



Records Manager Reference Guide



Records Manager

After logging in to the **Records Manager** module, you will see the Records Manager Home Page, shown below. This page contains two headers, **Tasks** and **Communications**. In this section, we will focus on the Tasks portion of the page. Messages are covered in the Docpad Reference Guide. Radekal Support links to the main support page for Radekal clients.

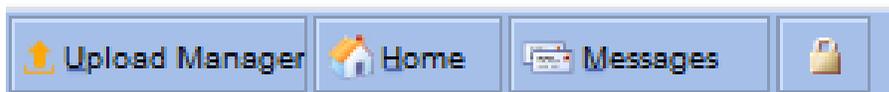
The **Records Manager** allows the user to associate a variety of documents to a patient's file. This is particularly useful when test results are returned or you have scanned the patient's records and want to make the documents available to the physician.

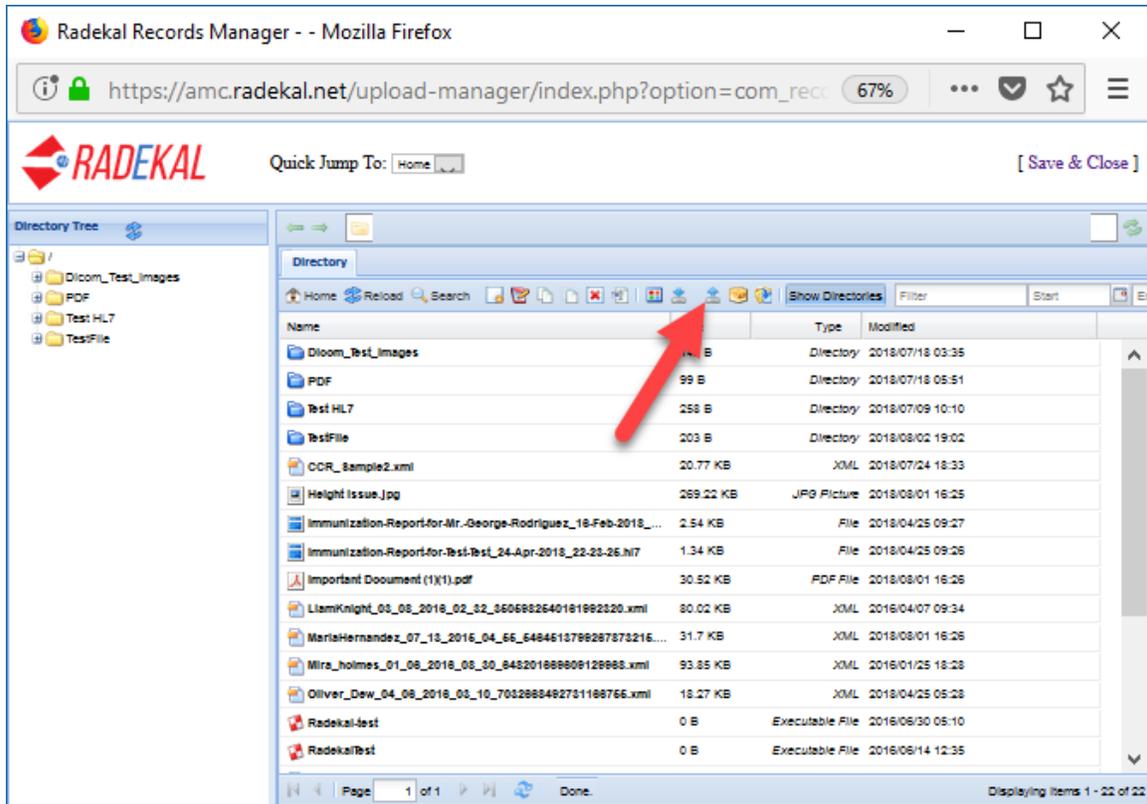


The **Tasks** section includes these features for dealing with scanned documents, managing notes, and filing test results. The tasks are shown in red when there are items to be managed.

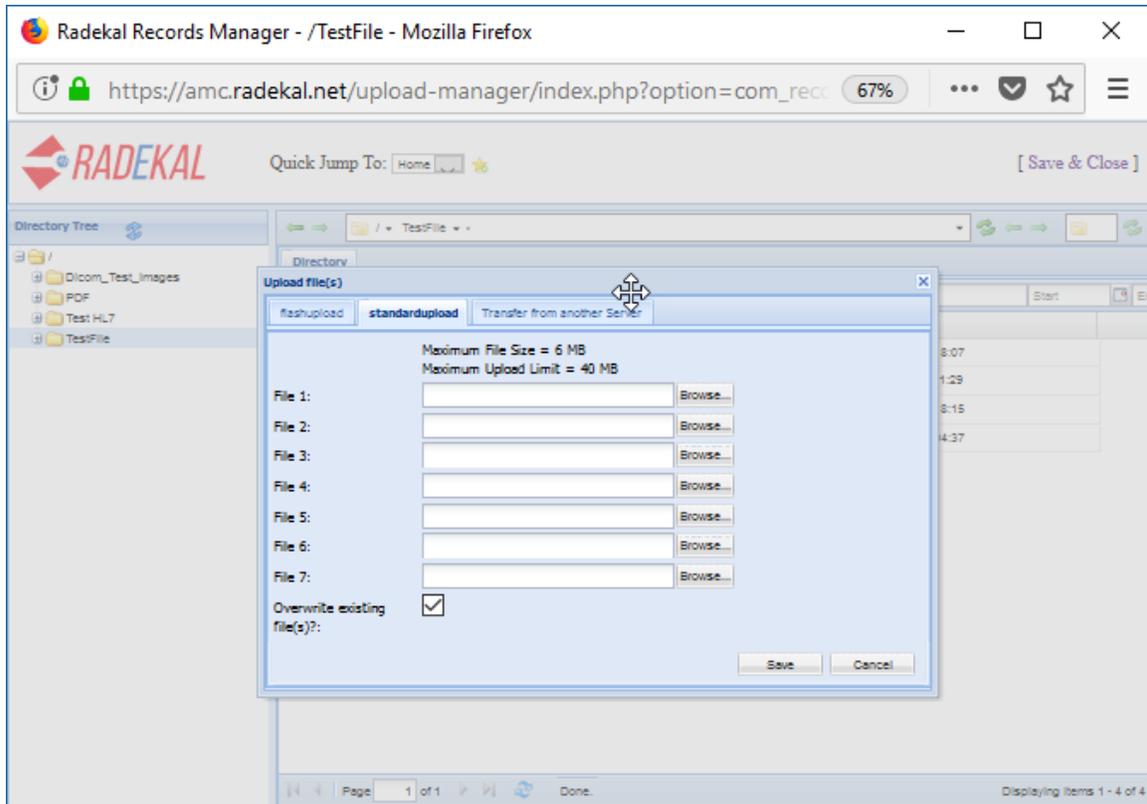
- **Create Documents:** Allows the user to transfer documents to specific patient charts.
- **Past Notes:** Allows the user to see different types of notes associated with a particular patient.
- **Attach Documents:** Allows user to attach documents to a patient's chart
- **Rejected Documents:** Shows documents the physician has rejected as not associated with that patient.
- **Unlinked Test Results:** Displays a list of results that need to be associated with a patient and sent to their file.

Like most of *Radekal*, there are several buttons on the top right banner:

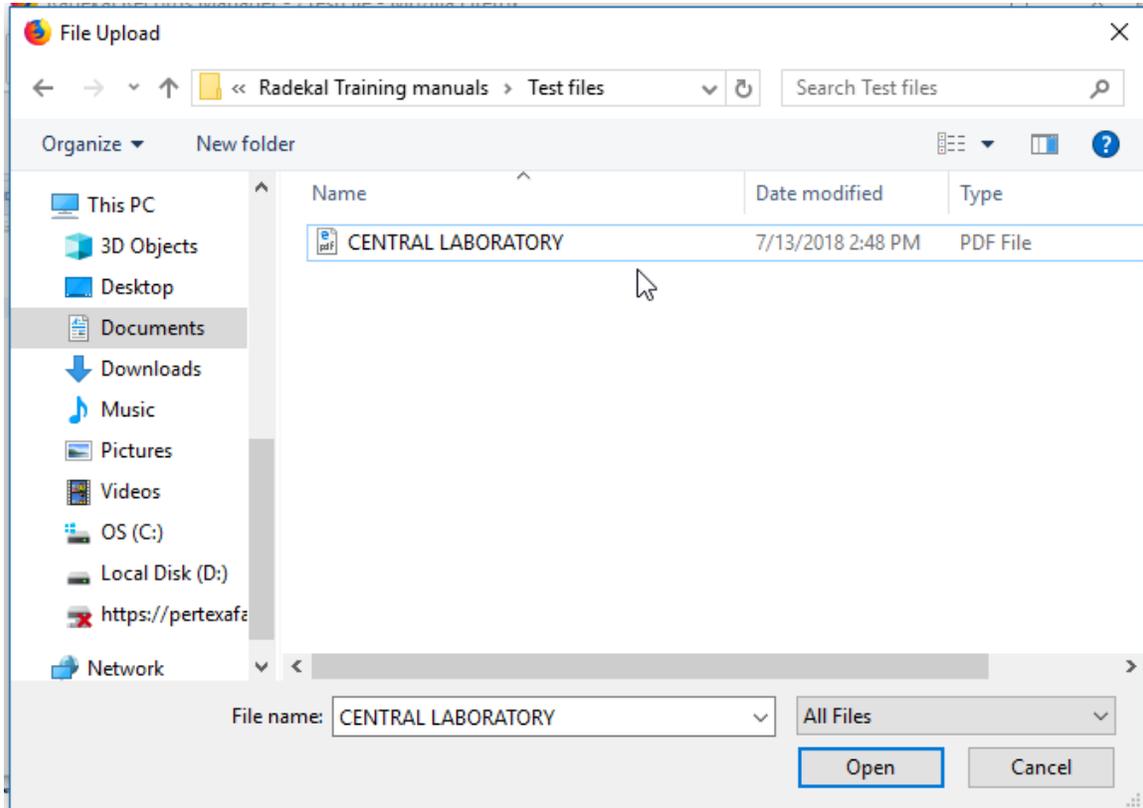




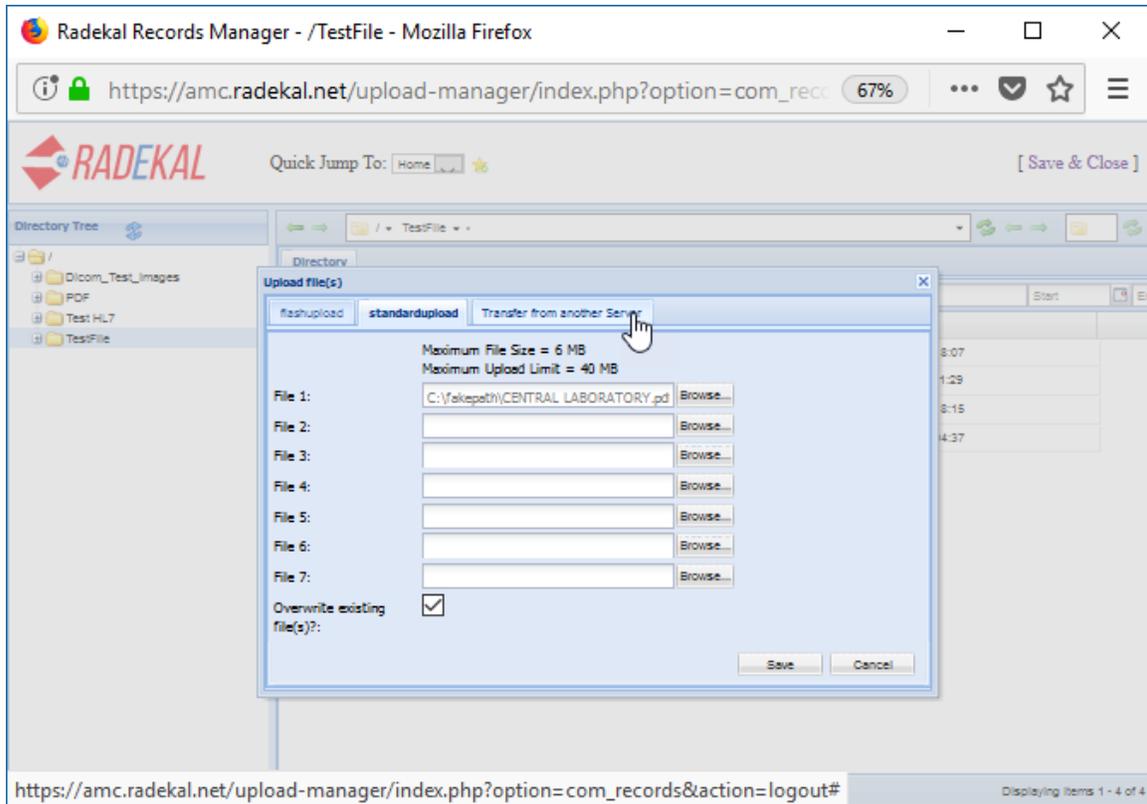
3. Click on Upload button (Blue Up Arrow icon in the heading just left of the bright yellow Archive icon) on the right of the pop-up. Another pop-up will open to allow you to browse your local computer files.



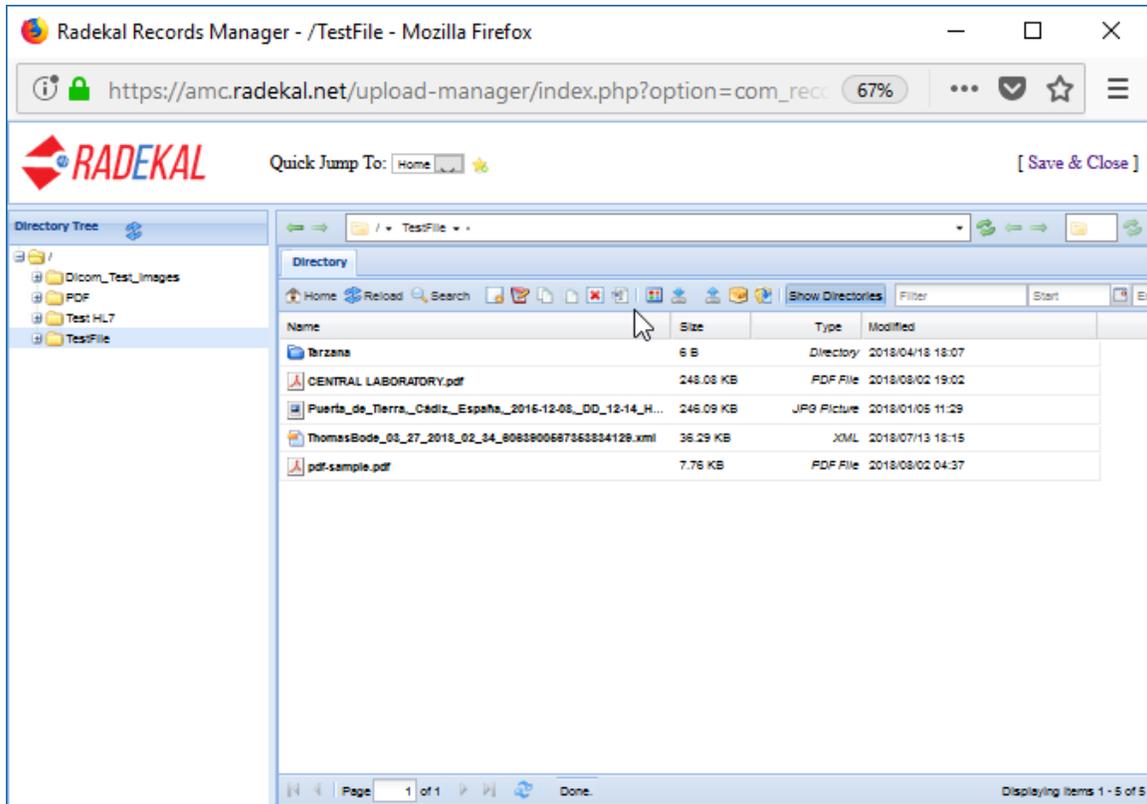
4. Click on Browse button. It will take you to your computer file directory where you can select any file to upload.



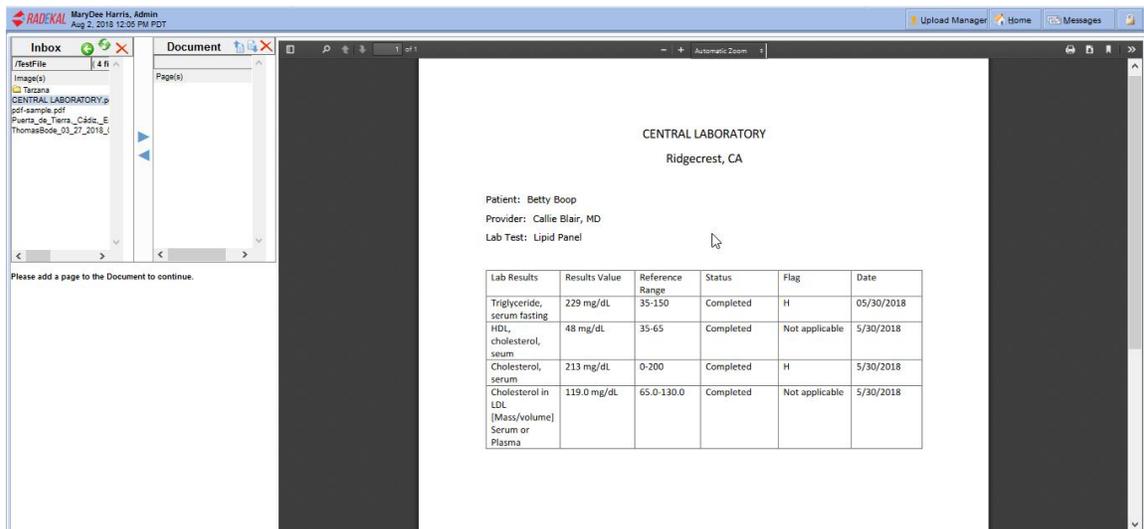
5. Click on other Browse buttons to add more files if desired.



6. Click on Save button.
7. Click on Save and Close link on top right corner. You can now see the uploaded file in the chosen directory.



8. Now go to Create Document.



9. Here you will see the uploaded files in the selected folder. From here proceed with the Create Documents process as described in the next section.



Create Documents

Clicking on **Create Documents** brings up this screen. This section is divided into 3 sections: **Inbox**, **Document**, and the **Image** screen. When you first start, the Image screen may be blank. The illustration below shows a Continuity of Care Record for a patient.

The screenshot shows the RADEKAL interface for a Continuity of Care Record (CCR) for patient Alice Sharpe. The interface is divided into several sections:

- Inbox:** A list of files including images, PDFs, and test files.
- Document:** A preview of the CCR document, showing patient demographics, alerts, problems, medications, and results.
- Continuity of Care Record:** The main content area containing the following data:

Date Created: Thu Mar 25, 2010 at 01:15 PM UTC-05:00
From: Jennifer Green MD (Personal Physician)
To: Interested Any/Person (Interested Party)
Purpose: Transfer of Care

Patient Demographics

Name	Date of Birth	Gender	Identification Numbers	Address / Phone
Alice Sharpe	Sep 19, 1969	Female	982226988	8726 Street Flint, Michigan 48903 +1-510-673-8378

Alerts

Type	Date	Code	Description	Reaction	Source
Drug Allergy	3/27/07	293588001 (SNOMED CT)	Aspirin allergy	Wheezing	Jennifer Green MD
Drug Allergy	5/20/99	91939003 (SNOMED CT)	Sulfonamides allergy	Hives, photosensitivity	Jennifer Green MD

Problems

Type	Date	Code	Description	Status	Source
Diagnosis	1/9/10	434.91 (ICD9-CM) 230950007 (SNOMED CT)	Cerebrovascular Accident (Stroke)	Resolved	Jennifer Green MD
Diagnosis	2/22/08	428.0 (ICD9-CM) 42343007 (SNOMED CT)	Congestive Heart Failure	Active	Jennifer Green MD
Diagnosis	9/16/07	410.90 (ICD9-CM) 67044005 (SNOMED CT)	Acute Myocardial Infarction	Resolved	Jennifer Green MD

Medications

Medication	Date	Status	Form	Strength	Quantity	SIG	Indications/Instruction	Refills	Source
lisinopril (Zestril)	2/22/2008	Active	Tablet	50 mg	1 tab	QD PO	1 tablet by mouth 1 per day		Jennifer Green MD
spironolactone (Aldactone)	2/22/08	Active	Tablet	25 mg	1 tab	QID PO	1 tablet by mouth 4 times per day		Jennifer Green MD
digoxin (Lanoxin)	2/22/08	Active	Tablet	125 mcg	1 tab	QD PO	1 tablet by mouth 1 per day		Jennifer Green MD

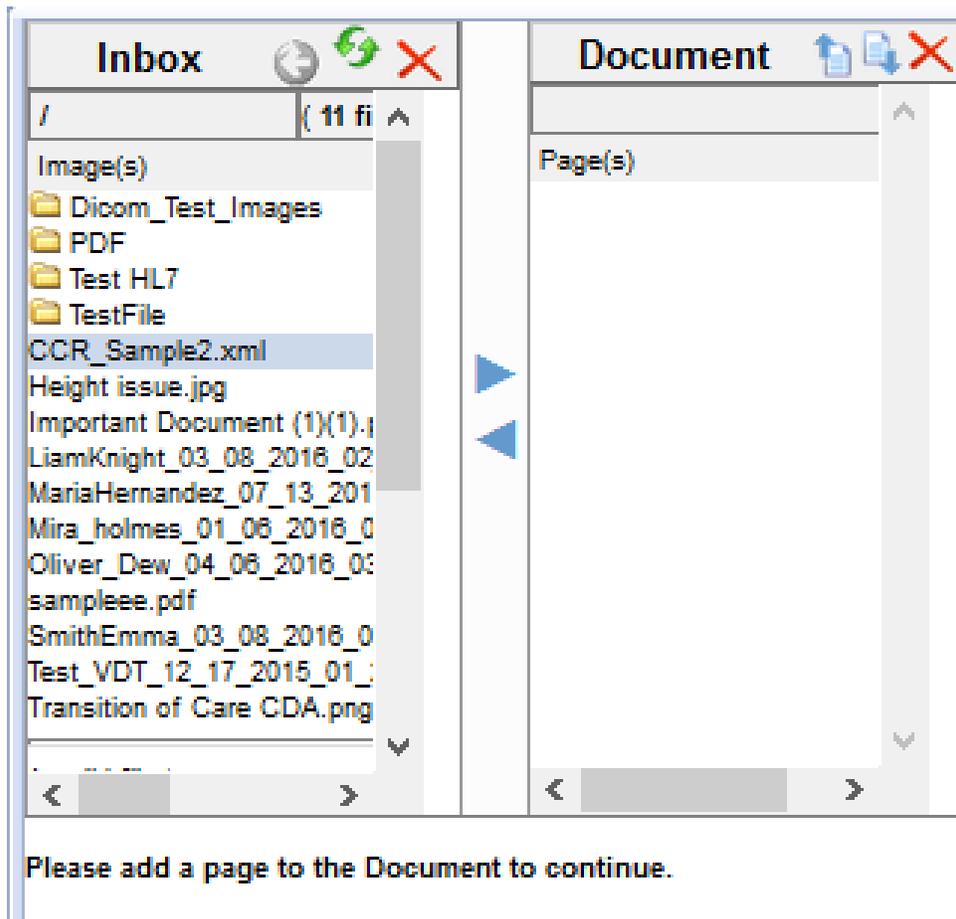
Results (Discrete)

Test	Date	Result	Source
Sodium	2/24/10	Sodium 140 mg/dl	Jennifer Green MD
Potassium	2/24/10	Potassium 4.5 mg/dl	Jennifer Green MD
Hemoglobin	2/17/10	Hemoglobin 16 g/dl	Jennifer Green MD

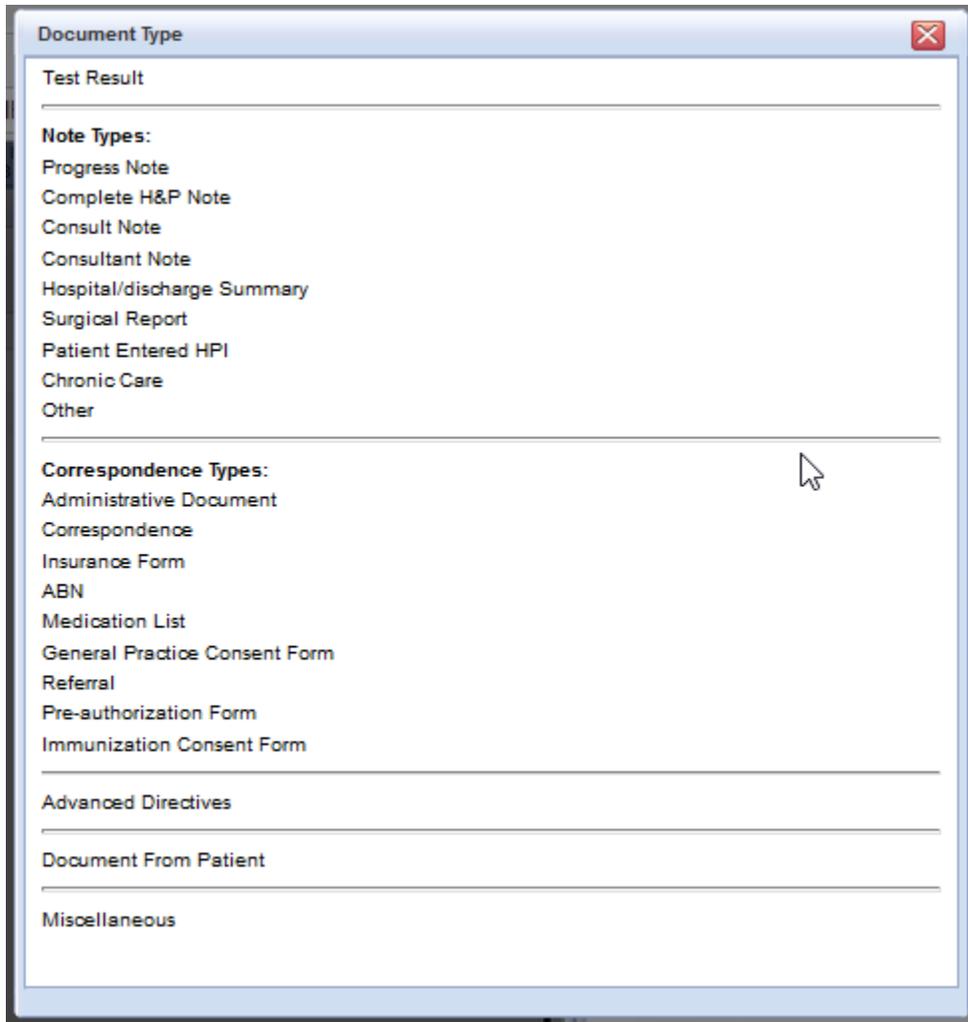
*** Document Type:** Chart Summary
*** Patient:** Alice Sharpe
*** Transition of Care:** Yes
*** Required field**

Inbox and Document: These two sections are used to transfer files from the users desktop to the *Radekal* system. The user can have multiple directories in the **Inbox**. Files can be transferred to the **Document** section so they can be placed in a selected **Document Type** for a patient.

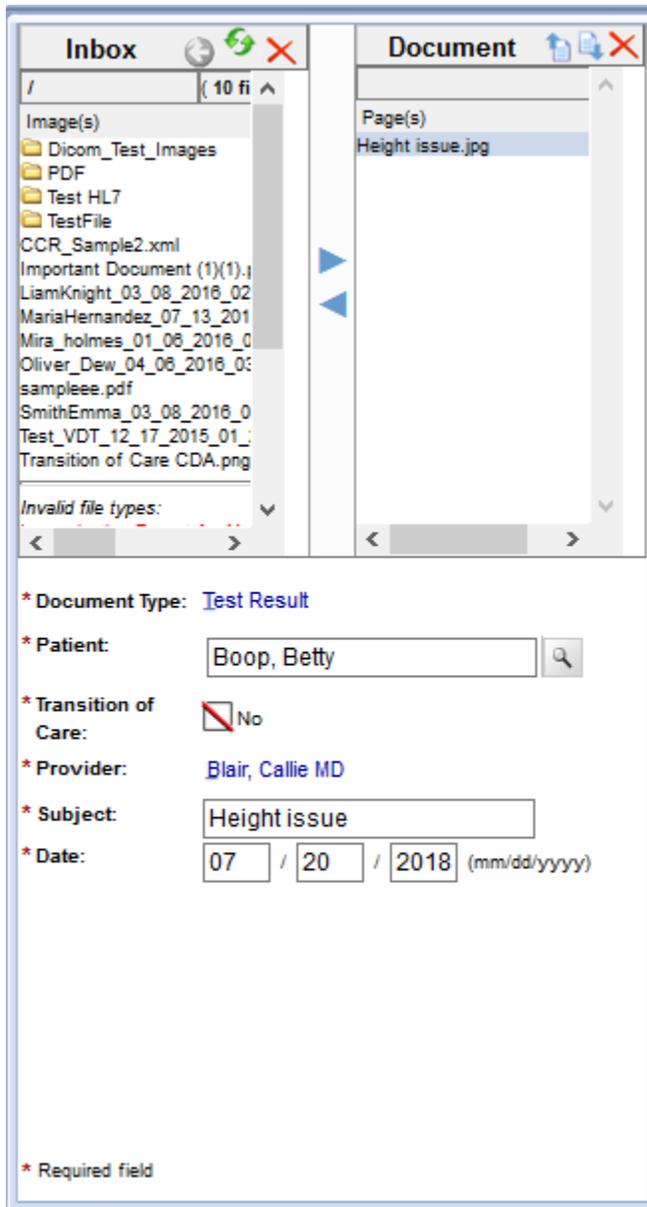
The blue arrows between the **Input** and **Document** boxes allow you to select a file for handling. For example, when you hit the right-pointing arrow, the file name selected in the Inbox will be shown in the Document box and its image will appear in the Image box to the right (not shown here). After a file has been handled, the name can be removed by clicking the left-pointing arrow to move it back to the Inbox.



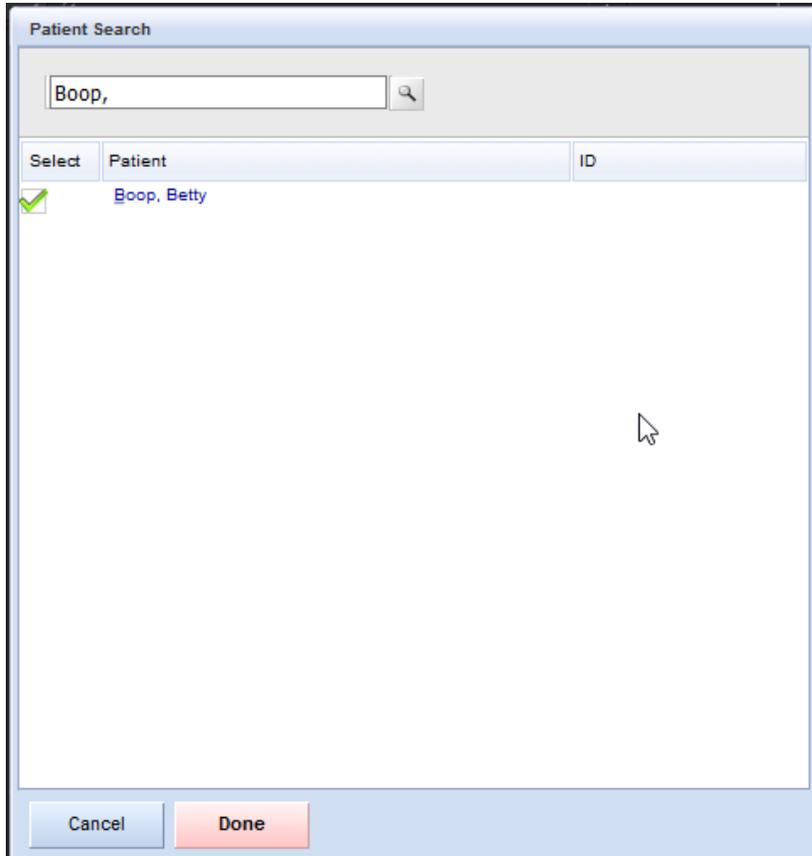
The **Document Type** is a pop up with a variety of selections. The user clicks one of the selections to associate the document to that type.



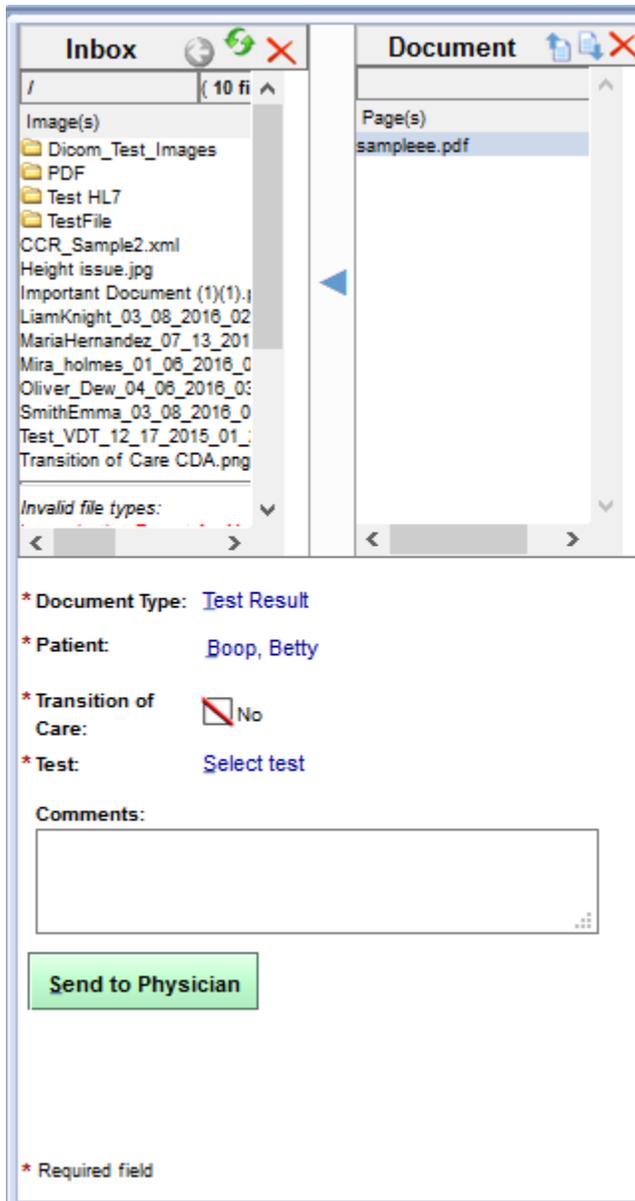
Once the user selects a Document Type, more blank fields begin to populate, depending on the type selected. These fields route the document to the proper location in the Radekal system. Here's an example of a Test Result document to be associated with the patient's chart.



To link this test result with a patient, select the patient by typing in the name and clicking the Search (magnifying glass) icon. That brings up a patient search window with a list of patients for the name given (in this case only one). Select the one you want and click on the box to the left of the name.



When you click Done, there will be additional fields listed under the Inbox/Document boxes.



*** Document Type:** [Test Result](#)

*** Patient:** [Boop, Betty](#)

*** Transition of Care:** No

*** Test:** [Select test](#)

Comments:

[Send to Physician](#)

*** Required field**

Now select the test ordered for this patient to make the link, add any appropriate comments, and click the **Send to Physician** button to create the link.



The **Image** section of the Create Document page shows the scanned document. The upper right corner has controls for how to see the document.

1. Full Screen Window: expands the window to fill the users screen area.
2. Rotate: turns the document clockwise 90 degrees every click
3. Fit in Window: If the file is big, it reduces the proportion to fill in the designated viewing area.
4. Zoom to Full Size: shows the document in its full size.
5. Zoom In: expand document
6. Zoom Out: decrease document
7. Arrows: can move the document up, down, left, and right.





Past Notes

Past Notes is set up to let the user see existing patient notes. These notes are specific to the patient being viewed. First you enter the patient's name using Search, which gives you a list of past notes for that person.

The screenshot shows the RADEKAL interface for a patient named Randy Jones. The interface includes a header with the RADEKAL logo, user information (MaryDee Harris, Admin), and a date/time stamp (Jul 11, 2018 11:49 AM PDT). Below the header, there are navigation tabs for MD Notes, Consultant, Other, Nurse, Forms, Directives, Reminder, Summary, and Documents. A 'Notes Filter: Show All Past Notes' button is visible. The main content is a table of notes with columns for Date, Note Type, Subject, Sender, Provider, and Status. The table contains six rows of data, with the last row selected.

Date	Note Type	Subject	Sender	Provider	Status
03-16-2018 08:47 PM	Phone Conversation	Et called for update on...	CB	CB	Closed
03-16-2018 01:15 PM	Eprogress	Chronic tension-type...	CB	CB	Closed
02-01-2018 10:33 AM	Eprogress	Low back pain	US	US	Closed
11-20-2017 05:24 AM	Eprogress	.	ST	ST	Closed
10-25-2017 11:52 AM	Eprogress	Unspecified open wound of...	US	US	Closed
10-04-2017 11:30 AM	Complete H&P	Chronic obstructive...	JE	JE	Closed

When you select a particular past note, it will be displayed and can be printed or downloaded or faxed.



Jones, Randy DOB: 03-31-1956

Reviewed Note

Progress Note
Crofton Medical
AMC Avenue
Ridgecrest, CA 93555
02-01-2018

Patient Name: Randy Jones	Examining Provider: US Support, Admin
Patient ID: 16	
Patient Birthdate: 03-30-1956	
Patient Age: 61 years	

Chief Complaints [\(Annotate\)](#)
Back pain

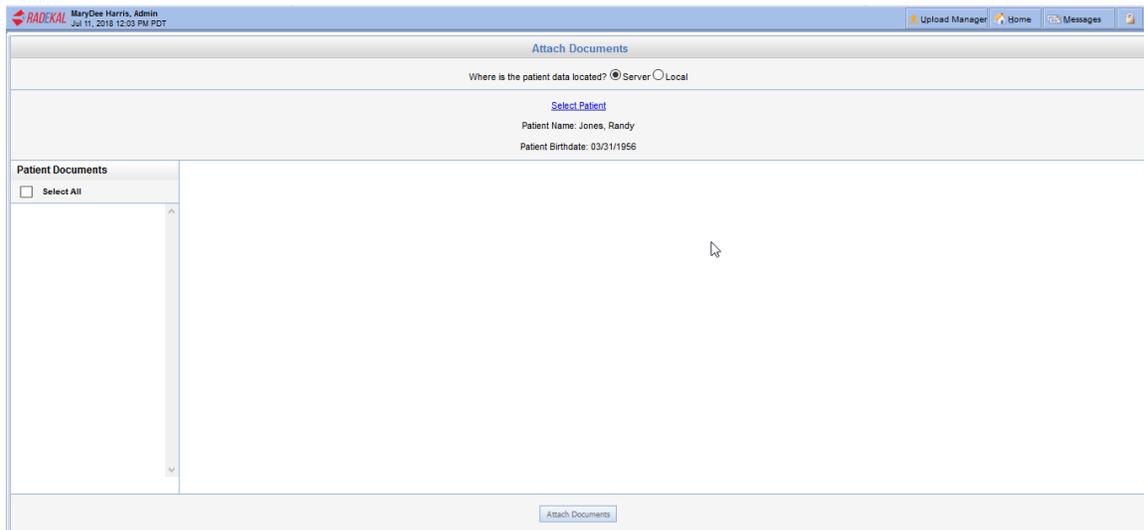
History of Present Illness [\(Annotate\)](#)

Mr. Randy Jones is a 61 year old male patient here today complaining of back pain. He has chronic back pain. The problem is constant. The patient reports numbness. The back pain is located between the shoulder blades. The problem is located on the middle back over spine. It radiates to the left outer hip region and to the right outer hip region. He reports numbness or dysesthesia in the left fingers and the right fingers. The back pain had no obvious cause. Mr. Jones reports sharp pain. The problem is severe. It is improved by NSAIDs.

Page Up ▲ ▼ Page Down

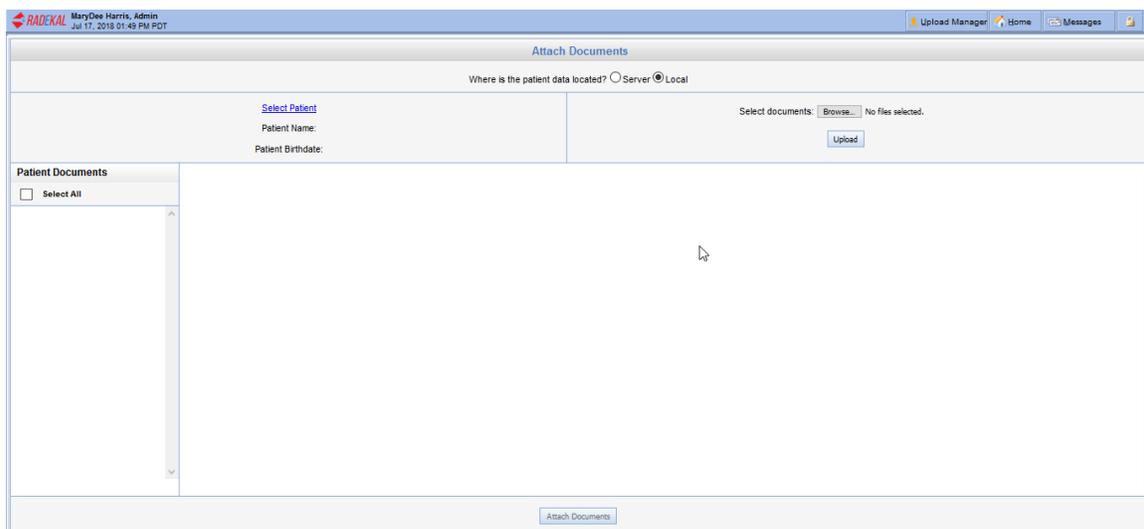
Attach Documents

Attach Documents gives the user another way to add documents to a patient's chart. Once again you choose a patient to begin, using the search button and selecting the appropriate patient.



Notice the choice at the top: Server or Local. You choose where the document is located that you want to be attached. When you choose Local, you can upload a document from the computer you're using.

Select Patient works just like it does in Create Document: use Search to find the name, then click the magnifying glass, then click the box in front of the name, and click Done.



Select the document you want to attach to the patient's file and click Attach Documents at the bottom of the page. No message will appear, but the document will be attached.



When you go to Docpad, you can find the document from the Face Sheet as follows:

- Select the patient and go to the Face Sheet
- Click the View button next to Past Notes
- Select the Documents tab to see the document you just attached to the chart.



Rejected Documents

Rejected Documents (n) lists the test results or other documents that have been rejected by the provider for one reason or another. Mostly commonly a test result has been linked to the wrong patient and much be corrected. The item can be deleted from this page or selected for more options. (The ‘n’ in parentheses indicates the number of Rejected Documents.) This option only shows up if n is not equal to zero.

Patient	Provider	Document Type	Subject	Date *	Delete
TEST_3	CB	Test Result	Test lab		X
Patient_First	JE	Progress Note	Test Note	03-12-2018 05:54 AM	X
Two_Test T	BWS	Test Result	ECG 12 Lead		X

Selecting an item from the list returns the user to the Create Document page with an option to Delete the document entirely or to correct it by choosing the appropriate patient and then sending it back to the physician.

Inbox 🔄 ✖

/ (10 fi ^

Image(s)

- 📁 Dicom_Test_Images
- 📁 PDF
- 📁 Test HL7
- 📁 TestFile

CCR_Sample2.xml
Height issue.jpg
Important Document (1)(1).j
LiamKnight_03_08_2016_02
MariaHernandez_07_13_201
Mira_holmes_01_06_2016_0
Oliver_Dew_04_06_2016_0:
SmithEmma_03_08_2016_0
Test_VDT_12_17_2015_01_:
Transition of Care CDA.png

Invalid file types: ▾

< >

Document 🔍 📄 ✖

Page(s)

20171002233203-2196-1_3_

< >

* Document Type: [Test Result](#)

* Patient: [TEST, 3](#)

* Transition of Care: No

Comments:

Addendums:

Delete this Document

Send to Physician

Page Up ▲

Page Down ▼

* Required field



Unhandled Test Results

Unhandled Test Results (n) is set up to link test results with a particular patient. The patient's results are listed on the left section of *Radekal*. The user can search for a patient to send the test result to that patient's chart. (The 'n' in parentheses indicates the number of Unhandled Test Results.) This option only shows up if n is not zero.

The Unhandled Test Results page will display a list of all patients with unlinked test results. You can also search for a patient by last name. Click on a patient name to proceed.

RADEKAL System Administrator, Admin
Apr 17, 2018 10:42 PM PDT

Upload Manager Home Messages

Unhandled Test Results

!	Patient	Provider	Test	Performed	Delete
	TEST, TC13	DURRBANNA, BILLOFER	Clinical PDF Report KS228358T-1	04-18-2018	X
	TEST, TC13	DURRBANNA, BILLOFER	PRO TIME WITH INR	04-18-2018	X

! = Rejected by Provider

Done

Selecting a patient and test result brings up a page with two sections. The left section contains two tabs: **Information Received** and **View Test Result**. The right section is **Select Patient**. The first tab, Information Received, shows the identifying information about the test and the patient.



System Administrator, Admin
Apr 17, 2018 11:17 PM PDT

Upload Manager Home Messages

Unhandled Test Result

Information Received: View Test Result 1. Select Patient:

Test: PRO TIME WITH INR
Test Code: 8847
Performed: 04-18-2018
Patient Name: TEST, TC13
Date of Birth: 05-13-1978
Provider Name: DURRBANNA, BILLOFER

Search by last name:
Clear TEST, TC

Cancel Done

View Test Result displays the test result for review. Click Done to return to previous page to continue.

System Administrator, Admin
Apr 17, 2018 11:18 PM PDT

Upload Manager Home Messages

Unhandled Test Result

Information Received: View Test Result 1. Select Patient:

Test: PRO TIME WITH INR
Test Code: 8847
Performed: 04-18-2018
Patient Name: TEST, TC13
Date of Birth: 05-13-1978
Provider Name: DURRBANNA, BILLOFER

Results: PRO TIME WITH INR

Performed: 04-18-2018

Results:

Radekal Order ID: Patient: TC13 TEST
Organization: QUEST DIAGNOSTICS LENEXA Patient ID: PID13
Address: 10101 RENNER BLVD DOB: 05-13-1978
LENEXA, KS 66219-9752 Gender: Female
Lab Med Director Id: 1000912445 Race:
Lab Med Director Name: BECKER WILLIAM

Specimen Type: Source, Unspecified
Specimen Coll. Start: 12-10-2015 00:00:01

Test Name: Clinical PDF Report KS228358T-1 Report Date: 02-14-2018 22:24:01

OBSERVATION	RESULT	UOM	RANGE	ABNORMA L FLAG	STATUS	DATE/TIME OF OBSERVATION	COMMENT
Clinical PDF Report KS228358T-1					F		
INR	1.2		H	F			Reference Ran ne

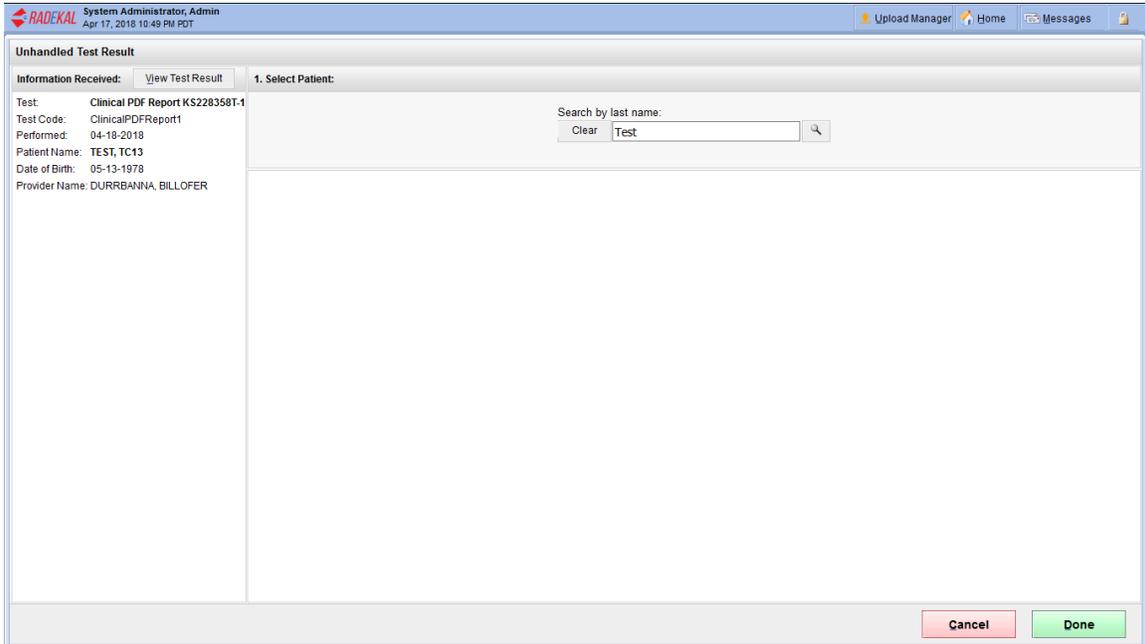
Page Up Page Down

Annotation: Annotate

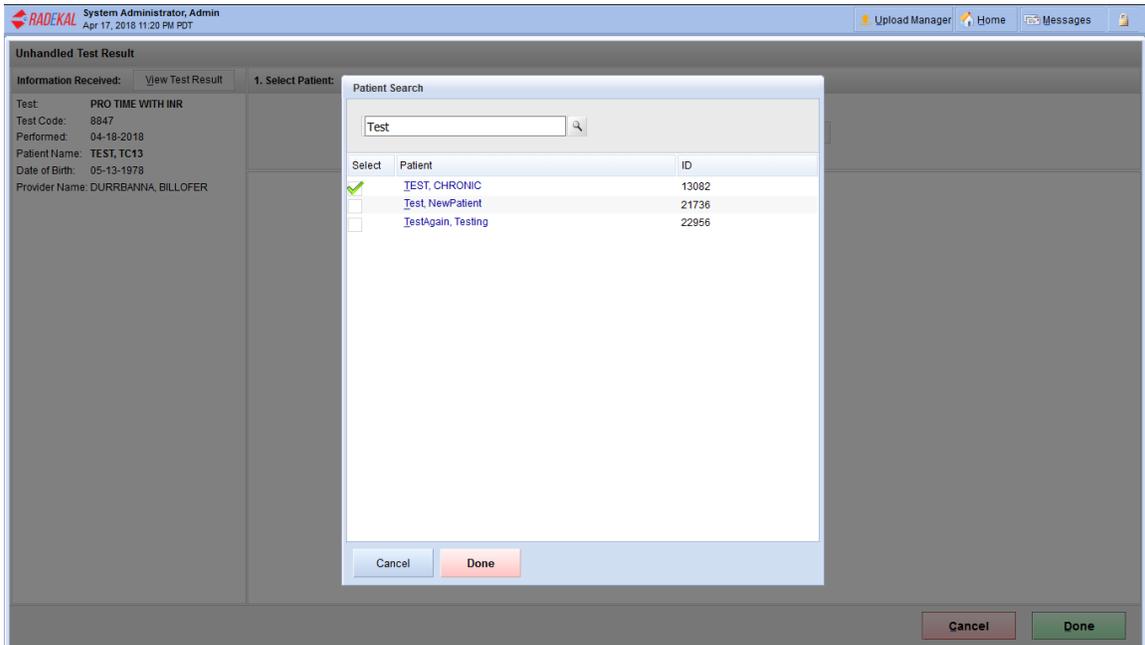
Cancel Done

Cancel Done

To connect this test result with the proper patient, use the Patient Search box to find the Patient and click on Search button.



Then select the patient by checking the box to the left of the patient name, then click Done.



The test result will now be attached to the proper patient.