

Paper Chart Manager

User Instruction



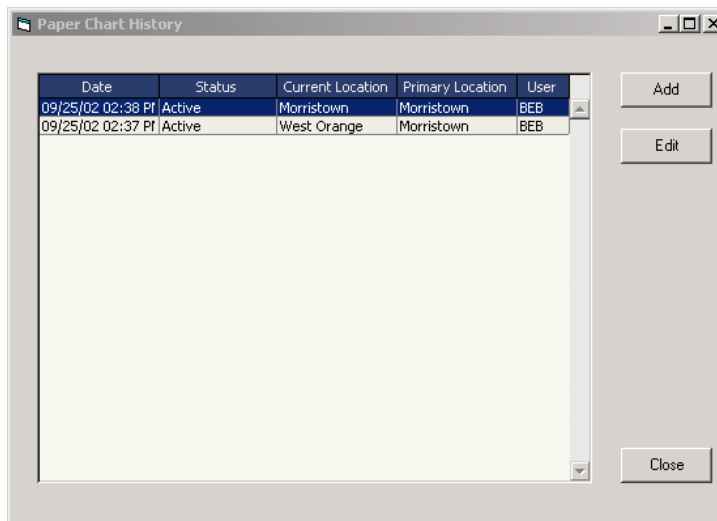
Although RESource gives practices the opportunity to function as “paperless”, there will be some paper records. Each patient will still have a paper chart. The chart will be used to file documents including previous medical records, the paper intake form, signed consents and surgery pictures.

The Paper Chart Manager allows you to track the location and status of a patient’s paper chart. This is useful when you have multiple office sites where charts may travel from one site to another. An entry should be made in the patient’s Paper Chart Manager when the chart is first created, and each time the chart is moved to a different office location or changes status.

To access a patient’s Paper Chart History:

1 - select the desired patient in the Patient Explorer

2 – go to the Patient option in the main menu and select **Paper Chart Manager**. The Paper Chart History window will appear displaying any entries previously made for that chart.



To Add a paper chart record:

1 – bring up the **Paper Chart History** as described above

2 – click the **Add** button on the right side of the window. Complete all fields in the window that appears. Notice that the current date and time, and your initials are automatically entered.

The screenshot shows a dialog box titled "Paper Chart History" with a "Chart Status Info" section. It contains the following fields:

- Primary Location: A dropdown menu with "Morristown" selected.
- Current Location: An empty dropdown menu.
- Status: An empty dropdown menu.
- Date Changed: A date dropdown showing "06/17/2004" and a time dropdown showing "10:00 AM".
- User: A text input field containing "BEB".

On the right side of the dialog, there are two buttons: "OK" and "Cancel".

3 – click the **OK** button. You will not have the option to click the **OK** button until all fields have been completed.

To Edit a paper chart record:

1 – bring up the **Paper Chart History** as described above, and select the entry to be edited by clicking on the row.

The screenshot shows the "Paper Chart History" dialog box with a table of records. The table has the following columns: Date, Status, Current Location, Primary Location, and User. The row for "10/10/01 09:27 AM" is highlighted in blue. To the right of the table are two buttons: "Add" and "Edit".

Date	Status	Current Location	Primary Location	User
02/18/04 10:50 AM	Temporary	West Orange	Morristown	BEB
09/11/03 10:59 AM	Active	Morristown	Morristown	BEB
12/21/01 10:16 PM	Active	Morristown	Morristown	SAJ
12/21/01 02:46 PM	Temporary	Somerset	Morristown	PAB
10/10/01 09:27 AM	Active	Morristown	Morristown	BEB
09/08/00 10:42 PM	Archived	West Orange	Morristown	PAB
09/08/00 10:40 PM	Active	West Orange	Morristown	PAB

2 – click the **Edit** button and make any necessary changes. The initials in the User field will change to reflect whoever is editing the data.

3 – click the **OK** button