

Upload scanned referrals

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Scan referrals and save them to the patient's record in Zedmed Cloud. Scanned files are automatically uploaded to the cloud every 2 to 6 minutes. You can also manually upload scanned documents instantly, as explained in the 'Quickly upload a scan' section.

Quickly upload a scan to a patient's file

This section explains how to quickly upload a scanned document to the cloud if you do not want to wait for the automatic sync.

1. Scan the document and save it to a folder on your workstation.

Create a folder on your workstation to use for manually uploading scans. E.g. C:\ZedmedScans.

2. From the cloud menu, select My Files.



The My Files screen will open.

3. Select the Zedmed Scans Folder.

My Files			×
1			
0			
Q		<	1 > ©
Name	▼ Last modified	⊽ Size	∇
Zedmed Scans Folder	19/11/2024, 7:53 am	-	
Temporary Files	19/11/2024, 7:52 am	-	
🗅 Home Folder	19/11/2024, 7:52 am	-	

4. Select Upload file(s).

My Files	×
/ > Zedmed Scans Folder	
Actions Create folder Upload file(s) C	

5. Locate, select and **Open** the scanned file.

This PC > 0	S(C:) > ZedmedScans		5	Search ZedmedScans	C
	-(-)				
Organise 🔻 New folder					-
10.11	Name	Date modified	Туре		
P Quick access	Scanned referral 1	19/11/2024 8:40 AM	Adobe Acrobat		
Desktop	Scanned referral 2	19/11/2024 8:40 AM	Adobe Acrobat		
Patient Files	Scanned referral 3	19/11/2024 8:40 AM	Adobe Acrobat		
File name				All Eiler	

6. Open the Patient's record in **Clinical**.

You may need to open **Clinical Records** from the **Reception** tab, then use the **Open Patient** menu to search for the patient.

- 7. Under Summary Views, select the Incoming Documents tab.
- 8. Select the paperclip icon.

Windows Explorer will open and show the uploaded scans.

- 9. Select the referral.
- 10. Select Open.

Summary Views	Attach Document				×
Problems					~
Referrals		≪ Zedmed → Scan →	マ Ö Search	Scan	Q
Results	Organize 🔻 New	folder		iii 🔹 🖬	0
Immunisations		Name	Date modified	Type	Siz A
Allergies	This PC	macOs-test-02	20/02/2024 2:56 PM	RTF File	STL.
Images/ECG		Page 2 PDF	18/07/2024 2:39 PM	PDF File	
Pregnancies		Conned referral 1	19/11/2024 8:45 AM	PDF File	
Documents		scan-test	15/05/2024 11:16	Text Document	~
Attachments		<			>
Measurements		File name: Scanned referral 1	~ Docur	nent Files (*.doc; *.pdf	*. ~
Medications					
Incoming Documents				Canc	ei .

The **Document Details** screen will open.

scription	
Emma Black Initial Referral	
cument Date Time	
19/11/2024 🔍 🗸 09:2	27 AM ≑
k with Doctor	
er Name	Doctor Code
EASON, Dr AUGUSTUS	AE
FERNANDEZ, DANUTA	DF
JACKSON, Dr GAYE	GJ
Herman, Grace	GH1
Howell, Dr Grenville	GH
HERNANDEZ, LYDIA	LH
Phillip, Dr Davis	PD
Hedrick, Dr Warren	WH
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ve As: O Result Incomin	ng Document

- 11. Update the applicable options, including:
 - a. In the **Description** field, enter <full name> Referral <DOB>.
 - b. Tick **Doctors has already seen** (stops the referral from appearing in the Results Inbox).
 - c. Select Incoming document.
- 12. Select OK.

The referral will be saved to **Summary Views > Incoming Documents.**



Bulk upload scans and assign to patients

Documents scanned to the default location of the clinic's Multi-Function scanner are automatically uploaded to Zedmed Cloud. This section explains how to locate those scans and add them to patients. Alternatively, you can manually upload multiple scan files by following steps 1-9 in the section above.

Scans should be named with the patient's full name and DOB so they can be matched to the correct patient in Zedmed.

To assign multiple scanned referrals:

- 1. Go to Zedmed's **Reception** tab.
- 2. Select Clinical Records.

Zedmed Clinical will open.

3. Select **Scan** from the clinical menu.



The **Scanning** tool will open.

4. Select the File List tab.

All scanned documents will be displayed.

- 5. Select the first referral to be assigned to a patient.
- 6. Type the patient's <u>surname</u> into the **Patient** Search field.

Scanning						×
File Options Scan	Image Thumbnails File List	1				
Black & White Letter Colour Letter Custon Patient Barker Find Patient	Name adf-provider_schedule-of-fee adf-provider_schedule-of-fee adf-provider_schedule-of-fee Jay-Smith-23-11-72.pdf Emma-Black-13-12-82.pdf Emmiy-Barker-1-6-11.pdf	Size Da s_chir 133,170 bytes 29// s_chir 60,411 bytes 29/ s_chir 144,135 bytes 29/ 13,173 bytes 19/ 13,173 bytes 19/ 13,173 bytes 19/	ite Created 04/2024 12:4' 04/2024 12:4' 04/2024 12:4' 11/2024 9:58: 11/2024 9:58: (11/2024 11:1-	1:37 PM 1:37 PM 1:37 PM :12 AM :12 AM :12 AM 4:55 AM	1	
No Patient Selected			<u>о</u> к	×	ance	1

7. Select the Find Patient button.

The Patient Selector will open. and display the results

8. Locate the patient and confirm the date of birth matches the file.

🛯 Patient Se	lector				100	×
H	► All Records for this Search Loa	ded				
File #	Name	DOB	Address	Phone	Status	
61	Barker, Emily	01/06/2011	31 Front Street INALA 4077		CUR	
					_	
Other file num	nbers:		New Include Arc	hived and Deceased	Select	ancel

9. Select the patient and click the **Select** button.

The patient information will be displayed in the Scan tool UI.

10. Select Results/Reports.

Scanning				\times
File Options Scan		Image Thumbnails File List		
Black & White Letter Colour Letter Patient Find Patient Barker, Emily	Custom Scan	Name adf-provider_schedule-of-fees_chir adf-provider_schedule-of-fees_chir Jadf-provider_schedule-of-fees_chir Jay-Smith-23-11-72.pdf Emma-Black-13-12-82.pdf	Size Date Created 133,170 bytes 29/04/2024 12:41:37 PM 60,411 bytes 29/04/2024 12:41:37 PM 14:4135 bytes 29/04/2024 12:41:37 PM 13,173 bytes 19/11/2024 9:58:12 AM 13,173 bytes 19/11/2024 9:58:12 AM 13,173 bytes 19/11/2024 9:58:12 AM	~
Address: 31 Front Street, INALA 4077 DOB: 01/06/2011 Home: Age: 13 years Work: Medicare No: 4950152241 Mobile: File No: 61 Occupation: Unique ID:	61			
Move Image to Results/Report Image Associations Reference Results/Report Connect Image	General Images			
New Existing	53			
? Help			✓ <u>O</u> K ¥ <u>C</u> a	incel

The **Document Details** screen will open.

- 11. Update the applicable options, including:
 - a. Enter the <full name> Referral <DOB> in the **Description** field.
 - b. Tick Doctor has already seen this (stops the referral from appearing in the results inbox).
 - c. Select Incoming Document.

Emily Barker Referral 1/6/11	
19/11/2024 III-	20 AM
ink with Doctor	
Iser Name	Doctor Code
EASON, Dr AUGUSTUS	AE
FERNANDEZ, DANUTA	DF
JACKSON, Dr GAYE	GJ
Herman, Grace	GH1
Howell, Dr Grenville	GH
HERNANDEZ, LYDIA	LH
Phillip, Dr Davis	PD
Hedrick, Dr Warren	WH

12. Select OK

The Scan tool will remove the scan from the File List and display it under New.

File Options Scan	Image Thumbnails File List		
Black & White Letter Colour Letter Custom Scan Patient Find Patient Barker, Emily Address: 31 Front Street, INALA 4077 DOB: 01/06/2011 Home: Aqe: 13 years Work: Medicare No: 4950152241 Mobile: File No: 61 Occupation: Unique ID: 61 Move Image to Results/Reports General Images	Name adf-provider_schedule-of-fees_chir adf-provider_schedule-of-fees_chir adf-provider_schedule-of-fees_clini Emma-Biack-13-12-82.pdf Jay-Smith-23-11-72.pdf	Size Date Created 144,135 bytes 29/04/2024 12:41:37 PM 133,170 bytes 29/04/2024 12:41:37 PM 60,411 bytes 29/04/2024 12:41:37 PM 13,173 bytes 19/11/2024 9:58:12 AM 13,173 bytes 19/11/2024 9:58:12 AM	
Image Asociations Referrals Results/Reports General Images New Emily Barker Referral 1/6/11 - Emily-Barker-1-6-11.pdf Existing			

13. Select the **Save** button.

The scan will be confirmed as saved under **Existing**.

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cienais	Results/Reports	General images
New		
Existin	g	
	10/11/202/ En	aily Darker Deferral 4 /6 /44

The referral will appear in the patient's clinical record under **Summary Views > Incoming Documents.** 14. Add the next scanned referral to the next patient.

Begin from Step 6 - find the next patient.

15. When all referrals have been assigned to the patients, select **OK** to close the **Scan** tool.