Upload scanned referrals

Last Modified on 29/11/2024 11:53 am AEDT

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.

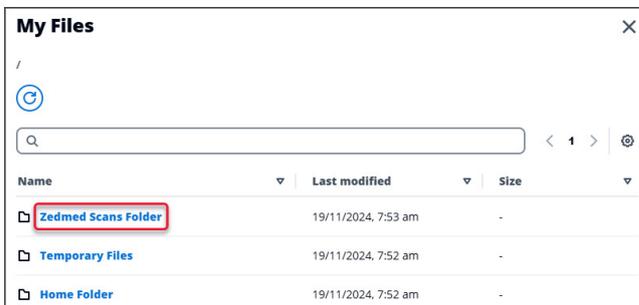1. Scan the document and save it to a folder on your workstation.

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

2. From the cloud menu, select **My Files.**

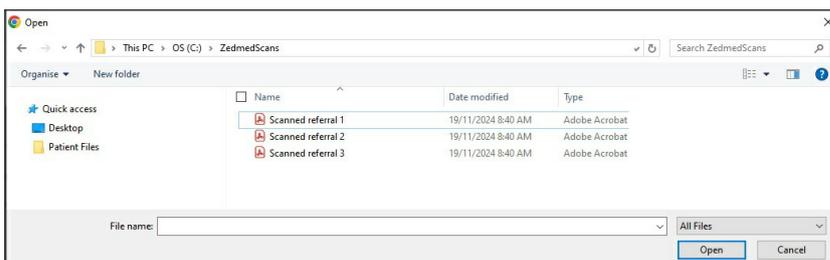   The **My Files** screen will open.

3. Select the **Zedmed Scans Folder**.

4. Select **Upload file(s).**

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

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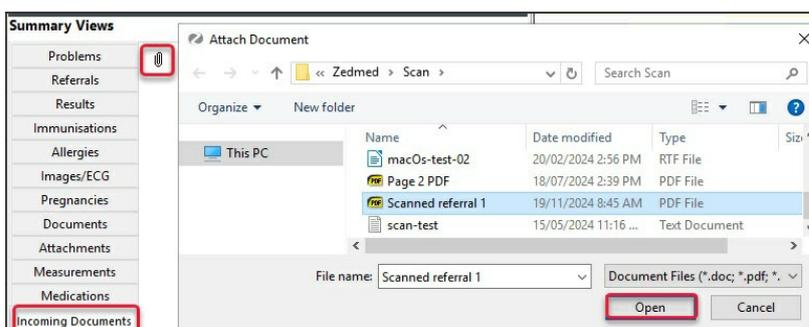7. Under **Summary Views**, select the **Incoming Documents** tab.
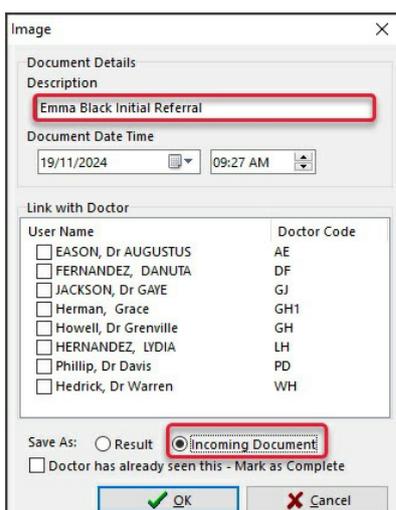8. Select the paperclip icon.

   Windows Explorer will open and show the uploaded scans.
9. Select the referral.
10. Select **Open**.
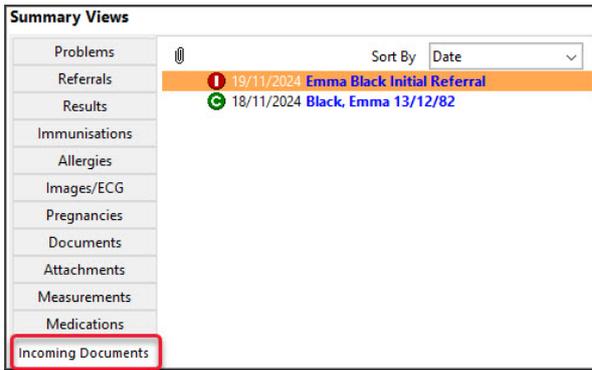

The **Document Details** screen will open.

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.
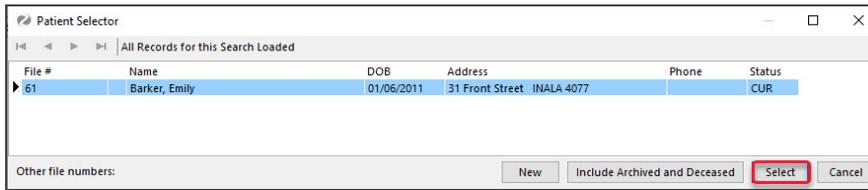

   The **Scanning** tool will open.
4. Select the **File List** tab.

   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.
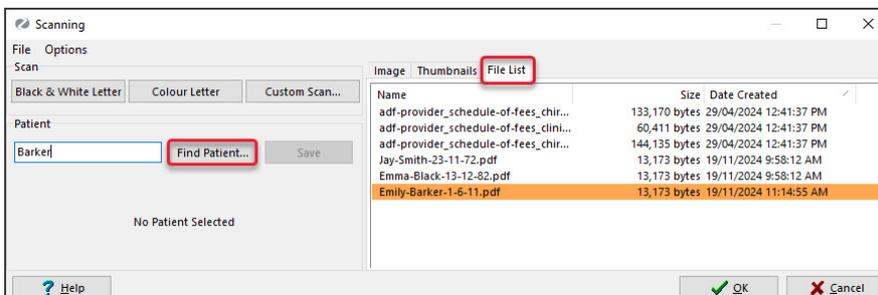
7. Select the **Find Patient** button.

   The **Patient Selector** will open. and display the results
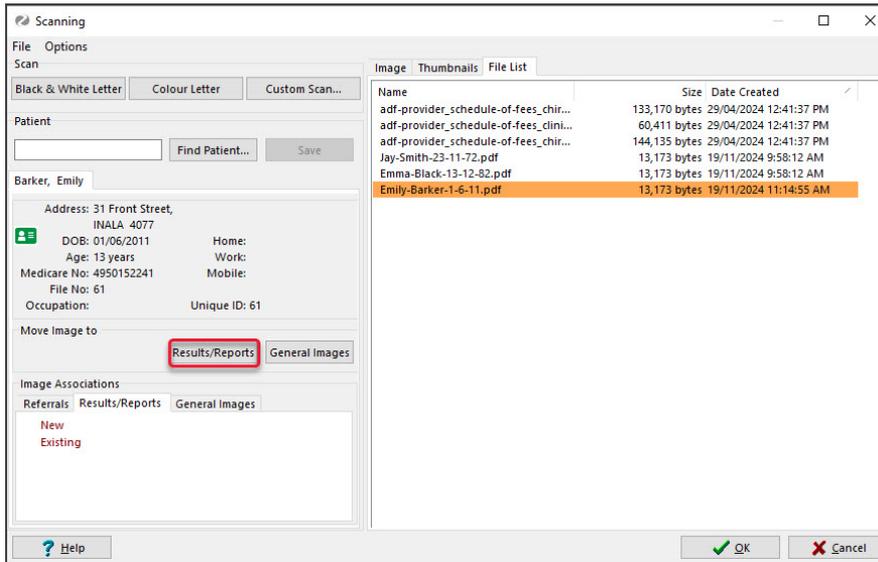
8. Locate the patient and confirm the date of birth matches the file.

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

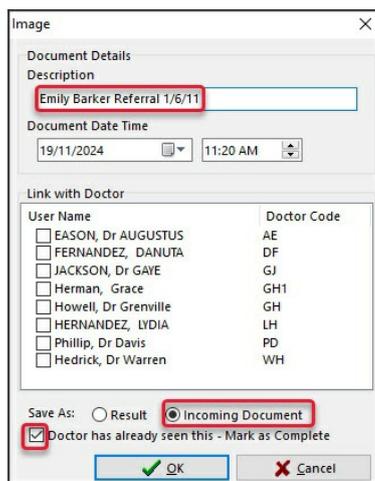   The patient information will be displayed in the Scan tool UI.

10. Select **Results/Reports**.

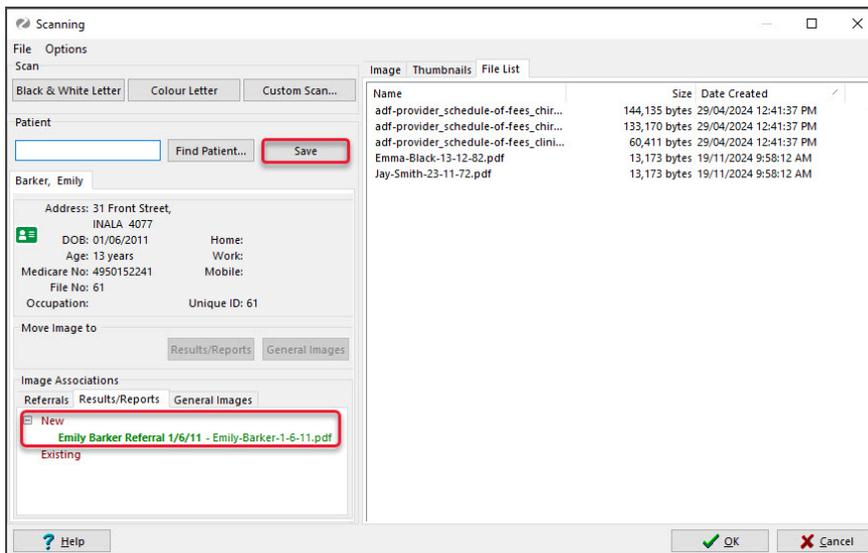   The **Document Details** screen will open.

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).
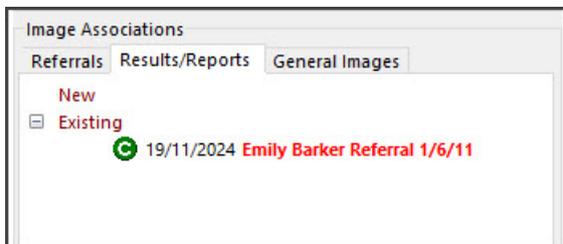   c. Select **Incoming Document.**

12. Select **OK**

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

13. Select the **Save** button.

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

    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.