Search for a Document Using Clinical Document Viewer

Overview

If a document was scanned into a client's chart, you can use the Clinical Document Viewer to search for the documents.

Before You Begin

Prerequisites: You must have the following items configured to search for a document in the Clinical Document Viewer.

- You must have access to the **Clinical Document Viewer** form in **User Definition** or **User Role Definition**.
- You must have the ability to View and Print under the **Document Management** section of **User Definition** or **User Role Definition** forms.

Search for Documents

1. Navigate to the **Clinical Document Viewer** form.

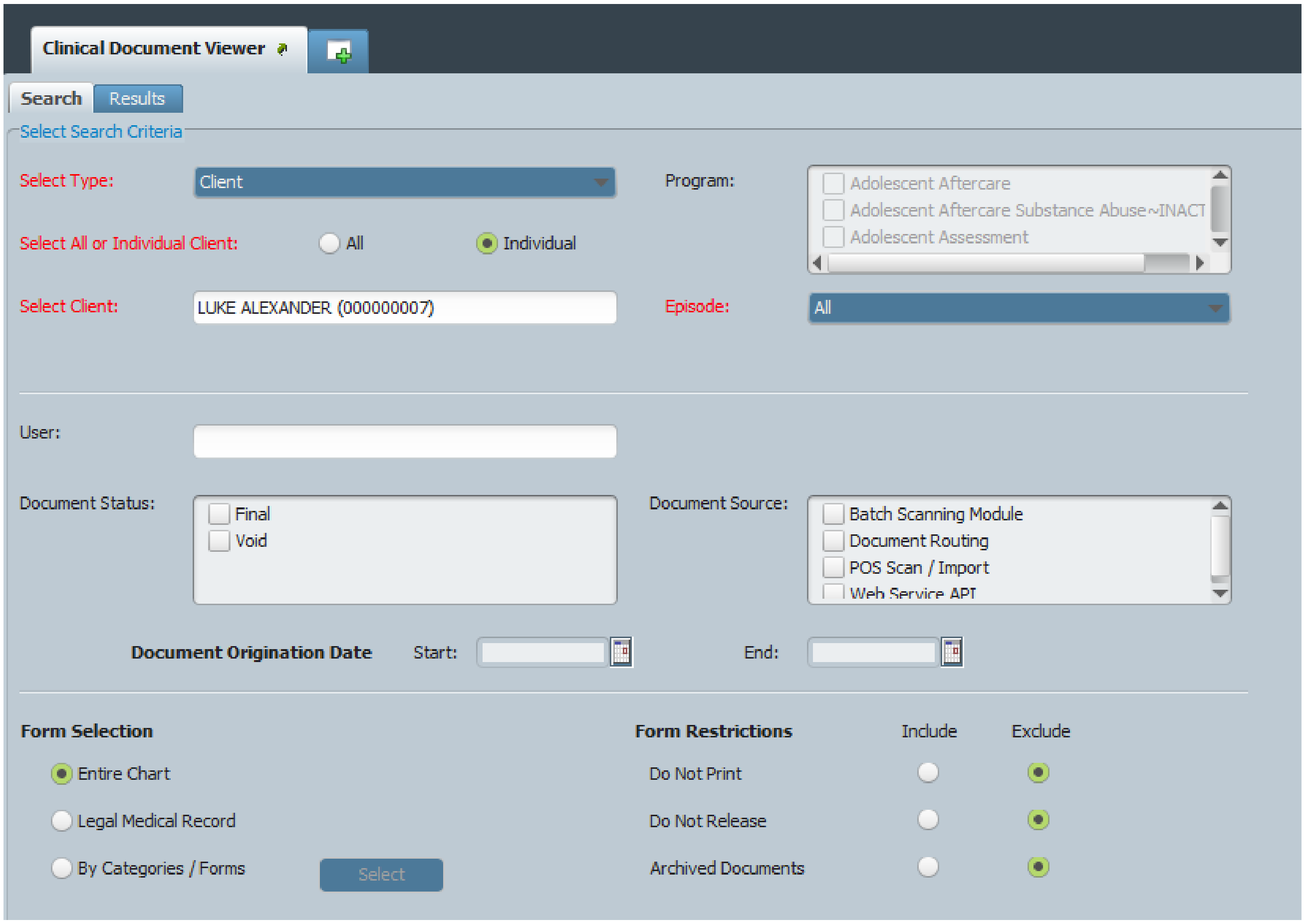
   Note: The PM and the CWS versions of this form are the exact same and you can view all of the same documents.

2. Click **Individual** in the **Select All or Individual Client** field.
3. Type the necessary client ID # or last name into the **Select Client** field. Then select the appropriate episode for the client.
4. Optional. You can filter your search results using any of the following fields.

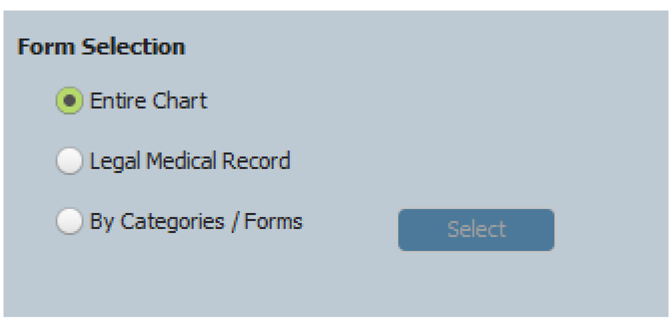
- The **Document Status** field allows you to filter your search results by Final or Void.

  Note: All documents scanned into Avatar are considered Final, unless they have been voided.

- The **Document Source** field allows you to filter the search results by how the document was entered into the system.
- The **Document Origination Date** section, allows you to filter the results by a particular date range
- The **User** field filters the results to the user who captured the document.
- The **Document Status** field allows you to filter your search results by **Final** or **Void** status.

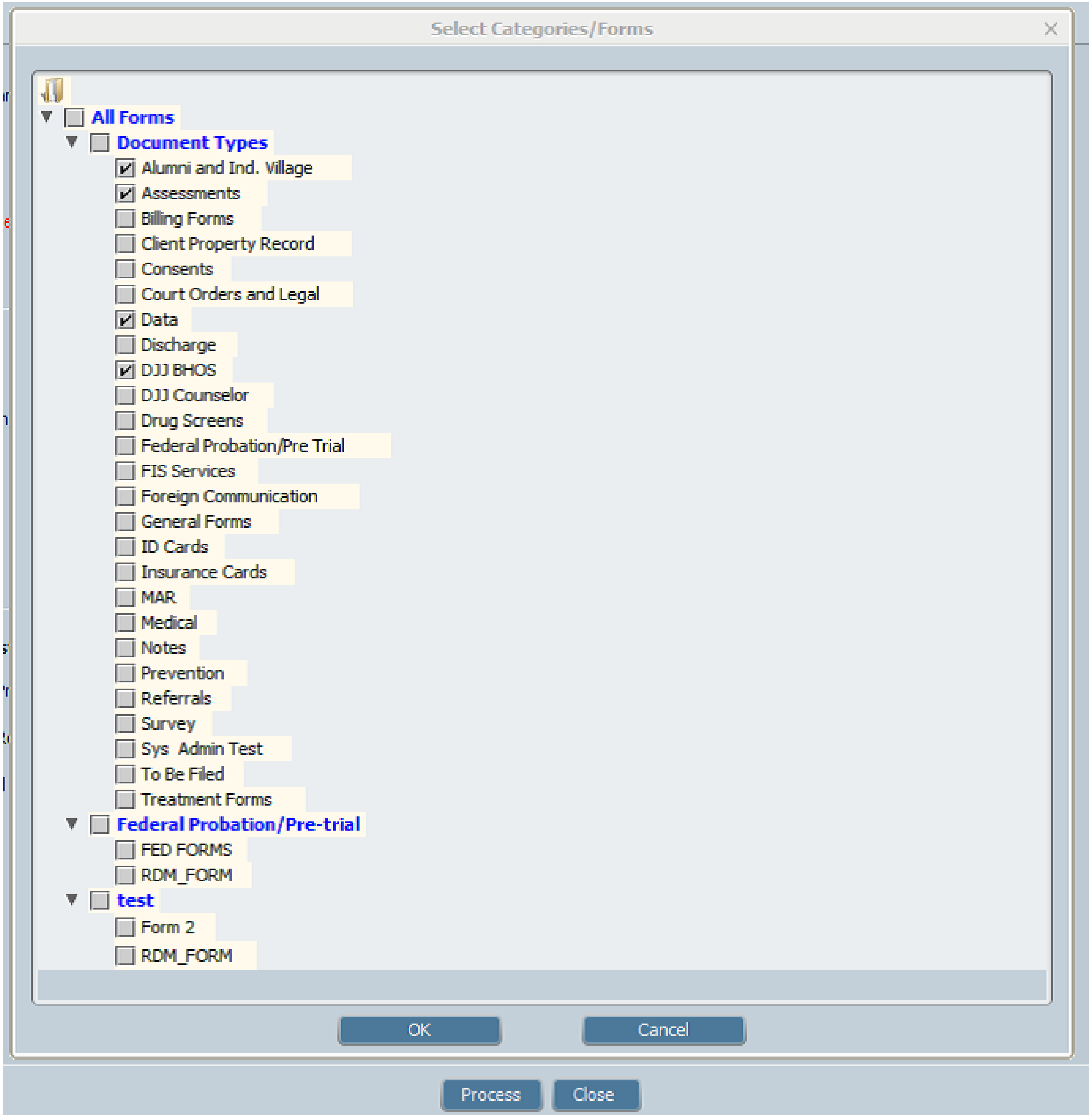


5. Choose an option under **Form Selection**.



- Select **Entire Chart** to view all document types scanned into the client's chart.
- Select **Legal Medical Record** to view all documents types that have been deemed as part of the medical record. This is driven off the "Exclude from the Medical Record" option on the Document Management Definition form.
- Select **By Categories / Forms** to select document types.

System result: If you select **By Categories / Forms** and then click **Select**, a window displays to allow you to filter by document type. Select the appropriate document types and then click **OK.**



Note: If the window is blank or does not show your Perceptive document types, then searching has not been configured. You can fix this in the **Document Management Definition** form.

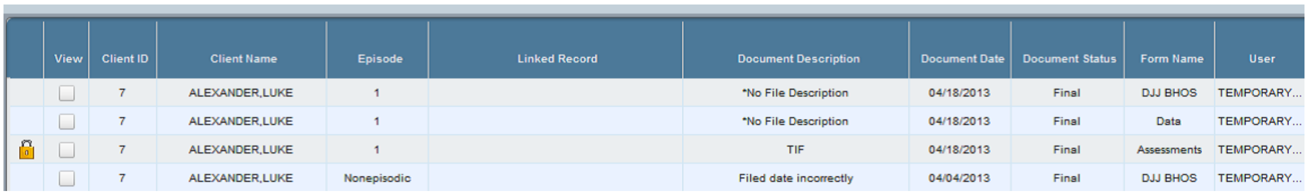
6. Click **Process** at the bottom of the screen.

View a Document

After you search for a document, complete the following steps to view the document.

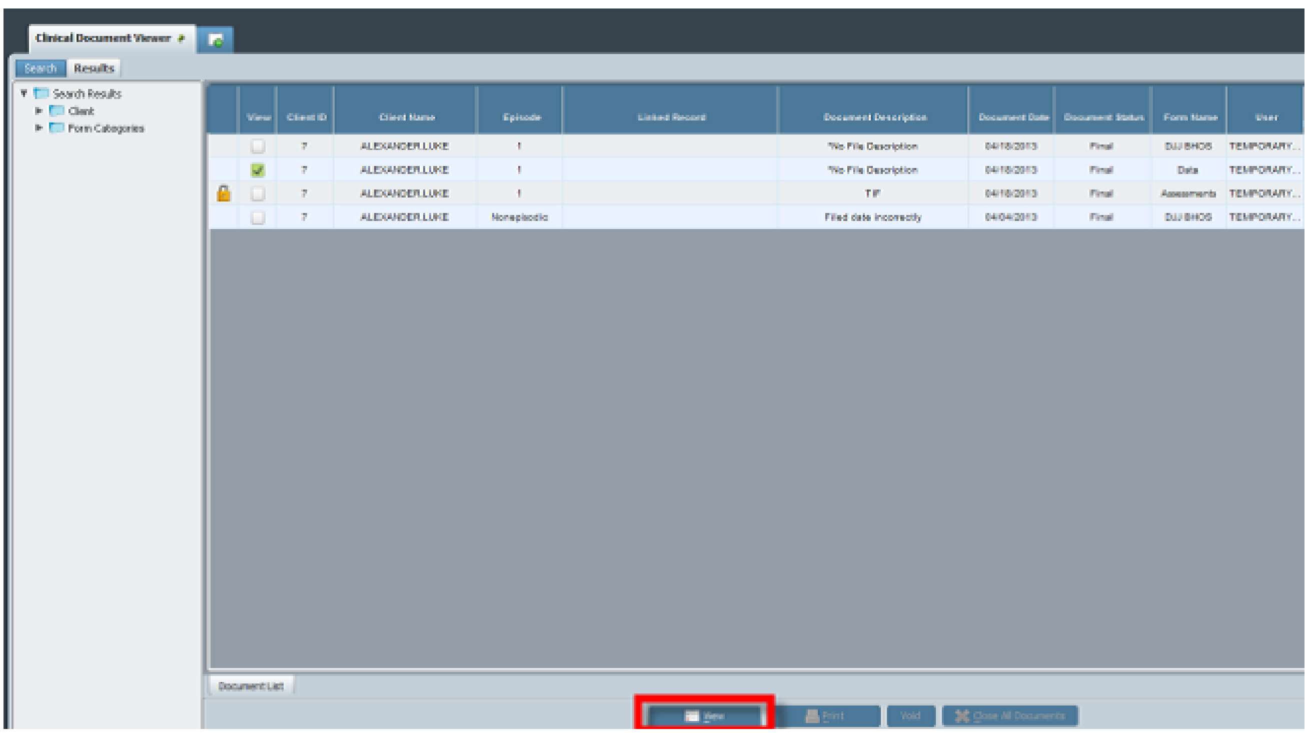
1. After you perform a search and click **Process**, the system displays a **Results** tab where you view the list of documents.

Note: If a padlock appears next to the view checkbox, then your user/user role does not have the ability to view that type of document. In the screenshot below, the user does not have the ability to view any documents scanned into the **Assessment** document type.



	View	Client ID	Client Name	Episode	Linked Record	Document Description	Document Date	Document Status	Form Name	User
		7	ALEXANDER,LUKE	1		*No File Description	04/18/2013	Final	DJJ BHOS	TEMPORARY...
		7	ALEXANDER,LUKE	1		*No File Description	04/18/2013	Final	Data	TEMPORARY...
		7	ALEXANDER,LUKE	1		TIF	04/18/2013	Final	Assessments	TEMPORARY...
		7	ALEXANDER,LUKE	Nonepisodic		Filed date incorrectly	04/04/2013	Final	DJJ BHOS	TEMPORARY...

2. Click the check box in the **View** column for the appropriate document and then click **View** button at the bottom of the screen.



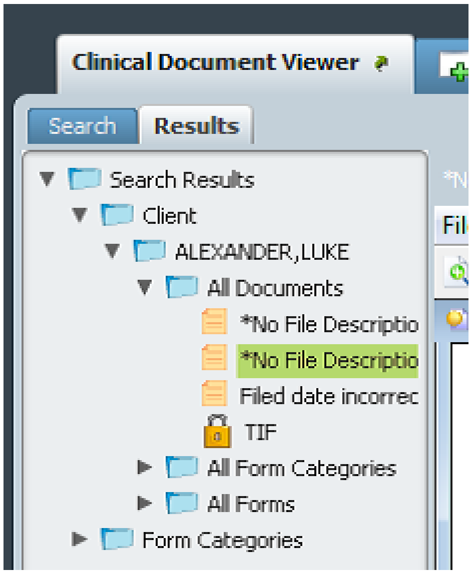
System result: The document loads.

Note: Select the **Print** check box to provide the option print the image. The **Print** button becomes enabled at the bottom of the screen.

Exit the Clinical Document Viewer

1. After you click **View** or **Print**, click on the **Close All Documents** button at the bottom of the screen.

2. Click the **Search** tab in the upper-left corner.



3. Click **Close** at the bottom of the screen to exit the form.