OnBase®
Foundation EP5

Release of Information (Unity)

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

Copyright

Document Name .... Release of Information (Unity)

Department/Group .... Documentation

Revision Number .... Foundation EP5

OVERVIEW

INSTALLATION GUIDE

INSTALLATION

HYLAND OFFICE PRODUCTS INSTALLERS

CONFIGURATION - INTEGRATED MODE

CONFIGURING TEMPLATES

RELEASE OF INFORMATION UNITY SCHEDULER TASKS

USER GUIDE

USAGE - STANDARD MODE

ROI COLUMNS AND SEARCH FIELDS

RIBBON BUTTON DESCRIPTIONS

Overview

Medical facilities are frequently contacted to release patient medical information for a variety of reasons. When a facility is contacted, a specialist creates a Release of Information (ROI) request. Processing ROI requests in a paper-based system requires a large amount of time and resources. ROI requests may require employees to locate, copy, and deliver the requested information to the requester.

With the Release of Information module, these types of requests can be processed electronically and delivered in a fraction of the time. Users can create ROI requests either from scratch within the ROI interface or by using selected charts or documents in the Medical Records Unity Client.

The Release of Information module contains two different modes: standard and integrated.

The mode is determined before configuration can take place and cannot be changed after selection. Overviews of each mode and its features can be found in the following sections:

- Release of Information (Standard Mode)
- Release of Information (Integrated Mode)

Release of Information (Standard Mode)

Upon creating an ROI request within Release of Information (Standard Mode), users can perform the following tasks:

- Assign the request to a specific user
- Attach relevant charts and documents to the request
- Configure a release order for attached documents
- Account for external items that should be delivered with the request
- Submit requests for approval
- Reject the request and print a rejection letter
- Bill the requester
- Record requester payment information
- Generate a PDF packet of the request when it's ready for delivery
- Export the request by printing or saving the PDF packet file
- View request history and properties

Once requests are created, they can be viewed and edited from the ROI layout. Users can also retrieve requests through Request Search, a powerful interface that displays a wide range of search criteria and accepts wildcards.

Using the OnBase Client, administrators can track request actions and user activity. ROI transaction logs allow an administrator to audit a request, while ROI reports allow them to track user productivity. Because productivity should reflect actual time worked on requests, users can place requests on hold if necessary. When a request is placed on hold, it becomes read-only, and recorded time spent working on the request is paused until the hold is removed.

Depending on your licensing, users may also be able to attach relevant documents to a request using the Virtual Print Driver or Report Capture for Meditech.

Release of Information (Integrated Mode)

Integrated Mode is designed specifically to work with an existing ROI system (for example, Epic ROI), so that users can easily locate and release OnBase documents. Upon creating a request within Release of Information (Integrated Mode), users can perform the following tasks:

- Assign the request to a specific user
- Attach relevant charts and documents to the request
- Configure a release order for attached documents
- Generate a PDF packet of the request when it's ready for delivery
- Export the request by printing or saving the PDF packet file
- View request history and properties

Once requests are created, they can be viewed and edited from the Release of Information layout. Users can also retrieve requests through Request Search, a powerful interface that displays a wide range of search criteria and accepts wildcards.

Using the OnBase Client, administrators can track request actions and user activity. ROI transaction logs allow an administrator to audit a request, while ROI reports allow them to track user productivity.

Depending on your licensing, users may also be able to attach relevant documents to a request using the Virtual Print Driver or Report Capture for Meditech.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Release of Information functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

In addition to an enterprise base package license for standard OnBase functionality, the following add-on licenses are required to access standard Release of Information functionality:

- Release of Information
- Document Composition
- Doc - Create PDF / TIFF for this Document
- PDF Framework

For more information on the packages available to you, contact your account manager.

Additional Licensing

Additional licensing may be required to use the following products in conjunction with Release of Information:

- HL7
- Workflow
- Report Capture for Meditech

For the licensing requirements of a specific product, see that product's documentation.

Legacy Licensing

Release of Information requires the following licenses:

- Release of Information
- Document Composition
- Doc - Create PDF / TIFF for this Document
- PDF Framework
- A valid Client license

Some functionality requires additional licenses:

- **HL7 Listener or Basic HL7 Listener** - Allows you to attach charts and documents to a request using the **Add Attachments** wizard. Also allows you to search for existing patient records to automatically update the patient information on a request. In addition, you can create requests from the Medical Records Unity Client using selected charts and documents from Chart Search, Combined View, Encounters, and View Chart.
- **Workflow** - Allows you to create requests from selected charts and documents in the Workflow layout in the Medical Records Unity Client.
- **Virtual Print Driver** - Allows you to attach documents to a request using the Virtual Print Driver.
- **Report Capture for Meditech** - Allows you to attach external system documents to a request.

Check your current licensing status by selecting **Utils** | **Product Licenses** from the Configuration module.

OnBase®
Foundation EP5

Release of Information (Unity)

Installation Guide

Foundation EP5

Requirements

For Release of Information requirements, see the following sections:

- General Requirements on page 6
- ROI Packet Generation Server Requirements on page 6
- Licensing on page 7

The following sections outline requirement information specific to Release of Information in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Release of Information and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Supported Desktop Operating Systems, see the **Unity Client** table column
- Unity Client Platform Hardware Requirements
- Unity Client Browser Requirements
- Microsoft .NET Framework Requirements
- Databases Supported
- Database/File Servers

ROI Packet Generation Server Requirements

The ROI Packet Generation Server is responsible for creating release of information packets. It hosts the ROI Packet Generation service.

The server can be a physical or virtual server, and it must meet the following requirements:

Component	Requirement
Processor	4 Core 3.2 GHz or greater
RAM	8 GB
Operating System	Same as OnBase Application Server
Adobe and Microsoft Office Software	• Microsoft® Word 2010, Microsoft Word 2013, or Microsoft Word 2016 • Adobe® Acrobat Reader®

Component	Requirement
Server .NET / XML / Runtime Libraries	Same as OnBase Application Server

The following storage configuration is recommended. Actual requirements may vary per solution.

Drive	Type	Configuration	Usage	Size
C:	DAS	RAID 1	Operating System	72 GB
D:	DAS	RAID 1	Data Files	50 GB

Licensing

See Licensing on page 2 for licensing requirements.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

Release of Information Upgrade Considerations

The following information should be considered or noted when upgrading Release of Information Unity deployments. Read this information prior to upgrading your version of OnBase.

Server Machine Considerations — The following should be considered with regard to server machines:

- Ensure the version and build of the Medical Records Unity Client match the version and build of the OnBase Application Server.

End-User Workstation Considerations — The following should be considered with regard to end-user workstations:

- Ensure the proper compatible third party applications are installed (e.g., Adobe Acrobat, Microsoft Office).
- Ensure the directory where the Medical Records Unity Client is installed is added to the virus scanner white list.
- Make note of any settings in the Medical Records Unity Client configuration file that have been modified from their default values.
- Ensure that the Application Server URL is correct in the **ServicePath** field of the Medical Records Unity Client configuration file and can be accessed from a web browser. Verify the user does not receive certificate errors and is not prompted for authentication credentials.

ClickOnce Deployment Considerations — The following should be considered with regard to ClickOnce deployments:

- Ensure the environment in which the Medical Records Unity Client will be deployed is not a Terminal Services environment.
- Ensure the workstation environment can allow ClickOnce deployments to be installed.
- Ensure any upgrades are made to existing deployments.

General Deployment Considerations — In addition to the previous considerations, the following should be considered with regard to general deployments:

- As of OnBase 18, the following XML path is no longer supported in Document Composition templates: **//ROIRequest/Inventory/MedicalRecords/MedicalRecord/MRNWithAssigningAuthority**

  Prior to OnBase 18, this XML path was used to display the assigning authority for a patient's MRN. If your solution uses overlapping patient identifiers, make sure Document Composition templates provide sufficient information to distinguish patients who may have matching identifiers.
- Beginning in OnBase 18, the **Group by Patient** option is available in Request Type configuration. This option is selected by default for all Request Types. It applies only to requests where multiple patients are attached and the **Separate by Chart** option is not selected on the release order screen. If a system is upgraded from a version prior to OnBase 18, the release order for documents attached to existing requests is not changed upon upgrade. The **Group by Patient** option takes effect on a day-forward basis.
- Beginning in OnBase 17, packet generation is handled using the Unity Scheduler. It is no longer handled using the ROI Packet Generator and its prerequisites. If you are upgrading from a version prior to OnBase 17, uninstall the previous packet generation components before installing the Unity Scheduler components.
- If you are upgrading from a version prior to OnBase 17, you must upgrade all ROI-related components, and all users must be on the same version. In OnBase 17 and later, Release of Information cannot be run in parallel with a version prior to OnBase 17.

- If you are upgrading from a version prior to OnBase 17, ensure there are no requests with a status of Pending Packet. The Unity Scheduler service will not generate packets for requests that became ready for packet generation prior to OnBase 17.
- If you are upgrading from a version prior to OnBase 17, Document Composition templates that use the **//ROIRequest/Patient** node must be modified to use the **//ROIRequest/Inventory/MasterPatientIndexes** node or the **//ROIRequest/Inventory/MedicalRecords** node to access the attached patients' data. Patient data will not be populated for placeholders using the **//ROIRequest/Patient** node.
- If you are upgrading from a version prior to OnBase 17 and your solution uses overlapping MPIs or MRNs, then you must cancel in-progress requests and re-create them after the upgrade. Otherwise, placeholders on composed documents might not be populated for the in-progress requests.

Installation

The Release of Information module requires installation of the following components:

Component	Instructions
OnBase Application Server	Install on a standalone server. For information about installing the OnBase Application Server, see the **Application Server** module reference guide.
OnBase Medical Records Unity Client	Install on users' workstations. For information about installing the Medical Records Unity Client, see the **Medical Records Unity Client** module reference guide.
Template Builder	Install on workstations where administrators will configure templates for system-generated documents. For information about installing the Template Builder, see Hyland Office Products Installers on page 16.
Unity Management Console	Install on a server or workstation where administrators will configure the packet generation task. The console also allows administrators to remotely or locally monitor the ROI Packet Generation service. For more information, see Installing the Unity Management Console on page 10.
Unity Scheduler	Install on a standalone server where ROI packets will be generated. The Unity Scheduler is used to run the ROI Packet Generation service. For more information, see Installing the Unity Scheduler on page 10.

Installing the Unity Management Console

The Unity Management Console installer installs the Unity Management Console, which is required to configure and manage schedules and tasks. The Unity Management Console can be installed on the same server or a different server from the Unity Scheduler and the ROI Packet Generation service.

For information about installing the Unity Management Console, see the **Unity Scheduler** module reference guide.

Creating the ROI Packet Generation Task

The ROI packet generation task generates packets for ROI requests. The task is configured using the Unity Management Console. The task is executed using the ROI Packet Generation service, an instance of the Unity Scheduler running on a standalone server.

To configure the ROI packet generation task, see Release Of Information Unity Scheduler Tasks on page 299.

Installing the Unity Scheduler

The Unity Scheduler is responsible for running the ROI Packet Generation service, which executes the ROI packet generation task. The Unity Scheduler must be installed on any server that needs to run the ROI Packet Generation service. Multiple instances of the ROI Packet Generation service can run concurrently on multiple servers.

You can create the ROI Packet Generation service using the following methods:

- If you know the name of the task group containing the ROI packet generation task, then you can create the ROI Packet Generation service when you run the Unity Scheduler installer.
- You can create the ROI Packet Generation service using the command line after running the Unity Scheduler installer.

Note: Be sure to enable automatic startup when creating the ROI Packet Generation service. If the service is installed on a different server from the OnBase disk groups, then the service must run under a Windows user account with sufficient access to the disk groups.

For information about installing the Unity Scheduler and creating a service using the command line, see the **Unity Scheduler** module reference guide.

INI Settings

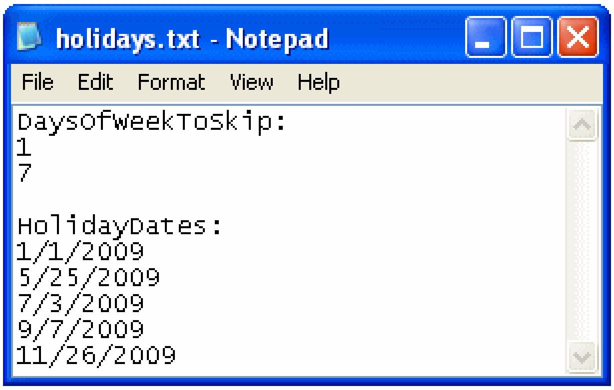
By default, the ROI Release Request and User Productivity reports include weekends and holidays in the total processing time for ROI requests.

You can configure OnBase to exclude non-business days from ROI processing time two ways. The recommended method is using a Business Calendar that you configure in OnBase Configuration and assign under **Medical | Release of Information | System Settings**.

If no Business Calendar is assigned, OnBase will refer to the onbase32.ini file for days to exclude from processing time. The following steps guide you through the latter method. First, you will create a text file that lists the days to exclude. Then, you will add the file's location to onbase32.ini.

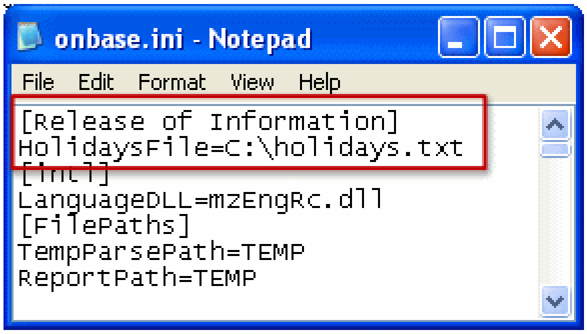
1. Create a text file that includes the following lines:
   ```
   DaysOfWeekToSkip:
   HolidayDates:
   ```
2. Under **DaysOfWeekToSkip:**, list the numbers corresponding to the days of the week you want to exclude from ROI processing time. The format is **1** for Sunday, **2** for Monday, **3** for Tuesday, and so on.

   For example, to exclude Sundays and Saturdays, type **1** on the first line and **7** on the next line.
3. Under **HolidayDates:**, list the specific dates you want to exclude from ROI processing time. The format is M/D/YYYY. When you're finished, the file should resemble the following:



4. Save this file to a location that can be accessed from the workstation that will be generating ROI reports.
5. Open onbase32.ini from the workstation that will be generating ROI reports. The INI file's location varies depending on the workstation's operating system. See the following section, INI File, for the file's default location on each operating system.
6. Find the **Release of Information** section in onbase32.ini:
   ```
   [Release of Information]
   HolidaysFile=
   ```

7. Next to **HolidaysFile=**, type the full path where you saved the text file in step 4. When you're finished, the new section should resemble the following:



Save onbase32.ini. The next time a User Productivity or Released Requests report is generated, the days and dates you entered will be excluded from the request processing time.

INI File

INI files (initialization files) are plain-text files that contain configuration information. These files are used by Windows and Windows-based applications to save and access information about your preferences and operating environment. OnBase uses an initialization file named onbase32.ini. If users do not have rights to access the onbase32.ini file, they will be unable to use the Client or the Configuration module.

The onbase32.ini file is primarily used to store settings specified in the Client or the Configuration module. For example, when a user selects a default data source in the OnBase Client's Workstation Options dialog box, this selection is saved to the onbase32.ini file. The onbase32.ini file is also used to make modifications to OnBase modules that cannot be made through the module's interface.

Location

For modern Windows operating systems, the default location of the onbase32.ini file is **C:\ProgramData\Hyland Software**. For previous versions of OnBase running on older operating systems, the default location of the onbase32.ini file was **C:\Documents and Settings\All Users\Application Data\Hyland Software**.

Note: To maintain backwards compatibility with previous versions of OnBase, OnBase checks the workstation's **C:\Windows** folder for the OnBase INI file if it is not found in the folder specified above. If the OnBase INI file is found in the **C:\Windows** folder, OnBase copies the file to the new location. The previously existing version of the OnBase INI file remains in the **C:\Windows** folder, but it is no longer used by OnBase.

Your onbase32.ini file may reside in a different location, if that location is specified by the following command line switch on the OnBase Client shortcut target:

-INIFILE= "full path\filename", where **full path** and **filename** are replaced by the specific path and file name.

If this command line switch is not used and you move or rename your onbase32.ini file, OnBase recreates the file in the default folder and ignores the newly created file.

INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment

In Remote Desktop environments, a remote session is established in which the user is running applications that are not installed locally. This presents a challenge when an application, such as OnBase, requires a user-specific INI file to establish unique settings. In a Remote Desktop environment, you must ensure that each user has a single, unique INI file to make sure any user-specific settings are consistent for that user.

Note: The default location of the OnBase INI file is not unique in a Remote Desktop environment.

To ensure that the INI file is accessible by OnBase and unique to each user in a Remote Desktop environment, the **-INIFILE** command line switch must be applied to the OnBase Client and Configuration shortcuts and be set to a unique location for the INI file.

Note: Additional details regarding the deployment of OnBase in a remote desktop environment is discussed in detail in the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available from your first line of support.

Editing the INI File

Users with the **Configuration** product right can open the onbase32.ini file from the OnBase Client by selecting **Admin | Utilities | Edit INI File**. When multiple onbase32.ini files exist, opening the onbase32.ini file from the OnBase Client ensures that a user is editing the correct onbase32.ini file instance. In most cases, this will be the onbase32.ini file residing in the default directory described above. If an alternate location for the onbase32.ini file is specified by the **-INIFILE** command line switch, the file in the specified location will be opened.

System Interaction

The following sections describe other OnBase features and modules that interact with Release of Information. For more information about each module, please refer to the module's module reference guide or help file.

Medical Records Unity Client

The Medical Records Unity Client offers centralized access to patient information, providing the ability to streamline processes involved in preparing a patient chart for processing.

Report Capture for Meditech

On systems licensed for Report Capture for Meditech, users can attach documents from external systems to an ROI request created in the Medical Records Unity Client.

For more information on attaching external system documents to a request, see ROI and Report Capture for Meditech on page 417.

Virtual Print Driver

On systems licensed for the Virtual Print Driver, users can attach incoming documents printed with the Virtual Print Driver to an ROI request created in the Medical Records Unity Client.

For more information on attaching documents printed with the Virtual Print Driver to a request, see ROI and the Virtual Print Driver on page 408.

Troubleshooting

The following are issues you could encounter while using the Release of Information module in the Medical Records Unity Client.

Packet Not Generated

Issue: The ROI Packet Generation service does not generate the PDF packet.

Resolution: Several factors could be causing this issue. Check the Diagnostics Console and the request history for errors.

For example, if the Diagnostics Console displays the following error, then the request contains a PDF that requires a password to open the document.

- This document requires authentication (e.g. a password). Error number: 1073938471] Error Code: [1073938471: 0x40030027]

Packet Generation Is Slow

Issue: The ROI packet containing PDF documents is being generated very slowly. No exception dialogs are displayed, and no errors are displayed in the Unity Management Console or the Diagnostics Console.

Resolution: When this occurs, consider upgrading your version of Adobe Reader. Some older versions of Adobe Reader can cause slower performance with ROI packet generation, in some cases causing the packet generation process to take much longer than it would otherwise.

Also check whether the ROI request contains large PCL documents. PCL documents containing a large number of pages (e.g., hundreds or thousands) may adversely affect the performance of request packet generation. If possible, break up large PCL documents into smaller documents with fewer pages.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

Hyland Office Products Installers

Overview

The Hyland Office Products installers are used to install the OnBase integration modules for Microsoft Office.

The following functionality is included in the installers and can be installed independently of each other:

- Office Add-In for Microsoft Word
- Office Add-In for Microsoft PowerPoint
- Office Add-In for Microsoft Excel
- Report Services Excel Add-In for Microsoft Office
- Integration for Microsoft Outlook
- WorkView Integration for Microsoft Outlook
- Template Builder

For complete details regarding the functionality and configuration of any of the modules included in the Hyland Office Products Deployment installer, or for any additional installation steps required to install and use the module on the client machine, refer to the module reference guide for that module.

Note: If you would like to include a default Auto Import folder configuration with Microsoft Outlook deployments, see Outlook Folder Configuration Utility on page 61 before running the installer.

Deployment Options

The Hyland Office Products installer is distributed as a ClickOnce deployment installer or as a standard executable installer (MSI). While either installer can be used to install the same functionality, the following differences should be considered when deciding which installation option is best for your organization:

ClickOnce installer	Standard (MSI) installer
After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce.	Prerequisites are installed automatically as long as the **setup.exe** executable is used for installation.
Deployment packages can be installed on the local workstation by any user with rights sufficient to access the deployment package on the deployment server.	The installer must always be run on the local workstation by a user who is an Administrator on that workstation.
Deployment packages can be updated to a new version without first uninstalling the module from each workstation. The new version is automatically updated on each workstation the next time the module is accessed.	In order to upgrade to a new version, the old version must be uninstalled from each workstation before the new version can be installed.
Microsoft Office documents opened using the Web Client cannot be revised using the Office Business Application modules if those modules were deployed using ClickOnce.	Microsoft Office documents opened using the Web Client can be revised using the Office Business Application modules if those modules were installed using the standard (MSI) installer.
A new instance must be created for different language and culture settings, and those settings are applied to all users who access that deployment instance.	Language and culture settings can be changed for each workstation installed to.
Document Templates cannot be used in the Web Client with the Office Business Application modules if those modules are installed using the ClickOnce installer.	Document Templates can only be used in the Web Client with the Office Business Application modules when those modules are installed using the standard installer (MSI).

ClickOnce installer	Standard (MSI) installer
The ClickOnce installer cannot be used to install the 64-bit Hyland Office add-ins.	The 64-bit versions of the Hyland Office add-ins for Microsoft Office can be installed using the standard installer (MSI) for 64-bit environments.

Note: You cannot install some components using ClickOnce and others using the standard (MSI) installer. Once you have installed a component, that same deployment method must be used to install additional components.

This chapter covers installation using either method:

- Installation Using ClickOnce on page 21
- Installation Using the Standard (MSI) Installer on page 59

Microsoft Office 2019 Support Statement

While OnBase supports the 32-bit and 64-bit versions of Microsoft Office 2019, Hyland Software recommends that customers only install the 32-bit version of Microsoft Office 2019. For most users, the 64-bit version of Microsoft Office 2019 does not provide additional performance benefits.

Microsoft provides the following guide to assist with choosing the correct version of Microsoft Office for your organization (http://support.office.com/en-us/article/Choose-the-32-bit-or-64-bit-version-of-Office-2dee7807-8f95-4d0c-b5fe-6c6f49b8d261?CorrelationId=165c464e-6fb1-4532-83ad-7537787fd680&ui=en-US&rs=en-US&ad=US).

Separate versions of the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules are available that support the 64-bit version of Microsoft Office 2019. The 64-bit versions of these modules have limited functionality, though, due to some components which are not 64-bit compatible.

The following are limitations when using the 64-bit versions of the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules:

- The ClickOnce installer is not supported.
- The embedded Unity Document Viewer cannot display Microsoft Office documents. The Office Business Application for 2019 will be used to open all Microsoft Office documents. The Office Business Application for 2019 is required to view Microsoft Office documents from the Integration for Microsoft Outlook 2019.
- Topaz signature pad functionality, which is part of the Signature Pad Interface module, is not available.
- Document scanning and acquisition is not available.
- The Document Composition preview window, which may be displayed after composing a new document using the Document Composition module, is not available.

- **Send To | Mail Recipient** functionality using the Novell GroupWise email client is not available.

Caution: OnBase does not support mixed 32-bit and 64-bit Microsoft Office installations with the Office Business Application for 2019 and Integration for Microsoft Outlook 2019 modules.

Microsoft Office 365 Support Statement

In order for the OnBase Office integrations to function in a Microsoft Office 365 environment, the Office 365 subscription must include a desktop-based version of Microsoft Office that is also supported by OnBase. OnBase does not have any integrations for Office Online.

Office 365 subscribers are automatically updated to the latest version of Office when it becomes available. Before this update is applied, they must ensure that they are using a version of OnBase that supports this latest version of Office. At the same time, it is recommended that Office 365 subscribers contact their solution providers to discuss any licensing updates that may be required to support their Integration for Microsoft Outlook, Office Business Application, and WorkView Integration for Microsoft Outlook solutions on the latest version of OnBase.

Microsoft Updates to Microsoft Outlook

After applying a Microsoft update to Microsoft Outlook, the Auto-Import Folder Configuration information for the Integration for Microsoft Outlook can be lost. If this is the case, the integration tool bar and ribbon are still displayed, and ad-hoc importing is successful, but user-specific Auto-Import Folder Configuration options are missing.

This issue is caused by the installation of Outlook-specific updates from Microsoft. These updates cause a new sub-directory to be created within the original installation directory (in a ClickOnce deployment, this is the location of the deployed integration on the client machine, not on the deployment server). After the update, Outlook uses this new sub-directory as the location of the **user.config** file, which contains the user-specific Auto-Import Folder Configuration information. However, the new sub-directory does not contain the original Auto-Import Folder Configuration information for the user. Instead, a new default **user.config** file that contains no customized settings is used in place of the original.

To resolve this issue, copy the original **user.config** file from the original installation directory and paste it into the new sub-directory created by the Outlook update from Microsoft. After replacing the new **user.config** file with the original, user-specific file and re-launching Outlook, Auto-Import Folder Configuration should be restored.

In a ClickOnce deployment, where the Auto-Folder Configuration information is set in the deployment package and cannot be changed by users, you could also create an updated deployment package and redeploy the integration to the client machines.

Requirements

The Hyland Office Integrations installed require the OnBase Application Server. Before running the Hyland Office Products installer, make sure that the OnBase Application Server is installed (see the **Application Server** module reference guide for installation instructions).

The Hyland Office Products installer must be run on systems that support the Windows® Installer 2.0 architecture.

The following sections outline requirement information specific to Release of Information in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Release of Information and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Microsoft .NET Framework Requirements
- Server C++ Requirements

User Permissions

You must be logged on to the installation machine with administrator privileges in order to use the Hyland Office Products installer.

Note: The Hyland Office Products installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

If you are installing a deployment package to be delivered to a client workstation using ClickOnce, any user on the client workstation can install the deployed package as long as they have sufficient rights to access the package on the deployment server.

Client Machine

Microsoft Visual Studio 2010 Tools for Office Runtime must be installed on client machines prior to deployment. **Microsoft Visual Studio 2010 Tools for Office Runtime** can be obtained from the Microsoft Download Center at http://www.microsoft.com/downloads. The x86 version is required for 32-bit versions of Windows; the x64 version is required for 64-bit versions of Windows.

Note: Microsoft Visual Studio 2010 Tools for Office Runtime can also be installed by the **Hyland Office Integration Dependencies** installer for ClickOnce deployments, or by using setup.exe to run the MSI installer for the Office Business Application module.

Installation Using ClickOnce

The **Hyland Office Products Deployment** installer is used to install the ClickOnce deployment packages for several modules on the deployment server (see Overview on page 16). The deployment package is then accessed by client machines to install the module on the client machine.

Note: After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the Office integration packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce. See Additional Installation on page 53.

The Hyland Office Products Deployment installer can be run from an installation CD or a local drive.

Note: You must be appropriately licensed for all modules and functionality installed. You can install, but cannot use, modules for which you are not licensed.

Overview

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\"my value\" INSTALL_PROPERTY_2=\"my value 2\""**.

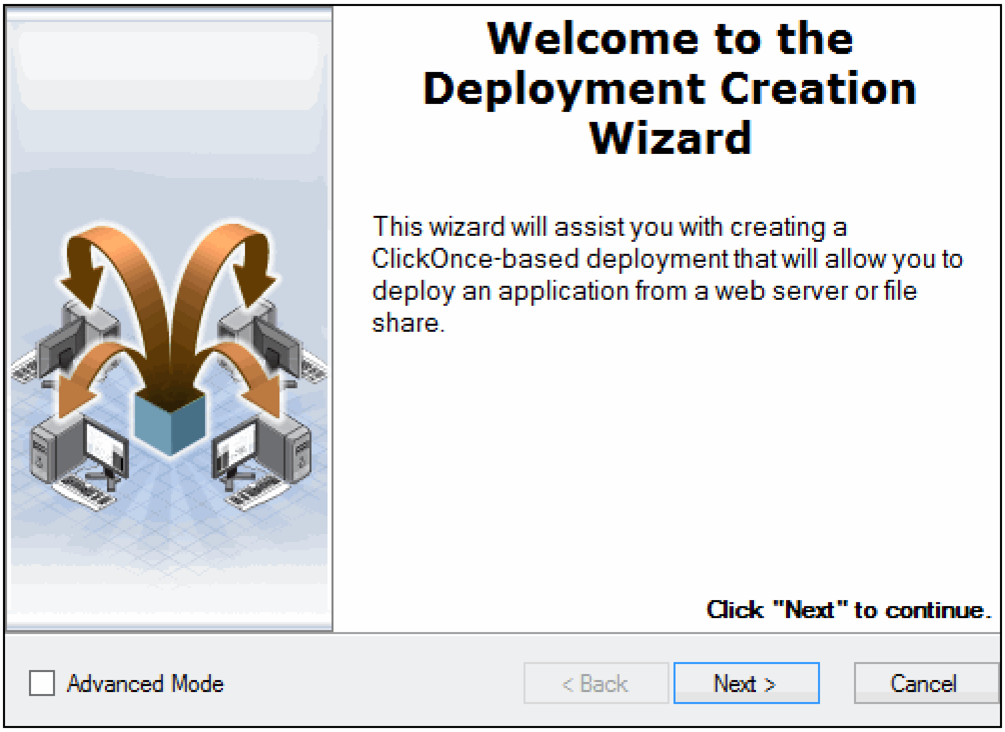
Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

General Installation Options

To run the Hyland Office Products Deployment Installer:

1. Execute setup.exe with administrator privileges. This can be done by right-clicking on the file name and selecting **Run as administrator**. This executable is usually located in the **\ClickOnce\Office Products** folder of your source installation files.
2. The **Ready to Install** dialog box is displayed. Click **Install**.

3. Click **Launch** or **Finish**, depending on the module being installed. The **Welcome to the Deployment Creation Wizard** dialog is displayed.



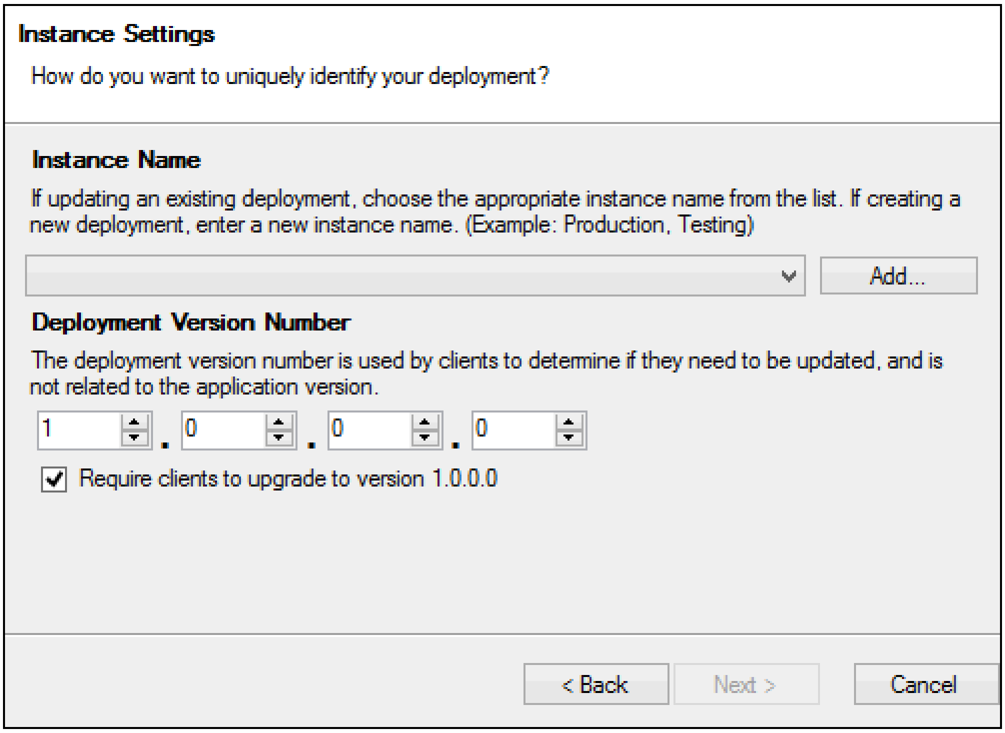
Select **Advanced Mode** to enable the ability to update certain aspects of the installation where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

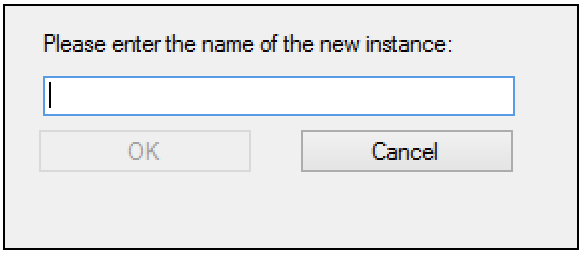
Note: If your servers are configured to use an HTTPS binding, or you are going to enable Active Directory or LDAP Authentication, you should enable **Advanced Mode** in order to be able to configure these options in your deployment.

4. Click **Next**. The **Instance Settings** dialog box is displayed.

Note: If the **Package Selection** dialog box is displayed, select the package to deploy then click **Next** to reach the **Instance Settings** dialog box.



5. Select the name of the application instance from the drop-down list under the **Instance Name** section. To create a new instance name:
   a. Click the **Add** button to the right of the drop-down list. The **Create New Instance** dialog box is displayed.



Note: If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

Note: The instance name cannot contain any of the following characters: **[ ] < > , ; : + = " / \ | ? * # '**

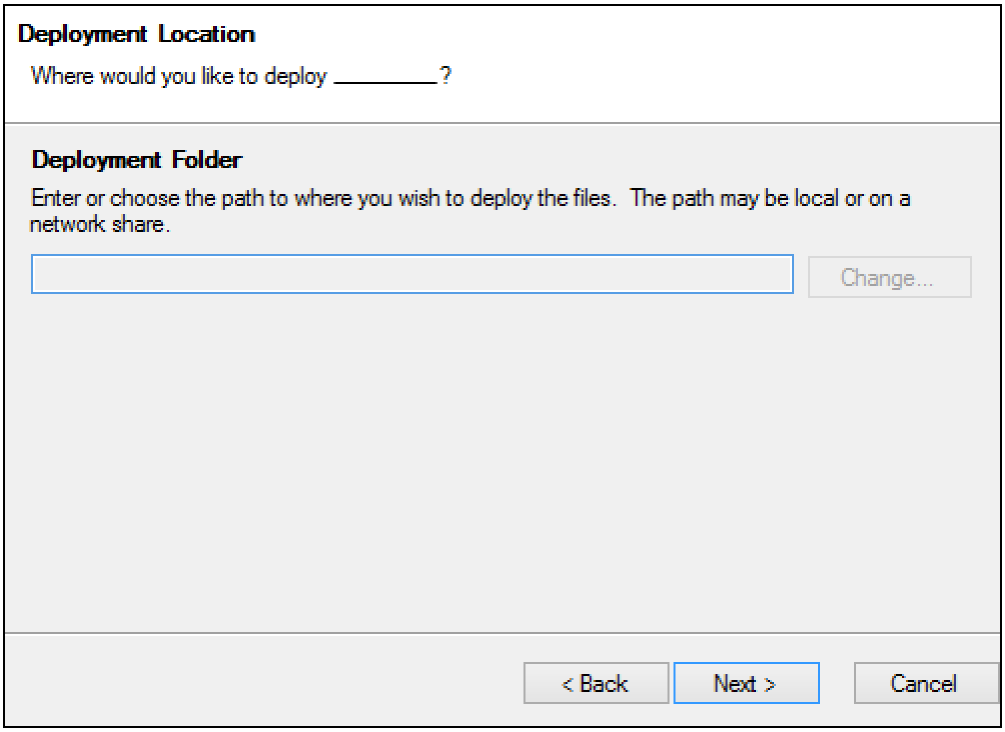
c. Click **OK**.

6. The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.

   The **Deployment Version Number** is incremented automatically by the deployment wizard. The initial Deployment Version Number is **1.0.0.0**, and there is no need to change this number.

Note: The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

7. Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
8. Click **Next**. The **Deployment Location** dialog box is displayed.

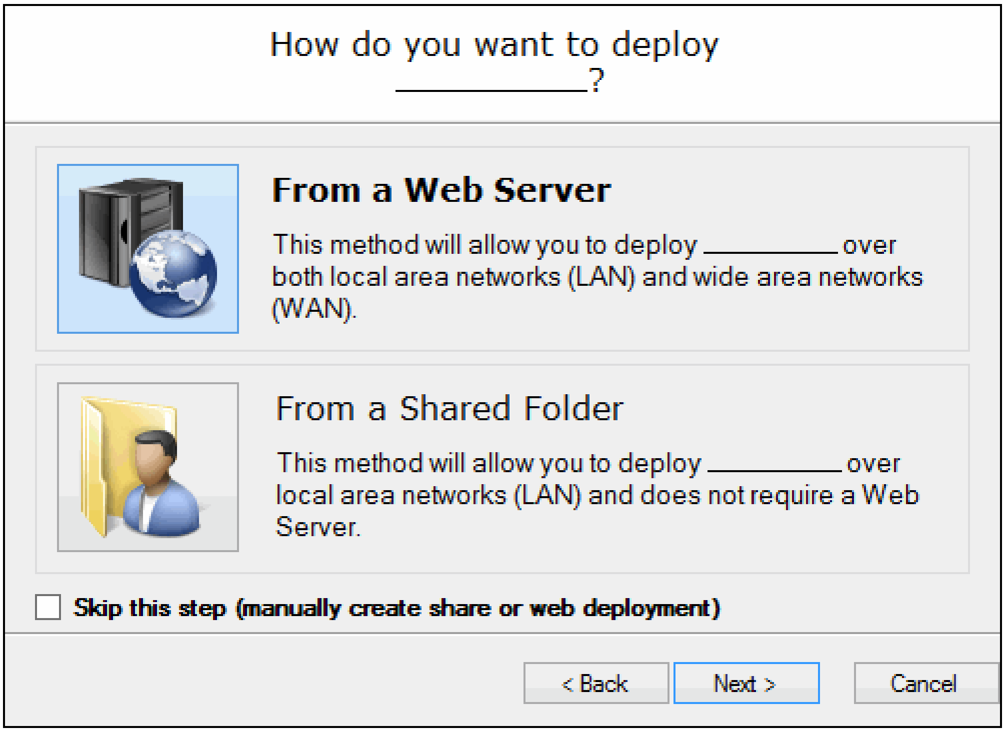


9. Click **Change** beside the **Deployment Folder** field to select a different folder. The **Deployment Folder** can be a local path or network location and is the folder to which the application files are copied on the deployment server.

Note: If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines with the new Deployment Folder location.

Caution: Files in the **Deployment Folder** selected are overwritten.

10. Click **Next**. The **How do you want to deploy...?** dialog is displayed.



11. Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., **https://web-server/Application/DeployedApp.application**).

Note: If IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., **\\machine-name\Application\DeployedApp.application**).

Note: The **From a Shared Folder** option is not available if deploying to a network location (e.g., \\MyServer\MyShare).

Select **Skip this step** to configure the deployment folder manually as a shared folder or a virtual directory.

12. Click **Next**.
    - For **Web Server** installations, go to the Web Server Installation Steps.
    - For **From a Shared Folder** installations, go to the From a Shared Folder Installation Steps.
    - If **Skip this step** is selected, go to the Manually Created Share Steps.

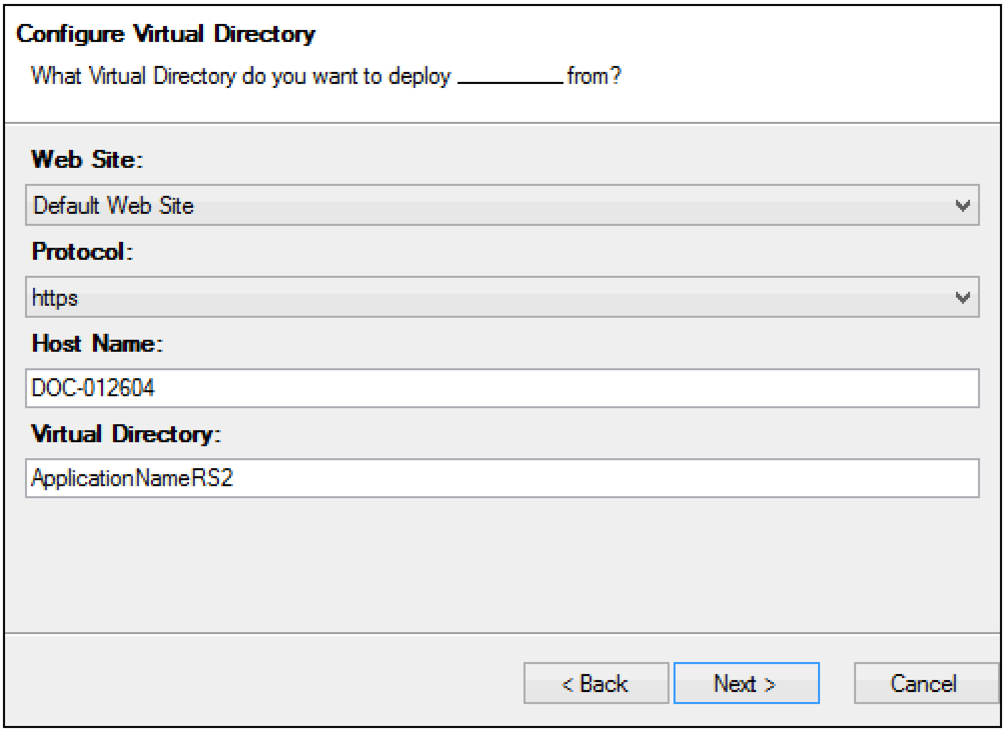
Web Server Installation Steps

If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

After selecting **Web Server** at the **How do you want to deploy...?** dialog box, the **Configure Virtual Directory** dialog is displayed:



1. Select the **Web Site** to create the virtual directory under from the drop-down list.

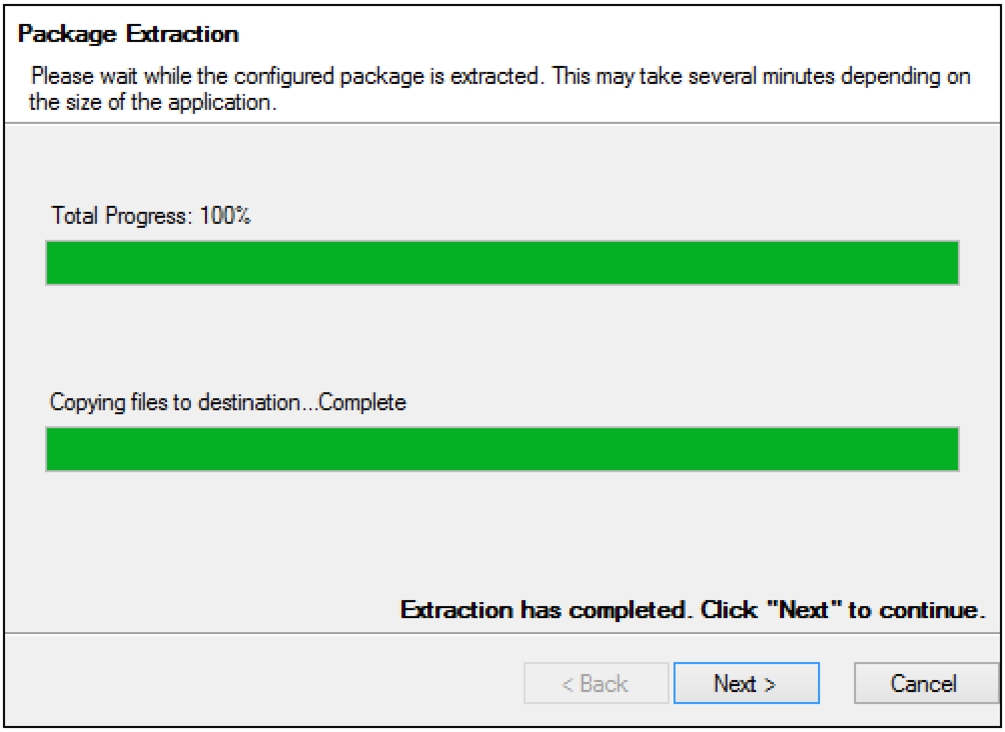
Note: The application generated by the deployment wizard uses the security settings from the Default Web Site in IIS.

2. Select a **Protocol** from the drop-down list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.
3. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with an HTTPS binding, the default value may need to be changed to match the host name in the certificate.

   To specify a port to use for this connection, include the port number in the host name: **<host name>:<port>** (e.g., **DEV-007832:82**).
4. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the Web server selected.

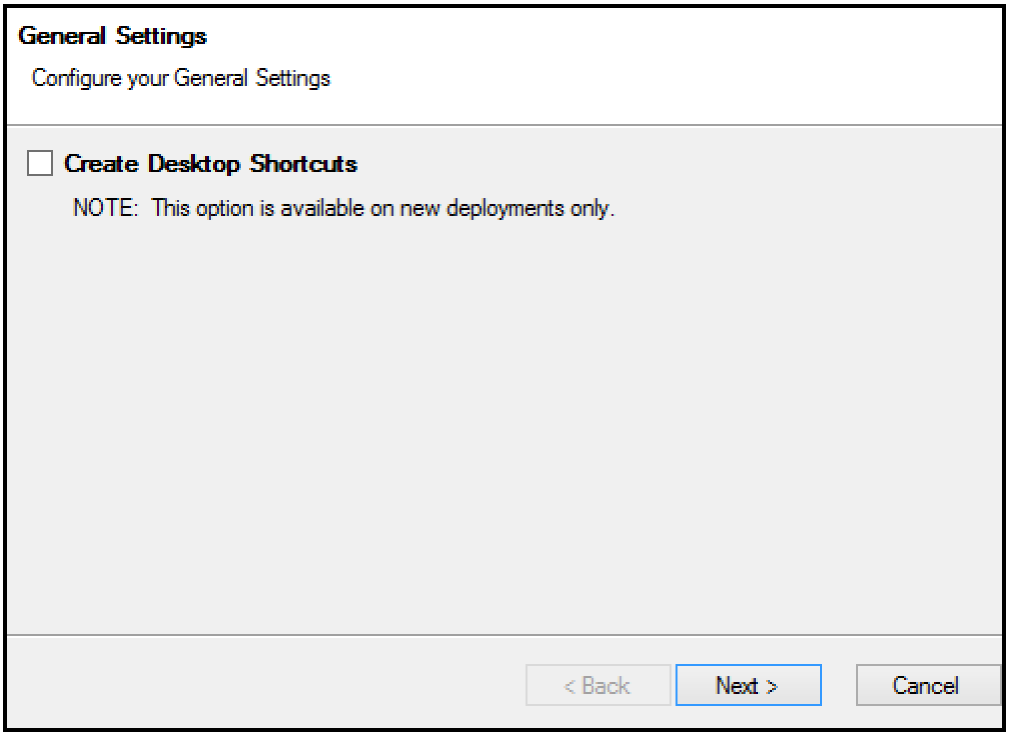
Note: If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** configured. The following special characters cannot be used in the Virtual Directory name: **\ ? ; : @ & = + $, | " < > ***.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

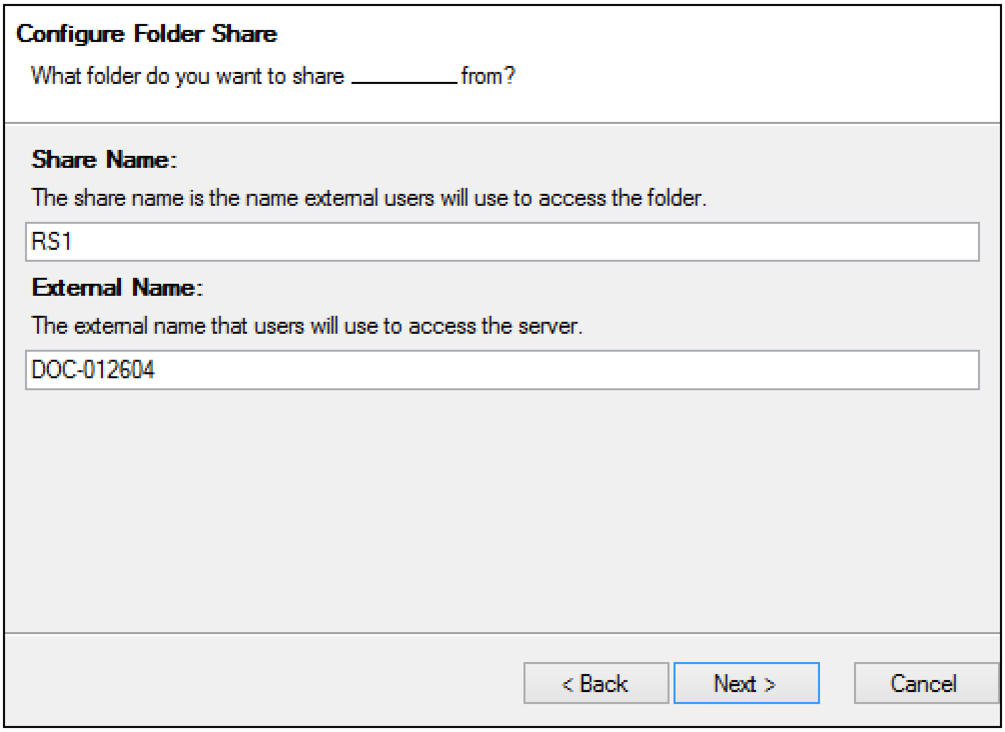
Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **From a Shared Folder Installation Steps** or **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

From a Shared Folder Installation Steps

If you selected **From a Shared Folder** at the **How do you want to deploy...?** dialog, the **Configure Folder Share** dialog is displayed:



Note: Read access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation for deployments installed to a UNC location.

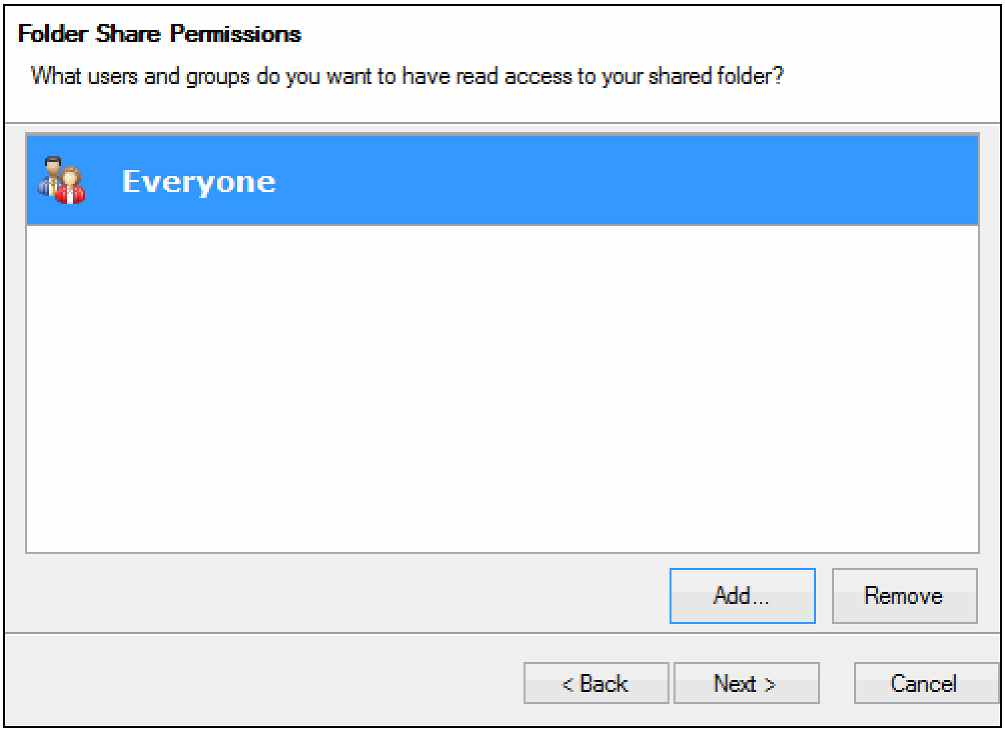
1. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

Note: The **Share Name** must be unique. You cannot enter the name of an existing share.

2. Enter the **External Name** of the server hosting the **Deployment Folder** configured, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

Note: The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog.

3. Click **Next**. The **Folder Share Permissions** dialog is displayed if you are installing the deployment to a local drive (e.g., **C:**):

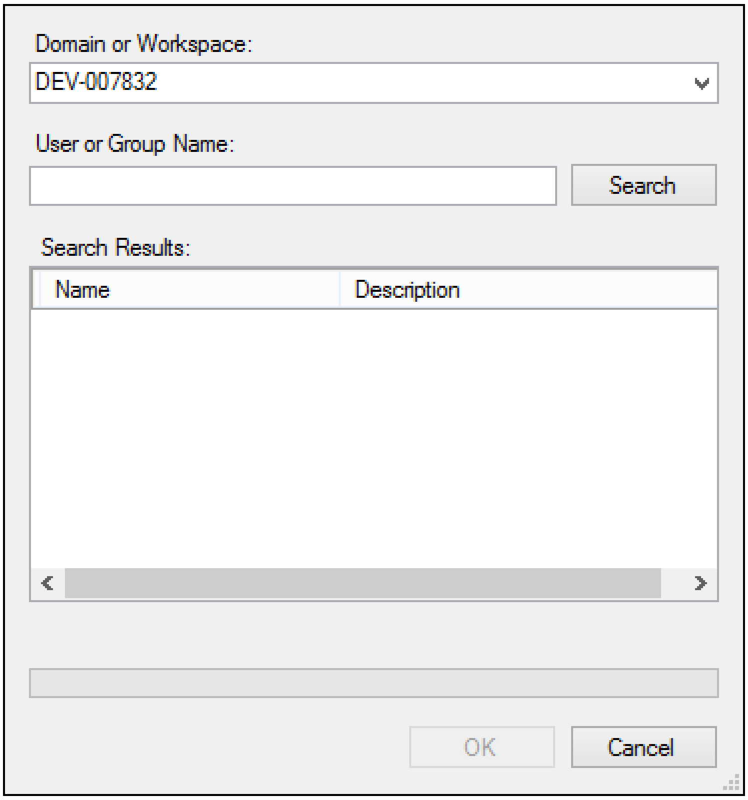


This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

Note: Read access is required for users to be able to install and upgrade the deployed application.

4. Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

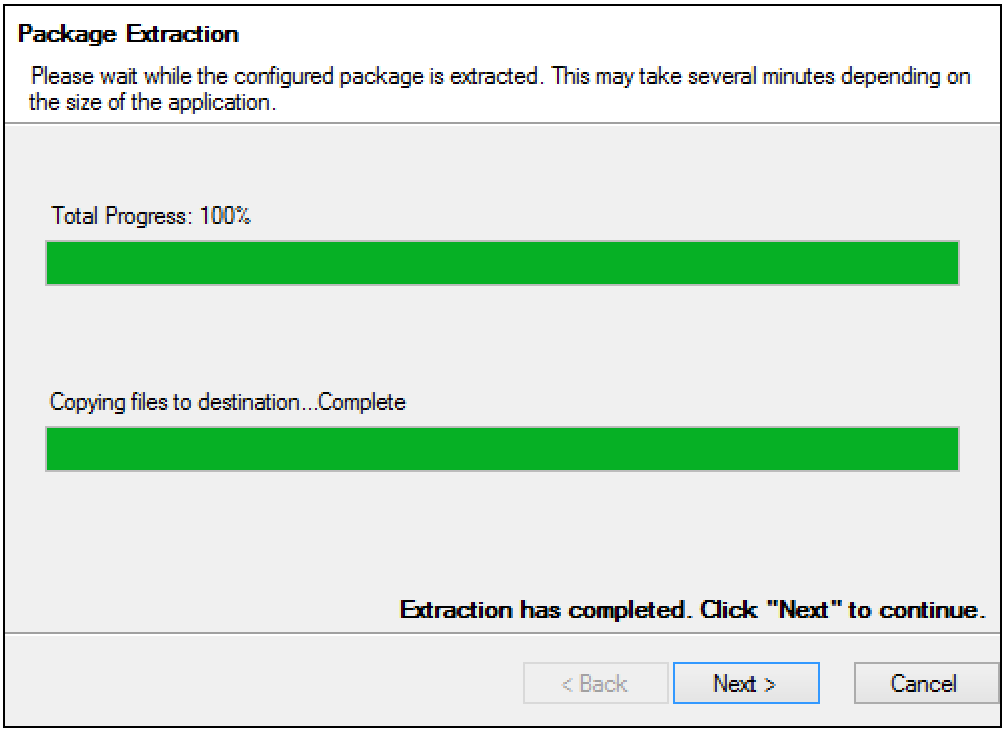
   If you click **Add**, the **Select Users and Groups** dialog is displayed:



   Select the **Domain or Workspace** to find users and groups under from the drop-down list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts.

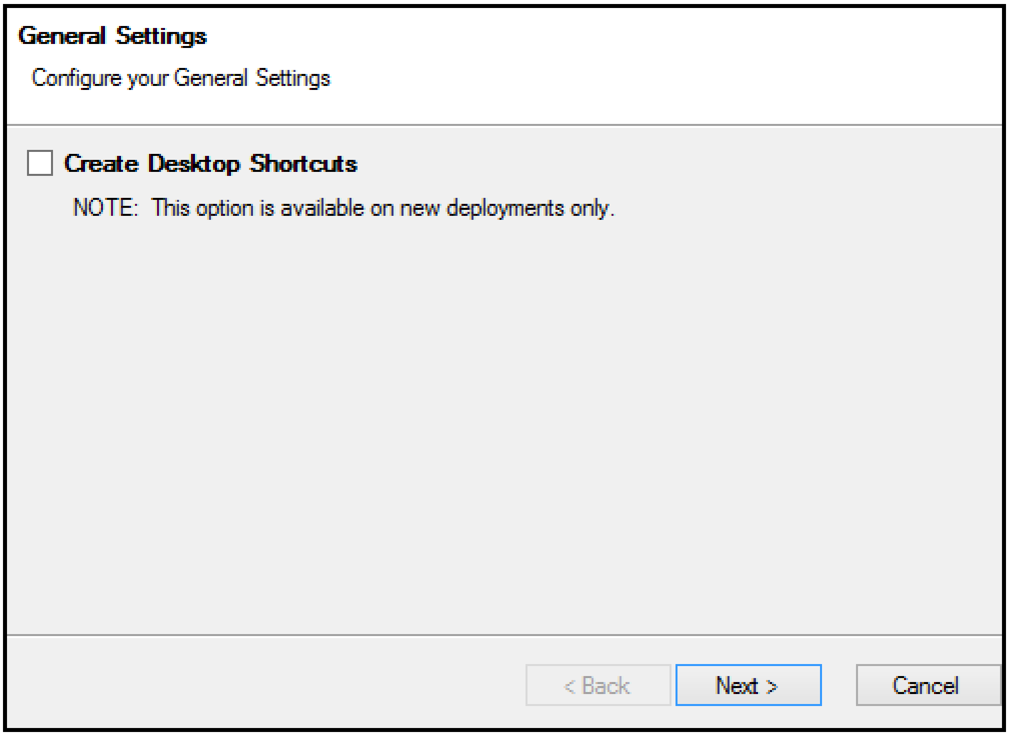
   Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

7. Click **Next**.

Note: You do not need to complete the steps under **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

Manually Created Share Steps

If you selected **Skip this step** at the **How do you want to deploy...?** dialog, you must manually create the share that the deployment will be installed to.

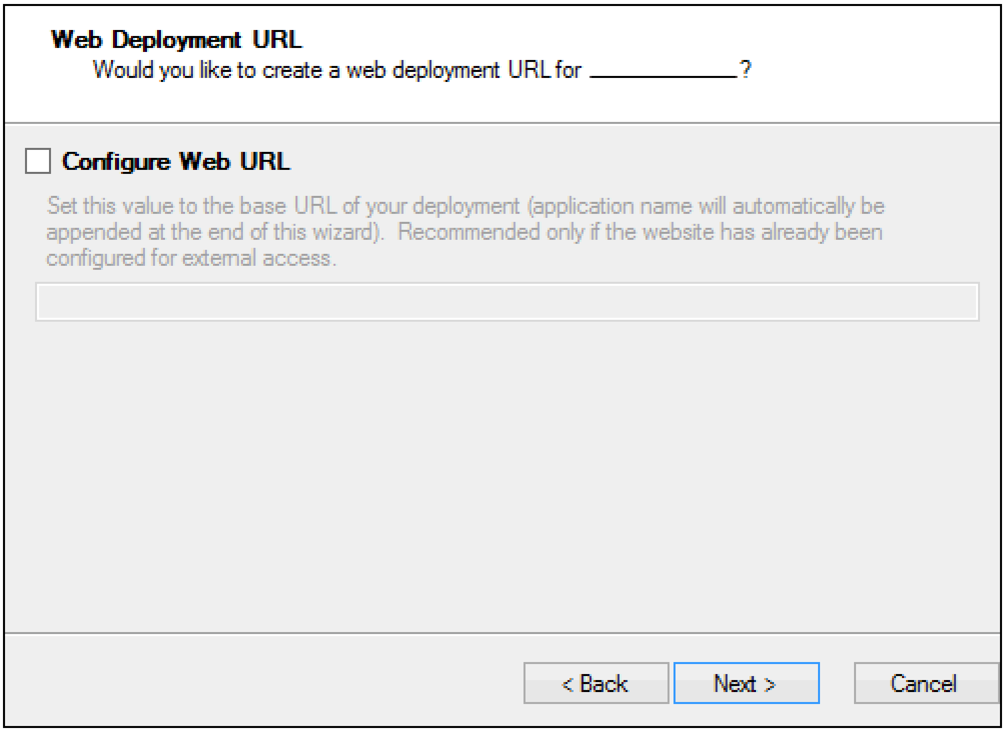
If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

Tip: For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

If you are installing the deployment package to a network share, **Read** access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation.

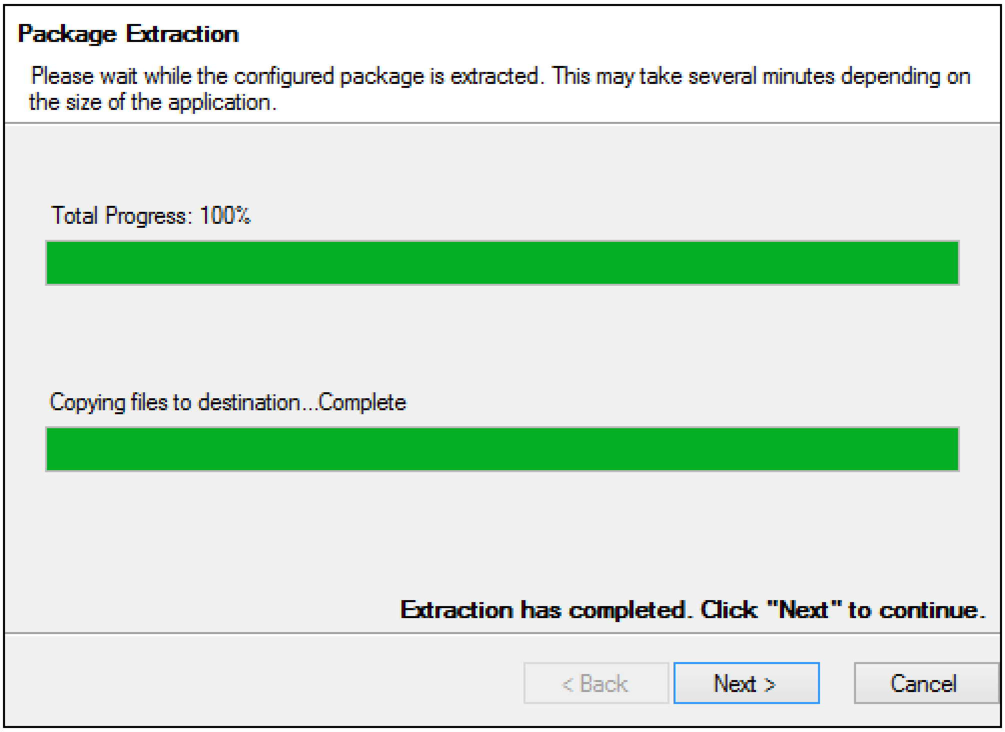
If you selected **Skip this step** at the **How do you want to deploy...?** dialog, the **Web Deployment URL** dialog is displayed:



1. Select **Configure Web URL** to have the installer create the link to the deployment that will be sent out to client machines for client installations of the deployed application. This link is available to be copied at the end of the installation, if one is configured.

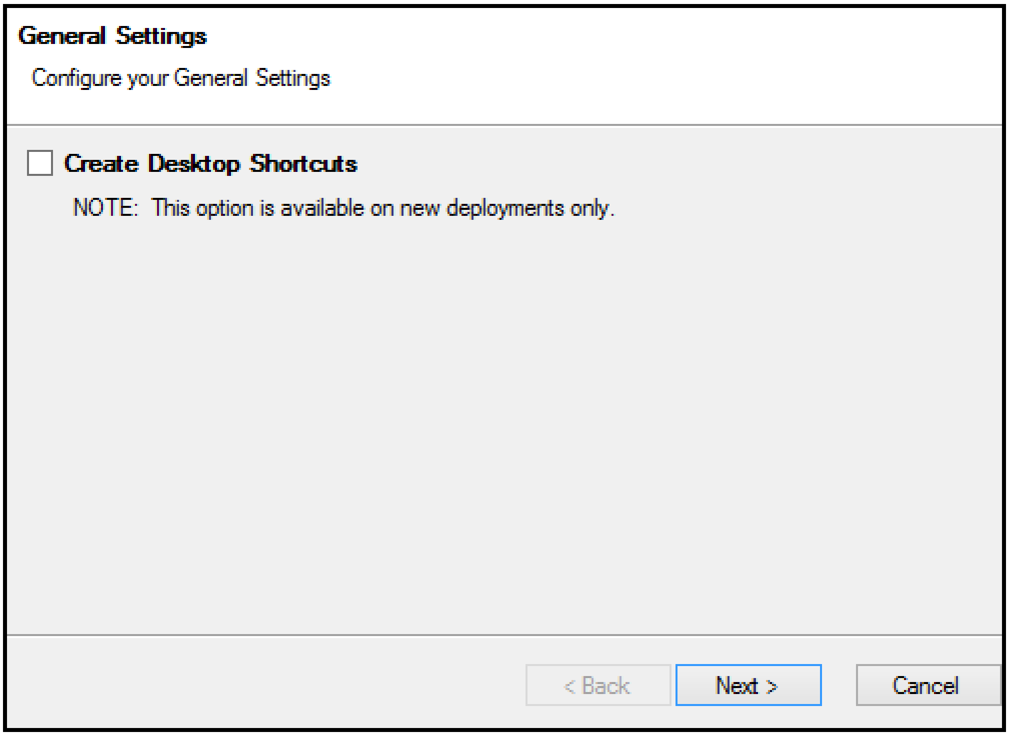
Tip: Do not select this option if the deployment Web site has not been configured for external access.

2. In the field, enter the base URL of your deployment without the application name (for example, **https://web-server/virtual-directory**). The application name is automatically appended to the URL at the end of the installation.
3. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



4. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

Note: The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.



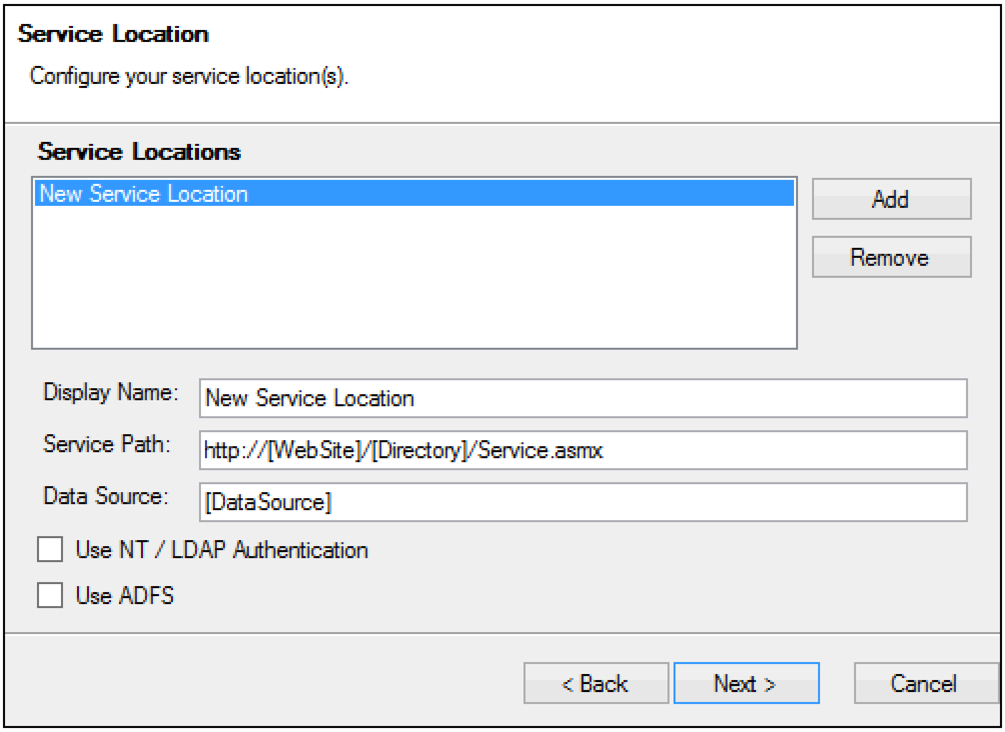
Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

Note: This option is only available for new deployments.

5. Click **Next**.

Service Location and Deployment Configuration

After clicking **Next**, the **Service Location** dialog is displayed.



1. Click **Add**.
2. Enter in the **Display Name** field the name of the service location.
3. Enter in the **Service Path** field the full URL to the OnBase application or Web server service (for example, **https://machinename/AppServer/Service.asmx** or **https://machinename/AppNet/Service.asmx**).

Note: URLs that use the HTTPS binding must be correctly configured on the server for secure connections.

4. In the **Data Source** field, enter the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

Note: In order to use Active Directory or LDAP authentication, the database against which Release of Information runs must also be configured for Active Directory or LDAP authentication. The installer configures Release of Information to match the authentication scheme of the database.

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

Note: Use ADFS is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For more information about configuring OnBase to use AD FS, see the **Legacy Authentication Methods** module reference guide.

Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

Note: Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

Package-Specific Installation Steps

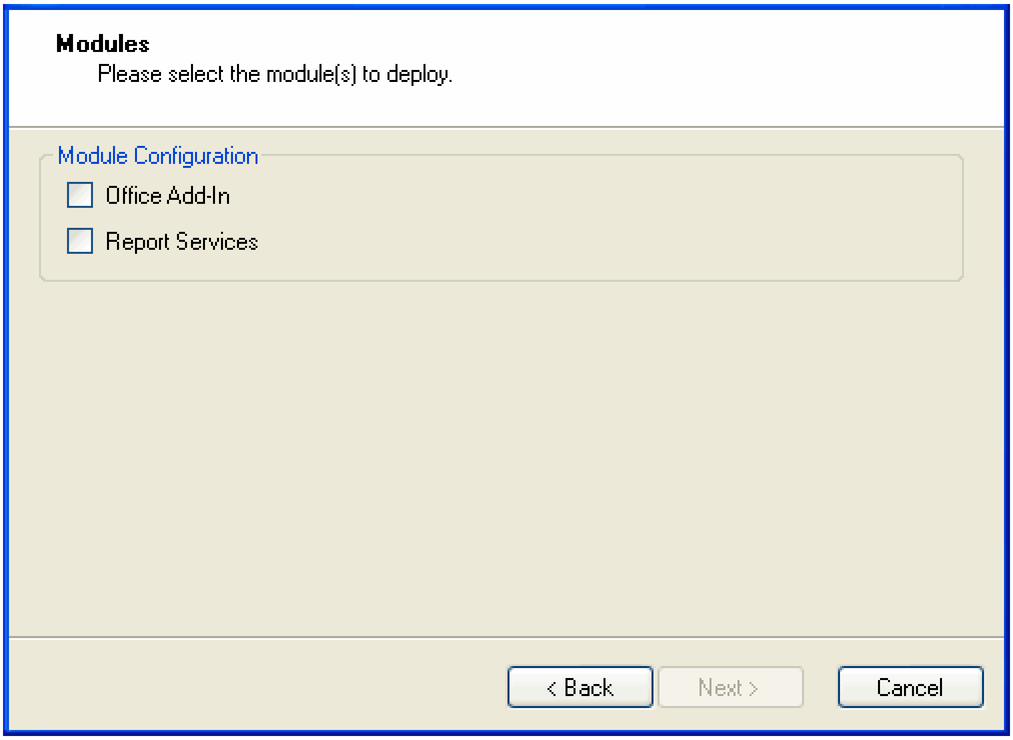
Some of the packages installed using the Hyland Office Products Installer require additional configuration.

Template Builder

Template Builder has no additional configuration steps to install the deployment package. Go to Deployment Signing.

Excel Add-In

After configuring the service location, the **Modules** dialog is displayed:



Note: The options available in this dialog are dependent on the licensing and rights of the user who logged in to OnBase.

Select the integrations to install, then click **Next** and complete the steps in the corresponding sections below.

Office Add-In

Select **Office Add-In** to install the Office Add-In for Excel deployment package. There are no additional configuration steps to install the deployment package. Go to Deployment Signing on page 51.

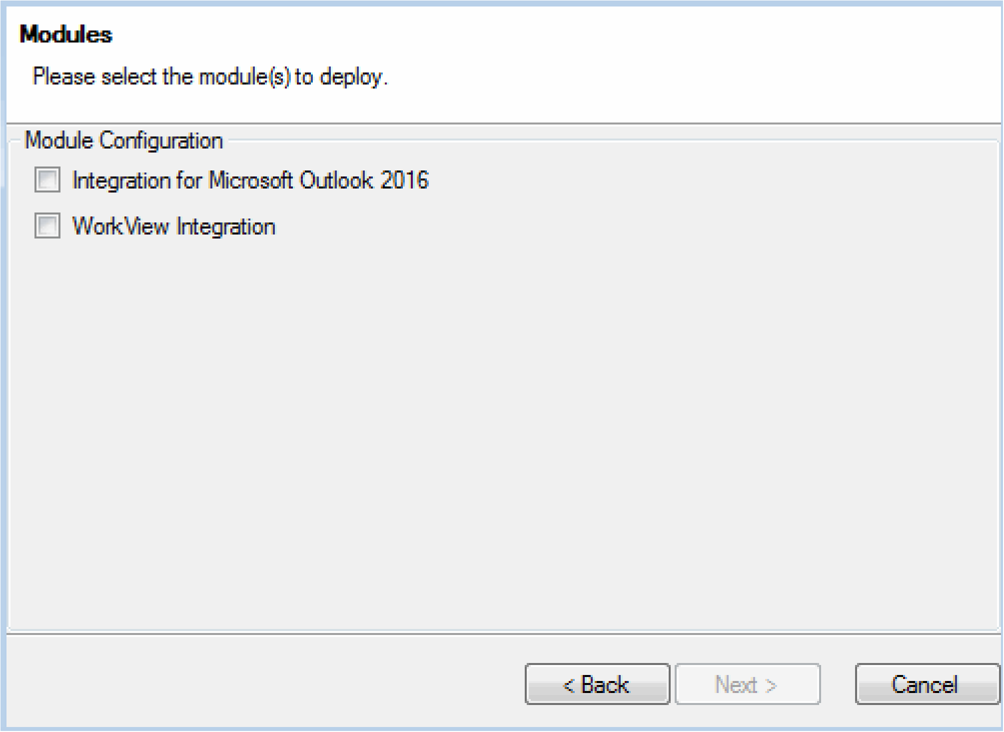
Note: To install the Office Add-Ins for PowerPoint and Word you must install those deployment packages separately by selecting them at the **Package Selection** dialog.

Report Services

The Report Services Excel Add-In has no additional configuration steps to install the deployment package. Go to Deployment Signing on page 51.

Outlook Integration

After configuring the service location, the **Modules** dialog is displayed:

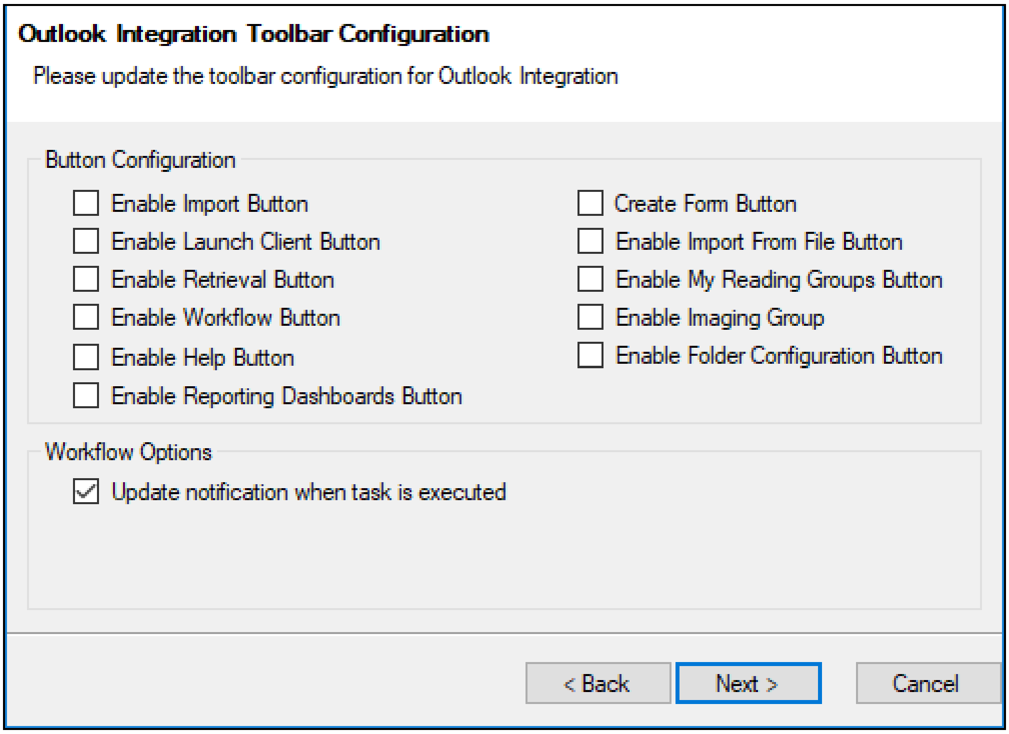


Note: The options available in this dialog are dependent on the licensing and rights of the user who logged in to OnBase.

Select the integrations to install, then click **Next** and complete the steps in the corresponding sections below.

Integration for Microsoft Outlook 20XX

1. The **Outlook Integration Toolbar Configuration** dialog is displayed.



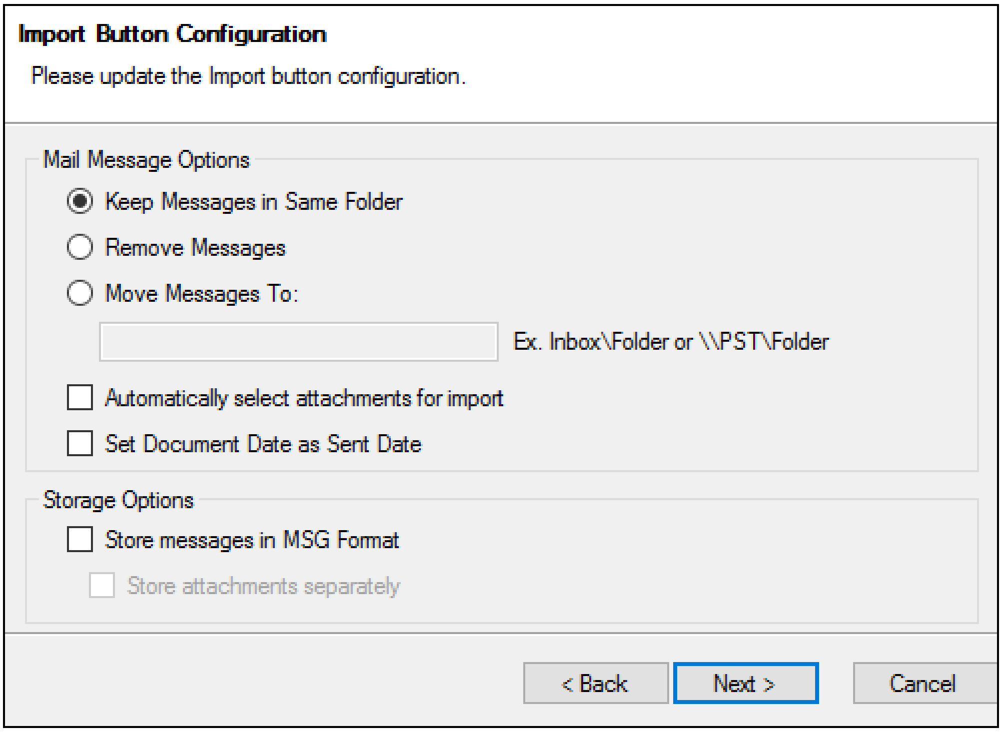
2. Select the options you would like to enable:

Note: Enabling options does not guarantee they are available in Outlook. Options may also require specific User Group privileges, additional licensing, or both.

Option	Description
Button Configuration	
Enable Import Button	If selected, the **Import** button is available on the Outlook Integration toolbar. This function allows users to import messages directly to OnBase from Outlook.
Enable Launch Client Button	If selected, the **Launch Client** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Client directly from Outlook.
Enable Retrieval Button	If selected, the **Retrieval** button is available on the Outlook Integration toolbar. This function allows users to retrieve documents archived in OnBase directly from Outlook.

Option	Description
Enable Workflow Button	If selected, the **Workflow** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Workflow Client directly from Outlook.
Enable Help Button	If selected, the **Help** button is available on the Outlook Integration toolbar. This provides users access to the relevant OnBase help files.
Enable Reporting Dashboards Button	If selected, the **Dashboards** button is available on the Outlook Integration toolbar. This function allows users to create a new dashboard directly from Outlook.
Enable Create Forms Button	If selected, the **Create Form** button is available on the Outlook Integration toolbar. This function allows users to create a new form.
Enable Import From File Button	If selected, the **Import from File** button is available on the Outlook Integration toolbar. This function allows users to open the **Import from File** window.
Enable Imaging Group	If selected, the Imaging options are available on the Outlook Integration toolbar. These options include the **Send to Scan Queue** and **Batch Processing** buttons. These functions allow you to route messages and attachments into a Scan Queue or batch scan process. **Note:** The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To). If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.
Enable My Reading Groups Button	If selected, the **My Reading Groups** button is available on the Outlook Integration toolbar. This function allows users to open the My Reading Groups interface.
Workflow Options	
Update notification when task is executed	Select to update Workflow email notifications after a task is executed, to include specific information on the ad hoc task that was executed.

3. Click **Next**. Depending on the options you selected, the **Import Button Configuration** dialog box may be displayed.



4. Configure the following options:

Option	Description
Mail Message Options	
Keep Messages in Same Folder	Email messages that are imported into OnBase are kept in the same Outlook mail folder after being imported. This option is selected by default when the **Enable Import Button** option is selected. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Remove Messages	Email messages that are imported into OnBase are deleted from the email server after being imported. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Move Messages To	Email messages are moved to a different Outlook folder after being imported into OnBase. Enter in the field provided the folder for imported email messages to be moved to. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Automatically select all attachments for import	Automatically selects all email attachments when importing email messages into OnBase. **Note:** Users can still modify which email attachments are actually included when importing email messages into OnBase.
Set Document Date as Sent Date	Use the date that an email was sent as the Document Date for the message when it is imported into OnBase. If this option is not selected, the date the email message was imported into OnBase is used as the Document Date. **Note:** If this option is selected and an email does not have a **Received Time** value, the current date is used.
Storage Options	

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Store messages in MSG Format</td><td>Selected: Select this option to archive messages in OnBase in their native Outlook format (*.msg). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. However, this allows you to access all of the same Outlook functionality that is available when you open a message in Outlook (e.g., forwarding a message, replying to a message, etc.).

Note: When this option is selected, users are unable to view the message that is being imported by clicking the envelope icon in the Import Mail Document dialog box. This may prevent messages from being indexed incorrectly.

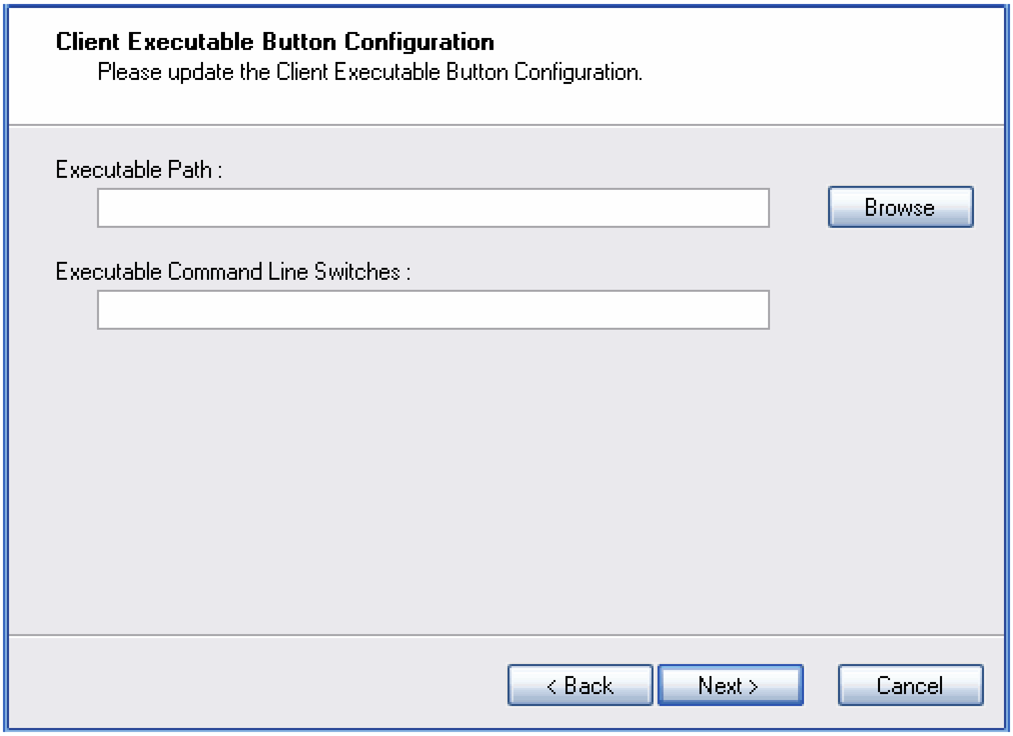
Not selected: If this option is not selected, messages are archived in the format in which the message was created (e.g., plain or rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.</td></tr>
<tr><td>Store attachments separately

Note: This option is only available if Store messages in MSG Format is selected.</td><td>Selected: If Store messages in MSG Format is selected, select this option to store attachments as separate documents from the messages they are attached to. Attachments are stored and retrieved in their respective file formats and the Attachment(s) button is available in the Import Mail Document dialog box, if the message has attachments.

Not selected: If Store messages in MSG Format is selected and this option is not selected, all attachments are stored in the same *.msg file as the message they are attached to and the Attachment(s) button is not available in the Import Mail Document dialog box.</td></tr>
</table>

Tip: For a complete discussion of the Outlook Integration import functionality, see one of the Integration for Microsoft Outlook module reference guides.

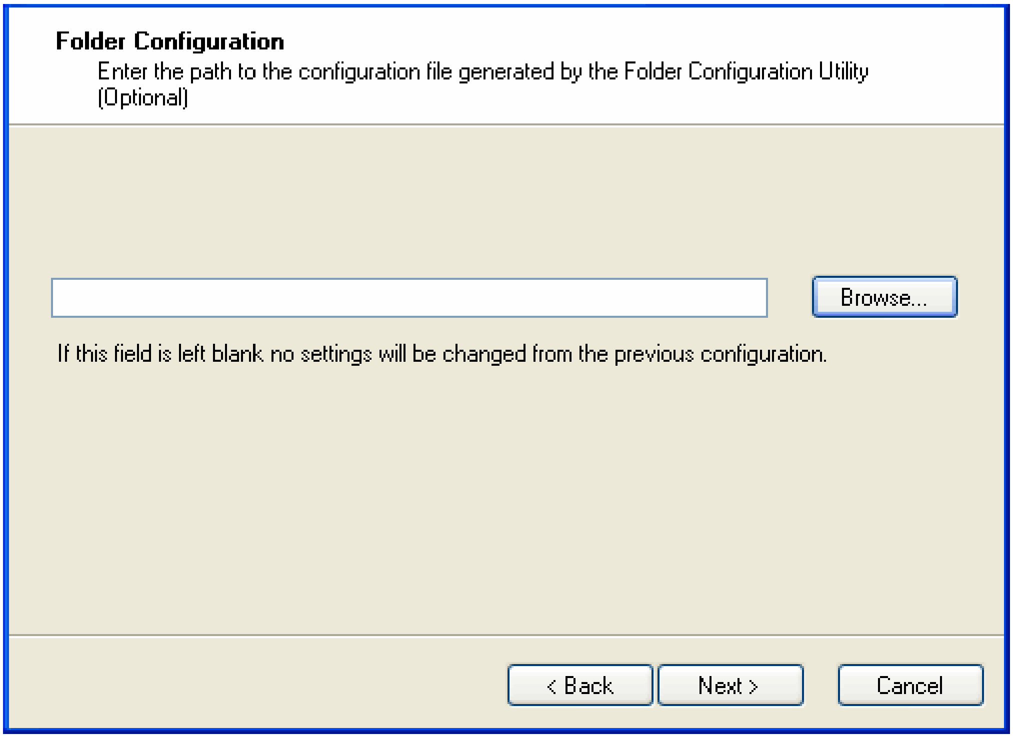
5. Click **Next**. Depending on the options you selected, the **Client Executable Button Configuration** dialog may be displayed.



6. Enter the path to the OnBase Client executable in the **Executable Path** field, or click the **Browse** button next to the field to browse to the location of your OnBase Client executable.
7. Enter in the **Executable Command Line Switches** field any OnBase command line switches to append to the OnBase Client when it is launched from Outlook.

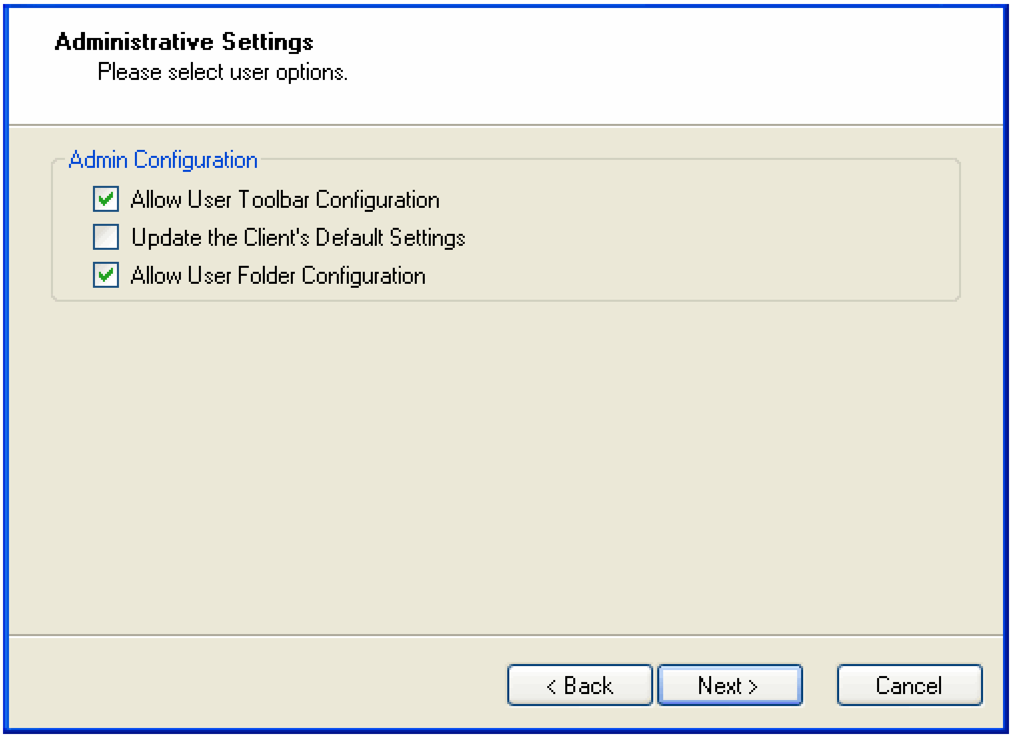
Tip: For more information on command line switches, see the **Command Line Switches** section in the **System Administration** module reference guide.

8. Click **Next**. Depending on the options you selected, the **Folder Configuration** dialog may be displayed.



If you created a folder configuration file using the **Folder Configuration Utility**, enter the full path to it in the field provided, or click **Browse** to navigate to the file and select it. If you did not create a folder configuration file, leave the field empty.

9. Click **Next**. The **Administrative Settings** dialog is displayed.



10. Configure the following options:

Option	Description
Allow User Toolbar Configuration	If selected, users can change the default configuration of their Outlook Integration toolbar.
Update the Client's Default Settings	If selected, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. For example, this option must be selected to overwrite previously configured command-line switches. **Note:** This option is not available if **Allow User Toolbar Configuration** is not selected.
Allow User Folder Configuration	If selected, users can change the configuration of their Outlook folders.

11. Go to Deployment Signing on page 51.

WorkView Integration for Outlook

The WorkView Integration has no additional configuration steps to install the deployment package. Go to Deployment Signing on page 51.

PowerPoint Add-In

There are no additional configuration steps to install the PowerPoint Add-In deployment packages. Go to Deployment Signing on page 51.

Word Add-In

There are no additional configuration steps to install the Word Add-In deployment packages. Go to Deployment Signing on page 51.

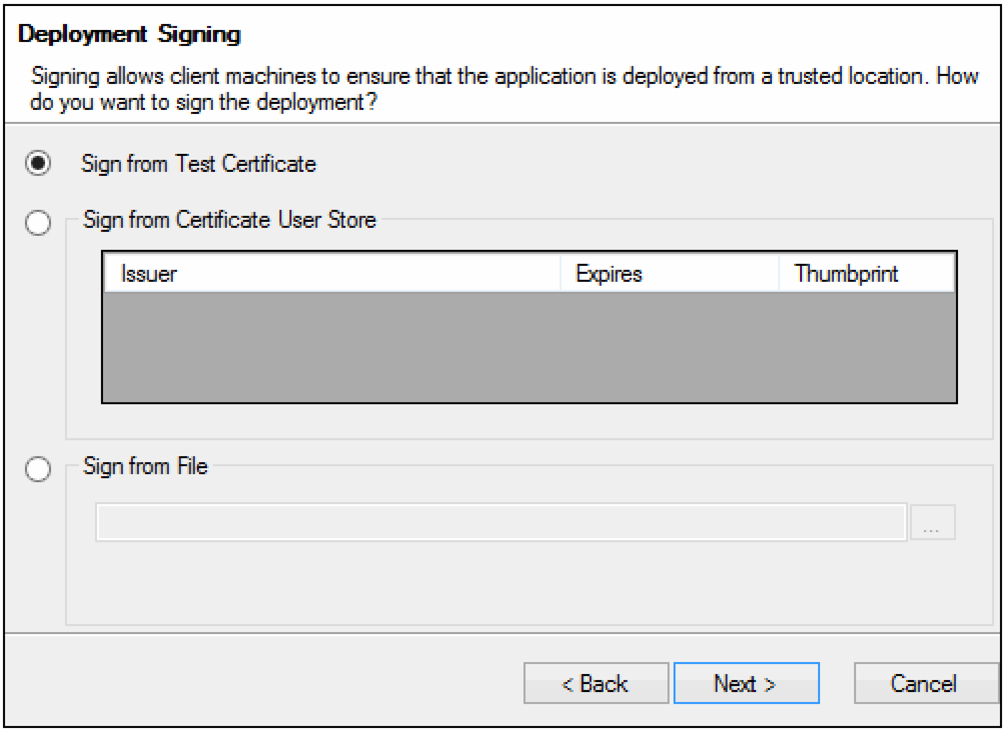
Deployment Signing

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box.

If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

If you are not in advanced mode, you must access the files directly by navigating to the deployment location before signing the deployment.

The **Deployment Signing** dialog box is displayed.



1. Select the appropriate signing method.

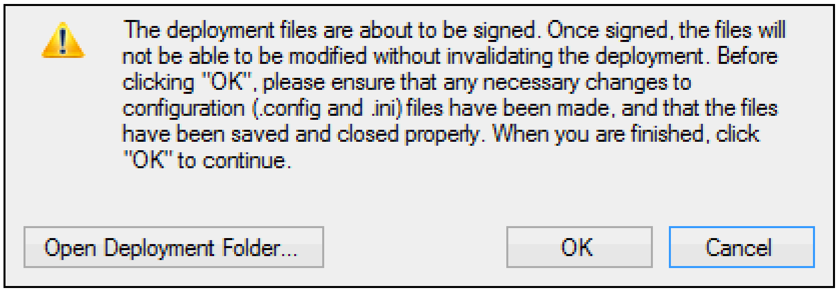
   When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

   When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

   When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

Caution: Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the *.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

2. Click **Next**. If you are in **Advanced Mode**, the **File Edit Notification** dialog box is displayed.



   From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder must be made, such as custom changes to the *.config file for the module.
3. Click **OK**. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance.
4. If you signed the deployment from a file, and the certificate requires a password, you will be prompted to enter the password for the certificate.

Tip: You can paste the password into the field to ensure accuracy.

5. The application is deployed and the **Summary** dialog is displayed upon completion.

   Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

   Click **Copy Link To Clipboard** to copy this link to the clipboard.
6. Click **Finish**.

Upon completing these steps, you have installed the Deployment Wizard and installed an instance. You can add additional instances and access the Deployment Wizard by selecting **Start | All Programs | Hyland | Deployment | Deployment Wizard**. You can also update existing instances in the same way. See the Updating or Adding a Deployment Instance section for more information.

Additional Installation

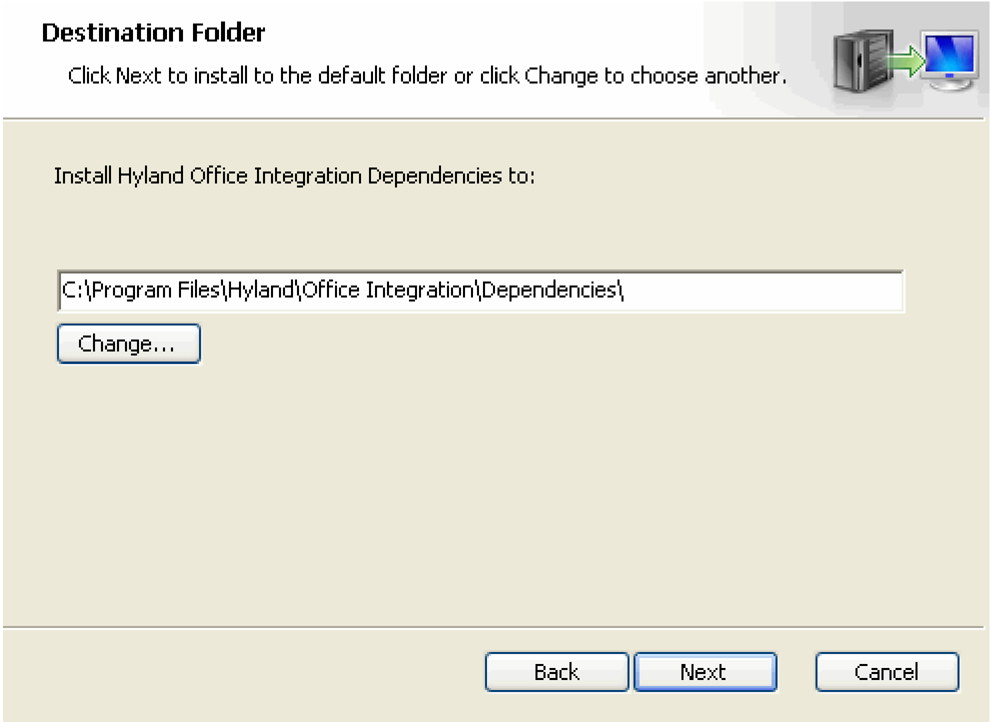
After running the **Hyland Office Products Deployment** installer you must run the separate **Hyland Office Integration Dependencies** installer on each workstation before the Office integration packages are deployed to those workstations. This installer installs the prerequisites required to use the Office and Outlook integration modules on the client workstations. These prerequisites are not included in the deployment packages and cannot be deployed using ClickOnce.

The **Hyland Office Integration Dependencies** installer installs the following prerequisites on the workstation:

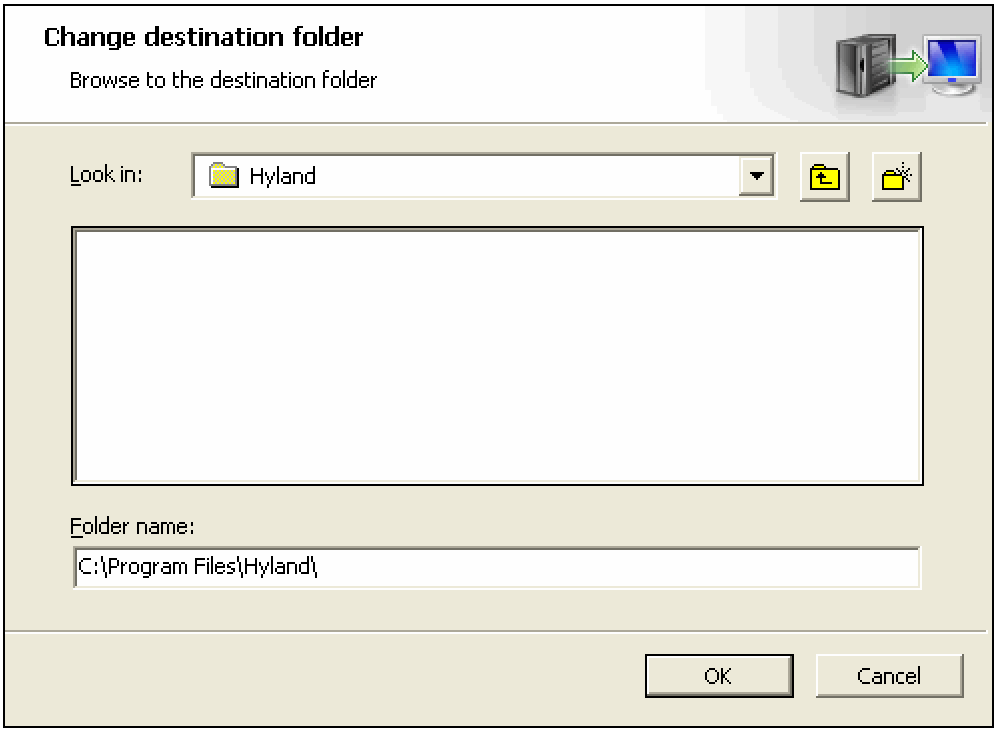
- dsoframer.ocx
- wiaaut.dll
- Microsoft Visual Studio 2010 Tools for Office Runtime (x86) SP1 package

To run the **Hyland Office Integration Dependencies** installer, execute **setup.exe** by double-clicking on the file name in or using **Start | Run**. This executable is usually located in the **\install\ClickOnce\Office Products\Dependencies** folder of your source installation files.

1. Click **Next** at the **Welcome** dialog. The **Destination Folder** dialog is displayed.



2. To change the installation location of the installed components, click **Change**. The **Change destination folder** dialog is displayed.



Enter a **Folder name** in the field provided or select it from the **Look in** drop-down list.

If the destination folder is not changed, components are installed to the following default location: **C:\Program Files\Hyland\Office Integration\Dependencies**.

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

3. Click **Next**. The **Ready to install** dialog is displayed.
4. Click **Install**.
5. Click **Finish** after the installation has completed.

Note: The **Hyland Office Integration Dependencies** installer only installs missing prerequisites. If a prerequisite is already installed on the workstation it is not installed again by the **Hyland Office Integration Dependencies** installer.

Remove Installed Prerequisites

After initial installation, the setup program can be used to remove components from a previous installation. After launching **setup.exe** the **Change, repair, or remove installation** dialog is displayed. The only option able for the **Hyland Office Integration Dependencies** installer is **Remove**.

Click **Remove** to remove prerequisites installed by the **Hyland Office Integration Dependencies** installer.

Note: The **Hyland Office Integration Dependencies** installer will only removed installed prerequisites if they are not being used any other applications.

Controlling the Installer from the Command Line

This section describes the feature and property names that can be applied to the command line to install and configure components contained in the **Hyland Office Integration Dependencies** installer.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

The feature and property names for the components in the **Hyland Office Integration Dependencies** installer are:

- Feature name: **Hyland_Office_Dependencies**
- Property name: **OFFICEDEPENDENCIES_FILES**

Note: Feature and property names are case sensitive and must be added to the command line exactly as they appear in this manual.

The **OFFICEDEPENDENCIES_FILES** property is optional and is used to define the location that the installed components are installed to. If this property is not included the components are installed to: **C:\Program Files\Hyland\Office Integration\Dependencies**.

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

To install the components from the command line use the **ADDLOCAL** property. The **ADDLOCAL** property is appended to the end of the install command line, as shown here in the following example. This example also installs the prerequisites to the **C:\MyCustomFolder** directory:

msiexec /i "Office Integration Dependencies.msi" ADDLOCAL=Hyland_Office_Dependencies OFFICEDEPENDENCIES_FILES="C:\MyCustomFolder\"

Updating or Adding a Deployment Instance

When a change is necessary for a deployment instance, it can be updated or a new instance can be created.

To update an existing instance or create a new instance, do not launch the Hyland Office Products Deployment installer. Instead, select **Start | All Programs | Hyland | Deployment | Deployment Wizard** on the deployment server. This launches the Deployment Wizard and the **Welcome to the Deployment Wizard Creation Wizard** dialog is displayed.

After launching the Deployment Wizard, see General Installation Options on page 23 and go to the **Welcome to the Deployment Wizard Creation Wizard** dialog step, then continue with the procedure to complete updating or adding an instance. The steps to update or add an instance are the same as they were when the Hyland Office Products Deployment installer was originally run, with the exception of how to launch the Deployment Wizard.

Removing a Deployed Application

Deployed applications are installed to both client workstations and the deployment server. This section describes how to remove a deployed application instance from both the client workstations and deployment server, or completely removing the deployed application and all installed instances.

Removing a Deployed Application Instance from Client Workstations

To remove a deployed application instance from a client workstation:

1. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
2. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
3. Locate the installed application in the list of programs (e.g., **Hyland Release of Information [Instance Name]**).
4. Select the program and click **Change/Remove**. The deployed application **Maintenance** dialog is displayed.
5. Select **Remove the application from this computer**.
6. Click **OK**.

The installed application is removed from the workstation.

Note: Removing the application instance from client workstations does not remove the application instance from the deployment server. Users can re-install a removed application instance by following the original link to the instance. To completely remove a deployed application instance, see Removing a Deployed Application Instance from the Deployment Server or Completely Removing a Deployed Application below.

Removing a Deployed Application Instance from the Deployment Server

If a deployed application instance is removed from all client workstations, it can be re-installed by users who follow the link to the deployed application instance, unless the instance is also removed from the deployment server.

To remove an instance of a deployed application in order to reset the version and/or re-use an instance name:

1. Access the Windows Registry (enter **regedit** in the Windows **Start | Run** dialog). The **Registry Editor** dialog is displayed.

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

2. Expand the following registry key: **HKEY_LOCAL_MACHINE\SOFTWARE\Hyland\Deployment**

   Under 64-bit systems this key may be located at: **HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Hyland\Deployment**
3. Expand the subkey that corresponds to the deployed application you want to remove the instance from (for example, **ApplicationEnabler** or **ReportServices**).
4. Right click the subkey that corresponds to the instance name you want to remove.
5. Select **Delete**.
6. Click **Yes** at the confirmation prompt. The deleted instance is no longer available in the Deployment Wizard.
7. Locate the files for the instance to remove on the deployment server.

   The location of the files depends on the location selected during installation. In a default, 32-bit installation, the files are located at **C:\Program Files\Hyland\[ApplicationName]\[InstanceName]** (for example, **C:\Program Files\Hyland\ApplicationEnabler\MyAppEnablerInstance**).
8. Delete all of the files and folders contained in the instance folder, or delete the entire instance folder. The application is no longer available for installation.

Caution: Take care to delete only the folder for the instance you are removing. Deleting the application folder will remove all instances of the deployed application.

Note: If the instance files are not removed from the deployment server, the application instance can still be installed by users who follow the link to the deployed application.

9. Follow the steps above to remove the installed instance from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until the instance is removed from client workstations, the application instance can still be used by client workstations, even if it is removed from the deployment server.

Completely Removing a Deployed Application

To completely remove a deployed application:

1. Follow the steps above to remove all instances of the deployed application from the deployment server (see, Removing a Deployed Application Instance from the Deployment Server).
2. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
3. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
4. Locate the installed application in the list of programs (e.g., **Hyland Release of Information** or **Hyland Release of Information Deployment**).
5. Select the application and click **Change/Remove**. The application and deployment package is removed.

Note: Removing the last deployed application from the deployment server also removes the **Deployment Wizard** from the deployment server.

6. Follow the steps above to remove all instances of the deployed application from all client workstations (see, Removing a Deployed Application Instance from Client Workstations).

Note: Until all instances of the application are removed from client workstations, the application can still be used by client workstations, even if it is removed from the deployment server.

Installation Using the Standard (MSI) Installer

The **Hyland Office 20XX Integration** installers are used to install the selected modules to the workstation on which it is run (see Overview on page 16).

The Hyland Office Integration installers can be run from an installation CD or a local drive.

Note: You must be appropriately licensed for all modules and functionality installed. You can install, but cannot use, modules for which you are not licensed.

Overview

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\\"my value\\" INSTALL_PROPERTY_2=\\"my value 2\\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Tip: For complete details on running the installer from the command line, see Controlling the Installer from the Command Line on page 77.

Hyland Office Integration Installer

The Hyland Office integration installer can install the Microsoft Office integration module corresponding to your Microsoft Office configuration. Each supported version of Microsoft Office has its own integration installer.

See the following sections for information on the integration installer and instructions on running the integration installer:

- Hyland Office 2019 Integration Installer Modules on page 62
- Installing the Hyland Office 2019 Integration on page 62

Hyland Office 2019 Integration Installer Modules

The **Hyland Office 2019 Integration** installers are used to install the 32- or 64-bit version of the following modules:

Component	Module
Word 2019 Add-In	Installs the **Office Add-In for Microsoft Word 2019**.
PowerPoint 2019 Add-In	Installs the **Office Add-In for Microsoft PowerPoint 2019**.
Excel 2019 Add-In | Office Add-In	Installs the **Office Add-In for Microsoft Excel 2019**.
Excel Report Services Add-In	Installs the **Report Services Excel Add-In for Microsoft Excel 2019**.
Outlook 2019 Integration | Outlook Integration	Installs the **Integration for Microsoft Outlook 2019**.
WorkView Integration for Outlook	Installs the **WorkView Integration for Microsoft Outlook 2019**.
Template Builder 2019	Installs **Template Builder 2019**, which is the Document Composition configuration component.

Installing the Hyland Office 2019 Integration

To run the Hyland Office 2019 Integration installer:

1. Execute **setup.exe** with administrator privileges. This can be done by right-clicking on the file name and selecting **Run as administrator**. The welcome page is displayed.

   This executable is usually located in the folder of your source installation files that corresponds to the version of the integration you are installing.

Note: If the installer is copied from the source location to be run from a different location, the entire folder and its contents must be copied to the new location.

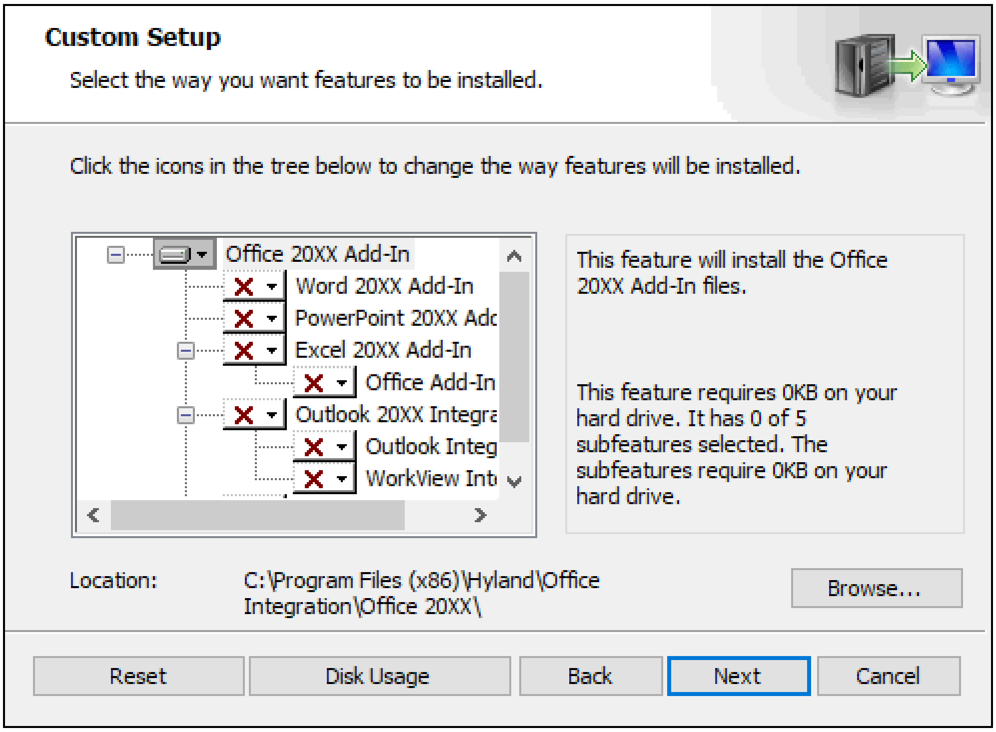
The following are the default folder locations for the 32-bit and 64-bit executable files, where **XX** is the year of the integration:

- Integration for Microsoft Office 20XX (32-bit): **\Office Integration\Office 20XX**
- Integration for Microsoft Office 20XX (64-bit): **\x64\Office Integration\Office 20XX**

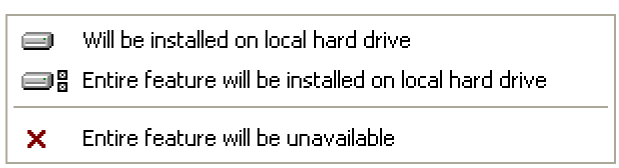
Note: You must use the installer that matches your version of Microsoft Office. For example, if you have a 64-bit version of Microsoft Office, then the 64-bit Hyland Office Products Installer must be used.

2. Click **Next**. The **Custom Setup** page is displayed.

Note: The screen shots used in the following sections are for illustrative purposes. The versions of the add-ins and the components available to install will match the version of the installer you launched.



3. Click the drop-down list beside the name of a component to display the installation options:



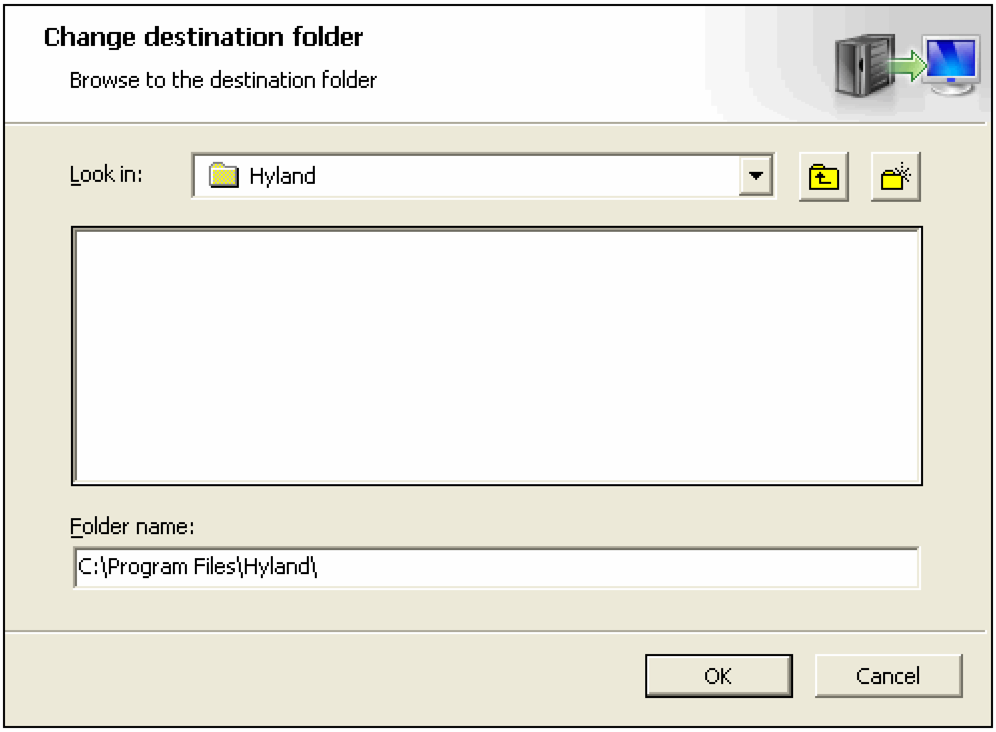
Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub-feature list.
Entire feature will be installed on local hard drive	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the **+** icon next to the feature to expand the sub-feature list.

Option	Description
Entire feature will be unavailable	Select this option to remove a feature from the list of features to install.

4. Select **Will be installed on local hard drive** for each component you want to install.

   To install all components, select **Entire feature will be installed on local hard drive** from the drop-down list beside **Office 20XX Add-In**.
5. To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog box is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation workstation.

6. To change the installation location of the installed components, select **Office 20XX Add-In** and click **Browse**. The **Change destination folder** page is displayed.



Enter the name of the destination folder in the **Folder name** field or select it from the **Look in** drop-down list.

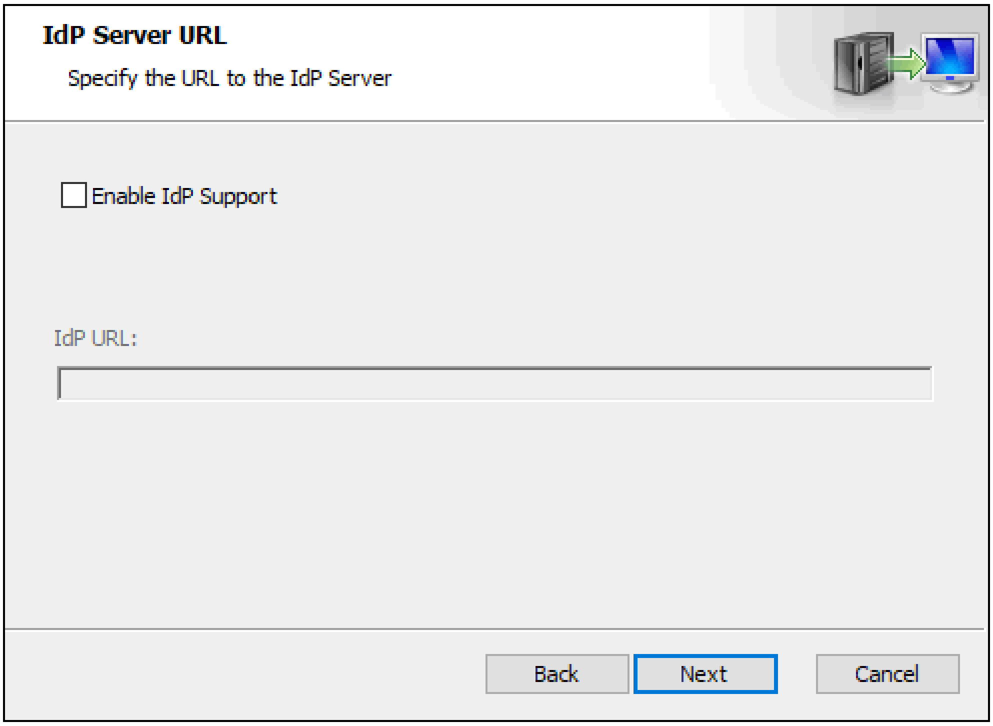
If the destination folder is not changed, components are installed to the following default locations:

- Office 20XX (32-bit): **C:\Program Files\Hyland\Office Integration\Office 20XX**
- Office 20XX (64-bit): **C:\Program Files (x86)\Hyland\Office Integration\Office 20XX**

Note: In these example default locations, **XX** designates the year of the integration you have installed.

7. Click **OK**.

8. From the **Custom Setup** page, click **Next**. The **IdP Server URL** page is displayed.

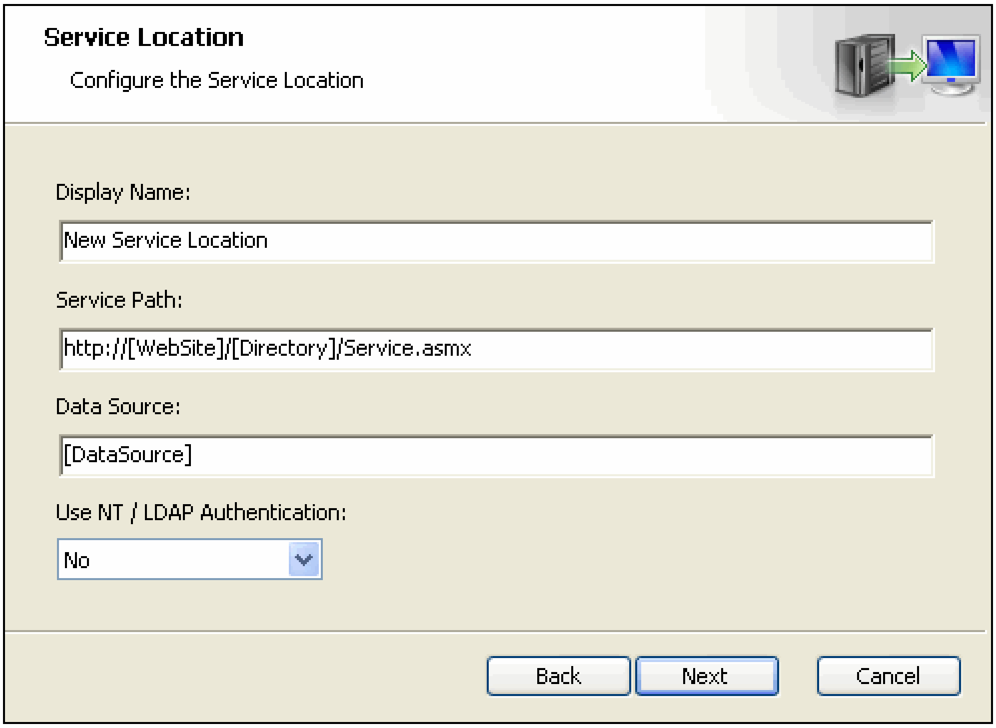


9. Select **Enable IdP Support** if your system uses the Hyland Identity Provider (IdP) server for authentication, then enter the URL to the endpoint of the Hyland IdP server with the tenant in the **IdP URL** field. This value is case sensitive.

   For example, if the Hyland IdP server is at **my.domain/identityprovider**, the tenant name is **MyTenant**, and the environment is configured for secure connections, then the value is **https://my.domain/identityprovider/MyTenant**.

Note: Enabling IdP support in the installer does not work if your environment is not already configured for IdP. Additional configuration is required to enable IdP support for the Hyland Office Products Installers. For more information, see the **Identity and Access Management Services** module reference guide.

10. Click **Next**. The **Service Location** page is displayed.



11. In the **Display Name** field, enter the name of the service location. This should be a user friendly name for the service location.
12. In the **Service Path** field, enter the full URL to the OnBase Application Server service page or Web Server address.

    An Application Server URL should use the following format: **http://machinename/AppServer/Service.asmx**

    A Web Server URL should use the following format: **http://machinename/AppNet/Service.asmx**

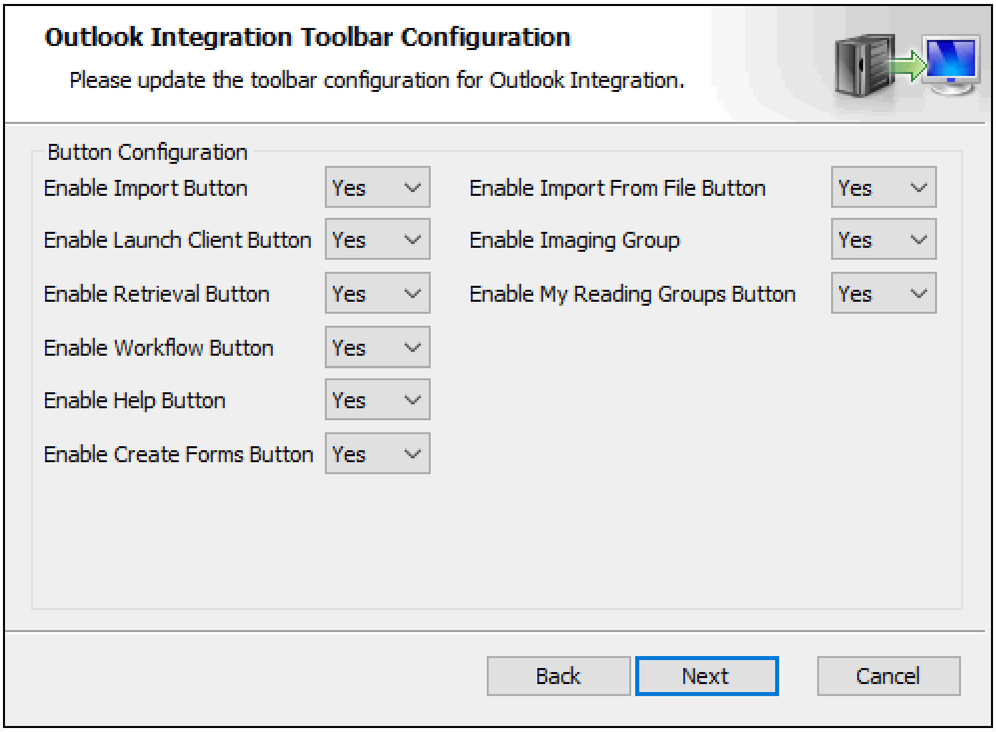
Note: Only Application Server and Web Server URLs ending in **.asmx** and using SOAP can be used with the Office integrations. For example, a remote service path ending in **.rem** is not valid.

13. In the **Data Source** field, enter the data source name for the appropriate data source.
14. From the Use **NT / LDAP Authentication** drop-down list, select one of the following options:
    - Select **Yes** if your system uses NT or LDAP Authentication to use NT/LDAP with the components installed

Note: To use NT or LDAP authentication, the **Data Source** entered must also be configured for NT or LDAP authentication.

- Select **No** if your system does not use NT or LDAP Authentication

15. Click **Next**. If you are installing the Outlook or WorkView integrations, the **Outlook Integration Toolbar Configuration** page is displayed.



16. Select **Yes** to enable an option of the integration or **No** to disable the option.

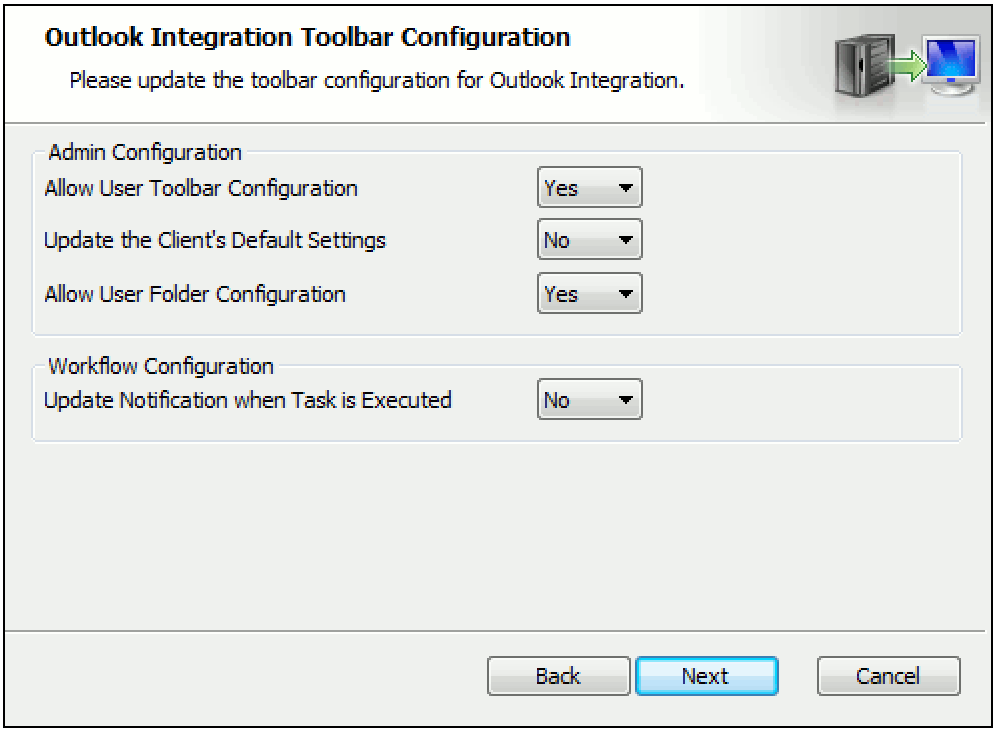
Note: Enabling options does not guarantee they are available in Outlook. Options may also require specific User Group privileges, additional licensing, or both.

The following are the available button configurations:

Option	Description
Enable Import Button	If selected, the **Import** button is available on the integration with OnBase ribbon. This function allows users to import messages directly to OnBase from Outlook.
Enable Launch Client Button	If selected, the **Launch Client** button is available on the integration with OnBase ribbon. This function allows users to launch the OnBase Client directly from Outlook.
Enable Retrieval Button	If selected, the **Retrieval** button is available on the integration with OnBase ribbon. This function allows users to retrieve documents archived in OnBase directly from Outlook.

Option	Description
Enable Workflow Button	If selected, the **Workflow** button is available on the integration with OnBase ribbon. This function allows users to launch a Workflow client directly from Outlook.
Enable Help Button	If selected, the **Help** button is available on the integration with OnBase ribbon. This function allows users access to the relevant OnBase help files.
Enable Create Forms Button	If selected, the **Forms** button is available on the integration with OnBase ribbon. This function allows users to create E-Forms or Unity Forms from Outlook.
Enable Import From File Button	If selected, the **Import from File** button is available on the integration with OnBase ribbon. This function allows users to import selected documents to OnBase.
Enable Imaging Group	If selected, the **Imaging** options are available on the integration with OnBase ribbon. These options include the **Send to Scan Queue** and **Batch Processing** buttons. These functions allow users to route messages and attachments into a scan queue or batch scan process. **Note:** The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To). If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.
Enable My Reading Groups Button	If selected, the **My Reading Groups** button is available on the integration with OnBase ribbon. This function allows users to open the **My Reading Groups** interface.

17. Click **Next** to continue configuring Outlook or WorkView integration options.

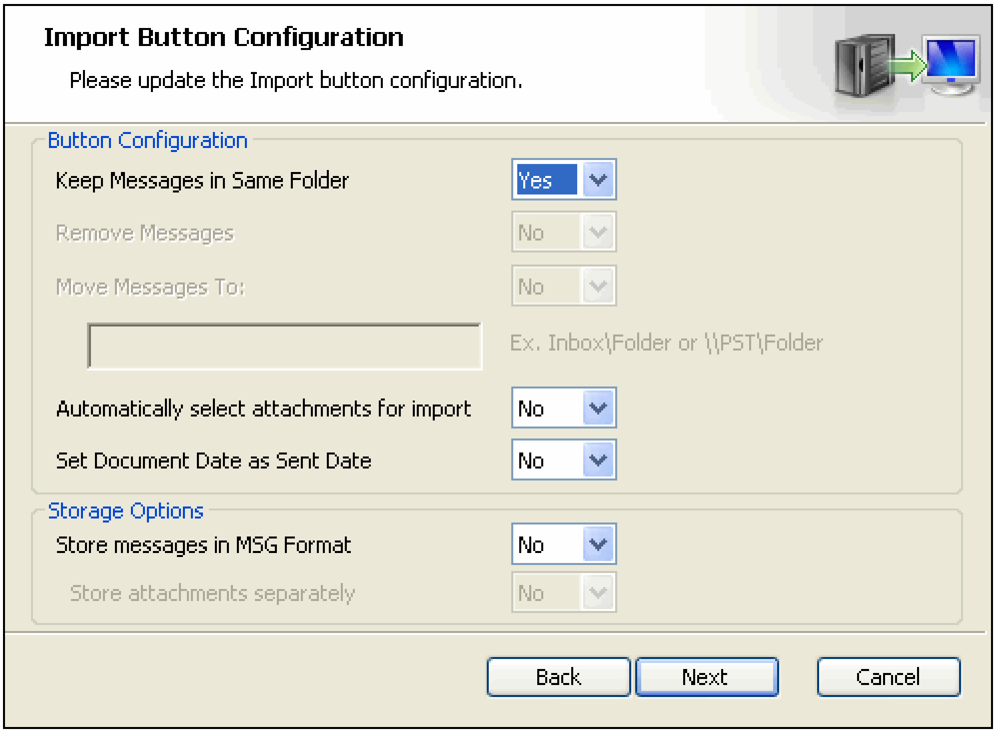


18. Select **Yes** to enable an option of the integration or **No** to disable the option. The following configuration options are available:

Admin Configuration Option	Description
Allow User Toolbar Configuration	If selected, users can change the default configuration of their integration with OnBase ribbon.
Update the Client's Default Settings	If selected, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. **Note:** This option is not available if **Allow User Toolbar Configuration** is not selected.
Allow User Folder Configuration	If selected, users can change the configuration of their Outlook folders.

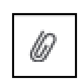
Workflow Configuration Option	Description
Update Notification when Task is Executed	Select to update Workflow email notifications after a task is executed. When selected, email notifications include specific information on the ad hoc task that was executed.

19. Click **Next**. Depending on the options you selected on the **Outlook Integration Toolbar Configuration** page, the **Import Button Configuration** page may be displayed.



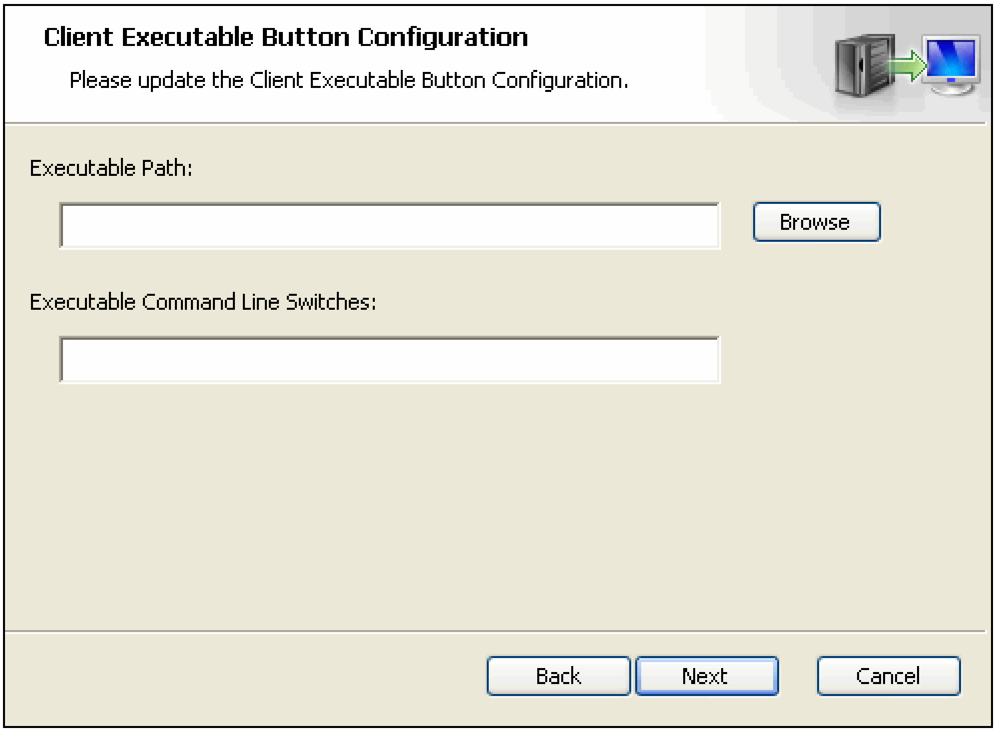
20. Select **Yes** to enable an option of the integration or **No** to disable the option. The following options are available:

Button Configuration Option	Description
Keep Messages in Same Folder	If **Yes** is selected, email messages that are imported into OnBase are kept in the same Outlook mail folder after being imported. This option is selected by default when the **Enable Import Button** option is selected. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Remove Messages	If **Yes** is selected, email messages that are imported into OnBase are deleted from the email server after being imported. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Move Messages To	If **Yes** is selected, email messages are moved to a different Outlook folder after being imported into OnBase. In the field provided, enter the folder to move the imported email messages to. **Note:** This option does not apply to email messages imported into OnBase using an Auto Import Folder.
Automatically select attachments for import	If **Yes** is selected, all email attachments are automatically selected when importing email messages into OnBase. **Note:** Users can still modify which email attachments are actually included when importing email messages into OnBase. See the sections on importing attachments in the **Integration for Microsoft Outlook** module reference guide.
Set Document Date as Sent Date	If **Yes** is selected, the date that an email was sent is used as the Document Date for the message when it is imported into OnBase. If this option is not selected, the date the email message was imported into OnBase is used as the Document Date. **Note:** If this option is selected and an email does not have a **Received Time** value, the current date is used.

Storage Option	Description
Store messages in MSG Format	If **Yes** is selected, messages are archived in OnBase in their native Outlook format (***.msg**). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. This allows you to access all of the same Outlook functionality that is available when you open a message in Outlook. For example, forwarding a message, replying to a message, etc. If **No** is selected, messages are archived in the format in which the message was created (for example, plain or rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.
Store attachments separately	**Note:** This option is only available if **Store messages in MSG Format** is selected. If **Yes** is selected, email attachments are stored as separate documents from the messages they are attached to. Attachments are stored and retrieved in their respective file formats and the Attachment button is available in the **Import Document** dialog box, if the message has attachments.  If **Yes** is selected for the **Store messages in MSG Format** option and **No** is selected for the **Store attachments separately** option, all attachments are stored in the same *.msg file as the message they are attached to and the Attachment button is not available in the **Import Document** dialog box.

Tip: For a complete description of the Outlook Integration import functionality, see the **Usage** chapter in one of the **Integration for Microsoft Outlook** module reference guides.

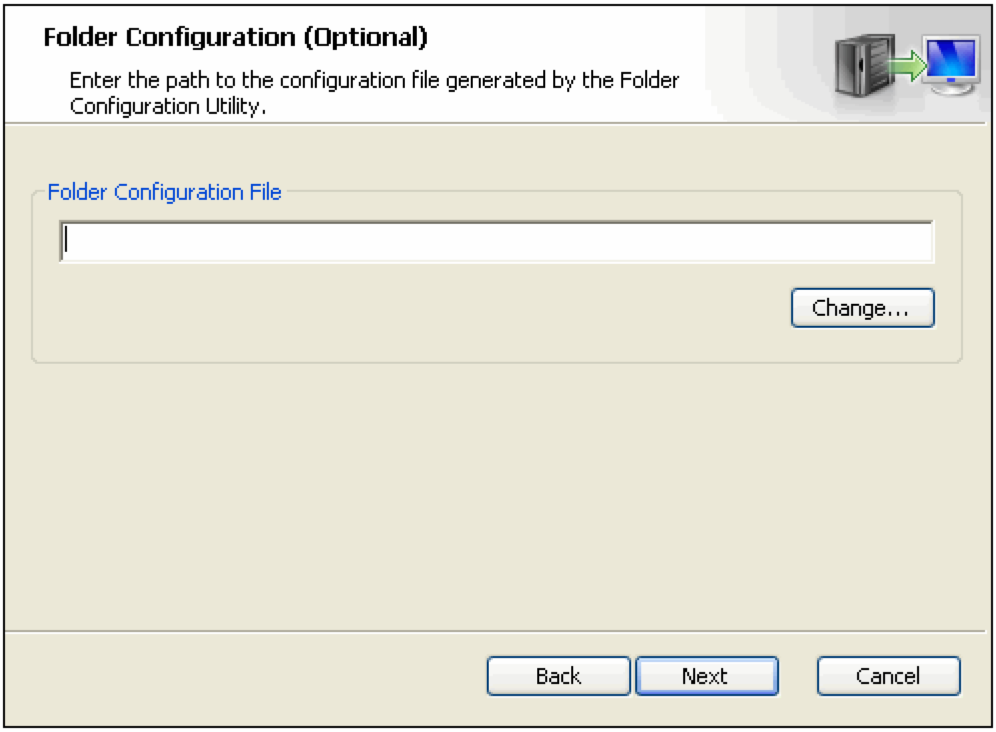
21. Click **Next**. Depending on the options you selected on the **Outlook Integration Toolbar Configuration** page, the **Client Executable Button Configuration** page may be displayed.



22. Enter the path to the OnBase Client executable in the **Executable Path** field, or click the **Browse** button next to the field to browse to the location of your OnBase Client executable.
23. Enter any OnBase command line switches to append to the OnBase Client when it is launched from Outlook in the **Executable Command Line Switches** field.

Tip: For more information on command line switches, see the **Command Line Switches** module reference guide.

24. Click **Next**. The **Folder Configuration (Optional)** page is displayed.



25. If you created a folder configuration file using the Folder Configuration Utility, enter the full path to it in the **Folder Configuration File** field, or click **Change** to navigate to the file and select it. If you did not create a folder configuration file, leave the **Folder Configuration File** field empty.

Note: See Outlook Folder Configuration Utility on page 61 for details on using the Folder Configuration Utility.

26. Click **Next**. The **Ready to install** page is displayed.
27. Click **Install**.

Changing the Language and Culture Settings

If you want to change the language and culture settings of the modules installed, you must edit the corresponding ***.exe.config** or ***.dll.config** file in the installation location of the module. If these settings are not changed, the default operating system language and culture settings are used for the module.

Note: **Template Builder** always uses the default operating system language and culture settings.

To change the language and culture settings:

1. Locate the installation location of the module and open the corresponding ***.exe.config** or ***.dll.config** file in a plain-text editor, such as Notepad. Do not use a binary-text editor, such as Word, to edit this file.
2. Locate the **<Hyland.Canvas>** node.
3. Remove the comment tags (**<!--** and **-->**) from the **<DisplayLanguage>** node to enable it and display the module in a language different from the default operating system language. If this node remains commented, the default operating system language is used for the module.
4. Replace the value of the **<DisplayLanguage>** node with the language name of the language you want the module displayed in, such as **de-DE** for German or **fr-FR** for French (for more information on language names, see **http://msdn.microsoft.com/en-us/library/ms533052(VS.85).aspx**). The default value of this node is **en-US**.
5. Remove the comment tags (**<!--** and **-->**) from the **<Culture>** node to enable it and override the default Windows locale settings. If this node remains commented, the module displays dates, times, currencies, and numeric values using the default Windows locale settings configured in the Windows Regional and Language Options.
6. Replace the value of the **<Culture>** node with the culture name of the culture you want the module to use, such as **de-DE** for German or **fr-FR** for French. For a complete list of supported cultures, see the **Web Server** documentation. The default value of this node is **en-US**.
7. Save and close the file.

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.

Option	Description
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Controlling the Installer from the Command Line

The Hyland Office Integration installers can be run from an installation CD or a local drive.

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\\"my value\\" INSTALL_PROPERTY_2=\\"my value 2\\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Feature and Property Names

The following sections describe the feature and property names that can be applied to the command line to install and configure components contained in the Hyland Office Integration installers.

Features define the components that are installed. Properties define the configuration settings for the components that are installed.

Note: Property values passed through the command line are case-sensitive. For example, a property value is listed as **true** in one of the following sections. To use this property value, ensure you enter **true** with all lowercase letters.

Note: Due to customizable installation settings, command line scripts vary greatly and depend upon system configuration. Many command line properties have dependencies upon other properties, which, when absent from the script, may cause the installation to fail. For this reason, sample scripts are not included in these instructions. For assistance with creating a personalized command line script, contact your first line of support.

Feature Names

You can control the installation of components from the command line using the **ADDLOCAL** property. To install a component, pass its feature name to the installer using the **ADDLOCAL** property. The table below lists the feature names for each component in the Hyland Office Integration installers.

The **ADDLOCAL** property is appended to the end of the install command line, as shown here for the Office 2019 Integration installer: **msiexec /i "Office 2019 Integration x86.msi" ADDLOCAL=Word_AddIn, Excel_OfficeAddIn_Module**

This example installs the Microsoft Word and Excel add-ins. It also installs any components required by the features selected.

Note: Feature names are case sensitive and must be added to the command line exactly as they appear in this table. The associated properties listed may also have to be included on the command line in order to configure the installed component. For details on the associated properties see, Property Names on page 81.

Component	Feature Name
Word 20XX Add-In	Word_AddIn
PowerPoint 20XX Add-In	Powerpoint_AddIn
Excel 20XX Add-In	Excel_OfficeAddIn_Module
Excel Report Services Add-In	Excel_ReportServices_Module

Component	Feature Name
Outlook 20XX Integration	Outlook_Integration_Module
WorkView Integration for Outlook	Outlook_WorkviewIntegration_Module
Template Builder 20XX	Template_Builder

Installation Directory

All components are installed to the same directory. The following default locations are used:

- **Office 20XX (32-bit)**: C:\Program Files\Hyland\Office Integration\Office 20XX\
- **Office 20XX (64-bit)**: C:\Program Files (x86)\Hyland Office Integration\Office 20XX\

Note: In these example default locations, XX designates the year of the integration you have installed.

The default locations can be changed by using the following properties:

- **Office 2019 (32- or 64-bit):** OFFICE2019_FILES

For example, to change the default location of the Office 2019 files, add the following to the command line: **OFFICE2019_FILES="C:\MyInstall\Office2019\"**

Associated Properties

The following properties are associated with all of the features:

- SERVICE_LOCATION_DATA_SOURCE
- SERVICE_LOCATION_DISPLAY_NAME
- SERVICE_LOCATION_NT_AUTH
- SERVICE_LOCATION_SERVICE_PATH
- SERVICE_LOCATION_IDP_ENABLED_20XX (where XX designates the year of the integration installed)
- SERVICE_LOCATION_IDP_URL_20XX (where XX designates the year of the integration installed)

Note: Additional configuration is required to enable IdP support for the Hyland Office Products Installers. For more information, see the **Identity and Access Management Services** module reference guide.

Outlook Integration Associated Properties

The following properties are associated with the **Outlook Integration** and **WorkView Integration for Outlook** features:

- OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE
- OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS
- OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

- OUTLOOKINTEGRATION_CREATE_FORMS
- OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE
- OUTLOOKINTEGRATION_ENABLE_IMPORT_FROM_FILE
- OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES
- OUTLOOKINTEGRATION_HELP_BUTTON_OPTION
- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION
- OUTLOOKINTEGRATION_KEEP_MESSAGES
- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION
- OUTLOOKINTEGRATION_MOVE_MESSAGES
- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION
- OUTLOOKINTEGRATION_READING_GROUPS_BUTTON
- OUTLOOKINTEGRATION_REMOVE_MESSAGES
- OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION
- OUTLOOKINTEGRATION_SHOW_IMAGING
- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG
- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY
- OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION
- OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION
- OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION
- OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION
- OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION

Property Names

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following sections. The sections below list the property names available and the corresponding features that use them.

SERVICE_LOCATION_DATA_SOURCE

The data source name for the appropriate data source.

For example: **SERVICE_LOCATION_DATA_SOURCE="Data Source Name"**

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_DISPLAY_NAME

The user friendly name of the service location.

For example: **SERVICE_LOCATION_DISPLAY_NAME="My Service Location"**

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_NT_AUTH

Set to **true** to use NT/LDAP with the components installed. If this property is not included the default value of **false** is set and NT/LDAP authentication is not used.

Note: In order to use NT or LDAP authentication, the Data Source configured must also be configured for NT or LDAP authentication.

For example: **SERVICE_LOCATION_NT_AUTH="true"**

Optional when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

SERVICE_LOCATION_SERVICE_PATH

The full URL to the OnBase Application Server service page or Web Server address.

An Application Server URL should use the following format: **http://machinename/AppServer/Service.asmx**

A Web Server URL should use the following format: **http://machinename/AppNet/Service.asmx**

Note: Only Application Server and Web Server URLs ending in **.asmx** and using SOAP can be used with the Office integrations. For example, a remote service path ending in **.rem** is not valid.

Required when adding:

- Word_AddIn
- Powerpoint_AddIn
- Excel_OfficeAddIn_Module
- Excel_ReportServices_Module
- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module
- Template_Builder

OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE

The full path to the folder configuration file created using the **Folder Configuration Utility**.

For example:
OUTLOOKINTEGRATION_ADMIN_CONFIGURATION_FILE="C:\MyFiles\MyOutlook.confg"

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If you did not create a folder configuration file, do not include this property.

Note: See Outlook Folder Configuration Utility on page 61 for details on using the Folder Configuration Utility.

OUTLOOKINTEGRATION_CREATE_FORMS

Set to **true** to make the **Forms** button available on the Outlook Integration toolbar. This function allows users to create E-Forms or Unity Forms from Outlook. If this property is not included, the default value of **false** is set and the users cannot create E-Forms or Unity Forms from Outlook.

OUTLOOKINTEGRATION_ENABLE_IMPORT_FROM_FILE

Set to **true** to make the **Import from File** button available on the Outlook Integration toolbar. This function allows users to import selected documents into OnBase. If this property is not included, the default value of **false** is set and users cannot import selected documents to OnBase from Outlook.

OUTLOOKINTEGRATION_HELP_BUTTON_OPTION

Set to **true** to make the **Help** button available on the Outlook Integration toolbar. This function provides users access to the relevant OnBase help files. If this property is not included the default value of **false** is set and the help files are not available to users from the Outlook Integration toolbar.

For example: **OUTLOOKINTEGRATION_HELP_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

Set to **true** to make the **Import** button available on the Outlook Integration toolbar. This function allows users to import messages directly to OnBase from Outlook. If this property is not included the default value of **false** is set and users cannot directly import email messages to OnBase from Outlook.

For example: **OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** one of the following related properties must also be set to **true**:

- OUTLOOKINTEGRATION_KEEP_MESSAGES
- OUTLOOKINTEGRATION_MOVE_MESSAGES
- OUTLOOKINTEGRATION_REMOVE_MESSAGES

If this property is set to **true** the following related properties are optional:

- OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS
- OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE
- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION
- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG
- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

Set to **true** to make the **Launch Client** button is available on the Outlook Integration toolbar. This function allows users to launch the OnBase Client directly from Outlook. If this property is not included the default value of **false** is set and users cannot launch the OnBase Client directly from Outlook.

For example: **OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

If this property is set to **true** the following related property is optional:

- OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES

OUTLOOKINTEGRATION_READING_GROUPS_BUTTON

Set to **true** to make the **My Reading Groups** button available on the Outlook Integration toolbar. This function allows users to open the **My Reading Groups** interface. This property is not included, the default value of **false** is set and users cannot display the **My Reading Groups** interface from Outlook.

OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION

Set to **true** to make the **Retrieval** button available on the Outlook Integration toolbar. This function allows users to retrieve documents archived in OnBase directly from Outlook. If this property is not included the default value of **false** is set and users cannot retrieve documents archived in OnBase directly from Outlook.

For example: **OUTLOOKINTEGRATION_RETRIEVAL_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_SHOW_IMAGING

Set to **true** to make the **Imaging** ribbon group, which includes the **Send to Scan Queue** and **Batch Processing** buttons, available on the Outlook Integration toolbar. These functions allow users to route messages and attachments into a scan queue or batch process. If this property is not included, the default value of **false** is set and users cannot access these functions from Outlook.

Note: The **Send to Scan Queue** option does not populate mail System Keywords (such as MAIL To).
If you need to populate mail System Keywords, open the document in Workflow and use the **Set Property from Email Metadata** action. For more information, see the **Workflow** module reference guide.

OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION

Set to **true** to make the **Workflow** button available on the Outlook Integration toolbar. This function allows users to launch the OnBase Workflow Client directly from Outlook. If this property is not included the default value of **false** is set and users cannot launch the OnBase Workflow Client directly from Outlook.

For example: **OUTLOOKINTEGRATION_WORKFLOW_BUTTON_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION

Set to **true** to update Workflow email notifications after a task is executed, to include specific information on the ad hoc task that was executed. If this property is not included the default value of **false** is set and Workflow email notifications are not updated.

For example: **OUTLOOKINTEGRATION_WORKFLOW_UPDATE_NOTIFICATION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION

If set to **true**, the default settings of this deployment instance override the settings of clients installed using an earlier version of this deployment instance. For example, this option must be set to true to overwrite previously configured command-line switches. If this property is not included the default value of **false** is set and the settings of clients using an earlier version of the deployment instance can be used.

For example: **OUTLOOKINTEGRATION_UPDATE_CLIENT_DEFAULT_OPTION="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

If this property is set to **true** the following related property must also be set to **true**:

- OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION

OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION

Set to **true** to allow users to change the configuration of their Outlook folders. If this property is not included the default value of **false** is set and users cannot change the configuration of their Outlook folders.

For example: **OUTLOOKINTEGRATION_USER_FOLDER_CONFIGURATION_OPTION= "true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION

Set to **true** to allow users to change the default configuration of the Outlook Integration toolbar. If this property is not included the default value of **false** is set and users cannot change the default configuration of the Outlook Integration toolbar.

For example: **OUTLOOKINTEGRATION_USER_TOOLBAR_CONFIGURATION_OPTION= "true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS

Set to **true** to automatically select all email attachments when importing email messages into OnBase. If this property is not included the default value of **false** is set and email attachments are not automatically selected when importing email messages into OnBase.

Note: With either setting, users can still modify which email attachments are actually included before the message is imported into OnBase.

For example: **OUTLOOKINTEGRATION_AUTO_SELECT_ATTACHMENTS="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Expected when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE

Set to **true** to use the date that an email was sent as the **Document Date** for the message when it is imported into OnBase. If this property is not included the default value of **false** is set and the date the email message was imported into OnBase is used as the **Document Date**.

Note: If this property is set to **true** and an email does not have a **Received Time** value, the current date is used.

For example: **OUTLOOKINTEGRATION_DOCUMENT_DATE_SENT_DATE="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Expected when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_KEEP_MESSAGES

Set to **true** to keep email messages that are imported into OnBase in the same Outlook folder after being imported.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_MOVE_MESSAGES** or **OUTLOOKINTEGRATION_REMOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_KEEP_MESSAGES="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_MOVE_MESSAGES

Set to **true** to move email messages that are imported into OnBase to a different Outlook folder after being imported.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_KEEP_MESSAGES** or **OUTLOOKINTEGRATION_REMOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_MOVE_MESSAGES="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION

OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION

The Outlook folder to move imported email messages to if **OUTLOOKINTEGRATION_MOVE_MESSAGES** is set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_MOVE_MESSAGE_LOCATION="Imported Messages"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_MOVE_MESSAGES

OUTLOOKINTEGRATION_REMOVE_MESSAGES

Set to **true** to delete email messages after they are imported into OnBase.

If this property is not included the default value of **false** is set and either **OUTLOOKINTEGRATION_KEEP_MESSAGES** or **OUTLOOKINTEGRATION_MOVE_MESSAGES** must be set to **true**.

Note: This setting does not apply to email messages imported into OnBase using an Auto Import Folder.

For example: **OUTLOOKINTEGRATION_REMOVE_MESSAGES="true"**

Required when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

OUTLOOKINTEGRATION_STORE_MESSAGE_MSG

Set to **true** to archive messages in OnBase in their native Outlook format (*.msg). When messages stored in this format are retrieved, they are displayed in the Outlook message viewer instead of the OnBase document viewer. However, this allows users to access all of the same Outlook functionality that is available when the message is opened in Outlook (e.g., forwarding, replying, etc.).

Set to **false** to archive messages in the format in which the message was created (e.g., plain text, rich text, or HTML). When messages are retrieved, they are displayed in the OnBase document viewer. Attachments and messages are stored as separate documents and are retrieved in their respective file formats.

Note: When this option is set to **true**, users are unable to view the message that is being imported by clicking the envelope icon in the **Import Mail Document** dialog box. This may prevent messages from being indexed incorrectly.

For example: **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG="true"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following property is set to **true**:

- OUTLOOKINTEGRATION_IMPORT_BUTTON_OPTION

If this property is set to **true** the following related property is required:

- OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY

Set to **true** to store attachments as separate documents from the messages they are attached to when **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is also set to **true**. Attachments are stored and retrieved in their respective file formats and the **Attachment(s)** button is available in the **Import Mail Document** dialog box, if the message has attachments.

Set to **false** to store all attachments in the same *.msg file as the message they are attached to when **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is also set to **true**. The **Attachment(s)** button is not available in the **Import Mail Document** dialog box.

Note: This property does not need to be set if **OUTLOOKINTEGRATION_STORE_MESSAGE_MSG** is set to **false**. If this property is not included it is set to the default value of **false**.

For example: **OUTLOOKINTEGRATION_STORE_MESSAGE_SEPARATELY="false"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Optional when the following related property is set to **true**:

- OUTLOOKINTEGRATION_STORE_MESSAGE_MSG

OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH

The full path to the OnBase Client executable.

For example: **OUTLOOKINTEGRATION_CLIENT_EXE_FILE_PATH="C:\Program Files\Hyland\Client\"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Required when the following related property is set to **true**:

- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES

Any OnBase command line switches to append to the OnBase Client when it is launched from Outlook.

Tip: For more information on command line switches, see the **Command Line Switches** section in the **System Administration** module reference guide.

For example: **OUTLOOKINTEGRATION_EXE_COMMANDLINE_SWITCHES="-SCHED"**

Optional when adding:

- Outlook_Integration_Module
- Outlook_WorkviewIntegration_Module

Optional when the following related property is set to **true**:

- OUTLOOKINTEGRATION_LAUNCH_CLIENT_OPTION

Release of Information (Unity)

Administration Guide

Foundation EP5

Configuring a New ROI System

Before configuring the Release of Information module in a newly licensed system, see the following sections:

- Specifying the ROI Mode on page 92
- Disabling Access to Legacy Release of Information on page 93

Specifying the ROI Mode

The first time you access Release of Information **System Settings** in OnBase Configuration, you are prompted to specify which mode of ROI your organization would like to use. You only need to specify a mode one time.

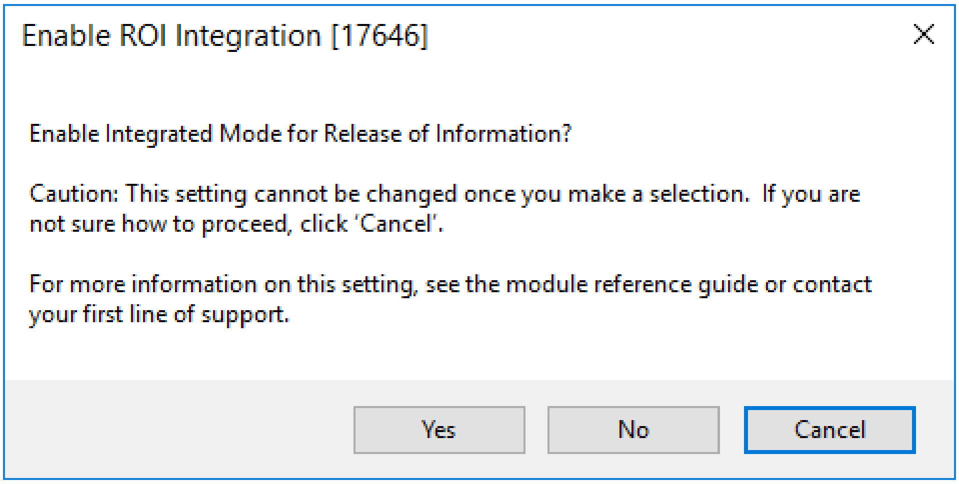
Caution: Once you specify the mode of ROI for a newly licensed system, it cannot be changed. Carefully read the process below to understand how you should select the appropriate mode.

To select an ROI mode:

1. Launch OnBase Configuration.
2. Navigate to **Medical | Release of Information | System Settings**.

   The **Enable Integrated Mode** dialog box is displayed.

Tip: If the **Enable Integrated Mode** dialog box is not displayed and other **Release of Information** menu options are enabled, your ROI mode has already been selected. No further action is required. If you believe you are using the incorrect mode of ROI, contact your first line of support.



3. Click the appropriate button:

Caution: Once you specify the mode of ROI for a newly licensed system, it cannot be changed. Carefully read the descriptions of the options below before making your selection.

- **Yes** - Enables Integrated Mode. Integrated Mode is typically used in addition to another ROI solution (e.g., Epic ROI) and contains only functionality necessary to locate, gather, and release OnBase medical records documents.
- **No** - Enables non-Integrated Mode. Non-Integrated Mode is typically used as a primary ROI solution. It contains functionality necessary to locate, gather and release OnBase medical records documents, while also allowing users to leverage requester-related functionality such as the ability to store requester information, bill requesters, and generate rejection letters to requesters.
- **Cancel** - Does not enable any mode. If you are unsure how to proceed, click **Cancel** and contact your first line of support.

Upon selecting either **Yes** or **No**, the **Release of Information System Settings** dialog box is displayed, and your ROI system is now either using Integrated Mode or non-Integrated Mode, respectively.

Note: If you selected **Yes**, refer to the **Release of Information (Integrated)** module reference guide and help file going forward. If you selected **No**, refer to the **Release of Information** module reference guide and help file going forward. This should be clearly communicated to all users and administrators.

Disabling Access to Legacy Release of Information

If your system is licensed for Release of Information in addition to one of the legacy versions of ROI, it is strongly recommended you restrict user access to ROI in the OnBase Client to avoid potential confusion. By default, users are able to access ROI in the OnBase Client when your system is licensed for one of the following.

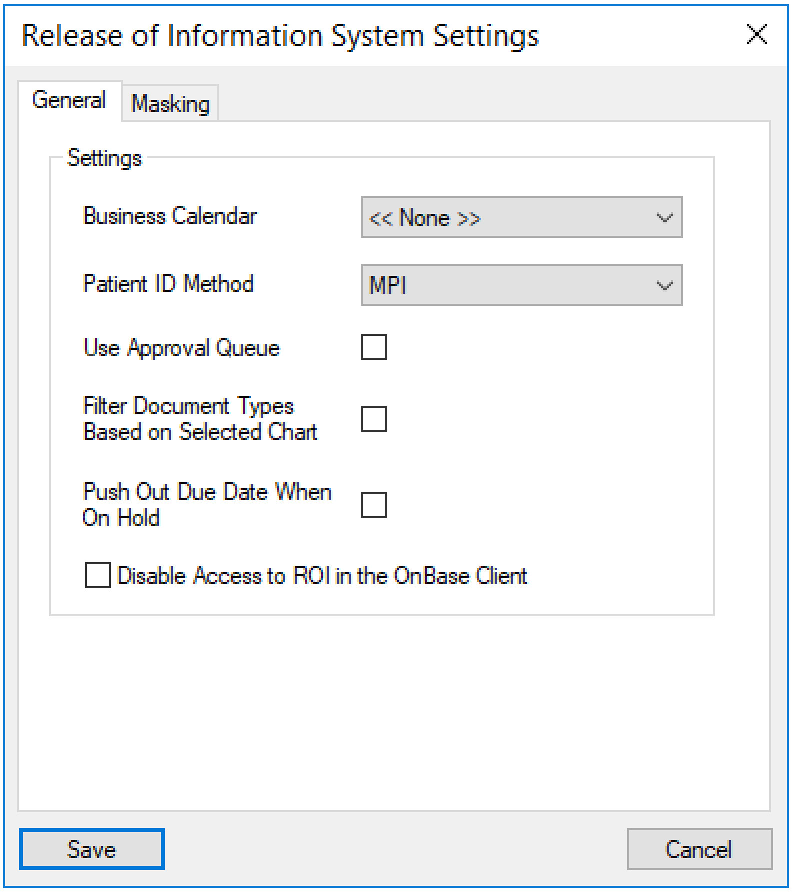
- Medical Records Release of Information
- Medical Records Release of Information (Standalone)

Requests created in the OnBase Client are not displayed in the Medical Records Unity Client and vice versa.

To disable access to ROI in the OnBase Client:

1. From the Configuration module, navigate to **Medical | Release of Information | System Settings**.

   The **Release of Information System Settings** dialog box is displayed.



2. Select the **Disable Access to ROI in the OnBase Client** option.

Note: This option is not displayed if you are not licensed for Medical Records Release of Information or Medical Records Release of Information (Standalone).

3. Click **Save**. Users are now restricted from accessing ROI functionality in the OnBase Client.

Configuring User Group Rights

This section provides the User Group configuration specific to Release of Information only.

For additional information regarding User Group, User, Document Type and Keyword Type configuration, see the System Administration module reference guide or help file.

Configuring ROI Privileges

To grant ROI privileges:

1. From the Configuration module, select **Users | User Groups/Rights**.
2. Select a User Group.

3. Click **Medical Rec Privileges**. The **Medical Records Privileges** dialog box is displayed.
4. Select the **ROI** tab.
5. Assign the Release of Information privileges you want to grant the User Group.

Note: A user must be granted one or more of the following privileges to access the Release of Information layout in the Medical Records Unity Client.

Privilege	Description
Create	Allows users to create new ROI requests. **Note:** Users who only have this privilege can only create a request from the ROI interface. They cannot create them from other contexts (e.g., Chart Search).
Fulfill	Allows users to modify and perform actions on an ROI request. A user with this privilege can do the following: • Add external items to the request. • Add charts and documents to a request. • Remove charts and documents from a request. • Change the order of documents in a request.
Approve	Allows users to approve requests.
Cancel	Allows users to cancel and reject requests. When a request is canceled or rejected, it is no longer able to be modified. Rejected requests are able to be restored if needed later.
User Assignment	Allows users to assign requests to other users. Assigning a request to another user grants only that user the ability to modify the request. The request is read-only to all other users. Assigning requests should be used as a way to designate who is supposed to be fulfilling the request.
Productivity Reports	Allows users to generate ROI reports from the **Admin** menu in the OnBase Client.

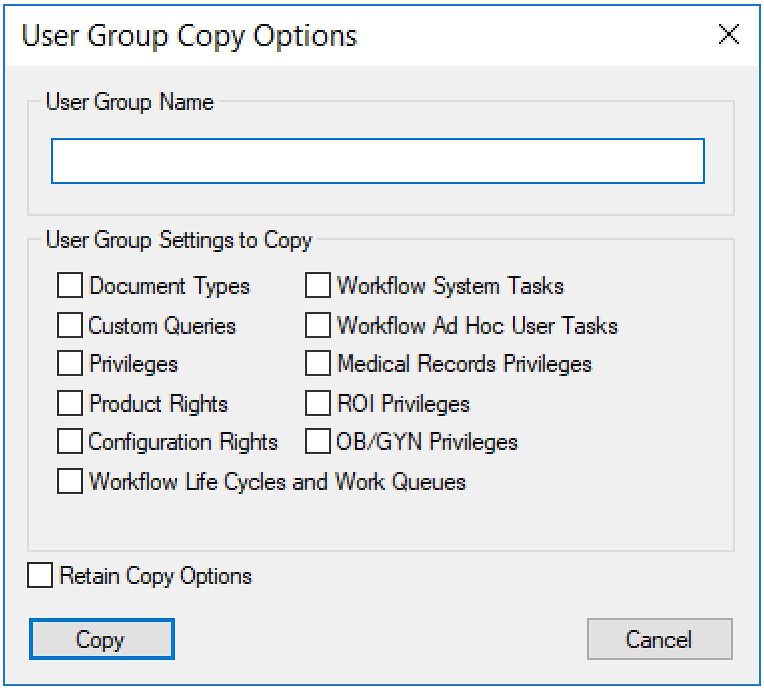
6. Click **Save** to accept the setting and return to the **User Groups & Rights** dialog box.
7. Repeat the process for all ROI User Groups.

Copying ROI Privileges to New User Groups

When you create a new User Group, you can copy the ROI privileges from an existing User Group. To create a new User Group with inherited privileges, do the following:

1. Select **Users | User Groups / Rights** to display the **User Groups & Rights** dialog box.
2. Select the User Group whose privileges you want to copy.

3. Click **Copy**. The **User Group Copy Options** dialog box is displayed.



4. Enter the name of the new User Group that should inherit settings from the existing User Group.
5. Select the appropriate **User Group Settings to Copy** from the existing User Group to the new User Group.

   The **ROI Privileges** setting includes all **Release of Information** privileges located in the **Medical Records Privileges** dialog box.
6. Select **Retain Copy Options** to have the current settings automatically selected the next time you access this dialog box.
7. Click **Copy**. The new User Group is created with the selected rights and privileges.

Configuring Log Privileges

For reporting purposes, the ROI Request Log tracks information for all ROI requests created in OnBase. To generate Release of Information reports or to purge the ROI Request Log, users must have sufficient privileges.

To assign ROI Request Log privileges:

1. From the Configuration module, select **Users | User Groups/Rights**.
2. Select a User Group and click **Log Privileges**.
3. Select the appropriate check box next to **ROI Request Log**:
   - To allow users to generate ROI reports, select the **View** column check box.
   - To allow users to purge the ROI Request Log, select **Purge** column check box.
4. Click **Save**.

Configuring Facilities

Before configuring ROI, be sure to configure all facilities that need to process ROI requests.

See the following topics:

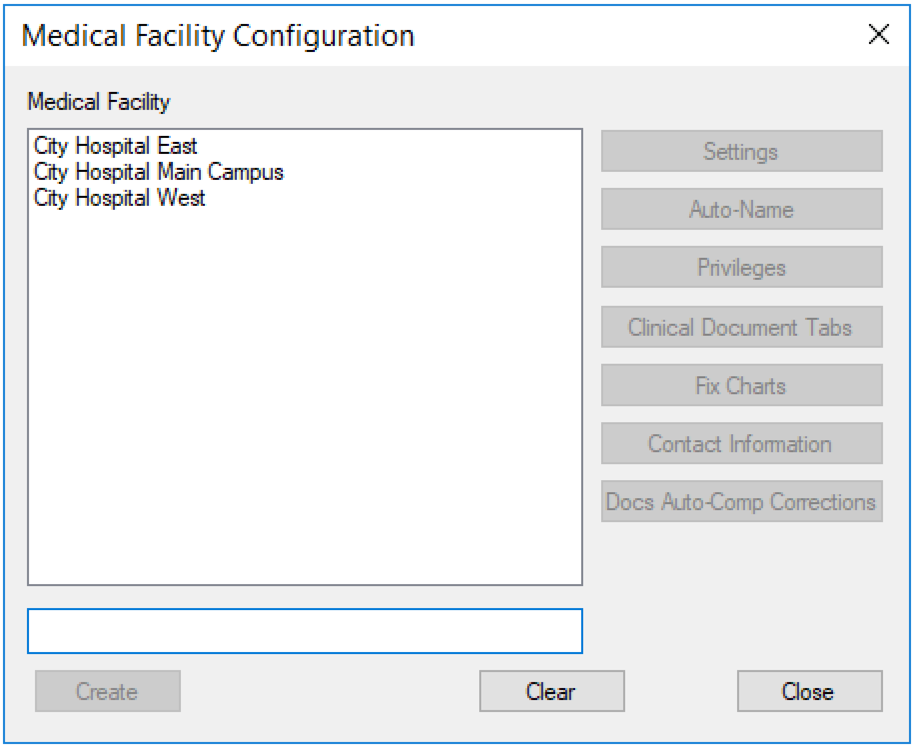
- Creating a Facility on page 97
- Assigning Facility Privileges on page 98
- Configuring Facility Contact Information on page 99

Creating a Facility

When an ROI request is created, it is assigned to a configured facility. Facilities are created in OnBase Configuration.

To create a facility:

1. Select **Medical | Facilities | Facility Configuration**. The **Medical Facility Configuration** dialog box is displayed.



Note: The **Medical Facility Configuration** dialog box may include additional configuration options, depending on system licensing. This procedure addresses only the configuration steps necessary for ROI.

2. Type the name of a facility in the field provided.
3. Click **Create**. The name is added to the **Medical Facility** list.
4. Assign users privileges to the facility. See Assigning Facility Privileges on page 98.

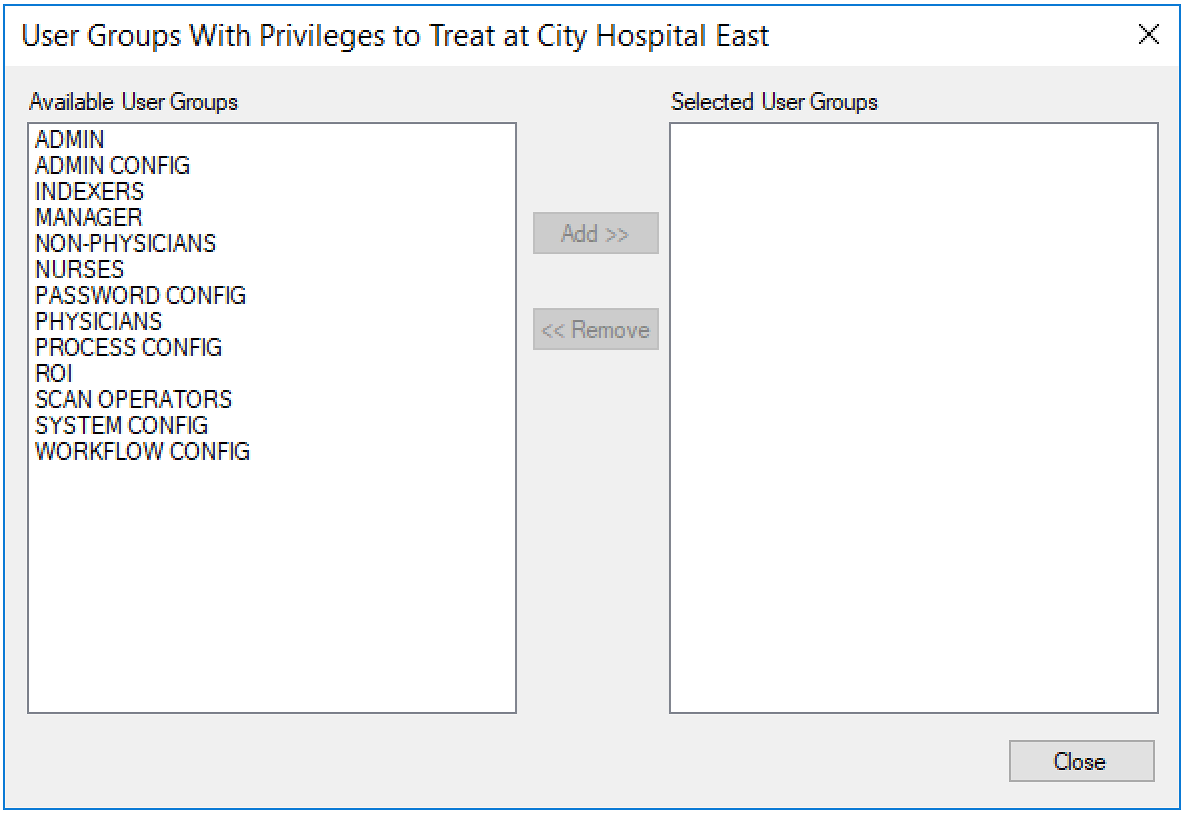
Assigning Facility Privileges

To create or view an ROI request for a facility, users must have privileges to the facility. Assign users privileges to all facilities where they need to create or manage ROI requests.

Facility privileges may also affect chart access in the Medical Records Unity Client and OnBase Client. For more information, see the **Medical Records Unity Client** module reference guide.

To assign facility privileges:

1. Select a facility from the **Medical Facility Configuration** dialog box.
2. Click **Privileges**. The **User Groups with Privileges to Treat** dialog box is displayed.



3. From the **Available User Groups** list, select a User Group.
4. Click **Add** to add the User Group to the **Selected User Groups** list.
5. Repeat for all User Groups that you want to assign to the facility.
6. Click **Close**.

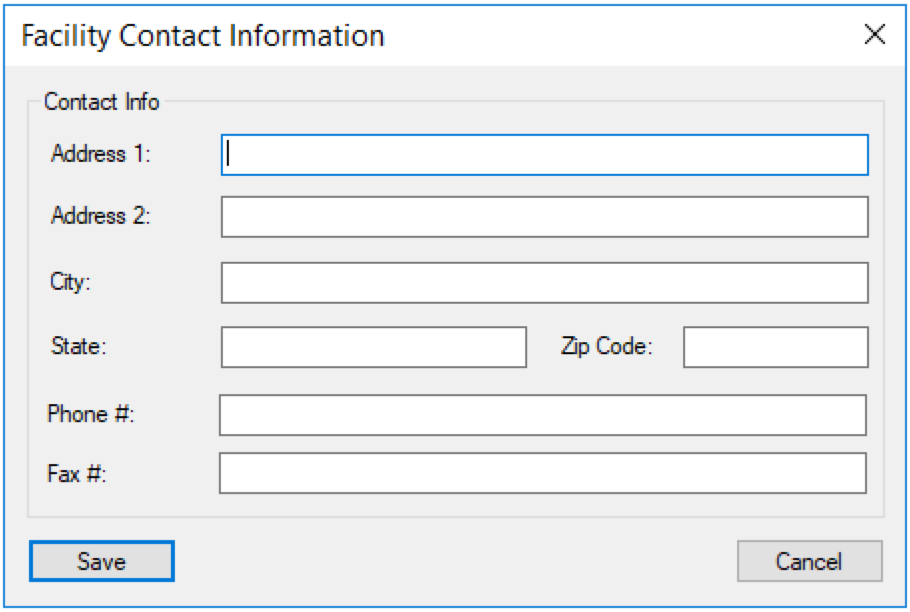
Configuring Facility Contact Information

Facility contact information can be used to populate facility placeholders used in ROI templates. These XML placeholders can include the facility address, city, state, zip code, phone number, and fax number.

Note: For more information on the corresponding XML paths, see Facility Information on page 210.

To configure contact information for a facility:

1. Select **Medical | Facilities | Facility Configuration**.
2. Select a facility from the **Medical Facility Configuration** dialog box.
3. Click **Contact Information**. The **Facility Contact Information** dialog box is displayed.



4. Enter the appropriate contact information in the form.
5. Click **Save**.

Requirements for Requested Documents

To be included in an ROI request, a document must belong to a Document Type that satisfies one of the following criteria:

- The Document Type belongs to a medical record Document Type Group. You can configure these Document Types to be attached to ROI requests by default, based on the Request Type.
- The Document Type is configured to be retrieved by the Medical Records Custom Query, which is selected under **Medical | User Interface Settings | Medical Client Settings**. You can configure Request Types to automatically attach Medical Records Custom Query documents to ROI requests.
- The Document Type is configured to be retrieved by a custom query that the fulfiller of an ROI request has rights to execute. The fulfiller of an ROI request can manually attach documents from a custom query when preparing the request for processing.

Other documents can be dynamically generated and added to a request packet by means of Document Composition templates. See Configuring ROI Facility Settings on page 145.

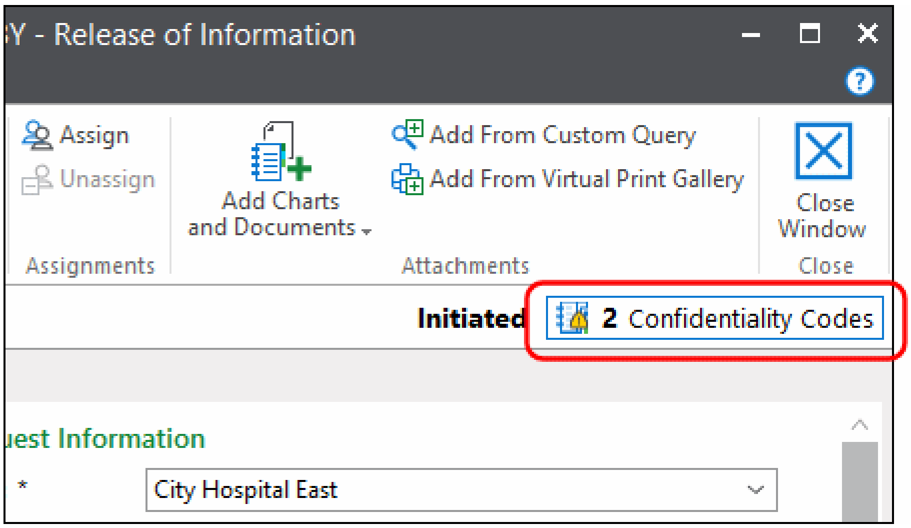
Avoiding Problems with Document Types

Certain Document Type configurations may impede or adversely affect the generation of ROI request packets. Please review the following considerations for information about potential conflicts:

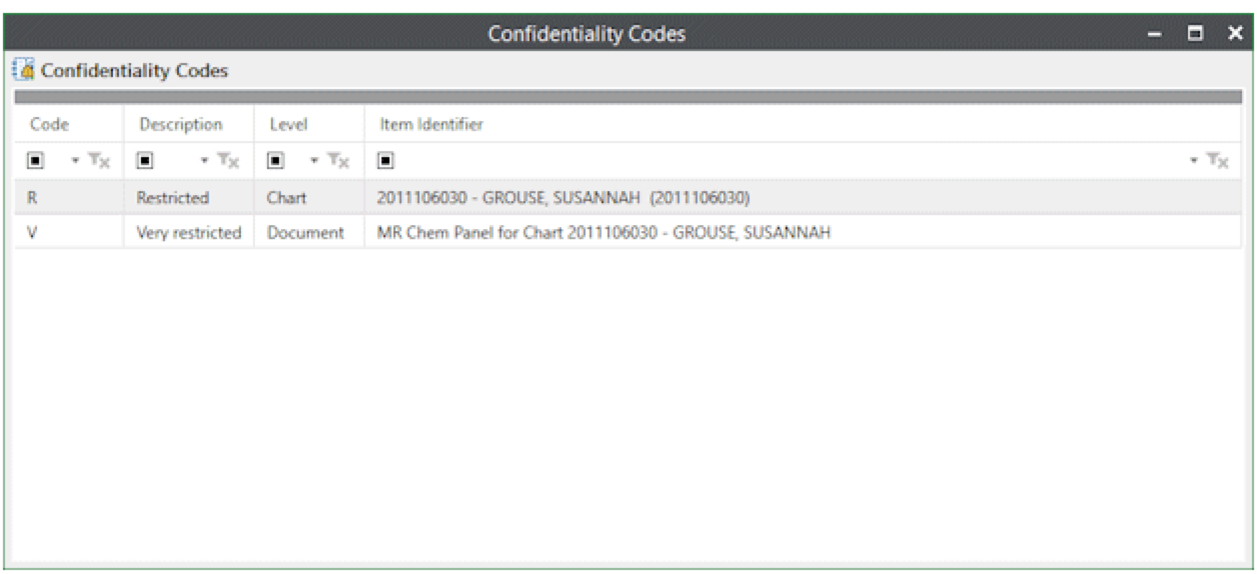
- PDFs that require a password to open the document are not supported in ROI request packets. If such a PDF is attached to an ROI request, packet generation for that request will fail.
- PCL documents containing a large number of pages (e.g., hundreds or thousands) may adversely affect the performance of request packet generation. If possible, break up large PCL documents into smaller documents with fewer pages.
- XML documents may not include page breaks where expected. If an XML Document Type is associated with a style sheet containing page breaks, the page breaks defined in the style sheet will not be respected when XML documents undergo the packet generation process.

Configuring Confidentiality Codes

On systems licensed for the HL7 module, confidentiality codes can be used to classify patients, charts, and documents as confidential. In the Medical Records Unity Client, ROI requests may display a confidentiality code notifier indicating the number of confidentiality codes in effect on items attached to the request.



Upon clicking the notifier, ROI users can view information about the confidentiality codes in effect.



For the confidentiality code notifier to be displayed:

- The **Enable Confidentiality Codes** setting must be selected in OnBase Configuration under **Medical | User Interface Settings | Unity | Settings**.
- The request must have attachments with confidentiality codes applied.
- The user viewing the ROI request must have rights to the confidentiality codes applied to attachments. Rights are assigned in OnBase Configuration under **Medical | Confidentiality Codes**.

Note: Confidentiality codes do not hide patients, charts, or documents in the Release of Information layout. Users with access to ROI requests do not require rights to confidentiality codes to see attachments with confidentiality codes applied. Rights to confidentiality codes are needed only to view information about confidentiality codes in effect on items attached to the request.

For information about confidentiality codes, including configuration steps and how they affect other contexts within the Medical Records Unity Client, see the **Medical Records Unity Client** documentation.

Configuring ROI

Release of Information provides the ability to fulfill ROI requests efficiently and quickly through printout, or save to file. The following topics include procedures for configuring ROI request types, system settings, and the ROI process.

- Pre-Configuration on page 103
- Configuring External Item Cost on page 105
- Creating a Rejection Reason on page 108
- Creating a Request Type on page 109
- Creating a Relationship on page 117
- Configuring Pricing Policies on page 117
- Configuring Display Columns on page 124
- Configuring Packet Templates on page 126
- Creating a Business Calendar on page 132
- Configuring ROI System Settings on page 136
- Configuring ROI Templates on page 141
- Configuring ROI Facility Settings on page 145

Pre-Configuration

In addition to the settings available from the Configuration module's **Medical | Release of Information** menu, the following items must be configured:

- Assign User Group Privileges for Release of Information. See Configuring ROI Privileges on page 94.
- Configure Document Types to store each of the following:
  - Cover sheets
  - Inventory pages
  - Bills
  - Rejection Letters
- Configure a Document Type to store requests. For more information on configuring this Document Type, see Configuring the ROI Archive Document Type on page 103.
- Create a **Request ID** Keyword Type. The Keyword Data Type should be defined as **Numeric (Up to 20 Digits)** and assigned to the Document Type that archives request.
- If you are using Release of Information with medical records charts, and you want to include non-medical record documents in ROI requests, ensure a Custom Query is configured to pull non-medical record documents into the chart. This Custom Query must be selected in **Medical Client Settings** configuration.

Note: This functionality is not available if you do not have an HL7 Listener license.

You can configure additional custom queries to allow users to retrieve and add documents to an ROI request manually. Ensure users have rights to these custom queries.

Configuring the ROI Archive Document Type

Configure a Document Type to archive ROI request packets after they are generated. If necessary, you can create a Document Type for each facility that uses the ROI module.

Ensure each ROI Archive Document Type follows the recommendations in the following topics:

- File Format on page 103
- Keyword Types on page 103
- Revisions on page 105

After an ROI Archive Document Type is configured, it can be assigned to one or more facilities. For more information on assigning the Document Type, see Configuring ROI Facility Settings on page 145.

File Format

Select **PDF** as the Default File Format for ROI Archive Document Types.

Keyword Types

When a packet is archived to the ROI Archive Document Type, it is indexed with applicable Keyword Values from the request.

Assign the **Request ID** Keyword Type to every Document Type used for archiving request packets. The **Request ID** value is automatically populated on the archived request packet. For more information on this Keyword Type, see Pre-Configuration on page 103.

Patient and Chart Metadata

If OnBase is licensed for HL7, you can assign patient and chart Keyword Types to the ROI Archive Document Type. These Keyword Types must be mapped to chart data fields under **Medical | Charts | Data Fields**.

The population of patient and chart Keyword Types varies depending on the system's **Patient ID Method** and whether the generated packet contains multiple patients or charts.

- If the **Patient ID Method** is MPI:

Packet Contains... Multiple MPIs?	Multiple MRNs?	Multiple Charts?	Keywords Populated
Yes	N/A	N/A	Request ID
No	Yes	N/A	Request ID MPI-Level Keywords
No	No	Yes	Request ID MPI-Level Keywords MRN-Level Keywords
No	No	No	Request ID MPI-Level Keywords MRN-Level Keywords Chart-Level Keywords

- If the **Patient ID Method** is MRN:

Packet Contains... Multiple MRNs?	Multiple Charts?	Keywords Populated
Yes	N/A	Request ID
No	Yes	Request ID MRN-Level Keywords
No	No	Request ID MRN-Level Keywords Chart-Level Keywords

For more information on the **Patient ID Method**, see General Settings on page 137.

Tip: Assign an AutoFill Keyword Set using the MPI or MRN as the primary value to automatically generate other Keyword Values for the packet.

Revisions

Make the ROI Archive Document Type revisable to allow multiple revisions of a request. Multiple revisions of a request can be created when a request packet is generated before the request is complete. If the Document Type is non-revisable in this scenario, when the request is complete, the final request packet overwrites the existing packet that was previously generated.

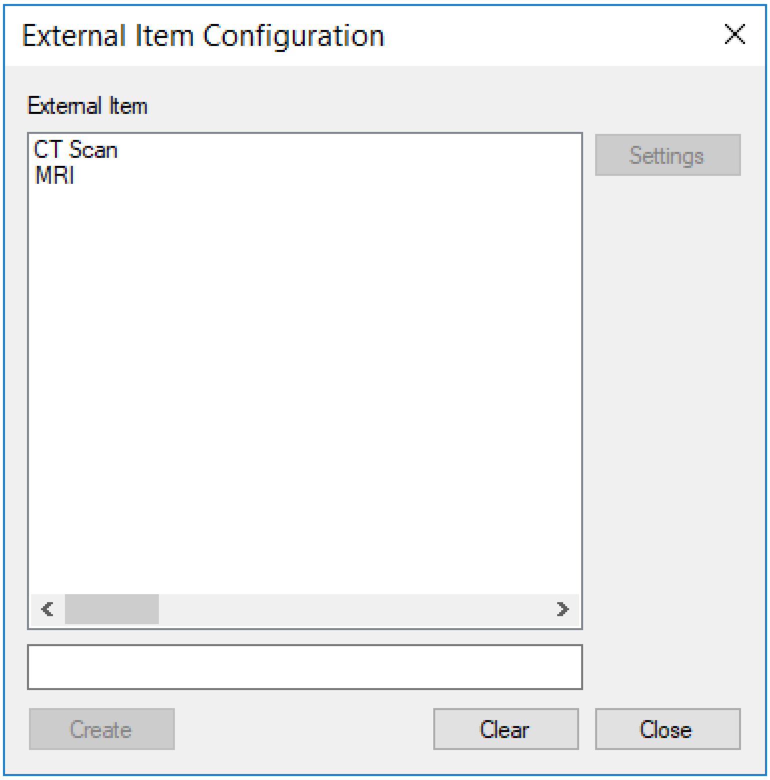
Note: You can only make a Document Type revisable when licensed for EDM Services. For more information on revisable Document Types, see the **EDM Services** documentation.

Configuring External Item Cost

External Item Configuration allows you to specify the cost for additional materials or media added to an ROI request. Once you link external items to a facility, they can be added to an ROI request in the Medical Records Unity Client.

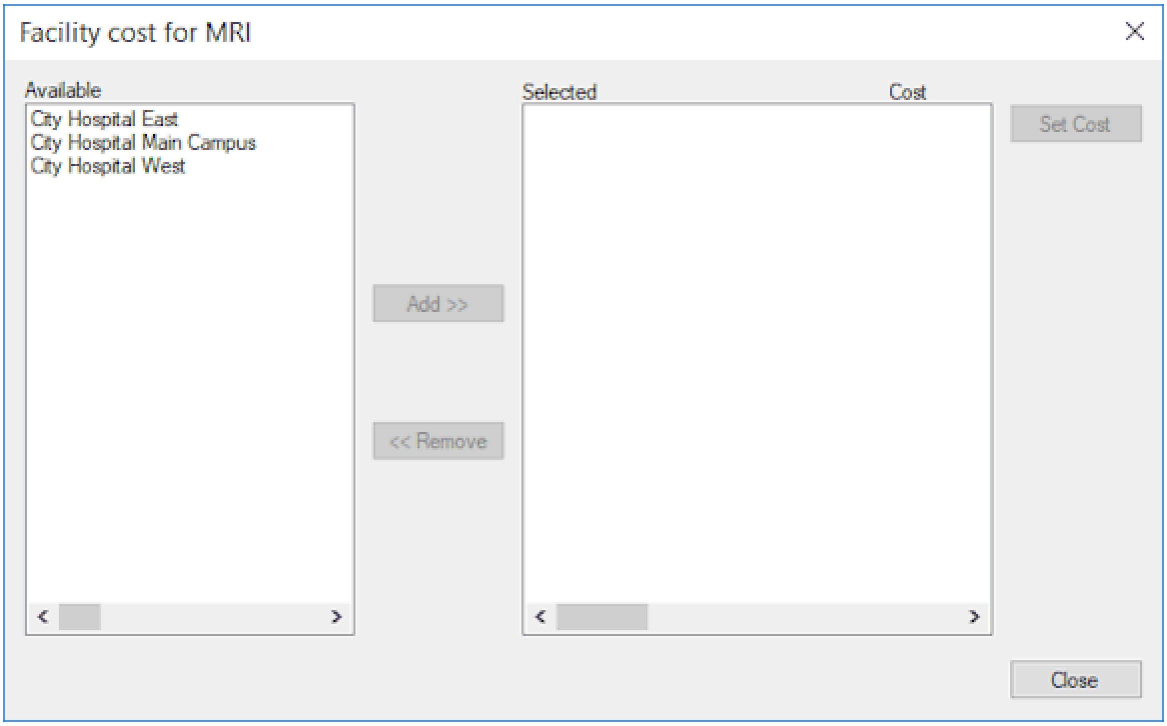
To configure the cost of an external item:

1. In the Configuration module, select **Medical | Release of Information | External Items**. The **External Items Configuration** dialog box is displayed.

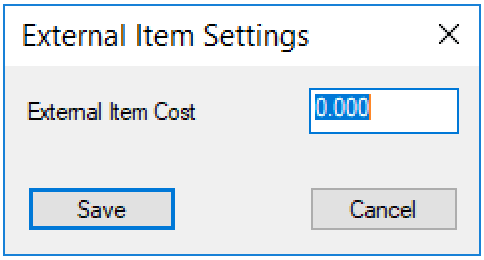


2. Type a name for the external item and click **Create**. The **Facility cost for** dialog box is displayed.

Note: Once you click **Create**, the external item cannot be removed. If you don't plan on assigning an external item to a facility, you should rename it to **Do Not Use**, or something similar. To rename an external item, double-click the item in the **External Item Configuration** dialog box and enter a new name.



3. Select the appropriate facility and click **Add**.
4. Click **Set Cost**.
   The **External Item Settings** dialog box is displayed.



5. Click **Save**.

Creating a Rejection Reason

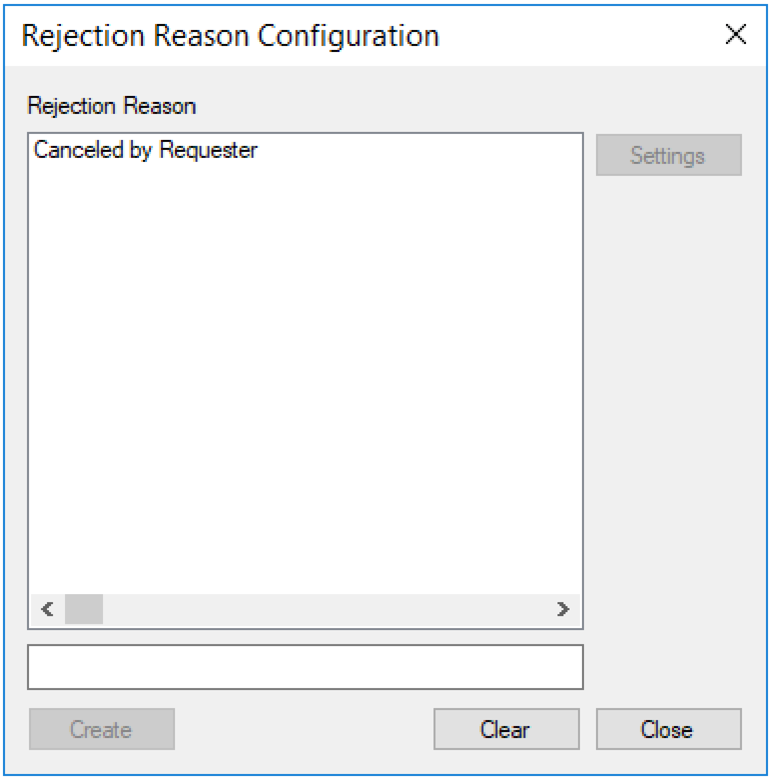
The Release of Information module allows you to create rejection reasons and associate them with facilities.

When a user chooses to reject an ROI request in the Medical Records Unity Client, the **Cancel / Reject Request** dialog box is displayed. From this dialog box, the user can select a configured rejection reason and print an configured rejection letter to send to the requester.

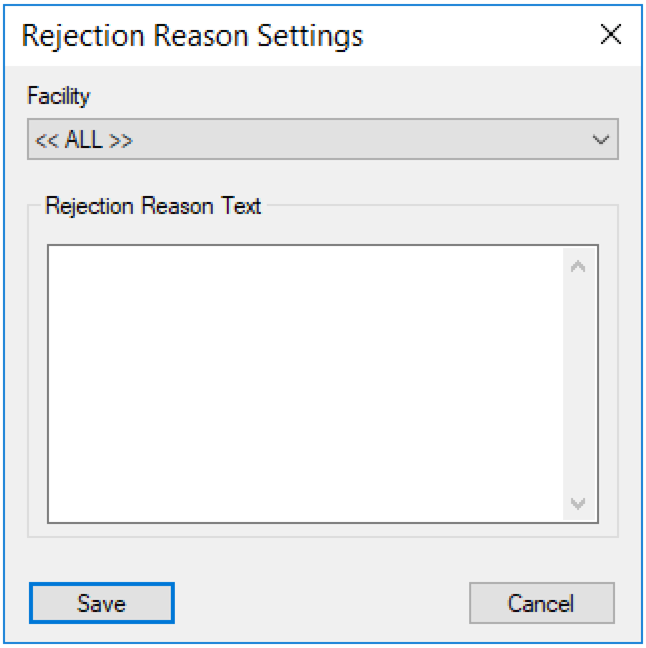
Note: For more information on configuring rejection letters, see Configuring ROI Templates on page 141. For more information on assigning a rejection letter template to a facility after it has been created, see Specifying Templates for a Facility on page 150

To create a rejection reason:

1. In the Configuration module, select **Medical | Release of Information | Rejection Reasons**. The **Rejection Reason Configuration** dialog box is displayed.



2. Type a name for the rejection reason and click **Create**. The **Rejection Reason Settings** dialog box is displayed.



3. Select a facility for the rejection reason using the **Facility** drop-down. This allows each facility to have its own set of rejection reasons.

   If you do not specify a facility, the rejection reason will be available to all facilities by default.
4. Enter any notes or explanations in the **Reject Reason Text** field to provide more information about the rejection reason.
5. Click **Save**.

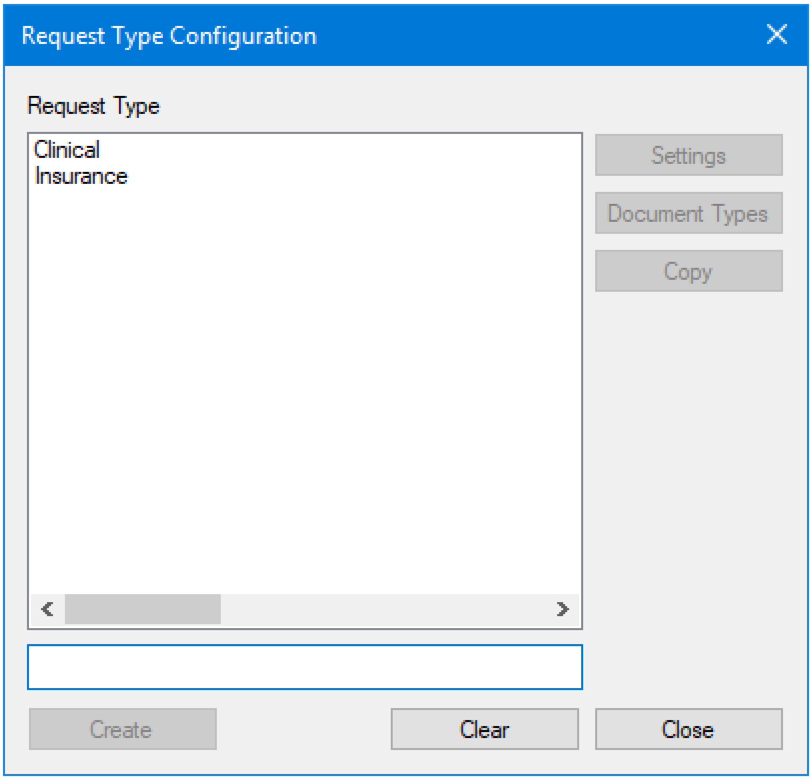
Creating a Request Type

Request Type Configuration allows you to create standard request types for typical ROI requests. Request Types determine the billing options and default document sort order.

When creating a request, a user must choose a Request Type to specify the purpose for the request. Available Request Types are determined by the selected facility. You can assign a Request Type to one or all facilities.

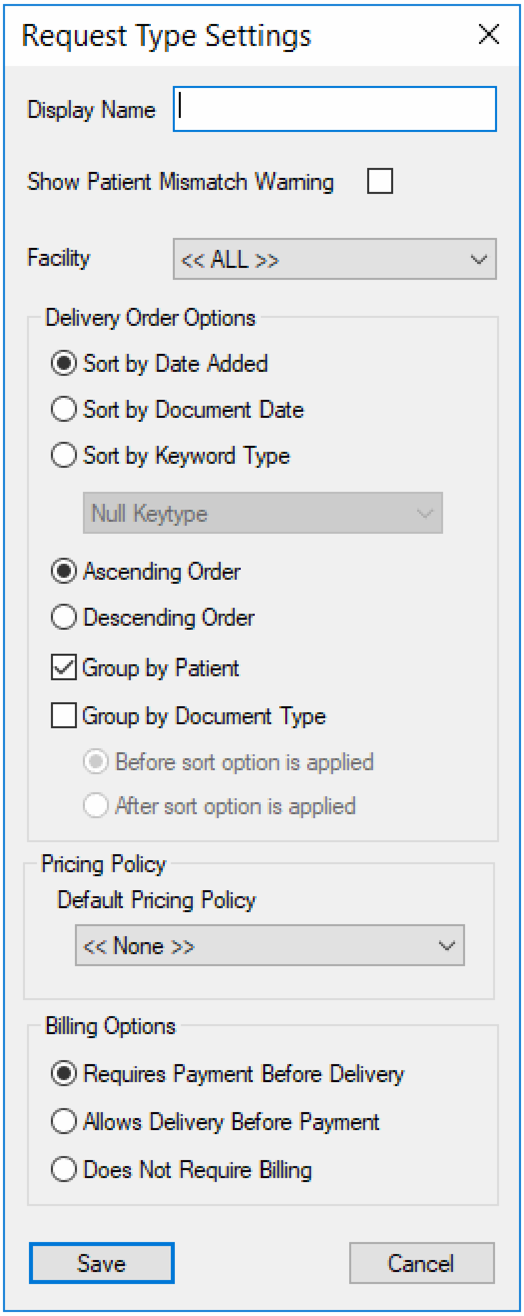
To create and configure a Request Type:

1. In the Configuration module, select **Medical | Release of Information | Request Types**. The **Request Type Configuration** dialog box is displayed.



2. Type a name for the Request Type and click **Create**. To modify an existing Request Type, select it from the list and click **Settings**.

   The **Request Type Settings** dialog box is displayed.


Request Type Settings
Display Name
Show Patient Mismatch Warning
Facility
<< ALL >>
Delivery Order Options
Sort by Date Added
Sort by Document Date
Sort by Keyword Type
Null Keytype
Ascending Order
Descending Order
Group by Patient
Group by Document Type
Before sort option is applied
After sort option is applied
Pricing Policy
Default Pricing Policy
<< None >>
Billing Options
Requires Payment Before Delivery
Allows Delivery Before Payment
Does Not Require Billing
Save
Cancel

3. Enter the appropriate **Request Type Settings**.

Request Type Setting	Description
Display Name	Enter a display name for the Request Type in the **Display Name** field. If multiple facilities use similar but different Request Types, you may consider differentiating these at the Request Type level and making the display name something more generic (e.g., **Legal**, **Personal**, **Doctor-to-Doctor**, etc.).
Show Patient Mismatch Warning	Select the **Show Patient Mismatch Warning** option to prompt users when charts or documents on a request belong to different patients. The prompt is shown in the following scenarios: • When a user attaches charts and/or documents for a patient other than the patients currently attached to the request. • When changing the Request Type of a request from one that does not have this option selected to a Request Type that does have this option selected, and the request contains charts and/or documents with different MRNs or MPIs. **Note:** The **Show Patient Mismatch Warning** option is not available if you do not have an HL7 Listener license.
Facility	Use the **Facility** drop-down to specify which facility you'd like the Request Type to be linked to. If you do not specify the facility, the Request Type is available for all facilities by default.

4. Select a **Delivery Order Option** to configure the default order in which request documents are sorted for delivery. Users can manually modify the sort order for individual requests in the Medical Records Unity Client.

Delivery Order Option	Description
Sort by Date Added	Documents are sorted by the date and time they were added to the request.
Sort by Document Date	Documents are sorted by their Document Dates.
Sort by Keyword Type	Documents are sorted by their values for the selected Keyword Type. From the drop-down, select the Keyword Type to sort by. **Note:** Documents without a value for the selected Keyword Type may need to be sorted manually.
Ascending Order	Documents are sorted in ascending order.
Descending Order	Documents are sorted in descending order.

Delivery Order Option	Description
Group by Patient	Documents are grouped by patient. This option applies to requests with multiple patients attached. This option is selected by default. When this option is selected, documents in the request are first grouped by patient before any other grouping or sorting options are applied. This option does not affect requests where the **Separate by Chart** option is selected on the release order screen. When **Separate by Chart** is selected, request documents are grouped by patient automatically.
Group by Document Type	Documents are grouped by Document Type. This option is used in conjunction with the **Sort by** options, described above. Select one of the following options: • **Before sort option is applied** - Documents are first grouped by Document Type and then sorted by the selected **Sort by** option (i.e., because the Document Type sort is primary, all documents of a Document Type are grouped and listed together). • **After sort option is applied** - Documents are first sorted by the selected **Sort by** option and then grouped by Document Type within the selected sorting (i.e., because the Document Type sort is secondary, all documents of a Document Type may not be listed together). **Note:** Users cannot manually group documents by Document Type after a sort option is applied. They can only group documents by Document Type before the sort option is applied.

5. Select a **Pricing Policy** for this Request Type. Available pricing policies are dependent on the selected facility. If you did not select a facility, all pricing policies are available from the drop-down list. If you do not specify the pricing policy, all pricing policies are available to users working with this Request Type.
6. Select a **Billing Option** for this Request Type:

Billing Option	Description
Requires Payment Before Delivery	Payment must be received prior to delivery.
Allows Delivery Before Payment	Requests can be delivered prior to receiving payment. **Note:** Users can override this option on a per-requester basis by selecting the **Require Prepayment** option in a requester record. A user may decide to do this if, for example, the requester is delinquent paying bills.
Does Not Require Billing	No billing will take place.

7. Click **Save** to accept the settings and exit the **Request Type Settings** dialog box.
8. If you are using ROI with medical records charts, proceed to the next topic, Choosing Chart Document Types to Include on page 114.

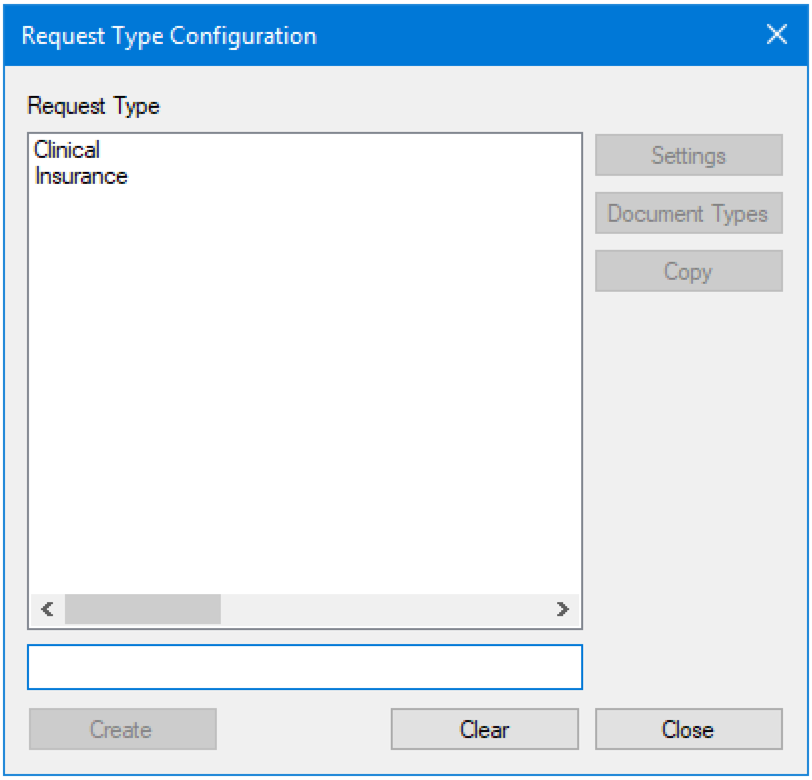
Choosing Chart Document Types to Include

You can choose the default Document Types to be included for ROI Request Types. Users are also able to manually add Document Types using the **Add Attachments** wizard in the ROI interface.

Note: Only systems with an HL7 Listener license can configure Request Types to include default Document Types.

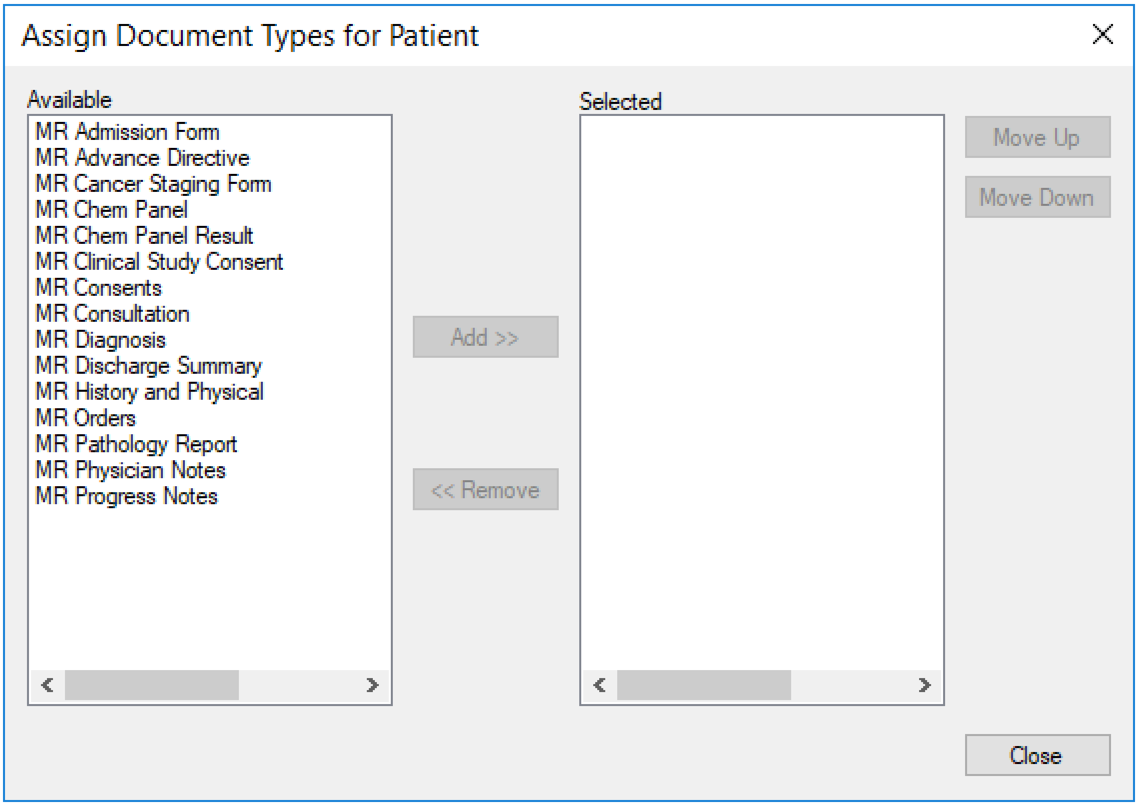
Note: If you need to use certain Document Types to retrieve external system documents, these Document Types either must belong to a Medical Records Document Type Group, or they must be retrieved using the Medical Records Custom Query. External document retrieval is only available if your system is licensed for Report Capture for Meditech.

1. Select the Request Type from the **Request Type Configuration** dialog box.



2. Click **Document Types**. The **Assign Document Types** dialog box is displayed.

Note: The **Document Types** button is not available if you do not have an HL7 Listener license.



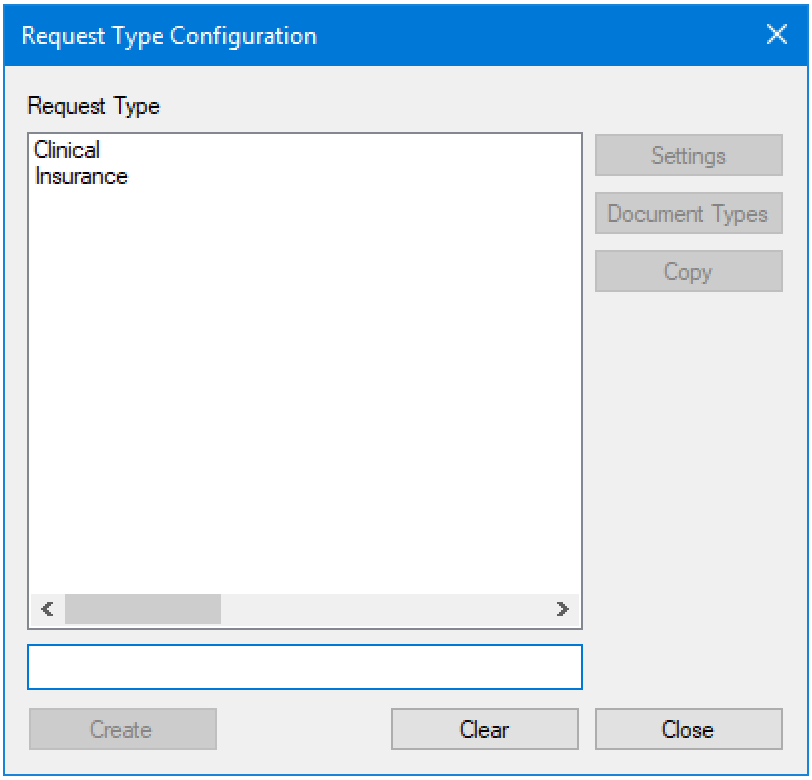
3. From the **Available** list, select any Document Type that should be included in all requests for this Request Type.
4. If the Request Type is set up to group documents by Document Type, configure the default order in which Document Types should be printed. To change a Document Type's position in the sequence, select it and click the **Move Up** or **Move Down** button.
5. Click **Close** when finished.

Copying Existing Request Types

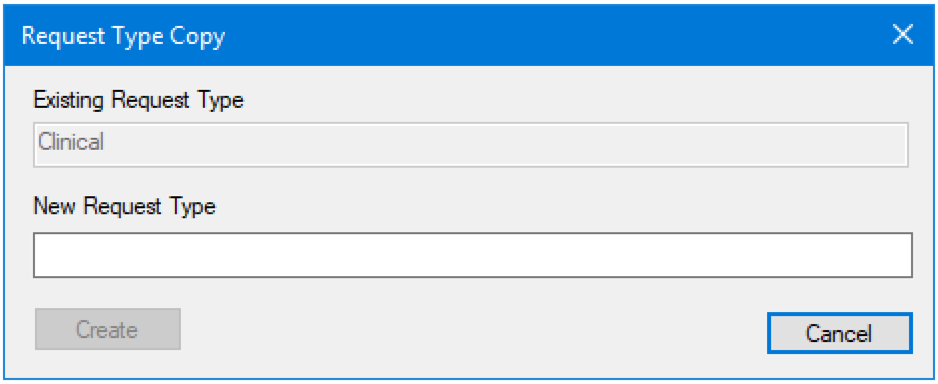
When you create a new Request Type, you can copy the settings and Document Types assigned from an existing Request Type.

To copy an existing Request Type:

1. In the Configuration module, select **Medical | Release of Information | Request Types**. The **Request Type Configuration** dialog box is displayed.



2. Select an existing Request Type from the **Request Type** list.
3. Click **Copy**. The **Request Type Copy** dialog box is displayed.



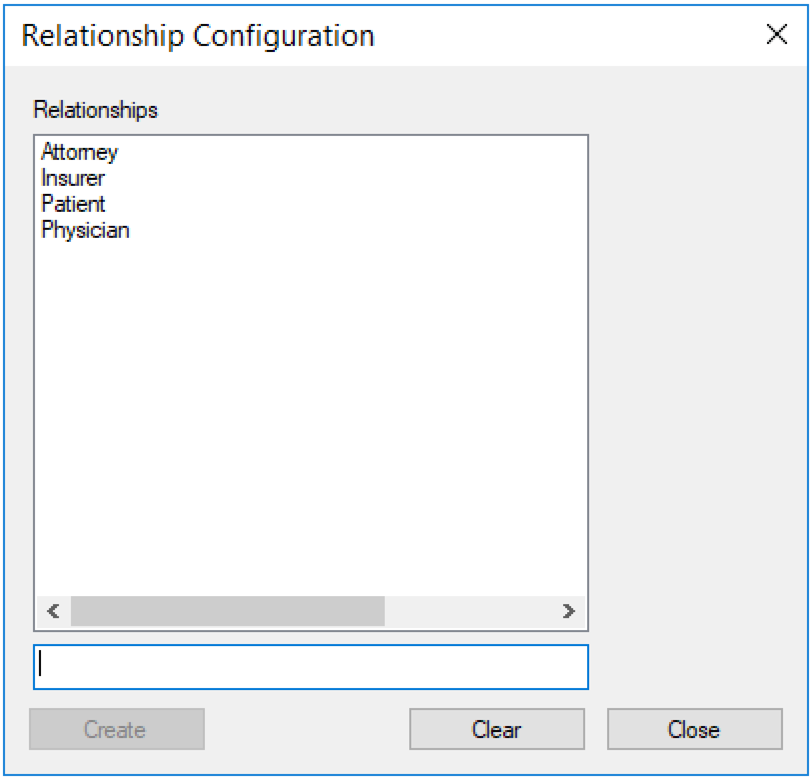
4. Enter a name for the copied Request Type in the **New Request Type** field.
5. Click **Create**. The new Request Type is added to the Request Type list.

Creating a Relationship

When creating an ROI request, the user must specify the requester's relationship to the patient.

To create a relationship the user can select:

1. In the Configuration module, select **Medical | Release of Information | Relationships**. The **Relationship Configuration** dialog box is displayed.



2. Type a name for the relationship and click **Create**.
3. Repeat as necessary.
4. Click **Close** when you have completed creating relationships.

Configuring Pricing Policies

A pricing policy is a set of rules used to determine what to charge a requester for the release of the pages in a request. Each rule in a pricing policy can be applied to a specific page range of a request, or one rule can simply be a flat fee for the entire request.

Rules are classified as either **Flat Fee** or **Per Page**. When using **Flat Fee**, the designated price is applied once to the entire page range. When using **Per Page**, the designated price is applied to each page in the page range.

A **Flat Fee** rule has a quantity of one when viewing invoice details of a request. A **Per Page** rule has a quantity of however many pages it is applied to.

To configure pricing policies, see the following sections:

- Creating a Pricing Policy on page 118
- Assigning a Pricing Policy to Facilities on page 123

Creating a Pricing Policy

A pricing policy determines how requests are priced based on facility requirements. Each facility can have its own set of pricing policies.

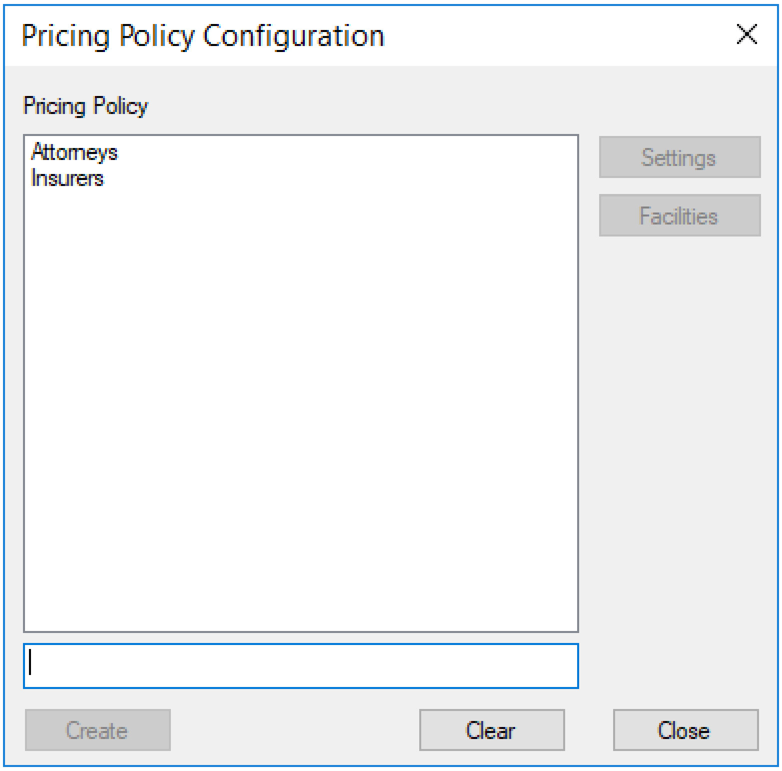
Each pricing policy can include several rules. For example, a pricing policy for insurance-related requests may include the following:

- A clerical fee of $20
- $1.25 per page for pages 1-10
- $0.65 per page for pages 11-50
- $0.25 per page for pages 51+

Notes on documents may contribute to the overall page count of a request packet. If a document contains notes, the notes are printed on a separate page following the document. Notes are not printed if they belong to a Note Type that uses the **Never Print on Document** setting.

To create pricing policy:

1. In the Configuration module, select **Medical | Release of Information | Pricing Policy**. The **Pricing Policy Configuration** dialog box is displayed.

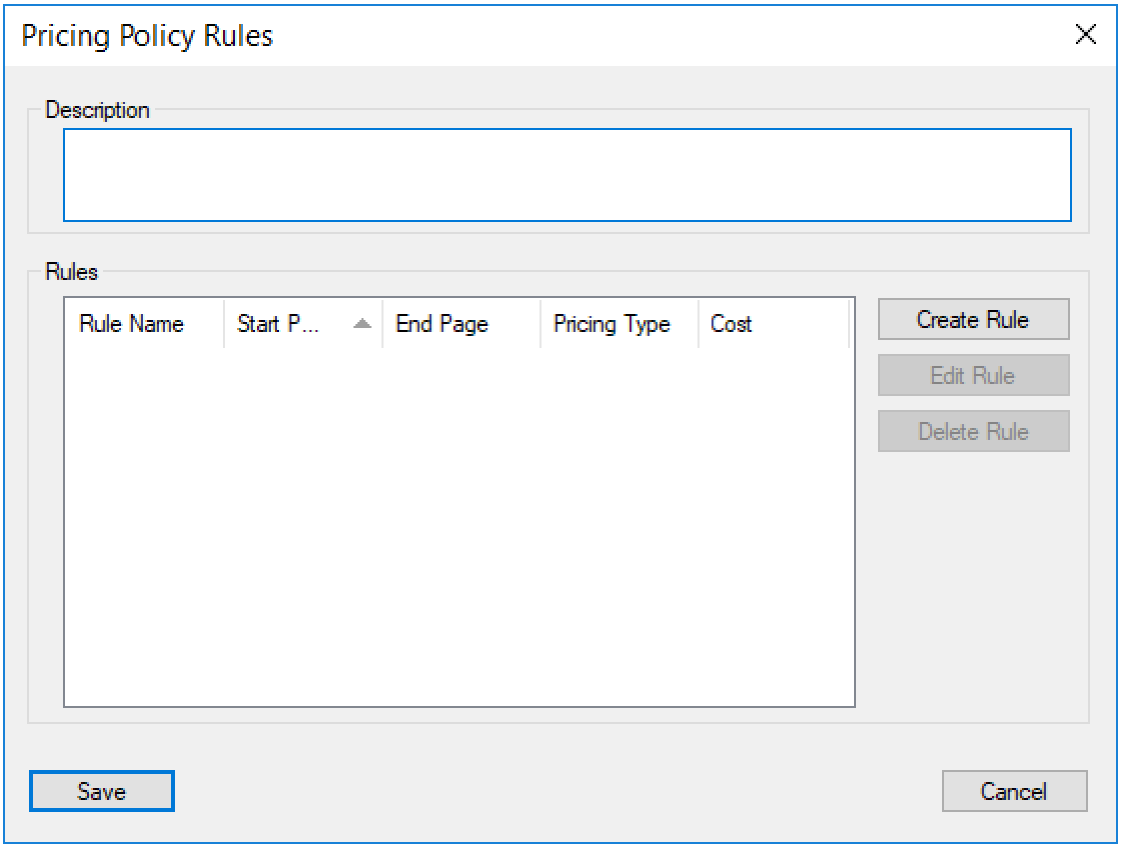


2. Enter a name for the pricing policy.

   For example, if the pricing policy should always be applied to a specific Request Type, assign it the same name as the Request Type.

Note: After a pricing policy is created, it cannot be deleted.

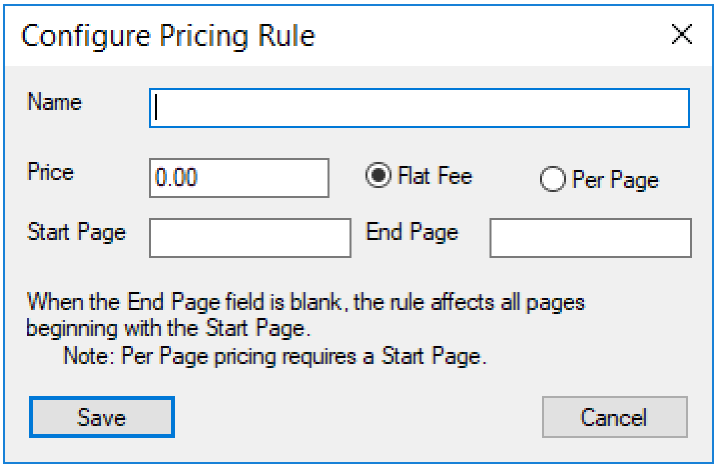
3. Click **Create**. The **Pricing Policy Rules** dialog box is displayed.



4. Enter a **Description** for the pricing policy.

   The description may provide general notes about the rules in the pricing policy, the facilities the policy should be applied to, and the Request Types using the policy.

5. Click the **Create Rule** button. The **Configure Pricing Rule** dialog box is displayed.



6. Enter a **Name** for the rule.

   Rule names are displayed in the invoice for the request, so their names should be simple and intuitive. For example, if you have multiple rules within a policy, consider naming them according to their page ranges (Release Pages 1-50, Release Pages 51-100, etc.).

7. Enter the criteria for the rule. The following table describes how to set up a rule to achieve a specific result.

Result	Setup
No Fee	No fee is charged for the request. • Select **Flat Fee**. • Leave the **Price**, **Start Page**, and **End Page** fields blank.
Flat Fee for Each Request	The price is applied as a single charge for each request. Additional rules can be created to add a per-page cost. • Select **Flat Fee**. • Enter the flat fee in the **Price** field. Leave the **Start Page** and **End Page** fields blank.
Flat Fee for a Page Range	The price is applied as a single charge for the specified page range. • Select **Flat Fee**. • Enter the fee in the **Price** field. • Enter the first page in the page range in the **Start Page** field. • Enter the last page in the page range in the **End Page** field.
Per-Page Cost for a Page Range	The price is charged for each page in the specified page range. • Select **Per Page**. • Enter the per-page cost in the **Price** field. • Enter the first page in the page range in the **Start Page** field. • Enter the last page in the page range in the **End Page** field. Leave the **End Page** field blank if the per-page cost should be applied to all pages following the **Start Page**.

Note: Page ranges cannot overlap within a pricing policy. For example, if Rule 1 is applied from pages 1 to 50, Rule 2 must start at page 51.

8. Click **Save**.
9. Create additional rules as needed.

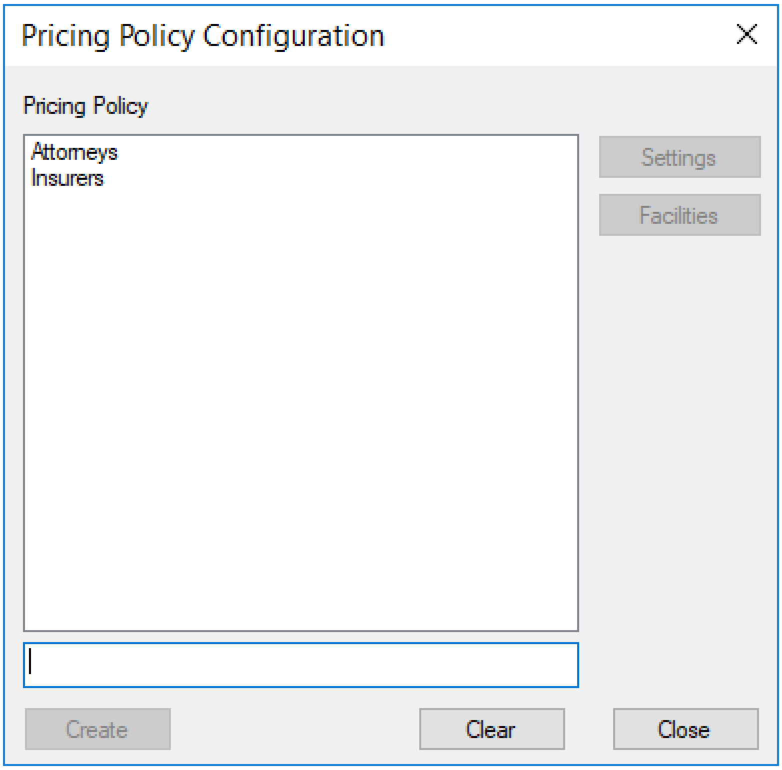
   To edit an existing rule, from the **Pricing Policy Rules** dialog box, select the rule from the **Rules** list and click the **Edit** button.

   To delete a rule, from the **Pricing Policy Rules** dialog box, select the rule from the **Rules** list and click the **Delete** button.
10. When you have successfully created the rules for the pricing policy, from the **Pricing Policy Rules** dialog box, click **Save**.

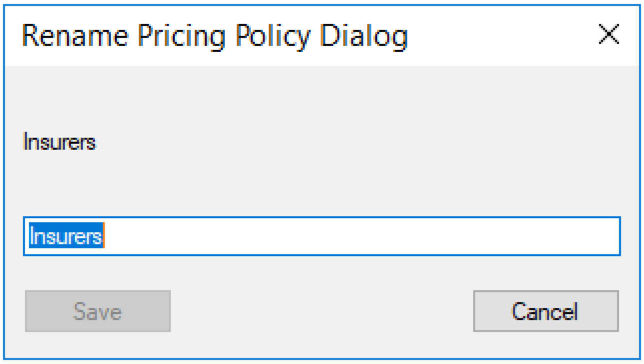
Renaming a Pricing Policy

To rename an existing pricing policy:

1. In the Configuration module, select **Medical | Release of Information | Pricing Policy**. The **Pricing Policy Configuration** dialog box is displayed.



2. Double-click the appropriate pricing policy from the **Pricing Policy** list. The **Rename Pricing Policy Dialog** dialog box is displayed.



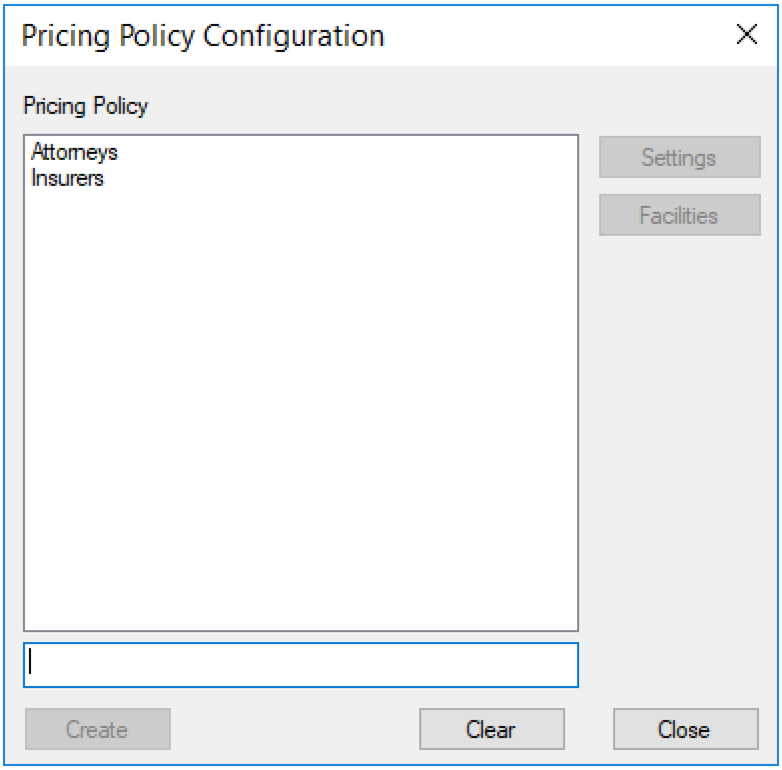
3. Enter a new unique name for the pricing policy.
4. Click **Save**. The pricing policy is renamed.

Assigning a Pricing Policy to Facilities

After pricing policies are created, they need to be assigned to facilities in order for them to be available to use.

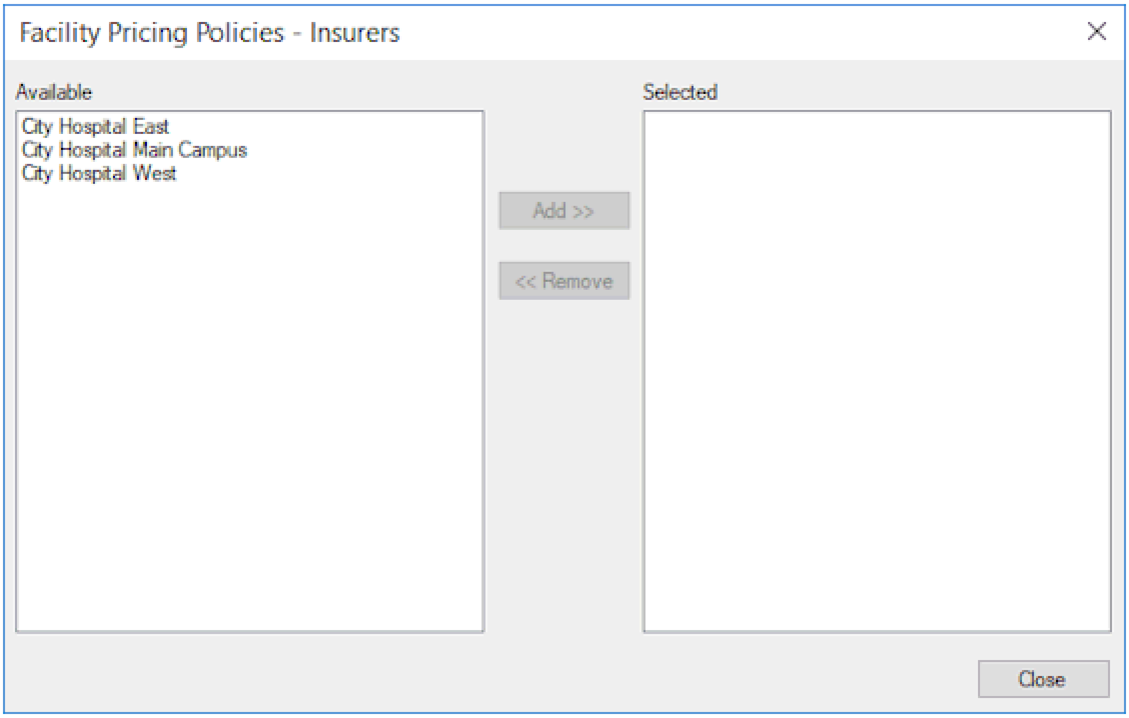
To assign a pricing policy to one or more facilities:

1. In the Configuration module, select **Medical | Release of Information | Pricing Policy**. The **Pricing Policy Configuration** dialog box is displayed.



2. Select the appropriate pricing policy.

3. Click the **Facilities** button. The **Facility Pricing Policies** dialog box is displayed.



4. To make the policy available for a facility, select the facility in the **Available** list and click **Add**.

   To remove the policy from a facility, select the facility in the **Selected** list and click **Remove**.
5. Click **Close** to save your changes.

Configuring Display Columns

You can customize which display columns are available to ROI users in certain contexts. Display columns are categories that display information from listed medical records charts or requests. Users can then organize these lists using the display columns.

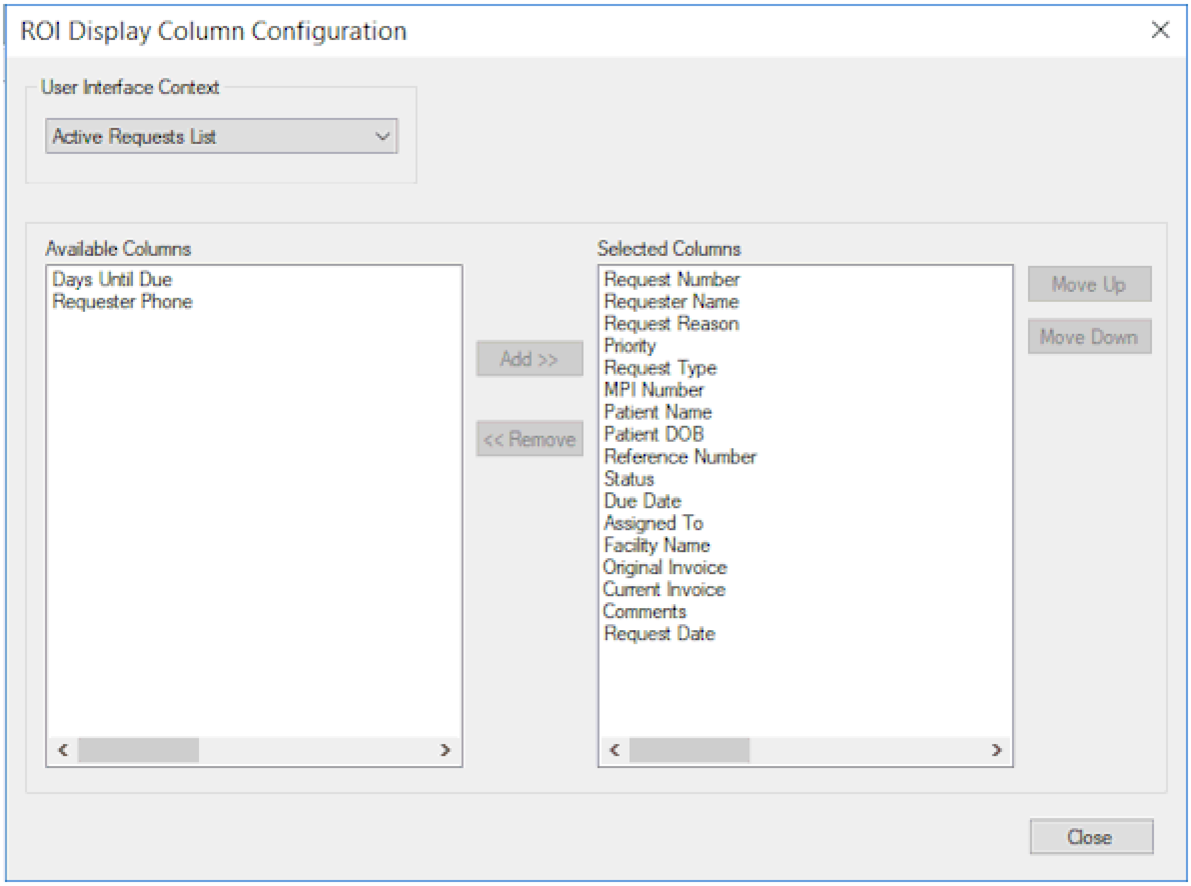
For column descriptions, see ROI Columns and Search Fields on page 510.

To configure display columns for **Select Charts** screen of the Add Attachments wizard:

1. From the Configuration module, select **Medical | Release of Information | Display Columns**.

Note: The **Display Columns** menu option is not available if you do not have an HL7 Listener license.

The **ROI Display Column Configuration** dialog box is displayed.



2. From the **User Interface Context** drop-down list, select the Release of Information interface context to configure:

Context	Description
Active Requests List	Allows you to configure which columns are displayed in the **Active Requests** list.

Context	Description
Add Attachments - Chart List	Allows you to configure which columns are displayed in the **Select Charts** dialog box of the **Add Attachments** wizard. **Note:** The Add Attachments wizard is not available if you do not have an HL7 Listener license.
Search Requests List	Allows you to configure which columns are displayed in the **Requests** list of the **Request Search** context.

3. To add one or more display columns to the selected context, select the appropriate column names from the **Available Columns** list and click **Add**.

   To remove one or more display columns from the selected context, select the appropriate column names from the **Selected Columns** list and click **Remove**.
4. The order of the columns in the **Selected Columns** list determines the order in which columns are displayed to the user.

   To move a column to the left, select it in the **Selected Columns** list and click the **Move Up** button until the it is at the desired order.

   To move a column to the right, select it in the **Selected Columns** list and click the **Move Down** button until it is at the desired order.
5. Click **Close** to save your changes.

Configuring Packet Templates

Before a request is released, all of the request attachments and system-generated documents (cover sheet, invoice, and inventory pages) are compiled into a packet. A packet is the request fulfillment, or deliverable, sent to the requester. A packet is generated into a PDF document, which can then be printed or saved to file.

For users to be able to generate packets, you must configure a packet template for each ROI facility. See the following sections for information on configuring a packet template.

- Packet Template Pre-Configuration on page 127
- Creating a Text Overlay on page 127
- Creating a Packet Template on page 130
- Configuring ROI Facility Settings on page 145

Packet Template Pre-Configuration

Before creating a packet template, ensure you have properly configured the following items:

- A request ID Keyword Type - This is the Keyword Type used to store the unique, system-generated request ID.
- An archival Document Type - This is the Document Type where the request packet PDF is stored after it is generated.

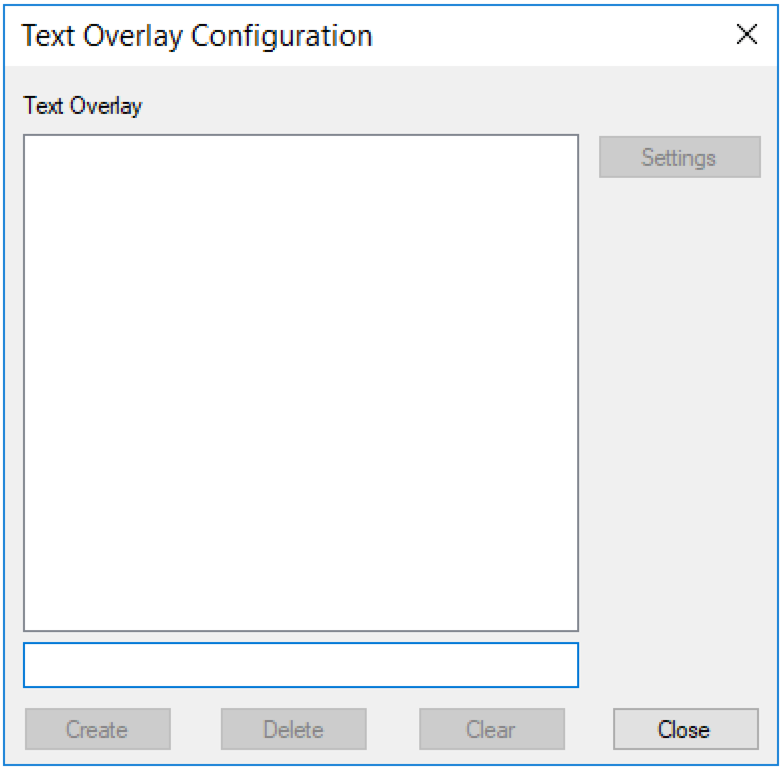
Note: For more information on configuring Keyword Types and Document Types, see the **System Administration** module reference guide or help file.

Creating a Text Overlay

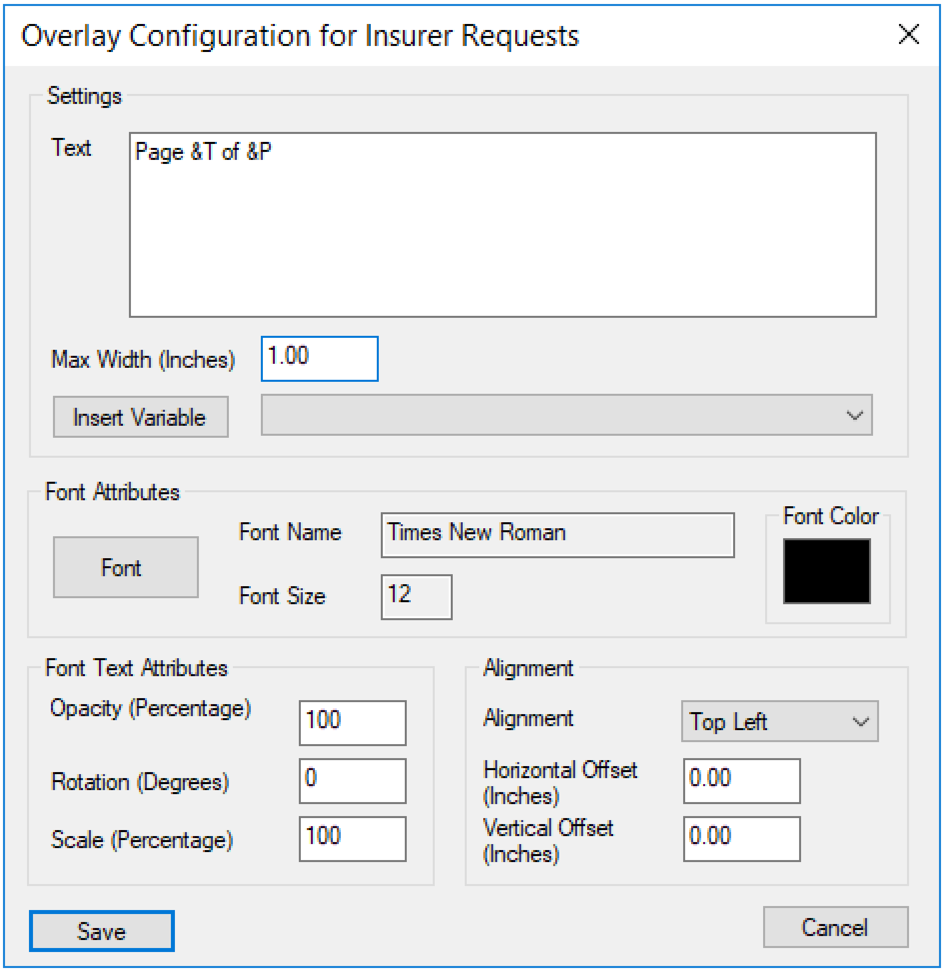
When a packet is generated, users can select a text overlay to apply to the packet. A text overlay can contain both static and dynamic text that is applied to all pages of the packet.

To create a text overlay:

1. From the Configuration module, select **Medical | Release of Information | Text Overlay Settings**.
   The **Text Overlay Configuration** dialog box is displayed.



2. Enter a name for the overlay and click **Create**.
   The **Overlay Configuration** dialog box is displayed.

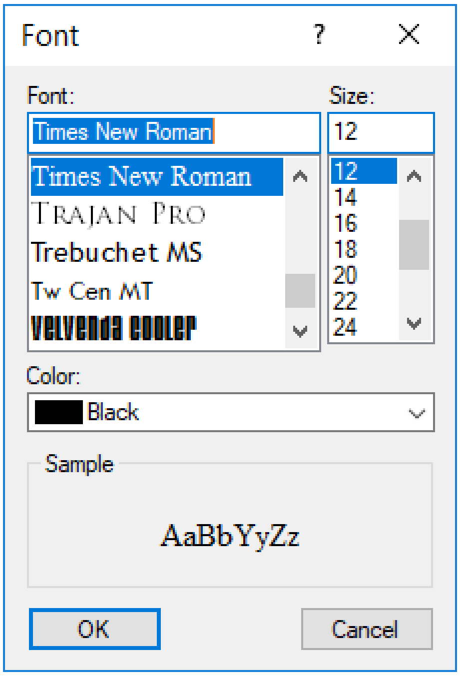


3. In the **Text** field, enter the desired text that should be displayed on each page of a packet using the overlay. Variable text is also available. When a packet is generated, all variables are dynamically replaced with data.
   To insert variable text, click the drop-down list and select the desired variable:
   - **Current page # of the entire packet** - Displays the current page number of the generated packet and is designated by the **&T** variable. The current page number is based on the total number of pages in the document and may differ from the document page number.
   - **Total number of pages of the entire packet** - Displays the total number of pages in the generated packet and is designated by the **&P** variable.

Note: The default text for a text overlay is **Page &T of &P**. For example, page 13 of a 100-page packet would read **Page 13 of 100**.

4. In the **Max Width (Inches)** field, type the maximum width of the text overlay in inches. **0** indicates an unlimited width.

5. To change the **Font Attributes**, click the **Font** button. The **Font** dialog box is displayed.



6. Specify the font, font size, and font color.

Note: The selected font must be available on the server where the ROI Packet Generation service is running.

7. Click **OK**. The **Font Attributes** section is updated to display the current settings.
8. In the **Font Text Attributes** section, specify the following:

Font Text Attribute	Description
Opacity (Percentage)	The opacity of the font text, as a percentage.
Rotation (Degrees)	The rotation of the font text, in degrees.
Scale (Percentage)	The scale of the font text, as a percentage.

9. From the **Alignment** drop-down list, select one of the following areas for the overlay's anchor point:

Alignment	Description
Top Left	The anchor point will be in the top left corner of the page.
Top Center	The anchor point will be centered at the top of the page.
Top Right	The anchor point will be in the top right corner of the page.

Alignment	Description
Center	The anchor point will be in the center of the page.
Bottom Left	The anchor point will be in the bottom left corner of the page.
Bottom Center	The anchor point will be centered at the bottom of the page.
Bottom Right	The anchor point will be in the bottom right corner of the page.

10. In the **Horizontal Offset (Inches)** field, specify how far from the horizontal axis of the default position that the overlay will appear.
11. In the **Vertical Offset (Inches)** field, specify how far from the vertical axis of the default position that the overlay will appear.
12. Click **Save** to save the text overlay.

Editing a Text Overlay

From the **Text Overlay Configuration** dialog box, text overlays can be edited or deleted as necessary.

To edit a text overlay, select the overlay from the **Text Overlay** list and click **Settings**. Reconfigure the overlay as necessary. For more information on overlay settings, see the previous section.

To delete a text overlay, select the overlay from the **Text Overlay** list and click **Delete**.

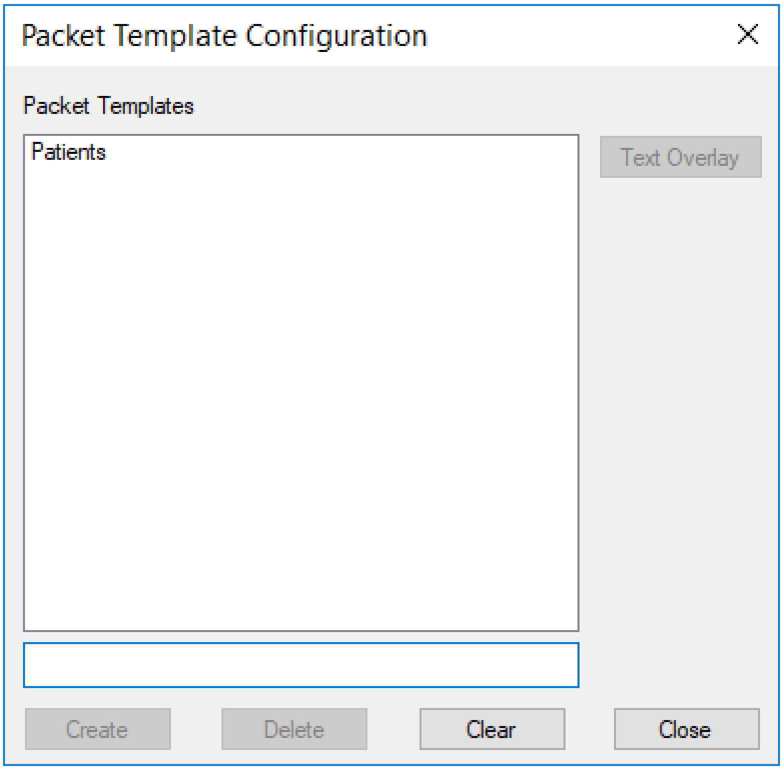
Creating a Packet Template

When a packet is generated, its pages are generated according to the specified packet template. A packet template specifies the text overlays available for users to choose from when they generate packets based on the template.

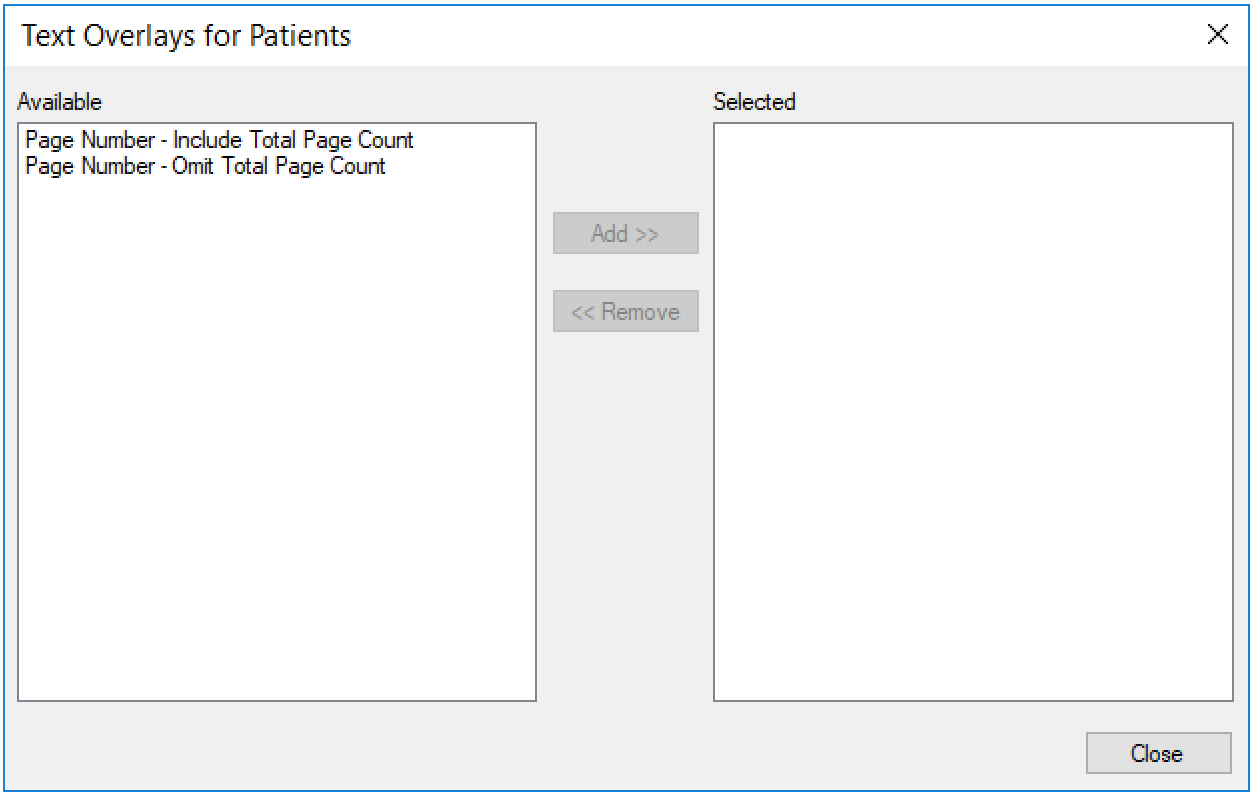
To create a packet template:

1. From the Configuration module, select **Medical | Release of Information | Packet Templates**.

   The **Packet Template Configuration** dialog box is displayed.



2. Enter a name for the template, and click **Create**. The **Text Overlays** dialog box is displayed.



3. Select the text overlays that apply to this template, and click **Add**.

   When you add text overlays to the packet template, the overlays become available for users to select when they generate packets with the template.

   To remove one or more text overlays from the template, select the overlay(s) from the **Selected** list and click **Remove**.
4. Click **Close**.

   Once packet templates are created, they can be assigned to specific facilities. For more information on selecting a default template for a facility, see Configuring ROI Facility Settings on page 145.

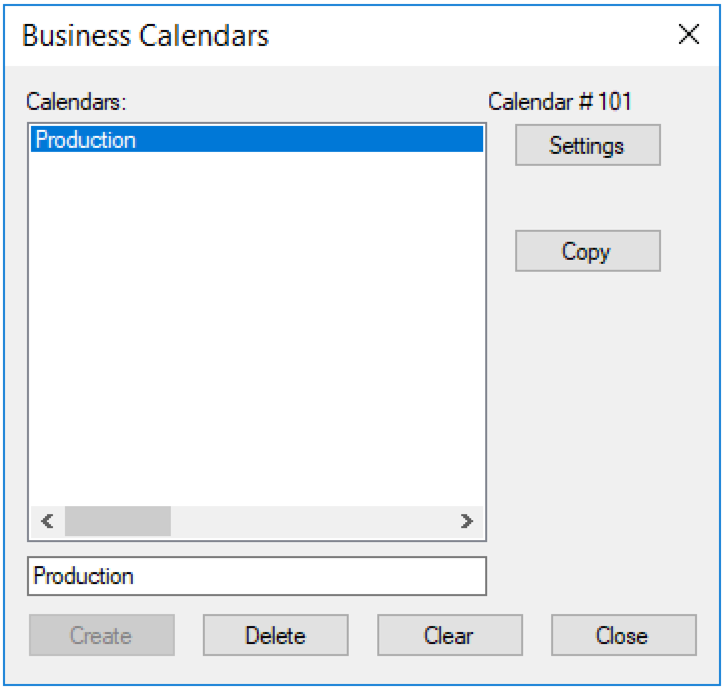
Creating a Business Calendar

Business Calendars are used to control which days are included when ROI reports calculate the total processing time for ROI requests. By default, the ROI Released Request and User Productivity reports include weekends and holidays in the total processing time. Business calendars let you exclude non-business days from request processing time.

Once you configure a Calendar, you can assign it to ROI in the next procedure, Configuring ROI System Settings on page 136. If no Calendar is assigned, OnBase will refer to the onbase32.ini file for days to exclude from processing time. See the Installation chapter for information about configuring INI settings.

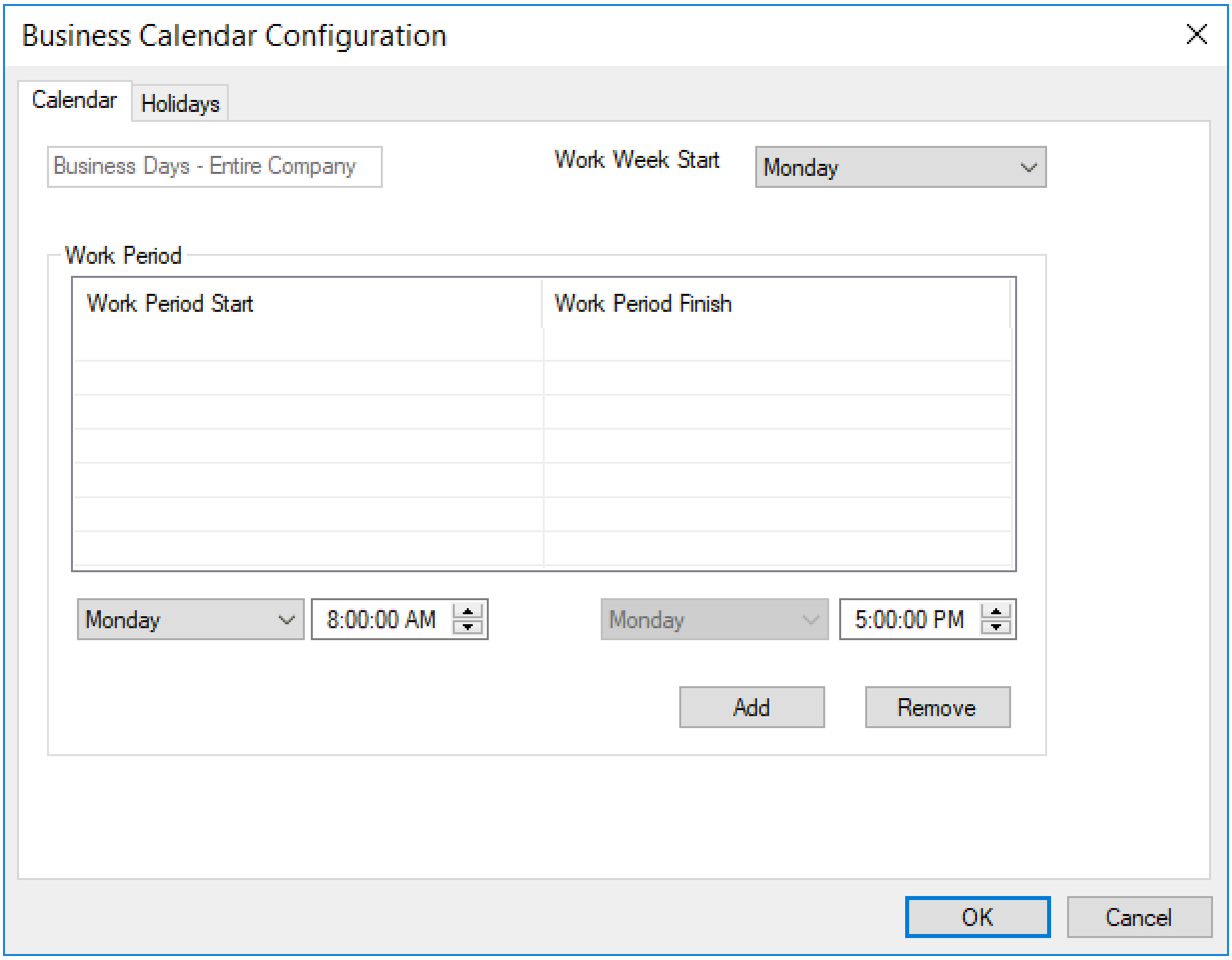
To create a business calendar:

1. In the Configuration module, select **Org Chart | Calendars**. The **Business Calendars** dialog box is displayed.



2. Type a name for the Calendar and click **Create**.

3. Click **Settings**. The **Business Calendar Configuration** dialog box is displayed with the **Calendar** tab selected. The **Calendar** tab lets you configure weekly hours of operation for your organization.

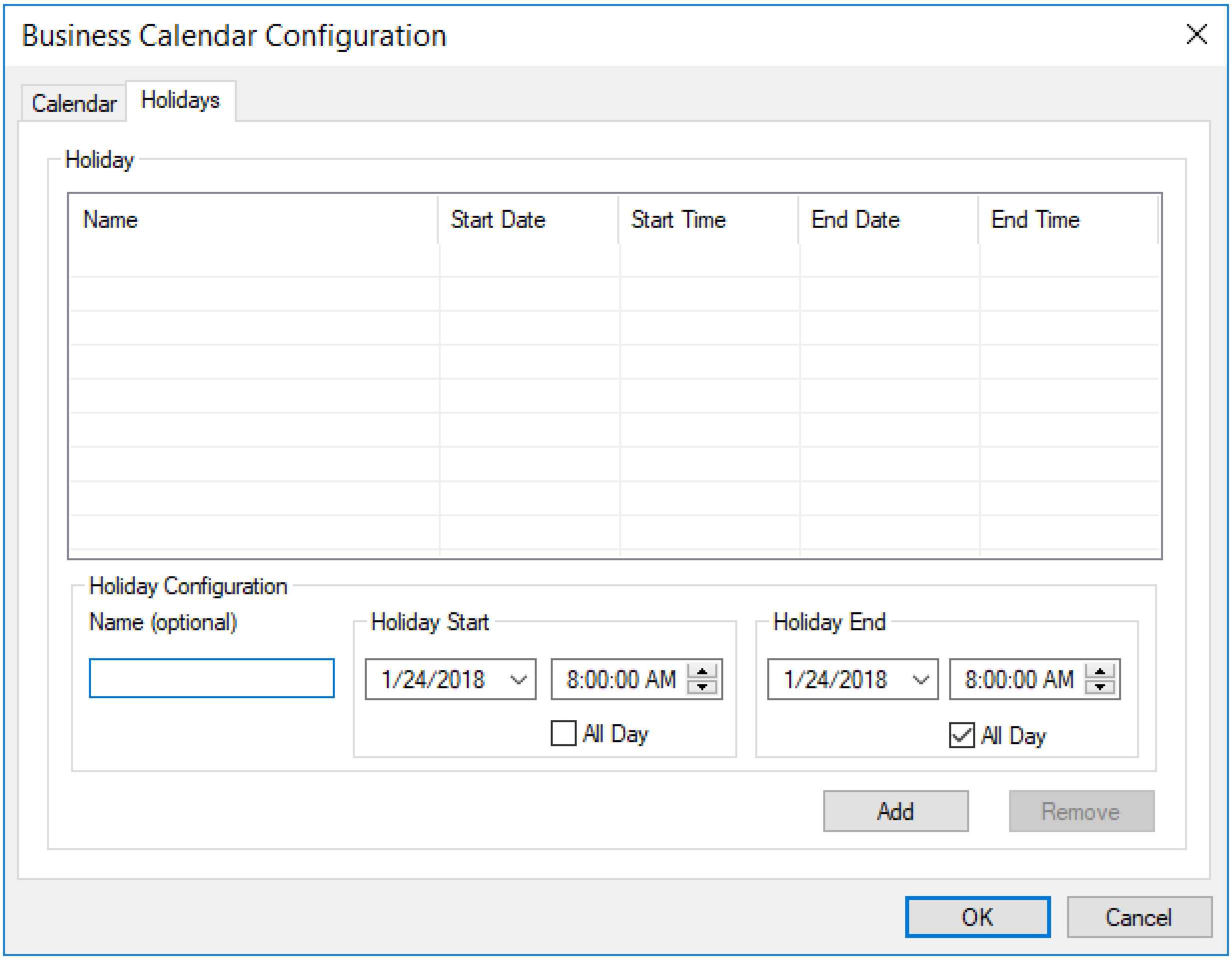


4. Select the first day of your business week from the **Work Week Start** drop-down list in the upper-right corner.
5. From the drop-down list under the **Work Period Start** column, select the first day of your business week.
6. In the adjacent time field, select or type the time when operating hours begin.
7. In the time field under the **Work Period Finish** column, select or type the time when operating hours end. By default, the work period ends on the same day it begins. If you are configuring a work period that extends into the next day, click the time field's up arrow button until the next day is displayed in the adjacent drop-down list.
8. Click **Add**.
9. Repeat steps 5 through 8 for each day of the business week. If you need to remove a work period, select it and click **Remove**.
10. Continue to the next topic.

Adding Holidays

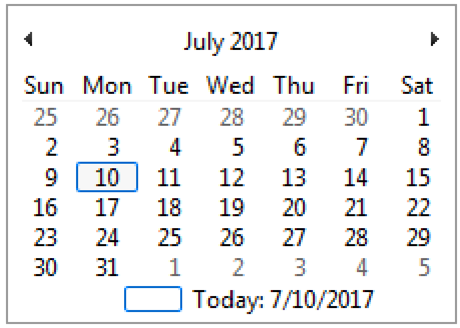
Release of Information reports will exclude any date configured as a holiday from request processing time. Even if the holiday period is configured for only a half day, the entire day will be excluded. If you assign the Calendar to a Workflow queue, half days are respected.

1. Access the **Business Calendar Configuration** dialog box. From OnBase Configuration, select **Org Chart | Calendars**.
2. Select a Calendar and click **Settings**.
3. Click the **Holidays** tab.



4. Optionally, type a name for the holiday you want to configure in the **Name** field under **Holiday Configuration**.

5. From the drop-down list under **Holiday Start**, select the start date of the holiday you want to add.



6. Select **All Day** if the holiday lasts all day.
7. If the holiday spans multiple days, select the last day of the holiday from the drop-down list under **Holiday End**.
8. Select **All Day** if the last day of the holiday lasts all day.
9. If the holiday lasts for only part of the day, select the appropriate start and end times from the time fields under **Holiday Start** and **Holiday End**. This period will be excluded from the normal working hours configured on the **Calendar** tab.
10. Click **Add** to add the holiday.
11. Repeat for each holiday you want to configure.
12. Click **OK** when you are finished.

Configuring ROI System Settings

Prior to configuring ROI system settings, ensure you have satisfied the requirements under Pre-Configuration on page 103. Then, proceed to the following topics:

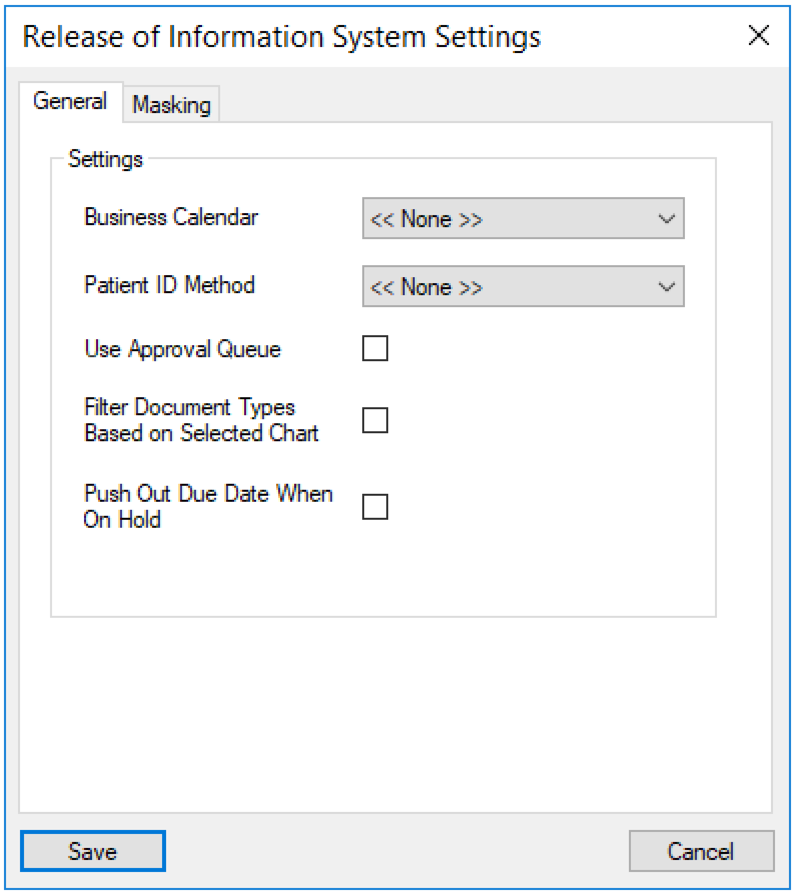
- General Settings on page 137
- Phone Number Masking Settings on page 139

General Settings

General settings are used to determine how all ROI requests in the system should be handled. Some of these settings can be overridden at the facility level.

To configure general settings for processing ROI requests:

1. In the Configuration module, select **Medical | Release of Information | System Settings**. The **Release of Information System Settings** dialog box is displayed.



2. From the **Business Calendar** drop-down list, select the Calendar you configured under Creating a Business Calendar on page 132.

3. From the **Patient ID Method** drop-down list, select the primary identifier for all request types. Available options are **MPI** (master patient index) or **MRN** (medical record number).
   - Select **MPI** if patients will be identified by the MPI record. An MPI record can be associated with one or more MRN records for the same patient.
   - Select **MRN** if patients will be identified by the MRN record. The relationship between MRN and MPI records must be one-to-one. Select this option only if your system does not use MPIs or if each MPI will be associated with only one MRN.

Note: The **Patient ID Method** drop-down list is not available if you do not have an HL7 Listener license.

4. Select **Use Approval Queue** if someone other than the ROI specialists working on the requests needs to approve requests before finalizing them.

   This setting can be overridden at the facility level. For more information, see Configuring ROI Facility Settings on page 145.
5. Select the **Filter Document Types Based on Selected Chart** option to filter available Document Types in the **Add Attachments** wizard based on the selected patients (MPIs or MRNs) and charts. When this option is selected, only those Document Types associated with the selected patients and charts are displayed. Clear this option to allow the user to choose from all medical record Document Types and Medical Record Custom Query Document Types, regardless of whether these Document Types contain documents relevant to the selected items.

Note: The **Filter Document Types Based on Selected Chart** option and the **Add Attachments** wizard are not available if you do not have an HL7 Listener license.

6. Select **Push Out Due Date When On Hold** if placing a request on hold should push out the due date for the request.

   When a hold is removed, the due date is recalculated to account for the number of days the request was on hold. For example, if a request is on hold for three days, then three days are added to the due date of the request when the hold is removed. If the request is for a facility that has the **Respect Business Calendar** setting selected, then only business days are used for the calculation.

   The **Push Out Due Date When On Hold** setting can be overridden at the facility level. For more information, see Configuring ROI Facility Settings on page 145.
7. If the **Disable Access to ROI in the OnBase Client** option is displayed in the **Release of Information System Settings** dialog box, see Disabling Access to Legacy Release of Information on page 93 for more information.

External Documents Settings

If OnBase is licensed for Report Capture for Meditech, the **External Documents** options are available in **General** tab of the **Release of Information System Settings** dialog box.

The following options apply to the ability to retrieve external documents using ROI in the Unity Client:

Option	Description
Include Documents from External Systems	Allows users who have **Fulfill** privileges to retrieve external system documents.
Delete External Documents After Releasing a Request	Permanently removes the external system documents retrieved for a request from the OnBase system after the request is released. **Note:** This option is only available when the Include Documents from External Systems option is selected.

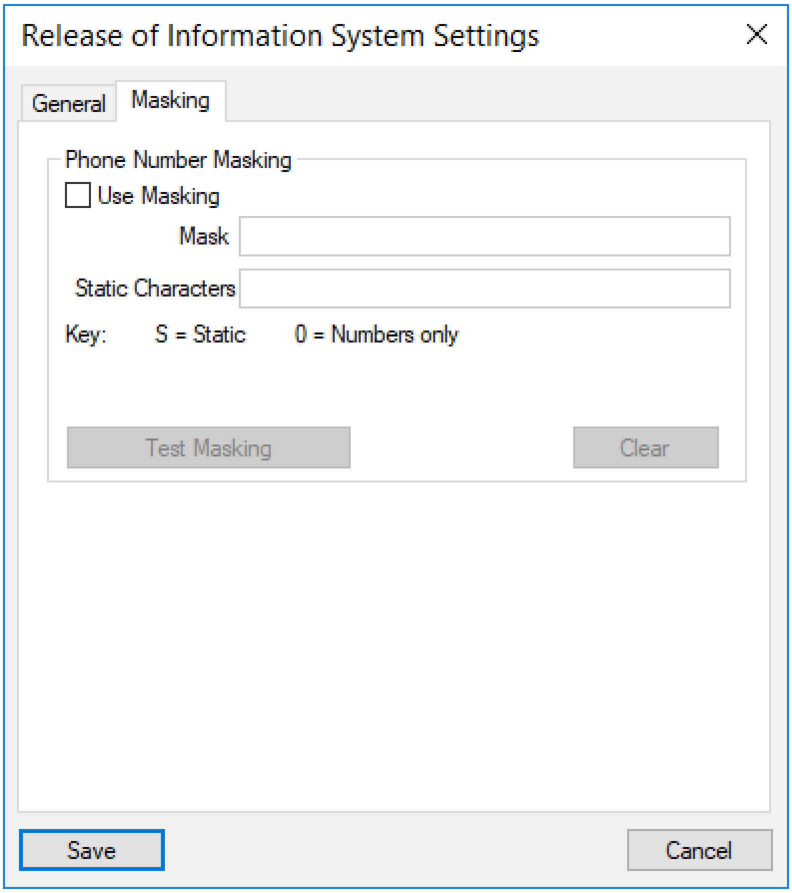
Phone Number Masking Settings

The **Masking** tab allows you to configure a default mask for phone and fax numbers entered within a request. This ensures phone and fax numbers are being entered in a uniform fashion on all requests.

Caution: Once you save a mask, it is applied to all existing and future phone and fax numbers in ROI. As a result, some existing numbers may not be displayed correctly.

To create a mask for phone and fax numbers:

1. Click the **Masking** tab in the **Release of Information System Settings** dialog box.

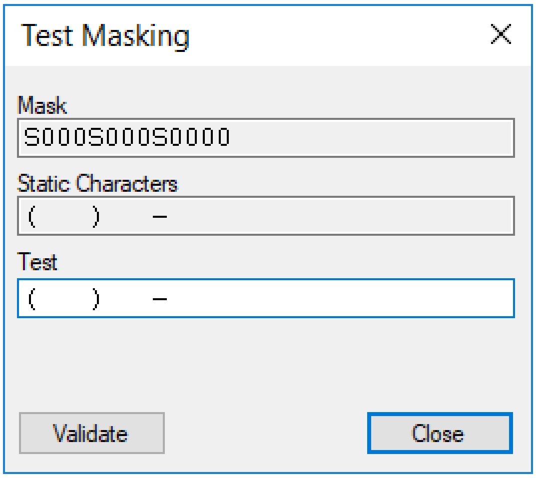


2. Select **Use Masking** to enforce the use of a mask when users enter phone and fax numbers on a request.

   When the **Use Masking** option is not selected, users are not restricted in how they enter numbers into phone and fax number fields.
3. Enter a mask into the **Mask** field.
   - Type **S** to designate each static character. Static characters cannot be changed by users.
   - Type **0** to designate each numeric character.

   For example, if you would like phone numbers to be entered and displayed in the format (216)555-1234, you would enter **S000S000S0000**.
4. In the **Static Characters** field, enter the static characters you would like to be displayed within phone and fax numbers in the order they should appear.

5. To ensure phone and fax numbers are displayed in ROI as intended, click the **Test Masking** button. The **Test Masking** dialog box is displayed.



6. In the **Test** field, enter a phone or fax number exactly as you would expect a user to enter it. If the test number is not displayed as you expected, reconfigure your mask accordingly.
7. Click **Close**.
8. Click **Save** from the **Release of Information System Settings** dialog box to save your changes.

Note: Values on existing requests may not appear correctly after the mask is configured.

Configuring ROI Templates

Note: Before configuring ROI templates, familiarize yourself with the content found in Configuring Templates on page 228.

The Release of Information module allows you to create standard templates for ROI cover sheets, bills, inventory pages, and rejection letters. These templates can then be populated using information from the request. Cover sheets and inventory pages are automatically released with the request. A bill is released with the request if one has already been generated. Rejection letters and bills can be printed upon executing certain actions on a request.

Creating Templates

The following steps provide a general outline for creating ROI templates for cover sheets, inventory pages, invoices, and rejection letters. For detailed information about configuring templates, see Configuring Templates on page 228.

Note: If you are configuring a template for a rejection letter, also see Configuring Rejection Letter Templates on page 143 in addition to the process below.

To create a ROI cover sheet, inventory page, bill, or rejection letter template:

1. Launch Microsoft Word.
2. Navigate to the **Template Builder** tab.
3. Create a Template Group. A template group is a folder where the template should be placed. For example, you might have a template group called **ROI Cover Sheets**.

   You can also create a template group upon saving the template.
4. Create a template and name it appropriately (e.g., **Cover Sheet for Walker Hospital - East Campus**).
5. Add any default text or images that should appear in the template (i.e., information that needs to be displayed on each document, regardless of the request).
6. Create appropriate placeholders for the template. These placeholders can be reused in other templates.

Note: Only use **XML Path** placeholders, which are part of the **External Data Source** placeholder source.

   a. Name the placeholders appropriately. For example, if you are creating a placeholder for the requester name, name the placeholder something like **Requester Name**.
   b. Enter the corresponding XPath using the XML schema in XML Schema for Template Creation - Standard Mode on page 209.

      Placeholders pull information from the request and insert unique values of the request into the document. For example, if you need to include the requester name, you would enter **//ROIRequest/Requester/Name** when prompted to enter the XPath.
   c. To create a placeholder that lists documents included in a packet, select to insert the results as either a list or a table. All other placeholders should be configured to insert the first value returned by the XPath query.

Note: When you insert a placeholder formatted as a table, adjust the number of columns as needed. By default, the placeholder will be inserted with five columns. If the template needs to display more columns, increase the number of columns as needed.

7. Insert the placeholders into the document where needed.
8. Save the template once you have finished work on it.

Tip: To avoid confusion when assigning templates, you should devise a naming convention for templates going forward if you anticipate having a large number of templates in your system.

9. Configure template options appropriately.

Note: For more information on these options, see Configuring Template Options on page 246.

As a best practice for ROI purposes, in addition to other template options you configure, you should configure the following template options accordingly:

- Select the desired Document Type from the **Document Type for Composed Documents** drop-down list. This is the Document Type where documents generated with this template are saved. If you do not select a Document Type, it is incumbent on the user to select the appropriate Document Type for generated documents upon executing certain ROI actions.
- Select the **Inherit Keywords from source document when possible** option. If you do not select this option, it is incumbent on the user to enter the appropriate Keyword Values for generated documents upon executing certain ROI actions.
- Select the **Disable the Import Dialog** option. To enable this option, you must first select a Document Type from the **Document Type for Composed Documents** drop-down list and select the **Inherit Keywords from source document when possible** option. By selecting the **Disable the Import Dialog** option, the user can perform ROI actions without also having to manually upload documents generated by those actions.
- If you select the **Always show Preview before archiving** option, you should also select the **Manually Edit the Document Preview** security option for User Groups assigned to the template. This allows users to make any necessary changes before printing.

Note: Recycle the application pool after selecting or deselecting the **Always show Preview before archiving** option and saving the template. This step resolves potential issues that can arise when attempting to print a document generated using the template.

When the **Always show Preview before archiving** option is selected, the user is forced to print a configured rejection letter to successfully reject the request.

10. Save the template.

    The template can now be assigned to a facility within the Configuration module. For more information on assigning templates to a facility, see Specifying Templates for a Facility on page 150.

Configuring Rejection Letter Templates

Rejection letter templates require the same setup as other ROI templates, as well as a few extra steps. The process below outlines the minimum requirements for a functioning rejection letter template and assumes you have already set up a template group and created a rejection letter template.

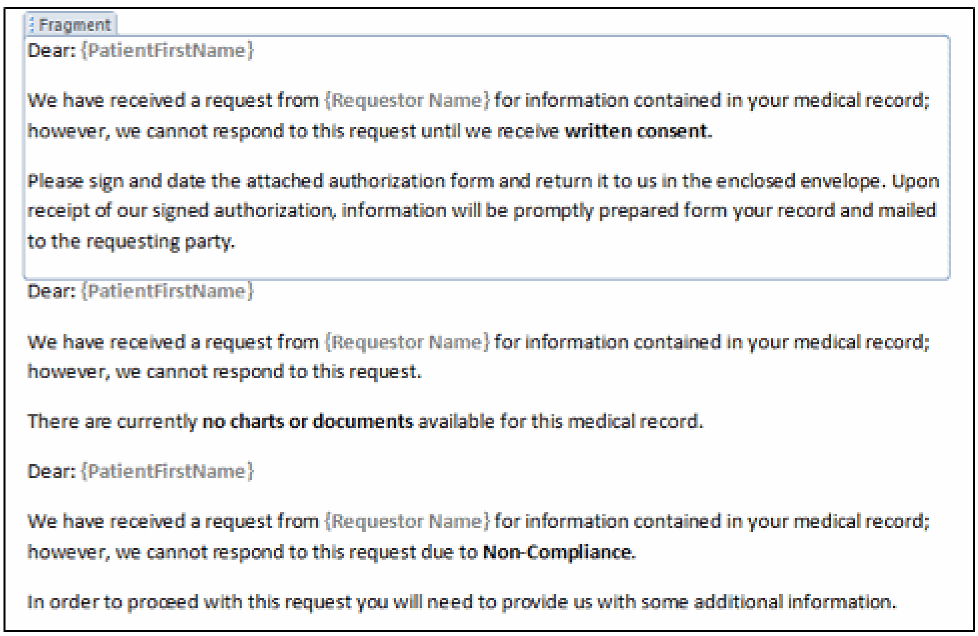
Note: For more information on creating template groups, templates, and placeholders, see the previous section, as well as the content found in Configuring Templates on page 228.

To configure a rejection letter template:

1. From Microsoft Word, open the appropriate template.
2. Create a document fragment for each Rejection Reason.

   For rejection-letter purposes, a fragment is the body of the letter for the specific Rejection Reason. It can contain placeholders, such as the patient's name and the requester name. The image below contains three fragments and illustrates how fragments might be displayed in the template.

Note: For more information on creating fragments, see Fragments on page 291.


Fragment

Dear: {PatientFirstName}

We have received a request from {Requestor Name} for information contained in your medical record; however, we cannot respond to this request until we receive **written consent**.

Please sign and date the attached authorization form and return it to us in the enclosed envelope. Upon receipt of our signed authorization, information will be promptly prepared form your record and mailed to the requesting party.

Dear: {PatientFirstName}

We have received a request from {Requestor Name} for information contained in your medical record; however, we cannot respond to this request.

There are currently **no charts or documents** available for this medical record.

Dear: {PatientFirstName}

We have received a request from {Requestor Name} for information contained in your medical record; however, we cannot respond to this request due to **Non-Compliance**.

In order to proceed with this request you will need to provide us with some additional information.

3. Create a Rejection Reason placeholder using the following XPath: **//ROIRequest/RejectReasonName**. This action encompasses all rejection reasons and only needs to be performed one time.
4. Insert the Rejection Reason placeholder into the main template (i.e., outside of the fragments).
5. Create equal-to conditions for the Rejection Reason placeholder.

   Each Rejection Reason should have a condition that inserts the corresponding Rejection Reason fragment. For example, if you configure a condition for the **Non-Compliance** Rejection Reason, the **Non-Compliance** fragment should be configured to be inserted into the rejection letter when the Rejection Reason placeholder is equal to **Non-Compliance**.

Note: For more information on configuring equal-to conditions, see Configuring Conditions on page 285.

Configuring User Group Rights for Composing Documents

To print composed documents, users must have the **Create** and **Print** privilege for the Document Types assigned to the following templates:

- Invoice Template
- Rejection Letter Template
- Ad Hoc Templates

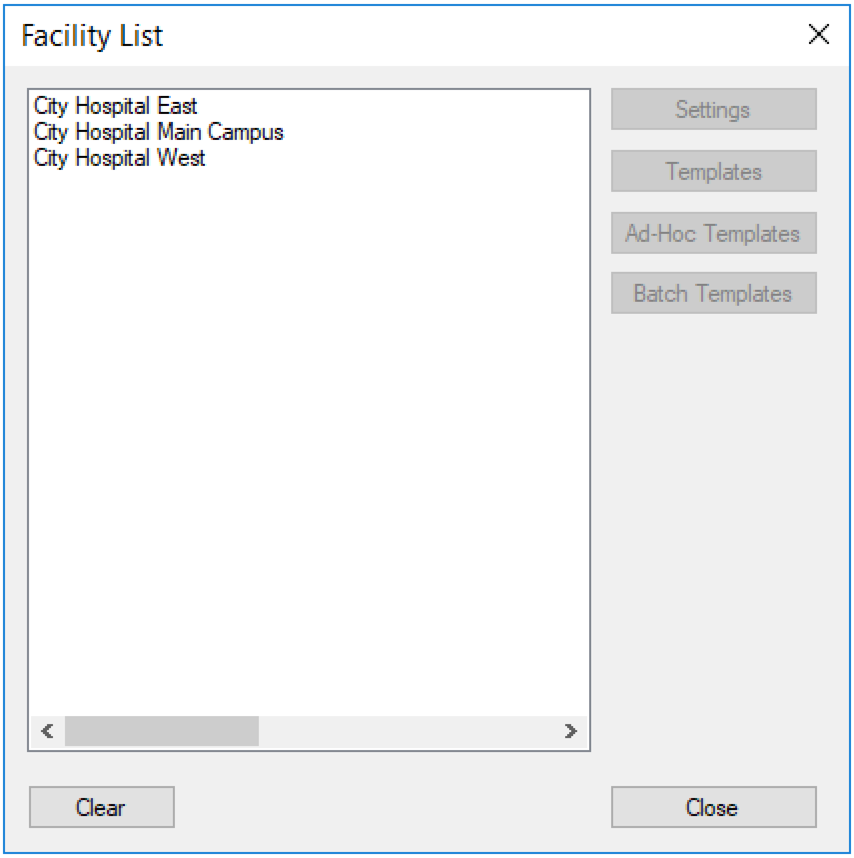
For information about ad hoc templates, see Assigning Ad Hoc Templates to a Facility on page 151.

Configuring ROI Facility Settings

You are able to configure certain facility-level settings that affect how an ROI request is processed.

To configure facility settings:

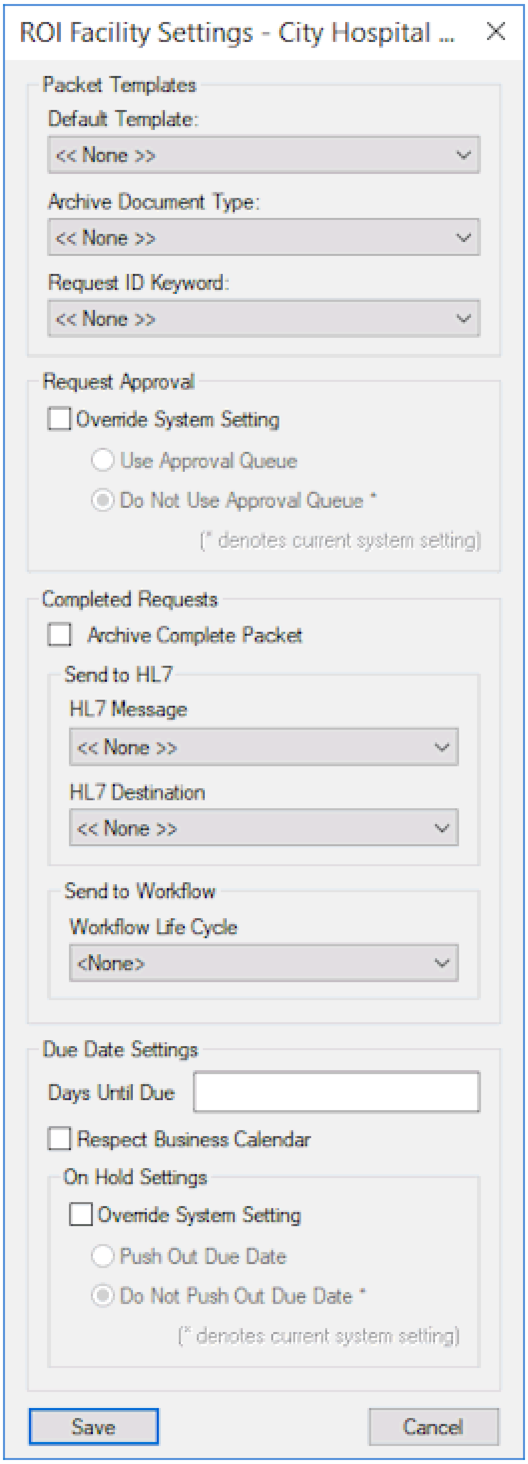
1. Click **Medical | Release of Information | Facility Settings**. The **Facility List** dialog box is displayed.



2. Select a medical facility from the list.

Note: Medical facilities are not created in this context. For more information on creating medical facilities, see the **Medical Records Unity Client** module reference guide.

3. Click **Settings**. The **ROI Facility Settings** dialog box is displayed.



4. Under **Packet Templates**, select from the following settings to determine the default template and the request archival settings:

Packet Templates Option	Description
Default Template	The template used to generate the PDF packets for this facility.
Archive Document Type	The Document Type used to store the generated PDF packets for this facility.
Request ID Keyword	The Keyword Type used to archive the unique, system-generated request number of requests associated with this facility.

5. In the **Request Approval** section, select from the following settings to determine whether this facility should respect the **Use Approval Queue** ROI system setting.

Request Approval Option	Description
Override System Setting	Select this option if the facility should override the **Use Approval Queue** system setting. An asterisk (*) denotes the current system setting, which is applied to all facilities without the **Override System Setting** option selected. For more information, see Configuring ROI System Settings on page 136.
Use Approval Queue	When selected, this option allows the selected facility to use the approval queue.
Do Not Use Approval Queue	When selected, this option does not allow the selected facility to use the approval queue.

6. In the **Completed Requests** section, select from the following settings to determine what actions should take place when a request is completed.

Completed Requests Option	Description
Archive Complete Packet	Select if OnBase should archive the whole request packet, including all attached documents and any system-generated documents that should be released with the request, as a single document. If this setting is not selected, only the packet containing attached documents is archived into OnBase. System-generated documents may include a cover sheet and inventory pages. Regardless of whether **Archive Complete Packet** is selected, these documents are included with the packet when the user selects to print the request or save it to file.

Completed Requests Option	Description
HL7 Message	Select an HL7 message template to generate an HL7 message upon completion of the request. **Note:** HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.
HL7 Destination	Select an HL7 export destination to determine where the completed request and HL7 message are delivered.
Workflow Life Cycle	Select a Workflow Life Cycle the archived request packet should enter. If a request results in the archival of multiple packets, all associated packets are sent to this Life Cycle.

7. In the **Due Date Settings** section, configure the following settings to define how request due dates are handled.

Due Date Setting	Description
Days Until Due	Enter the default number of days for requests at this facility to be completed. When a request is created, this number will be added to the request date to populate the **Request Due Date** field with a default value. ROI users can manually change the due date as needed, provided the request has a status of **Initiated**.
Respect Business Calendar	Select this option if ROI should skip non-business days and holidays when calculating request due dates. Do not select this option if ROI should include non-business days and holidays when calculating request due dates. Non-business days and holidays are defined by the business calendar selected under **Medical | Release of Information | System Settings**. For more information, see Configuring ROI System Settings on page 136.
Override System Setting	Select this option if the facility should override the **Push Out Due Date When On Hold** system setting. An asterisk (*) denotes the current system setting, which is applied to all facilities that do not have the **Override System Setting** option selected. For more information, see Configuring ROI System Settings on page 136.

Due Date Setting	Description
Push Out Due Date	Select this option if placing a request on hold should push out the due date for the request. When a hold is removed, the due date is recalculated to account for the number of days the request was on hold. For example, if a request is on hold for three days, then three days are added to the due date of the request when the hold is removed. If **Respect Business Calendar** is selected, then only business days are used for the calculation.
Do Not Push Out Due Date	Select this option if placing a request on hold should not push out the due date for the request. The **Request Due Date** remains static regardless of how long a request is on hold.

8. Click **Save**.

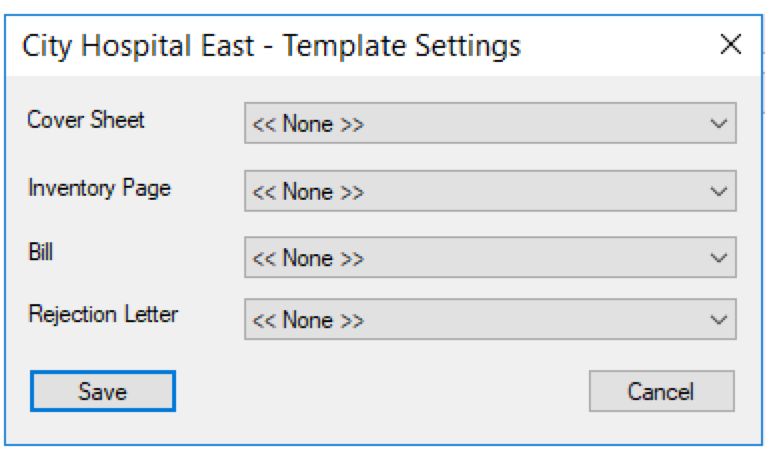
Specifying Templates for a Facility

For each facility used in ROI, you are able to specify a set of templates used in the ROI process. These templates can include a cover sheet, bill, inventory page, and rejection letter. When using ROI, the cover sheet, inventory pages, and bill are generated and released with the rest of the requested information; the bill and rejection letter can be generated and printed by marking the request as either billed or rejected, respectively.

Note: Before assigning templates to a facility, you must first create the appropriate templates using Document Composition in Microsoft Word. For more information on creating ROI templates, see Configuring ROI Templates on page 141.

To specify templates for a facility:

1. From the **Facility List** dialog box, select a facility.
2. Click the **Templates** button. The **Template Settings** dialog box is displayed.



3. Select the appropriate template for **Cover Sheet**, **Bill**, **Inventory Page**, and **Rejection Letter**. All system templates are available from each drop-down list.

4. Click **Save** to assign the selected templates to the facility.

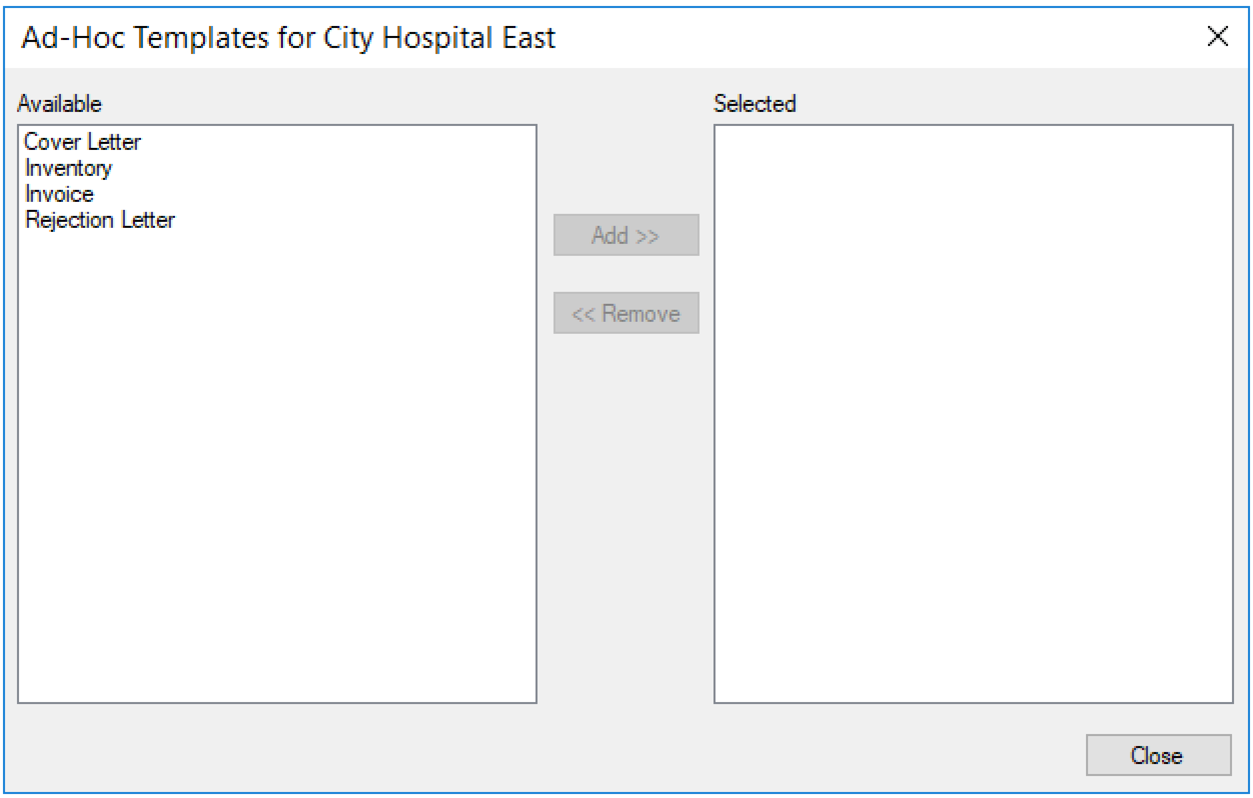
Assigning Ad Hoc Templates to a Facility

For each facility in ROI, you can assign ad hoc templates. Unlike templates specified for the ROI process, documents generated from ad hoc templates are not contingent on any executed action and are not included in request packets. They can be generated and printed from any request that is in progress.

Note: To print composed documents, users must have the **Create** and **Print** privilege for the Document Types assigned to the associated templates.

To assign available ad hoc templates to a facility:

1. From the **Facility List** dialog box, select a facility.
2. Click the **Ad-Hoc Templates** button. The **Ad-Hoc Templates** dialog box is displayed.



3. To assign templates to the facility, select them from the **Available** list and click **Add**. All system templates are available for selecting.

   To remove templates from the facility, select them from the **Selected** list and click **Remove**.
4. Click **Close** to save your changes.

Assigning Batch Templates to a Facility

Batch templates allow you to generate visit-level cover sheets and inventory pages for requests that contain multiple charts. Batch templates apply only to requests where the **Separate by Chart** option is enabled on the release order screen.

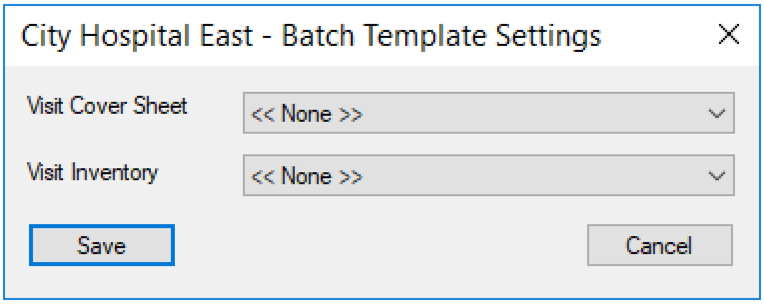
If **Separate by Chart** is enabled:

- Each visit (chart) will have its own packet with its own cover sheet and inventory page.
- If the request includes patient documents that are not attached to a chart, then each patient included in the request will have a separate packet for clinical patient documents. Each packet will have its own cover sheet and inventory page.
- If the request includes documents that are not attached to any patients or charts, then these documents are grouped together in a separate packet. This packet will have its own cover sheet and inventory page.

Note: Users who fulfill ROI requests must have the **Compose Documents from this Template** right for the configured batch templates. For information about template security settings, see Configuring Template Options on page 246.

To specify batch templates for a facility:

1. From the **Facility List** dialog box, select a facility.
2. Click **Batch Templates**. The **Batch Template Settings** dialog box is displayed.



3. Select the appropriate template for **Visit Cover Sheet** and **Visit Inventory**. All system templates are available from each drop-down list.
4. Click **Save**.

Running the Packet Generation Service

The ROI Packet Generation service is a Windows service that listens for and generates new request packets after users either finalize or approve requests. The service does not need to be running when a packet becomes ready for generation, but it must be running to in order generate the PDF packet so that the request can move forward.

Note: If you make a change in OnBase Configuration, the service will not respect the change until it is restarted.

Tip: It is considered a best practice to run the ROI Packet Generation service at all times. Packets are generated in the order they become ready for generation. Multiple instances of the ROI Packet Generation service can run concurrently, allowing the deployment to be scaled out as needed.

Verifying the Service Is Running

The ROI Packet Generation service runs on a server dedicated to packet generation.

To verify the service is running:

1. Open the Windows Services console (**services.msc**).
2. Locate the ROI Packet Generation service.
3. Verify the status is **Running**.

Monitoring the Service

To monitor for errors related to packet generation, use the Diagnostics Console. If a packet fails to generate due to an issue with the packet or your configuration, an error is logged to the **Errors** tab.

The Unity Management Console allows you to view the execution status and history of the ROI Packet Generation service.

To check the service execution status:

1. Open the Unity Management Console.
2. Connect to the task scheduler designated for packet generation.
3. Navigate to the task group created for packet generation.
4. Select the **Generate ROI Unity Packets** task from the tasks pane.
5. Expand the **Details** pane to view the task schedule, status, and history. The **History** tab is especially useful for viewing the number of packets generated each time the task is executed.

   For information about statuses and other values displayed in the **Details** pane, see the **Unity Scheduler** module reference guide.

Auditing ROI Requests

For administrative purposes, you can audit ROI request actions by creating a Transaction Log Report in the OnBase Client.

To audit requests, from the OnBase Client, do one of the following:

- To view all ROI actions, select **Admin | Transaction Logs | View All Messages | Release of Information Log**. You are prompted that running an unrestricted query may take a long time. Click **Yes** to continue.
- To only view certain ROI actions, select **Admin | Transaction Logs | Create Report**. From the **Transaction Log** drop-down list, select **Release of Information**.

Note: For more information on creating and viewing Transaction Log Reports, see the System Administration module reference guide.

The Transaction Log records the following actions for ROI requests:

- Viewing requests
- Adding documents to requests
- Removing documents from requests
- Creating requests
- Printing requests
- Creating, failing, and stopping batches (external document retrieval)
- Assigning, unassigning, and reassigning requests
- Submitting (finalizing), approving, and returning requests
- Receiving payment and printing invoices for requests
- Canceling and rejecting requests

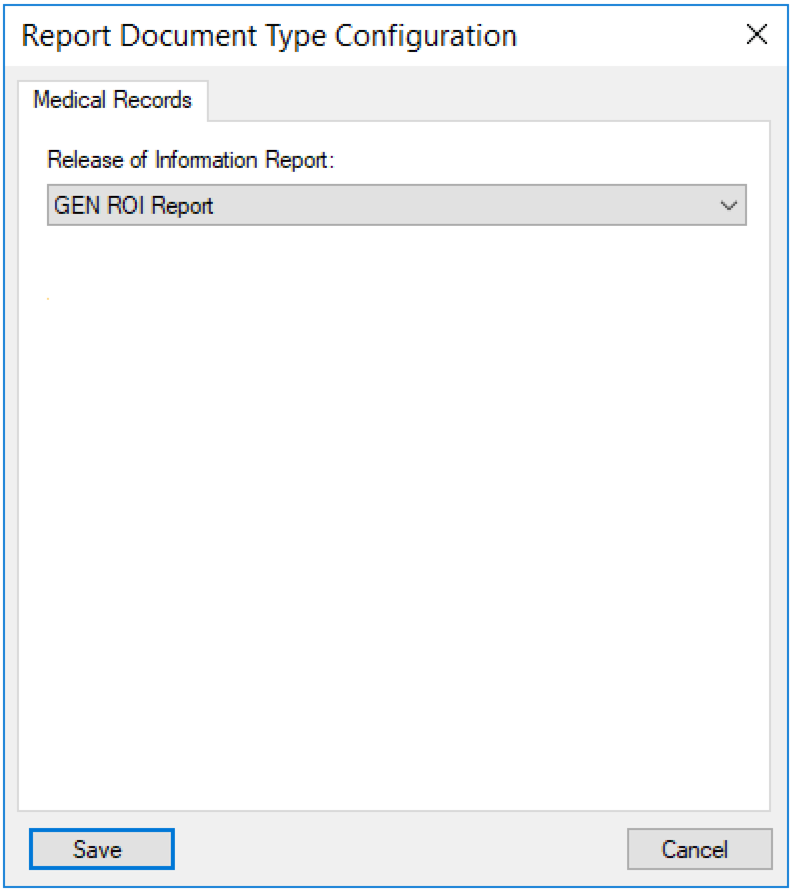
Configuring ROI Reports

Users with the **Productivity Reports** ROI privilege can run Release of Information reports from the OnBase Client. Before these reports can be generated, a Document Type must be designated for storing the reports.

To designate a Document Type for Release of Information reports:

1. Using the Configuration module, create a Document Type for Release of Information reports.
2. After creating the Document Type, select **Medical | Report Document Types**. The **Report Document Type Configuration** dialog box is displayed.

3. From the **Release of Information Report** drop-down list, select the Document Type you created for Release of Information reports.



4. Click **Save** when finished.

Note: By default, the User Productivity and Released Requests reports include weekends and holidays in the total processing time for each request. You can configure OnBase to exclude weekends and holidays using a Business Calendar. See Creating a Business Calendar on page 132.

Creating Workflow Authorization Forms

If OnBase is licensed for Workflow, you can configure authorization forms that trigger the creation of an ROI request when a form is created. See the following topics:

- Form Keyword Types on page 156
- ROI Workflow Action on page 158

Form Keyword Types

Authorization forms must be assigned the Keyword Types necessary for request creation. See the following topics:

- Required Keyword Types for Authorization Forms on page 156
- Optional Keyword Types for Authorization Forms on page 157

Required Keyword Types for Authorization Forms

Authorization forms must include Keyword Types for each of the following items:

Required Keyword Type	Purpose
Request ID	Links the authorization form to the ROI request. This field is automatically populated when the **Create Release of Information Request** Workflow action is executed on the document. ROI users can view the authorization form from the associated ROI request. **Note:** Configure the **Request ID** Keyword Type as read-only on the Document Type for the form. For more information on Keyword options, see the **System Administration** module reference guide or help file.
One of the following: • Facility ID # • Facility Name	Populates the **Facility** field in the **Request Information** section of the request form. This value is required to ensure the correct facility settings are applied to the request.

Required Keyword Type	Purpose
One of the following: • MPI • MRN • Chart ID #	Adds one or more patients to the request. These Keyword Types must be mapped to the corresponding Chart Data Fields in OnBase Configuration. • If the ROI **Patient ID Method** is set to MPI, the MPI is used to add the associated patient to the request. If OnBase is configured to use Assigning Authorities to uniquely identify MPIs, then an MPI Assigning Authority Keyword Value must also be provided. • Regardless of the **Patient ID Method**, the MRN can be used to add the associated patient to the request and to automatically select the associated record in the **Add Attachments** wizard. If OnBase is configured to use Assigning Authorities to uniquely identify MRNs, then an MRN Assigning Authority Keyword Value must also be provided. • The Chart ID # is used to add the associated patient and automatically select the associated chart in the **Add Attachments** wizard. If OnBase is configured to use Assigning Authorities to uniquely identify charts, then a chart Assigning Authority Keyword Value must also be provided. Even when a patient is added to the request, the ROI user still must use the **Add Attachments** wizard to add documents to the request.

Optional Keyword Types for Authorization Forms

Optionally, authorization forms can include Keyword Types for the following items:

Optional Keyword Type	Purpose
Reason for Request	Populates the **Reason for Request** field of the request form if mapped to the **Reason** setting on the Workflow action.
Request Due Date	Populates the **Request Due Date** field of the request form if mapped to the **Request Due Date** setting on the Workflow action.
Admit Date	Populates the **Date(s) of Service** filter in the **Add Attachments** wizard if mapped to the **From** setting on the Workflow action.
Discharge Date	Populates the **Date(s) of Service** filter in the **Add Attachments** wizard if mapped to the **To** setting on the Workflow action.
Requester Name	Populates the **Name** field in the **Requestor Information** section of the request form if mapped to the **Name** setting on the Workflow action.

Optional Keyword Type	Purpose
Requester Phone	Populates the **Phone** field in the **Requestor Information** section of the request form if mapped to the **Phone** setting on the Workflow action.
Requester Address Line 1	Populates the **Line 1** field in the **Shipping Address** section of the request form if mapped to the **Line 1** setting on the Workflow action.
Requester Address Line 2	Populates the **Line 2** field in the **Shipping Address** section of the request form if mapped to the **Line 2** setting on the Workflow action.
Requester City	Populates the **City** field in the **Shipping Address** section of the request form if mapped to the **City** setting on the Workflow action.
Requester State/Province	Populates the **State/Province** field in the **Shipping Address** section of the request form if mapped to the **State/Province** setting on the Workflow action.
Requester ZIP/Postal Code	Populates the **ZIP/Postal Code** field in the **Shipping Address** section of the request form if mapped to the **ZIP/Postal Code** setting on the Workflow action.
Requester Country	Populates the **Country** field in the **Shipping Address** section of the request form if mapped to the **Country** setting on the Workflow action.

ROI Workflow Action

After you configure an authorization form, you can map the associated Keyword Types to the corresponding fields of the **Create Release of Information Request** Workflow action. For more information, see Workflow on page 159.

System Interaction

Report Capture for Meditech

If your solution is licensed for Report Capture for Meditech, then OnBase Release of Information can be used to import and attach external system (e.g., Meditech) documents to be released in a request. For more information, see the section on ROI and Report Capture for Meditech in the Usage chapter.

Virtual Print Driver

If your solution is licensed for Virtual Print Driver, then OnBase Release of Information can attach documents printed and uploaded using the Virtual Print Driver to a request. For more information, see the section on ROI and the Virtual Print Driver in the Usage chapter.

Workflow

If your solution is licensed for Workflow, then the ROI request creation process can be automated by the **Create Release of Information Request** Workflow action. When a user creates an ROI authorization form, the document's Keyword Values are populated into a new request. To view a document that prompted the creation of a certain request, click the **Authorization Form** button from the **Release of Information** tab in any applicable request.

Note: The **Authorization Form** button is only available from requests created using the **Create Release of Information** action.

Create Release of Information Request Action

Creates an ROI request using Keyword Values from a newly created document. Map Keyword Types to the appropriate items so that the entered values are used in a request.

Note: This action is supported only in the Core-based OnBase Client, Web Client, and Unity interfaces.

Note: If you select a Keyword Type that does not exist on the Document Type, a warning is displayed within the associated Keyword Type drop-down list.

Request Information Tab

Keyword Types can be assigned to the following items in the **Request Information** tab:

- Request ID (required)
- Facility (one is required)
  - Facility ID
  - Facility Name
- Reason
- Request Due Date

Patient Information Tab

Keyword Types can be assigned to the following items to add patients or charts to the request. An ROI user still must use the **Add Attachments** wizard to add documents to the request.

- Patient ID
- Patient Name (These settings are available for incremental upgrade purposes only. They are not used with the current version of the Release of Information module.)
    - Full Name
    - Last Name
    - First Name
- Date of Birth (This setting is available for incremental upgrade purposes only. It is not used with the current version of the Release of Information module.)
- Date(s) of Service
    - From
    - To

Requester Information Tab

Note: If you are using Release of Information in Integrated Mode, items on this tab are not applicable.

Keyword Types can be assigned to the following items to populate the corresponding Requester Information and Shipping Address fields on the request form:

- Name
- Phone
- Shipping Address
    - Line 1
    - Line 2
    - City
    - State/Province
    - ZIP/Postal Code
    - Country

Configuring a New ROI System

Before configuring the Release of Information module in a newly licensed system, see the following sections:

- Specifying the ROI Mode on page 161
- Disabling Access to Legacy Release of Information on page 162

Specifying the ROI Mode

The first time you access Release of Information **System Settings** in OnBase Configuration, you are prompted to specify which mode of ROI your organization would like to use. You only need to specify a mode one time.

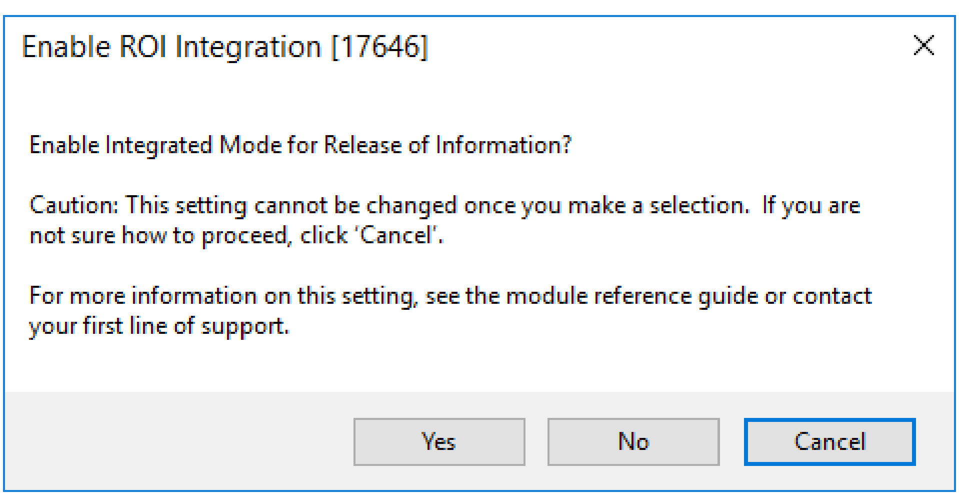
Caution: Once you specify the mode of ROI for a newly licensed system, it cannot be changed. Carefully read the process below to understand how you should select the appropriate mode.

To select an ROI mode:

1. Launch OnBase Configuration.
2. Navigate to **Medical | Release of Information | System Settings**.

   The **Enable Integrated Mode** dialog box is displayed.

Tip: If the **Enable Integrated Mode** dialog box is not displayed and other **Release of Information** menu options are enabled, your ROI mode has already been selected. No further action is required. If you believe you are using the incorrect mode of ROI, contact your first line of support.



3. Click the appropriate button:

Caution: Once you specify the mode of ROI for a newly licensed system, it cannot be changed. Carefully read the descriptions of the options below before making your selection.

- **Yes** - Enables Integrated Mode. Integrated Mode is typically used in addition to another ROI solution (e.g., Epic ROI) and contains only functionality necessary to locate, gather, and release OnBase medical records documents.
- **No** - Enables non-Integrated Mode. Non-Integrated Mode is typically used as a primary ROI solution. It contains functionality necessary to locate, gather and release OnBase medical records documents, while also allowing users to leverage requester-related functionality such as the ability to store requester information, bill requesters, and generate rejection letters to requesters.
- **Cancel** - Does not enable any mode. If you are unsure how to proceed, click **Cancel** and contact your first line of support.

Upon selecting either **Yes** or **No**, the **Release of Information System Settings** dialog box is displayed, and your ROI system is now either using Integrated Mode or non-Integrated Mode, respectively.

Note: If you selected **Yes**, refer to the **Release of Information (Integrated)** module reference guide and help file going forward. If you selected **No**, refer to the **Release of Information** module reference guide and help file going forward. This should be clearly communicated to all users and administrators.

Disabling Access to Legacy Release of Information

If your system is licensed for Release of Information in addition to one of the legacy versions of ROI, it is strongly recommended you restrict user access to ROI in the OnBase Client to avoid potential confusion. By default, users are able to access ROI in the OnBase Client when your system is licensed for one of the following.

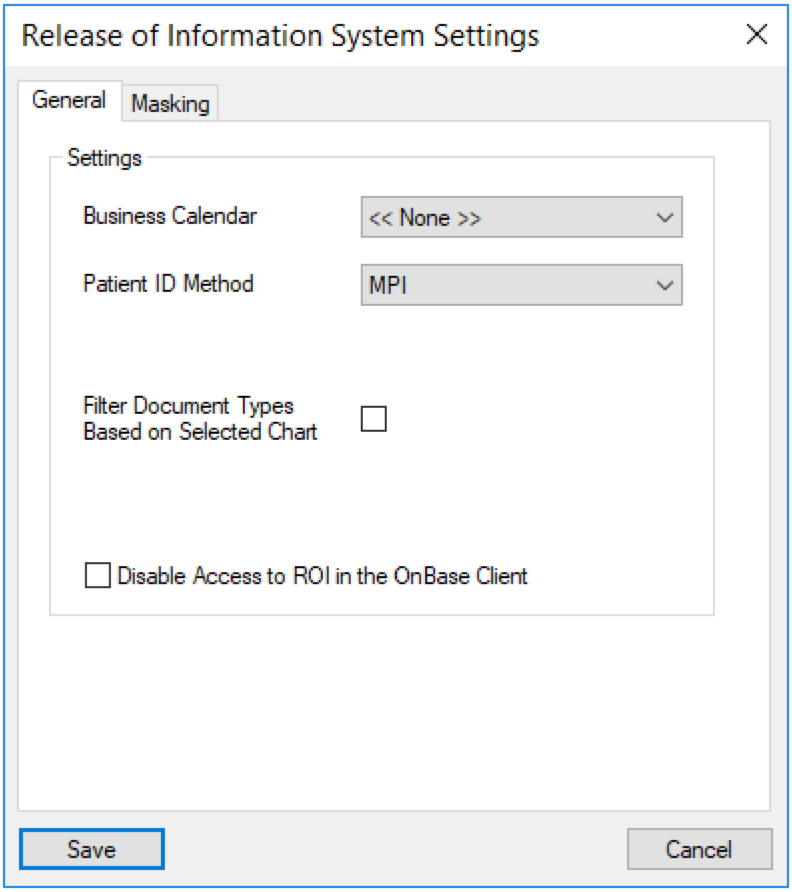
- Medical Records Release of Information
- Medical Records Release of Information (Standalone)

Requests created in the OnBase Client are not displayed in the Medical Records Unity Client and vice versa.

To disable access to ROI in the OnBase Client:

1. From the Configuration module, navigate to **Medical | Release of Information | System Settings**.

   The **Release of Information System Settings** dialog box is displayed.



2. Select the **Disable Access to ROI in the OnBase Client** option.

Note: This option is not displayed if you are not licensed for Medical Records Release of Information or Medical Records Release of Information (Standalone).

3. Click **Save**. Users are now restricted from accessing ROI functionality in the OnBase Client.

Configuring User Group Rights

This section provides the User Group configuration specific to Release of Information only.

For additional information regarding User Group, User, Document Type and Keyword Type configuration, see the System Administration module reference guide or help file.

Configuring ROI Privileges

To grant ROI privileges:

1. From the Configuration module, select **Users | User Groups/Rights**.
2. Select a User Group.

3. Click **Medical Rec Privileges**.
4. Select the **ROI** tab.
5. Assign the Release of Information privileges you want to grant the User Group.

Note: A user must be granted one or more of the following privileges to access the **Release of Information** layout in the Medical Records Unity Client.

Privilege	Description
Create	Allows users to create new ROI requests. **Note:** Users who only have this privilege can only create a request from the ROI interface. They cannot create them from other contexts (e.g., Chart Search).
Fulfill	Allows users to modify and perform actions on an ROI request. A user with this privilege can do the following: • Add charts and documents to a request. • Remove charts and documents from a request. • Change the order of documents in a request.
Cancel	Allows users to cancel requests. When a request is canceled, it is saved in its current state and is no longer able to be modified.
User Assignment	Allows users to assign requests to other users. Assigning a request to another user grants only that user the ability to modify the request. The request is read-only to all other users. Assigning requests should be used as a way to designate who is supposed to be fulfilling the request.
Productivity Reports	Allows users to generate ROI reports from the **Admin** menu in the OnBase Client.

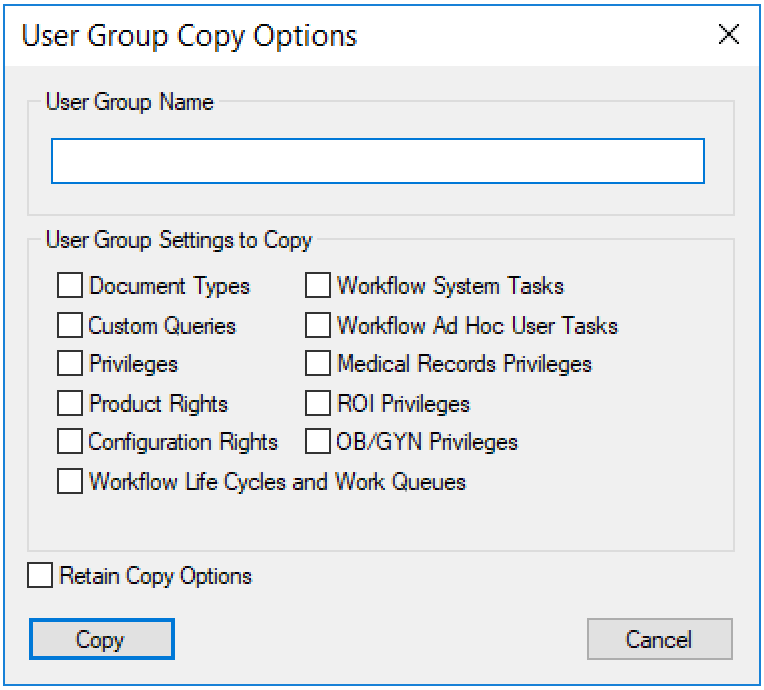
6. Click **Save** to accept the setting and return to the **User Groups & Rights** dialog box.
7. Repeat the process for all ROI User Groups.

Copying ROI Privileges to New User Groups

When you create a new User Group, you can copy the ROI privileges from an existing User Group. To create a new User Group with inherited privileges, do the following:

1. Select **Users | User Groups / Rights** to display the **User Groups & Rights** dialog box.
2. Select the User Group whose privileges you want to copy.

3. Click **Copy**. The **User Group Copy Options** dialog box is displayed.



4. Enter the name of the new User Group that should inherit settings from the existing User Group.
5. Select the appropriate **User Group Settings to Copy** from the existing User Group to the new User Group.

   The **ROI Privileges** setting includes all **Release of Information** privileges located in the **Medical Records Privileges** dialog box.
6. Select **Retain Copy Options** to have the current settings automatically selected the next time you access this dialog box.
7. Click **Copy**. The new User Group is created with the selected rights and privileges.

Configuring Log Privileges

For reporting purposes, the ROI Request Log tracks information for all ROI requests created in OnBase. To generate Release of Information reports or to purge the ROI Request Log, users must have sufficient privileges.

To assign ROI Request Log privileges:

1. From the Configuration module, select **Users | User Groups/Rights**.
2. Select a User Group and click **Log Privileges**.
3. Select the appropriate check box next to **ROI Request Log**:
   - To allow users to generate ROI reports, select the **View** column check box.
   - To allow users to purge the ROI Request Log, select **Purge** column check box.
4. Click **Save**.

Configuring Facilities

Before configuring ROI, be sure to configure all facilities that need to process ROI requests.

See the following topics:

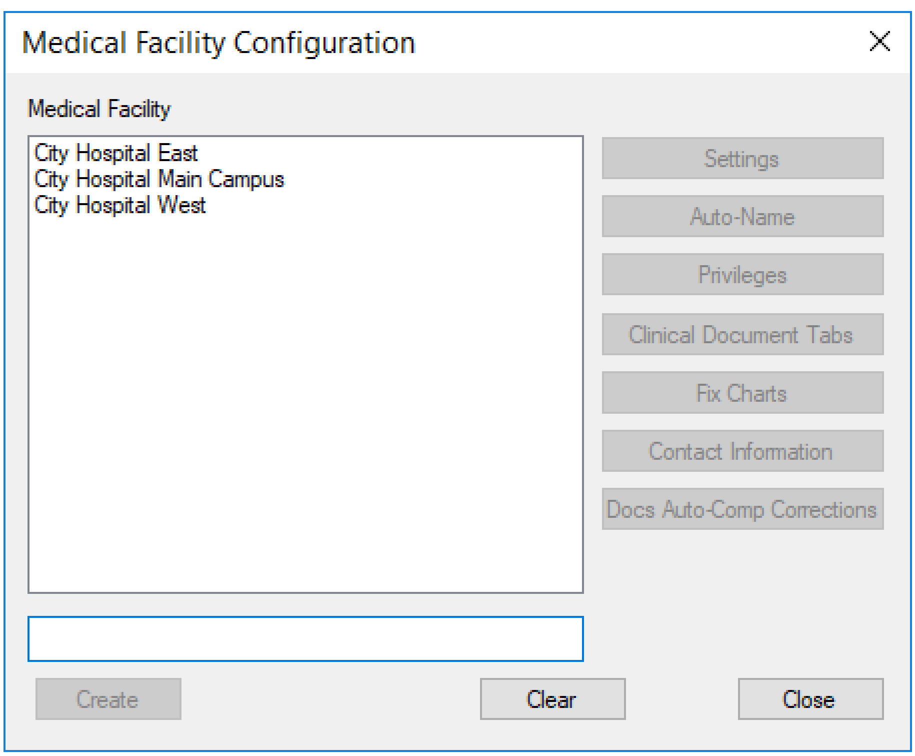
- Creating a Facility on page 166
- Assigning Facility Privileges on page 167
- Configuring Facility Contact Information on page 168

Creating a Facility

When an ROI request is created, it is assigned to a configured facility. Facilities are created in OnBase Configuration.

To create a facility:

1. Select **Medical | Facilities | Facility Configuration**. The **Medical Facility Configuration** dialog box is displayed.



Note: The **Medical Facility Configuration** dialog box may include additional configuration options, depending on system licensing. This procedure addresses only the configuration steps necessary for ROI.

2. Type the name of a facility in the field provided.
3. Click **Create**. The name is added to the **Medical Facility** list.
4. Assign users privileges to the facility. See Assigning Facility Privileges on page 167.

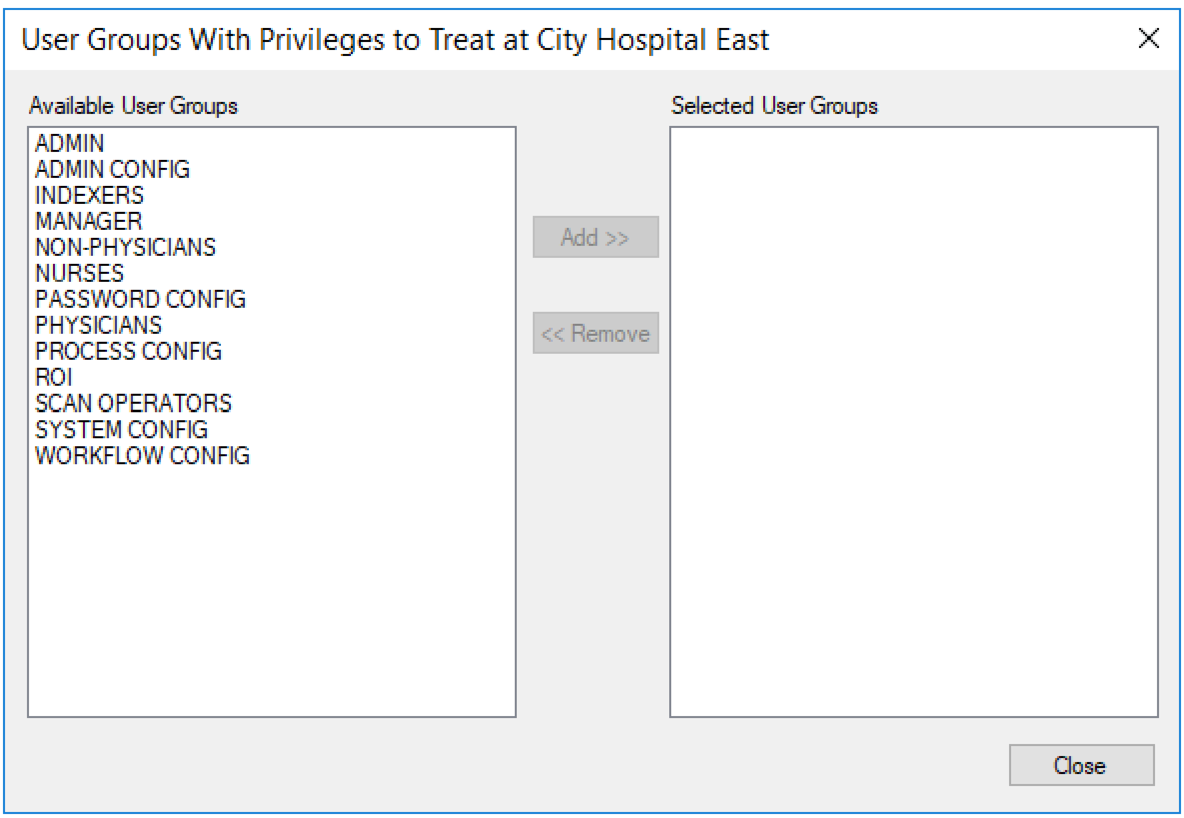
Assigning Facility Privileges

To create or view an ROI request for a facility, users must have privileges to the facility. Assign users privileges to all facilities where they need to create or manage ROI requests.

Facility privileges may also affect chart access in the Medical Records Unity Client and OnBase Client. For more information, see the **Medical Records Unity Client** module reference guide.

To assign facility privileges:

1. Select a facility from the **Medical Facility Configuration** dialog box.
2. Click **Privileges**. The **User Groups with Privileges to Treat** dialog box is displayed.



3. From the **Available User Groups** list, select a User Group.
4. Click **Add** to add the User Group to the **Selected User Groups** list.
5. Repeat for all User Groups that you want to assign to the facility.
6. Click **Close**.

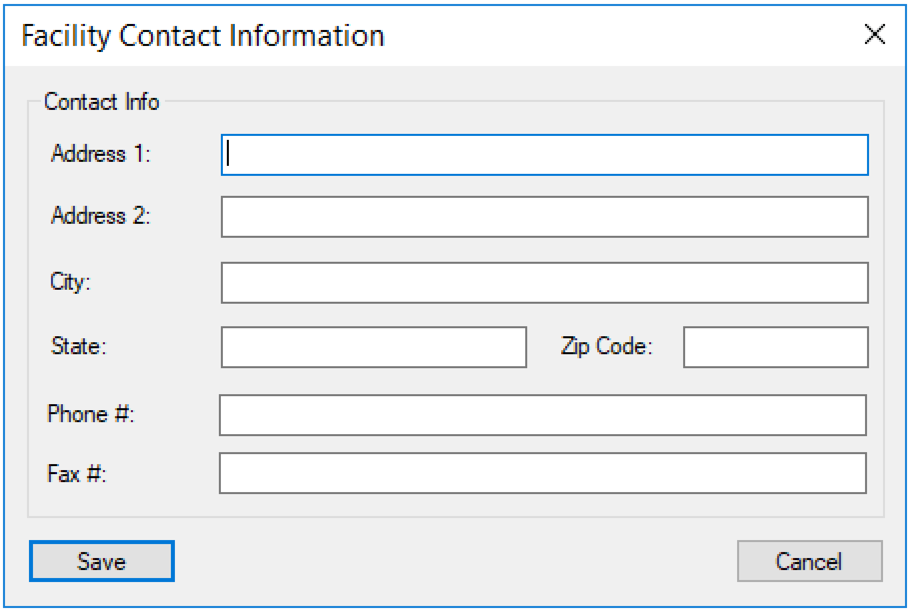
Configuring Facility Contact Information

Facility contact information can be used to populate facility placeholders used in ROI templates. These XML placeholders can include the facility address, city, state, zip code, phone number, and fax number.

Note: For more information on the corresponding XML paths, see Facility Information on page 210.

To configure contact information for a facility:

1. Select **Medical | Facilities | Facility Configuration**.
2. Select a facility from the **Medical Facility Configuration** dialog box.
3. Click **Contact Information**. The **Facility Contact Information** dialog box is displayed.



4. Enter the appropriate contact information in the form.
5. Click **Save**.

Configuring Document Types

To be included in an ROI request, a document must belong to a Document Type that satisfies one of the following criteria:

- The Document Type belongs to a medical record Document Type Group. You can configure these Document Types to be attached to ROI requests by default, based on the Request Type.
- The Document Type is configured to be retrieved by the Medical Records Custom Query, which is selected under **Medical | User Interface Settings | Medical Client Settings**. You can configure Request Types to automatically attach Medical Records Custom Query documents to ROI requests.
- The Document Type is configured to be retrieved by a custom query that the fulfiller of an ROI request has rights to execute. The fulfiller of an ROI request can manually attach documents from a custom query when preparing the request for processing.

Other documents can be dynamically generated and added to a request packet by means of Document Composition templates. See Configuring ROI Facility Settings on page 197.

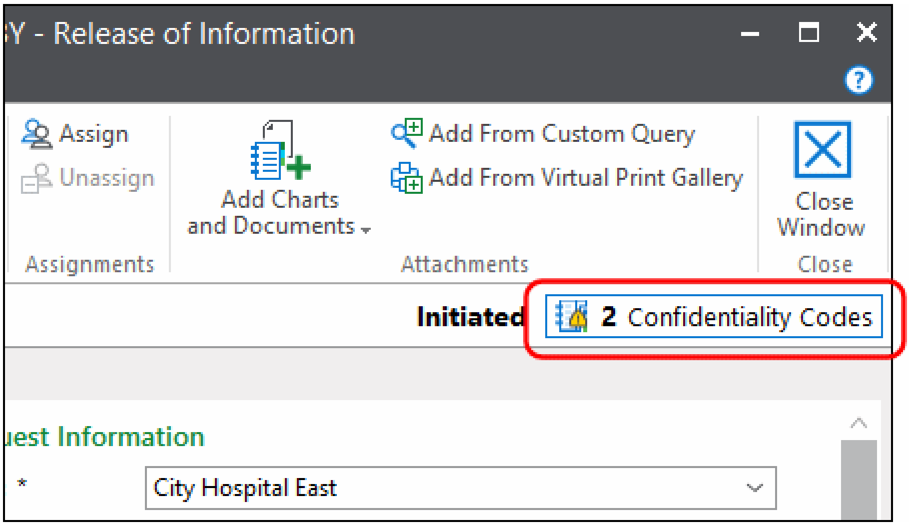
Avoiding Problems with Document Types

Certain Document Type configurations may impede or adversely affect the generation of ROI request packets. Please review the following considerations for information about potential conflicts:

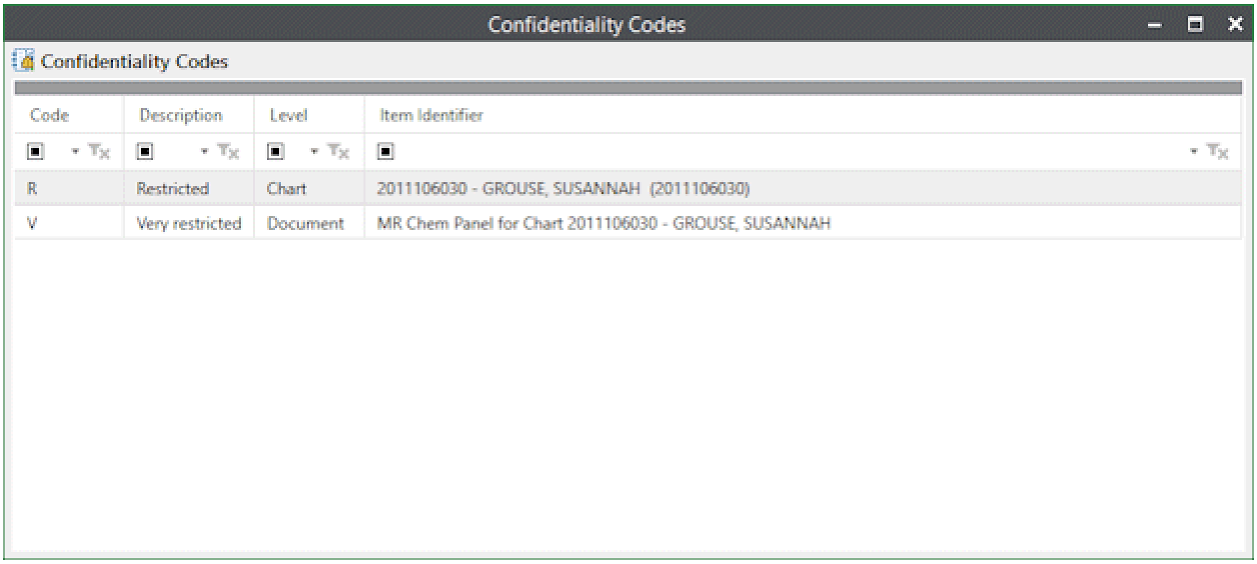
- PDFs that require a password to open the document are not supported in ROI request packets. If such a PDF is attached to an ROI request, packet generation for that request will fail.
- PCL documents containing a large number of pages (e.g., hundreds or thousands) may adversely affect the performance of request packet generation. If possible, break up large PCL documents into smaller documents with fewer pages.
- XML documents may not include page breaks where expected. If an XML Document Type is associated with a style sheet containing page breaks, the page breaks defined in the style sheet will not be respected when XML documents undergo the packet generation process.

Configuring Confidentiality Codes

On systems licensed for the HL7 module, confidentiality codes can be used to classify patients, charts, and documents as confidential. In the Medical Records Unity Client, ROI requests may display a confidentiality code notifier indicating the number of confidentiality codes in effect on items attached to the request.



Upon clicking the notifier, ROI users can view information about the confidentiality codes in effect.



For the confidentiality code notifier to be displayed:

- The **Enable Confidentiality Codes** setting must be selected in OnBase Configuration under **Medical | User Interface Settings | Unity | Settings**.
- The request must have attachments with confidentiality codes applied.
- The user viewing the ROI request must have rights to the confidentiality codes applied to attachments. Rights are assigned in OnBase Configuration under **Medical | Confidentiality Codes**.

Note: Confidentiality codes do not hide patients, charts, or documents in the Release of Information layout. Users with access to ROI requests do not require rights to confidentiality codes to see attachments with confidentiality codes applied. Rights to confidentiality codes are needed only to view information about confidentiality codes in effect on items attached to the request.

For information about confidentiality codes, including configuration steps and how they affect other contexts within the Medical Records Unity Client, see the **Medical Records Unity Client** documentation.

Configuring ROI

Release of Information provides the ability to fulfill ROI requests efficiently and quickly through printout, or print to file. The following topics include procedures for configuring ROI request types, system settings, and the ROI process.

- Pre-Configuration on page 171
- Creating a Request Type on page 174
- Configuring Display Columns on page 181
- Configuring Packet Templates on page 182
- Creating a Business Calendar on page 188
- Configuring ROI System Settings on page 193
- Configuring ROI Templates on page 194
- Configuring ROI Facility Settings on page 197

Pre-Configuration

In addition to the settings available from the Configuration module's **Medical | Release of Information** menu, the following items must be configured:

- Assign User Group Privileges for Release of Information. See Configuring ROI Privileges on page 163.
- Configure Document Types to store each of the following:
  - Cover sheets
  - Inventory pages
- Configure a Document Type to store requests. For more information on configuring this Document Type, see Configuring the ROI Archive Document Type on page 172.

- Create a **Request ID** Keyword Type. The Keyword Data Type should be defined as **Numeric (Up to 20 Digits)**.
- If you are using Release of Information with medical records charts, and you want to automatically include non-medical record documents in ROI requests, ensure a Custom Query is configured to pull non-medical record documents into the chart. This Custom Query must be selected in **Medical Client Settings** configuration.

Note: This functionality is not available if you do not have an HL7 Listener license.

You can configure additional custom queries to allow users to retrieve and add documents to an ROI request manually. Ensure users have rights to these custom queries.

Configuring the ROI Archive Document Type

Configure a Document Type to archive ROI request packets after they are generated. If necessary, you can create a Document Type for each facility that uses the ROI module.

Ensure each ROI Archive Document Type follows the recommendations in the following topics:

- File Format on page 172
- Keyword Types on page 172
- Revisions on page 174

After an ROI Archive Document Type is configured, it can be assigned to one or more facilities. For more information on assigning the Document Type, see Configuring ROI Facility Settings on page 197.

File Format

Select **PDF** as the Default File Format for ROI Archive Document Types.

Keyword Types

When a packet is archived to the ROI Archive Document Type, it is indexed with applicable Keyword Values from the request.

Assign the **Request ID** Keyword Type to every Document Type used for archiving request packets. The **Request ID** value is automatically populated on the archived request packet. For more information on this Keyword Type, see Pre-Configuration on page 171.

Patient and Chart Metadata

If OnBase is licensed for HL7, you can assign patient and chart Keyword Types to the ROI Archive Document Type. These Keyword Types must be mapped to chart data fields under **Medical | Charts | Data Fields**.

The population of patient and chart Keyword Types varies depending on the system's **Patient ID Method** and whether the generated packet contains multiple patients or charts.

- If the **Patient ID Method** is MPI:

Packet Contains... **Multiple MPIs?**	**Multiple MRNs?**	**Multiple Charts?**	**Keywords Populated**
Yes	N/A	N/A	Request ID
No	Yes	N/A	Request ID MPI-Level Keywords
No	No	Yes	Request ID MPI-Level Keywords MRN-Level Keywords
No	No	No	Request ID MPI-Level Keywords MRN-Level Keywords Chart-Level Keywords

- If the **Patient ID Method** is MRN:

Packet Contains... **Multiple MRNs?**	**Multiple Charts?**	**Keywords Populated**
Yes	N/A	Request ID
No	Yes	Request ID MRN-Level Keywords
No	No	Request ID MRN-Level Keywords Chart-Level Keywords

For more information on the **Patient ID Method**, see Configuring ROI System Settings on page 193.

Tip: Assign an AutoFill Keyword Set using the MPI or MRN as the primary value to automatically generate other Keyword Values for the packet.

Revisions

Make the ROI Archive Document Type revisable to allow multiple revisions of a request. Multiple revisions of a request can be created when a request packet is generated before the request is complete. If the Document Type is non-revisable in this scenario, when the request is complete, the final request packet overwrites the existing packet that was previously generated.

Note: You can only make a Document Type revisable when licensed for EDM Services. For more information on revisable Document Types, see the **EDM Services** documentation.

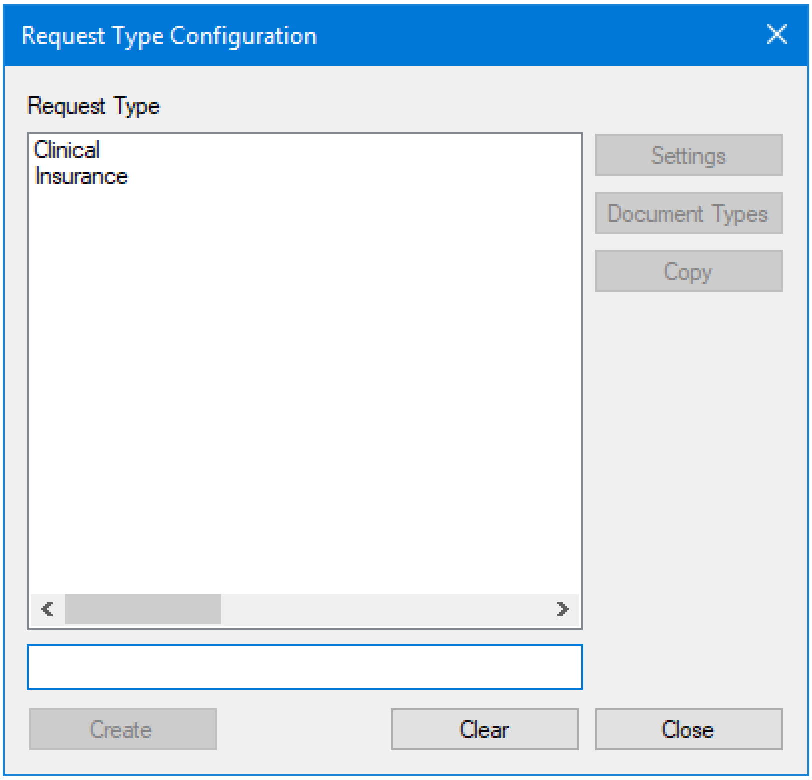
Creating a Request Type

Request Type Configuration allows you to create standard request types for typical ROI requests. Request Types determine the billing options and default document sort order.

When creating a request, a user must choose a Request Type to specify the purpose for the request. Available Request Types are determined by the selected facility. You can assign a Request Type to one or all facilities.

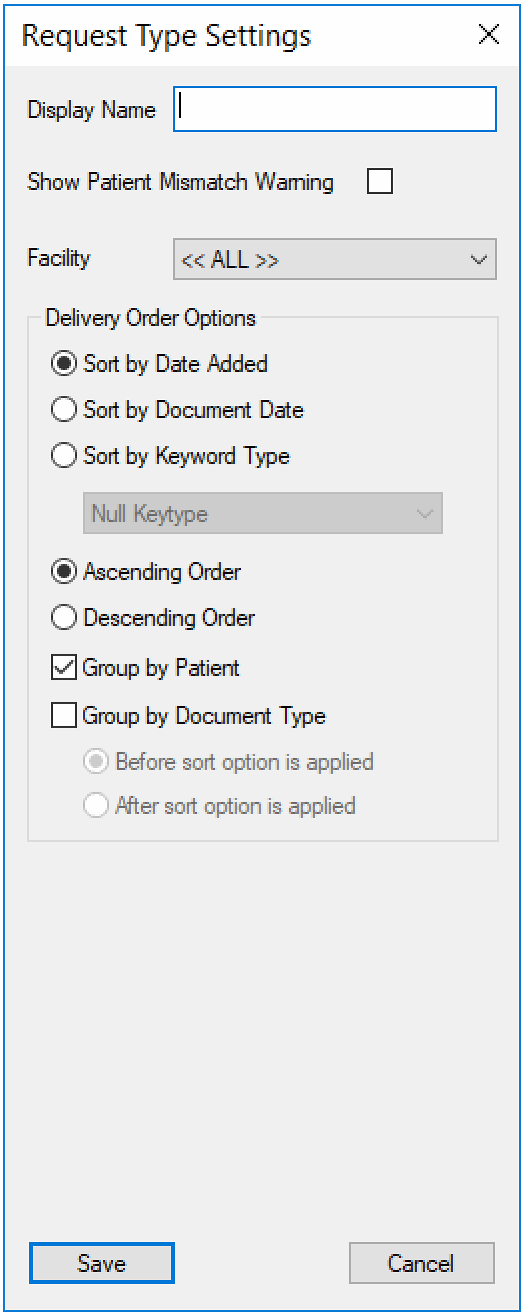
To create and configure a Request Type:

1. In the Configuration module, select **Medical | Release of Information | Request Types**. The **Request Type Configuration** dialog box is displayed.



2. Type a name for the Request Type and click **Create**. To modify an existing Request Type, select it from the list and click **Settings**.

   The **Request Type Settings** dialog box is displayed.



3. Enter the appropriate **Request Type Settings**.

Request Type Setting	Description
Display Name	Enter a display name for the Request Type in the **Display Name** field. If multiple facilities use similar but different Request Types, you may consider differentiating these at the Request Type level and making the display name something more generic (e.g., **Legal**, **Personal**, **Doctor-to-Doctor**, etc.).
Show Patient Mismatch Warning	Select the **Show Patient Mismatch Warning** option to prompt users when charts or documents on a request belong to different patients. The prompt is shown in the following scenarios: • When a user attaches charts and/or documents for a patient other than the patients currently attached to the request. • When changing the Request Type of a request from one that does not have this option selected to a Request Type that does have this option selected, and the request contains charts and/or documents with different MRNs or MPIs. **Note:** The **Show Patient Mismatch Warning** option is not available if you do not have an HL7 Listener license.
Facility	Use the **Facility** drop-down to specify which facility you'd like the Request Type to be linked to. If you do not specify the facility, the Request Type is available for all facilities by default.

4. Select a **Delivery Order Option** to configure the default order in which request documents are sorted for delivery. Users can manually modify the sort order for individual requests in the Medical Records Unity Client.

Delivery Order Option	Description
Sort by Date Added	Documents are sorted by the date and time they were added to the request.
Sort by Document Date	Documents are sorted by their Document Dates.
Sort by Keyword Type	Documents are sorted by their values for the selected Keyword Type. From the drop-down, select the Keyword Type to sort by. **Note:** Documents without a value for the selected Keyword Type may need to be sorted manually.
Ascending Order	Documents are sorted in ascending order.
Descending Order	Documents are sorted in descending order.

Delivery Order Option	Description
Group by Patient	Documents are grouped by patient. This option applies to requests with multiple patients attached. This option is selected by default. When this option is selected, documents in the request are first grouped by patient before any other grouping or sorting options are applied. This option does not affect requests where the **Separate by Chart** option is selected on the release order screen. When **Separate by Chart** is selected, request documents are grouped by patient automatically.
Group by Document Type	Documents are grouped by Document Type. This option is used in conjunction with the **Sort by** options, described above. Select one of the following options: • **Before sort option is applied** - Documents are first grouped by Document Type and then sorted by the selected **Sort by** option (i.e., because the Document Type sort is primary, all documents of a Document Type are grouped and listed together). • **After sort option is applied** - Documents are first sorted by the selected **Sort by** option and then grouped by Document Type within the selected sorting (i.e., because the Document Type sort is secondary, all documents of a Document Type may not be listed together). **Note:** Users cannot manually group documents by Document Type after a sort option is applied. They can only group documents by Document Type before the sort option is applied.

5. Click **Save** to accept the settings and exit the **Request Type Settings** dialog box.
6. If you are using ROI with medical records charts, proceed to the next topic, Choosing Chart Document Types to Include on page 177.

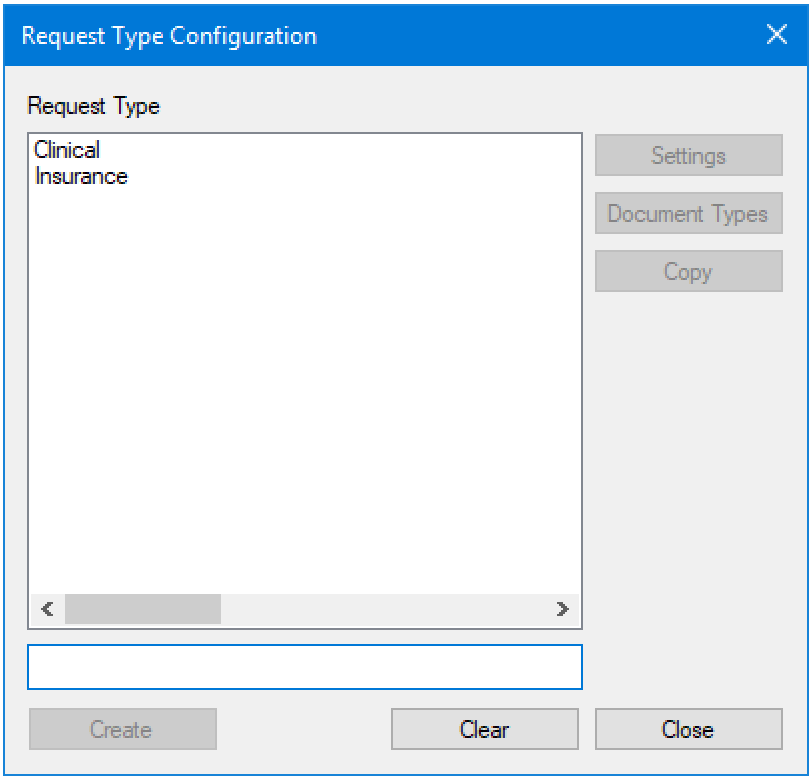
Choosing Chart Document Types to Include

You can choose the default Document Types to be included for ROI Request Types. Users are also able to manually add Document Types using the **Add Attachments** wizard in the ROI interface.

Note: Only systems with an HL7 Listener license can configure Request Types to include default Document Types.

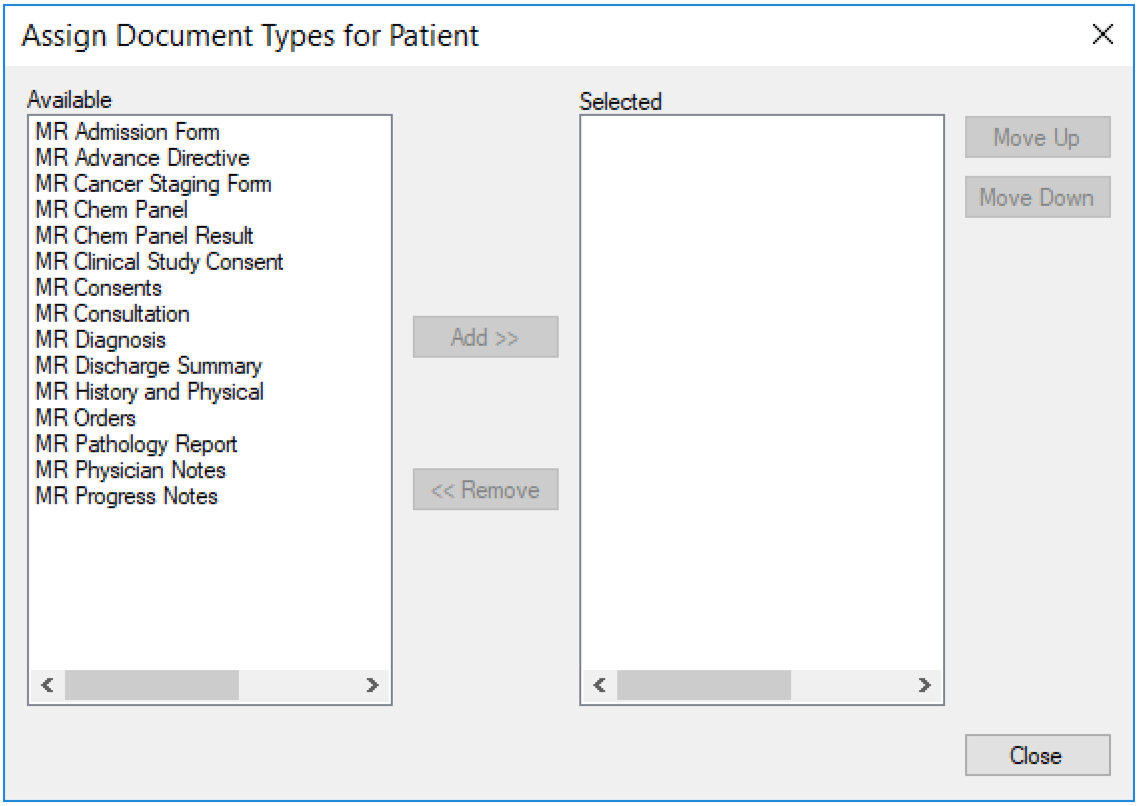
Note: If you need to use certain Document Types to retrieve external system documents, these Document Types either must belong to a Medical Records Document Type Group, or they must be retrieved using the Medical Records Custom Query. External document retrieval is only available if your system is licensed for Report Capture for Meditech.

1. Select the Request Type from the **Request Type Configuration** dialog box.



2. Click **Document Types**. The **Assign Document Types** dialog box is displayed.

Note: The **Document Types** button is not available if you do not have an HL7 Listener license.



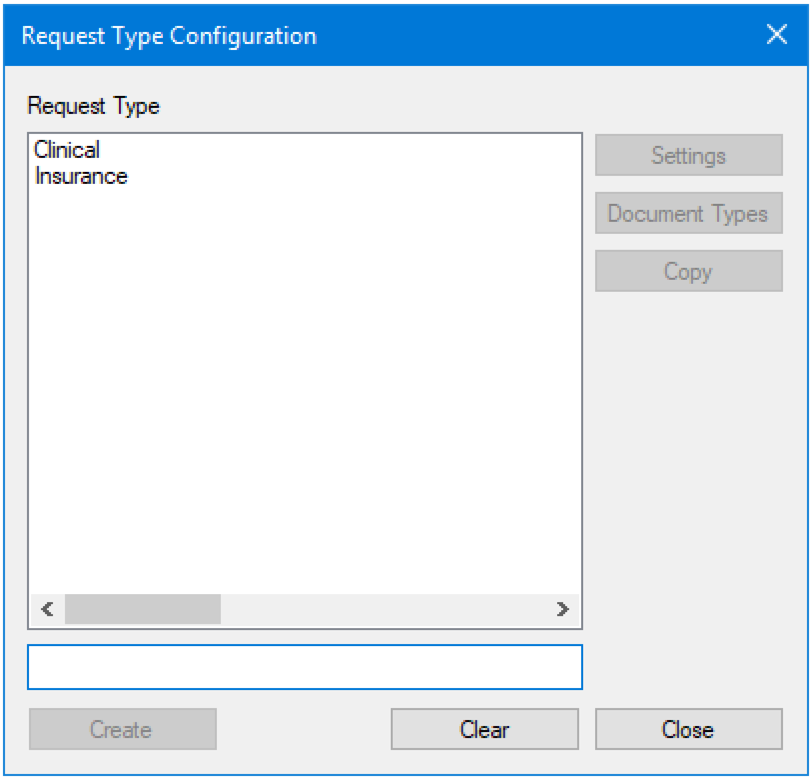
3. From the **Available** list, select any Document Type that should be included in all requests for this Request Type.
4. If the Request Type is set up to group documents by Document Type, configure the default order in which Document Types should be printed. To change a Document Type's position in the sequence, select it and click the **Move Up** or **Move Down** button.
5. Click **Close** when finished.

Copying Existing Request Types

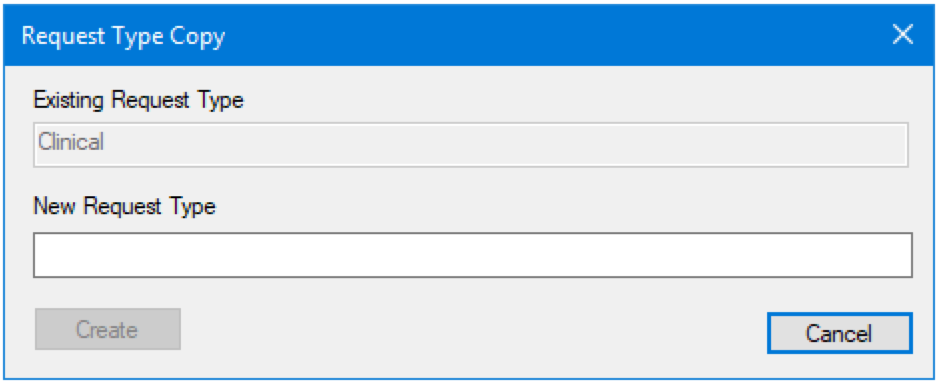
When you create a new Request Type, you can copy the settings and Document Types assigned from an existing Request Type.

To copy an existing Request Type:

1. In the Configuration module, select **Medical | Release of Information | Request Types**. The **Request Type Configuration** dialog box is displayed.



2. Select an existing Request Type from the **Request Type** list.
3. Click **Copy**. The **Request Type Copy** dialog box is displayed.



4. Enter a name for the copied Request Type in the **New Request Type** field.
5. Click **Create**. The new Request Type is added to the Request Type list.

Configuring Display Columns

You can customize which display columns are available to ROI users in certain contexts. Display columns are categories that display information from listed medical records charts or requests. Users can then organize these lists using the display columns.

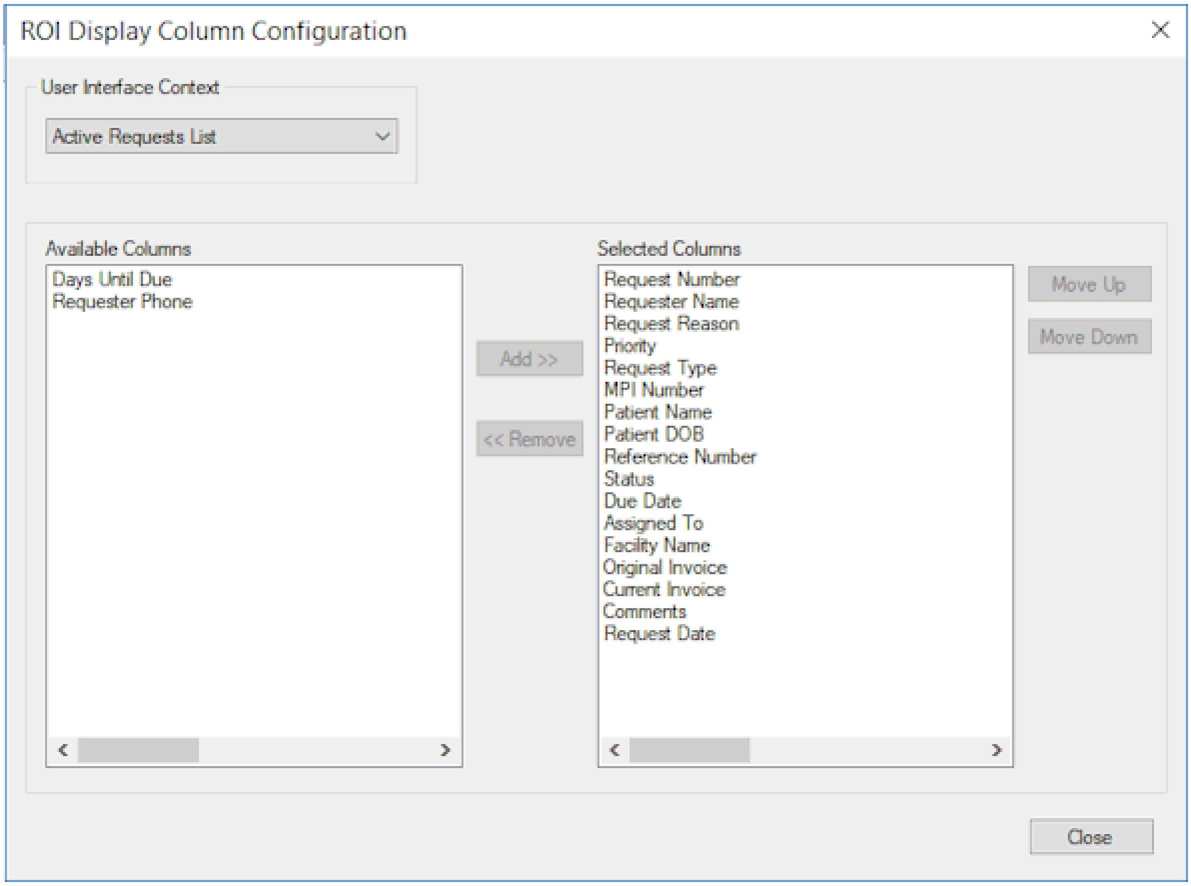
For column descriptions, see ROI Columns and Search Fields on page 510.

To configure display columns for **Select Charts** screen of the Add Attachments wizard:

1. From the Configuration module, select **Medical | Release of Information | Display Columns**.

Note: The **Display Columns** menu option is not available if you do not have an HL7 Listener license.

The **ROI Display Column Configuration** dialog box is displayed.



2. From the **User Interface Context** drop-down list, select the Release of Information interface context to configure:

Context	Description
Active Requests List	Allows you to configure which columns are displayed in the **Active Requests** list.
Add Attachments - Chart List	Allows you to configure which columns are displayed in the **Select Charts** dialog box of the **Add Attachments** wizard. **Note:** The Add Attachments wizard is not available if you do not have an HL7 Listener license.
Search Requests List	Allows you to configure which columns are displayed in the **Requests** list of the **Request Search** context.

3. To add one or more display columns to the selected context, select the appropriate column names from the **Available Columns** list and click **Add**.

   To remove one or more display columns from the selected context, select the appropriate column names from the **Selected Columns** list and click **Remove**.
4. The order of the columns in the **Selected Columns** list determines the order in which columns are displayed to the user.

   To move a column to the left, select it in the **Selected Columns** list and click the **Move Up** button until the it is at the desired order.

   To move a column to the right, select it in the **Selected Columns** list and click the **Move Down** button until it is at the desired order.
5. Click **Close** to save your changes.

Configuring Packet Templates

Before a request is released, all of the request attachments and system-generated documents (cover sheet, invoice, and inventory pages) are compiled into a packet. A packet is the request fulfillment, or deliverable, sent to the requester. A packet is generated into a PDF document, which can then be printed or saved to file.

For users to be able to generate packets, you must configure a packet template for each ROI facility. See the following sections for information on configuring a packet template.

- Packet Template Pre-Configuration on page 183
- Creating a Text Overlay on page 183
- Creating a Packet Template on page 186
- Configuring ROI Facility Settings on page 197

Packet Template Pre-Configuration

Before creating a packet template, ensure you have properly configured the following items:

- A request ID Keyword Type - This is the Keyword Type used to store the unique, system-generated request ID.
- An archival Document Type - This is the Document Type where the request packet PDF is stored after it is generated.

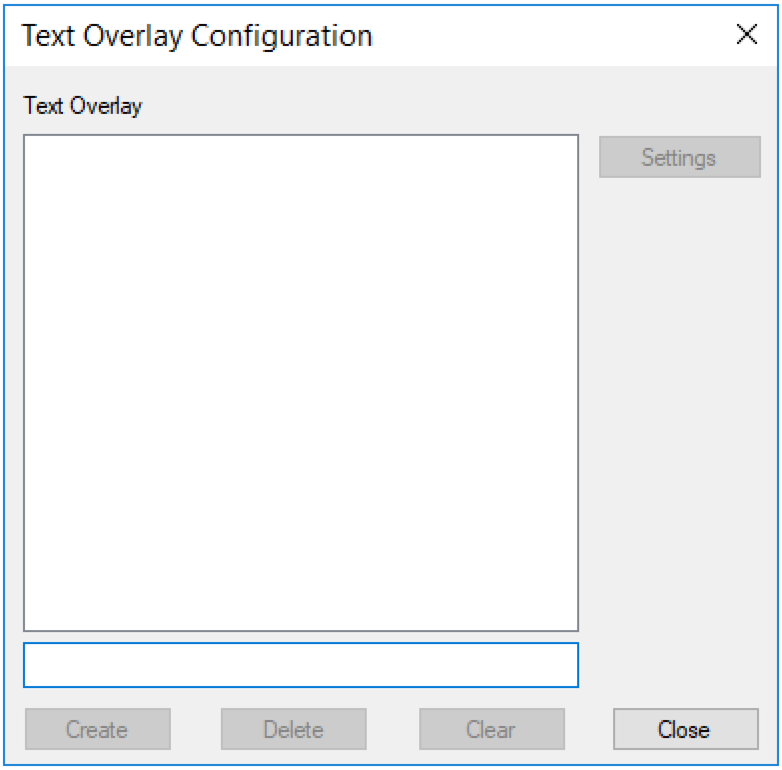
Note: For more information on configuring Keyword Types and Document Types, see the **System Administration** module reference guide or help file.

Creating a Text Overlay

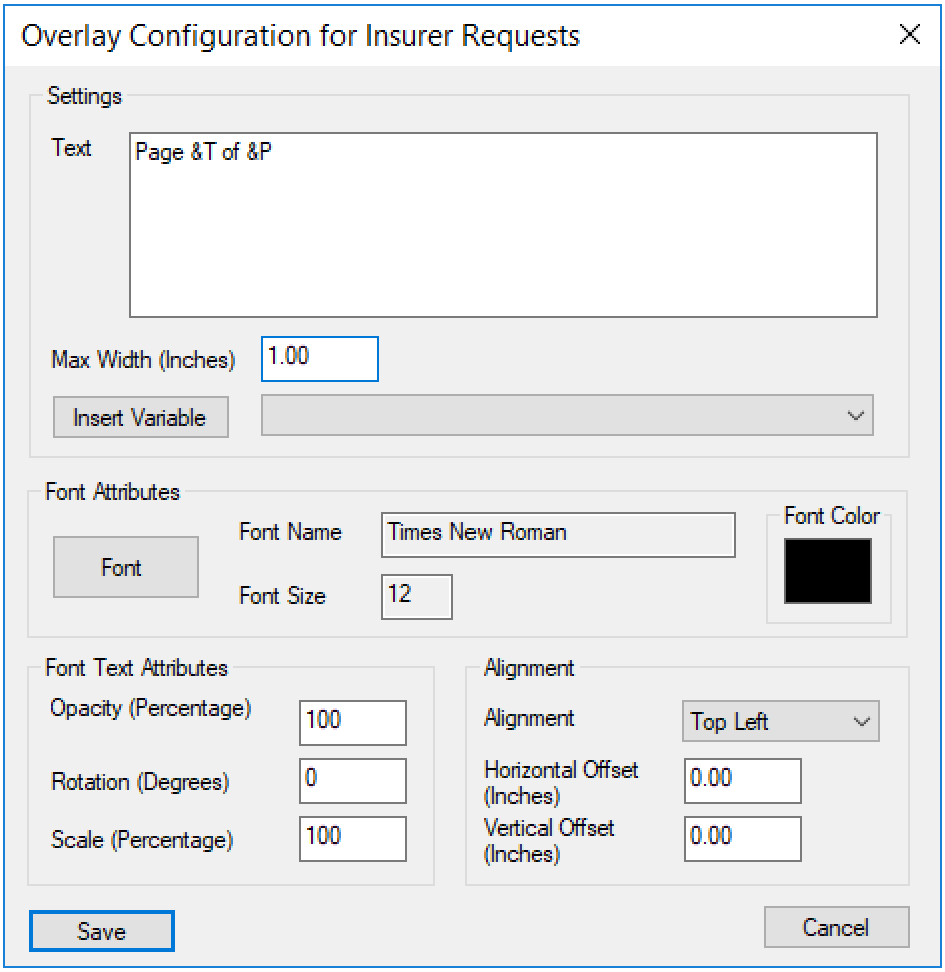
When a packet is generated, users can select a text overlay to apply to the packet. A text overlay can contain both static and dynamic text that is applied to all pages of the packet.

To create a text overlay:

1. From the Configuration module, select **Medical | Release of Information | Text Overlay Settings**.
   The **Text Overlay Configuration** dialog box is displayed.



2. Enter a name for the overlay and click **Create**.
   The **Overlay Configuration** dialog box is displayed.

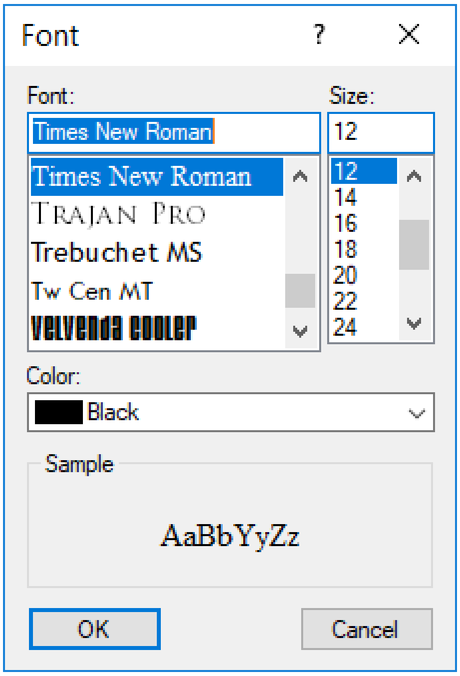


3. In the **Text** field, enter the desired text that should be displayed on each page of a packet using the overlay. Variable text is also available. When a packet is generated, all variables are dynamically replaced with data.
   To insert variable text, click the drop-down list and select the desired variable:
   - **Current page # of the entire packet** - Displays the current page number of the generated packet and is designated by the **&T** variable. The current page number is based on the total number of pages in the document and may differ from the document page number.
   - **Total number of pages of the entire packet** - Displays the total number of pages in the generated packet and is designated by the **&P** variable.

Note: The default text for a text overlay is **Page &T of &P**. For example, page 13 of a 100-page packet would read **Page 13 of 100**.

4. In the **Max Width (Inches)** field, type the maximum width of the text overlay in inches. **0** indicates an unlimited width.

5. To change the **Font Attributes**, click the **Font** button. The **Font** dialog box is displayed.



6. Specify the font, font size, and font color.

Note: The selected font must be available on the server where the ROI Packet Generation service is running.

7. Click **OK**. The **Font Attributes** section is updated to display the current settings.
8. In the **Font Text Attributes** section, specify the following:

Font Text Attribute	Description
Opacity (Percentage)	The opacity of the font text, as a percentage.
Rotation (Degrees)	The rotation of the font text, in degrees.
Scale (Percentage)	The scale of the font text, as a percentage.

9. From the **Alignment** drop-down list, select one of the following areas for the overlay's anchor point:

Alignment	Description
Top Left	The anchor point will be in the top left corner of the page.
Top Center	The anchor point will be centered at the top of the page.
Top Right	The anchor point will be in the top right corner of the page.

Alignment	Description
Center	The anchor point will be in the center of the page.
Bottom Left	The anchor point will be in the bottom left corner of the page.
Bottom Center	The anchor point will be centered at the bottom of the page.
Bottom Right	The anchor point will be in the bottom right corner of the page.

10. In the **Horizontal Offset (Inches)** field, specify how far from the horizontal axis of the default position that the overlay will appear.
11. In the **Vertical Offset (Inches)** field, specify how far from the vertical axis of the default position that the overlay will appear.
12. Click **Save** to save the text overlay.

Editing a Text Overlay

From the **Text Overlay Configuration** dialog box, text overlays can be edited or deleted as necessary.

To edit a text overlay, select the overlay from the **Text Overlay** list and click **Settings**. Reconfigure the overlay as necessary. For more information on overlay settings, see the previous section.

To delete a text overlay, select the overlay from the **Text Overlay** list and click **Delete**.

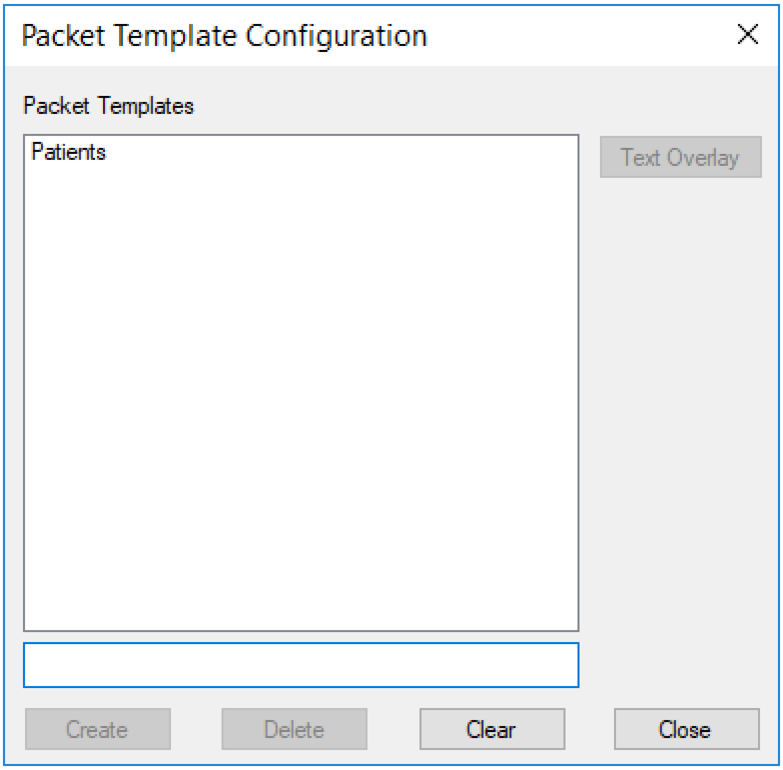
Creating a Packet Template

When a packet is generated, its pages are generated according to the specified packet template. A packet template specifies the text overlays available for users to choose from when they generate packets based on the template.

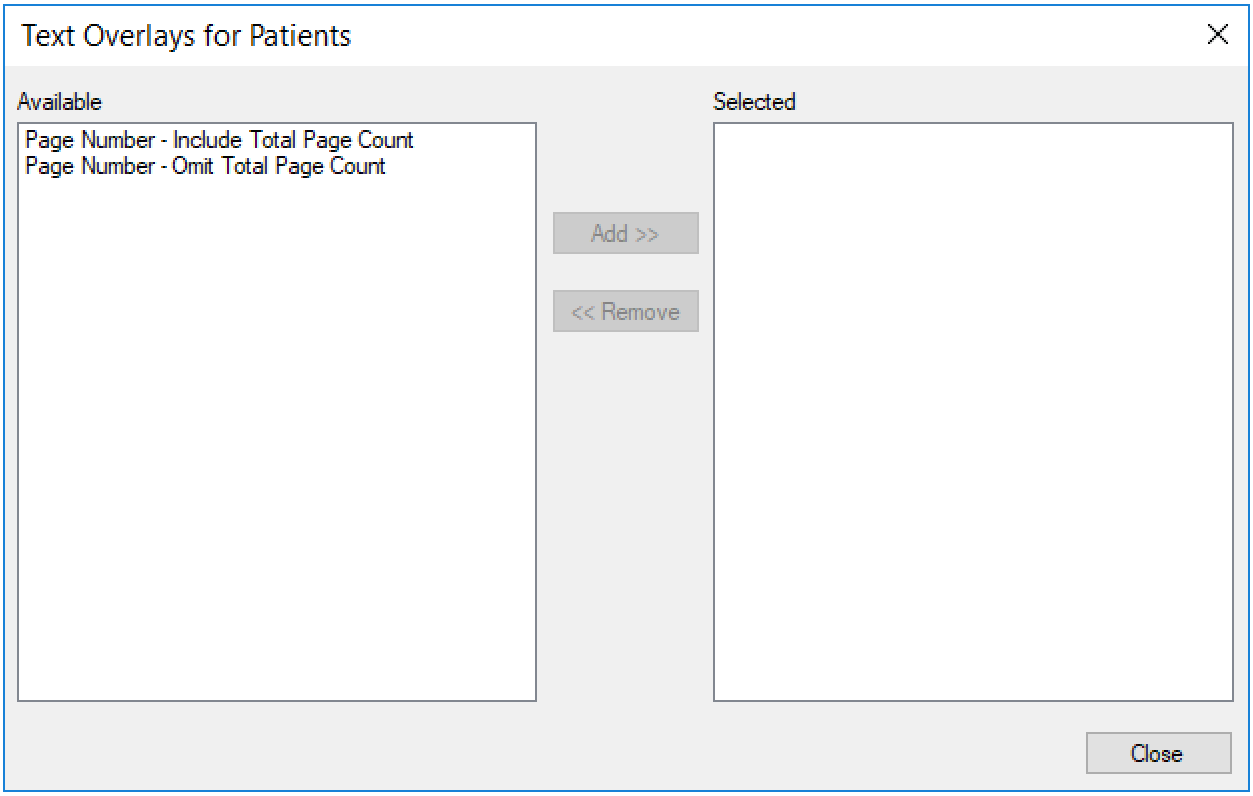
To create a packet template:

1. From the Configuration module, select **Medical | Release of Information | Packet Templates**.

   The **Packet Template Configuration** dialog box is displayed.



2. Enter a name for the template, and click **Create**. The **Text Overlays** dialog box is displayed.



3. Select the text overlays that apply to this template, and click **Add**.

   When you add text overlays to the packet template, the overlays become available for users to select when they generate packets with the template.

   To remove one or more text overlays from the template, select the overlay(s) from the **Selected** list and click **Remove**.
4. Click **Close**.

   Once packet templates are created, they can be assigned to specific facilities. For more information on selecting a default template for a facility, see Configuring ROI Facility Settings on page 197.

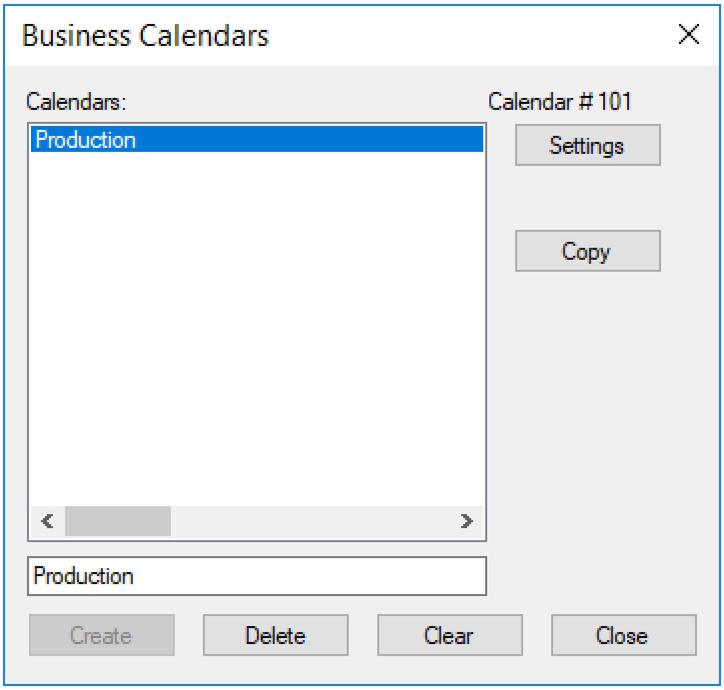
Creating a Business Calendar

Business Calendars are used to control which days are included when ROI reports calculate the total processing time for ROI requests. By default, the ROI Released Request and User Productivity reports include weekends and holidays in the total processing time. Business calendars let you exclude non-business days from request processing time.

Once you configure a Calendar, you can assign it to ROI in the next procedure, Configuring ROI System Settings on page 193. If no Calendar is assigned, OnBase will refer to the onbase32.ini file for days to exclude from processing time. See the Installation chapter for information about configuring INI settings.

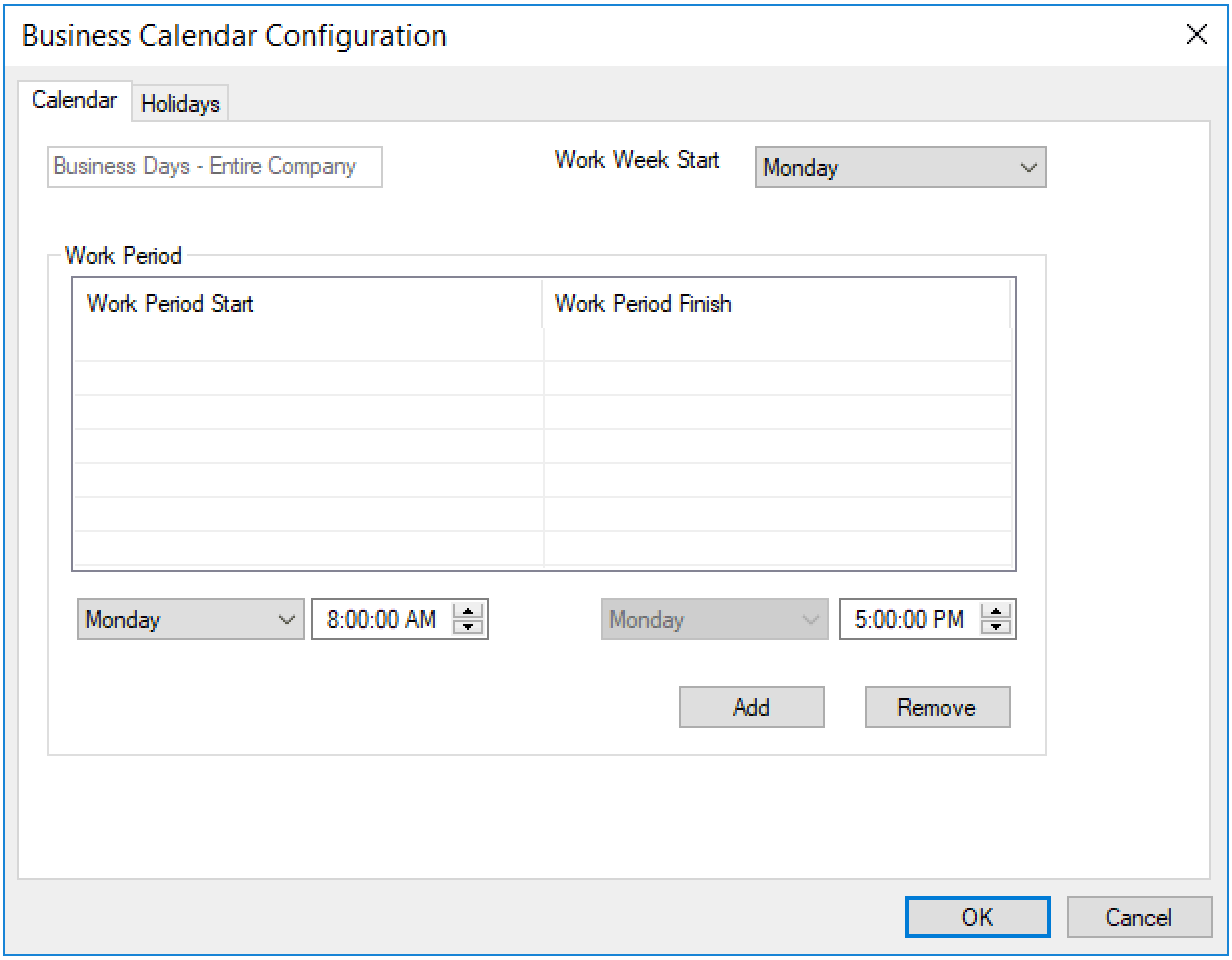
To create a business calendar:

1. In the Configuration module, select **Org Chart | Calendars**. The **Business Calendars** dialog box is displayed.



2. Type a name for the Calendar and click **Create**.

3. Click **Settings**. The **Business Calendar Configuration** dialog box is displayed with the **Calendar** tab selected. The **Calendar** tab lets you configure weekly hours of operation for your organization.

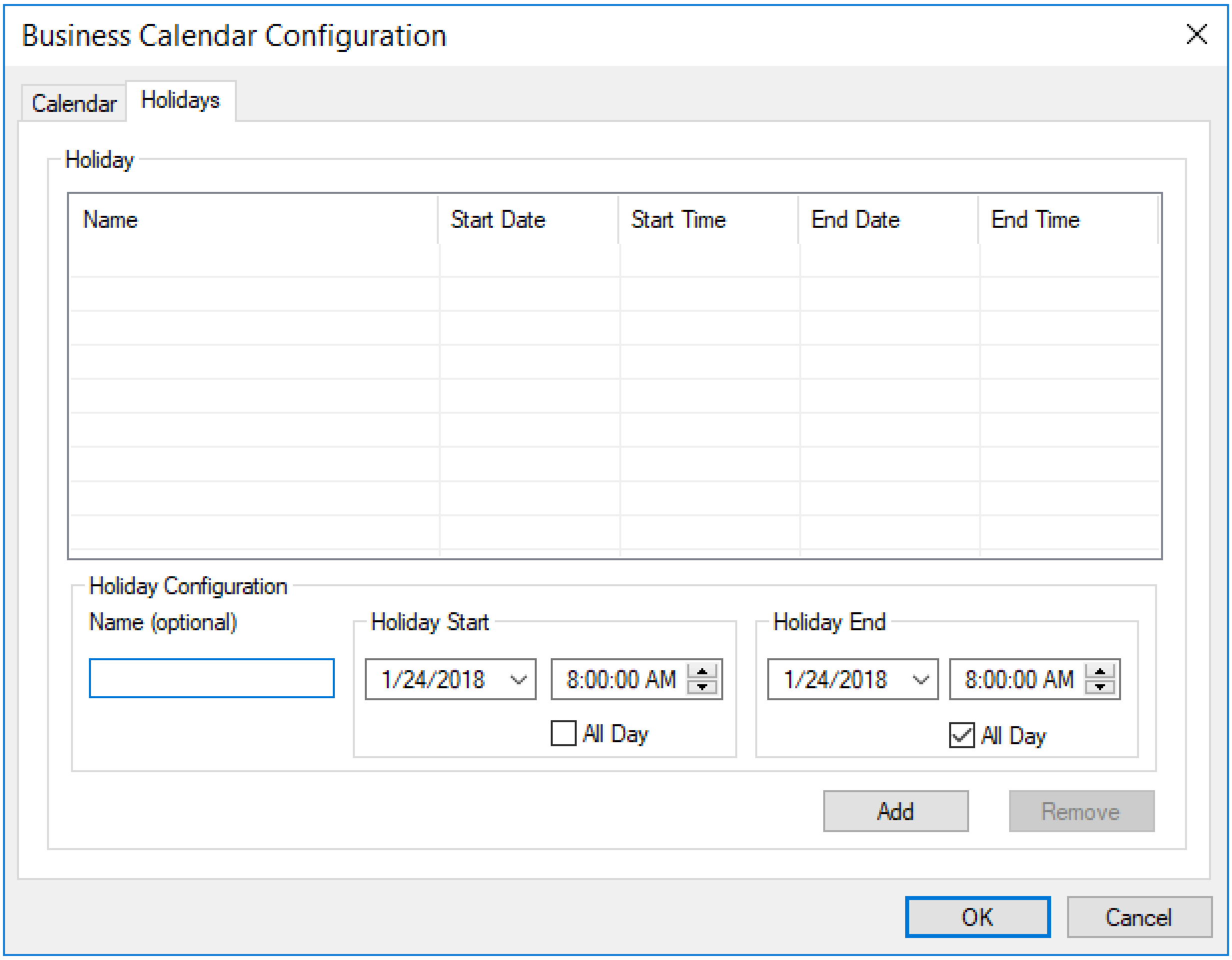


4. Select the first day of your business week from the **Work Week Start** drop-down list in the upper-right corner.
5. From the drop-down list under the **Work Period Start** column, select the first day of your business week.
6. In the adjacent time field, select or type the time when operating hours begin.
7. In the time field under the **Work Period Finish** column, select or type the time when operating hours end. By default, the work period ends on the same day it begins. If you are configuring a work period that extends into the next day, click the time field's up arrow button until the next day is displayed in the adjacent drop-down list.
8. Click **Add**.
9. Repeat steps 5 through 8 for each day of the business week. If you need to remove a work period, select it and click **Remove**.
10. Continue to the next topic.

Adding Holidays

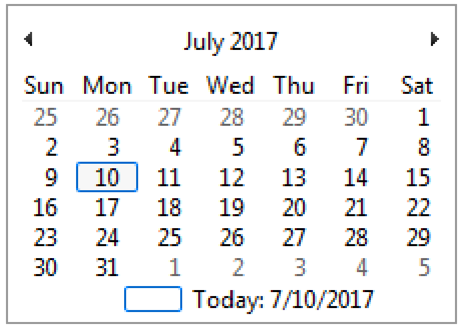
Release of Information reports will exclude any date configured as a holiday from request processing time. Even if the holiday period is configured for only a half day, the entire day will be excluded. If you assign the Calendar to a Workflow queue, half days are respected.

1. Access the **Business Calendar Configuration** dialog box. From OnBase Configuration, select **Org Chart | Calendars**.
2. Select a Calendar and click **Settings**.
3. Click the **Holidays** tab.



4. Optionally, type a name for the holiday you want to configure in the **Name** field under **Holiday Configuration**.

5. From the drop-down list under **Holiday Start**, select the start date of the holiday you want to add.

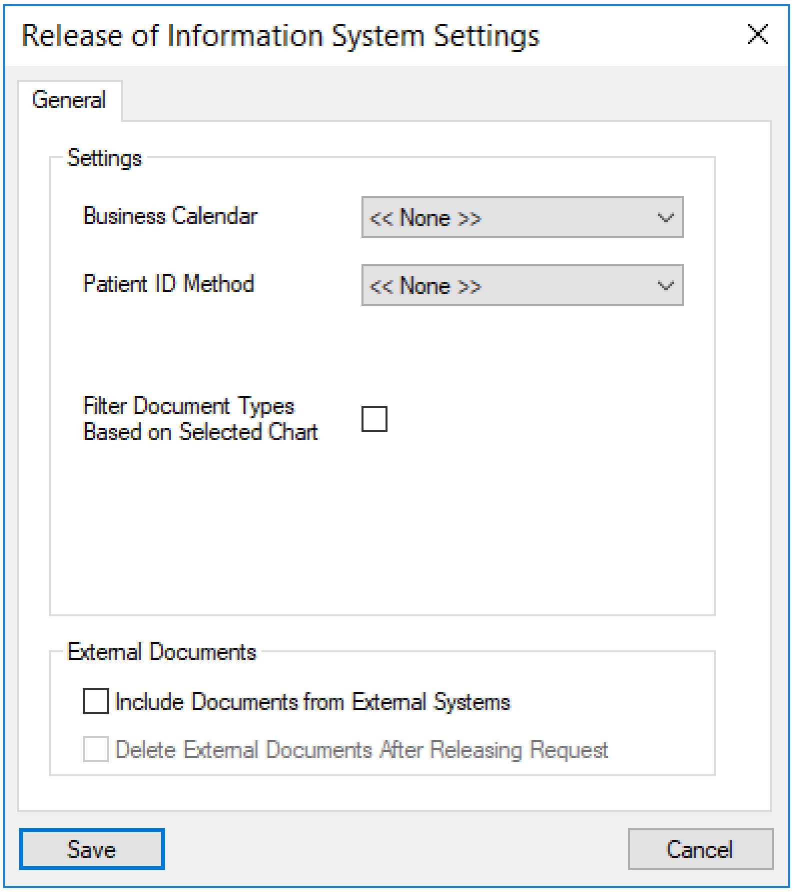


6. Select **All Day** if the holiday lasts all day.
7. If the holiday spans multiple days, select the last day of the holiday from the drop-down list under **Holiday End**.
8. Select **All Day** if the last day of the holiday lasts all day.
9. If the holiday lasts for only part of the day, select the appropriate start and end times from the time fields under **Holiday Start** and **Holiday End**. This period will be excluded from the normal working hours configured on the **Calendar** tab.
10. Click **Add** to add the holiday.
11. Repeat for each holiday you want to configure.
12. Click **OK** when you are finished.

Configuring ROI System Settings

Complete the following steps to configure general settings for processing ROI requests.

1. In the Configuration module, select **Medical | Release of Information | System Settings**. The **Release of Information System Settings** dialog box is displayed.



2. From the **Business Calendar** drop-down list, select the Calendar you configured under Creating a Business Calendar on page 188.
3. From the **Patient ID Method** drop-down list, select the primary identifier for all request types. Available options are **MPI** (master patient index) or **MRN** (medical record number).
   - Select **MPI** if patients will be identified by the MPI record. An MPI record can be associated with one or more MRN records for the same patient.
   - Select **MRN** if patients will be identified by the MRN record. The relationship between MRN and MPI records must be one-to-one. Select this option only if your system does not use MPIs or if each MPI will be associated with only one MRN.

Note: The **Patient ID Method** drop-down list is not available if you do not have an HL7 Listener license.

4. Select the **Filter Document Types Based on Selected Chart** option to filter available Document Types in the **Add Attachments** wizard based on the selected patients (MPIs or MRNs) and charts. When this option is selected, only those Document Types associated with the selected patients and charts are displayed. Clear this option to allow the user to choose from all medical record Document Types and Medical Record Custom Query Document Types, regardless of whether these Document Types contain documents relevant to the selected items.

Note: The **Filter Document Types Based on Selected Chart** option and the **Add Attachments** wizard are not available if you do not have an HL7 Listener license.

Note: If the **Disable Access to ROI in the OnBase Client** option is displayed in the **Release of Information System Settings** dialog box, see Disabling Access to Legacy Release of Information on page 162 for more information.

External Documents Settings

If OnBase is licensed for Report Capture for Meditech, the **External Documents** options are available in **General** tab of the **Release of Information System Settings** dialog box.

The following options apply to the ability to retrieve external documents using ROI in the Unity Client:

Option	Description
Include Documents from External Systems	Allows users who have **Fulfill** privileges to retrieve external system documents.
Delete External Documents After Releasing a Request	Permanently removes the external system documents retrieved for a request from the OnBase system after the request is released. **Note:** This option is only available when the Include Documents from External Systems option is selected.

Configuring ROI Templates

Note: Before configuring ROI templates, you should familiarize yourself with content relating to creating template groups, creating templates, creating placeholders, creating document fragments, and configuring conditions. For more information on these topics, see the Configuring Templates appendix in this module reference guide.

The Release of Information module allows you to create standard templates for ROI cover sheets, bills, inventory pages, and rejection letters. These templates can then be populated using information from the request. Cover sheets, inventory pages, and bills are automatically released with the request. Rejection letters and bills can be printed upon executing certain actions on a request.

Creating Templates

The information below outlines the basic process involved with creating ROI templates for cover sheets and inventory pages. Detailed information on how to perform specific template-related actions can be found in the Configuring Templates appendix of this module reference guide.

To create an ROI cover sheet or inventory page template:

1. Be sure Document Composition is successfully installed.
2. Launch Microsoft Word.
3. Navigate to the **Template Builder** tab.
4. Create a Template Group. A template group is a folder where the template should be placed. For example, you might have a template group called **ROI Cover Sheets**.

   You can also create a template group upon saving the template.
5. Create a template and name it appropriately (e.g., **Cover Sheet for Walker Hospital - East Campus**).
6. Add any generic text or images that should appear in the template (i.e., information that needs to be displayed on each document, regardless of the request).
7. Create appropriate placeholders for the template. These placeholders can be reused in other templates.

Note: Only use **XML Path** placeholders, which are part of the **External Data Source** placeholder source.

   a. Name the placeholders appropriately. For example, if you are creating a placeholder for the requester name, name the placeholder something like **Requester Name**.
   b. Enter the corresponding XPath using the XML schema in XML Schema for Template Creation - Integrated Mode on page 221.

      Placeholders pull information from the request and insert unique values of the request into the document. For example, if you need to include the requester name, you would enter **//ROIRequest/Requester/Name** when prompted to enter the XPath.
   c. To create a placeholder that lists documents included in a packet, select to insert the results as either a list or a table. All other placeholders should be configured to insert the first value returned by the XPath query.

Note: When you insert a placeholder formatted as a table, adjust the number of columns as needed. By default, the placeholder will be inserted with five columns. If the template needs to display more columns, increase the number of columns as needed.

8. Insert the placeholders into the document where needed.

9. Save the template once you have finished work on it.

Tip: To avoid confusion when assigning templates, you should devise a naming convention for templates going forward if you anticipate having a large number of templates in your system.

10. Configure template options appropriately.

Note: For more information on template options, see Configuring Template Options on page 246.

As a best practice for ROI purposes, in addition to other template options you configure, you should configure the following template options accordingly:

- Select the desired Document Type from the **Document Type for Composed Documents** drop-down list. This is the Document Type where documents generated with this template are saved. If you do not select a Document Type, it is incumbent on the user to select the appropriate Document Type for generated documents upon executing certain ROI actions.
- Select the **Inherit Keywords from source document when possible** option. If you do not select this option, it is incumbent on the user to enter the appropriate Keyword Values for generated documents upon executing certain ROI actions.
- Select the **Disable the Import Dialog** option. To enable this option, you must first select a Document Type from the **Document Type for Composed Documents** drop-down list and select the **Inherit Keywords from source document when possible** option. By selecting the **Disable the Import Dialog** option, the user can perform ROI actions without also having to manually upload documents generated by those actions.
- If you select the **Always show Preview before archiving** option, you should also select the **Manually Edit the Document Preview** security option for User Groups assigned to the template. This allows users to make any necessary changes before printing.

Note: Recycle the application pool after selecting or deselecting the **Always show Preview before archiving** option and saving the template. This step resolves potential issues that can arise when attempting to print a document generated using the template.

When the **Always show Preview before archiving** option is selected, the user is forced to print a configured rejection letter to successfully reject the request.

11. Save the template.

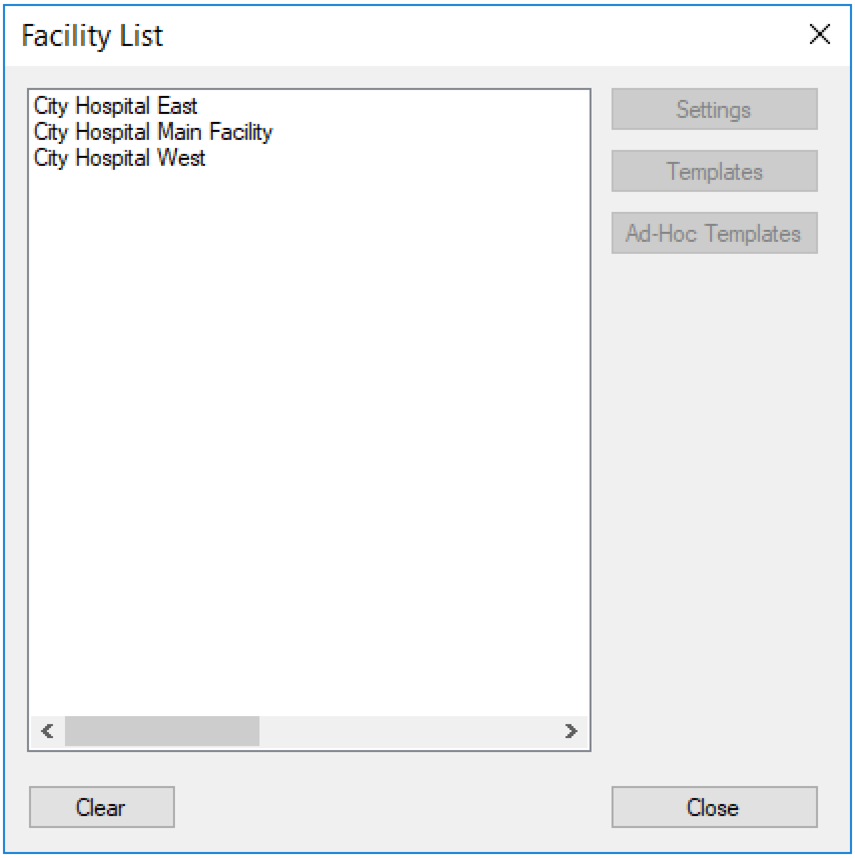
The template can now be assigned to a facility within the Configuration module. For more information on assigning templates to a facility, see Specifying Templates for a Facility on page 200.

Configuring ROI Facility Settings

You are able to configure certain facility-level settings that affect how an ROI request is processed.

To configure facility settings:

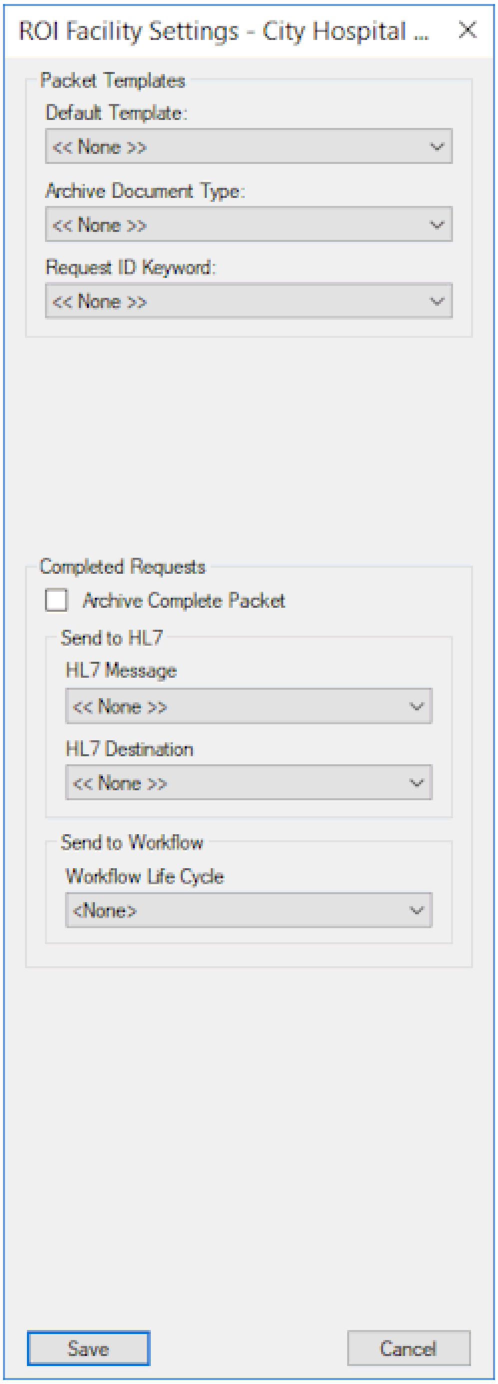
1. Click **Medical | Release of Information | Facility Settings**. The **Facility List** dialog box is displayed.



2. Select a medical facility from the list.

Note: Medical facilities are not created in this context. For more information on creating medical facilities, see the **Medical Records Unity Client** module reference guide.

3. Click **Settings**. The **ROI Facility Settings** dialog box is displayed.



4. In the **Packet Templates** section, select from the following settings to determine the default template and the request archival settings:

Packet Templates Option	Description
Default Template	The template used to generate the PDF packets for this facility.
Archive Document Type	The Document Type used to store the generated PDF packets for this facility.
Request ID Keyword	The Keyword Type used to archive the unique, system-generated request number of requests associated with this facility.

5. In the **Completed Requests** section, select from the following settings to determine what actions should take place when a request is completed.

Completed Requests Option	Description
Archive Complete Packet	Select if OnBase should archive the whole request packet, including all attached documents and any system-generated documents that should be released with the request, as a single document. If this setting is not selected, only the packet containing attached documents is archived into OnBase. System-generated documents may include a cover sheet and inventory pages. Regardless of whether **Archive Complete Packet** is selected, these documents are included with the packet when the user selects to print the request or save it to file.
HL7 Message	Select an HL7 message template to generate an HL7 message upon completion of the request. **Note:** HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.
HL7 Destination	Select an HL7 export destination to determine where the completed request and HL7 message are delivered.
Workflow Life Cycle	Select a Workflow Life Cycle the archived request packet should enter. If a request results in the archival of multiple packets, all associated packets are sent to this Life Cycle.

6. Click **Save**.

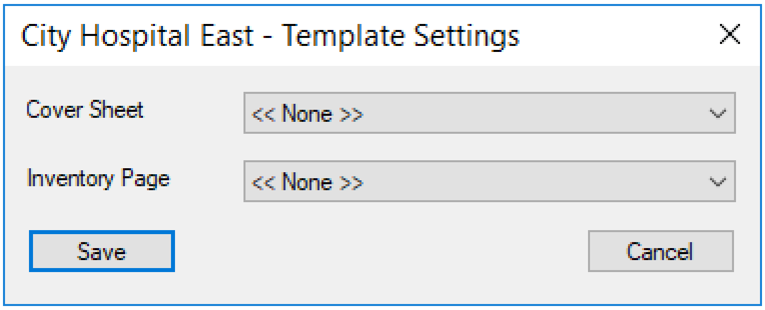
Specifying Templates for a Facility

For each facility used in ROI, you are able to specify templates for a cover sheet and inventory page. When using ROI, the cover sheet and inventory page are generated and released with the rest of the requested information.

Note: Before assigning templates to a facility, you must first create the appropriate templates using Document Composition in Microsoft Word. For more information on creating ROI templates, see Configuring ROI Templates on page 194.

To specify templates for a facility:

1. From the **Facility List** dialog box, select a facility.
2. Click the **Templates** button. The **Template Settings** dialog box is displayed.



3. Select the appropriate template for **Cover Sheet** and **Inventory Page**. All system templates are available from each drop-down list.
4. Click **Save** to assign the selected templates to the facility.

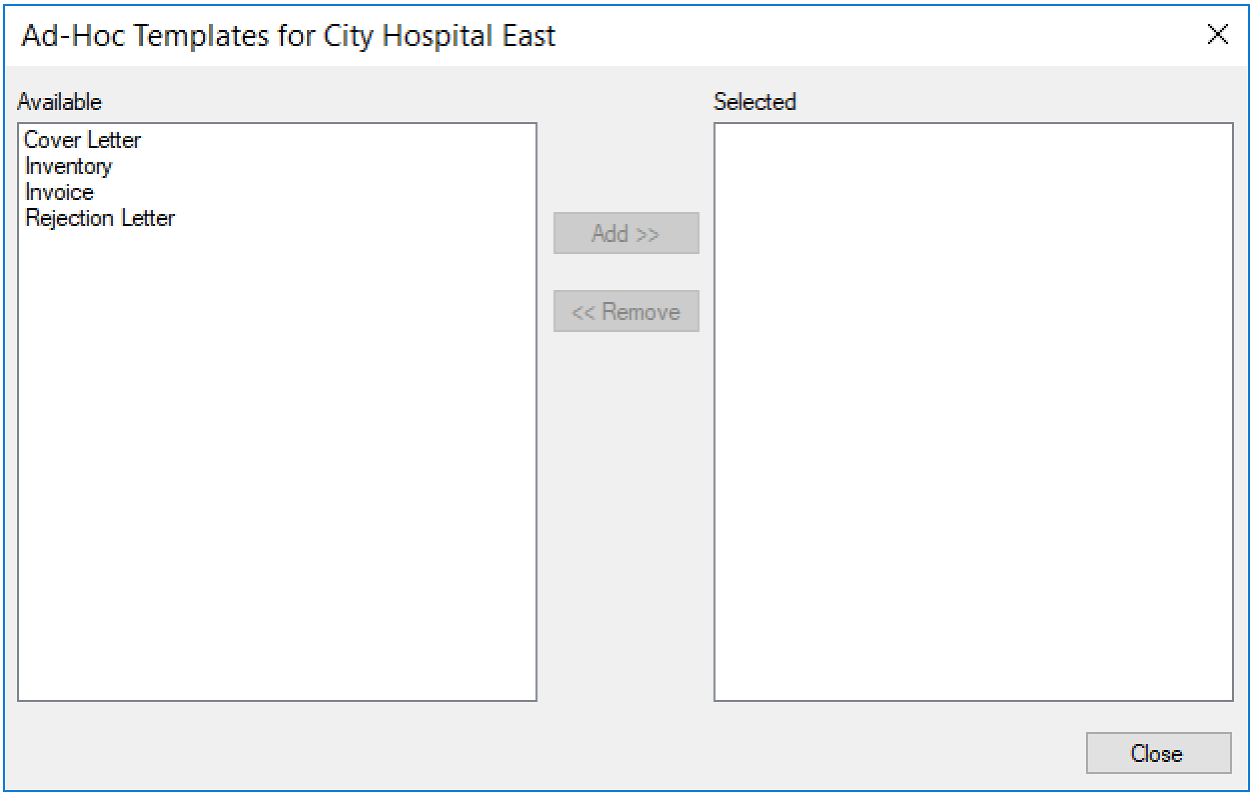
Assigning Available Ad Hoc Templates to a Facility

For each facility in ROI, you can assign ad hoc templates. Unlike templates specified for the ROI process, documents generated from ad hoc templates are not contingent on any executed action and are not included in request packets. They can be generated and printed from any request that is in progress.

Note: To print composed documents, users must have the **Create** and **Print** privilege for the Document Types assigned to the associated templates.

To assign available ad hoc templates to a facility:

1. From the **Facility List** dialog box, select a facility.
2. Click the **Ad-Hoc Templates** button. The **Ad-Hoc Templates** dialog box is displayed.



3. To assign templates to the facility, select them from the **Available** list and click **Add**. All system templates are available for selecting.

   To remove templates from the facility, select them from the **Selected** list and click **Remove**.
4. Click **Close** to save your changes.

Running the Packet Generation Service

The ROI Packet Generation service is a Windows service that listens for and generates new request packets after users either finalize or approve requests. The service does not need to be running when a packet becomes ready for generation, but it must be running to in order generate the PDF packet so that the request can move forward.

Note: If you make a change in OnBase Configuration, the service will not respect the change until it is restarted.

Tip: It is considered a best practice to run the ROI Packet Generation service at all times. Packets are generated in the order they become ready for generation. Multiple instances of the ROI Packet Generation service can run concurrently, allowing the deployment to be scaled out as needed.

Verifying the Service Is Running

The ROI Packet Generation service runs on a server dedicated to packet generation.

To verify the service is running:

1. Open the Windows Services console (**services.msc**).
2. Locate the ROI Packet Generation service.
3. Verify the status is **Running**.

Monitoring the Service

To monitor for errors related to packet generation, use the Diagnostics Console. If a packet fails to generate due to an issue with the packet or your configuration, an error is logged to the **Errors** tab.

The Unity Management Console allows you to view the execution status and history of the ROI Packet Generation service.

To check the service execution status:

1. Open the Unity Management Console.
2. Connect to the task scheduler designated for packet generation.
3. Navigate to the task group created for packet generation.
4. Select the **Generate ROI Unity Packets** task from the tasks pane.
5. Expand the **Details** pane to view the task schedule, status, and history. The **History** tab is especially useful for viewing the number of packets generated each time the task is executed.

   For information about statuses and other values displayed in the **Details** pane, see the **Unity Scheduler** module reference guide.

Auditing ROI Requests

For administrative purposes, you can audit ROI request actions by creating a Transaction Log Report in the OnBase Client.

To audit requests, from the OnBase Client, do one of the following:

- To view all ROI actions, select **Admin | Transaction Logs | View All Messages | Release of Information Log**. You are prompted that running an unrestricted query may take a long time. Click **Yes** to continue.
- To only view certain ROI actions, select **Admin | Transaction Logs | Create Report**. From the **Transaction Log** drop-down list, select **Release of Information**.

Note: For more information on creating and viewing Transaction Log Reports, see the System Administration module reference guide.

The Transaction Log records the following actions for ROI requests:

- Viewing requests
- Adding documents to requests
- Removing documents from requests
- Creating requests
- Printing requests
- Creating, failing, and stopping batches (external document retrieval)
- Assigning and unassigning requests
- Submitting (finalizing) requests
- Canceling requests

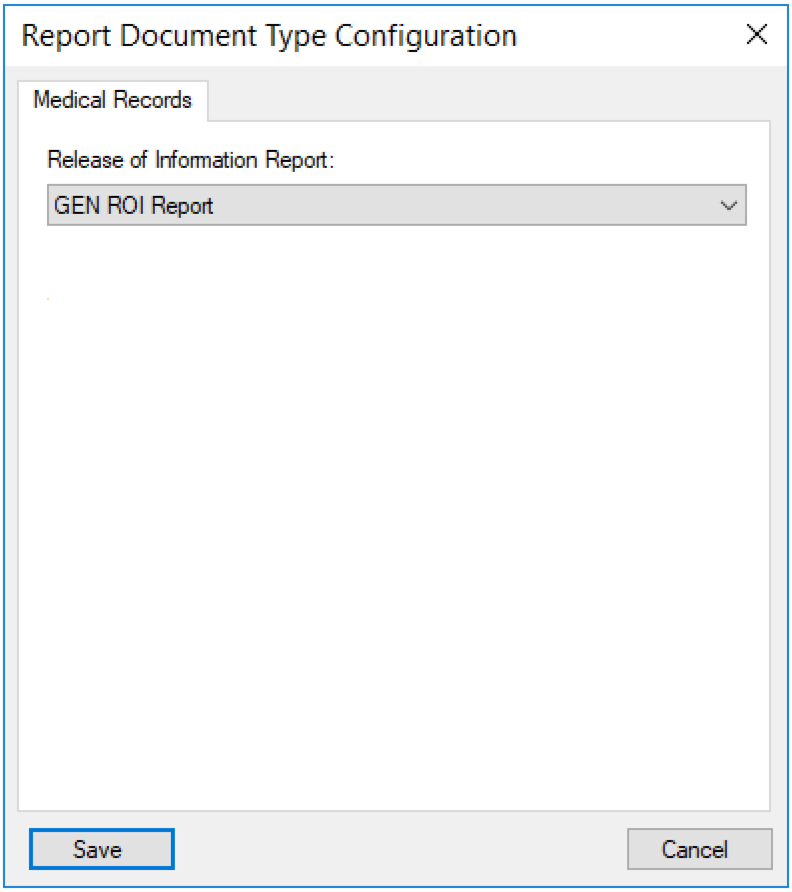
Configuring ROI Reports

Users with the **Productivity Reports** ROI privilege can run Release of Information reports from the OnBase Client. Before these reports can be generated, a Document Type must be designated for storing the reports.

To designate a Document Type for Release of Information reports:

1. Using the Configuration module, create a Document Type for Release of Information reports.
2. After creating the Document Type, select **Medical | Report Document Types**. The **Report Document Type Configuration** dialog box is displayed.

3. From the **Release of Information Report** drop-down list, select the Document Type you created for Release of Information reports.



4. Click **Save** when finished.

Note: By default, the User Productivity and Released Requests reports include weekends and holidays in the total processing time for each request. You can configure OnBase to exclude weekends and holidays using a Business Calendar. See Creating a Business Calendar on page 188.

Creating Workflow Authorization Forms

If OnBase is licensed for Workflow, you can configure authorization forms that trigger the creation of an ROI request when a form is created. See the following topics:

- Form Keyword Types on page 205
- ROI Workflow Action on page 207

Form Keyword Types

Authorization forms must be assigned the Keyword Types necessary for request creation. See the following topics:

- Required Keyword Types for Authorization Forms on page 205
- Optional Keyword Types for Authorization Forms on page 206

Required Keyword Types for Authorization Forms

Authorization forms must include Keyword Types for each of the following items:

Required Keyword Type	Purpose
Request ID	Links the authorization form to the ROI request. This field is automatically populated when the **Create Release of Information Request** Workflow action is executed on the document. ROI users can view the authorization form from the associated ROI request. **Note:** Configure the **Request ID** Keyword Type as read-only on the Document Type for the form. For more information on Keyword options, see the **System Administration** module reference guide or help file.
One of the following: • Facility ID # • Facility Name	Populates the **Facility** field in the **Request Information** section of the request form. This value is required to ensure the correct facility settings are applied to the request.

<table>
<tr><th>Required Keyword Type</th><th>Purpose</th></tr>
<tr><td>One of the following:
MPI
MRN
Chart ID #</td><td>Adds one or more patients to the request. These Keyword Types must be mapped to the corresponding Chart Data Fields in OnBase Configuration.
If the ROI Patient ID Method is set to MPI, the MPI is used to add the associated patient to the request.
If OnBase is configured to use Assigning Authorities to uniquely identify MPIs, then an MPI Assigning Authority Keyword Value must also be provided.
Regardless of the Patient ID Method, the MRN can be used to add the associated patient to the request and to automatically select the associated record in the Add Attachments wizard.
If OnBase is configured to use Assigning Authorities to uniquely identify MRNs, then an MRN Assigning Authority Keyword Value must also be provided.
The Chart ID # is used to add the associated patient and automatically select the associated chart in the Add Attachments wizard.
If OnBase is configured to use Assigning Authorities to uniquely identify charts, then a chart Assigning Authority Keyword Value must also be provided.
Even when a patient is added to the request, the ROI user still must use the Add Attachments wizard to add documents to the request.</td></tr>
</table>

Optional Keyword Types for Authorization Forms

Optionally, authorization forms can include Keyword Types for the following items:

Optional Keyword Type	Purpose
Reason for Request	Populates the **Reason for Request** field of the request form if mapped to the **Reason** setting on the Workflow action.
Request Due Date	Populates the **Request Due Date** field of the request form if mapped to the **Request Due Date** setting on the Workflow action.
Admit Date	Populates the **Date(s) of Service** filter in the **Add Attachments** wizard if mapped to the **From** setting on the Workflow action.
Discharge Date	Populates the **Date(s) of Service** filter in the **Add Attachments** wizard if mapped to the **To** setting on the Workflow action.

ROI Workflow Action

After you configure an authorization form, you can map the associated Keyword Types to the corresponding fields of the **Create Release of Information Request** Workflow action. For more information, see Workflow on page 207.

System Interaction

Report Capture for Meditech

If your solution is licensed for Report Capture for Meditech, then OnBase Release of Information can be used to import and attach external system (e.g., Meditech) documents to be released in a request. For more information, see the section on ROI and Report Capture for Meditech in the Usage chapter.

Virtual Print Driver

If your solution is licensed for Virtual Print Driver, then OnBase Release of Information can attach documents printed and uploaded using the Virtual Print Driver to a request. For more information, see the section on ROI and the Virtual Print Driver in the Usage chapter.

Workflow

If your solution is licensed for Workflow, then the ROI request creation process can be automated by the **Create Release of Information Request** Workflow action. When a user creates an ROI authorization form, the document's Keyword Values are populated into a new request. To view a document that prompted the creation of a certain request, click the **Authorization Form** button from the **Release of Information** tab in any applicable request.

Note: The **Authorization Form** button is only available from requests created using the **Create Release of Information** action.

Create Release of Information Request Action

Creates an ROI request using Keyword Values from a newly created document. Map Keyword Types to the appropriate items so that the entered values are used in a request.

Note: This action is supported only in the Core-based OnBase Client, Web Client, and Unity interfaces.

Note: If you select a Keyword Type that does not exist on the Document Type, a warning is displayed within the associated Keyword Type drop-down list.

Request Information Tab

Keyword Types can be assigned to the following items in the **Request Information** tab:

- Request ID (required)
- Facility (one is required)
    - Facility ID
    - Facility Name
- Reason
- Request Due Date

Patient Information Tab

Keyword Types can be assigned to the following items to add patients or charts to the request. An ROI user still must use the **Add Attachments** wizard to add documents to the request.

- Patient ID
- Patient Name (These settings are available for incremental upgrade purposes only. They are not used with the current version of the Release of Information module.)
    - Full Name
    - Last Name
    - First Name
- Date of Birth (This setting is available for incremental upgrade purposes only. It is not used with the current version of the Release of Information module.)
- Date(s) of Service
    - From
    - To

Requester Information Tab

Note: If you are using Release of Information in Integrated Mode, items on this tab are not applicable.

Keyword Types can be assigned to the following items to populate the corresponding Requester Information and Shipping Address fields on the request form:

- Name
- Phone
- Shipping Address
    - Line 1
    - Line 2
    - City
    - State/Province
    - ZIP/Postal Code
    - Country

XML Schema for Template Creation - Standard Mode

When creating templates for ROI cover sheets, inventory pages, bills, and rejection letters, you must use XML Path placeholders within Document Composition. The tables below lists all possible XML paths that can be placed in an XML Path placeholder.

To pull values from the request into a document, enter the appropriate XML path into the **XPath** field when configuring placeholders in Document Composition. Depending on the contents of a request, some of the elements listed below may be able to return more than one value. In this instance, use the appropriate path of the parent element to display all of the results.

Note: For more information on configuring XML placeholders, see Creating Placeholders on page 257.

General Request Information

The following XML paths display general information about a request, such as the Request ID and the Request Type.

XML Path	Displays
//ROIRequest/ID	The unique identification number of the request.
//ROIRequest/Type	The Request Type of the request.
//ROIRequest/RequestDate	The actual date the request was created in the system.
//ROIRequest/SubmittedDate	The Request Date, as entered on the request form.
//ROIRequest/DueDate	The date the ROI request is due by, as entered on the request form.
//ROIRequest/DocumentCount	The number of documents included in the packet. For batch templates, this value is specific to each packet generated for the request. Batch templates are used only when the **Separate by Chart** option is selected on the request and Release of Information is in standard mode.

XML Path	Displays
//ROIRequest/TotalPageCount	The total number of pages included in the packet, excluding inventory pages or cover sheets. • If this placeholder is used on a batch template and the **Separate by Chart** option is selected on the request, then the total page count value is specific to each packet generated for the request. The count does not include the **Additional Pages** value entered on the request form. • If **Separate by Chart** is not selected, then only one packet is generated for the request, and the total page count value includes the **Additional Pages** value entered on the request.
//ROIRequest/ExternalItemCount	The number of external items attached to the request.
//ROIRequest/RejectReason	The user-entered description of why a request was rejected.
//ROIRequest/RejectReasonName	The Rejection Reason assigned to a request that was rejected by a user.
//ROIRequest/Reason	The user-entered description of why a request was requested.
//ROIRequest/ReferenceNumber	The Ref Number, as entered on the request form.

Facility Information

The following XML paths display information about the facility contacted in a request

XML Path	Displays
//ROIRequest/Facility/Name	The name of the facility.
//ROIRequest/Facility/PhoneNumber	The phone number of the facility.
//ROIRequest/Facility/FaxNumber	The fax number of the facility.
//ROIRequest/Facility/Address/Address1	The first line of the facility address.
//ROIRequest/Facility/Address/Address2	The second line of the facility address.
//ROIRequest/Facility/Address/City	The city the facility is located in.
//ROIRequest/Facility/Address/State	The state the facility is located in.

XML Path	Displays
//ROIRequest/Facility/Address/ZipCode	The zip code the facility is located in.

Requester Information

The following XML paths display information about the requester of a request.

XML Path	Displays
//ROIRequest/Requester/Name	The name of the requester.
//ROIRequest/Requester/Relationship	The relationship of the requester to the patient.
//ROIRequest/Requester/Email	The e-mail address of the requester.
//ROIRequest/Requester/CompanyName	The company name of the requester.
//ROIRequest/Requester/ShippingAddress/Address1	The first line of the requester shipping address.
//ROIRequest/Requester/ShippingAddress/Address2	The second line of the requester shipping address.
//ROIRequest/Requester/ShippingAddress/City	The city of the requester shipping address.
//ROIRequest/Requester/ShippingAddress/State	The state of the requester shipping address.
//ROIRequest/Requester/ShippingAddress/Country	The country of the requester shipping address.
//ROIRequest/Requester/ShippingAddress/ZipCode	The zip code of the requester shipping address.
//ROIRequest/Requester/BillingAddress/Address1	The first line of the requester billing address.
//ROIRequest/Requester/BillingAddress/Address2	The second line of the requester billing address.
//ROIRequest/Requester/BillingAddress/City	The city of the requester billing address.
//ROIRequest/Requester/BillingAddress/State	The state of the requester billing address.

XML Path	Displays
//ROIRequest/Requester/Billing Address/Country	The country of the requester billing address.
//ROIRequest/Requester/ BillingAddress/ZipCode	The zip code of the requester billing address.

Invoice Information

The following XML paths display information about the invoice of a request.

When using the **Item** element parent path as a placeholder and you select to insert the results as a list, all of the element's child elements are automatically displayed in the generated document.

When using the **Item** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, if you only want **Name**, **Count**, and **Total** values displayed in the generated document, you would enter **Name,Count,Total** in the **Column Names** field.

XML Path	Displays
//ROIRequest/Invoice/PageCount	The number of pages attached to the request as a result of adding documents with the wizard, Virtual Print Driver, and/or Report Capture.
//ROIRequest/Invoice/ AdditionalPageCount	The number of pages attached to the request as a result of entering a page count in the Additional Pages field of the request and adding documents using Custom Queries.
//ROIRequest/Invoice/Cost	The cost of the request before any adjustment. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/ CostAdjustment	The manually entered cost adjustment of the request. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.

XML Path	Displays
//ROIRequest/Invoice/SubTotal	The total cost of the request after the manually entered cost adjustment has been applied. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/ExternalItemCount	The number of external items attached to the request.
//ROIRequest/Invoice/ExternalItemTotal	The cost of all external items attached to the request. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/GrandTotal	The total cost of the request after adjustments, tax, and shipping fee have been applied. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/Tax	The tax applied to the subtotal of the request. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/ShipCost	The shipping and handling fee applied to the request. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/AmountPaid	The amount paid by the requester. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.

XML Path	Displays
//ROIRequest/Invoice/AmountDue	The remaining balance due from the requester. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/PaymentMethod	The method of payment used by the requester.
//ROIRequest/Invoice/PaymentDescription	The manually entered description of the payment (e.g., notes about the payment).
//ROIRequest/Invoice/Items/Item	Use this parent element path to display more than one item in the generated document. When configuring a placeholder for this path, insert the results as either a list or table.
//ROIRequest/Invoice/Items/Item/Name	The name of a pricing policy rule or external item on the request.
//ROIRequest/Invoice/Items/Item/Cost	The cost of a pricing policy rule or external item on the request. **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/Items/Item/Count	The page range of a pricing policy rule or quantity of an external item on a request.
//ROIRequest/Invoice/Items/Item/Total	The total cost of a pricing policy rule or external item on a request (i.e., the cost multiplied by the count). **Note:** Currency values on generated documents are displayed according to workstation locale. When configuring display style for currency placeholders, make sure **None** is selected.
//ROIRequest/Invoice/Items/Item/IsExternal	Specifies whether a particular item is an external item. A **Yes** or **No** is displayed.
//ROIRequest/Invoice/OriginalInvoiceDate	The date the invoice was originally sent for the request.

XML Path	Displays
//ROIRequest/Invoice/Is30DaysOld	A value of **true** indicates between 30 and 59 days have lapsed since the invoice was originally sent to the requester, and that full payment for the request has not been received. A value of **false** indicates the invoice has been paid or is not between 30 and 59 days old.
//ROIRequest/Invoice/Is60DaysOld	A value of **true** indicates between 60 and 89 days have passed since the invoice was originally sent to the requester, and that full payment for the request has not been received. A value of **false** indicates the invoice has been paid or is not between 60 and 89 days old.
//ROIRequest/Invoice/Is90DaysOld	A value of **true** indicates between 90 and 119 days have passed since the invoice was originally sent to the requester, and that full payment for the request has not been received. A value of **false** indicates the invoice has been paid or is not between 60 and 119 days old.
//ROIRequest/Invoice/Is120DaysOld	A value of **true** indicates 120 or more days have passed since the invoice was originally sent to the requester, and that full payment for the request has not been received. A value of **false** indicates the invoice has been paid or is not 120 or more days old.

Inventory Information

The XML paths in the following sections display information about Master Patient Indexes, Medical Record Numbers, charts, and documents included in a packet.

- Master Patient Index Information on page 215
- Medical Record Number Information on page 217
- Chart Information on page 218
- Document Information on page 219

Master Patient Index Information

The following XML paths display patient information related to the Master Patient Index (MPI) numbers included in a packet.

When using the **MasterPatientIndex** element parent path as a placeholder and you select to insert the results as a list, all of element’s child elements are displayed in the generated document.

When using the **MasterPatientIndex** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **MasterPatientIndex** root path, and you only want **PatientLastName** and **PatientFirstName** values displayed in the generated document, you would enter **PatientLastName,PatientFirstName** in the **Column Names** field.

XML Path	Display
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex	Use this parent element path to display more than one MPI in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **PatientFirstName**, **PatientMiddleName**, **PatientLastName**, **DOB**, **SSN**, **Gender**, **SpecialInstructions**, and **DeceasedDate**.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/MPI	The MPI number from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientFirstName	The patient first name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientMiddleName	The patient middle name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientLastName	The patient last name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/DOB	The patient date of birth from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/SSN	The patient Social Security number from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/Gender	The patient gender from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/SpecialInstructions	The patient special instructions from an attached MPI.

XML Path	Display
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/DeceasedDate	The patient deceased date from an attached MPI.

Medical Record Number Information

The following XML paths display patient information related to the Medical Record Numbers (MRNs) included in a packet.

When using the **MedicalRecord** element parent path as a placeholder and you select to insert the results as a list, all of element's child elements are displayed in the generated document.

When using the **MedicalRecord** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **MedicalRecord** root path, and you only want **PatientLastName** and **PatientFirstName** values displayed in the generated document, you would enter **PatientLastName,PatientFirstName** in the **Column Names** field.

XML Path	Display
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord	Use this parent element path to display more than one MRN in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **MRN**, **PatientFirstName, PatientMiddleName**, **PatientLastName**, **DOB**, **Birthplace, SSN**, **Gender**, **HomePhoneNumber**, **WorkPhoneNumber**, and **CellPhoneNumber**.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/MPI	The patient MPI number associated with an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/MRN	The patient MRN from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientFirstName	The patient first name from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientMiddleName	The patient middle name from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientLastName	The patient last name from an attached MRN.

XML Path	Display
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Address1	The first line of the address (Address 1) from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Address2	The second line of the address (Address 2) from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/City	The city from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/State	The state from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/ZipCode	The ZIP code from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/DOB	The patient date of birth from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Birthplace	The patient birthplace from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/SSN	The patient Social Security Number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Gender	The patient gender from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/HomePhoneNumber	The home phone number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/WorkPhoneNumber	The work phone number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/CellPhoneNumber	The cell phone number from an attached MRN.

Chart Information

The following XML paths display information about charts and documents included in a packet.

When using the **Chart** element parent path as a placeholder and you select to insert the results as a list, all of element’s child elements are displayed in the generated document.

When using the **Chart** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **Chart** root path, and you only want **Name** and **Type** values displayed in the generated document, you would enter **Name,Type** in the **Column Names** field.

XML Path	Displays
//ROIRequest/Inventory/Charts/Chart	Use this parent element path to display more than one chart in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **AccountNumber**, **Name**, **MRN**, **MPI**, **PatientFirstName**, **PatientLastName**, **AdmitDate**, and **DischargeDate**.
//ROIRequest/Inventory/Charts/Chart/AccountNumber	The account number associated with a particular chart.
//ROIRequest/Inventory/Charts/Chart/Name	The chart title on a particular chart.
//ROIRequest/Inventory/Charts/Chart/PatientFirstName	The patient first name on a chart.
//ROIRequest/Inventory/Charts/Chart/PatientLastName	The patient last name on a chart.
//ROIRequest/Inventory/Charts/Chart/AdmitDate	The patient admit date on a chart.
//ROIRequest/Inventory/Charts/Chart/DischargeDate	The patient discharge date on a chart.
//ROIRequest/Inventory/Charts/Chart/MRN	The patient MRN on a particular chart.
//ROIRequest/Inventory/Charts/Chart/MPI	The patient MPI on a particular chart.

Document Information

The following XML paths display information about documents included in a packet.

When using the **Document** element parent path as a placeholder and you select to insert the results as a list, all of element’s child elements are displayed in the generated document.

When using the **Document** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **Document** root path, and you only want **Name** and **Type** values displayed in the generated document, you would enter **Name,Type** in the **Column Names** field.

XML Path	Displays
//ROIRequest/Inventory/Documents/Document	Use this parent element path to display more than one document in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **MRN**, **AccountNumber**, **Name**, **Type**, and **PageCount**.
//ROIRequest/Inventory/Documents/Document/Name	The name of a particular document.
//ROIRequest/Inventory/Documents/Document/Type	The Document Type of a particular document.
//ROIRequest/Inventory/Documents/Document/PageCount	The number of pages included in a particular document.
//ROIRequest/Inventory/Documents/Document/AccountNumber	The account number associated with a particular document.
//ROIRequest/Inventory/Documents/Document/MRN	The patient MRN on a particular document.
//ROIRequest/Inventory/Documents/Document/MPI	The patient MPI on a particular document.

XML Schema for Template Creation - Integrated Mode

When creating templates for ROI cover sheets or inventory pages, you must use XML Path placeholders within Document Composition. The tables below lists all possible XML paths that can be placed in an XML Path placeholder.

To pull values from the request into a document, enter the appropriate XML path into the **XPath** field when configuring placeholders in Document Composition. Depending on the contents of a request, some of the elements listed below may be able to return more than one value. In this instance, use the appropriate path of the parent element to display all of the results.

Note: For more information on configuring XML placeholders, see Creating Placeholders on page 257.

General Request Information

The following XML paths display general information about a request, such as the Request ID and the Request Type.

XML Path	Displays
//ROIRequest/ID	The unique identification number of the request.
//ROIRequest/Type	The Request Type of the request.
//ROIRequest/RequestDate	The actual date the request was created in the system.
//ROIRequest/DocumentCount	The number of documents attached to the request.
//ROIRequest/TotalPageCount	The total number of pages being released with the request. This does not include inventory pages or cover sheets.
//ROIRequest/ReferenceNumber	The Ref Number, as entered on the request form.

Facility Information

The following XML paths display information about the facility contacted in a request

XML Path	Displays
//ROIRequest/Facility/Name	The name of the facility.

XML Path	Displays
//ROIRequest/Facility/PhoneNumber	The phone number of the facility.
//ROIRequest/Facility/FaxNumber	The fax number of the facility.
//ROIRequest/Facility/Address/Address1	The first line of the facility address.
//ROIRequest/Facility/Address/Address2	The second line of the facility address.
//ROIRequest/Facility/Address/City	The city the facility is located in.
//ROIRequest/Facility/Address/State	The state the facility is located in.
//ROIRequest/Facility/Address/ZipCode	The zip code the facility is located in.

Inventory Information

The XML paths in the following sections display information about Master Patient Indexes, Medical Record Numbers, charts, and documents included in a packet.

- Master Patient Index Information on page 222
- Medical Record Number Information on page 224
- Chart Information on page 225
- Document Information on page 226

Master Patient Index Information

The following XML paths display patient information related to the Master Patient Index (MPI) numbers included in a packet.

When using the **MasterPatientIndex** element parent path as a placeholder and you select to insert the results as a list, all of element’s child elements are displayed in the generated document.

When using the **MasterPatientIndex** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **MasterPatientIndex** root path, and you only want **PatientLastName** and **PatientFirstName** values displayed in the generated document, you would enter **PatientLastName,PatientFirstName** in the **Column Names** field.

XML Path	Display
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex	Use this parent element path to display more than one MPI in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **PatientFirstName**, **PatientMiddleName**, **PatientLastName**, **DOB**, **SSN**, **Gender**, **SpecialInstructions**, and **DeceasedDate**.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/MPI	The MPI number from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientFirstName	The patient first name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientMiddleName	The patient middle name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/PatientLastName	The patient last name from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/DOB	The patient date of birth from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/SSN	The patient Social Security number from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/Gender	The patient gender from an attached MPI.
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/SpecialInstructions	The patient special instructions from an attached MPI.

XML Path	Display
//ROIRequest/Inventory/ MasterPatientIndexes/ MasterPatientIndex/DeceasedDate	The patient deceased date from an attached MPI.

Medical Record Number Information

The following XML paths display patient information related to the Medical Record Numbers (MRNs) included in a packet.

When using the **MedicalRecord** element parent path as a placeholder and you select to insert the results as a list, all of element's child elements are displayed in the generated document.

When using the **MedicalRecord** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **MedicalRecord** root path, and you only want **PatientLastName** and **PatientFirstName** values displayed in the generated document, you would enter **PatientLastName,PatientFirstName** in the **Column Names** field.

XML Path	Display
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord	Use this parent element path to display more than one MRN in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **MRN**, **PatientFirstName, PatientMiddleName**, **PatientLastName**, **DOB**, **Birthplace, SSN**, **Gender**, **HomePhoneNumber**, **WorkPhoneNumber**, and **CellPhoneNumber**.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/MPI	The patient MPI number associated with an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/MRN	The patient MRN from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientFirstName	The patient first name from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientMiddleName	The patient middle name from an attached MRN.
//ROIRequest/Inventory/ MedicalRecords/MedicalRecord/ PatientLastName	The patient last name from an attached MRN.

XML Path	Display
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Address1	The first line of the address (Address 1) from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Address2	The second line of the address (Address 2) from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/City	The city from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/State	The state from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/ZipCode	The ZIP code from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/DOB	The patient date of birth from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Birthplace	The patient birthplace from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/SSN	The patient Social Security Number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/Gender	The patient gender from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/HomePhoneNumber	The home phone number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/WorkPhoneNumber	The work phone number from an attached MRN.
//ROIRequest/Inventory/MedicalRecords/MedicalRecord/CellPhoneNumber	The cell phone number from an attached MRN.

Chart Information

The following XML paths display information about charts and documents included in a packet.

When using the **Chart** element parent path as a placeholder and you select to insert the results as a list, all of element's child elements are displayed in the generated document.

When using the **Chart** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **Chart** root path, and you only want **Name** and **Type** values displayed in the generated document, you would enter **Name,Type** in the **Column Names** field.

XML Path	Displays
//ROIRequest/Inventory/Charts/ Chart	Use this parent element path to display more than one chart in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **AccountNumber**, **Name**, **MRN**, **MPI**, **PatientFirstName**, **PatientLastName**, **AdmitDate**, and **DischargeDate**.
//ROIRequest/Inventory/Charts/ Chart/AccountNumber	The account number associated with a particular chart.
//ROIRequest/Inventory/Charts/ Chart/Name	The chart title on a particular chart.
//ROIRequest/Inventory/Charts/ Chart/PatientFirstName	The patient first name on a chart.
//ROIRequest/Inventory/Charts/ Chart/PatientLastName	The patient last name on a chart.
//ROIRequest/Inventory/Charts/ Chart/AdmitDate	The patient admit date on a chart.
//ROIRequest/Inventory/Charts/ Chart/DischargeDate	The patient discharge date on a chart.
//ROIRequest/Inventory/Charts/ Chart/MRN	The patient MRN on a particular chart.
//ROIRequest/Inventory/Charts/ Chart/MPI	The patient MPI on a particular chart.

Document Information

The following XML paths display information about documents included in a packet.

When using the **Document** element parent path as a placeholder and you select to insert the results as a list, all of element’s child elements are displayed in the generated document.

When using the **Document** parent path as a placeholder and you select to insert the results as a table, you must enter the child elements you want displayed as column names. For example, when configuring a placeholder using the **Document** root path, and you only want **Name** and **Type** values displayed in the generated document, you would enter **Name,Type** in the **Column Names** field.

XML Path	Displays
//ROIRequest/Inventory/Documents/ Document	Use this parent element path to display more than one document in the generated document. When configuring a placeholder for this path, insert the results as either a list or table. For a table, valid column names include **MPI**, **MRN**, **AccountNumber**, **Name**, **Type**, and **PageCount**.
//ROIRequest/Inventory/Documents/ Document/Name	The name of a particular document.
//ROIRequest/Inventory/Documents/ Document/Type	The Document Type of a particular document.
//ROIRequest/Inventory/Documents/ Document/PageCount	The number of pages included in a particular document.
//ROIRequest/Inventory/Documents/ Document/AccountNumber	The account number associated with a particular document.
//ROIRequest/Inventory/Documents/ Document/MRN	The patient MRN on a particular document.
//ROIRequest/Inventory/Documents/ Document/MPI	The patient MPI on a particular document.

Before You Begin

The information found in this appendix expands on the information found in Configuring ROI Templates on page 141, which provides a high-level overview of the processes necessary to configure ROI templates. The information below provides in-depth detail on some of the processes referenced in that section, as well as information on how to properly configure the Template Builder, which is used to create ROI templates.

Before using the Template Builder:

- Ensure that the proper User Group privileges are configured. See User Group Privileges on page 228 for more information.
- Deploy the Template Builder UNC or URL path provided to you. See Installing the Template Builder on page 229.
- If you want to allow tracking of changes to a template document, you must be licensed for the EDM Services module. The **SYS - Document Template** Document Type, where Release of Information templates are stored, must be configured as revisable. For more information about configuring revisable Document Types, see the EDM Services documentation.

Note: If the **SYS - Document Template** Document Type is not revisable, a new copy of the template will be saved to the **SYS - Document Template** Document Type each time a template is saved.

User Group Privileges

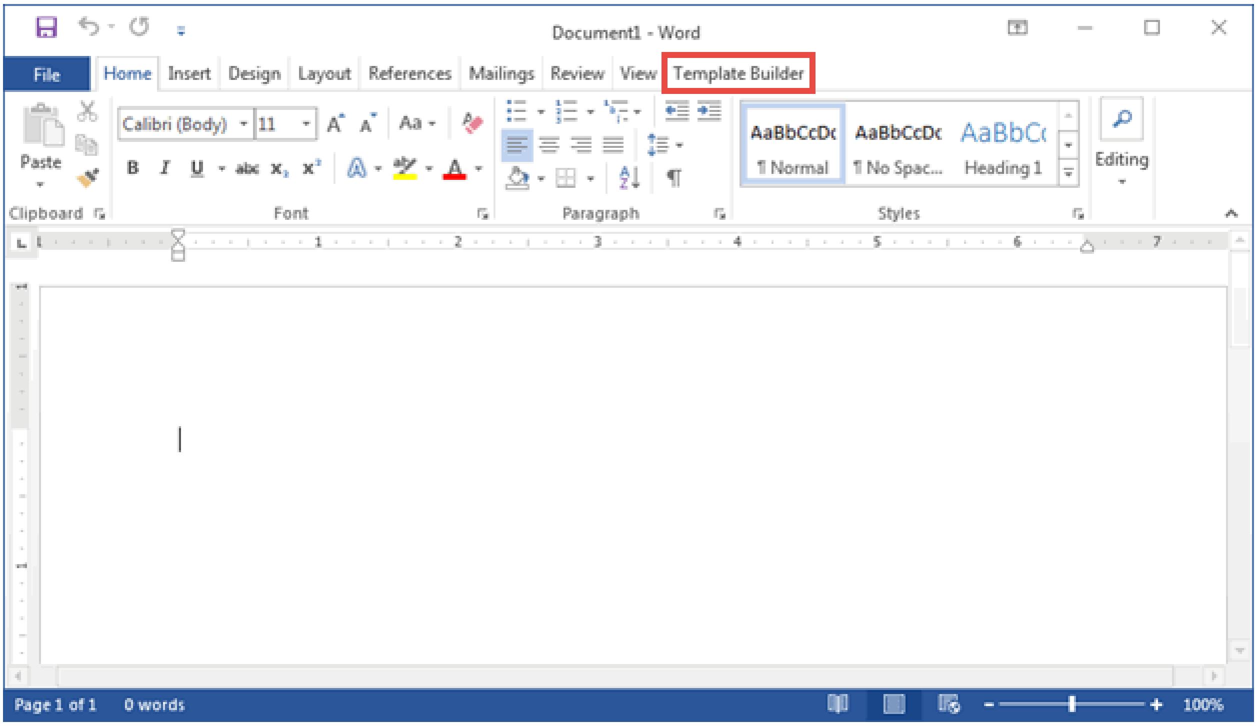
In order to configure templates, a user must belong to a User Group that has the **Document Composition Administration** privilege.

In order to create documents, a user must belong to a User Group that has the **Word Document Composition** privilege.

Both of these privileges are assigned in the Configuration module. Select **User | User Groups / Rights**. Choose the appropriate User Group and click **Privileges**.

Installing the Template Builder

The Template Builder, which is the Document Composition configuration component, is accessed from the **Template Builder** tab in Microsoft Word:



If the **Template Builder** tab is not available, the Template Builder is not installed. If you have been provided with a URL or UNC path, click the path to install the Template Builder by deploying the installation package to your workstation. When the installation is confirmed, click **Close**, and launch Microsoft Word to access the **Template Builder** tab.

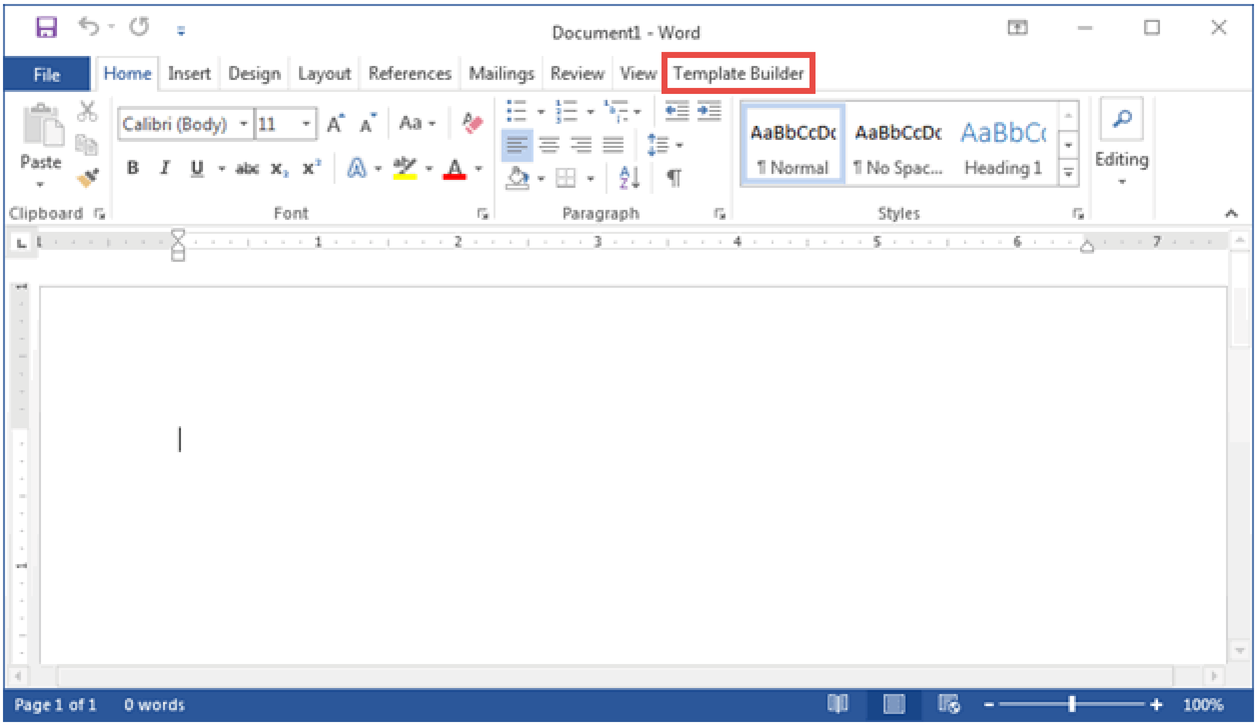
Note: When the installation package is modified by your system administrator, you are prompted to install a new version of the Template Builder after opening Microsoft Word.

If you have not been provided with a URL or UNC path, contact your system administrator.

Template Groups and Templates

Note: Before creating and configuring template groups and templates, ensure that you have reviewed the information in Before You Begin on page 228. To use, create, or modify a template, users must have rights to the template group and the template.

Template group and template creation and configuration is done in Microsoft Word, on the **Template Builder** tab:



See the following topics:

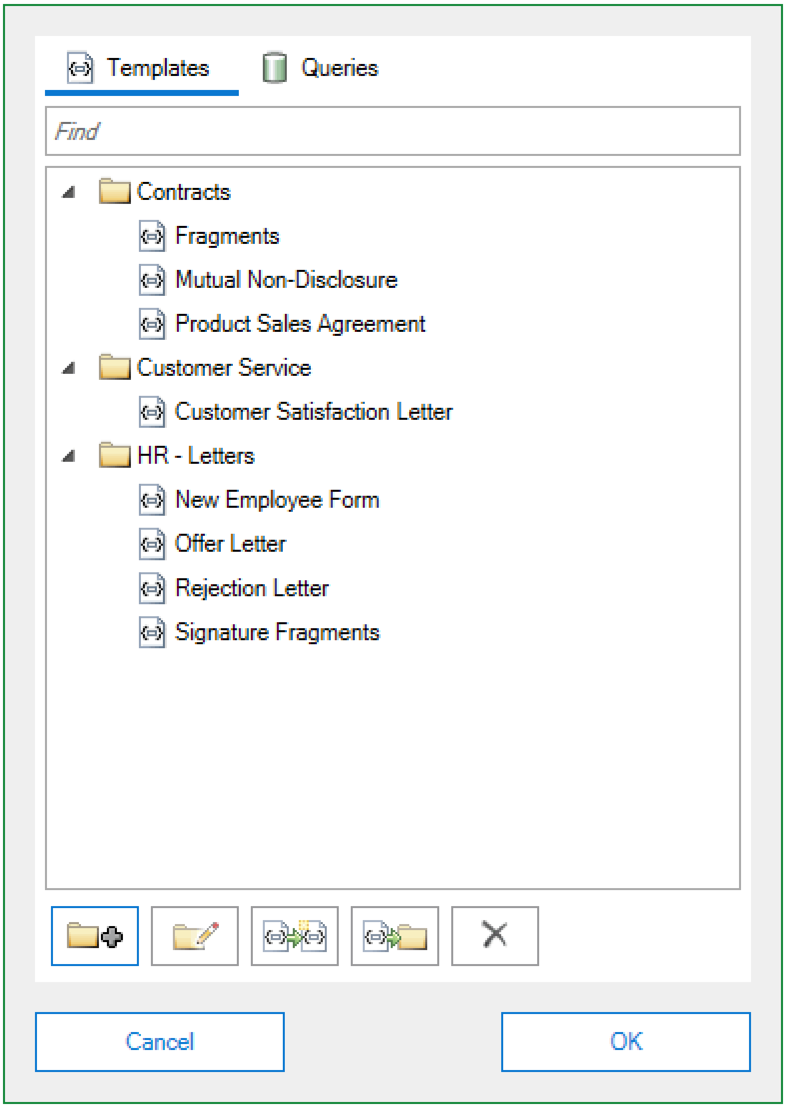
- Creating Template Groups on page 230
- Editing Template Groups on page 234
- Deleting Template Groups on page 235
- Creating Templates on page 236
- Viewing and Editing Templates on page 239
- Copying Templates on page 241
- Moving Templates on page 243
- Deleting Templates on page 245
- Configuring Template Options on page 246

Creating Template Groups

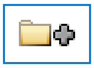
To create a new template group:

1. Click **Control Panel**.
2. If prompted, login to OnBase.

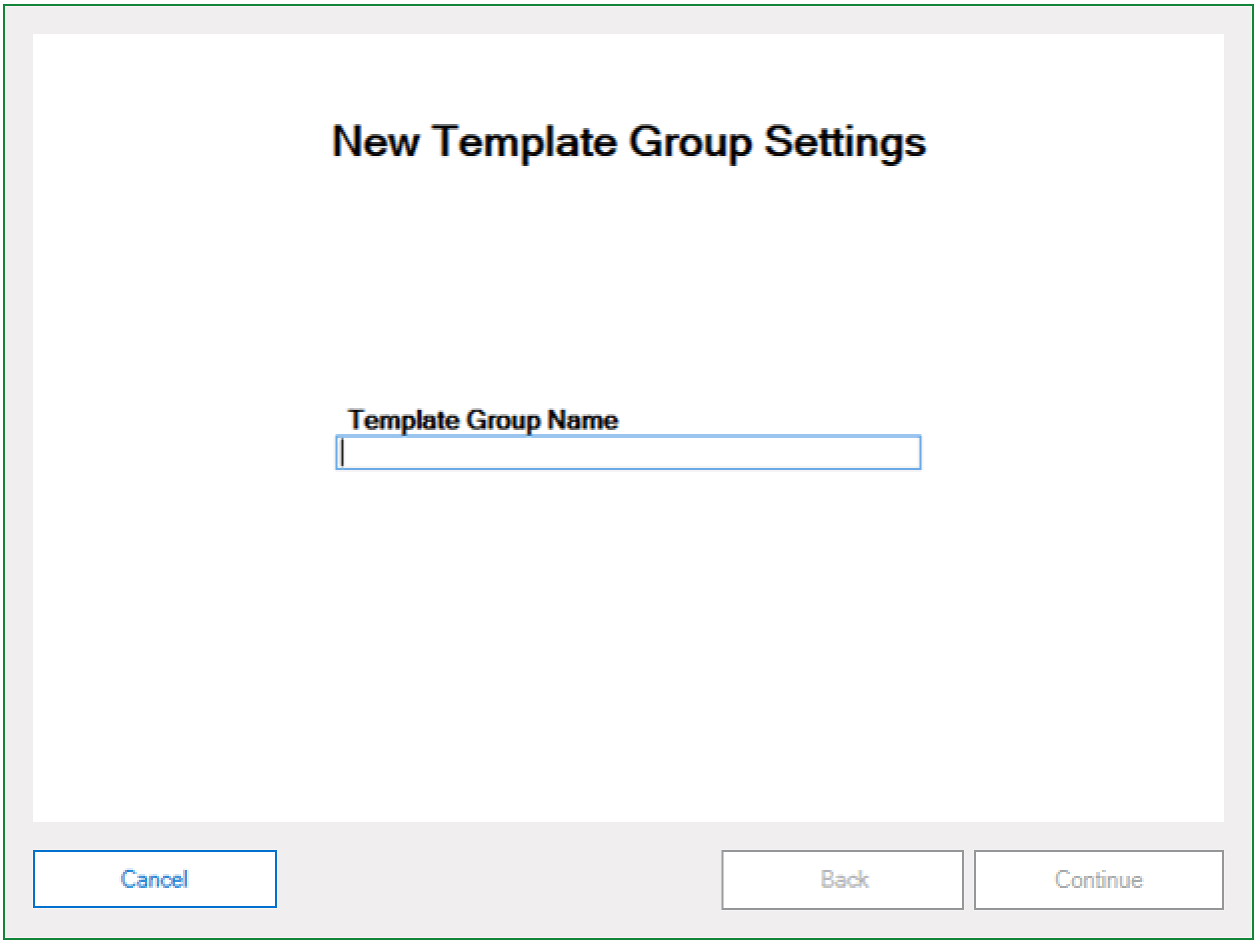
3. The **Control Panel** dialog box is displayed:



4. Click **New Template Group**:



5. The **New Template Group Settings** dialog box is displayed:

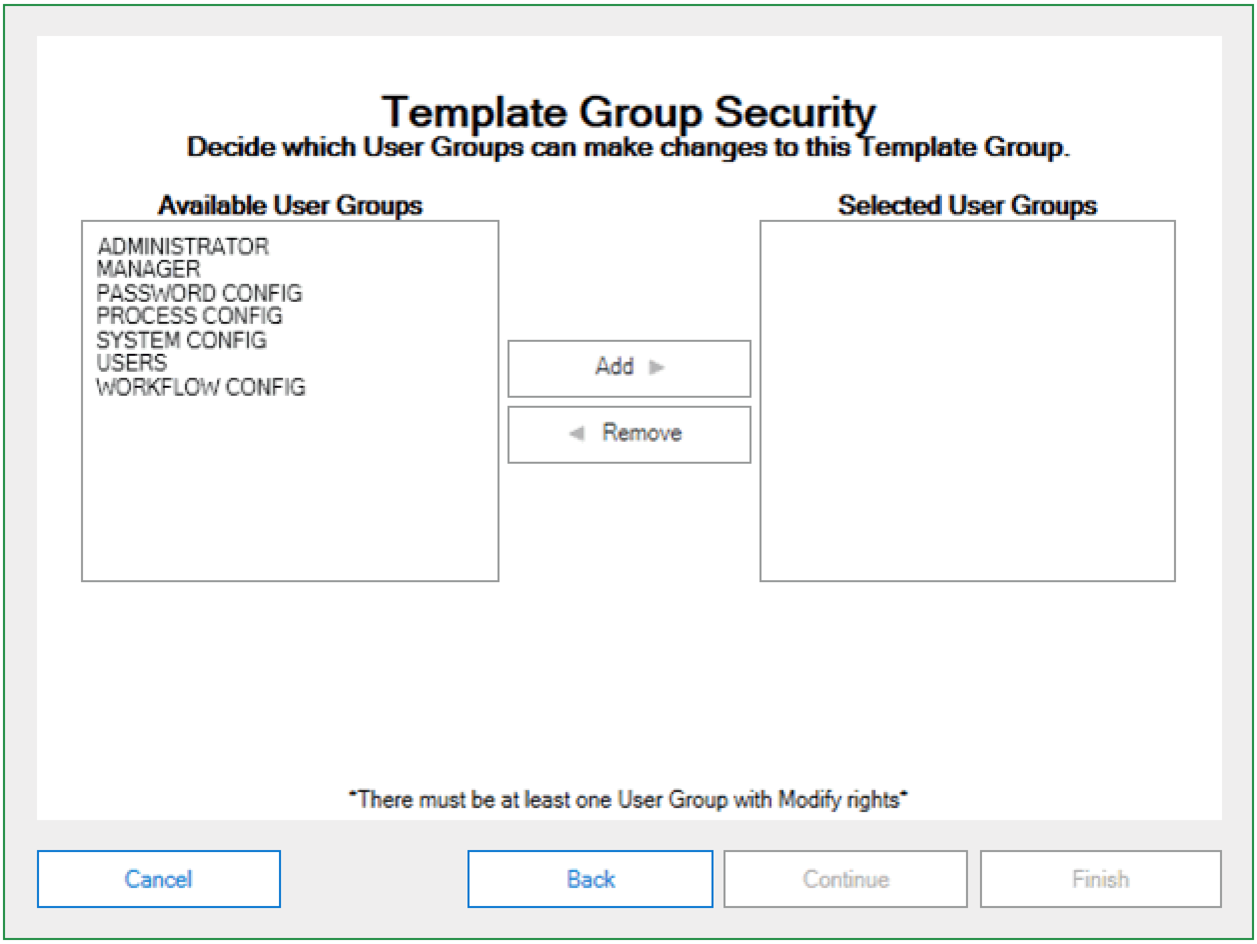


6. Type a name in the **Template Group Name** field.

Note: This name is limited to 100 characters and must be unique.

7. Click **Continue**.

8. The **Template Group Security** dialog box is displayed:



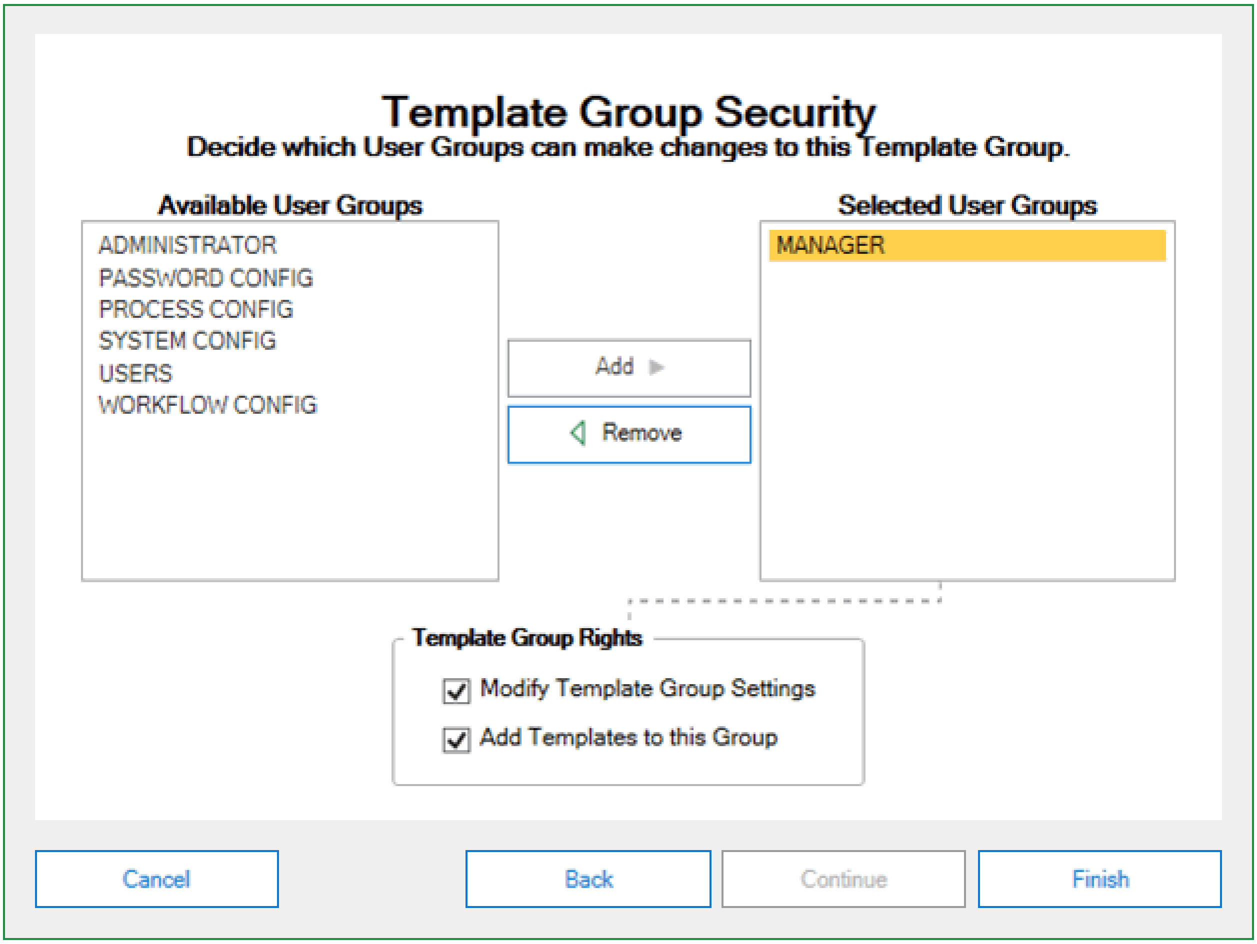
9. Select User Groups in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list.

   Remove User Groups from the **Selected User Groups** list by clicking **Remove** to move them to the **Available User Groups** list.

Note: By default, the MANAGER User Group can access and has rights to all Template Groups, regardless of whether it is displayed in the **Selected User Groups** list.

Note: Only User Groups that have either Document Composition Administration privileges or Word Document Composition privileges are shown in the **Available User Groups** list.

10. The **Template Group Rights** options are displayed:



11. Select the check box(es) that apply to the rights that should be assigned to the User Group:
    - **Modify Template Group Settings** - Select to allow a User Group to edit template group configuration.
    - **Add Templates to this Group** - Select to allow a User Group to create and copy templates for the template group.

Note: You must assign at least one User Group **Modify** rights.

12. Click **Finish**.

Editing Template Groups

Template groups can be edited by a member of a User Group that has been assigned the **Modify Template Group Settings** right in the **Template Group Rights** dialog box.

To edit a template group:

1. Click **Control Panel**.
2. Select a template group from the **Templates** tab.
3. Click **Edit Template Group**:

4. Follow steps 6 to 12 in Creating Template Groups on page 230 to edit the template group settings. You can click Finish at any point to save changes to the template group.

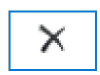
Deleting Template Groups

Template groups can be deleted by a member of a User Group that has been assigned the **Modify Template Group Settings** right in the **Template group Rights** dialog box.

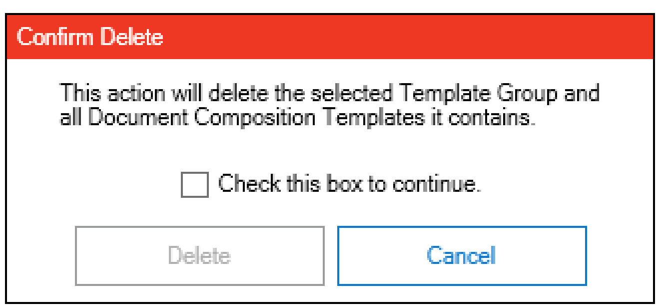
Caution: When you delete a template group, you delete the template group and all templates contained in the template group.

To delete a template group:

1. Click **Control Panel**.
2. Select a template group from the **Templates** tab.
3. Click **Delete**:



4. You are prompted to confirm that you want to delete the template group.
5. Click **Delete** to delete the template group or click **Cancel** to retain the template group.
6. If you clicked **Delete**, you are prompted to confirm that you want to delete the template group by the **Confirm Delete** dialog box:



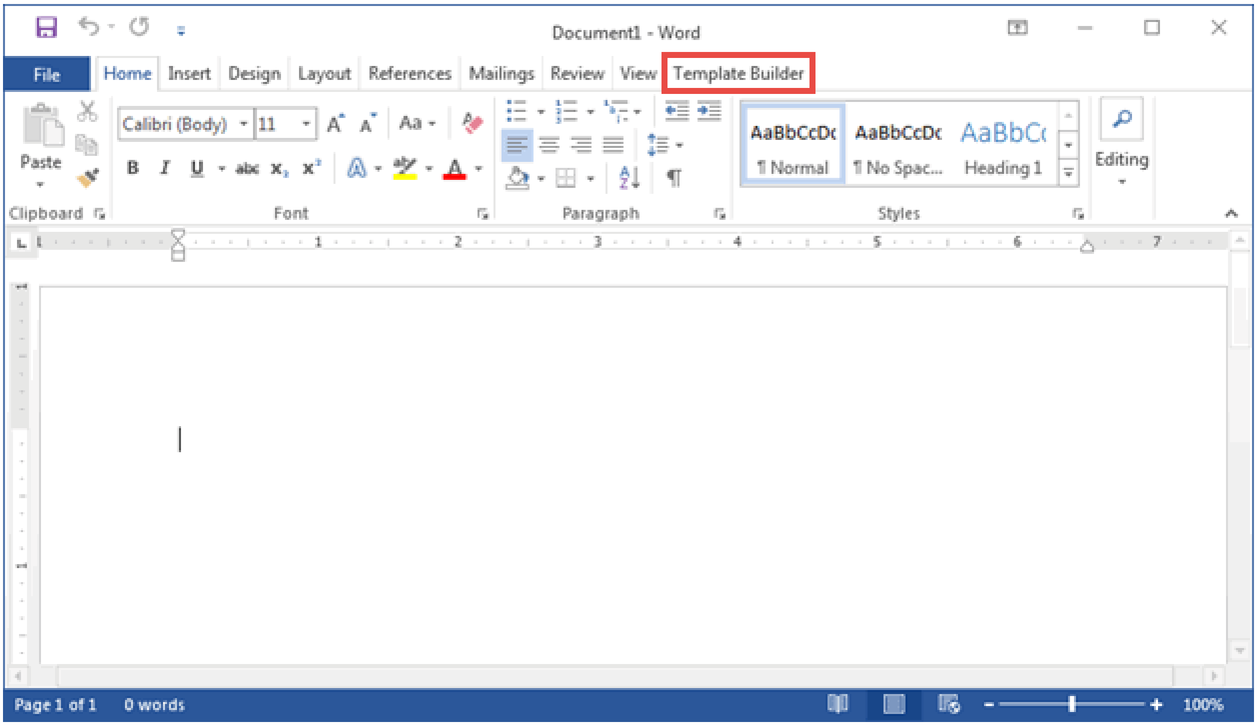
7. Select the **Check this box to continue.** check box and click **Delete** to delete the template group, or click **Cancel** to retain the template group.

Creating Templates

Once a template group is created, templates can be created and stored within that template group.

To create a template:

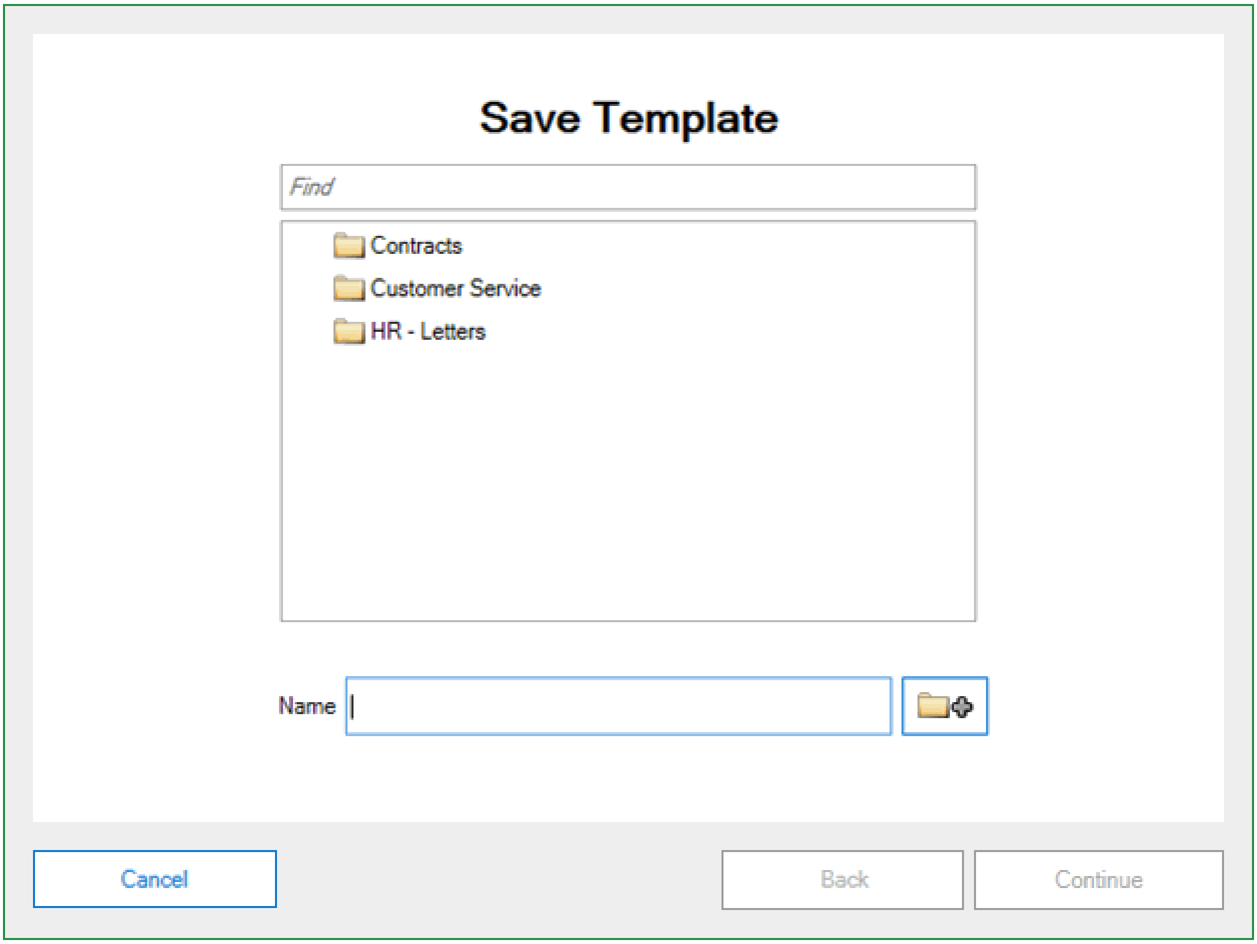
1. Open Word.
2. Click the **Template Builder** tab:



The Template Builder ribbon and a new Release of Information template are displayed:

3. Click **Save Template**.

   The **Save Template** dialog box is displayed:



4. Select the template group that the template should reside in.

   To filter the list, type the name of the template group the template should reside in. The list is filtered as you type.

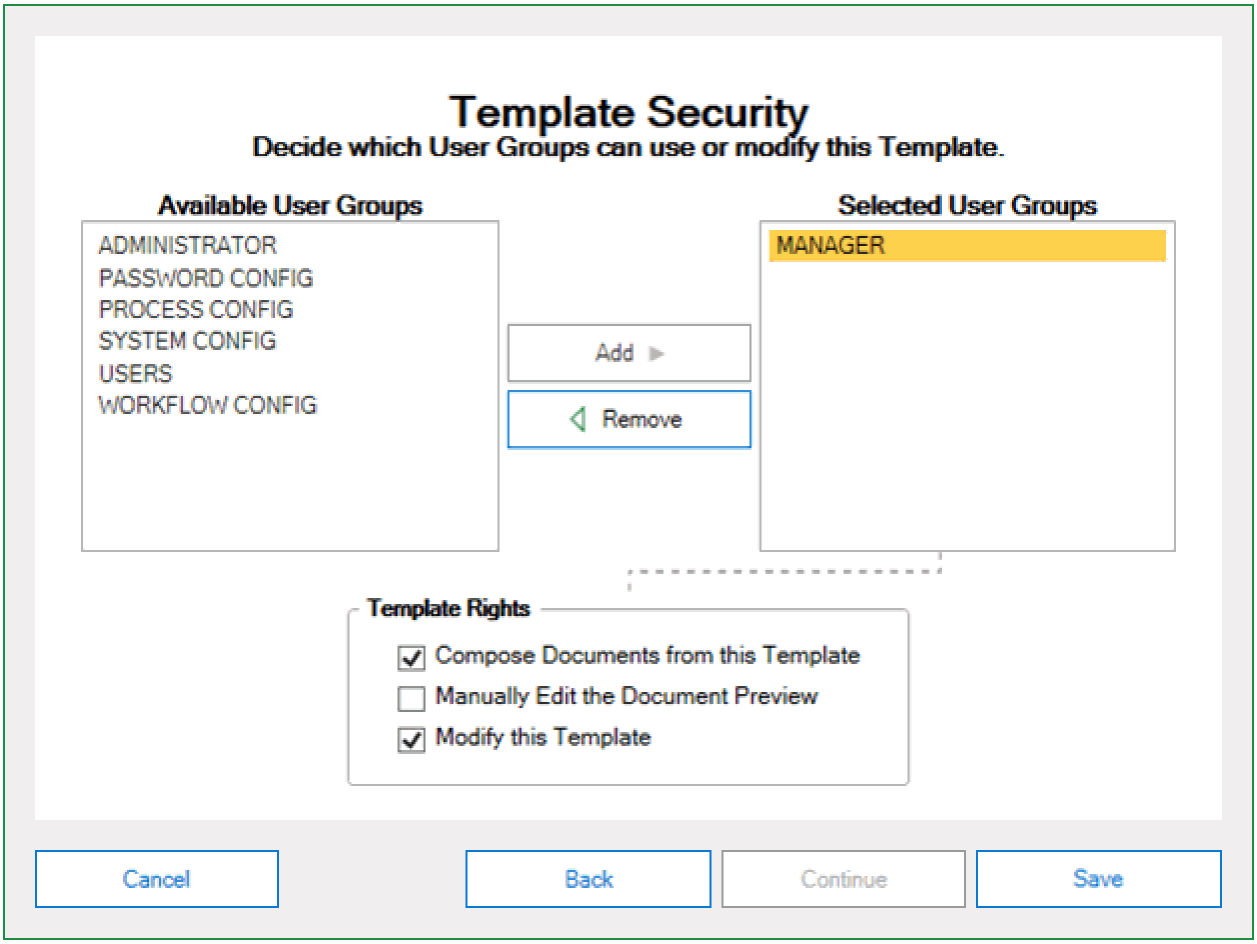
Tip: You can type any part of the template group name to yield results. For example, if you are searching for **HR - Letters**, you can type **letter** to display any template group names containing **letter**.

5. Type a name for the template in the **Name** field.

Caution: Template names must be unique, even across template groups.

Note: Saved templates are stored in the **SYS - Document Template** Document Type. The Keyword Type **Description** is assigned by default to this Document Type. Depending on your configuration, this Keyword Type has a maximum value of up to 200 characters. By default, each template is given the **Description** Keyword Value of "COMPOSITION TEMPLATE - [TEMPLATE NAME]". Due to this default **Description** Keyword Value format, the character limit of the template **Name** is 23 characters fewer than your system's configured character limit for the **Description** Keyword Type.

6. Click **Continue**.
   The **Template Security** dialog box is displayed:



7. Select User Group names in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list on the right. By default, your User Group is displayed in this list.

   Remove User Group names from the **Selected User Groups** list by clicking **Remove** to move the user names to the **Available User Groups** list.

Note: When a User Group is the only group with rights to the template and then has **Word Document Composition** and **Document Composition Administration** privileges removed, that User Group's rights to the template can not be removed within the **Template Security** dialog box. In order to edit the template's security, the User Group with rights to the template must have **Document Composition Administration** privileges. If this is not an option, please contact your first line of support.

8. Select a User Group from the **Selected User Groups** list to display and configure template rights for that User Group. The following options are available:

Security	Description
Compose Documents from this Template	Allows the User Group to create a document from a configured template.
Manually Edit the Document Preview	Allows the User Group to edit the composed document during preview prior to importing it into OnBase. If this right is not given to the User Group, users are not be able to edit the previewed document prior to import into OnBase.
Modify this Template	Allows the User Group to modify **Template Options**. **Note:** There must be at least one User Group configured with this template right.

9. Click **Save** to save the template.

Caution: Templates that are deleted from the **SYS - Document Template** Document Type are still available for selection in the Template Builder. For this reason, templates should be deleted using the Template Builder. See Deleting Templates on page 245 for more information.

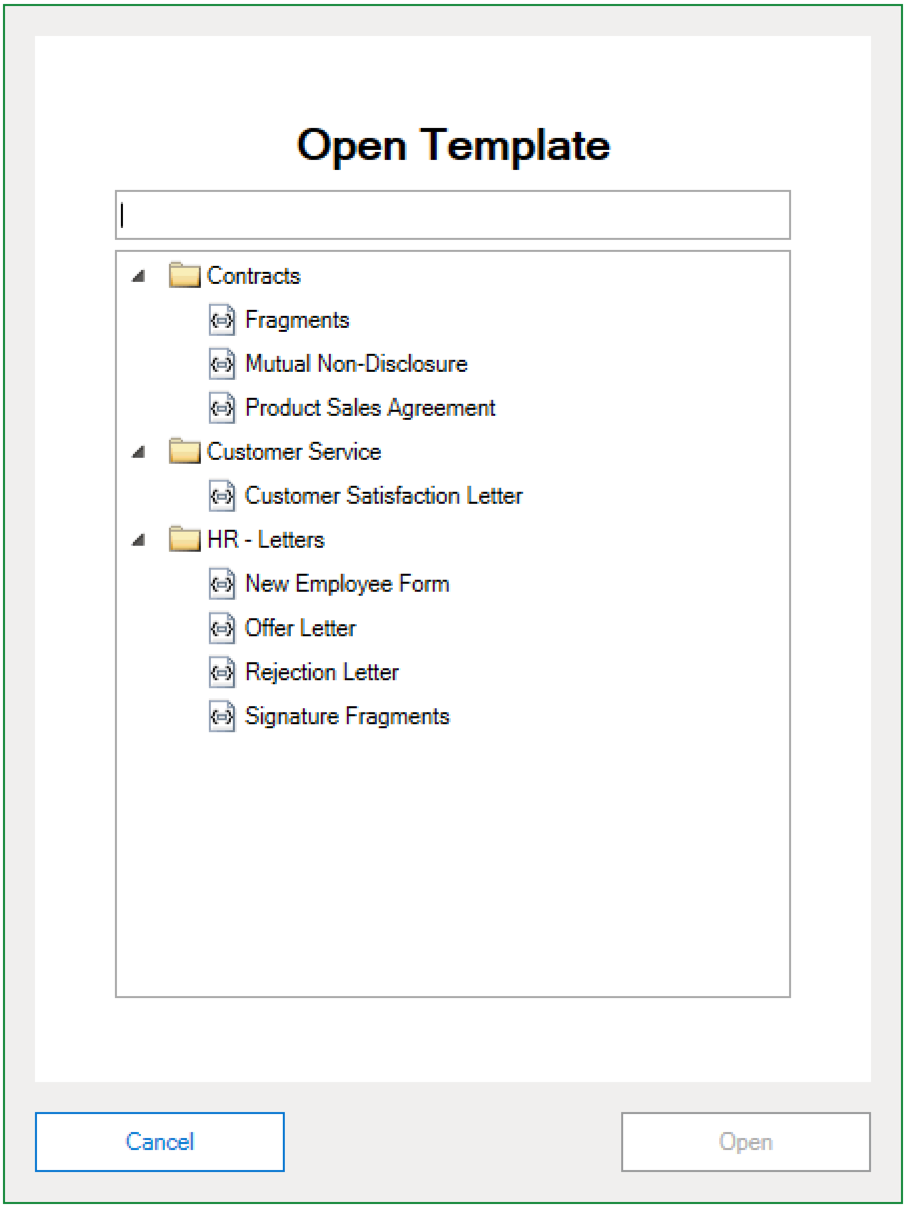
Your User Group(s) is automatically assigned **Compose Documents from this Template** and **Modify this Template** rights to the template you created.

Viewing and Editing Templates

Depending on your rights, you can view and edit existing templates.

To view and edit a template:

1. Click **Open Template**.
   The **Open Template** dialog box is displayed. By default, each template group is expanded to display its associated templates:



2. To filter the list, type the name of the desired template or the template group the desired template is associated with. The list is filtered as you type.

Tip: You can type any part of the template or template group name to yield results. For example, if you are searching for **HR - Offer Letter**, you can type **letter** to display any template or template group names containing **letter**.

Click the triangles to the left of template groups to collapse or expand template groups as needed.

3. Select the desired template.
4. Click **Open**.

   The template is opened and displayed.
5. Edit the document as desired.
6. Click **Save Template** to save your changes.

Saving a Template Locked by Another User

A document lock is placed on a template when a user opens it, so only that user can edit the template. You cannot save changes to a template locked by another user. When attempting to save changes to a locked template, you are notified the template is locked and prompted to create a new a template instead.

To save your changes to the template, either the other user must close the template, or the document lock must be removed from within OnBase.

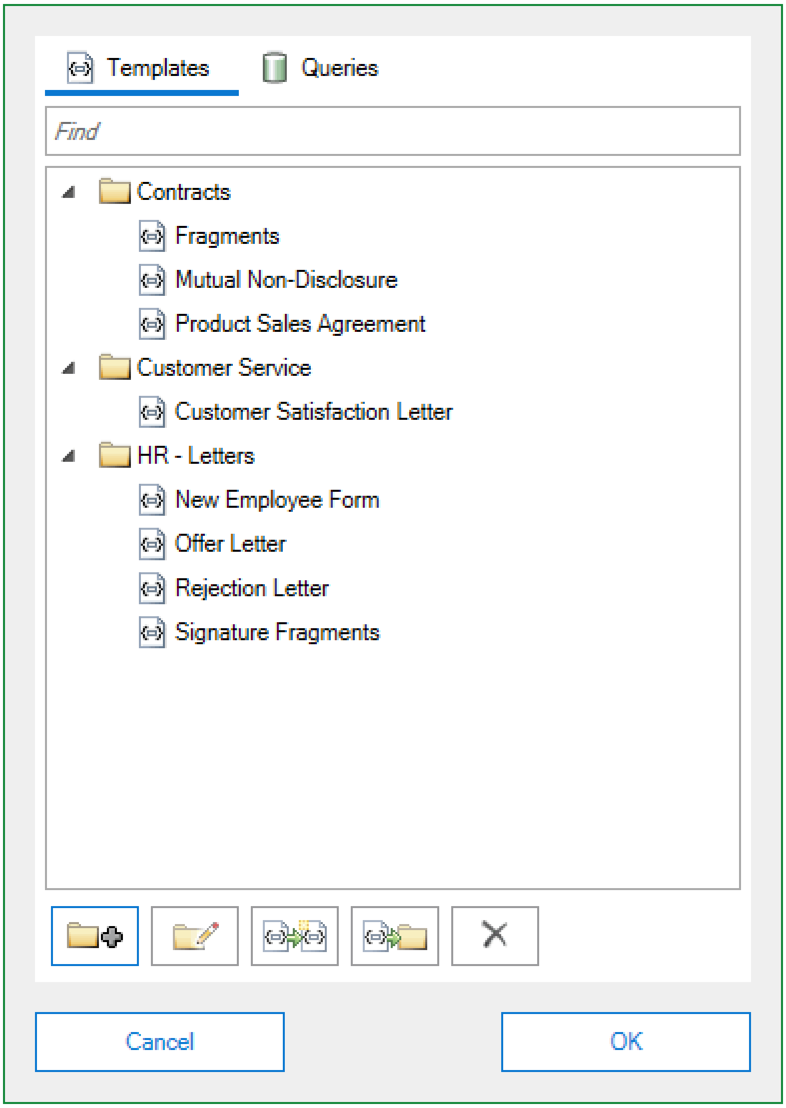
Copying Templates

Once a template has been created, the template can be copied. This can save time when configuring many similar templates.

To copy a configured template:

1. Click **Control Panel**.

   The control panel is displayed:



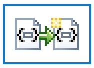
2. On the **Templates** tab, select a template.
3. To filter the list, type the name of the desired template or template group the template belongs to. The list is filtered as you type.

Tip: You can type any part of the template or template group name to yield results. For example, if you are searching for **HR - Offer Letter**, you can type **letter** to display any template or template group names containing **letter**.

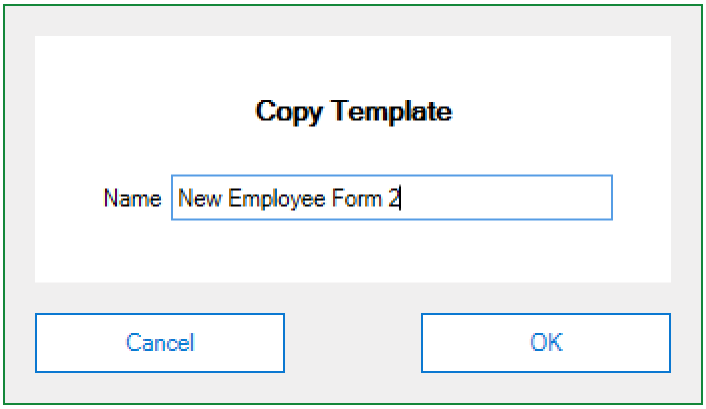
   Click the triangles to the left of template groups to collapse or expand template groups as needed.

4. Select a template.

5. Click **Copy Template**:



The **Copy Template** dialog box is displayed:



6. The name of the template you are copying is displayed in the **Name** field.
7. Edit the **Name** field to be the new name for the copied template.
8. Click **OK**.
   The duplicate template is created and saved to the same template group.

Moving Templates

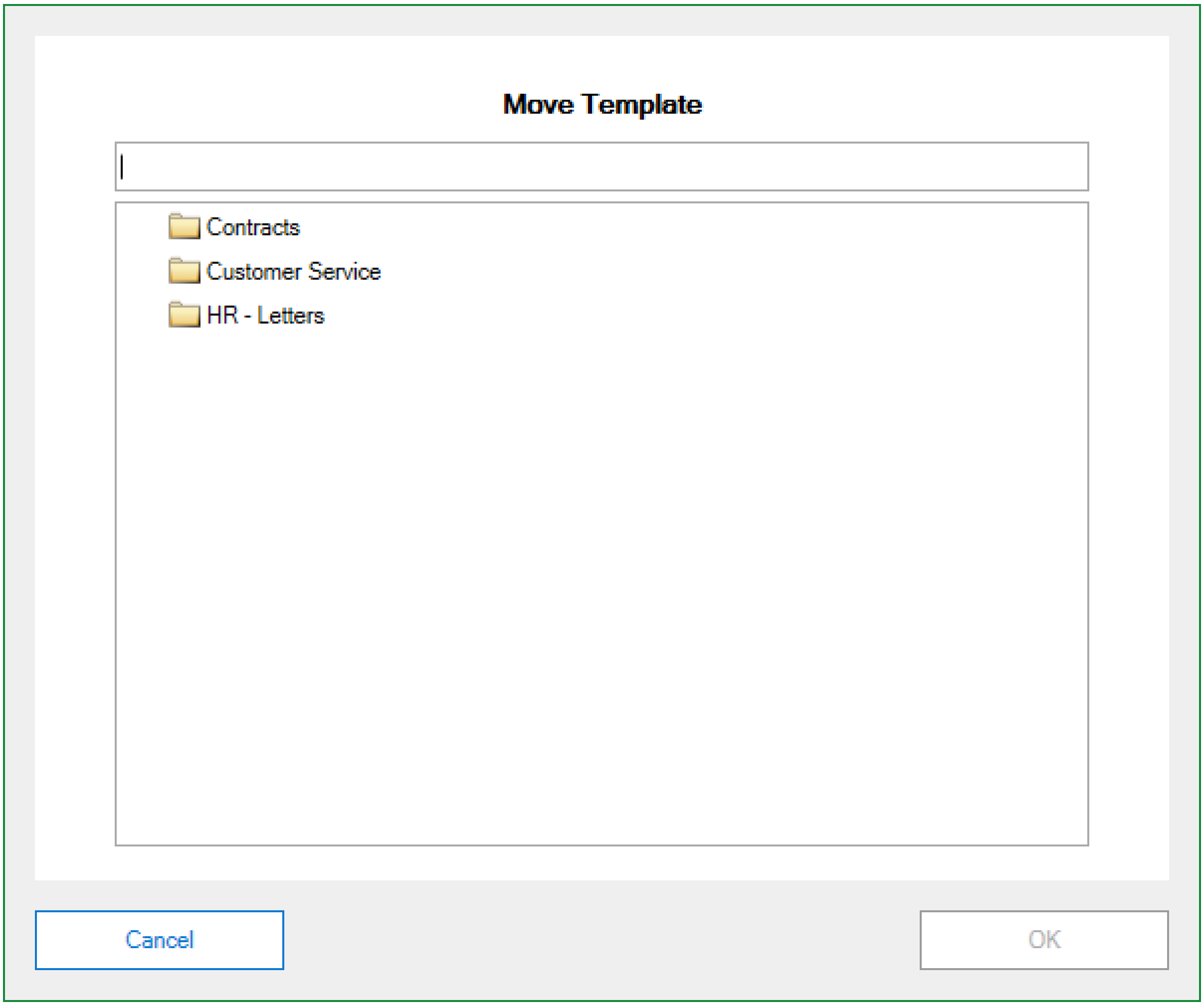
Templates can be moved between template groups.

To move a template:

1. Click **Control Panel**.
2. On the **Templates** tab, expand a template group.
3. Select a template.

4. Click **Move Template**:

The **Move Template** dialog box is displayed:



5. To filter the list, type the name of the desired template group. The list is filtered as you type.

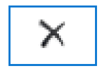
Tip: You can type any part of the template group name to yield results. For example, if you are searching for **HR - Letters**, you can type **letter** to display any template group names containing **letter**.

6. Select the template group that the template should be moved to.
7. Click **OK** to move the template or click **Cancel** to keep the template in its original template group.

Deleting Templates

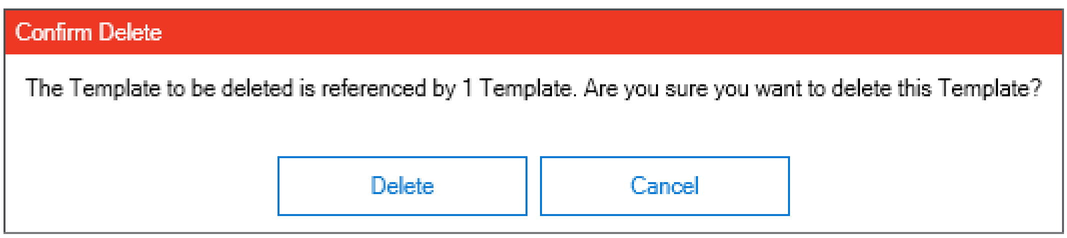
To delete a template:

1. Click **Control Panel**.
2. On the **Templates** tab, expand a template group.
3. Select a template.
4. Click **Delete**:



   You are prompted to confirm whether you want to delete the template.

   If the template is being referenced by another template (e.g., in a Document Fragment Placeholder), the number of affected templates is displayed:



5. Click **Delete** to delete the template or click **Cancel** to keep the template.

Exporting and Importing

Depending on your rights, you can export and import existing Release of Information configuration items directly from the Template Builder.

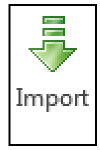
Note: Only packages exported using the Template Builder can be imported using the Template Builder.

To access the **Export** dialog box, click **Export**:

The following types of configuration items can be exported from a database:

- Document Composition ODBC Inputs
- Document Composition Templates

To access the **Import** dialog box, click **Import**:



When importing an export package, additional associated configuration items may require decisioning.

For more information on using the **Export** and **Import** dialog boxes, see the **System Administration** module reference guide.

For information on exporting and importing Release of Information configuration items using the OnBase Configuration module, see Configuration on page 263.

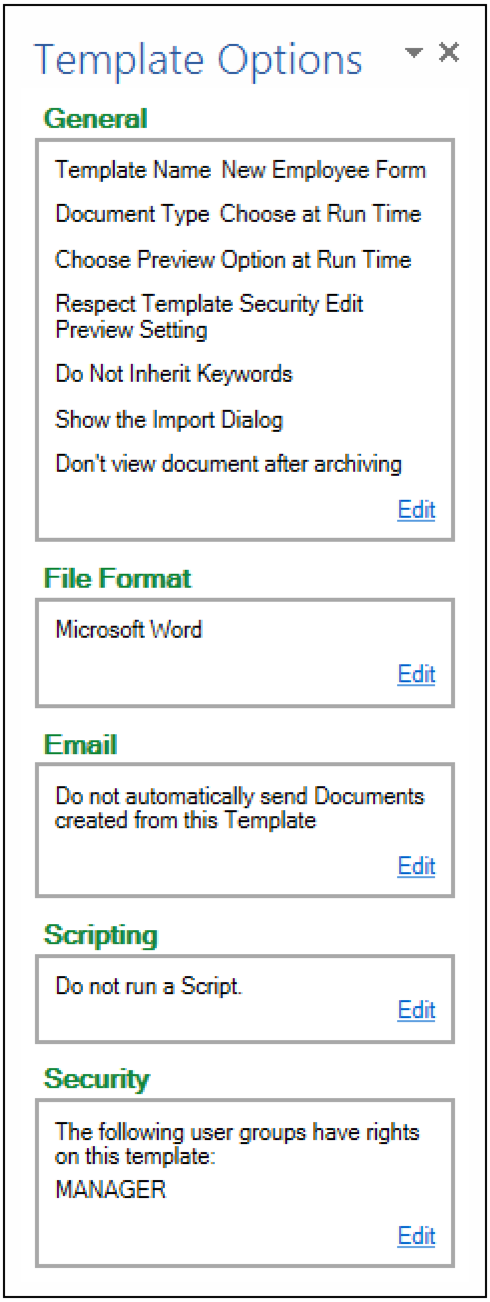
For information on exporting and importing Release of Information configuration items using OnBase Studio, see Studio on page 264.

Configuring Template Options

Once a template is created, there are additional options in the **Template Options** pane to configure. These settings are enforced when a document is created using the template.

To configure template options:

1. Click **Template Options**.
2. The **Template Options** pane is displayed:

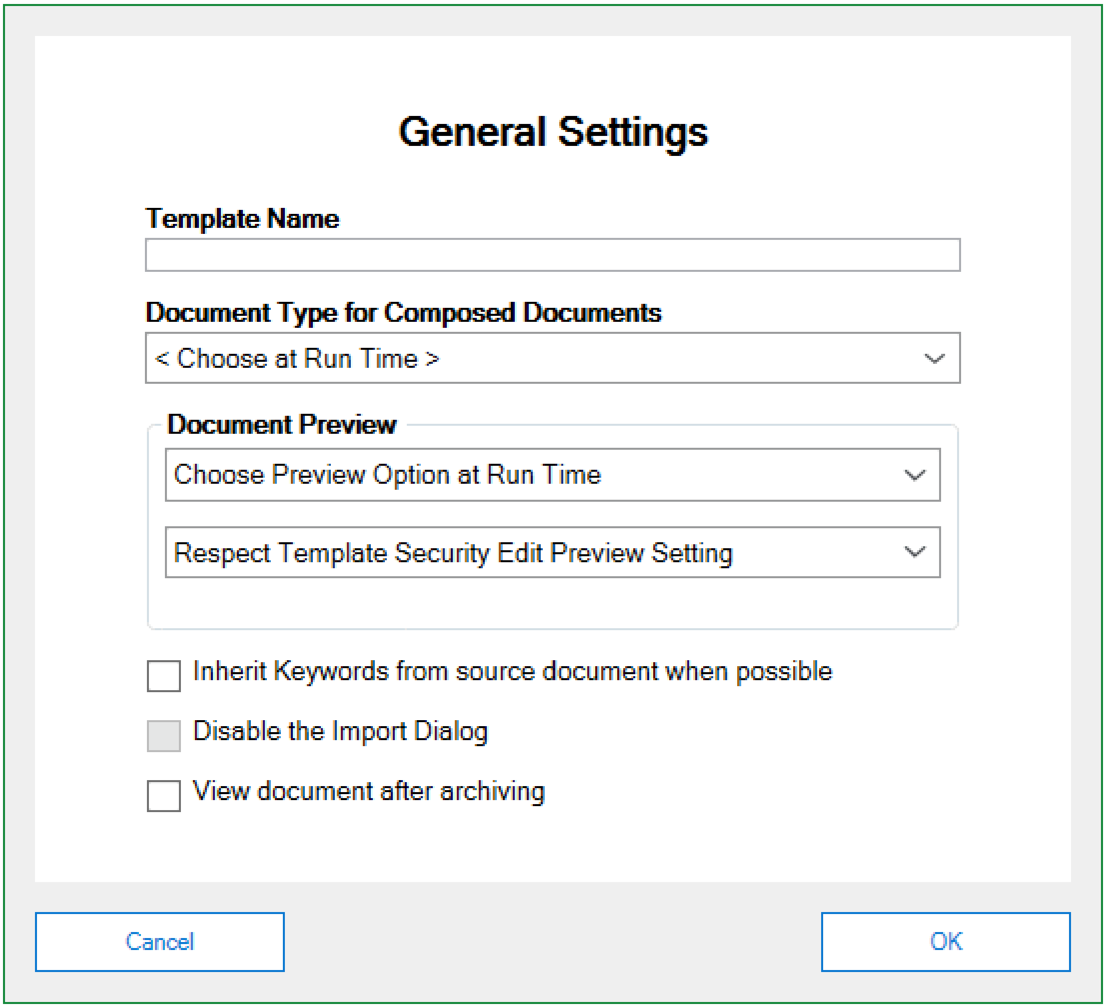


3. Select the **edit** hyperlink in one of the following areas of the **Template Options** pane:

Area	Description
General	Click to edit general template settings. See General Settings on page 249 for more information.
File Format	Click to edit file format settings. See File Format Settings on page 251 for more information.
Email	Click to edit e-mail settings. See Email Settings on page 253 for more information.
Scripting	Click to edit scripting settings. See Scripting Settings on page 255 for more information.
Security	Click to edit security settings. See Security Settings on page 256 for more information.

4. After you have finished configuring template options, click **Save Template** to save the configured **Template Options**.

General Settings

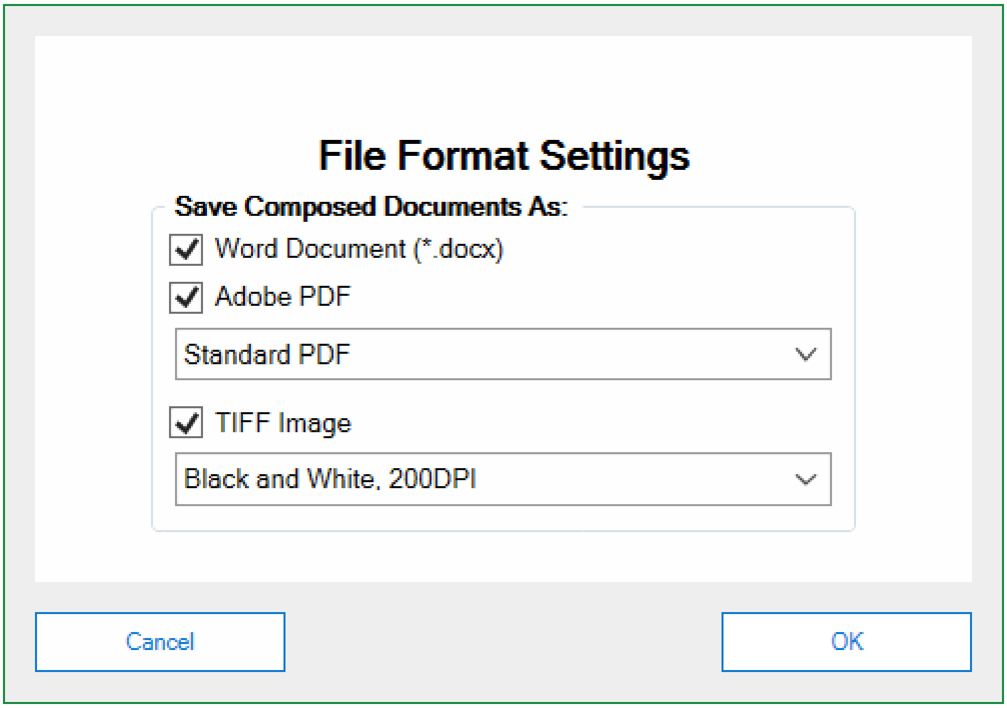


Tip: When configuring ROI templates, it is considered a best to always select the **Inherit Keywords from Source Document** when possible and **Disable the Import Dialog** options. By doing this, generated templates are more automated, so the ROI specialist does not need to manually insert Keyword Values and upload the document.

General Settings	Description
Template Name	Displays the name of the template. Modify the template name if necessary.
Document Type for Composed Documents	Select a Document Type from the drop-down list to enforce a default Document Type into which the composed document will be imported. Select **<Choose at Run Time>** to allow users to select the Document Type during document composition.

General Settings	Description
Document Preview	Select Preview options for composed documents from the drop-down lists: Select **Choose Preview Option at Run Time** to give users the option to preview documents before archiving in OnBase. Select **Always show Preview before archiving** to force document previewing before archiving in OnBase. Select **Respect Template Security Edit Preview Setting** to respect User Group template security settings. Select **Restrict Edit Preview Setting to Select Placeholder Values** and click **Select Editable Placeholders** to specify placeholders that are editable. With this setting selected, the **Edit During Preview** dialog box is displayed during Placeholder configuration. **Note:** Previews are not displayed for documents created using the Cover Letter or Inventory template, regardless of this setting.
Placeholder Settings	Click the **Select Required Placeholders** hyperlink to set the required Placeholders for the template. Required Placeholders must be populated in order for composition to complete. After clicking **Select Required Placeholders**, the **Select Required Placeholders** dialog box is displayed. Select the appropriate Placeholder and use the arrow buttons to move Placeholder to either the **Required** column or the **Not Required** column. Then, click **Finish**.
Inherit Keywords from Source Document when possible	Select to inherit Keyword Values from the source document.
Disable the Import Dialog	This option is enabled when **Inherit Keywords from Source Document when possible** and a **Document Type for Composed Documents** are selected. This option disables the **Import** pane and automatically stores the template into the Document Type specified in the **Document Type for Composed Documents** drop-down list. **Caution:** Currency and Specific Currency Keyword Types are not inherited when the **Import** dialog box is disabled. This is a known limitation.
View document after archiving	Select to view composed documents after archiving in OnBase. **Note:** This option will select and disable **View Document After Archiving** on the **Select Template Option** dialog box when composing a document.

File Format Settings



You can select one or multiple **File Format Settings**:

Note: If you are configuring a cover sheet or inventory page template, this setting is ignored.

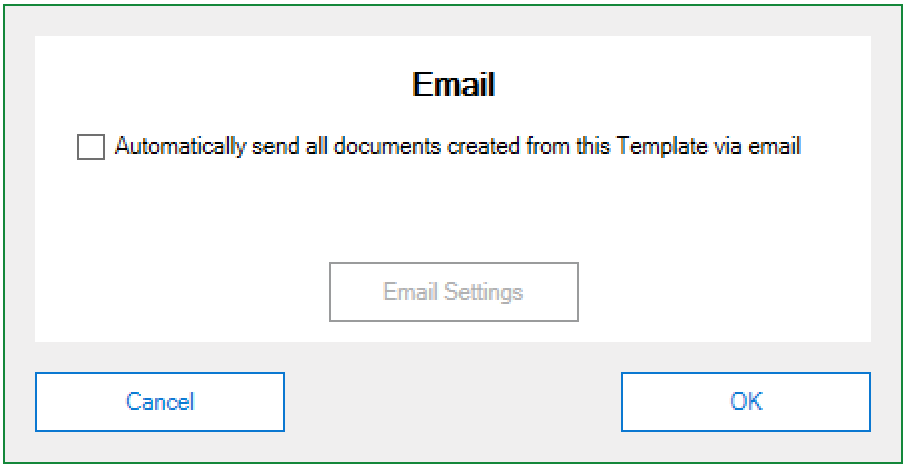
File Format Settings	Description
Word Document (*.docx)	Select to save the composed document as a Word document (.docx).
Adobe PDF	Select to save the composed document as an Adobe PDF. When selected, a drop-down list is displayed. Select **Standard PDF** to save the composed document as a standard PDF file. Select **PDF/A-1A** to save the composed document as a PDF/A-1A file. Select **PDF/A-1B** to save the composed document as a PDF/A-1B file.

File Format Settings	Description
TIFF Image	Select to save the composed document as a TIFF image. When selected, a drop-down list is displayed. Select one of the following image quality settings from the drop-down list: • **Black and White, 100 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 100 DPI TIFF. • **Black and White, 200 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 200 DPI TIFF. • **Black and White, 300 DPI** - Select to save the composed document as a black and white (CCITT4 compression) 300 DPI TIFF. **Note:** When saving as black and white, ensure composed documents save as expected. Colors in these documents are converted to either black or white depending on how dark or light they are. For example, if a Placeholder value is formatted to be yellow, the value may be converted to white, thereby appearing as blank on the composed document. • **Greyscale, 100 DPI** - Select to save the composed document as a greyscale 100 DPI TIFF. • **Greyscale, 200 DPI** - Select to save the composed document as a greyscale 200 DPI TIFF. • **Greyscale, 300 DPI** - Select to save the composed document as a greyscale 300 DPI TIFF. • **Color, 100 DPI** - Select to save the composed document as a color (LZW compression) 100 DPI TIFF. • **Color, 200 DPI** - Select to save the composed document as a color (LZW compression) 200 DPI TIFF. • **Color, 300 DPI** - Select to save the composed document as a color (LZW compression) 300 DPI TIFF.

When composing a document using a template configured to use multiple file formats:

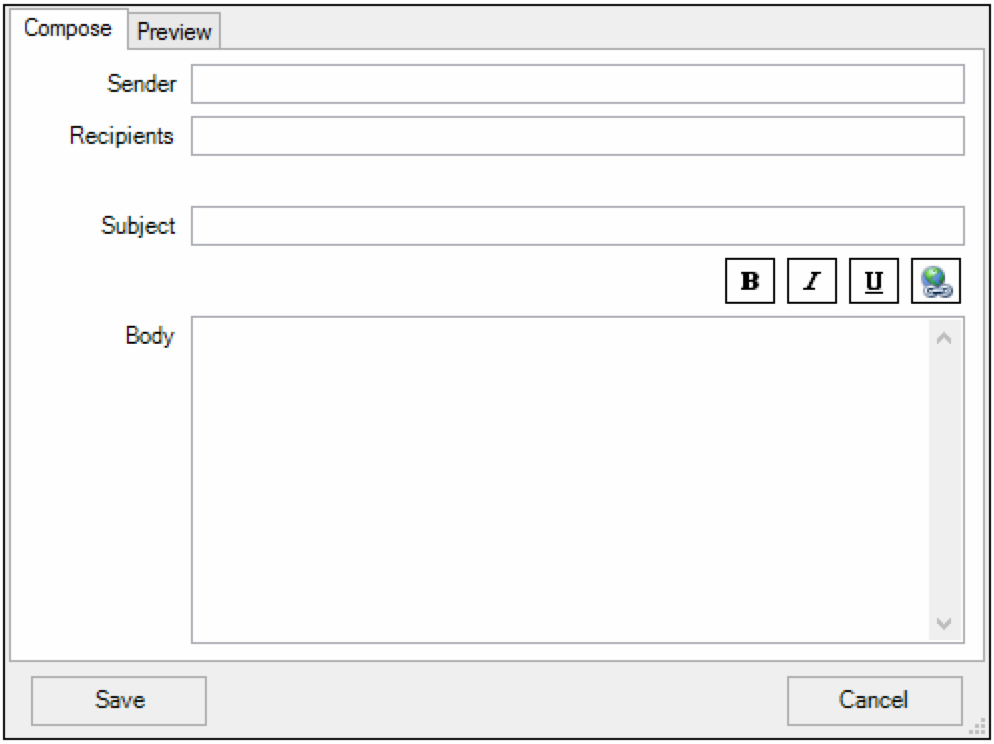
- The document must be stored in a Document Type configured to allow multiple renditions. For information on configuring renditions, see the System Administration documentation.
- Documents are stored to OnBase in the following order:
  - .docx
  - PDF
  - TIFF
- If the user previews and edits the template in Word, any modifications are included in the PDF or TIFF.

Email Settings



Email Settings	Description
Automatically send all documents created from this Template via email	Select to send an email notification via the Hyland Distribution Service when a document is generated with this template. This notification is sent after the document is archived in OnBase. Selecting this option enables the **Email Settings** button.

Click **Email Settings** to configure the email message in the **Email Options** dialog box:

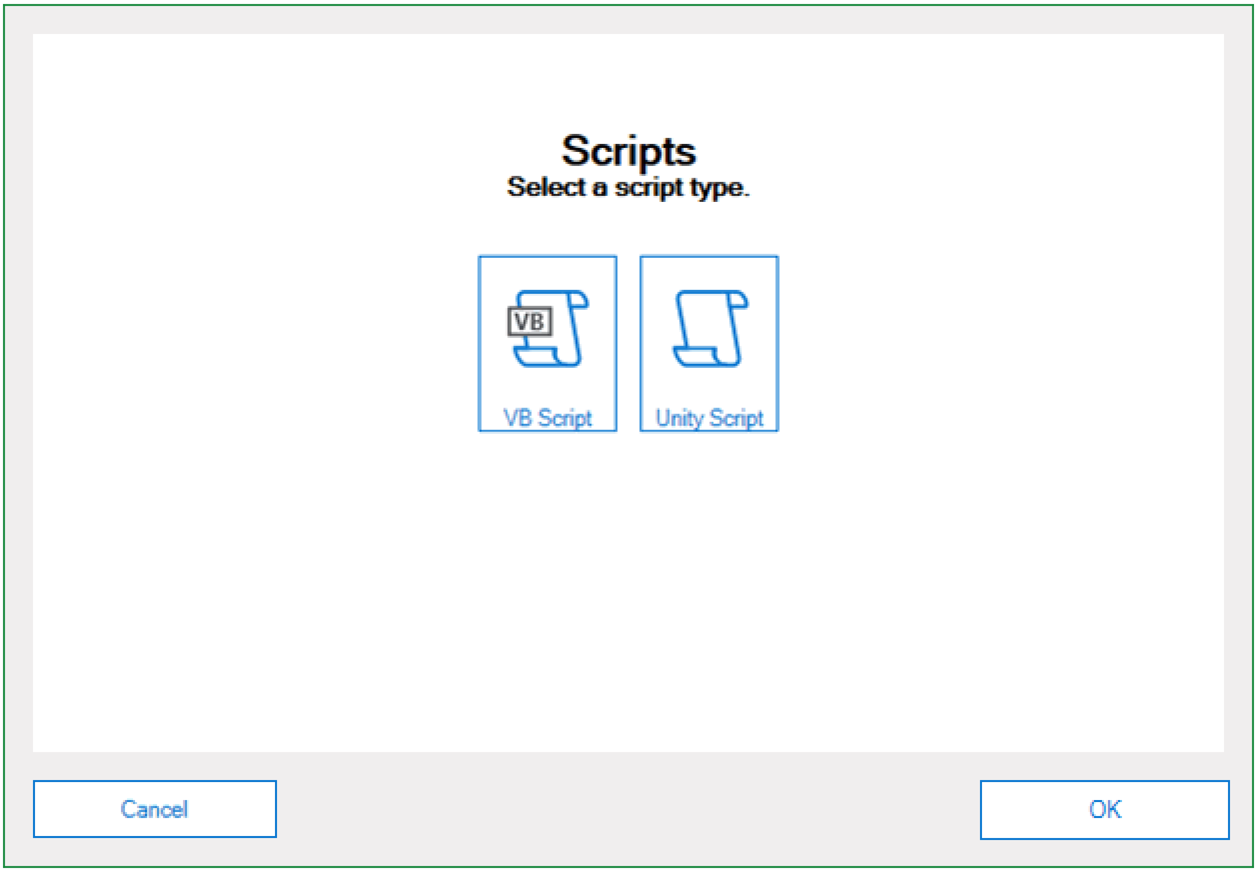


Option	Description
Sender	Type the email address of the sender.
Recipients	Type the email address of the recipient. Separate multiple recipients with semi-colons.
Subject	Type the subject of the email.
Body	Type the body text of the email. To apply formatting, select the text and click the **Bold**, **Italic**, or **Underline** buttons. HTML tags signify that formatting has been applied. For example, Sincerely appears as **Sincerely** in the email message that will be sent. To add a hyperlink to the email, click the **Insert Hyperlink** button. In the **Insert Hyperlink** dialog box, type the text that should appear in the email message body in the **Text** field. Type the URL of the hyperlink in the **URL** field. Click **OK** to add the hyperlink to the email message.

Select the **Preview** tab to preview what your email notification will look like.

Click **Save** to save the email notification.

Scripting Settings



Select one of the following:

- VB Script
- Unity Script

If you clicked the **VB Script** button, select the desired VB Script from the **Select VB Script to run** drop-down list.

Note: You are notified when a selected VB Script may be referencing the DMCoreX API. The DMCoreX API has been deprecated. Therefore, VBScripts using this API no longer run during document composition. This does not affect whether a document is successfully composed. Contact your first line of support for more information.

For more information on creating VB Scripts, see the **System Administration** documentation.

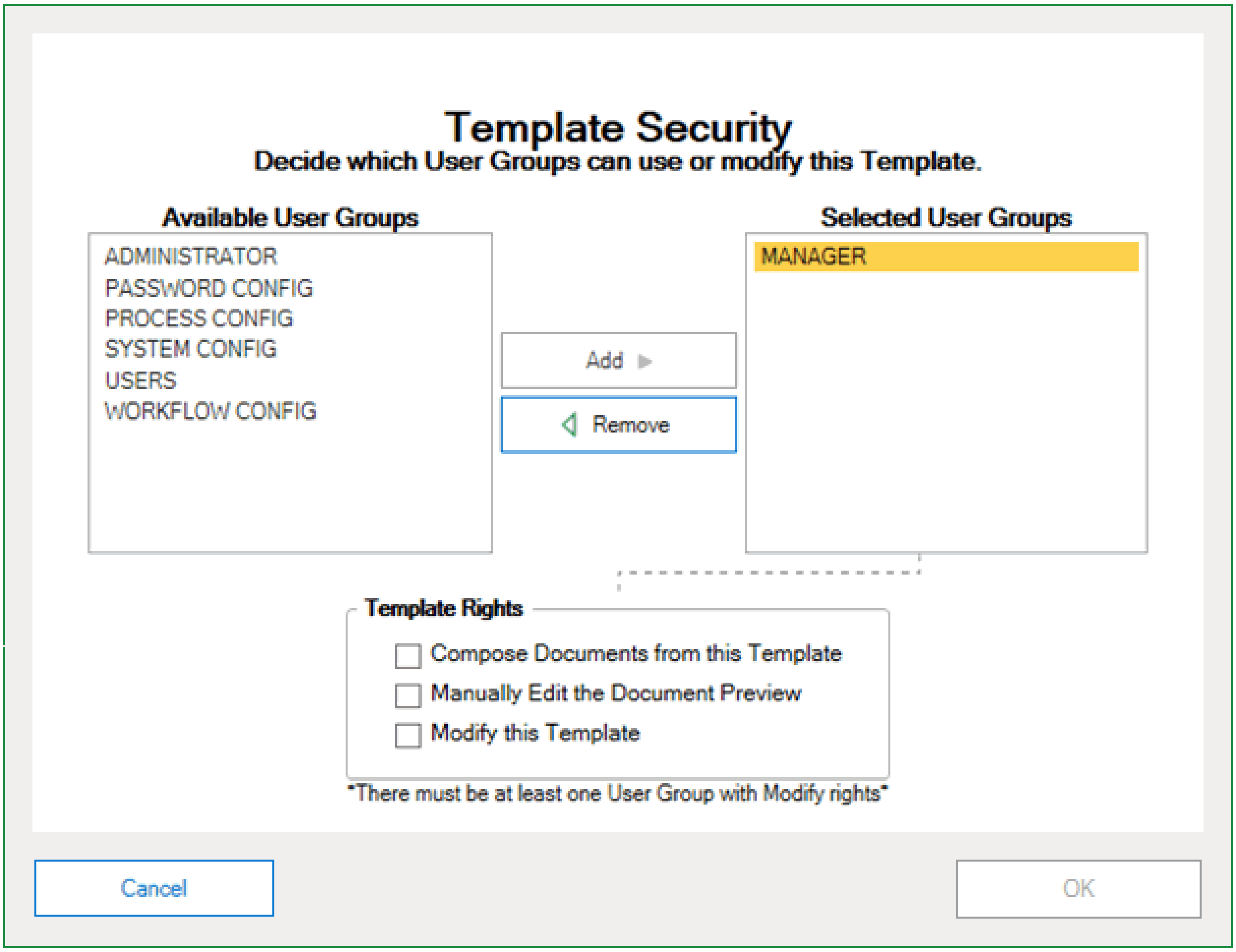
Note: VB Scripts are not supported using a 64-bit Application Server.

If you clicked the **Unity Script** button, select the desired Unity Script from the **Select Unity Script to run** drop-down list.

Note: For more information creating Unity Scripts, contact your first line of support.

When **<Do not run a Script on this Template>** is selected, no scripts will run.

Security Settings



Select User Group names in the **Available User Groups** list and click **Add** to add them to the **Selected User Groups** list on the right.

Note: Only User Groups with Document Composition Administration or Word Document Composition privileges are listed in the **Available User Groups** list.

Remove User Group names from the **Selected User Groups** list by clicking **Remove** to move the user names to the **Available User Groups** list.

When each **Selected User Group** is selected, the following **Template Rights** are available:

Security	Description
Compose Documents from this Template	Allows the User Group to create a document from a configured template.
Manually Edit the Document Preview	Allows the User Group to edit the composed document during preview prior to importing it into OnBase. If this right is not given to the User Group, users are not be able to edit the previewed document prior to import into OnBase.
Modify this Template	Allows the User Group to modify **Template Options**. **Note:** There must be at least one User Group configured with this template right.

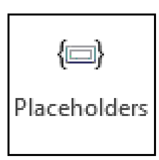
Placeholders

Placeholders pull values from OnBase into the document template. Placeholders can be placed in the body of a Microsoft Word document. Placeholders can also be placed in other areas, such as headers and footers.

Creating Placeholders

To create Placeholders:

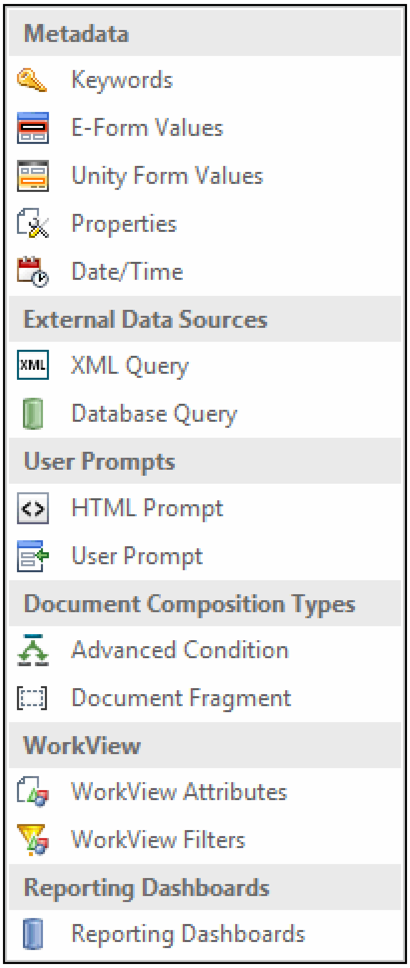
1. In the **Placeholders** group on the **Template Builder** ribbon, perform one of the following:
   - Click **Create New**, and log in to OnBase, if prompted.
   - Click **Placeholders**, and log in to OnBase, if prompted:

   The **Placeholder** pane is displayed. Click **Create New**:

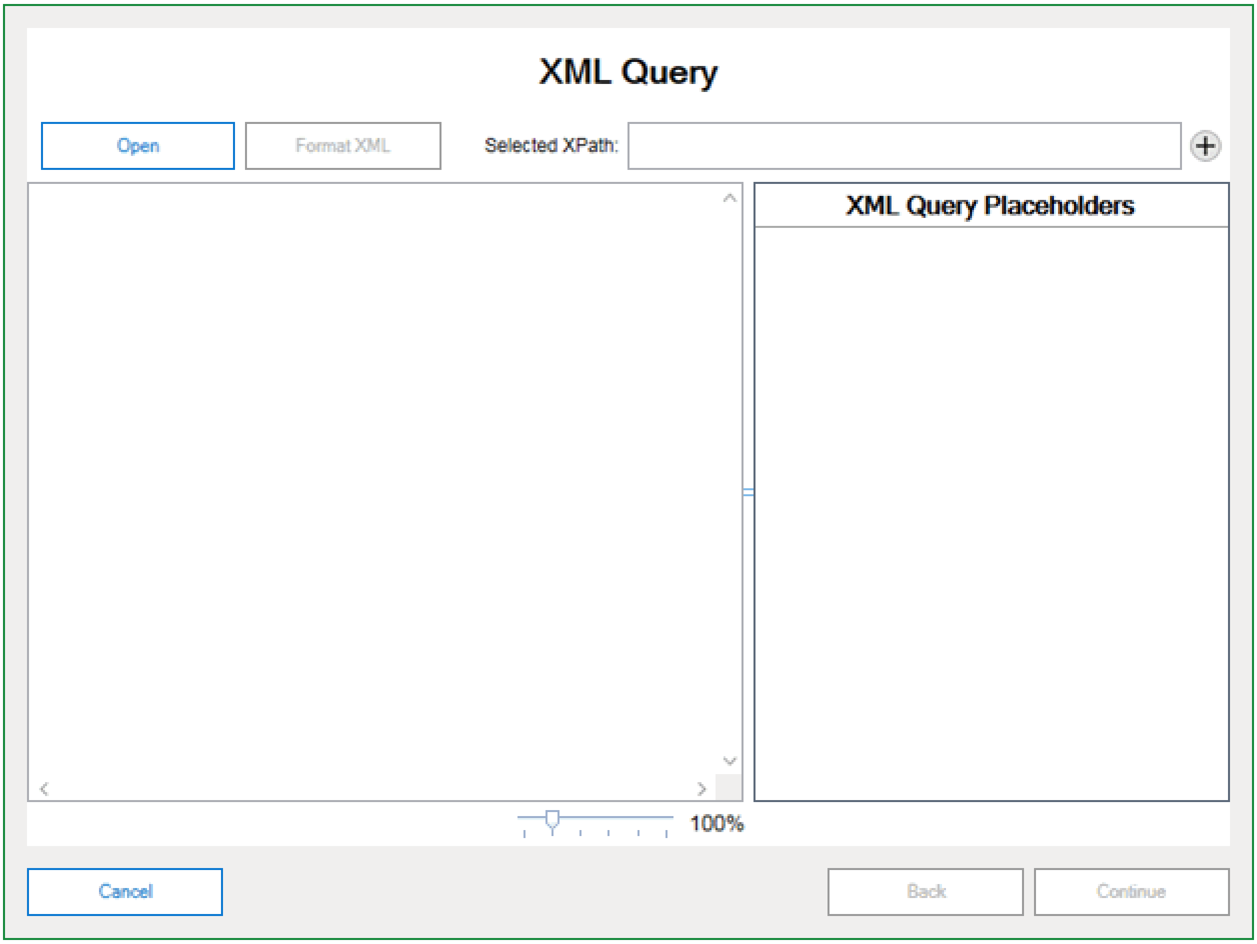
   

2. The **Create New** drop-down list is displayed:



3. Select **XML Query**.

4. The **XML Query** dialog box is displayed.



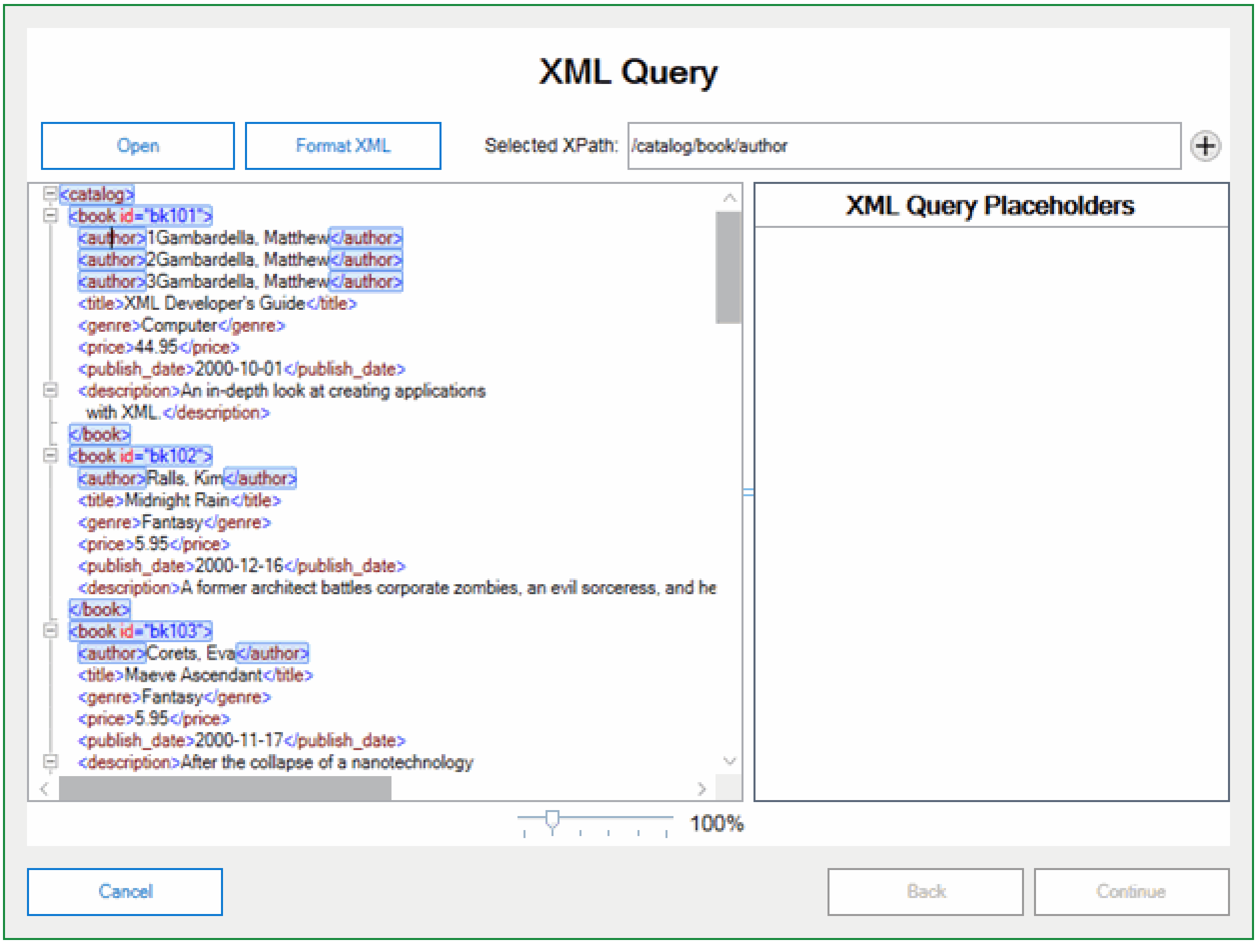
5. Enter the XPath in the **Selected XPath** field using one of the following methods:
    - Type the XPath in the **Selected XPath** field. For example, **/data/listdata** or **/data/rowdata**. Skip to step 7.
        - For ROI in standard mode, see XML Schema for Template Creation - Standard Mode on page 209.
        - For ROI in integrated mode, see XML Schema for Template Creation - Integrated Mode on page 221.

Note: The initial / in the XPath is required if the root node is not specified first in the XPath.

Note: If the XPath contains internal " " (quotation marks), the XPath must be entered into the **Selected XPath** field manually.

- Click **Open** to select an XPath from an XML file. Continue to step 6.

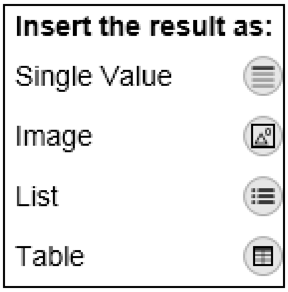
6. Select an XML element or attribute from the XML file content pane. The **Selected XPath** field is populated.



If the XML file content is not displayed properly, click **Format XML**.

7. Click **Add to XML placeholder list**.

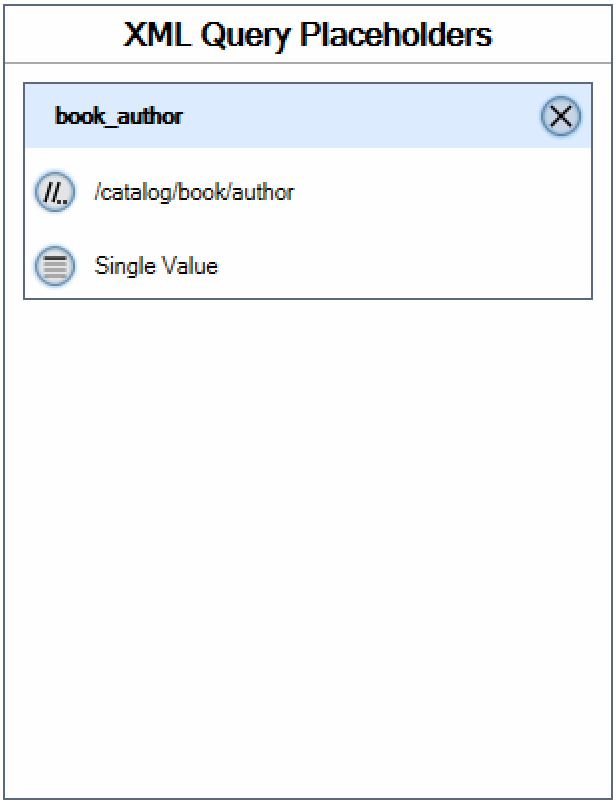
8. The **Insert the result as** drop-down list is displayed.



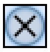
9. Select one of the following options to determine how the results of your query should be displayed:
    - **Single Value** - Select to insert the first value returned by the XPath query on the document.
    - **Image** - Select to insert the results of the query as an image. The results of the query must be encoded using Base64 encoding and must be an image format that can be inserted into a Word document.
    - **List** - Select to insert the results of the query as a list. All content from the top level nodes returned by the XPath query is inserted as a list embedded on the document. This Placeholder appears on the document like other Placeholders. Any list formatting that is applied to the Placeholder is used after the document is created and the values are inserted in the list.

Note: Outline formatting is not supported.

    - **Table** - Select to insert all the values retrieved by the XPath query as a table embedded on the document. Instances of this Placeholder appear on the document as an empty table. Any column headers entered in the top row of this table are preserved when the values are filled in. Table styles are also preserved.
10. The selected XPath is displayed in the **XML Query Placeholders** list.



To remove the selected XPath from the XML Query Placeholders list, click **Delete**.

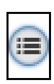
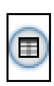


11. If necessary, click **Edit XPath** to edit the selected XPath.

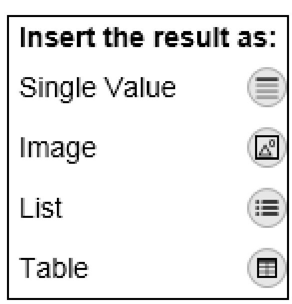
    a. Edit the XPath in the **Selected XPath** field.
    b. Click **Accept** to accept the changes.

    Click **Cancel** to cancel the changes.

12. If necessary, click **Edit Output Style** to edit the select XPath output style.
    a. Depending on the previously selected output style, **Edit Output Style** will appear as one of the following:

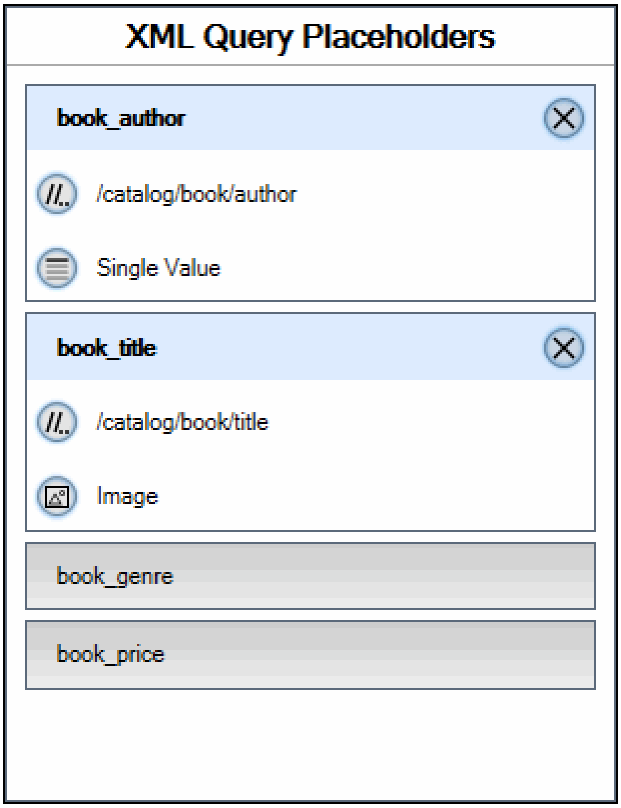
Icon	Output Style
	Single Value
	Image
	List
	Table

    b. The **Insert the result as** drop-down list is displayed.

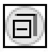


    c. Select an output style.
13. Repeat steps 5 through 12 to create additional XML Query Placeholders.

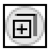
14. In the **XML Query Placeholders** list, click the blue bar to collapse a selected XPath. Click the gray bar to expand a selected XPath.



To collapse all selected XPaths, click **Collapse All**.

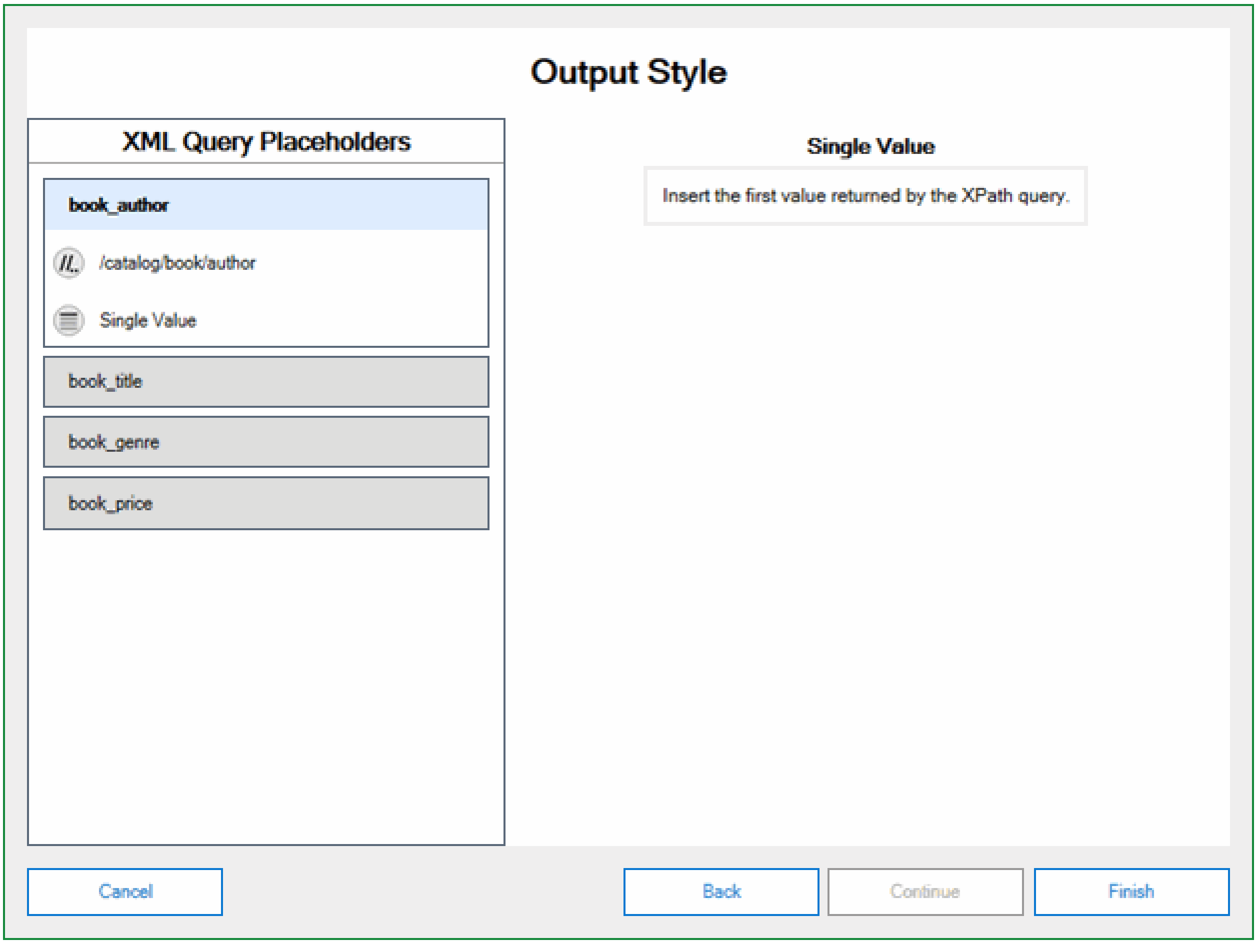


To expand all selected XPaths, click **Expand All**.



15. Click **Continue**.

16. The **Output Style** dialog box is displayed.



17. Click each selected XPath to view an output style summary and configure any additional settings.
    - **Single Value** has no additional settings.
    - **Image** has no additional settings.
    - **List** - If the XPath query result includes a delimiter, type this delimiter in the **Delimiter (Optional)** field.

      For example, if the delimiter is a comma, the XML should be structured as follows:

      `<data><listdata>rowdata1,rowdata2,rowdata3</listdata><data>`

      If the XPath query result does not include a delimiter, row data must be supplied as individual elements. For example:

      `<data><listdata>rowdata1</listdata><listdata>rowdata2</listdata><listdata>rowdata3</listdata></data>`

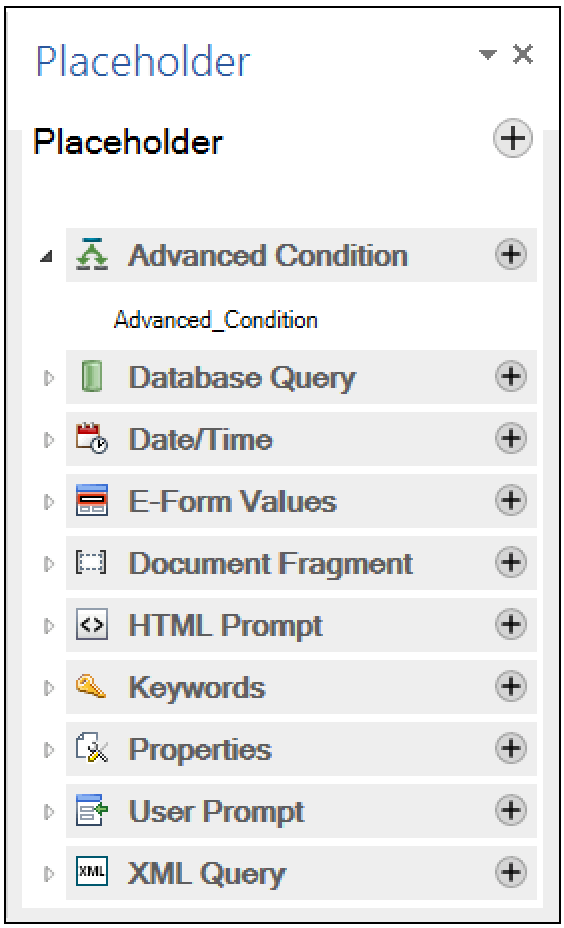
Note: Outline formatting is not supported.

- **Table** - In the **Column Names** field, specify column names as a comma delimited list. These columns should be child or descendant elements to row elements. For example, **column1,column2,column3**. In this example, the XML would be structured as follows:

  ```
  <data><rowdata><column1>data1</column1><column2>data2</
  column2><column3>data3</column3></rowdata></data>
  ```

  When inserting values as a table, elements that are not included in the columns specified in the **Column Names field** are ignored. If a column is not found in a particular row, an empty cell is inserted. If necessary, columns can also be reordered.

18. Click **Finish**.
19. The **Placeholder** pane is displayed and lists all created placeholders, organized by placeholder type. Click the arrow to expand or collapse placeholder types.



Note: Only placeholder types with existing placeholders are listed in the **Placeholder** pane.

To directly create additional Placeholders of a specific type, click **Create New** next to the Placeholder type:

For additional placeholder configuration options, see Editing Placeholders on page 270.

Inserting Placeholders

Placeholders can be inserted into a template as a new blank Placeholder or from an existing Placeholder.

Inserting Existing Placeholders

After a Placeholder has been created, it can be inserted into a template.

To insert an existing Placeholder into a template:

1. Place the cursor where the Placeholder should be inserted.
2. On the **Placeholder** pane, expand a Placeholder type and select a Placeholder.
3. Click **Insert**.

4. The Placeholder is inserted into the template as:
   `{[Placeholder Name]}`

Note: Inserting Fragment Placeholders into tables is not supported.

5. Apply a font or style to the Placeholder, if necessary, using the Microsoft Word toolbar. Any fonts or styles used for the Placeholder will be used for the value that is inserted in the composed document. If no fonts or styles are applied to the Placeholder, the font and style will be inherited from the character prior to the Placeholder. If there are no characters prior to the Placeholder, the font and style will be inherited from the character following the Placeholder.
6. Click **Save Template**.

Note: When you insert a placeholder formatted as a table, adjust the number of columns as needed. By default, the placeholder will be inserted with five columns. If the template needs to display more columns, increase the number of columns as needed.

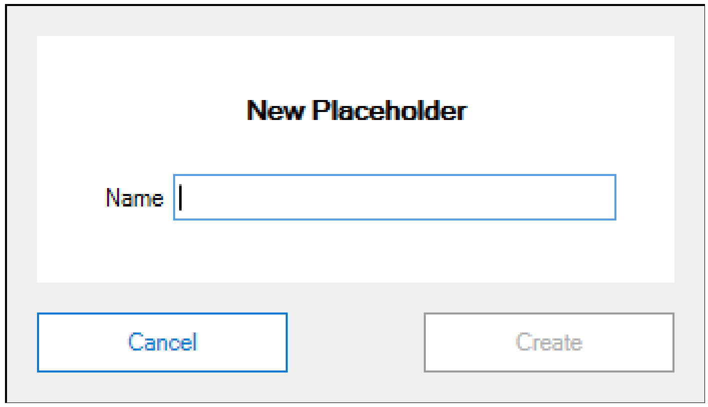
Inserting Blank Placeholders

Blank Placeholders are unconfigured upon creation and are listed under **Unconfigured** in the **Placeholder** pane. Unconfigured Placeholders are placed on every document that uses the specified template. For testing purposes, Unconfigured Placeholders can be set to a default value.

To insert a new blank Placeholder into a template:

1. Place the cursor where the Placeholder should be inserted.
2. On the **Template Builder** ribbon, click **Insert Blank**.

3. The **New Placeholder** dialog box is displayed. Type a name for the placeholder in the **Name** field, and click **Create**.

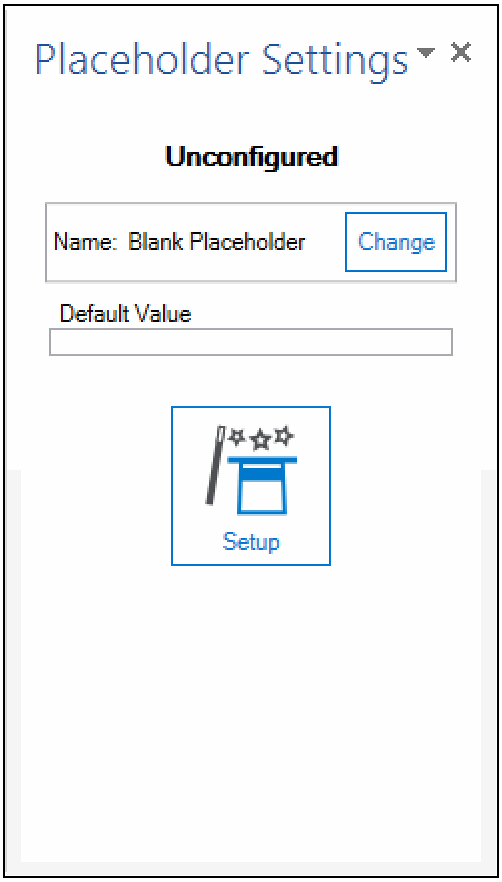


Note the following:

- This field is limited to 80 characters.
- Each placeholder name within the same template must be unique.
- The following characters should not be used in the name of a placeholder that is used in a SQL query: & (ampersand), " " (quotation marks), ' ' (single quotes), < > (carats). When a Placeholder name contains any of these characters and is used in a SQL query, no data is returned for that query.

4. The Unconfigured Placeholder is inserted into the template as: `{[Placeholder Name]}`

5. The **Placeholder Settings** pane is displayed.



6. To change the name of the Placeholder, click **Change** and type a new name in the **Placeholder Name** dialog box.
7. To set a default value for the Placeholder, type the value in the **Default Value** field.

Note: Unconfigured Placeholders with a Default Value should only be used for testing.

8. Click **Save Template**.

Configuring Blank Placeholders

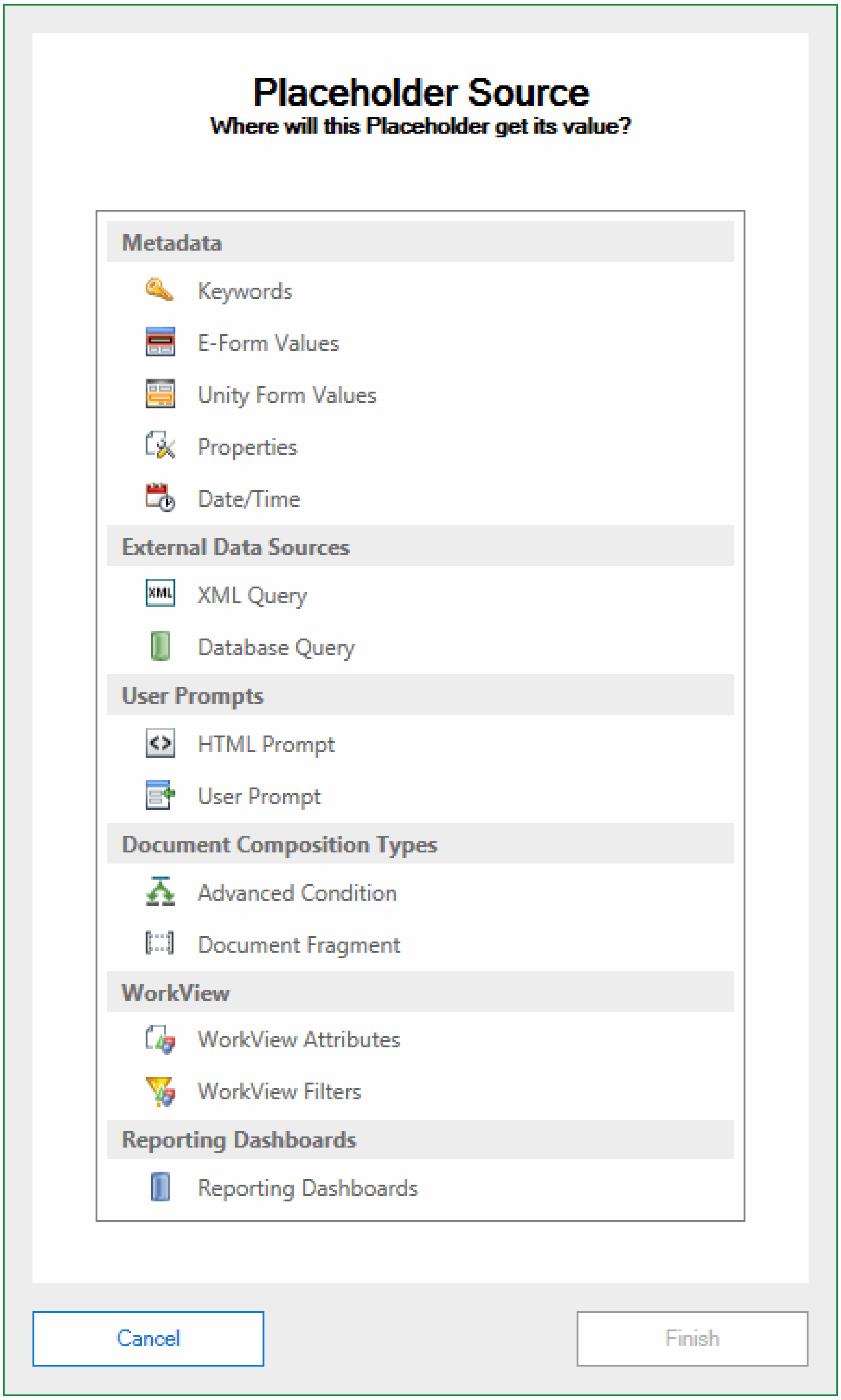
After a blank Placeholder has been inserted, it can be configured as a Placeholder type.

To configure an existing Unconfigured Placeholder:

1. On the **Placeholder** pane, expand **Unconfigured** and select the Unconfigured Placeholder.
2. Click **Edit**.

3. Click **Setup**.

4. The **Placeholder Source** dialog box is displayed.



5. Select **XML Query**.

Note: The Placeholder source of Unconfigured Placeholders cannot be changed once it has been selected. To use a different Placeholder source, insert a new blank Placeholder.

6. Select **XML Path (from script)**.
7. Type the XPath in the **Enter XPath** field, and click **Continue**.
8. Select an output style. See the descriptions of output styles under step 9 of Creating Placeholders.
9. Click **Finish**.
10. Click **Save Template**.

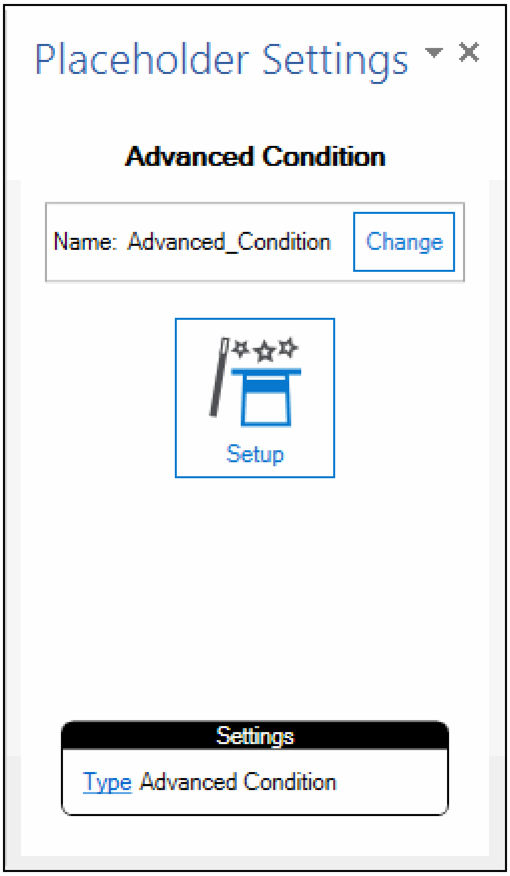
Editing Placeholders

Placeholders that have been created and configured can be edited.

To edit a Placeholder:

1. If the Placeholder has already been added to the template, click the Placeholder, and skip to step 6.
2. If the Placeholder has not yet been added to the template, on the **Placeholder** pane, expand the Placeholder type and select the Placeholder.
3. Click **Edit**.

4. The **Placeholder Settings** pane is displayed.



5. To change the name of the Placeholder, click **Change** and type a new name in the **Placeholder Name** dialog box.
6. On the **Placeholder Settings** pane, click **Setup** to edit all settings, or click the appropriate hyperlink in the **Settings** section to edit the following settings:

Hyperlink	Description
XPath	Click to edit the XPath configured for the Placeholder.
Style	Click to edit the way the Placeholder's database query, filter, or XPath query results will be displayed. For more information on configuring Placeholder value Style, see step 9 under Creating Placeholders on page 257.
Editable	Click to edit the restrictions for editing the Placeholder during preview. **Note:** The **Editable** hyperlink is only available when **Restrict Edit Preview Settings to Select Placeholder Values** is selected on the **General Settings** dialog box from the **Template Options** pane.

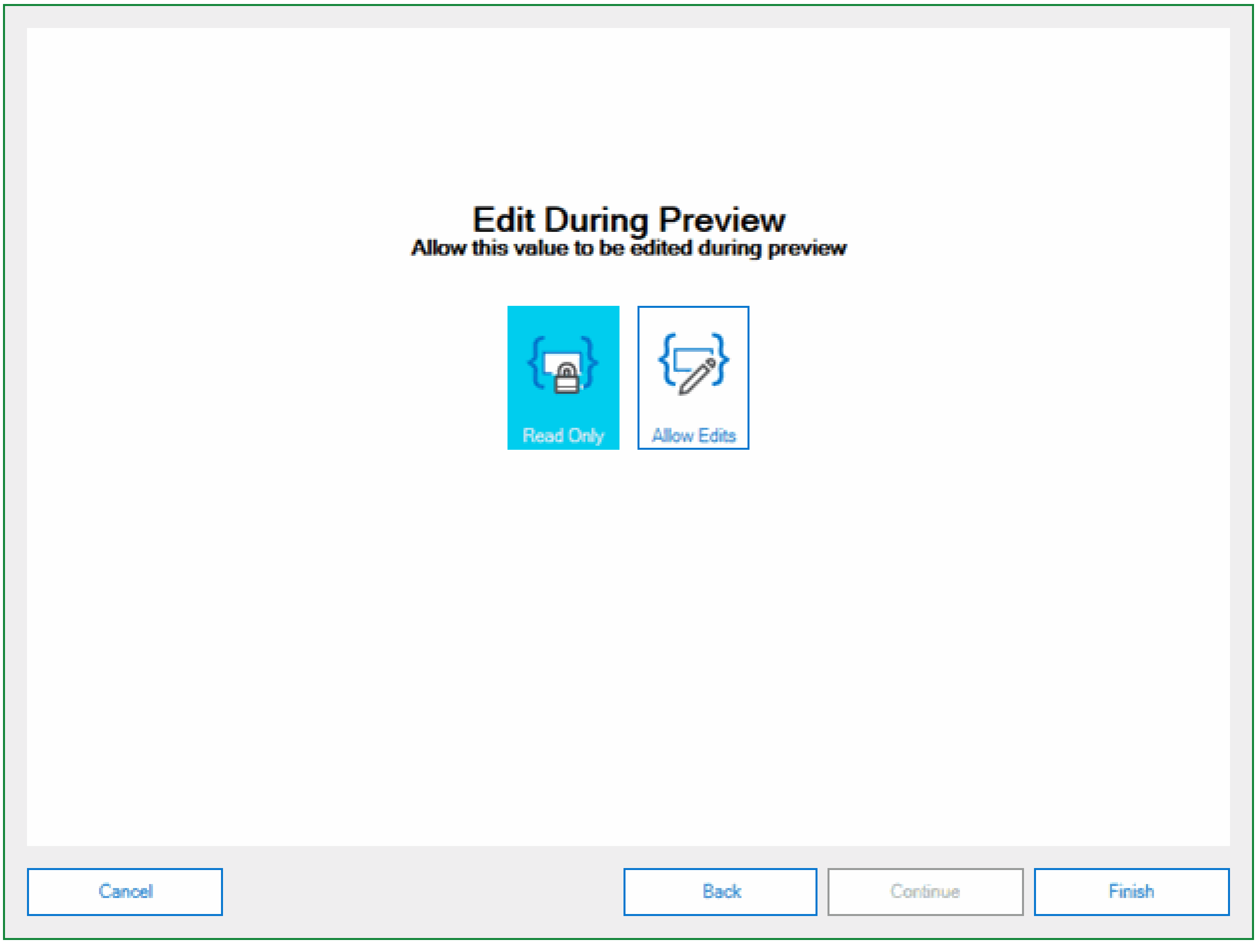
Hyperlink	Description
Formatting	Click to edit the Placeholder's formatting. See Configuring Display Style on page 274 for more information on Placeholder formatting.
Case	Click to edit the Placeholder's case. See Configuring Case Correction on page 281 for more information on Placeholder case.
Output	Click to edit the Placeholder's output. See Configuring Keyword Mapping on page 282 for more information on Placeholder output.

7. If the Placeholder being edited is an XML Query with the output style **Insert the results as a table**, the **Keygroup Mapping** dialog box is displayed. See Configuring Keygroup Mapping on page 283 for more information on Keygroup mapping.
8. Click **Finish**.
9. Click **Conditions** to edit any configured conditions, or create a new condition. See Configuring Conditions on page 285 for more information on configuring conditions.
10. Click **Save Template**.

Configuring Edit During Preview

When **Restrict Edit Preview Settings to Select Placeholder Values** is selected on the **General Settings** dialog box from the **Template Options** pane, editing Placeholder values during preview can be restricted on the **Edit During Preview** dialog box.

The **Edit During Preview** dialog box is accessed through the **Setup** button or the **Editable** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure editing a Placeholder during preview:

1. On the **Edit During Preview** dialog box, select one of the following options:

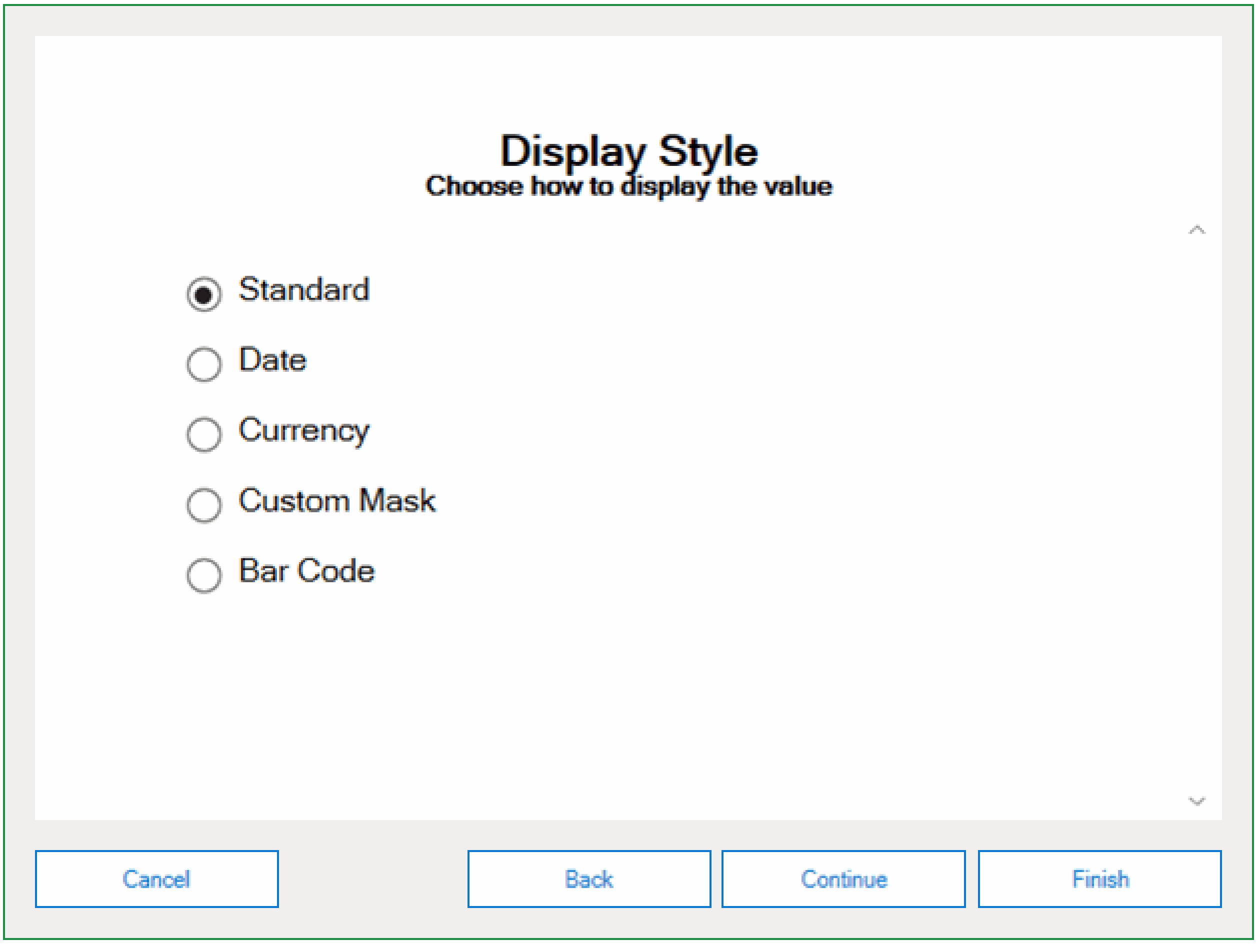
Option	Description
Read Only	Select to allow users to view, but not edit the Placeholder value during preview.
Allow Edits	Select to allow users to edit the Placeholder value during preview.

2. Click **Finish**.
3. Click **Save Template**.

Configuring Display Style

Placeholder values can be configured to display with specific formatting. Formatting can be configured for XML Query placeholders that use the following output style: **Insert the first value returned by the XPath query**.

The **Display Style** dialog box is accessed through the **Setup** button or the **Formatting** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure display style options from the **Display Style** dialog box, see the following:

- Standard Display Style on page 274
- Date Display Style on page 275
- Currency Display Style on page 278
- Custom Mask Display Style on page 279
- Bar Code Display Style on page 280

Standard Display Style

Standard display style applies no formatting to the Placeholder value.

To configure Standard display style:

1. On the **Display Style** dialog box, select **Standard**.
2. Click **Finish**.
3. Click **Save Template**.

Date Display Style

Date display style applies a date/time format to the Placeholder value.

To configure Date display style:

1. On the **Display Style** dialog box, select **Date**.
2. Select a date format from the **Please Select a Date Format** drop-down list:
   - **<Custom>** - The date/time in a new date/time format. For configuration of custom date formats, see Custom Date Display Style on page 275.
   - **Short Date** - The date in **M/d/yyyy** format. For example, 1/23/2016.
   - **Long Date** - The date in **dddd, MMMM d, yyyy** format. For example, Saturday, January 23, 2016.
   - **Time** - The time in **h:mm tt** format. For example, 4:56 PM.
   - **General Date/Time** - The date and time in **M/d/yyyy h:mm t** format. For example, 1/23/2016 4:56 PM.
   - **Full Date/Time** - The date in **dddd, MMMM d, yyyy h:mm t** format. For example, Saturday, January 23, 2016 4:56 PM.
   - **Month and Day** - The date in **MMMM d** format. For example, January 23.
   - **Month and Year** - The date in **MMMM, yyyy** format. For example, January, 2016.

Note: Any existing custom date formats are displayed at the bottom of the **Please Select a Date Format** drop-down list, and can be removed by hovering and clicking **Remove** on the right side of the custom date format name.

3. Click the **set input format** hyperlink to specify the format of the input value from which the Placeholder value is populated.
4. Select a date format as described in step 2. Select **<None>** if users will enter varied date/time formats. OnBase will interpret the format.

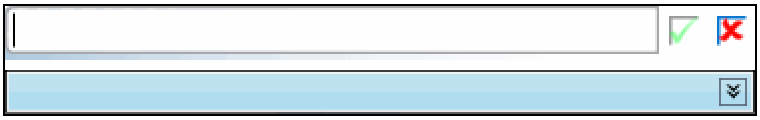
Tip: Unless a specific date/time format is used for every input, selecting **<None>** is recommended. The formatting will fail if the date/time is not entered in the specified format.

5. Click **Finish**.
6. Click **Save Template**.

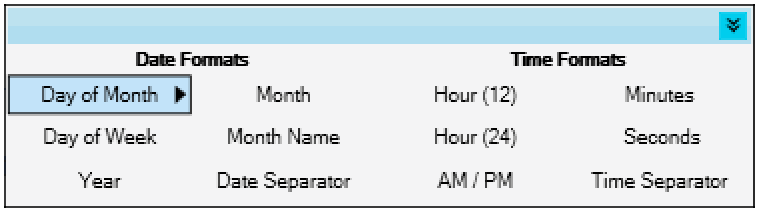
Custom Date Display Style

1. On the **Display Style** dialog box, select **Date**.
2. Select **<Custom>** from the **Please Select a Date Format** drop-down list.

3. The custom date format field is displayed.



4. Type a date format or click **Show/Hide Date Format Tools** to select components from the date format tools drop-down.



Note: At least two characters must be entered for any **<Custom>** format. Custom date formats use standard date and time strings. For more information, see Custom Date and Time Format Strings on the Microsoft MSDN site.

   a. Click a format component to insert the corresponding formatting in the custom date format field or expand additional options, if available.

Date Formats	Description
Day of Month	Select to expand the following: • **Day of Month (1-31)** - Inserts **d** • **Day of Month (01-31)** - Inserts **dd**
Day of Week	Select to expand the following: • **Day of Week** - Inserts **dddd** • **Abbreviated Day of Week** - Inserts **ddd**
Year	Select to expand the following: • **Two Digit Year** - Inserts **yy** • **Four Digit Year** - Inserts **yyyy**
Month	Select to expand the following: • **Month (1-12)** - Inserts **M** • **Month (01-12)** - Inserts **MM**
Month Name	Select to expand the following: • **Month Name** - Inserts **MMMM** • **Abbreviated Month Name** - Inserts **MMM**
Date Separator	Inserts **/**

Time Formats	Description
Hour (12)	Select to expand the following: • **Hour (1-12)** - Inserts **h** • **Hour (01-12)** - Inserts **hh**

Time Formats	Description
Hour (24)	Select to expand the following: • **Hour (0-23)** - Inserts **H** • **Hour (00-23)** - Inserts **HH**
AM/PM	Inserts **tt**
Minutes	Inserts **mm**
Seconds	Inserts **ss**
Time Separator	Inserts **:**

Tip: When the cursor is placed in the custom date format field, a preview of the custom date format is populated on the blue bar below the field.

Note: Spaces and characters that are not used as format specifiers can be inserted between format components. This excludes the characters inserted by the date format tools components, as well as **f**, **F**, **g**, **K**, **z**, and **%**. Any character can be inserted when it is enclosed in a pair of ' or ". For example, **'M'** or **"M"**. For more information, see Custom Date and Time Format Strings on the Microsoft MSDN site.

5. Click **OK** to save, or click **Cancel** to return to the **Display Style** dialog box.

Currency Display Style

Currency display style applies a currency format to the Placeholder value.

To configure Currency display style:

1. On the **Display Style** dialog box, select **Currency**.
2. Select a currency format from the **-None-** drop-down list, which include **US Currency** and any configured Currency data type Keyword Types.

Note: A currency format other than **-None-** must be selected.

Note: For more information on creating and configuring currency formats, see the System Administration help file or module reference guide.

3. Click the **set input format** hyperlink to specify the format of the input value from which the Placeholder value is populated.
4. Select a currency format as described in step 2. Select **-None-** if users will enter varied currency formats. OnBase will interpret the format.

Tip: Unless a specific currency format is used for every input, selecting **-None-** is recommended. The formatting will fail if the value is not entered in the specified format.

5. Click **Finish**.
6. Click **Save Template**.

Custom Mask Display Style

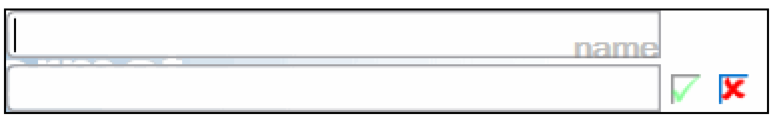
Custom Mask display style applies a custom mask format to the Placeholder value.

To configure Custom Mask display style:

1. On the **Display Style** dialog box, select **Custom Mask**.
2. From the **Please Select a Mask Format** drop-down list, select a mask format or select **<Create New Mask>** to create a new mask format.

   To create a new mask format:

   a. From the **Please Select a Mask Format** drop-down list, select **<Create New Mask>**.
   b. The **name** field and custom mask format field are displayed.

   c. Type a name for the custom mask format in the **name** field.
   d. Type a mask format, using a space where input characters are placed. Typed spaces are displayed as a light gray x.
   e. Click **OK** to save, or click **Cancel** to return to the **Display Style** dialog box.

Note: The **Ignore Punctuation** option is no longer used.

   f. To edit the custom mask format, click **Edit Mask**.

Note: Any existing custom mask formats are displayed at the bottom of the **Please Select a Mask Format** drop-down list, and can be removed by hovering and clicking **Remove** on the right side of the custom mask format name.

Note: Custom Masks can only be deleted by users that are licensed for Document Composition and have Document Composition Administration privileges.

3. Click **Finish**.
4. Click **Save Template**.

Bar Code Display Style

Bar Code display style applies a bar code format to the Placeholder value. This allows Placeholder values to be displayed as bar code images.

Note: It is considered a best practice to familiarize yourself with a bar code standard before using it as a display format. For example, ensure the selected bar code type is compatible with potential Placeholder values. Each bar code type adheres to a specific character set.

To configure Bar Code display style:

1. On the **Display Style** dialog box, select **Bar Code**.
2. From the **Please select a Bar Code Format** drop-down list, select a bar code format from the following:
   - **Code 3 of 9**

Note: The following characters are valid for a Placeholder using the **Code 3 of 9** bar code Display Style: **A-Z**, **0-9**, **-**, **+**, **.**, **$**, **/**, **%**, and spaces. Invalid characters are removed from the Placeholder value when the template is composed.

   - **Code 128**
   - **Data Matrix**
   - **EAN-128**
   - **PDF417**
   - **QR code**

   When **Code 3 of 9**, **Code 128**, **EAN-128**, or **PDF417** is selected:

   a. Click **Continue**.
   b. Enter the appropriate **Width** and **Height** values for the bar code image in pixels. Values must be between 2 and 1,500.

      By default, **Auto** is displayed in these fields, indicating that the system determines the appropriate width and height at the time of composition.
   c. To prevent the Placeholder value from being displayed with the bar code, select **Hide Barcode Text**.

      By default, the Placeholder value is displayed with the bar code.

Note: The **Hide Bar Code Text** option does not apply to PDF417 bar codes. These bar codes do not have the option to include text.

   When **Data Matrix** or **QR code** is selected:

   a. Click **Continue**.
   b. Enter the appropriate **Height & Width** for the bar code image in pixels. The value must be between 2 and 1,500. The value is applied to both the width and height, as these bar code formats are square in shape.

      By default, **Auto** is displayed in this field, indicating that the system determines the appropriate width and height at the time of composition.

3. Click **Finish**.
4. Click **Save Template**.

Configuring Case Correction

Templates pull data from many different data sources, which may not store data consistently with regard to text case. To ensure consistency and readability, text case formatting options are available.

The **Case Correction** dialog box is accessed through the **Setup** button or the **Case** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.

To configure case correction:

1. On the **Case Correction** dialog box, select one of the following options:

Option	Description
(no correction)	No case correction will be applied.

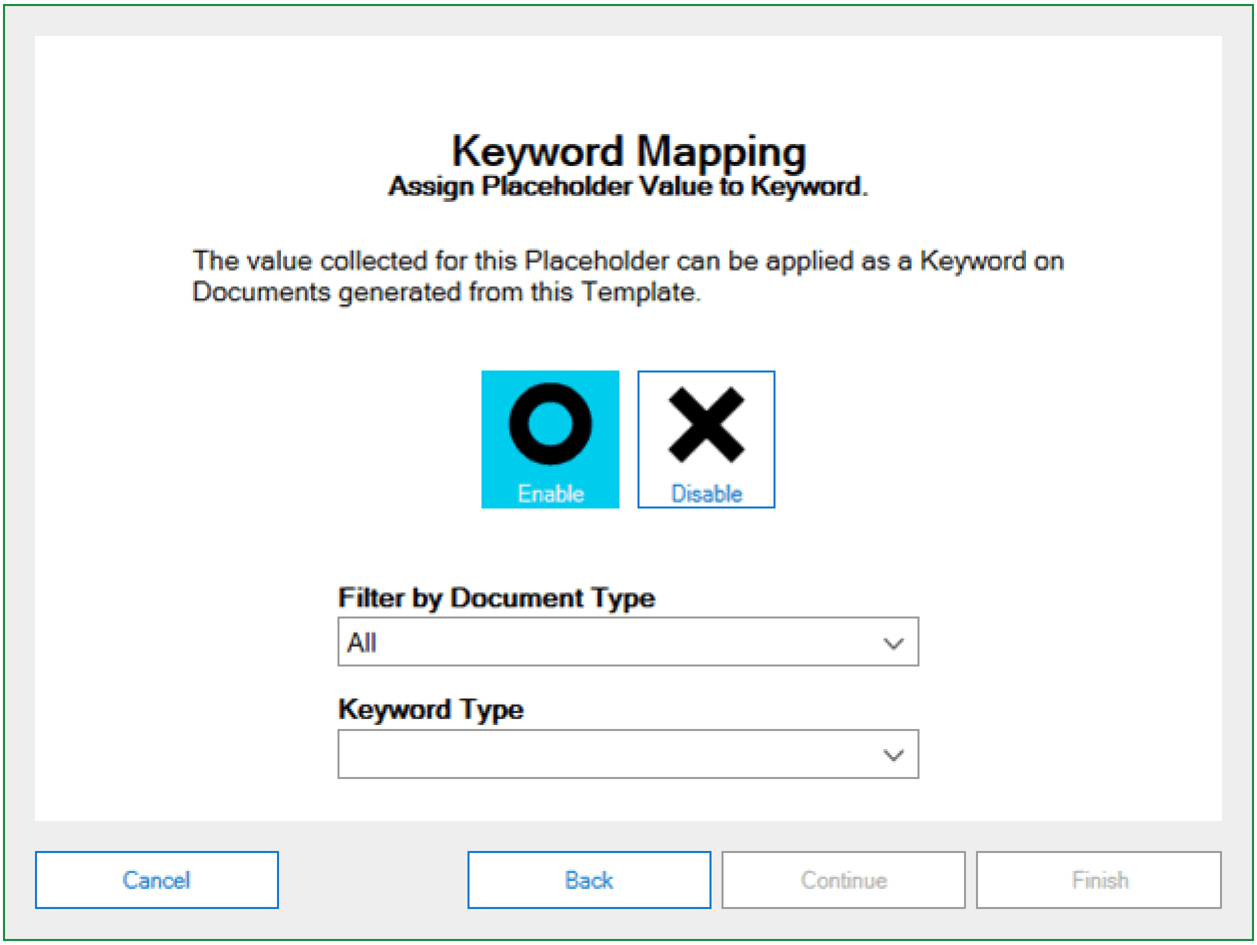
Option	Description
Proper Noun	Proper nouns will be capitalized.
lowercase	All text will be in all lower case letters.
UPPERCASE	All text will be in all upper case letters.

2. Click **Finish**.
3. Click **Save Template**.

Configuring Keyword Mapping

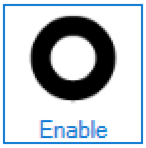
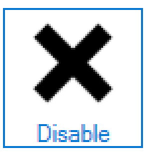
A Placeholder value can be used as a Keyword value on documents composed from a template by using Keyword Mapping.

The **Keyword Mapping** dialog box is accessed through the **Setup** button or the **Output** hyperlink on the **Placeholder Settings** pane of a selected Placeholder.



To configure case correction:

1. On the **Keyword Mapping** dialog box, select one of the following options:

Option	Description
Enable 	Click to assign the Placeholder value as a Keyword Value on the composed document. Select a Document Type from the **Filter by Document Type** drop-down list. Select a Keyword Type from the **Keyword Type** drop-down list. **Caution:** When mapping to a Keyword Type, ensure the configured data type and maximum length of the Keyword Type can accommodate incoming values. Values that do not match the data type of the Keyword Type are not added to the document. Values exceeding the maximum number of allowed characters are truncated.
Disable 	Click if you do not want to assign the Placeholder value as a Keyword Value on the composed document.

Caution: It is strongly recommended you do not map a value to a Keyword Type that is part of a Multi-Instance Keyword Type Group, especially when the import dialog is disabled for the template you are configuring. When mapping a value to a Keyword Type that is part of a Multi-Instance Keyword Type Group, and that Multi-Instance Keyword Type Group is contained in the Document Type used to archive composed documents, a separate instance of the Multi-Instance Keyword Type Group is created to contain the value when a document is composed (i.e., the value is not included as part of the initial Multi-Instance Keyword Type Group on the document).

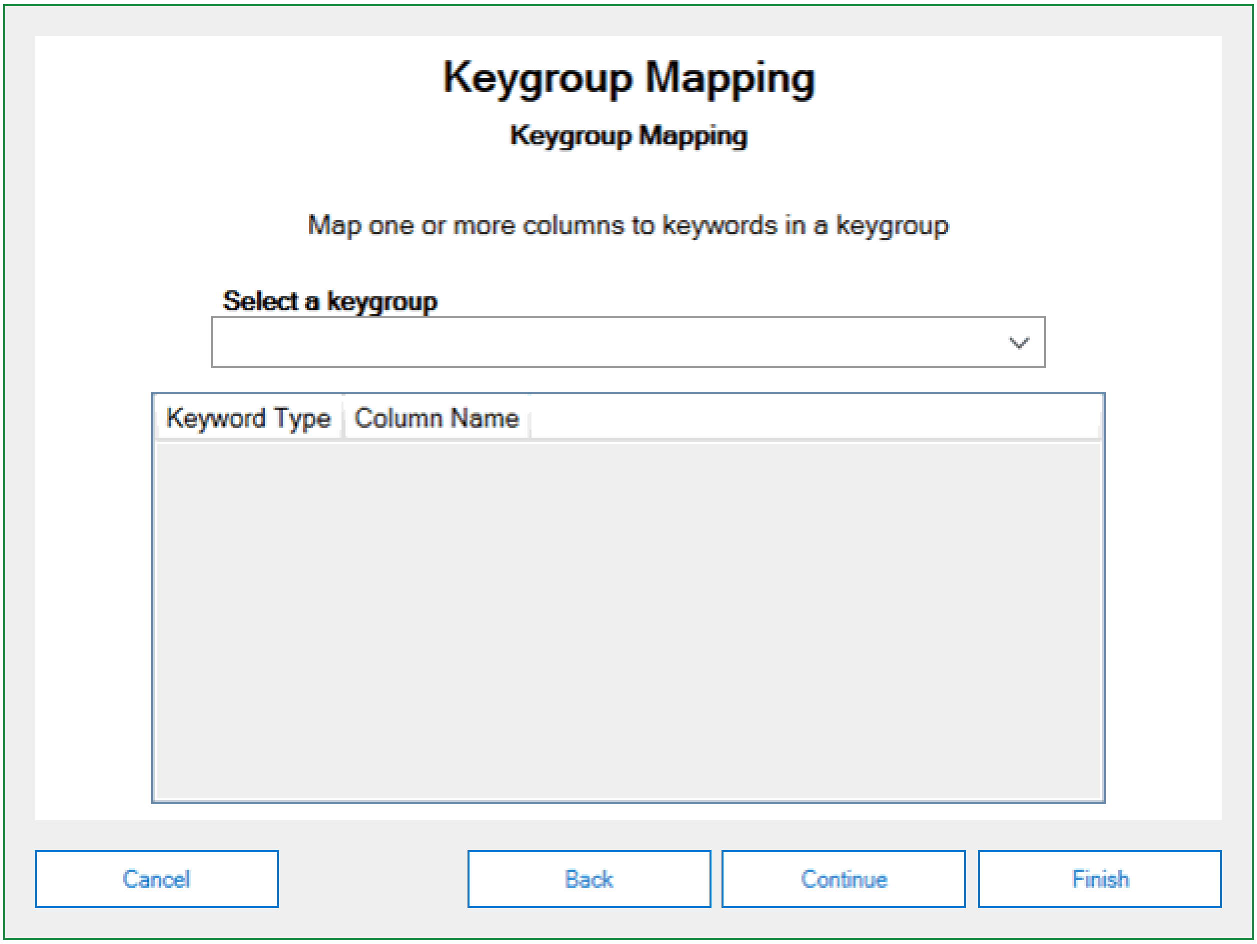
Note: Multiple instances of a single Keyword Type will be displayed in the **Import** pane. If these are duplicate instances, then only a single instance will be saved on the composed document. If the instances differ, both instances will be saved. If a template is configured to **Inherit Keywords from Source Document when possible**, and another Keyword Value is mapped to the same Keyword Type, both Keyword Values will be displayed in the **Import** pane.

2. Click **Finish**.
3. Click **Save Template**.

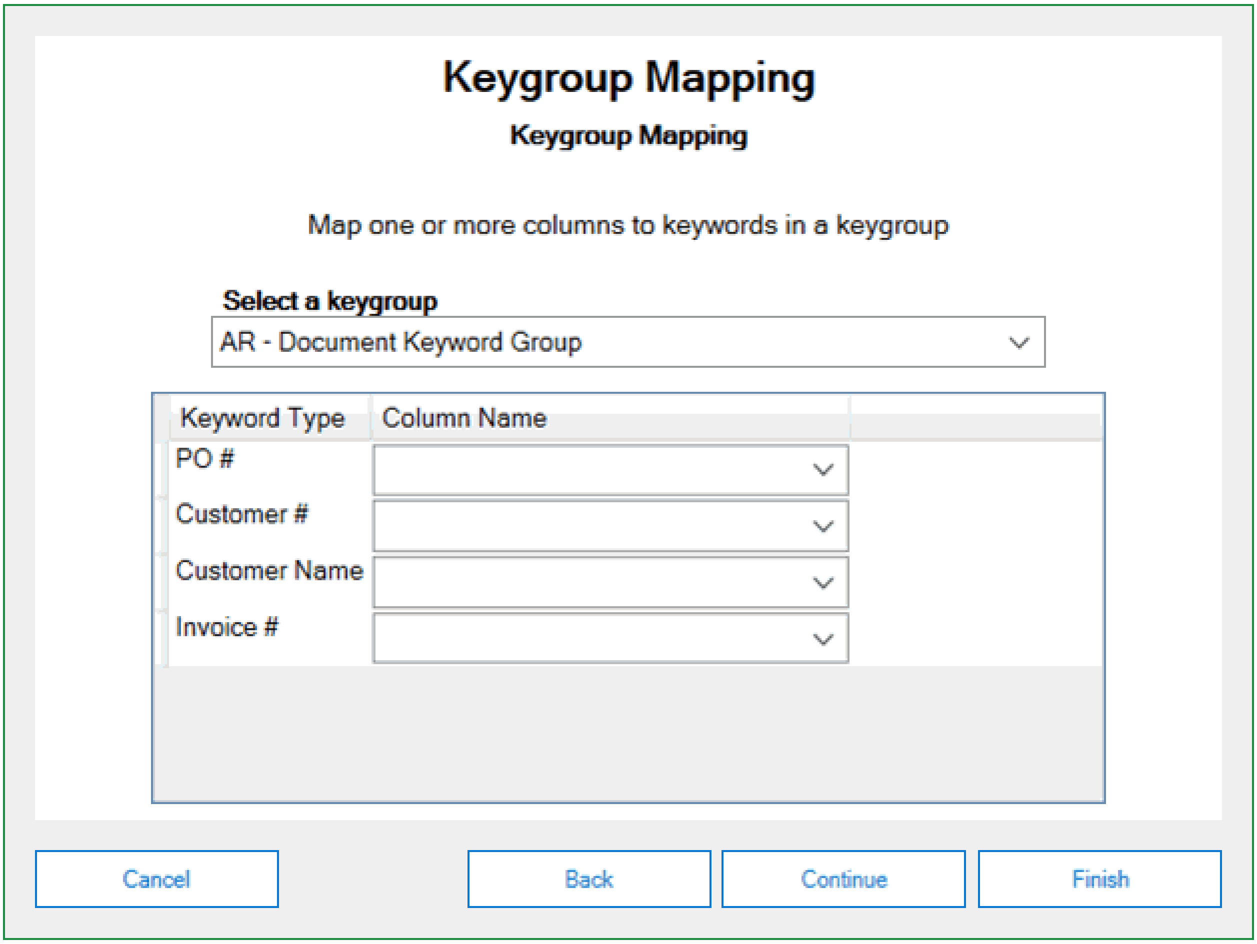
Configuring Keygroup Mapping

Values from XML Path Placeholders configured to **Insert the results as a table** can be mapped to keywords in a Keyword Type Group or Multi-Instance Keyword Type Group.

You can map column names to keywords in a Keyword Type Group or Multi-Instance Keyword Type Group using the **Keygroup Mapping** dialog box:



1. From the **Select a keygroup** drop-down list, select a Keyword Type Group or Multi-Instance Keyword Type Group.
2. The Keyword Types in the Keyword Type Group or Multi-Instance Keyword Type Group are displayed in the **Keyword Type** column:



3. For each Keyword Type, select the column that will provide this value from the corresponding drop-down list.
4. Click **Finish**.

Configuring Conditions

Note: The information below applies only to Release of Information when configuring rejection letters. It does not apply to Release of Information (Integrated Mode).

After a Placeholder is created and configured, you can set up a condition to determine the Placeholder value that will be inserted on the document.

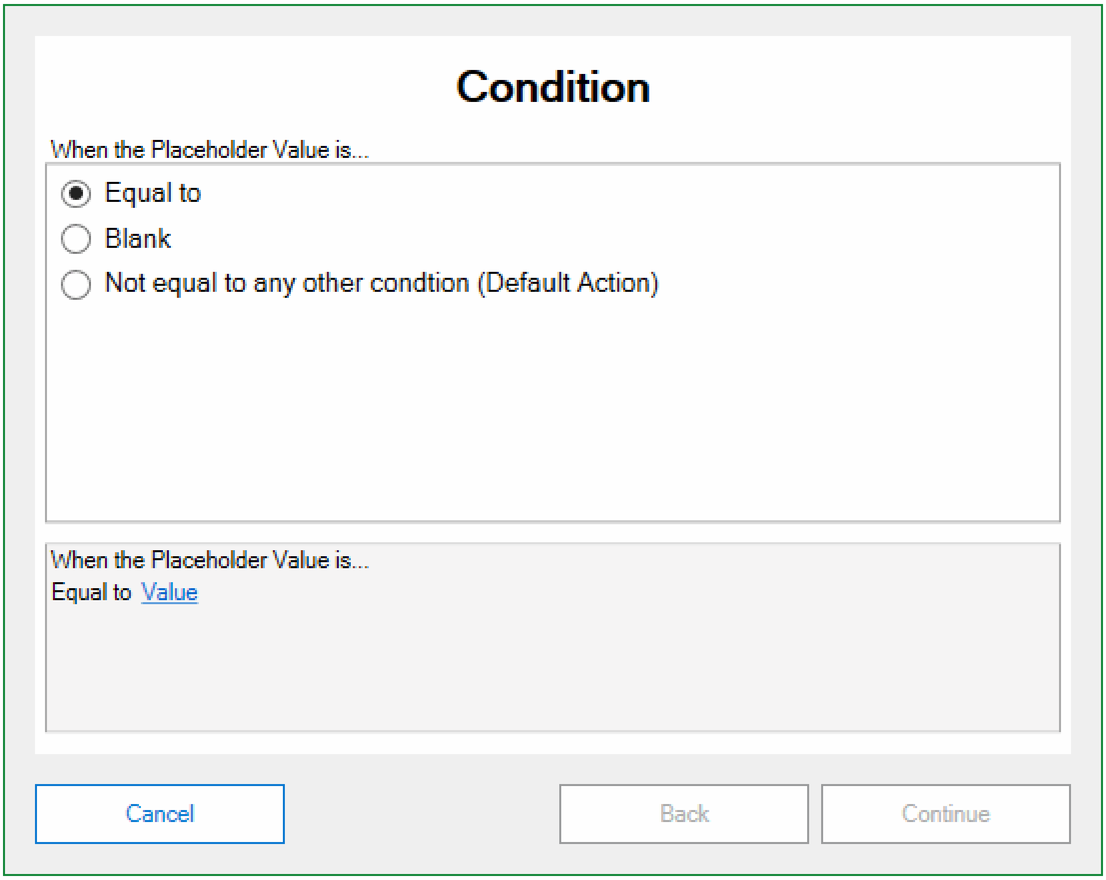
For example, a Loans Department handles documents that contain a **Status** Keyword Type. The two available Keyword Values are **Denied** or **Accepted**. When this Keyword Value is indexed, a Keyword Placeholder can be configured to pull the Keyword Values from the source document. You can configure conditions for the Keyword Placeholder based on the Keyword Values. This allows for a value to be inserted into the document, depending on which Keyword Value is found. Templates can also be inserted into the document. You could configure the condition so that when a document contains the **Accepted** Keyword Value, a congratulatory template would be inserted upon document creation.

To configure a condition for a Placeholder:

1. From the **Placeholder Settings** pane, click **Conditions**.
2. The **Conditions** dialog box is displayed:

3. Click **New Condition**.

4. The **Condition** dialog box is displayed:

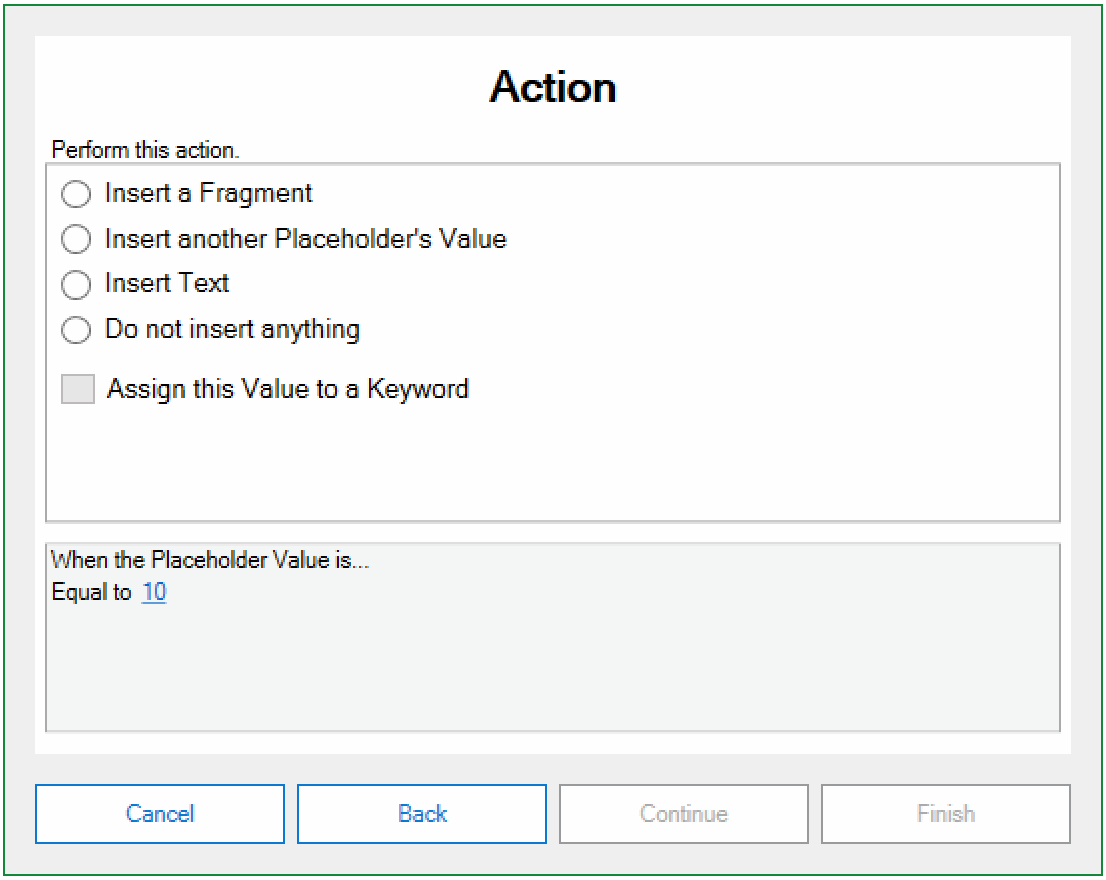


5. Select one of the following options:

Option	Description
Equal to	Select if the Placeholder value will be equal to a value. Click the **Value** hyperlink to specify a value in the **Equal to** screen. Values are limited to 127 characters. **Note:** If you are configuring a date condition, the date format of the **Equal to** value must match the date format of the Placeholder.
Blank	Select if the Placeholder value will be blank.
Not equal to any other condition	Select if the Placeholder value will not be equal to any other condition.

6. Click **Continue**.

7. The **Action** dialog box is displayed:



8. Select one of the following options:

Option	Description
Insert a Fragment	Select to insert a fragment or template. **Note:** Placeholders that are formatted to display as bar code images only output the value when inserting a fragment or template. The bar code image is not generated. **Note:** Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer". Click the **Fragment** hyperlink to select a fragment or template. To filter the list of available fragments and templates, do one or more of the following: • Select the template group the template or fragment resides in from the **Template Group** drop-down list. The list displays only fragments and templates associated with the template group. • Type the name of the fragment or template into the **Fragment** field. The list is filtered as you type. **Tip:** You can type any part of the fragment or template name to yield results. Select the **Match destination style** check box if the text in the fragment should match the font, size, and color of the text that is used in the composed document. When the document is composed, the text in the fragment will inherit the characteristics of the character immediately before the Placeholder. If there is not a character immediately before the Placeholder, the text in the fragment will inherit the characteristics of the character immediately following the Placeholder. If the Placeholder is inserted in a template’s header, it will inherit the default document style. If the template’s default style is not the style used in the rest of the template, select the Placeholder and configure it to match the style used in the rest of the template. If the Placeholder is inserted at the beginning of the document, it will inherit the default document style. If the template’s default style is not the style used in the rest of the template, select the Placeholder and the space immediately following it and configure it to match the style used in the rest of the template.

Option	Description
Insert another Placeholder's Value	Select to insert another Placeholder's value. Click the **Placeholder** hyperlink to select a Placeholder.
Insert Text	Select to insert text. Click the **Text** hyperlink to specify the text to insert. The text value is limited to 127 characters.
Do not insert anything	Select to insert nothing.

9. If you selected the **Insert another Placeholder's Value** or **Insert Text** options, the **Assign this Value to a Keyword** check box is available. Select this check box to assign the inserted Placeholder or text to a keyword. Click the **Keyword** hyperlink to select a Keyword Type using the **Filter by Document Type** and/or **Keyword Type** drop-down lists.
10. Click **Finish**.
11. The condition is added to the **Conditions** dialog box.
12. Repeat steps 3 through 11 to create additional conditions for the Placeholder.

    To edit a condition, select the condition and click **Edit Condition**.

    To delete a condition, select the condition and click **Delete Condition**.

Deleting Placeholders

Placeholders that have been created can be deleted.

To delete a placeholder:

1. On the **Placeholder** pane, expand a Placeholder type and select a Placeholder.
2. Click **Delete**.

3. A dialog box is displayed to confirm deletion. Click **OK** to confirm that you want to delete the Placeholder. Click **Cancel** to retain the Placeholder.

Note: Deleting a Placeholder removes all instances of this Placeholder from the template, whether or not this Placeholder has been added to the template.

4. Click **Save Template**.

Fragments

Note: The information below applies only to Release of Information when configuring rejection letters. It does not apply to Release of Information (Integrated Mode).

Fragments can be created and inserted into document templates. Fragments can be composed of existing text and/or Microsoft Word objects, such as tables, images, bulleted lists, or numbered lists. Empty fragments can also be created. After fragments are saved to OnBase, they can be inserted into other templates by creating new **Document Fragment** Placeholders.

Note: Inserting fragments into tables is not supported.

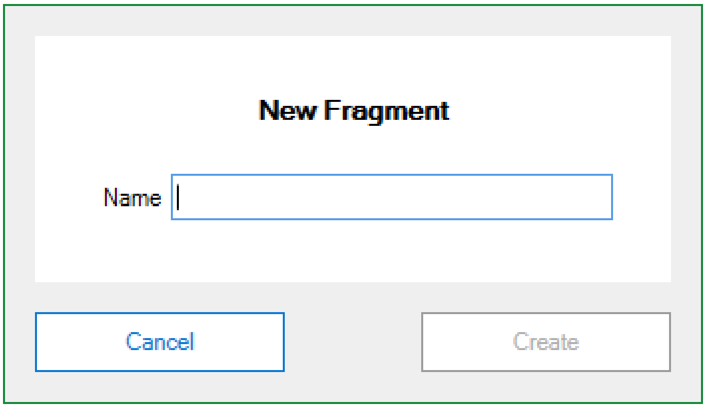
Note: Smart Tags are not supported. Text interpreted by Microsoft Word as a Smart Tag is not copied to the composed document.

Note: When a bullet list style is applied to a fragment, the bullet characters are displayed outside of the fragment.

Creating Document Fragments

To create a new fragment, select existing text and/or a Microsoft Word object if necessary:

1. Click **Create Fragment**.
2. The **New Fragment** dialog box is displayed:



3. Type a name for the fragment and click **Create**.

Note: Fragment names must be unique and are limited to 64 characters.

4. The fragment is displayed on the Word document:

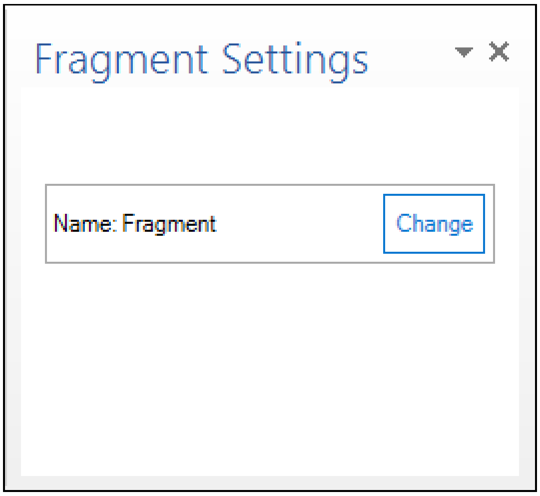
5. If you chose to create an empty fragment, type inside the space to create the fragment. If you created a fragment out of existing text or a Microsoft Word object, this text or object is displayed inside the fragment.
6. Edit the fragment if necessary, ensuring that the fragment is defined on a separate line.
7. Click **Save Template**.

Editing Document Fragments

Fragments that have been created and saved can be edited.

To edit a fragment:

1. Open the template containing the fragment that you want to edit.
2. Click the fragment.
3. The **Fragment Settings** pane is displayed:



4. Click **Change** to modify the fragment’s name in the **Fragment Name** dialog box.

Note: Fragment names must be unique and are limited to 64 characters.

5. Select the fragment and modify the content of the fragment.

Note: Inserting a fragment into itself or any dependent fragments is not supported. For example, fragment "HR - Offer" cannot be inserted into fragment "HR - Offer". Additionally, fragment "HR - Offer" cannot be inserted into fragment "Application Approved" if fragment "Application Approved" is inserted into fragment "HR - Offer".

6. Click **Save Template**.

Deleting Document Fragments

Fragments that have been created and saved can be deleted.

To delete a fragment:

1. Open the template containing the fragment that you want to delete.
2. Select the fragment on the template.
3. Click the fragment's tab:

4. Press the **Delete** key.
5. The fragment is deleted from the template and from OnBase.
6. Click **Save Template**.

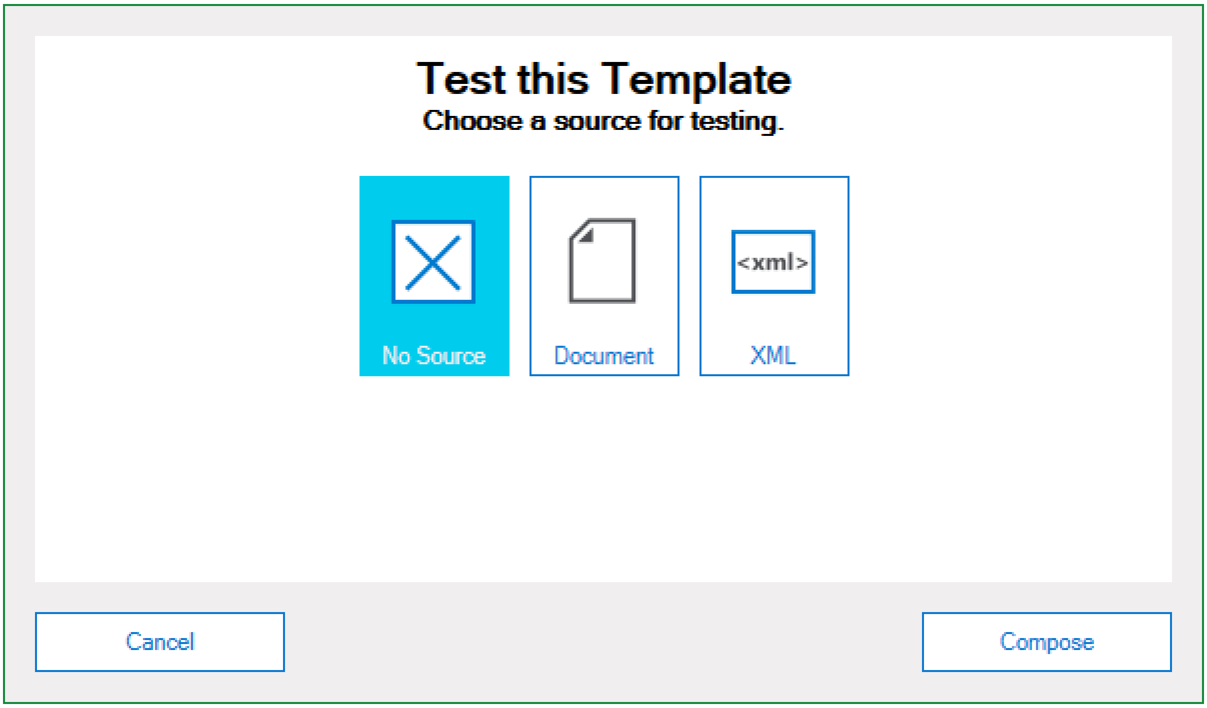
Testing Templates

Once a template has been created, configured, and saved, you can test it to verify that document creation functions correctly. When you test a template, all configuration settings, including User Prompts, are tested.

To test a template:

1. Open the template.
2. Click **Composition Preview**.

   The **Test this Template** dialog box is displayed.



3. Select one of the following:
   - **No Source** - Allows you to test the template as-is with no source document or XML.
   - **Document** - Allows you to test the template against a source document, which in turn can populate Placeholders that reference Keyword Types from the document. For more information on retrieving a source document, see Testing a Template with a Source Document on page 242.
   - **XML** - Allows you to test the template against source XML, which in turn can populate External Source Placeholders that reference XML. For more information on using source XML, see Testing a Template with Source XML on page 244.
4. Click **Finish**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

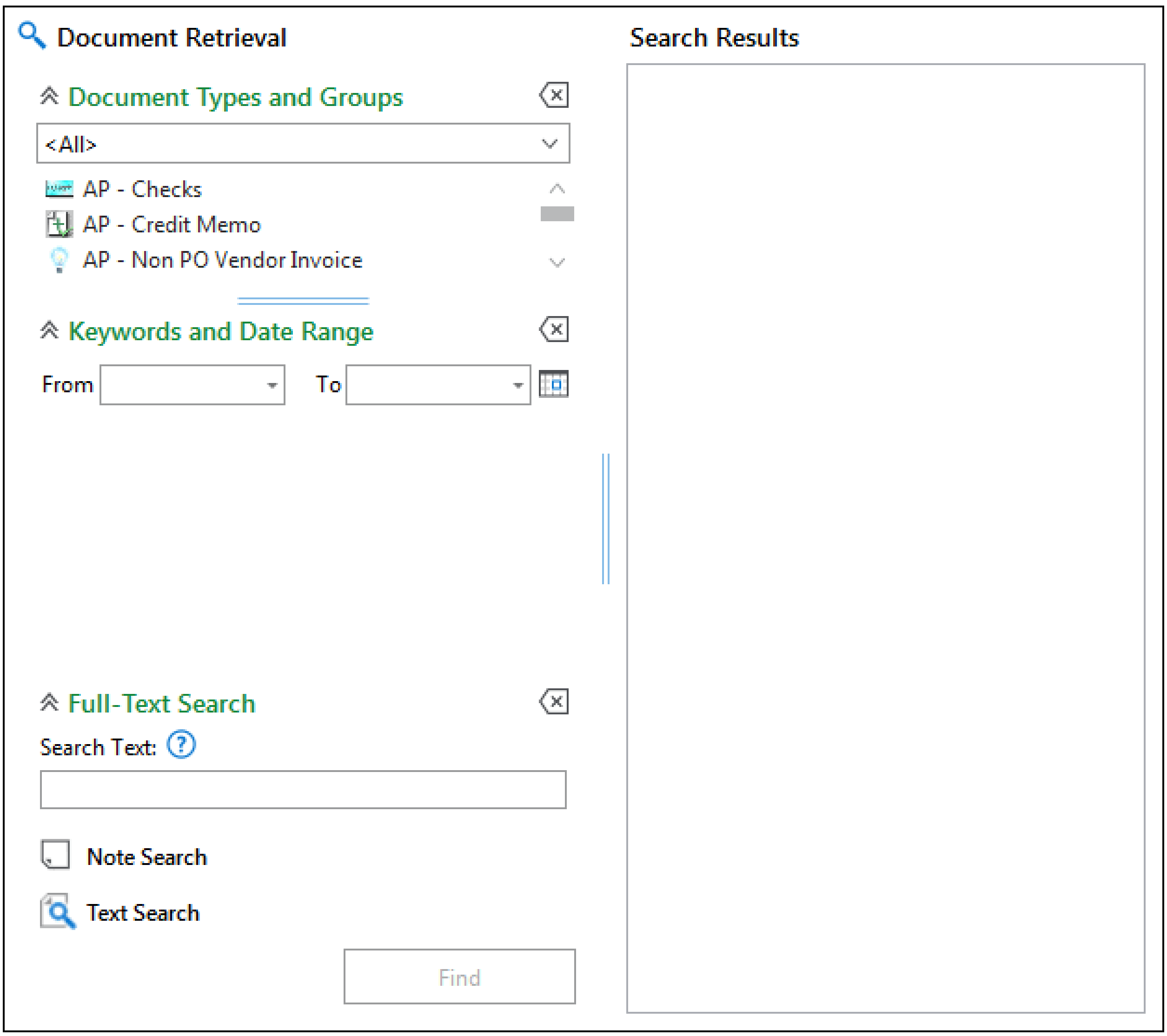
Testing a Template with a Source Document

The previous section describes the basic process for testing a template. To test a template with a source document:

1. From the **Test this Template** dialog box, select **Document** button.

   If a document has already been selected, the **Test this Template** dialog box contains the Auto-Name String of the source document. To use this same source document to test the template, skip to step 4. Click **Change Document** to change the source document that you will use to test the template.

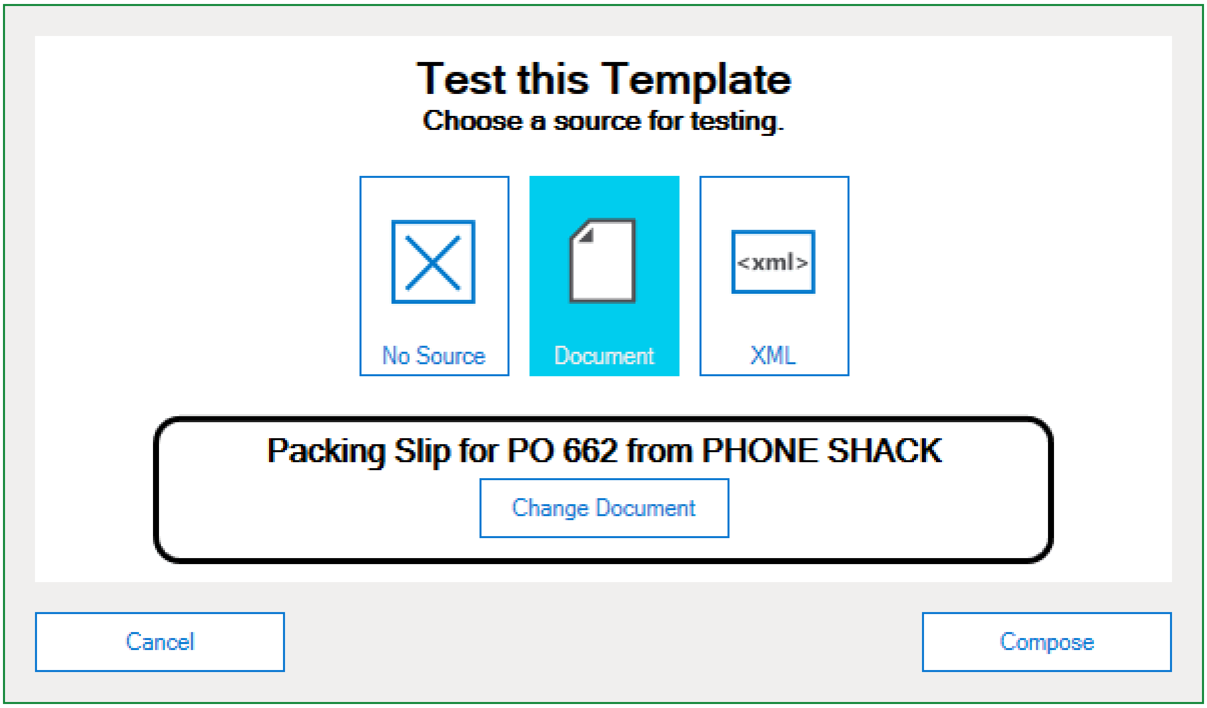
   The **Select Source Document** dialog box is displayed.



2. Retrieve a document to test document creation.

3. Double-click the document.

   The document Auto-Name String is displayed in the **Test this Template** dialog box.



4. Click **Finish**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

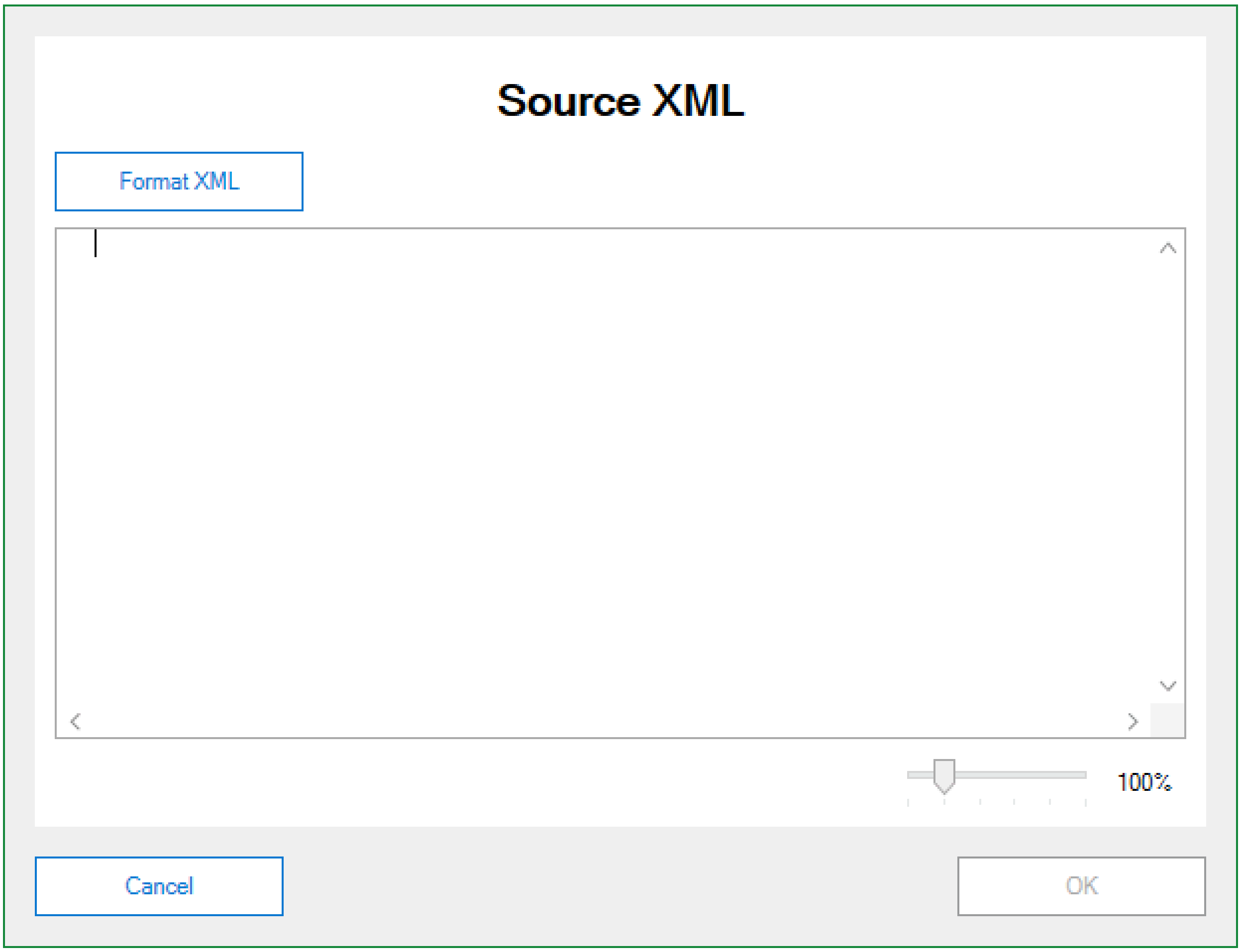
Testing a Template with Source XML

Testing Templates on page 240 describes the basic process for testing a template. To test a template with source XML:

1. From the **Test this Template** dialog box, select **XML** button.

   If source XML has already been entered, the **Test this Template** dialog box indicates XML source text is set. To use this same source XML to test the template, skip to step 5. Click **Edit Source** to change the source XML that you will use to test the template.

   The **Source XML** dialog box is displayed.



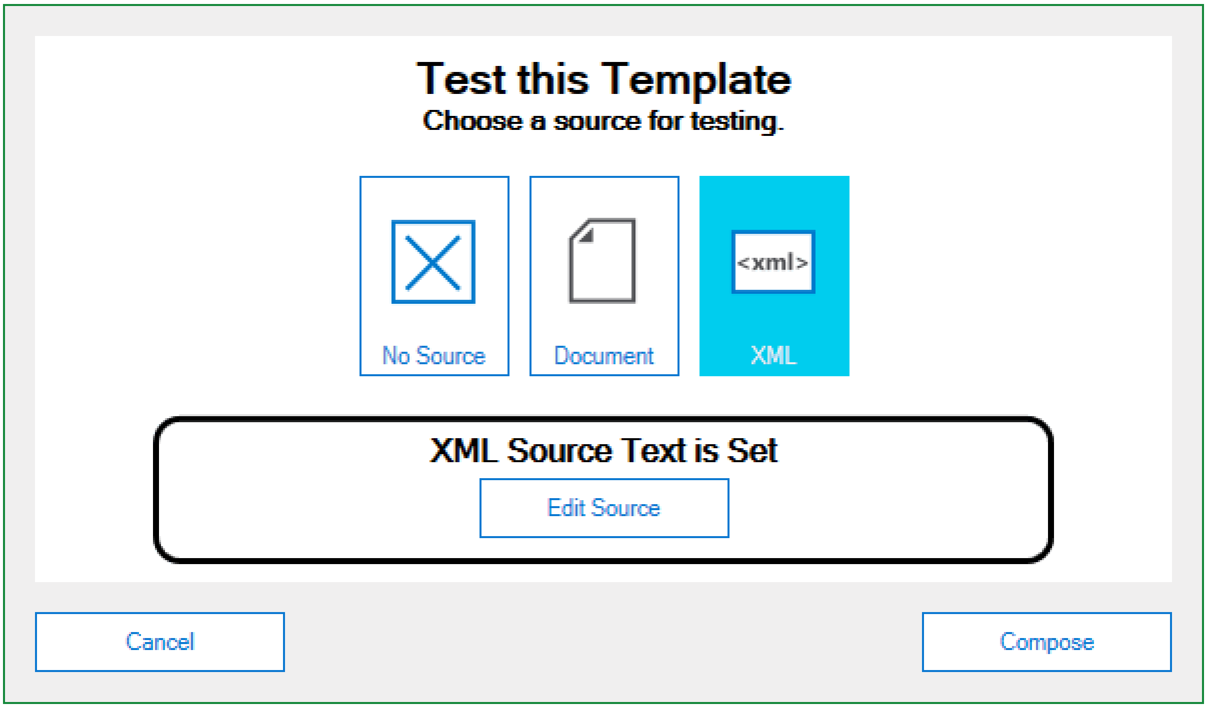
2. Enter the desired XML or edit existing XML as needed.
3. Click the **Format XML** button to standardize the spacing of the entered XML.

   This helps to make the XML easier to view. It does not add necessary characters to or remove unnecessary characters from the XML. This button can also be used to expand collapsed elements.

4. Click **OK**.

   The **Test this Template** dialog box indicates XML source text is set.

   You are notified if the XML you entered is invalid. If the XML is invalid, you are prompted to edit the XML you entered.



5. Click **Compose**.

   The composed document is displayed. Configuration settings for populated Placeholders are automatically displayed as comments.

Note: Placeholders located in Headers and Footers will not display configuration settings, as comments cannot be added to Headers and Footers in Microsoft Word.

Note: Comments are not displayed for Nested Placeholders or for Placeholders composed within a Fragment or Repeating Placeholder.

Inspect the document to ensure the configured elements are displaying as expected.

Note: Depending on your privileges, you may not be able to view the composed template. For example, you may not have rights to view certain Placeholders.

Release Of Information Unity Scheduler Tasks

The Unity Scheduler module allows you to schedule Release of Information (ROI) tasks to generate ROI packets at a regular interval.

Release of Information Task Group

Before creating a task for ROI packet generation, you must create a task group. When you create the ROI Packet Generation service, you will need to specify the name of the task group containing the packet generation task.

Note: As a best practice, assign only one task to this task group.

To create a task group:

1. Open the Unity Management Console.
2. Add or connect to a task scheduler for the appropriate data source.
3. Expand the task scheduler in the **Console** pane.
4. Right-click **Tasks** and select **Create Task Group**.
5. Enter a name for the task group that will run the packet generation task.

Release of Information Task

The Release of Information task type generates packets based on ROI requests managed in the Medical Records Unity Client. You must create a Release of Information task in order for ROI packets to be generated.

The following settings are recommended for the Release of Information task. Detailed steps follow this table.

Task Wizard Prompt	Value / Setting
Name	Generate ROI Unity Packets
Task Group	The task group you created for packet generation. Only one task should be assigned to this task group.
What type of task do you want to create?	Release of Information
Which user groups should have access to this task?	The User Group that needs to manage the task using the Unity Management Console.

To create a Release of Information task:

1. In the Unity Management Console, connect to the task scheduler for the appropriate data source.
2. Right-click the task scheduler and select **Create Task**.
3. Name the new task **Generate ROI Unity Packets**.
4. Type an optional description for the task.
5. From the **Task Group** drop-down, select the task group that will run the packet generation task.
6. Click **Next**.
7. Select **Release of Information** from the task type drop-down.
8. Click **Next**.
9. Select the User Group responsible for managing the task using the Unity Management Console, and then click **Add**.
10. Click **Next**.
11. On the scheduling page, click **Add**, and then select **Interval**.
12. Set the interval according to your packet generation needs.
13. Click **OK**.
14. Click **Next**.
15. Select **The interval schedules should always execute**.
16. Click **Next**.
17. Optionally, specify when the task should start and expire. Because the ROI Packet Generation service should always execute, it is recommended to leave these options disabled.
18. Click **Next**.
19. Click **Finish**.

OnBase Foundation EP5

Release of Information (Unity)

User Guide

Foundation EP5

The Release of Information module in the OnBase Medical Records Unity Client allows you to create and process requests for patient medical information.

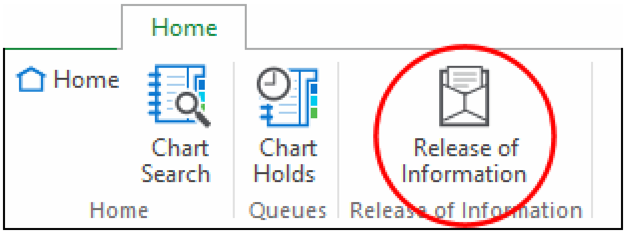
Existing requests can be managed from the Release of Information layout, where you can also create new requests and manage existing requests.

Opening Release of Information

The Release of Information layout is a dashboard that allows you to do the following:

- Open and manage requests
- View your assigned requests
- Assign and unassign requests
- Create new requests

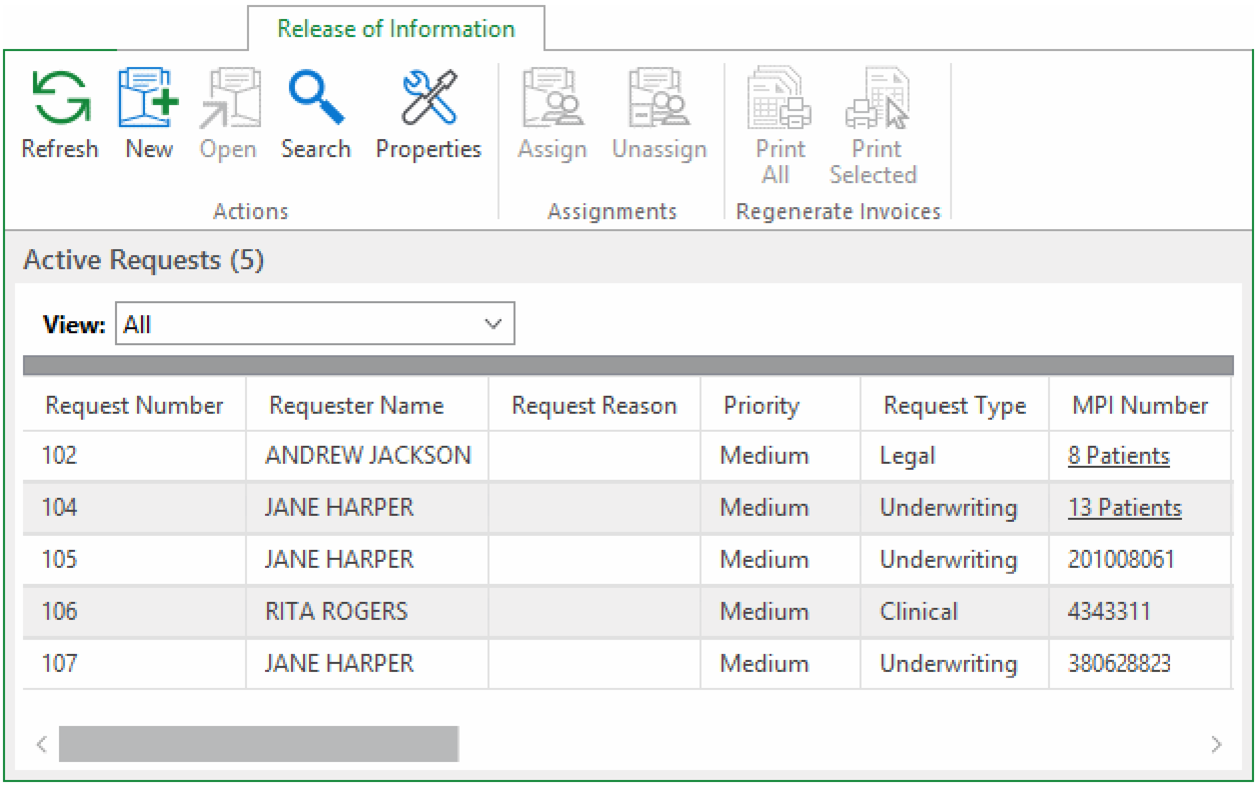
To open the Release of Information layout, click the **Release of Information** button, located on the **Home** tab in the OnBase Medical Records Unity Client.



Tip: To access Release of Information automatically when you log in, set **Release of Information** as your **Startup Page**. This setting is available under **Client Options** in User Options.

If you do not have a Medical Records or HL7 license, the Release of Information layout is displayed automatically upon login.

Upon opening, the Release of Information layout displays open requests in the **Active Requests** list. Active requests are requests awaiting user interaction. For information about columns available in the list, see Request Columns and Search Fields on page 510.



Note: Requests with a status of **Completed**, **Canceled**, or **Rejected** are not displayed in the **Active Requests** list. To retrieve these requests, use the search functionality. See Searching for a Request on page 306.

Refreshing the Layout

To update the list with the latest available information (e.g., changes, new requests), do one of the following:

- Click the **Refresh** button from the **Release of Information** tab.
- Right-click within the **Active Requests** list and select **Refresh**.

The rows and columns of the list reflect any changes that have occurred since the last time you opened the layout or clicked **Refresh**.

Request Statuses

The **Active Requests** list in the Release of Information layout displays open requests, which may have one of the following statuses:

Status	Description
Initiated	A request that is able to be modified.
Pending Approval	A request that was submitted for approval. Requests with this status are read-only. Only the **Comments** field can be edited.
On Hold	An in-progress request that has been placed on hold until the user working on the request is ready to begin working on it again. Requests with this status are read-only. Only the **Comments** field can be edited.
Pending Billing	Indicates that work on the request is complete and that an invoice needs to be sent to the requester. Requests with this status are read-only. Only the **Comments** field can be edited.
Awaiting Payment	A request that contains a balance due from the requester after the invoice has been sent. Requests with this status are read-only. Only the **Comments** field can be edited.
Pending Delivery	A request that is paid for and can be delivered to the requester. Requests with this status are read-only. Only the **Comments** field can be edited.
Pending Packet	A request that is in the process of being finalized and currently creating the packet of attached documents. Requests with this status are read-only. Only the **Comments** field can be edited.
Not Approved	A request that was submitted for approval but was sent back. A request that is not approved indicates a user should modify the request in some way before it is resubmitted for approval.

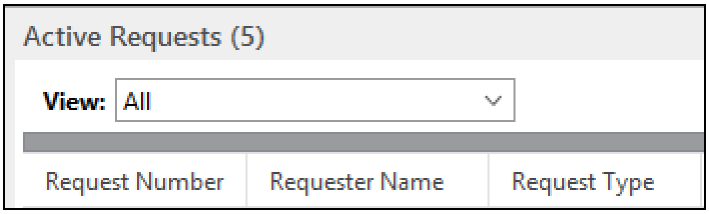
Note: Requests with a status of **Canceled**, **Rejected**, or **Completed** are not displayed in the **Active Requests** list. To view these requests, use the search functionality. For more information, see Searching for a Request on page 306.

In some instances, an icon may be displayed next to the request status in the **Active Requests** list. The table below lists the icons that may be displayed next to a status.

Icon	Description
Not Approved	A request that was not approved after the request was submitted for approval. Something on the request should be changed before submitting the request again. For more information on the approval process, see Approving Requests on page 385. **Tip:** The **Comments** field on the Request Form may contain a reason the request was not approved.
Awaiting Packet Creation	A packet for the request is currently being prepared and compiled. For more information on packet creation, see Finalizing a Request on page 383.
Creating Packet	A packet for the request is currently being created. For more information on packet creation, see Finalizing a Request on page 383.
Error Creating Packet	There was an error before or during packet creation. For more information, contact your system administrator. For more information on packet creation, see Finalizing a Request on page 383.
Retrieving External Documents	The request is currently gathering documents from an external source. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 417. **Tip:** To expedite the process, you should not have the request opened. The **Attachments** list cannot be updated if the request is locked. For more information on request locks, see Managing Locks on page 319.
Document Retrieval Complete	The request has completed gathering external documents. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 417.
Error Retrieving Documents	There was an error retrieving external documents for this request. For more information, contact your system administrator. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 417.

Filtering Requests

To filter the displayed requests, select a filter from the **View** drop-down. The filter you select is retained across login sessions.



The following filters are available:

- **All** - Displays all open requests.
- **Assigned to me** - Displays all open requests assigned to the current user.
- **Unassigned** - Displays all open requests that are not assigned to any user.
- **Aged Invoices** - Displays all open requests that include aged invoices. For more information on aged invoices and regenerating invoices, see Regenerating Invoices on page 311.

Searching for a Request

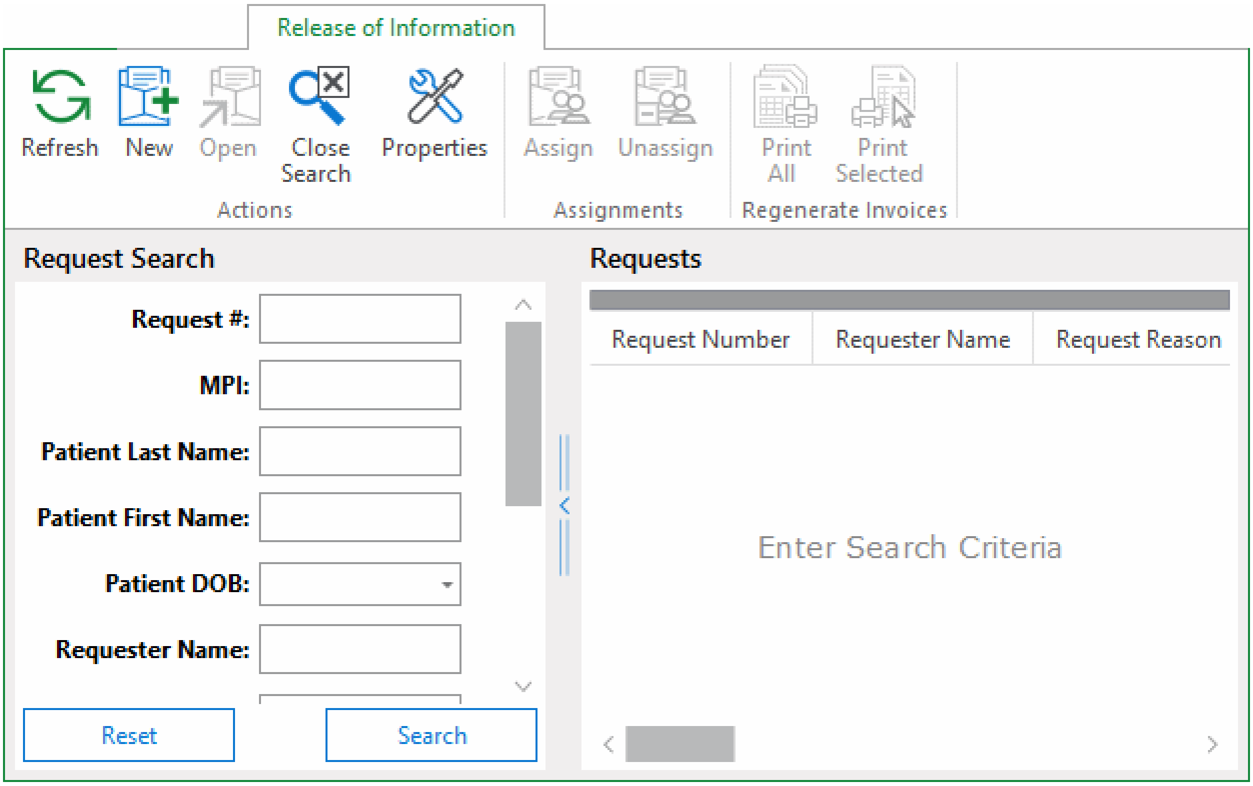
You can search for any request created in the system, as long as the request has been saved.

Requests with the following statuses can only be retrieved through a search:

- Canceled
- Rejected
- Completed

To search for a request:

1. From the **Active Requests** list, click **Search**. The **Request Search** screen is displayed.



2. Enter search criteria in the **Request Search** panel. You must provide a value for at least one field.

   For information about possible search fields and columns, see Request Columns and Search Fields on page 510.
3. Click **Search** or press the **Enter** key. Results are displayed in the **Requests** list.

   To clear entered information from the search fields and start over, click **Reset**.

Note: If a search returns more than 100 results, only the first 100 results are listed and a message is displayed instructing you to narrow your search.

Using Wildcard Characters

Wildcard characters (***** or **?**) can help you find charts by expanding your search results.

Type one of the following wildcard characters into the search field to search with values containing one or more unspecified characters:

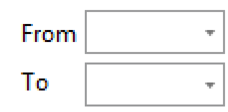
Wildcard	Description
*	The * wildcard character can replace several characters within a search value. For example, the value OLS* would retrieve all instances of Olsen, Olsted, and Olswood.
?	The **?** wildcard character can replace a single character within a search value. For example, the value SM?TH would retrieve instances of both Smith and Smyth.

Note: If you use a wildcard, the search field must contain at least one character that is not a wildcard. For example, you can search for an MRN of **9***, but you cannot search for an MRN by entering only *****.

Searching By Date Range

The following examples illustrate how to use date ranges for retrieval.

Date Constraint	Directions	Example
Specific Date	Enter the same date for the **From** and **To** date. This example would find only results with a date of **6/26/2017**.	From 06/26/2017 To 06/26/2017
Specific Date Range	Enter the start date in the **From** field and end date in the **To** field. This example would find results that fall within the date range of **1/1/2017** through **12/31/2017**.	From 01/01/2017 To 12/31/2017
Open-Ended Date Range	Leave one of the fields blank. The first example would find results with a date of **1/1/2017** or later. The second example would find results with a date of **6/26/2017** or earlier.	From 01/01/2017 To From To 06/26/2017

Date Constraint	Directions	Example
None	Leave both fields blank. This example would not restrict results by date.	

Note: If you enter an invalid date, the field will revert to its previous value when you select another field or execute the search.

Assigning and Unassigning Requests

You can assign and unassign requests to other users from the Release of Information layout or from within requests themselves, depending on your privileges. When a request is assigned to another user, only that user can work on the request. When a request is unassigned, any user with appropriate privileges can work on the request.

Assigning a Request

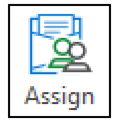
While only one person can access a request at a time, multiple users may attempt to access and modify a request over a period of time if the request is unassigned. Assigning a request can help avoid confusion by restricting the request to only one user.

Depending on your privileges, you may only be able to assign requests to yourself. If you have sufficient privileges, you can assign requests to other available users.

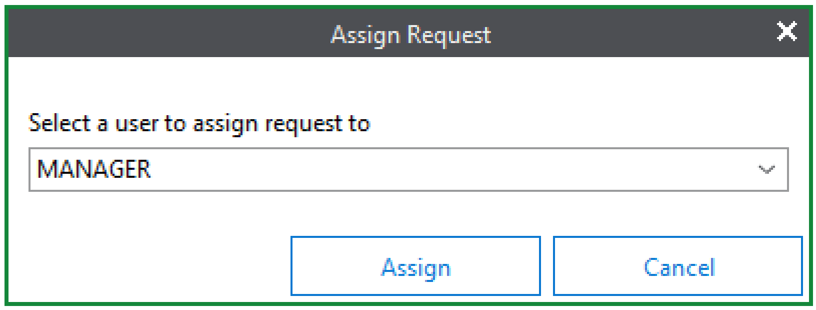
To assign a request:

1. Do one of the following:
    - From the **Active Requests** list of the Release of Information layout, select one or more requests.
    - Retrieve and open the appropriate request.

2. Click the **Assign** button on the **Release of Information** tab.



If you have privileges to assign requests to other users, the **Assign Request** dialog box is displayed. Otherwise, the requests are assigned to you.



3. If applicable, select a user to assign to the request from the drop-down list.

Note: Availability of users depends on user rights. For example, if a facility is selected for the request, the drop-down list does not display users who do not have rights to that facility.

4. Click **Assign**. The request is saved and assigned to the selected user.

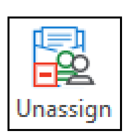
Unassigning a Request

If a request should be assigned to a different user, it can be unassigned from the current user.

Depending on your privileges, you may only be able to unassign requests that are assigned to you. If you have sufficient privileges, you can unassign requests from other users.

To unassign a request and make it available to other users:

1. Do one of the following:
   - From the **Active Requests** list of the Release of Information layout, select one or more assigned requests.
   - Retrieve and open an assigned request.
2. Click the **Unassign** button from the **Release of Information** tab.



Upon being unassigned, the request is available to other users. Any unsaved changes on the request are automatically saved.

Regenerating Invoices

Once an invoice is generated and printed for a request, the original invoice date is logged in the system. An invoice is considered aged when 30 or more days pass since the invoice was created and the request has not been paid for in full.

From the **Active Requests** and **Request Search** layouts, you can select to regenerate and reprint invoices from requests that have not been paid for in full. The option to regenerate an invoice from these layouts is available when the original request invoice was generated:

- Between 30 and 59 days ago
- Between 60 and 89 days ago
- Between 90 and 119 days ago
- 120 or more days ago

These time frames are significant, because once an invoice is regenerated within a certain time frame, it cannot be regenerated from the **Active Request** and **Request Search** layouts until it reaches the next time frame. In other words, if you regenerate an invoice within the 30-to-59-day time frame, you can only regenerate it when and if it reaches the 60-to-89-day time frame.

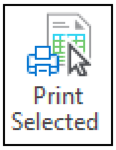
Tip: An invoice can always be regenerated from within a request, regardless of whether it was already regenerated within the current 30-day time frame. For more information on printing invoices from within a request, see Billing a Requester on page 387.

Regenerating an Invoice for an Unpaid Request

Depending on your rights, you can regenerate an aged invoice from the **Active Requests** and **Request Search** layouts when it meets certain conditions. For more information on aged invoices and prerequisites to regenerate aged invoices, see Regenerating Invoices on page 311.

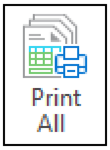
To regenerate one or more aged invoices:

1. From the **Active Requests** or **Request Search** layout, do one of the following:
    - Select one or more requests with an aged invoice. The **Print Selected** button in the **Release of Information** tab is enabled if the request meets the prerequisites.



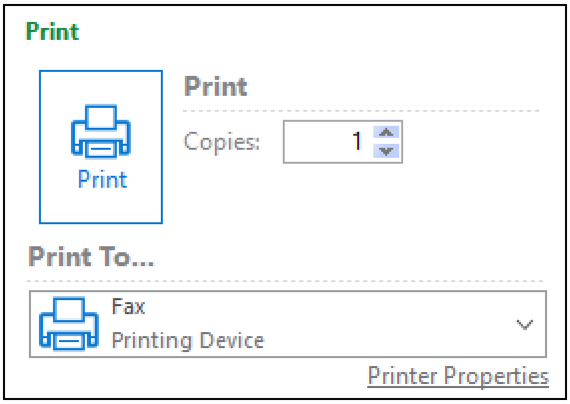
Click the **Print Selected** button.

- By default, the **Print All** button in the **Release of Information** tab is enabled if one or more requests in the list have aged invoices that meet prerequisites.



The **Print Invoice** dialog box is displayed.

Note: You may experience different behaviors, depending on your system settings. If the generated invoice is displayed, you must choose to accept the invoice before moving on. If you are prompted to upload the invoice, you must manually upload the invoice to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.



2. Set print options appropriately and click **Print**.

Note: For more information on print options, see Configuring Print Settings on page 397.

Viewing Request Properties

Properties of a request can be viewed from both the Release of Information layout and the request itself.

Note: Currency and date values are displayed according to workstation locale.

Viewing Request Properties from the ROI Layout

When accessed from the Release of Information layout, the properties are displayed in the **Properties** pane on the right side of the layout and include information found on the request form, general request information, payment information, and attachment information. The **Properties** pane is updated to display information about any single request that is selected from the **Active Requests** list.

If more than one request is selected, the pane is cleared.

Tip: To quickly view information about different requests, keep the **Properties** pane open and select requests as needed.

To view request properties from the Release of Information layout:

1. Select a single request.
2. Do one of the following:
   - Click the **Properties** button from the **Release of Information** tab.

   - Right-click the request and select **Properties**.

Viewing Request Properties from an Open Request

When accessed from the request itself, properties are displayed in the **Properties** dialog box. Properties include general request information, as well as information regarding payment and attachments.

To view request properties from an open request, click the **Properties** button from the **Release of Information** tab.

The **Request Properties** dialog box is displayed.

Request Properties

Depending on how you access request properties, the following properties may be displayed:

Note: Currency and date values are displayed according to workstation locale.

Property	Description
Request #	The unique number assigned to the request upon its creation.
Created	The date and time the request was created.
Priority	The priority the request should take to be completed, specified on the request form.
Request Type	The Request Type of the request, specified on the request form.
Delivery Method	The method the request is to be delivered to the requester, specified on the request form.
Created By	The user who created the request.
Assigned To	The user assigned to work on the request.
Status	The current status of the request.
Request Reason	The descriptive reason behind the requester requesting the information, specified on the request form.
Requester Name	The name of the person or group requesting the information, specified on the request form.
Requester Email	The email address of the requester, specified on the request form.
Company	The company the requester belongs to, specified on the request form.
Relationship	The relationship of the requester to the patient, specified on the request form.
Shipping Address	The shipping address of the requester, specified on the request form.
Billing Address	The billing address of the request, specified on the request form.
Number of Documents	The number of documents attached to the request.
Number of Pages	The number of pages included in the documents attached to the request.
Number of Additional Pages	The number of additional pages attached to the request, specified on the request form. Additional pages are external pages that are added to the request outside of the OnBase ROI process.

Property	Description
Cost	The cost of all the items attached to the request, including external items.
Cost Adjustment	The amount subtracted from the Cost of the request to create the Subtotal. If the Request Type requires billing, a cost adjustment can be entered manually when the invoice is printed.
Subtotal	This amount is the Cost of the request minus the Cost Adjustment.
Tax	The amount charged for tax, based on region. This amount is based on a percentage of the Subtotal.
Shipping / Handling	The amount charged for shipping and handling of the request.
Total Amount	The total amount charged to the requester after the Subtotal, Tax, and Shipping / Handling are calculated.
Amount Paid	The amount the requester has paid to this point.
Payment Method	The method by which the requester is paying to have the request printed and delivered.
Comments	Any comments entered in the **Comments** field of the request.

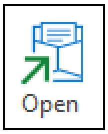
Opening an Existing Request

You can open requests from the **Active Requests** list and the request search results list. You cannot open a request if you do not have permission to view one or more documents attached to the request. See your system administrator for more information.

Note: You cannot select multiple requests and open them all at once.

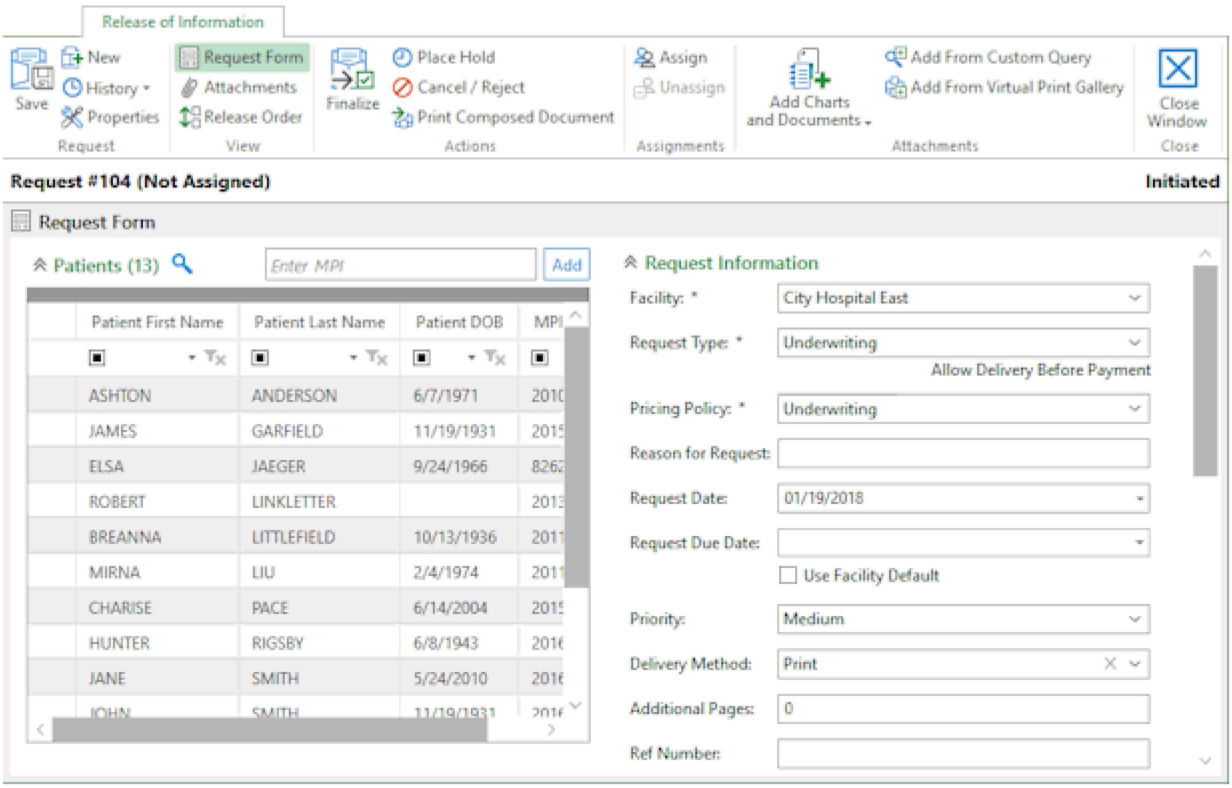
To open a request displayed in the Release of Information layout, do one of the following:

- Double-click the request.
- Select a request from the list, and then click the **Open** button from the **Release of Information** tab.



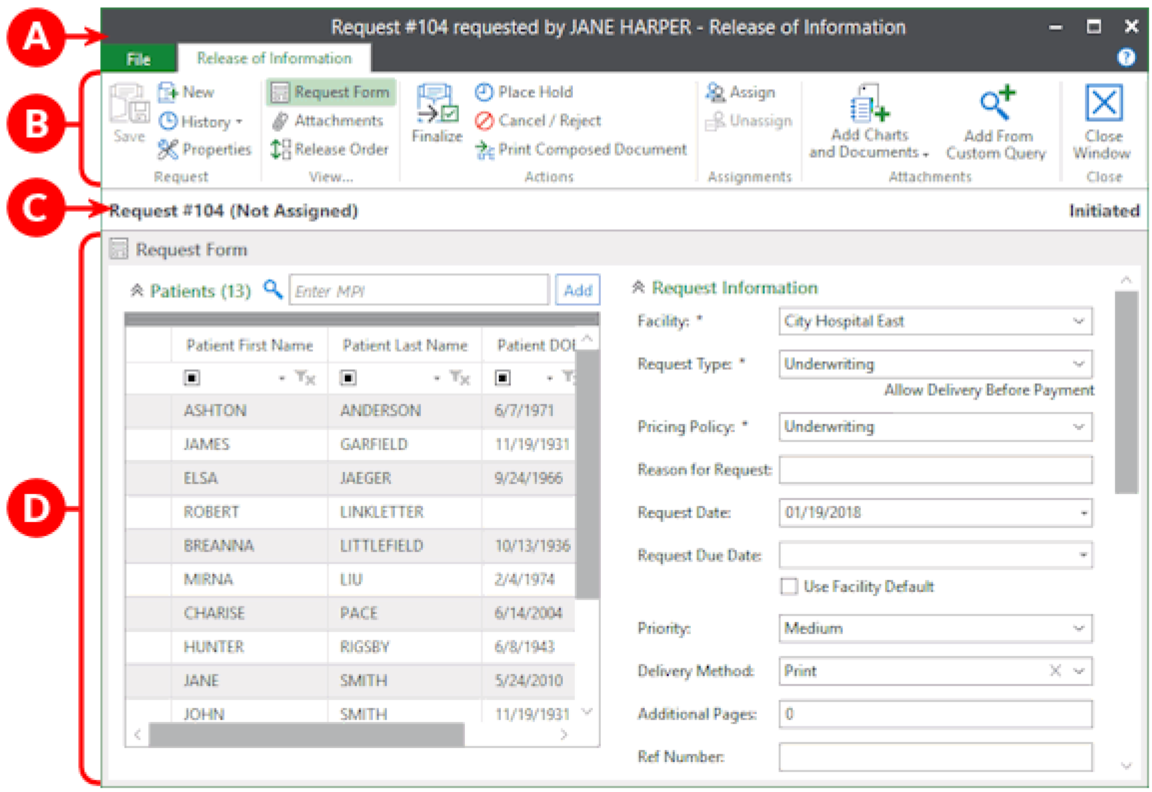
The request is displayed.

Note: A notification may be displayed if documents that are attached to the request were deleted from the system. For more information, see Removing Deleted Documents from a Request on page 318.



Request Editor Diagram

Requests are displayed in the Request Editor. The Request Editor is a window that allows you to view, modify, and perform actions on a request. The following diagram illustrates what the Request Editor might look like, depending on your rights and the state of the request:



Element	Description
A	**Title Bar** - Displays the Request # and the requester name. An asterisk (*) at the end of the title means there are unsaved changes on the request. If a request is disabled and cannot be modified, **[Read-Only]** is displayed after the requester name.
B	**Ribbon** - Displays available actions you can perform on the request. Available actions depend upon your privileges and the state of the request.
C	**Request Header** - Displays information about the request, including the Request #, the user the request is assigned to, and the current status of the request.
D	**Request Form** - Displays the patient or patients the request is for, the name and address of the requester, additional request information, and associated external items.

Removing Deleted Documents from a Request

Upon opening a request, you may receive a prompt indicating this request contains documents that have been deleted from the system. To recover the documents, contact your system administrator. Otherwise, remove the documents from the request.

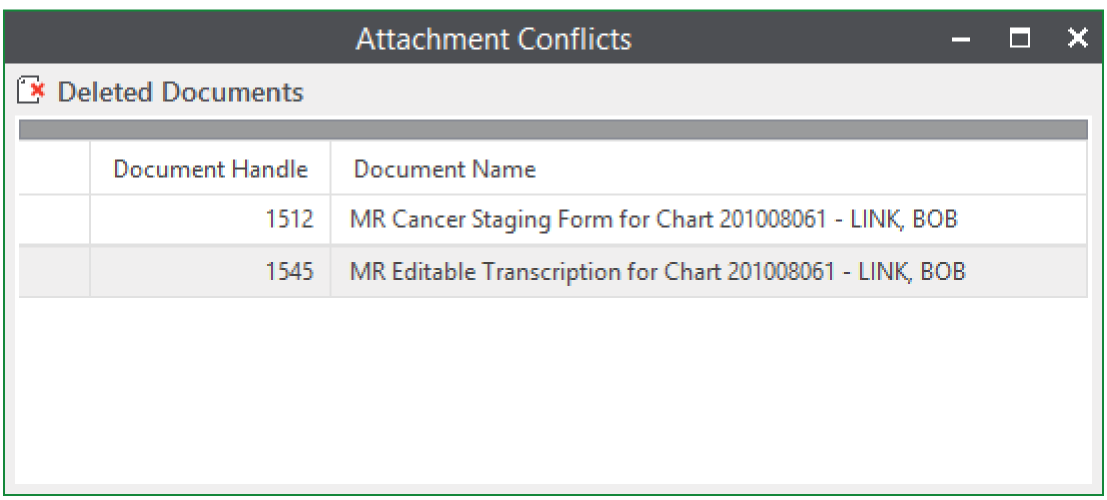
A request cannot be finalized until all deleted documents have been removed. This requirement ensures you are aware of which documents have been deleted and cannot be included in the request.

Note: Documents cannot be removed from the request if it is in a read-only state.

To remove deleted documents from the request:

1. Open the request
2. Click **OK** at the prompt.
3. Click the **Deleted Document(s)** button in the request header.

The **Attachment Conflicts** dialog box is displayed.

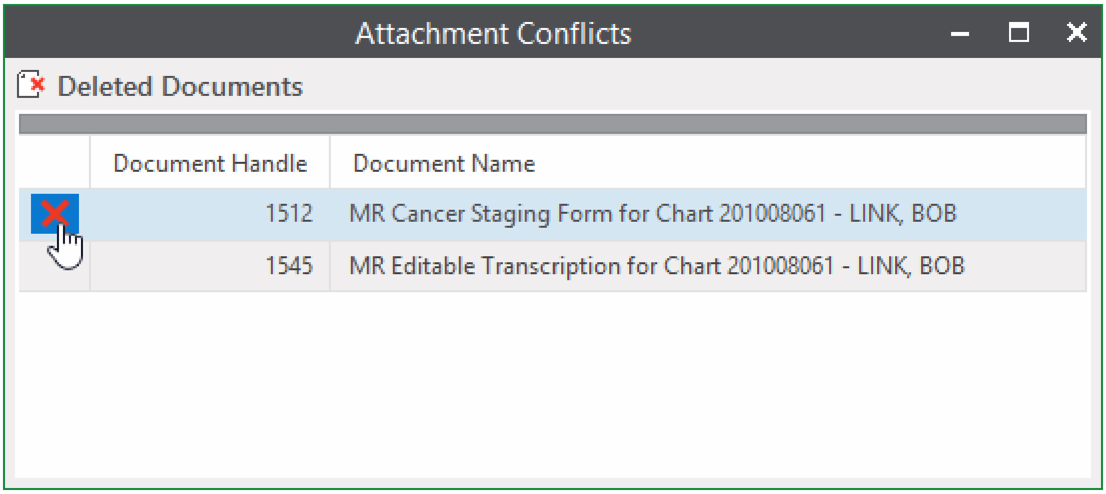


4. Rest the mouse pointer over an item you want to remove from the request.

Note: If the document name is not available, the document has been permanently purged from the system. For more information, contact your system administrator.

---

5. Click the **X** on the left side of the list.



6. Repeat the process as necessary.
7. When finished, save your changes to remove the documents from the request.

Note: For more information on saving a request, see Saving a Request on page 348.

Managing Locks

When a request is open by a user, the request is locked. When a request is locked, only the user viewing the request can modify it.

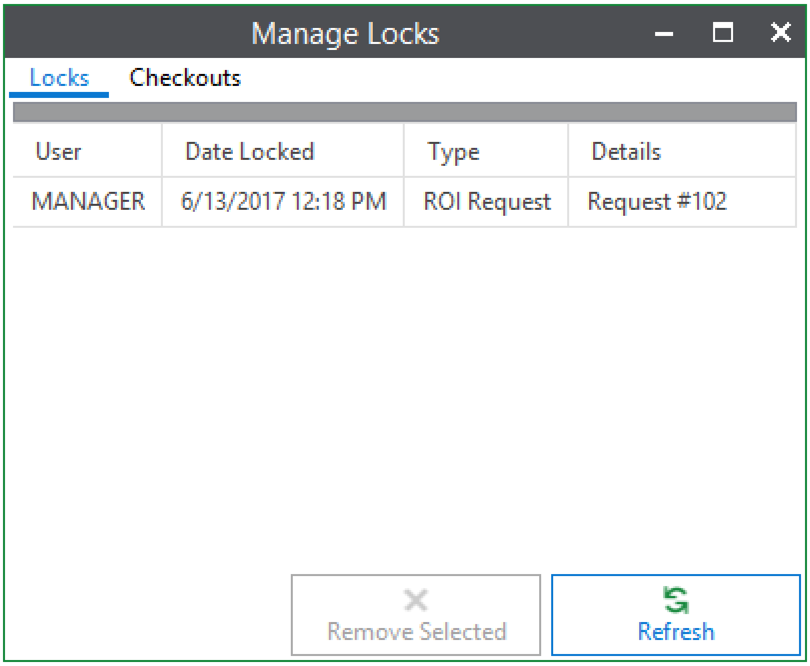
If a user opens a request that is assigned to another user, then neither user can modify the request until the lock is removed. A user cannot work on a request assigned to a different user, and the user assigned to the request cannot work on the request until the lock is removed.

A lock is removed when the request is closed, when the user who creates the lock logs out, or when the lock is manually removed. For example, if the Medical Records Unity Client shuts down unexpectedly, you may need to manually remove the lock.

To remove a request lock manually:

1. From the Medical Records Unity Client, click the **File** menu.
2. Select **Manage Locks**.

   The **Manage Locks** dialog box is displayed. From here, you can view information regarding each locked request, including the user who locked the request, the date the request was locked, and the Request #.



3. Select one or more locks you'd like to remove.

   Release of Information requests use the **ROI Request** lock type, which is displayed in the **Type** column. The Request # is located in the **Details** column.
4. Click **Remove Selected**. The selected locks are removed.

Creating an ROI Request

A Release of Information (ROI) request can be created from selected charts or documents in the Medical Records Unity Client or from scratch within the ROI layout.

Creating a New Request Using Selected Charts or Documents

If your system is licensed for the HL7 Listener, you can create new requests from charts or documents selected in the Medical Records Unity Client.

This functionality is not available if your system does not include an HL7 Listener license. Without an HL7 license, you can only create requests within the ROI layout. For more information on creating requests within the ROI layout, see Creating a New Request from the ROI Layout on page 323.

When you create a Release of Information request from charts or documents selected in the Medical Records Unity Client, the selected charts or documents are attached to the request.

Note: You can only attach documents you have rights to view. If you attempt to attach a chart and do not have rights to view one or more documents in the chart, you are notified that some of the documents could not be attached to the request. For more information, see your system administrator.

You can create a Release of Information request from the following locations:

- Chart Search
- Combined View
- Encounters
- View Chart
- The Workflow layout (Workflow is available only if the system is licensed for Workflow. See your system administrator for more information.)

For information about these locations, see the **Medical Records Unity Client** module reference guide.

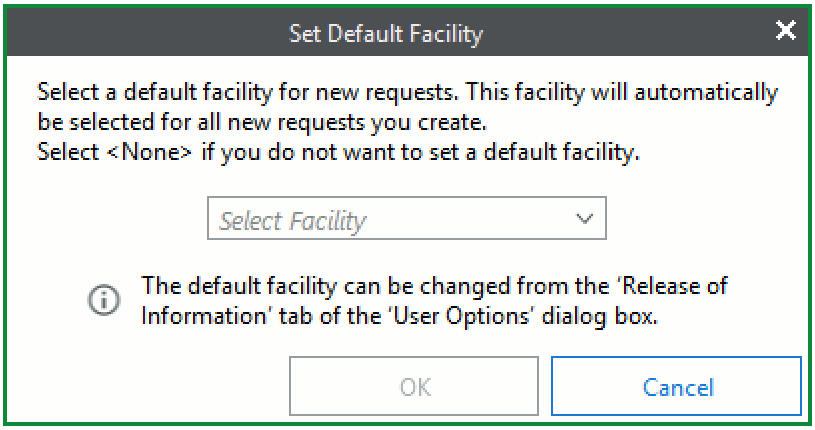
To create a request using selected charts or documents:

1. From the Medical Records Unity Client, select one or more charts or documents.
2. Click the **New Request** button on the **Chart** tab. Depending on the items selected, the multiple options may be displayed.

3. Select one of the following options:
   - **Create Request from Selected Chart(s)** - Allows you to create a new ROI request containing documents from the currently selected charts.

     If you click the **Release of Information** button from the **View Chart** window, you are instead given the option to **Create Request from Current Chart**.
   - **Create Request from Selected Document(s)** - Allows you to create a new ROI request containing documents from the currently selected documents.
4. If the **Set Default Facility** dialog box is displayed, do one of the following:
   - Select a facility from the drop-down list, and click **OK**. This facility will be automatically selected when you create new requests.
   - Select **<None>** from the drop-down list, and click **OK**. No facility will be automatically selected when you create new requests.

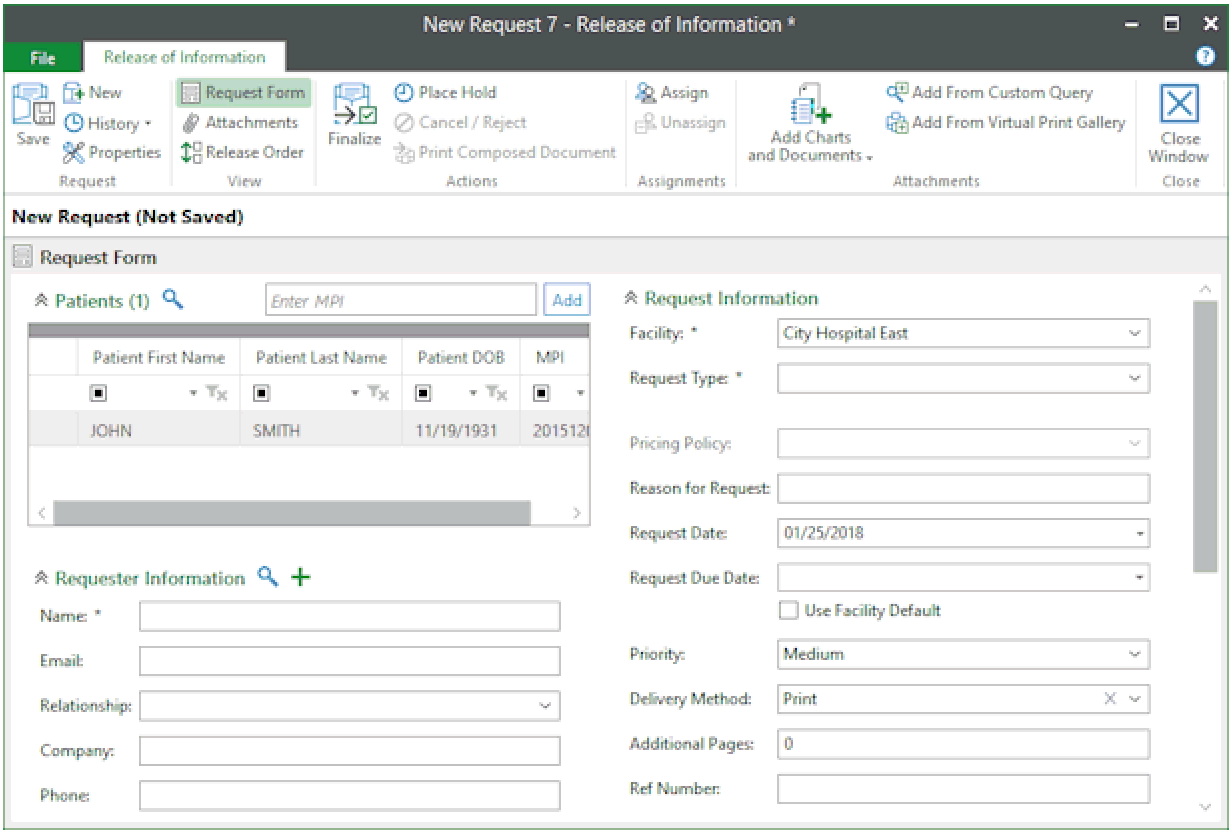
- Click **Cancel** to postpone making a selection until the next time you create a new request.



The **Set Default Facility** dialog box prompts you to specify a facility you would like selected by default for all new requests you create. The **Set Default Facility** dialog box is only displayed if you have not previously specified whether you would like to select a default facility.

Note: To change your default facility preference after selecting a facility or **<None>** and clicked **OK**, see ROI User Options on page 406.

The ROI request form is displayed, and the selected charts or documents are attached to the request. The associated patient is automatically populated in the **Patients** list.

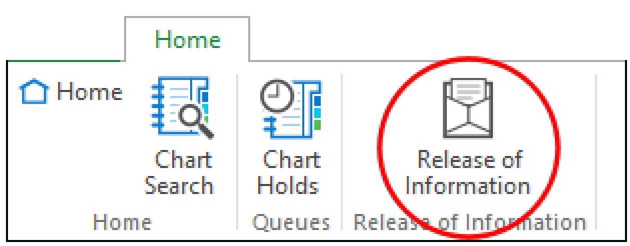


Creating a New Request from the ROI Layout

New ROI requests can be created from scratch within the Release of Information layout in the Medical Records Unity Client.

To create an ROI request from the Release of Information layout:

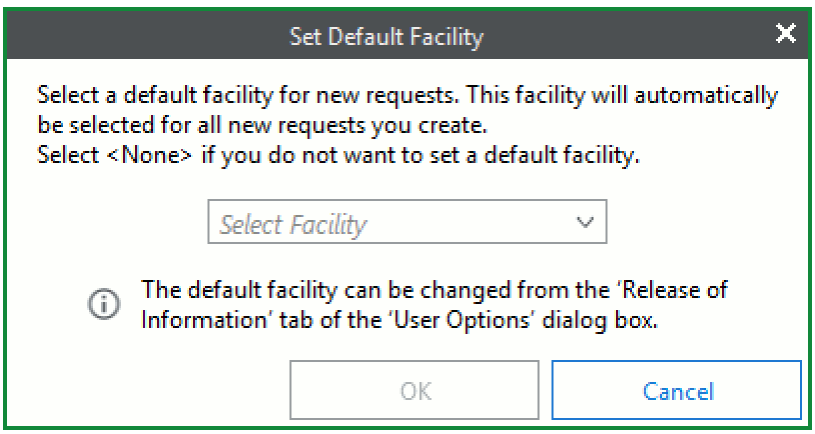
1. Click the **Release of Information** button on the **Home** tab.



The Release of Information layout is displayed.

2. Do one of the following:
   - Click the **New** button from the **Release of Information** tab.

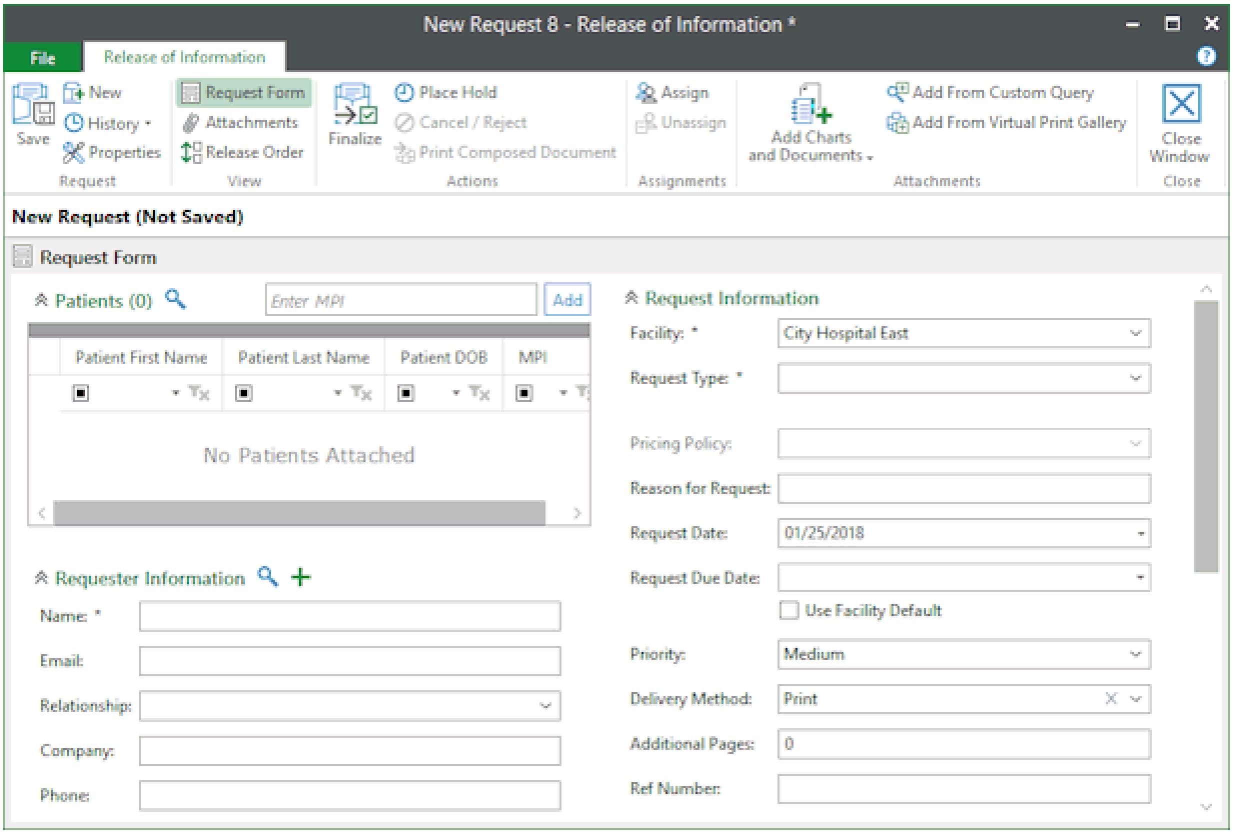
   - Right-click within the **Active Requests** list and select **New**.
3. If the **Set Default Facility** dialog box is displayed, do one of the following:
   - Select a facility from the drop-down list, and click **OK**. This facility will be automatically selected when you create new requests.
   - Select **<None>** from the drop-down list, and click **OK**. No facility will be automatically selected when you create new requests.
   - Click **Cancel** to postpone making a selection until the next time you create a new request.



The **Set Default Facility** dialog box prompts you to specify a facility you would like selected by default for all new requests you create. The **Set Default Facility** dialog box is only displayed if you have not previously specified whether you would like to select a default facility.

Note: To change your default facility preference after selecting a facility or **<None>** and clicked **OK**, see ROI User Options on page 406.

The ROI request form is displayed.



Entering Information into the Request Form

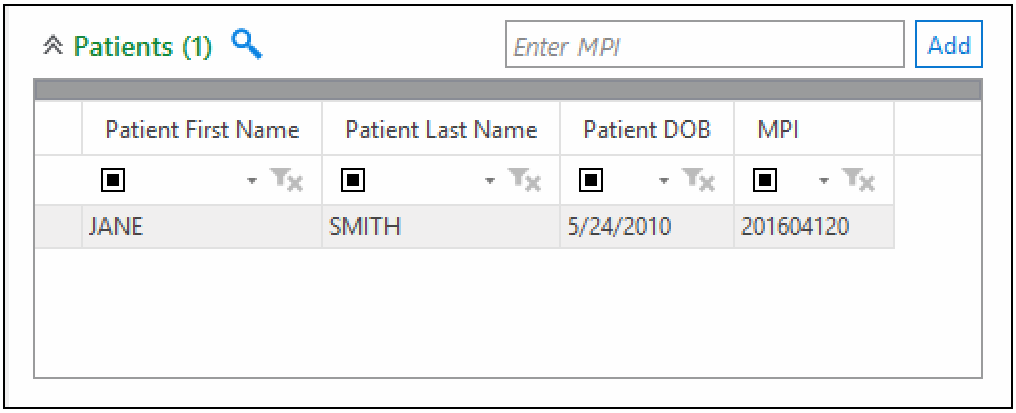
When a new request is created, the request form is displayed. The request form allows you to enter details regarding the patient whose information is being requested, the person or group requesting the information, and the way the request should be handled. You can also list external items that should be figured into the final cost of the request.

The following sections outline how to add information to the request form:

- Adding Patients to a Request on page 326
- Adding Requester Information to a Request on page 333
- Adding Request Information to a Request on page 343
- Adding External Items to a Request on page 346
- Adding Comments to a Request on page 348

Adding Patients to a Request

On the ROI request form, the **Patients** list displays information about the patients whose information is being requested.



Patients can be attached to an ROI request in the following ways:

- Creating the request from selected charts or documents in the Medical Records Unity Client.
- Adding specific MPIs, MRNs, or chart IDs to the request form.
- Searching for and retrieving the appropriate patient record directly from the request form.

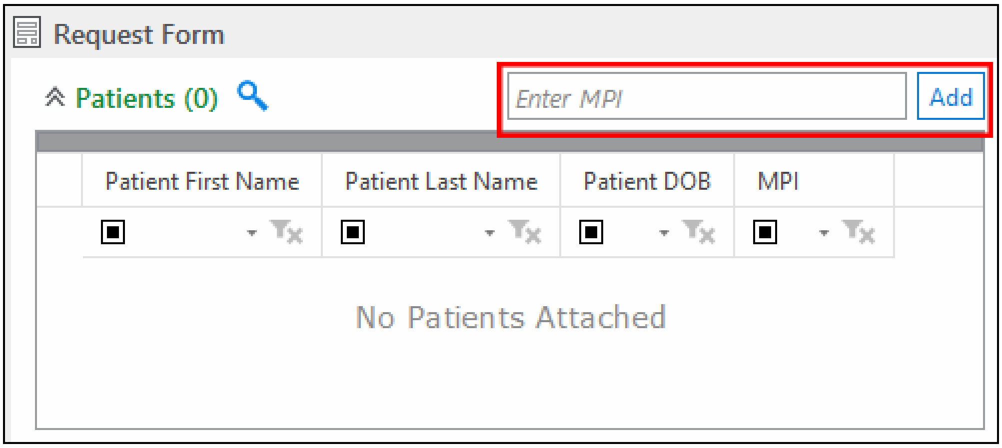
Note: If your system does not have an HL7 Listener license, you must enter patient information manually. Patients cannot be automatically attached to the request, because an HL7 Listener license is required for retrieving patient records and creating requests from existing charts and documents. Enter the MPI / MRN, patient name, and patient date of birth in the fields provided.

Adding Patients By MPI or MRN

The request form allows you to quickly add patients by either MPI or MRN, depending on your system's configuration.

To add patients by MPI or MRN:

1. In the field above the **Patients** list, do one of the following:
   - If the field says **Enter MPI**, enter the patient's MPI.
   - If the field says **Enter MRN**, enter the patient's MRN.



2. Press **Enter** or click **Add**. The patient associated with the identifier is added to the **Patients** list.
   If multiple patients are associated with the identifier, then an error is displayed, and you must use patient lookup to associate the correct patient with the request. See Searching for Patients on page 330.
3. Repeat for each patient to include in the request.

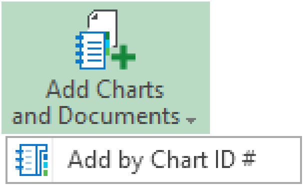
Adding Patients by Visit Number

If you do not know the patient identifier, you can add patients to a request by visit or chart ID number.

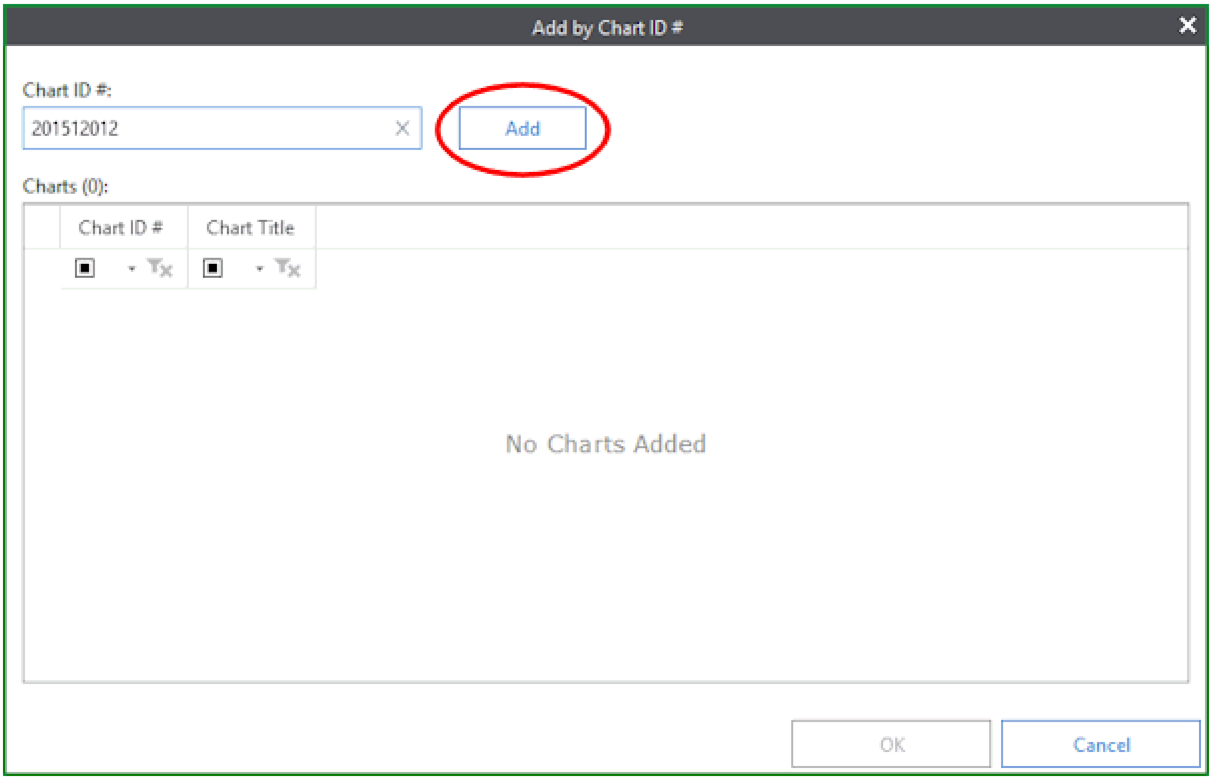
Note: In the following procedure, the term **Chart ID #** may be replaced with a label that reflects the term used within your organization. For example, labels may display the term **Visit #**, **Encounter #**, or **Account #** instead of **Chart ID #**.

To attach patients:

1. From an open request, click the lower half of the **Add Charts and Documents** button, and select **Add by Chart ID #**.

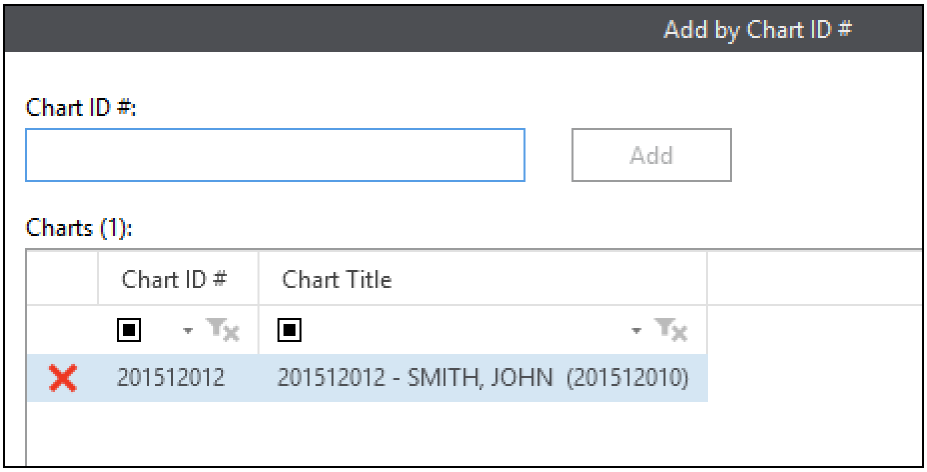


2. In the **Chart ID #** field, enter the ID number of the patient's chart.
3. Click **Add**.



If multiple charts match the identifier you entered, the **Select Chart From List** dialog box displays the matching charts. Select the chart you want to add, and then click **OK**.

4. Continue adding chart IDs as needed.
   To remove a chart ID, rest your pointer over it, and click the **X** displayed to the left of the chart.

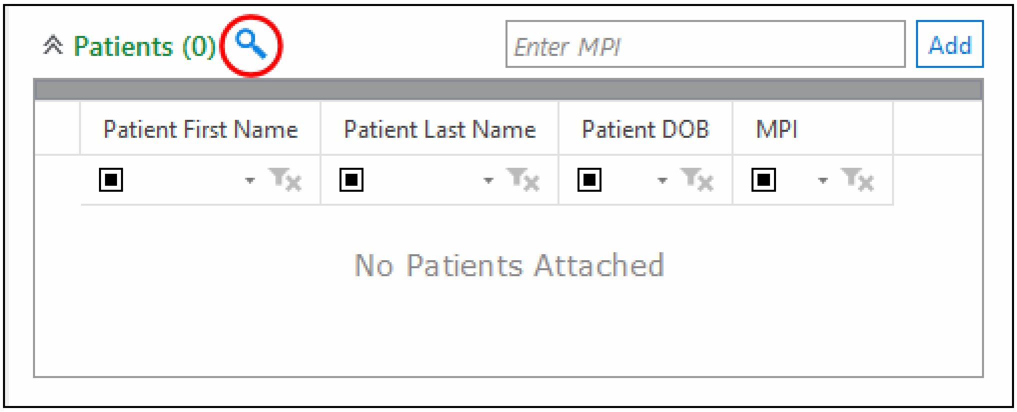


5. Click **OK** when you are done adding chart IDs.

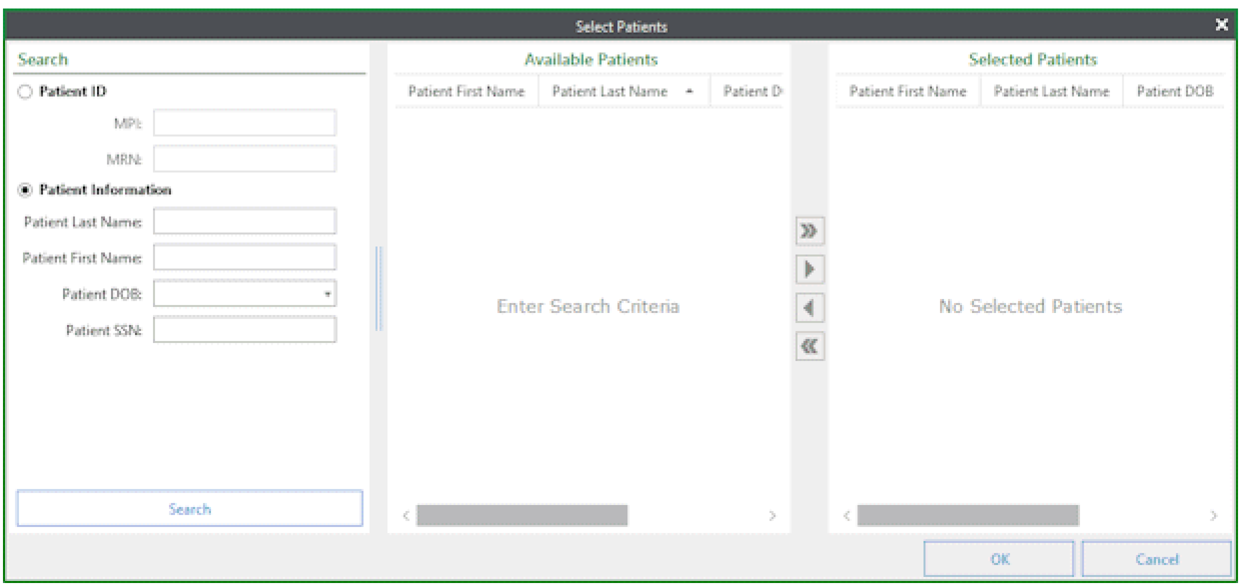
Searching for Patients

To search for and retrieve the appropriate record for the request:

1. From the request form, click the **Patient Lookup** button.

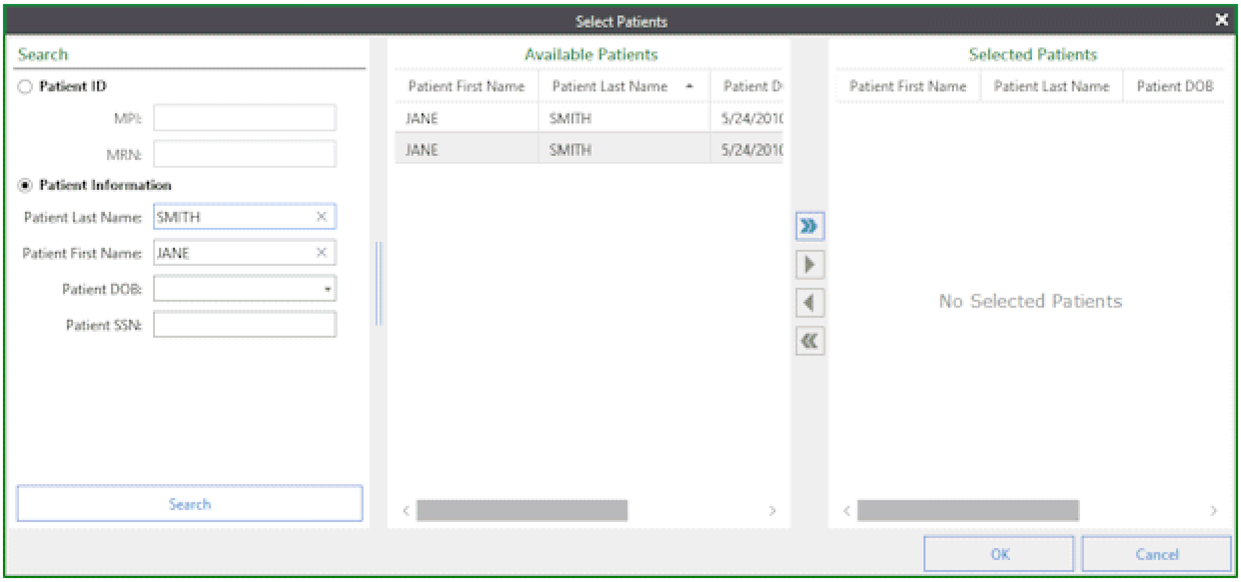


The **Select Patients** dialog box is displayed.



2. Select one of the following search options:
   - **Patient ID** - Allows you to search for patients by **MPI** and/or **MRN**, depending on your system's configuration.
   - **Patient Information** - Allows you to search for patients by name, date of birth, or Social Security Number.

3. Enter the appropriate information and click **Search**. Patient records matching the criteria are displayed in the **Available Patients** list.



4. Do one of the following:
   - To add one or more patients displayed in the **Available Patients** list, select the appropriate patient from the list and click the **Add Selected Items** button.
   - To add all available patients displayed in the **Available Patients** list, click the **Add All Items** button.
5. To search for and add additional patients, repeat the search process.
6. Verify the **Selected Patients** list is accurate.

   To remove a patient, select the patient and click the **Remove Selected Items** button.
7. Click **OK** when finished.

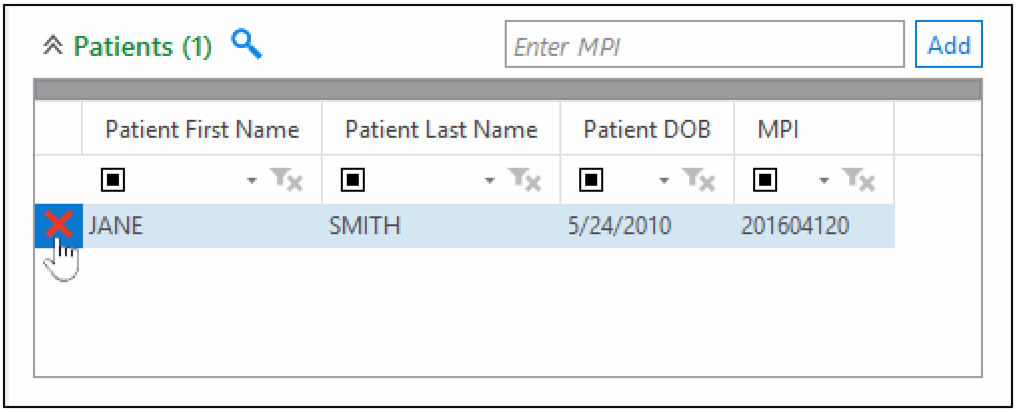
Removing Patients From a Request

If a patient has been attached to a request in error, you can detach the patient using the **Patients** list. Detaching the patient will also detach all of the patient's documents that are currently attached to the request.

To remove a patient from a request:

1. Open the ROI request form.
2. In the **Patients** list, locate the patient you want to remove from the request.

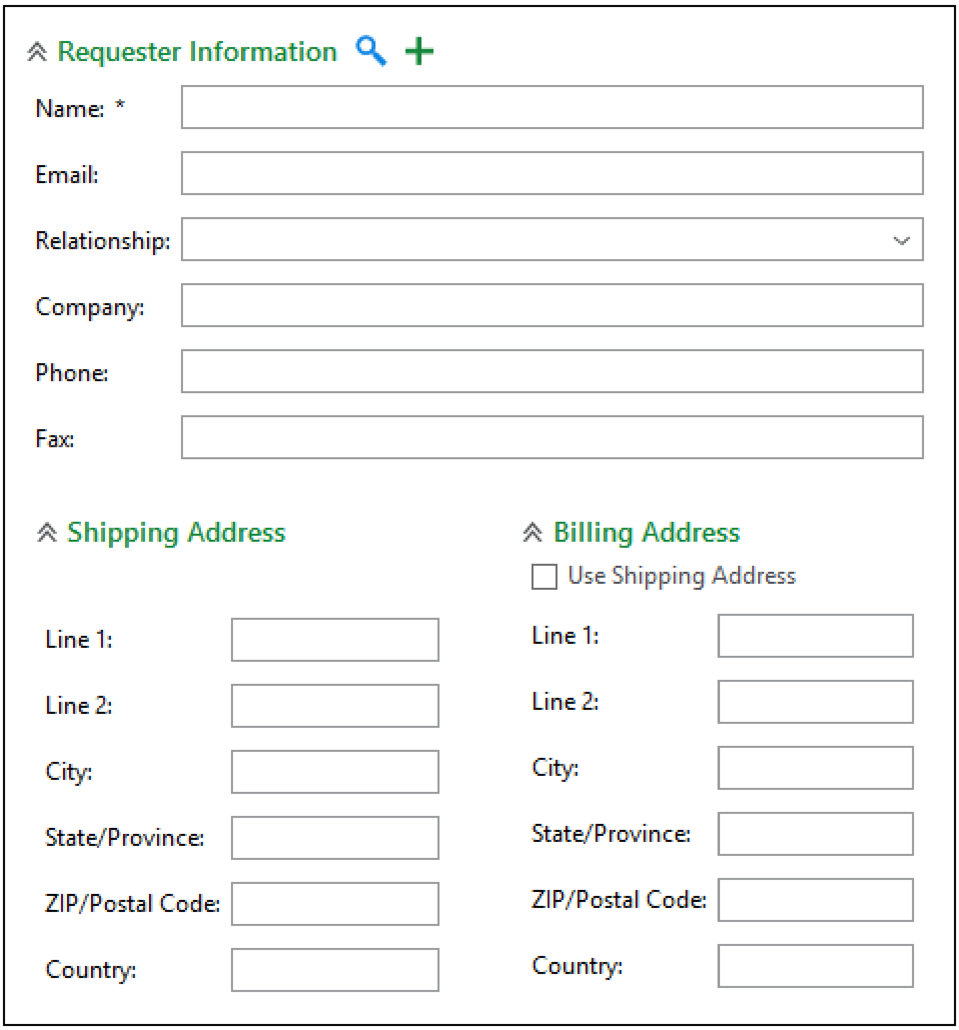
3. Rest your mouse pointer over the patient's name to display the **Remove** button in the leftmost column.



4. Click the **Remove** button.
5. If the patient has any documents attached to the request, you are prompted to confirm the removal of both the patient and associated documents.
   - Click **Yes** to confirm the removal.
   - Click **No** to cancel.

Adding Requester Information to a Request

The **Requester Information, Shipping Address**, and **Billing Address** sections of the request form allow you to enter information about the person or group requesting information. The fields located in these sections can be populated either manually or by searching for and retrieving existing requester information.

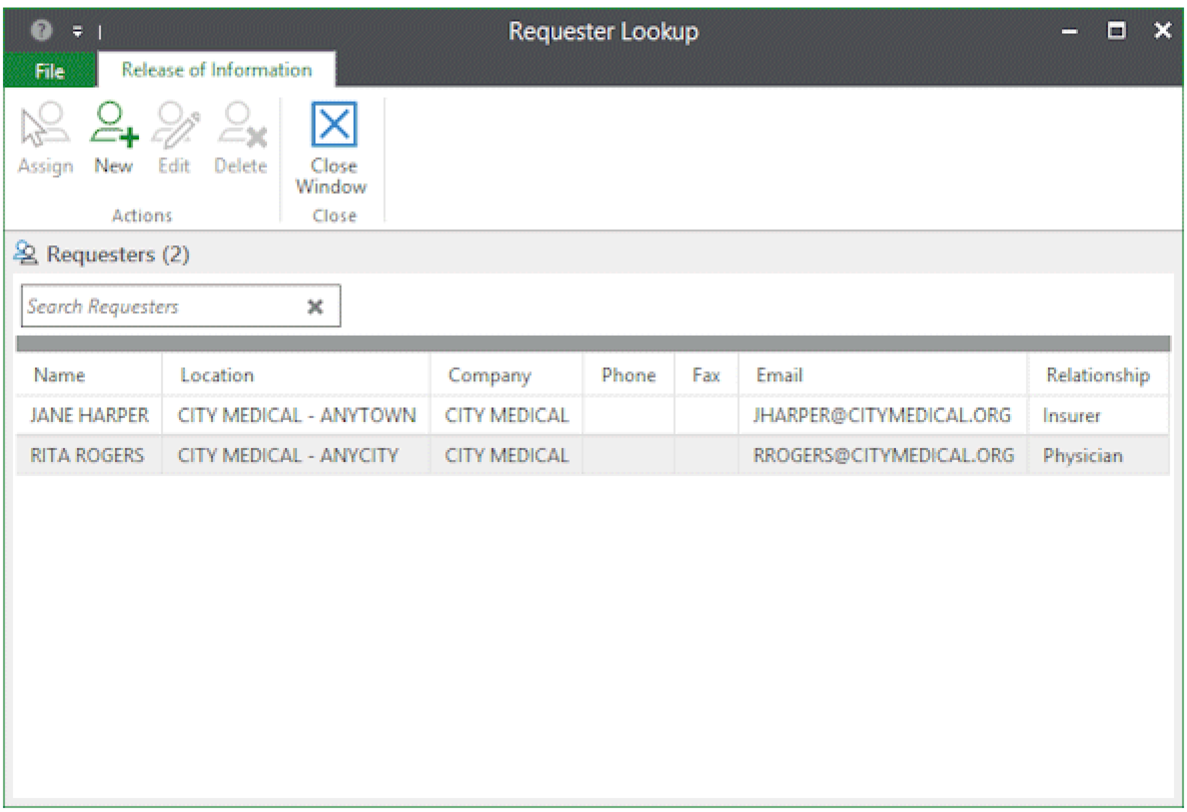


The requester lookup functionality allows you to quickly populate fields in the **Requester Information**, **Shipping Address**, and **Billing Address** sections of a request form. It is recommended you look up requesters when possible, not only to save time, but also to be consistent when entering requester information.

To add existing requester information to a request:

1. From the request form, click the **Requester Lookup** button.

The **Requester Lookup** dialog box is displayed. Available requesters are displayed in the **Requesters** list.



2. Using the **Search Requesters** filter field, enter information about the requester. The available columns determine what information you can use to search for a requester:
   - Name
   - Location
   - Company
   - Phone
   - Fax

- Email
- Relationship

The list is filtered as you type.

3. Do one of the following:
   - Select the requester you want to add to the request. Click the **Assign** button from the **Release of Information** tab.

   - Select the requester you want to add to the request. Right-click and select **Assign**.
   - Double-click the requester you want to add to the request.

   The **Requester Lookup** dialog box is closed, and the requester information is added to the **Requester Information**, **Shipping Address**, and **Billing Address** sections of the request form.

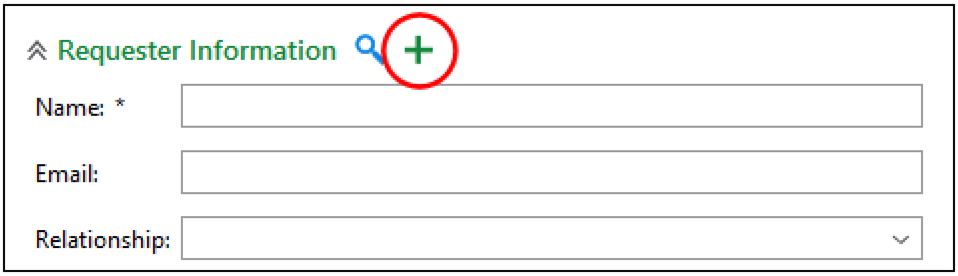
Note: Depending on the selected requester, some or all **Requester Information** fields of the request form are populated.

Creating a New Requester

Requester information can be stored in the system and retrieved for later use. It is considered a best practice to do this for any requester not already stored in the system.

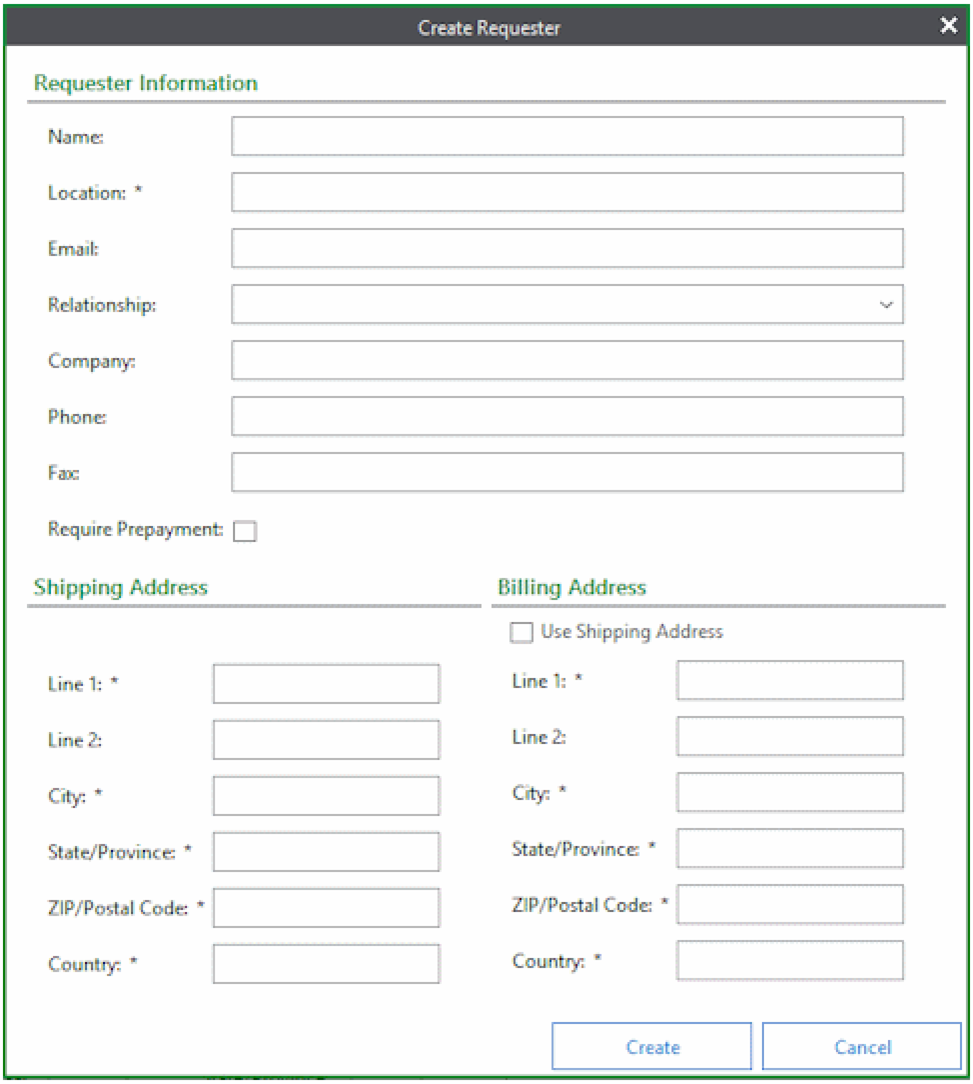
To create a new requester:

1. Do one of the following:
    - Click the **Create Requester** button on the request form.



    - In the **Requester Lookup** dialog box, click the **New** button on the **Release of Information** tab.

    The **Create Requester** dialog box is displayed.



2. Enter the requester information.

Field	Description
Name	The name of the requester.
Location	The requester's location. This field is required.
Email	The requester's email address.
Relationship	The relationship of the requester to the patient.
Company	The company the requester belongs to.
Phone	The requester's phone number.

Field	Description
Fax	The requester's fax number.
Require Payment	Select to require payment from the requester before the request package is released.
Shipping Address	The address for the destination where the request needs to be shipped. A shipping address is required.
Billing Address	The address to be used for billing. If the shipping address and billing address are the same, select the **Use Shipping Address** option. The shipping address information is copied to the billing address fields. A billing address is required.

3. Click **Create** when you have completed the form. The requester is created.

Editing an Existing Requester

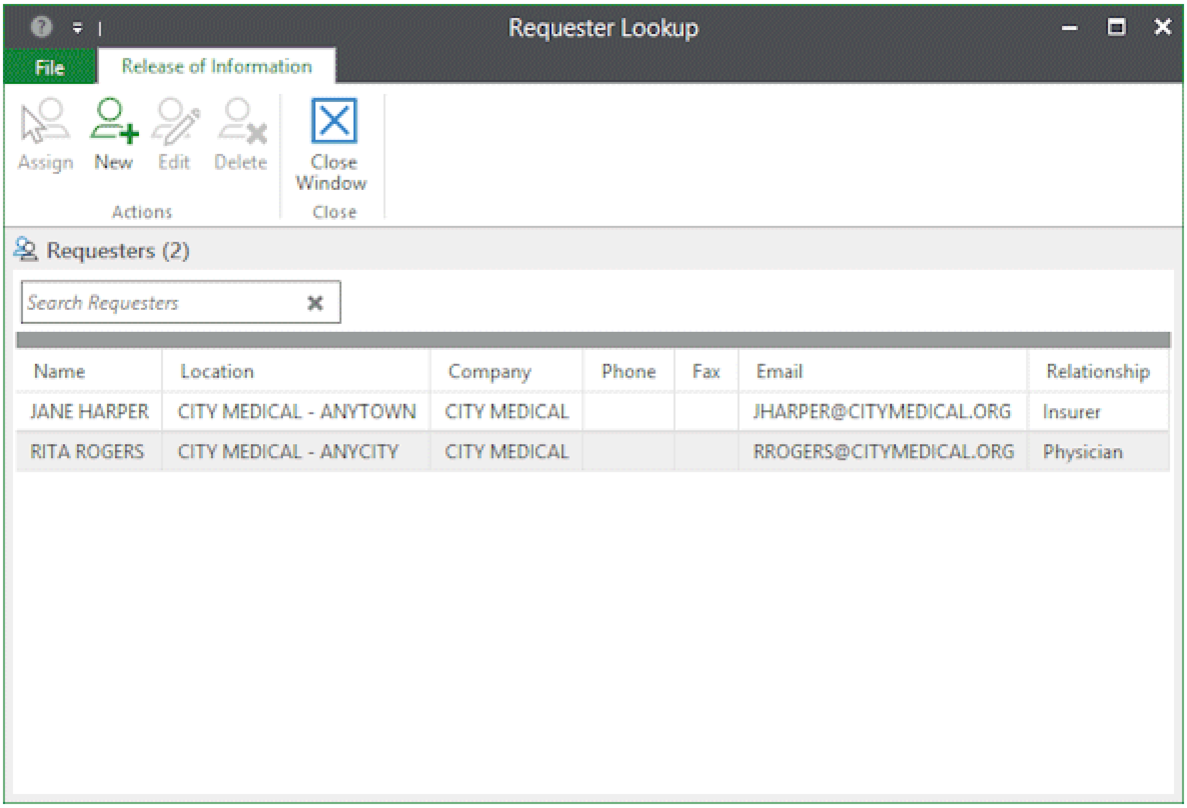
Existing requester information can be updated as needed. The process below outlines how to edit an existing requester.

Note: Editing a requester does not affect existing requests associated with that requester. Requester information is not updated on requests created prior to the changes.

To edit an existing requester:

1. From the request form, click the **Lookup** button.

The **Requester Lookup** dialog box is displayed. Available requesters are listed in the **Requesters** list.



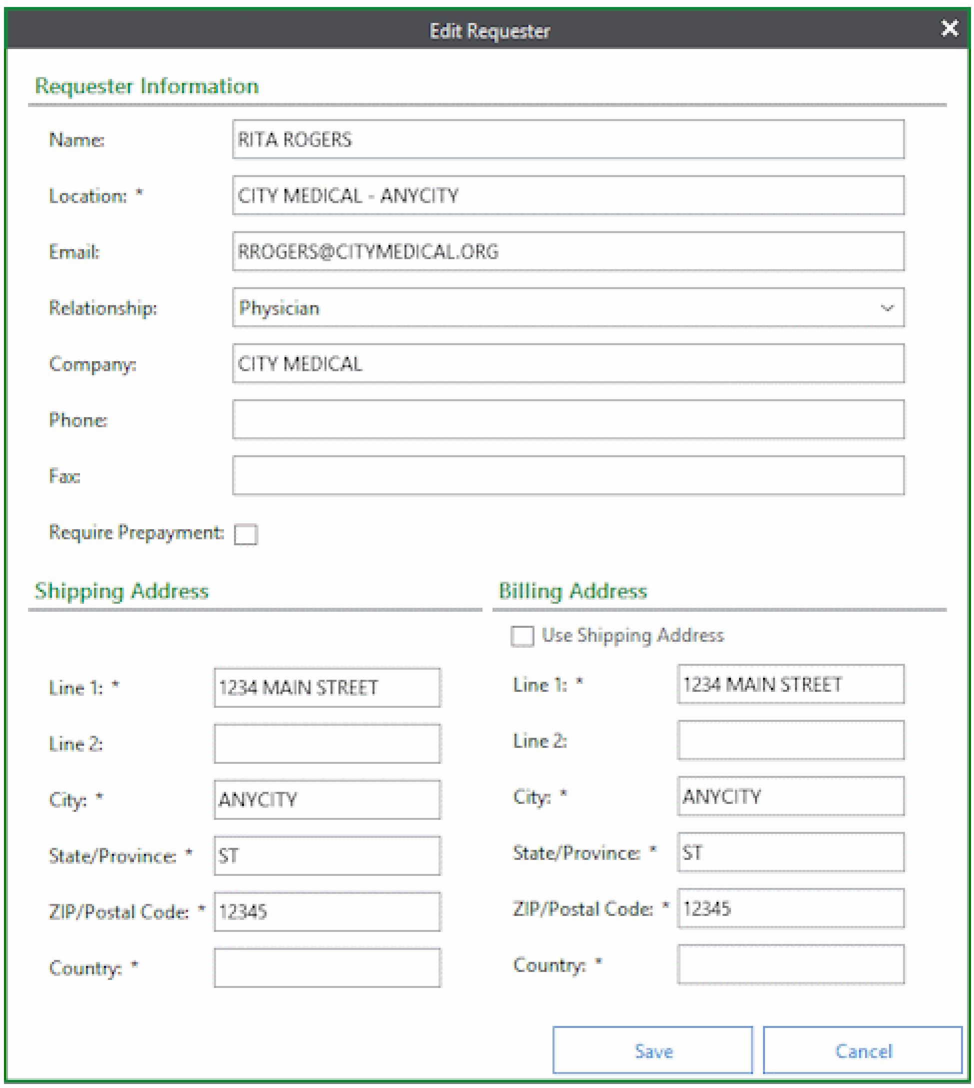
2. Using the **Search Requesters** filter field, enter information about the requester. The available columns determine what information you can use to search for a requester:
   - Name
   - Location
   - Company
   - Phone
   - Fax

- Email
- Relationship

The list is filtered as you type.

3. Select the requester whose information you want to update.
4. Click the **Edit** button from the **Release of Information** tab.

The **Edit Requester** dialog box is displayed.



5. Update the information as needed.
6. Click **Save** when you have completed your changes.

Deleting a Requester

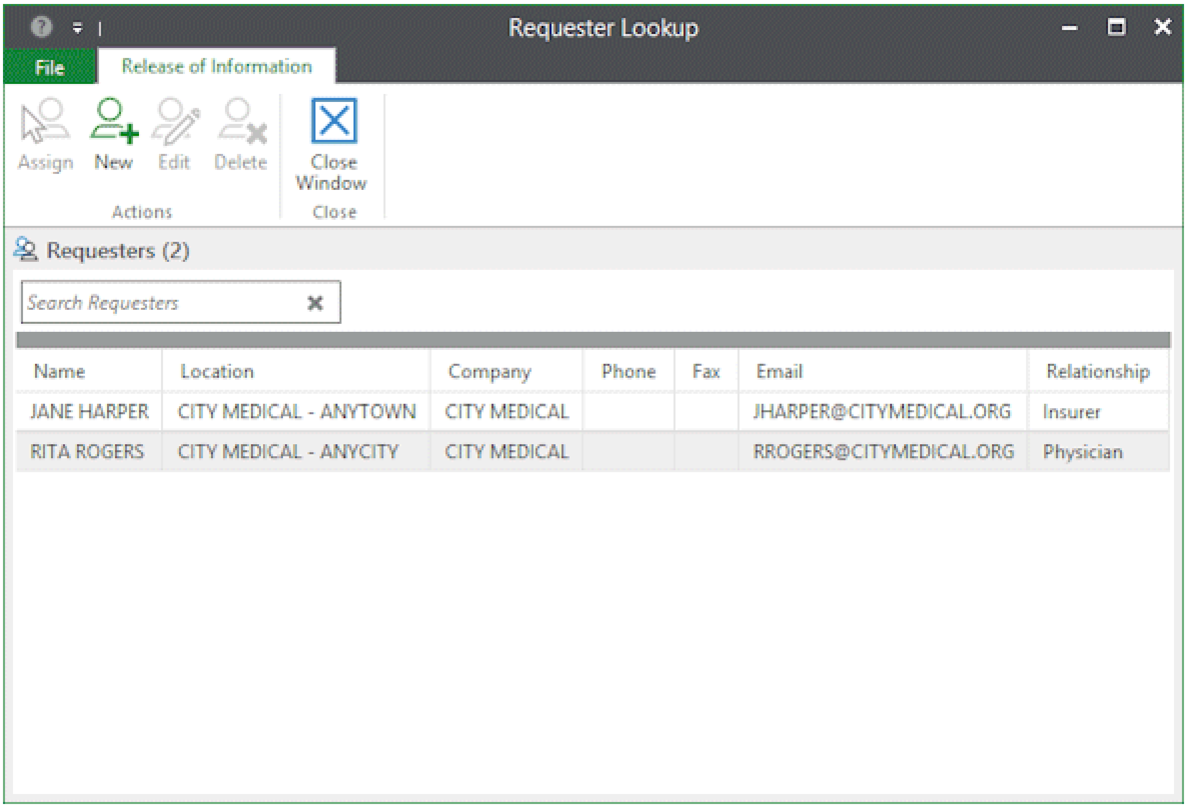
Existing requester information can be removed as needed. The process below outlines how to delete an existing requester.

Note: Deleting a requester does not affect existing requests associated with that requester. Requester information is not updated on requests created prior to the deletion.

To delete an existing requester:

1. From the request form, click the **Lookup** button.

The **Requester Lookup** dialog box is displayed. Available requesters are listed in the **Requesters** list.



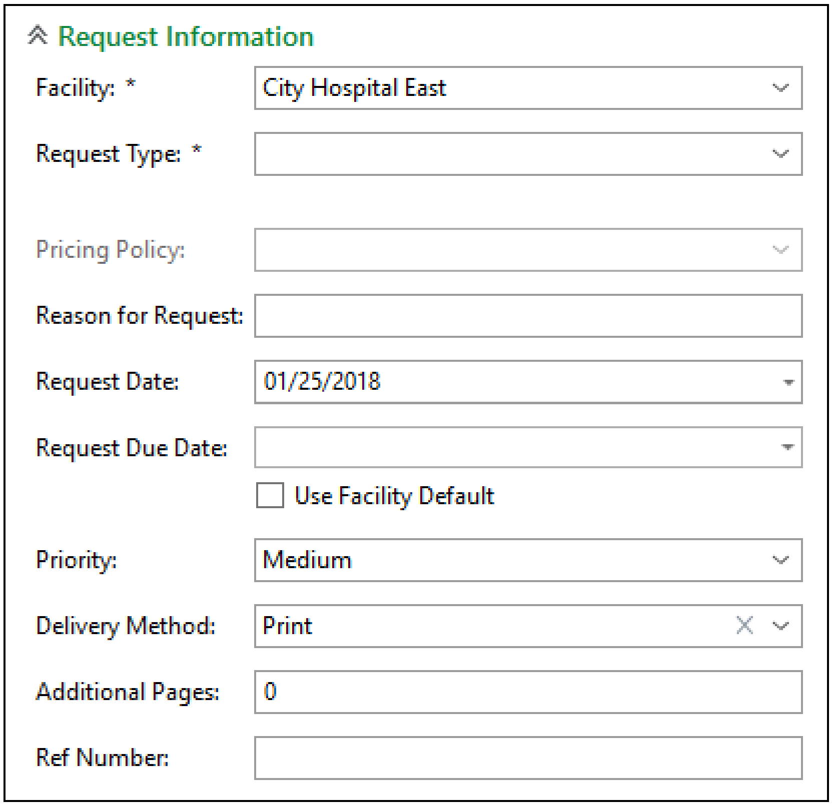
2. Using the **Search Requesters** filter field, enter information about the requester. The available columns determine what information you can use to search for a requester:
    - Name
    - Location
    - Company
    - Phone
    - Fax
    - Email
    - Relationship

    The list is filtered as you type.
3. Select the requester you want to delete.
4. Click the **Delete** button from the **Release of Information** tab.

5. Click **Yes** when prompted to delete the requester. The requester is deleted.

Adding Request Information to a Request

Details entered in the **Request Information** section of a request determine how the request should be handled, priced, and released.



Use the following drop-down lists and fields to configure the request:

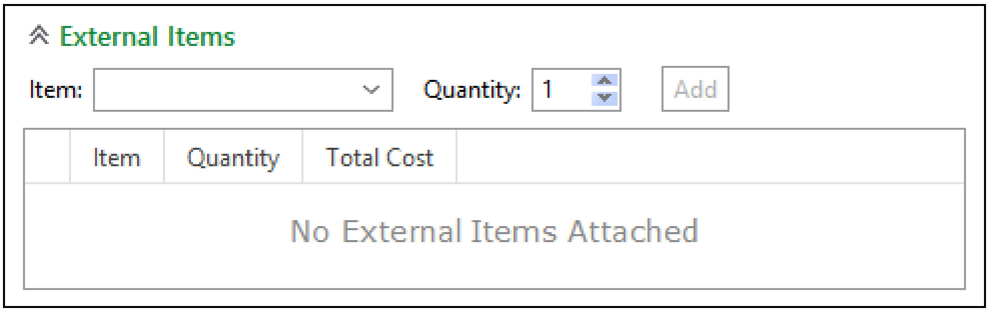
Request Information	Description
Facility	Select the facility where the requested records are located. Depending on your system's configuration, this field may be labeled differently. **Note:** Available facilities depend on your system configuration.

Request Information	Description
Request Type	Select the Request Type to associate with the request. Depending on your selection, one of the following descriptions is displayed beneath the drop-down list: • **Does Not Require Billing** - A request that does not require payment to be released. • **Allow Delivery Before Payment** - A request that can be delivered to the requester before full payment is received. • **Requires Payment Deliver Before Payment** - A request that should only be delivered after receiving full payment from the requester. **Note:** Because available Request Types depend on the selected facility, the **Request Type** drop-down list is disabled until you select a facility. If you change the facility after you select a Request Type, the **Request Type** drop-down selection may be cleared if the selected Request Type is not configured for the newly selected facility. See your system administrator for more information.
Pricing Policy	Select the Pricing Policy to associate with the request. Depending on your system settings, a default Pricing Policy may be populated when you select a Request Type. **Note:** Because available Pricing Policies depend on the selected facility and Request Type, the **Pricing Policy** drop-down list is disabled until you select a facility and a Request Type.
Reason for Request	Describe the reason for the request. Enter up to 255 characters.
Request Date	Enter the date the request was received. You can also select the date by clicking the drop-down arrow displayed on the right side of the field. By default, the **Request Date** is the date the request is created. If the actual request date differs, enter the appropriate date. **Note:** The request date cannot be post-dated. If you enter a future date in the **Request Date** field and attempt to save the request, you are prompted to enter a valid date.

Request Information	Description
Request Due Date	Enter the date the request is due, if applicable. For example, a due date may be necessary if a chart needs to be released in advance of a legal hearing. This field may be populated automatically depending on the settings configured for the selected facility. To enter a different due date, clear the **Use Facility Default** check box. You can select the date by clicking the drop-down arrow on the right side of the field. If provided, the due date must be later than the request date.
Use Facility Default	Select this check box to calculate the **Request Due Date** field automatically using the settings configured for the selected facility. Clear this check box to ignore the facility's settings and enter a specific due date. If the facility is not set up for default due dates, then selecting **Use Facility Default** clears out the **Request Due Date** field, and the request has no due date. This check box is available only if at least one facility in your system is set up for default due dates.
Priority	Select the urgency for the request to be completed. The following options are available: • High • Medium • Low The default priority is **Medium**. These options are not configurable.
Delivery Method	Select the method for sending the request to the requester. The following options are available: • Print • Fax • Forward • Pickup • Mail • Express Mail • Office Mail These options are not configurable.
Additional Pages	Enter the number of additional pages that need to be added to the request, if applicable. Additional pages are external pages that are added to the request outside of the OnBase ROI process.
Ref Number	Enter a reference number for the request, if applicable. The reference number is an external tracking number that may have been provided to you for the request.

Adding External Items to a Request

When creating an ROI request, you can calculate the cost of external, non-paper items needed for the request using the **External Items** functions on the request form.



External items can include items such as X-rays, MRIs, radiology CDs, and CT scans. Available external items depend upon the selected facility. See your system administrator for more information.

To add an external item to a request, from the **Release of Information** form:

1. From the **Item** drop-down list, select the appropriate item.
2. In the **Quantity** field, enter the quantity of the item you are sending. You can also use the arrow buttons to adjust the quantity.

   By default, **1** is displayed in the **Quantity** field.
3. Click the **Add** button.

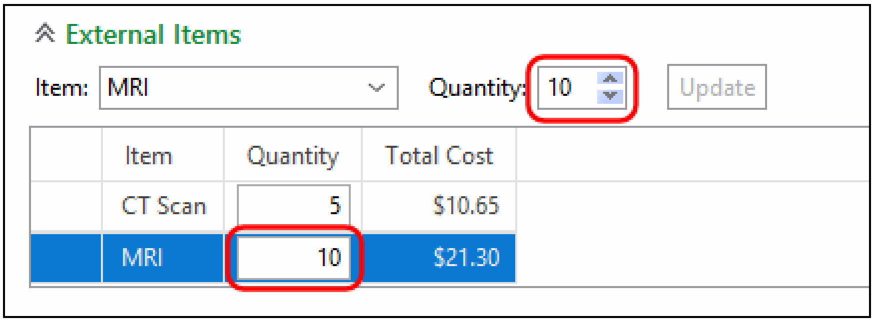
   The item is added to the **External Items** list. The quantity and total cost of the item are reflected in the **Quantity** and **Total Cost** columns, respectively. The **Total Cost** column reflects the quantity of an item multiplied by the configured cost of that item.
4. Repeat the process as necessary.

Tip: Click a column header to sort the list by that column in either ascending or descending order. You can also change the way the list is displayed by clicking and dragging the border of a column and changing its width. Customizations you make to the list are automatically saved. To return to the default display, right-click the list and select **Clear Customizations**.

Modifying an External Item

To modify an external item:

1. From the request form, select the appropriate external item from the **External Items** list.
2. Click in the **Quantity** field either within or above the list.



3. Enter a new quantity in the **Quantity** field.

Tip: You can revert to the previous quantity by pressing **Esc**, as long as you have not pressed **Enter** or clicked **Update** to accept the new quantity.

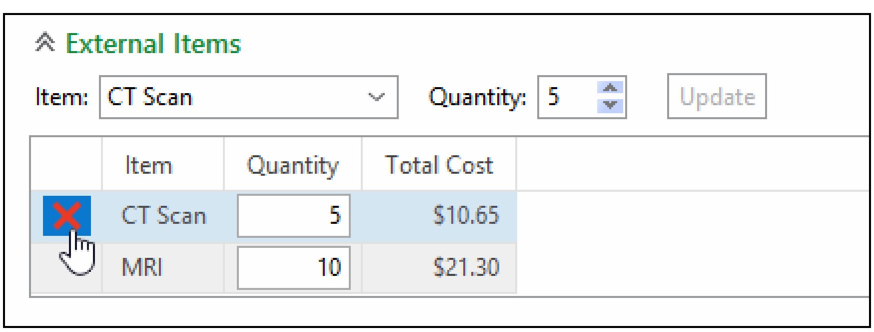
---

4. Press **Enter**.
   The **Quantity** and **Total Cost** columns of the item are updated. The **Total Cost** column reflects the quantity of an item multiplied by the configured cost of that item.

Removing an External Item

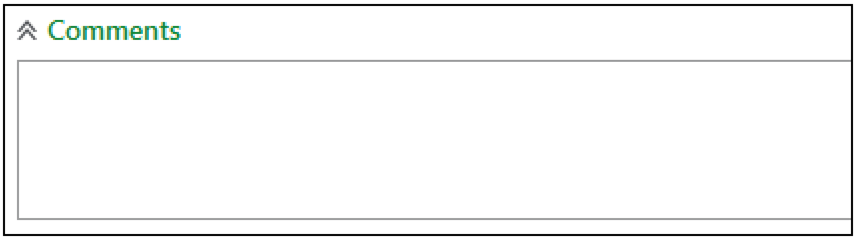
To modify an external item:

1. From the request form, select the appropriate external item from the **External Items** list.
2. Do one of the following:
   - Enter a quantity of **0**.
   - Leave the quantity blank.
   - Move the cursor over the appropriate item and click the **X**.



Adding Comments to a Request

While working on a request, you may have the need to log comments, such as notes on communication, your progress, or issues that arise. For example, you may want to confirm that you have verified the ID of the requester. These comments can be added to the **Comments** field, located at the bottom of the request form.



Tip: It is considered a best practice to adhere to a consistent standard when adding comments to requests.

Saving a Request

A request can be saved once the following criteria is specified on the request form:

- Patient Name
- Requester Name
- Facility
- Request Type
- Pricing Policy

Once the required information is entered, you can save the request by clicking the **Save** button on the **Release of Information** tab.

A request is also automatically saved after you perform any of the following actions:

- Canceling or rejecting the request
- Finalizing the request
- Placing the request on hold
- Assigning or unassigning the request
- Printing an invoice
- Printing the request
- Receiving a payment

Once a request is saved, it is available from the Release of Information layout. Requests cannot be deleted after they are saved.

Attaching Charts and Documents to a Request

Charts and documents are attached to a Release of Information request one of two ways:

- During request creation (see Creating an ROI Request on page 320 for more information).
- From within the Release of Information layout.

Note: When you attach a document to a request, the most recent revision available at that time is attached. If there is another revision created after you attach the document and you would prefer the latest revision, remove previous revision attached to the request and reattach the document. The same is true for non-revisable documents. If a page is added or removed after the document is attached to the request, the change is not reflected in the attached document. The document must be removed and reattached in order for the request to reflect the changes.

If you did not create a request using selected charts or documents from the Medical Records Unity Client, or if you would like to attach additional charts and documents to an existing request, you can do so within the Release of Information layout. See the following sections for more information:

- Attaching Charts and Documents Using the Wizard on page 349
- Attaching Documents Using a Custom Query on page 355
- ROI and the Virtual Print Driver on page 408
- ROI and Report Capture for Meditech on page 417

Attaching Charts and Documents Using the Wizard

Note: This functionality requires an HL7 Listener license. If you do not have an HL7 Listener license, documents can only be added to requests using Custom Queries or the Virtual Print Driver. For more information, see Attaching Documents Using a Custom Query on page 355 and ROI and the Virtual Print Driver on page 408.

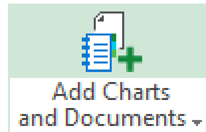
The following process describes how to add charts and documents to a request using the **Add Attachments** wizard. This process can also be used to update an existing attachments list.

When using the wizard to update the attachments list of a request, be aware of the following:

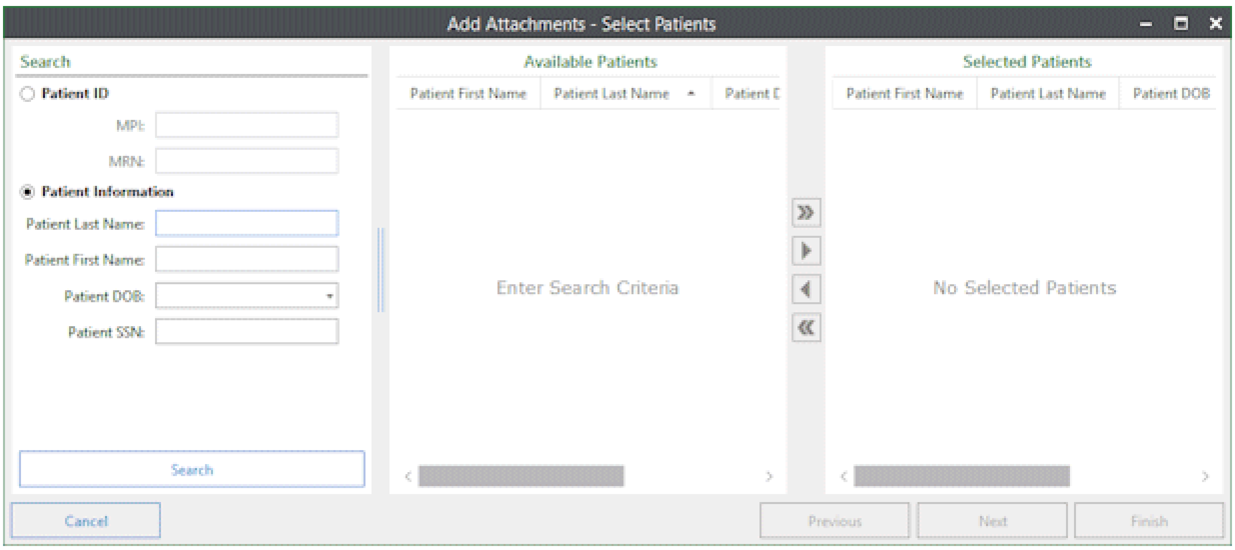
- Removing previously selected Document Types removes documents belonging to those Document Types from the request.
- If a newer revision of an attached document is available, the attachment process replaces the previous revision with the new revision.

To attach charts and documents to a request:

1. From an open request, click the upper half of the **Add Charts and Documents** button.



The **Add Attachments - Select Patients** dialog box is displayed.

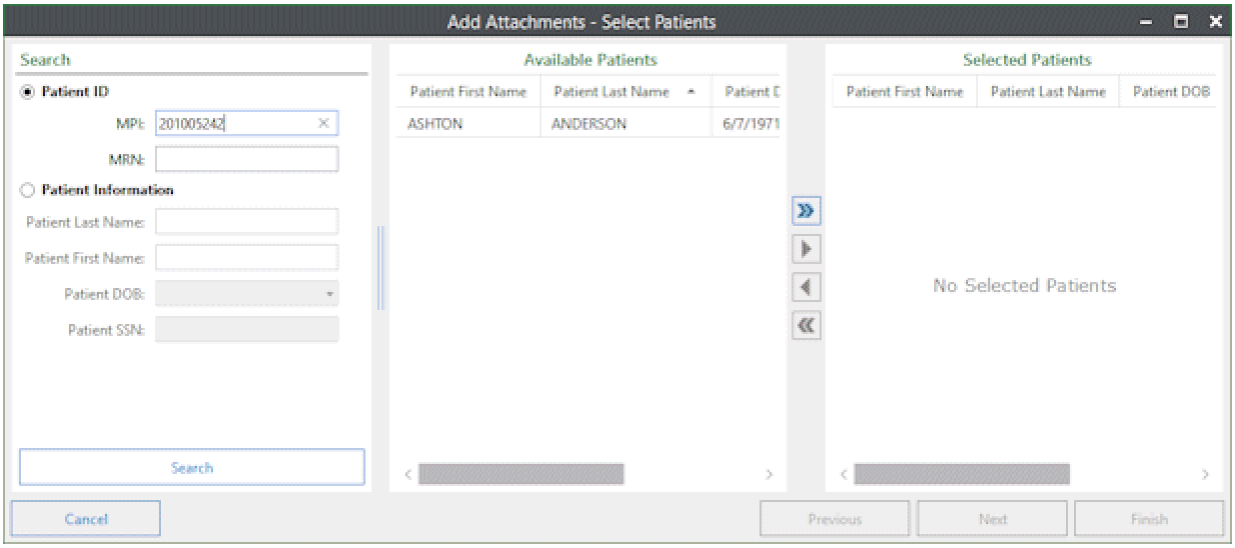


2. If patients are already selected, verify the **Selected Patients** list is accurate. To add more patients, continue to the next step. Otherwise, skip to step 6.
3. To search for patients, select one of the following options:
   - **Patient ID** - allows you to enter the patient's **MPI** and/or **MRN**, depending upon your system's configuration.
   - **Patient Information** - allows you to enter the patient's **First Name**, **Last Name**, **Date of Birth**, and/or **SSN** (Social Security Number).

Note: Depending on your system's configuration, the fields and display columns in the **Add Attachments - Select Patients** dialog may be labeled differently from what is displayed in the screen shot above.

4. Enter the appropriate information and click **Search**.

   Patient records matching the criteria are displayed in the **Available Patients** list. These records identify the patient whose information you are releasing.

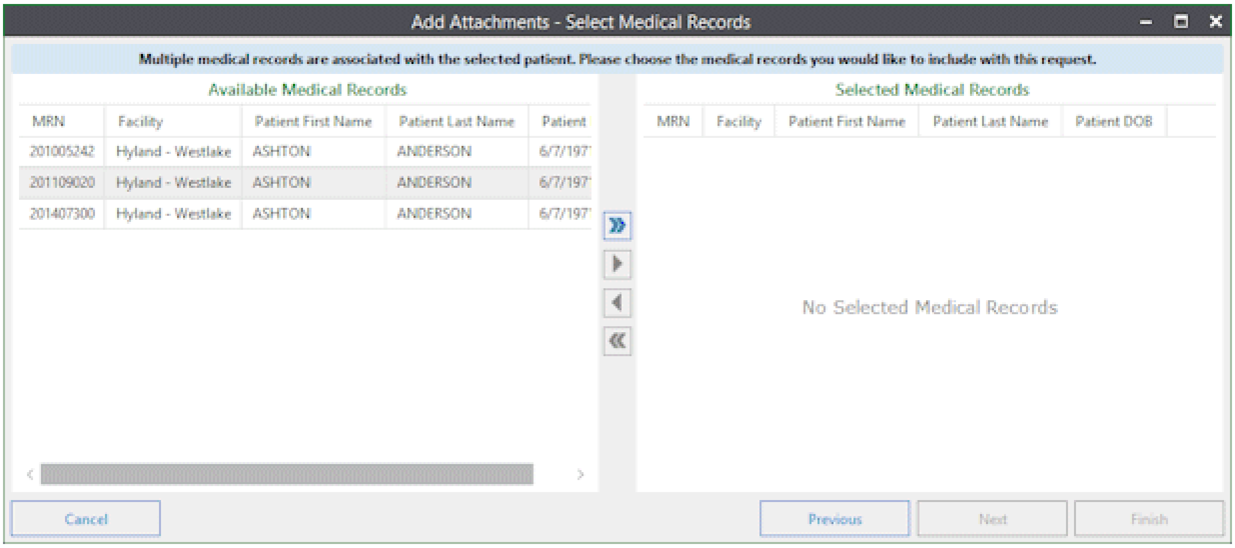


Note: If **(Multiple)** appears in the MRN column, there are multiple MRNs associated with the retrieved record. Rest your pointer over **(Multiple)** to display all the MRNs associated with the record.

5. Do one of the following:
   - To add all available patient names displayed in the **Available Patients** list, click the **Add All Items** button.
   - To add one or more patient names displayed in the **Available Patients** list, select the appropriate patient from the list and click the **Add Selected Items** button.

   The patients you added are displayed in the **Selected Patients** list. To remove all patients from this list, click the **Remove All Items** button to remove all patients. To remove one or more patients, select the appropriate patients and click **Remove Selected Items** button.

6. Click **Next**. If multiple medical records are associated with the selected patients, the **Add Attachments - Select Medical Records** dialog box is displayed.

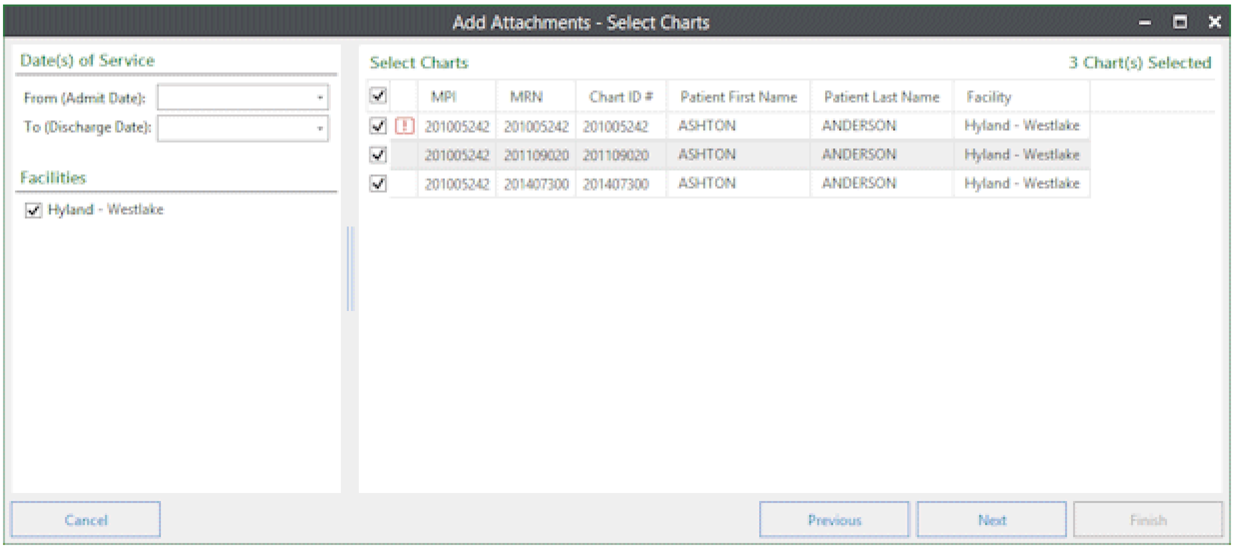


7. Select the appropriate medical records by doing one of the following:
   - To add all available medical records displayed in the **Available Patients** list, click the **Add All Items** button.
   - To add one or more medical records displayed in the **Available Patients** list, select the appropriate records from the list and click the **Add Selected Items** button.

   The medical records you added are displayed in the **Selected Patients** list. To remove all medical records displayed in this list, click the **Remove All Items** button to remove all records. To remove one or more records, select the appropriate records and click **Remove Selected Items** button.

8. Click **Next**. The **Add Attachments - Select Charts** dialog box is displayed. The **Select Charts** list displays and selects the charts belonging to the patients you selected in the previous step. If a patient does not have any charts, no charts are selected.

   Charts with unresolved deficiencies are listed in red with an exclamation point icon ! beside them.



Note: If you have previously added other charts to the request, only those charts are selected. For example, if you go through the wizard and select two charts from **Sam Brooks**, and then go through the wizard again and add **April Adams** to the **Selected Patients** list, charts from **April Adams** are displayed but not selected in the **Select Charts** list.

Tip: A deficiency indicates the chart is incomplete in some way. Before selecting and releasing a chart with deficiencies, you should see if the deficiencies can be resolved. For more information on deficiencies, see the Medical Records Unity Client documentation.

9. To filter available charts by date range, enter or select dates in the **Date(s) of Service** fields. Charts are automatically filtered from the list after you enter or select a date in either the **From (Admit Date)** field or **To (Discharge Date)** field.
   - The **From (Admit Date)** field searches dates the patient was admitted.
   - The **To (Discharge Date)** field searches dates the patient was discharged
10. To select from charts associated with specific facilities, select the appropriate facilities from the **Facilities** list. Available facilities are based on the available charts in the **Select Charts** list prior to filtering.

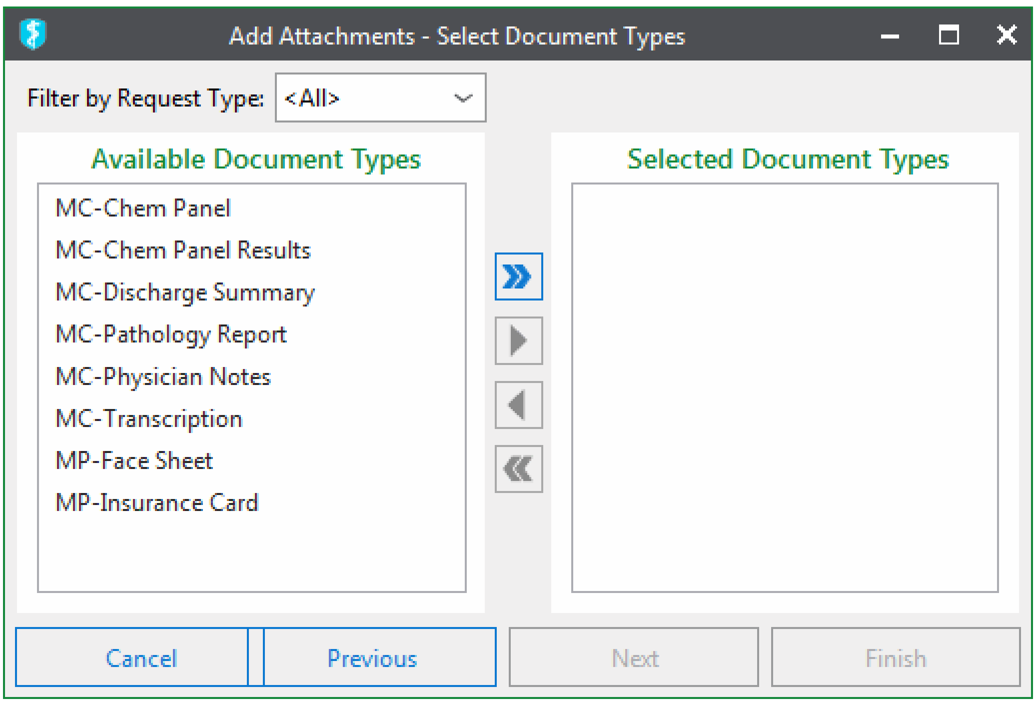
11. Select the appropriate charts from the list if they are not already selected. To select all charts displayed in the **Select Charts** list, click the check box in the column header, located in the upper-left corner of the list.

Note: Clicking the check box in the column header only selects charts displayed in the **Select Charts** list. If you have filtered charts out of the **Select Charts** list, those charts cannot be selected.

To deselect already selected charts, click the check box for the appropriate chart, or deselect the check box in the column header to deselect all charts.

Note: A chart does not need to be selected to only attach documents to the request.

12. Click **Next**. The **Add Attachments - Select Document Types** screen is displayed.



Note: Depending on your system settings, the Document Types list may be filtered to only display Document Types associated with the selected charts.

13. Filter the list of available Document Types by Request Type by selecting the **Filter by Request Type** drop-down list.

14. Add the Document Types you want to include on the request by doing one of the following:
    - To add all available Document Types displayed in the **Available Document Types** list, click the **Add All Items** button.
    - To add only Document Types displayed in the **Available Document Types** list, select the appropriate Document Types from the list and click the **Add Selected Items** button.

Note: If a Request Type has been selected for the request, its corresponding Document Types are automatically selected and displayed in the **Selected Document Types** list.

The Document Types you added are displayed in the **Selected Document Types** list. To remove all Document Types displayed in this list, click the **Remove All Items** button. To remove one or more Document Types, select the appropriate Document Types and click **Remove Selected Items** button.

15. Click **Finish**. The appropriate documents are attached to the request. This process may take a while if you are attaching a large number of documents.

Note: If a newer revision of an attached document is available, the attachment process replaces the previous revision with the new revision. When this occurs, any page exclusions applied to the document are cleared. If the system notifies you that this occurred, it is recommended that you review the affected document to evaluate whether any pages should be excluded again. For more information on excluding pages of a document, see the section on excluding pages from release.

Note: You can only view and attach documents you have rights to view. See your system administrator for more information.

Note: If your system is licensed for Report Capture for Meditech and you have attached Document Types containing external system documents, the external documents must be retrieved. Depending on your settings, this may process may begin automatically upon closing the request, or you may need to manually select to retrieve the documents. For more information on retrieving external system documents, see ROI and Report Capture for Meditech on page 417.

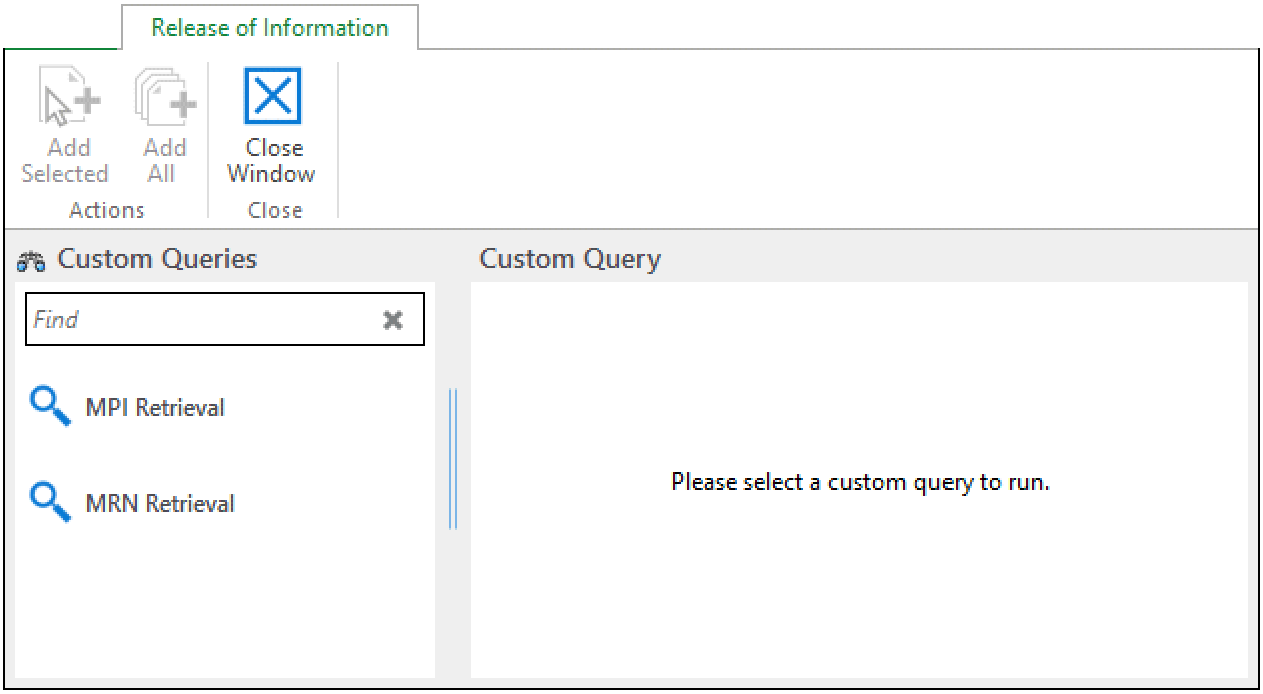
Attaching Documents Using a Custom Query

Documents can be attached to a request using available Custom Queries. Custom Queries are predefined sets of search criteria that allow you to quickly access documents. They are configured by your system administrator.

To attach a document to a request using a Custom Query:

1. From an open request, click the **Add From Custom Query** button from the **Release of Information** tab.

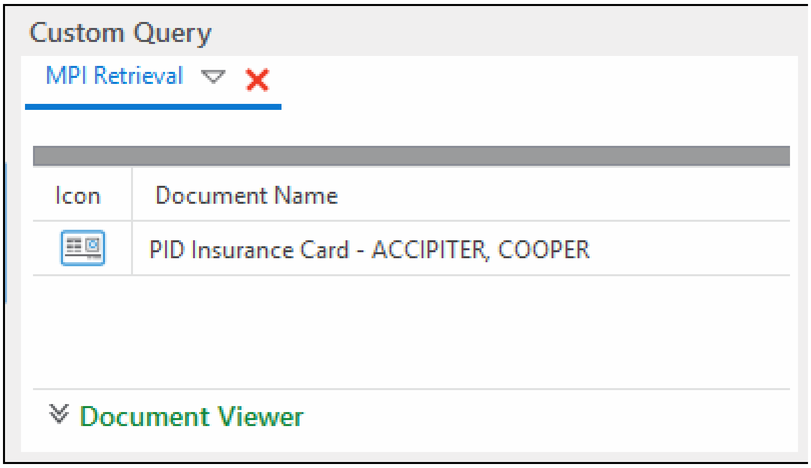
   The **Add From Custom Query** dialog box is displayed.



2. Do one of the following:
   - Select a Custom Query from the **Custom Queries** list.
   - Search for a Custom Query by entering the name of it in the **Find** field. The list of available Custom Queries is updated as you type. Select the appropriate Custom Query.

   The Custom Query form is displayed. Forms differ depending on how they were configured.
3. Complete the form as necessary according to the instructions (if applicable) and available fields, and click the **Search** button.

4. Documents that meet the search criteria are displayed, along with the name of the Custom Query.



Your system may be configured to automatically display one of the selected documents in the Document Viewer.

Depending on a Custom Query's configuration, documents that meet the search criteria may be automatically grouped by one of the display columns.

Note: If a Keyword Type that is used as a display column has more than one value for a document, the document is listed for each Keyword Value.

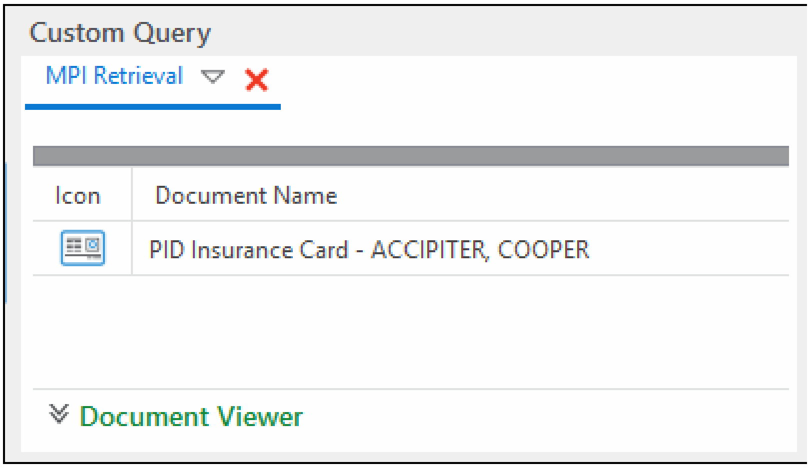
5. To add documents to a request from the displayed Custom Query, do one of the following:
    - Select one or more of the documents as needed. Click the **Add Selected** button from the **Release of Information** tab.
    - Click the **Add All** button from the **Release of Information** tab to add all documents in the results list to the request.

    You are notified the list of attached documents was updated successfully. When you are finished, click the **Close Window** button to exit and return to the request.

Note: The **Add Selected** and **Add All** buttons only apply to the currently displayed Custom Query results list.

Viewing Documents Within the Custom Queries Interface

Before attaching documents to a request from the **Add From Custom Query** dialog box, you can view documents in the results list.



To view a document returned from a Custom Query, do one of the following:

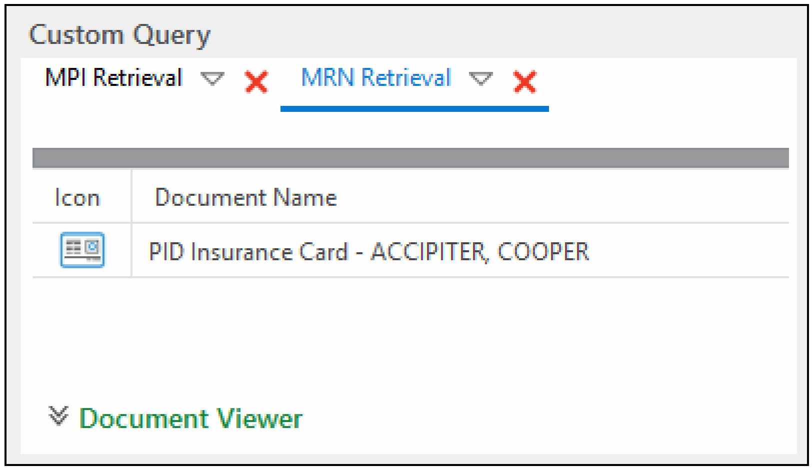
- Select the appropriate document and expand the Document Viewer to display the document.
- Double-click the appropriate document to open it in a new viewer.

When you are viewing a document, you can add and edit notes on the documents using the **Document** tab, as well as access options associated with the file format of the document (e.g., the **Text** or **Image** tab may become available).

Note: For more information on viewing documents, using the **Document** tab, and working with notes, see the Medical Records Unity Client documentation.

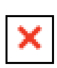
Navigating the Custom Queries Interface

When conducting multiple Custom Queries, results for each Custom Query are retained on their respective tabs.

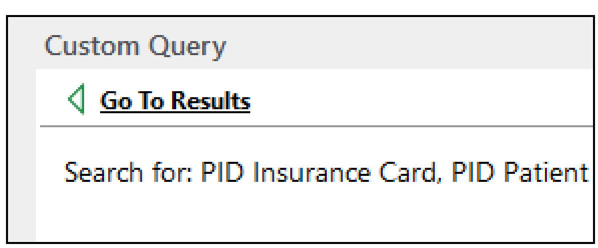


Note: Results are retained until you close the **Add From Custom Query** dialog box.

Each tab contains the following buttons:

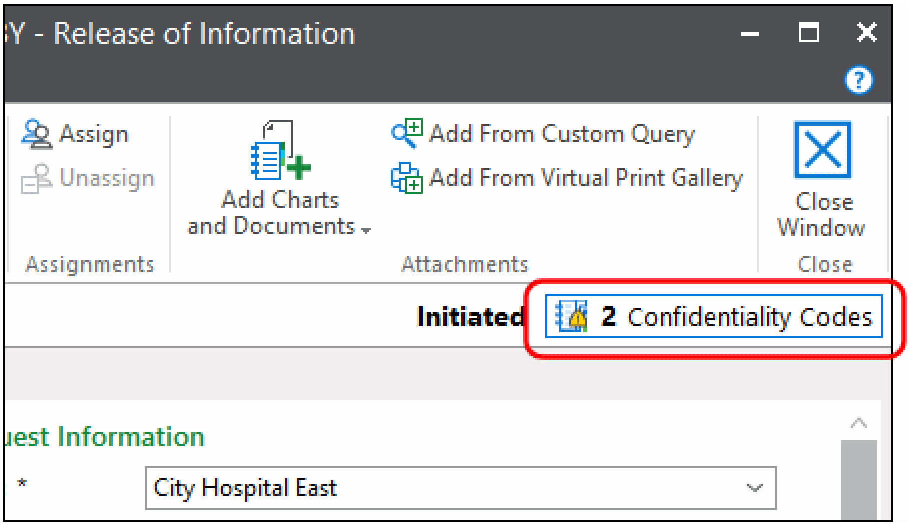
Button	Description
	Click to access the **Refresh** button and refresh Custom Query results.
	Click to close the Custom Query results. The displayed results are no longer available.

If you select a Custom Query from the **Custom Queries** list, you can return to the results lists by clicking **Go To Results** in the **Custom Query** pane.

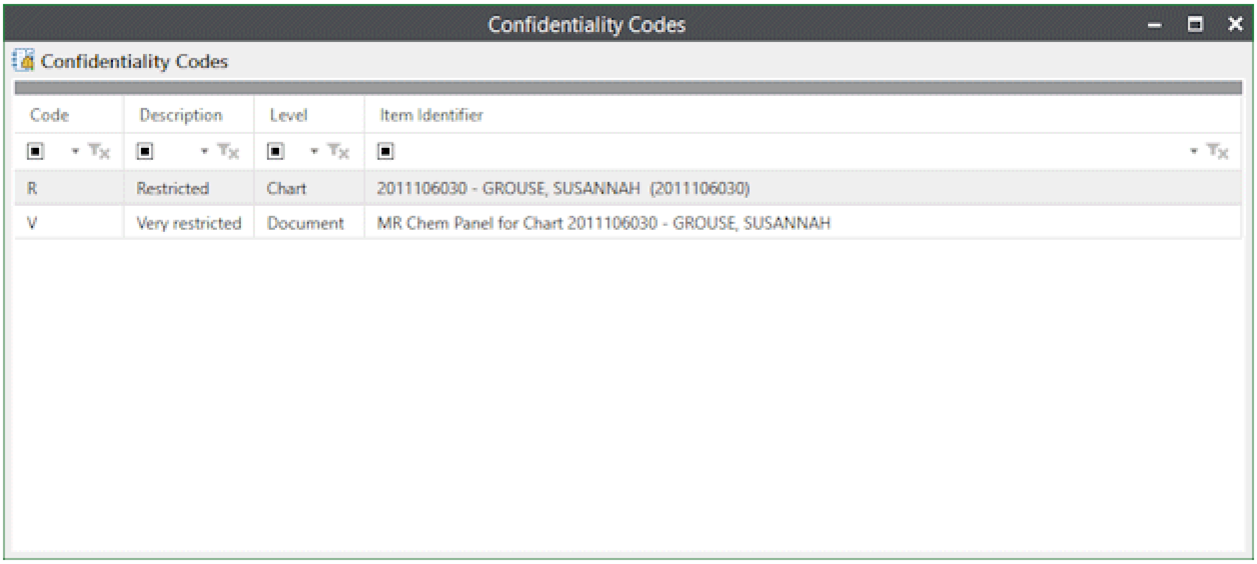


Viewing Confidentiality Codes

Confidentiality codes can be used to classify patients, charts, and documents as confidential. In the Medical Records Unity Client, ROI requests may display a confidentiality code notifier indicating that there are confidential items attached to the request.



Click the notifier to view information about confidential attachments.



Information is displayed in the following columns:

Column	Description
Code	The HL7 code for the confidentiality code.
Description	The description of the confidentiality code as configured in OnBase.
Level	The level at which the confidentiality code is applied. Possible values are: • **Patient**—The code is applied to the entire patient record. • **Chart**—The code is applied to a specific chart. • **Document**—The code is applied to a specific document.
Item Identifier	The name or ID number for the confidential item. • For patient-level codes, this column provides the patient's MPI number. • For chart-level codes, this column provides the chart's title. • For document-level codes, this column provides the document's auto-name.

Removing Confidential Attachments

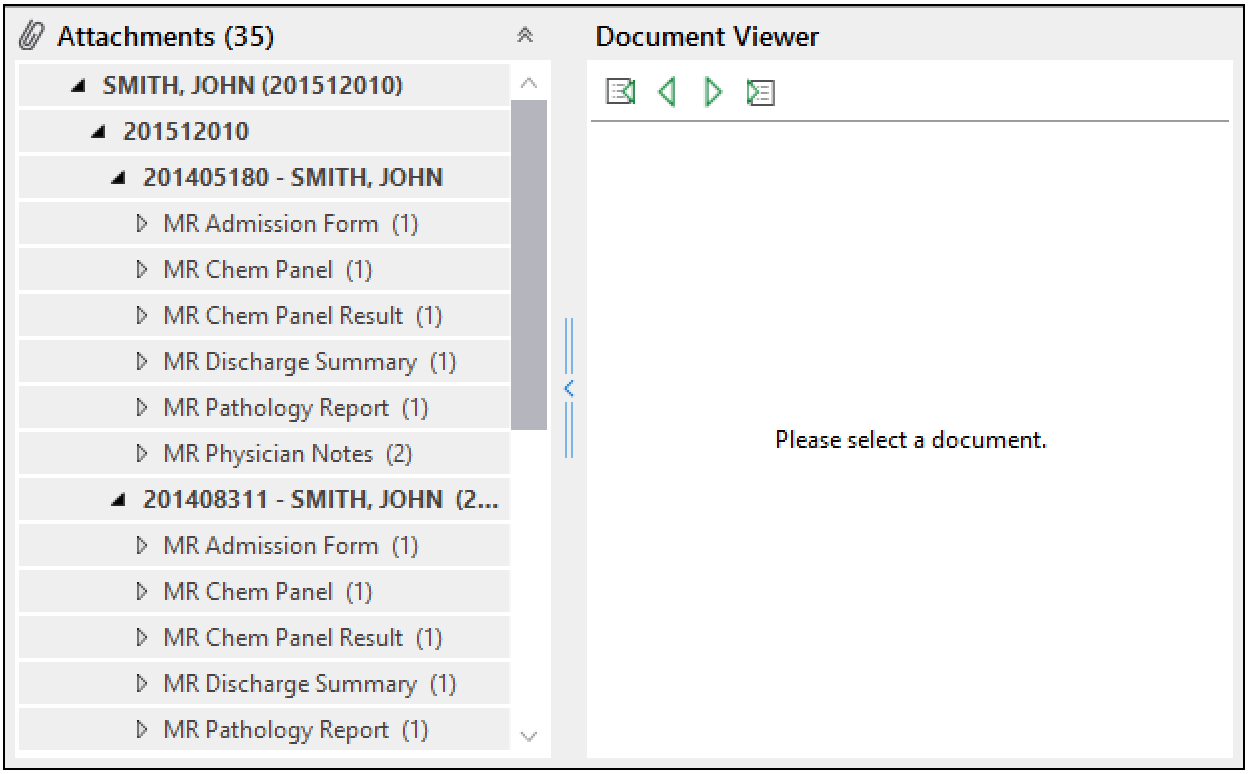
If you need to remove an attached patient, chart, or document as a result of a confidentiality code, see Removing Attached Documents on page 368.

Managing Existing Attachments

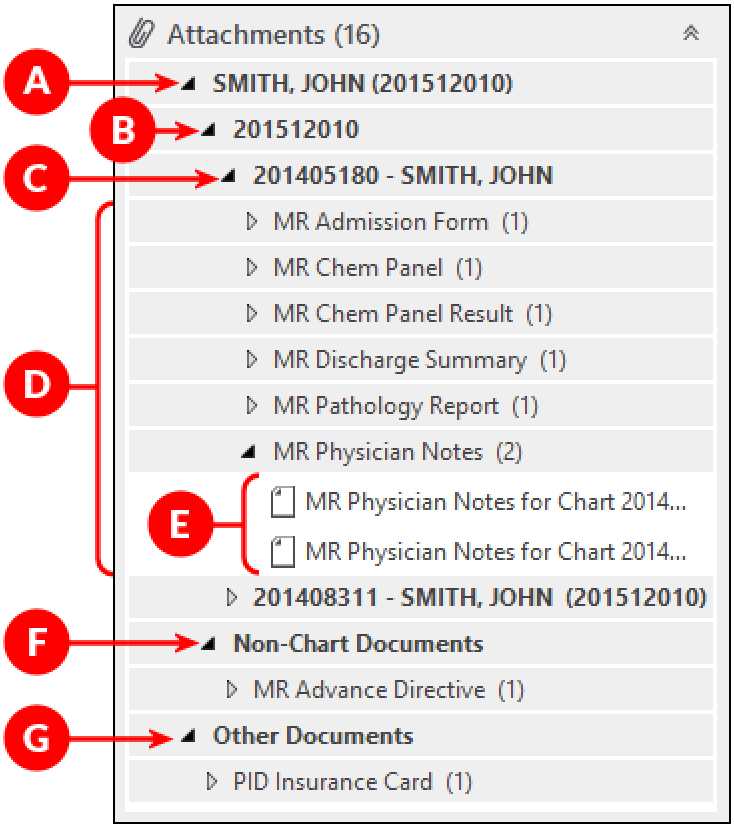
After attaching charts and documents to a request, depending on your rights, you can view documents and remove any unnecessary attachments.

To view a list of existing attachments on a request, from an open request, click the **Attachments** button from the **Release of Information** tab.

The **Attachments** list is displayed.



The following diagram provides more information on the **Attachments** list. For this example, MPI is the system patient ID method.



Element	Description
A	The patient name and MPI number. In a system where MRN is the patient ID method, the MRN is displayed instead.
B	The patient MRN number. In a system where MRN is the patient ID method, this level is not displayed.
C	The patient chart.
D	The attached Document Types. Document Types are listed for each chart, for the **Non-Chart Documents** level, and for the **Other Documents** level. The number displayed after the Document Type indicates how many documents of that Document Type have been attached for that chart or document level.
E	The names of attached documents, which are displayed when a Document Type is expanded.

Element	Description
F	The **Non-Chart Documents** level, which includes patient-level documents. These are medical record documents not associated with any chart. For more information on clinical patient documents, see the Medical Records Unity Client documentation.
G	The **Other Documents** level, which can include non-medical record documents. These non-medical documents are not associated with any chart or patient.

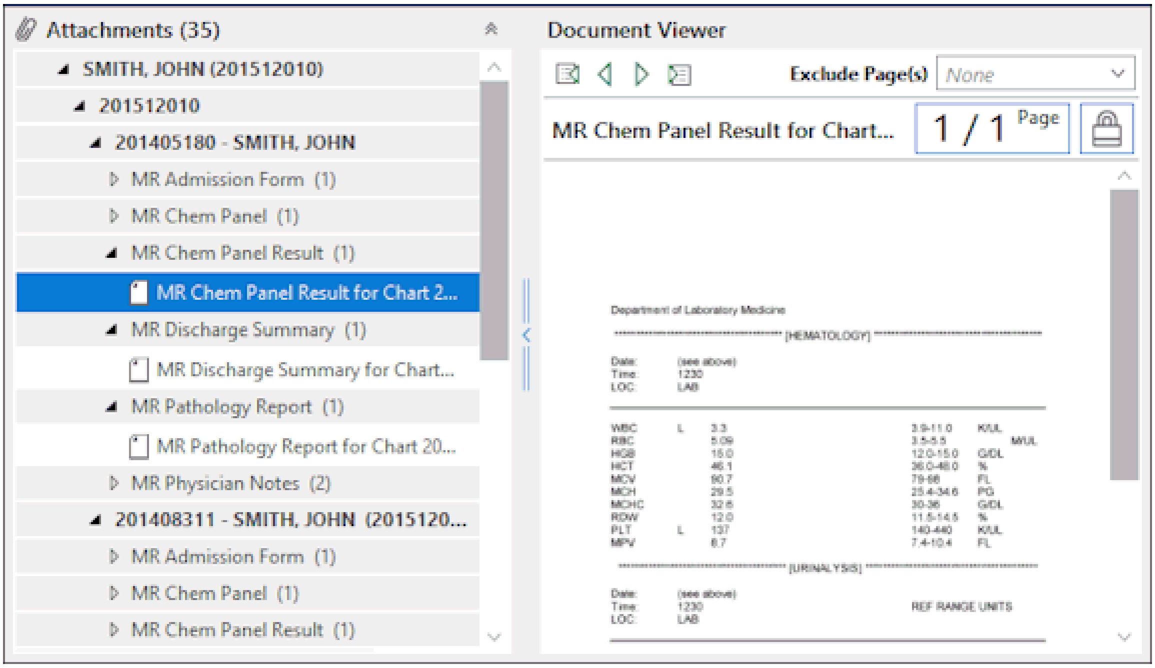
Viewing and Navigating Attachments

You can view and quickly navigate contents of documents listed in the **Attachments** list.

To view documents from the **Attachments** list, click the appropriate Document Type to display its documents. To expand all items in the list, collapse all items in the list, or restore the list to the default view, right-click within the list, and select one of the following options:

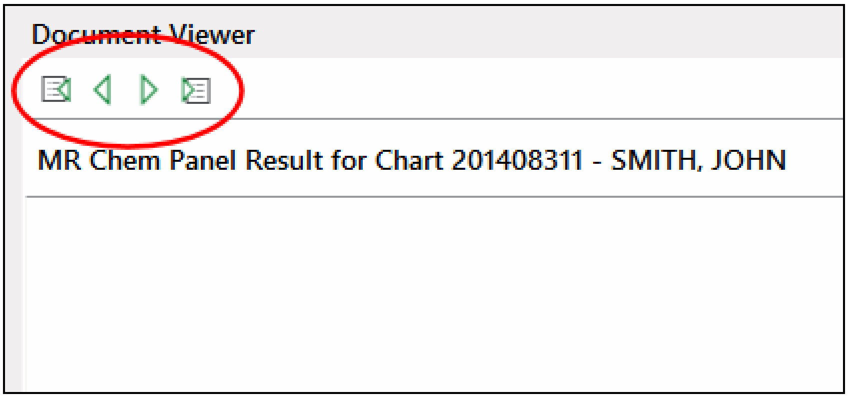
Option	Description
Collapse All	Collapses all items in the **Attachments** list, so that only the top-level items are displayed.
Expand All	Expands all items in the **Attachments** list, so that all MPIs / MRNs, charts, Document Types, and documents are displayed.
Reset to Default	Resets the **Attachments** list to the default view.

Select a document to view it in the **Document Viewer** pane or in an external viewer, depending on the type of document you are viewing.



Once you have selected a document, you can add and edit notes on the documents using the **Document** ribbon tab. For information on using the document viewer and working with notes, see the Medical Records Unity Client documentation.

To quickly navigate to pages of a selected document or to previous and next documents in the list, use the buttons located at the top of the document viewer. You can also use the **Up** and **Down** arrow keys to quickly navigate to and view documents in the **Attachments** list.



Document list navigation buttons and their keyboard shortcuts are described in the following table:

Button	Description	Keyboard Shortcut
	**Previous Document** displays the previous document in the attachments list. If the first document in the list is selected, clicking **Previous Document** displays the last document in the attachments list.	CTRL+SHIFT+PAGE UP
	**Next Document** displays the next document in the attachments list. If the last document in the list is selected, clicking **Next Document** displays the first document in the list.	CTRL+SHIFT+PAGE DOWN

Page navigation buttons and their keyboard shortcuts are described in the following table:

Button	Description	Keyboard Shortcut
	For multi-page text or image documents, **Previous Page** displays the previous page in the current document. If you are on the first page of a text or image document (or if you are viewing a document with a different file format), **Previous Page** displays the previous document.	CTRL+PAGE UP
	For multi-page text or image documents, **Next Page** displays the next page in the current document. If you are on the last page of a text or image document (or if you are viewing a document with a different file format), **Next Page** displays the next document.	CTRL+PAGE DOWN
[None]	Using your mouse wheel, you can quickly zoom in on or zoom out of a document. While pressing CTRL, scroll your mouse wheel upward to zoom in on the document; scroll downward to zoom out of the document.	CTRL+mouse wheel

Note: Keyboard shortcuts and the arrow keys may not work when the viewer displays PDFs or OLE documents (such as Microsoft Word documents). These documents can cause the shortcuts to be interpreted by the documents’ native applications rather than the Release of Information module.

Excluding Specific Pages from a Document

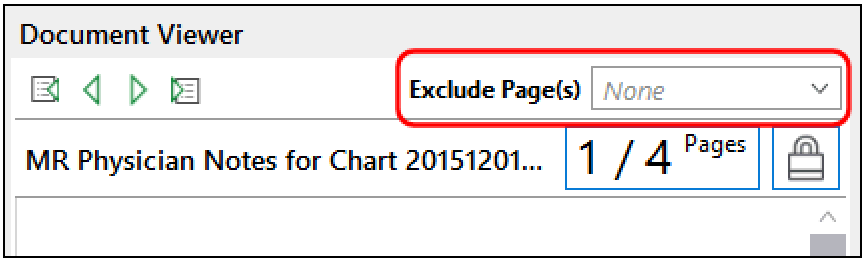
If a document contains pages that should be excluded from the request, you can exclude these pages using the Document Viewer. The pages are excluded only from the document released for the request. The document stored in OnBase is not modified.

Note: If you replace an attachment with a more recent revision of the document, any page exclusions for that document are cleared.

To exclude pages from a document:

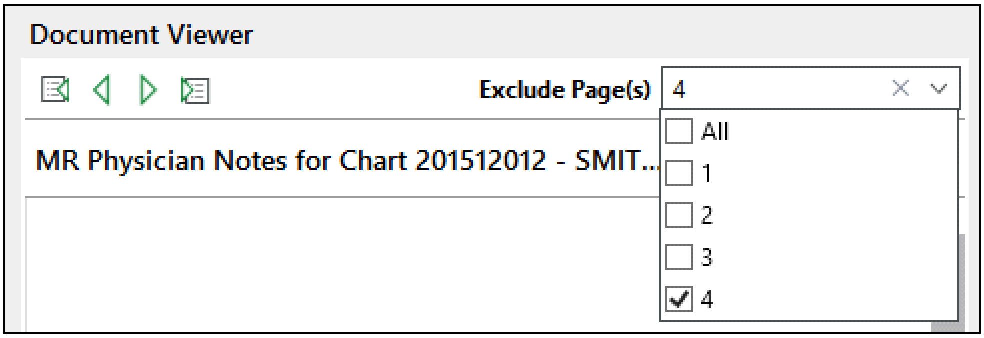
1. Click the **Attachments** button in the ribbon.

2. In the left pane, navigate to the document. The document is displayed in the Document Viewer.
3. Click the **Exclude Page(s)** drop-down in the upper-right corner of the viewer.



4. Select the page numbers to exclude from the request.

   You can use the **All** option to select all pages in the document, and then deselect the pages you want to include. You cannot exclude all pages from a document. To remove the entire document, see Removing Attached Documents.



   To restore pages that were previously excluded, clear the selected page from the drop-down. To restore all pages in a document, click the X displayed on the right side of the drop-down.

5. Save the request.

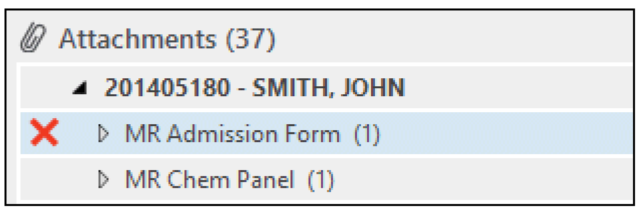
Removing Attached Documents

You can remove attached documents from either the Attachments or Release Order view.

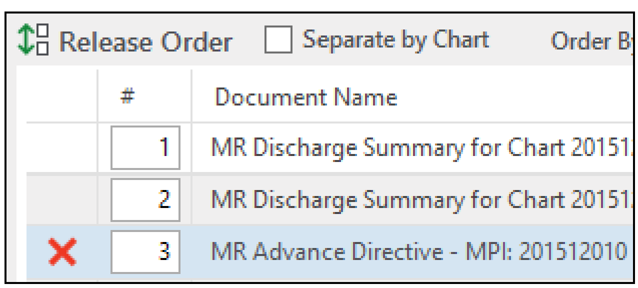
Tip: You can also use the **Add Charts and Documents** button to add or remove entire charts or Document Types from a request.

To remove attached items:

1. Do one of the following:
   - Within the **Attachments** view: To remove a patient, chart, Document Type, or document, rest your pointer over the item, and then click the X displayed to the left of the item. All documents grouped under the item are removed from the request.



   - Within the **Release Order** view: To remove a document, rest your pointer over the document, and then click the X displayed to the left of the document:



2. Click **Save** to update the request.

Reordering Attached Documents

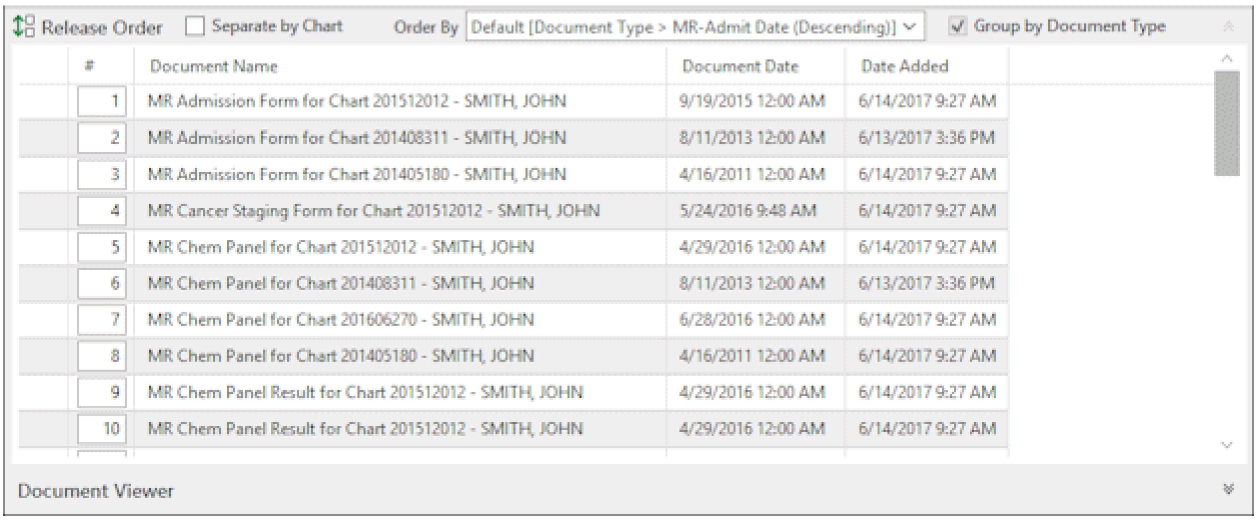
Once you have added documents to a request, you can order them according to the requester's preference.

The initial order of documents is dictated by the Request Type. However, if you have changed the release order before selecting a Request Type, the release order you have configured is used instead of the Request Type release order.

To reorder documents:

1. Click the **Release Order** button from an open request.

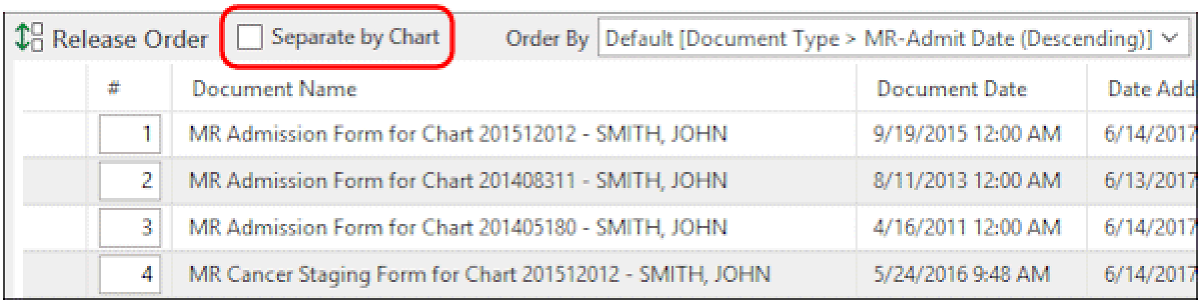
The **Release Order** list is displayed.



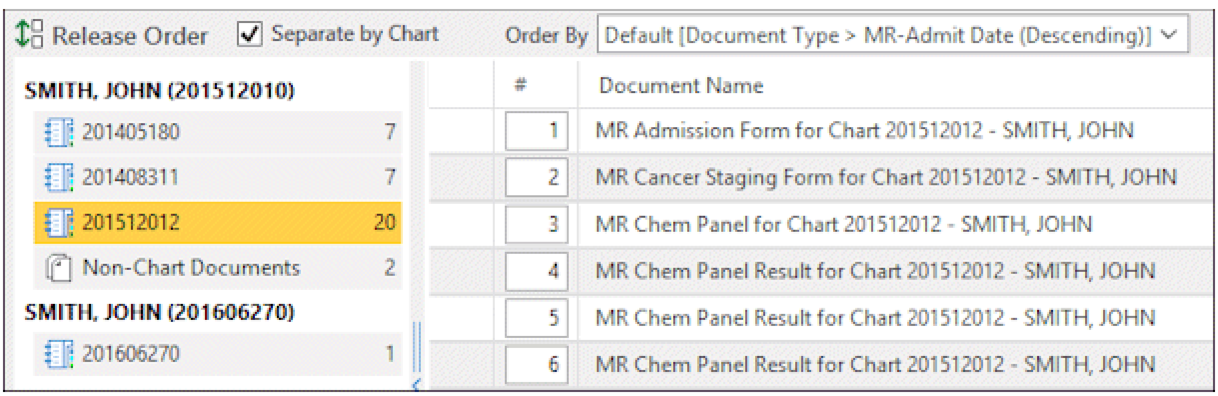
#	Document Name	Document Date	Date Added
1	MR Admission Form for Chart 201512012 - SMITH, JOHN	9/19/2015 12:00 AM	6/14/2017 9:27 AM
2	MR Admission Form for Chart 201408311 - SMITH, JOHN	8/11/2013 12:00 AM	6/13/2017 3:36 PM
3	MR Admission Form for Chart 201405180 - SMITH, JOHN	4/16/2011 12:00 AM	6/14/2017 9:27 AM
4	MR Cancer Staging Form for Chart 201512012 - SMITH, JOHN	5/24/2016 9:48 AM	6/14/2017 9:27 AM
5	MR Chem Panel for Chart 201512012 - SMITH, JOHN	4/29/2016 12:00 AM	6/14/2017 9:27 AM
6	MR Chem Panel for Chart 201408311 - SMITH, JOHN	8/11/2013 12:00 AM	6/13/2017 3:36 PM
7	MR Chem Panel for Chart 201606270 - SMITH, JOHN	6/28/2016 12:00 AM	6/14/2017 9:27 AM
8	MR Chem Panel for Chart 201405180 - SMITH, JOHN	4/16/2011 12:00 AM	6/14/2017 9:27 AM
9	MR Chem Panel Result for Chart 201512012 - SMITH, JOHN	4/29/2016 12:00 AM	6/14/2017 9:27 AM
10	MR Chem Panel Result for Chart 201512012 - SMITH, JOHN	4/29/2016 12:00 AM	6/14/2017 9:27 AM

Tip: When reordering documents in a request, save the request often to ensure your intended changes are applied.

2. If the request contains multiple charts, select **Separate by Chart** to ensure documents belonging to the same chart are grouped together. If a request contains multiple patients, enabling this option ensures clinical documents for the same patient are grouped together.



The left pane lists the packets that will be generated for this request. Select a packet to review and sort the documents within it.



3. Change the document order either manually or by selecting an order sequence. See the following topics:
   - Ordering Documents by Selecting a Sequence
   - Ordering Documents Manually
   - Reverting to the Default Order
4. Click the **Save** button from the ribbon to save the new order.

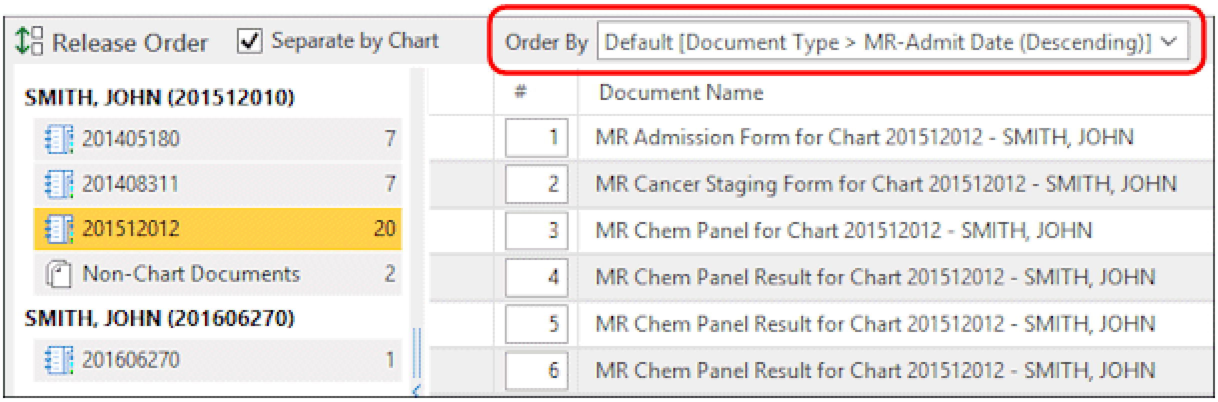
Ordering Documents by Selecting a Sequence

You can reorder documents in the **Release Order** list by selecting a built-in sequence. These sequences allow you to order documents in the list by either Document Date or the date they were added to the request.

Note: Documents cannot be ordered by Keyword Type unless the Request Type is configured to do so. For more information, contact your system administrator.

To reorder documents using an order sequence:

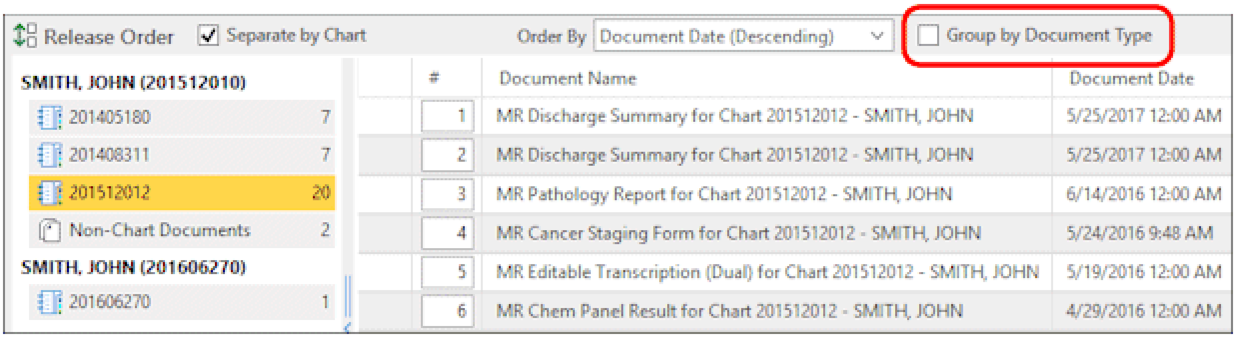
1. Click the **Order By** drop-down list.



2. Select one of the following:

Order By	Description
Date Added (Ascending)	Orders the list by the date the document was added to the request, starting with the earliest date.
Date Added (Descending)	Orders the list by the date the document was added to the request, starting with the most recent date.
Document Date (Ascending)	Orders the list by the Document Date, starting with the earliest date.
Document Date (Descending)	Orders the list by the Document Date, staring with the most recent date.

3. If documents should be grouped by Document Type, select the **Group by Document Type** option.
   When this option is selected, documents are grouped by Document Type and then ordered according to the selected sequence. This option is available only if a sequence described in the previous step is selected.



Note: If documents should be grouped by Document Type within a specified date, contact your system administrator. Document Type grouping in this manner is possible only when the default sort order for the Request Type has been configured accordingly. Alternatively, you can order the document manually.

4. Click **Save**.

Ordering Documents Manually

You can reorder documents manually in the **Release Order** list at any point during the reordering process. Remember to click **Save** when finished.

To reorder documents manually, select a document and do one of the following:

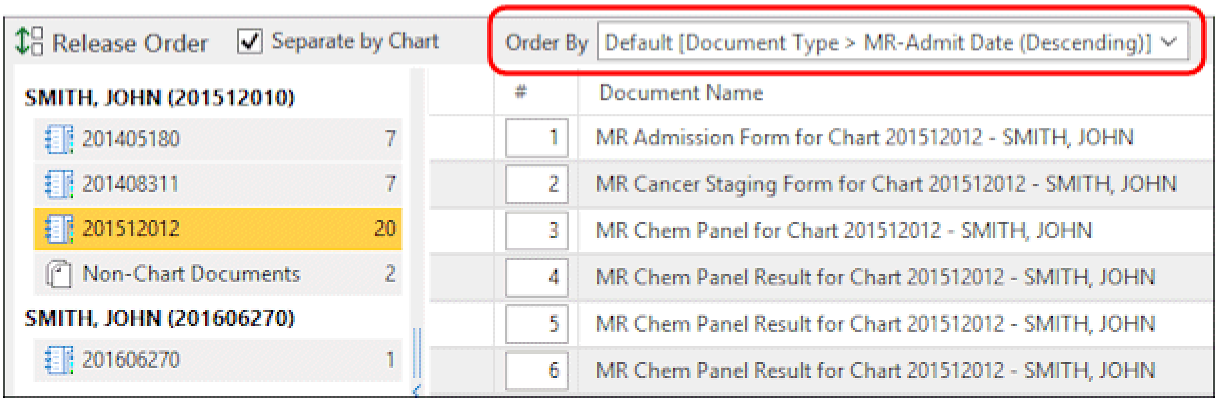
- Click and drag the document to the desired position. If you change your mind while dragging, you can stop the reorder operation by doing one of the following:
  - Right-click the mouse.
  - Drag the item outside the window.
- Click the **#** box next to the document, and then edit the sequence number. Press **Enter** to apply the new sequence.
- Use the **Move** options, which you can access by right-clicking the document list:

Option	Description
Move to Top	Moves the selected document to the top of the list.
Move Up	Moves the selected document up one position.
Move Down	Moves the selected document down one position.
Move to Bottom	Moves the selected document to the bottom of the list.

Reverting to the Default Order

At any point during the reordering process, you can reapply the default order for the Request Type.

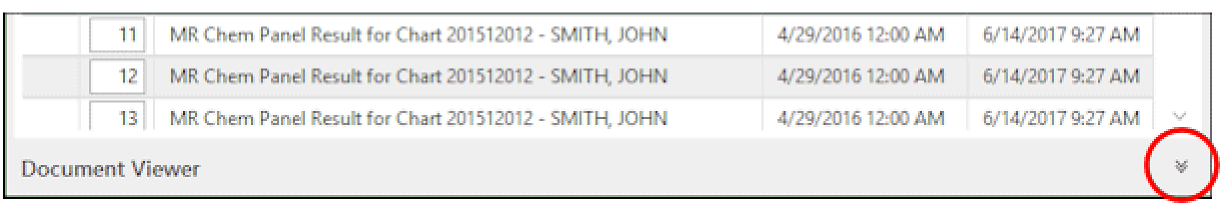
To reapply the default order, select the Default option from the **Order By** drop-down list.



Viewing Documents Within the Release Order View

You can quickly view documents attached to a request from the **Release Order** list.

To view a selected document, expand the Document Viewer at the bottom of the list.



If necessary, you can use the Document Viewer to exclude pages from specific documents. See Excluding Specific Pages from a Document.

Note: For general information about working with documents, see the Medical Records Unity Client documentation.

Generating a Document Using a Template

Depending on your system configuration, you may be able to generate and print documents from an open request using pre-configured templates. Templates have the ability to pull information from a request and compose a unique document based on that information. Once a document is composed, it can be printed.

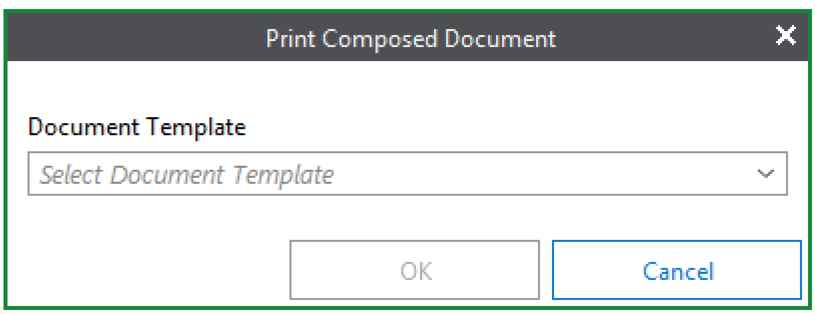
Note: Documents generated using this method are temporary. They are not attached to the request in any way, and they are purged from the system after printing is either initiated or canceled.

To compose a document using a template:

1. From an open request, click the **Print Composed Document** button from the **Release of Information** tab.

   The **Print Composed Document** dialog box is displayed.

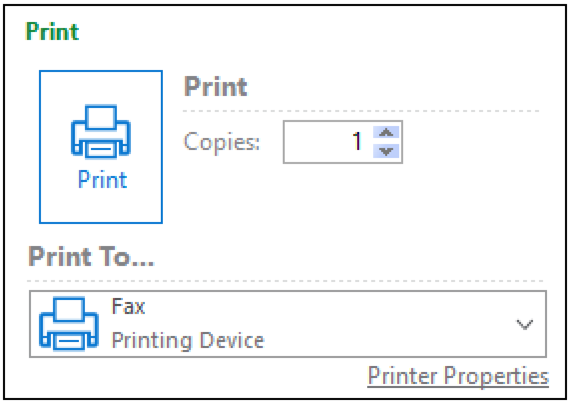
2. Select the template you want to use to compose the document.
3. Click **OK**.

   You may experience different behaviors, depending on system settings.

   - If the generated document is displayed, review and accept the document before moving on.
   - If you are prompted to upload the document, upload the document to the system before moving on. The document is purged after the process is either canceled or completed.

   For more information on these contexts, see Working with System-Generated Documents on page 402.

4. The **Print** dialog box is displayed.



5. Set print options appropriately and click **Print**.
   The document is purged from the system once printing is initiated or canceled.

Note: For more information on print options, see Configuring Print Settings on page 397.

Canceling or Rejecting a Request

Depending on your privileges, once a request has been saved, the **Cancel / Reject** button may be available. While similar in functionality, whether you cancel or reject a request yields a different outcome.

- **Cancel**: Cancel a request if it was created in error or if the request is no longer necessary. For example, perhaps you created a new request and then learned another user has created the same request. In this case, you would cancel one of the requests. Once a request is canceled, it becomes read-only. Only the **Comments** field can be edited. A canceled request cannot be restored.
- **Reject**: Reject a request if the request cannot be completed. For example, the patient's file is incomplete, or the patient has not consented to his or her information being released.

  When you reject a request, you must select a pre-configured reason for rejection. Depending on your system's configuration, a rejection letter may be generated for the requester explaining why the request was rejected. At this point, it is incumbent on the requester to reopen the request if necessary. Once a request is rejected, it becomes read-only. Only the **Comments** field can be edited. If the request is restored, it can be modified again.

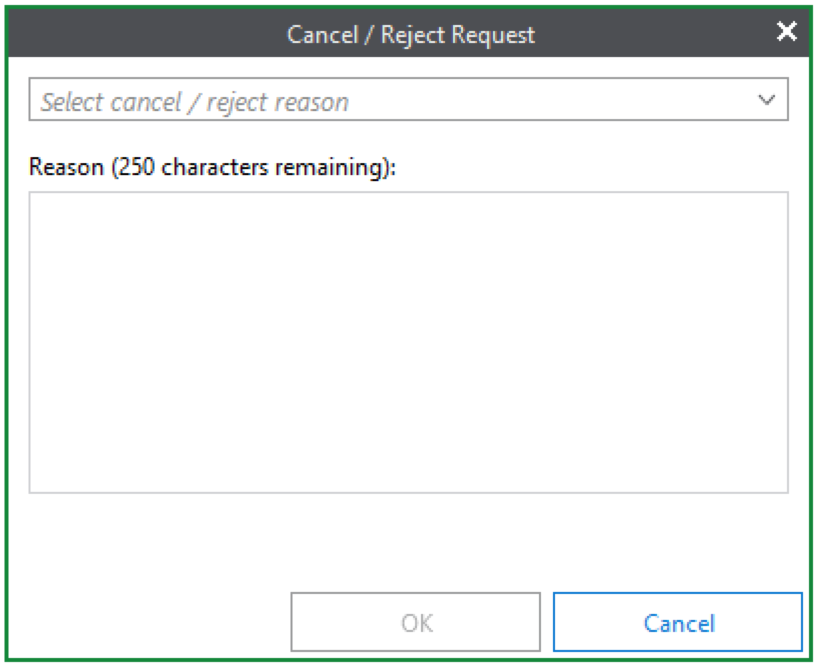
Note: Canceled and rejected requests are not displayed in the **Active Requests** list. To find canceled or rejected requests, retrieve them using request search.

To cancel or reject a request:

1. From an open request, click the **Cancel / Reject** button from the **Release of Information** tab.

   The **Cancel / Reject Request** dialog box is displayed.

2. Select a reason for canceling or rejecting a request from the **Select cancel / reject reason** drop-down list.

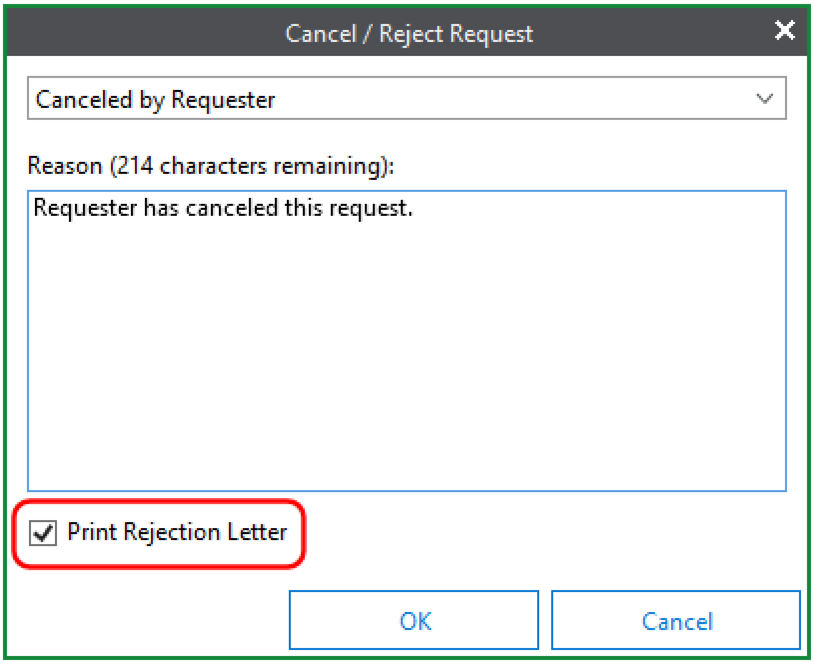
Note: Once a request is canceled, it cannot be restored or modified.

3. Enter a reason for canceling or rejecting the request in the **Reason** field. Reasons can be up to 250 characters.

   The **Reason** field must contain text before the **OK** button is enabled. Default text may be provided, depending on the selected cancel / reject reason.

4. Depending on your system settings, if you selected a rejection reason, the **Print Rejection Letter** option may be available. Select the **Print Rejection Letter** option to print a rejection letter for the request.

Note: If the **Print Rejection Letter** option is selected, you must print the letter for the request to be rejected. Depending on your system settings, this option may be selected and unable to be deselected.



5. Click **OK**.
    - If you selected to cancel the request, the request is canceled and the process is complete.
    - If you selected to reject the request and the option to print a rejection letter was not displayed, the request is rejected and the process is complete.

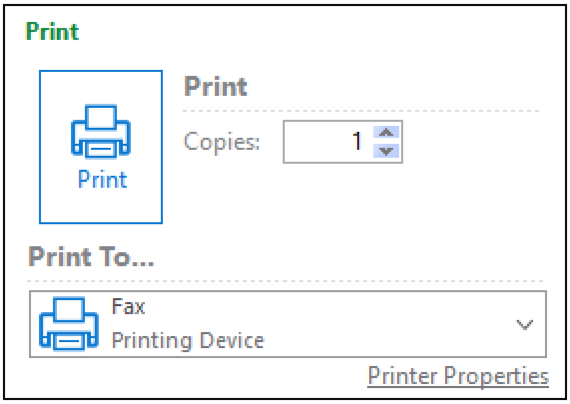
Note: Once a request is rejected, it is no longer assigned to any user.

- If you selected to reject the request and had the option to print a rejection letter, a rejection letter is generated and uploaded to the system.

Note: You may experience different behaviors, depending on your system settings. If the generated rejection letter is displayed, you must review and choose to accept the rejection letter before moving on. If you are prompted to upload the rejection letter, you must manually upload the rejection letter to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.

6. If you did not select to print the rejection letter, the process is complete.

   If you selected to print the rejection letter, the **Print Rejection Letter** dialog box is displayed.



7. Set print options appropriately and click **Print**.

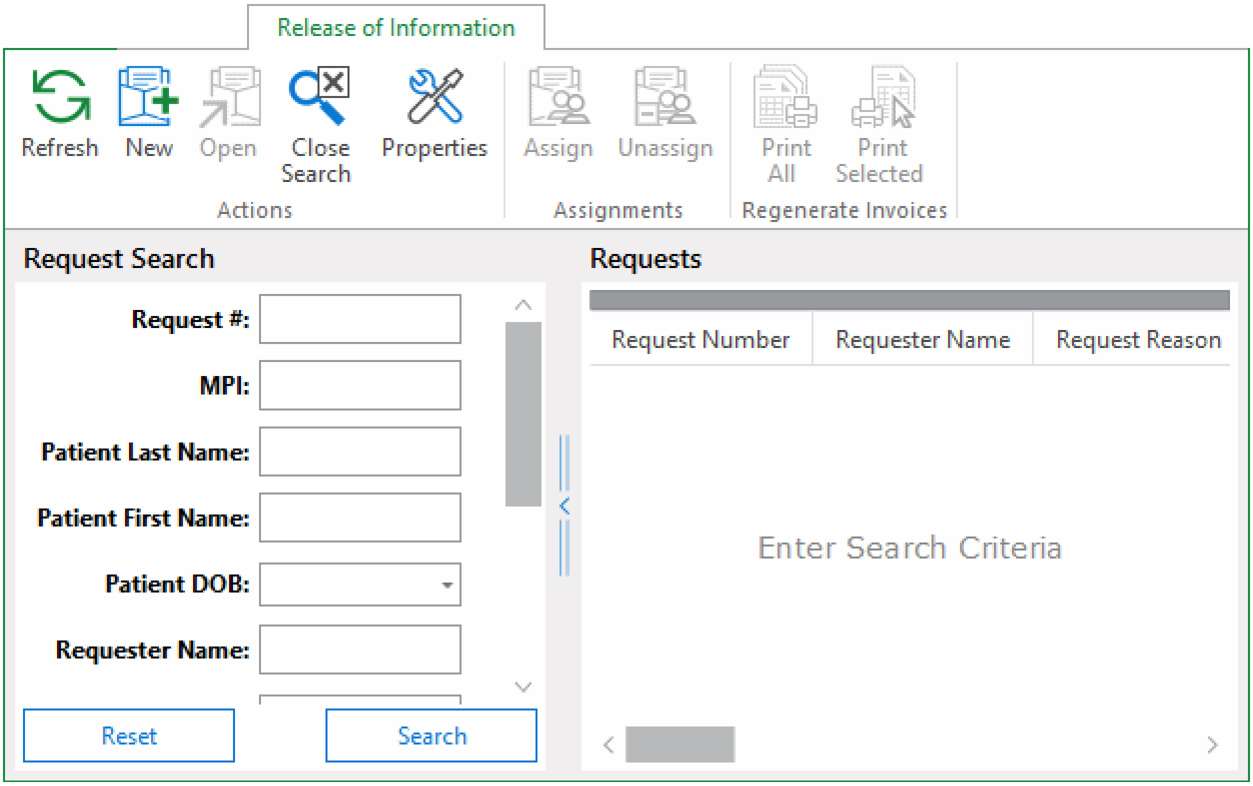
Note: For more information on print options, see Configuring Print Settings on page 397.

Restoring a Rejected Request

Once a request is rejected, it becomes read-only and is no longer displayed in the **Active Requests** list. are read-only. Only the **Comments** field can be edited.If you need to reopen the request, you can restore it. The status of the request changes from **Rejected** to **Initiated**, and the request is once again displayed in the **Active Requests** list.

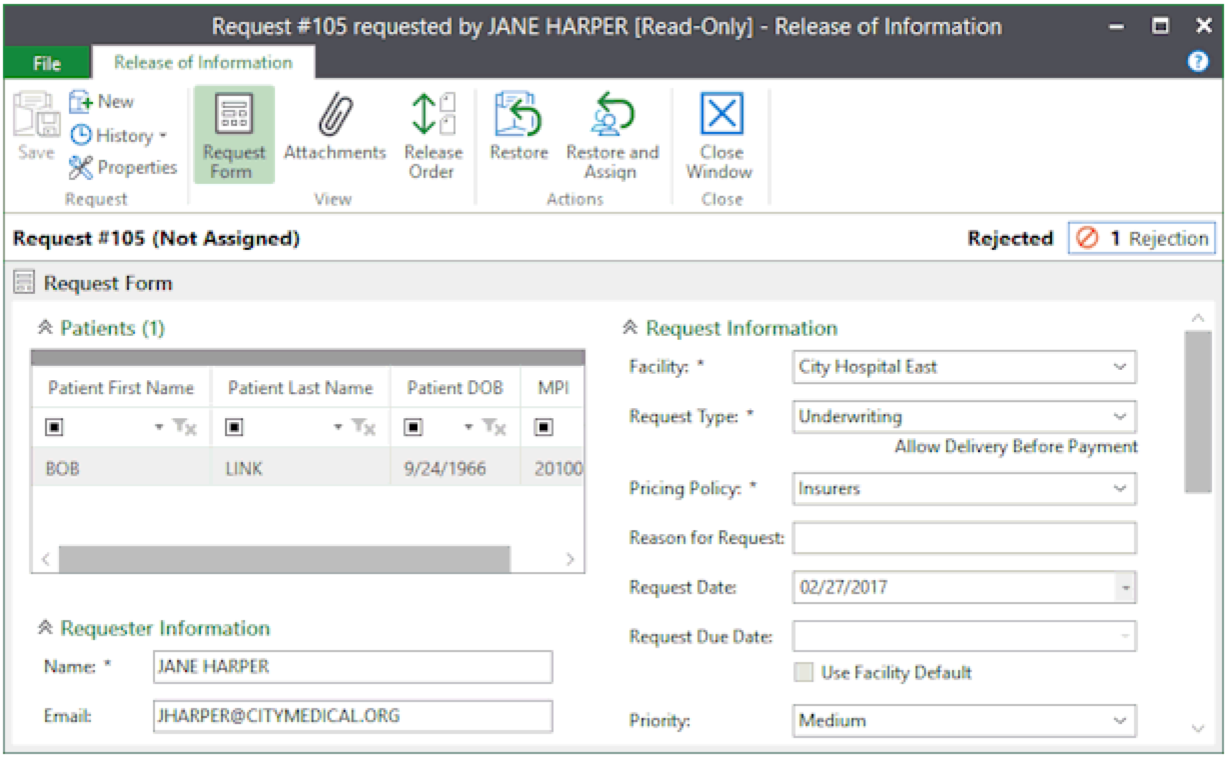
To restore a rejected request:

1. From the **Active Requests** list, click the **Search** button on the **Release of Information** tab. The **Request Search** screen is displayed.



2. Enter the appropriate search criteria for the request and click **Search**.
   For more information on searching for requests, see Searching for a Request on page 306.

3. From the search results, open the rejected request you'd like to restore. The request is displayed.

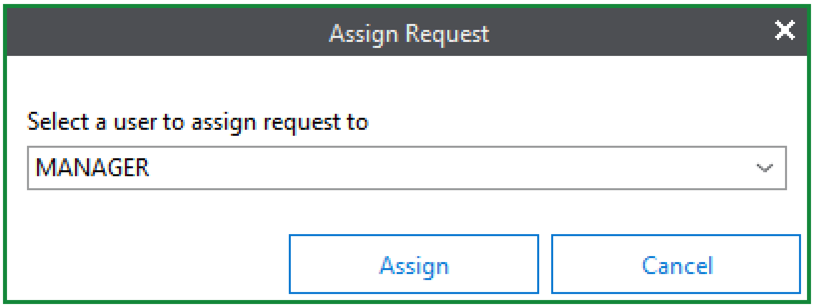


4. Do one of the following:
   - Click the **Restore** button from the **Release of Information** tab to allow work to resume on the request. The request is restored and not assigned to anyone.
   - Click the **Restore and Assign** button to assign the request to a user and allow work on the request.

Note: Depending on your privileges, the **Restore and Assign** button may not be available. For more information, see your system administrator.

5. If you clicked **Restore and Assign**, the **Assign Request** dialog box is displayed. Select a user from the drop-down list and click **Assign**.

Note: Depending on your privileges, you may only be able to assign requests to yourself. In this can, when you click the **Restore and Assign** button, the request is automatically assigned to you. For more information, see your system administrator.



The request is restored and assigned to the selected user.

6. Once you have restored a request, it is displayed in an active, editable state so that you can begin working on it without having to reopen it from the **Active Requests** list.

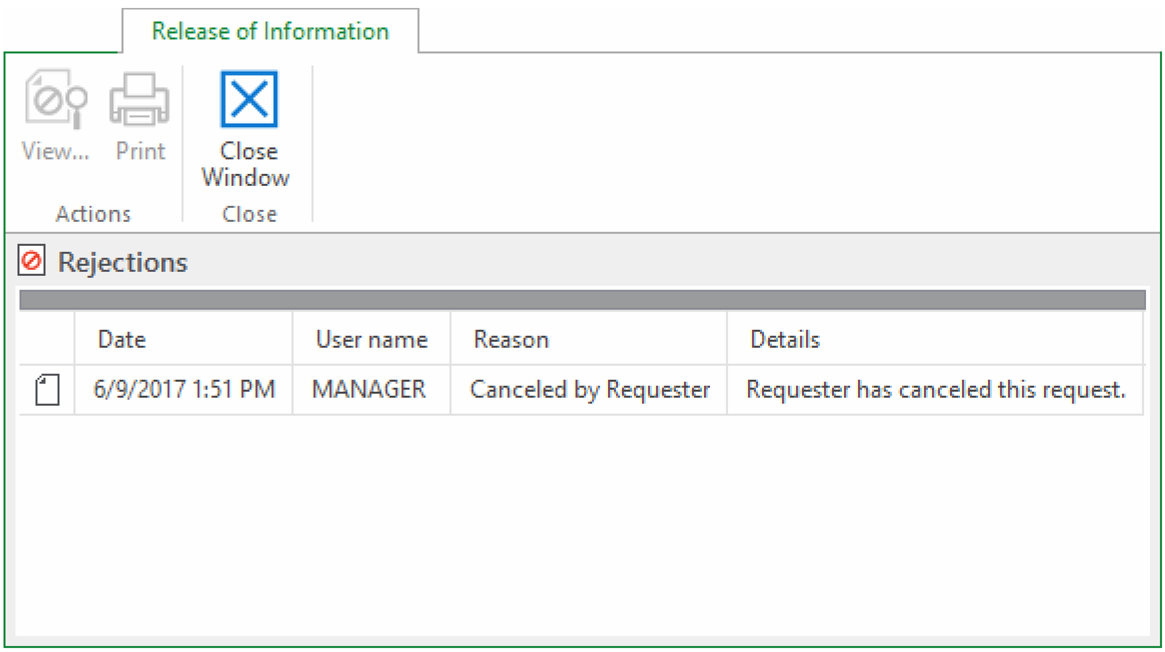
Viewing Past Rejections

ROI retains a history of rejections associated with a request. Using this history, you can see when a rejection took place, who rejected the request, the reason the request was rejected, and details about the rejection. Depending on your rights, you can also print a copy of the rejection letter generated at the time the request was rejected (if applicable).

To view past rejections of a request:

1. Retrieve and open the appropriate request.
2. Click the **Rejection** button, located on the Request Header.

The **Rejections** dialog box is displayed, listing any rejections associated with the request. Each line displays the date the request was rejected, the user name of the person who rejected the request, the selected Rejection Reason, and details of the rejection.



Printing the Rejection Letter for a Past Rejection

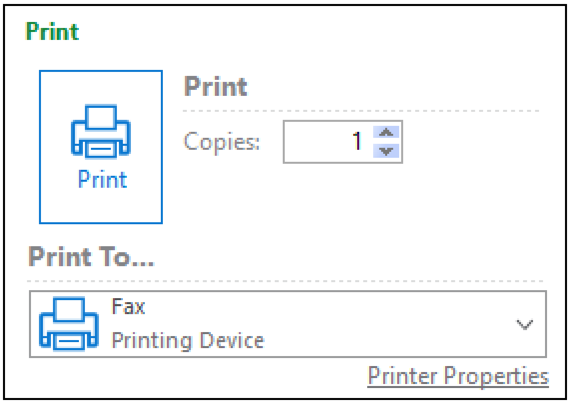
If a document icon is displayed to the left of the rejection date, you can view and print the rejection letter associated with the rejection. If the rejection does not display a document icon in the leftmost column, then there is no rejection letter associated with the rejection.

To print the rejection letter associated with a rejection:

1. Select the rejection from the **Rejections** list.
2. Do one of the following:
   - Click the **Print** button from the **Release of Information** tab.
   - Click the **View** button from the **Release of Information** tab to display the rejection letter in the Document Viewer. From the **Print Rejection Letter** dialog box, click the **Print** button from the **Release of Information** tab.

Note: Any changes you make to the rejection letter in the Document Viewer are not printed. If you do make changes to the rejection letter, you may be prompted to save your changes. If you select **Yes**, you are able to save the changes as a new document.

Depending on your selection, either the **Print Rejection Letter** dialog box or the **Print** pane is displayed.



3. Set print options appropriately and click **Print**.

Note: For more information on print settings, see Configuring Print Settings on page 397.

Finalizing a Request

After you have completed work on a request, it is ready to be finalized. Depending on your system's configuration, finalizing a request means one of two things:

- Generating a PDF packet of all attached documents.
- Sending the request forward for approval (if required).

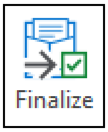
When a PDF packet is generated for a request, all currently attached documents are exported into a single PDF file. The documents within the file are displayed according to the release order.

Some facilities may require that you submit a request for approval before a request packet can be generated. When a request is submitted for approval, it is sent forward to be reviewed by another user, such as a manager. Once that user approves the request, the request PDF packet is generated.

Only finalize a request after you have completed the request form, attached all appropriate charts and/or documents, and determined the appropriate release order of the attachments. At minimum, the following request form fields must be completed before finalizing a request: **Patient Name**, **Requester Name**, **Facility**, **Pricing Policy**, and **Request Type**. Once a request has been submitted, information and attachments on the request cannot be modified.

Note: The ROI Packet Generation service must be running for request PDF packets to be generated successfully. For more information, contact your system administrator.

To finalize a request, retrieve and open the appropriate request. Click the **Finalize** button from the **Release of Information** tab.



Note: If one or more documents previously included in the request have been deleted from the system but have not been removed the request, you are notified the request cannot be finalized until you have removed the documents from the request. For more information on removing deleted documents from a request, see Removing Deleted Documents from a Request on page 318.

Note: If you have selected to attach Document Types containing external system documents but have not yet initiated their retrieval, you are notified the Document Types have not been retrieved. At this point, you can either move forward and finalize the request by clicking **Yes**, or you can return to the request and retrieve the external system documents by clicking **No**. For more information retrieving external documents, see ROI and Report Capture for Meditech on page 417.

The request is closed. Any unsaved changes on the request are automatically saved.

Depending on whether the request requires approval, the status of the request changes to one of the following statuses:

- **Pending Approval** - A request that was submitted for approval and must be approved before the PDF packet can be generated.
- **Pending Packet** - A request that is completed and currently generating the PDF packet of attached documents.

Note: If there are no documents attached to the request, the **Pending Packet** status is bypassed, because there is no need to create a request packet. Depending on the Request Type, the status of a request is changed to **Pending Billing** or **Pending Delivery**.

You can periodically check to see if the request packet is complete by refreshing the **Active Requests** list. The following icons displayed in the **Active Requests** list next to the request status and in the request header provide information on the progress of the packet being generated:

Icon	Description
Awaiting Packet Creation	The packet is currently being prepared and compiled.
Creating Packet	The packet is currently being created.
Error Creating Packet	There was an error during packet creation. For more information, contact your system administrator.

After a packet is generated for the request, the status changes to either **Pending Billing** or **Pending Delivery**, depending on the Request Type.

Tip: To modify a request submitted in error, open the request and click the **Revert to Initiated** button from the **Release of Information** tab. For more information, see Reverting a Request to the Initiated Status on page 394.

Approving Requests

Once a request has been finalized and submitted for approval, some action needs to be taken. A user tasked with approving requests can either approve the request or return the request to the person who finalized it. When returning a request to the submitter, you are given the opportunity to explain the reason you could not approve the request in its current state.

Approving a Request

To approve a request:

1. Retrieve and open the appropriate request. It should have a status of **Pending Approval**.
2. Ensure the request is completed according to any required guidelines.

   If the request requires further action from the person submitting the request, skip the following steps and see the section on returning a request to the submitter below.
3. After you have reviewed the request, click the **Approve** button from the **Release of Information** tab.

4. You are prompted to confirm approval. Click **Yes**.

   The request status changes to **Pending Packet**. After a packet is generated for the request, the status changes to **Pending Billing** or **Pending Delivery**, depending on the Request Type.

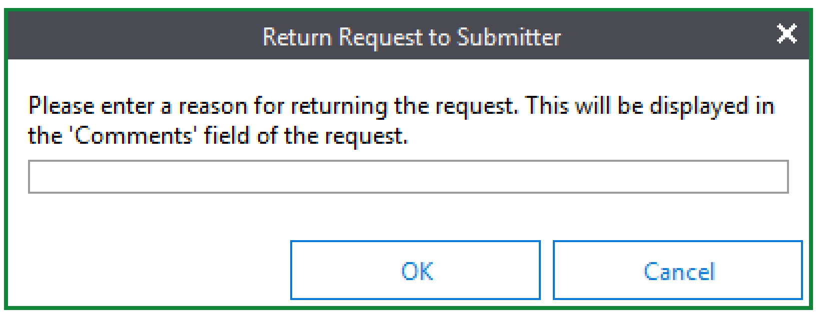
Returning a Request to the Submitter

To return a request to the submitter:

1. Retrieve and open the appropriate request. It should have a status of **Pending Approval**.
2. Click the **Return to Submitter** button from the **Release of Information** tab.

   The **Return Request to Submitter** dialog box is displayed.

3. Enter a reason for returning the request.

   Entering a reason is not required, but it may be helpful to the specialist working on the request. Comments entered in this field are displayed at the top of the **Comments** field on the request form. You should enter comments in this field in the same format you would enter them in the **Comments** field of the request form.
4. Click **OK**.

   The request is routed back to the specialist who originally submitted the request with a status of **Not Approved**, noted by an exclamation point icon  in the **Active Requests** list.

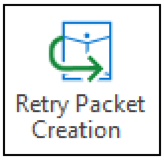
Retrying Packet Creation

If packet generation has failed for a request, you can add the request back to the packet generation queue using the **Retry Packet Creation** button. This button re-queues the request for packet generation without requiring the request to go back to the **Initiated** status.

In some cases, a request may need to go back to **Initiated** in order for the failure reason to be addressed. The **Retry Packet Creation** button is provided for error cases that do not require the request to go back to **Initiated**.

To re-queue a request for packet generation:

1. Open the request.
2. Click the **Retry Packet Creation** button. The request is re-queued for packet generation.



Billing and Receiving Payment

After you have successfully finalized the request, including generating a PDF packet (if necessary), the requester can be billed for the request, if required. After the requester is billed and the payment is received, the request should be delivered and completed.

The following sections describe how to bill a requester and receive payment for a request.

Note: Currency values in ROI are displayed according to workstation locale.

Billing a Requester

After work has been completed on a request, you are able to bill the requester for the items attached to the request, depending on your rights. To be able to bill a requester:

- The request must be finalized.
- The request must be approved (if required).
- An external document retrieval process cannot be in progress.

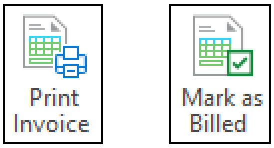
Note: External document retrieval is only available when your system is licensed for Report Capture for Meditech and configured to retrieve external documents. For more information on external document retrieval, see ROI and Report Capture for Meditech on page 417.

To bill a requester for a request:

1. Retrieve and open the appropriate request.
2. From the request, depending on your system settings, a billable request displays one of the following buttons from the **Release of Information** tab.

   Print Invoice is displayed when an invoice has been configured for the request facility.

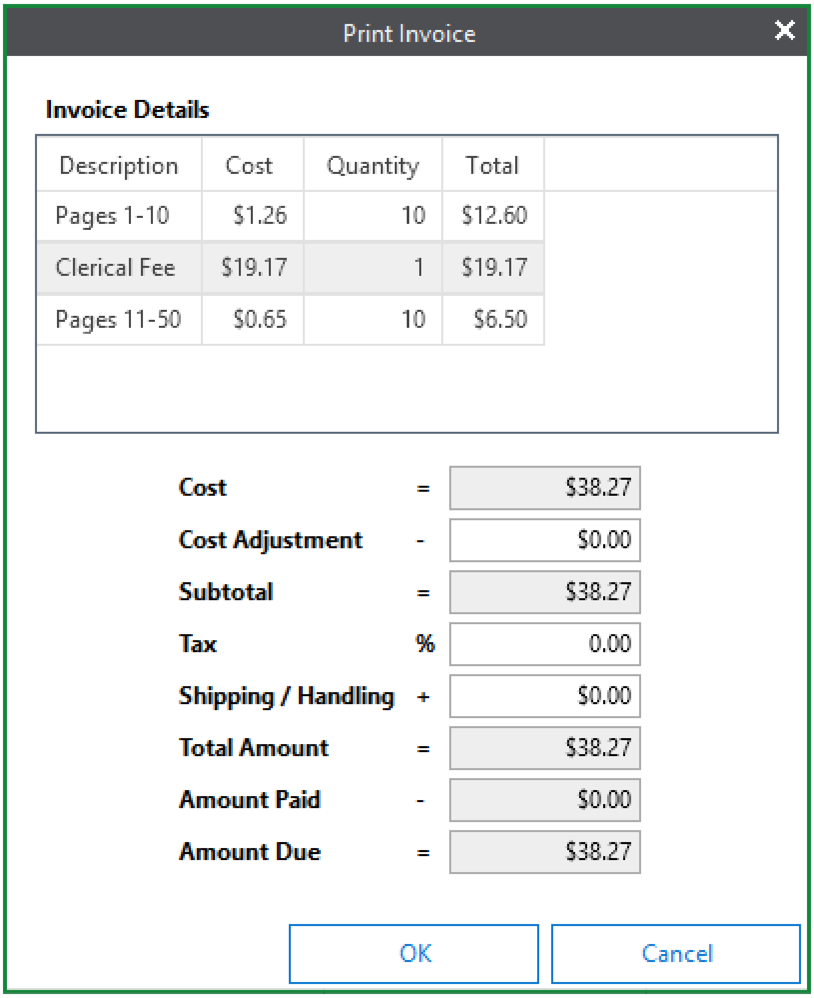
   Mark as Billed is displayed when an invoice has not been configured for the request facility.



3. Click the **Mark as Billed** or **Print Invoice** button.

   Depending on your selection, either the **Mark as Billed** or **Print Invoice** dialog box is displayed.

Note: The **Mark as Billed** and **Print Invoice** dialog boxes contain the same information.



Any applicable attachment costs are calculated per your system configuration. The **Invoice Details** lists each applicable pricing policy rule and external item for the request, displaying its description, single-item cost, the quantity attached to the request, and the total cost (the cost multiplied by the quantity).

The following fields of the dialog box are non-editable:

Field	Description
Cost	Displays the total cost of the items displayed in the **Invoice Details**.
Subtotal	Displays the total cost of the items after adjustment using the following equation: **Cost** - **Cost Adjustment** = **Subtotal**.

Field	Description
Total Amount	Displays the initial total amount due for the request using the following equation: **Subtotal** + (**Subtotal** x **Tax**) + **Shipping / Handling** = **Total Amount**.
Amount Paid	Displays the total amount of any payments the requester has already made.
Amount Due	Displays the current amount due from the requester after payments using the following equation: **Total Amount** - **Amount Paid** = **Amount Due**.

4. Edit the following fields to determine the amounts displayed in the **Subtotal** and **Total Amount** fields.

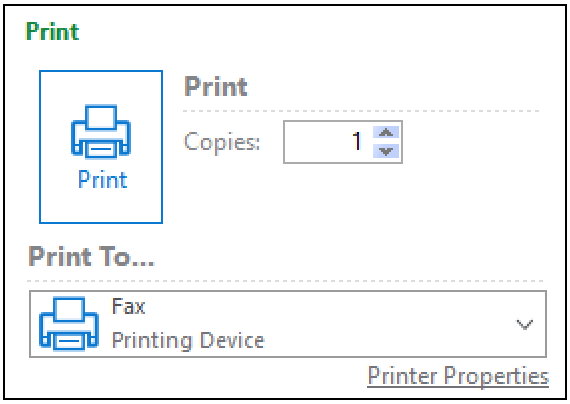
Field	Description
Cost Adjustment	Allows you to manually adjust the **Cost** of the request by entering a negative amount. The **Subtotal** field is adjusted appropriately (**Cost** - **Cost Adjustment** = **Subtotal**).
Tax	The tax rate that should be applied to the **Subtotal** of the request. For example, if the tax rate you enter is **6.25** percent, the **Subtotal** multiplied by 0.0625 is added to the **Total Amount** of the request.
Shipping / Handling	The amount for shipping and handling charges for delivering the request.

5. Click **OK** to save the billing information.

6. If you clicked the **Mark as Billed** button in step 3, the process is complete, and the status of the request is changed to **Awaiting Payment**.

   If you clicked the **Print Invoice** button in step 3, the **Print Invoice** dialog box is displayed.

Note: You may experience different behaviors, depending on your system settings. If the generated invoice is displayed, you must choose to accept the invoice before moving on. If you are prompted to upload the invoice, you must manually upload the invoice to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.



7. Set print options appropriately and click **Print**.

   The status of the request is changed to **Awaiting Payment**.

Note: For more information on print options, see Configuring Print Settings on page 397.

Receiving Payment from a Requester

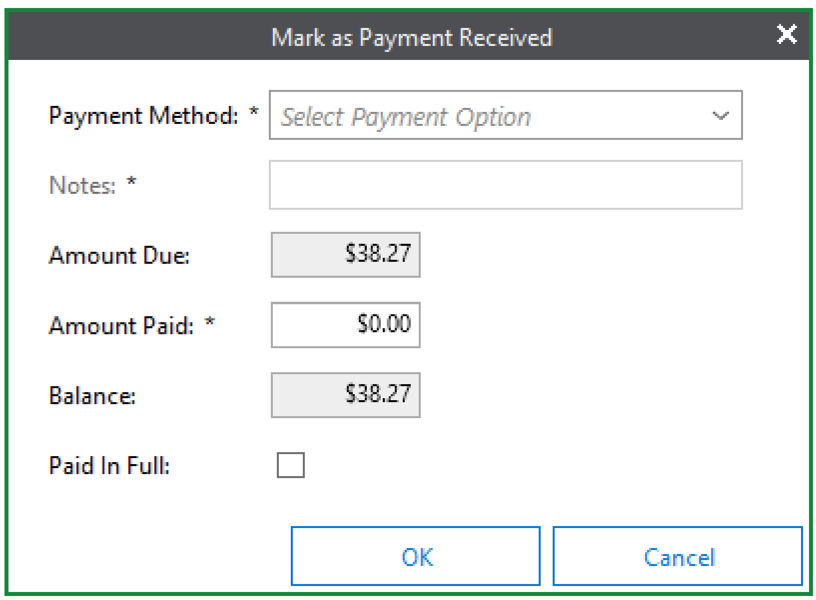
After a requester has been billed for a request, the option to receive payment from the requester becomes available. Using the **Mark as Payment Received** option, you can record payment from a requester and apply it to the remaining balance of the request.

To receive payment from a requester:

1. Retrieve and open the appropriate request.
2. Click the **Mark as Payment Received** button from the **Release of Information** tab.

Note: A request must have a status of **Awaiting Payment** for the **Mark as Payment Received** option to be available. For more information on transferring a request to the **Awaiting Payment** status, see Billing a Requester on page 387.

The **Mark as Payment Received** dialog box is displayed.



3. Select a method of payment from the **Payment Method** drop-down list. The following options are available:
   - Cash
   - Check
   - Credit Card
   - Other

   Selecting **Cash**, **Check**, or **Other** activates the **Notes** field. Selecting **Credit Card** activates the **Credit Card Type** drop-down list.

4. Do one of the following, depending on your selection:
   - Enter up to 20 characters regarding the payment in the **Notes** field (e.g., the check number of the check used to make payment).
   - Select a credit card type in the **Credit Card Type** drop-down list. The following default options are available:
     - American Express
     - Discover
     - MasterCard
     - Visa

     To edit your selection, place the cursor inside the **Credit Card Type** drop-down list and click the mouse. Enter any other relevant information (e.g., the last four digits of the credit card used to make payment).

Note: Information entered in the **Notes** field and **Credit Card Type** drop-down list is not encrypted. Neither of these fields should be used to record sensitive information (e.g., credit card or checking account numbers in their entirety).

5. Enter the payment amount from the requester in the **Amount Paid** field.

   This amount is subtracted from the amount displayed in the **Amount Due** field. Any remaining balance is displayed in the **Balance** field.

   If you enter a value greater than the **Amount Due**, a red parenthetical amount is displayed for the **Balance**, indicating an amount due to the requester.

Note: The **Amount Due** and **Balance** fields are automatically calculated and cannot be manually adjusted. The **Amount Due** field takes into account any previous payments received from the requester.

6. Select **Paid in Full** if the request has been paid in full.

   If there is an outstanding balance, selecting this option bypasses the need for a payment to be applied to the balance.

Note: This option is automatically selected and disabled when the balance is **$0.00** or below.

7. Click **OK**.

   Depending on required payment and whether you have printed the request to this point, the resulting status of the request is one of the following:
   - **Awaiting Payment** - Indicates further payment is required for the request.
   - **Pending Delivery** - Indicates no further payment is required and the request has not been printed to this point.
   - **Completed** - Indicates no further payment is required and that the request was either printed or saved to file at least once.

Reverting a Request to the Initiated Status

Before a request is completed, it can be reverted back to the **Initiated** status. **Initiated** is the initial status of a request upon its creation. Reverting a request to its initial status does not remove existing information, attachments, or payments on the request. Rather, it changes the status of the request and removes any recorded invoice dates, allowing you to repeat certain actions.

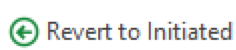
Depending on your rights, the ability to revert a request may be available after a request is finalized.

Note: You cannot revert a request that has a status of **Completed**. Whether a request is marked as **Completed** upon executing certain actions depends on system configuration and/or the completion of other tasks.

After a request has been reverted to its initial status and you bill the requester, you must reenter the necessary cost adjustment, tax percentage, and shipping and handling fee. Although previous payments from the requester are recorded, a new amount due from the requester may be displayed when you go to receive payment from the requester. For example, the balance is **$0.00** before you revert the request to its initial status. Upon reverting the request and applying a higher tax percentage, the difference as a result of the tax percentage increase is reflected in the **Amount Due** field of the **Mark as Payment Received** dialog box.

To revert a request to its initial status:

1. Retrieve and open the appropriate request.
2. Click the **Revert to Initiated** button from the **Release of Information** tab.

   When setting the request to **Initiated**, previous actions that determined the current status will need to be completed again. This does not affect the information on the request or its attachments.
3. Click **Yes**.

   The request is reverted to the **Initiated** status.

Completing and Exporting a Request

There are multiple ways to complete a request in ROI. Once a request is completed, it can be exported. A request is completed by printing the request or saving the request as a PDF file for the first time. A request is also completed by marking the request as complete.

See the following sections for more information:

- Previewing the PDF Packet on page 395
- Printing a Request on page 396
- Saving a Request to File on page 398
- Marking a Request as Complete on page 400

- Running Pre-Configured Actions for the Request Packet on page 401

Note: If a request contains attached documents, it can only be completed after a request packet has been generated. For more information on generating a PDF packet for a request, see Finalizing a Request on page 383.

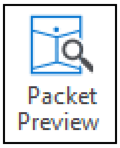
Previewing the PDF Packet

Before printing or saving a request to file, you may want to preview the associated PDF packets to ensure all of the desired documents are included and in the appropriate release order. You can also view packets after the associated request has been completed.

You can view a PDF packet only after it has been generated by the ROI Packet Generation service.

To view the PDF packets associated with a request:

1. Open the appropriate request.
2. Click the **Packet Preview** or **View Packet** button from the ribbon. The button's label varies depending on whether the request is completed.



The Packet Preview view is displayed.

- If the request has the **Separate By Chart** option enabled, then the request may be associated with multiple packets. Select a packet from the left pane to display it in the viewer. If packet generation is in progress, the progress is displayed as a percentage next to the packet name.
- The PDF packet is displayed according to system-specified settings and may contain additional formatting, such as page numbers, black-and-white or color pages, and page headers.
- The PDF packet contain a bookmark for each document. To navigate to a specific document in the packet, display the bookmark panel of the PDF reader and click the desired document.

Note: Notes attached to a document are not displayed on the document itself but rather on a separate page after the document. If a note is not included on this page, its Note Type may be configured to never be printed.

Printing a Request

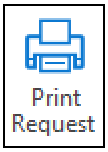
After a request has been successfully finalized, the request can be printed. The printed document will include the generated request packets, as well as any documents that are automatically generated based on the selected Request Type.

Note: An invoice is only included if one has been generated. For more information on generating an invoice, see Billing a Requester on page 387.

Caution: After a request with the status of **Pending Delivery** has been printed or saved to file for the first time, its status changes to **Complete**. Once a request is **Complete**, you cannot update its contents.

To print a request:

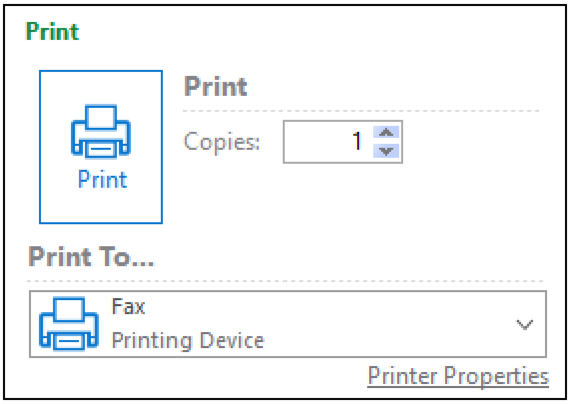
1. Open the appropriate request.
2. Click the **Print Request** button from the **Release of Information** tab.



A notification is displayed if payment for this request is required before it can be released to the requester. Click **Cancel** to return to the request, or click **OK** to override the settings and print the request.

Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.

3. The **Print ROI Request** dialog box is displayed.

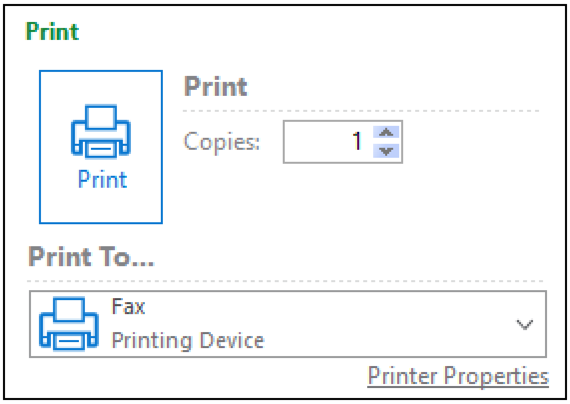


4. Configure the desired print settings and click **Print**.

Note: See the next section for information on how to configure print settings.

Configuring Print Settings

The following section outlines how to configure print settings when presented with the **Print** dialog box, **Print ROI Request** dialog box, the **Print Rejection Letter** dialog box, the **Print Invoice** dialog box, or the Print pane. All instances contain the same options.



To configure print settings:

1. In **Copies**, type or select the number of copies you want to print.
2. Select one of the available printers from the **Print To** drop-down list.

Note: Click the **Printer Properties** hyperlink to configure options specific to the selected printer. See the documentation for your printer for more information on these options. This hyperlink is not available when printing to a print queue. These selections are retained for the duration of your OnBase session.

3. From the **Settings** drop-down list, select **Grayscale** or **Color** to print the document in either black and white or color, respectively.

Note: Whether a request is able to fully be printed in color depends on system configuration (i.e., if you select **Color**, the attached documents may appear to be printed in grayscale, while the cover sheet and inventory pages are printed in color). To determine whether the packet is able to be printed in color, preview the request packet prior to printing or contact your system administrator.

4. Click **Print** after you have configured your settings.

Saving a Request to File

After a request has been successfully finalized, the request can be saved to file. This process saves the associated request packets (if available) as well as any automatically generated documents (such as the cover page) to a local or network location you specify.

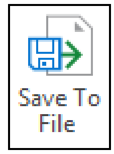
Depending on the Request Type, the saved packet files may include a cover page, invoice, inventory pages, and requested documents.

Note: An invoice is only included if one has been generated. For more information on generating an invoice, see Billing a Requester on page 387.

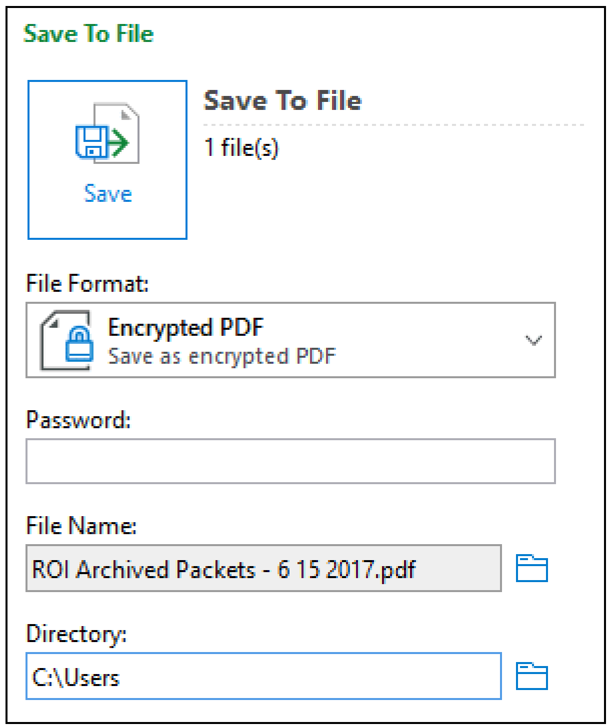
Caution: After a request with the status of **Pending Delivery** has been printed or saved to file for the first time, its status changes to **Complete**. Once a request is **Complete**, you cannot update its contents.

To save a request to file:

1. Open the appropriate request.
2. Click the **Save to File** button from the **Release of Information** tab.



The **Save To File** pane is displayed. The number of files that will be saved is displayed to the right of the **Save** button.



3. From the **File Format** drop-down list, select one of the following options:
   - **Encrypted PDF** - Saves each file as an encrypted PDF, which requires anyone attempting to view the file to provide a password.
   - **Unencrypted PDF** - Saves each file as a standard PDF. No password is required when you select this option.
4. If you selected **Encrypted PDF**, enter a password in the **Password** field. You will need to provide this password to anyone who should be able to view the resulting files.
5. To change the name of the file, click the **Browse** button next to the **File Name** field. The **Save As** dialog box is displayed, allowing you to edit the name as desired.

   The **File Name** field is available only if a single file is being saved. If multiple files are being saved, the files are named based on the associated packet.

6. To specify the directory in which the file should be saved, click the **Browse** button next to the **Directory** field. The **Browse For Folder** dialog box is displayed, allowing you to select the folder where the file should be saved.
7. Click **Save**.

Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.

Marking a Request as Complete

Caution: Once a request is completed, it cannot be undone. You can no longer update a request after it is complete. Only the **Comments** field can be modified.

After a request has been successfully finalized and payment for the request has been received, you can mark a request as complete without printing the request or saving it to file. When you mark a request as complete, any pre-configured system actions for the request packet are also performed. Pre-configured system actions can include sending the request packet to HL7, Workflow, or both.

Note: HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.

To mark a request as complete:

1. Open the appropriate request.
2. Click the **Mark as Complete** button from the **Release of Information** tab.

3. Click **Yes** at the prompt to complete the request and run any pre-configured system actions.

   The **Mark as Complete** button is replaced with the **Run Packet Actions** button.

Note: The **Run Packet Actions** button is only enabled if there are actions configured for the facility. After you click the **Mark as Complete** button, any pre-configured packet actions are run. It is only necessary to click the **Run Packet Actions** button if the actions need to be performed again.

Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 402.

Running Pre-Configured Actions for the Request Packet

After a request is complete, you can select to run any pre-configured system actions for the request packet. Pre-configured system actions can include sending the request packet to HL7, Workflow, or both.

Note: HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.

You may or may not need to run system actions, depending on the method used to complete the request:

- If the request was completed using either the Print Request o the request or saving it to file, pre-configured system actions are not automatically performed. Run packet actions if necessary.
- If the request was completed using the **Mark as Complete** button, pre-configured system actions are automatically performed. Only run packet actions if they need to be performed again.

To run pre-configured system actions for a request:

1. Open the appropriate request.
2. Click the **Run Packet Actions** button from the **Release of Information** tab.

Note: The **Run Packet Actions** button is enabled only if there are actions configured for the facility.

A notification is displayed. If the actions have not been run previously, you are notified that system actions can export the packet and make it available outside of Release of Information. If the actions were previously performed, you are notified that system actions have already been completed.

3. Click **Yes** to run the actions.

Working with System-Generated Documents

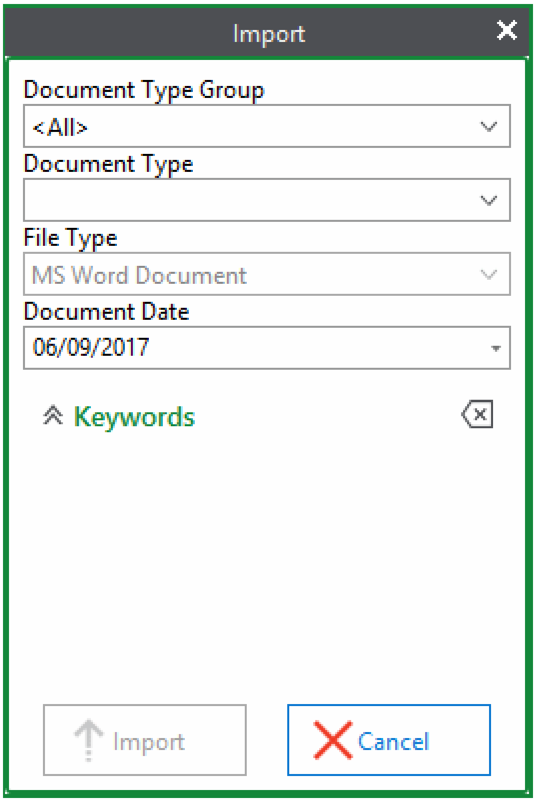
When you execute certain processes within Release of Information, documents may be automatically generated and displayed. Depending on your system configuration, you may be required to take action on these system-generated documents before completing a task.

The below process outlines what to do if you are presented with a preview of the document and or prompted to upload the document:

1. If the document is displayed, modify the document, if necessary. Depending on your system configuration, the document may be read-only.
2. Select from the following buttons on the **Document Composition** tab:

Button	Description
Accept	Saves the document. **Note:** You must accept the document before the selected task can be completed
Redo	Starts the document creation process over from the beginning.
Cancel	Discards the document.
Print	Prints the document.

3. If applicable, update the values in the **Import** dialog box.



   Depending on your system configuration, Keyword Values may already be populated. Specify additional Keyword Values, if necessary, and supply any other necessary values to index the document.

4. Click **Import**. The document is imported into OnBase.

Placing and Removing Holds

If you reach a point where you are no longer working on a request, you are able to place the request on hold, depending on your rights. For example, you are awaiting more information from the person submitting the request and cannot work on it until that information is received.

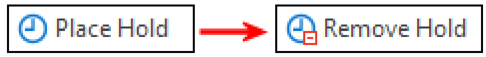
Note: Once a request is finalized, the option to place the request on hold is no longer available.

Placing a request on hold puts it in a read-only state. Depending on your rights, the only actions available for the request while the hold is active are cancel, assign, and unassign. Once you are ready to begin working on the request again, you can remove the hold.

Tip: If your time worked on a request is being logged, it may be helpful to place a request on hold when leaving your desk.

To place a request on hold, open the appropriate request and click the **Place Hold** button from the **Release of Information** tab. The request is placed on hold and cannot be modified.

The **Place Hold** button toggles to become the **Remove Hold** button.



To remove the hold and begin working on the request again, click the **Remove Hold** button from the **Release of Information** tab. The request is no longer on hold, and the request can once again be modified. Depending on your system's settings, the **Request Due Date** may be recalculated to account for the number of days the request was on hold.

Viewing Request History

Actions performed on a request and the status changes of a request are stored in the request history. The request history maintains two separate logs:

- Request Log - records all actions performed on a request (e.g., when the request is assigned, viewed, etc.).
- Status Log - records all the status changes of a request (e.g., when a request status is changed to **Rejected**).

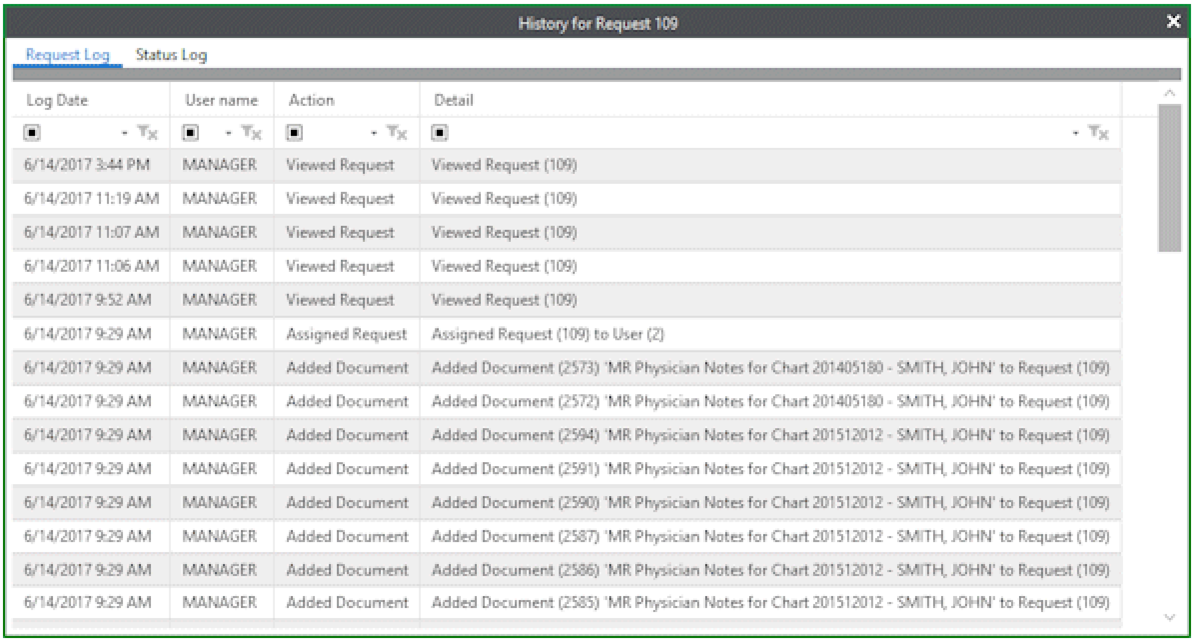
To view the history of a particular request:

1. Retrieve and open the appropriate request.
2. Click the right portion of the **History** button from the **Release of Information** tab.

   You can also click the left portion of the button if you want to view the Request Log portion of the request history.

3. From the drop-down list, do one of the following:
   - Select **Request** to display the Request Log portion of the request history.
   - Select **Status** to display the Status Log portion of the request history.

   Depending on which option you selected, that tab is displayed in the **History** dialog box. You can toggle between Request Log and the Status log by clicking the appropriate tab.



Log Date	User name	Action	Detail
6/14/2017 3:44 PM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:19 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:07 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:06 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 9:52 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 9:29 AM	MANAGER	Assigned Request	Assigned Request (109) to User (2)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2573) 'MR Physician Notes for Chart 201405180 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2572) 'MR Physician Notes for Chart 201405180 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2594) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2591) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2590) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2587) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2586) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2585) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)

Viewing the Request Authorization Form

If a request was created using the **Create Release of Information Request** Workflow action, then the **Authorization Form** button is available from the **Release of Information** tab of an open request.

To view the authorization form that triggered the creation of the request via Workflow, click the **Authorization Form** button.

Keyboard Shortcuts

The following keyboard shortcuts are available within the Request Editor window (i.e., an open request).

Shortcut	Description
Ctrl + S	Saves the request.
Ctrl + N	Closes the current request and creates a new request. You are prompted to save any unsaved changes before closing.
Ctrl + R	Displays the **Cancel / Reject Request** dialog box.
Ctrl + F	Either finalizes and creates a PDF packet for the request or sends the request forward for approval (if required).
Ctrl + H	Places a hold on the request.
Ctrl + P	Prints the documents attached to the request.
Ctrl + Shift + A	Displays the **Assign Request** dialog box. **Note:** Depending on your privileges, this shortcut may automatically assign the request to you without displaying the **Assign Request** dialog box.
Ctrl + Shift + U	Unassigns the request.
Ctrl + E	Displays the request form.
Ctrl + T	Displays the **Attachments** list.
Ctrl + L	Displays the **Release Order** list.
Esc	Closes the Request Editor window.

ROI User Options

From the **Release of Information** tab of the **User Options** dialog box, you can control certain prompts and actions within the Release of Information interface.

To access ROI user options:

1. Click the Application button and select **User Options**.
2. The **User Options** dialog box is displayed.
3. Select **Release of Information**.

4. Choose from the following:

Option	Description
Prompt me when deleting Document Types from a request	Enables a prompt that alerts you when removing Document Types from a request. When you remove a Document Type from a request, it is removed from all charts on the request.
Default facility for new requests	Select a default facility for new requests from the drop-down list. This facility is automatically selected when you create new requests. Select **<None>** from the drop-down list if you do not want to select a default facility. No facility is automatically selected when you create new requests. **Note:** When either a facility or **<None>** is selected, you are not prompted to select a default facility when creating a new request.
Prompt me when removing my documents from the Virtual Print Gallery	Enables a prompt that alerts you when removing your documents in the Virtual Print Gallery. This prompt is only applicable to documents you printed. When removing documents other users printed, you are always prompted. **Note:** The **Prompt me when removing my documents from the Virtual Print Gallery** option is only available when you are licensed for Virtual Print Driver.

Option	Description
Automatic External Document Retrieval	Determines whether external system documents are automatically retrieved upon closing a request that you have selected to add external system documents to. Choose from the following: • **Always** - Automatically retrieves external system documents upon closing the request. • **Never** - Never retrieves external system documents upon closing the request. The process must be completed manually. • **Prompt** - Prompts whether you would like to retrieve external system documents upon closing the request. From the prompt, you can decide whether to always retrieve external system documents or never retrieve external system documents upon closing a request by selecting **Always do this when closing a request** and clicking **Yes** to automatically start retrieval or **No** to manually retrieve documents later. **Note:** The **Automatic External Document Retrieval** option is only available when you are licensed for Report Capture for Meditech.

5. Click **Save** when finished.

ROI and the Virtual Print Driver

If your solution includes the Virtual Print Driver module, then OnBase Release of Information can attach documents printed and uploaded using the Virtual Print Driver to a request.

Documents can be attached to a request automatically upon uploading the document into OnBase, or they can be selected and attached manually.

Consider the following when printing using the Virtual Print Driver:

- Running more than one type of OnBase client may conflict with ROI's ability to detect incoming documents. For example, do not open both the Medical Records Unity Client and the OnBase Unity Client at the same time.
- The size of a print job affects printing time. A document with a large quantity of pages printed in color is going to take longer to print than a one-page document printed in black and white.

For more information on using the Virtual Print Driver, as well as Virtual Print Driver troubleshooting tips, see the **Virtual Print Driver** documentation.

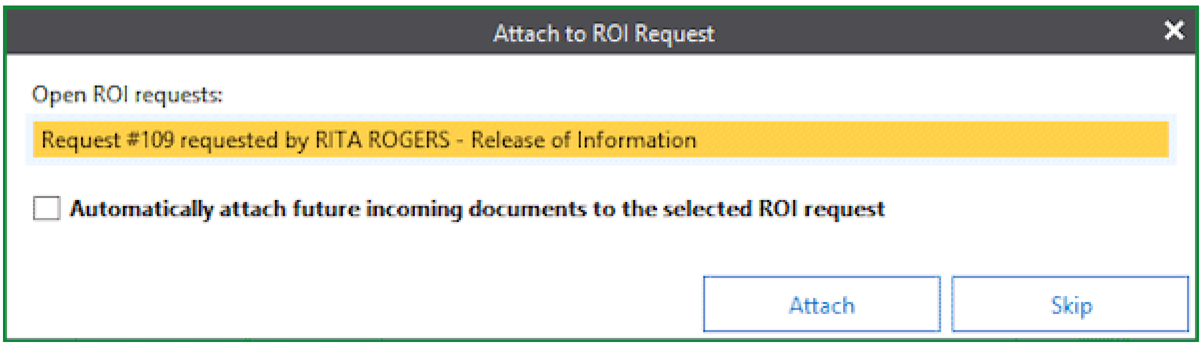
Automatically Attach Incoming Documents to a Request

Once a document is printed and uploaded using the Virtual Print Driver, it can automatically be attached to a request. You can also choose to have all incoming documents printed with the Virtual Print Driver to be automatically attached to an open request during a given session.

Note: For more information on printing and uploading documents to OnBase using the Virtual Print Driver, see the Unity Client usage information in the Virtual Print Driver documentation.

To automatically attach a document to a request using the Virtual Print Driver:

1. Open the ROI request(s) you would like to attach documents to.
2. Print a document using the Virtual Print Driver.
3. Follow the prompts to import the document into OnBase.
4. The **Attach to ROI Request** dialog box is displayed after the document is imported.



5. Select the request you would like the document to be attached to.

   If you do not want to add the document to one of the listed requests, click **Skip**. The document is then available to select and add to a request by clicking the **Add From Virtual Print Gallery** button from an open request. For more information, see the Select Printed Documents to Attach to a Request section.
6. Do one of the following:
   - To attach the incoming document to the request, click **Attach**.
   - To attach the incoming document and all future incoming documents to the selected request while the request remains open, select **Automatically attach future incoming documents to the selected ROI request**, and then click **Attach**.

Note: When you select **Automatically attach future incoming documents to the selected ROI request** and click **Attach**, the **Attach to ROI Request** dialog is not displayed again until you either close the selected request, open another request, create a new request, or log out and log back in.

Depending on options you selected during the upload process, the document may be displayed in a new window. You can close the document after clicking either **Attach** or **Skip** in the **Attach to ROI Request** dialog box.

7. Save the request.

   If you exit the request without saving these changes, the newly added documents are removed from the request. You can add them back to the request by clicking the **Add From Virtual Print Gallery** button. For more information, see the Select Printed Documents to Attach to a Request section.

Select Printed Documents to Attach to a Request

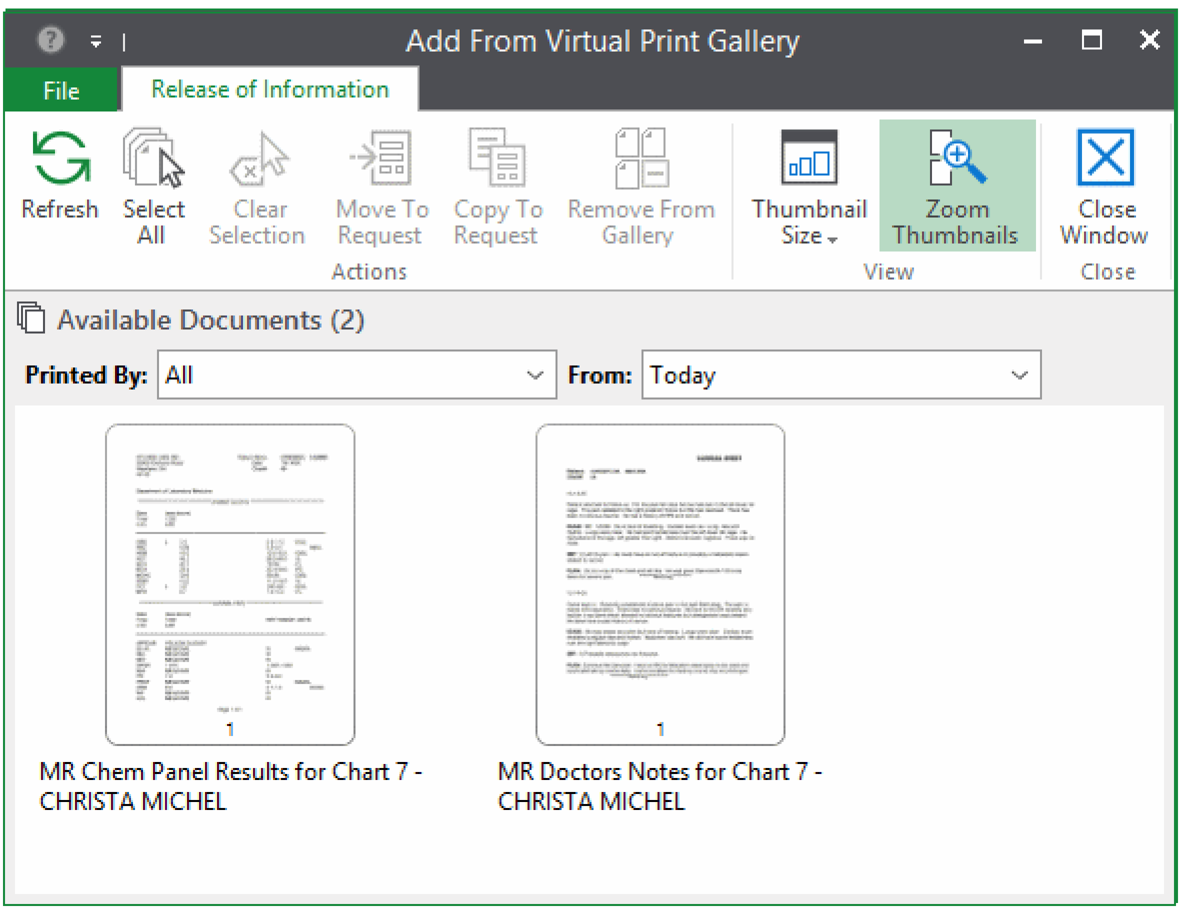
Documents that are printed with the Virtual Print Driver and are not attached to a request upon being uploaded can be manually selected and attached to the request.

To select and attach documents printed with the Virtual Print Driver:

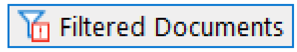
1. From an open request, click the **Add From Virtual Print Gallery** button in the **Release of Information** ribbon.

Note: The appearance of the **Add From Virtual Print Gallery** button differs based on licensing.

The **Add From Virtual Print Gallery** dialog box is displayed. Documents printed and uploaded with the Virtual Print Driver are displayed in the **Available Documents** list by the date and time they were added in descending order.



Depending on your rights, some documents may be filtered from the **Available Documents** list. The following icon is displayed in the upper right-hand corner of the **Available Documents** list in this scenario:



Note: For more information on Document Type rights, contact your system administrator.

2. Narrow the results in the **Available Documents** list using the following drop-down lists:

Drop-down List	Description
Printed By	Displays only documents printed by the selected user. By default, your User Name is selected. Available users include only those who have printed documents using the Virtual Print Driver. To view documents printed by all users, select **All**.
From	Displays only documents printed within the selected time frame. By default, **Today** is selected. To view documents printed at any time, select **All**. You can also select to view documents printed in the **Last 7 Days** or **Last 30 Days**.

Tip: To update the list at any time, click the **Refresh** button. This option is also available from the right-click context menu.

3. Do one of the following:
   - Click each document you would like to add to the request.
   - Click the **Select All** button to select all available documents.

You can also press **Ctrl + A** to select all available documents. This option is also available from the right-click context menu.

For information on previewing documents before attaching them, see the Previewing Printed Documents Before Attaching Them to a Request section.

To deselect selected documents, click each document again, or click the **Clear Selection** button to deselect all selected documents.

This option is also available from the right-click context menu.

Note: Filtering the list of available documents deselects any document filtered out of the list. For example, you select Document A and Document B. Upon changing the User Name in the **Printed By** drop-down list, Document B is no longer displayed. At this time, Document B is not selected. It must be filtered back into the list and selected again to be attached to the request.

4. Once you have selected the appropriate documents, do one of the following:
   - Click the **Move To Request** button to attach the selected documents to the request and remove them from the **Available Documents** list.

     This option is also available from the right-click context menu.

Note: If you close the request without saving it after moving selected documents, the selected documents are available the next time you access the **Add From Virtual Print Gallery** dialog box. Documents are only permanently removed from the **Available Documents** list after the request has been saved.

   - Click the **Copy To Request** button to attach the selected documents to the request. The documents remain in the **Available Documents** list.

     This option is also available from the right-click context menu.

   The documents are attached to the request and can be viewed in the **Attachments** layout.
5. Save the request. If you exit the request without saving these changes, the documents are removed from the request. Any documents removed from a request in this type of scenario become available to add to a request the next time you access the **Add From Virtual Print Gallery** dialog box.

Previewing Printed Documents Before Attaching Them to a Request

When selecting printed documents to attach to a request, you can change the way document thumbnails are displayed or view the document in a new window. See the following sections for more information:

- Using the View Buttons
- Opening a Document in a New Window

Using the View Buttons

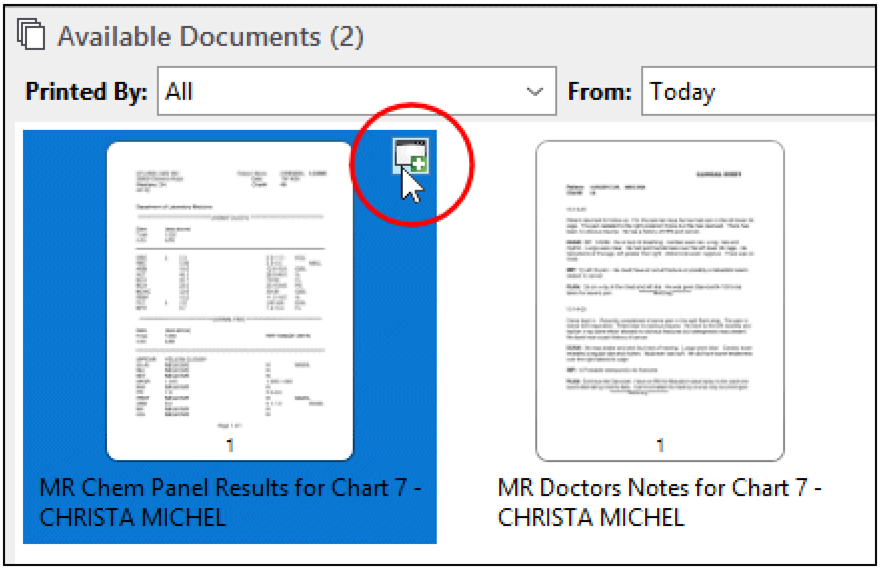
The **View** buttons in the **Add From Virtual Print Gallery** dialog box control how document thumbnails are displayed in the **Available Documents** list.

View Button	Description
Thumbnail Size 	Determines the size of the thumbnail. When you click this button, you can choose from **Small**, **Medium**, or **Large**. By default, **Medium** is selected. This option is also available from the right-click context menu.
Zoom Thumbnails 	Toggles whether thumbnails are zoomed in while hovering the mouse over them. If this setting is selected, a zoomed-in view of the thumbnail is displayed when you rest your pointer over it. The zoom percentage is determined by the thumbnail size. For example, the zoom is greater when the thumbnail size is **Large** instead of **Medium**. If this setting is deselected, a tooltip displays information about the document when you rest your pointer over the thumbnail. The information includes the document Auto-Name string, the date and time the document was uploaded, the Document Type, and the number of pages included in the document. This option is also available from the right-click context menu.

Opening a Document in a New Window

To view a document and all of its pages in a new window from the **Add From Virtual Print Gallery** dialog box, do one of the following:

- Double-click the document thumbnail.
- Rest the mouse over the document thumbnail, and then click the **Open in New Window** button.



Tip: If the **Zoom Thumbnails** button is selected, it may help to deselect it so that the enlarged thumbnail does not hide the **Open in New Window** button.

The document is displayed in the Document Viewer window. The ribbon above the Document Viewer allows you to use one of the following buttons to select or deselect the current document in the **Add From Virtual Print Gallery** dialog box:

Button	Description
Add To Selected 	Selects the document in the **Add From Virtual Print Gallery** dialog box. This button is available only if the document is not currently selected.
Remove From Selected 	Deselects the document in the **Add From Virtual Print Gallery** dialog box. This button is available only if the document is currently selected.

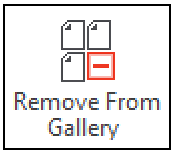
Note: For information on using the Document Viewer, see the Medical Records Unity Client documentation.

Removing Printed Documents from the Gallery

You can remove documents from the Virtual Print Gallery.

To remove one or more documents from the Virtual Print Gallery:

1. Select the appropriate documents from the **Available Documents** list in the gallery.
2. Do one of the following:
    - Click the **Remove From Gallery** button.



    - Right-click and select **Remove From Gallery**.

Note: Depending on your configuration or the document(s) you are removing, you may be prompted to confirm this action. Ensure other users do not need the documents before removing them from the gallery.

ROI and Report Capture for Meditech

If your solution includes the Report Capture for Meditech module, then OnBase Release of Information can be used to import and attach external system (e.g., Meditech) documents to be released in a request.

When attaching Document Types to a request, some of the documents contained within these Document Types may reside in an external system. These documents must be retrieved from the external system to be attached to and released with the request. For general information on attaching Document Types to a request, see Attaching Charts and Documents Using the Wizard on page 349.

Proceed to the next section to retrieve external system documents.

Note: See the Report Capture for Meditech documentation for more information on external system configuration.

Retrieving External System Documents

Once you have attached Document Types to a request, you are able to retrieve and attach external system documents associated with them.

Note: Depending on your settings, retrieval may automatically occur upon closing the request, or you may be prompted to automatically retrieve external system documents upon closing a request. For more information on configuring automatic external document retrieval, see ROI User Options on page 406.

To manually retrieve external system documents from the external system:

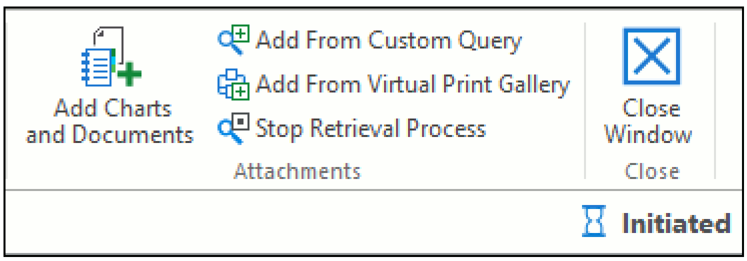
1. Be sure you have selected the appropriate Document Types containing external documents. For more information on attaching Document Types to a request, see Attaching Charts and Documents Using the Wizard on page 349.
2. Click the **Retrieve External Documents** button from the **Release of Information** tab of the request.

Note: The appearance of the **Retrieve External Documents** button differs based on licensing.

3. Upon clicking the **Retrieve External Documents** button, a prompt may be displayed:

   The retrieval process may take a while. It is recommended you close the request now and reopen it when the retrieval process is complete. The current status of the retrieval process is displayed in the **Active Requests** list. Continue?

4. If the above prompt is displayed, do one of the following:
   - Click **OK** to begin the retrieval process.
   - Select the **Do not prompt me again** option on the prompt to disable the prompt in the future, and then click **OK** to begin the retrieval process. This prompt cannot be enabled after it is disabled (i.e., you won't be informed about the retrieval process next time you click the **Retrieve External Documents** button).
   - Click **Cancel** to cancel the retrieval process.
5. You are notified external document retrieval was successfully initiated.
   - The **Retrieve External Documents** button is toggled to the **Stop Retrieval Process** button.
   - An hourglass is displayed in the request header.



At this point, it is recommended you close the request until the retrieval process is complete.

Note: During a retrieval process, you cannot add charts or documents to the request from the Add Charts and Documents wizard without first stopping the retrieval process. For more information, see the section on stopping an external system document retrieval process.

Stopping External System Document Retrieval

Once an external system document retrieval process is started, the **Retrieve External Documents** button is toggled to the **Stop Retrieval Process** button. You can stop a retrieval process by clicking this button.

Note: The appearance of the **Stop Retrieval Process** button differs based on licensing.

A retrieval process is also be stopped by doing one of the following:

- Canceling or rejecting the request.
- Clicking the **Add Charts and Documents** button and clicking **Yes** at the prompt.

Note: Although unlikely, once the process is stopped (either by user intervention or an error), some of the external documents may still be added to the request.

Checking the Status of External System Document Retrieval

From the **Active Requests** list of the Release of Information layout, you can determine what requests have attempted to retrieve external system documents by viewing the **Status** column.

Note: For more information on viewing the **Active Requests** list, see Opening Release of Information on page 302.

Requests that have attempted to retrieve external system documents display one of the following icons next to the status in the **Status** column:

Icon	Status Description
	External system document retrieval is in progress. This process may take a while. **Tip:** To expedite the process, you should not have the request opened. The **Attachments** list cannot be updated if the request is locked.
	External system document retrieval is successfully complete.
	External system document retrieval stopped, due to an error during the retrieval process.

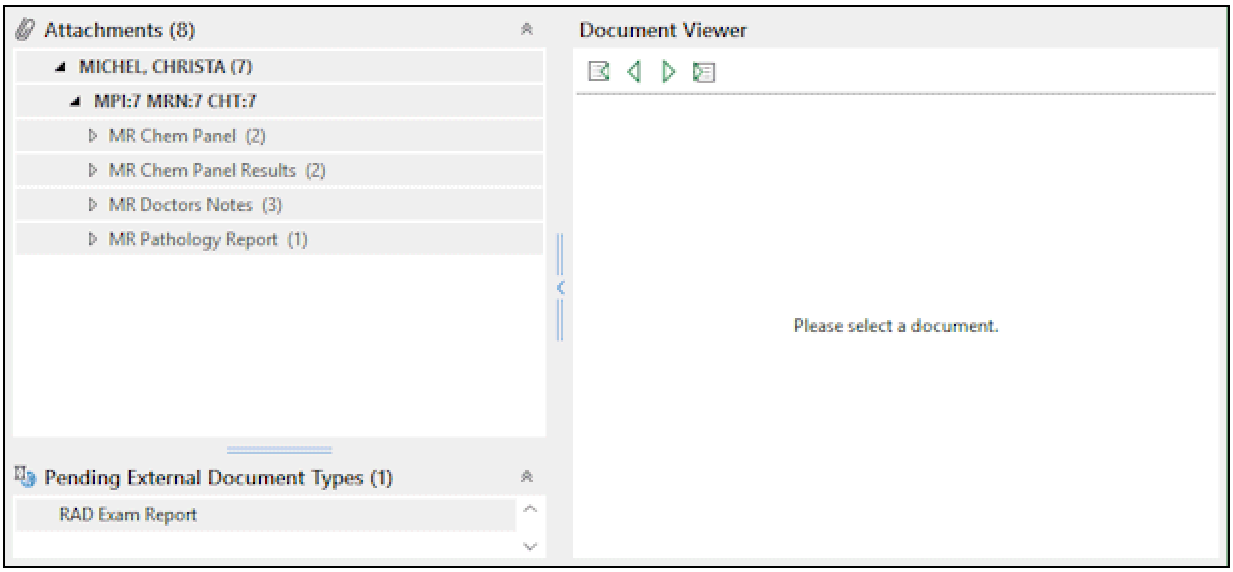
Viewing Pending External System Document Types

After external document retrieval has been initiated, you can view the Document Types containing external documents that have not been retrieved. This includes Document Types that either are in the process of being retrieved or still need to be retrieved (e.g., after an external system document retrieval process is stopped).

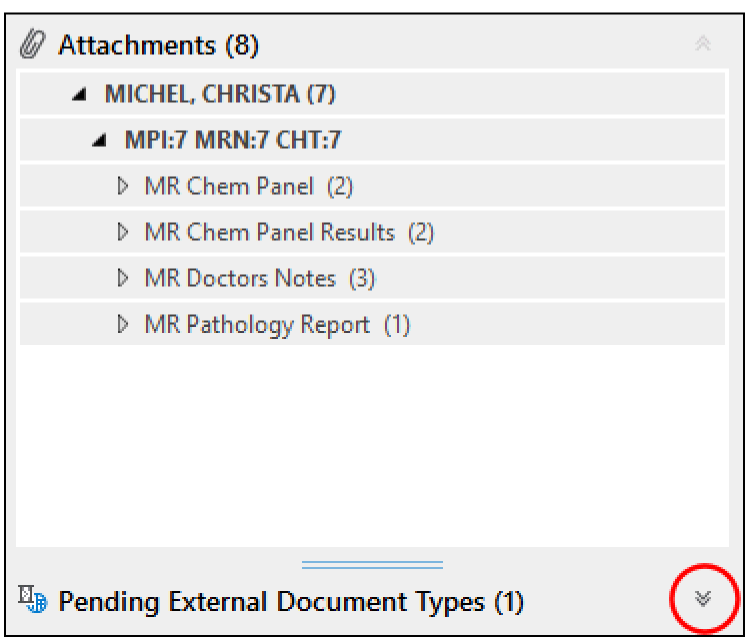
To view all pending Document Types that have not been fully added to the request:

1. Retrieve and open the appropriate request.
2. Click the **Attachments** button from the **Release of Information** tab.

The **Attachments** layout is displayed.



3. Expand the **Pending External Document Types** pane (if necessary).



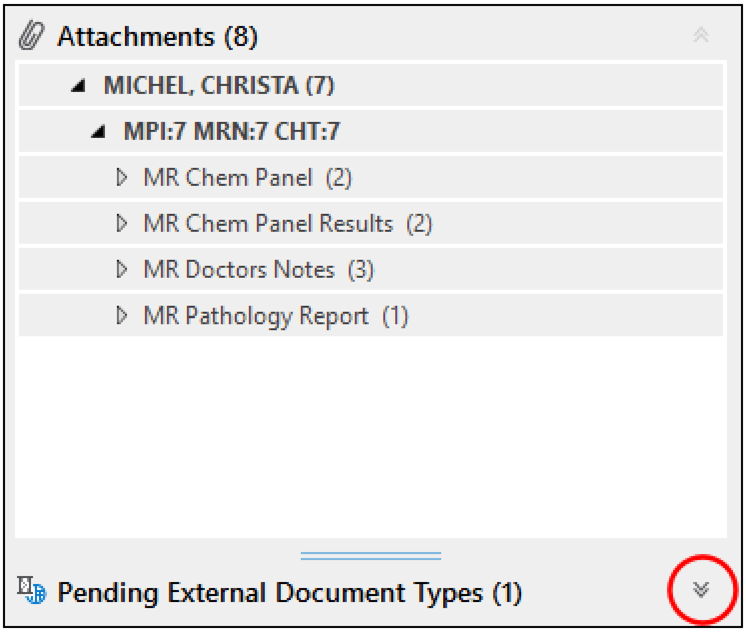
4. All Document Types that have not been retrieved are displayed in the **Pending External Document Types** pane.

Removing Pending Document Types

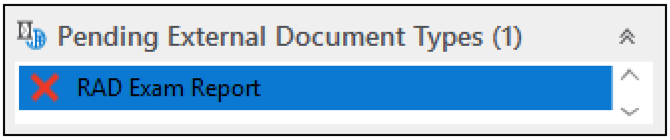
All Document Types containing external system documents that have not been fully retrieved are listed in the **Pending External Document Types** pane in the **Attachments** layout of a request.

To remove a pending Document Type from the request, from the **Attachments** layout:

1. Expand the **Pending External Document Types** pane (if necessary).



2. Rest the mouse pointer of the appropriate Document Type in the **Pending External Document Types** pane.
3. Click the red **X** on the left side of the list.

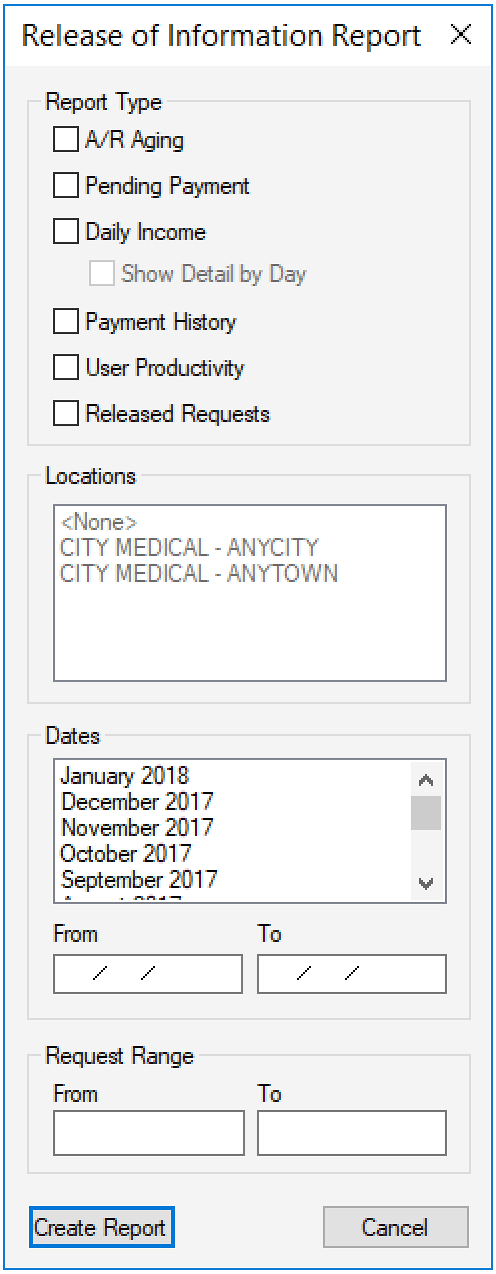


The Document Type, including any documents (OnBase or external) from that Document Type that have already been retrieved, is completely removed from the request.

Running Release of Information Reports

Users with administrative ROI privileges can run ROI accounts receivable reports from the OnBase Client.

1. From the OnBase Client, select **Admin | Release of Information Reports | Generate Report(s)**. The **Release of Information Report** dialog box is displayed.



2. Select a **Report Type**. Available report types are described in the following table:

Report Type	Description
A/R Aging	This report displays information about outstanding bills organized by number of days outstanding (fewer than or equal to 30 days, within 31 to 60 days, within 61 to 90 days, and more than 90 days past due).
Pending Payment	This report displays the total amount owed per location and the grand total amount due for all selected locations.
Daily Income	This report groups outstanding bills by date billed and lists both amount due for each bill and the grand total amount due. The **Show Detail by Day** option lists amount due for each day in which a request was billed.
Payment History	This report groups paid requests by location. The report lists the total number of days to pay for a specific request and the average number of days to pay per location.
User Productivity	This report lists the number of requests completed by each user who has ROI privileges and the average number of days each user took to complete the requests. If a user's average days to complete a request is less than 0.1, but the user has completed at least one request, then the user's average days to complete is rounded up to 0.1. If a user has not completed any requests within the report parameters, then an average of 0.0 days is displayed for that user.
Released Requests	This report helps address HIPAA requirements by displaying information about requests that have been released or delivered from OnBase. The following information is listed for each completed request: Request number; requester's name, location, and company; patient's name; purpose; delivery method; date/time released; total number of days to release; number of pages, external pages, and external items; and the total billed amount. If a request is re-delivered using a different delivery method, the report reflects the last delivery method used and the last date of release. At the end of the report, the total number of released requests and the average number of days to release each request are displayed.

3. Under **Location**, select one or more locations to include in the report. To include locations that were not saved, select **<None>**.
4. Specify a date and/or request number range.
5. Click **Create Report**. The report is displayed. You can also retrieve the report from the Document Type configured for ROI reports at a later date.

The Release of Information module in the OnBase Medical Records Unity Client allows you to create and process requests for patient medical information.

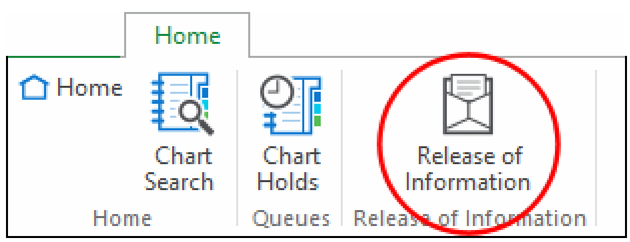
Existing requests can be managed from the Release of Information layout, where you can also create new requests and manage existing requests.

Opening Release of Information

The Release of Information layout is a dashboard that allows you to do the following:

- Open and manage requests
- View your assigned requests
- Assign and unassign requests
- Create new requests

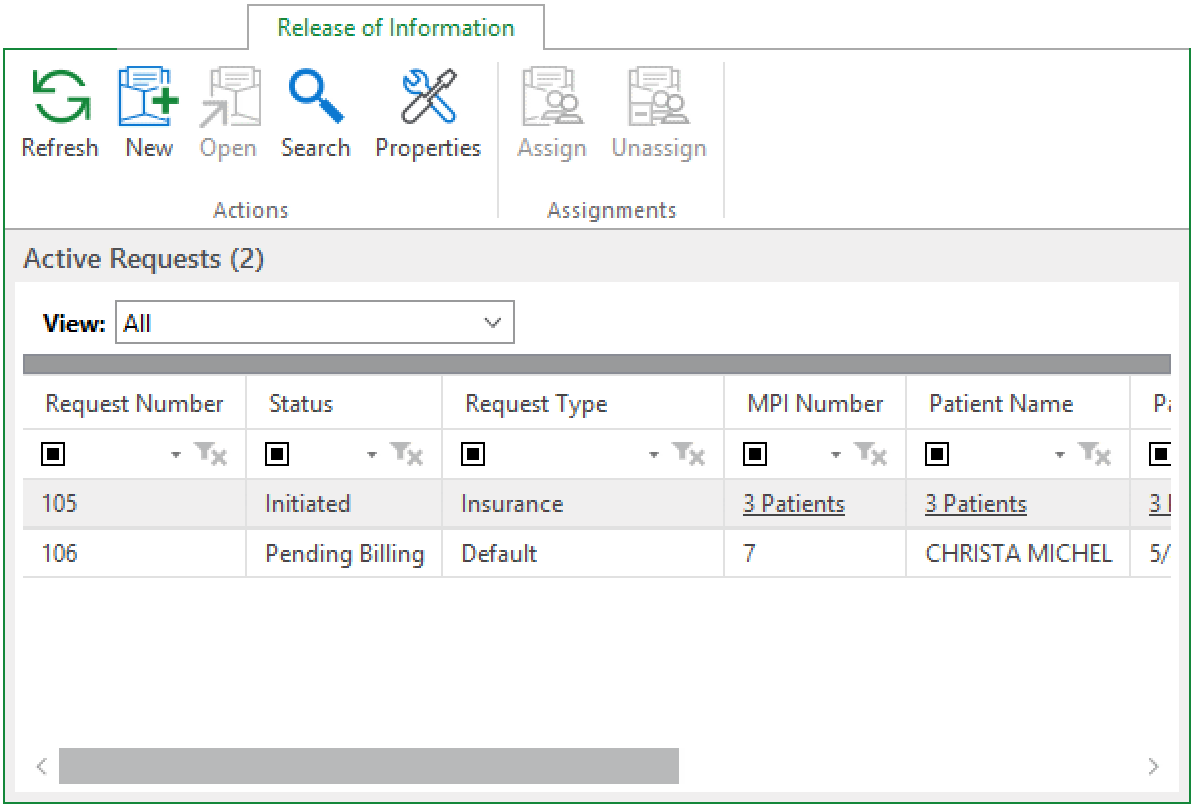
To open the Release of Information layout, click the **Release of Information** button, located on the **Home** tab in the OnBase Medical Records Unity Client.



Tip: To access Release of Information automatically when you log in, set **Release of Information** as your **Startup Page**. This setting is available under **Client Options** in User Options.

If you do not have a Medical Records or HL7 license, the Release of Information layout is displayed automatically upon login.

Upon opening, the Release of Information layout displays open requests in the **Active Requests** list. Active requests are requests awaiting user interaction. For information about columns available in the list, see Request Columns and Search Fields on page 510.



Note: Requests with a status of **Completed** or **Canceled** are not displayed in the **Active Requests** list. To retrieve these requests, use the search functionality. See Searching for a Request on page 427.

Refreshing the Layout

To update the list with the latest available information (e.g., changes, new requests), do one of the following:

- Click the **Refresh** button from the **Release of Information** tab.
- Right-click within the **Active Requests** list and select **Refresh**.

The rows and columns of the list reflect any changes that have occurred since the last time you opened the layout or clicked **Refresh**.

Request Statuses

The **Active Requests** list in the Release of Information layout displays open requests, which may have one of the following statuses:

Status	Description
Initiated	A request that is able to be modified.
Pending Packet	A request that is in the process of being finalized and currently creating the packet of attached documents. Requests with this status are read-only.
Pending Delivery	A request that is paid for and can be delivered to the requester. Requests with this status are read-only.

Note: Requests with a status of **Canceled** or **Completed** are not displayed in the **Active Requests** list. To view these requests, use the search functionality. For more information, see Searching for a Request on page 427.

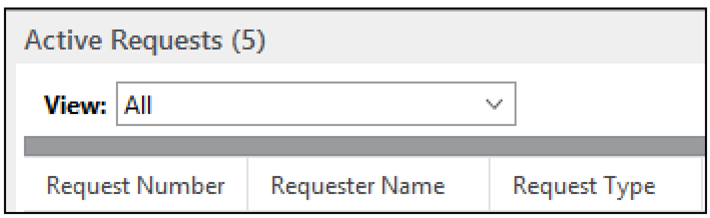
In some instances, an icon may be displayed next to the request status in the **Active Requests** list. The table below lists the icons that may be displayed next to a status.

Icon	Description
Awaiting Packet Creation	A packet for the request is currently being prepared and compiled. For more information on packet creation, see Finalizing a Request on page 481.
Creating Packet	A packet for the request is currently being created. For more information on packet creation, see Finalizing a Request on page 481.
Error Creating Packet	There was an error before or during packet creation. For more information, contact your system administrator. For more information on packet creation, see Finalizing a Request on page 481.
Retrieving External Documents	The request is currently gathering documents from an external source. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 503. **Tip:** To expedite the process, you should not have the request opened. The **Attachments** list cannot be updated if the request is locked. For more information on request locks, see Managing Locks on page 437.

Icon	Description
Document Retrieval Complete	The request has completed gathering external documents. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 503.
Error Retrieving Documents	There was an error retrieving external documents for this request. For more information, contact your system administrator. For more information on external system document retrieval, see ROI and Report Capture for Meditech on page 503.

Filtering Requests

To filter the displayed requests, select a filter from the **View** drop-down. The filter you select is retained across login sessions.



The following filters are available:

- **All** - Displays all open requests.
- **Assigned to me** - Displays all open requests assigned to the current user.
- **Unassigned** - Displays all open requests that are not assigned to any user.

Searching for a Request

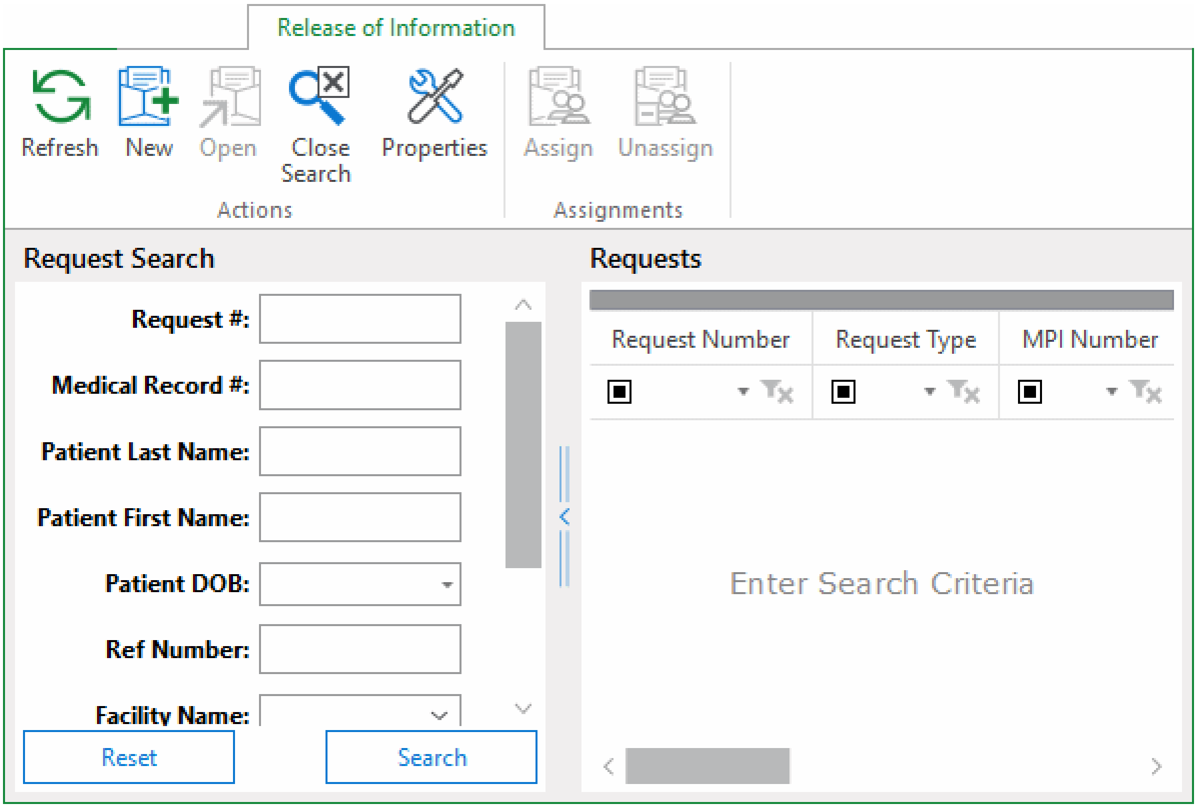
You can search for any request created in the system, as long as the request has been saved.

Requests with the **Canceled** or **Completed** status are read-only and can only be retrieved through a search.

To search for a request:

1. From the **Active Requests** list, click **Search**.

   The **Request Search** screen is displayed.



2. Enter search criteria in the **Request Search** panel. You must provide a value for at least one field.

   For information about possible search fields and columns, see Request Columns and Search Fields on page 510.
3. Click **Search** or press the **Enter** key. Results are displayed in the **Requests** list.

   To clear entered information from the search fields and start over, click **Reset**.

Note: If a search returns more than 100 results, only the first 100 results are listed and a message is displayed instructing you to narrow your search.

Using Wildcard Characters

Wildcard characters (***** or **?**) can help you find charts by expanding your search results.

Type one of the following wildcard characters into the search field to search with values containing one or more unspecified characters:

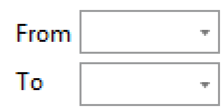
Wildcard	Description
*	The * wildcard character can replace several characters within a search value. For example, the value OLS* would retrieve all instances of Olsen, Olsted, and Olswood.
?	The **?** wildcard character can replace a single character within a search value. For example, the value SM?TH would retrieve instances of both Smith and Smyth.

Note: If you use a wildcard, the search field must contain at least one character that is not a wildcard. For example, you can search for an MRN of **9***, but you cannot search for an MRN by entering only *.

Searching By Date Range

The following examples illustrate how to use date ranges for retrieval.

Date Constraint	Directions	Example
Specific Date	Enter the same date for the **From** and **To** date. This example would find only results with a date of **6/26/2017**.	From 06/26/2017 To 06/26/2017
Specific Date Range	Enter the start date in the **From** field and end date in the **To** field. This example would find results that fall within the date range of **1/1/2017** through **12/31/2017**.	From 01/01/2017 To 12/31/2017
Open-Ended Date Range	Leave one of the fields blank. The first example would find results with a date of **1/1/2017** or later. The second example would find results with a date of **6/26/2017** or earlier.	From 01/01/2017 To From To 06/26/2017

Date Constraint	Directions	Example
None	Leave both fields blank. This example would not restrict results by date.	

Note: If you enter an invalid date, the field will revert to its previous value when you select another field or execute the search.

Assigning and Unassigning Requests

You can assign and unassign requests to other users from the Release of Information layout or from within requests themselves, depending on your privileges. When a request is assigned to another user, only that user can work on the request. When a request is unassigned, any user with appropriate privileges can work on the request.

Assigning a Request

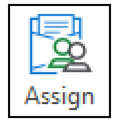
While only one person can access a request at a time, multiple users may attempt to access and modify a request over a period of time if the request is unassigned. Assigning a request can help avoid confusion by restricting the request to only one user.

Depending on your privileges, you may only be able to assign requests to yourself. If you have sufficient privileges, you can assign requests to other available users.

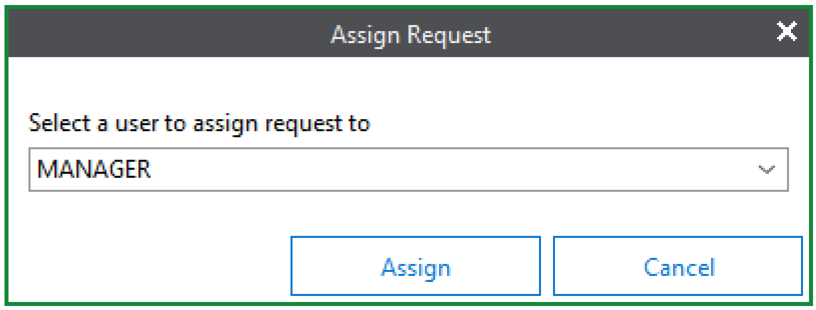
To assign a request:

1. Do one of the following:
   - From the **Active Requests** list of the Release of Information layout, select one or more requests.
   - Retrieve and open the appropriate request.

2. Click the **Assign** button on the **Release of Information** tab.



If you have privileges to assign requests to other users, the **Assign Request** dialog box is displayed. Otherwise, the requests are assigned to you.



3. If applicable, select a user to assign to the request from the drop-down list.

Note: Availability of users depends on user rights. For example, if a facility is selected for the request, the drop-down list does not display users who do not have rights to that facility.

4. Click **Assign**. The request is saved and assigned to the selected user.

Unassigning a Request

If a request should be assigned to a different user, it can be unassigned from the current user.

Depending on your privileges, you may only be able to unassign requests that are assigned to you. If you have sufficient privileges, you can unassign requests from other users.

To unassign a request and make it available to other users:

1. Do one of the following:
   - From the **Active Requests** list of the Release of Information layout, select one or more assigned requests.
   - Retrieve and open an assigned request.
2. Click the **Unassign** button from the **Release of Information** tab.

Upon being unassigned, the request is available to other users. Any unsaved changes on the request are automatically saved.

Viewing Request Properties

Request properties provide information about a request. This information includes the request number, creation date, request type, patient information, number of documents, and number of pages, among other details.

Properties can be viewed from both the Release of Information layout and the request itself.

Note: Date values are displayed according to workstation locale.

Viewing Request Properties from the ROI Layout

When accessed from the Release of Information layout, the properties are displayed in the **Properties** pane on the right side of the layout and include information found on the request form, general request information, payment information, and attachment information. The **Properties** pane is updated to display information about any single request that is selected from the **Active Requests** list.

If more than one request is selected, the pane is cleared.

Tip: To quickly view information about different requests, keep the **Properties** pane open and select requests as needed.

To view request properties from the Release of Information layout:

1. Select a single request.
2. Do one of the following:
   - Click the **Properties** button from the **Release of Information** tab.

   - Right-click the request and select **Properties**.

Viewing Request Properties from an Open Request

When accessed from the request itself, properties are displayed in the **Properties** dialog box. Properties include general request information, as well as information regarding payment and attachments.

To view request properties from an open request, click the **Properties** button from the **Release of Information** tab.

The **Request Properties** dialog box is displayed.

Request Properties

Depending on how you access request properties, the following properties may be displayed:

Note: Date values are displayed according to workstation locale.

Property	Description
Request #	The unique number assigned to the request upon its creation.
Created	The date and time the request was created.
Request Type	The Request Type of the request, specified on the request form.
Created By	The user who created the request.
Assigned To	The user assigned to work on the request.
Status	The current status of the request.
Number of Documents	The number of documents attached to the request.
Number of Pages	The number of pages included in the documents attached to the request.

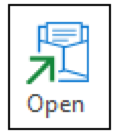
Opening an Existing Request

You can open requests from the **Active Requests** list and the request search results list. You cannot open a request if you do not have permission to view one or more documents attached to the request. See your system administrator for more information.

Note: You cannot select multiple requests and open them all at once.

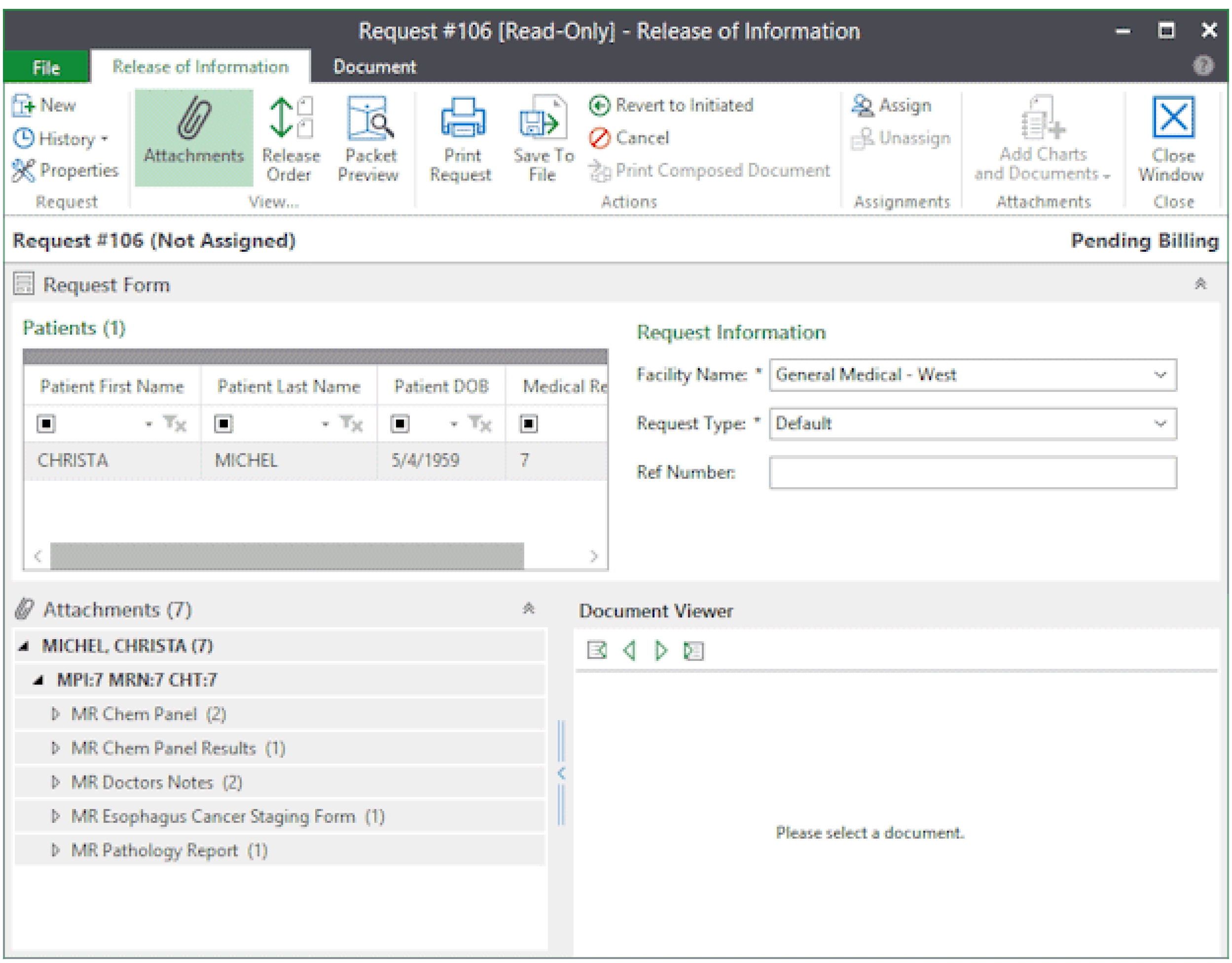
To open a request displayed in the Release of Information layout, do one of the following:

- Double-click the request.
- Select a request from the list, and then click the **Open** button from the **Release of Information** tab.



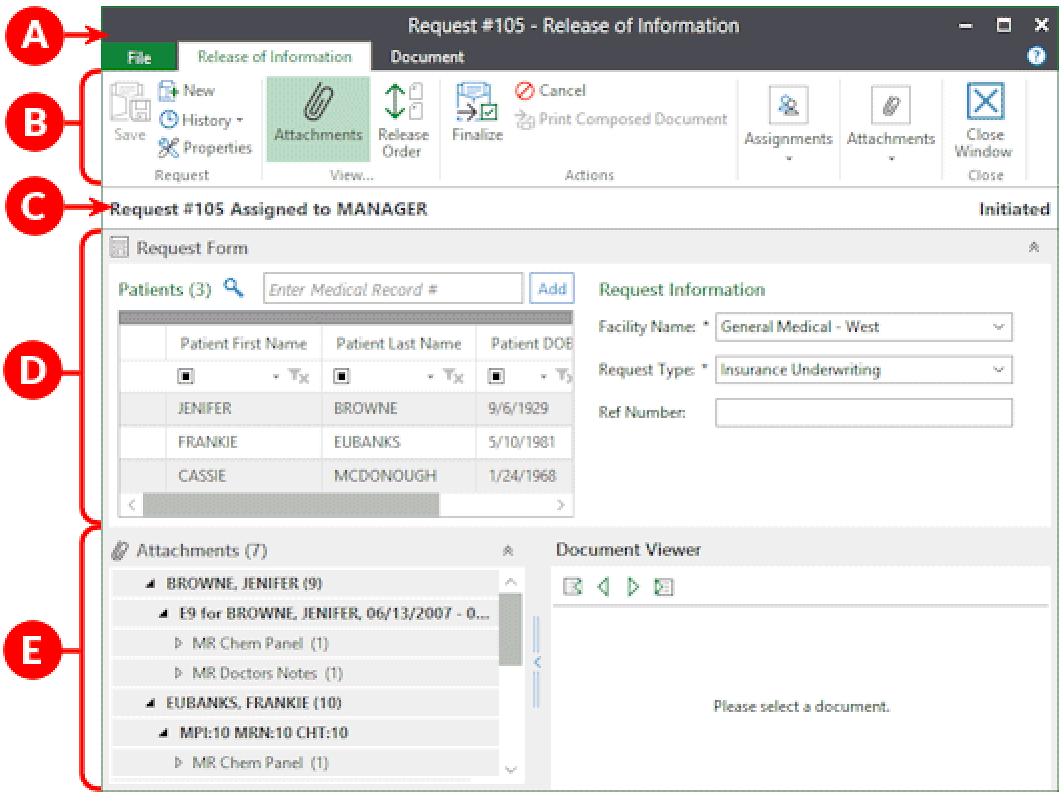
The request is displayed.

Note: A notification may be displayed if documents that are attached to the request were deleted from the system. For more information, see Removing Deleted Documents from a Request on page 436.



Request Editor Diagram

When a request is opened or created, it is displayed in the Request Editor. The Request Editor is a window that allows you to view, modify, and act on a request. The following diagram illustrates what the Request Editor might look like, depending on your rights and the state of the request:



Element	Description
A	**Title Bar** - Displays the Request #. An asterisk (*) at the end of the title means there are unsaved changes on the request. If a request is disabled and cannot be modified, **[Read-Only]** is displayed after the patient name.
B	**Ribbon** - Displays available actions you can perform on the request. Available actions depend upon your privileges and the state of the request.
C	**Request Header** - Displays information about the request, including the Request #, the user the request is assigned to, and the current status of the request.
D	**Request Form** - Displays associated patients and information about the request. Depending on your rights and the status of the request, you can edit these fields.

Element	Description
D	**Attachments / Release Order Pane** - Displays either the Attachments view or the Release Order view, depending on which view is enabled in the ribbon. Both views list documents attached to the request.

Removing Deleted Documents from a Request

Upon opening a request, you may receive a prompt indicating this request contains documents that have been deleted from the system. To recover the documents, contact your system administrator. Otherwise, remove the documents from the request.

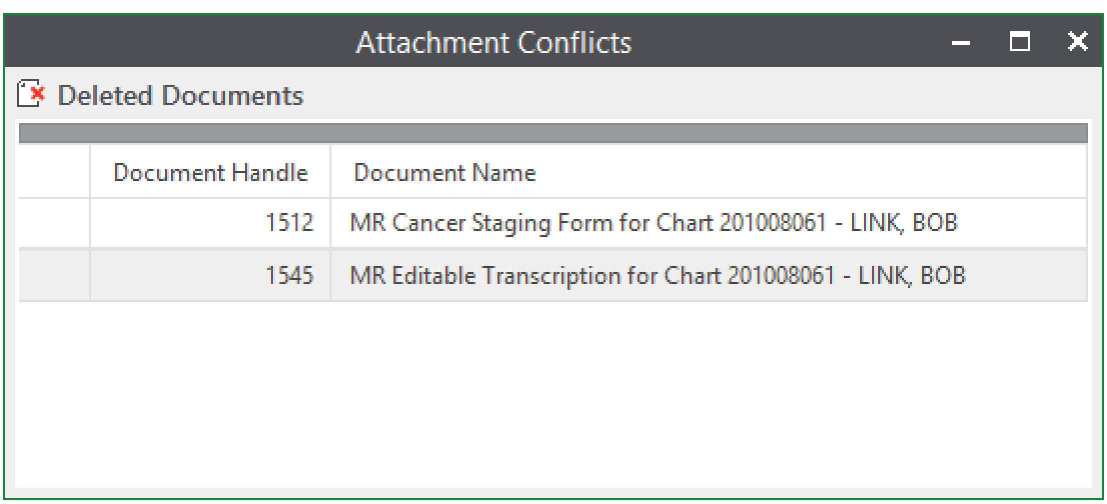
A request cannot be finalized until all deleted documents have been removed. This requirement ensures you are aware of which documents have been deleted and cannot be included in the request.

Note: Documents cannot be removed from the request if it is in a read-only state.

To remove deleted documents from the request:

1. Open the request
2. Click **OK** at the prompt.
3. Click the **Deleted Document(s)** button in the request header.

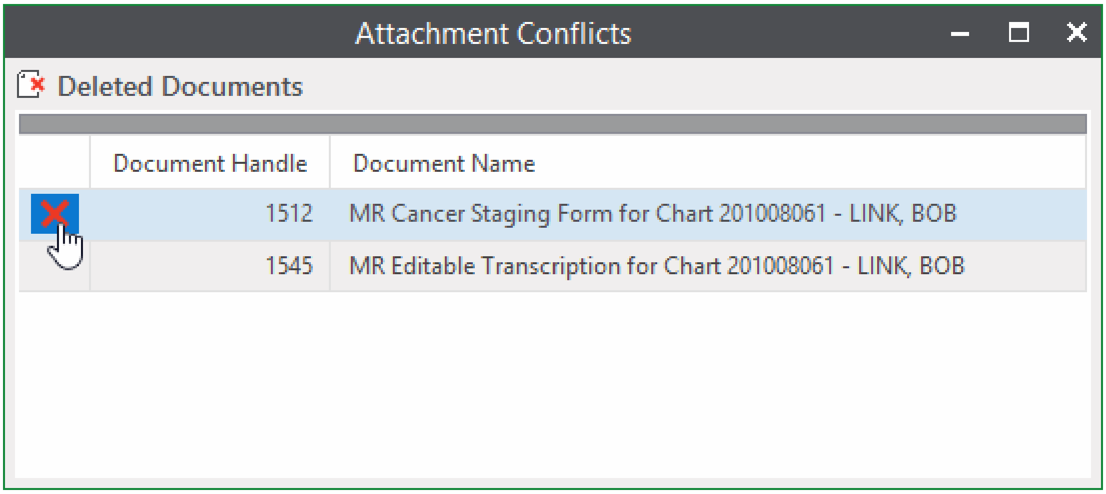
The **Attachment Conflicts** dialog box is displayed.



4. Rest the mouse pointer over an item you want to remove from the request.

Note: If the document name is not available, the document has been permanently purged from the system. For more information, contact your system administrator.

5. Click the **X** on the left side of the list.



6. Repeat the process as necessary.
7. When finished, save your changes to remove the documents from the request.

Note: For more information on saving a request, see Saving a Request on page 452.

Managing Locks

When a request is open by a user, the request is locked. When a request is locked, only the user viewing the request can modify it.

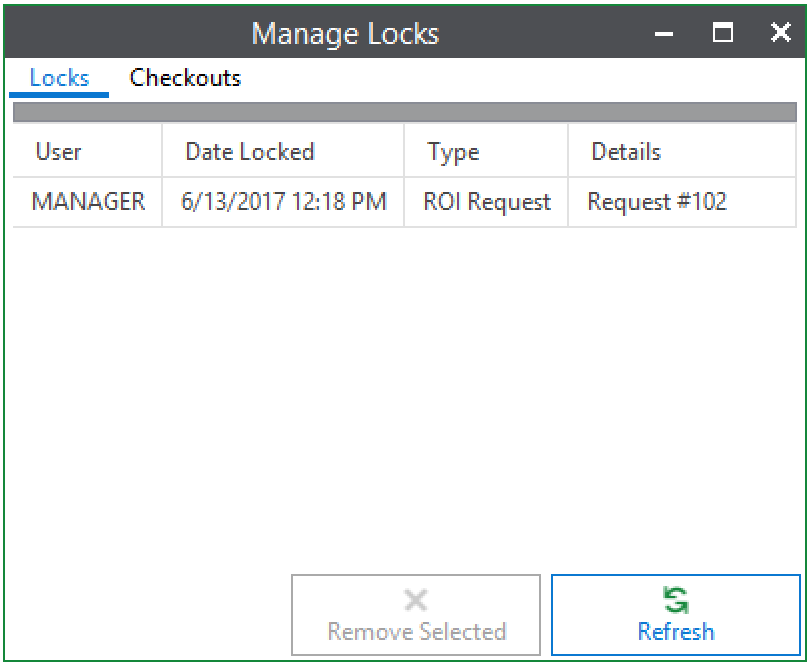
If a user opens a request that is assigned to another user, then neither user can modify the request until the lock is removed. A user cannot work on a request assigned to a different user, and the user assigned to the request cannot work on the request until the lock is removed.

A lock is removed when the request is closed, when the user who creates the lock logs out, or when the lock is manually removed. For example, if the Medical Records Unity Client shuts down unexpectedly, you may need to manually remove the lock.

To remove a request lock manually:

1. From the Medical Records Unity Client, click the **File** menu.
2. Select **Manage Locks**.

   The **Manage Locks** dialog box is displayed. From here, you can view information regarding each locked request, including the user who locked the request, the date the request was locked, and the Request #.



3. Select one or more locks you'd like to remove.

   Release of Information requests use the **ROI Request** lock type, which is displayed in the **Type** column. The Request # is located in the **Details** column.
4. Click **Remove Selected**. The selected locks are removed.

Creating an ROI Request

From the Medical Records Unity Client, an ROI request can be created from selected charts or documents in the Medical Records Unity Client or from scratch within the ROI layout.

Creating a New Request Using Selected Charts or Documents

If your system is licensed for the HL7 Listener, you can create new requests from charts or documents selected in the Medical Records Unity Client.

This functionality is not available if your system does not include an HL7 Listener license. Without an HL7 license, you can only create requests within the ROI layout. For more information on creating requests within the ROI layout, see Creating a New Request from the ROI Layout on page 441.

When you create a Release of Information request from charts or documents selected in the Medical Records Unity Client, the selected charts or documents are attached to the request.

Note: You can only attach documents you have rights to view. If you attempt to attach a chart and do not have rights to view one or more documents in the chart, you are notified that some of the documents could not be attached to the request. For more information, see your system administrator.

You can create a Release of Information request from the following locations:

- Chart Search
- Combined View
- Encounters
- View Chart
- The Workflow layout (Workflow is available only if the system is licensed for Workflow. See your system administrator for more information.)

For information about these locations, see the **Medical Records Unity Client** module reference guide.

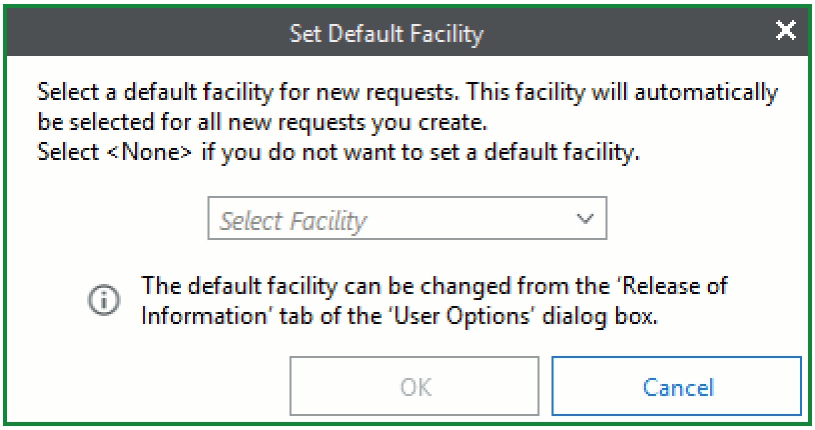
To create a request using selected charts or documents:

1. From the Medical Records Unity Client, select one or more charts or documents.
2. Click the **New Request** button on the **Chart** tab. Depending on the items selected, the multiple options may be displayed.

3. Select one of the following options:
   - **Create Request from Selected Chart(s)** - Allows you to create a new ROI request containing documents from the currently selected charts.

     If you click the **Release of Information** button from the **View Chart** window, you are instead given the option to **Create Request from Current Chart**.
   - **Create Request from Selected Document(s)** - Allows you to create a new ROI request containing documents from the currently selected documents.
4. If the **Set Default Facility** dialog box is displayed, do one of the following:
   - Select a facility from the drop-down list, and click **OK**. This facility will be automatically selected when you create new requests.
   - Select **<None>** from the drop-down list, and click **OK**. No facility will be automatically selected when you create new requests.

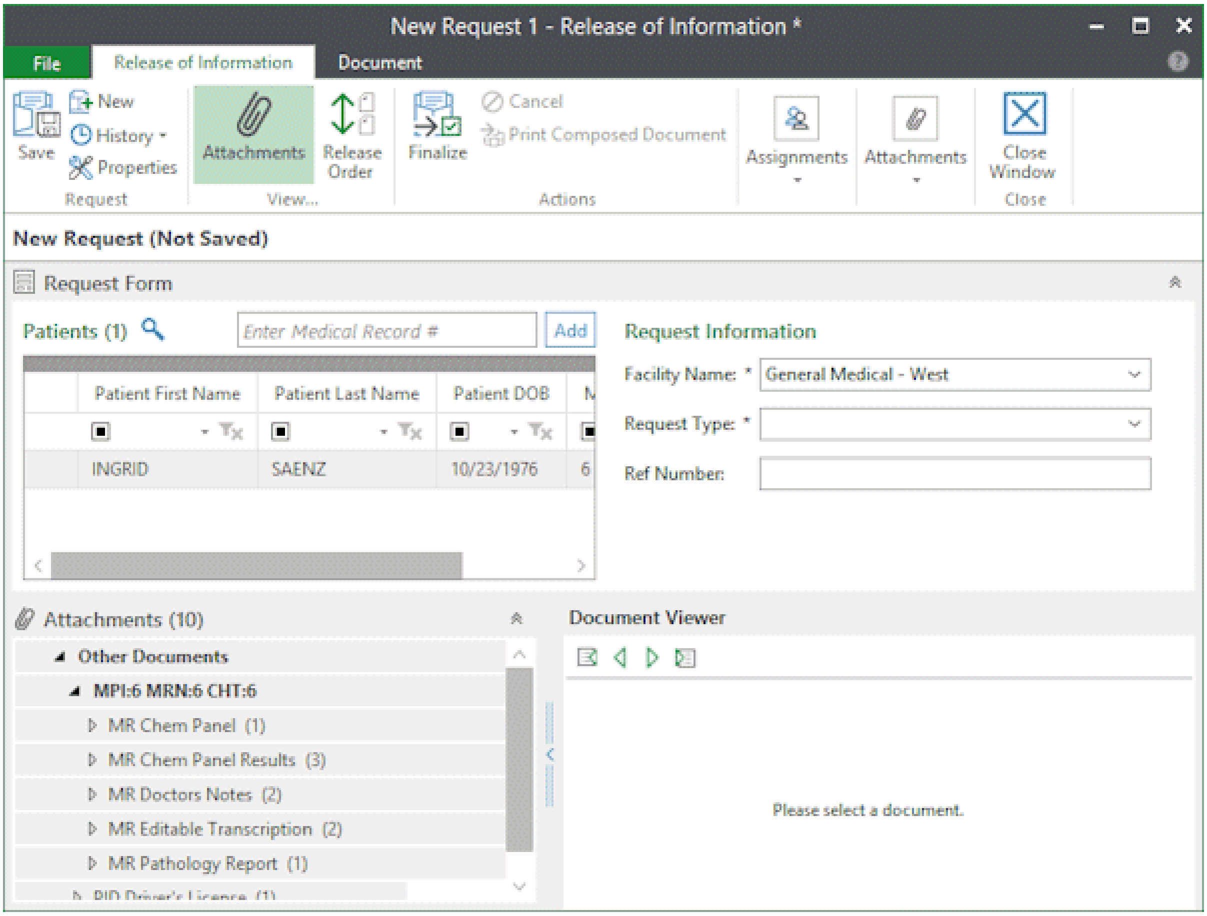
- Click **Cancel** to postpone making a selection until the next time you create a new request.



The **Set Default Facility** dialog box prompts you to specify a facility you would like selected by default for all new requests you create. The **Set Default Facility** dialog box is only displayed if you have not previously specified whether you would like to select a default facility.

Note: To change your default facility preference after selecting a facility or **<None>** and clicked **OK**, see ROI User Options on page 493.

The ROI request form is displayed, and the selected charts and/or documents are attached to the request. The associated patient is automatically populated in the **Patients** list.

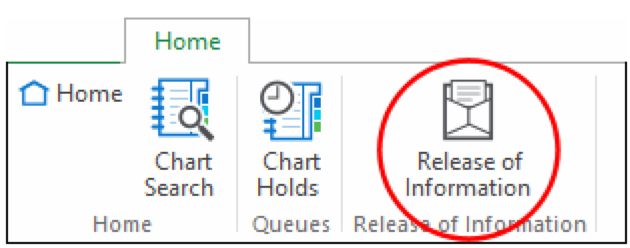


Creating a New Request from the ROI Layout

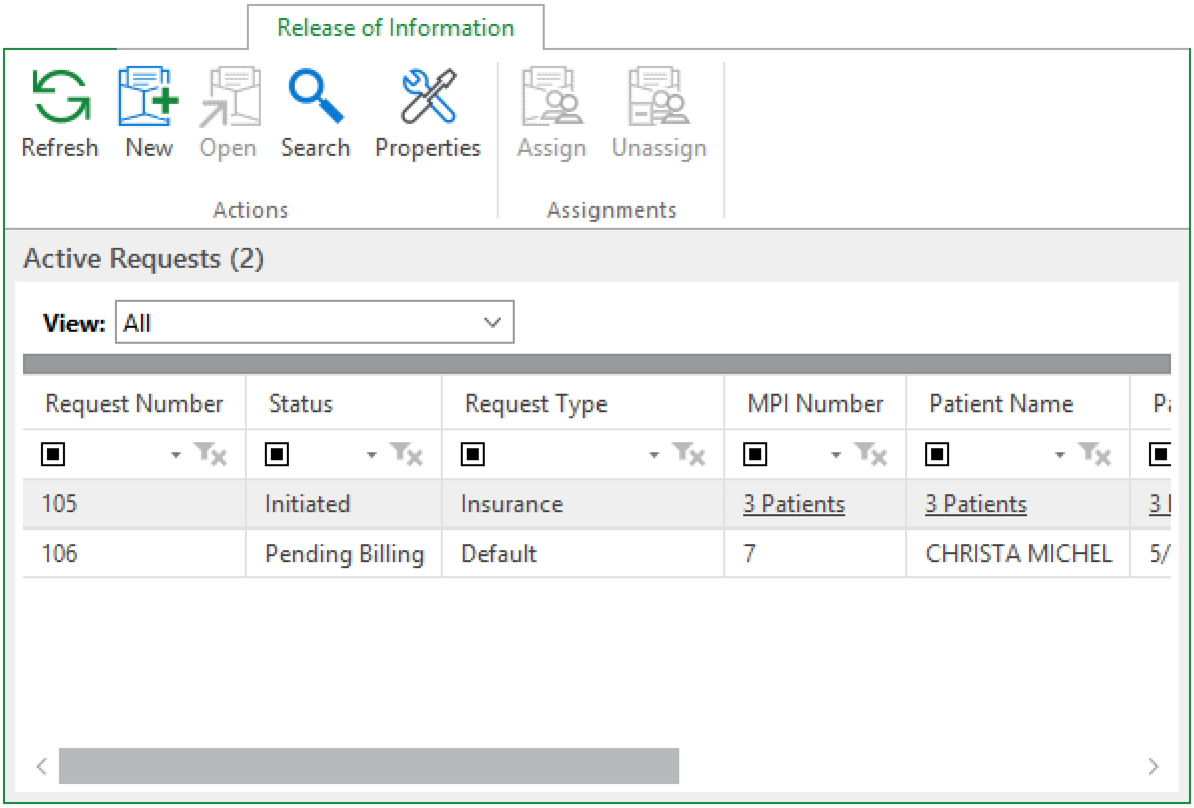
New ROI requests can be created from scratch within the Release of Information layout in the Medical Records Unity Client.

To create an ROI request from the Release of Information layout:

1. Click the **Release of Information** button on the **Home** tab.



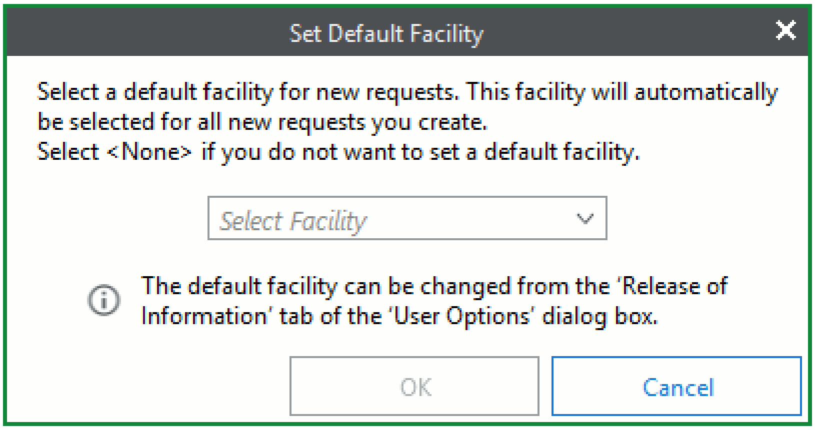
The Release of Information layout is displayed.



2. Do one of the following:
   - Click the **New** button from the **Release of Information** tab.

   - Right-click within the **Active Requests** list and select **New**.
3. If the **Set Default Facility** dialog box is displayed, do one of the following:
   - Select a facility from the drop-down list, and click **OK**. This facility will be automatically selected when you create new requests.
   - Select **<None>** from the drop-down list, and click **OK**. No facility will be automatically selected when you create new requests.

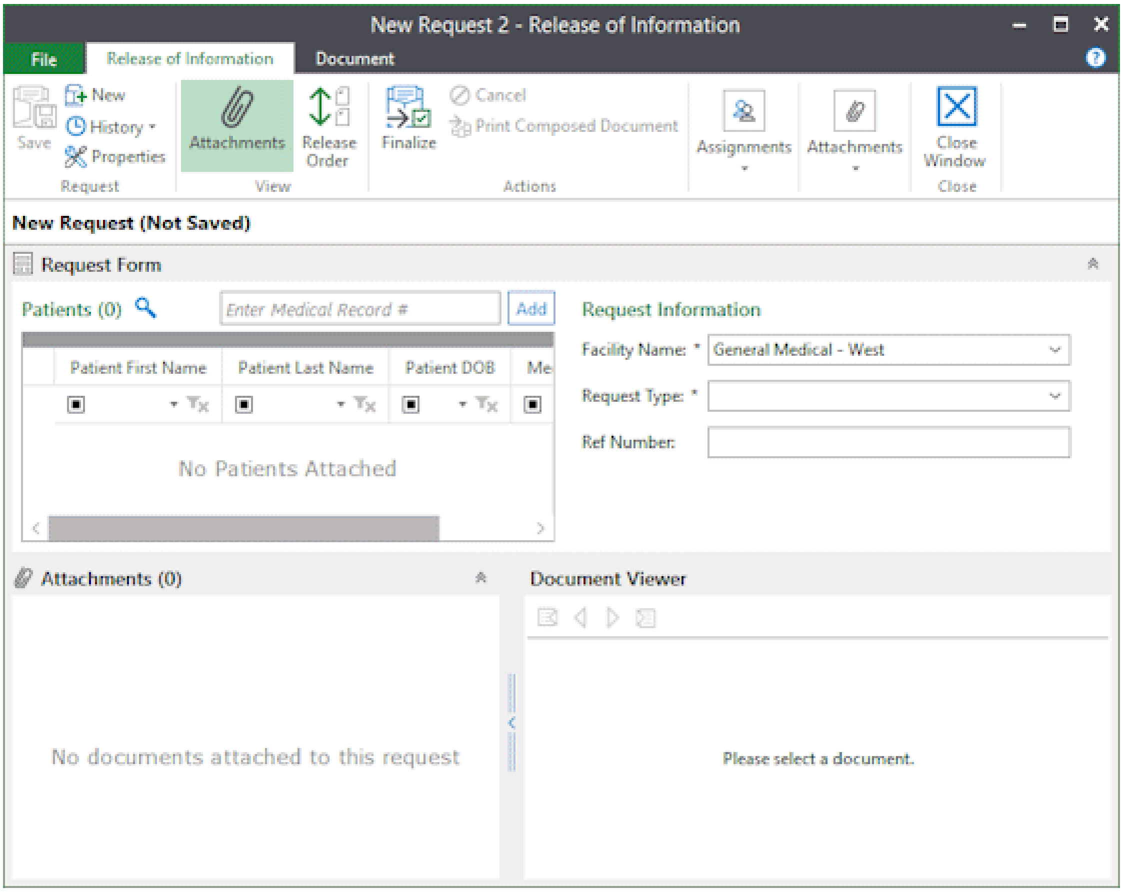
- Click **Cancel** to postpone making a selection until the next time you create a new request.



The **Set Default Facility** dialog box prompts you to specify a facility you would like selected by default for all new requests you create. The **Set Default Facility** dialog box is only displayed if you have not previously specified whether you would like to select a default facility.

Note: To change your default facility preference after selecting a facility or **<None>** and clicked **OK**, see ROI User Options on page 493.

The ROI request form is displayed.



Entering Information into the Request Form

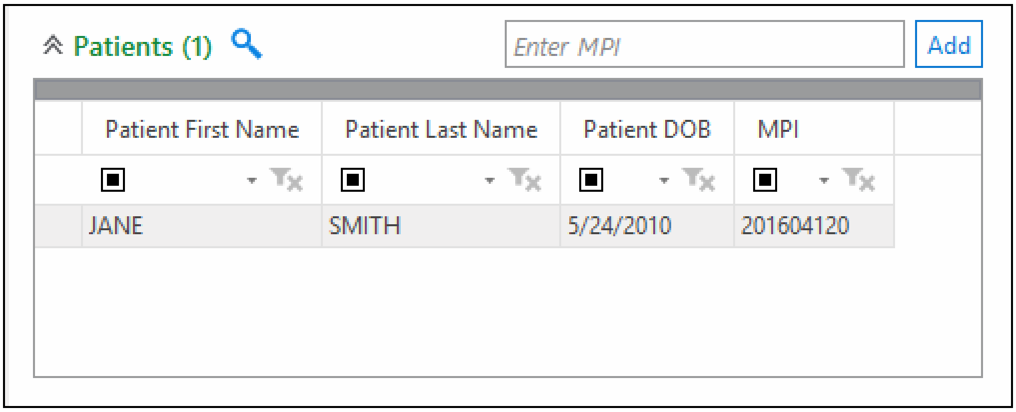
When a new request is created, the request form is displayed. The request form allows you to enter details regarding the patient whose information is being requested, the person or group requesting the information, and the way the request should be handled. You can also list external items that should be figured into the final cost of the request.

The following sections outline how to add information to the request form:

- Adding Patients to a Request on page 445
- Adding Request Information to a Request on page 451

Adding Patients to a Request

On the ROI request form, the **Patients** list displays information about the patients whose information is being requested.



Patients can be attached to an ROI request in the following ways:

- Creating the request from selected charts or documents in the Medical Records Unity Client.
- Adding specific MPIs, MRNs, or chart IDs to the request form.
- Searching for and retrieving the appropriate patient record directly from the request form.

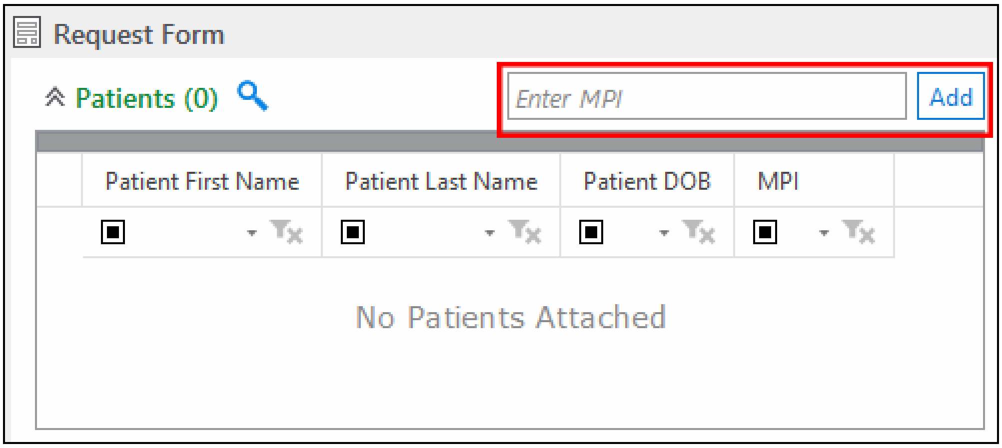
Note: If your system does not have an HL7 Listener license, you must enter patient information manually. Patients cannot be automatically attached to the request, because an HL7 Listener license is required for retrieving patient records and creating requests from existing charts and documents. Enter the MPI / MRN, patient name, and patient date of birth in the fields provided.

Adding Patients By MPI or MRN

The request form allows you to quickly add patients by either MPI or MRN, depending on your system's configuration.

To add patients by MPI or MRN:

1. In the field above the **Patients** list, do one of the following:
   - If the field says **Enter MPI**, enter the patient's MPI.
   - If the field says **Enter MRN**, enter the patient's MRN.



2. Press **Enter** or click **Add**. The patient associated with the identifier is added to the **Patients** list.
   If multiple patients are associated with the identifier, then an error is displayed, and you must use patient lookup to associate the correct patient with the request. See Searching for Patients on page 449.
3. Repeat for each patient to include in the request.

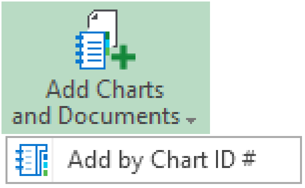
Adding Patients by Visit Number

If you do not know the patient identifier, you can add patients to a request by visit or chart ID number.

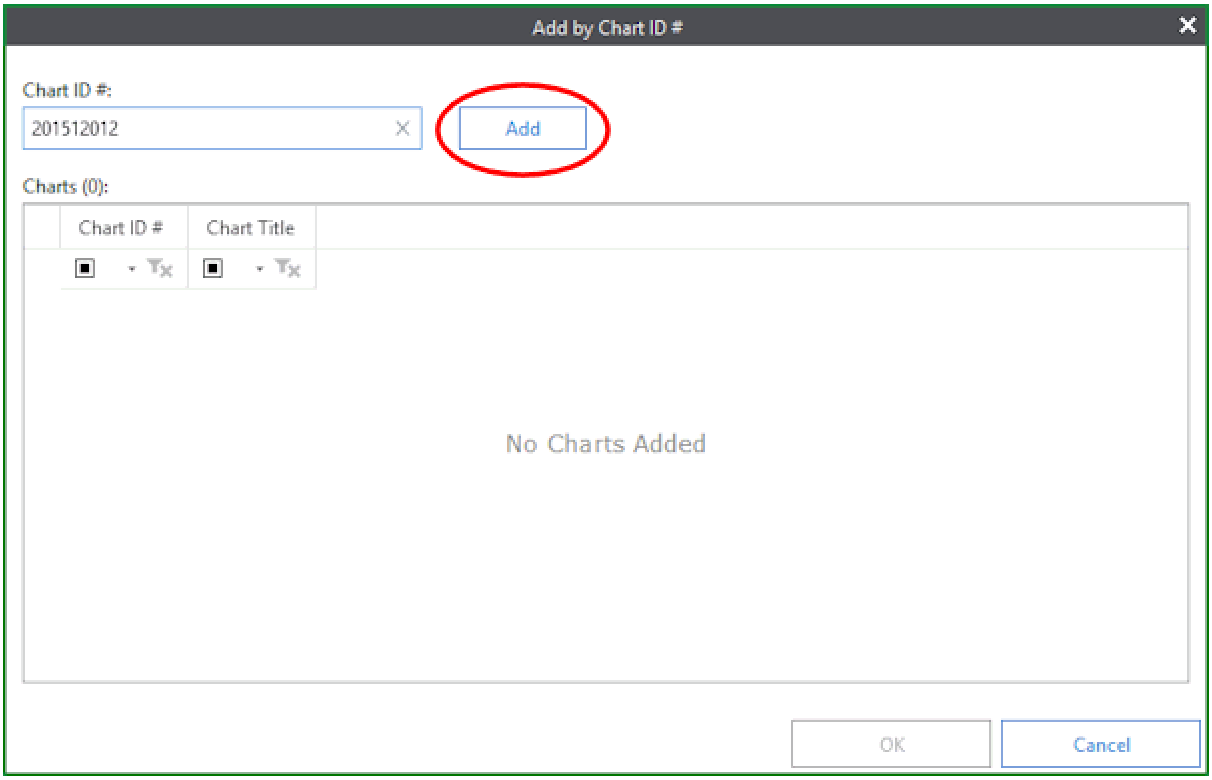
Note: In the following procedure, the term **Chart ID #** may be replaced with a label that reflects the term used within your organization. For example, labels may display the term **Visit #**, **Encounter #**, or **Account #** instead of **Chart ID #**.

To attach patients:

1. From an open request, click the lower half of the **Add Charts and Documents** button, and select **Add by Chart ID #**.

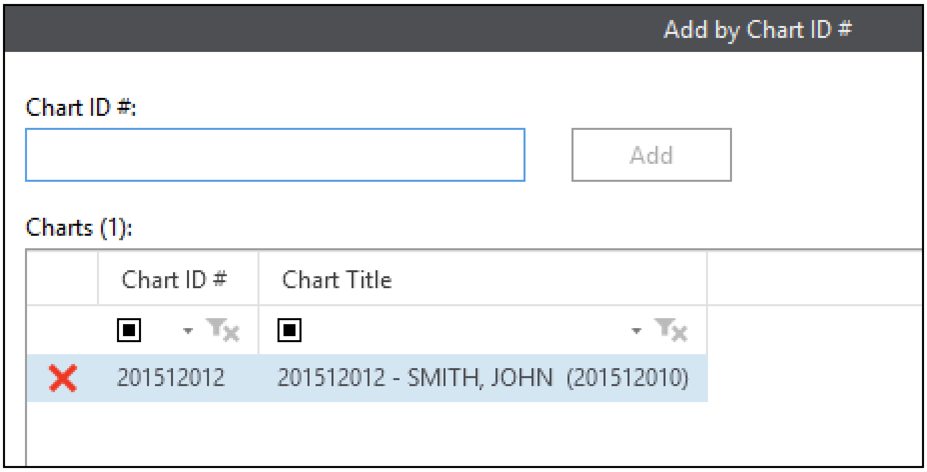


2. In the **Chart ID #** field, enter the ID number of the patient's chart.
3. Click **Add**.



If multiple charts match the identifier you entered, the **Select Chart From List** dialog box displays the matching charts. Select the chart you want to add, and then click **OK**.

4. Continue adding chart IDs as needed.
   To remove a chart ID, rest your pointer over it, and click the **X** displayed to the left of the chart.

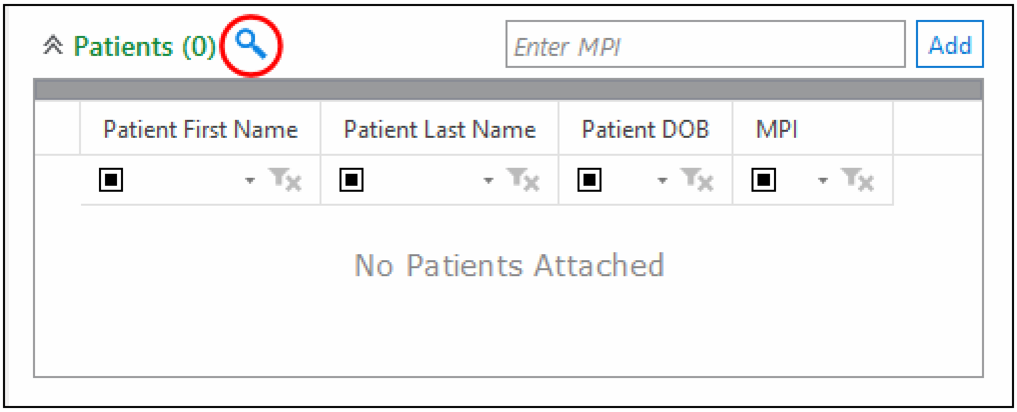


5. Click **OK** when you are done adding chart IDs.

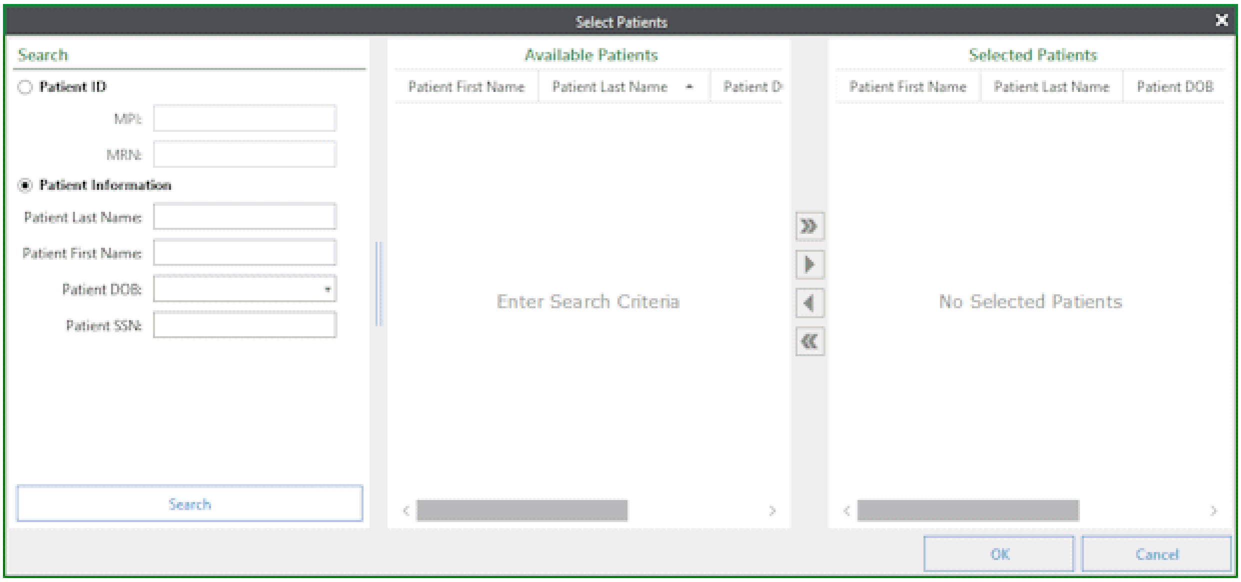
Searching for Patients

To search for and retrieve the appropriate record for the request:

1. From the request form, click the **Patient Lookup** button.

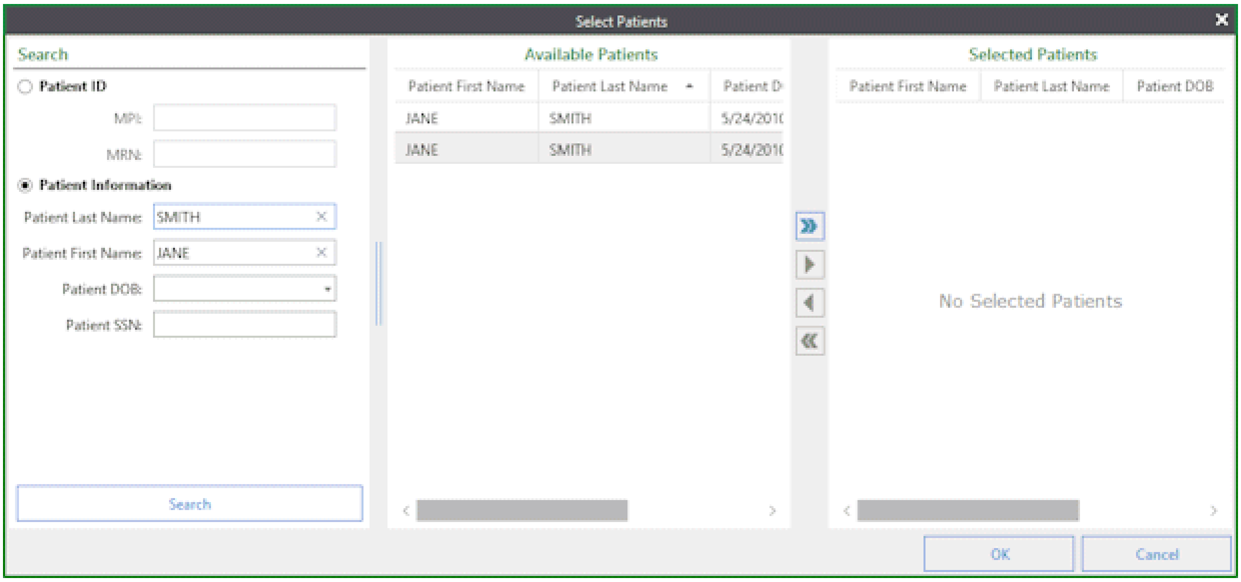


The **Select Patients** dialog box is displayed.



2. Select one of the following search options:
   - **Patient ID** - Allows you to search for patients by **MPI** and/or **MRN**, depending on your system's configuration.
   - **Patient Information** - Allows you to search for patients by name, date of birth, or Social Security Number.

3. Enter the appropriate information and click **Search**. Patient records matching the criteria are displayed in the **Available Patients** list.



4. Do one of the following:
   - To add one or more patients displayed in the **Available Patients** list, select the appropriate patient from the list and click the **Add Selected Items** button.
   - To add all available patients displayed in the **Available Patients** list, click the **Add All Items** button.
5. To search for and add additional patients, repeat the search process.
6. Verify the **Selected Patients** list is accurate.

   To remove a patient, select the patient and click the **Remove Selected Items** button.
7. Click **OK** when finished.

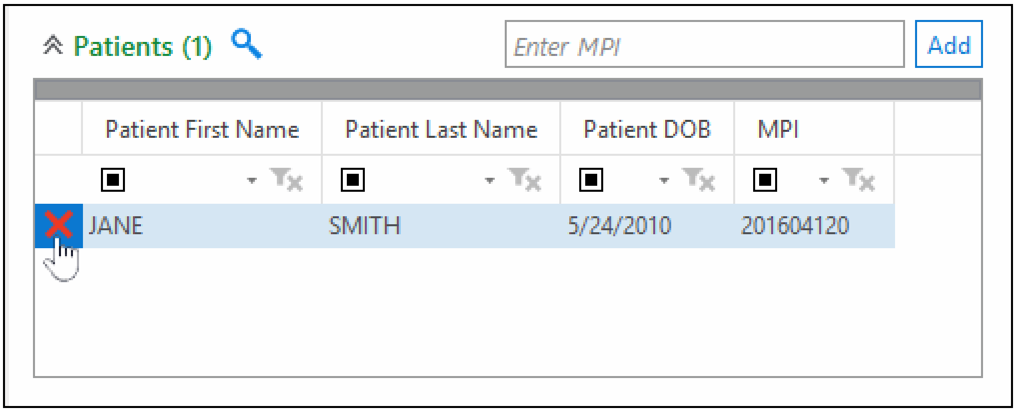
Removing Patients From a Request

If a patient has been attached to a request in error, you can detach the patient using the **Patients** list. Detaching the patient will also detach all of the patient's documents that are currently attached to the request.

To remove a patient from a request:

1. Open the ROI request form.
2. In the **Patients** list, locate the patient you want to remove from the request.

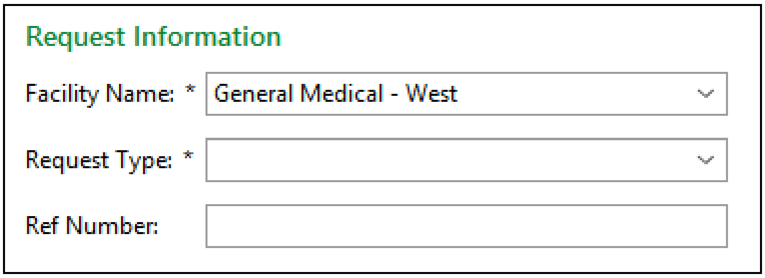
3. Rest your mouse pointer over the patient's name to display the **Remove** button in the leftmost column.



4. Click the **Remove** button.
5. If the patient has any documents attached to the request, you are prompted to confirm the removal of both the patient and associated documents.
   - Click **Yes** to confirm the removal.
   - Click **No** to cancel.

Adding Request Information to a Request

The **Request Information** section of the Request Form allows you to specify the facility, Request Type, and reference number (if applicable).



Use the following drop-down lists and fields to configure the request:

Request Information	Description
Facility	Select the facility where the requested records are located. Depending on your system's configuration, this field may be labeled differently. **Note:** Available facilities depend on your system configuration.

Request Information	Description
Request Type	Select the Request Type to associate with the request. **Note:** Available Request Types depend on the selected facility. For this reason, the **Request Type** drop-down list is disabled until you select a facility. **Note:** If you change the facility after you select a Request Type, the **Request Type** drop-down selection may be cleared if the selected Request Type is not configured for the newly selected facility. See your system administrator for more information.
Ref Number	Enter a reference number for the request, if applicable. The reference number is an external tracking number that may have been provided to you for the request.

Saving a Request

A request can be saved once the following criteria is specified on the request form:

- Facility
- Request Type

Once the above information is entered, you can save the request by clicking the **Save** button on the **Release of Information** tab.

A request is also automatically saved after you perform any of the following actions:

- Canceling the request
- Assigning or unassigning the request
- Finalizing the request

Once a request is saved, it is available from the Release of Information layout. Requests cannot be deleted after they are saved.

Attaching Charts and Documents to a Request

Charts and documents are attached to a Release of Information request one of two ways:

- During request creation (see Creating an ROI Request on page 438 for more information).
- From within the Release of Information layout.

Note: When you attach a document to a request, the most recent revision available at that time is attached. If there is another revision created after you attach the document and you would prefer the latest revision, remove previous revision attached to the request and reattach the document. The same is true for non-revisable documents. If a page is added or removed after the document is attached to the request, the change is not reflected in the attached document. The document must be removed and reattached in order for the request to reflect the changes.

If you did not create a request using selected charts or documents from the Medical Records Unity Client, or you would like to attach additional charts and documents to an existing request, you can do so within the Release of Information layout. See the following sections for more information:

- Attaching Charts and Documents Using the Wizard on page 453
- Attaching Documents Using a Custom Query on page 459
- ROI and the Virtual Print Driver on page 495
- ROI and Report Capture for Meditech on page 503

Attaching Charts and Documents Using the Wizard

Note: This functionality is not available if you do not have an HL7 Listener license. If you do not have an HL7 Listener license, documents can only be added to requests using Custom Queries or the Virtual Print Driver. For more information, see Attaching Documents Using a Custom Query on page 459 and ROI and the Virtual Print Driver on page 495.

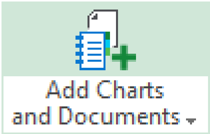
The process below describes how to add charts and documents to a request using the **Add Attachments** wizard. This process can also be used to update an existing attachments list.

When using the wizard to update the attachments list of a request, be aware of the following:

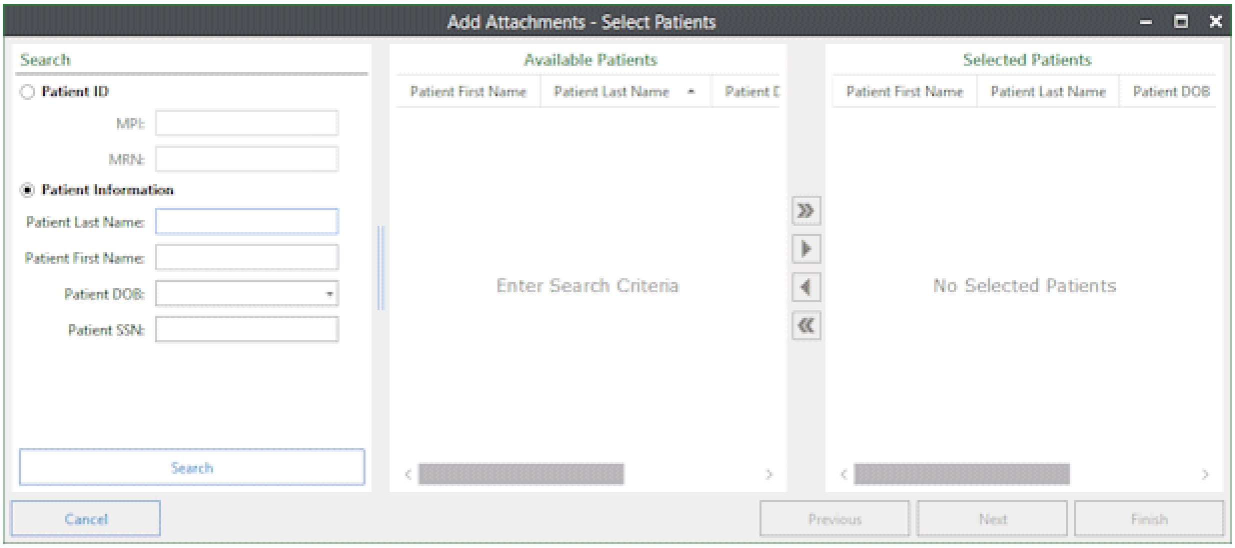
- Removing previously selected Document Types removes documents belonging to those Document Types from the request.
- If a newer revision of an attached document is available, the attachment process replaces the previous revision with the new revision.

To attach charts and documents to a request:

1. From an open request, click the upper half of the **Add Charts and Documents** button.



The **Add Attachments - Select Patients** dialog box is displayed.

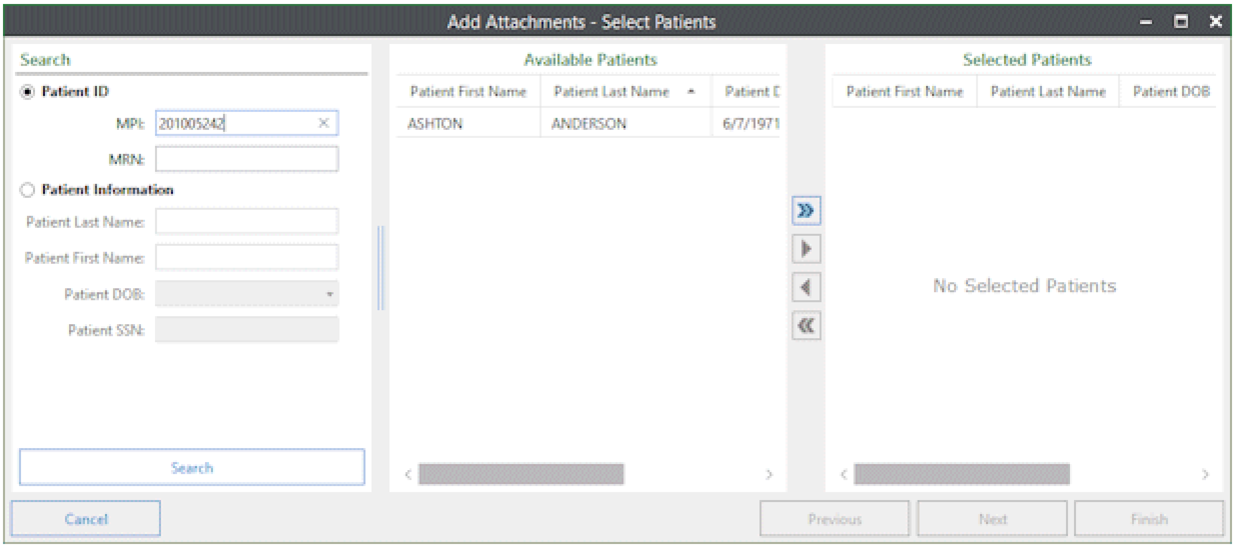


2. If patients are already selected, verify the **Selected Patients** list is accurate. To add more patients, continue to the next step. Otherwise, skip to step 6.
3. To search for patients, select one of the following options:
   - **Patient ID** - allows you to enter the patient's **MPI** and/or **MRN**, depending upon your system's configuration.
   - **Patient Information** - allows you to enter the patient's **First Name**, **Last Name**, **Date of Birth**, and/or **SSN** (Social Security Number).

Note: Depending on your system's configuration, the fields and display columns in the **Add Attachments - Select Patients** dialog may be labeled differently from what is displayed in the screen shot above.

4. Enter the appropriate information and click **Search**.

   Patient records matching the criteria are displayed in the **Available Patients** list. These records identify the patient whose information you are releasing.

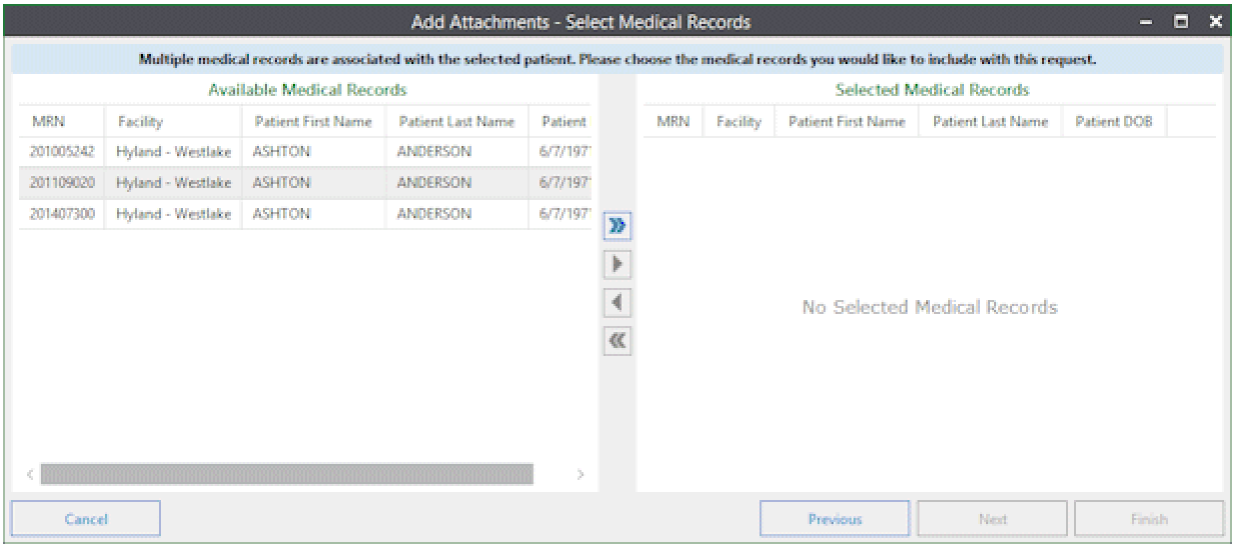


Note: If **(Multiple)** appears in the MRN column, there are multiple MRNs associated with the retrieved record. Rest your pointer over **(Multiple)** to display all the MRNs associated with the record.

5. Do one of the following:
   - To add all available patient names displayed in the **Available Patients** list, click the **Add All Items** button.
   - To add one or more patient names displayed in the **Available Patients** list, select the appropriate patient from the list and click the **Add Selected Items** button.

   The patients you added are displayed in the **Selected Patients** list. To remove all patients from this list, click the **Remove All Items** button to remove all patients. To remove one or more patients, select the appropriate patients and click **Remove Selected Items** button.

6. Click **Next**. If multiple medical records are associated with the selected patients, the **Add Attachments - Select Medical Records** dialog box is displayed.

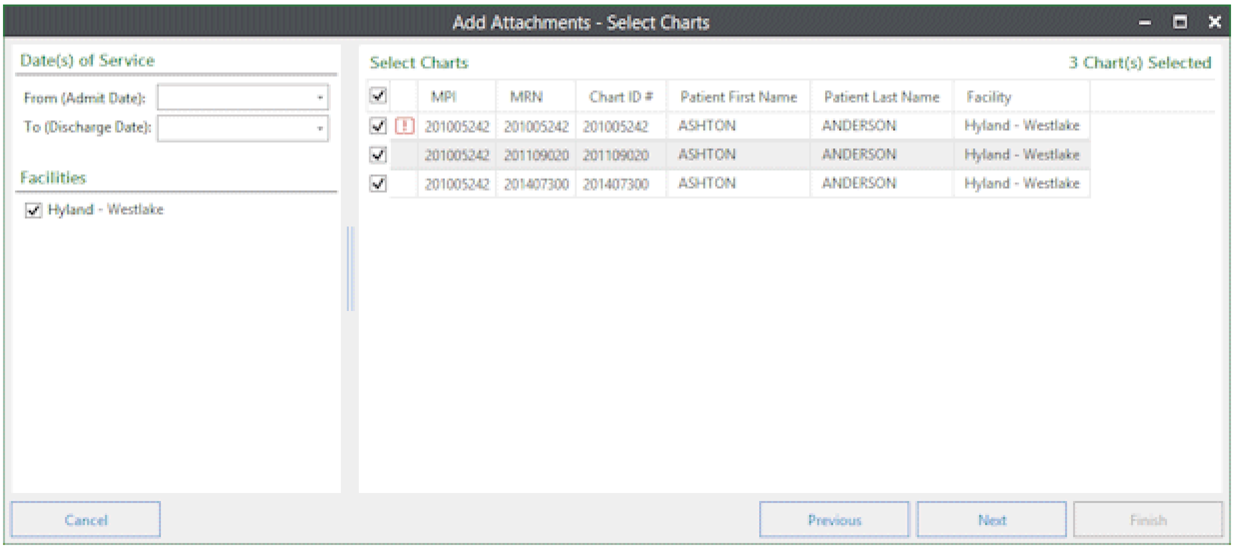


7. Select the appropriate medical records by doing one of the following:
   - To add all available medical records displayed in the **Available Patients** list, click the **Add All Items** button.
   - To add one or more medical records displayed in the **Available Patients** list, select the appropriate records from the list and click the **Add Selected Items** button.

   The medical records you added are displayed in the **Selected Patients** list. To remove all medical records displayed in this list, click the **Remove All Items** button to remove all records. To remove one or more records, select the appropriate records and click **Remove Selected Items** button.

8. Click **Next**. The **Add Attachments - Select Charts** dialog box is displayed. The **Select Charts** list displays and selects the charts belonging to the patients you selected in the previous step. If a patient does not have any charts, no charts are selected.

   Charts with unresolved deficiencies are listed in red with an exclamation point icon beside them.



Note: If you have previously added other charts to the request, only those charts are selected. For example, if you go through the wizard and select two charts from **Sam Brooks**, and then go through the wizard again and add **April Adams** to the **Selected Patients** list, charts from **April Adams** are displayed but not selected in the **Select Charts** list.

Tip: A deficiency indicates the chart is incomplete in some way. Before selecting and releasing a chart with deficiencies, you should see if the deficiencies can be resolved. For more information on deficiencies, see the Medical Records Unity Client documentation.

9. To filter available charts by date range, enter or select dates in the **Date(s) of Service** fields. Charts are automatically filtered from the list after you enter or select a date in either the **From (Admit Date)** field or **To (Discharge Date)** field.
   - The **From (Admit Date)** field searches dates the patient was admitted.
   - The **To (Discharge Date)** field searches dates the patient was discharged
10. To select from charts associated with specific facilities, select the appropriate facilities from the **Facilities** list. Available facilities are based on the available charts in the **Select Charts** list prior to filtering.

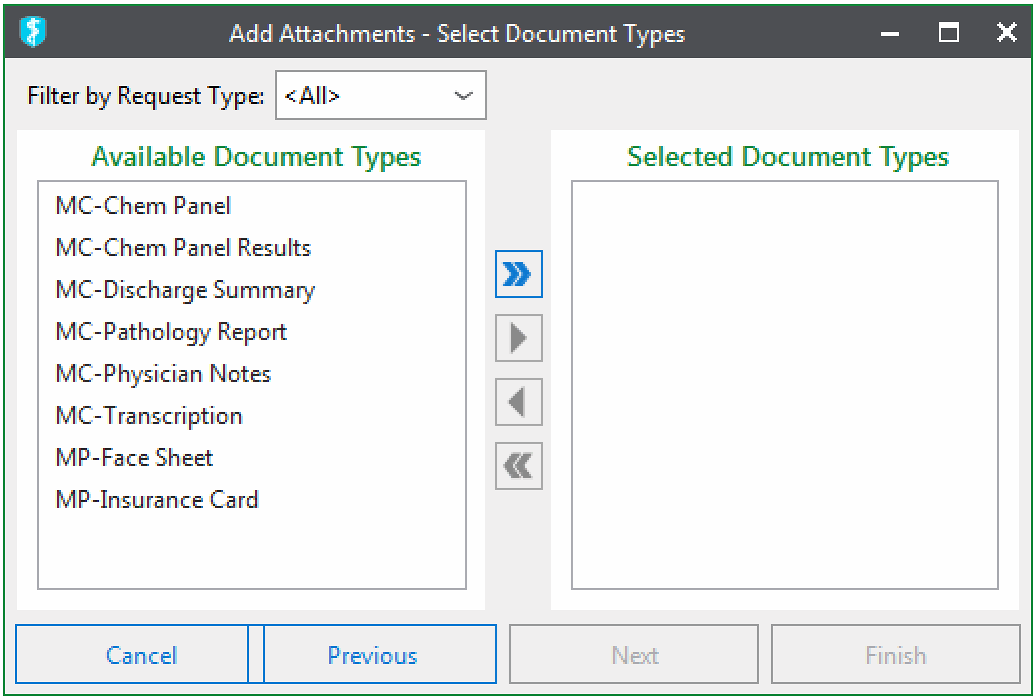
11. Select the appropriate charts from the list if they are not already selected. To select all charts displayed in the **Select Charts** list, click the check box in the column header, located in the upper-left corner of the list.

Note: Clicking the check box in the column header only selects charts displayed in the **Select Charts** list. If you have filtered charts out of the **Select Charts** list, those charts cannot be selected.

To deselect already selected charts, click the check box for the appropriate chart, or deselect the check box in the column header to deselect all charts.

Note: A chart does not need to be selected to only attach documents to the request.

12. Click **Next**. The **Add Attachments - Select Document Types** screen is displayed.



Note: Depending on your system settings, the Document Types list may be filtered to only display Document Types associated with the selected charts.

13. Filter the list of available Document Types by Request Type by selecting the **Filter by Request Type** drop-down list.

14. Add the Document Types you want to include on the request by doing one of the following:
    - To add all available Document Types displayed in the **Available Document Types** list, click the **Add All Items** button.
    - To add only Document Types displayed in the **Available Document Types** list, select the appropriate Document Types from the list and click the **Add Selected Items** button.

Note: If a Request Type has been selected for the request, its corresponding Document Types are automatically selected and displayed in the **Selected Document Types** list.

The Document Types you added are displayed in the **Selected Document Types** list. To remove all Document Types displayed in this list, click the **Remove All Items** button. To remove one or more Document Types, select the appropriate Document Types and click **Remove Selected Items** button.

15. Click **Finish**. The appropriate documents are attached to the request. This process may take a while if you are attaching a large number of documents.

Note: If a newer revision of an attached document is available, the attachment process replaces the previous revision with the new revision. When this occurs, any page exclusions applied to the document are cleared. If the system notifies you that this occurred, it is recommended that you review the affected document to evaluate whether any pages should be excluded again. For more information on excluding pages of a document, see the section on excluding pages from release.

Note: You can only view and attach documents you have rights to view. See your system administrator for more information.

Note: If your system is licensed for Report Capture for Meditech and you have attached Document Types containing external system documents, the external documents must be retrieved. Depending on your settings, this may process may begin automatically upon closing the request, or you may need to manually select to retrieve the documents. For more information on retrieving external documents, see ROI and Report Capture for Meditech on page 503.

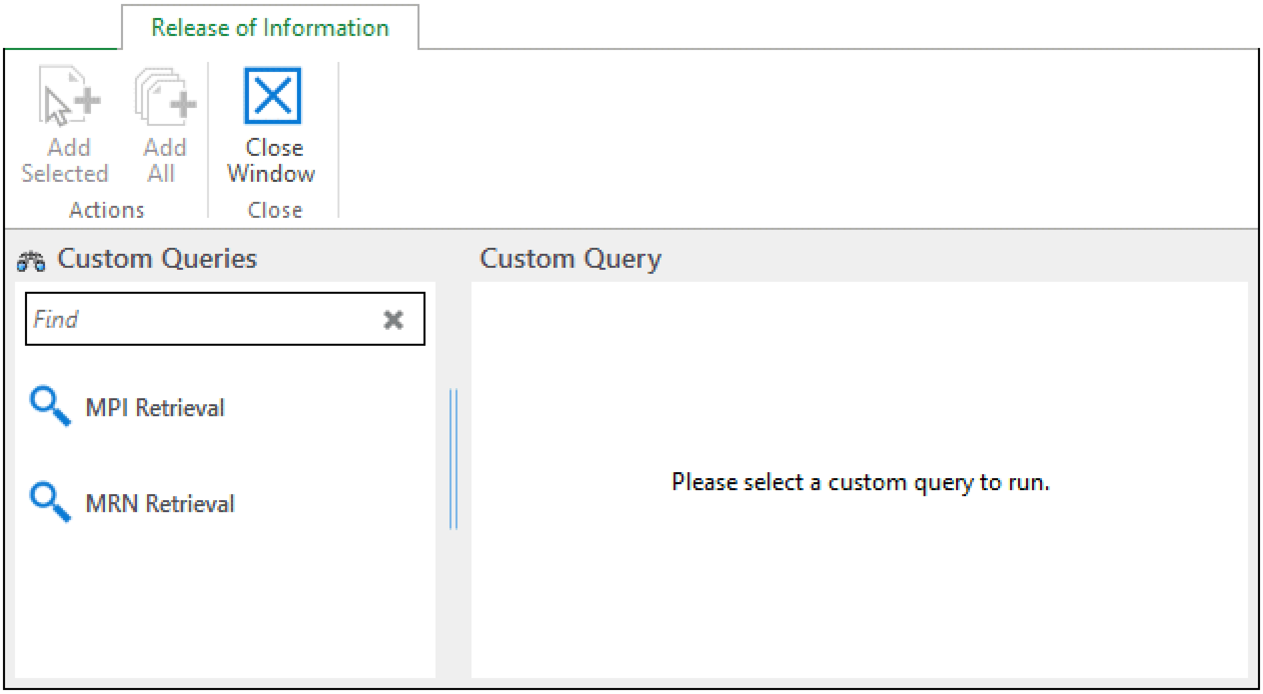
Attaching Documents Using a Custom Query

Documents can be attached to a request using available Custom Queries. Custom Queries are predefined sets of search criteria that allow you to quickly access documents. They are configured by your system administrator.

To attach a document to a request using a Custom Query:

1. From an open request, click the **Add From Custom Query** button from the **Release of Information** tab.

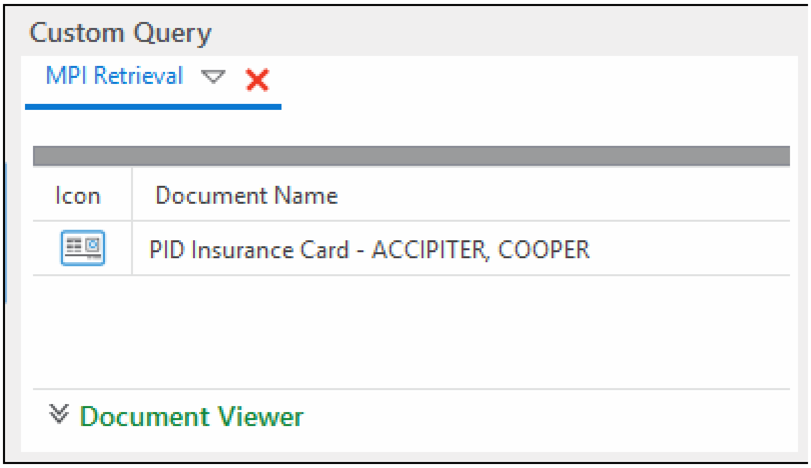
   The **Add From Custom Query** dialog box is displayed.



2. Do one of the following:
   - Select a Custom Query from the **Custom Queries** list.
   - Search for a Custom Query by entering the name of it in the **Find** field. The list of available Custom Queries is updated as you type. Select the appropriate Custom Query.

   The Custom Query form is displayed. Forms differ depending on how they were configured.
3. Complete the form as necessary according to the instructions (if applicable) and available fields, and click the **Search** button.

4. Documents that meet the search criteria are displayed, along with the name of the Custom Query.



Your system may be configured to automatically display one of the selected documents in the Document Viewer.

Depending on a Custom Query's configuration, documents that meet the search criteria may be automatically grouped by one of the display columns.

Note: If a Keyword Type that is used as a display column has more than one value for a document, the document is listed for each Keyword Value.

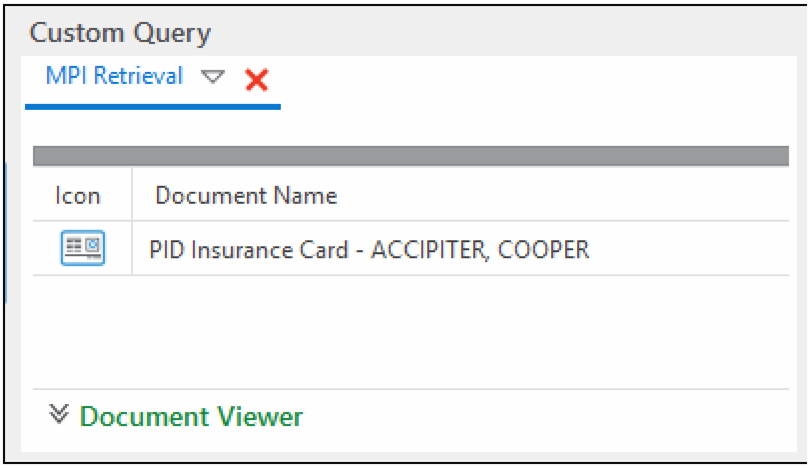
5. To add documents to a request from the displayed Custom Query, do one of the following:
   - Select one or more of the documents as needed. Click the **Add Selected** button from the **Release of Information** tab.
   - Click the **Add All** button from the **Release of Information** tab to add all documents in the results list to the request.

   You are notified the list of attached documents was updated successfully. When you are finished, click the **Close Window** button to exit and return to the request.

Note: The **Add Selected** and **Add All** buttons only apply to the currently displayed Custom Query results list.

Viewing Documents Within the Custom Queries Interface

Before attaching documents to a request from the **Add From Custom Query** dialog box, you can view documents in the results list.



To view a document returned from a Custom Query, do one of the following:

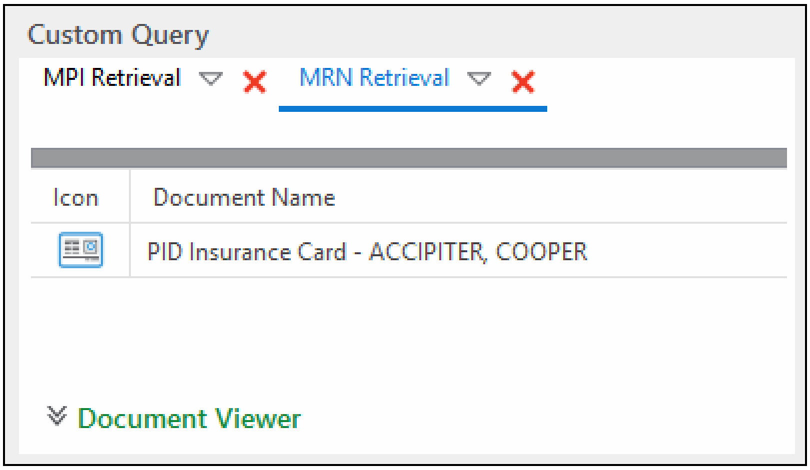
- Select the appropriate document and expand the Document Viewer to display the document.
- Double-click the appropriate document to open it in a new viewer.

When you are viewing a document, you can add and edit notes on the documents using the **Document** tab, as well as access options associated with the file format of the document (e.g., the **Text** or **Image** tab may become available).

Note: For more information on viewing documents, using the **Document** tab, and working with notes, see the Medical Records Unity Client documentation.

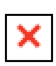
Navigating the Custom Queries Interface

When conducting multiple Custom Queries, results for each Custom Query are retained on their respective tabs.

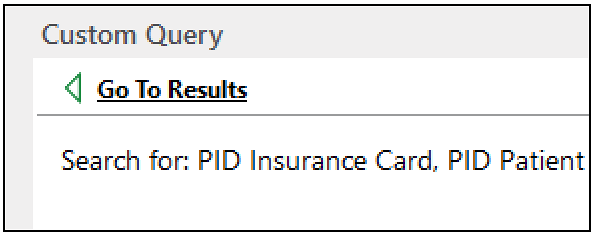


Note: Results are retained until you close the **Add From Custom Query** dialog box.

Each tab contains the following buttons:

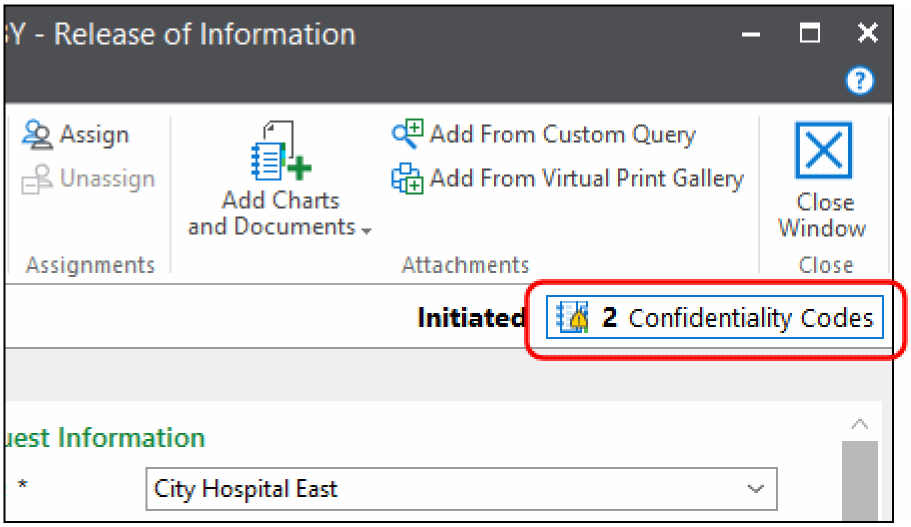
Button	Description
	Click to access the **Refresh** button and refresh Custom Query results.
	Click to close the Custom Query results. The displayed results are no longer available.

If you select a Custom Query from the **Custom Queries** list, you can return to the results lists by clicking **Go To Results** in the **Custom Query** pane.

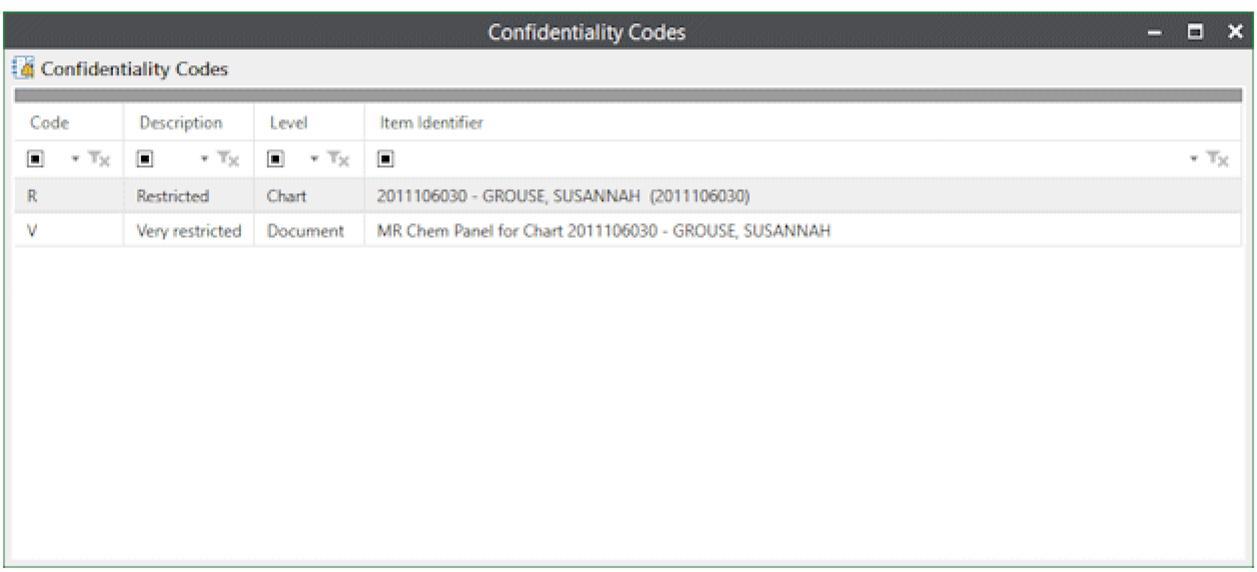


Viewing Confidentiality Codes

Confidentiality codes can be used to classify patients, charts, and documents as confidential. In the Medical Records Unity Client, ROI requests may display a confidentiality code notifier indicating that there are confidential items attached to the request.



Click the notifier to view information about confidential attachments.



Information is displayed in the following columns:

Column	Description
Code	The HL7 code for the confidentiality code.
Description	The description of the confidentiality code as configured in OnBase.
Level	The level at which the confidentiality code is applied. Possible values are: • **Patient**—The code is applied to the entire patient record. • **Chart**—The code is applied to a specific chart. • **Document**—The code is applied to a specific document.
Item Identifier	The name or ID number for the confidential item. • For patient-level codes, this column provides the patient's MPI number. • For chart-level codes, this column provides the chart's title. • For document-level codes, this column provides the document's auto-name.

Removing Confidential Attachments

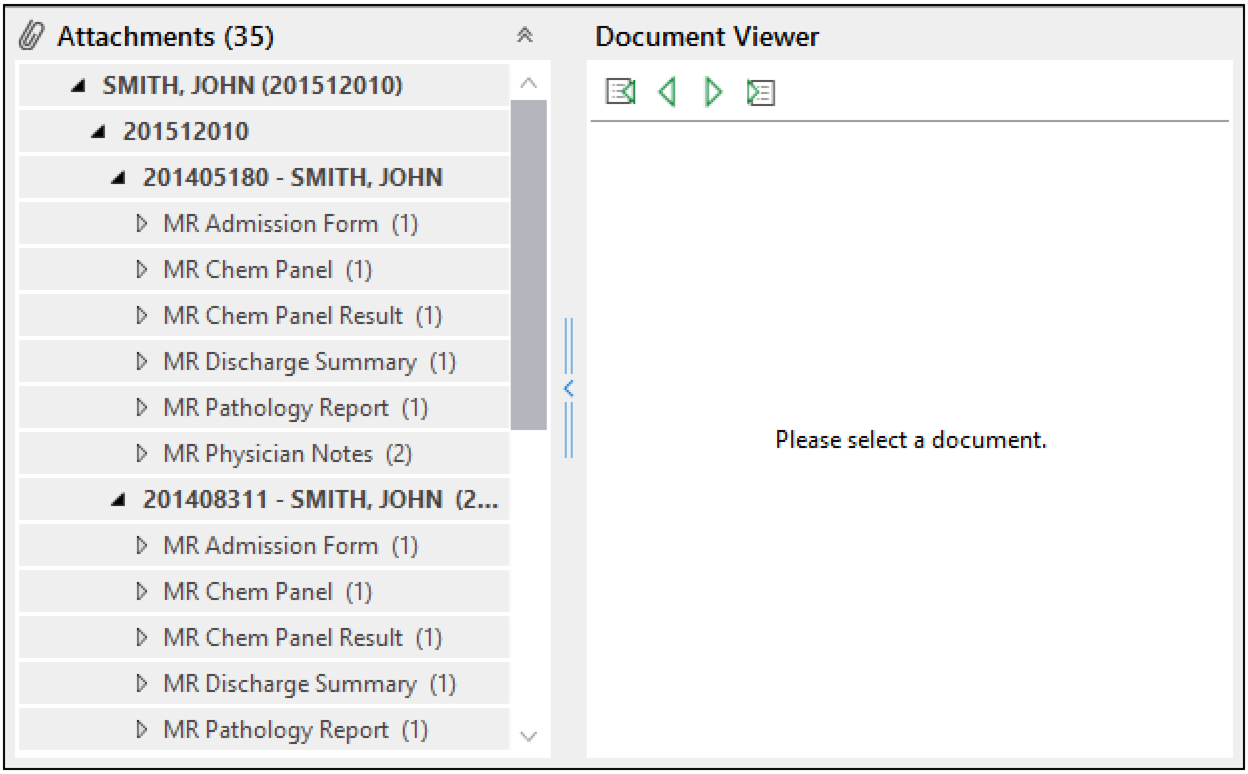
If you need to remove an attached patient, chart, or document as a result of a confidentiality code, see Removing Attached Documents on page 472.

Managing Existing Attachments

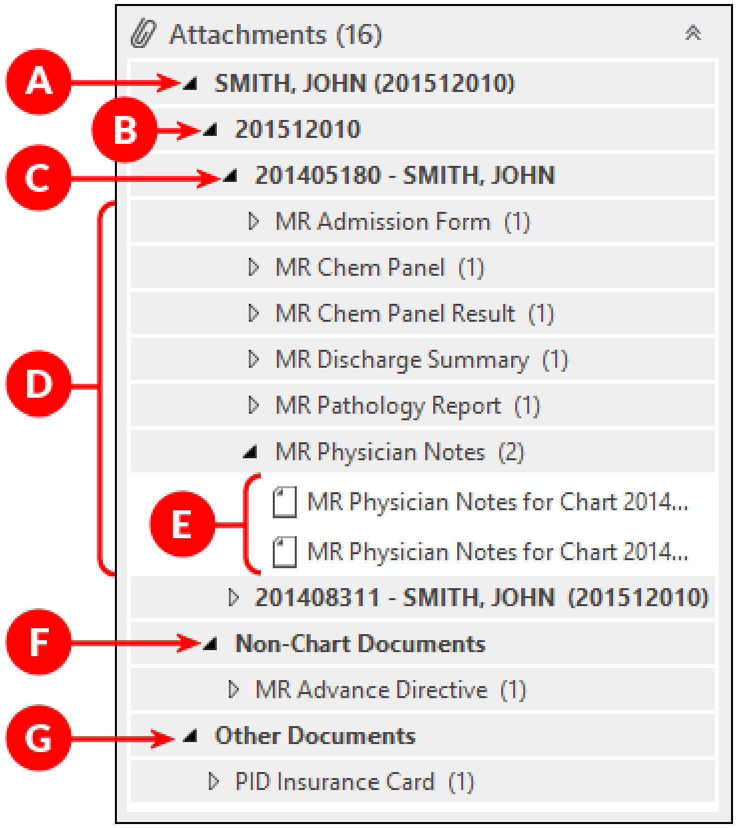
After attaching charts and documents to a request, depending on your rights, you can view documents and remove any unnecessary attachments.

To view a list of existing attachments on a request, from an open request, click the **Attachments** button from the **Release of Information** tab.

The **Attachments** list is displayed.



The following diagram provides more information on the **Attachments** list. For this example, MPI is the system patient ID method.



Element	Description
A	The patient name and MPI number. In a system where MRN is the patient ID method, the MRN is displayed instead.
B	The patient MRN number. In a system where MRN is the patient ID method, this level is not displayed.
C	The patient chart.
D	The attached Document Types. Document Types are listed for each chart, for the **Non-Chart Documents** level, and for the **Other Documents** level. The number displayed after the Document Type indicates how many documents of that Document Type have been attached for that chart or document level.
E	The names of attached documents, which are displayed when a Document Type is expanded.

Element	Description
F	The **Non-Chart Documents** level, which includes patient-level documents. These are medical record documents not associated with any chart. For more information on clinical patient documents, see the Medical Records Unity Client documentation.
G	The **Other Documents** level, which can include non-medical record documents. These non-medical documents are not associated with any chart or patient.

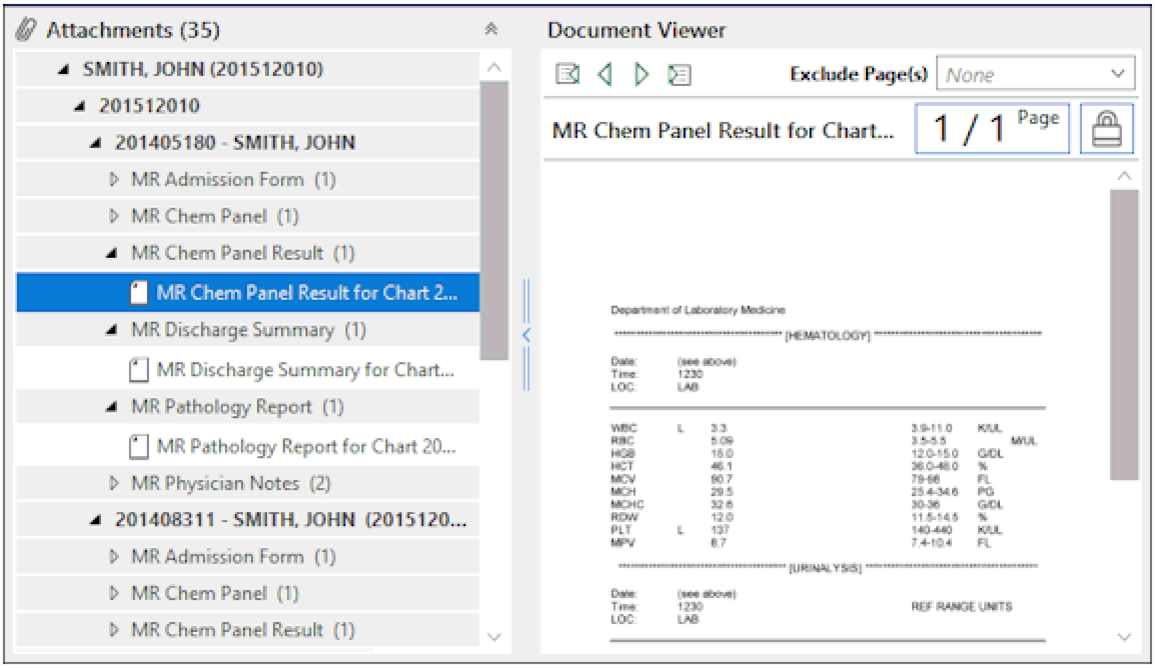
Viewing and Navigating Attachments

You can view and quickly navigate contents of documents listed in the **Attachments** list.

To view documents from the **Attachments** list, click the appropriate Document Type to display its documents. To expand all items in the list, collapse all items in the list, or restore the list to the default view, right-click within the list, and select one of the following options:

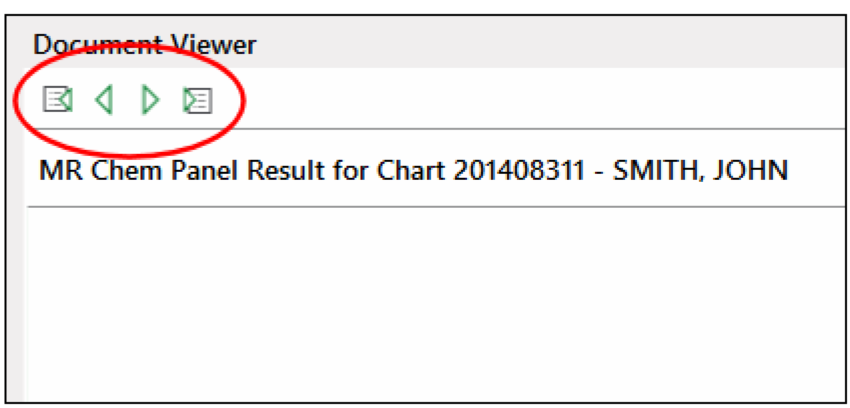
Option	Description
Collapse All	Collapses all items in the **Attachments** list, so that only the top-level items are displayed.
Expand All	Expands all items in the **Attachments** list, so that all MPIs / MRNs, charts, Document Types, and documents are displayed.
Reset to Default	Resets the **Attachments** list to the default view.

Select a document to view it in the **Document Viewer** pane or in an external viewer, depending on the type of document you are viewing.



Once you have selected a document, you can add and edit notes on the documents using the **Document** ribbon tab. For information on using the document viewer and working with notes, see the Medical Records Unity Client documentation.

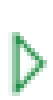
To quickly navigate to pages of a selected document or to previous and next documents in the list, use the buttons located at the top of the document viewer. You can also use the **Up** and **Down** arrow keys to quickly navigate to and view documents in the **Attachments** list.



Document list navigation buttons and their keyboard shortcuts are described in the following table:

Button	Description	Keyboard Shortcut
	**Previous Document** displays the previous document in the attachments list. If the first document in the list is selected, clicking **Previous Document** displays the last document in the attachments list.	CTRL+SHIFT+PAGE UP
	**Next Document** displays the next document in the attachments list. If the last document in the list is selected, clicking **Next Document** displays the first document in the list.	CTRL+SHIFT+PAGE DOWN

Page navigation buttons and their keyboard shortcuts are described in the following table:

Button	Description	Keyboard Shortcut
	For multi-page text or image documents, **Previous Page** displays the previous page in the current document. If you are on the first page of a text or image document (or if you are viewing a document with a different file format), **Previous Page** displays the previous document.	CTRL+PAGE UP
	For multi-page text or image documents, **Next Page** displays the next page in the current document. If you are on the last page of a text or image document (or if you are viewing a document with a different file format), **Next Page** displays the next document.	CTRL+PAGE DOWN
[None]	Using your mouse wheel, you can quickly zoom in on or zoom out of a document. While pressing CTRL, scroll your mouse wheel upward to zoom in on the document; scroll downward to zoom out of the document.	CTRL+mouse wheel

Note: Keyboard shortcuts and the arrow keys may not work when the viewer displays PDFs or OLE documents (such as Microsoft Word documents). These documents can cause the shortcuts to be interpreted by the documents' native applications rather than the Release of Information module.

Excluding Specific Pages from a Document

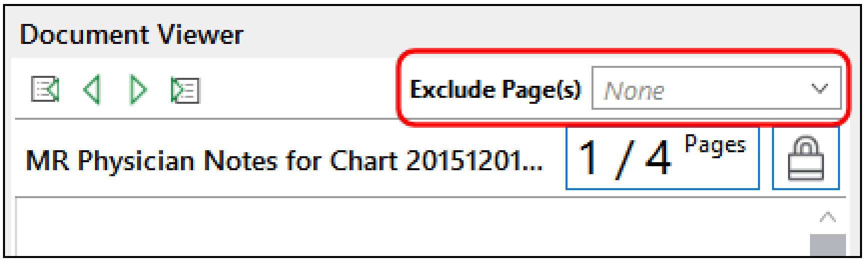
If a document contains pages that should be excluded from the request, you can exclude these pages using the Document Viewer. The pages are excluded only from the document released for the request. The document stored in OnBase is not modified.

Note: If you replace an attachment with a more recent revision of the document, any page exclusions for that document are cleared.

To exclude pages from a document:

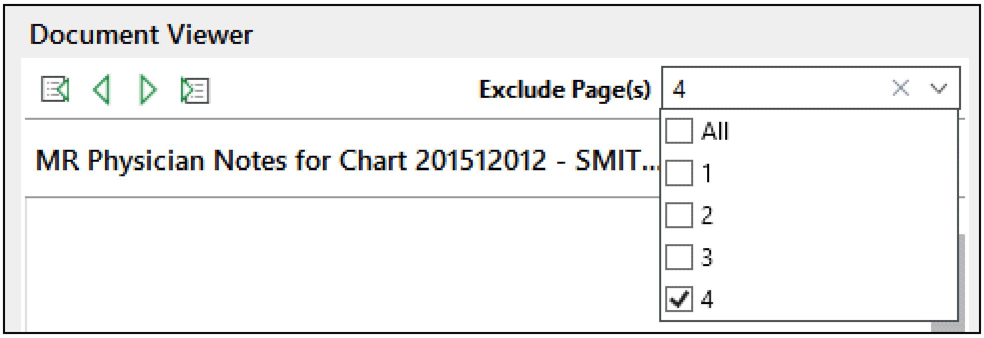
1. Click the **Attachments** button in the ribbon.

2. In the left pane, navigate to the document. The document is displayed in the Document Viewer.
3. Click the **Exclude Page(s)** drop-down in the upper-right corner of the viewer.



4. Select the page numbers to exclude from the request.

   You can use the **All** option to select all pages in the document, and then deselect the pages you want to include. You cannot exclude all pages from a document. To remove the entire document, see Removing Attached Documents.



   To restore pages that were previously excluded, clear the selected page from the drop-down. To restore all pages in a document, click the X displayed on the right side of the drop-down.

5. Save the request.

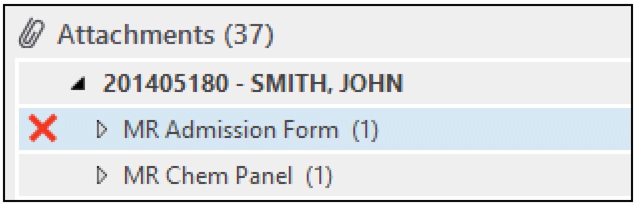
Removing Attached Documents

You can remove attached documents from either the Attachments or Release Order view.

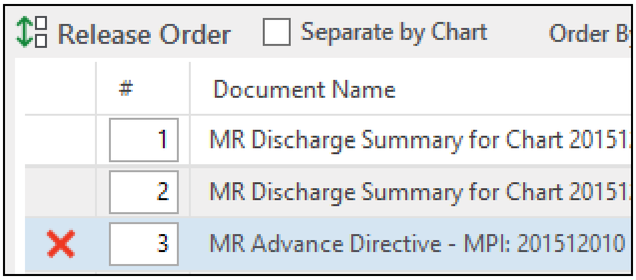
Tip: You can also use the **Add Charts and Documents** button to add or remove entire charts or Document Types from a request.

To remove attached items:

1. Do one of the following:
   - Within the **Attachments** view: To remove a patient, chart, Document Type, or document, rest your pointer over the item, and then click the X displayed to the left of the item. All documents grouped under the item are removed from the request.



   - Within the **Release Order** view: To remove a document, rest your pointer over the document, and then click the X displayed to the left of the document:



2. Click **Save** to update the request.

Reordering Attached Documents

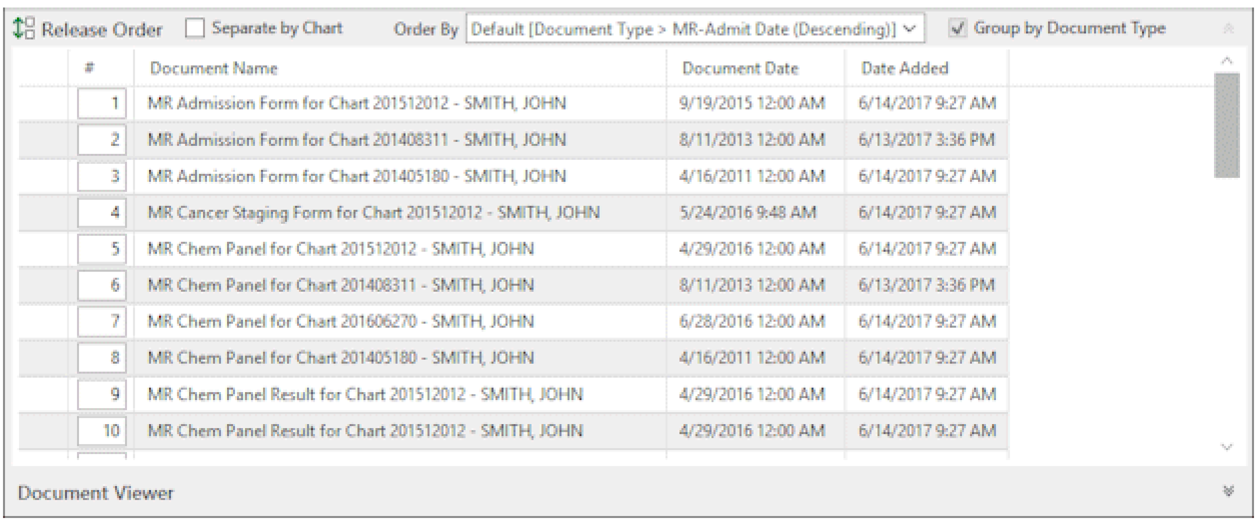
Once you have added documents to a request, you can order them according to the requester's preference.

The initial order of documents is dictated by the Request Type. However, if you have changed the release order before selecting a Request Type, the release order you have configured is used instead of the Request Type release order.

To reorder documents:

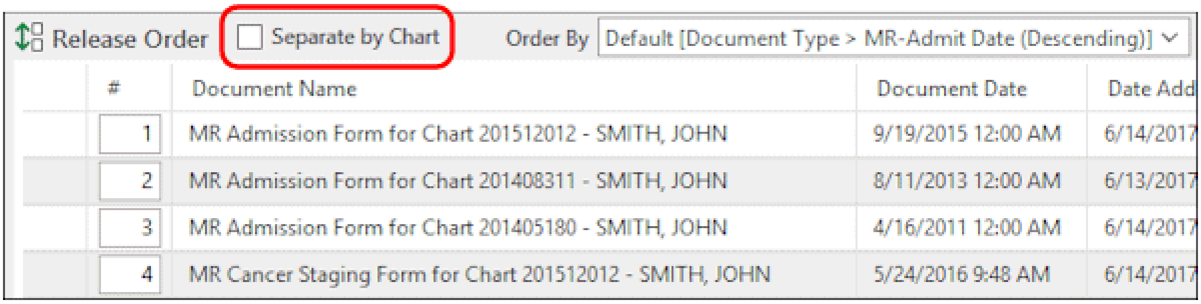
1. Click the **Release Order** button from an open request.

The **Release Order** list is displayed.

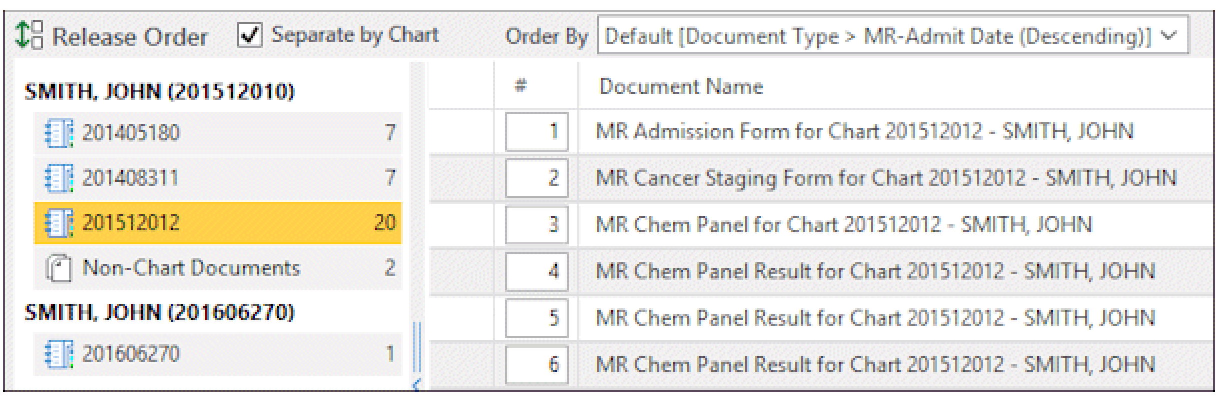


Tip: When reordering documents in a request, save the request often to ensure your intended changes are applied.

2. If the request contains multiple charts, select **Separate by Chart** to ensure documents belonging to the same chart are grouped together. If a request contains multiple patients, enabling this option ensures clinical documents for the same patient are grouped together.



The left pane lists the packets that will be generated for this request. Select a packet to review and sort the documents within it.



3. Change the document order either manually or by selecting an order sequence. See the following topics:
   - Ordering Documents by Selecting a Sequence
   - Ordering Documents Manually
   - Reverting to the Default Order
4. Click the **Save** button from the ribbon to save the new order.

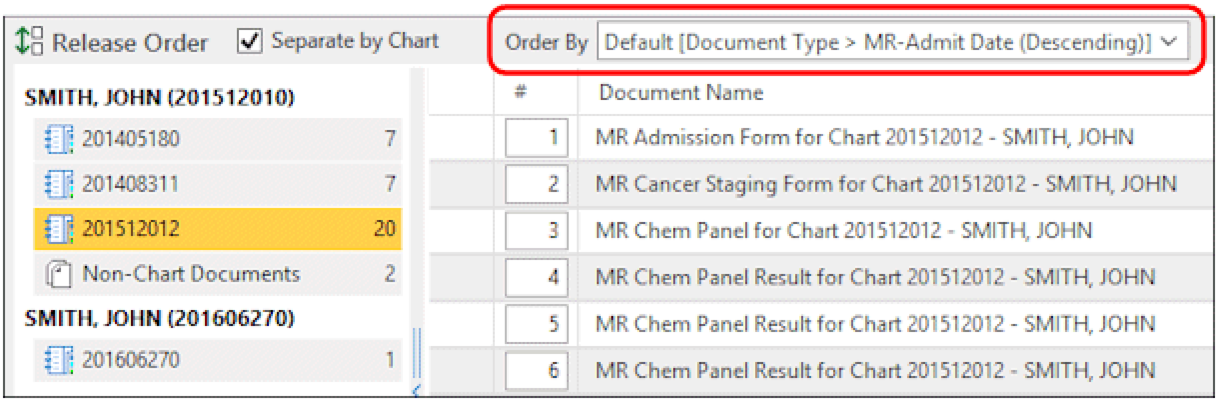
Ordering Documents by Selecting a Sequence

You can reorder documents in the **Release Order** list by selecting a built-in sequence. These sequences allow you to order documents in the list by either Document Date or the date they were added to the request.

Note: Documents cannot be ordered by Keyword Type unless the Request Type is configured to do so. For more information, contact your system administrator.

To reorder documents using an order sequence:

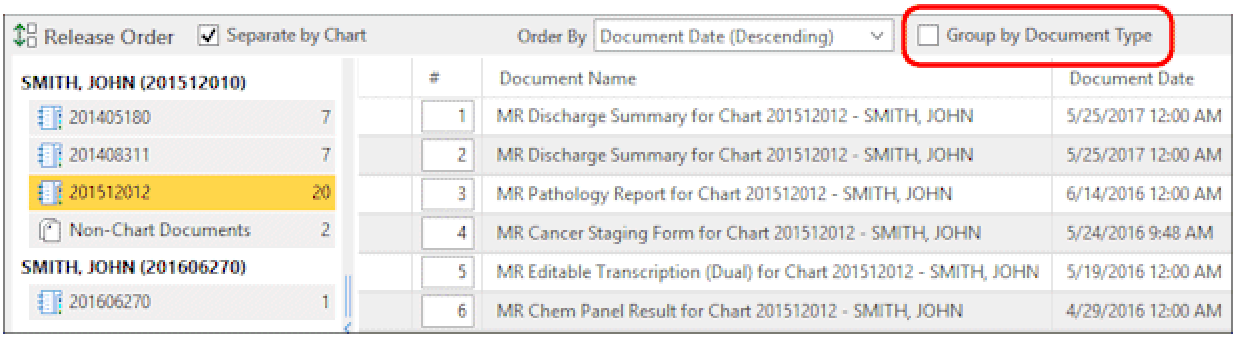
1. Click the **Order By** drop-down list.



2. Select one of the following:

Order By	Description
Date Added (Ascending)	Orders the list by the date the document was added to the request, starting with the earliest date.
Date Added (Descending)	Orders the list by the date the document was added to the request, starting with the most recent date.
Document Date (Ascending)	Orders the list by the Document Date, starting with the earliest date.
Document Date (Descending)	Orders the list by the Document Date, staring with the most recent date.

3. If documents should be grouped by Document Type, select the **Group by Document Type** option.
   When this option is selected, documents are grouped by Document Type and then ordered according to the selected sequence. This option is available only if a sequence described in the previous step is selected.



Note: If documents should be grouped by Document Type within a specified date, contact your system administrator. Document Type grouping in this manner is possible only when the default sort order for the Request Type has been configured accordingly. Alternatively, you can order the document manually.

4. Click **Save**.

Ordering Documents Manually

You can reorder documents manually in the **Release Order** list at any point during the reordering process. Remember to click **Save** when finished.

To reorder documents manually, select a document and do one of the following:

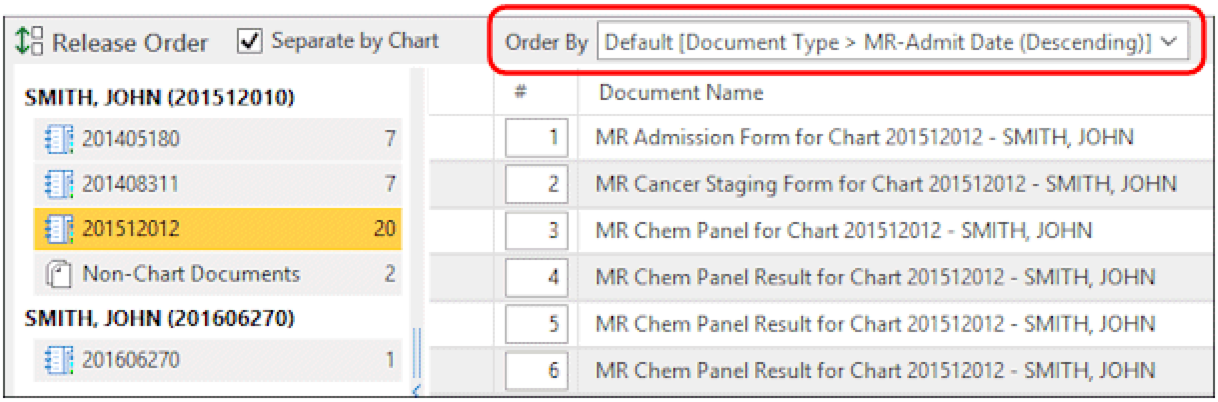
- Click and drag the document to the desired position. If you change your mind while dragging, you can stop the reorder operation by doing one of the following:
  - Right-click the mouse.
  - Drag the item outside the window.
- Click the **#** box next to the document, and then edit the sequence number. Press **Enter** to apply the new sequence.
- Use the **Move** options, which you can access by right-clicking the document list:

Option	Description
Move to Top	Moves the selected document to the top of the list.
Move Up	Moves the selected document up one position.
Move Down	Moves the selected document down one position.
Move to Bottom	Moves the selected document to the bottom of the list.

Reverting to the Default Order

At any point during the reordering process, you can reapply the default order for the Request Type.

To reapply the default order, select the Default option from the **Order By** drop-down list.



Viewing Documents Within the Release Order View

You can quickly view documents attached to a request from the **Release Order** list.

To view a selected document, expand the Document Viewer at the bottom of the list.

If necessary, you can use the Document Viewer to exclude pages from specific documents. See Excluding Specific Pages from a Document.

Note: For general information about working with documents, see the Medical Records Unity Client documentation.

Generating a Document Using a Template

Depending on your system configuration, you may be able to generate and print documents from an open request using pre-configured templates. Templates have the ability to pull information from a request and compose a unique document based on that information. Once a document is composed, it can be printed.

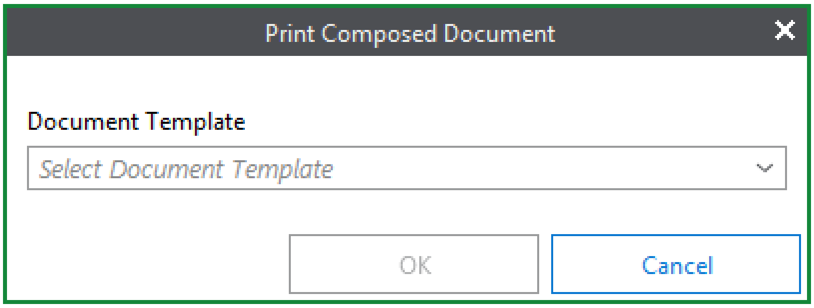
Note: Documents generated using this method are temporary. They are not attached to the request in any way, and they are purged from the system after printing is either initiated or canceled.

To compose a document using a template:

1. From an open request, click the **Print Composed Document** button from the **Release of Information** tab.

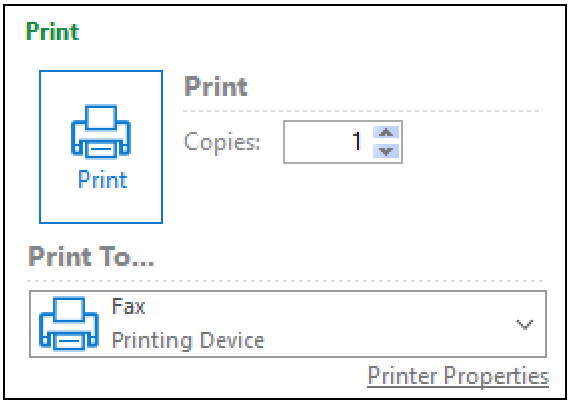
   The **Print Composed Document** dialog box is displayed.

2. Select the template you want to use to compose the document.
3. Click **OK**.

Note: You may experience different behaviors, depending on your system settings. If the generated document is displayed, review and choose to accept the document before moving on. If prompted to upload the document, upload the document to the system before moving on, (the document is purged after the process is either canceled or completed). For more information on these contexts, see Working with System-Generated Documents on page 491.

4. The **Print** dialog box is displayed.



5. Set print options appropriately and click **Print**.

   The document is purged from the system once printing is initiated or canceled.

Note: For more information on print options, see Configuring Print Settings on page 485.

Canceling a Request

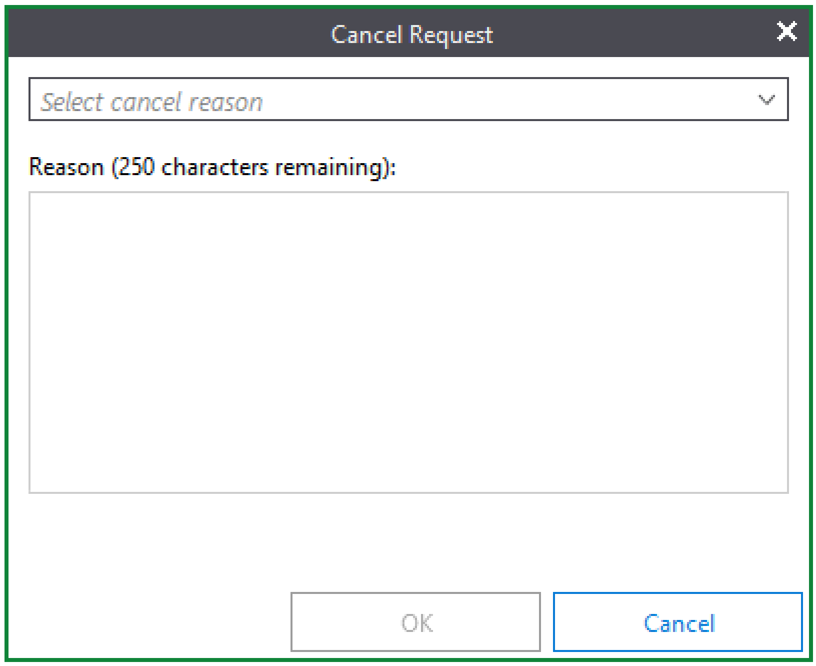
Depending on your privileges, once a request has been saved, the **Cancel** button may be available. Cancel a request if it was created in error or the request is no longer necessary. Once a request is canceled, it cannot be modified in any way and is only available for viewing.

Note: Canceled requests are not displayed in the **Active Requests** list. To display canceled requests, retrieve them using request search.

To cancel a request:

1. From an open request, click the **Cancel** button from the **Release of Information** tab.

The **Cancel Request** dialog box is displayed.



2. Select a reason for canceling a request from the **Select cancel reason** drop-down list.

Note: Once a request is canceled, it cannot be restored or modified.

3. Enter a reason for canceling the request in the **Reason** field. Reasons can be up to 250 characters.

Note: The **Reason** field must contain text before the **OK** button is enabled.

4. Click **OK**. The request is canceled.

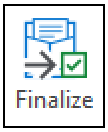
Finalizing a Request

After you have completed work on a request, it is ready to be finalized. When a request is finalized, all currently attached documents are exported into a single PDF file. The documents within the file are displayed according to the release order.

Only finalize a request after you have completed the request form, attached all appropriate charts and documents, and determined the appropriate release order of the attachments. At minimum, the following request form fields must be completed before finalizing a request: **Patient Name**, **Facility**, and **Request Type**. Once a request has been submitted, information and attachments on the request cannot be modified.

Note: The ROI Packet Generation service must be running for request PDF packets to be generated successfully. For more information, contact your system administrator.

To finalize a request, retrieve and open the appropriate request. Click the **Finalize** button from the **Release of Information** tab.



Note: If one or more documents previously included in the request have been deleted from the system but have not been removed the request, you are notified the request cannot be finalized until you have removed the documents from the request. For more information on removing deleted documents from a request, see Removing Deleted Documents from a Request on page 436.

Note: If you have selected to attach Document Types containing external system documents but have not yet initiated their retrieval, you are notified the Document Types have not been retrieved. At this point, you can either move forward and finalize the request by clicking **Yes**, or you can return to the request and retrieve the external system documents by clicking **No**. For more information on retrieving external documents, see ROI and Report Capture for Meditech on page 503.

The request is closed. Any unsaved changes on the request are automatically saved. The status of the request is changed to **Pending Packet**.

You can periodically check to see if the request packet is complete by refreshing the **Active Requests** list. The following icons displayed in the **Active Requests** list and in the request header provide some information on the progress of the packet being generated:

Icon	Description
Awaiting Packet Creation	The packet is currently being prepared and compiled.
Creating Packet	The packet is currently being created.
Error Creating Packet	There was an error during packet creation. For more information, contact your system administrator.

After a packet is generated for the request, the status changes to **Pending Delivery**.

Tip: To modify a request submitted in error, open the request and click the **Revert to Initiated** button from the **Release of Information** tab. For more information, see the following section.

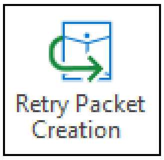
Retrying Packet Creation

If packet generation has failed for a request, you can add the request back to the packet generation queue using the **Retry Packet Creation** button. This button re-queues the request for packet generation without requiring the request to go back to the **Initiated** status.

In some cases, a request may need to go back to **Initiated** in order for the failure reason to be addressed. The **Retry Packet Creation** button is provided for error cases that do not require the request to go back to **Initiated**.

To re-queue a request for packet generation:

1. Open the request.
2. Click the **Retry Packet Creation** button. The request is re-queued for packet generation.



Reverting a Request to the Initiated Status

Before a request is completed, it can be reverted back to the **Initiated** status. **Initiated** is the initial status of a request upon its creation. Reverting a request to its initial status does not remove existing information or attachments on the request. Rather, it simply changes the status of the request, allowing you to repeat certain actions.

Depending on your rights, the ability to revert a request may be available after a request is finalized.

Note: You cannot revert a request that has a status of **Completed**.

To revert a request to its initial status:

1. Retrieve and open the appropriate request.
2. Click the **Revert to Initiated** button from the **Release of Information** tab.

   When setting the request to **Initiated**, previous actions that determined the current status will need to be completed again. This does not affect the information on the request or its attachments.
3. Click **Yes**.

   The request is reverted to the **Initiated** status.

Completing and Exporting a Request

There are multiple ways to complete a request in ROI. Once a request is completed, it can be exported. A request is completed by printing the request or saving the request as a PDF file for the first time. A request is also completed by marking the request as complete.

See the following sections for more information:

- Previewing the PDF Packet on page 484
- Printing a Request on page 484
- Saving a Request to File on page 486
- Marking a Request as Complete on page 488
- Running Pre-Configured Actions for the Request Packet on page 489

Note: If a request contains attached documents, it can only be completed after a request packet has been generated. For more information on generating a PDF packet for a request, see Finalizing a Request on page 481.

Previewing the PDF Packet

Before printing or saving a request to file, you may want to preview the associated PDF packets to ensure all of the desired documents are included and in the appropriate release order. You can also view packets after the associated request has been completed.

You can view a PDF packet only after it has been generated by the ROI Packet Generation service.

To view the PDF packets associated with a request:

1. Open the appropriate request.
2. Click the **Packet Preview** or **View Packet** button from the ribbon. The button's label varies depending on whether the request is completed.

The Packet Preview view is displayed.

- If the request has the **Separate By Chart** option enabled, then the request may be associated with multiple packets. Select a packet from the left pane to display it in the viewer. If packet generation is in progress, the progress is displayed as a percentage next to the packet name.
- The PDF packet is displayed according to system-specified settings and may contain additional formatting, such as page numbers, black-and-white or color pages, and page headers.
- The PDF packet contain a bookmark for each document. To navigate to a specific document in the packet, display the bookmark panel of the PDF reader and click the desired document.

Note: Notes attached to a document are not displayed on the document itself but rather on a separate page after the document. If a note is not included on this page, its Note Type may be configured to never be printed.

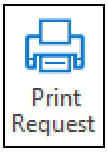
Printing a Request

After a request has been successfully finalized, the request can be printed. The printed document will include the generated request packets, as well as any documents that are automatically generated based on the selected Request Type.

Caution: After a request with the status of **Pending Delivery** has been printed or saved to file for the first time, its status changes to **Complete**. Once a request is **Complete**, you cannot update its contents.

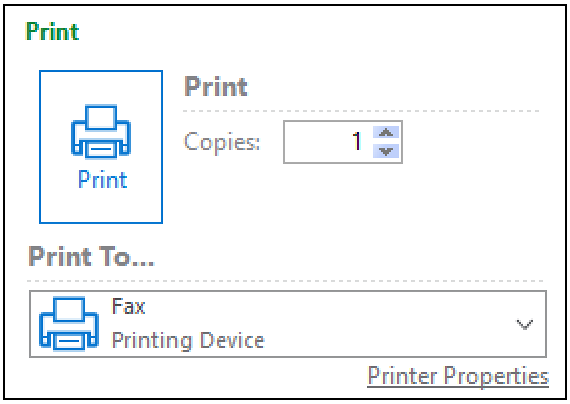
To print a request:

1. Open the appropriate request.
2. Click the **Print Request** button from the **Release of Information** tab.



Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 491.

3. The **Print ROI Request** dialog box is displayed.

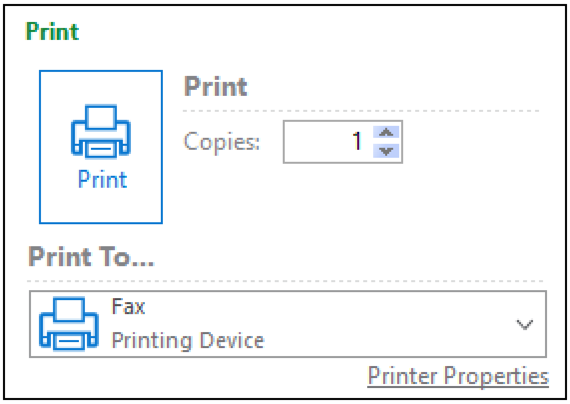


4. Configure the desired print settings and click **Print**.

Note: See the next section for information on how to configure print settings.

Configuring Print Settings

The following section outlines how to configure print settings when presented with the **Print** or **Print ROI Request** dialog box.



To configure print settings:

1. In **Copies**, type or select the number of copies you want to print.
2. Select one of the available printers from the **Print To** drop-down list.

Note: Click the **Printer Properties** hyperlink to configure options specific to the selected printer. See the documentation for your printer for more information on these options. This hyperlink is not available when printing to a print queue. These selections are retained for the duration of your OnBase session.

3. From the **Settings** drop-down list, select **Grayscale** or **Color** to print the document in either black and white or color, respectively.

Note: Whether a request is able to fully be printed in color depends on system configuration (i.e., if you select **Color**, the attached documents may appear to be printed in grayscale, while the cover sheet and inventory pages are printed in color). To determine whether the packet is able to be printed in color, preview the request packet prior to printing or contact your system administrator.

4. Click **Print** after you have configured your settings.

Saving a Request to File

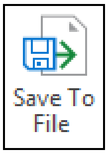
After a request has been successfully finalized, the request can be saved to file. This process saves the associated request packets (if available) as well as any automatically generated documents (such as the cover page) to a local or network location you specify.

Depending on the Request Type, the saved packet files may include a cover page, inventory pages, and requested documents.

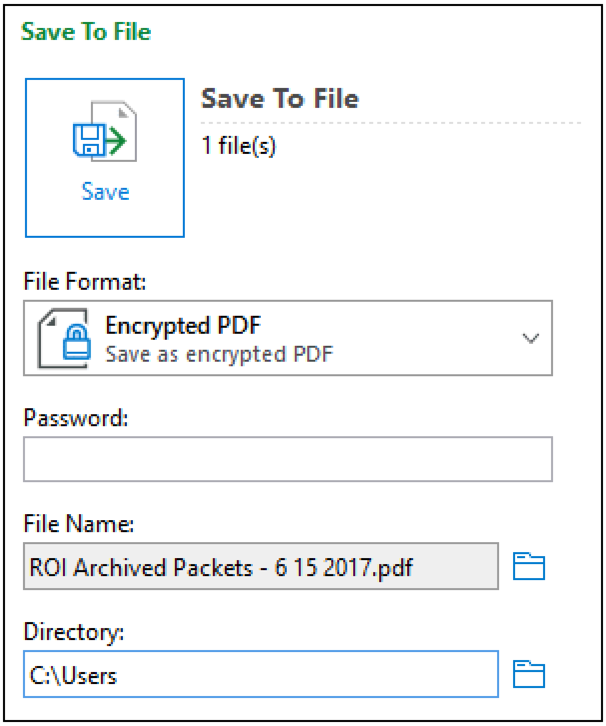
Caution: After a request with the status of **Pending Delivery** has been printed or saved to file for the first time, its status changes to **Complete**. Once a request is **Complete**, you cannot update its contents.

To save a request to file:

1. Open the appropriate request.
2. Click the **Save to File** button from the **Release of Information** tab.



The **Save To File** pane is displayed. The number of files that will be saved is displayed to the right of the **Save** button.



3. From the **File Format** drop-down list, select one of the following options:
   - **Encrypted PDF** - Saves each file as an encrypted PDF, which requires anyone attempting to view the file to provide a password.
   - **Unencrypted PDF** - Saves each file as a standard PDF. No password is required when you select this option.
4. If you selected **Encrypted PDF**, enter a password in the **Password** field. You will need to provide this password to anyone who should be able to view the resulting files.
5. To change the name of the file, click the **Browse** button next to the **File Name** field. The **Save As** dialog box is displayed, allowing you to edit the name as desired.

   The **File Name** field is available only if a single file is being saved. If multiple files are being saved, the files are named based on the associated packet.

6. To specify the directory in which the file should be saved, click the **Browse** button next to the **Directory** field. The **Browse For Folder** dialog box is displayed, allowing you to select the folder where the file should be saved.
7. Click **Save**.

Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 491.

Marking a Request as Complete

Caution: Once a request is completed, it cannot be undone. You can no longer update a request after it is complete.

After a request has been successfully finalized and payment for the request has been received, you can mark a request as complete without printing the request or saving it to file. When you mark a request as complete, any pre-configured system actions for the request packet are also performed. Pre-configured system actions can include sending the request packet to HL7, Workflow, or both.

Note: HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.

To mark a request as complete:

1. Open the appropriate request.
2. Click the **Mark as Complete** button from the **Release of Information** tab.

3. Click **Yes** at the prompt to complete the request and run any pre-configured system actions.

   The **Mark as Complete** button is replaced with the **Run Packet Actions** button.

Note: The **Run Packet Actions** button is only enabled if there are actions configured for the facility. After you click the **Mark as Complete** button, any pre-configured packet actions are run. It is only necessary to click the **Run Packet Actions** button if the actions need to be performed again.

Note: You may experience different behaviors, depending on your system settings. If a system-generated document (e.g., a cover sheet or inventory page) is displayed, you must choose to accept the document before moving on. If you are prompted to upload one or more documents, you must upload them to the system before moving on. For more information on either of these contexts, see Working with System-Generated Documents on page 491.

Running Pre-Configured Actions for the Request Packet

After a request is complete, you can select to run any pre-configured system actions for the request packet. Pre-configured system actions can include sending the request packet to HL7, Workflow, or both.

Note: HL7 messages are sent only for requests with a single patient and a single packet. If a request contains multiple patients or creates multiple packets, the HL7 message will not be sent.

You may or may not need to run system actions, depending on the method used to complete the request:

- If the request was completed using either the Print Request o the request or saving it to file, pre-configured system actions are not automatically performed. Run packet actions if necessary.
- If the request was completed using the **Mark as Complete** button, pre-configured system actions are automatically performed. Only run packet actions if they need to be performed again.

To run pre-configured system actions for a request:

1. Open the appropriate request.
2. Click the **Run Packet Actions** button from the **Release of Information** tab.

Note: The **Run Packet Actions** button is enabled only if there are actions configured for the facility.

   A notification is displayed. If the actions have not been run previously, you are notified that system actions can export the packet and make it available outside of Release of Information. If the actions were previously performed, you are notified that system actions have already been completed.

3. Click **Yes** to run the actions.

Viewing Request History

Actions performed on a request and the status changes of a request are stored in the request history. The request history maintains two separate logs:

- Request Log - records all actions performed on a request (e.g., when the request is assigned, viewed, etc.).
- Status Log - records all the status changes of a request (e.g., when a request status is changed to **Rejected**).

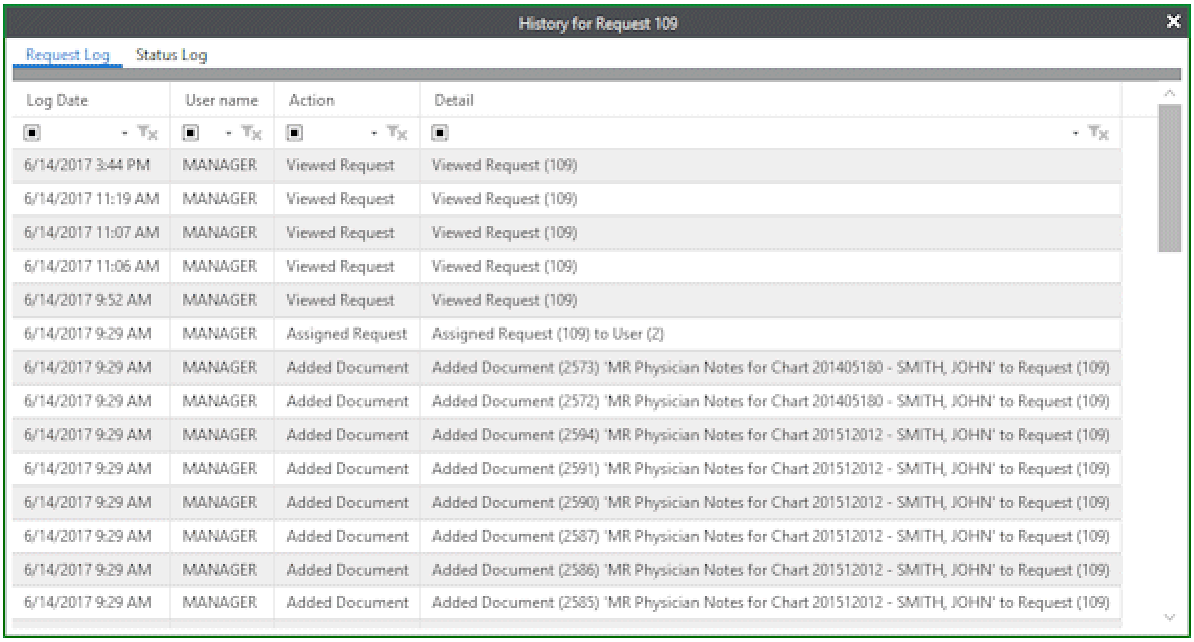
To view the history of a particular request:

1. Retrieve and open the appropriate request.
2. Click the right portion of the **History** button from the **Release of Information** tab.

   You can also click the left portion of the button if you want to view the Request Log portion of the request history.

3. From the drop-down list, do one of the following:
   - Select **Request** to display the Request Log portion of the request history.
   - Select **Status** to display the Status Log portion of the request history.

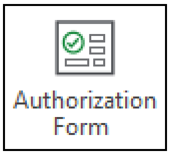
   Depending on which option you selected, that tab is displayed in the **History** dialog box. You can toggle between Request Log and the Status log by clicking the appropriate tab.



Log Date	User name	Action	Detail
6/14/2017 3:44 PM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:19 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:07 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 11:06 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 9:52 AM	MANAGER	Viewed Request	Viewed Request (109)
6/14/2017 9:29 AM	MANAGER	Assigned Request	Assigned Request (109) to User (2)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2573) 'MR Physician Notes for Chart 201405180 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2572) 'MR Physician Notes for Chart 201405180 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2594) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2591) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2590) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2587) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2586) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)
6/14/2017 9:29 AM	MANAGER	Added Document	Added Document (2585) 'MR Physician Notes for Chart 201512012 - SMITH, JOHN' to Request (109)

Viewing the Request Authorization Form

If a request was created using the **Create Release of Information Request** Workflow action, then the **Authorization Form** button is available from the **Release of Information** tab of an open request.



To view the authorization form that triggered the creation of the request via Workflow, click the **Authorization Form** button.

Working with System-Generated Documents

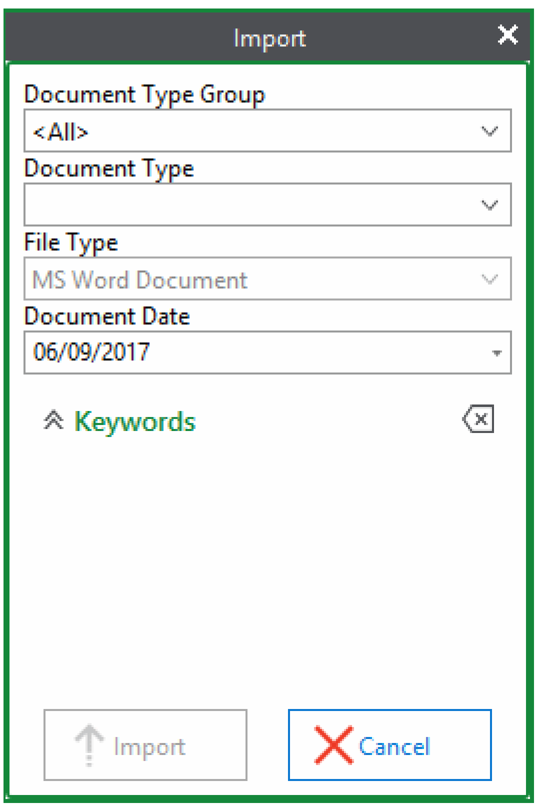
When you execute certain processes within Release of Information, documents may be automatically generated and displayed. Depending on your system configuration, you may be required to take action on these system-generated documents before completing a task.

The below process outlines what to do if you are presented with a preview of the document and or prompted to upload the document:

1. If the document is displayed, modify the document, if necessary. Depending on your system configuration, the document may be read-only.
2. Select from the following buttons on the **Document Composition** tab:

Button	Description
Accept	Saves the document. **Note:** You must accept the document before the selected task can be completed
Redo	Starts the document creation process over from the beginning.
Cancel	Discards the document.
Print	Prints the document.

3. If applicable, update the values in the **Import** dialog box.



Depending on your system configuration, Keyword Values may already be populated. Specify additional Keyword Values, if necessary, and supply any other necessary values to index the document.

4. Click **Import**. The document is imported into OnBase.

Keyboard Shortcuts

The following keyboard shortcuts are available within the Request Editor window (i.e., an open request).

Shortcut	Description
Ctrl + S	Saves the request.
Ctrl + N	Closes the current request and creates a new request. You are prompted to save any unsaved changes before closing.
Ctrl + R	Displays the **Cancel Request** dialog box.
Ctrl + F	Finalizes and creates a PDF packet for the request.
Ctrl + Shift + A	Displays the **Assign Request** dialog box. **Note:** Depending on your privileges, this shortcut may automatically assign the request to you without displaying the **Assign Request** dialog box.
Ctrl + Shift + U	Unassigns the request.
Ctrl + T	Displays the **Attachments** list.
Ctrl + L	Displays the **Release Order** list.
Esc	Closes the Request Editor window.

ROI User Options

From the **Release of Information** tab of the **User Options** dialog box, you can control certain prompts and actions within the Release of Information interface.

To access ROI user options:

1. Click the Application button and select **User Options**.
2. The **User Options** dialog box is displayed.
3. Select **Release of Information**.
4. Choose from the following:

Option	Description
Prompt me when deleting Document Types from a request	Enables a prompt that alerts you when removing Document Types from a request. When you remove a Document Type from a request, it is removed from all charts on the request.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Default facility for new requests</td><td>Select a default facility for new requests from the drop-down list. This facility is automatically selected when you create new requests.
Select <None> from the drop-down list if you do not want to select a default facility. No facility is automatically selected when you create new requests.
Note: When either a facility or <None> is selected, you are not prompted to select a default facility when creating a new request.</td></tr>
<tr><td>Prompt me when removing my documents from the Virtual Print Gallery</td><td>Enables a prompt that alerts you when removing your documents in the Virtual Print Gallery.
This prompt is only applicable to documents you printed. When removing documents other users printed, you are always prompted.
Note: The Prompt me when removing my documents from the Virtual Print Gallery option is only available when you are licensed for Virtual Print Driver.</td></tr>
<tr><td>Automatic External Document Retrieval</td><td>Determines whether external system documents are automatically retrieved upon closing a request that you have selected to add external system documents to. Choose from the following:
• Always - Automatically retrieves external system documents upon closing the request.
• Never - Never retrieves external system documents upon closing the request. The process must be completed manually.
• Prompt - Prompts whether you would like to retrieve external system documents upon closing the request. From the prompt, you can decide whether to always retrieve external system documents or never retrieve external system documents upon closing a request by selecting Always do this when closing a request and clicking Yes to automatically start retrieval or No to manually retrieve documents later.
Note: The Automatic External Document Retrieval option is only available when you are licensed for Report Capture for Meditech.</td></tr>
</table>

5. Click **Save** when finished.

ROI and the Virtual Print Driver

If your solution includes the Virtual Print Driver module, then OnBase Release of Information can attach documents printed and uploaded using the Virtual Print Driver to a request.

Documents can be attached to a request automatically upon uploading the document into OnBase, or they can be selected and attached manually.

Consider the following when printing using the Virtual Print Driver:

- Running more than one type of OnBase client may conflict with ROI's ability to detect incoming documents. For example, do not open both the Medical Records Unity Client and the OnBase Unity Client at the same time.
- The size of a print job affects printing time. A document with a large quantity of pages printed in color is going to take longer to print than a one-page document printed in black and white.

For more information on using the Virtual Print Driver, as well as Virtual Print Driver troubleshooting tips, see the **Virtual Print Driver** documentation.

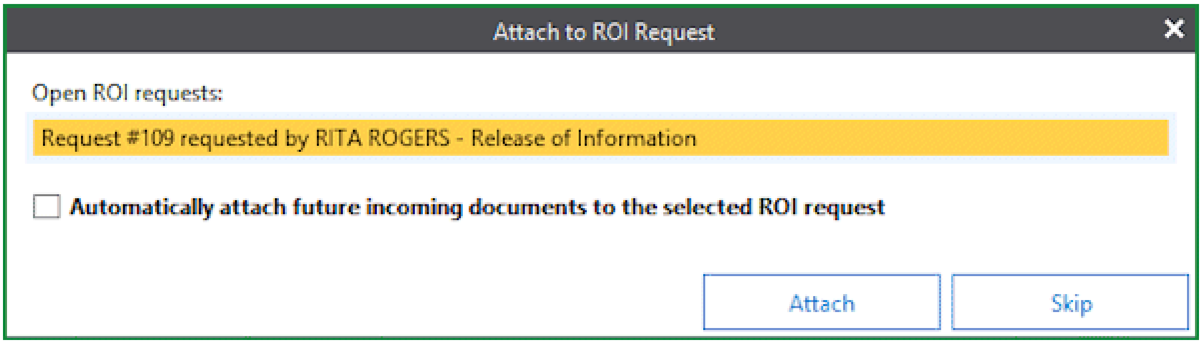
Automatically Attach Incoming Documents to a Request

Once a document is printed and uploaded using the Virtual Print Driver, it can automatically be attached to a request. You can also choose to have all incoming documents printed with the Virtual Print Driver to be automatically attached to an open request during a given session.

Note: For more information on printing and uploading documents to OnBase using the Virtual Print Driver, see the Unity Client usage information in the Virtual Print Driver documentation.

To automatically attach a document to a request using the Virtual Print Driver:

1. Open the ROI request(s) you would like to attach documents to.
2. Print a document using the Virtual Print Driver.
3. Follow the prompts to import the document into OnBase.
4. The **Attach to ROI Request** dialog box is displayed after the document is imported.



5. Select the request you would like the document to be attached to.

   If you do not want to add the document to one of the listed requests, click **Skip**. The document is then available to select and add to a request by clicking the **Add From Virtual Print Gallery** button from an open request. For more information, see the Select Printed Documents to Attach to a Request section.
6. Do one of the following:
   - To attach the incoming document to the request, click **Attach**.
   - To attach the incoming document and all future incoming documents to the selected request while the request remains open, select **Automatically attach future incoming documents to the selected ROI request**, and then click **Attach**.

Note: When you select **Automatically attach future incoming documents to the selected ROI request** and click **Attach**, the **Attach to ROI Request** dialog is not displayed again until you either close the selected request, open another request, create a new request, or log out and log back in.

Depending on options you selected during the upload process, the document may be displayed in a new window. You can close the document after clicking either **Attach** or **Skip** in the **Attach to ROI Request** dialog box.

7. Save the request.

   If you exit the request without saving these changes, the newly added documents are removed from the request. You can add them back to the request by clicking the **Add From Virtual Print Gallery** button. For more information, see the Select Printed Documents to Attach to a Request section.

Select Printed Documents to Attach to a Request

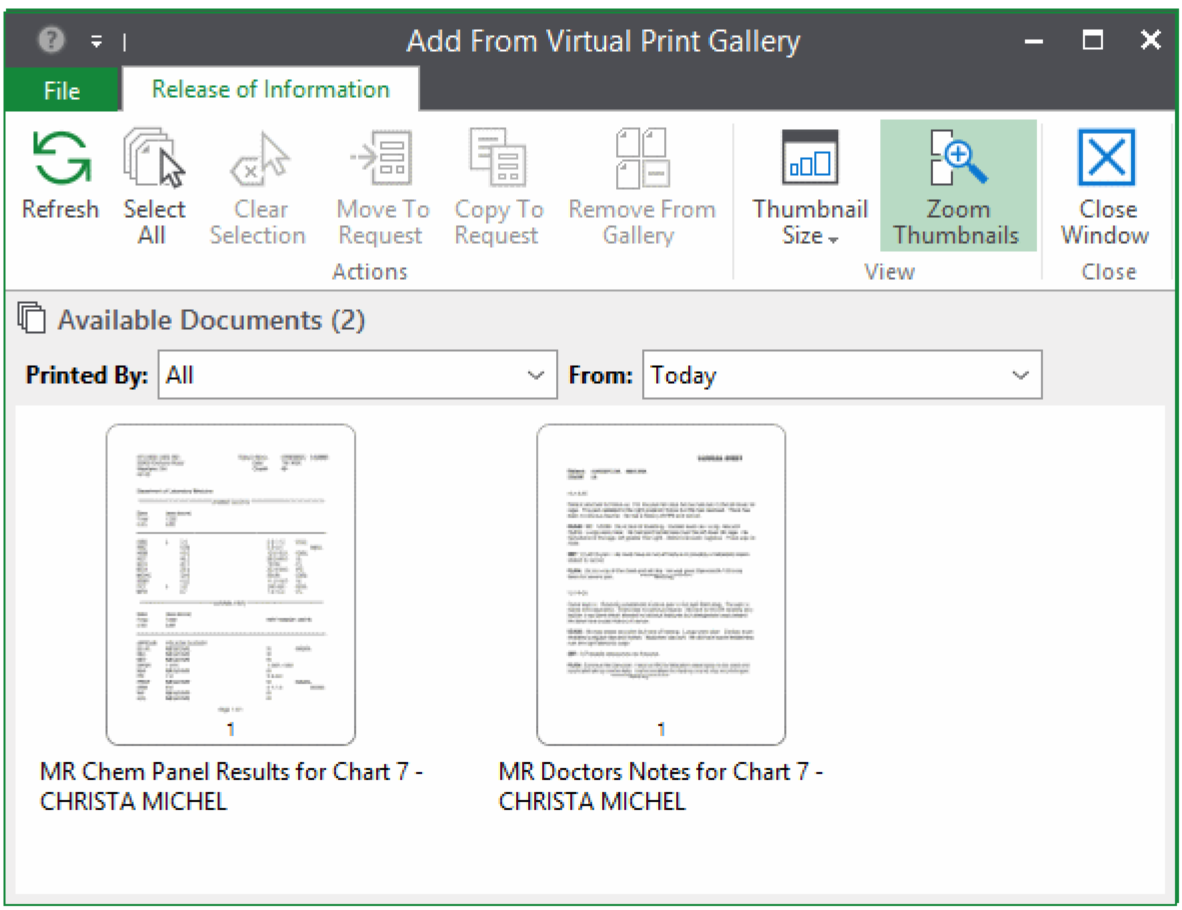
Documents that are printed with the Virtual Print Driver and are not attached to a request upon being uploaded can be manually selected and attached to the request.

To select and attach documents printed with the Virtual Print Driver:

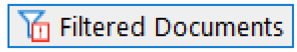
1. From an open request, click the **Add From Virtual Print Gallery** button in the **Release of Information** ribbon.

Note: The appearance of the **Add From Virtual Print Gallery** button differs based on licensing.

The **Add From Virtual Print Gallery** dialog box is displayed. Documents printed and uploaded with the Virtual Print Driver are displayed in the **Available Documents** list by the date and time they were added in descending order.



Depending on your rights, some documents may be filtered from the **Available Documents** list. The following icon is displayed in the upper right-hand corner of the **Available Documents** list in this scenario:



Note: For more information on Document Type rights, contact your system administrator.

2. Narrow the results in the **Available Documents** list using the following drop-down lists:

Drop-down List	Description
Printed By	Displays only documents printed by the selected user. By default, your User Name is selected. Available users include only those who have printed documents using the Virtual Print Driver. To view documents printed by all users, select **All**.
From	Displays only documents printed within the selected time frame. By default, **Today** is selected. To view documents printed at any time, select **All**. You can also select to view documents printed in the **Last 7 Days** or **Last 30 Days**.

Tip: To update the list at any time, click the **Refresh** button. This option is also available from the right-click context menu.

3. Do one of the following:
   - Click each document you would like to add to the request.
   - Click the **Select All** button to select all available documents.

You can also press **Ctrl + A** to select all available documents. This option is also available from the right-click context menu.

For information on previewing documents before attaching them, see the Previewing Printed Documents Before Attaching Them to a Request section.

To deselect selected documents, click each document again, or click the **Clear Selection** button to deselect all selected documents.

This option is also available from the right-click context menu.

Note: Filtering the list of available documents deselects any document filtered out of the list. For example, you select Document A and Document B. Upon changing the User Name in the **Printed By** drop-down list, Document B is no longer displayed. At this time, Document B is not selected. It must be filtered back into the list and selected again to be attached to the request.

4. Once you have selected the appropriate documents, do one of the following:
   - Click the **Move To Request** button to attach the selected documents to the request and remove them from the **Available Documents** list.

     This option is also available from the right-click context menu.

Note: If you close the request without saving it after moving selected documents, the selected documents are available the next time you access the **Add From Virtual Print Gallery** dialog box. Documents are only permanently removed from the **Available Documents** list after the request has been saved.

   - Click the **Copy To Request** button to attach the selected documents to the request. The documents remain in the **Available Documents** list.

     This option is also available from the right-click context menu.

   The documents are attached to the request and can be viewed in the **Attachments** layout.
5. Save the request. If you exit the request without saving these changes, the documents are removed from the request. Any documents removed from a request in this type of scenario become available to add to a request the next time you access the **Add From Virtual Print Gallery** dialog box.

Previewing Printed Documents Before Attaching Them to a Request

When selecting printed documents to attach to a request, you can change the way document thumbnails are displayed or view the document in a new window. See the following sections for more information:

- Using the View Buttons
- Opening a Document in a New Window

Using the View Buttons

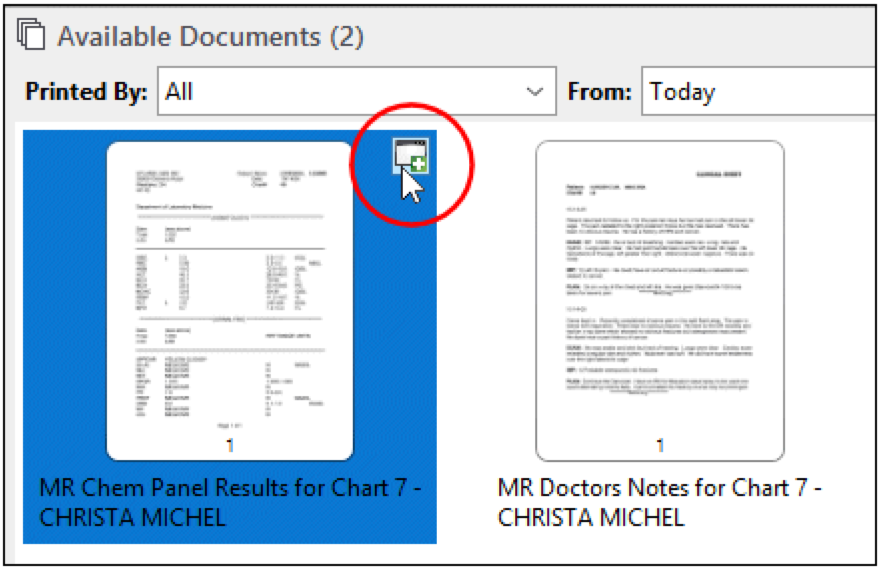
The **View** buttons in the **Add From Virtual Print Gallery** dialog box control how document thumbnails are displayed in the **Available Documents** list.

View Button	Description
Thumbnail Size 	Determines the size of the thumbnail. When you click this button, you can choose from **Small**, **Medium**, or **Large**. By default, **Medium** is selected. This option is also available from the right-click context menu.
Zoom Thumbnails 	Toggles whether thumbnails are zoomed in while hovering the mouse over them. If this setting is selected, a zoomed-in view of the thumbnail is displayed when you rest your pointer over it. The zoom percentage is determined by the thumbnail size. For example, the zoom is greater when the thumbnail size is **Large** instead of **Medium**. If this setting is deselected, a tooltip displays information about the document when you rest your pointer over the thumbnail. The information includes the document Auto-Name string, the date and time the document was uploaded, the Document Type, and the number of pages included in the document. This option is also available from the right-click context menu.

Opening a Document in a New Window

To view a document and all of its pages in a new window from the **Add From Virtual Print Gallery** dialog box, do one of the following:

- Double-click the document thumbnail.
- Rest the mouse over the document thumbnail, and then click the **Open in New Window** button.



Tip: If the **Zoom Thumbnails** button is selected, it may help to deselect it so that the enlarged thumbnail does not hide the **Open in New Window** button.

The document is displayed in the Document Viewer window. The ribbon above the Document Viewer allows you to use one of the following buttons to select or deselect the current document in the **Add From Virtual Print Gallery** dialog box:

Button	Description
Add To Selected 	Selects the document in the **Add From Virtual Print Gallery** dialog box. This button is available only if the document is not currently selected.
Remove From Selected 	Deselects the document in the **Add From Virtual Print Gallery** dialog box. This button is available only if the document is currently selected.

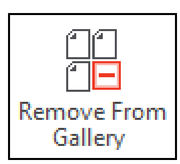
Note: For information on using the Document Viewer, see the Medical Records Unity Client documentation.

Removing Printed Documents from the Gallery

You can remove documents from the Virtual Print Gallery.

To remove one or more documents from the Virtual Print Gallery:

1. Select the appropriate documents from the **Available Documents** list in the gallery.
2. Do one of the following:
   - Click the **Remove From Gallery** button.

   - Right-click and select **Remove From Gallery**.

Note: Depending on your configuration or the document(s) you are removing, you may be prompted to confirm this action. Ensure other users do not need the documents before removing them from the gallery.

ROI and Report Capture for Meditech

If your solution includes the Report Capture for Meditech module, then OnBase Release of Information can be used to import and attach external system (e.g., Meditech) documents to be released in a request.

When attaching Document Types to a request, some of the documents contained within these Document Types may reside in an external system. These documents must be retrieved from the external system to be attached to and released with the request. For general information on attaching Document Types to a request, see Attaching Charts and Documents Using the Wizard on page 453.

Proceed to the next section to retrieve external system documents.

Note: See the Report Capture for Meditech documentation for more information on external system configuration.

Retrieving External System Documents

Once you have attached Document Types to a request, you are able to retrieve and attach external system documents associated with them.

Note: Depending on your settings, retrieval may automatically occur upon closing the request, or you may be prompted to automatically retrieve external system documents upon closing a request. For more information on configuring automatic external document retrieval, see ROI User Options on page 493.

To manually retrieve external system documents from the external system:

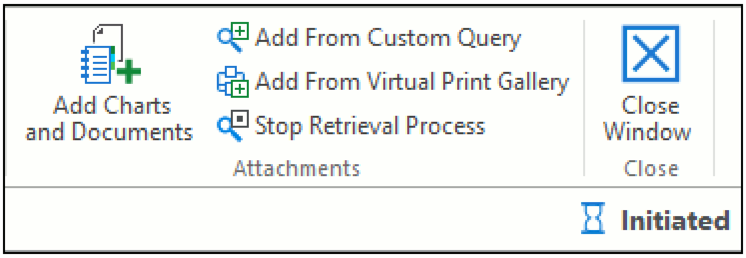
1. Be sure you have selected the appropriate Document Types containing external documents. For more information on attaching Document Types to a request, see Attaching Charts and Documents Using the Wizard on page 453.
2. Click the **Retrieve External Documents** button from the **Release of Information** tab of the request.

Note: The appearance of the **Retrieve External Documents** button differs based on licensing.

3. Upon clicking the **Retrieve External Documents** button, a prompt may be displayed:

   The retrieval process may take a while. It is recommended you close the request now and reopen it when the retrieval process is complete. The current status of the retrieval process is displayed in the **Active Requests** list. Continue?

4. If the above prompt is displayed, do one of the following:
   - Click **OK** to begin the retrieval process.
   - Select the **Do not prompt me again** option on the prompt to disable the prompt in the future, and then click **OK** to begin the retrieval process. This prompt cannot be enabled after it is disabled (i.e., you won't be informed about the retrieval process next time you click the **Retrieve External Documents** button).
   - Click **Cancel** to cancel the retrieval process.
5. You are notified external document retrieval was successfully initiated.
   - The **Retrieve External Documents** button is toggled to the **Stop Retrieval Process** button.
   - An hourglass is displayed in the request header.



At this point, it is recommended you close the request until the retrieval process is complete.

Note: During a retrieval process, you cannot add charts or documents to the request from the Add Charts and Documents wizard without first stopping the retrieval process. For more information, see the section on stopping an external system document retrieval process.

Stopping External System Document Retrieval

Once an external system document retrieval process is started, the **Retrieve External Documents** button is toggled to the **Stop Retrieval Process** button. You can stop a retrieval process by clicking this button.

Note: The appearance of the **Stop Retrieval Process** button differs based on licensing.

A retrieval process is also be stopped by doing one of the following:
- Canceling or rejecting the request.
- Clicking the **Add Charts and Documents** button and clicking **Yes** at the prompt.

Note: Although unlikely, once the process is stopped (either by user intervention or an error), some of the external documents may still be added to the request.

Checking the Status of External System Document Retrieval

From the **Active Requests** list of the Release of Information layout, you can determine what requests have attempted to retrieve external system documents by viewing the **Status** column.

Note: For more information on viewing the **Active Requests** list, see Opening Release of Information on page 424.

Requests that have attempted to retrieve external system documents display one of the following icons next to the status in the **Status** column:

Icon	Status Description
	External system document retrieval is in progress. This process may take a while. **Tip:** To expedite the process, you should not have the request opened. The **Attachments** list cannot be updated if the request is locked.
	External system document retrieval is successfully complete.
	External system document retrieval stopped, due to an error during the retrieval process.

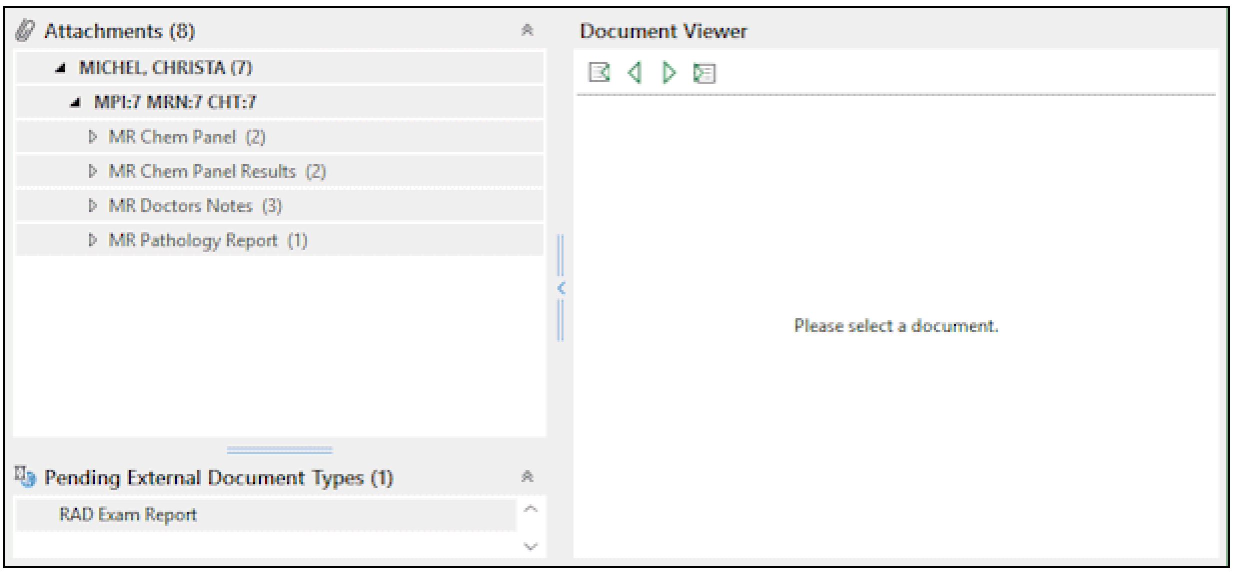
Viewing Pending External System Document Types

After external document retrieval has been initiated, you can view the Document Types containing external documents that have not been retrieved. This includes Document Types that either are in the process of being retrieved or still need to be retrieved (e.g., after an external system document retrieval process is stopped).

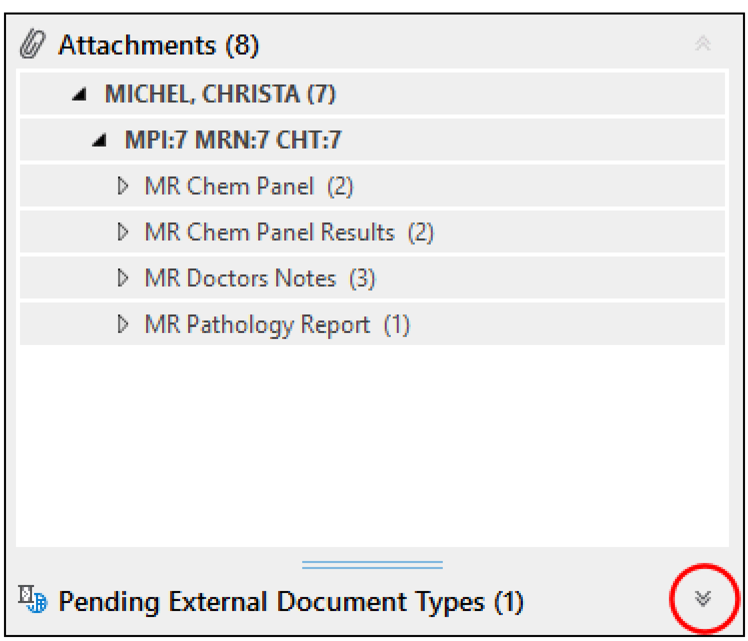
To view all pending Document Types that have not been fully added to the request:

1. Retrieve and open the appropriate request.
2. Click the **Attachments** button from the **Release of Information** tab.

The **Attachments** layout is displayed.



3. Expand the **Pending External Document Types** pane (if necessary).



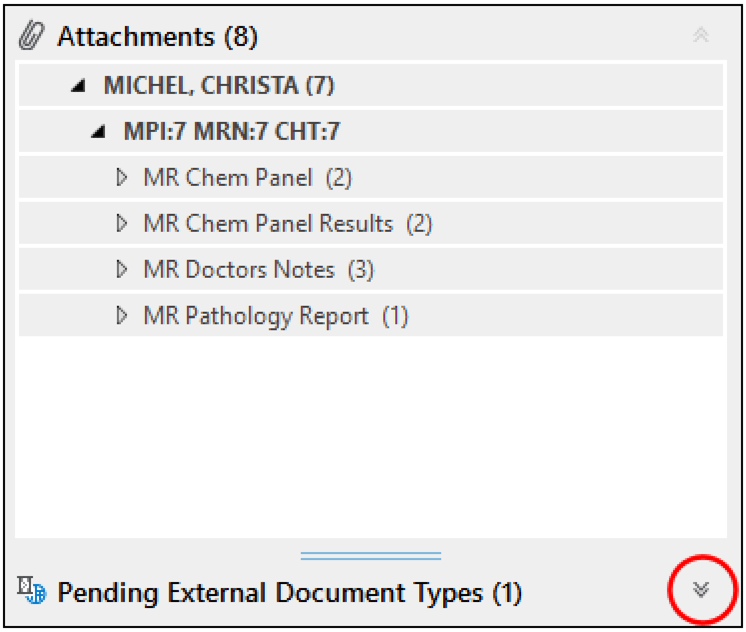
4. All Document Types that have not been retrieved are displayed in the **Pending External Document Types** pane.

Removing Pending Document Types

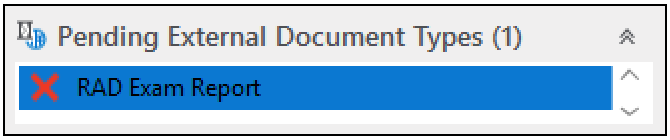
All Document Types containing external system documents that have not been fully retrieved are listed in the **Pending External Document Types** pane in the **Attachments** layout of a request.

To remove a pending Document Type from the request, from the **Attachments** layout:

1. Expand the **Pending External Document Types** pane (if necessary).



2. Rest the mouse pointer of the appropriate Document Type in the **Pending External Document Types** pane.
3. Click the red **X** on the left side of the list.

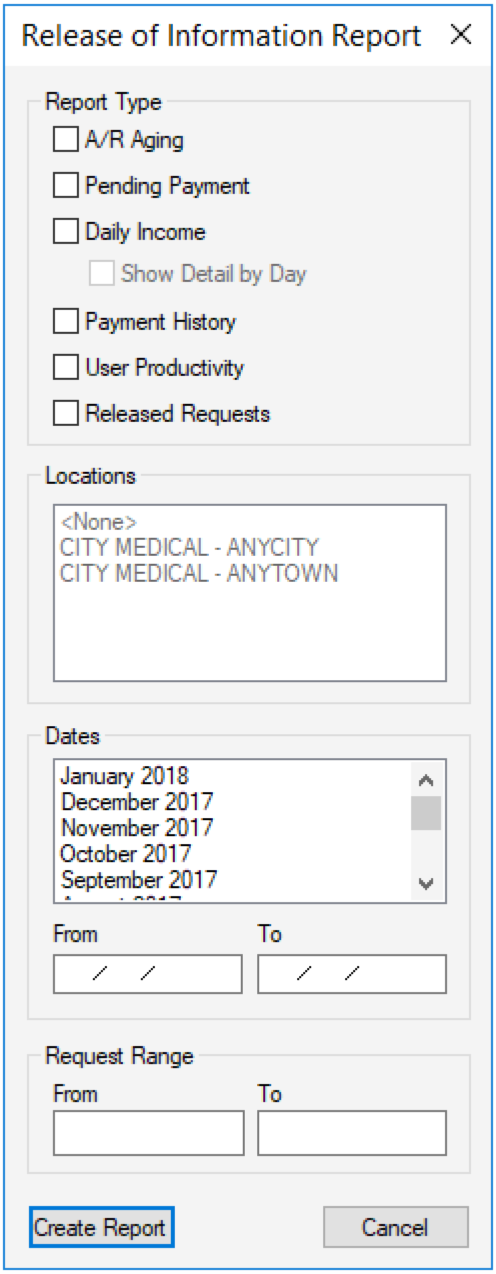


The Document Type, including any documents (OnBase or external) from that Document Type that have already been retrieved, is completely removed from the request.

Running Release of Information Reports

Users with administrative ROI privileges can run ROI accounts receivable reports from the OnBase Client.

1. From the OnBase Client, select **Admin | Release of Information Reports | Generate Report(s)**. The **Release of Information Report** dialog box is displayed.



2. Select a **Report Type**. Available report types are described in the following table:

Report Type	Description
A/R Aging	This report displays information about outstanding bills organized by number of days outstanding (fewer than or equal to 30 days, within 31 to 60 days, within 61 to 90 days, and more than 90 days past due).
Pending Payment	This report displays the total amount owed per location and the grand total amount due for all selected locations.
Daily Income	This report groups outstanding bills by date billed and lists both amount due for each bill and the grand total amount due. The **Show Detail by Day** option lists amount due for each day in which a request was billed.
Payment History	This report groups paid requests by location. The report lists the total number of days to pay for a specific request and the average number of days to pay per location.
User Productivity	This report lists the number of requests completed by each user who has ROI privileges and the average number of days each user took to complete the requests. If a user's average days to complete a request is less than 0.1, but the user has completed at least one request, then the user's average days to complete is rounded up to 0.1. If a user has not completed any requests within the report parameters, then an average of 0.0 days is displayed for that user.
Released Requests	This report helps address HIPAA requirements by displaying information about requests that have been released or delivered from OnBase. The following information is listed for each completed request: Request number; requester's name, location, and company; patient's name; purpose; delivery method; date/time released; total number of days to release; number of pages, external pages, and external items; and the total billed amount. If a request is re-delivered using a different delivery method, the report reflects the last delivery method used and the last date of release. At the end of the report, the total number of released requests and the average number of days to release each request are displayed.

3. Under **Location**, select one or more locations to include in the report. To include locations that were not saved, select **<None>**.
4. Specify a date and/or request number range.
5. Click **Create Report**. The report is displayed. You can also retrieve the report from the Document Type configured for ROI reports at a later date.

Release of Information displays information about requests and charts within various columns. The following topics describe these columns and their corresponding search fields (if applicable):

- Request Columns and Search Fields on page 510
- Chart Columns and Search Fields on page 512

Note: Some column and field names are configurable. The names used by your organization may vary from the names used in the following topics. See your system administrator for more information.

Request Columns and Search Fields

The following table describes columns and search fields associated with ROI requests.

Note: Date values are displayed according to workstation locale.

Column / Field Name	Description
Assigned To	The user assigned to work on the request.
Comments	Any user comments displayed in the **Comments** field of the request form. Comments are available in standard mode ROI only. They are not available in integrated mode.
Current Invoice	The date the latest invoice for the request was created and printed. Invoice information applies to standard mode ROI only. It does not apply to integrated mode.
Days Until Due	The number of days until the request due date, if applicable. If **Overdue** is displayed, then the due date is in the past and the request is still in progress. If **On Hold** is displayed, then the request is on hold and the due date is subject to the removal of the hold.
Due Date	The date by which the request needs to be completed, if applicable. If **On Hold** is displayed, then the request is on hold, and the due date is subject to the removal of the hold. When the hold is removed, the due date will be pushed out to account for the days the request was on hold.

Column / Field Name	Description
Facility Name	The facility from which the information is being requested.
Medical Record #	The MRN of the patient whose information is being requested. If multiple patients are attached to a request, this column displays **{#} Patients**, where **{#}** is the number of patients attached. Click this value to display information about the attached patients.
MPI Number	The MPI of the patient whose information is being requested. If multiple patients are attached to a request, this column displays **{#} Patients**, where **{#}** is the number of patients attached. Click this value to display information about the attached patients.
Original Invoice	The date the original invoice for the request was created and printed. An invoice is considered aged if it is unpaid and 30 or more days have passed since the original invoice date. Invoice information applies to standard mode ROI only. It does not apply to integrated mode.
Patient DOB	The date of birth of the patient whose information is being requested. If multiple patients are attached to a request, this column displays **{#} Patients**, where **{#}** is the number of patients attached. Click this value to display information about the attached patients.
Patient First Name	The first name of the patient whose information is being requested.
Patient Last Name	The last name of the patient whose information is being requested.
Patient Name	The name of the patient whose information is being requested. If multiple patients are attached to a request, this column displays **{#} Patients**, where **{#}** is the number of patients attached. Click this value to display information about the attached patients.
Priority	The priority of the request, set during request creation. The priority suggests how soon a request should be completed. Priorities are non-configurable labels whose meanings may differ by facility. These meanings should be clearly communicated, especially if a due date is not supplied. A priority can be **High**, **Medium**, or **Low**.
Reference Number	An external tracking number associated with the request. This number is entered manually on the request form.
Request Date	The date the request was received. **Note:** If the value you enter in the search field is invalid, the field will revert to its last valid value when you select another field or execute the search. If no value was previously entered, the field will be cleared.

Column / Field Name	Description
Request Number	The unique, automated number assigned to the request upon creation.
Request Reason	The descriptive reason the information is being requested. A request reason might have been entered on the request form to explain the Request Type.
Request Type	The selected Request Type of the request. For more information on available Request Types, see your system administrator.
Requester Name	The name of the person or group requesting the release of information. Requester information applies to standard mode ROI only. It does not apply to integrated mode.
Requester Phone	The phone number of the person or group requesting the information. Requester information applies to standard mode ROI only. It does not apply to integrated mode.
Status	The current status of the request.

Chart Columns and Search Fields

The following table describes columns and search fields associated with charts:

Column / Field Name	Description
Admit Date	The date the patient was admitted.
Admit Type	The type of admission.
Dept. Name	The department where the patient was treated.
Discharge Date	The date the patient was discharged.
Chart ID #	The chart ID, also called the account number, episode number, visit number, or encounter number.
Facility Name	The name of the facility where the patient was treated.
Medical Record #	The patient's MRN.
MPI Number	The patient's master patient index.
Patient Classification	The class used to categorize the patient. The meanings of patient classification values may vary by site.

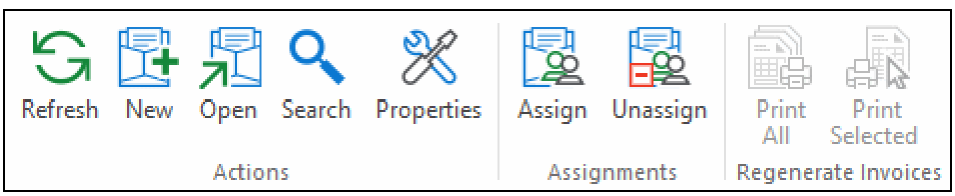
Column / Field Name	Description
Patient First Name	The patient’s first name.
Patient Last Name	The patient’s last name.
Patient Type	The patient type. The meanings of patient type values may vary by site.
Unit Name	The unit where the patient was treated.

Ribbon Button Descriptions

The following topics describe the buttons available from the **Release of Information** ribbon tabs in each layout. These pages can be printed and used as quick reference guides for users with various roles.

See the following topics:

Main Release of Information Layout

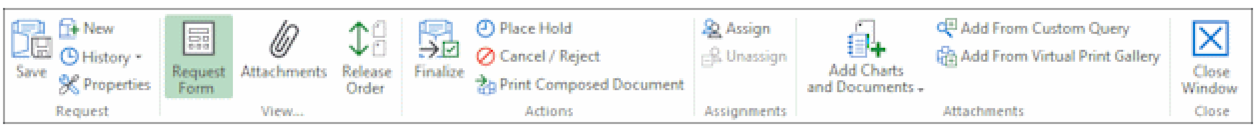


The following buttons are available within the main Release of Information layout.

Button	Description
Refresh	Refreshes the list of displayed requests.
New	Opens a new ROI request.
Open	Opens the selected request.
Search	Toggles the Release of Information layout to display the **Request Search** screen instead of the **Active Requests** list, allowing you to search for requests with any status, Upon clicking the **Search** button, the button is toggled to the **Close Search** button. When clicking the **Close Search** button, the **Request Search** screen is closed, and the **Active Requests** list is displayed.
Properties	Displays the **Properties** pane. When a request is selected, the properties are displayed in this pane.

Button	Description
Assign	Displays the **Assign Request** dialog box for the selected requests, allowing you to assign the selected requests to a user.
Unassign	Unassigns the selected requests from the assigned users.
Print All	Regenerates and prints aged invoices for all eligible requests displayed in the list.
Print Selected	Regenerates and prints aged invoices for selected eligible requests in the list.

Request Layout



The following buttons are available from an open request.

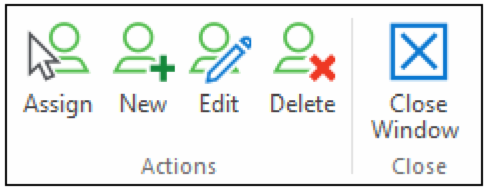
Note: The available buttons displayed within the **Release of Information** ribbon of a request vary depending on a number of factors, including system licensing, the status of the request, user rights, whether the request is assigned to another user, and whether the request is locked. For more information, contact your system administrator.

Button	Description
Save	Saves changes on the request.
New	Opens a new ROI request.
History	When clicking the left portion of the button, displays the Request Log portion of the request history. When clicking the right portion of the button, displays the following buttons: • **Request** - Displays the Request Log portion of the request history. The Request Log records all actions performed on a request. • **Status** - Displays the Status Log portion of the request history. The Status Log records all status changes of a request.
Properties	Displays the **Properties** dialog box, which lists information for the request.
Authorization Form	Displays the authorization form for the request, if the request was generated using the **Create Release of Information Request** Workflow action. **Note:** This button is only available when your system is licensed for Workflow and the request was created using Workflow.

Button	Description
Request Form	Displays the request form for the request.
Attachments	Displays the **Attachments** list for the request.
Release Order	Displays the **Release Order** list for the request.
Finalize	Finalizes the request. Depending on licensing and system configuration, the request packet may be generated. If approval is required, the request must be approved prior to the request packet being generated.
Approve	Approves the request, which then allows the request packet can be generated.
Return to Submitter	Displays the **Return Request to Submitter** dialog box, which prompts you to provide a reason why you are returning the request.
Mark as Payment Received	Displays the **Mark as Payment Received** dialog box, which allows you to record payment from a requester and apply it to the remaining balance of the request.
Print Invoice	Displays the **Print Invoice** dialog box, which lists each applicable pricing policy rule and external item for the request. Here, you can view the current cost of the request and adjust it as needed. After clicking **OK**, you are prompted to print the invoice.
Mark as Billed	Displays the **Mark as Billed** dialog box, which lists each applicable pricing policy rule and external item for the request. Here, you can view the current cost of the request and adjust it as needed.
Packet Preview	Displays the generated request packet, which contains all documents attached to the request.
Print Request	Prompts you to print the request. When printing a request, you are printing the generated request packet (if applicable), as well as any documents that are automatically generated based on the selected Request Type.
Save To File	Allows you to save the request to file. When saving a request to file, you are saving the generated request packet (if applicable), as well as any documents that are automatically generated based on the selected Request Type.
Place Hold	Places a hold on the request, where the request becomes read-only and the time worked on the request is paused. Upon clicking the **Place Hold** button, it is toggled to the **Remove Hold** button. When clicking the **Remove Hold** button, the hold is removed, and request can once again be edited. **Note:** This button is only available when using ROI in standard mode.
Retry Packet Creation	Re-queues the request for packet generation after packet generation has failed.

Button	Description
Revert to Initiated	Reverts a request to its initial status. This does not remove information, attachments, or payments from the request.
Cancel / Reject	In standard mode, opens the **Cancel / Reject Request** dialog box, allowing you to cancel or reject the request. In integrated mode, opens the **Cancel Request** dialog box, allowing you to cancel the request.
Print Composed Document	Displays the **Print Composed Document** dialog box, allowing you to compose and print a document using a configured template.
Assign	Displays the **Assign Request** dialog box, allowing you to assign the request to a user.
Unassign	Unassigns the request from the assigned user.
Add Charts and Documents	Displays the **Add Attachments** wizard, allowing you to attach charts and documents to the request.
Add From Custom Query	Displays the **Add From Custom Query** dialog box, allowing you to attach documents to the request using a Custom Query.
Add From Virtual Print Gallery	Displays the Add From **Virtual Print Gallery** dialog box, allowing you to attach to a request documents printed with the Virtual Print Driver. **Note:** This button is only available when your system is licensed for Virtual Print Driver.
Retrieve External Documents	Starts the process to retrieve external system documents contained within the attached Document Types. Upon clicking the **Retrieve External Documents** button, it is toggled to the **Stop Retrieval Process** button. When clicking the **Stop Retrieval Process** button, the external system document retrieval process is stopped. **Note:** This button is only available when your system is licensed for Report Capture for Meditech.
Restore	Allows work to resume on a rejected request. Once clicked, the request is restored, and it can now be accessed from the **Active Requests** list.
Restore and Assign	Displays the **Assign Request** dialog box, allowing you to assign the rejected request to a user. Once the request is assigned, the request is restored, and it can now be accessed from the **Active Requests** list.
Close Window	Closes the request. If you have unsaved changes, you are prompted to save them.

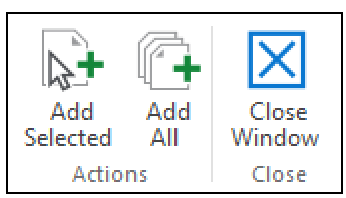
Requester Lookup Dialog Box



The following buttons are available from the **Requester Lookup** dialog box.

Button	Description
Assign	Assigns the requester to the request. The requester information is populated into the Request Form.
New	Displays the **Create Requester** dialog box, which allows you to add and save information for a new requester.
Edit	Displays the **Edit Requester** dialog box, which allows you to edit existing information for a requester.
Delete	Deletes the existing requester.
Close Window	Closes the **Requester Lookup** dialog box.

Add From Custom Query Dialog Box



The following buttons are available from the **Add From Custom Query** dialog box.

Button	Description
Add Selected	Attaches the selected documents to the request.
Add All	Attaches all documents in the results list to the request.
Close Window	Closes the **Add From Custom Query** dialog box.

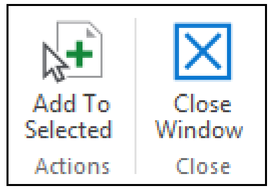
Add From Virtual Print Gallery Dialog Box

The following buttons are available from the **Add From Virtual Print Gallery** dialog box.

Note: The **Add From Virtual Print Gallery** dialog box is only available when your system is licensed for Virtual Print Driver.

Button	Description
Refresh	Refreshes the **Available Documents** list in the Virtual Print Gallery.
Select All	Selects all displayed documents in the **Available Documents** list.
Clear Selection	Deselects any selected documents in the **Available Documents** list.
Move to Request	Attaches the selected documents to the request and removes them from the **Available Documents** list. The documents are no longer available to other users.
Copy to Request	Attaches the selected documents to the request. The documents remain in the **Available Documents** list and are available to other users.
Remove From Gallery	Removes the selected documents from the **Available Documents** list. The documents are no longer available to other users.
Thumbnail Size	Determines the size of the thumbnails displayed in the **Available Documents** list. When you click this button, you can choose from **Small**, **Medium**, or **Large**.
Zoom Thumbnails	Toggles whether thumbnails are zoomed in while hovering the mouse over them. If this button is enabled, resting your pointer over a thumbnail will display a zoomed-in view of the thumbnail. The zoom percentage is determined by the thumbnail size For example, the zoom is greater when the thumbnail size is **Large** instead of **Medium**. If this button is disabled, resting your pointer over a thumbnail will display a tooltip containing information about the document.
Close Window	Closes the **Add From Virtual Print Gallery** dialog box.

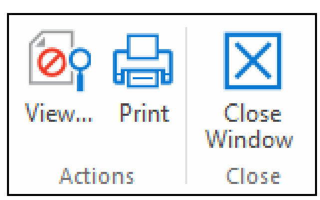
Document Viewer Dialog Box (via Virtual Print Gallery)



The following buttons are available from the **Document Viewer** dialog box when opening a document from the Virtual Print Gallery.

Button	Description
Add To Selected	Adds the document to the list of selected documents awaiting to be attached to a request. This button is only displayed when the document isn't selected to be attached to the request.
Remove From Selected	Removes the document from the list of selected documents awaiting to be attached to a request. This button is only displayed when the document is selected to be attached to the request.
Close Window	Closes the **Document Viewer** dialog box.

Rejections Dialog Box



The following buttons are available from the **Rejections** dialog box.

Button	Description
View	Displays the **Print Rejection Letter** dialog box, which displays the rejection letter associated with the rejection. From there, you can also print the rejection letter.
Print	Prompts you to print the rejection letter associated with the rejection.
Close Window	Closes the **Rejections** dialog box.