OnBase®
Foundation EP5

Signature Deficiencies for Epic

Reference Guide

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Copyright

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Overview

Signature Deficiencies for Epic provides the ability to electronically assign and complete deficiencies on documents stored in OnBase. Analysts can view documents and assign deficiencies to physicians, and physicians can accept or decline these deficiencies. Signature Deficiencies for Epic automatically routes the documents through the completion process.

Signature Deficiencies for Epic integrates seamlessly with the Epic® application. Documents stored in OnBase are retrieved directly through the Epic user interface.

- From the Epic Health Information Management module, analysts can review scanned documents through the OnBase viewer to assign deficiencies for missing signatures or missing information.
- From the Epic In Basket, physicians can retrieve documents and electronically sign deficiencies assigned by the analyst.

Signature Deficiencies for Epic allows users to open OnBase documents from the Epic application without interactively logging on to OnBase. Analysts and physicians can analyze and complete encounter documents without leaving the Epic interface.

Note: Deficiencies can only be completed using image documents and not other file formats.

Analyst Workflow

A patient encounter generates documents, which are scanned into OnBase. As the documents are indexed, OnBase sends an HL7 message to Epic to register the document with the patient encounter. The analyst accesses and views the document through Epic using the OnBase Analysis window. From the Analysis window, the analyst creates and assigns deficiencies to individual physicians. When the analyst finishes creating and assigning deficiencies, notifications are sent to the assigned physicians' In Basket.

Document Corrections

At any point during Analysis, the analyst can submit a document for corrections.

The document correction process allows users to submit medical documents to OnBase Workflow, where HIM staff can re-index or correct the documents as needed. This process offers the following benefits:

- Corrections are centralized. All documents that need to be corrected are accessible through OnBase Workflow.
- Correction-related privileges are limited to a small subset of users. Other users can submit documents for corrections as needed, but only users who should be allowed elevated privileges will be able to perform the corrections.

- OnBase remains synchronized with external EMR systems. When a document is created, modified, or deleted in OnBase, OnBase can send an HL7 message notifying the EMR system of the event.

Physician Workflow

A notification is sent to a physician's In Basket for each document that requires a signature or more information. From the In Basket, the physician can open a document in the OnBase Signing window. From the Signing window, physicians can view assigned deficiencies and accept or decline each one.

- When a physician signs a document, the signature is burned onto the document, and the document is revised in OnBase.
- When a physician provides missing information, the provided information and the physician's signature are burned onto the document, and the document is revised in OnBase.
- When a physician declines a deficiency, the physician provides a reason for declining, and the document is sent back for Reanalysis. The analyst can view the reason provided and either remove or reassign the deficiency as needed.

Epic and OnBase Application Enabler

Although Application Enabler is capable of integrating with Epic applications, Epic Systems and the makers of OnBase discourage the use of Application Enabler with Epic. OnBase windows opened using Application Enabler do not respond to the switching of users or patient contexts within Epic. Therefore, the possibility exists that a previously launched OnBase window may remain open and display incorrect information for the current context in Epic. Additionally, Epic upgrades may introduce changes that invalidate Application Enabler's configuration and pose a risk to patient safety.

To integrate Epic and OnBase, use the OnBase integrations for Epic. These integrations have been developed specifically for use with Epic applications, and they resolve these possible issues of patient safety. If the existing integrations do not provide the functionality needed for your solution, contact your solution provider to determine how your business needs can be met and to request any necessary enhancements.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Signature Deficiencies for Epic 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 Signature Deficiencies for Epic functionality:

- Signature Deficiencies for Epic
- HL7 Listener or Basic HL7 Listener

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

Legacy Licensing

Signature Deficiencies for Epic requires the following licenses:

- Signature Deficiencies for Epic
- An OnBase Client license for all users accessing the Client or Configuration module
- HL7 Listener or Basic HL7 Listener

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

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Additional Resources

The following sections describe how to install Signature Deficiencies for Epic. For more information, please refer to the following additional resources:

- Configuring Epic for OnBase. The **Configuring Epic for OnBase** guide explains the settings required in Epic for OnBase integrations and workflows. If you are a current Epic customer, you can request this guide from Hyland through your first line of support.
- Supplemental Installation and Upgrade Guides. Installation files and procedures vary depending on your build of OnBase. For the latest file installation information, see the **Supplemental Installation and Upgrade Guide for Epic Integrations** module reference guides, available on Hyland Community at https://community.hyland.com/products/onbase/integration-for-epic/resources.

Requirements

See the following topics for requirement information:

- General Requirements on page 5
- Microsoft Visual C++ Runtime Requirements on page 6
- Compatible Epic Versions on page 6
- Licensing on page 6

The following sections outline requirement information specific to Signature Deficiencies for Epic in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Signature Deficiencies for Epic and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Supported Desktop Operating Systems, see the **Web/Application Server** table column
- 32-Bit Server Hardware Requirements
- Server Browser Requirements
- Databases Supported
- Database/File Servers

- Database Client / Server Version Compatibility

Note: The OnBase Client and Configuration modules require an ODBC connection to the OnBase database.

- Microsoft .NET Framework Requirements

Note: The .NET Framework requirement applies to the OnBase Application Server, client workstations running Signature Deficiencies for Epic, and the Hyland Integration for Epic installer.

- Server C++ Requirements

Microsoft Visual C++ Runtime Requirements

One or more versions of the Microsoft Visual C++ Redistributable Package are required. If not already present on your system, the required packages are installed when the **setup.exe** installer is used to install this module.

Client Workstation Visual C++ Runtime Requirements

Signature Deficiencies for Epic requires the Microsoft Visual C++ 2012 Redistributable Package (x86) and Microsoft Visual C++ 2019 Redistributable Package (x86) to be installed on client workstations.

Compatible Epic Versions

Signature Deficiencies for Epic requires the Epic HIM application with the Chart Deficiency module. You can use Signature Deficiencies for Epic with the following Epic versions:

- Epic August 2018 and later
- Epic February 2018
- Epic 2017
- Epic 2015

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.

Integration for Epic Upgrade Considerations

The following information should be considered or noted when upgrading Integration for Epic deployments. Read this information prior to upgrading your version of OnBase.

General Deployment Considerations — The following guidelines are considered best practices for upgrading the Integration for Epic:

- Beginning in OnBase EP3, when configuring authentication, the **Epic Encryption Key** must be a 32-byte Base64-encoded value when using an AES 256 encryption key size. For more information on configuring this setting, see the section on configuring encryption settings for URL integrations in the **Integration for Epic** module reference guide.
- Beginning in OnBase 18, the logic used to create user accounts via Epic authentication differs from previous versions. If you are upgrading from a version of OnBase prior to OnBase 18, contact your first line of support to determine whether any additional steps are needed to update existing user accounts.
- All previous integration files should be unregistered (if necessary) and removed.
  - For OnBase 12 and later, use the MSI for the installed version of OnBase to uninstall the integration components.
  - For file and registration information in OnBase 11.0 and earlier, check the **Integration for Epic** or **Signature Deficiencies for Epic** module reference guide for the version of OnBase being upgraded.
- When upgrading both OnBase and Epic, perform the OnBase upgrade before you upgrade your Epic system.
- When upgrading to a new build of OnBase, also upgrade all OnBase Application Servers used by the Epic integration. Upgrading to a new build will not require changes to the OnBase database or other aspects of the OnBase environment.
- When upgrading OnBase, use the latest build available for the new OnBase version.

Web Considerations — The following should be considered with regard to OnBase web applications that integrate with Epic, such as DocPop and OnBase Patient Window:

- When upgrading to the OnBase Web Viewer from the legacy ActiveX-based OnBase Viewer, you must update any Document Corrections E-form templates to use the **OBBtn_SaveAndClose** button for these forms to function properly in the OnBase Web Viewer. For more information on configuring Document Correction E-form templates, see the topic on form template configuration in the **Integration for Epic** documentation.
- As of OnBase Foundation EP3, the Epic ROI Web Service is not compatible with multiple OnBase systems integrating with one Epic system. If your system is currently configured to use multiple OnBase systems with one Epic system and you are upgrading your OnBase system to use the Epic ROI Web Service from the legacy Epic ROI Printer Plug-In integration, contact your first line of support for assistance.
- As of OnBase Foundation EP1, Epic encryption settings for OnBase web applications must be configured in OnBase Configuration under **Utils | External Systems**. The **PopChecksumKey**, **EpicAuthenticationType**, **DPChecksum**, and **DPEncryptionType** web.config settings are no longer used for Epic authentication.
- As of OnBase Foundation EP1, the **epicTimestamp** parameter must be included in the encrypted query string used to launch an integrated web application. Timestamps are used for validation. If a user’s session times out, the user must re-launch the web application from Epic in order to log back in.
- As of OnBase 18, the Epic integrations no longer support RC4 encryption. If you are upgrading from a version of OnBase prior to OnBase 18, be sure to update the Epic encryption settings for web applications integrated with Epic. Also make sure Epic is using a supported encryption type.

Mobile Considerations — The following should be considered with regard to the integrations for Epic Canto or Epic Haiku:

- As of OnBase Foundation EP3, the **DPEncryptionType** and **DPCheckSum** settings are no longer used. The Mobile Applications Broker Server Web.config file must be updated to use the **EpicIntegration** setting.
- As of OnBase 18, the Epic integrations do not support **RC4** as a value for **DPEncryptionType**. Be sure to update the Web.config file to use a supported encryption type. The Epic applications also must be updated to use the specified encryption type.

- If upgrading from OnBase 16 SP1 or earlier, take note of the value for the following key. This key value will be used to populate the MedicalEncounterKeywordID in the web.config file for the new OnBase version. As of OnBase 16 SP2, the MedicalEncounterKeywordID key replaces the DefaultKeywordID key.
  - <add key="DefaultKeywordID" value="" />
- If upgrading from OnBase 16 SP2 or later, take note of the values for the following keys:
  - <add key="MedicalEncounterKeywordID" value="" />
  - <add key="MedicalPatientKeywordID" value="" />

Scan Acquisition Server Considerations — The following should be considered with regard to the integrated Scan Acquisition Server:

- If upgrading the Scan Acquisition Server from a version of OnBase prior to OnBase 16, you must update the Scan Acquisition Server ProgID in Epic.
- Back up the EpicIntegrations.config file.

Front Office Scanning Considerations — The following should be considered with regard to the integrated Front Office Scanning client:

- As of OnBase 17 SP 2, the Front Office Scanning client can send Epic a service date, effective date, and received date to be used for all documents included in a single upload. By default, users are prompted to enter these dates when indexing documents. The dates can be disabled using the Epic FOS XML configuration file.
- As of OnBase 17, the Front Office Scanning client can load a different configuration file when scanning is initiated from registration contexts. To take advantage of this feature, you must create and configure the new file (EPICFOSCONFIG.registration.xml). If you do not want to use this feature, then no configuration changes are necessary.
- If upgrading the Front Office Scanning integration from a version of OnBase prior to OnBase 16, you must update the Scan Acquisition Server ProgID in Epic.
- Back up the EPICFOSCONFIG.xml, EPICFOSCONFIG.registration.xml (if applicable), and EpicIntegrations.config files.

Image Retrieval API Considerations — The following should be considered with regard to the Image Retrieval API integration:

- Take note of the domain account used to run the Application Server used by this integration. After upgrading, configure the Application Server to run under this account or another account with the same permissions.

Signature Deficiencies Considerations — The following should be considered with regard to Signature Deficiencies for Epic:

- As of OnBase 18, new settings control the sending of HL7 messages to Epic when deficiencies are created or addressed. These settings are named **Notify Epic of Pending Deficiencies** and **Notify Epic of Completed or Rejected Deficiencies**. They are available on the **HL7** tab in **Medical System Settings**. Both settings are selected by default when the database is upgraded from a version prior to OnBase 18. Neither setting is selected for new database installations.
- As of OnBase 18, Signature Deficiencies for Epic no longer needs to be configured to send HL7 messages to Epic in order for deficiencies to be burned.

- As of OnBase 18, if deficiencies are addressed using the mobile Integration for Epic Canto or Epic Haiku, then the **Notify Epic of Completed or Rejected Deficiencies** setting must be selected, and the associated HL7 message template and destination must be configured.
- Back up the SD4E.txt file.
- Back up the EpicIntegrations.config file.
- Back up the Web.config file of the Application Server used for the Epic integration, ensuring the following key is included:
  - <add key="SD4EConfigLocation" value="{Location of SD4E.txt}" />

EpicCare Link Considerations — The following should be considered with regard to the integration for EpicWeb, EpicCare Link, or PlanLink:

- As of OnBase 16, the EpicWeb.ini file has been replaced by the OnBaseEpicWeb.config file. If upgrading from a version prior to OnBase 16, take note of the settings in EpicWeb.ini. These will be needed to populate the OnBaseEpicWeb.config file.
- If upgrading from OnBase 16 or later, back up the OnBaseEpicWeb.config file.
- If upgrading Epic, take note of the following settings in the Epic.ini file:
  - **MediaHandlerProgIDs**
  - **WebMediaObject** (needed only for Epic 2015 and earlier)
  - **MultipleMediaHandlers** (needed only for Epic 2015 and earlier)
- If upgrading to Epic 2017 or later from Epic 2015 or earlier, remove the following settings from the Epic.ini file:
  - **WebMediaObject**
  - **MultipleMediaHandlers**
- As of OnBase 18, the Hyland Integration for Epic installer does not create the OnBaseEpicWeb.config file. Instead, the installer can copy a pre-configured OnBaseEpicWeb.config file from a specified location to the installation directory. The **DATASOURCE** and **APPLICATION_SERVER_URL** properties are no longer used when the installer MSI is run using the command line.

Installing Server Components

The installation process requires a one-time installation of the OnBase Application Server.

1. Install the OnBase Application Server. See the **Application Server** module reference guide for installation instructions.
2. Ensure required data sources are set up in the Web.config file of the OnBase Application Server.
3. Configure SD4E.txt as described under Configuring SD4E.txt on page 11.

   When you install the Signature Deficiencies server-side files, the installer copies the SD4E.txt file provided with the installer to the Application Server’s root directory.
4. Run the Hyland Integration for Epic installer with **Signature Deficiencies** as the selected server-side component. See Epic Integrations Installer on page 49 for more information.

Configuring SD4E.txt

Signature Deficiencies for Epic will not work without the text file that contains the application's configuration settings. By default, this file is named SD4E.txt and is included with the Hyland Integration for Epic installer.

1. Open the SD4E.txt from the installer folder.
2. Modify or add the configuration settings and their values. See Available Configuration Settings on page 11 for an overview of available options. Ensure the settings and value ares separated by a colon. A space on either side of the colon is optional.

```
cacheLocation : c:\integrations\Epic\cacheFiles
cachePhysicianTime : 2
chartAssigningAuthority : HIM
closeAfterLastDeficiency : false
declineOtherAvailable : false
dumpContextInformation : false
dumpDeficiencyInformation : false
filterPhysiciansByFacility : true
physicianSort : physnumberalpha
rejectionReason1 : Incomplete chart
rejectionReason2 : hidden
```

3. Save the file.

Available Configuration Settings

The following table provides a brief description of settings available for Signature Deficiencies in the SD4E.txt file.

Setting	Description
cacheLocation	Enables local caching of physician locations. This setting specifies the user-defined location where the cache files are stored. For example: **cacheLocation : c:\integrations\Epic\cacheFiles** Use this setting in Citrix environments to allow Citrix servers to share the same cache files across multiple sessions. See Changing the Physician Cache Location on page 234.

Setting	Description
cachePhysicianTime	Enables local caching of available physicians. If your system contains a large number of physicians, caching may improve the application's load time. Enter the number of minutes physicians should remain cached on the client workstation. For example: **cachePhysicianTime : 2** See Caching Available Physicians on page 233.
chartAssigningAuthority	Controls whether the Assigning Authority is used on the chart. If the system is configured to require the Chart Level Assigning Authority, this setting allows the configuration of a single Assigning Authority used to retrieve Epic charts. If the system is not configured to require the Chart Level Assigning Authority, when attempting to retrieve the chart by chtidnumber, one of the following occurs: • If there is only one chart with the chtidnumber, that number is used. • If there is more than one chart with the chtidnumber, then the system fails to find the chart and displays an error message indicating that documents were not found. The value specified must be the chart level assigning authority for Epic charts used in your solution and formatted according to the following guidelines: • Alphanumeric combination • Maximum of 50 characters • All letters in uppercase For example: **chartAssigningAuthority : HIM** See the section on Configuring Assigning Authorities within the **HL7 Module** documentation for more information.
closeAfterLastDeficiency	Controls whether the **Signing** window is automatically closed after the physician's last deficiency is signed. Valid values are **true** and **false**. See Auto-Closing the Physician Signing Window on page 236.
declineOtherAvailable	Controls whether the **Other** decline reason is available when the physician declines a deficiency. Valid values are **true** and **false**. See Enabling the "Other" Decline Reason on page 234.

Setting	Description
dumpContextInformation **dumpDeficiencyInformation**	Controls whether the **Analysis** and **Signing** windows display the information being passed into and out of them. These settings are used for troubleshooting purposes. Valid values for both are **true** and **false**. See Turning on Debug Mode on page 28.
filterPhysiciansByFacility	Controls whether the **Physician** list in the **Analysis** window is filtered to display only physicians who have privileges to treat at the current chart's facility. Valid values are **true** and **false**. See Filtering the Physician List by Facility on page 233.
physicianSort	Controls whether physicians in the **Physician** list are ordered by their Signature Text, numerically by their Physician Numbers, or alphabetically by their Physician Numbers. Valid values are **signaturename**, **physnumbernumeric**, and **physnumberalpha**. If this setting is missing, physicians are ordered alphabetically by full name. **physicianSort : physnumberalpha** See Sorting Physicians in the Analysis Window on page 234.
rejectionReason1 **rejectionReason2** **rejectionReason3** **rejectionReason4**	Used to customize the reasons listed in the **Enter Decline Reason** dialog box. Valid values are the intended text for the decline reason. If the value is **hidden**, the decline reason is not displayed in the dialog box. **rejectionReason1 : Incomplete chart** **rejectionReason2 : hidden** See Customizing Available Decline Reasons on page 235.

Installing Client Components

For information about installing Signature Deficiencies for Epic on client workstations, see the following topics:

- Client-Side File Installation on page 14
- Environment Mapping on page 14

Client-Side File Installation

To install and register the Signature Deficiencies for Epic client-side files, use the Hyland Integration for Epic installer. See Epic Integrations Installer on page 49.

Tip: If you create and configure the EpicIntegrations.config file before running the installer, the installer can copy the file from a directory to the installation location, allowing you to configure the file only once instead of in multiple locations. To configure EpicIntegrations.config, see Environment Mapping on page 14.

Note: For installation file information, see the **Supplemental Installation and Upgrade Guide for Epic Integrations**, available on Hyland Community at https://community.hyland.com/products/onbase/integration-for-epic/resources.

Environment Mapping

You can map each Epic environment ID to a specific OnBase Application Server and data source using EpicIntegrations.config.

EpicIntegrations.config is an XML-based configuration file that resides in the same directory as the OnBase integration DLLs on the client workstation. If your solution includes the OnBase Integration for Epic, then other integration components may also use this file.

You can configure the file either manually or using EpicIntegrations Configuration. See the following topics:

- Environment Mapping Using EpicIntegrations Configuration on page 14
- Manual Environment Mapping on page 19

To allow Signature Deficiencies for Epic to connect to different data sources based on the Epic environment ID, see Connecting to Multiple Data Sources Based on Environment ID on page 22.

Note: When configuring service URLs in the following procedures, use the following format: **http://server/AppServer/service.asmx**

Note: Both HTTP and HTTPS are allowed. You can use the server's hostname or IP address.

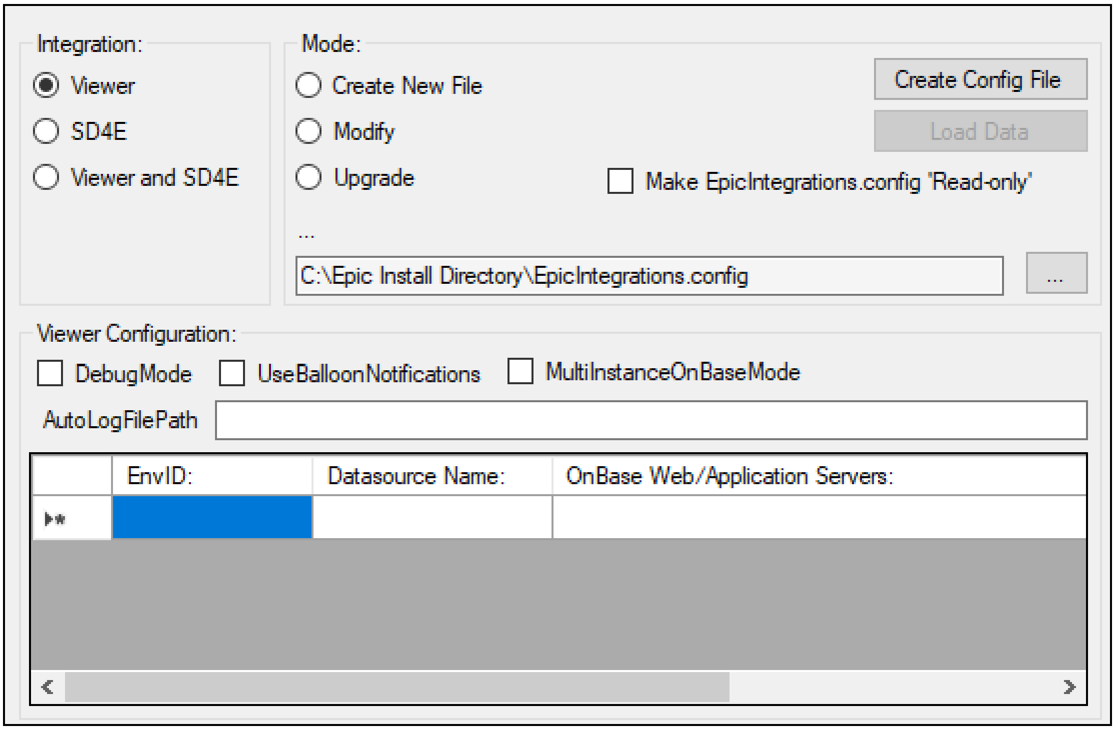
Environment Mapping Using EpicIntegrations Configuration

EpicIntegrations Configuration is a utility that can update and generate a properly formatted EpicIntegrations.config file automatically. The utility is available in the same directory as the Integration for Epic installer.

- For new or existing installations, use EpicIntegrations Configuration to create or modify the EpicIntegrations.config file.
- For upgrades from OnBase 9.2 and earlier, use EpicIntegrations Configuration to create EpicIntegrations.config and populate it with previously configured registry settings.

To configure EpicIntegrations.config manually, see Manual Environment Mapping on page 19.

1. Double-click **EpicConfigFileCreator.exe**. The **EpicIntegrations Configuration** window is displayed.



2. Under **Integration**, select one of the following:
   - **SD4E**—Select if you are deploying only Signature Deficiencies for Epic.
   - **Viewer and SD4E**—Select if both the OnBase Viewer for Epic and Signature Deficiencies for Epic will reside on the same workstation. This option configures an EpicIntegrations.config file that both integrations can use.

Note: The OnBase Viewer for Epic requires an Integration for Epic license.

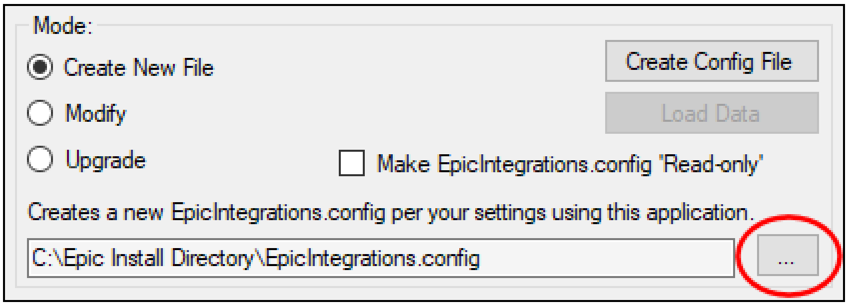
3. Under **Mode**, select one of the following options:

Mode	Description
Create New File	Creates a new EpicIntegrations.config file.
Modify	Loads and lets you modify settings from an existing EpicIntegrations.config.
Upgrade	Upgrades solutions from OnBase 9.2 or earlier. This option creates EpicIntegrations.config using the workstation's existing registry settings.

4. If the EpicIntegrations.config file should be read-only, select the **Make EpicIntegrations.config 'Read-only'** option.

Note: Once you save EpicIntegrations.config as read-only, you will not be able to modify it using EpicConfigFileCreator.exe. To modify a read-only EpicIntegrations.config file, first remove the **Read-only** attribute manually using Windows Explorer.

5. Browse to the location for the EpicIntegrations.config configuration file by clicking the **...** button. You can also type the full path to EpicIntegrations.config instead of browsing.



6. Do one of the following:
   - If you selected **Create New File**, continue to the following topic, SD4E Configuration Settings on page 16.
   - If you selected **Modify**, click the **Load Data** button, and then continue to the following topic, SD4E Configuration Settings on page 16.
   - If you selected **Upgrade**, click **Create Config File**. The EpicIntegrations.config file is created in the specified location.

SD4E Configuration Settings

Complete the following steps to configure the integration's primary data source and environment ID mapping. These steps are not necessary if you are running EpicIntegrations Configuration in **Upgrade** mode.

Note: If you are creating a configuration file for both the OnBase Viewer and Signature Deficiencies for Epic, then you must also configure the **Viewer Configuration** settings as described in the Integration for Epic module reference guide.

1. In the **Datasource Name** field under **SD4E Configuration**, type the name of the data source configured on the Application Server.

Note: This data source is used only if there is no valid data source mapped to the environment ID received from Epic. For information about mapping data sources to environment IDs, see Connecting to Multiple Data Sources Based on Environment ID on page 22.

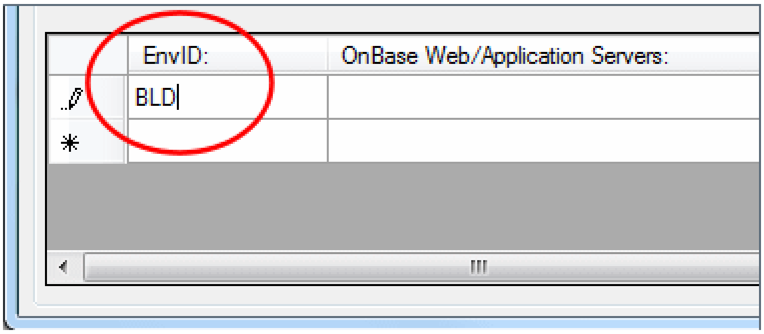
2. Select or clear the following settings as needed:

Setting	Description
FilterPhysiciansBySpecialty	This setting controls whether analysts can search for physicians based on their configured specialty. Select to set the **FilterPhysiciansBySpecialty** setting to **true** in EpicIntegrations.config. If this check box is not selected, **FilterPhysiciansBySpecialty** will be set to **false**, and searching by specialty will not be available in the Analysis window.
MultiInstanceOnBaseMode	This setting controls whether Signature Deficiencies for Epic can retrieve documents from different OnBase systems based on configured Facility IDs. Select to add the **multiInstanceOnBaseMode** setting with a value of **true** to the **<SD4E>** node in EpicIntegrations.config. If this check box is not selected, the **multiInstanceOnBaseMode** setting will not be added. For more information, see Integrating Epic with Multiple OnBase Systems on page 33.

3. Map the Epic environment IDs to the corresponding OnBase servers. At least one mapping must be specified.

   To map an Epic environment ID to the OnBase server:

   a. Select an **EnvID** cell, and then enter or update the environment ID you want to map.

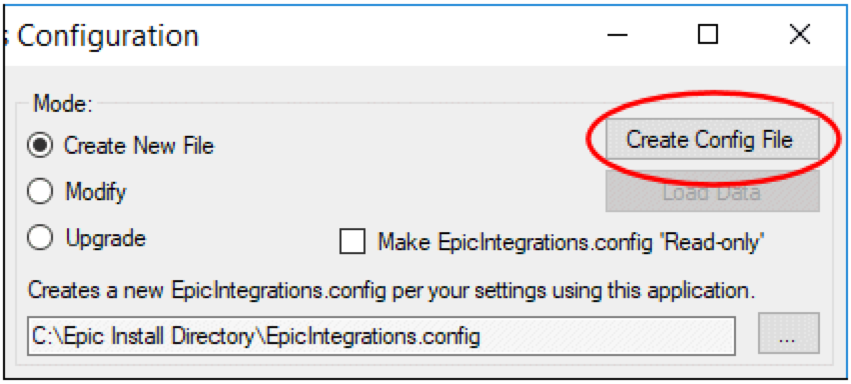


   b. In the adjacent **OnBase Web/Application Servers** cell, enter or edit the path to the OnBase Web or Application Server to use with the specified environment ID. The format is: **http://ServerName/VirtualDirectory/Service.asmx**

Note: Server paths must begin with **http://** or **https://** and end with **/Service.asmx** for EpicIntegrations Configuration to consider them valid.

   c. Repeat for each environment ID.

4. Click the **Create Config File** or **Modify Config File** button (depending on the selected **Mode**). The EpicIntegrations.config file is created or updated in the specified location.



Note: If the environment ID mapping table contains blank rows (excluding the final row), then you must delete these rows before clicking **Create Config File** or **Modify Config File**. Ensure the row marked with an asterisk (*) is the only blank row present. To delete a row, see Deleting an Environment ID Mapping Row on page 18.

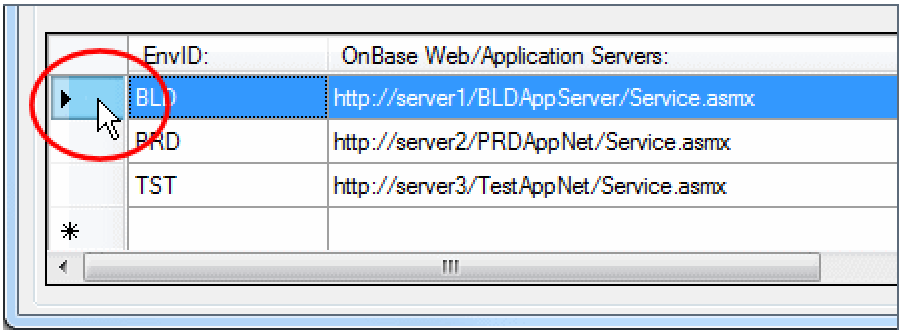
5. Click **OK** when the confirmation message is displayed.
6. When prompted, either click **Yes** to exit EpicIntegrations Configuration, or click **No** to keep the application open.

Deleting an Environment ID Mapping Row

The following procedure describes how to delete a row from the environment ID mapping table in EpicIntegrations Configuration.

1. To delete a row from the table, select the row by clicking the button to the left of the **EnvID** cell.

   The row marked with an asterisk (*) cannot be deleted.



2. Press **Delete**.

Tip: You can also select multiple rows by Ctrl-clicking or by clicking and dragging your pointer over the rows you want to delete.

Manual Environment Mapping

To create or update the EpicIntegrations.config file manually using a text editor, see the following topics:

- Creating a New EpicIntegrations.config on page 19
- Adding Settings to an Existing EpicIntegrations.config on page 20
- Configuring EpicIntegrations.config Settings on page 20

Note: When adding elements to the EpicIntegrations.config file, make sure they are ordered as shown in the following topics. For example, in the **server** element, **environmentID** must be first, followed by **url** and **datasource**.

Creating a New EpicIntegrations.config

To create a new file that will be used only by Signature Deficiencies for Epic, complete these steps:

1. Using a text editor like Notepad, create a file named EpicIntegrations.config.
2. Add the following contents to the file:

```
 <EpicIntegration>
  <SD4E>
    <epicDatasource></epicDatasource>
    <filterPhysiciansBySpecialty></filterPhysiciansBySpecialty>
    <servers>
      <server>
        <environmentID></environmentID>
        <url></url>
        <datasource></datasource>
      </server>
    </servers>
  </SD4E>
</EpicIntegration>
```

3. Save the file and continue to Configuring EpicIntegrations.config Settings on page 20.

Adding Settings to an Existing EpicIntegrations.config

To add Signature Deficiencies for Epic settings to an existing EpicIntegrations.config file, complete these steps:

1. Open EpicIntegrations.config.
2. Above the closing **</EpicIntegration>** tag, add the following:

```
<SD4E>
 <epicDatasource></epicDatasource>
 <filterPhysiciansBySpecialty></filterPhysiciansBySpecialty>
 <servers>
  <server>
   <environmentID></environmentID>
   <url></url>
   <datasource></datasource>
  </server>
 </servers>
</SD4E>
```

3. Save the file and continue to Configuring EpicIntegrations.config Settings on page 20.

Configuring EpicIntegrations.config Settings

To configure Signature Deficiencies for Epic settings, complete these steps:

1. Open EpicIntegrations.config.
2. Between the **epicDatasource** tags, type the name of the OnBase data source configured on the OnBase Application Server.

   For example: <epicDatasource>**DMS**</epicDatasource>

   - This data source is used only if no data source is assigned to the environment ID received from Epic.
   - If the environment ID received from Epic is not mapped to a valid data source and the **epicDatasource** is blank or invalid, the integration uses the data source specified in the mapped Application Server's Web.config.
3. Between the **filterPhysiciansBySpecialty** tags, type one of the following:
   - **true**—Set to allow analysts to find physicians by specialty.
   - **false**—Set to remove the option of searching by specialty from the Analysis window.

   For example: <filterPhysiciansBySpecialty>**true**</filterPhysiciansBySpecialty>

   If no valid value is specified, this setting is treated as **false**.
4. Between the **environmentID** tags under **<server>**, type the Epic environment ID you want to map to a specific Application Server.

   For example: <environmentID>**PRD**</environmentID>
5. Between the **url** tags, type the service path for the OnBase Application Server you are mapping to the environment ID.

   For example: <url>**http://server/appserver/Service.asmx**</url>

6. Between the **datasource** tags (if present), type the name of the data source that should be used with this environment ID. Make sure the value matches the data source name configured on the specified server.

   For example: <datasource>**ProdDMS**</datasource>

   - The **datasource** element allows each environment ID to be mapped to a different data source. If the **datasource** element is absent, you can add it directly under the **url** tags within the **server** element.
   - If the **datasource** element is absent, blank, or invalid, Signature Deficiencies for Epic will use the configured **epicDatasource** value.
   - If the **epicDatasource** value is blank or invalid, Signature Deficiencies for Epic will use the **dmsdatasource** value configured in the Web.config of the Application Server mapped to the environment ID.
7. To map additional environment IDs to specific Application Servers, do the following:

   a. Copy the entire **server** element (from the opening **<server>** tag through the closing **</server>** tag).

```
<EpicIntegration>
  <SD4E>
    <epicDatasource>DMS</epicDatasource>
    <filterPhysiciansBySpecialty>true</filterPhysiciansBySpecialty>
    <servers>
      <server>
        <environmentID>PRD</environmentID>
        <url>http://ProdServer/AppServer/Service.asmx</url>
        <datasource>ProdDMS</datasource>
      </server>
    </servers>
  </SD4E>
</EpicIntegration>
```

   b. Paste the copied **server** element between the closing **</server>** and **</servers>** tags.

   c. Configure the environment ID and Application Server URL as described in steps 4 and 6.

   d. Repeat these steps for each environment as needed.

Note: If the data source or environment ID contains a **<**, **>**, or **&**, then the value must be enclosed within a **<![CDATA[ ]]>** section. Otherwise, the CDATA tags can be omitted. For example, if the environment ID is X&Y, then the **environmentID** element would use the following format: **<environmentID><![CDATA[**X&Y**]]></environmentID>**.

8. Save EpicIntegrations.config. When you are finished, the file might resemble the following:

```
<EpicIntegration>
  <SD4E>
    <epicDatasource>DMS</epicDatasource>
    <filterPhysiciansBySpecialty>true</filterPhysiciansBySpecialty>
    <servers>
      <server>
        <environmentID>PRD</environmentID>
        <url>http://ProdServer/AppServer/Service.asmx</url>
        <datasource>ProdDMS</datasource>
      </server>
      <server>
        <environmentID>TST</environmentID>
        <url>http://TestServer/AppServer/Service.asmx</url>
        <datasource>TestDMS</datasource>
      </server>
    </servers>
  </SD4E>
</EpicIntegration>
```

Connecting to Multiple Data Sources Based on Environment ID

Signature Deficiencies for Epic can connect to different data sources depending on the environment ID received from Epic. Complete the following steps to map data sources to environment IDs using EpicIntegrations.config.

If Signature Deficiencies for Epic needs to connect to different data sources under the same environment ID, see Integrating Epic with Multiple OnBase Systems on page 33.

1. Open EpicIntegrations.config.
2. Locate the environment ID you want to map to a specific data source.

3. If necessary, add a **<datasource>** element under the **<url>** element for that environment ID.

   For example: <datasource></datasource>

```xml
<EpicIntegration>
  <SD4E>
    <epicDatasource>DMS</epicDatasource>
    <filterPhysiciansBySpecialty>true</filterPhysiciansBySpecialty>
    <servers>
      <server>
        <environmentID>PRD</environmentID>
        <url>http://ProdServer/AppServer/Service.asmx</url>
        <datasource></datasource>
      </server>
    <servers>
      <server>
        <environmentID>TST</environmentID>
        <url>http://TestServer/AppServer/Service.asmx</url>
      </server>
    </servers>
  </SD4E>
</EpicIntegration>
```

4. Between the **datasource** tags, type the name of the data source that should be used with this environment ID. Make sure the value matches the data source name configured on the specified server.

   For example: <datasource>**ProdDMS**</datasource>

   - If the **datasource** element is absent, blank, or invalid, Signature Deficiencies for Epic will use the **epicDatasource** value (also configured in EpicIntegrations.config).
   - If the **epicDatasource** value is blank or invalid, Signature Deficiencies for Epic will use the **dmsdatasource** value configured in the Web.config of the Application Server mapped to the environment ID.

5. Repeat steps 2–4 for each environment ID. When you are finished, the file might resemble the following:

```
<EpicIntegration>
  <SD4E>
    <epicDatasource>DMS</epicDatasource>
    <filterPhysiciansBySpecialty>true</filterPhysiciansBySpecialty>
    <servers>
      <server>
        <environmentID>PRD</environmentID>
        <url>http://ProdServer/AppServer/Service.asmx</url>
        <datasource>ProdDMS</datasource>
      </server>
      <server>
        <environmentID>TST</environmentID>
        <url>http://TestServer/AppServer/Service.asmx</url>
        <datasource>TestDMS</datasource>
      </server>
    </servers>
  </SD4E>
</EpicIntegration>
```

6. Save EpicIntegrations.config.

Epic Configuration

Most Epic modules require additional configuration to integrate with OnBase. Requirements vary depending on the design of the solution. For information about configuring Epic for OnBase, contact your solution provider.

The OnBase components for integrated analysis and signing have specific ProgIDs, which may need to be updated in Epic when either Epic or OnBase is upgraded. These ProgIDs must be configured in an LWP record. See the following table for more information.

Note: In this table, **Xx** represents the version of Epic. For example, for Epic 2017, the **Xx** would be **83**. For Epic February 2018, it would be **84**.

LWP Attribute	Value
ProgID of Scan Analyst Module	SignatureDeficienciesForEpic.SDEpicAnalysisHost**Xx**
ProgID of Scan Provider Signature Module	SignatureDeficienciesForEpic.SDEpicSigningHost**Xx**

OnBase Client Analysis Server

A server must be running the OnBase Client module with the -EPICANALYSIS command line switch to perform the following functions:

- Determine whether deficiencies have been created, completed, or modified on any documents.
- Burn deficiencies and standard notes onto documents.
- Trigger HL7 messages containing deficiency status information, if OnBase is configured to send Epic deficiency status updates using HL7.

  HL7 settings are configured on the **HL7** tab under **Medical | Medical System Settings**. For more information, see HL7 Settings on page 213.

For information about adding a command line switch, see Command Line Switches on page 25. For a description of the steps performed by the -EPICANALYSIS server, see OnBase Client Servers on page 121.

Application Server Web.config Settings

The Application Server's Web.config file contains one setting specific to Signature Deficiencies for Epic:

SD4EConfigLocation

SD4EConfigLocation specifies the full path to the Signature Deficiencies text file, which contains configuration information for the Signature Deficiencies for Epic module. If the file is moved or renamed, the **SD4EConfigLocation** must be updated.

By default, this setting is not included in the Application Server's Web.config file.

Command Line Switches

Command line switches are arguments attached to the run statement in the shortcut to the OnBase Client or Configuration module which modify the way the module logs on or processes data. The general format of a switch is **-SWITCHNAME="OPTIONAL PARAMETERS"**. Switches are case sensitive. Optional parameters must be enclosed in double quotes (" ").

Applying a Command Line Switch via a Desktop Shortcut

The most common way to add and apply a command line switch is to modify a shortcut to the OnBase Client or Configuration module executable.

Note: In some OnBase deployments, adding command line switches via a desktop shortcut is not a viable option. For information on other methods of applying command line switches, see the **System Administration** module reference guide or help file.

To add a command line switch from a desktop shortcut:

1. Create a shortcut to the OnBase Client or Configuration module.
2. In the **Target** field, add one space after the path to the module's executable file.
3. Add the desired command line switches to the value of the **Target** field. Separate multiple switches with one space.

Note: Some switches do not need to be preceded with a - (dash). For example, the automatic login switch (-AL) contains the dash, the user name (UN) and password (PW) switches do not.

4. The switch is applied to the executable the next time it is launched from the desktop shortcut.

Signature Deficiencies for Epic Command Line Switches

The following command line switches apply to the Signature Deficiencies for Epic module.

-EPICANALYSIS

Charts are created by an HL7 message whose Import Process is configured to **Create Medical Chart**. Once the chart is created, documents entering OnBase will be assigned to the chart based upon Keyword Values.

When applied as a switch, **-EPICANALYSIS** creates a server that routes documents through analysis and completion. When all document deficiencies have been completed, the **-EPICANALYSIS** server burns the deficiencies and notes permanently to the document. A new revision or rendition will be created for the document even if its Document Type does not allow multiple revisions or renditions.

- An image file format document will have a new revision added.
- A text document will have an image file format rendition created as a new revision.
- Notes/deficiencies/annotations will be deleted that are on previous revisions of the document and are not setup to be on all revisions.

-MRMSINSTALL

Apply the **-MRMSINSTALL** switch to the Configuration module command line to be able to delete the following configuration items:

- Admit Type
- Medical Facility
- Clinical Document Tabs
- Medical Department
- Non-Physician Groups
- Payors
- Service Types
- Physician Information (for deleting a physician or assigning a different user account to an existing physician)

- Physician Medical Group

Caution: This feature is intended for recently created items have not been used during the life of the installation. It is not intended to be used on items that were in use but have fallen out of use by the customer. Those items should either be renamed or ignored but not deleted. It is the user's responsibility to remove all related records in other aspects of the Medical Records configuration.

The **-MRMSINSTALL** switch also allows you to edit the following:

- The **Friendly Name** configured for assigning authorities
- The **HL7 Code** and **Assigning Authority** configured for location codes, personnel codes, and confidentiality codes
- The banner for OnBase Patient Window.

Password

A password is required for using this feature. Contact a Technical Support representative for assistance with this feature.

User Group Configuration Rights

In addition to the **-MRMSINSTALL** switch and the password, the user must belong to a User Group that has Medical Records selected for Configuration Rights in order to be able to delete items from the above configurations.

-MRMSLOGGING

When applied, the **-MRMSLOGGING** command line switch instructs the following medical records servers to log messages to the **Thick Client Verbose** tab in the Diagnostics Console:

- MRMS Analysis Server (**-MRMSANALYSIS)**
- MRMS Closure Server (**-MRMSCLOSURE="hh:mm"**)
- MRMS Deficiency Polling Service (**-MRMSPOLL="#"**)
- MRMS Delinquency Letters Server (**-MRMSDELINQUENCYLETTERS**)
- MRMS Delinquency Server (**-MRMSDELINQUENCY="hh:mm"**)
- Signature Deficiencies for Epic Analysis Server (**-EPICANALYSIS**)

The Diagnostics Console must be configured to log Thick Client Verbose messages. For information about enabling Thick Client Verbose logging in the Diagnostics Console, see the Diagnostics Service and Diagnostics Console documentation.

Note: The OnBase Client does not need to run in verbose mode for medical records server information to be logged.

Troubleshooting

See the following topics for Signature Deficiencies for Epic troubleshooting information.

- Turning on Debug Mode on page 28
- Error Messages and Errors on page 28
- Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays on page 30
- Burning Administration on page 31

Turning on Debug Mode

You can configure Signature Deficiencies for Epic to display the information that is being passed into and out of the Analysis and Signing applications as well as a description of any errors encountered as information is transferred. Apply these configuration settings only under the instruction of a Technical Support representative. Disable the settings or remove them when the necessary information has been gathered.

1. Open the SD4E.txt configuration file that was created on page 11.
2. Add one or both of the following settings as instructed:

   ```
   dumpContextInformation : true
   dumpDeficiencyInformation : true
   ```

   Set **dumpContextInformation** to **true** if you want Signature Deficiencies for Epic to display the information that is being passed into the Analysis or Signing module.

   Set **dumpDeficiencyInformation** to **true** if you want Signature Deficiencies for Epic to display the information that is being passed out of the Analysis or Signing module.

Note: Settings and their values must be separated by a colon.

3. Save the SD4E.txt configuration file.

Error Messages and Errors

The following topics describe error messages related to Signature Deficiencies for Epic.

<Blank error message>

When a user clicks **Analyze Scans** to access the Analysis window, the following dialog box may be displayed:

This error may indicate there are earlier versions of SDEpicAnalysis.dll and SDEpicSigning.dll installed on the workstation. To resolve this issue, search the workstation for all instances of these files. If earlier versions are found, delete them. To ensure the deletion takes effect, you may need to restart the workstation after deleting the files.

Database error processing HL7 outbound message

This message may be displayed in the HL7 Event Log when a message is requeued for the HL7 Auto-Sender. For more information about the error's conditions, see Error creating context for sending HL7 message on page 29.

Doc ID <doc id> -Error saving data: No matching document

This message may be displayed after an Epic user clicks **Analyze Scans** and the **No documents found for chart # message** is displayed:

- Scan Signature Analysis
  Doc ID <doc id> -Error saving data: No matching document

This error message from Epic indicates that there is still work to be done on the related chart. The API sent from OnBase to Epic sends all document handles that are part of the chart, even if the link between the documents and the chart has not been created yet in Epic. As a result, Epic is not aware of these documents yet.

The document handles referenced in the error message are still waiting to be committed in OnBase. When they are committed, OnBase will send an HL7 message to Epic to associate the documents with the chart.

Error creating context for sending HL7 message

This message is displayed in the HL7 Event Log when you try to re-send an HL7 message for a deficiency that has been burned onto a document. This issue occurs under the following conditions:

- The deficiency is the only one on the document.
- The HL7 Auto-Sender could not reach the Epic server at the time of burning.

Because the Epic server is not available, the message is logged to the HL7 Event Log as **Failed (Error, destination machine not accessible)**.

Attempting to re-send the HL7 message results in an error because the message references deficiency information that has been removed after the deficiency is burned onto the document.

No additional action is required to address this issue. The deficiency's information is synchronized with Epic even though the HL7 update notification is not sent.

No config settings received

When a user clicks **Analyze Scans** in Epic, the following error may be displayed:

- No config settings received. Verify that the location of the configuration file on the app server is correct.

This error indicates Signature Deficiencies for Epic cannot find the file containing the module's configuration settings. To resolve this issue:

1. Ensure the SD4E.txt configuration file exists and is configured as described under Configuring SD4E.txt on page 11.
2. Ensure the Application Server's Web.config file has been modified to specify the location of the SD4E.txt configuration file. See SD4EConfigLocation on page 25.

No documents found for chart # <chart number>

Users may be unable to access the Analysis window if there are no documents on a chart. When this occurs, the following error is displayed:

- No documents found for chart # <chart number>

This error may occur for several reasons:

- The documents are not yet assigned to the chart in OnBase. For information about resolving chartless documents, see Assigning Chartless Documents to Charts on page 241.
- The chart's facility has one or more Document Types assigned to an Analyst tab, but none of the documents in the chart belong to these Document Types. If a facility has an Analyst tab configured with one or more Document Types, then only the documents belonging to the Analyst tab will show up in the Analysis window. See Clinical Document Tab Configuration on page 164.

If the documents are currently associated with OnBase charts, but this error message is still displayed, see Doc ID <doc id> -Error saving data: No matching document on page 29.

Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays

Notes, redactions, burned markups, and deficiencies on documents that have an overlay applied may encounter unexpected behavior. The position of notes, redactions, burned markups, and deficiencies may shift when the document is rendered.

The position shift may occur in the following instances:

- Text documents that contain overlays with an offset configured
- Text documents accessed using modules that render text documents as an image for display
- Image documents with overlays that do not have the same DPI or dimensions as the document

Caution: If a redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected. Saving or signing the document will permanently place the redaction, burned markup, or deficiency in the shifted position. In some instances, the location of a signature can only be changed by a system administrator.

When setting up overlays for documents that may also include notes, redactions, burned markups, or deficiencies:

- Ensure the dimensions of the overlay match the dimensions of the document.
- Do not use offsets with overlays since the document may contain notes, redactions, burned markups, or deficiencies.
- For text documents, use 96 DPI for overlays.
- For image documents, ensure the DPI of the overlay matches the DPI of the document.

A position shift can be corrected through the following methods:

- For text documents, recreate the overlay to match the dimensions of the document instead of using an offset. For example, add an empty space to the margin of the overlay instead of using an offset to account for this space.
- For text documents, the best practice is to set the DPI of the overlay to 96 DPI. Some OnBase modules render text documents as an image for display, and in most cases, the image is rendered at 96 DPI.
- For image documents, recreate the overlay to match the DPI and dimensions of the document.

If the issue still occurs, contact your first line of support.

Burning Administration

If a deficiency cannot be burned (for example, due to a configuration error), the Analysis server logs an error message describing the issue. To identify and address these errors, use the Burning Admin layout in the Medical Records Unity Client.

To access the Burning Admin layout, you must have the **Burning** medical records privilege. This privilege is available on the **Administration** tab in the **Medical Records Privileges** dialog box.

For information about using the Burning Admin layout to address burn errors, see the **Medical Records Unity Client** module reference guide.

To configure the Analysis server to notify an administrator when burning fails due to a disk group or temp file error, configure the **Burn Failure Notification User** in OnBase Configuration under **Medical | Medical System Settings**.

Contacting Support

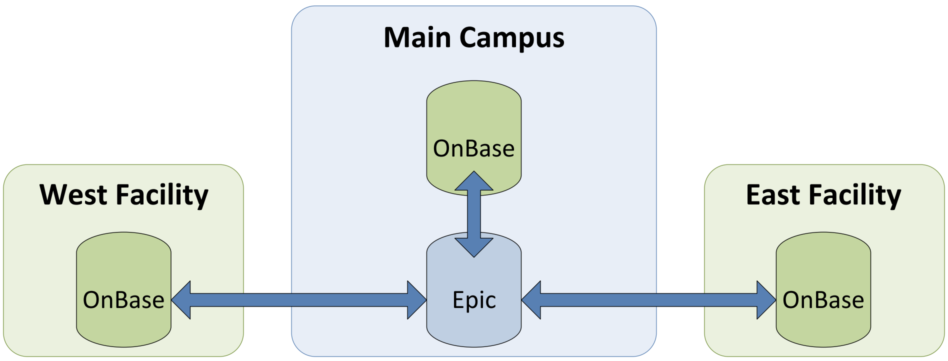
When contacting your solution provider, please provide the following information:

- 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.

Integrating Epic with Multiple OnBase Systems

In a healthcare system with multiple facilities, each facility may have its own deployment of OnBase. In this case, each OnBase system can be integrated with Epic, even if all facilities share a single Epic system.



When multiple OnBase systems are integrated with one Epic system, Epic needs a way to determine which OnBase system to use for retrieving documents. This requirement is satisfied through the use of Facility IDs.

To integrate multiple OnBase systems with Epic, see the following topics:

- Solution Overview on page 33
- Assigning Facility IDs to OnBase Systems on page 35
- Mapping Facility IDs to URLs on page 39
- Setting Up Integration Components on page 43

Solution Overview

When multiple OnBase systems are integrated with Epic, the integration uses Facility IDs to uniquely identify each OnBase system.

When the OnBase integration notifies Epic of new a document, the notification includes both the document handle and the Facility ID for the OnBase system where the document is stored. When Epic later requests the document, the integration uses the document's Facility ID to identify the correct OnBase repository.

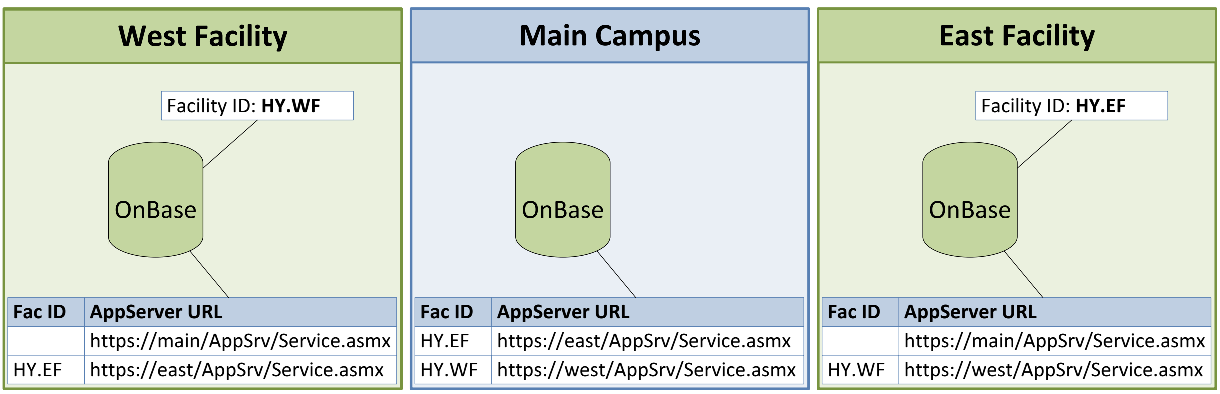
Facility Mapping

In a typical setup, one OnBase system is designated as the home system. When Epic requests a document from OnBase, the integration first checks whether the document's Facility ID matches the Facility ID for the home system. If the IDs match, the integration retrieves the specified document from the home system. If the IDs are different, the integration looks up the document's Facility ID in the facility mapping table.

The facility mapping table is configured on the home system. This table maps the Facility IDs for the remaining OnBase systems to their respective Application Servers. When the integration finds the correct Facility ID in the facility mapping table, it redirects the document request to the specified Application Server. This Application Server then tries to retrieve the document from the data source specified in its Web.config file.

Example Configuration

The following example illustrates how Facility IDs may be configured when multiple OnBase systems are integrated with a single Epic system.



In this example, Epic contained links to documents in the Main Campus OnBase system before Facility IDs were assigned. As a result, no Facility ID has been assigned to the OnBase system at Main Campus. Assigning a Facility ID to this OnBase system would invalidate the existing links in Epic.

All OnBase systems in this example have a facility mapping table configured. Although only one system needs this table configured, the approach in this example allows for any OnBase system to be used as the default data source for the Epic integration components.

If you configure a facility mapping table for only one OnBase system, then you must make this system the default data source for the following integration components:

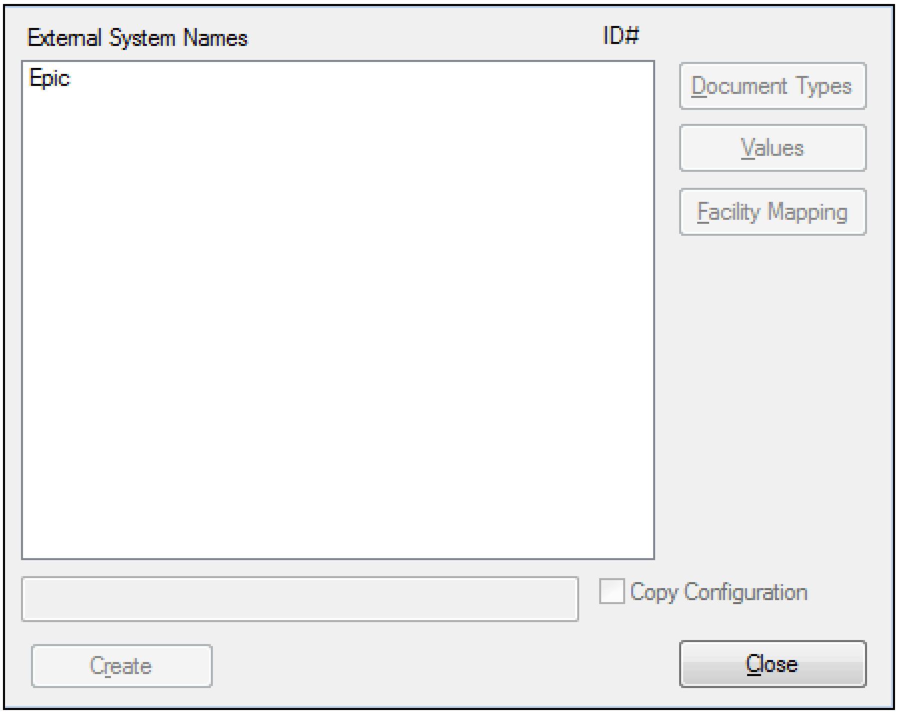
- EpicCare Link
- Image Retrieval API
- Signature Deficiencies for Epic

Assigning Facility IDs to OnBase Systems

The following procedure describes how to assign a Facility ID to a particular OnBase system.

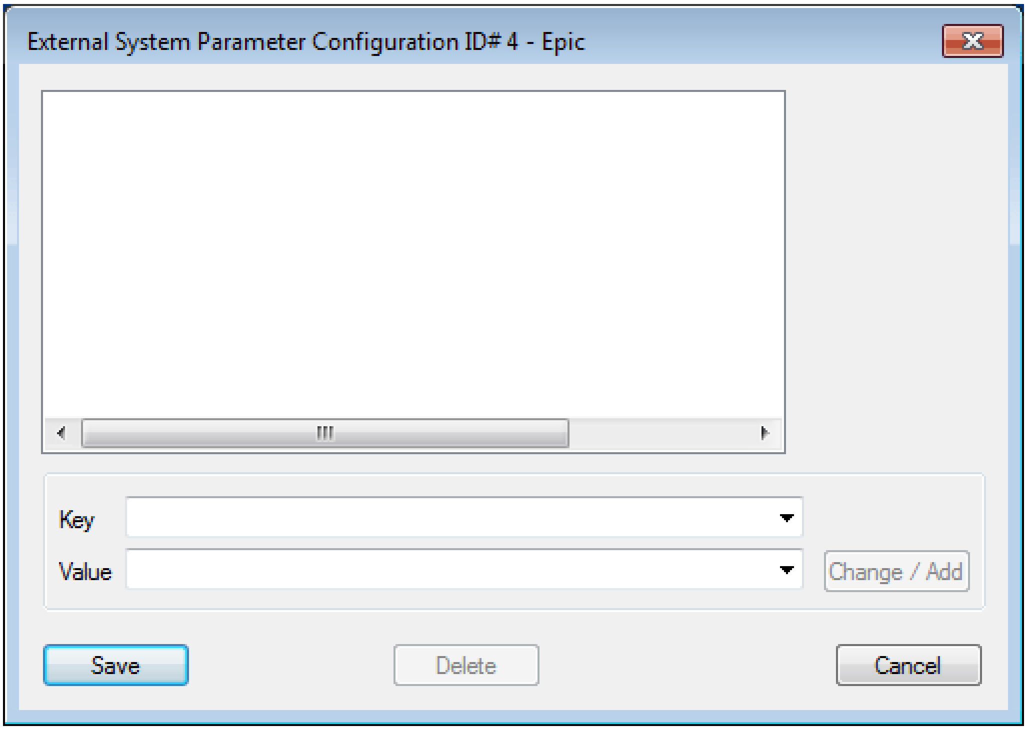
Note: If one OnBase system already has document links in Epic, this system should have no Facility ID assigned. When Epic requests a document using a document ID that has no Facility ID, the integration will retrieve the document from the OnBase system that also has no Facility ID. Only one OnBase system is allowed to have no Facility ID assigned.

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog box is displayed.



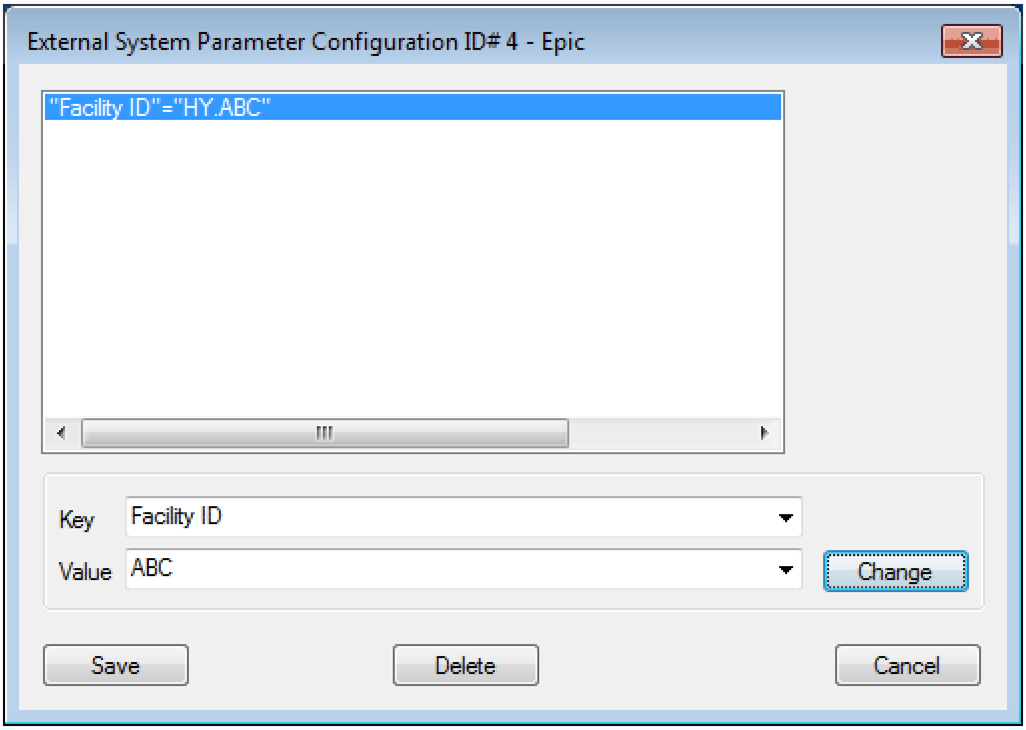
2. Select **Epic** from the list.

3. Click **Values**. The **External System Parameter Configuration** dialog box is displayed.



4. In the **Key** field, type **Facility ID**. This key is case-sensitive. Ensure the **F** and **ID** are capitalized.
5. In the **Value** field, type the new value to use as the Facility ID for this OnBase system. Follow these guidelines:
   - Ensure the Facility ID is unique to the current OnBase system.
   - Do not re-use an ID that has been assigned to another OnBase system in your solution.
   - Do not include a **:** (colon) or **;** (semicolon) character in the Facility ID value.

6. Click **Add**.
   - The new key is added, and the prefix **HY.** is automatically added to the value. The **HY.** prefix ensures the value complies with Epic's internal requirements.
   - If the value you entered already starts with a prefix of **HY.**, the **HY.** prefix will not be appended again.



7. Click **Save** to save the Facility ID.

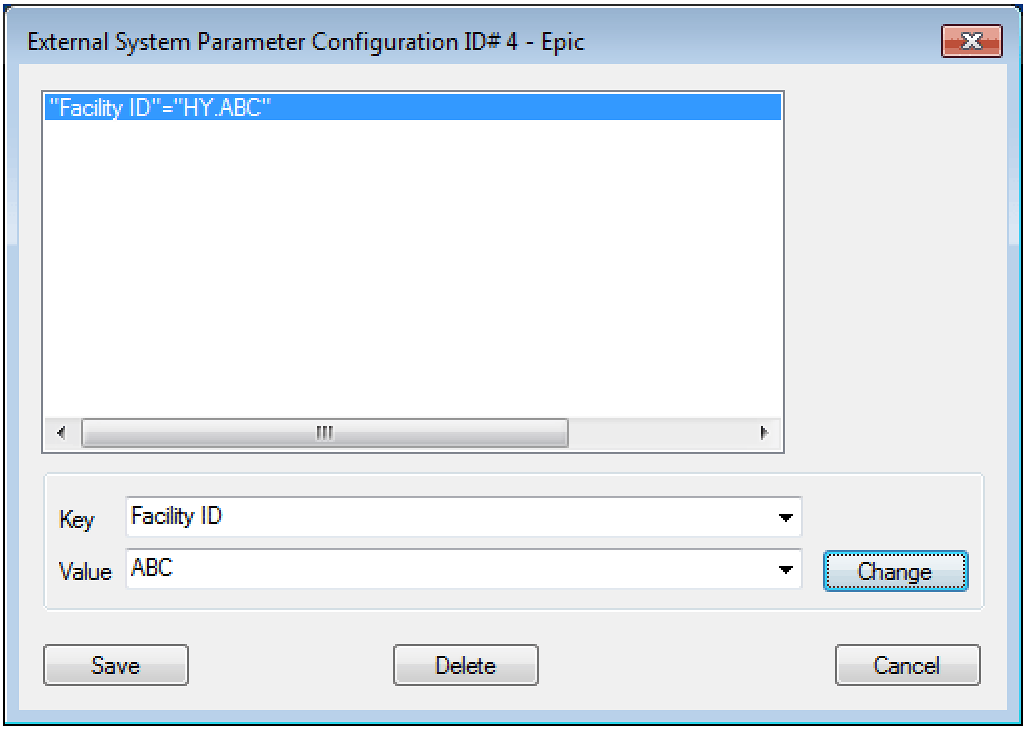
Note: If you click **Save** without first clicking **Add**, the specified **Key** and **Value** are automatically added and saved.

Changing a Facility ID

Note: Do not to change a system's Facility ID after the Facility ID has been configured and used in production. Doing so would invalidate any document IDs sent to Epic under the original Facility ID.

The following steps describe how to change the Facility ID assigned to a system.

1. Select the **Facility ID** setting in the **External System Parameter Configuration** dialog box.



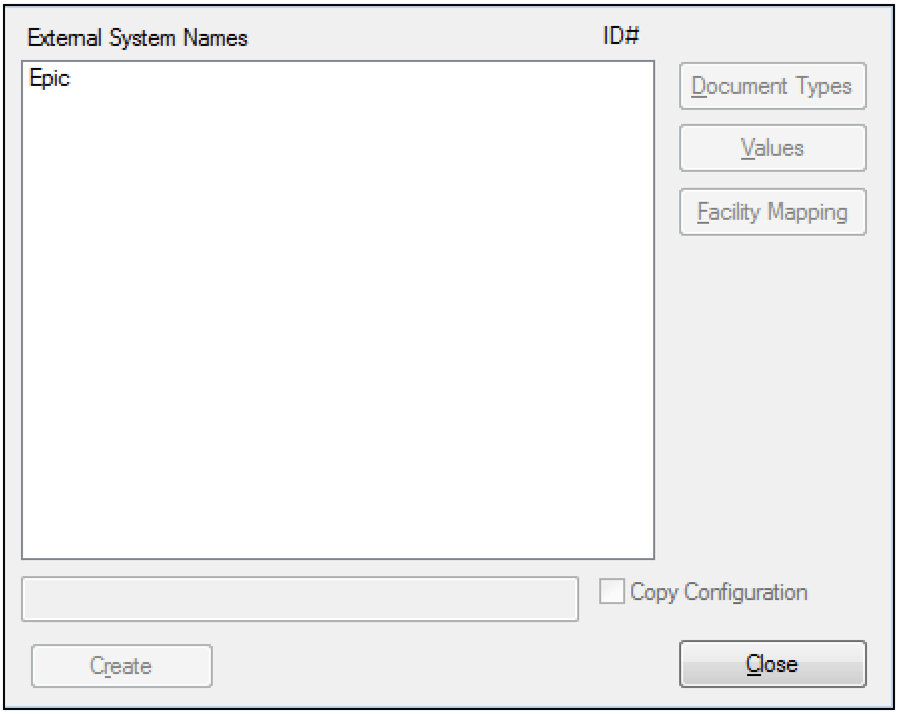
2. In the **Value** field, type the new value for the selected key.
3. Click **Change**.
4. Click **Yes** for both warning messages.
5. Click **Save** to save the change. To cancel the change, click **Cancel**.

Note: If you click **Save** without first clicking **Change**, a warning message prompts you to confirm the change.

Mapping Facility IDs to URLs

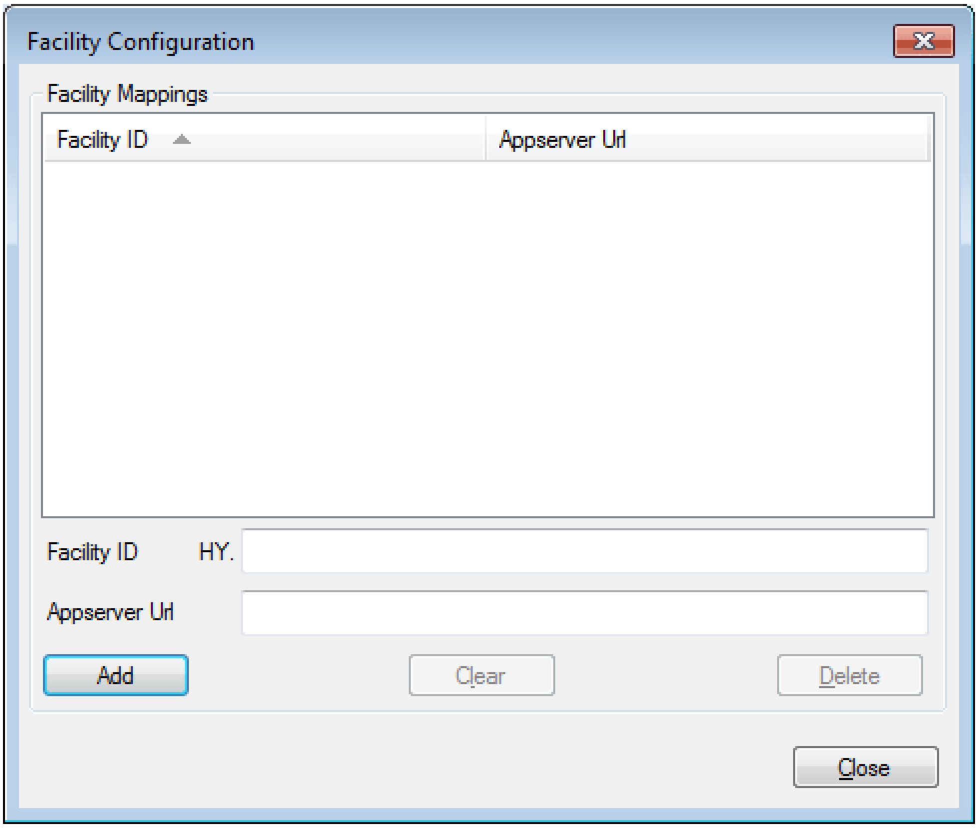
The following procedure describes how to map Facility IDs to Application Server URLs. Perform this procedure for each OnBase system you want to integrate with Epic. At a minimum, you must perform this procedure for the OnBase system that will be used as the default data source for an Epic integration component.

1. In OnBase Configuration, select **Utils | External Systems**. The **External System Configuration** dialog box is displayed.



2. Select **Epic** from the list.

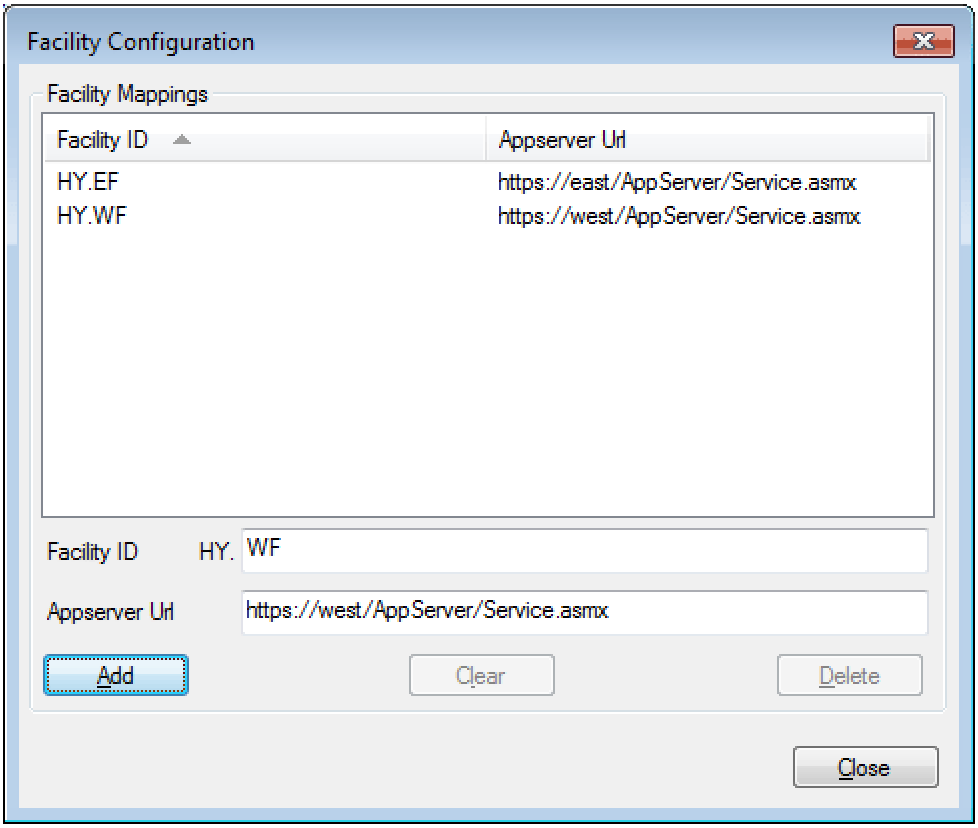
3. Click **Facility Mapping**. The **Facility Configuration** dialog box is displayed.



4. In the **Facility ID** field, type the Facility ID you want to map to a URL.
   - Do not type the **HY.** portion of the Facility ID. The **HY.** will be added to the ID automatically.
   - Do not map the Facility ID for the current OnBase system. Only the Facility IDs for other OnBase systems need to be mapped.
   - If one OnBase system does not have a Facility ID assigned, leave the **Facility ID** field blank for that system. You can map a blank Facility ID to an Application Server URL.
5. In the **Appserver Url** field, type the Application Server URL for the OnBase system the Facility ID is assigned to. Use the following format:

   http://Server/VirtualRoot/Service.asmx

6. Click **Add**. The mapping is added to the list.



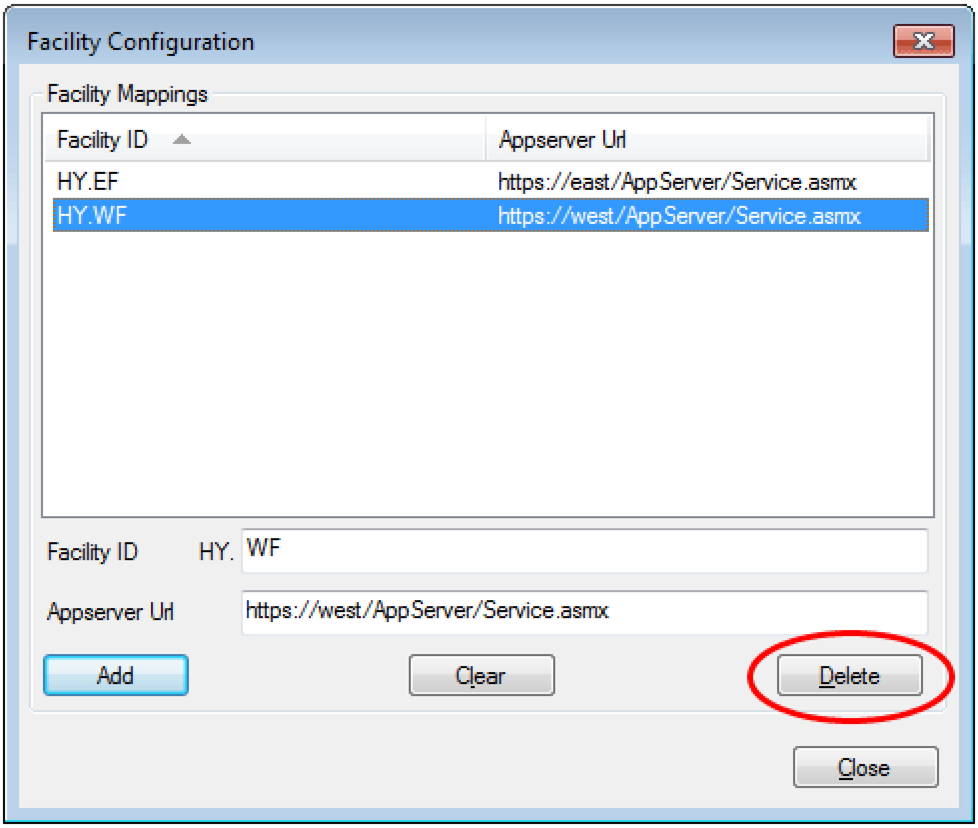
7. Repeat as needed for additional OnBase systems.

   To change or update a mapping, see the following topic.
8. Click **Close** when finished.

Changing a Facility Mapping

If a facility mapping needs to be changed or updated, you must delete the existing mapping and add a new one.

1. In the **Facility Configuration** dialog box, select the **Facility ID** you want to change or remap.
2. Click **Delete**.



3. In the **Facility ID** field, type the Facility ID you want to map.
4. In the **Appserver Url** field, type the Application Server URL for the OnBase system the Facility ID is assigned to.
5. Click **Add**. The new mapping is added to the list.
6. Click **Close** when finished.

Setting Up Integration Components

The following topics describe component-specific requirements for integrating Epic with multiple OnBase systems. Facility IDs and mapping also must be configured as described in the previous procedures.

Note: The web service integration for Epic ROI is not supported in an environment where multiple OnBase systems are integrated with a single Epic system.

To configure integration components, see the following topics:

- OnBase Application Servers on page 43
- Scanning Integrations on page 43
- EpicCare Link Integration on page 45
- Epic Image Retrieval API Integration on page 46
- Epic Welcome Integration on page 46
- OnBase HL7 on page 47
- Signature Deficiencies for Epic on page 48

OnBase Application Servers

When multiple OnBase systems are integrated with Epic, the OnBase Application Servers have the following requirements:

- Each OnBase system integrated with Epic must have its own OnBase Application Server.
- If an Application Server is mapped to a Facility ID in a facility mapping table, then the **dmsdatasource** in the Application Server's Web.config file must point to the OnBase system assigned to that Facility ID.

Scanning Integrations

You can configure the Scan Acquisition Server (SAS) or Front Office Scanning (FOS) integration to connect to the correct OnBase system for import. When notifying Epic of a new document, the SAS or FOS integration sends Epic both the document handle and the Facility ID for the system where the document has been stored.

When integrating with Epic Hyperdrive using a SMART on FHIR launch of the SAS or FOS client, you can configure exact parameters for the **location** and **environmentID** elements in the command line interface. To launch the SAS or FOS client successfully, you must also configure exactly one matching value in the **EpicIntegrations.config** file for each of these elements provided on the command line. If neither element is provided on the command line, you must also remove these elements from the **EpicIntegrations.config** file.

To configure a SAS or FOS client launch:

1. Open the **EpicIntegrations.config** file that resides in the same directory as the scanning DLLs for SAS or FOS.
2. Locate the **<servers>** element under **<OBEpicViewer>**.

3. Under **<servers>**, add or modify a **<server>** element to include the following child elements:

Element	Description
location	The **location** is a value provided by Epic. In a multi-facility system, Epic may associate each facility with a different location value.
environmentID	The **environmentID** is a value provided by Epic for the environment ID you want to map.
url	The **url** is the Application Server URL to connect to for the specified location.
datasource	The **datasource** is the name of the connection string to use on the specified Application Server.

4. Using these child elements, map an Epic location to the appropriate OnBase data source.

   For example:

```
<servers>
<server>
<location>Emergency Room West</location>
<environmentID>PRD</environmentID>
<url>https://server1/service.asmx</url>
<datasource>OB_PRD</datasource>
</server>
</servers>
```

   When mapping an Epic location to the OnBase data source, also note the following:

   - You can use a combination of locations and environment IDs to archive documents to different OnBase systems. If Epic sends OnBase a location value and an environment ID that are mapped to different OnBase systems, then the system mapped to the location value will be used.
   - If a value contains a **<**, **>**, or **&**, then the value must be enclosed in **CDATA** tags. For example, if the location is X&Y, then the **<location>** element would use the following format: **<location><![CDATA[**X&Y**]]></location>**. Otherwise, the CDATA tags can be omitted.

5. Repeat for each location being used with this SAS or FOS deployment.
6. Save **EpicIntegrations.config**.

EpicCare Link Integration

The EpicCare Link integration (which includes PlanLink and EpicWeb) is supported for both retrieving and uploading documents using multiple OnBase systems. See the following topics for additional setup information.

EpicCare Link Retrieval

Complete the following steps to configure the EpicCare Link integration to retrieve documents from multiple OnBase systems.

1. Open OnBaseEpicWeb.config.
2. Add the following line under the **<OnBaseEpicWeb>** tag.

```
<multiInstanceOnBaseMode>true</multiInstanceOnBaseMode>
```

3. Update **appserverUrl** as needed for multi-instance OnBase mode.
   - The **appserverUrl** setting must provide the URL to the default Application Server.
   - In the Application Server's Web.config file, **dmsdatasource** must provide the name of the default connection string for your solution.
   - This data source must have facility mapping configured.

Note: The **datasource** setting in OnBaseEpicWeb.config is ignored when **multiInstanceOnBaseMode** is set to **true**. Instead, the integration uses the **dmsdatasource** specified in the Application Server's Web.config.

4. Save OnBaseEpicWeb.config.

EpicCare Link Upload

Complete the following steps to configure EpicCare Link to upload documents using multiple OnBase systems.

1. Make sure OnBaseEpicWeb.config is set up as described under the previous topic, EpicCare Link Retrieval.
2. Create a **Location** Keyword Type in each OnBase system integrated with Epic.
3. Assign the **Location** Keyword Type to all Document Types used for EpicCare Link upload.
4. In OnBaseEpicWeb.config, add a **facilities** element containing the following:

```
<facilities>
    <facility>
      <location><![CDATA[]]></location>
      <facilityID><![CDATA[]]></facilityID>
    </facility>
    <facility>
      <location><![CDATA[]]></location>
      <facilityID><![CDATA[]]></facilityID>
    </facility>
</facilities>
```

5. Create one facility child element for each location you need to map.

   For example, if two different location values may be passed in, the **facilities** element requires two **facility** child elements.
6. Map possible **Location** values to the appropriate Facility ID for that location. For example:

```
<facilities>
    <facility>
      <location><![CDATA[Eastland]]></location>
      <facilityID><![CDATA[HY.EF]]></facilityID>
    </facility>
    <facility>
      <location><![CDATA[Westland]]></location>
      <facilityID><![CDATA[HY.WF]]></facilityID>
    </facility>
</facilities>
```

- In this example, the Facility ID for the OnBase system at Eastland is HY.EF. The Facility ID for the OnBase system at Westland is HY.WF. If a user uploads a document with a **Location** of **Eastland**, then the integration looks up HY.EF in its default data source. If HY.EF is mapped to an Application Server, the document will be uploaded to the data source configured for that Application Server.
- **Location** values are passed in by Epic. Contact your Epic system administrator for a list of all possible **Location** values for your solution.
- If a document is uploaded without a **Location** value, then the document will be saved to the data source for the Application Server specified as the **appserverUrl**.
- If a document is uploaded with a **Location** value that does not exist in OnBaseEpicWeb.config, then the document will not be uploaded to any OnBase system. The error log for the EpicCare Link integration will log the following message:

```
No FacilityID configured for 'Location' keyword value of '<value>' in the
OnBaseEpicWeb.config file.
```

7. Save OnBaseEpicWeb.config.

Epic Image Retrieval API Integration

The Epic Image Retrieval API integration requires no additional configuration. The Image Retrieval API integration respects Facility ID configuration and mapping when retrieving documents.

Epic Welcome Integration

The integration for Epic Welcome Kiosk requires no additional configuration, because it does not send Epic the identifiers for new documents scanned at the kiosk.

If Epic should be notified of documents scanned into OnBase through the kiosk, you can configure OnBase Workflow to send Epic the document information using HL7.

OnBase HL7

Because the OnBase HL7 module uses document handles to identify OnBase documents, additional configuration is necessary to ensure document identifiers are sent and received in the correct format.

See the following topics for requirements. For additional information, see the **HL7** module reference guide.

Sending HL7 Messages From OnBase To Epic

For each OnBase system with a Facility ID assigned, map the $$EPICFACDOCNUMBER default value to the HL7 template field where Epic expects the document ID.

The $$EPICFACDOCNUMBER default value allows HL7 to send the document ID in the format `<Facility ID>.<itemnum>`, where `<Facility ID>` is the Facility ID configured for the current OnBase system and `<itemnum>` is the document handle.

Sending HL7 Messages From Epic to OnBase

If Epic sends OnBase an HL7 message containing a document ID, the message must only be sent to the OnBase system where the document is stored.

Additional configuration is necessary if HL7 messages from Epic contain document IDs prefixed with the Facility ID for the receiving OnBase system. A script must be configured to strip the prefixed characters from values in the document ID field. For the script to be executed, an import process with the following settings must be configured for each message template used to receive document notification messages from Epic.

Import Process Setting	Description
Message Type	Any message template used to receive document notification messages from Epic.
Sending Application	If the selected message template is used with applications other than Epic, then a **Sending Application** filter must be configured to ensure the import process executes only for Epic messages.
Message Action	Execute VBScript
Options	1. Select the script configured to strip the document ID value down to the OnBase document handle. Document IDs from Epic may be in the following format: `<Facility ID>.<itemnum>` (where `<itemnum>` is the document handle). 2. Select the **Execute First** setting.
Sequence Suggestion	A sequence suggestion may be necessary to ensure the execution of this script does not conflict with other configured scripts. Refer to the **HL7** module reference guide for more information.

Signature Deficiencies for Epic

Signature Deficiencies for Epic respects Facility ID configuration and mapping when retrieving documents. Complete the following steps to configure Signature Deficiencies to retrieve documents from multiple OnBase systems.

1. Open the EpicIntegrations.config file for Signature Deficiencies for Epic. In a typical installation, this file is located in C:\Program Files (x86)\Hyland\Integration for Epic\SD4E.
2. Add the following line under the **<SD4E>** tag:

```
<multiInstanceOnBaseMode>true</multiInstanceOnBaseMode>
```

3. Set the **<epicDatasource>** to a data source with facility mapping configured.
4. If Signature Deficiencies for Epic is configured to use different data sources for different Epic environment IDs, make sure each data source has facility mapping configured.
5. Save EpicIntegrations.config.

Overview

The Hyland Integration for Epic installer installs the components required to deploy the OnBase Epic integrations. The installation wizard can install any or all server-side and client-side components for the Epic integrations.

Available server-side components are described in the following table:

Server-Side Component	Description
Application Server	Installs the necessary Integration for Epic DLLs to the Application Server's bin directory. The installer does not install the OnBase Application Server. It only copies the necessary Integration for Epic files to the Application Server's virtual directory.
Signature Deficiencies	Installs the server-side components for Signature Deficiencies for Epic, including the SD4E.txt configuration file. The Application Server component is selected automatically when this component is selected.

Available client-side components are described in the following table:

Client-Side Component	Description
Scan Acquisition Server	Installs the OnBase Scan Acquisition Server.
Front Office Scanning	Installs the Epic Front Office Scanning integration.
Healthcare Web Viewer	Installs the OnBase Web Viewer.
EpicCare Link	Installs the EpicCare Link integration.
Signature Deficiencies	Installs the client-side components for Signature Deficiencies for Epic. Also installs the OnBase Alt ActiveX controls.

Installer Requirements

You must be logged on to the installation machine with administrator privileges in order to use the Hyland Integration for Epic installer.

The Hyland Integration for Epic installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

Limitations

Before using the installer, be aware of the following limitations:

1. The installer does not set any values in the registry.
2. The installer does not configure any configuration files, with the following exception:
   When installing the server-side Signature Deficiencies component, the installer adds and configures a default **SD4EConfigLocation** setting in the Application Server's Web.config.
3. The installer does not copy or register the testing files used to test the integrations outside of an Epic environment.

Installation

To install the Epic integration components, see the following topics:

- Introduction to Installers on page 50
- Uninstalling Previous OnBase Versions on page 52
- Preparing the Epic Integration Configuration Files on page 52
- Running the Installer on page 53
- Installing Epic Integrations from the Command Line on page 67

Introduction to Installers

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.

Uninstalling Previous OnBase Versions

It is considered a best practice to uninstall any previous versions of the Epic integration components before upgrading to the latest version.

If you are upgrading the Scan Acquisition Server or Front Office Scanning integration from OnBase 13 or earlier, you must uninstall the files from the previous version. In OnBase 13 and earlier, the versioning for certain scanning files is different from later OnBase versions. As a result, these files cannot be upgraded by the installer. By uninstalling the scanning integration files before performing an upgrade, you can ensure the correct version of the files will be installed.

Preparing the Epic Integration Configuration Files

When it runs, the installer does not configure the Epic integration configuration files, but it can copy pre-configured configuration files from a directory to the required locations.

To deploy the properly configured files, first create and configure the required integration configuration files. These files are described in the following table:

Configuration File	Description
EpicIntegrations.config	Used by the Scan Acquisition Server, Front Office Scanning integration, and Signature Deficiencies for Epic. To create this file, use the EpicConfigFileCreator.exe utility provided with the installer files.
EpicKeywords.txt	Used by the Scan Acquisition Server. Configure the sample file provided in the same directory as the installer. The installer deploys this file to the same directory as the Scan Acquisition Server integration files. For more information, see the Scan Acquisition Server configuration documentation.
OnBaseEpicWeb.config	Used by the EpicCare Link integration, which includes PlanLink and EpicWeb. To create this file, see the installation documentation for Integration for EpicCare Link.

Configuration File	Description
SD4E.txt	Used by Signature Deficiencies for Epic. Configure the sample file provided in the same directory as the installer. The installer deploys this file to the root of the Application Server's virtual directory. For more information, see the Signature Deficiencies for Epic configuration documentation.

Running the Installer

The following steps describe how to install Epic integration server- and client-side components using the Hyland Integration for Epic installer.

See the following topics:

- Where to Run the Installer on page 53
- How to Run the Installer on page 54

Where to Run the Installer

Use the following table to determine where to run the installer:

To install this component	Run the installer here
EpicCare Link integration	EpicCare Link or EpicWeb server
Front Office Scanning	Client workstations or Citrix servers where the Epic client executables reside
OnBase Application Server integration files	OnBase Application Server
Healthcare Web Viewer	Client workstations or Citrix servers where the Epic client executables reside
Scan Acquisition Server	Client workstations or Citrix servers where the Epic client executables reside
Signature Deficiencies for Epic (client-side)	Client workstations or Citrix servers where the Epic client executables reside
Signature Deficiencies for Epic (server-side)	OnBase Application Server

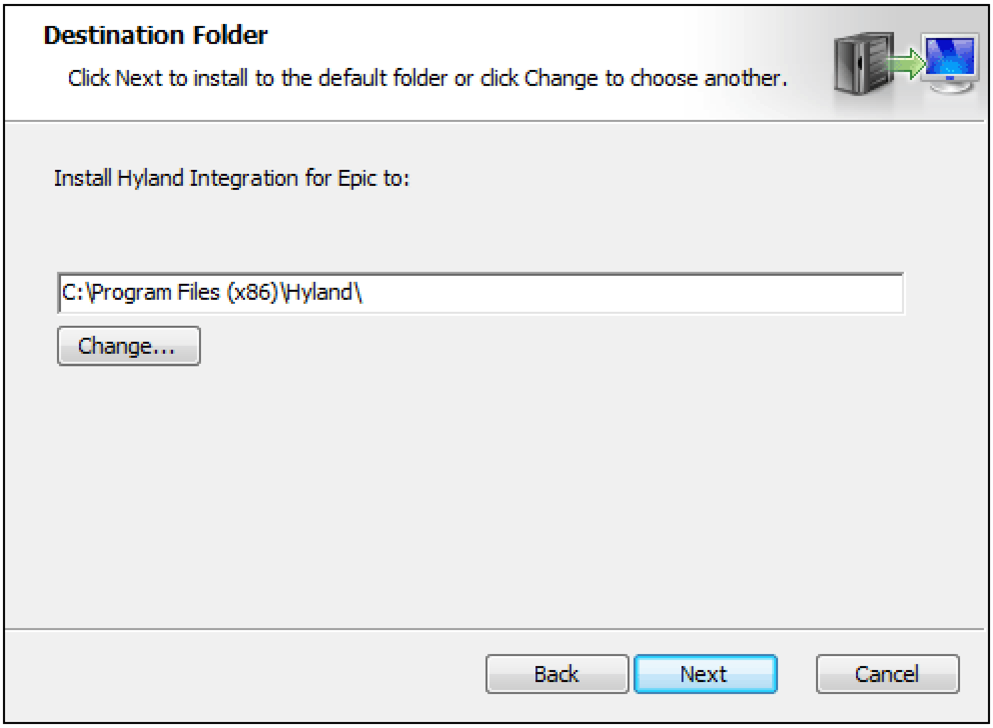
How to Run the Installer

To perform an interactive installation:

1. Launch the installer by executing **setup.exe**. This file is usually located in the **\install\Integration for Epic** folder of your source installation files.

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

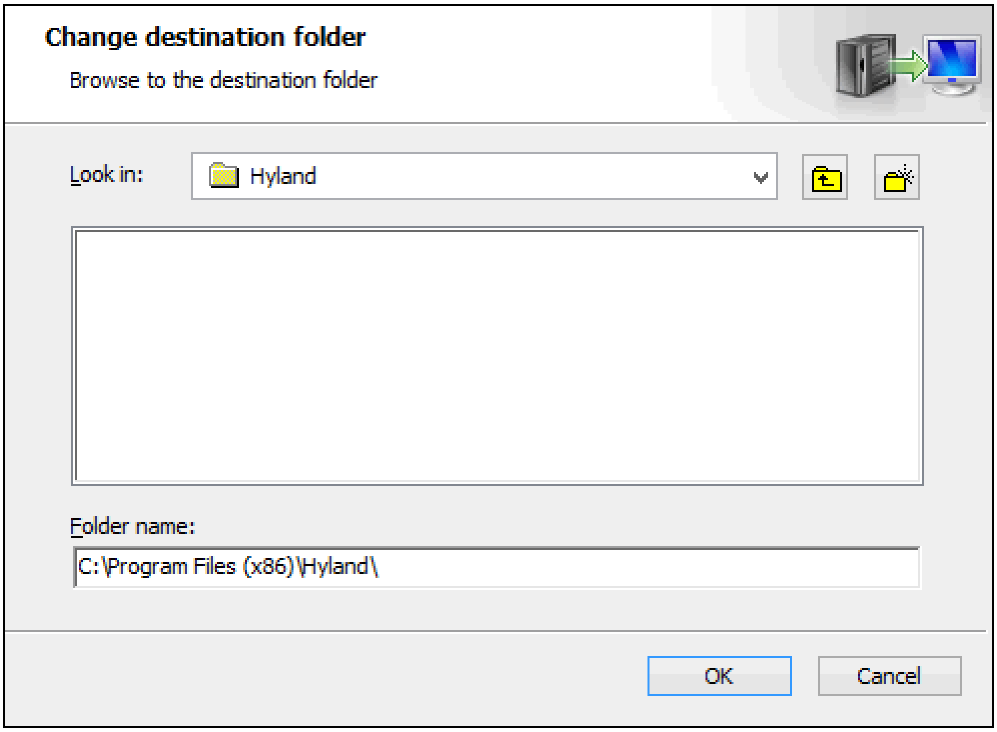
2. Click **Next**. The **Destination Folder** dialog is displayed.



3. In the field provided, enter top-level directory where integration components should be installed, or click **Change** to browse to it.

Note: This location does not apply to the Front Office Scanning integration. The location of this component can be changed later in the installation process.

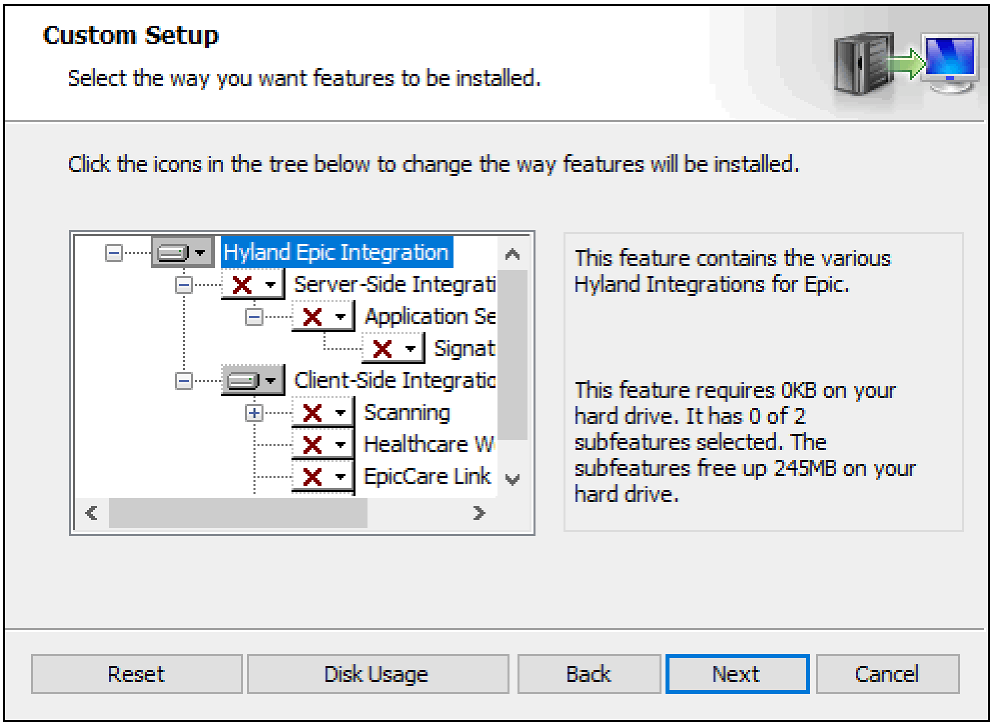
If you click **Change**, the **Change destination folder** dialog is displayed.



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

If the Destination Folder is not changed, the default location is used (e.g., **C:\Program Files\Hyland** or **C:\Program Files(x86)\Hyland**).

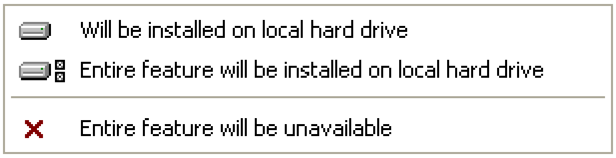
4. Click **Next**. The **Custom Setup** dialog is displayed.



- Server-side components are listed under **Server-Side Integrations**.
- Client-side components are listed under **Client-Side Integrations**. Some components require you to first select if you are using Epic Hyperspace or Epic Hyperdrive.

Note: The **Application Server** component does not install the OnBase Application Server itself. It installs the required server-side Epic integration files.

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

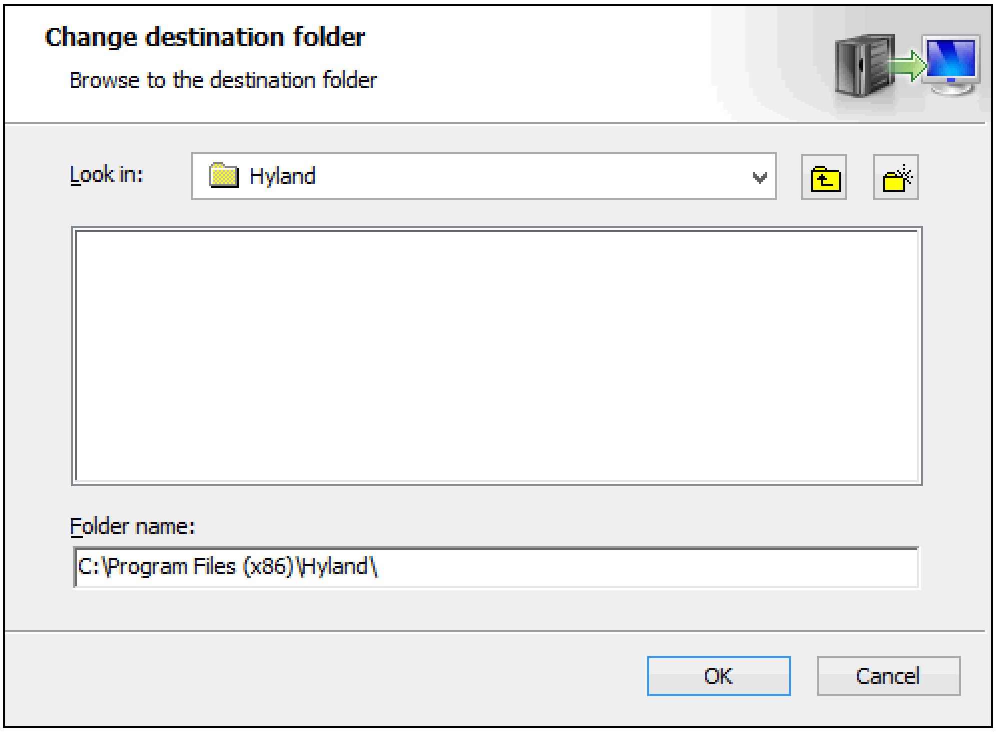


Option	Description
Will be installed on local hard drive	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the **+** icon next to the feature to expand the sub feature list.

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

6. Select **This feature 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 the top-level component.
7. 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 machine.
8. To change the installation location of a component, select it and click **Browse**. The **Change destination folder** dialog box 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 default locations listed in the following table.

Component	Default Location
Application Server Server Side	**C:\Inetpub\wwwroot\AppServer** The path should point to the root of the Application Server virtual directory. Selecting the **Application Server** component does not install the OnBase Application Server itself; rather, it installs the server-side Epic integration files.
Signature Deficiencies Server Side	**<Application Server location>** This location is dependent on the Application Server path and cannot be changed. To change the Application Server path, select the **Application Server** component and click **Browse**.
Scan Acquisition Server Client Side	**<Destination Folder>\Integration for Epic\<v85>\SAS** This location is the same whether the component is selected for use with Epic Hyperspace or Epic Hyperdrive. **Note:** The Scan Acquisition Server and Epic Front Office Scanning integration cannot be installed together on the same machine.
Front Office Scanning Client Side	**<Destination Folder>\Front Office Scanning** This location is the same whether the component is selected for use with Epic Hyperspace or Epic Hyperdrive. **Note:** The Scan Acquisition Server and Epic Front Office Scanning integration cannot be installed together on the same machine.
Healthcare Web Viewer Client Side	**<Destination Folder>\Integration for Epic\Web Viewer** This location is dependent on the destination folder path and cannot be changed from the **Custom Setup** dialog. To change the destination folder path, click **Back**, and then click **Change**.
EpicCare Link Client Side	**<Destination Folder>\Integration for Epic\Web** This location is dependent on the destination folder path and cannot be changed from the **Custom Setup** dialog. To change the destination folder path, click **Back**, and then click **Change**.
Signature Deficiencies Client Side	**<Destination Folder>\Integration for Epic\SD4E** This location is dependent on the destination folder path and cannot be changed from the **Custom Setup** dialog. To change the destination folder path, click **Back**, and then click **Change**.

9. To finish the installation, proceed to one of the following topics:
   - Scan Acquisition Server Installation Options on page 59
   - Front Office Scanning Installation Options on page 61

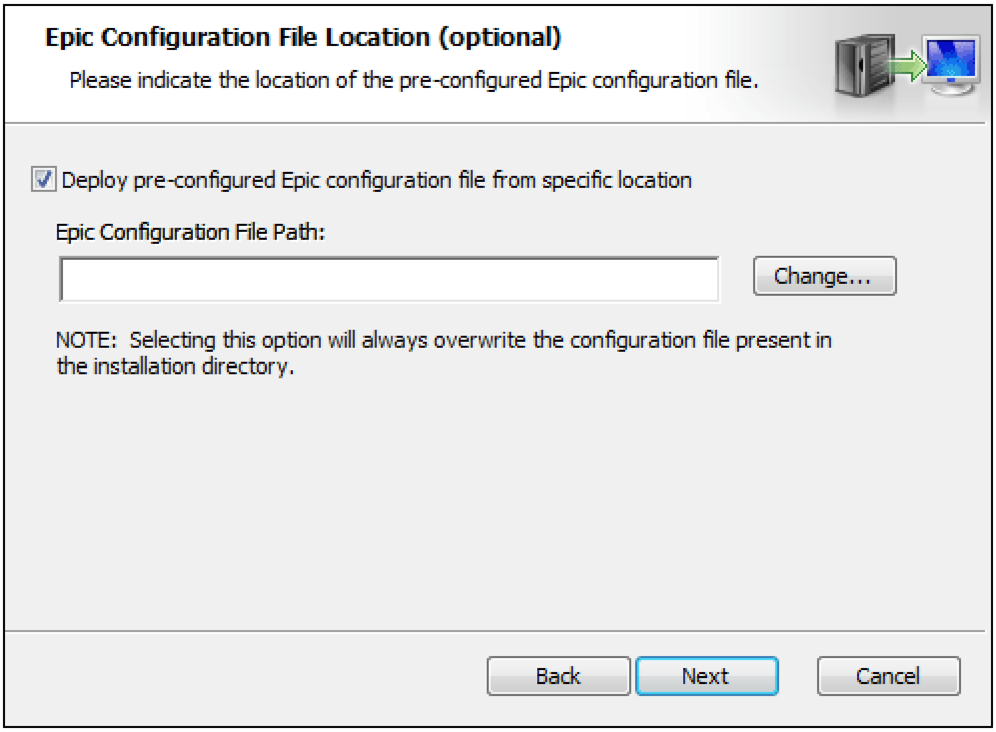
- EpicCare Link Installation Options on page 63
- EpicCare Link Installation Options on page 63
- Signature Deficiencies Installation Options on page 65

Scan Acquisition Server Installation Options

If you selected the **Scan Acquisition Server** component in the **Custom Setup** dialog, the installer prompts you for the location of the EpicIntegrations.config configuration file.

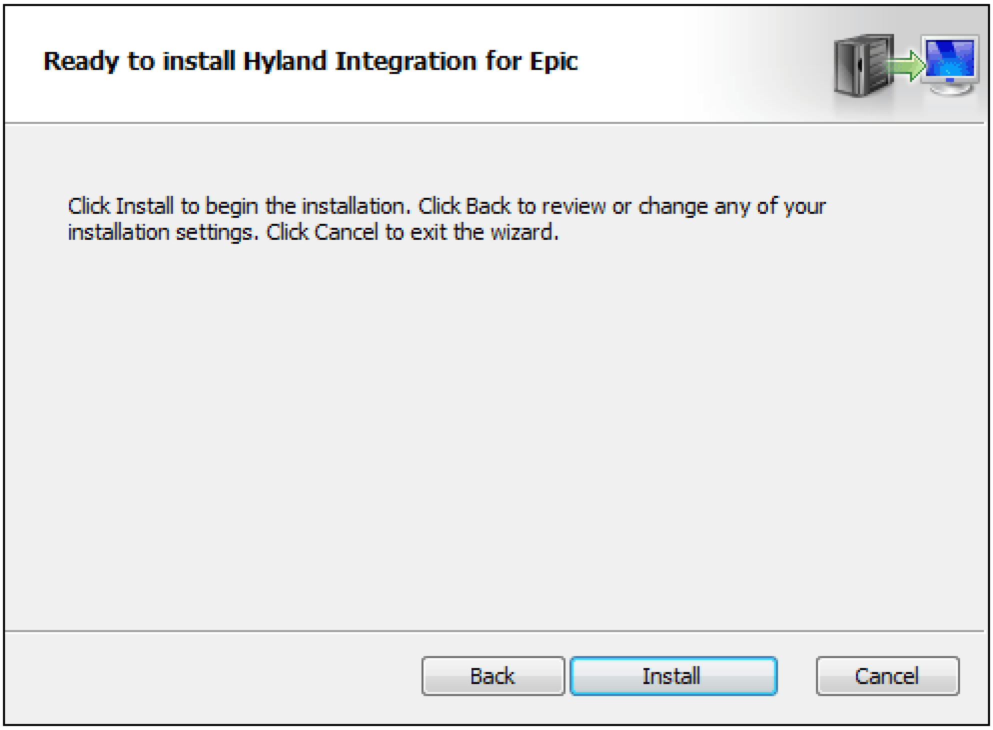
To provide a configuration file:

1. Click **Next** from the **Custom Setup** dialog. The next screen prompts you for the location of a pre-configured EpicIntegrations.config file.
2. To use a pre-configured file, select **Deploy pre-configured Epic configuration file from specific location**. Otherwise, skip to step 5.



3. Click **Change** to navigate to the configuration file.
4. Navigate to the EpicIntegrations.config file to be deployed by the installer.

5. Click **Next**. The **Ready to install Hyland Integration for Epic** dialog is displayed.



6. Do one of the following:
   - Click **Install** to install the selected components.
   - Click **Back** to return to the previous dialog to change installation options.
   - Click **Cancel** to close the installer without installing any of the selected components.
7. When the **Completed the Hyland Integration for Epic Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

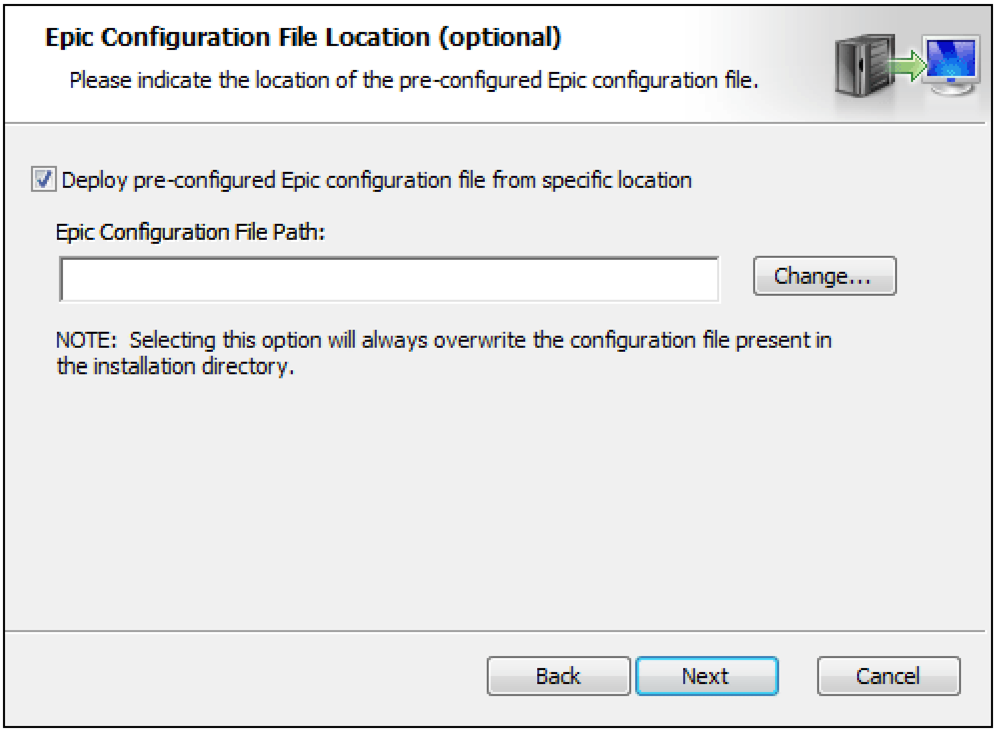
Note: To ensure the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

Front Office Scanning Installation Options

If you selected the **Front Office Scanning** component in the **Custom Setup** dialog, the installer prompts you for the location of the configuration files.

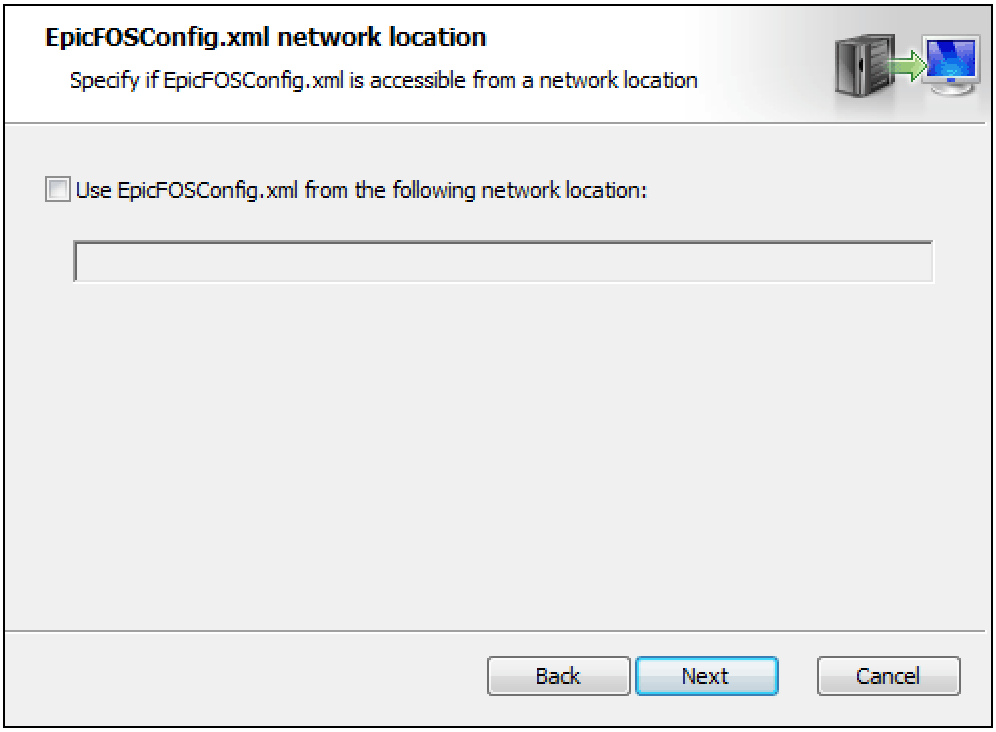
To provide the locations of configuration files:

1. Click **Next** from the **Custom Setup** dialog.
2. To use a pre-configured file, select **Deploy pre-configured Epic configuration file from specific location**. Otherwise, skip to step 5.



3. Click **Change** to navigate to the configuration file.
4. Navigate to the EpicIntegrations.config file to be deployed by the installer.

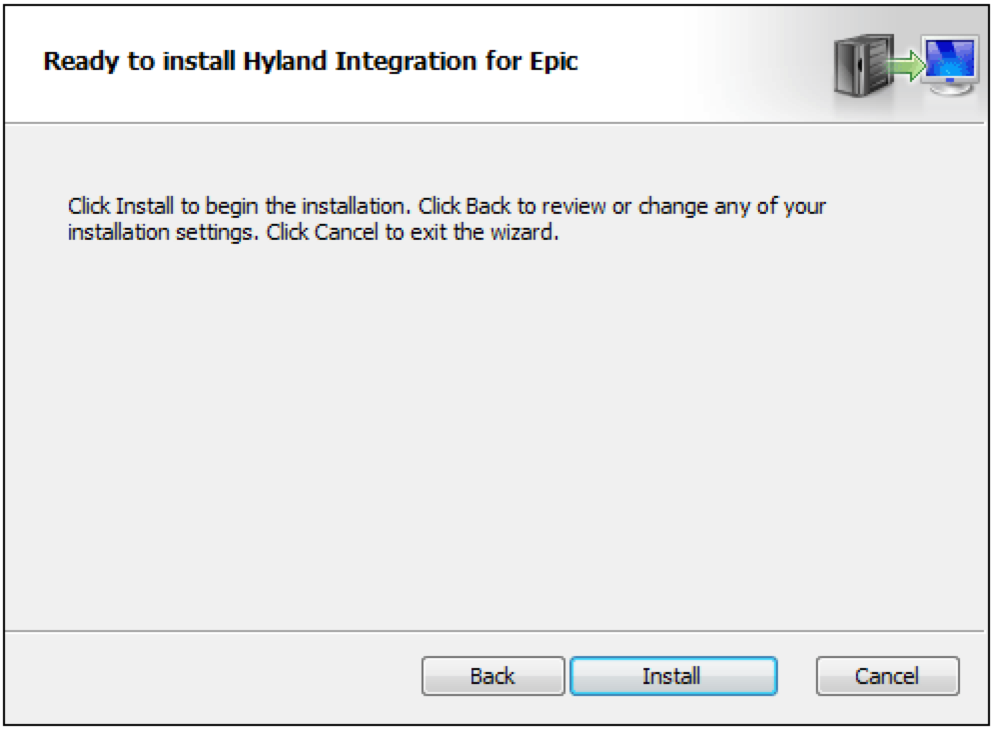
5. Click **Next**. The next screen prompts you for the location of the EPICFOSCONFIG.xml file.



6. If Front Office Scanning should use an EPICFOSCONFIG.xml file shared on the network, select **Use EpicFOSConfig.xml from the following network location**.
   - If this setting is selected, Front Office Scanning will obtain its configuration from a shared file in a specific location. The installer will not create an EPICFOSCONFIG.xml file in the client installation folder.
   - If this setting is not selected, installer will create an EPICFOSCONFIG.xml file in the Front Office Scanning client installation folder. The file will be populated with default settings.
7. If you selected **Use EpicFOSConfig.xml from the following network location**, enter the full path, including file name, to the shared EPICFOSCONFIG.xml file. This can be a local or UNC path.

   This path will become the value for the **EpicConfigFile** string value in the Windows registry.

8. Click **Next**. The **Ready to install Hyland Integration for Epic** dialog is displayed.



9. Do one of the following:
   - Click **Install** to install the selected components.
   - Click **Back** to return to the previous dialog to change installation options.
   - Click **Cancel** to close the installer without installing any of the selected components.
10. When the **Completed the Hyland Integration for Epic Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

Note: To ensure the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

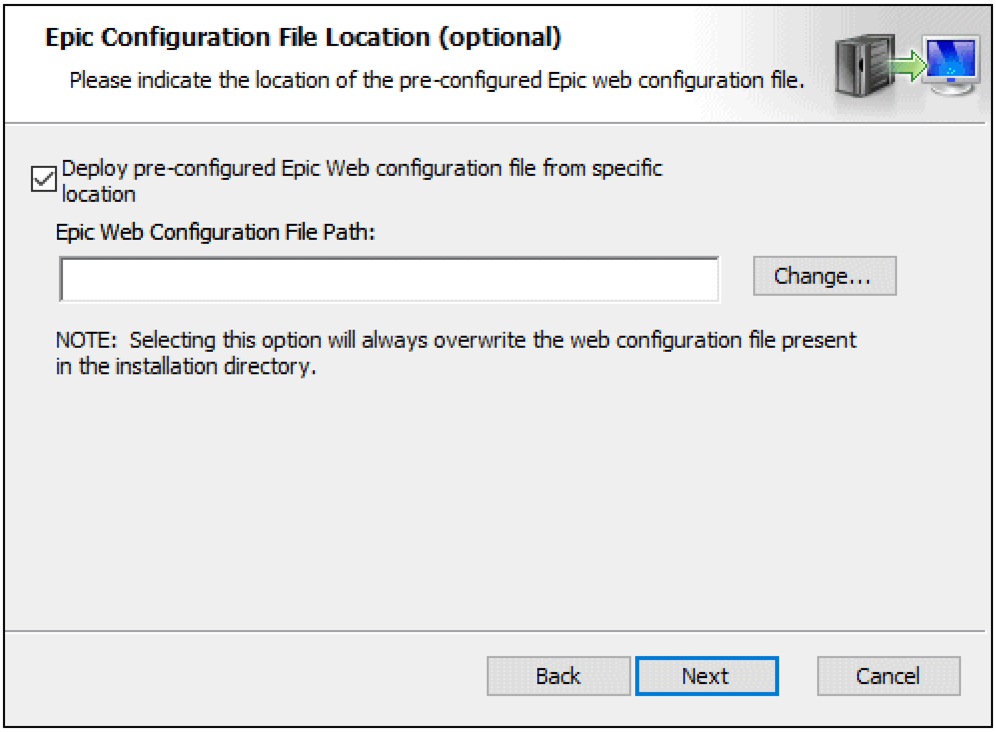
EpicCare Link Installation Options

If you selected the **EpicCare Link** component in the **Custom Setup** dialog, the installer prompts you for EpicCare Link configuration information.

To configure EpicCare Link settings:

1. Click **Next** from the **Custom Setup** dialog.
2. Click **OK** if the compatibility warning is displayed.

3. To use a pre-configured file, select **Deploy pre-configured Epic Web configuration file from specific location**. Otherwise, skip to step 6.



4. Click **Change** to navigate to the configuration file.
5. Navigate to the OnBaseEpicWeb.config file to be deployed by the installer.
6. Click **Next**. The **Ready to install Hyland Integration for Epic** dialog is displayed.
7. Do one of the following:
   - Click **Install** to install the selected components.
   - Click **Back** to return to the previous dialog to change configuration options.
   - Click **Cancel** to close the installer without installing any of the selected components.
8. When the **Completed the Hyland Integration for Epic Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

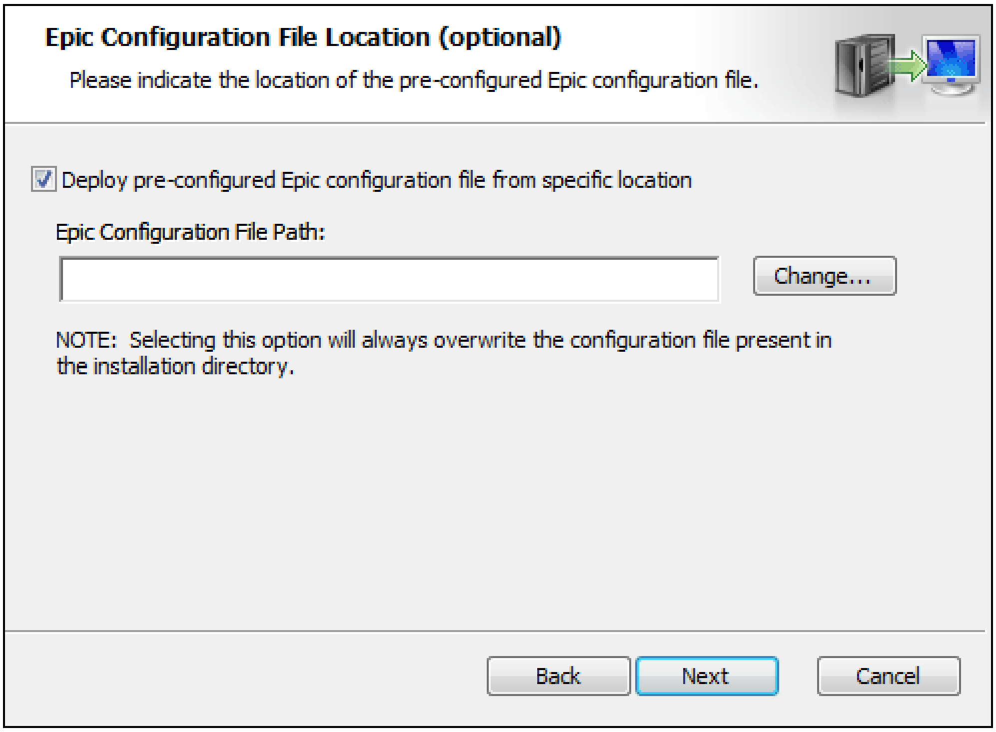
Note: To ensure the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

Signature Deficiencies Installation Options

If you selected the **Signature Deficiencies** component in the **Custom Setup** dialog, the installer prompts you for the location of the EpicIntegrations.config configuration file.

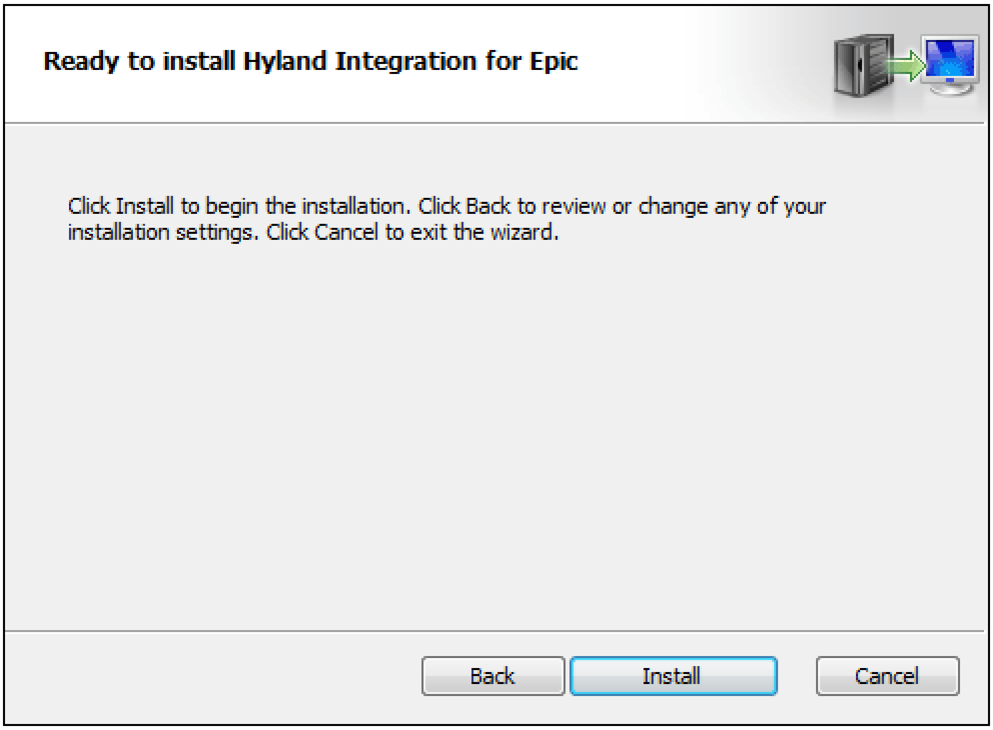
To provide a configuration file:

1. Click **Next** from the **Custom Setup** dialog.
2. To use a pre-configured file, select **Deploy pre-configured Epic configuration file from specific location**. Otherwise, skip to step 5.



3. Click **Change** to navigate to the configuration file.
4. Navigate to the EpicIntegrations.config file to be deployed by the installer.

5. Click **Next**. The **Ready to install Hyland Integration for Epic** dialog is displayed.



6. Do one of the following:
   - Click **Install** to install the selected components.
   - Click **Back** to return to the previous dialog to change installation options.
   - Click **Cancel** to close the installer without installing any of the selected components.
7. When the **Completed the Hyland Integration for Epic Setup Wizard** dialog is displayed, click **Finish** to complete the installation.

Note: To ensure the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

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.
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.

Installing Epic Integrations from the Command Line

The following topics describe how to install the Hyland Integration for Epic components from a command line. For general information about command line installations and options, including options for running the installer silently, see the following documentation from Microsoft: http://msdn.microsoft.com/en-us/library/aa367988.aspx

- Applying Component Installation Options on page 68
- Features & Properties Reference for Command Line Installations on page 69

Applying Component Installation Options

The following sections describe how to customize component installation from the command line using feature and property names.

- **Features** define which components are installed.
- **Properties** define installation settings for the respective components.

Adding Features

For command line installations, use the **ADDLOCAL** property to specify which components are installed.

- To install a component, pass its *feature name* to the installer using the **ADDLOCAL** property. See Features & Properties Reference for Command Line Installations on page 69.
- Append the **ADDLOCAL** property (with component feature names) to the end of the install command line. The following example would install the Healthcare Web Viewer and the Scan Acquisition Server for Epic August 2018 and later (version 85) to their default directories.

```
msiexec /i "Hyland Integration for Epic.msi" ADDLOCAL=EpicWebViewer,Epic85SAS /
quiet
```

Note: Feature names are case sensitive.

Note: If you install the server-side Signature Deficiencies for Epic component, the required Application Server component is installed automatically. You do not need to pass in the Application Server's feature name on the command line.

Configuring Properties

When installing a component from the command line, you can apply properties to specify the component's installation settings.

For example, to change where component files are installed, apply the component's directory property. For the server-side Signature Deficiencies for Epic files, the directory property is **APPLICATIONSERVER_FILES**:

```
msiexec /i "Hyland Integration for Epic.msi" ADDLOCAL=SignatureDeficienciesServer
APPLICATIONSERVER_FILES="C:\inetpub\wwwroot\DMSAppServer\" /quiet
```

For a complete list of properties for each component, see the Features & Properties Reference for Command Line Installations on page 69.

Features & Properties Reference for Command Line Installations

The following topics describe the features and properties you can use to install the Epic integrations from a command line. Before you begin, be sure to read the important notes in the following topic.

Important Notes

- *Feature names* are case sensitive; they must be added to the command line exactly as they appear in these tables.
- To set a component's installation location, use the directory property to enter the full path to the installation directory. If you omit the directory property for a component, the component is installed to the default location listed in this table.
- The associated properties listed under Configuration Properties for Command Line Installations on page 71 may have to be included on the command line in order to configure the installed component.

Server-Side Integrations

The following table provides the feature name and directory property for each server-side component. The directory property specifies where a component is installed. If the directory property is omitted from the command, the component is installed to its default location.

Component	Epic Version	Feature Name	Directory Property	Default Location
Application Server	All supported versions	EpicAppServer	APPLICATIONSERVER_FILES	C:\Inetpub\wwwroot\AppServer\ **Note:** If you specify a location, the directory must be set to the root of the OnBase Application Server.
Signature Deficiencies	All supported versions	SignatureDeficienciesServer	APPLICATIONSERVER_FILES	C:\Inetpub\wwwroot\AppServer\ **Note:** If you specify a location, the directory must be set to the root of the OnBase Application Server.

Client-Side Integrations

The following table provides the feature name and directory property for each client-side component. The directory property specifies where a component is installed. If the directory property is omitted, the component is installed to its default location.

Component	Epic Version	Feature Name	Directory Property	Default Location (on 64-bit systems)[a]
Healthcare Web Viewer	August 2018+	EpicWebViewer	EPIC_VIEWER_FILES	C:\Program Files (x86)\Hyland\Integration for Epic\Web Viewer\
Scan Acquisition Server	August 2018+	Epic85SAS	EPIC85_SAS_FILES	C:\Program Files (x86)\Hyland\Integration for Epic\v85\SAS\
Front Office Scanning	August 2018+	Epic85FOS	FRONTOFFICESCANNING_FILES	C:\Program Files (x86)\Hyland\Front Office Scanning\
EpicCare Link	All supported versions	EpicWeb	EPIC_WEB_FILES	C:\Program Files (x86)\Hyland\Integration for Epic\Web\
Signature Deficiencies	All supported versions	SignatureDeficienciesClient	EPIC_SIGNATURE_DEFICIENCIES	C:\Program Files (x86)\Hyland\Integration for Epic\SD4E\

a. On 32-bit systems, component files are installed to folders in the **Program Files** directory rather than the **Program Files (x86)** directory.

Configuration Properties for Command Line Installations

The following topics outline additional configuration properties you can apply to command line installations.

To make a property empty, set its value to an empty string on the command line. For example, set **EPIC_OVERWRITECONFIGFILE** to **1** to install the specified EpicIntegrations.config file. To prevent EpicIntegrations.config from being installed, enter the following on the command line to make the property empty: **EPIC_OVERWRITECONFIGFILE=""**

Note: If you omit a property when upgrading or reinstalling a component, the installer will apply the property value used the last time the component was installed on the current workstation or server.

Scan Acquisition Server Properties

The following table outlines configuration properties available for command line installations of the Scan Acquisition Server.

Property ID	Description
EPIC_OVERWRITECONFIGFILE	Indicates whether the file specified in the **EPIC_CONFIG_SOURCE_PATH** directory will be copied to the component's installation directory. Set this property's value to **1** to allow the specified configuration file to be copied to the installation directories. Otherwise, leave the property empty.
EPIC_CONFIG_SOURCE_PATH	Specifies the full path to a pre-configured EpicIntegrations.config file. When this property is specified and **EPIC_OVERWRITECONFIGFILE** is set to **1**, the specified configuration file is copied to the installation directory.

Front Office Scanning Properties

The following table outlines configuration properties available for command line installations of the Front Office Scanning integration.

Property ID	Description
EPIC_OVERWRITECONFIGFILE	Indicates whether the file specified in the **EPIC_CONFIG_SOURCE_PATH** directory will be copied to the component's installation directory. Set this property's value to **1** to allow the specified configuration file to be copied to the installation directories. Otherwise, leave the property empty.
EPIC_CONFIG_SOURCE_PATH	Specifies the full path to a pre-configured EpicIntegrations.config file. When this property is specified and **EPIC_OVERWRITECONFIGFILE** is set to **1**, the specified configuration file is copied to the installation directory.
EPIC_FOS_CONFIG_NETWORK_STORE_OPTION	Indicates whether the **EPIC_FOS_CONFIG_NETWORK_LOCATION** path will be set as the **EpicConfigFile** value in the Windows registry. Set this property's value to **1** to use the specified path as the **EpicConfigFile** registry value. Otherwise, leave the property empty.
EPIC_FOS_CONFIG_NETWORK_LOCATION	Specifies the full path to a shared EPICFOSCONFIG.xml file. When this property is specified and **EPIC_FOS_CONFIG_NETWORK_STORE_OPTION** is set to **1**, the installer creates a string value named **EpicConfigFile** in the following registry location: HKLM\SOFTWARE\Hyland\Front Office Scanning[a] The specified network location becomes the value for the **EpicConfigFile** registry key. Set this property to the network location where EpicFOSConfig.xml is accessible. Otherwise, leave the property empty.

Property ID	Description
FOS_LOCAL_DATASET_PATH	Specifies the local path where the dataset XML files for Front Office Scanning are located. The specified path is created on the installation machine. This value is also written to the **<SharePath>** element in EPICFOSCONFIG.xml. For example: **FOS_LOCAL_DATASET_PATH="C:\EPICFOS\Datasets"** **Note:** This value must be a path local to the installation machine in order for the installer to create it. Network (UNC) paths must be created by a network administrator. If no value is entered, the value is not valid, or the property is not included at all, then no path is created and EPICFOSCONFIG.xml is not updated.

a. Assuming Registry Editor is opened using C:\Windows\SysWow64\regedt32.exe on a 64-bit system. If you open Registry Editor using C:\Windows\system32\regedt32.exe on a 64-bit system, then the registry location is HKLM\SOFTWARE\Wow6432Node\Hyland\Front Office Scanning.

EpicCare Link Integration Properties

The following table outlines configuration properties available for command line installations of the EpicCare Link integration.

Property ID	Description
EPIC_OVERWRITE_WEBCONFIG_FILE	Indicates whether the file specified in the **EPIC_WEBCONFIG_SOURCE_PATH** directory will be copied to the component's installation directory. Set this property's value to **1** to allow the specified configuration file to be copied to the installation directories. Otherwise, leave the property empty.
EPIC_WEBCONFIG_SOURCE_PATH	Specifies the full path to a pre-configured OnBaseEpicWeb.config file. When this property is specified and **EPIC_OVERWRITE_WEBCONFIG_FILE** is set to **1**, the specified configuration file is copied to the installation directory.

Scheduling Overview

Scheduling processing for off-hours is an automated way to conserve system resources. Processing can be accelerated if the process is run from the database server.

Caution: Ensure that scheduled processes are not configured to run at the same time as a scheduled database backup. The database is locked while performing backups, preventing any processes from running.

Note: Purging documents from Document Maintenance can also be scheduled. For more information, see the **System Administration** module reference guide or help file.

Two types of processing activities may be scheduled with the Scheduler: a Process Format or a Process Job.

- A Process Format is used in processing modules and in scanning modules to specify how OnBase processes data being imported into OnBase. A Process Format is, basically, one individually-configured process.
- A Process Job is one or more Process Formats that have been configured to run sequentially. A Process Job does not have to consist exclusively of a single type of Process Format; it can contain multiple Process Formats from any module that allows scheduling.

Note: Process Formats created from Document Imaging sweep or scan from disk processes cannot be included in a Process Job.

Configuring & Using the Scheduler

Requirements for Configuring/Running a Scheduled Process

To configure a scheduled process, either a Process Format or a Process Job, a user must belong to a User Group with the **Client** and **Client Scheduler** product rights, and he/she must have rights to use the appropriate processing module. A scheduled process can be configured on any OnBase Client workstation, not just the processing workstation or a workstation running with the **-SCHED** command line switch.

To run a scheduled process, OnBase must be running with the -**SCHED** or -**SCHEDINST** command line switch on the processing workstation in order for the scheduled process to be executed at the configured time. The user account logged onto OnBase at this time needs only the **Client** product right in order for the process to be performed.

For more information on using command line switches with your OnBase solution, see the **Command Line Switches** module reference guide.

Using the -SCHED and -SCHEDINST Switches

This section explains the difference between the **-SCHED** and **-SCHEDINST** command line switches.

-SCHED

Some process formats or jobs can be scheduled to run automatically. The -SCHED switch causes the Client to queue these scheduled process formats and jobs for later processing; if the machine running the OnBase Client in Scheduler mode (i.e., running the OnBase Client with the -SCHED command line switch applied) is also the processing workstation, then the process formats or jobs will run at their scheduled times.

In order for the scheduled process format or job to be run, OnBase must be running in Scheduler mode on the processing workstation. If OnBase is not running, or if OnBase is not running in Scheduler mode, then the scheduled processes will not run.

A process format or job can be scheduled from any OnBase Client workstation by a user with the proper rights.

-SCHEDINST

The -SCHEDINST command line switch is very similar to the basic -SCHED switch. When you apply the -SCHEDINST switch to a Client shortcut, you can specify that the selected instance of the OnBase Client should only process jobs assigned to that Client instance’s specific instance name.

The format of the switch is -SCHEDINST="MyProcName", where MyProcName is the name of a specific processing instance. The OnBase Client that this switch is applied to will be unable to process any scheduled jobs that are not configured with a **Specific Processing Instance** of MyProcName.

A process format or job can be scheduled from any OnBase Client workstation by a user with the proper rights.

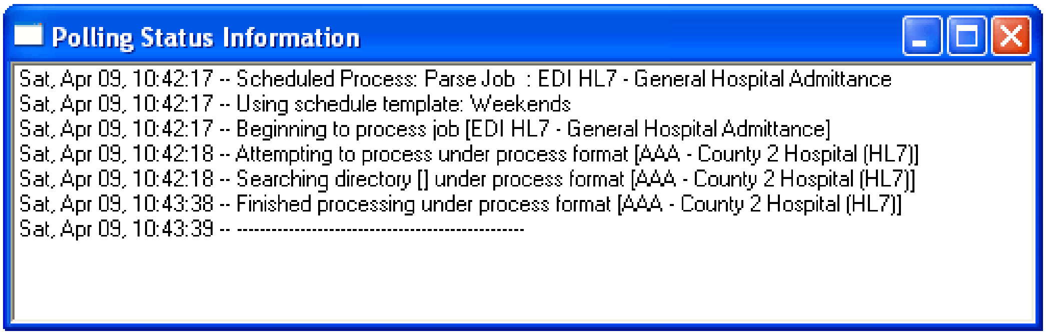
Note: If a scheduled process is assigned to a specific processing instance, it must be run from a client using the -SCHEDINST command line switch. If you try to run this process from a client using the -SCHED switch instead, the process will not be executed.

Verifying the Scheduler is Running

To verify that the Scheduler is running on the processing workstation, click **Window | Polling Status Information** in the OnBase Client.

Note: The **-SCHED** or **-SCHEDINST** command line switch must be applied to the Client shortcut to use this option.

The **Polling Status Information** window is displayed. Information about scheduled processes is displayed in it as the process is run. If this window exists, the Scheduler is running.



Another way to verify the Scheduler is running is to select **Window | System Status**. Both **Process Server Mode** and **Scheduler Mode** will be displayed as **YES**.

Running Multiple Scheduled Processes

Tip: Attempting to run more than one process job or format at once in the same session will result in a dramatic drop in all processing speeds. It is recommended to run a single automated process at a time.

If multiple jobs are configured, they can be performed sequentially in one OnBase Client session on the same workstation. Multiple sessions of the OnBase Client can be run simultaneously on one workstation to process these jobs in parallel; these sessions will coordinate processing tasks to ensure that each job is processed and that a job is not processed more than once.

In order to process jobs in parallel on multiple sessions of the OnBase Client, each session must be OnBase version 9.0 or later. If any one of the sessions is running an earlier version of OnBase, then none of the other sessions will perform any processing while it is processing.

Scheduled Process Configuration Reports

A user belonging to a User Group with the proper rights can run a Scheduled Processes Configuration Report.

This report provides information on all of the scheduled processes (process formats and process jobs) that have been scheduled to run. It is organized by processing workstation, and displays a weekly, monthly and end-of-month schedule, with jobs listed in order by starting time. Once run, this report is stored in OnBase as a document belonging to the **SYS Configuration Reports** Document Type.

Tip: It is considered a best practice to run a new Scheduled Process configuration report each time a new process (such as process format or process job) is scheduled. With the information stored in this report, troubleshooting and communications with Technical Support are greatly improved. Additionally, Configuration Reports are stored in OnBase, so there is a historical record of the structure of your OnBase solution.

For more information on Configuration Reports, including the Scheduled Processes Configuration Report, see the **System Administration** module reference guide or help file.

Working With Process Formats

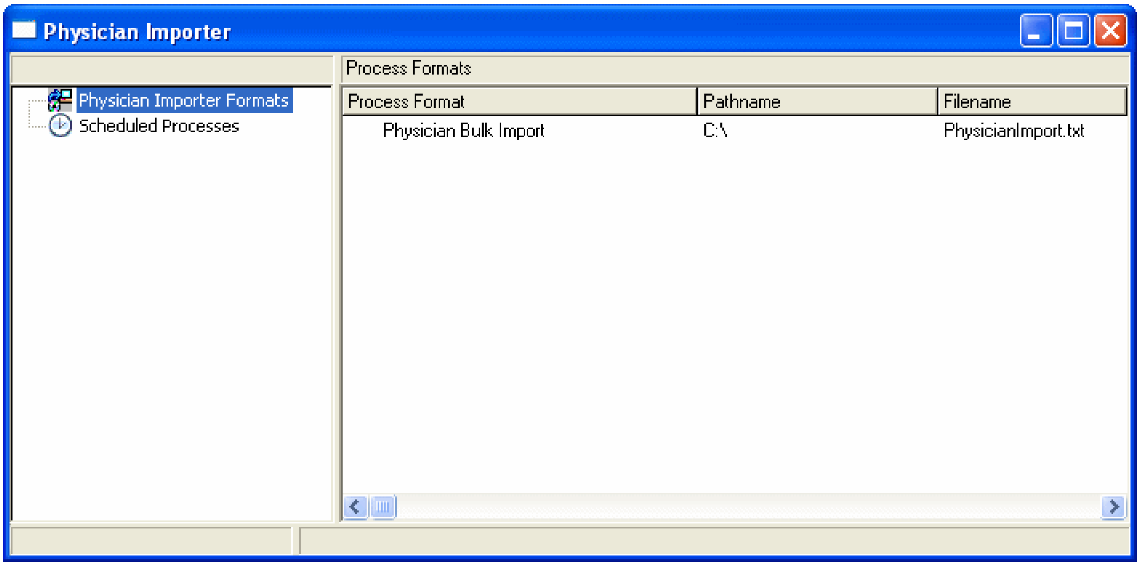
A Process Format is used in processing modules and in scanning modules to specify how OnBase processes data being imported into OnBase. A Process Format is, basically, one individually-configured process.

Creating a Scheduled Process Format

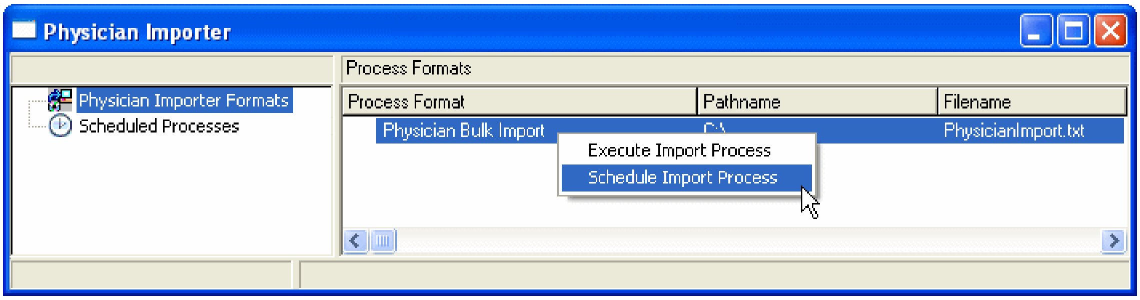
You can add a format to the Scheduler from its process queue by selecting the process format and selecting **Schedule Import Process** from the right-click menu.

For example:

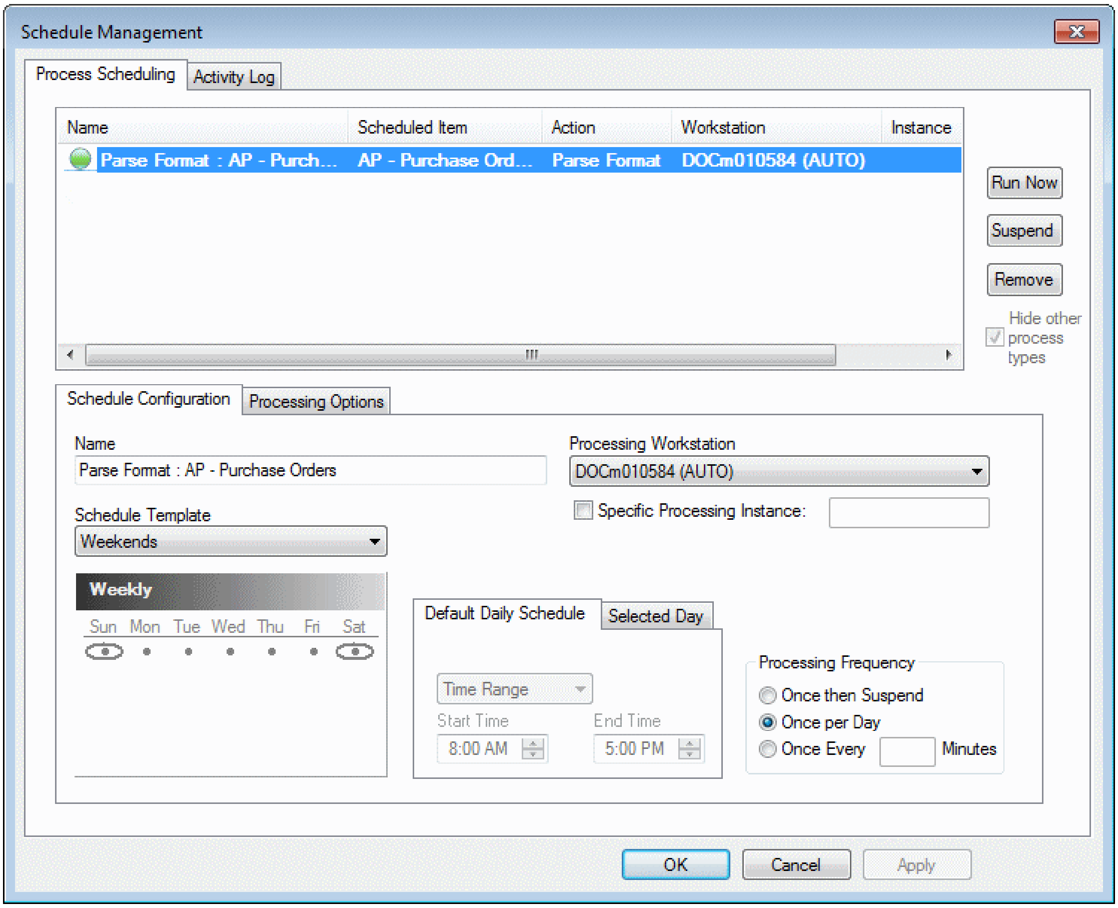
In the OnBase Client, click **Processing | Physician Importer**. The **Physician Importer** window is displayed.



Select the process format you would like to add to the Scheduler, then right-click and select **Schedule Import Process**.



The **Schedule Management** window is displayed.



A new Process Format is added to the **Scheduled Items** box. It is automatically selected.

By default, all scheduled Process Formats (e.g., COLD Process Formats, DIP Process Formats, etc.) are displayed in the **Scheduled Items** box when scheduling a new Process Format. For information on viewing only the Process Formats for the currently-selected process type, see Viewing Scheduled Processes on page 88.

Schedule Configuration

The first options that must be configured for the scheduled process are the Schedule Configuration options on the **Schedule Configuration** tab. This tab is displayed by default.

1. In the **Name** field, enter a name for the scheduled process.
2. Using the **Processing Workstation** drop-down, select the workstation that will be used to run the scheduled process.

Note: This workstation will need to be running with the **-SCHED** or **-SCHEDINST** command line switch in order to run the scheduled process.

3. If you always want the scheduled process to be run from a specific instance of the OnBase Client, select the **Specific Processing Instance**, then enter the name of the instance in the **Specific Processing Instance** text field.

Note: If you select the **Specific Processing Instance** option but leave the **Specific Processing Instance** text field blank, the scheduled process can be run from any instance of the OnBase Client.

4. Using the **Schedule Template** drop-down, select one of the schedule templates for the process or select **<Custom Schedule>** to manually configure the schedule for this process.

Note: For information on creating a **Custom Schedule** or **Schedule Template**, see below.

5. Select how often you would like the scheduled process to run by selecting one of the Processing Frequency radio buttons.
   - **Once then Suspend**. The scheduled item will be processed once, then the scheduled process is suspended.
   - **Once per Day**. The scheduled item will be processed once per day.

Note: If the scheduled item is modified, the process may be run again on the same day.

   - **Once every "" Minutes**. The scheduled item is processed in the interval (measured in minutes) entered in the field. The maximum number of minutes that can be entered is 99999.

Caution: This option is only supported when the **Default Daily Schedule** is set to **Time Range**. If your **Default Daily Schedule** is set to **Specific Time**, the scheduled item will only be processed at the specified time.

6. When you are finished setting the **Schedule Configuration** options, click **Apply**.

Calendar

The calendar is used to select the day(s) on which a scheduled process should be run.

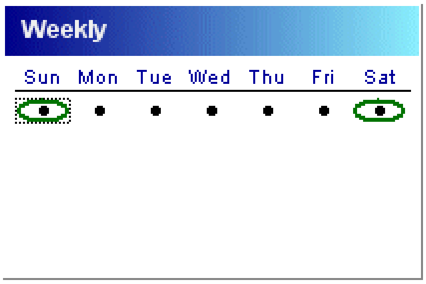
Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly** (Day-Relative). Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).

- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

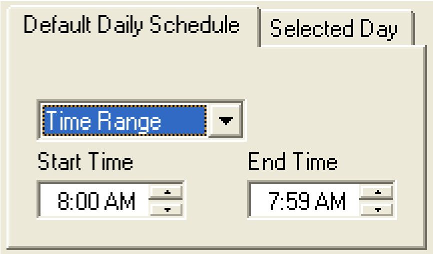


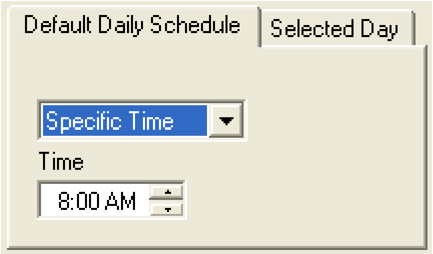
Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



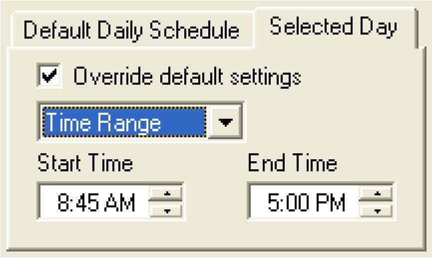


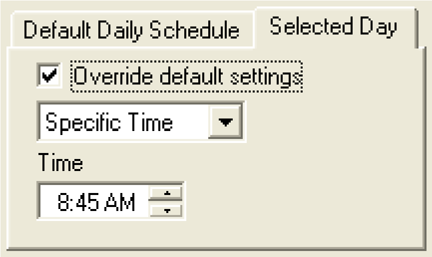
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.





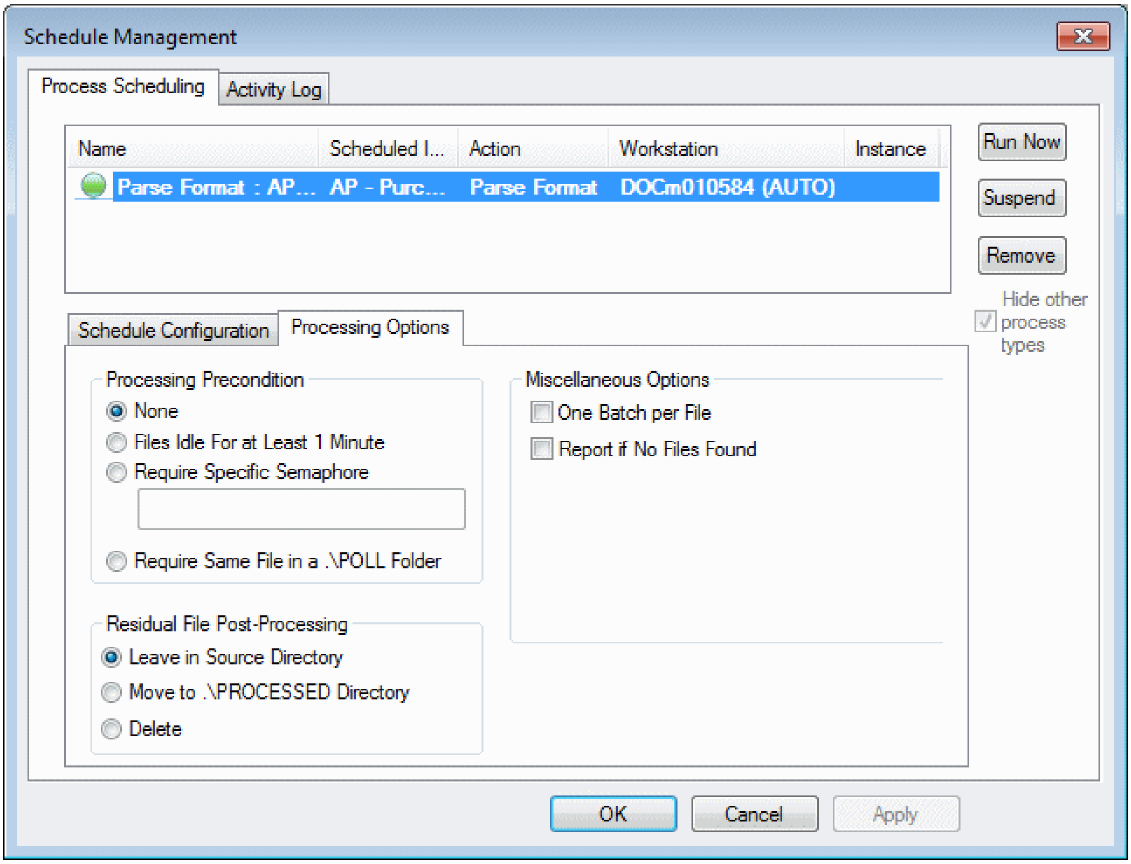
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Processing Options

After the Schedule Options are configured on the Schedule Configuration tab, you must configure the Processing Options.

1. From the **Process Scheduling** tab of the **Schedule Management** window, click the **Processing Options** tab to display the Processing Options.



2. Set the following Processing Options.

Option	Description
Processing Precondition	The **Processing Precondition** options allow you to specify the conditions that must be met before processing can begin. **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **None**. If this option is selected, no processing precondition is necessary. • **Files Idle For at Least 1 Minute**. Select to indicate that processing must begin after the file indicated in the **Default File Name** of the processing format has been idle for at least one minute. • **Require Specific Semaphore**. Select to indicate that processing must begin after a trigger file is detected. The trigger file can be any file type/size/label and can be written to any location on the network. OnBase will only begin processing the processing file indicated in the **Default File Name** of the process format after the trigger file has been detected. How processing is triggered (definition of the file location and/or time variable) is defined by a semaphore. A semaphore is a technique for coordinating or synchronizing polling activity. A maximum of 255 characters can be entered in this field. The trigger file is deleted after processing. **Note:** If the trigger file is being accessed over FTP, it will not be deleted.

Option	Description
Processing Precondition (cont.)	• **Require Same File in a .\POLL Folder**. Select to indicate that processing must begin after a POLL file has been written to a specifically-configured POLL folder. The POLL file must appear in a folder labeled **POLL**, and the POLL folder must be created as a subfolder of the **Default Directory** of the process format. The name of the POLL file must be exactly identical to the name of the file to be processed. The value in the **Default File Name** field will be used to locate the POLL file. When OnBase locates the POLL file, the processor will attempt to process any file with that same name in the **Default Directory**. For example: The **Default File Name** is ***.txt**, and the **Default Directory** is **C:\ProcessFiles**. The file to be processed is stored in this directory. For this example, the file is named **pf11x74.txt**. The POLL file should be placed in **C:\ProcessFiles\POLL**, and named exactly the same as the process file (**pf11x74.txt**). OnBase will search **C:\ProcessFiles\POLL** for a file that matches the **Default File Name** of ***.txt**. Upon finding the **pf11x74.txt** file, the processor will return to the **C:\ProcessFiles** directory and search for the file named **pf11x74.txt**. This is the file that will be processed. **Note:** This option is not supported for use with the Directory Import Processor.

Option	Description
Residual File Post-Processing	The Residual File Post-Processing options allow you to specify how residual files are processed (that is, files that have been processed but not deleted from the directory, such as read-only files). **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **Leave in Source Directory**. Select to leave any residual files in the folder they originated in. • **Move to .\PROCESSED Directory**. Select to move any residual files to the OnBase-generated **PROCESSED** folder located in the same folder the files were originally in. **Caution:** Depending on your system's configuration, processed files may be automatically deleted after an import process is run. In this situation, the processed files will not be moved to the **PROCESSED** folder because they have already been deleted from the folder they originated from. Depending on the processor you are using, you may be able to avoid this behavior by modifying the configuration of your import processor, or by marking the files to be processed as read-only. • **Delete**. Select to delete any residual files (that is, files that have been processed but not deleted from the directory) from the folder they originated in. **Note:** The **Delete** option is not available for Scheduled Sweeps or Scan from Disk processes.

Option	Description
Miscellaneous Options	The **Miscellaneous Options** allow you to specify special scheduling options specific to the selected process. The availability of these options varies depending on the type of processor being scheduled. Many processing modules do not have some or all of these options. **Note:** No **Miscellaneous Options** are available for scheduled PDF conversions, Advanced Capture processes, Full-Page OCR processes or scheduled commits. • **One Batch per File**. Select to process each index file as one batch when multiple index files are being processed at once. This option is not supported for use with the Directory Import Processor. • **Report if No Files Found**. Select to create a Verification Report if no files are found when a scheduled format or job is run. **Note:** The **Report if No Files Found** option is only available when the **None** radio button is selected for the **Processing Precondition**. It is not available for scheduled **Sweep** or **Scan from Disk** processes. • **Document Type**. Available for certain scheduled **Sweep** processes. Use the drop-down to select the Document Type of processed documents. • **Scan Format**. Available for certain scheduled **Scan from Disk** processes. Use the drop-down to select the scan format to be used when processing documents. By default, the processor will use the last scan format that was assigned to the scan queue being processed. **Note:** Only **Kofax** scan formats can be selected from this drop-down.

Option	Description
OCR Options	The **OCR Options** allow you to specify the configuration options for a scheduled Advanced Capture or Full-Text OCR process. **Note:** These options are only available when scheduling an Advanced Capture or Full-Page OCR process (that is, the batch's scan queue has been configured for Advanced Capture or Full-Page OCR). • **Full-Text OCR**. Select this radio button if you are scheduling a Full-Text OCR process. • **Advanced Capture**. Select this radio button if you are scheduling an Advanced Capture process. • **Process Ad Hoc OCR Documents**. Select this radio button if you would like to perform Advanced Capture or Full-Text OCR on documents in the ad hoc batch status queues (**Ad Hoc Advanced Capture** or **Awaiting Ad Hoc OCR**).

3. When you are finished configuring the Process Options, click **Apply**.

Viewing Scheduled Processes

By default, only scheduled process formats and jobs of the currently-selected process type will be displayed in the **Schedule Management** window. To view scheduled process formats and jobs of all process types, deselect the **Hide other process types** check box.

To open the **Schedule Management** window, perform one of the following actions:

- Click **Processing | Scheduler | Schedule Management**.
- Open the **Scheduled Processes** queue and double-click on a scheduled process
- Right-click on a process format in its process queue and select **Schedule Format**.

Note: Additional Product Rights are required to view a scheduled purge process. For more information, see the **System Administration** module reference guide or help file.

Modifying a Scheduled Process Format

Once a scheduled process has been created, it can be modified as needed.

To modify an existing scheduled process:

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select the process to be modified from the **Scheduled Items** box.

3. Modify the settings on the **Schedule Configuration** and **Process Options** tabs as needed.

   For more information on the options on these tabs, see Schedule Configuration on page 79 and Processing Options on page 101.

Tip: You can modify the **Schedule Configuration** settings for multiple processes at the same time. To do so, use the **Shift** or **Ctrl** keyboard keys to select multiple processes before modifying the **Schedule Configuration** settings.

4. Once you have finished modifying the scheduled process, click **Apply**.

Deleting a Scheduled Process Format

Caution: If you delete a process format or process job that is scheduled, it will be deleted from the list of scheduled jobs.

Scheduled processes can be deleted from the **Schedule Management** window.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select the scheduled process(es) you would like to delete from the **Scheduled Items** box and click **Remove**.
3. Click **Apply**.

Running/Suspending a Scheduled Process Format

From the **Schedule Management** window, a scheduled process can be run immediately or it can be suspended.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select one or more scheduled processes from the **Scheduled Items** box.
   - To run the process(es) now, click **Run Now**. The processes are run the next time the processing workstation is polled.
   - To suspend the process(es), click **Suspend**. To resume one or more suspended processes, select those processes and click **Resume**.

   An icon is displayed next to each scheduled process in the **Scheduled Items** box that indicates its status.

Icon	Description
	**Run Now** - Indicates that the user has clicked the **Run Now** button to cause the process to execute now instead of waiting for its scheduled time to run.

Icon	Description
	**Suspend** - Indicates a suspended process. The process will not run until a user selects it and clicks **Resume**.
	**Active** - Indicates an active scheduled process. An active process may be waiting to run or it may have already run at its scheduled time.
	**Error** - Indicates a process with a configuration error.

3. Click **Apply**.

Working With Process Jobs

A Process Job is one or more Process Formats that have been configured to run sequentially. A Process Job does not have to consist exclusively of a single type of Process Format; it can contain multiple Process Formats from any module that allows scheduling.

A few notes about Process Jobs:

- Process formats must be created before they can be added to a job.
- AutoFill Keyword Import Processors can be scheduled from any **Process Job Queue**.
- Process Formats created from Document Imaging sweep or scan from disk processes cannot be included in a Process Job.

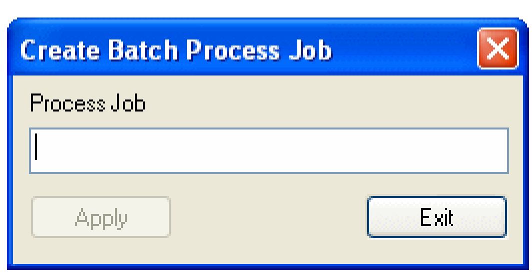
Creating a Job

You can add a job to the Scheduler from a process queue (that is, the COLD Queue, the EDI Queue, and others).

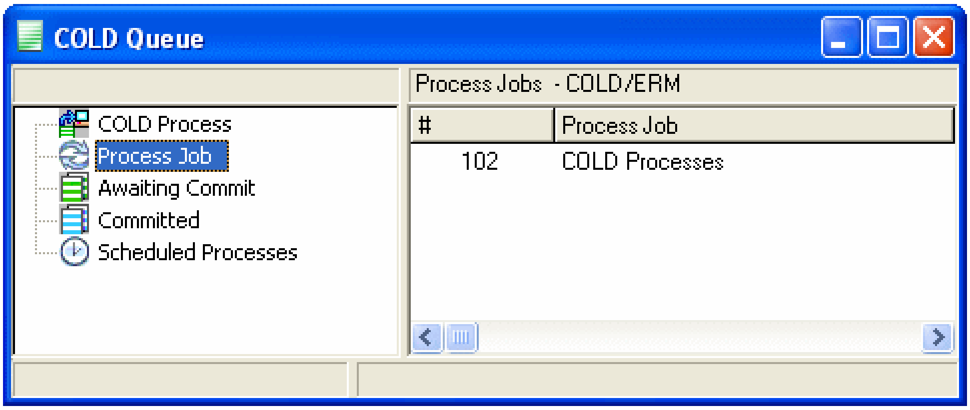
To create a job, follow these steps:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on the window and select **Create New Job**.

   Or, from the process queue, select **Process Job** and right-click in the **Process Jobs** window and select **Create New Job**. The **Create Batch Process Job** dialog box is displayed.



2. Enter a name for the job in the **Process Job** field and click **Apply**. The job is added to the process queue and is listed in the **Process Jobs** window.



Note: The process name must be 75 characters or fewer.

Note: If you are using the OnBase Client as a Windows Service, you must restart the OnBase Client after adding a new scheduled process.

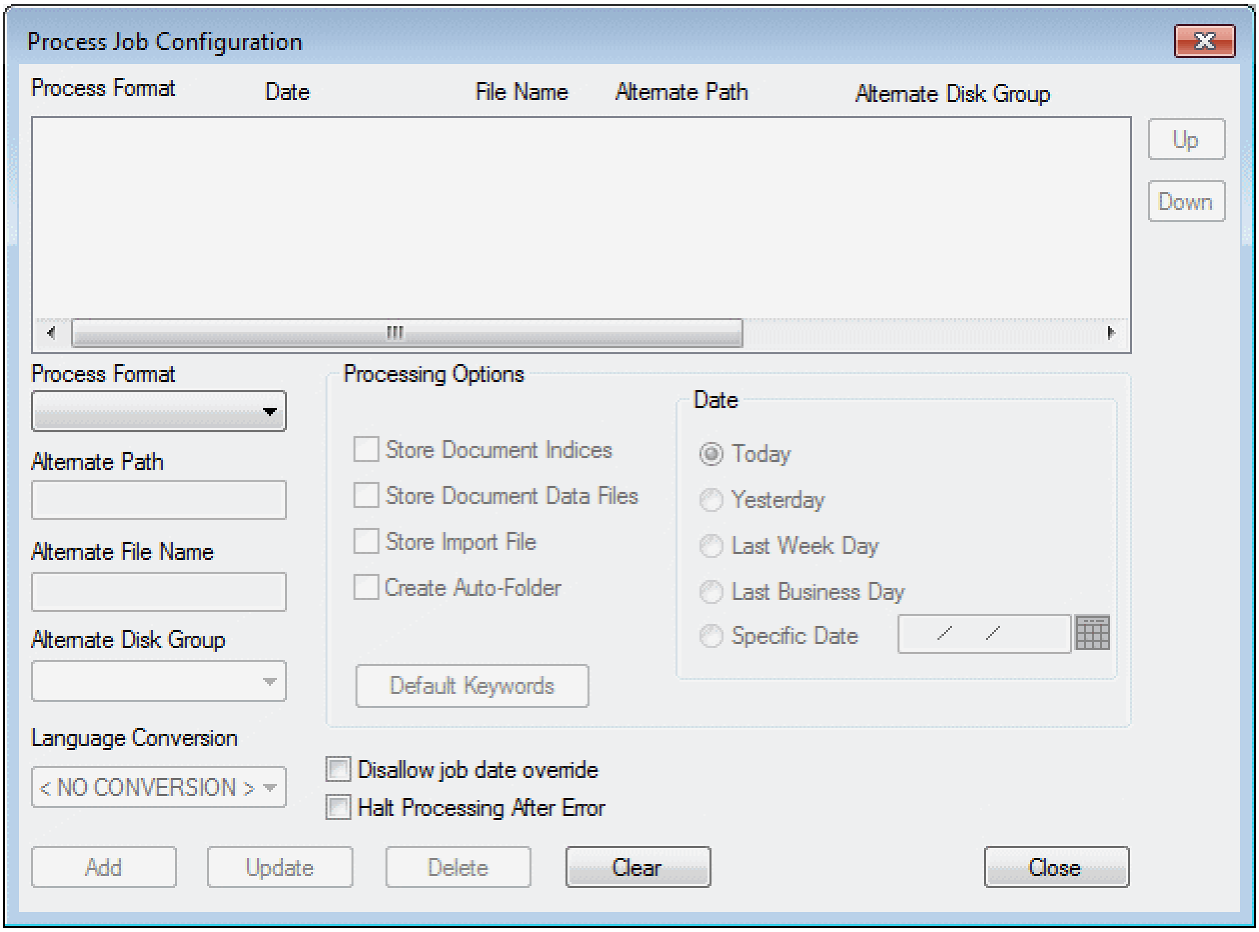
Configuring a Job

To configure a job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

   Or, select the job to be configured from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

   The **Process Job Configuration** window is displayed.



2. Configure a process format to add to the job:

Process Job Parameter	Description
Process Format	Select the process format to be incorporated in the process job. All available process formats are listed.
Alternate Path	Enter an alternate path to the data to be processed (i.e., the **Default Directory**) to use instead of the **Default Directory** configured for the selected process format. If an alternate path is not specified, the process format's **Default Directory** is used.
Alternate Filename	Enter an alternate file name for the data to be processed (i.e., the **Default File Name**) to use instead of the **Default File Name** configured for the selected process format. If an alternate file name is not specified, the process format's **Default File Name** is used.
Alternate Disk Group	Enter an alternate Disk Group to store the data being processed instead of the Disk Group configured for the selected process format. If an alternate Disk Group is not specified, the process format's default Disk Group is used.
Language Conversion	Select the language associated with the ASCII code page that created the import file. If a language conversion is not specified, the process format's **Language Conversion** setting is respected. **Note:** This setting is only used for legacy language conversions. The option **<NO CONVERSION>** should be selected when configuring process settings.
Store Document Indices	Select this option to store the processed documents in the database, along with their Keyword Values and document name. This option is enabled by default.
Store Document Data Files	Select this option to move the data file to the configured Disk Group after the process is complete. This option is enabled by default.
Store Import File	Select to store a copy of the index file used to import documents into OnBase for archive purposes. **Note:** This option is not supported for use with modules that do not support the **Store Import File** processing option. See the configuration section of the appropriate module reference guide or help file to find out whether or not the **Store Import File** processing option is supported for a module.

Process Job Parameter	Description
Create Auto Folder	Select to provide the ability to Auto-Folder documents upon processing. See the **Folders** module reference guide or help files for additional information regarding Auto-Foldering. **Note:** Not all processors offer the ability to Auto-Folder documents upon processing.
Default Keywords	Click the **Default Keywords** button to select Keyword Types and Values that are displayed in the Batch Name for that Process Job when it is processed. These Keyword Types and Values are also displayed at the top of the Verification Report for that job. **Note:** Only Keyword Types that have been configured for Document Types used in the Process Job are selectable. **Note:** If a check process format is configured as part of the job, the **Default Keywords** button is disabled when the job is selected.
Disallow job date override	Select this option to prevent users from overriding the specified job date.
Halt Processing After Error	Select this option to halt processing for the process job if the configured process format generates an error. Any other process formats configured for the process job will not be processed.
Date	These settings allow a user-defined **Document Date** to be stored for the processed documents. This date is used as the **%D** parameter that appears in the document's Auto-Name string.

3. Click **Add**.
4. Repeat Step 2 for each process format that you would like to add to the job.

   Process jobs are run in the order in which they display on the screen. Re-sequence a job by selecting it and clicking the **Up** or **Down** buttons.

Once you've added all process formats to the job, click **Close**.

Scheduling a Job

Once you have created and configured a job, you must schedule it in order for it to automatically run. A job is scheduled in almost the same way that a process format is scheduled.

To schedule a job, you must first open the **Schedule Management** window. To open it:

- From a process queue, select **Process Job** and then select the job to be scheduled in the **Process Jobs** window. Right-click and select **Schedule Job**.

- From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Schedule Job**.

Schedule Configuration

The first options that must be configured for the scheduled job are the Schedule Configuration options on the **Schedule Configuration** tab. This tab is displayed by default.

1. In the **Name** field, enter a name for the scheduled process.
2. Using the **Processing Workstation** drop-down, select the workstation that will be used to run the scheduled job.

Note: This workstation will need to be running with the **-SCHED** or **-SCHEDINST** command line switch in order to run the scheduled job.

3. Using the **Schedule Template** drop-down, select a schedule template for the process or select **<Custom Schedule>** to manually configure the schedule for this process.

Note: For information on creating a schedule template, see below.

   To create a custom schedule, you will need to use the **Calendar** to select the day(s) you would like the scheduled job to run on and then you will need to specify the time the scheduled job will run using the **Default Daily Schedule** and/or **Selected Day** tabs. For more information, see those sections below.

4. Select how often you would like the scheduled job to run by selecting one of the **Processing Frequency** radio buttons.
   - **Once then Suspend**. The scheduled item will be processed once, then the scheduled process is suspended.
   - **Once per Day**. The scheduled item be processed once per day.

Note: If the scheduled item is modified, the process may be run again on the same day.

   - **Once every "" Minutes**. The scheduled item is processed in the interval (measured in minutes) entered in the field. The maximum number of minutes that can be entered is 99999.
5. When you are finished setting the Schedule Configuration options, click **Apply**.

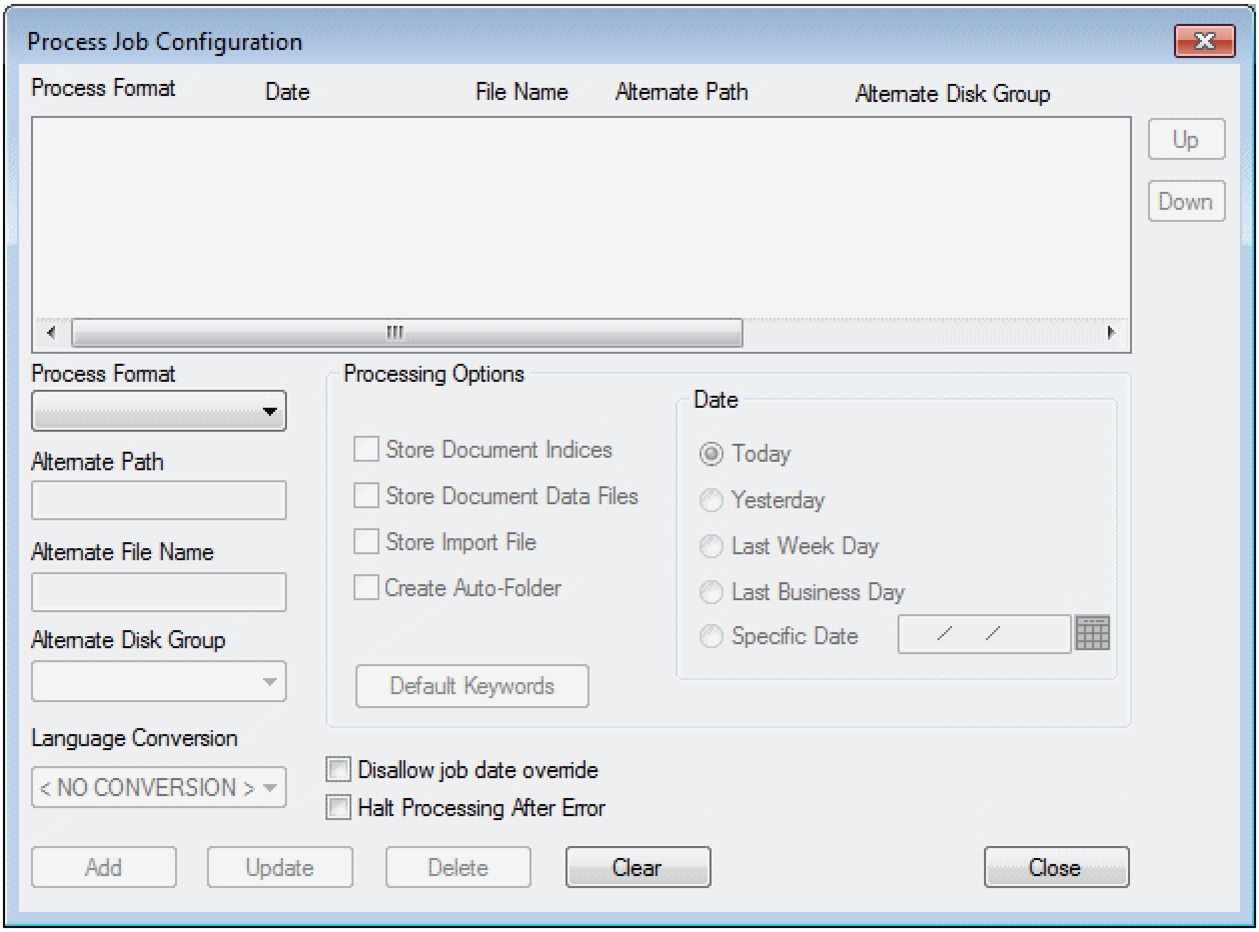
Calendar

To configure a job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

   Or, select the job to be configured from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

   The **Process Job Configuration** window is displayed.



2. Configure a process format to add to the job:

Process Job Parameter	Description
Process Format	Select the process format to be incorporated in the process job. All available process formats are listed.
Alternate Path	Enter an alternate path to the data to be processed (i.e., the **Default Directory**) to use instead of the **Default Directory** configured for the selected process format. If an alternate path is not specified, the process format's **Default Directory** is used.
Alternate Filename	Enter an alternate file name for the data to be processed (i.e., the **Default File Name**) to use instead of the **Default File Name** configured for the selected process format. If an alternate file name is not specified, the process format's **Default File Name** is used.
Alternate Disk Group	Enter an alternate Disk Group to store the data being processed instead of the Disk Group configured for the selected process format. If an alternate Disk Group is not specified, the process format's default Disk Group is used.
Language Conversion	Select the language associated with the ASCII code page that created the import file. If a language conversion is not specified, the process format's **Language Conversion** setting is respected. **Note:** This setting is only used for legacy language conversions. The option **<NO CONVERSION>** should be selected when configuring process settings.
Store Document Indices	Select this option to store the processed documents in the database, along with their Keyword Values and document name. This option is enabled by default.
Store Document Data Files	Select this option to move the data file to the configured Disk Group after the process is complete. This option is enabled by default.
Store Import File	Select to store a copy of the index file used to import documents into OnBase for archive purposes. **Note:** This option is not supported for use with modules that do not support the **Store Import File** processing option. See the configuration section of the appropriate module reference guide or help file to find out whether or not the **Store Import File** processing option is supported for a module.

Process Job Parameter	Description
Create Auto Folder	Select to provide the ability to Auto-Folder documents upon processing. See the **Folders** module reference guide or help files for additional information regarding Auto-Foldering. **Note:** Not all processors offer the ability to Auto-Folder documents upon processing.
Default Keywords	Click the **Default Keywords** button to select Keyword Types and Values that are displayed in the Batch Name for that Process Job when it is processed. These Keyword Types and Values are also displayed at the top of the Verification Report for that job. **Note:** Only Keyword Types that have been configured for Document Types used in the Process Job are selectable. **Note:** If a check process format is configured as part of the job, the **Default Keywords** button is disabled when the job is selected.
Disallow job date override	Select this option to prevent users from overriding the specified job date.
Halt Processing After Error	Select this option to halt processing for the process job if the configured process format generates an error. Any other process formats configured for the process job will not be processed.
Date	These settings allow a user-defined **Document Date** to be stored for the processed documents. This date is used as the **%D** parameter that appears in the document's Auto-Name string.

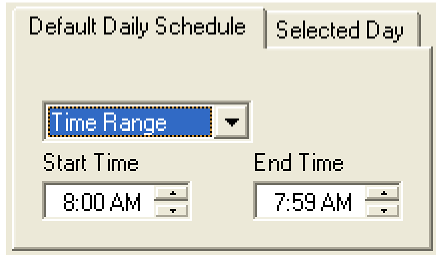
3. Click **Add**.
4. Repeat Step 2 for each process format that you would like to add to the job.

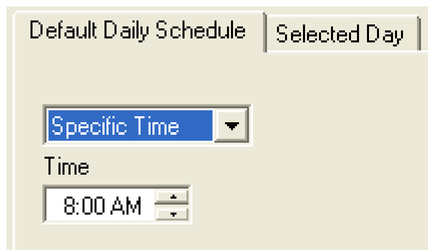
   Process jobs are run in the order in which they display on the screen. Re-sequence a job by selecting it and clicking the **Up** or **Down** buttons.

Once you've added all process formats to the job, click **Close**.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



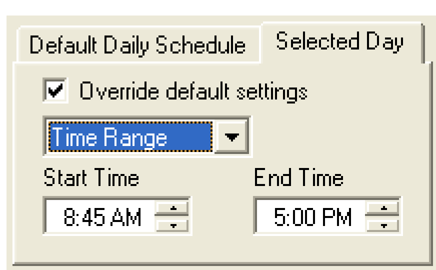


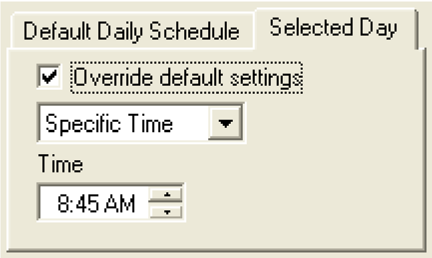
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.





The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

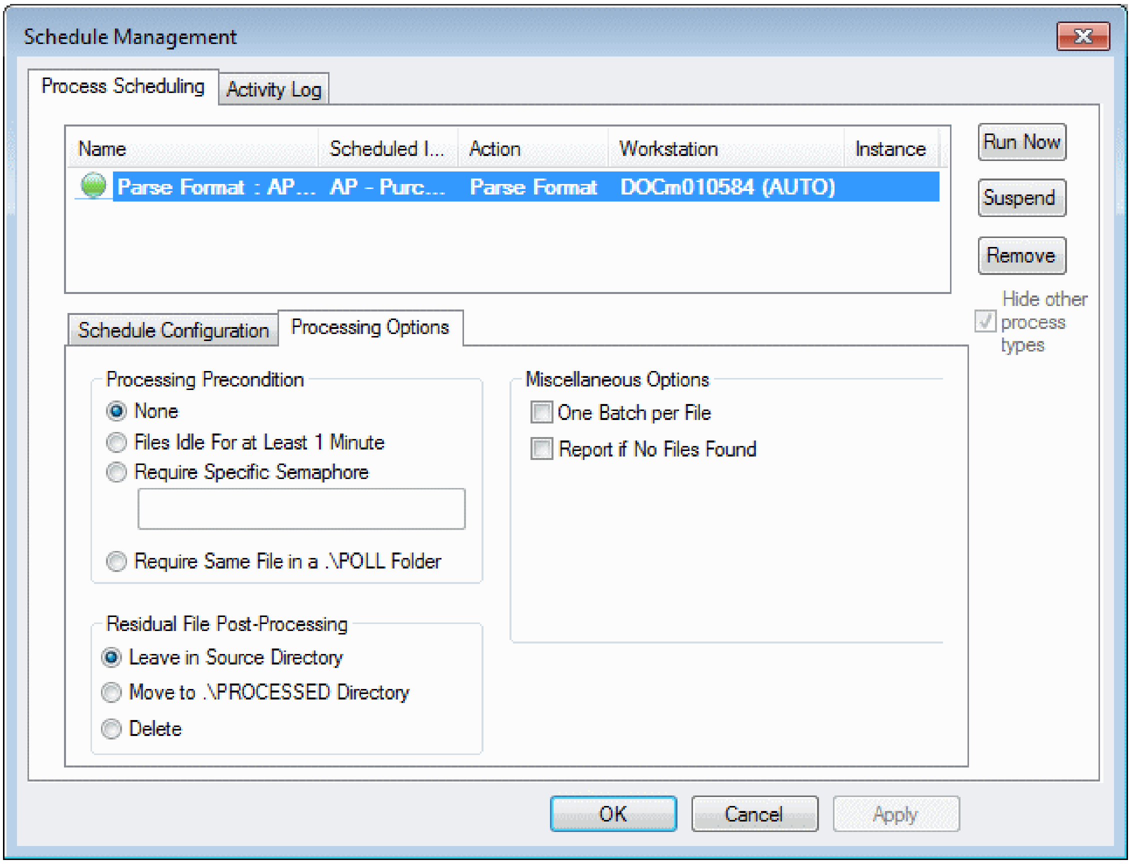
Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Processing Options

After the Schedule Options are configured on the **Schedule Configuration** tab, you must configure the Processing Options.

1. From the **Process Scheduling** tab of the **Schedule Management** window, click the **Processing Options** tab to display the Processing Options.

Note: This tab is only available if a single process is selected. If multiple processes are selected, the **Processing Options** tab is disabled.



2. Set the following Processing Options.

Option	Description
Processing Precondition	The **Processing Precondition** options allow you to specify the conditions that must be met before processing can begin. **Note:** These options are not available for scheduled PDF conversions, Advanced Capture processes, Full-Text OCR processes or scheduled commits. • **None**. If this option is selected, no processing precondition is necessary. • **Files Idle For at Least 1 Minute**. Select to indicate that processing must begin after the file indicated in the **Default File Name** of the processing format has been idle for at least one minute. • **Require Specific Semaphore**. Select to indicate that processing must begin after a trigger file is detected. The trigger file can be any file type/size/label and can be written to any location on the network. OnBase will only begin processing the processing file indicated in the **Default File Name** of the process format after the trigger file has been detected. How processing is triggered (definition of the file location and/or time variable) is defined by a semaphore. A semaphore is a technique for coordinating or synchronizing polling activity. A maximum of 255 characters can be entered in this field. The trigger file is deleted after processing. **Note:** If the trigger file is being accessed over FTP, it will not be deleted.

Option	Description
Processing Precondition (cont.)	• **Require Same File in a .\POLL Folder**. Select to indicate that processing must begin after a POLL file has been written to a specifically-configured POLL folder. The POLL file must appear in a folder labeled **POLL**, and the POLL folder must be created as a subfolder of the **Default Directory** of the process format. The name of the POLL file must be exactly identical to the name of the file to be processed. The value in the **Default File Name** field will be used to locate the POLL file. When OnBase locates the POLL file, the processor will attempt to process any file with that same name in the **Default Directory**. For example: The **Default File Name** is ***.txt**, and the **Default Directory** is **C:\ProcessFiles**. The file to be processed is stored in this directory. For this example, the file is named **pf11x74.txt**. The POLL file should be placed in **C:\ProcessFiles\POLL**, and named exactly the same as the process file (**pf11x74.txt**). OnBase will search **C:\ProcessFiles\POLL** for a file that matches the **Default File Name** of ***.txt**. Upon finding the **pf11x74.txt** file, the processor will return to the **C:\ProcessFiles** directory and search for the file named **pf11x74.txt**. This is the file that will be processed. The POLL file is deleted after processing. **Note:** This option is not supported for use with the Directory Import Processor.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Residual File Post-Processing</td><td>The Residual File Post-Processing options allow you to specify how the processor will handle files that are left in the original folder after the import process has been run.
Leave in Source Directory. Select to leave processed read-only files in the folder they originated in.
Move to ..\PROCESSED Directory. Select to move all processed files, regardless of read-only status, to the OnBase-generated PROCESSED folder located in the same folder the read-only files were originally in.
Caution: Depending on your system’s configuration, processed files may be automatically deleted after an import process is run. In this situation, the processed files will not be moved to the PROCESSED folder because they have already been deleted from the folder they originated from.

This behavior can be avoided by modifying the configuration of your import processor, or by marking the files to be processed as read-only.
Delete. Select to delete the read-only files from the folder they originated in.</td></tr>
<tr><td>Miscellaneous Options</td><td>The Miscellaneous Options options allow you to specify special scheduling options. Not all options are available for all processes.
One Batch per File. Select to process each index file as one batch when multiple index files are being processed at once.
Note: This option is not supported for use with the Directory Import Processor.
Report if No Files Found. Select to create a Verification Report if no files are found when a scheduled job is run.</td></tr>
</table>

3. When you are finished configuring the Process Options, click **Apply**.

Viewing a Job

All scheduled process formats and jobs can be viewed in the **Schedule Management** window.

By default, the **Hide other process types** check box is enabled, so only the selected process type’s process formats or process jobs are displayed.

To open the **Schedule Management** window:

- Click **Processing | Scheduler | Schedule Management** from the OnBase Client.
- From a process queue, select **Process Job** and then select a job in the **Process Jobs** window. Double-click on the job to display the process formats that compose it.

- From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed.

Modifying a Job

To modify an existing job:

From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Configure Job**.

Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Configure Job**.

The **Process Job Configuration** dialog box is displayed.

Note: If you are using the OnBase Client as a Windows Service, you must restart the OnBase Client after modifying a scheduled process.

Note: For more information on configuring a process job, see Configuring a Job on page 92 and Scheduling a Job on page 94.

Renaming a Job

To rename an existing job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Rename Job**.

   Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Rename Job**.

   The **Rename Process Job** dialog box is displayed.
2. Enter the new name for the job and click **OK**.

Deleting a Job

Caution: If you delete a process format or process job that is scheduled, it will be deleted from the list of scheduled jobs.

To delete an existing job:

1. From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Delete Job**.

   Or, select the job to be modified from the **Process Jobs** window in the process queue, right-click and select **Delete Job**.

   A confirmation message is displayed.
2. Click **OK**. The job is deleted.

Running/Suspending a Job

From the **Schedule Management** window, a job can be run immediately or it can be suspended.

1. Open the **Schedule Management** window from the OnBase Client by clicking **Processing | Scheduler | Schedule Management**.
2. Select one or more jobs from the **Scheduled Items** box.
   - To run the jobs now, click **Run Now**. The selected jobs are run the next time the processing workstation is polled.
   - To suspend the jobs, click **Suspend**. To resume suspended jobs, click **Resume**.

   An icon is displayed next to each scheduled job in the **Scheduled Items** box that indicates its status.

Icon	Description
	**Run Now** - Indicates that the user has clicked the **Run Now** button to cause the job to execute now instead of waiting for its scheduled time to run.
	**Suspend** - Indicates a suspended job. The job will not run until a user selects it and clicks **Resume**.
	**Active** - Indicates an active scheduled job. An active job may be waiting to run or it may have already run at its scheduled time.
	**Error** - Indicates a job with a configuration error.

3. Click **Apply**.

A job can also be run immediately from the process format queue or the **Process Jobs** window.

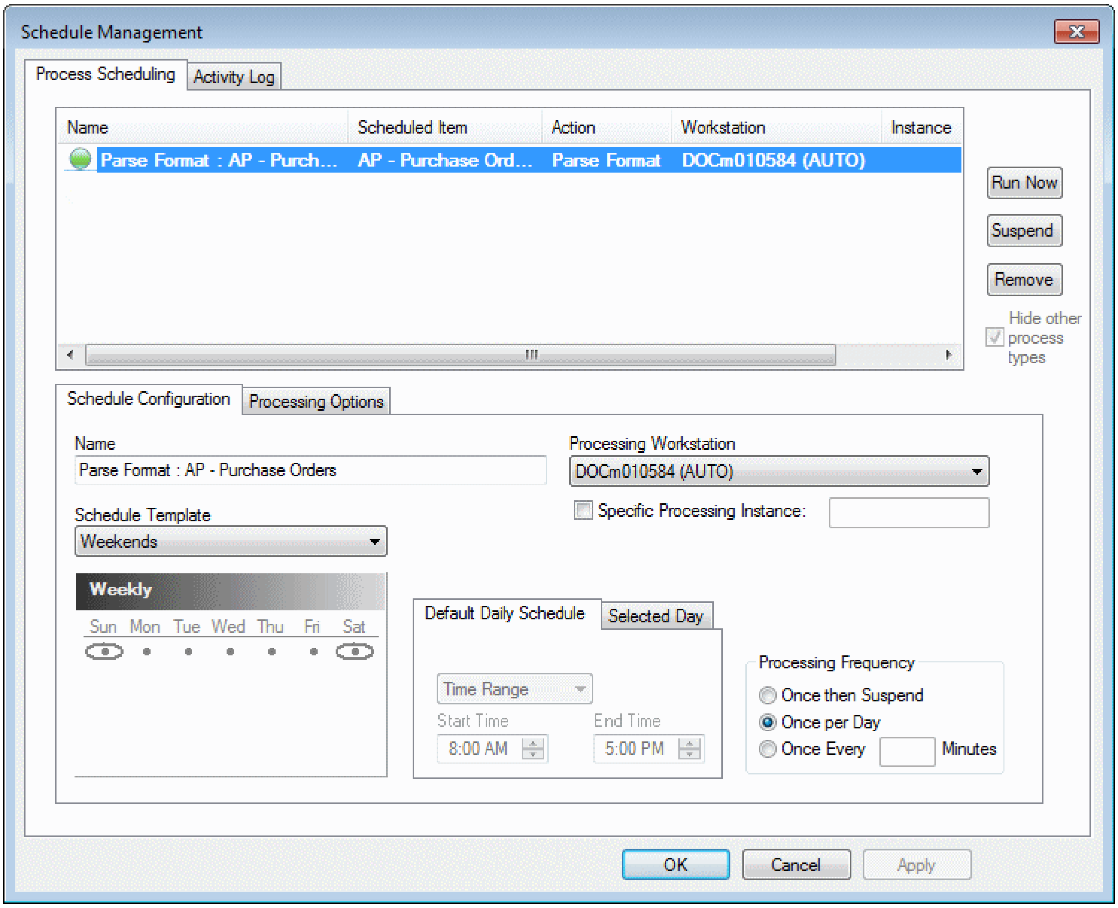
From the OnBase Client, click **Processing | Process Jobs**. The **Process Jobs** window is displayed. Right-click on a job and select **Process Job**.

Or, from a process queue, select **Process Job** and then select the job to be run in the **Process Jobs** window. Right-click in the **Process Jobs** window and select **Process Job**.

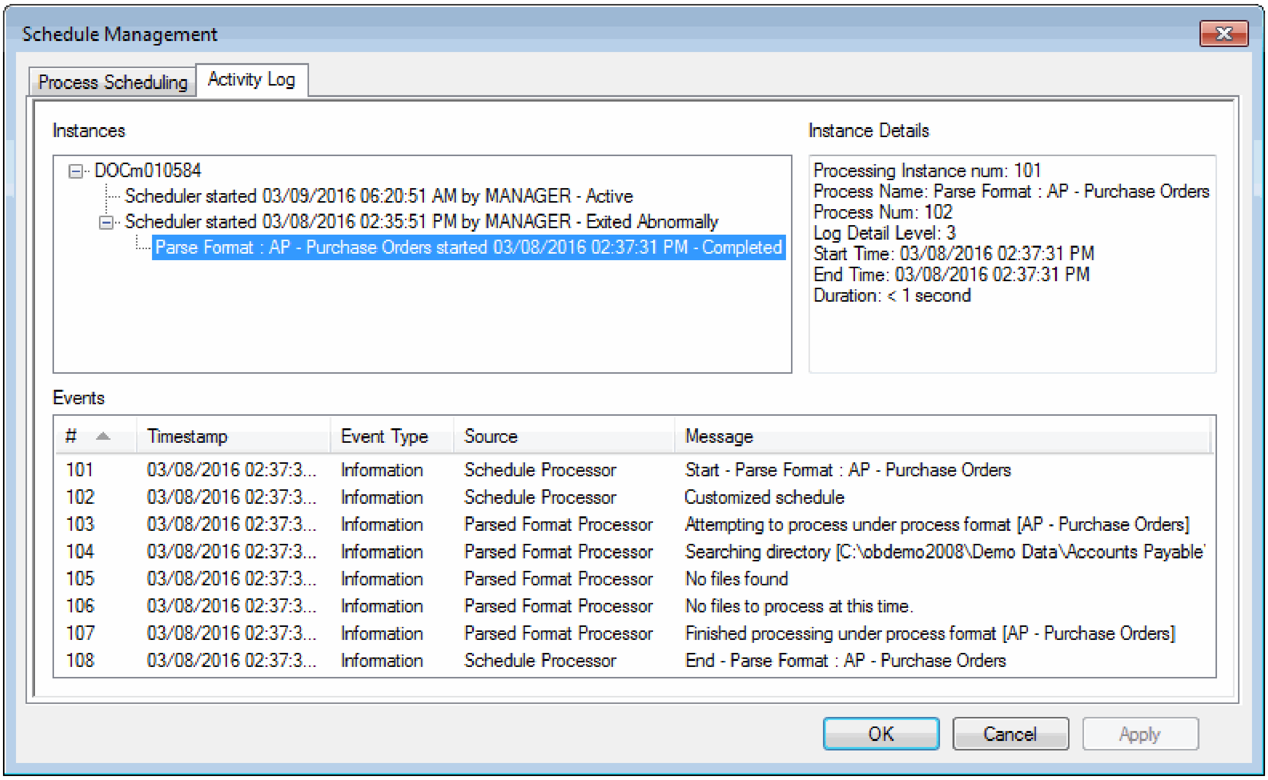
Viewing the Activity Log

The Activity Log provides visibility and control over the logging information generated during the execution of scheduled processes. To view the Activity Log, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Schedule Management**. The **Schedule Management** dialog box is displayed.



2. Click the **Activity Log** tab. The **Activity Log** is displayed.



Note: The **Activity Log** tab is only available if logging is enabled and at least one log entry exists.

3. Select a log entry to view more information about that processing instance. Details on the selected instance are displayed in the Instance Details section in the upper right corner of the dialog box, and details on each event within that instance are displayed in the Events section in the bottom of the screen.

Note: Depending on your assigned product rights, you may be able to delete unneeded entries from the Activity Log. See the User Group Configuration for Product Rights section of the **System Administration** documentation for information on product rights.

Creating Schedule Templates

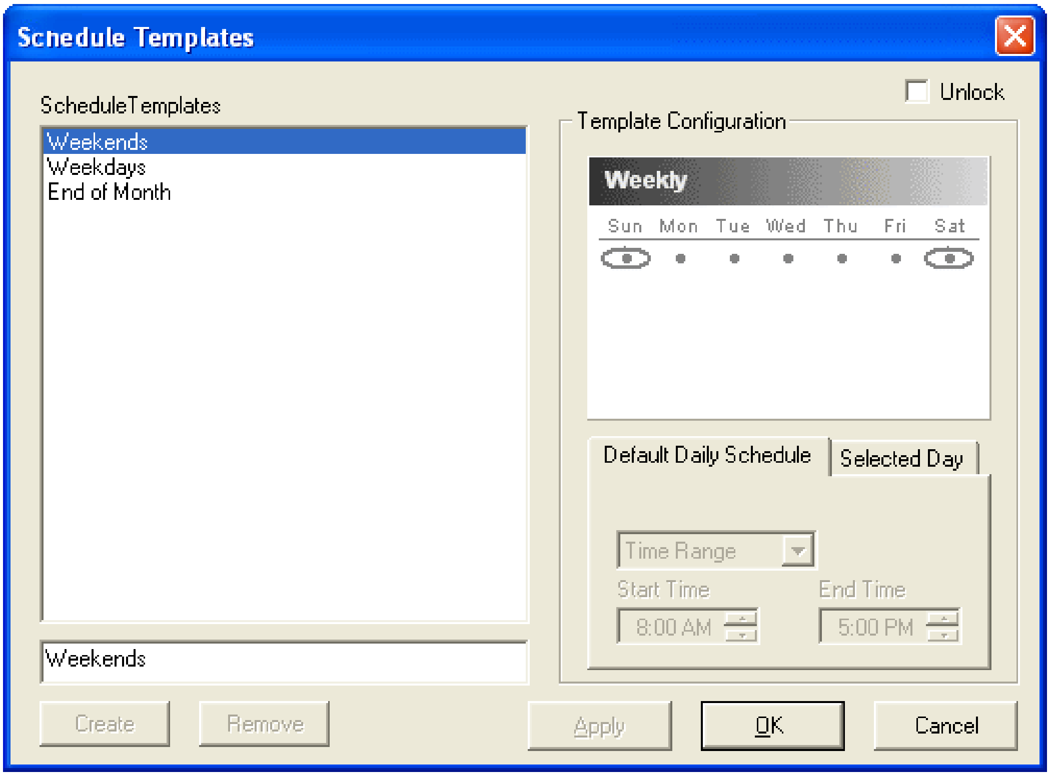
Creating Schedule Templates

A schedule template is used to create a processing schedule. These schedules can be used by multiple scheduled processes without having to be re-configured each time they are used.

Note: Any user with the Client and Client Scheduler product rights can create a schedule template. Once created, a schedule template is available to all users with Client and Client Scheduler product rights.

To create a schedule template:

1. From the OnBase Client, click **Processing | Scheduler | Schedule Templates**. The **Schedule Templates** window is displayed.



2. Enter a name for the new template and click **Create**.

Note: The maximum number of characters that can be used for a name is 80.

3. Configure the appropriate options. See the sub-sections below for more information on using the calendar, **Default Daily Schedule**, and **Selected Day** options under the **Template Configuration** area.
4. Once all Template Configuration options have been set, click **OK**.

To edit an existing template, select it from **Schedule Templates** list and select the **Unlock** check box. Once you have finished modifying it, click **OK**.

Calendar

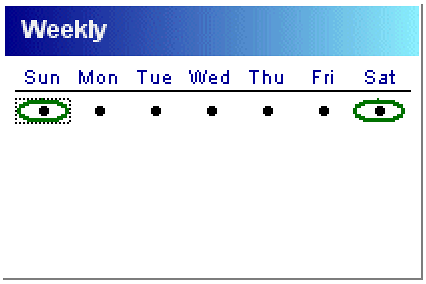
The calendar is used to select the day(s) on which a scheduled process should be run.

Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly** (Day-Relative). Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).
- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

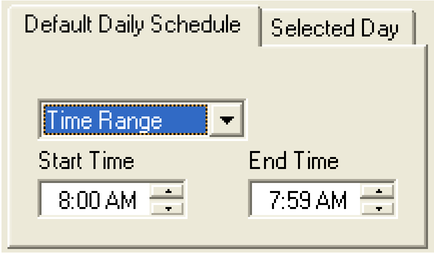


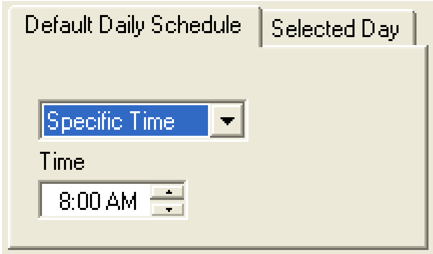
Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



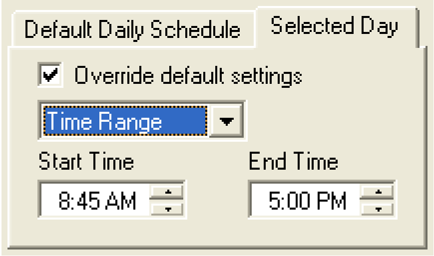


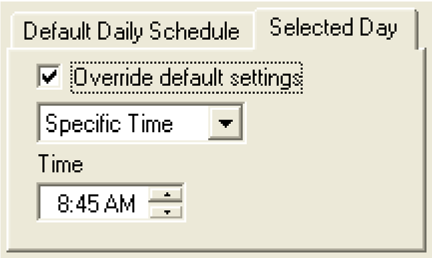
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.



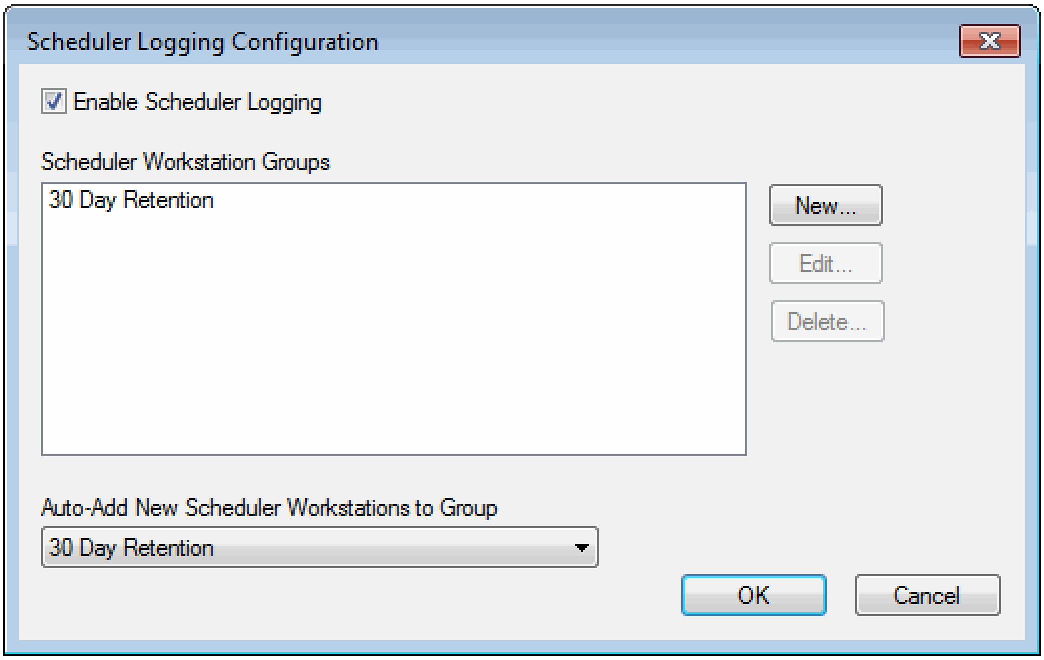


The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Configuring Schedule Logging

Schedule logging is controlled at the workstation group level. Each workstation used to perform scheduled processing can only be a member of a single workstation group, and the settings defined for a workstation group are applied to all workstations within that group. Scheduler logging is configured from the **Scheduler Logging Configuration** dialog box, available from the OnBase Client under **Processing | Scheduler | Logging Configuration**.



Note: This dialog box is only available for selection if your user account has been assigned the required product right. See the User Group Configuration for Product Rights section of the **System Administration** documentation for information on product rights.

Select the **Enable Scheduler Logging** option to perform scheduler logging for all scheduler workstation group that have enabled the **Enable Logging for Group** option. If this option is not selected, no scheduler logging is performed for any scheduler workstation group.

By default, there is a single group named **30 Day Retention**. Other groups can be created as needed, depending on the logging requirements of different types of processing workstations. See the following topics for more information on creating, editing, and deleting scheduler workstation groups:

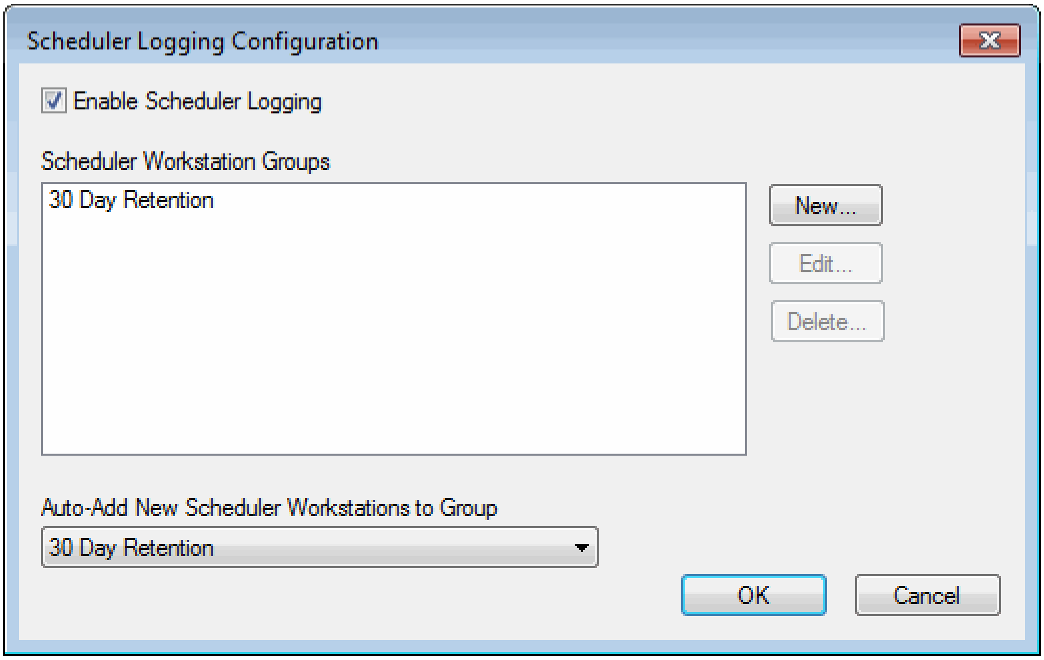
- See Creating a Scheduler Workstation Group on page 114 for more information on creating a new scheduler workstation group.
- See Editing a Scheduler Workstation Group on page 117 for more information on editing a scheduler workstation group.
- See Deleting a Scheduler Workstation Group on page 120 for more information on deleting a scheduler workstation group.

The **Auto-Add New Scheduler Workstations to Group** setting controls whether or not new scheduler workstations will automatically add themselves to a scheduler workstation group. Select a scheduler workstation group from the drop-down list to automatically add new processing workstation to that group, or select <none> to disable automatic addition. By default, this is set to the **30 Day Retention** group.

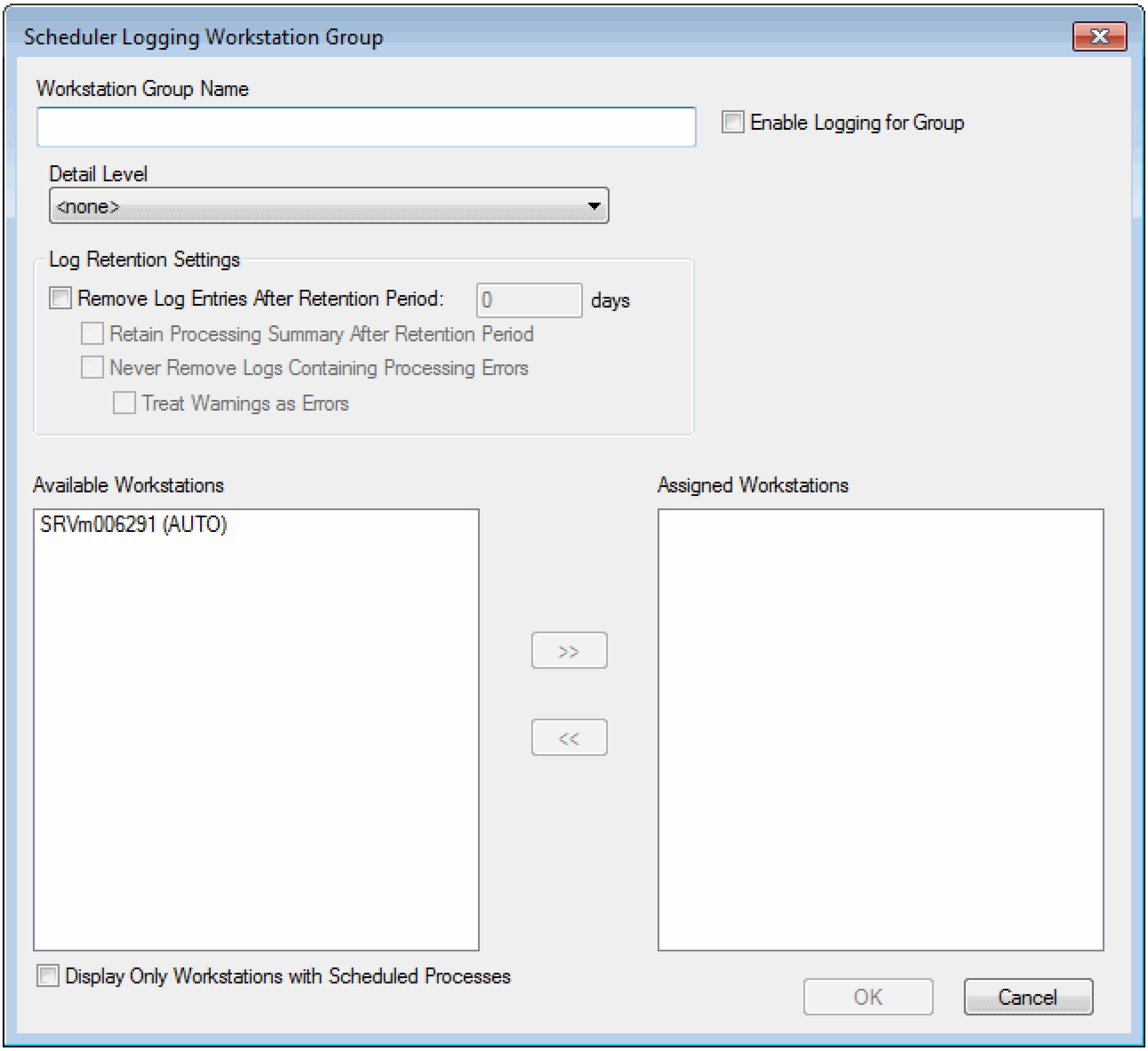
Creating a Scheduler Workstation Group

Scheduler workstation groups control how schedule logging is performed by the assigned workstations. To create a new scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Click **New**. The **Scheduler Logging Workstation Group** dialog box is displayed.



3. Type a name for the scheduler workstation group in the **Workstation Group Name** field.
4. Select the **Enable Logging for Group** option so that logging is performed for workstations in the group. If this option is not selected, logging is not performed for this scheduler workstation group.
5. Select the desired amount of data to be logged from the **Detail Level** drop-down list. The higher levels of detail are most useful for new processes or processes that are experiencing issues.

6. If desired, you can configure a retention period for log entries. The following options are available:

Option	Description
Remove Log Entries After Retention Period: _ days	Select this option and enter a number in the available field to remove log entries from the scheduler log after the specified number of days.
Retain Processing Summary After Retention Period	Select this option to retain the processing instance record after the retention period has passed and all of the record's log entries have been removed.
Never Remove Logs Containing Processing Errors	Select this option to prevent the retention period from being applied to any processing logs that reported an error. This can provide an administrator more time to analyze any recorded issues.
Treat Warnings as Errors	Select this option to treat warnings as errors for the purpose of log retention. When this option is selected, the retention period is not applied to any processing logs that reported a warning. **Note:** This option is only available if the **Never Remove Logs Containing Processing Errors** option is selected.

7. Select all workstations you want to assign to this scheduler workstation group from the **Available Workstations** list, then click the **>>** button. The selected workstations are added to the **Assigned Workstations** list.

   Because workstations can only be assigned to a single scheduler workstation group, the list of workstations in the **Available Workstations** list does not include any workstations that are already assigned to another scheduler workstation group.

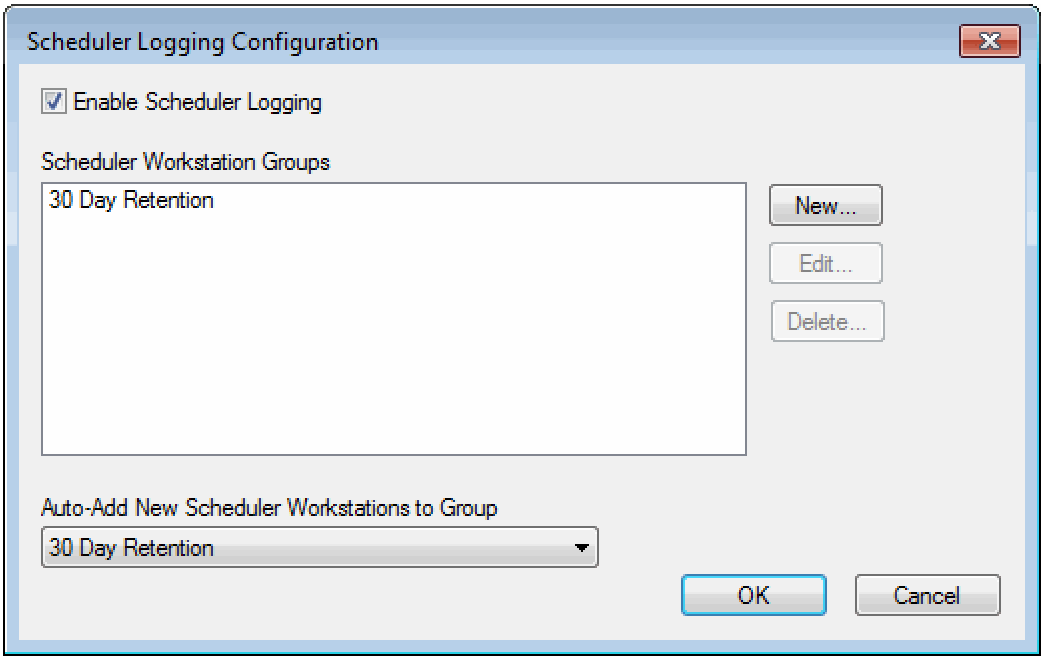
Tip: You can select the **Display Only Workstations with Scheduled Processes** option to limit the list of **Available Workstations** to those workstations that have scheduled processes assigned to them.

8. Click **OK**.

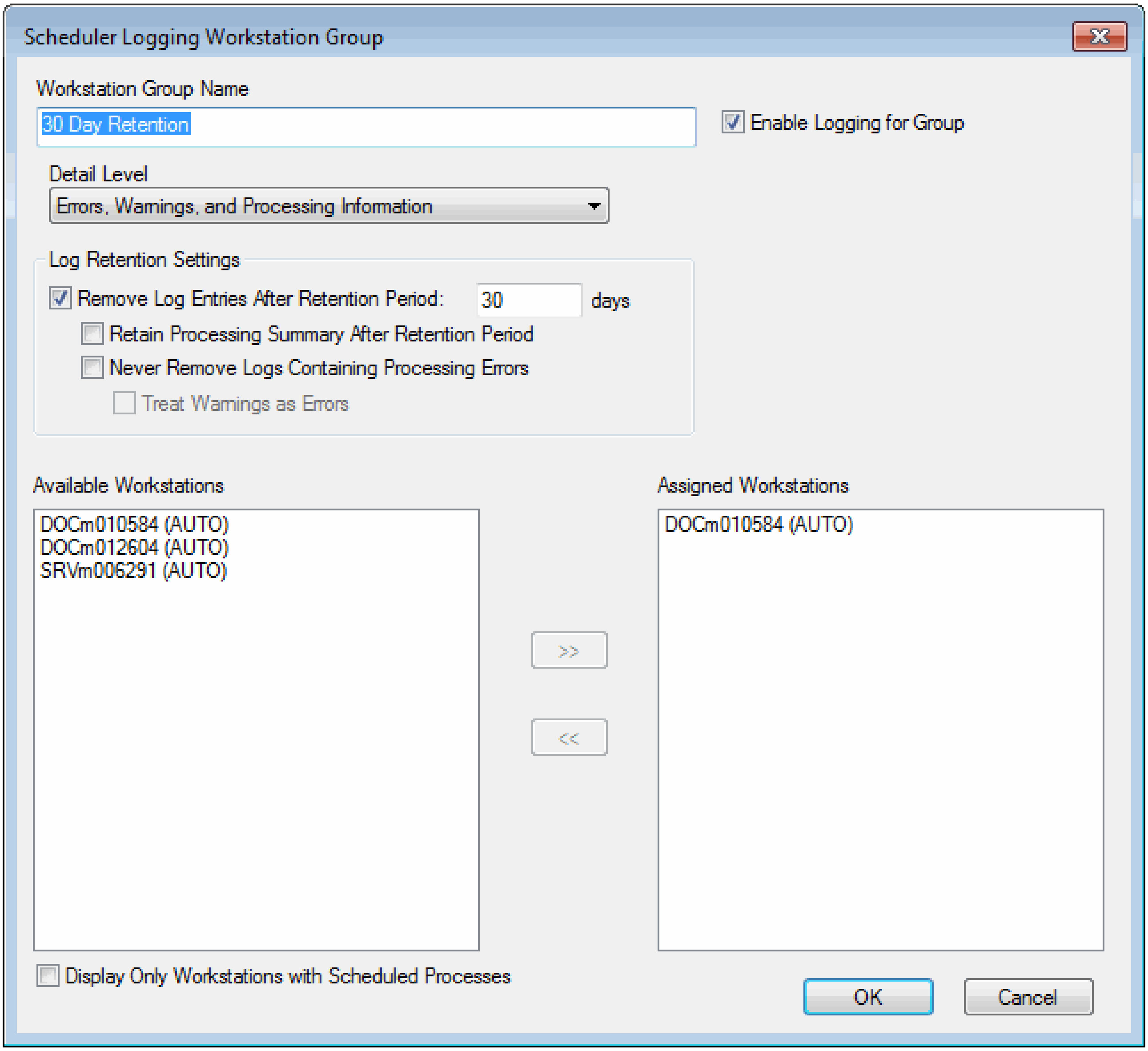
Editing a Scheduler Workstation Group

Scheduler workstation groups control how logging is performed by the assigned workstations. To edit an existing scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Select a scheduler workstation group and click **Edit**, or double-click on a scheduler workstation group. The **Scheduler Logging Workstation Group** dialog box is displayed.



3. Modify the scheduler workstation group's settings as desired. The following settings are available:

Option	Description
Workstation Group Name	The name of the scheduler workstation group.
Enable Logging for Group	The **Enable Logging for Group** option controls whether or not logging is performed for workstations in the group. Logging is only performed if this option is selected.
Detail Level	The **Detail Level** drop-down list controls the amount of data that is logged. Higher levels of detail are most useful for new processes or processes that are experiencing issues.
Remove Log Entries After Retention Period: _ days	When this option is selected, log entries are removed from the scheduler log after the specified number of days.
Retain Processing Summary After Retention Period	When this option is selected, the processing instance record is retained after the retention period has passed and all of the record's log entries have been removed.
Never Remove Logs Containing Processing Errors	When this option is selected, the retention period is not applied to any processing logs that have reported an error. This can provide an administrator more time to analyze any recorded issues.
Treat Warnings as Errors	When this option is selected, warnings are treated as errors for the purpose of log retention. The retention period is not applied to any processing logs that have reported a warning. **Note:** This option is only available if the **Never Remove Logs Containing Processing Errors** option is selected.
Available Workstations/ Assigned Workstations	The **Available Workstations** list contains all workstations that are available to be assigned to this scheduler workstation group. Because workstations can only be assigned to a single scheduler workstation group, the list of workstations in the **Available Workstations** list does not include any workstations that are already assigned to another scheduler workstation group. The **Assigned Workstations** list contains all workstations that have been assigned to this scheduler workstation group.

Option	Description
Display Only Workstations with Scheduled Processes	When this option is selected, the list of **Available Workstations** is limited to those workstations that have scheduled processes assigned to them.

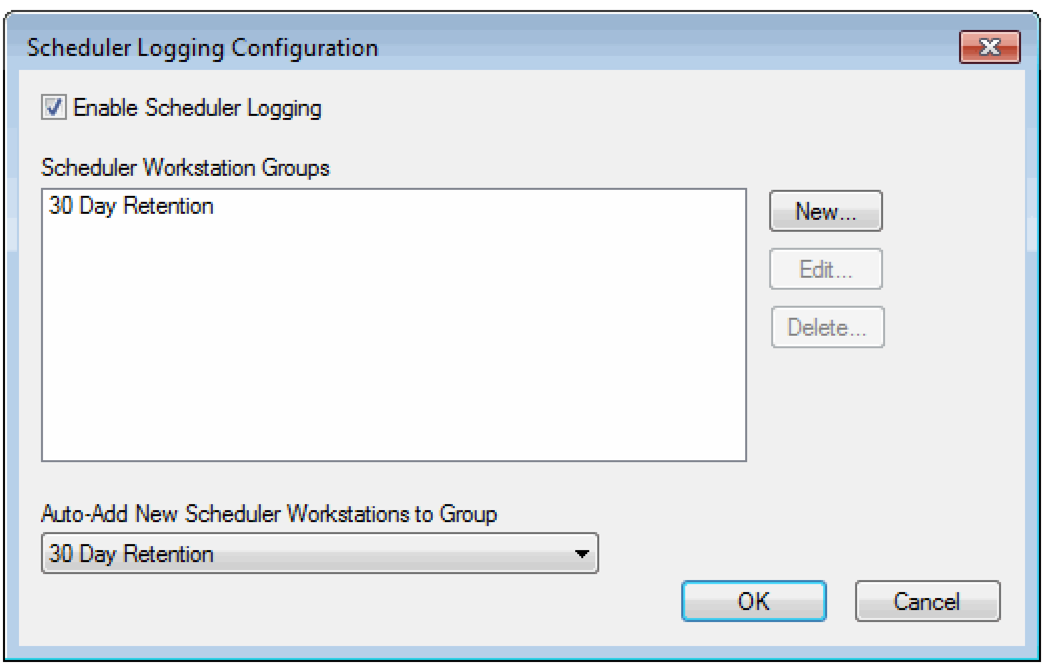
Note: After making a change to any of the options under **Log Retention Settings**, previously retained logs are rechecked to verify that they conform with the new settings. Logs which do not will be removed. For example, if you had previously configured the scheduler workstation group to **Retain Processing Summary After Retention Period** and then deselect that option, existing processing summaries older than the retention period will be removed.

4. Click **OK**.

Deleting a Scheduler Workstation Group

Scheduler workstation groups control how logging is performed by the assigned workstations. To delete a scheduler workstation group, follow these steps:

1. From the OnBase Client, click **Processing | Scheduler | Logging Configuration**. The **Scheduler Logging Configuration** dialog box is displayed.



2. Select a scheduler workstation group and click **Delete**. A confirmation dialog box is displayed.
3. Click **Yes**. The selected scheduler workstation group is deleted, and any workstations that were assigned to that group are available to be added to another scheduler workstation group.

Overview

The -EPICANALYSIS switch covers all actions dealing with deficiencies on documents. This switch burns the signatures and physician-provided information onto a document once all deficiencies on the document have been completed. The server runs approximately once every minute.

Steps

The -EPICANALYSIS server completes the following steps:

1. Retrieve all documents that have a deficiency where the DocDeficiency.DirtyKey field does not equal zero.

Note: The DirtyKey field is non-zero after a user has modified a deficiency (e.g., an analyst created a new deficiency, a physician completed his/her deficiency, etc.).

2. If OnBase is configured to send Epic deficiency status updates using HL7, load each document's deficiencies for the purpose of sending update messages.

   HL7 settings are configured on the **HL7** tab under **Medical | Medical System Settings**. For more information, see HL7 Settings on page 213.
3. Update each deficiency's DirtyKey field to zero.
4. Once all the document's deficiencies have been completed (i.e., signed by the physician), burn the deficiencies onto the document. Use the DocDeficiency row to output the necessary physician information onto the document beneath the deficiency.

   When burning deficiencies onto text documents, an image rendition of the text document is created as a new revision, and deficiencies are burned onto the image.
5. After burning, move each deficiency to the CompletedDocDfcy table for auditing purposes.
6. Burn standard notes onto the document. Notes are replaced with text stating **See append note #XXX** where the note was originally placed. The actual note information is printed onto the pages that are appended to the end of the document.
7. After burning, remove note database rows.

Note: The burning of deficiencies and notes creates new revisions/renditions of the document. Previous revisions/renditions are not removed from the system.

OnBase
Foundation EP5

Signature Deficiencies for Epic

Administration Guide

Foundation EP5

Complete the procedures in this chapter to integrate Signature Deficiencies for Epic with the Epic application.

Before You Begin

1. Ensure the OnBase Application Server is installed and functioning.
2. Configure the OnBase HL7 module to receive and send HL7 messages.

Configuration Rights

To configure your system for medical records, you must have the **Medical Records** configuration right. See the System Administration module reference guide for information about configuration rights.

HL7 Module Configuration

This section describes specific HL7 configuration requirements for Signature Deficiencies for Epic. See the **HL7** module reference guide for HL7 configuration information.

Note: Signature Deficiencies for Epic does not support the use of assigning authorities with chart ID numbers. If the **Chart ID #** chart data field is configured to require an assigning authority, then the Analysis and Signing components will be unable to retrieve documents using the values passed from Epic.

Import Processes

HL7 import processes must be configured to create charts for documents that are entering OnBase. Create an HL7 import process and assign it the **Medical Records Chart** message action. From the message action options, select **Create if needed, update if existing**. You can also use the **Medical Records Chart** message action to update existing charts only and merge existing charts.

The HL7 module can create and update physician users from a master file using the **Create/ Update Physician from Master File** import process. Once processed into OnBase, new physician users must be activated from the **New Physician Queue**. For information about activating physician users created by an HL7 import process, see New Physician Queue on page 180.

For detailed information about these and other HL7 message actions, see the **HL7** module reference guide.

Export Destination

HL7 must be configured to send HL7 messages to the Epic server when documents are updated. Configure an Export Destination for the Epic server using the server's IP address or hostname.

Message Templates

HL7 Message Templates must be configured for OnBase to correctly interpret and generate HL7 messages.

The following items are required for OnBase to communicate with the Epic server using HL7:

- The Date & Time data type must be used for OnBase Keyword Types configured for dates, such as Admit Date, Discharge Date, and Date of Birth.
- The OnBase chart number Keyword Type must be mapped to the PV1.19.1 HL7 field (Visit Number ID).
- Depending on your Epic configuration, the ZDF.2.13 field (Provider ID Type) may require a value. This value is configured on the **HL7** tab under **Medical | Medical System Settings**. See HL7 Settings on page 213 for more information.
- OnBase communicates document deficiency statuses to Epic at the API level. OnBase can be configured to also communicate these statuses to Epic using HL7 and the MDM message type. If HL7 is used, then the MDM message template must have default values for specific fields in the TXA and OBX segments. Either MDM^T10 or MDM^T02 message types can communicate the document deficiency status to the Epic server. MDM^T10 is the more appropriate message type for the event.

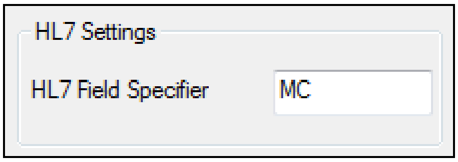
The following table lists the HL7 fields that require default values. Where applicable, the table provides the predefined default values available in OnBase. For the remaining fields, provide the value appropriate for your Epic environment.

Segment	Field ID	Field Name	Default Value
TXA	2	Document Type	This value will vary per Epic environment. Contact your Epic administrator.
	4	Activity Date/Time	**$$DOCTIMESTAMP**
	5	Primary Activity Provider Cod/Nam	This value will vary per Epic environment. Contact your Epic administrator.
	12.3	Unique Doc Num: universal ID	**$$DOCNUMBER**
	17	Document Completion Status	This value will vary per Epic environment. Contact your Epic administrator.
	19	Document Availability Status	This value will vary per Epic environment. Contact your Epic administrator.
OBX	2	Value Type	This value will vary per Epic environment. Contact your Epic administrator.
	5.1	Observation Value: Pointer	**$$DOCNUMBER**

Note: For information on configuring default values, see the **HL7 Module** documentation.

HL7 Field Specifiers

In OnBase, some medical components require the configuration of an **HL7 Field Specifier**. This configuration field allows you to define the expected HL7 code for the component.



For example, suppose HL7 messages identify the Main Campus facility by providing the code **MC** in the HL7 facility field. When the Main Campus facility is configured in OnBase Configuration, it should have an **HL7 Field Specifier** of **MC**.

Requirements for HL7 Field Specifiers

To be configured properly, HL7 field specifiers must meet the following requirements.

1. The value in the **HL7 Field Specifier** field must match the HL7 code in the HL7 message.
2. The expected location of the HL7 code must be configured one of two ways:
   - Using a chart field override on HL7 message templates
   - Using Chart Data Field Configuration
3. An HL7 field specifier must provided for any component that contains the **HL7 Field Specifier** field.

Handling Unknown HL7 Codes

If the HL7 Medical Records Chart action encounters HL7 code that does not match any configured items, it will automatically create a new item for the HL7 code.

For example, suppose an HL7 message has the value **MC** in the facility field, but MC is not associated with any facilities in OnBase. In this case, the Medical Records Chart action will do the following:

- Create a new facility named **MC**
- Place the value **MC** in the facility's **HL7 Field Specifier** field
- Assign the specified chart to the **MC** facility

Facilities and Admit Types created by HL7 are regarded as not configured. In the Medical Records Management Solution, if a chart is assigned a facility or Admit Type that has not been configured, the chart is sent to Charts Requiring Review. Once the facility or Admit Type is configured in OnBase Configuration, the chart can be removed from Charts Requiring Review. The chart will respect the newly configured settings.

User & User Group Configuration

The following topics describe how to configure User Groups for Signature Deficiencies for Epic. See the Configuration module help files for detailed information regarding User Name/Password and User Groups/Rights configuration.

User Creation

User accounts are created for Epic users automatically and seamlessly.

The first time an Epic user accesses an OnBase document through Epic, the Epic user account is created in OnBase and automatically added to the **ALL EPIC USERS** User Group. You will configure this User Group in the next section.

The Epic security model governs which documents users can view within Epic and how they can work with those documents. If a user requires access to the OnBase Client, then this user account must be manually added to additional OnBase User Groups with appropriate rights and privileges.

User Group Configuration

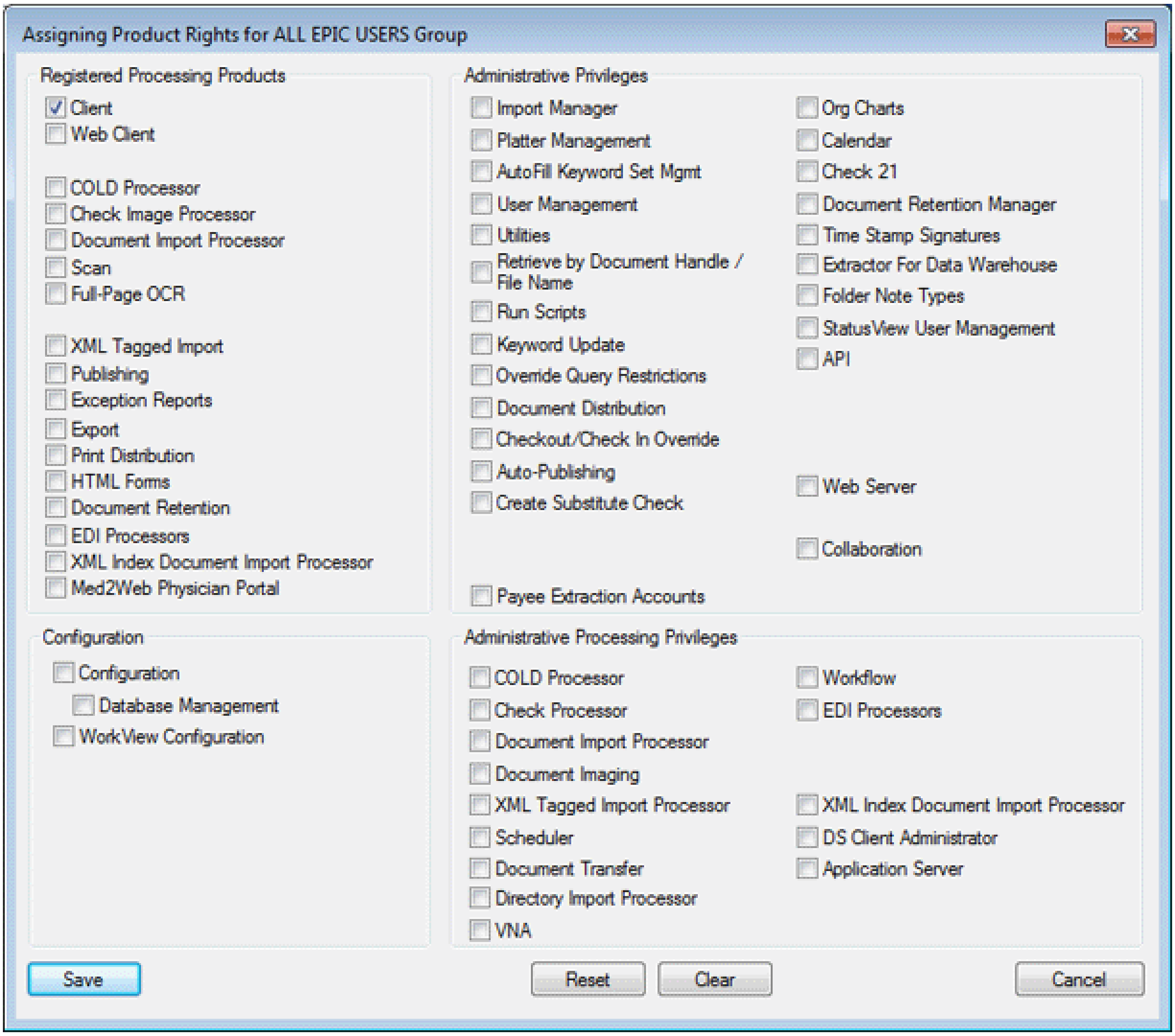
Signature Deficiencies for Epic requires a User Group named **ALL EPIC USERS**. This User Group must have specific rights and privileges.

Note: Do not assign any Document Type Groups or Document Types to the **ALL EPIC USERS** group. This precaution ensures Epic users can view only OnBase documents that Epic grants them access to.

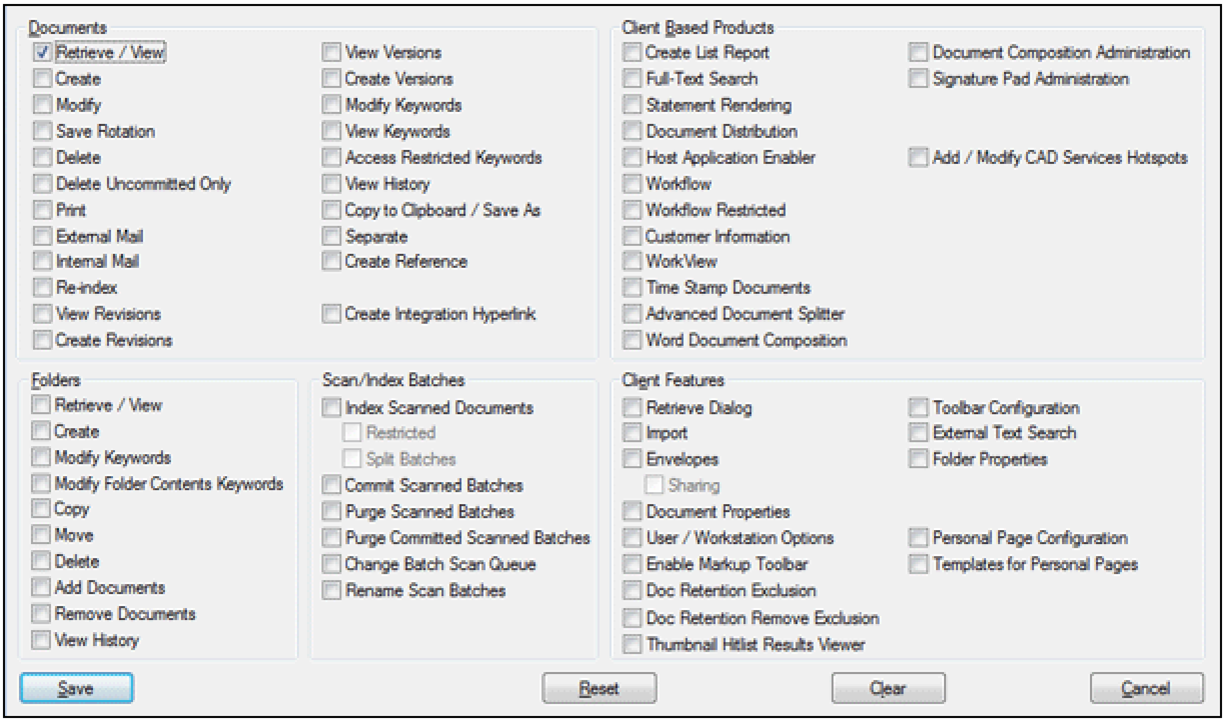
1. Create a User Group named **ALL EPIC USERS** in OnBase Configuration.

   Both analysts and physicians will be added to this User Group the first time they access OnBase through Epic.

2. Assign the **Client** product right to the **ALL EPIC USERS** group.



3. Assign the **Retrieve / View** privilege to the **ALL EPIC USERS** group.



Note: The Signature Deficiencies for Epic security model is controlled by Epic. Granting User Groups additional privileges does not guarantee access to the corresponding OnBase functionality from within Epic. Assigned privileges do apply if users access OnBase outside of Epic.

4. The following OnBase features are configurable for use within Signature Deficiencies for Epic. These features can be configured for **ALL EPIC USERS**. Alternatively, users from **ALL EPIC USERS** can be selectively added to another User Group with the appropriate privileges for these features.
   - **Note Types:** Configure the note types that an Epic user can view, create, modify or delete.
   - **Workflow Queues:** Configure the Workflow queues and life cycles that can be referenced (but not activated) when a user is viewing a document.
   - **Password Options**—Depending on the password policy in effect, Epic users may be locked out if their accounts have been idle too long. Make sure password policies and account lockout settings are configured appropriately for Epic users.

Note: The **Send To** options are not available in the document viewer, even if the user has sufficient privileges. These options have been disabled to help maintain the privacy of sensitive patient information.

5. Assign the necessary medical records privileges as described in the next topic.

Medical Records Privileges

To assign deficiencies, analysts require the **Analysis** medical records privilege. To work on deficiencies, physicians require the **Completion** medical records privilege. For a suggested approach, see Recommended User Group Setup on page 132.

1. In OnBase Configuration, select **Users | User Groups/Rights**.
2. Select a User Group (for example, ALL EPIC USERS).
3. Click **Medical Rec Privileges**. The **Medical Records Privileges** dialog box is displayed.
4. Select the medical records privileges appropriate for the selected User Group. Each privilege is described under Medical Records Privileges Descriptions on page 130.
5. Click **OK** when finished.

Medical Records Privileges Descriptions

OnBase provides several privileges for medical records users. The following table describes only the privileges that apply to Signature Deficiencies for Epic. The **Dialog Tab** column indicates where each privilege is located in the **Medical Records Privileges** dialog box.

Privilege	Dialog Tab	Description
Analysis	Chart	Allows analysts to create, edit, and delete deficiencies. Analysts also require sufficient privileges to the medical record Note Types. For more information, see Medical Note Type Privileges on page 131.
Completion	Chart	Allows physicians to accept deficiencies (sign documents) or decline deficiencies.
Chart Search	Chart	Provides access to Chart Search in the OnBase Client, the Medical Records Unity Client, and the Patient Window. This privilege does not affect the Analysis or Signing interfaces. For more information, see the **Medical Records Unity Client** or **Patient Window** module reference guide.
Administration	Administration	Provides access to the following **Medical** menu options in the OnBase Client: Charts Requiring Review, Create Chart Document Report, and Process Chartless Documents.
Chartless Document Assignment	Administration	Allows users to assign documents that were not automatically assigned to a chart (chartless documents) to the correct chart. This functionality is available in the OnBase Client. **Note:** Users must have the **Delete** document privilege in order to use the **Remove Document** feature from Assign Chartless Documents in the OnBase Client.

Privilege	Dialog Tab	Description
Physician Importer	Administration	Allows users to configure and run a physician import process, which creates physicians in OnBase. This privilege enables the **Processing | Physician Importer** option in the Client.
Burning	Administration	Allows users to review and address deficiency burning errors using the Burning Admin layout in the Medical Records Unity Client.

Medical Note Type Privileges

The following tables outlines the minimum Note Type privileges analysts and physicians require to assign and work on deficiencies. For a suggested approach to assigning Note Type privileges, see Recommended User Group Setup on page 132.

Medical Record Note Type	Physician Privileges	Analyst Privileges
MedRec-Approved Missing Information	• Create, View	• Create, View, Modify, Delete
MedRec-Approved Signature	• Create, View	• Create, View, Modify, Delete
MedRec-Not Approved Signature	• View	• Create, View, Modify, Delete
MedRec-Not Approved Missing Information	• View	• Create, View, Modify, Delete

Note: The **Modify** privilege allows users to reposition deficiencies on documents. Assign the **Modify** Note Type privilege only to users who should be permitted to move deficiencies.

Recommended User Group Setup

For ease of maintenance, assign privileges required by analysts and physicians to the ALL EPIC USERS User Group, as outlined in the following table. Epic controls who has access to analysis and completion activities. Granting both Analysis and Completion privileges to ALL EPIC USERS will not cause privilege conflicts within Epic.

Configuration Category	ALL EPIC USERS Privileges
Product Rights	Client
Privileges	Retrieve / View
Medical Rec Privileges	Both: • Analysis • Completion
Note Types: MedRec-Not Approved Signature MedRec-Approved Signature MedRec-Not Approved Missing Information MedRec-Approved Missing Information	Create, View, Modify, Delete

Note: This approach assumes physicians should be permitted to permanently reposition deficiency notes on documents. If only analysts should be able to move deficiency notes, see Variation of Recommended Setup on page 132.

Variation of Recommended Setup

If physicians should be prohibited from permanently repositioning deficiency notes on documents, then you must create an additional User Group for analysts. With this approach, both analysts and physicians will be automatically added to the ALL EPIC USERS User Group, but analysts must be manually added to a separate ALL EPIC ANALYSTS User Group.

The following table outlines the medical record privileges and medical Note Type privileges for each User Group:

Configuration Category	ALL EPIC USERS Privileges	ALL EPIC ANALYSTS Privileges
Product Rights	Client	Client
Privileges	Retrieve / View	Retrieve / View
Medical Rec Privileges	Completion	Analysis

Configuration Category	ALL EPIC USERS Privileges	ALL EPIC ANALYSTS Privileges
Note Types: MedRec-Approved Missing Information MedRec-Approved Signature	Create, View	Create, View, Modify, Delete
Note Types: MedRec-Not Approved Signature MedRec-Not Approved Missing Information	View	Create, View, Modify, Delete

Authentication Configuration

OnBase allows you to modify the external ID and password values expected from Epic. This feature provides an alternative to the default values used by the integration. To obtain the default values for the Integration for Epic, please contact a Technical Support Representative.

See the following topics:

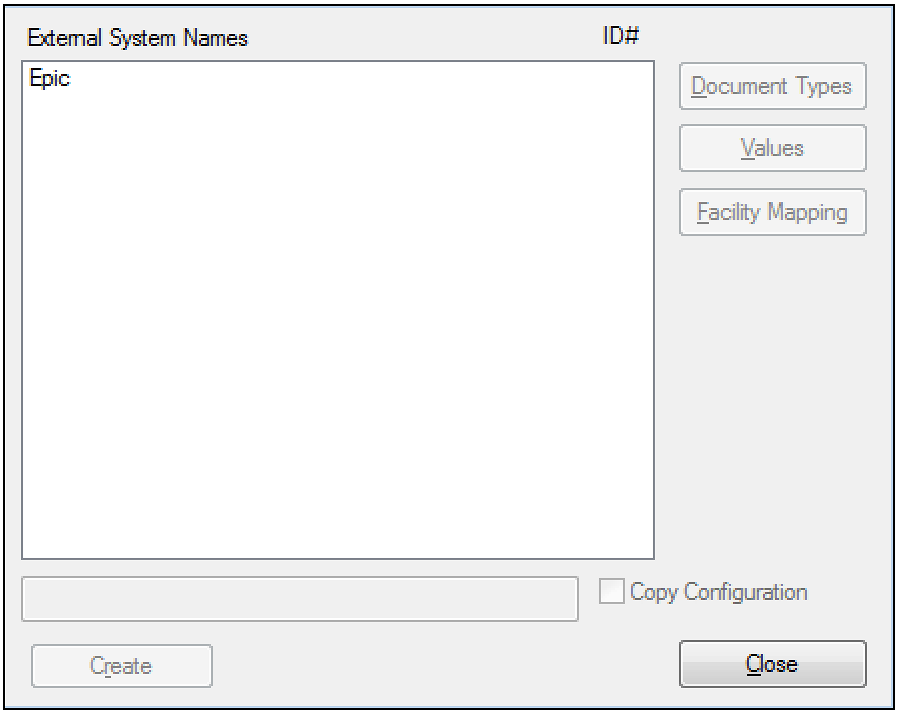
- Configuring the User Name and Password on page 134
- Configuring Initialization Vectors for URL Integrations on page 136
- Changing Existing Values on page 139
- Changing Existing Key Names on page 140

Configuring the User Name and Password

Complete these steps to change the external ID and password OnBase expects from Epic. If these settings are not configured, the default external ID and password are used.

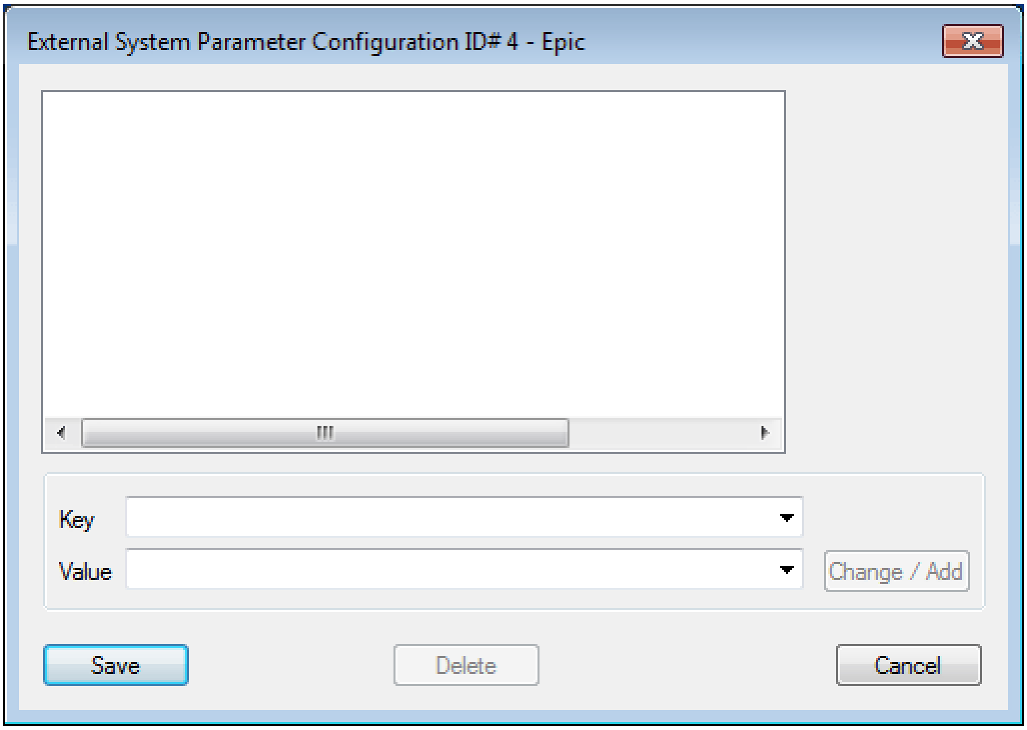
To configure the external ID and password:

1. In the OnBase Configuration module, select **Utils | External Systems**. The **External System Configuration** dialog box is displayed.



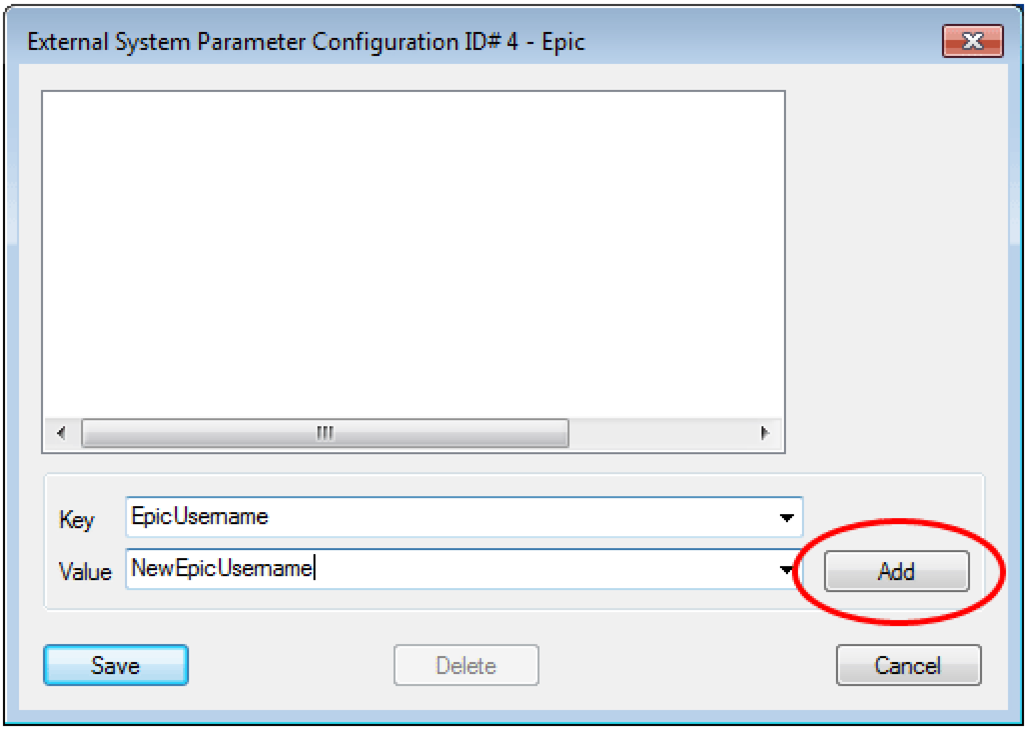
2. Select **Epic** from the list.

3. Click **Values**. The **External System Parameter Configuration** dialog box is displayed.



4. In the **Key** field, type **EpicUsername**. This key is case-sensitive. Ensure the **E** and **U** are capitalized.
5. In the **Value** field, type the new value to use as the external Epic ID.

6. Click **Add**. The new settings are added.



7. In the **Key** field, type **EpicPassword**. This key is case-sensitive. Ensure the **E** and **P** are capitalized.
8. In the **Value** field, type the new value to use as the external Epic password.
9. Click **Add**. The new settings are added.
10. Click **Save** to save the settings.

Note: If you click **Save** without first clicking **Add**, the specified **Key** and **Value** are automatically added.

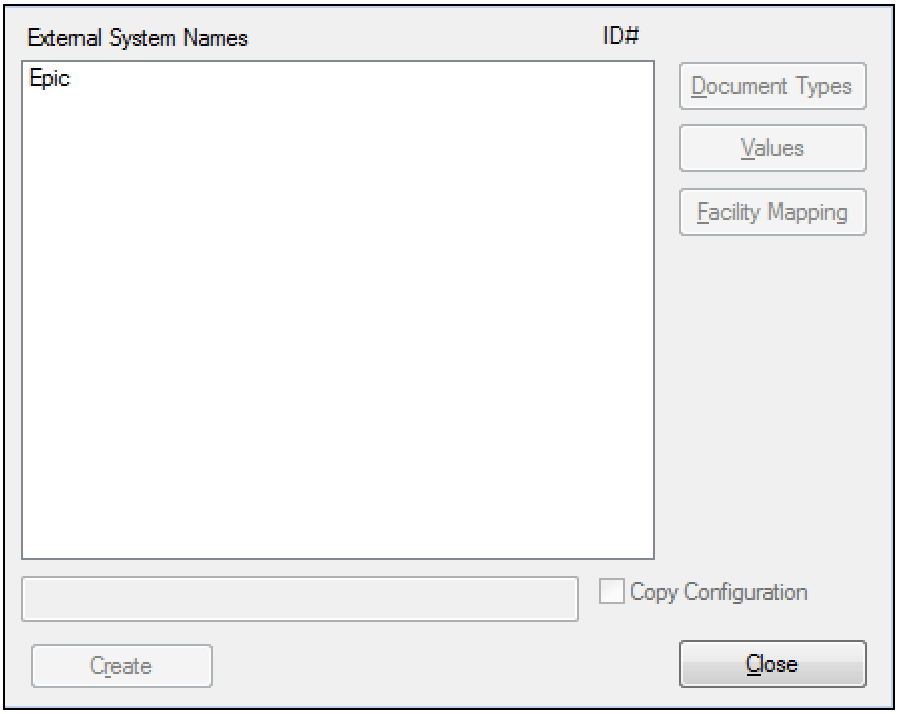
11. Update Epic to use the new external ID or password. Contact your solution provider for Epic configuration requirements.

Configuring Initialization Vectors for URL Integrations

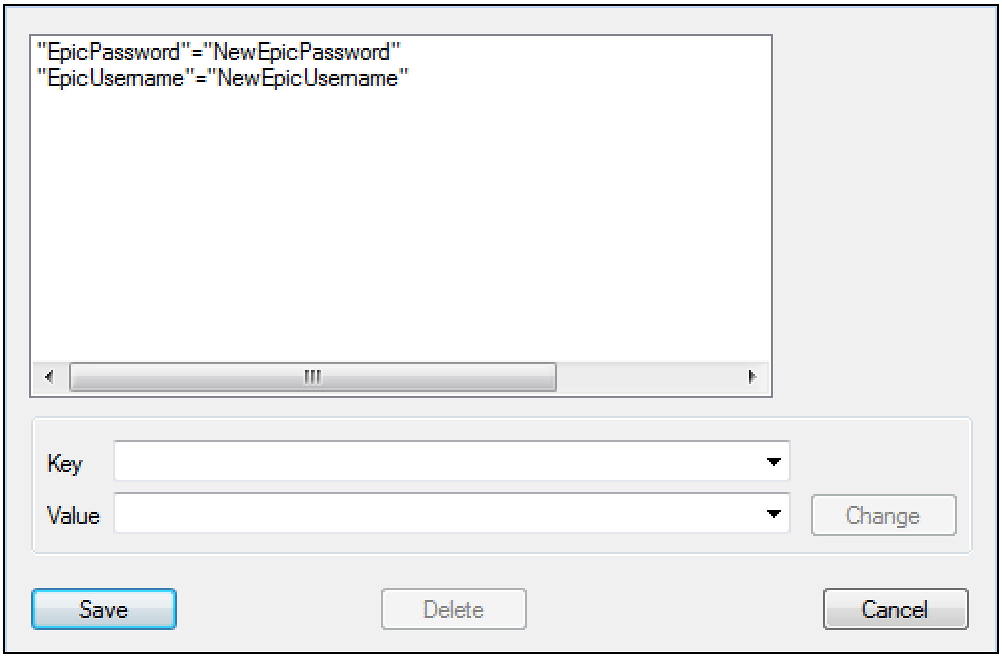
An initialization vector (IV) adds a layer of cryptographic security to encrypted information sent in URL query strings. Possible applications include (but are not limited to) DocPop and the OnBase Patient Window. It is highly recommended that this setting is configured if you have any OnBase applications that will receive Epic authentication information through a URL query string.

To configure initialization vectors for URL integrations:

1. In the OnBase Configuration module, select **Utils | External Systems**. The **External System Configuration** dialog box is displayed.



2. Select **Epic** and click **Values**. The **External System Parameter Configuration** dialog box is displayed.



3. In the **Key** field, type the following: **Epic Encryption Initialization Vector Required**

Note: Key names are case sensitive. Type the name exactly as displayed.

4. In the **Value** field, enter one of the following values:

Value	Description
True	Accepts only encrypted information that contains an initialization vector. For security purposes, it is highly recommended that this setting be configured to **true**.
False	Accepts encrypted information with or without an initialization vector.

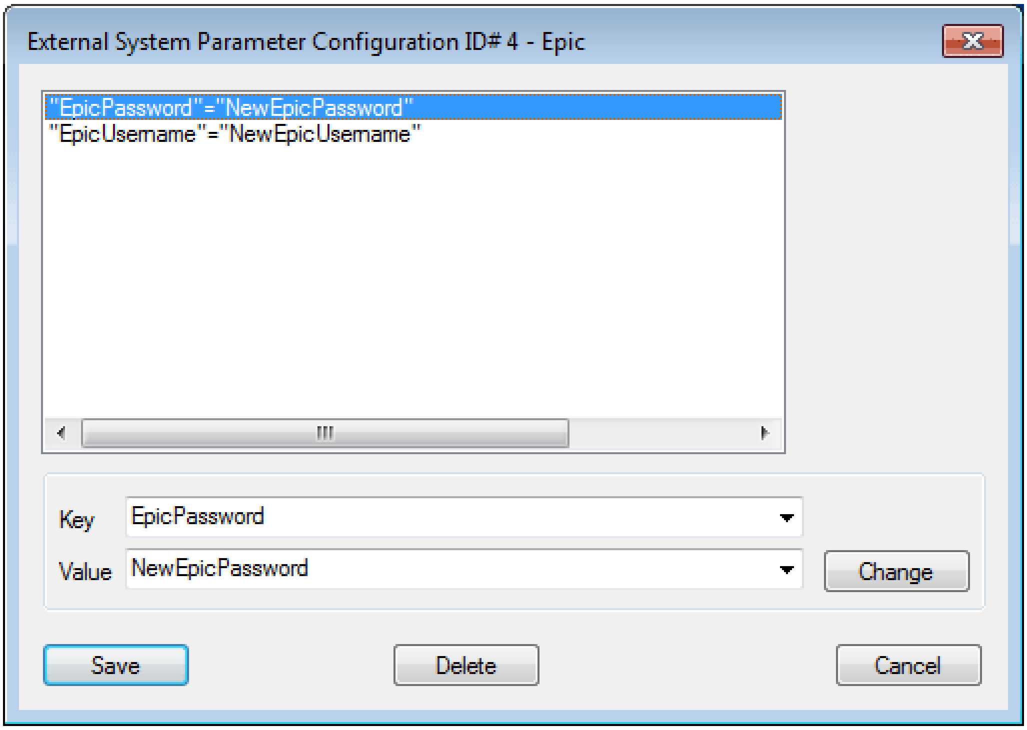
5. Click **Add**.
6. Click **Save**.

Note: If you click **Save** without first clicking **Add**, the specified **Key** and **Value** are automatically added.

Changing Existing Values

To change an existing value in the **External System Parameter Configuration** dialog box:

1. Select the setting whose value you want to change.



2. In the **Value** field, type the new value for the selected key.
3. Click **Change**.
4. Click **Save** to save the change. To cancel the change, click **Cancel**.

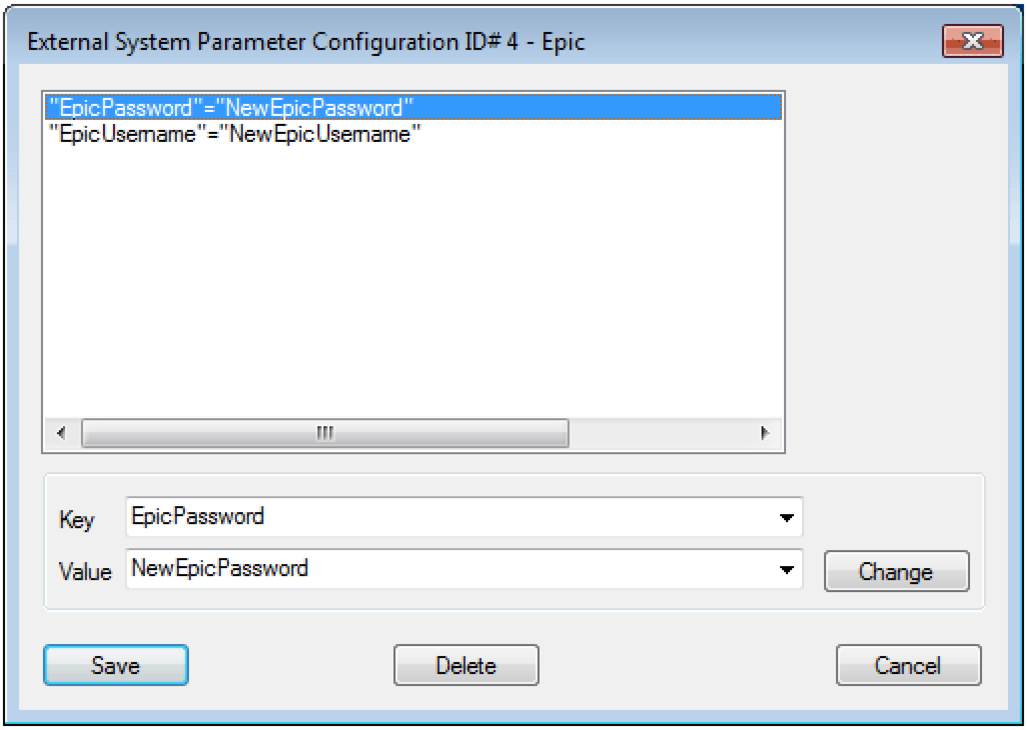
Note: If you click **Save** without first clicking **Change**, then your changes are saved automatically.

5. Update Epic to use the new external ID or password. Contact your solution provider for Epic configuration requirements.

Changing Existing Key Names

To change the name of an existing key in the **External System Parameter Configuration** dialog box:

1. Select the key whose name you want to change.



2. Click **Delete**.
3. In the **Key** field, type the correct name for the key.
   - For the external ID, type **EpicUsername**. This key is case-sensitive. Ensure the **E** and **U** are capitalized.
   - For the password, type **EpicPassword**. This key is also case-sensitive. Ensure the **E** and **P** are capitalized.
4. In the **Value** field, type the appropriate value.
5. Click **Add**.
6. Click **Save** to save the change.

Note: If you click **Save** without first clicking **Add**, the specified **Key** and **Value** are automatically added.

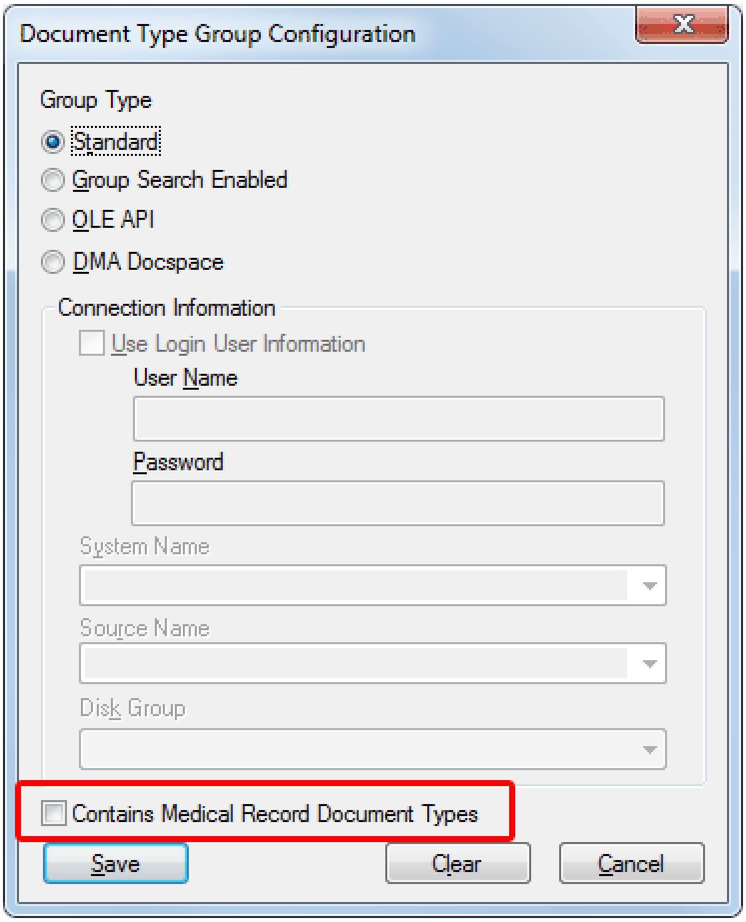
Document Type Configuration for Signature Deficiencies

For information about configuring Document Types for Signature Deficiencies for Epic, see the following topics:

- Document Type Group Assignment on page 142
- Configuring a Medical Record Document Type on page 142
- Characters Per Line on page 143
- Revisions & Medical Record Document Types on page 143
- Chart Data Fields on page 143
- DICOM Studies on page 144

Document Type Group Assignment

Ensure all Document Types that may contain deficiencies belong to a Document Type Group that has **Contains Medical Record Document Types** selected in Document Type Group configuration.



Caution: This setting is irreversible. Ensure you want to treat all documents and Document Types in this group as medical records before applying this option.

Note: Document Types belonging to a medical record Document Type Group cannot be deleted from OnBase, even if the -ROMANZO switch is applied.

Configuring a Medical Record Document Type

Deficiencies can be assigned only to documents that are attached to charts. For information about configuring Document Types for charts, see the **HL7** module reference guide.

Also see the **HL7** module reference guide for information on indexing medical documents using chart-based AutoFill Keyword Sets and MPI lookup.

Characters Per Line

Ensure the **View / Print Options** for chart Document Types are sufficient to accommodate printed signatures.

For each Document Type, the **Characters Per Line** setting controls the width of the page displayed in the viewer. Adjusting this value may affect whether deficiencies will fit on the printed page. The actual number of columns allowed per page also depends on font size and the usage of server print queues.

For more information about configuring **View / Print Options**, see the **System Administration** documentation.

Revisions & Medical Record Document Types

Because the final iteration of the document is the legal representation of the medical record (and includes all signatures and added information), it should be the only revision available to users who need to access the document after it is completed.

For this reason, Document Type Rendition/Revision settings for all Document Types belonging to a medical record Document Type Group must be **Non Revisable**.

When all deficiencies on a document are complete, deficiencies and notes are burned permanently onto the document. When this happens, even though the medical record Document Types are non-revisable, a new rendition and/or revision is created for the document.

- An image document will have a new revision added.
- A text document will have an image file format rendition created as a new revision.
- Notes/deficiencies/annotations that are on previous revisions of the document and are not setup to be on all revisions will be deleted.

If administrators (users explicitly given the medical record privilege of **Administration**) need to investigate the document's revision history, they can access previous revisions by right-clicking on an open document and selecting **Revisions/Renditions**.

Chart Data Fields

Ensure Keyword Types assigned to Document Types are also assigned to Chart Data Fields. OnBase uses these mappings to match documents to the appropriate OnBase charts. For more information, see Chart Data Field Configuration on page 198.

DICOM Studies

The Signature Deficiencies for Epic viewer does not support DICOM file formats. If a Document Type has a default file format of **DICOM Study**, no documents from that Document Type will be displayed in the Signature Deficiencies for Epic Analysis or Signing window.

Note: If you need to change the default file format of an existing Document Type to **DICOM Study**, first verify there are no outstanding deficiencies on documents in the Document Type. Once the default file format is changed to **DICOM Study**, the documents will not be accessible through Signature Deficiencies for Epic.

Excluding Medical Documents from Charts

In most cases, all documents in Document Types belonging to chart Document Types will either be automatically assigned to a chart upon import into the system, or they will be sent to Chartless Documents, where they must be manually assigned to a chart.

If some documents should not be assigned to a chart, you can use VBScripts to import a document into a chart Document Type without requiring the document to be assigned to a chart or placed in Chartless Documents.

The following procedures provide medical record-specific steps for VBScript configuration. For more information about configuring VBScripts, see the **System Administration** documentation.

Note: This functionality applies to chart attachment only. It will not prevent the attachment of medical documents to patient records.

Note: Depending on your Medical System Settings, OnBase may not attempt to add a document to a chart or send the document to Chartless Documents upon archival. Attachment can also be prevented at the process level for individual DIP processes.

Script Configuration for Excluding Documents From Charts

This topic describes the script command that allows a document to be imported into a chart Document Type without requiring a chart association.

This topic assumes that you are familiar with OnBase Script Automation. See the OnBase API Automation documentation for additional information regarding writing scripts for OnBase.

To create the script:

1. Write a VBScript in which the Execution Status property of the OnBase Application Object for the current document is as follows:

```
app.ExecutionStatus = -1
```

   If you set `ExecutionStatus()` to `0`, the document will be added to a chart or sent to Chartless Documents.

Note: A script hook of this type cannot modify the Keyword values on the document in the script because at the time the script runs, the document isn't actually stored in the database yet. Calling `StoreKeywords()` in the script will return an error and have no effect on the document.

2. Add the script to the VBScripts available for the system. See the VBScript configuration topic in the **System Administration** documentation.
3. Continue to the next procedure: Script Hook Configuration for Excluding Documents From Charts.

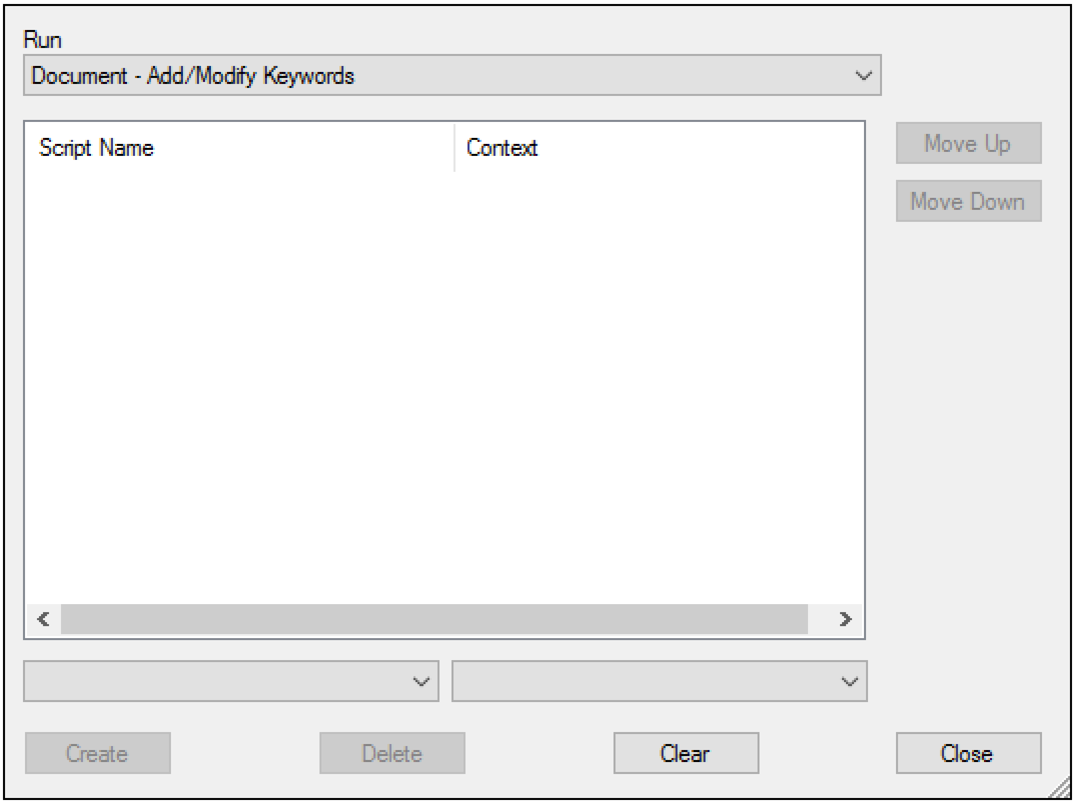
Script Hook Configuration for Excluding Documents From Charts

This topic describes how to configure a hook for a VBScript that allows a document to be imported into a chart Document Type without requiring a chart association.

Note: For detailed instructions regarding configuring script hooks, see the script hook configuration topic in the **System Administration** documentation.

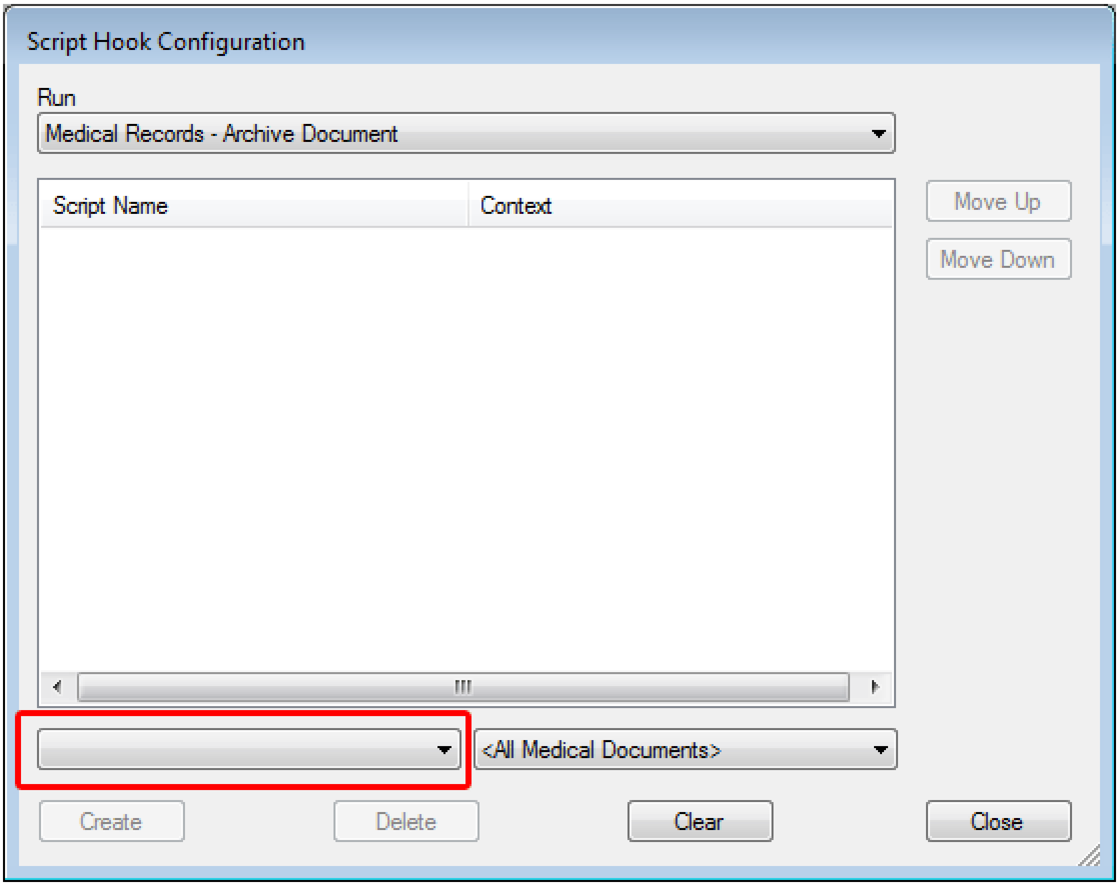
To configure the script hook:

1. From OnBase Configuration, select **Queries | Script Hooks**. The **Script Hook Configuration** dialog box is displayed.



2. From the **Run** drop-down list, select **Medical Records - Archive Document**.

3. From the drop-down in the lower-left corner, select the script you created in the previous procedure. The **Context** is provided as **<All Medical Documents>**.



4. Click **Create**.

Note Type Configuration

Signature Deficiencies for Epic uses both deficiency Note Types (for deficiency creation and resolution) and OnBase Note Types (for standard note functionality).

See the following topics:

- Available Deficiency Note Types on page 148
- Configuring Deficiency Note Types on page 149
- Configuring Burn Settings for Standard OnBase Note Types on page 150

Available Deficiency Note Types

Deficiencies are based on deficiency Note Types, whose names begin with **MedRec**. Unlike standard OnBase Notes Types, these Note Types have specific configuration settings to ensure they are properly displayed and burned on charts. Because these settings should not be modified, most attributes on deficiency Note Types are not configurable.

Tip: The **MedRec-** prefix distinguishes deficiency Note Types from other OnBase Note Types. Rename deficiency Note Types by double-clicking on the name of the Note Type (not by changing the Auto-Name). For example, you could change **MedRec-Not Approved Signature** to **Missing Signature**.

Available deficiency Note Types are described in the following table:

Deficiency Note Type	Note Type #	Description
MedRec-Not Approved Signature	20	Used when an analyst applies a Missing Signature deficiency
MedRec-Approved Signature	25	Used when a physician signs a Missing Signature deficiency
MedRec-Not Approved Missing Information	33	Used when an analyst applies a Missing Information deficiency
MedRec-Approved Missing Information	34	Used when a physician signs a Missing Information deficiency
Other MedRec Note Types	30-32, 37-40	Reserved for other OnBase modules

Configuring Deficiency Note Types

The following are guidelines for assigning Note Type privileges, icons, and print settings. For detailed information on configuring Note Types, including User Group Note Type privileges, see the Configuration module help.

Note: Medical Records notes (deficiencies) are displayed on all revisions of a document.

1. Assign an icon to each **MedRec** Note Type. Each Note Type used to create or complete deficiencies must be assigned an icon.
2. Assign Note Type privileges to Signature Deficiencies for Epic users. Their **Create, View, Modify, Delete** privileges must be sufficient for users to perform their duties.

   See Medical Note Type Privileges on page 131.
3. For non-approved (or pending) deficiency Note Types, configure print settings. See Configuring Print Settings for Deficiency Note Types on page 149.

Configuring Print Settings for Deficiency Note Types

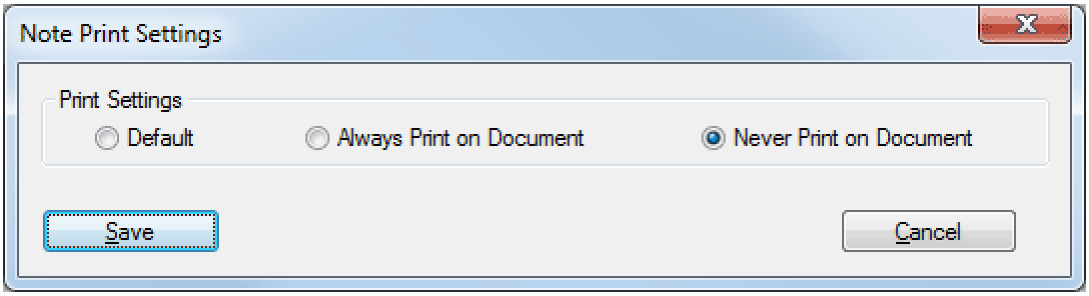
For deficiencies, printing varies depending on whether the deficiencies have been burned. A deficiency that has been burned onto a document is always printed.

If the deficiencies have not been burned, the following rules apply:

- Accepted or completed deficiencies always are printed on documents, except as noted below.
- If a document is printed using the HTML viewer in DocPop, Patient Window, or another Web application, deficiencies on the document are not printed.
- Incomplete or unresolved deficiencies may be printed depending on the print settings configured for their Deficiency Types.

To configure print settings for unresolved deficiencies:

1. Select **Document | Note Types** in OnBase Configuration.
2. Select a Note Type for non-approved (or pending) deficiencies.
3. Click **Attributes**. The **Note Print Settings** dialog box is displayed:



4. Select one of the following print settings.

Print Setting	Description
Default	Deficiencies of this Note Type are printed according to the note options selected when a user prints the document.
Always Print on Document	Deficiencies of this Note Type always are printed on documents.[a]
Never Print on Document	Deficiencies of this Note Type never are printed on documents.

a. Non-burned deficiencies and notes are not printed on documents when printing is initiated from the HTML viewer in DocPop, Patient Window, or other OnBase Web applications.

5. Click **Save**.

Configuring Burn Settings for Standard OnBase Note Types

After all of a document's deficiencies are signed and any declined deficiencies are resolved (e.g., they've been deleted or resubmitted and signed), the -EPICANALYSIS server identifies the document as ready for burning. For Note Types that are not used for deficiencies, you can configure notes to be burned onto the documents or deleted after the documents are burned.

See the following topics:

- Requirements for Burning Standard Notes on page 150
- Configuring Standard Note Types to Burn on Documents on page 151

Requirements for Burning Standard Notes

In order for standard Note Types to be burned onto documents, the following requirements must be met:

- The -EPICANALYSIS server must be running.
- The Note Type must be configured with the **Burn Note After Chart Processing** setting enabled.
- The document containing the note must have a file format of image or text.
- The document must contain at least one unburned deficiency.
- All deficiencies on the document must be completed.
- The document containing the note must be attached to a chart.
- The chart must have been created by an HL7 import process with the **Deficiency Analysis Application** set to **Signature Deficiencies for Epic**.
- If the document is revisable, the note must be displayed on the latest revision of the document at the time of burning. Notes on previous revisions are not burned.

Configuring Standard Note Types to Burn on Documents

Only notes that are configured for burning will be burned onto documents. Once these notes are burned, they are removed from the document.

To configure burn settings for standard Note Types:

1. In OnBase Configuration, select **Document | Note Types**.
2. Select the Note Type and click **Attributes**.
3. In the Medical Records section, select how notes of this Note Type should be treated when documents go through the burn process.
   - **Burn Note After Chart Processing**—See Burn Note After Chart Processing on page 151.
   - **Delete Note After Chart Processing**—See Delete Note After Chart Processing on page 151.
4. Click **Save**.

Burn Note After Chart Processing

Select to have all notes of this Note Type permanently burned onto the document during the burn process. This option is available only for Note Types configured as a **Note** or **Overlapped Text**. The option is unavailable for circles, arrows, and highlights, which are not eligible for burning.

When the -EPICANALYSIS server burns a document:

- Standard OnBase notes configured with the **Burn Note After Chart Processing** option are replaced with **See appended note #XXX**. Note text is printed onto the pages appended to the end of the document, and the notes are removed from the document.
- Overlapped text configured with the **Burn Note After Chart Processing** option is burned directly onto the document.

Delete Note After Chart Processing

Select to have all notes of this Note Type deleted from the document when completed deficiencies are burned onto the document. This option is automatically selected if **Burn Note After Chart Processing** is selected.

If a Note Type is configured to **Repeat on All Revisions**, then notes based on the Note Type are deleted from all revisions of the document during the burn process. If the Note Type is not configured to **Repeat on All Revisions**, then notes based on the Note Type are deleted from the latest revision only; notes on previous revisions are not deleted.

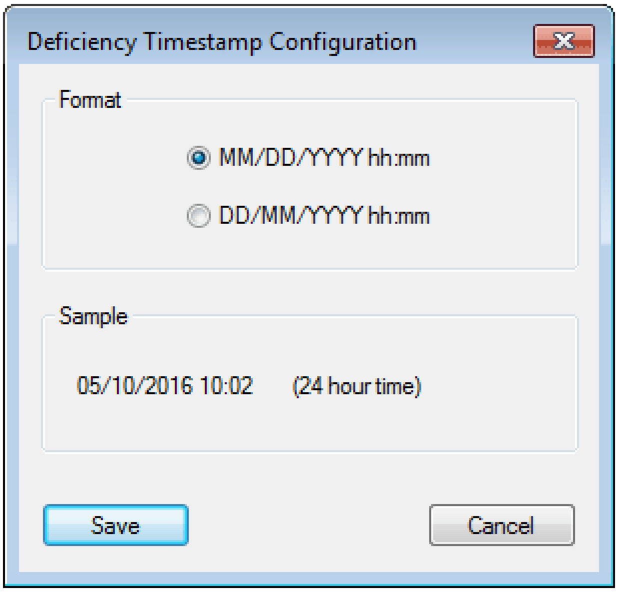
Deficiency Timestamp Configuration

You can configure the dates on deficiency timestamps to use the format **DD/MM/YYYY hh:mm** rather than **MM/DD/YYYY hh:mm**.

Note: This configuration affects only timestamps on deficiencies that are burned onto chart documents. It does not apply to date values shown elsewhere within OnBase.

Note: Deficiency timestamps use the date and time set on the server where the OnBase Application Server is installed.

1. In OnBase Configuration, select **Medical | Deficiency Configuration | Deficiency Timestamp Format**. The **Deficiency Timestamp Configuration** dialog box is displayed.



2. Select one of the following:
   - **MM/DD/YYYY hh:mm**
   - **DD/MM/YYYY hh:mm**

   The **Sample** section displays an example of the date and time in the selected format.
3. Click **Save**.

   The new format is applied to deficiencies burned after you save your change. You do not need to restart the -EPICANALYSIS server for deficiencies to be burned with the new format.

Time Zones

The OnBase Application Servers and the OnBase Client Medical Records Server must be set to the same time zone. Otherwise, burned signatures may display inconsistent time zones in their timestamps.

Depending on the Deficiency Type, burned signatures may display one of the following time zones:

- The time zone on the Application Server at the time the deficiency was accepted.
- The time zone on the OnBase Client Medical Records Server at the time the deficiency was burned.

To make sure time zones are consistent, set the Application Servers and the OnBase Client Medical Records Server to use the same time zone.

Medical Facility Configuration

Each chart must be associated with a facility. Facilities can be used to filter physicians and limit chart documents displayed within Signature Deficiencies for Epic. They can also be used to refine chart searches in other OnBase applications.

Facilities also control the appearance of tabs in the OnBase Client and the Medical Records Unity Client.

Note: If you are using both Signature Deficiencies for Epic and the Medical Records Management Solution, you can configure the Medical Records Unity Client to apply facility-based security to chart searches. If your system is configured this way, then charts must be associated with a configured facility in order for users with facility privileges to retrieve the charts using the Medical Records Unity Client.

The following procedures describe how to configure facilities and tabs:

- Facility Settings on page 155
- Configuring Chart Auto-Names on page 157
- Assigning Facility User Group Privileges on page 158
- Fixing Charts with Facility Issues on page 160
- Configuring Facilities to Automatically Complete Correction Tasks on page 162
- Clinical Document Tab Configuration on page 164

Filtering Physicians in Analysis

By default, the Analysis window lists all physicians available in OnBase. This can make deficiency assignment difficult in systems that contain a large number of physicians. To address this issue, Signature Deficiencies for Epic can filter the **Physician** list to display only physicians who practice at the current chart's facility.

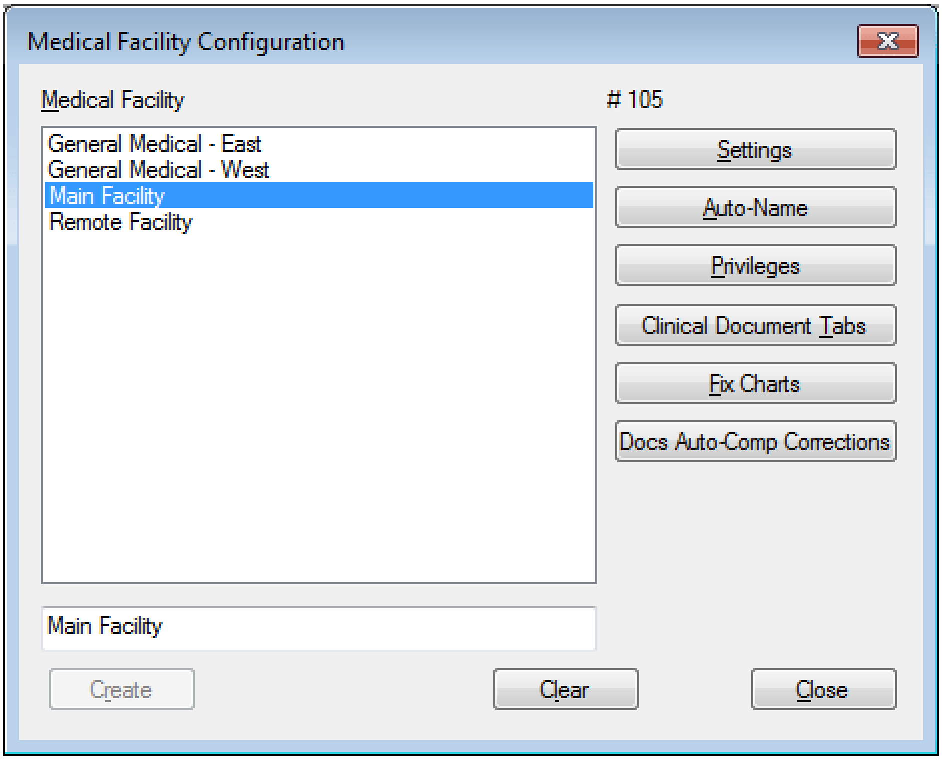
To use this feature, do the following:

1. Configure facilities in OnBase. Begin with Facility Settings on page 155.
2. Assign physicians to the facilities where they practice. See Assigning Facility User Group Privileges on page 158.
3. Add another setting to the Signature Deficiencies for Epic configuration file. See Filtering the Physician List by Facility on page 233.

Facility Settings

Follow these steps to create a facility and configure its settings.

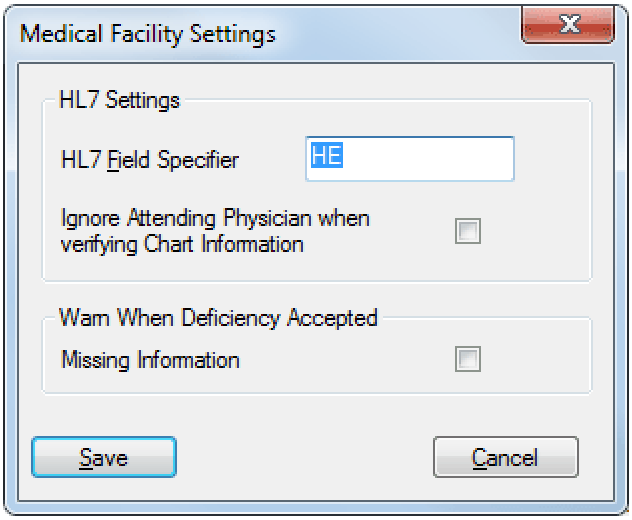
1. In OnBase Configuration, select **Medical | Facilities | Facility Configuration**. The **Medical Facility Configuration** dialog box is displayed.



Note: Facilities preceded with an asterisk (*) were created by HL7 and have not yet been configured. Before you began configuring the facility, you must restart the HL7 Listener to ensure that new charts won't be marked as requiring review. See Fixing Charts with Facility Issues on page 160 for more information.

2. In the field at the bottom, enter the name of the facility.
3. Click **Create**. The name is added to the list.

4. Click **Settings**. The **Medical Facility Settings** dialog box is displayed.



5. In the **HL7 Field Specifier** field, enter the HL7 **Medical Facility** value for this facility (required). For information about HL7 Field Specifiers, see HL7 Field Specifiers on page 126.

Note: The **Ignore Attending Physician when verifying Chart Information** setting does not apply to charts designated for Signature Deficiencies for Epic. In addition, the presence or absence of an attending physician does not affect whether these charts are sent to Charts Requiring Review.

6. Select the **Warn When Deficiency Accepted: Missing Information** setting to prompt physicians to confirm all necessary information has been provided whenever they click **Accept** for a Missing Information deficiency.

Note: Because most deficiencies are missing signatures, a physician could accidentally sign a Missing Information deficiency without supplying the requested information. Therefore, when enabled, this setting helps to avoid that scenario.

7. Continue to the following topics:

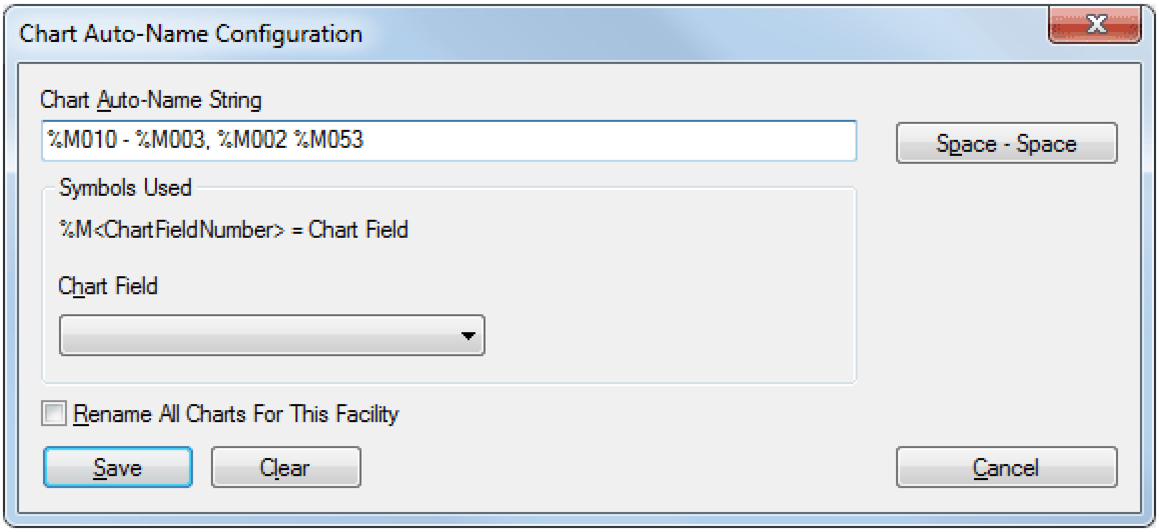
   - Configuring Chart Auto-Names on page 157
   - Assigning Facility User Group Privileges on page 158
   - Fixing Charts with Facility Issues on page 160
   - Clinical Document Tab Configuration on page 164

Configuring Chart Auto-Names

Complete the following steps to configure an **Auto-Name** string for all charts at this facility. The Auto-Name is the label users see when working with a patient's chart in modules like the OnBase Client or the Medical Records Unity Client.

Note: Chart Auto-Names cannot exceed 100 characters. If an auto-generated chart name contains more than 100 characters, the additional characters will be omitted.

1. Select a facility from the **Medical Facility Configuration** dialog box and click **Auto-Name**. The **Chart Auto-Name Configuration** dialog box is displayed.



2. In the **Chart Auto-Name String** field, enter the Auto-Name string. To enter variables for patient IDs and names, select them from the **Chart Field** drop-down list.
   - It is considered a best practice to use a combination of auto-generated values (available in the **Chart Field** drop-down list), along with typed text to provide a useful label.
   - An example of an Auto-Name string is **MRN=%M007 - %M003, %M002**, which would be displayed to users as **MRN=1111 - Doe, Jane**. In this example, everything preceded with a **%** sign was selected from the drop-down list and everything else was manually typed.
   - Click **Space-Space** to insert a space - dash - space in the string.
   - To rename all existing charts for this facility, select **Rename All Charts For this Facility**.
3. Click **Save**.

Assigning Facility User Group Privileges

You can configure Signature Deficiencies for Epic to limit the physicians available for assignment in Analysis. By default, the **Physician** list in Analysis includes all physicians available in OnBase, which may be cumbersome for analysts.

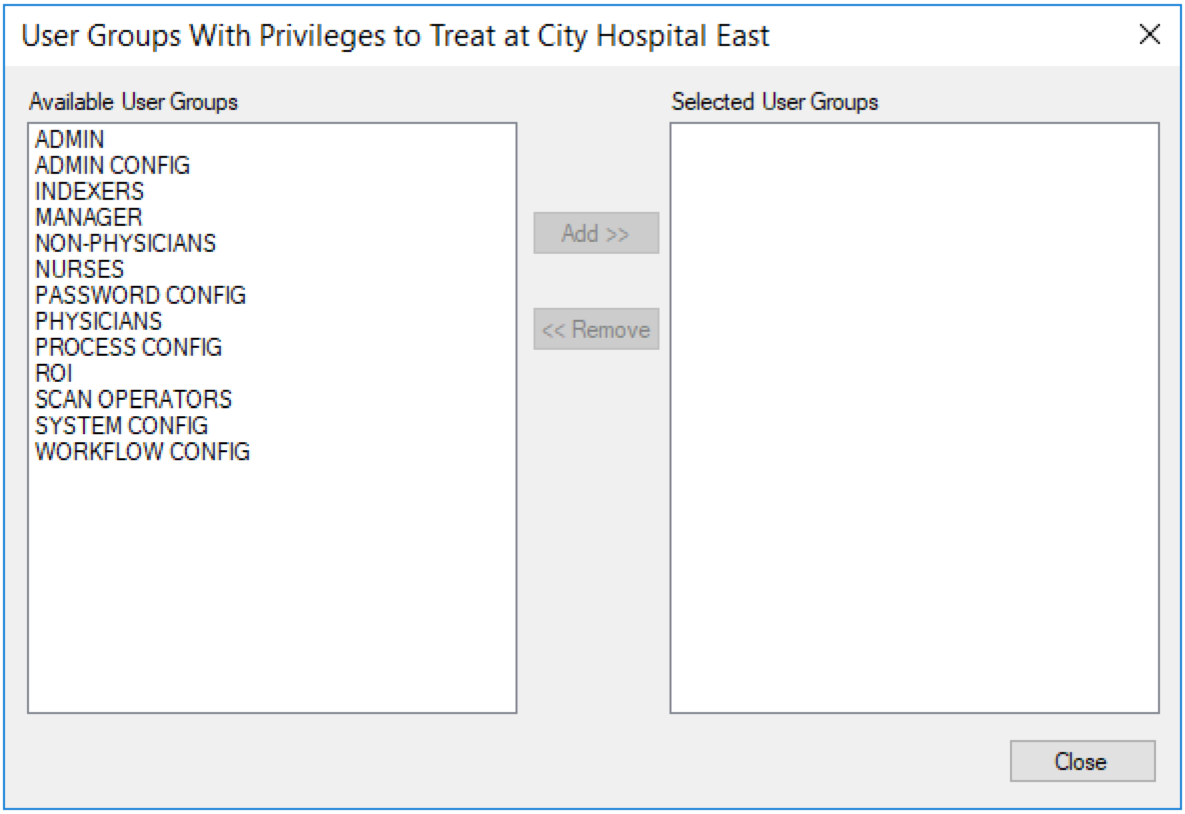
If necessary, you can configure Signature Deficiencies for Epic to filter the **Physician** list to display only physicians assigned to the current chart's facility. Ensure physicians are assigned privileges to their respective facilities, and set **filterPhysiciansByFacility** to **true** in the Signature Deficiencies for Epic configuration file.

In certain modules, including the OnBase Client and the Medical Records Unity Client, users with limited chart search privileges can retrieve charts only from facilities to which they have been explicitly assigned.

Note: If the **Apply Facility Based Security To Chart Search** setting is selected in Medical Client Settings, then users of the Medical Records Unity Client may be unable to retrieve charts designated for Signature Deficiencies for Epic unless those charts are associated with a known facility. Charts designated for Epic are not sent to Charts Requiring Review for missing or unknown facilities.

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**.

Fixing Charts with Facility Issues

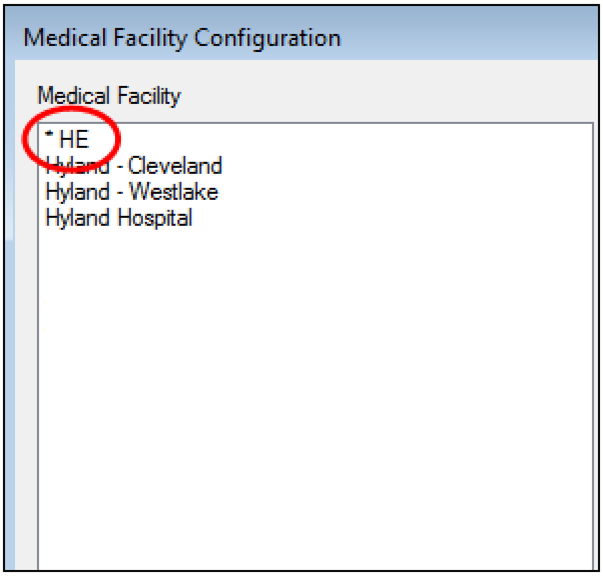
If an HL7 Medical Record Chart action processes a message containing a facility code that does not match a facility in OnBase, the action will create the facility in OnBase automatically. If any charts are created for the facility before it is fully configured, they will be sent to Charts Requiring Review. The following topics describe how to address this situation:

- Configuring the Facility
- Fixing Charts in Review for HL7-Created Facilities

Configuring the Facility

The following procedure describes how to complete the configuration of a facility created by the OnBase HL7 module. If the Charts Requiring Review queue contains any charts for the facility, the facility must be configured before the charts can be removed from the queue.

1. Select the facility that requires configuration. Facilities preceded with an asterisk (*) were created by HL7 and have not yet been configured.



2. Click **Settings**.
3. After modifying the facility's settings, click **Save**. The asterisk is removed.
4. Restart the OnBase Client process that is running the HL7 Listener or the HL7 EDI Processor. Once the HL7 process responsible for chart creation is restarted, new charts for the facility can be created without requiring review.
5. Proceed to Fixing Charts in Review for HL7-Created Facilities on page 161.

Fixing Charts in Review for HL7-Created Facilities

After you configure a facility that has been created by HL7, OnBase can reevaluate the charts that are in Charts Requiring Review because the facility was not configured.

If a chart is in Charts Requiring Review only because the facility was not configured, then the following procedure will remove the chart from the Charts Requiring Review queue. If a chart requires review for other reasons, then the chart remains in the Charts Requiring Review queue, where it must be manually removed.

1. Select the facility from the **Medical Facility Configuration** dialog box.
2. Click **Fix Charts**. This button is available only after the facility has been configured.

   OnBase displays a message indicating the number of charts that require review because the selected facility was created by HL7.
3. Click **OK**. If any charts require review because the selected facility was created by HL7, OnBase evaluates their review status.

   The time it takes to evaluate the charts depends on the number of charts requiring review. When the evaluation is complete, OnBase displays a message indicating whether all of the affected charts have been cleared from review.

Note: If any of the affected charts are still in Charts Requiring Review, then you must review and correct them manually. If any of these charts is associated with an Admit Type that was created by HL7, you may be able to fix them through Admit Type Configuration.

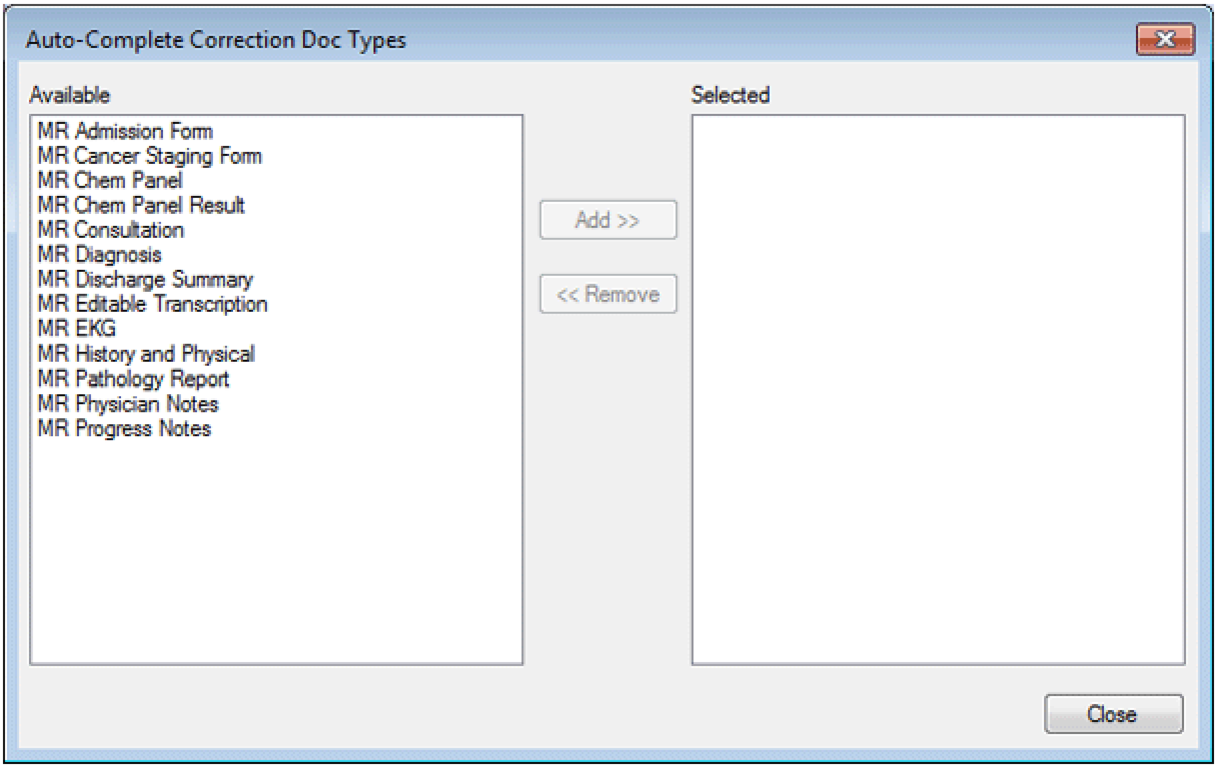
4. Click **OK** to return to the **Medical Facility Configuration** dialog box.

Configuring Facilities to Automatically Complete Correction Tasks

The Medical Records Unity Client allows users to create and complete chart correction tasks. The Add Document and Add Transcription task types, which are created for missing documents, can be automatically completed when the respective document is added to the chart. For each facility, you can specify the Document Types eligible to automatically complete these tasks.

Note: Correction tasks must satisfy certain criteria to be eligible for auto-completion. See Criteria for Automatic Correction Completion on page 163.

1. Select a facility from the **Medical Facility Configuration** dialog box.
2. Click **Docs Auto-Comp Corrections**. The **Auto-Complete Correction Doc Types** dialog box is displayed.



3. Select the Document Types that should be allowed to automatically complete Add Document and Add Transcription correction tasks.
4. Click **Add**.
5. Click **Close**. Repeat for each facility, as needed.

Criteria for Automatic Correction Completion

To be automatically completed, correction tasks must satisfy the following criteria:

1. The task type must be Add Document or Add Transcription.
2. The chart must contain only one pending Add Document or Add Transcription task associated with the missing document's Document Type.
   - If a chart has multiple pending Add Document or Add Transcription tasks associated with the same Document Type, these tasks must be manually completed in the Medical Records Unity Client.
   - If the chart has one pending Add Document task and one pending Add Transcription task associated with the same Document Type, then both tasks are completed when a document of that Document Type is added to the chart.
3. The task must have a status of **Pending**. Tasks currently in progress (assigned to a user) are not eligible for automatic completion.
4. The task must be associated with a Document Type. If a user creates an Add Document or Add Transcription task without selecting a Document Type, the task cannot be automatically completed.
5. The chart's facility must be configured to allow the associated Document Type to auto-complete tasks. Otherwise, the Add Document or Add Transcription correction task must be manually completed in the Medical Records Unity Client.

Clinical Document Tab Configuration

For Signature Deficiencies for Epic, you can configure Analyst Documents tabs to limit the documents displayed in the Analysis and Signing windows.

If any Document Types are assigned to an Analyst Documents tab, then the Analysis and Signing windows display only the documents assigned to these Document Types. Otherwise, all patient custom query and medical record documents associated with the chart are displayed.

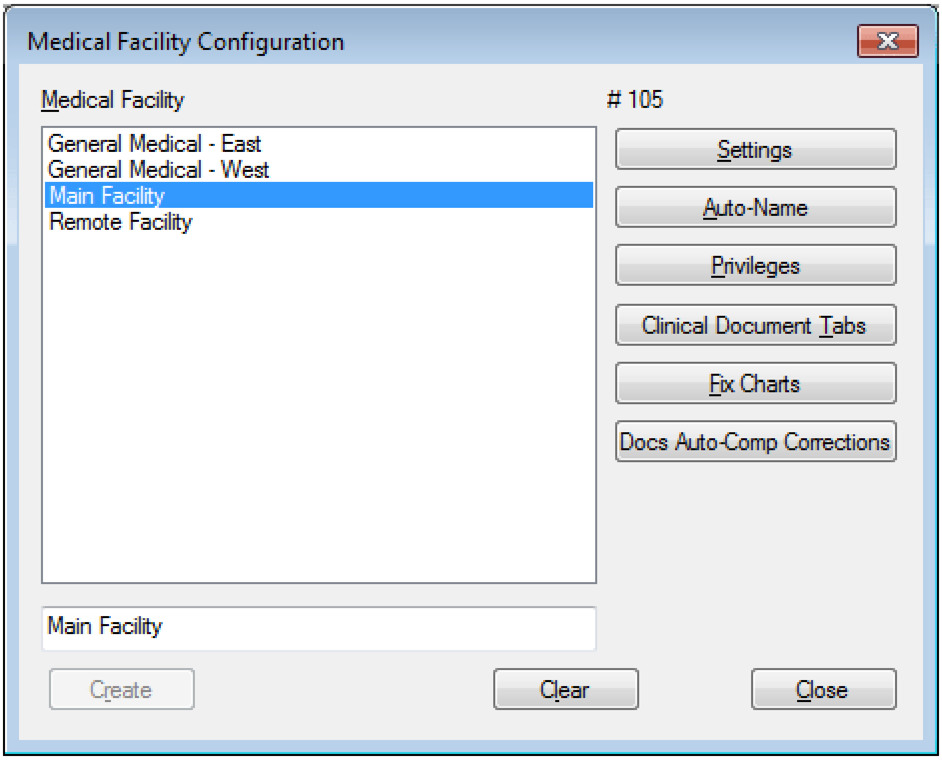
To configure an Analyst Documents tab, see the following topics:

- Creating a Tab for a Facility on page 164
- Assigning Document Types to Tabs on page 166
- Copying Tab Configuration to Other Facilities on page 167

Creating a Tab for a Facility

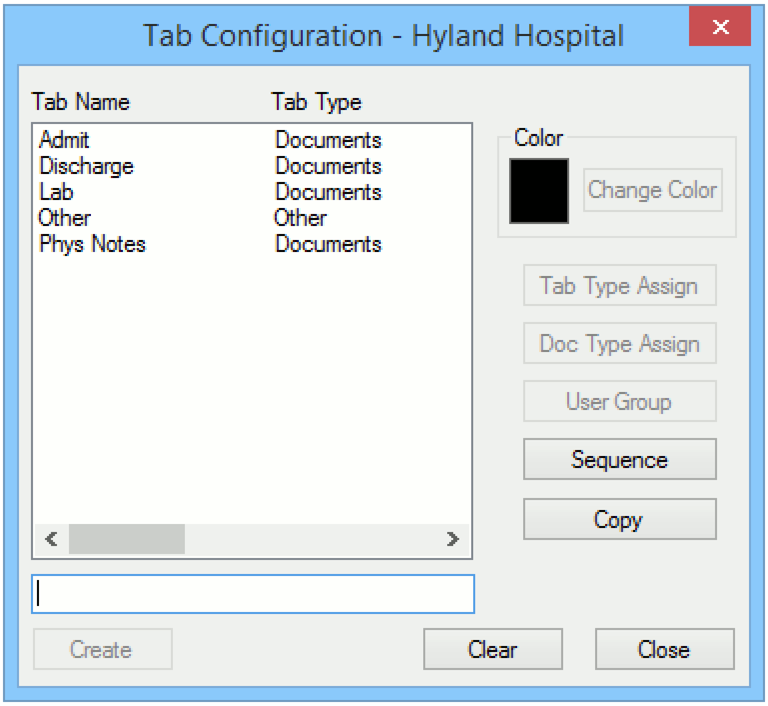
Complete the following steps to create a new Analyst Documents tab for a facility.

1. In OnBase Configuration, select **Medical | Facilities | Facility Configuration**.
2. Select a facility from the **Medical Facility Configuration** dialog box.

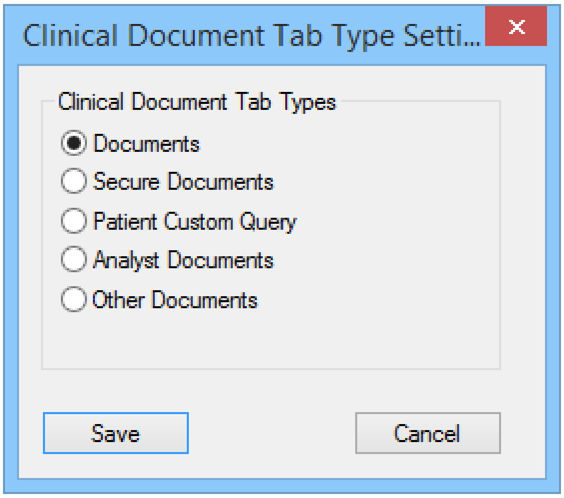


3. Click **Clinical Document Tabs**.
4. Type a name for a tab in the **Tab Configuration** dialog box. For example, a tab could be named Doctor Notes, Lab Results, or Discharge.

5. Click **Create**.



6. Click **Tab Type Assign**. The **Clinical Document Tab Type Settings** dialog box is displayed.

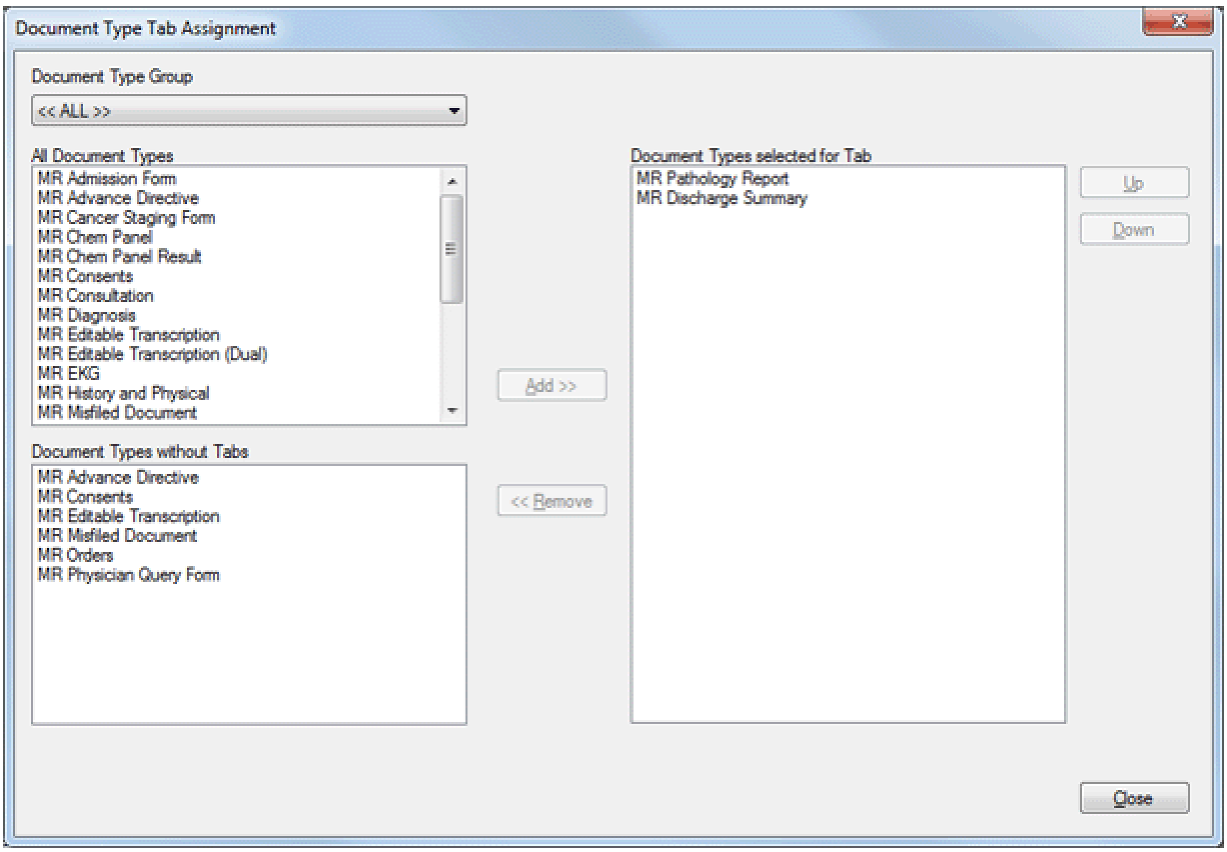


7. Select **Analyst Documents**.
8. Click **Save**.

Assigning Document Types to Tabs

If an Analyst Document tab should be used for filtering, it must be assigned at least one Document Type. If any Document Types are assigned to an Analyst Documents tab, then the Analysis and Signing windows display only the documents assigned to these Document Types.

1. Select the tab from the **Tab Configuration** dialog box.
2. Click **Doc Type Assign**. The **Document Type Tab Assignment** dialog box displays all Document Types residing in a medical record Document Type Group.



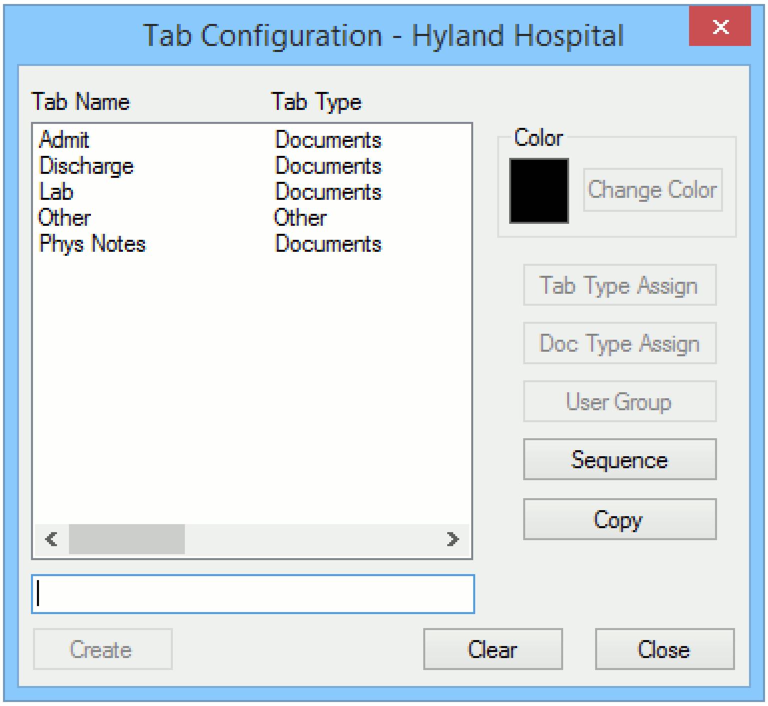
3. Select a **Document Type Group** to filter the lists of available Document Types.
4. Select one or more Document Types from one of the following panes:
   - **All Document Types**—Displays all Document Types in the selected Document Type Group.
   - **Document Types without Tabs**—Displays all Document Types not associated with a tab. (For tabs configured at the facility level, this list is specific to the current facility. For tabs configured at the cross-facility level, this list displays Document Types not assigned to a cross-facility tab.)
5. Click **Add**.
6. Repeat for all Document Types you want to be available from this tab.

7. Use the **Up** and **Down** buttons to change the default Document Type order for this tab.
8. Click **Close** when finished.

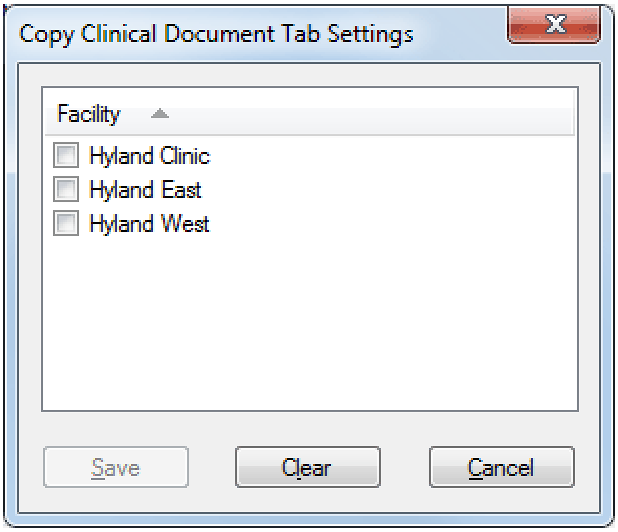
Copying Tab Configuration to Other Facilities

After a facility is configured, you can copy its tab configuration to other facilities in your system.

1. From the **Medical Facility Configuration** dialog box, select the facility whose tab configuration you want to copy to other facilities.
2. Click **Clinical Document Tabs** to display the **Tab Configuration** dialog box.



3. Click **Copy**. The **Copy Clinical Document Tab Settings** dialog box is displayed.



4. Select the facilities to copy tab configuration settings to.
5. Click **Save**.
6. Customize the tab configuration settings for each facility as needed.

Medical Records Custom Query Configuration

Solutions that include Patient Custom Query tabs also require the configuration of a medical records custom query. These tabs are populated using the medical records custom query, which retrieves all documents indexed with a unique patient identifier, such as the MPI.

The Analysis and Signing windows can display documents that are shared across all of a patient's charts. This sharing of documents ensures that patient records in each chart are consistent and up-to-date. For example, if a patient is issued a new insurance card, the card can be scanned into OnBase and indexed it with the patient's MPI. The custom query dynamically links the new card to the patient's existing charts that have the same MPI.

Note: Deficiencies cannot be placed on documents that are not attached to a chart.

See the following topics:

- Patient Window Custom Query Requirements on page 169
- Configuring a Custom Query for Medical Records on page 169
- Designating the Medical Records Custom Query on page 171

Patient Window Custom Query Requirements

You cannot create Patient Custom Query tabs to be used in the OnBase Patient Window. If a Patient Custom Query tab was configured at the cross-facility level in an earlier version of OnBase, it is recommended to reconfigure the tab using the **Documents** tab type.

If the Patient Window must use a previously configured Patient Custom Query tab, make sure the medical records custom query meets the following requirements:

Note: These requirements apply to the Patient Window only. They do not apply to the Medical Records Unity Client.

- The custom query must not contain Document Types belonging to a medical record Document Type Group.
- The retrieval keywords for the custom query must include the Keyword Type mapped to the MPI chart data field.

Configuring a Custom Query for Medical Records

The following procedure provides only the steps required to configure a custom query for associating non-medical record documents to charts. For information about custom queries, see the Queries and VB Scripts topic in the **System Administration** documentation.

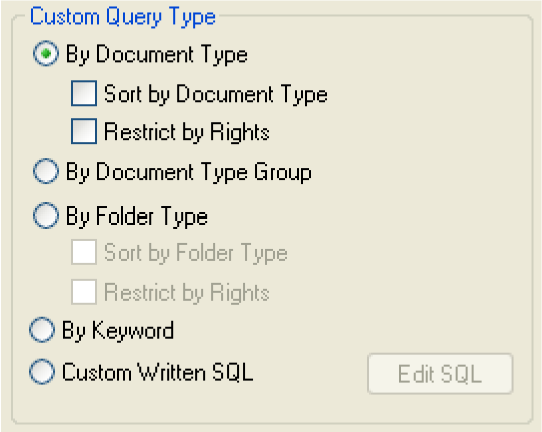
To configure a medical records custom query:

1. In OnBase Configuration, select **Queries | Custom Queries**.
2. Type a name for the new custom query in the field provided.
3. Click **Create**. The **Assign Custom Query to User Group** dialog box is displayed.

4. Assign the User Groups who need to see non-medical record documents within a clinical context.

Note: To view non-medical record documents using a clinical module, users need privileges to both the custom query and the Document Types assigned to the custom query.

5. Click **Close**. The **Custom Query Options** dialog box is displayed.
6. Ensure **By Document Type** is selected under **Custom Query Type**.



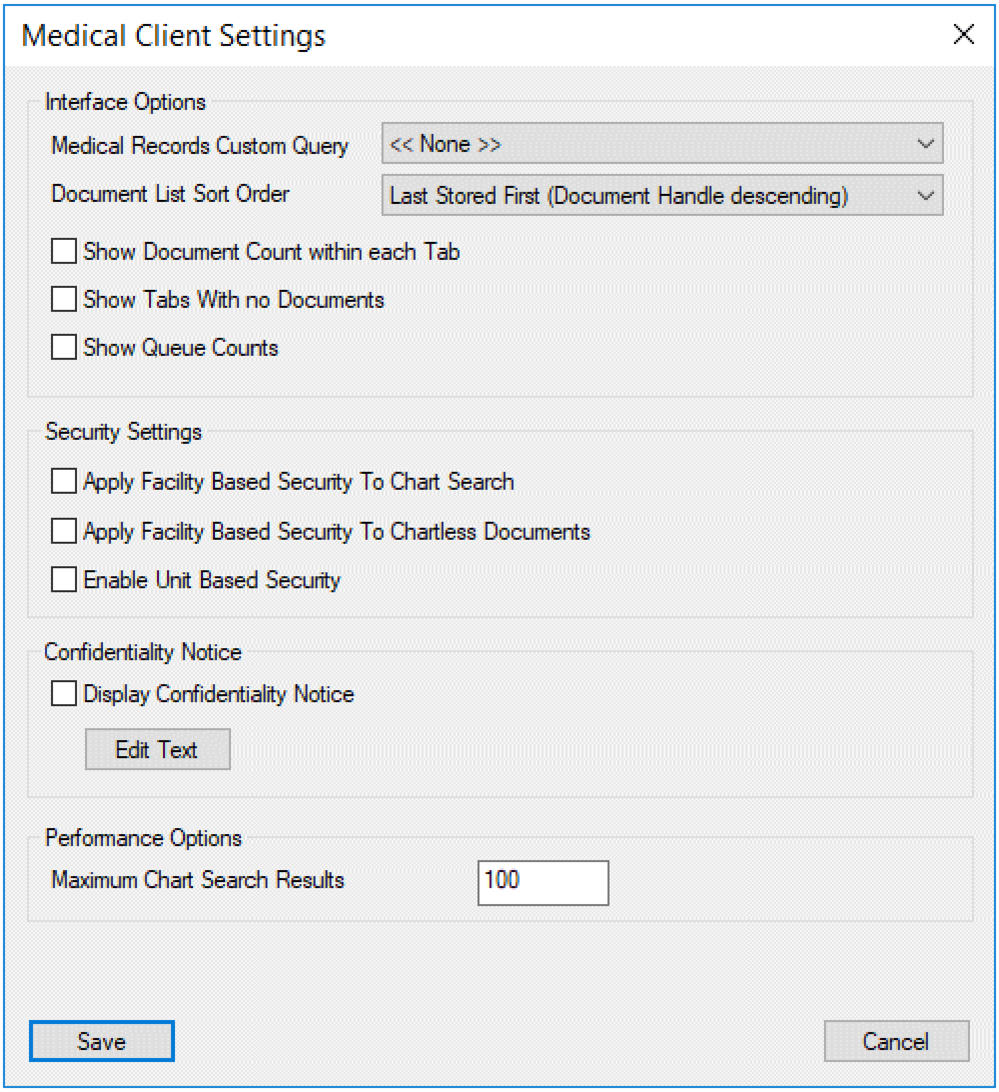
7. Click **Save**.
8. From the **Custom Query** dialog box, click **Document Type Query**.
9. Assign the Document Types containing the relevant documents. Ensure these Document Types are assigned the Keyword Types that will be used for retrieval.
10. Click **Close**.
11. From the **Custom Query** dialog box, click **Retrieval Keywords**.
12. Assign the Keyword Type that contains a unique value for each patient, such as the MRN or MPI.
13. Close the **Custom Query Retrieval Configuration** dialog box and the **Custom Query** dialog box.

Designating the Medical Records Custom Query

After configuring the custom query, you must configure OnBase to use it for retrieving documents in a clinical context.

To designate the medical records custom query:

1. In OnBase Configuration, select **Medical | User Interface Settings | Client Settings**. The **Medical Client Settings** dialog box is displayed.



2. Select the custom query from the **Medical Records Custom Query** drop-down list.
3. Click **Save**.

Physician Configuration

OnBase allows specific users to be configured as physicians. Physician users can be designated as the attending, admitting, or primary care physicians on charts in OnBase. In some modules, these users also have elevated chart access privileges.

See the following topics:

- Configuring Provider Specialties on page 173
- Configuring Physician Information on page 175
- Configuring Physician Medical Groups on page 178
- New Physician Queue on page 180
- Configuring the Physician Import Processor on page 184
- Deleting Physicians on page 197

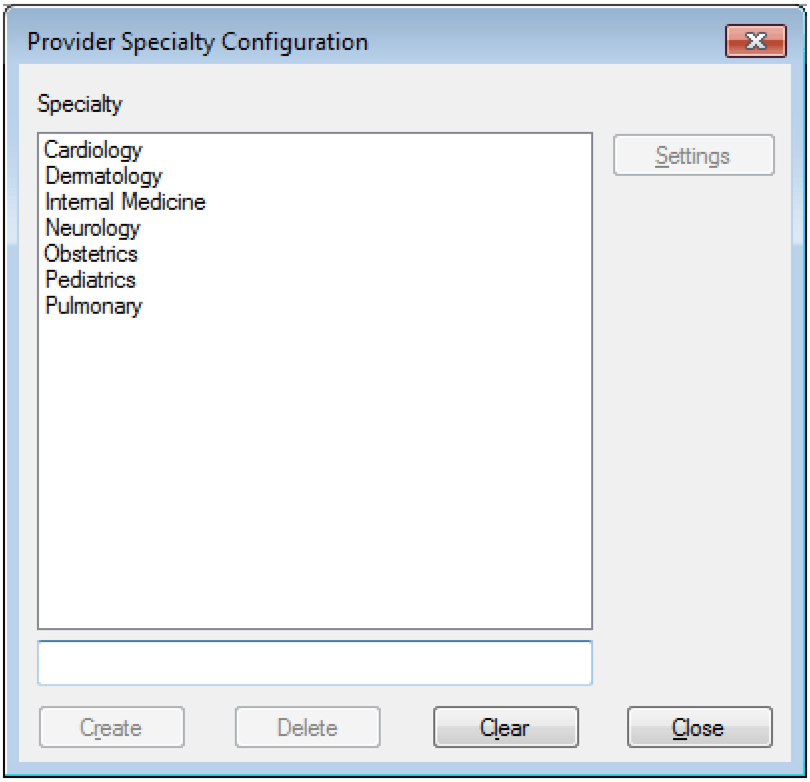
Configuring Provider Specialties

If a physician is associated with a primary specialty, analysts can look up the physician by primary specialty when assigning deficiencies. The ability to look up physicians by specialty is especially helpful if multiple physicians have the same name.

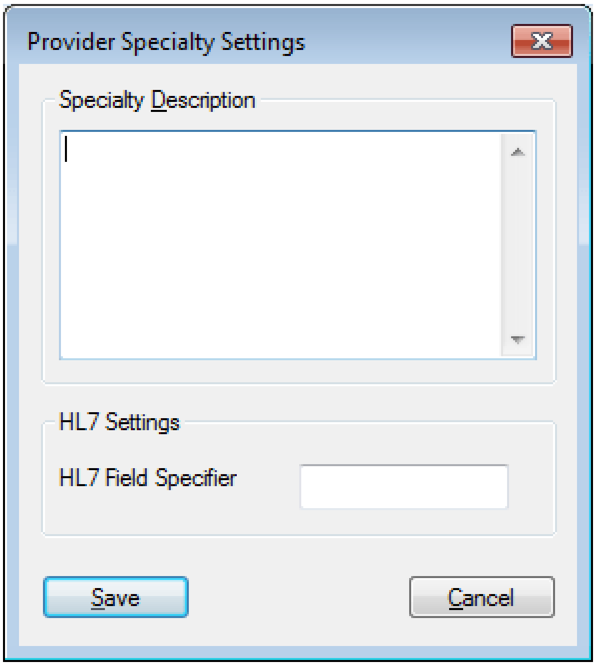
You can associate a physician with a primary specialty in Physician Information Configuration. For a specialty to be available, you must first configure it using Provider Specialty Configuration.

To configure a specialty, complete the following steps:

1. Select **Medical | Physicians | Provider Specialty**. The **Provider Specialty Configuration** dialog box is displayed.



2. Enter the name of the specialty and click **Create**. The **Provider Specialty Settings** dialog box is displayed.



3. Enter a description of the specialty.
4. Enter the HL7 code for the specialty in the **HL7 Field Specifier** field.
5. Click **Save**.

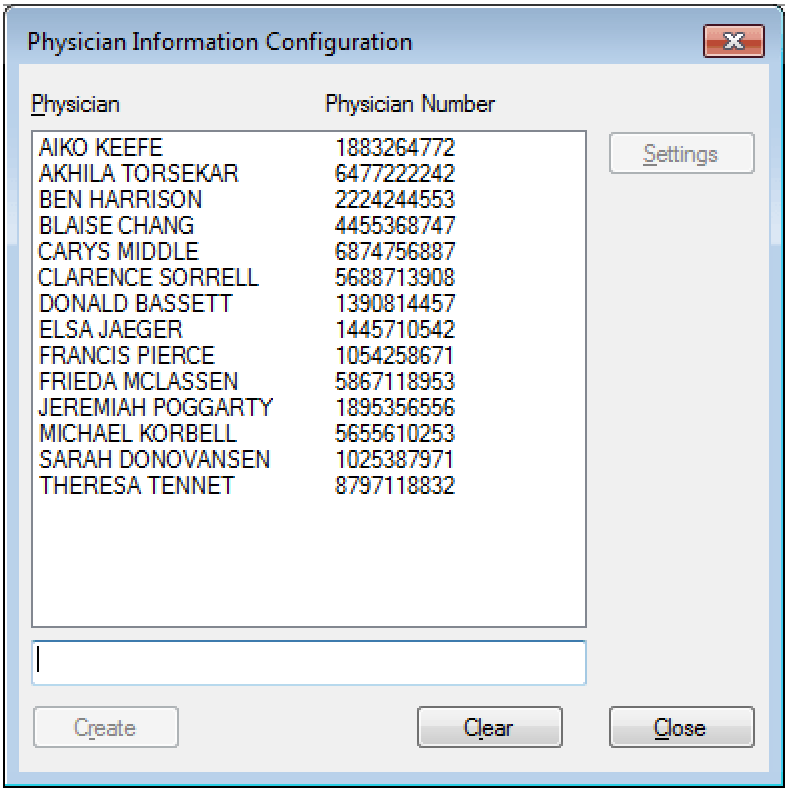
Configuring Physician Information

Physician Information Configuration allows you to provide personal and professional information for each physician. This information is mapped to a single user account in OnBase. This is a one-to-one relationship, ensuring that multiple physicians cannot be mapped to a single user account.

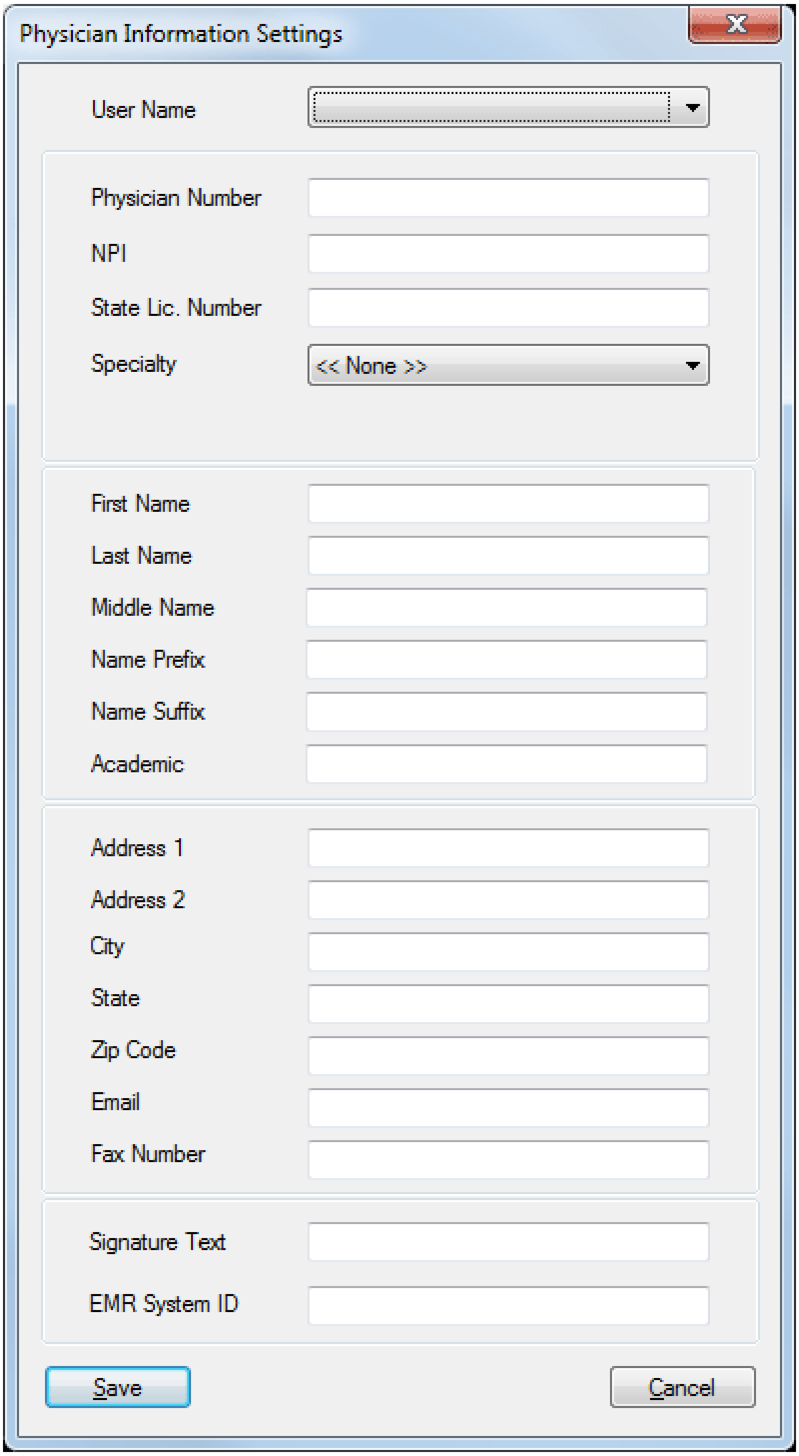
You can configure physician information using either OnBase Configuration or the Medical Records Unity Client.

To configure physician information using OnBase Configuration:

1. Select **Medical | Physicians | Physician Information**. The **Physician Information Configuration** dialog box is displayed.



2. Enter the name of the physician and click **Create**. The **Physician Information Settings** dialog box is displayed.



3. Select the physician's user account from the **User Name** drop-down list.

   If a physician's user account has been deleted from OnBase, then the user account is labeled as **deactivated**. You cannot assign a new physician to a deactivated account.

Caution: Ensure the correct user account is selected. Once you save the Physician Information Settings, the user account cannot be changed without the -MRMSINSTALL switch and password confirmation. Even with the switch applied, the user account cannot be changed if the physician is assigned or has completed any deficiencies. For a physician's deficiencies to be burned, the user account mapped to the physician during signing must be mapped to a physician at the time of burning. Contact your solution provider for assistance.

4. Enter the appropriate physician identification information. The **Physician Number** must be unique to each physician.
5. To store address information, complete the following fields:

Field	Description
Address 1	The street address for the physician.
Address 2	The second line of the address for the physician, if applicable.
City	The city for the physician.
State	The state for the physician.
Zip Code	The ZIP code for the physician.

6. In the **Signature Text** field, enter the physician's name as it should be displayed when the physician signs deficiencies.

Note: It is strongly recommended to configure the **Signature Text** field for physicians who will sign deficiencies. If the **Include Physician Number in Signature Text** setting is disabled in Medical System Settings, then the signature text is the only means of identifying the signing physician.

Note: The **EMR System ID** is not used by Signature Deficiencies for Epic.

7. Click **Save**.

Configuring Physician Medical Groups

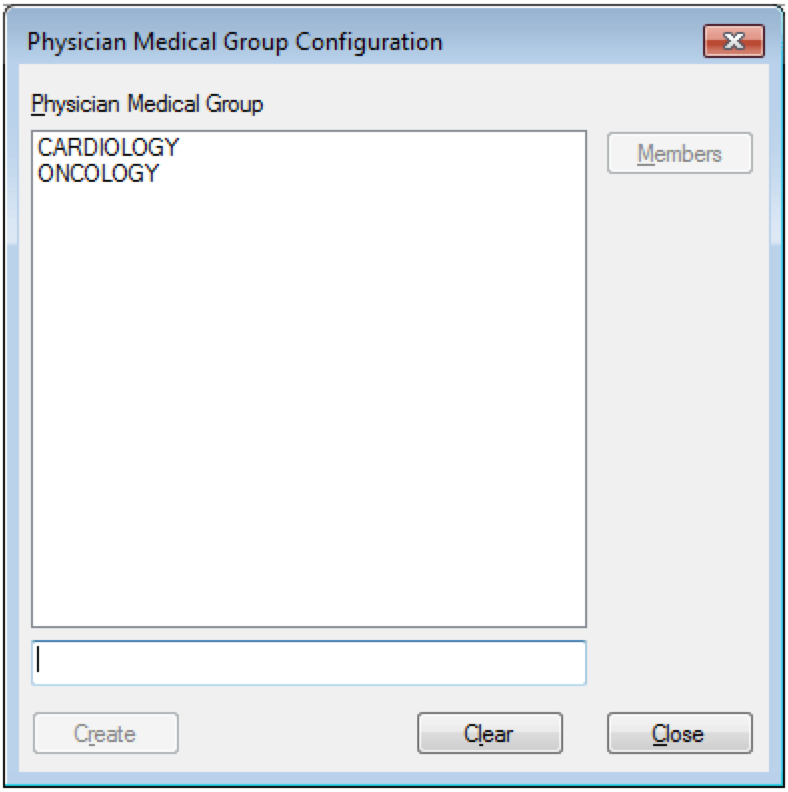
Physicians who belong to the same Physician Medical Group may cover (complete deficiencies) for each other.

Physicians who belong to the same Physician Medical Group can have different levels of coverage for each group member. Levels of access include viewing other physicians' charts, completing chart-level deficiencies, and completing any deficiencies.

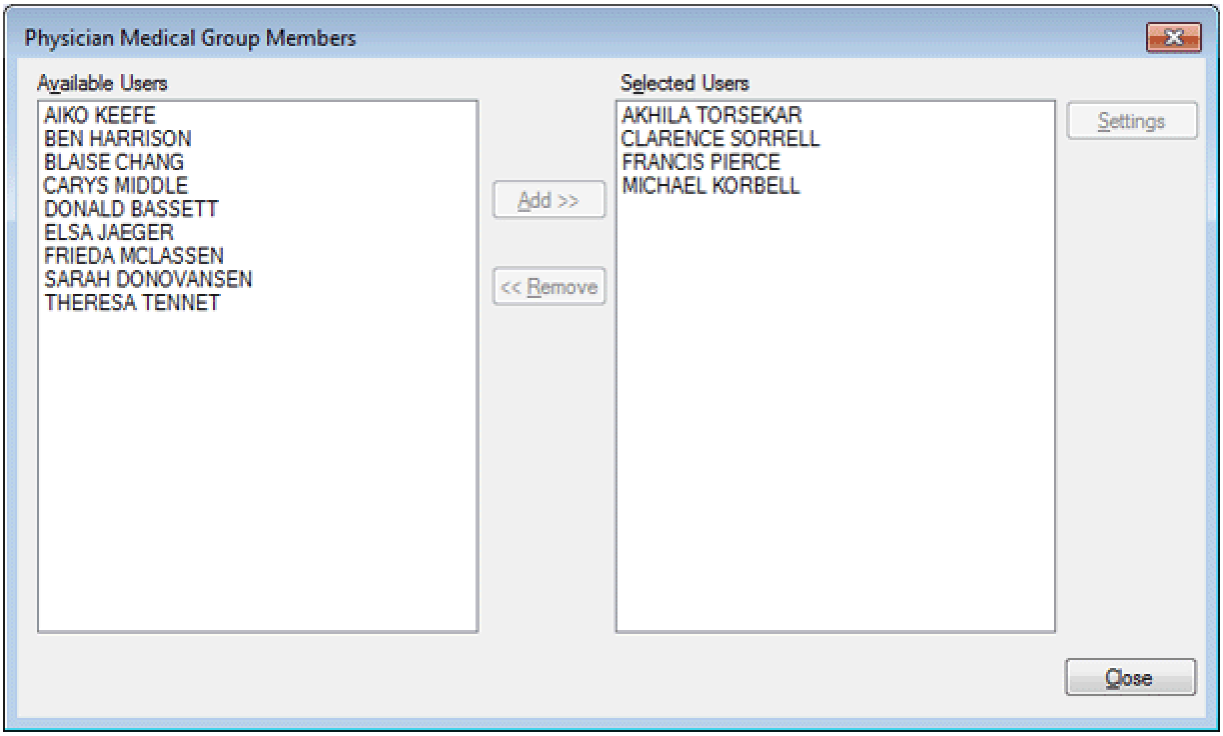
When one physician signs documents for another physician, the signature correctly reflects that a covering physician signed (Elec. Signed By Physician A for Physician B on date time).

To assign a physician to a Physician Medical Group:

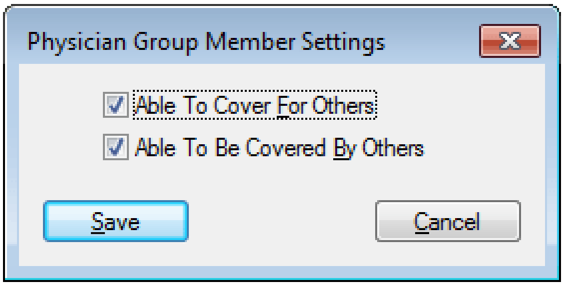
1. Select **Medical | Physicians | Physician Medical Groups**. The **Physician Medical Group Configuration** dialog box is displayed.



2. Type the name of the Physician Medical Group and click **Create**. The **Physician Medical Group Members** dialog box is displayed.



3. Select the appropriate physicians from the **Available Users** list and click **Add>>**.
4. Select a physician and click **Settings**. The **Physician Group Member Settings** dialog box is displayed.



5. If the selected physician can cover for other physicians in the Physician Medical Group, select **Able To Cover For Others**.
6. If other physicians in the Physician Medical Group can cover for the selected physician, select **Able To Be Covered By Others**.
7. Click **Save**.
8. When finished, click **Close**.

New Physician Queue

The HL7 **Create/update physician from Master File** import process can create and update physician users by processing master files from external systems. New physician users are automatically added to the **New Physician Queue**, where you can do the following:

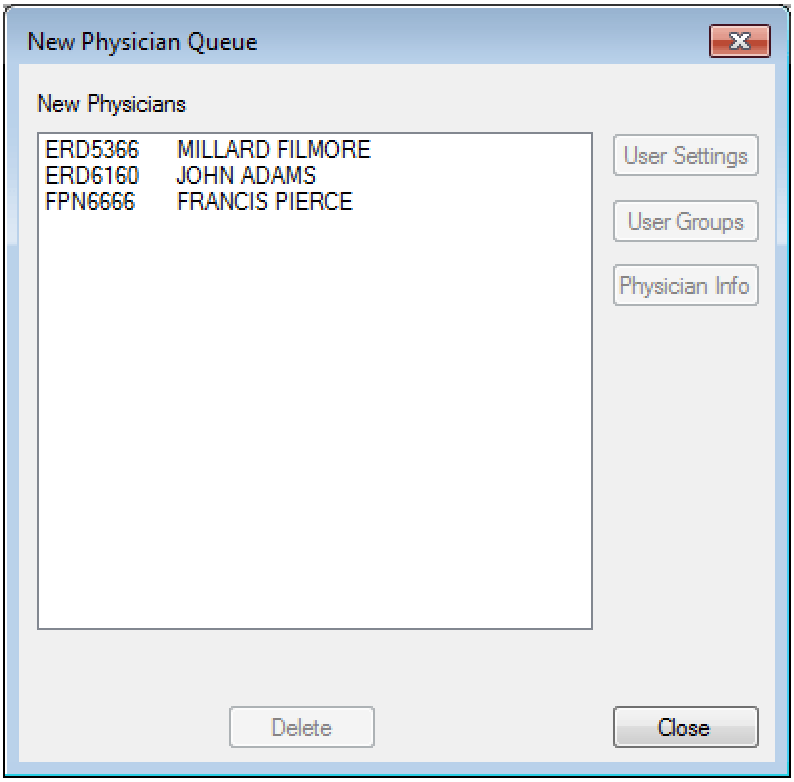
- Configure each physician's user settings.
- Add the physician to a User Group.
- Verify the physician's information.

Unless the HL7 import process is configured to add new physician users to a User Group, you must add them manually from the **New Physician Queue**. New physician users must be assigned passwords before they can log on to OnBase.

Note: Only physician users can be created/updated. To limit the process to create/update physician users only, the STF.4 field should be configured to filter on a value of **Physician** in HL7 Message Template configuration. For information about configuring the HL7 module to process master files, see the HL7 help files.

To configure new physicians created by HL7:

1. Select **Medical | Physicians | New Physician Queue**. The **New Physician Queue** dialog box displays new physician users created by the HL7 Import Process.

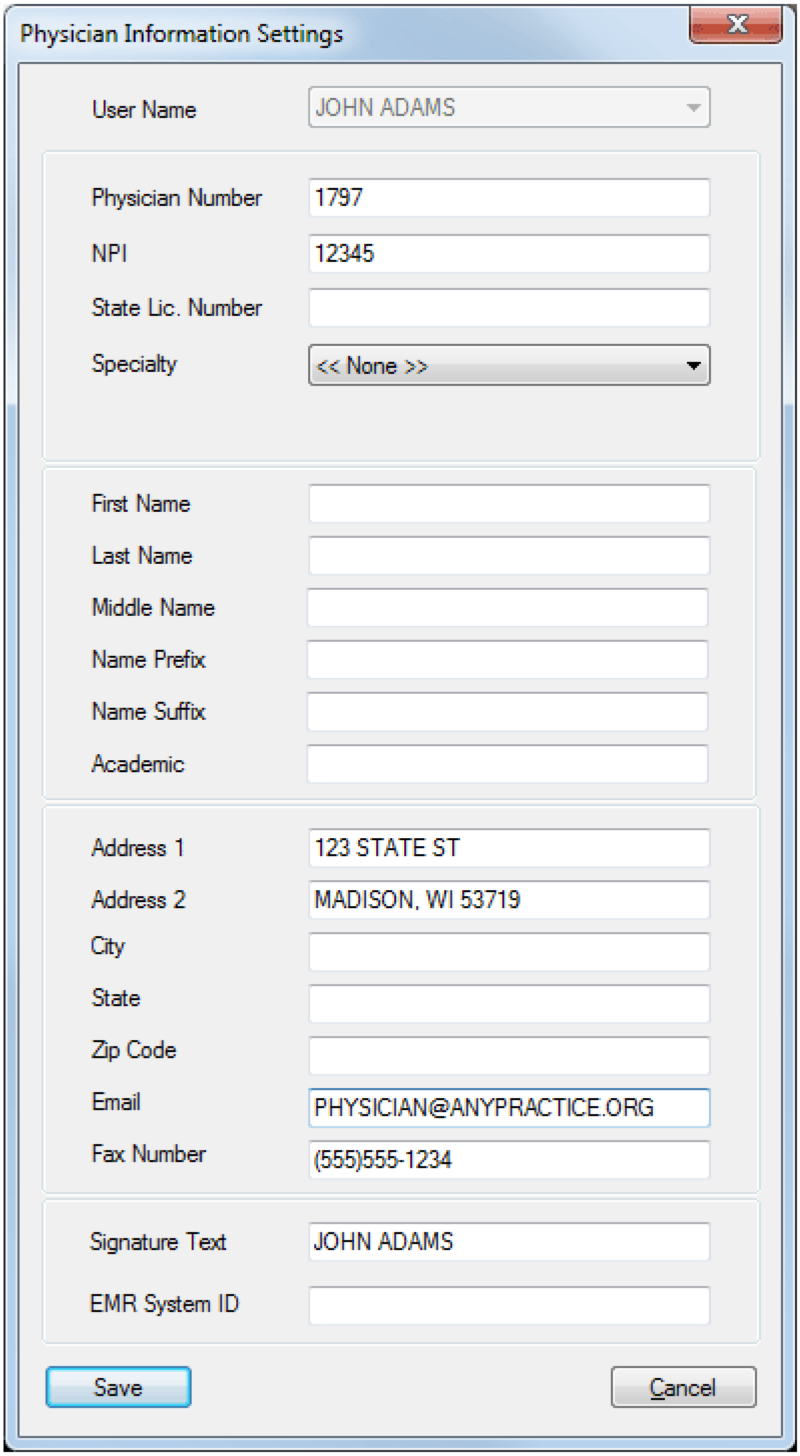


2. Select a physician and click **User Settings**. The **User Settings** dialog box is displayed. Some fields are automatically populated with information from the HL7 message.

3. Select **Update Password**. Type and verify the physician's password.
4. Enter or edit any user settings as needed.

   For more information about the settings in this dialog box, see the Configuration module help.
5. Click **Save**.
6. Click **User Groups**. The **Groups** dialog box is displayed. Select the physician's User Group(s) and click **Add**.
7. Click **Close**.

8. Click **Physician Info**. The **Physician Information Settings** dialog box is displayed. Some fields are automatically populated with information from the HL7 message.



9. Enter or edit the physician's information as needed.

10. Click **Save**.

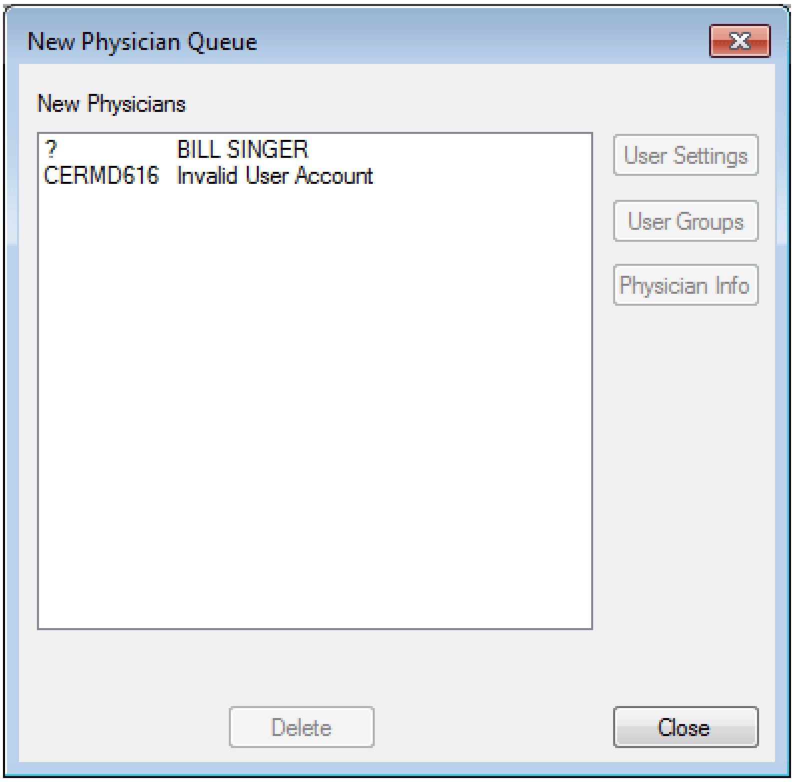
    After configuring a physician's information, you can remove the physician from the **New Physician Queue**.

11. Select the physician and click **Delete** to remove the physician's name from the **New Physician Queue**. (The physician is not removed from OnBase.)
12. Click **Close** when finished. If your system is configured to use Physician Medical Groups, add the new physician to the appropriate Medical Groups.

Addressing Invalid Accounts

If a new physician's account information is invalid, the **New Physician Queue** displays either a question mark or the message **Invalid User Account**.

- If **?** is displayed for the Physician Number, then the OnBase user account is not set up as a physician in OnBase. To remove the physician from this list, click **Delete**. To map the physician to an existing user account, go to **Medical | Physicians | Physician Information**.
- If **Invalid User Account** is displayed for a physician's name, then the physician's OnBase user account has been deactivated. To remove the physician from this list, select the invalid user account and click **Delete**.



Configuring the Physician Import Processor

The Physician Import Processor provides a way to bulk-create and update physician users in OnBase. The processor works by using information in an import file to create and update physician user accounts.

To configure a physician import process, see the following topics:

- Requirements for the Physician Import File on page 184
- Requirements for Updating Physicians on page 184
- Requirements for Deactivating Physicians on page 185
- Creating a Physician Import Process on page 186
- Specifying a Process Path on page 187
- Configuring Formatting Settings on page 188
- Defining the Field Order on page 190
- Assigning Privileges to Run the Physician Import Processor on page 196

Requirements for the Physician Import File

The import file is a text file containing physician data that should be created or updated in OnBase. Some EMR applications provide the ability to export this type of file.

The import file must satisfy the following requirements:

- The file must be a text (.txt) file.
- At a minimum, the following values must be provided for each physician:
  - User Name
  - Physician Name
  - Physician Number
  - Either the name or ID number for the User Group the new user should be added to

The expected field order and formatting are configurable. For information about available fields, see Available Fields on page 191.

The following illustration provides an example of data in an import file.

```
"HMICHAELS","HEATHER MICHAELS","E1132111","PHYSICIANS","3119807351"
"AANDERSON","ASHTON ANDERSON","E1385357","PHYSICIANS","3118986813"
"CSMITH","CINDY SMITH","E1102098","PHYSICIANS","3137824238"
"ITHOMAS","INGRID THOMAS","E1121543","PHYSICIANS","3111538968"
```

Requirements for Updating Physicians

The Physician Import Processor can update Physician Information Settings for existing physicians. Existing physicians can be identified based on their user name, Physician Number, or EMR System ID. To update the Physician Number or EMR System ID for an existing physician, see Updating Unique Identifiers on page 185.

Only physician information can be updated. The Physician Import Processor will not update the user account, user settings, or User Group membership for an existing physician.

Updating Unique Identifiers

The Physician Import Processor can update the Physician Number and EMR System ID for an existing physician, provided these values remain unique.

The Physician Import Processor checks the following, in order of precedence:

- If the specified user name matches an existing physician, then the import process can update the physician's Physician Number and EMR System ID, provided the new values are unique.
- If no user name is provided, but the specified Physician Number matches an existing physician, then the import process can update the physician's EMR System ID, provided the new value is unique.
- If no user name is provided, but the specified EMR System ID matches an existing physician, then the import process can update the physician's Physician Number, provided the new value is unique.

The Physician Import Processor cannot change the user account mapped to an existing physician. If you attempt to change a physician's user name, the verification report displays an error saying a user name already exists for the physician.

Requirements for Deactivating Physicians

The Physician Import Processor can deactivate physicians by deleting their user accounts and marking them as deactivated in Physician Information Settings.

Only physicians without any outstanding deficiencies can be deactivated. If a physician has deficiencies assigned, then the physician cannot be deactivated until the deficiencies are confirmed.

Note: Once a physician is deactivated, the Physician Import Processor cannot reactivate the physician. If you foresee a need to reactivate physicians, do not use deactivation. Instead, lock the physicians' user accounts using the **>>Lock User Account** field. This approach allows you to unlock the user accounts in the future, if necessary. See >>Lock User Account on page 192.

The import process deactivates physicians using the **>>Deactivated** field of the import file.

- Use a value of **1** to deactivate an active physician and the associated user account.
- Use a value of **0** to indicate an active physician and the associated user account should remain active. This value will not reactivate a deactivated account.

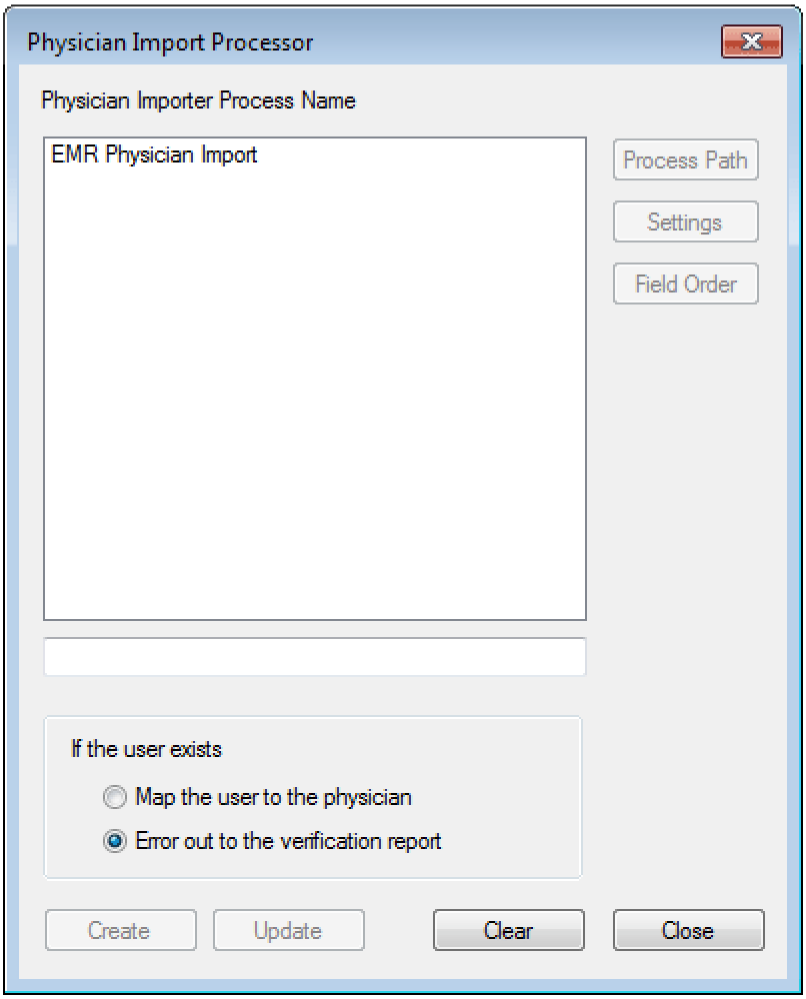
If a user account that does not exist in OnBase has a **>>Deactivated** value of **1**, then the user account will be created and deactivated.

Creating a Physician Import Process

The Physician Import Processor is configured through physician import processes. These import processes are created in OnBase Configuration.

To create a physician import process:

1. Select **Import | Physician Import Processor**. The **Physician Import Processor** dialog box is displayed.



2. Type the import process name in the field provided.

3. Select one of the **If the user exists** options. These options control what happens when the import file specifies an existing user account that is not mapped to a physician.
   - **Map the user to the physician**—The processor creates the new physician information and maps it to the existing user account.
   - **Error out to the verification report**—The processor writes an error to the verification report, and no new physician information is created. The error specifies the name of the existing user account.

   These options do not apply to situations where the specified user account is already mapped to a physician. In this case, the settings for the mapped physician are updated to match the settings provided in the import file.
4. Click **Create**.

Tip: To change the **If user exists** option for an existing process, select the process, change the option, and then click **Update**.

5. Continue to the following procedures:
   - Specifying a Process Path on page 187
   - Configuring Formatting Settings on page 188
   - Defining the Field Order on page 190
   - Assigning Privileges to Run the Physician Import Processor on page 196

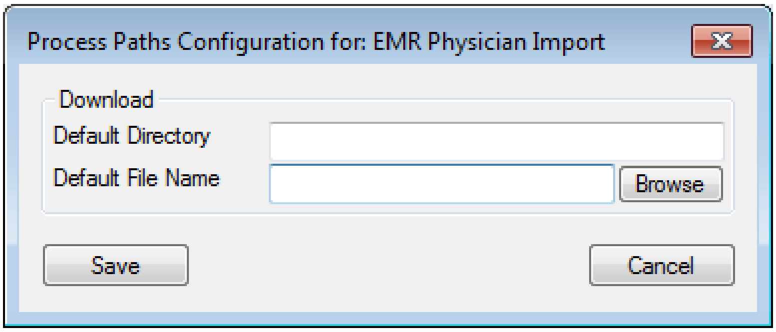
   For information about updating existing physicians, see Requirements for Updating Physicians on page 184.

Specifying a Process Path

Configure the process path to specify the name of the physician import file and where it resides.

To configure the process path:

1. Select the import process.
2. Click **Process Path**. The **Process Paths Configuration** dialog box is displayed.



3. Do one of the following:
   - Click **Browse** to navigate to the directory where the import file will be stored. Select the import file, and then click **Open**.
   - Type the directory and file name in the **Default Directory** and **Default File Name** fields.

   The **Default File Name** field supports wildcards, such as * and **?**. For example, set the **Default File Name** to *.* if the Physician Import Processor should process all files in the specified directory.

Note: The **Default Directory** path and **Default File Name** value each must be 60 characters or fewer.

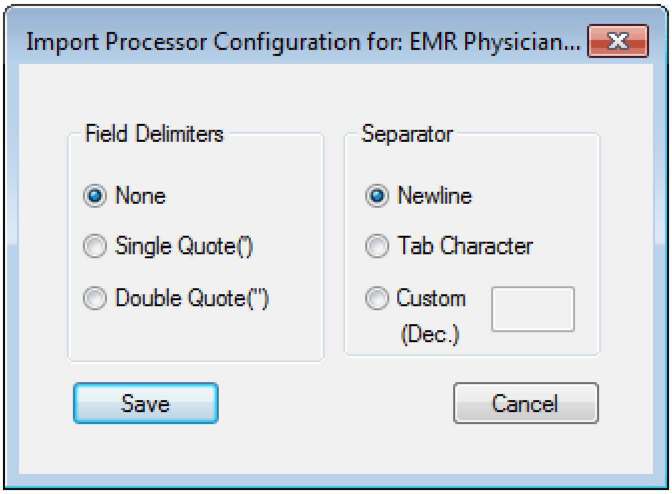
4. Click **Save**.
5. Continue to Configuring Formatting Settings on page 188.

Configuring Formatting Settings

Physician import process settings define how the file is formatted using delimiters and separators.

To configure formatting settings in OnBase Configuration:

1. Select the import process.
2. Click **Settings**. The **Import Processor Configuration** dialog box is displayed.



3. Under **Field Delimiters**, select one of the options described in the following table.

   Field delimiters enclose each field value. Delimiters are necessary if a field value might contain the separator symbol, which is used to separate fields.

Field Delimiter	Description
None	Individual field values are not enclosed within characters. In the following example, the values are separated with commas. No delimiters are present. **110, JAMES POLK, WESTLAKE OH** **Note:** Do not select **None** if values might contain the configured separator symbol.
Single Quote (')	Individual field values are enclosed within single quotation marks. In the following example, the values are separated with commas and delimited with single quotation marks. **'110', 'JAMES POLK', 'WESTLAKE, OH'**
Double Quote (")	Individual field values are enclosed within double quotation marks. In the following example, the values are separated with commas and delimited with double quotation marks. **"110", "JAMES POLK", "WESTLAKE, OH"**

Note: If a field value contains a character that is also used as a delimiter, then you must type the character twice in succession in order for it to be parsed correctly. For example, **'Smith's Parkway'** must be typed as **'Smith''s Parkway'** to be parsed correctly. The extra character will not be included in the stored field value.

4. Under **Separator**, select one of the options described in the following table.

   Separators separate field values from each other. They mark the end of one field and the start of another.

Separator	Description
Newline	A new line separates each field.
Tab	A tab character separates each field.
Custom	A specific character separates each field. If the physician import file does not use either of the above two separators, select this option. In the text box, type the specific character that occurs between each field.

5. Continue to Defining the Field Order on page 190.

Defining the Field Order

Field order configuration allows OnBase to identify the physician import file components based on their order in a sequence. For information about available fields, see Available Fields on page 191.

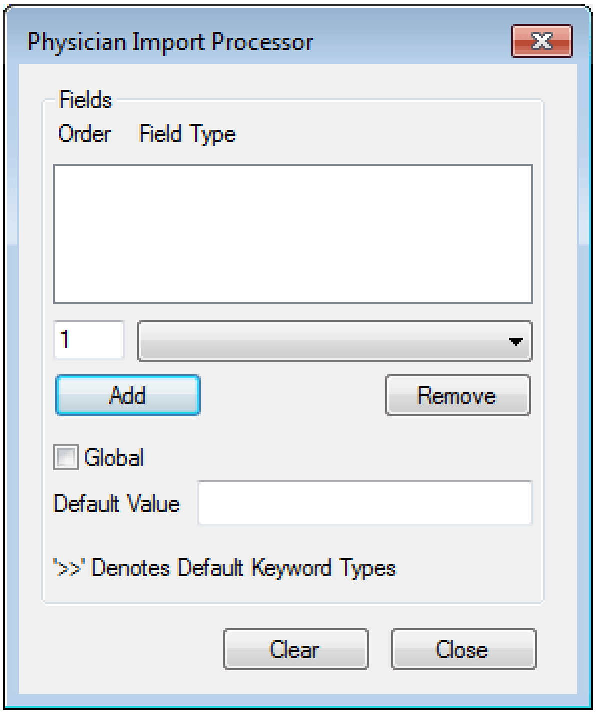
The following fields must be configured:

- **User Name**
- **Physician Name**
- **Physician Number**
- Either **User Group** or **UserGroup Number**

If any of these fields is not configured, a warning message is displayed when you attempt to close the field order dialog box.

To define the field order:

1. Select the import process and click **Field Order**. The **Physician Import Processor** dialog box is displayed.



   This dialog box allows you to map physician and user settings to their respective positions in the physician import file.

2. In the **Order** field, type the setting's position in the import file. For example, a value of **2** indicates the setting is provided in the second field for each physician.
   - This value automatically increments when you add a field.

- No order is needed for global values. Because global values are applied to all physicians created using the Physician Import Processor, they are not needed in the import file. To create a global value, see Applying a Global Value on page 195.

3. From the drop-down, select the physician or user setting that occurs in that position. For information about available fields, see Available Fields on page 191.
4. In the **Default Value** field, type a default value to use in case the field is blank. If the field has a value in the import file, then the value in the import file is used.
5. Click **Add**.
6. Repeat for each applicable physician user setting.
7. Click **Close**.
8. See Assigning Privileges to Run the Physician Import Processor on page 196.

Available Fields

Available fields are described in the following table:

Field	Description
>>Academic	Specifies the physician's academic degree (e.g., MD). This field allows a maximum of 50 characters.
>>Address1	Specifies the first line of the address (**Address 1**) as it should appear in Physician Information Settings. This field allows a maximum of 80 characters.
>>Address2	Specifies the second line of the address (**Address 2**) as it should appear in Physician Information Settings. This field allows a maximum of 80 characters.
>>City	Specifies the city as it should appear in Physician Information Settings. This field allows a maximum of 75 characters.
>>Deactivate	Specifies whether the physician should be deactivated. A value of **1** indicates that the physician should be deactivated. A value of **0** indicates that the physician should not be deactivated. Fore more information, see Requirements for Deactivating Physicians on page 185.
>>Dummy Key	Field value should be ignored. Import files generated by external systems may contain data that is irrelevant to physician configuration in OnBase.
>>Email	Specifies the **Email** as it should appear in Physician Information Settings and the **User's Email** as it should appear in User Settings. This field allows a maximum of 80 characters.

Field	Description
>>EMR System ID	Specifies the **EMR System ID** as it should appear in Physician Information Settings. This field is used by the OnBase solutions for Meditech. The field allows a maximum of 15 characters. For information about updating existing physicians based on EMR System ID, see Requirements for Updating Physicians on page 184. **Note:** If supplied, this value must be unique for each physician.
>>Fax Number	Specifies the **Fax Number** as it should appear in Physician Information Settings. This field allows a maximum of 30 characters.
>>First Name	Specifies the physician's first name. This field allows a maximum of 50 characters.
>>Last Name	Specifies the physician's last name. This field allows a maximum of 50 characters.
>>Lock User Account	Specifies whether the physician's user account should be locked. A value of **LOCK** indicates that the user account should be locked. A value of **UNLOCK** indicates that the user account should be unlocked. **Note:** This field is case sensitive. If LOCK and UNLOCK are not uppercase as shown here, the field will be ignored. Account locking provides an alternative to deactivation. For more information, see Requirements for Deactivating Physicians on page 185.
>>Middle Name	Specifies the physician's middle name. This field allows a maximum of 50 characters.
>>Name Prefix	Specifies the prefix to the physician's name (e.g., DR). This field allows a maximum of 10 characters.
>>Name Suffix	Specifies the suffix to the physician's name (e.g., JR or III). This field allows a maximum of 50 characters.
>>NPI	Specifies the physician's **NPI** as it should appear in Physician Information Settings. This field allows a maximum of 20 characters.

Field	Description
>>Password	Specifies the physician's OnBase password. Ensure passwords satisfy the appropriate password policy, if one is configured. If a password does not satisfy the password policy in effect, the physician will be required to change the password upon login. See the Configuration help files for information about password policies. **Note:** If the import file does not provide a password for a physician, then the physician is assigned a default OnBase password. To obtain this password, contact your solution provider. For stronger security, ensure the import file provides a unique, confidential password for each physician.
>>Physician Name	Specifies the physician's name as it should appear in Physician Information Configuration. This field allows a maximum of 100 characters. **Note:** Each physician must have a unique name to ensure only one physician is assigned per OnBase user. The import process cannot create a new physician if this value matches another physician's. This field is required.
>>Physician Number	Specifies the physician's **Physician Number** as it should appear in Physician Information Settings. This field allows a maximum of 20 characters. For information about updating existing physicians based on Physician Number, see Requirements for Updating Physicians on page 184. **Note:** The Physician Number must be unique to each physician. This field is required.
>>Physician Signature Text	Specifies the physician's **Signature Text** as it should appear in Physician Information Settings. This field allows a maximum of 100 characters. **Note:** This field applies only to deficiency completion.
>>PhysicianGroupName	Specifies the name of the Physician Medical Group that the physician belongs to. Physician Medical Groups are configured in OnBase Configuration under **Medical | Physicians | Physician Medical Groups**. This field allows a maximum of 50 characters. To add a physician to multiple Medical Groups, ensure the physician import file lists the physician multiple times: once for each Medical Group the physician belongs to.

Field	Description
>>Real Name	Specifies the physician's **Real Name** as it should appear in User Settings. This field allows a maximum of 100 characters.
>>Secondary Signer	Specifies whether the physician is a secondary signer. A value of **0** turns off the **Secondary Signer** setting in Physician Information Settings. Any other numeric value, such as **1**, turns on this setting.
>>Specialty HL7 Name	Specifies the physician's specialty by its HL7 field specifier, which is configured in Provider Specialty Configuration. This field allows a maximum of 30 characters.
>>Specialty Name	Specifies the name of the physician's specialty, which is configured in Provider Specialty Configuration. This field allows a maximum of 50 characters.
>>State	Specifies the state as it should appear in Physician Information Settings. This field allows a maximum of 30 characters.
>>State Lic Number	Specifies the state license number as it should appear in Physician Information Settings. This field allows a maximum of 20 characters.
>>User Group	Specifies the name of the User Group the physician should be added to. This field allows a maximum of 128 characters. Either this field or **UserGroup Number** must be configured. **Tip:** If all physicians in the file will belong to the same User Groups, configure the **User Group** or **UserGroup Number** field as a global value. Create a global value for each User Group the physicians should belong to. See Applying a Global Value on page 195.
>>User Name	Specifies the **User's User Name** as it should appear in User Settings. This field allows a maximum of 75 characters. For information about updating existing physicians based on user name, see Requirements for Updating Physicians on page 184. **Note:** Each physician must have a unique user name to ensure only one physician is assigned per OnBase user. This field is required.

Field	Description
>>UserGroup Number	Specifies the internal ID number of the User Group the physician should be added to. Either this field or **User Group** must be configured. **Tip:** If all physicians in the file will belong to the same User Groups, configure the **User Group** or **UserGroup Number** field as a global value. Create a global value for each User Group the physicians should belong to. See Applying a Global Value on page 195.
>>Zip	Specifies the ZIP code as it should appear in Physician Information Settings. This field allows a maximum of 10 characters.

Applying a Global Value

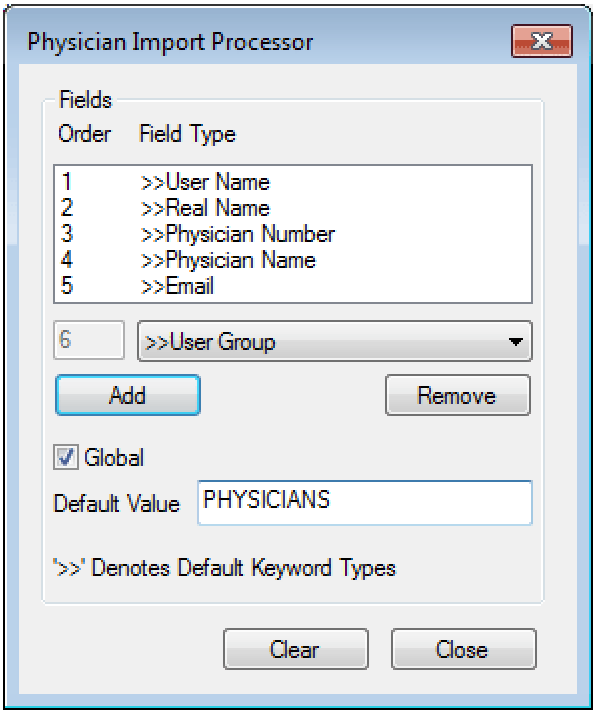
Global values are default values provided for every physician imported using the import process. For example, if every physician should belong to the **Physicians** User Group, then you could make **Physicians** the global value for the **User Group** setting.

Global values are not assigned an order in the import file. Because global values apply to every imported physician, the corresponding field types do not need to be present in the import file.

To create a global value:

1. From the **Field Type** drop-down, select the physician setting you want to populate.
2. Select **Global**.

3. In the **Default Value** field, type the default value to assign to physicians.



4. Click **Add**.

Assigning Privileges to Run the Physician Import Processor

To run a physician import process in the OnBase Client, a user must have the **Physician Importer** medical record privilege. To schedule a physician import process, the user also must have the **Scheduling** Product Right.

To assign User Group privileges for the Physician Import Processor:

1. In OnBase Configuration, select **Users | User Groups / Rights**.
2. Select the User Group that requires this privilege.
3. Click **Medical Rec Privileges**.
4. Click the **Administration** tab.
5. Select **Physician Importer**. This privilege allows users to execute physician import processes in the OnBase Client (under **Processing | Physician Importer**).
6. Click **OK**.
7. Click **Product Rights**.
8. Under **Administrative Processing Privileges**, select **Scheduling**.
9. Click **Save**. The User Group now can schedule physician import processes in the OnBase Client.

   For usage information, see Importing Physicians on page 268.

Deleting Physicians

Some systems, especially those with teaching hospitals, may have a high rate of physician turnover. To keep physician lists up to date in the various OnBase clients, you can deactivate user accounts for physicians who have left the system.

Note: Physicians who have outstanding deficiencies cannot be deleted from OnBase.

The best practice for deleting a physician is to delete the associated user account by using the Medical Records Unity Client or OnBase Configuration. When a physician's user account is deleted from OnBase, the user account is labeled as **deactivated** in the **Physician Information Settings** dialog box. The physician's information is preserved in OnBase for reporting, chart searches, and historical chart demographics.

To delete physicians listed in the **Physician Information Configuration** dialog box, contact your first line of support. All links to the physician should be removed in all associated medical applications prior to the physician's removal from OnBase.

Chart Data Field Configuration

Chart data fields allow charts to be indexed with patient and visit information. Through keyword mapping, chart data fields populate values in chart-based and MRN-based AutoFill Keyword Sets, and they define how documents are matched to charts and patient records. Certain fields are used for specific types of processing through the HL7 module.

Caution: Each chart data field is intended to store a specific piece of information. Do not reconfigure a field to store other types of information, even if the field appears unused. Fields that appear unused may have a role in internal processing.

See the following topics:

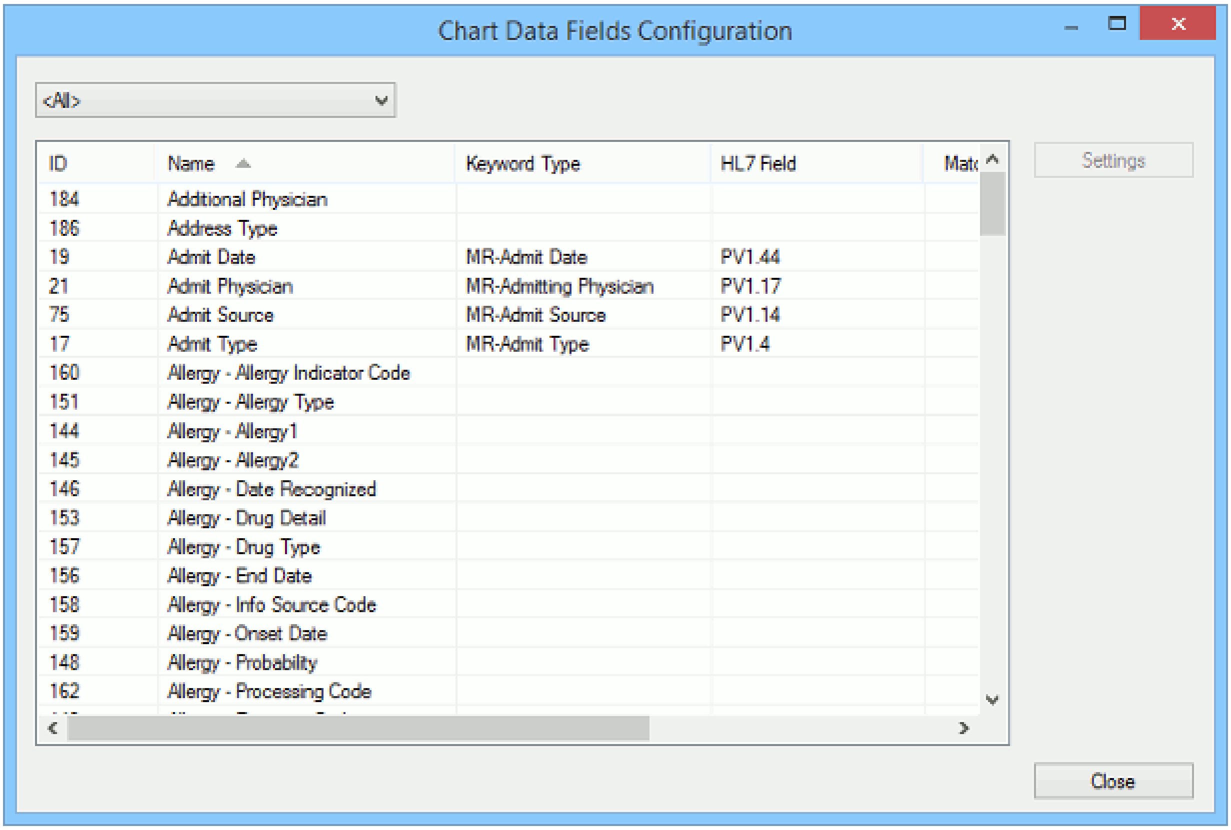
- Configuring a Chart Data Field on page 199
- Mapping Requirements on page 203
- Pulling Values from Repeating HL7 Fields on page 206

Configuring a Chart Data Field

Chart data field configuration allows you to modify the keyword and HL7 settings for a specific chart data field. Chart data fields are configured in OnBase Configuration.

To configure a chart data field:

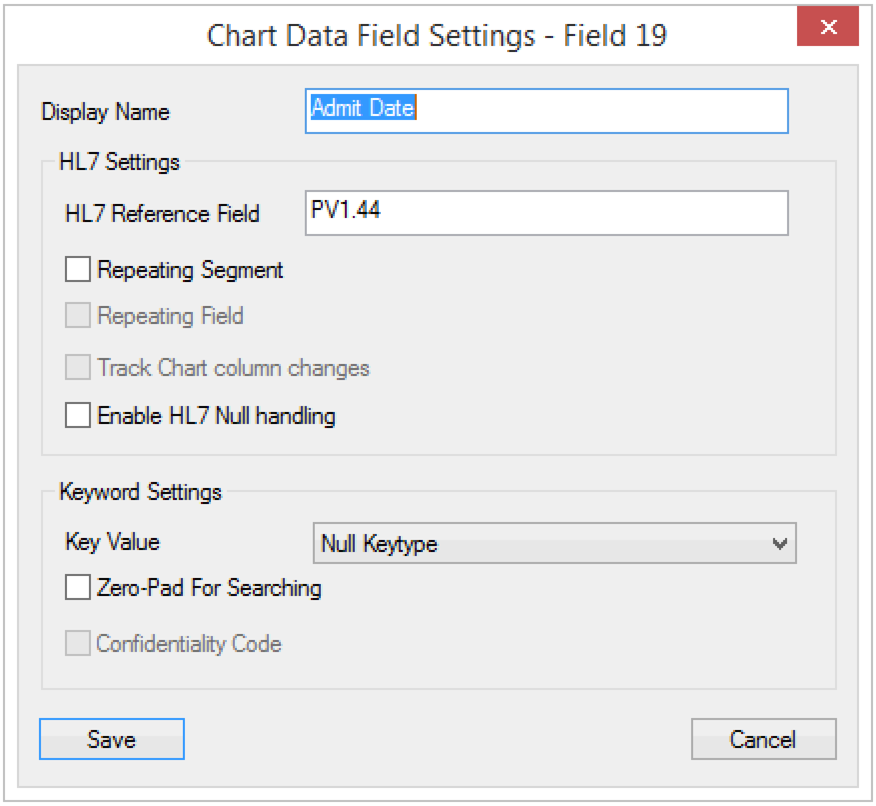
1. Select **Medical | Charts | Data Fields**. The **Chart Data Fields Configuration** dialog box is displayed.



   For each chart data field, the dialog displays the field ID, display name, and current settings. Settings are described later in this procedure.

2. Select a chart data field.
   - To sort the list of fields, click a column header.
   - To filter the list by category, select a category from the drop-down list in the upper-left corner of the dialog.

3. Click **Settings**. The **Chart Data Field Settings** dialog box is displayed.



4. Modify the display name as needed. The display name is respected in modules such as the Medical Records Unity Client and OnBase Patient Window.
5. Modify the available settings as described in the following topics:
   - HL7 Reference Field on page 201
   - Repeating Segment on page 201
   - Repeating Field on page 201
   - Track Chart Column Changes on page 201
   - Enable HL7 Null Handling on page 202
   - ID Number Keyword Type on page 202
   - Assigning Authority on page 202
   - Key Value on page 203
   - Zero-Pad For Searching on page 203
   - Confidentiality Code on page 203

Note: For some chart data fields, certain settings may be unavailable due to usage restrictions.

6. Click **Save**.

HL7 Reference Field

The **HL7 Reference Field** specifies the default HL7 field from which chart data is extracted. If a specific HL7 message template needs to override the setting configured here, assign a chart field override to the template.

Use the HL7 standard format to identify the field. For example, **PV1.3.4** indicates that the value is in segment **PV1**, field **3**, component **4**.

To pull a single value from a specific instance of a repeating field, see Pulling Values from Repeating HL7 Fields on page 206.

Repeating Segment

The **Repeating Segment** setting is intended for repeating HL7 segments. If an HL7 message contains repeating segments, this setting allows the specified chart to be associated with the value from each instance of the HL7 reference field.

For example, if this option is selected for the **Diagnosis Code** chart data field and an HL7 message contains multiple diagnosis segments, the HL7 module will associate each specified diagnosis with the chart.

Repeating Field

The **Repeating Field** setting applies to repeating HL7 fields. This setting allows the HL7 Scripted Merge Processor to perform processing for each MRN and assigning authority provided in an MRG segment. If this setting is not selected, only the MRN and assigning authority in the first instance of the field will be processed.

This setting is available only for the **Merge Medical Record #** field. It affects only the Scripted Merge Processor message action.

Track Chart Column Changes

Select the **Track Chart column changes** setting if the HL7 module should track when a chart's values change for this data field.

Facility, unit, and bed changes are visible in the Patient Location section of the History window in the Medical Records Unity Client. If tracking is enabled for the **Room** field, the Patient Location section also displays any room changes.

Note: Only changes made through HL7 messages are tracked, and only changes to the facility, unit, room (Unity only), and bed can be viewed.

Enable HL7 Null Handling

Select the **Enable HL7 Null handling** setting to allow an HL7 message containing a null value to delete the associated chart data value from the specified chart.

Note: If you are using one of the OnBase Medical Records products for Coding or Completion, do not select this setting on a field used for chart processing. Deleting a chart value could adversely affect the process. For assistance, contact your first line of support.

The **Enable HL7 Null handling** setting is available for a limited set of chart data fields.

- This setting is enabled by default for the **Discharge Date** field.
- It is considered a best practice to select this setting for the **Patient Deceased Date** field.

In HL7 messages, null values are represented by two single or double quotation marks. A null value received through HL7 will not affect the value already present on the specified chart, unless the **Enable HL7 Null handling** setting is selected for the associated chart data field.

ID Number Keyword Type

For the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields, the **ID Number Keyword Type** drop-down list is displayed. Select the OnBase Keyword Type to associate with this identifier.

It is considered a best practice to use alphanumeric Keyword Types for the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields. Ensure the selected Keyword Type is also assigned to Document Types.

Assigning Authority

For the **Chart ID #**, **Medical Record #**, and **MPI Number** chart data fields, an additional **Assigning Authority** section is available in the **Chart Data Field Settings** dialog box. Only change the settings in this section if your system needs to be configured to use overlapping values for these identifiers.

Note: Signature Deficiencies for Epic does not support the use of assigning authorities with the **Chart ID #** field (which is field #10). If the **Chart ID #** field is configured to require an assigning authority, then the Analysis and Signing components will be unable to retrieve documents using the values passed from Epic.

See the OnBase **HL7** documentation for information about configuring chart data fields for assigning authorities.

Key Value

From the **Key Value** drop-down list, select the OnBase Keyword Type to associate with this chart data field.

Keyword Type mapping allows OnBase to populate chart-based and MRN-based AutoFill Keyword Sets.

Note: Only certain chart data fields can have Keyword Types mapped to them. The **Key Value** drop-down list is only available for those chart data fields.

Zero-Pad For Searching

This setting allows users to search for numbers that start with one or more zeros without typing the leading zeros.

Confidentiality Code

Select the **Confidentiality Code** setting to allow the Keyword Type specified in the **Key Value** drop-down list to be used to automatically apply confidentiality codes to documents upon indexing.

When a documents is indexed with a valid confidentiality code name in the configured keyword field, the confidentiality code is automatically applied to the document. Then, when the document is opened in the viewer, a watermark is displayed in the lower pane to indicate that the document has been deemed confidential.

Caution: If a confidentiality code is configured with an **Assigning Authority** value, the confidentiality code cannot be automatically applied to documents through indexing.

Mapping Requirements

Chart data fields must be mapped correctly to ensure the attachment of documents to charts, the ability to retrieve charts in the OnBase Client, and the validity of charts created using HL7.

See the following topics for mapping requirements:

- Keyword Mapping Requirements for Chart Attachment on page 203
- Keyword Mapping Requirements for Chart Retrieval on page 204
- Mapping Requirements for HL7 on page 205

Keyword Mapping Requirements for Chart Attachment

For documents to be added to charts in OnBase, the **Chart ID #** and **MPI** chart data fields must be mapped to a Keyword Type.

Keyword Mapping Requirements for Chart Retrieval

To allow users to retrieve charts using the OnBase Client, ensure one of the following chart data fields is mapped to a Keyword Type:

Chart Data Field	Field ID #	Additional Notes
Chart ID #	10	None
Medical Record #	7	None
MPI Number	1	None
Patient First Name	2	In the OnBase Client, the length of the **Patient First Name** field in the **Chart Search** dialog box is dictated by the length of the mapped Keyword Type. Ensure the Keyword Type length is sufficient for all possible values. Charts allow up to 40 characters for the **Patient First Name**.
Patient Last Name	3	In the OnBase Client, the length of the **Patient Last Name** field in the **Chart Search** dialog box is dictated by the length of the mapped Keyword Type. Ensure the Keyword Type length is sufficient for all possible values. Charts allow up to 100 characters for the **Patient Last Name**.
Patient SSN	5	None

Mapping Requirements for HL7

To prevent charts from being marked as needing review, ensure the following chart data fields are mapped to HL7 message fields and that valid values are provided for these fields when the chart is created through HL7.

Chart Data Field	Field ID #	Additional Notes
Chart ID #	10	None
Medical Record #	7	None
MPI Number	1	Blank MPIs are not supported in OnBase. If your system does not use MPI numbers, then map the MPI to the same HL7 field as the MRN (or another value that uniquely identifies a patient record).
Attending Physician	225	An attending physician is required only if both of the following are true: • The Medical Records Management Solution is the deficiency analysis application for the chart. • The **Ignore Attending Physician when verifying Chart Information** setting is not selected for the facility the chart belongs to. To be considered valid, the attending physician must be configured in OnBase.
Admit Type	17	An Admit Type is required only if the Medical Records Management Solution is the deficiency analysis application for the chart. To be considered valid, the Admit Type must be configured in OnBase.
Facility Name	8	A facility is required only if the Medical Records Management Solution is the deficiency analysis application for the chart. To be considered valid, the facility must be configured in OnBase.

Note: A chart's Admit Date and Discharge Date can be left blank. If the HL7 message provides a date for either of these fields, the date must be valid. Otherwise, the chart is marked as requiring review. For charts using the Medical Records Management Solution, the same requirement applies to the Date of Birth field.

Pulling Values from Repeating HL7 Fields

If an HL7 import process needs to pull a single value from a repeating HL7 field, you must update the chart data field's **HL7 Reference Field** value to use a different format.

Note: To use this format to populate Keyword Values on chart documents, you must use the HL7 Medical Records Chart import process. The format does not work for populating Keyword Values using the AutoFill Keyword Set, Advanced Document Import, or any other HL7 import process.

Consider the following example of a repeating field:

`PID|1||`**20110101^^^^HW~46010223^^^^HHMRN**`|||`

In this example, the PID.3 field is repeating, and each instance of the field is separated by a **~**.

20110101^^^^HW~46010223^^^^HHMRN

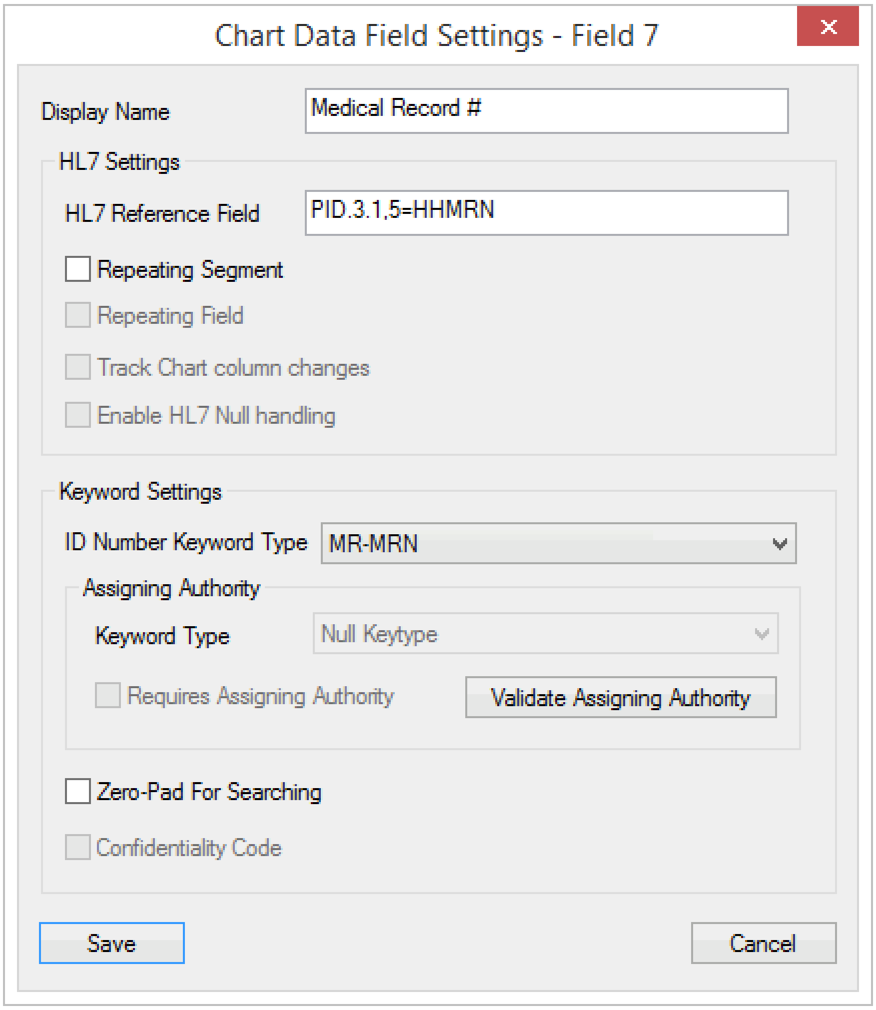
If the import process should extract **46010223** from this field, you would enter the following in the **HL7 Reference Field**:

```
PID.3.1,5=HHMRN
```

This value is composed of two parts:

- The first half of this value (**PID.3.1**) specifies the field (**PID.3**) and the component (**1**) where the import process should look for the value.
- The second half of this value (**5=HHMRN**) uses a constant (**HHMRN**) to specify which occurrence of the PID.3.1 field to use. In this example, you want to use the field where component **5** equals **HHMRN**. The field that matches this description is **46010223^^^^HHMRN**.

Once configured, the **HL7 Reference Field** in Chart Data Field Settings would resemble the following:



Using Chart Data Fields to Implement Default Values

Chart data fields provide the ability to insert default values for items whose values are not populated by HL7 messages. This configuration is appropriate for items available through the chart data fields whose value is a constant. Using chart data fields to define default values is not appropriate for items whose values might vary.

For example, if all charts to be created for a facility will have the same Facility Name, but the HL7 message used to create charts does not contain a value for Facility Name (PV1.3.4), you can use Chart Data Fields Configuration to insert a default value that will apply to all charts created.

As an example, the following procedure describes how to implement a default value for the Facility Name field.

1. From the Configuration module, select **Medical | Charts | Data Fields**.
2. Select the **Facility Name** chart data field and click **Settings**.
3. Remove the HL7 location value from the **HL7 Reference Field** and change the value to **=[Facility Name]**, where **[Facility Name]** represents the name of the facility.

   For example, **=Hyland-Westlake** would be an appropriate value for the Hyland Hospital Facility in Westlake.

Note: The name you select should be the same name as the **HL7 Field Specifier** for Medical Facility Settings.

Note: The value you enter in the Chart Data Field Settings **HL7 Reference Field** will override any value coming into the system in an HL7 message.

4. Click **Save** to exit the **Chart Data Field Settings** dialog box.
5. Click **Close** to exit the **Chart Data Fields Configuration** dialog box.

Medical System Settings Configuration

You can configure Medical System Settings to apply system-wide settings for Signature Deficiencies for Epic. These settings determine how OnBase handles chart documents and communicates with Epic.

To access Medical System Settings in the Configuration module, select **Medical | Medical System Settings**. The **Medical System Settings** dialog box is displayed.

To configure Medical System Settings, see the following sections:

- General Settings on page 210
- Deficiency Settings on page 210
- HL7 Settings on page 213

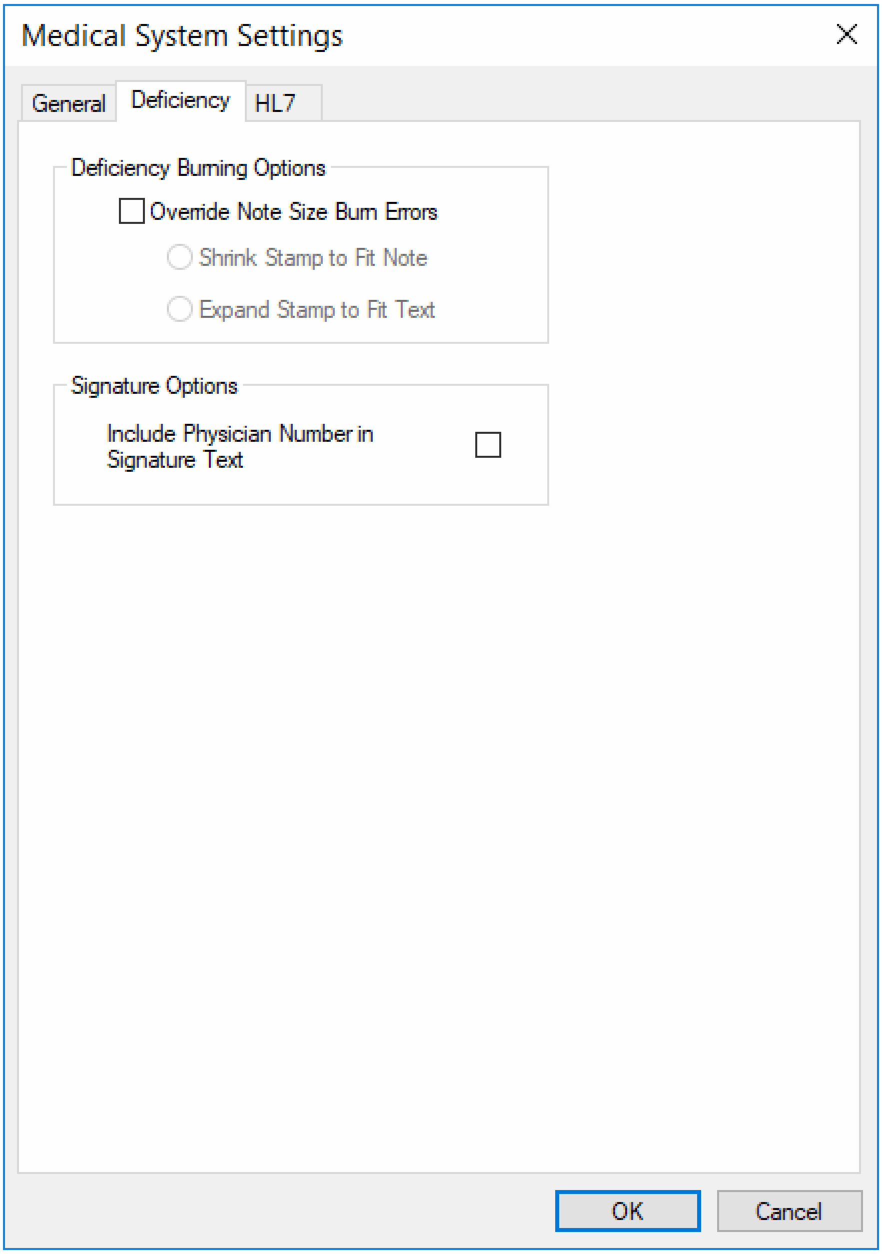
General Settings

For information about settings on the **General** tab, see the OnBase **HL7** documentation.

Deficiency Settings

Deficiency settings allow you to configure the following options:

- Override Note Size Burn Errors on page 211
- Include Physician Number in Signature Text on page 211



Override Note Size Burn Errors

By default, if a deficiency's signature text is too long for the size of the deficiency note, the -EPICANALYSIS server logs a burn error for the deficiency, and the document is not burned.

To allow these deficiencies to be burned without error, select **Override Note Size Burn Errors** and choose from one of the following options:

- Shrink Stamp to Fit Note on page 211
- Expand Stamp to Fit Text on page 211

Note: In some cases, either option may adversely affect the readability of the deficiency text or the document. Make sure you understand the potential risks when selecting either option.

Shrink Stamp to Fit Note

Select this option if the signature text's font size should be reduced to fit within the deficiency note. The -EPICANALYSIS server will then attempt to burn the deficiency.

Before selecting this option, be aware the resulting text may be too small to be clearly read.

Expand Stamp to Fit Text

Select this option if the deficiency note size should be increased to display the signature text legibly. After increasing the note size, the -EPICANALYSIS server will attempt to burn the deficiency.

Before selecting this option, be aware of the potential risks:

- If the deficiency note is positioned near the edge of a page, increasing its size may cause the note text to extend off the page.
- Depending on the document's contents, increasing the note size may cause the note to overlap text, images, or other notes on the page.

Include Physician Number in Signature Text

The **Include Physician Number in Signature Text** setting controls whether signers' signatures include their configured Physician Numbers.

If this setting is enabled, signatures will include both the configured Signature Text and the Physician Number, as shown in the following example:

Elec. Signed By
F PIERCE #F6666
on 02/02/2012 09:42

If this setting is disabled, signatures will omit the Physician Number. The only means of identifying the physician will be the configured Signature Text, as shown in the following example:

Elec. Signed By
F PIERCE
on 02/02/2012 09:42

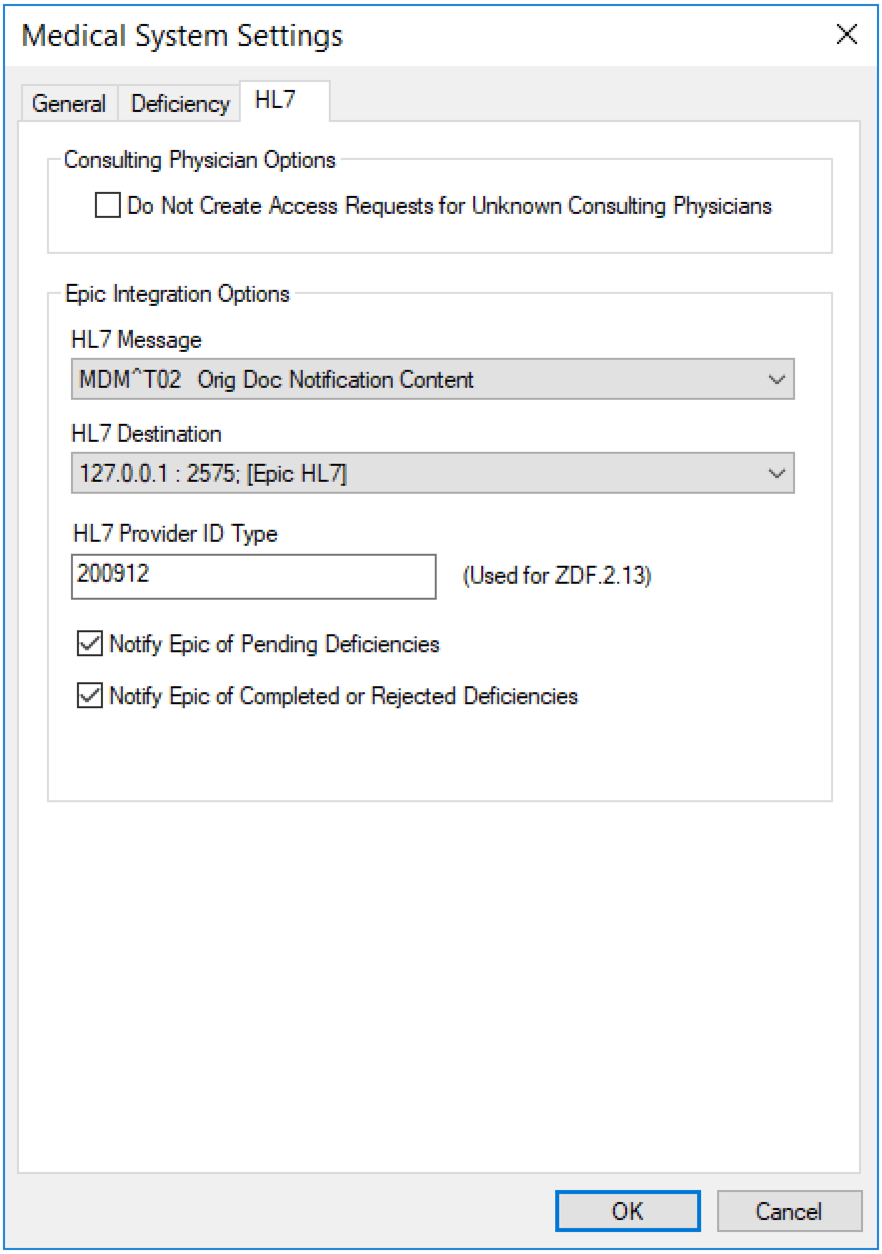
Before disabling this setting, ensure all signing physicians have Signature Text configured in Physician Information Settings.

Note: This option does not apply to physician acknowledgment stamps. For information about acknowledgment stamps, see the **Integration for Epic** module reference guide.

Note: Until burned, existing deficiencies reflect the setting in effect when the deficiencies were created or last modified. When the deficiencies are burned, they will reflect the setting in effect at the time of burning.

HL7 Settings

HL7 settings affect how the OnBase HL7 Module uses patient identification information from HL7 messages to update or create charts.



Note: For information about configuring HL7 Export Destinations and Message Templates, see the HL7 module help files or reference manual.

Do Not Create Access Requests for Unknown Consulting Physicians

This option controls whether the HL7 module automatically submits a consulting physician request when it encounters an unknown consulting physician during chart creation or chart update processing. By default, this option is not selected.

- If this option is selected, the HL7 module does not create consulting physician requests for consulting physicians that do not exist in OnBase.
- If this option is not selected, the HL7 module automatically creates a consulting physician request when an HL7 chart create/update message specifies an unknown consulting physician. An administrator can later configure the physician in OnBase and grant consulting access.

Epic Integration Options

The **Epic Integration Options** are used for notifying Epic via HL7 when a document with deficiencies is updated.

See the following sections for more information:

- HL7 Message on page 214
- HL7 Destination on page 214
- HL7 Provider ID Type on page 214
- Notify Epic of Pending Deficiencies on page 215
- Notify Epic of Completed or Rejected Deficiencies on page 215

HL7 Message

Select the HL7 message template to use to notify the Epic server that a document has been updated. The sending of this message is based on the following settings:

- **Notify Epic of Pending Deficiencies**
- **Notify Epic of Completed or Rejected Deficiencies**

HL7 Destination

Select the HL7 export destination configured for your Epic server. Destinations are displayed using the following format:

```
Network Address : Port Number; [Destination Name]
```

HL7 Provider ID Type

If necessary, type an **HL7 Provider ID Type** to specify the Provider ID value OnBase will use when sending HL7 messages to Epic. Depending on your Epic configuration, this value may be required. For information about the Provider ID Type value, see your Epic system administrator.

Notify Epic of Pending Deficiencies

Select this setting if an HL7 message should be sent to Epic whenever:

- An analyst creates a deficiency on a document.
- A physician addresses a deficiency on a document that still contains one or more pending deficiencies.

Notify Epic of Completed or Rejected Deficiencies

Select this setting if an HL7 message should be sent to Epic when all deficiencies on a document have been addressed and no pending deficiencies remain.

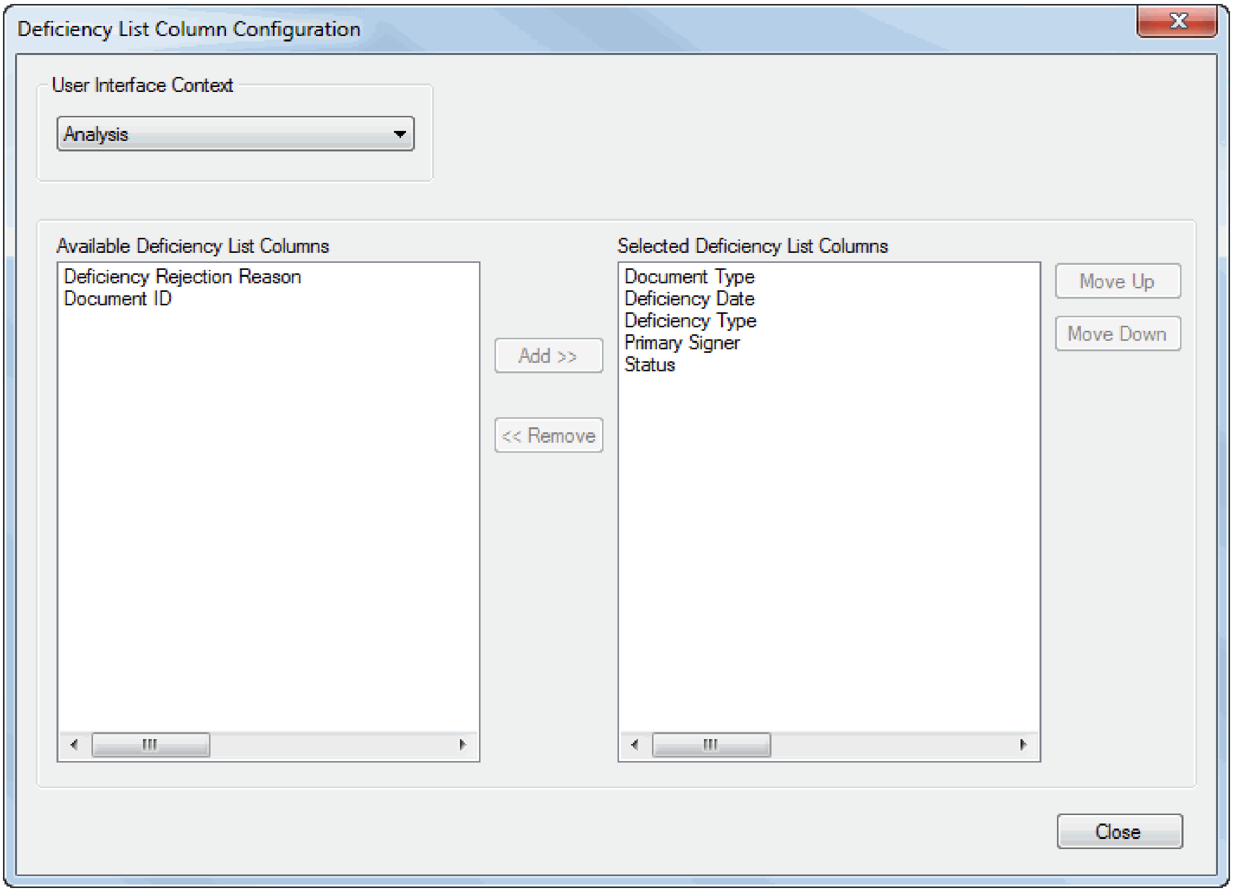
Note: This setting must be selected if deficiencies are being addressed on mobile devices using the Integration for Epic Canto and Epic Haiku.

Deficiency List Column Configuration

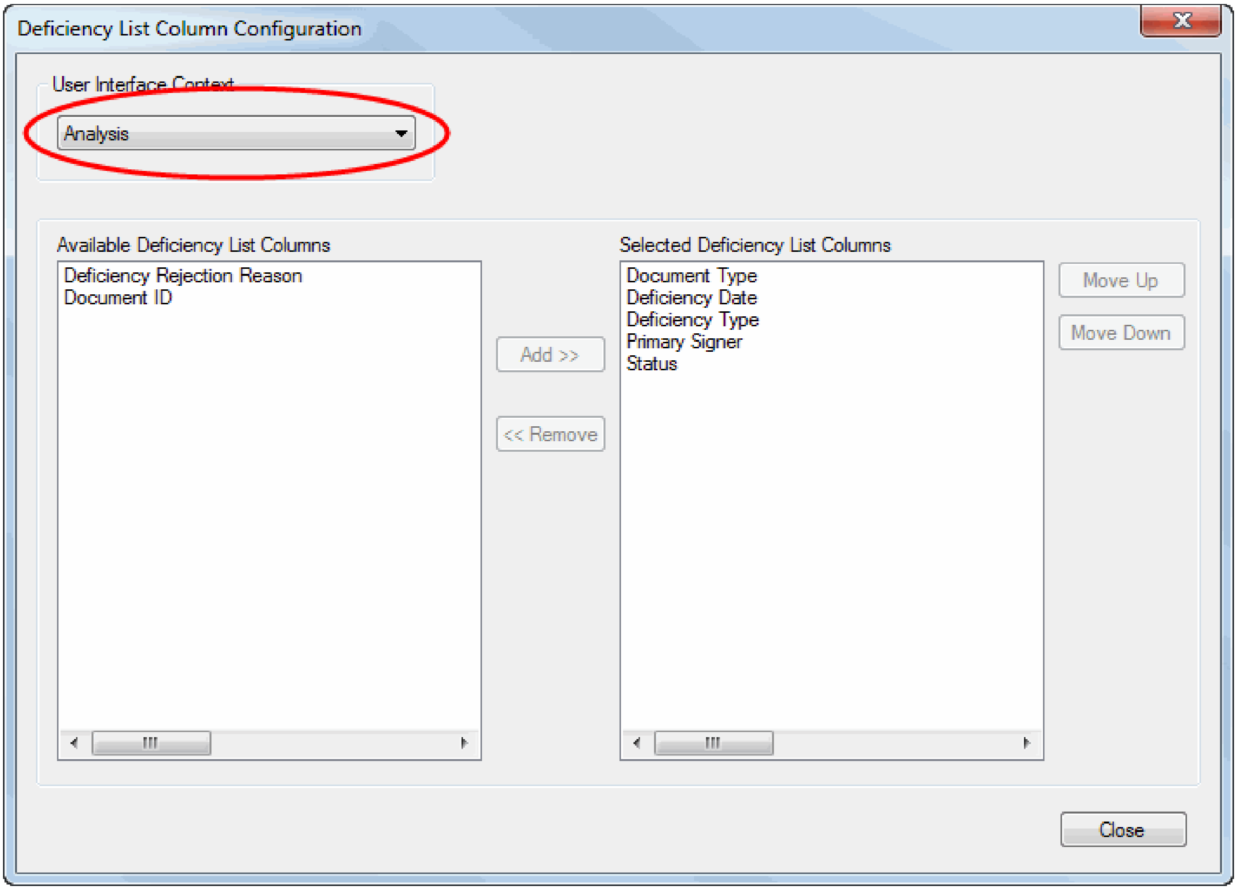
In Signature Deficiencies for Epic, the deficiency list displays deficiency information in columns. These columns and their order are configured in OnBase Configuration.

Tip: For descriptions of available columns, see Deficiency List Column Descriptions on page 219.

1. In OnBase Configuration, select **Medical | User Interface Settings | Epic | Deficiency List Columns**. The **Deficiency List Column Configuration** dialog box is displayed.



2. Under **User Interface Context**, select the context containing the deficiency list you want to configure.

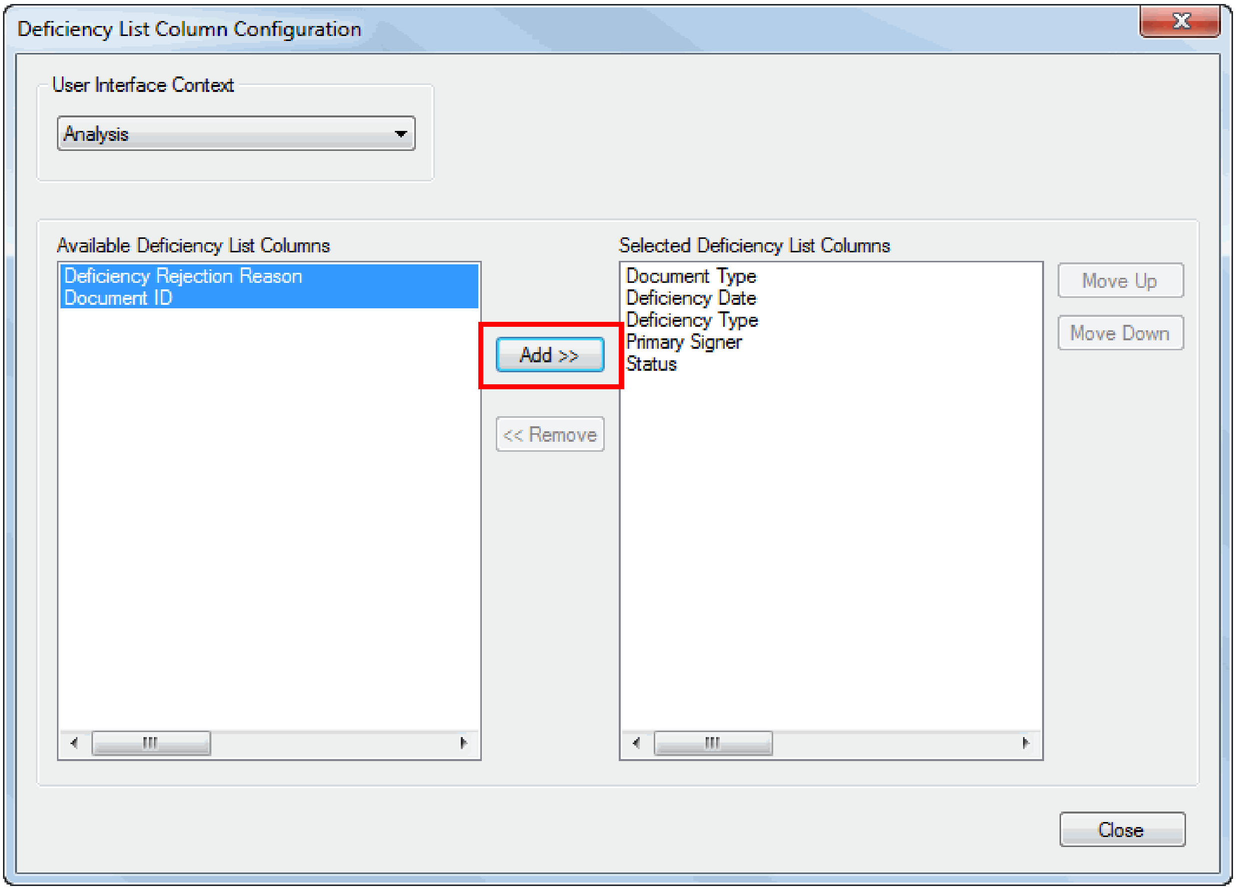


The following contexts are available:

User Interface Context	Description
Analysis	Configure columns displayed in the Deficiency List for **Analysis**.
Completion	Configure columns displayed in the Deficiency List for **Completion** when a physician is viewing his or her own deficiencies.

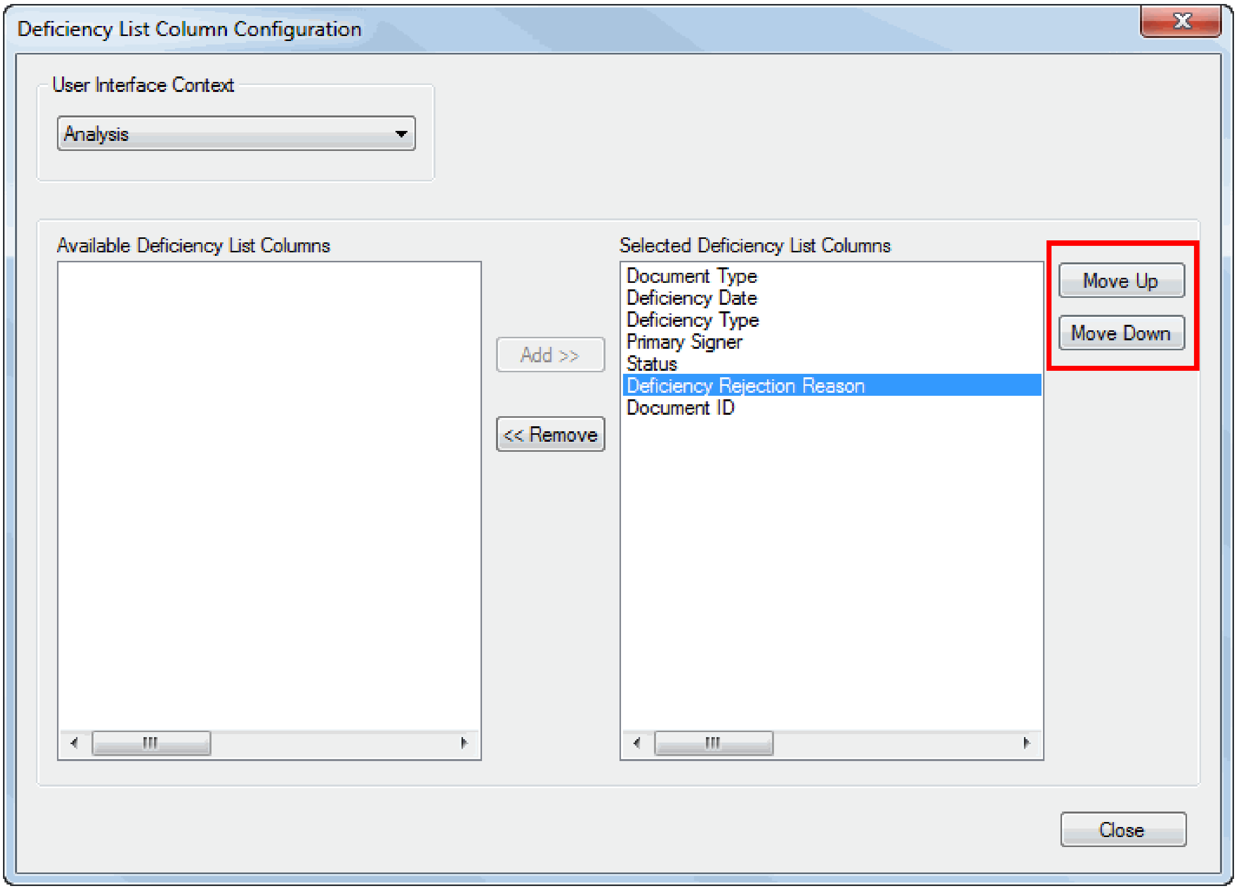
3. From the list on the left, select the columns to be displayed in the selected context. To select multiple columns, press **CTRL** as you select each one.

4. Click **Add**.



To remove a column, select it from the list on the right. Then, click **Remove**.

5. Use the **Move Up** or **Move Down** button to move the selected columns up or down.



6. When the columns are selected and displayed in the correct order, click **Close**, or return to step 2 to configure columns for another context.

Deficiency List Column Descriptions

The following table describes the columns associated with the deficiency list. The available columns vary per context.

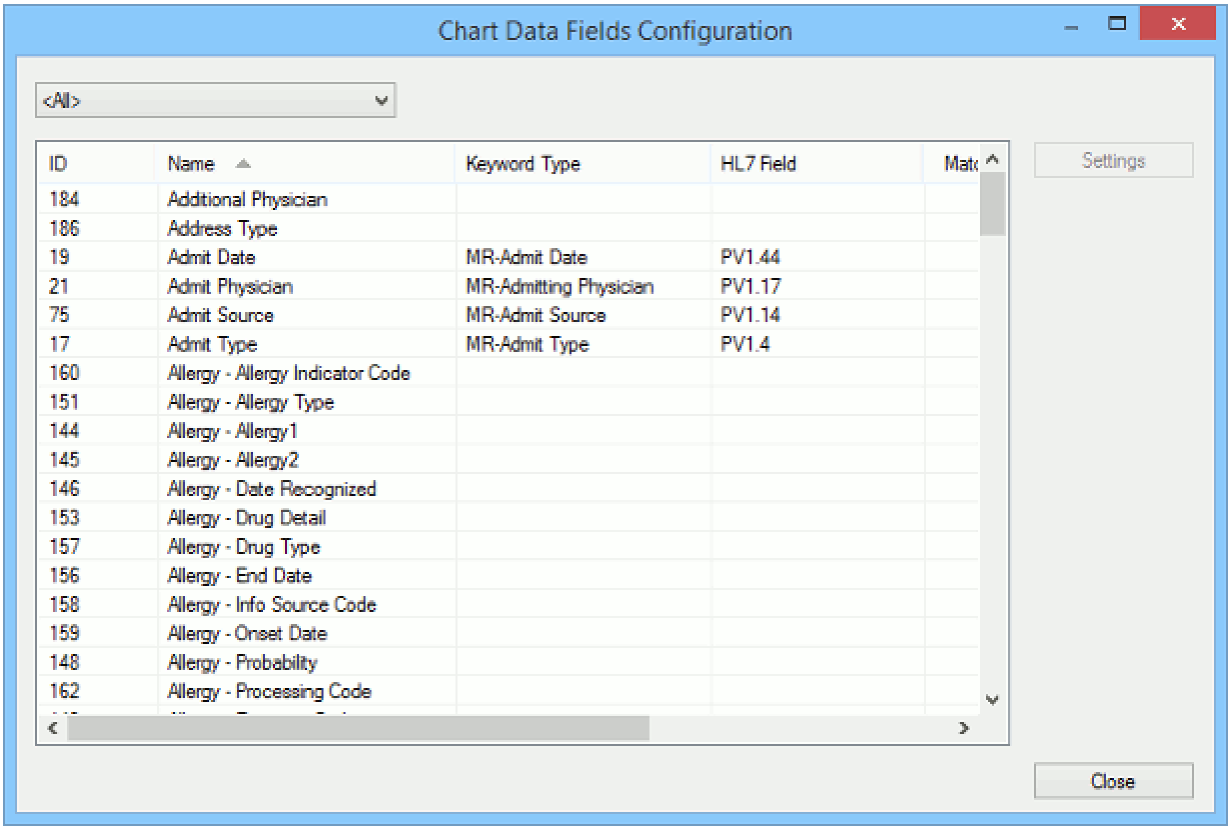
Column Name	Description
Chart ID #	The chart ID number.
Deficiency Date	The date the deficiency was placed.
Deficiency Rejection Reason	For rejected deficiencies, this column displays the rejection reason provided by the rejecting physician.
Deficiency Type	The type of deficiency.

Column Name	Description
Document ID	The internal ID number of the document associated with the deficiency.
Document Type	The Document Type of the document associated with the deficiency.
Facility Name	The name of the facility.
Patient First Name	The patient's first name.
Patient Last Name	The patient's last name.
Primary Signer	The Primary Signer associated with a deficiency.
Status	The document's status.

Demographic Information Configuration

In Signature Deficiencies for Epic, the labels displayed for patient demographic information in the Demographics pane can be customized by changing the corresponding **Chart Data Fields**. These labels are configured in OnBase Configuration.

1. In OnBase Configuration, select **Medical | Charts | Data Fields**. The **Chart Data Fields Configuration** dialog box is displayed.

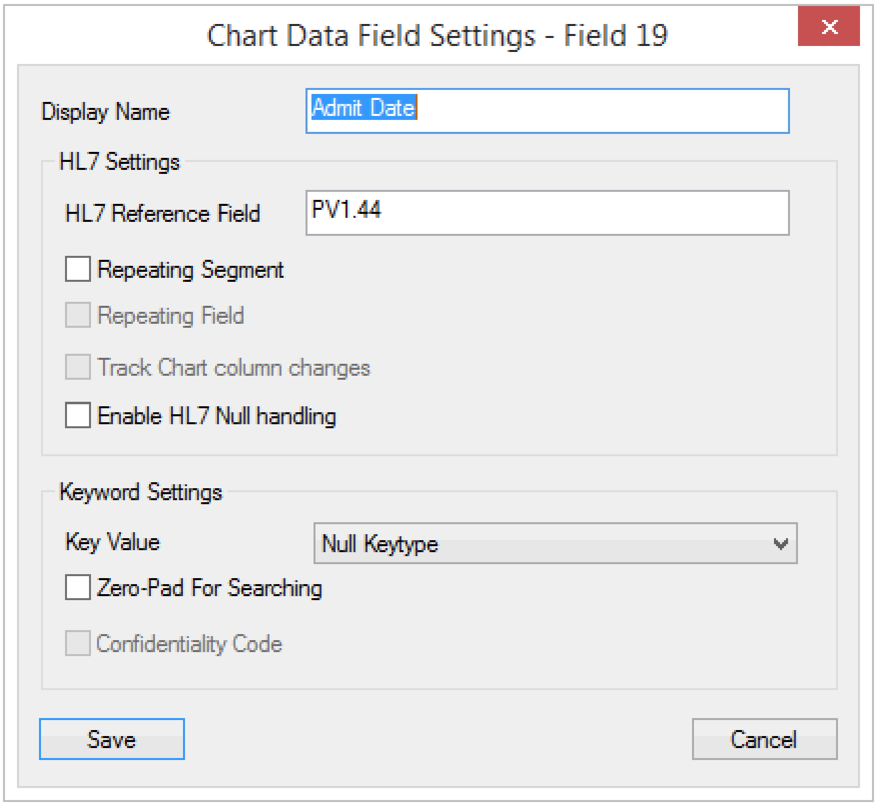


The following chart data fields correspond to labels in the Demographics pane that can be changed.

Chart Data Field	Description
Admit Date	The date the patient was admitted.
Admit Type	The type of admission.
Attend Physician	The patient’s attending physician.
Chart ID #	The chart ID number, also called the account number, episode number, or visit number.
Dept. Name	The patient’s assigned location.

Chart Data Field	Description
Discharge Date	The date the patient was discharged.
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 DOB	The patient's date of birth.
Patient Sex	The patient's gender.

2. Select an item and click **Settings**. The **Chart Data Field Settings** dialog box is displayed.
3. Change the **Display Name** field's value to change the corresponding label in the Demographics pane.



4. Click **Save**.

Document Corrections

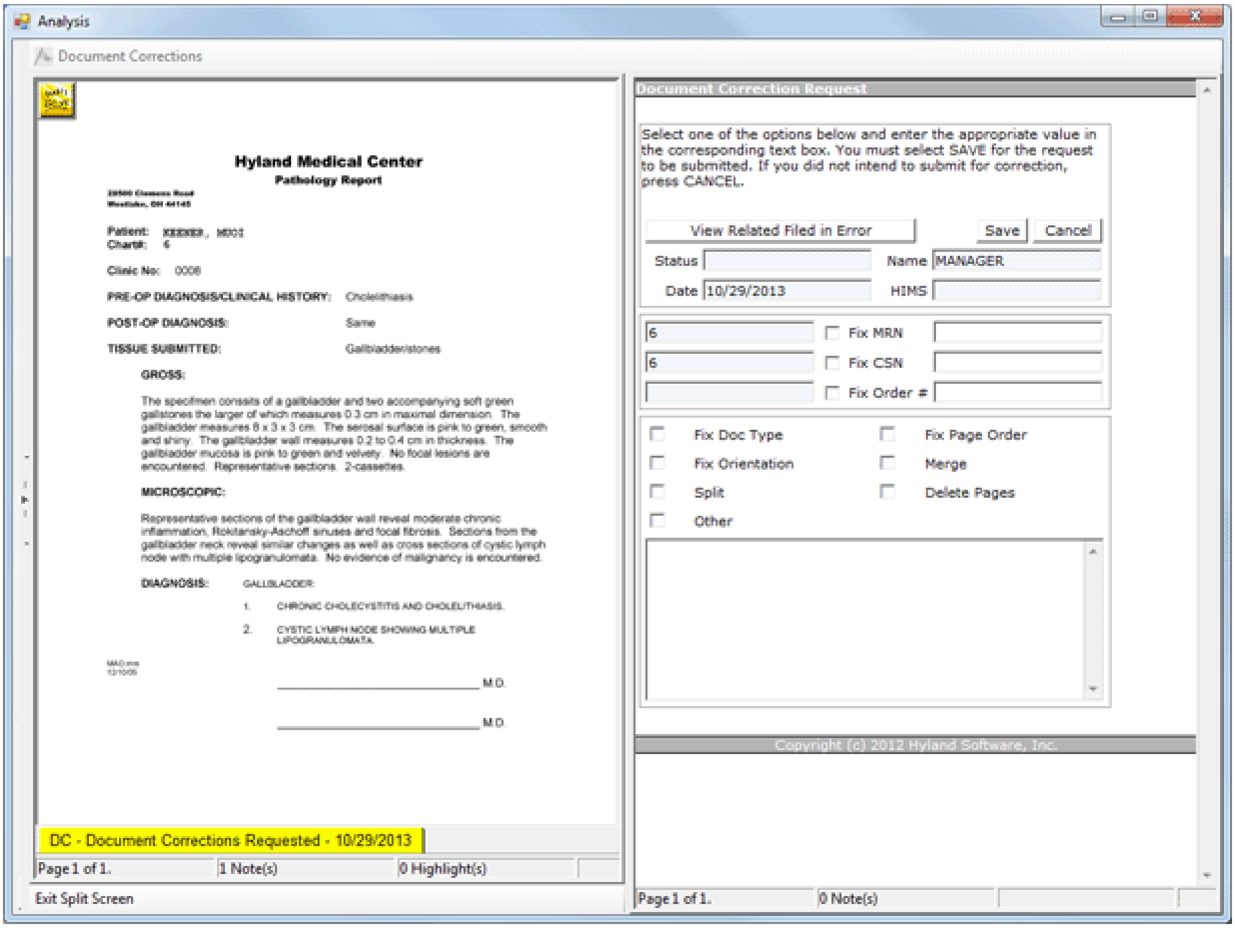
The document correction process allows analysts to send OnBase documents to OnBase Workflow from within Epic. This feature provides centralized administration for document corrections, and it can help ensure OnBase and Epic remain synchronized.

Designing a Correction Process

The following are a few examples of document correction processes. You can model your process off one or more of these examples, or you can design your own approach.

- When users submit a document for correction, display a form requesting additional information about the necessary changes. OnBase Workflow can use the values to route both the form and the submitted document to the appropriate queue.
- When users submit a document for correction, prompt them with a note requesting an explanation for the submission. The note also can serve to notify other users that the document has been submitted for correction.
- Create multiple correction actions, each one dedicated to a specific type of correction (for example, correcting the MRN, or reordering pages). Map each action to a Workflow life cycle dedicated to that type of correction.

In the following example, the Analysis window presents the user with a form requesting the correction reason. Workflow adds a note to indicate the document has been submitted.



Continue to the following topics for more information:

- Configuring Document Types for Correction Forms on page 224
- Configuring HL7 for Corrections on page 226
- Configuring Life Cycles for Corrections on page 226
- Creating the Healthcare Document Correction Action on page 226

Configuring Document Types for Correction Forms

When an analyst submits a document for correction, the Analysis window can automatically display an E-Form to prompt the analyst for more information. If your solution will be driven using an E-Form, make sure the form template and Document Type are properly configured.

See the following topics:

- E-Form Template Configuration on page 225
- Document Type Settings on page 225

E-Form Template Configuration

Note: Do not use OnBase Unity Forms for the document correction process. Because Unity Forms are read-only when displayed within the Signature Deficiencies for Epic, users will not be able to edit them.

To configure the E-Form template, see the **E-Forms** module reference guide or help files. When finished, import the template into the **SYS HTML Forms** Document Type.

Be sure the form template asks users to specify the reason for submitting the document. For example, the template may provide check boxes for indicating the following issues:

- Incorrect patient
- Incorrect encounter
- Incorrect order number
- Pages out of order

The template may also include a **Comments** field to capture additional information.

Document Type Settings

The following table outlines the required configuration settings for the correction request form's Document Type. For more information about Document Type configuration, see the **System Administration** module reference guide.

Document Type Configuration	Description
Settings	Set the **Default File Format** to **Electronic Form**.
Keyword Types	Ensure the **Document Handle** Keyword Type is assigned. OnBase Workflow can use this Keyword Type to link the request form to the submitted document. The **Document Handle** Keyword Type also must be assigned to the Document Types of documents that may be submitted for corrections. **Note:** Ensure the **Document Handle** Keyword Type (#19) is named **Document Handle**. If this Keyword Type has a different name, the document corrections process will not work.
User Group	Assign document privileges (Retrieve/View, Create, Modify) to users who need the ability to create and submit the form. Also assign rights to users who should be allowed to access the forms through standard document retrieval in one of the OnBase clients.
E-Form	Select the form template you imported into the **SYS HTML Forms** Document Type.

Configuring HL7 for Corrections

OnBase can send HL7 messages to notify Epic when a document is created, updated, or deleted. Make sure Workflow and the OnBase HL7 Module are configured to generate and send these messages to the appropriate export destinations for Epic.

Note: Different Epic solutions may require different values to be present in document notification HL7 messages. Work with your Epic administration team to determine which message types, document values, and properties must be sent.

Configuring Life Cycles for Corrections

To use the document correction process, you must configure at least one Workflow life cycle to receive and route submitted documents.

Correction actions send documents to the initial queue of the target life cycle. If additional routing is needed, configure system work for the initial queue to route documents to other queues.

For detailed information about configuring OnBase Workflow, see the **Workflow** module reference guide.

If you are using a form to submit correction requests, also do the following:

1. Configure the initial queue of the life cycle to create the correction request form using the **Create New Form** action type.
2. Enable the **Fill Document Handle Keyword(s)** option for the **Create New Form** action.

   For this setting to work, the **Document Handle** Keyword Type must be assigned to the Document Types of both the document submitted for correction and the correction request form.
3. Create a work folder to display the related document based on the **Document Handle** Keyword Type.

   Depending on the design of your solution, the related document may be either the document submitted for correction or the correction request form.

Creating the Healthcare Document Correction Action

To allow users to submit documents for correction, you must configure a correction action to send documents to the appropriate Workflow life cycle. Healthcare document correction actions can be accessed through the following applications:

- The OnBase Patient Window
- The OnBase Integration for Epic Viewer
- The Signature Deficiencies for Epic Analysis window

- The OnBase Web Server (using DocPop Document Correction)

Note: The ability to display a form for additional input is not available in DocPop Document Correction.

Before you begin, configure the necessary life cycles and queues in OnBase Studio.

Note: Users do not need privileges to an action's life cycle or queue to be able to execute the action; users only need privileges to the action, as described later in this topic. Similarly, actions can send documents from any Document Type to a life cycle; Document Types do not have to be assigned to the life cycle.

Continue to the following topics:

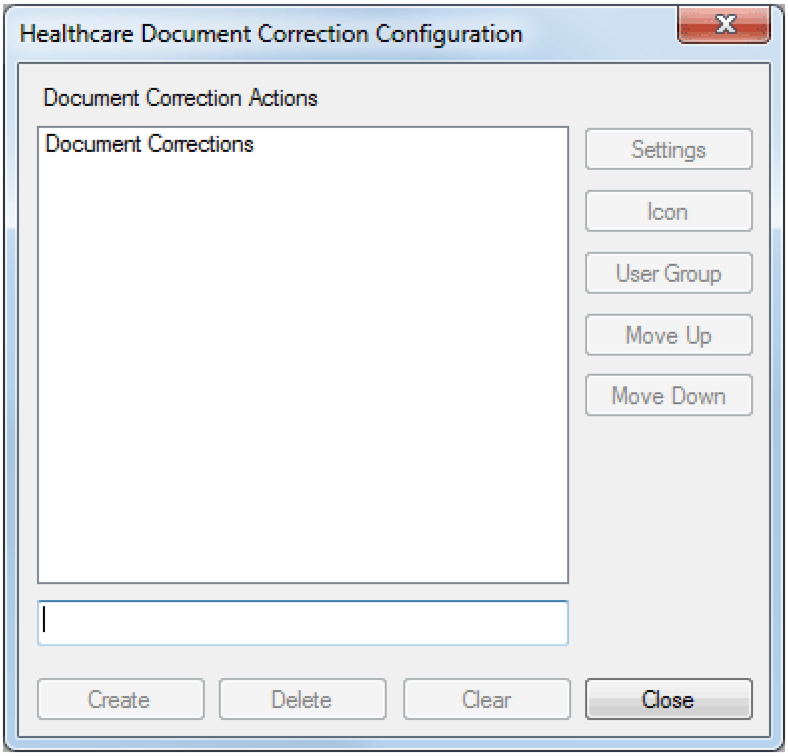
- Creating an Action on page 227
- Assigning an Icon on page 229
- Assigning User Group Privileges on page 231
- Re-ordering Actions on page 231

Creating an Action

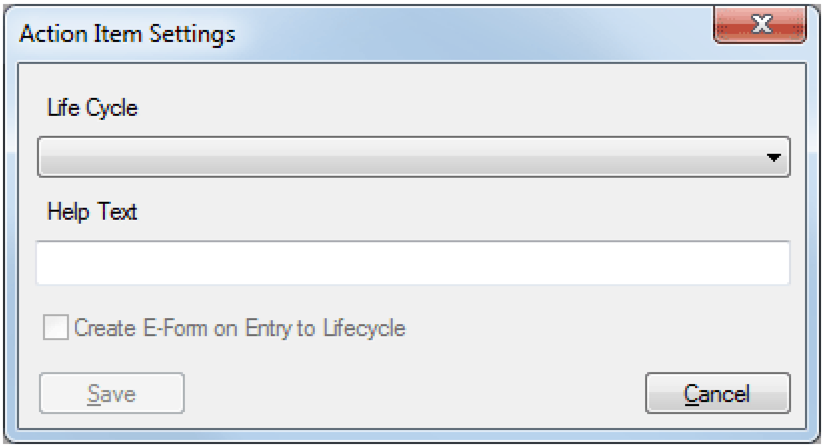
Complete the following steps to create the document correction action. If the action should present users with an E-Form, do the following:

- Make sure the action is assigned to the life cycle that creates the request form.
- Make sure **Create E-Form on Entry to Lifecycle** is selected in the action's settings.

1. In OnBase Configuration, select **Medical | Healthcare Document Correction**. The **Healthcare Document Correction Configuration** dialog box is displayed.



2. In the field provided, type the name for an action.
3. Click **Create** to add the action to the list.
4. Click **Settings**. The **Action Item Settings** dialog box is displayed.



5. From the **Life Cycle** drop-down list, select the life cycle where documents should be routed initially.

6. In the **Help Text** field, type the tool tip to display when a user places the mouse pointer over the button.
7. Select **Create E-Form on Entry to Lifecycle** if both of the following are true:
   - The selected **Life Cycle** is set up to create a form when a document is submitted.
   - The form should be automatically displayed to users who submit documents using the OnBase Patient Window, the Integration for Epic Viewer, the Integration for Epic Web Viewer, or the Signature Deficiencies for Epic Analysis window. The form allows users to provide additional information about the requested corrections.

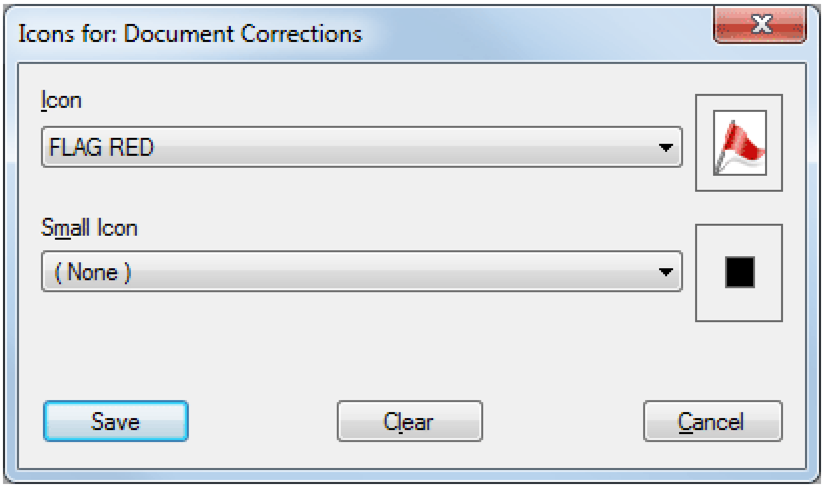
Note: Forms are not displayed when documents are submitted for correction through DocPop Document Correction.

8. Click **Save**.
9. Continue to the following tasks:
   - Assigning an Icon on page 229
   - Assigning User Group Privileges on page 231
   - Re-ordering Actions on page 231

Assigning an Icon

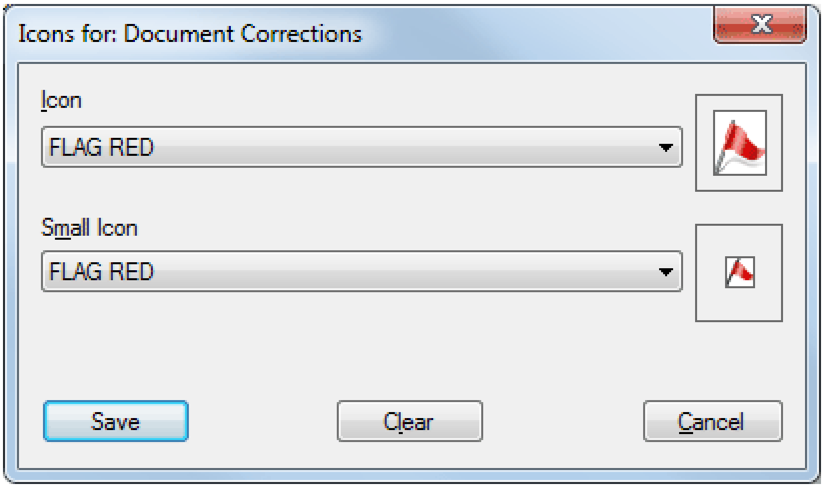
Follow these steps to assign an icon that will be displayed on the document correction button.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **Icon**. The **Icons for** dialog box is displayed.
3. From the **Icon** drop-down list, select the icon to be displayed for the action in the OnBase Patient Window or the DocPop Document Correction viewer.



The **Icon** is used only by the OnBase Patient Window and the DocPop Document Correction viewer. This setting is not required for Signature Deficiencies for Epic.

4. From the **Small Icon** drop-down list, select the icon to be displayed on the action button in the Analysis window.

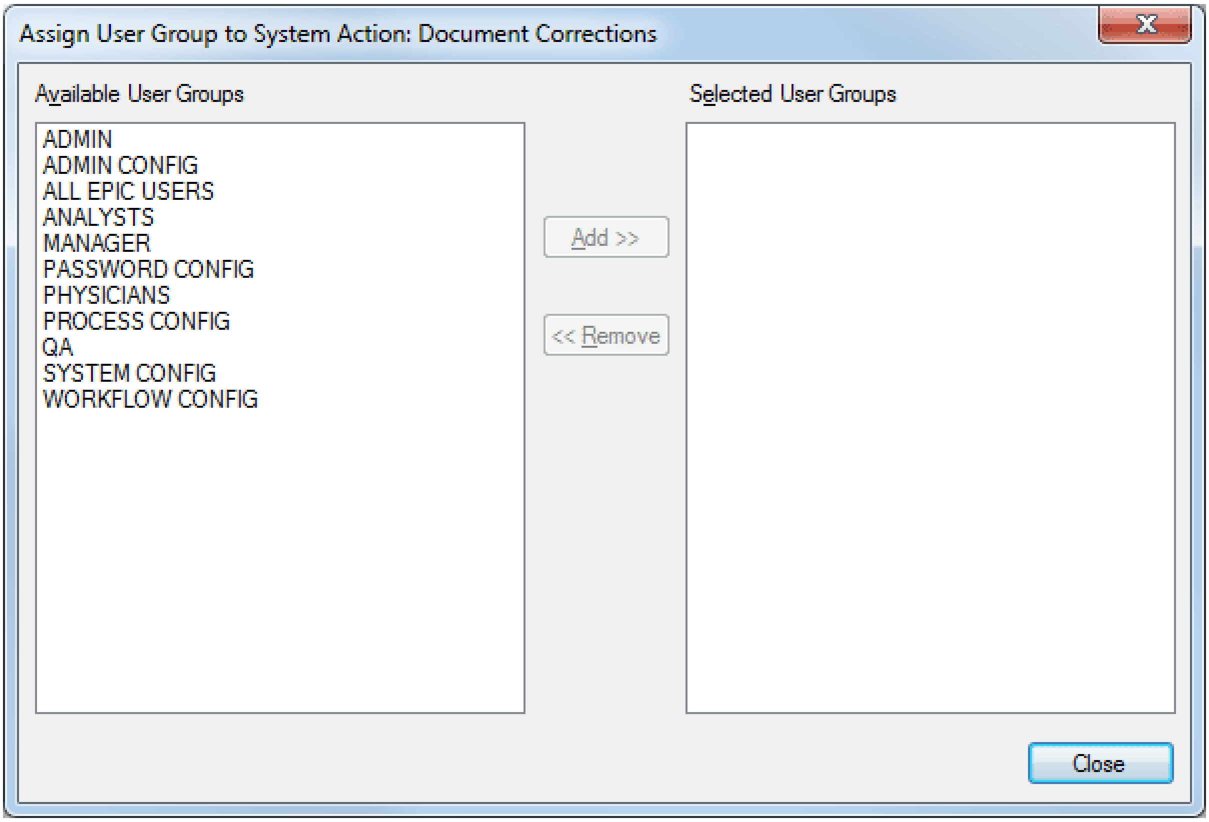


5. Click **Save**.
6. Continue to the following tasks:
   - Assigning User Group Privileges on page 231
   - Re-ordering Actions on page 231

Assigning User Group Privileges

To access an action, a user must belong to a User Group assigned to the action. Users do not need privileges to an action's life cycle or queue to be able to execute the action.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **User Group**. The **Assign User Group to System Action** dialog box is displayed.



3. Select the User Groups who need to see and use the action. To select multiple groups, press **CTRL** as you select each group.
4. Click **Add**.
5. Click **Close** when finished.
6. Continue to Re-ordering Actions.

Re-ordering Actions

Follow these steps to change the order in which buttons are displayed above the viewer.

1. Select an action from the **Healthcare Document Correction Configuration** dialog box.
2. Click **Move Up** or **Move Down**.
3. Repeat for each action as needed.

Application Settings Configuration

Signature Deficiencies for Epic offers several configuration options for the Analysis and Signing windows. These options are available in the Signature Deficiencies for Epic configuration file. To access the file, perform the steps under Accessing the SD4E.txt Configuration File on page 232.

See the following topics to configure the Analysis and Signing windows as needed:

- Filtering the Physician List by Facility on page 233
- Caching Available Physicians on page 233
- Sorting Physicians in the Analysis Window on page 234
- Enabling the “Other” Decline Reason on page 234
- Customizing Available Decline Reasons on page 235
- Auto-Closing the Physician Signing Window on page 236

Accessing the SD4E.txt Configuration File

1. To modify configuration settings for the Analysis or Signing window, navigate to the location of the Signature Deficiencies for Epic configuration file.

   The file’s location is specified as a value in the OnBase Application Server’s Web.config file. In Web.config, under **appSettings**, locate the setting named **SD4EConfigLocation**. The value for this setting is the full path to the SD4E.txt configuration file.
2. Open the SD4E.txt configuration file.
3. Add or modify settings as needed, using the following format: `setting : value`

   The setting and value must be separated by a colon, as shown in the following example. The space on either side of the colon is optional.

```
cacheLocation : c:\integrations\Epic\cacheFiles
cachePhysicianTime : 2
chartAssigningAuthority : HIM
closeAfterLastDeficiency : false
declineOtherAvailable : false
dumpContextInformation : false
dumpDeficiencyInformation : false
filterPhysiciansByFacility : true
physicianSort : physnumberalpha
rejectionReason1 : Incomplete chart
rejectionReason2 : hidden
```

4. Save the file.

Filtering the Physician List by Facility

By default, the Analysis window lists all physicians available in OnBase. This can make deficiency assignment difficult in systems that contain a very large number of physicians. To address this issue, Signature Deficiencies for Epic can filter the **Physician** list to display only physicians who practice at the current chart's facility.

To filter the physician list by facility, add the **filterPhysiciansByFacility** setting to a new line in the SD4E.txt configuration file. Set the value to **true** to filter the **Physician** list. Set the value to **false** if the **Physician** list should include all physicians in the system.

Caching Available Physicians

By default, each time a user accesses Signature Deficiencies for Epic, the application retrieves the physicians currently available in OnBase. If your system contains a large number of physicians, there may be a delay while this process takes place. If the delay is too long, you might improve load time by enabling physician caching. This configuration allows available physicians to be temporarily cached to the client workstation.

To enable caching, add the **cachePhysicianTime** setting to a new line in the SD4E.txt configuration file. Set the value the number of minutes physicians should remain cached on the client workstation. For example, the following setting would cache physicians for 60 minutes:

```
cachePhysicianTime : 60
```

During the cache interval, the physician list in the Analysis window will be populated only with the physicians currently cached to the client workstation. When the interval expires, Signature Deficiencies for Epic will again retrieve the available physicians from OnBase and cache them to the workstation.

If the **cachePhysicianTime** setting is not configured, the physicians are not cached. Each time it is accessed, Signature Deficiencies for Epic will load the available physicians from OnBase.

Note: Once the physician list is cached, Signature Deficiencies for Epic will not check whether physicians have been added or deactivated until the cache interval expires. When choosing a cache interval, consider the frequency with which physicians are created or deactivated in your system.

Note: By default, once the physician list is cached, the cache interval cannot be reset for all users at a global level. Recycling the Application Server's application pool does not reset the cache interval. To clear the cache for an individual user, delete the user's **physicianCache.xml** file (for analysts) or **physicianCacheSigning.xml** file (for physicians). By default, this file is found in the following location on the user's workstation: C:\Users\<username>\AppData\Local\IsolatedStorage\<variable>\<variable>\Url.<variable>\AssemFiles\. To change the cache location, see the following topic.

Changing the Physician Cache Location

In a Citrix environment, you may want to cache the physician list to a network location accessible by all Citrix servers across multiple user sessions. To change the cache file location, add the **cacheLocation** setting to the Signature Deficiencies for Epic configuration file. For example, the following would cause the files to be stored in \\citrix-app1\cache:

```
cacheLocation : \\citrix-app1\cache
```

With this configuration, the cache files can be shared by multiple Citrix servers and multiple users.

If the **cacheLocation** setting is not specified, cache files are stored in their default location on the local workstation:
C:\Users\<username>\AppData\Local\IsolatedStorage\<variable>\<variable>\Url.<variable>\AssemFiles\

Sorting Physicians in the Analysis Window

By default, the Analysis window lists physicians alphabetically by full name. You can change this behavior so physicians are ordered by their signature text or their Physician Numbers.

This behavior is controlled by the **physicianSort** setting in the SD4E.txt configuration file. Change this setting to one of the following values:

- **signaturename**—This setting orders physicians' names alphabetically by physician signature, which is configured in the **Signature Text** field of the **Physician Information Settings** dialog box.
- **physnumbernumeric**—This setting orders physicians' names numerically by Physician Number, which is configured in the **Physician Number** field of the **Physician Information Settings** dialog box. This setting will not work if Physician Numbers are alphanumeric.
- **physnumberalpha**—This setting orders physicians' names alphabetically by Physician Number. If Physician Numbers begin with a numeric character, they are still sorted alphabetically (where 100 precedes 11, which precedes 2).

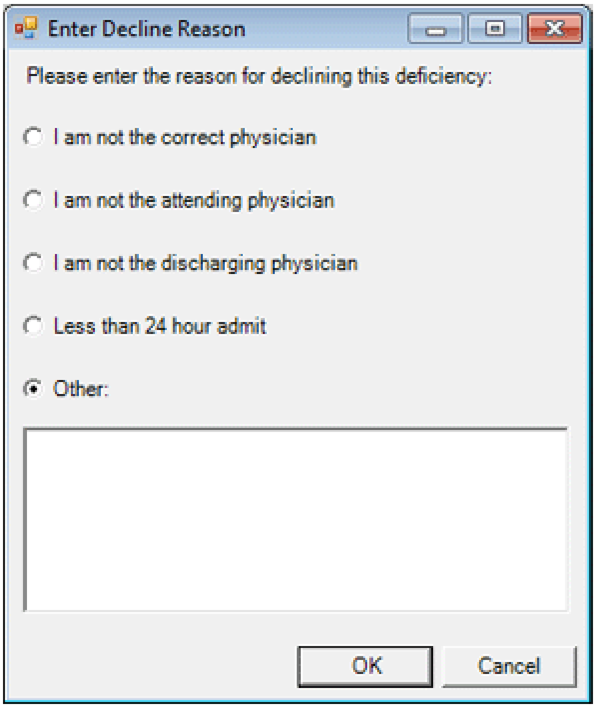
If the **physicianSort** setting does not exist, or if it contains an invalid value, names will be sorted alphabetically by full name.

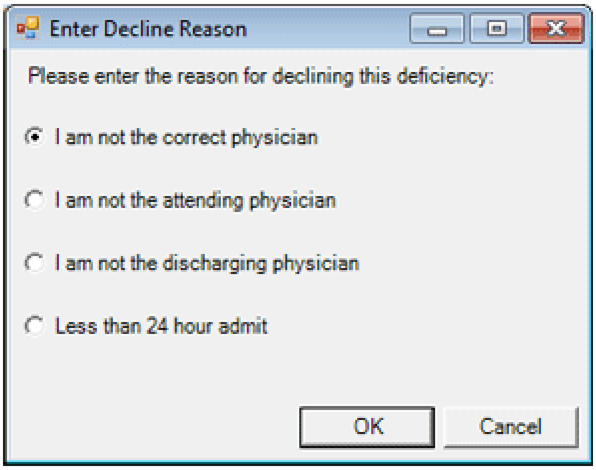
Enabling the "Other" Decline Reason

Physicians who decline a deficiency must provide a decline reason. When physicians click **Decline** from the Signing window, they are presented with a list of possible rejection reasons.

To allow physicians to specify their own reasons, you must modify the **declineOtherAvailable** configuration setting. When this setting is set to **true**, physicians can select **Other** and type their rejection reason in the field provided. Set this setting to **false** to require physicians to choose from the list of decline reasons provided. If the **declineOtherAvailable** setting is missing from the SD4E.txt configuration file, then the **Other** option is unavailable.

See the illustration below for a comparison of the **Enter Decline Reason** dialog box when the **Other** option is available and unavailable.





Customizing Available Decline Reasons

When a physician declines a deficiency, the **Enter Decline Reason** dialog box is displayed, providing several decline reasons for the physician to choose from. By default, the following reasons are available:

- I am not the correct physician.
- I am not the attending physician.
- I am not the discharging physician.
- Less than 24 hour admit.

You can customize the **Enter Decline Reason** dialog box by hiding available options or replacing them with others that are relevant to your medical system.

Note: Try to limit custom rejection reasons to 80 characters or fewer. Rejection reasons that exceed 80 characters may be truncated.

To customize available options, add the following settings to the SD4E.txt configuration file. The number in each setting's name corresponds to an option's order in the **Enter Decline Reason** dialog box. Up to four rejection reasons are allowed.

- **rejectionReason1:** Type a new option to replace the **I am not the correct physician** option. Or, type **hidden** to hide the first option.
- **rejectionReason2:** Type a new option to replace the **I am not the attending physician** option. Or, type **hidden** to hide the second option.

- **rejectionReason3:** Type a new option to replace the **I am not the discharging physician** option. Or, type **hidden** to hide the third option.
- **rejectionReason4:** Type a new option to replace the **Less than 24 hour admit** option. Or, type **hidden** to hide the fourth option.

Auto-Closing the Physician Signing Window

You can configure the Signing window to close automatically after a physician signs his or her last deficiency on a document. By default, the window remains open after the last deficiency is completed, and physicians must close the window manually. By configuring the Signing window to close automatically, you can remove a step from the signing process and allow physicians to work more efficiently.

Set the **closeAfterLastDeficiency** setting to **true** to have the Signing window close automatically. Set it to **false** to keep the window open until the physician closes it.

Deleting Medical Record Configurations from OnBase

Because deleting medical record configurations can adversely affect your system, you may need to satisfy additional criteria, like password confirmation, before being allowed to delete a configuration item.

Items configured in the following places can be deleted as necessary:

- Delinquency Letters
- Nursing Stations
- Patient Data Access Request Reasons
- Print Templates

Password Confirmation Required

Items configured in the following places can be deleted when a confirmation password is provided. Contact Technical Support for the password if you need to delete any of these items.

- Coding Queues
- Coding Life Cycles
- External Integrations
- External Integration Queries
- Provider Specialties

Password Confirmation and -MRMSINSTALL Switch Required

The following medical system components require special configuration privileges and the -MRMSINSTALL command line switch in order to be able to delete configured items:

- Admit Types
- Clinical Document Tabs (Facility and Cross-Facility Level)
- Departments
- Facilities
- Non-Physician Groups
- Payors
- Physician Information (for deleting a physician or assigning a different user account to an existing physician)
- Physician Medical Groups
- Service Codes
- Units

In addition, a password is required. Deleting items used by existing charts can adversely affect your system. Contact Technical Support if you need to delete any of these items. See the Installation information for details on the -MRMSINSTALL command line switch and its functions.

Working with Charts

The following topics describe how to retrieve and manage medical record charts in the OnBase Client. Your ability to perform these tasks depends on your user rights and privileges. Administrative tasks require administrative privileges.

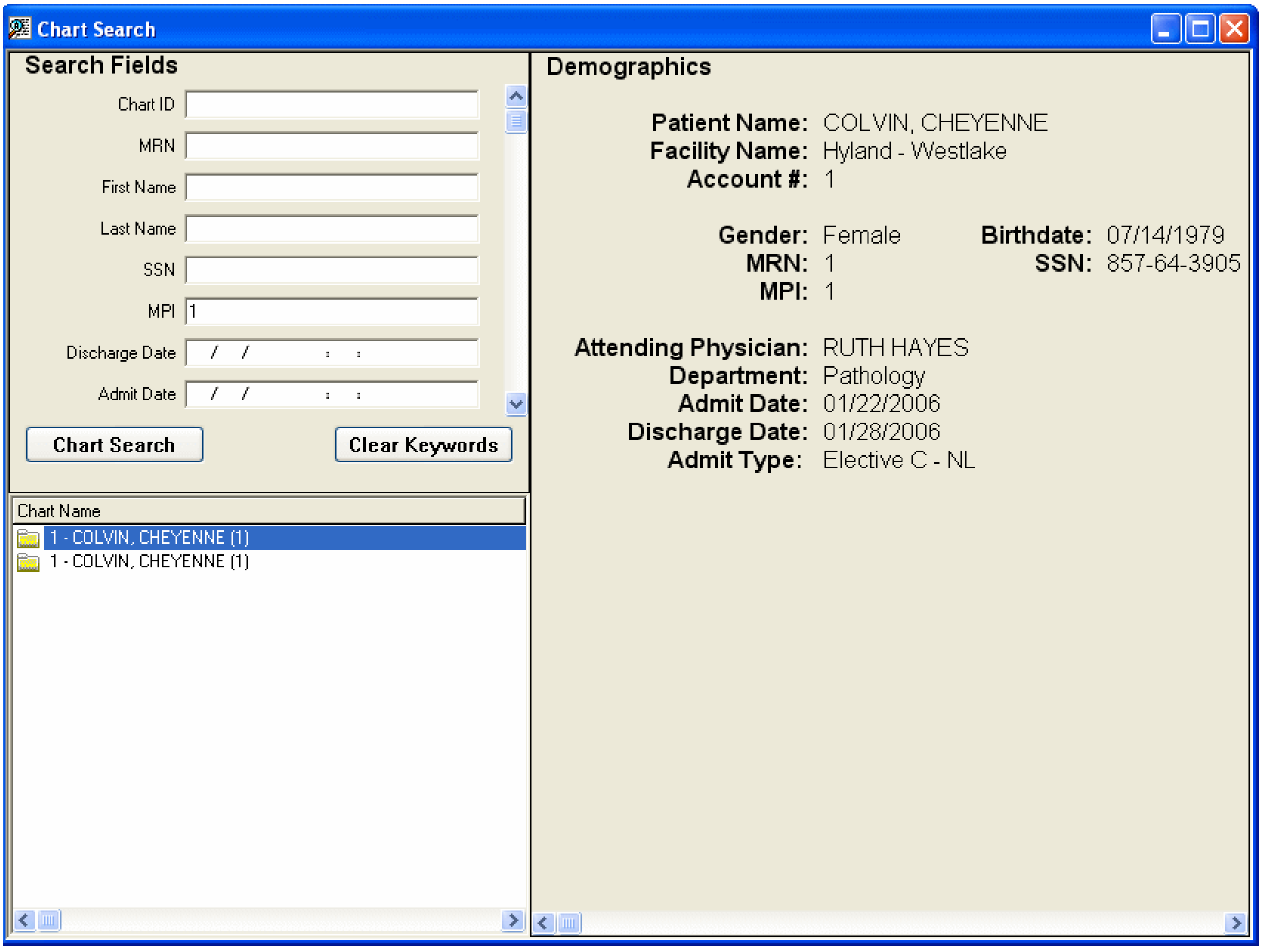
Click one of the following links to quickly navigate to that topic:

- Searching for and Viewing Charts on page 239
- Assigning Chartless Documents to Charts on page 241
- Reviewing and Correcting Charts on page 248
- Modifying Charts on page 247
- Rules for Automatically Attaching Documents to s & Charts on page 265
- Running a Script on a Chart on page 253
- Re-Indexing Considerations for Medical Records on page 266
- Deleting Empty Charts on page 255
- Scanning Medical Documents on page 256
- Indexing Medical Documents Using MPI Lookup on page 258

Searching for and Viewing Charts

You must have the appropriate Chart Search privileges in order to perform a Chart Search. See your system administrator for more information regarding Privileges.

1. From the OnBase Client, select **Medical | Chart Search**. The **Chart Search** dialog box is displayed.

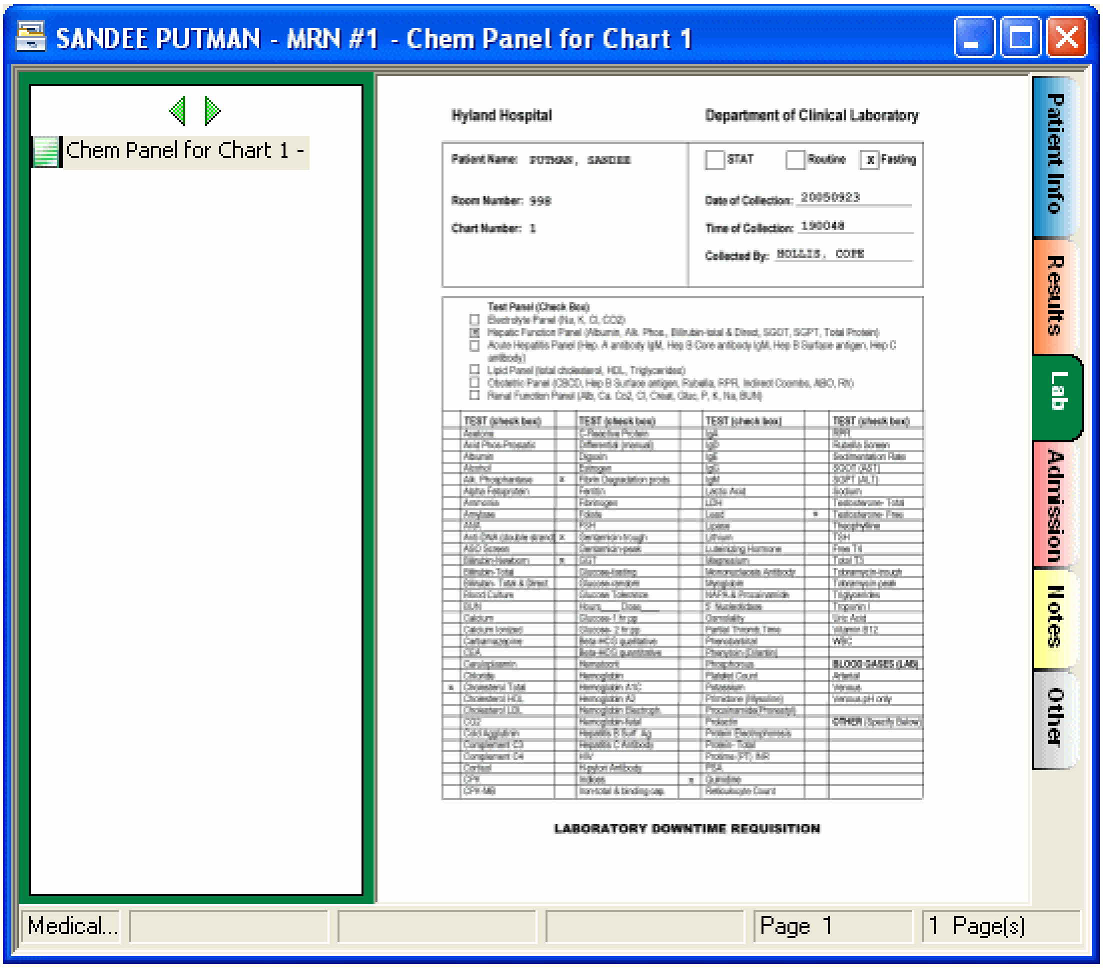


2. Type your search criteria in one or more **Search Fields**. You must provide at least one of the following values to search by: MPI, MRN, account/encounter number, first name, or last name.

Note: Wildcard characters, such as * and **?** cannot be used in the **Facility** field.

3. Charts meeting the search criteria display in the **Chart Name** list in the bottom left of the screen.
4. Select a chart to display its demographics information in the right pane.

5. Double-click the chart to open it. The chart is displayed.



6. Use the **Previous Page** and **Next Page** buttons to scroll from one document to the next in the chart. When you reach the last document in the current tab, clicking **Next Page** displays the first document in the next tab.

The background color of the documents pane corresponds to the current tab.

Assigning Chartless Documents to Charts

Typically, documents in chart **Document Types** are assigned to a chart at the time of import. At times, you may have to manually assign documents to a chart if, for example, a chart's documents are imported before the chart is created.

Manual assignment may also be necessary if the **Keyword Values** on imported documents do not satisfy the criteria necessary to automatically assign the documents to their proper chart. When you assign a chartless document to a chart, the **Keyword Values** of the document are updated with the information from the chart provided the **Keyword Types** are mapped to chart data fields in OnBase Configuration.

The following topics describe how to use the OnBase Client to assign documents to their proper chart:

- Manually Assigning Chartless Documents to a Chart on page 241
- Searching Using Keyword Types on page 243
- Processing Chartless Documents on page 245

Manually Assigning Chartless Documents to a Chart

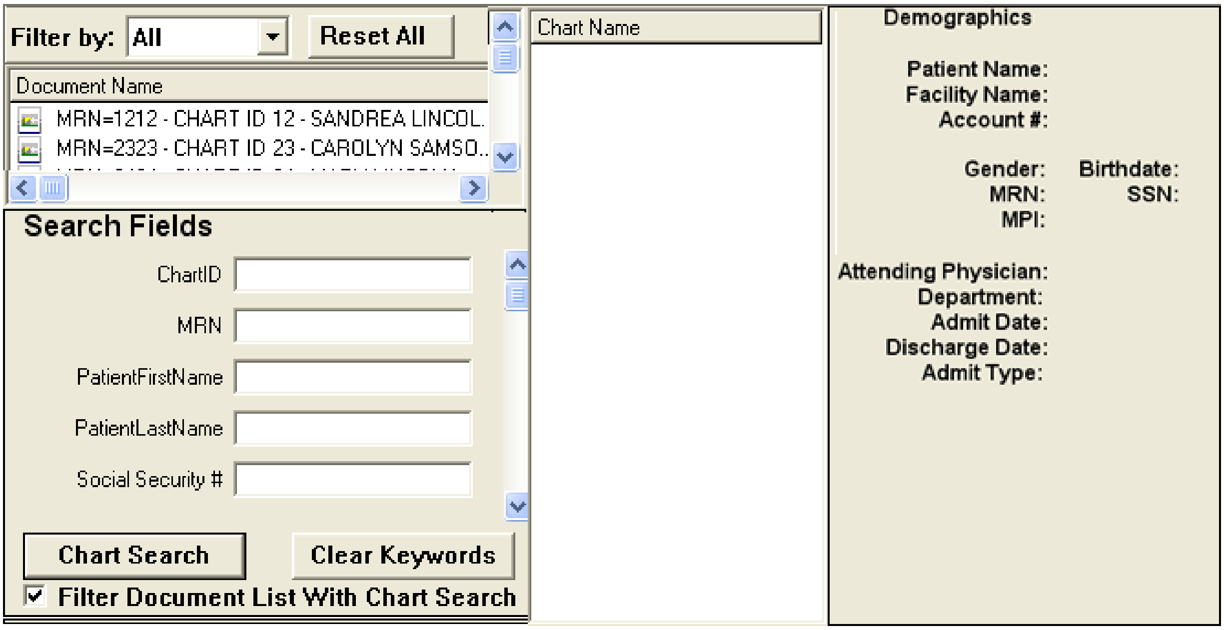
You can locate a chart by doing either of the following:

- Entering search criteria.
- Searching by chart **Account Number**.

To manually assign a chartless document to the proper chart:

1. From the OnBase Client, select **Medical | Assign Chartless Documents**. The **Assign Chartless Documents** window is displayed. The **Document Name** section displays all chartless documents by **Auto-Name**.

Note: Documents that are in Document Maintenance are not displayed in the **Document Name** list.



Tip: To filter the list by **Document Type** (such as MR Diagnosis or MD EKG), click the **Filter by** drop-down list and make a selection. To remove any filters and display all chartless documents, click the **Reset All** button.

2. To display a list of available charts using **Keyword Values**:
   a. In the **Search Fields**, enter any **Keyword Values** (such as First Name, Last Name, MRN and so forth) to include in the search.

      To reset all the field values, click **Clear Keywords**.

Tip: To search by **Keyword Types**, refer to Searching Using Keyword Types on page 243.

   b. Click **Chart Search.** The **Chart Name** section displays all charts containing the **Keyword Value** criteria specified.

Tip: To filter the **Document Name** list to display only documents that match any of the **Keyword Values** entered, select **Filter Document List With Chart Search**.

3. To display a list of available charts **Account Number**:
   a. In the **Chart Name** window, right-click and select **Search By Account** to find chartless documents by account number.
   b. Enter the account number and click **OK**. All chartless documents matching the account number are displayed.
4. To assign the selected document to a chart, double-click the chart in the **Chart Name** section. The selected chart is attached to the document selected in the **Document Name** list.
5. You are prompted to confirm the action. Click **Yes** to add the document to the chart, or **No** to cancel the action. You can either select another chart or exit.

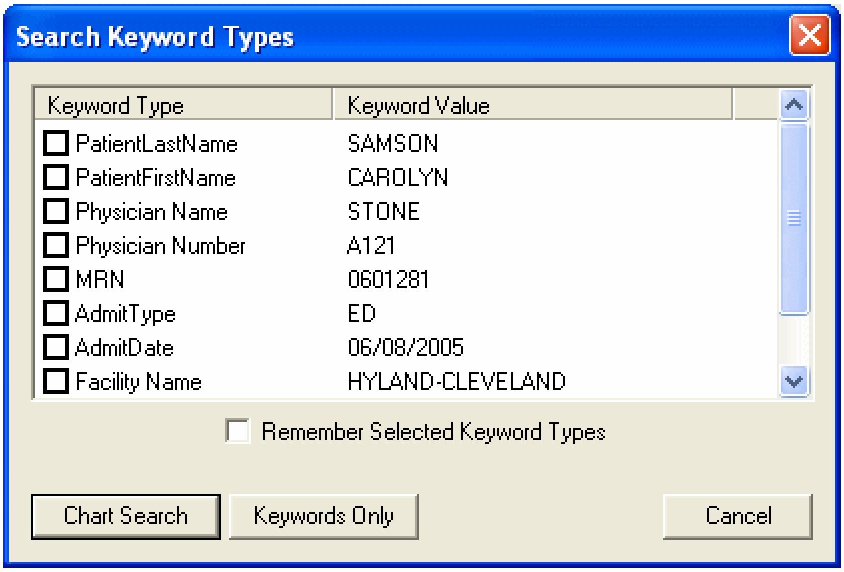
Caution: Once you add a document to a chart, you cannot assign the document to another chart. Make sure you are adding the document to the correct chart.

Searching Using Keyword Types

When manually assigning chartless documents to a chart, you can search for documents using Keyword Types.

To search for a document using **Keyword Types**:

1. From the OnBase Client, select **Medical | Assign Chartless Documents**. The **Assign Chartless Documents** window is displayed. The **Document Name** section displays all chartless documents by Auto-Name.
2. Double-click a document in the **Document Name** list. The **Search Keyword Types** dialog box is displayed. This dialog box lists all **Keyword Types** and **Keyword Values** assigned to the selected document.



3. Select the **Keyword Type** to use in the search.

4. Select **Remember Selected Keyword Types** to keep the same **Keyword Types** selected the next time you access the dialog box. Clearing this option leaves all **Keyword Types** deselected the next time you access the dialog box.
5. To automatically begin the search using the selected **Keyword Types** and **Keyword Values**, click **Chart Search**.
   - To populate the corresponding search fields with the selected Keyword Values without running the search, click **Keywords Only**.

Processing Chartless Documents

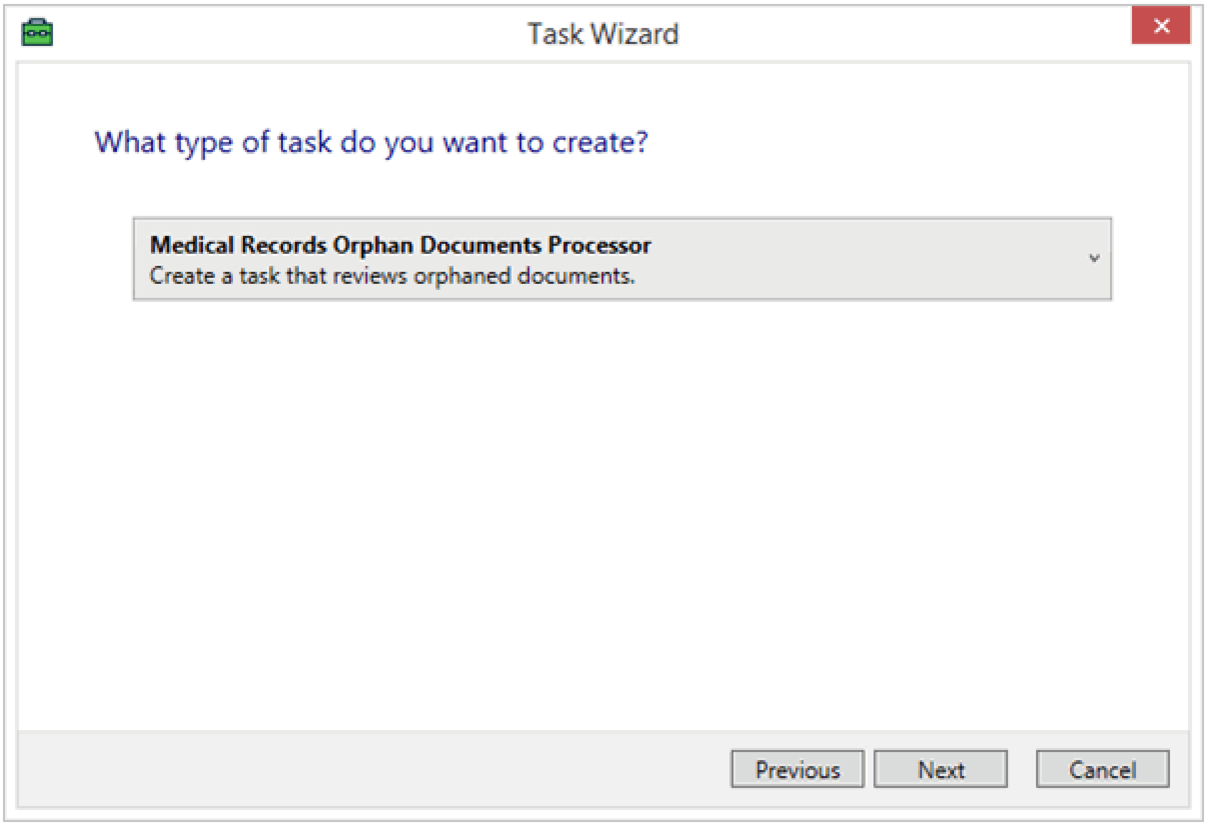
If your system has many documents in Chartless Documents (which may occur when documents are imported into OnBase before charts are created by HL7), then users with Medical Records Administration Privileges can create a task that will attach the orphan documents to their respective charts.

The Medical Records Orphan Documents Processor task is configured in the Unity Management Console (see the **Unity Scheduler** module reference guide for general information on scheduled tasks). When active, the Orphan Documents Processor monitors unattached medical record documents and attached them to corresponding charts as soon as those charts are created.

Note: When deploying multiple services, a single Task or Task Group can be used, or multiple Task Groups can be used if needed.

To create a orphaned documents review task:

1. Select **Medical Records Orphan Documents Processor** from the drop-down list when prompted to select the type of task you want to create.



Note: You can create multiple **Medical Records Orphan documents Processor** tasks, however, only one task will run at a time.

2. Click **Next**. The next page of the wizard warns you that the HL7 Listener service must be restarted in order for the processor to run.
3. Click **Next**. The next page allows you to assign User Groups to the task.

Modifying Charts

When modifying charts, it is recommended to use only HL7 ADT messages to modify patient records. Although the **Chart Modification** interface allows chart values to be modified, these changes are not propagated to all documents and records that might be affected. If necessary, OnBase Workflow can be configured to trigger HL7 messages to update patient records and documents.

Reviewing and Correcting Charts

Charts may be flagged for review due to missing or invalid information. If you have sufficient administrative privileges, you can correct the charts in the Charts Requiring Review queue.

See the following topics:

- Reasons Charts Require Review on page 248
- Automatic Chart Correction on page 249
- Manual Chart Correction on page 249

Reasons Charts Require Review

Charts may be flagged for review for various reasons, depending on the Deficiency Analysis Application assigned when the chart was created by the HL7 module.

The following table outlines the reasons a chart may enter Charts Requiring Review for each Deficiency Analysis Application.

No Deficiency Analysis Application	Medical Records Management Solution	Signature Deficiencies for Epic
• Missing MPI • Missing MRN • Missing Chart ID • Incorrect format for admit date • Incorrect format for discharge date	• Missing MPI • Missing MRN • Missing Chart ID • Incorrect format for admit date • Incorrect format for discharge date • Incorrect format for date of birth • Unknown[a] or missing facility • Unknown or missing Admit Type • Attending physician is invalid, and the facility requires a valid attending	• Missing MPI • Missing MRN • Missing Chart ID • Incorrect format for admit date • Incorrect format for discharge date

a. Unknown Admit Types and facilities are those that have been created automatically by HL7 but have not yet been configured.

Note: If more than four review reasons are found when a chart is created, only the first four reasons are logged.

Automatic Chart Correction

When an HL7 message updates a chart marked for review, OnBase checks whether the logged errors have been addressed. If all errors have been corrected and the chart is not missing any values, then the chart is removed from the Charts Requiring Review queue.

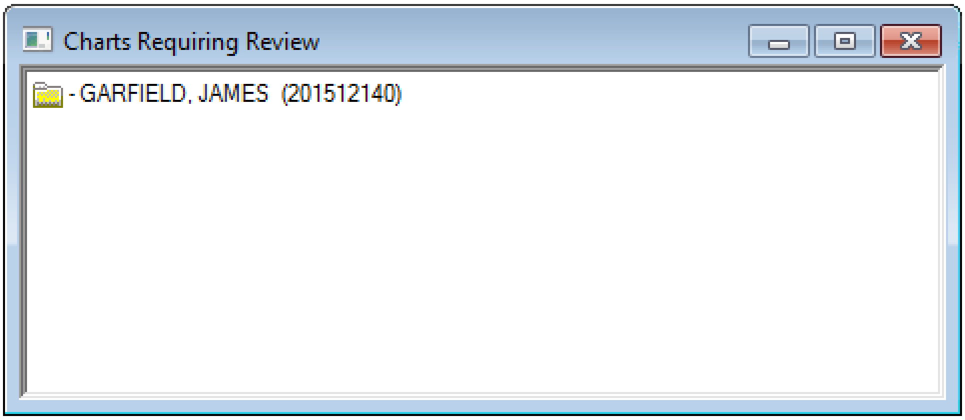
Note: Charts missing a Chart ID # cannot be automatically removed from Charts Requiring Review.

Manual Chart Correction

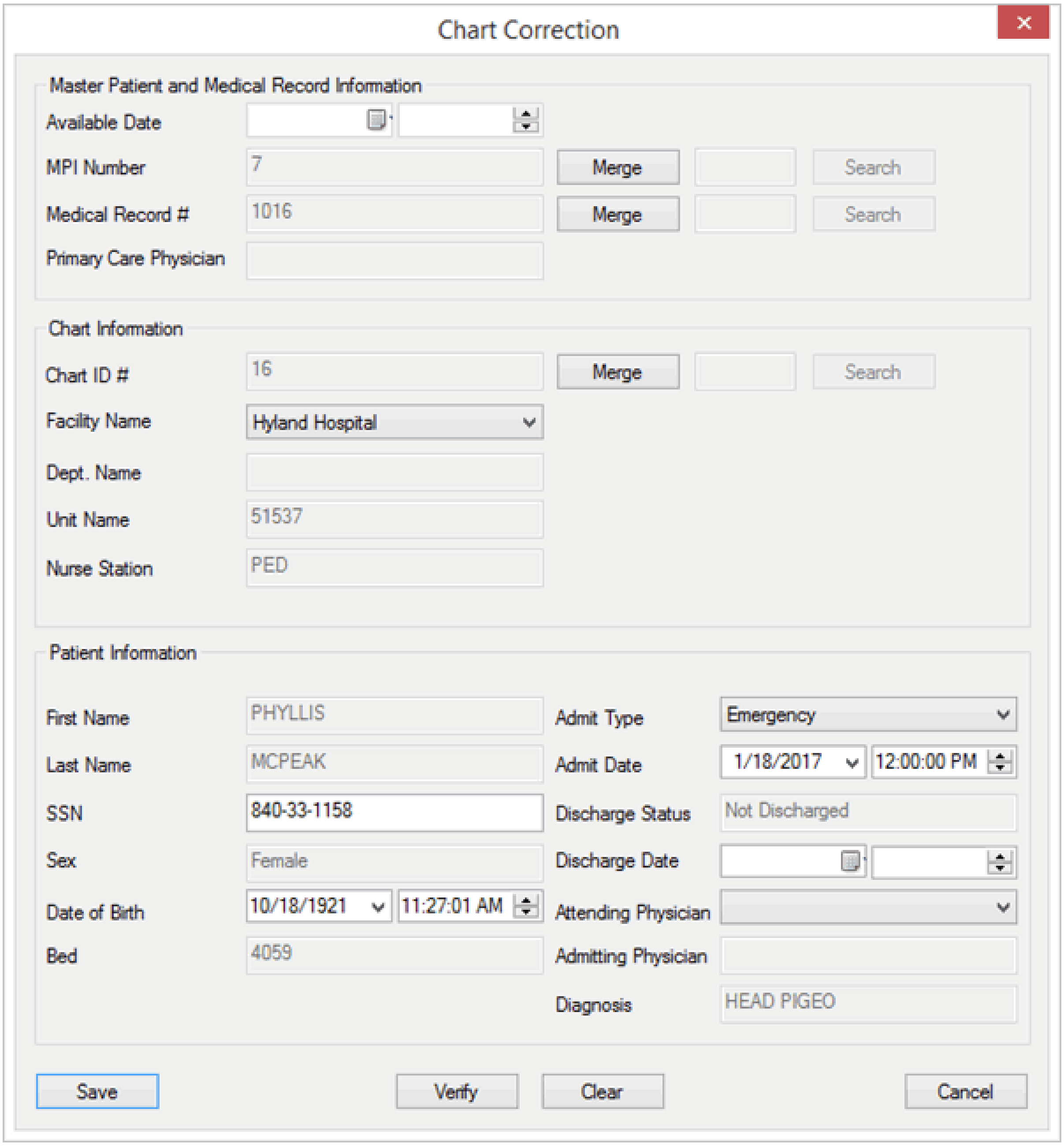
The OnBase Client allows administrators to manually correct charts that have been sent to Charts Requiring Review.

To correct a chart in Charts Requiring Review:

1. Select **Medical | Charts Requiring Review**. The **Charts Requiring Review** dialog box displays all charts that have issues requiring review:



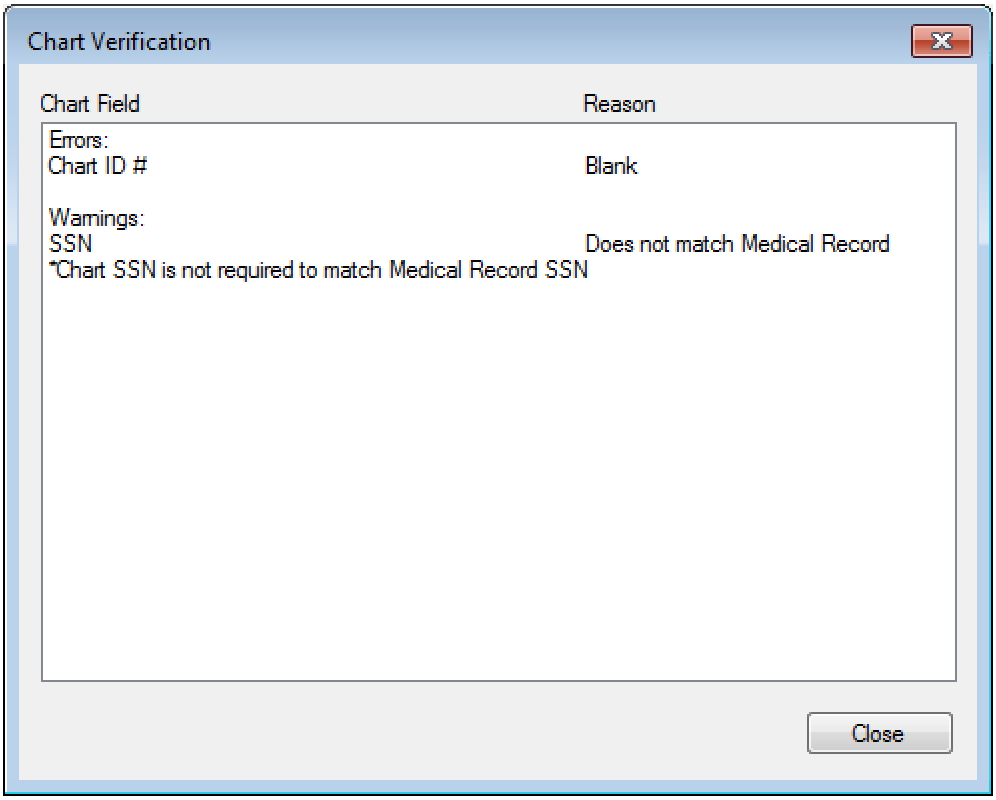
2. Double-click the chart you want to review. The **Chart Correction** dialog box is displayed.



3. Correct the values as needed.

Note: Because assigning authorities cannot be specified in the **Chart Correction** dialog box, the **MPI Number**, **Medical Record #**, and **Chart ID#** fields are not editable.

If necessary, click the **Verify** button to view a list of remaining issues that require correction. The **Chart Verification** dialog box displays any existing error conditions and warnings.



Note: Charts associated with facilities and Admit Types created by HL7 can be completed out of Charts Requiring Review, even if those facilities and Admit Types have not been properly configured yet. Be sure to configure HL7-created facilities and Admit Types before completing charts out of Charts Requiring Review.

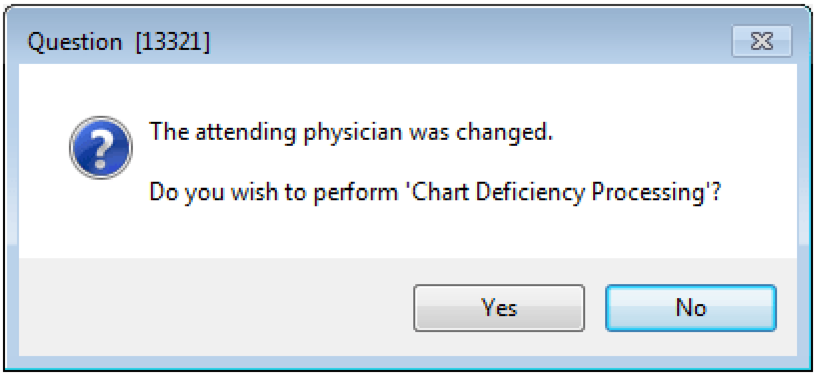
Tip: To delete an empty chart, see Deleting Empty Charts on page 255.

4. When finished, click **Save** to save changes and exit the **Chart Correction** dialog box.
5. Click **Yes** to continue saving your changes.

   If you changed the **Attending Physician**, a prompt is displayed. See Changing the Attending Physician on page 252.

Changing the Attending Physician

If you changed the attending physician, the following prompt is displayed: **Do you wish to perform 'Chart Deficiency Processing'?**



This processing applies only to charts that use the Medical Records Management Solution as their Deficiency Analysis Application.

- Click **Yes** if the Analysis server should check whether any automatic deficiencies need to be added to the chart or its documents. Use this option if your system is configured to automatically create deficiencies.
- Click **No** if you do not want the chart to be checked for automatic deficiencies.

Running a Script on a Chart

From the **Chart Search** or the **Assign Chartless Documents** window in the OnBase Client, you can run a VBScript on a chart.

Run a Script from Chart Search

1. From the OnBase Client, select **Medical | Chart Search**. The **Chart Search** window is displayed.
2. In the **Search Fields**, type in search criteria and select **Chart Search**. All charts meeting the criteria are displayed in the **Chart Name** pane.
3. Select a chart, right click and select **Run Script...** to display a list of all available scripts.
4. Select a script to run it on the chart. See your system administrator for additional information regarding scripts available for charts.

Run a Script from Chartless Documents

1. From the OnBase Client, select **Medical | Assign Chartless Documents**. The **Assign Chartless Documents** window is displayed.
2. In the **Search Fields**, type in search criteria and select **Chart Search**. All charts meeting the criteria are displayed in the **Chart Name** pane.
3. Select a chart, right click and select **Run Script...** to display a list of all available scripts.
4. Select a script to run it on the chart.

Note: See your system administrator for additional information regarding scripts available for charts.

Note: For additional information, see Searching for and Viewing Charts on page 239 and Assigning Chartless Documents to Charts on page 241.

Running a Script from a Document

1. Open the document on which you want to run the script.
2. Select the script one of three ways:
   - From the OnBase Client, click the appropriate script toolbar button in the toolbar.
   - Select **Document | Run Script** and select the appropriate script.
   - Right-click, select **Run Script**, and select the appropriate script.

Note: In the OnBase Client, in order to use a script toolbar button, it must be part of your current toolbar layout.

Running a Script from a Document List

You can run a script on multiple documents in a Document Search Results list.

1. Within the list, select the document(s) on which you will run the script.
2. Select the script one of three ways:
   - From the OnBase Client, click the appropriate script toolbar button in the main Client toolbar.
   - Select **Document | Run Script** and select the appropriate script.
   - Right-click, select **Run Script**, and select the appropriate script.
3. The script acts upon each selected document in the list on an individual basis, sequentially.

Deleting Empty Charts

As a user with Administrative privileges, you can use the **Delete Chart** feature to delete charts from the system that were created in error and/or do not contain any documents.

1. Select a chart in Chart Search or Charts Requiring Review.
2. Right-click and select **Delete Chart**.
3. A confirmation dialog box asks whether you're sure you want to delete the chart. Click **Yes** to permanently remove the chart and all chart descriptors, or **No** to cancel the process without deleting the chart.

   If you clicked yes, the chart is deleted from OnBase. If applicable, the Virtual E-Form representing the chart in OnBase Workflow is removed from all life cycles and deleted.

Note: A chart containing documents cannot be deleted. (You will be notified that the chart contains active documents and the process will be canceled.)

Scanning Medical Documents

If OnBase is also licensed for Document Imaging, then the following features can be used with scanned chart documents:

- **Medical records indexing support**—Allows you to look up a patient's chart from the indexing interface, index the document with values from the chart, and assign the document to the chart. See Resolving Documents to Charts Using Chart Search on page 256.

Note: This feature is available only with the OnBase Client.

- **Adding pages to chart documents**—Scan operators with Chart Search privileges can scan more pages to a document retrieved through Chart Search in the OnBase Client. See Scanning More Pages Using Chart Search on page 257.
- **MPI Lookup**—Allows you to look up a patient's charts and pull information from them as indexing values for medical documents. See Indexing Medical Documents Using MPI Lookup on page 258.

Resolving Documents to Charts Using Chart Search

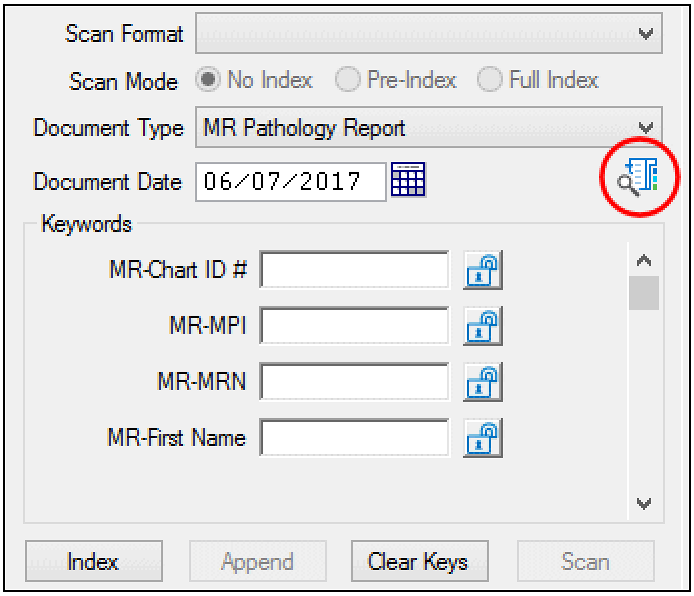
When a document is added to a chart Document Type, OnBase uses the Keyword Values to assign the document to a chart. If a matching chart cannot be found, the document is sent to Chartless Documents by default.

In the OnBase Client, scan queues can be configured to display a **Chart Search** dialog box during indexing if a document cannot be matched to a chart automatically. From this dialog box, indexers can manually assign a document to its chart, or they can click **Cancel** to send the document to Chartless Documents.

Note: Depending on your system's configuration, documents may need to be committed or processed through OnBase Workflow before they are assigned to their charts or sent to Chartless Documents.

To search for a chart during indexing:

1. Click the **Chart Search** button in the indexing pane. The **Chart Search** dialog box is displayed.



2. In the search fields provided, type any known values for the patient's chart.
3. Click **Chart Search**. Matching charts are displayed in the upper-right pane.
4. To display information about a chart, select it. OnBase displays the patient's information in the **Demographics** pane. A preview of the Keyword Values associated with the chart is displayed in the **Document Keywords** pane.
5. Double-click the chart you want to assign the document to. The Keyword Values from the chart are automatically populated in the indexing panel.
6. Add any Keyword Values as needed.
7. Click **Index** to assign the document to the chart.

Note: If a matching chart is not found based on the document Keyword Values, then the **Chart Search** dialog box is displayed when you click **Index**. If you do not assign the document to a chart, then the document's chart assignment will need to be resolved later.

Scanning More Pages Using Chart Search

On registered workstations, scan operators with Chart Search privileges can scan more pages to a document retrieved through Chart Search in the OnBase Client. When the document is displayed in the chart viewer, the scan operator can right-click and select **Scan More Pages**. The Document Imaging window is displayed. The scan operator can then open a scan queue, select a scan format, and click **Scan** to scan additional pages. When scanning is complete, the Document Imaging window is minimized and the document is updated in the chart viewer.

Indexing Medical Documents Using MPI Lookup

If OnBase is configured for MPI lookup, then you can look up a patient's existing chart information and use it to index medical documents. MPI lookup helps save time and improve accuracy during indexing.

- Some Document Types may have other lookup options configured. For information about other lookup options, see Reverse Keyset Lookup in the OnBase Client help.
- The MPI lookup option is available only for medical record Document Types.
- The name of the MPI lookup option varies depending on your system's settings. The option's name is configured by your system administrator.

To index a document using MPI lookup, see Using MPI Lookup on page 258.

For an illustration of where MPI lookup is available, see MPI Lookup Locations on page 262.

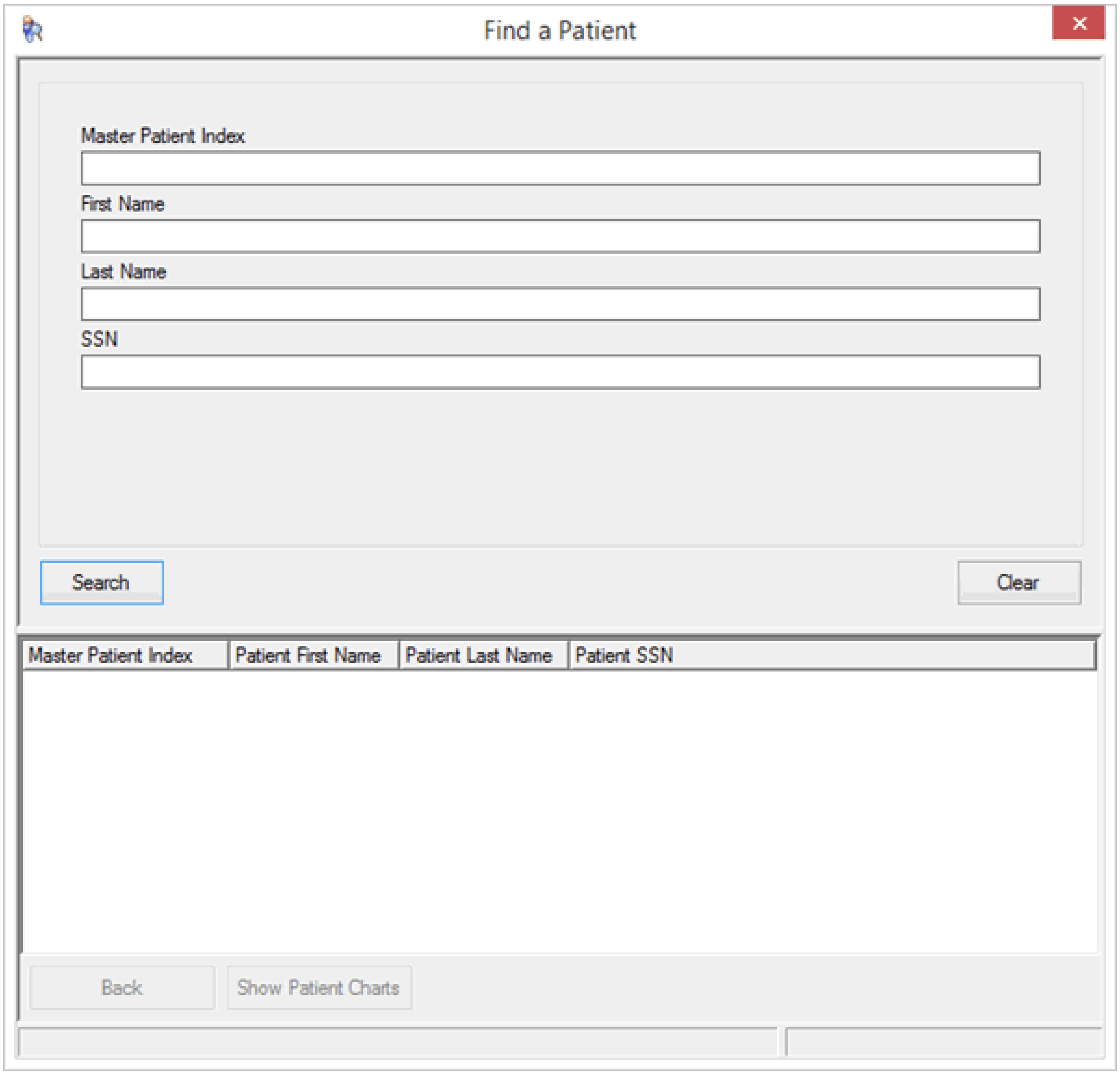
Using MPI Lookup

The following steps describe how to index a document using MPI lookup. Perform these steps when importing, indexing, or re-indexing a document.

For information about the availability of this option, see Indexing Medical Documents Using MPI Lookup on page 258 and MPI Lookup Locations on page 262.

1. Select a medical record Document Type from the **Document Type** drop-down. The MPI lookup option becomes available.
2. Select the MPI lookup option. Depending on the current context, the option may be represented as a button or as a drop-down option. For illustrations of this option, see MPI Lookup Locations on page 262.

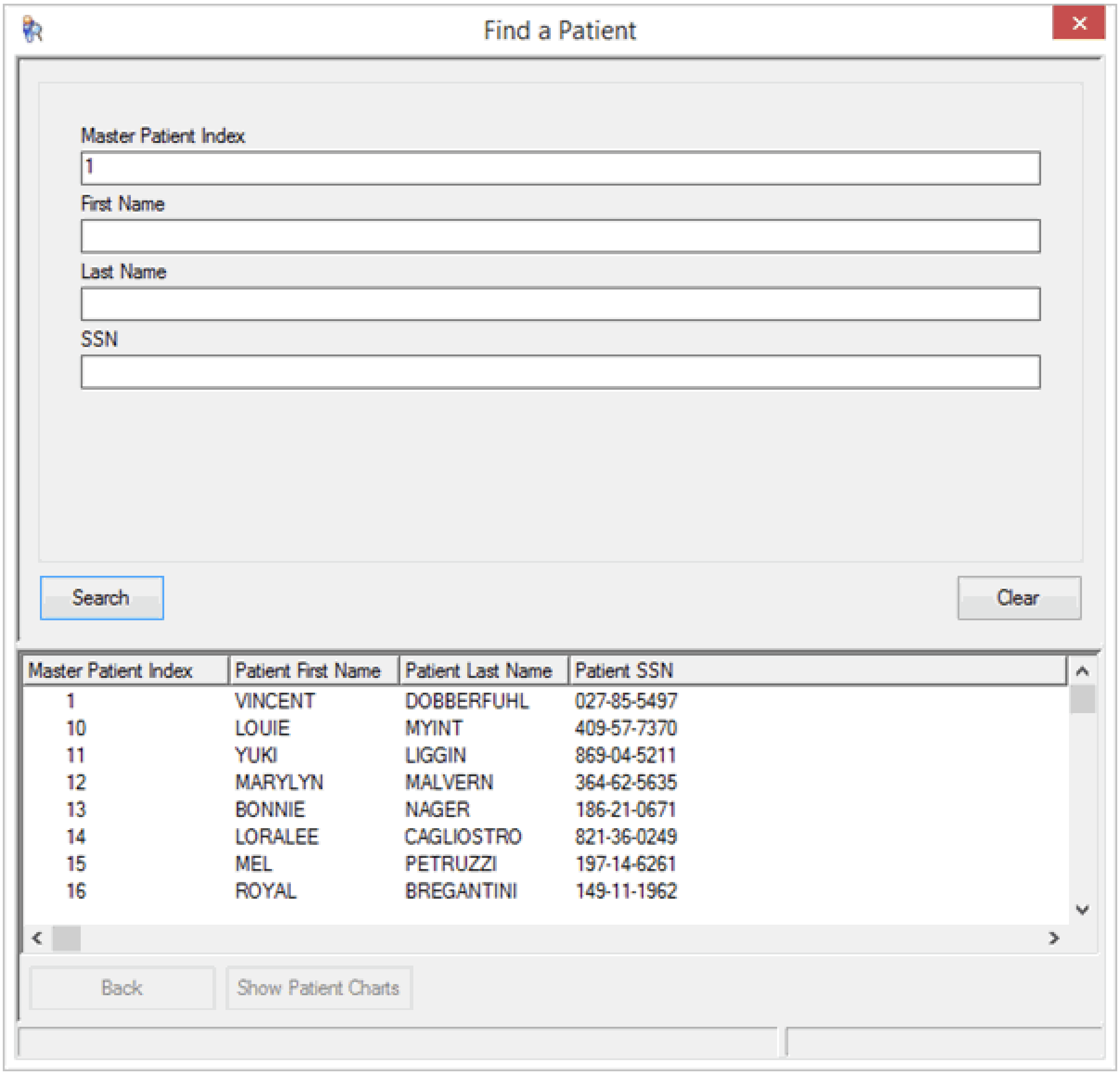
The lookup window is displayed.



3. In the fields provided, type any known values for the patient associated with the document you are indexing. Available fields may vary depending on your system's setup.

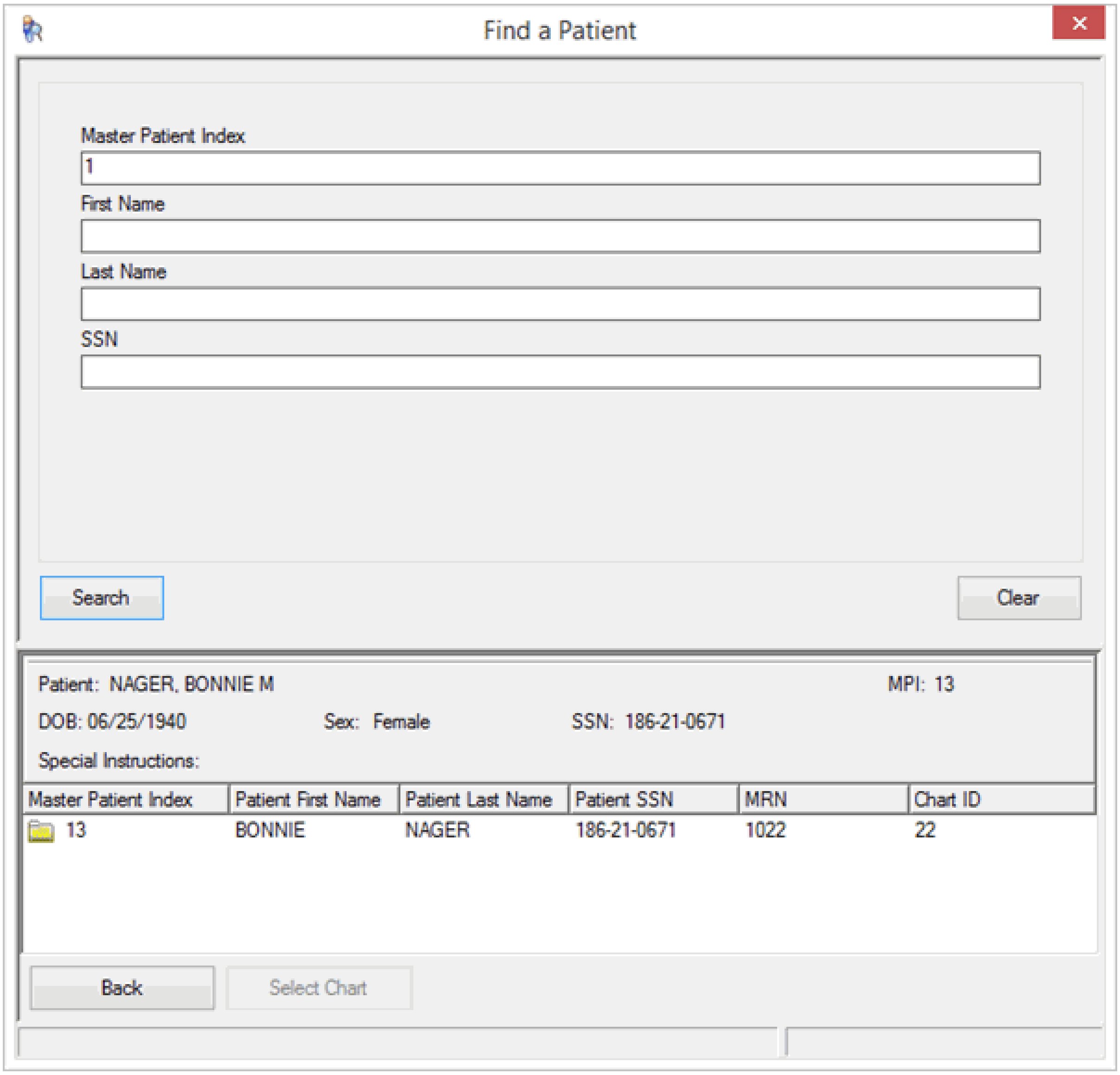
Tip: OnBase automatically performs a wildcard search for any records whose values begin with the values you entered. For example, if you enter **12** for the Master Patient Index, OnBase retrieves all patients whose Master Patient Index begins with **12**. You do not have to append wildcards to the values you enter.

4. Click **Search**. The results list displays any patient records matching your criteria.



5. Select the patient’s record.

6. Click **Show Patient Charts**. The results list displays all active charts associated with the patient. If the patient has no active charts, a message is displayed.



7. Select the appropriate chart for the document you are indexing. The patient's demographic information is displayed above the list.
8. Do one of the following:
   - To index the document with information from the patient's chart, click **Select Chart**. The chart values are populated for the document's chart-related Keyword Types.
   - To go back to the list of patient records, click **Back**.
9. Review the Keyword values and modify them as needed.
10. Proceed with importing, indexing, or re-indexing the document. When finished, click the **Import**, **Index**, or **Re-Index** button.

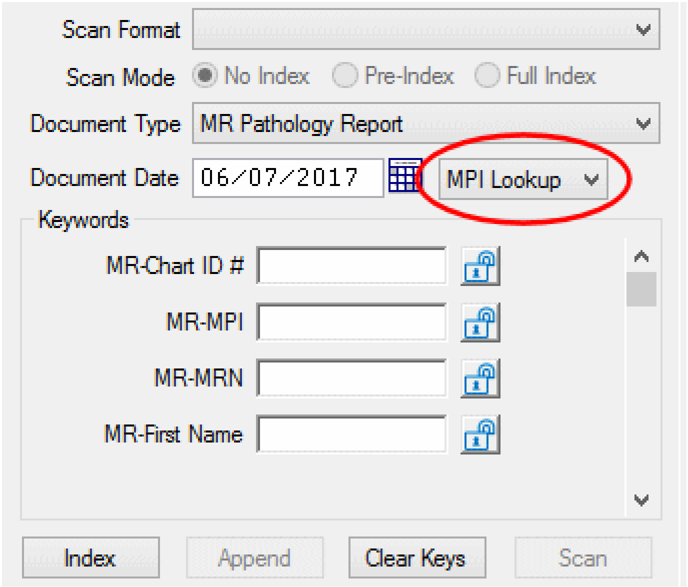
MPI Lookup Locations

If configured, the MPI lookup feature is available when a medical record Document Type is selected in the following OnBase Client locations:

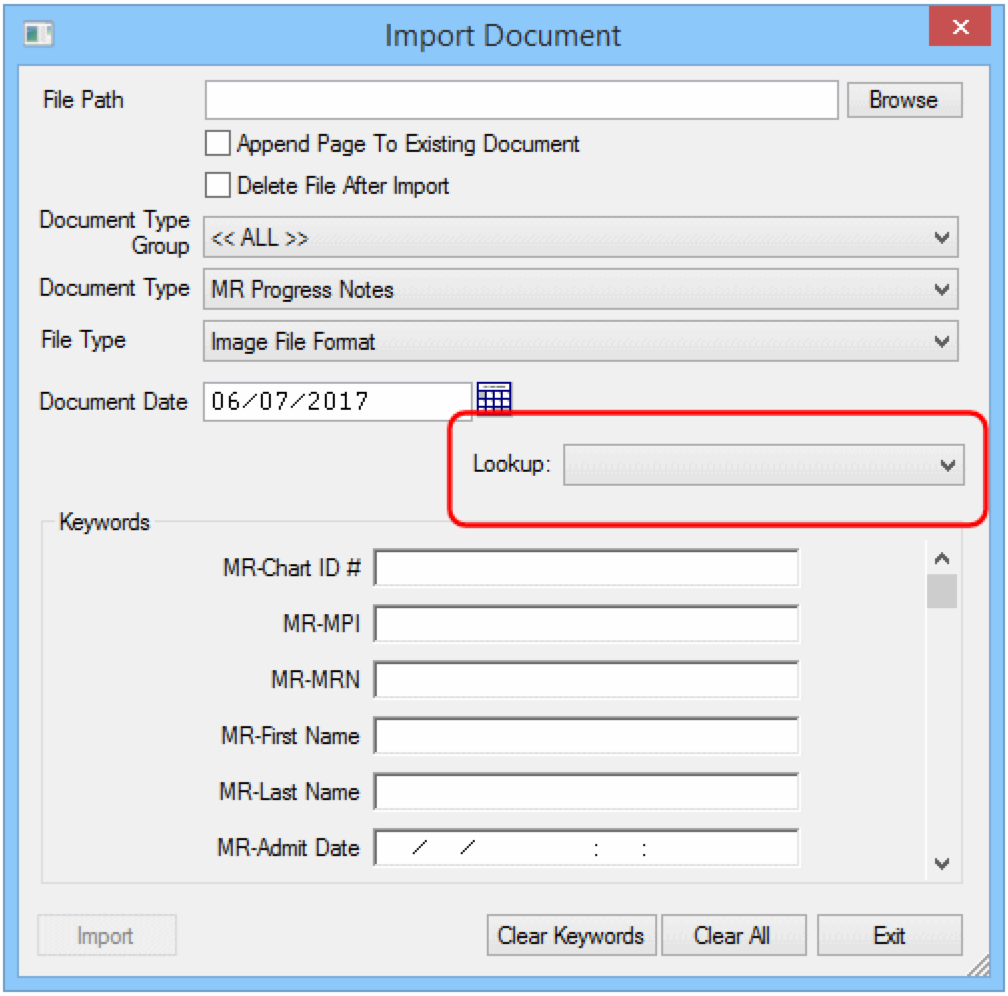
- The **Document Imaging** window
- The **Import Document** dialog box
- The **Re-Index Document** dialog box

The following illustrations show the location of the MPI lookup option in these contexts.

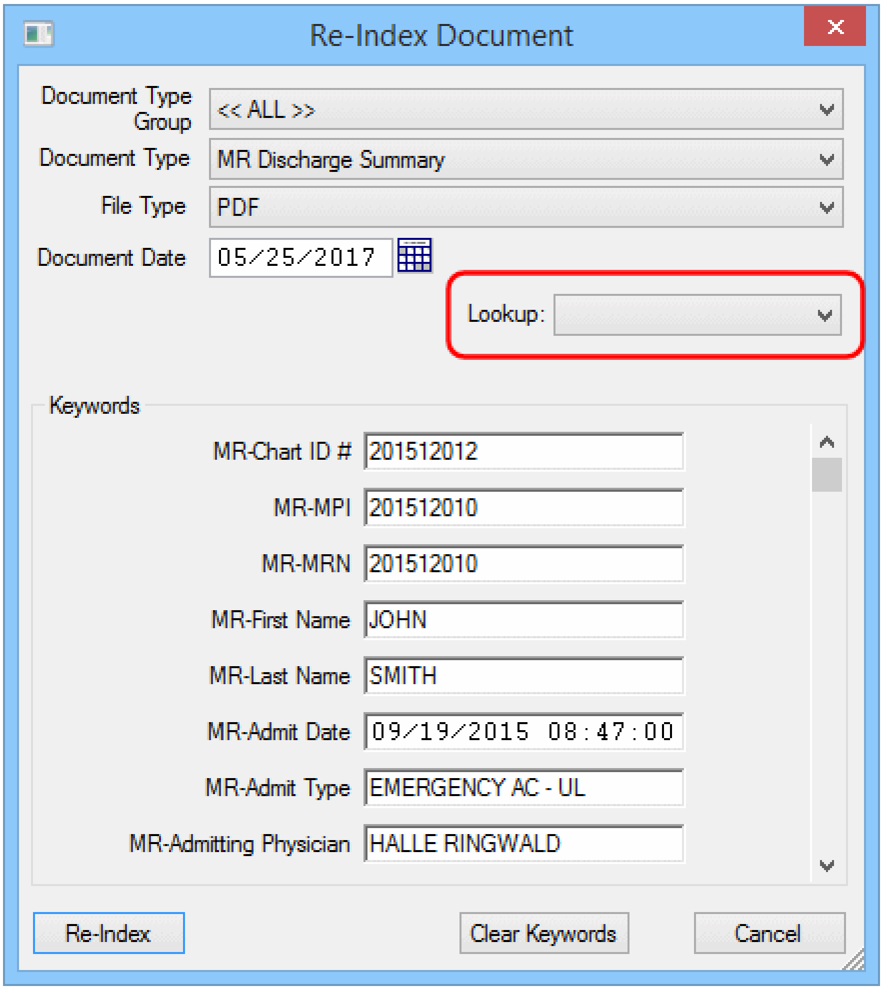
Users who index scanned documents in the **Document Imaging** window can access MPI lookup by clicking the MPI lookup button located next to the **Document Date** field.



Users importing documents on an ad hoc basis can access MPI lookup using the **Lookup** drop-down in the **Import Document** dialog box.



Users with re-indexing privileges can access MPI lookup using the **Lookup** drop-down in the **Re-Index Document** dialog box.



To index a document using MPI lookup, see Using MPI Lookup on page 258.

Rules for Automatically Attaching Documents to s & Charts

Chart data fields in the OnBase Configuration module can be configured to automatically assign documents to patient records and charts upon import or re-index. The following rules apply to this function.

Note: Depending on your Medical System Settings, documents may need to be processed through OnBase Workflow before they are attached to patient records or charts. Attachment options can also be configured at the process level for individual DIP processes.

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1. Documents must belong to a medical record Document Type Group.
2. To be attached to a patient record, the document must be indexed with a valid MPI or MRN.
   - If the document is indexed with an MPI or MRN that does not match an existing MPI or MRN, the document will be logged as an orphan document.
   - If the MPI and MRN belong to different patients, the document will be logged as an orphan document.
   - If the document is attached to a chart, but the chart has a different MPI or MRN, the document will be logged as an orphan document.
3. If a document belongs to a chart Document Type, it must be indexed with the Keyword Types mapped to the **Chart ID #** and **MPI** chart data fields

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Note: The name of the **Chart ID #**, **MPI**, or **MRN** fields may vary depending on your system's chart data field configuration.

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4. If a document belongs to a chart-optional Document Type, chart attachment is contingent on the Chart ID # field.
   - If the Chart ID # is populated on the document, OnBase checks the Keyword Types configured to automatically match documents to charts. If a single matching chart is found, the chart-optional document is attached to the chart. If a single matching chart is not found, the chart-optional document is sent to Chartless Documents.
   - If the Chart ID # is blank, the chart-optional document is not attached to a chart or sent to Chartless Documents.
5. Chart documents can be automatically assigned to charts that are active, inactive, or closed.
6. There can only be one matching chart available. If there is no chart available, or if more than one chart with an active, inactive, or closed status is available, the document will automatically be considered a Chartless Document and will have to be manually assigned to a chart.
7. If a document's chart has not yet been created, the document is sent to Chartless Documents. For information about resolving chartless documents, see Assigning Chartless Documents to Charts on page 241.

Re-Indexing Considerations for Medical Records

The following re-indexing considerations for medical records should be taken into account.

Caution: Ensure you understand the possible effects of re-indexing before proceeding. Documents that are assigned both AutoFill Keyword Sets and Keyword Type Groups may not be indexed with the expected values. See the considerations for re-indexing in the OnBase Client or AutoFill Keyword Sets help files.

Re-Index a Document Into a Chart Document Type

If you re-index a document into a Document Type configured for charts, OnBase may automatically add the document to a chart (if a match can be found) or mark it as a chartless document that can be manually assigned to a chart.

This is the case if a document is re-indexed using any of the following methods:

- **File | Re-Index** or the right-click **Re-index** option in OnBase client applications
- Workflow re-index
- Scan queue batch re-index
- Keyword changes using the **Add/Modify Keywords** dialog box or Workflow

Depending on your Medical System Settings, re-indexed documents may need to be processed through OnBase Workflow before they are added to a chart or sent to Chartless Documents.

Re-Index a Document Out of a Chart

If a re-index operation causes the document to be removed from a chart (either it gets assigned to another chart, becomes a chartless document, or is no longer a chart document), then all unburned deficiencies and their associated deficiency notes will be removed from the document.

If the document re-index causes the document to remain part of the same chart, then the deficiencies and notes are not deleted.

Depending on your Medical System Settings, re-indexed documents may need to be processed through OnBase Workflow before they are added to a new chart or sent to Chartless Documents.

Note: In some cases, a document can belong to a chart Document Type without being attached to a chart or sent to Chartless Documents. See your system administrator for more information.

Re-Index a Document Containing Confidentiality Codes

If keywords are modified on a document containing confidentiality codes, the current confidentiality code may be removed or a new one may be applied. The outcome varies depending on the new confidentiality code keyword value and the Document Type.

- When a medical record document containing a valid confidentiality code in the confidentiality code keyword field is re-indexed with a keyword value that does not match a confidentiality code, the existing confidentiality code is removed.
- When a medical record document containing confidentiality codes is re-indexed to another medical record Document Type or to a Document Type assigned to the Medical Records Custom Query, the existing confidentiality code remains applied provided the confidentiality code keyword is assigned to the new Document Type.
- When a medical record document containing confidentiality codes is re-indexed to a Document Type that is neither configured for medical records nor assigned to the Medical Records Custom Query, all confidentiality codes are removed from the document.
- When a non-medical document is re-indexed to a medical record Document Type or to a Document Type assigned to the Medical Records Custom Query, confidentiality codes will be applied if the confidentiality code keyword value corresponds to a valid confidentiality code.

Document Separation Considerations for Medical Records

Users with sufficient privileges can split medical record documents using the following tools:

- The Document Separation layout in the Unity Client and Medical Records Unity Client
- The Document Separation batch processing queue
- The Document Separation window in the OnBase Client

If a user splits a chart document containing deficiencies, any deficiencies on the copied pages will be copied to the new document as long as the new document belongs to the same medical record chart. If the new document is not attached to the same chart, the deficiencies are removed.

Importing Physicians

The Physician Import Processor can both create and update physician users using information from an import file. Users must have the **Medical Records Physician Importer** privilege to run and schedule the Physician Import Processor in the OnBase Client.

To run or schedule the Physician Import Processor, see the following topics:

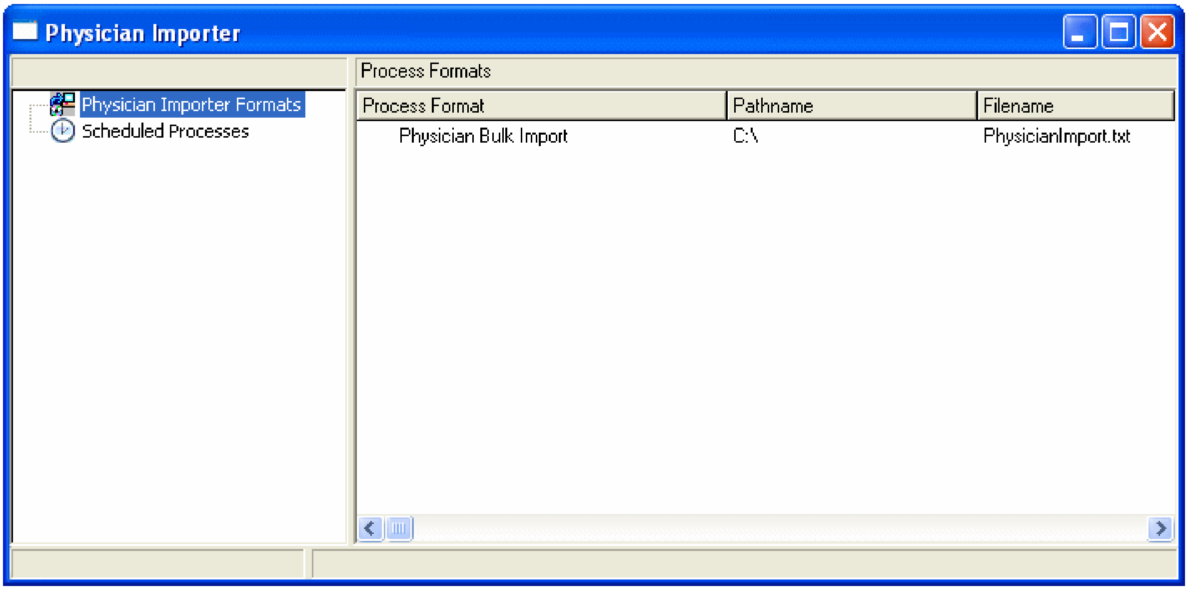
- Running the Physician Import Processor on page 268
- Scheduling the Physician Import Processor on page 269

Running the Physician Import Processor

The following steps describe how to run the **Physician Import Processor** in the OnBase Client. The **Medical Records Physician Importer** privilege is required to run the Physician Import Processor. For information, see Assigning Privileges to Run the Physician Import Processor on page 196.

To run the Physician Import Processor:

1. In the OnBase Client, select **Processing | Physician Importer**. The **Physician Importer** window is displayed.



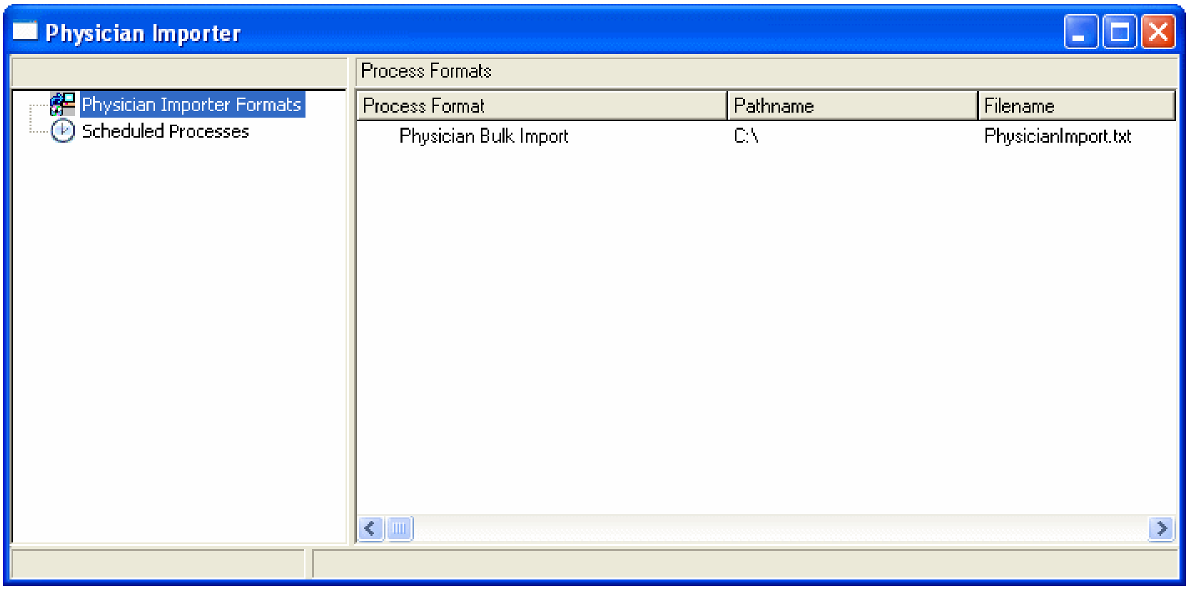
2. From the right pane, select a physician import process format.
3. Right-click and select **Execute Import Process**. A progress bar is displayed while the process runs.
4. Check the verification report located in **SYS Verification Reports** for any errors. These reports are indexed with a description of **Physician Information Importer**.
5. Verify the physicians have been added in OnBase Configuration under **Medical | Physicians | Physician Information**.

Scheduling the Physician Import Processor

The following steps describe how to schedule the Physician Import Processor in the OnBase Client. The **Medical Records Physician Importer** privilege is required to run the Physician Import Processor. For information, see Assigning Privileges to Run the Physician Import Processor on page 196.

To schedule the Physician Import Processor:

1. In the OnBase Client, select **Processing | Physician Importer**. The **Physician Importer** window is displayed.



2. From the right pane, select a physician import process format.
3. Right-click and select **Schedule Import Process**. The **Scheduling Management** window is displayed.
4. See Scheduling on page 74 for information about creating and configuring a schedule process format. The information in this chapter also applies to other processors that may be part of your solution, including COLD and DIP.

Note: For a process to run at the scheduled time, the processing workstation must be running the OnBase Client with the **-SCHED** command line switch.

OnBase®
Foundation EP5

Signature Deficiencies for Epic

User Guide

Foundation EP5

Overview

Signature Deficiencies for Epic allows analysts to create and assign document deficiencies to physicians for completion. Physicians can then electronically sign and update the documents by accepting the deficiencies, or they can decline the deficiencies to submit the documents for Reanalysis.

Two types of deficiencies can be created and addressed:

- **Signature deficiencies**—Used on documents that require a physician's signature. Once completed, the Signature deficiency is replaced with the physician’s signature and time stamp.
- **Missing Information deficiencies**—Used on documents that are missing required information. Physicians complete these deficiencies by typing out the information and clicking **Accept**. Once completed, the Missing Information deficiency is replaced with the text the physician provided, the physician’s signature, and the time stamp.

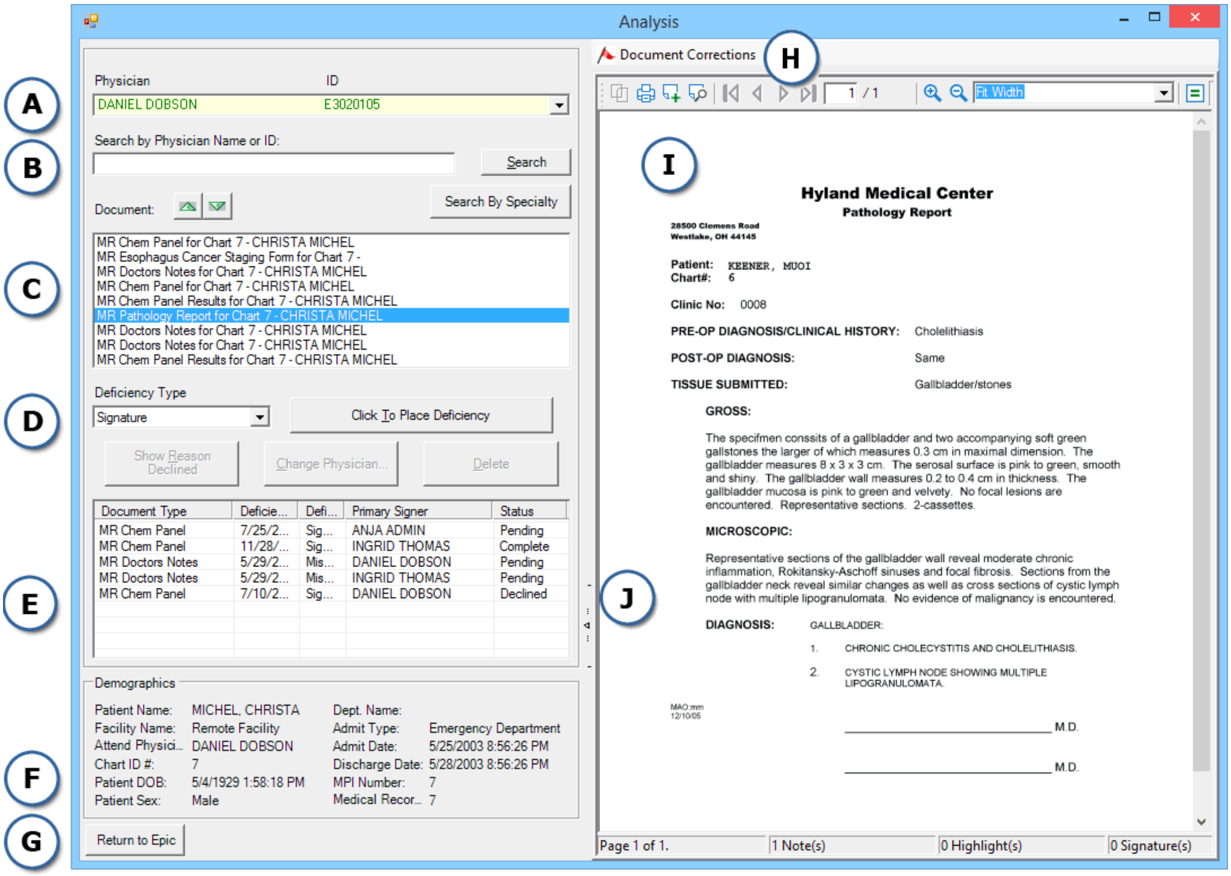
To analyze documents and create deficiencies, see Analysis on page 272.

To sign and complete deficiencies, see Completion on page 288.

Note: Deficiencies can only be completed using image documents and not other file formats.

Analysis

Analysts can create, view, and update deficiencies on documents using the OnBase Analysis window. The Analysis window is displayed when an analyst selects a patient account and clicks **Analyze Scans**.



A. Physician drop-down	F. Demographics pane
B. Physician search options	G. Return to Epic button
C. Document list	H. Corrections button
D. Deficiency options	I. Document viewer
E. Deficiency list	J. Collapse/expand deficiency info

For information about using the Analysis window, see the following topics:

- Analysis Window Components on page 273
- Creating & Reassigning Deficiencies on page 277
- Submitting Documents for Correction on page 285

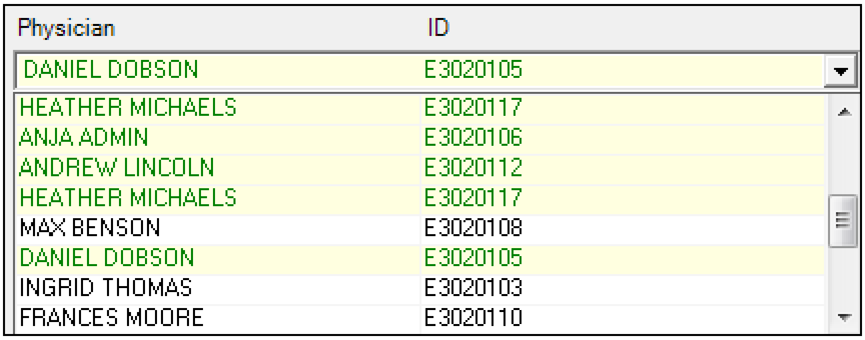
Analysis Window Components

The Analysis window's components are described in the following topics.

Physician Drop-Down

Use the **Physician** drop-down to select the physician for deficiency assignment. The assigned physician will receive an In Basket notification for each document he or she must sign.

The attending physician is selected by default. The top of the list contains up to 10 of the most recently selected physicians in the order they were last selected, followed by the complete list of available physicians. Recently selected physicians are highlighted in yellow.



Physician Search Options

Use the search options to find a physician by name, ID, or specialty. For information about searching, see Searching for a Physician on page 280.

Document List

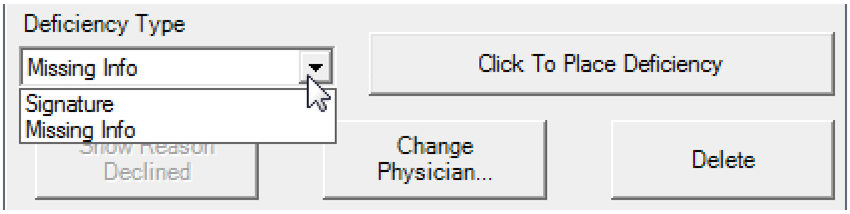
This list comprises encounter-related documents that are stored in OnBase. This list may be filtered to display only documents that require Analysis, depending on your system's configuration.

Select a document from this list to analyze or view the document's deficiency information. You can click the **Previous** or **Next** buttons to navigate to the previous or next document in the list.

Deficiency Options

Use the following options to work with deficiencies:

- Deficiency Type drop-down: Allows you to switch between creating signature deficiencies and missing information deficiencies. Select **Signature** or **Missing Info** from the drop-down before clicking **Click To Place Deficiency**.



- **Click To Place Deficiency**: Allows you to place the deficiency on the document. After clicking this button, click on the document to place the deficiency in the selected location.
- **Show Reason Declined**: Allows you to view the reason a deficiency was declined. Physicians must provide a reason for declining a deficiency.
- **Change Physician**: Click to assign the deficiency to a different physician. This option is unavailable if the deficiency has been accepted by the physician.
- **Delete**: Click to delete the selected deficiency from the document. This option is unavailable if the deficiency has been accepted by the physician.

Note: These buttons are unavailable when a patient-level document is displayed in the viewer. Deficiencies cannot be applied to patient-level documents.

Deficiency List

This table outlines existing deficiencies on the listed documents. Information includes the Document Type and the deficiency's creation date, type, assigned physician, and current status.

Select a deficiency from the list to display or modify deficiency information. Double-click the deficiency to display the document the deficiency was added to in the document viewer.

Note: You cannot modify deficiencies that have been accepted by a physician.

Demographics Pane

This section displays patient demographic and encounter information for the selected document.

Return to Epic Button

This button allows you to close the Analysis window and return to Epic after you finish creating deficiencies.

Corrections Button

If your system is set up for document corrections, one or more buttons may be displayed above the document viewer. If a document needs to be corrected (for example, because it was misfiled), click the appropriate button to submit the document to OnBase Workflow for review.

See Submitting Documents for Correction on page 285 for more information.

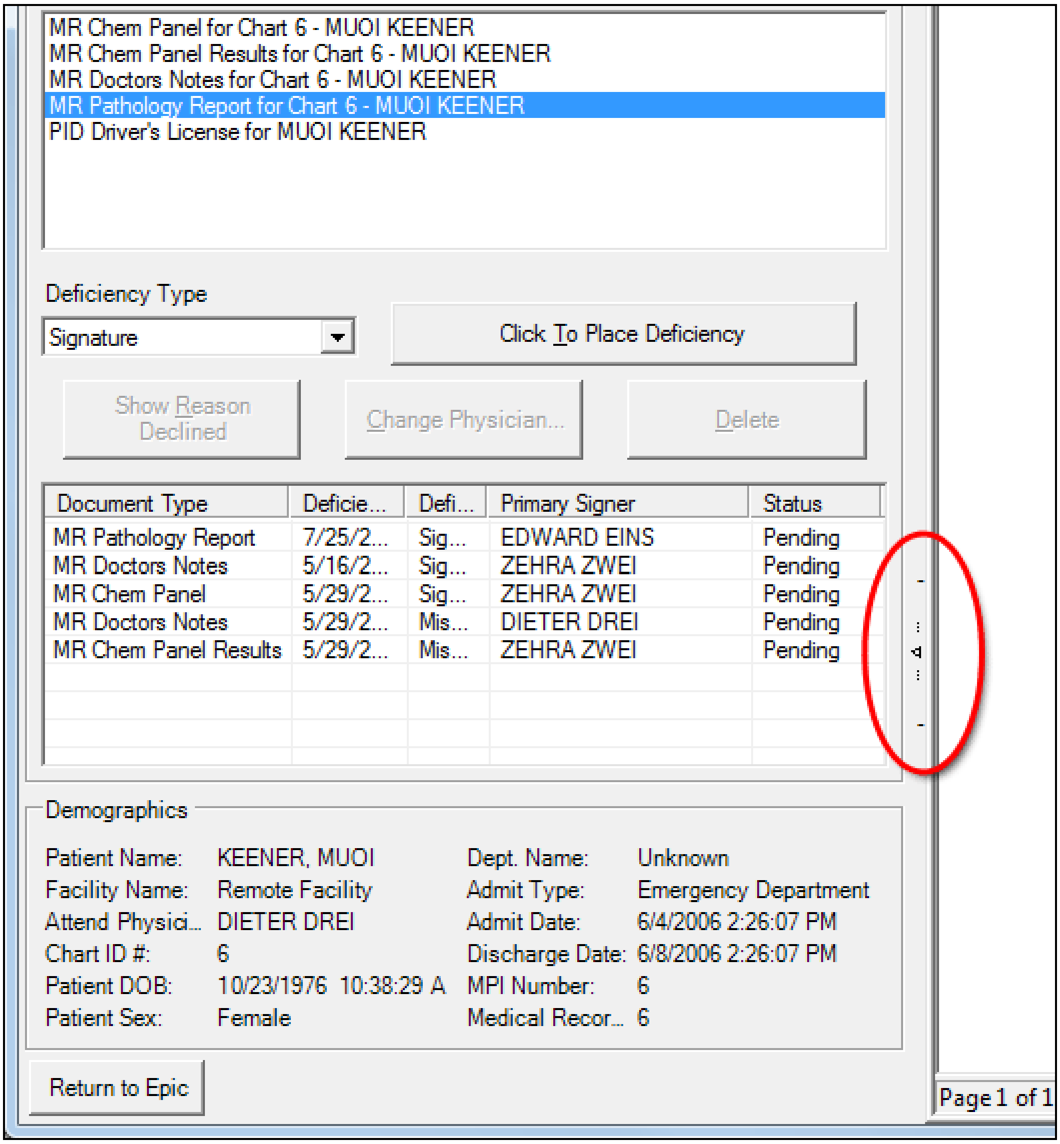
Document Viewer

The document viewer displays the document. Analysts can use the viewer to place a deficiency anywhere on the document.

For information about using document viewer and its toolbars, see Document Viewer Usage on page 294.

Collapse/Expand Deficiency Information Button

To increase the document viewing area, click the button on the border between the viewer and the deficiency information panel.



The viewer expands to fill the Analysis window, and the deficiency information panel is collapsed on the left side. Click the button again to display the panel and return the viewer to its previous size.

Creating & Reassigning Deficiencies

The Analysis window allows you to create Signature and Missing Information deficiencies for physicians to address. You also can reassign or delete deficiencies that have not yet been completed. See the following topics for more information:

- Creating a Deficiency on page 277
- Moving Deficiencies on page 280
- Deleting Deficiencies on page 280
- Searching for a Physician on page 280
- Changing the Assigned Physician on page 283

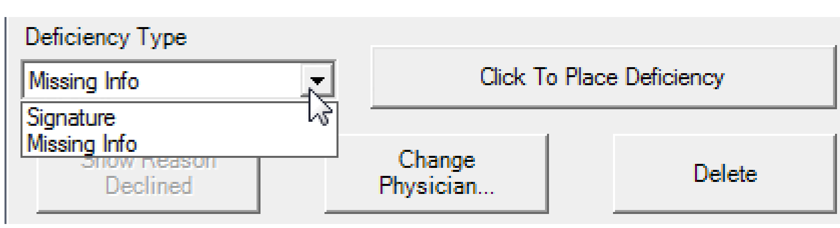
Creating a Deficiency

Deficiencies can be applied to encounter-level documents displayed in the Analysis window. Deficiencies cannot be applied to patient-level documents, which are shared across multiple encounters.

Note: If a document needs to be rotated, rotate it and save the rotation before applying a deficiency. If a document is rotated after a deficiency is applied, then the deficiency's orientation on the document changes.

To create a deficiency on the document displayed in the Analysis window:

1. Select the physician whose signature is missing using either of the following methods.
   - Select the physician from the **Physician** drop-down list. By default, the attending physician is selected.
   - Search for the physician as described under Searching for a Physician on page 280.
2. Select a Deficiency Type from the drop-down:

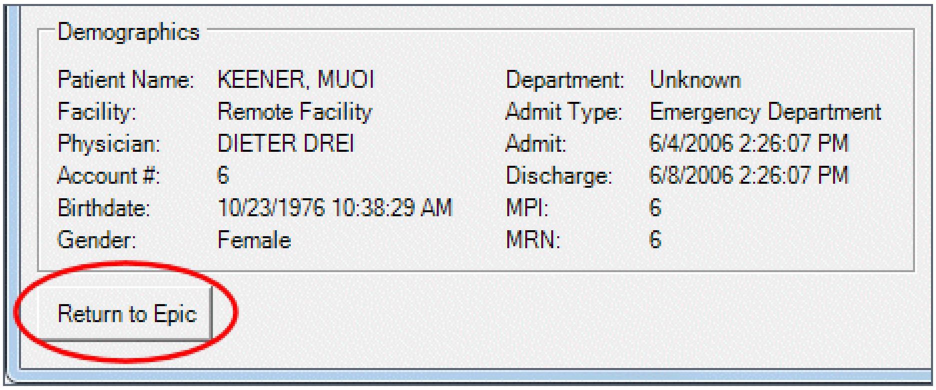


Deficiency Type	Description
Signature	Place this Deficiency Type on documents that require a physician's signature.
Missing Info	Place this Deficiency Type on documents that are missing required information. Physicians complete these deficiencies by typing out the required information. Once completed, the Missing Information deficiency is replaced with both the text the physician provided and the physician's signature.

3. Select **Click to Place Deficiency**. The button label changes to **Placing Deficiencies**, indicating the document viewer is in deficiency creation mode.

Note: This button is unavailable if the document is a patient-level document, which is shared with multiple encounters. Deficiencies can be placed only on encounter documents.

4. Place the deficiency on the document as described in one of the following procedures:
   - Placing a Signature Deficiency on page 278
   - Placing a Missing Information Deficiency on page 279
5. When you are finished creating deficiencies, click the **Return to Epic** button from the lower-left corner of the Analysis window.



Placing a Signature Deficiency

To place a Signature deficiency on a document, follow these steps:

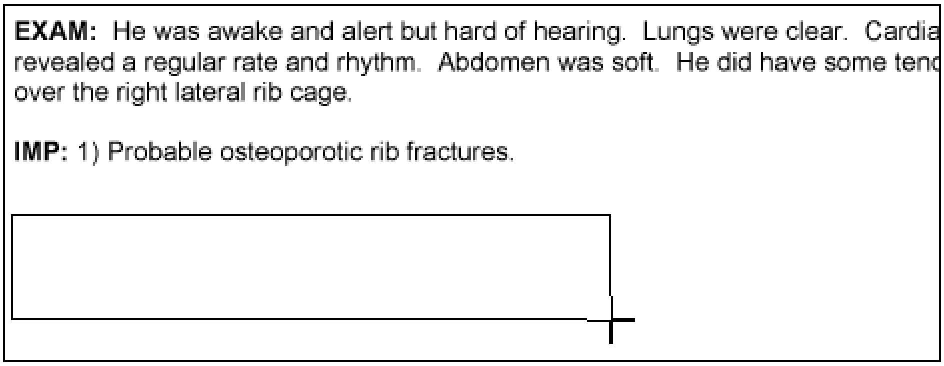
1. In the document viewer, click the location on the document where the physician's signature is required. OnBase adds a placeholder for the signature text and date signed, as shown below.

   - Depending on your system's settings, the physician's signature text may include the Physician Number.
   - Deficiencies placed on the right edge of a document are automatically rotated 90 degrees.
2. Continue adding deficiencies as described under Creating & Reassigning Deficiencies on page 277.

Placing a Missing Information Deficiency

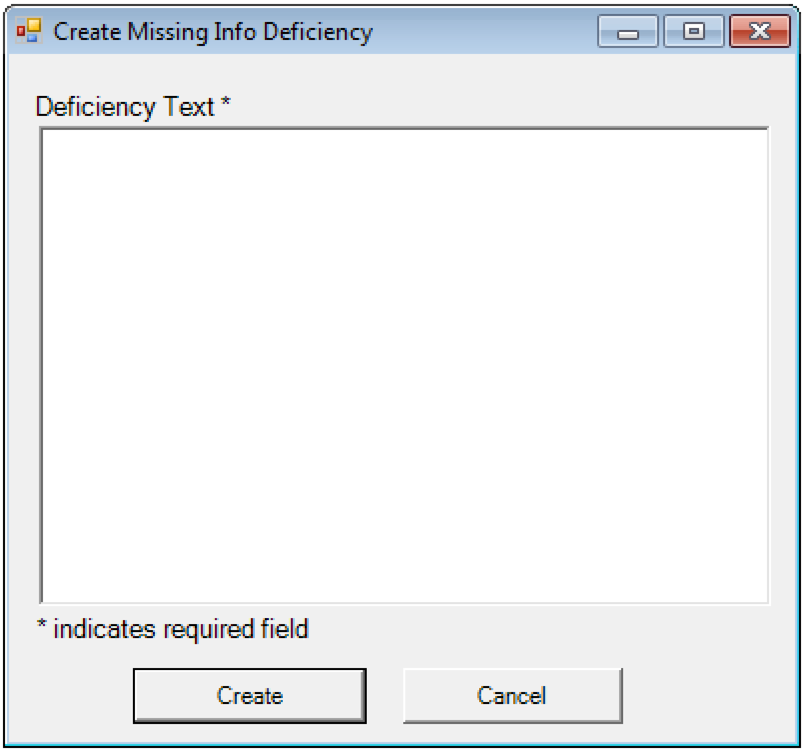
To place a Missing Information (**Missing Info**) deficiency on a document, follow these steps:

1. In the document viewer, click and drag the pointer over the area where the physician needs to add the required information.



- When a physician completes the deficiency, the text will be restricted to the width of this area; the height will vary depending on the amount of text the physician enters and the text in the physician's signature.
- Missing Information deficiencies have a minimum width. You cannot create a Missing Information deficiency smaller than the allowed minimum.

2. The **Create Missing Info Deficiency** dialog box is displayed.



3. In the **Deficiency Text** field, type a message describing the information needed. The physician will be able to read this message when addressing the deficiency.
4. Do one of the following:
   - Click **Create**. The Missing Information deficiency is created in the specified location on the document.
   - Click **Cancel** to cancel deficiency creation. The deficiency is removed from the document.
5. Continue adding deficiencies as described under Creating & Reassigning Deficiencies on page 277.

Moving Deficiencies

Before moving a deficiency, first make sure the document viewer is not in deficiency creation mode. If it is, click the **Placing Deficiencies** button. The button label changes to **Click to Place Deficiency**, indicating the viewer is not in creation mode.

When deficiency creation mode is off, you can click and drag a deficiency to a different location within the document viewer.

Deleting Deficiencies

You can delete a deficiency if it has not yet been signed by a physician. To delete a deficiency from the Analysis window:

1. Select a deficiency from the deficiencies table. To view the document where the deficiency is located, double-click the deficiency.
2. Click **Delete**. The deficiency is removed.

Searching for a Physician

You can search for physicians to assign to a deficiency by name, ID, or specialty.

See the following topics:

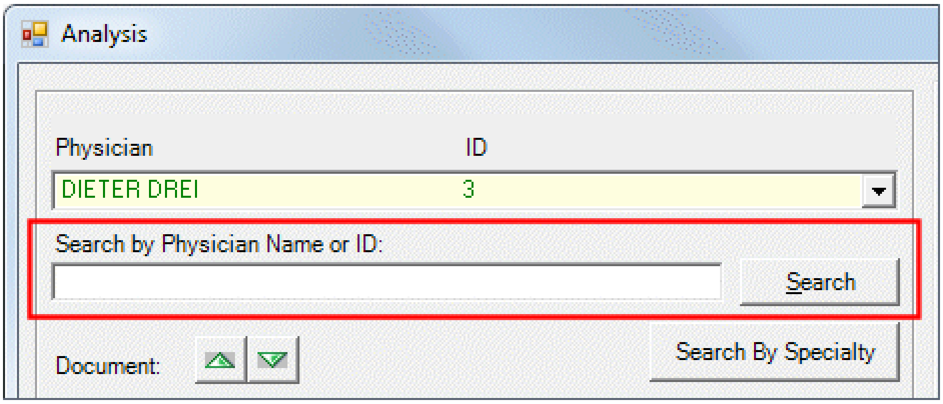
- Searching by Physician Name or ID on page 281
- Searching by Physician Specialty on page 282

Searching by Physician Name or ID

The search field allows you to quickly retrieve physicians by name or Physician ID. This method lets you find the physician more quickly than scrolling through all physicians in the **Physician** drop-down list.

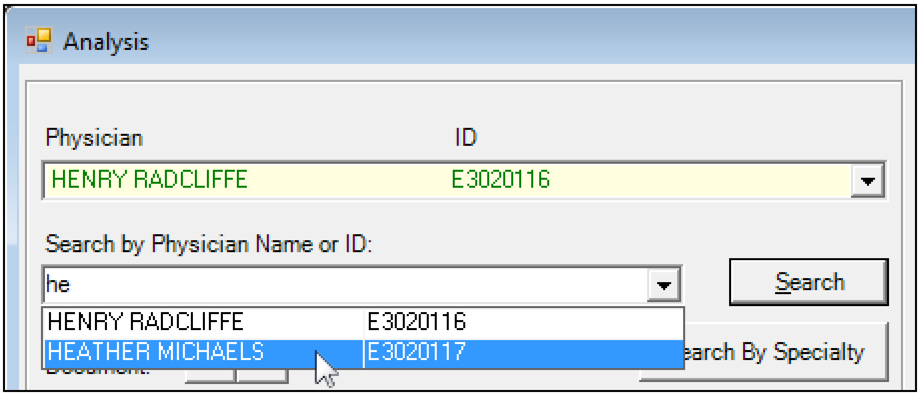
To search for a physician:

1. Click in the **Search by Physician Name or ID** field.



2. Type all or part of the physician's name or ID.

   Do not use wildcards. Signature Deficiencies for Epic will search all physician names and IDs for any text you enter; wildcards are not needed.
3. Click **Search**. The **Physician** drop-down displays the physician who most closely matches your criteria.
   - If there is an exact match, the physician who exactly matches your criteria is displayed.
   - If there are multiple matches, the **Search by Physician** drop-down displays all matching physicians in a drop-down.
4. If the correct physician was not selected initially, select the correct physician from the **Search by Physician** drop-down.

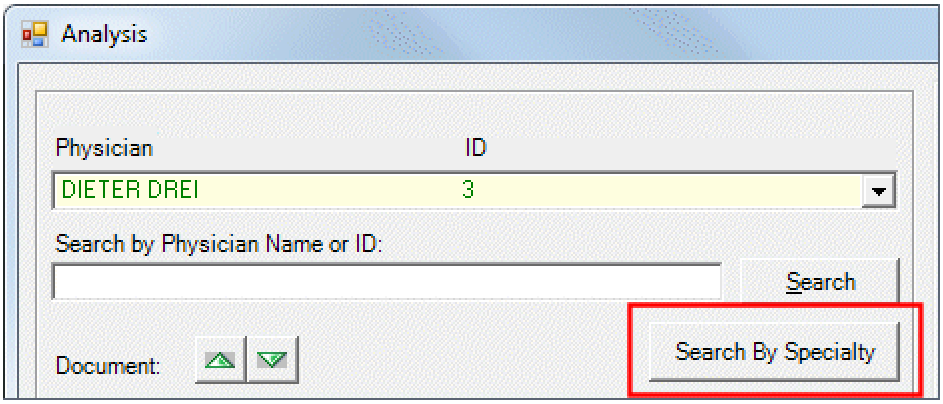


Searching by Physician Specialty

Depending on your system's setup, you may be able retrieve a list of physicians based on their names, IDs, or specialties. Depending on your system's configuration, this feature may be unavailable.

To search for a physician by specialty:

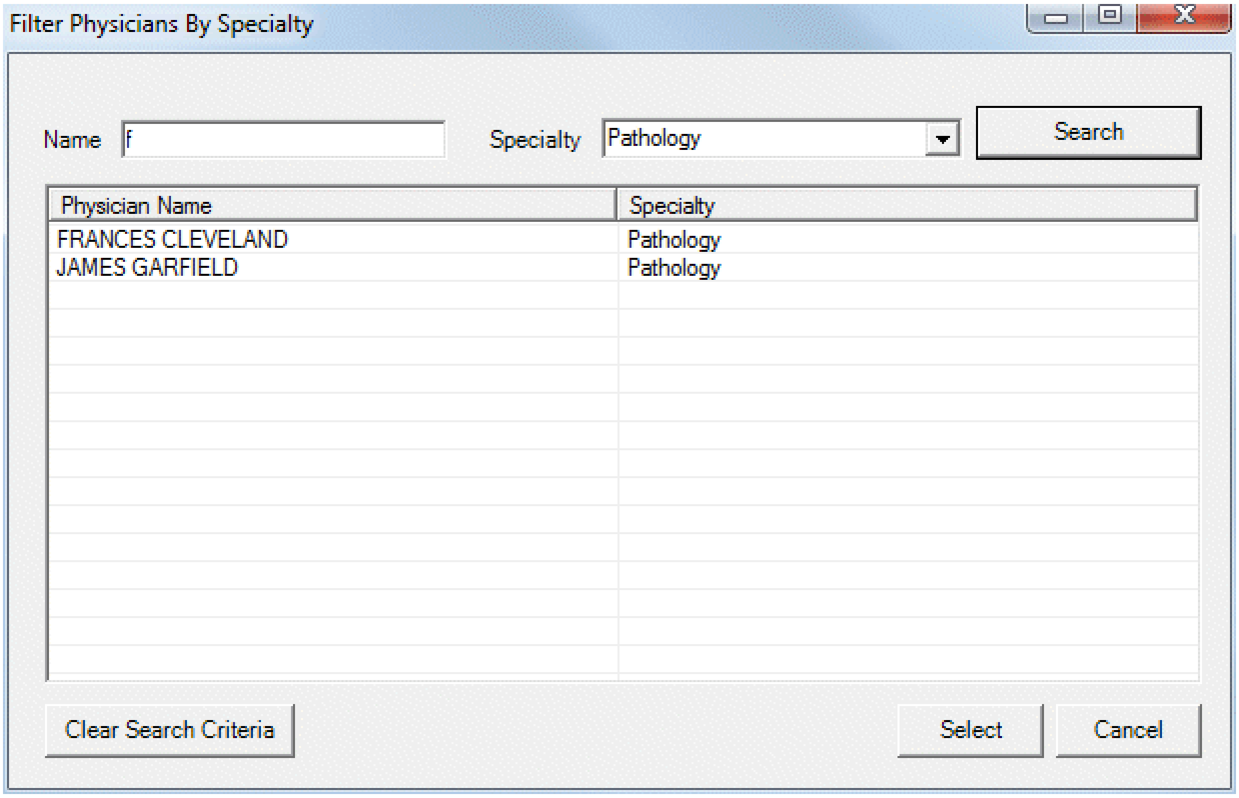
1. Click **Search By Specialty** to display the **Filter Physician By Specialty** dialog box.



2. Do one or both of the following:
   - In the **Name** field, type all or part of the physician's name or ID. Do not use wildcards.
   - From the **Specialty** drop-down, select the physician's specialty.

Tip: To clear the values you entered in these fields, click **Clear Search Criteria**.

3. Click **Search**. A list of physicians matching your search criteria is displayed.



4. Do one of the following:
   - Double-click the physician from the list.
   - Select the physician from the list, and then click **Select**.

   The **Physician** drop-down now displays the selected physician.

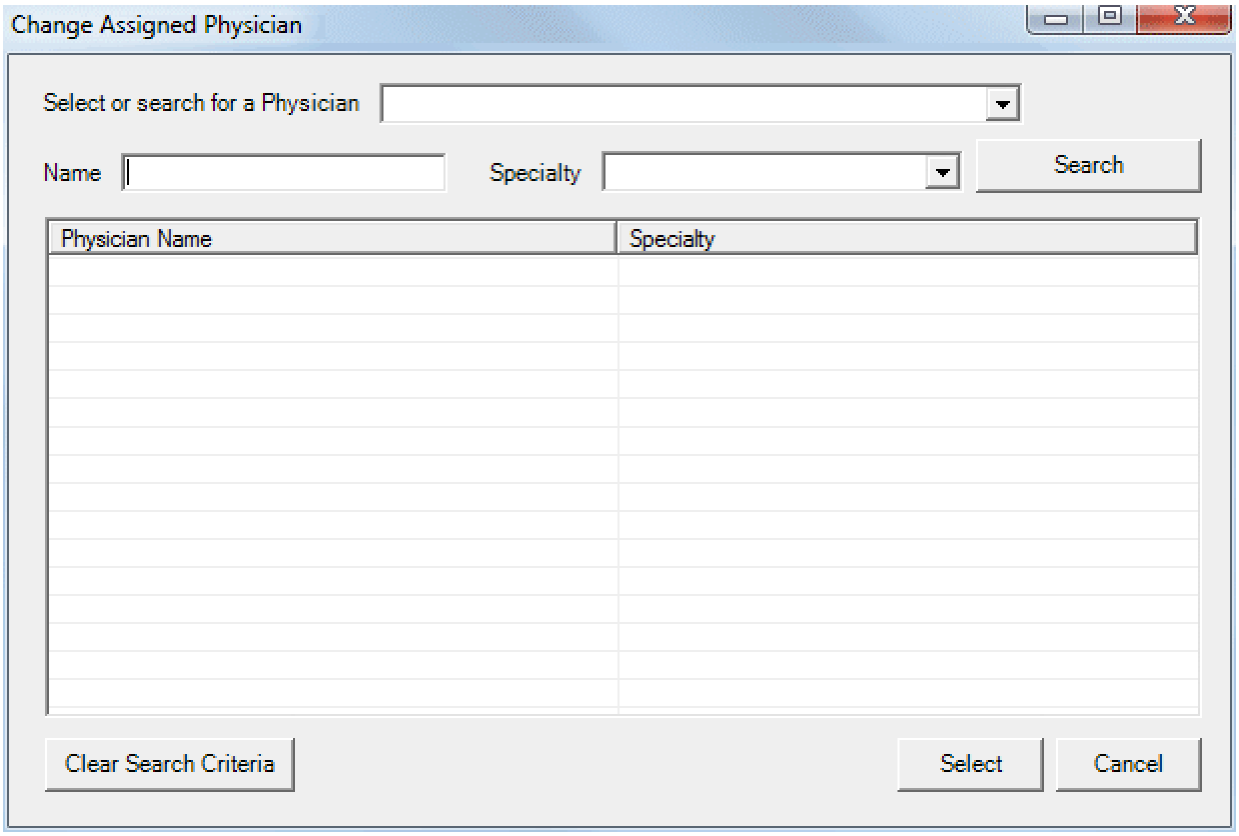
Changing the Assigned Physician

You can change the physician assigned to a deficiency, provided the deficiency has not been signed. For example, you may need to reassign a deficiency the original physician has declined.

Tip: If the original physician declined the deficiency, click **Show Reason Declined** to view the reason the deficiency was declined. The **Physician Response** message is displayed.

To update an unsigned deficiency from the Analysis window:

1. Select a deficiency from the deficiencies table. Double-click the deficiency to also view the document the deficiency was added to.
2. Click **Change Physician**. The **Change Assigned Physician** dialog box is displayed.



3. Do one of the following:
   - Select the appropriate physician from the drop-down.
   - Search by entering the physician's name or ID in the Name field and/or by selecting a specialty. Then, select the physician from the results list. See Searching by Physician Specialty on page 282 for more information about searching.
4. After selecting the physician, click **Select**. The deficiency has been reassigned.

Keyboard Shortcuts for Analysis

The following table describes keyboard shortcuts available from the Analysis window:

Shortcut Key	Description
Alt + S	Executes the physician search. This action is the same as clicking the **Search** button.
Alt + T	Toggles the **Click to Place Deficiency** button.

Shortcut Key	Description
Alt + R	Displays the **Physician Response** for the selected declined deficiency.
Alt + C	Displays the **Change Physician** dialog box for the selected deficiency.
Alt + D	Deletes the selected deficiency.
Alt + F4	Closes the Analysis window.

Keyboard shortcuts are available for navigating documents in the document viewer. For a description of these keyboard shortcuts, see Document Viewer Shortcuts on page 176.

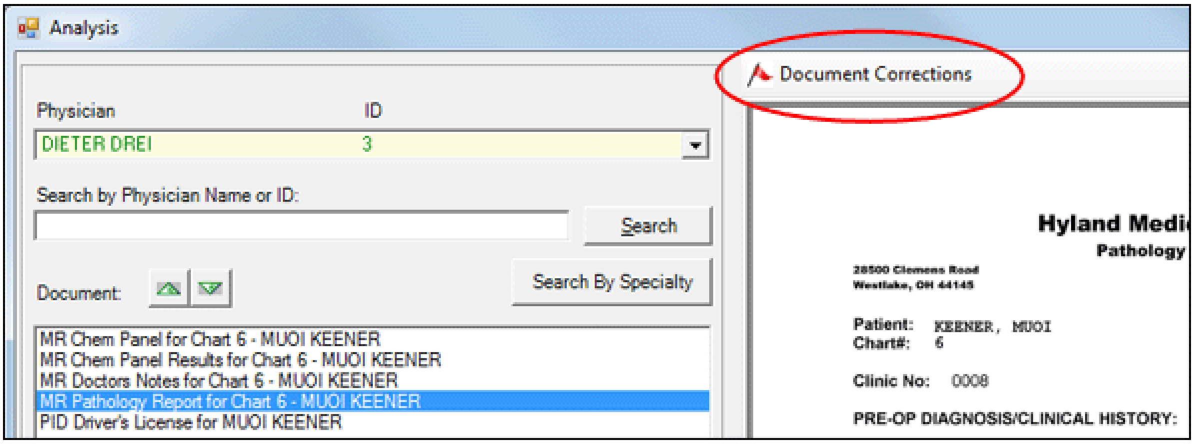
Submitting Documents for Correction

Depending on your system's configuration, the Analysis window may allow documents to be sent to OnBase Workflow, where they can be reviewed and routed for additional action.

The correction process may be used to address multiple types of issues, including the following:

- Documents are filed to the wrong Document Type, patient, or encounter
- Duplicate documents need to be deleted
- Pages need to be deleted
- Pages are out of order
- Pages need to be rotated
- Documents need to be split
- Document image quality is poor

If your system is set up for document corrections, one or more buttons are available in the toolbar above the viewer. Available buttons vary depending on your system's configuration.



Tip: For information about a button, rest your pointer over it. The button's help text is displayed. For additional information, contact your system administrator.

1. To execute a task, click a button. The document is added to the corresponding Workflow life cycle.
2. Do one of the following:
   - If a confirmation message is displayed, click **OK**. The document is sent to the life cycle and queue associated with the action.
   - If a form is displayed, continue to the next procedure: Completing a Correction Form on page 287.

Completing a Correction Form

If a form is displayed when you submit a document to Workflow, complete the following steps.

Note: If the document has already been submitted for corrections, the existing correction request is displayed in the right pane. Click the **Exit Split-Screen** button in the lower-left corner of the viewer to close the request form.

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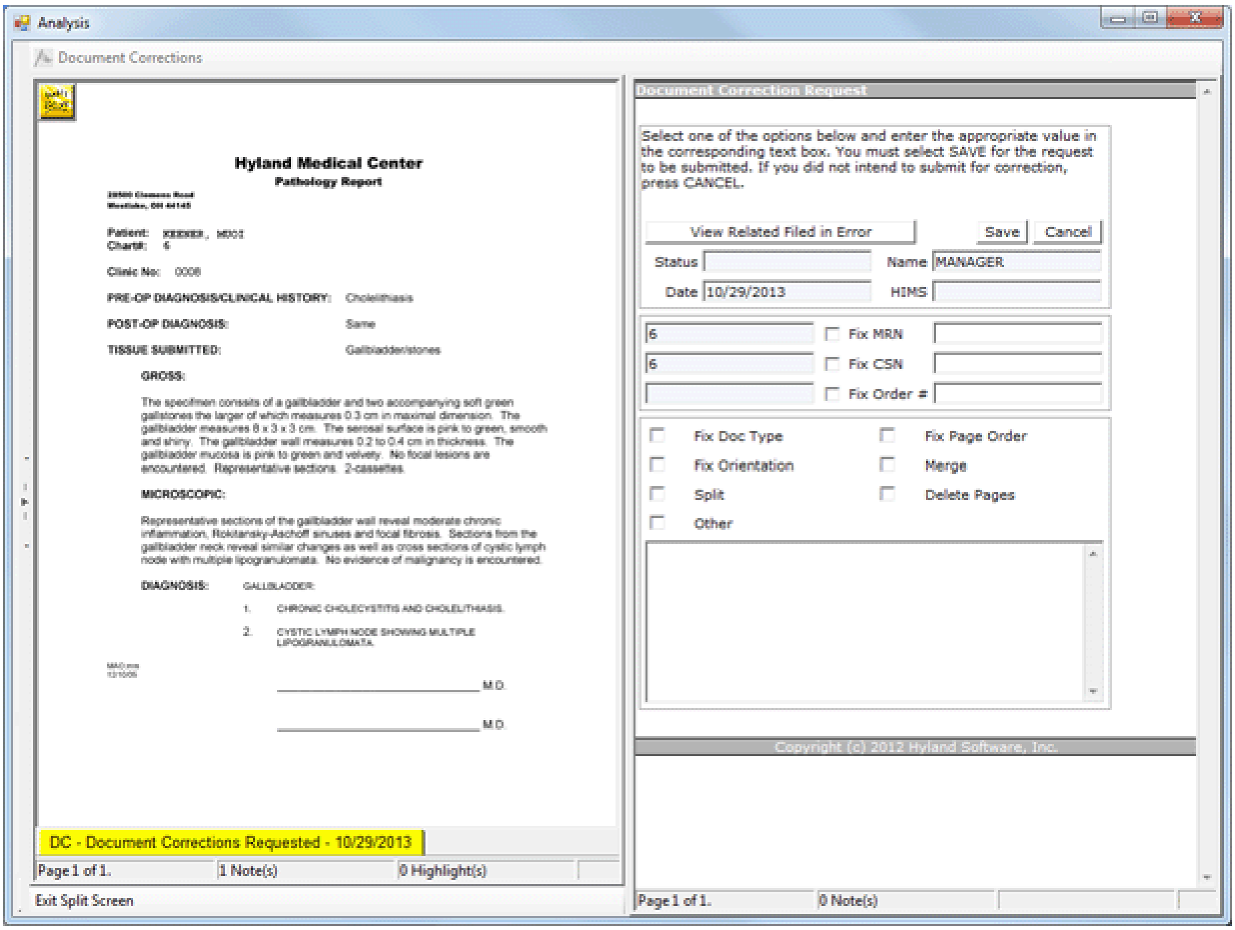
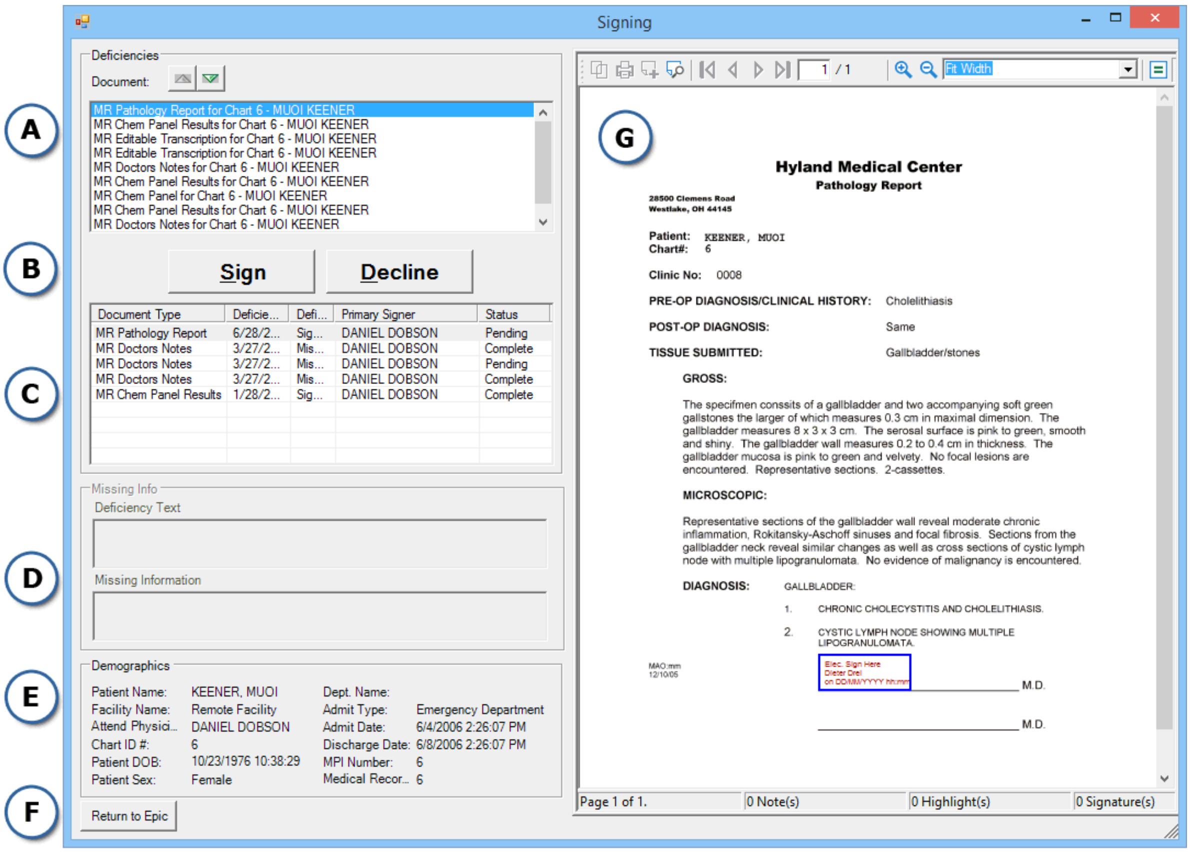
1. Fill out the form in the viewer's right pane. Clearly explain the reason you are submitting the document for correction.



2. Click the save or submit button on the form. A confirmation message is displayed.
3. Click **OK** to close the confirmation. The form and document are sent to OnBase Workflow.
4. If a correction note has been added to the document, you may be able to update the note text to describe your requested corrections. This note provides a visual indication that the document has been submitted for correction.

Completion

Physicians can electronically sign a deficiency by accepting it from the Signing window. The Signing window provides access to all OnBase documents tied to the patient's account. Physicians can access the Signing window by selecting a deficiency notification from the In Basket.



A. Document list
B. Sign/Decline buttons
C. Deficiency list
D. Missing Info pane
E. Demographics pane
F. Return to Epic button
G. Document viewer

For information about using the Signing window, see the following topics:

- Signing Window Components on page 289
- Completing Deficiencies on page 290

Signing Window Components

The Signing window's components are described in the following topics.

Document List

This list comprises encounter-related documents that are stored in OnBase. This list may be filtered to display only documents that require Analysis, depending on your system's configuration.

To view a document, select it from the list. You can click the **Previous** or **Next** buttons to navigate to the previous or next document in the list.

Sign / Decline Buttons

These buttons allow you to sign or decline the selected deficiency.

- Depending on the deficiency's type, the **Sign** button may be labeled **Sign** or **Accept**.
- When you click **Decline**, you must specify a reason for declining the deficiency.

See Completing Deficiencies on page 290 and Declining Deficiencies on page 292.

Deficiency List

This table lists and describes existing deficiencies on the document opened from the In Basket. Information includes the Document Type and the deficiency's creation date, type, assigned physician, and current status.

Double-click a deficiency from the list to display the deficiency in the document viewer.

Note: Depending on the number of documents it receives from Epic, the Signing window may list only deficiencies on a single document. To access deficiencies on other documents, click the corresponding deficiency notifications from the In Basket.

Missing Info Pane

The **Missing Info** pane is provided for Missing Information deficiencies. When you select a Missing Information deficiency, the **Deficiency Text** field displays the analyst's explanation for the deficiency. To complete the deficiency, you must type the requested information in the **Missing Information** field before clicking **Accept**. A maximum of 255 characters can be entered.

Demographics Pane

This section displays patient demographic and encounter information.

Return to Epic Button

This button allows you to close the Signing window and return to Epic after you finish addressing deficiencies.

Document Viewer

The document viewer displays the document. When you double-click a deficiency from the deficiencies table, the document viewer displays the document with the deficiency selected.

For information about using document viewer and its toolbars, see Document Viewer Usage on page 294.

Completing Deficiencies

For each document containing one or more deficiencies that require your attention, a notification arrives in your In Basket. If you have privileges to sign deficiencies for other physicians, you can access their deficiencies from your Epic Groups view.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

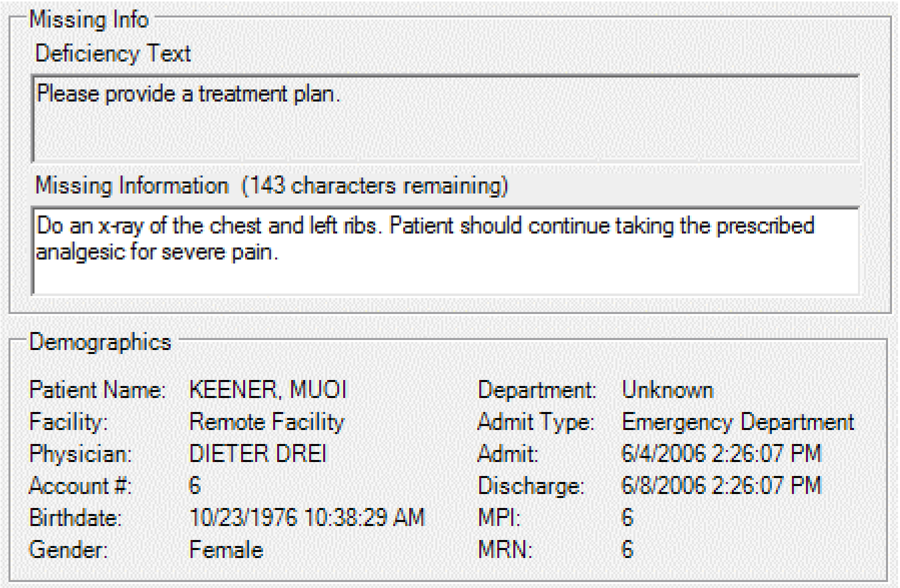
To sign a deficiency:

1. Select a deficiency from your In Basket. The Signing window displays the document with the assigned deficiencies.

Note: If the deficiency that triggered the notification has been deleted or completed, a message is displayed indicating no deficiencies remain to be signed.

2. Select the deficiency you want to sign from the deficiencies table or on the document.
3. Do one of the following:
    - For a Signature deficiency, click **Sign**. Your electronic signature replaces the deficiency on the document, and the deficiency is removed from the deficiencies table.

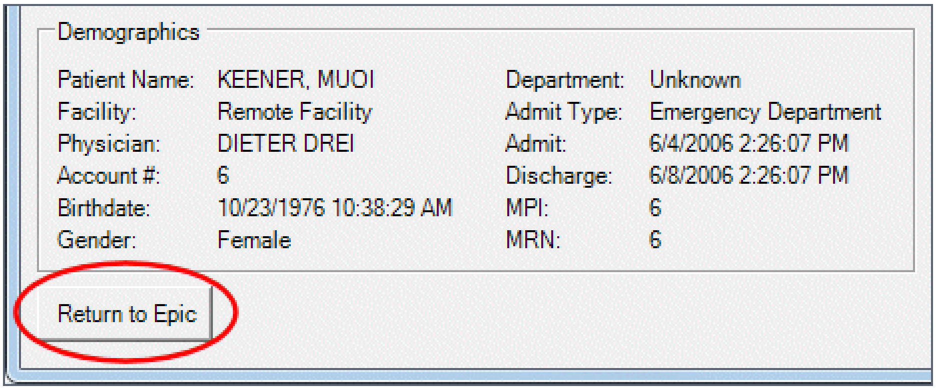
- For a Missing Information deficiency, do the following:
  - Read the analyst-provided explanation in the **Deficiency Text** field.
  - Then, type the requested information in the **Missing Information** field. A maximum of 255 characters can be entered.



  - Finally, click **Accept**. The information you provided replaces the Missing Information deficiency on the document, and your signature is applied automatically. The deficiency is removed from the deficiencies table.

If multiple deficiencies are listed, you can complete these deficiencies without closing the Signing window.

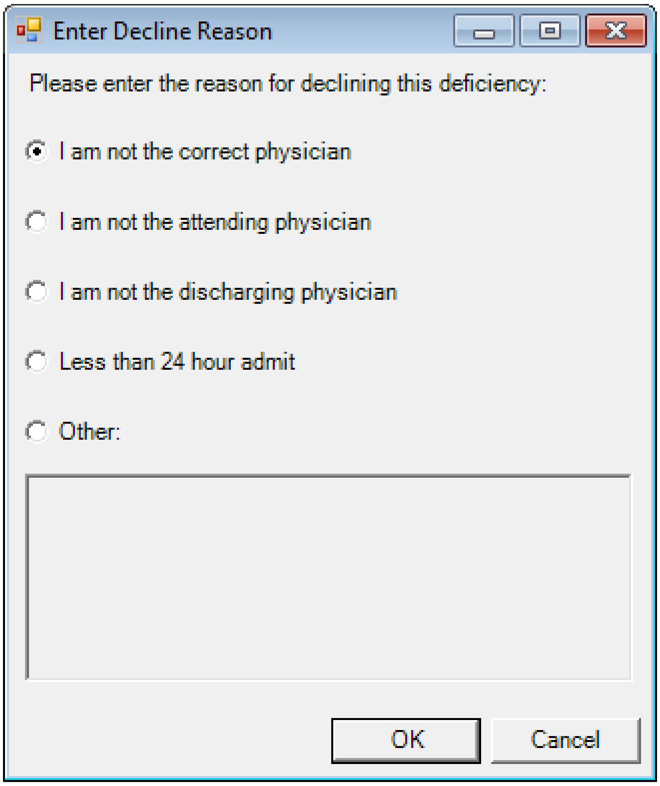
4. When your deficiencies are completed, click the **Return to Epic** button from the lower-left corner of the Signing window.



Declining Deficiencies

You can decline deficiencies from the Signing window. When you decline a deficiency, you must provide a decline reason.

1. From the deficiencies table in the Signing window, select the deficiency you want to decline.
2. Click **Decline**. The **Enter Decline Reason** dialog box is displayed.



3. Select a reason for declining the deficiency. Available options vary depending on your system's configuration.

   Depending on your configuration, you may be able to select **Other** and enter the reason in the field provided. If **Other** is unavailable, you must choose one of the reasons provided in the **Enter Decline Reason** dialog box.
4. Click **OK**.

Keyboard Shortcuts for Signing

The following table describes keyboard shortcuts available for addressing deficiencies in the Signing window:

Shortcut Key	Description
Alt + S	Signs the selected Missing Signature deficiency.

Shortcut Key	Description
Alt + A	Signs the selected Missing Information deficiency.
Alt + D	Declines the selected deficiency.
Alt + F4	Closes the Signing window.

Keyboard shortcuts are available for navigating documents in the document viewer. For a description of these keyboard shortcuts, see Document Viewer Shortcuts on page 176.

Document Viewer Usage

The following topics describe how to use the toolbars and right-click options available in the OnBase document viewer. Depending on your privileges, you may see different toolbars, icons, and other graphics that indicate the presence of notes or annotations.

Navigating Documents

Navigating documents in the OnBase Viewer and the OnBase Web Viewer can be done through toolbars and keyboard shortcuts specific to the type of viewer you have installed.

See the following sections for information specific to the OnBase Viewer:

- Document Viewer Shortcuts on page 295
- Toolbars in the Document Viewer on page 297
- Showing or Hiding Toolbars on page 298

See the following sections for information specific to the OnBase Web Viewer:

- Web Viewer Document Shortcuts on page 296

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

Shortcut	Action
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls position on the current page up.
Down Arrow	Slowly scrolls position on the current page down.
Right Arrow	Slowly scrolls position on the current page right.
Left Arrow	Slowly scrolls position on the current page left.
Ctrl + Page Up	Navigates to the top of the previous page.
Ctrl + Page Down	Navigates to the top of the next page.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
Ctrl + Home	Navigates to the top of the first page. **Note:** This function is not supported in the ActiveX Web Client.
Ctrl + End	Navigates to the top of the last page.
Ctrl + Up Arrow	Quickly scrolls up the current page.

Shortcut	Action
Ctrl + Down Arrow	Quickly scrolls down the current page.
Ctrl + Right Arrow	Quickly scrolls position on the current page right.
Ctrl + Left Arrow	Quickly scrolls position on the current page left.

Zooming In and Out

The following keyboard functions allow you to zoom in and out while viewing a document.

Shortcut	Action
+ (on numeric keypad)	Zooms in.
- (on numeric keypad)	Zooms out.
Ctrl + mouse wheel	Zooms in and out.

Searching for Internal Text

The following keyboard shortcuts are available for the Internal Text Search toolbar when the cursor is in the **Search String** field. These shortcuts are not available if you are using the **Find Next** and **Find Previous** buttons.

Shortcut	Action
Enter	Starts the search or finds the next instance of the text if the search is in progress.
Shift + Enter	Finds the previous instance of the text.

Note: Shortcut keys do not work when the cursor is positioned over a thumbnail and Thumbnail Zoom is enabled.

Web Viewer Document Shortcuts

The following keyboard shortcuts are available while viewing documents in the Web Viewer, in addition to the list of shortcuts in the previous sections.

Shortcut	Function
Page Up	Quickly scrolls up the current page. At the beginning of a page in a multi-page document, scrolls to the previous page.

Shortcut	Function
Page Down	Quickly scrolls down the current page. At the end of a page in a multi-page document, scrolls to the next page.
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.
Ctrl + N	Display the **Add Note** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + Shift + N	Display the **View Notes** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + P	Displays the **Print** dialog box.
Ctrl + W	Initiate a cross-reference from the current document.

Toolbars in the Document Viewer

The Document Viewer can be configured to display any combination of the following toolbars. Depending on your system configuration, one or more of these toolbars may be disabled or turned off by default.

- The **Viewer Control** toolbar offers buttons for navigating within the current document, resizing and reorienting its pages, printing the document, and accessing document options. The **Viewer Control** toolbar is almost always displayed. This toolbar's default position is immediately above the document display area.
- The **Text Search** toolbar provides buttons for searching the document for a specified text string. The **Text Search** toolbar is typically available for documents with a text report format. This toolbar's default position is the top of the document display area, above all other toolbars.
- The **Column/Row Locking** toolbar enables you to lock columns and rows in place so that they will still be viewable when you scroll through the document. The **Column/Row Locking** toolbar is typically available for documents with a text report format. This toolbar's default position is under the **Text Search** toolbar.
- The **Pages** toolbar controls the display of thumbnails of the document pages. This toolbar's default position is to the right of the document display area.

- The **Notes** toolbar offers access to notes attached to a document. The **Notes** toolbar is available only if the document has any notes. The toolbar is displayed along the bottom of the Document Viewer.
- The **Annotations** toolbar allows you to create annotations and redactions on documents. This toolbar's default position is at the top of the document, immediately above the **Viewer Control** toolbar.

Tip: Drag toolbars to different positions to customize the interface. To move a toolbar, position your pointer over the vertical bar on the left side of the toolbar. Then, click and drag the toolbar to its new position.

Showing or Hiding Toolbars

You can set the default behavior of toolbars to show or hide.

1. Right-click on the header or the footer of the Document Viewer or the **Pages** toolbar.
2. Select **Toolbars** to display the toolbars that are available for the current document.
   - Viewer Control
   - Text Search
   - Column/Row Locking
   - Pages
   - Annotations
   - Notes List
   - Notes
3. Select an option to toggle the toolbar to **Show** (checked) or **Hide** (not checked).

Note: Some toolbars are Document Type-specific. For example, **Text Search** and **Column/Row Locking** are only available for text-based documents.

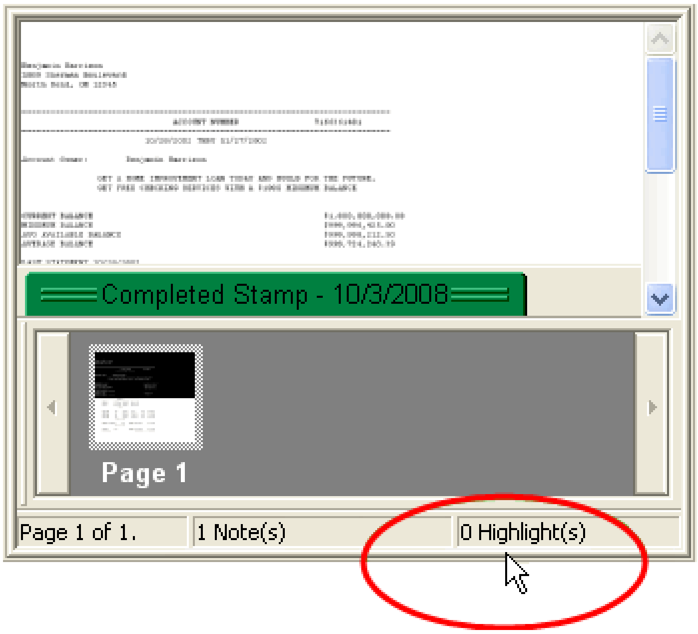
Auto-Hide Toolbars

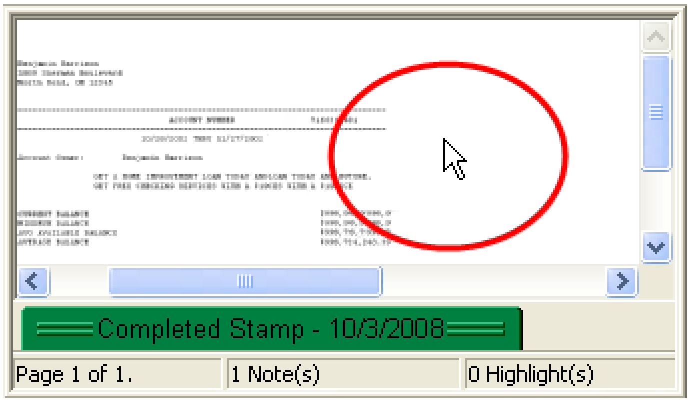
Auto-Hide provides the ability to hide toolbars until you position your pointer over their display area.

1. Ensure the toolbar you wish to Auto-Hide is set to show.
2. Right-click on the toolbar to toggle Auto-Hide on or off for the toolbars that display in that area:
   - Right-click in the **Viewer** header to toggle Auto-Hide on or off for the toolbars that display in the header (Viewer Control, Annotations, Text Search and Column/Row Locking, Notes List).
   - Right-click in the **Notes** toolbar to toggle Auto-Hide on or off for the **Notes** toolbar.
   - Right-click in the **Pages** toolbar to toggle Auto-Hide on or off for the **Pages** toolbar.

3. When Auto-Hide is active, toolbars are displayed when you place the pointer over their display areas.

   In the example below, notice the **Pages** toolbar is displayed when the pointer is placed over the **Pages** toolbar display area. The **Pages** toolbar is hidden when the pointer is not over the **Pages** toolbar display area.





Viewer and Web Viewer Toolbars

There are different toolbars available in the OnBase Viewer and OnBase Web Viewer. Toolbar buttons are designed to make navigation and document management an easy, point-and-click operation. The toolbars that are available to you differ based on which viewer you have installed. If you are unsure of which viewer you are using, contact your system administrator for information.

See the following sections to learn about the toolbars that are available to you for based on your installed viewer.

- Viewer Toolbars on page 300
- Web Viewer Toolbars on page 303

Viewer Toolbars

See the following topics for more information on toolbars used in the OnBase Viewer.

- Viewer Control Toolbar on page 300
- OLE/PDF Viewer Toolbar on page 302

Viewer Control Toolbar

The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Button	Description
	Overlay applies an overlay to the document, if an overlay is present.
	Print displays the **Print** dialog box, if you have user rights to print the document.
	Add Note displays the **Add Note** dialog box, which displays note types you can add to the document.
	View Note displays the **View Note** dialog box, which displays a list of all notes on the document.
	First Page displays the first page of the document.
	Previous Page displays the preceding page of a multi-page document.
	Next Page displays the following page of a multi-page document.
	Last Page displays the last page of the document.

Button	Description
2 / 3	Enter a page number in the **Go To Page** field to jump directly to a specific page.
	Zoom In magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	Zoom Out reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
25%	**Sizing** options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size. Also displays the current magnification percentage whenever the **Scale | Zoom In** or the **Scale | Zoom Out** options are chosen in the right-click menu for the open document.
	Actual Size displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. **Note:** This zoom level differs from True Size, which takes the monitor's and image's DPI into account when displaying the image.
	Fit Width resizes the document page so that its width is the same as the width of the document display area.
	Fit Window resizes the document page so that the entire page is displayed in the document display area.
	Fit Height resizes the document page so that its height is the same as the height of the document display area.
	Rotate Left rotates the document 90 degrees counterclockwise.
	Rotate Right rotates the document 90 degrees clockwise.
	Options enables you to set viewer options.
	Scale to Gray softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
	Magnify turns the cursor into a magnifying glass that you can place over an area in a document. The area is displayed at 200% zoom in a separate view window next to the magnifying glass.

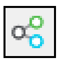
Button	Description
	Show Alternate Rendition is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click the black arrow. Select the rendition you want to view from this list.

OLE/PDF Viewer Toolbar

The OLE/PDF Viewer toolbar is available for OLE documents, PDF documents, HTML documents, and E-Forms.

Available buttons are described in the following table. Some buttons may be unavailable depending on your privileges, system licensing, and third-party PDF viewer.

Button	Description
Add Note	Displays the **Add Note** dialog box, which displays note types you can add to the document.
View Note	Displays the **View Note** dialog box, which displays a list of all notes on the document.
Keywords	**Keywords** displays the **Add/Modify Keywords** dialog box, allowing you to edit the document's Keyword Values.
Print	Displays the **Print** dialog box. **Note:** The **Print** button is not displayed if a third-party PDF reader is installed other than Adobe Acrobat Reader. You can print only by right-clicking the PDF document and selecting **Print** from the right-click menu.
Document Properties	Displays the **Document Information** dialog box, which contains system information about the document.
Cross-References	Displays all documents that are cross-referenced to the document.

Button	Description
Document History 	Displays the document's history, which includes all actions that have been performed on a document.
Workflow Queues 	Displays the document's Workflow life cycles and the queues where it currently resides. This option is available only for systems licensed for Workflow.
Show Alternate Rendition 	This button is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click the black arrow. Select the rendition you want to view from this list.

Web Viewer Toolbars

See the following topics for more information on toolbars used in the OnBase Web Viewer.

- Web Viewer Control Toolbar on page 303
- Web Viewer PDF and OLE Document Viewer Toolbar on page 306
- Web Viewer Pages Toolbar on page 308

Web Viewer Control Toolbar

The Web Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Note: A different toolbar is displayed when you are viewing PDF or OLE documents. See Web Viewer PDF and OLE Document Viewer Toolbar on page 306 for information about the toolbar that is displayed when you view PDF or OLE documents.

Button	Description
Print 	Displays the **Print** dialog box, if you have user rights to print the document.

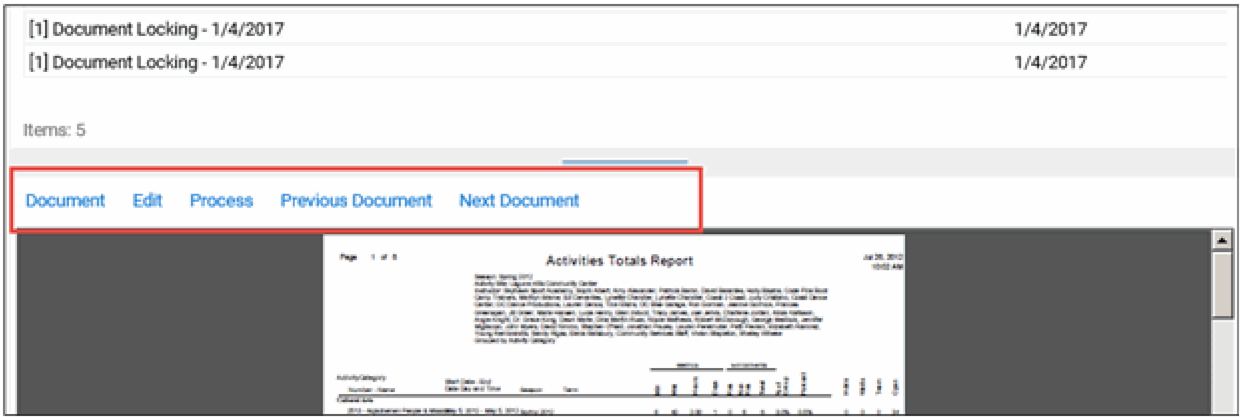
Button	Description
Overlay	Applies an overlay to the document, if an overlay is present.
First Page	Displays the first page of the document.
Previous Page	Displays the preceding page of a multi-page document.
Next Page	Displays the following page of a multi-page document.
Last Page	Displays the last page of the document.
Zoom In	Magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
Zoom Out	Reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
Actual Size	Displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. **Note:** This zoom level differs from True Size, which takes the monitor’s and image’s DPI into account when displaying the image.
Fit Width	Resizes the document page so that its width is the same as the width of the document display area.
Fit Height	Resizes the document page so that its height is the same as the height of the document display area.
Fit in Window	Resizes the document page so that it completely fits the document display area.

Button	Description
Rotate Counterclockwise	Rotates the document 90 degrees counterclockwise.
Rotate Clockwise	Rotates the document 90 degrees clockwise.
Show Alternate Rendition	Available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click this button. Select the rendition you want to view from this list.
Text Search	Allows you to search for specific text strings within the document. For more information, see Internal Text Search Toolbar on page 317.
Generate Report	Allows you to generate a system report of internal text search results. For more information, see Internal Text Search Toolbar on page 317.
Toggle Annotation	Enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again. For more information, see HTML Web Client Annotations Toolbar on page 308.
Scale to Gray	Softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
Options	Enables you to set viewer options.

Web Viewer PDF and OLE Document Viewer Toolbar

When you view PDF or OLE (Office) documents in the Web Viewer, a toolbar like the one shown below is displayed.

Note: When viewing OLE documents, this toolbar is only displayed when the Web Viewer is integrated with a Microsoft Office Online Server or Office for the web (Office 365). For more information, see your system administrator.



This toolbar provides you with many of the existing right-click menu options that are available for image and text documents, since the OnBase right-click menu is not accessible when viewing these documents.

Note: PDF and OLE documents are read-only when viewed within the Web Viewer.

The following menus and options are available in the PDF and Office document viewer toolbar:

Button	Description
Document	The following items are available in the **Document** menu: • **Properties** Displays the document properties for the open document. • **History** Displays the document history for the open document. • **Cross-References** Displays all documents that are cross-referenced to the open document. • **Revisions / Renditions** Displays the revisions or renditions of the document, if the document type has revisions or renditions. • **Show Folder Locations** Displays the folders where this document resides. • **View in Native Application** Displays the document in its native application. **Note:** The **View in Native Application** option is only available when viewing OLE documents. This option is only available if the Web Viewer is integrated with Microsoft Office Online Server or Office for the web (Office 365). For more information, see your system administrator.
Edit	The following items are available in the **Edit** menu: • **Re-Index** Displays the Re-Index window for the open document. • **Keywords** Displays the Keywords window for the open document. • **Notes** Displays the Notes dialog for the open document.
Process	This menu contains options that apply to Workflow and WorkView. For descriptions of these menu items, refer to the **Workflow** and **WorkView** help files or module reference guides.
Previous Document	Click the **Previous Document** button to navigate to the next document in the list.
Next Document	Click the **Next Document** button to navigate to the next document in the list.

Note: If an Office Business Application (OBA) is installed, you may be prompted to edit the document in its native application.

HTML Web Client Annotations Toolbar

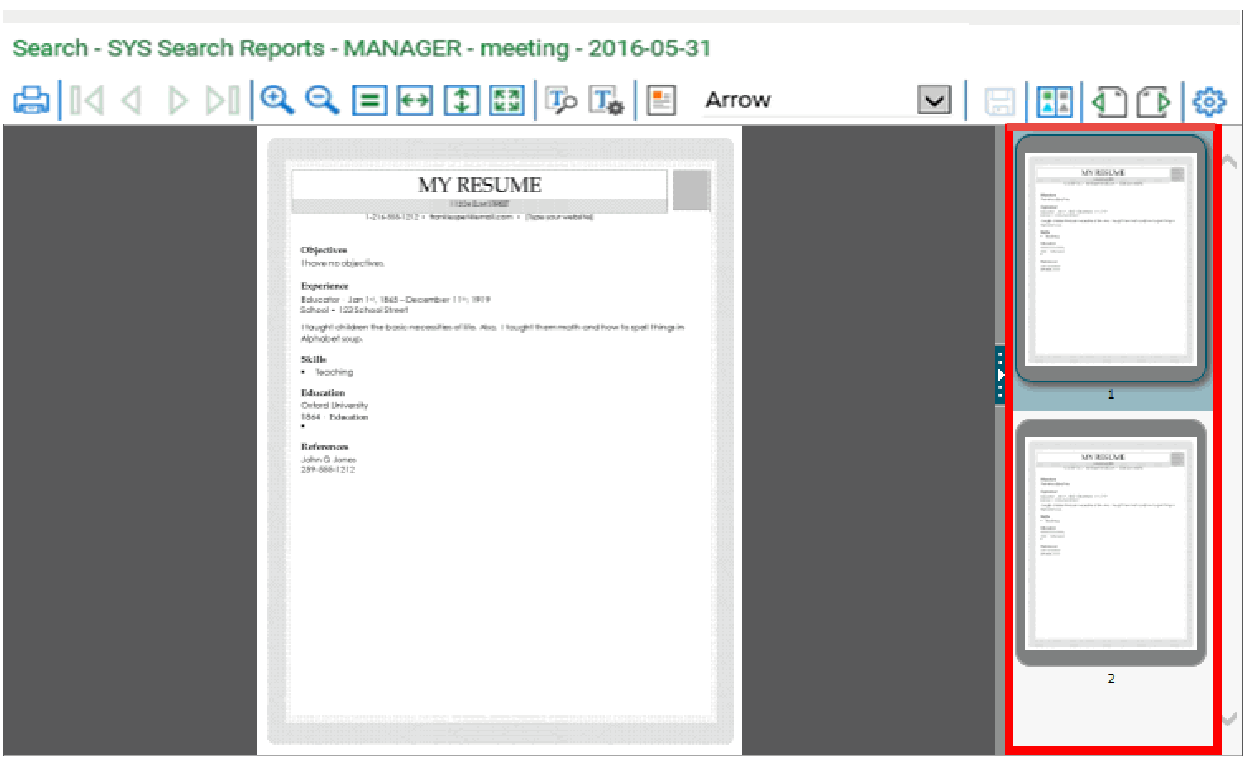
The Annotations toolbar allows you to draw annotations or redactions on a document.

Note: If you are viewing a document that is locked by Records Management, the Annotations Toolbar is also locked and cannot be used.

For information on creating annotations in the OnBase Web Viewer, see Creating Annotations in the HTML Document Viewer on page 187.

Web Viewer Pages Toolbar

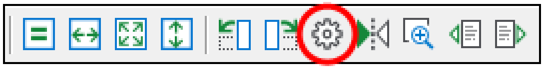
Document Thumbnails are miniature representations of the document pages, which provide a method of document navigation. Document Thumbnails display in the Pages toolbar window in the OnBase Web Viewer.



You can easily navigate between the pages of a document by selecting a page in the pages toolbar.

Options Button - OnBase Viewer Options

The **Options** button in the Viewer Control toolbar allows you to set the default behavior for the user interface of the Document Viewer.



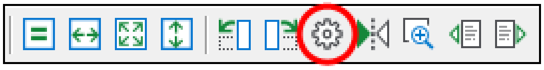
Use the **Options** button to set the following items:

- Thumbnail size
- Thumbnail zoom behavior
- Auto-scroll preferences
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior
- Zoom region preferences
- Blank page display preferences
- Connection timeout preferences

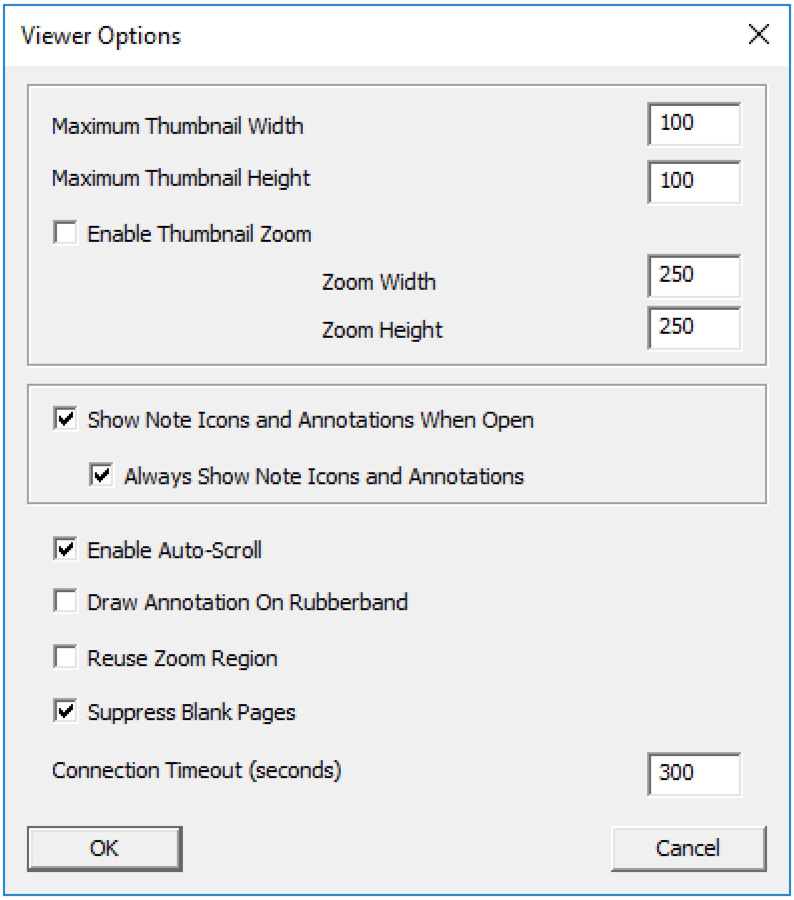
Changing Thumbnail Size

The size of thumbnails is determined by their maximum pixel width and maximum pixel height. Because the height/width aspect ratio can vary substantially from document to document, OnBase automatically chooses either the maximum height or the maximum width, depending on which one allows the other to be displayed in full, and then calculates the other dimension.

1. Click the **Options** button in the **Viewer Control** toolbar.



The **Viewer Options** dialog box is displayed.



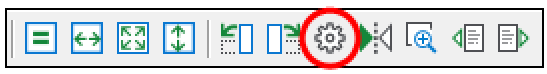
2. In the **Maximum Thumbnail Width** field, type the number of pixels that defines the maximum width for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be wider than 100 pixels. You can specify any width from 32 pixels through 160 pixels.

3. In the **Maximum Thumbnail Height** field, type the number of pixels that defines the maximum height for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be taller than 100 pixels. You can specify any height from 32 pixels through 160 pixels.
4. Click **OK** to save your changes and close the page. OnBase immediately resizes the thumbnails in the **Pages** toolbar.

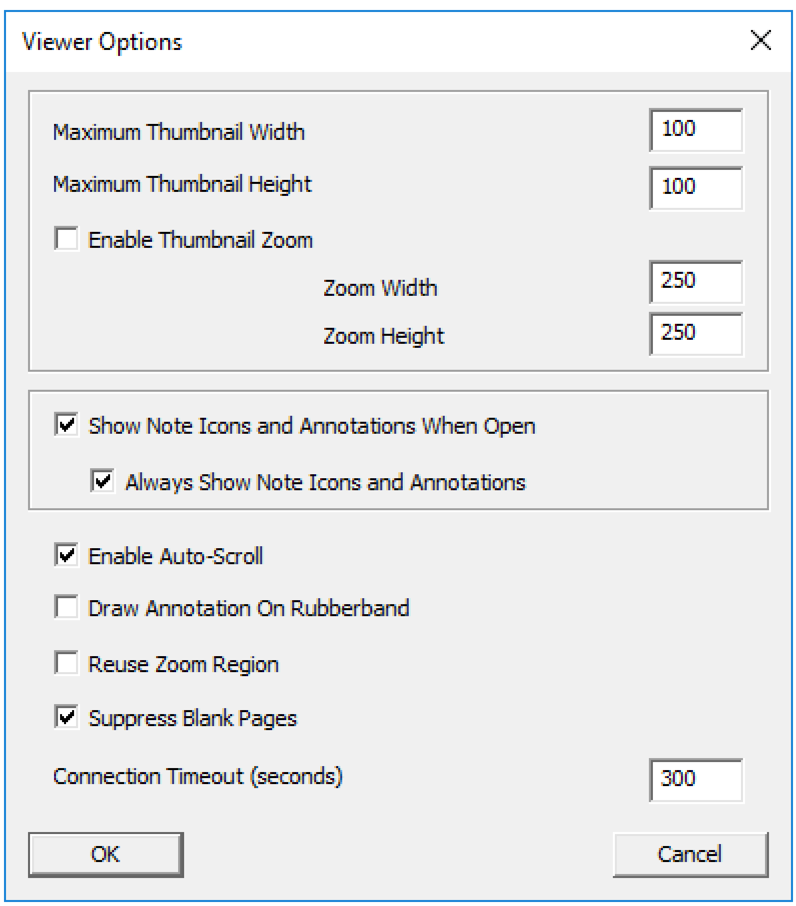
Change Zoomed Thumbnail Size

When a thumbnail is zoomed, its width and height are expanded to a specified percentage of the original thumbnail width and height. To maintain the original aspect ratio, the zoom percentage should be the same for both width and height. If the percentages are different, OnBase automatically compensates by selecting the dimension that has the lower percentage, and adjusting the other dimension to preserve the original aspect ratio.

1. Click the **Options** button in the **Viewer Control** toolbar.



The **Viewer Options** dialog box is displayed.

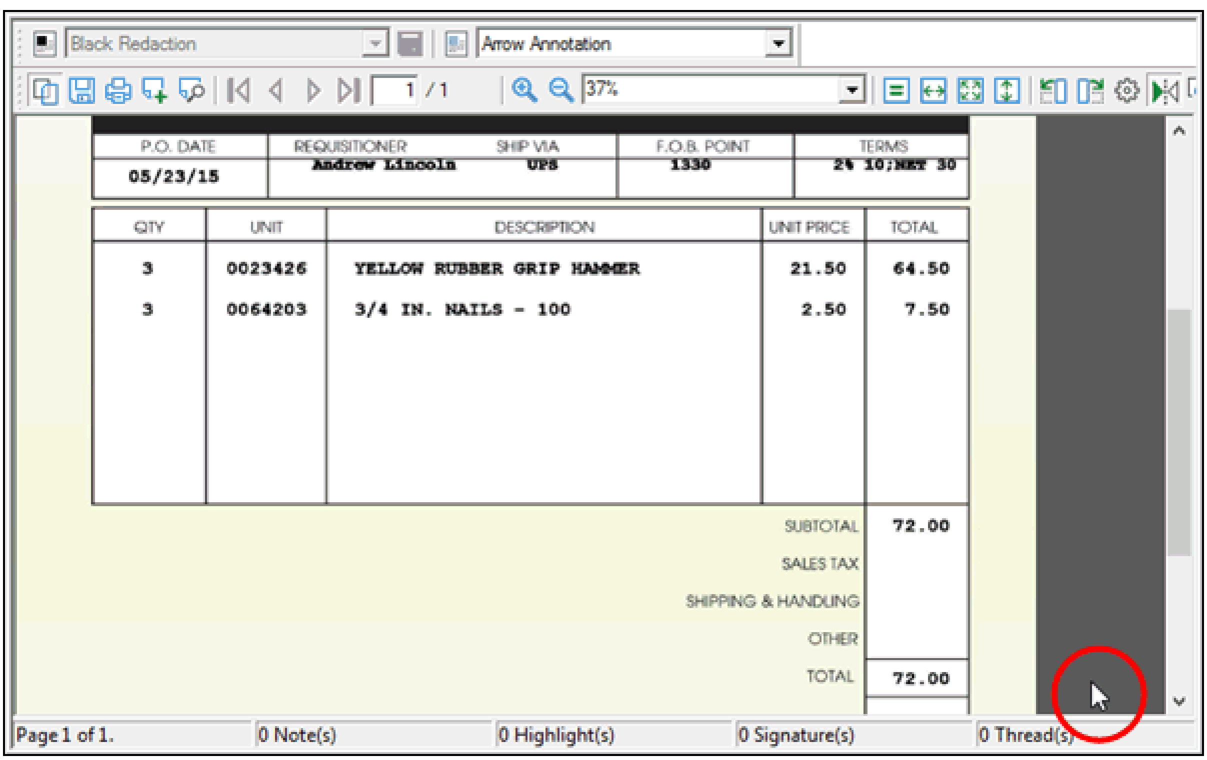


2. Select the **Enable Thumbnail Zoom** check box if you want thumbnails to be magnified to the specified dimensions whenever you place your pointer over them. Clear the check box if you want thumbnails to remain the same size.
3. In the **Zoom Width** field, type the maximum width in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.
4. In the **Zoom Height** field, type the maximum height in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.
5. Click **OK** to save your changes and close the page. OnBase immediately changes the dimensions for zoomed thumbnails. The next time you hover your mouse pointer over a thumbnail, it will be zoomed to the new size.

Enable Auto-Scroll

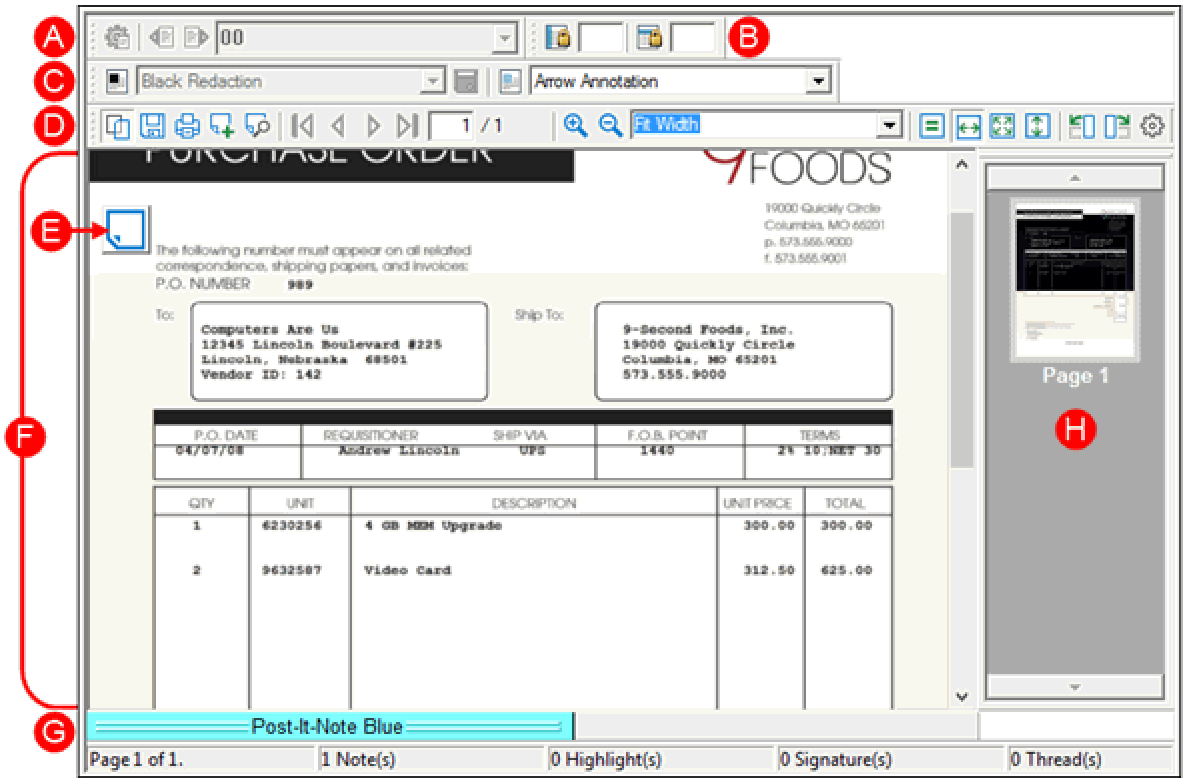
Select this option to enable auto-scrolling on documents. Auto-scrolling allows you to place the pointer at the edge of the viewer and scroll through the document vertically or horizontally. For example, to scroll down, you would place the pointer at the bottom of the viewer.

When this option is not selected, you must use the scrollbars or the mouse wheel to scroll through the document.



Display Options for Notes and Annotations

You can choose whether note or annotation icons are displayed on documents all the time, or only when the note's or annotation's tab is selected in the **Notes** toolbar.



Section	Description
A	Text Search Toolbar
B	Column/Row Locking Toolbar
C	Annotation Toolbar
D	Document Viewer Toolbar
E	Note Icon
F	Open Document
G	Notes Toolbar with Note
H	Pages Toolbar (contains thumbnails)

Show Note Icons and Annotations When Open

Select this option to allow annotations and note icons to be displayed on documents. When this option is not selected, annotations and note icons are not displayed on the document, even when the corresponding note is open.

Always Show Note Icons and Annotations

Select this option to always display annotations and note icons on documents. When this option is not selected, annotations and note icons are displayed only when the corresponding note is open. This option is unavailable if **Show Note Icons and Annotations When Open** is not selected.

Draw Annotation On Rubberband

Select to create annotations using the Rubber Band feature. This option allows you to create annotations without clicking the **Toggle Annotation** button.

When this option is selected, you can create annotations by pressing **Ctrl** as you click and drag the pointer across the document. When this option is not selected, you must click the **Toggle Annotation** button before drawing the annotation on a document.

Retaining the Zoom Region from Page to Page

By default, when the viewer displays a new page, the zoom level is retained, but the zoom region is reset to display the page's upper-left corner. Viewer options can be modified so that the region displayed in the viewer is retained from page to page. For example, if you are viewing the lower-right corner of a page, clicking the **Next Page** button will display the lower-right corner of the next page.

To retain zoom regions from page to page and document to document, select the **Reuse Zoom Region** option in the **Viewer Options** dialog box.

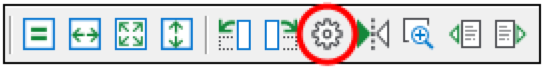
Suppressing Blank Pages

Depending on a document's configuration, you may be able to suppress the viewing of blank page thumbnails in the **Pages** toolbar. When this option is enabled, the thumbnails of pages that were marked as blank will not be displayed in the **Pages** toolbar.

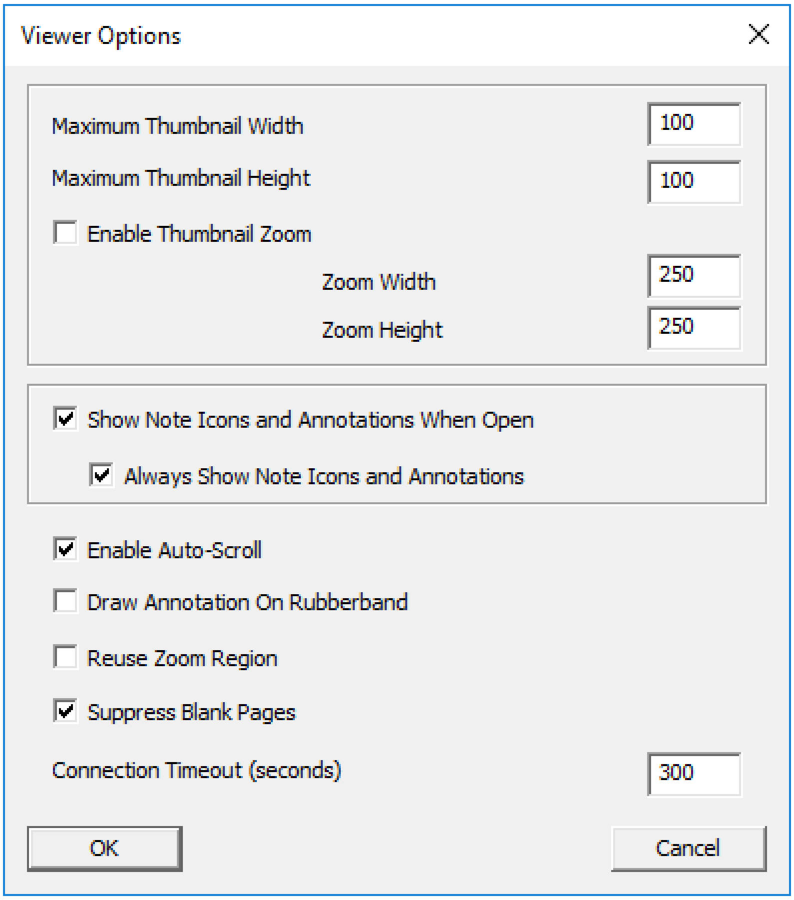
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

1. Click the **Options** button in the **Viewer Control** toolbar.



The **Viewer Options** dialog box is displayed.

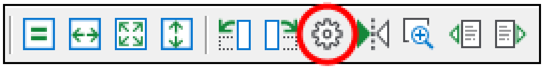


2. Select the **Suppress Blank Pages** check box. Clear the check box if you want the blank pages to remain in the **Pages** toolbar.
3. Click **OK** to save your changes. OnBase immediately changes the display of the thumbnails in the viewer based on whether or not the **Suppress Blank Pages** option is enabled or disabled.

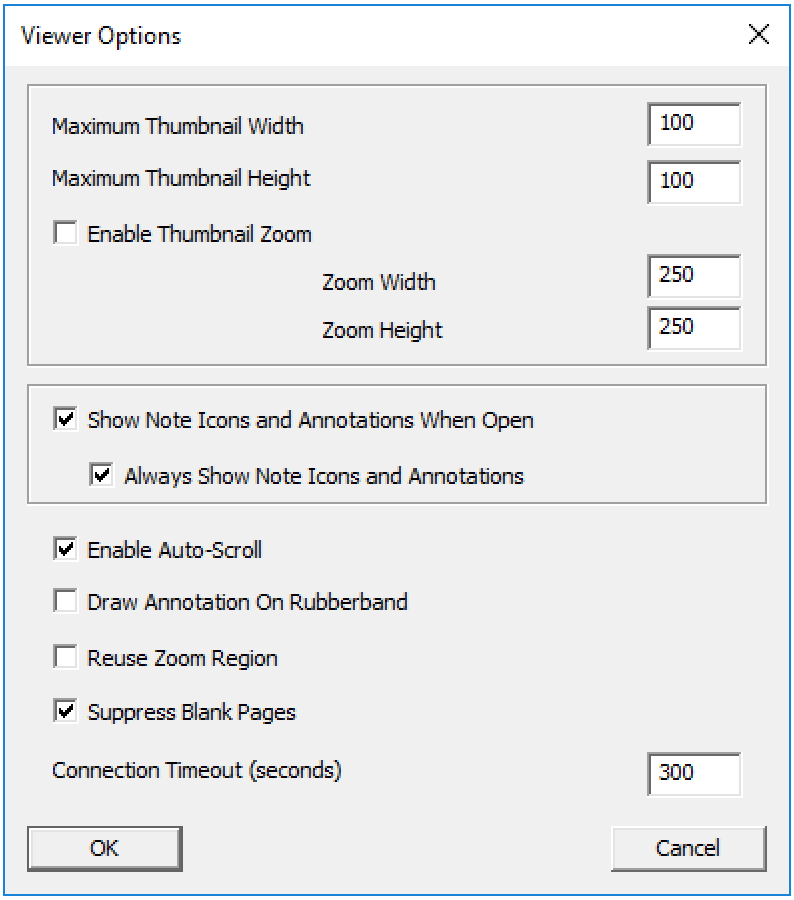
Adjusting Connection Timeout

If necessary, you can adjust the connection timeout for loading documents. If a large document is loaded over a slower network connection, the download of the file may time out before it finishes. The connection timeout can be increased to allow the client to have more time to load the document before the timeout is reached. To adjust the connection timeout, perform the following steps:

1. Click the **Options** button in the **Viewer Control** toolbar.



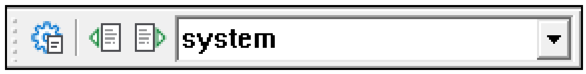
The **Viewer Options** dialog box is displayed.



2. In the **Connection Timeout** box, adjust the timeout. The minimum and default setting value is **300** seconds (five minutes).
3. Click **OK** to save your changes.

Internal Text Search Toolbar

When using the OnBase Viewer, you can perform internal text searches for specific text strings within an open document using the **Text Search** toolbar.

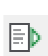


The following information applies when working with the **Text Search** toolbar:

- You cannot execute an internal text search on a text document that has an overlay applied to it. Remove the overlay in order to execute the internal text search.
- If the document is a COLD-processed document with one or more column indexes defined, then you can limit the search to the block of text defined by a column index. This is recommended for large documents to improve performance time when searching.

Note: If the **Text Search** toolbar is not displayed above the document viewing area, then right-click anywhere in the document viewing area and choose **Toolbars | Text Search**.

The **Text Search** toolbar includes the following buttons:

Button	Description
	**Text Search Options** limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 318.
	**Find Previous** searches for the preceding occurrence of the specified string within the current text document.
	**Find Next** searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

You can use the internal **Text Search** toolbar to search for specific text strings in an open document.

Note: If an overlay is turned on, you cannot perform an internal text search on the document.

Any previously entered search strings from the current Web Client session are retained in the drop-down list located on the **Text Search** toolbar. You can select a string from this list to quickly search the current document for that string. If you close the document and re-open it, the last 25 searches are displayed in the drop-down list.

To search for a text string, click in the **Search String** field and enter the characters to search for. Do one of the following:

- Click **Find Next** to locate the first occurrence of the text. You can also press **Enter** to initiate the search or to find subsequent occurrences of the text.
- Click **Find Previous** or press **Shift + Enter** to return to the previous search occurrence.

Any occurrences found in the document are displayed within a highlight bar. The actual search string is displayed in its own highlight box.

Limiting Searches Using Text Search Options

Searching an entire document for a specific text string can be time-consuming, especially if the document is very long. You can use text search options to limit your search. For example:

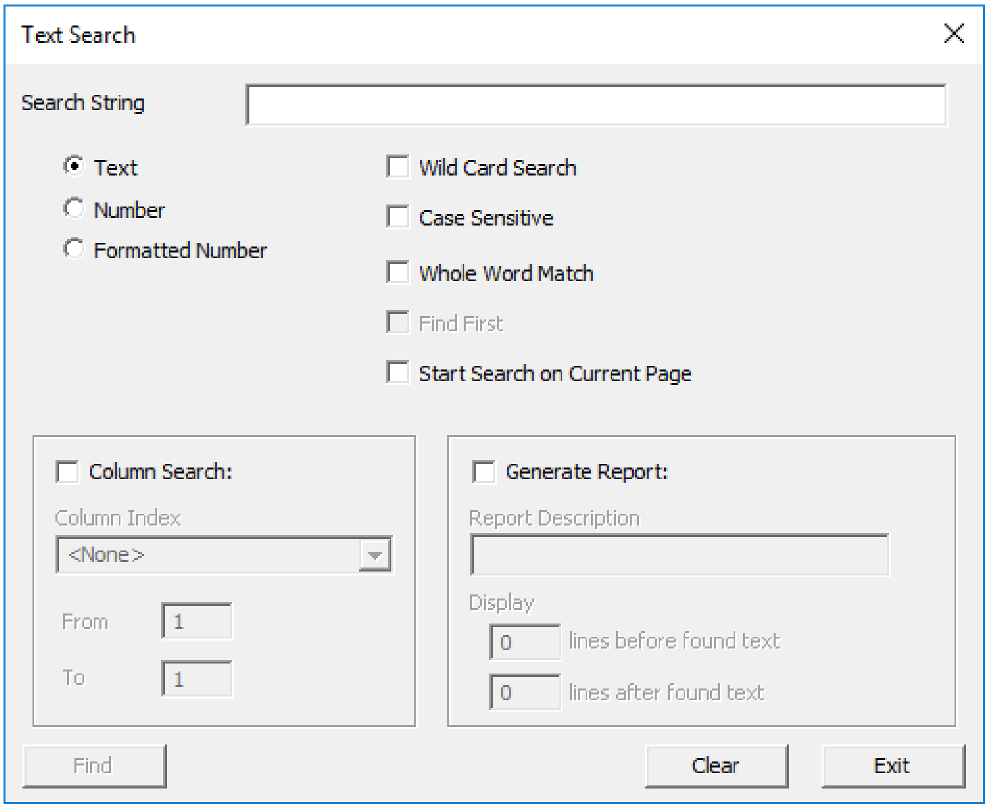
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search to those columns.

The selected settings remain applied to all internal text string searches for the document displayed until the settings are changed, disabled, or until the Document Viewer is closed.

In addition to searching within columns, you may also be able to search predefined blocks of text using column indexes, depending on how the document was imported.

To perform a search using text search options:

1. Click the **Text Search Options** button on the **Text Search** toolbar. The **Text Search** dialog box is displayed.



2. Enter your search term in the **Search String** field.
3. For a search type, select any of the following options:

Option	Description
Text	Searches for alphanumeric text.
Number	Searches for numeric values. You can use this option with the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, enter **2008 and 2009** to find documents containing both 2008 and 2009. **Caution:** If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.

Option	Description
Formatted Number	Searches for numeric values that use special characters. For example, to search for all Social Security Numbers greater than 800-00-0000, enter **> 800-00-0000** in the **Search String** field. You can use this option with the following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. You can use the **and**, **or**, and **to** operators to search for a range of values. For example, enter **800-00-000 to 900-00-0000** to find documents containing values within this range. **Note:** When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

4. Select **Wild Card Search** to include wild card characters in your text string search criteria.
5. Select **Case Sensitive** to return only matches that have the same capitalization as the text string search criteria.
6. Select **Whole Word Match** to find a text string that matches the exact word (not just characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.

Note: Find First is only available for External Text Search.

7. Select **Start Search on Current Page** to begin the search on the current page. Clear this option if you want the search to begin on the first page of the document.

   When this option is selected, the following occurs when using the **Text Search** toolbar:
   - If you search using only the **Find Previous** button, the pages that follow the current page are omitted from the search.
   - If you search using only the **Find Next** button, the pages that precede the current page are omitted from the search.
8. Select **Column Search** to search within the specified columns. Use any of the following options:

Option	Description
Column Index	Select this option to search a block of text as selected from the **Column Index** drop-down list. The **Column Index** drop-down list is unavailable if the document has no column indexes.
From	Enter the character position of the column to start the search in (the leftmost column to be searched). The column of characters at the far left of the document is **1**, the next column to the right is **2**, and so on.

Option	Description
To	Enter the character position of the column to end the search in (the rightmost column to be searched). The number in the **To** field must be greater than or equal to the number in the **From** field.

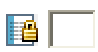
9. Select **Generate Report** to create a report, which is stored under the **SYS - Search Reports** Document Type. Use one or both of the following options:

Option	Description
Report Description	Enter a name for the generated report.
Display	Enter the number of lines of text to show above and below the found text in the **Lines before found text** and **Lines after found text** fields.

10. Click **Find**. The search is executed with the selected options.

Column/Row Locking Toolbar

The **Column/Row Locking** toolbar is available for text documents when using the OnBase Viewer. Use this toolbar to lock columns of text into place at the left of the document, or to lock rows of text into place at the top of the document, keeping them static as you scroll through a page.

Button	Description
	**Lock Columns** locks the number of columns specified in the adjacent field. The number of columns you specify is the number of character positions at the left of the page.
	**Lock Rows** locks the number of rows specified in the adjacent field. The number of rows you specify is the number of lines at the top of the page.

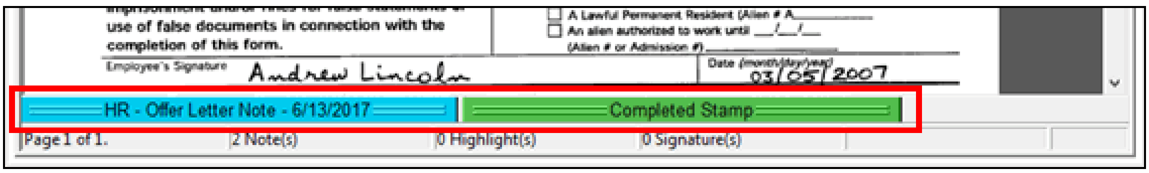
Any locks you specify will be applied to the current document for as long as it remains open. They will be removed as soon as you close it or open another document in the same viewer. If you return to the same document later, even in the current session, the columns or rows will be unlocked.

Notes Toolbar

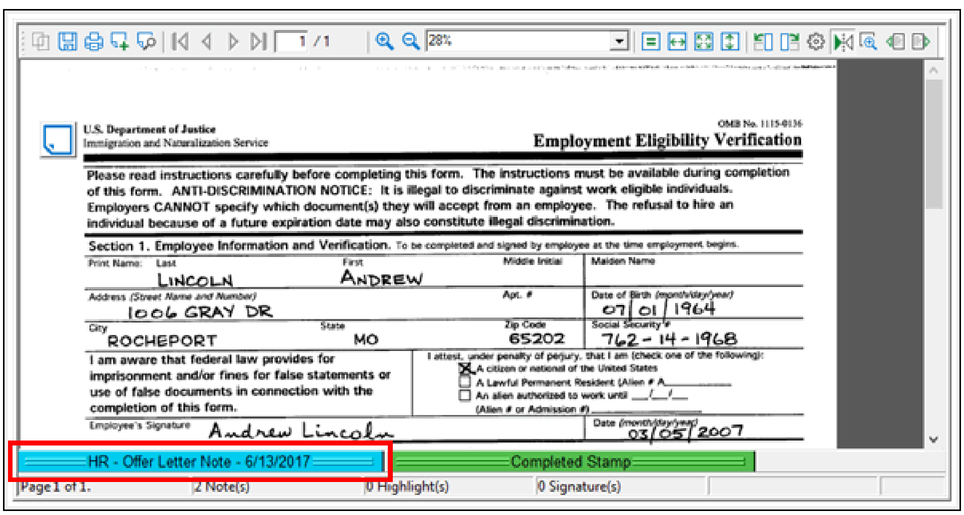
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

Note: The **Notes** toolbar is only available in the ActiveX Web Client.

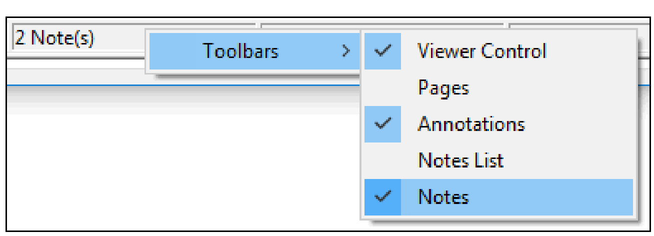
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



If you do not see the note tab, but there are notes on the document, ensure that the **Notes** toolbar is visible. Right-click the status area on the bottom of the screen, and then select the **Toolbars | Notes** menu option.



View Notes - Open and View Notes or Annotations

Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

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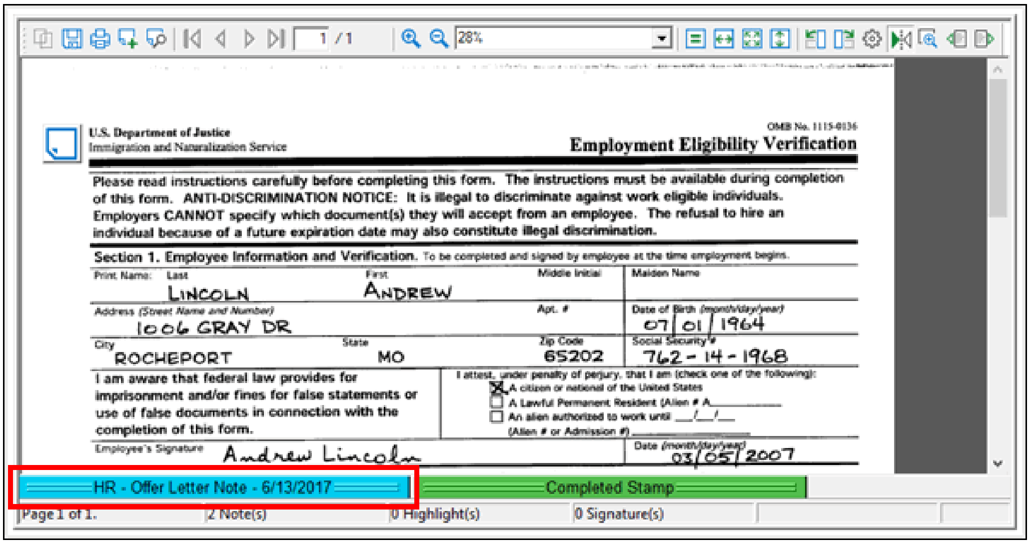
Viewing Notes

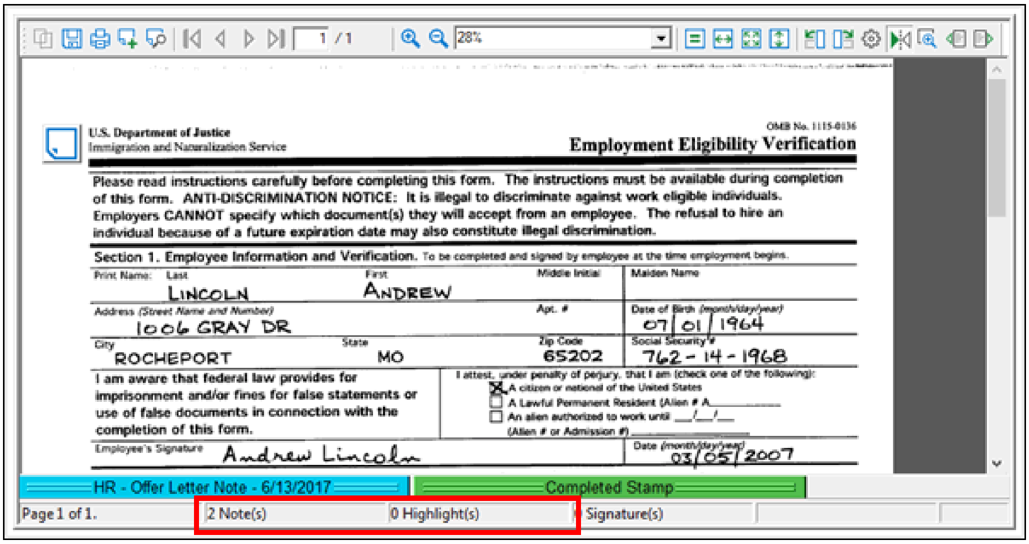
You can view notes or annotations using any of the following methods:

- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).

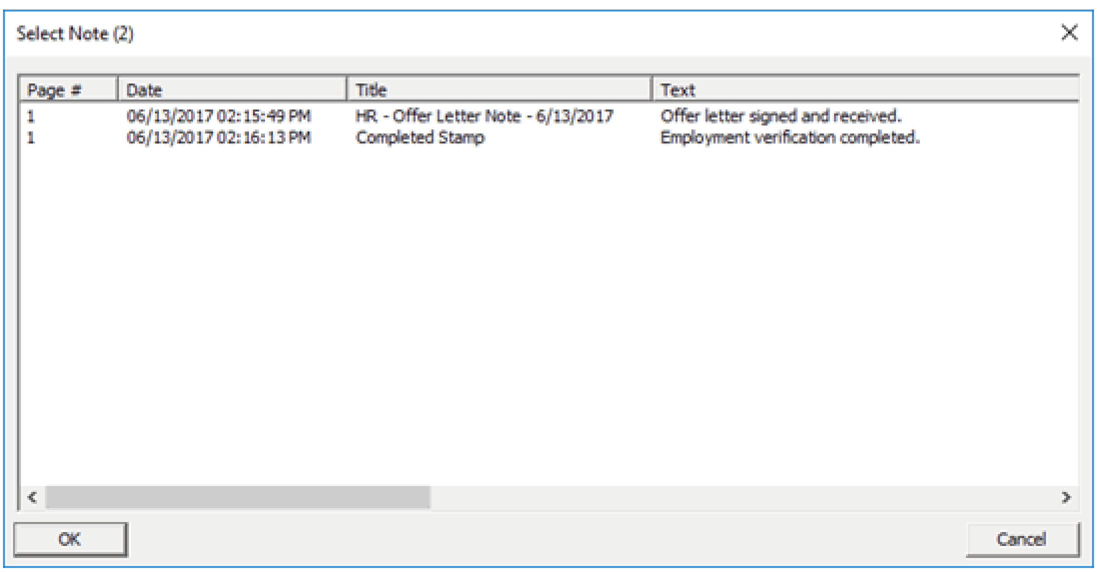


- Right-click an open document and select **Notes | View Notes**.

- Double-click the note in the **Notes List** toolbar.
- Double-click the **Note(s)** section or the **Highlight(s)** section of the status bar.



If a note or annotation exists on a document, it is listed in the **Select Note** dialog box.



The list includes the page where the note is found, the note type, the text of the note, and the date the note was created. Click on the column headings to sort the notes by that column.

Open a note by either selecting the note in the **Select Notes** dialog box and clicking **OK**, or by double-clicking the note in the **Select Note** list.

Note: Depending on your system's configuration, you may be unable to open certain notes in the **Select Note** dialog box. See your system administrator if you have any questions.

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Note: If you move a note off of the document, OnBase automatically resets the note position to the top left corner when the document is closed. When the document is opened again, the note is displayed in the top left corner.

Adding Notes, and Editing and Deleting Notes and Annotations

Notes and annotations can be added to, edited, or deleted from documents. Before you start working with Notes and annotations, ensure you have appropriate privileges for adding, editing, or deleting them.

Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text and position only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only. You can reposition the note while viewing the document, but the note will return to its original position when you close the document.

Take note of the following when working with notes and annotations:

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

Add a Note to a Document

Users with privileges to create notes can add new notes to documents from the **Add Note** dialog box. Users can only add notes of the type(s) that his or her User Group(s) has rights to create.

Note: If you are viewing a document that is locked by Records Management, you can create new notes, but you cannot modify any existing notes.

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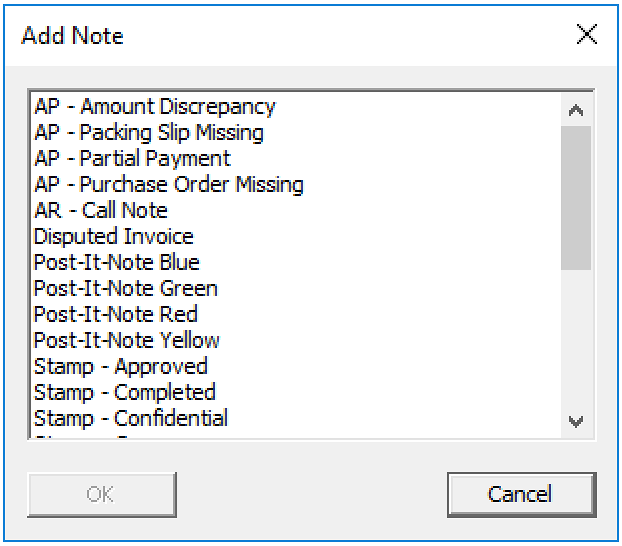
1. Access the **Add Note** dialog box using either of the following methods:
   - Click the **Add Note** button from the Viewer Control toolbar.
   - Right-click the document and select **Notes | Add Note**.

   The **Add Note** dialog box displays the Note Types that you have rights to create.



2. Select a Note Type and double-click, or click **OK** to add the note.
3. Enter descriptive text and move the note icon to the desired location on the document. The note text and icon, in the position you placed it, is saved automatically.

1.

Note: The **Ctrl + N** shortcut is not supported in Chrome.

Edit Note or Annotation Text

To edit a note, open the note and edit the note contents. Right-click for text-editing options:

Note: If you are unable to access the text box, you may not have user rights to edit the note.

- **Undo** - select to undo the last typed action
- **Cut** - removes selected text and place it on the clipboard
- **Copy** - retains selected text, but place it on the clipboard

- **Paste** - inserts clipboard text in to the active area (last place the mouse was clicked)
- **Delete** - deletes selected text
- **Select All** - selects all text (including default note text)

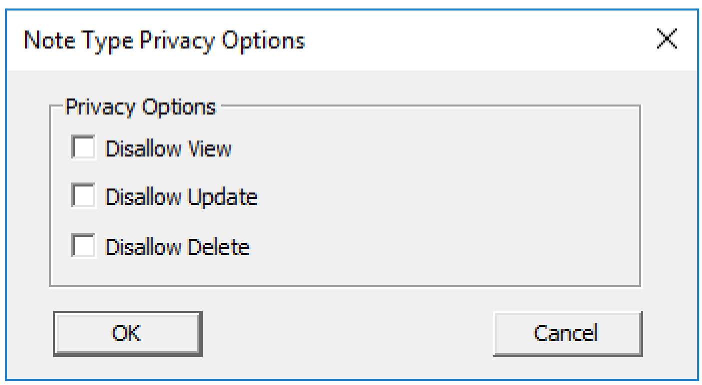
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

Editing Note Type Privacy Options

Privacy options determine whether other users can view, edit, or delete an individual note you created.

1. To edit privacy options on a specific note, do one of the following:
   - Right-click on the note title bar and select **Privacy Options**.
   - Right-click the note in the **Notes List** toolbar and select **Privacy Options**.

   The **Note Type Privacy Options** dialog box is displayed.

   Some options may be unavailable depending on how the Note Type was set up by a system administrator.
2. Select one of the following options to restrict other users from performing the corresponding action.

Privacy Option	Description
Disallow View	Selecting this check box disallows users from viewing the note.
Disallow Update	Selecting this check box disallows users from updating information on the note.
Disallow Delete	Selecting this check box disallows users from deleting the note.

3. Click **OK** when you have selected the desired privacy options.

Deleting a Note

To delete an existing note in the ActiveX Viewer, do one of the following:

- Right-click on the note title bar and select **Delete Note**.
- Right-click the note in the **Notes List** toolbar and select **Delete Note**.

Click **Yes** when prompted to confirm.

Note: You cannot delete an existing note on a locked document. See your system administrator for information regarding Document Lock Administration.

Changing the Note Type

To change the Note Type of an existing note, navigate to the page of the document the note appears on, and do one of the following:

- Right-click on the note title bar and select **Change Note Type**.
- Right-click the note in the **Notes List** toolbar and select **Change Note Type**.

Note: The **Change Note Type** option in the **Notes List** toolbar is only available when the page the note belongs to is displayed in the Document Viewer. For example, the option is not available if page 1 is displayed, and the note you right-click is on page 2.

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Annotations Toolbar

The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default it may be hidden.

Note: If you are viewing a document that is locked by Records Management, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

You can view, modify, or delete annotations the same way you do notes.

Button	Description
	**Toggle Redaction** lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the **Toggle Redaction** button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	**Save Redactions** saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	**Toggle Annotation** enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again.

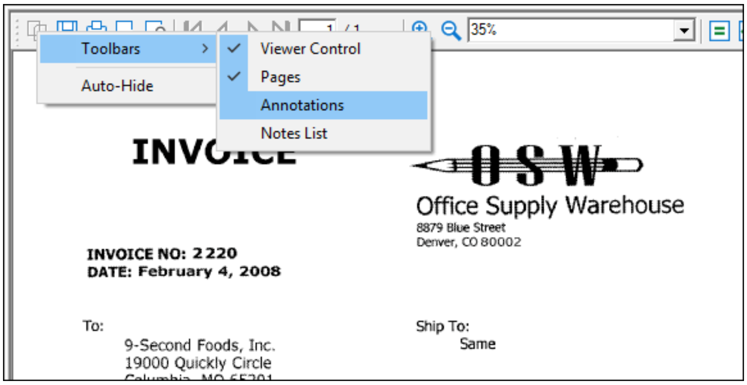
Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

Creating an Annotation

If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

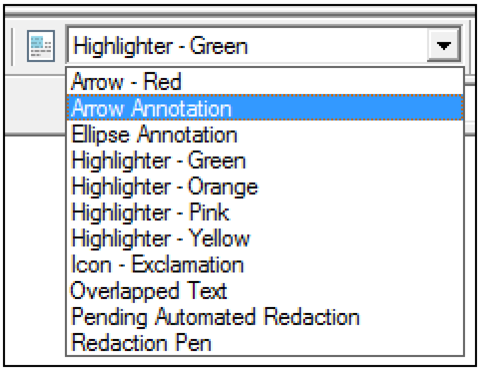
1. Ensure that the Annotations toolbar is displayed on the Document Viewer.

   If the toolbar is not displayed, enable it by right-clicking the document or the Document Viewer and selecting **Toolbars | Annotations**.



Note: The option to enable the Annotations toolbar is only available when using the OnBase Viewer. When using the OnBase Web Viewer, the Annotations toolbar is automatically available in the toolbar at the top of the viewer window.

2. In the Annotations toolbar, select the type of annotation from the drop-down list.



   Depending on your system's configuration, redaction annotations may be available from the annotations drop-down. Redaction annotations are not supported for creating permanent redactions in this module.

   You can use redaction annotations to print redacted documents on an ad hoc basis. To remove redaction annotations after printing a document, see Deleting a Note on page 330.

3. Enable the selected annotation by clicking the **Toggle Annotation** button.

Tip: You can also create annotations using the Rubber Band feature if **Draw Annotation On Rubberband** is selected in Viewer Options. When this options is selected, you do not have to click the **Toggle Annotation** button to enable the annotation. To create the annotation using the Rubber Band feature, press **Ctrl** as you click and drag the pointer over the document. For more information on the **Draw Annotation On Rubberband** option, see Draw Annotation On Rubberband on page 314.

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4. Using the pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

Access a Document's Keyword Values

Some documents have one or more Keyword Values displayed automatically when you open the document. You can also view Keyword Values that are not auto-displayed. Depending on your system's configuration, these Keyword Values may be masked or read-only.

To access a document's Keyword Values, do one of the following:

- From an open image or text document, right-click and select **Keywords** to display the **Add/Modify Keywords** dialog box.
- From an open OLE or PDF document, click the **Keywords** button from the viewer control toolbar.

From the **Add/Modify Keywords** dialog box, you can view or edit Keyword Values, depending on your assigned privileges and the Document Type of the document. Some Document Types are configured to disallow editing of Keyword Values, which renders a document's Keyword Values read-only.

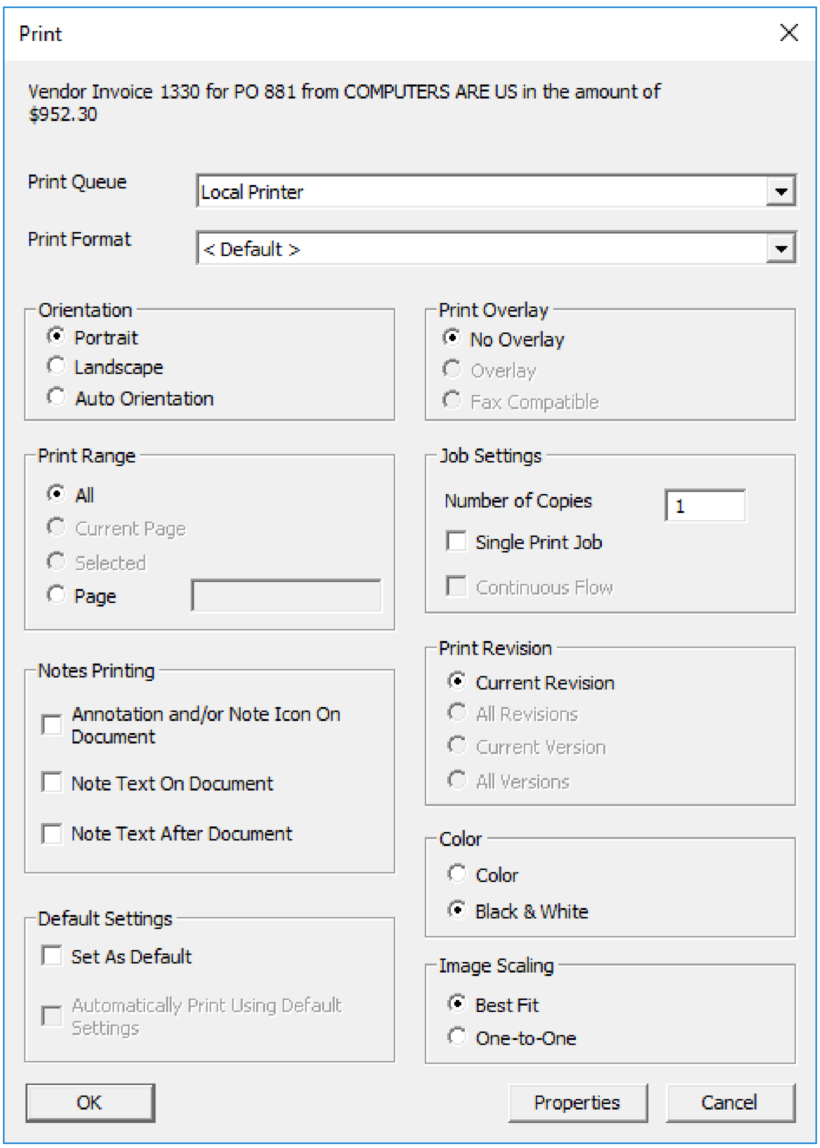
Note: When editing keyword values that are displayed automatically on an opened document, it may be necessary to close and reopen the document to correctly auto-display those values.

Printing Documents

The **Print** option is available if your computer system has access to a printer, and you have the appropriate user rights.

1. To print a document, perform one of the following actions:
   - From an open document or from one or more selected documents in the Document Search Results list, right-click and select **Print**.
   - From an open document, click the **Print** toolbar button.
   - If the document is open in an external application, select the print option from the external application. (For example, select **File | Print** from the application.)

   The **Print** dialog box is displayed.



2. Select one of the available printers and the appropriate print options. For a description of print options available from the OnBase **Print** dialog box, see the following table.

Note: Depending on your configuration, the **Print** dialog box may default to print all pages or the current page of the document.

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator. **Note:**
Print Format	The **Print Format** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box. When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection prints each document using the print format configured for its Document Type. **Note:** The **<Use Doc Type Default>** option is not available when printing Document Types that do not have a default print format.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper. **Auto Orientation**: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, **Portrait** is used. If the width of the page is greater than the height, **Landscape** is used. For multi-page images, the orientation is determined on a page-by-page basis. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.

Option	Description
Print Overlay	**No Overlay:** Prints the document without the associated overlay. **Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type. **Note:** Printing overlays is not supported when running OnBase as a print server.
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents. **Current Page:** Prints the current page. **Selected**: (Currently not available) **Page**: Prints a range of pages in the document. **Note:** If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered **5, 1-3, 9,** then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue. **Note:** The **Print Range** setting is not supported for printing E-Forms in the ActiveX Web Client.

Option	Description
Job Settings	**Number of Copies**: Enter the number of copies to print. **Note:** When printing several copies of a multi-page document to XPS or PDF Creator, some print jobs may combine. **Single Print Job**: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately. **Note:** The **Single Print Job** option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the **Single Print Job** option. **Continuous Flow**: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the **Continuous Flow** option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page. **Example**: If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document. If you select **Continuous Flow**, your output would be two pages, the first page having two documents and the second having the remaining third document. Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.
Notes Printing	**Annotation and/or Note Icon On Document**: Prints the note annotation (graphical representation of a note) on the document. **Note Text On Document**: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations. **Note Text After Document**: Prints the title and text of any notes, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type on a separate page. **Note:** Depending on your system's configuration, some note icons or text may not be printed no matter what **Notes Printing** options you have selected. See your system administrator for more information. **Note:** The **Annotation and/or Note Icon On Document** and **Note Text On Document** options do not apply to E-Forms, HTML forms, or XML documents.

Option	Description
Print Revision	These options are only available if your database is licensed for EDM Services. For more information, see the **EDM Services** documentation. **Note:** The **Current Revision** option is automatically selected.
Color	**Color:** Select to print in color. **Black & White:** Select to print in black and white. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** Depending on your installed print drivers, these options may not be respected with certain printers.
Default Settings	**Set as Default:** Select this option to use the settings that you have selected in this dialog box as the default print settings. The settings will remain selected as default on that workstation for all document types until the check box is deselected. **Automatically Print Using Default Settings:** This setting is reserved for future use.
Image Scaling	**Best Fit:** Prints image to fit, with scaling as necessary. **One-to-One:** Prints image actual size/scale (1:1 in terms of inches).

Note: Select the **Properties** button to configure options specific to the selected printer. See the documentation for your printer for more information on these options. The **Properties** button is not available for PDF documents.

3. Click **OK**.

Note: Not all methods are available from all Document Types.

E-Forms not Printing Correctly

Some users may encounter the following issue: when printing an E-Form from a results list (such as a Document Search Results list), the E-Form is printed without any data (i.e., only a blank shell of the E-Form is printed). This behavior is caused by the way Internet Explorer handles security. Users are still able to print E-Forms by opening the E-Form and printing from the Document Viewer.

Navigate

Navigate is a feature available for multi-page text and image documents. You can access the **Navigate** options by right-clicking anywhere in the open document and selecting **Navigate**.

Option	Description
First Page **Last Page**	Selecting **First Page** or **Last Page** immediately displays the first or last page in the document, respectively.
Next Page **Previous Page**	Select **Next Page** or **Previous Page** to display subsequent or preceding pages in the document, respectively.
Go To Page	Select **Go To Page** and type the page number of the page you want to display. **Note:** You can also access the **Go To Page** dialog by double-clicking the **Page X of Y** section of the status bar.

Scale

The Scale feature provides options for viewing documents.

Option	Description
Actual Size	Displays the document without any viewer scaling (i.e., in the same aspect ratio in which it was acquired).
Fit Width	Scales the display of the current page in the viewer as adjusted per the maximum width of the page in the viewer.
Fit Height	Scales the display of the current page in the viewer as adjusted per the maximum height of the page in the viewer.
Fit in Window	Scales the display of the current page in the viewer according to the maximum viewer area.
Zoom In **Zoom Out**	Magnifies (**Zoom In**) or reduces (**Zoom Out**) the displayed area of the image in the viewer.

Option	Description
True Size	Displays the image at its original size (monitor DPI divided by image DPI when rendering at 100%). For example, if you scanned a 3" x 3" paper document into OnBase, the document displayed at True Size would occupy 3" x 3" of screen space. **Note:** Digital images, such as GIF and ICO files, can have undefined DPIs. For images whose DPIs are undefined, the **True Size** option uses a default image DPI of 200.

Process

There are several process options available when viewing documents.

1. From an open document, right-click and select **Process**.
2. Select one of the process options described in the following table:

Option	Description
Rotate Right	Rotates the image 90 degrees to the right.
Rotate Left	Rotates the image 90 degrees to the left.
Invert	Reverses the colors in the color palette. For example, black pixels become white and white pixels become black. A document is inverted only for the duration of its viewing session. When the document is closed, it resumes its default color properties. Selecting **Save Rotation** does not save the inverted document.
Flip Horizontally	Displays the document as a mirror image across the vertical axis.
Flip Vertically	Displays the document as a mirror image across the horizontal axis.

3. Right-click and select **Process | Save Rotation** to save the rotation. A confirmation message is displayed.

Note: Clicking **Save Rotation** saves each individual page of the document with any rotations that have been applied to it.

If you haven't selected the User Option **Rotate Auto-Save** in the OnBase Client or Web Client, and you don't select **Save Rotation**, the document retains the rotation for the current viewing session and resumes its default display properties upon closing. The document is displayed with its default properties the next time the document is opened.

Note: You can only save rotations on image documents.

Display

The Display feature can soften or increase the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.

The Display feature is set to **Scale to Gray** by default. To turn Scale to Gray off, do one of the following:

- Right-click the document and select **Display | Normal**.
- Click the **Scale to Gray** button from the Viewer Control toolbar.

To turn Scale to Gray back on, do one of the following:

- Right-click the document and select **Display | Scale to Gray**.
- Click the **Scale to Gray** button again from the Viewer Control toolbar.

Encoding

While viewing a text document, you can change the document's character encoding format. With additional rights, you can also save the selected encoding format as the default encoding format for that document.

1. Right-click on an open text document and navigate to **Encoding**.
2. Select one of the available encoding formats.

   The document is refreshed to display in the selected format. To save this encoding format as the default for this document, right-click and navigate back to **Encoding**.
3. Click **Save Encoding**. The selected encoding format is saved as the default for this document.