General Overview

- **Workspace (and other tabs: Drafts, Sent, Archive, Trash)?**
  - **Item types**
  - **Pages**
  - **File conversions**
- **Composing messages and faxes**
  - **Text only messages and faxes (from scratch)**
  - **Including a Workspace Item**
  - **Attaching pages, documents or images**
  - **Searching for contacts**
- **Getting documents or images into Docu-Portal**
- **Receiving messages and faxes**
- **Filing documents into charts**
  - **Faxes and messages received**
  - **Scanned items**
  - **Associating a patient**
- **Common functions explained**
  - **Views**
  - **Item types and tags**
  - **Audit trail**
- **Contact management**
- **System start-up and shut-down**

Workspace (and other tabs: Drafts, Sent, Archive, Trash)?

The Workspace is the default view on the Main Page where inbound messages and faxes will appear. It is also where other documents and images that are pulled (browsed files, screen shots) or pushed (printed) into Docu-Portal will appear.

To preview a listed item, you can either:

- Click on "Expand" on the dark gray toolbar, or
- Click on "more" on the left end of the header

Clicking anywhere else on the header will open the entire item for sending or filing

Drafts include those items that have been begun, but not sent or filed. Sent includes those items which have been sent or filed. Archive includes those items which have been explicitly archived or Workspace items which have been wholly included in a Sent item. Trash includes those items which have been explicitly deleted. Archived items remain indefinitely. Trashed items are automatically disposed of within 30 days.

Item types

The following items are displayed using different colors in the header bars. The item types are references to how they were sourced:

- Faxes – dark blue header
- E-mails – light blue header
- Secure messages – medium blue header
- Files – light green header
- Screenshots – medium green header
- Printed files – dark green header

You can perform certain actions on the listed items, such as:

- Opening them to either send or file the items
- Viewing them at full-size
- Viewing them as a PDF in a new window to be saved or printed
- Deleting them, marking them read/unread

Pages

The thumbnail images in each item are referred to as "pages". These are individual pages from a fax, an attachment to an e-mail or secure message, a print file from another application, a document retrieved from your computer, or a screenshot taken by Docu-Portal.

You can perform certain actions on the pages within a listed item, such as:

- Selecting them individually to be included in a newly created item to be sent or filed
- Editing them by clicking on the page

Once a page has been individually selected for inclusion in a "sent" item, it will be labeled "used" to help keep track of partially dispensed Workspace items.

File conversions

Pages are created from numerous sources: faxes, print files, Word documents, PDFs, screenshots, etc. Docu-Portal uses a conversion process to represent them as individual pages that can be viewed and edited within Docu-Portal. Although, we'd like it to be perfect, not all originals can be converted successfully into the Docu-Portal format. When that happens, you will see an image outline typically with a red x in it. Whenever the original document does not convert successfully, or if the original document was an attachment to an e-mail or was a computer file browsed into Docu-Portal, the original format is retained, as well. You can typically retrieve the original document or file by e-mailing it to any common e-mail system. Original documents and unconverted documents cannot be successfully included in secure messages, faxes, or EMR imports.

Any page represented in an item can be converted to PDF format for printing or saving directly to your computer. Any collection of pages represented in an item can be converted to a single PDF for the same purpose.

When pages are imported to SOAPware, they are automatically combined into a single PDF, which also includes the title and notes input at the time of the import.

Pages may optionally be sent as a PDF (default) when attached to an e-mail or secure message.

- **Composing messages and faxes**
  The method for composing a brand new item is the same as beginning with an existing item, except for a couple starting steps:
  - **Text-only messages and faxes (from scratch)**
    Click “Compose”, which opens a window in which you can search for or enter a contact. After selecting a contact, toggle the button representing the desired function (secure message, fax, or email) and complete a title and text for the message or fax, in the pop-up editor.
  - **Including a Workspace item**
    Click on the colored header for the desired Workspace item or click on “Open” if the item is already in expanded view, which adds the Workspace item to a new window in which you can search for or enter a contact. After selecting a contact, toggle the button representing the desired function (secure message, fax, or email) and complete a title and text for the message or fax, in the pop-up editor.
  - **Attaching pages, documents or images**
    For new items that will include individual pages, documents or images, you must first get those documents or images into one or more items on the Workspace. There are three methods for doing this which are described below, in “Getting documents or images into Docu-Portal”
    1. Select any images or document pages from within one or more expanded items on the Workspace (click just below the image or page, but not directly on it) that you wish to include in the new item to fax or message.
    2. Click on “Compose”

  In an upcoming release, you will be able to start with “Compose” and then add images or pages from existing items or from files on your computer or from a screenshot. Currently, you must follow the prescribed order, above.

  - **Searching for contacts**
    Type at least two letters of the first or last name of the contact in the “Send to” box to begin searching. A list of up to 10 names fitting the search criteria will appear. You may also search by email address or fax number, if you know it.

    If more than 10 contacts fit the search criteria, you can narrow the search by typing more letters.

    When you see the contact you want, click on it, and then the functions available to that contact (secure message, fax, or email) will be enabled.

If the contact is not present, or if you wish to use a fax number or e-mail address not currently associated with a contact, you will need to update that contact in SOAPware and then try your search again.

- **Getting documents or images into** Docu-Portal

  From SOAPware, another application, or any program that can print, such as Word:
  To get a document from SOAPware or other application into Docu-Portal, select the "Print" function as though you intended to print a hardcopy, but instead select the "Docu-Portal Printer" from the printer choices presented. This printer should be automatically installed on your computer whenever you are logged into Docu-Portal (and uninstalls when you log out). If you use a Mac you may need to follow the instructions in the "Set-up Reference" from within the Help menu.

  Screen images, such as the display of an X-ray:
  For capturing a screen image displayed on your computer and getting it into Docu-Portal (which can be a handy way of sending diagnostic images out of hospital EMRs or radiology systems), do the following:
  1. Minimize your browser so that the image is showing
  2. Right-click on the "U" in the system tray (usually at the bottom right of your screen)
  3. Select "Capture Screen"
  4. Move your mouse to the top left corner of the image, and hold down the left-click button while you drag the mouse to the bottom right corner of the image, and then release.
  5. Either edit the image that appears in the Image Editor and "Save", or simply "Save"

  Files on your computer or on your network:
  1. Right-click on the "U" in the system tray (usually at the bottom right of your screen)
  2. Select "Add File"
  3. Browse for the file, and either double-click on it or select it and click "add file"

- **How do I find an item in Docu-Portal?**

  To more efficiently look through items in the Workspace or any of the other tabs (Drafts, Sent, Archive, Trash), you can use the "View" filters found at the top right along the dark gray toolbar. Checking "Private items" will only display those items in your own folders, whereas checking "Practice items" will display those items in the shared Practice folders.

  By clicking on "View", you also have a number of check boxes that enable you to turn off or turn back on views of various types of items. The types of items (e.g. faxes, e-mails, etc.) are listed on the left. The right side boxes allow you to filter based on your own system of tagging items, using the colored tags that appear to the left of the item.

  A "Search" function will be added in an upcoming release.

- **Receiving messages and faxes**

Faxes are automatically sent to the Practice Workspace if you use Docu-Portal as your fax receiving system. You were assigned a fax number in the initial configuration (the number is displayed under the Admin menu, Billing Information) and can always begin using it, if you have not, yet.

If you use a fax line other than the one supplied by Docu-Portal (and elect not to forward it to the Docu-Portal fax number), you may still receive faxes directly into Docu-Portal by the following method:

- Folder retrieval: Docu-Portal provides the capability to automatically forward the contents of a specific folder into the Workspace. Faxes placed in this folder will automatically appear in the Workspace (under the "Files" header).
    - In Vista, it's C:\Users\UserName\SendToDocu-Portal.
    - In XP, it's C:\Documents and Settings\UserName\SendToDocu-Portal.

Secure messages received from other Docu-Portal members appear automatically as "Secure messages" in the header description.

To receive email automatically, you may provide others with your "@myupdox.com" e-mail address (found under "Tools" in "My Profile and under "Admin" in "Practice Profile"). Also, see "Forwarding email" in the "Set-up Reference" under the Help menu to aggregate email from other sources in Docu-Portal.

- **Filing documents into charts**

  Filing documents into patient charts uses many of the same features and steps as sending messages and faxes to other contacts.

    - **Faxes and messages received**

      Select either specific pages from within a Workspace item (for example, the fax pages other than the cover page) or select the entire Workspace item for filing. To select only individual pages, click just below the image (not on it) from one or more Workspace items, then click "Compose with attachments". To select the entire Workspace item, click on the item header or click on "Open" in the expanded view of the item.

      You should be looking a newly opened window with the desired pages and/or message content. First, search for a patient to associate with the item to be filed (see "Associating a patient", below). Then, select "File to EMR" and/or "Send to Disk", to either file the item to the patient's chart in SOAPware and/or to file the item to a folder on your computer network.

      You should be presented with the options and privileges provided from within SOAPware for filing into the chart. You must add a title, and then you may add a description, and select from the available options to categorize, notify a provider, etc.

    - **Scanned items**

      Presumably, scanned items will be placed first in a folder on one of your office computers. If that folder is not configured to automatically add its contents to the

Workspace (see Receiving Faxes, above), you may browse for that item by right-clicking on the "U" in the system tray and selecting "Add file". Once the scanned item is present in the Workspace, follow the same steps as with a fax or message, in the instructions directly above.

- **Associating a patient**

  Type at least two letters of the first or last name of the patient in the "Associate…" box to begin searching. A list of up to 10 names fitting the search criteria will appear. If the patient has an email address on file, you can search by email address, as well.

  If more than 10 patients fit the criteria, you can narrow the search by typing more letters.

  When you see the patient you want, click on it, and then the functions available to that patient (file to EMR, send to disk, email, send to portal, email patient) will be enabled.

  If the patient is not present, or if you wish to use a function not currently associated with a patient, you will need to add or edit the patient in SOAPware.

- **Common functions explained**
  - **Views**

    Views (top right on gray bar) allow you to filter for only those types of items you wish to look through. All item types and all possible tags are checked by default. If you wish to exclude certain item types from the Workspace or other tab you're looking through, uncheck all but what you want to see. For example, if you only want to look for faxes, uncheck email, secure messages, print files, files, and screenshots.
  - **Item types and tags**

    Item types are used to describe the original source of documents or text displayed in Docu-Portal. The headers for the individual items display the item type and use system-generated colors to make those item types easier to identify. Tags are custom labels you add to items for follow-up, using the colored tags provided. You can use these to mark important items, items that need further review, categories of items (such as refills, e.g.) to make it easier to find them later.
  - **Audit trail**

    You can view the sequence of completed and in-process events related to that item (in Workspace, Drafts, Sent, Archive, or Trash) by expanding that item and clicking on "more options". You'll see "Audit Trail at the top right, which, when selected, will bring up a dialogue box with the history of that item.
- **System start-up and shut-down**

  Docu-Portal will start with reboot of your computer (Windows only) unless you unselect that option on the login screen. If you need to manually start Docu-Portal, you should ordinarily do so from the icon on the desktop. When you close the browser, Docu-Portal continues to run in the system tray. Anytime Docu-Portal is running, you can right click on the "U" in the system tray and select "Open Browser". To quit Docu-Portal, you need to right click on the "U" in the system tray and select "Quit".