

Form Completion for Providers Working Remotely – SharePoint Behavioral Health

This document is to assist in the workflow for documents requiring a provider’s signature when the provider is working remotely and needs to complete and/or sign the form. The form may have been mailed, faxed, brought into the clinic by the patient, or sent as an attachment via MyChart.

Clinical staff (RNs/MAs) and providers have been provisioned a clinic-specific SharePoint site for the purpose of completing and signing forms. There are two main SharePoint sites, **BHS – Psychiatry Document Management** and **BHS – AODA Document Management**.

Recommendations:

- The preferred method for accessing the SharePoint sites is via the Citrix Virtual Desktop.
- Clinic Site Administrators should create subfolders for organization within their designated SharePoint site.
- Clinic Administrators should regularly audit and update access to the SharePoint site.
- Designate staff to complete the scanning workflow in the clinic who have access to a workstation with the ability to download documents to SharePoint.
- Verify the type of multifunction device in your clinic and your scanning capabilities.



Caution For clinics that do not have a multifunction device that can scan to an H: drive, an HIM Scanner (Fujitsu) should be used.



Note If the provider does not need to complete or sign the document, continue to use existing workflows.



Table of Contents

Completing a Paper Form 2

Scanning and Saving a PDF 6

Completing a Form Sent in MyChart 7

Saving the Document to the H: Drive from a MyChart Message 8

Returning the Form to the Patient Via a MyChart Message 9

Completing a Paper Form

This workflow outlines the process for completing a paper form that a patient has mailed, faxed, or brought into the clinic when the provider is working remotely. Continue the current processes of creating an encounter for this documentation. Steps in the process are described in greater detail in the document.



Note The following workflow is recommended to be completed using Microsoft Edge. While using other web browsers will work, some steps may be slightly different.

Clinical Staff – Scan and Save the Form

1. Using the multifunction copy machine, scan the form as a PDF document to your H: drive (See *Scanning and Saving a PDF* section below).



Note Staff in clinic should complete the sections on the paper form when possible.



Important The file name should follow the naming standard: Date (MMDDYY), first 3 letters of the patient's last name, first 3 letters of the patient's first name.

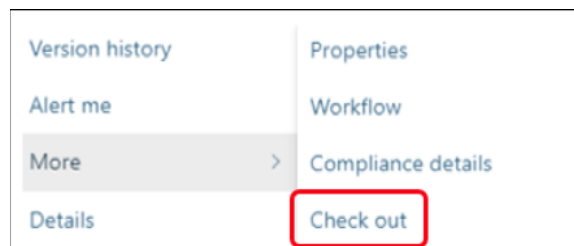
For example, a PDF for John Smith: 041420SmiJoh

2. Navigate to the appropriate SharePoint folder.
3. From your H: drive, locate the document. Click and drag the document to the desired SharePoint folder.
4. Delete the document from the H: drive.

Clinical Staff – Electronically Complete the Form


To complete sections of the form electronically:

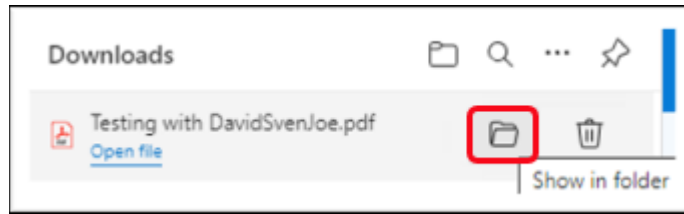
1. Check out the document.
 - A. On the SharePoint site, right-click the document name, then select **More** and **Check out**. This puts a 'lock' on the document so that others cannot update or move it.



Note A circle with an arrow will appear when 'locked.' Hover over the icon to see who has it checked out.

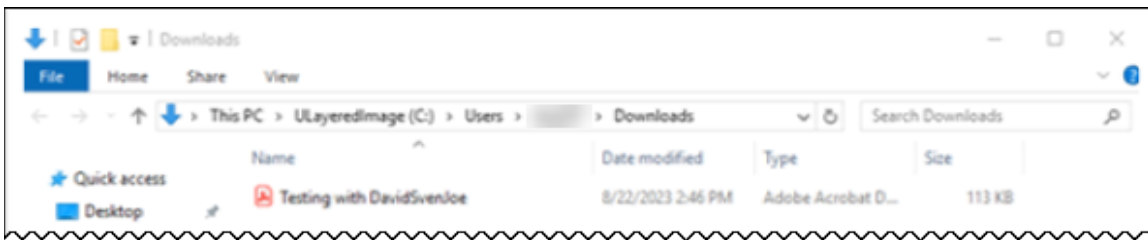


2. Download the document.
 - A. Right-click the document and select **Download**.
 - B. To open the document, from the *Downloads* menu, click **Show in folder** .

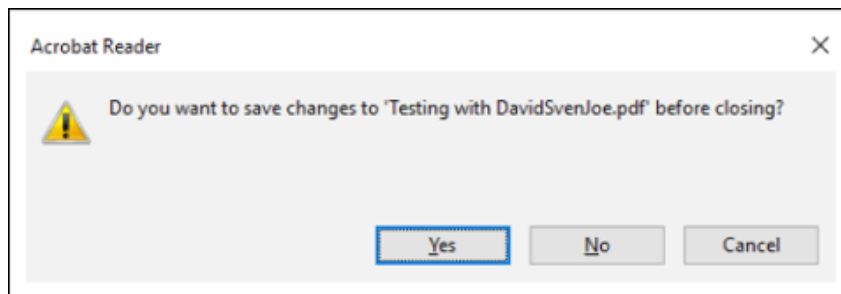


Important Do NOT click Open File as this will open the file in the browser and you will not be able to properly annotate or sign the document.

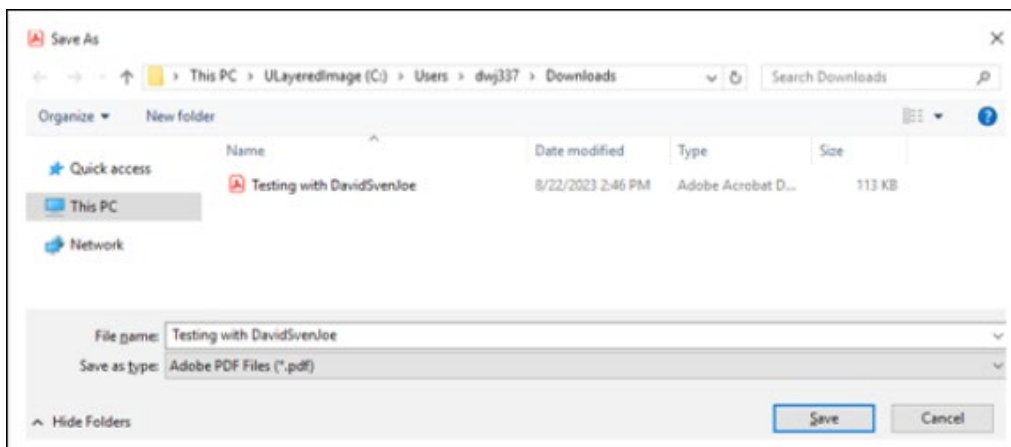
- C. The file appears in a File Explorer window. Double-click the file to open it with Adobe Acrobat Reader.



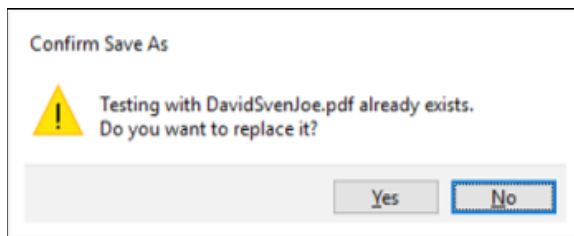
3. Annotate/sign the document.
 - A. Use Adobe Reader tools to add text or a signature to the document, as appropriate.
 - B. When finished, close the document. When asked if you want to save the changes, click **Yes**.



- C. The current file location and name appear. Click **Save**.

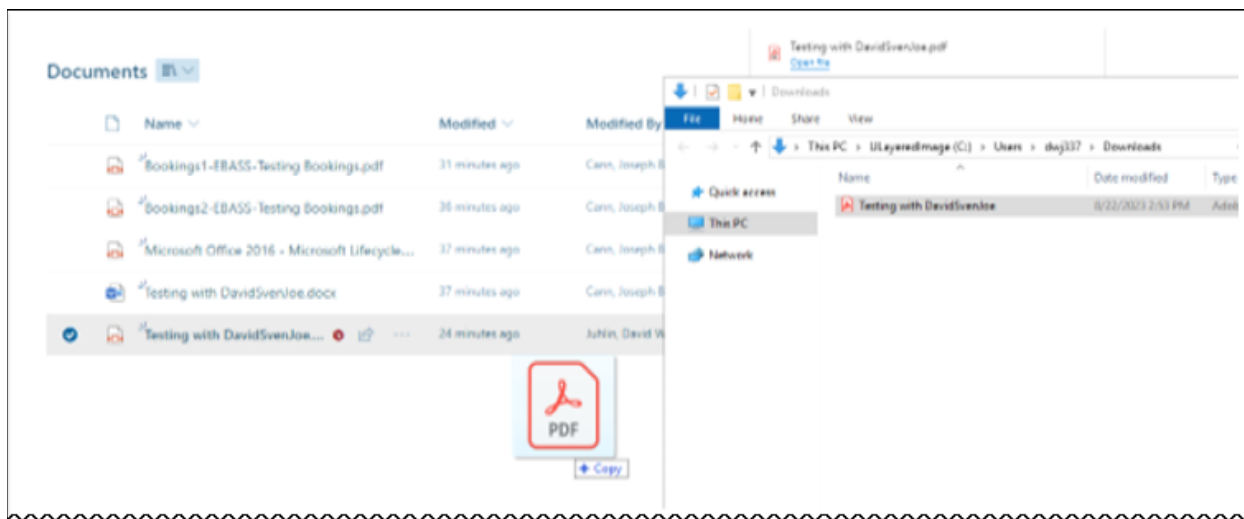


D. When prompted to replace the existing file, click **Yes**.

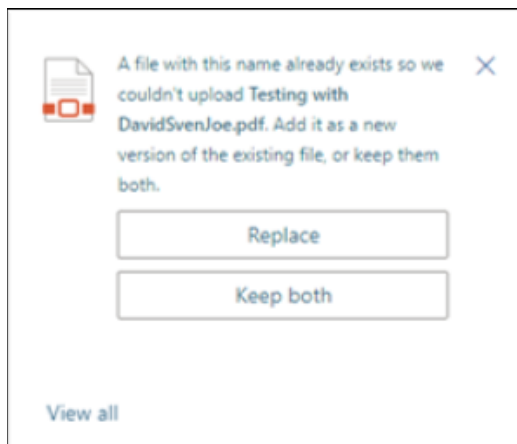


4. Replace the document.

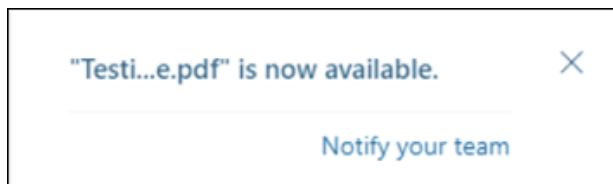
A. Click and drag the document from the folder back to the same location on the SharePoint site.



B. When prompted to *Replace* or *Keep both*, click **Replace**.

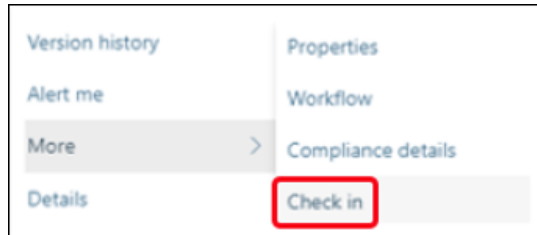


C. SharePoint will indicate when the upload/replace is complete.



5. Check the document back in.

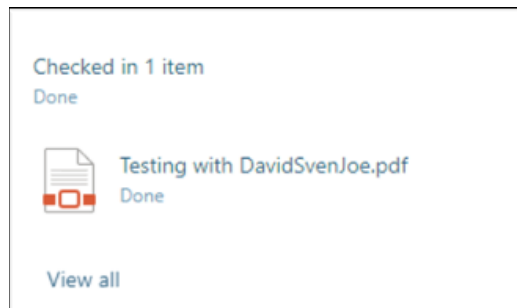
A. Once you finish, check in the document so it is ready for the next step. On the SharePoint site, right-click the document name, then select **More** and **Check in**.



B. Add a comment regarding your changes and click **Check in**.



C. SharePoint confirms the check in.



6. Delete the downloaded document.

A. Once you copy the document back to SharePoint and check it back in, delete it from the Downloads directory.

7. Route the encounter to the provider with a note that the document is located in the SharePoint folder.

Providers – Complete and Sign the Document, Route to Clinical Pool

Important The preferred method for accessing the SharePoint sites is via the Citrix Virtual Desktop. To access the Citrix Virtual Desktop, log in to Citrix from the **Health Link (Citrix Gateway)** link on the U-Connect landing page. Then click the **Desktop** icon to get to the UWH Virtual Desktop.

1. Complete and sign the document (see **Clinical Staff – Electronically Complete the Form** section above.).



Caution If saving an image of a signature, make sure it is only saved to the H: drive. It should be in a location where only you can access it.

2. Save the completed document, adding “**Done**” to the end of the file name, e.g. *041420SmiJohDone*.

3. Route the encounter back to the clinical staff pool indicating the form is complete.

Designated Clinic Staff – Verify, Send to Patient and/or Chart, Delete PDF

1. Verify all elements of the form are complete.
2. Determine if the document needs to be sent to the patient.
 - A. If via MyChart, route a message to the patient with the document attached.
 - B. If via paper, print the document and follow existing workflows to mail or manually hand the paper to the patient.
 - C. If via email/fax, attach the document to the email message or print to RightFax.
3. If the document should be added to the patient’s chart, download it from the *_Send to HIM* folder to the H: drive.
4. Follow the documented processes to sweep the document into Solarity.
5. Delete all versions of the PDF from SharePoint.

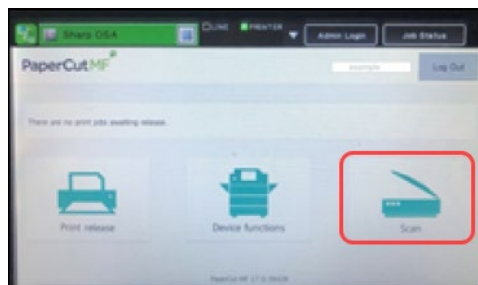
Scanning and Saving a PDF

Documents that exist on paper need to be scanned to a PDF and saved to your H: drive from the multifunction copy device. The document is then moved to the department’s SharePoint Site.

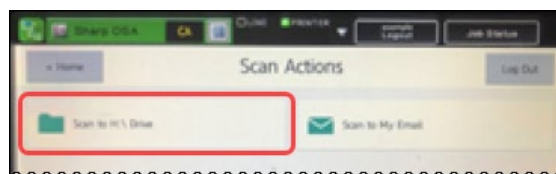
1. Place the document to be scanned on the multifunction copy device.
2. Log in to the device by scanning your badge or use the keyboard to enter your credentials.



3. Tap **Scan**.



4. Tap **Scan to H: Drive**.





Important To keep PHI out of email, it is recommended to send the document to your H: drive rather than your email.

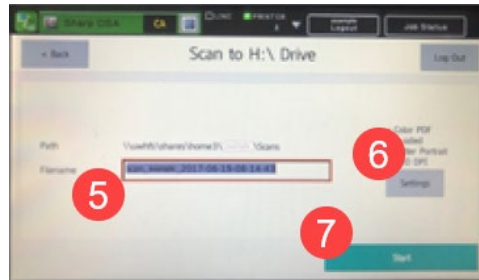
5. In the *File name* field, use the keyboard to enter the name of the file.



Important The file name should follow the naming standard: Date (MMDDYY), first 3 letters of the patient’s last name, first 3 letters of the patient’s first name.
For example, a PDF for John Smith: 041420SmiJoh

6. If the document is two-sided, click **Settings** to update the settings appropriately.

7. Tap **Start**.

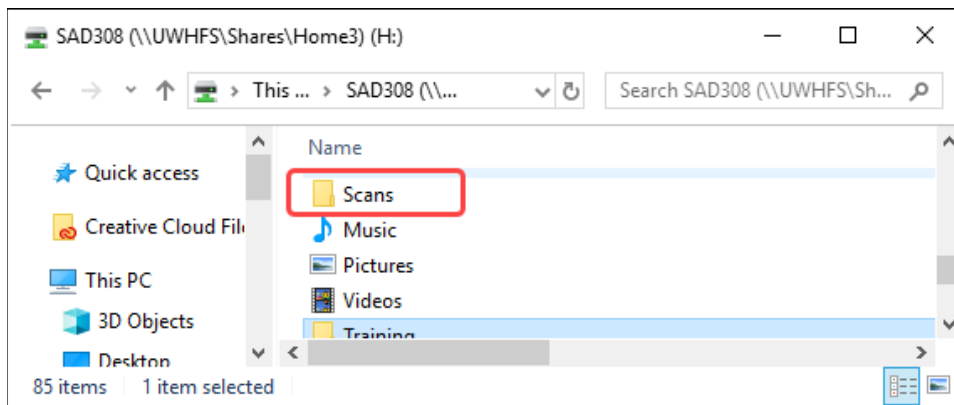


8. The document is scanned and will be saved to your personal H: drive. You will receive an email letting you know the scan is in your H: drive.

9. To access your H: drive, from the desktop, click **This PC**.

10. Under Network Locations, double-click the **H: drive**. It will list your user ID.

11. Navigate to and double-click the **Scans** folder.



Note It is recommended that you create a folder specific for this process and save the document to that folder. The folder should be cleaned out regularly.

Completing a Form Sent in MyChart

Patients may send their forms to the clinic as an attachment via their MyChart account. Follow the steps below to complete these forms.

Clinical Staff

1. Patient sends the form as an attachment via a MyChart Message.
2. Determine:
 - If the form can be completed electronically, for example, if the patient sent a PDF. Continue with this workflow.
 - If the form cannot be completed electronically, for example, if the attachment is a picture of the form. Print the attachment and follow the workflow for a printed document.
3. With the PDF open, save a copy of the document to the H: drive. Follow steps outlined in the **Completing a Paper Form** section of this document to move the document to SharePoint and complete the form as needed.
4. Route the encounter to the provider with a note that the document is saved to the shared folder.

Providers

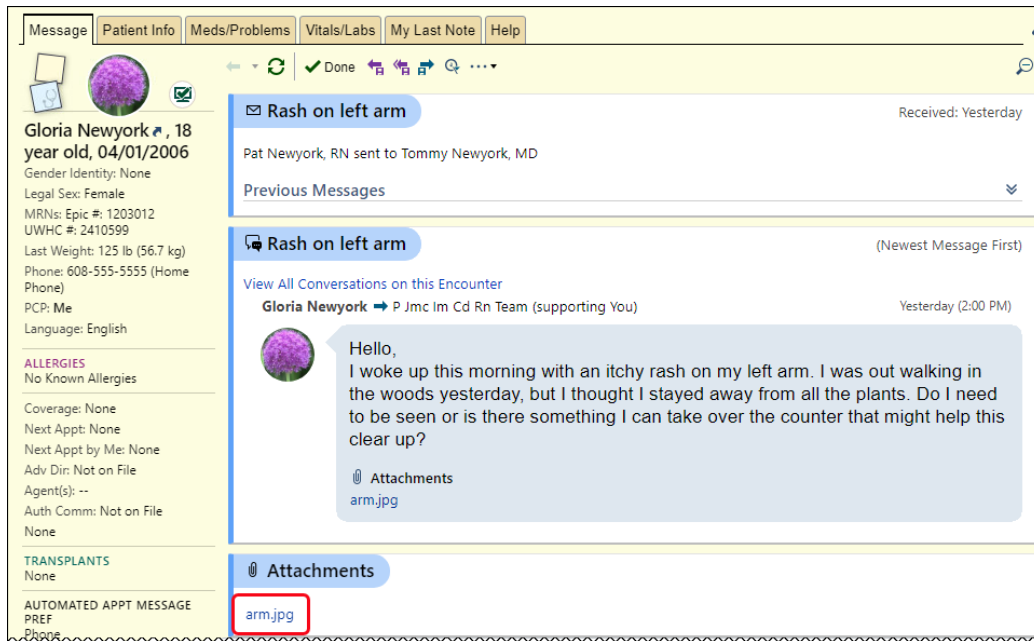
1. Complete and sign the document following the steps above.
2. Save the completed document, adding "**Done**" to the end of the file name, e.g. *041420SmijohDone*.
3. Route the encounter back to the clinical staff pool indicating the form is complete.

Clinical Staff

1. Verify all elements of the form are complete.
2. Determine if the document needs to be sent to the patient via MyChart.
 - If yes, save the document to your H: drive and route a message to the patient with the document attached.
 - If no, print the document and follow existing workflows to mail, fax, or return the document to the patient.
3. Copy the completed file to the _Sent to HIM folder. This step is not necessary if the document is sent to the patient via MyChart.
4. Delete all versions of the PDF from the H: drive.

Saving the Document to the H: Drive from a MyChart Message

1. From the MyChart Message, click to open the patient attachment.



2. From the PDF, click **File > Save As**.
3. From the *Save As* window, select **the H: drive** and the appropriate sub folder, if applicable.
4. In the *File Name* field, name the attachment using the standard naming convention.
5. Click **Save**.
6. If necessary, complete any fields in the document and click **Save**.
7. Continue with steps outlined in the **Completing a Paper Form** section above.

Returning the Form to the Patient Via a MyChart Message

Clinical Staff can send the attachment to the patient via a MyChart message. This may be from an existing encounter, for example, the patient sent the form via MyChart or by using the Patient Message button to send a new message and attachment to the patient.



Important It is not currently possible to send an attachment to patient from within a MyChart Message encounter. Attachments must be sent to the patient from within the In Basket using the Reply to Patient button or via a Patient Message.



Caution Users cannot see the U: drive from Health Link. In order to upload an existing document, it must be moved to the H: drive. If you do not have an H: drive, your manager can request access via a Computer Systems Access Request (CSAR).

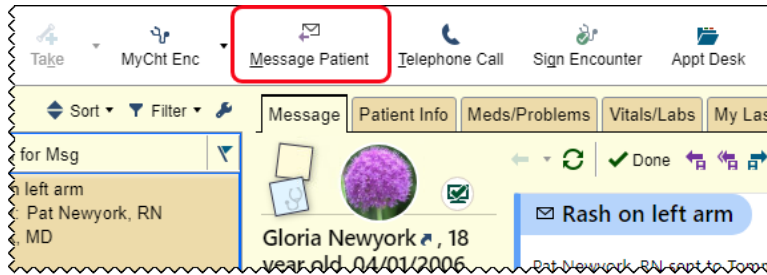


Find more on U-Connect If a document needs to be sent urgently, print the document and follow the Media Manager Scanning workflow. For more information, search U-Connect for **“Media Manager Scanning.”**

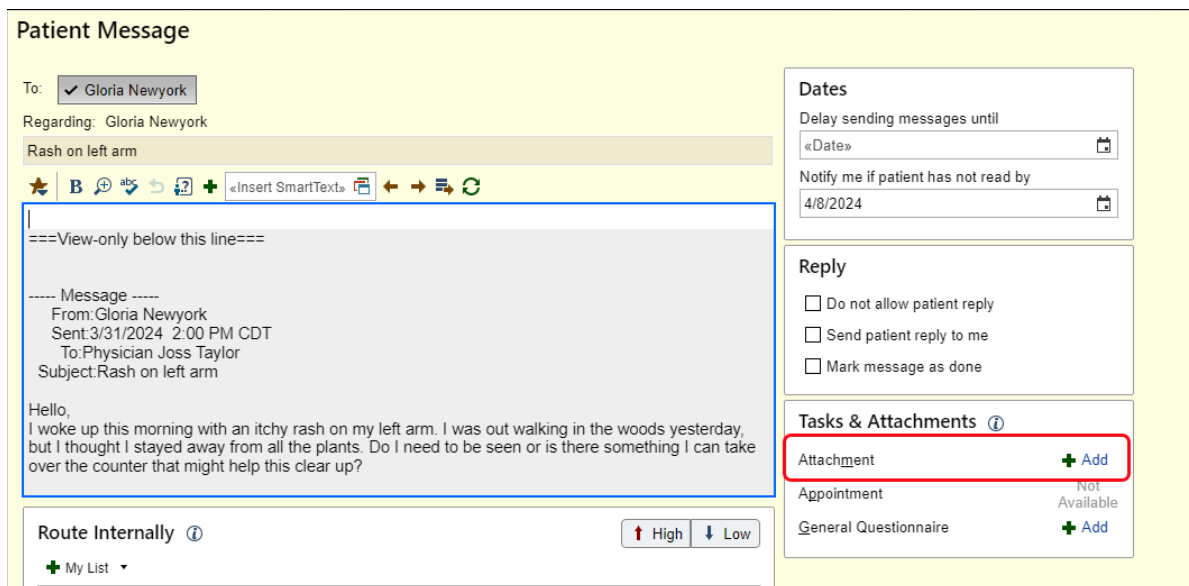
Sending an Attachment in an Existing MyChart Encounter

If the patient has an open MyChart Message encounter with a message in the In Basket, respond using **Message Patient**.

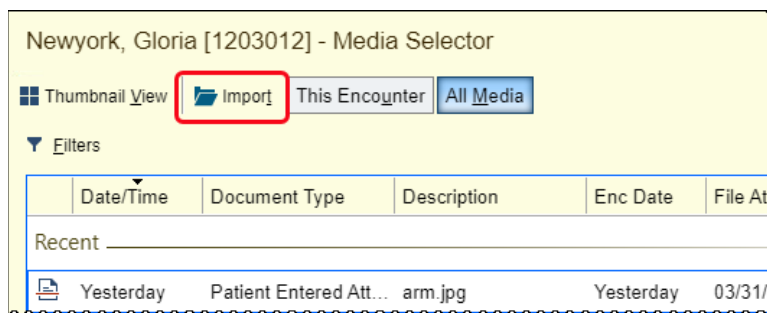
1. From the *MyChart Messages* folder, select the message.
2. Click **Message Patient**.



3. From the Patient Message, in the *Tasks & Attachments* section, click **Add**.



4. In the *Media Selector* window, click **Import**.



5. Navigate to the location of the saved document and select the completed form.



Important Once the document has been uploaded, delete it from your H: drive.

6. Click **Accept**.
7. The attachment appears. Complete the message as needed.

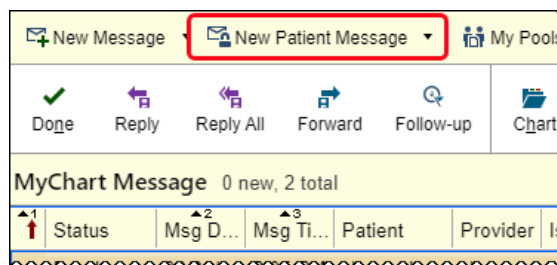


8. Click **Send**.

Sending an Attachment to a Patient Outside of a MyChart Encounter

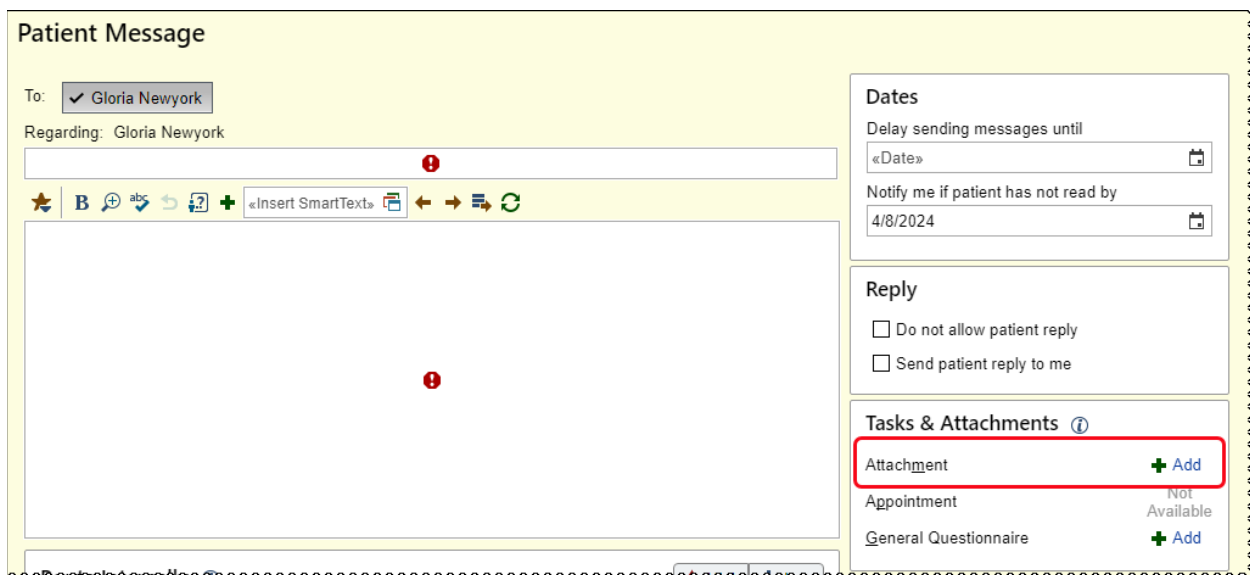
If no MyChart encounter exists in the In Basket for the patient, use the Patient Msg button to send an encounter. When clinical staff send these messages, a MyChart Message encounter opens in their name. They need to update the encounter provider after sending the message.

1. From the In Basket toolbar, click **New Patient Message**.



2. In the *Patient Lookup* window, search for the patient.

3. In the *Patient Message* window, add the attachment as described above and complete the message.

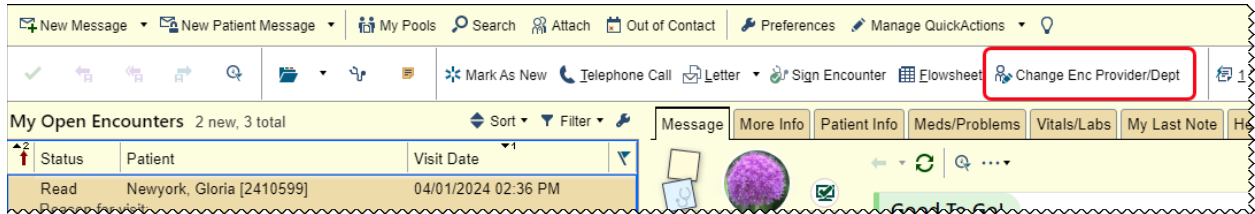


4. Click **Send**.

5. Clinical staff need to change the encounter provider. Navigate to the **My Open Encounter** folder.

6. Select the MyChart Message encounter opened under your name. You are listed as the Provider.

7. Click **Change Enc Provider/Dept**.



8. In the *Change To* field, enter the correct provider. Click **Accept**.

A screenshot of a 'Change Provider' dialog box. The title bar says 'Change Provider' with a close button (X). The main text reads 'MyChart Message for Newyork, Gloria in JUNCTION RD INT MED CD'. Below this, it shows 'Current Provider: Tommy Newyork, MD'. There are two input fields: 'Change To' and 'Department'. The 'Change To' field is highlighted with a red rectangle and contains the text 'WISCONSIN, TOMMY' with a search icon to its right. The 'Department' field contains '«JUNCTION RD INT ME...' with a search icon. At the bottom right, there are two buttons: 'Assign Provider' (with a green checkmark icon) and 'Cancel' (with a red X icon).