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Searching/Viewing Documents

When Viewing the Resident Documents page you will only see the <u>Types</u> in which there are documents. Click on the + next to the Type to view the documents. This page will display the 20 most recently attached documents of each Type.

| Corporate | Messages | Resident | Reports | Facility | RAI | Provider | | |
|---------------|------------|----------|---------|----------|-----|----------|---------|-------------------|
| Reside | nt Docu | ments | | | | | | |
| 🗄 📥 <u>Jo</u> | nes, Linu | <u>s</u> | | | | | | <mark>ê⇔</mark> ê |
| 20 Most | Recent Do | cuments | • | | | | | |
| 🗄 Filter Op | tions | | | | | | Add New | Document |
| Expand All | Collapse A | Ш | | | | | | |
| E Cons | ults/Refer | rals | | | | | | |
| E Flow | rsheets | | | | | | | |
| | | | | | | | Report | Download |

A Filter Option is available at the top of the page to Search Documents. Click on the + sign to open the Filter Options. Search on the dates, title, format (PDF) or types of documents. You can also search for Removed documents. After clicking on Search, the page will list only the documents that meet the Filter criteria options.

| Corporate Messages Reside | nt Reports Facility RA | I Provider | | |
|----------------------------|--|--|--|---|
| Resident Document | s | | | |
| 🗄 🚔 Jones, Linus 💊 | | | | <mark>8⇔8</mark> |
| 20 Most Recent D cument | 5 | | | |
| Filter Options | | | Add | New Document |
| Document From Date: | | | Document To Date: | |
| Attached From: | | | Attached To: | |
| Title: | | | PDF Only: | [] |
| Search Document. Type: | Accounts Receivable Assessments Discharge Documents Discharge Documents Medicare Certs. and Recerts. Recerts. Recerts. | Admission Agr Addendums Addendums Aduthorizations, Flowsheets Insurance Care Orders Orders Therapy and Re | eements and /Consents ds/Verifications estorative Documents | Check all Clear all Chack Advance Directives Consults/Referrals History & Physical Lab Progress Notes |
| Include Removed Documents: | | | | Search |
| Expand All Collapse All | | | | |
| Consults/Referrals | | | | |
| Flowsheets | | | | |

To view the document click on the *Title* of it and the PDF will open in a new window.



If you click on the word **View**, you will be able to *edit* the information about the document i.e., the title, attach orders or remove the fax.

| Corporate Messages | Resident R | eports | Facility | RAI | Provider | | | | |
|---------------------|------------|------------|-----------|-------|------------|-----------------|------------------|---------------------|---|
| Resident Docun | nent | | | | | | | | |
| 🗉 🖰 Jones, Linus | | | | | | | | | |
| Title: | Pharmacy (| Consult | Review 3/ | 20/13 | | Confidential: | No | | |
| Document Type: | Consults/R | eferrals | | | Docum | ent File Name: | 172854.pdf | | |
| Comments | | | | | | | | | |
| Document From Date: | | | | | Docu | ment To Date: | | | |
| Attached Date: | 04/01/2013 | 3 04:20 | PM | | | Attached By: | Belinda Training | | |
| Last Modified Date: | | | | | Las | st Modified By: | | | |
| | | | | | | | Back Edit | | |
| Associated Orders | | | | | | | Associate Orders | - | |
| Document/Pages | | | | | | | Remove Document | I | |
| first previous of 1 |) next | () last | left | right | view docum | nent | | | |
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| | | | | | | | | | - |

You can run a report of multiple documents selected from the Resident Documents page by clicking the checkboxes next to them. All selected documents (**PDF's only**) will be combined into a single PDF. When you click on Report you will be given an option to Open or Save the report.

| orporate Mes | sages Re | sident Repor | ts Facility RAI | Provider | | |
|------------------|------------|------------------|--------------------------------|----------|--------|----------|
| Resident I | Documo | ents | | | | |
| 🗉 📥 Jones, | Linus | | | | | |
| 20 Most Rece | ent Docun | ients | | | | |
| E Filter Options | | | | | Add Ne | w Docume |
| Expand All Col | lapse All | | | | | |
| Consults | /Referral | s | | | | |
| From Date | To Date | Attached Date | Title | POF | Commen | ts |
| V | | 04/01/2013 | Pharmacy Consult Re 3/20/13 | view 🗸 | | |
| Check All Clea | r All | | | | | |
| Hospital | Paperwo | rk | | | | |
| 🗖 Lab | | | | | | |
| From Date | To Date | Attached Date | Title | PDF | Commen | ts |
| V | | 04/02/2013 | CBC 4/2/2013 | 4 | | |
| Check All Clea | ir All | | | | | |
| C Therapy | and Resto | orative Docun | nents | | | |
| | | | | | Report | Down |



If you select Open, the report will open with the documents selected. If you select Save, you will need to save the report in a file **on your NETWORK Drive (Your H drive), NOT** on your desktop or C drive since it contains PHI.



You also have the option of "downloading" items instead of running a report. You will be given the same option to Open or Save the report.

Manage Documents & Faxes Page

Manage Documents & Faxes contains documents that need to be attached.



Documents can be deleted from the system by checking the box (or select All at the bottom of the page) and then click on Delete at the top of the page. To only *View* the document, click on the Title of it. To Attach it, Click on Edit/Attach.

| Corporate | Messages | Resident | Reports | Facility | RAI | Provider | | | | |
|-----------|----------------|--------------------------|------------|----------|--------|----------|------|----------------------------|-------------------------------|------------------|
| Mana | ge Docur | nents & | Faxes | | | | | | Te | <u>each Me</u> 📮 |
| The do | cuments/faxes | below require | attention. | | | | U | pload New Docur | nent | Delete |
| Re | ceived Date/Ti | ime 會 🛛 Tit | le Fi | le Name | Source | e Cate | gory | From/ Fax Number | Pages Unassigned /Total | Edit/ Attach |
| 04/ | 01/2013 04:0 | 5 PM Fax 17285 | 1728 | 353.pdf | Fax | Clinica | | Local Lab 614-888- 6864 | 1/1 | Edit/Attac |
| 04/ | 01/2013 04:0 | 5 PM Fax 17285 | 1728 | 352.pdf | Fax | Clinica | Г | Local Lab 614-888- 6864 | 1 / 1 | Edit/Attac |
| 04/ | 01/2013 04:04 | 4 PM Fax 17285 | 1728 | 350.pdf | Fax | Clinica | | Local Lab 614-888- 6864 | 1/1 | Edit/Attac |
| 09/ | 26/2012 12:4 | в РМ <u>Fax</u> 14736 | 1473 | 861.pdf | Fax | Clinica | I | Local Lab 614-888- 6864 | 11/11 | Edit/Attac |
| 11/ | 02/2011 12:4 | 9 PM Fax | 3 1094 | 43.pdf | Fax | Clinica | | 614-885-1201 | 2/2 | Edit/Attac |

This will take you to the page to Edit or Attach. <u>Edit</u> is used to change the document *Category* (for now we are only using the *Clinical* Category) or add comments to further describe what the fax is. You will be able to add comments on the individual document at the time you are attaching it to the specific resident.

| Corporate | Messages | Resi | dent | Reports | Facility | RAI | Provid | ler | | | | |
|---------------------|--------------|------|-----------|------------|----------|-------|--------|---------------------|-------|---------------------|--------------|-----|
| Edit/A | ttach Do | cun | nent | s & Fa | xes | | | | | | | |
| Docume | nt & Fax In | form | ation | | | | | | | | | |
| | Ti | tle: | Fax 14 | 7361 | | | | Confiden | tial: | No | | |
| | File Nar | ne: | 14736: | 1.pdf | | | | Sou | rce: | Fax | | |
| Recei | ved Date/Tir | ne: | 09/26/ | 2012 12:4 | 48 PM | | | From/Fax Num | ber: | Local La 614-888 | ib 3-6864 | |
| Docume | ent Category | (s): | Clinical | | | | | Pages Unassigned/To | tal: | 11 / 11 | | |
| | Commer | nts: | | | | | | | | | | |
| | | | | | | | | Back Ed | lit | Atta | ch Docum | ent |
| ∢ first µ | orevious of | 11 |) next | () last | left | right | view d | delete delete | all | | | |
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| 1 64 | | | | | | | | | | | | 4 |
| | SEP-26- | 2012 | 13:49 | (| PRS | | | | 61488 | 386864 | P.01 | |

You also have the ability to upload documents (.DOC, .DOCX, .XLS, .PDF, .TIFF, .JPEG) up to 50 MB in size (from 10 MB) into the Manage Documents & Faxes are for the Facility. Click on Upload New Document.

| Corporate | Messages | Resident | Reports | Facility | RAI Pr | ovider | | 1 | | |
|-----------|----------------|--------------|------------|----------|--------|--------|-------|-----------------|---------------------|-----------------|
| Manag | e Docum | ients & | Faxes | | | | | | Te | <u>ach Me</u> 📃 |
| The doc | uments/faxes b | elow require | attention. | | | | U | pload New Docun | nent | Delete |
| Rec | eived Date/Tin | ne 會 🛛 Titl | le Fil | le Name | Source | Cate | egory | From/ Fax | Pages Unassigned | Edit/ Attach |

You can now select the file(s) to upload by clicking on Browse, select the file and click on Open. Give the document a title i.e., March Therapy Logs (you will be able to title it specifically when it's attached to a resident) and select the Clinical Category box, then click Upload.

| Corporate Messages Resi | dent Reports Facility RAI Provider |
|-------------------------|--|
| Upload Document | |
| File to be Uploaded: | BROWSE Pages from 6.6_MatrixCare (2MB) |
| Title: | Multiple Page Example Upload |
| Document Category: | V Clinical |
| Comments: | |
| | Cancel Unload |

The file will upload and you will be taken back to the Manage Documents & Faxes page.

| Manage Docu | ments & F | axes | | | | Tea | ich Me 🧾 |
|---------------------|--|---|----------|-----------|------------------------|-------------------------------|--------------------|
| Successful Upload | ls = 1 Failed (| Jploads = 0 | | | | | |
| The documents/faxes | below require at | cention. | | Upload Ne | ew Docum | ient | Delete |
| Received Date/1 | Time 😭 🛛 Title | File Name | Source | Category | From/ Fax Number | Pages Unassigned /Total | Edit/ Attach |
| 04/02/2013 02:5 | 58 PM <u> Multiple</u> <u> Page</u> <u> Example</u> <u> Upload</u> | Pages from 6.6_MatrixCare_Clinical.pdf | , Upload | Clinical | | 12/12 | <u>Edit/Attach</u> |
| 04/01/2013 04:0 | 06 PM Fax 172853 | 172853.pdf | Fax | Clinical | Local Lab 614-888- | 1 / 1 | Edit/Attach |

Attaching Documents

To attach a document, click on Edit/Attach for that document from the Manage Documents & Faxes page. Then click on Attach Document.

| dit/Attach Docu | ments & Faxes | | |
|-----------------------|--|---------------------------|-----------------|
| ocument & Fax Inform | nation | | |
| Titles | Multiple Page Example Upload | Confidentiali | No |
| File Name: | Pages from 6.6_MatrixCare_Clinical.pdf | Sources | Upload |
| Received Date/Time: | 04/02/2013 02:50 PM | From/Fax Numbers | |
| Document Category(s): | Clinical | Pages Unassigned/Total: | 12 / 12 |
| Comments: | | | |
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The Attach Documents & Faxes page appears. Select the Resident the document is to be attached to and then edit the Title as appropriate and select the correct Type of document (see list at the end, you now have many different *Types* of Documents to assign the fax, or uploaded document to).

| Sele Dout Hold Title: Marc Type:S Document From Date: Adm Comments: Adv Comments: Adv Comments: Flow Drders Flow | elect All ble-click or use the arrow buttons to s down 'Ctrl' key to select multiple cho ch 2013 Therapy Log | elect choic ices | | | |
|--|---|---------------------|----------------------|-----------------------------|-------------|
| Type: S Document Acco From Date: Adm Comments: Asse Orders Flow | elect Ope | | | | |
| Document Accc From Date: Advi Comments: Association Orders Flow Hist | aloc one | • | | | |
| Comments: Adv. Asse Auth Con: Disc Orders How Histo | elect One ounts Receivable hission Agreements and Addendums | | Document To Date: | | |
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| 1103 | sharge Documents /sheets ory & Physical pital Paperwork | | | Assoc | iate Orders |
| Document/P Insu | irance Cards/Verifications | | | | |
| Drag pages to re Lab | | You car | n view a page by c | licking on the page number. | |
| Current Pages: Med | care Certs. and Recerts. | | | | |
| Remove All Proc | ers Tress Notes | | | | |
| Radi | iology | | | | |
| Ther | rany and Restorative Documents | | | | |
| | Taby and Restorative Documents | | | Cancel | Save |

The Document From and To Date fields are required but the Comment field is not required. The remaining process of attaching (single or multiple pages) is the same as usual. If you attached only some of the pages, you will stay on the Attach Documents & Faxes page so you can continue to attach the rest of them.

| orporate M | essages Re | sident Reports Facility RAI Pro | vider | | | | | | |
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| Attach D | ocument | s & Faxes | | | | | | | |
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| Page(s) as | k Eav Inform | nation | | | | | | | |
| ocument e | Title: | Multiple Page Example Upload | | Confidential | No | | | | |
| | File Name: Pages from 6.6 MatrixCare Clinical.ndf Source: Unload | | | | | | | | |
| Received | Date/Time: | 04/02/2013 02:58 PM | Fro | m/Fax Number: | | | | | |
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| Attach Resi | dent Docum | ent | | | | | | | |
| Resident: | apple, rose ball, joe (1) Bird, Anton Black, Jaco Blow, Josep Blue, Bird (Booth, See Brennan, T brewer, pel Select All Double-click Hold down 'C | - percert Kesidents | >>> <<< | Jones, Linus (1 | 502066) | | | | |
| Title: | March 2013 | Therapy Log |] | | | | | | |
| Type: | Therapy an | d Restorative Documents 🔹 | | | | | | | |
| Decument | Document To Date: | | | | | | | | |
| From Date: | | | | | | | | | |

Uploading

Documents to a Specific Resident

The process for uploading a document to a specific resident hasn't changed. From the Resident Documents page click on Add New Document.



You will be able to browse to find the document then add the Title and Type and click on Upload or Upload and New to add another one.

| Corporate Messages Resi | ent Reports Facility RAI Provider |
|-------------------------|-----------------------------------|
| Upload Resident D | ocument |
| 🗄 🖆 Jones, Linus | |
| File to be Uploaded: | Browse |
| Title: | |
| Document Type: | Select One |
| Document From Date: | Document To Date: |
| Comments: | * |
| | Cancel Upload Upload & New |

Associating Orders to Documents

To associate Orders to documents, click on the Associate Orders button. A list of the current and discontinued Orders within 30 days appears. Scroll through to check the boxes you want to associate the Order to and click Save.

| 🗄 🖰 <u>Jones, Linus</u> | | | |
|-------------------------|----------------------|---------------------|------------------|
| Title: | CBC 4/2/2013 | Confidential: | No |
| Document Type: | Lab | Document File Name: | 172850.pdf |
| Comments: | | | |
| Document From Date: | | Document To Date: | |
| Attached Date: | 04/02/2013 03:41 PM | Attached By: | Belinda Training |
| Last Modified Date: | | Last Modified By: | |
| | | | Back Edit |
| Associated Orders | | | Associate Orders |
| Document/Pages | | | Remove Document |
| first previous of 1 | next last left right | 1 | |

Ohio Living MatrixCareCareCare System Resident Documents - Nursing

| Туре | Description | Start Date | End Date | Flow Sheet | Ordered By | Associate |
|--------------|--|------------|------------|--------------------|-----------------|-----------|
| Prescription | Miacalcin Nasal (calcitonin) spray; 200 intl units/inh; amt: 2 sprays; nasal | 10/04/2012 | Open Ended | Medications | JOHN PHYSICIAN | |
| Prescription | Nitroglycerin (nitroglycerin) tablet; 0.4 mg; amt: 0.4mg; sublingual | 08/19/2011 | Open Ended | PRN Medications | JOHN PHYSICIAN | |
| Prescription | Percocet 5/325 (acetaminophen- oxycodone) - Schedule II tablet; 325 mg-5 mg; amt: 1 Tablet; oral | 10/04/2012 | Open Ended | PRN Medications | JOHN PHYSICIAN | |
| Prescription | Tylenol (acetaminophen) [OTC] tablet; 325 mg; amt: 650 mg; oral | 08/22/2011 | Open Ended | PRN Medications | JOHN PHYSICIAN | |
| General | Apply Barrier Cream to peri area after each incontinent episode | 10/04/2012 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Calmoseptine to excoriated buttocks once per shift until healed | 08/22/2011 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Lasix 20mg poBid | 05/08/2012 | Open Ended | Medications | JOHN PHYSICIAN | |
| General | Pressure sensor alarm to bed and chair, check placement and function q shift and as needed. | 10/14/2011 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Test category | 01/24/2012 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Transfer with gait belt and wheeled walker | 01/24/2012 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Up with one assist | 01/25/2012 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Up with walker only | 10/11/2011 | Open Ended | Treatments | JOHN PHYSICIAN | |
| General | Nursing Order here | 11/07/2011 | Open Ended | General | Belinda R Jones | |
| General | Profile order example | 05/30/2012 | Open Ended | General | Belinda R Jones | |
| Lab | CBC No DIFF | 04/02/2013 | 04/02/2013 | Treatments | JOHN PHYSICIAN | V |

When you view the Order, there will be a link to go directly to the Document.

| Corporate | Messages | Reside | t Reports | Facility | RAI | Provide | • | | | |
|---------------|---------------|--------------|----------------------|--------------|--------|------------|-------------|------------|-------------------------|-----------|
| View L | ab Orde | r | | | | | | | | |
| ± 💪 <u>Jo</u> | nes, Linu | 5 | | | | | | | | |
| | | | | | | | | * <u>v</u> | iew Associated Resident | Documents |
| | Allergie | s: Aspir | n) Keflex) Oxy | codone; PC | N; Cat | 5; | | | | |
| Order In | formation | | | | | | | | | |
| | Received Date | e: 04/02 | /2013 | | | | Rece | ived By: | Belinda R Jones RN | |
| Co | rporate Mes | ages R | sident Repor | ts Facility | RAI | Provider | | | | |
| A | ssociated | Resid | ent Docur | nents | | | | | | |
| H | B 📤 Jones, | <u>Linus</u> | | | | | | | | |
| Γ | | Type: | Lab | | | | | | | |
| | St | art Date: | 04/02/2013 | | | | End Date: | 04/02/20 | 13 | |
| | De | scription: | CBC No DIFF | | | | | | | |
| C | Documents A | ttached 1 | o Order: | | | | | | | |
| | Test | | From Date To Date | Attached Dat | e Docu | iment Type | Title | • | Comments | |
| | CBC No DIFF | | | 04/02/2013 | Lab | | CBC 4/2/201 | 3 | | |
| - | | | | | | | | | Back | I |

Removing Documents

You can remove entire Documents (or pages from PDF or TIFF) from the resident's record. Once a page is removed, it is stored in MatrixCareCare so you can still access it to reattach if necessary. If the document was imported via Manage Documents & Faxes page (ever resided there), it will appear again there to be reattached to a different resident.

Click on View for the specific document from the Resident Documents page and click on Remove Document.

| Corporate Messa | ges | Resident | Reports | Facility | RAI | Provider | | | | |
|-----------------|---------------------------|-----------|----------------------------------|------------|--------|-------------------|---------|---------|------------------|--------------|
| Resident Do | ocun | nent | | | | | | | | |
| 🗄 🐣 Jones, L | inus | | | | | | | | | |
| | Title: | Februar | / 2013 MA | R | | | Confide | ential: | No | |
| Document | Document Type: Flowsheets | | Docum | ent File M | lame: | 109442.pdf | | | | |
| Comn | nents: | | | | | | | | | |
| Document From | Date: | | | | | Docu | ment To | Date: | | |
| Attached | Date: | 03/29/2 | 03/29/2013 05:09 PM Attached By: | | ed By: | Belinda Jones | | | | |
| Last Modified | Date: | | | | | Last Modified By: | | ed By: | | |
| | | | | | | | | | Back | Edit |
| Associated Ord | ers | | | | | | | | Asso | ciate Orders |
| Document/Page | 25 | | | | | | | | Remov | e Document |
| first previous | 1 of 1 |) next | () last | left | right | view docur | nent | | | |
| | | | ₽ Z | 1 / 1 | ۲ | • I) | 1 | œ | • 102% • | - 🔬 - 🥖 |

You will have to enter the Reason the document is being removed.



If the document had multiple pages, you will be able to remove one or multiple pages.



You will then be given the option to Reattach the document.

| V IVIALID | care olo nesidenti Jones, Linus | | 20 | <u> </u> ∞ | . og c |
|---------------------|---------------------------------|---------------------|-------------------|------------|--------|
| Removed Resid | ent Document | | | | |
| 🗄 🖆 Jones, Linus | | | | | |
| Title: | February 2013 MAR | Confidential: | No |] | |
| Document Type: | Flowsheets | Document File Name: | 109442.pdf | 1 | |
| Comments: | | | | 1 | |
| Document From Date: | | Document To Date: | | 1 | |
| Attached Date: | 03/29/2013 05:09 PM | Attached By: | Belinda Jones |] | |
| Last Modified Date: | | Last Modified By: | | 1 | |
| Removed Date: | 04/02/2013 03:53 PM | Removed By: | Belinda Training |] | |
| Removed Reason: | Wrong Resident | | |] | |
| Reason Note: | | | |] | |
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| Associated Orders | | | | | |
| Document/Pages | | | Reattach Document | | |
| first previous of 1 | Next last left right | view document | | | |
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To view removed documents, you need to select Include Removed in the Filter Option when searching.

| Filter Options | | | | | Add | New Docum | ent |
|----------------------------|---|--|---|--|--|---|---|
| Document From Date: | | | | Doe | cument To Date: | | |
| Attached From: | | | | | Attached To: | | |
| Title: | | | | | PDF Only: | | |
| Search Document Type: | ✓ Accour ✓ Assess ✓ Discha ✓ Hospita ✓ Medica Recerts. ✓ Radiolo | its Receivable iments rge Documents al Paperwork re Certs. and GY | ✓ Admission / Addendums ✓ Authorizatio ✓ Flowsheets ✓ Insurance (✓ Orders ✓ Therapy and | Agreemer ons/Cons Cards/Ver d Restora | nts and ents rifications tive Documents | Check all V Advance Directives V Consults/Re V History & Pl V Lab V Progress No | <u>Clear all</u> aferrals hysical otes |
| Include Removed Documents: | V | | | | | Search | 1 |
| Expand All Collapse All | | | | _ | | | _ |
| Therapy and Restorat | ive Docun | ients | | | | | |
| From To Date Date | Attached Date | Title | : | PDF | Com | nents | View |
| 04 | /02/2013 | March 2013 Thera | py Log | 1 | REMOVED: Wr | ong Resident | View |
| Check All Clear All | | | | | | | |

The document Title will appear and the comments will indicate that it was Removed and note the reason. If you click on View you will be able to Reattach the document.

| | V Dischar | rge Documents | Flowsheets | | | V History & Pl | hysical |
|----------------------------|------------------|------------------------|---------------|-------------------------------|---------------|----------------|---------|
| | V Hospita | I Paperwork | Insurance Car | Insurance Cards/Verifications | | | |
| | Medica | re Certs. and Recerts. | Orders | | | V Progress No | otes |
| | Radiolo | ду | Therapy and R | estorat | ive Documents | | |
| Include Removed Documents: | | | | | | Search | |
| oand All Collapse All | | | | | | | |
| Consults/Referrals | | | | | | | |
| Flowsheets | | | | | | | |
| From To Date Date | Attached Date | Title | | PDF | Comm | nents | View |
| | 3/29/2013 | February 2013 MAR | | 1 | REMOVED: Wro | ng Resident | View |
| ck All Clear All | | | | | | | |
| | | | | | | | |

Report Download

MatrixCare Resident Document "Types" (1/13/14)

Accounts Receivable

- Bed hold
- All notices of non-coverage (ABNs)
- KePro determinations to appeals
- Medicaid cards
- Level of care (9401 for Medicaid)
- PASARR (7000)

Admission Agreements and Addendums

- Admission agreement/contract
- Application for residency
- Personal account authorizations, mail authorizations, etc.
- 5-day chart review (admission chart review for triple check)

Advance Directives

- Power of Attorney for healthcare, financial, dual
- Living Will
- Ohio DNR

Assessments

- Elopement risk
- Toileting and TIAN plans, programs and assessments
- MMSE
- Personal inventory
- Signed CAA's pages from MDS

Audits

- Five day admission audits
- Other audits requested by the DON

Consults/Referrals

- All outside consults (specialists, etc.)
- All ancillary visits (eye, ear, podiatry, dental, etc.)
- Hospice paperwork
- Hospice election of benefits
- Dialysis paperwork
- Pharmacy consult reviews and reports
- Pharmacy recommendations: formulary changes, drug interaction information
- Psych notes and consults
- Referral reports and documents
- Wound care consultants

Dietary

• NAR documents 2/23/2015

- Dietary consults
- Dietary assessments and notes

Discharge Documents

- Master Signature Log
- Mortician Receipt
- Other discharge papers

Flowsheets

- MAR and TAR
- Narcotic sheets

Hospice

• All hospice documentation: Election of Benefits (signed by the resident/family), Notes, Care Plan, etc.

Hospital Paperwork

• All records sent from the hospital after an inpatient stay, outpatient procedure, emergency room visit

History and Physical

• For doctors that don't use Matrix for their H&P and either use another system or still hand write it

Insurance Cards/Verification

- Copies of Medicare, social security and insurance cards
- Eligibility check
- MSP form
- Insurance questionnaire
- Insurance authorizations/insurance certifications

Lab

- Laboratory results
- Immunizations records

Medicare Certs and Recerts

- SNF certifications
- Therapy certifications

Orders

- Prescriptions
- Orders for outpatient therapy, procedures, etc.
- Handwritten doctor's, NP and PA orders
- Orders for DME, prosthetics, etc.

Other (Not to be used after 4/4/13)

• Other forms with no category prior to 4/4/2013

• Anything in "Resident Forms" prior to 4/4/2013

Progress Notes (Previously called Resident Notes)

- Physician notes
- Agency nurse notes
- Downtime progress notes

Radiology

• X-ray, CT, MRI, Doppler, ultrasound, PET scan, etc.

Rehab/Restorative Documents (previously "Rehab", contains all Rehab documents attached prior to 4/4/13)

- Handwritten therapy documentation
- Handwritten restorative documentation
- Therapy logs

Splitting PDF Files Using CutePDF Writer

- 1) Scan in stack of documents (either to a folder or email)
- 2) Open the scanned PDF document
- 3) Identify the page numbers to be included in one document
- 4) Do a File Print on the PDF and Select CutePDF Writer as the printer

5) Select the specific pages to be "printed" to one document in the Pages to Print area of the Print Options box then hit Print

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6) When the Save As box pops up (you may have to minimize the document) enter the name of the file and select the HCHB Scans or MatrixTempScan folder to Save it in then hit Save

7) The file can now be uploaded into either HCHB or MatrixCare into the appropriate medical record