

**Ohio Living  
MatrixCareCareCare System  
Resident Documents - Nursing**

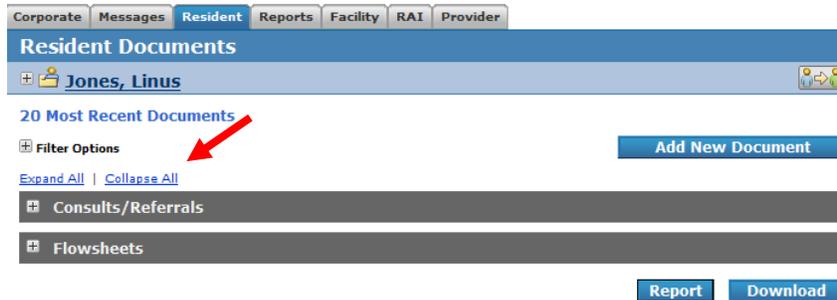
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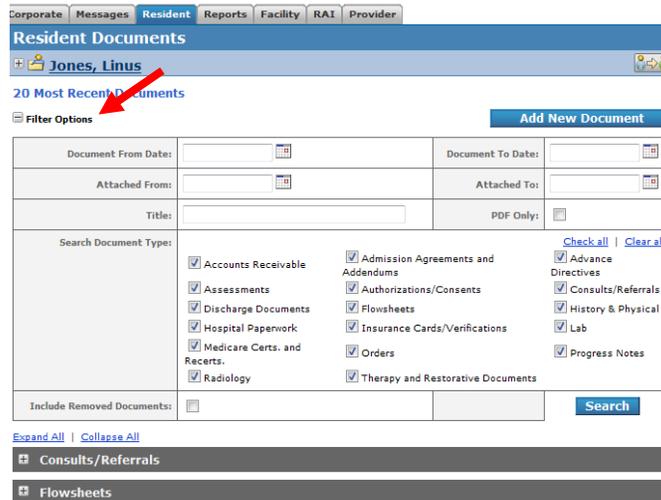
**Ohio Living  
MatrixCareCareCare System  
Resident Documents - Nursing**

**Searching/Viewing Documents**

When Viewing the Resident Documents page you will only see the Types 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.



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.



# Ohio Living MatrixCareCareCare System Resident Documents - Nursing

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

Resident Documents

Jones, Linus

20 Most Recent Documents

Filter Options [Add New Document](#)

[Expand All](#) | [Collapse All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input type="checkbox"/>			04/01/2013	<a href="#">Pharmacy Consult Review 3/20/13</a>	✓		<a href="#">View</a>

[Check All](#) | [Clear All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input type="checkbox"/>			03/29/2013	<a href="#">February 2013 MAR</a>	✓		<a href="#">View</a>

[Check All](#) | [Clear All](#)

[Report](#) [Download](#)

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 Reports Facility RAI Provider

Resident Document

Jones, Linus

Title:	Pharmacy Consult Review 3/20/13	Confidential:	No
Document Type:	Consults/Referrals	Document File Name:	172854.pdf
Comments:			
Document From Date:		Document To Date:	
Attached Date:	04/01/2013 04:20 PM	Attached By:	Belinda Training
Last Modified Date:		Last Modified By:	

[Back](#) [Edit](#)

[Associate Orders](#)

[Remove Document](#)

Navigation: first, previous, 1 of 1, next, last, left, right, view document

1 / 1 102% Sign Find

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.

Corporate Messages Resident Reports Facility RAI Provider

Resident Documents

Jones, Linus

20 Most Recent Documents

Filter Options [Add New Document](#)

[Expand All](#) | [Collapse All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input checked="" type="checkbox"/>			04/01/2013	<a href="#">Pharmacy Consult Review 3/20/13</a>	✓		<a href="#">View</a>

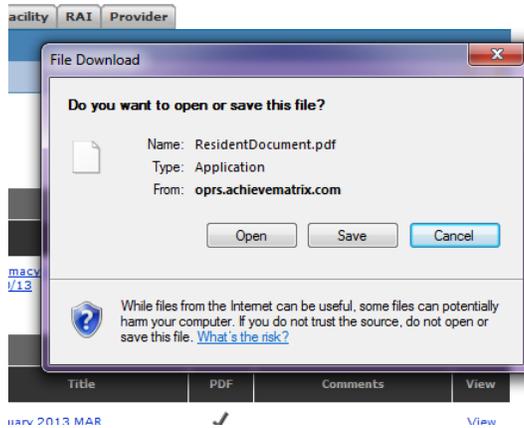
[Check All](#) | [Clear All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input checked="" type="checkbox"/>			04/02/2013	<a href="#">CBC 4/2/2013</a>	✓		<a href="#">View</a>

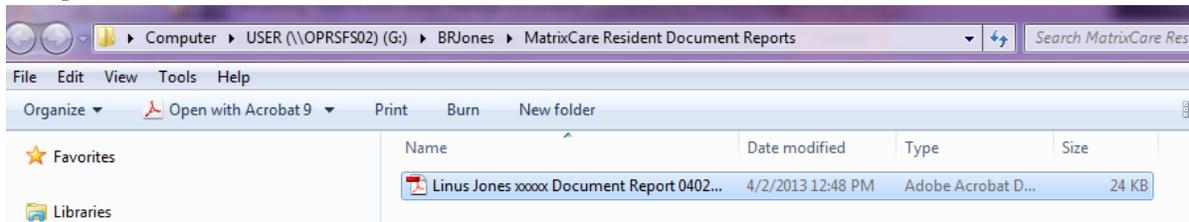
[Check All](#) | [Clear All](#)

[Report](#) [Download](#)

## Ohio Living MatrixCareCareCare System Resident Documents - Nursing



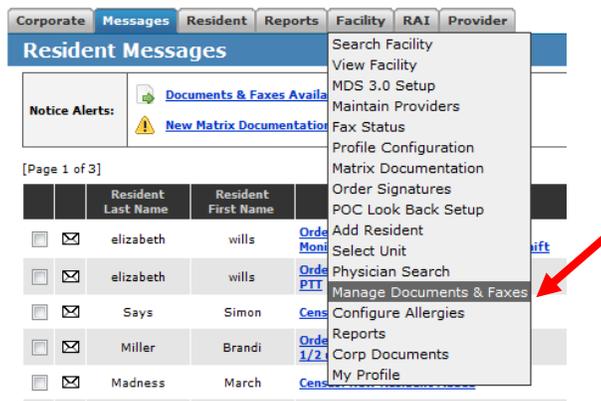
If you select Open, the report will open with the documents selected. If you select Save, you will need to save the report in a file **on your NETWORK Drive (Your H drive), NOT on your desktop or C drive** since it contains PHI.



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.

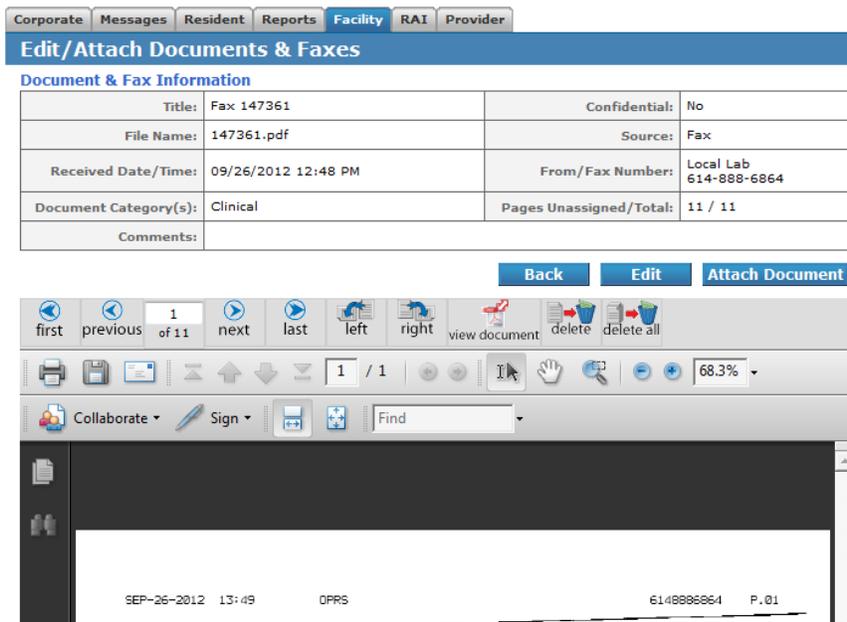


Documents can be deleted from the system by checking the box (or select All at the bottom of the page) and then click on Delete at the top of the page. To only *View* the document, click on the Title of it. To Attach it, Click on Edit/Attach.

# Ohio Living MatrixCareCareCare System Resident Documents - Nursing



This will take you to the page to Edit or Attach. Edit 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.



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 for the Facility. Click on Upload New Document.



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.

## Ohio Living MatrixCareCareCare System Resident Documents - Nursing

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

Received Date/Time	Title	File Name	Source	Category	From/Fax Number	Pages Unassigned/Total	Edit/Attach
04/02/2013 02:58 PM	<a href="#">Multiple Page Example Upload</a>	Pages from 6.6_MatrixCare_Clinical.pdf	Upload	Clinical		12 / 12	<a href="#">Edit/Attach</a>
04/01/2013 04:06 PM	<a href="#">Fax 172853</a>	172853.pdf	Fax	Clinical	Local Lab 614-888-2864	1 / 1	<a href="#">Edit/Attach</a>

### Attaching Documents

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

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).

# Ohio Living MatrixCareCareCare System Resident Documents - Nursing

**Attach Resident Document**

Display only Active Residents

**Resident:**

- Jetson, Coswell (1501822)
- Jetson, Elroy (1501813)
- John, Doe (1502035)
- JOHNSON, JACK (1502133)
- Jones, Tyler (1502153)
- Jones, Joey (1502070)
- Jones, Marybelle (1502045)
- Jones, Barnaby (1501978)
- Kennedy, John (1502165)
- Kiss, Ed (1502039)

----- Selected Residents -----  
Jones, Linus (1502066)

[Select All](#)  
Double-click or use the arrow buttons to select choices  
Hold down 'Ctrl' key to select multiple choices

**Title:** March 2013 Therapy Log

**Type:** -- Select One--

Document From Date:

Document To Date:

Comments:

**Orders**

**Document/Fax**

Drag pages to re-order

**Current Pages:**

- Orders
- Progress Notes
- Radiology
- Therapy and Restorative Documents

[Remove All](#)

[Associate Orders](#)

You can view a page by clicking on the page number.

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.

Corporate Messages Resident Reports Facility RAI Provider

**Attach Documents & Faxes**

**Page(s) assigned**

**Document & Fax Information**

Title:	Multiple Page Example Upload	Confidential:	No
File Name(s):	Pages from 6.6_MatrixCare_Clinical.pdf	Source:	Upload
Received Date/Time:	04/02/2013 02:58 PM	From/Fax Number:	
Document Category(s):	Clinical	Pages Unassigned/Total:	11 / 12
Comments:	<input type="text"/>		

**Attach Resident Document**

Display only Active Residents

**Resident:**

- Select Residents -----
- apple, rose (1501782)
- bell, Joe (1501959)
- Bird, Antonio (1501743)
- Black, Jacob (1501944)
- Blow, Joseph (1502011)
- Blue, Bird (1502148)
- Booth, Seeley (1502018)
- Brennan, Temperance (1502020)
- brewer, peter (1502076)

----- Selected Residents -----  
Jones, Linus (1502066)

[Select All](#)  
Double-click or use the arrow buttons to select choices  
Hold down 'Ctrl' key to select multiple choices

**Title:** March 2013 Therapy Log

**Type:** Therapy and Restorative Documents

Document From Date:

Document To Date:

Comments:

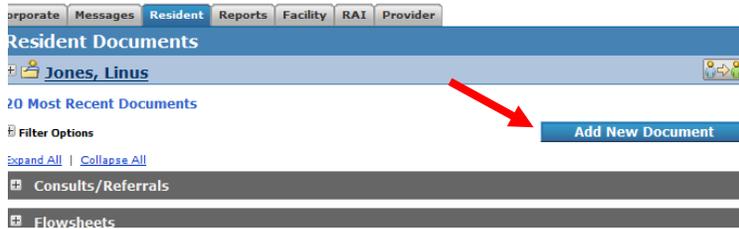
Trusted sites | Pro

**Uploading**

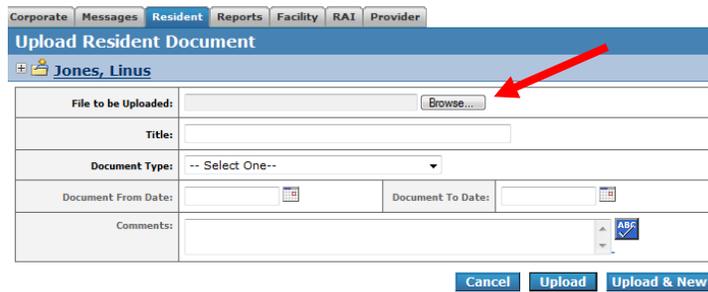
## Documents to a Specific Resident

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

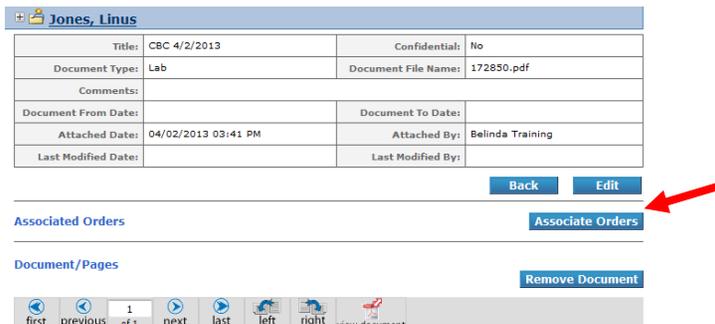


You will be able to browse to find the document then add the Title and Type and click on Upload or Upload and New to add another one.



### 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.



# Ohio Living MatrixCareCareCare System Resident Documents - Nursing

**Jones, Linus**

Orders - Current Orders & Orders DC'd Within 30 Days Of The Document Received Date

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

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

Corporate Messages **Resident** Reports Facility RAI Provider

**View Lab Order**

**Jones, Linus** [\\* View Associated Resident Documents](#)

Allergies: [Aspirin](#); [Keflex](#); [Oxycodone](#); [PCN](#); [Cats](#);

**Order Information**

Received Date: 04/02/2013 Received By: Belinda R Jones RN

Corporate Messages **Resident** Reports Facility RAI Provider

**Associated Resident Documents**

**Jones, Linus**

Type:	Lab		
Start Date:	04/02/2013	End Date:	04/02/2013
Description:	CBC No DIFF		

**Documents Attached To Order:**

Test	From Date To Date	Attached Date	Document Type	Title	Comments
CBC No DIFF		04/02/2013	Lab	<a href="#">CBC 4/2/2013</a>	

## 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.

# Ohio Living MatrixCareCareCare System Resident Documents - Nursing

Corporate Messages Resident Reports Facility RAI Provider

**Resident Document**

Jones, Linus

Title:	February 2013 MAR	Confidential:	No
Document Type:	Flowsheets	Document File Name:	109442.pdf
Comments:			
Document From Date:		Document To Date:	
Attached Date:	03/29/2013 05:09 PM	Attached By:	Belinda Jones
Last Modified Date:		Last Modified By:	

Back Edit

---

Associated Orders Associate Orders

---

Document/Pages Remove Document

Navigation: first previous 1 of 1 next last left right view document

1 / 1 102%

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

Corporate Messages Resident Reports Facility RAI Provider

**Remove Resident Document**

Jones, Linus

Title:	February 2013 MAR	Confidential:	No
Document Type:	Flowsheets	Document File Name:	February 2013 MAR
Comments:			
Document From Date:		Document To Date:	
Attached Date:	03/29/2013 05:09 PM	Attached By:	Belinda Jones
Last Modified Date:		Last Modified By:	
Remove Reason:	--Select One-- --Select One-- Wrong Resident Incorrect Data Obsolete Other		
Reason Note:			

Cancel Save

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

Last Modified Date:		Last Modified By:	
---------------------	--	-------------------	--

Back Edit

---

Associated Orders Associate Orders

---

Document/Pages Remove Current Page Remove Document

Navigation: first previous 1 of 3 next last left right view document

1 / 1 84.3%

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

# Ohio Living MatrixCareCareCare System Resident Documents - Nursing

**Removed Resident Document**

**Jones, Linus**

Title:	February 2013 MAR	Confidential:	No
Document Type:	Flowsheets	Document File Name:	109442.pdf
Comments:			
Document From Date:		Document To Date:	
Attached Date:	03/29/2013 05:09 PM	Attached By:	Belinda Jones
Last Modified Date:		Last Modified By:	
Removed Date:	04/02/2013 03:53 PM	Removed By:	Belinda Training
Removed Reason:	Wrong Resident		
Reason Note:			

[Back](#) [Edit](#)

**Associated Orders**

**Document/Pages** [Reattach Document](#)

To view removed documents, you need to select Include Removed in the Filter Option when searching.

**Filter Options** [Add New Document](#)

Document From Date:	<input type="text"/>	Document To Date:	<input type="text"/>
Attached From:	<input type="text"/>	Attached To:	<input type="text"/>
Title:	<input type="text"/>	PDF Only:	<input type="checkbox"/>

Search Document Type:

- Accounts Receivable
- Assessments
- Discharge Documents
- Hospital Paperwork
- Medicare Certs. and Recerts.
- Radiology
- Admission Agreements and Addendums
- Authorizations/Consents
- Flowsheets
- Insurance Cards/Verifications
- Orders
- Therapy and Restorative Documents
- Advance Directives
- Consults/Referrals
- History & Physical
- Lab
- Progress Notes

[Check all](#) | [Clear all](#)

Include Removed Documents:  [Search](#)

[Expand All](#) | [Collapse All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input type="checkbox"/>			04/02/2013	<a href="#">March 2013 Therapy Log</a>	<input checked="" type="checkbox"/>	REMOVED: Wrong Resident	<a href="#">View</a>

[Check All](#) | [Clear All](#) [Report](#) [Download](#)

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.

Search Document Type:

- Discharge Documents
- Hospital Paperwork
- Medicare Certs. and Recerts.
- Radiology
- Flowsheets
- Insurance Cards/Verifications
- Orders
- Therapy and Restorative Documents
- History & Physical
- Lab
- Progress Notes

Include Removed Documents:  [Search](#)

[Expand All](#) | [Collapse All](#)

	From Date	To Date	Attached Date	Title	PDF	Comments	View
<input type="checkbox"/>			03/29/2013	<a href="#">February 2013 MAR</a>	<input checked="" type="checkbox"/>	REMOVED: Wrong Resident	<a href="#">View</a>

[Check All](#) | [Clear All](#)

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Resident Documents - Nursing

**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

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Resident Documents - Nursing

- 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

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- 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.

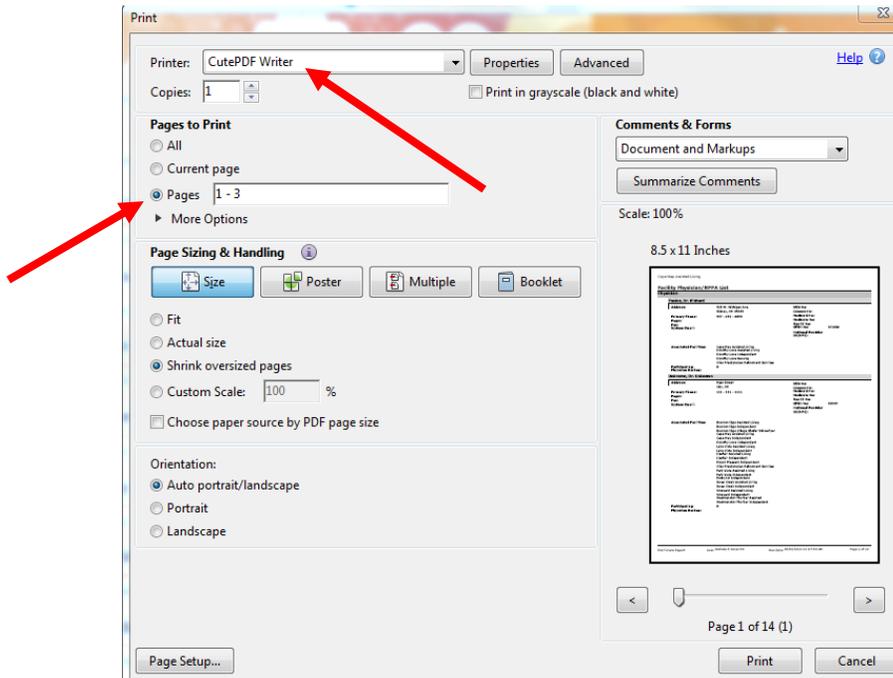
**Rehab/Restorative Documents (previously "Rehab", contains all Rehab documents attached prior to 4/4/13)**

- 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

**Ohio Living  
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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