

# Directions for Uploading Documents into a Facility's EMR system

To upload into a facility's EMR system, you need to have remote access so you can access it from your GNT computer.

## Directions to Upload Documents into Point Click Care

1. In GNT, create a PDF of your document. You can do this quickly by highlighting the record from your ALL list (don't open the note), then click the control key and B at the same time. This creates a pdf of the record and places it on your clipboard to be pasted into PCC.
2. Log into PCC. You will need access to the Misc (previously named the Documents) tab. If you do not see this tab, you can request access from the facility network administrator (the person who gave you PCC access). Click on the Misc tab.

The screenshot shows the PointClickCare interface for a patient named Gatie Jackson. The patient's status is Current, located at 5 506-A, with a gender of Female and a date of birth of 5/7/1925. The physician is Victor Nwlich. The patient has an allergy to Hydrocodone and a code status of DNR. The interface includes a navigation menu with tabs for Dash, Profile, Census, Med Diag, Allergy, Immun, Orders, Wts/Vitals, Results, MDS, Assmnts, Prog Note, Care Plan, Ta, k, s, and Misc. The Misc tab is circled in red. Below the navigation menu is a 'New Document' button and a table of documents. The table has columns for Effective Date, Document Name, Category, Upload Date, and Uploaded By. The table contains 18 rows of document records.

	Effective Date	Document Name	Category	Upload Date	Uploaded By
edit del	4/15/2019	Deer Oaks psychological progress note.pdf	Clinical Document	4/16/2019	CJackson
edit del	3/20/2019	NEUROLOGICAL ASSESSMENT.pdf	Clinical Document	3/31/2019	AJackson1
edit del	2/1/2019	medication review report 02/2019.pdf	Clinical Document	3/30/2019	AJackson1
edit del	3/1/2019	medication review report 03/2019.pdf	Clinical Document	3/30/2019	AJackson1
edit del	12/5/2018	communication form.pdf	Clinical Document	3/17/2019	KNelson
edit del	3/1/2019	PM & R consult.pdf	Other	3/10/2019	KNelson
edit del	12/1/2018	MEDICATION REVIEW 12/01/2018-12/31/2018.pdf	Other	2/28/2019	LHart
edit del	1/29/2019	PROGRESS NOTES.pdf	Other	2/24/2019	KNelson
edit del	2/15/2019	PROGRESS NOTES.pdf	Other	2/24/2019	KNelson
edit del	11/27/2018	medication review report.pdf	Other	2/9/2019	KNelson
edit del	1/15/2019	medication review report.pdf	Other	2/3/2019	KNelson
edit del	12/18/2018	wound eval.pdf	Other	1/27/2019	KNelson
edit del	12/18/2018	wound eval.pdf	Other	1/27/2019	KNelson
edit del	12/11/2018	wound eval.pdf	Other	1/27/2019	KNelson
edit del	1/23/2019	lab report.pdf	Other	1/27/2019	KNelson
edit del	12/2/2018	lab report.pdf	Other	1/26/2019	KNelson

3. Select the New Document option. This opens the Upload New Document window. Click into the File Name text bar and paste the pdf into the bar by clicking control and V at the same time. Then select open.

The screenshot shows the PointClickCare interface with a file explorer window open. The file explorer is displaying the contents of the Desktop folder. The file name text bar at the bottom of the file explorer is circled in red. The file explorer shows a list of folders and files, including 'Office 2013 Pro Plus' and 'Behavioral Rounds Report'. The file name text bar is empty, and the 'Open' button is visible.

4. You will then need to update the date and enter the name of the service and category. I use "Deer Oaks Progress Note" as the name of the service.

The screenshot displays the PointClickCare web application interface. At the top, the browser address bar shows the URL: <https://www12.pointclickcare.com/upload/filesdisplay.xhtml?ESOLrow=1&ESOLclientid=291176&ESOLtabType=C&ESOLtabType=C>. The application header includes the PointClickCare logo, user information (Matlock Place- SNF, Catie Jackson), and a Sign Off button. The main navigation bar contains Home, Clinical, and Reports. The patient information section shows a patient with Status: Current, Location: 5 506-A, Gender: Female, DOB: 5/7/1925, Age: 9, and Physician: Victor Nwloh. Allergies are listed as Hydrocodone, and Code Status is DNR. A 'New Document' button is circled in red in the left-hand menu. The 'Upload New Document' modal window is open, showing the following fields: Effective Date (4/16/2019), Name (empty), Category (Other), and File (empty). The modal also includes 'Upload' and 'Cancel' buttons. In the background, a table of document uploads is visible, with columns for Effective Date, Document Name, Upload Date, and Uploaded By.

Effective Date	Document Name	Upload Date	Uploaded By
4/15/2019	Deer Oaks psych	4/16/2019	CJackson
3/20/2019	NEUROLOGICAL	3/31/2019	AJackson1
2/1/2019	medication review	3/30/2019	AJackson1
3/1/2019	medication review	3/30/2019	AJackson1
12/5/2018	communication fo	3/17/2019	KNelson
3/1/2019	PM & R consult	3/10/2019	KNelson
12/1/2018	MEDICATION RE	2/28/2019	LHart
1/29/2019	PROGRESS NOTES	2/24/2019	KNelson
2/15/2019	PROGRESS NOTES.pdf	2/24/2019	KNelson
11/27/2018	medication review report.pdf	2/9/2019	KNelson
1/15/2019	medication review report.pdf	2/3/2019	KNelson
12/18/2018	wound eval.pdf	1/27/2019	KNelson
12/18/2018	wound eval.pdf	1/27/2019	KNelson
12/11/2018	wound eval.pdf	1/27/2019	KNelson
1/23/2019	lab report.pdf	1/27/2019	KNelson
12/2/2018	lab report.pdf	1/26/2019	KNelson

# Directions to Upload Documents into MyUnity (Cantex homes)

1. Create a PDF of your document. You can do this quickly by highlighting the record from your ALL list (don't open the note), then click the control key and B at the same time. This creates a pdf of the record and places it on your clipboard to be pasted into Unity.
2. Log into Unity. If you do have this access, request access from the facility network administrator.
3. Select the patient using Find a Patient
4. Next, click the Clinical button in the top left, and then click Providers

The screenshot shows the MyUnity interface for a patient. The top navigation bar includes 'Home', 'Census', and 'Clinical' (circled in red). The patient's name is 'Carlyle/E4 Williamsburg/Carl/200 Georgetown'. The 'Providers' button in the top navigation bar is also circled in red. Below the navigation bar, there are tabs for 'Alerts', 'Patient Info', 'Care Management', 'Admission', 'Vitals', 'Care Plan', 'Assessments', 'MDS', 'Therapy', 'Orders', 'Tests', 'Wounds', 'Notes', and 'Providers'. The 'Providers' tab is selected. Below the tabs, there is an 'Attachments' section with a 'Show' dropdown set to 'Details' and a 'Group By' dropdown. The table below shows 'No data to display'.

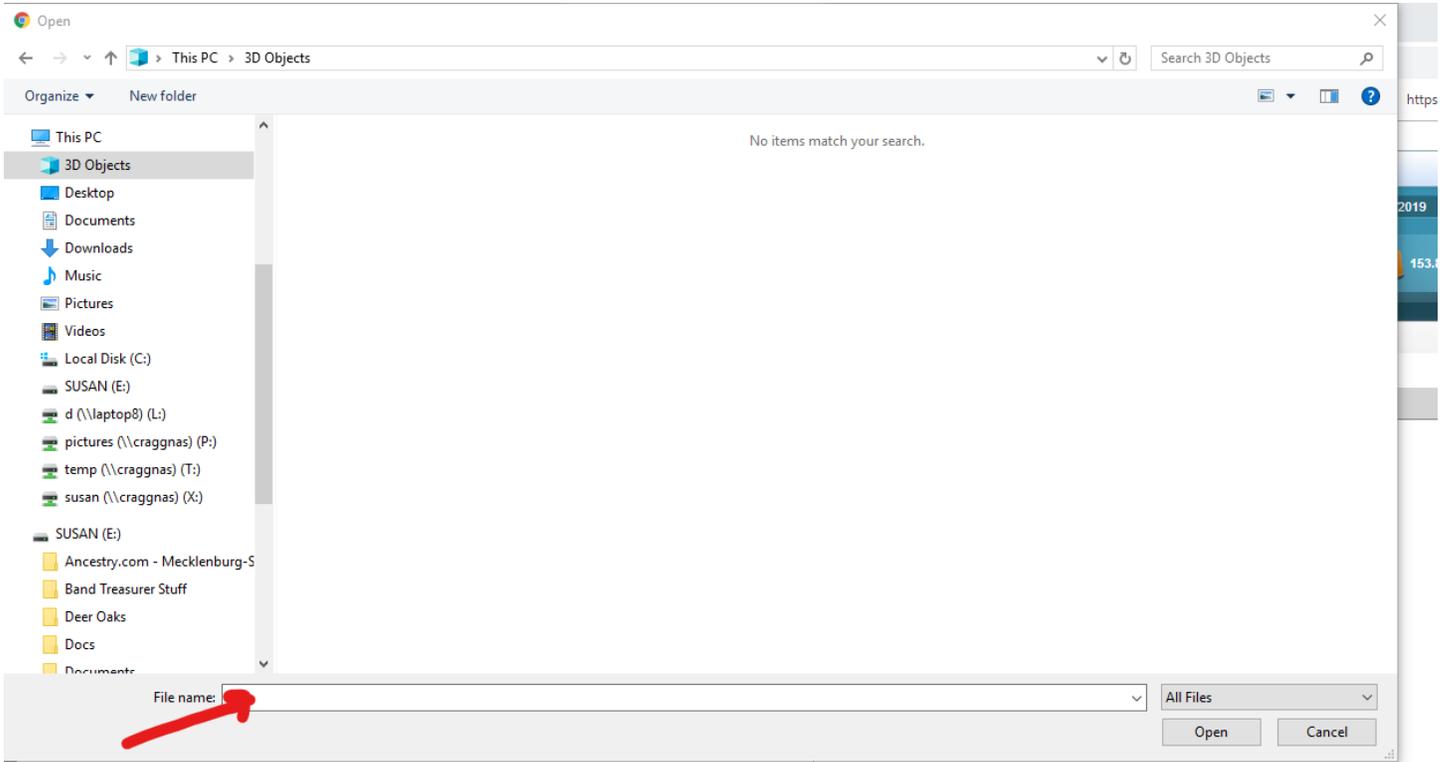
5. Scroll down to Add Attachment

The screenshot shows the 'Add Attachment' section of the MyUnity interface. It includes three tables: 'Provider Consults', 'Provider Notes', and 'Provider Discharge Notes'. Each table has columns for 'Form', 'Reason', 'Author', 'Date', 'Status', and 'Created'. Below these tables is the 'Attachments' section. The 'Add Attachment' button is circled in red. The 'Attachments' table has columns for 'Category', 'Sub-Category', and 'Label'. The table shows two rows: 'Progress Note' under 'Deer Oaks' and 'Progress Note' under 'Deer Oaks'.

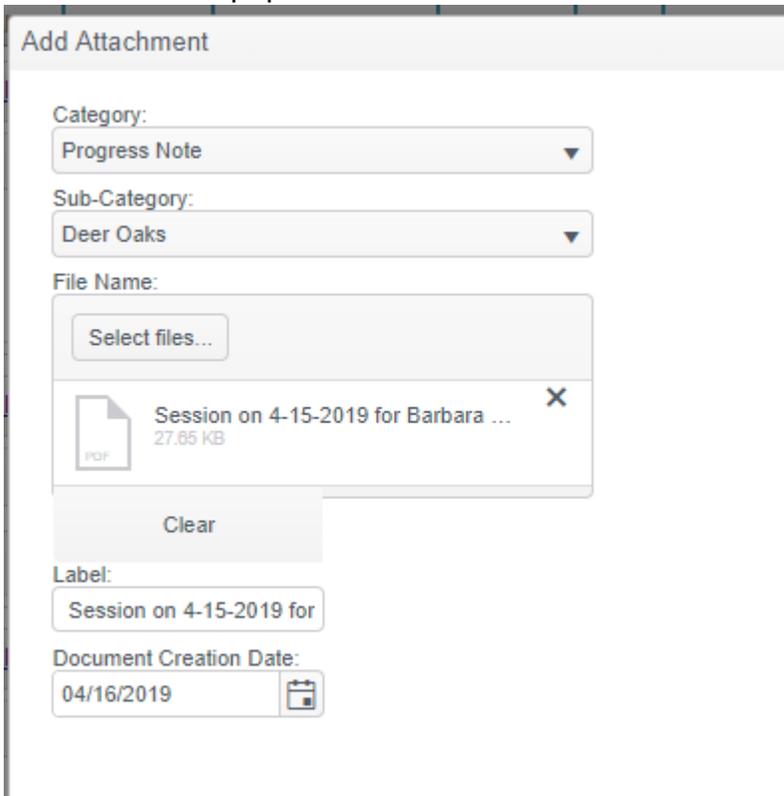
6. Use the drop down menus on the left to select 'Progress Note' under Category and 'Deer Oaks' under Sub Category. Then click Select Files.

The screenshot shows the 'Add Attachment' dialog box. It has the following fields: 'Category:' with a dropdown menu set to 'Progress Note'; 'Sub-Category:' with a dropdown menu set to 'Deer Oaks'; 'File Name:' with a 'Select files...' button; 'Label:' with an empty text box; and 'Document Creation Date:' with a date picker set to '04/16/2019'.

- Put your cursor in the file name line and on your keyboard, click Control V to paste your note and then click Open.



- This will populate on screen and will auto fill the Label. Click OK and your attachment is added.



When you click control B, GNT assumes you are doing this because you are uploading to an EMR. As such, it will mark the EMR upload date with the current date. You may also wish to mark it as printed. If so go to Tools, Settings, and select the option that says “Mark documents as printed when PDFed”.