

# Document Manager

myUnity User Guide



**Netsmart**

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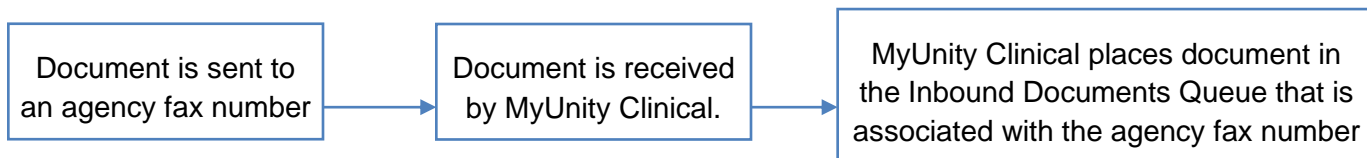
## Summary

Document Manager allows an agency to manage all inbound and outbound document traffic through MyUnity Clinical. This is done via:

- Inbound Fax, which routes all inbound documentation into MyUnity Clinical;
- Outbound Fax, which sends out documents via digital e-fax services;
- Bar Code Identification, which automatically attaches inbound documents to the electronic records that they originated from; and
- Document Queues, which allow all inbound documents to be processed completely through MyUnity Clinical.

# Inbound Fax

All documents sent to the fax number(s) associated with an agency's account will come directly into MyUnity Clinical, eliminating the need to upload documents received via a fax machine or email fax system.



Multiple fax numbers can be associated with one MyUnity Clinical site. An agency using multiple fax numbers for different departments or locations can still process all inbound document traffic through MyUnity Clinical.

## Inbound Fax Setup Options

### 1. PORTING

**Summary:** Your agency's current fax service provider may be able to relinquish your current fax number. This is known as porting. myUnity can then input your number directly into your Inbound Fax/Document Manager setup information. All documents sent to your fax number will come into myUnity automatically.

**Prerequisite:** Your agency must provide myUnity with certain information in order to port your number from your current fax service provider. Please note that the process to port your fax number may take 2-3 weeks to complete.

### 2. FAX FORWARDING

**Summary:** All documents sent to your existing fax number are automatically forwarded to a number that myUnity will give to you. Therefore, those documents will come into myUnity automatically.

**Prerequisite:** Your agency must set up fax forwarding from your current fax number to a number that myUnity will provide you. This can typically be done over the phone or online with your fax service provider.

### 3. NEW FAX NUMBER

**Summary:** If your provider does not have options for fax forwarding or porting, then your agency can transition to a new inbound-only fax number, which myUnity will provide you with. All documents sent to the fax number that myUnity gives to you will come into myUnity automatically.

**Prerequisite:** None

## Inbound Fax Setup Steps

To get a better understanding of which of these options may work best for your agency, please review the setup steps for each option below:

# Porting

**Step 1:** Confirm with your fax service provider that porting your fax number from them is a viable option.

**Step 2:** Communicate with your Consultant or Implementation Project Manager to inform them that you would like to port your current fax number, and provide myUnity with the following information:

- Number to Port\*\*
- Authorizing Person (MUST be a myUnity Approved Requestor)
- Exact Name/Address (used for billing on the account with your current fax provider)
- Account # (The account number with the current carrier for the number you wish to port)
- Billing Phone # (The contact phone number the current carrier has on file for your account)
- Current Carrier
- Is this fax line used for the client's internet service or credit card reader?

**\*\*Please note:** if you are porting a Toll Free number, Updox requires some additional information. Please complete this Toll Free Letter of Authorization:

<https://myunitytrainingportal.netsmartcloud.com/wp-content/uploads/Blank-Toll-Free-LOA.pdf>

In addition, myUnity will need two other items:

- A copy of the most recent bill for service on that line
- A completed copy of this Letter of Authorization (LOA):  
<https://trainingportal.devero.com/wp-content/uploads/myUnity-LOA.pdf>

After the porting process is completed, the carrier who previously provided you service on that number will no longer charge you for that line.

After the porting process is completed, any devices (ie, internet service or credit card reader) in the office that share service on that fax number will no longer work. You can check with your current service provider to determine if that will be an issue in your case. Porting typically takes approximately 2-3 weeks to complete.

After the porting process is completed, the fax machine in the office that was previously used to send and receive faxes on that line will no longer work to receive or send faxes.

**Step 3:** Document Manager will be enabled on your site on your Document Manager go-live date. myUnity will inform you when the porting process is complete. At that point, Inbound Fax

functionality will take effect, and all faxes sent to your agency's fax number(s) will come directly into myUnity automatically.

## Fax Forwarding

**Step 1:** Confirm with your fax service provider that fax forwarding from your current fax number to another fax number is a viable option.

**Step 2:** Communicate with your Consultant or Implementation Project Manager to inform them that you would like to auto-forward your inbound documents into myUnity. myUnity will respond with a fax number.

**Step 3:** Ask your fax service provider to auto-forward from your current fax number to the fax number that myUnity gives to you. Fax forwarding should begin ON or AFTER your Document Manager go-live date, which will be provided to you.

**Step 4:** After Inbound Fax/Document Manager is enabled on your site, and fax forwarding is set up with your fax service provider, all documents that are sent to your agency's fax number(s) will come into myUnity automatically.

## New Fax Number

**Step 1:** Communicate with your Consultant or Implementation Project Manager to inform them that you would like to transition to a new inbound-only fax number. myUnity will respond with your new fax number.

**Step 2:** All faxes sent to your new fax number will come directly into myUnity automatically as soon as Inbound Fax/Document Manager is enabled on your site.

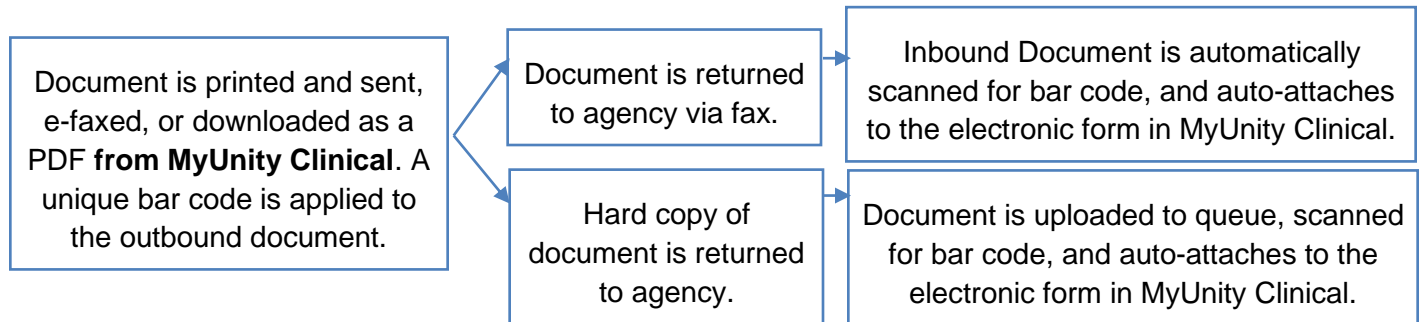
**Please Note:** The fax number that myUnity provides will be an inbound-only fax number for Document Manager.

## Bar Code Identification

Bar Code Identification eliminates the need to manually attach inbound documents to the proper electronic records if the documents originated in MyUnity Clinical. All outbound (printed, e-faxed, or downloaded) documents will be given a bar code. This bar code will be unique on each document. The bar code will fit neatly into the form header.

PHYSICIAN ORDERS			
Patient: TEST, 25SKP-Patient 2490		Caregiver: 002SKRN1, 002SKRN1 (Nurse) Order Date: 07/26/2016	
Chart: 1 Episode: 1			
PHYSICIAN:	NPI#	PHONE #:	FAX #:
ADDRESS:	CITY:	STATE:	ZIP:
PATIENT NAME : TEST , 25SKP	PHONE #:	STATE:	ZIP:
ADDRESS:	CITY:	STATE:	ZIP:
SOCIAL SECURITY #:	BIRTHDATE:	GENDER: <input type="radio"/> M <input type="radio"/> F	RACE:
CONTACT PERSON/RELATIONSHIP:	PHONE #:		
<b>DIAGNOSIS:</b>			
Test Data			

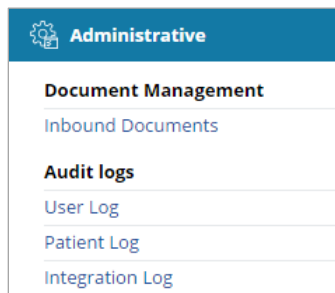
All inbound documentation (faxed or uploaded to a queue) will be scanned for a barcode. Any document with a unique barcode will be identified and automatically attached to the electronic MyUnity Clinical form that it originated from.



## Document Queues

Document Queues allow users to fully process inbound documents directly in MyUnity Clinical.

All inbound documents will come into a Document Queue in the **Inbound Documents** page.



All documents sent to one fax number will appear in the corresponding queue (1 fax number = 1 queue).

However, multiple supplementary queues can be created to categorize inbound documents later on (i.e. Intake Queue, Physician Order Queue, HR Queue, etc.).

Home > Inbound Documents Archive

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**Centralized Fax Number (408-555-5555)**  
 All faxes from number 4085555555 route here  
 Received Today: 0 Total: 0

---

**HR Department (855-712-5050)**  
 HR Documents are faxed here  
 Received Today: 3 Total: 10

---

**Intake Department**  
 Intake Documents will be moved here  
 Received Today: 0 Total: 11

---

**Physician Order Management**  
 All documents related to Orders route here  
 Received Today: 1 Total: 12

Each queue will display:

- Queue Name
- Fax number associated with the queue (if any)
- Description of the queue
- Received Today: Total number of documents received today
- Total: Total number of documents currently in the queue

Access to each queue can be customized to allow only the appropriate users to manage it. Permission to access each queue can be determined by user type (i.e. all Super Admin users) or individual user (i.e. Office Admin Mary, Super Admin Susan, and Office Admin John).

## Accessing Document Queues

The Inbound Documents link will appear on both office and field staff user menus. However, only users that have been given permission to inbound document queues will see the queues that they have been given permission to view.

Users that do not have access to any document queues will see the following if they select the Inbound Documents link:

No matching records found

---

Showing 0 to 0 of 0 results

## Document Manager

All inbound documents will come into the document queue associated with the fax number the document was sent to. Documents can then be fully processed from within the document queue:

- If needed, move the document into the appropriate queue for processing
- Manually attach any inbound documents that were not auto-attached to an electronic record
- Archive documents after they have been fully processed to move them out of the workflow

Home > Inbound Faxes > TestUPDOXFaxQ

Select an Action ▼

<input type="checkbox"/>	Document Name	Date Received	Patient Name	MR #	Form	Form Date	Marks
<input type="checkbox"/>	<a href="#">fax-46433_1_1469204815485.pdf</a>	07/22/2016 09:56 PM IST					
<input type="checkbox"/>	<a href="#">fax-46433_2_1469204819371.pdf</a>	07/22/2016 09:56 PM IST	SFE785, DBE43	5B3	Patient Profile	05/07/2013	
<input type="checkbox"/>	<a href="#">fax-46433_3_1469204822067.pdf</a>	07/22/2016 09:57 PM IST	S65BB, EE56D	9366F959	OASIS Nurse Recert	05/07/2013	
<input type="checkbox"/>	<a href="#">fax-46433_4_1469204824792.pdf</a>	07/22/2016 09:57 PM IST	<a href="#">A8D157, 75B2C1D</a>	010003618	<a href="#">Plan of Care</a>	05/07/2013	
<input type="checkbox"/>	<a href="#">fax-46433_5_1469204827484.pdf</a>	07/22/2016 09:57 PM IST	<a href="#">A8EF9, 3E2713</a>	10012425	<a href="#">Physician Orders</a>	05/07/2013	
<input type="checkbox"/>	<a href="#">fax-46433_6_1469204830276.pdf</a>	07/22/2016 09:57 PM IST	SFE785, DBE43	5B3	OASIS Diagnosis Code Addendum	05/07/2013	
<input type="checkbox"/>	<a href="#">fax-46433_7_1469204832767.pdf</a>	07/22/2016 09:57 PM IST	<a href="#">AC08A, EM4E</a>	10011462	<a href="#">Barium Study</a>	05/07/2013	

Showing 1 to 100 of 151 results

Navigation: [Previous] [1] [2] [Next]

Document Name and Date Received will display for every inbound record.

- **Document Name:** a link to open the PDF version of the inbound document
- **Date Received:** the original date the inbound document came into the system

Patient Name, MR#, Form, Form Date, and any marks will **only** display if the inbound document was auto-attached by Bar Code Identification, or manually attached to an electronic form in MyUnity Clinical.

## Actions

Check the box to the left of an inbound document, and open the **(Select an Action)** dropdown to perform any of the following actions:

**Move to Queue:** Move the document to another document queue for processing

**Move to Archive:** Archive the inbound document after it has been processed

**Print:** Open the Printer-Friendly Version of the inbound document

**Mark As:** Apply a mark (i.e. "Order Returned" or "QA") to the electronic record the inbound document is attached to.

- An inbound document must be attached to an electronic record in order to apply a mark from a queue.

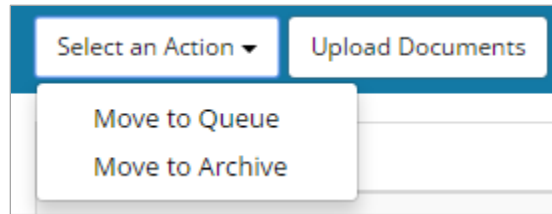


- If a user does not have access to the patient that an inbound document is attached to, then the user cannot take any action on the inbound document.

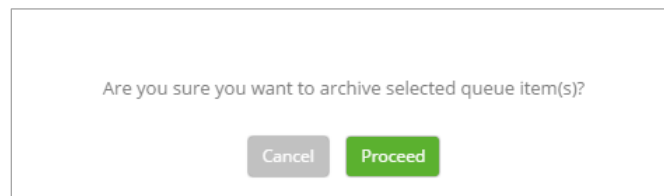
## Move to Archive

After they have been processed through a document queue, inbound documents can be archived to move them out of the workflow.

**Step 1:** Move an inbound document to the archive using the **Select an Action** dropdown at the top of a document queue.



**Step 2:** Confirm by selecting **Proceed** in the popup that appears. Select **Cancel** to keep the document in the current queue.



## Archive

The archive will store all documents that have been archived from any queue. The archive displays all of the same data that is displayed in the document queues except marks.

Home > Inbound Faxes > Archive

**Filters**

**From** 07/19/2016 **To** 07/25/2016

**Archived From**  
9 Queues

[Go](#)

Restore ?

<input type="checkbox"/>	Document Name	Date Received	Patient Name	MR #	Form	Form Date	Archived From
<input type="checkbox"/>	fax-46140_1_1469066395173.pdf	07/21/2016 07:29 AM IST					madhutest300
<input type="checkbox"/>	fax-46140_2_1469066397879.pdf	07/21/2016 07:29 AM IST	ANG, FRANKIE	98980098	Plan of Care		madhutest300
<input type="checkbox"/>	fax-46140_3_1469066400609.pdf	07/21/2016 07:30 AM IST	ANG, FRANKIE	98980098	Plan of Care		madhutest300
<input type="checkbox"/>	fax-44464_1_1469147459434.pdf	07/22/2016 06:00 AM IST					Update-MultiSelect
<input type="checkbox"/>	fax-44464_1_1469148445135.pdf	07/22/2016 06:17 AM IST					Update-MultiSelect
<input type="checkbox"/>	fax-46419_1_1469202185116.pdf	07/22/2016 09:13 PM IST	Fond, Charlie		Plan of Care		TestUPDOXFaxQ
<input type="checkbox"/>	fax-	07/22/2016 09:20	testbarcodepatient,		Medication Profile		TestUPDOXFaxQ

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**Restore:** Restore an archived document back to the queue that it was originally archived from. An archived document must be restored before any actions (i.e. attachment to an electronic form) can occur.

**Archived From:** The queue that the document was moved to the archive from.

## Filters

**From/To Dates:** Based on the date that the document was received

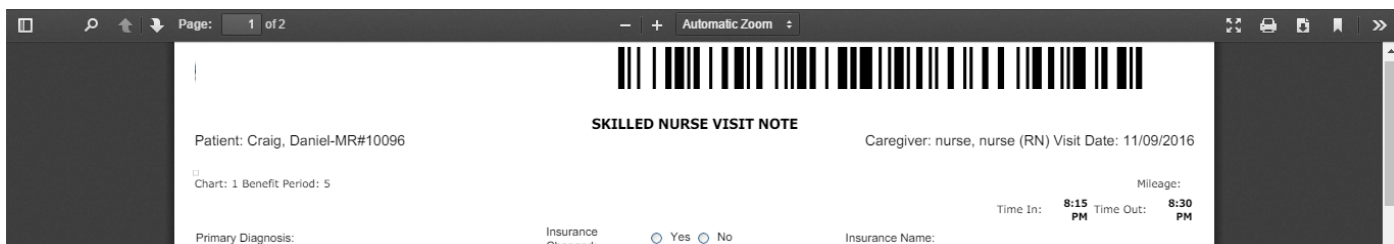
**Archived From:** Search for documents that were moved to the archive from a specific queue.

Users will only be permitted to access documents that have been archived from the document queues that they have permission to view.

## Printing Forms

To ensure optimal resolution and clarity, agencies using Bar Code Identification with Document Manager should print forms using the print icon in the Printer Friendly Version of forms.

This will help to prevent bar code degradation, and allow Bar Code Identification to read and attach inbound documents to the electronic forms they originated from.



Page: 1 of 2

Automatic Zoom

Patient: Craig, Daniel-MR#10096

Chart: 1 Benefit Period: 5

Primary Diagnosis:

Insurance Channel:  Yes  No

Insurance Name:

Caregiver: nurse, nurse (RN) Visit Date: 11/09/2016

Mileage:

Time In: 8:15 PM Time Out: 8:30 PM

Selecting the print icon to print documents from MyUnity Clinical will result in clearer, higher resolution than selecting the print option from your internet browser or CTRL+P on your keyboard.