


# SWIM – Access to Care

## Upload and Scan Documents

### Quick Reference Guide

Add documents to a case on the waitlist. Learn to edit, assign document types, view documents, and deactivate documents.

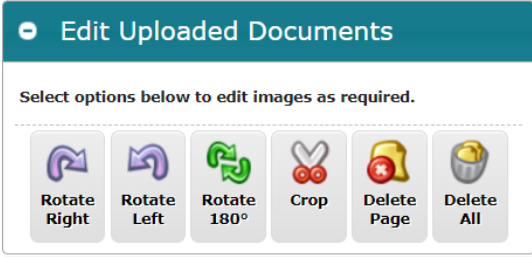


Add documents	
1. Open the Attach Document window	<ul style="list-style-type: none"> <li>On the <b>Case Details</b> screen, click the <b>paperclip/plus</b> sign in the patient header or click the <b>Attachments</b> hyperlink</li> </ul> 
2. Select Method	<ul style="list-style-type: none"> <li><b>Method 1 – Upload</b> from a file on the computer. This method is available for Microsoft Windows or Apple Macintosh computers</li> <li><b>Method 2 – Scan</b> directly to SWIM ATC (scanner must be TWAIN compliant with the TWAIN driver installed. This method is only available for Microsoft Windows computers)</li> </ul>

Method 1 - Upload	Method 1 - Upload	Method 2 - Scan
1. Select method	<ul style="list-style-type: none"> <li>In the <b>Attach Documents</b> window, click <b>Upload</b> radio button</li> <li>Select the <b>PDF Rasterizer</b></li> </ul>	<ul style="list-style-type: none"> <li>In the <b>Attach Documents</b> window, click <b>Scanner</b> radio button; ensure your scanner is selected</li> <li>Select the scanning <b>Colour</b></li> <li><i>Grey typically has the fewest compatibility issues, but depending on the document you are scanning</i></li> </ul>
2. Attach Document	<ul style="list-style-type: none"> <li>Click <b>Browse</b></li> <li>Navigate to the computer's files to find the desired document</li> <li>Click <b>Open</b></li> </ul> <div style="border: 2px solid green; padding: 5px; margin-top: 10px;">  <b>Only PDF, BMP, JPEG, JPG, PNG, and GIF files can be uploaded</b> </div>	<ul style="list-style-type: none"> <li>Place the documents in the scanner</li> <li>Click <b>Scan</b>.</li> </ul>
3. Edit (if necessary)	<ul style="list-style-type: none"> <li>If necessary, edit the document by expanding the <b>Edit Uploaded Documents</b> area. Several options are available</li> </ul>	


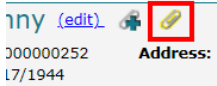

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Method 1 - Upload	Method 1 - Upload	Method 2 - Scan
		
4. Assign Document Type	<ul style="list-style-type: none"> <li>Expand the <b>Assign Document Types</b> area and choose a document type from the drop-down</li> </ul> <div style="border: 1px solid green; padding: 5px; margin-top: 10px;">  <b>If unsure what document type to use, consider “Other Documents”</b> </div>	
5. Add a note	<ul style="list-style-type: none"> <li>If applicable, a note can be added to the document. Click the <b>post-it</b> note icon to add a note and click <b>Update</b>.</li> <li>Click <b>Save</b></li> </ul>	

### View, Edit, and Deactivate Documents

1. Find the documents	<ul style="list-style-type: none"> <li>From the <b>View List</b>, click on the paperclip icon to view documents</li> <li>On the <b>Case Details</b> screen, click the paperclip icon</li> </ul>	 
2. Select action	<ul style="list-style-type: none"> <li>On the <b>Attached Documents</b> page, click on the desired <b>Action; Print/View, Edit or Deactivate</b></li> </ul> <p><b>Deactivating</b> a document should be used if the document is outdated or if the document was uploaded to the wrong patient. Documents can be reactivated if done in error.</p> <div style="border: 1px solid green; padding: 10px; margin-top: 10px;">  <b>If a document was attached to the wrong patient, submit a Service Desk ticket including only the Novari ID number (no other patient identifiers) to have the document removed completely.</b> </div>	