sycle PRO

eDocs User Guide

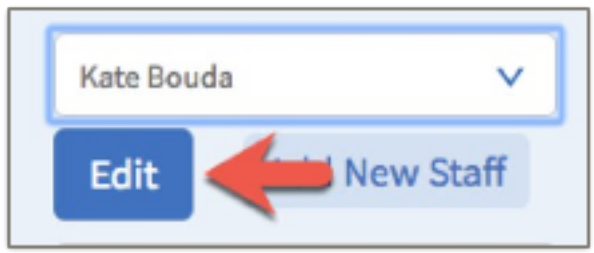
EDOCS

With many areas of the healthcare industry going digital, Sycle offers a paperless office solution called **eDocs** that enables you to manage and share patient documents through our HIPAA compliant cloud computing system.

With **eDocs**, you can scan patient photos and all documents for each patient into the patient summary. This eliminates the need for paper charts and files, as **eDocs** is HIPAA compliant.

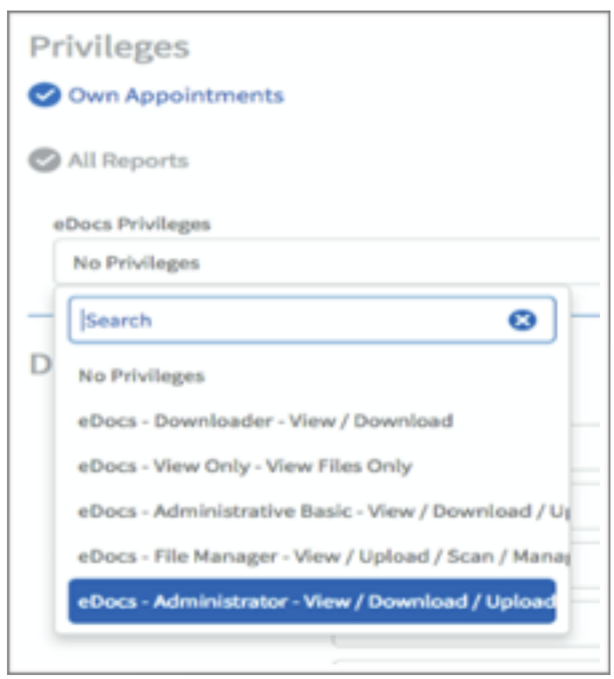
SETTING UP EDOCS

The first step in utilizing **eDocs** is setup in **Administration**. When logged in to your account, click on the **down arrow** next to **Appointments** and click on **Administration**.



First, access needs to be granted to all employees in the account utilizing **eDocs**. In the area labeled **Select a Staff Member**, choose one and click **Edit**.

Scroll down to **Privileges**, **eDocs Privileges**, and choose the access you would like your employee to have.

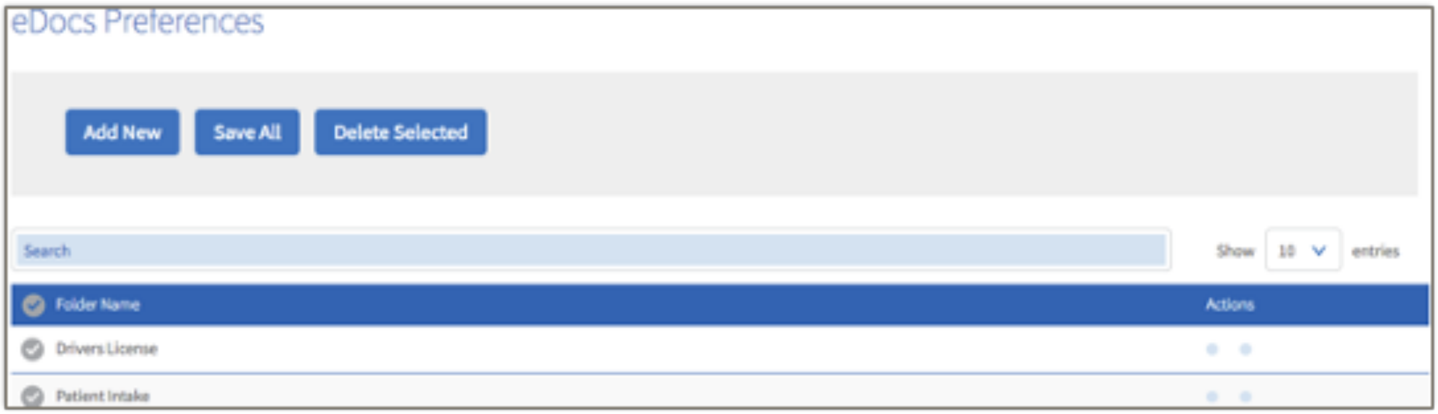


CREATING FOLDERS

Once privileges are setup for all users, it is time to create the folders. The folders that are created in **Administration** are the folder names that will appear in each patient summary under **eDocs**.

Under **Administration**, find **eDocs** and click on **eDocs Preferences**.

From here click on **Add New** and add as many folders as you would like.



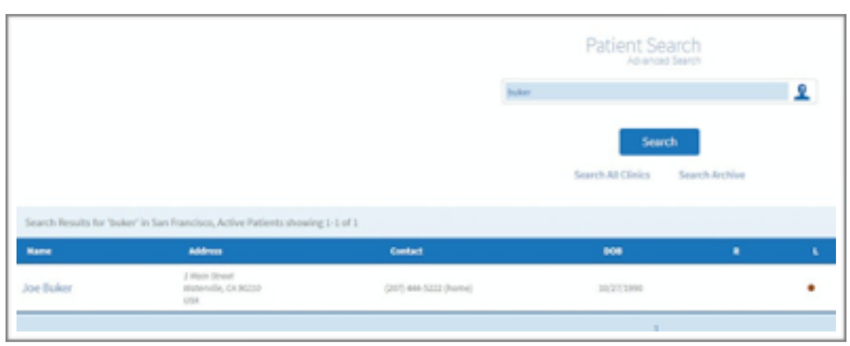
If any folders are edited, renamed, or deleted, you will still find those folders listed under previous patients. Changes to folders will only be reflected on new patients.

SCANNING

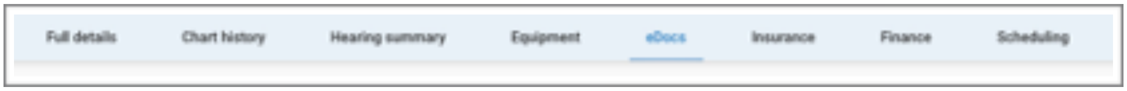
Once your **Administration** is set up it is time to start scanning. First, ensure that your scanner is twain compliant.

Then find a patient that you want to scan a document for. Search their **Name** in the **search box**.

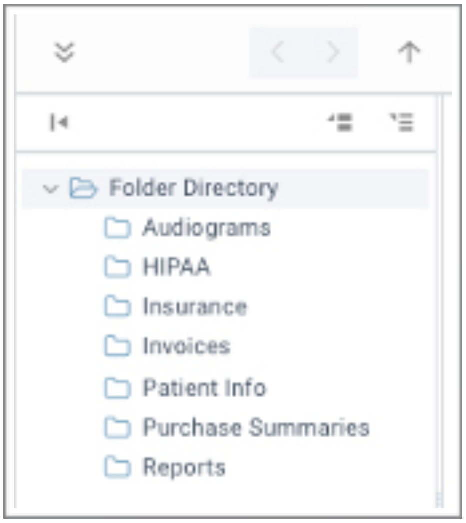
Click on the **search box** to get into their patient summary.



Open the **eDocs** section by clicking on **eDocs**.

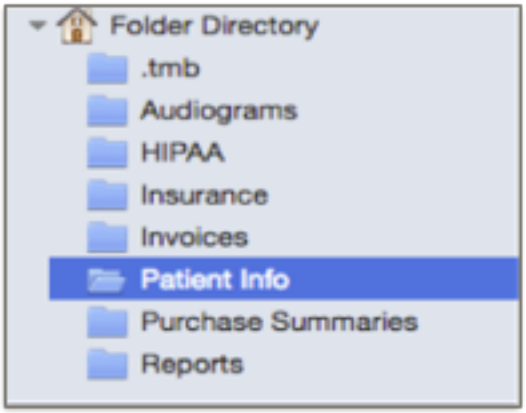


Once the section is open, you will see all folders that were created in the **Administration** section.

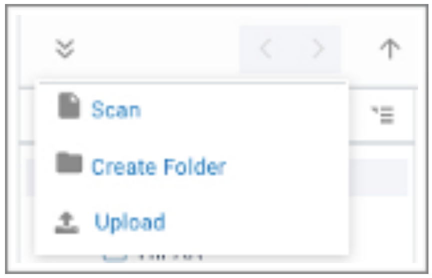


SCAN FROM SCANNER

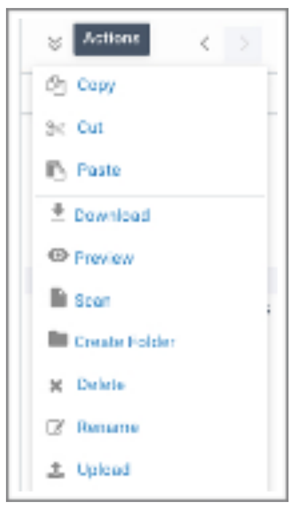
To scan a document straight from your scanner, click on the folder you want to scan the file(s) to. For this example, we will use patient info.



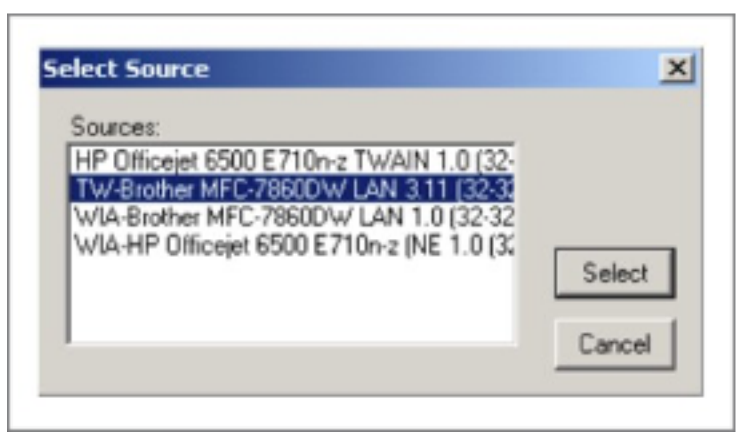
Place the files(s) into your scanner and click on the **Action** arrows and click scan.



Also within the Action arrows you will be able to manage all aspects of the files stored within the patients eDocs.



The next menu that displays will prompt you to select a scanner. Choose the scanner you would like to use and click **Select**.

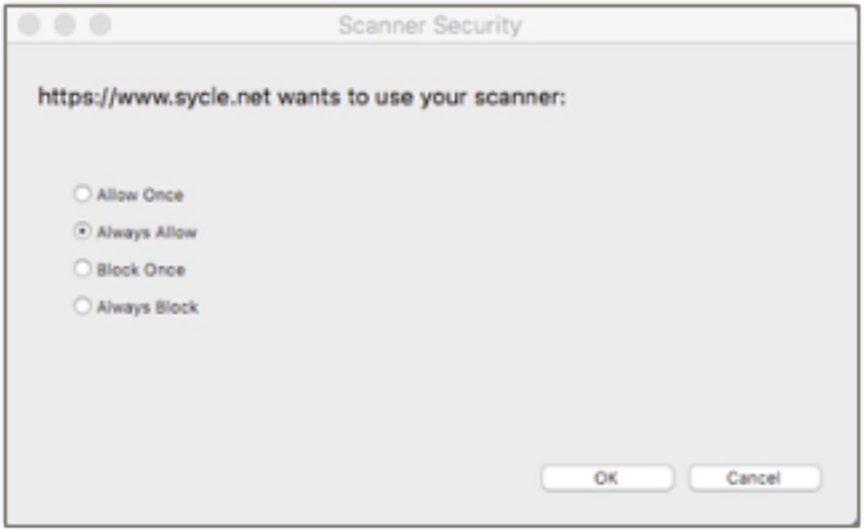


A new window will display, specific to the scanner you have chosen. Recommended scan settings are 300 DPI for letter size scans. The lower the DPI, the more space you will save. This will also reduce upload times. Try using 150 DPI and increase as necessary. Black and white will upload faster than color.

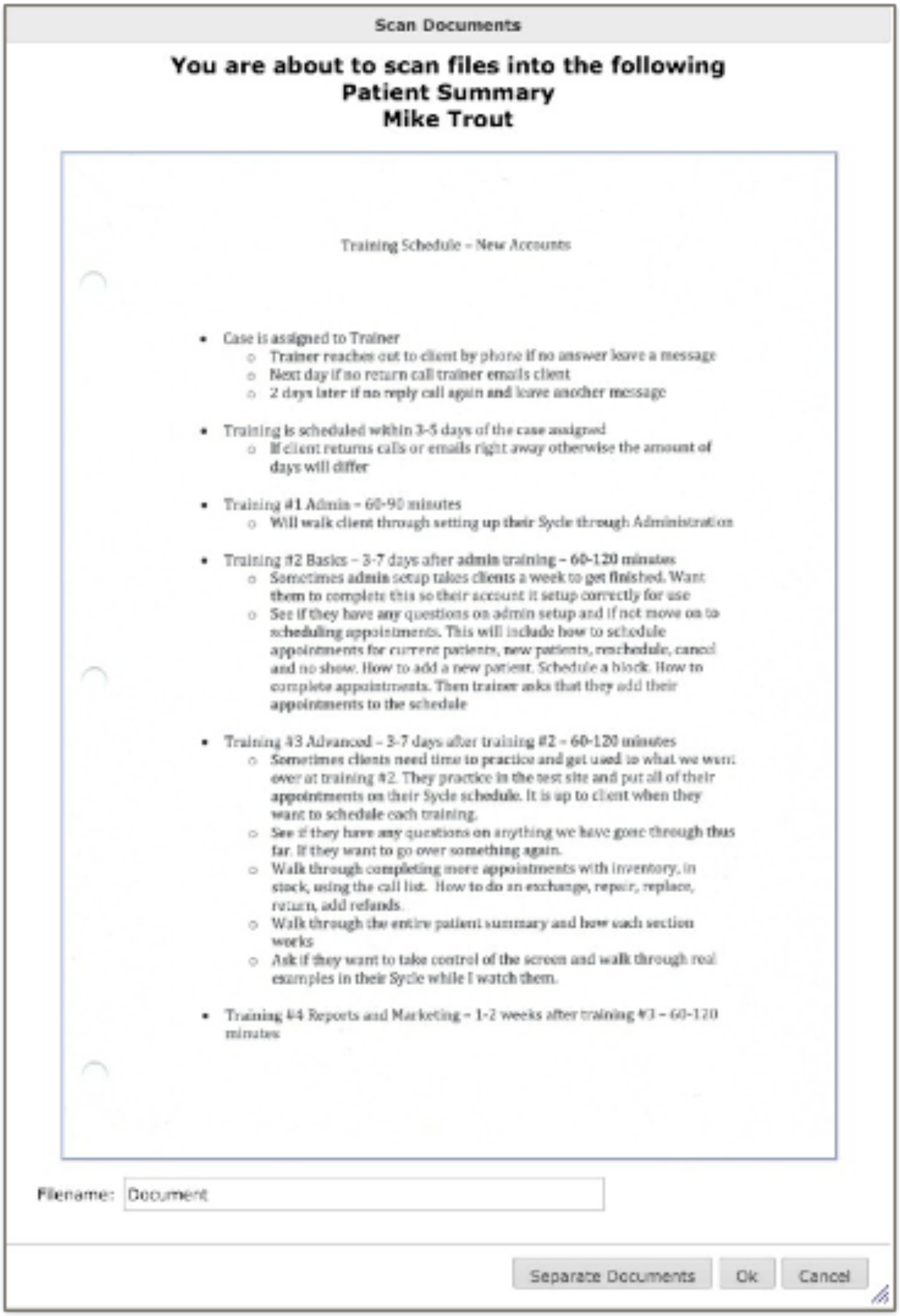
Refer to the sources below for more information:

- Guidelines for Digitizing Archival Materials for Electronic Access
  https://www.archives.gov/preservation/technical/guidelines.html
- Guidelines for Digitizing Archival Materials for Electronic Access (PDF)
  https://www.archives.gov/files/preservation/technical/guidelines.pdf

A Scanner Security window will open. Select your option and click **OK**.



A window will display on your desktop containing the documents you just scanned. Click on the document title below the document icon to rename your file and click **OK**.


Scan Documents

You are about to scan files into the following
Patient Summary
Mike Trout

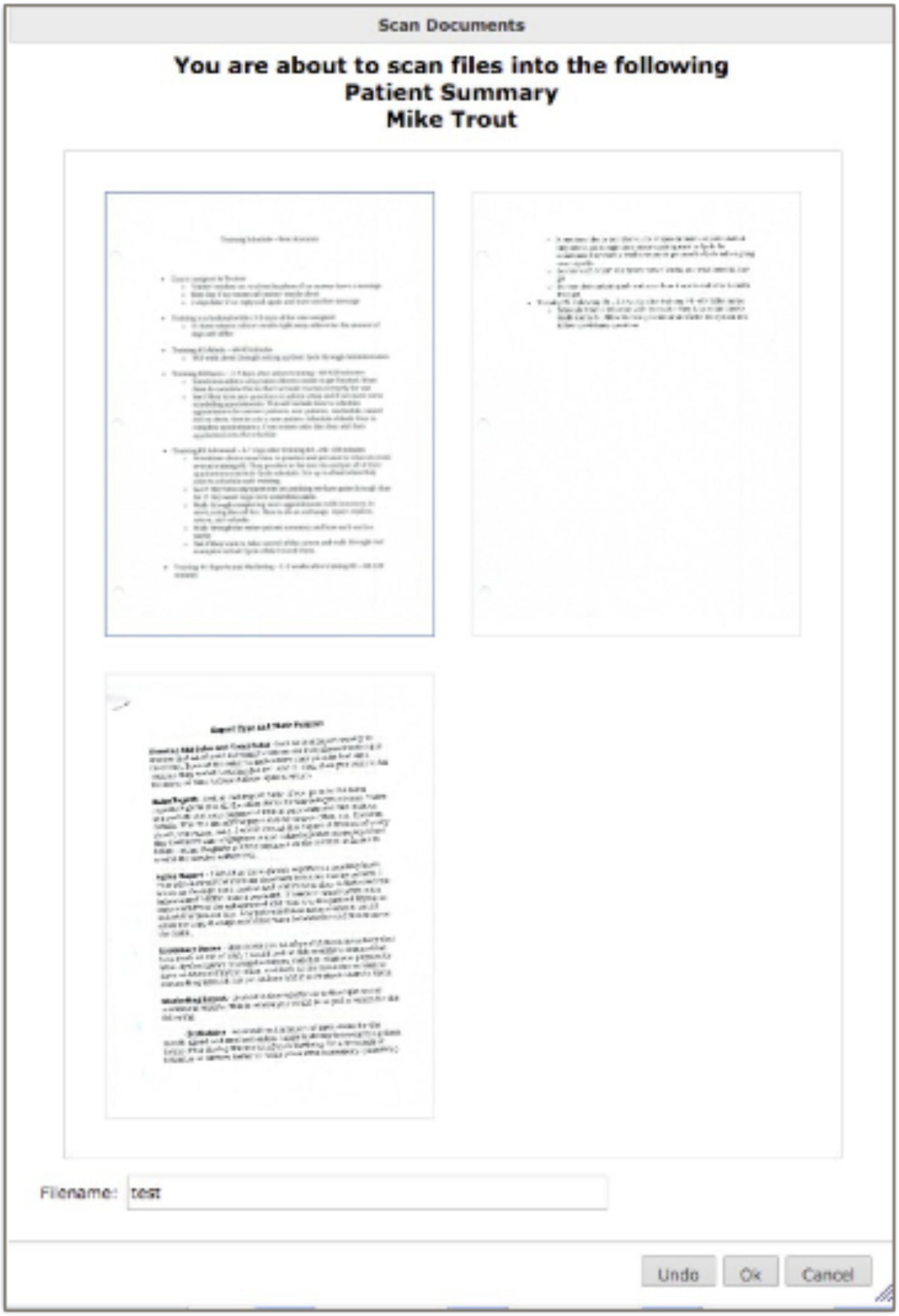
Training Schedule – New Accounts

- Case is assigned to Trainer
  - Trainer reaches out to client by phone if no answer leave a message
  - Next day if no return call trainer emails client
  - 2 days later if no reply call again and leave another message
- Training is scheduled within 3-5 days of the case assigned
  - If client returns calls or emails right away otherwise the amount of days will differ
- Training #1 Admin – 60-90 minutes
  - Will walk client through setting up their Sycle through Administration
- Training #2 Basics – 3-7 days after admin training – 60-120 minutes
  - Sometimes admin setup takes clients a week to get finished. Want them to complete this so their account it setup correctly for use
  - See if they have any questions on admin setup and if not move on to scheduling appointments. This will include how to schedule appointments for current patients, new patients, reschedule, cancel and no show. How to add a new patient. Schedule a block. How to complete appointments. Then trainer asks that they add their appointments to the schedule
- Training #3 Advanced – 3-7 days after training #2 – 60-120 minutes
  - Sometimes clients need time to practice and get used to what we went over at training #2. They practice in the test site and put all of their appointments on their Sycle schedule. It is up to client when they want to schedule each training.
  - See if they have any questions on anything we have gone through thus far. If they want to go over something again.
  - Walk through completing more appointments with inventory, in stock, using the call list. How to do an exchange, repair, replace, return, add refunds.
  - Walk through the entire patient summary and how each section works
  - Ask if they want to take control of the screen and walk through real examples in their Sycle while I watch them.
- Training #4 Reports and Marketing – 1-2 weeks after training #3 – 60-120 minutes

Filename: Document

Separate Documents | Ok | Cancel

If you would like to name the scanned documents individually, click on the **Separate Documents** button. Click on the title of each document and rename individually and click **OK**.



After scanning you can search for any document within a patient summary documents section. Enter the search term in the **search bar** and click **Enter**.

eDocs also allows you to upload photos of your patients. Simply click on the **+** to the left of you patient name on the Patient Summary.

This will prompt your computer to pull up your files, asking you to select the picture you want to apply. Search the pictures; find the one you want, select it, and click **Open**. The picture will be added to the patient summary.

Once the picture has been uploaded when you hover over you will be able to click on the **trash can** to delete or the **eye** to enlarge the picture on your screen.