

Cycle Document Upload Feature of Client Database (CDB)

Introduction

The purpose of the Cycle Document Upload feature is to attach clinical documents in PDF format to the CDB record of a specific cycle for a client. Minimally, clinical documents **must** include procedure and pathology reports and pre-/post- visit office visit progress notes, if applicable. The Cycle Document Upload is a **required** feature in the CDB.

The Cycle Document Upload feature allows local program CDB users to:

1. Store a copy of the provider or lab reports in the CDB instead of manually typing reports verbatim into certain fields in the CDB (e.g., 'Comments on Findings' or 'Pathology Report' sections of the CRC module).
2. Make clinical reports and other information available to DHMH for review as needed/requested.
3. Link a specific document to a client's cycle using the Cycle Document Upload page (see Instructions below)

Instructions

Scanning and Saving

1. Scan the document you wish to upload **in PDF format**.
Note: You will need to know what type of scanning device you have, as scanners may automatically save documents in PDF or JPG format; Only documents saved **in PDF format** may be uploaded to the CDB
2. Save the file to a **secure/confidential** location on your computer **using the following naming convention for the file name:**
CDB ID-cycle number description/type of report date of report

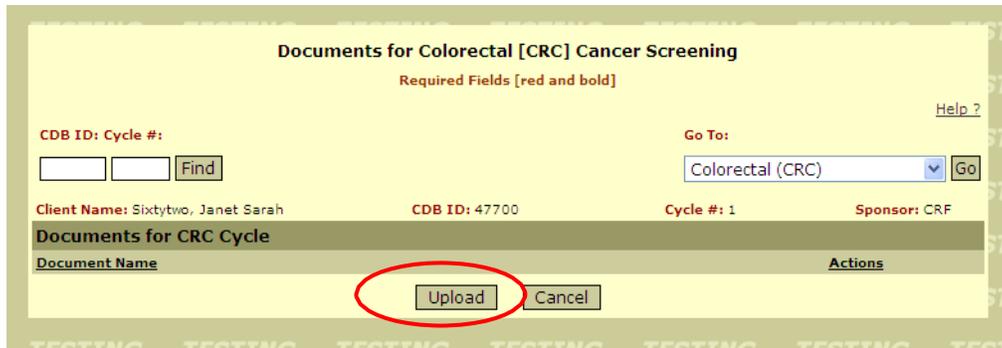
Example: 47022-2 path report 04-29-2013.pdf

Uploading Cycle Documents

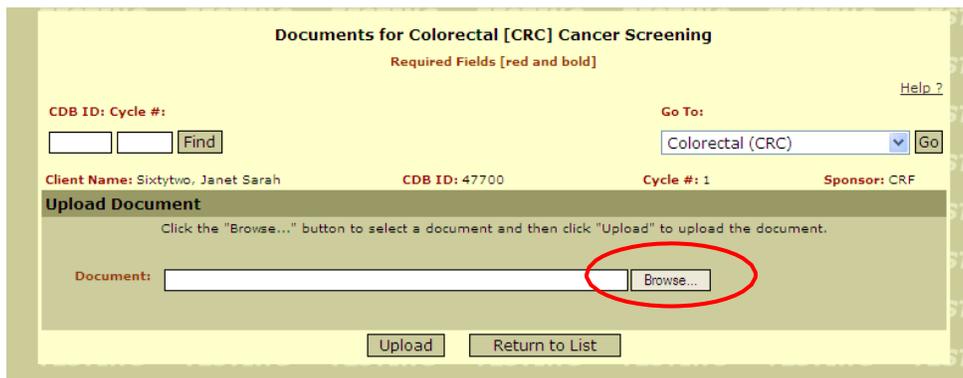
1. From the 'Go To' menu at the top of each page in each cycle in the CDB, select **Cycle Documents** (see screen shot below) and click on the 'Go' button.
This will take you to the Cycle Documents page in CDB.

The screenshot shows the 'Colorectal Cancer [CRC] Screening Page 1' interface. At the top, there is a 'Go To:' dropdown menu with a list of options: 'Colorectal (CRC)', '-Screening Pg 1', '-Screening Pg 2', '-Screening Pg 3', '-Screening Pg 4', '-Post Screening Pg 1', '-Post Screening Pg 2', '-Cycle Closure', '-Nurses Notes', '-Additional Procedures', '-Program Defined Variables', '-Required Fields Validation', '-Cycle Documents', '-Letter/Merge File', '-Cycle Report', and '-Core Page 1'. The 'Cycle Documents' option is highlighted in blue. The 'Go To:' button is circled in red. Below the menu, there are fields for 'CDB ID: Cycle #:', 'Client Name: Sixtytwo, Janet Sarah', 'CDB ID: 47700', 'Jurisdiction: Baltimore City-UMMS', 'Client Identification', 'Cycle Start [Interview] Date [mm/dd/yyyy]: 08/15/2011', and 'Patient Information'.

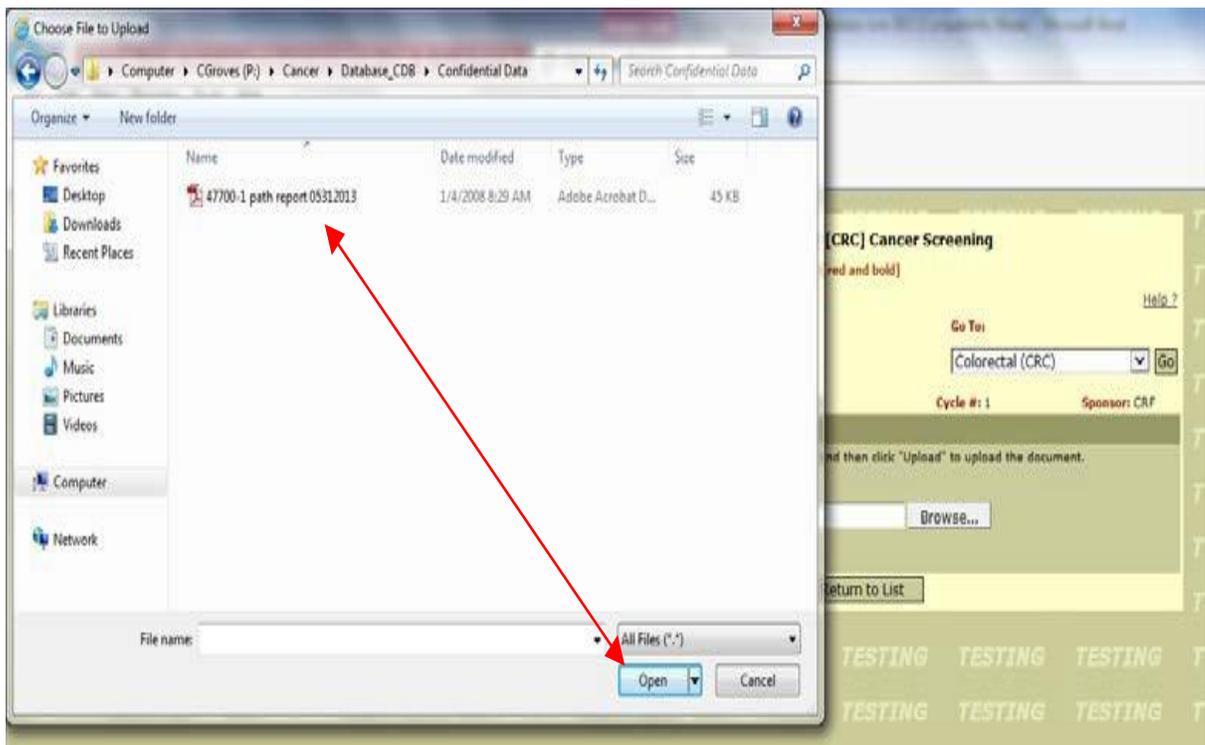
- From the Documents screen, click **Upload**. This opens a new screen.



- Click on **Browse** to select the Document. This will bring up a new window with a file directory.



- Locate the .pdf file; double-click or click Open (this is similar to attaching a file in an email).



- Once the PDF document is identified in the 'Browse' window, click on **Upload**.

- A message appears if successful: File Uploaded Successfully. Click **Upload** to add more documents, or click **Return to List** to see entry. Or use the 'Go To:' box to return to other sections of the client record.

Viewing Documents

From the 'Go To' menu in the cycle, select the **Cycle Documents** option. This will open the Documents page for you to view the documents uploaded to this cycle. The 'Cancel' button takes you back to the Client Information Page. To stay within the cycle, use the 'Go To' box.

Changing File Names

To change a file name once it is uploaded, you will need to go to the source document that you saved on your computer and change the name, delete the uploaded document, and upload the document with the new name. You may not rename the file you have already uploaded to the CDB directly in the CDB.

Retaining Files

The scanned document, once uploaded, will be saved in the CDB at the cycle level. After scanning a document, you may wish to delete the electronic version saved to your computer and retain only the original hard copy in the client's record to minimize the number of confidential files on your computer or server. Alternatively, you may wish to retain only the electronic version if your local program has moved to electronic records. Your local program should make the decision as to which document(s) to keep in your files and under what security protections.