Letters from Word to PowerChart (DocLoader)

Loading Word Documents to PowerChart

A number of Microsoft Word templates have been created to enable department and clinic letters to be loaded to PowerChart. All templates now require the authentication of your username and password before loading up these documents to PowerChart. This Quickstart explains the process:

Creating a new 'DocLoader' document

As there are a number of different templates, access to the template is via a Word macro. This allows you to click on an icon (such as this 😊) which will automatically open the correct template for your department.

- Once the template has opened, you will notice a special green DocLoader toolbar.

  This toolbar allows you to save the <u>final</u> document to PowerChart.

Rules for using the Template

- Use the **TAB** key to move from one field to the next within the protected area of the template.

- The date that the letter is typed is automatically entered and this cannot be changed.

- When you want to print a document, use the copy saved to your local directory as this will print with the correct formatting (e.g. first page will print on letterhead). Documents printed from PowerChart are for internal use and not for mailing purposes.

Tip:	Always save your file to your department drive before sending the document to PowerChart

Template fields

- *Document title* – select option from the drop-down-list
- *Initials of clinician* – enter the doctors initials (2 character field only)
- *Typist initials* - automatically updated
- *Visit date* - enter the date the child was seen
- *Clinic Code* – automatically updated
- *Date of letter* – automatically updated
- *Title* – enter the recipients title
- *Recipient First Name* – the first name of the recipient of the letter
- *Recipients Surname* – the first name of the recipient of the letter
- *Recipients Address* – 2 lines of address are available. If more space is required, just press Enter.
- *Salutation* - enter a greeting
- *Patient's First Name* – enter the first name of the patient as it appears in PowerChart/Patient Management
- *Patients Surname* – enter the surname of the patient as it appears in PowerChart/Patient Management
- *DOB* – enter the patient's date of birth as it appears in PowerChart/Patient Management
- *Sex* – enter the patient's sex
- *MRN* – enter the CHW medical record number
- *Patient's Address* – enter all of the patients address in this field [if more lines are required just press enter]
- *Letter Number ("-")* – used for version control. Change the dash to a 1, 2, 3, etc. to allow multiple letters for the same date to display in the patient's record.

Warning!	Special formatting characters and symbols **may not** be accepted by PowerChart. It is recommended that you **do not** use bullets, tables, µ (micro), accented words (café) or any non-standard characters, such as inserted symbols.

Inserting signatures

The template allows you to use standard Word functions such as *autotext* within the unprotected areas of the document. To insert saved autotext:

- From the *Insert* menu, select *Autotext* and choose the appropriate item.

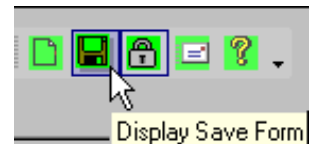## Managing multiple letters for the same clinic date

It is not uncommon for multiple letters to be typed for a patient for the same clinic date. The template provides an easy way for such documents to be typed, and will then enable each letter to be viewed within PowerChart.

- Type the first letter for the patient as per usual. Save the letter to a local directory when completed.
- Open the completed first letter, and select *Save As* from the *File* menu. Enter an appropriate, unique file name.
- Modify the new document as required. In the *LetterNum* field (usually located after the address field; by default this is a dash "-") change this to a 1. This can be repeated in subsequent documents, by incrementing this number (2, 3, 4, etc.)
- When completed, send each document to PowerChart.

Sending the completed document to PowerChart

Once the document has been reviewed and it is ready to be sent to PowerChart:

- Click on the *Display Save Form* button on the DocLetterLoader toolbar. The following form will display:

The Username of the person logged onto the computer will display by default.

- Enter your password in the *Password* field. This password is your email and Novell password.

- Click on the *Authenticate* button. If the password is correct, the *click here to save (and close) all copies ticked above* button will be enabled. Click on this button to send the document to PowerChart.

Before any documents are loaded to PowerChart, the system compares the **first name**, **surname**, **date of birth**, **sex** and **MRN** entered in the letter for the patient against that stored on PowerChart. Letters will only load to PowerChart where all of these details match. If there are any problems with the letter an email will be sent to your department contact, asking for the document to be amended and resent.

Information:	Once saved to PowerChart, the document will display in PowerChart on the **Results** and the **Clinical Documents** tabs, within approximately one hour.