*This process is step by step instructions to complete a sort and transfer of an existing medical chart provided by USB stick into the Community EMR chart.*

Sort the Files on your Desktop

1. Insert the USB/Disk on your computer
2. Create a temporary folder on your desktop
3. Open the USB/Disk folder contents
4. Identify what items from the client's record are to be imported to the EMR.
5. Right click and select copy for each of the items and paste into the temporary folder created on the desktop.
6. Once copying is complete safely remove the USB/Disc to ensure you are using the correct folder for EMR transfer.

Via the Virtual Chart Document Import

1. From the client's Virtual Chart select the ⊕.

2. Select the ⊕ symbol within the Documents to Upload

3. Navigate to the appropriate file within your folder. All images should be saved to your desktop drive in order to access them via Citrix for posting on the EMR. To navigate to this drive complete the following from within the EMR image import;

   1. select the (R:) drive
   2. Select the *User*s Folder
   3. Select your name folder
   4. Within this folder should be your files folder
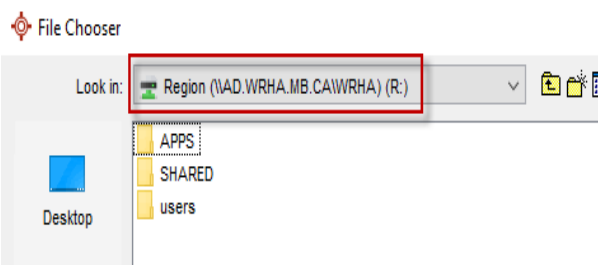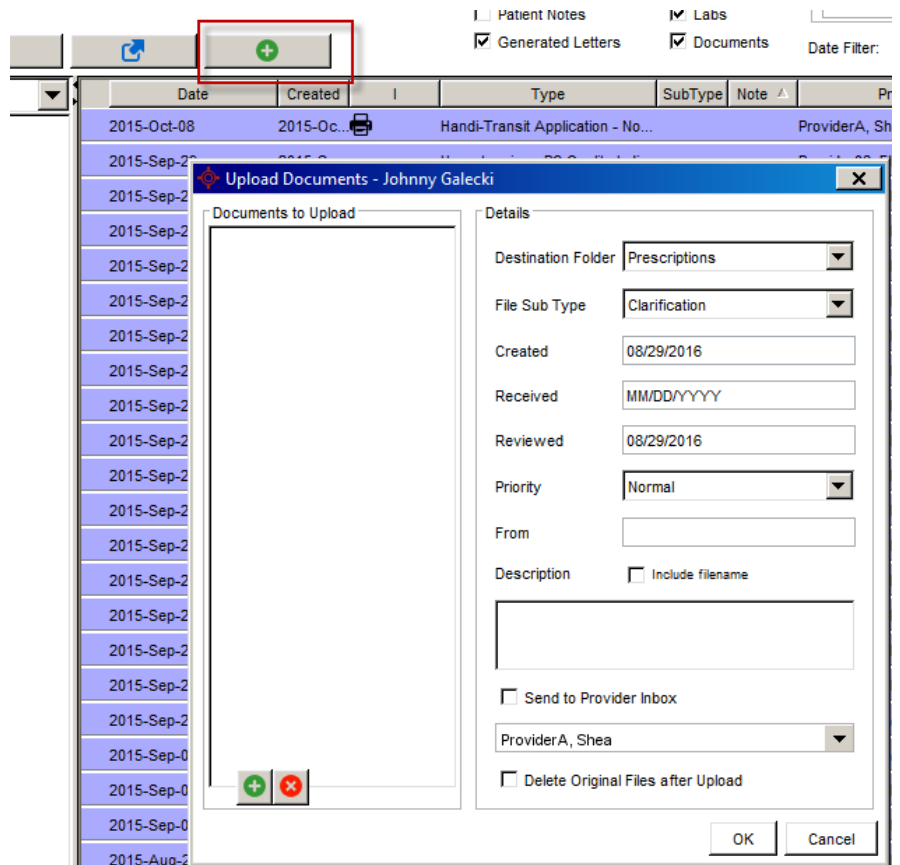
4. Double click to open the folder containing the individual files

5. **Select** the first file to be uploaded.

6. Set the Destination Folder and subfolder

7. Add the Created, received and reviewed dates

8. Identify the Provider that will review the document.

📄 **Note:** If several documents will be using the <u>same</u> Destination Folder, Sub Type and dates repeat step 5 again until all files are listed in the *Document to Uploaded.*
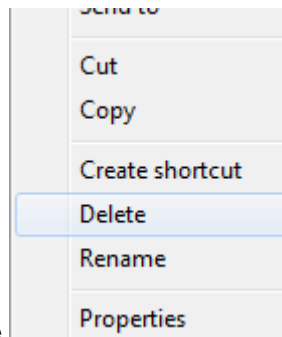
9. Select **OK** to upload all documents.

10. Verify that the documents appear in the client's Virtual Chart.

Remove the Temp Folder from your Local Desktop

Following the file uploads to EMR. All files must be deleted from the local desktop
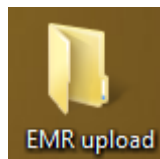
11. Locate the folder on your Desktop

12. Right Click select Delete

13. Within the Delete Prompt respond *Yes*

14. All items should be removed from your desktop.