

Unassigned Scanned Documents



Course Overview

External records may need to be added to a patient's chart to maintain complete documentation and support continuity of care. The External Document screen allows users to upload outside records directly to a patient's chart.

This guide explains how to upload an external record using the CorrecTek Electronic Health Record (EHR) system in non-hosted environments where CorrecTek is installed and managed on the organization's internal infrastructure.

Use This Guide When

- An outside document must be added to a patient chart
- A scanned document must be assigned to a patient
- Running the Unassigned Scanned Documents workflow
- External medical information needs to be included in the chart

What You'll Be Able to Do

- Run the Unassigned Scanned Documents workflow
- Open the External Document screen
- Import a scanned document
- Save the document to the patient record
- Confirm the document appears in the chart

Unassigned Scanned Documents



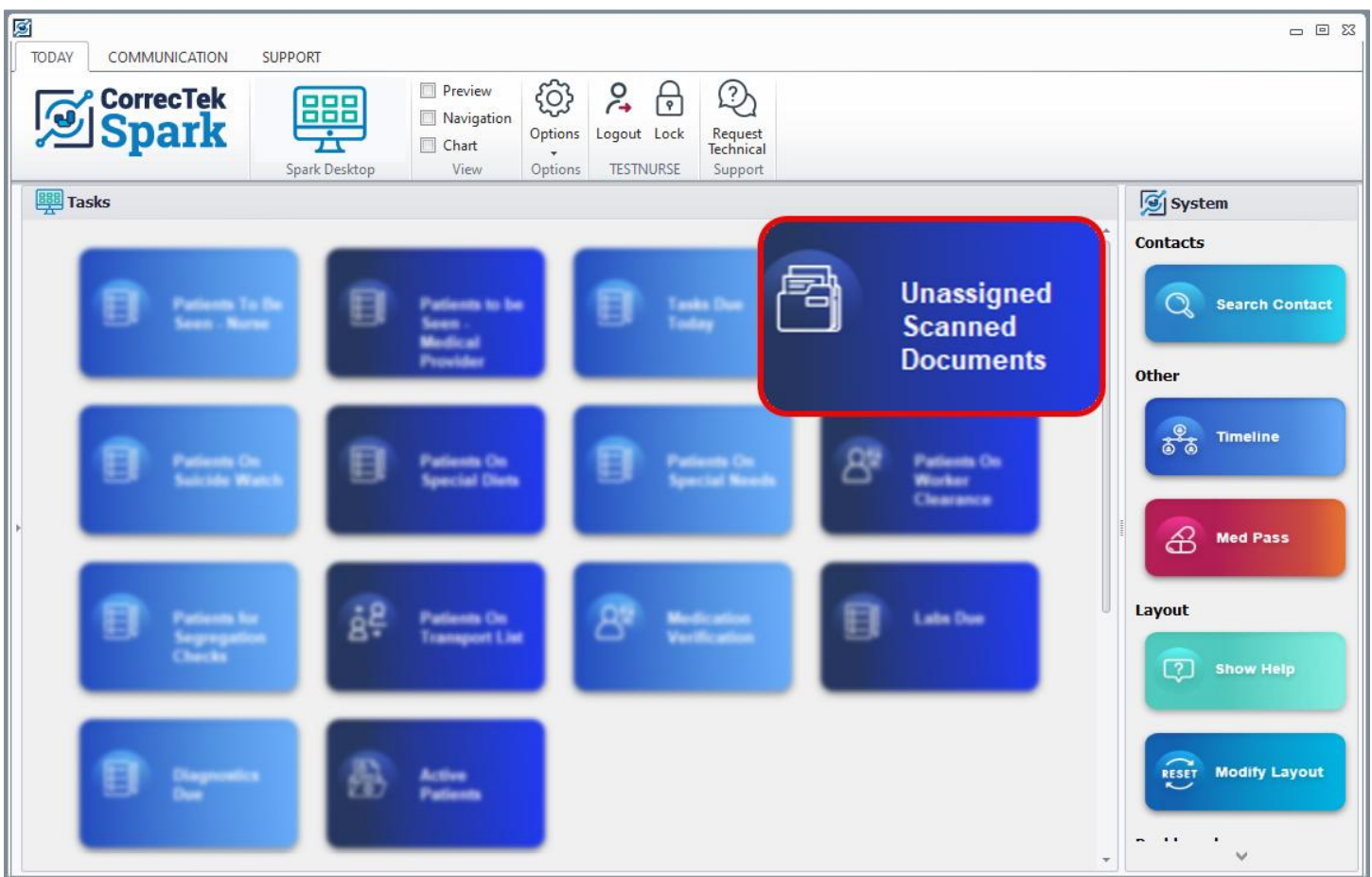
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Unassigned Scanned Documents

Spark Desktop

Begin by scanning the document(s) as instructed by IT.

From the Spark Desktop, click **Unassigned Scanned Documents**.



Tip: Blue buttons are patient driven while green buttons create new patient items.

Unassigned Scanned Documents

Unassigned Scanned Documents

A list of documents without a patient assignment opens.

Click a document to view its **Details**.

Unassigned Scanned Documents as of 03-04-2026 Wed 01:42:17 PM

Unassigned Scanned Documents

Review File Refresh Details Count: 2

Date Added	Category	Patient Unique Identifier
2026-02-10	Imported External Document	
2026-02-10	Imported External Document	

Details:

Zoom Text Size: 6 / 15 Print Save to PDF File

Imported External Document 02-10-2026 Tue 12:48:20 PM

Description	Imported External Document
Comments	
Entered By	Nancy Nurse, RN
Follow Up Complete	No
File Name	2026\2026_02_10\NewFile_ImportedExternalDocument_2.png

For information on viewing details, see Workflow Buttons reference.

Review File

Click **Review File** to open the **External Document** screen and assign the document.

Unassigned Scanned Documents as of 03-04-2026 Wed 01:42:17 PM

Unassigned Scanned Documents

Review File Refresh Details Count: 2

Date Added	Category	Patient Unique Identifier
2026-02-10	Imported External Document	
2026-02-10	Imported External Document	

Details:

Zoom Text Size: 6 / 15 Print Save to PDF File

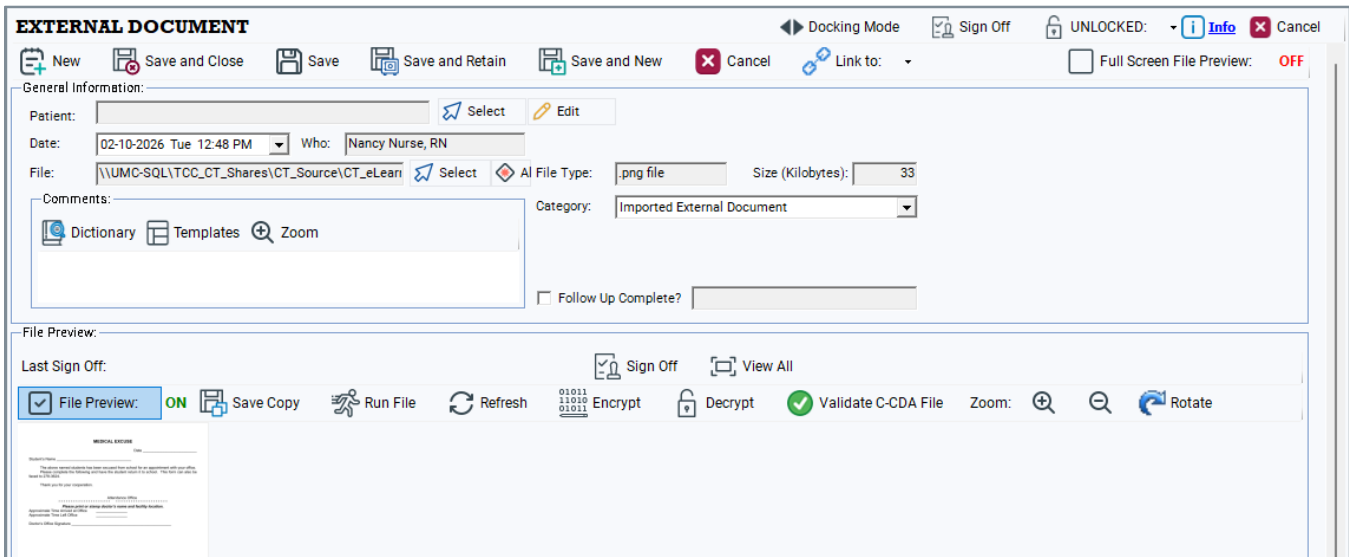
Imported External Document 02-10-2026 Tue 12:48:20 PM

Description	Imported External Document
Comments	
Entered By	Nancy Nurse, RN

Unassigned Scanned Documents

External Document Screen

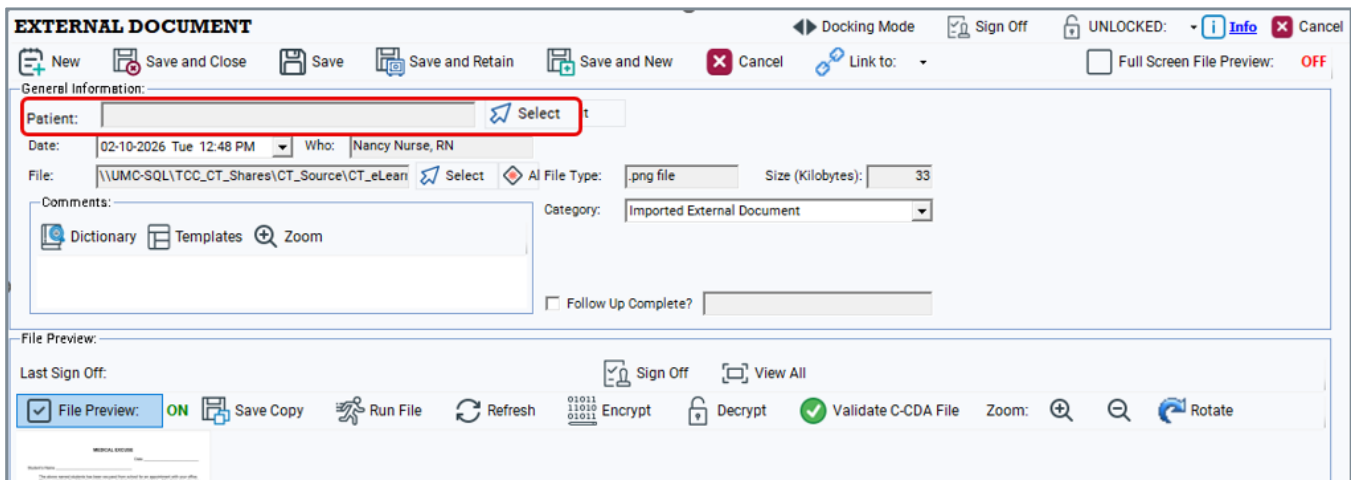
Use this screen to locate and select the patient you want to assign to the document.



The screenshot shows the 'EXTERNAL DOCUMENT' window. The top toolbar includes buttons for New, Save and Close, Save, Save and Retain, Save and New, Cancel, and Link to. It also shows 'Docking Mode', 'Sign Off', 'UNLOCKED', 'Info', and 'Cancel'. The 'General Information' section contains fields for Patient (with a 'Select' button), Date (02-10-2026 Tue 12:48 PM), Who (Nancy Nurse, RN), File (\\UMC-SQL\TCC_CT_Shares\CT_Source\CT_eLearn), AI File Type (.png file), Size (33 Kilobytes), and Category (Imported External Document). There is a 'Comments' section with 'Dictionary', 'Templates', and 'Zoom' icons. A 'Follow Up Complete?' checkbox is at the bottom. The 'File Preview' section shows a 'Last Sign Off' area with 'File Preview: ON', 'Save Copy', 'Run File', 'Refresh', 'Encrypt', 'Decrypt', 'Validate C-CDA File', 'Zoom', and 'Rotate' icons. A small medical record preview is visible on the left.

Select Patient

Click **Select** next to the Patient field.



This screenshot is identical to the previous one, but a red rectangle highlights the 'Patient' field and the 'Select' button next to it, indicating the action to be taken.

Unassigned Scanned Documents



| Tip: If you need to verify the patient information, use the **File Preview**.

Select a Patient Screen

Once initiated, the Select a Patient dialog box opens, serving as a rolodex of all patients in the facility.

Search Patient

Use the **Search Key** field to type identifiable information to locate a patient. Then, click **Search**.

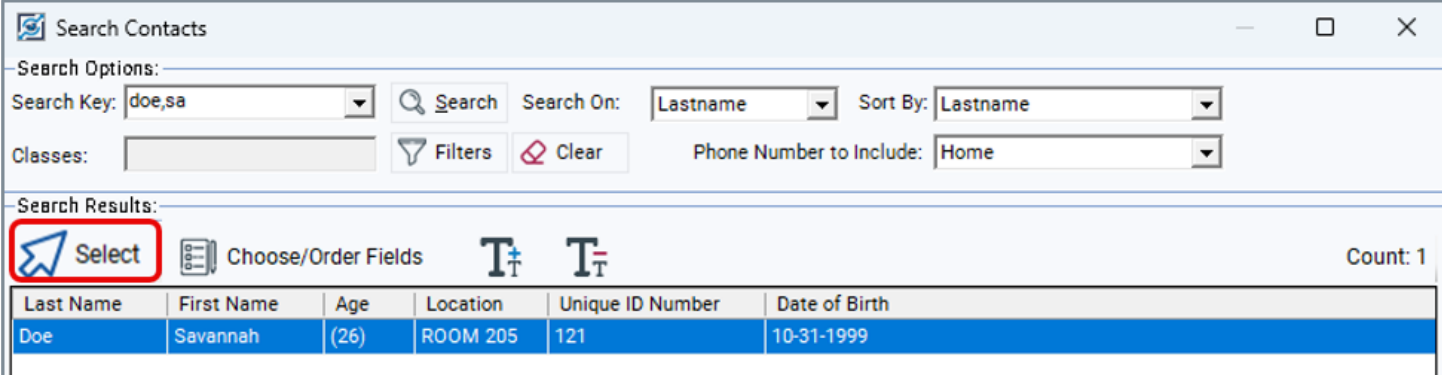
| Tip: Identifiable information could include first and/or last name, ID number, or DOB.

A screenshot of the "Search Contacts" dialog box. The "Search Options" section includes a "Search Key:" field with a dropdown arrow, a "Search" button, a "Search On:" dropdown set to "Lastname", a "Sort By:" dropdown set to "Lastname", a "Classes:" field, a "Filters" button, a "Clear" button, and a "Phone Number to Include:" dropdown set to "Home". The "Search Results:" section has a toolbar with "Select", "Choose/Order Fields", and two text formatting icons (T with a plus and T with a minus). Below the toolbar is a large empty rectangular area for search results.

Select Patient

Locate and select the correct patient in the search results. Click **Select** to return to the **External Document** screen.

Unassigned Scanned Documents



Search Contacts

Search Options:

Search Key: Search Search On: Sort By:

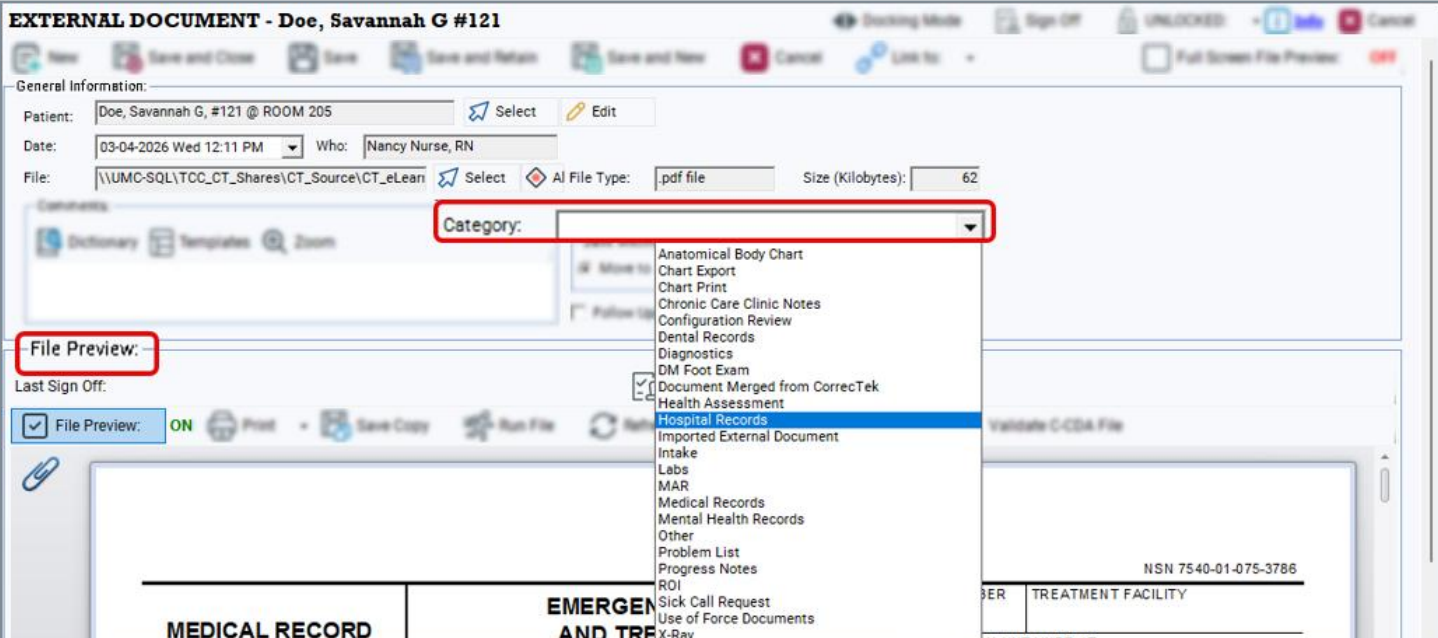
Classes: Filters Clear Phone Number to Include:

Search Results:

Count: 1

Last Name	First Name	Age	Location	Unique ID Number	Date of Birth
Doe	Savannah	(26)	ROOM 205	121	10-31-1999

Select a **Category** to classify the document.



EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient:

Date: Who:

File: AI File Type: Size (Kilobytes):

Category:

- Anatomical Body Chart
- Chart Export
- Chart Print
- Chronic Care Clinic Notes
- Configuration Review
- Dental Records
- Diagnostics
- DM Foot Exam
- Document Merged from CorrecTek
- Health Assessment
- Hospital Records**
- Imported External Document
- Intake
- Labs
- MAR
- Medical Records
- Mental Health Records
- Other
- Problem List
- Progress Notes
- ROI
- Sick Call Request
- Use of Force Documents
- X-Ray

File Preview: ☐ File Preview: ☒ ON

Print Save Copy Run File

MEDICAL RECORD EMERGENCY AND TRAUMA

NSN 7540-01-075-3786

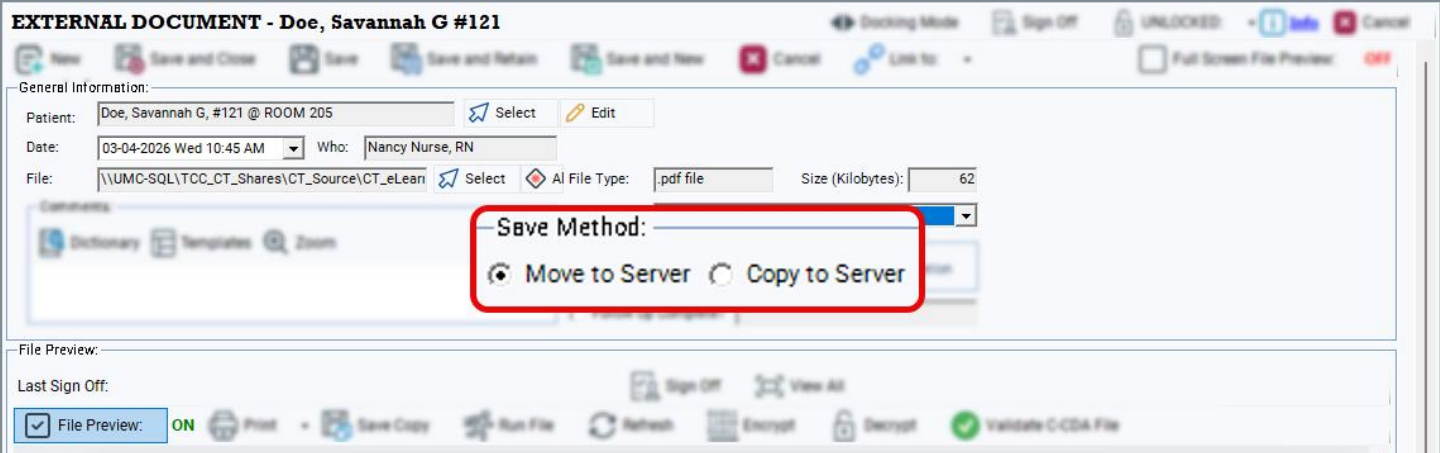
BER TREATMENT FACILITY

RECORDS MAINTAINED AT

For more information on buttons in the File Preview, see [File Preview](#) reference.

Set the Save Method to **Move to Server** or **Copy to Server**.

Unassigned Scanned Documents



EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient: Doe, Savannah G, #121 @ ROOM 205 [Select] [Edit]
Date: 03-04-2026 Wed 10:45 AM [v] Who: Nancy Nurse, RN
File: \\UMC-SQL\TCC_CT_Shares\CT_Source\CT_eLearn [Select] AI File Type: .pdf file Size (Kilobytes): 62

Comments: [Dictionary] [Templates] [Zoom]

Save Method:
☒ Move to Server ☐ Copy to Server

File Preview:

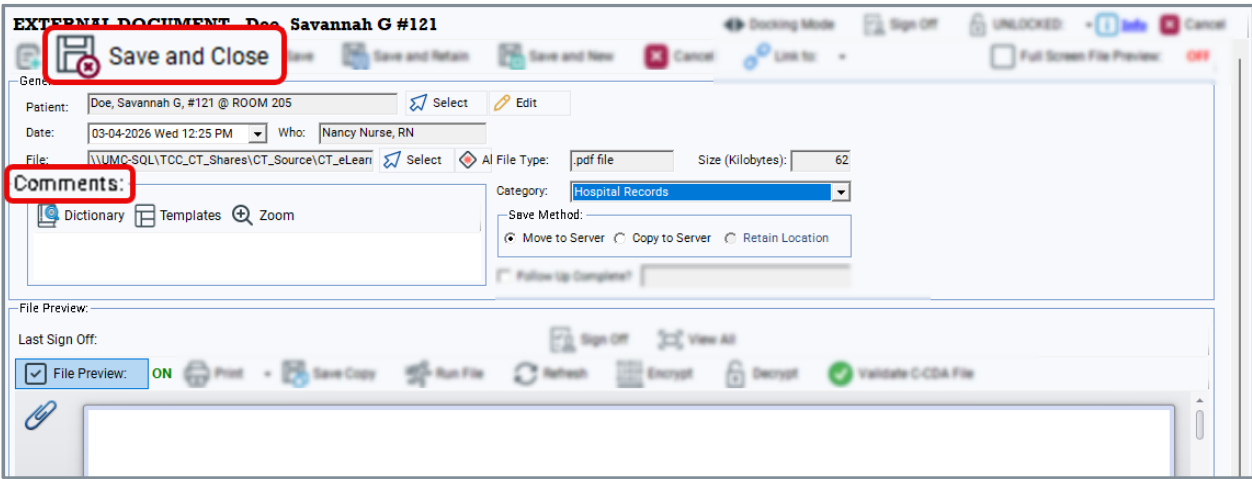
Last Sign Off: [v] File Preview: ON [Print] [Save Copy] [Run File] [Refresh] [Encrypt] [Decrypt] [Validate C-CDI File]

- **Move to Server** – Moves the file to the server.
- **Copy to Server** – Copies the file to the server and keeps the original file in its current location.

Saving to Chart

Enter **Comments** if needed.

Click **Save and Close**.



EXTERNAL DOCUMENT - Doe, Savannah G #121

[Save and Close] [Save] [Save and Retain] [Save and New] [Cancel] [Link to]

General Information:

Patient: Doe, Savannah G, #121 @ ROOM 205 [Select] [Edit]
Date: 03-04-2026 Wed 12:25 PM [v] Who: Nancy Nurse, RN
File: \\UMC-SQL\TCC_CT_Shares\CT_Source\CT_eLearn [Select] AI File Type: .pdf file Size (Kilobytes): 62

Comments: [Dictionary] [Templates] [Zoom]

Category: Hospital Records [v]
Save Method: ☒ Move to Server ☐ Copy to Server ☐ Retain Location

Follow Up Complete? [v]

File Preview:

Last Sign Off: [v] File Preview: ON [Print] [Save Copy] [Run File] [Refresh] [Encrypt] [Decrypt] [Validate C-CDI File]

The document is saved to the chart, and the system returns to **Unassigned Scanned Documents**.

Unassigned Scanned Documents



For more information on this screen, see [References](#)

Workflow Buttons

Details: Displays an item's details.

Refresh: Refreshes the list and removes completed items.

Find: Searches the list for a keyword.

Previous: Finds the previous matching keyword.

Next: Finds the next matching keyword.

T+: Increases the font size.

T-: Decreases the font size.

Grid Options: Adjusts column size and word wrap.

Zoom: Opens the details in a new window.

Print: Opens print options.

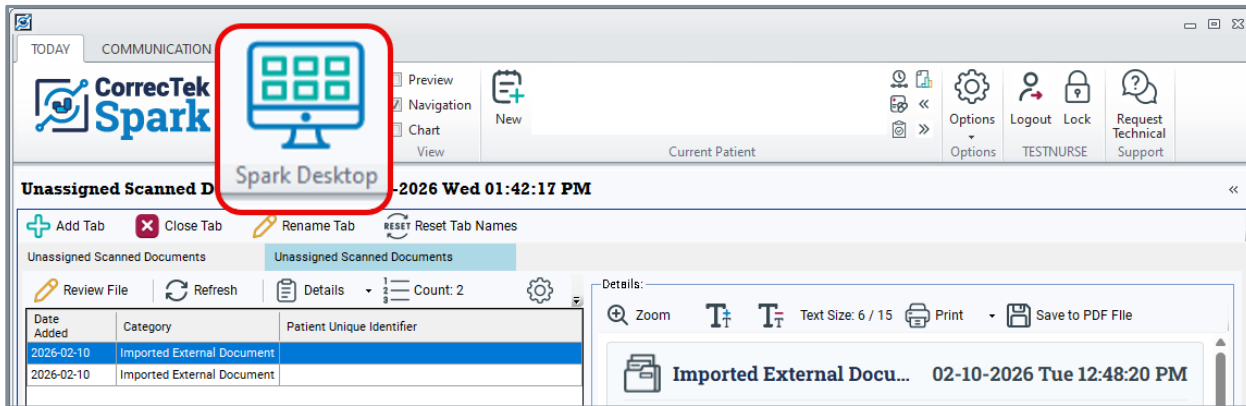
Save to PDF File: Saves the details as a PDF.

External Document reference.

Return to Desktop

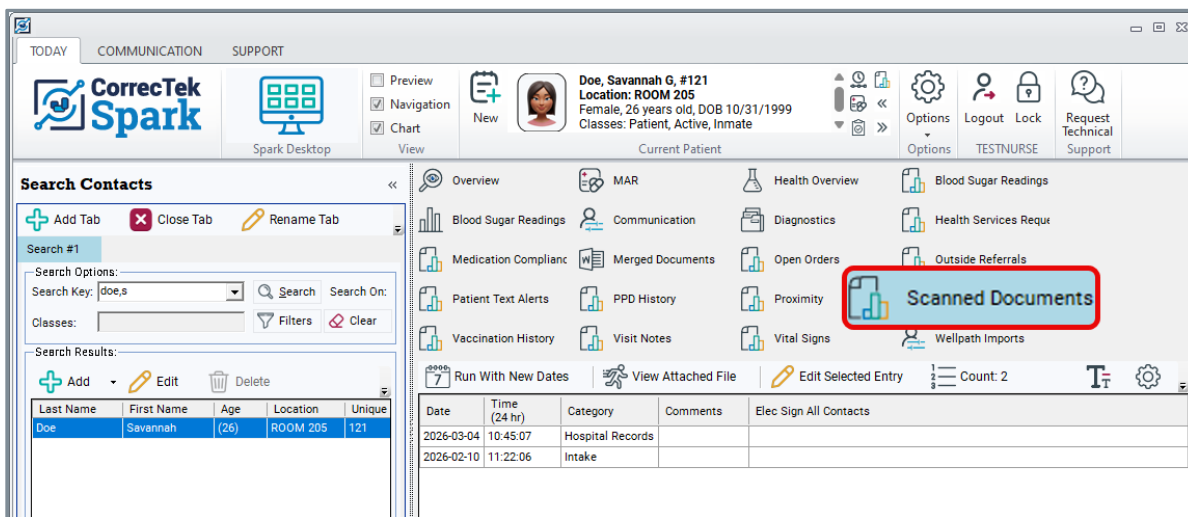
To return to the desktop, click **Spark Desktop**.

Unassigned Scanned Documents



Viewing Scanned Documents

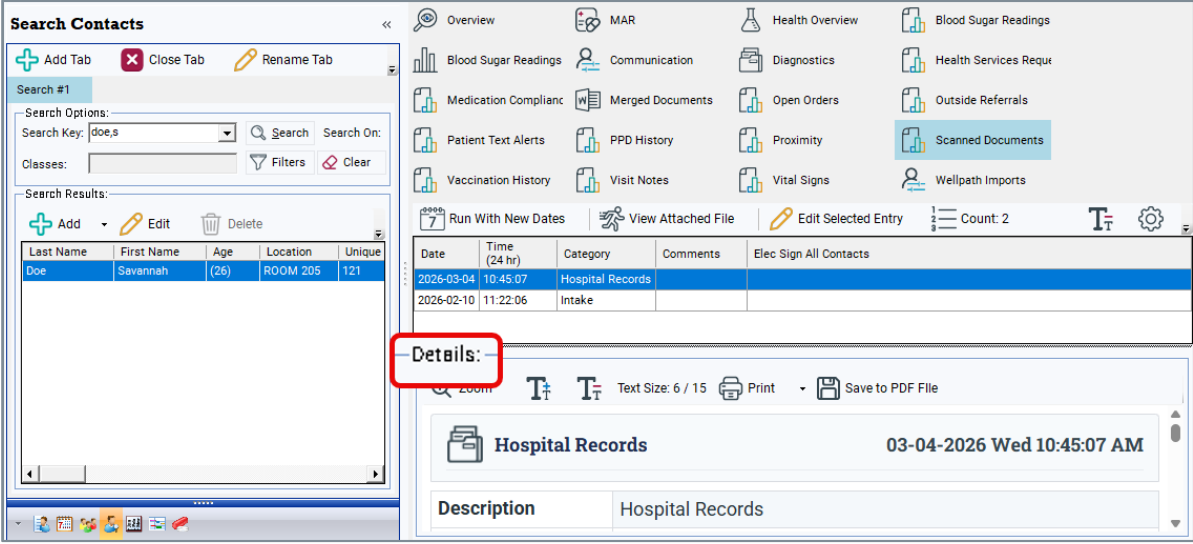
To view the imported document, click **Scanned Document** in the patient's chart.



View Details

Click the document to display it in **Details**.

Unassigned Scanned Documents



Search Contacts

Search Options:
Search Key: Search On:
Classes: Filters

Search Results:

Last Name	First Name	Age	Location	Unique
Doe	Savannah	(26)	ROOM 205	121

Details:

Run With New Dates View Attached File Edit Selected Entry Count: 2

Date	Time (24 hr)	Category	Comments	Elec Sign All Contacts
2026-03-04	10:45:07	Hospital Records		
2026-02-10	11:22:06	Intake		

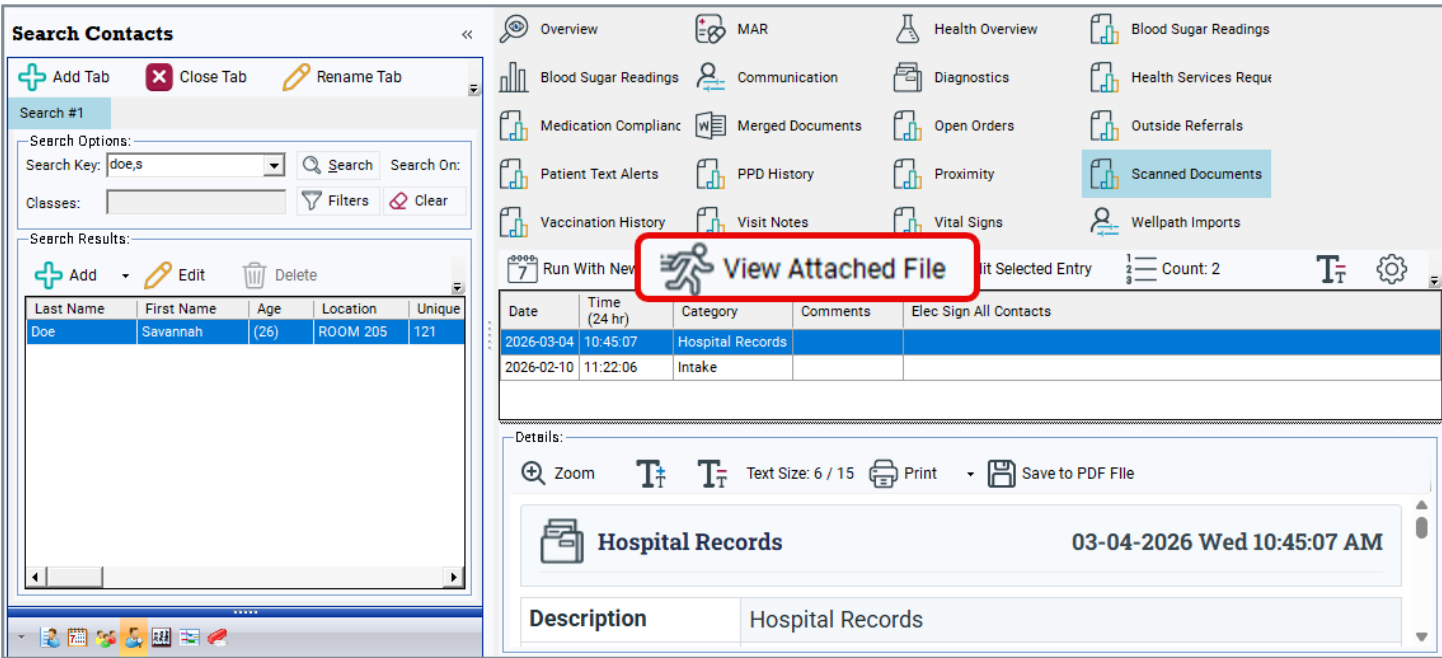
Text Size: 6 / 15 Print Save to PDF File

Hospital Records 03-04-2026 Wed 10:45:07 AM

Description Hospital Records

View Attached File

Click **View Attached File** to view the document in a separate window.



Search Contacts

Search Options:
Search Key: Search On:
Classes: Filters

Search Results:

Last Name	First Name	Age	Location	Unique
Doe	Savannah	(26)	ROOM 205	121

View Attached File

Run With New Dates View Attached File Edit Selected Entry Count: 2

Date	Time (24 hr)	Category	Comments	Elec Sign All Contacts
2026-03-04	10:45:07	Hospital Records		
2026-02-10	11:22:06	Intake		

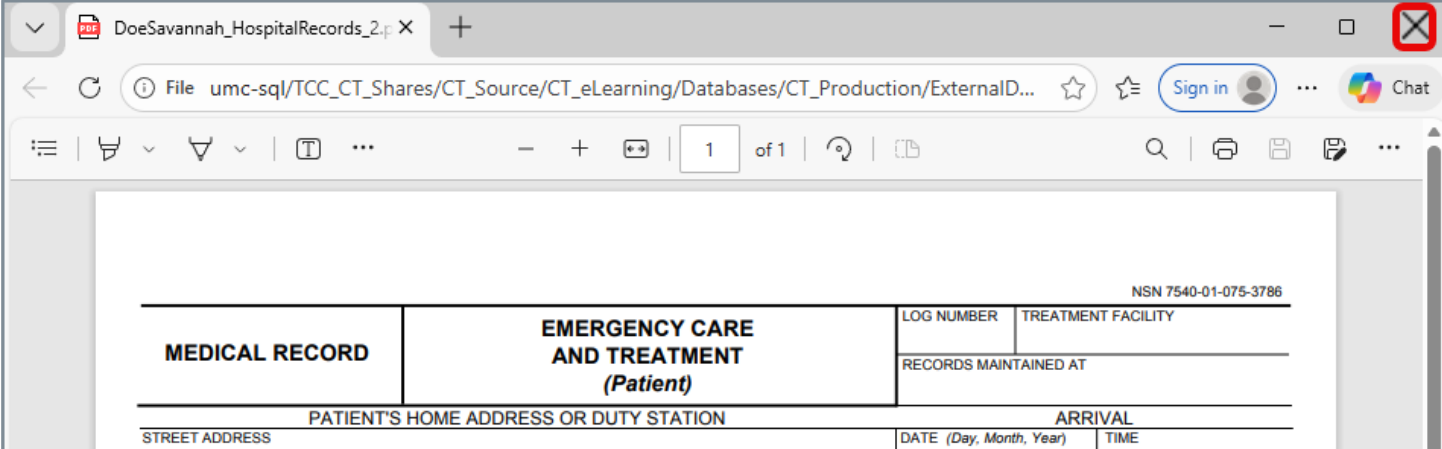
Text Size: 6 / 15 Print Save to PDF File

Hospital Records 03-04-2026 Wed 10:45:07 AM

Description Hospital Records

Click **X** to close the document.

Unassigned Scanned Documents

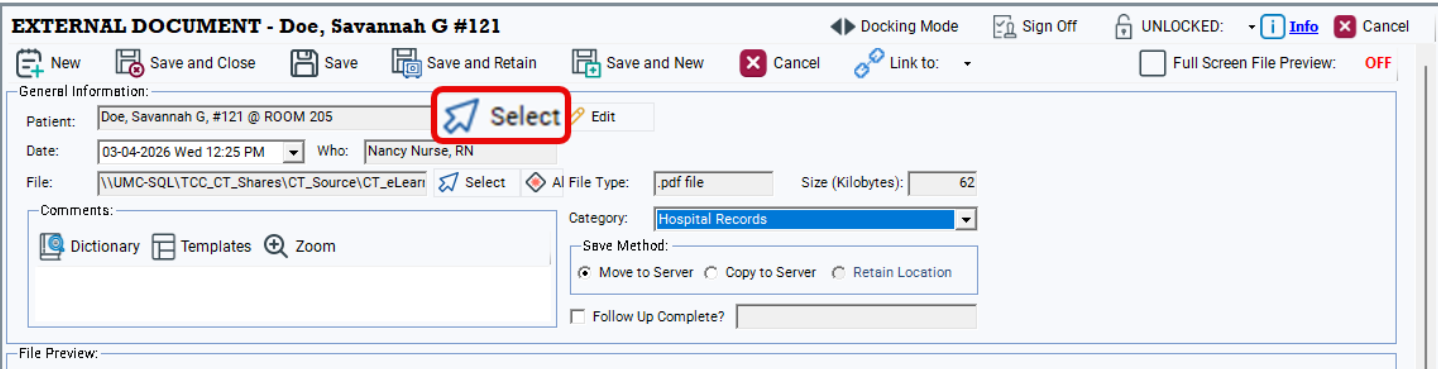


MEDICAL RECORD		EMERGENCY CARE AND TREATMENT (Patient)		LOG NUMBER	TREATMENT FACILITY
PATIENT'S HOME ADDRESS OR DUTY STATION		STREET ADDRESS		DATE (Day, Month, Year)	ARRIVAL TIME

Commonly Asked Questions

Question: I assigned a document to the wrong patient. How can I quickly assign it to the correct patient?

Answer: If the wrong patient name appears for the selected document, click **Select** in the **Patient** field.



EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient: Doe, Savannah G, #121 @ ROOM 205 **Select** Edit

Date: 03-04-2026 Wed 12:25 PM Who: Nancy Nurse, RN

File: \\UMC-SQL\TCC_CT_Shares\CT_Source\CT_eLearn Select AI File Type: .pdf file Size (Kilobytes): 62

Comments: Dictionary Templates Zoom

Category: Hospital Records

Save Method: ☒ Move to Server ☐ Copy to Server ☐ Retain Location

☐ Follow Up Complete?

The Search Contacts screen will open. Search for and select the patient following standard procedures. After selecting the patient, click **Save and Close** to save the changes.

Unassigned Scanned Documents



Question: I am scanning a new document. I do not have an applicable **Category** available. What do I do?

Answer: It is best to seek assistance from a local administrator at your facility. If a new **Category** is needed, the local Administrator can create new Categories as needed.

Related Courses

- [View Chart](#)

Unassigned Scanned Documents



References

Workflow Buttons

Details: Displays an item's details.

Refresh: Refreshes the list and removes completed items.

Find: Searches the list for a keyword.

Previous: Finds the previous matching keyword.

Next: Finds the next matching keyword.

T+: Increases the font size.

T-: Decreases the font size.

Grid Options: Adjusts column size and word wrap.

Zoom: Opens the details in a new window.

Print: Opens print options.

Save to PDF File: Saves the details as a PDF.

External Document

New: Creates a new item, such as an order or prescription.

Save: Saves the document without closing the screen.

Save and Retain: Saves the document and retains the patient, category, and save method to import another file.

Save and New: Saves the document and clears the screen to attach another file.

Unassigned Scanned Documents



Cancel: Cancels the import request.

File Preview

File Preview: Toggles the preview on or off.

Save Copy: Saves a copy of the document.

Run File: Opens the file in a separate window.

Refresh: Refreshes the screen.

Encrypt: Encrypt the file with a password.

Decrypt: Enter a password to view an encrypted file.

Validate C-CDA File: Primarily used in ambulatory settings. Verifies the document meets HL7 C-CDA standards.