

Upload an External Document



Course Overview

External documents are used to add outside records, such as scanned files or reports, to a patient's chart to support complete and accurate documentation.

This guide walks you through how to attach an external document in CorrecTek Spark for non-hosted environments. Documents are assumed to be scanned and saved to an accessible location following your facility's process.

Use This Guide When

- Adding an outside document to a patient's chart
- Uploading a scanned document from your computer
- Selecting a patient for the document

What You'll Be Able to Do

- Upload a scanned document
- Save a document to a patient's record
- View the document in the chart

Upload an External Document



Topics Covered

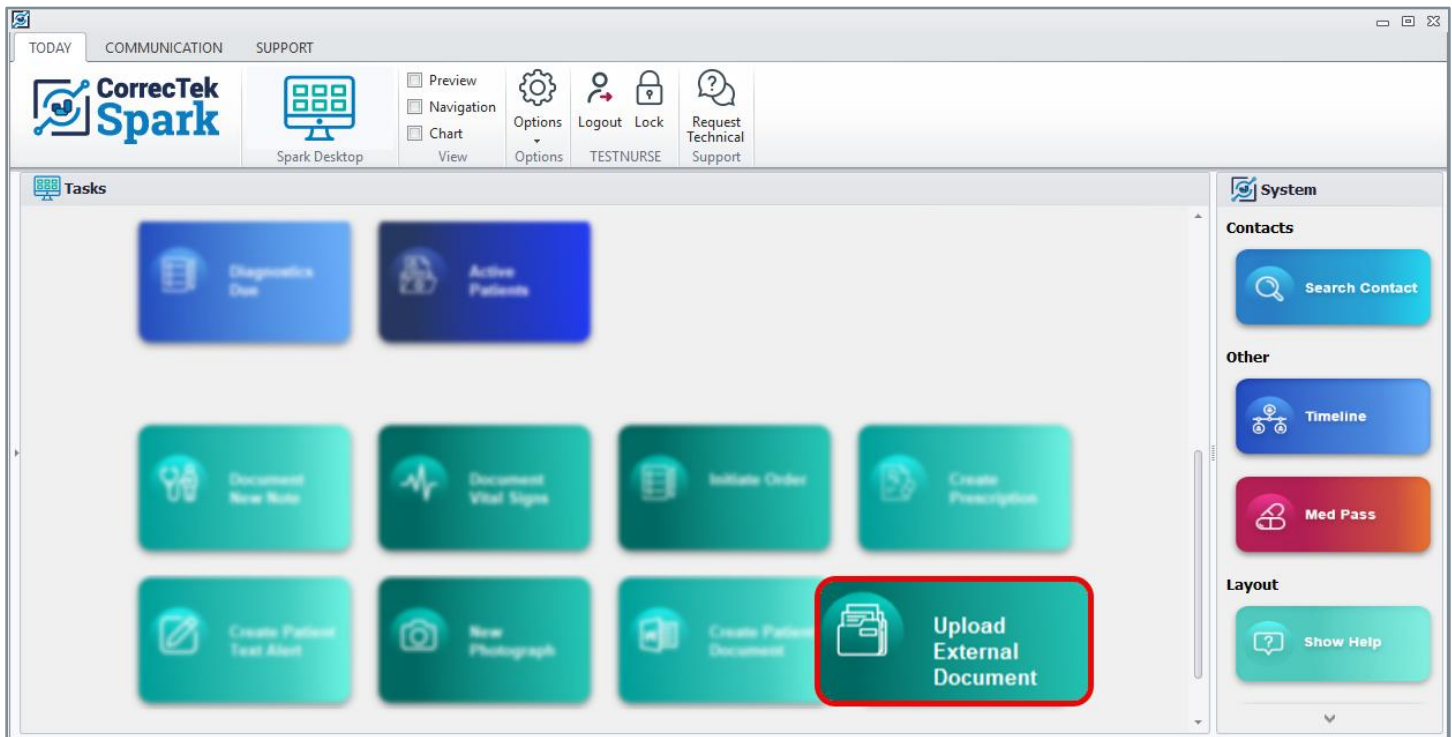
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Upload an External Document



Spark Desktop

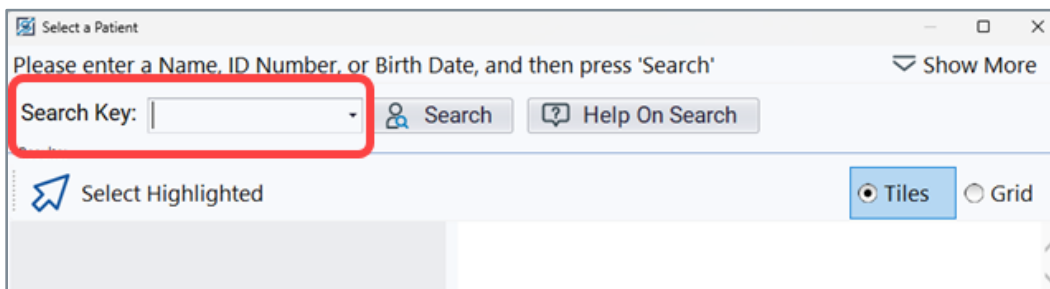
From the Spark Desktop, click **External Document**.



Select a 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.



Upload an External Document

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

| Tip: Demographic and Contact Information displays to the right when a patient is highlighted.



Select a Patient

Please enter a Name, ID Number, or Birth Date, and then press 'Search' Show More

Search Key: Search Help On Search

Results:

Select Highlighted:
Doe, Savannah G

Doe, Savannah G
DOB: 10-31-1999
LOCATION: ROOM 205
UNIQUE ID #: 121
SEX: F
RACE:

Savannah G Doe
ID: 121
Gender: Female
DOB: 10-31-1999 Sun

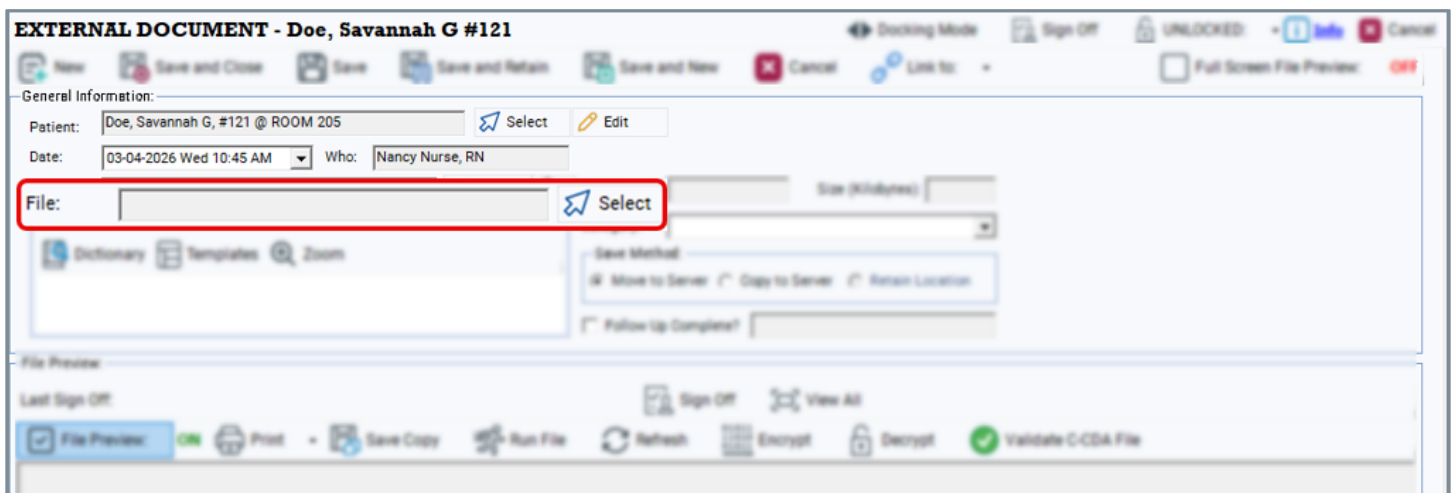
DEMOGRAPHICS

Account Number	121
----------------	-----

External Document Screen

Use this screen to locate and assign a document to a patient.

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



EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient: Select Edit

Date: Who:

File: Select

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

☐ Follow Up Complete?

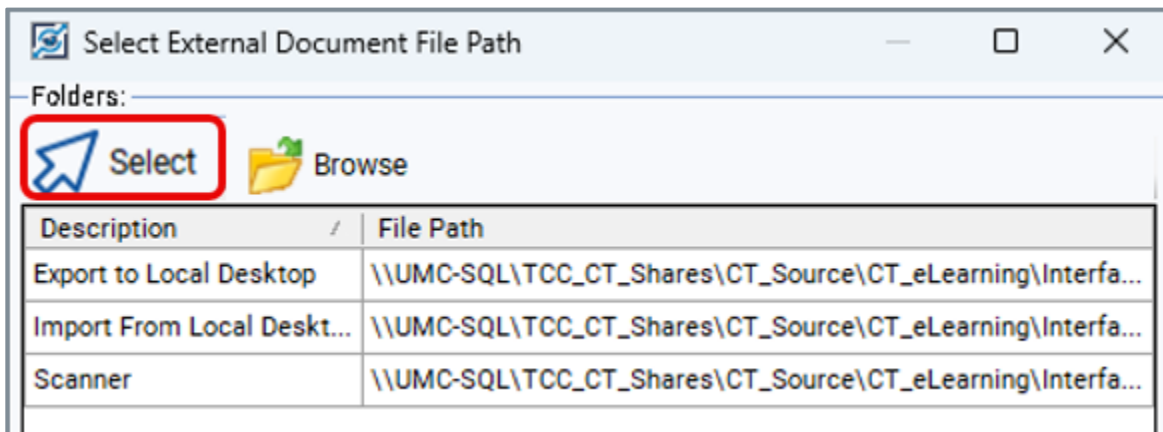
File Preview:

Last Sign Off:

☒ File Preview Print Save Copy Run File Refresh Encrypt Decrypt Validate C-DA File

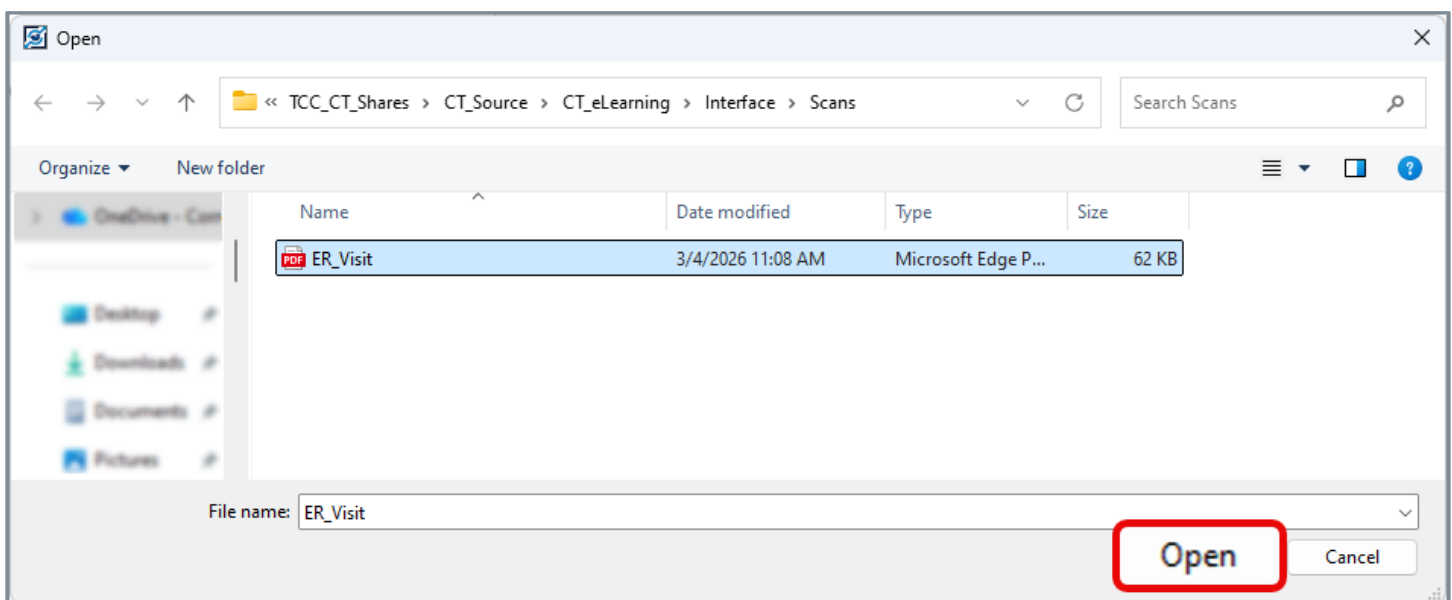
Upload an External Document

When selecting a document for the first time, the **Select External Document File Path** window opens. Choose a location, then click **Select**.



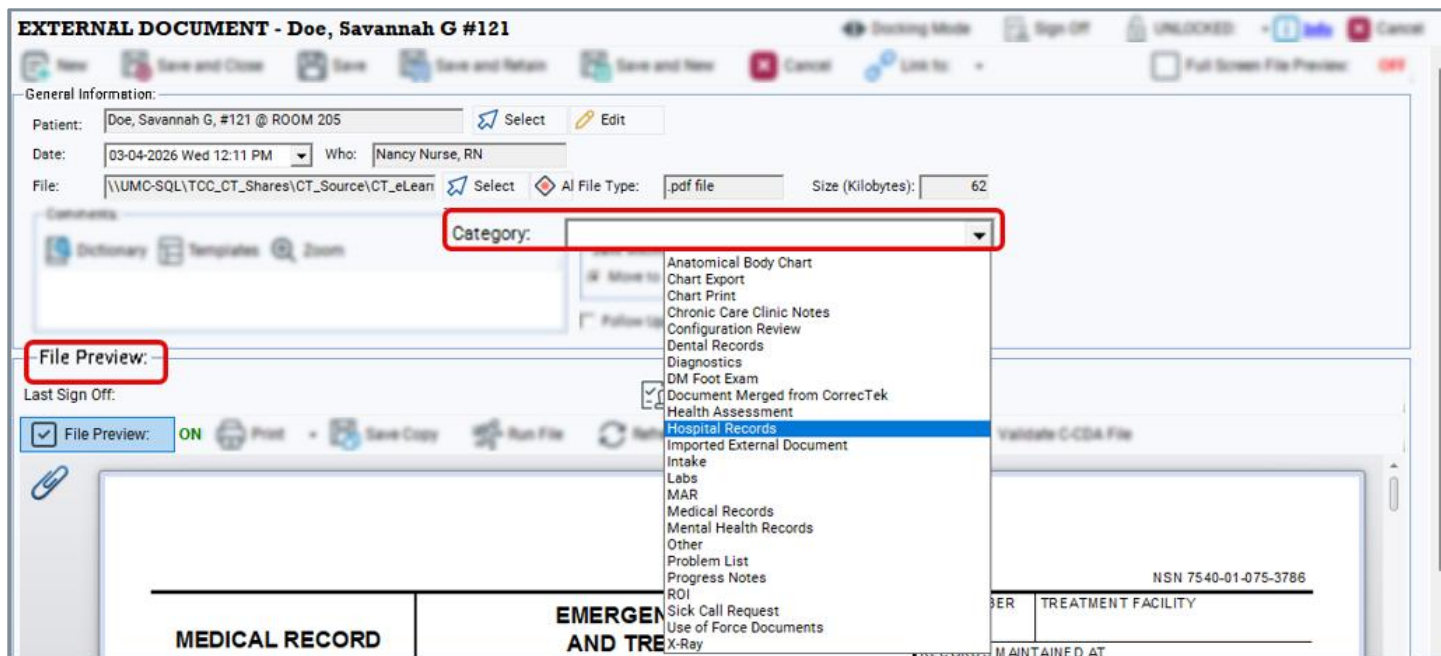
Tip: If the path is not listed, click **Browse** to find it.

Select the appropriate file, then click **Open**.



Upload an External Document

The document displays in the **File Preview**. Select a **Category** to classify it.



The screenshot shows the 'EXTERNAL DOCUMENT' window for 'Doe, Savannah G #121'. The 'General Information' section includes Patient, Date, Who, File, and File Type. The 'Category' dropdown menu is open, showing a list of categories. The 'File Preview' section is visible at the bottom.

EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient: Doe, Savannah G, #121 @ ROOM 205

Date: 03-04-2026 Wed 12:11 PM Who: Nancy Nurse, RN

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

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
- Leads
- MAR
- Medical Records
- Mental Health Records
- Other
- Problem List
- Progress Notes
- ROI
- Sick Call Request
- Use of Force Documents
- X-Ray

File Preview:

Last Sign Off:

File Preview: ON

Print Save Copy Run File Refresh

MEDICAL RECORD EMERGENCY AND TRAUMA

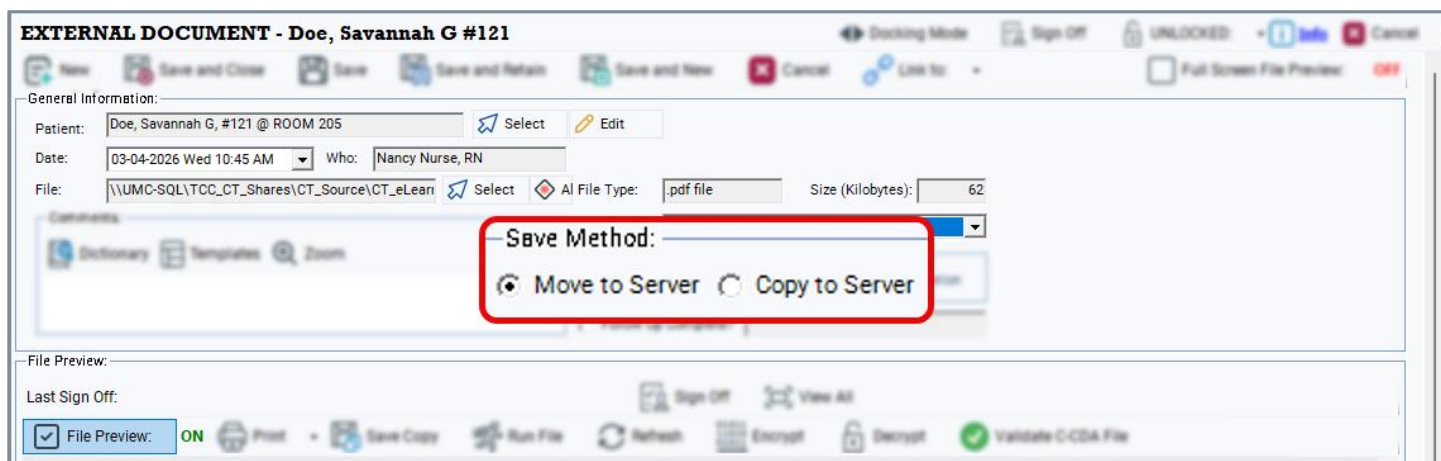
NSN 7540-01-075-3786

TREATMENT FACILITY

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

Select a **Save Method**:

- **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.



The screenshot shows the 'EXTERNAL DOCUMENT' window for 'Doe, Savannah G #121'. The 'General Information' section includes Patient, Date, Who, File, and File Type. The 'Save Method' dropdown menu is open, showing two options: 'Move to Server' and 'Copy to Server'.

EXTERNAL DOCUMENT - Doe, Savannah G #121

General Information:

Patient: Doe, Savannah G, #121 @ ROOM 205

Date: 03-04-2026 Wed 10:45 AM Who: Nancy Nurse, RN

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

Save Method:

- ☒ Move to Server
- ☐ Copy to Server

File Preview:

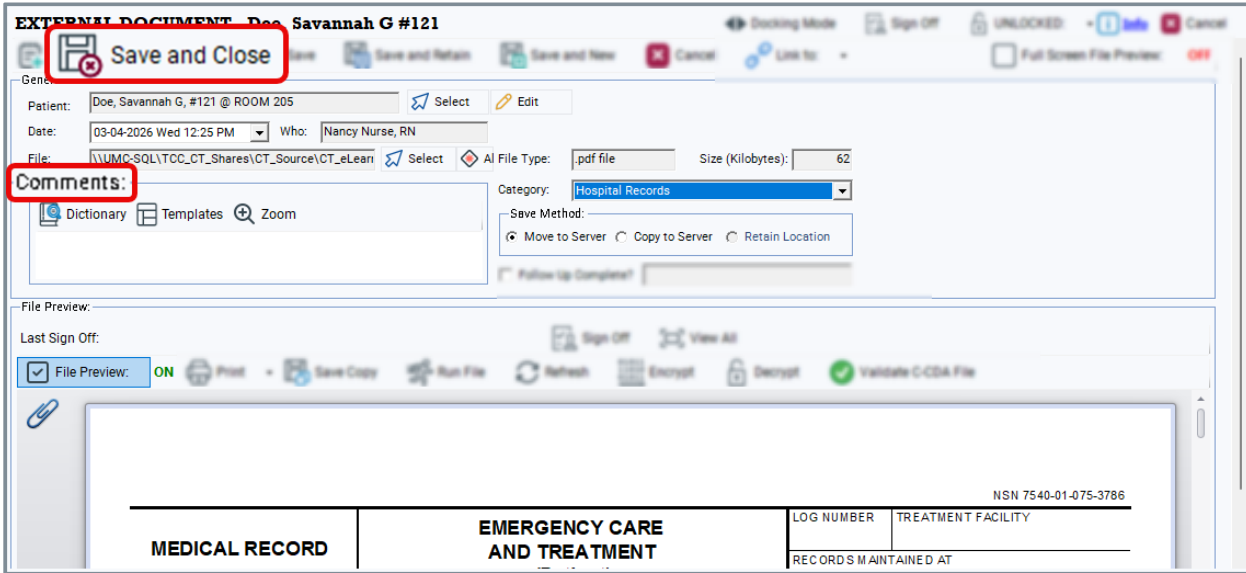
Last Sign Off:

File Preview: ON

Print Save Copy Run File Refresh Sign Off View All Encrypt Decrypt Validate C-CDA File

Upload an External Document

Enter **Comments** if needed, then click **Save and Close**.



EXTERNAL DOCUMENT Doe, Savannah G #121

Save Save and Retain Save and New Cancel Link to Full Screen File Preview: OFF

Save and Close

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

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

File: \\UUMC-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?

File Preview:

Last Sign Off: ☒ File Preview: ON Print Save Copy Run File Refresh Encrypt Decrypt Validate C-SDA File

NSN 7540-01-075-3786

MEDICAL RECORD	EMERGENCY CARE AND TREATMENT	LOG NUMBER	TREATMENT FACILITY
RECORDS MAINTAINED AT			

Tip: If additional documents need to be attached, repeat the process for each file.

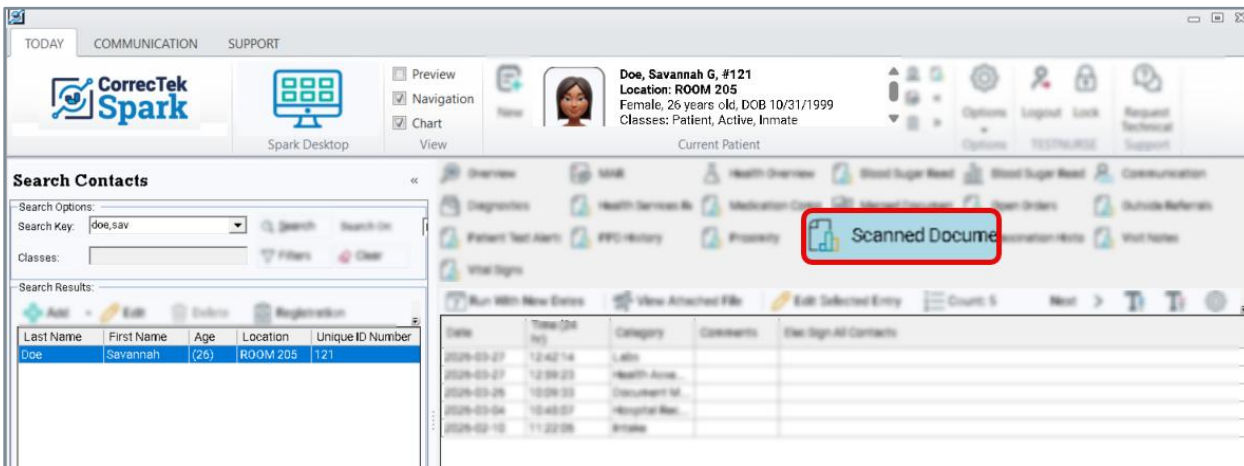
The document is saved to the chart, and the system returns to the **Spark Desktop**.

For details about the fields in this section, see the [External Document](#) reference.

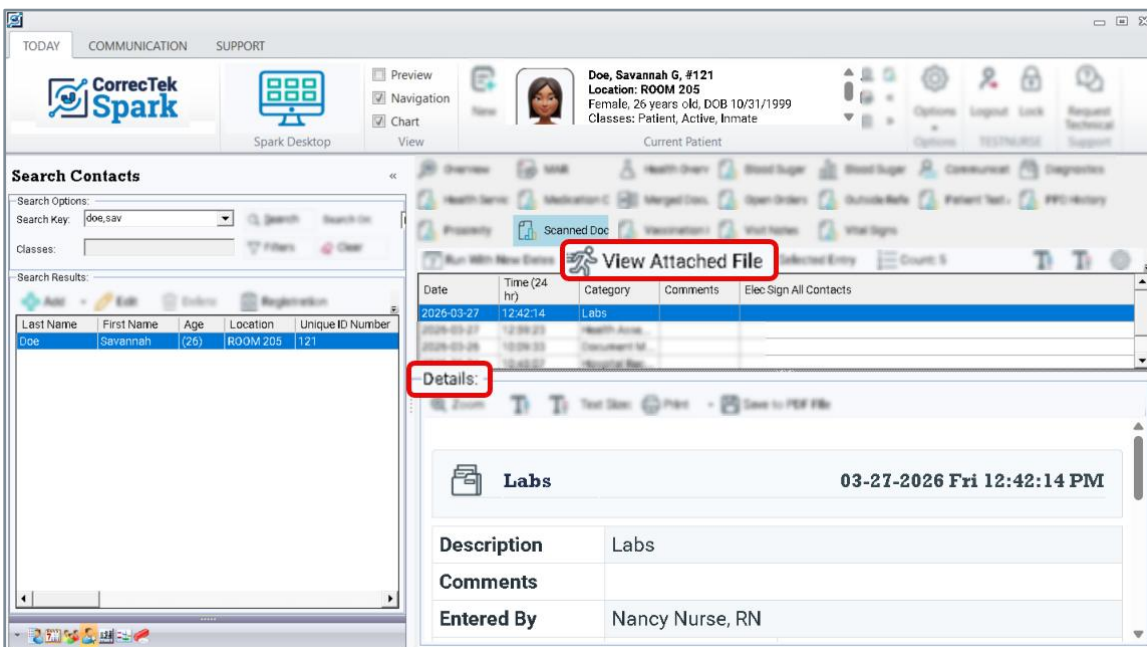
View Scanned Documents

Open the patient's chart, then click **Scanned Documents**.

Upload an External Document

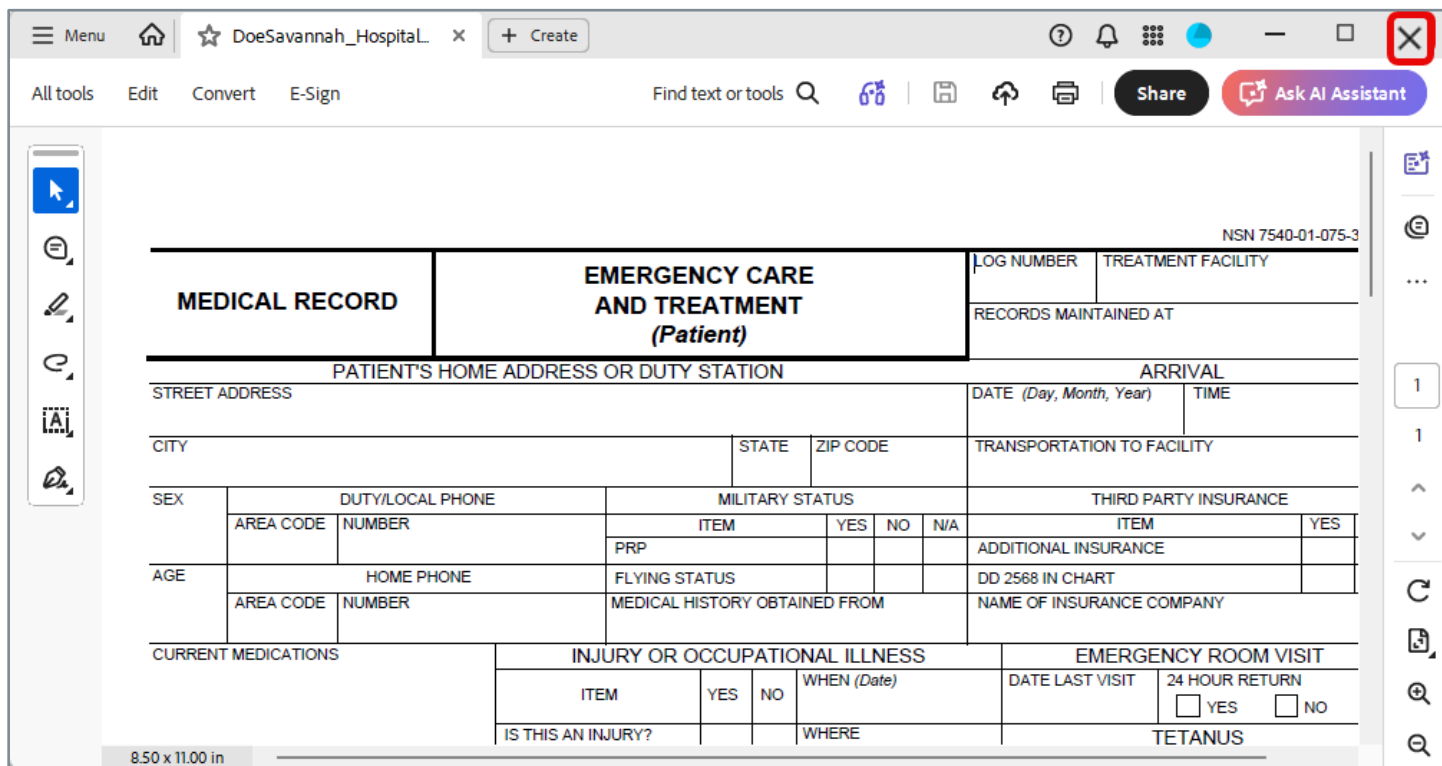


Select the document to display in **Details** or click **View Attached File** to open it in a separate window.



Click **X** to close the document.

Upload an External Document



Menu Home DoeSavannah_HospitalL x + Create

All tools Edit Convert E-Sign Find text or tools Q 66 | [Save] [Share] Ask AI Assistant

NSN 7540-01-075-3

MEDICAL RECORD		EMERGENCY CARE AND TREATMENT (Patient)				LOG NUMBER	TREATMENT FACILITY
						RECORDS MAINTAINED AT	
PATIENT'S HOME ADDRESS OR DUTY STATION						ARRIVAL	
STREET ADDRESS						DATE (Day, Month, Year)	TIME
CITY				STATE	ZIP CODE	TRANSPORTATION TO FACILITY	
SEX	DUTY/LOCAL PHONE		MILITARY STATUS			THIRD PARTY INSURANCE	
	AREA CODE	NUMBER	ITEM	YES	NO	N/A	ITEM
			PRP				ADDITIONAL INSURANCE
AGE	HOME PHONE		FLYING STATUS			DD 2568 IN CHART	
	AREA CODE	NUMBER	MEDICAL HISTORY OBTAINED FROM			NAME OF INSURANCE COMPANY	
CURRENT MEDICATIONS			INJURY OR OCCUPATIONAL ILLNESS			EMERGENCY ROOM VISIT	
			ITEM	YES	NO	WHEN (Date)	DATE LAST VISIT
							24 HOUR RETURN
							☐ YES ☐ NO
			IS THIS AN INJURY?			TETANUS	

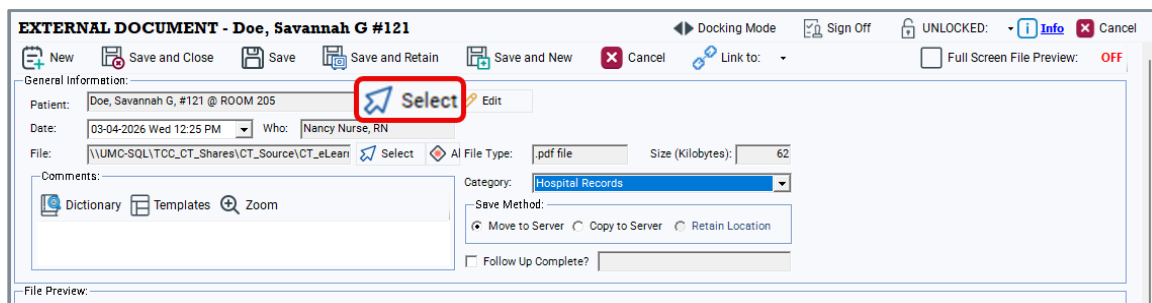
8.50 x 11.00 in

Commonly Asked Questions

Question: I assigned a document to the wrong patient. How do I correct it?

Answer: Click **Select** in the Patient field on the **External Document** screen.

Search for and select the correct patient, then click **Save and Close**.



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? []

Question: I am scanning a new document and do not see an appropriate **Category**. What should I do?

Answer: Contact your facility administrator. New categories can be created as needed.

Upload an External Document



Related Courses

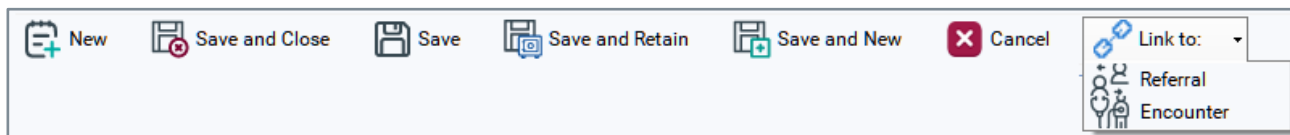
- [View Chart](#)

Upload an External Document

References

External Document

The following buttons appear on the External Document screen (left to right).



New: Starts a new document entry.

Save and Close: Saves the document and returns to the Spark desktop.

Save: Saves the document without closing the screen.

Save and Retain: Saves the document and retains current selections to attach another file.

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

Cancel: Cancels the document upload request.

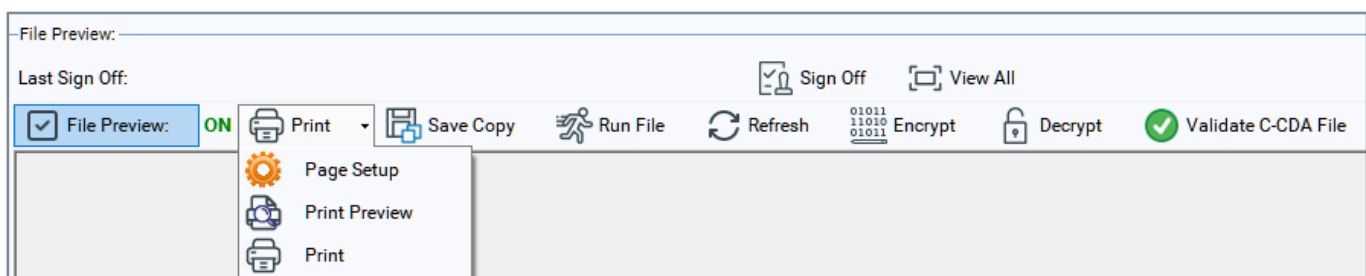
Link to options:

Referral: Opens the timeline allowing the document to be linked to an outside referral record.

Encounter: Opens the timeline allowing the document to be linked to an existing encounter.

File Preview

The following buttons appear in the File Preview dialog box (left to right).



Sign Off: Allows the user to electronically sign off on the record.

Upload an External Document



View All: Shows the Log of the current entry which includes all electronic signatures with the corresponding dates/times signed.

File Preview: Shows or hides the document preview.

Print: Prints the outside record.

Save Copy: Saves a copy of the document.

Run File: Opens the document in a separate window.

Refresh: Refreshes the screen.

Encrypt: Protects the document with a password.

Decrypt: Allows entry of a password to view a protected document.

Validate C-CDA File: Verifies the document meets HL7 C-CDA standards.