



Snapshots

Snapshots

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Publish Preview

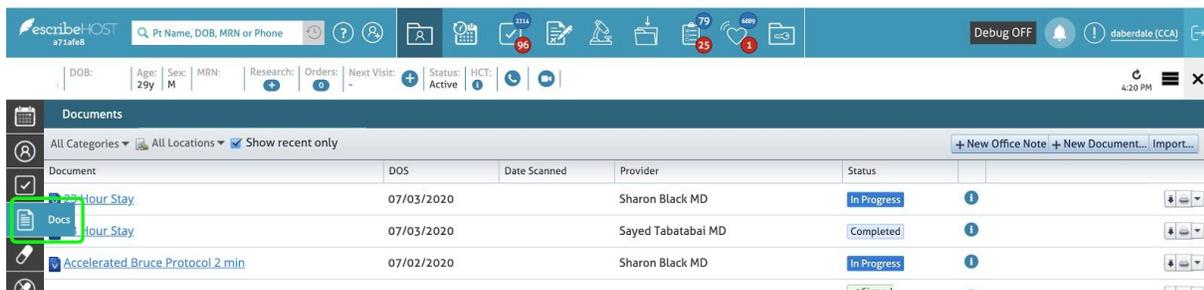
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Snapshots

The snapshots feature automatically generates a PDF snapshot each time a user signs a document. This PDF document is the official record, and will not change if other patient info is changed.

Create signed Snapshot

Navigate to the **Docs** module on the left side menu.



Select a document to sign.



Click the **Sign** button.



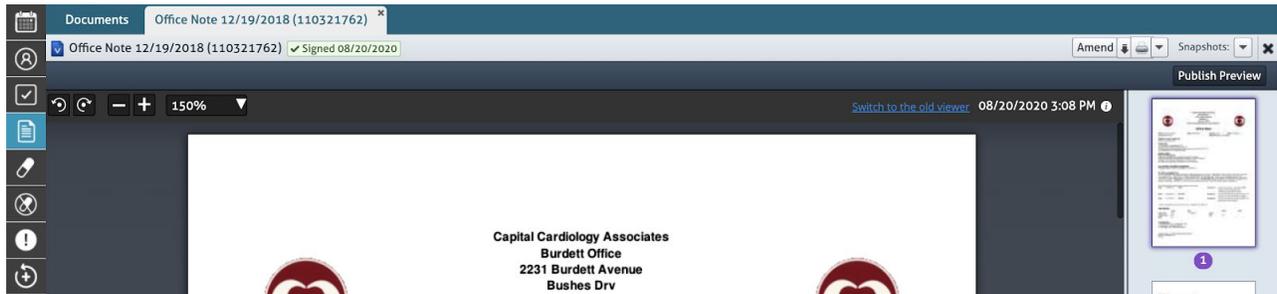
The system creates a new **Snapshot** automatically, whenever any document is **signed**.



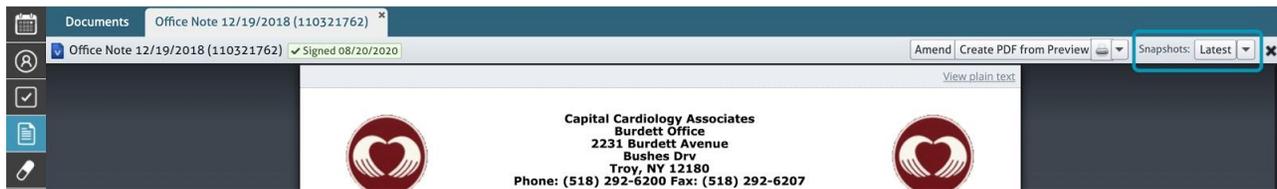
Viewing the latest Snapshot

The latest snapshot displays by default when opening signed documents.

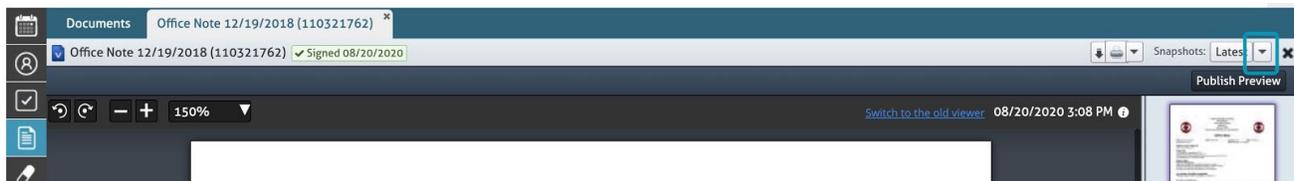
*NOTE: when a signed note is opened, if that note is older (before August 2020) and does not yet have any snapshots, a snapshot is created immediately, based on the **current** publishing preview.*



If you navigate to another snapshot or the publishing preview, you can return to the latest snapshot by clicking the **Latest** button.



If you want to review a specific snapshot, click the **arrow** next to **Snapshots** to choose the snapshot you want to review. All available snapshots are displayed, including the latest. If the note has been signed more than once, the previous snapshots will display here as well.



Amend the document and sign again

Click the **Amend** button on a signed document if you wish to make further changes.

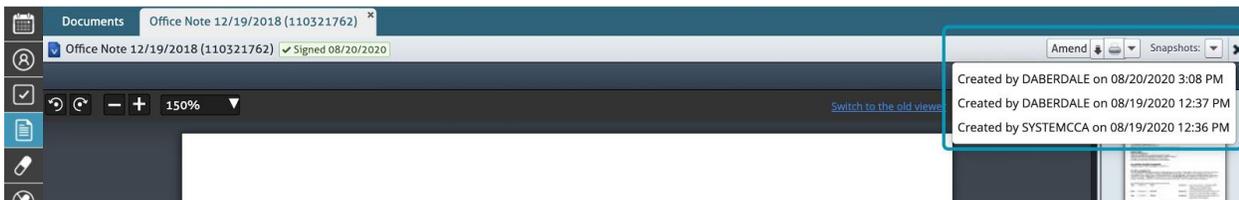
Note: The amend button is only when viewing the latest snapshot, and not a specific snapshot. (Only the latest version can be amended.)



Click the **Sign** button after making the changes.

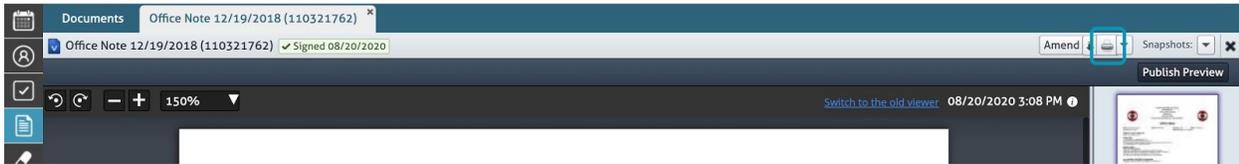


The system creates a new **Snapshot** every time you click the **Sign** button.



Printing a Snapshot

When viewing the latest snapshot OR a specific previous snapshot, click the **Print** icon to print the PDF for that snapshot.



The PDF opens in a new tab. Click the **Print** icon to launch the browser print dialog.



Downloading a Snapshot

In order to download the snapshot, Click the **Download** icon.

The download starts immediately.



Publish Preview

Viewing Publish Preview

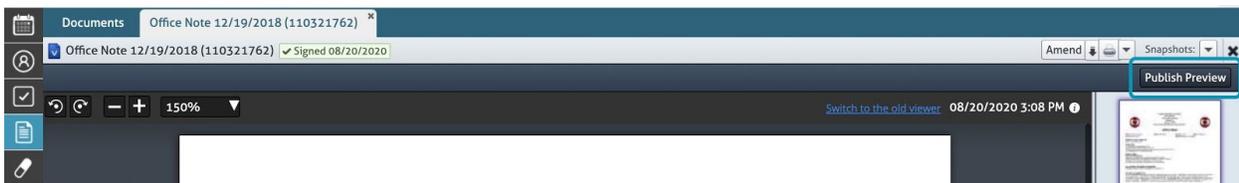
Publish preview is the latest up-to-date info for the document, using information from all patient chart sections (e.g.: meds, med concerns, etc).

It can be viewed at any time, and includes addendums like the datasheet.

NOTE: if a medication is added, backdated so that it overlaps with an office visit, the publish preview WILL show this medication, but existing snapshots will NOT change.

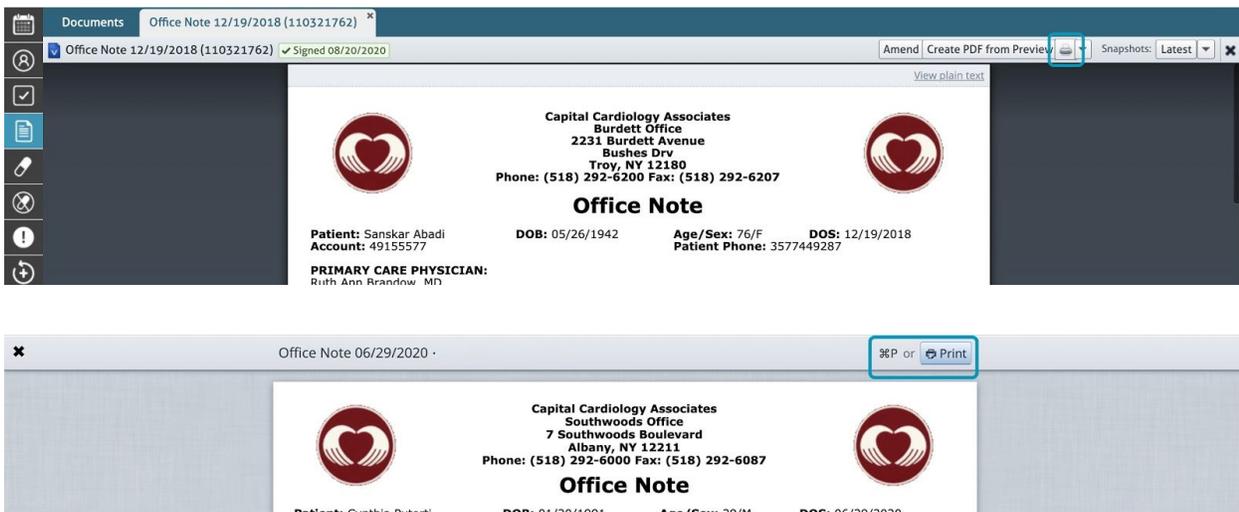
The publish preview shows the information that will be used to create the snapshot upon signing.

Click **Publish Preview** to view this information.



Printing Publish Preview

Click the **Print** button to open the preview in a new tab, and start the printing process. This prints the preview, not the snapshot.



Downloading Publish Preview

Click the **Create PDF from Preview** button to download a copy of the preview, converted to a PDF.

Note that the file name of the PDF ends in “preview”, to distinguish such PDFs from snapshot PDFs.

