# **Contact Mover Tutorial**

The contact mover is designed to move a document from one patient (source patient) to another patient (target patient). The document will be retracted from the source patient and then appear in the target patients' chart.

### Assumptions:

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- The document was sent to the CDR/DR from EPIC (All EPIC documents are in PDF form, no text)

   Limited to Notes, Operative Reports and Discharge Summaries
  - The content of the PDF including source patient MRN and name will not change after a contact move
- User has the SITE MRN of the SOURCE and TARGET patient

## Steps to move a document:

- 1. Open Results Web (http://clinical.partners.org/scripts/phsweb.swl?APP=CDRWEB&PKG=7)
- 2. Select source patient that has the result that needs to move
- 3. Find the result in the patients' chart
- 4. Top right of the PDF there will be a button called "ContactMover"
  - a. User needs PAS authorization (CDRUTIL -> C 'Contact Mover')
  - b. Document must be from Epic
  - c. Must be in Results Web application (Not PHSViewer)
- 5. Click on the 'ContactMover' button



6. A new window will appear, click on the 'Select Target Patient' button

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- 7. A popup will appear on the screen where the user will type in the SITE MRN and the SITE is default to the sending site of the document. Once the MRN number is filled out, click on 'Select Patient' button.
  - a. Clicking Close will bring you back to the contact mover page

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8. The target patient information is now displayed on the page, if this is not the correct target patient please click on the 'Select Target Patient' button again to choose a different patient.

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- Once you confirm that the target patient is correct, click on the 'Move Document' button.
   a. Clicking Cancel will close out of the contact mover page.

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10. A popup warning message will appear asking you to confirm this action. Click OKa. Clicking Cancel will not make any changes and will bring you back to the Contact Mover page.

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#### 11. A popup message will appear letting the user know that the move in in process.

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12. Once the document has been moved another popup will appear confirming that the document has been moved successfully.

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13. Click on 'OK' to the popup and then click on the 'Submit' button to refresh the data on the page.

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15. The document will now display in the Retracted Documents page for that chart



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16. Next go to the target patients chart to confirm that the document was moved

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