



Download Documents

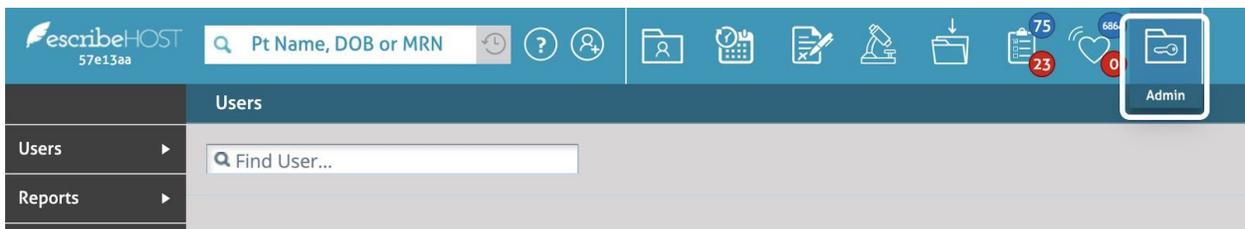
## Download Documents

### Introduction

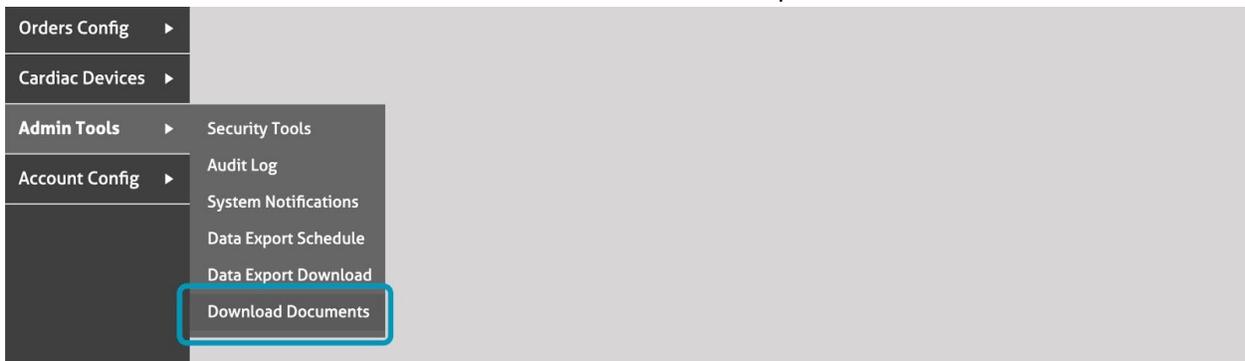
**Download Documents** is a new feature that allows users to generate a zip file with PDF copies of documents for a given date of service (DOS), using search filters to select the desired documents. Download all documents of a given Document Type or Document Class for a single DOS.

This training document presents a step-by-step process to download documents.

Go to the **Admin module** from the top navigation bar.



Select **Download Documents** from the **Admin Tools** dropdown menu on the left.



**Fill in the required fields** for the PDFs you wish to download. You must enter a DOS, a Zip Password, and either Document Class or Document Type.

The screenshot shows the 'Download Documents' interface. The left sidebar contains navigation items: Users, Reports, Providers, Tasks, MQ Admin, Scheduling, Orders Config, Cardiac Devices, Admin Tools, and Account Config. The main form area is titled 'Download Documents' and contains the following fields:

- Date Of Service: \* (Calendar icon) 07/03/2020
- Status: \* (Signed, Expedited, Completed, In Progress checkboxes)
- Data Type: (All Data Types dropdown)
- Document Class: \*\* (All Classes dropdown)
- or
- Document Type: \*\* (Office Note dropdown)
- Provider: (All Providers dropdown)
- Location: (All Locations dropdown)
- Zip Password: \*
- Download Format: \* (Combine Documents into as few PDFs as possible (up to 100 pages per PDF) dropdown)

A 'Generate' button is located below the form. A legend at the bottom states: '\* Required' and '\*\* Must choose either Type or Class, but not both'.

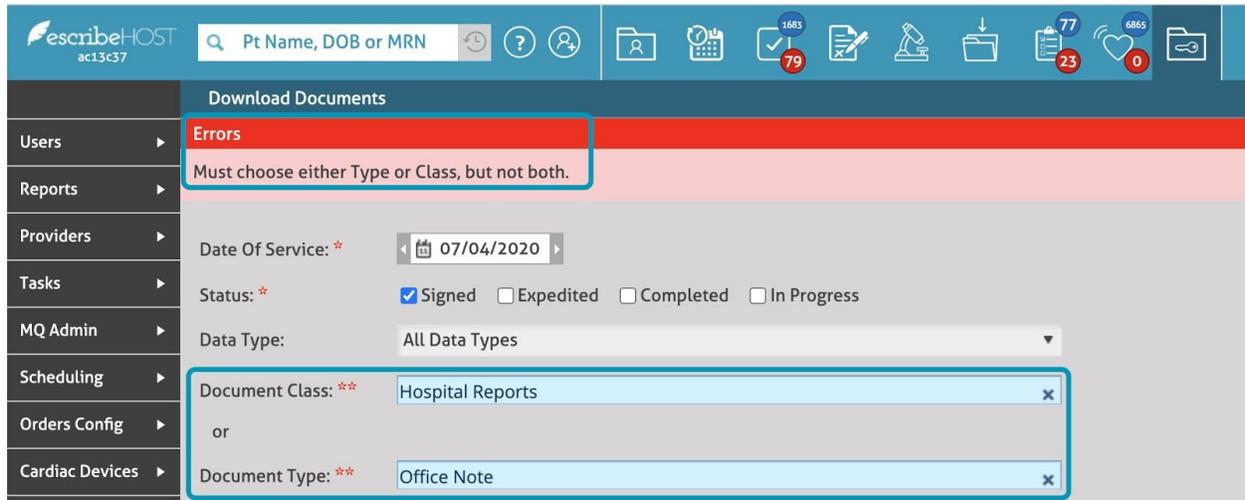
The **Zip Password** field is mandatory. This password will be necessary to unzip the file.

This close-up view shows the 'Zip Password: \*' field, which is a text input box. It is highlighted with a blue border. The 'Download Format' dropdown is visible below it, set to 'Combine Documents into as few PDFs as possible (up to 100 pages per PDF)'.

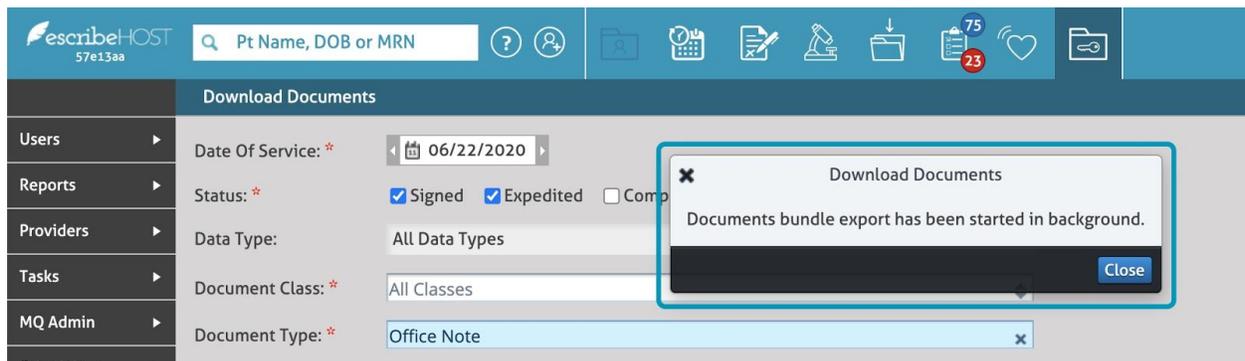
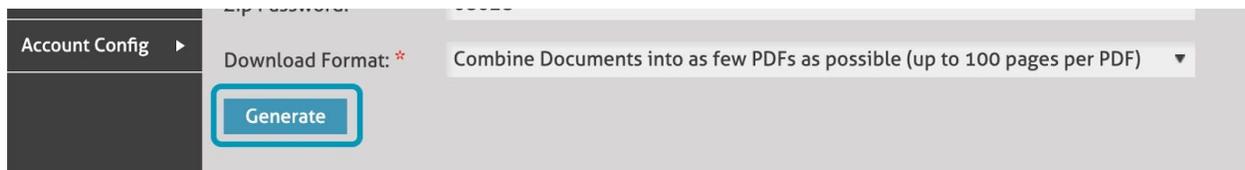
By default, the zip file will contain one or more large PDFs combining multiple documents together. If you prefer one PDF per document, you can change the Download Format.

This close-up view shows the 'Download Format: \*' dropdown menu. The current selection is 'Combine Documents into as few PDFs as possible (up to 100 pages per PDF)'. The 'One PDF per Document' option is highlighted with a blue background. A 'Generate' button is visible below the dropdown.

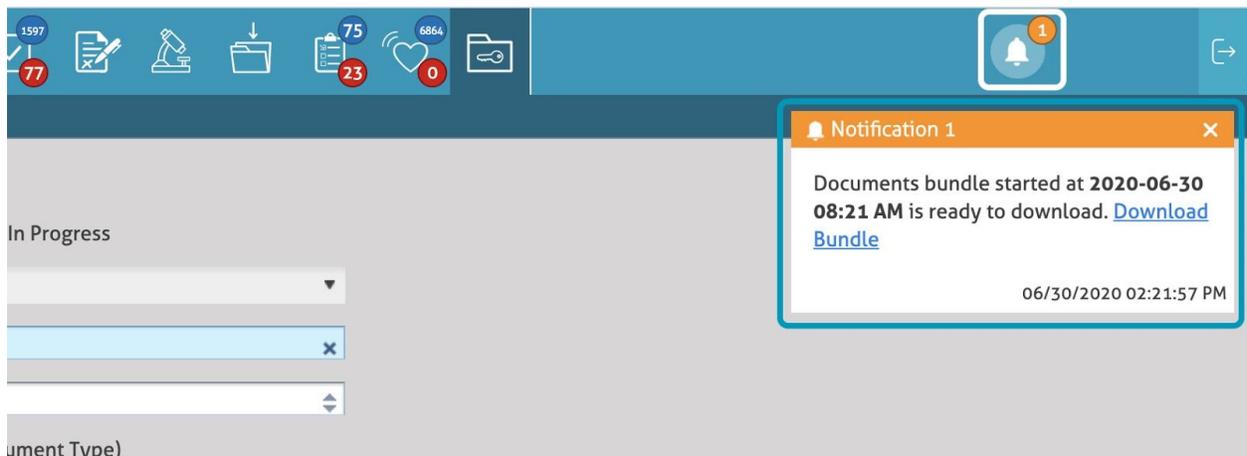
NOTE: You cannot filter by both Document Class and Type.



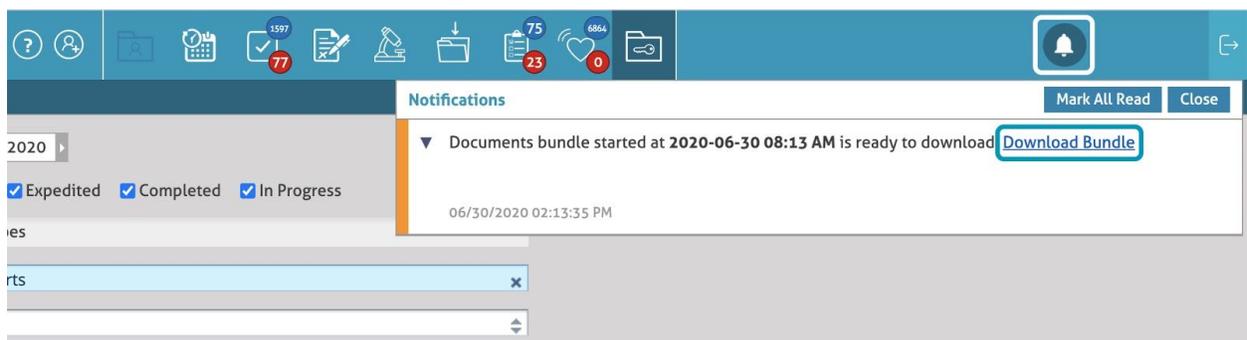
Click the **Generate** button to create the zip file. This process can potentially take a long time, so it is performed in the background. You can continue using the system until the zip file is ready.



When your documents bundle is ready to download, a notification will display on the top right corner. Click **Download Bundle** to start your download.



You can also **click** your **Notifications** and download your document at any point in time.



If there are no documents meeting your criteria, a notification will display.

