

Telus PSS Tip Sheet

With dr2dr, only minimal workflow changes are required to your daily routine of sending and receiving referrals, consults, and advice. The process is very similar to what you currently use for importing and exporting documents for fax or mail.

Exporting Patient Data for Attachment to a dr2dr Conversation

In PSS, click **File**

1. Click **Export to PDF**
2. From the **Select PDF Export Attachments** box, select **patient profile** and any other elements of the patient chart to include in the PDF (referral, consult, etc.)
3. Click **Export**
4. In dr2dr, click **Add Attachment**  in the message to attach the exported PDF file
5. Delete the exported documents from your desktop when done to ensure the security of patient data and to minimize the possibility of attaching the wrong document to future dr2dr conversations

Importing dr2dr Conversations and Attachments

1. Open the conversation in dr2dr
2. Click **Download Attachment**  to save the file to your computer
3. Click **Print**  in the conversation and change the destination to Save as PDF
4. Save the file to your desktop
5. Importing:
 - a. Import Option A:
 - i. Open the patient chart in PSS and create a new encounter note
 - ii. Navigate to the folder where the exported documents are stored and drag and drop the files into the note
 - iii. Delete the imported documents from your computer to ensure the security of patient data and minimize the risk of misfiling information
 - b. Import Option B:
 - i. Open the records file in PSS
 - ii. Click **File**
 - iii. Click **Manage Received Documents**
 - iv. Navigate to the folder where the document is stored and attach the file
 - v. Categorize the document
 - vi. Delete the imported documents from your computer to ensure the security of patient data and minimize the risk of misfiling information