

PointClickCare®

Creating a Cliniconex Storage Category



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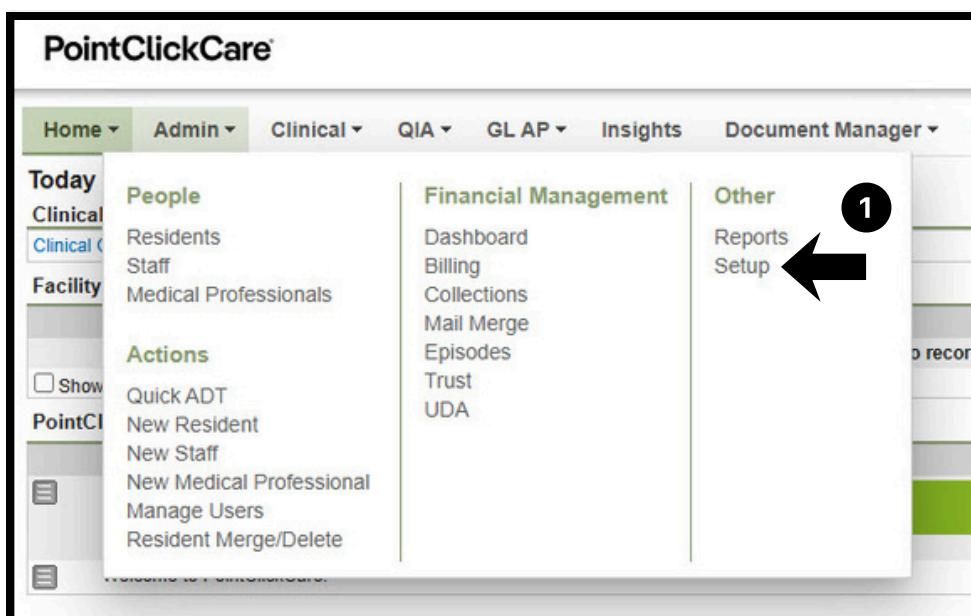
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To store communication logs, you must create a Cliniconex storage category in Admin settings. Without it, historical communications and messages cannot be accessed. The storage category ensures all communication data is retained and retrievable for compliance and reference.

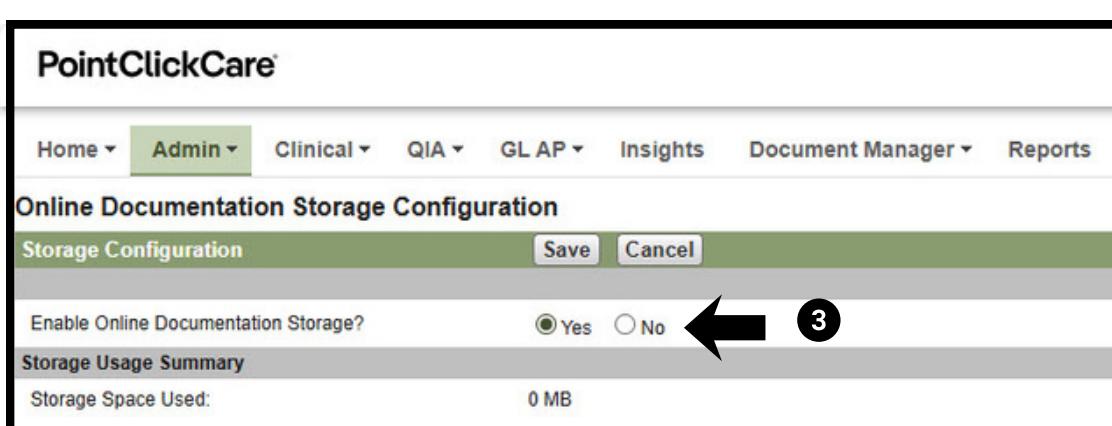
ENABLE ONLINE DOCUMENTATION STORAGE

Before creating a documentation storage category for Cliniconex, ensure that online documentation storage is enabled for every facility that uses Cliniconex.

1. Navigate to **Admin/Billing > Setup**.



2. Select **Online Documentation Storage Configuration** under **Organization Setup**.
3. Select Yes for **Enable Online Document Storage** and **Save**.



CREATE A NEW STORAGE CATEGORY FOR CLINICONEX

After enabling online storage documentation, create a storage category for Cliniconex.

1. Navigate to:

Multi-Facility: Enterprise Management Console (EMC) > Standards > Financial Management

Single Facility: Admin/Billing > Setup

2. Select **Online Documentation Storage Categories** under **Organization Setup**.

3. Select **New**.

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Home ▾ Dashboards ▾ Reporting ▾ Standards ▾ Operations ▾

Online Documentation Storage Categories

All | Corporate | Line of Business | State | Facility

Sort By: Description Scope Order

Categories	
	Description
edit del	ADMISSION DOCUMENTS
edit	Advance Care Planning (system)
edit	Advance Directives (system)

4. Enter **Cliniconex** into the description. This must be exact spelling.

5. Select **Admin** and **Clinical**. Do not select any other options.

6. Click **Save**.

New Online Documentation Storage Category

Description: 4

Order:

This category and associated documentation will be displayed in:

Admin Clinical IRM CRM Admin Collections

Scope: Corporate

Line of Business / State

Line of Business:

State:

Facility:

Save 5 **Save & New** **Cancel** 6

Note: If the documentation storage category for Cliniconex is created at the EMC level, it will be listed for **all** facilities, even if Cliniconex is not enabled. However, keep **Corporate** selected for Scope.