

Digital Documents - How do I request a document be digitized?

Wylie will digitize documents for users in order to enable use of the digital documents feature. This feature allows users to fill in documents digitally within Wylie. Users also have the capability to email documents to clients from within the system to have clients digitally fill in the document at home.

1. When creating your document ensure that you have used the appropriate symbols to indicate to Wylie which fields you would like placed where on your document.

_____ indicates a text box. _____ preceded by the word 'signature' indicates signature field.

indicates a check box.

2. To request digitization of a document by Wylie, email the request with the document attached to info@wyliesystems.ca

- Acceptable document formats include PDF, Word, and Google docs.
- Documents must be in their final draft, as Wylie will only provide digitization after the document has been created. There will be an extra charge for any editing beyond adding digital fields.

3. When emailing document digitization requests please use the following format in the body of your email to indicate to Wylie what name you would like for each document within Wylie as well as the subject of the email being sent to the client.

EXAMPLE:

•File Name: Wylie_Patient Intake Form•Document Name (in Wylie): Patient Intake

•Document Email Subject (when emailing document to client): Wylie Systems –PatientIntake Form

•Document requires second signature: Yes or No *this indicates whether the document requires being signed by someone such as a doctor after initial creation by a staff member.

*Note: All documents added or edited by Wylie are subject to applicable fees depending on the scope of the work required.

Requesting a Change to an Existing Digital Document

1. Log into Wylie, select the ‘Tools’ icon to the top left and choose the ‘Documents & Templates’ option from the dropdown. Select the ‘View all Documents’ option from the pop up, then select the ‘Document Templates’ tab from the top of the page.

2. Select the magnifying glass beside the document you wish to edit. Then, select ‘Download’ to the bottom right. Find the downloaded PDF in your download files on your computer.

You can often do this by selecting the up arrow beside the document that just downloaded to the bottom of your screen, then selecting ‘show in folder’. Select the document to open it in Adobe. A key aspect of requesting a document change is that the document needs to retain all digitization initially added by Wylie. This is why it is important to keep the document in PDF format.

3. Make any desired changes. If your desired changes require additional fields to be added by Wylie, please use red text to indicate to Wylie where the new fields need to be added. Also include in your email to Wylie “requested fields

indicated in red”

*(Only change text to red when change requires Wylie to add new fields), along with the name of the document and file name.

EXAMPLE:

File Name: Wylie_Patient Intake Form

Document Name (in Wylie): Patient Intake

Document requires second signature: Yes or No *this indicates whether the document requires being signed by someone such as a doctor after initial creation by a staff member. requested fields indicated in red When requesting additional digitization ensure that you are using the appropriate symbols to indicate to Wylie which fields you would like placed where on your document.

_____ indicates a text box. _____ preceded by the word ‘signature’ indicates signature field.

indicates a check box.

4. Email all document change requests to info@wyliesystems.ca

*Note: All documents added or edited by Wylie are subject to applicable fees depending on the scope of the work required.

Online URL: <https://help.wyliebiz.com/article.php?id=59>