Scan Assistant 2007

A guide to scanning images.

John Deere Medical Group of Waterloo
1015 South Hackett
Waterloo, Iowa 50701
ph. 319-274-1000
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Topic I. Introduction

Scanning documents is vital if you intend to go completely paperless. With that in mind, this manual describes how to utilize your scanner to get the most out of the Practice Partner product.

To begin your journey, it is assumed that you have the following:

- A scanner (Required)
- ACDSee or other imaging software (Required)
- Practice Partner Scan Assistant 2007 (optional)
- Practice Partner (Required)
- Omnipage Pro 14 or higher (Required if OCR is used)
- Macro Express 3.0 or higher (optional, but saves a **lot** of time)

First, we will discuss optical character recognition, which allows you to scan in a typed document directly into the medical record as text. The document must be in plain type and it should not include any graphics or handwriting. OCR is ideal as it doesn't take up much room in the database and it is easily searchable as text. You will find that about seventy percent of your documents will be able to be scanned in this manner. There are just two programs involved with this process: Practice Partner and Omnipage Pro 14 or greater. OCR is beyond the scope of this manual.

The second type of scanning, which is actual document imaging, requires a bit more on the front end in terms of workflow, but it is easily manageable using the provided instructions and tools. There are three programs that are needed to carry out the document imaging process: ACDSee (or another image scanning software package), Scan Assistant, and Practice Partner. Images are scanned, named and placed on the server with Scan Assistant, and then linked to via Practice Partner as part of a progress note using a function called PLINK2.

Your goal should be to receive as much as you can electronically to minimize the need to image the documents. Imaging is a little more involved and it does take up more disk space than typed text, but it is often the only way to get certain types of documents in the system.

Topic II. Scanning and Linking Images

Introduction to Scanning Images

The following document addresses how to scan in images that cannot be easily OCR'd into the Practice Partner medical records software. Many of these documents contain graphics, tables, or handwriting. None of these will OCR very well. To briefly outline the process, the user will be scanning in the documents, running Scan Assistant to rename and move the file to the server and then finally linking the document to a patient chart in Practice Partner using the PLINK function.

Programs Involved:

- Practice Partner
- Scan Assistant
- Macro Express 3.0 (optional but recommended)
- Imaging program to save the scan to TIFF format
- Alternatiff for viewing images on the client machines (optional)

Part I – Sorting the incoming documents

1. Gather all documents to be imaged. This master pile will need to be sorted into a few separate piles. First, sort them into two piles, black and white in one pile, and color in the other. Next, go through each pile and compile documents of like category. The categories may vary according to your needs and Scan Assistant can be customized to meet these needs.

2. Once the documents are sorted into these categories, make sure you then sort the category piles so that you have single page documents and multi-page documents together.
3. Now that you have your documents sorted, they are ready to scan.

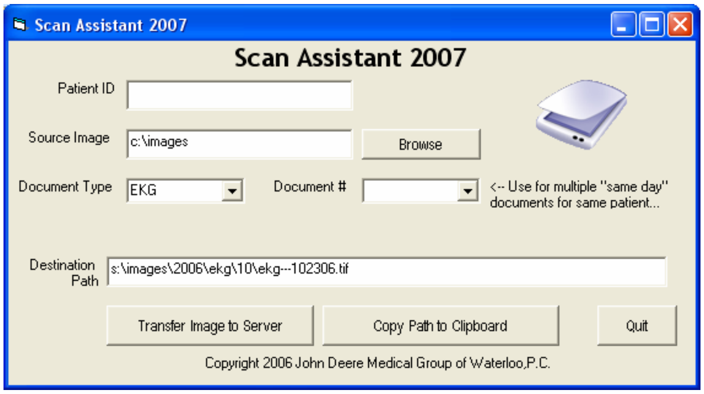
Part II. Scanning

1. To scan these documents, use the imaging software that came with your scanner or any other third party TWAIN compliant scanning software. The important element here is that you need to be able to save the file as a compressed TIFF, PDF, JPG or whatever image type you prefer. TIFF is recommended.
2. Scan the images to a folder on the hard drive. The Scan Assistant program looks in c:\images by default.

Part III – Linking the Scanned Image to the Patient Chart

1. Open Practice Partner

2. Open Scan Assistant, which is on the desktop.
3. Look at the scanned image or original paper document and note the patient's name.
4. In Practice Partner, look up the patient and note the ID. You can actually just write it on the original document to make it easier on yourself.
5. Switch to Scan Assistant.



6. Type in the patient ID.
7. Click B**rowse** and select the image file you scanned to c:\images
8. Choose the document type from the drop down list.
9. If there are multiple documents of the same type being scanned on the same day, use the document# dropdown to differentiate the filename.
10. On your screen, notice how the destination path now reflects the patient id, document type, and date.
11. Next, click the "Copy Path to Clipboard" button.
12. When you are sure this screen is correct, click **Transfer Image to Server**. This copies the file to the network server from the scanning machine's hard drive.
13. Open the chart and go to the proper tab for the document.
14. Create a new note. It is recommended that you make a note template to handle scanning. A sample named ASCANNING has been provided below:
    Providers: «REQ»

    Click the link below to view the original document.
15. Go to Insert, Template and choose ASCANNING **OR (if you have Macro Express)** Hit CTRL-A on the keyboard to invoke the macro to do this for you.
16. Put in a date and title. The date should be the visit date on the document. The title should consist of PROVIDER: LOCATION: SPECIALTY (i.e. Kabel:CVMS:Cardiology)
17. Put in a provider code, (i.e. GLH) in the line that read .PV:<REQ>
18. Put your cursor below the text "Click the below..."
19. Go to Insert, Quick Text, Go to Dot Codes, Choose PLINK **OR** Hit CTRL-Z on the keyboard to have a macro do this for you.
20. In the address line, put your cursor there and hit **CTRL V** on the keyboard. This will paste the path to the file in the field.
21. In the subject line, put the title of the note, i.e. EKG Results
22. Save the note. **Test the link** to make sure the right document comes up.
23. Repeat the process for each scanned page.

Concluding Notes

- OCR as much as possible. Image the rest.
- Do not forget to add .PV: to the notes so they go to the proper provider.
- The links appear as hyperlinks in the progress note. The provider will simply click on the link just like a web link and the image will appear in the PMSI browser. The provider then signs off the progress note and not the actual document.
- It is HIGHLY recommended that you purchase a copy of Macro Express to create the progress note and insert the PLINK quicktext for you. It saves a ton of time!!! http://www.macroexpress.com
- It is HIGHLY recommended that you use Alternatiff to allow viewing in the PMSI Browser. http://www.alternatiff.com

If you would like a video demonstration on using the product, please visit http://www.jdmg.com/scan-assistant.html