

Chart Preparation & Scan Training Agenda




<p>Practice Name: _____</p> <hr/> <p>Phone# _____</p> <hr/> <p>Fax# _____</p> <hr/> <p>E-mail _____</p> <hr/> <p>Date: _____ Trainer: _____</p>	<p>Team Members: Responsibilities:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%; height: 20px;"></td><td style="width: 50%;"></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td></tr> </table>												
<p><input type="checkbox"/> Retain Scanned Documents</p> <p>Retain Scanned Documents – simplifyMD recommends that items, files, and records that have been scanned into your Digital Chart Room should be kept for no less than 60-90 days before disposal</p>	<p>Notes:</p> <hr/> <hr/> <hr/>												
<p><input type="checkbox"/> Backup your data</p> <p>The drives should be labeled in some meaningful fashion (such as backup 1, backup 2)</p> <ul style="list-style-type: none"> ➤ Only one backup drive should be connected to the appliance at a time. The other should be stored offsite or in a locked, fireproof safe ➤ The backup drive that is in use should be connected to the appliance via included USB cable and to the UPS unit via the included power cable ➤ The appliance backs up the system files and database nightly at 1:00 A.M. local time. The external USB drives should be swapped every morning, every other morning, or at an interval the practice is comfortable with 	<div style="text-align: center;">  </div> <div style="text-align: center; margin-top: 20px;">  </div>												
<p><input type="checkbox"/> Barcode cover sheets</p> <p>Barcode cover sheets are used to direct the documents under them into the correct patient's chart and/or tab within the patient's chart</p> <p>Barcode cover sheets can be found in 3 places throughout The Digital Chart Room:</p>													

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<p>The Face Sheet Patient Finder Schedule Page</p>	<p>Notes:</p> <hr/> <hr/> <hr/> <hr/>
<p><input type="checkbox"/> Printing barcode cover sheets</p> <ul style="list-style-type: none"> ➤ Once you've accessed the barcode cover sheet area, select the cover sheets you'll need for the chart you are scanning <ul style="list-style-type: none"> ✓ "Select All" if you'd like to print one for each tab OR ✓ Click the box next to the individual tab cover sheet you desire ➤ Press print ➤ Select the printer you wish to print from 	
<p><input type="checkbox"/> Basic Scanning</p> <ul style="list-style-type: none"> ➤ Place the Barcode Cover Sheets on top of each chart section Set the documents on the scanner top down & face down ➤ Click the Filing Center tab within The Digital Chart Room Select how you wish to scan from the filing center functions drop down (upper right-hand corner of screen) <ul style="list-style-type: none"> Default Scan is for single-sided black & white documents only Custom Scan is for color or double-sided documents ➤ Scan in sections of no more than 50 pages at a time Put scanned items back into chart Mark chart as scanned Keep scanned documents a minimum of 30-60 days 	 <p>Notes:</p> <hr/>

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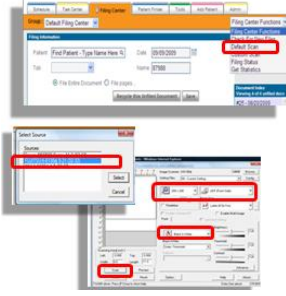
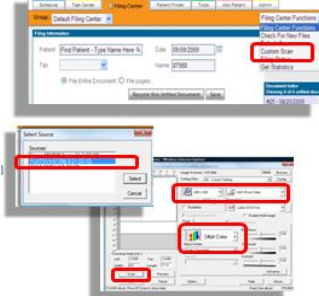
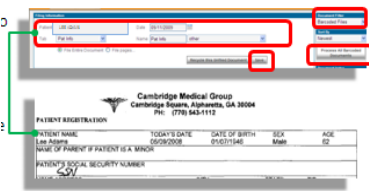
<p>Default Scan Settings</p> <ul style="list-style-type: none"> ➤ Select “Default Scan” when you are scanning single-sided black & white documents ➤ Your scanner settings associated with default include: <ul style="list-style-type: none"> ✓ 200x200 Resolution ✓ ADF Front Side ✓ Black & White ➤ A document scanned by choosing “Default Scan” will average in size between 35 & 90KB but may be larger depending on the # of pages scanned 	 <p>Notes:</p> <hr/> <hr/> <hr/>
<p>Custom Scan Settings</p> <ul style="list-style-type: none"> ➤ Select “Custom Scan” when you are scanning color documents or double-sided documents ➤ Your scanner settings once “Custom Scan” is selected are not pre-set so it is up to the person scanning to select them ➤ For Color Documents: <ul style="list-style-type: none"> ✓ Scan no more than 3 pages per document ✓ Select 200x200 resolution ✓ Select 24 Bit Color ✓ Select ADF Front Side ➤ Recommend you always confirm the file size of a custom scan 	 <p>Notes:</p> <hr/> <hr/> <hr/>
<p>The Document Tab Scan Results</p> <ul style="list-style-type: none"> ➤ It will take a minute or so for documents you scan to appear in the filing center ➤ Because of the barcode cover sheet, you'll notice all filing center information is pre-populated! ➤ Click “save” to file each document scanned separately ➤ Select “Barcoded Files” from the document filter and click “Process All Barcoded 	 <p>Notes:</p> <hr/> <hr/> <hr/>

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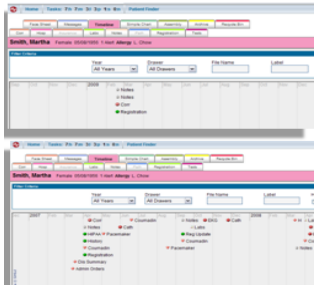
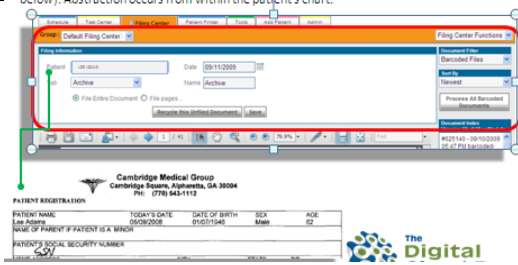
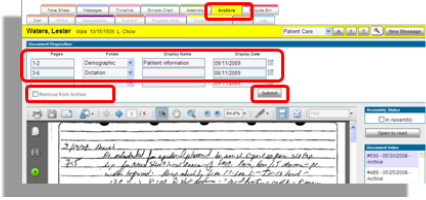
<p>Documents” to file all at once.</p>	<hr/> <hr/>
<p>Re-Date</p> <ul style="list-style-type: none"> ➤ THE CHOICE IS YOURS and largely depends on how you and your physician(s) wish to view the chart in your Digital Chart Room <ul style="list-style-type: none"> • If you elect NOT to re-date, then you will still be able to view the date of service when viewing the document in the viewing pane of the chart, however using the timeline or the document index by date becomes obsolete. • If you do elect to re-date, it is a little more work on the front end, but you will be able to utilize both the timeline and document index to their full functionality from the beginning. 	<p>Timeline NOT re-dated vs. a re-dated one</p>  <p>Notes:</p> <hr/> <hr/> <hr/>
<p>Scanning to the archive tab</p> <ul style="list-style-type: none"> ➤ Scanning to the archive system tab is a quick way to get everything scanned into the system per patient: <ul style="list-style-type: none"> ➤ Printing off one barcode ➤ Only re-organizing chart into “like items” if you wish ➤ Staff will need to abstract items from archive into the correct tab within the patient’s chart ➤ The scanned document will come into the filing center, information pre-populated (shown below). Abstraction occurs from within the patient’s chart. 	<p>Security: Abstraction occurs from within the patient’s chart.</p>  <p>Notes:</p> <hr/> <hr/> <hr/> <hr/>

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<p>Abstracting from Archive</p> <ul style="list-style-type: none"> ➤ Navigate to the patient's chart & click on the yellow archive tab ➤ Using the document description area, input the page numbers of the document in the viewing pane, which tab, a display name, and a display date which you want to abstract from archive and click "submit" ➤ You have the option to remove these items from archive when you click submit. 	 <p>Notes:</p> <hr/> <hr/>
<p>Scanner maintenance</p> <ul style="list-style-type: none"> ➤ Clean the scanner parts regularly ➤ See the scanner product guide for instructions 	<p>Notes:</p> <hr/> <hr/> <hr/>

General Scanning Tips

- Make a scanning plan that's right for your practice.
- Set scanning policies & stick to them! Decide if you are scanning to archive or not, re-dating, or not, and where scanned charts will be filed. Also, decide where items that need to be scanned into already scanned charts will be placed to scan before re-filed.
- Keep in mind that the # of pages you put in the scanner per chart section will result in a document of the same # of pages. If re-dating, each page could potentially need a new date.
- If the scanner is connected to one person's computer, perhaps create a scanning assembly line in which one person preps the chart and prints barcodes, then another scans.
- Don't forget to mark the charts that have been scanned!
- Monitor those scanning charts until they have a comfort level with the scan process. Perhaps have employees initial the cover of the charts that they have scanned.
- Remember that once you've scanned in the chart, it is in! You will never have to pull that paper chart again!

Technical Support

- Support is available Mon-Fri 8:00am – 8:00pm EDT via phone 678-578-6187
- 24/7 via email
 - support@simplifymd.com
- Check online & simplifyMD University for regular updates
 - www.simplifymd.com
- Use your login name & password to access simplifyMD University



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Disclaimer: The success of this training agenda is based on the office allowing dedicated time for the training to be completed. The office is responsible for training the staff not participating in this training session.

I acknowledge the Additional Chart Prep & Scan training has been completed:

Practice Name

Name: (Printed)

Signature

Date

Please fax back to: 678-578-6177

