



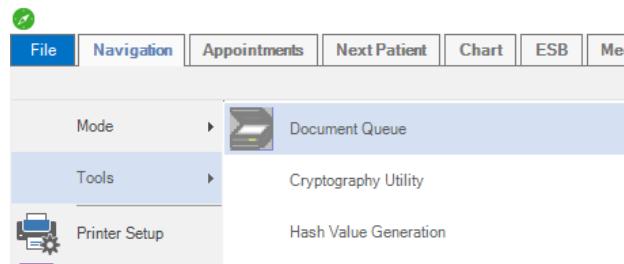
SuccessEHS Scanning Procedure

Outlines the proper process for scanning and attaching documents in the SuccessEHS system

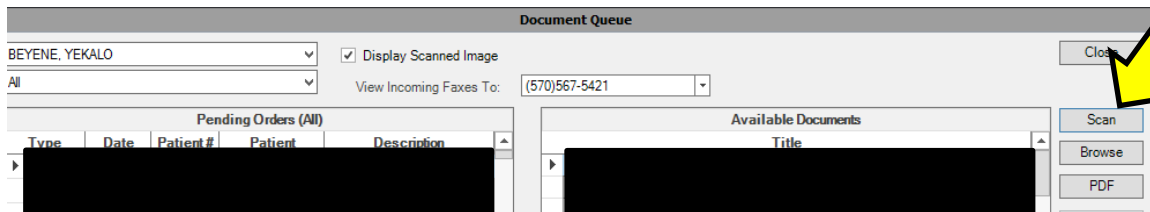
Documents that need to be scanned are separated into specific “category” boxes and must be scanned accordingly. Please keep in mind that the **Provider** category boxes supersede any other category and must be done first. Each box must be completed in its entirety before moving on to the next one.

Scanning

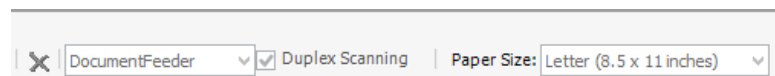
1. In order to expedite the scanning process, separate the documents into like page groupings (i.e. – all 1 page together, all 3 page together, etc.). When scanning ROI's/Consents group them in packets of 25
2. Open the **Clinical Console** Module
3. Click on **File** in the top menu ribbon, then choose **Tools → Document Queue**



4. Once in the **Document Queue**, select **Scan**

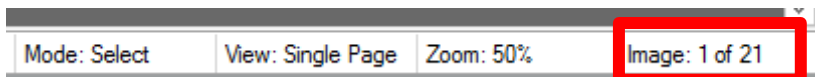


5. The scan window will open. Ensure that the scanner settings in the **Top Menu Ribbon** are set to DocumentFeeder, Duplex Scanning is Checked, and Paper Size is Letter (8.5 x 11 inches)



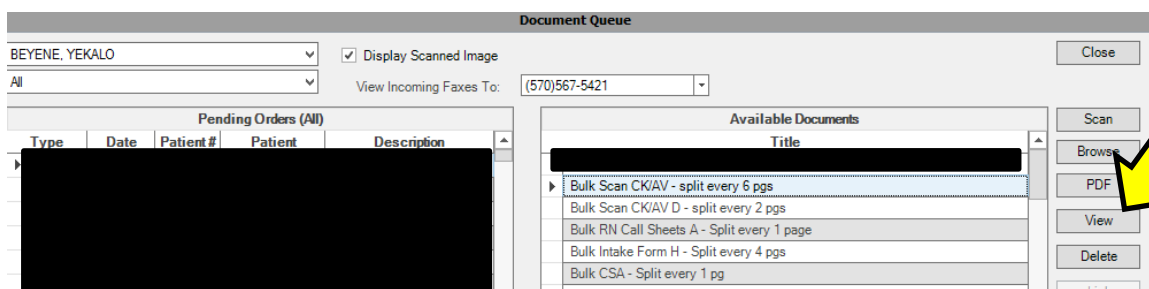
6. After verifying settings, place documents appropriately in the scanner document feeder and press the **Scan** icon. *Note: If there are more documents for the group than will fit in the document feeder, you can scan a portion of the documents and once the feeder is empty add more into the feeder and simply press the **Scan** icon again*

- Once documents are scanned, **Save** the group utilizing the following naming convention: **Bulk Scan Provider Initials - Split every __ Pgs** (i.e. – group of documents for Dr. Kaiser that are 3 pages must be labeled – Bulk Scan RK – Split every 3 pgs). When scanning ROI's/Consents use the naming configuration Bulk **ROI ALPHA LETTER – Split every __ Pgs (These should be scanned no more than 25 per group and use alpha system when naming)** (i.e. - **Before saving it is critical to verify the number of pages in the bottom right corner is divisible by the number of pages you are marking to split by. If the page numbers do not divide out correctly, then you need to re-verify the split number before saving**

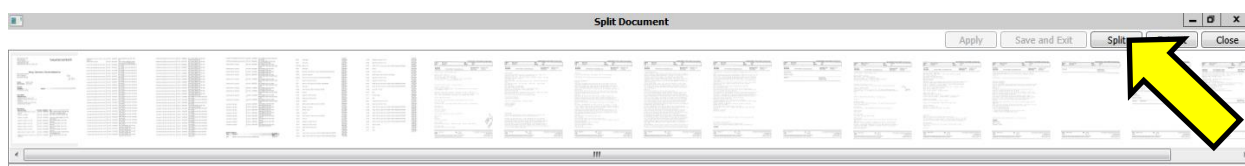


Attaching

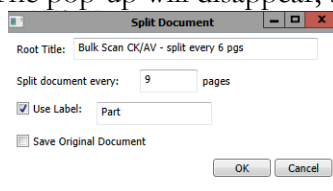
- Before proceeding with the below steps on attaching documents to a patient's chart, be sure to review the naming convention outline at the end of this document.
- When ready to attach documents, work in the order that the documents are layered in the document queue. Complete each grouping of split documents before moving on to the next split group.
- Inside the **Document Queue**, click on **Title** to sort the list then highlight the document group under **Available Documents** that needs split and select **View**. When opening the document be sure to note the "split every #" so that you can properly split the document



- Once the image loads from the database, select **Edit → Split** from the top menu ribbon
- The **Split Document** window will open and you will need to select **Split** in the upper right-hand corner of the window



- In the **Split Document** pop-up, you will need to key the correct **Split document every: _____ pages** in order to properly split the document. It is critical to make sure the **Save Original Document** box is **unchecked**. Once entered, select **OK**. The pop-up will disappear, select **Save and Exit**



7. Close the original document and you will be taken back to the document queue. You should then be able to locate your document. It will have the same label with a **Part 1, Part 2, etc.** at the end of the title
8. View each document and save according to the naming convention outlined below.
9. If the document could potentially have an **Order** to attach to (i.e. – Consults, Labs, Radiology, etc.) then you must look up the patient's information using the **Pending Orders** section in the **Document Queue** before attaching to the patient's chart. Search out the **Ordering Provider** using the drop down menu in the top left corner of the **Document Queue**, then search for the patient and look for the order. Should you find the correct order, select the order from the **Pending Orders** side and also select the document from the **Available Documents** side of the **Document Queue** and then select **Link**. This will link the result to the order that is in the patient's chart and send it to the Provider under the **Orders to Sign Off** tab
10. If there is no order or the document simply would not have an order (i.e. – a physical form, prescription, etc.) then you will select the document from the **Available Documents** section and choose **Misc. Index**. Search for the patient and select **OK**. The **Create Misc Index Images** window will appear, choose the appropriate **Selected Misc Index Folder** from the drop-down menu and then **Save**. This will place the document in the patient's chart

Naming Convention

- All documents must be labeled as follows:
 - **Document Title – Patient First and Last Name – Provider Initials**
 - For example: Old Records – Sam Zztest – RK
 - *Note: If the provider name is not on the document, you must look up the PCP in **patient administration***
- If the document contains labs, radiology, pathology you must spell out what tests were completed
 - For example: CBC, Lipid, TSH – Sam Zztest – RK
- ER reports should state the date of the ER visit in the Title