Scanning Basics:

1. Diagnostic Tests – ex/ lab work, x-rays, OAE, UA etc.
Type of Item: Diagnostic Test
Category: <u>TYPE IN</u> what kind of test it is
Ex/ CBC, CMP, Lead, EBV, OAE, UA, Urine Culture, etc.

2. Patient Chart
Type of Item: New Patient
Category:

- Patient Registration   - New Patient Questionnaire

- HIPAA Privacy Statement   - Release of Medical Record

Type of Item: Insurance
Category:
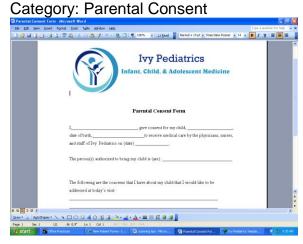- Financial Policy   - Easy Pay Consent Form

3. Insurance Cards
Type of Item: Insurance
Category: ID Card

4. Photo ID
Type of Item: Patient Misc.
Category: Parent ID

5. Parental Consent Form
Type of Item: New Patient
Category: Parental Consent

6. Referral Authorizations
Type of Item: Patient Misc.
Category: Insurance Authoriz

7. Letters from Patient Allowing another Person to Bring Patient
Type of Item: Patient Misc.
Category: Consent to Bring PT
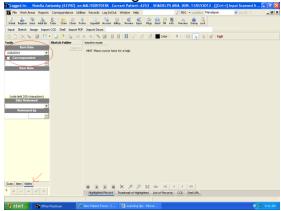
8. Developmental Questionnaires
Type of Item: Chart
Category: TYPE IN name of questionnaire
Ex/ ASQ- 30 Month, Postnatal Depression Scale, KADS-6

9. Letters from other Doctors
Type of Item: Referral Letter
Category: TYPE IN what kind of doctor the letter is from
Ex/ ENT, Ophthalmology, Orthopedic, Urology, etc.

10. Charts from other Practices
- Organize the chart by separating diagnostic tests, referral letters, chart notes, growth charts, and immunization records.
- Scan the diagnostic tests like you usually would <u>BUT</u> change the date!
- To change the date, click the notes tab on the bottom. At the top you will see "Item Date". Change the date to reflect when the test was performed.
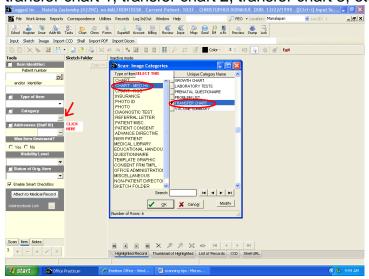

- Scan the referral letters like you usually would <u>BUT</u> change the date!
- For the chart notes:
Type of Item: Chart
Category: Transfer Chart
* Click the three dots after category. On the left hand side menu select CHART-MED Hx. On the right hand side select Transfer Chart.
* Do NOT put too many pages in the transfer chart. If there is a lot of papers create multiple "transfer charts". Input about 10 pages at a time and label each transfer chart 1, transfer chart 2, transfer chart 3, etc.

- For the growth charts:

Type of Item: Chart

Category: Growth Charts

* Follow the directions on how to input a transfer chart but instead select growth charts.

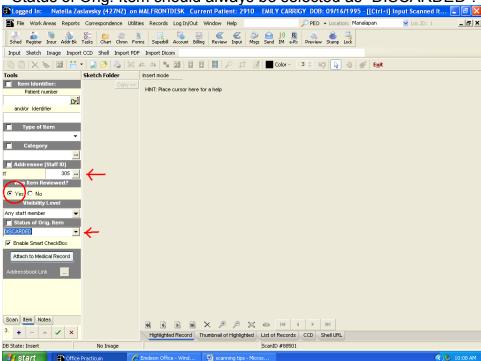* It is ok to put all the growth charts together.

- For the immunization records:
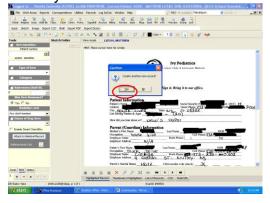
Type of Item: Chart

Category: Vaccine Summary

* Follow the directions on how to input a transfer chart but instead select vaccine summary.
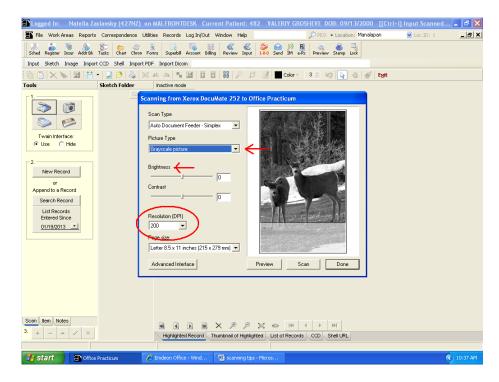
Extra Tips:

- Addressee should always be selected as Dr. Trogan.

- Make sure to click "YES" under item is reviewed.

- Status of Orig. Item should always be selected as "DISCARDED".

- When the system asks if you want to create a new item – hit yes!

- Change the brightness when scanning colored paper.
- When scanning credit cards, photo IDs, etc change to grayscale picture.
- Make sure resolution is always selected as 150 dpi or higher.

BEFORE SHREDDING SCANNED DOCUMENTS, ANOTHER MA NEEDS TO VERIFY THAT THE SCANNED DOCUMENTS WERE SCANNED IN THE RIGHT CHART, UNDER THE RIGHT SECTION AND THAT IT IS READABLE. ONCE YOU SHRED THE DOCUMENTS OR MISFILE THEM UNDER A WRONG PATIENT, THEY ARE GONE FOREVER!