Introduction

The Electronic File Management application allows files to be attached to patient accounts. These files may be scanned, copied from a PC, copied from the server or taken from the documents that are set up to be digitally signed. Changes may be made to the files once they are attached to an account. Files can be deleted, re-titled or moved from one patient account to another.

Electronic File Management

Hardware

The document scanning feature is used for scanning documents and items such as driver's licenses, insurance cards and other miscellaneous documents. In order for a scanner to properly communicate with the CPSI System it must be TWAIN compliant and the TWAIN drivers installed on the PC to which the scanner is attached.

The ability to perform scans across the network is also available. In order for this option to work the scan must be originated from the PC and not the scanner. Please contact CPSI Technical Applications for further information on this configuration.

Setup

The Electronic File Management application is a separately purchased software application. Prior to implementation, certain table maintenance must be performed.

AHIS, Page 9

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **AHIS** > **Page 9**

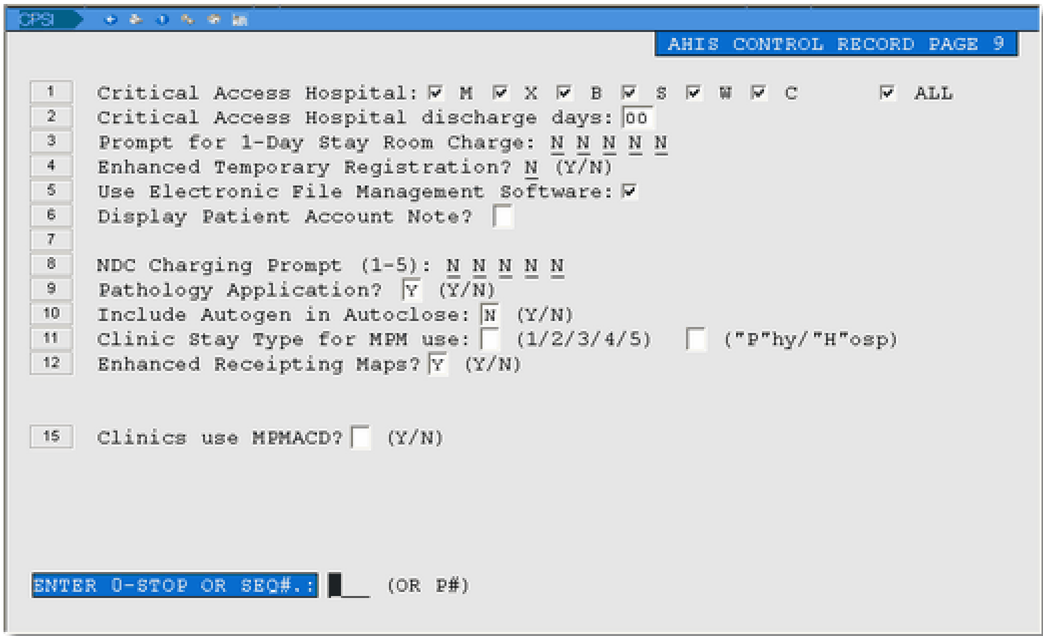


Figure 1.1 AHIS Control Record, Page 9

- **Use Electronic File Management Software:** To begin using Electronic File Management, this field will need to be selected. The system will prompt "Purchased Function, Please Contact Your CPSI Marketing Representative." CPSI will activate this option after it has been purchased.

Special Functions

Employee Sign On is necessary in order to use Electronic File Management. There are two employee security switches that will need to be reviewed.

Select **Special Functions module** > **System Management** > **System Security** > **Employee Security** > **Page 2**

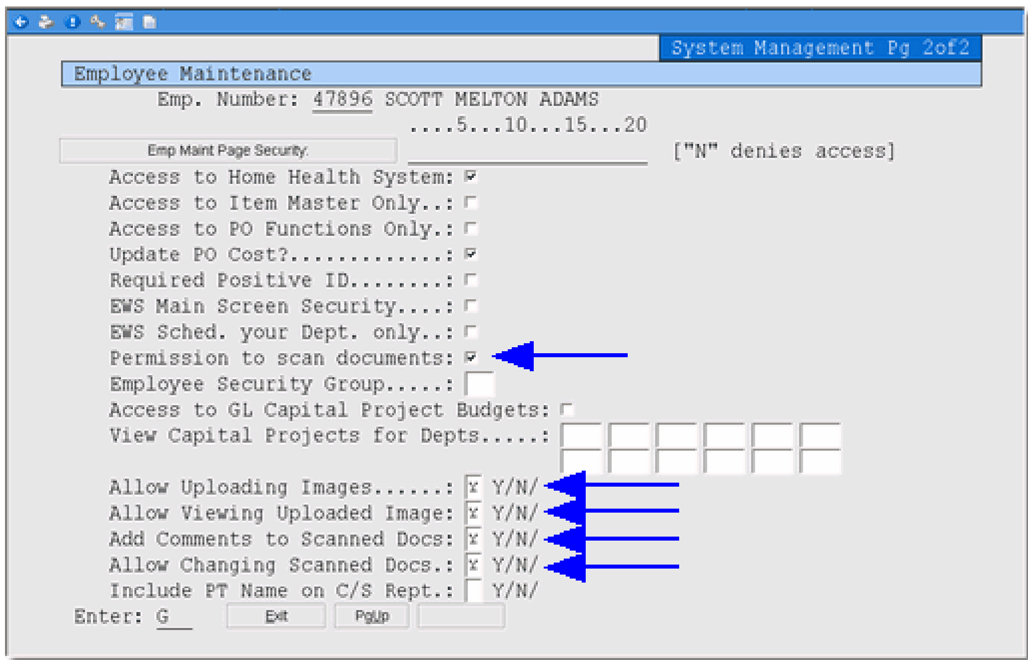


Figure 1.2 System Management, Page 2

- **Permission to Scan Documents:** If selected, this option will allow the employee to scan documents.
- **Allow Uploading Images:** If set to **Y**, this option will allow the employee to upload a document from the PC option in Electronic File Management.
- **Allow Viewing Uploaded Image:** If set to **Y**, this option will allow the employee to view a document that was uploaded through the PC option in Electronic File Management.
- **Add Comments to Scanned Docs:** If set to **Y**, this option will allow the employee to add comments to any file attached to an account through the Electronic File Management application.
- **Allow Changing Scanned Docs:** If set to **Y**, this option will allow the employee to move, re-title or delete any file attached to an account through the Electronic File Management application. It will also allow the employee to view deleted or moved files on an account. If set to **N**, the "Deleted" and "All Images" radio buttons will be grayed out and the employee will be unable to view deleted and moved files.

Image Title Table

Prior to utilizing Electronic File Management, information must be entered in the Document Titles and Delete/Move Reasons table. These are found in the Image Title table in the Business Office Tables.

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **Image Titles**

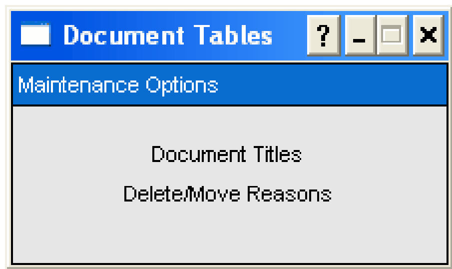


Figure 1.3 Maintenance Options

Set up a document title for each type of document that will be scanned using **New**, located below the Description Index listing.

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **Image Titles** > **Document Titles**

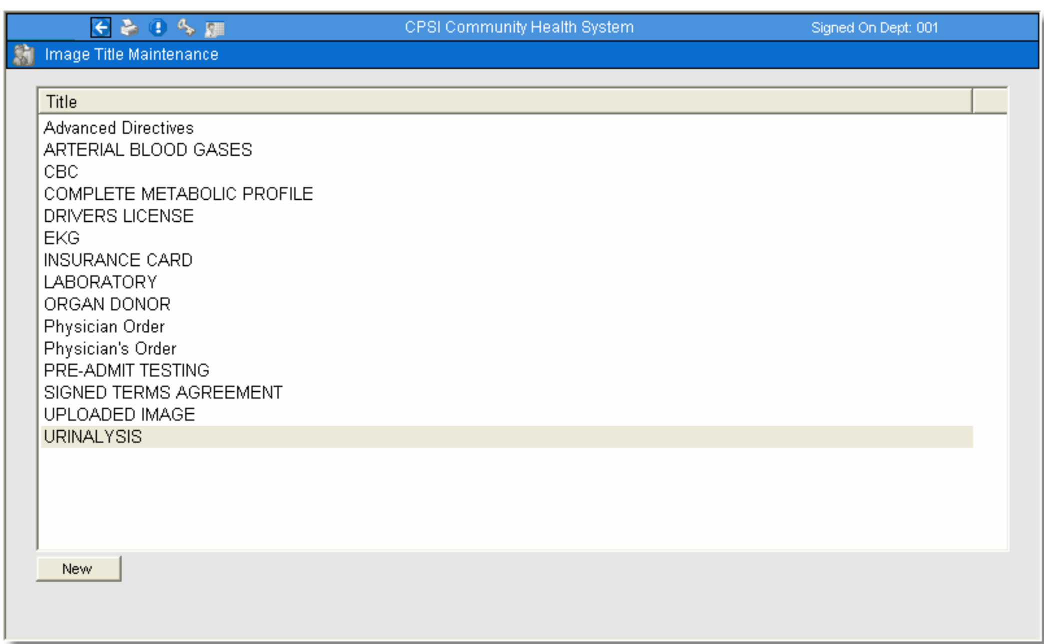


Figure 1.4 Image Title Maintenance

Selecting an existing image title or selecting **New** will display the following screen. This screen will allow new image titles to be created or existing ones to be maintained.

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **Image Titles** > **Document Titles** > **New**

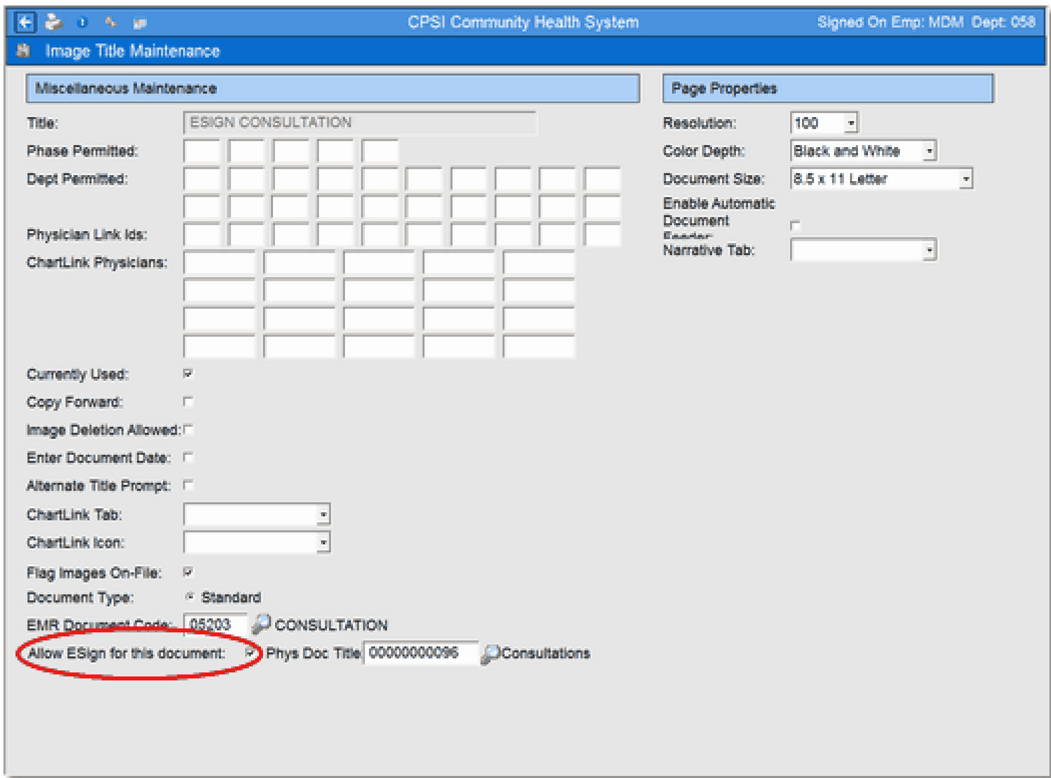


Figure 1.5 Image Title Maintenance

- **Title:** Enter a 30-character description. Once this description has been entered, any changes to the title will not be allowed. In other words, any documents scanned under an original title will remain under that title.

- **Phase Permitted:** Enter the department Phase ID that should have access to the image.

- **Depts Permitted:** If additional departments, that do not share the above-entered Phase ID, should have access to the image, enter those departments in the spaces provided in "Depts Permitted". Up to 20 departments may be entered. If "Phase Permitted" is blank, the system will use the department settings to determine image-viewing capabilities. If both "Phase Permitted" and "Depts Permitted" are blank, any facility employee will have access to the scanned images.

To determine a department's Phase ID, review Departmental Security settings within Special Functions. From the CPSI Clear Direction screen, select **Special Functions**. Access **System Management**. Select **System Security** and **Department Security** settings. When a department number is entered, the Departmental Phase ID will display. Some departments do not require a "Phase

ID" for daily operations.

- **Physician Link IDs:** Selecting this option allows access to scanned images via Medical Practice Access.
- **Chartlink Physicians:** This option allows up to 20 physicians to be entered. Enter the physician number to allow that provider access to that specific Image Title when using the ChartLink Virtual Chart feature to scan images directly into ChartLink. Enter an "*" in the first field to allow all physicians.
- **Currently Used?:** For active image titles, this field should be selected. For those titles that have been discontinued, misspelled or changed, leave this field blank so that no further images may be scanned for this title.
- **Just Like Allowed:** If this field is selected, and a patient is registered using the Just-Like function, then this Image Title, along with the scan from the original account, will copy to the new registration. If this option is blank, no scans from the original account will copy over to the new registration.
- **Image Deletion Allowed:** Select this field to allow the stored image to be deleted. If blank, the stored image may not be deleted.
- **Enter Document Date:** If this field is selected, during the scanning process the system will prompt for a document date. The default will be the current date. The date entered will display next to the Image Title on the patient's account.
- **Alternate Title Prompt:** If this field is selected, during the scanning process the system will prompt for an alternate title. The alternate title will display on the patient's account with an "*" to denote it is not the original title of the image.
- **Chartlink Tab:** This determines which of the 16 ChartLink Tabs the scanned Image Title will display.
- **Chartlink Icon:** This allows an icon to display on the Whiteboard in ChartLink to notify the physician of a new scanned image.
- **Flag Images On-File:** If this field is selected for an Image Title, and the title is associated with a patient's account, the account will be flagged with "Scanned Images On-File".
- **Document Type Standard:** This field will only be used in conjunction with CPScan. Selecting Standard for an Image Title means that document will be scanned into the system.
- **EMR Document Code:** Enter the code from the EMR Document table in the Medical Record Control table.
- **Allow ESign for this document**: Select this option to allow a scanned image to be E-Signed.

For consistent use of space for scanned images, and to better manage the disk space used, page properties will allow optimal default settings to be established for each image title. These settings may be changed during the scanning process if necessary.

- **Resolution:** Select the default Dots per Inch for this image title from the drop-down list.

- **Color Depth:** Select the default scanning color for this image title. Black and White, Grey Scale and Color are the available options.

- **Document Size:** Select the default size for this image title from the drop-down list. The size may be set to Letter, Legal, Index Card or Business Card parameters.

- **Enable Automatic Document Feeder:** Select this field if the scanner used has an automatic document feeder attached.

- **Narrative Tab:** Select the chart tab within the MPEMR Clinical that the scanned image will populate. This is only used for clinic patients.

In addition to the document titles, reason codes will also need to be set up prior to using Electronic File Management. To enter a reason code, access the Delete/Move Reasons section of the Image Titles table. Reason codes will provide an explanation for files being deleted or moved. Selecting **New** will allow the name field to be accessed and the name of a new reason code to be entered. After the name is entered select **Save** to retain the reason code.

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **Image Titles** > **Delete/Move Reasons**

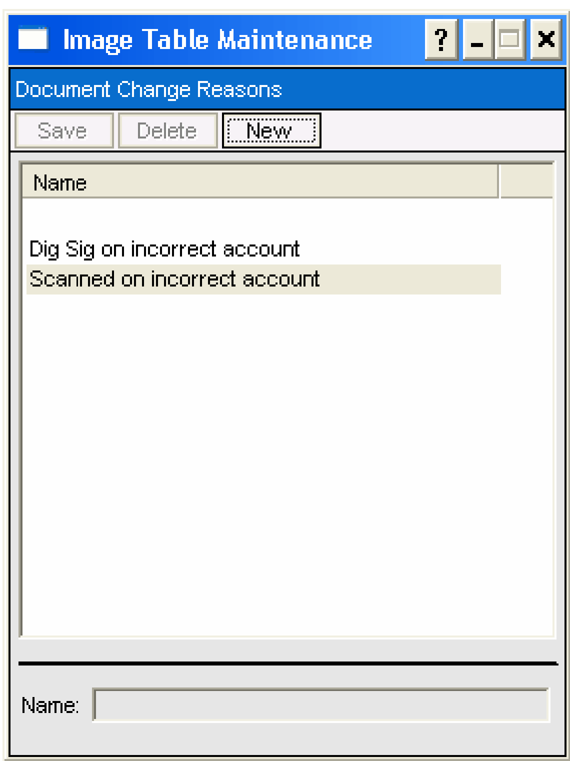


Figure 1.6 Document Change Reasons

To delete a reason code, highlight the reason code, then select **Delete**. This will not delete the reason from an account. It only deletes the code from the table.

Using Electronic File Management

The Electronic File Management application may be accessed from Patient Functions, Census Functions, Medical Records and the Insurance screen.

Select **Hospital Base Menu** > **Patient Account #**

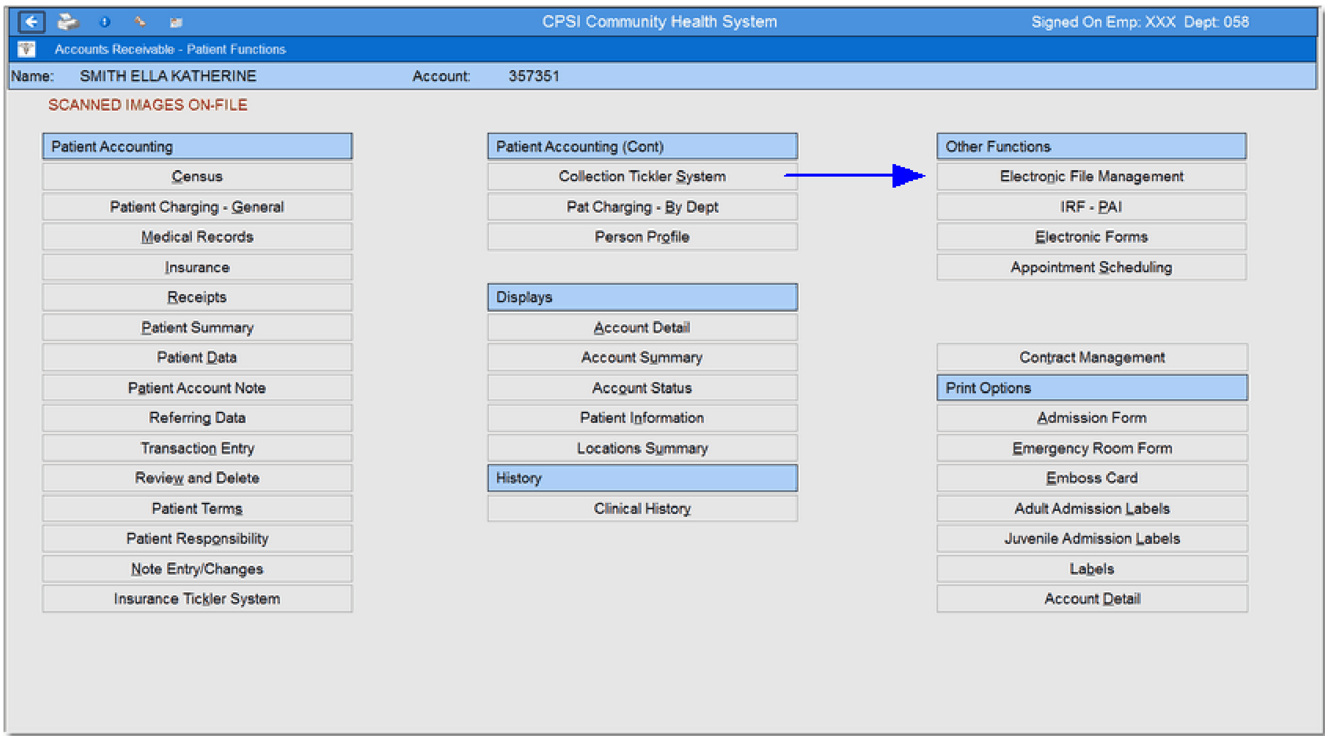


Figure 1.7 Patient Functions

To access Electronic File Maintenance files on an account, select Electronic File Management.

After selecting this option, the following screen will display. The tab File List will display all files linked to the account.

Select **Hospital Base Menu** > **Patient Account #** > **<u>Electronic File Management</u>**

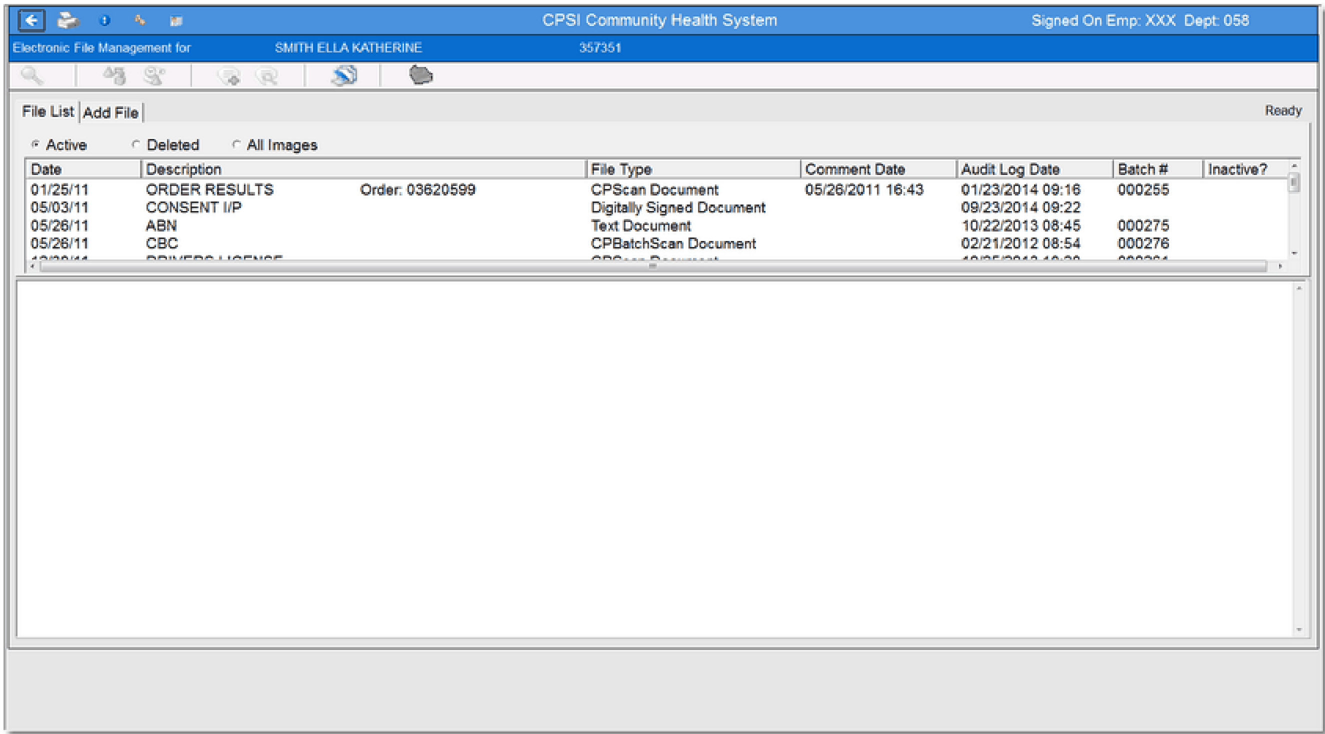


Figure 1.8 Electronic File Management

This display will show the date the file was attached to the account, the description of the file, the type of file that was linked or how the file was placed on the account, date the comment was placed on the file, the audit log date, batch# and if the file is inactive or not. The file will be highlighted in red if it was moved or deleted from the account. In this case, the inactive column will display "Moved" or "Deleted".

There are three viewing options available on the File List tab:

- **Active:** The software will default to this option and will show all files that have not been deleted or moved on the account.
- **Deleted:** This option will only display files that have been deleted or moved on the account.
- **All Images:** This option will display all active, deleted or moved files on the account.

NOTE: *The Deleted and All Images options will only be accessible if "Allow Changing Scanned Docs" is set to **Y** on page 2 of Employee Security. If it is set to **N**, the Deleted and All Images options will display as grayed out on the screen.*

The icons in the top left of the screen are as follows:

-  **View File:** This will allow the file to be displayed on the bottom of the screen as shown below:

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **<u>View File</u>**

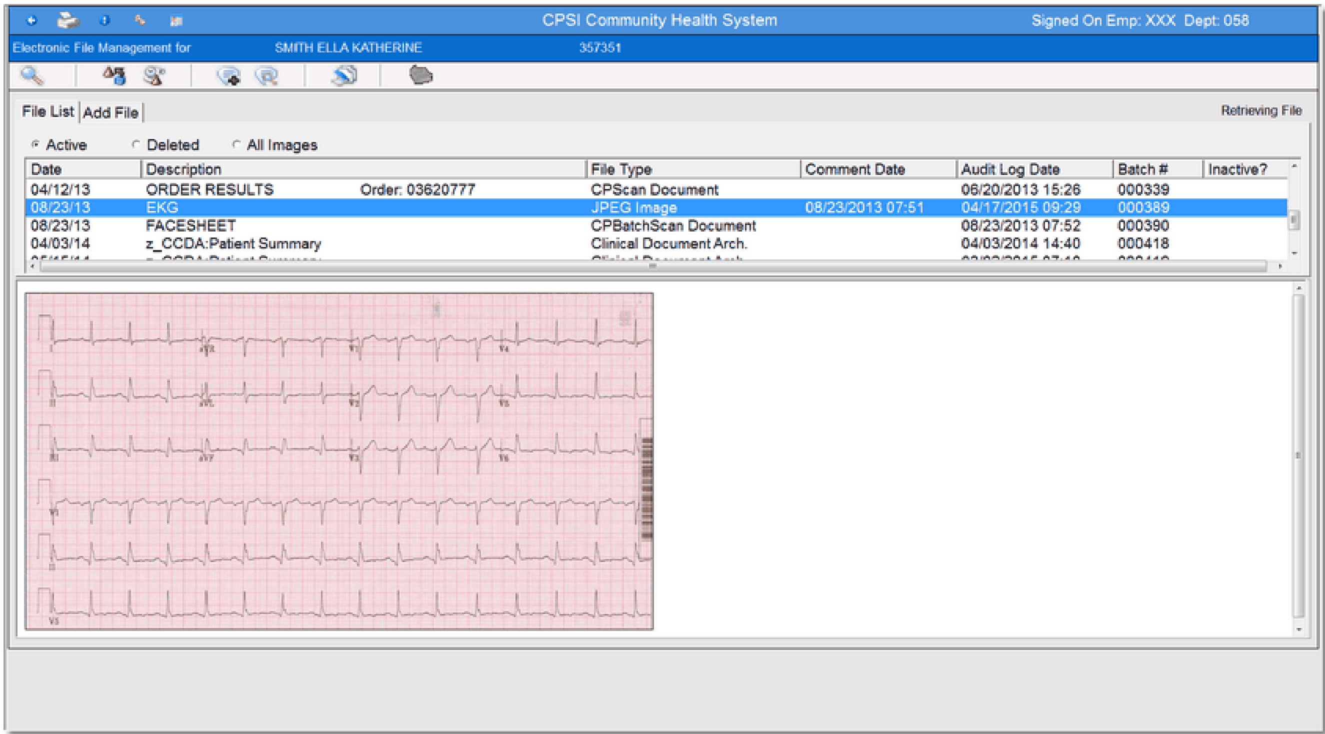


Figure 1.9 Electronic File Management

- **Change File:** This will allow the file to be moved to another account, re-titled or deleted. After selecting Change File, the following screen will appear:

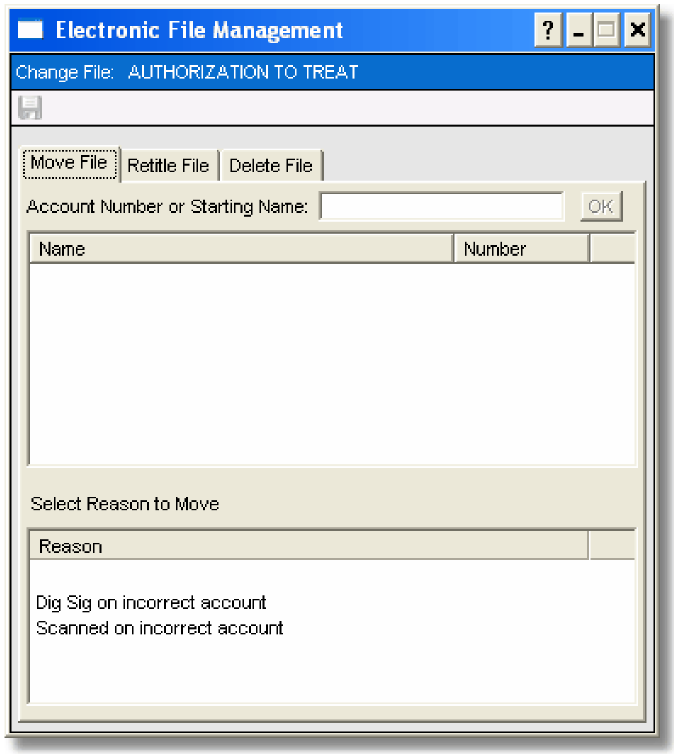


Figure 1.10 Change File

- **Move File:** After selecting the file to be moved, select the Move File tab to transfer the file to a different patient account. Enter the account number or starting name of the account to which the file will be moved. Select **Ok** to display either the account, if an account number was entered or a list of patients in alphabetical order to select an account. When the account receiving the file is displayed, highlight the desired account. Select a reason that best describes why the file is being moved from the Reason lookup. Select **Save** in the top left to transfer the file. The following message will appear. Select **Ok** to complete the transfer or **Cancel** to exit without moving the file.

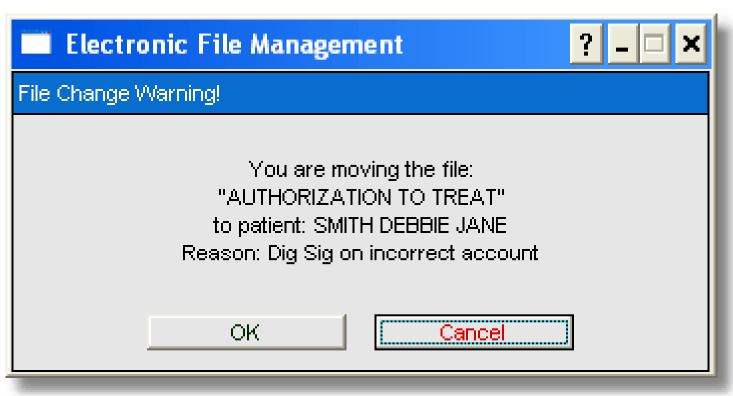


Figure 1.11 File Change Warning

After the file has been moved, it may be viewed from the account it was originally attached. Files transferred from accounts will be flagged by being highlighted in red. The audit log for the file will be updated to reflect the transfer.

- **Retitle File:** Select the file that will have the Image Title given to it at the time it was placed on the account changed. Select the **Retitle File** tab. The Image Titles from the Image Titles table will appear. Highlight the title which will replace the current name of the selected file. Next select **Save** in the top left to change the title of the file. A warning message will appear stating the current name of the file and the new name. Select **Ok** to complete the title change or **Cancel** to exit without changing the file name. The audit log for the file will be updated to reflect the title change.
- **Delete File:** Select the file to be deleted. Select **Delete File**. The Reason Codes from the Image Titles table will appear. Highlight the Reason the selected file will be deleted. Next select **Save** in the top left to delete the file. A warning message will appear stating the name of the file being deleted and the Reason for deletion that was selected. Select **Ok** to delete the file or **Cancel** to exit without deleting the file. After the file has been deleted from an account, it may still be viewed. Deleted files will be flagged by being highlighted in red. The audit log for the file will be updated to reflect the date and time of deletion.

NOTE: *A warning has been added when trying to access deleted images: "The electronic file you selected has been deleted. You have permissions to view this file for historical purposes. Do Not make clinical decisions based on the information in this file and Do Not disseminate this information to others". There is also an "I agree" and "I disagree" radio button that has to be selected.*

NOTE: *Within MP EHR, if a file has been deleted from Electronic File Management the status will display as "Deleted" in the corresponding yellow tab on the patient's narrative.*

- **View Audit Log:** This option will display an audit trail for the highlighted file. This shows the date, time, employee's user login name and action, if any, performed on this file. Shown below is an example of the audit log. Selecting the magnifying glass icon in the top left corner of the screen will display this log in Adobe format.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **View Audit Log**

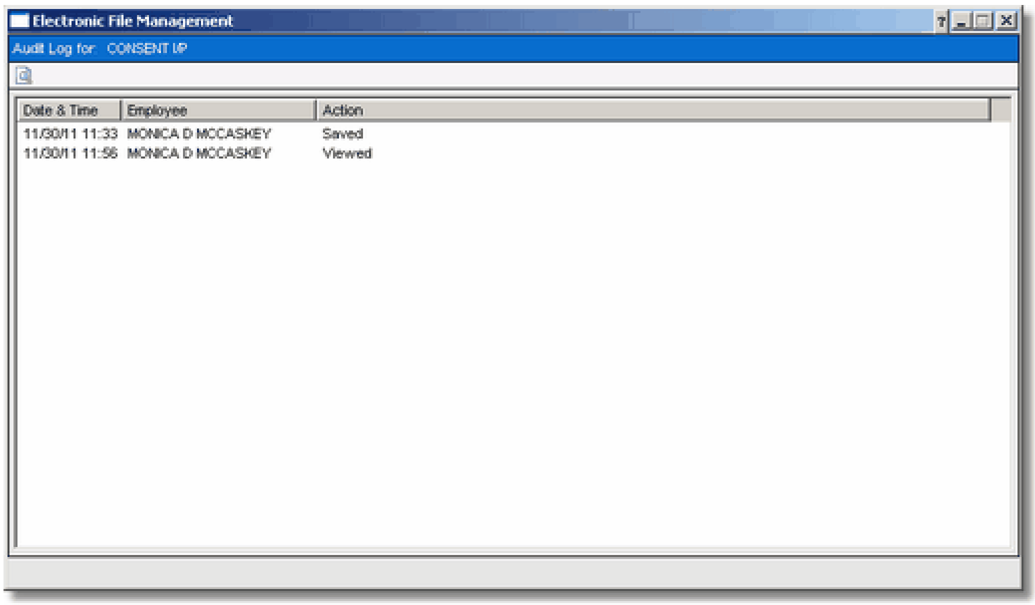


Figure 1.12 Electronic File Management

- **Add Comments:** This option displays existing comments on the account and allows new comments to be entered. Select **Save** after entering the comments.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **<u>Add Comments</u>**

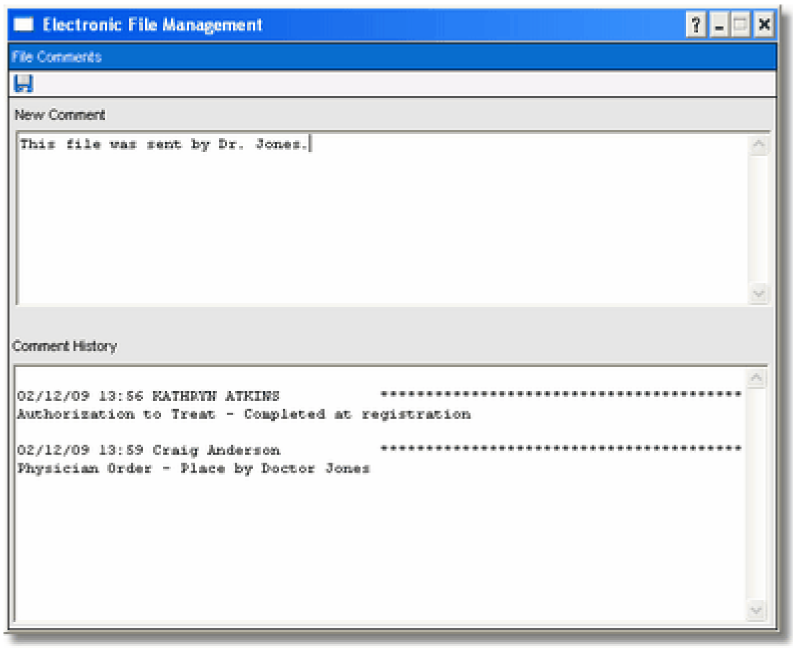


Figure 1.13 File Comments

- **View Comments:** This option displays the comments associated with a file. The date, time and name of the employee who entered the comments will appear if using employee sign on. This is a view only option.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **<u>View Comments</u>**

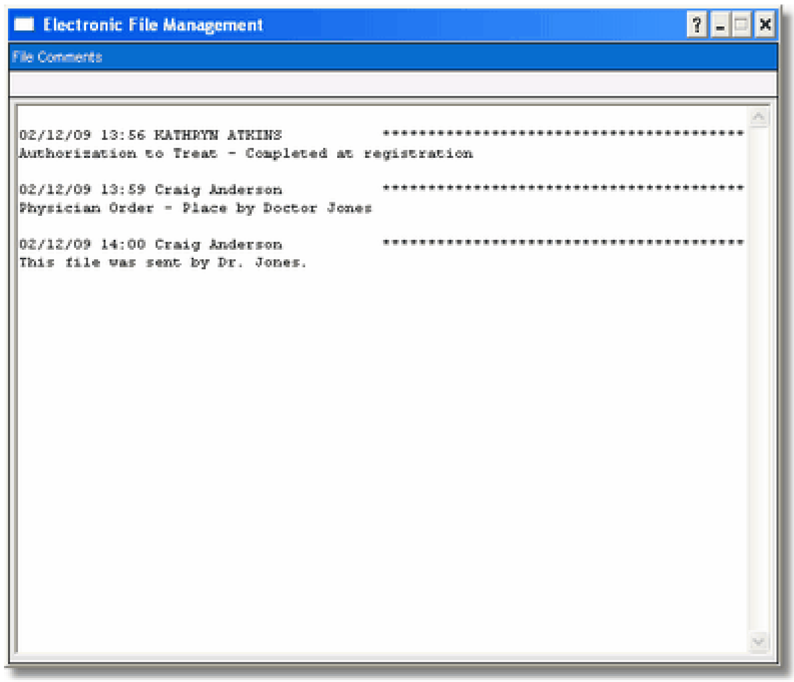


Figure 1.14 File Comments

From the Add File tab, locations in which files may be copied and placed on patient accounts may be selected.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **Add File**

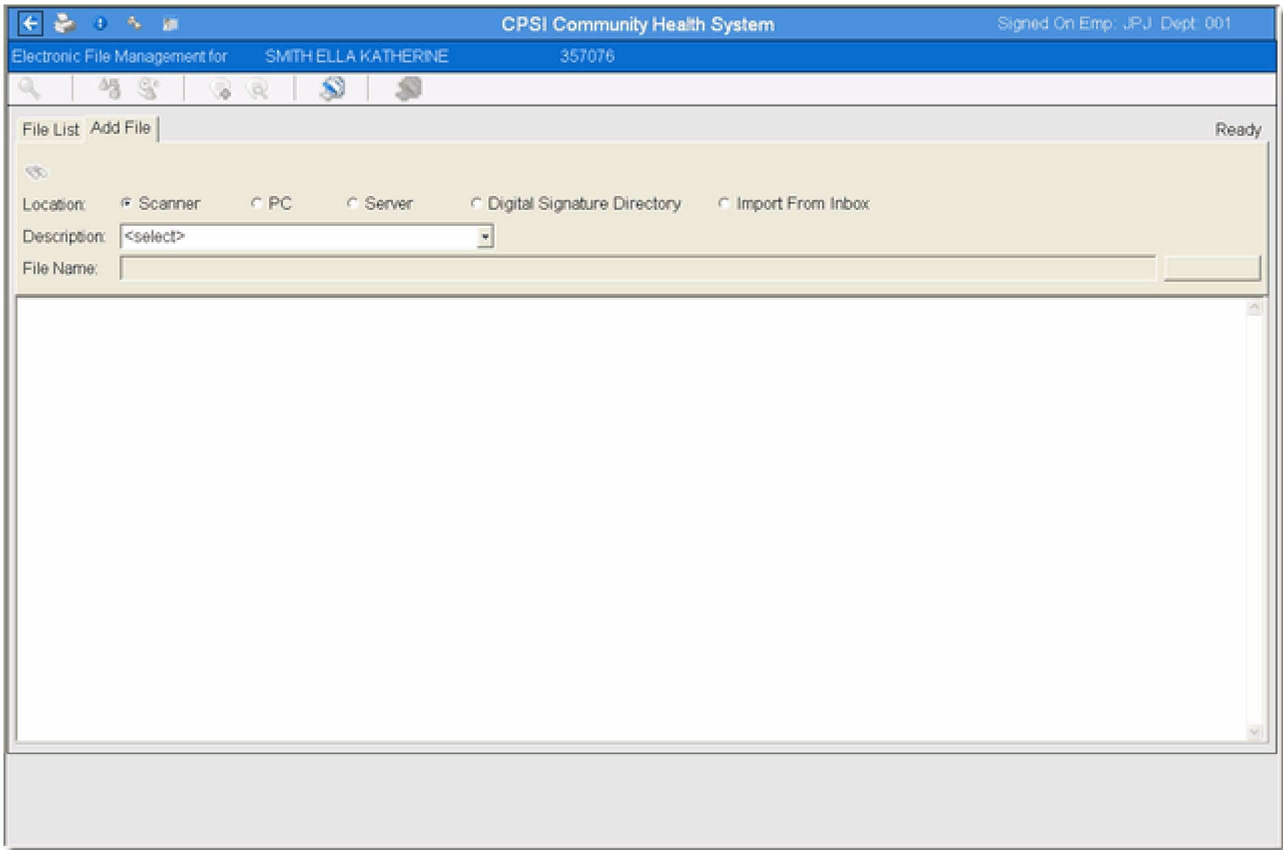


Figure 1.15 Electronic File Management

- **Scanner:** Selecting the Scanner radio button indicates a file will be scanned and attached to a patient's account. This location will allow a description from the Image Titles Table to be selected in order to identify the file once it is on the account.
- **PC:** Selecting the PC radio button indicates a file will be copied from a PC's hard drive and attached to a patient's account. This location will allow a description from the Image Titles Table to be selected. The path of the file name may be entered, or selecting  may be used to search for the selected file.
- **Server:** Selecting the Server radio button indicates a file will be copied from the server and attached to a patient's account. This location will allow a description from the Image Titles table to be selected. The path of the file name will need to be entered. Browsing the server is not permitted.
- **Digital Signature Directory:** Selecting the Digital Signature Directory radio button indicates a file will be copied from the Dig Sig Doc table in the Business Office Tables and attached to a patient's account. This location will allow a description from the Dig Sig Doc Title Table to be

selected.

- **Import From Inbox:** Selecting the Import from Inbox radio button indicates that imported CCDA's from a third party will need to be attached to a patients account. This location will need to have one of the "z_CCDA:..." Image Titles selected. Then select  to view a listing of all imported documents.

Electronic File Management with Digital Signature

When registering a patient, the Admission or Emergency Room Form will be selected from the Registration and ADT screen. If the program XCNPSFOR7A is loaded on AHIS page 2 in the Adm Form Phase field, then the Admission Form will print along with a Consent Form. The Consent Form should then be given to the patient to review, since it is the same document they will be signing digitally.

Select **Hospital Base Menu** > **Account #** > **Electronic File Management** > **Add File** > **Digital Signature Directory** > **Select description**

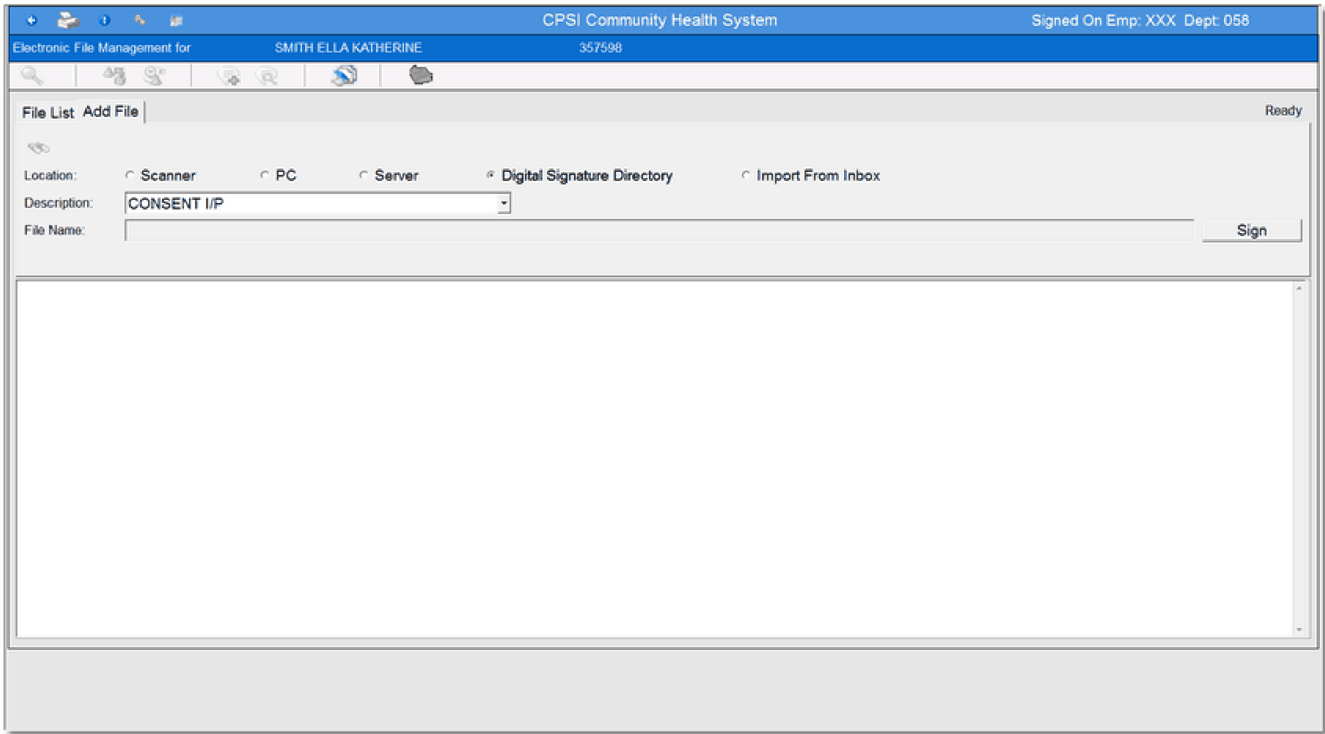


Figure 1.16 Electronic File Management

Selecting the Digital Signature Directory radio button indicates a file will be copied from the Dig Sig Doc Table in the Business Office Tables and attached to a patient's account. This location will allow a description from the Dig Sig Doc Title Table to be selected.

Once a description has been chosen, select **Sign**.

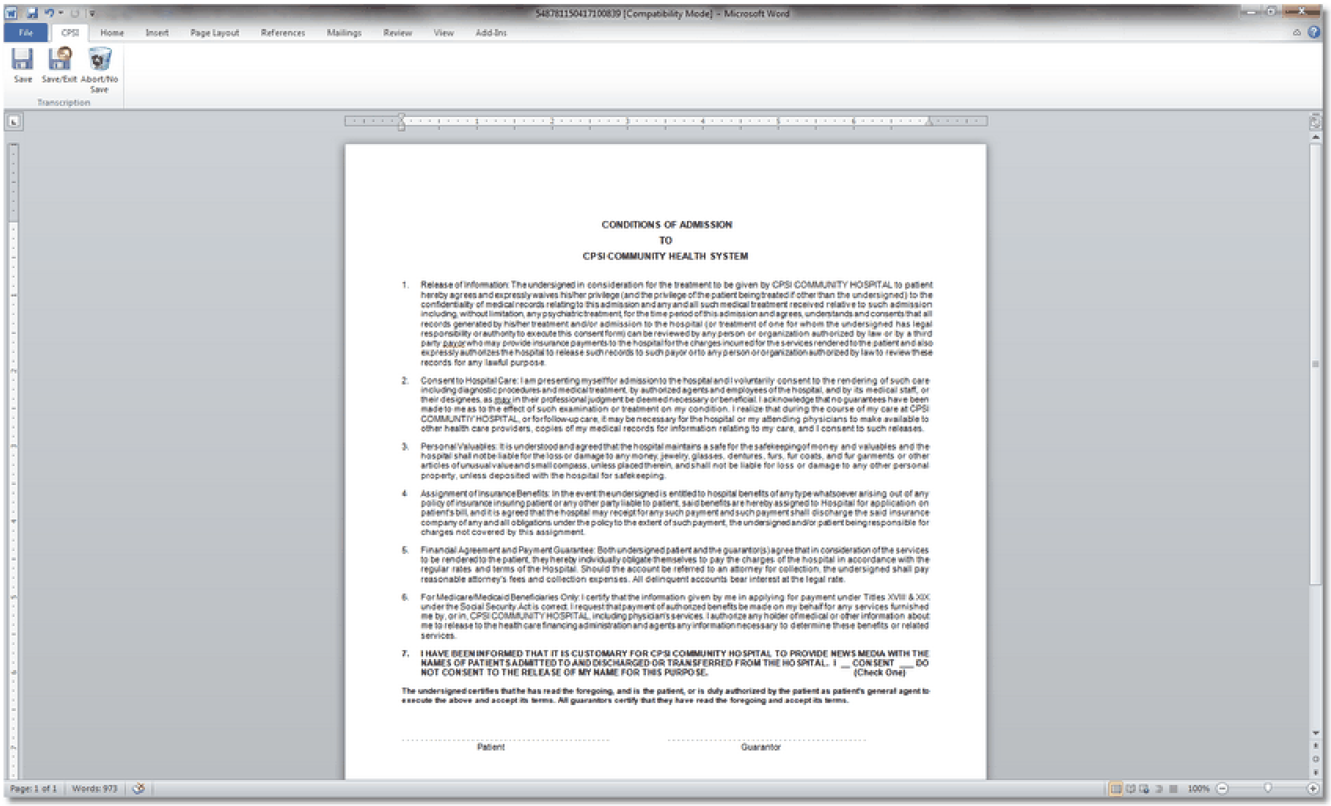


Figure 1.17 Microsoft Word

Stop Codes have been placed in the generic consent documents. By selecting F11, the cursor will go directly to the place in the document where signatures should be captured. After selecting F11, the brackets will be highlighted. At this point, press the Right Arrow key to move one position to the right of the brackets. At this point, the signature may be captured.

NOTE: *To set up a Stop Code within a document, place the cursor in the desired positions and press Ctrl F9. When the document is accessed after this setup, entering F11 will move the cursor to the previously designated positions.*

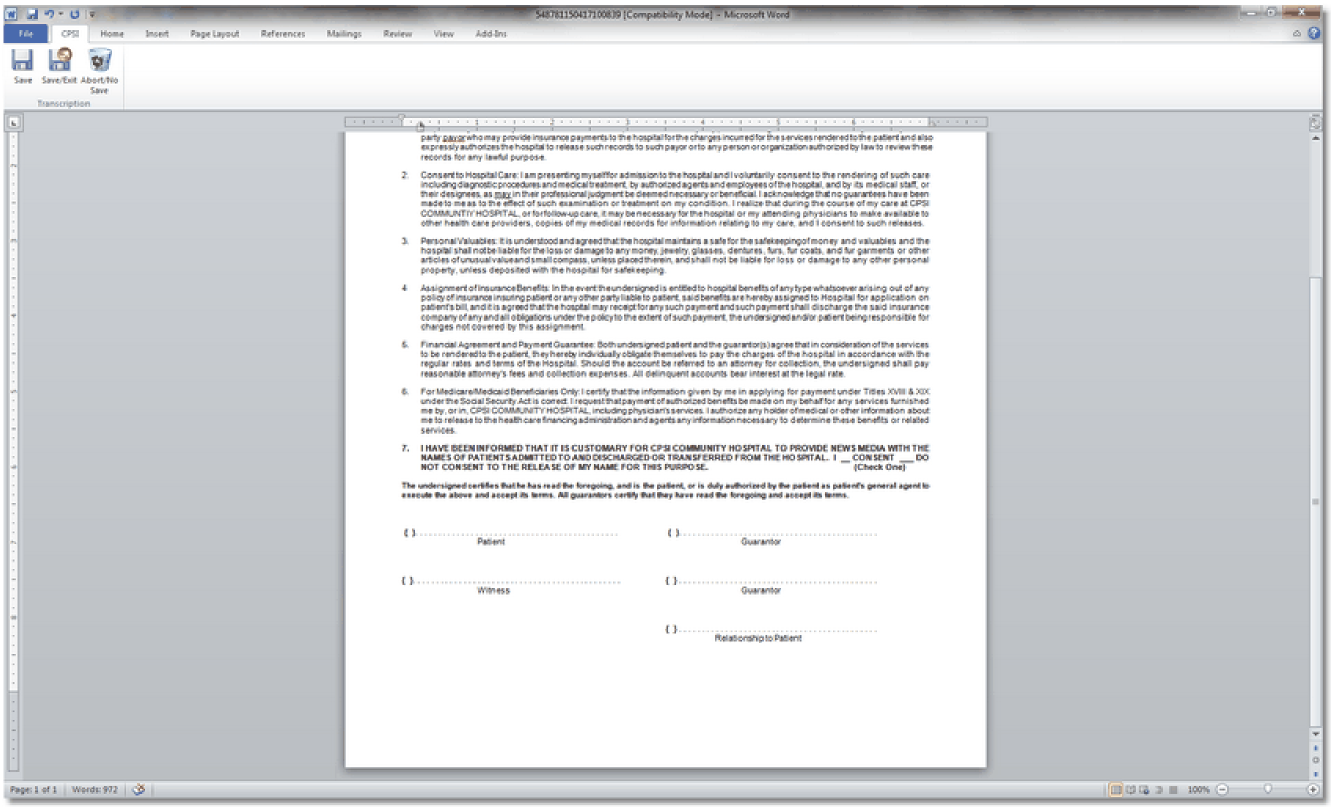


Figure 1.18 Microsoft Word

Select **SignDoc** on the Toolbar. The following message window will appear.

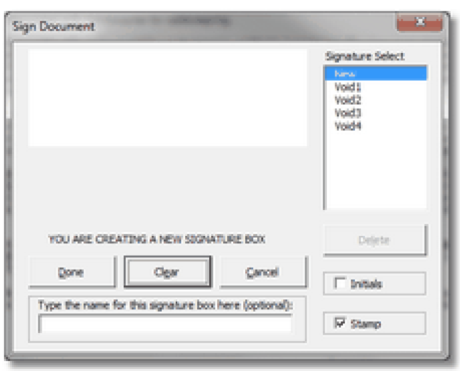


Figure 1.19 Sign Document

The New option in the Signature Select section will be highlighted, indicating a signature should be entered on the pad.

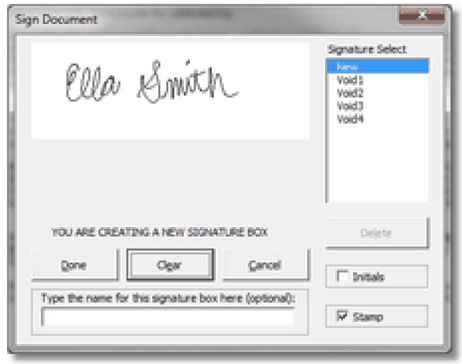
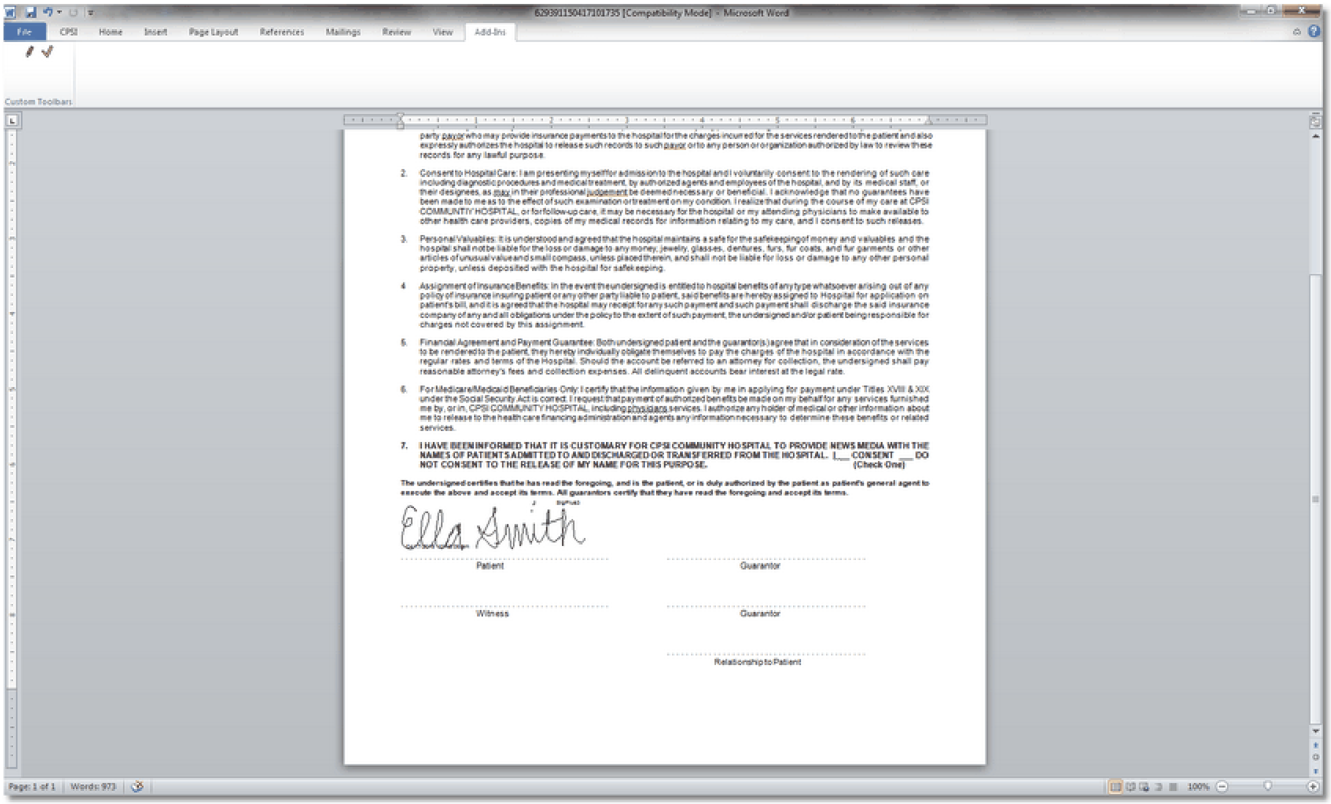


Figure 1.20 Sign Document

Once the signature has been entered, there are several options.

- **Done:** If the signature is correct, select this option to save it. The signature will then be displayed in the text of the document.
- **Clear:** If the signature is illegible or the patient wishes to re-sign, this option will clear the signature and allow a new one to be entered.
- **Cancel:** This option will exit the Sign Document mode without saving a signature.



party payor who may provide insurance payments to the hospital for the charges incurred for the services rendered to the patient and also expressly authorizes the hospital to release such records to such payor or to any person or organization authorized by law to review these records for any lawful purpose.

2. Consent to Hospital Care: I am presenting myself for admission to the hospital and I voluntarily consent to the rendering of such care including diagnostic procedures and medical treatment, by authorized agents and employees of the hospital, and by its medical staff, or their designees, as may in their professional judgement be deemed necessary or beneficial. I acknowledge that no guarantees have been made to me as to the effect of such examination or treatment on my condition. I realize that during the course of my care at CPSI COMMUNITY HOSPITAL, or for follow-up care, it may be necessary for the hospital or my attending physicians to make available to other health care providers, copies of my medical records for information relating to my care, and I consent to such releases.

3. Personal Valuables: It is understood and agreed that the hospital maintains a safe for the safekeeping of money and valuables and the hospital shall not be liable for the loss or damage to any money, jewelry, glasses, dentures, furs, fur coats, and fur garments or other articles of unusual value and small compass, unless placed therein, and shall not be liable for loss or damage to any other personal property, unless deposited with the hospital for safekeeping.

4. Assignment of Insurance Benefits: In the event the undersigned is entitled to hospital benefits of any type whatsoever arising out of any policy of insurance insuring patient or any other party liable to patient, said benefits are hereby assigned to Hospital for application on patient's bill, and it is agreed that the hospital may receipt for any such payment and such payment shall discharge the said insurance company of any and all obligations under the policy to the extent of such payment, the undersigned and/or patient being responsible for charges not covered by this assignment.

5. Financial Agreement and Payment Guarantee: Both undersigned patient and the guarantor(s) agree that in consideration of the services to be rendered to the patient, they hereby individually obligate themselves to pay the charges of the hospital in accordance with the regular rates and terms of the Hospital. Should the account be referred to an attorney for collection, the undersigned shall pay reasonable attorney's fees and collection expenses. All delinquent accounts bear interest at the legal rate.

6. For Medicare/Medicaid Beneficiaries Only: I certify that the information given by me in applying for payment under Titles XVIII & XIX under the Social Security Act is correct. I request that payment of authorized benefits be made on my behalf for any services furnished me by, or in, CPSI COMMUNITY HOSPITAL, including physicians services. I authorize any holder of medical or other information about me to release to the health care financing administration and agents any information necessary to determine these benefits or related services.

7. **I HAVE BEEN INFORMED THAT IT IS CUSTOMARY FOR CPSI COMMUNITY HOSPITAL TO PROVIDE NEWS MEDIA WITH THE NAMES OF PATIENTS ADMITTED TO AND DISCHARGED OR TRANSFERRED FROM THE HOSPITAL. I__ CONSENT __ DO NOT CONSENT TO THE RELEASE OF MY NAME FOR THIS PURPOSE. (Check One)**

The undersigned certifies that he has read the foregoing, and is the patient, or is duly authorized by the patient as patient's general agent to execute the above and accept its terms. All guarantors certify that they have read the foregoing and accept its terms.

Ella Smith

Patient	Guarantor
Witness	Guarantor
	Relationship to Patient

Figure 1.21 Microsoft Word

This enlargement shows the system-generated dates that are placed beneath the signature. The day of the week, month, year, entire date and time (including hour, minutes, seconds) are captured.

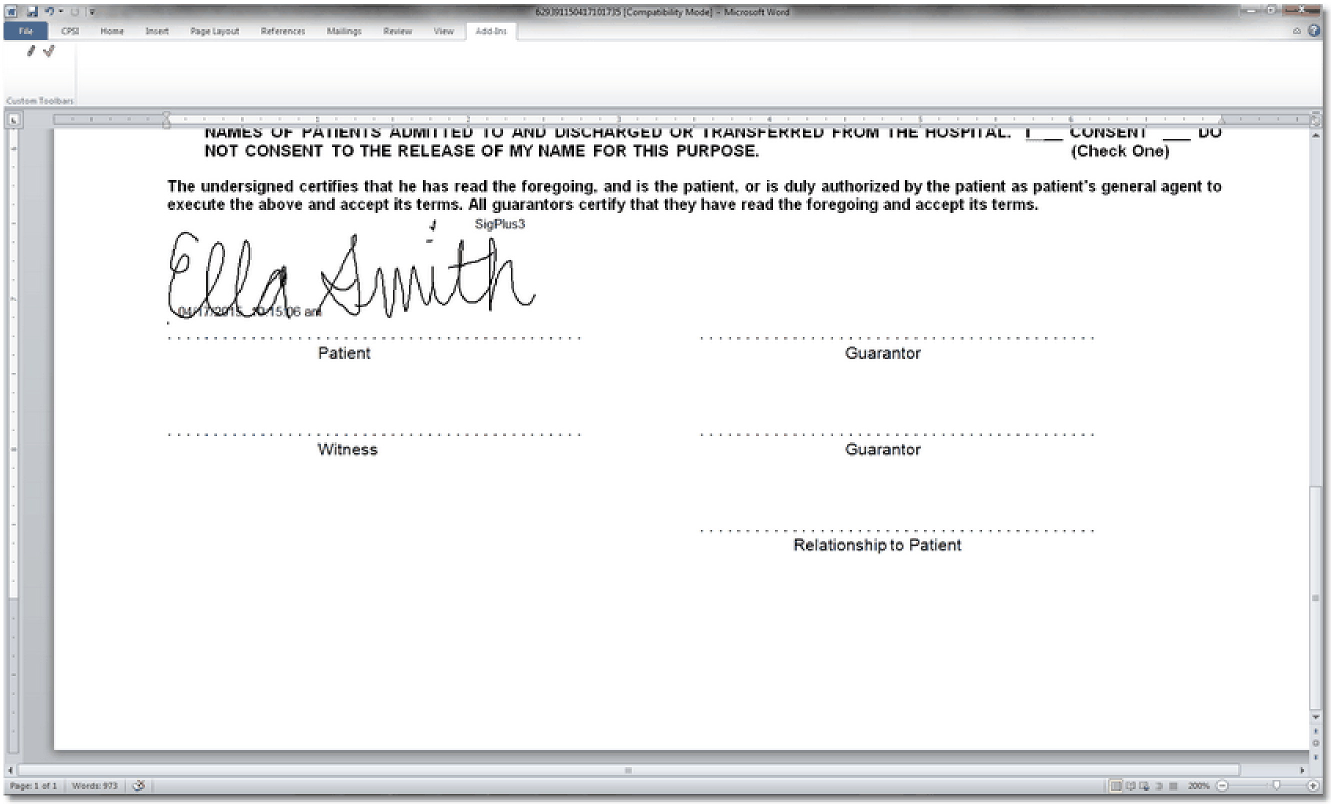


Figure 1.22 Microsoft Word

The system will also assign a number for that signature, such as SigPlus1. Once the second and subsequent signatures are captured, they will each be assigned a number.

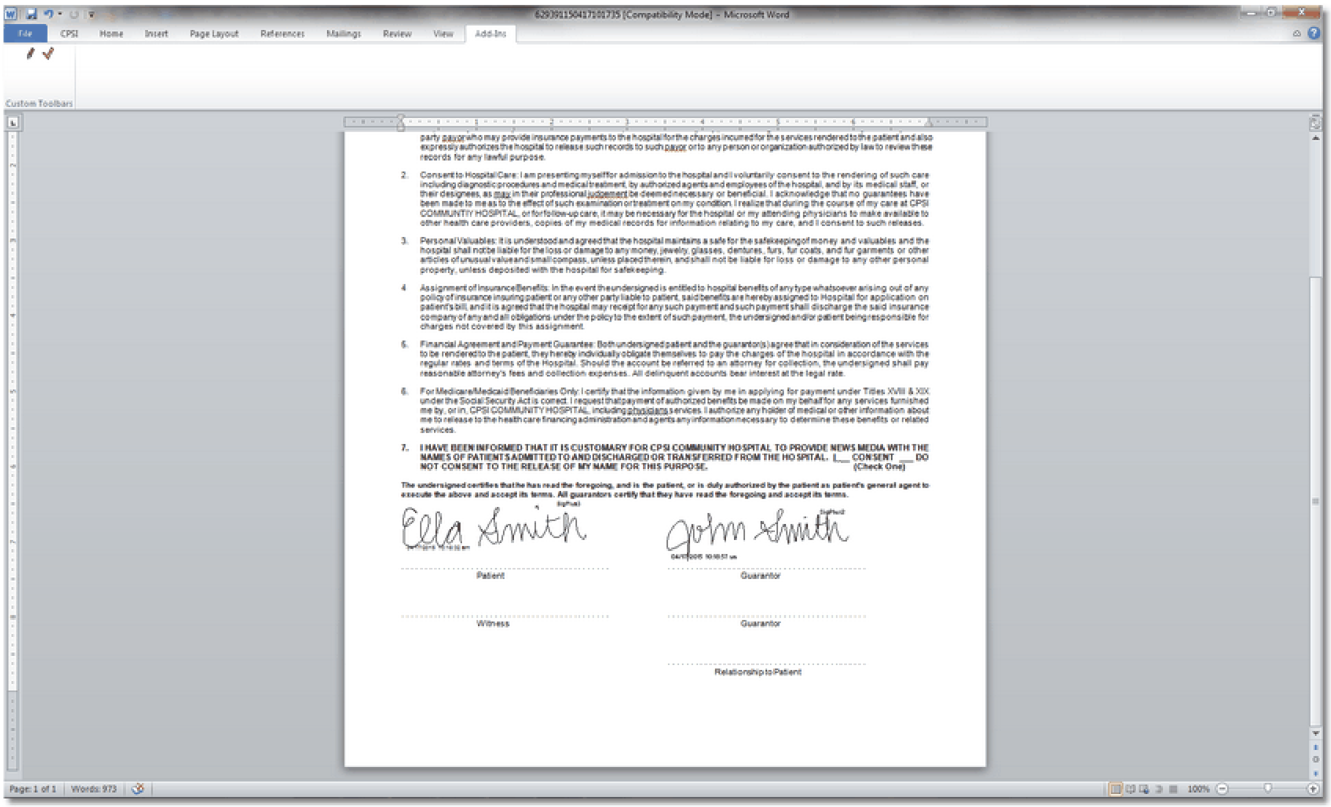


Figure 1.23 Microsoft Word

After selecting **Save/Exit**, the system will prompt to “Verify Signature.” If the signature was acquired, answer **Yes**.

Select **Hospital Base Menu** > **Account #** > **Census** > **Images** > **Store Digitally Signed Documents** > **<u>document</u>**

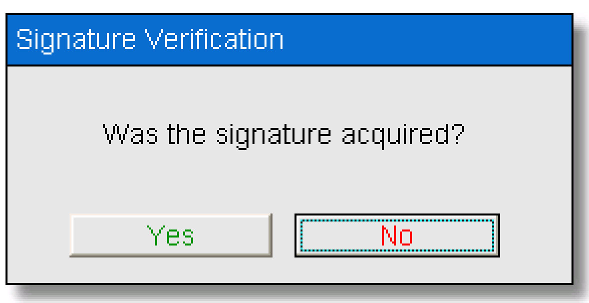


Figure 1.24 Verify Signature

Once a document has been signed, it can be accessed through Electronic File Management.

Select **Hospital Base Menu** > **Account #** > **Electronic File Management** > <u>**File List**</u>

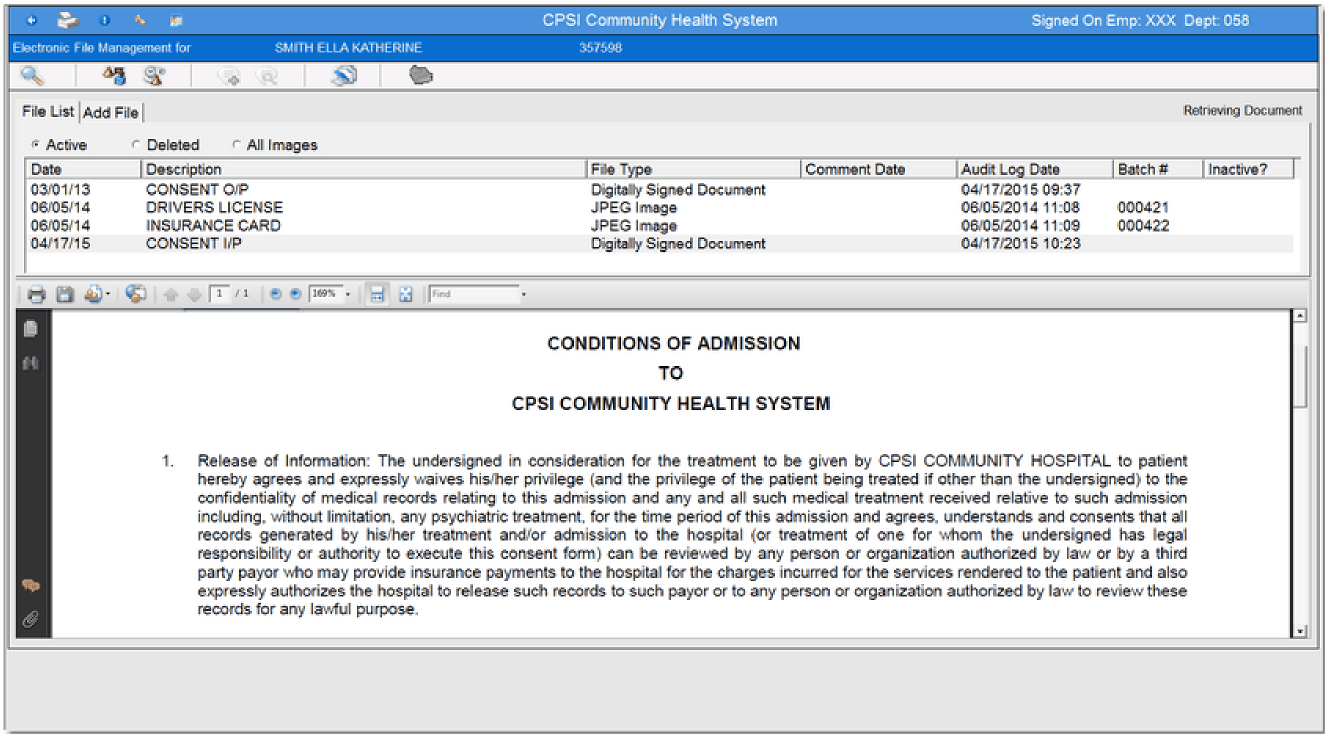


Figure 1.25 Electronic File Management

All signed documents and the signed dates will display in this listing along with any scanned images. To view a document select the line and the document will be viewable at the bottom of the screen.

Multiple Signature Operation

In the document needing the signature, arrow down or use the mouse to place the cursor at the point the last signature will need to be placed.

Once the cursor is where the signature should be located, select **SignDoc** on the toolbar.

Sign the name on the signature pad. Select **Done** when finished signing.

At this point, <u>do not select</u> **Enter**. If Enter is selected, and the user proceeds to enter another signature, the new signature entered will be valid but the prior signature will be cleared. To avoid clearing the signature, press the up arrow key or use the mouse to position the cursor above the signature to enter another new signature.

Enter the signature that would then need to appear next.

This process should be repeated until all signatures needed are on the document.

Changing an Existing Signature

A signature that has been captured can be changed after the initial storing. Upon initial entry of the signed document, the **Validate** button on the Toolbar must be selected before the signatures will display.

After the system verifies that the signatures have not been changed since original signature was saved, it will display the following message window:

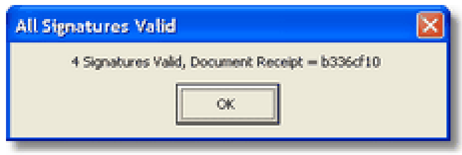


Figure 1.26 All Signatures Valid

To change an existing signature, select **SignDoc** on the Toolbar and highlight the signature, which is SigPlus2 in the example below. A new signature may then be entered to replace the current one.

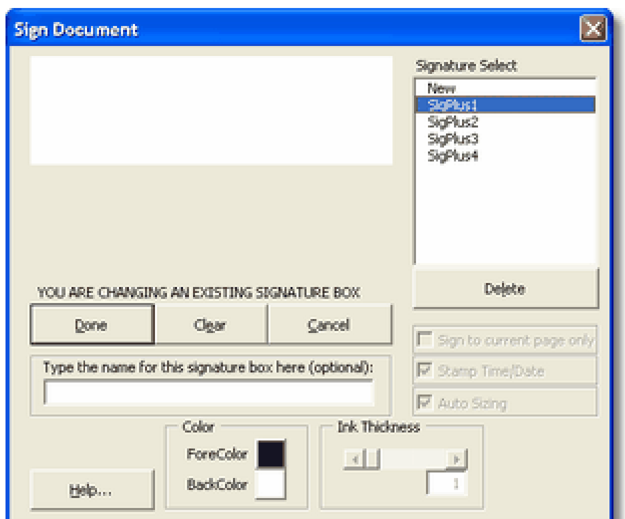


Figure 1.27 Sign Document

As shown in the screen print below, the new signature reflects the SigPlus2 title.

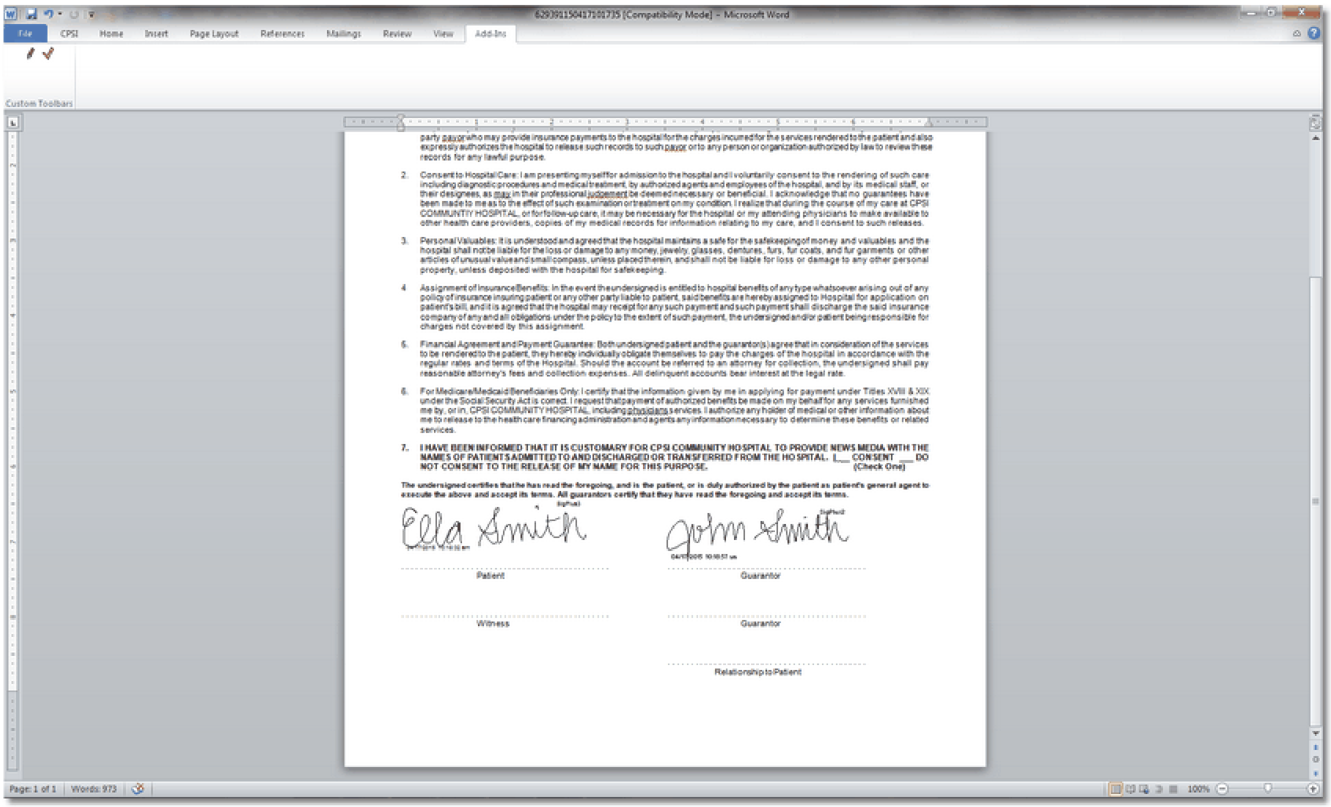


Figure 1.28 Microsoft Word

NOTE: *The content of a signed document can be changed through **View Digitally Signed Documents**, but the signatures will no longer be valid. Therefore, it is not recommended that document text be changed once a signature has been acquired.*

Deleting a Signature

To delete an existing signature, select **SignDoc** on the Toolbar and highlight the signature, which is SigPlus2 in the example below. Select **Delete,** and it will be removed from the document. All other signatures will retain their original SigPlus number.

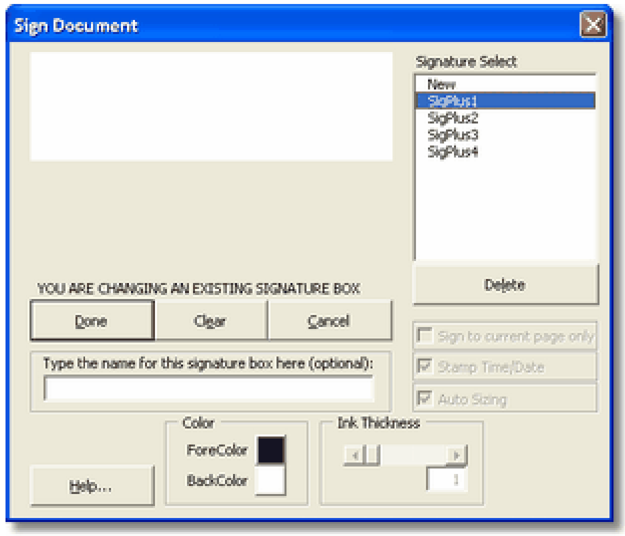


Figure 1.29 Sign Document

Deleting a Signed Document

To delete a signed document, select the file to be deleted. Select the Delete File tab. The Reason Codes from the Image Titles Table will appear. Highlight the Reason the selected file will be deleted. Next select the Save icon in the top left to delete the file. A warning message will appear stating the name of the file being deleted and the Reason for deletion that was selected. Select **OK** to delete the file or **Cancel** to exit without deleting the file. After the file has been deleted from an account, it may still be viewed. Deleted files will be flagged by being highlighted in red. The audit log for the file will be updated to reflect the date and time of deletion.

Select Hospital Base Menu > Patient Account # > Electronic File Management > Select document to delete > Change File tab > Delete File

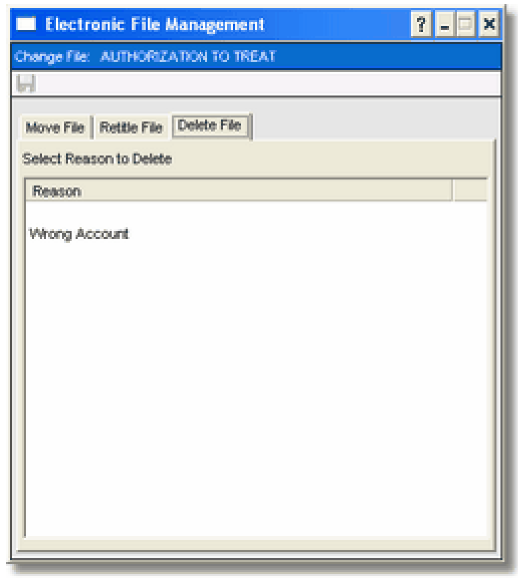


Figure 1.30 Change File

Batch Scanning

Batch Scanning will allow a batch of images to be scanned into the system, assigned a project number, edited, then moved into the Electronic File Management System. Images from a camera may also be uploaded. Editing may be done to these images by using many options. Images may be separated into document type folders automatically by using the barcode icon before scanning the documents or manually by using the assign document type. Either of these two options will need to be done in order to move the images from the Batch Scanning application to the Electronic File Management application.

Once Batch Scanning is selected the following screen will appear.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **Batch Scanning**

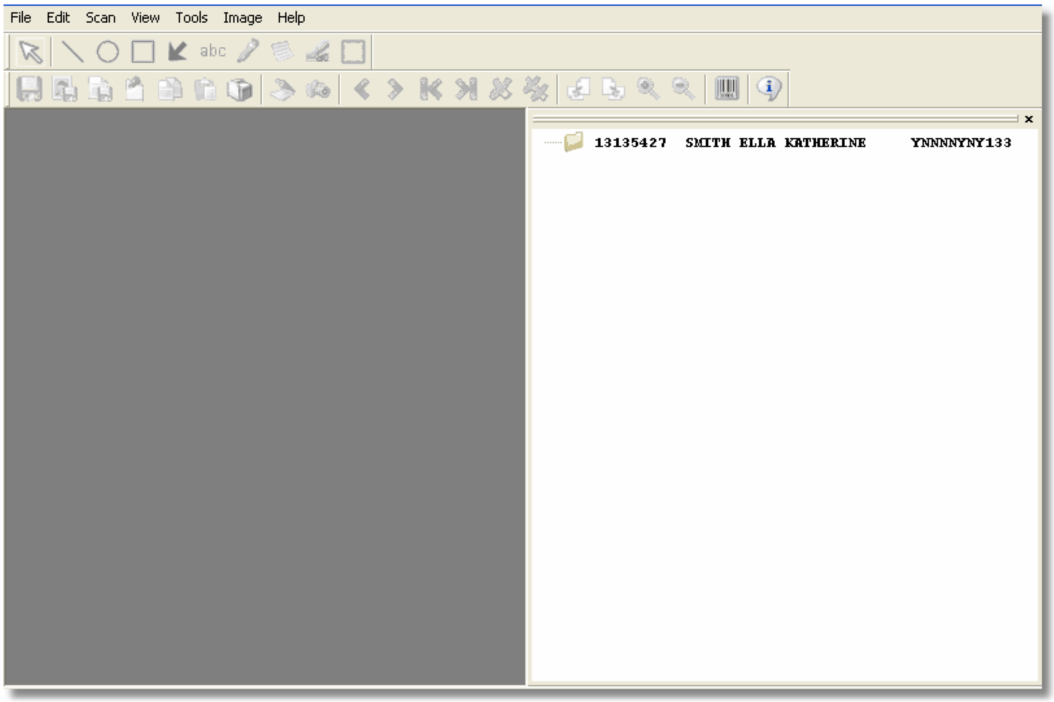


Figure 1.31 Batch Scanning

Barcode Scanning

To automatically place the images in the document folder select the barcode icon before scanning the image. Once this is selected the following screen will appear.

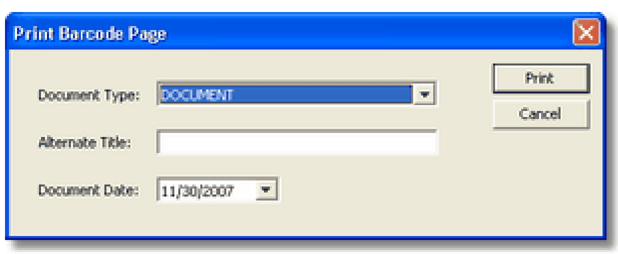


Figure 1.32 Print Barcode Page

- **Document Type:** Select the document title for the pages selected. This table pulls from the Image Title table in the Business Office Tables.

- **Alternate Title:** Enter the Alternate Title for this document. This option will be available if selected in the Image Title table in the Business Office Tables.

- **Document Date:** Select the document date to be used for this Document Title.The default will be the current date. The date entered will display next to the Image Title on the patient's account. This option will be available if selected in the Image Title table in the Business Office Tables.

Select **Print** to print the barcode sheet or **Cancel** to not print the barcode sheet.

This option will allow a barcode sheet to be printed. Each document type will have it's own barcode sheet. Once the Barcode sheet is printed, it will need to be placed in front of the batch of scanned images to be scanned.

If scanning a batch of different documents a barcode sheet may be printed for each document. Place the barcode sheet in front of the batch that pertains to that document type. This will allow the system to locate the correct folder the images should be placed.

An image may then be scanned or uploaded from the camera. The image will display once it is scanned or uploaded as shown below.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management** > **Batch Scanning** > **New Project** > **Scanned/Camera**

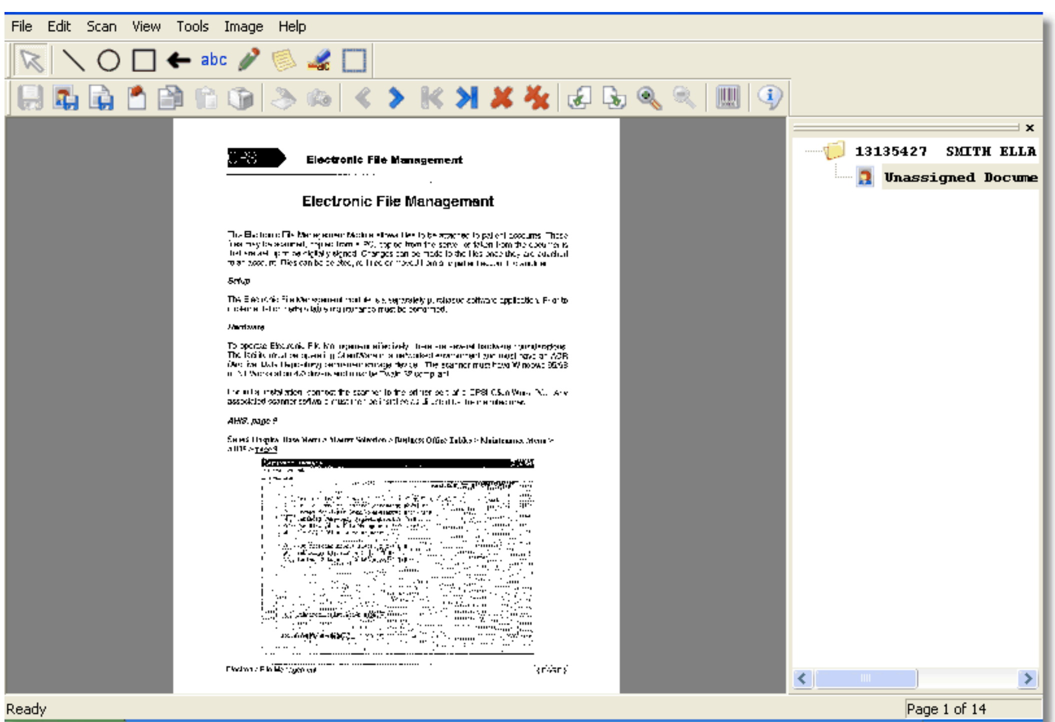
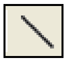
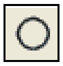
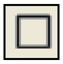
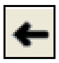
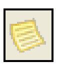
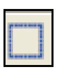
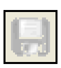
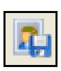


Figure 1.33 Batch Scanning

Once the image is displayed in the system, icon options at the top of the screen may be used for editing. Listed below are explanations of the icons.

- **No Annotation Tool:** This option will allow the pointer to be used.

-  **Draw a Line:** This option will allow a line to be drawn on the document.
-  **Draw an Ellipse:** This option will allow a circle to be drawn on the document.
-  **Draw a Rectangle:** This option will allow a rectangle to be drawn on the document.
-  **Draw an Arrow:** This option will allow an arrow to be drawn on the document.
-  **Draw Text:** This option will allow a text box to be on the document.
-  **Draw Freehand:** This option will allow anything to be written or drawn on the document.
-  **Add a Note:** This will allow a sticky note to be added to the document.
-  **Highlight Area:** This will allow areas in the document to be highlighted.
-  **Select Item:** This will allow an item in the document to be selected.
-  **Save:** This will allow changes to be saved without exiting the document.
-  **Save Current Image:** This will allow the document that is showing to be saved to a folder on the PC.
-  **Save Document:** This option will allow the entire document to be saved to a folder on the PC.
-  **Assign to Document Type:** This option will allow certain pages of the document to be assigned/saved to specific folders.
-  **Copy:** This will allow the document to be copied.
-  **Paste:** This will allow the document to be pasted in another location.
-  **Print:** This will allow the document to be printed.
-  **Acquire from Scanner:** Allows the images to be uploaded from a scanner into the Batch

Scanning application.

- **Acquire from Camera:** This will allow images to be uploaded from a camera into the Batch Scanning application.

- **Previous:** This option will view the previous document.

- **Next:** This option will view the next document within the batch.

- **First:** This option will view the first page of the batch.

- **Last:** This option will view the last page of the batch.

- **Delete Image:** This option will allow the document showing to be deleted.

- **Delete All:** This option will allow the entire batch of documents to be deleted.

- **Rotate Left:** This option will allow the document to be turned to the left for viewing.

- **Rotate Right:** This option will allow the document to be turned to the right for viewing.

- **Enlarge:** This option will allow the document to view larger.

- **Reduce:** This option will allow the document to view smaller.

- **Barcode:** This option will allow a barcode sheet to be printed. This barcode sheet is used before batch scanning in order to group documents together.

- **About:** This will display the cpBatchScan Version.

After editing the image, select , Save current Image, to save the current image or select , Save Document, to save the entire document.

Assign Document Type

If the barcode icon was not used before scanning, the images may be manually placed in the document type folders by selecting Assign Document Type. Once Assign Document Type is selected this screen below will appear:

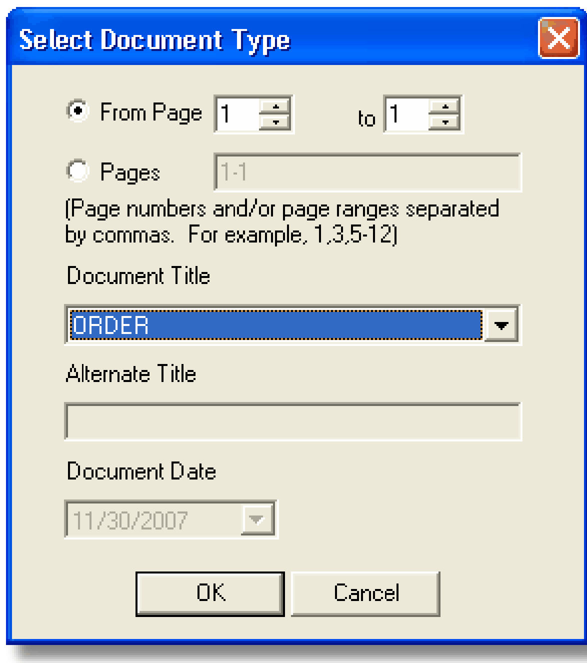


Figure 1.34 Select Document Type

- **From Page:** This will allow pages to be selected for this document type.
- **Pages:** This will allow page numbers or a range of pages to be selected for this document type.
- **Document Title:** Select the Document Title for the pages selected. This table pulls from the Image Title table in the Business Office Tables.
- **Alternate Title:** Enter the Alternate Title for this document. This option will be available if selected in the Image Title table in the Business Office Tables.
- **Document Date:** Select the document date to be used for this Document Title. The default will be the current date. The date entered will display next to the Image Title on the patient's account.

Select **Ok** to save the selected information or **Cancel** to not save document type information.

If the Batch Scanning application is exited without the images placed in a document folder, this screen will appear.

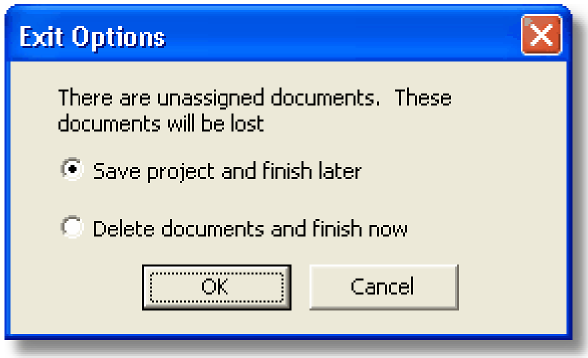


Figure 1.35 Exit Options

- **Save project and finish later:** Select this field to keep the project in the Batch Scanning application. This option could be used to save changes and be edited at a later date.

- **Delete documents and finish now:** Select this field to delete the batch. This option could be used if the batch was no longer needed or needs to be scanned/uploaded at a later date.

If **Save project and finish later** is selected the following screen will appear when re-entering Batch Scanning.

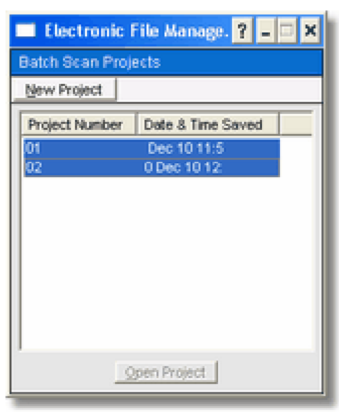


Figure 1.36 Batch Scan Projects

For new images being entered into the system select **New Project**. To edit an existing image highlight the desired **Project Number** then select **Open Project** to view image. This will allow the image to be further edited and/or moved into the selected document folders.

Once the images are saved and moved into the desired document folders, the images will no longer appear in batch scanning. The images will then be moved into the Electronic File Management application.

CCD Documents in Electronic File Management

The system will automatically generate and add a Patient Summary and Referral/Transition of Care Summary to the Print Electronic Record list when a visit is created.

Select **Hospital Base Menu** > **Master Selection** > **Medical Records** > **Print Electronic Record** > **Account Number**

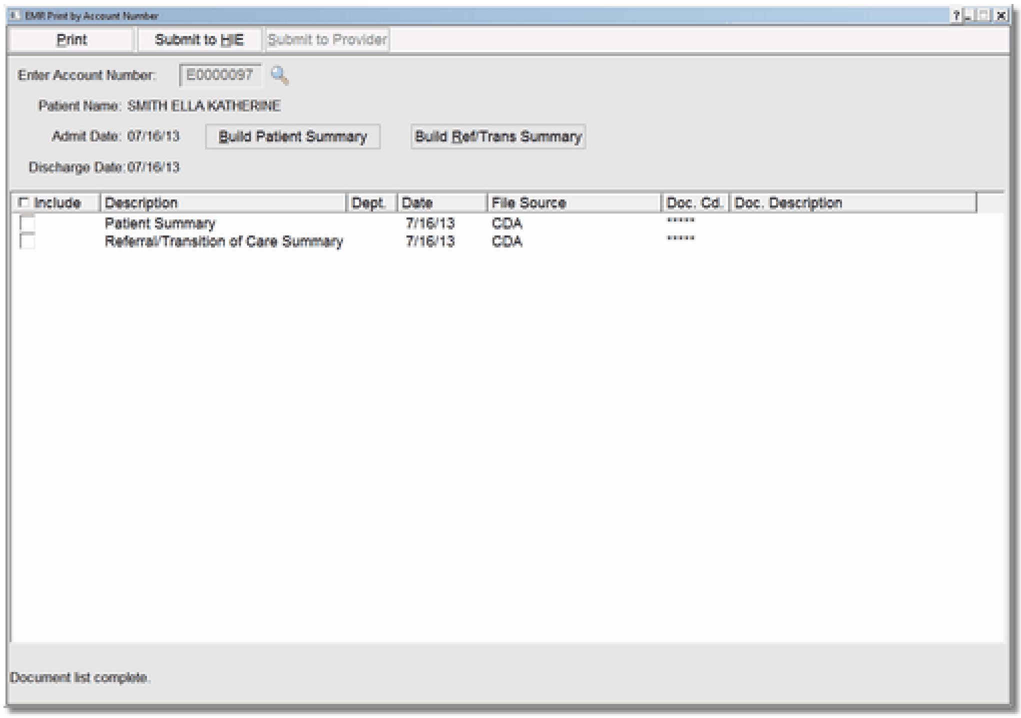


Figure 1.37 EMR Print by Account Number

If the Patient Summary or Referral/Transition of Care Summary is viewed, printed, exchanged through HIE Interface or submitted via Submit to Provider and Release of Information is updated, a copy of the document will be saved in Electronic File Management. The document will have a file type of Clinical Document Arch (Clinical Document Architecture). The Patient Summary will be saved with a description of z_CCDA:Patient Summary and the Referral/Transition of Care Summary will be saved with a description of z_CCDA:Referral/Transition. The Electronic File Management audit log will be updated with the date, time and employee name when the document is saved.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management**

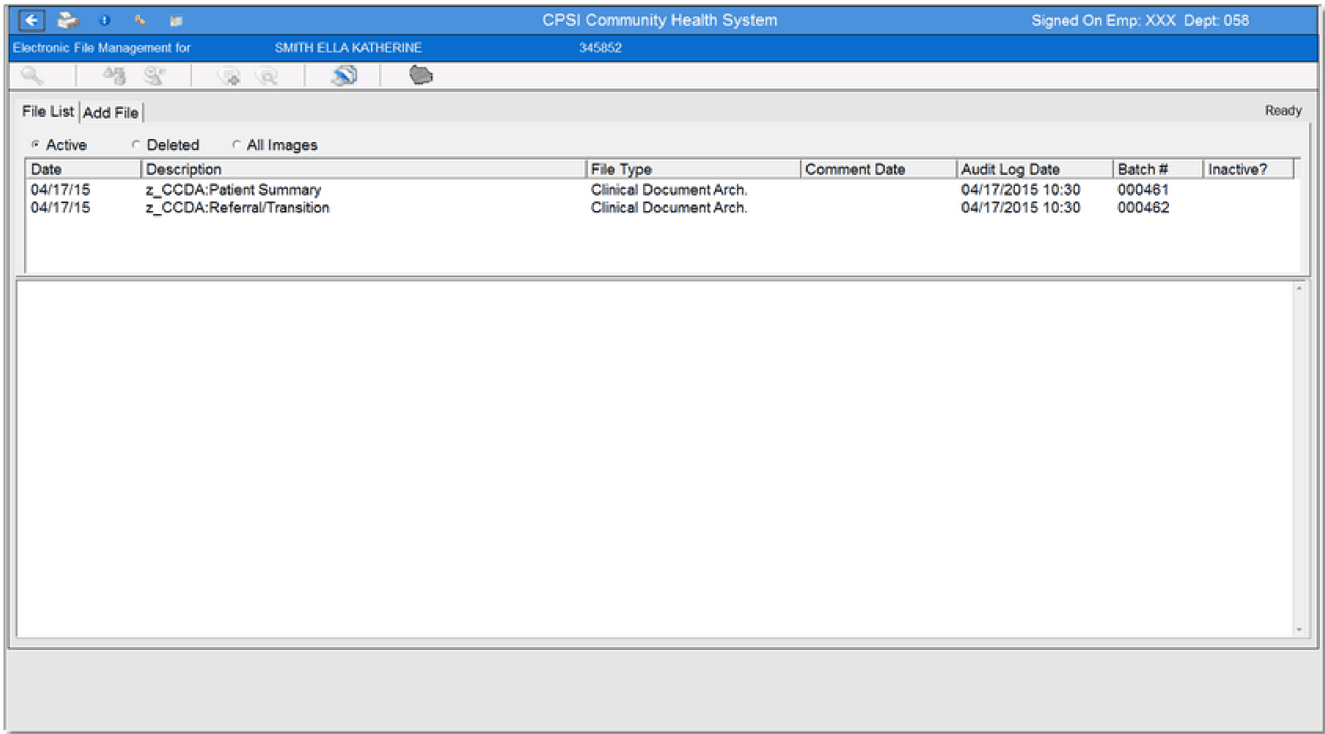


Figure 1.38 Electronic File Management

E-Signing Scanned Documents

E-Signing scanned documents will allow images, scanned in through batch scanning, to be electronically signed and stored on a patient's account. The signed image will then show on the File List tab in Electronic File Management. For a facility to be able to E-Sign scanned documents, contact CPSI Financial Support to turn on this feature.

NOTE: *In order to use this feature, facilities will need to be using User Based Logins.*

To begin the process for E-Signing scanned images, the Image Title Table needs to have the Allow ESign for this document field selected for every title that could potentially be E-Signed.

Select **Hospital Base Menu** > **Master Selection** > **Business Office Tables** > **Business Office Tables Maintenance** > **Image Titles** > **Document Titles** > **<u>New</u>**

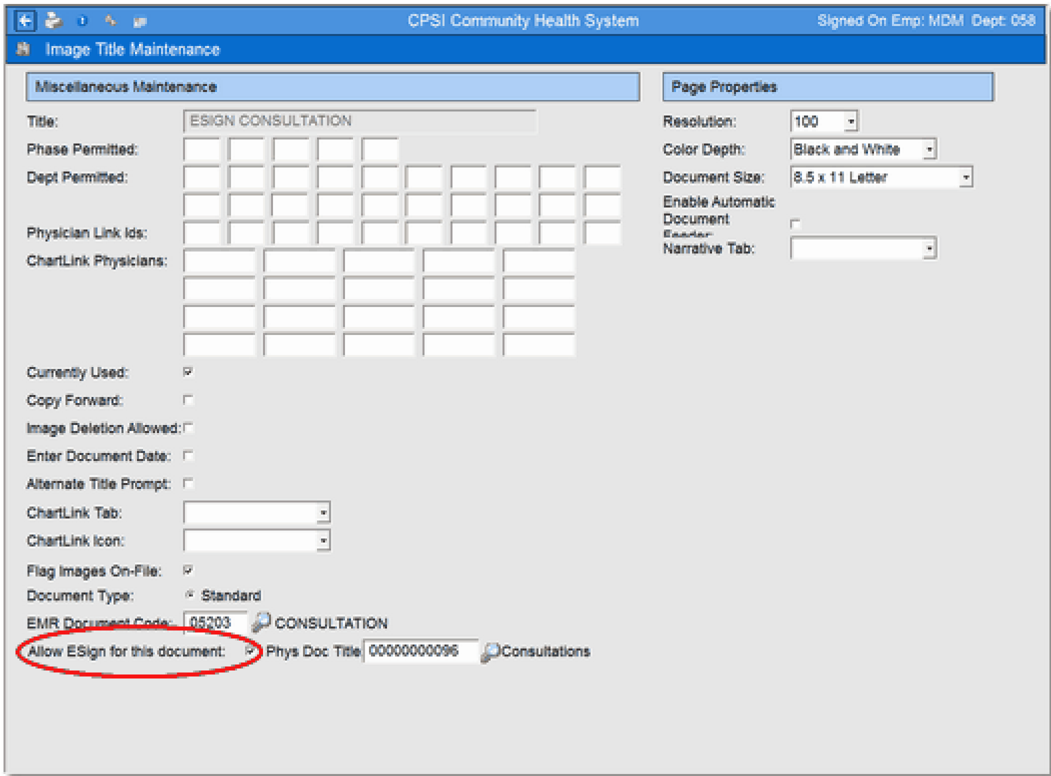


Figure 1.39 Image Title Maintenance

Documents will need to be scanned onto the account through batch scanning. Refer to the Electronic File Management documentation for information concerning Batch Scanning.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management**

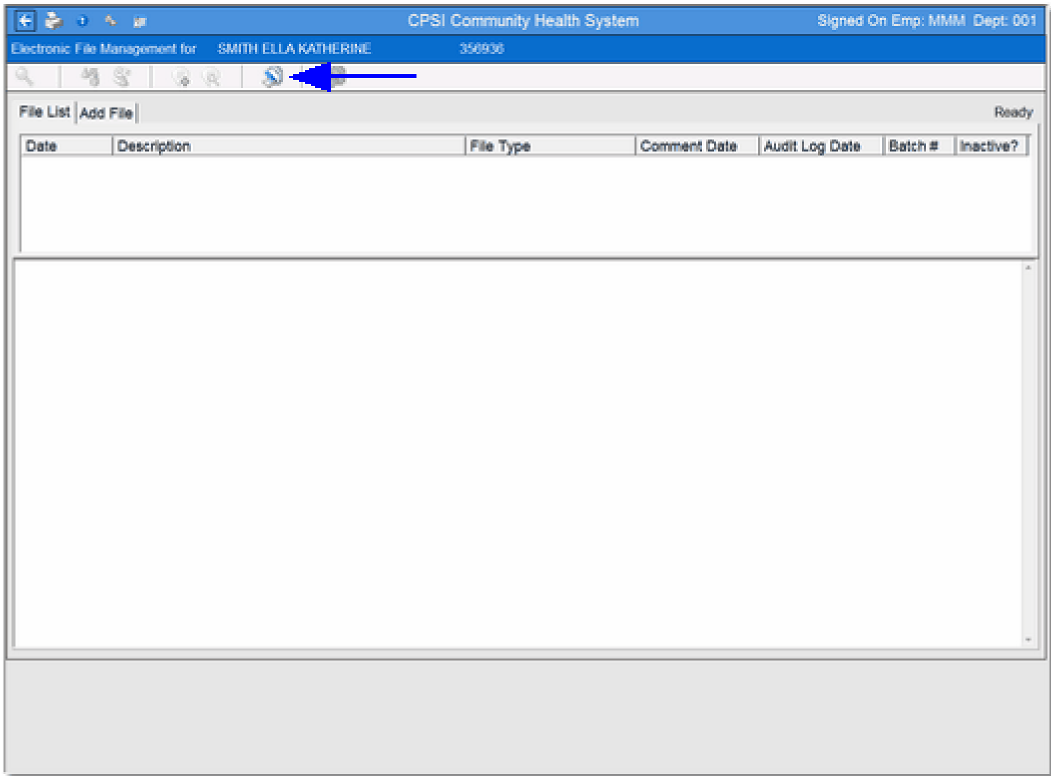


Figure 1.40 Electronic File Management

Once the document has been batch scanned it will be placed in Assign Images to Sign Queues.

Select **Hospital Base Menu** > **Master Selection** > **Assign Images to Sign Queues**

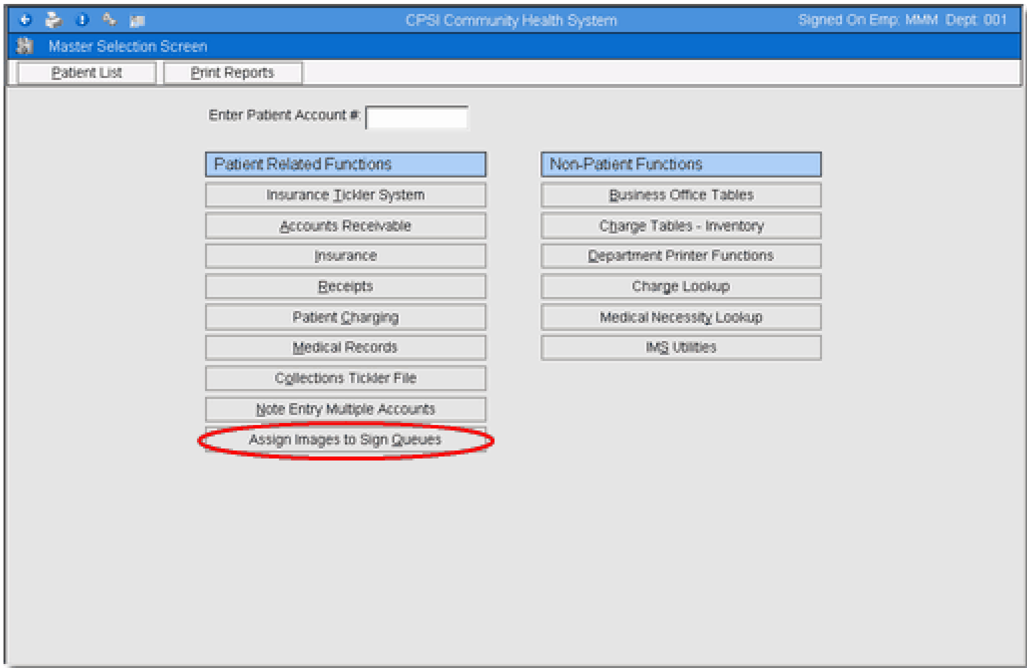


Figure 1.41 Assign Images to Sign Queues

Assigning E-Sign Documents

Follow the steps below to assign documents to employees or physicians to be E-Signed:

NOTE: *The Allow Changing Scanned Documents security switch needs to be set to* ***Y*** *in Employee Security for assigning documents to e-sign queues.*

Select **Assign Images to Sign Queues** to assign the documents.

Select **Hospital Base Menu** > **Master Selection** > **Assign Images to Sign Queues**

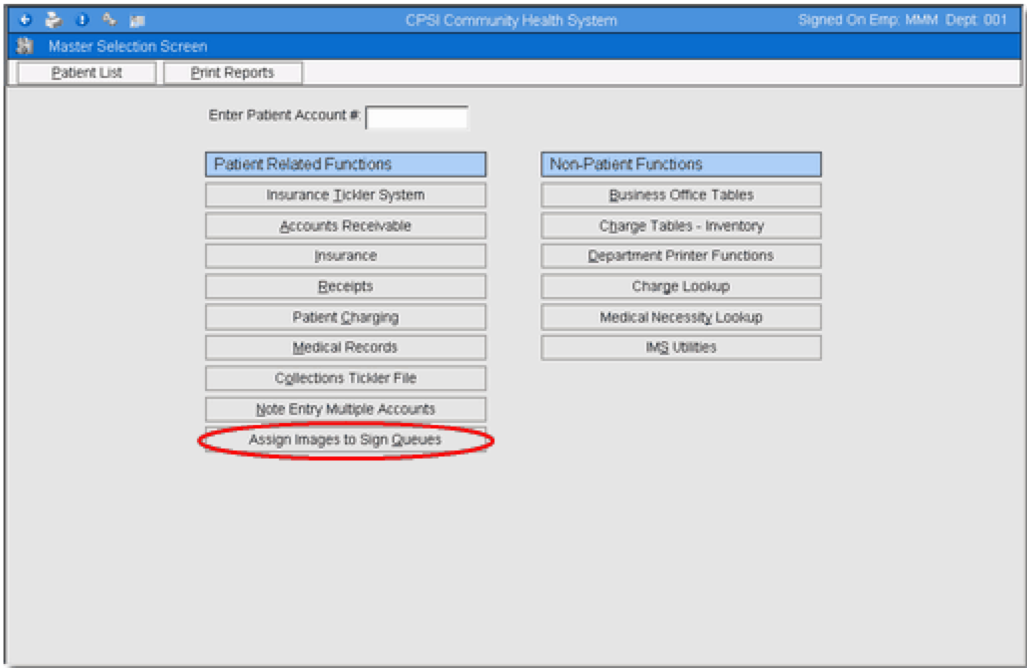


Figure 1.42 Assign Images to Sign Queues

Once Assign Images to Sign Queues has been selected, the Document Requiring Signature screen will display.

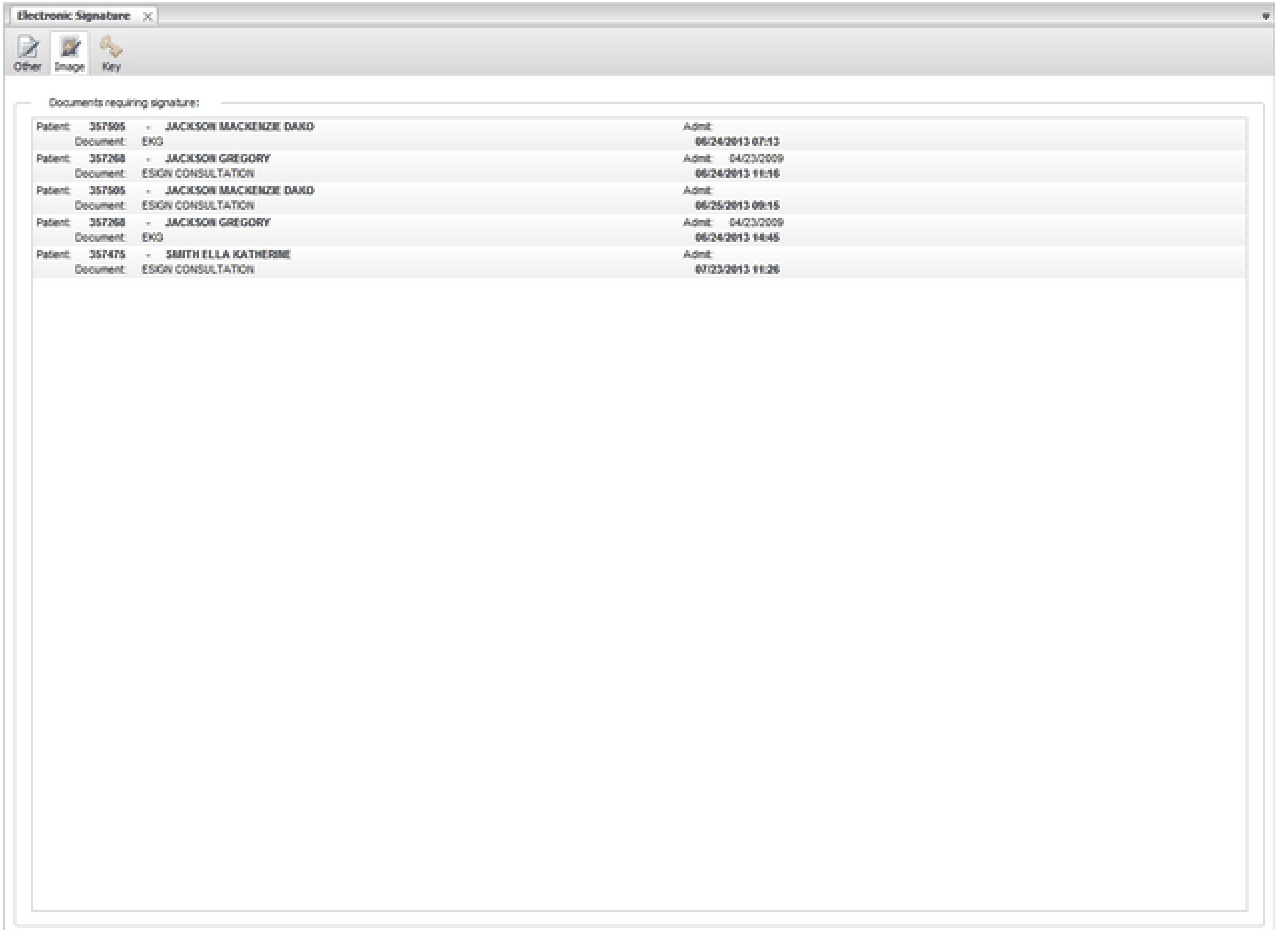


Figure 1.43 Assign Images to Sign Queues

The account number, patient name, admit date, document title and the date and time the document was scanned will display. Select the scanned document needing assignment.

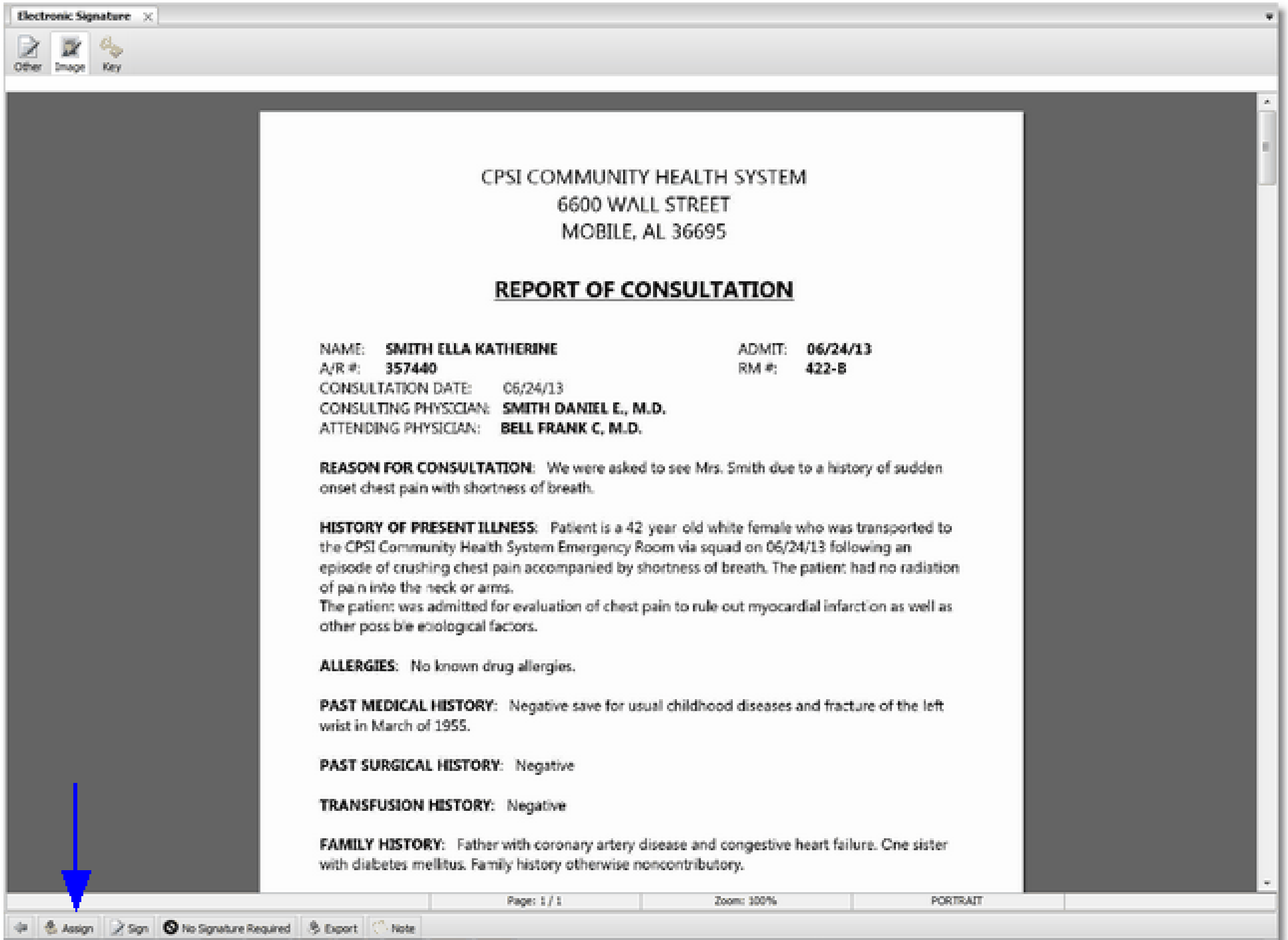


Figure 1.44 Assign Images to Sign Queues

The selected scanned document will display different options on the action bar:

-  **:** When this option is selected, it will go back to the previous screen to show the listing of documents that need to be assigned.

- **Assign:** When this option is selected, it will allow an employee or physician to be assigned to the scanned document for E-Signing. When the scanned document is assigned, it will then display in that employee or physician's E-Sign queue for images.

- **Sign:** When this option is selected, it will allow the employee or physician to E-Sign the scanned document.

NOTE: *E-Signing documents will be discussed in the* *Procedures for E-Signing Scanned Documents* 50 *section.*

- **No Signature Required:** When this option is selected, the document will be saved as a non-signature document and will not be sent to an employee or physicians E-Sign queue.

- **Export:** This option is for future use.

- **Note:** When this option is selected, a note may be sent to an employee or physician with the scanned document attached.

NOTE: *Note entry and viewing a note will be discussed in the* *Note* 68 *section.*

Select **Assign** to display a list of all employee and physician User Based Logins currently setup in the system. An employee or physician's first or last name may be entered into the Search field to delimit the list of User Base Logins. The Search Type drop-down box may be used to search for employees or physicians by Employee ID, Log Name, Name or Physician ID. The default is to search by Name.

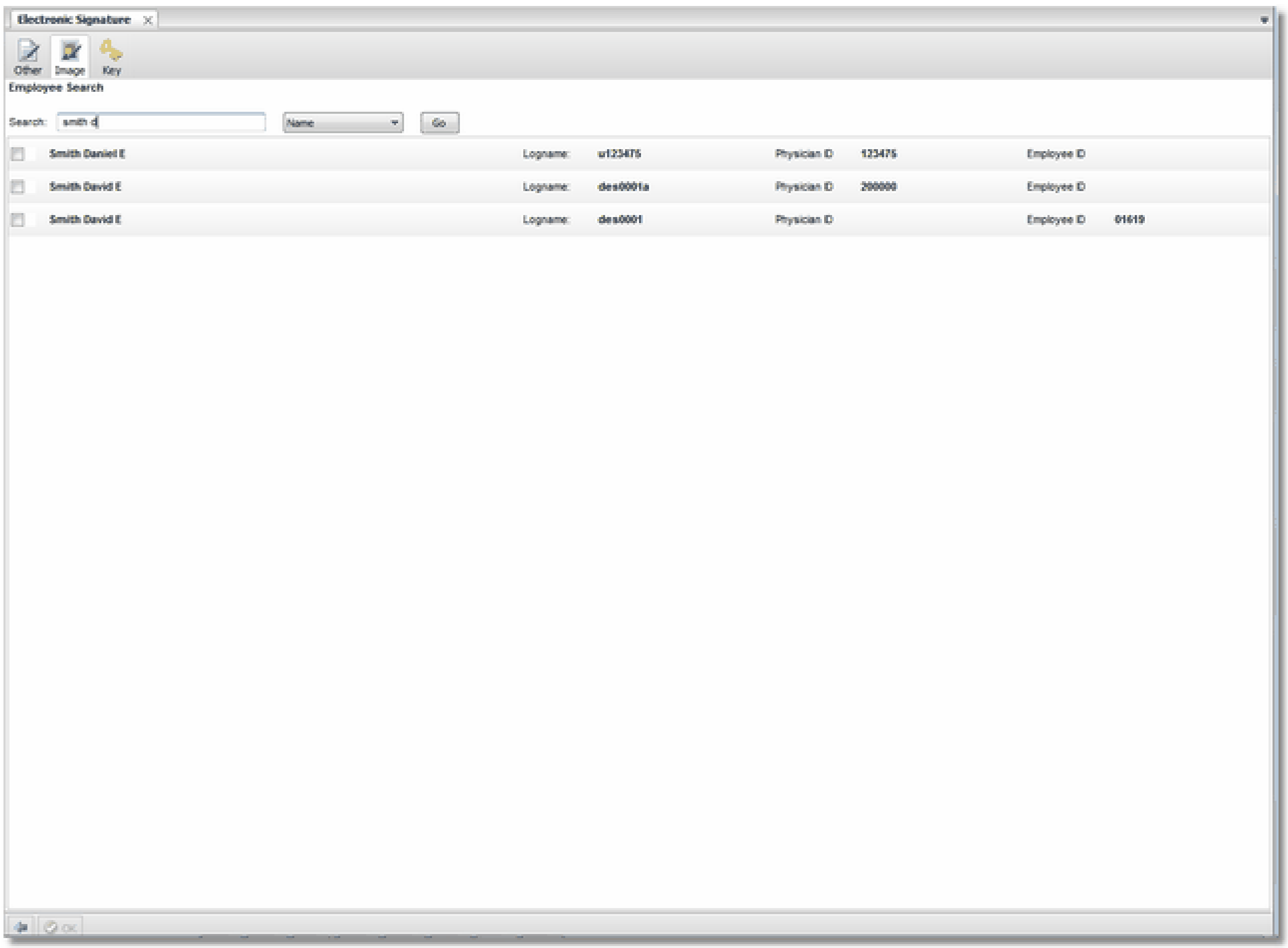


Figure 1.45 Assign Images to Sign Queues

Once the name of the employee or physician has been located, select the correct User Based Login and then select **OK** on the action bar.

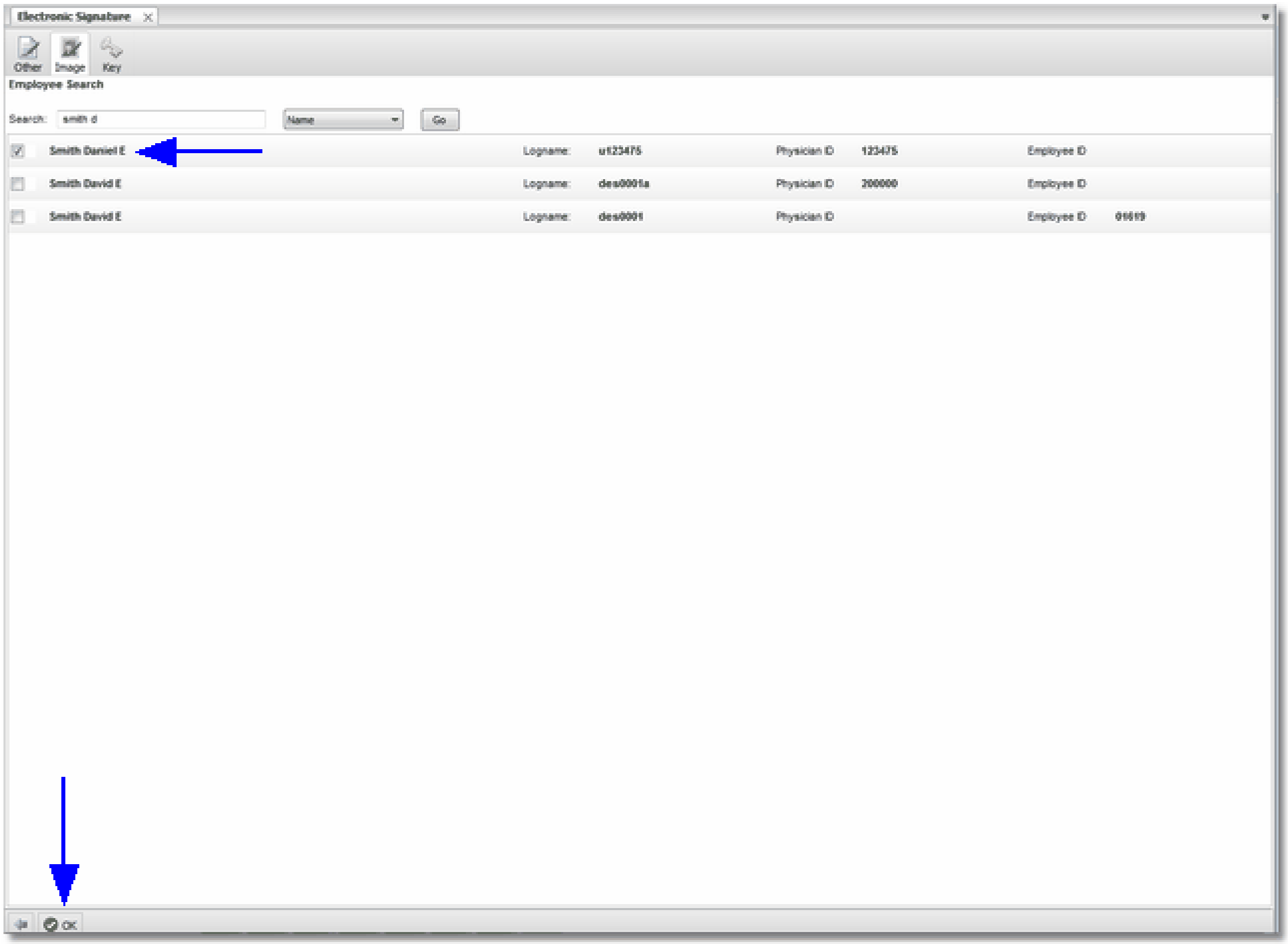


Figure 1.46 Assign Images to Sign Queues

The document be sent to the employee or physician's E-Signature for Images queue, and will be removed from Assign Images to Sign Queues.

NOTE: *The Electronic File Management Audit Log will be updated when a document is assigned to an employee or physician with the date, time and the assigning employee's name. The EPHI Audit Log will be updated when a document is assigned showing that Image Storage was accessed.*

Setting up a Passphrase

Before a document can be E-Signed, a passphrase needs to be created. To create a passphrase, access either Assign Images to Sign Queues or Electronic Signatures for Images.

NOTE: *Passphrases may only be set up for employees or physicians signed in to Clientware.*

Hospital Base Menu > Master Selection > Assign Images to Sign Queues

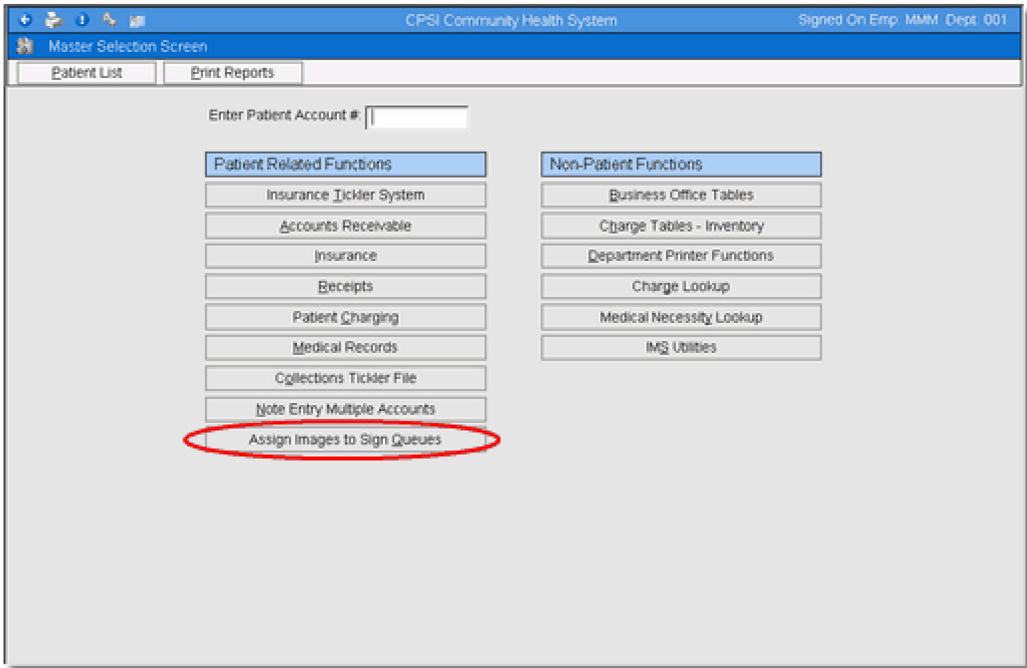


Figure 1.47 Assign Images to Sign Queues

Hospital Base Menu > Electronic Signature for Images

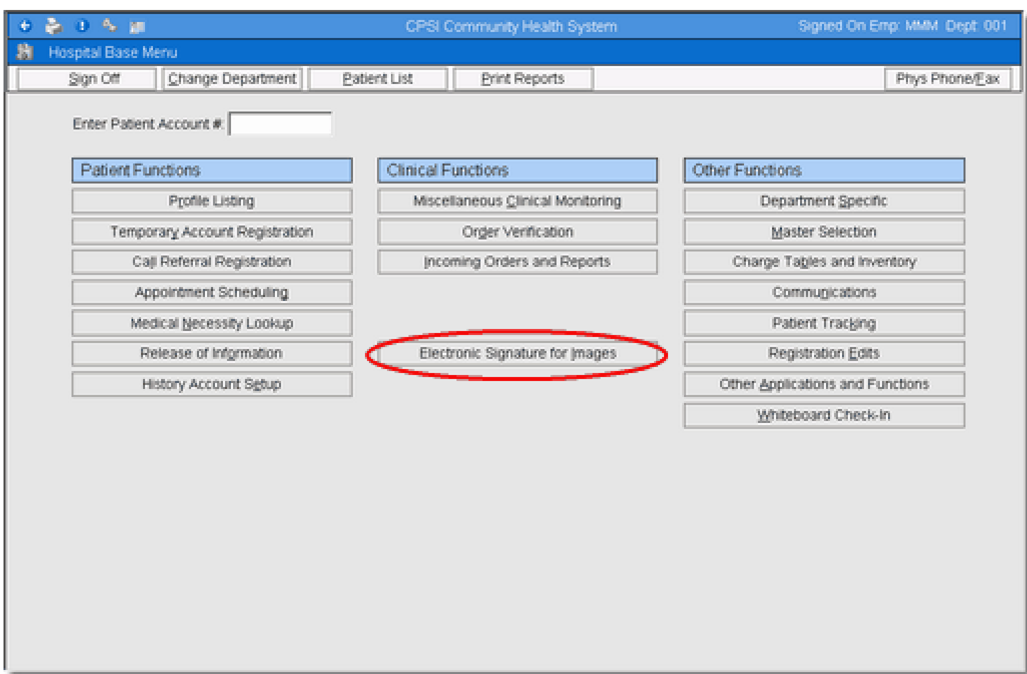


Figure 1.48 Electronic Signature for Images

Select the **Key** icon at the top of the screen.

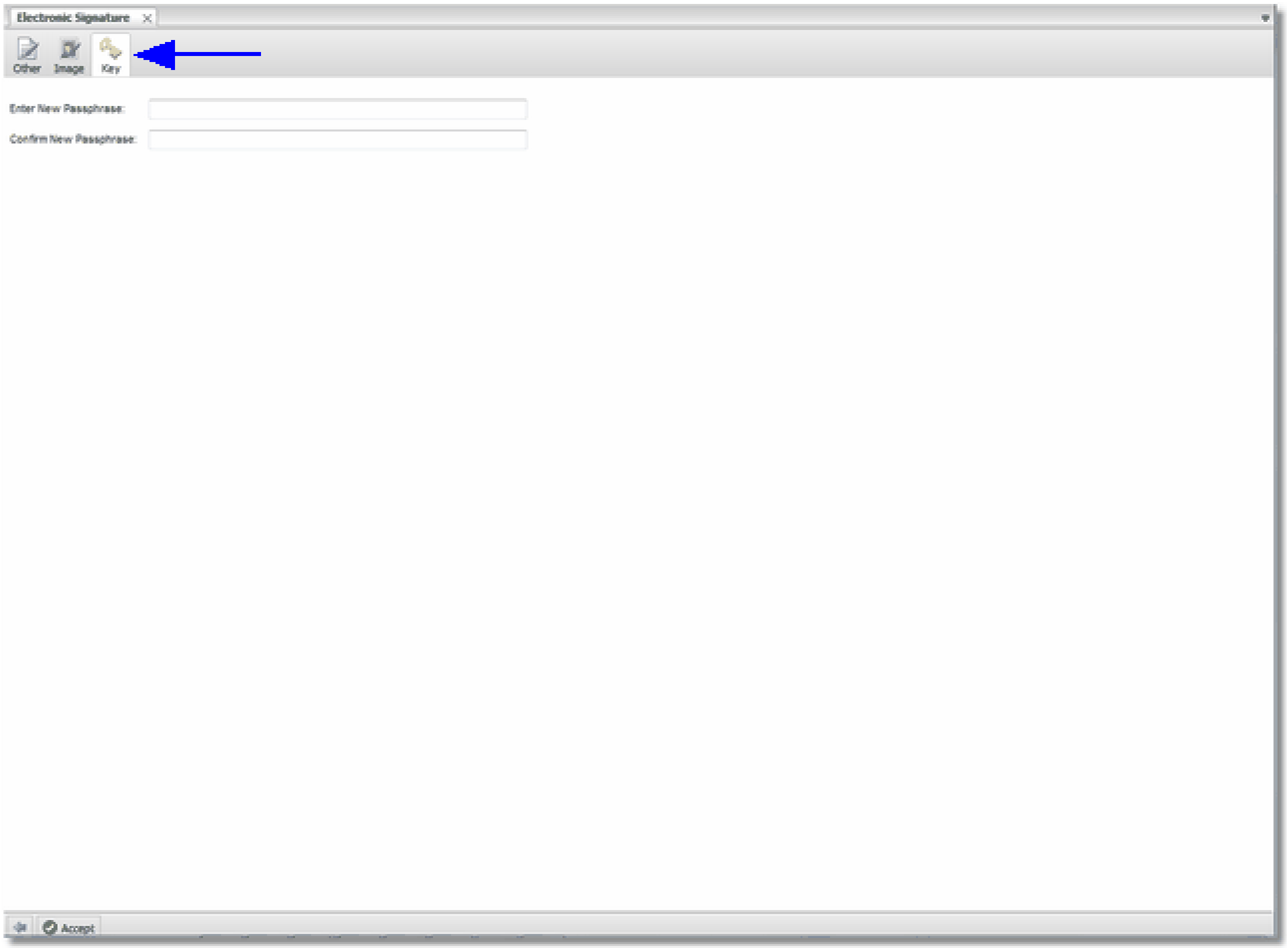


Figure 1.49 Electronic Signature

Enter in the passphrase the signed on employee or physician will be using. The passphrase must be at least 10 characters with one uppercase letter, one lowercase letter and one number.

After entering the passphrase and confirming it, press the Enter key and then select **Accept** on the action bar.

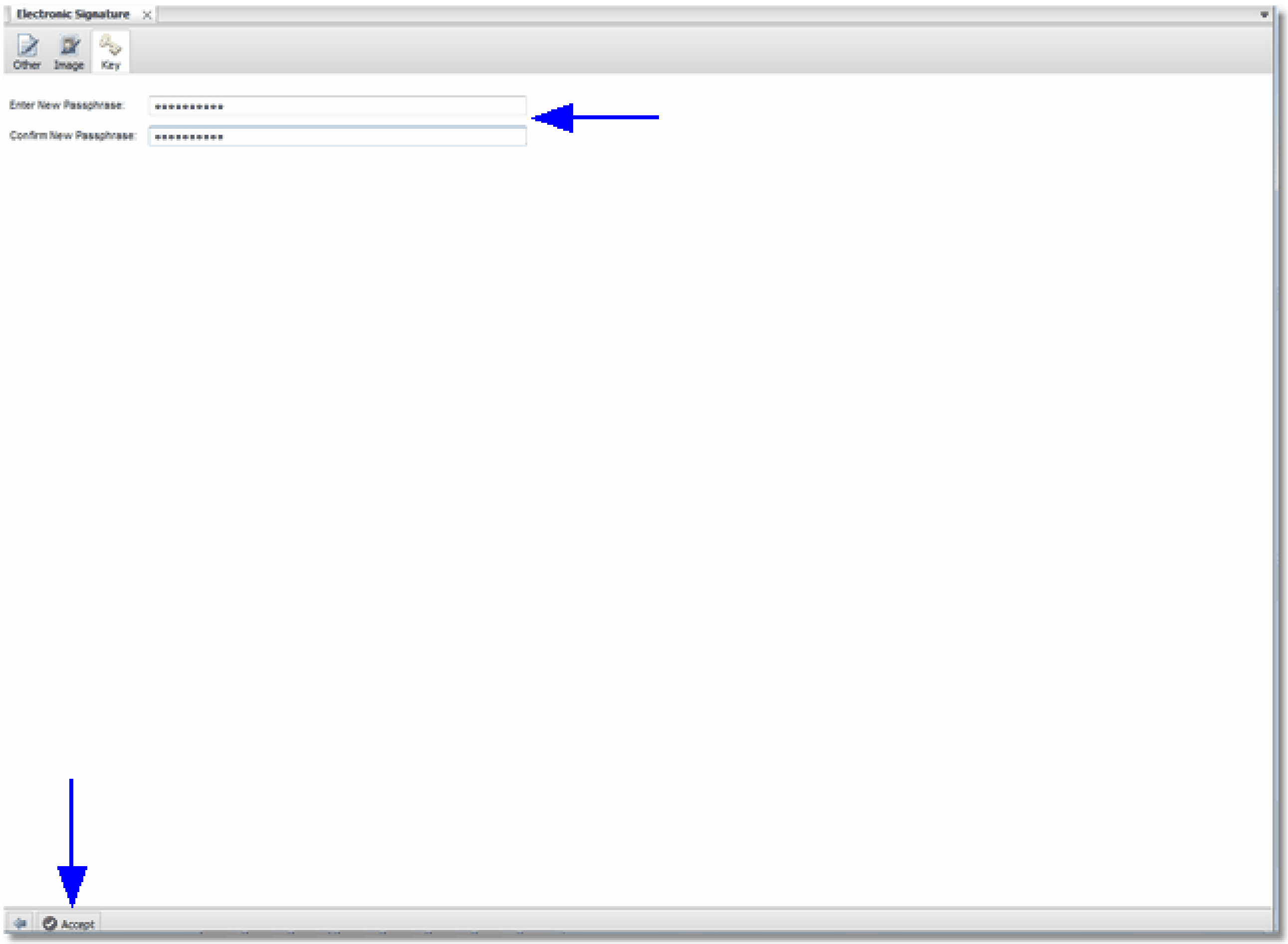


Figure 1.50 Electronic Signature - Passphrase

If the passphrase is entered in correctly, a box will then display "Success!". Select **OK** to close the display.

Figure 1.51 Electronic Signature - Passphrase

Procedures for E-Signing Scanned Documents

There are three ways that a scanned document may be E-Signed.

1. The Assign Images to Sign Queues option
2. The Electronic Signature for Images option
3. The Home Screen

Assign Images to Sign Queue

To E-sign a scanned using the **Assign Images to Sign Queues** option, follow the steps bellow:

Hospital Base Menu > **Master Selection** > **Assign Images to Sign Queues**

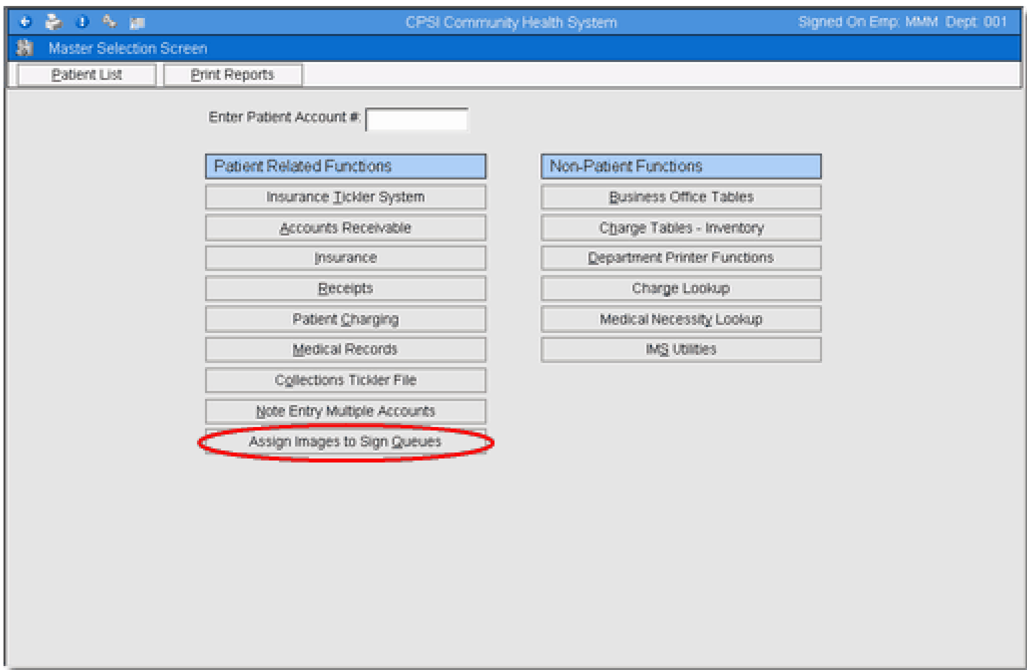


Figure 1.52 Assign Images to Sign Queues

Once Assign Images to Sign Queues has been selected, a list of scanned documents requiring a signature will display. Select the scanned document to be e-signed.

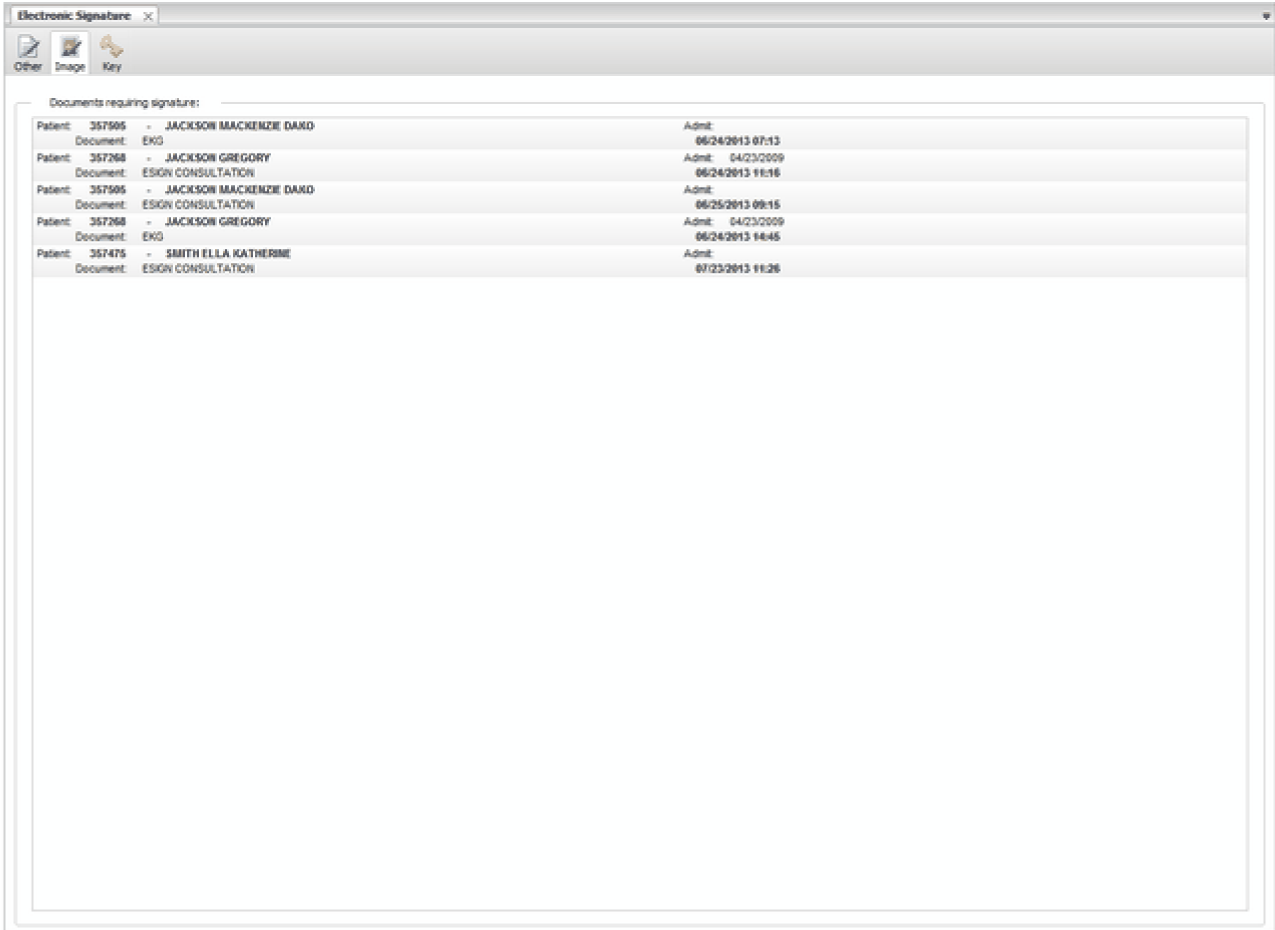


Figure 1.53 Assign Images to Sign Queues

The scanned document will be displayed on the screen. If the scanned document was sent in error select No Signature Required to remove the scanned document from the queue. Select **Sign** on the action bar.

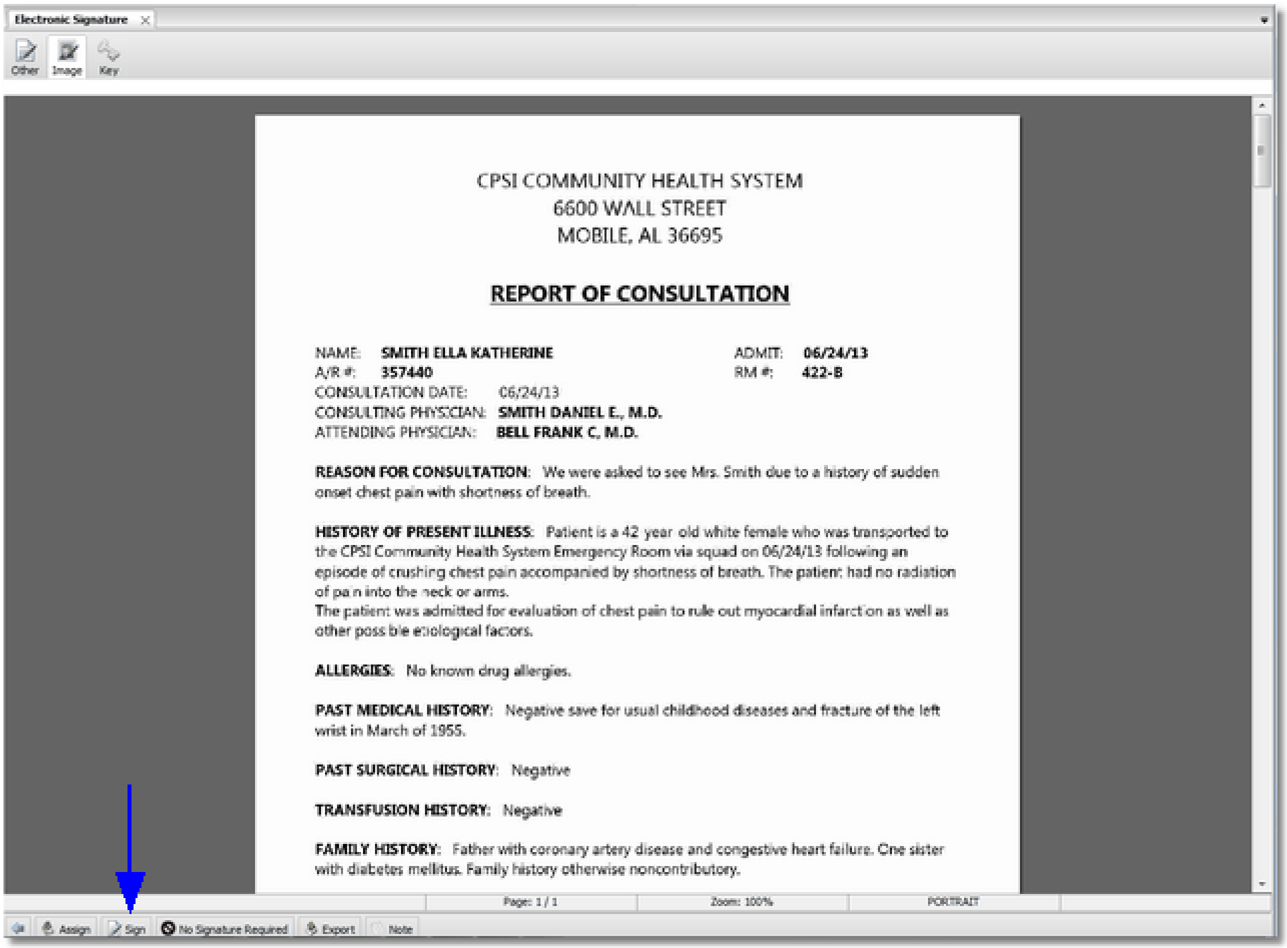


Figure 1.54 Assign Images to Sign Queues

The system will prompt to enter the Passphrase set up by the employee or physician. Type in the passphrase and hit the Enter key, then select **Accept** at the on the action bar.

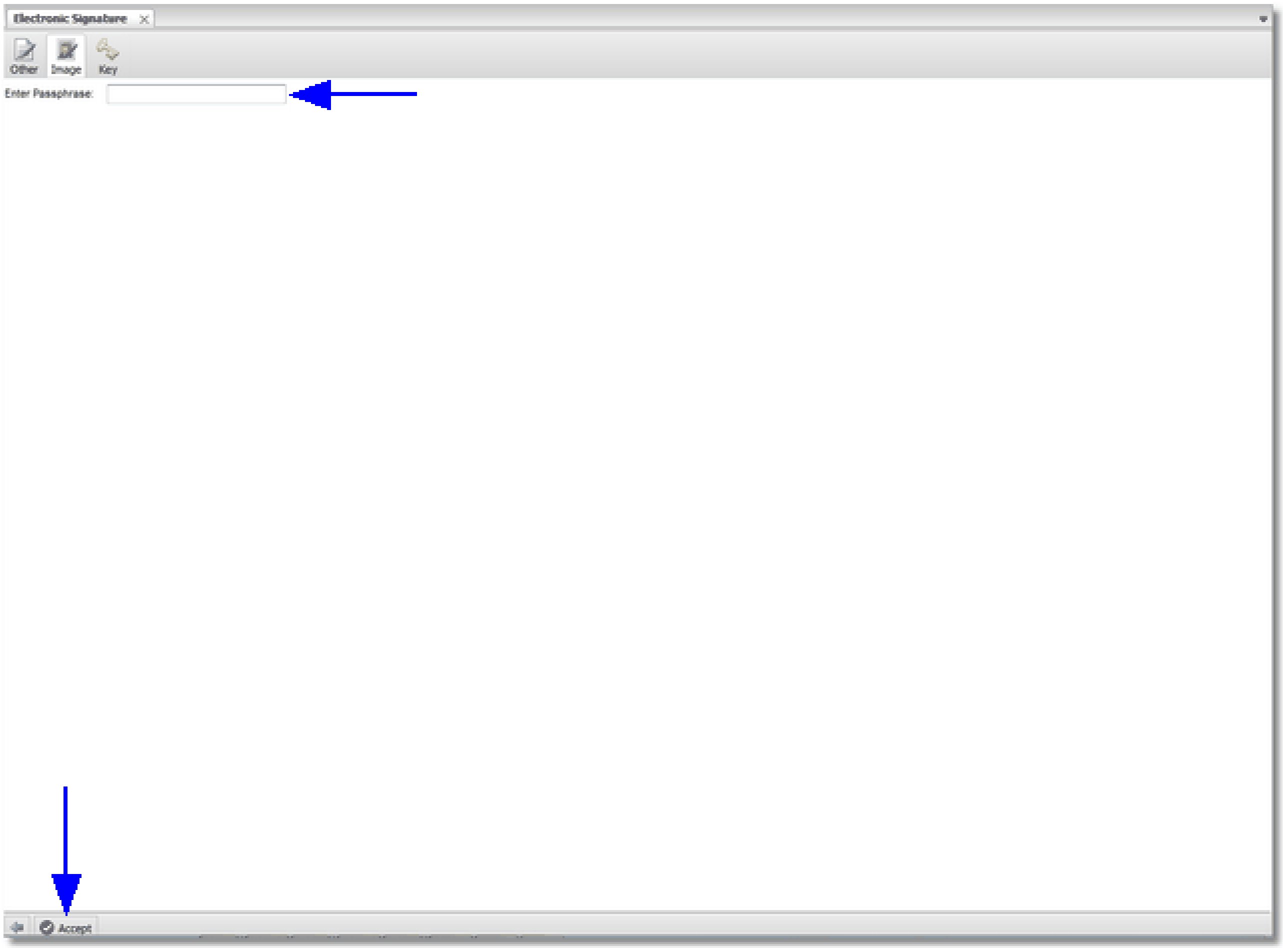


Figure 1.55 Electronic Signature - Passphrase

After the scanned document has been signed, it will no longer show in the employee or physician's E-Sign queue.

Electronic Signature for Images

To E-sign a scanned document using the Electronic Signature for Images option, follow the steps bellow:

Hospital Base Menu > Electronic Signature for Images

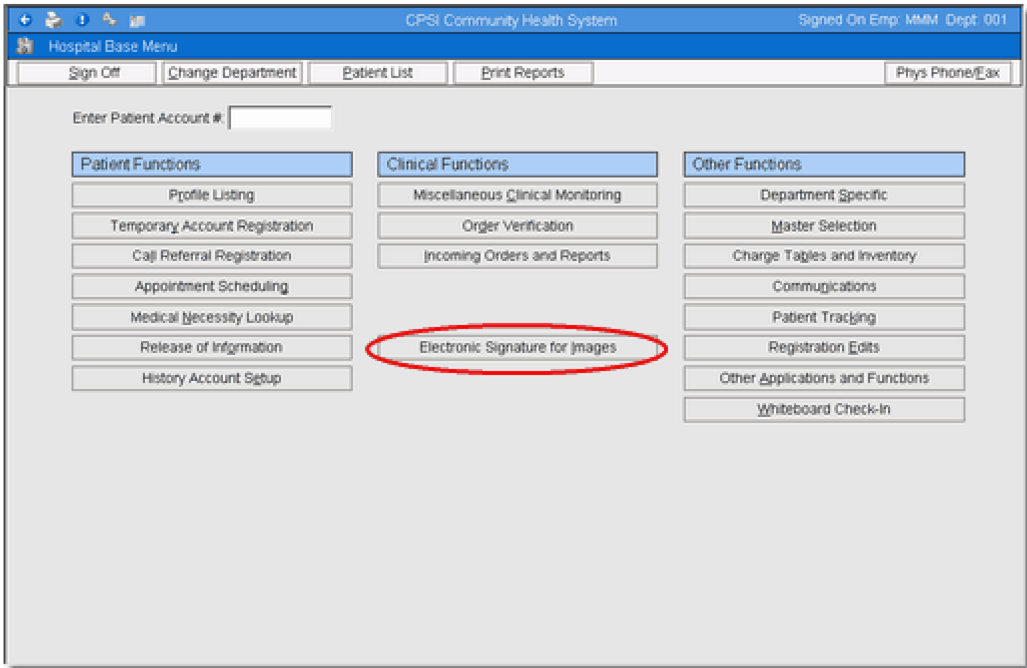


Figure 1.56 Electronic Signature for Images

Once Electronic Signature for Images has been selected, a list of scanned documents requiring e-signature will display. Select the scanned document to be e-signed.

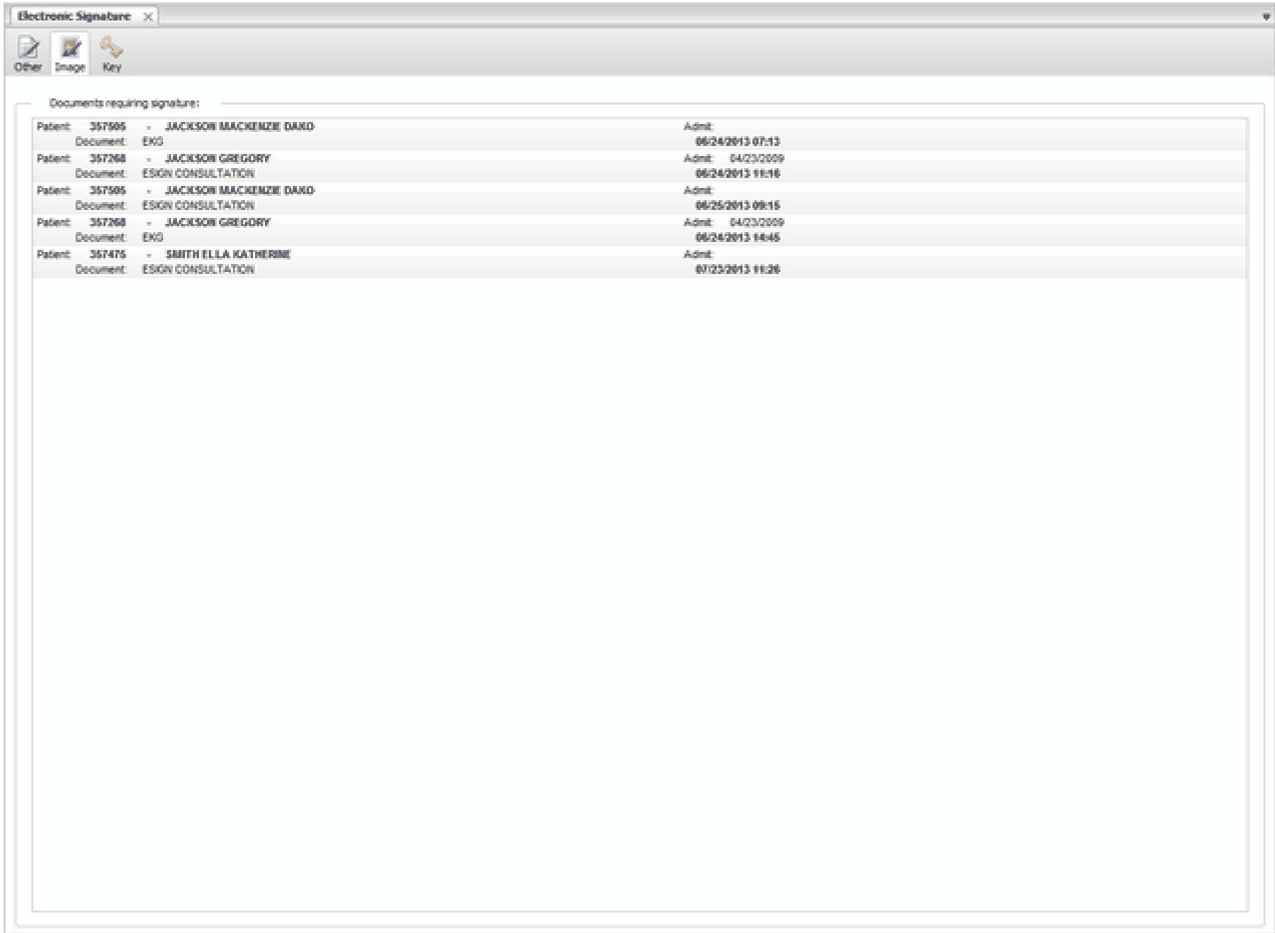


Figure 1.57 Assign Images to Sign Queues

The scanned document will be displayed on the screen. If the scanned document was sent in error, select Return to Assign Queue on the action bar to return the scanned document to the Assign Images to Sign Queues. Select **Sign** on the action bar to sign the scanned document.

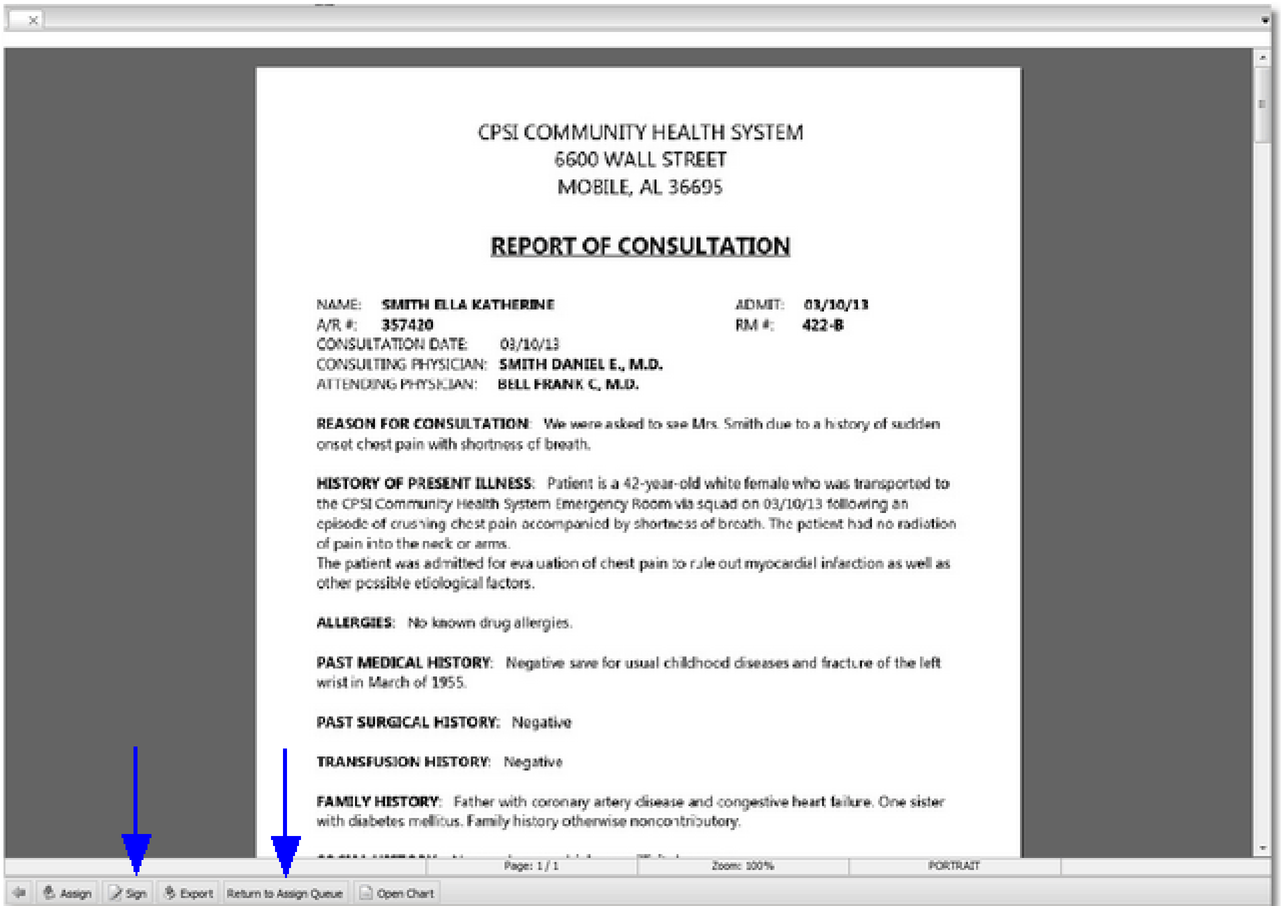


Figure 1.58 Assign Images to Sign Queues

The system will prompt to enter the Passphrase set up by the employee or physician. Type in the passphrase and hit the Enter key, then select **Accept** at the on the action bar.

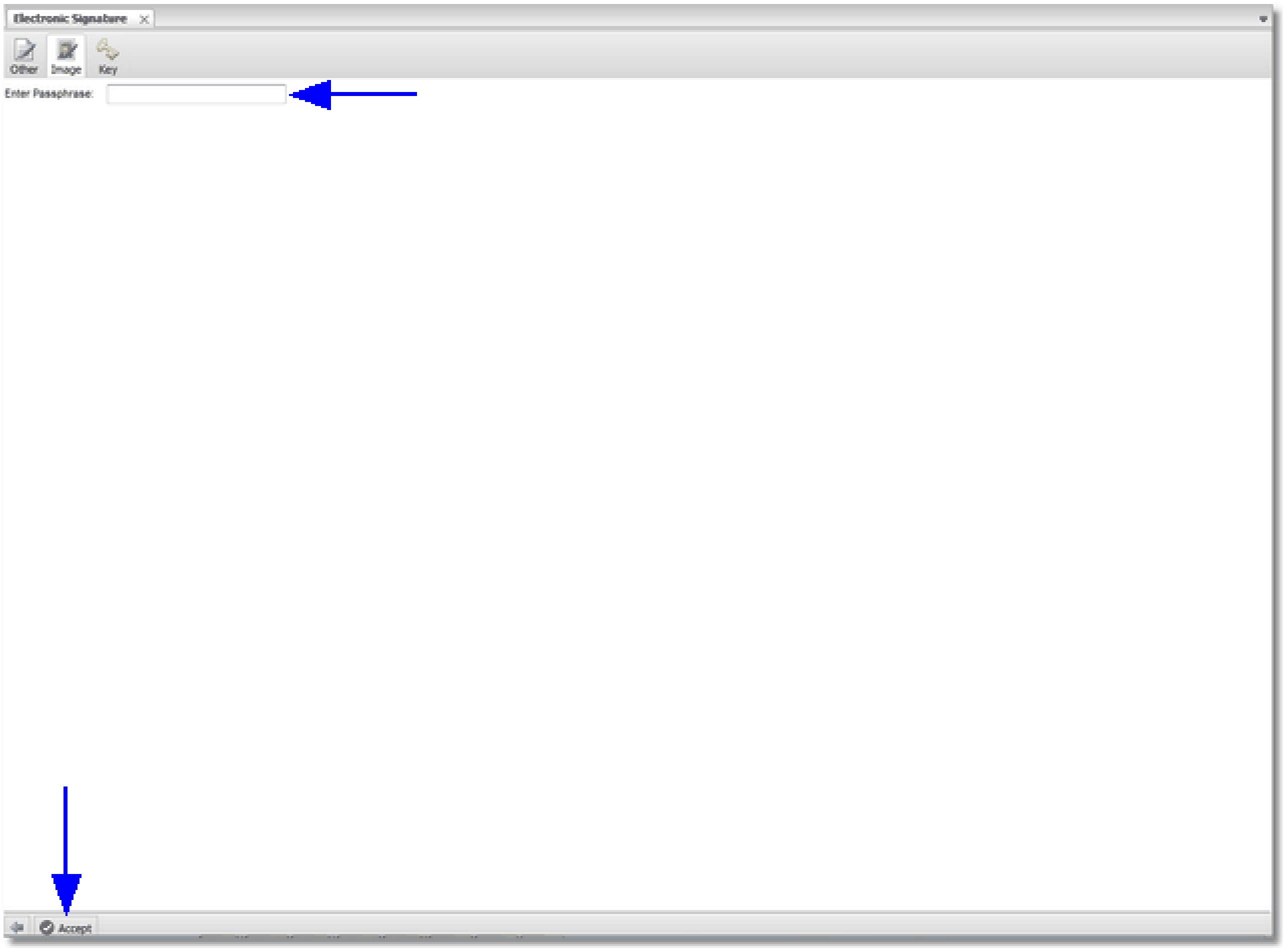


Figure 1.59 Electronic Signature - Passphrase

After the scanned document has been signed, it will no longer show in the employee or physician's E-Sign queue.

NOTE*: The Electronic Signature behavior control* ***AllowRememberPassphraseOneHour,*** *when set to allow, adds functionality in which the passphrase may be entered once during an electronic signature session. Once the passphrase is entered the system will hold the passphrase 60 minutes.*

Home Screen

There are two ways to access the Home Screen to e-sign a scanned document.

The first way to access the Home Screen to e-sign a scanned document is from ClientWare.

Hospital Base Menu > Master Selection > Medical Records > <u>Home Screen</u>

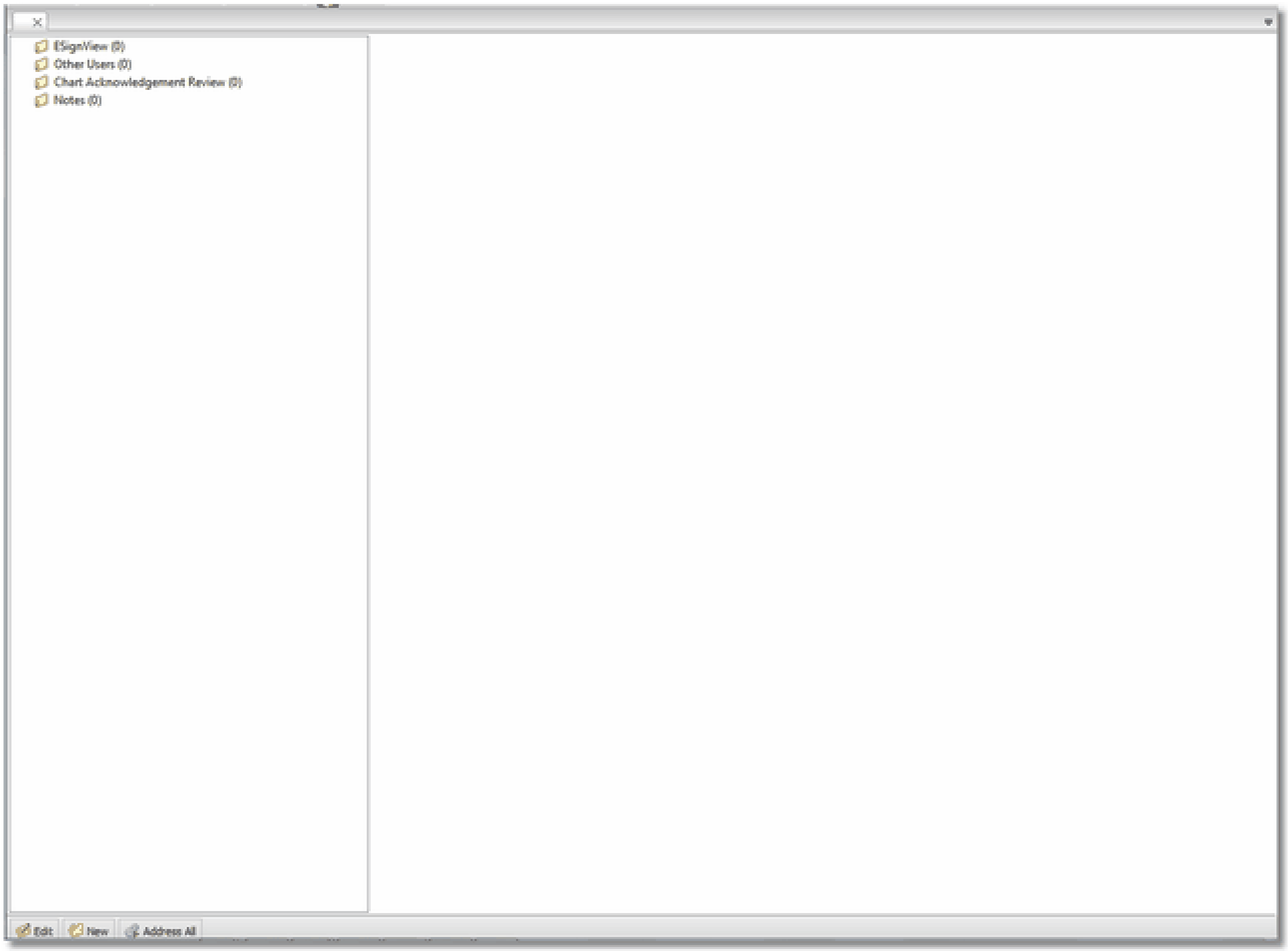


Figure 1.60 Home Screen

The second way to access the Home Screen to e-sign a scanned document is from ChartLink.

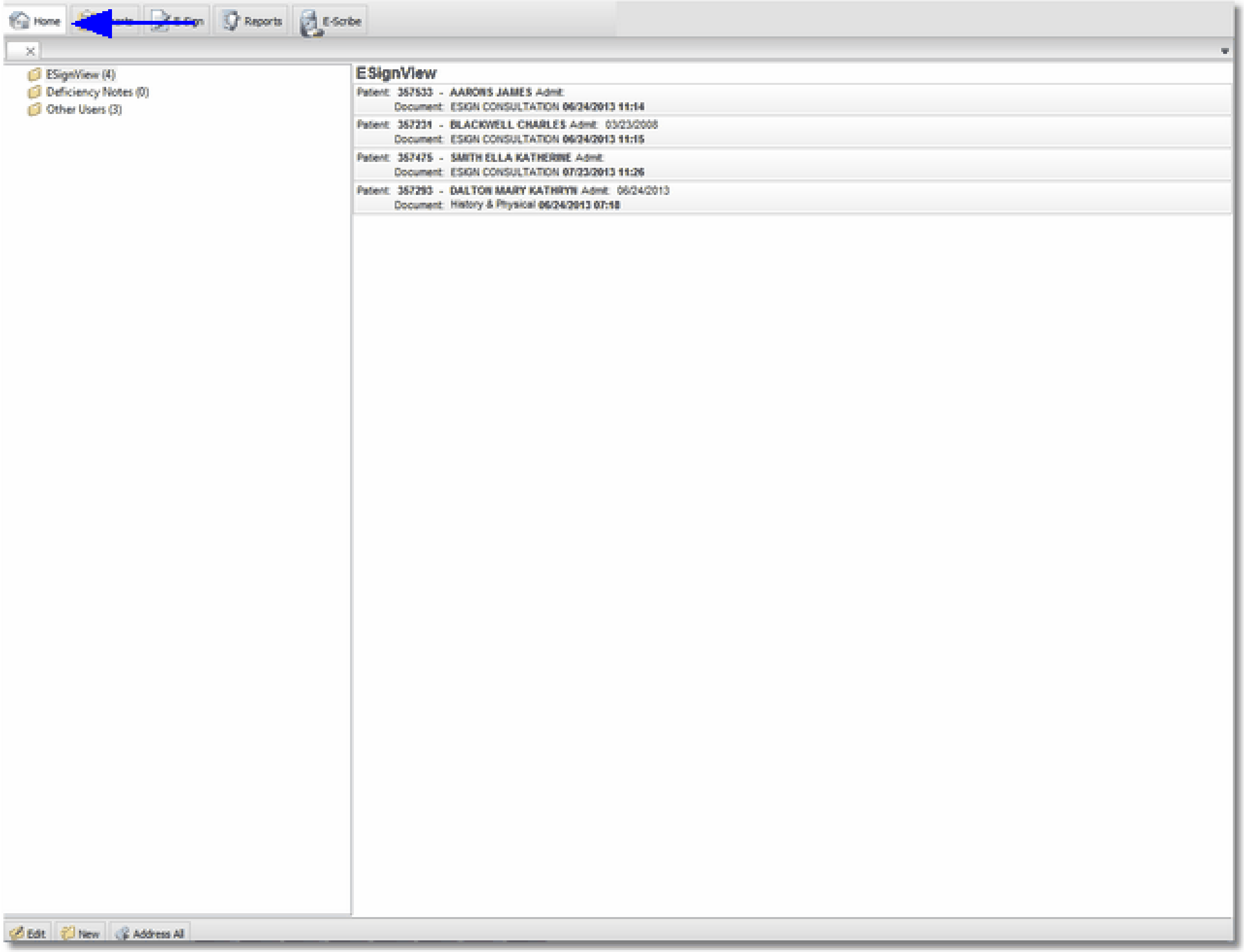


Figure 1.61 Home Screen

When scanned documents are assigned, employees and physicians will go to the **ESignView** folder on the Home Screen to see the scanned documents that were assigned to them. The process to E-sign a scanned documents using the Home Screen is the same regardless to how the Home Screen is accessed.

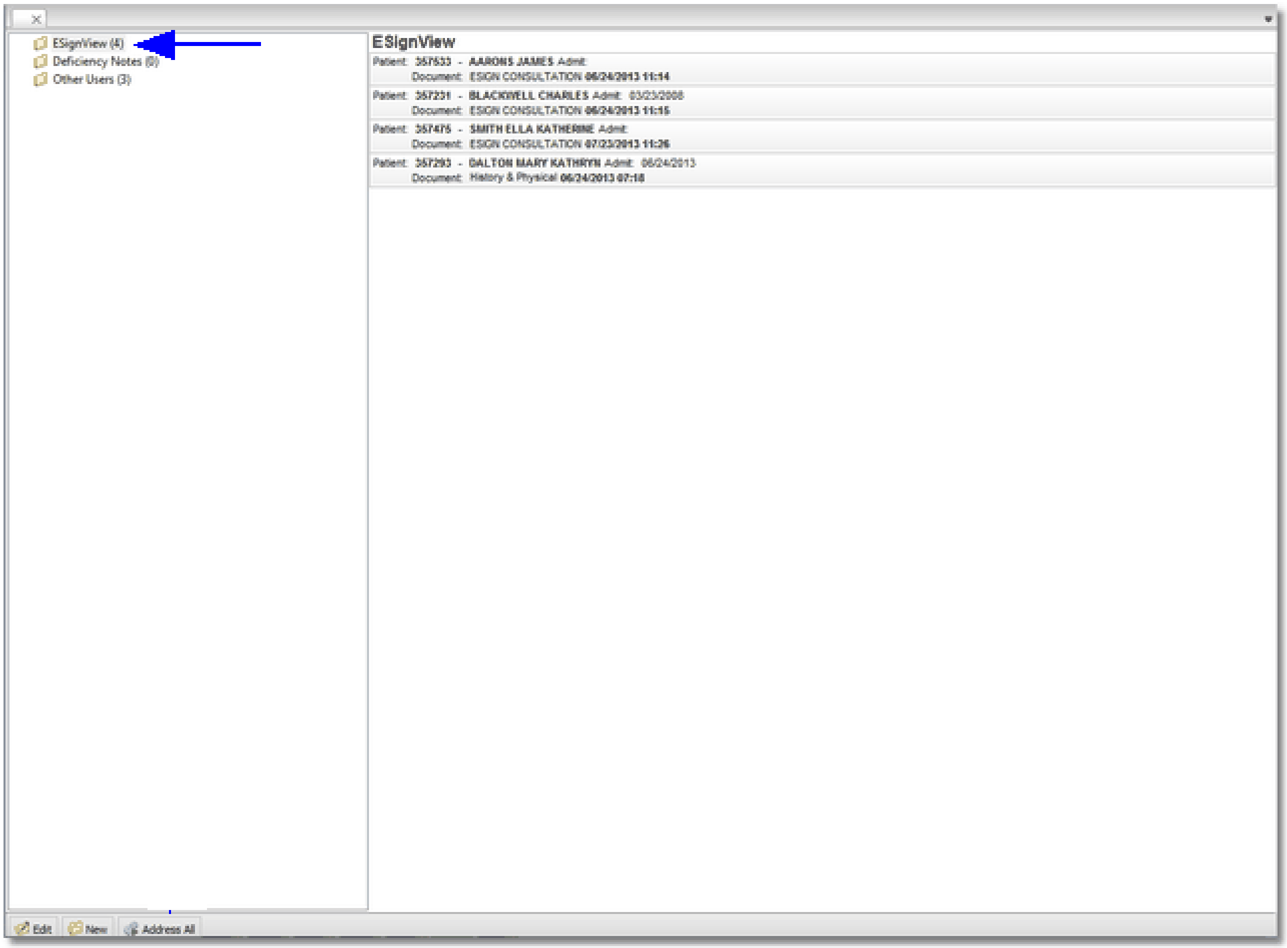


Figure 1.62 Home Screen

The **Address All** option may be selected to sign all scanned documents listed.

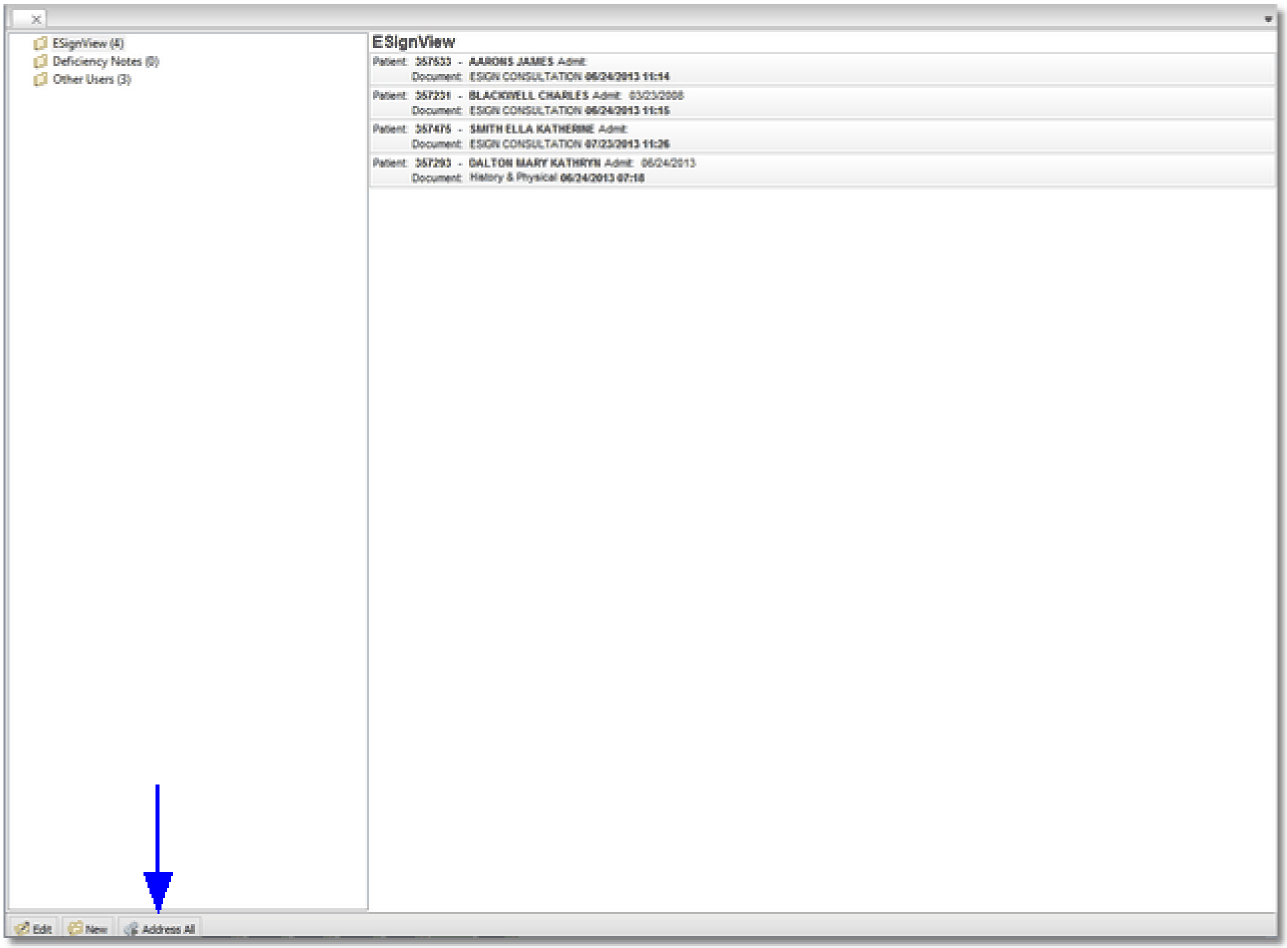


Figure 1.63 Home Screen

Multiple scanned documents may be selected to sign by holding down the Ctrl key and selecting the desired scanned documents. Once all the scanned documents have been selected, the Address All option will then change to Address Selected. Select **Address Selected** to sign the documents.

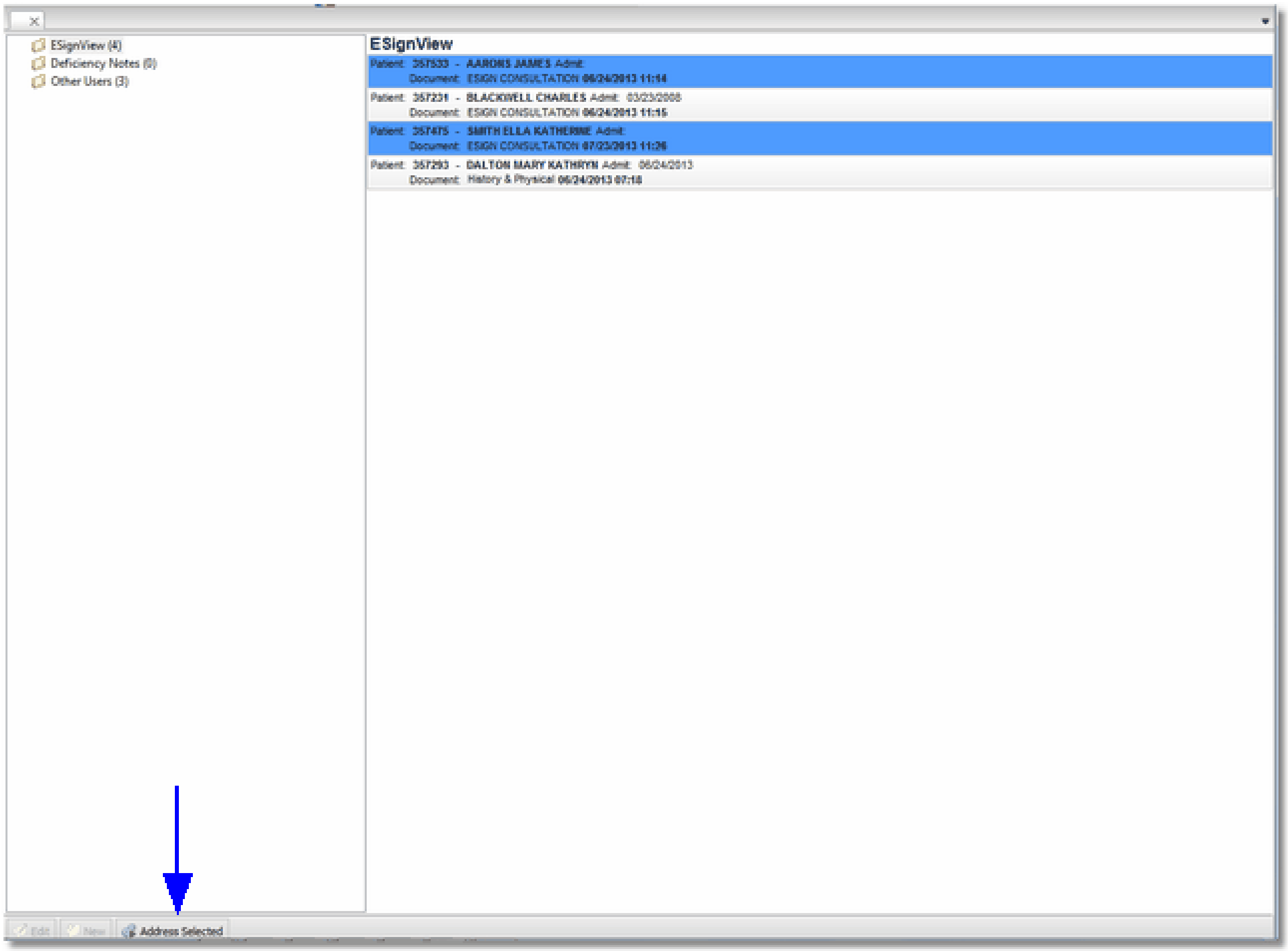


Figure 1.64 Home Screen

To sign one scanned document at a time, select the scanned document to be e-signed. The scanned document will be displayed on the screen. If the scanned document was sent in error, select Return to Assign Queue on the action bar to return the scanned document to the Assign Images to Sign Queues. Select **Sign** on the action bar to sign the scanned document.

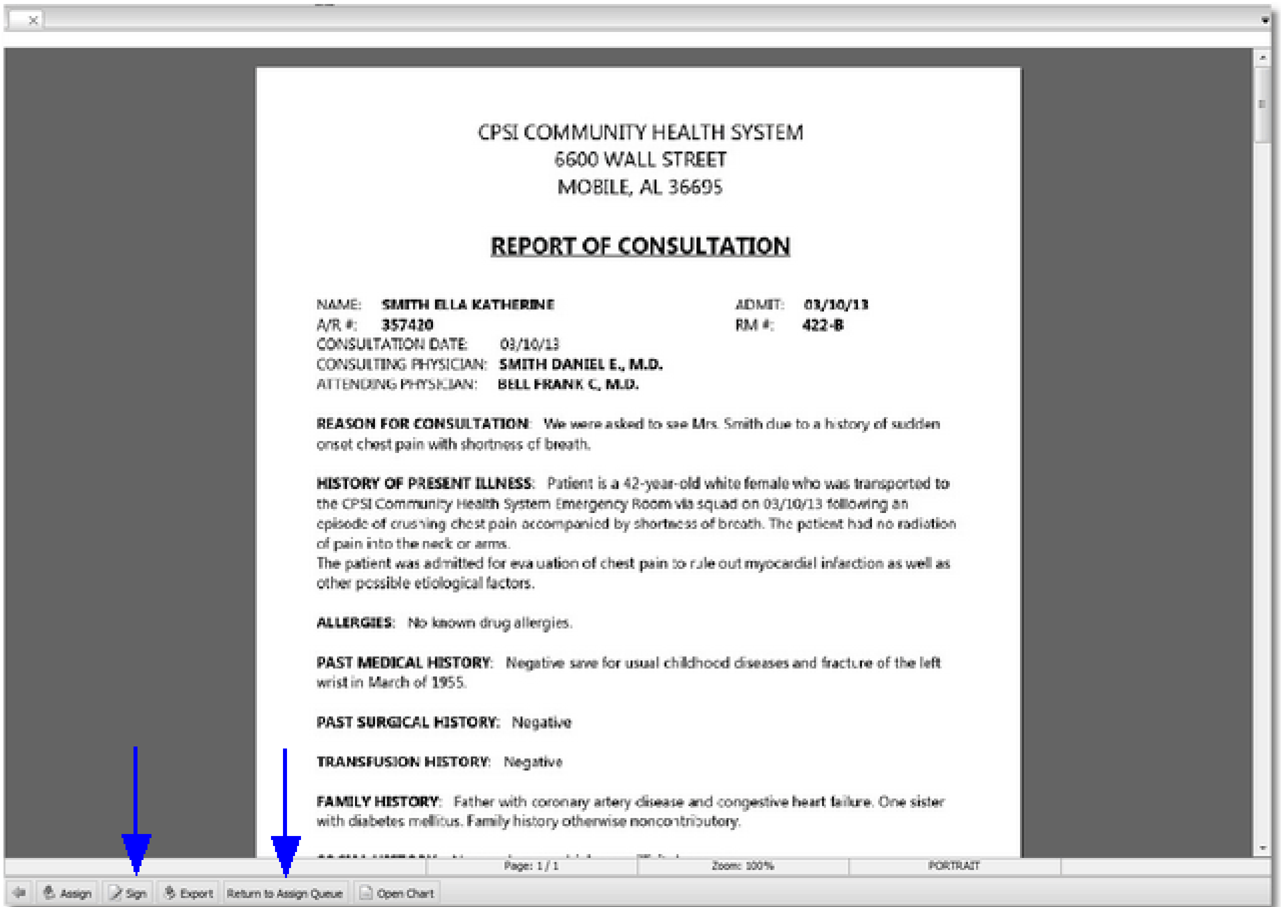


Figure 1.65 Assign Images to Sign Queues

The system will prompt to enter the Passphrase set up by the employee or physician. Type in the passphrase and hit the Enter key, then select **Accept** at the on the action bar.

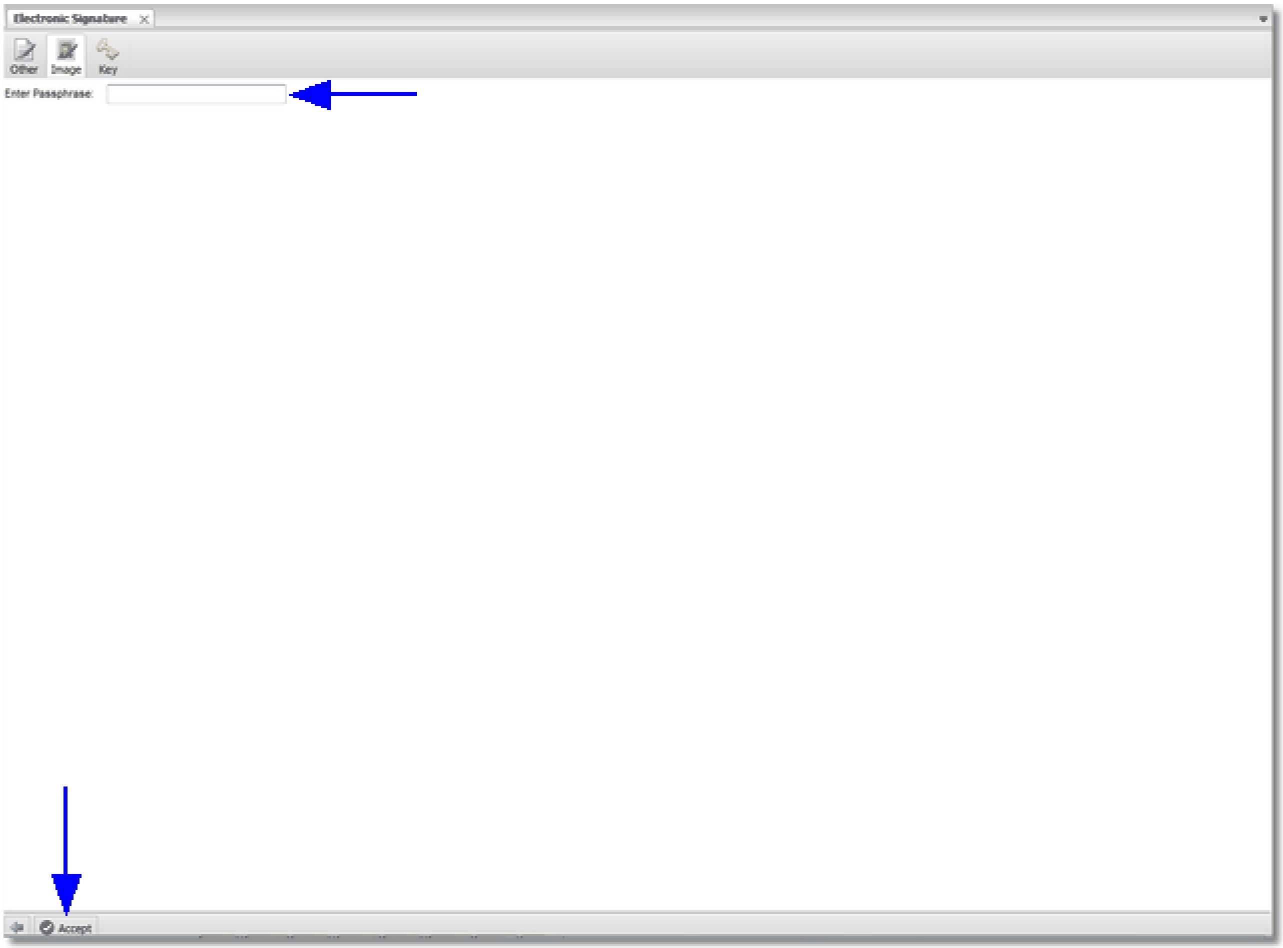


Figure 1.66 Electronic Signature - Passphrase

After the scanned document has been signed, it will no longer show in the employee or physician's E-Sign queue.

Signing for Other Physicians

The ability exists for a physician to electronically sign scanned documents for another physician. To do this, the Physician Security Table, page two **Authorized to Sign Documents for** field must be set appropriately.

Select **Special Functions** > **System Management** > **System Security** > **Physician Security** > **PgDn**

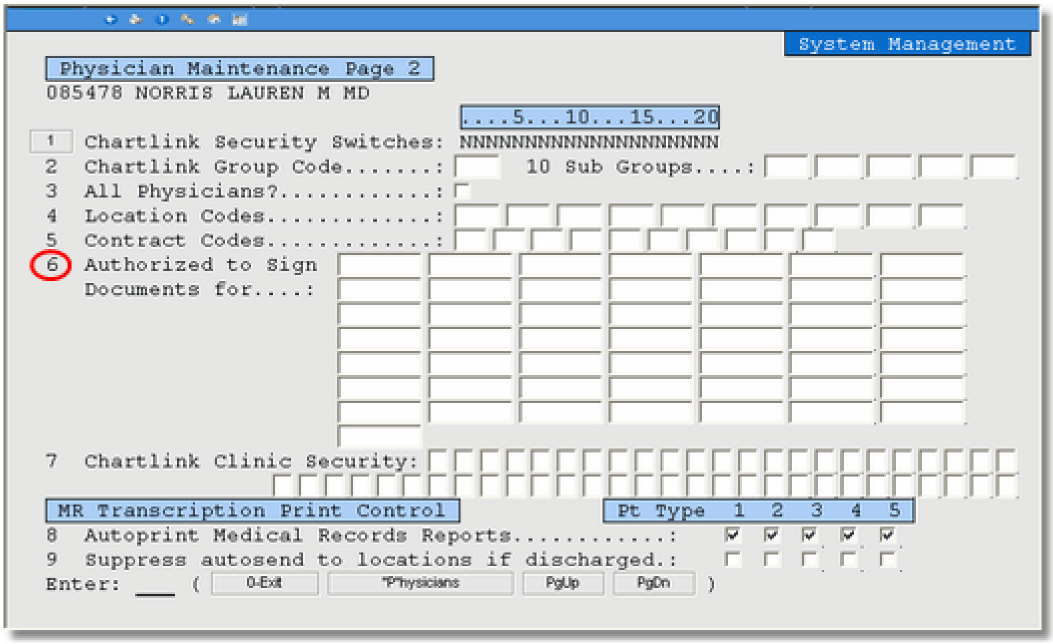


Figure 1.67 System Management Physician Maintenance, Page 2

Select **Authorized to Sign Documents for** and enter the physician numbers for which this physician may sign scanned documents. The daily password will be required to enter information in this field.

From the Home Screen, select the **Other Users** folder. After selecting the Other Users folder, select the scanned documents to sign.

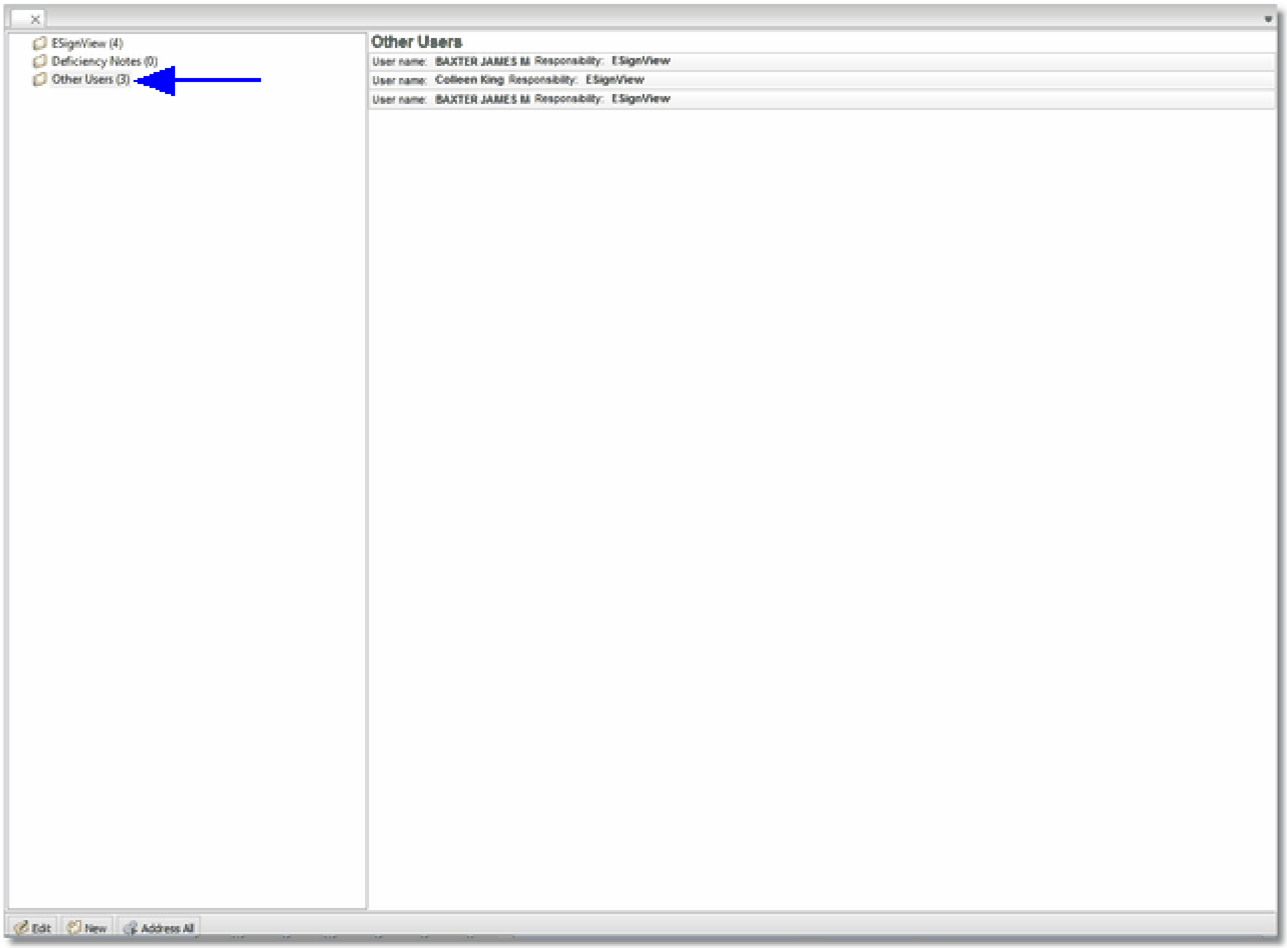


Figure 1.68 Home Screen

NOTE: *Please refer to JCAHO standards and CMS Conditions of Participation for guidelines on the circumstances and mechanisms under which one Licensed Practitioner could authenticate for another Licensed Practitioner.*

Viewing a Signed Scanned Document

To view the electronically signed scanned document, access Electronic File Management on the patient's account and select the document. The electronic signature will display at the bottom of each page of the document, along with the date and time it was signed.

Select **Hospital Base Menu** > **Patient Account #** > **<u>Electronic File Management</u>**

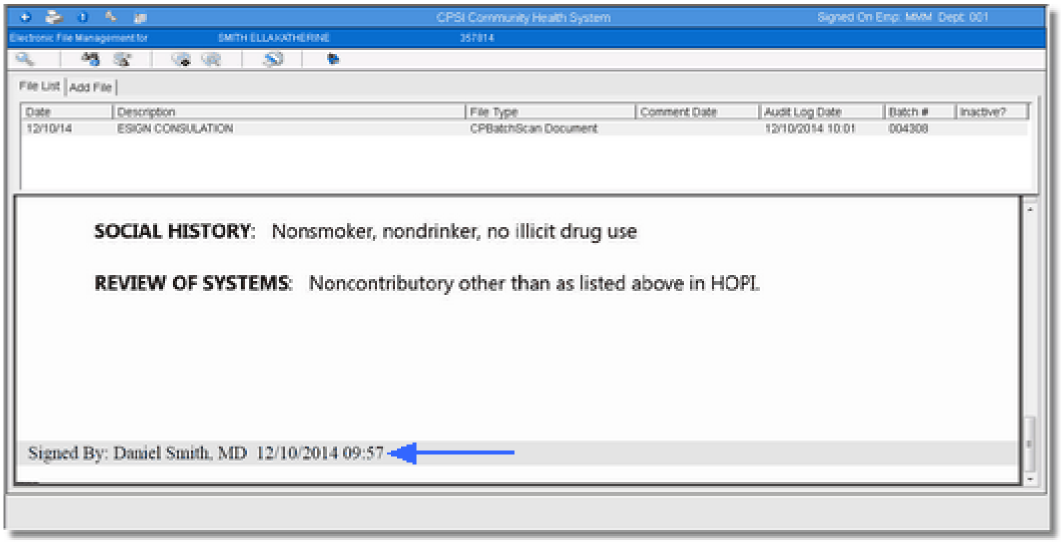


Figure 1.69 Electronic File Management

NOTE: *The Electronic File Management Audit Log will be updated when a document is signed with the date, time and the signing employee or physician's name.*

Once a document has been signed all versions of the document may be viewed or printed. When the signed document is selected the  Version icon will become active. Selecting the  Version icon will display all versions of the document.

Select **Hospital Base Menu** > **Patient Account #** > **Electronic File Management**

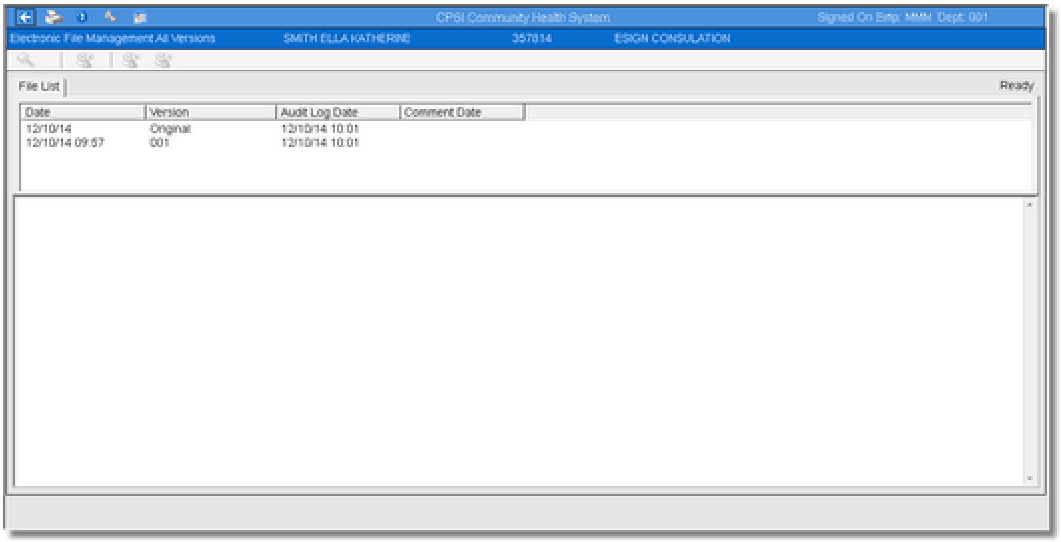


Figure 1.70 Electronic File Management

- **Date:** This is the date the original document was attached to the account or the date and time the other versions of the document were signed.
- **Version:** This is the version of the document.
- **Audit Log Date:** This is the audit log date and time.
- **Comment Date:** This is the date the comment was placed on the document.

Notes

The Notes option in the Assign Images to Sign Queues may be used as a form of communication between an employee and a physician.

Sending a Note

Select **Assign Images to Sign Queues** to send a note.

Hospital Base Menu > Master Selection > Assign Images to Sign Queues

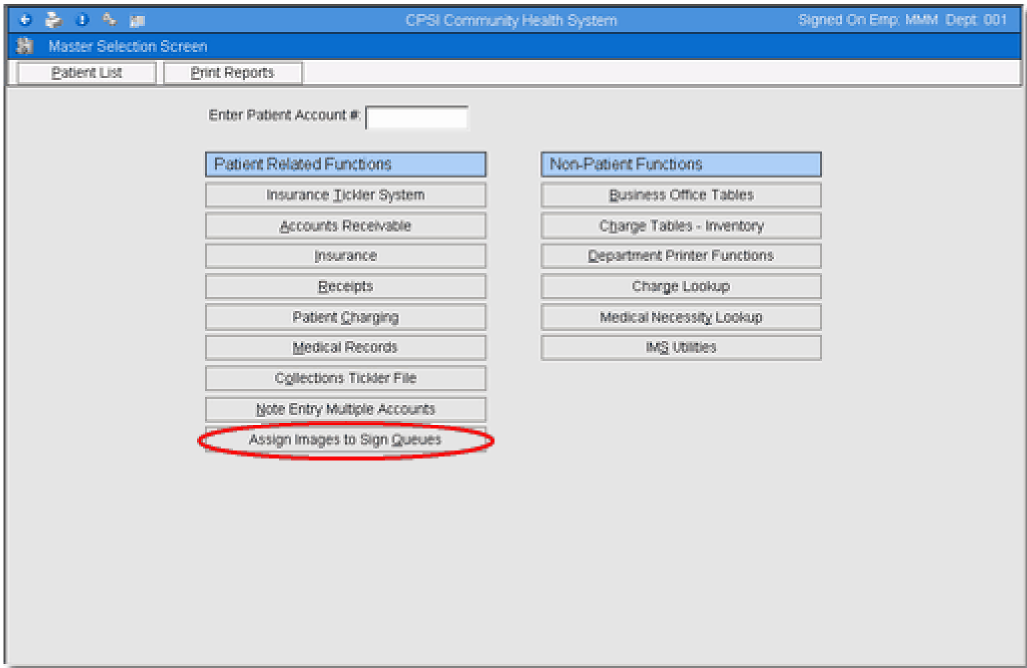


Figure 1.71 Assign Images to Sign Queues

To send a Notes to a physician, select the scanned document.

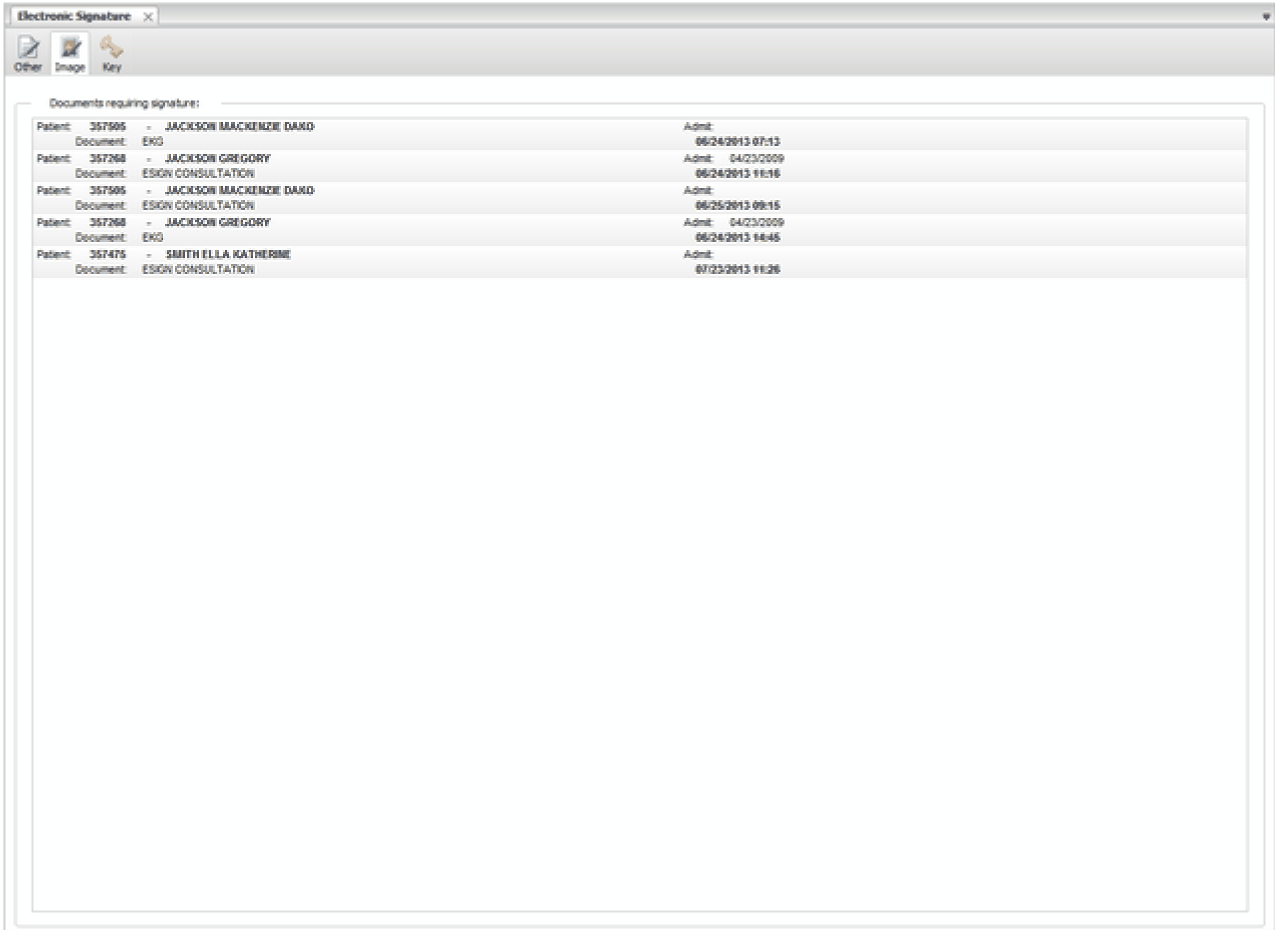


Figure 1.72 Assign Images to Sign Queues

Once the scanned document displays, select **Note** on the action bar to display a list of all employee and physician User Based Logins currently setup in the system. An employee or physician's first or last name may be entered into the Search field to delimit the list of User Base Logins. The Search Type drop-down box may be used to search for employees or physicians by Employee ID, Log Name, Name or Physician ID. The default is to search by Name.

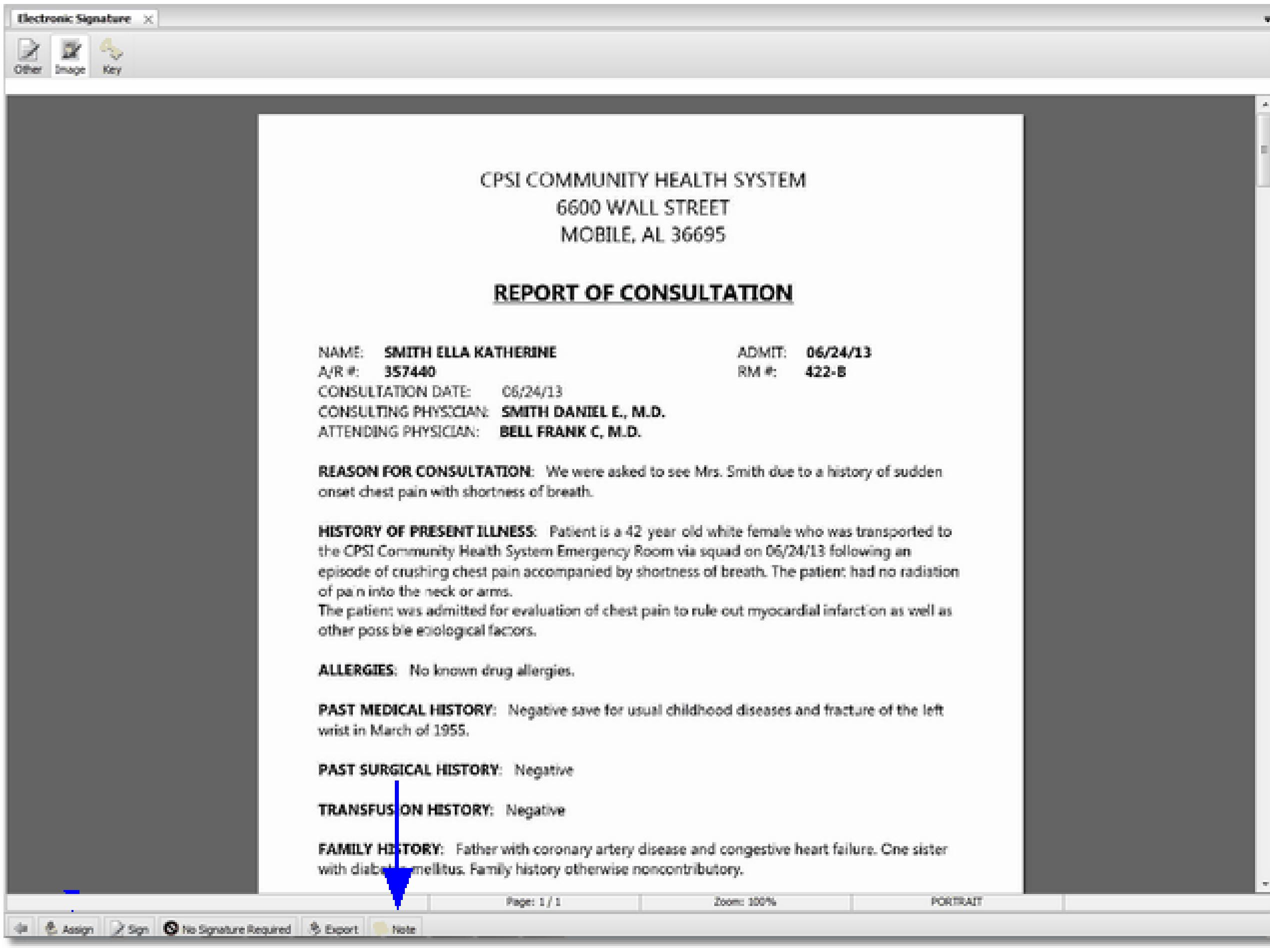


Figure 1.73 Assign Images to Sign Queues

Once the name of the employee or physician has been located, select the correct User Based Login and then select **OK** on the action bar.

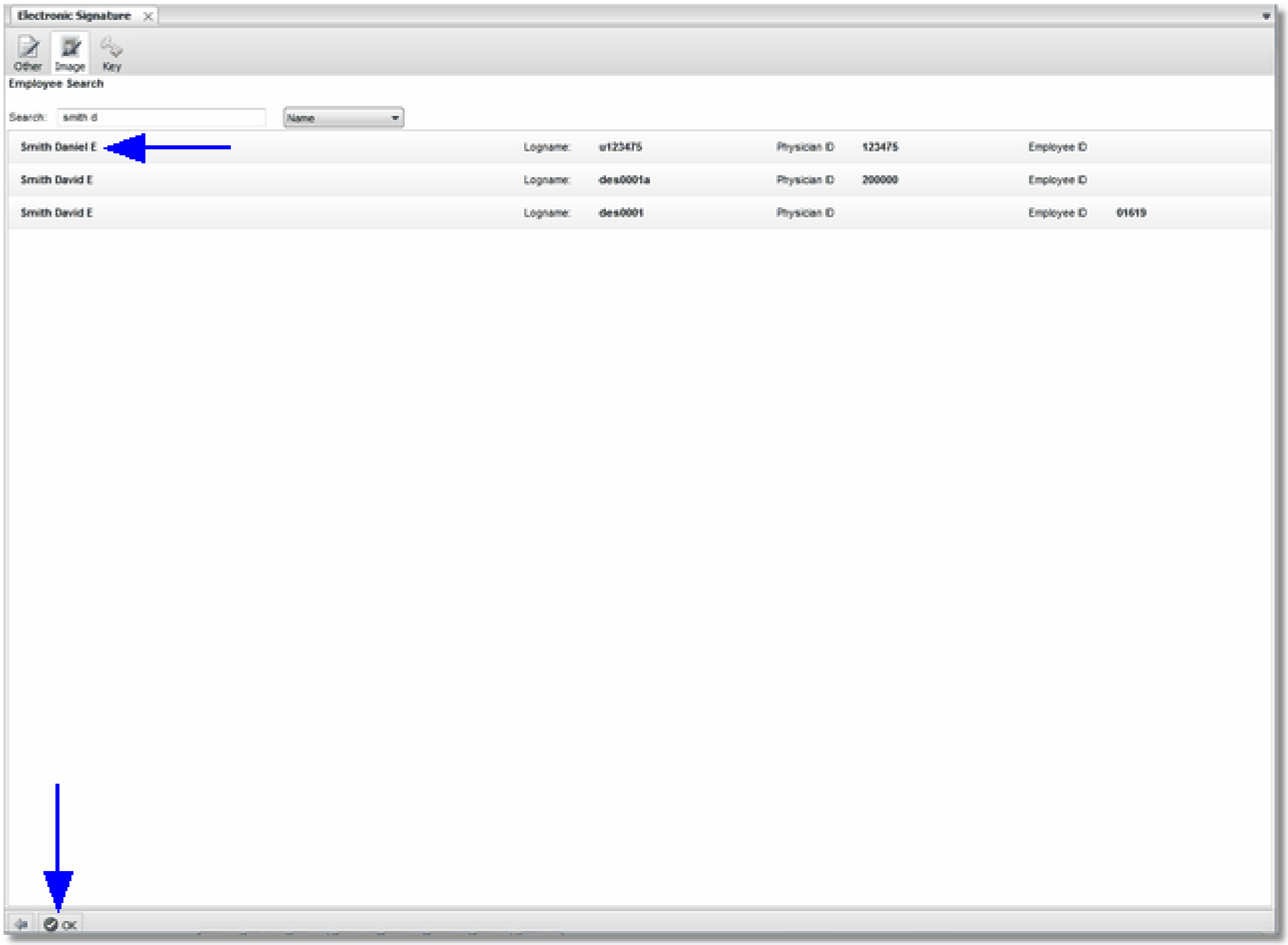


Figure 1.74 Assign Images to Sign Queues

Enter the contents of the note. Select View Attachment to view the scanned document attached to the note. Select **Send** once the note is complete.

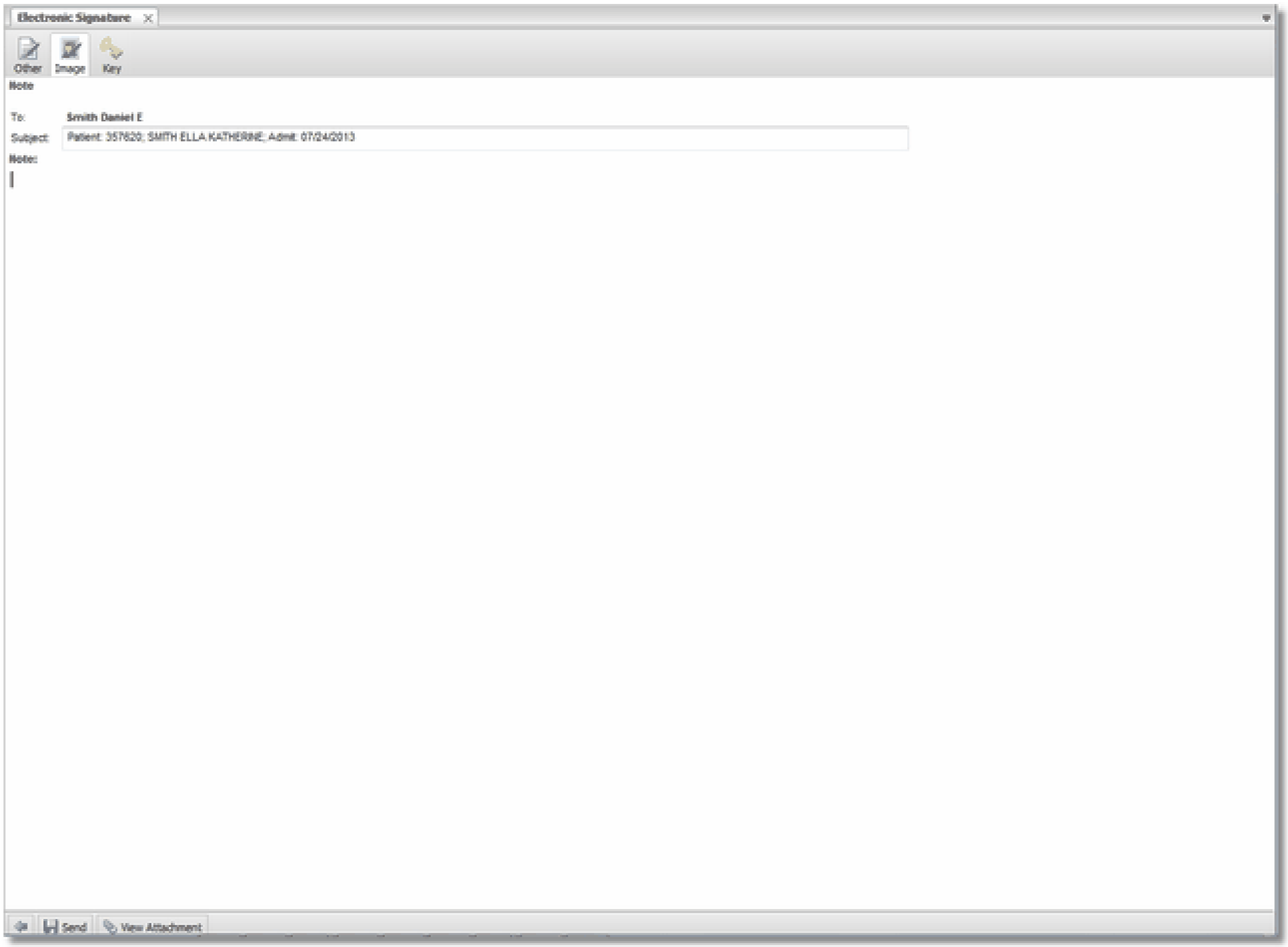


Figure 1.75 Assign Images to Sign Queues

The document will be sent to the employee or physician's Personal Inbox.

Viewing a Note

A note may be viewed from the Personal Inbox located on the Home Screen. There are two ways to access the Home Screen to view a note.

The first way to access the Home Screen to view a note is from ClientWare.

Hospital Base Menu > Master Selection > Medical Records > <u>Home Screen</u>

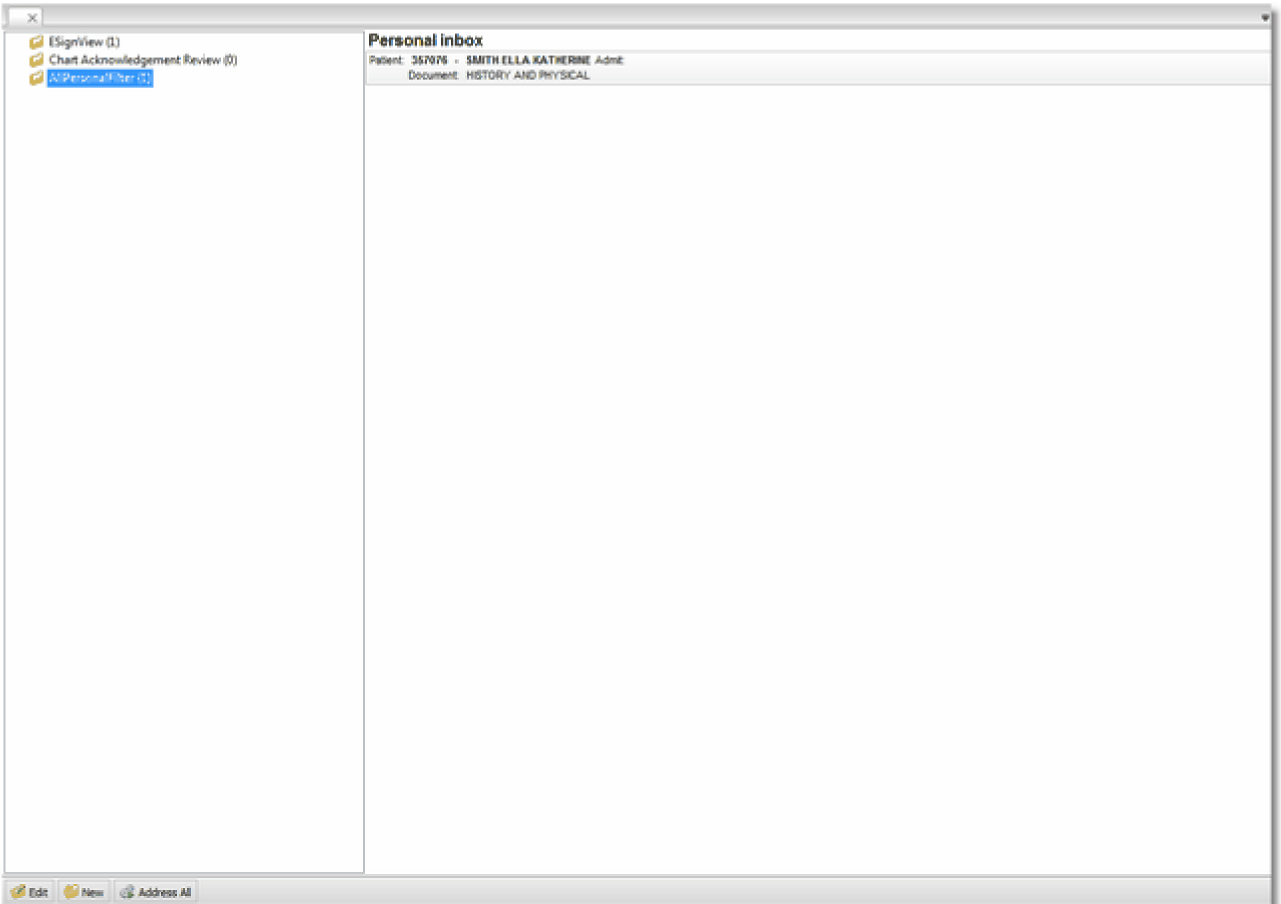


Figure 1.76 Home Screen

The second way to access the Home Screen to view a note is from ChartLink.

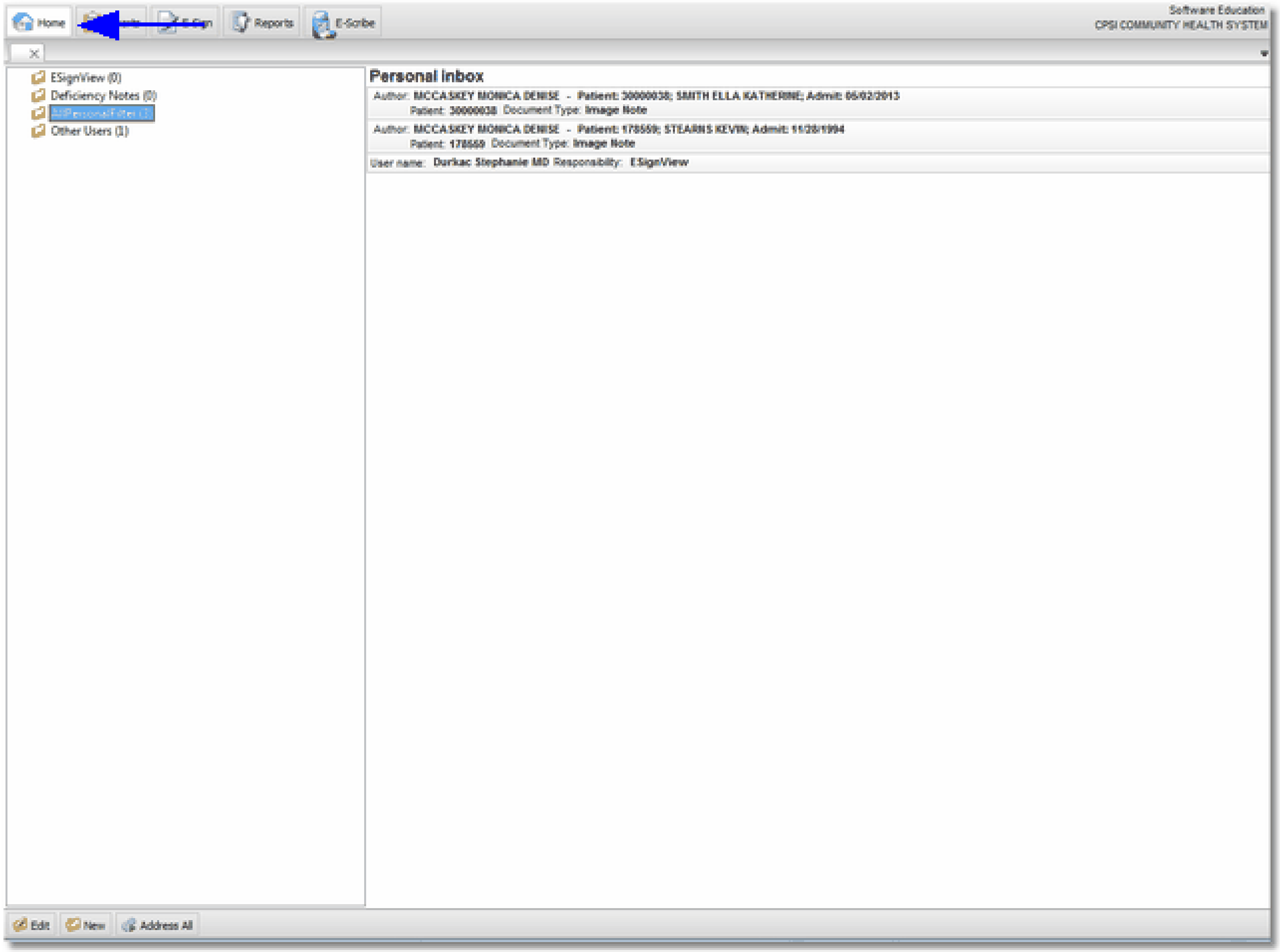


Figure 1.77 Home Screen

The **AllPersonalFilters** (**Personal Inbox)** folder located on the Home Screen is where an employee or physician may view notes. The process to view a note from the Home Screen is the same regardless to how the Home Screen is accessed.

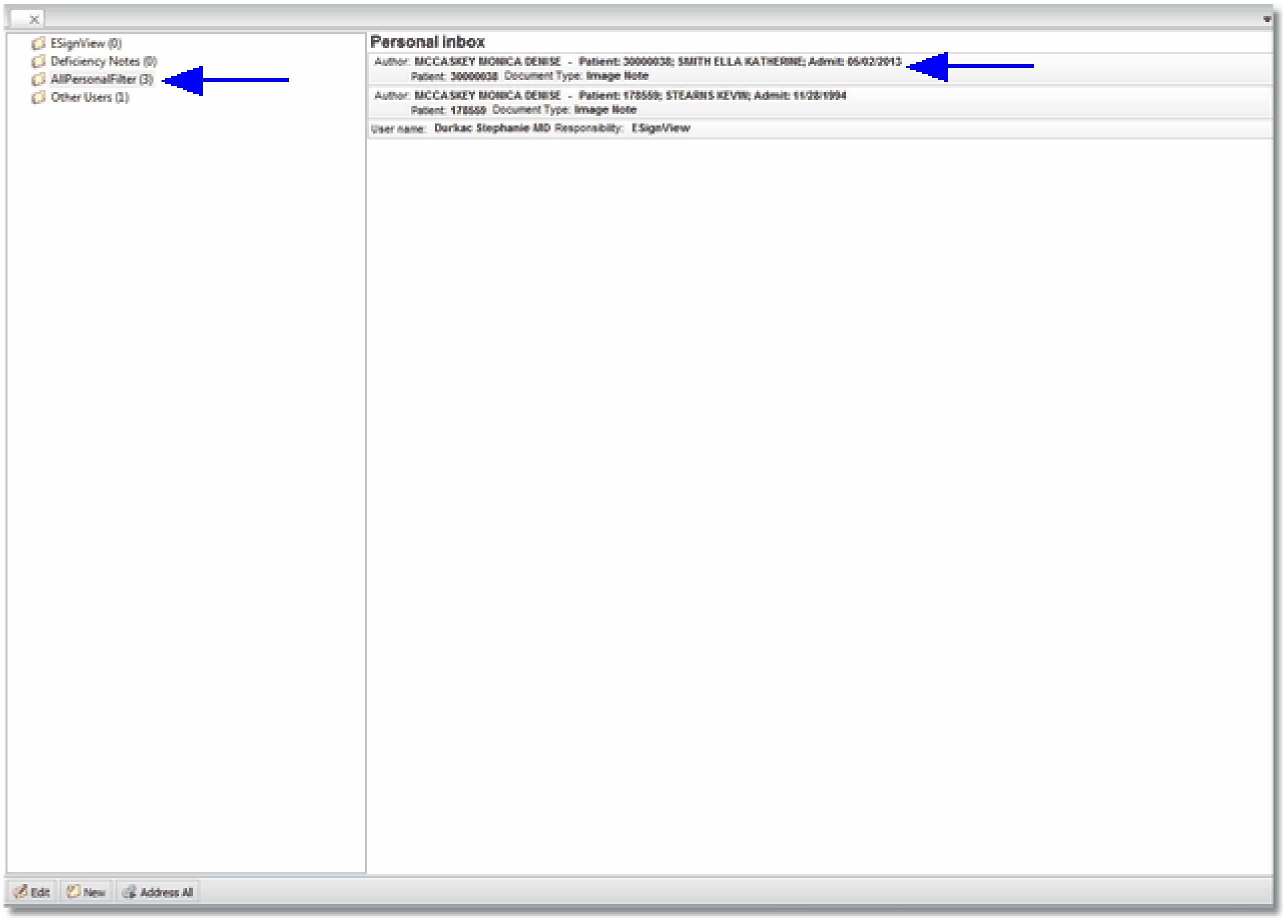


Figure 1.78 Home Screen

The **Address All** option may be selected to address all notes listed.

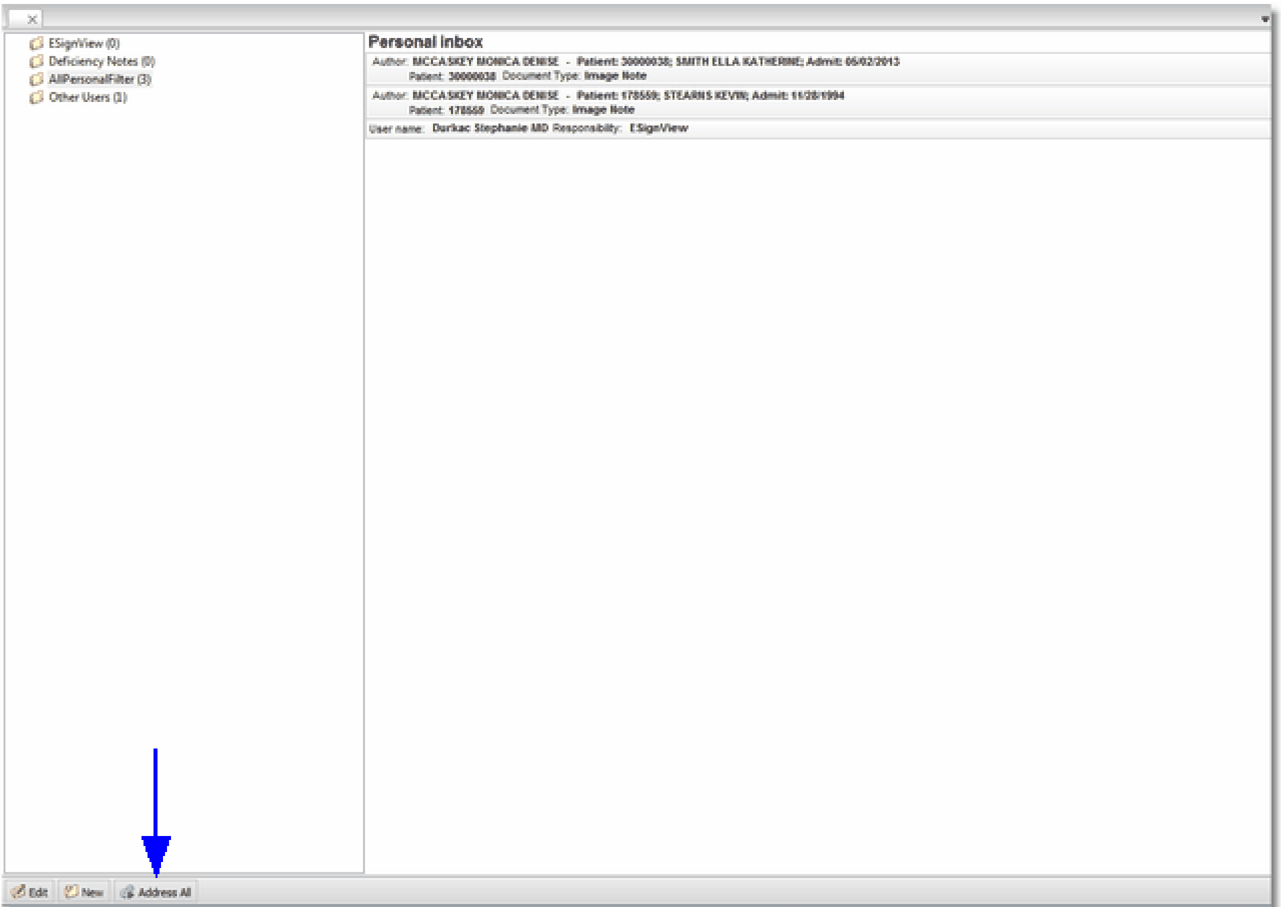


Figure 1.79 Home Screen

Multiple notes may be selected by holding down the Ctrl key and selecting the desired notes. Once all the notes have been selected, the Address All option will then change to Address Selected. Select **Address Selected** to view the notes.

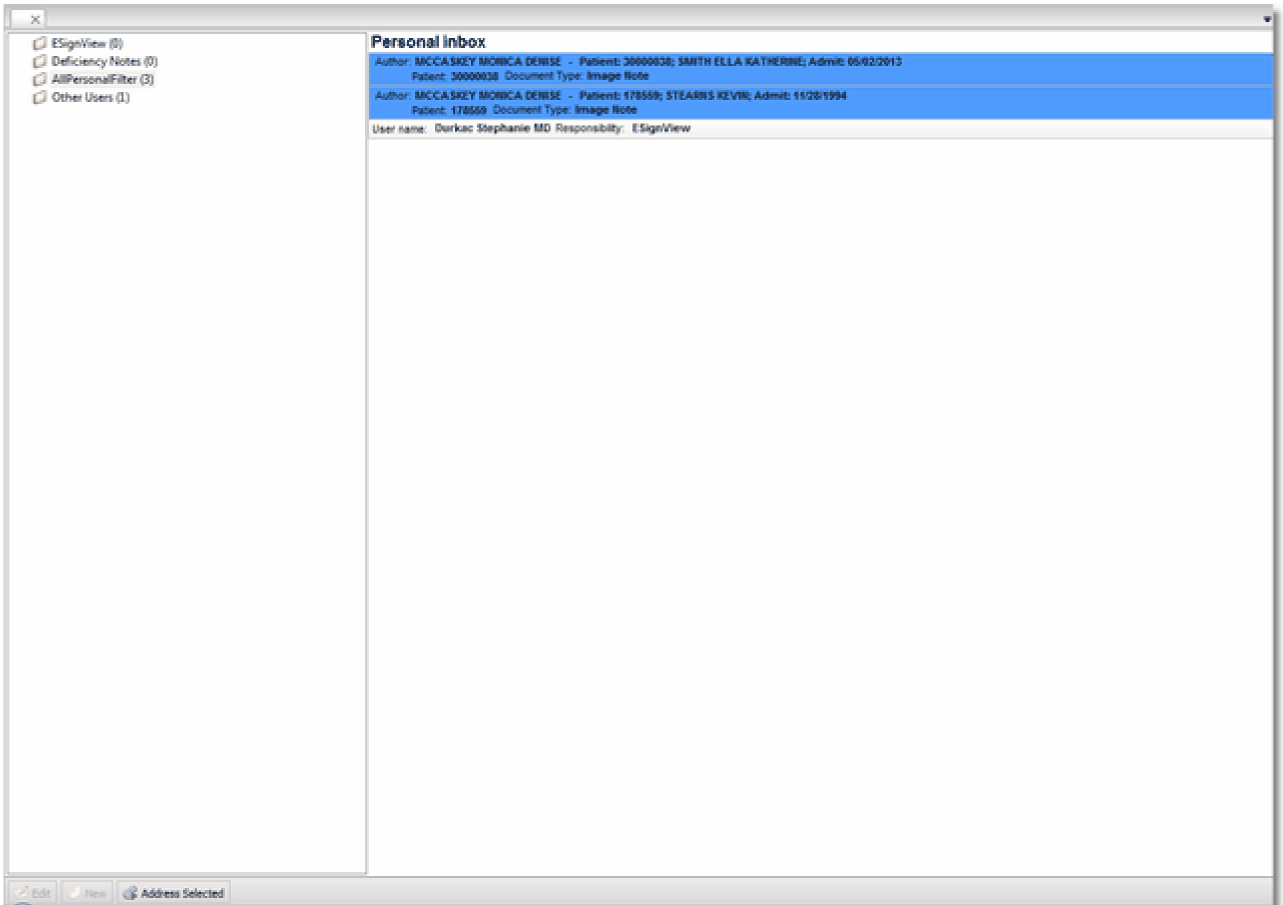


Figure 1.80 Home Screen

To view one note at a time, select the note.

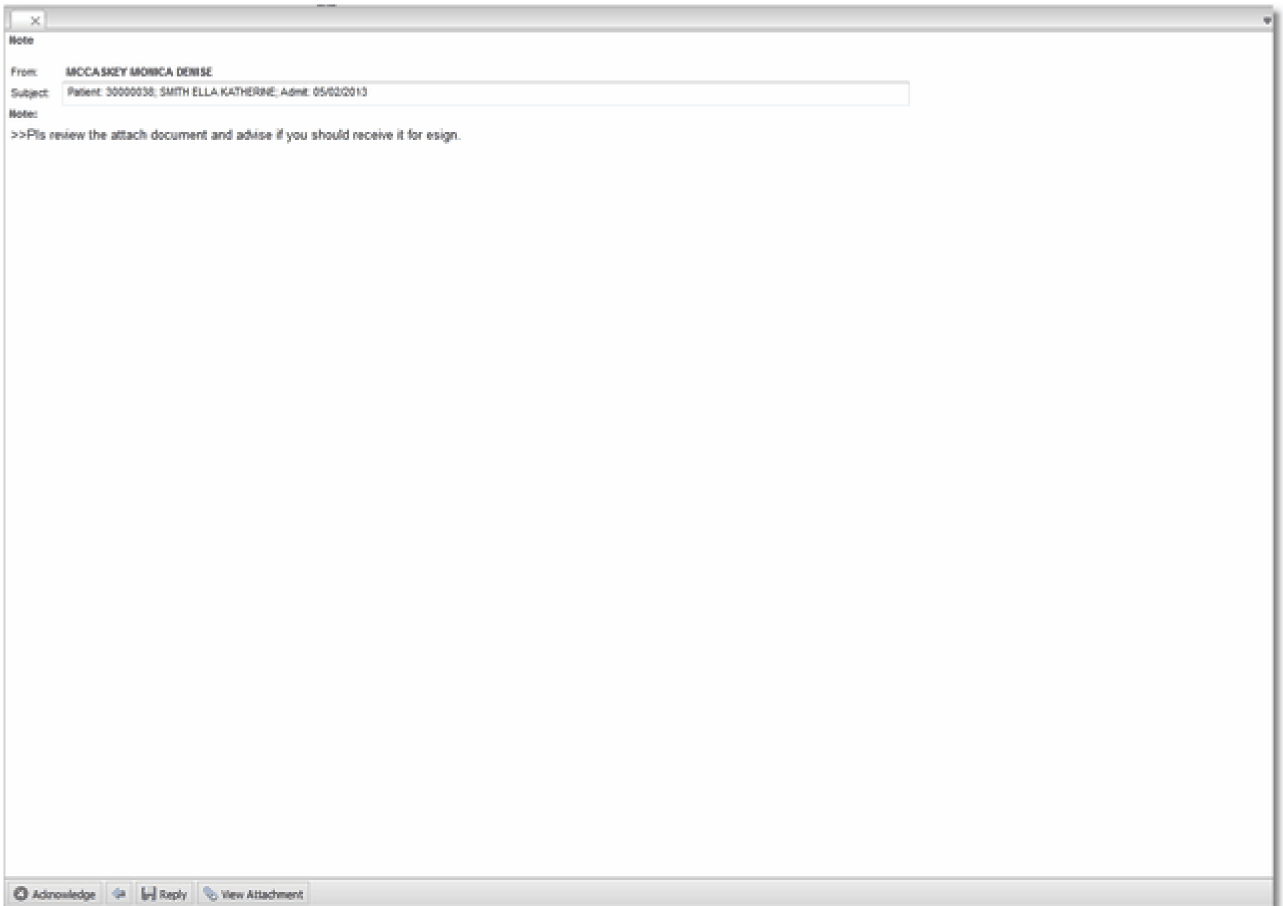


Figure 1.81 Assign Images to Sign Queues

The selected note will display different options on the action bar:

- **Acknowledge:** When this option is selected, it will allow an employee or physician to acknowledge viewing and reading the note. An acknowledge note will be sent to the Chart Review folder of the sender of the note.

-  **:** When this option is selected, it will go back to the previous screen to show the listing of notes.

- **Reply:** When this option is selected, it will allow an employee or physician the ability to send a reply to the sender of the note.

- **View Attachment:** When this option is selected, it will allow the employee or physician the opportunity to view the attached scanned document.

Reports

Images Within a Date Range

The Images within a Date Range report will give a listing of all image titles that were scanned onto a patient's account within a date range.

How to Print

1. Select **Print Reports** from the Hospital Base Menu or the Master Selection screen.

2. Select **Medical Records.**

3. Select **Admin**.

4. Select **Images within a Date Range.**

5. Select a print option.

6. Select a date range from the drop down.

7. Select **Generate** to display all patient accounts within the selected date range.

8. Highlight a line and select **Remove from List**, if a particular patient account needs to be excluded from the report.

9. Select **Print** to continue.

Description

The Images within a Date Range report will identify all images and documents that were placed on a patient's account within a date range. Before printing the report, it can be sorted by each column by selecting the column header. Certain lines can be removed from the report before it is printed.

Images within a Date Range

RUN DATE.: 06/02/11 CPSI Community Health System PAGE: 1
RUN TIME.: 12:14 EFM DOCUMENTS WITHIN A DATE RANGE REPORT OSIMAGEX1LIST
From 05/01/11 thru 05/31/11

Account	Patient Name	Date	Title	Doc. Ext.	File Type	Doc. Type	/od?	Image Number	Just-Like Number
10000350	HOLBERG CINDY	05/02/11	Photo Identification		CPScan Document		01	007287	
10006307	SMITH ELLA KATHERINE	05/06/11	Patient Summary	cda	Clinical Document Arch.	A	01	007407	
11000689	NEWTON TRENT K	05/31/11	Insurance Card	jpg	JPEG Image	A	01	008001	
11100200	HENDERSON TERESA H	05/13/11	ChartLink Photo		CPScan Document		01	007624	
15441544	GIBSON CONRAD G	05/04/11	Scan Document	cda	Clinical Document Arch.	A	01	007357	
20172522	HIRSCH MARCUS	05/19/11	UPLOADED IMAGE	jpg	JPEG Image	U	01	007757	
21001890	GARLAND DEBBIE	05/16/11	Chartlink Photo		CPScan Document		01	007683	
21001891	RICHARDS DANIEL L	05/16/11	ChartLink Photo		CPScan Document		01	007684	
21002029	CRANE DENISE	05/25/11	Chartlink Photo	jpg	JPEG Image	U	01	007866	
21002030	SCHMIDT SARAH	05/25/11	Chartlink Photo	jpg	JPEG Image	U	01	007867	
21002032	SHORE ABBY	05/25/11	Chartlink Photo	jpg	JPEG Image	U	01	007868	
21002075	SMITH ELLA KATHERINE	05/16/11	Chartlink Photo	jpg	JPEG Image	U	01	007695	421271
31110004	MARSHALL LILLIAN	05/25/11	ORDER RESULT	doc	Word Document	A	01	007850	
31414705	MIDDLETON LAURA	05/24/11	Patient Summary	cda	Clinical Document Arch.	A	01	007837	

Listed below is an explanation of each column.

- **Account**: The patient's account number pulls from the Registration and ADT screen.
- **Patient Name**: Pulls from the Patient Tab on the Registration and ADT screen
- **Date**: Pulls the date the document was placed on the patient's account.
- **Title**: Pulls the name of the document that was placed on the patient's account.
- **Doc. Ext.**: The type of document extension that was placed on the patient's account.
- **File Type**: The type of file that was attached to the account.
- **Doc. Type**: The way the file was attached to the account. **A** means the file was attached and **U** means the file was uploaded.
- **/od?**: Pulls the optical disk drive the image is stored on.
- **Image Number**: The number assigned to the document.
- **Just-Like Number**: Pulls the patient's account number the document was just liked off of.

Signed Images Status

The Signed Images Status report will identify all images that have been signed or need to be signed.

How to Print

1. Select **Other Applications and Functions** from the Hospital Base Menu.
2. Select **Word Processing**.
3. Select **Ad Hoc**.
4. Select **Report Dashboard**.
5. Select **Add Report**.
6. Select the following report sequence option:
   Signed Images Status
7. Select **Select**.
8. Select the desired report parameters.

   System prompts, "Facility:"

9. Select the desired Facility. (Only Facilities selected for access under that User Based Login will be available for selection.)

System prompts, "Date Range:"

10. Enter the desired image creation date range.

System prompts, "Signature Date Range:"

11. Enter the signature date range.

System prompts, "File Index Type Title:"

12. Enter the desired File Index Type Title, or leave blank.

System prompts, "File Index Report Code:"

13. Enter the desired File Index Report Code, or leave blank.

14. Select one of the following desired statuses:
Unsigned
Signed
All
System prompts, "Include Cover Sheet:"

15. Select this option to include a Cover Sheet with the report.

System prompts, "Output Format:"

16. Use the drop-down box to select one of the following report Format options:
HTML
PDF
XML
CSV

System prompts, "Run Report"

17. Select **Run Report** to display the report in the selected output format.

Description and Usage

The Signed Image Status report will identify all images that have been signed or need to be signed. The report will list the status of the image as unsigned or signed. If the image has been signed, a Signature line will display showing the date, time, User Based Login and name of the employee or physician who signed the document.

Signed Image Status

11/21/2012			CPSI COMMUNITY HEALTH SYSTEM			1
14:14			Signed Images Status			signed_images_status.template
			11/21/2012 - 11/21/2012			

Account#	Document ID	Title	Date	Time	Phy Num	Report Code	Sign.	Logname
E0000091	1115	CONSULTATION NOTE	11/21/2012	13:02	0	ScanDoc	unsigned	mdm1647
E0000091	1114	PHYSICIAN ORDER	11/21/2012	13:02	0	ScanDoc	signed	mdm1647
	Signature:	11/21/2012 13:59	adt3030	HUGHES ROBERT W				

Listed below is an explanation of each column.

- **Account# (Account Number)**: Pulls patient's account number from Patient Functions.
- **Document ID**: Pulls the Document ID assigned to the image.
- **Title**: Pulls the name of the Image Title assigned to the document at the time of scanning.
- **Date**: Pulls the date the image was attached to the account.
- **Time:** Pulls the time the image was attached to the account.
- **Phy Num (Physician Number)**: Pulls the number of the physician or employee associated with the image.
- **Report Code**: The type of file that was attached to the account.
- **Sign**: The status of the document. This column will display Unsigned or Signed.
- **Logname**: Pulls the User Based Login of the employee or physician logged in when the image was scanned.
- **Signature**: This field will display the date, time, User Based Login and name of the employee or physician who signed the document.

E-Signed Images

The E-Signed Images report will identify all images that have been signed in a specified date range.

How to Print

1. Select **Other Applications and Functions** from the Hospital Base Menu.
2. Select **Word Processing**.
3. Select **Ad Hoc**.
4. Select **Report Dashboard**.

5. Select **Add Report**.

6. Select the following report sequence option:
E-Signed Images Status

7. Select **Select**.

8. Select the desired report parameters.

System prompts, "Facility:"

9. Select the desired Facility. (Only Facilities selected for access under that User Based Login will be available for selection.)

System prompts, "Signature Date Range:"

11. Enter the signature date range.

System prompts, "File Index Type Title:"

12. Enter the desired File Index Type Title, or leave blank.

System prompts, "File Index Report Code:"

13. Enter the desired File Index Report Code, or leave blank.

System prompts, "Include Cover Sheet:"

15. Select this option to include a Cover Sheet with the report.

System prompts, "Output Format:"

16. Use the drop-down box to select one of the following report Format options:
HTML
PDF
XML
CSV

System prompts, "Run Report"

17. Select **Run Report** to display the report in the selected output format.

Description and Usage

The E-Signed Image Status report will identify all images that have been signed in a specified date range. The report will list the date, time, User Based Login and name of the employee or physician who signed the document.

Signed Image Status

03/15/2013 CPSI COMMUNITY HEALTH SYSTEM 1
11:00 E-Signed Images esigned_images.template
03/15/2013 - 03/15/2013

Account#	Document ID	Title	Sign Date	Time	Logname	Phy Name	Phy Num	Report Code
357415	634	ESIGN CONSULTATION	03/15/2013	10:42	u123475	SMITH DANIEL E	123475	ScanDoc
357423	623	ESIGN PHYSICIAN ORDERS	03/15/2013	10:46	u123475	SMITH DANIEL E	123475	ScanDoc
357412	635	EKG	03/15/2013	10:58	u660000	Bell Frank C	660000	ScanDoc
357260	593	EKG	03/15/2013	10:59	u660000	Bell Frank C	660000	ScanDoc

Listed below is an explanation of each column.

- **Account# (Account Number)**: Pulls patient's account number from Patient Functions.
- **Document ID**: Pulls the Document ID assigned to the image.
- **Title**: Pulls the name of the Image Title assigned to the document at the time of scanning.
- **Sign Date**: Pulls the date the image was signed.
- **Time:** Pulls the time the image was signed.
- **Logname**: Pulls the User Based Login of the physician or employee logged in when the image was signed.
- **Phy Name (Physician Name)**: Pulls the name of the physician or employee who signed the image.
- **Phy Num (Physician Number)**: Pulls the number of the physician or employee who signed the image.
- **Report Code**: The type of file that was attached to the account.

Online Presentations

This section lists hyperlinks to online presentations that are applicable for this document. They are not intended to replace the document but are to be used in conjunction to enhance the process and/or procedures related to this application.

Electronic File Management