SuiteMed
Beyond EMR

Objectives & Goals – Scanning & Document Management

- Opening & Understanding Multi Scan/Select
- Scanning & Drag/Drop Documents
- Set Document Details
- Set Reminders, Actions and Links
- Create New Document From Selected Pages
- Open Patient Documents
- Managing Patient Documents
- View, Edit and Forward Documents
- Document Management
- Tips & Parameters

Hot Keys

F4 - Open Data Entry (Edit) Window
Ctrl + N - Add a New record
Ctrl + E - Edit a record
Ctrl + L - Cancel a record
Ctrl + H - Search a record
Ctrl + F5 - Refresh

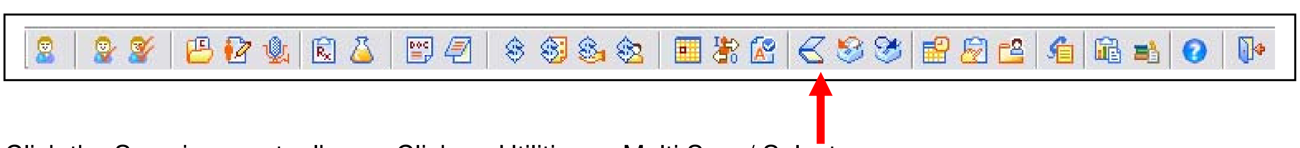
F5 - Open Search Window
Ctrl + Del - Delete a record
Ctrl + S - Save a record
Ctrl + R - Retrieve all records
Ctrl + T - Sort

The following Short cut keys are for Report Options:
Ctrl + R - Retrieve (records)
Ctrl + I - Print Preview
Ctrl + D - Report Design
Ctrl + T – Sort

Ctrl + G - Page Setup
Ctrl + P - Print
Ctrl + Z - Zoom
Ctrl + M - Mail Merge

Tab – toggle through data entry fields
Shift & Tab – toggle backwards through data entry fields

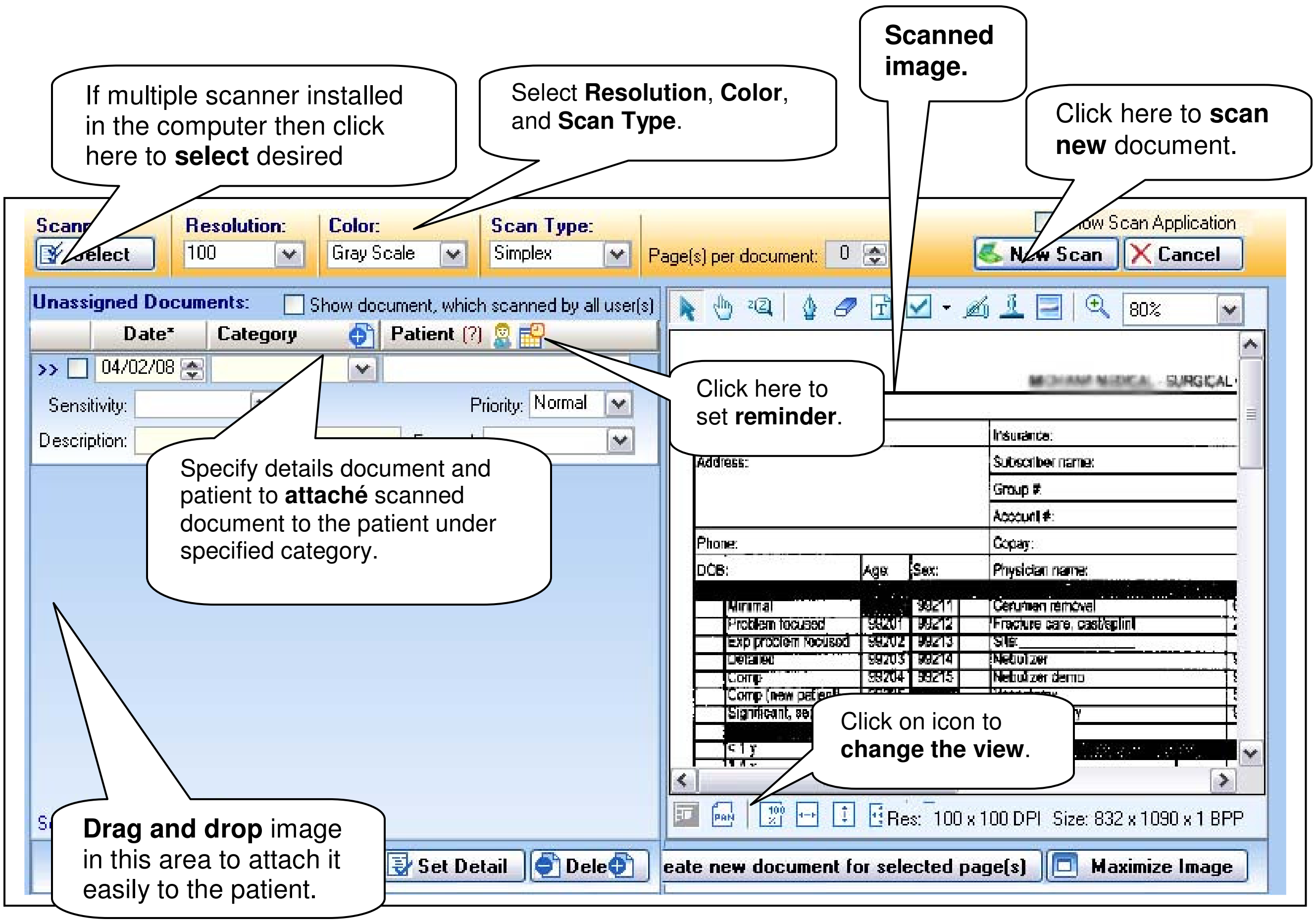
Open the Multi Scan Select Window



Click the Scan icon on toolbar or Click on Utilities>> Multi Scan/ Select…..

NOTES:

Understanding the Multi Scan/Select Documents Window



Select Scanner - click on “Select” button to open select scanner screen. If multiple scanners are setup in the computer then the screen will display all available scanners. Make sure to select the desired scanner.

Resolution & Color – we have found that the resolution works best at 100 or over. We recommend choosing gray scale under the color option. This delivers a better quality than black & white, but does not take as much memory as color. You do have the option to choose black & white or color. Play with the various options and see what quality your office desires.

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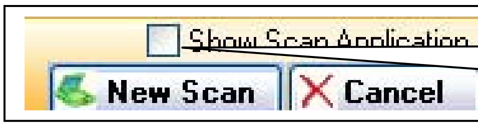
Scan Type – your options are simplex, duplex, mix (two sides) and mix (single side). Simplex is a one sided page. Duplex is a double sided page. The mix options are also for one sided or two sided documents. Depending on your scanner you will find the option the works best for your office. With a Fujistu scanner we have found the mix single side works better than the simplex.

Pages per document – you can leave this at 0 to one large document. Or you can choose the number of pages per document. If you have a group of 1 page documents you would set this to 1. If you have a group of two page documents you would set this to two, etc.

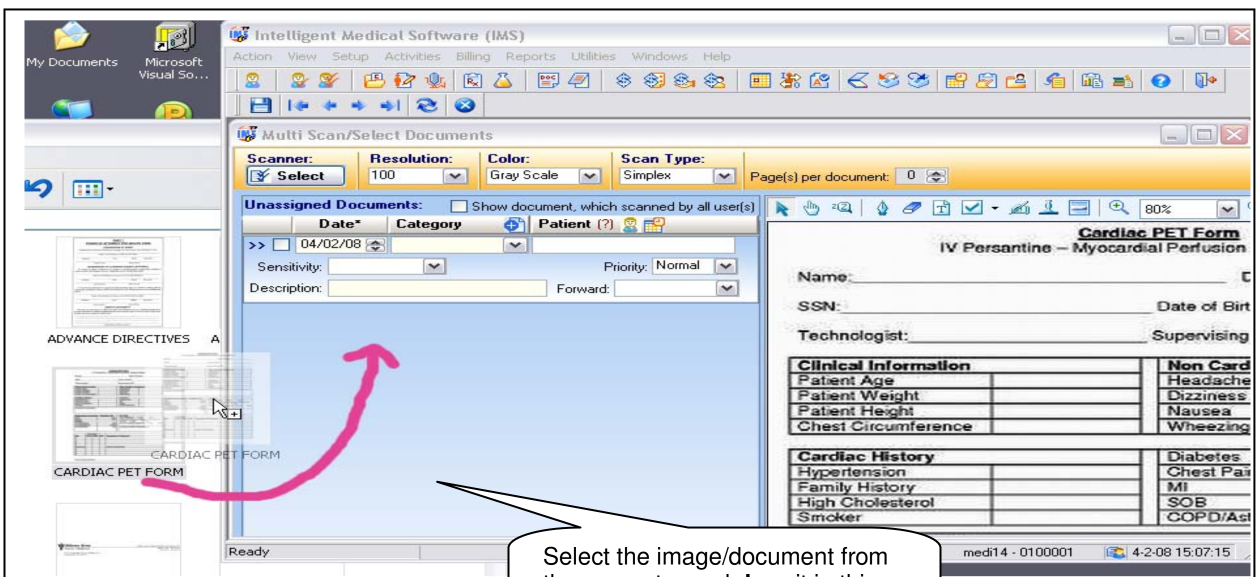
Once your options are set you will click the “New Scan” button to begin scanning your documents.



Check this box to see scanning application screen before scanning the document. After that click on “New Scan”.

Drag & Drop Documents

Instead of scanning you can also and Drop documents into Multi Scan/Select window from your desktop.



Select the image/document from the computer and **drag** it in this area.

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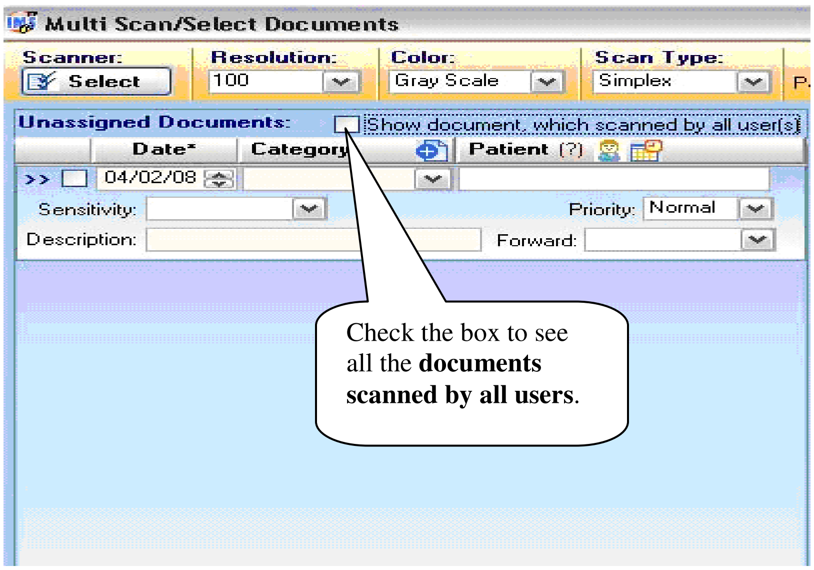
You have the option to view only the documents that you scanned or view all documents scanned by all users. Check the box indicated below to view all users or uncheck to view only your scanned documents.



Set document details

After scanning in the document you will set the details of the document in order to categorized and attach it to a patient.

Date – any date you want to categorize the document by. We recommend using the date of the document.

Category – see the manual section on document setup to create your document categories. Select the category your document will fall under or hit the + button to add a new category. The first set of words is the document description, then set in parenthesis ( ) is your category.

Patient – select the patient that this document pertains to.

Click the calendar icon to set reminders. See the details below on this option.

NOTES:

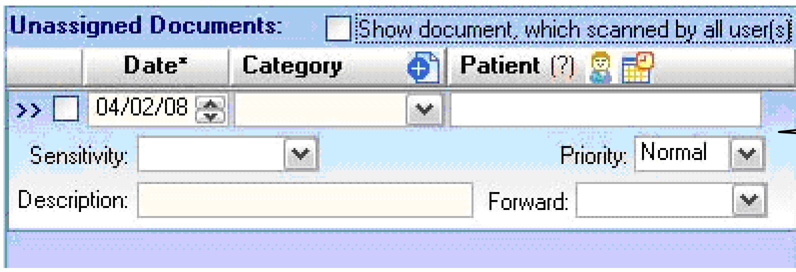
Sensitivity – you can set document sensitivity.

Action/Link – see details below to set an action or link for this document.

Priority – choose normal or urgent.

Description – a detailed description of this document. Note – be as specific as possible as this will tell you what the document is later without having to open it.

Forward – you can choose to forward a copy of this document to someone in your office or everyone in your office.



Select the document to set detail.

When your details are completed hit the save icon to save the information. Once saved and you close this screen and reopen it your documents will be gone.

Set Reminders 

After selecting your document detail you can click the calendar to setup reminders for this document.

The window gives you the available reminder tasks that have been setup previously to select from.

To add a new reminder task click the reminder icon from your main task bar or go to Activities>> Reminder. Select the Reminder Setup button and the task tab. Hit add to create a new task and save when complete.

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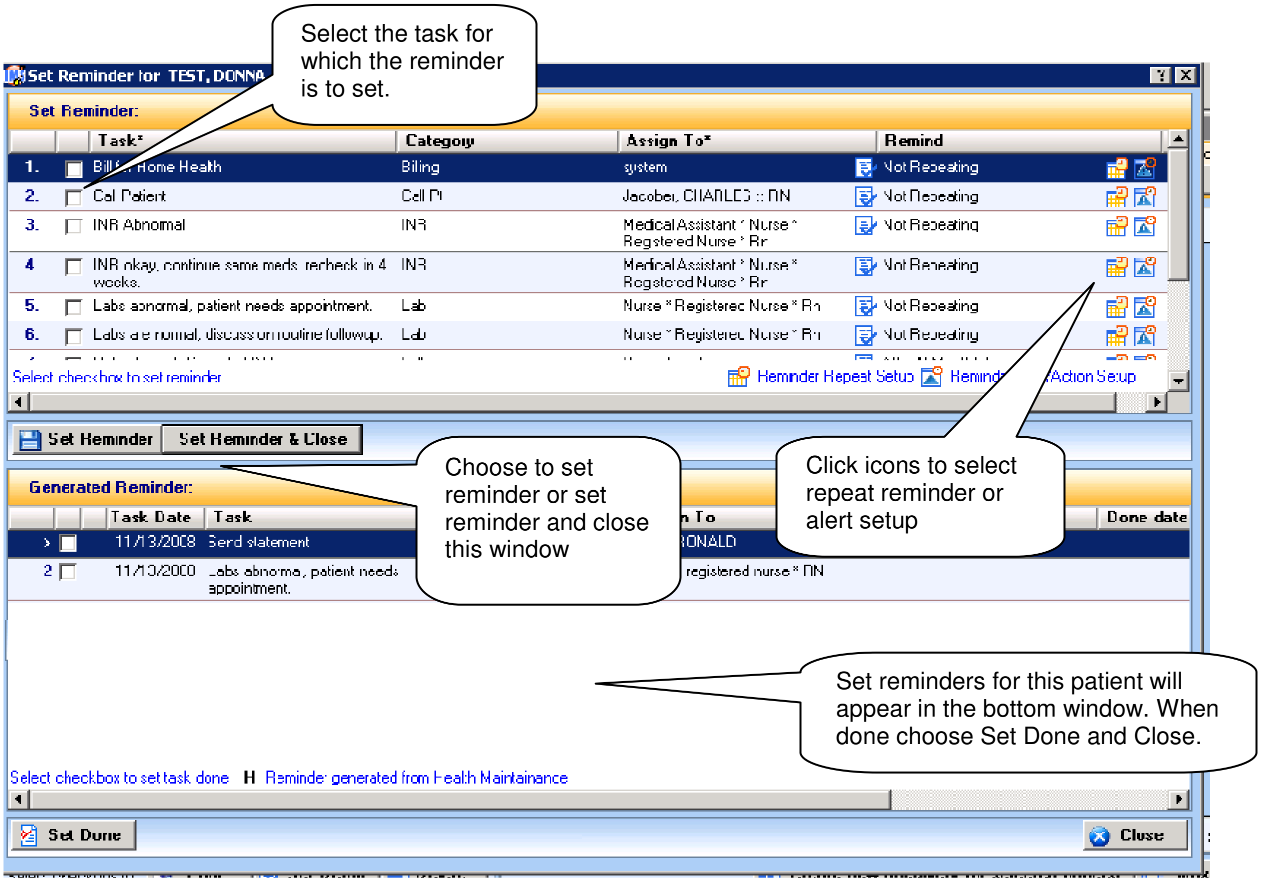
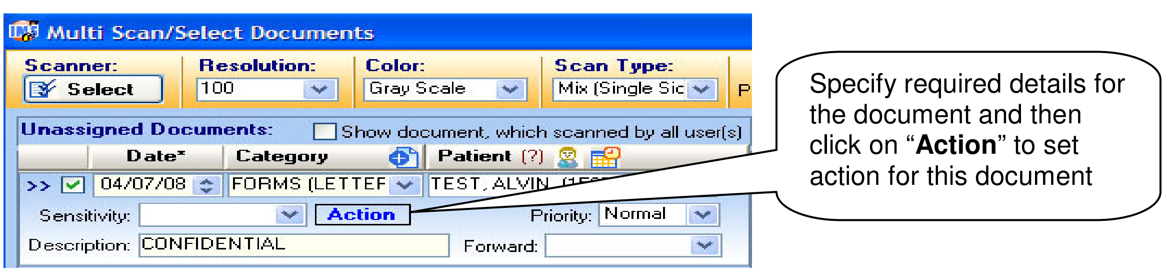
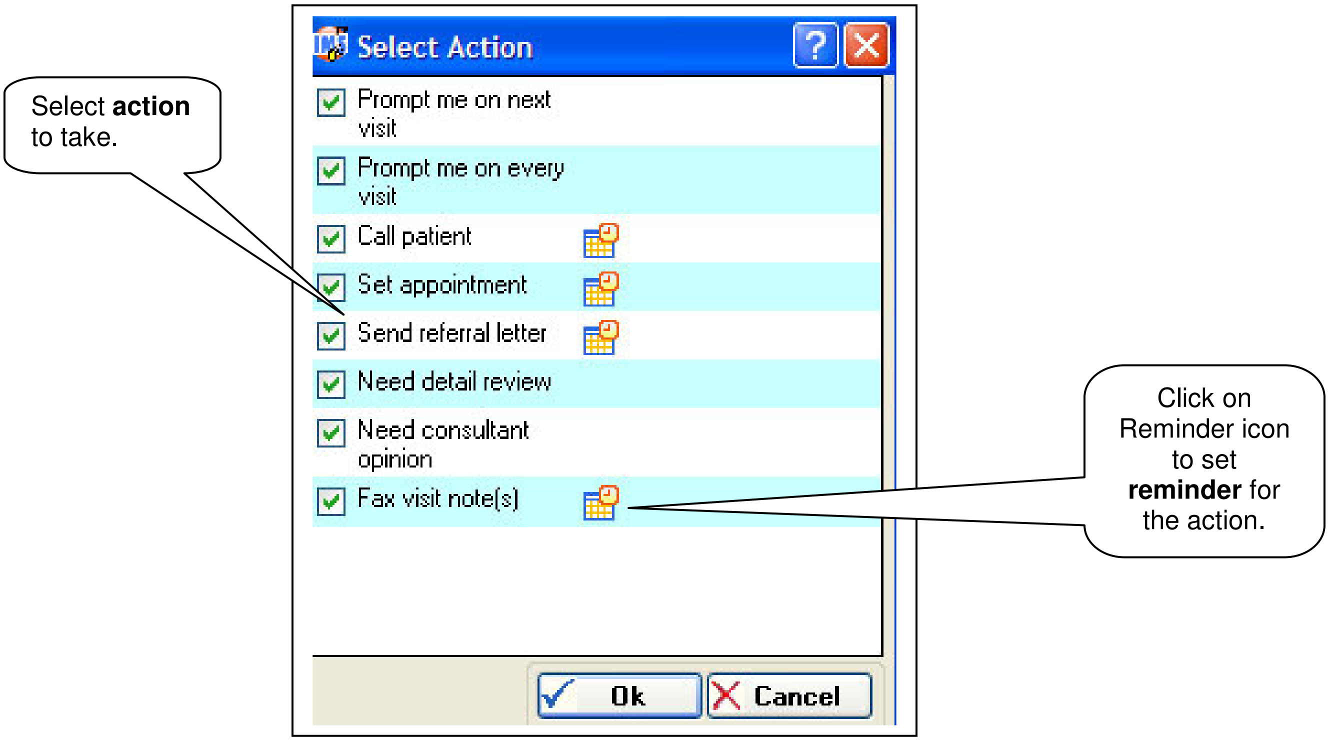


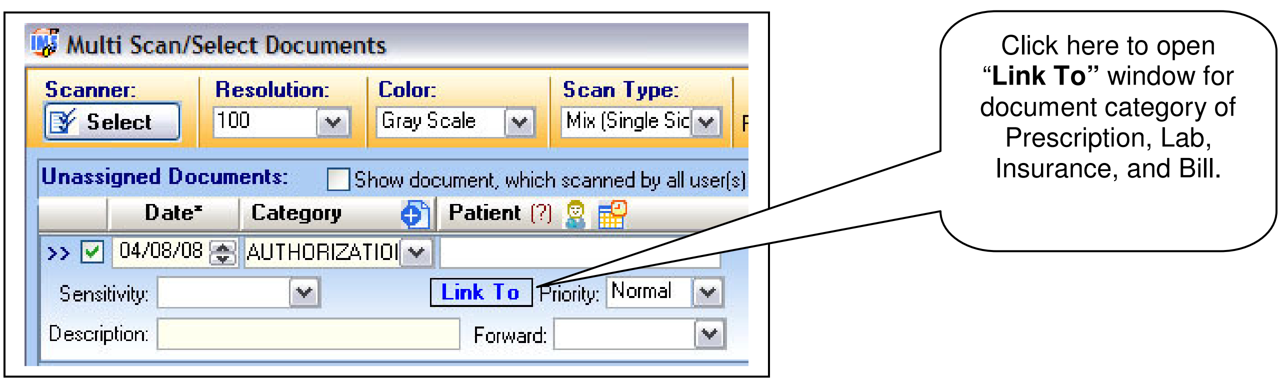
Setting Actions



NOTES:

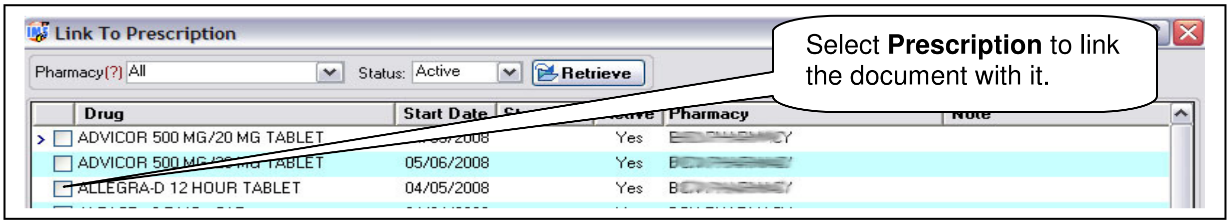


Link Documents from Multi Scan/Select Window

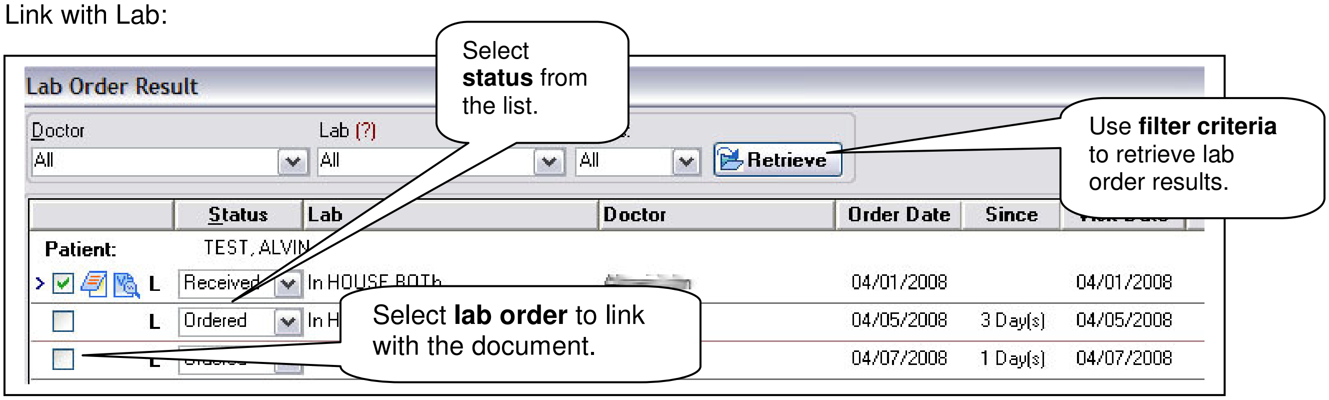


NOTES:

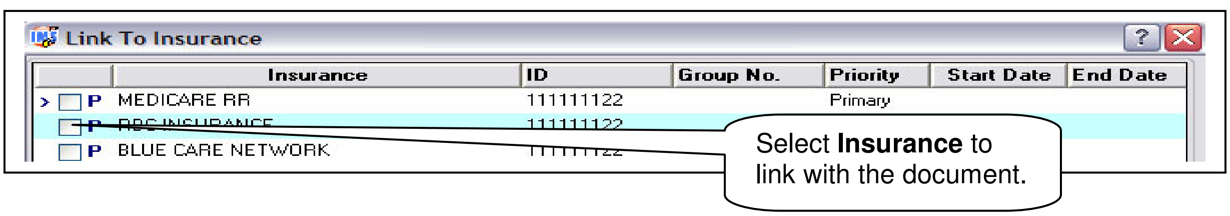
Link with Prescription:



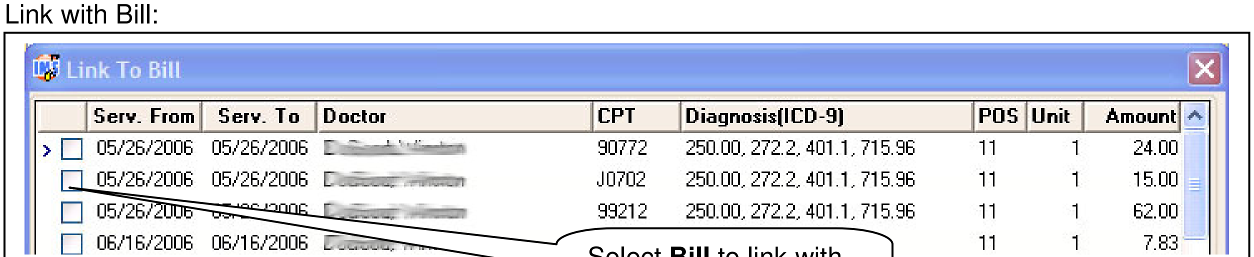
Link with Lab:



Link with Insurance :



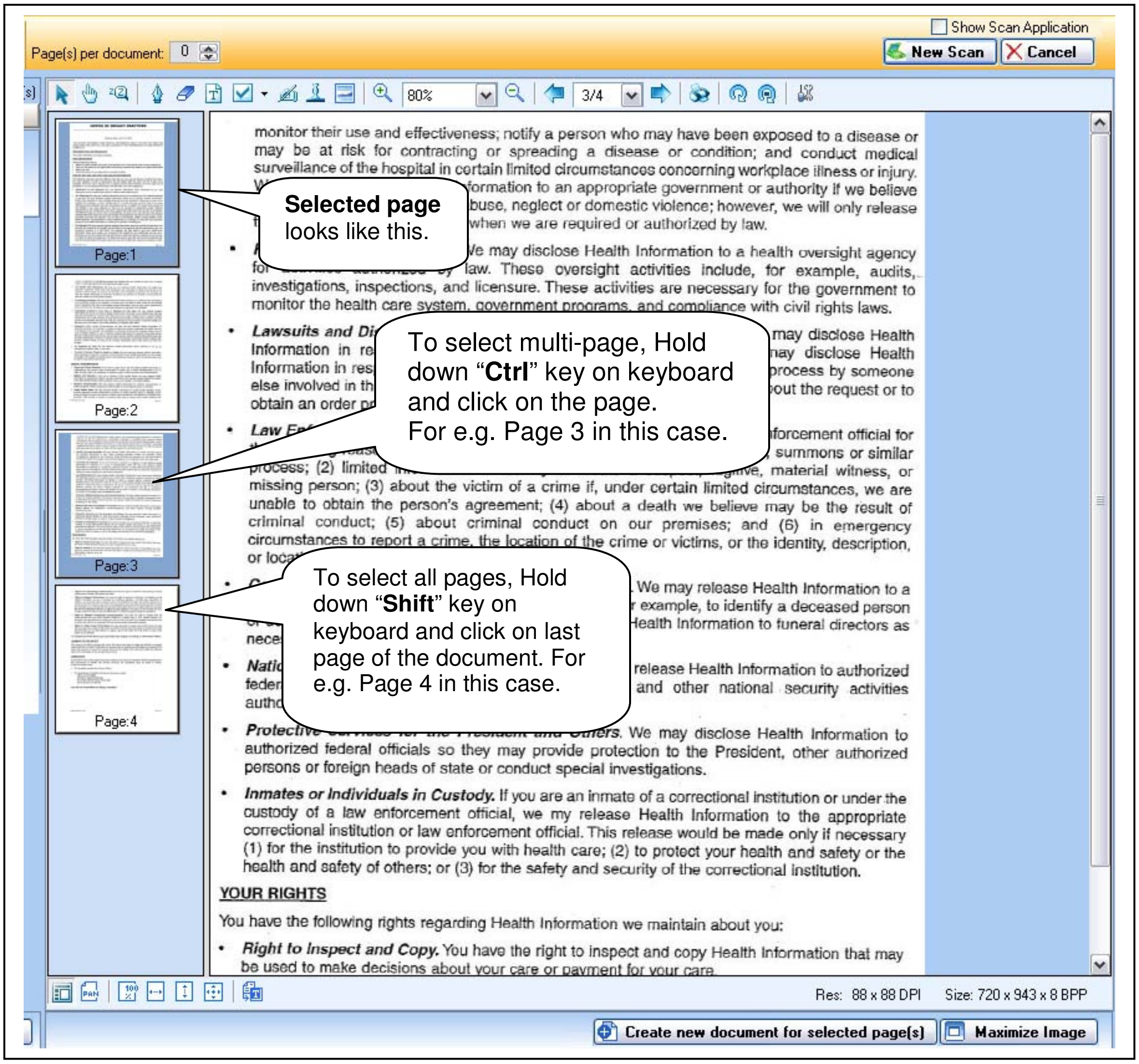
Link with Bill:



Create New Document for Selected Pages

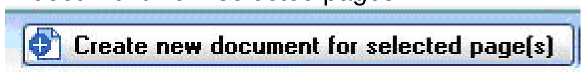
NOTES:

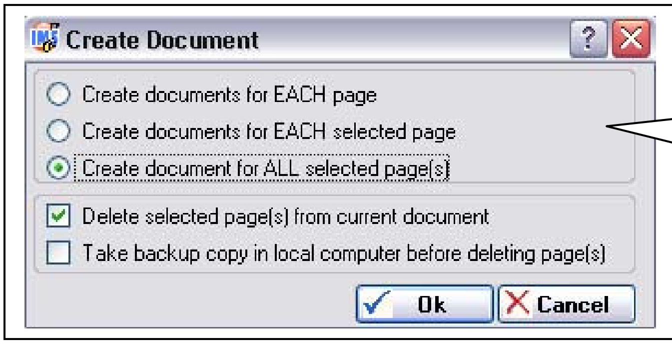
Select multiple pages in a multi page document (using Ctrl and Shift)



NOTES:

Click on the button to "Create new document from selected pages".

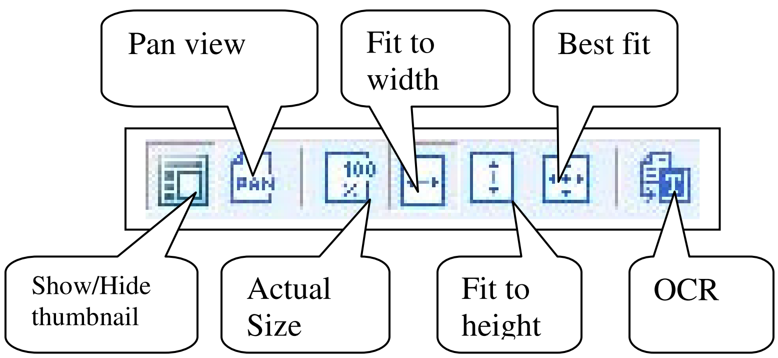


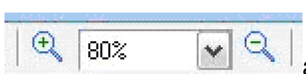


From the **"Create Document"** screen select desired options to create a new document for selected pages.

Change the views of the documents

From bottom of the screen, click on desired button to change the view of the document.

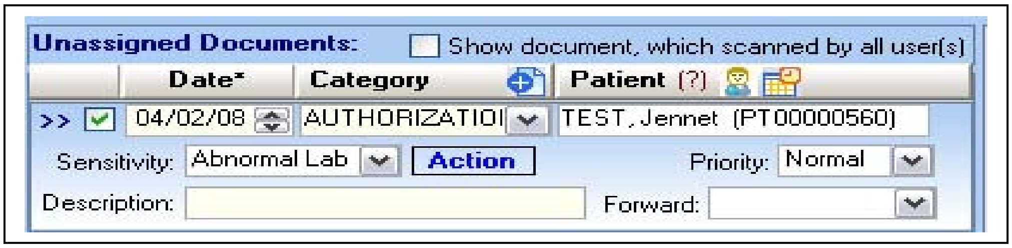


Or Click on list box  and select desired view for the document.

NOTES:

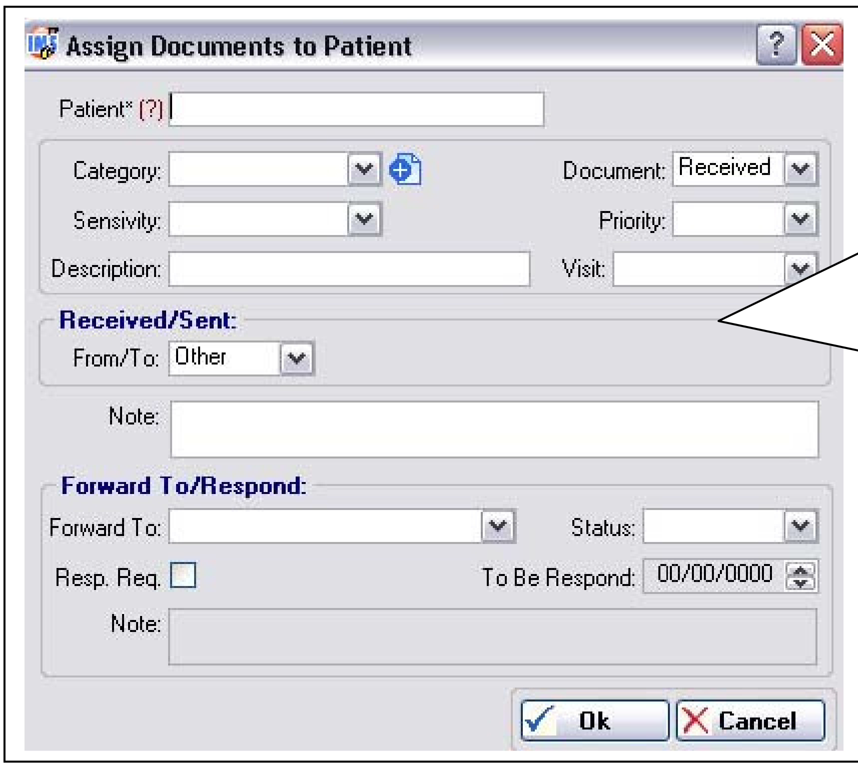
Set Chosen Details to Multiple Documents

Select documents you want the details to apply to by placing a check mark in the box in front of each document.



Then click on "Set Detail" 

button from the bottom panel to set details for the document.



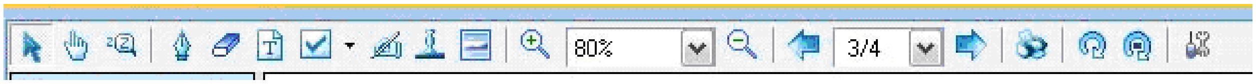
Specify the details that you want to apply to every document you selected.

For example, if the were all for the same patient you would select patient name and say ok.

Then all documents would show with the same patient name.

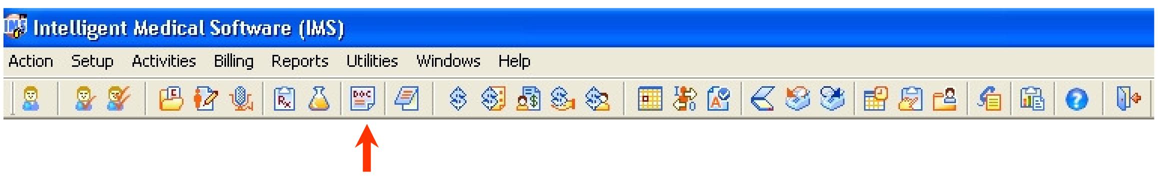
NOTES:

Edit Scanned Documents



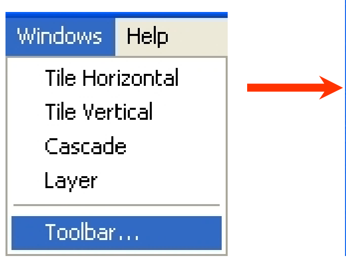
Using the tool bar you are able to edit the document from the Multi Scan/Select Documents Window. For a full description of each tool see below in the documents section.

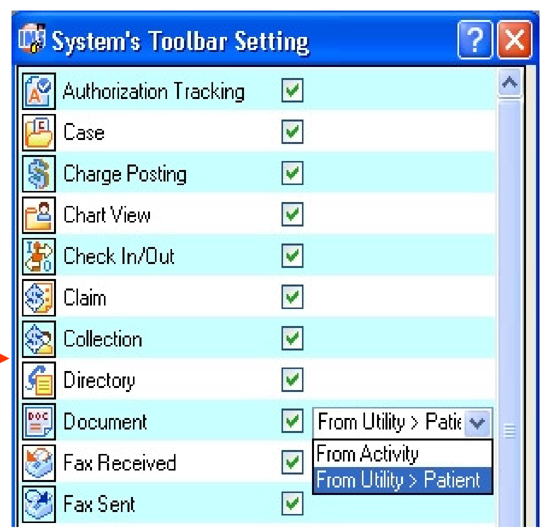
Open Patient Documents



Click on Documents icon  to open Patient Document or by clicking on the menu Utilities>> Patient>> and Document.

Note: To default the Patient Document Utility to open from the Documents  Icon, click on **Windows** menu, select **Toolbar.** The System's Toolbar Setting window will open, select "**From Utility > Patient**" against Document.





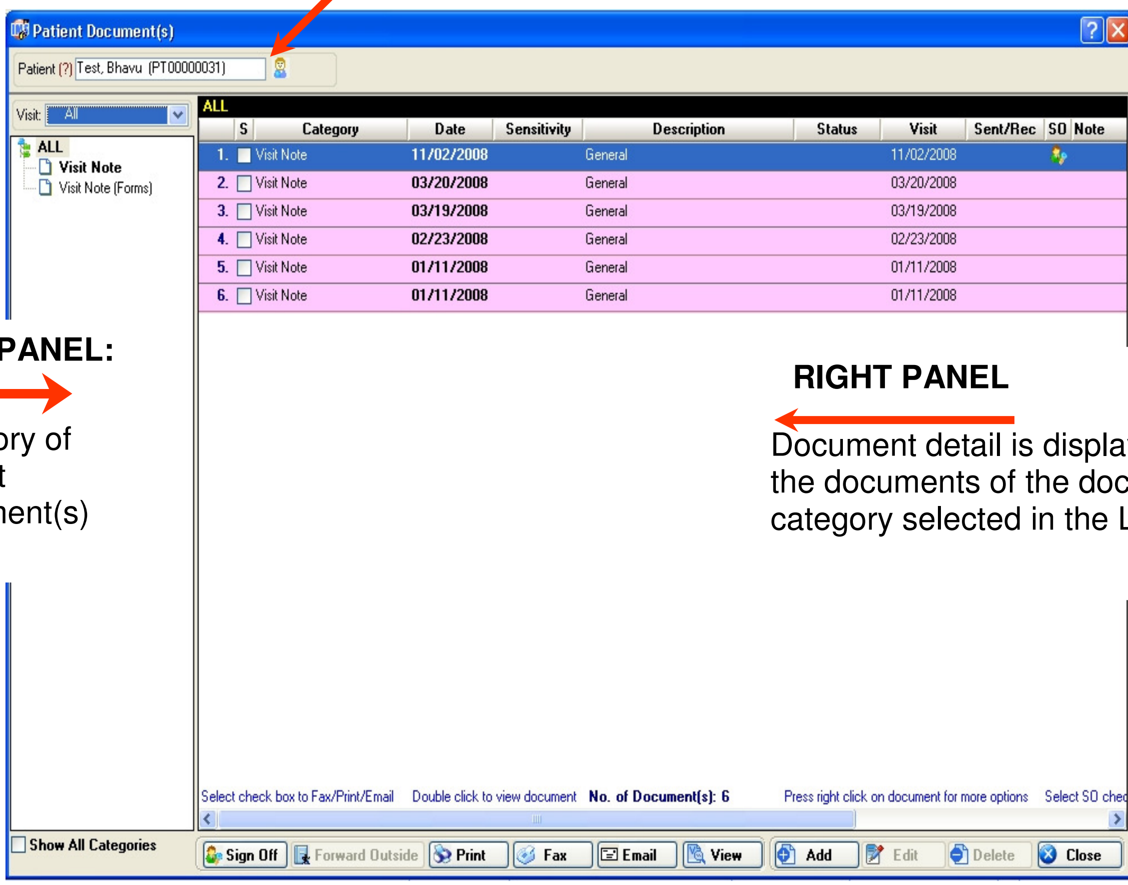
NOTES:

You can also open Patient Documents from Patient Master. Click on Setup>> Select Patient, or click on (Patient) icon on the toolbar, or press F2. When the Patient Master Opens, Select Document.

Retrieve Patient Documents

Enter the Patient name in the "Patient" field on the Top - Left panel then click Tab button on your keyboard Or Search a Patient's name. To Search a Patient's name, click on the label of the "Patient" name field or press the F5 key. Search Patient window opens. You can Search and Select a Patient.

Selected patient's Name and Chart Number are displayed in Patient



LEFT PANEL:

Category of Patient Document(s)

RIGHT PANEL

Document detail is displayed here for the documents of the document category selected in the Left panel.

Navigate through Document Categories

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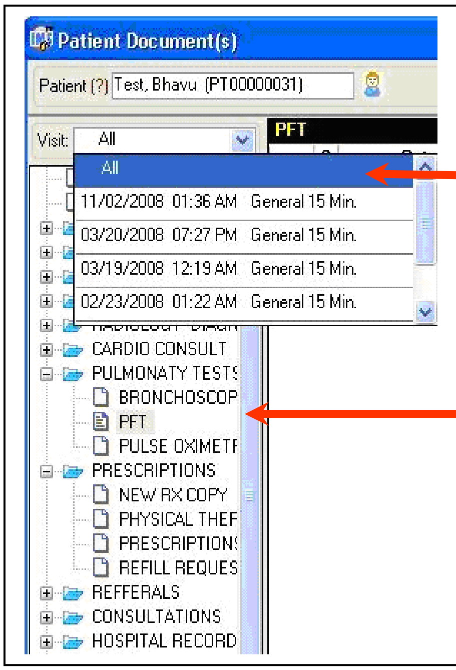
Category of Patient Document(s): If the Document is Visit Note or Visit Note (Forms), then it is displayed as Visit Note or Visit Note (Forms) as Category.

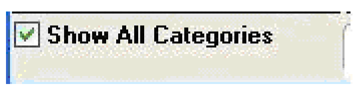
RIGHT PANEL: If any document was created for the selected patient (from here or from Document Activity), then the documents of All Visits are displayed here.



To select Documents/Visit Note Forms of a particular visit, select a Visit Date from the "Visit" list, and for all visits select "All" in the "Visit" list.

To select documents of a particular category for the selected visit, click on that Document Category in the Left panel.

(Expand the Category tree if required. You can expand the tree by clicking on ☐ button).



A Document Category is displayed only if any document exists for that category. But if you want to display all categories, then Check the Check box "Show All Categories", then the BOLD categories are the ones that contain documents. .If there is no document for a category but you want to add a new document from here, then you can show all categories and select the category for which you want to add a new document from here.

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View and Edit Documents

To view a document, double click on the selected row. OR

Click on the document's row, and then click on 

button. Patient Document(s) screen opens and you can choose to edit the document, forward the document, select document actions and print the document. See below for the details on these options.

To Edit a document’s details - click on the edit button instead of view from the main document menu.

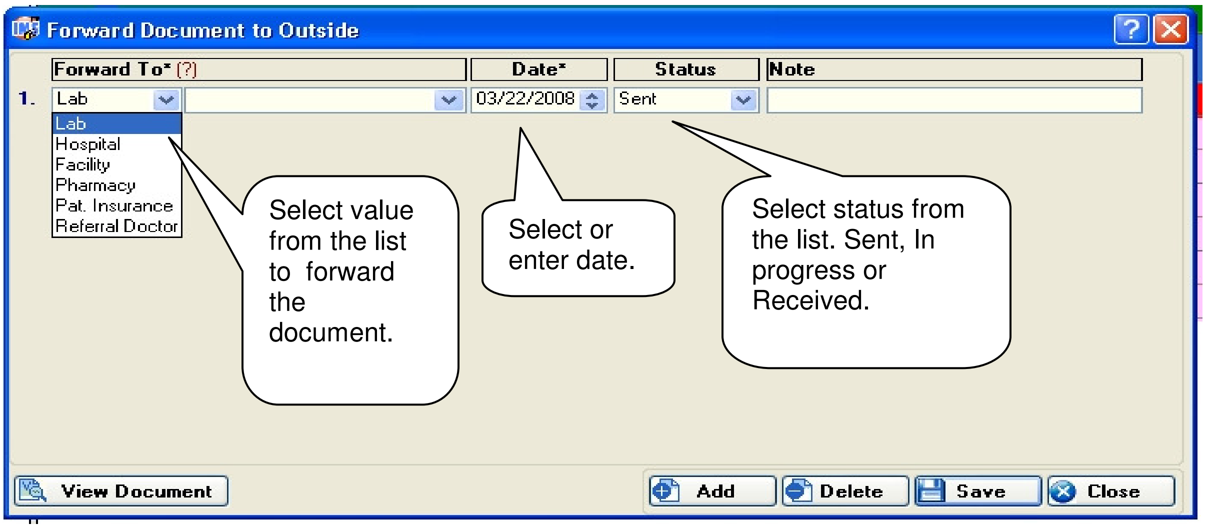
From this toolbar you can also sign off on a document, forward outside, print, fax, email, add a document, delete a document and close the document screen.

From this main menu you can also select a document and right click your mouse on that document to see the options available for that specific document.

NOTES:

Forward a Document to Someone Outside the Clinic
Lab, Hospital, Facility, Pharmacy, Patient's Insurance, Referral Doctor.

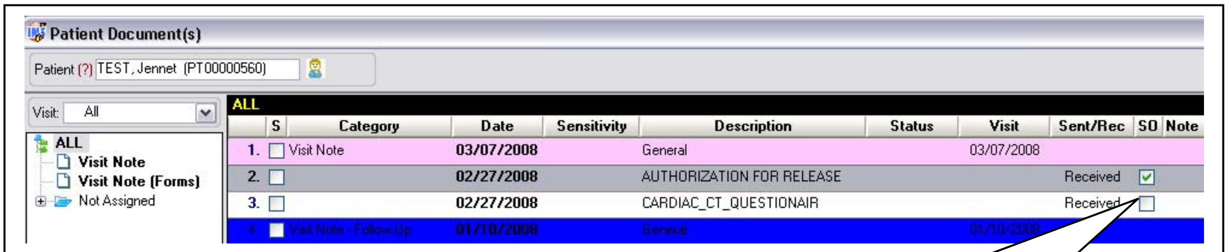
Select the document and then click on "Forward Outside" button.



NOTES:

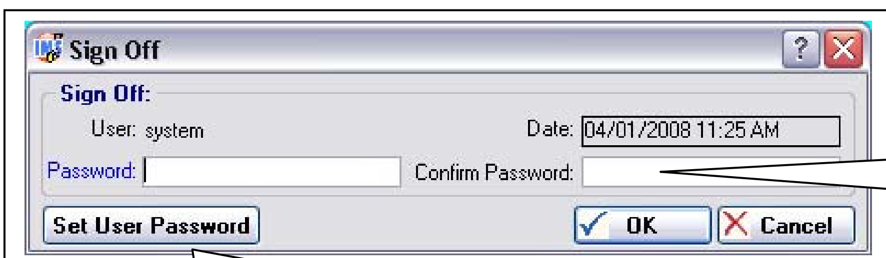
Select a Document to Sign Off

User can select a document that needs to be signed off. A box will appear under the SO column for items that need to signed off on.



Check the **'Sign off'** box for the document you want to sign off on.

After selecting 'Sign-off' box click on **'Sign Off'** button from the bottom panel.



Enter specific **password** to sign off the document.

Click on **'Set User Password'** to sign off with user's IMS password.

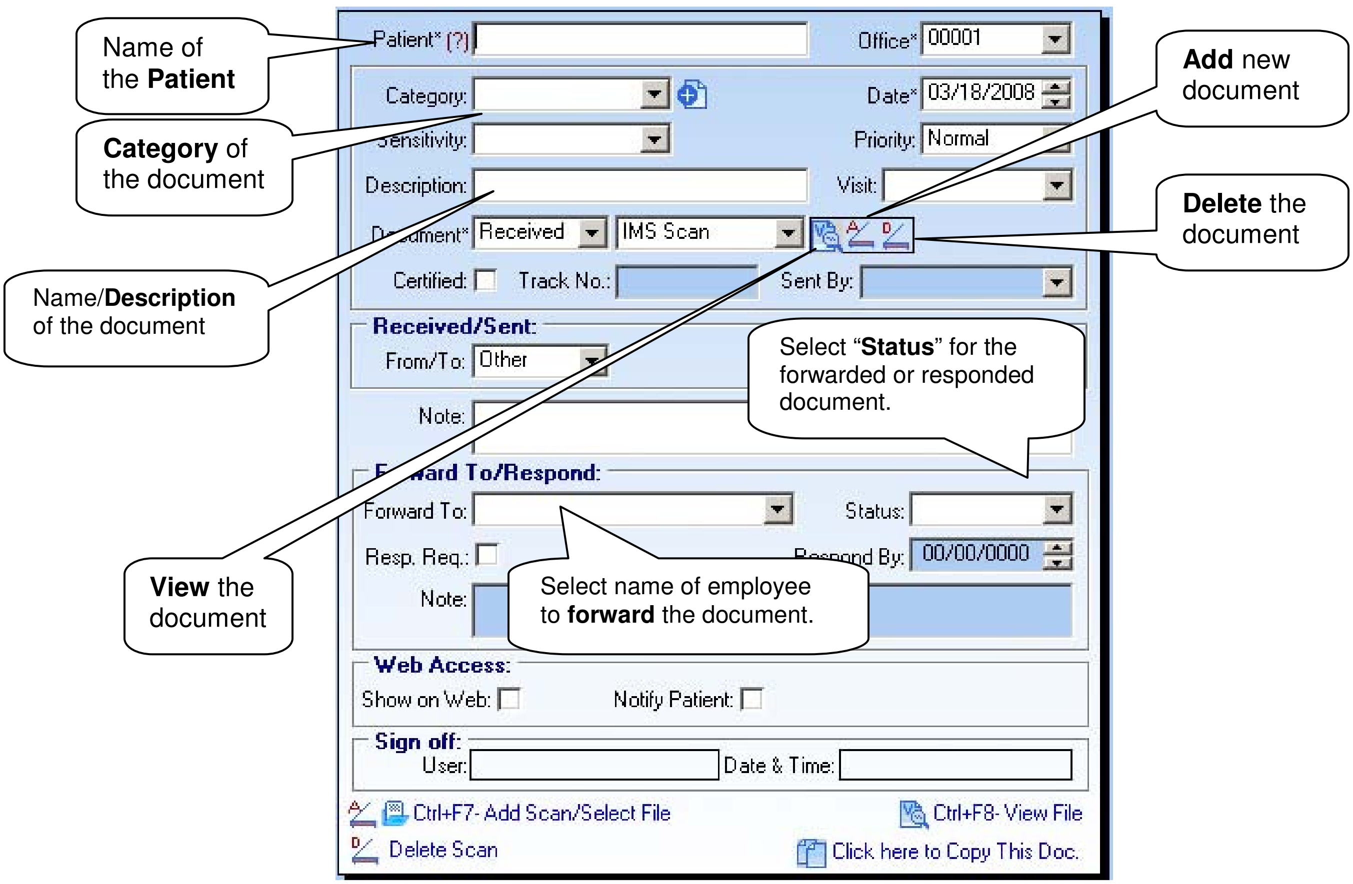
NOTES:

Edit Document Details

To edit a document's details click the edit button from the main document window. 

Here you can change a document category, document description, forward it to someone in the office, sign off and show on the web patient portal.

See the diagram below for the details available on the edit screen.



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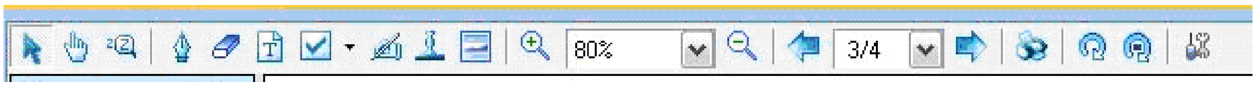
View/Edit Document

From the main document screen click the view button.

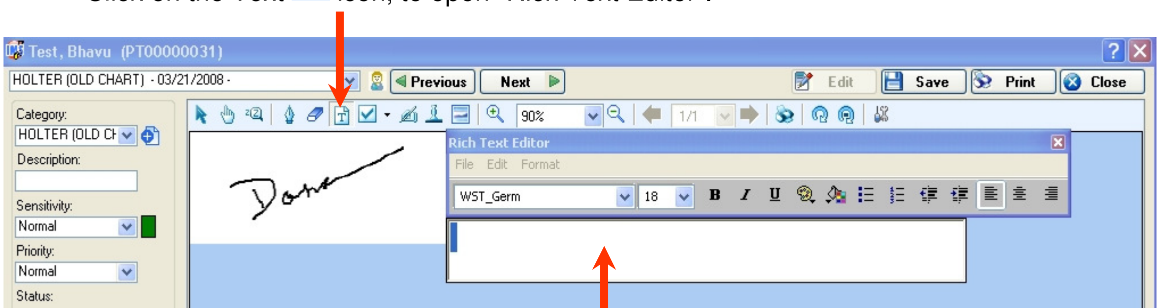
Then from the View Screen select Edit.



This gives you the following tools to edit the actual document:

Add Text on document:

Click on the Text  icon, to open "Rich Text Editor".

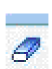


Enter text in Rich Text Editor to add text in the document.

Add Hand Writing on document:

Click on the Pen Icon  to start writing in the document.

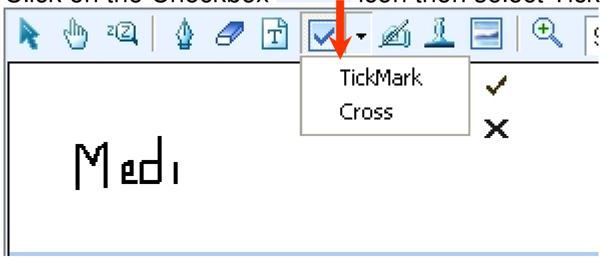
Erase something on a document:

Click on the Eraser Icon  to erase anything on the document.

NOTES:

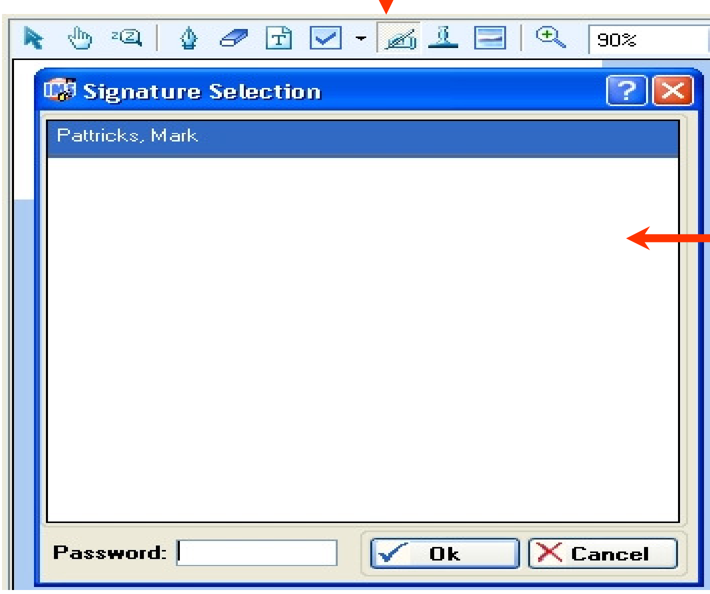
Create Checks or X's in a Checkbox:

Click on the Checkbox  icon then select Tick Mark or Cross to add in the document.



Add Signature:

Click on the Signature icon 

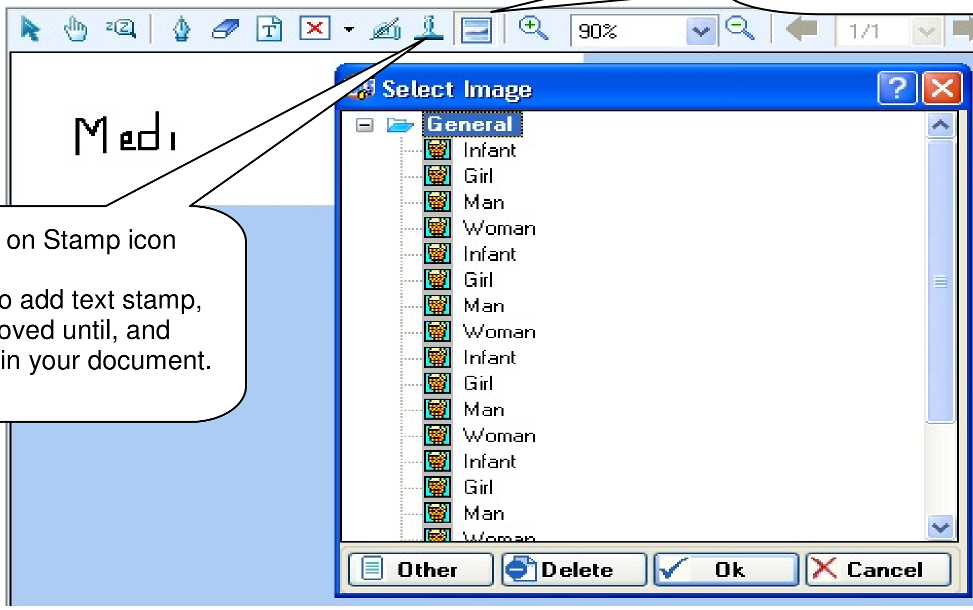


Signature Selection window will open, select the name you want to sign and enter the corresponding Password in the bottom of the window and then click on Ok button to add Signature on the document.

NOTES:

Enter Image and Stamp:

Click on the Image icon then select the image and click on Ok button to enter image in the document.



Click on Stamp icon to add text stamp, Approved until, and date in your document.

This icon will print the document

Use these arrows to scroll through the pages of the document

These icons will rotate a single page or all pages

NOTES:

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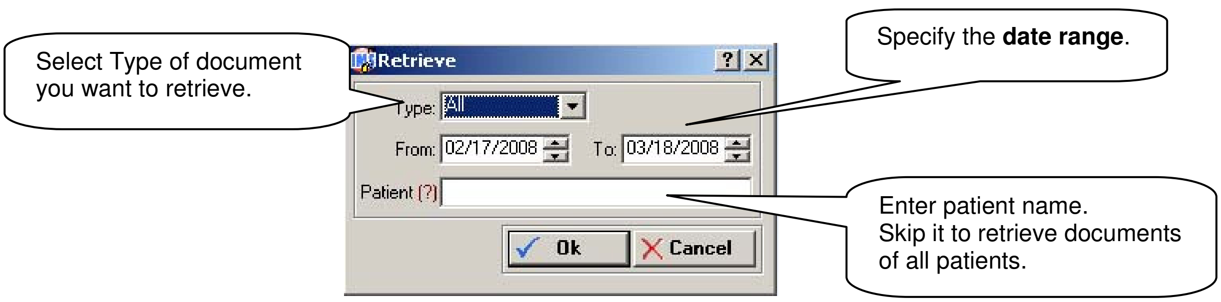
Patient Document Screen 2

You can also view Documents by Going to the menu Activites>> Document

Here you can view a date range of documents by type, patient or all.

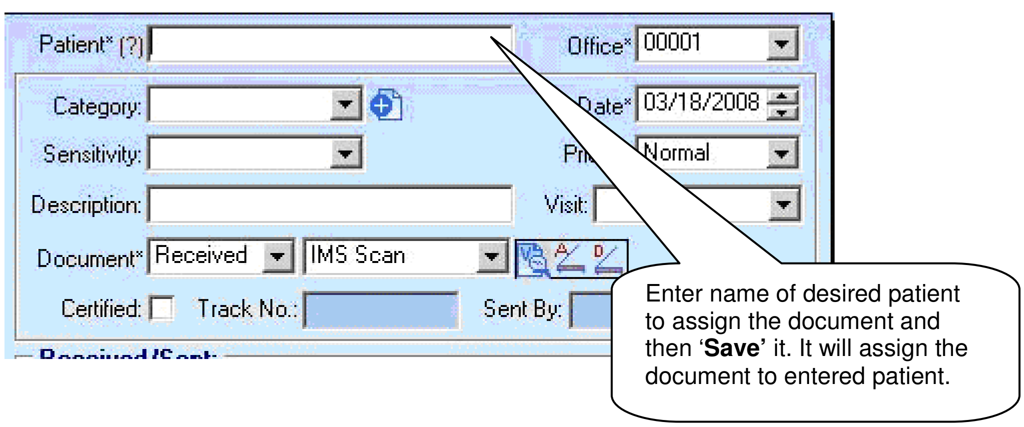


Assign a Document to a Different Patient

THIS IS THE ONLY PLACE TO CORRECT AN ERROR ON THE PATIENT DETAILS

Open patient document screen from Activities>Document

Specify Type and patient name to retrieve document. To make changes to the detail click the Go to detail button.



NOTES:

TIPS

If you scan something to the wrong patient the only place to change it is under Activites>> Document. Pull up the document and select go to detail.

Parameters

Setup>>Parameters>>System

Under>> Check In/Out you can setup default categories if wanted for documents and scanning.

Under>> Other you can choose how you want to sign off on documents after saying Done.

Setup>>Parameters>>User

Under >> Scanner – setup defaults for scan ADF, type, color and DPI

NOTES: