MILLE LACS BAND OF OJIBWE HHS POLICY & PROCEDURE

Department: Administration Services-Health Information Management

Policy Number: HHS-ADM-HIM 3403

Policy Title: Document Scanning Training

Attachments: VistA Imaging Scanning Process

Date:

Revised by/Date: Stacy Hopkins/Holly Hunter, 11/2019

Approved by: Jan Manary

Jan Manary, Executive Director of HHS

Date: 12.2.2019

Approved by:

Nicole Anderson, Commissioner of HHS

Date: 12-3-2019

POLICY STATEMENT: Mille Lacs Band Health and Human Services is committed to accuracy and ease of retrieval of patient documentation. For this reason scanning specialists must have training and approval to scan documents into the Electronic Health Record (EHR).

PURPOSE: The purpose of this policy is to define the training requirements for document scanning.

PROCEDURE: Scanning specialists are to be trained prior to scanning any document into VistA Imaging component. Competency of 10 scanned documents for administrative documents as well as clinical documents is necessary. Signature on file of those who have completed training as well as the date completed must be obtained by Compliance department, HIM or delegated individual. Scanner will refer to "VistA Imaging Scanning Process" while scanning documents. Process may be revised as necessary and scanners will be made aware of process amendments.

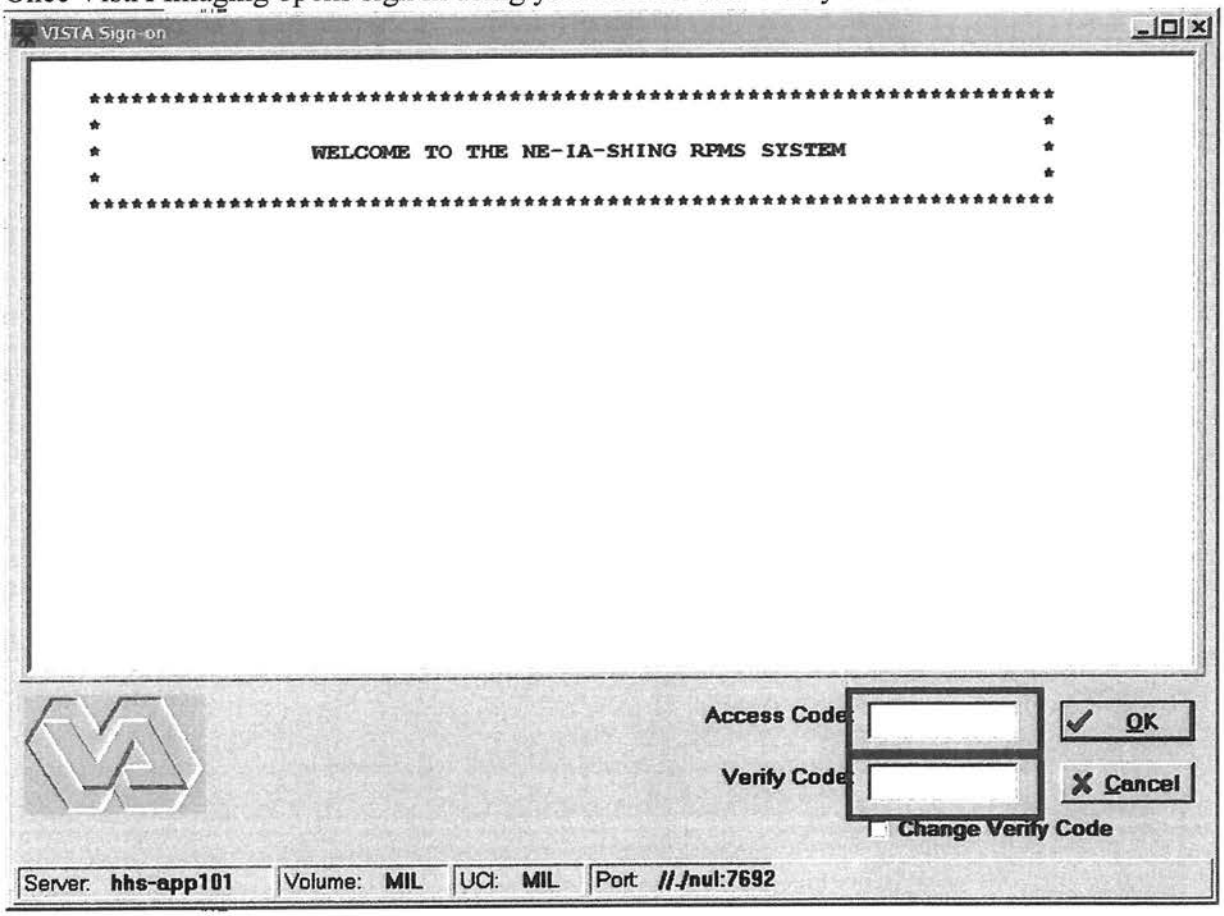
Internal and/or External References	
Compliance - Posting Date	12/3/2019
Next Review - Due Date	12/3/2022

VISTA IMAGING SCANNING PROCESS

Revised: 2.25.16

1. To begin scanning double click the VistA Imaging Capture client icon on your desktop.

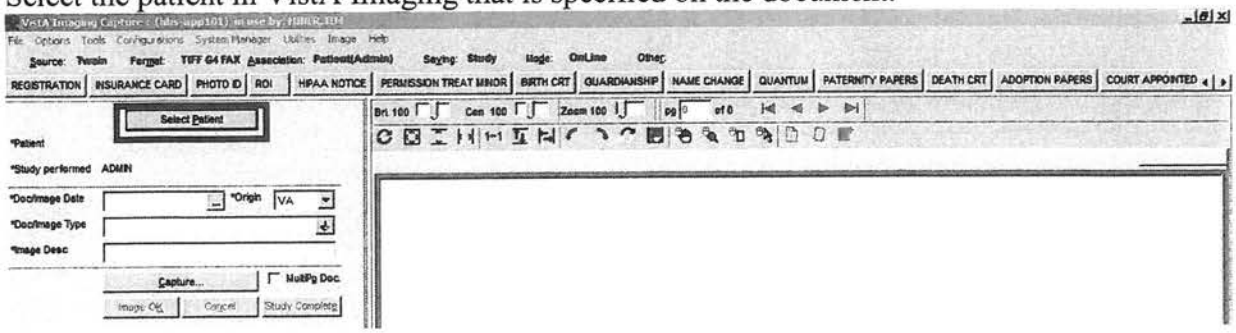
2. Once VistA Imaging opens sign in using your Access and Verify codes



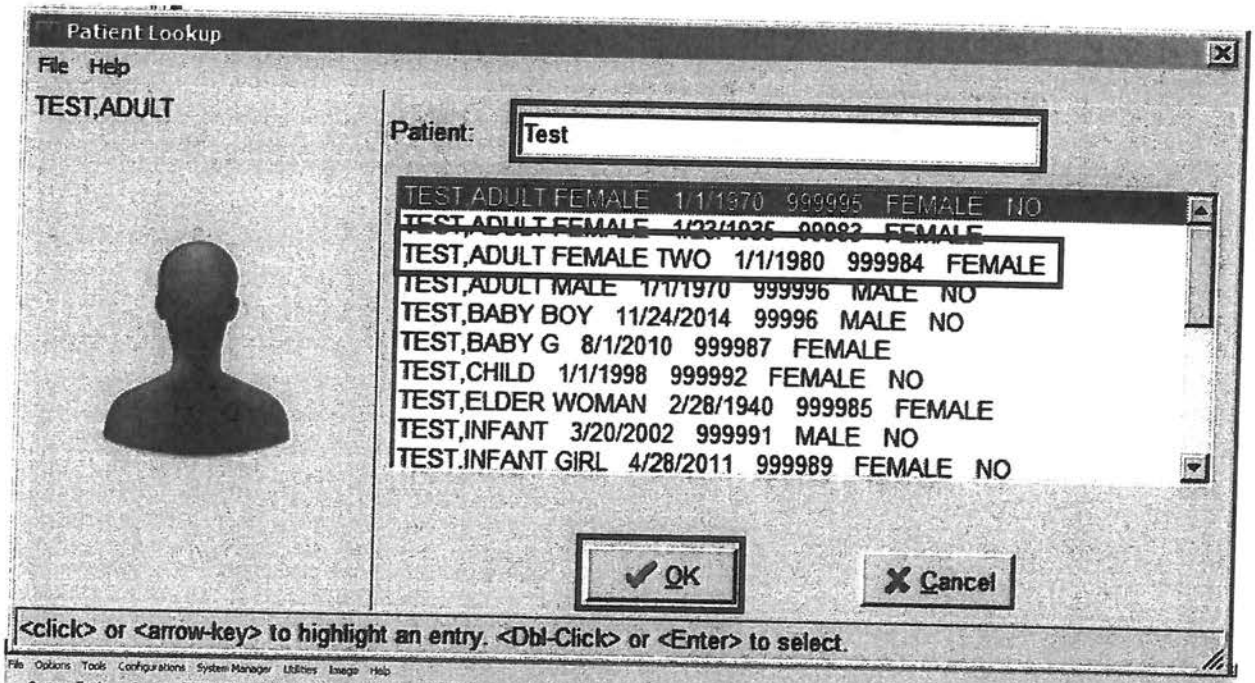
3. Pick up the document to scan and determine its document type.

4. Check the approved document list to make sure the document is on the approved list.

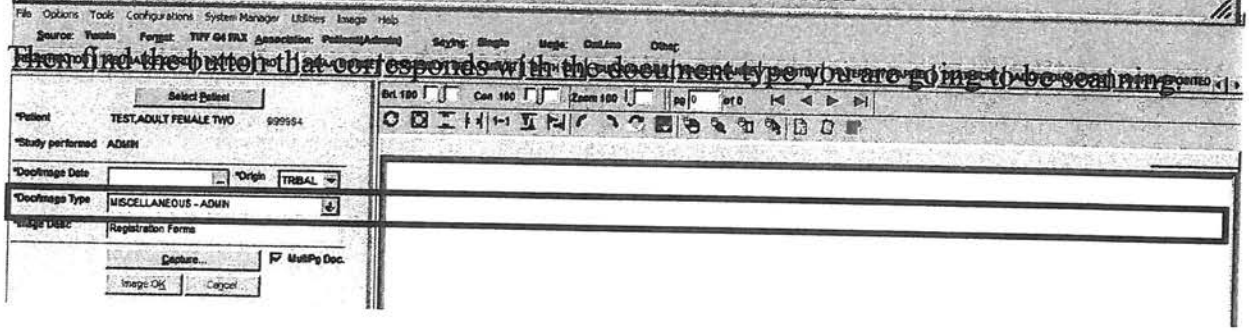
5. Select the patient in VistA Imaging that is specified on the document.



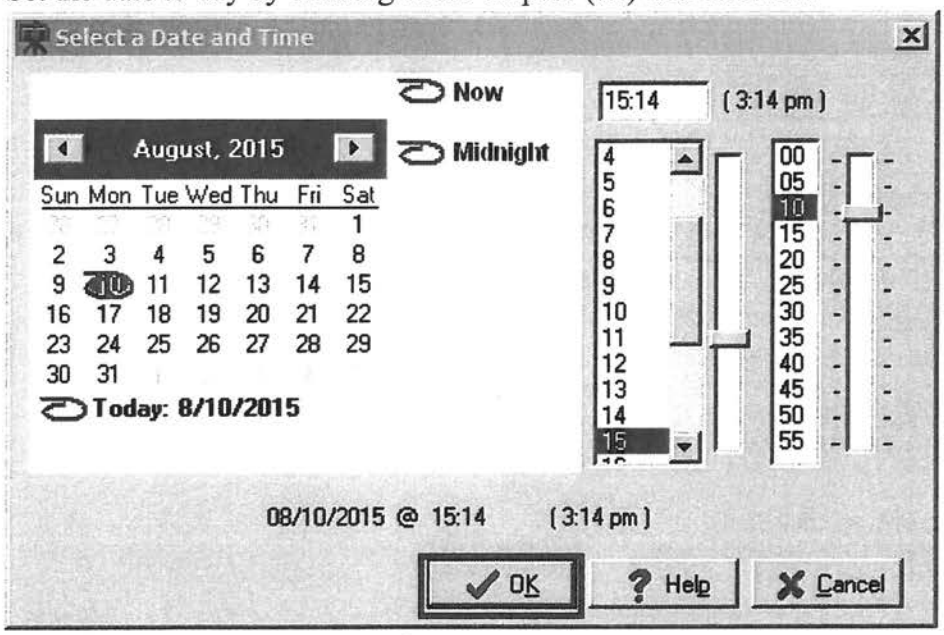
6. Type the patient name or Heath Record Number (HRN) in the box labeled **Patient** and hit **Enter** on your keyboard. Then select the correct patient from the list presented, double check the date of birth or HRN. Then click **OK.**



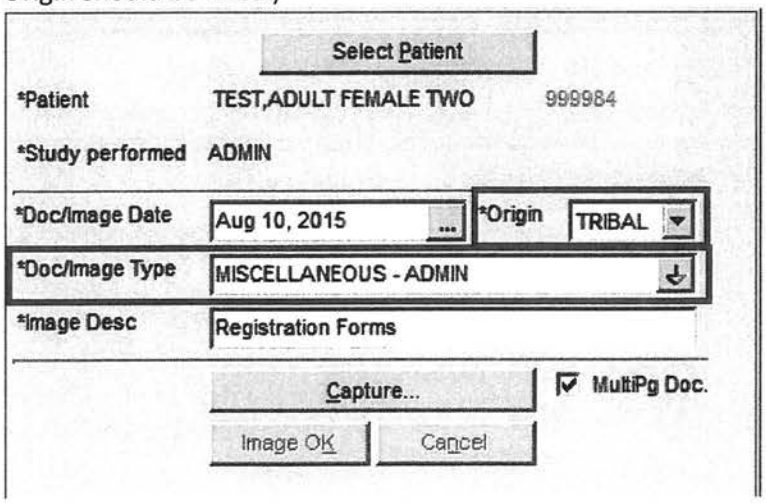
7. Then find the button that corresponds with the document type you are going to be scanning.



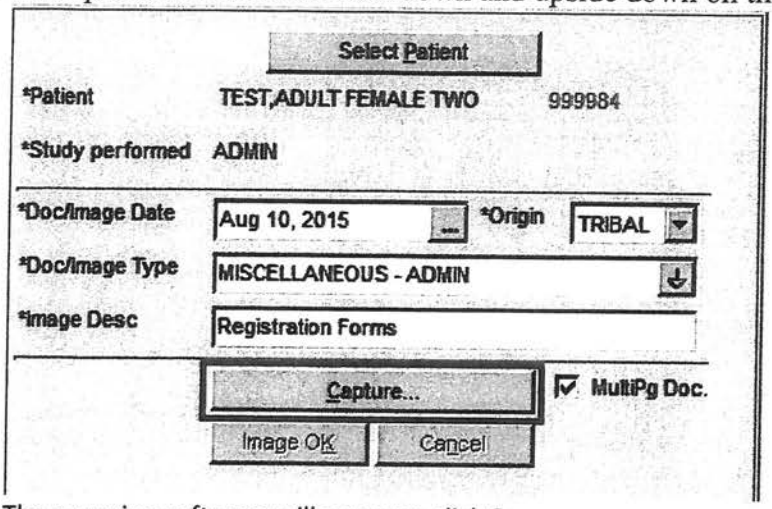
8. Set the date to day by clicking in the ellipses (…) and click **Ok**.



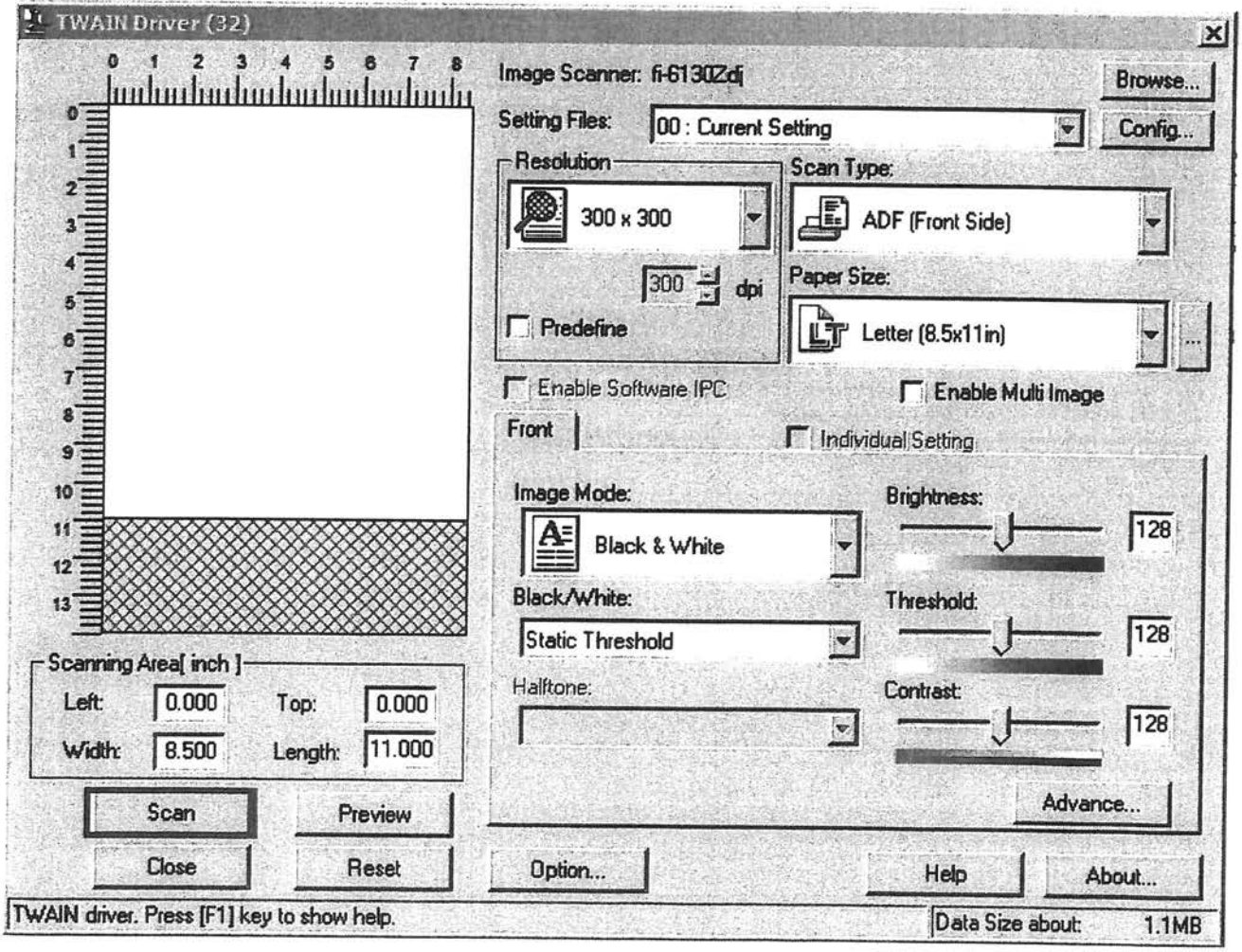
9. Double check the **Origin** and **Doc/Image Type** to make sure they match the document that you are scanning. (the Origin should be Tribal)



10. Then place the document face down and upside down on the scanner and click **Capture.**

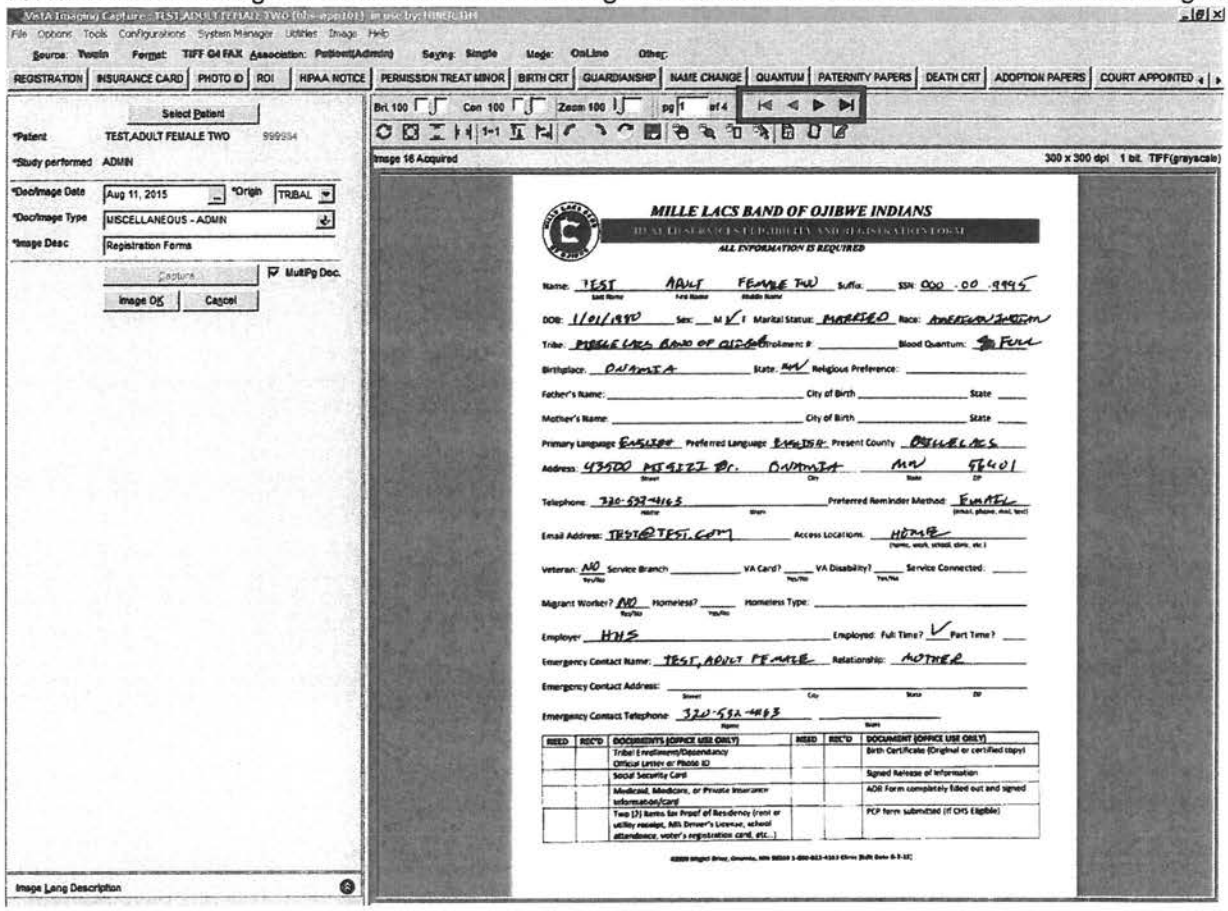


11. The scanning software will come up click **Scan.**

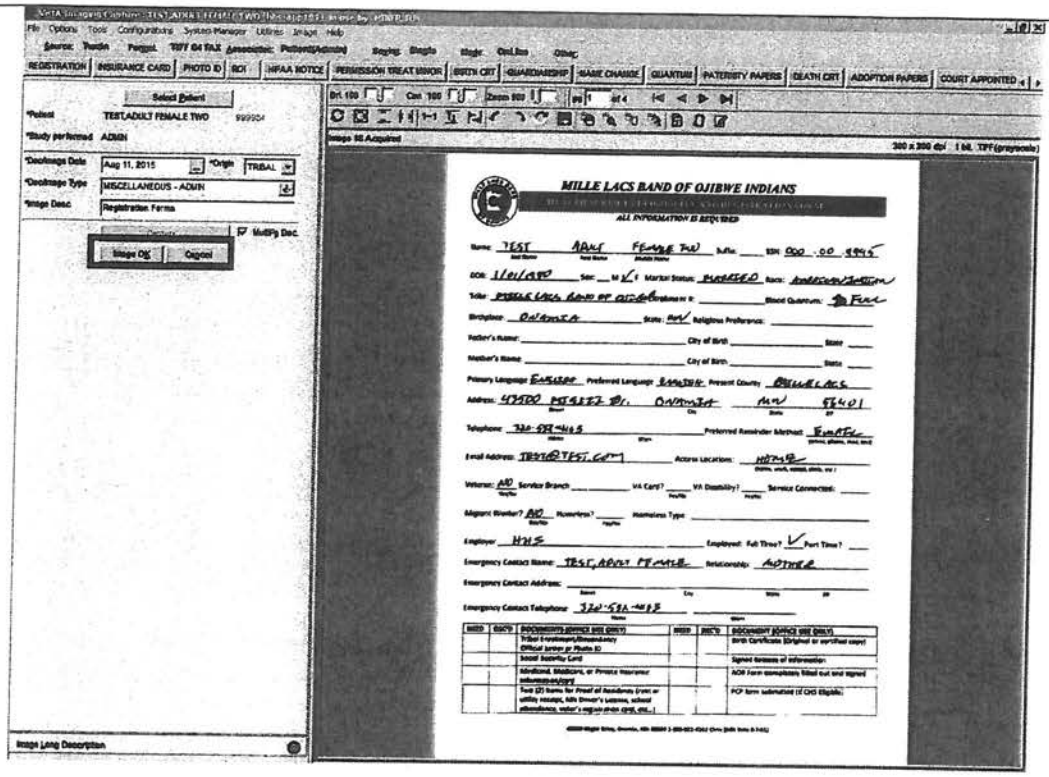


12. The scanner will scann the document. The document will show in the display window. Using the navigation buttons look through the document to make sure it is legible, that the right patient is selected and the right

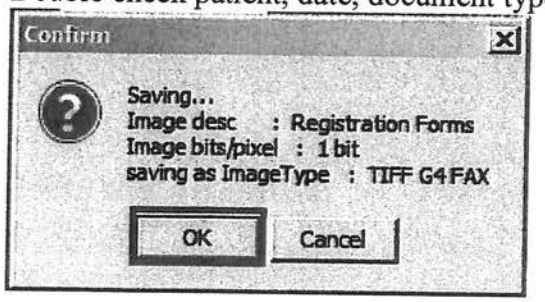
document type has been chosen. Make sure that the document is orintated correctly. (if it is not you will need to rescann it even thought there are buttons to change the orintation Vista does not save these changes.)



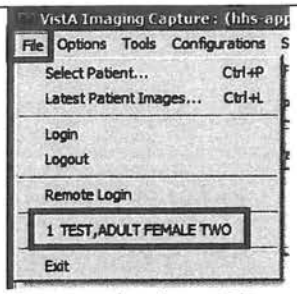
13. Once the document has passed the quality assessment click **Image Ok**. It the image needs to be rescanned click **Cancel**.



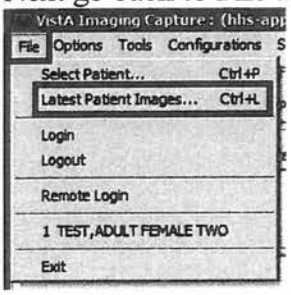
14. Another window will come up this is the last chance to catch mistakes before the document is saved. Double check patient, date, document type and the press **OK** to save or **Cancel** to fix any issues.



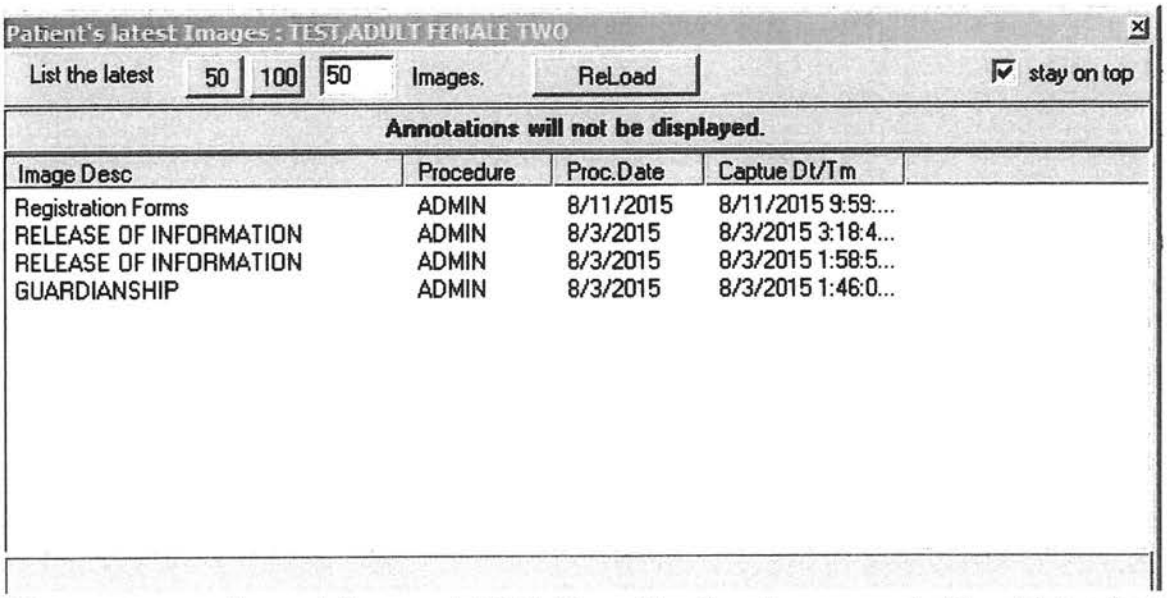
15. There will be a blue bar on the bottom of the screen that will go to 100%. The document parameters will clear including the patient. Make sure the document has saved properly, is legible and that the correct document type and patient have been picked by going to **File** and select the patient from the list. (Should be first on the list.)



16. Next go back to **File** and select **Latest Patient Images…**



17. A list of documents will display. The document that was just scanned will be the first one on the list. Double click the first document and it will show for review in the display window. Close the **Patient's latest Images** window and double check patient, document type, date and legibility.



18. Move on to scan the next document. Click **Cancel** to clear the screen start by picking the patient.