

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, 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.

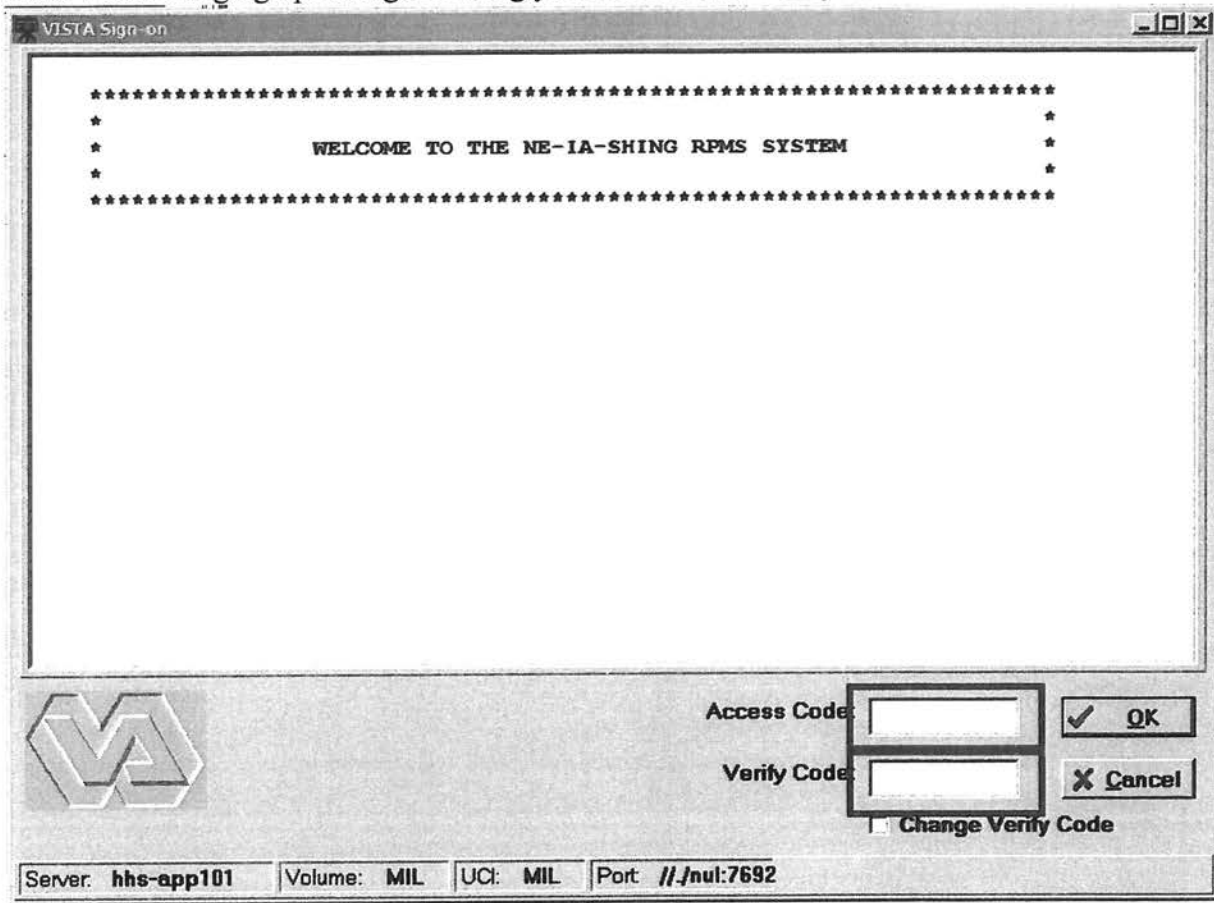
PROCEDURE: Scanning specialists are to be trained prior to scanning any document into VistA Imaging component. Competency of 10 scanned documents for administrative documents as well as clinical documents is necessary. Signature on file of those who have completed training as well as the date completed 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 |

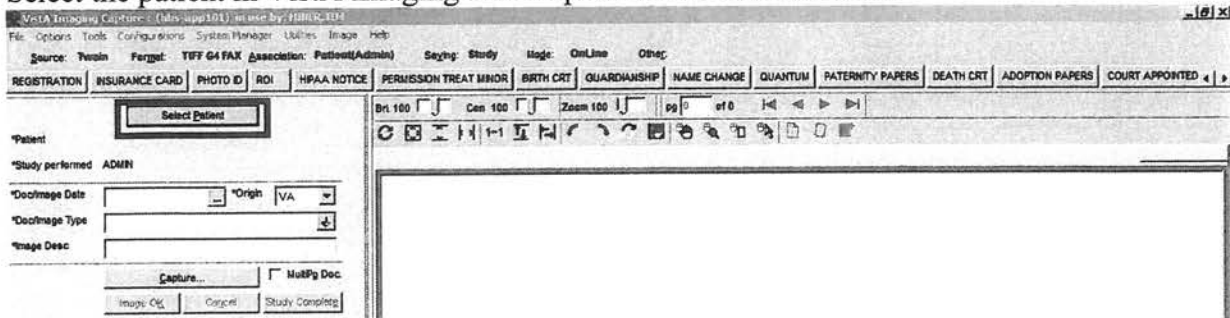
VISTA IMAGING SCANNING PROCESS

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



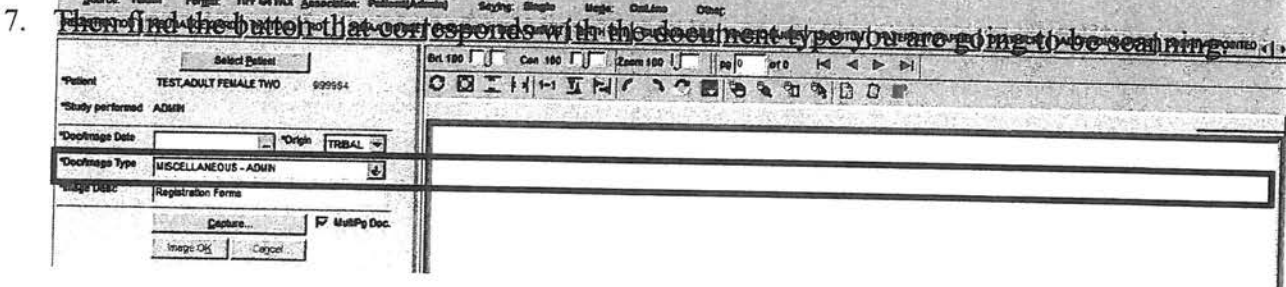
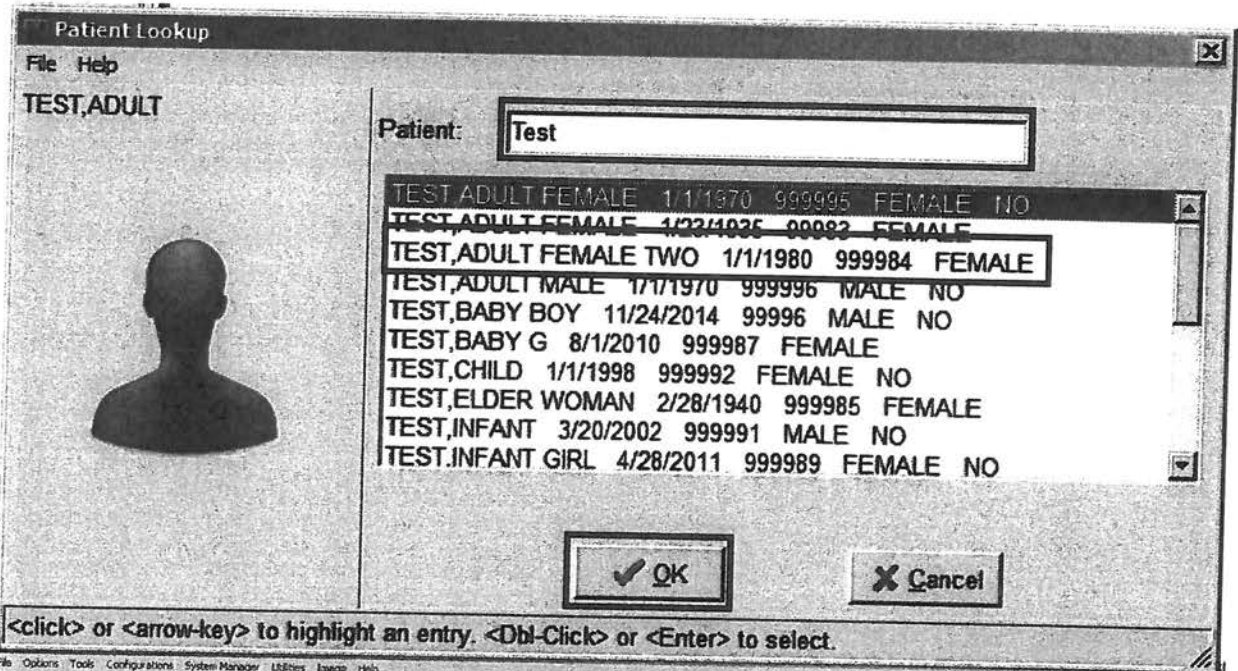
3. Pick up the document to scan and determine its document type.
4. Check the approved document list to make sure the document is on the approved list.
5. Select the patient in VistA Imaging that is specified on the document.



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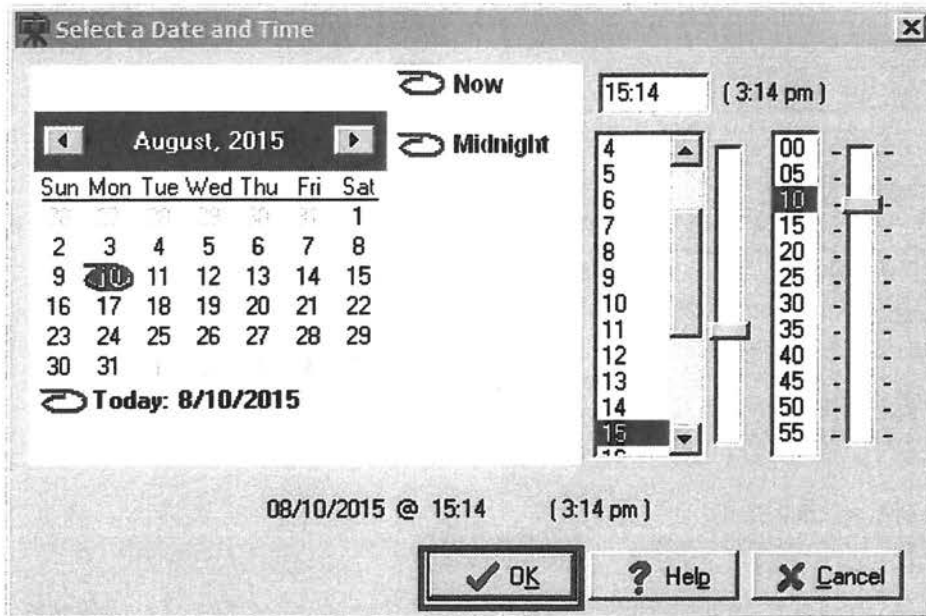
6. Type the patient name or Heath Record Number (HRN) in the box labeled **Patient** and hit **Enter** on your keyboard. Then select the correct patient from the list presented, double check the date of birth or HRN. Then click **OK**.



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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)

The screenshot shows a form for patient selection and scanning options. At the top is a 'Select Patient' button. Below it, the patient information is displayed: '*Patient TEST,ADULT FEMALE TWO 999984'. The '*Study performed' field is 'ADMIN'. The '*Doc/Image Date' is 'Aug 10, 2015' with an ellipsis button. The '*Origin' dropdown is set to 'TRIBAL'. The '*Doc/Image Type' dropdown is set to 'MISCELLANEOUS - ADMIN'. The '*Image Desc' field contains 'Registration Forms'. At the bottom, there is a 'Capture...' button, a checked 'MultiPg Doc.' checkbox, and 'Image OK' and 'Cancel' buttons.

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

A dialog box for patient selection and capture. It contains the following fields and controls:

- Select Patient** button
- *Patient: TEST,ADULT FEMALE TWO 999984
- *Study performed: ADMIN
- *Doc/Image Date: Aug 10, 2015
- *Origin: TRIBAL
- *Doc/Image Type: MISCELLANEOUS - ADMIN
- *Image Desc: Registration Forms
- Capture...** button
- MultiPg Doc.
- Image OK and Cancel buttons

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

The TWAIN Driver (32) interface for an Image Scanner: fi-6130Zd. It features a preview window on the left with a ruler and a scanning area. The right side contains various settings:

- Setting Files: 00 : Current Setting
- Resolution: 300 x 300 dpi
- Scan Type: ADF (Front Side)
- Paper Size: Letter (8.5x11 in)
- Image Mode: Black & White
- Brightness: 128
- Black/White: Static Threshold
- Threshold: 128
- Half-tone: [Slider]
- Contrast: 128
- Buttons: Scan, Preview, Close, Reset, Option..., Advance..., Help, About...
- Status bar: TWAIN driver. Press [F1] key to show help. Data Size about: 1.1MB

12. The scanner will scan 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

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

META Imaging Capture: TEST,ADULT,FEMALE,TWO (014-000101) in use by: HIRSH, D.H.

File Options: Tools Configurations System Manager Utilities Image Help

Source: **Yvstin** Format: **TIFF G4 FAX** Association: **Patient(Admin)** Says: **Single** Mode: **On-Line** Other:

REGISTRATION INSURANCE CARD PHOTO ID ROI HPAA NOTICE PERMISSION TREAT MINOR BIRTH CRT GUARDIANSHIP NAME CHANGE QUANTUM PATERNITY PAPERS DEATH CRT ADOPTION PAPERS COURT APPOINTED

Bit: 100 Con: 100 Zoom: 100 pg 1 of 4

Image 16 Acquired 300 x 300 dpi 1 bit TIFF (grayscale)

Select Patient

*Patient: TEST,ADULT,FEMALE,TWO 999254

*Study performed: ADMIN

*DocImage Date: Aug 11, 2015 *Origin: TRIBAL

*DocImage Type: MISCELLANEOUS - ADMIN

*Image Desc: Registration Forms

Image 05 Cancel

MILLE LACS BAND OF OJIBWE INDIANS
 ID AND RESIDENCE PERMITS AND REGISTRATION FORM
 ALL INFORMATION IS REQUIRED

Name: TEST ADULT FEMALE TWO Suffix: SSN: 000-00-9995

DOB: 1/01/1990 Sex: M Female Marital Status: MARRIED Race: AMERICAN INDIAN

Tribal: MILLE LACS BAND OF OJIBWE INDIANS Enrollment #: 99 Blood Quantum: Full

Birthplace: DANBURY State: NY Religious Preference: _____

Father's Name: _____ City of Birth: _____ State: _____

Mother's Name: _____ City of Birth: _____ State: _____

Primary Language: ENGLISH Preferred Language: ENGLISH Present County: OSHELWAS

Address: 43900 MISSISSIPPI DR. DANBURY NY 12801

Telephone: 320-527-4165 Preferred Reminder Method: EMAIL

Email Address: TEST@TEST.COM Access Location: HOTMAIL

Veteran: NO Service Branch: _____ VA Card? No VA Disability? No Service Connected: _____

Migrant Worker? NO Homemaker? No Homeless Type: _____

Employer: HHS Employed: Full Time? No Part Time? Yes

Emergency Contact Name: TEST, ADULT FEMALE Relationship: MOTHER

Emergency Contact Address: _____

Emergency Contact Telephone: 320-527-4165

| NEED | REQ'D | DOCUMENT (OFFICE USE ONLY) | NEED | REQ'D | DOCUMENT (OFFICE USE ONLY) |
|------|-------|--|------|-------|--|
| | | Tribal Enrollment/Disenrollment | | | Birth Certificate (Original or certified copy) |
| | | Official Letter or Photo ID | | | Signed Release of Information |
| | | Social Security Card | | | ADR Form completely filled out and signed |
| | | Individual, Medicare, or Private Insurance Information/Card | | | PCP form submitted (if CHS Eligible) |
| | | Two (2) Items for Proof of Residency (rent or utility receipts, MS Driver's License, school attendance, voter's registration card, etc.) | | | |

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

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The screenshot shows the VISTA Imaging software interface. The main window displays a patient registration form for the Mille Lacs Band of Ojibwe Indians. The form includes the following fields and values:

- Name: TEST ADULT FEMALE TWO
- DOB: 11/11/1910
- Address: 54700 MILE LACS RD, ONTOGENA, MN 55401
- Telephone: 320-584-4115
- Emergency Contact Name: TEST, ADULT FEMALE
- Emergency Contact Telephone: 320-584-4115

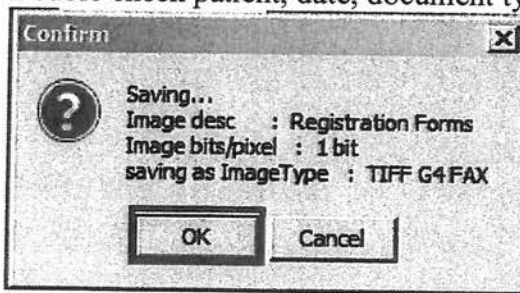
A 'Confirm' dialog box is overlaid on the form, displaying the following information:

Confirm

Saving...
 Image desc : Registration Forms
 Image bits/pixel : 1 bit
 saving as ImageType : TIFF G4 FAX

Buttons: OK, Cancel

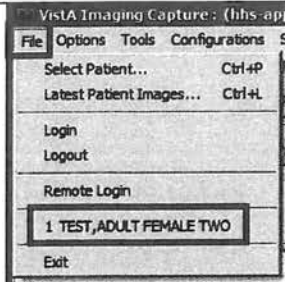
- Another window will come up this is the last chance to catch mistakes before the document is saved. Double check patient, date, document type and the press **OK** to save or **Cancel** to fix any issues.



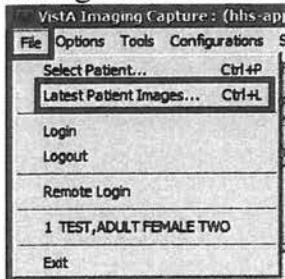
- There will be a blue bar on the bottom of the screen that will go to 100%. The document parameters will clear including the patient. Make sure the document has saved properly, is legible and that the correct document type and patient have been picked by going to **File** and select the patient from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

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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.

| Image Desc | Procedure | Proc.Date | Capture Dt/Tm |
|------------------------|-----------|-----------|--------------------|
| Registration Forms | ADMIN | 8/11/2015 | 8/11/2015 9:59:... |
| RELEASE OF INFORMATION | ADMIN | 8/3/2015 | 8/3/2015 3:18:4... |
| RELEASE OF INFORMATION | ADMIN | 8/3/2015 | 8/3/2015 1:58:5... |
| GUARDIANSHIP | ADMIN | 8/3/2015 | 8/3/2015 1:46:0... |

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