



# Quick Sheet: Installing and Configuring Scanning within doc2MD

**Overview:** There are three types of scanning that may be performed within the doc2MD software system:

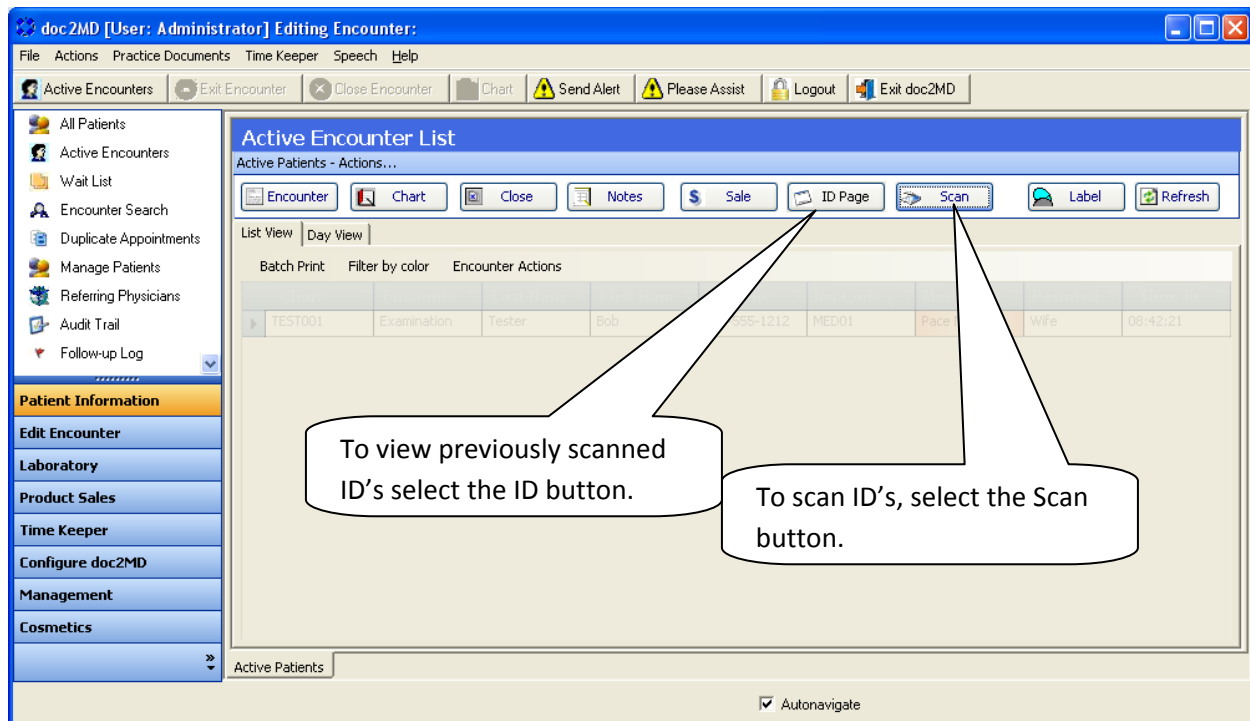
1. Scanning of driver's license or other form of identification.
2. Scanning of individual sheets of paper – typically a consult letter or just a one page document.
3. Scanning of bulk documents such as Super Bills, EOB's or archiving of Chart documents.

For scanning with option 1 and 2 above, follow the instructions that accompany the scanners to ensure that they are properly installed and configured.

## Scanning Identification Cards

- Recommended Scanner : Ambir Technology ID Card Scanner [www.ambir.com](http://www.ambir.com)

Step 1: From the Active Encounter screen, choose the patient for which you have ID's to scan and then press the Scan button.



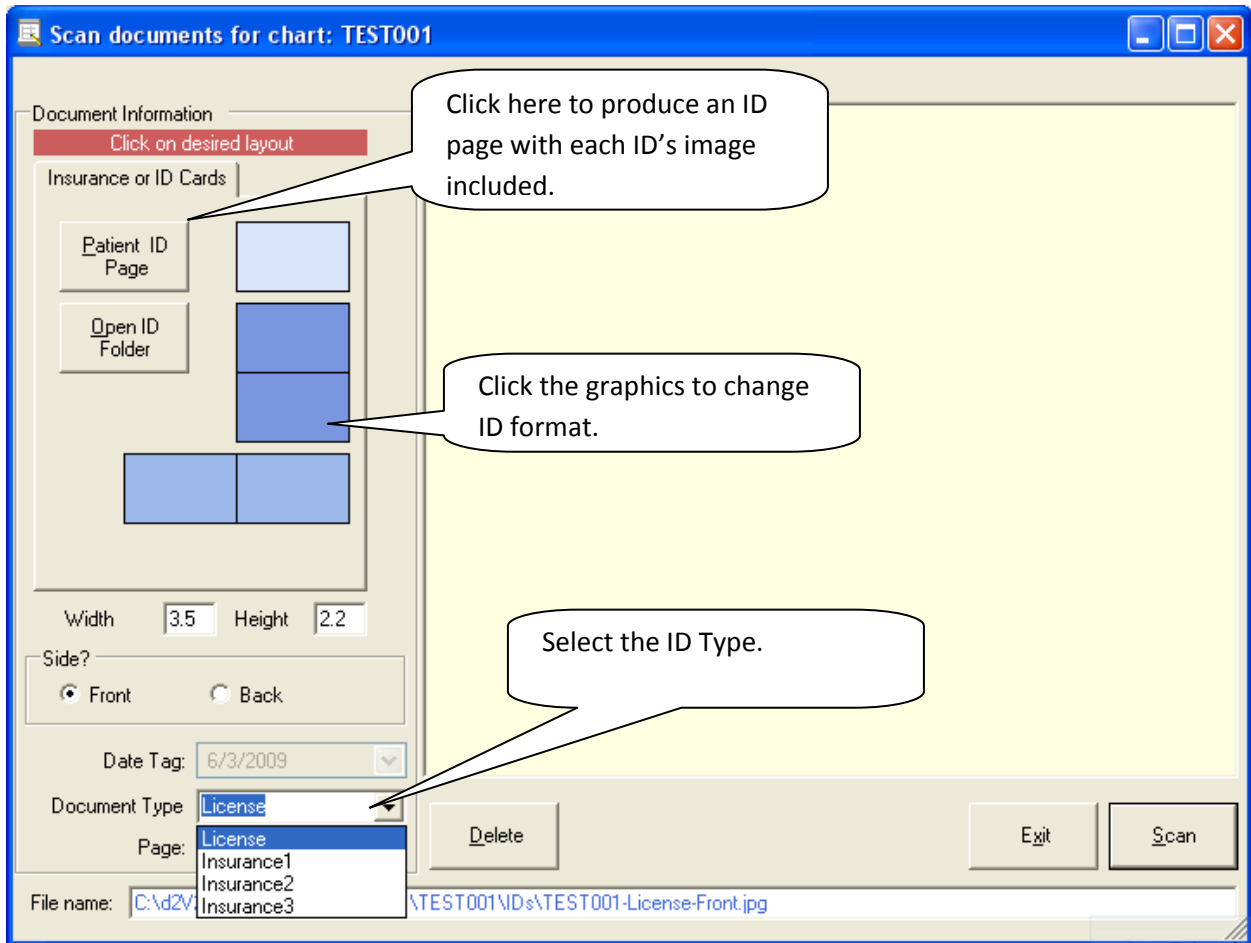
The Scan form will display allowing you to choose the document format to be scanned.

Step 2: Either click on the graphic representing the dimensions of the card, or enter the dimensions manually.

Step 3: Select the document type from the drop down list.

Step 4: Select the side of the card that you are scanning (Front/Back).

Step 5: Press the scan button.

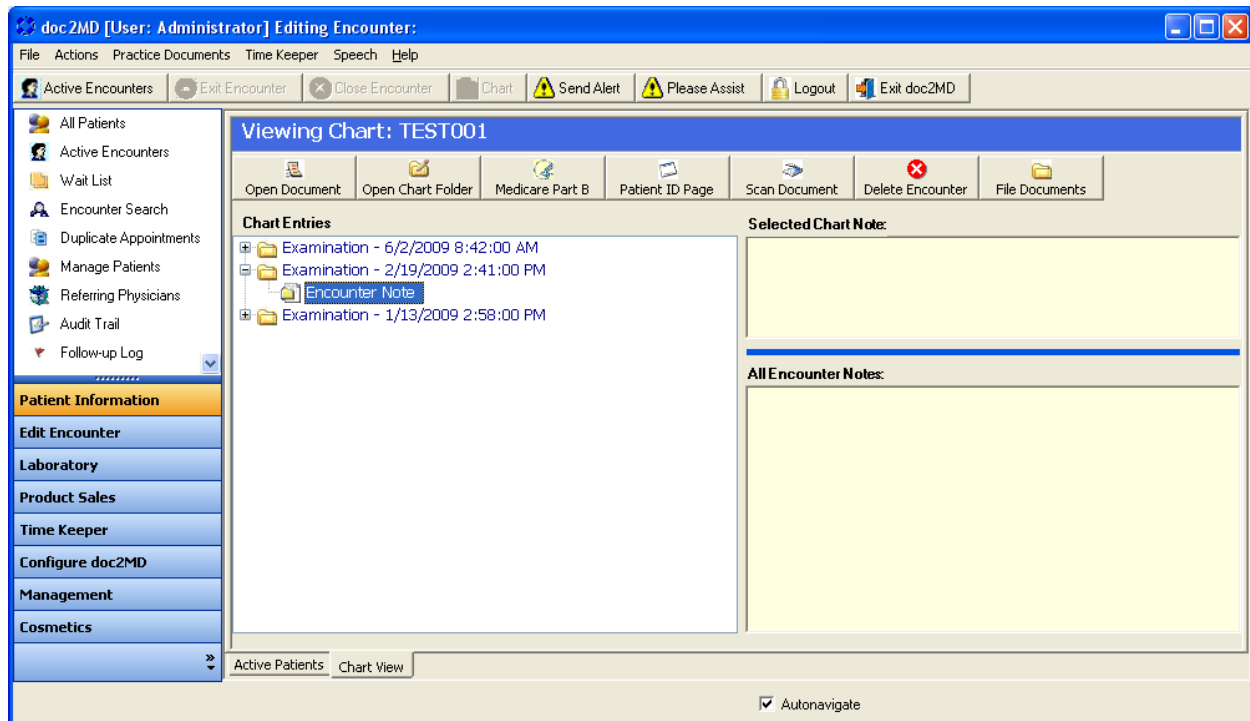


## Scanning Single (or a few) Pages

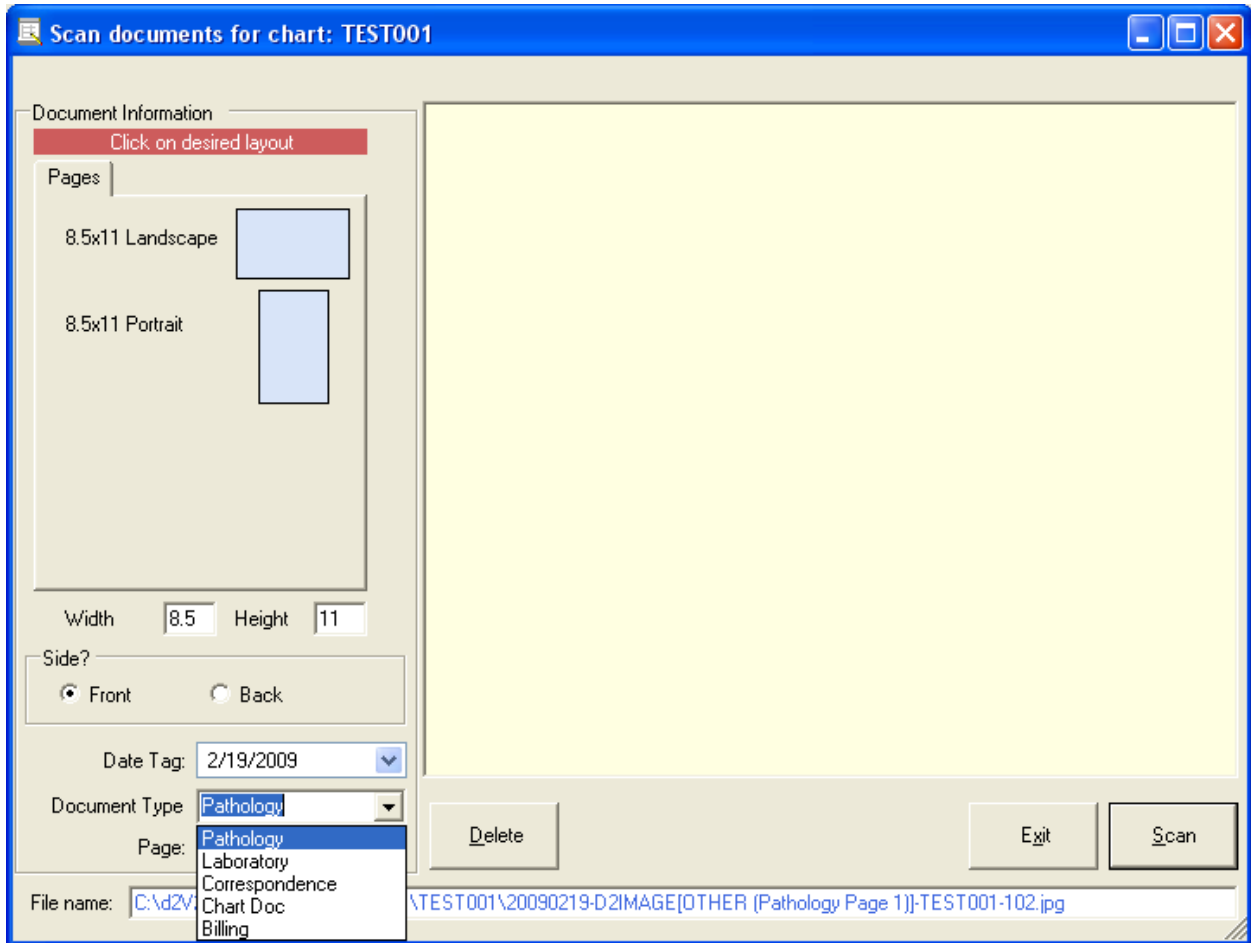
- Recommended Scanner : Ambir Technology Document Scanner [www.ambir.com](http://www.ambir.com)

Chart documents are scanned from the Chart View form of doc2MD. To navigate to the Chart View, select the patient from the Active Encounter List and press the Chart button or from the All Patient's view search for the desired patient and press the View Chart button.

Step 1: Select an encounter note from the chart tree. Scanned chart documents are associated with an existing encounter note and cannot be imported unless the note has been clicked as depicted below.



Step 2: Once the note has been selected, press the Scan Document button on the toolbar.



Step 3: Choose the document format (landscape or portrait) by clicking on the graphic depiction.

Step 4: Choose the Side (if applicable) of the document to be scanned along with the Document Type. The Date Tag is retrieved from the selected Encounter Note however it may be changed at this point.

Step 5: Press the scan button to scan the document.

## High Speed Scanning

- Recommended Scanner : Sharp “Copier/Printer/Scanner” [www.sharpusa.com](http://www.sharpusa.com)
  - The scanner should support scanning to a FTP site. Check with your dealer to ensure that it does.

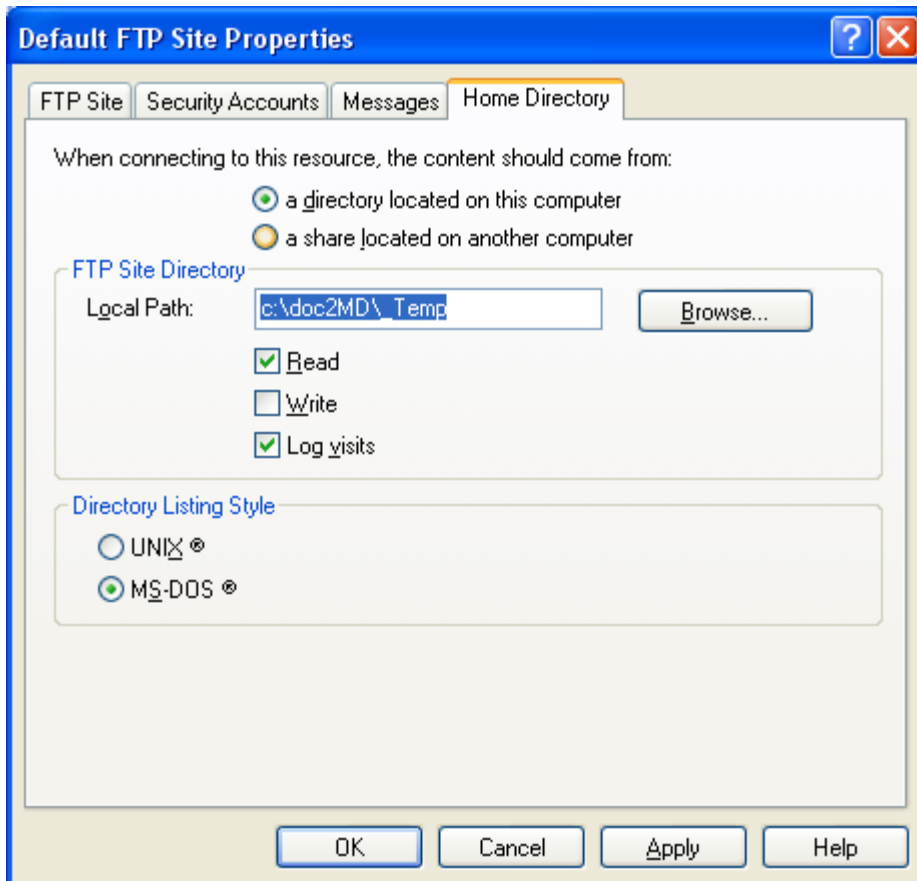
Describing High Speed Scanning:

Some scanners (such as recommended above) support scanning directly to a hard drive via FTP (File Transport Protocol). What that means is that there is no additional need for software to scan documents – the scanner does it all for you. Within the configuration options of these scanners, you can select the destination computer and folder for the documents to be saved.

The doc2MD software system supports these kinds of high speed scanners only. The balance of this document will describe how to setup a high speed scanner as described above to work with doc2MD.

**The following must be performed by your local computer engineer.**

Configure the server that currently acts as the archive location for documents in doc2MD so that it is also a FTP server (you may need to install Internet Information Server). On the FTP server properties, set the Home Directory equal to the \_Temp folder within the archive folder.



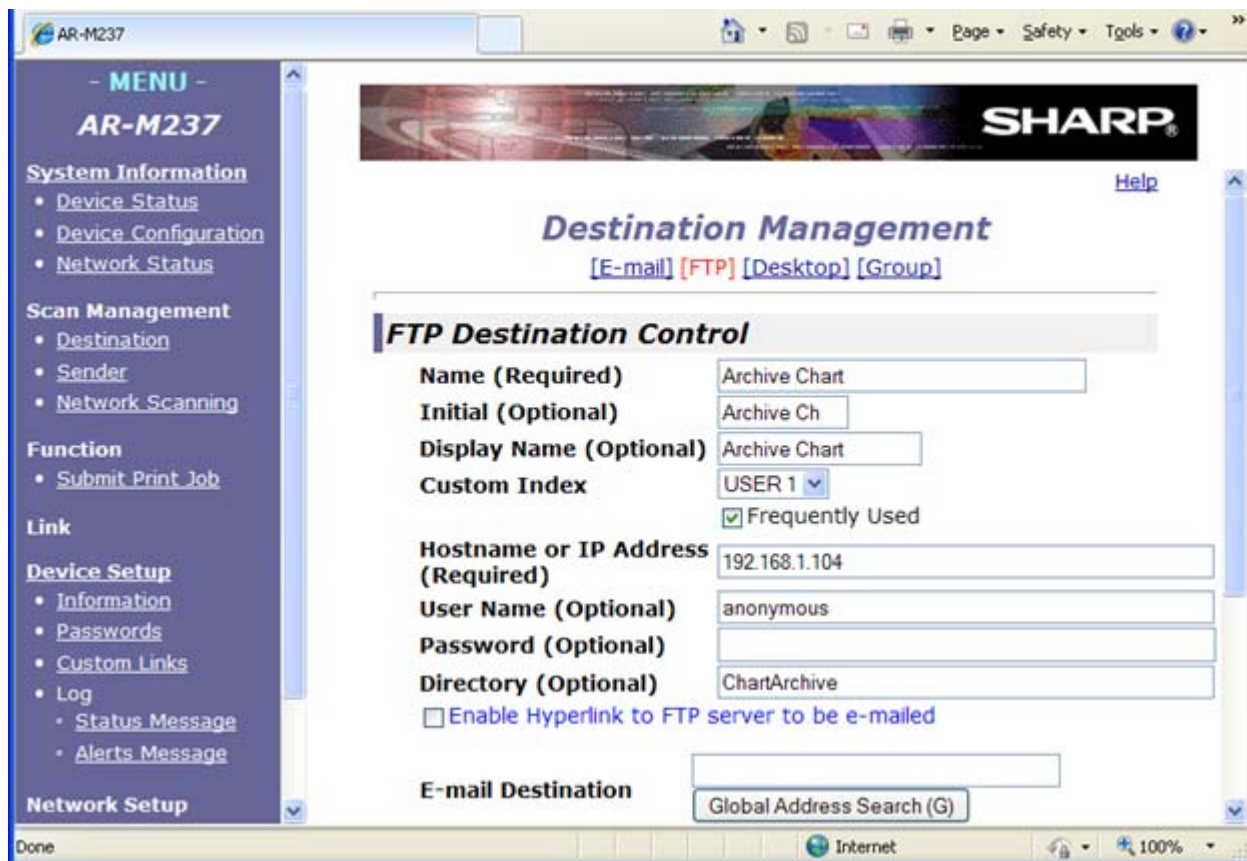
Note the IP address for the FTP server as you may need it for the scanner configuration.

In the FTP folder(\_Temp), create organizational directories as defined by the practice. Typically, these could be:

- ChartArchive
- ChartAudit
- EOBs
- Other

From the scanner software interface create a FTP Destination

for each folder that points to the FTP host IP Address and folder combination. **Note: Take note of the root folder for the FTP site as you will need it to configure doc2MD.**

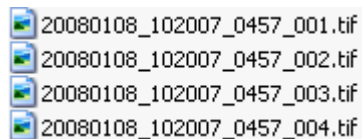


The above example is from a Sharp AR-M237. Your version may be different.

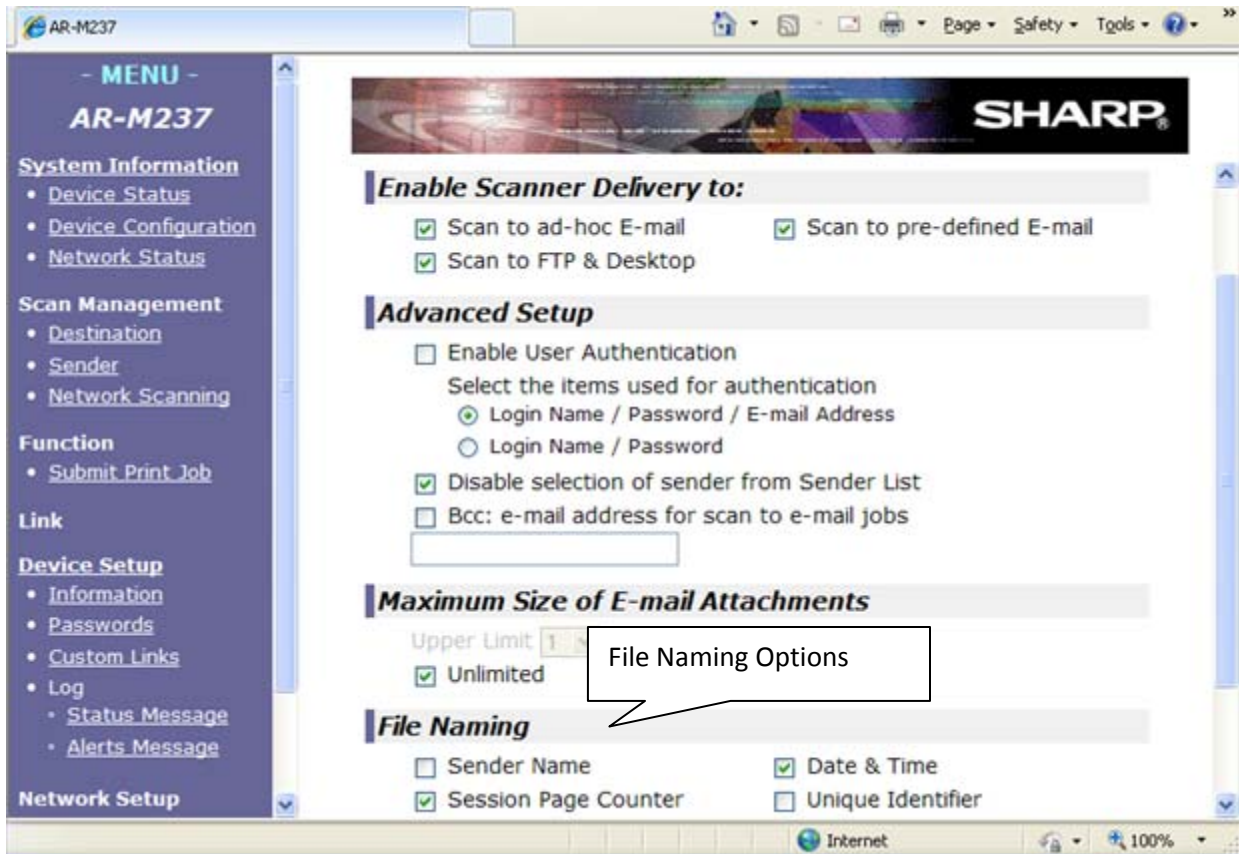
Under the Scanner's Network Scanning Option Select the following options:

- File Naming – Date & Time is checked
- File Naming – Session Page Counter is checked
- If possible, select to save the documents as in a TIF format.

By choosing the above options, the scanner will create an individual file for each page and name the files using a time and date stamp along with a session counter. The resulting documents names look like the following example:



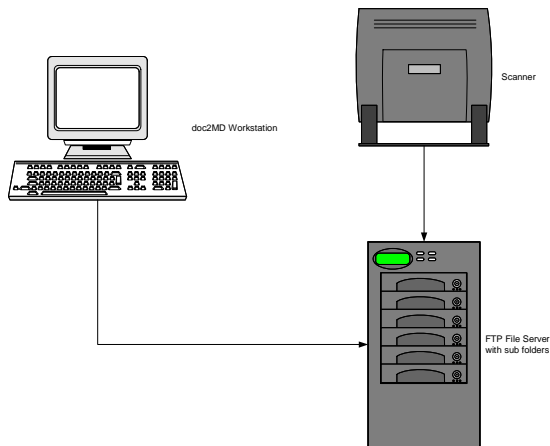
The example depicts a series of 4 documents scanned in a batch on January 8<sup>th</sup> of 2008 at 10:20 AM. Each of the documents in the batch was given an individual counter (001-004)



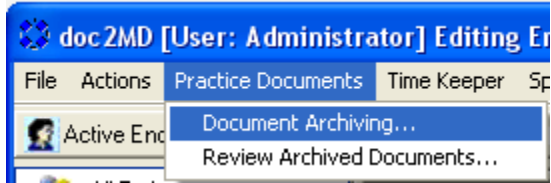
**Testing the Scanner Configuration:**

From the Scanner, follow the instructions to scan documents to the "Other" folder. If successful, then the scanner configuration is complete. If not successful, check the rights on the FTP server or review the message on the Scanner LCD to determine the steps to correct the configuration.

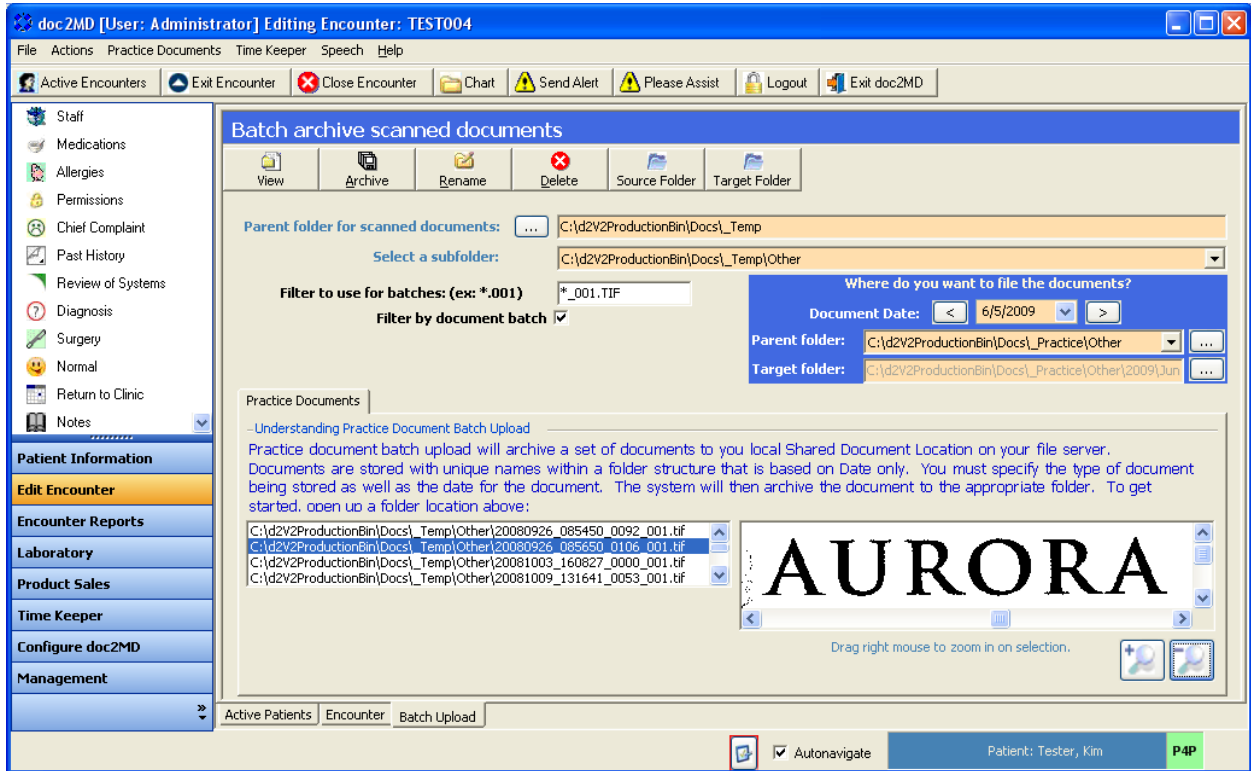
Once the configuration is working properly, you may start doc2MD and configure it so that it can manage the documents scanned by the scanner.



## Configuring doc2MD to manage scanned documents:

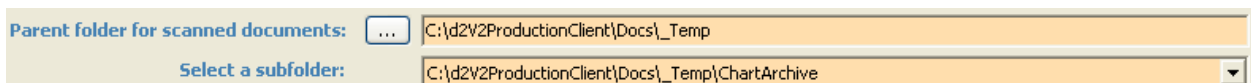


Choose Practice Documents | Document Archiving from the Main Menu to be presented with the Batch Archive Scanned Documents folder.



Step 1: Ensure that the Parent folder for scanned documents is set to the root folder of the FTP site. The folder location should have been noted by your network professional when setting up the FTP site above.

Step 2: Choose a sub folder from the drop down.



If documents exist they will be displayed in the left list panel.

Step 3: If the Scanner's File Naming configuration option was set correctly, you will see files similar to the dialog above. Click on Filter by document batch to view only the first document in the batch rather than all documents. Note: When scanning documents, keep them organizational together so that they may be filed as a batch rather than an individual document.

Step 4: Choose the target location for the documents. In the case of documents scanned for the practice in its entirety, you may choose the associated date to file the document under. By choosing the date, a folder will be created specifically for those documents on that date. For example

<\\Server\Docs\ Practice\EOBs\2009\Mar08>

Step 5: Press the Archive button to move the scanned documents from the temporary folder to the archive folder.

Step 6: Repeat steps above for each batch listed in the left list.

**To manage patient chart documents:**

Step 1: From the patient list, select the patient and then press the View Chart button.

Step 2: From the Chart dialog, press the Archive Documents button to be presented with the Batch Archive Scanned Documents dialog.