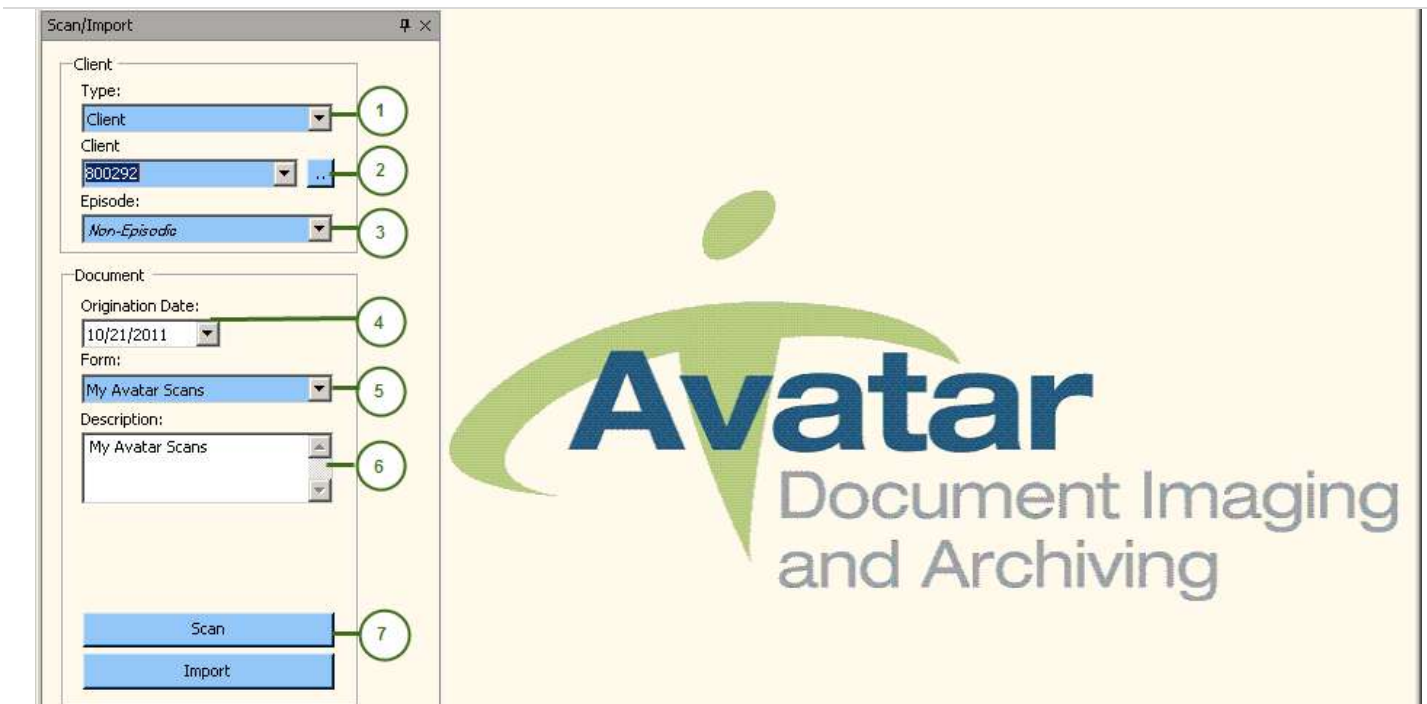


## CHAPTER 17 – DOCUMENT MANAGEMENT SCANNING

This chapter will cover how to scan a document from a scanner connected to the computer as well as how to import a document from a file on your computer or an attachment from an email. This feature allows you to scan historical paper charts in to a current electronic medical record system. A benefit of using document imaging is that documents are unalterable and become part of the client's electronic medical record. Staff is able to process medical records requests in an efficient and timely manner to better serve our clients.

### SCAN

<b>LOCATION</b>	CWS → Document Management → POS Scan
<b>PURPOSE</b>	The purpose of the POS Scan is to scan documents in to the client's electronic health record and integrate both paper documents and electronic documents for a client. Our goal is to assure that all clinical information is shared internally in an effective and efficient manner.
<b>RULES</b>	<ul style="list-style-type: none"> <li>• All documents must be scanned as NON EPISODIC</li> <li>• In the description enter the following: <ul style="list-style-type: none"> <li>○ Title of the document you are scanning</li> <li>○ The date that is in the document, such as assessment date; IEP date; lab date etc. etc.</li> <li>○ Where the document is coming from</li> <li>○ Example: "Lab Report 03/01/2012 Labcorp"</li> </ul> </li> </ul>
<b>STEPS</b>	<ol style="list-style-type: none"> <li>1. Select whether you will be scanning documents for client or Staff.</li> <li>1. Enter the client ID or for Staff enter the Staff ID</li> <li>2. Documents are not episode based. Select "Non Episodic" <b>DO NOT CHANGE</b></li> <li>3. Select the document's <b>Origination Date</b>. This field defaults to today's date. It is a required field <b>DO NOT CHANGE</b></li> <li>4. Select the Category to where you will be saving the document.</li> <li>5. For the document's <b>Description</b>, you may type additional information if necessary. This field defaults to the document's form name. There is a 100 character limit for the description</li> <li>6. Click the <b>Scan</b> button to scan a document into Document. The scanner interface displays, providing instructions on how to <ul style="list-style-type: none"> <li>• Change scanner settings</li> <li>• Specify the number of pages of the document</li> <li>• Preview the image</li> <li>• Rotate and adjust the image (viewing purposes only)</li> </ul> </li> </ol>



When the scan is complete, the Avatar Document Imaging and Archiving - POS screen displays again, along with the documents that were scanned. If there were multiple pages scanned in, each page can be accessed using the arrow buttons in the toolbar.

If you find a document that is scanned in to the wrong persons chart, or in to the wrong category, please submit an Error Report categorizes as "Scanning Error"

Avatar Document Imaging and Archiving - POS

File

Page 1 of 1

Scan/Import

Client

Type: Client

Client: 7/1970 SSN: 111-22-3333

Episode: Non-Episodic

Document

Origination Date: 10/21/2011

Form: My Avatar Scans

Description: My Avatar Scans

Save File to Avatar

Close Document

2011

MyAvatar User Guide

**AVATAR**

Monterey County Behavioral Health  
Quality Improvement

Monterey County  
Health Department

If you are importing documents from a file or email, select import. Follow the directions on the next page.

## IMPORT (FROM THE SCAN FOLDER)

If you are using a Copier to scan your documents follow these steps prior to opening the POS Scan

### STEPS- IMPORTING A DOCUMENT

1. Select SCAN on the Copy Machine.
2. Select Menu
3. Select the template/file of where you want save the document.
4. Place the document in the feeder and hit SCAN.
5. Select JOB FINISH once you have scanned your document.
6. From the dropdown, select "Client"
7. Enter the client name or number
8. In Episode: Select Non-Episodic
9. The "Origination Date" is the date the document is scanned. **Do not** change this date.
10. Form: select from the dropdown menu the category of which the document falls under. See POS Scanning Categories list.
11. Description: Enter the description of the Document, for example if you are scanning labs, enter; Labs (where they came from and the date)
12. Click on "Import"

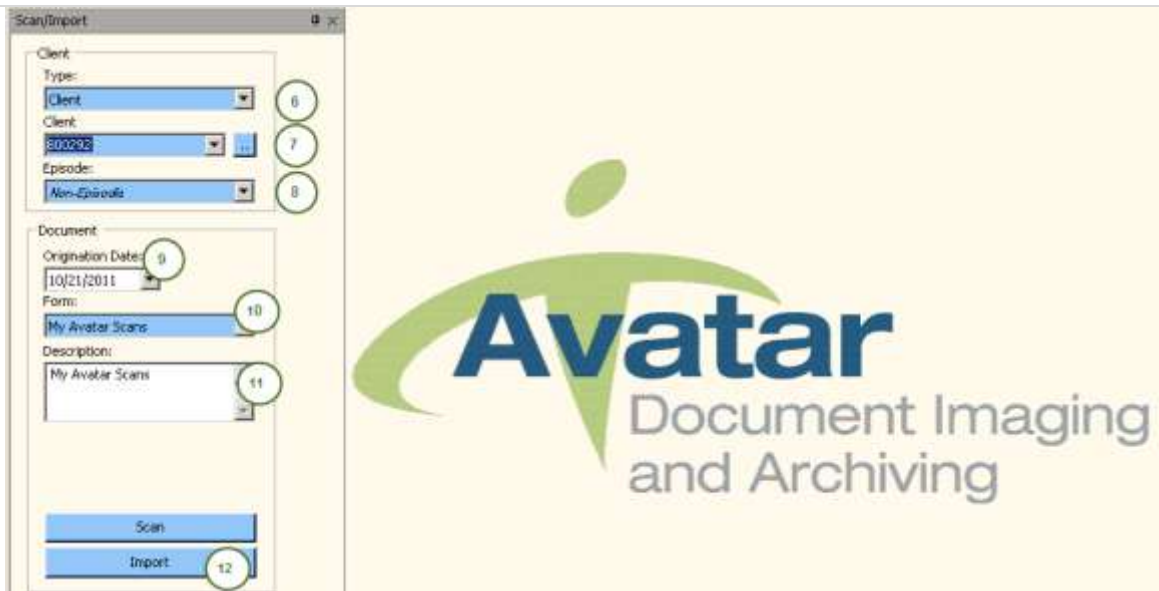


From the Avatar CWS menu, select Document Management, then POS Scan.  
(These steps can also be used for importing attachment from email)



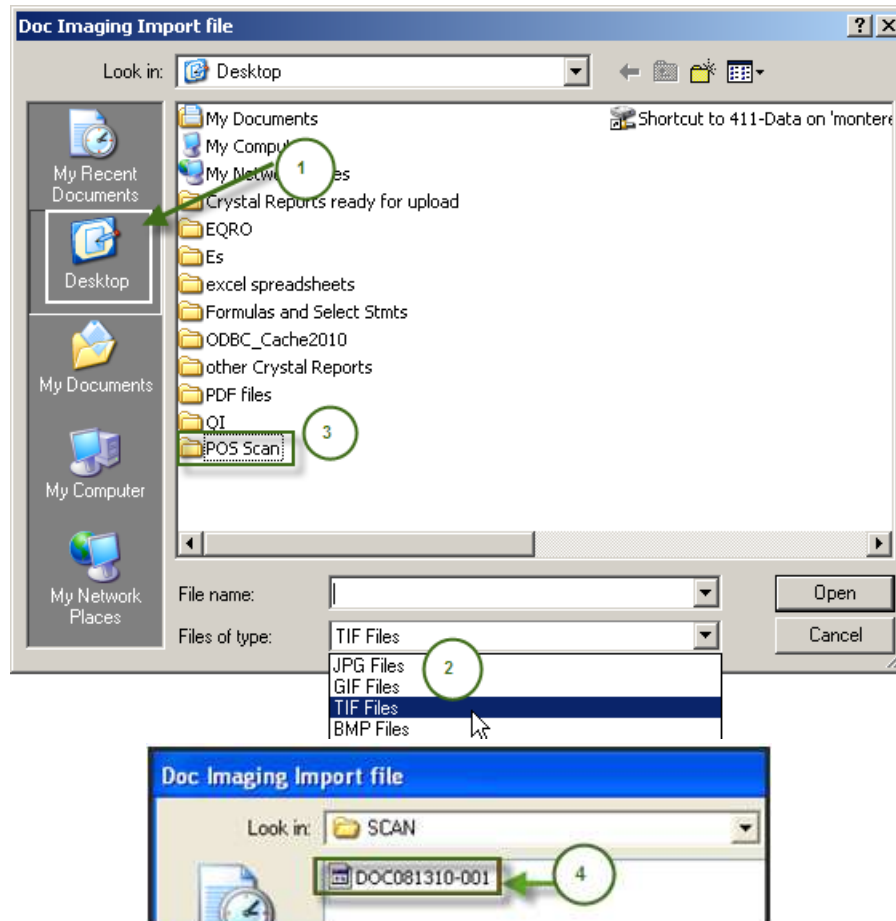
Your document will be saved on to a folder typically saved on your desktop for easy access.

On the copier, select the folder with your name on it. When you are prompted to select the scanned document

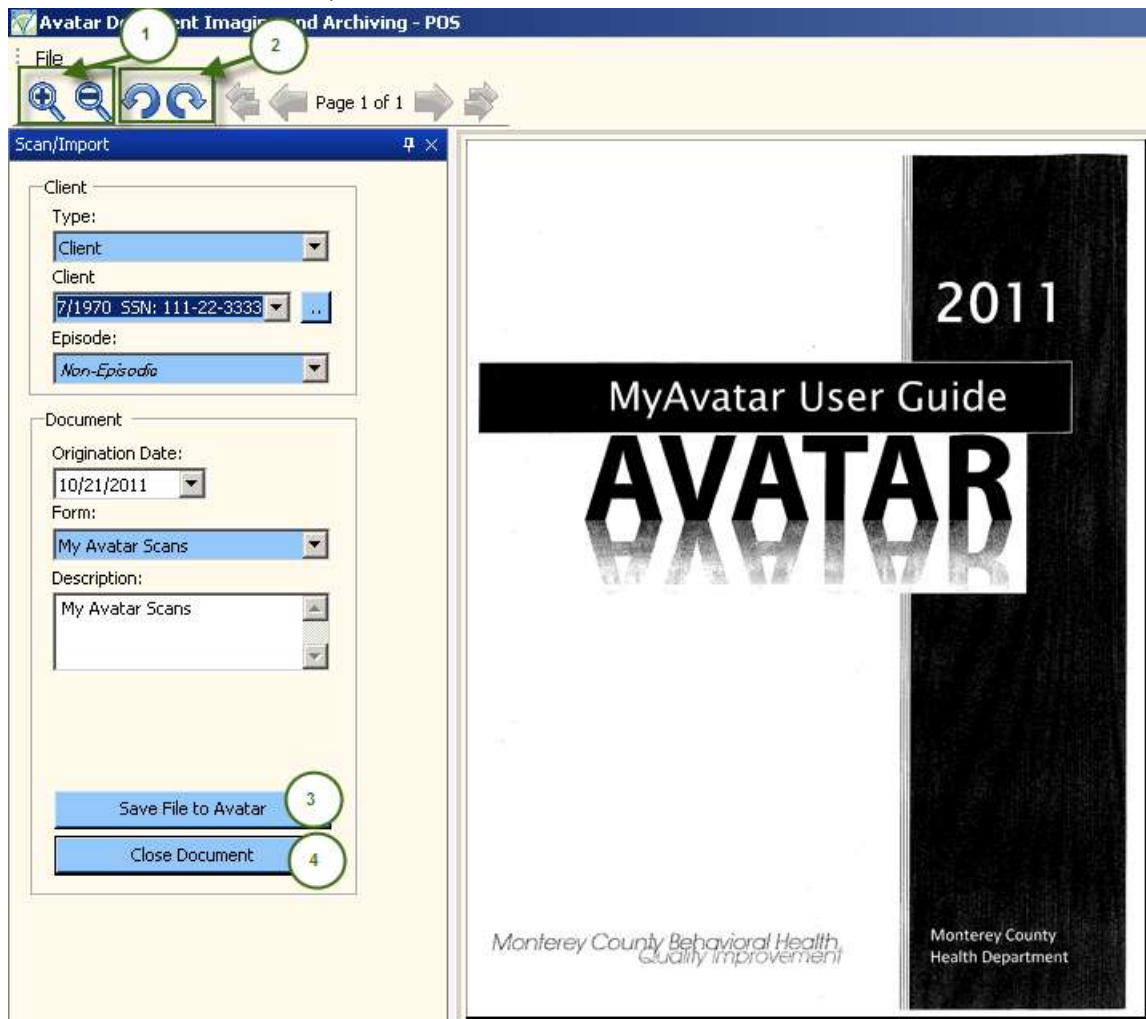





Select the image for the Scan folder.

1. Click on Desktop
2. From the Files of type: Select TIF Files.
3. Double click on the Scan Folder (this needs to have been programmed for you beforehand)
4. Double Click on the Document



After you double click on the document in the SCAN folder, you will be taken back to this screen. Review your information to make sure it is all complete.



1. If you want to maximize  or minimize  what you have scanned, click on the Icons at the top left hand corner of the screen.
2. If the document was imaged upside down, you can use these Icons  to rotate the document.
3. If the file is correct, save it by clicking "Save File to Avatar" once you save it, the screen will be back to its original setting.
4. Once you Save File to Avatar, the screen will automatically close, or you can close the screen without saving the information.

## SCANNED DOCUMENT CATEGORIES

**26.5 REFERRAL:** For 26.5 referrals from the schools

**ACCOUNT ADJUSTMENT:** Account Adjustment form received from the billing department when a clinician/PAR is adjusting the clients UMDAP information

**ADJUNCT ASSESSMENTS:** such as Assessments from the Crisis Unit

**AOD:** Alcohol and Other Drug Program Information

**APS/CPS MANDATED REPORTS:** Adult Protection Services and Child Protection Services – mandated reports

**BH CONSENT:** Signed consent forms

**CLINICAL DOCUMENTS:** Other documents not covered in the EMR that are generated from clinical staff.

**CONTROLLED SUBSTANCE PRESCRIPTIONS:** For medication prescriptions that require a controlled substance prescription be handed to the client.

**COURT/LEGAL DOCUMENTS:** Conservatorship documents, court orders, 5150, CPS reports, APS reports, CNC court updates, probation documentation, booking info, and attorney letters.

**FINANCIAL:**

**HISTORICAL CHART:** information previously in the paper chart

**PHOTO IDENTIFICATION:** Copy of the client's driver license or valid ID

**IEP (INDIVIDUALIZED EDUCATION PLAN):** for the Copy of the Individualized Education Plan

**INCOMING CORRESPONDENCE:** Documentation related to client's physical health care such as documents from primary care physicians and Letters coming into the clinic related to the client, **NOT** including legal correspondence or documents from service providers.

**INSURANCE, MEDI-CAL & MEDICARE CARD:** Copy of client's insurance cards, private, including Medi-cal and Medicare.

**LABS:** Labs received from multiple sources

**MEDICATION CONSENT:** Various medication consents signed by client given by MD

**MEDICATION PROGRESS NOTES:** Is used for historic progress notes that were in the client's paper chart.

**OUTGOING CORRESPONDENCE:** Letters sent from behavioral health office, such as letters from clinical staff.

**PROVIDER DOCUMENTATION:** Treatment plans from outside providers, treatments updates from providers, letters or other or other documentations related to services from a service provider (e.g., Interim inc., Kinship center, Manzanita, CHOMP, NMC discharge info. Crisis intake info, etc)

**REFERRAL:** Use this category for all Referrals except for the 26.5 Referral

**RELEASE OF INFORMATION:** The purple form signed by clients

**SSA LETTERS:** Letters or documents from The Social Security Administration related to benefits, and the request of medical records.

**TAR PACKET:** Treatment Authorization Requests that are received from hospitals

**CLIENT CORRESPONDENCE:** Jail letters, general letters, notes, drawings, poems, cards, etc, from clients to MD and clinicians

## VIEWING SCANNED DOCUMENTS FROM CHART VIEW

You are able to view scanned documents From CHART VIEW.

### STEPS- VIEWING SCANNED DOCUMENTS


On the left side of the screen, you will see a **Documents** Category.




1. Click on My Avatar Scans
2. Select the documents you want to view or Print
3. Press on the View button or on the Print Selected to Print
4. To close and go back to the chart view section

The screenshot displays a medical chart interface with a left sidebar and a main content area. The sidebar contains several categories: Clinician, My Forms-EMRSupportStaff, My Forms-SYSADM, and Documents. The Documents category is highlighted with a green box, and a red circle with the number '1' and an arrow points to the 'My Avatar Scans' option. The main content area shows an Overview section with tabs for Progress Notes, Client Notifications, Current Medications, Client Episodes, and Diagnosis. The Client Notifications tab is active, showing a 'Special Considerations: Yes' and 'TP Expiration' section. The Client Episodes tab shows a list of episodes with columns for EpProgram Name and Admiss. The Diagnosis tab shows a table of diagnoses with columns for Primary Dx, EpType, Code, and Diag.

Primary Dx	EpType	Code	Diag
PANIC DISORDER w/O	15Admission	300.01	PANI DISC w/O
AGORAPHOBIA			AGOI
BIPOLAR I DISORDER			BIPO DISC
SINGLE MANIC 4	Discharge	296.00	SING DISC



**Chart** 

Overview   **My Avatar Scans** Print All 

**Clinician**  
 Admission  
 Diagnosis  
 Update Client Data




**My Forms-EMRSupportStaff**  
 Diagnosis  
 Managed Care Authorizations  
 > Electronic Signature Agreement CL  
 > Case Coordinator  
 TAR Review Document  
 > Consent for Behavioral Health Ser  
 Utilization Review  
 Allergies and Hypersensitivities  
 Problem List  
 Client/Caregiver Education  
 Physical  
 Health and Review of Systems  
 Monterey County Treatment Plan  
 MC\_MORS  
 Psychosocial Assessment MC  
 Mental Status MC  
 Medical Necessity Criteria MC  
 CAFAS Assessment  
 MCSTART Developmental Assessm  
 > Medication Consent Form  
 Special Considerations  
 Treatment Plan Participation Const


**My Forms-SYSADM**  
 Financial Eligibility  
 Diagnosis  
 Managed Care Authorizations  
 > Consent for Behavioral Health Ser  
 Monterey County Treatment Plan  
 Psychosocial Assessment MC  
 Mental Status MC  
 Medical Necessity Criteria MC

**Documents**  
 My Avatar Scans





**Non-Episodic (3)** 16: TEST only (0) 08/23/2010 - Active 15: Access to Treatment Salinas (0) 08/19/2011 - 08/23/2011 14: ZADP Valley Health OP (0) 06/24/2011 - Active

	View	Print	Client ID	Client Name	Episode	Document Description
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	800292	CLIENT,TEST	Nonepisodic	My Avatar Scans
	<input type="checkbox"/>	<input type="checkbox"/>	800292	CLIENT,TEST	Nonepisodic	My Avatar Scans
	<input type="checkbox"/>	<input type="checkbox"/>	800292	CLIENT,TEST	Nonepisodic	My Avatar Scans

Document List View  Print Selected  Close All Documents 

**My Avatar Scans** Print All 




**Non-Episodic (3)** 16: TEST only (0) 08/23/2010 - Active 15: Access to Treatment Salinas (0) 08/19/2011 - 08/23/2011 14: ZADP Valley Health OP (0) 06/24/2011 - Active 13: Access CALWORKS (0) 06/23/2011 - 08/23/2011 12: ER Crisis NMC (0) 05/31/2011 - 08/23/2011 11: ... 05

← 1 of 1 → 50%     To rotate the page

To move from one page to the other

To minimize or maximize the screen

Please answer the following questions regarding your event:	Yes	No
Will event be open to the public?		✓
Will admssion be charged?		✓
Will event generate revenue or be a fundraiser?		✓
<b>If yes, please provide City of Roseville Business License #</b>		
Will your event have alcohol?		✓
Will you be selling alcohol?		✓
Will you be serving food?	✓	
Will you be selling food?		✓

Document List  CLIENT,TEST (800292) - My Avatar Scans View  Print  Close All Documents 

## VIEWING SCANNED DOCUMENTS FROM CLINICAL DOCUMENT VIEWER

<b>LOCATION</b>	CWS → Document Management → Clinical Document Viewer
<b>STEPS-VIEWING SCANNED DOCUMENTS</b>	<ol style="list-style-type: none"> <li>1. Select type: "Client"</li> <li>2. Select All or Individual Chart: "Individual"</li> <li>3. Enter the client ID or Client Name of the person you want to view the scanned documents for.</li> <li>4. For Episode: Select Non Episodic (Documents are scanned on a client level)</li> <li>5. Click on Process</li> <li>6. Select the documents you want to view</li> <li>7. Press on the View button</li> <li>8. To close and go back to the chart view section</li> </ol>

**Clinical Document Viewer**

Search Results

Select Search Criteria

1 Select Type: Client

2 Select All or Individual Chart: Individual

3 Select Client: TEST CLIENT (000800292)

4 Episode: Nonepisodic

User: [ ]

Document Status:  Final  Void

Document Source: [ ]

Document Origination Date Start: [ ] End: [ ]

Form Selection:  Entire Chart,  Legal Medical Record,  By Categories / Forms

Form Restrictions:  Do Not Print,  Do Not Release,  Archived Documents

Include:  Exclude:

5 Process Close

**Clinical Document Viewer**

Search Results

Search Results

- Client
  - CLIENT, TEST
- Form Categories
- Clinical Documentation

View	Client ID	Client Name	Episode	Document Description	Document Date	Document Status	Form Name	User	Do Not Release
<input checked="" type="checkbox"/>	800292	CLIENT, TEST	Nonepisodic	My Avatar Scans	Oct 12, 2011	Final	My Avatar Scans - Randall Requis		
<input type="checkbox"/>	800292	CLIENT, TEST	Nonepisodic	My Avatar Scans	Oct 18, 2011	Final	My Avatar Scans - Randall Requis		
<input type="checkbox"/>	800292	CLIENT, TEST	Nonepisodic	My Avatar Scans	Oct 21, 2011	Final	My Avatar Scans - Rosa E. Marsh...		

Document List

7 View Print Mail Close All Documents

My Avatar Scans Print All

Non-Episodic (3) 16: TEST only (0) 08/23/2010 - Active 15: Access to Treatment Salinas (0) 08/19/2011 - 08/23/2011 14: ZADP Valley Health OP (0) 06/24/2011 - Active 13: Access CALWORKS (0) 06/23/2011 - 08/23/2011 12: ER Crisis NMC (0) 05/31/2011 - 08/23/2011 11: 05

← 1 of 1 → 50% [Zoom In] [Zoom Out] [Rotate] ← To rotate the page

My Avatar Scans

To move from one page to the other

To minimize or maximize the screen

Please answer the following questions regarding your event:		
	Yes	No
Will event be open to the public?		✓
Will admisson be charged?		✓
Will event generate revenue or be a fundraiser?		✓
If yes, please provide City of Roseville Business License #		
Will your event have alcohol?		✓
Will you be selling alcohol?		✓
Will you be serving food?	✓	
Will you be selling food?		✓

Document List [x] CLIENT, TEST (800292) - My Avatar Scans

To Print records [Print] [Close All Documents]

8