

CHAPTER 17 – CLIENT DOCUMENT CAPTURE

This chapter will cover 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.

LOCATION	AvatarPM →Radplus Utilities →→ Document Management
PURPOSE	The purpose of the “Client Document Capture” is to be able 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.
RULES	<ul style="list-style-type: none">• All documents must be scanned as NON EPISODIC• In the description enter the following:<ul style="list-style-type: none">○ Title of the document you are scanning○ The date that is in the document, such as assessment date, IEP date, lab date, consent date, etc (NOT the date you are scanning)○ Where the document is coming from<ul style="list-style-type: none">▪ Example: “Lab Report 3/1/2016 Labcorp”
STEPS FOR SEARCHING	<ol style="list-style-type: none">1. In search forms type “Client Document Capture”2. In Client ID, enter the Client ID/name3. Leave the Episode Number drop down menu blank. Do not make a selection.4. Click “Launch POS Capture” This will launch the ImageNow6 application.

Search Forms

Name	Menu Path
Client Document Capture	Avatar PM / RADplus Utilities / Document Management

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Client Document Capture

Client POS Scan

Submit

Client ID: 800292

Client	DOB	SS#	Sex
CLIENT,TESTFIRSTNAME (800292)	07/01/2013	999-88-9999	Mal

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Client Document Capture

Client POS Scan

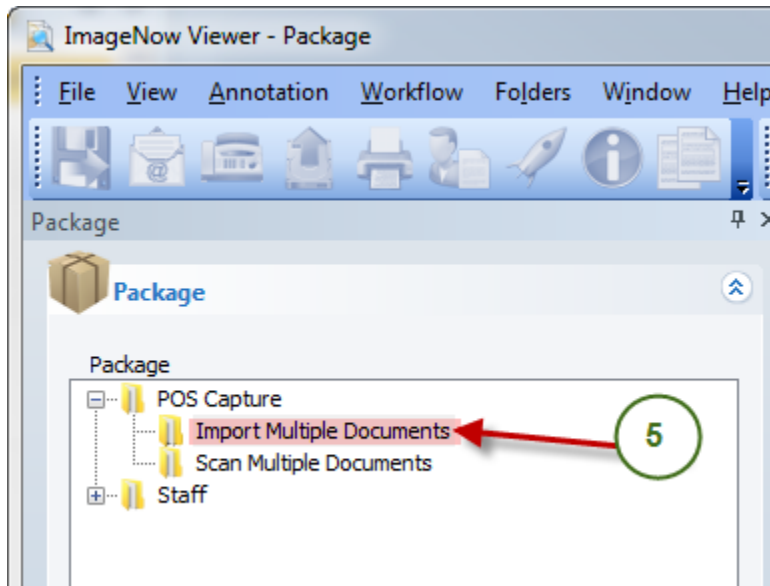
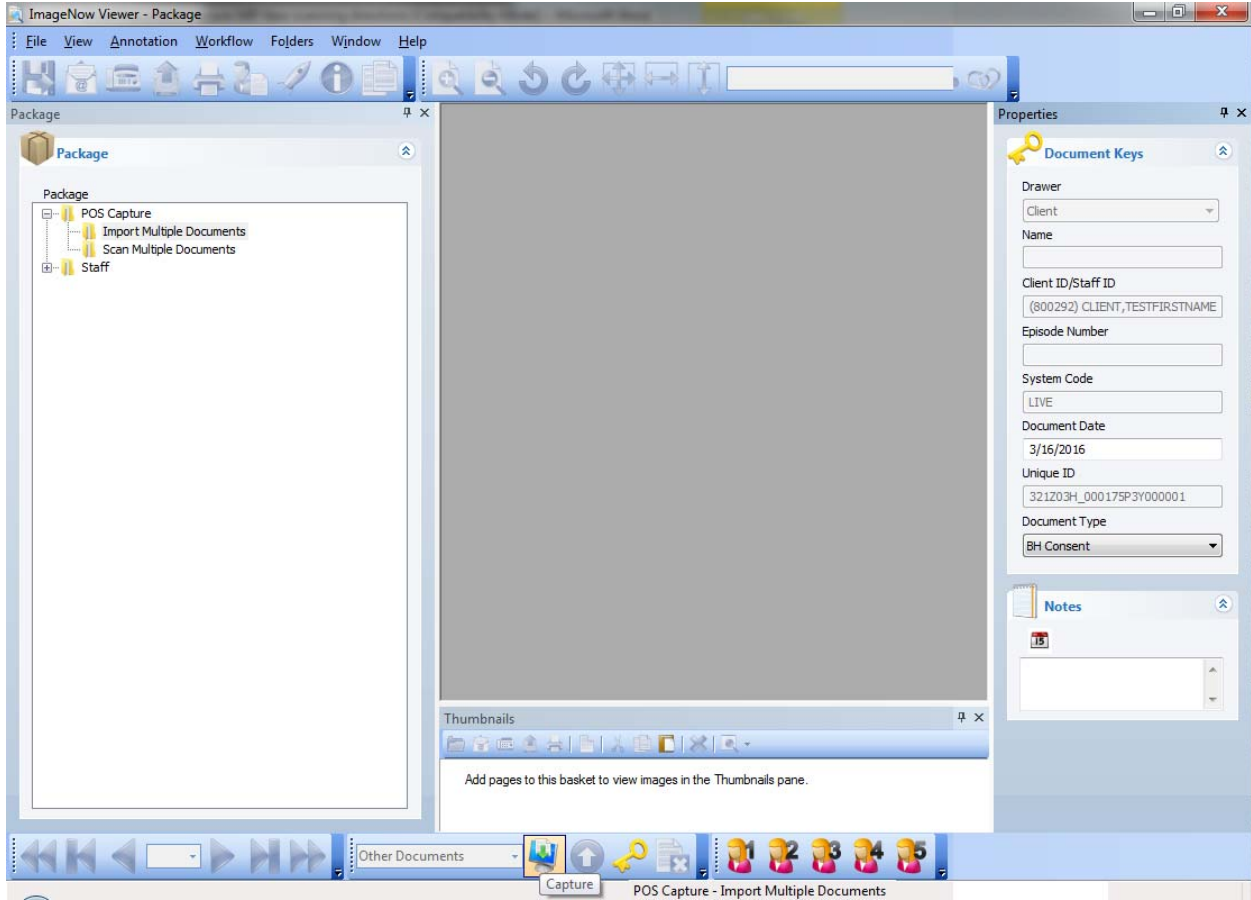
Client ID: CLIENT,TESTFIRSTNAME (800292)

Episode Number: [Blank]

Launch POS Capture

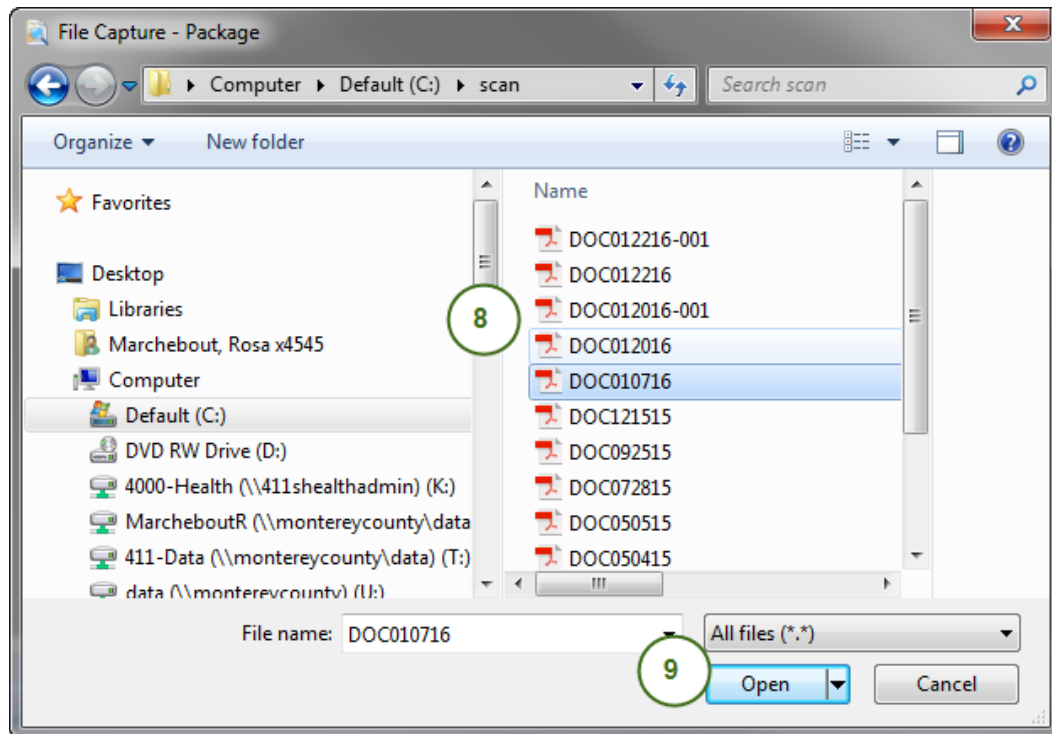
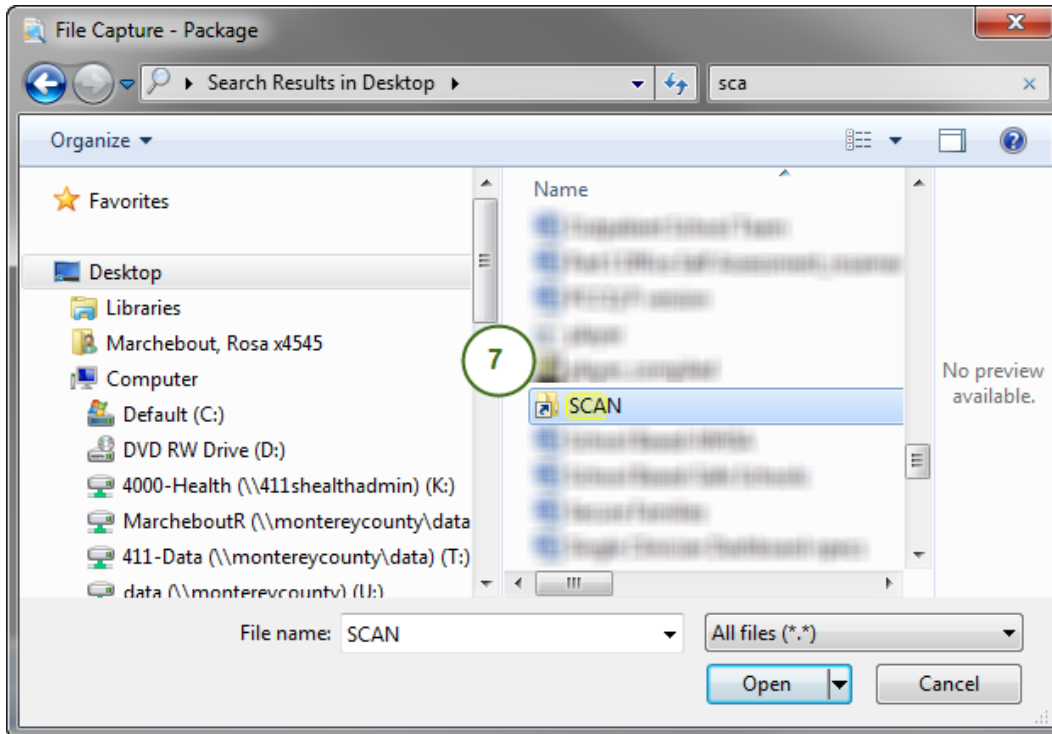
STEPS

5. Select "Import Multiple Documents"
6. Click on the Capture Icon located on the lower section of the window.



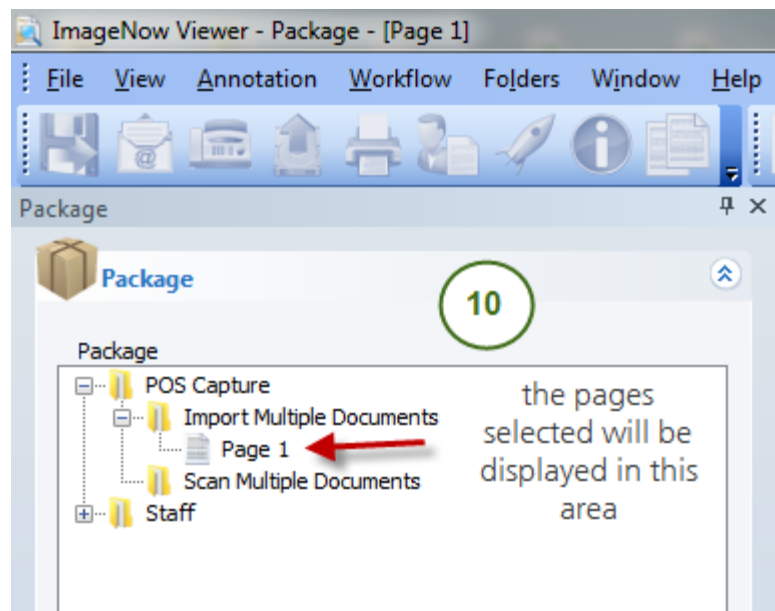
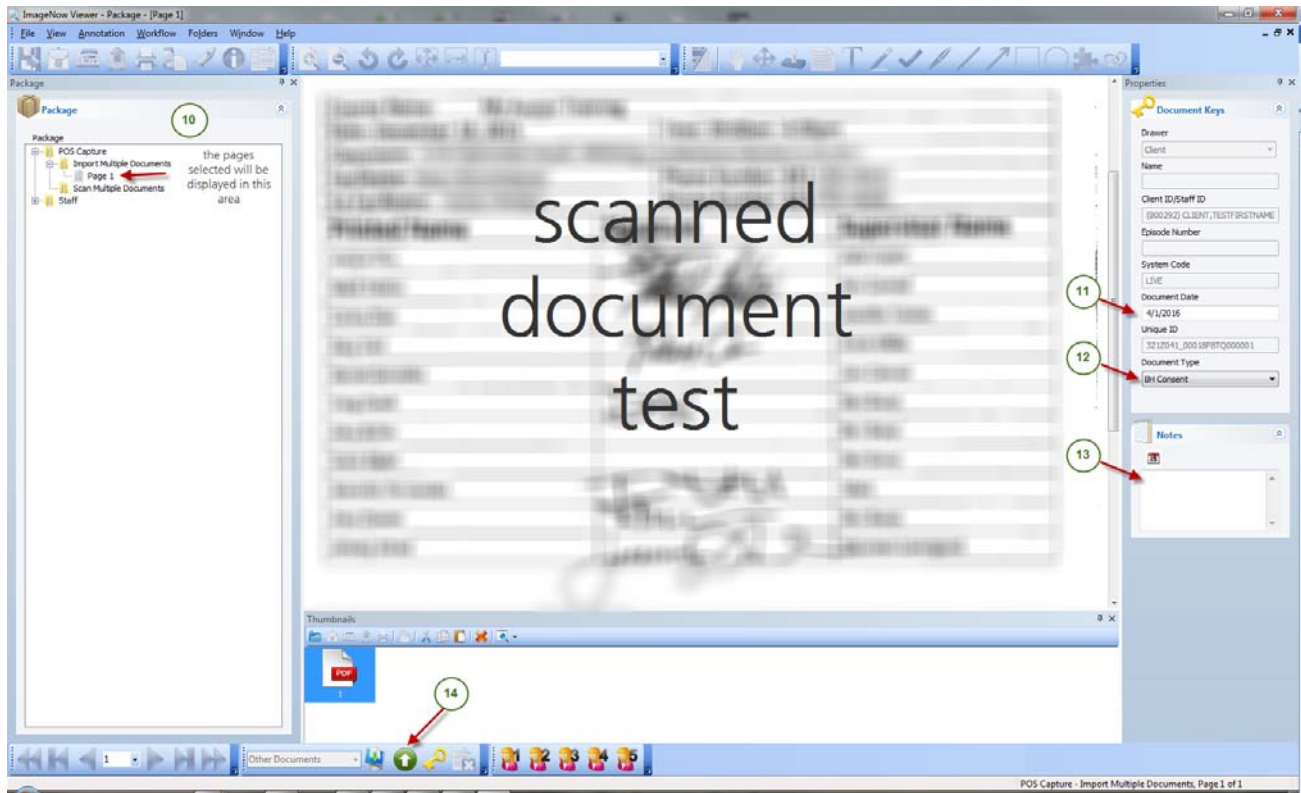
STEPS

7. Open your SCAN folder, or the location of where your scanned documents are stored.
8. Select the document or documents you are uploading for the selected client
9. Click on "Open"



STEPS

10. Verify upload
11. The "Document Date" is the date the document was scanned or imported in to the clients record. ALWAYS make sure the YEAR is a 4 digit number format.
12. Using the drop down menu for "Document Type", choose the category
13. Enter the description of the scanned document in the "Notes" section
14. Click on the Arrow to submit the document



Episode number

System Code
LIVE

Document Date
4/1/2016

Unique ID
321Z041_00018P8TQ000001

Document Type
BH Consent

Notes

15

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