

This guide will help you scan documents into the ICS.

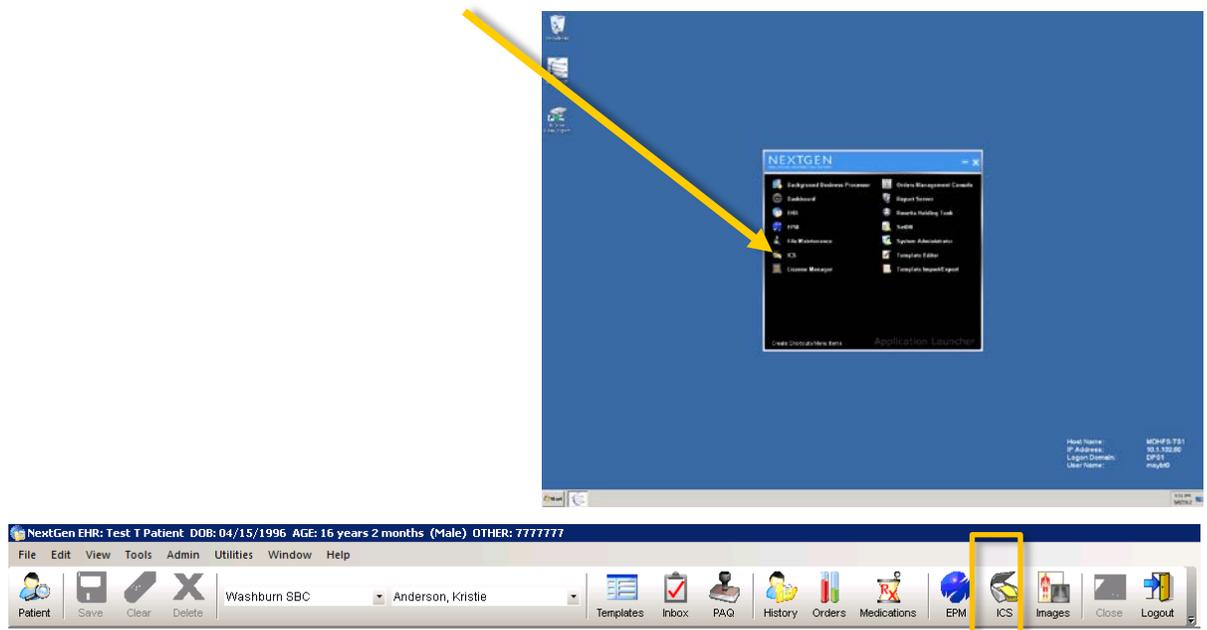
Note: Scanning into NextGen is only available via the scanner at the front desk – not the HP 400 scanner.

All documents with a signature on it plus the following documents should be scanned:

- Discovery/MIIC immunization records
- SDQ
- CASII
- MH Diagnostic Assessments
- MH Treatment Plans
- MH Action Lists

I. Opening ICS

A. Open the ICS from the application launcher or from the EHR toolbar

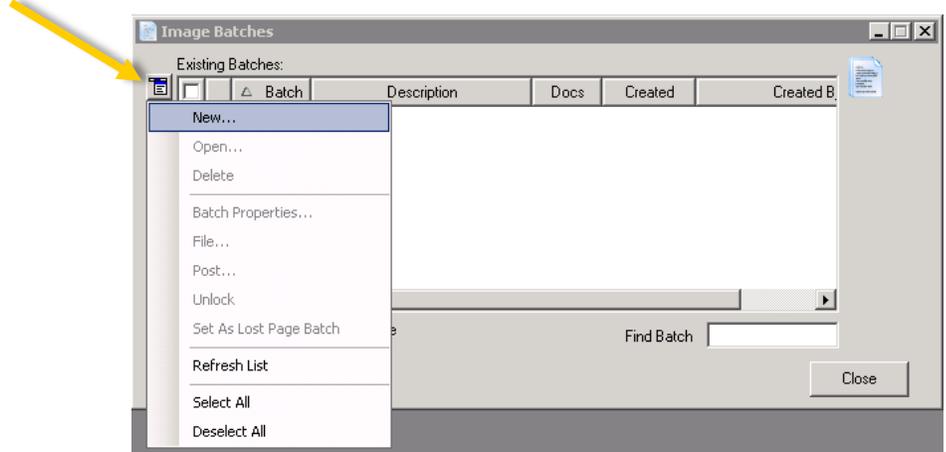


B. Scanning multiple documents

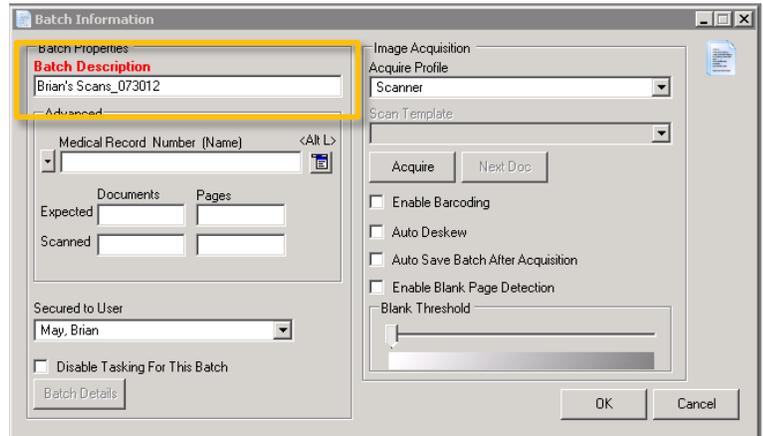
1. Click on the *Batches* button on the toolbar



- In the *Image Batches* window, click on the Norton button and select *New*.



- In *Batch Description*, type a name for the batch that you will recognize from the list of other batches.



C. Scanning a single document

- Click on the Scan & File button on the toolbar

II. Prepping the Scan

The follow process is used whether you are doing a batch or scan & file.

A. Medical Record Number

If the document(s) are for a specific patient, you can look hi/her up by clicking on the Norton button. If not, leave this field blank.

B. Secured to User

Secure the document(s) to yourself or another provider.
Example: Mary can secure a batch of Mental Health documents to Jennie so that only she can see them.

C. Acquire Profile

Select *Scanner* (the scanner at the front desk)

Hint: If you want to upload an existing file on your computer, select *File Import*.

D. Auto Deskew

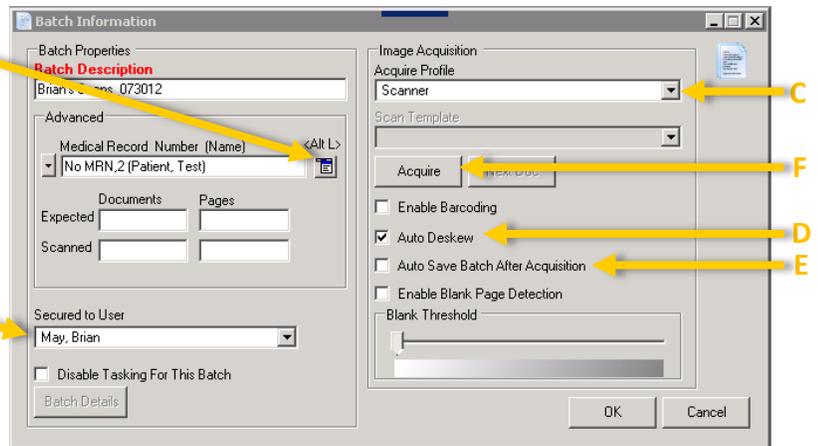
Check this box to ensure your document looks straight after it is scanned.

E. Auto Save Batch After Acquisition

Check this box only if you don't have time to link the document(s) to a patient's chart.
Example: You start scanning and several students walk in to check-in.

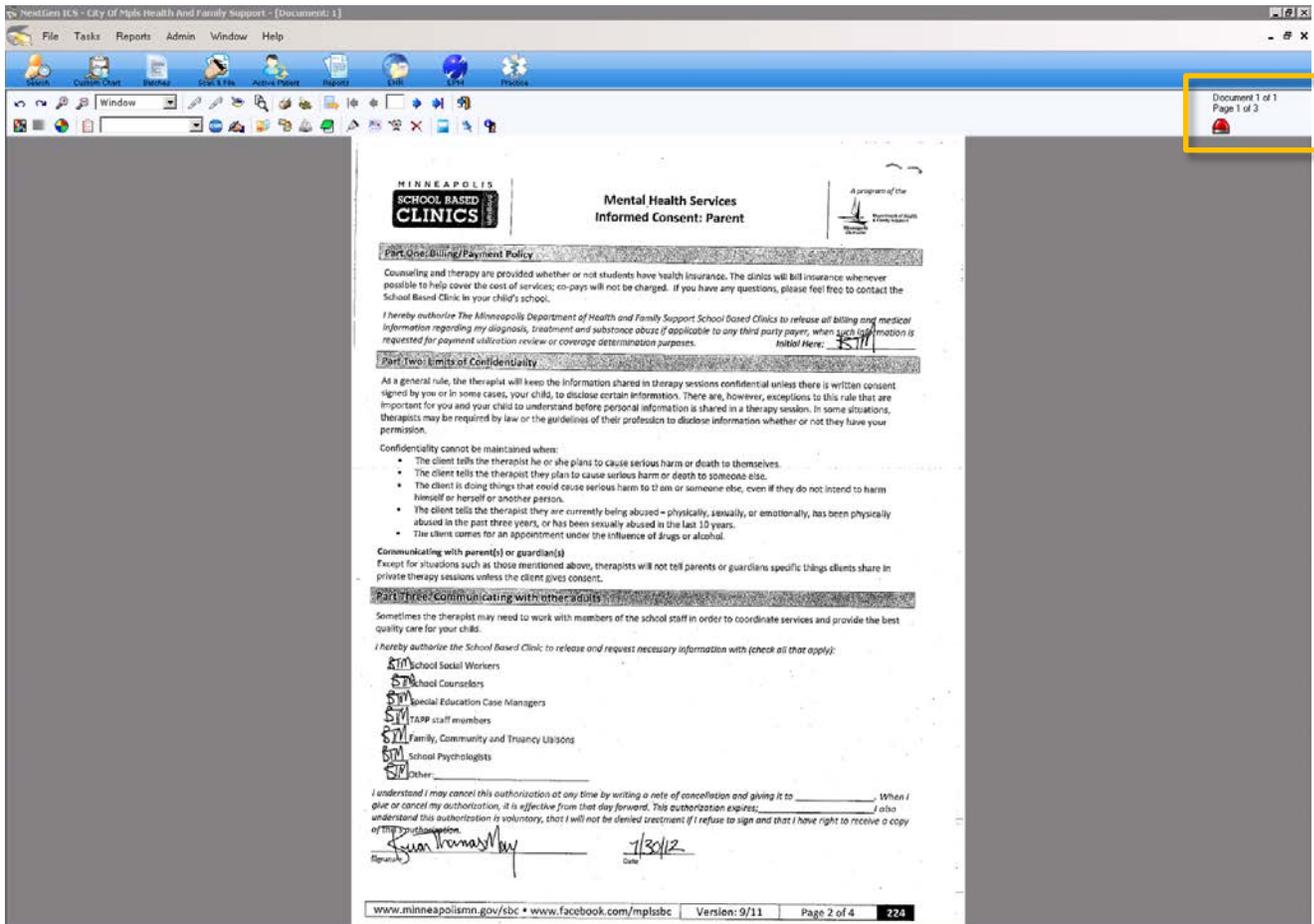
F. Click *Acquire*

Make sure the first page is loaded into the scanner and click the *Acquire* button. Your scanner should start scanning your document(s).

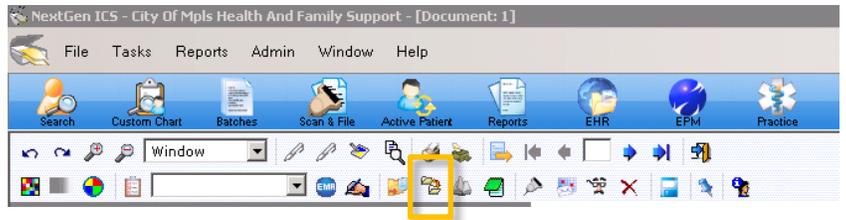


III. Filing Documents

Once you have finished scanning the batch, the first page of the batch appears in the ICS.



A. Click on the  button on the Document toolbar.

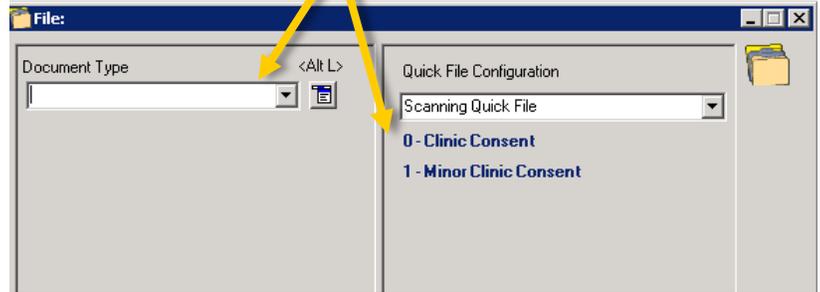


B. File Window: Page 1 of Batch or Scan & File Document

1. Document Type

Either select the proper document type of the first page of the batch from the *Document Type* field or select one of the Quick Files.

In this case it is a *MH Parent Consent* Form



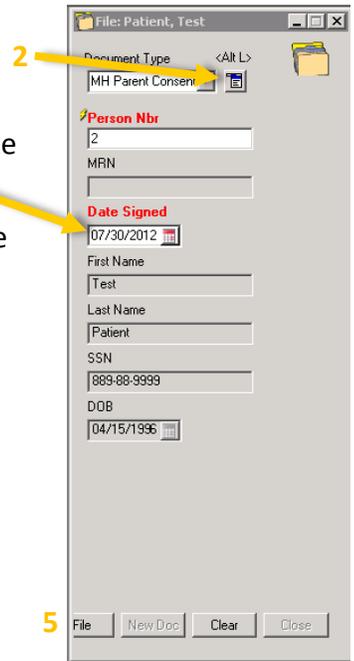
2. Norton Button

Lookup the patient this page should be filed under.

3. Date Field

Depending on the type of document, one of the following date fields will appear:

- a. **Date Scanned:** The date you scanned and are filing the document. These documents don't usually have a signature date in them.
- b. **Date of Service**
The date of the original appointment or encounter. (not the date it was scanned).
- c. **Date Signed**
The date document was signed (not the date it was scanned).
- d. **Test Date**
The date the original lab or test was performed (not the date it was scanned).



- 4. Some documents will have other fields to complete. The ones in red are the only fields required.
- 5. Double-check to make sure all information is correct. Then click on the *File* button.

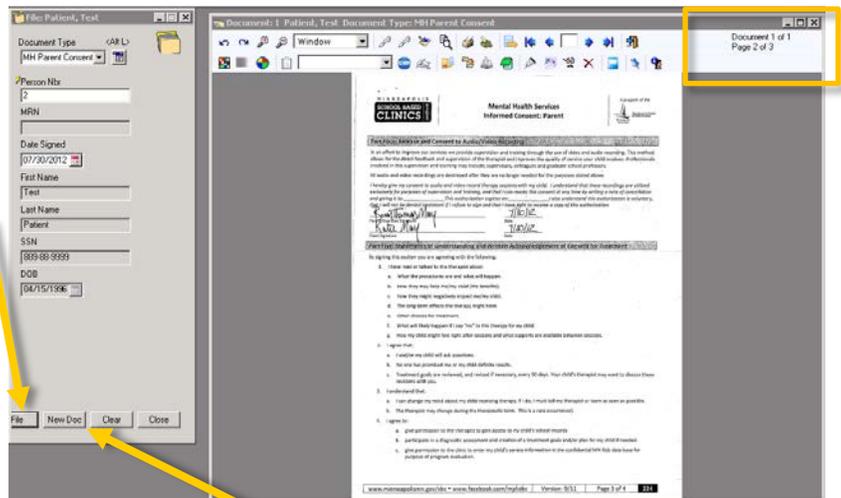
C. File Window: Page 2 of Batch

If you performed a Batch scan, you will now see the 2nd page of the batch appear.

1. If this page is part of the same document as the first page, then click on the *File* button and it will be paired up with the first page.

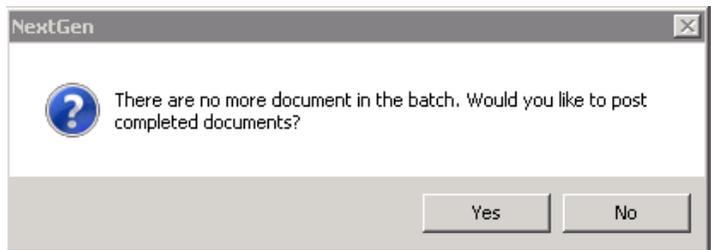
Repeat this step for all consecutive pages that should be filed together as one document.

2. If the next page is a part of a separate document as the previous page, click on the *New Doc* button and repeat step B.



D. Posting

When you have filed all of the pages in the batch, select *Yes* to post the documents to the patients' chart(s).

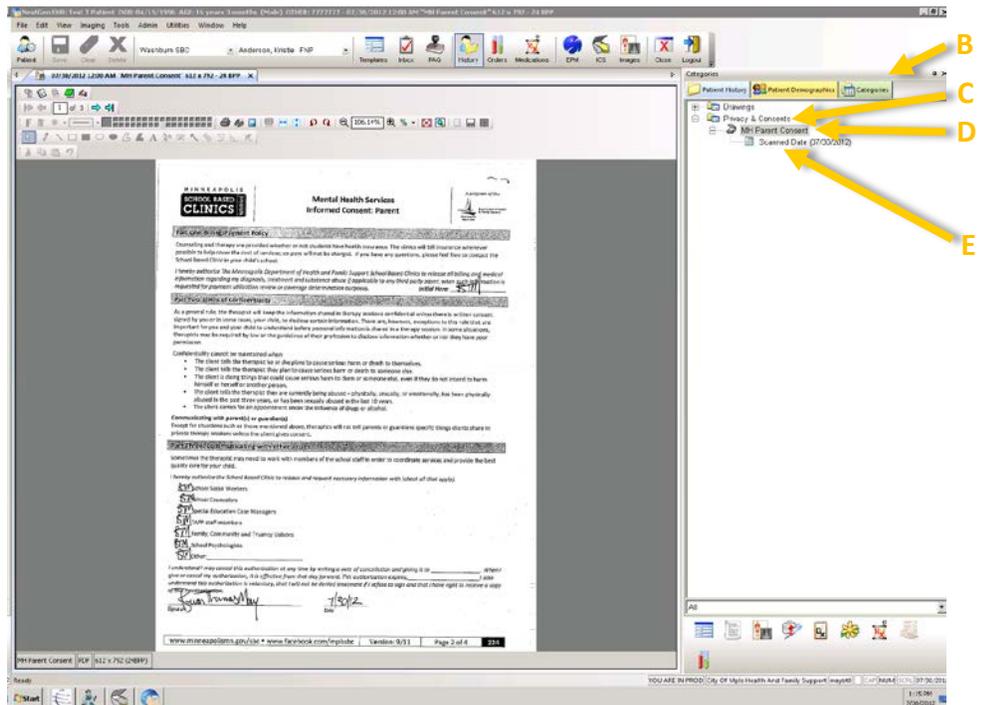


E. Tasking

Some document types will ask if you want to create a task to make sure a provider sees the document. See *EHR How-to Guide 6*.

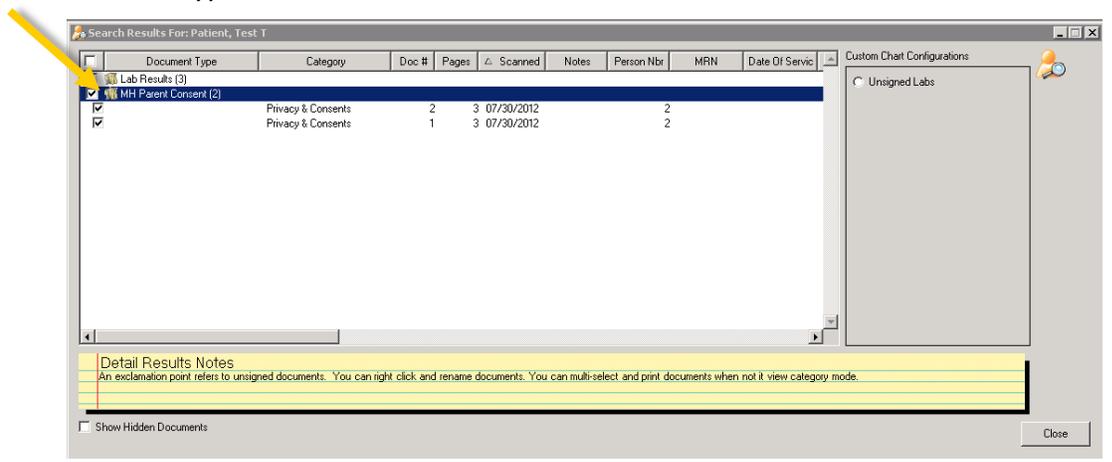
IV. Viewing Documents

- A. Open the patient's chart in EHR.
- B. Select the *Categories* tab in the *Patient History* window.
- C. Select the category the document would be under.
- D. Click on the document type.
- E. Select the document you wish to view.

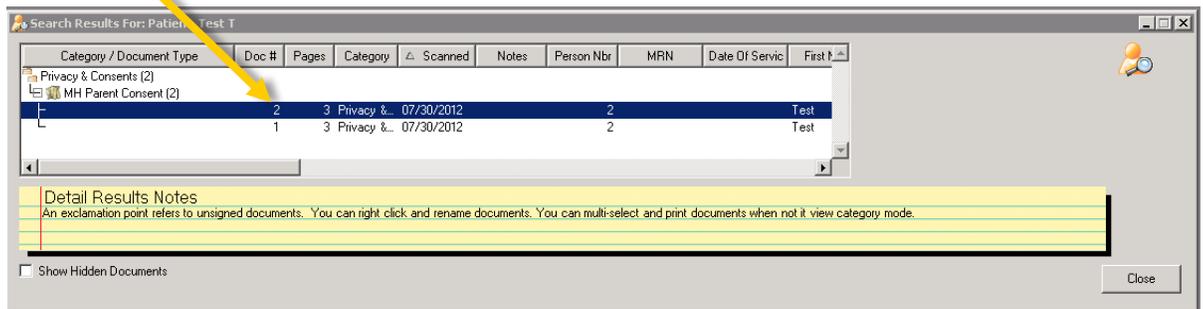


V. Document Filed to Wrong Person or Category

- A. Search for the patient in the ICS
- B. Click on the document's type.



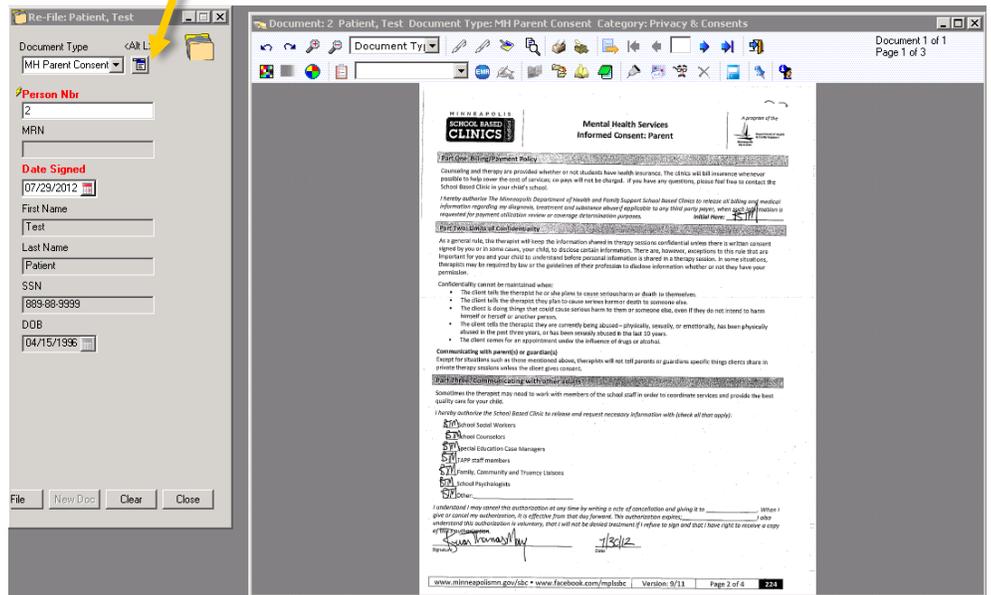
C. Double-click on the document that needs to be edited.



D. Click on the Re-file button on the Document Toolbar.



E. To change the chart the document is filed under, click on the Norton button and search for the correct patient.

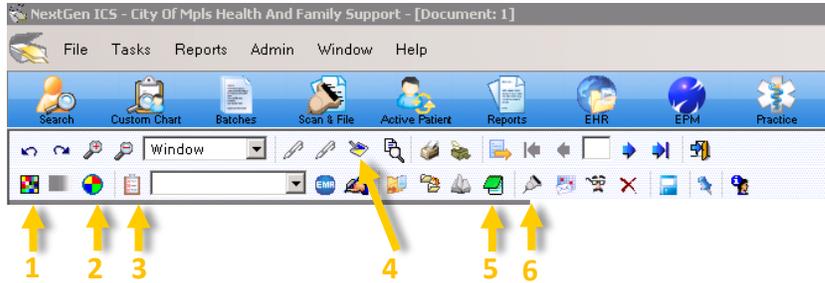


F. Click on the File button.

Advanced Training: Med Module Customization

This section is not required, but offers extra tips on how to use the ICS.

A. Document Toolbar Features



1. **Despeckle Page**
Use this to clean-up scanned and faxed pages.
2. **Contrast/Brightness**
Use this feature if the page looks too faded or too dark.
3. **Tasking**
Task this document for a provider to view.
4. **Annotate**
Opens the drawing toolbar to insert lines, boxes, circles, etc
5. **Notes**
Add notes that will be save with the document.
6. **Append Pages**
Add scanned pages to this document.

Congrats! You are now done with this How-to Guide.