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HealthMatics EMR

Input Manager

May 9, 2006

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1. Input Manager Overview

HealthMatics Input Manager is one of several HealthMatics EMR modules. With Input Manager, you can create scanned documents and transcriptions, and then manage them by tracking their status and identifying those that still need work. Input Manager also lets you reconcile imported provider accounts and provider locations to those already in HealthMatics EMR and reconcile imported patient results to caregivers or patients in HealthMatics EMR.

In the Input Manager module, you can do the following tasks:

- **Input Manager** - Scan documents and index (link) them to a patient encounter, diagnosis, or order in HealthMatics EMR. You can also transcribe documents dictated into hand-held devices (external transcriptions) and link them to caregivers and patient encounters, and transcribe voice notes (internal transcriptions) that are automatically inserted into the H&P Report for the appropriate patient visit.
- **Administration** - Create document types for your scanning projects, set scanning qualities and resolutions, and monitor transcription statistics.
- **Reconciler** - Match results received from external laboratories to caregivers and patients in HealthMatics EMR database. You can also view a log of activities associated with the Reconciler, as well as with other HealthMatics interfaces.
- **PM interface options** - Match providers and locations imported from your Ntierprise practice management system with caregivers and locations in the HealthMatics EMR database in the Provider and Location Import queues.

Documents in Input Manager

Input Manager functionality lets you create and edit scanned documents and transcription (both external and internal).

Scanned documents

You can create a scanned document that is one or more pages of information about a patient. A document can be a text document, image, photograph, or business card. See Scanned Documents on page 15.

Example: You could scan images taken by a dermatologist or physical therapist or scan lab reports, nursing home records, or hospital records and attach them to a patient's chart.

You can match scanned documents and transcriptions to a caregiver and patient encounter. With scanned documents, you can also match them to a patient's encounter, order (*plan*), or diagnosis. Matched scanned documents, referred to as *indexed* documents, appear in the *Documents* section of the caregiver's inbox in the **Clinical Module** of HealthMatics EMR.

You can submit scanned documents and transcriptions for caregiver review and approval, if needed, before they are attached to the patient's chart.

Inbound faxes are viewed and managed as scanned documents.

Transcription documents

Input Manager lets you transcribe information dictated by caregivers using hand-held recording devices (external transcriptions). You can also transcribe notes that caregivers enter directly in the HealthMatics EMR **Clinical Module** using the *Voice* tabs in *Note* and *Comment* fields (internal transcriptions). See Transcriptions on page 49.

Input Manager Administration Overview

Input Manager lets you set the types of documents you want to scan and their default scanning resolutions. For each document type, you can set the pixel type, resolution, paper size, brightness, and contrast. It is helpful to assign predefined settings for the different kinds of documents, for example, a photo should scan at a higher resolution setting than an insurance card. To keep file size down, it is best to use the lowest resolution possible that still provides a good quality image for that document type.

You can also view transcription statistics using the Administration section of Input Manager.

See Administration on page 57.

Reconciler Overview

You can match patient results with orders (or plans) created by specific caregivers and ordered for specific patients in HealthMatics EMR.

Use the reconciler to do the following:

- Download patient results from your external laboratory and send matched results directly to HealthMatics EMR patient records.
- Correct unmatched results listed in the *Reconciler* to caregivers and/or patients and then send them to the HealthMatics EMR patient records.

If all download results match caregiver and patient names in the HealthMatics EMR application, the *Caregiver Matching* and *Patient Matching* views will be empty. However, for any unmatched results, you must determine why they were not matched and then and match them manually.

Before downloading results for the first time, you can select criteria for matching patient records and assign account number IDs to ordering caregivers.

See Reconciler on page 61.

PM Interface Options

When you import providers or locations from your hospital information system, you might need to match them up with existing providers and locations in HealthMatics EMR to prevent duplicate information. Input Manager lets you reconcile imported providers and locations to information already in HealthMatics EMR.

See PM Interface Options on page 83.

Provider import queue overview

Most practices use a Practice Management System (PMS) to store demographic information about providers or caregivers. You can import this information into HealthMatics EMR through an interface between the two products. Some practice management systems allow multiple accounts for a single caregiver, but it is important that caregiver information not be duplicated in HealthMatics EMR.

Use the *Provider Import Queue* in Input Manager to review and approve new and modified caregiver information in the following situations:

- Before the first-time use of the HealthMatics EMR application and HealthMatics PMS Interface
- When you add a new caregiver to the PMS
- If you encounter problems importing caregiver schedules to the HealthMatics EMR Clinical Module
- Periodically to determine that here are no new caregivers in the queue
- When the PMS displays error messages that indicate queued caregiver information does not match (or map to) a HealthMatics EMR caregiver

Location import queue overview

If you have purchased the HealthMatics Ntierprise Practice Management System (PMS), the *Location Import Queue* provides the ability to decide what to do with the imported location. You can map it to a location already defined in HealthMatics EMR ***or*** designate it as a new EMR location. See PM Interface Options on page 83.

NOTE: This applies to all practice management systems.

Use the *Location Import Queue* to review and approve new and modified location information in the following situations:

- Before the first-time use of HealthMatics EMR and HealthMatics PMS Interface
- When you add a new location to the PMS
- When the PMS displays error messages that indicate queued location information does not match (or map to) a HealthMatics EMR location

Access to Input Manager

To help maintain the privacy, confidentiality, and security of patient and caregiver information, Input Manager requires that each caregiver has a unique user name and password to start the program. If your practice has more than one location, you must identify the location from which you are scanning.

Your practice administrator assigns caregivers initial user names and passwords and establishes access privileges based on job responsibilities.

When you log into Input Manager for the first time (or any HealthMatics application), the application prompts you to change your password. After you change your password, the new password is effective for all HealthMatics applications that you use. Passwords may be case sensitive, depending on options set in the Administration Module’s Site Settings.

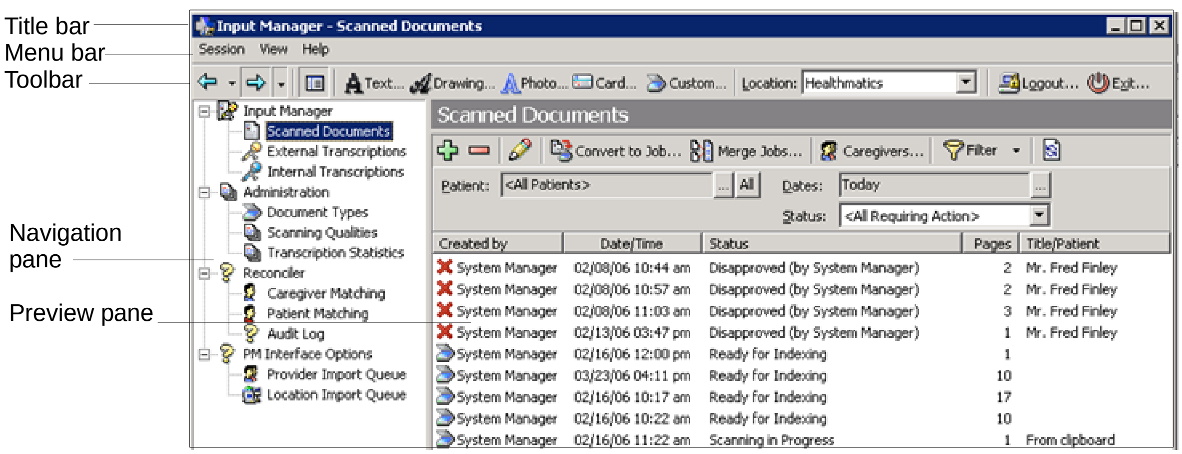
Follow these steps to log into Input Manager:

1. Do **one** of the following:
   - From the Windows® **Start** menu, select **Programs > HealthMatics > Input Manager** ***or***
   - From the HealthMatics **Clinical Module** menu bar, select **Launch > Input Manager** ***or***
   - From your desktop or scanning workstation, click Input Manager shortcut (if a shortcut displays on your desktop).
2. In the Login window, enter your *Login Name* and *Password* and click **OK** ***or*** press **Enter** on your keyboard.

Input Manager Window

Using Input Manager, you can view the status of scanned documents and transcriptions. The list of documents that appears in the window depends upon the filters you choose (*Patient, Dates*, and *Status*) and the document type you select (*Scanned Documents, Internal Transcriptions,* or *External Transcriptions*).

NOTE: Document types available in Input Manager depend upon the functionality purchased by your practice. Contact your practice administrator for information about the functionality available with Input Manager.



The Input Manager window includes the following elements:

- **Title bar** - Located at the top of the window, the title bar displays the name of the application (Input Manager) and the window, view, or dialog box that is active.
- **Menu bar** - Located directly below the title bar, the menu bar provides commands from drop-down menus.
- **Toolbar** - Located directly below the menu bar, the toolbar contains icons that serve as shortcuts for frequently used menu commands (see the table below). Also, locations appear here.
- **Status bar** - Located at the bottom of the window, the status bar displays the caregiver name, and current view.

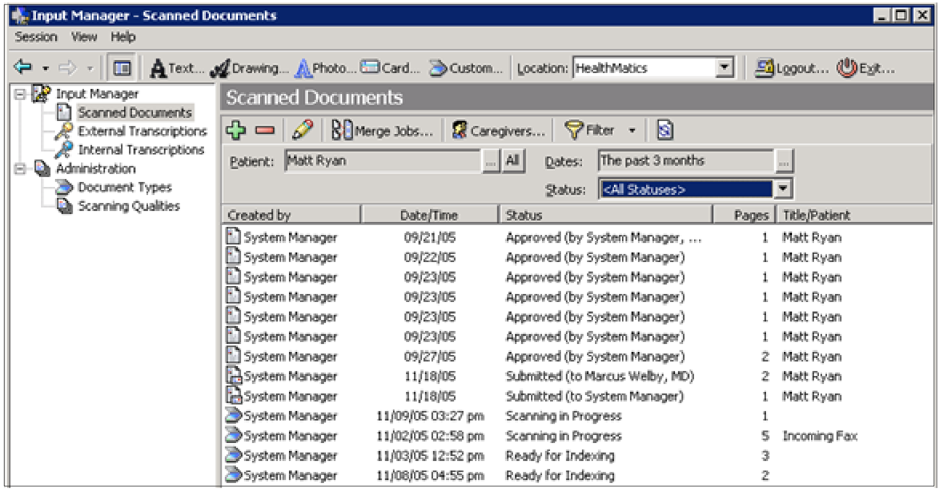
- **Navigation pane -** Located at the left side of the window, the navigation pane provides a tree view and administrative functions connected with Input Manager.
- **Preview pane -** Located at the right of the window, this pane includes a secondary toolbar with command icons and filter fields for *Patient, Dates*, and *Status* to help you locate documents.

Toolbar icons provide shortcuts to the following commands:

Icon	Name	Action
	Go Back	• Go back to the previous view. • Click the arrow to select a specific (previously accessed) view.
	Go Forward	• Go forward to a previous view. • Click the arrow to select a specific (previously accessed) view.
	Toggle Explorer Tree	Hide/show the navigation tree (left pane).
	Text	Scan immediately in low text quality.
	Drawing	Scan in medium drawing quality.
	Photo	Scan in high photo quality.
	Card	Scan business or insurance cards.
	Custom	Scan with custom settings.
	Location	Click the down-arrow to filter documents by location.
	Logout	Logout of Input Manager without closing it.
	Exit	Logout and exit Input Manager.

2. Input Manager Documents

All incoming documents (scanned, internal transcriptions, and external transcriptions) display in Input Manager.



With a selection made in the navigation pane on the left, a secondary toolbar contains shortcut icons for the following tasks:

Icon	Name	Action
	Add/New (**Insert**)	• **Scanned documents** - Open Scanned Document dialog to scan in a new document (see Scanning Documents on page 20). • **Transcriptions** - Open Transcription dialog to transcribe dictation (see Transcriptions on page 49).
	Delete Selected Item (**Delete**)	Delete (or archive) selected item.
	Edit Selected Item (**F2**)	Edit selected document.
	Dictated By (transcription)	Filter transcriptions by dictating caregiver.
	Filter by Caregivers (scanned documents)	Filter scanned documents by preferred caregiver.
	Filter	Select or create quick filter (see Scanned and Transcription Documents on page 10).
	Refresh List (**F5**)	Update list of documents in the view.
	Merge Jobs	**Scanned documents only** • Select a scanned item. • Press **Ctrl** and click a second item. • Click **Merge Jobs** to merge the two selected jobs into one.

Document Search

To search for documents that have been scanned into Input Manager, or have been transcribed or are awaiting transcription in Input Manager, follow the steps below:

1. Log into Input Manager and, in the left pane, select the document type that you want to locate (**Scanned Documents, External Transcriptions** or **Internal Transcriptions**).
2. To locate a specific document, click 

and select a quick filter (refer to the ***Application Reference*** manual for instructions on setting these up) ***or*** use any of the following filters to set search criteria:

Filter Name	Action
Caregivers **(Scanned Documents)**	Filter scanned documents by associated caregiver.
Dictated by **(Transcriptions)**	Filter transcriptions by the caregiver who dictated them.
Patient	Filter documents for a specific patient.
Dates	Filter documents within a specific date range.

Filter Name	Action
Status (**Scanned**)	Filter scanned documents to see those with a specific status: • **All requiring action** - Show only those documents that require action, such as those that are ready to be indexed. • **All statuses** - Show all documents in Input Manager for the date range and/or patient selected. • **Ready for indexing** - Show all documents that are not yet associated with a patient name in HealthMatics EMR. • **Scanning in progress** - Show all documents in the scanning process. • **Document submitted** - Show all documents submitted to reviewing caregivers. Once submitted, they cannot be revised unless the caregiver rejects them. • **Document rejected** - Show all documents submitted to and rejected by reviewing caregivers for revision. • **Document approved** - Show all documents submitted to and approved by reviewing caregivers. These documents become a permanent part of the patient record. • **Others** - Show all documents not included in one of the other categories.
Status (**Transcriptions**)	Filter transcriptions to see those with a specific status: • **All requiring action** - Show only those transcriptions that require action, such as those ready to be indexed. • **All statuses** - Show all transcriptions in Input Manager for the date range and/or patient selected. • **In progress** - Show transcriptions in Input Manager not yet submitted for review or saved to a patient chart. • **Submitted** - Show transcriptions submitted for review but not yet rejected or approved. • **Rejected** - Show transcriptions submitted for review and rejected. • **Approved** - Show transcriptions submitted for review and approved (saved to a patient chart). • **Others** - Show all documents not included in one of the other categories.

3. If needed, click (Refresh) to pull any changes made recently into the view.
4. Select a document and press **F2** on your keyboard or click (Edit Item) to view it and take action (see Editing Scanned Images on page 27 and Reviewing and submitting transcriptions for approval on page 52).

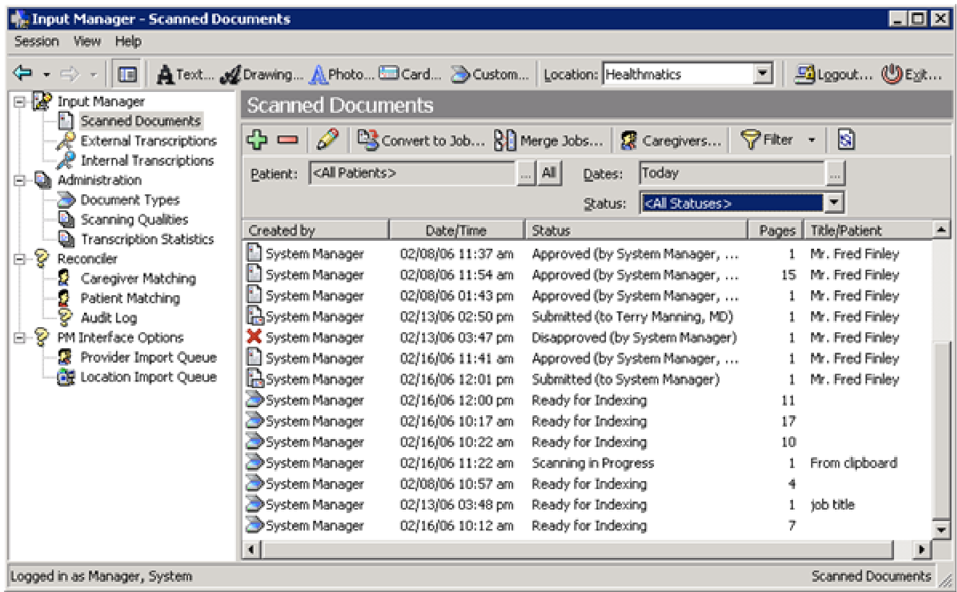
Scanned and Transcription Documents

Although the graphics reflect scanned documents, the method for viewing transcription documents is similar.

1. From Input Manager's left pane, select one of the options under Input Manager (**Scanned Documents, External Transcriptions**, or **Internal Transcriptions**).

2. Use the filters to locate the document(s) you want to view (see Document Search on page 8).

3. View information in the list of documents.



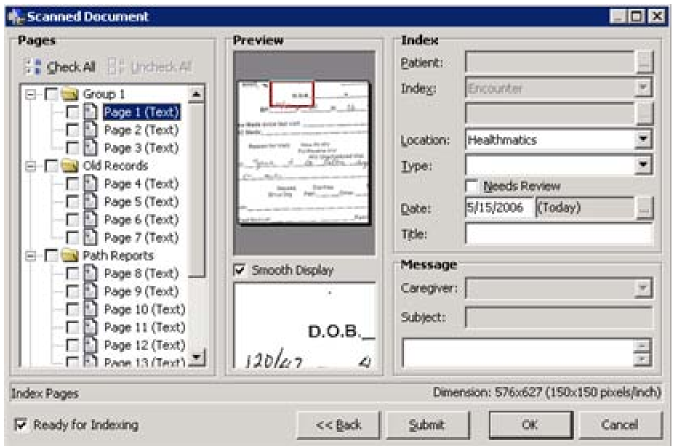
NOTE: If someone else is editing the document, *Locked* appears as the status. To see who is editing the document, double-click on it.

4. To open the document, do **one** of the following:

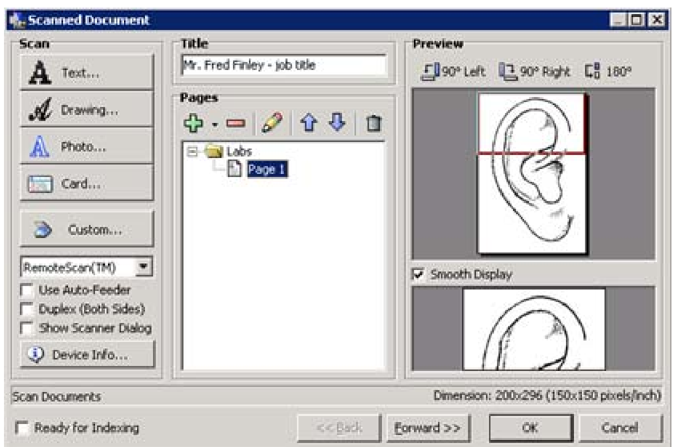
   - Press **F2** on your keyboard ***or***
   - Double-click it ***or***
   - Select it and click (Edit Item) ***or***
   - Right-click it and select **Edit**.

Viewing scanned document screens

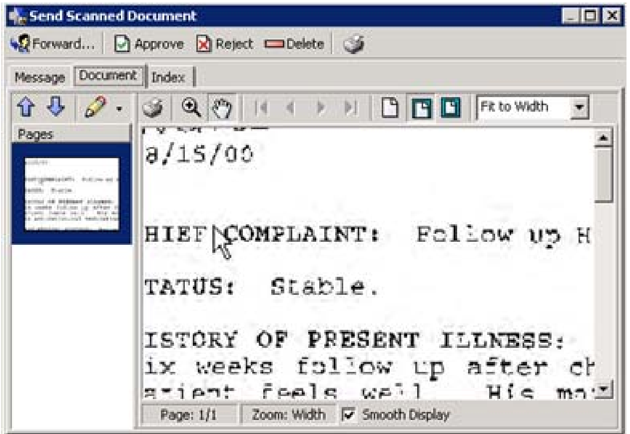
- **Ready for indexing** - If you open a document with the *Status, Ready for Indexing*, the Scanned Document dialog box appears, where you can preview the document and index it to a patient. Continue with Editing Scanned Images on page 27.



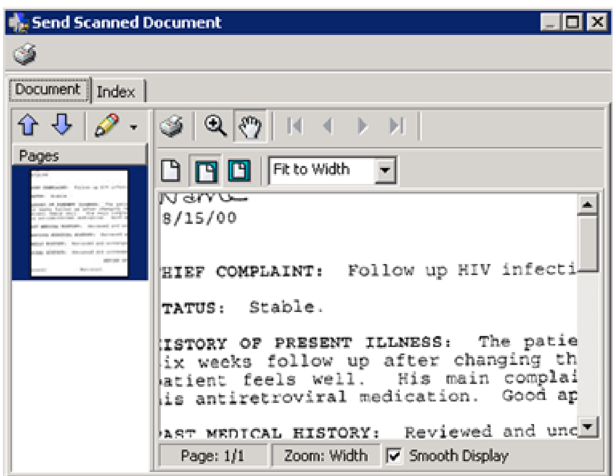
- **Scanning in progress** - If you open a document with a Status of Scanning in Progress, the Scanned Document dialog box appears, where you can continue scanning in pages and groups before indexing the job.



- **Submitted/rejected** - If you open a document with a *Status* of *Submitted,* or *Rejected*, the Send Scanned Document dialog box appears, where you can view a message from the caregiver (if any) view the document, or edit indexing information.

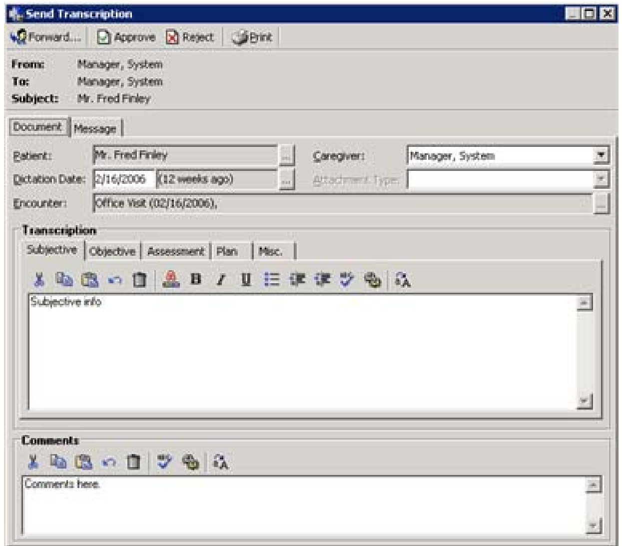


- **Approved** - If you open a document with a *Status* of *Approved* (saved to the chart), the Send Scanned Document dialog box appears (without the *Message* tab). You can view or print the document, view the indexing information, and rotate the image if necessary.



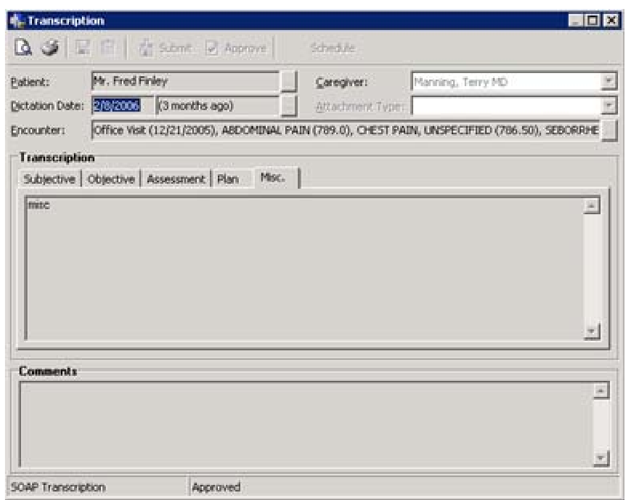
Viewing external transcription screens

- **Submitted, rejected** - If you open an external transcription document with the *Status* of Submitted or Rejected (and *Needs Review* was checked), the Send Transcription dialog box appears with both *Document* and *Message* tabs.



You can view the document and any message that the transcriber and/or caregiver inserted, edit, forward, approve, reject, or print the document.

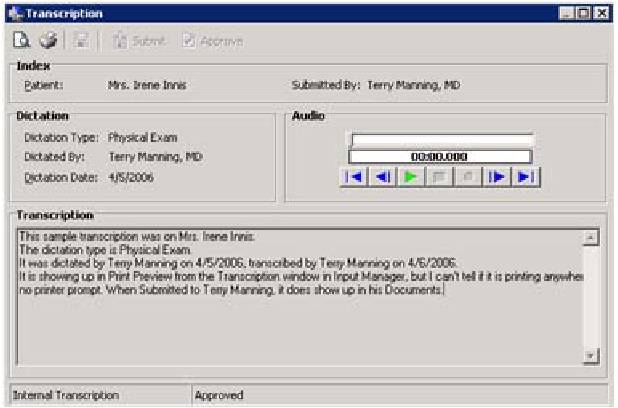
- **Approved** - If you open a document with a *Status* of *Approved*, the Transcription dialog box appears grayed out.



You can just view, but not change the document.

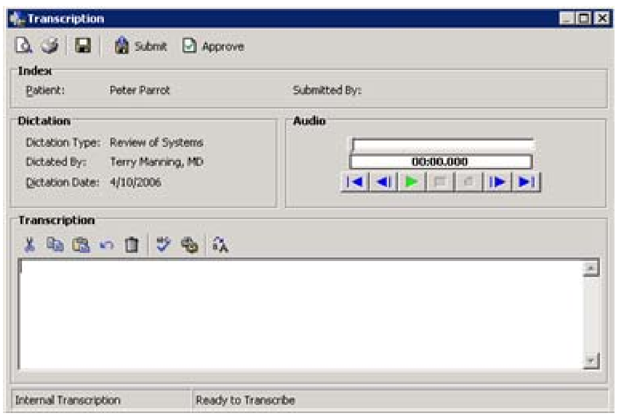
Viewing internal transcription screens

- **Approved** - If you open an internal transcription document with a Status of Approved, the Transcription dialog box appears grayed out.



  You can view, preview, and print the transcription, and listen to the original dictation.

- **All other statuses -** The Transcription dialog box is enabled.



  You can enter dictation, preview, print or save the transcription. You can also submit it to the caregiver for approval or approve it and save it directly to the H&P Report for the encounter.

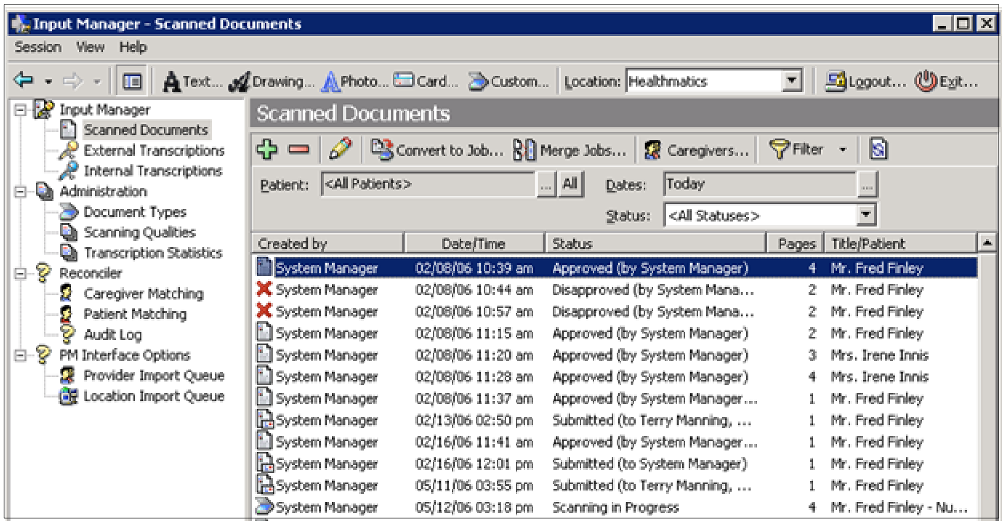
  NOTE: If the transcription has already been submitted for caregiver approval, the Submit button is disabled.

3. Scanned Documents

NOTE: Scanned documents are not intended to be used as diagnostic tools or to provide medical diagnoses.

Scanned Documents Overview

In Input Manager, you can scan documents, files, and images into HealthMatics EMR, update them, and link them to patient charts and encounters.



The list of Scanned Documents that displays in Input Manager can originate from two sources:

- Documents that are scanned into Input Manager.
- Files that are imported from a directory into Input Manager.

About the scanning process

To scan a document, photograph, business card, or image into HealthMatics EMR and attach it to a patient's chart, you will complete these general steps:

- Scan a document to create an electronic image in Input Manager.
- Index (match) the image to a patient (and possibly an encounter, diagnosis, or plan).
- Submit the scanned image to a caregiver for review and approval ***or*** (if it does not need review) save it directly to a patient's electronic record.

In addition, scanned documents can be annotated, rejected, edited and resubmitted, or deleted.

About scanned document statuses

Scanned documents can have any of the following statuses:

- **Scanning in progress** - The document has not been completely scanned or is not ready for indexing.
- **Ready for indexing** - The document has been scanned and is ready to be matched to a patient’s encounter, diagnosis, or lab order in HealthMatics EMR.
- **Locked** - Someone else is indexing the document and it is not available for you to edit.
- **Document submitted** - The document has been scanned, indexed, and submitted to a reviewing caregiver for approval. The Needs Review option was selected in Input Manager.
- **Document rejected (disapproved)** - The document was rejected by the caregiver. It might be the wrong image or not the latest result that the caregiver wants to use.
- **Document approved** - The document has been approved by the caregiver and saved to patient chart.

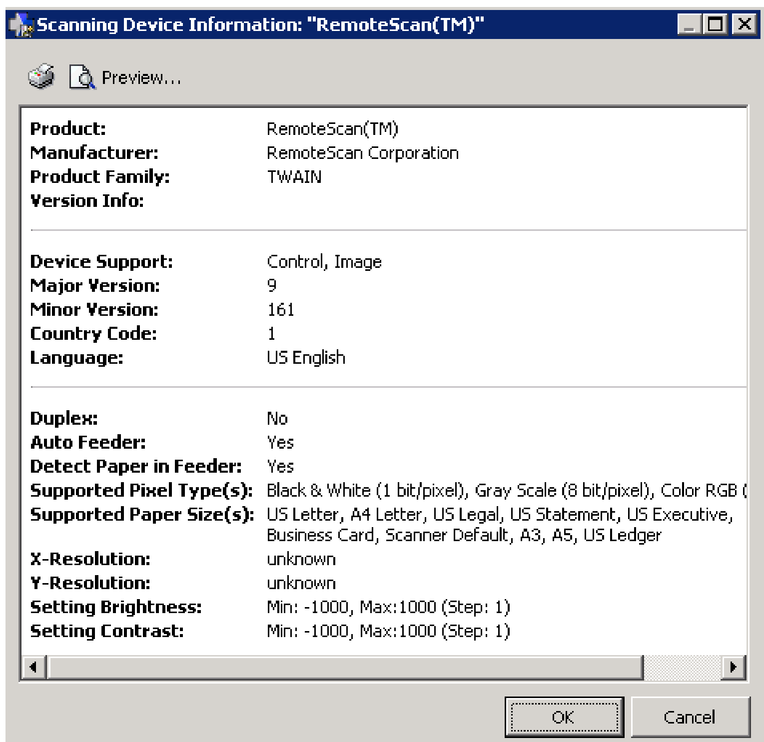
Scanner Settings

Before you scan a document, you can review scanner settings to ensure that the scanner is set up correctly. If you have multiple scanners installed, you can also select a scanner and review settings for your scanner.

Viewing scanner information

View scanner information to learn how your scanner is set up and what devices, types, and paper sizes it supports.

1. From the left pane of Input Manager, select **Scanned Documents**.
2. Press **Insert** on your keyboard ***or*** click (Add a Scanned Document) on the secondary toolbar.
3. At the bottom of the left pane, click **Device Info**.



4. Click **OK** to return to Scanned Document.

Selecting scanners

If you have more than one scanner at your practice location, select the scanner that you want to use.

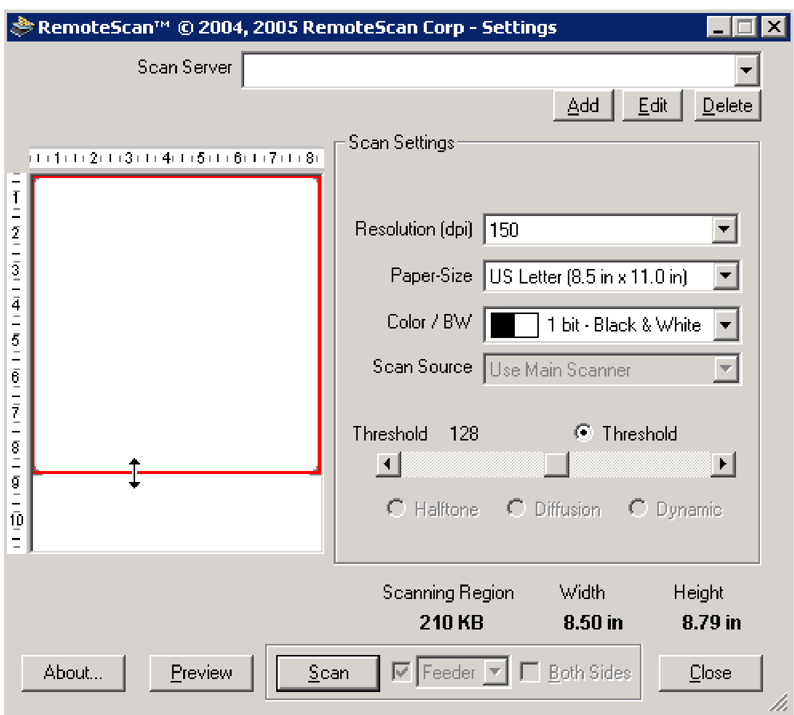
NOTE: This method can be used **only** if your workstation is connected to a scanner.

1. From the left pane of Input Manager, select **Scanned Documents** and click to access Scanned Document.
2. Underneath the scan buttons (*Text, Drawing*, etc.) select **one** of the following:
   - **Auto-feeder** to scan multiple pages from a scanner with a feeder.
   - **Duplex** to scan two-sided pages.
   - **Show scanner dialog** to select individual settings (see Setting scanner options on page 18).
3. To scan, click the appropriate *Scan* button (**Text, Drawing, Photo, Card**, or **Custom**).

Setting scanner options

You can set up the scanner so that only a portion of a page will always be scanned. This might be helpful if you scan the same types of documents and want to scan only the top portion of them. You can also set scanner resolution.

1. From the left pane of Input Manager, select **Scanned Documents** and click to access Scanned Document.
2. Underneath the scan buttons (*Text, Drawing*, etc.) select **Show Scanner Dialog**.
3. Click one of the **Scan** buttons (**Example:** *Text* or *Drawing*) to display the <scanner> - Settings dialog box.



4. To change the area of the scan, click in the thumbnail image or adjust the red box, if one is showing, to reflect the area on the page that you want to scan.
5. Adjust *Resolution, Brightness, Paper-Size*, and other settings unique to each scanner, as necessary.
6. **(Optional)** To preview the scanned document, insert pages into the scanner and click **Preview.**
7. Click **Scan** to start the scanner.

Scanning Documents

In Input Manager you can quickly scan documents using the primary toolbar ***or*** you can scan from the Scanned Documents dialog box.

Scanning documents using the primary toolbar

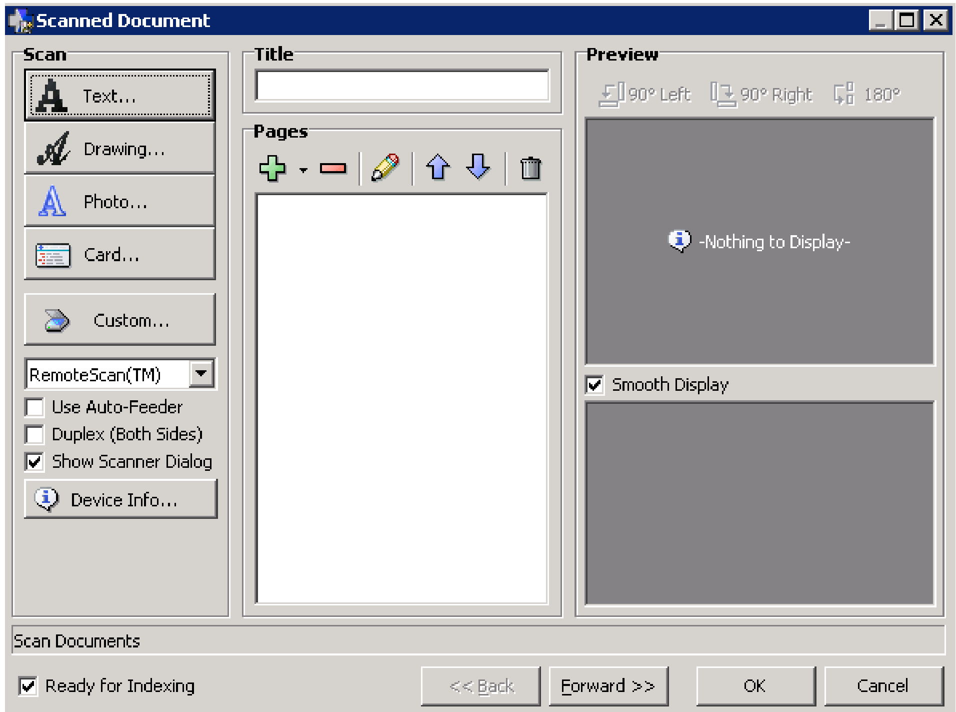
1. From the Input Manager toolbar, click the type of document you will be scanning. This document type sets the resolution or quality of the scan.

Icon	Name	Action
	Text	Scan in low text quality. Scanned pages are added to the selected group. If there is no group, a *Group 1* is created.
	Drawing	Scan in medium drawing quality. Scanned pages are added to the selected *Group*.
	Photo	Scan in high photo quality. Scanned pages are added to the selected *Group*.
	Card	Scan business or insurance cards. Scanned pages are added to the selected *Group*.
	Custom	Open the Quality Settings dialog and set custom settings for the scanner. You might want to do this if none of the other scanner settings (Text, Drawing, Photo, or Card) match what you want to scan.

2. Follow the steps in Scanning documents from the dialog box on page 21, Step 3.

Scanning documents from the dialog box

1. From the left pane in Input Manager, select **Scanned Documents**.
2. Press **Insert** on your keyboard ***or*** click (Add a Scanned Document).



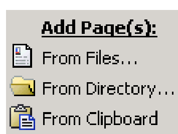
3. In the *Title* text box, enter a name for the scanning job (which may contain multiple scanned documents). This name helps you identify the job, but does not display on the scanned documents.
4. To add a group, which acts as a folder that will store your scanned pages, click (Add Items), select **Add Group,** and do one of the following:
   - To add an existing group type, select the group from the Add Group(s) list. For example, to store the pages you will scan inside a Pathology Reports group, select **Pathology Reports**.
   - To add a custom group, select **Custom** (see Scanning page groupings on page 23).
5. To store the page you will scan in a group, select the **Group** folder in which you want to add a page.
6. In the *Scan* pane on the left, click the down-arrow to select the scanner (if there is more than one).
7. **(Optional)** To see the settings that your scanner supports, in the *Scan* pane on the left, click **Device Info**.

   IMPORTANT! Input Manager allows you to set settings that might not be supported by your scanner. Click this box to view the settings that your scanner supports (see Viewing scanner information on page 17).

8. **(Optional)** In the *Scan* pane on the left, select any of the following:

Name	Action
Use Auto-Feeder	• Use the automatic feeder for scanning (if your scanner has one). • Defaults to the most recently used setting. **NOTE:** If there is no paper in the autofeeder, it scans on the flat bed automatically.
Duplex (both sides)	• Scan both sides of a document. • Defaults to most recently used setting.
Show Scanner Dialog	Set scanner properties just before you scan a document. The Scanner Dialog appears after you select the type of scan that you want (Text, Drawing, Photo, Card, or Custom) (see Setting scanner options on page 18).

9. Place the pages you are going to scan in the scanner.
10. In the *Scan* pane on the left, click one of the **Scan** buttons (see Scanning documents using the primary toolbar on page 20) to start scanning.
11. In the *Pages* box, use the icons to do the following. At this point, typically select **Text**, **Drawing**, **Photo**, **Card**, or **Custom**, rather than the options below.,

Icon	Name	Action
	Add Page(s) 	• **From file** - Import documents from a file and scan them (see Importing Files for Scanning on page 41). • **From directory** - Import documents from a folder and scan them (see Importing Files for Scanning on page 41). • **From clipboard** - Add a graphics bitmap from the clipboard to the selected group (see Importing images from clipboards on page 43).
	Add Group(s) 	• **Custom** - Create a group into which your scanned documents will appear (see Scanning page groupings on page 23). • <Group name> - Select a group into which your scanned documents will appear. These group names appear here after you create one using the Custom option (see Scanning page groupings on page 23).
	Delete	Delete the selected group or page (see To delete pages or groups on page 25).
	Edit	Edit the selected group or page name. See Editing page names on page 27.
	Move Up	Move the selected group or page up (see Scanning page groupings on page 23).

Icon	Name	Action
	Move Down	Move the selected group or page down (see Scanning page groupings on page 23).
	Clear	Clear all the groups and pages (see To delete pages or groups on page 25).

12. If the document that you scanned is ready to be matched to a patient, check **Ready for Indexing**. This will apply the Ready for Indexing status to the documents. If the document is not ready, do not check this. The document will receive the In Progress status.

13. To view the page, click on the page name.

    A small view of the entire page appears in the top right pane. A red box highlights the area that displays in a close-up in the bottom right pane.

14. To view a different part of the image, click on that section in the upper right pane. The red rectangle in the upper right pane indicates the section where you clicked and the section you clicked appears in a close-up in the bottom right pane.

15. Continue with one of the following:

    - Setting scanner options on page 18
    - Scanning page groupings on page 23
    - Editing Scanned Images on page 27

Scanning page groupings

You might want to place your scanned documents in a group to manage them more efficiently. Each group can include multiple pages of the same document.

You can place your scanned pages in a group that already exists or create a custom group, for example, Pathology Reports, Nursing Home Records, or Lab Results from a specific lab.

Examples:

- **One group** - If a lab report consists of two pages, you might want to treat this report as one group of documents.
- **Multiple groups**
  > If you are going to scan a lab report, referral letters, and prescription notes, you might want to place them in separate groups.

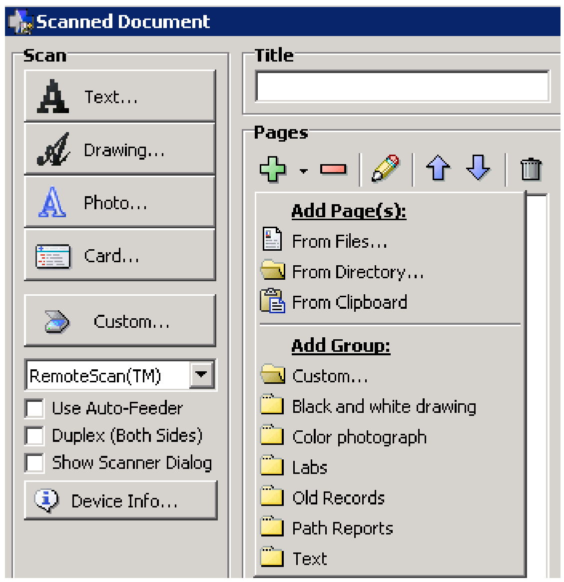
  > You might scan physical therapy notes or results from a specific lab that correspond to different patients. You can place all of these in the same group called “Physical Therapy” or “Lab Results” and then attach specific documents to specific patients.

To place pages in groups

You can select a group before you scan a document and place that scanned image in the group. You cannot move a scanned document into a group after it has been scanned.

Within a group, you can move a page up or down. However, you cannot move a page to a different group.

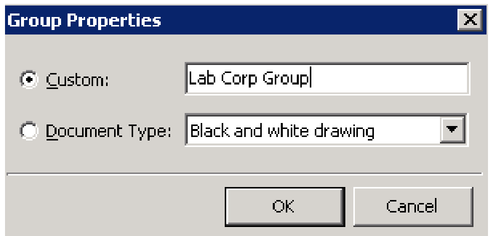
1. In the left pane of Input Manager, select **Scanned Documents**.
2. On the secondary toolbar, click (Add a Scanned Document), and to display a drop-down menu.



3. Under **Add Group**, do one of the following
   - To add a custom group, select **Custom** (see To create custom groups on page 25).
   - To add an existing group type, select the group from the Add Group list. For example, to store the pages you will scan inside a Pathology Reports group, select **Pathology Reports**.
4. To move a page up or down inside a group, click the page and click the (Move Up) or (Move Down) arrow. Alternatively, right-click and select the **Move Up** or **Move Down** option.

To create custom groups

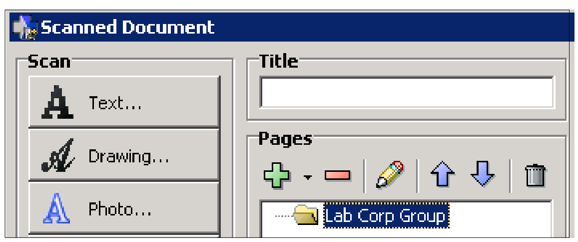
1. In the left pane of Input Manager, select **Scanned Documents**.
2. On the secondary toolbar, click (Add a Scanned Document), and to display a drop-down menu.
3. Under *Add Group* select **Custom**.



4. Click the **Custom** radio button, enter the name of the group into which you will put pages and click **OK**.

   NOTE: If you select Document Type, a predefined group appears in the list of pages rather than a custom group.

The new folder displays in Scanned Document.

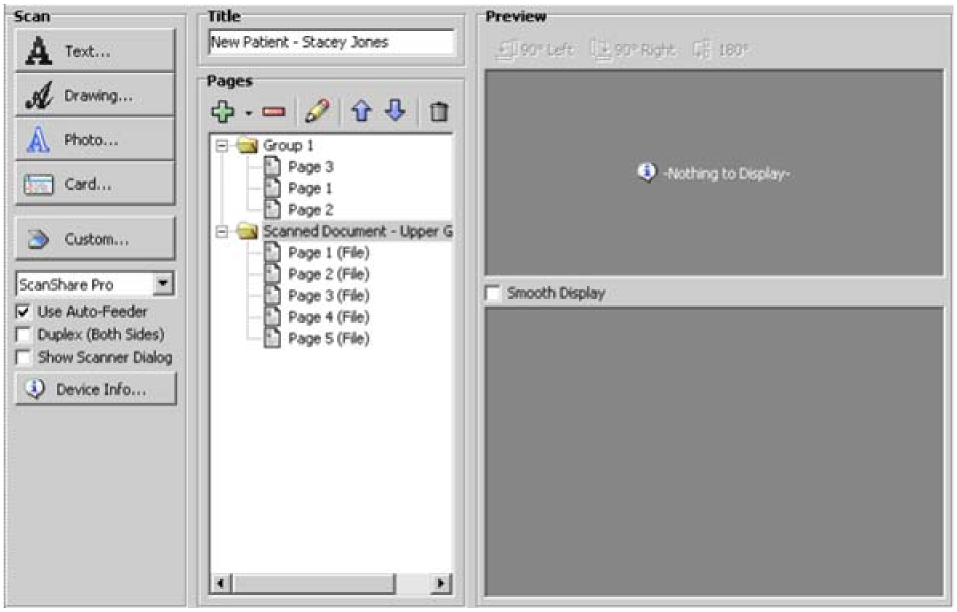


To delete pages or groups

Images imported or scanned into a document can be deleted before the document is approved and becomes part of the patient record. For example, if the wrong image is accidentally imported into a document, you should delete it.

To delete one page or group

1. From the Scanned Document dialog box, select a page or group.



2. Click (Delete item). Alternatively, right-click and select (Delete item).
3. In the confirmation message, click **Yes** to continue deleting.

To clear all pages

This option clears all pages in the Scanned Document list.

1. Click (Clear all items). Alternatively, right-click and select (Clear).
2. In the confirmation message, click **Yes** to continue deleting.

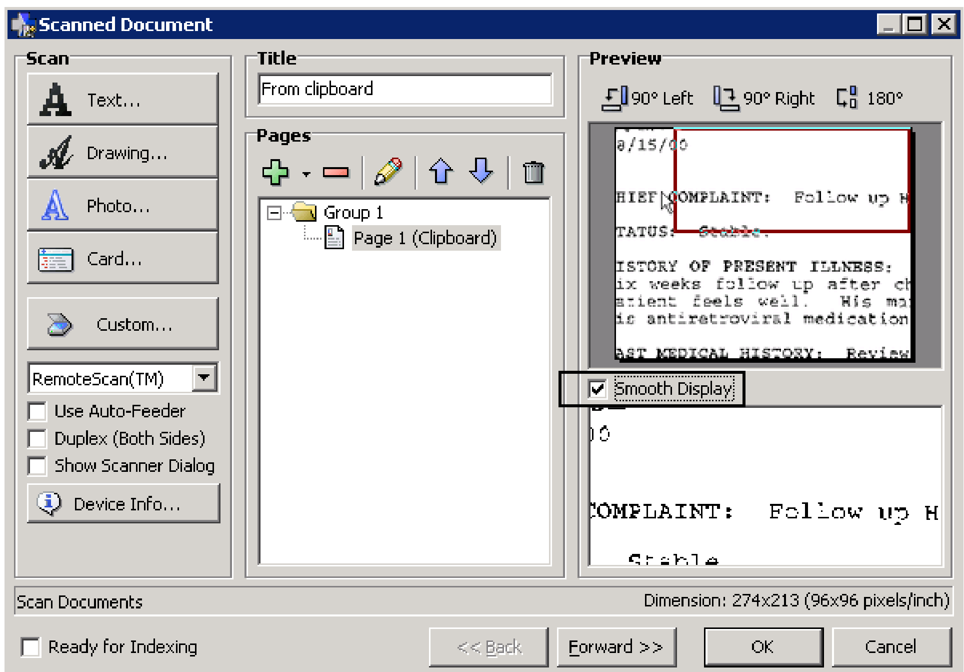
Editing Scanned Images

Before you match a scanned document to a patient or caregiver, you can edit the page name and rotate the page. You can also improve the resolution of the screen display by smoothing the image.

Smoothing displayed images

You can improve the resolution of the image as it appears on the screen. You might want to do this to see details more clearly. You might want to disable this to improve the speed of the display. This does not affect the resolution of the saved image.

1. From Scanned Document, click the page you want to edit.



2. Check **Smooth Display**.
   The images in the upper right and bottom right panes improve.

Editing page names

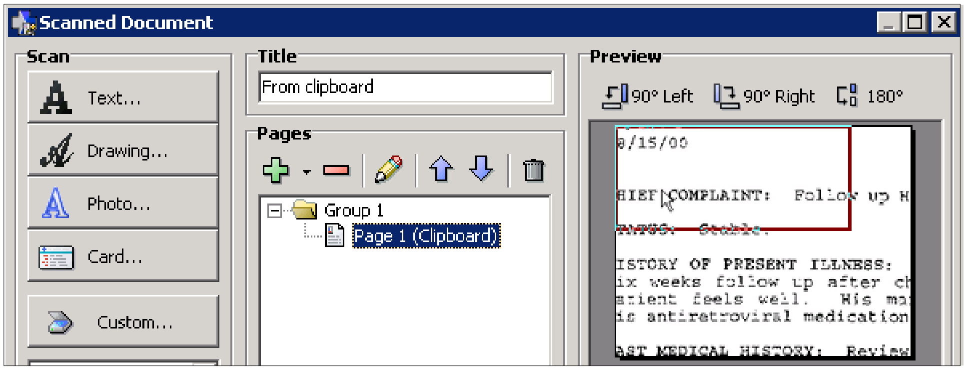
By default, Input Manager assigns the name of “Page # <Document Type>” to each scanned page, for example, Page 3 (Photo) or Page 5 (Text). However, you can change this name. You might want to insert the scanning person’s name as the page name.

1. From Scanned Document, select the page you want to edit and click (Edit Item) ***or*** right-click and select (Edit).
2. In Page Properties, change the *Name* of the page and click **OK**.

Rotating scanned images

Images can be rotated in 90º increments to the left, right, or inverted (flipped). This rotates the page in the screen display as well as in the stored document.

1. In Scanned Document, in the *Pages* pane, select the page you want to rotate.



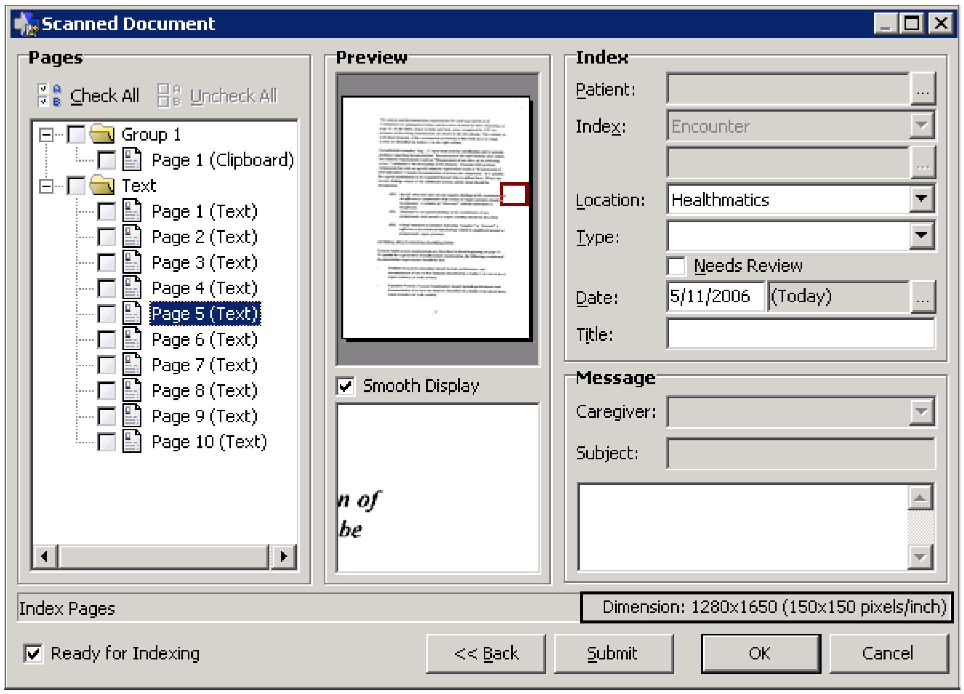
2. To rotate the image, click the Preview pane toolbar buttons to do the following:

Icon	Name	Action
90° Left	Rotate 90 left	Rotate the selected page to the left by 90 degrees.
90° Right	Rotate 90 right	Rotate the selected page to the right by 90 degrees.
180°	Rotate 180	Turn the selected page upside down.

Displaying image properties

If you need to know details of a particular image, such as the image type or image size, use these steps to display image properties. Use this information to improve the resolution if you need to re-scan the image.

1. In Scanned Documents, select a page on the left.
2. Click the thumbnail in the Preview pane to display the image properties in the lower right corner.



Indexing Scanned Documents

Using Input Manager, staff members index scanned documents and then link them to a patient (and possibly encounter, diagnosis, or lab order/plan) in HealthMatics EMR.

Example: Link x-rays with the patient and encounter during which they were ordered.

Index only those documents that have a status of *Ready for Indexing*. You might want to check the image resolution before you index and submit a document. If the resolution is not what you need, you can rescan the image.

Once a scanned document is indexed, it can be saved directly to a patient's chart or sent to a caregiver for review based on whether the indexer selects the *Needs Review* box during the Indexing process. If Needs Review is selected, the review caregiver defaults as follows:

- If the document is linked to an encounter, it defaults to the encounter's caregiver.
- If the document is linked to a diagnosis, it defaults to the primary caregiver.
- If the document is linked to a lab order/plan, it defaults to the ordering caregiver.

Scanned documents can be indexed in two ways:

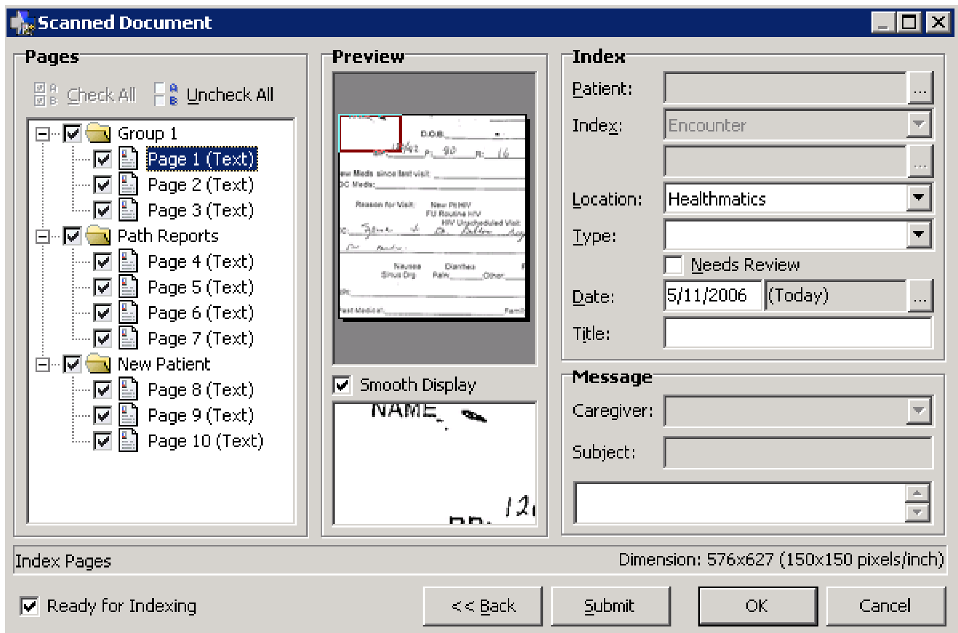
- You can index each scanned document immediately after scanning them (see Indexing documents immediately after scanning on page 30) ***or***
- You or another caregiver can index all scanned documents as a stand-alone indexing task (see Indexing scanned documents as a separate task on page 31).

Indexing documents immediately after scanning

1. In Input Manager, select **Scanned Documents** and scan in a new image either from the primary toolbar or from the Scanned Document dialog box (see Scanning Documents on page 20).
2. At the bottom of Scanned Document, click **Forward** to display an Index and Message panel on the left of the screen.
3. Continue the indexing process as described in Indexing scanned documents as a separate task on page 31, Step 5.

Indexing scanned documents as a separate task

1. In Input Manager, select **Scanned Documents** and click the *Status* down-arrow to select **Ready for Indexing**.
2. Double-click a document to display Scanned Document.



3. In the *Pages* pane on the left, select an item for indexing by doing one of the following:
   - Click **Check All** to select all *Groups* and *Pages* to index them to one patient ***or***
   - Click **Uncheck All** and then select items individually to index.
   - To select individual items, check the box next to the page.
4. **(Optional)** To show a clearer display of the image, select **Smooth Display.** The image in both the upper and lower panes appears clearer.
5. In the *Index* pane on the right, do the following:
   - **Patient** - Click the **Patient** search button (...) to select the appropriate patient.
   - **Index** - If needed, click the **Index** down-arrow to indicate whether the item(s) selected should be linked to a specific *Encounter, Diagnosis,* or *Plan*.

     In the drop-down list box below Index, click the search button ... to select the specific encounter, diagnosis, or plan for the specified patient.
   - **Location** - Click the **Location** down-arrow to select the location for the document(s).
     (It defaults to the scanning location.)
   - **Type** - Click the **Type** down-arrow to select the image group (for example, Pathology Reports) that you want to associate with the document(s). The type defaults to the group of documents (for example, Pathology Reports) that you

selected when you were grouping the scanned pages; however, you can add a description to it.

- **Needs review** - Select the **Needs Review** check box if the caregiver needs to review the scanned document(s).

  NOTE: The *Needs Review* box defaults to checked or unchecked based on the Document Type selected.

- **Date** - Click the **Date** search button to select the document date (which defaults to *Today*).

  NOTE: Use the date recorded on the original image.

- **Title** - Enter a title for the job. The title you entered on the previous dialog box appears here; however, you can change it.

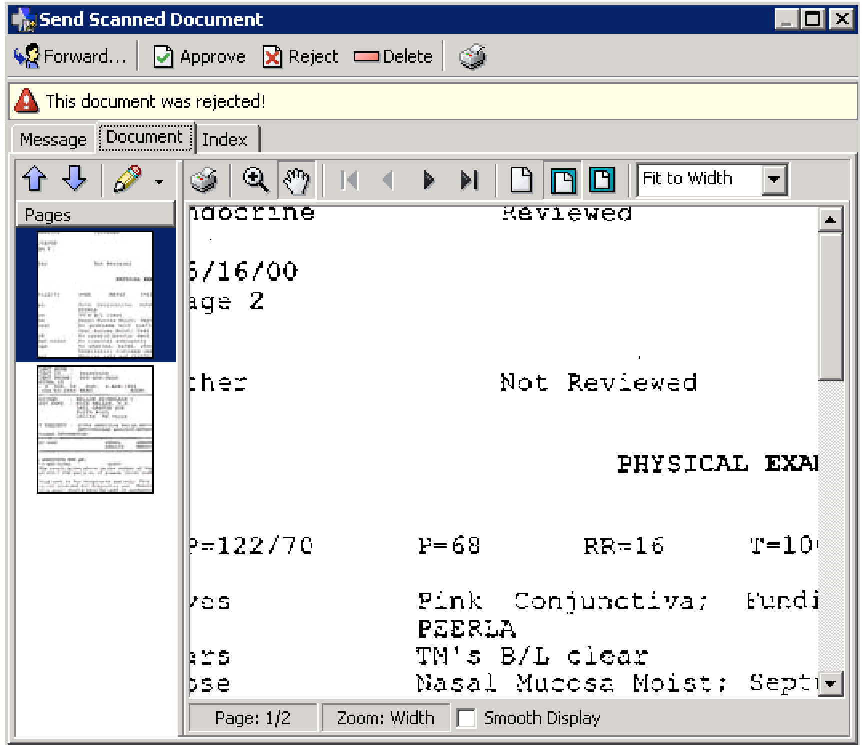
6. **(Optional)** In the text box below *Title*, optionally add a comment.
7. **IF** you checked **Needs Review**, in the *Message* box, click the **Caregiver** down-arrow to select the reviewing caregiver, enter a Subject and, optionally, a comment in the text box below.
8. Do **one** of the following:
   - To send the scanned and indexed documents to a reviewing caregiver for approval, click **Submit** ***or***
   - To save the scanned and indexed document to the patient's chart without caregiver review (**IF** you did not check *Needs Review*), click **OK**.
     The document is saved to the patient chart with a status as *Approved without review*.

Editing rejected scanned documents

When the images in scanned documents need to be manipulated, caregivers can reject them and send them back to be manipulated. To do so, follow the steps below to zoom in on parts of it, or rotate, rename or print a page.

1. From the left pane of Input Manager, select **Scanned Documents**, click the *Status* down-arrow and select **Document Rejected.**
2. Double-click a rejected ( ) document.

3. In Send Scanned Document, click the **Document** tab.



4. Select on a thumbnail in the *Pages* pane then click any of the secondary toolbar icons to do the following:

Icon	Name	Action
	Move up	Move the selected page up.
	Move down	Move the selected page down.
	Edit	Edit the selected page and display the rotate options.
	Rotate 90 left	Rotate the selected page to the left by 90 degrees.
	Rotate 90 right	Rotate the selected page to the right by 90 degrees.
	Rotate 180	Turn the selected page upside down.
	Print	Print selected page.
	Zoom	Magnify the image.
	Move	Change the cursor to a hand, which you can then use to click and drag the image as needed.
	First page	Display the first available page.
	Previous page	Navigate back to the previous page.
	Next page	Navigate to the next page.

Icon	Name	Action
	Last page	Display the last page.
	Zoom 100%	Zoom page to 100%.
	Zoom to page width	Zoom page to fit the width of the window.
	Zoom to whole page	Zoom to show the whole page in the window.
	View settings	From the drop-down list, select the view percent or setting.

To edit page names after indexing

After you index a scanned document to a patient but before you submit it for review, the only thing that you can change is the rotation of the image.

1. From the Scanned Document dialog window, click the page you want to edit.
2. Click (Edit Item) and select the rotation option. Alternatively, right-click and select the rotation option.

To zoom in on images after indexing

Use the zoom feature to increase or decrease the size of the image. Zooming can help you focus on a particular area of the image, when necessary.

1. To zoom in on an image, click (Zoom Cursor) to zoom in closer.
2. To zoom back out, click one of the zoom to page width or whole page options.

Submitting Scanned Documents

After documents are complete and revised as necessary, submit them to a caregiver for review and approval as a chart attachment to the patient record. The default caregiver depends upon how the documents are indexed:

- If the documents are linked to an encounter, they are sent to the encounter's caregiver.
- If the documents are linked to a diagnosis, they are sent to the primary caregiver.
- If the documents are linked to a lab order/plan, they are sent to the ordering caregiver.

Rather than accepting the default, you can send the documents to a different caregiver.

It is not always necessary for the caregiver to review a particular document. If the images are reviewed before they are scanned, the caregiver might not need, or want, to review the document. In this case, do not check the *Needs review* box on the *Index* tab (see Indexing Scanned Documents on page 30).

The scanned documents appear in different places depending on whether they are first submitted for review:

- When the *Needs review* box is checked, the scanned document displays in the caregiver *In Box* for review.
- When the *Needs review* box is **not** checked, the scanned document automatically attaches to the patient chart.

Only caregivers with patient privileges for the patient matched with the document are able to receive the document for review. If a selected caregiver does not have patient privileges, the submission fails.

When indexing a scanned document, if you check the *Needs Review* box, the default caregiver depends upon the document was indexed:

- If the documents are linked to an encounter, they are sent to the encounter's caregiver.
- If the documents are linked to a diagnosis, they are sent to the primary caregiver.
- If the documents are linked to a lab order/plan, they are sent to the ordering caregiver.

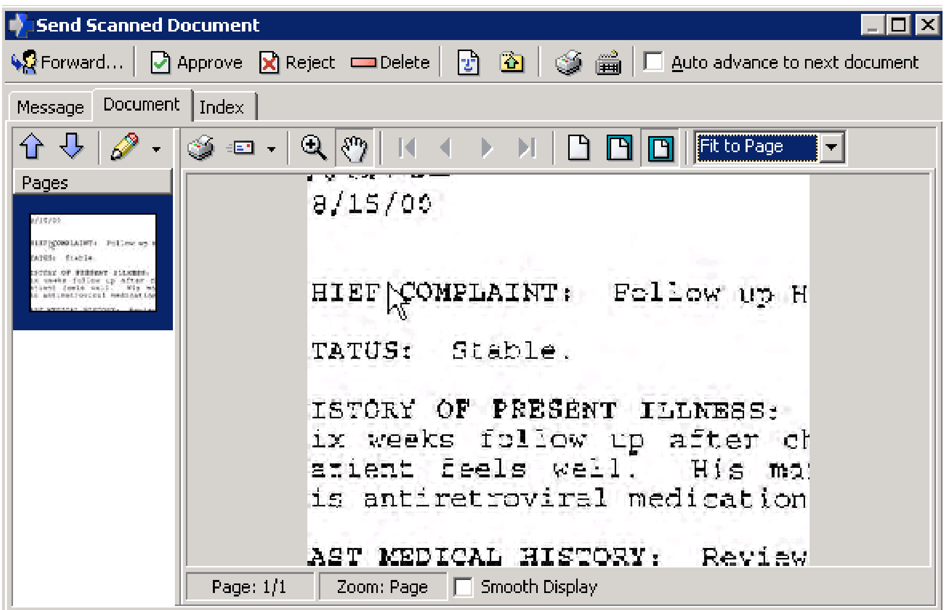
Approving and Rejecting Scanned Documents

When you send scanned documents for approval, they appear in the caregiver's Inbox in HealthMatics EMR. The caregiver can approve, reject, or forward the scanned document to another caregiver.

Caregivers can approve, reject, and/or forward scanned documents to other caregivers in both HealthMatics EMR and in Input Manager.

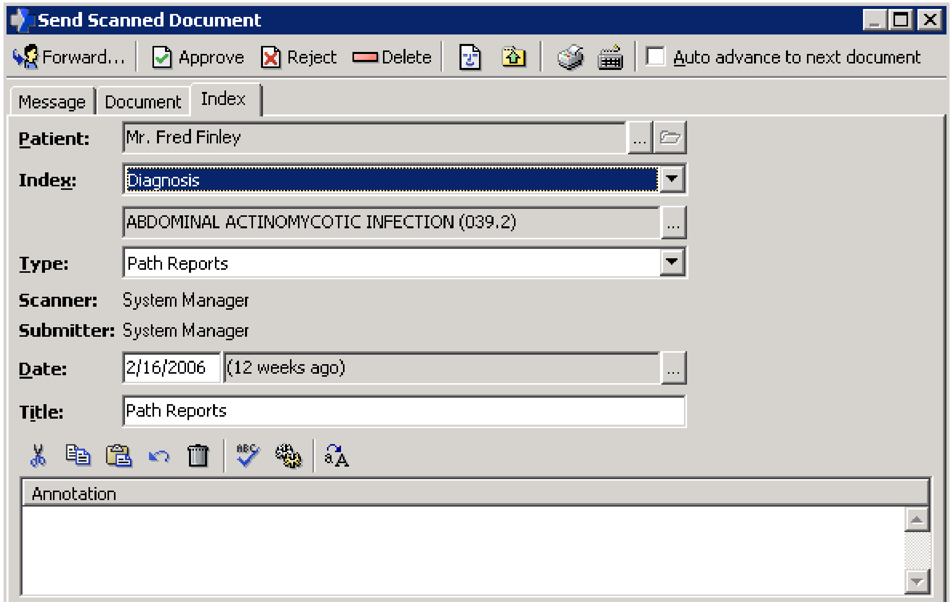
Processing scanned documents in the EMR

1. In the left pane of the **Clinical Module** desktop, select **Documents**.
2. Double-click a scanned document message ***or*** select it and click **Open** to display Send Scanned Document.



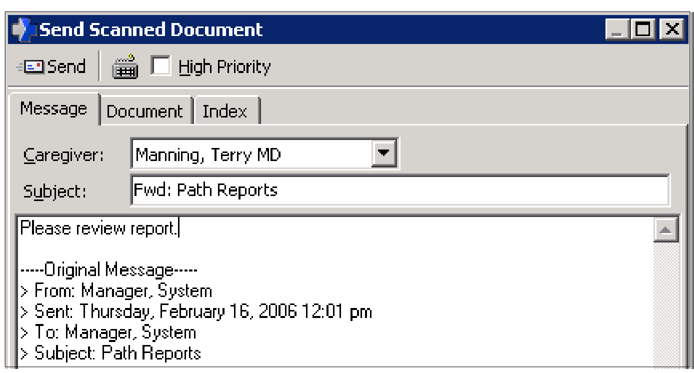
3. In the *Pages* pane, click **thumbnails** to display the pages to the right.

4. Click the **Index** tab to verify and/or correct the indexing information.



5. Then do one of the following:

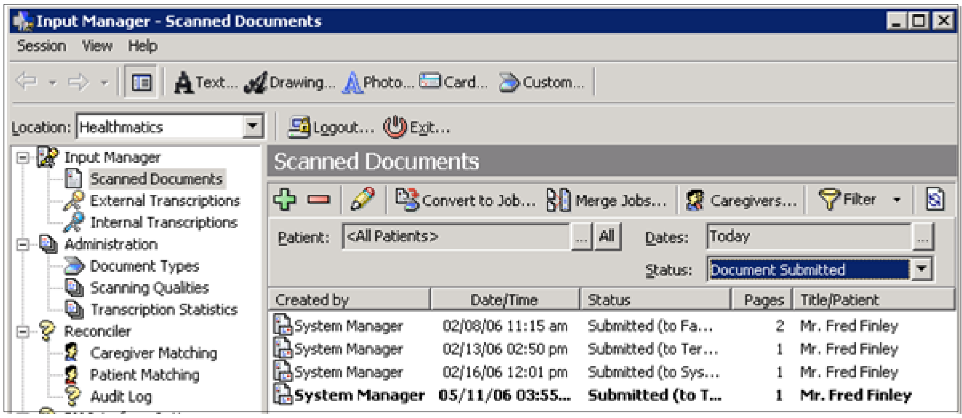
- **Approve** - To approve the document, save it to the patient's chart, and remove the message from your inbox, click **Approve**.
- **Reject** - To send the document back to the scanner, click the **Message** tab, enter a message to the person who scanned the document and click **Reject**.
- **Forward** - To forward the document to another caregiver, click **Forward**.



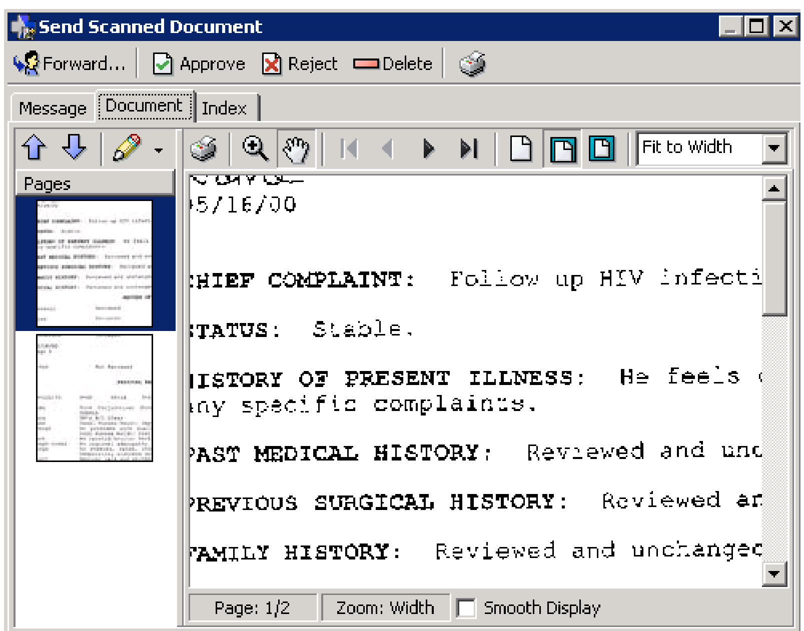
Click the **Caregiver** down-arrow, select the caregiver to receive the document, enter a message and click **Send**.

Processing scanned documents in input manager

1. In the left pane of Input Manager, click **Scanned Documents.**
2. Click the **Status** down-arrow and select **Document Submitted**.



3. Double-click an item ***or*** select it and press **F2** on your keyboard or click (Edit Item).

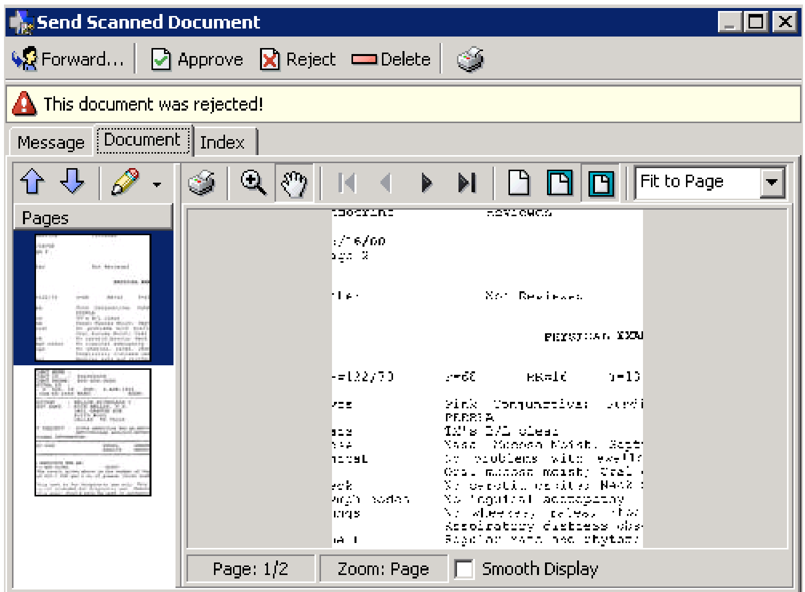


4. Click the **Index** tab and verify and/or correct the indexing information.
5. Then do one of the following:
   - **Approve** - To approve the document, save it to the patient's chart, and remove the message from your inbox, click **Approve**.
   - **Reject** - To send the document back to the scanner, click the **Message** tab, enter a message to the person who scanned the document and click **Reject**.
   - **Forward** - To forward the document to another caregiver, click **Forward**

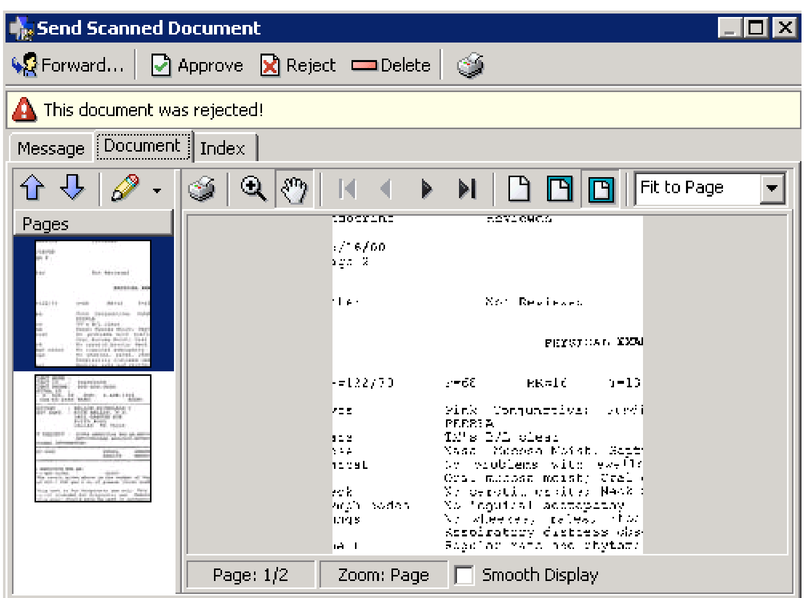
Processing rejected documents

Scanner operators can open up rejected documents and then view, approve, reject, or forward them to another caregiver.

1. In Input Manager's left pane, click **Scanned Documents**.
2. Click the **Status** down-arrow and select **Document Rejected**.
3. Double-click a rejected ( ) item ***or*** select it and press **F2** on your keyboard or click (Edit Item).



4. Click the **Message** tab and read the message to determine why the document was rejected by the reviewing caregiver.
5. Click the **Document** tab to view the document.



6. To edit an image, in the *Pages* pane, click the **thumbnail** and click to rotate it and/or check the **Smooth Display** box at the bottom of the screen to improve the image.
7. To re-index the document to another patient or to another encounter, diagnosis, or lab plan click the **Index** tab (see Indexing Scanned Documents on page 30).
8. Then do one of the following:
    - **Approve -** To approve the document and save it to the patient's chart, click **Approve**.
    - **Forward** - To forward the document back to the caregiver or to another caregiver, click **Forward**, select the caregiver, enter a message, and click **Send**.

Importing Files for Scanning

When images are scanned to the designated directory using a centrally-located scanner, they can be imported into the appropriate document. These images are located in a shared area. While images can be imported from most shared locations, it is best if they are located in one specific shared area on a network directory.

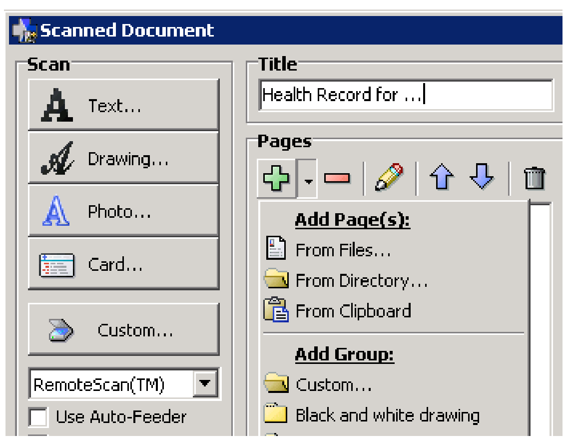
Also, you can import images from any folder. For example, if a dermatologist provided patient images on a memory stick, you can plug the memory stick into the computer and import the images from the removable drive.

You can import images in the following ways:

- Import a single file. This scans one or more files.
- Import multiple files from a directory. This scans all files in the directory.
- Import images sent to the Windows Clipboard.

Importing one or more files

1. In the left pane of Input Manager, select **Scanned Documents**.
2. Press **Insert** on your keyboard ***or***, on the secondary toolbar, click (Add a Scanned Document).
3. At *Title*, enter a name for the file(s) you are going to import.
4. **(Optional)** Create a group into which you can import the files (see Scanning page groupings on page 23).
5. In the *Pages* box, click (Add Item) and select **From Files.**



6. Select the file you want to scan and click **Open**.

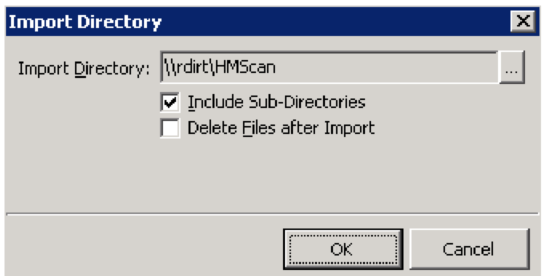
   NOTES
   * To select multiple consecutive documents, press and hold the **Shift** key, while clicking the first and last document to be selected.

   * To select multiple non-consecutive documents, press and hold the **Ctrl** key and click the individual documents to be selected.

7. Continue with the scanned document process as usual (see Editing Scanned Images on page 27).

Importing multiple files from directories

1. In the left pane of Input Manager, select **Scanned Documents**.
2. Press **Insert** on your keyboard ***or***, on the secondary toolbar, click (Add a Scanned Document).
3. At *Title*, enter a name for the file(s) you are going to import.
4. **(Optional)** Create a group into which you can import the files (see Scanning page groupings on page 23).
5. In the *Pages* box, click (Add Item) and select **From Directory.**



6. Click the **Import Directory** search button ( ) and accept or change the default import directory for the location.

   NOTE: The location's default import directory can be changed in the Administration Module.
7. To import sub-directories, check **Include Sub-Directories**.
8. To delete the imported files from the selected directory after you import them, check **Delete Files after Import**.
9. Click **OK** to import the images.

   NOTE: Clicking **Cancel** stops the import and closes the dialog box, but the imported images up to the moment you clicked **Cancel** will appear.
10. Select the file you want to scan. To select multiple consecutive documents, press and hold the **Shift** key, while clicking the first and last document to be selected.

    NOTE: To select multiple non-consecutive documents, press and hold the **Ctrl** key and click the individual documents to be selected.
11. Continue with the scanned document process as usual (see Editing Scanned Images on page 27).

Importing images from clipboards

You might want to import a image that was saved to the Windows clipboard into Input Manager. You can import bit mapped images stored on the clipboard.

1. In the left pane of Input Manager, select **Scanned Documents**.
2. Press **Insert** on your keyboard ***or***, on the secondary toolbar, click (Add a Scanned Document).
3. At *Title*, enter a name for the file(s) you are going to import.
4. **(Optional)** Create a group into which you can import the files (see Scanning page groupings on page 23).
5. In the *Pages* box, click (Add Item) and select **From Clipboard**.
6. Continue with the scanned document process as usual (see Editing Scanned Images on page 27).

Managing Scanned Documents

You can perform several tasks in Input Manager that help make working with scanned documents more efficient. These tasks can also encourage communication between you and the caregiver and possibly increase the accuracy of the documents:

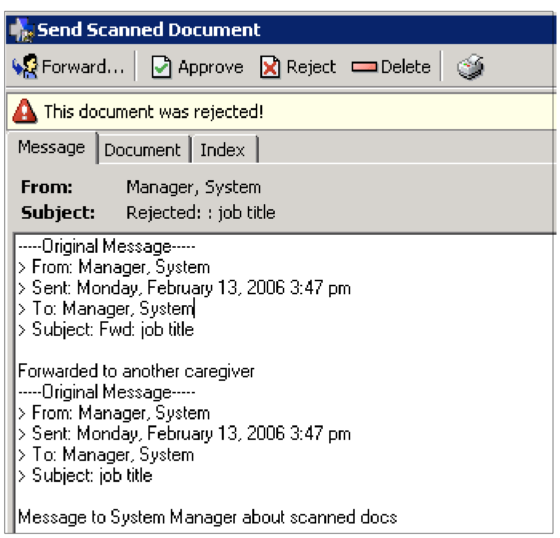
Viewing and editing submitted documents

Once documents are scanned into Input Manager, you can view and edit them in Input Manager. This is useful when a document is rejected, needs to be rotated, or otherwise edited. You can view, link documents to encounters, diagnoses or plans, add comments, submit them for caregiver review or save them to patient charts. In addition, you can view and compare images from multiple dates.

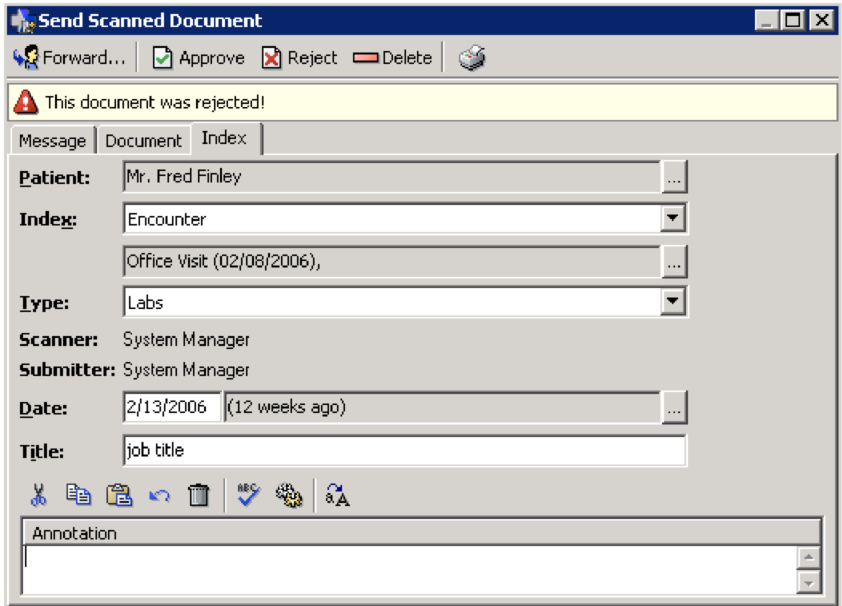
Example: A patient has an echo cardiogram every year. You can compare the documents from one year to the next by viewing saved documents from Input Manager.

1. In the left pane of Input Manager, click **Scanned Documents**.
2. Click the **Status** down-arrow and select one of the following:
   - **Document submitted** - View the image, read messages, edit indexing, approve/reject/delete/forward document to others.
   - **Document rejected** - View the image, read messages, edit indexing, approve/reject/delete/forward document to others.

     NOTE: For *Approved* documents, you can only view the image, and indexing information and annotation. You can also rotate the image or smooth display.
3. Double-click a *Submitted* or *Rejected* document.
4. Click the **Message** tab to view any comments entered by the scanner or caregiver.

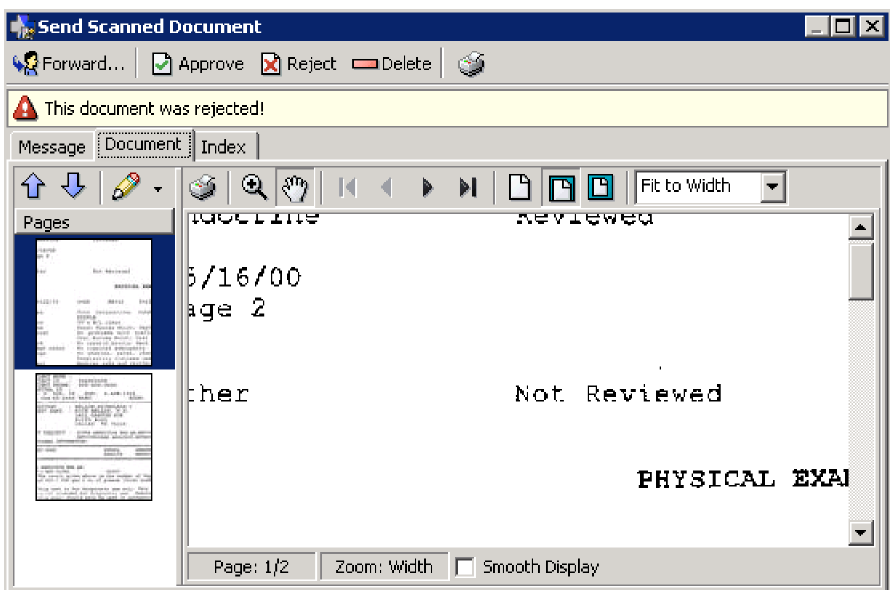


5. Click the **Index** tab to display or edit the indexing information.



See Indexing scanned documents as a separate task on page 31.

6. Click the **Document** tab to display the document in the viewer.



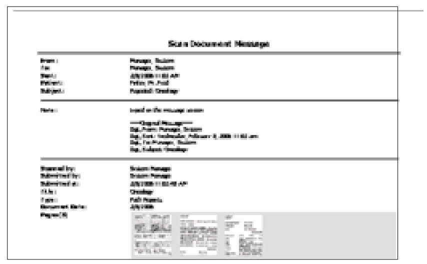
In the left pane, click a **thumbnail** image of a page. The larger image appears to the right.

7. Use the secondary toolbar icons to do any of the following:

Icon	Name	Action
	Move Up	Move selected page up.
	Move Down	Move selected page down.
	Edit Selected Page	- Rotate 90^{o} left. - Rotate 90^{o} right. - Rotate 180^{o} - Turn page upside down.
	Print Documents	Open Print Document to select printer and print options (selected page only or all pages in document).
	Zoom Cursor	Enlarge image at point of cursor.
	Move Cursor	Move image (click and drag).
	Navigate to First Page (**Ctrl+H**)	Display the first page in the document.
	Navigate to Previous Page	Go back one page in the document.
	Navigate to Next Page	Go forward one page in the document.
	Navigate to Last Page (**Ctrl+End**)	Display the last page in the document.
	Zoom to 100%	Enlarge image to its actual size.
	Zoom to Fit Page Width	Resize image to fit the width of the page.
	Zoom to Fit Whole Page	Resize to fit the whole image on the page.
	<drop-down list>	Resize image to any of the standard proportions listed or click **Custom** to select your own. **NOTE:** Once you have adjusted the percentage, the field stays highlighted. At this point, you can use your number pad to change the percentage instantly by entering 1 (100%), 2 (25%), 3 (300%), 4 (400%), 5 (50%), or 7 (75%).

NOTE: Check **Smooth Display** at the bottom of the screen to use a graphic filter to preview the image. It takes longer to display, but presents a better view.

8. Click the primary toolbar icons to do any of the following:

Icon	Name	Action
	Forward	Forward the document to another caregiver.
	Approve	Approve the document (if it does not need to be reviewed by the caregiver) and save it to the patient's chart (see Submitting Scanned Documents on page 35.
	Reject	Reject the document and send it back to the scanner.
	Delete	Delete the entire document and all of its pages.
	Print (**Ctrl+P**)	Open Print Preview to view *Scan Document Message* including indexing information, submission information, and thumbnails of the images. 

Deleting scanned documents

You can delete the entire document including all pages within the document ***or*** delete individual pages within a document.

To delete entire scanned documents

1. In the left pane of Input Manager, click **Scanned Documents**.
2. Use filters to locate the document you want to delete (see Document Search on page 8).
3. In the documents list, select a document, click  (Delete Selected Document) on the secondary toolbar, and then **Yes** to confirm.

NOTE: You can also delete entire scanned documents with a *Status* of *Rejected* or *Submitted* by opening the document and, in the Send Scanned Document dialog box, clicking (Delete Document) on the toolbar.

To delete pages for in progress scanned documents

You can also delete pages for scanned documents with a Status of *Status* is *Scanning in Progress* (documents that have not yet be submitted or approved).

1. In the left pane of Input Manager, click **Scanned Documents**.
2. Click the **Status** down-arrow and select *Scanning in Progress*.
3. Double-click a document ***or*** select it and press **F2** on your keyboard or (Edit Item).
4. In the *Pages* pane, select the page that you want to delete, press **Delete** on your keyboard or click (Delete Item) on the toolbar, and then click **Yes** to confirm.

To delete pages for scanned documents submitted

1. In the left pane of Input Manager, click **Scanned Documents**.
2. Click the **Status** down-arrow and select *Submitted, Rejected*, or *Approved*.
3. On the Scanned Documents secondary toolbar, click **Convert to Job**.

4. Transcriptions

You can process both external and internal transcription from HealthMatics EMR, depending upon the functionality that your practice has purchased.

- **External** - Transcribe notes dictated by caregivers using hand-held devices, into Input Manager. After caregiver approval, link them to the patient's electronic medical record either as SOAP notes located within the H&P Report ***or*** as attachments, standing alone or linked to specific encounters.
- **Internal** - Transcribe notes dictated by caregivers on the *Voice* tabs within *Note* boxes located throughout the HealthMatics EMR application.

External Transcriptions

Caregivers can use external hand-held devices to dictate *transcription* documents that staff members can transcribe into Input Manager and submit to reviewing caregivers for approval. Approved transcription automatically becomes a part of the patient's electronic medical record.

There are two types of external transcriptions: *SOAP* and *General Transcription*

- **General transcription** - Caregivers use external devices to dictate, and a staff member transcribes the dictation into Input Manager, and indexes (matches) it to a patient chart. Caregivers can view the transcription from the face sheet under the transcription type, General.
- **SOAP transcription -** Caregivers use external devices to dictate (Subjective, Objective, Assessment, and Plan) SOAP notes. A staff member transcribes the notes into Input Manager and indexes (matches) them to a patient and encounter. The transcriptionist then submits it to the caregiver for approval, whereupon it becomes part of the H&P Report for the linked encounter. Caregivers can view approved SOAP transcription from the patient's Face Sheet by clicking the visit in the *Encounters* pane. A transcription note displays under each section of the H&P Report for the encounter.

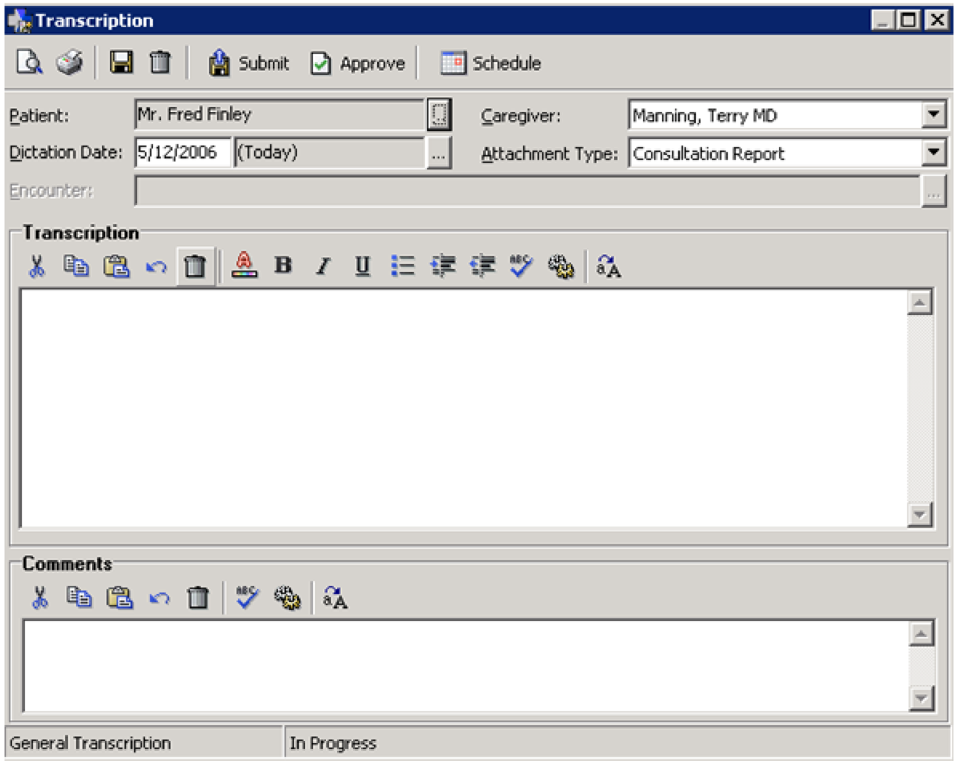
Transcribing from external devices

After a caregiver has dictated notes on a hand-held device, the transcriptionist can play the notes and transcribe directly into Input Manager. The general steps for this are as follows.

1. The caregiver dictates into hand-held devices, beginning with the patient's name, dictation date, encounter date (if any), and the type of document -- *SOAP* note, referral letter, consultation report, progress note, etc. (See the *Attachment Type* drop-down list in the Transcription dialog box in Input Manager for a complete listing of *General* transcription types.)
2. The transcriptionist listens to the dictation, identifies the document as either *SOAP* or *General*, logs into Input Manager, creates the appropriate new document, and transcribes the dictation.

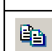
Transcribing general dictation

1. In the left pane of Input Manager, select **External Transcriptions**.
2. Press **Ctrl+G** on your keyboard ***or*** on the secondary toolbar, click . (New Transcription) **> General**.



3. Identify the transcription by doing the following:
   - Click the **Patient** search button ( ) and select the patient to which the transcription refers.
   - Click the **Dictation Date** search button and select the date for the transcription.
   - Click the **Caregiver** down-arrow and select the dictating caregiver's name.
   - Click the **Attachment Type** down-arrow and select the type of document you are creating.
4. In the *Transcription* text box, transcribe the dictation.
5. If needed, select text and click the **Transcription** toolbar icons to format it.

   NOTE: The formatting tools can help place importance on a particular part of the document, or indicate topic changes.

Icon	Name	Action
	Cut	Cut selected text.
	Copy	Copy selected text to clipboard.

Icon	Name	Action
	Paste	Paste text on clipboard.
	Undo	Undo last function.
	Clear	Clear all text in the pane.
	Font	Display the Font dialog box to change the *Font, Font style*, and *Size*, as well as *Effects* and *Color*.
	Bold (**Ctrl+B**)	Bold selected text.
	Italics (**Ctrl+I**)	Italicize selected text.
	Underline (**Ctrl+U**)	Underline selected text.
	Bullets	Click to format text as bullets
	Indent	Move text to the right. Click again to indent further.
	Unindent	Move text to the left.
	Spell Check	Run spell check on the transcription.
	Spell Check Options	Select dictionaries and options for Spell Check.
	Auto-Replace Options	Add or edit Auto-Replace text.

6. **(Optional)** Enter comments to the caregiver at the bottom of the dialog box. These comments are not part of the transcription and do not appear in the patient's chart.

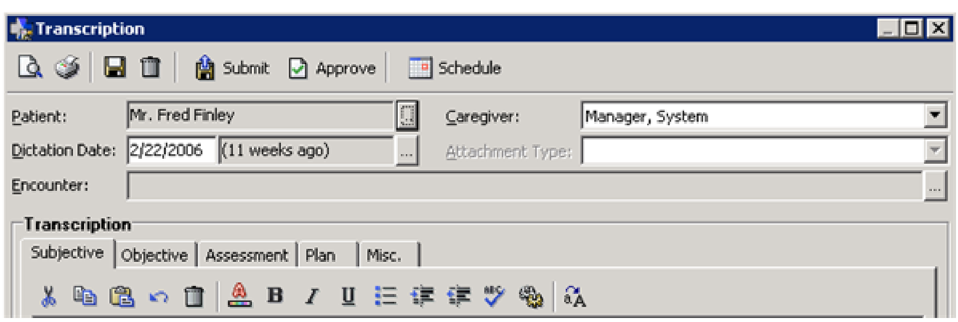
7. Use the primary toolbar icons to review and submit the transcription for approval (see Reviewing and submitting transcriptions for approval on page 52).

NOTE: You can also click **Schedule** to search through the caregiver's schedule to check for missing transcription on a given date (see Searching schedules for missing transcriptions on page 54).

Transcribing SOAP dictation

1. In the left pane of Input Manager, select **External Transcriptions**.

2. Press **Ctrl+S** on your keyboard ***or*** on the secondary toolbar, click . (New Transcription) **> SOAP**.



3. Identify the transcription by doing the following:

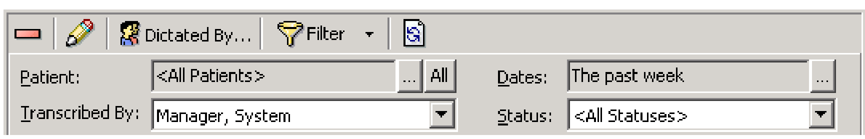
- Click the **Patient** search button ( ) and select the patient to which the transcription refers.
- Click the **Dictation Date** search button and select the date the transcription was dictated.
- Click the **Caregiver** down-arrow and select the dictating caregiver.
- Click the **Encounter** search button and select the associated visit (if any).

4. In the *Transcription* text box, click tabs (**Subjective, Objective, Assessment, Plan, Misc.**) and transcribe the dictation on each tab as appropriate.
5. Review the transcription and use the secondary toolbar icons as needed to revise and format it (see Transcribing general dictation on page 50 for a description of the icons).
6. Use the icons to review and submit the transcription (see Reviewing and submitting transcriptions for approval on page 52),

Reviewing and submitting transcriptions for approval

After transcribing dictation in Input Manager (see Transcribing from external devices on page 49 and Transcribing voice notes from the EMR on page 55), you can review the transcription to check for errors and see how the transcription will look before submitting it for approval.

1. In the left pane of Input Manager, select **External** (or **Internal**) **Transcriptions**) as appropriate.



2. Click to select a quick filter (see *Quick Filters* in the ***Application Reference*** manual), or set any or all of the following filters to locate the document to review.
   - **Dictated by** - Select the caregivers for whom you want to see dictation and click **OK**.
   - **Patient** - Click the search button ( ) to select a patient or click **All**.
   - **Transcribed by** - Click the down-arrow and select the name of the transcriptionist or *All Grantors*.
   - **Dates** - Click the search button ( ) to open Set Date Range and select the date(s) for which you want to see dictation.
   - **Status** - Select the status of the documents you want to view (*Current Batch, In Progress, Submitted, Approved, Disapproved*). Alternatively, select *All Statuses* or *All Requiring Action*.
3. Double-click a document to open it ***or*** select it and press **F2** on your keyboard or click (Edit Selected Item).

4. Review the transcription and use the secondary toolbar icons as needed to review and format it.

(See Transcribing general dictation on page 50 for a description of the icons).

5. Click icons on the primary toolbar to do any of the following:

NOTE: The icons available depend upon the *Status* of the document selected.

Icon	Name	Action
	Preview	Click to preview the formatted document.
	Print	Click to print the document for review before submitting it for approval.
	Save	Click to save the document if you are not yet ready to submit if for approval. The document remains in Input Manager with a *Status* of *In Progress*.
	Clear	Click to clear indexing information from this transcription, so that you can begin again.
	Forward	Click to forward this transcription to another caregiver.
	Submit	Click to send the transcription and your message to the selected reviewing caregiver for approval. The message with the transcription attached appears in the *Documents* view of the caregiver's **Inbox**. The *Status* in Input Manager changes to *Submitted*.
	Approve	Used by the reviewing caregiver to approve the transcribed document and attach it to the patient's chart.
	Reject	Used by the reviewing caregiver to reject the transcribed document and return it to the transcriptionist for revision (with comments).

6. If you are ready to submit the transcription to the caregiver for approval, click **Submit** to display Send Transcription.

7. Verify or change the *Caregiver* and enter a *Subject*.

8. On the Message tab, enter a note to the approving caregiver if desired.

   NOTE: *Messages* and *Comments* serve as important communication between the caregiver and the transcriptionist. Text in the *Comments* or *Message* boxes should identify misunderstandings or clarify transcription content. Each comment saves as a permanent part of the transcription record, but does **not** display on the patient's H&P Report.

9. If the caregiver is waiting for the transcription, select the **High Priority** box at the top of the screen.

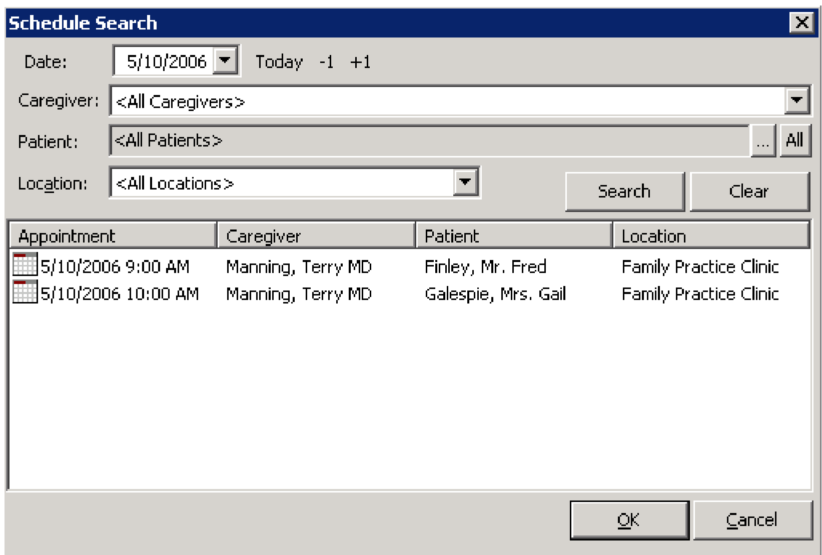
10. Click **Send**.
    The transcription with the message attached appears in the *Documents* view of

the caregiver's *Inbox* and the Documents icon (9) on the caregiver's status bar increases by one.

Searching schedules for missing transcriptions

To see a list of patients seen by caregivers on a given date to determine whether dictation has been received for all patients seen on that date, you can quickly check caregiver schedules.

1. In the left pane of Input Manager, select **External Transcriptions** and click and **General** or **SOAP** to display the Transcription dialog box.
2. On the primary toolbar, click **Schedule**.



3. At *Date*, select a date.
4. Select the *Caregiver*, *Patient*, and *Location* ***or***
   Select *All Caregivers*, *All Patients*, and *All Locations*.
5. Click **Search**.

   NOTE: You can quickly change dates by clicking any of the following and then clicking **Search** again:
   * **Today -** To return to today's schedule
   * **-1 -** To search the schedule for one day previous to the selected date
   * **+1** To search the schedule for one day after the selected date
6. To exit and return to the Transcription dialog box, click **OK**.

internal Transcriptions

In practices that have purchased voice notes functionality, caregivers can dictate notes directly into the HealthMatics **Clinical Module** by clicking the **Voice** tab in any *Note* dialog box.

The **Clinical Module** sends the dictation to **Input Manager**, where a transcriptionist transcribes the recording. The transcriptionist can send the transcriptions directly to the chart, if given permission, or can send them for review by the caregiver. The caregiver can play the dictations and compare them to the transcribed text ensuring that they match. If the caregiver approves the transcription, it is saved in the patient's chart.

Internal transcriptions appear in the notes of the contact screen used in HealthMatics EMR. They also appear in each section of the H&P representing where the dictation was recorded.

Transcribing voice notes from the EMR

When a caregiver dictates a note on any *Voice* tab in the HealthMatics EMR **Clinical Module**, it is listed in **Input Manager** as an internal transcription. Transcriptionists log into Input Manager to listen to the dictation and transcribe the note. Transcribed notes are sent back to the dictating caregiver for approval. When approved, they become part of the *H&P Report* for the respective patient visit.

With appropriate permission, transcriptionists can also '"approve" and save the transcription to a patient's chart.

1. In the left pane of Input Manager, select **Internal Transcriptions**.

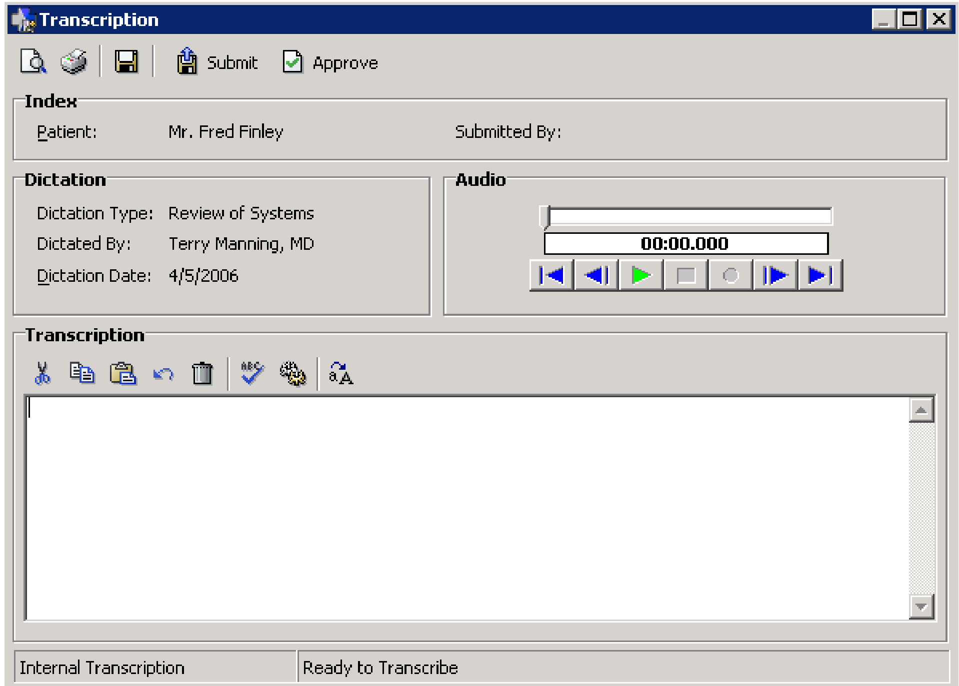
   NOTE: There is no on the Internal Transcriptions secondary toolbar, because internal notes are sent automatically to Input Manager and become part of the H&P Report. So you don't have to create a new document.

2. On the secondary toolbar, select a quick filter (Filter) ***or*** use the filters to locate the dictation:

   NOTE: For instructions for creating and using quick filters, refer to *Quick Filters* in the ***Application Reference*** manual.

   - **Dictated by -** Select the caregivers for whom you want to see dictation and click **OK**.
   - **Patient -** Click the search button (...) to select a patient ***or*** click **All**.
   - **Transcribed by -** Defaults to your user name.
   - **Dates -** Click the search button (...) to open Set Date Range and select the date(s) for which you want to see dictation.
   - **Status -** Select <*All Requiring Action*>.

3. Double-click an item to open it ***or*** select it and press **F2** on your keyboard or (Edit Selected Item).



4. Click (Play) to listen to the dictation as you enter the *Transcription* text box at the bottom of the dialog box.

5. Select text and click the *Transcription* toolbar icons to format it, as described in Transcribing general dictation on page 50.

6. Review and submit the transcription for approval (see Reviewing and submitting transcriptions for approval on page 52).

In HealthMatics EMR Clinical Module, approved internal transcription can be viewed in the appropriate section of the *H&P Report* for the visit (*History of Present Illness, Review of Systems, Physical Exam*, etc.).

5. Administration

In the *Administration* section of Input Manager, you can create and edit scanned document types, set scanning parameters, and view transcription statistics.

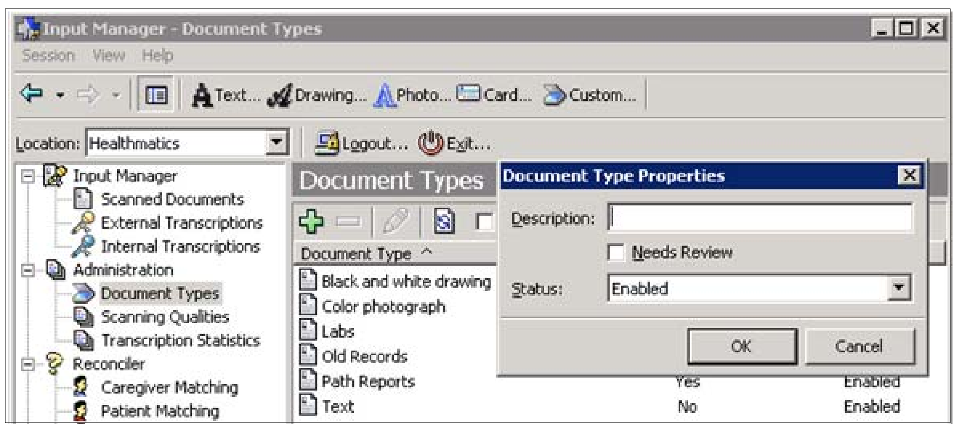
Document Types

Each document that is scanned into HealthMatics EMR is assigned a *Document Type*. Document types represent a group of similar documents (**Examples:** pathology records, nursing home records, or patient results.

In Input Manager *Administration*, you can add, edit, or delete document types.

Adding document types

1. From the left pane of Input Manager, under *Administration*, select **Document Types**.
2. Click (Add Document Type) ***or*** right-click and select **Add**.



3. At *Description*, enter the name of the new document type.
4. Select **Needs Review** if this type of document **must** be reviewed by a caregiver.
5. Click **OK** to save the document type.

Editing document types

1. From the left pane of Input Manager, under *Administration*, select **Document Types**.
2. Select a document type and click (Edit Document Type).
3. Change the *Description, Needs Review*, or *Status* (*Enabled, Archived*) of the document type and click **OK**.

Archiving or deleting document types

You can delete a document type that you no longer need. Document types are archived initially.

1. From the left pane of Input Manager, under *Administration*, select **Document Types**.
2. Select a document type and press **Delete** on your keyboard ***or*** click (Delete Document Type on the secondary toolbar and click **Yes** to confirm.
   The document type is archived.
3. To delete the document type permanently, on the secondary toolbar, select the **Show Archived** box to locate the archived item.
4. Select the archived item and press **Delete** on your keyboard ***or*** click (Delete Document Type) and **Yes** to confirm.

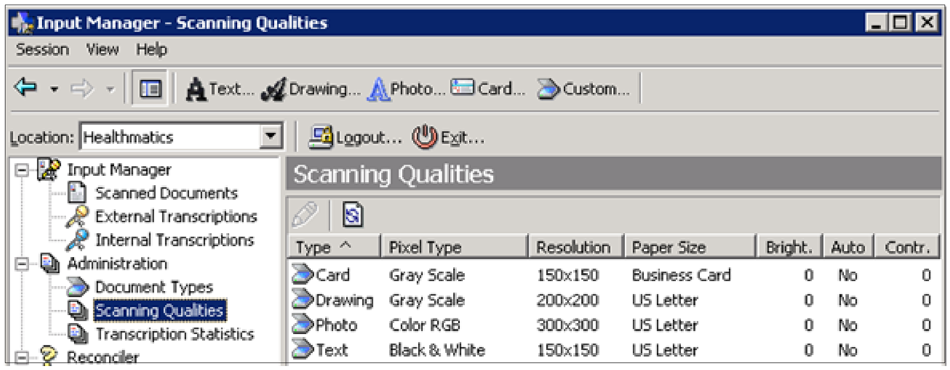
Scanning Qualities

For each type of scanned document, you can define the scanning resolution and other quality settings.

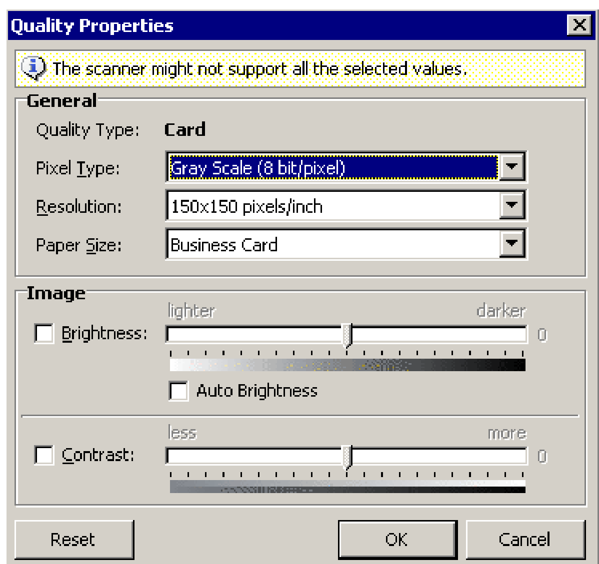
Example: You might want to choose high quality resolution settings for photos, yet choose low quality resolution settings for business or insurance cards.

You can set default scanning qualities for cards, drawings, photos, or text. However, scanning operators can change these defaults as needed for individual jobs.

1. In the left pane of Input Manager, under *Administration*, select **Scanning Qualities**.



2. Double-click a *Type* ***or*** select it and press **F2** on your keyboard or click (Edit Quality).



3. Change the *Pixel Type, Resolution, Paper Size, Brightness, Auto Brightness*, or *Contrast.*

NOTES
* For each of these, you can choose a setting or the setting of *Scanner Default*, which uses the default settings of the specific scanner.

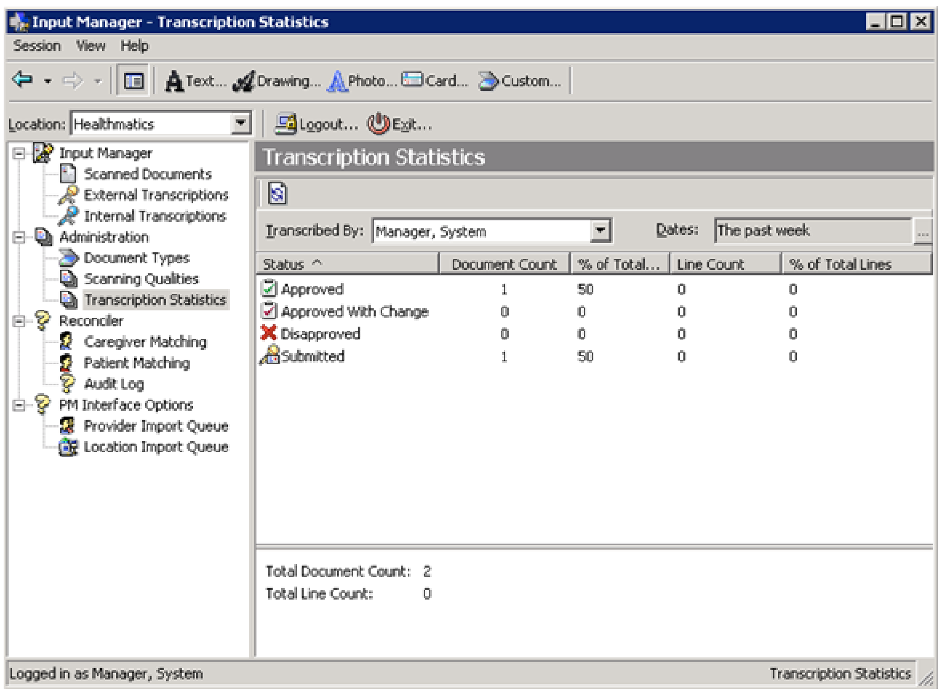
*If the scanner does not support the chosen options, ignore the settings. To **not** apply a value, select **Scanner Default** in the drop-down lists or deselect the check boxes.

4. Click **OK** to save the changes.

Transcription Statistics

Input Manager provides statistics to help gauge transaction statistical performance based on the status of all completed (*SOAP* and *General*) documents after submission for caregiver review. Transcription statistics can be displayed for all completed documents or documents transcribed within a specified date range.

1. In the left pane of Input Manager, under *Administration*, select **Transcription Statistics**.



2. Click the **Transcribed by** down-arrow and select a transcriptionist's name.
3. Click the **Dates** search button (...) and select a date range.
4. For each transcriptionist, view the total number of documents transcribed, the total number of lines transcribed, and the percentages of documents approved, disapproved, etc.

6. Reconciler

You can match test results received electronically from external labs with caregivers and patients in HealthMatics EMR. If the interface cannot match a result to a caregiver/patient in HealthMatics ERM, the incoming unresolved results appear in the *Reconciler* of Input Manager. From the Reconciler, you can manually match the results to the caregiver and patient manually in your EMR database. Once matched, the test results are saved automatically to correct patient's record.

The Reconciler in Input Manager is a secure system. You can set security to determine who is authorized to initiate the process to obtain results from external laboratories, as well as who can accept the results.

Patients are associated with locations through their ordering caregivers. The Reconciler provides location level security and filters patients from caregiver lists. Caregiver-defined provider types can be added or removed from caregiver selection lists. Patient data access is restricted by controlling location privileges to caregivers in the HealthMatics EMR Administration Module.

Reconciler Features

The *Reconciler* includes the following features:

- **Caregiver matching** - View a list of ordering caregivers received with patient results that do not match to the HealthMatics EMR database. Use this feature to match unresolved results to the appropriate caregiver in HealthMatics EMR, and to view and/or clear results as needed (see Caregiver Matching on page 63).

  NOTE: Unmatched results caregivers must be matched to EMR caregivers before unmatched patients for those results appear on the screen.

- **Patient matching** - View a list of patients (and their associated lab tests) whose caregivers match the EMR database, but the results do not match patients. You can match unresolved patients with the correct patient in the HealthMatics EMR database or to clear results if necessary (see Patient Matching on page 72).

- **Audit log** - View all caregiver and patient reconciliation activities, such as matches performed, deleted, and reassigned; view details on all patient results received; and view any deleted results (see Audit Log on page 80).

Result Notification Hierarchy

The *Reconciler* posts the results to HealthMatics EMR and displays a message in HealthMatics EMR indicating that results are updated (referred to as the *Result Notification*).

Only HealthMatics EMR users receive result notifications. Referring physicians are added to EMR, but do not have logins and do not receive notifications.

A notification hierarchy exists for each result interface if HealthMatics EMR cannot identify the ordering caregiver. There are six types of caregivers that can be notified and the following shows the typical notification order, although it can be customized for each facility:

- Ordering provider
- Requisition provider
- Preferred provider
- Default provider
- Attending provider
- Result CC'd provider

Each caregiver is assigned a priority. If the first priority caregiver cannot be located, the second will be notified. If the second cannot be located, the third will be notified, and so on.

HealthMatics EMR can identify a provider, based on the information provided in the result transaction and information stored in HealthMatics EMR. The notification priority is set for these providers when the HealthMatics specialist configures the interface for your facility.

Caregiver Matching

After results have been downloaded, the *Reconciler* attempts to match results to caregiver and patient names and sends matched results directly to the HealthMatics EMR. However, the reconciler sometimes cannot match the results. The following are possible reasons:

- **Caregiver name does not match** - The ordering caregiver name sent with the results does not match a HealthMatics EMR caregiver.
- **Caregiver external ID does not match** - The caregiver's ID sent with the results does not match the HealthMatics EMR caregiver ID (UPIN).

You can match those results to a caregiver, add a new caregiver, or delete the unmatched results from Input Manager.

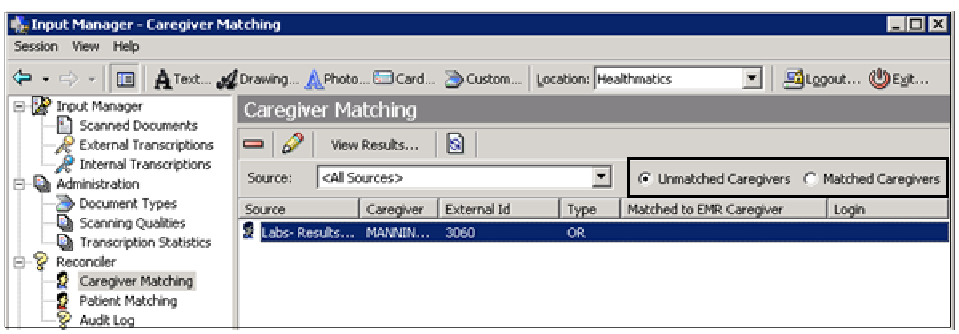
Viewing the list of unmatched results

When downloaded results for a caregiver cannot be matched to the HealthMatics EMR application ordering caregiver, the caregiver name sent with the results displays on the *Caregiver Matching* view in the *Reconciler*. Unresolved matches occur when your practice management system stores the name one way and the external laboratory stores it another. Matching these caregiver names in the Reconciler also enables future results to be received from the external laboratory and recorded automatically in the HealthMatics EMR.

You must first match the results to an EMR caregiver before you can match results to patients.

NOTE: After matching the incoming results caregiver to a caregiver in the HealthMatics EMR database, you can break the match, if necessary. Breaking the match affects only future results. It does not affect results already sent to the EMR (see Deleting caregiver matches on page 67).)

1. In the left pane of Input Manager, under *Reconciler*, select **Caregiver Matching**.



   NOTE: The view defaults to *Unmatched Caregivers*. To list results already matched to caregivers, click the **Matched Caregivers** radio button.

2. Click the **Source** down-arrow and select either *<All Sources>* to match results for all results interfaces ***or*** select a specific results interface.

3. Select an unmatched item and use the secondary toolbar icons to do the following:

Icon	Name	Action
	Delete	Delete the selected caregiver match. Caregiver matches cannot be deleted if results are unmatched.
	Edit	View incoming caregiver name, Id, and UPIN, and test results for the selected item (see Caregiver Matching on page 63).
	View Results	View details of the results received.
	Refresh	Refresh the list of results in the Caregiver Matching view.
	Source	List all results interfaces available.
	Show Unmatched Caregivers	List result items that the system was unable to match to EMR caregivers.
	Show Matched Caregivers	List result items matched to EMR caregivers.

For the unmatched results, you can do the following:

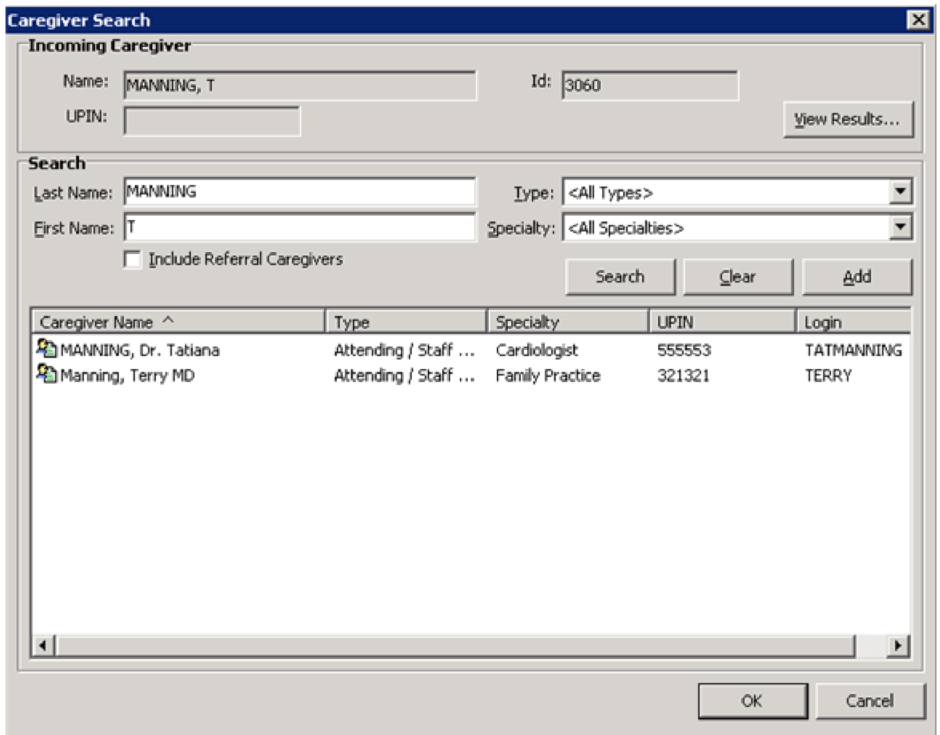
- Identify an unknown caregiver (called the *incoming caregiver*) and match it to a correct ordering caregiver.
- Identify an unknown caregiver and match it to a caregiver you add (see Adding new caregivers in the reconciler on page 66).
- Selectively remove unwanted tests and their associated results (see Deleting results not matched to patients on page 79).

Matching results to caregivers

1. In the left pane of Input Manager, under *Reconciler*, select **Caregiver Matching.**

   NOTE: The view defaults to *Unmatched Caregivers*. To view a list of results already matched to caregivers, select the **Matched Caregivers** radio button.

2. Double-click an unmatched item **or** select it and press **F2** on your keyboard or click  (Caregiver Match Properties).

   Caregiver Search displays a list of all caregivers in the HealthMatics EMR database whose last name and first initial are the same as the *Incoming Caregiver*.

3. Look at the caregiver information at the top of the screen, and determine if the *Incoming Caregiver* should be matched with any of the EMR *Caregiver Names* in the box below.

4. If none are appropriate, click **Clear** and then, in the *Search* box, enter caregiver information and click **Search**.

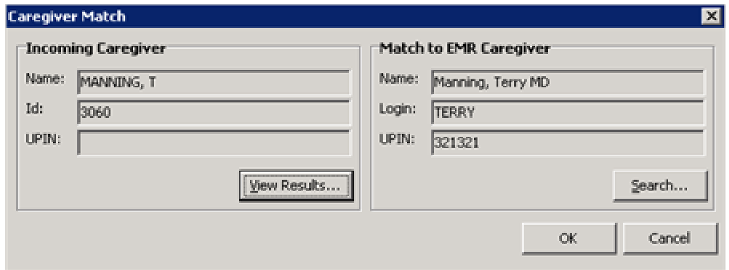
   NOTES
   ***** To match the incoming caregiver with a referring doctor, check **Include Referral Caregivers** to include them in the list of displayed caregivers.

   * To preview or print the results before you match the caregivers, click **View Results.** See Viewing and printing result reports from reconciler on page 67.

   * If none of the caregivers listed are correct, you can add a caregiver to the HealthMatics EMR, if appropriate, and then match the incoming caregiver to the

newly added caregiver. Click **Add** and see Adding new caregivers in the reconciler on page 66.

5. In Caregiver Search, double-click a caregiver that you think might match.



The Reconciler shows the *Incoming Caregiver* information on the left and the HealthMatics EMR caregiver to whom you are matching on the right.

6. To accept the match, click **OK**.

The entry in *Caregiver Matching* is removed and the Reconciler automatically rescans all results associated to that caregiver for patient matches. One of the following occurs:

- If patient criteria match with an existing patient in HealthMatics EMR, results are sent to that patient's chart and a Results Notification message is sent to the appropriate caregiver.
- If patient criteria do not match with an existing patient in HealthMatics EMR, results display in *Patient Matching*.

Adding new caregivers in the reconciler

If the *Reconciler* does not provide any matches or the matches are not correct, you can add a caregiver to the HealthMatics EMR and then match the incoming caregiver to this newly added caregiver.

1. In the left pane of Input Manager, select **Caregiver Matching**.
2. Double-click an unmatched item **or** select it and press **F2** on your keyboard or click  (Caregiver Match Properties)
3. In Caregiver Search, click **Add** to display Caregiver Properties.
    - Enter the *Identification* and *Address* information and click **OK**.
      For detailed instructions, refer to *Caregiver Properties* in the ***Administration Module*** manual.
    - In Caregiver Locations, select the locations where the caregiver provides services and click **OK**.
      For detailed instructions, refer to *Caregiver Locations* in the ***Administration Module*** manual.
4. Back in Caregiver Search, click **Search**.
   The new caregiver appears in the Caregiver Search dialog box if the caregiver has the same last name or UPIN ID.
5. Match the new caregiver to unmatched results, as usual (see Caregiver Matching on page 63).

Deleting caregiver matches

You can break the match between an incoming ordering caregiver and the HealthMatics EMR caregiver by deleting the match. If you delete the match, any future results for that incoming caregiver will not match to that HealthMatics EMR caregiver. The next time a result is sent with that caregiver, it will display in the unmatched caregiver screen.

1. In the left pane of Input Manager, select **Caregiver Matching**.
2. Select the **Matched Caregivers** radio button.
3. In the list of matched caregivers that displays, select the caregiver name that should not be matched and press **Delete** on your keyboard ***or*** click (Delete Caregiver Match) and **Yes** to confirm.

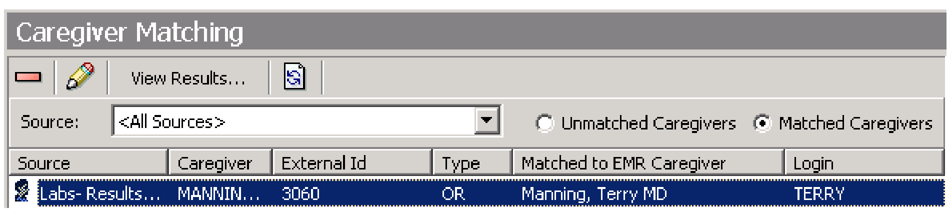
Viewing and printing result reports from reconciler

In Input Manager, the *Reconciler* provides several options for viewing and printing reports for results received electronically.

NOTE: To view results for all caregivers and patients, use the *Audit Log*. You can search by patient name, ordering caregiver, or by order requisition or accession number (see Audit Log on page 80).

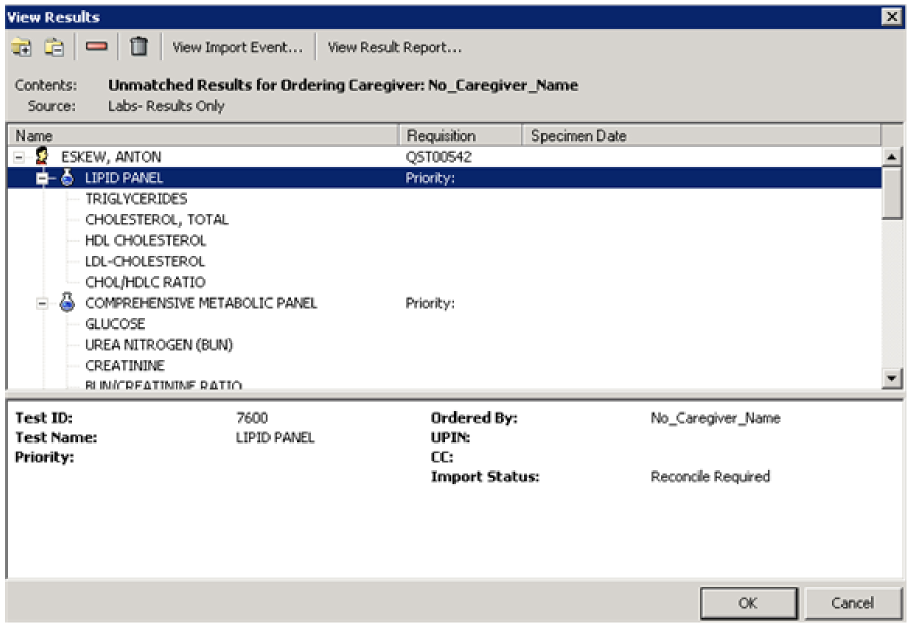
You can view the results in a dialog window ***or*** view them in a report, which you can then print.

1. In the left pane of Input manager, under *Reconciler*, select **Caregiver Matching**.

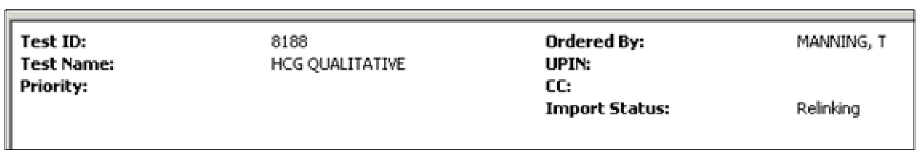


2. Select the *Source* and either *Unmatched Caregivers* or *Matched Caregivers* to locate the item you wish to view.

3. Select a results item and, on the secondary toolbar, click **View Results**.



- Highlight the patient's name to view demographic and other information about the patient in the preview pane.
- Highlight a test name to view the results in the preview pane.

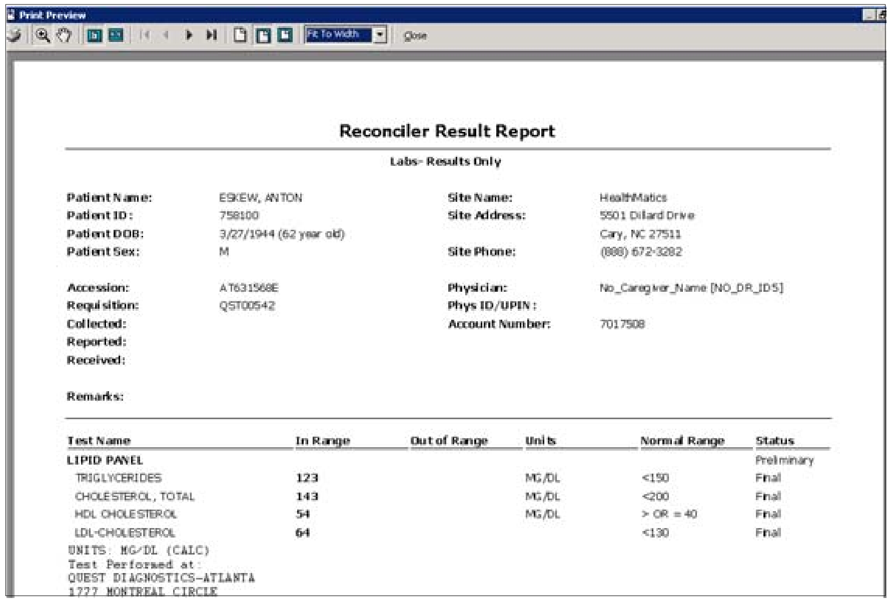


- Click toolbar icons to do any of the following:

Icon	Name	Action
	Expand All	Expand all results in the tree.
	Collapse All	Collapse all results in the tree.
	View Import Event	View import event details.
	View Result Report	Preview and print the Result Report.

NOTE: Delete and **Clear** are disabled if you selected *Matched Caregivers* on the previous screen.

4. To view the Results Report in Print Preview, click **View Result Report**.



View the following sections in the report:

- **Header information**

Information Type	Items
Patient information	Patient Name, ID, Sex, Age
Report information	Accession ID, Requisition ID, Reported, Received, and Collected dates and times
Site information	Includes name, address, and phone number of the healthcare facility or location.
Caregiver information	Ordering Physician, Physician ID/UPIN, and physician location account number
Remarks	Comments, if any

- **Column information**

Item	Description
Test name	Ordered panel name with individual test holding the result indented below
In range	Test result value within valid reference range. If test not performed, DNR (did not run) displays.
Out of range	Test results not in the valid range *Low-Low, Low, Medium, High, High-High, or Panic* display
Units	Measurement of last ranges (for example, ratios, liters, or seconds)
Normal Range	Range of normal values
Status	Status of results (*Preliminary, Final, Reviewed*)
Notes	General comments regarding lab orders or test results

NOTE: All report information is provided by the external laboratory that provides the download files.

- In Print Preview, use toolbar icons to do the following:

Icon	Name	Action
	Print	Print selected page.
	Zoom	Magnify the image.
	Move	Change the cursor to a hand, which you can then use to click and drag the image as needed.
	View One Page	View one page at a time.
	View Two Pages	View two pages at a time.
	First page	Display the first available page.
	Previous page	Display the previous page.
	Next page	Display the next page.
	Last page	Display the last page.
	Zoom 100%	Zoom page to 100%.
	Zoom to page width	Zoom page to fit the width of the window.
	Zoom to whole page	Zoom to show the whole page in the window.

Icon	Name	Action
	<custom view>	From the drop-down list, select the view percent or setting.
	Close	Close the preview window.

Patient Matching

When downloaded results for a patient cannot be matched to a HealthMatics EMR patient, the items appear in *Patient Matching* in the Reconciler. Unmatched results can happen if your practice management system stores the patient name one way and the external laboratory stores it another. Matching these unresolved patient names also enables future results to be received from the external laboratory and recorded automatically in the HealthMatics EMR.

HealthMatics EMR uses five identifiers to match patients in the reconciler: patient name, date of birth, gender, SSN, and patient ID. There are four combinations of these that can be selected as the matching criteria for each result interface:

- Patient name, date of birth, gender, SSN, patient ID
- Patient name, date of birth, gender, SSN
- Patient name, date of birth, gender, patient ID
- Patient name, date of birth, gender,

The HealthMatics Interface Specialist configures the interface and chooses the patient matching criteria based on your facility's needs.

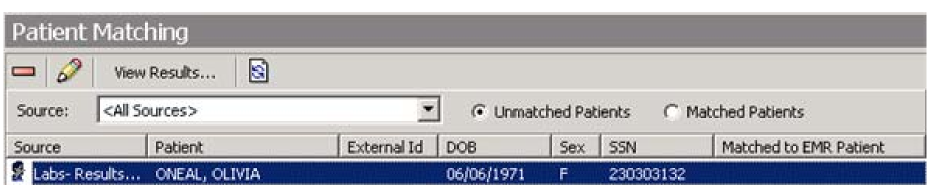
NOTES

- You must match caregivers in *Caregiver Matching* before you can see their unmatched patients in *Patient Matching* (see Caregiver Matching on page 63).
- After matching the incoming patient to a HealthMatics EMR patient, you can break the match, if necessary. Breaking the match affects only future results. It does not affect results already sent to the EMR (see Deleting patient matches on page 76).

Viewing results not matched to patients

NOTE: Location assignments of caregivers determine which results caregivers can view. If your user ID does not have access to **all** caregiver locations, you may not see **all** unresolved patients. Therefore, someone with access to caregiver locations must match any remaining unresolved patients

1. In the left pane of Input Manager, under *Reconciler*, select **Patient Matching**.



1. Click the **Source** down-arrow and select the results interface for which you want to match patients ***or*** select *<All Sources>*.
2. Do one of the following:
   - Select **Unmatched Patients** to view a list of results received that could not be matched to patient names within the HealthMatics EMR database.
   - Select **Matched Patients** to view a list of results that were manually matched to patient names within the HealthMatics database.

3. View the following information about unresolved patient accounts:

Field	Description
Source	Interface through which the result was received.
Patient	Last and first names of the patient associated with these patient results at the external laboratory.
External Id#	Patient's identification number at the external laboratory.
DOB, Sex, SSN	Patient's date of birth, gender, and Social Security number as recorded at the external laboratory.
Matched to EMR Patient	Name of HealthMatics EMR patient to which this result is matched.

4. Use secondary toolbar icons and fields to do the following:

Icon	Name	Action
	Delete	Delete the selected result (see Deleting patient matches on page 76).
	Patient Match Properties	View patient match properties, such as name, ID, and UPIN (see Matching results to patients on page 74).
	View Results	Preview or print details of the patient results before matching the results to a patient.
	Refresh	Refresh the list of the results in the Patient Matching window.
	Source	From the drop-down list, select to view all types of unmatched results or only those from the lab.
	Unmatched Patients	Display a list of results for unmatched patients.
	Matched Patients	Display a list of results for matched patients.

5. To preview or print the results before you match the results to a patient, on the secondary toolbar, click **View Results** (see Viewing and printing results for patient matches on page 79).

6. To match results to a patient, see Matching results to patients on page 74.

Matching results to patients

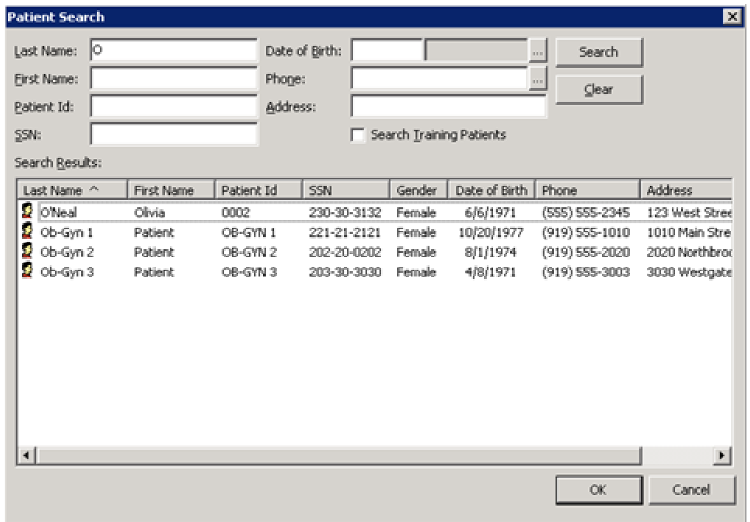
Incoming patients must be matched to patients in the HealthMatics EMR database before their results can become part of the patient charts. The procedure for processing an unresolved patient result depends upon the reason it is unresolved.

Reason for No Match	Solution
Patient record not found	Patient names from HealthMatics EMR that begin with the same letter as the last name of the patient name and the first letter of the first name selected, appear. Reconciler highlights the most likely patient match. **NOTES** • The list of patients in *Search Results* is limited by your location permissions. The patient's **Preferred Caregiver** determines if the patient appears on the list. • A patient without an assigned preferred caregiver will automatically appear in the *Search Results*. • If the patient is assigned a preferred caregiver that has the same or fewer location assignments as the caregiver viewing the list, that patient will appear on the list. • If the preferred caregiver has location assignments that the caregiver viewing the list does not have, the patient will not appear on the list. • If the HealthMatics EMR list does not include the matching patient name, return to the HealthMatics EMR (or practice management) application and add the patient to the database. Then return to Input Manager and match the results to the patient.
Multiple patient match possibilities exist	Select the matching patient from the list of possibilities.
A lab order is returned without patient results	Since this can indicate a problem with the lab interface, make a note of the lab order patient information and contact your HealthMatics EMR administrator.

NOTE: Location assignments of caregivers determine which results caregivers can view. If your user ID does not have access to **all** caregiver locations, you may not see **all** unresolved patients. Therefore, someone with access to caregiver locations must match any remaining unresolved patients

1. From the left pane of Input Manager, under *Reconciler*, select **Patient Matching**.

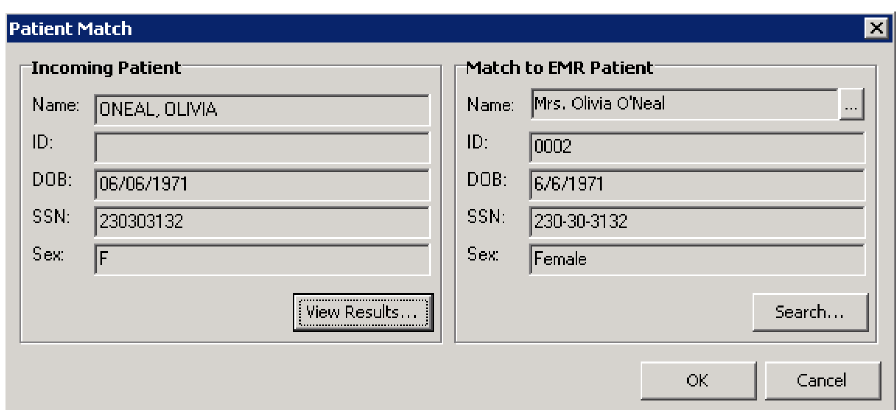
2. Double-click a result item ***or*** select it and click (Patient Match Properties) ***or*** right-click and select (Properties) to open Patient Search displaying a list of all patients whose last names are the same and/or have a matching ID.



- If the reconciler locates a name that matches the specified criteria, the Matched Patient window displays with the matched patient name highlighted.
- If no names are listed, change the spelling or other search criteria and click **Search** to bring up a new list.

  NOTE: All location assignment rules apply. If you attempt to search for a patient you know is in HealthMatics EMR, but who is assigned to a preferred caregiver who has location permissions exceeding yours, you might see a message that indicates that no patients were found in your assigned locations that matched the entered criteria.

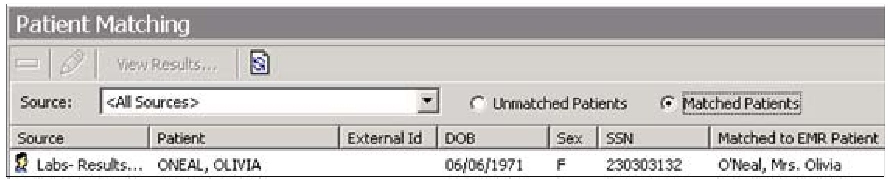
3. Select a patient to whom you want to match the results and click **OK** to display the patient match.



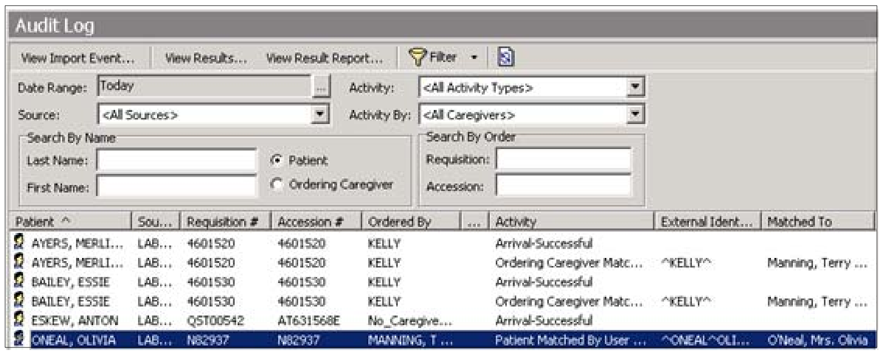
In Patient Match, the reconciler shows the incoming patient information on the left and the HealthMatics EMR patient to whom you are matching on the right. You can click **View Results** to view the result information before confirming the match.

4. To accept the match, click **OK** in Patient Match.

- To view the match, from the main Patient Matching view, select the **Matched Patients** radio button. The patient name from the EMR database displays in the *Matched to EMR Patient* column.



- The matched patient no longer appears in the *Unmatched Patients* view. The Reconciler sends all existing results to HealthMatics EMR and sends results notification messages to the appropriate caregiver, indicating new results have been received. This action displays in the Audit Log.



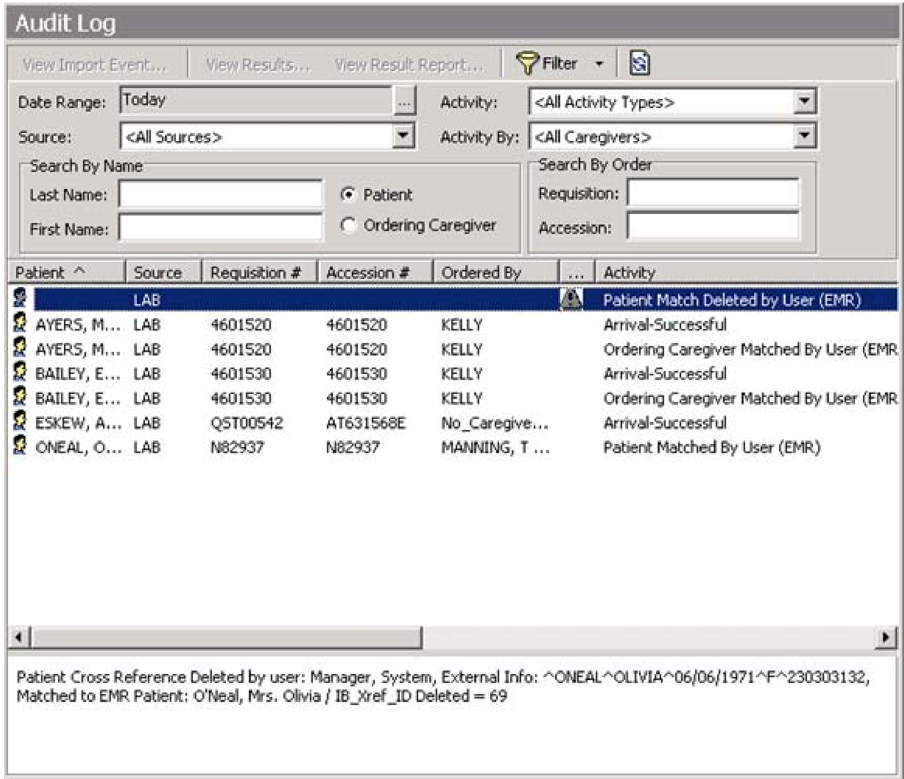
Deleting patient matches

After designating a match, you can delete the match so that you can match future results to a different patient name. This does not remove the patient or the matched results from the Reconciler or the HealthMatics EMR; it simply disassociates **future** results from the EMR patient name.

1. In the left pane of Input Manager, under *Reconciler*, select **Patient Matching.**
2. Select the **Matched Patients** radio button.
3. Select a patient name. and press **Delete** on your keyboard ***or*** click (Delete Selected Patient Match) or right-click and select (Delete), and click **Yes** to confirm.

The item no longer appears in the *Matched Patients* view and **future** results received from the external laboratory for that patient name will not be matched to the deleted matched patient.

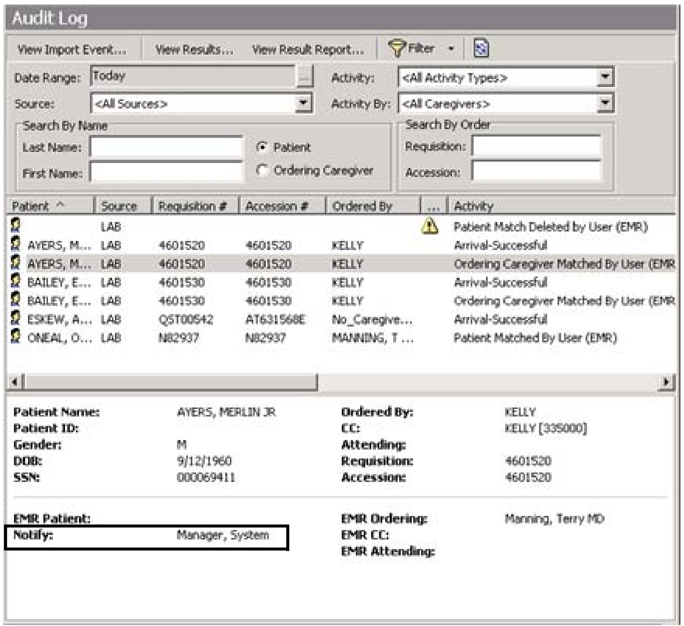
To view the action taken, from the left pane of Input Manager, select Audit Log, click the Activity down-arrow and select <All Activity Types>. Deleted matches are indicated with a .



Highlight the item to see the details in the pane at the bottom of the screen.

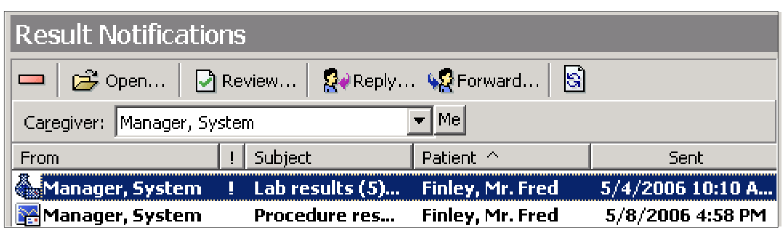
Verifying receipt of results

After all caregiver and patient matching has been completed for a result, the caregiver can readily verify that results are available in HealthMatics EMR. Only one caregiver receives a notification for results. That caregiver is indicated in **Input Manager > Audit Log** under *Notify*.



To view the result notification in the **Clinical Module**, to the following:

1. From the left pane of the HealthMatics EMR desktop or the status bar, click **Result Notifications**.



NOTE: Notifications are a convenience; they do not confirm whether results have been received.

2. If the results do not display, return to **Input Manager > Reconciler** and do **one** of the following:

   - **IF** results display in the reconciler, you received results from the external laboratory; however, the reconciler could not match the results to a patient record nor post them to HealthMatics EMR. Continue with the instructions in Caregiver Matching on page 63.

   - **IF** results display in **neither** the reconciler **nor** in the **Clinical Module**, request another download from the external laboratory after checking your modem and connections if you use a dialer interface. Check your services if you use an HL7 Receiver Interface.

If the reconciler is empty after the download process finishes, click to refresh and verify all results were successfully matched and sent to HealthMatics EMR. Unmatched results from the download process display in the reconciler for review.

Viewing and printing results for patient matches

The process for viewing and printing results for patient matches is the same as it is for caregiver matches (see Viewing and printing result reports from reconciler on page 67).

Deleting results not matched to patients

If you cannot match results to patients, you might want to delete the results and notify the lab. After results are deleted, you can delete patients.

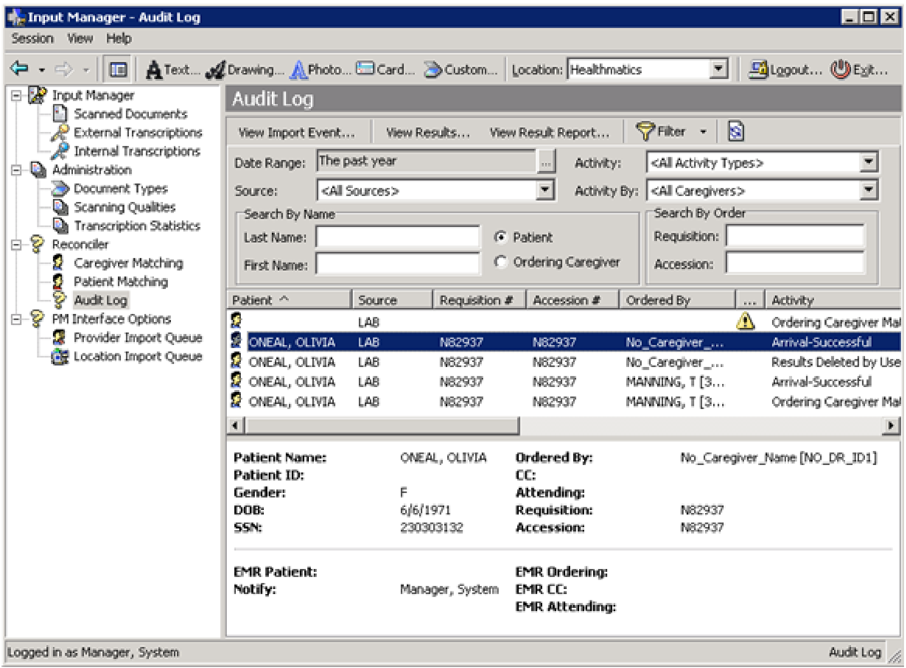
1. In the left pane of Input manager, under *Reconciler*, select **Patient Matching**.
2. Select a patient name and click **View Results**.
3. In View Results, do one of the following:
   - To delete a specific result, select it and click (Delete Selected Result) and **Yes** to confirm.
   - To delete all results for this patient, select the patient's name and click (Delete Selected Result) and **Yes** to confirm.
   - Click **OK** to close View Results.
4. If all results were deleted, in the Patient Matching view, select the patient name and click and **Yes** to confirm.

Audit Log

The *Audit Log* displays information about the receipt, reconciliation and notification of processed result messages coming into the EMR from external sources. You can see when a message was received, who performed any reconciling (that is, who matched a caregiver or patient) and when the result notification was sent to the EMR.

In the *Audit Log*, you can review entries produced during the dial-in transfer and parsing of lab data, and also logs of any HealthMatics EMR program installed at your practice.

1. In the left pane of Input manager, under *Reconciler*, select **Audit Log**.

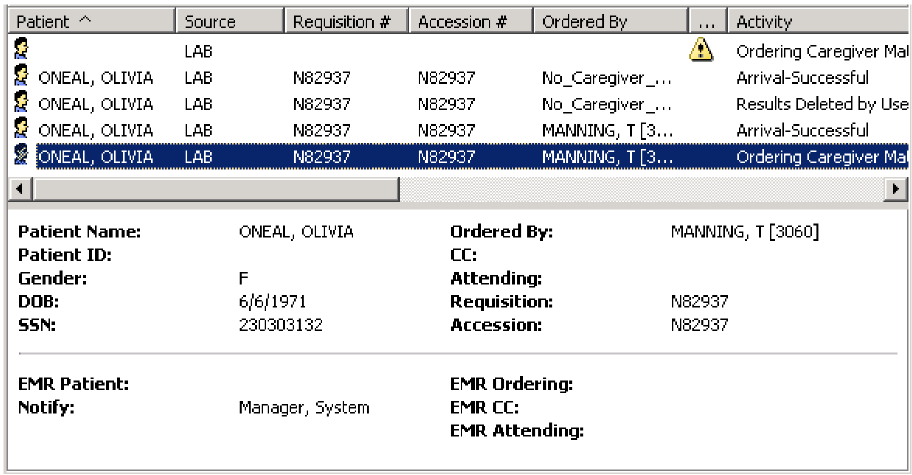


2. Click  to select a quick filter (see *Quick Filters* in the ***Application Reference*** manual) or use any of the following filter to locate the log information you want to view:

Filter	Action
Date Range	Filter log entries by date.
Source	• **<All Sources>** - Displays log entries from all result interfaces ***or*** • Select a specific results interface to view log entries.
Activity	Filter log entries by activity type. **Examples:** *Patients Matched* or *Caregiver Match Reassigned*
Activity By	Filter log entries by user who conducted the activity.

Filter	Action
Search by Name	Filter log entries by patient or ordering caregiver. Click either **Patient** or **Ordering Caregiver** and enter the last, and optionally, the first name.
Search by Order	Filter log entries by entering a **Requisition** number or an **Accession** number.

3. To view the activity during the date range, based on the filters you specified, highlight an entry to see the details in the preview pane.

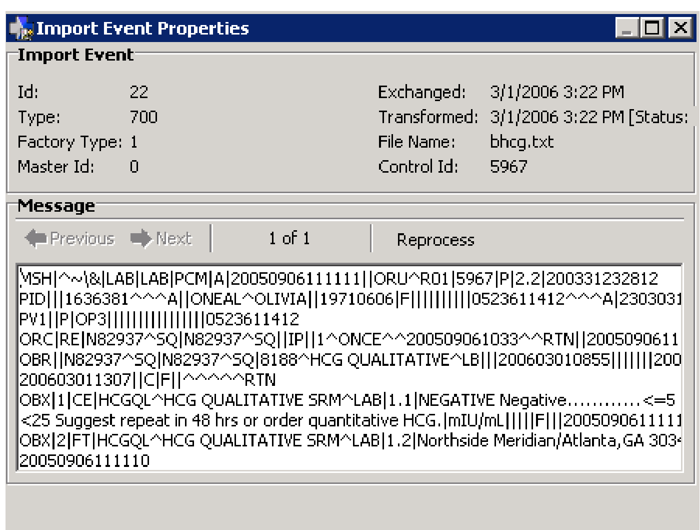


4. To view results for the selected record, click **View Results**.

5. To preview or print results for the selected record, click **View Result Report**.

   NOTE: The process for viewing and printing results reports are the same as in the Caregiver Matching (see Viewing and printing result reports from reconciler on page 67).

6. To view the HL7 code for the event in a text file, click **View Import Event**.



HealthMatics EMR Lab Considerations

Consider the following when using HealthMatics EMR with Reconciler:

- **Electronic receipt of results** - HealthMatics EMR can receive patient results electronically over the interface **IF** Input Manager and Reconciler are also installed.
- **Modification of electronic results** - You **cannot** modify electronically received patient results in either *Lab Results* in HealthMatics EMR, but you **can** modify results that you enter manually into HealthMatics EMR.
- **Accession numbers** - A lab vendor-assigned accession number displays in the Lab Results view in HealthMatics EMR when a lab order is highlighted.
- **Ordering through HealthMatics EMR** - HealthMatics EMR recommends that you order tests through HealthMatics EMR to document the order in the patient chart and to ensure accurate billing. However, the order is not sent electronically to the lab vendor and the results received back from the lab vendor do not get matched to these orders.
- **Result notification messages returned to ordering caregivers** - *Result Notification* messages typically are returned to the ordering caregiver recorded on the lab request form. Specific settings for each practice are defined during interface setup.
- **Messages to HealthMatics EMR** - Reconciler sends one message per patient to the ordering physician’s desktop. When new patient results are sent to HealthMatics EMR and the physician already has a message about the particular patient, no additional message is entered.

7. PM Interface Options

Practice Management interfaces provide the following two import queues for HealthMatics EMR:

- **Provider import queue** - Use this queue to review and match imported caregivers to HealthMatics EMR caregivers (see Provider Import Queue on page 83).
- **Location import queue** - Use this queue to review and match imported caregiver locations (see Location Import Queue on page 86).

Provider Import Queue

Most practices use a Practice Management (PM) system to store demographic information about providers or caregivers. You can import this information into HealthMatics EMR through an interface between the two products. Some practice management systems allow multiple accounts for a single caregiver, but it is important that caregiver information not be duplicated in HealthMatics EMR.

Use the *Provider Import Queue* in Input Manager to review and approve new and modified caregiver information in the following situations:

- Before the first-time use of the HealthMatics EMR application and HealthMatics PM Interface
- When you add a new caregiver to the practice management system
- If you encounter problems importing caregiver schedules to HealthMatics EMR
- Periodically, to check to see that there are no new caregivers in the queue
- When the PM system displays error messages that indicate queued caregiver information does not match (or map to) a HealthMatics EMR caregiver

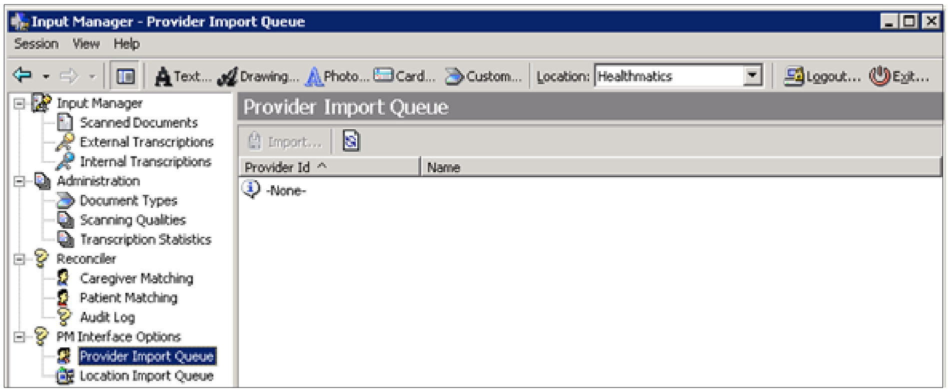
Schedules, including appointments, do not display in HealthMatics EMR for unmatched caregivers. A PM caregiver must be matched to a HealthMatics EMR caregiver.

CAUTION!

Caregiver name and UPIN information sent through the PM Interface overwrites existing caregiver demographic information in HealthMatics EMR. If your practice uses a PM system, always change caregiver UPINs and provider names in the PM system, rather than in HealthMatics EMR. Caregiver UPIN and provider name information from the PM system **always overwrites** HealthMatics EMR data.

NOTE: After you match a PM caregiver to a HealthMatics EMR caregiver, you cannot change the mapping. Contact Support if you need assistance.

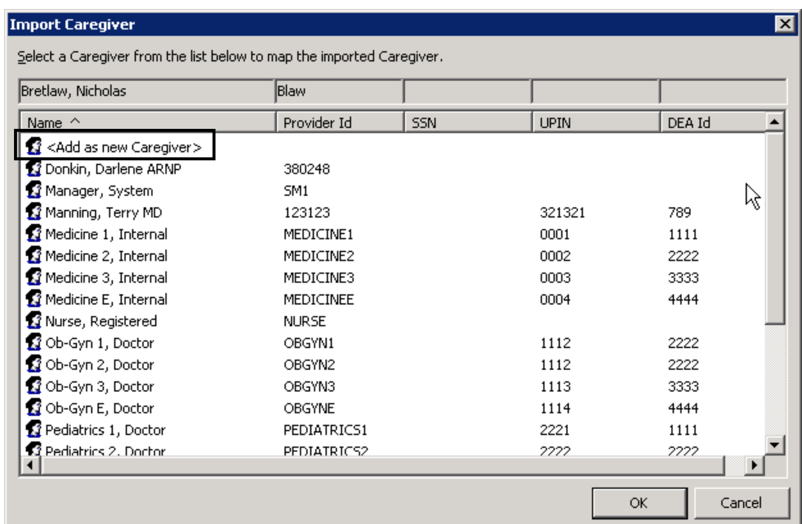
1. From the left pane of Input Manager, under *PM Interface Options*, select **Provider Import Queue**.



The Provider Import Queue displays PMS caregiver names not yet matched to a HealthMatics EMR caregiver.

CAUTION! If your practice uses multiple databases that include any of the same caregivers, caregiver information imported from one database overwrites the existing caregiver information in HealthMatics EMR. All databases should use the same demographic and license information for these duplicate caregivers.

2. In the right pane, select the PM caregiver that you want to match to an EMR caregiver and click **Import** to display a list of EMR caregivers



NOTE: To sort the list differently, click any of the column headers.

3. To match the caregiver, do **one** of the following:

   - **IF** you select an existing caregiver from the list to map to, click **OK** to continue and **Yes** to confirm to return to the *Provider Import Queue*.
   - **IF** the caregiver has never been imported to HealthMatics EMR, select **<Add as New Caregiver>** (entry at the top of the *Name* column) and click **OK** to display Caregiver Properties.

     > In Caregiver Properties, do the following:

- Enter caregiver information on the **Identification** tab.
- Click the **Address** tab to enter address information.

  Refer to *Caregiver Properties* in the ***Administration Module*** manual for detailed instructions.
- Click **OK** to display Caregiver Locations.

> In Caregiver Locations, select one or more locations to which this caregiver should have access and click **OK.**

Refer to *Caregiver Locations* in the ***Administration Module*** manual for detailed instructions.

Location Import Queue

If you purchased the HealthMatics Ntierprise practice management system, the *Location Import Queue* provides the ability to decide what to do with locations imported from that system into HealthMatics. You can map imported locations to a location already defined in HealthMatics EMR or designate it as a new EMR location.

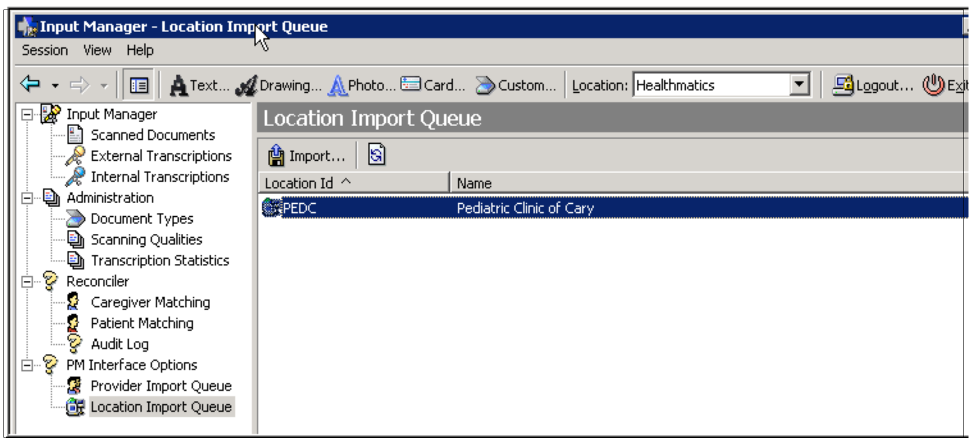
The *Location Import Queue* functions similarly to the *Provider Import Queue* (see Provider Import Queue on page 83).

Use the *Location Import Queue* to review and approve new and modified location information in the following situations:

- Before the first-time use of HealthMatics EMR and HealthMatics PM Interface
- When you add a new location to the practice management system
- When the PM system displays error messages that indicate queued location information does not match (or map to) a HealthMatics EMR location.

To map imported locations, follow the steps below:

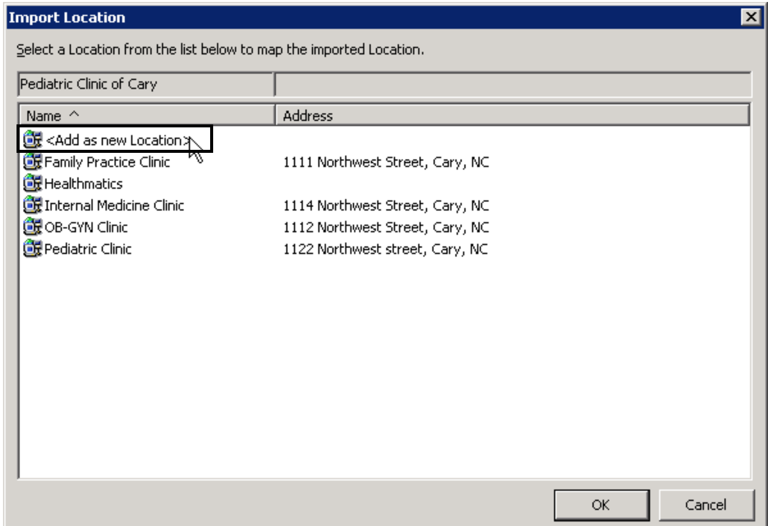
1. From the left pane of Input Manager under *PM Interface Options,* select **Location Import Queue**.



   Locations set up in your PM system that are available for importing display to the right. If there are no items to import, *None* displays and **Import** is disabled.

2. Select a PM location and click **Import** ***or*** double-click the item to display Import Location.

   NOTE: The PM location name and contact that you select appear near the top of the dialog box. You can map the PM location to an existing location in HealthMatics EMR or to a new HealthMatics EMR location that you create.



3. Map the PM location by doing **one** of the following:

   - To map the PM location to an existing EMR location, select an EMR location from the list and click **OK** and **Yes** to confirm.

   - To map the PMS location to a new EMR location, select **<Add as new Location>** (at the top of the *Name* column) and click **OK** to display Location Properties (refer to *Location Properties* in the ***Administration Module*** manual for detailed instructions).

     > Enter new location information on the Settings tab.

     > Click the **Address** tab to enter address information.

     > Click **OK** to map the PM location to the new EMR location that you created.

NOTES

- The mapped location no longer displays in the Location Import Queue.
- After you match a PM location to a HealthMatics EMR location, you cannot change the mapping. Contact Support if you need assistance.

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