# Scanning Patient Records with PaRIS

Setting up the ScanSnap IX500

First, install the ScanSnap software that comes with the scanner. This should be on a CD. The CD has a several different programs. You only need the "ScanSnap Manager". Note that it seems important that you NOT connect the scanner to the laptop (USB) until the software is installed. Follow the directions.

It installs a background task that is always running and waiting for the scanner to start working.

## Scanner Software Configuration

Once installed there will be a new icon in your tasks. The circle with the S in it is the ScanSnap software. If it is GRAY then the scanner is not active.
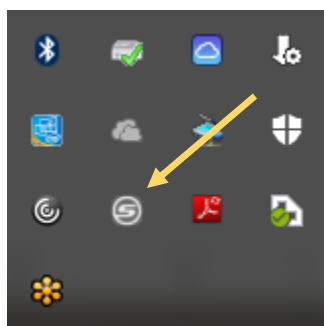
If the scanner is installed correctly and plugged into the laptop (USB) then when you press the SCAN button on the scanner (when the circle S is GRAY) then the following message will pop up and the scan light on the ScanSnap will light up blue.
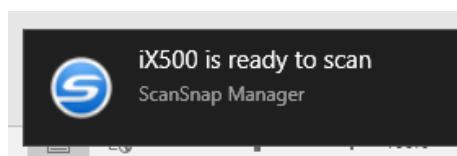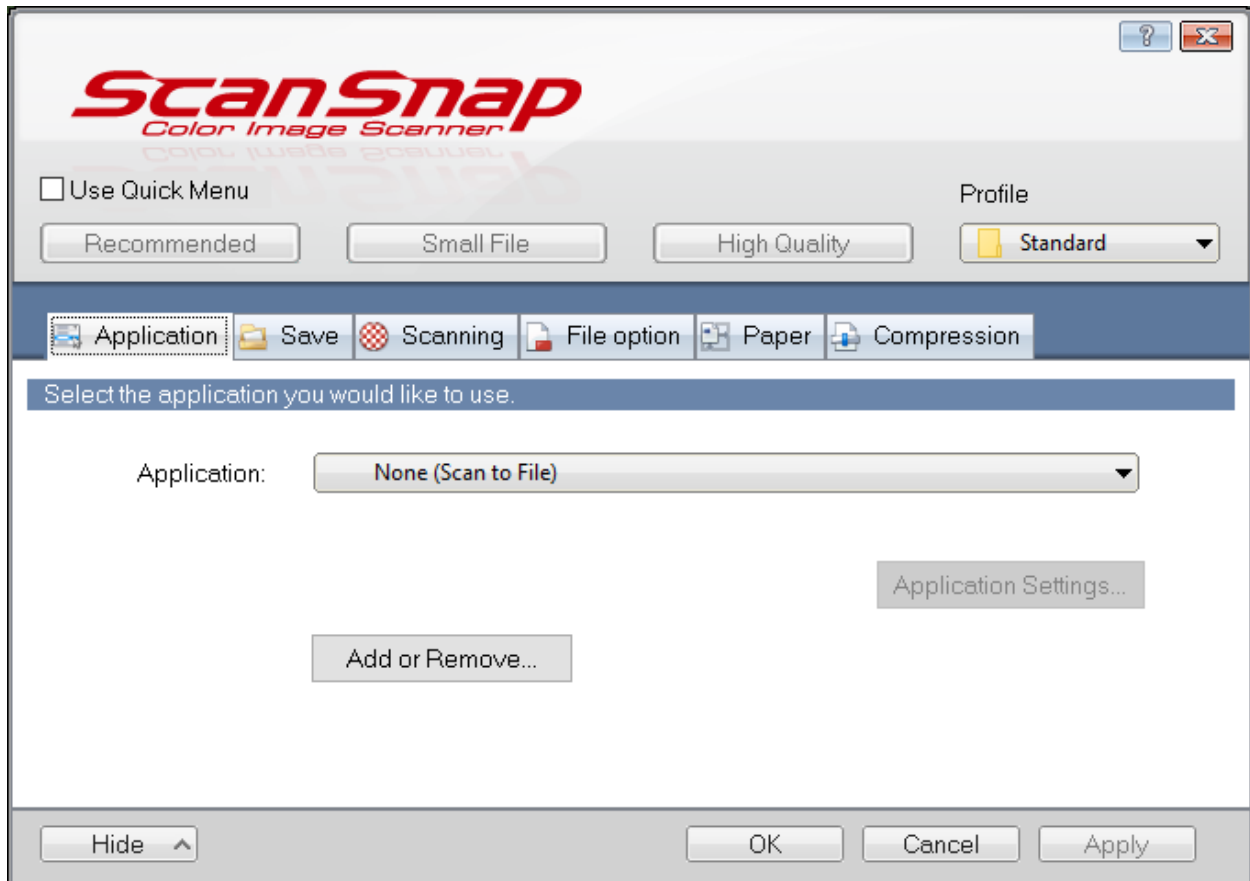

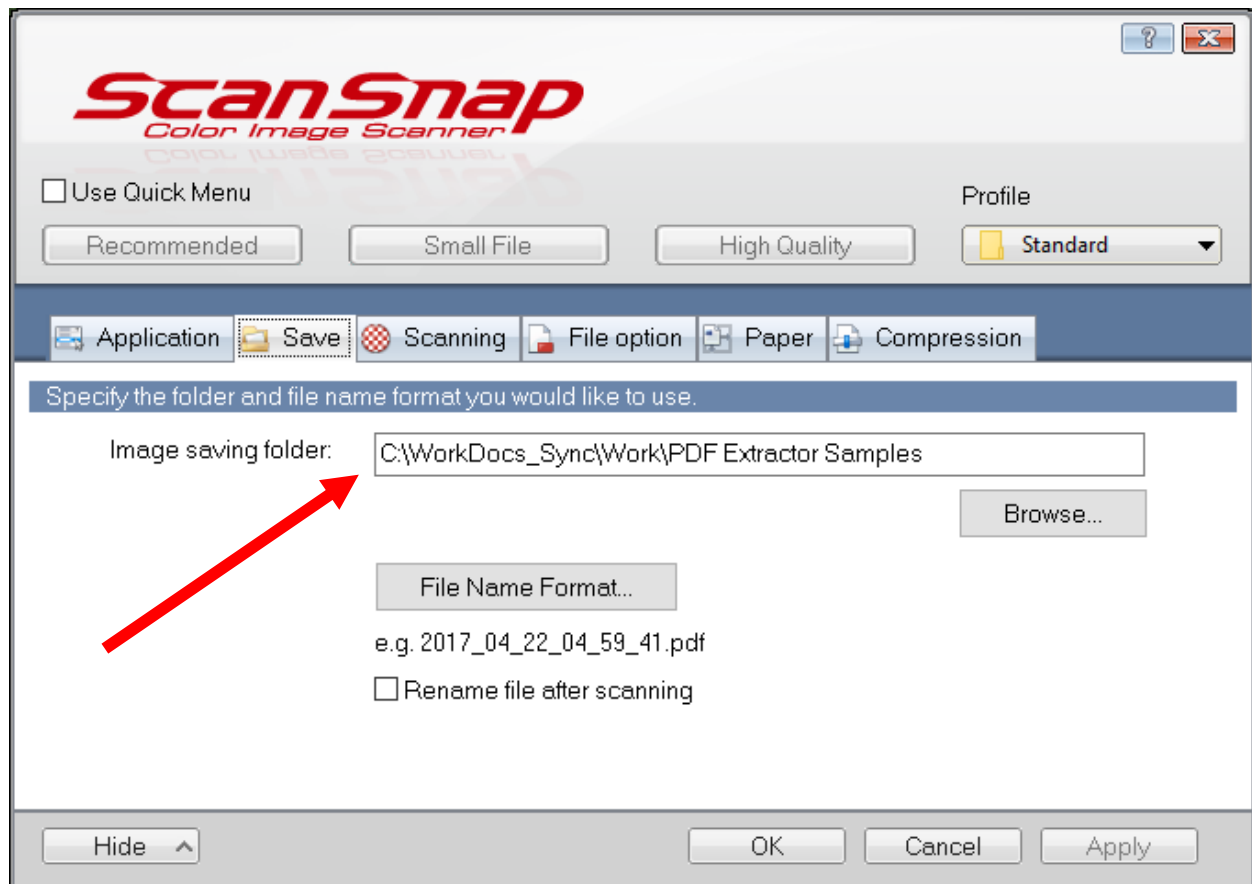Right click on the new BLUE circle S icon in the task bar icons.
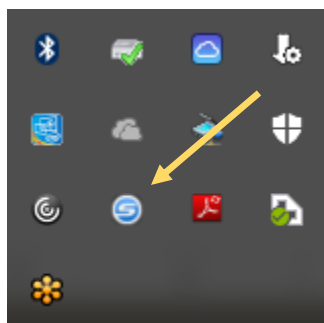
After right clicking, you will see a menu of options. Select <mark>Scan Button Settings</mark>

Go through each tab and select the following options.

APPLICATION TAB

SAVE TAB

Select a directory on the laptop. It can be a different directory each clinic or each day or just use the same one.

The thing to keep in mind is that you are going to scan the documents to your hard drive first then upload them. So you will need to keep track of which you have uploaded to PaRIS and not upload them a second time.

Note: You will be scanning one patient at a time. If a patient has three forms (dental form, prescription, and x-ray) then put them in the scanner together and press scan. If you have many patient forms ready to scan then each patient's forms are scanned to a separate file.

SCANNING TAB -- <mark>Note we need *color compression*</mark>
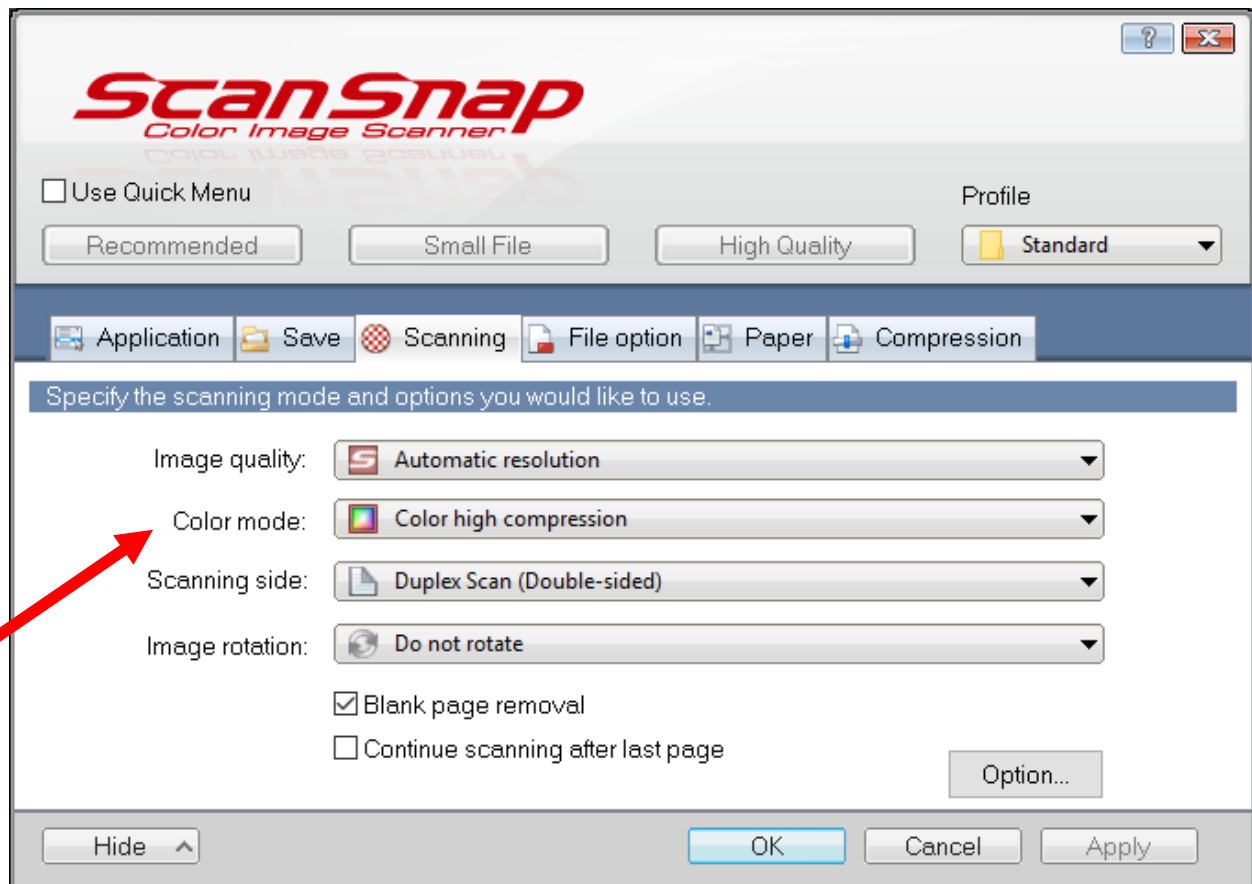

We do want to scan both sides of the forms. Some pages or xrays or prescriptions do not have a back side and the scanner will detect that.

<mark>Color mode: Color high compression</mark>

> Since we are often scanning color forms they generate a lot of unnecessary data because of the color background. With the *Color high compression* turned on you will still get the color of the form but the data will be greatly compressed. This will help reduce the network load at your clinic when you are uploading documents and viewing them.
>
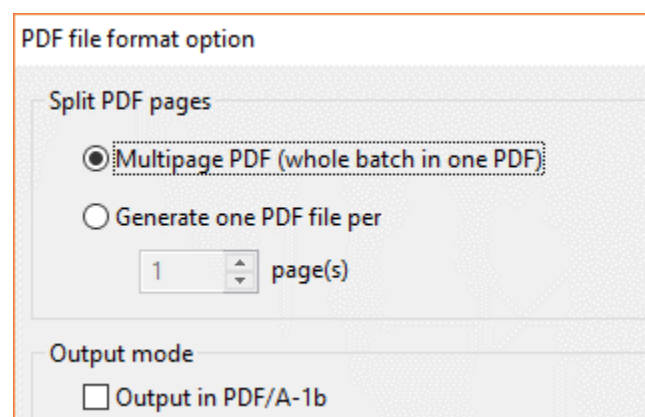> This is a very important setting!

FILE OPTION
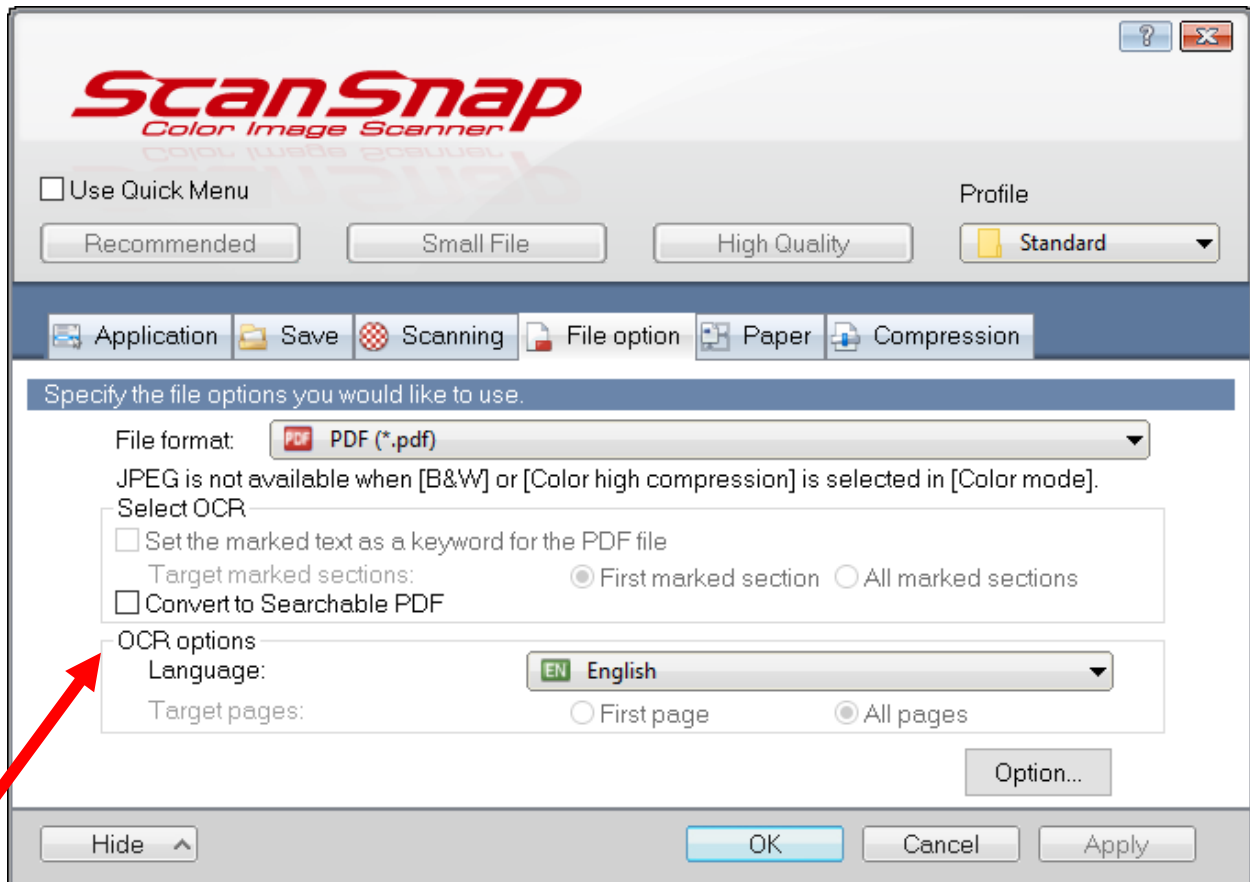
Set the file format to   PDF

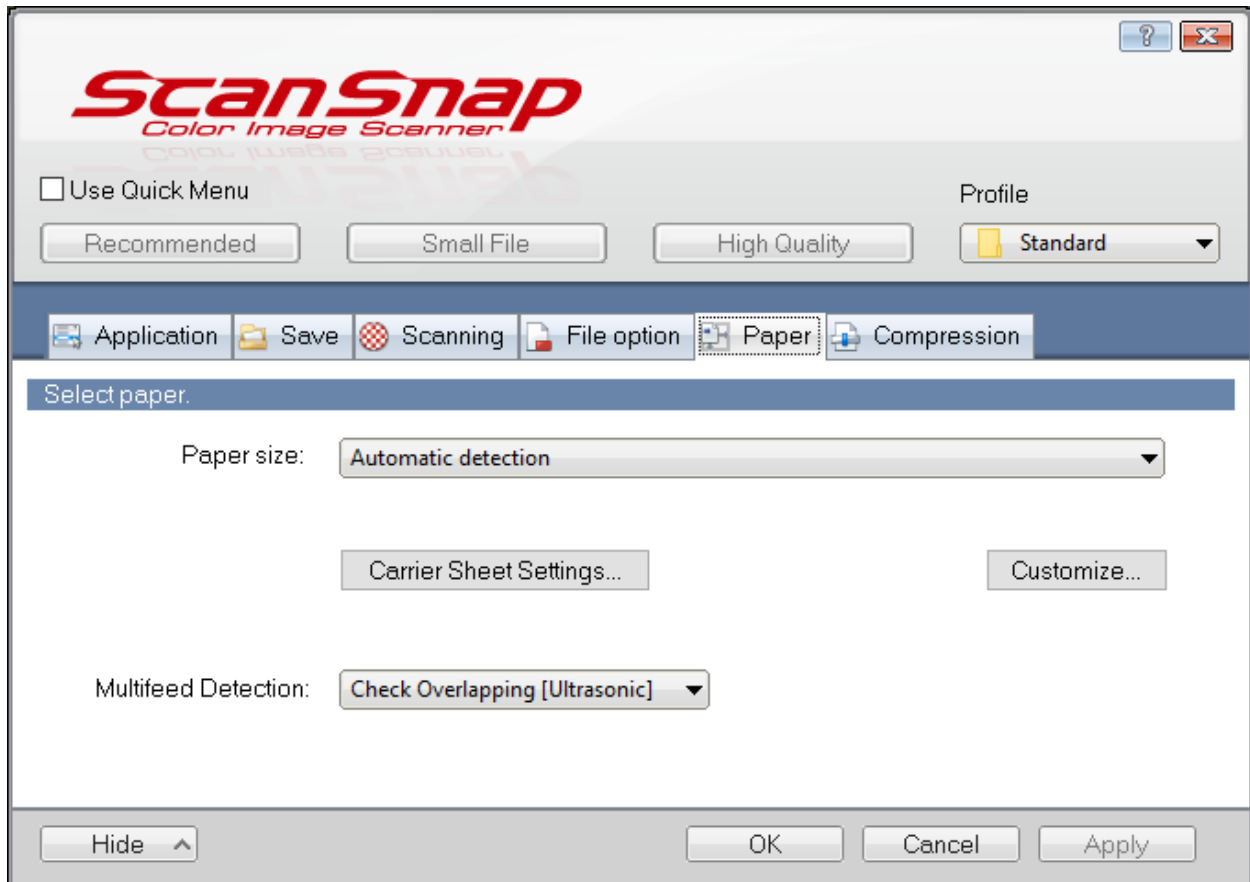<mark>Do not check</mark>   CONVERT TO SEARCHABLE PDF. Let the server do the OCR process.

Click the [Option] button

On the OPTION dialog it is important that you set things to a multipage PDF like is shown here.
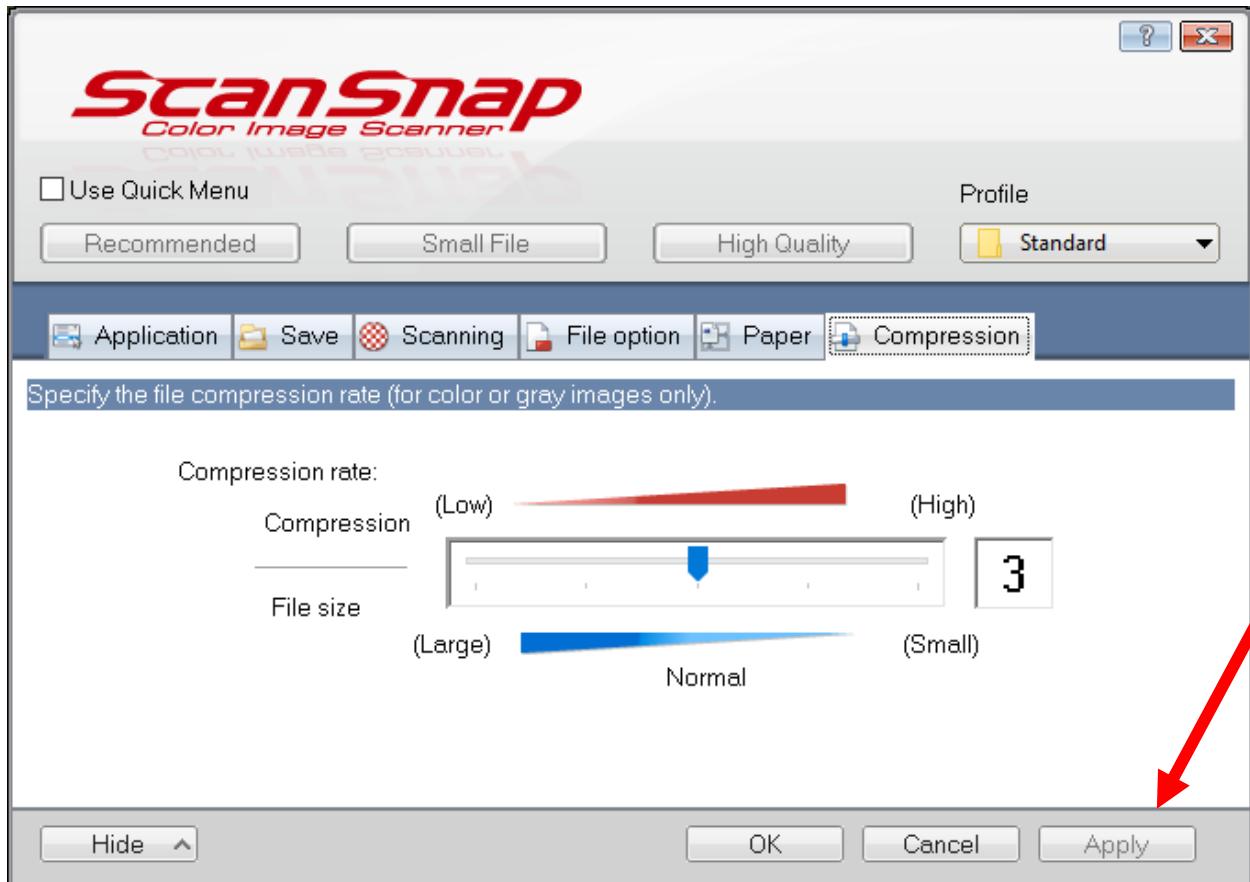
PAPER TAB

Let the scanner determine the size of the page. You may have smaller forms.

COMPRESSION TAB

Click the APPLY button to save the settings.

Now scan about 50 documents then use PaRIS to upload them into your clinic.

Process:

1. Scan about 25 to 50 documents.
2. Upload them into PaRIS
3. Scan 25 to 50 more documents.
4. Upload them into PaRIS
5. Scan 25 to 50 more documents.
6. Upload them into PaRIS

SCANNING DOCUMENTS INTO PaRIS

You will be scanning documents one patient at a time. Therefore, if you just have a dental form put that in the scanner by itself and press the blue glowing scanner button. When it is finished put in the next patient's form and press the scanner button.

XRAYS and Prescriptions

If you have a patient form with xrays attached or other paper then put them into the scanner at the same time. It creates a single PDF file so they are loaded together.

NOTE: The PaRIS software will automatically read the Patient Label to determine the correct patient. It will connect that form image to the correct patient. In order to do this the patient label must be in good shape and put on the form reasonably straight.

Open PaRIS and make sure you are connected to the correct clinic.

Select the DATA menu

Select   PAPER RECORD MANAGEMENT
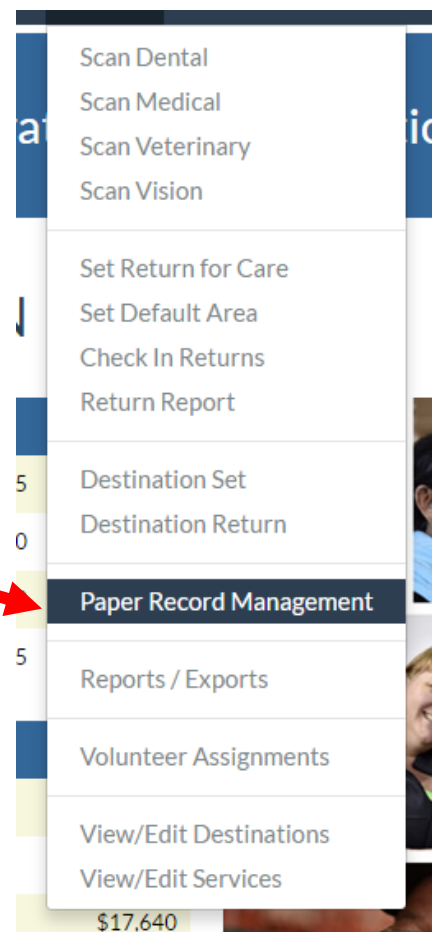
To import documents click the CHOOSE FILES

Then select 25 to75 documents which have not yet been uploaded.

Press the blue button [upload]

The upload time depends on the clinic's network. If you have a fast network then it is fast.

If you have a slow network you may want to experiment with uploading fewer files at a time.

You will see the files listed next to the blue button that were uploaded.

PROCESSED

You will see that initially the files in each "batch" are not yet processed. This is because the processing is done on the server in the background. This processing task is running constantly on the server and should process the file within 5 minutes.
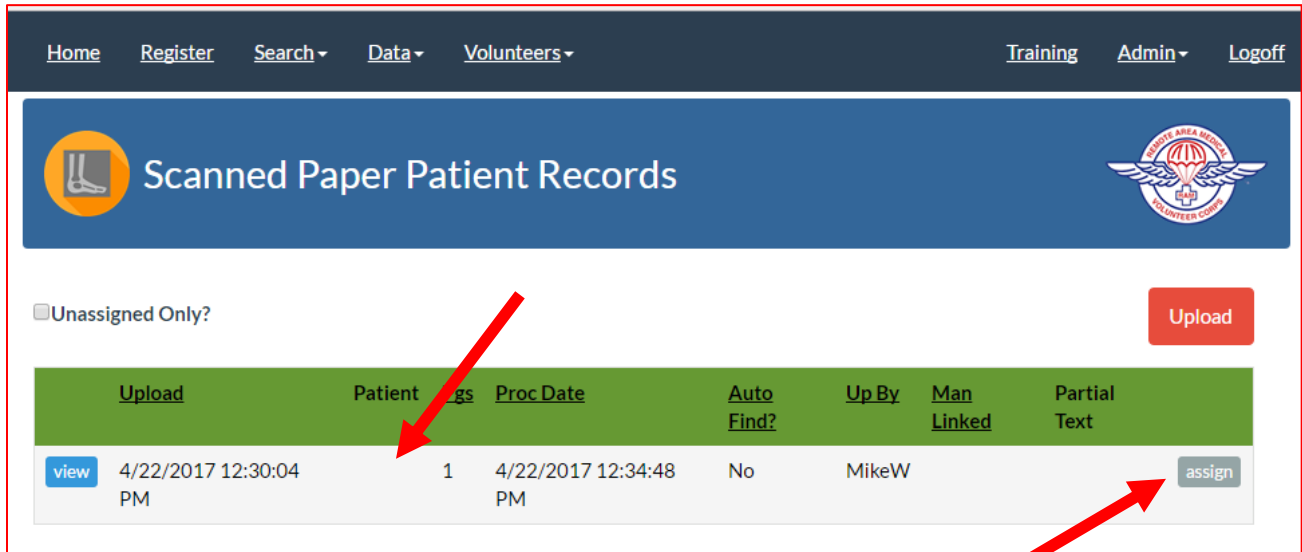
Once the files have been processed you will see the number go up.

AUTOMATIC CONNECTION TO THE PATIENT

If you have a good patient label the system should automatically connect the form to the patient. If it doesn't (no label or damaged label) then click the gray [VIEW] button to view the batch.

Above is the display of the "batch" of documents loaded together. In this example there is only one document. You can see the PATIENT name is blank.

When you see this click the gray [ASSIGN] button next to the document.

ASSIGNING DOCUMENT TO PATIENT
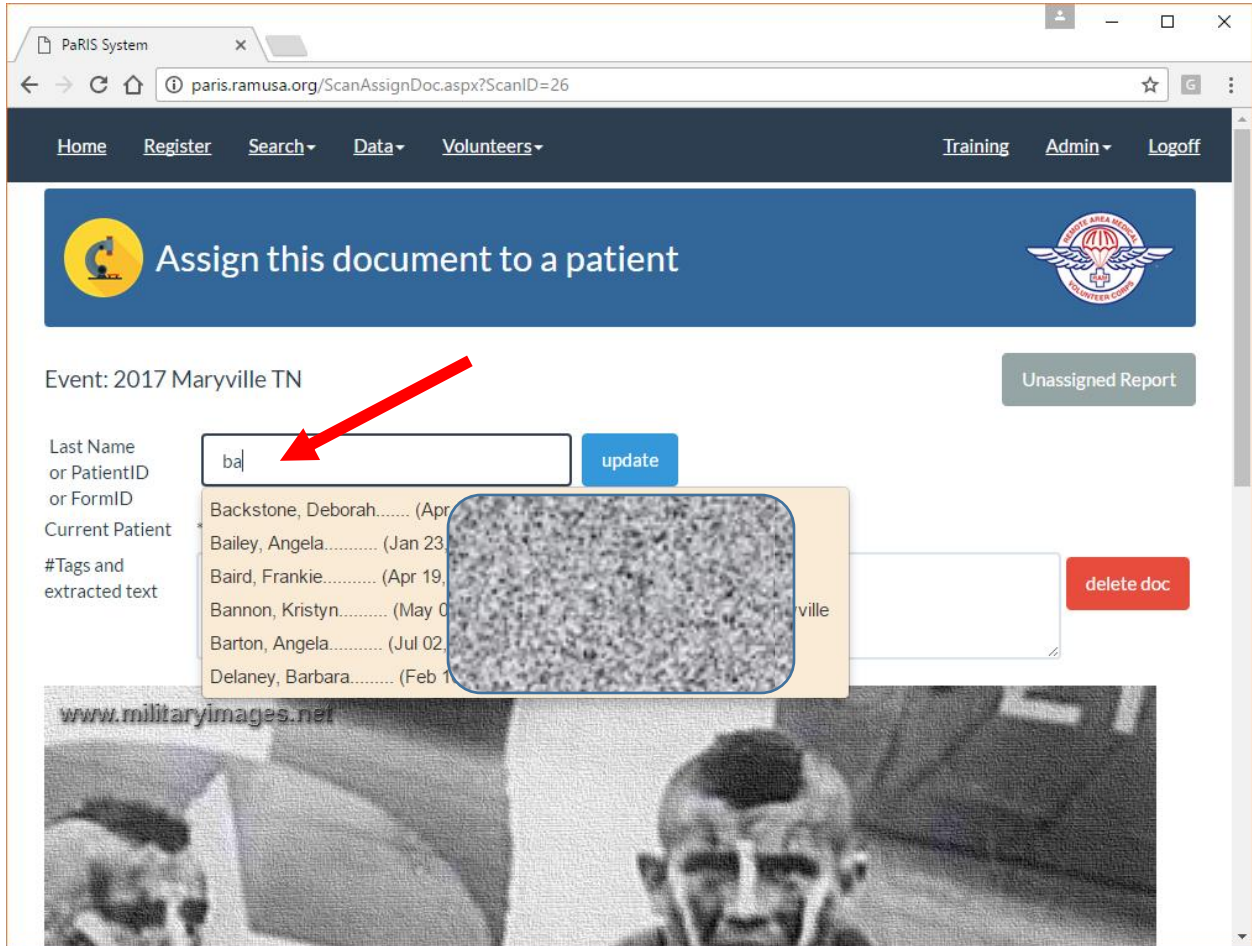
You can see the uploaded document. Type in the last name of the patient and select their name in the list. It will be displaying the list of patients from the clinic.

Arrow down and press enter on the patient name when it is highlighted.

That document is now connected to that patient.
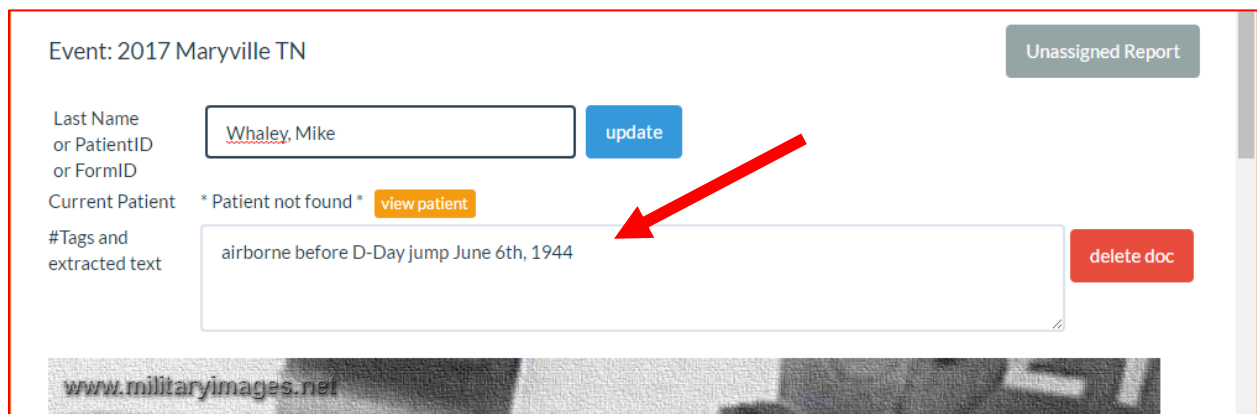
USING HASH TAGS TO HELP IDENTIFY DOCUMENTS

You can add keywords, or hashtags, to your forms and they are picked up automatically by the PaRIS software to help identify your forms.

A hashtag might be   #dental   #prescription   #xray

These hashtags will be extracted from the scanned form data and placed at the front of the scanned text. This shows up when a summary of the patient documents is displayed with a patient to help identify the type of document.

Hashtags may only be in the following two areas of a page:

1. The upper left hand corner of page. An area 4" wide and 5" from the top.
2. Optionally (setup by customer) an area at the lower left that is 4" wide and 1" from the bottom.
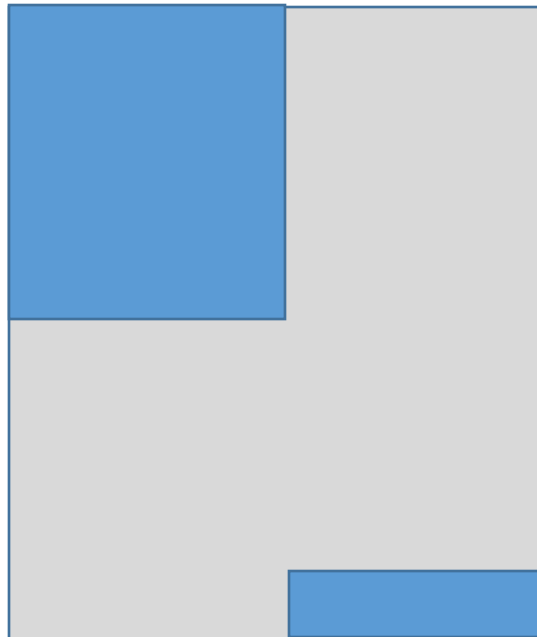
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