PaRIS System Manual

PaRIS: Patient Registration and Information System – manual revised April 11, 2024

The PaRIS system is a simple to use, secure, and flexible cloud-based patient management system for use by free medical clinics.

Photos by © Auston James

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SYSTEM OVERVIEW

The PaRIS system provides the following functionality.

1. The system allows lightly trained volunteers to register patients into the system quickly.
    a. The system allows the capture any number of patient questions during the registration process. Your organization defines these questions and designs the patient registration page used by your volunteers.
2. The system allows you to define and then capture the information you need about the services you provide each patient. This can include counts of services as well as things like blood pressure, medical history, medications taken, and family history. You define and configure the information you need to capture. You also set the "value" of these services allowing real time numbers for service values during your clinics and later for reports to donors and the media.
3. The system allows you to capture all the paper records generated with patient visits. This records management process is very quick, simple, and easy to use. It can be operated by lightly trained volunteers and will automatically connect paper records of all kinds to the correct patient. Capturing paper records will just take seconds per patient. No time consuming and error prone document upload procedure is necessary.
4. The system will automatically identify the types of paper records being uploaded into the system. Document identification rules may be setup which allow your volunteers to simply upload scanned paper files with no other input. PaRIS automatically identifies the not only the patient for the uploaded files but the types of forms being uploaded.
5. The system allows real time access to information on services being provided using reports available on smartphones.
6. Being cloud based, the security and reliability, the system maintenance, and system upgrades are all handled by Spark. There are no on-site servers to support. All you need are simple PCs and internet access.

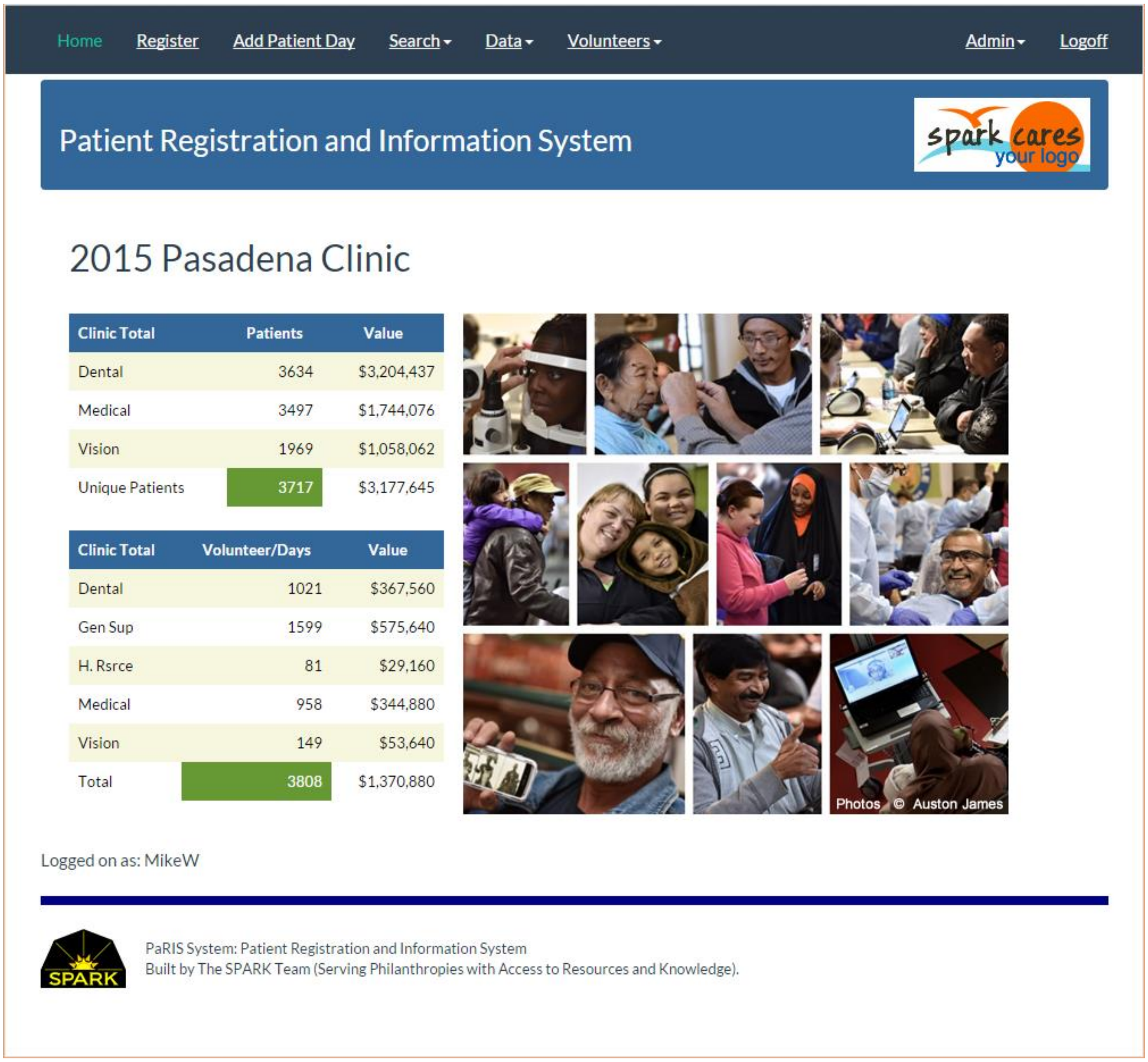
RECENT UPDATES

October 2020	• Added the ability to have checkboxes in the patient profile waiver document.
July 2020	• Added the software to allow patients to create a patient profile on their own mobile device to speed up patient registration. This is intended to help with COVID-19 social distancing. See this new feature in the section Patient's Registering themselves with mobile devices on page 85. • The patient profile system also allows them to sign their patient waiver / consent for care on their mobile devices before they arrive at the clinic. This may also speed up the registration process and facilitate social distancing.
April 2020	• Patient records may now require a patient phone and address. This is a setting in the definition of each clinic/event record.
December 2019	• Added the ability to import basic patient records from spreadsheets.
November 2019	• A major upgrade of the paper document management system. The text recognition software has been greatly enhanced so the patient matching is even more reliable than before. And a new forms recognition function has been added so the system not only identifies the patient but the types of forms being uploaded as well.
May 2019	• Added a password recovery option for PaRIS administrators. • Updated patient data access logging for displaying patient medical records, data exports, reports, and all views of patient paper records. This allows the monitoring of who and when patient information is accessed. • The export and reporting software has been updated. Exported files are now named better, including the clinic name and date/time of the export, to make it easier to keep track of the files. The reporting feature now includes options for selecting additional report parameters on some of the reports.
March 2019	• Added the ability to select your own printed patient label type to print when registering patients or entering patient services. • Allowed you to define your own training "clinic". Training clinics can fill up with TEST TEST and dummy records and during training there are too many matches.
February 2019	• Allowed the uploading of patient documents directly into a patient's record, bypassing the automatic merging for paper documents without PaRIS labels. • Added a new PaRIS label format, the triage label. This contains the general medical conditions. • Added new service data entry formats. The checkbox, long text field, and short text field.


DENTAL
START
WAITING AREA

HOME SCREEN

The home screen, and all the pages, use a menu system which makes it easy to get around quickly. There is still strict security giving front end volunteers just helping with registration very limited access but admins and data entry people can get around with little training. Registration-only volunteers can't see some of the menu items and can't see patient services. This is the same as in your current version.



Home Register Add Patient Day Search Data Volunteers Admin Logoff

Patient Registration and Information System

spark cares your logo

2015 Pasadena Clinic

Clinic Total	Patients	Value
Dental	3634	$3,204,437
Medical	3497	$1,744,076
Vision	1969	$1,058,062
Unique Patients	3717	$3,177,645

Clinic Total	Volunteer/Days	Value
Dental	1021	$367,560
Gen Sup	1599	$575,640
H. Rsrce	81	$29,160
Medical	958	$344,880
Vision	149	$53,640
Total	3808	$1,370,880

Photos © Auston James

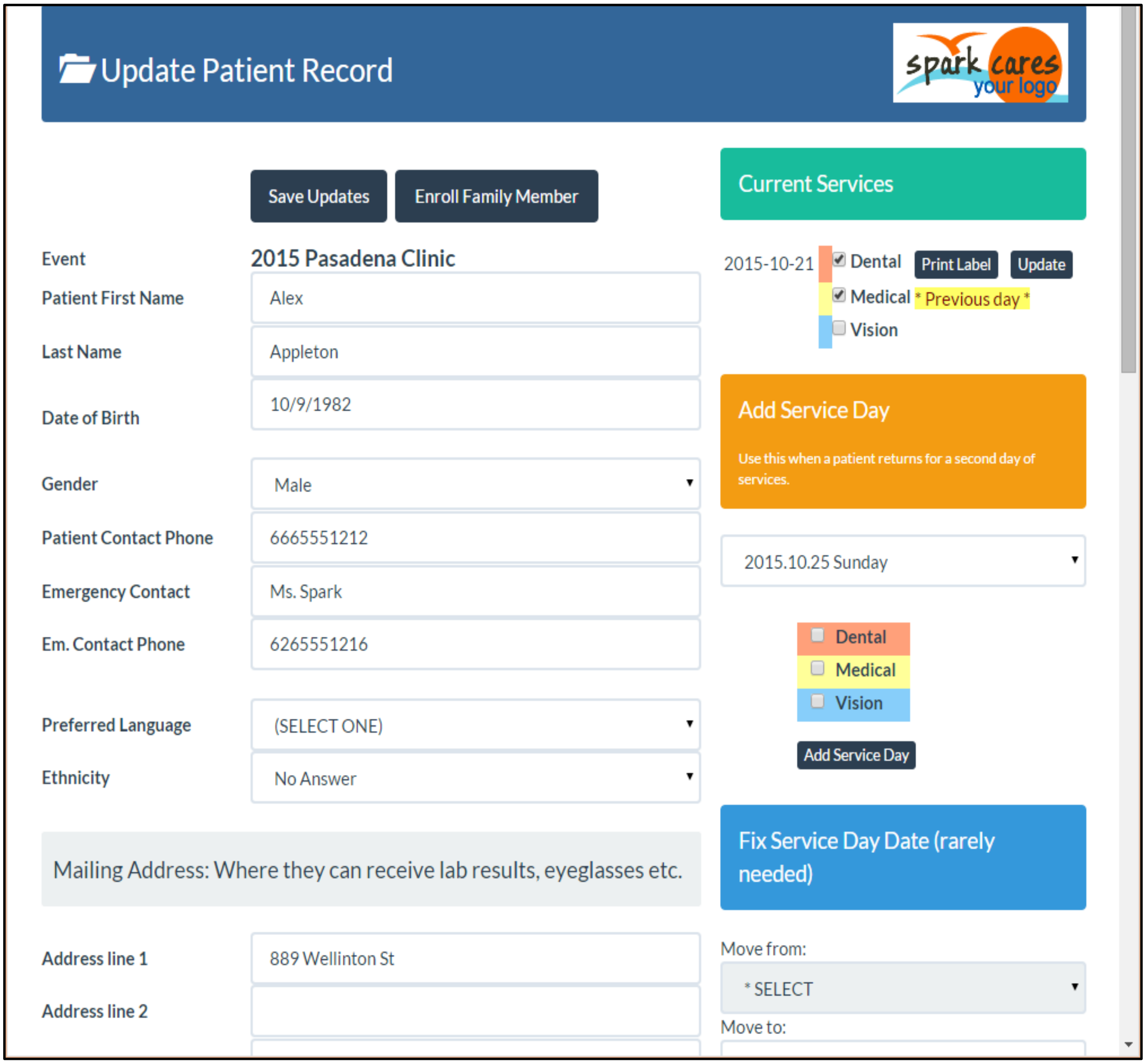
Logged on as: MikeW

SPARK

PaRIS System: Patient Registration and Information System
Built by The SPARK Team (Serving Philanthropies with Access to Resources and Knowledge).

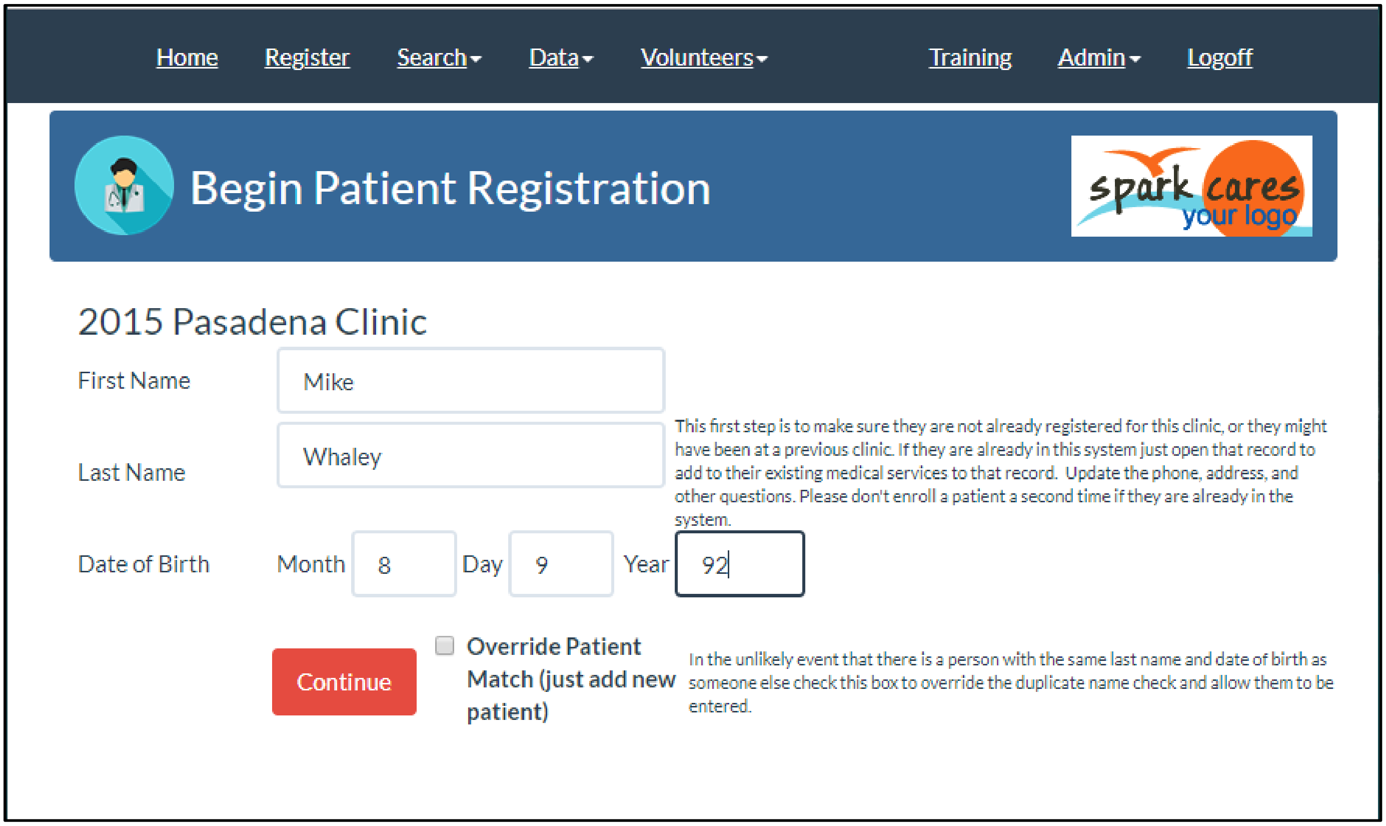
PATIENT REGISTRATION PROCESS

The patient registration process is flexible, to allow the capture of the information your organization needs, while being simple to use. The goal of the system design is that untrained volunteers can sit down and be productive. The registration process can be customized so that each clinic captures just the information you need for that clinic. Different clinics may need a different set of questions.

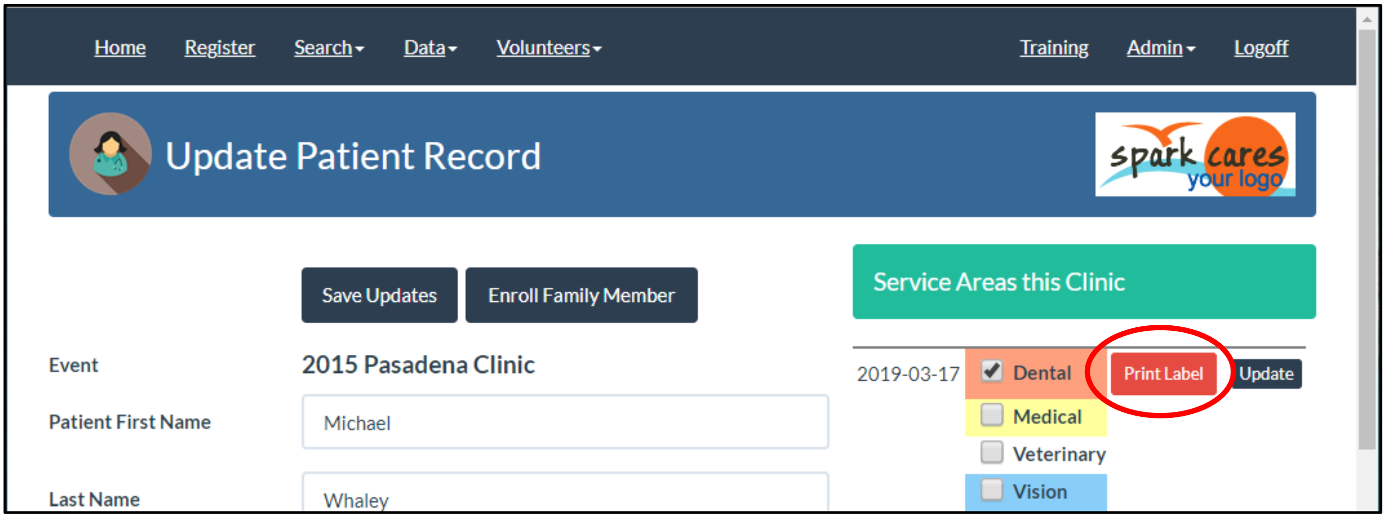


REGISTERING A PATIENT

To begin patient registration your volunteers click on the REGISTER button in the menu at the top of the page. They enter the patient's first and last name and their date of birth. The system then scans the database to see if the patient has already been entered into the data. If the patient is already there it shows a question to make sure it is the same person. Otherwise it opens the registration page for you to answer the questions you have defined.

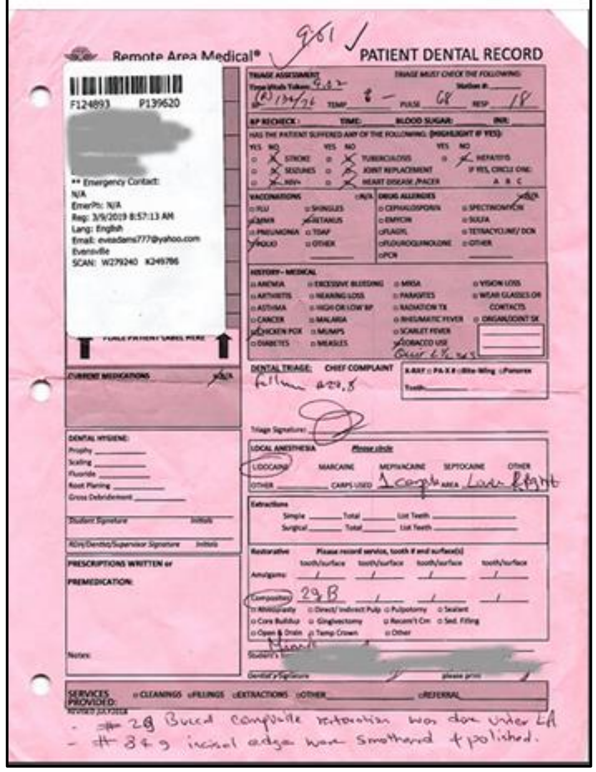


Once you save the patient's information for their registration you will click on the red [Print Label] button shown below to print the standard patient label. This is then stuck onto the patient form. See the section on patient labels.



WHAT PAPER MEDICAL FORMS WILL WORK WITH PARIS?

typical paper patient form showing the label attached



PaRIS does not print medical records with the exception of the PDF file used to help with referrals. There are exports available but in most popup clinics there are not high-speed printers. Therefore, the usual routine is that a group organizing clinics will design their own forms and then leave space on them for the PaRIS standard label or one of the other labels.

With this method you are able to design and redesign your forms, make certain areas have different color forms, and the system is not dependent on the design of your forms.

The standard patient label may also be stuck onto the back of your forms if that works better for you.

See the section in this document on the types of patient labels which may be printed with PaRIS.

PATIENTS REGISTERING THEMSELVES ON THEIR MOBILE DEVICES

Patients may create a patient “profile” themselves days or minutes before they walk into your clinic. This profile contains all their information needed for clinic registration. This makes the clinic registration process very quick which reduces the need for all the time sitting face to face with the registration volunteers.

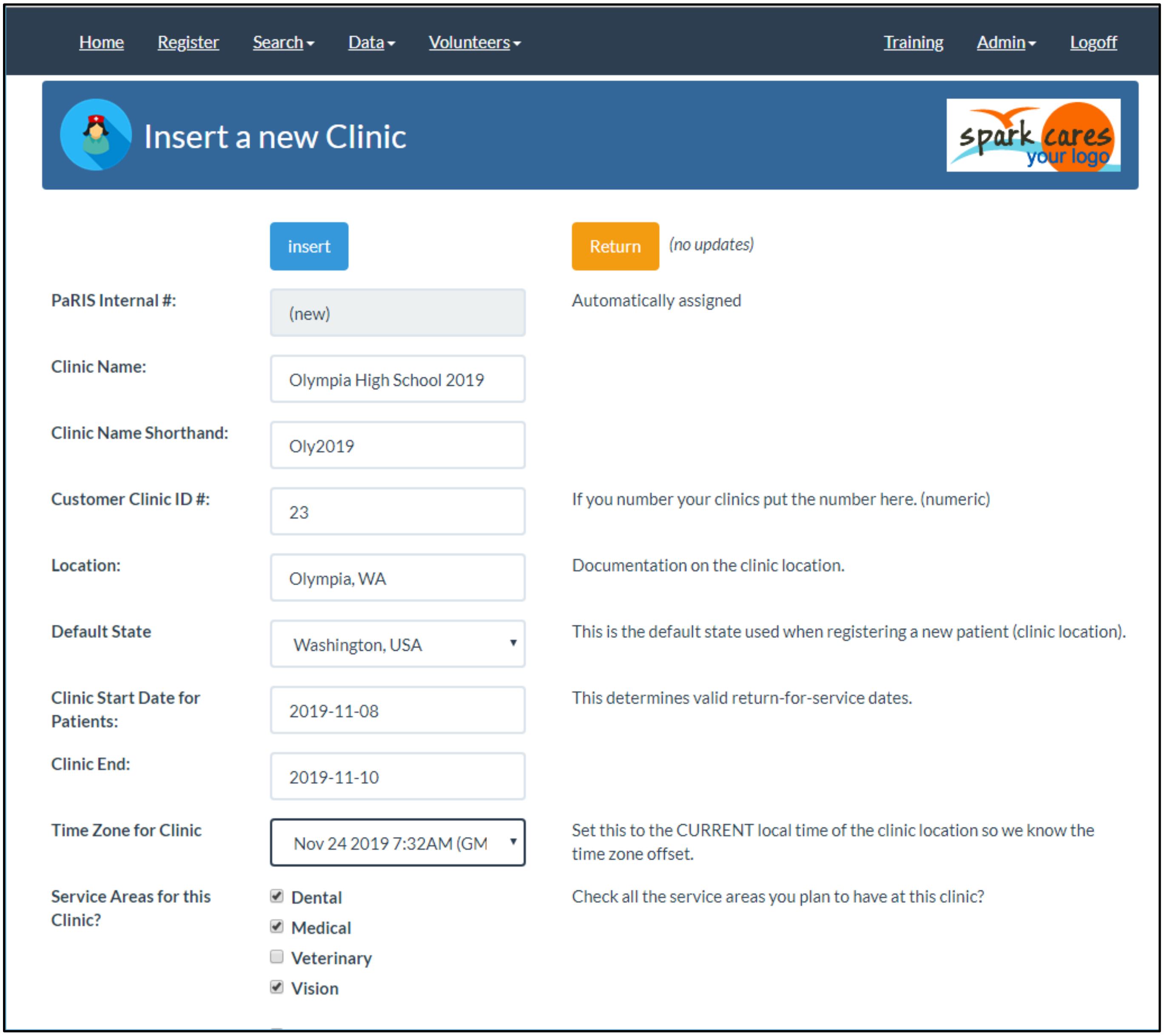
The profile creation process also creates a barcode the patient may use at registration. Using this barcode the patient and registration volunteer may not need to talk at all. This lessens the time, helping with social distancing, and also eliminates most needs for language translations.

See the separate section in this document called ***Patient Smart Phone Registration***.

ADDING A NEW CLINIC EVENT TO PARIS

Most groups using PaRIS will be defining a new clinic for their specific temporary clinic. Groups using PaRIS with permanent clinic locations may be defining a PaRIS clinic for each location and leaving that “clinic” open to register patients all year. Defining a “clinic” allows you to group patients and their initial registration questions.

1. On the Admin menu select Clinic Control.
2. Click the [Add Clinic] button



Clinic Name: Enter the full name for the clinic event or location.

Clinic Name Shorthand: This is used in place of the full name in some reports when there is not enough room for the full name.

Customer Clinic ID#: If you number your clinic you may keep track of the identifying number here.

Location: Enter the location of the clinic. This is just for your documentation.

Default State: When registering new patients enter the state that will show up as the default for patients. Selecting the correct state can speed up patient registration.

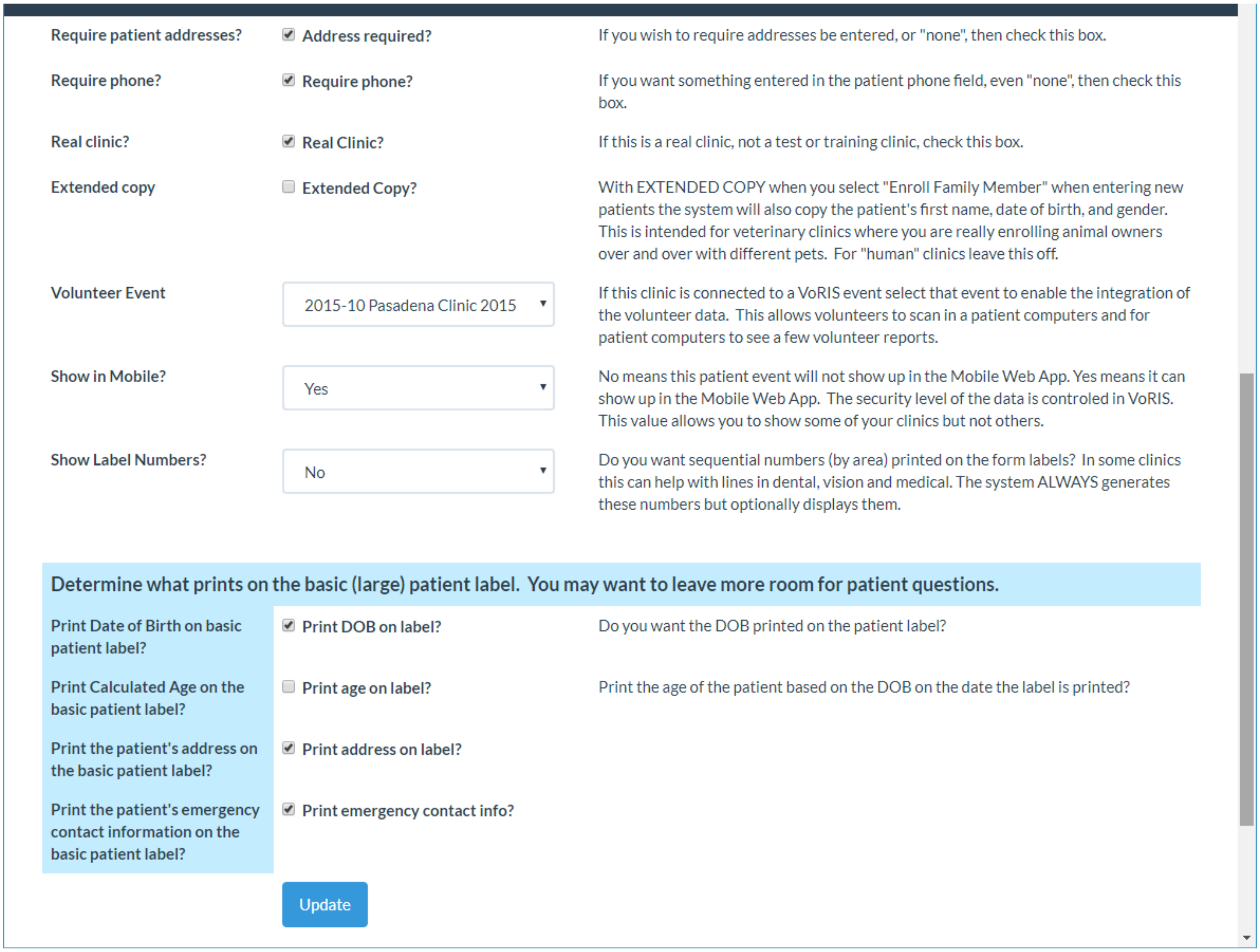
Clinic Start Date for Patients: This is used to sort the clinics in date order. Some reports may use this value.

Clinic End: This is for your own documentation.

Time Zone for Clinic: Set this to the CURRENT local time of the clinic location so PaRIS knows the time zone offset for your reports. Most reports will show the date/time captured in the clinics local time even though the PaRIS system is located in the Pacific time zone.

Service Areas for this Clinic: Your PaRIS system may have any number of service areas and each of your clinics may be using all or a few of those service areas. Select the service areas for the clinic being defined.

Continue to the next page for the rest of the parameters.



Require patient addresses?	☑ Address required?	If you wish to require addresses be entered, or "none", then check this box.
Require phone?	☑ Require phone?	If you want something entered in the patient phone field, even "none", then check this box.
Real clinic?	☑ Real Clinic?	If this is a real clinic, not a test or training clinic, check this box.
Extended copy	☐ Extended Copy?	With EXTENDED COPY when you select "Enroll Family Member" when entering new patients the system will also copy the patient's first name, date of birth, and gender. This is intended for veterinary clinics where you are really enrolling animal owners over and over with different pets. For "human" clinics leave this off.
Volunteer Event	2015-10 Pasadena Clinic 2015	If this clinic is connected to a VoRIS event select that event to enable the integration of the volunteer data. This allows volunteers to scan in a patient computers and for patient computers to see a few volunteer reports.
Show in Mobile?	Yes	No means this patient event will not show up in the Mobile Web App. Yes means it can show up in the Mobile Web App. The security level of the data is controled in VoRIS. This value allows you to show some of your clinics but not others.
Show Label Numbers?	No	Do you want sequential numbers (by area) printed on the form labels? In some clinics this can help with lines in dental, vision and medical. The system ALWAYS generates these numbers but optionally displays them.

Determine what prints on the basic (large) patient label. You may want to leave more room for patient questions.

Print Date of Birth on basic patient label?	☑ Print DOB on label?	Do you want the DOB printed on the patient label?
Print Calculated Age on the basic patient label?	☐ Print age on label?	Print the age of the patient based on the DOB on the date the label is printed?
Print the patient's address on the basic patient label?	☑ Print address on label?	
Print the patient's emergency contact information on the basic patient label?	☑ Print emergency contact info?	

Update

Require patient addresses? If this is checked then for this clinic some value must be entered into the Address 1 field and the City field. These values may be 'none' or 'n/a' or 'not given' (or anything), but they may not be blank.

Require phone? If this is checked then for this clinic some value must be typed into the phone field for the patient. This value may be 'none' or 'n/a' or 'not given' (or anything), but it may not be blank.

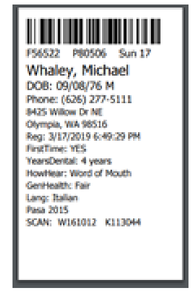
Real Clinic? If this is a real clinic, not a test or training clinic, check this box. You may define clinics to train new administrators or experiment with patient questions. This setting allows PaRIS to ignore those clinics when gathering statistics for your reports.

Extended Copy With EXTENDED COPY when you select "Enroll Family Member" when entering new patients the system will also copy the patient's first name, date of birth, and gender. This is intended for veterinary clinics where you are really enrolling animal owners over and over with different pets. For normal clinics leave this setting off.

Volunteer Event For those groups also using the VoRIS volunteer system, this setting allows you to connect this patient event to that volunteer event. This allows you to check in volunteers which using PaRIS, run some volunteer reports, and find volunteers.

Show in Mobile? PaRIS comes with a mobile website formatted for small smart phone displays. This mobile web app contains over 30 reports showing real time information about your clinic. See the section on the Mobile Web App in this document.

Show Label Numbers? PaRIS keeps track of the order patients are registered in the system. You clinic process flow may depend on that order to provide the access to services fairly. If it helps you clinic patient management you may select YES and the order of the patient's registration is then printed on the large "standard" patient label.

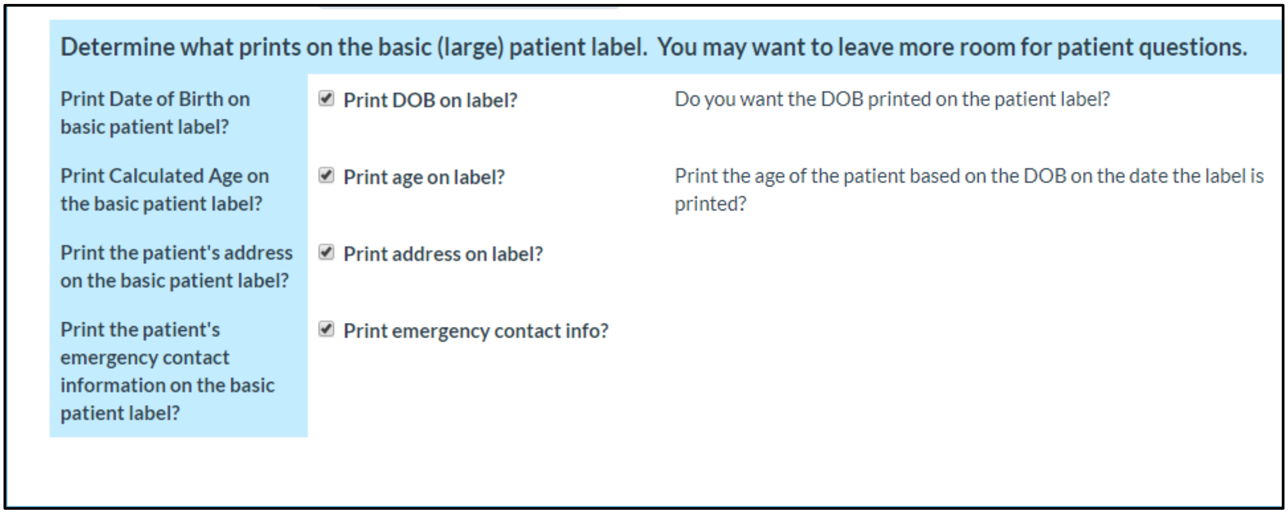


Copy Questions From: When setting up a new clinic the patient questions need to be defined. To make this quick and easy you may copy the questions from an existing clinic.

Continued on the next page

DETERMINING WHAT INFORMATION PRINTS ON THE LARGE PATIENT LABEL.

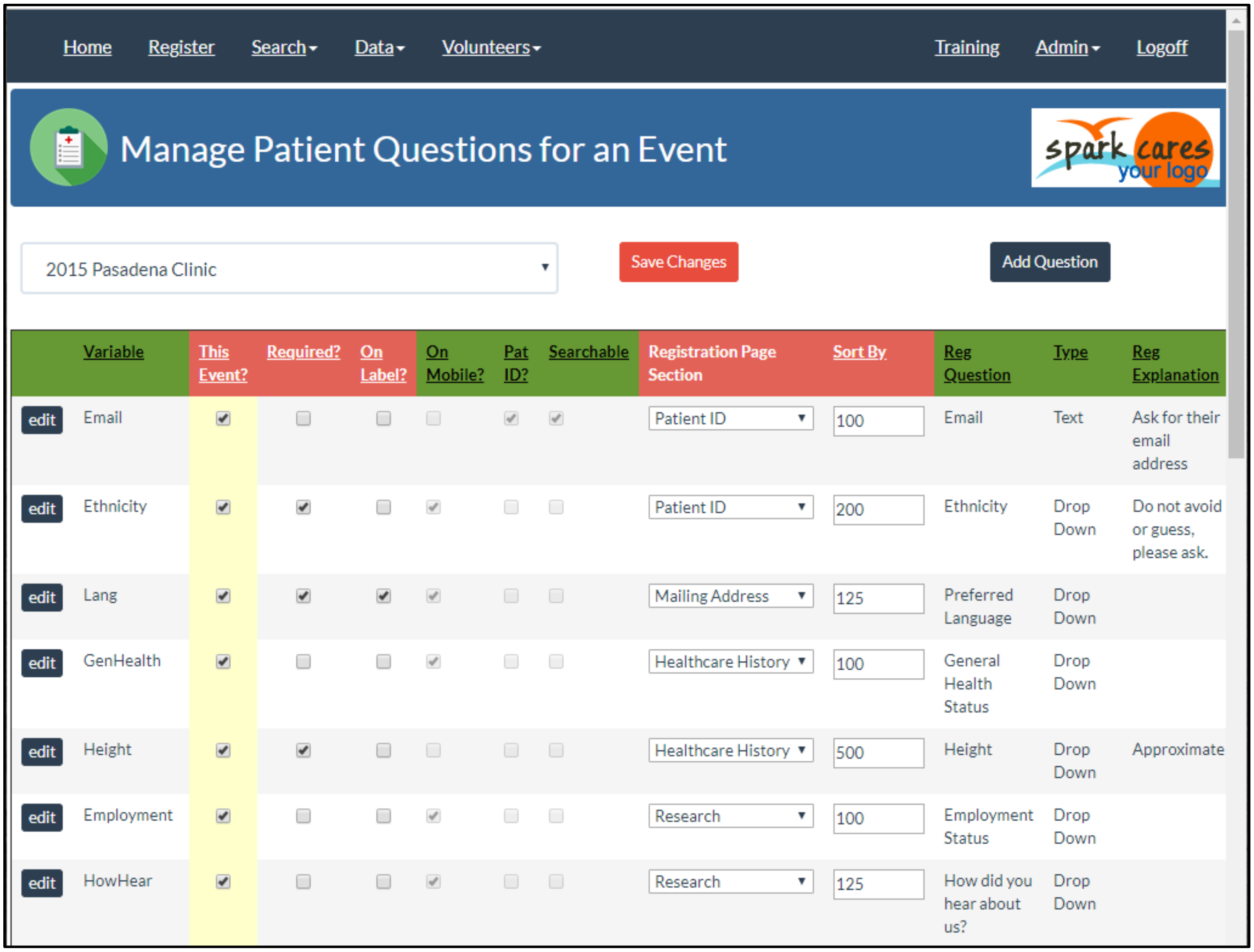
These controls only determine what is printed on the large “standard” patient label.



For much more information on your options with patient labels see the section of this document titled Patient Printed Labels on page 48.

MAINTAINING PATIENT REGISTRATION QUESTIONS

The definition of the questions used on the patient registration pages is completely under your control. You define the questions and the order and the “section” of the patient registration page showing these questions. You may optionally include each question/answer on the standard patient label. Questions may be included/excluded by clinic with each clinic using their own questions or adding just a few depending on local needs. For example at a clinic in Texas you may ask about cattle ranching while that <u>same weekend</u> you have a clinic in Las Vegas and ask about access to clean water.



	Variable	This Event?	Required?	On Label?	On Mobile?	Pat ID?	Searchable	Registration Page Section	Sort By	Reg Question	Type	Reg Explanation
edit	Email	✔				✔	✔	Patient ID	100	Email	Text	Ask for their email address
edit	Ethnicity	✔	✔		✔			Patient ID	200	Ethnicity	Drop Down	Do not avoid or guess, please ask.
edit	Lang	✔	✔	✔	✔			Mailing Address	125	Preferred Language	Drop Down	
edit	GenHealth	✔			✔			Healthcare History	100	General Health Status	Drop Down	
edit	Height	✔	✔					Healthcare History	500	Height	Drop Down	Approximate
edit	Employment	✔			✔			Research	100	Employment Status	Drop Down	
edit	HowHear	✔			✔			Research	125	How did you hear about us?	Drop Down	

Question parameter definitions:

Variable = The variable name used in exported data and printed on the patient label if requested.

This Event? = Is this question used with the indicated event? If checked then the question shows up on the patient registration page. To change it just check or uncheck the box and click the red [Join Questions] button.

Required? = is this a required question for this event?

On Label? = Is this value printed on the patient labels?

On Mobile? = Is this question displayed on the mobile patient questions page?

Pat ID? = Is this patient identifiable information? We use this when building exports of the data so that no sensitive information is shared.

Searchable = Is this value searchable on the patient search page?

Registration Page Section = The section on the registration page with this question (if any).

Sort By = This is the order of the questions on the page

Reg Question = The way the question appears on the registration page.

Type = Is this a drop down list or radio button list or just a text entry?

Reg Explanation = This is the explanation printed on the right hand side of the data entry field.

RED VALUES ON THE PAGE

The red values are set by event, not globally. These values are updated on this page with the red [Save Changes] button.

ADDING A QUESTION TO AN EVENT:

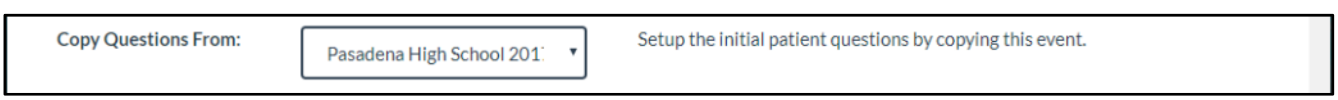
1. Check the "This Event?" checkbox
2. Select a value for "Reg Section"
3. Select the sort value to indicate the order of the question on the registration page.
4. Click the [Save Changes] red button at the top.

REMOVING A QUESTION FROM AN EVENT:

1. Uncheck the "This Event?" checkbox
2. Click the [Save Changes] red button at the top.

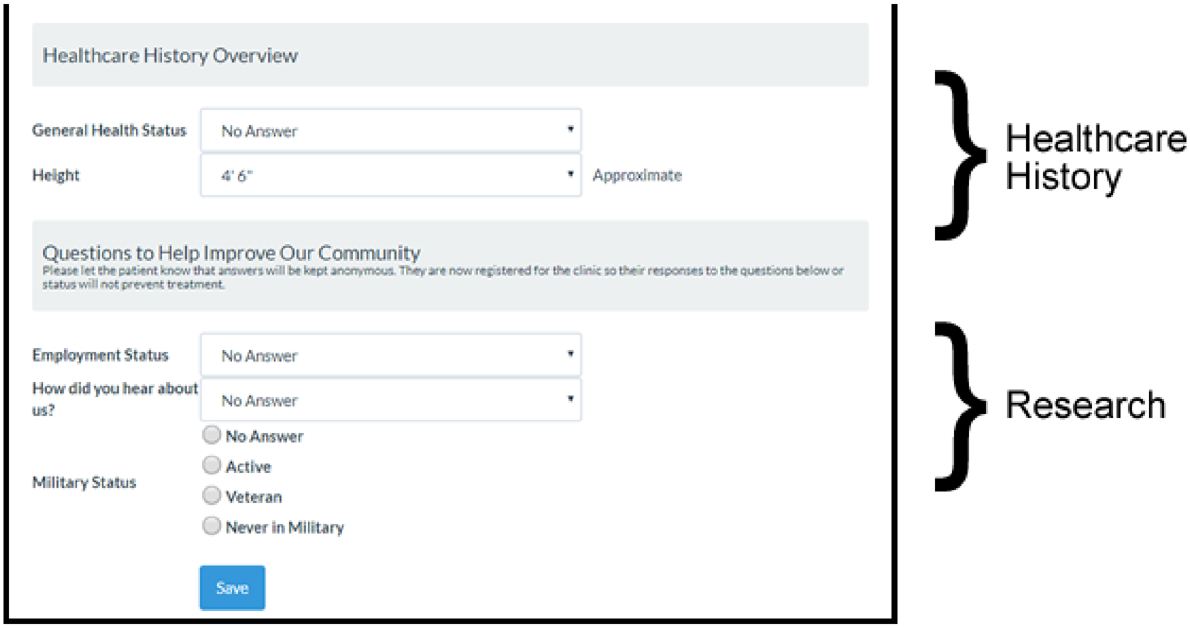
SETTING UP QUESTIONS FOR A NEW CLINIC

When you add a new clinic there is a drop down list of the other clinics you have defined. Select a clinic in the list in order to copy those patient question definitions. From there you may add or remove questions.

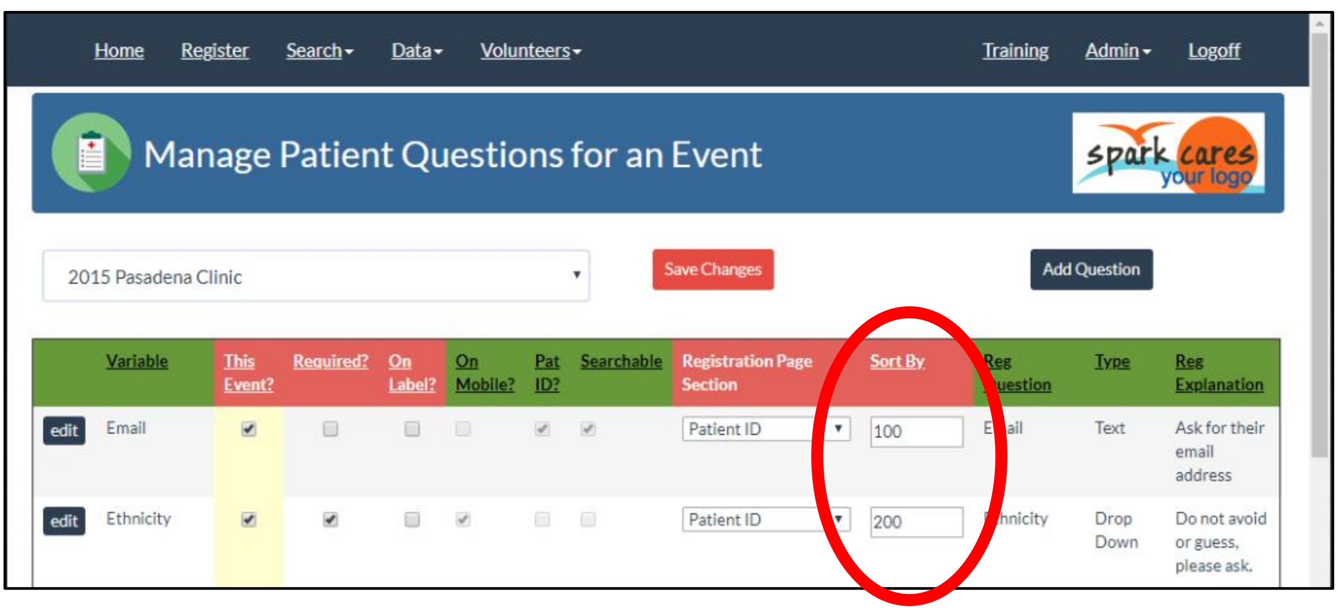


PATIENT QUESTION SECTIONS

The following are the section definitions for the patient questions.

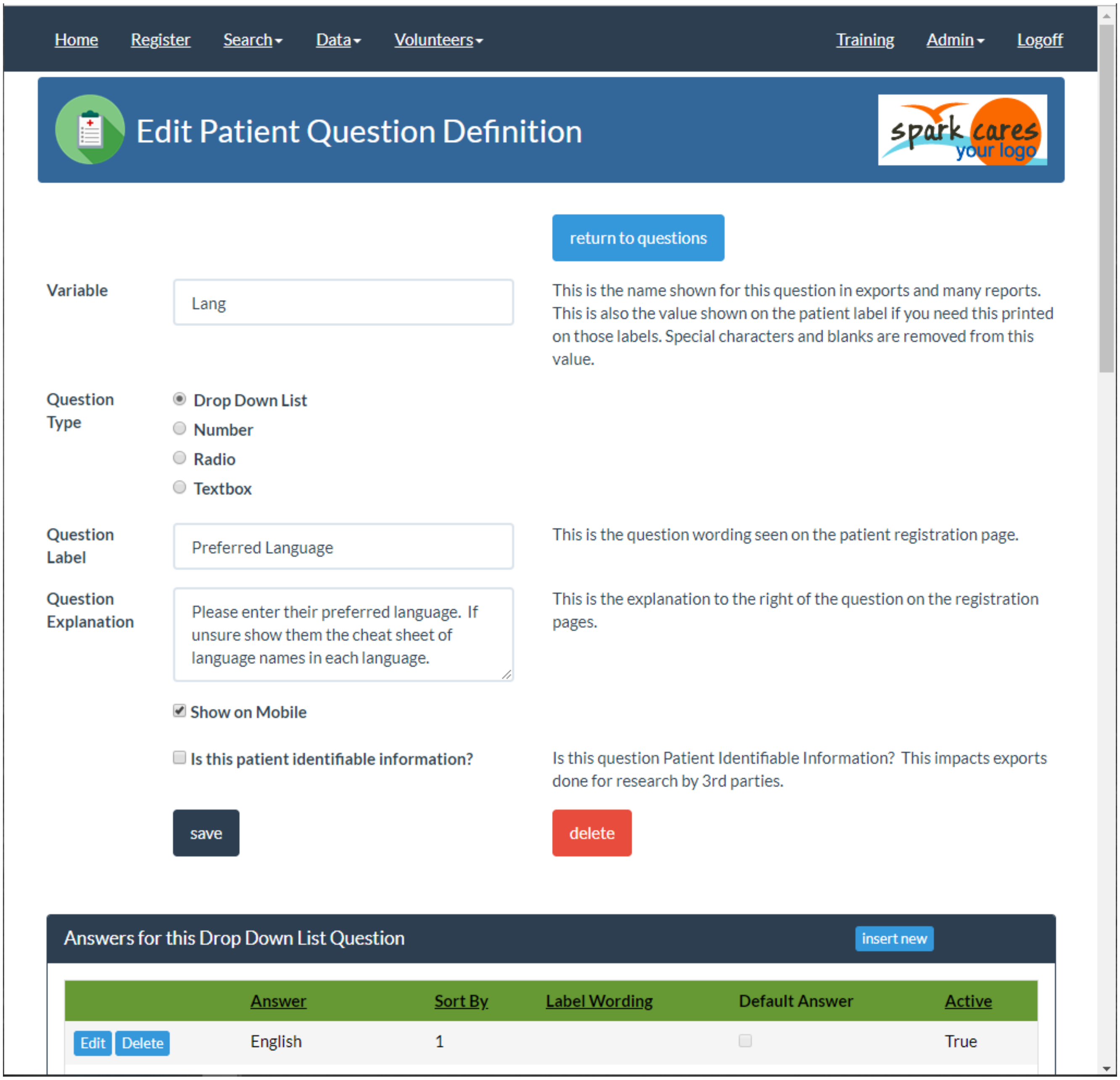


Within each section the questions are ordered by the "Sort By" value in the definition of the question. Note that the SORT BY is specific to a clinic. This means questions can be in a different order based on the clinic.



PATIENT QUESTION DETAILS – CONTROLLING EACH QUESTION

Each question in the system has globally defined values and then values defined for each individual clinic. The page below shows the values defined globally.



Variable = This is the label which will show up in reports for this question's data. It is only used for reporting.

Question Type = This defines how the question will appear on the services entry page.

- **Drop Down List** = This indicates that you will supply a list of possible values. In the example shown we are providing a list of languages to be shown in the drop down list.

- **Number** = The answer will be validated as a number. This is shown as a text box allowing your registration person to type in the number. This might be weight or years since they have seen a doctor.
- **Radio** = The question will appear as a radio button. This type of entry shows all the possible answers and optionally enforces them selecting one of them. But only one.
- **Textbox** = This is used when there is a text only answer to a patient question.

Question Label = This is the text of the question on the patient registration page.

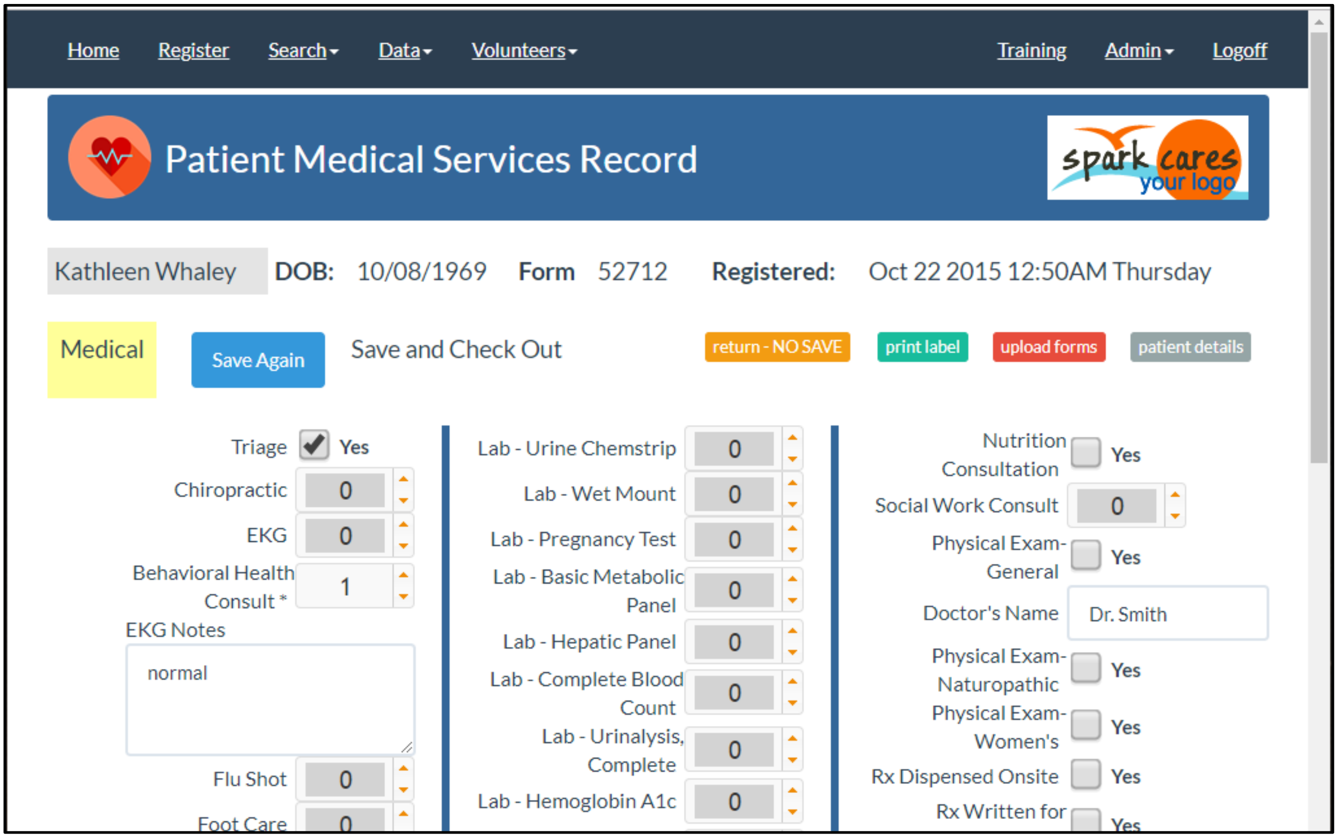
Question Explanation = This is the explanation to the right of the question that shows up on the patient registration page.

Show on Mobile? = Do you want this answer to be shown on the mobile web app? See the section on the mobile web app.

Is this patient identifiable information? = Check this box if the question/answer is considered patient identifiable information. This is automatically excluded from some reports and exports.

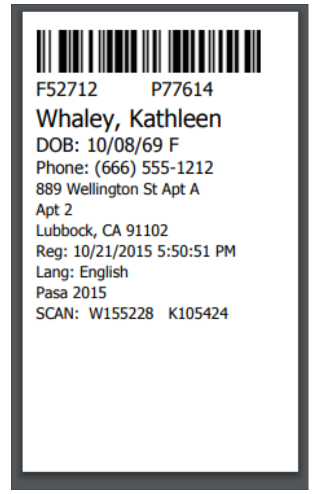
COLLECTING PATIENT SERVICES AND MEDICAL HISTORY

You may customize your system to capture any of the services you need to capture. You decide where on the page those services appear (column and sort order) to group things and make the data entry as quick and accurate as possible.



See the topic on setting up your services for more details on the values and data types.

CAPTURING THE SERVICE DATA AT YOUR CLINICS

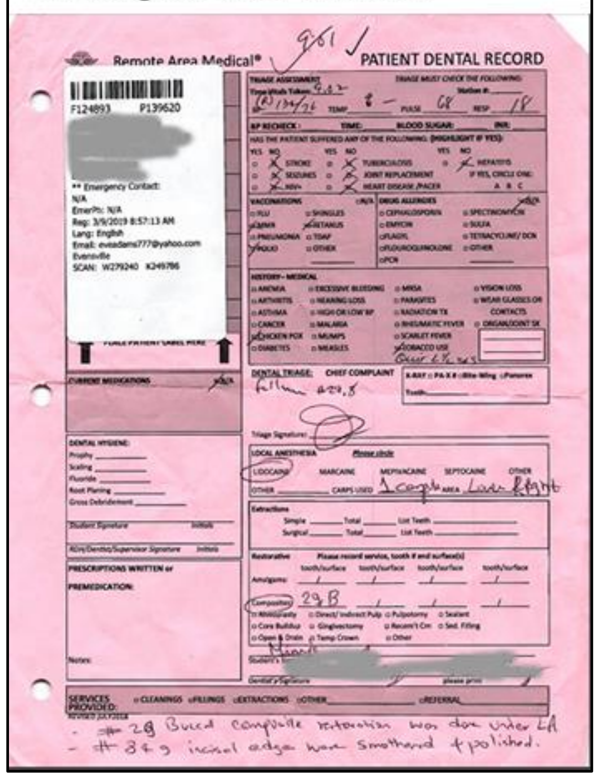


Typically, a PaRIS patient label will be stuck on to each paper medical form used during the patient's visit to your clinic. These are typically printed on inexpensive Dymo label printers as the patient is registered and the label is added to your forms.

These labels are Dymo form number 30256, "shipping labels".

The standard label has a bar code allowing a quick look up of the patient and a quick entry of their services. It also contains their name, date of birth, emergency contact information, and other information you may optionally include. Having this printed on the label speeds up form handling and is more readable than hand writing. See the section of this document on PaRIS labels for the options and additional types of labels.

typical paper patient form showing the label attached



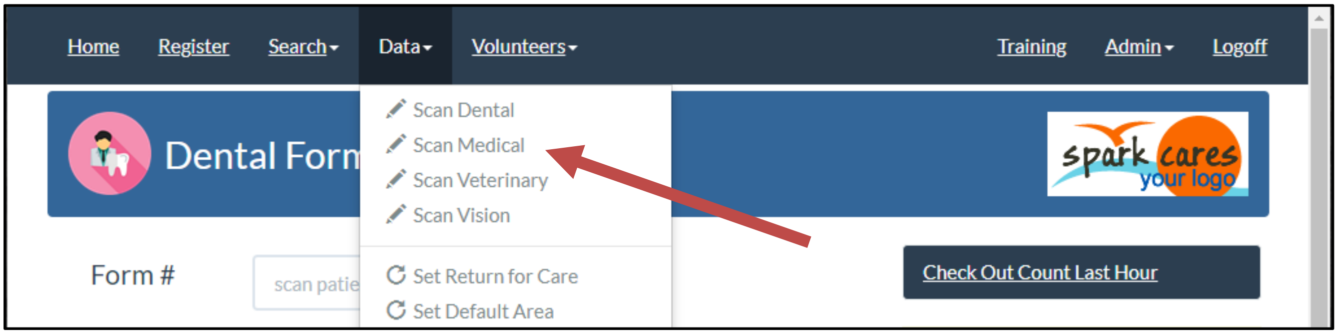
The typical medical form used with PaRIS will leave a space for the PaRIS patient label to be attached to the form. Or to the first form if several pages are involved.

Information on this patient label provides the document management automation with the information needed to automatically connect this form to the correct patient without intervention. See the section on document management for more information.

We have a smaller version of a patient label if this label takes up too much space. See the section on labels.

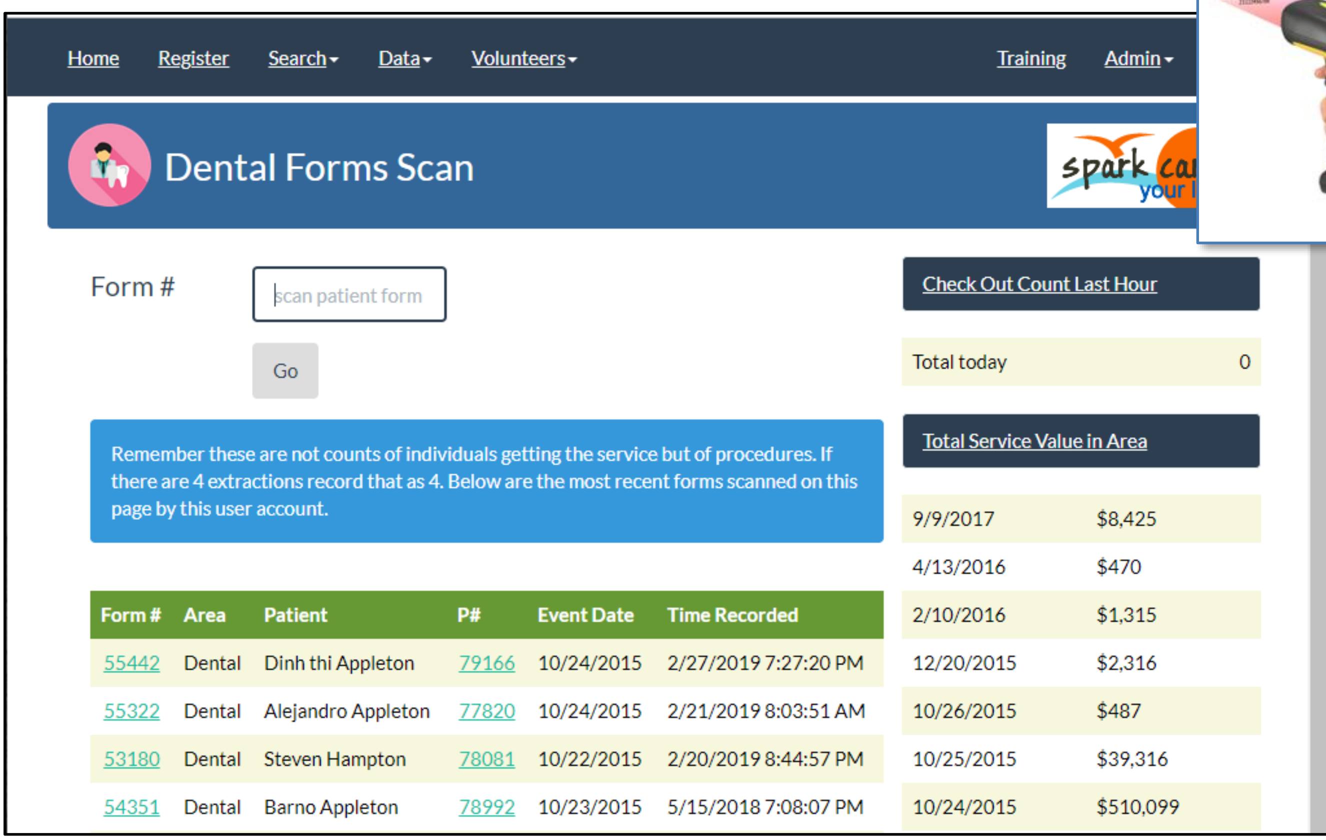
When the services entry person gets the medical form(s) once the patient is finished with their medical care the data entry person opens PaRIS and clicks on the menu:

Data → Scan Dental (or the service area you need)



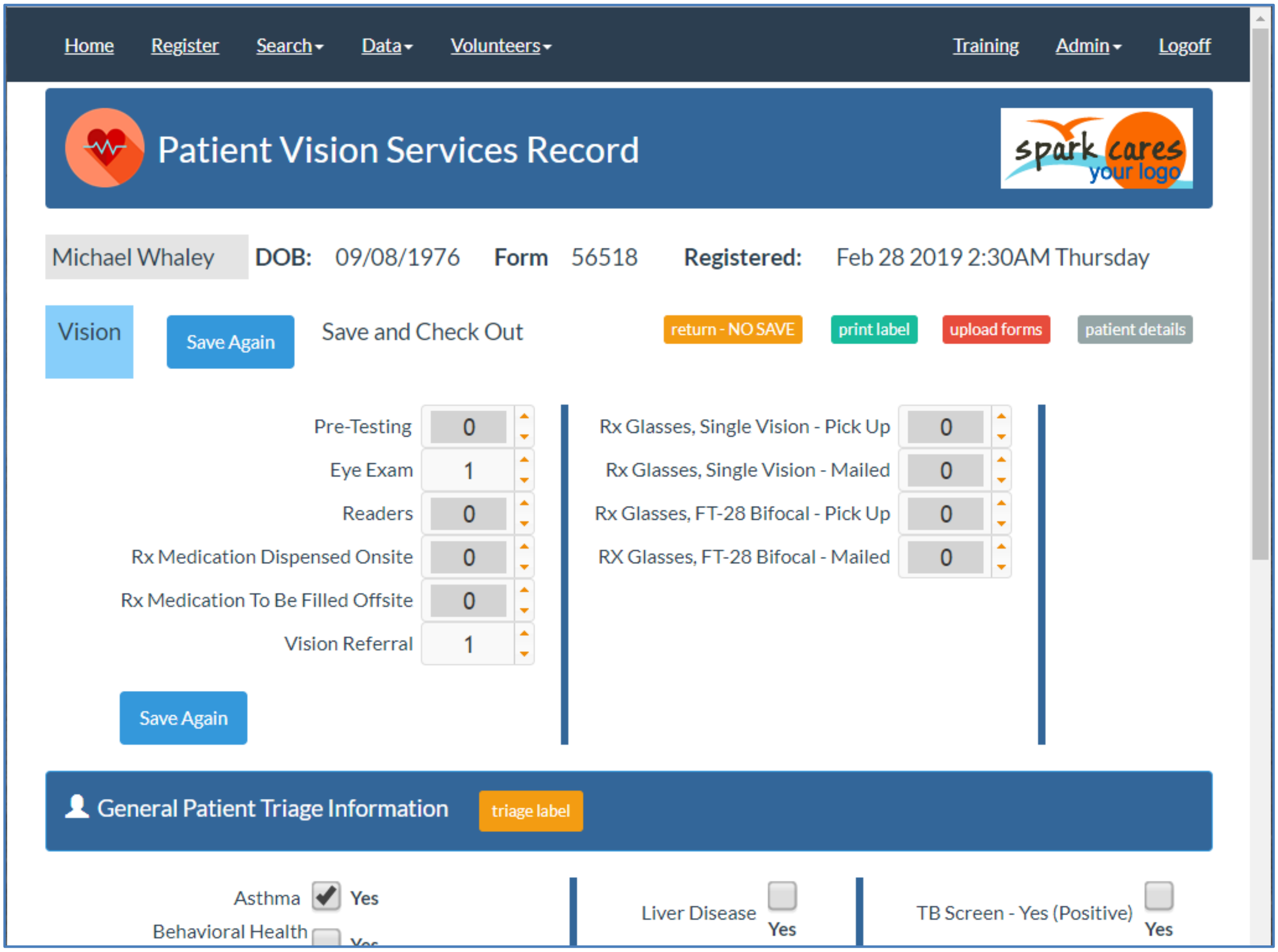
Your system may be setup with a different set of services areas. However, since services are entered by "area" you will want to keep all the services in an area on one set of forms to make service entry as easy as possible.

You will next see the page below. Scanning the barcode on the patient label when you are on the page below will get you to the correct services entry page for the correct patient on the correct day. Typically, you will be using an inexpensive $20 handheld USB barcode scanner to scan the forms.



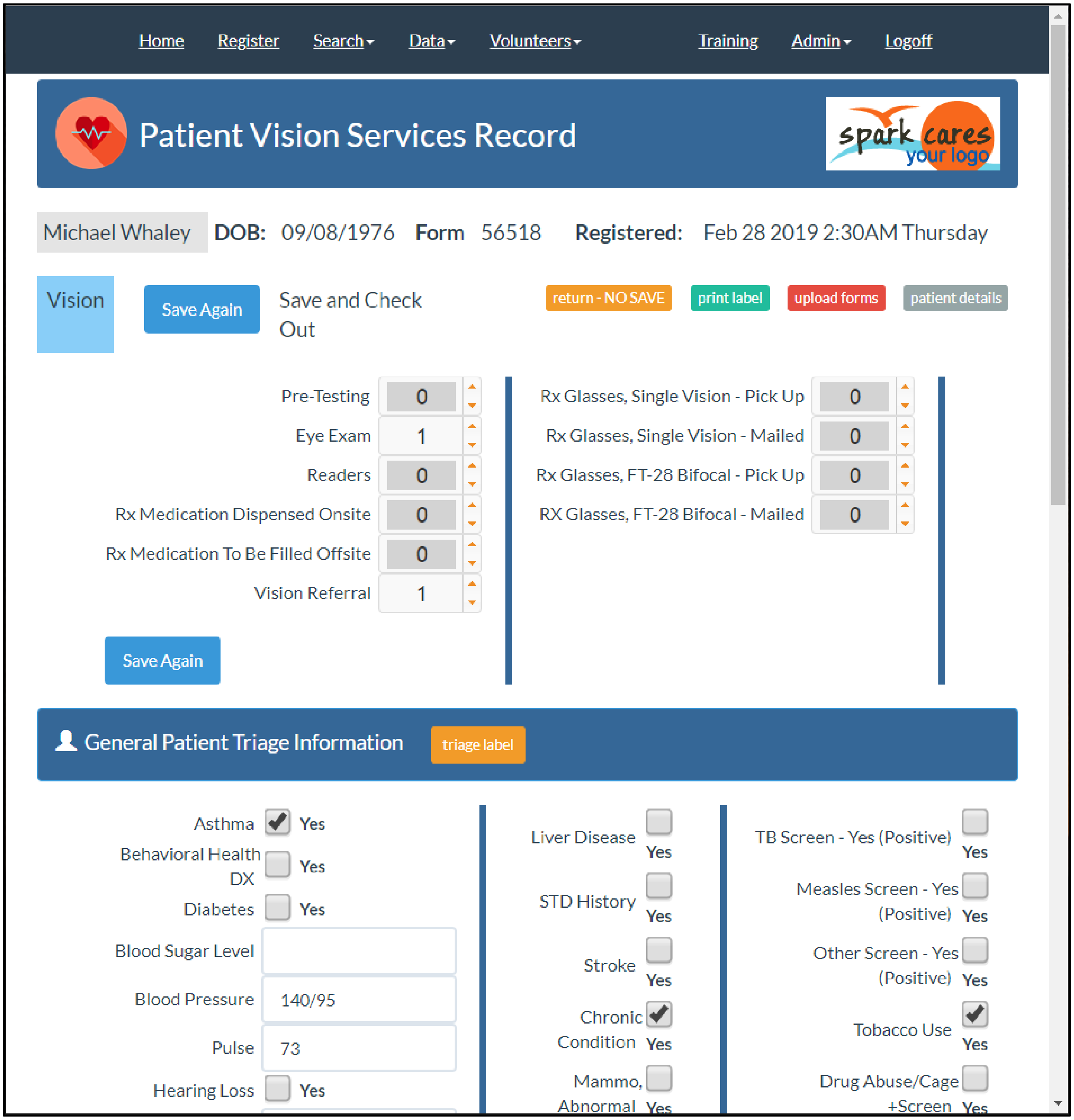
When you have opened the patient's services entry record you will be able to enter the services from the form.

Note that each day the patient will receive a new form and start with a blank services entry page. The patient label barcode contains the patient identifier and the day identifier so that services are entered automatically on the correct day.



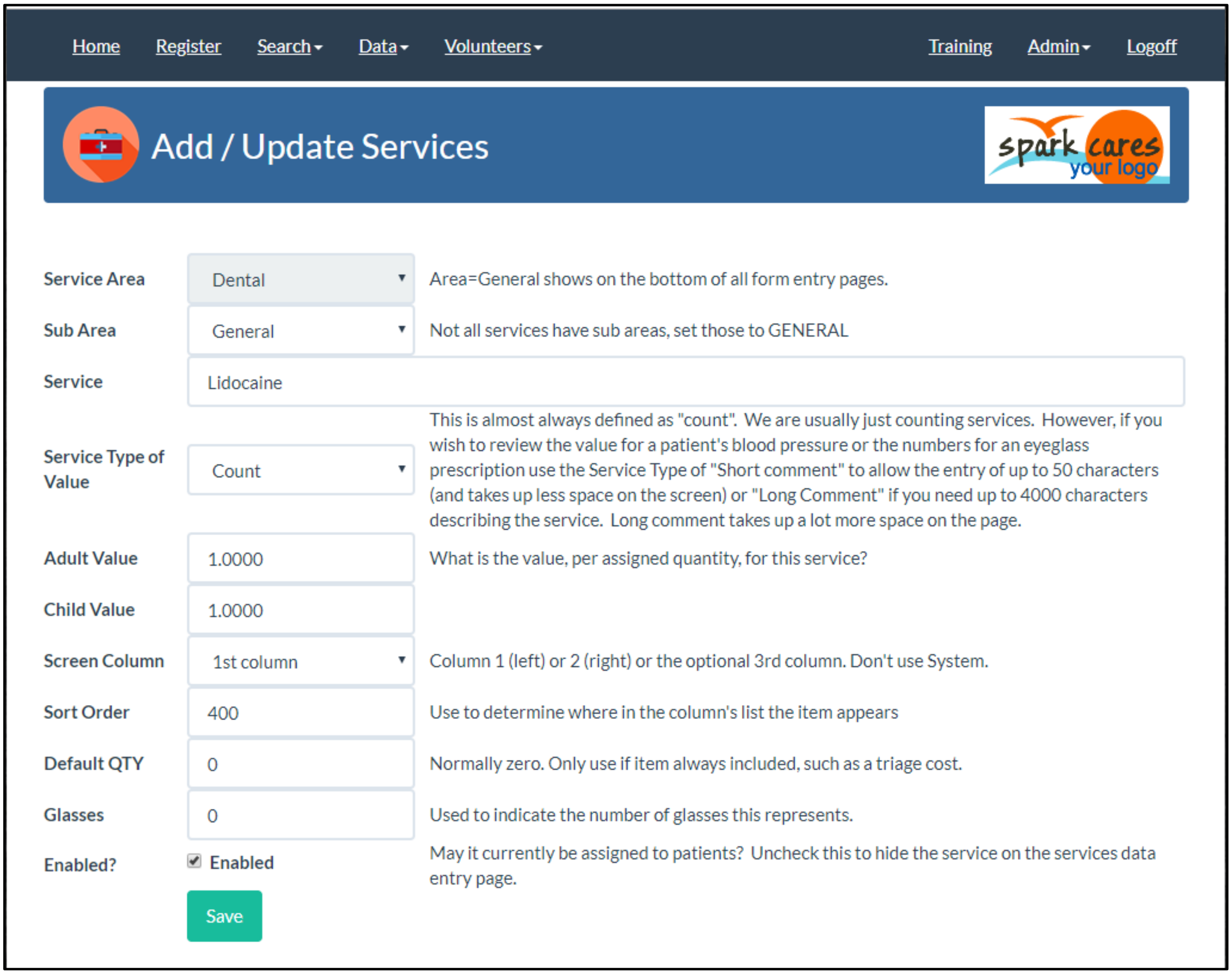
DESIGNING YOUR SERVICES ENTRY PAGE

The patient services entry page, shown below, may contain two or three columns of services. If you have many services you may use the three-column format to make data entry quicker.



When setting up each service you will be providing the following information on the Add / Update Service page.

Note that the service definitions are common across all of the clinics you define in your database.



Sub Area = This is the reporting area for this service. For dental this might be hygiene or restorative. For medical this might be women's health or physicals.

Service = This is the service name that will appear on the data entry page.

Service Type of Value = This defines the data type.

- Count = This allows them to enter the number of services. The number of teeth pulled or glasses provided.
- Short Comment = This is just a 50 character text value. This may be the doctor's name, their blood pressure, or a prescription.
- Long Comment = This is 4000 character text value and is used when more of an explanation is needed. This may be a description of a referral or other comments. This does not fit as easily on the screen so it is best to use the Short Comment when possible.

- Checkbox (Y/N) = This is used for yes/no questions and makes the data entry quicker. This is typically used in their medical history. Smoking Y/N, etc…

Adult Value = This is the dollar value to assign to this service if the service is assigned to someone 18 years old or older (at the time of the service). This value is used on various reports to help document the impact of your clinic.

Child Value = This is the dollar value to assign to this service if the service is assigned to someone less than 18 years old.

Screen Column = This is the column where the service will appear on the data entry screen. It may be column one, two, or three.

Sort Order = This is the order of appearance within the specified column.

Default QTY = This is the default quantity. This is used to automatically insert a "1" value (usually) to a service always provided by that medical area. The primary example is triage. Rather than always having to check triage you might default it to one, or checked, to speed up data entry.

Glasses = This value is rarely used. It represents the number of eye glasses given for this service. This is a legacy value used in older versions of PaRIS.

Enabled? = Uncheck this value to remove it from the data entry page.

CHANGING SERVICE DOLLAR VALUES

Over time your services may change in value. For example, you may decide that a simple tooth extraction is valued at $165. The services and values are captured at clinics and reports are run with these values. A year later you decide the value of a simple tooth extraction is $175.

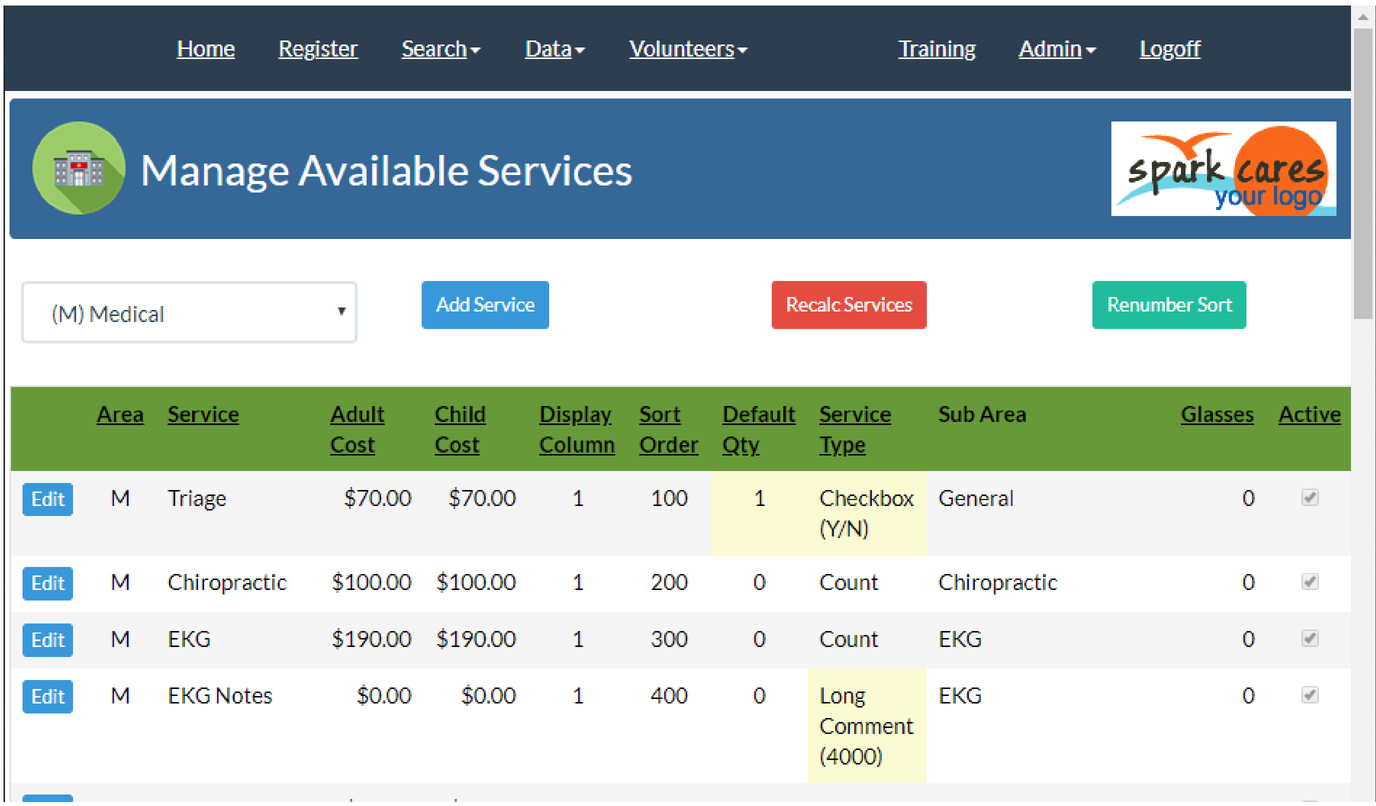
You can then edit the value of the simple extraction service and set the value to $175 without impacting the value of the service at previous clinics. It will just be the value moving forward.

HELP WITH SETTING UP YOUR SERVICES ENTRY PAGE

When setting up the services entry page it is important to get the services organized on the page so that the data entry person can quickly find the service they need and enter the information. This is done by changing the SORT ORDER of the services, and the DISPLAY COLUMN, so things are well organized.

When doing this you may end up with your services in a jumbled mess with small gaps in the sort orders making it difficult to insert services where you need them.

The green [Renumber Sort] button updates your services by re-numbering the SORT ORDER values with a 100 number spacing.

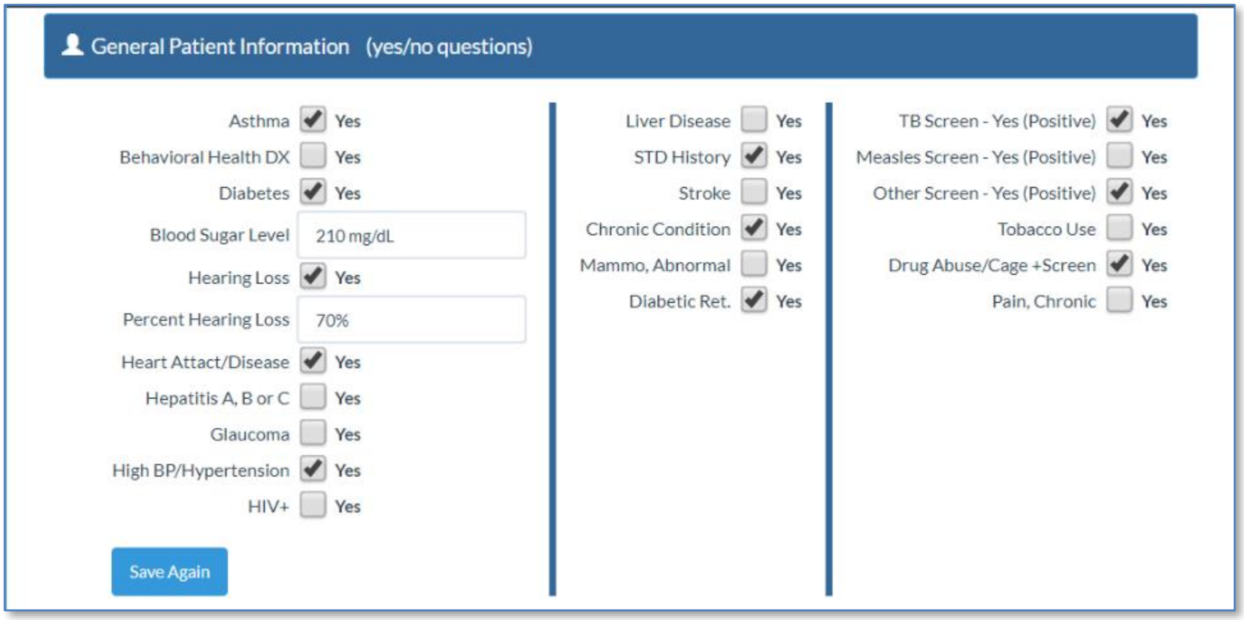


DISABLING SERVICES YOU NO LONGER NEED

When you are finished with services for any reason you may edit the service and uncheck the [ENABLED?] Checkbox. This service will no longer show up on the services page for new clinics. However, if the service has been given to any patients it will still show up in their medical history.

PATIENT GENERAL SERVICES – MEDICAL HISTORY

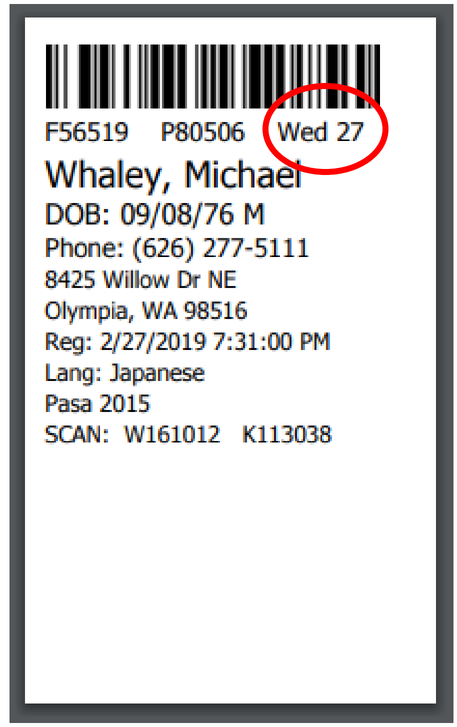
General Services, or medical history, is a special set of services recorded in PaRIS. These are setup and defined in the same way however the entry for these services is at the bottom of all the other service area pages. These values are often just checkboxes (Asthma yes/no, diabetes yes/no, stroke yes/no) but you may also enter specific values as shown in the example below.



The general services / medical history is also handled differently. If you enter a general service, such as Diabetes=YES, then that general service is common across all the areas of service for that day. So if Diabetes=YES is entered in dental on Friday it also shows up in the services on the vision services page on Friday.

In addition general services are carried forward from one day to the next. So if they enter Diabetes=YES on Friday when they come into your clinic on Saturday that value is carried forward.

KEEP IN MIND – SERVICES ARE STORED BY DAY



Services are stored in records by day in PaRIS. Therefore, the services they registered for on Saturday are all kept together.

The barcode on each label contains not only the unique patient identifier but also the registration date.

There can be some confusion at clinics if a patient registers for dental services on both Friday and Saturday. When they register on Friday, they will get a form with a barcode associated with Friday. When they register again on Saturday, they should get a new "Service Day" assigned for Saturday and a Saturday label printed. If they end up with both forms in hand, or your volunteers print the wrong label for a patient, then it can be confusing when volunteers scan the barcode to enter services.

See the example label image to the right to see where the label date is indicated.

RETURN FOR CARE AND LABELS

Your return for care processing, where a patient registers on Friday but is told to return on Saturday to finish their services, can be confusing. The patient will return on Saturday with a Friday form. This will still work fine. Scan the form Saturday when they are finished and record their services. The services will show up for their registered day in their personal record but show up as Saturday for the workload reports.

You may, of course, setup a new Service Day for Saturday when they return and print them a Saturday label. However, that is not usually considered necessary.

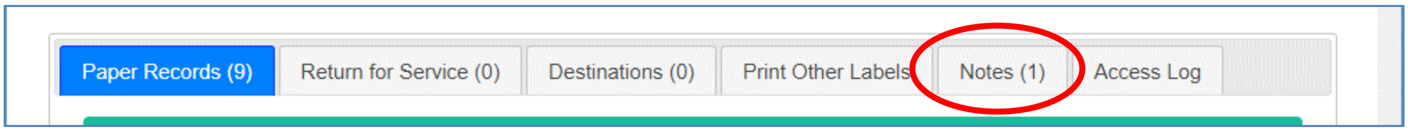
PATIENT BRINGING A FORM FROM ANOTHER CLINIC

If a patient brings a PaRIS form/label from another clinic your policies may allow it. However, for PaRIS record keeping the volunteer should perform a patient name search and Add a Service Day for the current clinic. Then print them a new label for a new form. Possibly staple the two together if their old form contains doctor notes you need.

KEEPING NOTES WITH A PATIENT'S RECORD

You may type in notes/comments into a patient's record. To do this open a patient's detailed medical record and find the tabs towards the bottom of the page. (seen below)

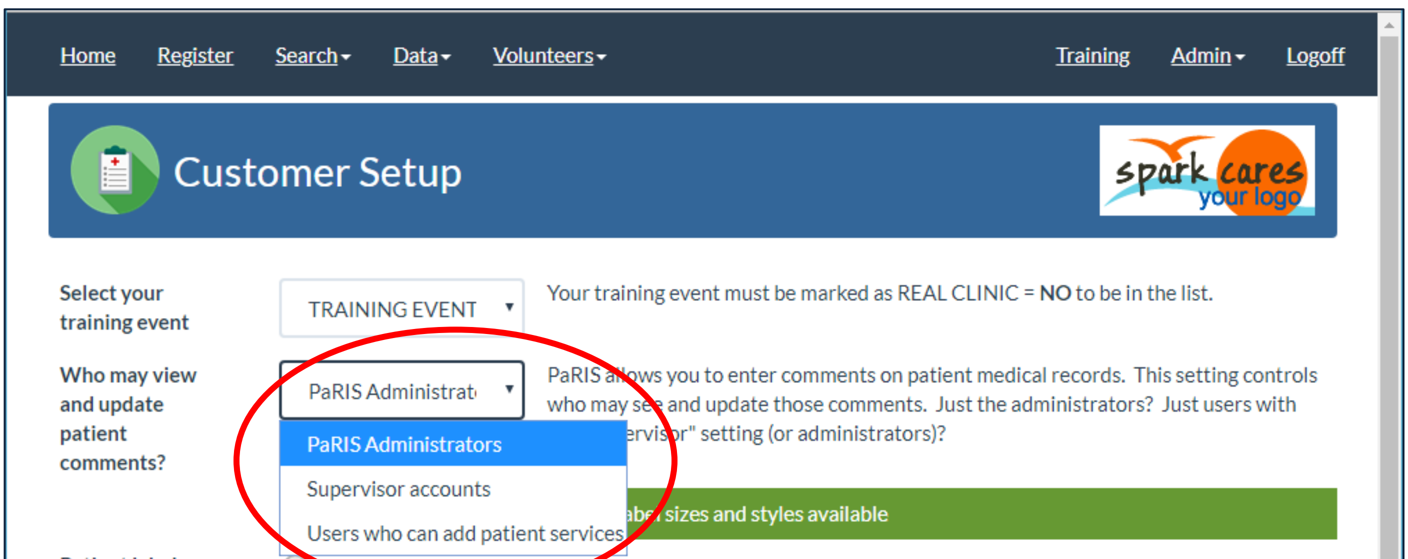
Click on the /notes\ tab to view and update the notes. If there is a (1) it indicates there are currently some saved notes.



SECURITY FOR PATIENT NOTES

Your group may save harmless general information in notes and make the information more generally available. However, if you are saving more sensitive information then you may set the permission level for viewing and updating notes to a higher level.

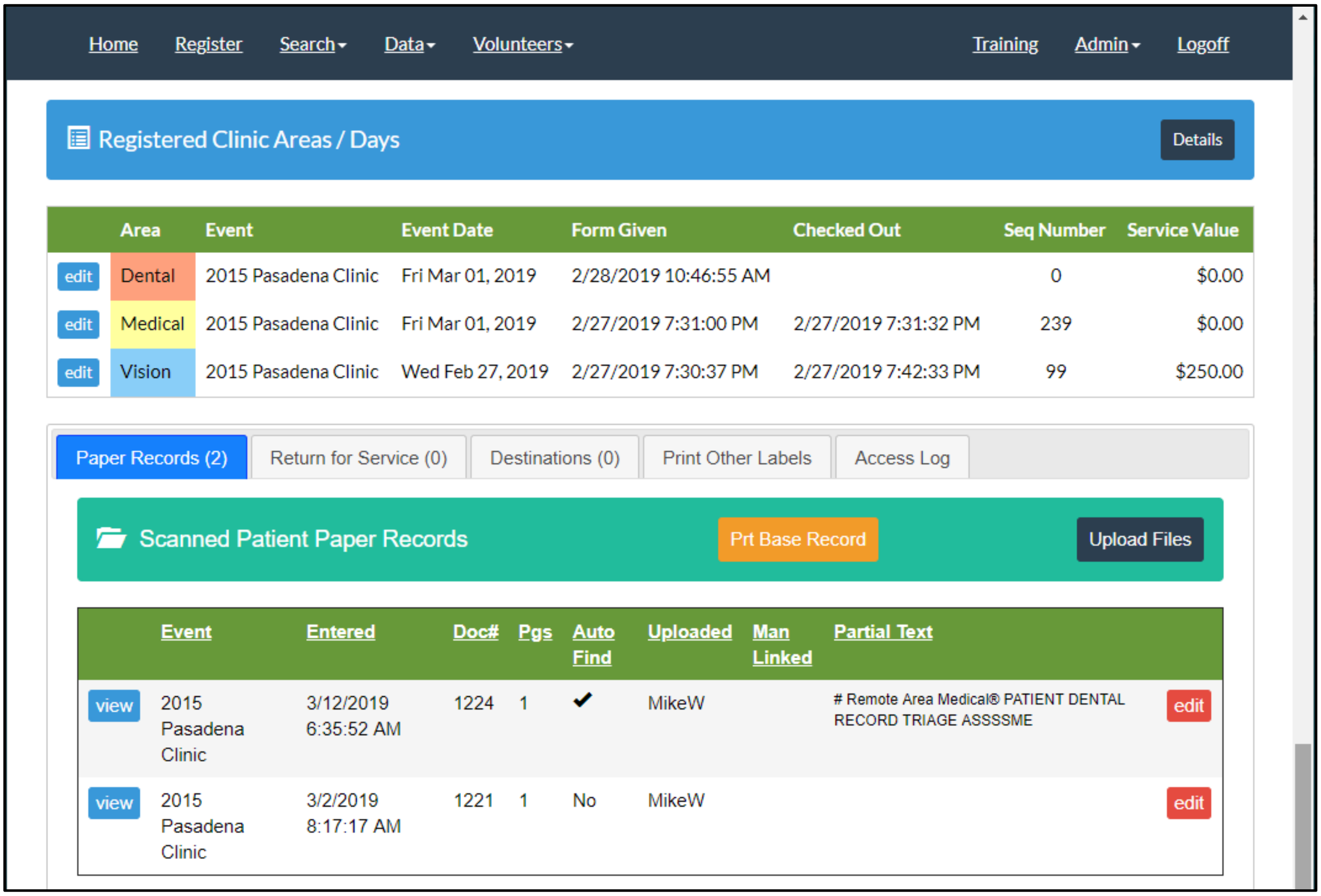
To adjust the security level for patient notes use menu **Admin → Customer Setup**



Set the security level using the drop down list.

VIEWING THE FULL PATIENT MEDICAL RECORD

If you have permissions to view the full patient medical record a name search or barcode scan can get you to their record from the Name Search page. When on the Patient Record page, after the patient questions, you will see all their medical information for all their clinics and days of services.



The first area shown above lists the days and areas they have registered for services. If they have registered with many clinics or many days, they will all show here. It shows the date the form was given them for each area and if they checked out and received services (not always the case) then the checked-out date/time is also shown.

After that area you will see five tabs of other patient information.

Paper Records This tab shows all the paper records which have been scanned and uploaded for this patient. These paper record images are organized by clinic and show the event where they were added. In many cases several pages may be combined into a single file. A single file may contain a dental record, an x-ray, a prescription and doctor's notes.

Return for Service If the patient has ever been scheduled for a Return for Service that information is listed under the second tab.

Destinations If the patient has ever had any materials sent offsite as part of the PaRIS destinations processing that information is shown on the third tab. See the section in this documentation on destinations processing.

Print Other Labels This tab gives you buttons to allow you to print other kinds and sizes of labels.

Access Log This tab shows the access list for this patient's records.

RETURN FOR CARE – ASKING PATIENTS TO RETURN ANOTHER DAY

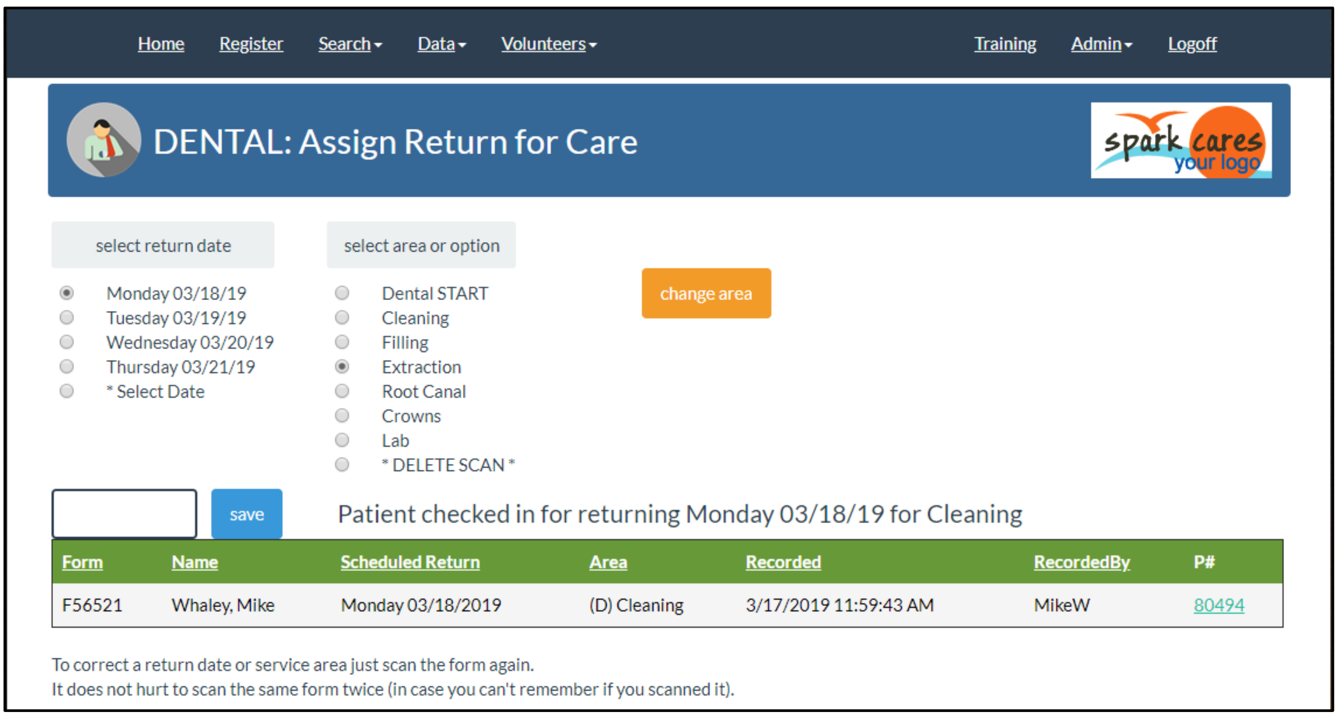
In some cases, you may be asking some patients to return on another day. You may give them a pass or armband or some kind of note and have them show it to the volunteers at the door. This might happen because you have patients left at the end of the day or their services needed some kind of follow up the next day.

PaRIS helps this process by allowing you to mark these patients as Return for Care in the system. When you mark a patient you also identify generally what service category they are returning for. This gives you counts and planning for the next day. For example, they may be returning for dental hygiene, or vision, or women's services.

SIGNUP SOMEONE FOR RETURN FOR CARE

To signup someone for Return for Care use the menu: **Data → Set Return for Care**

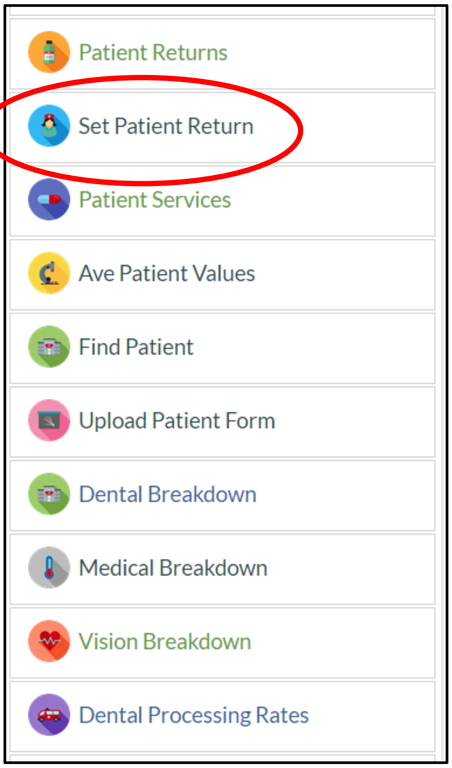
You will see the page below. Click on the expected return date and the area and then scan their patient label's barcode.

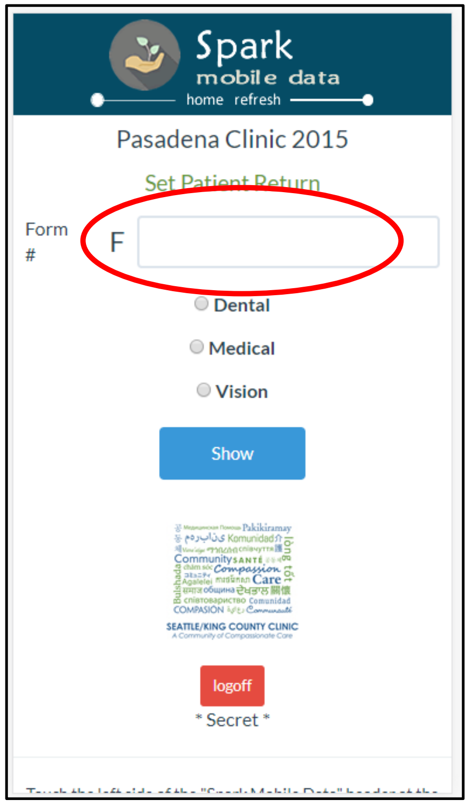


SIGNUP SOMEONE FOR RETURN FOR CARE WITH YOUR SMARTPHONE

You can also signup someone for Return for Care with your smartphone if you have the appropriate password.

Open your mobile web PaRIS app and find the item "Set Patient Return" in the list of services. Click on that open and you will see the page asking for the F number (form number) seen on the PaRIS patient label. Enter that number, without the F, and follow the prompts to register them for return for care.





This can be handy as you don't have to find a computer to put someone on the return list. You may assign a volunteer to put people seated in an area on the list or a dentist may call you over to put someone on the list. This can be handled immediately using your phone which makes it quick and easy.

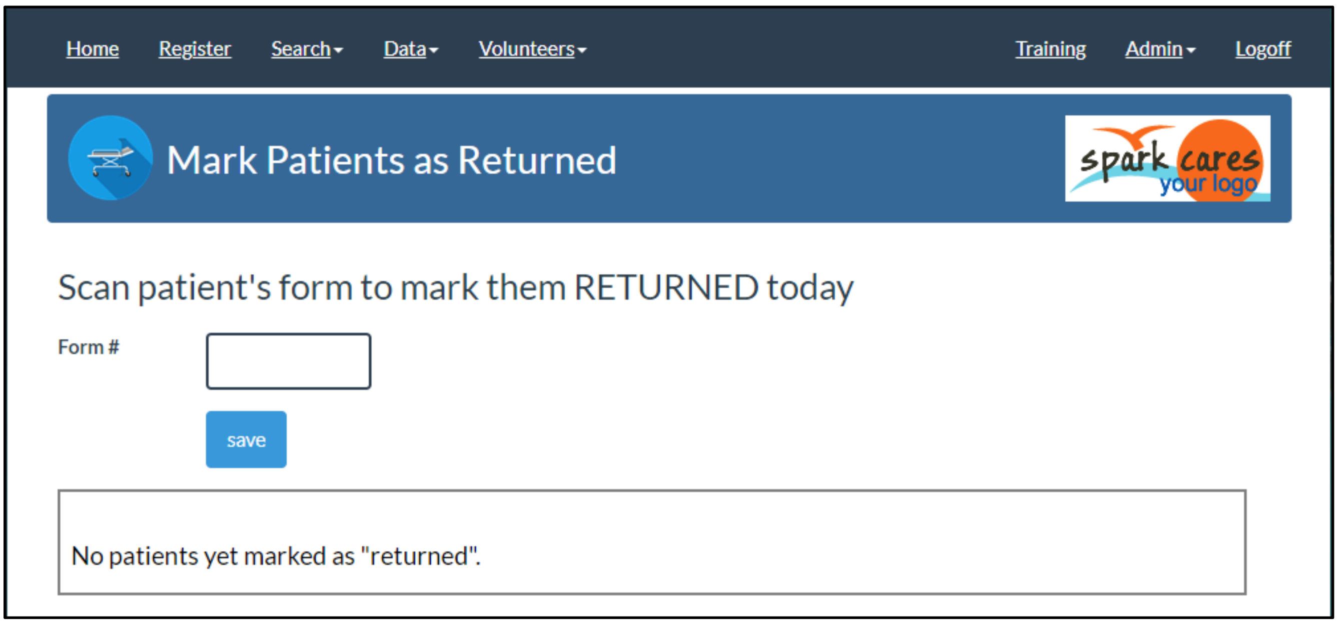
CHECKING IN PATIENTS WHEN THEY RETURN

How many patients on the Return list have returned? By checking them in quickly you can know.

Click on menu: Data → Check In Returns

Open the page on any computer with any account and just scan the patient labels on their forms. The system knows who is checked out and records their returns.

If they were not originally signed up to return you will see a message.

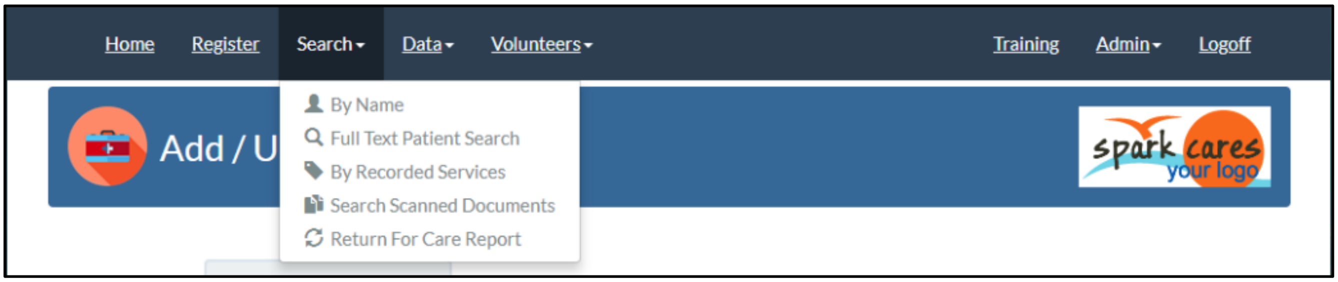


This is very quick. Sometimes you may just have a laptop held by a volunteer, not even connected to power, and just scan the returning line of patients. This does not add time to getting them back into the building.

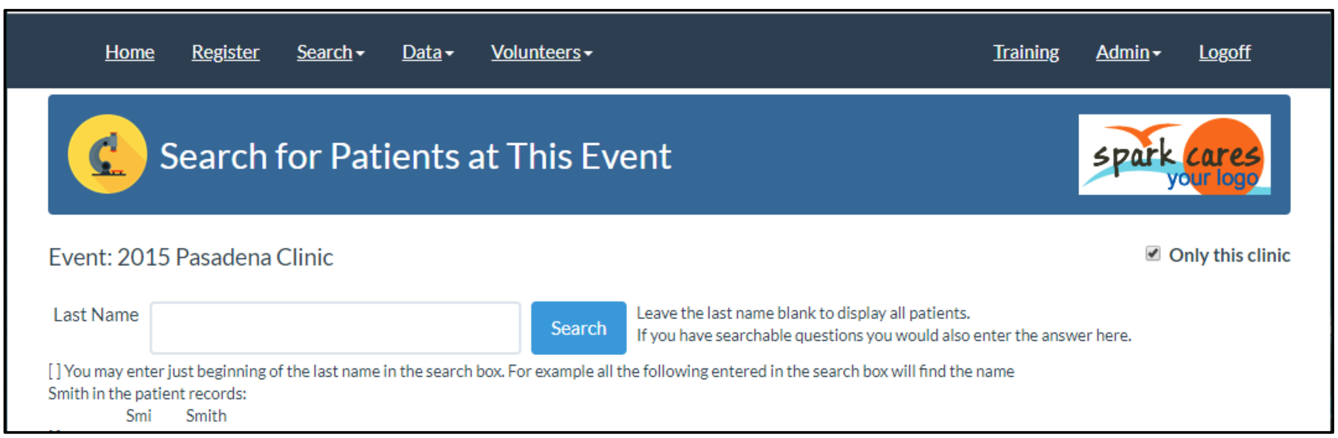
FINDING PATIENTS

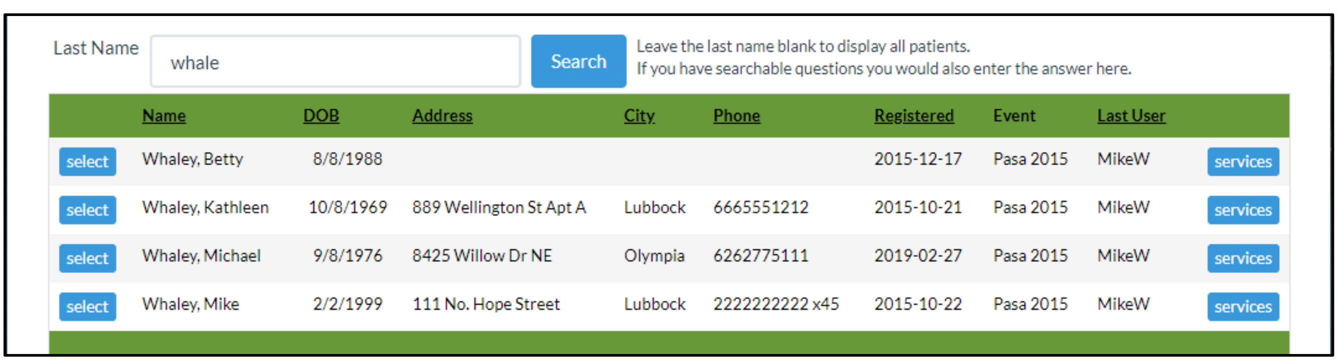
FINDING PATIENTS BY NAME

The main PaRIS menu has a SEARCH option. The first of the sub-menu options is to search BY NAME.



In the LAST NAME field you may actually type in their last name or their first name. If you press enter you will see a list of patients with partial matches.

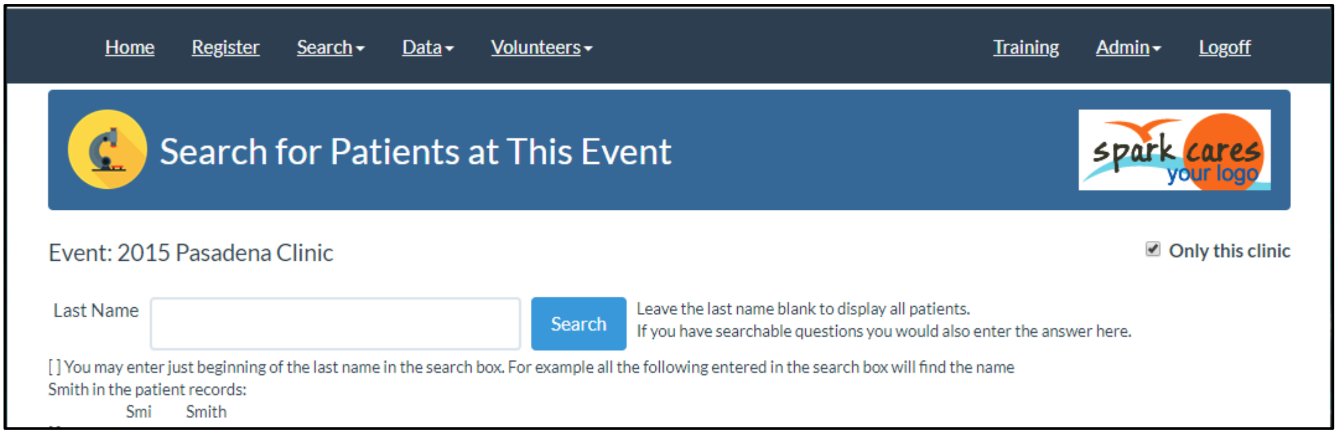



Last Name: whale — Search

Leave the last name blank to display all patients.
If you have searchable questions you would also enter the answer here.

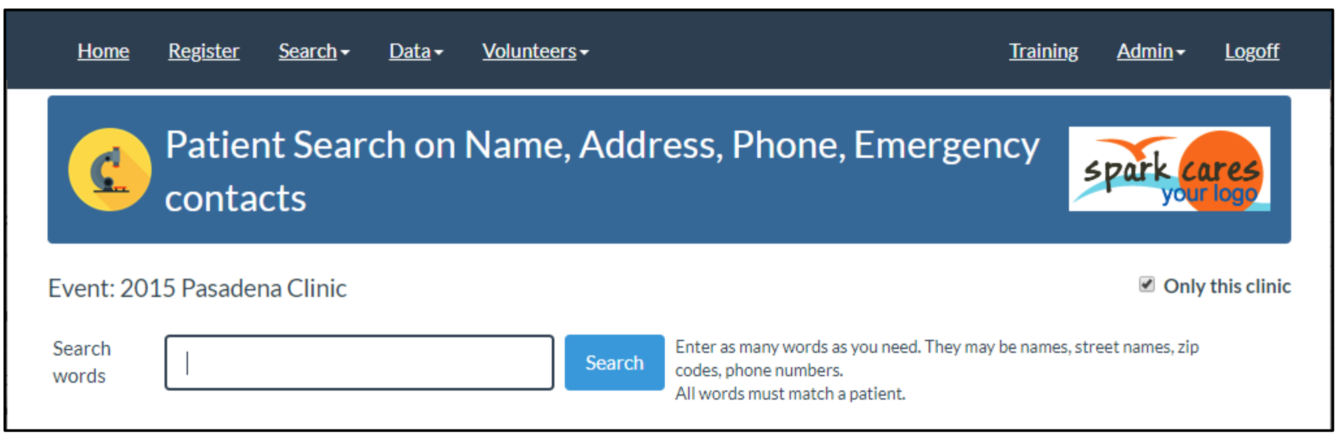
	Name	DOB	Address	City	Phone	Registered	Event	Last User	
select	Whaley, Betty	8/8/1988				2015-12-17	Pasa 2015	MikeW	services
select	Whaley, Kathleen	10/8/1969	889 Wellington St Apt A	Lubbock	6665551212	2015-10-21	Pasa 2015	MikeW	services
select	Whaley, Michael	9/8/1976	8425 Willow Dr NE	Olympia	6262775111	2019-02-27	Pasa 2015	MikeW	services
select	Whaley, Mike	2/2/1999	111 No. Hope Street	Lubbock	2222222222 x45	2015-10-22	Pasa 2015	MikeW	services

You may also use the handheld barcode scanner when you are on this page to scan the barcode on the standard patient label. This will find and open the patient detail medical history.



FULL TEXT SEARCH FOR PATIENTS

You may sometimes need to find a patient by phone number, address, or emergency contact. The second menu option under the SEARCH menu allows a full text search on all these fields.

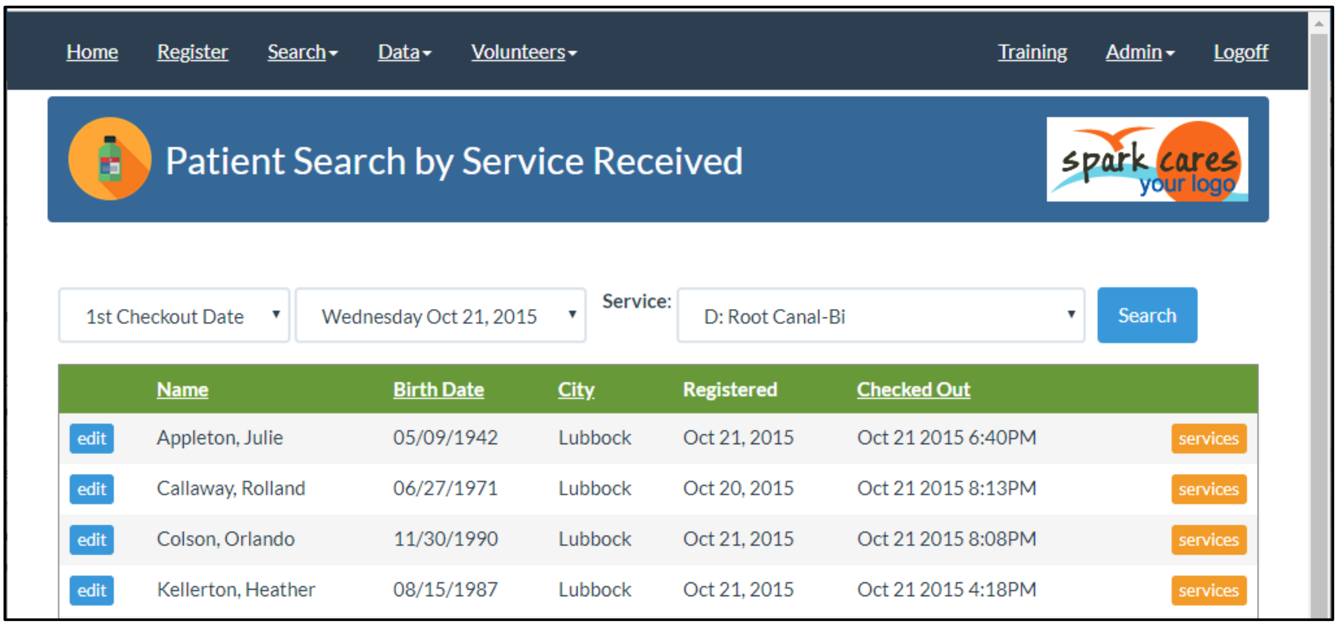


PATIENT SEARCH BY SERVICES

In some cases you may not have a good name for a patient by you know that they came in for a root canal on a certain date. You also may know the date they registered and/or the date the service was recorded.

The third option in the SEARCH menu is called BY RECORDED SERVICES.

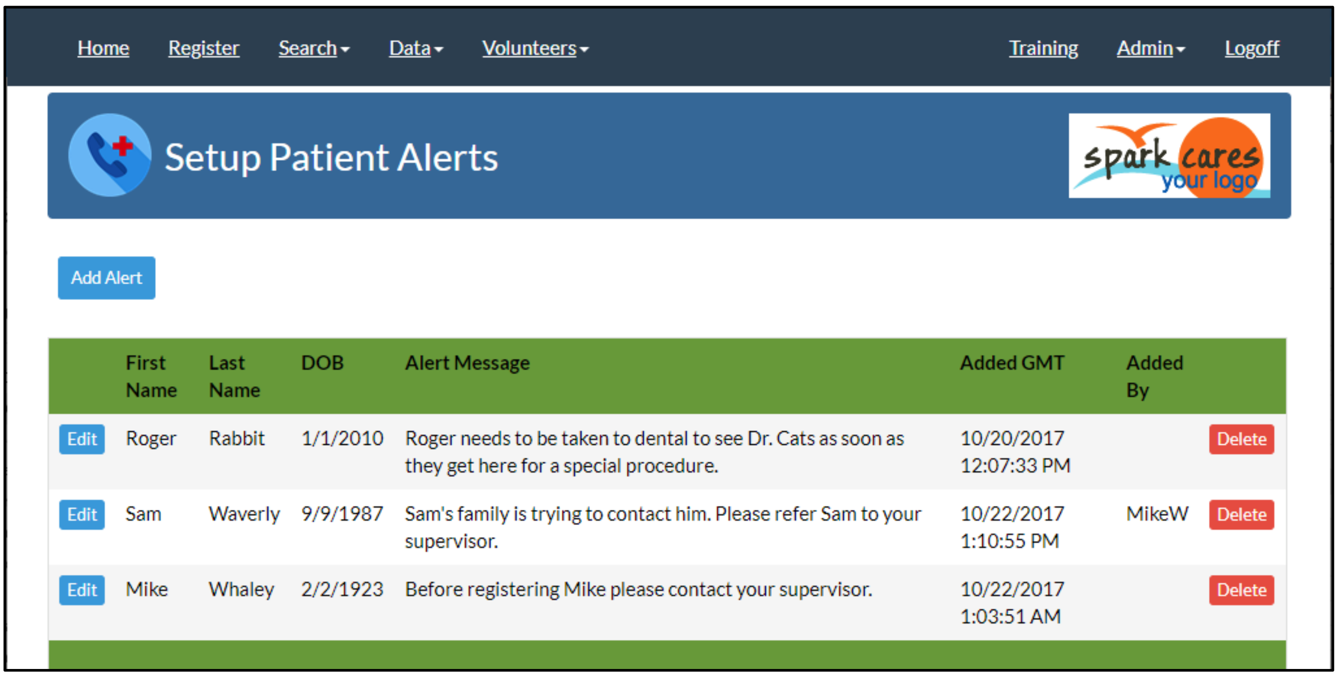
This allows you to specify the specific service and the date you need. You may click on the blue [EDIT] button to see their primary medical record or the orange [services] button to see the details about all the services they have received.



PATIENT ALERTS

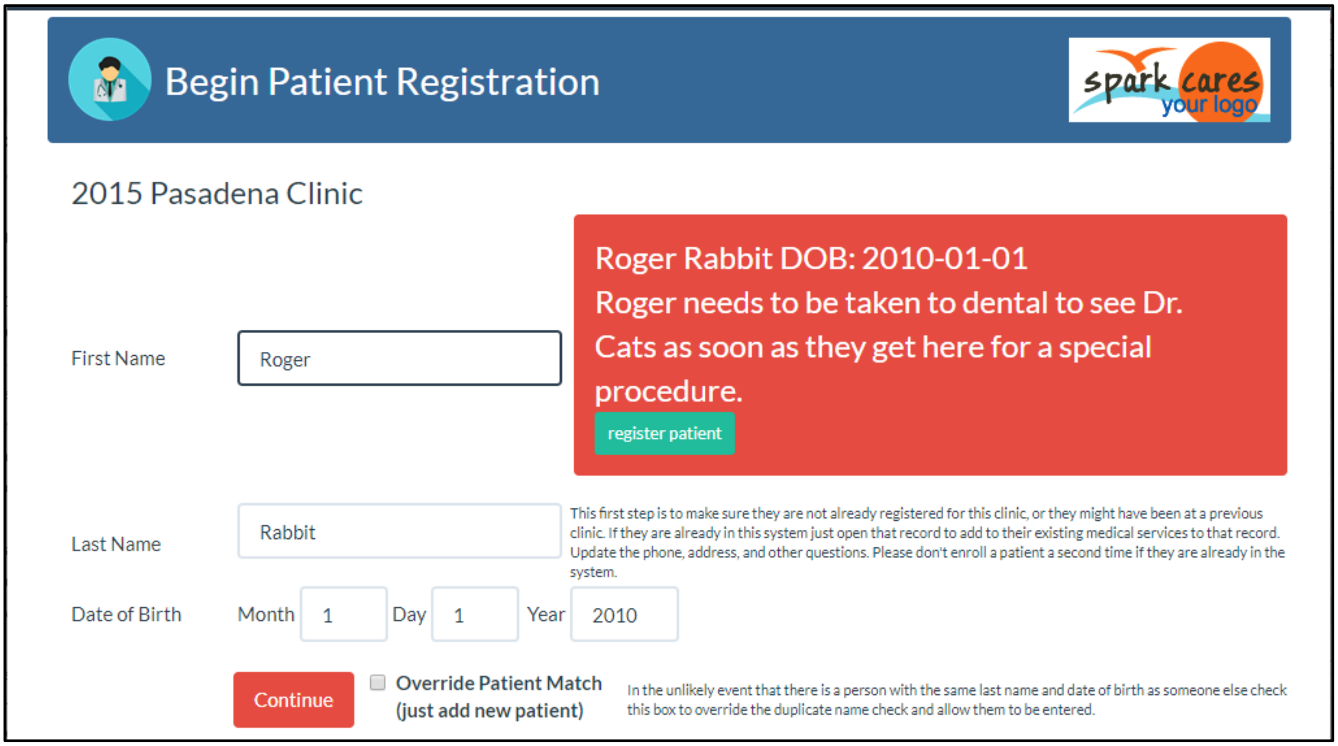
Sometimes you may want to have supervisors, specific doctors, or clinic coordinators notified if a patient comes into your clinic. This is done with Patient Alerts. Patient Alerts can only be setup by PaRIS Administrators.

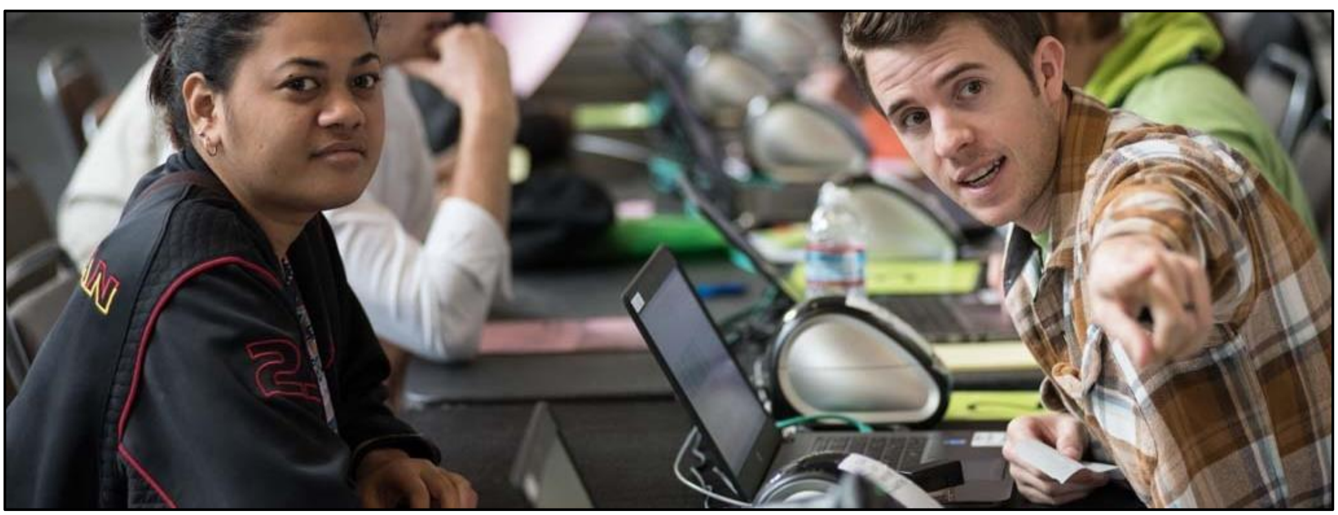
Go to menu   **Admin → Patient Alerts**



You will enter the patient first and last name, plus their date of birth. Then the message you want displayed. In most cases you don't want the message to contain sensitive information since anyone using PaRIS may see the message. If the topic is sensitive have the message indicate the PaRIS user should contact their supervisor.

When a patient registers for your clinic or their medical record is opened the alert message is displayed. You may have a problematic patient that needs some special handling or they may need something else. The message may be seen by any of the volunteers using the PaRIS system so the alert messages should not contain any sensitive information.





PATIENT PRINTED LABELS

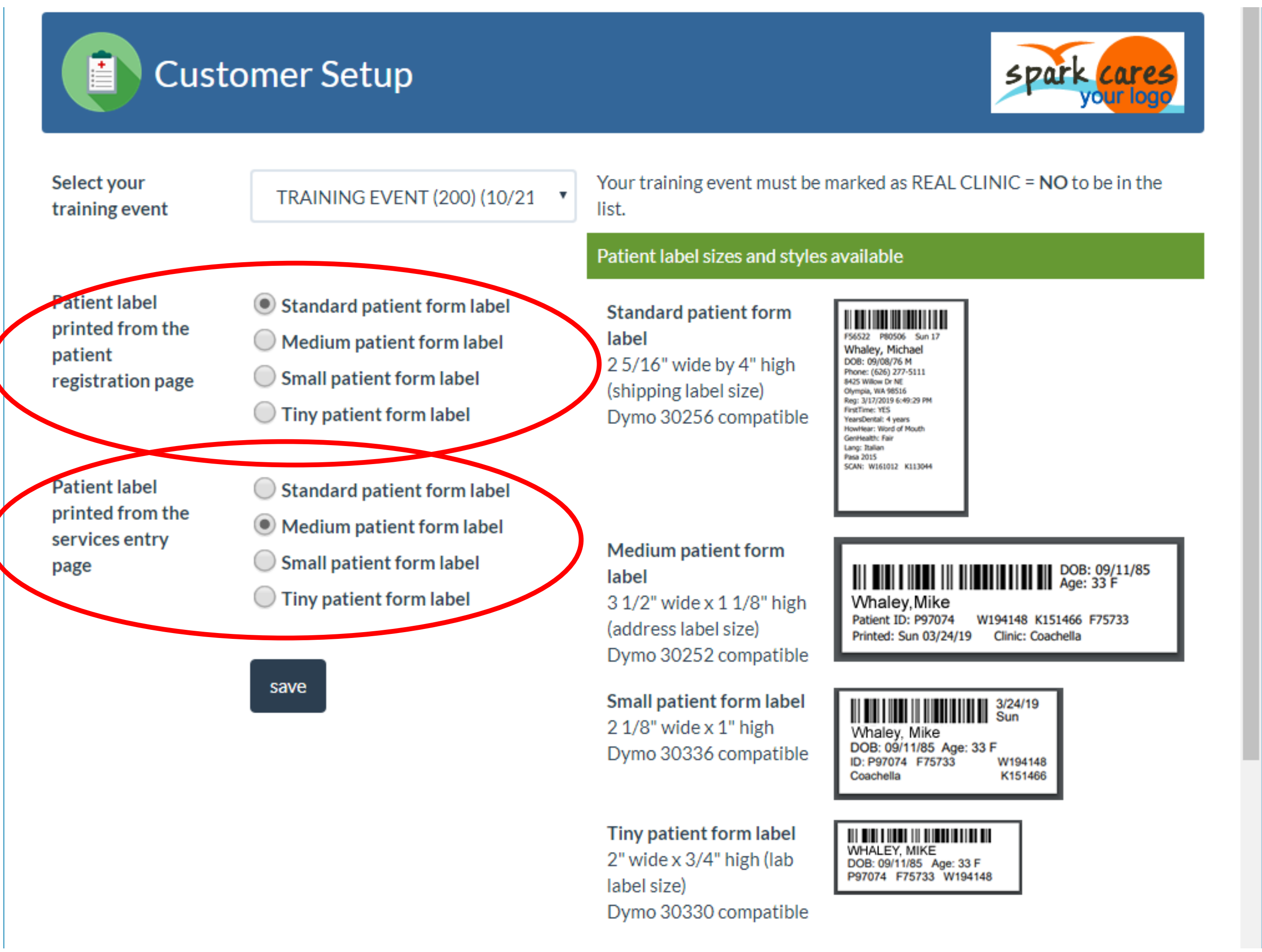
PaRIS does not print pre-printed forms. The design of PaRIS is that you design your own forms and then add PaRIS labels to the form in order for them to be *automatically* matched to the proper patient when uploaded into the PaRIS document management system. This gives you the flexibility to design your own forms and change them as needed.

You do have some options on which of the patient labels you want to use in different parts of the system.

CHOOSING YOUR PATIENT LABELS

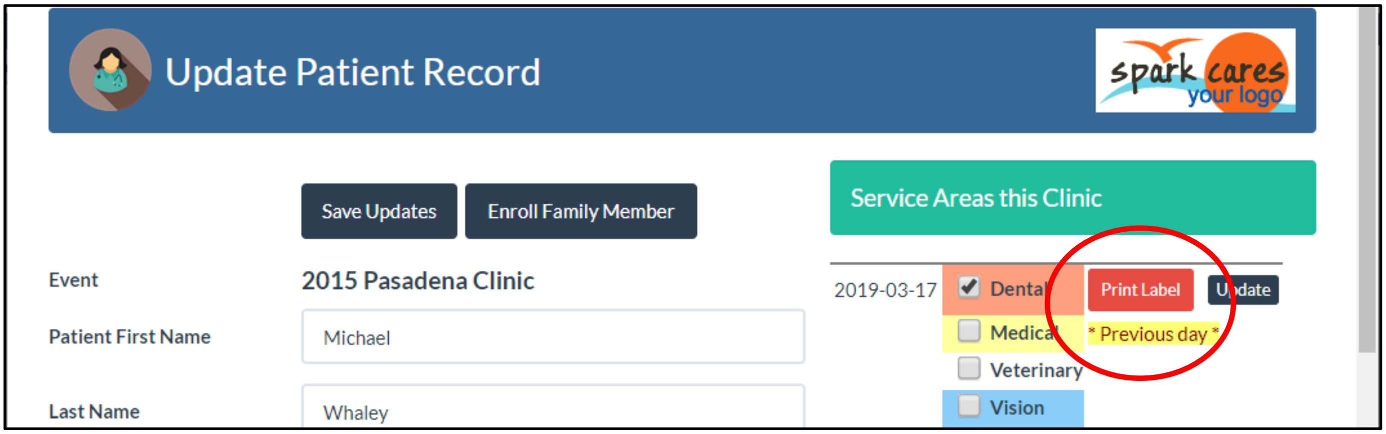
Within PaRIS you have a choice on which of the PaRIS patient labels print at two places in the system.

Under the Admin menu select the Customer Edit option. You will see the page below. You will see the opportunity to select your patient label at two places in the system. An example of each label is shown on the right hand side of the page.



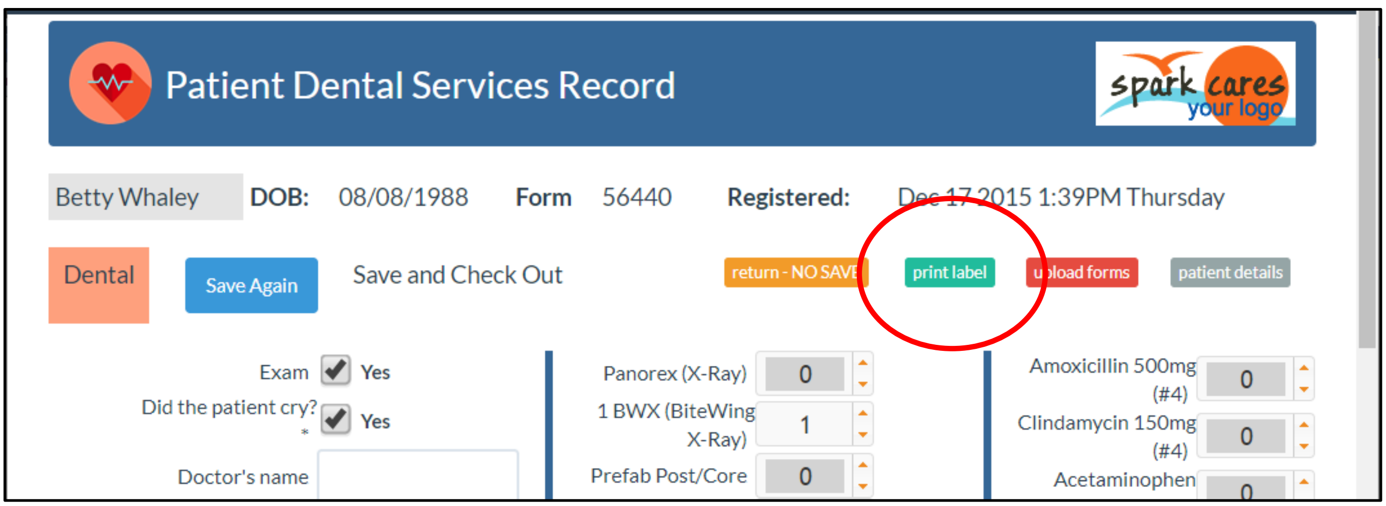
Patient label printed from the patient registration page

This is the label printed when registering a patient or updating their patient record. See the red button below.

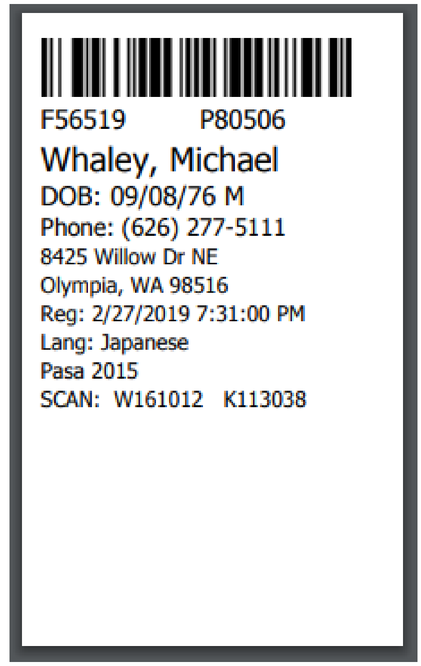


Patient label printed from the services entry page

This option defines what is printed when you use the green [print label] button when entering services for a patient. You may wish to print a smaller label to add to lab work going out or a smaller patient form.



STANDARD PATIENT LABEL


F56519 P80506
Whaley, Michael
DOB: 09/08/76 M
Phone: (626) 277-5111
8425 Willow Dr NE
Olympia, WA 98516
Reg: 2/27/2019 7:31:00 PM
Lang: Japanese
Pasa 2015
SCAN: W161012 K113038

The standard patient label is usually affixed to each patient form, or the first page of a series of patient forms. This contains the barcode to make services entry quick and a readable patient name, date of birth, phone, address and emergency contact information.

This standard label also contains the keywords that allow the paper form(s), when scanned (see the paper management section of this document), to automatically connect this document to the correct patient.

These labels are the Dymo #30256 format, shipping label. The are 2 5/16" wide by 4" high.

CUSTOMIZING THE STANDARD PATIENT LABEL

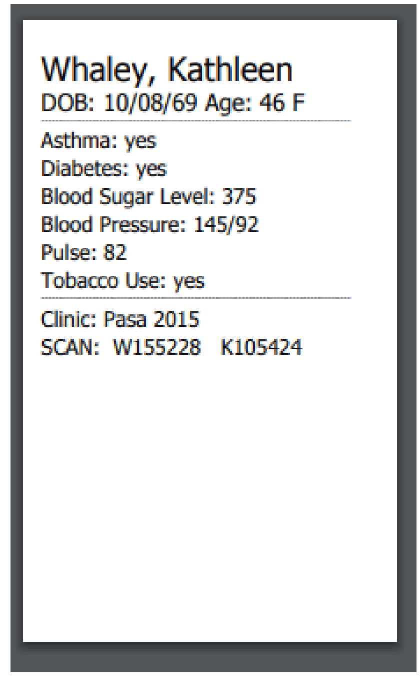
You have the control to remove some of the standard fields from the standard patient label. This control is by clinic. You may have a situation where you are using the patient label for more specialized clinics and needed more space for other information (patient questions) or just wish to hide the patient address at some of your clinics.

The following controls are in the Clinic Control page seen when you define or edit a clinic.

Determine what prints on the basic patient label. You may want to leave more room for patient questions.

Print Date of Birth on basic patient label?	☑ Print DOB on label?	Do you want the DOB printed on the patient label?
Print Calculated Age on the basic patient label?	☑ Print age on label?	Print the age of the patient based on the DOB on the date the label is printed?
Print the patient's address on the basic patient label?	☑ Print address on label?	
Print the patient's emergency contact information on the basic patient label?	☑ Print emergency contact info?	

MEDICAL HISTORY LABELS

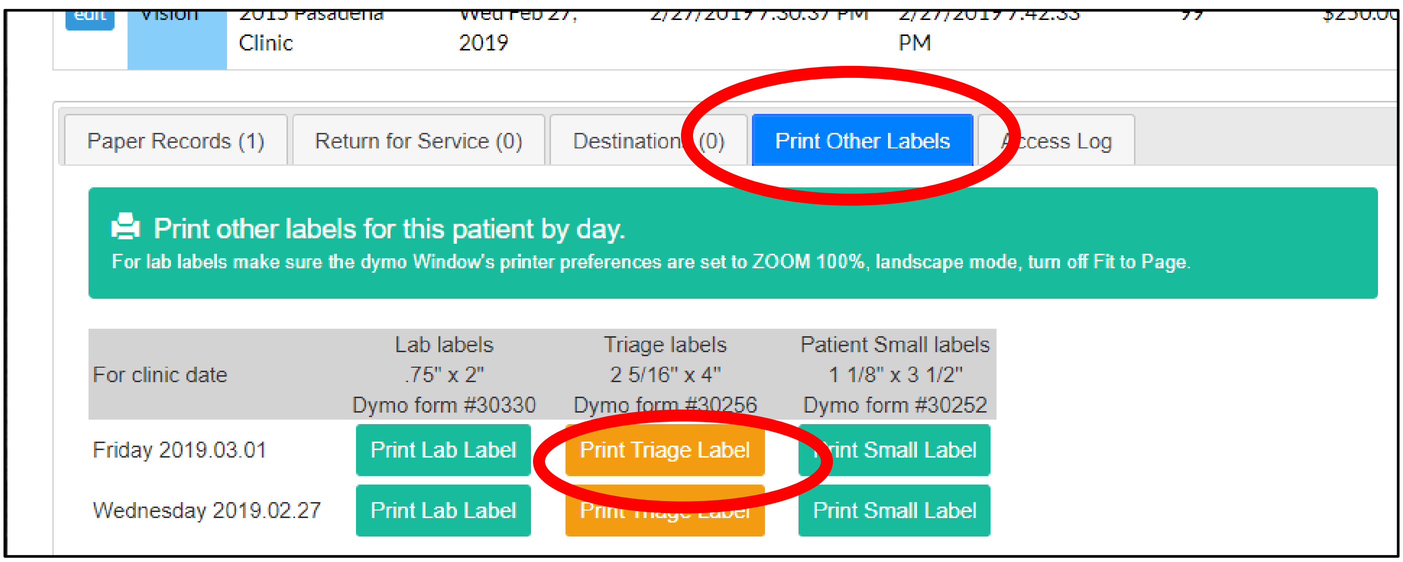


PaRIS also allows the printing of “triage labels” which contain all the General Services data recorded for a patient. These might be attached to other forms to carry forward any medical history information for the patient. This helps as the typical free clinic does not have PaRIS terminals located all over the clinic. Medical records are using kept on paper for most of the patient’s visit each day.

These labels are the Dymo #30256 format, shipping label. The are 2 5/16" wide by 4" high.

To print a triage label for a patient open a patient’s medical record and scroll down to the tab area. Click on the [Print Other Labels] tab as shown below. Click on the orange [Print Triage Label] button to print the general medical services, medical history, for that patient.

Since the general services values are carried forward the most recent triage label button will usually contain the most up to date list.

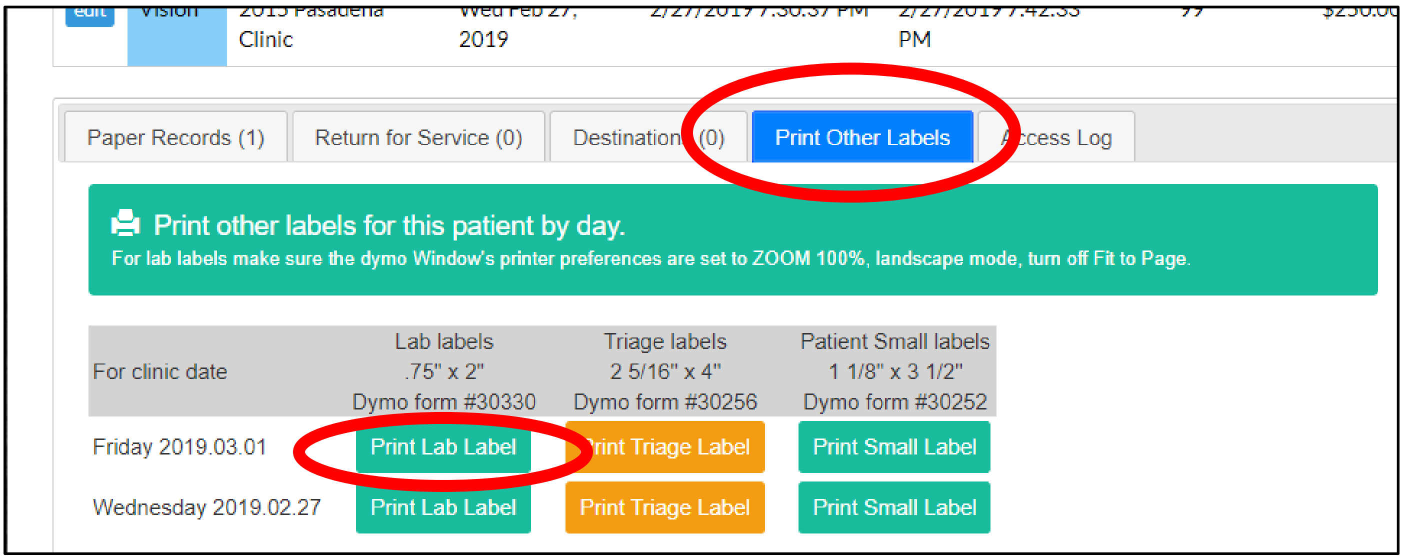


PATIENT LAB LABELS

These Lab Labels are smaller labels intended to go on boxes or envelops of items sent offsite for processes. These may be eyeglass prescriptions or bloodwork sent offsite for analysis.

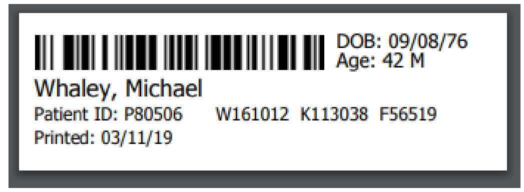
These labels are the small Dymo #30330 format. The are 2" wide by 3/4" high.

To print a lab label for a patient open a patient's medical record and scroll down to the tab area. Click on the [Print Other Labels] tab as shown below. Click on the orange [Print Lab Label] button to print the label.



It is always very important that you not setup the printing to "resize the label" when printing. This is seen in the print dialog box and can be set to NO in that printer's preferences. If you allow the printer driver to resize the data for the label then the barcode can be compressed and not work.

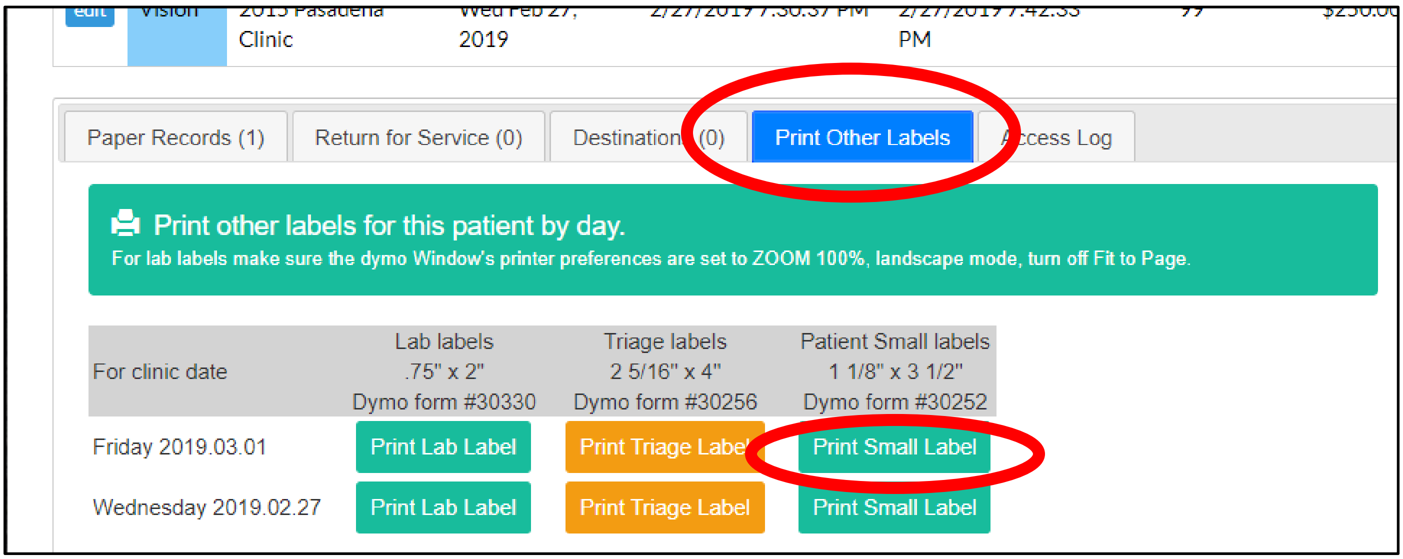
SMALLER PATIENT LABEL FOR PAPER FORMS



If you are printing a wide variety of patient records and do not have the space for the large shipping label sized patient standard label the system also allows you to print the smaller patient label.

These labels are the small Dymo #30252, address label. The are 3 1/2" wide by 1 1/8" high.

To print a smaller patient label for a patient open a patient's medical record and scroll down to the tab area. Click on the [Print Other Labels] tab as shown below. Click on the orange [Print Small Label] button to print the label.



This smaller label also contains everything needed to get the paper document scanned and automatically attached to the correct patient. So this may be printed and added to xrays, prescriptions, or other medical records.

It is always very important that you not setup the printing to "resize the label" when printing. This is seen in the print dialog box and can be set to NO in that printer's preferences. If you allow the printer driver to resize the data for the label then the barcode can be compressed and not work.

PAPER DOCUMENT MANAGEMENT – MATCHING PAPER TO PATIENTS

PaRIS provides an easy and secure way for you to manage your paper patient records. The system supports an unlimited number of patient documents and automatically connects uploaded documents to the correct patient. These documents are encrypted and easily accessible. In most cases this is a complete replacement for shelves of paper records.

ADDING PAPER DOCUMENTS TO A PATIENT'S RECORD

Importing documents is a two-step process. The first step is scanning the documents into PDF files. JPG images may also be used but using the PDF format allows you to combine multiple pages, and front and back, into a single stored document.

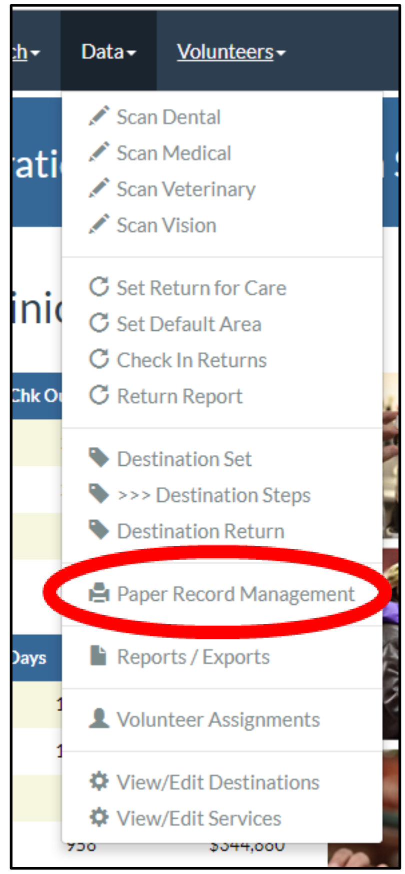
The best practice is to scan all the documents, front and back, for an individual patient's day of service in an area into a single multi-page PDF file. The name of the file does not matter, it just needs to be unique (the system checks for duplicate files). Most paper scanners have an automatic file numbering process. This keeps all the records together and makes it easier to match all the documents to the correct patient.

Example:

> A patient came into a clinic and had dental services and also vision services. They received a dental form and a vision form and both of these two forms had a standard PaRIS patient label (#30256) stuck on the front page of the form. (The back would also work). In dental they also got an x-ray printed and in vision they were given a paper vision prescription.
>
> The double-sided dental form and dental x-ray would be scanned into a single PDF file.
>
> The double-sided vision form and vision prescription would be scanned into a second PDF file.

The next step is to upload those two documents into the system. See that section.

STEP TWO – UPLOADING THE SCANNED PDF FILES INTO PARIS



Under the DATA menu select the Paper Record Management option. You will see the screen shown below.

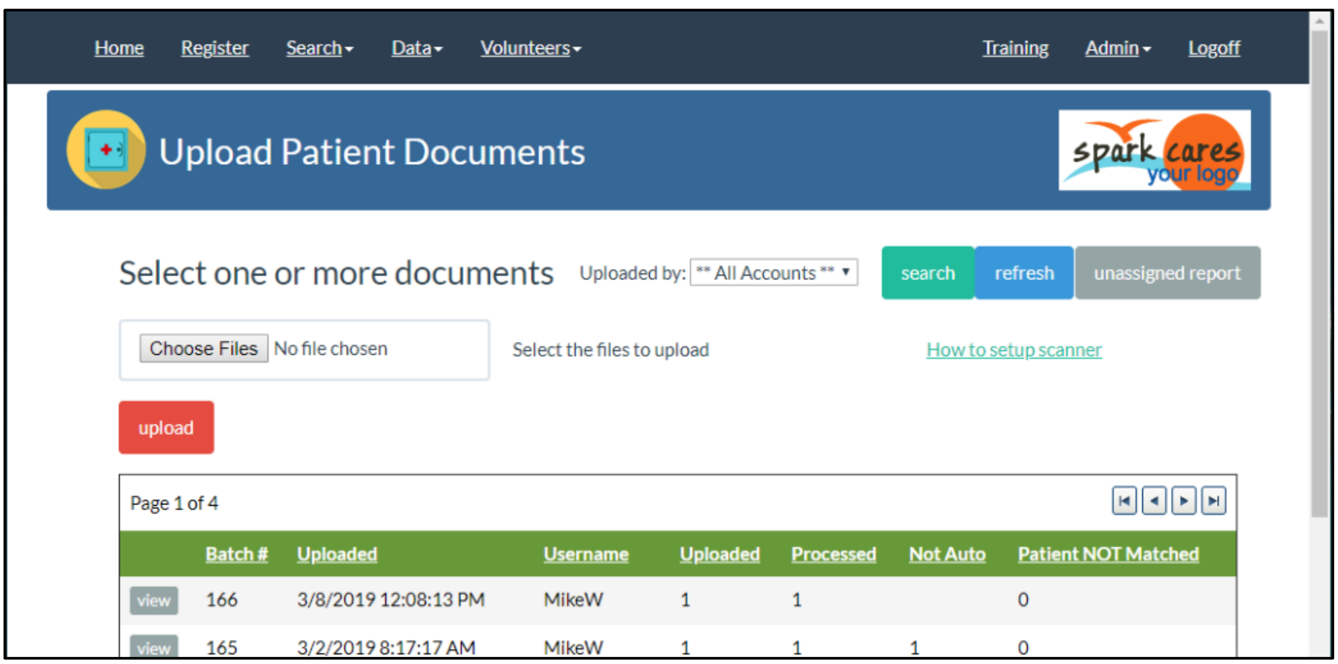
The normal routine would be to upload 25 to 50 PDF files at a time. If things are not busy you can always upload them individually, or if things are really busy upload them all at the end of the day.

Click the [Choose Files] button and select your PDF files (or JPG images if from some other source like an x-ray machine. Select all the PDF files you wish to upload.

Then click the red [UPLOAD] button.

The system will check for duplicates and give a quick report on the documents that if found.

Each upload creates a “batch” of files to be processed.



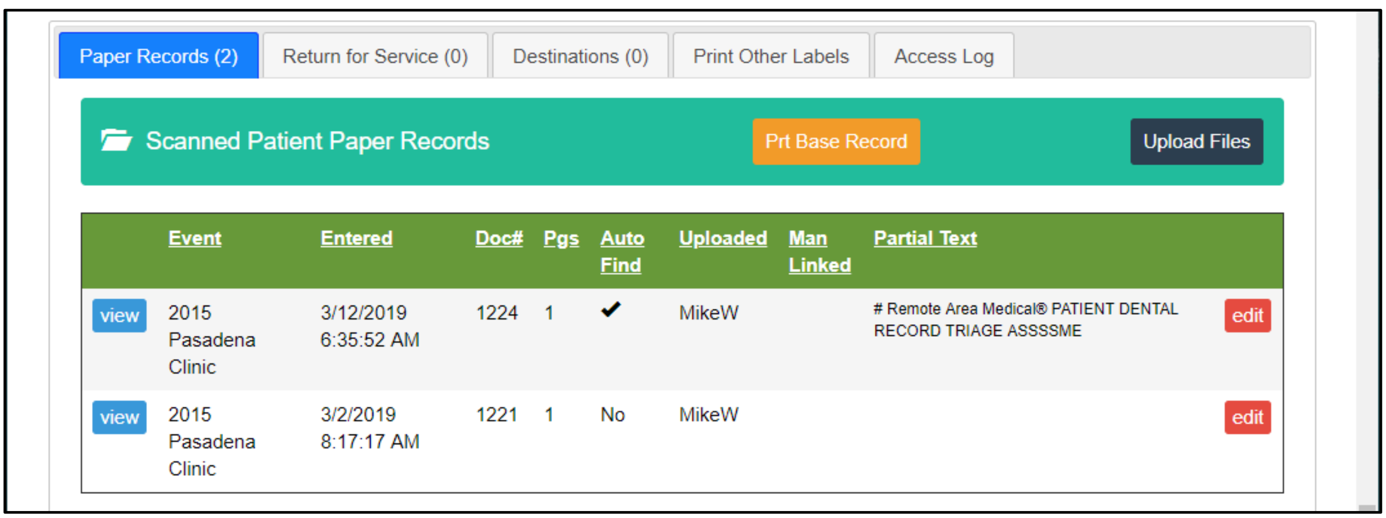
DIRECTLY UPLOADING DOCUMENTS TO A PATIENT, BYPASSING AUTOMATIC MATCHING

On occasion you may have a document, such as an x-ray or medical prescription, and you need to quickly upload it to a patient's record when it doesn't have a PaRIS patient label on it. This can be manually matched (see that section of this document) but it may sometimes be more convenient to just upload the document directly into the patient's record. This can be done from two places in PaRIS. The first is the main patient record, the second is the services entry page.

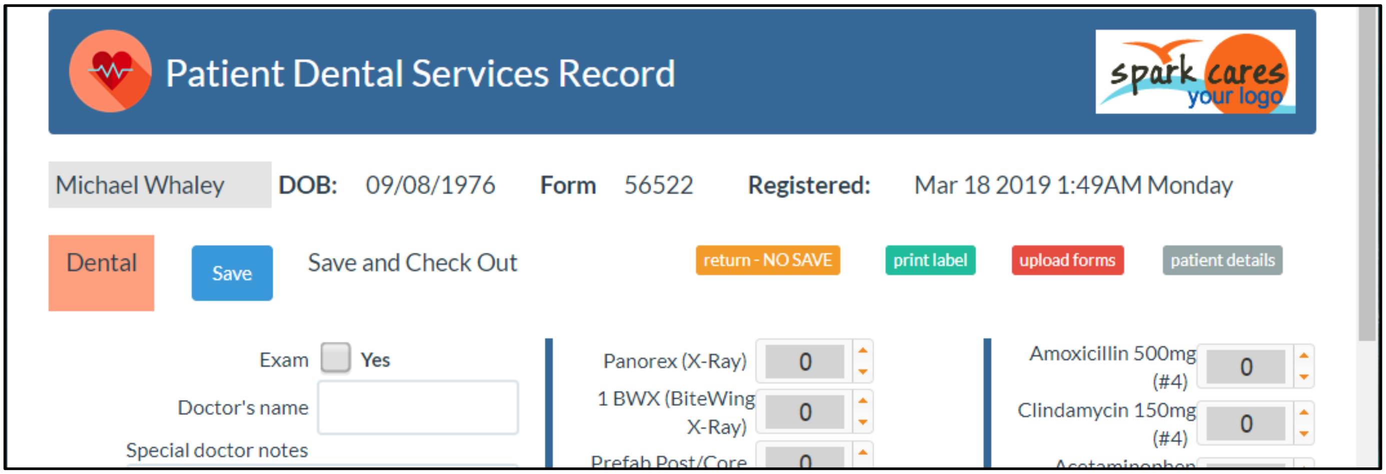
This may come in handy for things like x-rays. X-rays may already be image files. At the x-ray station, with PaRIS also running, the generated x-ray can immediately be uploaded to a patient's record without it needing a label.

UPLOADING DOCUMENTS DIRECTLY TO A PATIENT'S RECORD FROM THEIR MAIN MEDICAL RECORD PAGE

Toward the bottom of the patient's medical record page is the following section. The first tab shows their uploaded paper records. On that page is the button [Upload Files]. Click that to get to the page to upload documents directly into their patient record.



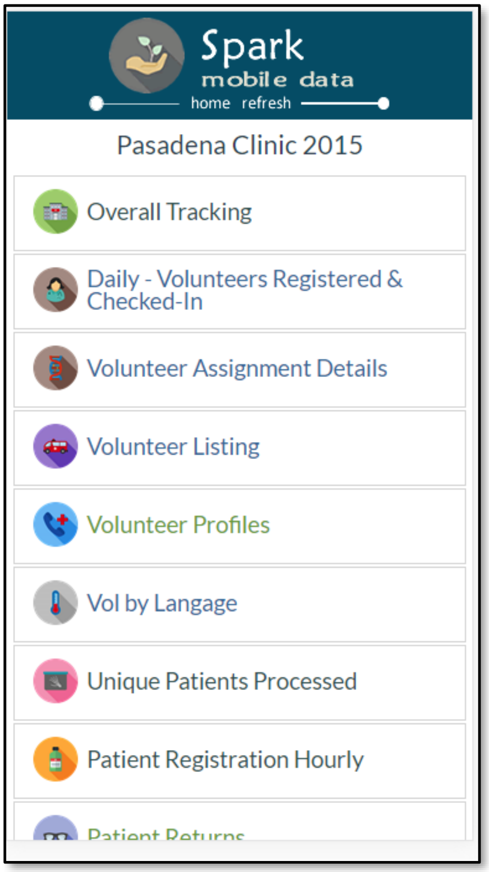
When you are entering services for a patient you may also then upload some of the documents you are reviewing directly into their record.



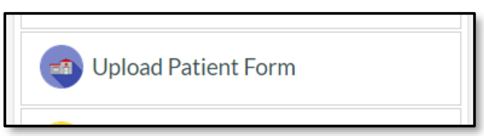
UPLOADING PATIENT DOCUMENTS WITH A MOBILE PHONE

If you open your Spark mobile web app you are able to upload a patient paper form directly from your mobile phone. This is helpful when your clinic has issued a prescription to be filled offsite and the patient is leaving with the paper. Or they have to leave early and want to take their dental x-ray with them.

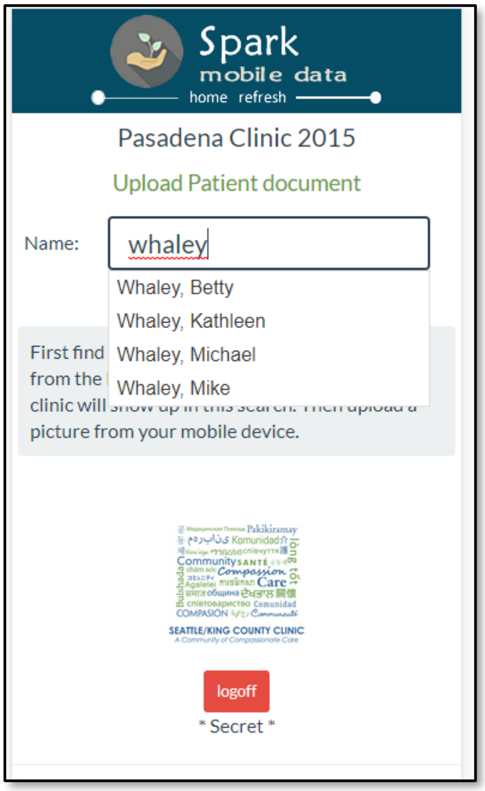
The first step is to open your mobile web app, usually your website followed by "/mobile", and logon.

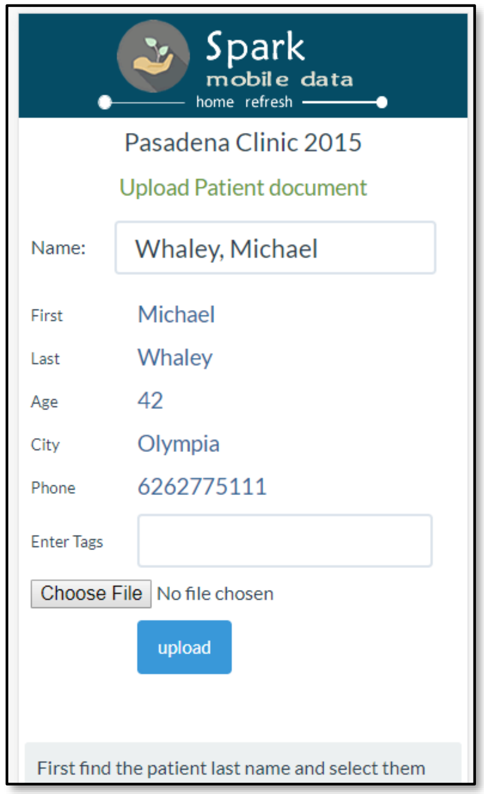


Scroll down to the menu item "Upload Patient Form".



Begin typing in the patient's last name and the list of patients with that name at the selected clinic will appear. Select their name from the list and a few specifics about that patient will appear so you can make sure it is the correct patient.

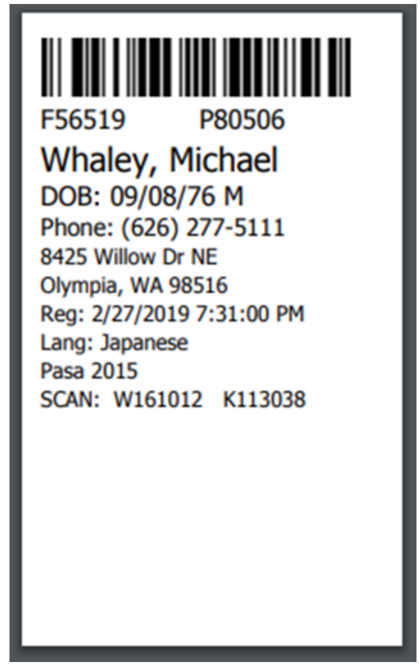




Then click the [Choose File] button and select the image from your phone of the patient document.

The document will be uploaded to the patient's record and immediately accessible.

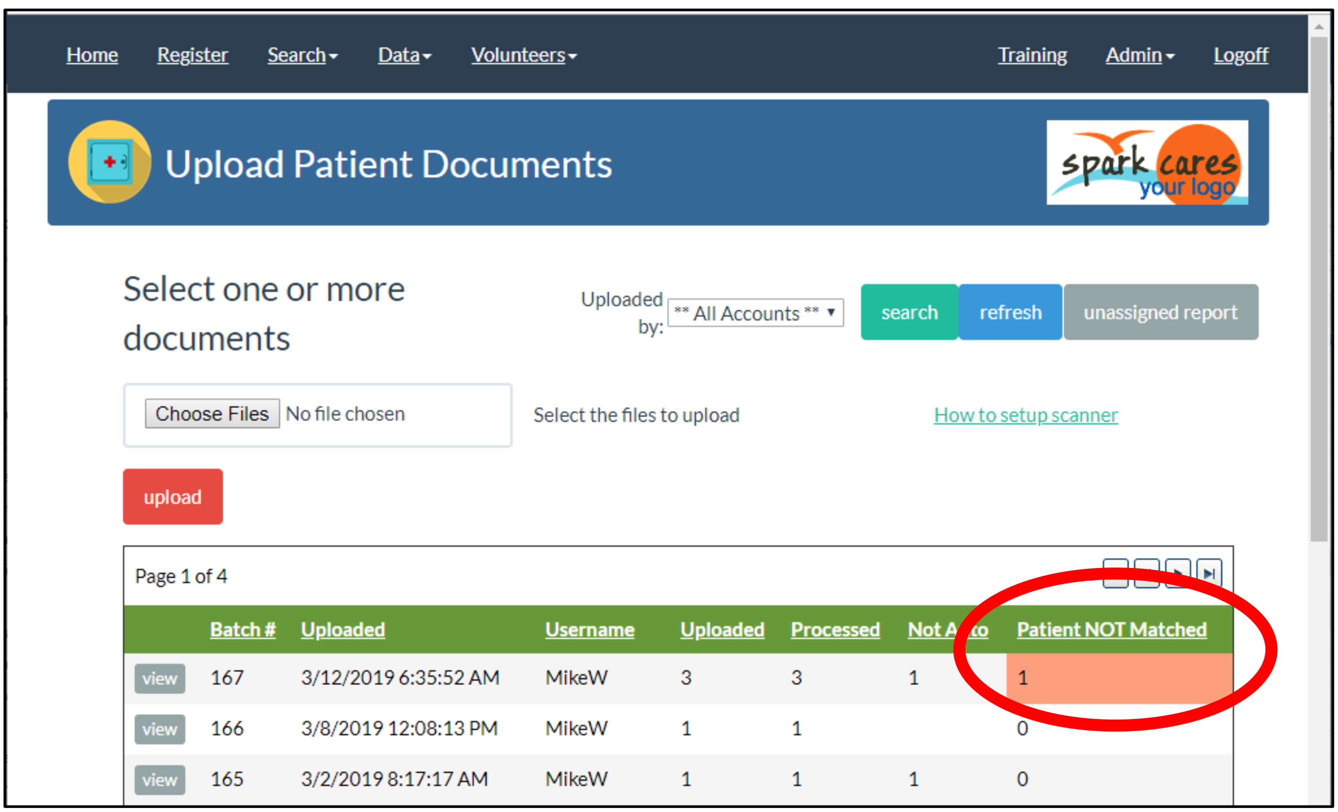
CONNECTING SCANNED/UPLOADED DOCUMENTS TO PATIENTS



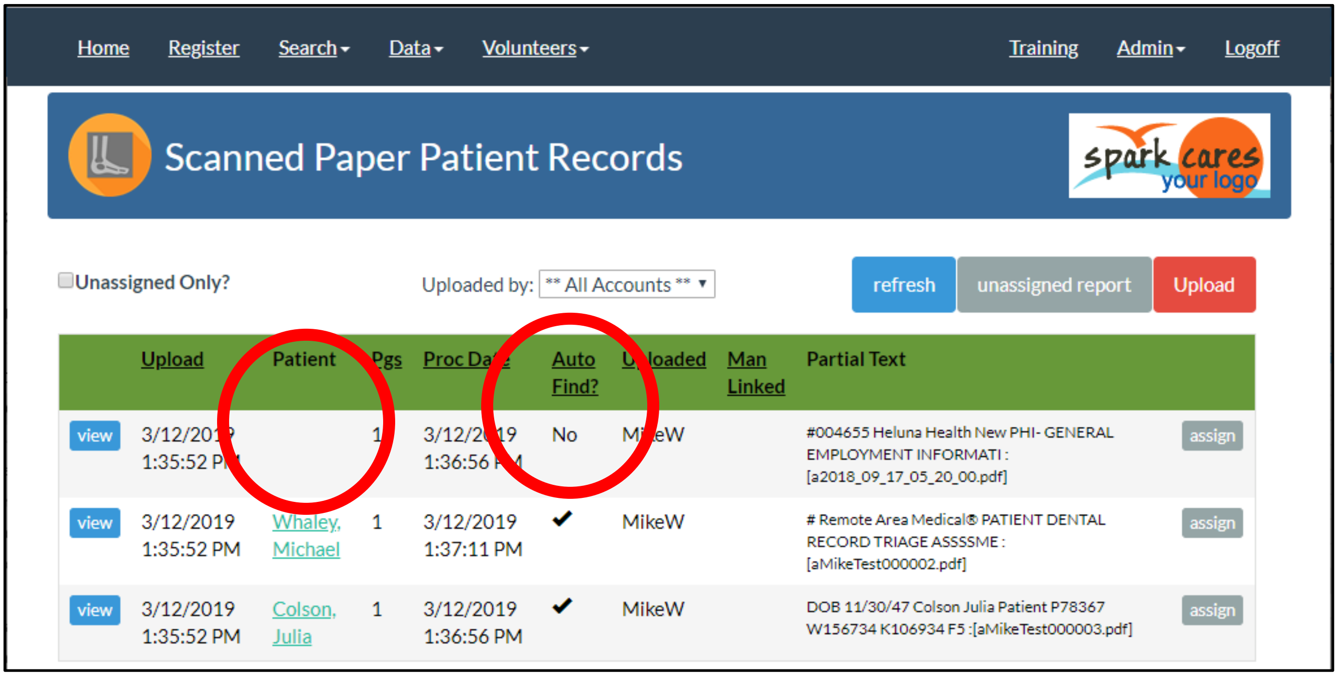
99% of the time patient forms & papers with a standard patient label on them, or the smaller patient label, will be automatically connected to the correct patient. Just upload the documents and PaRIS does the matching (it can take up to 15 minutes for the matching to take place). However, in some cases you may have damaged forms, coffee stains, torn pages, or pages without a patient label. In this case you will need to manually connect the uploaded files to a patient.

Note that the best practice is to scan all the patient paperwork from one service area into a single PDF file. This means taking the patient's dental form, dental x-rays, and dental prescriptions and load them all into the ScanSnap paper scanner at the same time. This creates one PDF file and then PaRIS only needs to find the standard patient label on one of the pages to match the whole file to the correct patient.

If an uploaded file is not automatically connected to a patient you will see the red highlighted number "Patient NOT Matched" as seen below.



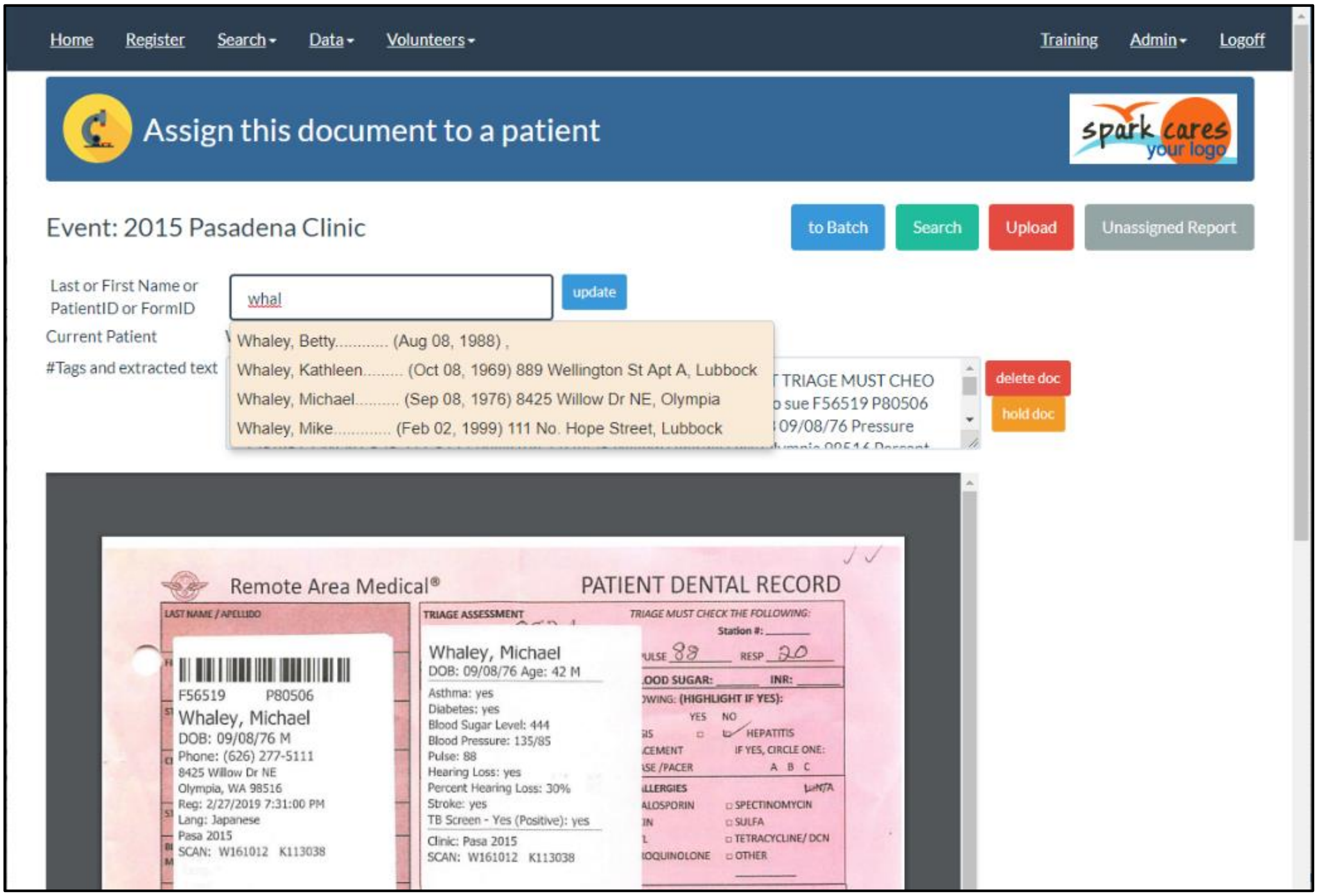
Click on the gray [VIEW] button next to the document upload batch with the unconnected patient files. You will see the batch files displayed.



In the above example, three files were uploaded and one of them was not automatically matched to a patient. The Patient name is blank and Auto Find is NO.

To resolve this, click the [ASSIGN] gray button and look over the uploaded document. Files should have the patient's name or you may be able to read part of the patient label. Prescriptions may have a hand-written patient name. X-Rays may have a patient name on the border.

Type in the patient's name and as you do PaRIS will popup matches showing the names, date of birth, and address to help you select the correct patient. Click on the correct patient in the list and the file is connected.



AUTOMATIC PATIENT MATCHING USING THE DOCUMENT FILE NAME

In some cases you may be generating documents from an x-ray machine or some other process and have some control over the file name. You may always just put a patient label on the front or back of a form but in some cases the actual patient document may only be electronic and not on paper. These files may also be uploaded into PaRIS and automatically matched to a patient with the following rules.

The file name will need to be in one of three formats. Case does not matter in these formats. The "-" does matter. The forms are only matched to patients at the currently connected clinic.

Filename looking like: PaRISDoc-P27711-anything-here.PDF or JPG

> The phrase PaRISDoc- followed by the P number (P and the patient number). The patient's P number can be found on all the patient labels.

Filename looking like: PaRISDoc-F155366-anything-here.PDF or JPG

> The phrase PaRISDoc- followed by the Form number from any of the patient's forms with a PaRIS label. This is the letter F followed by a number.

Filename looking like: PaRISDoc-name-Firstname-LastName-anything-here.PDF or JPG

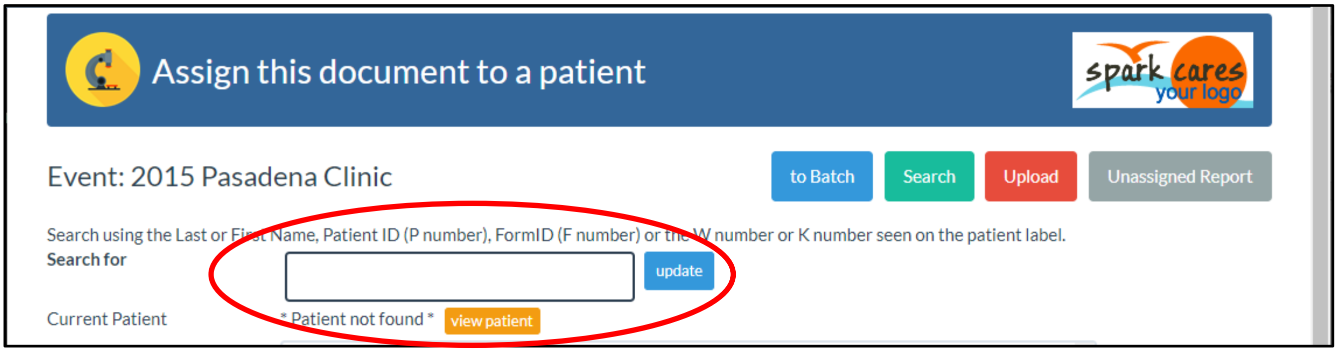
> If the file name is preceded by "parisdoc-" then we skip a word and look for the patient first name and then last name. These may actually be in any order, last then first or first then last. While case for the names does not matter the match must be exactly what is in the patient's medical record and the patient must be registered in the clinic you are using.
>
> The second word is skipped in this format. If the file name is under your control you may use two of the formats at the same time combining the P number of F number method with the name matching method.

If the file name is preceded by "parisdoc-" but there is no match with the other values then the normal OCR text extraction and patient matching is attempted.

The form type matching is still handled in the same way.

THERE ARE OTHER WAYS TO MANUALLY MATCH PATIENT DOCUMENTS.

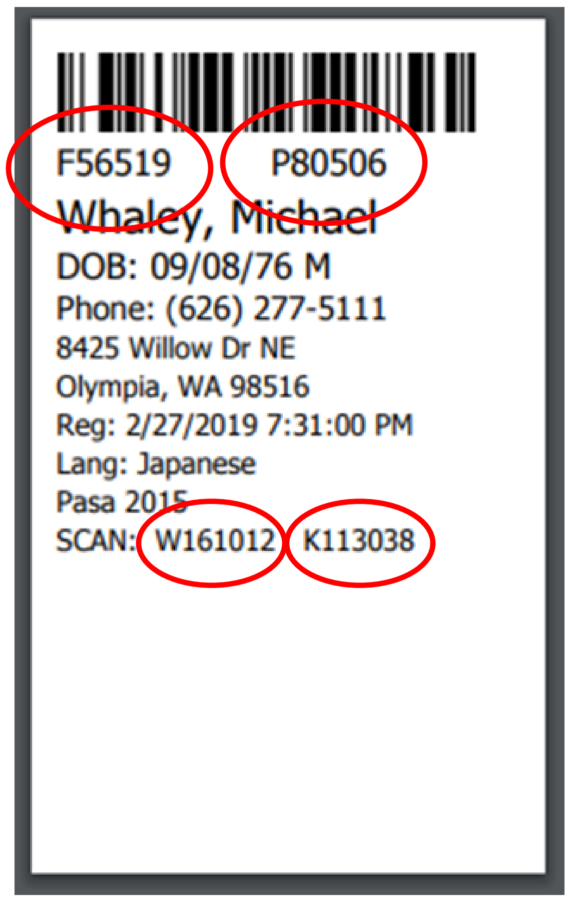
Patient documents may be matched by typing in the patient name but also by any of the associated patient record numbers shown on the patient label. In some cases the form may be damaged and you can't read the patient name.



You may also enter:

- The P number – this is the patient identification number.
- The F number – This is the patient form number.
- The W number
- The K number

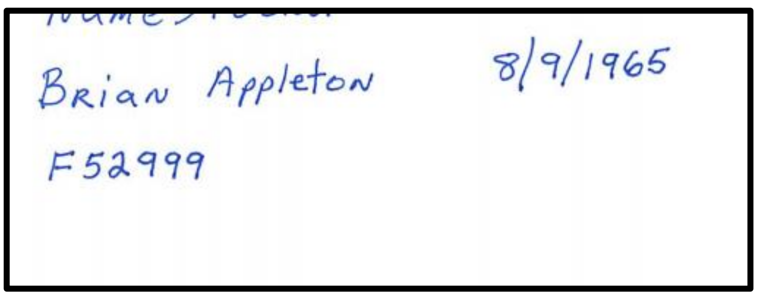
Enter these values and press <enter> or click [update].



HANDWRITING RECOGNITION

The new PaRIS document management software will now sometimes recognize printed handwriting as well. You may print the patient's full name and date of birth on the document and PaRIS will attempt to match on those values. You may even write the form numbers and patient numbers on the document.

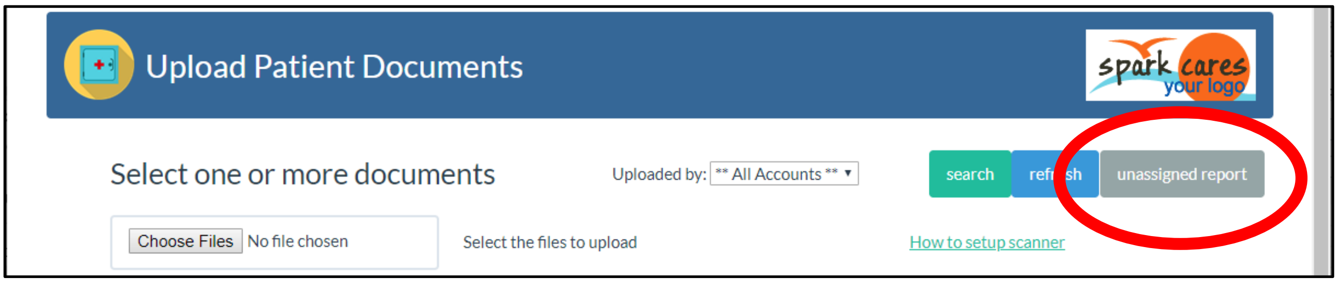
This is not highly reliable. The document shown below is an example of handwriting which was successfully recognized and used to match the document to the patient. We would not count on this working. A PaRIS patient label is always going to be much more reliable. But this may be useful if you are out in the field, away from laptops and printers, and are providing services and collecting forms then this may help.



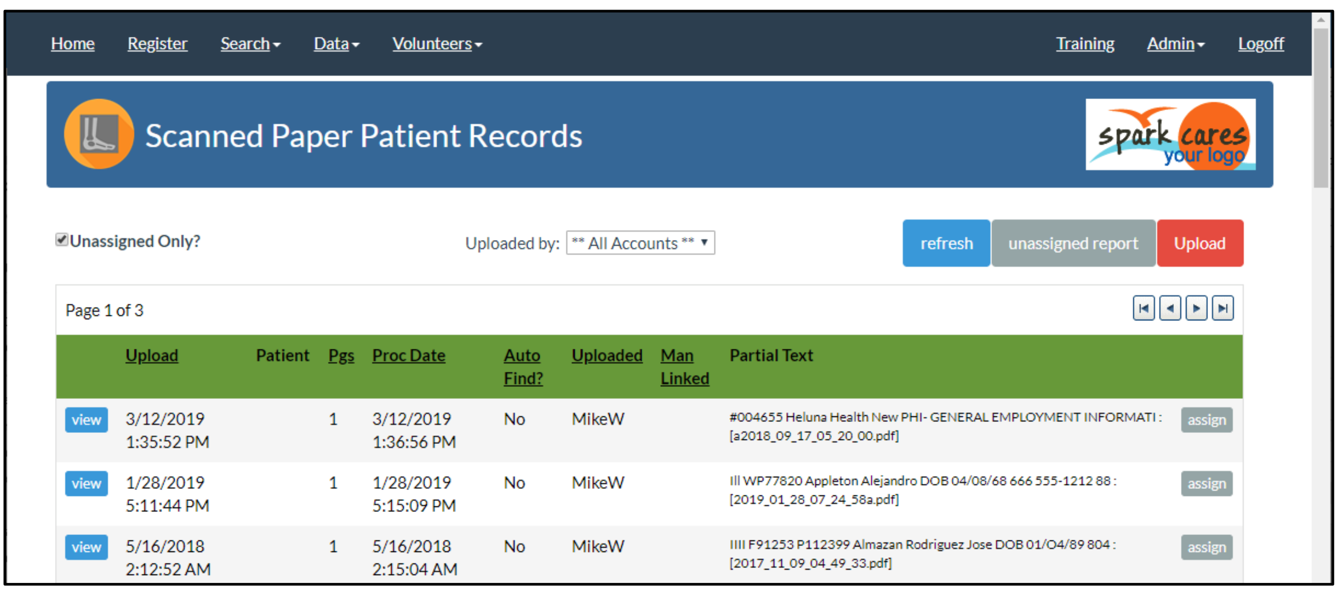
REVIEWING ALL YOUR UNCONNECTED UPLOADED PATIENT FORMS

Uploaded patient forms are processed and connected to patient records in the background. At larger clinics processing 1000 patients per day this can take more than 15 minutes from the time of the upload. Therefore, you are not typically waiting to see if any records are not automatically matched.

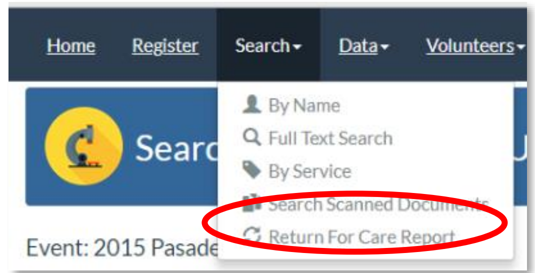
When one of your volunteers has the time, even if days later, they can click on the Unassigned Report button (in gray below) and see a list of all the documents not yet connected to patients.



You will then see the complete list, for the active clinic, of all the unconnected documents in all the batches. It is quick to go down the list clicking the [ASSIGN] button connecting them to the correct patient. See the section in this document on connecting documents with patients.



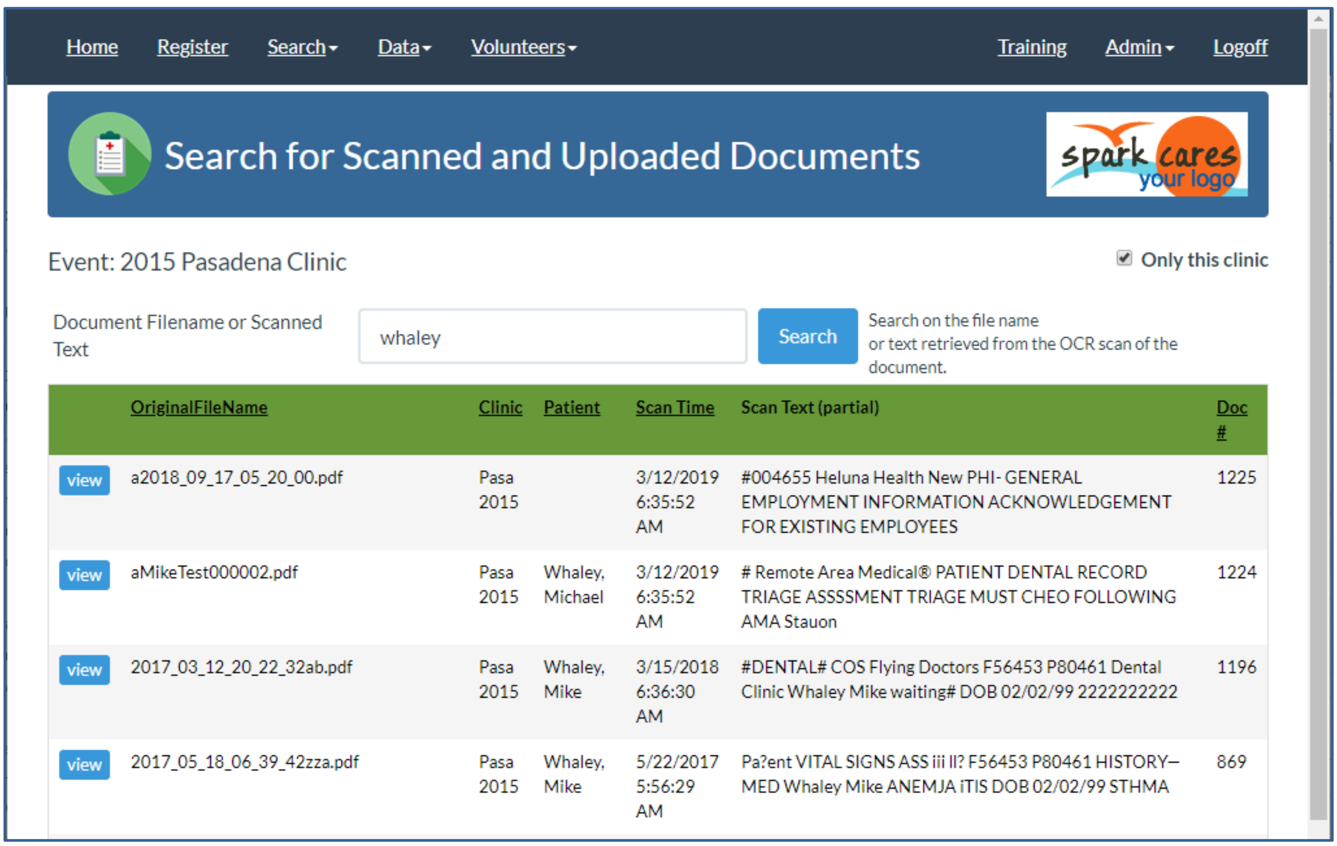
FINDING SCANNED PATIENT DOCUMENTS



Most of the processing of scanned documents is fully automated. Scan and upload your paper patient records and they are automatically processed and connected to the correct patient. So finding a document is just finding the patient. But sometimes you will find documents on your computer and you don't know if they have been processed or a message that they are "duplicate" file seems incorrect.

PaRIS allows you to search for files by filename, partial filename, or by any of the text information extracted from the document.

Under the Search menu item there is an option for Search Scanned Documents.



Being able to track down all the files in the system can help you solve some problems. For example, some of your volunteers may think they uploaded some forms/files but they can't find them.

PAPER DOCUMENT MANAGEMENT – IDENTIFYING THE TYPE OF FORM

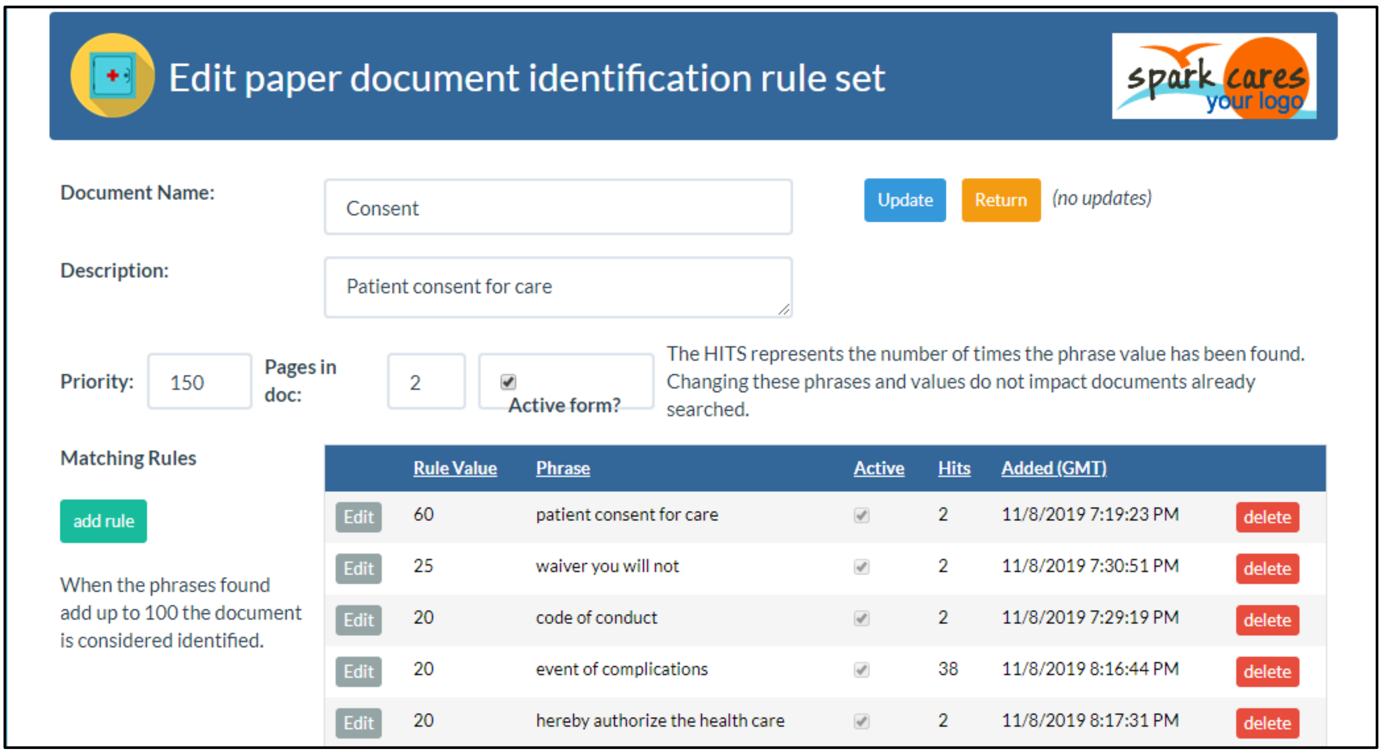
The PaRIS system now attempts to automatically determine the type of documents uploaded. These may be dental medical forms, patient consent forms, prescriptions, x-rays, lab work, eye glass orders, immunization records, etc… The form name (you define) is then displayed in the patient's medical record to help you more quickly find the needed paper medical records.

PaRIS does this by a set of defined rules. PaRIS users need to define the descriptions of their documents by defining a set of unique phrases that can be found on each document. Any number of phrases may be defined along with a score for each phrase. When the document's text is scanned and phrases are found, if the sum of the scores is 100 or greater then the document is considered a match and the form is identified as being in the uploaded file.

An uploaded file may contain any number of forms. For example an uploaded file (PDF) may contain the patient consent form, dental form, and a prescription. Each uploaded file may contain any number of forms.

DEFINING A FORM TO BE IDENTIFIED IN PARIS

Open the Admin menu and click on Doc Identification. Click on [Add Document]. You will see the following.


Edit paper document identification rule set

Document Name: Consent

Update | Return | (no updates)

Description: Patient consent for care

Priority: 150 | Pages in doc: 2 | Active form?

The HITS represents the number of times the phrase value has been found. Changing these phrases and values do not impact documents already searched.

Matching Rules

add rule

When the phrases found add up to 100 the document is considered identified.

	Rule Value	Phrase	Active	Hits	Added (GMT)	
Edit	60	patient consent for care	✔	2	11/8/2019 7:19:23 PM	delete
Edit	25	waiver you will not	✔	2	11/8/2019 7:30:51 PM	delete
Edit	20	code of conduct	✔	2	11/8/2019 7:29:19 PM	delete
Edit	20	event of complications	✔	38	11/8/2019 8:16:44 PM	delete
Edit	20	hereby authorize the health care	✔	2	11/8/2019 8:17:31 PM	delete

The Document Name is what will show up in reports and in the patient's medical record.

Priority: This is the priority that the document name is listed when multiple documents are found in a file. So if both "Dental Form" and "Dental x-ray" documents are found they are listed in priority order.

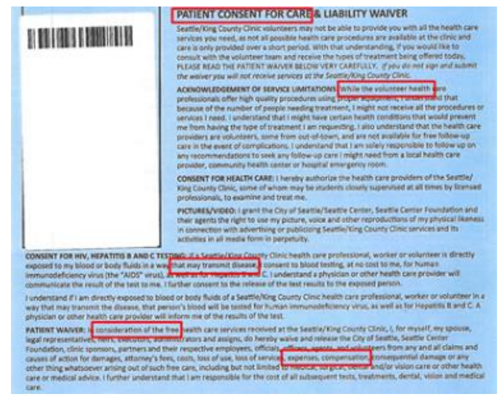
Pages in doc: This is the number of pages to expect when the document is found. If the form is a single page 2 sided document then the number is 2.

Next you enter the phrases which will identify the form. Set the Rule Value depending on how unique the phase is in your documents. It is OK for a phrase to appear in more than one form as long as the combination of phrases you select will uniquely define the form when the matching phrases add up to 100.

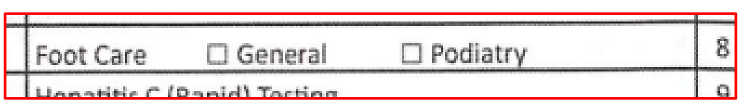
Looking at the previous example for the Consent form you can see from the "hits" (how many documents have been found with this phrase) that the phrase "event of complications" is also found on some other form. However when that score is combined with the "patient consent for care" phrase and the "code of conduct" phrase the document is considered a match.

THINGS TO CONSIDER WHEN DEFINING YOUR DOCUMENT IDENTIFICATION RULES

- Don't depend on just one phrase. It may be unique now but not in the future. Or a misread on a page may make it appear to match. Or damage to the form may make it unreadable.
- The document scanning process can usually read down to 8-point fonts. But not all fonts are created equal. It is best to test. See the section in this document on testing.
- Select multiple phrases from different parts of the page. There may be damage to forms, rips or coffee stains, or a doctor may write over part of the page, and so all the page text is not always available. Define more phrases than you need.
- Case does not matter when matching the phrases. Therefore "Medical Records" or "medical records" will get the same result.
- If your paper image scanner is setup to scan both sides of a form then phrases from both sides may be used.


PATIENT CONSENT FOR CARE & LIABILITY WAIVER

- You may include special characters in the phrases. For example a phrase may be "vitals:" or "(hearing loss)". Not all special characters are recognized and not in all fonts. But including these characters can be an effective way of identifying a unique phrase. As always with this process, test.
- The phrase searching process removes all intermediary blanks from the captured text and removes lines and boxes it does not recognize. Therefore the following fragment from a form can probably be found using the phrase "foot care general podiatry".


Foot Care ☐ General ☐ Podiatry 8

- The system only recognizes English characters. Phrases written in other languages may be used as long as they use Western Latin characters.

WHAT TYPES OF FORMS CAN BE AUTOMATICALLY IDENTIFIED?

Medical records of all kinds may be automatically identified. Dental forms, x-rays, lab work you have sent out, receipts for shipped glasses, consent forms, requests for patient information, prescriptions, etc… Any type of paper or form which has some kind of readable unique text on it may be setup in PaRIS and recognized.

One example is group that uses a dental x-ray machine with software that puts the manufacturer's website address on the bottom of each x-ray. That is a nice unique phrase that helps define a rule allowing PaRIS to recognize the page as an x-ray.

If you are generating forms that you design yourself you can put unique values in the bottom margins such as "*#DentalForm*" or "*#SparkPrescription*" or "*patient consent form 4/13/2019*".

WHAT ARE THE LIMITATIONS ON THE FORMS IDENTIFICATION PROCESS?

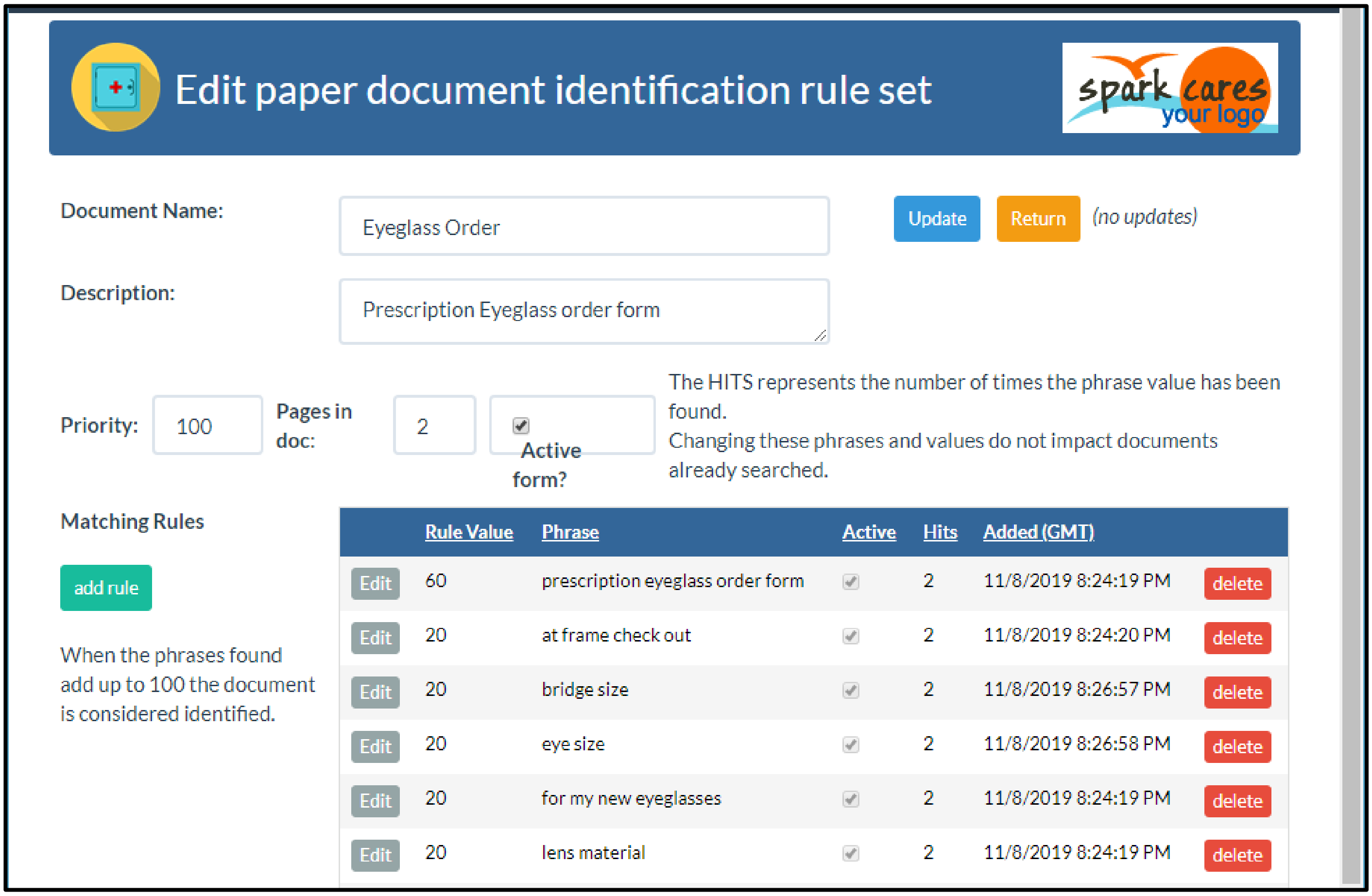
1. The PaRIS system only supports PDF, JPG, and PNG format files.
2. Any number of form identification rule sets may be defined. This means your system can be setup to automatically identify hundreds of different form types.
3. The system works best when the resolution of the printed text is at least 150 DPI and the font size is at least an 8 point font. The specific font does
4. The system can detect Latin-script characters from the standard English alphabet and ASCII symbols.
5. The maximum file size for JPG and PNG files is 5 MB. PDF files may be 500 MB and have no more than 3000 pages.
6. The rule sets defining a PaRIS form may have hundreds of phrases defined. Usually no more than 5 or 6 are needed.

TESTING YOUR FORMS IDENTIFICATION RULES

The best way to test your forms is to take examples of your forms, blank or not, and upload them to your training clinic. You may want to take a dark marker and black out any patient identifiable information if these are used forms. These will not be matched to a patient but that does not matter for the forms recognition process.

Using the paper copy of the form select a variety of unique, or nearly unique, phrases which may be used to identify the form you are working on.

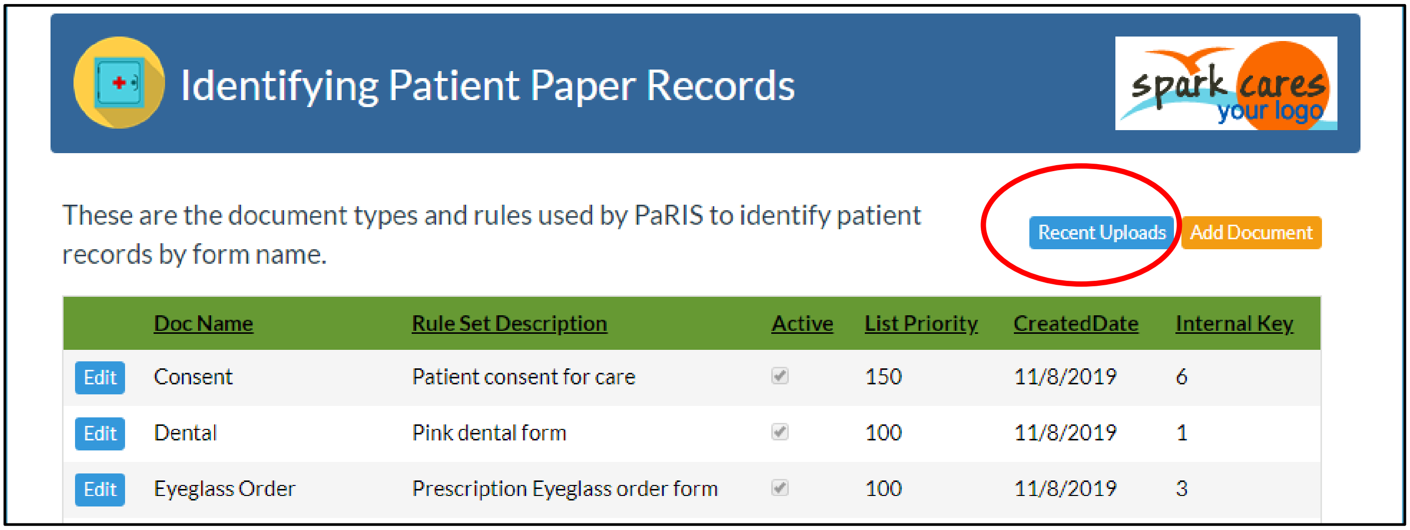
On the Admin menu select the option Doc Identification. Then click [Add Document]. Enter in the phrases and other parameters.



Once you have the initial definition of your documents open your training clinic and upload the test form as you do for all forms. The Data menu, option Paper Record Management. Then click [Choose Files], choose your new test file, and click the red [upload] button. It may take a minute or so to be uploaded, encrypted, and have the form recognition process run on the form.

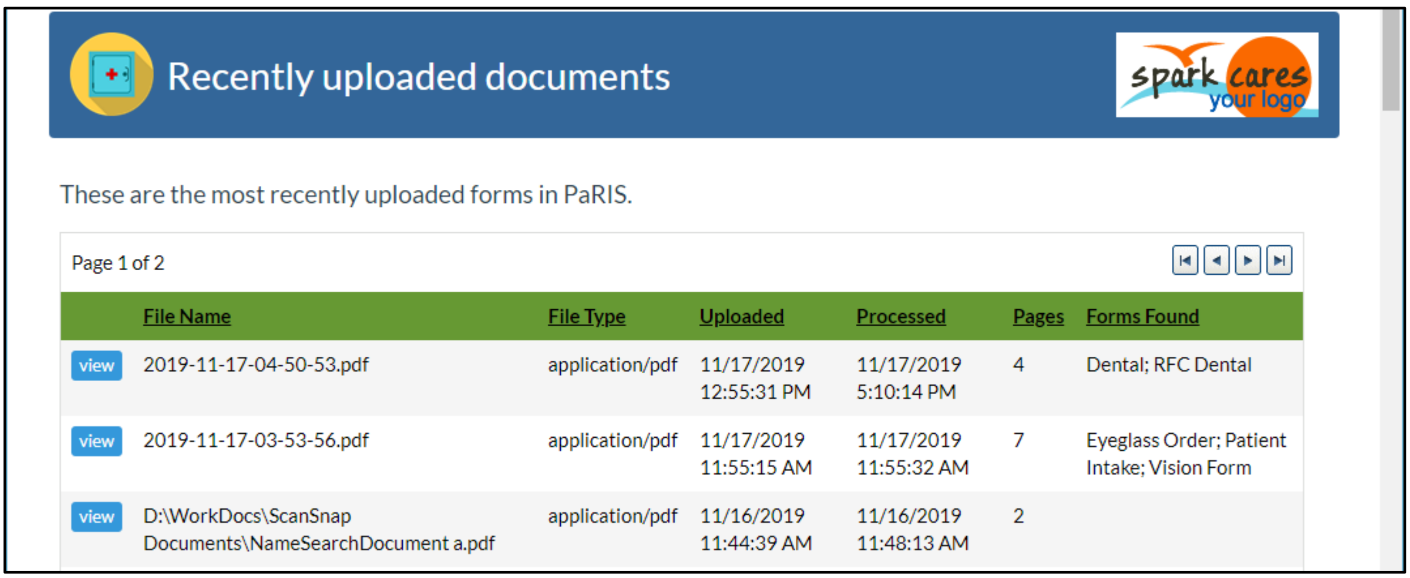
Testing continues on the next page…

Once you have uploaded a sample form go back to the document identification page. Admin menu, Doc Identification option. See the image of this page below. It will show all your defined rules.



	Doc Name	Rule Set Description	Active	List Priority	CreatedDate	Internal Key
Edit	Consent	Patient consent for care	✓	150	11/8/2019	6
Edit	Dental	Pink dental form	✓	100	11/8/2019	1
Edit	Eyeglass Order	Prescription Eyeglass order form	✓	100	11/8/2019	3

Click on the blue [Recent Uploads] button. This will show you a list of the last 200 documents uploaded into your system. The test file you just uploaded should be at the top. The FORMS FOUND column will show you if the PaRIS identified any of the documents you have defined.

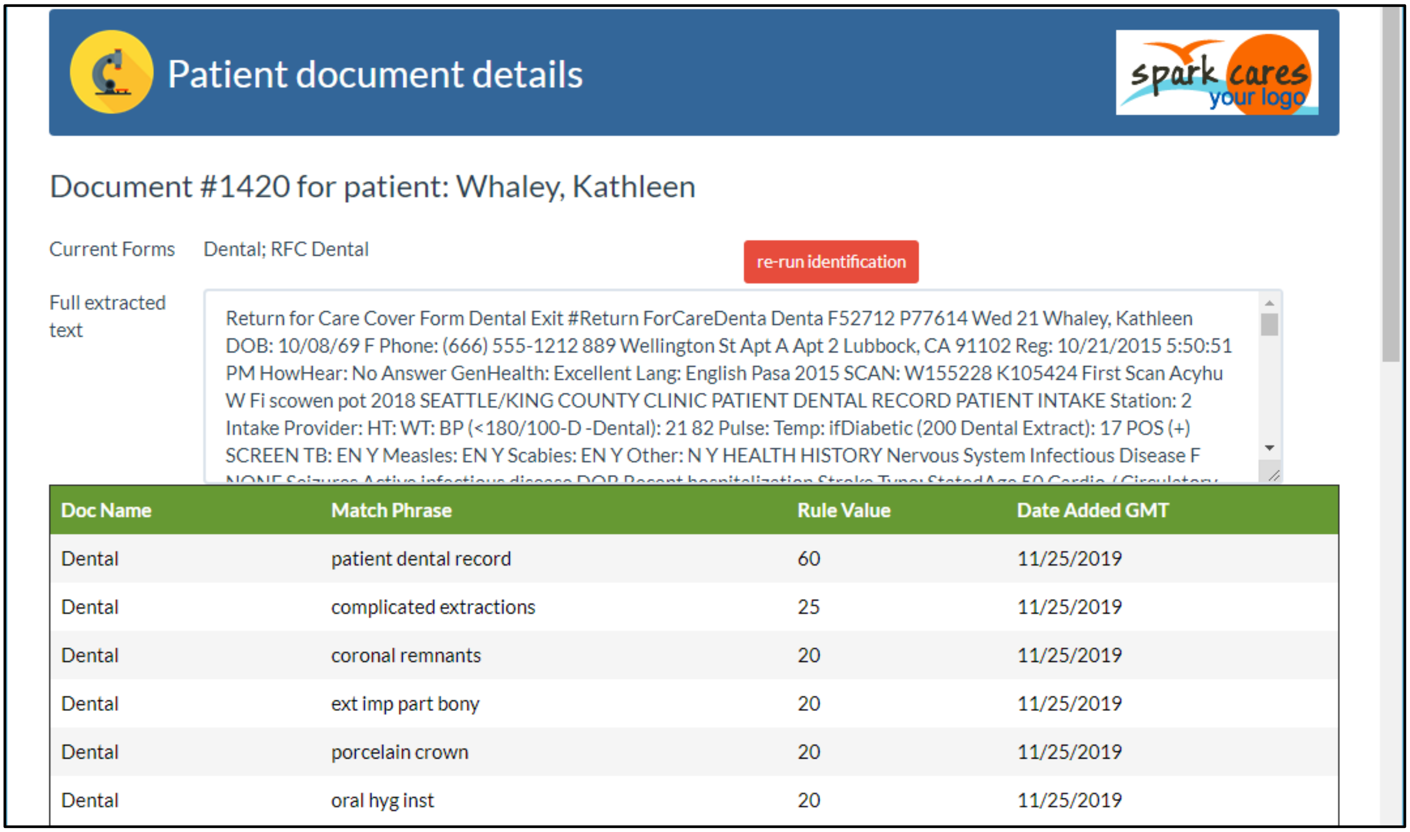


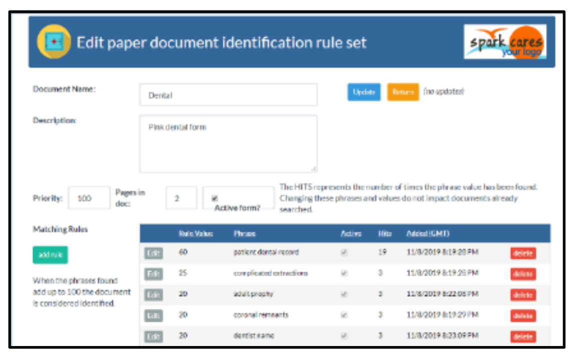
	File Name	File Type	Uploaded	Processed	Pages	Forms Found
view	2019-11-17-04-50-53.pdf	application/pdf	11/17/2019 12:55:31 PM	11/17/2019 5:10:14 PM	4	Dental; RFC Dental
view	2019-11-17-03-53-56.pdf	application/pdf	11/17/2019 11:55:15 AM	11/17/2019 11:55:32 AM	7	Eyeglass Order; Patient Intake; Vision Form
view	D:\WorkDocs\ScanSnap Documents\NameSearchDocument a.pdf	application/pdf	11/16/2019 11:44:39 AM	11/16/2019 11:48:13 AM	2	

Click the [view] button next to your test document.

Testing continues on the next page…

The image below shows the details for the selected file (your test document). It shows the Current Forms which have been identified, displays all the recognized text and special characters in the file, shows you the rules that were matched, and at the bottom of the page it shows the document (not shown in the image below).



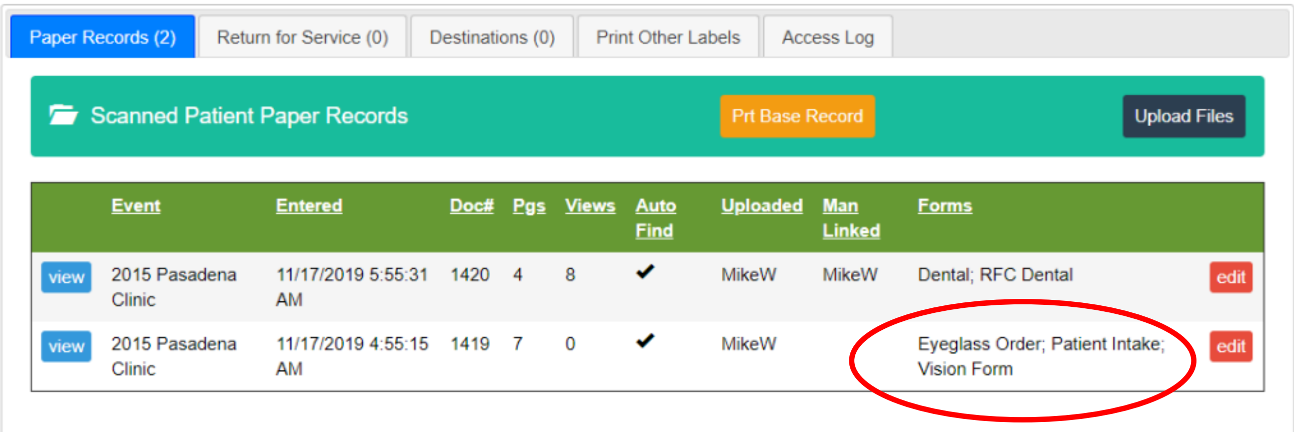


A nice method is to open a second browser window to the documentation identification rule page and use the two pages together. Change the document identification rules on the rule definition page and then press the red [re-run identification] button on the page showing the details for your test file.

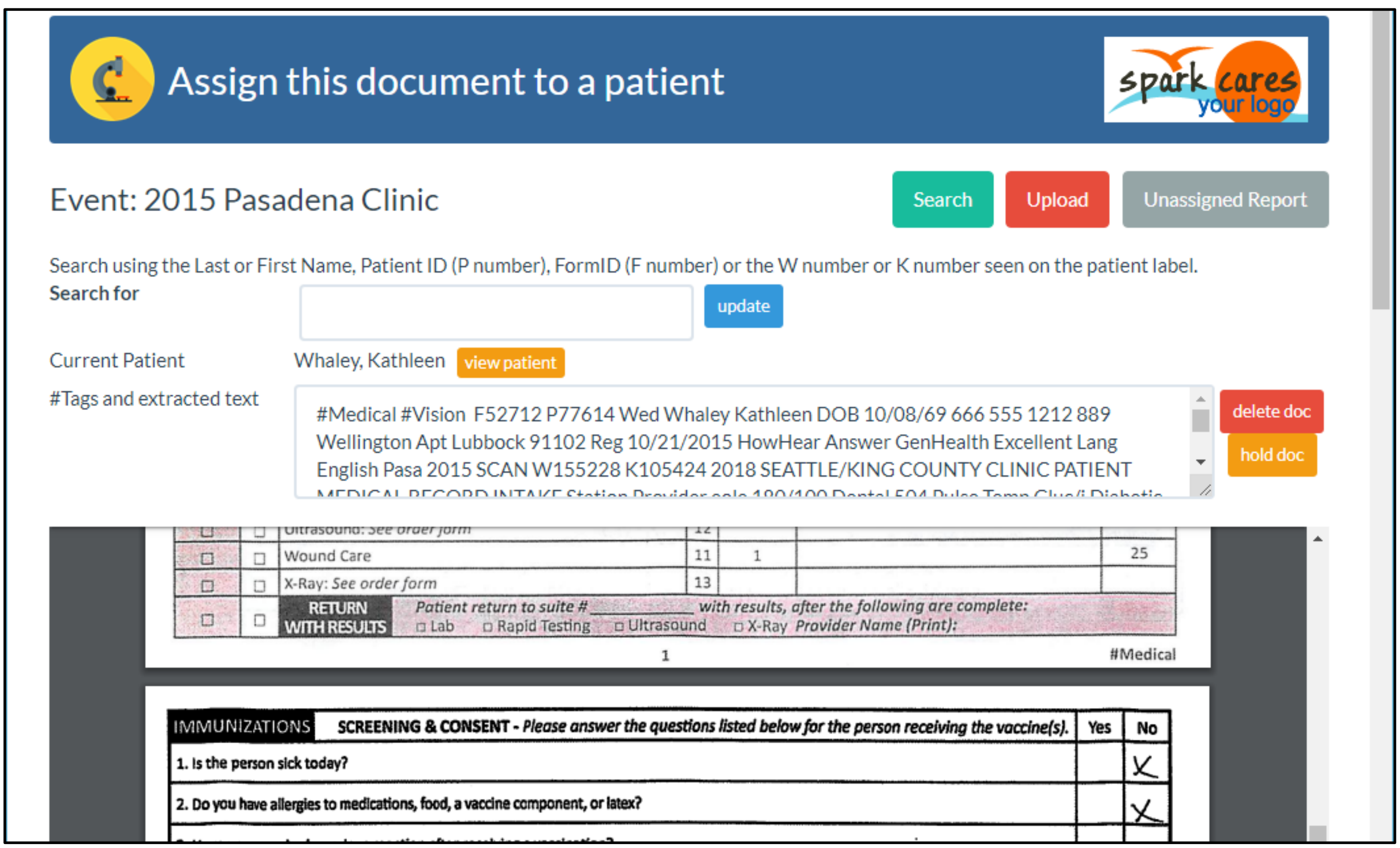
Remember that for the document to be matched the rules must add up to 100. Most phrases you use in rules will not be guaranteed to be unique to the one patient form, so depending on a single phrase is not the best strategy. And that one phrase may not be useable on your forms due to coffee stains, handwriting on the page, or paper damage. The best strategy is to select a variety of phrases from around the page so that even in the event of damage or unreadable areas of the page there will still be a good chance to recognize enough of the phrases to identify the document.

FINDING AND FIXING DOCUMENT IDENTIFICATION ERRORS

While using PaRIS you may find a file in a patient's medical record that does not seem to have all the forms in a file identified. For example, in the image below of a patient's medical record, the system found 7 pages in the file but you know the forms shown (Eyeglass Order; Patient Intake; Vision Form) and they represent 6 pages. So what is the 7th page?

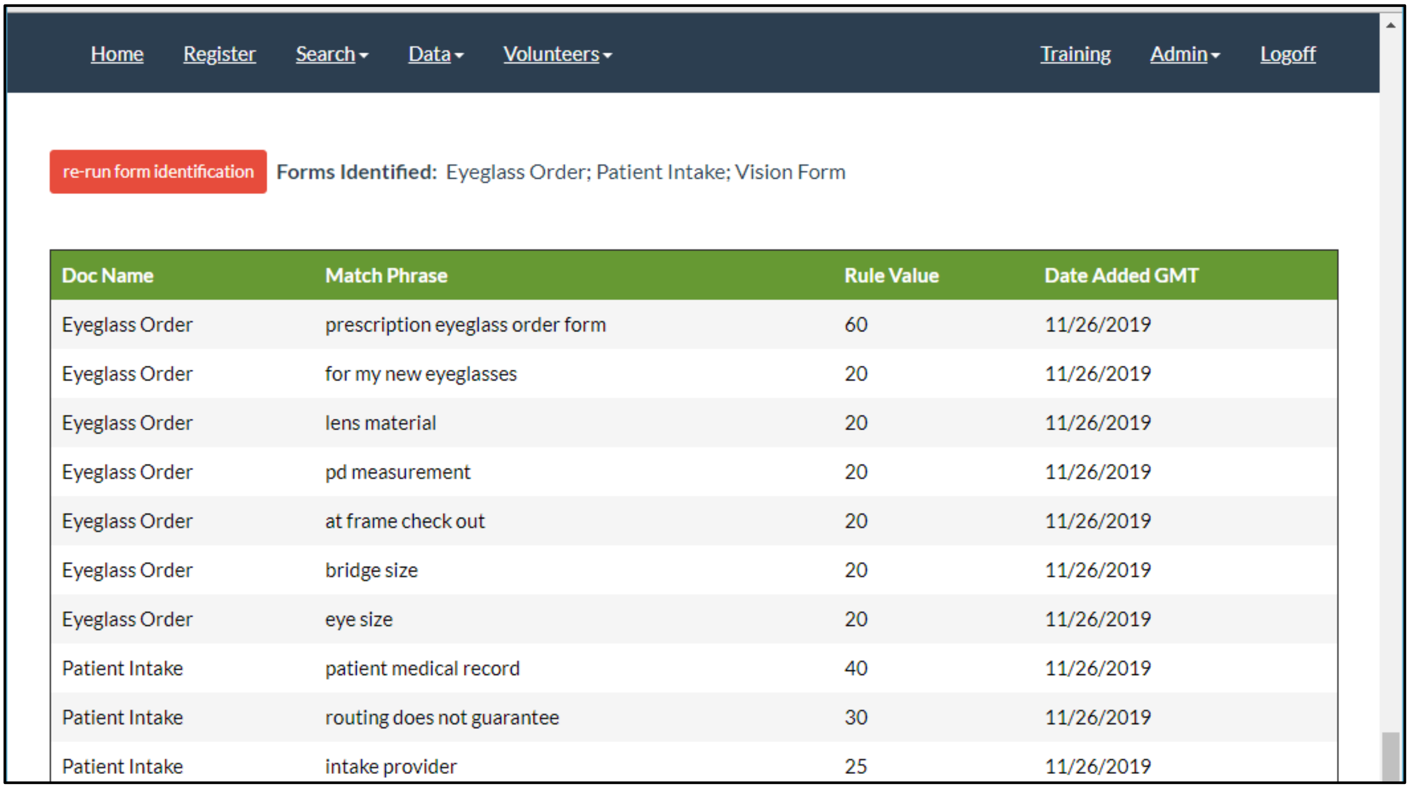


Click the red [edit] button next to the file. This will open up the page shown below. This is normally used to assign the file to a patient but can also be used to re-run the document identification process.



The first step will be to look through the file and determine if there was a document identification error. The desktop scanners will usually ignore the backs of documents if they are blank but a coffee stain, or if someone wrote on the back, these blank pages may be scanned and change the page count.

If you do find an error in the document identification process then scroll to the bottom of this page. This will show the full list of identified phrases and which tells you why each form was identified.



Doc Name	Match Phrase	Rule Value	Date Added GMT
Eyeglass Order	prescription eyeglass order form	60	11/26/2019
Eyeglass Order	for my new eyeglasses	20	11/26/2019
Eyeglass Order	lens material	20	11/26/2019
Eyeglass Order	pd measurement	20	11/26/2019
Eyeglass Order	at frame check out	20	11/26/2019
Eyeglass Order	bridge size	20	11/26/2019
Eyeglass Order	eye size	20	11/26/2019
Patient Intake	patient medical record	40	11/26/2019
Patient Intake	routing does not guarantee	30	11/26/2019
Patient Intake	intake provider	25	11/26/2019

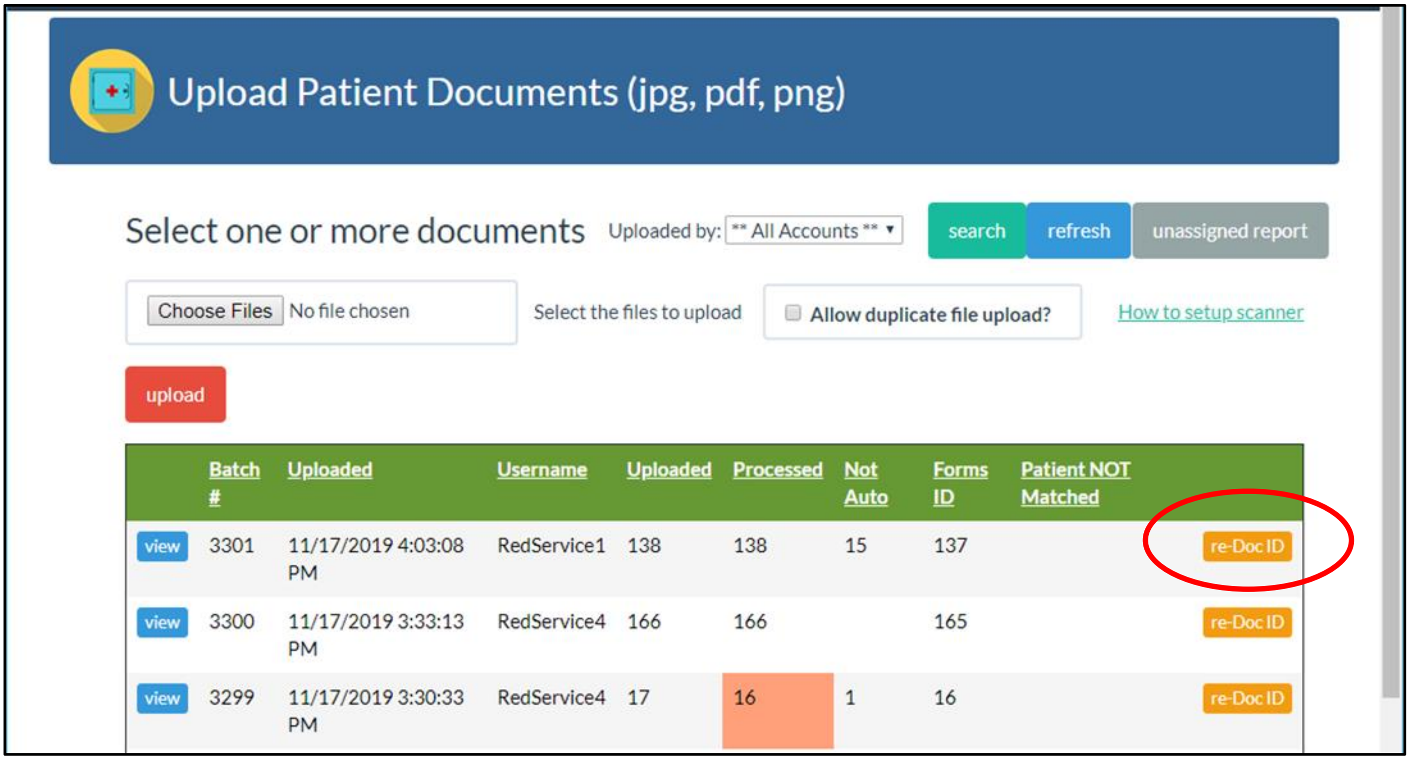
Remember that the rule values must add up to at least 100 for the form to be considered a match. Reviewing this list will help you find out which phrase matches are working in this document and which are not. Note that there might be document damage, or handwriting on some of the phrases, which might explain missing phrases. You also might see a phrase match from a document not in the file. If that does not add up to a rule value of 100 then it is not a problem.

If you do find issues with the document phrase rules you will then need to open a second browser window and edit the document rules. Then press the red [re-run form identification] shown in the image above to find the proper forms in the document.

If you need to then rerun the document identification process on more forms see the next section on re-running document identification on uploaded document batches.

RE-RUNNING DOCUMENT IDENTIFICATION ON UPLOADED BATCHES.

You may find that after uploading several batches of documents into PaRIS one of your form rules is not working well. Use the techniques documented previously to fix the errors. Then you may update each of the impacted batches by pressing the [re-Doc ID] next to the batch. This will go through each of the files in the batch, look through all the text found and using your phrase rules determine the forms in each file.



Only Administrators and users with the “Doc ID” privilege set can see and use this button.

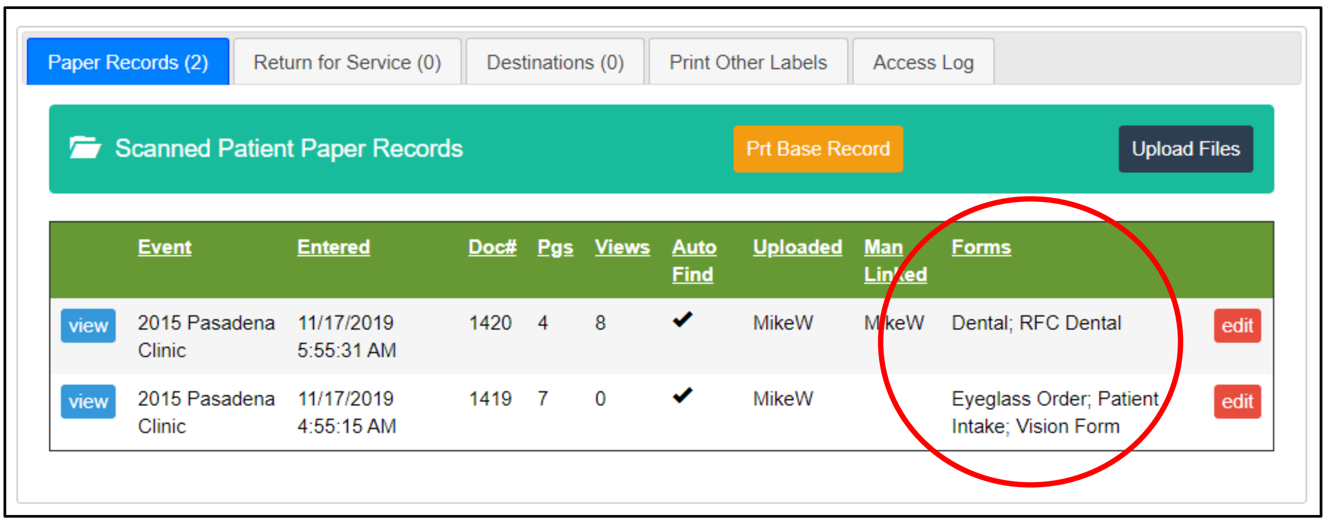
HOW MANY DOCUMENTS MAY I SUBMIT AT MY CLINICS?

You may need to use your forms almost as soon as they are uploaded. Your clinic may be spread over a high school or community center and a dentist in one part of the campus may like to see the medical triage information gathered in another part of the campus.

The document upload, encryption, patient matching, and form identification process can handle 20 to 30 files a minute. Your system operators (volunteers usually) may upload the forms as fast as the forms become available. PaRIS queues the files to be processed separately. At the 20 to 30 per minute rate PaRIS can process about 1500 files an hour. For most moderately sized clinics if you are uploading your documents as they become available, in small batches rather than all at once at the end of the day, they should be processed and available in minutes.

HOW ARE THE IDENTIFIED FORMS SHOWN ON THE PATIENT'S MEDICAL RECORD?

In the detailed patient medical record is the tabbed area toward the bottom of the page. The **Paper Records** tab shows all the uploaded forms for each patient. There is now a FORMS column which shows the identified forms in the file.



WHO MAY SEE AND UPDATE MY DOCUMENT IDENTIFICATION RULES?

All administrators on your system may update the document identification rules. In addition any defined user with the "DOC ID" privilege may see and update these rules.

DESTINATION PROCESSING – SENDING PATIENT MATERIALS OFFSITE

PaRIS can help facilitate and track materials set offsite for your patients. Examples might be:

1. Sending an eyeglass prescription and a frame to an outside company to get glasses made.
2. Sending a blood sample offsite for testing.
3. Sending information, possibly x-rays and things, offsite to get dentures made or repaired.

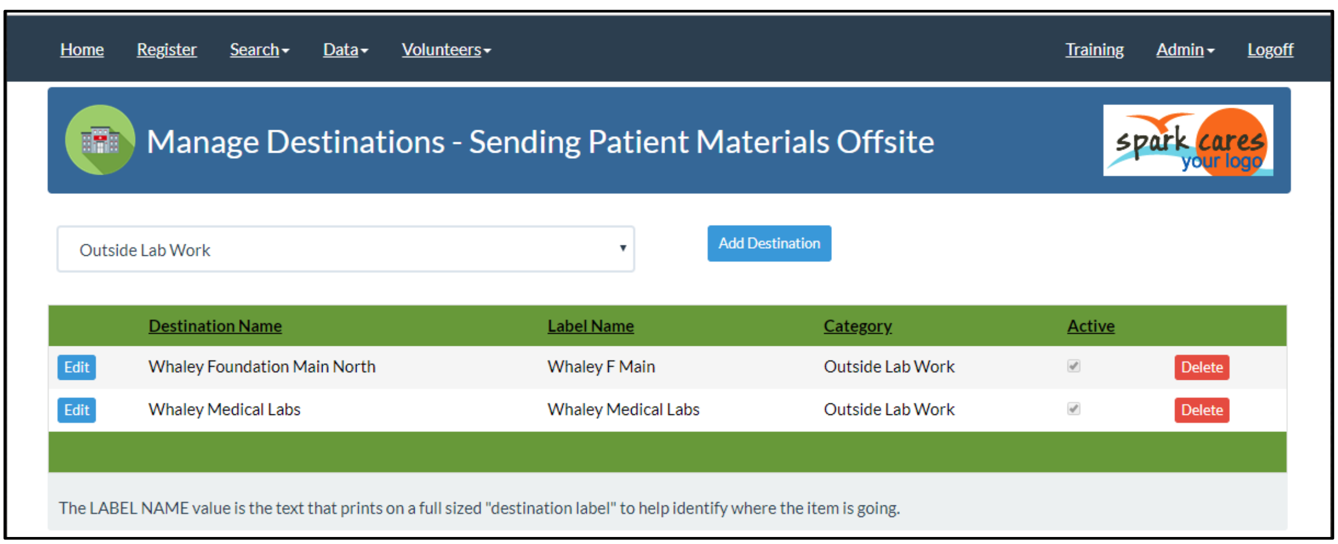
At large clinics you may be sending hundreds of items offsite and PaRIS can help keep track of what items are sent to what locations. And then track other workflow on these items such as their being returned, patients contacted, and the final distribution of the items.

CREATING YOUR DESTINATIONS

Destination AREAS (dental, eye glasses, bloodwork labs) are created by Spark. Just send a quick email to us and we will create them.

To create your specific destinations (the bloodwork labs, hospitals, companies making your glasses) can be created, or inactivated, by you at anytime.

Menu: **Data → View / Edit Destinations**



Once created these may be used by any of the clinics defined in your system.

The “Label Name” is the name printed on destination labels, if used, to help you identify where the item is going.

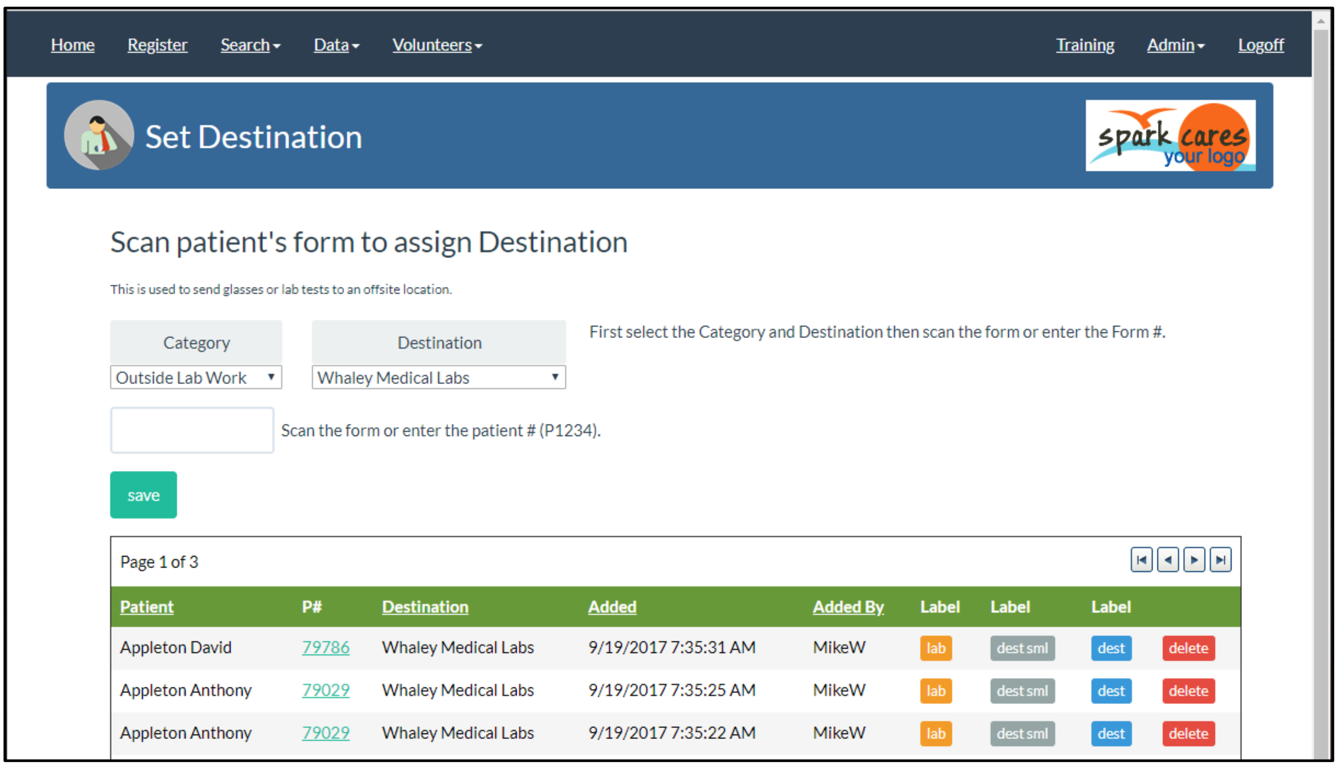
SENDING A PATIENT ITEM TO A DESTINATION

You “send an item to a destination” when you are sending out eyeglass frames and a prescription to an outside company to be made. Or sending out blood samples for testing. Or sending out dentures to be repaired.

When you are ready to send an item to a Destination use menu: **Data → Destination Set**

The item may come with the patient’s medical form. If so, select the Category of this item and the DESTINATION for the item. Then just scan the standard patient label’s barcode and the item is checked out to that location. The destination is recorded in that patient’s medical record.

There are also reports showing items which have been checked out and those which have not yet been checked back in.



Note that you are not specifying WHAT is being checked out. That should be implied with where you are sending the item. If that does not work you may need to define more specific destinations to match the type of item sent.

Typical use

A typical use of this feature is to check out eyeglass prescriptions and frames being sent to outside companies who have agreed to make them for you. There may be several of these companies. Keeping track of which has been sent to which company is helped by this destination process. Several times a day you might take the box of frames being sent out and open this destination page and just scan all the bar codes, one after the other. Very quick.

PRINTING DESTINATION LABELS

One option with destinations is to print a little PaRIS patient "lab label" and stick it on the box or bag or test tube being sent out. This way upon return this little barcode can be quickly scanned to check in the item. This makes the return process quick and accurate. You also know when it was returned and who marked it returned.

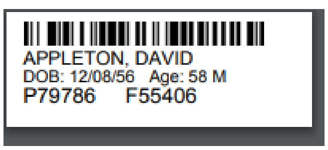
When you scan an item out to a destination it appears on the screen as shown below.

Page 1 of 3

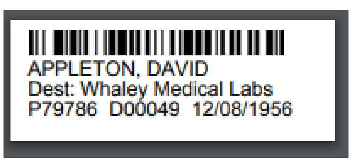
Patient	P#	Destination	Added	Added By	Label	Label	Label	
Appleton David	79786	Whaley Medical Labs	9/19/2017 7:35:31 AM	MikeW	lab	dest sml	dest	delete
Appleton Anthony	79029	Whaley Medical Labs	9/19/2017 7:35:25 AM	MikeW	lab	dest sml	dest	delete
Appleton Anthony	79029	Whaley Medical Labs	9/19/2017 7:35:22 AM	MikeW	lab	dest sml	dest	delete

From this page you can print three different labels depending on what you need. The size of the labels varies to allow you to use them on different sized containers.

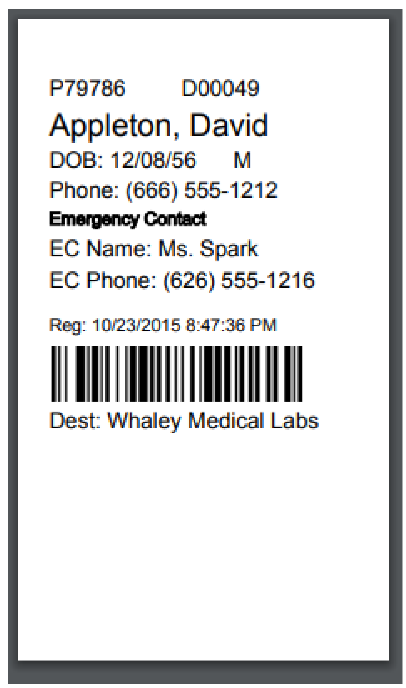
[LAB]



[DEST SML]



[DEST] --→

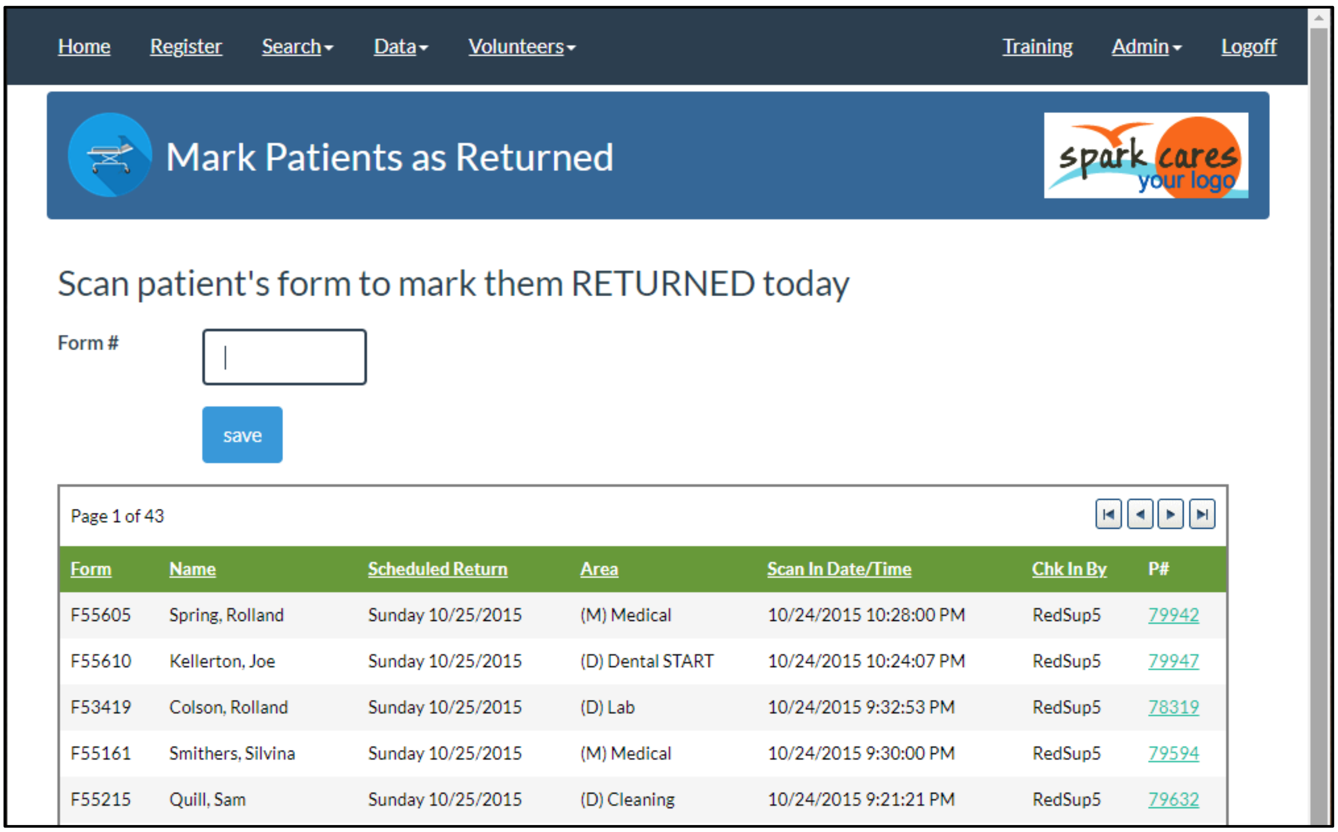


CHECKING BACK IN PATIENT ITEMS SENT TO A DESTINATION

It is helpful to know when and where patients' items have been sent out. But it is also helpful to get a report of those items which have not yet been returned. So, the PaRIS destination process also helps you track the returned items.

When an item is returned open menu: **Data → Destination Return**

You will see the page below. The only input field is asking for the form #. This means you open this page and then just use the hand-held barcode scanner to scan returned items. If you receive 15 to 20 back it is very quick to scan them all back in. Using the barcode and scanner, rather than typing in the form #, makes sure there are no mistakes.



Once scanned the patient's name appears on the list to help you keep track of the items you have already scanned as returned.

ERRORS: If you scan an item returned twice it doesn't hurt anything.

USING ADDITIONAL WORKFLOW STEPS FOR DESTINATION PROCESSING

If you have more steps in your destination process PaRIS allows these additional steps to be defined. For example:

1. Eyeglasses and frames sent offsite to XYZ company to make the patient's glasses.
2. Glasses and forms returned.
3. Patient contacted.
4. Patient picked up their glasses.

When you define all of these as STEPS in PaRIS you may then scan them in after each step is complete to help keep track of the destination processing.

FIXING DATA ENTRY ERRORS

ENTERING A PATIENT INTO THE WRONG CLINIC

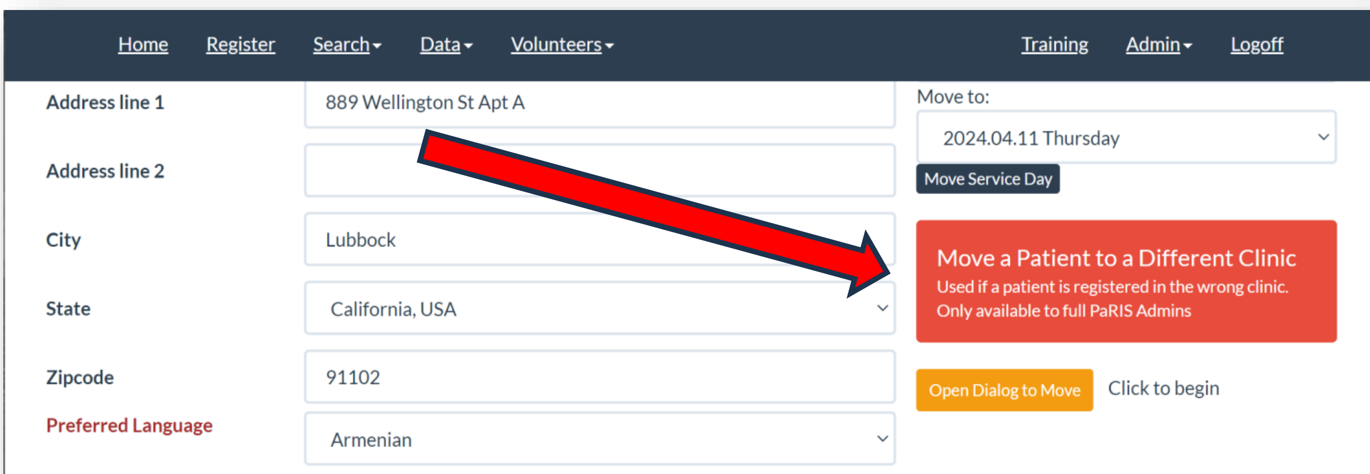
You may find out that some of your patient registration volunteers have entered a patient into the wrong clinic. Registered in the TRAINING clinic for example. Even entered services and uploaded paper forms for them. To resolve this error and move them to the correct clinic. This move function will move:

1. All the patient's registration information from one clinic to another. The patient may be registered in any number of other clinics and that information will not be touched.
2. The answers the patient gave when registered will be moved to the new clinic as long as the same questions are asked for the new clinic. Only the matching questions will be moved.
3. All the services entered will be moved.
4. All the paper documents scanned will be moved.

To begin find the patient. Usually with the patient search function. Open the patient's record and scroll down. On the left you will find the following information:

This is ONLY available for full PaRIS administrators. Your usual volunteers will not have access to this functionality.

Click the orange button to open the move dialog box and fill out the parameters.



Continue on the next page…………………

Select the MOVE FROM clinic and the MOVE TO clinic in the drop down lists.

Then click the red Execute Move button.

PATIENT'S REGISTERING THEMSELVES WITH MOBILE DEVICES

This is a new feature (July 2020) designed to help with the social distancing requirements due to COVID-19. This system will allow your patients to create "profiles" days or minutes before entering a clinic. With a patient profile the patient can walk into one of your clinics to register with all their questions pre-answered. This makes registration faster with less volunteer interaction. If you use this profile option the registration and form setup is so quick the patient may not even need to sit down. Patient may create their profiles or months before they attend a clinic. This does not register them for the clinic, they still need to get a number (or ticket or armband) and sign up for dental or vision (the same routine most of you use now).

PATIENT PROFILE SYSTEM OVERVIEW

1. You will get a new website for this purpose which will be separate from your PaRIS system.
    a. Something like https://patients.YourDomain.org
    b. There is no additional cost for this.
2. Spark will define a new "clinic" in your system to contain these profiles. You will configure that profile clinic to contain the patient questions you need answered.
3. You will configure the system so that the introduction text explains how to use the system with your processes.
4. You will configure the system so that the explanation for "next steps" contains your wording for what to do with their profile in your clinic process.
5. The profile process generates a barcode (1D or QR code) on the patient's smartphone which may be used for quick registration at your clinics.
    a. Volunteers will need training for how to use the barcode.
    b. A whole family may generate profiles on a single smartphone and all their barcodes will display.
6. You will configure the wording for the patient waiver if you choose to use this feature. With this feature your waiver is displayed on their phone and they sign the document with their touch screen. A PDF is then generated of their signed waiver and stored with their patient record. This should eliminate the need to sign the waiver in person.

SETTING UP YOUR SYSTEM FOR PATIENT PROFILES

NEW WEBSITE FOR THE PATIENTS

A new website will be setup for the patient mobile profile software for your system. This may be a completely new URL or a sub-domain of your current patient website. In either case, the software is completely separated from your PaRIS patient system website.

Examples (yours will have your domain name):

https://patients.*OlympiaFreeClinic*.org

-- or –

https://paris.*OlympiaFreeClinic*.org/patients

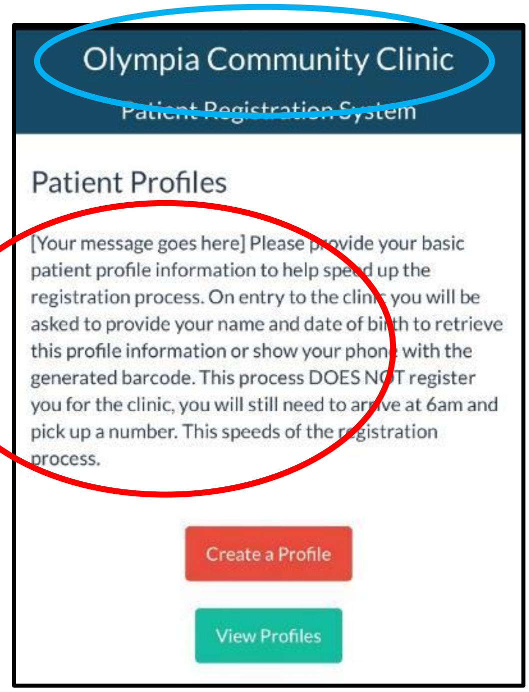
Let us know the domain name you will want to use. If you don't have a domain we can set up a name for you.

NEW CLINIC DEFINED FOR PROFILES

You will be defining a new clinic in your PaRIS system as a "profile" clinic. This will be a clinic which has all the default questions defined you want in your patient profile. The patient profile information will be stored in this clinic and copied to the real clinics once the patient register on-site for the real clinic.

WHAT WILL PATIENTS SEE?

The patients will be encouraged to create their own profiles before the clinic, even the morning of the clinic. They will open your patient profile website on their mobile device or home PC and will see the following:



In the title bar is the identifier for your system. Shown with the blue circle to the right. This will usually be the name of your organization. This is set in your customer settings.

Menu: Admin → Customer Edit

At the top of the first page, in the red circle in the example, will be an explanation of the process. You will have control over the wording of this explanation. Note that if the patient has some language translation functions turned on they may be able to see this section in their language.

The patient fills out their name and date of birth.

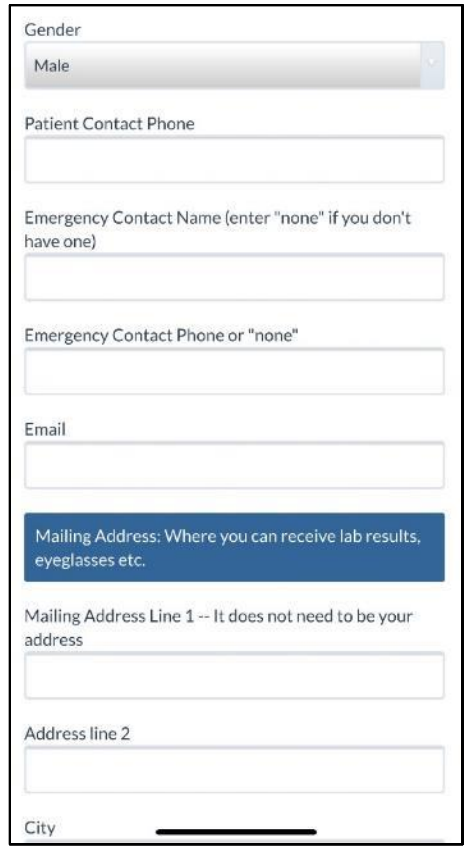
If the system finds a match, meaning that patient has already been to one of your clinics or has already created a profile, then the system will prompt them with the clinic name and date to verify it is the same person. More on this later.

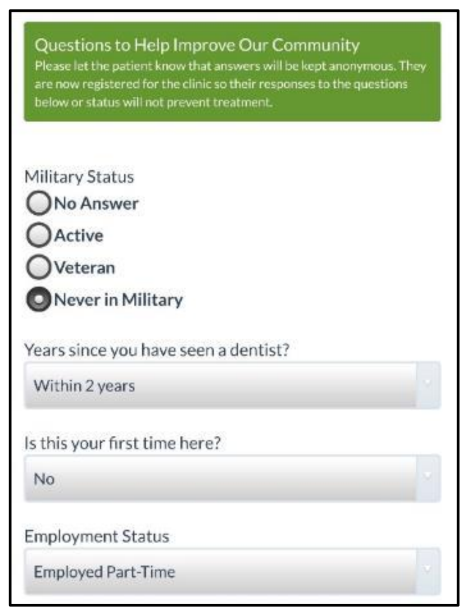
The next screen presents all the questions you have setup. You control which questions are required and the wording for each question.

The patient profile may contain more questions than you use at a specific clinic.

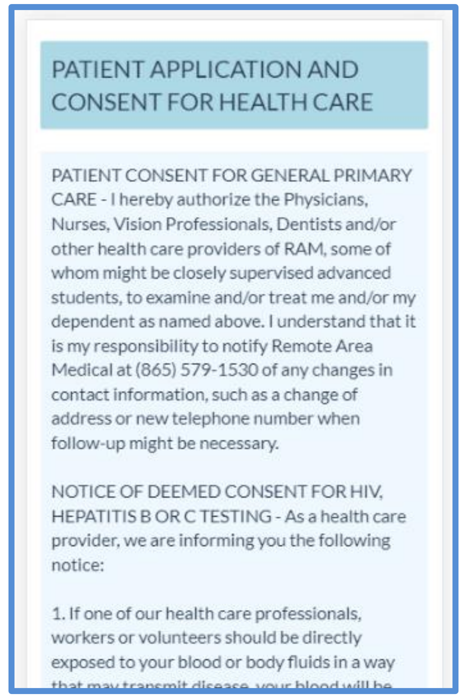
Once all of the questions are filled out they press the blue [create profile] button to generate their profile.

Note: At no time does the system allow the patient to enter a name and DOB and display a patient's personal information. The system cannot be used as a "patient lookup". Therefore a patient cannot edit their profile. If they do change their address, or make a mistake, they will need to create a new profile.





SIGNING THEIR WAIVER / CONSENT FOR CARE

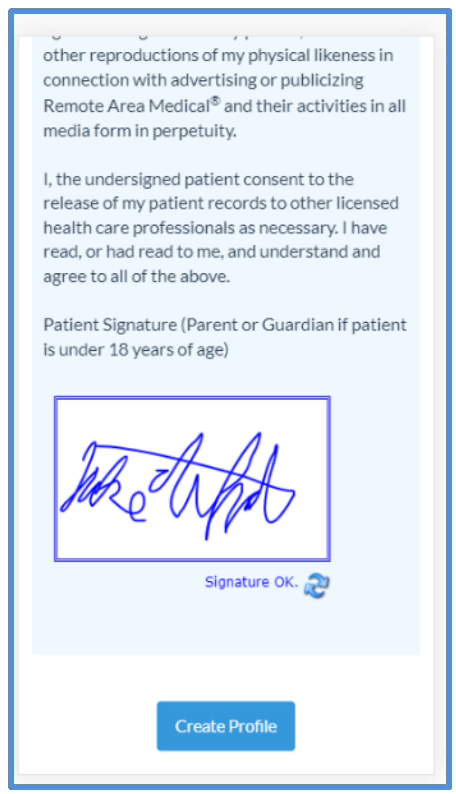


After answering the registration/profile questions they will optionally see the patient waiver and then sign it using their touch screen device.

Your group controls the title of the waiver and the text.

If you decide to use the patient waiver then the signature is required.

Once they sign and click [Create Profile] a PDF of the waiver document is generated and stored with their patient medical record.

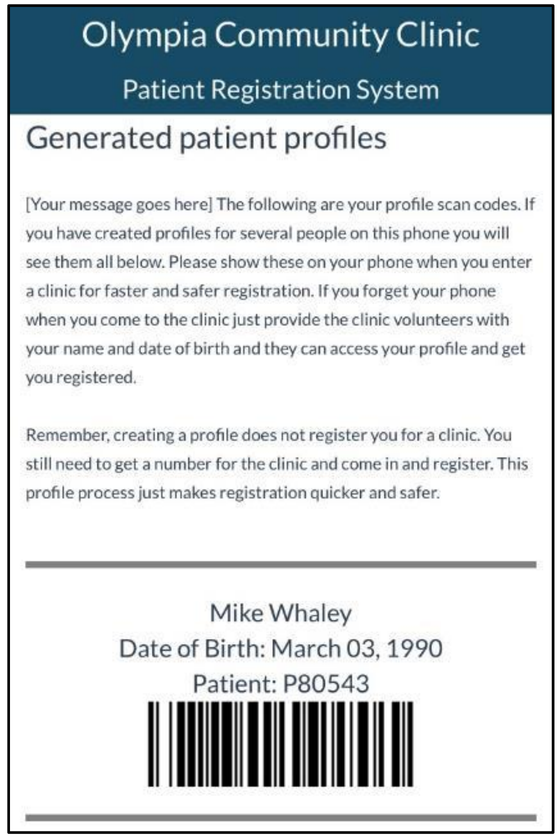


For more information on the patient waiver process see the section

Patient Profile Waivers on page 95.

Once the patient has saved their profile, the page to the right will be displayed. You have control over the wording on this page to give the patient instructions on what to do next.

The system will optionally display a barcode or QR Code for the patient. This image can be used to bring up the patient's record in the PaRIS system at any point during the clinic.



IN THE BEST CASE SCENARIO THE PATIENT PROFILE PROCESS WILL BE:

1. The patient signed their waiver online when they created their profile.
2. They walk in to the clinic with their pink (dental) number.
3. They are given the dental, medical, etc… forms.
4. They walk up to patient registration desk and have their barcode scanned on their mobile device. This opens their patient record and fills it in from their profile information.
5. The volunteers adds them to the current clinic selecting the service areas based on the paper forms they have (just like today).
6. Labels are printed and attached to the forms.
7. The registration process is complete.

Note that in this best case scenario no words even need to be exchanged and the process is very quick. Therefore the need for translators is reduced at this stage.

REGISTERING FAMILIES ON A SINGLE PHONE

Once a single profile is created the patient may click [continue] and create profiles for all the patients in their family. Since this does not generate a ticket, or number, to allow the patient entry, there is no exposure to problems with patients registering people who are not in line at your clinic.

The system will store all the profile identifiers generated on that mobile device on that mobile device. This is not any personal information, just the unique profile identifier. This will allow the system to display all the barcodes (or QR Codes) for all the patients registered on that device. Therefore that device will be able to display these barcodes to speed up registration for everyone in the family.

PROBLEMS CREATING THE PROFILE

Patients may have problems creating their profile. They may have a language barrier, they may not own a smartphone, may not know they need to create a profile, or just may have problems using their phone. For any number of reasons some patients will still need to be registered with the old method -- a volunteer asking them the questions in person.

The patient profile software is being design so that it should work on any mobile device and even work with a very minimal cell phone connection.

PATIENT PROBLEMS DISPLAYING THE BARCODE ON THEIR MOBILE DEVICE

They may have created a profile on a mobile device months ago and no longer own that phone. Or they may have cleared the *cookies* their phone, or the phone's display is so cracked the barcode can't be scanned. If for any reason the barcode can't be used for a patient with a profile then volunteer will simply do a name search. This will also be quick but it will require more volunteer – patient interaction.

PATIENT PROFILES FROM PREVIOUS CLINICS

When registering a patient their most up to date information is always used. If they created a profile in January of 2021, then registered for clinic in March 2021, then came into another clinic in July 2021, the patient information from the July 2021 clinic will be used. This should include the latest answers to all the questions.

Therefore, if a patient has attended a clinic of yours in the past they effectively already have a profile. The difference is that the questions may not exactly line up, but the registration process should still be faster.

A PATIENT CHANGES ADDRESS OR CONTACT INFORMATION AFTER CREATING THEIR PROFILE

If a patient changes their contact information after they create their profile they may:

1. Do nothing. The next time they register just tell the volunteer at the time of their registration they have a few changes.
2. Fill out a new patient profile.

Note: They cannot edit their profile themselves. There is no patient lookup built into the patient profile system. They can enter their name and data of birth and determine they have a profile, but they can't see any of the personal or contact information.

PATIENT USER SUPPORT

Patients will have questions. They can't find the website or don't understand a question or have some other error. Spark will not be providing patient user support. You will need to answer patient questions yourself. This may mean a phone number or email address they can contact to get help.

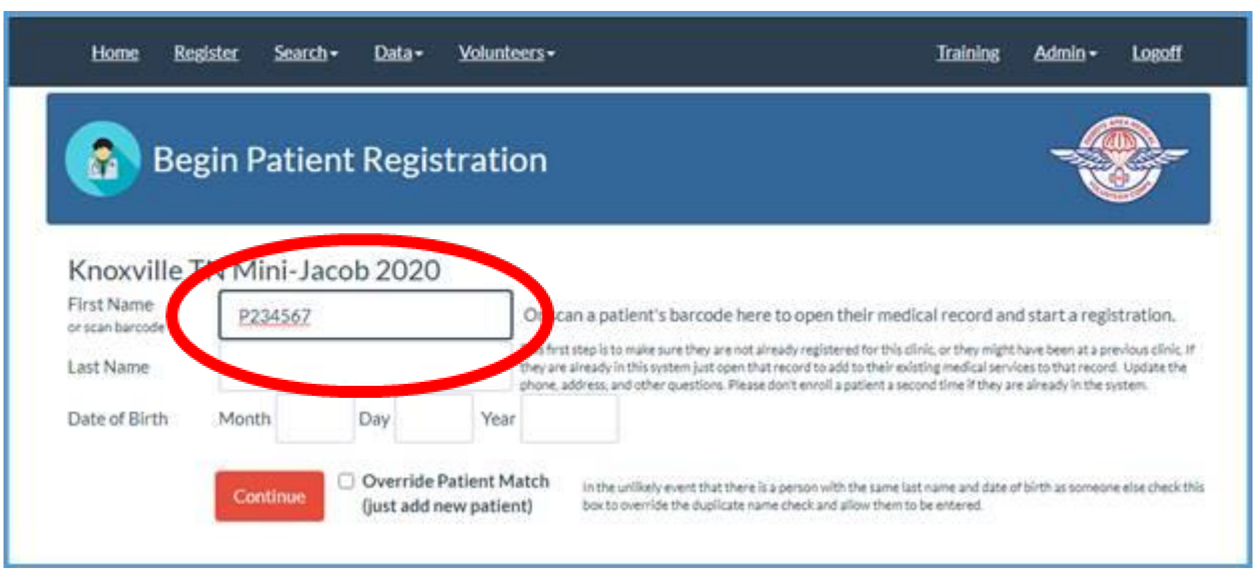
PROBLEMS SCANNING THE PATIENT’S BARCODE ON THEIR PHONE

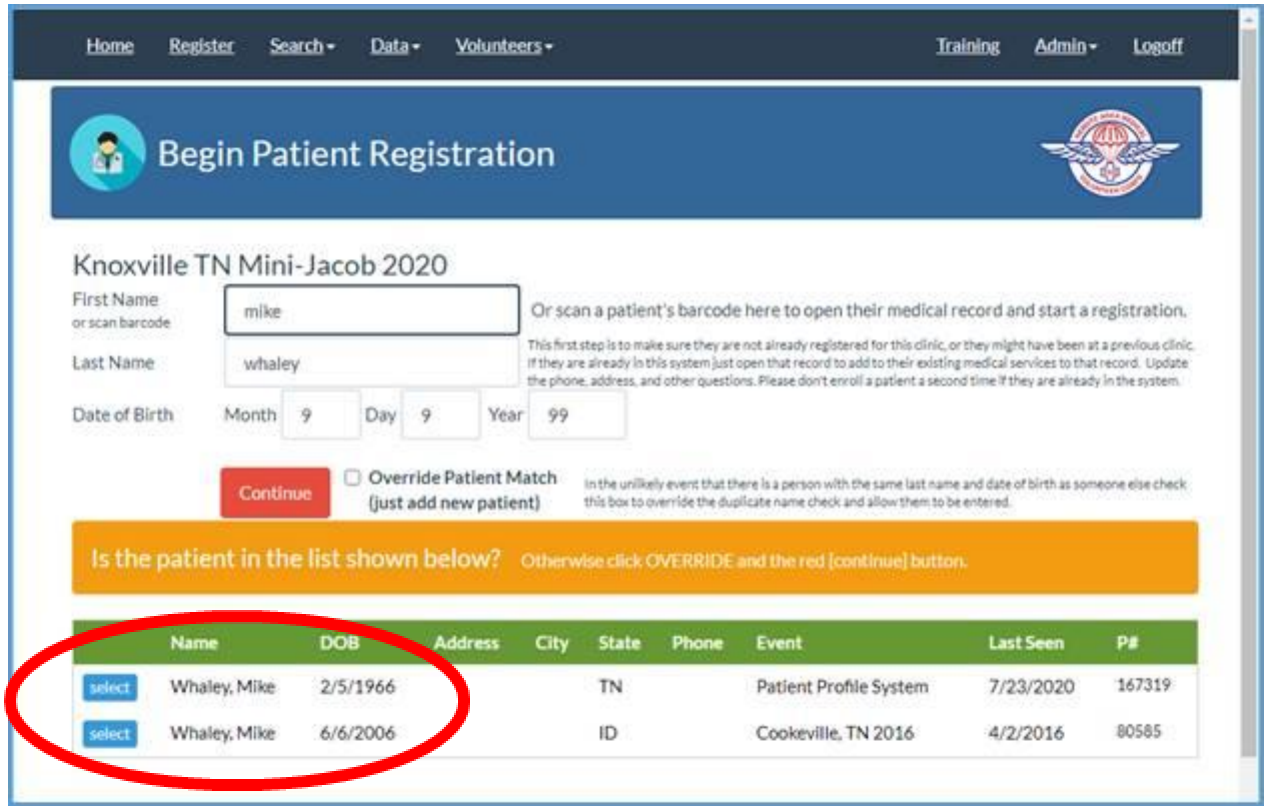
Not all hand held barcode scanners can read barcodes on a smartphone. Therefore if you plan to use the barcodes generated by the patient profile process please review the section titled Problems reading barcodes on smartphones starting on page 116.

REGISTERING A PATIENT WITH A PROFILE

If a patient has generated a profile, or has been at one of your clinics in the past, they may register and have their patient questions carried forward to the current clinic. This speeds up registration.

1. Scan the barcode on their phone into the First Name field on the registration page. This opens the registration page and fills in the data with the profile information.
2. Manually type the P# (patient number) from their profile if the scanner doesn’t work. This P# is displayed with their profile. This opens the registration page and fills in the data with the profile information.
3. If they forgot their phone, or the battery is dead, just type in their name and DOB (see the second image below). The system attempts to find similar names in profiles or past clinic attendance and shows the patients in a list. Select the correct patient. This opens the registration page and fills in the data with the profile or past attendance information.
4. If none of these work or the patient didn’t create a profile. In that case just register them normally.





Note that when using the profile registration process you are not first searching for the patient in the patient search screen. Patient registration should start from the above registration page.

PATIENT PROFILE WAIVERS –SETUP DETAILS

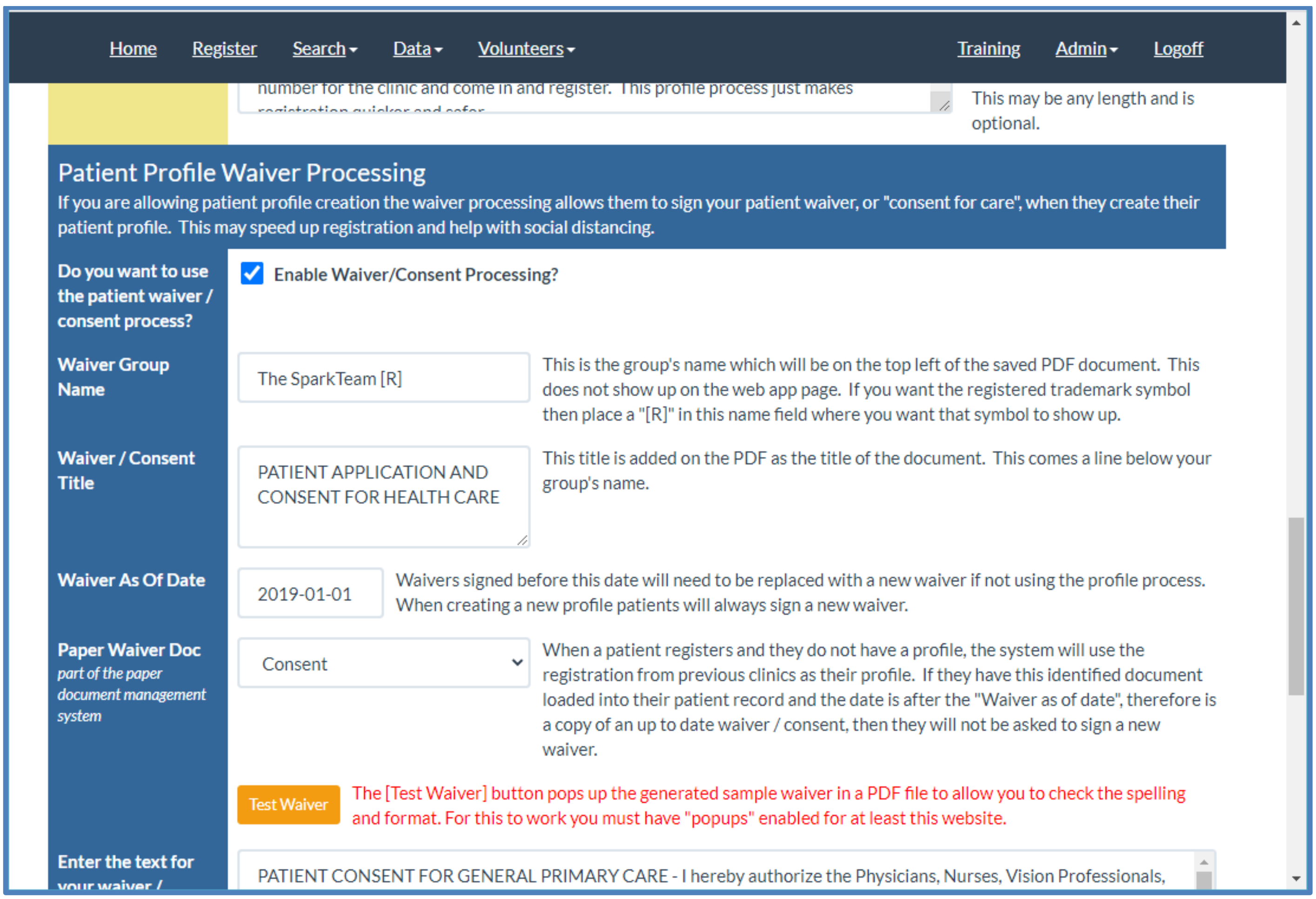
To setup your patient profile waiver open your customer edit page.

Menu: Admin → Customer Edit

Down into the page you will see the section for the patient waiver setup. The first checkbox determines if this waiver process should be active on your system.

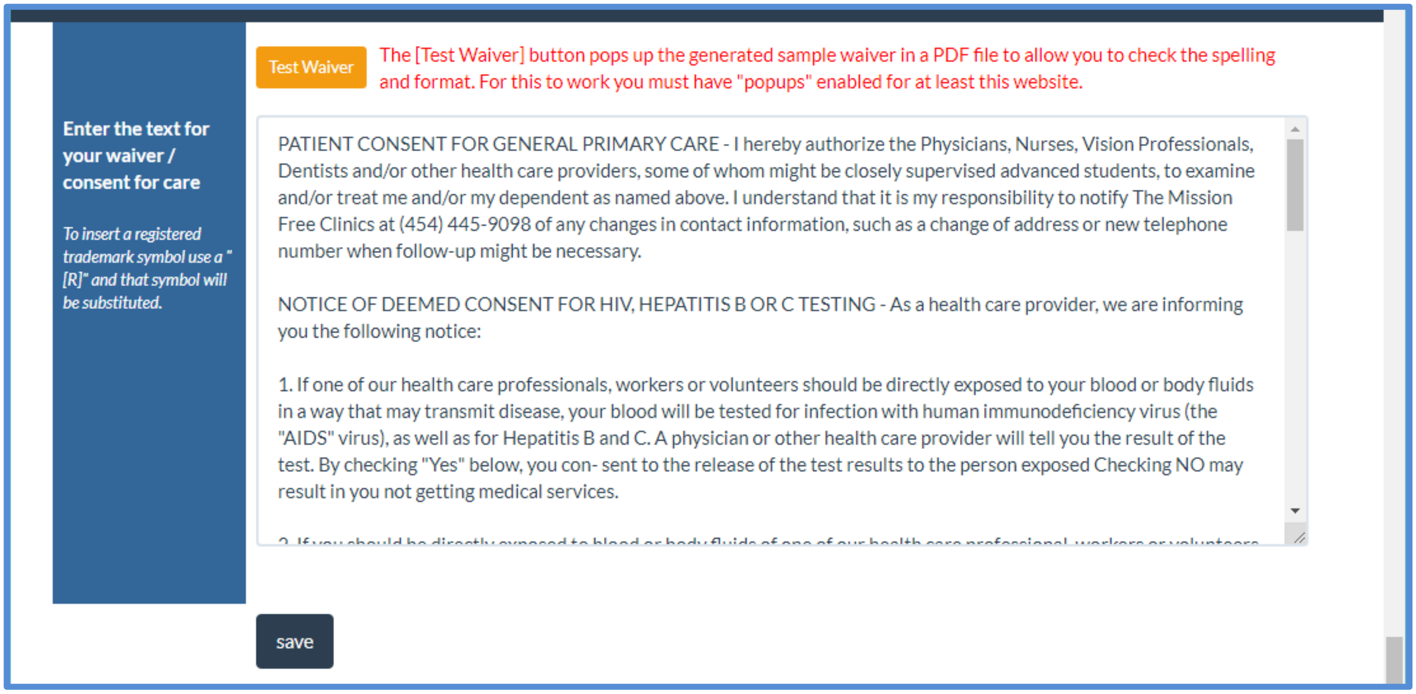
Waiver Group Name This is the name which will show up at the top of the generated PDF of the waiver for the patient. The waiver PDF will also include your logo. Note that you may include a "[R]" in the document to have the registered trademark symbol inserted at that location.

Waiver/ Consent Title This title shows up in the PDF and on the mobile device at the top of the waiver section they are going to sign.



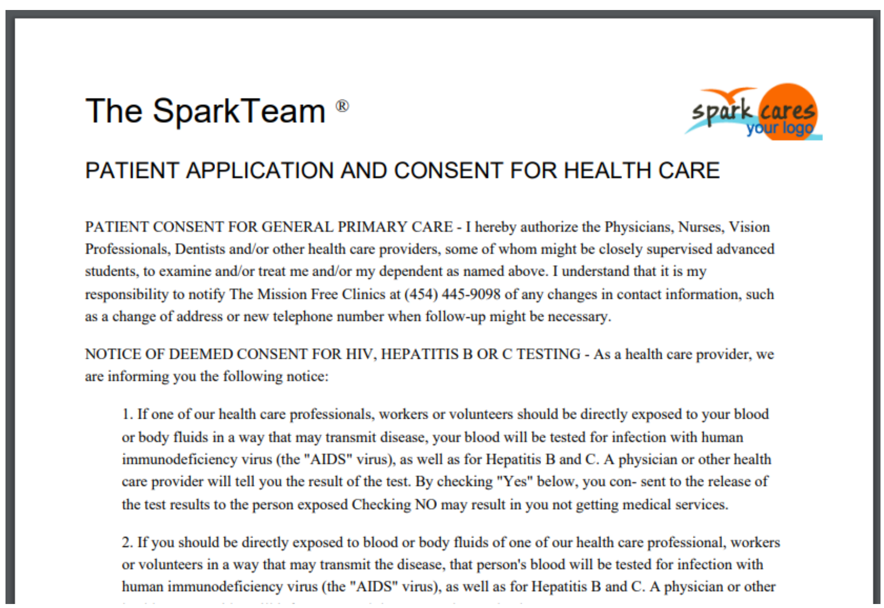
Waiver As Of Date You may need to change your waiver periodically. If a patient has signed an old version, before this date, with their profile a message will flash up as they register that they will need a new waiver signed. Probably on paper.

Paper Waiver Doc The PaRIS document management system (see details at Paper Document Management – Identifying the type of form on page 68) allows you to identify the patient consent form when uploaded into PaRIS. If you identify that form here we will also mark this form with that same identifying information.



[Test Waiver] button Pressing this button will generate a sample PDF of your waiver, and display it, so you are able to check the formatting and wording.

The system attempts to recognize numbered lists, and bullets, to generate a better format.


The SparkTeam ®

PATIENT APPLICATION AND CONSENT FOR HEALTH CARE

PATIENT CONSENT FOR GENERAL PRIMARY CARE - I hereby authorize the Physicians, Nurses, Vision Professionals, Dentists and/or other health care providers, some of whom might be closely supervised advanced students, to examine and/or treat me and/or my dependent as named above. I understand that it is my responsibility to notify The Mission Free Clinics at (454) 445-9098 of any changes in contact information, such as a change of address or new telephone number when follow-up might be necessary.

NOTICE OF DEEMED CONSENT FOR HIV, HEPATITIS B OR C TESTING - As a health care provider, we are informing you the following notice:

1. If one of our health care professionals, workers or volunteers should be directly exposed to your blood or body fluids in a way that may transmit disease, your blood will be tested for infection with human immunodeficiency virus (the "AIDS" virus), as well as for Hepatitis B and C. A physician or other health care provider will tell you the result of the test. By checking "Yes" below, you con- sent to the release of the test results to the person exposed Checking NO may result in you not getting medical services.

2. If you should be directly exposed to blood or body fluids of one of our health care professional, workers or volunteers in a way that may transmit the disease, that person's blood will be tested for infection with human immunodeficiency virus (the "AIDS" virus), as well as for Hepatitis B and C. A physician or other

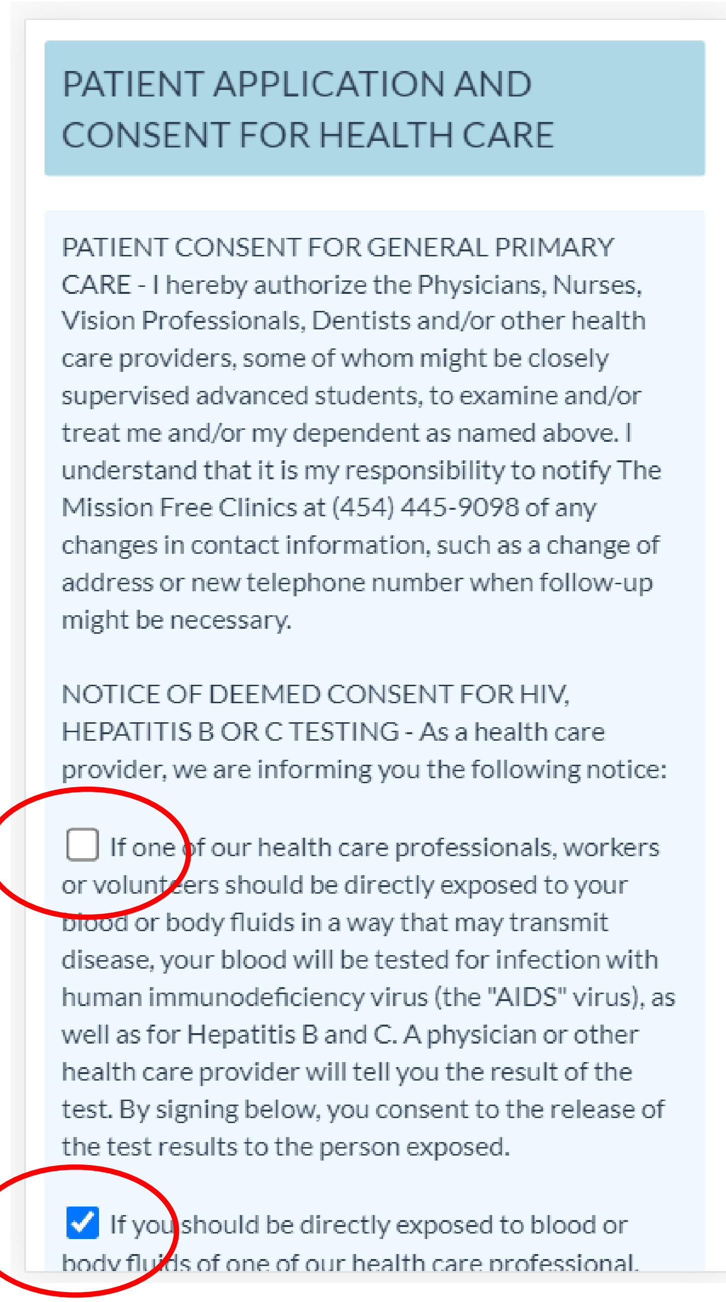
ADDING CHECKBOXES TO THE PATIENT WAIVER FORM

Sometimes in your patient waiver there are certain sections you want to make sure a patient has read. There may be a concern that patients will just scroll to the bottom and sign it, without understanding key details. To help with this you may insert checkboxes into the document at any location. To do this simply insert "[[]]" (two left square brackets followed by two right square brackets) anywhere in the text of your waiver. These will be converted to checkboxes in the waiver when it is presented in the profile to be signed.

Checkboxes must be signed to continue. There are no optional checkboxes. If the checkbox is now checked there will be an error message generated informing the patient they must check the box to continue.

An example is shown on the right.

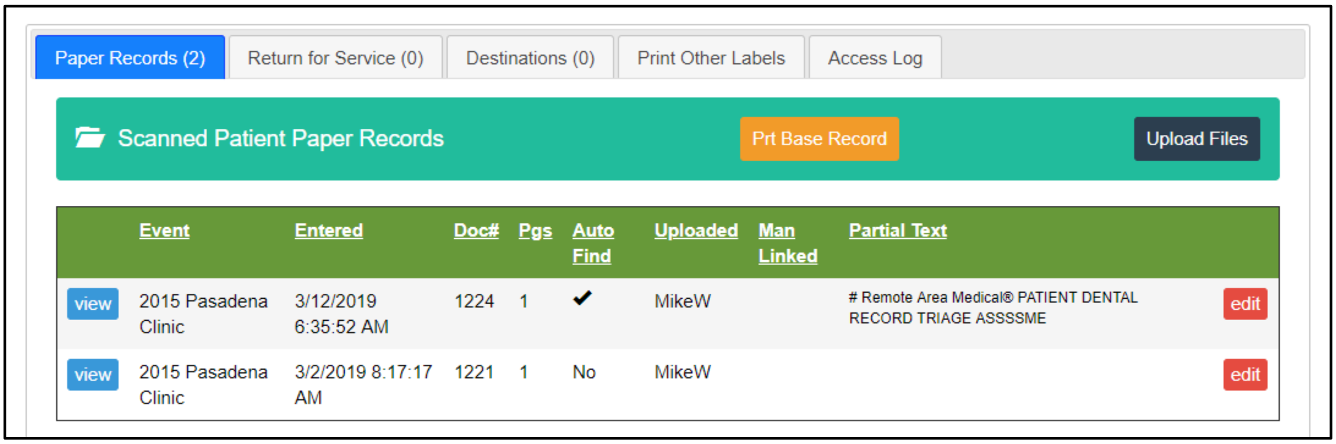
You may insert any number of checkboxes in your waiver document.

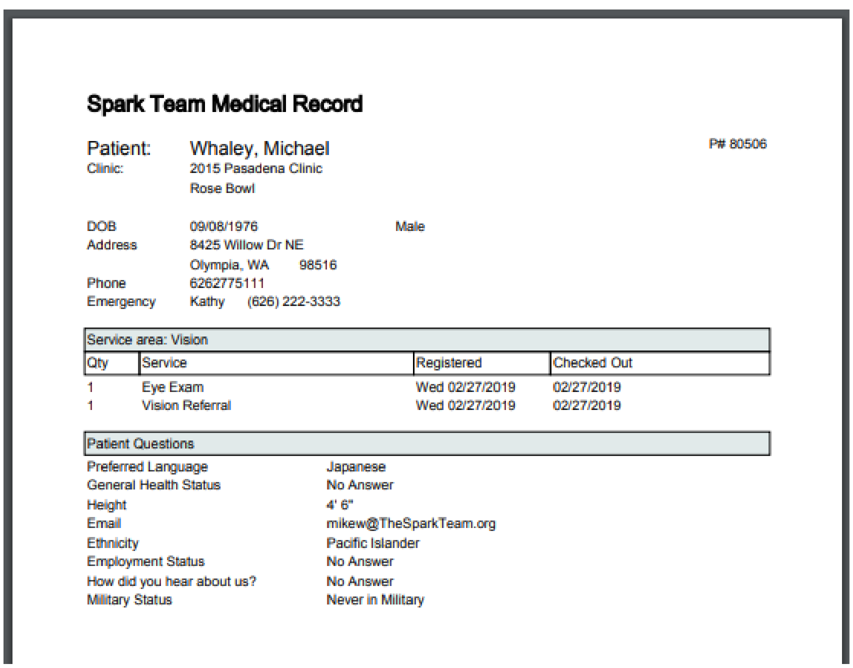


SENDING PATIENT MEDICAL RECORDS FOR A REFERRAL

Patient medical records may be exported to send as part of a referral or to a patient if requested. If you are sending data to a HIPAA Entity it is your responsibility to encrypt or make the transfer safe.

PaRIS allows you to export the base medical record to a PDF file. To do this open the patient's medical record using a name search or one of the other patient searches. Toward the bottom of the page you will see the TAB area of their associated medical record. Under the PAPER RECORDS tab you will see the orange [PRT BASE RECORD] button. Click on this to export their base medical record and all their services to a PDF file (see below). In addition, you may open and print their scanned paper records for more details.





Spark Team Medical Record

Patient: Whaley, Michael — P# 80506
Clinic: 2015 Pasadena Clinic
Rose Bowl

DOB 09/08/1976 Male
Address 8425 Willow Dr NE
Olympia, WA 98516
Phone 6262775111
Emergency Kathy (626) 222-3333

Service area: Vision

Qty	Service	Registered	Checked Out
1	Eye Exam	Wed 02/27/2019	02/27/2019
1	Vision Referral	Wed 02/27/2019	02/27/2019

Patient Questions

Preferred Language	Japanese
General Health Status	No Answer
Height	4' 6"
Email	mikew@TheSparkTeam.org
Ethnicity	Pacific Islander
Employment Status	No Answer
How did you hear about us?	No Answer
Military Status	Never in Military

PARIS MOBILE WEB APP – REPORTS

PaRIS comes with a mobile web app (smartphone sized website) which provides real time reporting for your clinics plus some helpful functionality. This reporting feature accesses your clinic numbers in real time providing up to the minute status for registration and services.

You have complete control over the passwords to access this system, which reports show up in the system, and the order they appear.

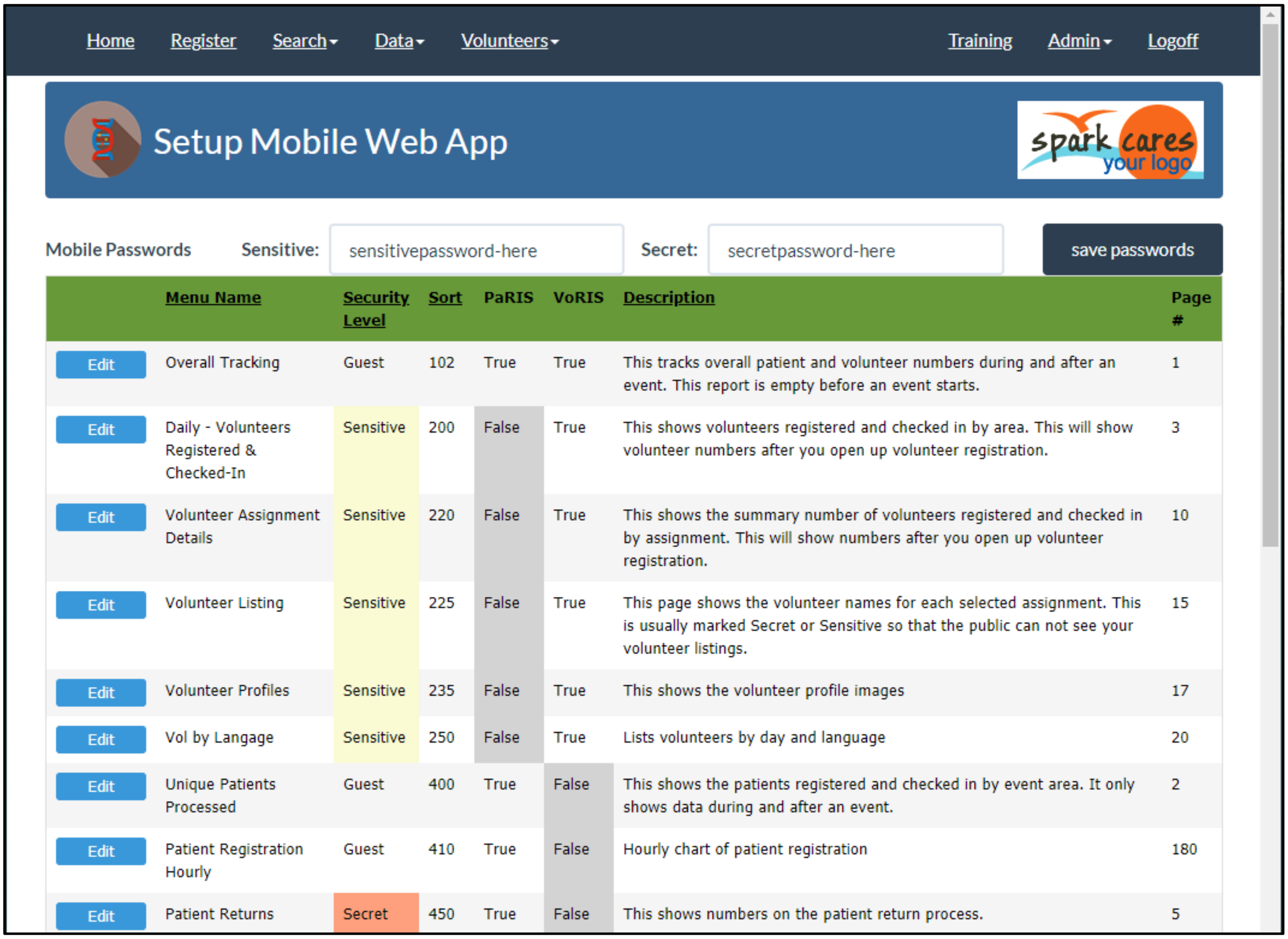
ACCESSING YOUR MOBILE WEB APP

Your mobile web app is located at the same website URL as your PaRIS system. Just append **/mobile** to your website address.

So if your PaRIS website is: http://paris.HelpingNeighbors.org

Then your mobile web app is: http://paris.HelpingNeighbors.org/mobile

Use menu: **Admin → Mobile Control**



	Menu Name	Security Level	Sort	PaRIS	VoRIS	Description	Page #
Edit	Overall Tracking	Guest	102	True	True	This tracks overall patient and volunteer numbers during and after an event. This report is empty before an event starts.	1
Edit	Daily - Volunteers Registered & Checked-In	Sensitive	200	False	True	This shows volunteers registered and checked in by area. This will show volunteer numbers after you open up volunteer registration.	3
Edit	Volunteer Assignment Details	Sensitive	220	False	True	This shows the summary number of volunteers registered and checked in by assignment. This will show numbers after you open up volunteer registration.	10
Edit	Volunteer Listing	Sensitive	225	False	True	This page shows the volunteer names for each selected assignment. This is usually marked Secret or Sensitive so that the public can not see your volunteer listings.	15
Edit	Volunteer Profiles	Sensitive	235	False	True	This shows the volunteer profile images	17
Edit	Vol by Langage	Sensitive	250	False	True	Lists volunteers by day and language	20
Edit	Unique Patients Processed	Guest	400	True	False	This shows the patients registered and checked in by event area. It only shows data during and after an event.	2
Edit	Patient Registration Hourly	Guest	410	True	False	Hourly chart of patient registration	180
Edit	Patient Returns	Secret	450	True	False	This shows numbers on the patient return process.	5

Type in your two passwords and press the [save passwords] button.

All of the mobile reports are shown in the list as seen above. As of now there are 37 mobile reports and functions available. Each may have the sort order defined and the security level.

If you are also a VoRIS user (Spark volunteer system) the mobile web app also shows real time information on your volunteers. Who has registered, who has checked in, counts, etc…

SECURITY

Security is one of the major advantages of PaRIS. Having the data out of the clinic in a secure cloud-based system is much more secure than using an on-site server sitting around with sensitive patient data. On-site servers can be stolen, damaged, and/or accessed for patient data directly.

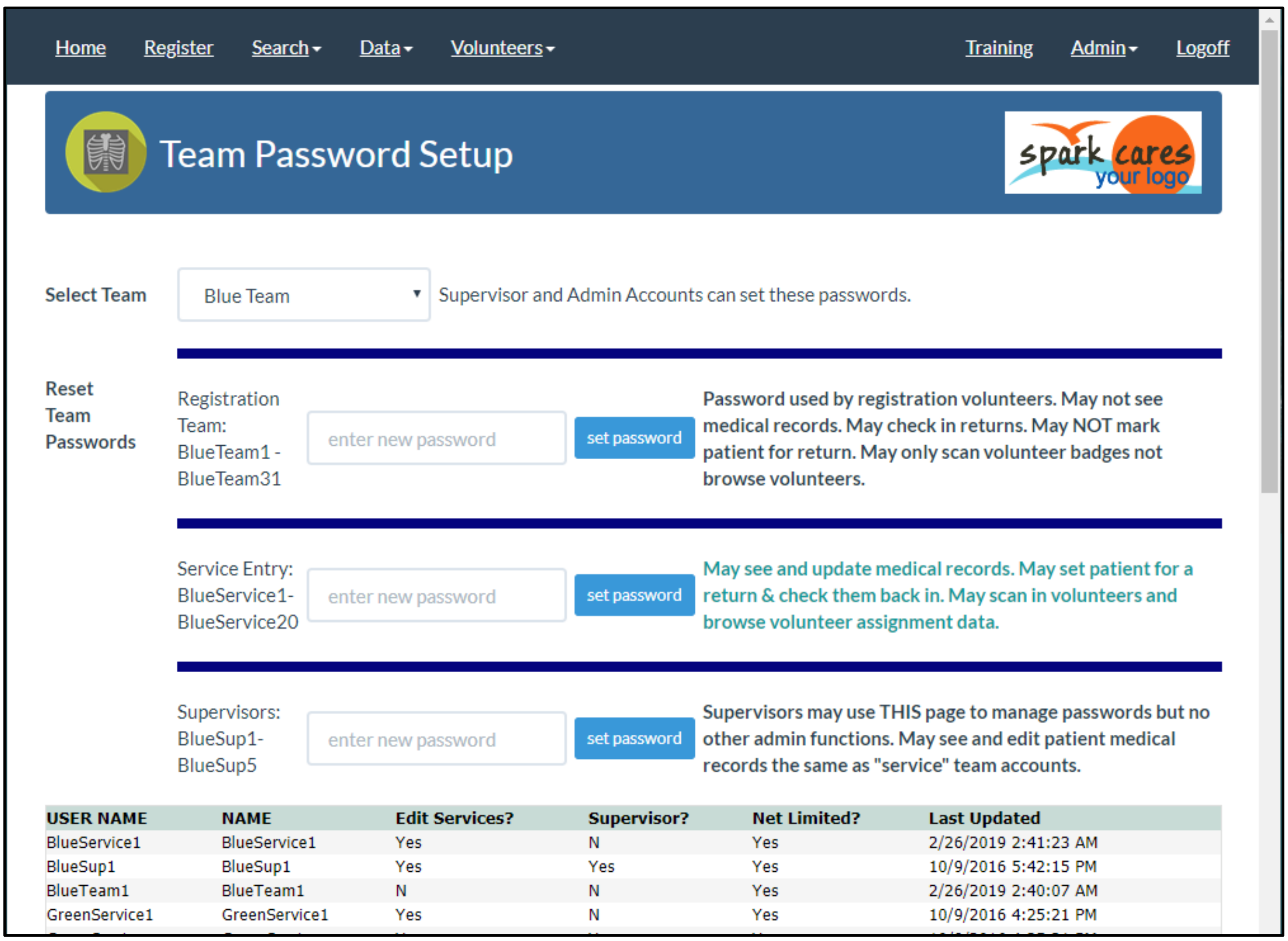
VOLUNTEER USER ACCOUNTS AT CLINICS (NOT ADMINISTRATORS)

The volunteer users are now broken up into teams. There is a blue team, red and green team. There is no difference in the color team accounts but when several clinics are open at the same time you may wish to have them on separate accounts.

There is also strict *network* security for the teams. See the section on Network Setup and Security. A team account will only connect to PaRIS on the clinic's network. It can't be used in a volunteer's home, on their smartphone or at another clinic. This is very secure while being very easy to setup.

All access is logged and things tracked with logs you can review yourself.

To set User Account passwords use menu: Admin → Team Passwords



At the top of the page select the color team.

Type a password into one of the three boxes and press the blue Set Password button.

TEAM FUNCTIONALITY GRID

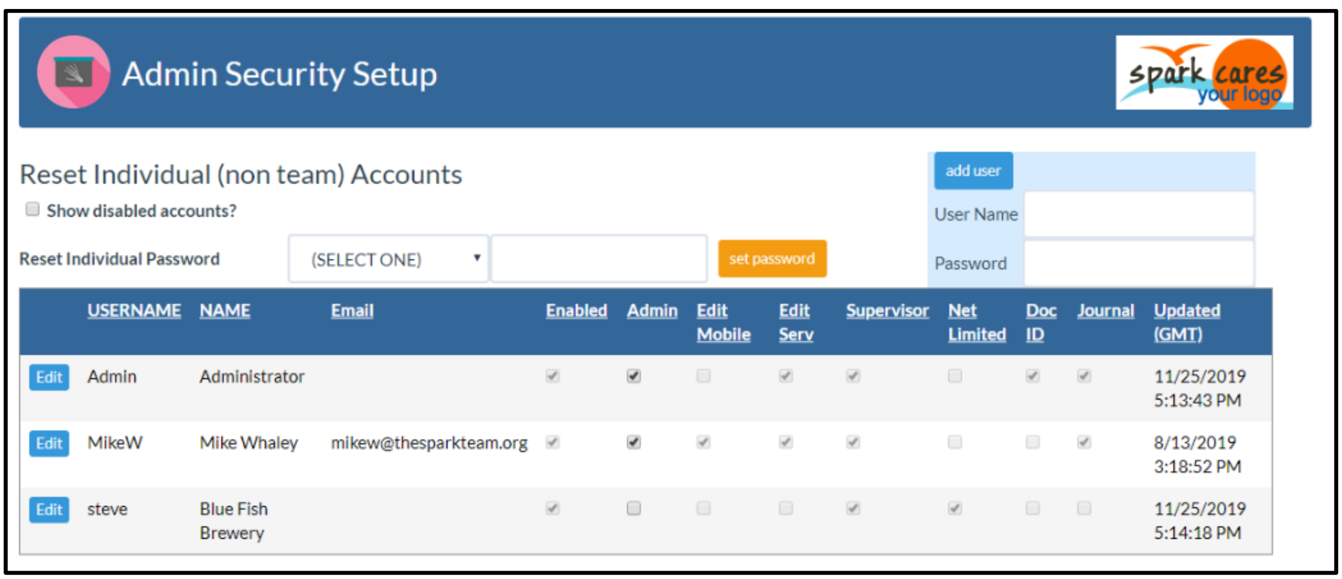
Function	Registration Team	Service Team	Supervisors
May register new patients	Yes	Yes	Yes
May add a new day to a patient's record	Yes	Yes	Yes
May see patient medical records		Yes	Yes
May assign patients for Return for Care the next day		Yes	Yes
May check patients back in for Return for Care	Yes	Yes	Yes
May do name searches for patients	Yes	Yes	Yes
May do full text searches for patients including phone numbers, addresses, emergency contact names.		Yes	Yes
May search for patients by type of medical service		Yes	Yes
May search for scanned paper documents		Yes	Yes
May enter new services for patients		Yes	Yes
May set Return for Care – check out patients to return another day		Yes	Yes
May set items to be sent out – Destination Processing		Yes	Yes
May scan paper forms into the system		Yes	Yes
May see the reports and exports section			
May set team passwords			Yes
May edit what services are available			
May view-only the services setup page			Yes
May edit patient questions			
May setup new clinics			
May see and edit patient alerts			Yes
May set team passwords			Yes
May setup network security for teams (adding a clinic network)			Yes
May use PaRIS administrator page			
Volunteer System Functionality			
May check in Volunteers from PaRIS (if you also use VoRIS)	Yes	Yes	Yes
May search for volunteers from PaRIS (if you also use VoRIS		Yes	Yes
May get volunteer assignment counts and counts of checked in volunteers from PaRIS		Yes	Yes

The administrator security is setup at menu: Admin → Admin Security

Only user accounts with the Admin authority may view and use this page.

Functionality Name	Gives access to the following
Enabled	Allows the user to logon
Admin	Gives access to all functionality in the system.
Edit Mobile	Allows the user to edit the controls for the mobile web app. Can they define the security level for the pages, control the order of the pages.
Edit Serv	This allows the user to edit the available services. They can set their order on the services entry page, add new services, delete services, and change the value of the services.
Supervisor	Can they set the team passwords and set the security for the clinic networks.
Net Limited	If checked they can only logon at clinics, not from their home, office, or phone. If not checked the person can use this PaRIS account to logon to the system from anywhere.
Doc ID	Is this user able to setup the document identification rules? All ADMINS can already do this. If the user account is not a full Admin you may set this ON to allow them to edit and test the document identification rules.
Journal	If checked they have access to the PaRIS Journal process. This allows you to upload pictures and submit reports associated with a specific clinic.

Your system supports any number of named users.

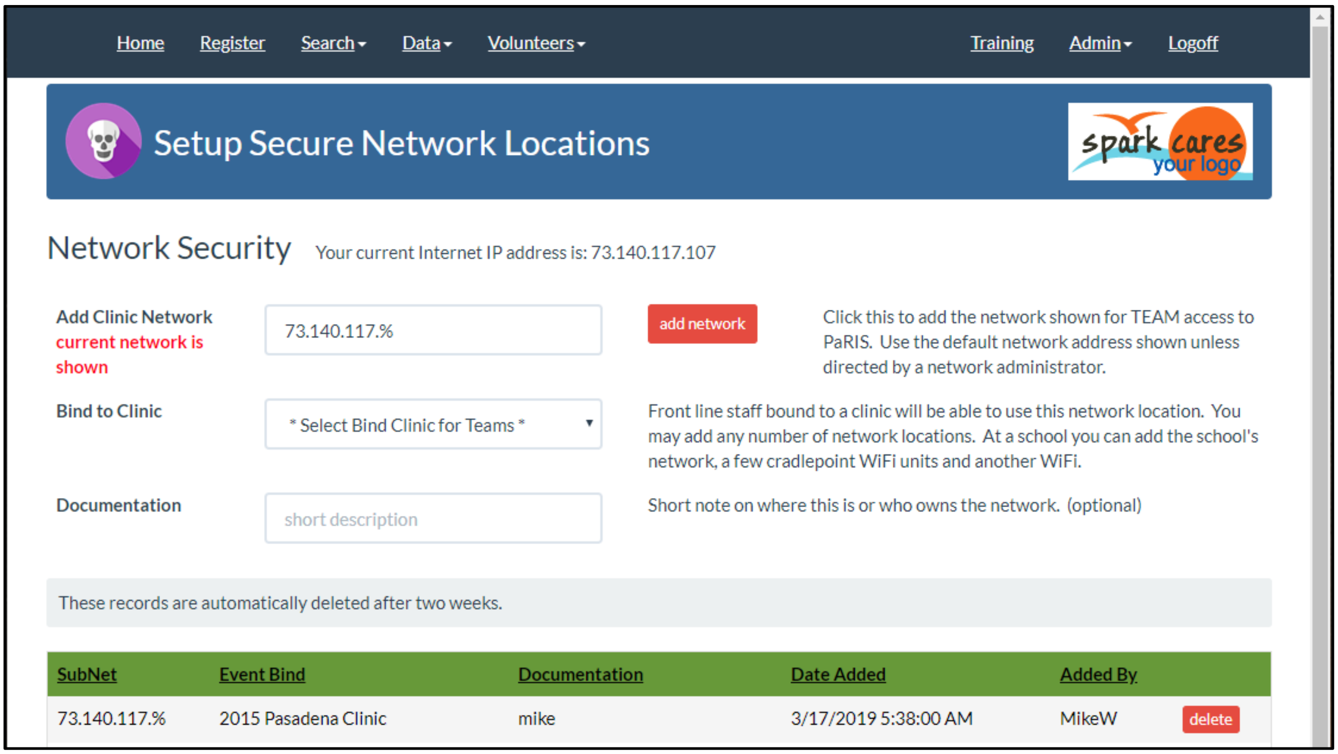


SETTING UP CLINIC NETWORKS

This means your volunteers can't use the passwords you give them after the clinic from their hotel room, from home, from their phones, etc…

Part of PaRIS security is network access security. At your clinics you may be having teams of volunteers accessing your system and you want to make sure they are only using those accounts while they are supervised at your clinic. With PaRIS you define not only the passwords for your volunteers but you also define the network location which can use those accounts.

To define a network for your clinic use menu: **Admin → Network Security**



Once at your clinic an admin needs to logon and open this page. The ADD CLINIC NETWORK is filled in with the current network. Set the BIND TO CLINIC to be the correct clinic and type in a short description of the network (optional). Click the red [Add Network] button.

Now your team accounts can use PaRIS at that location.

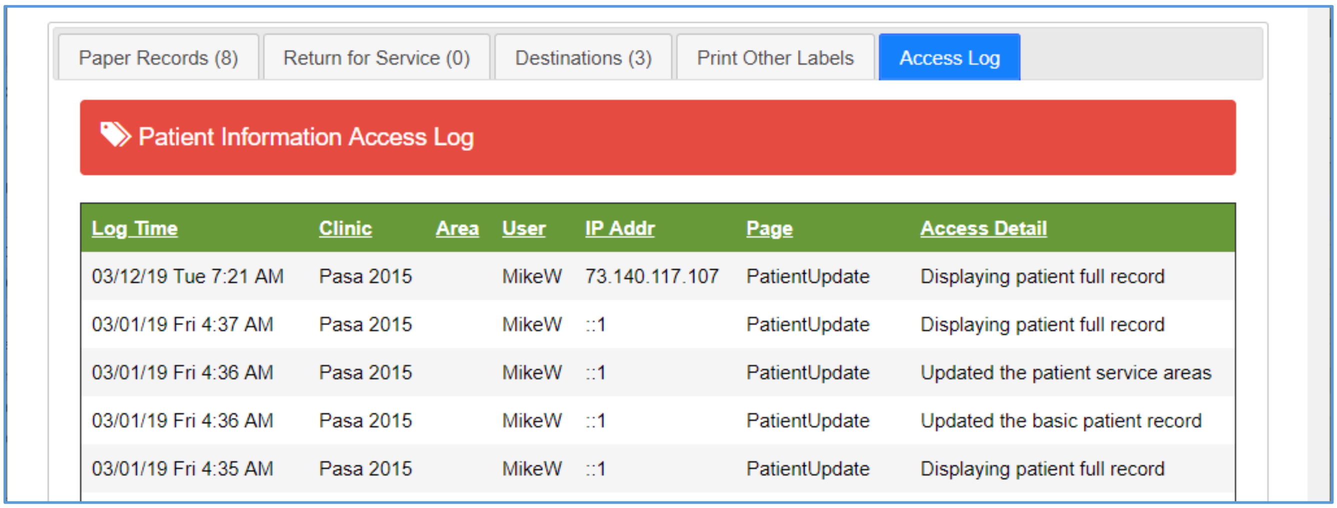
NOTE: At some clinic locations you may have several networks. Some high schools may have you spread out in different buildings, or your clinic may be spread out over a large series of community center buildings. If they are supported by multiple networks just perform the above procedure binding all the networks to the same clinic.

PATIENT RECORD SECURITY – ACCESS LOGS

MEDICAL RECORD ACCESS LOGS

PaRIS security logging has been updated to track patient record access. The access log is displayed in the patient detail record, at the bottom of the page. Front line volunteers only doing patient registration can not see this information.

This log can only be seen by PaRIS users who have the Edit Serv option setup. This means that typically the front line volunteers registering your patients can not see this information.



Log Time	Clinic	Area	User	IP Addr	Page	Access Detail
03/12/19 Tue 7:21 AM	Pasa 2015		MikeW	73.140.117.107	PatientUpdate	Displaying patient full record
03/01/19 Fri 4:37 AM	Pasa 2015		MikeW	::1	PatientUpdate	Displaying patient full record
03/01/19 Fri 4:36 AM	Pasa 2015		MikeW	::1	PatientUpdate	Updated the patient service areas
03/01/19 Fri 4:36 AM	Pasa 2015		MikeW	::1	PatientUpdate	Updated the basic patient record
03/01/19 Fri 4:35 AM	Pasa 2015		MikeW	::1	PatientUpdate	Displaying patient full record

This log can also help track down issues with registration mistakes or situation where additional training might be needed.

REPORTS AND EXPORTS -- ACCESS LOGGING

All access to PaRIS exports and built in reports is also logged. Who accessed the information and when.

PATIENT PAPER RECORDS – ACCESS LOGGING

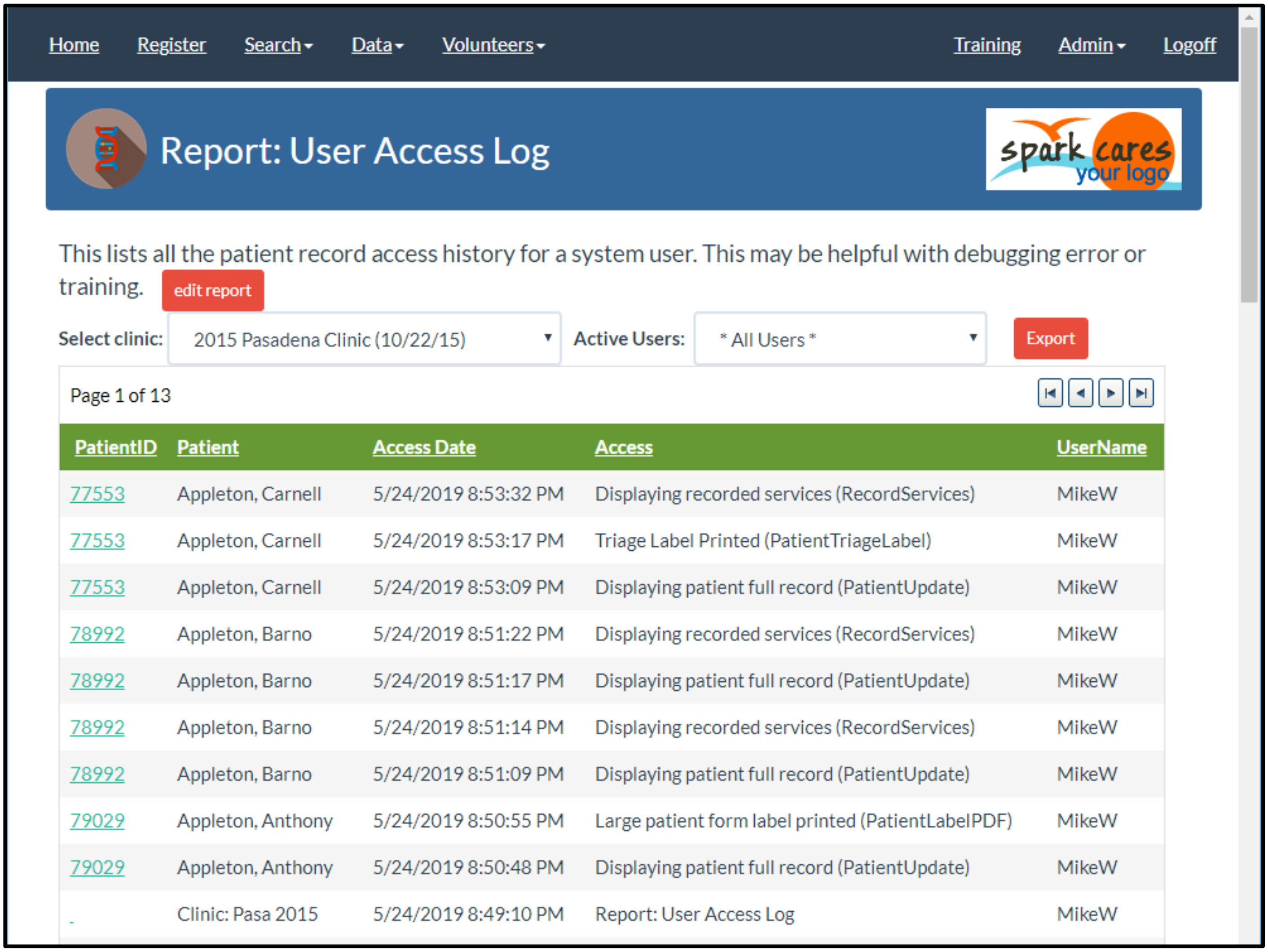
All displays of uploaded paper records is logged. Who accessed the documents and when.

VIEWING A USER'S MEDICAL RECORD ACCESS LOG

There is a report allowing you to display all the medical record access history for a specific PaRIS user. This may be helpful when trying to debug problems or find you have training issues.

This report is found at the menu: **Data → Reports / Exports**   and select report *User Access Log*

There is a dropdown list allowing you to select an individual user to view and export their activity.



Home   Register   Search▾   Data▾   Volunteers▾   Training   Admin▾   Logoff

Report: User Access Log

spark cares your logo

This lists all the patient record access history for a system user. This may be helpful with debugging error or training. edit report

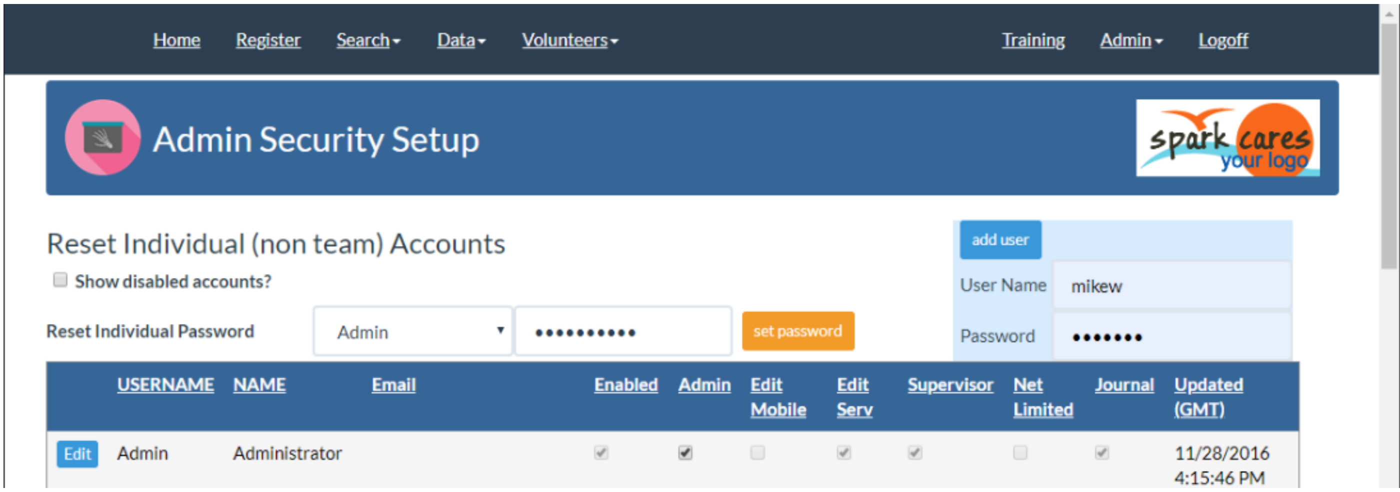
Select clinic: 2015 Pasadena Clinic (10/22/15)   Active Users: * All Users *   Export

Page 1 of 13

PatientID	Patient	Access Date	Access	UserName
77553	Appleton, Carnell	5/24/2019 8:53:32 PM	Displaying recorded services (RecordServices)	MikeW
77553	Appleton, Carnell	5/24/2019 8:53:17 PM	Triage Label Printed (PatientTriageLabel)	MikeW
77553	Appleton, Carnell	5/24/2019 8:53:09 PM	Displaying patient full record (PatientUpdate)	MikeW
78992	Appleton, Barno	5/24/2019 8:51:22 PM	Displaying recorded services (RecordServices)	MikeW
78992	Appleton, Barno	5/24/2019 8:51:17 PM	Displaying patient full record (PatientUpdate)	MikeW
78992	Appleton, Barno	5/24/2019 8:51:14 PM	Displaying recorded services (RecordServices)	MikeW
78992	Appleton, Barno	5/24/2019 8:51:09 PM	Displaying patient full record (PatientUpdate)	MikeW
79029	Appleton, Anthony	5/24/2019 8:50:55 PM	Large patient form label printed (PatientLabelPDF)	MikeW
79029	Appleton, Anthony	5/24/2019 8:50:48 PM	Displaying patient full record (PatientUpdate)	MikeW
-	Clinic: Pasa 2015	5/24/2019 8:49:10 PM	Report: User Access Log	MikeW

SETTING YOUR ADMIN USER PASSWORD

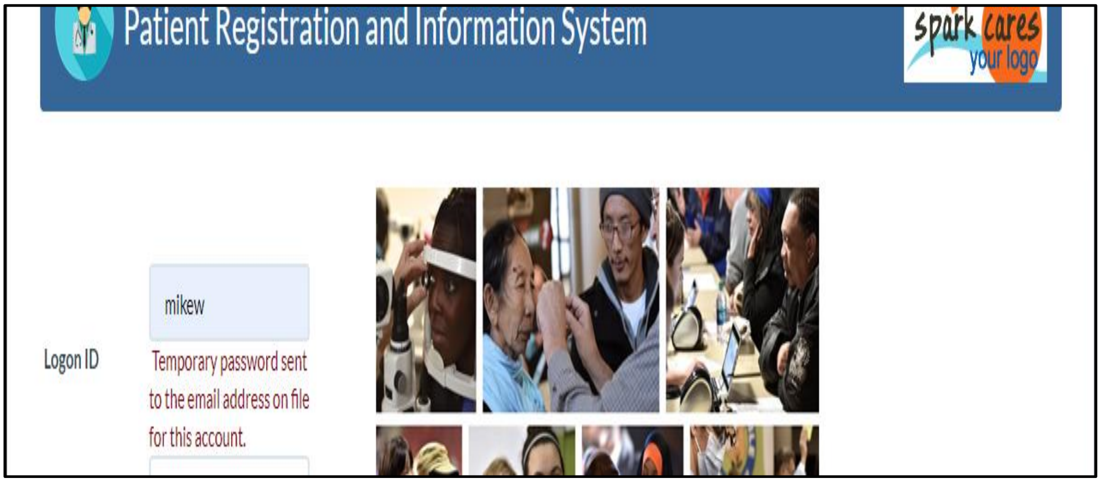
The TEAM user accounts are all set all at once. But individual "named" administrator accounts may have their passwords set individually.



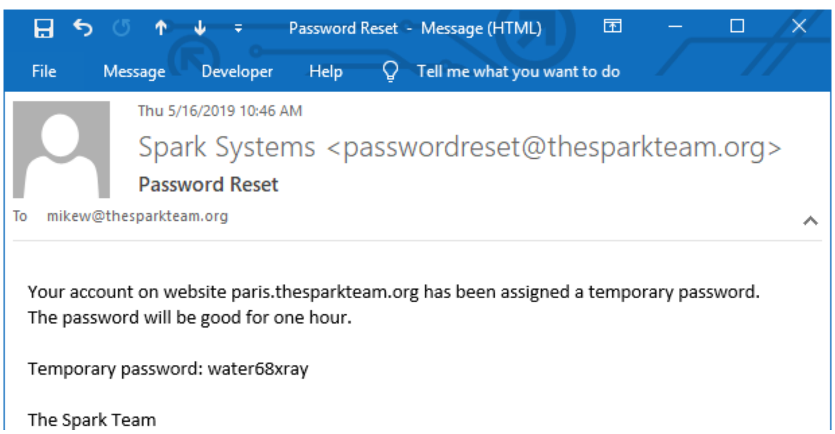
To set an account's password select the account in the drop down list (shown as Admin above). Then type in the user password and click the [set password] button.

ADMINISTRATORS FORGOT THEIR PASSWORDS – PASSWORD RECOVERY

Administrators may click the red [recover password] button on the logon page if they forget their password. If they have an email address defined with their administrator account the system will generate a temporary password and email it to them. This password is good for one hour and gives them the opportunity to update the permanent password.

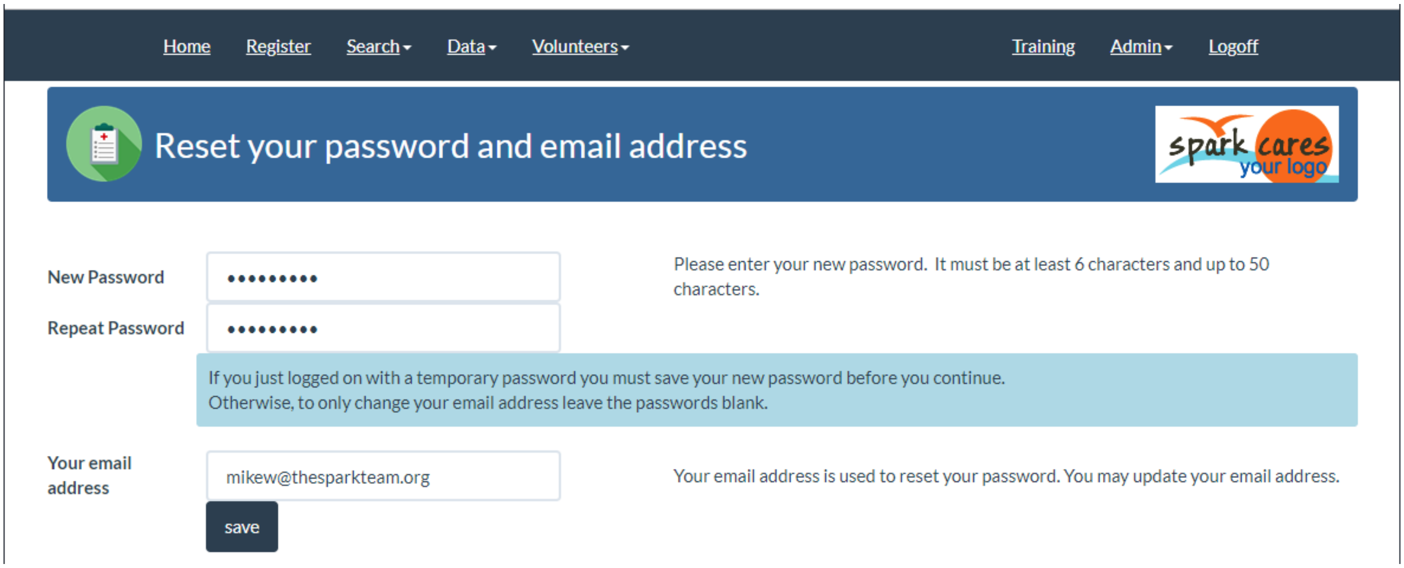


The email will come from email address passwordreset@thesparkteam.org.



ADMINISTRATORS RESETTING THEIR OWN PASSWORDS & EMAIL ADDRESSES

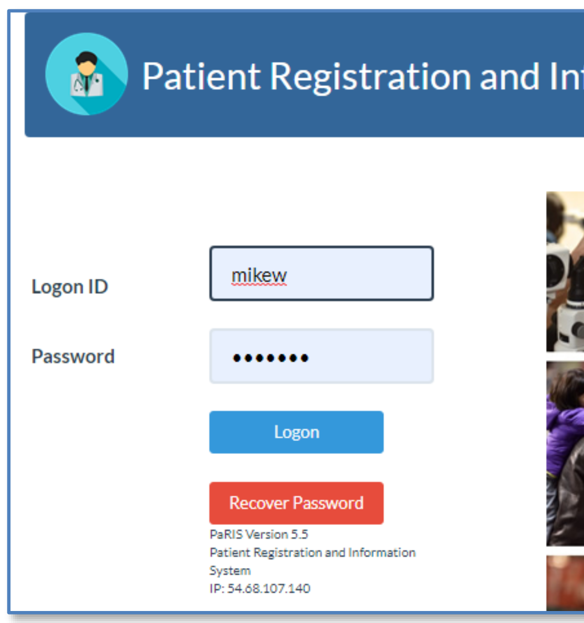
Menu item Admin → Your password and email



PASSWORD RECOVERY FOR ADMINISTRATORS

If an administrator account has an associated email address that administrator may now recover their PaRIS password using the red [Recover Password] button on the logon screen. Click on the button and a temporary password good for 1 hours will be emailed to you. Once you logon you will be prompted to set your permanent password.

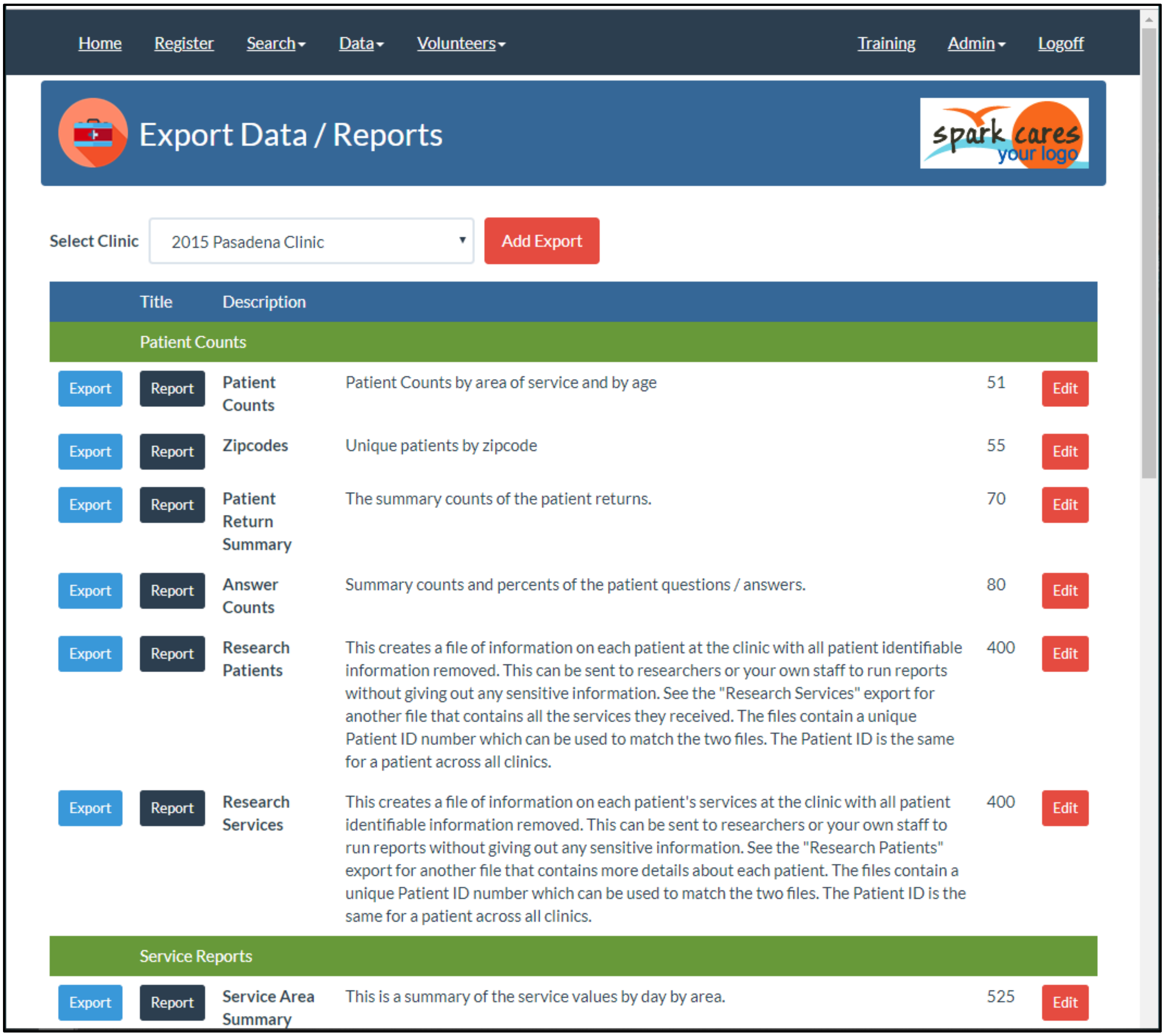
Restricted front line volunteer accounts, which are network restricted, are not able to use this facility. This is only available to pull PaRIS administrators.



EXPORTING PARIS DATA

PaRIS provides a wide variety of data exports which can pull data into Excel or other tools for further analysis. While there are several of these exports built into PaRIS we can also add exports to provide other views of your data. Please contact us at email: exports@TheSparkTeam.org to request additional views of your data. These custom exports are no extra charge if the data view is possible.

To see the current data exports and reports see menu: **Data → Reports / Exports**



IMPORTING PATIENTS FROM A SPREADSHEET

The full PaRIS patient medical record is too complex to enter on a spreadsheet and import but in some cases it is helpful to just get the names and addresses loaded into the system. Or you may be working remotely without an Internet connection and want to at least capture patient names to later load into PaRIS.

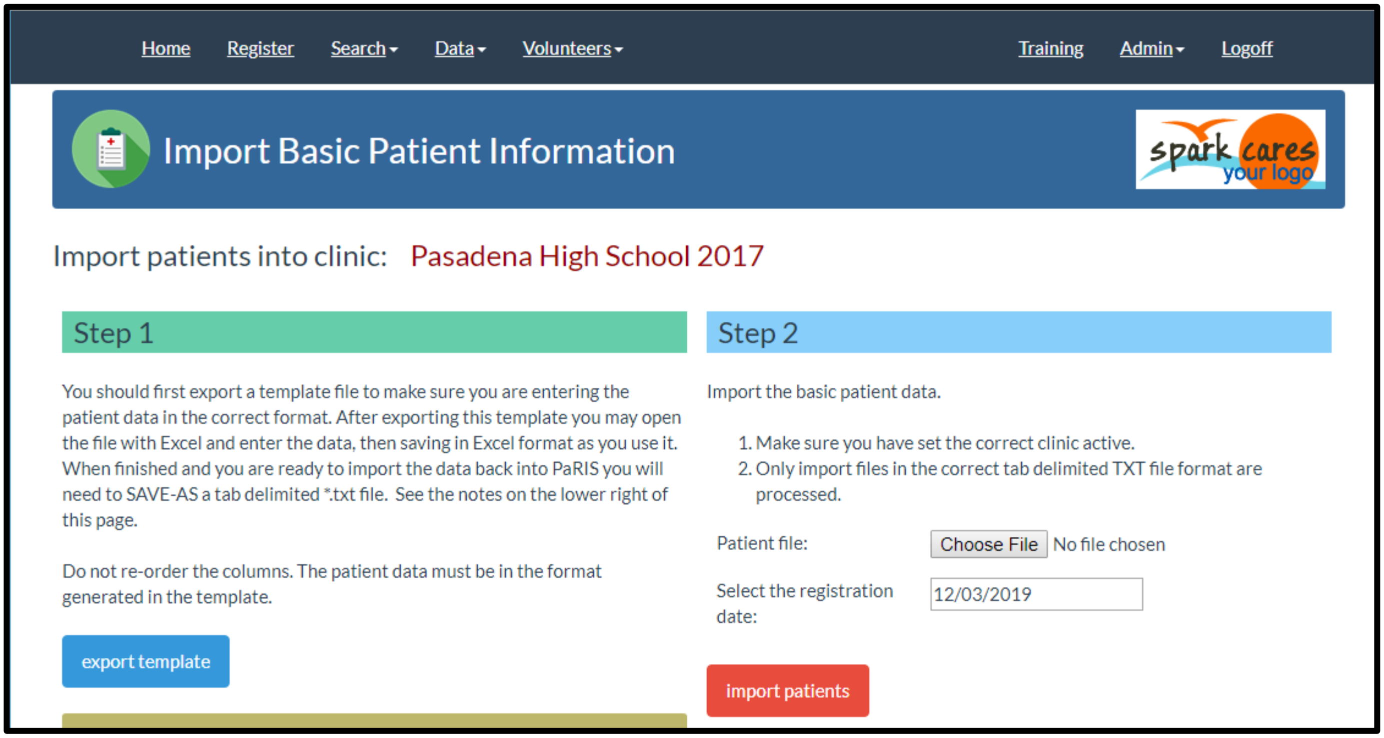
These are the steps to importing the basic patient records.

1. Export the patient data template. The import process requires a very specific format for the patient data so you need to start from the exported sample template.
    a. In PaRIS use the [Data] menu, option [Import Patients]
    b. Export the CSV format file.
2. Open in Excel (or some other spreadsheet).
    a. You may format the spreadsheet, change colors, change column headings.
    b. You may not re-order the columns.
    c. You may insert new columns after the 12 required columns for your own documentation. These additional columns are ignored when importing the patient records.
3. Enter your patient records.
    a. Each spreadsheet should contain only one day of registration. For example, if you have a three day clinic on a Tuesday, Wednesday, and Thursday, you will have three different spreadsheets. One for each day of patients.
    b. The same patients may be in multiple files. If the patient name, date of birth, and state are the same in the different files then only one patient is created with multiple registrations/service days.
4. In Excel SAVE-AS the data into tab delimited format. This creates a file with a *.txt extension.

Continue on the next page

To import the patients once your spreadsheet of data is exported into the tab delimited format use the menu:

Data → Import Patients



Click the [Choose File] button and use the file dialog to find your *.txt file.

Enter the registration data. Remember that patients are always tracked by their registration date. Therefore you need to have a separate spreadsheet for each clinic day. See the section on entering data with multiple spreadsheets in this document.

> Example: Your clinic is at a remote location on Friday, Nov 13th, 2019. You capture the data in a spreadsheet and a few days later you are at a hotel with Internet access. Upload the captured spreadsheet data specifying Nov 13th as the registration date.
>
> If you also captured patients on Nov 14th, 2019 remember to put those in a separate file and upload them later with the Nov 14th registration date.

IMPORT FILE DATA FORMATTING NOTES:

1. The columns of data must be in the same order as in the exported template file. Please start the process with the step 1 template file.
2. The first and last name must be entered. Anything over 50 characters for each is truncated.
3. The date of birth must be entered in this mm/dd/yyyy format. Invalid dates are set to 01/01/1930.
4. The gender must be M or F. Invalid values are set to F.

5. The Address 1 and 2 columns are optional and will be truncated if over 50 characters.
6. The City is optional and is truncated if over 25 characters.
7. The State is the 2 character abbreviation for the state. Other countries also have 2 character state and province codes. If the value is invalid it is set to 'WA'.
8. The zipcode may be up to 10 characters or it is truncated.
9. The phone may be in any format and is truncated to 25 characters.
10. The Emergency Contact name is optional and is truncated to 40 characters.
11. The Emergency Contact Phone is optional and is truncated to 25 characters.

FILE FORMAT NOTES:

1. The import file must be end in *.txt and be a text (tab delimited) file.
2. To do this open your file in Excel, click SAVE-AS, and change the "save as type" to "Text (Tab delimited)".
3. The first row is expected to be the column headings. The wording of the headings does not matter so you may change them to make it easier for your volunteers to enter data.
4. The data file must contain all 12 columns of data on every row even if the value is empty.

DUPLICATE PATIENTS

The import process will try to match the patient's name and date of birth. If a duplicate is found, and the state value code is the same, it will assume it is the same patient and add this clinic and registration date to their medical record.

If you try to upload the same patient for the same registration date that new patient upload record is ignored.

MULTIPLE INPUT WORKSTATIONS

You might need to register patients on more than one laptop. When this happens you will have two or more spreadsheets per day. You may simply upload each one separately. You do not need to try to merge the spreadsheets.

SELECTING A PAPER DOCUMENT SCANNER

Any scanner that reads documents and converts them to PDF files is acceptable. We ask that you turn off the scanner's OCR features so that is not a required option for the scanner you select.

The Fujitsu ScanSnap IX500 is used by many PaRIS users as it is inexpensive, less than $500, fast, quiet, portable, and easy to use.

The ScanSnap also has the automatic file naming option.

The setup for the document scanner requires the following options. So when selecting a document scanner check this list.

1. The ability to scan front and back.
2. The ability to scan multiple pages into a single PDF file.
3. The ability to do OCR scans, sometimes called creating a "searchable PDF", is not required and should be turned off if the scanner supports it.
4. Color compression is a handy feature. This can drastically reduce the size of the scanned documents. Many patient forms are printed on color paper to help organize them. If the documents are really large and will take longer to upload.
5. The scanner should have the option of automatically determining the size of the paper. If you scan smaller prescriptions or notes there is no reason to turn that into a full page once scanned.

You may already have a high-speed copier in your office that can also be used to scan patient documents to PDF files.

SELECTING A HAND-HELD BARCODE SCANNER

USB barcode scanners are cheap and widely available. The only requirement is that they are able to scan 1D barcodes generated by the PaRIS system. Scanning the barcodes makes it much more reliable and faster entering services, checking in patients, using the DESTINATION part of the system and the RETURN FOR CARE process.

The only setup is that the barcode scanner be configured to add a CARRIAGE RETURN to the end of each scan. Many come pre-configured this way but some may have a simple one-time configuration needed.

It is also more productive if the barcode has a stand like the image shown here. That way you don't need to pick up the scanner, just wave the forms under the scanner and enter the data.

SELECTING A BARCODE SCANNER FOR THE PATIENT PROFILE PROCESS

If your patients are generating profiles on their smartphones to speed up patient registration (for social distancing) there are several things to consider. If you have decided to generate QR Codes instead of the one dimension barcodes then you need a scanner capable of reading 2D barcodes. These usually cost $5 to $10 more but reading the QR codes may be slightly more reliable when scanning older smartphone displays.

One dimension barcode (1D)

QR Code (2D)

PROBLEMS READING BARCODES ON SMARTPHONES

There are two kinds of inexpensive handheld barcode readers. For paper there is no difference, both kinds of scanner technologies work fine, but under glass (on smartphones) the laser type does not work reliably.

Laser barcode scanners

These scanners use a very low powered laser to sweep a laser (red dot) back and forth across the barcode, reflecting back to a sensor on the barcode reader. These show up as a narrow red line when pointed at something. These work great on paper and have the nice aiming point. These have been around the longest since the computing power required is just basically a timing algorithm. Unfortunately glass, and smartphone displays, don't reliably bounce the laser light back to the detector on the scanner. So they don't work as reliably on phones.

Image or CCD barcode scanner

Outwardly these look the same. Small, handheld, cheap. But they have a little CCD camera, like on our phones, and take a picture of the barcode. They usually project a red glow, not a focused red line, which gives an aiming point and also lights up the barcode. The little computer inside the scanner then processes the image, finds the barcode in the image and reads it. This is reliable on paper and smartphones. Airlines use these to check us in!

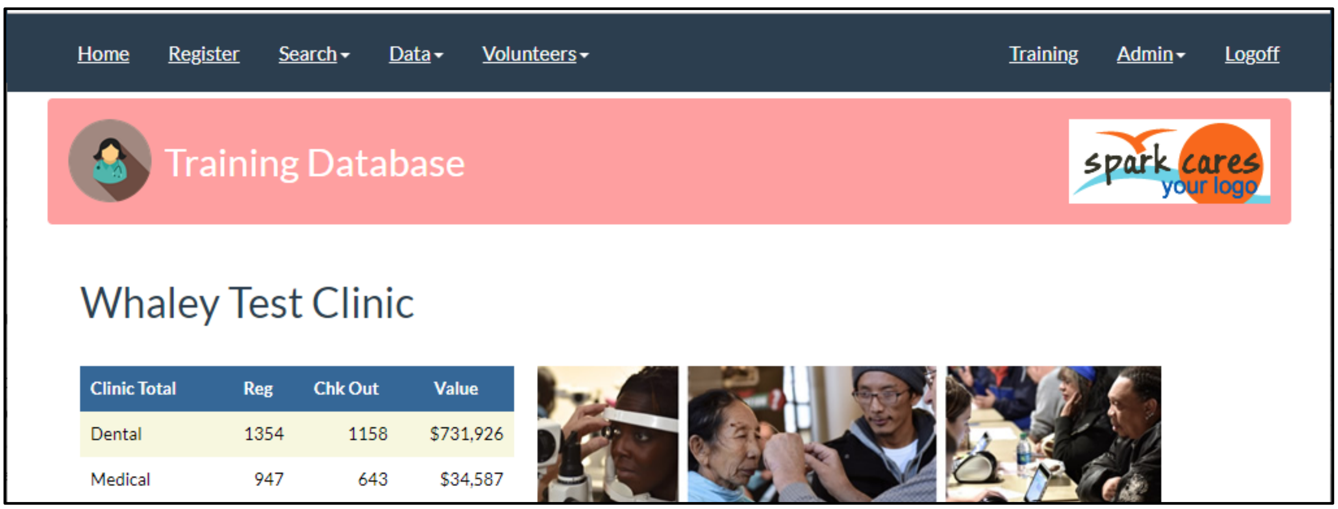
For you all currently using PaRIS and handheld barcode readers to speed up processing you may have a mixture of these two technologies. If you intend to read patient profile barcodes you will need to make sure you have the image type barcode scanners for that process.

Looking though the Amazon website at currently offered scanners, the vendors don't make this difference obvious. The laser models, down in the product description, do mention "Light source: visible laser" and things about scanning speed. For the Image (camera) scanners I see no mention of a camera, they just do not mention a laser. All of the image scanners I see also do 2D barcodes (QR Codes) – the software is probably not much more difficult so it is just added to the image scanners.

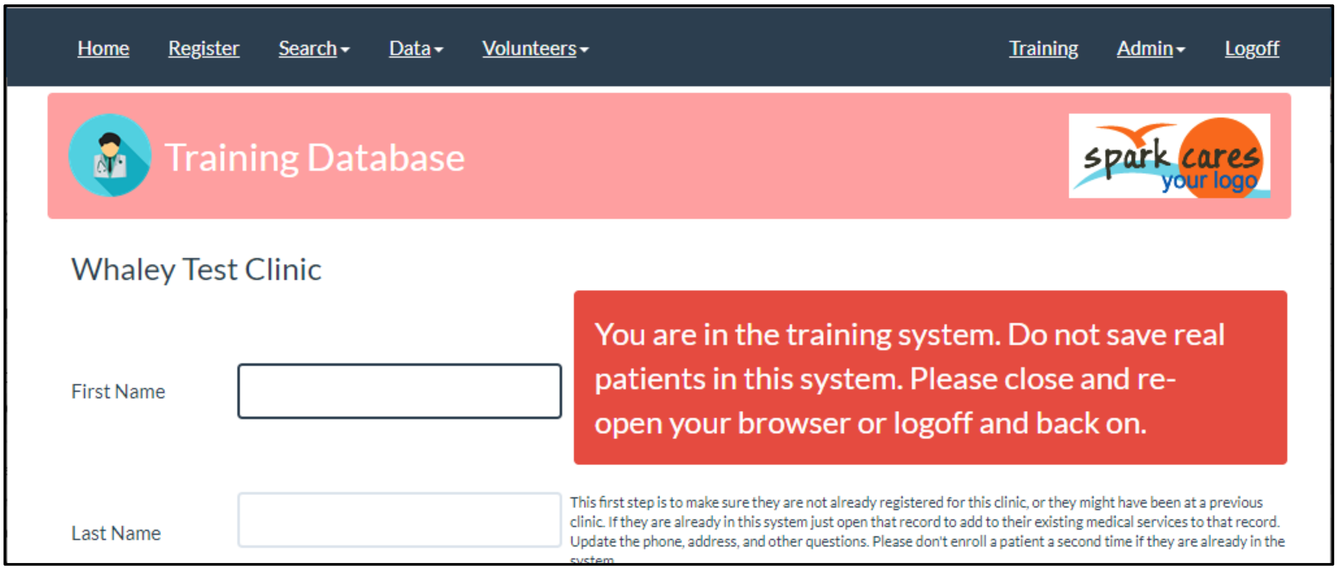
TRAINING VOLUNTEERS AT CLINICS ON PARIS

Each PaRIS system has a specified training clinic. This training clinic is where your volunteers can experiment and learn how the system works without interfering with real patient records.

To begin their training volunteers should click on the TRAINING menu option. Once they enter training mode the top section changes to pink to make it obvious. As you are running the training you are able to easily walk through the area and tell if they are learning on your training clinic. And once the real clinic registration begins it is also obvious which volunteers are still using the training system (and registering real patients incorrectly).



In addition, when they register patients there is a nice big obvious message to prevent errors.



WORKSTATION SETUP

WINDOWS SETUP ALL WORKSTATIONS

1. Turn off Windows auto-update. This happens at the worst time! For Windows 10 you are able to at least turn off Windows update when you are on WiFi.
2. For simplicity turn off the Windows password for the workstation. It is not needed. There is no patient data on these laptops. Having a workstation password and a PaRIS password is too confusing.
3. If you are using PaRIS at a permanent site you may need the workstation password.

BROWSER SETUP ALL WORKSTATIONS

1. We prefer the Google Chrome browser. Any browser with access to a PDF reader will work but Chrome has a nice built in PDF reader. Click here if Chrome is not installed. https://www.google.com/chrome/
   a. Any web browser compatible with IE 8 or above should work.
2. Set the home page to be your PaRIS website.
3. Put an icon on the desktop for PaRIS.
4. Turn off autofill in the browser. This tries to help you with addresses during registration and makes a real mess. It will try to copy over the last address entered!
5. Turn off saving passwords.
6. Set Chrome as the default web browser.

PATIENT REGISTRATION COMPUTERS

The registration computers print patient labels on Dymo printers and need a driver. The Dymo LaserWriter 400 drivers are much smaller than the LaserWriter 450 drivers. But just in case here are both of them.

LaserWriter 400 driver: Dymo_WIN_DLS77.EXE

http://paris.thesparkteam.org/Download/DymoLabelWriter/LabelWriter%20400/Dymo_WIN_DLS77.EXE

LasterWriter 450 driver: DLS8Setup.8.6.2.exe

http://paris.thesparkteam.org/Download/DymoLabelWriter/LabelWriter450/DLS8Setup.8.6.2.exe

For these computers be sure to set the DYMO printer as the default printer or you will need to select it every time. And set the default paper form to "30256 Shipping Label" on all the computers printing labels. If you are using some other label set that as the default form type.

> If you see the patient labels printing really small you do not have the default form set to "30256". It has defaulted to address label size - "30252". This is a common mistake. This needs to be set, on most Windows versions, in the printer setup in the Control Panel. Just setting it when you print does not stick.

Turn OFF Fit to Page (this resizes the barcode and can make it unreadable. This is an option when printing PDFs and not a standard Windows printer option. If set on it messes up the scaling on the barcodes and they can't be read.

If you are printing the smaller lab labels (DYMO form #30330) make sure the dymo Window's printer preferences are set to ZOOM 100%, landscape mode, turn off Fit to Page.

WINDOWS UPDATES

If it also a good idea to set OFF windows updates and automatic updates of any kind. At weekend popup clinics your computers may not be used for many months. When you power them up and are ready to start registering patients -- Windows Update kicks in! Suddenly, over a slow connection, you are waiting 2 or 3 hours until the update is completed.

If you are on a slow WiFi connection these will drain a hotspot's data plan as well as slow everything down. This is difficult if you are on Windows 10 as they try to prevent disabling updates. The following page shows you how to set off updates on a "metered connection" when on WiFi. You should definitely do this. Also try to set off Java, Adobe, and virus checker updates so they don't come up during a clinic.

https://gadgets.ndtv.com/laptops/features/how-to-disable-windows-10-automatic-updates-728049

DATA / SERVICE ENTRY COMPUTERS

These computers need a bar code scanner to quickly read the patient labels. Inexpensive USB barcode scanners do not need drivers so just plug them in. They can also quickly be moved to other computers as workloads shift.

It may seem like it is just as fast to type in patient and form numbers. But it really is much quicker, and must more reliable, to use a simple barcode scanner.

PAPER RECORDS SCANNING COMPUTERS

If you are using the ScanSnap IX500 paper scanners to store documents in the database install the software from the CD that came with the scanner or install this version if you don't have the CDs:

ScanSnap IX500: WinSSInstiX500WW1.exe

http://paris.thesparkteam.org/Download/ScanSnapScanner/WinSSInstiX500WW1.exe

Any scanner that turns paper into PDF files will work. Things are fastest if the software also includes an OCR scan of the documents as they are scanned but if it doesn't PaRIS will run the OCR scan on the server itself.

Follow this link to see the detailed instructions for setting up a ScanSnap IX500 scanner with PaRIS:

http://paris.thesparkteam.org/Download/SPARK%20IX500%20ScanSnap%20Usage%20Procedure.pdf

HELP VIDEOS

There are several help videos showing how to use the system located at:

http://paris.thesparkteam.org/Help.aspx

PROCESS EXAMPLES

These sections give examples of the typical usage of this system for common activities. There are many variations.

REGISTERING PATIENTS

The patient registration workstations are typically laptops setup at the patient entrance.

Workstation setup:

- Laptop or simple PC. Any processor speed supporting Windows 7 or greater, 1 GB of memory or greater.
- Internet access
- A Dymo label printer. Model 400 or 450 LabelWriter. USB connected. Drivers installed.
- Typically, you will be using Dymo compatible shipping labeled form 30256. So you probably need a roll at each workstation. Two other patient label form sizes are available.
- An internet browser is required. Google Chrome is preferred (slightly) but anything compatible with IE 11 or higher will work.
- PDF Reader such as the Adobe Acrobat Reader. Chrome has a built in PDF reader which makes things easier.
- No barcode scanner is needed.

Network Setup:

- Each workstation needs access to the Internet. This can be WiFi or ethernet cable.
- The workstations do not need access to each other. Your workstations at each clinic may be on separate networks if your clinic is spread out.
- Bandwidth requirements are very low.

Process:

1. Register the patient, answering the questions you have designed.
2. Print a patient label for each form being processed separately. Dental forms will be processed in dental, vision in the vision area, etc… Each will typically get their own patient label stuck to either the front or the back.

ENTERING PATIENT SERVICES

PCs are typically setup in the service areas where patients exit the area, not where they exit the building. In dental, for example, the service entry stations are setup there in dental where the patients exit. The "services" volunteers entering the data is better able to make sure the capture all the forms. They can also quickly scan the form to make sure it is complete and signed.

Workstation setup:

- Laptop or simple PC. Any processor speed supporting Windows 7 or greater, 1 GB of memory or greater.
- Internet access
- An internet browser is required. Google Chrome is preferred (slightly) but anything compatible with IE 11 or higher will work.
- Handheld barcode scanner. USB connected. See the section on selecting this scanner.
- OPTIONAL: A Dymo label printer. Model 400 or 450 LabelWriter. USB connected. Drivers installed. A medical professional may ask for a new form or additional form and being able to print these immediately is a plus. Typically, just one label printer is required.
    - PDF Reader such as the Adobe Acrobat Reader is needed on the exit PC with the Dymo printer. Chrome has a built in PDF reader which makes things easier.

Network Setup:

- Each workstation needs access to the Internet. This can be WiFi or ethernet cable.
- The workstations do not need access to each other. Your workstations at each clinic may be on separate networks if your clinic is spread out.
- Bandwidth requirements are very low.


PATIENT DENTAL RECORD
P126580 P140866
Whaley, Mike
Phone (333) 334 2233
222 Main Street
Olympia, WA 98888
** Emergency Contact
Kathy Whaley
(333) 444 5555
Lang: Spanish
1 PA xray
exo #15

Process:

1. One person will be monitoring the exiting patients to be sure to get all the forms. In dental it works better if the assistant brings over the patient with the form.
    a. Check to make sure it is complete and signed or walk back over to the dentist (or medical professional) to get it completed.
2. Give the form to the data entry person. They are on the page:
   Data → Scan Dental (or the service area)
   and they scan the patient label barcode with the handheld scanner. This takes them to the correct patient record.
3. Enter the services on the form and click [save].

USING DOCUMENT MANAGEMENT – SCANNING THE PAPER RECORDS

PCs for document scanning may be setup anywhere. The document scanning is so fast that some groups using PaRIS scan the documents immediately after entering the services. It depends on how busy you are and how many scanners you have.

Workstation setup:

- Laptop or simple PC with the same specifications as the services entry workstation.
- No barcode scanner is required.
- A paper scanner is required. Usually USB connected with drivers. See the section on selecting a paper scanner.

Network Setup:

- Each workstation needs access to the Internet. This can be WiFi or ethernet cable.
- The workstations do not need access to each other. Your workstations at each clinic may be on separate networks if your clinic is spread out.
- Bandwidth requirements are moderate. You will be uploading 300K to 800K documents, 10 to 50 at a time.

Process:

1. The paper documents are scanned one patient at a time. If you have xrays, prescriptions, doctors notes, and clinic medical records scan them all to one PDF file. At long as at least one page has a patient label on it then all the pages are automatically associated with the correct patient.
2. Typically, you can scan-scan-scan up to 50 patient records in a batch. Each patient's documents scanned to a separate PDF file. Note that this scanning process only creates PDF files on the local hard drive.
3. Periodically, you will upload the scanned PDF documents into PaRIS. See the document management section in this manual.
4. If the system finds a patient label the documents are automatically connected to the correct patient.

PROCESSING PATIENT X-RAYS

Many clinics, especially those doing dental work, take patient x-rays. X-ray equipment has a variety of software tools but most produce an image file that is then printed and shared with the dentist and patient. These can be scanned and upload into the system immediately.

Workstation setup:

- Same as for scanning paper records with the addition of a Dymo label printer.

Network Setup:

- Same as for scanning paper records

Process:

1. Once you print the x-ray print a patient label (any of the sizes) and put the label on the x-ray, front or back. Find an empty section of the x-ray image. This gives a clear easy patient identification for the dentist. In the chaos of a clinic this can help keep the records together.
2. Drop these in the paper scanner for a quick scan. You don't need to upload them immediately. Each scan only takes a few seconds.
3. Typically, you can scan-scan-scan up to 50 patient x-rays in a batch. If a patient has several x-rays only one needs a patient label. Scan all x-rays for a single patient into a single PDF file
    a. Note that this scanning process only creates PDF files on the local hard drive.
4. Periodically, you will upload the scanned PDF x-ray documents into PaRIS. See the document management section in this manual.
    a. You may continue x-raying patients while the PDF file upload is taking place.
5. If the system finds a patient label the x-rays are automatically connected to the correct patient.

SAVING MISCELLANIOUS PATIENT RECORDS

You may have some doctors writing outside prescriptions or sending patients home with other notes. These can be scanned at a workstation quickly before the patient leaves with the document. Scanning paper only takes a few seconds.

The document will need at least the patient's name on it so the volunteers can manually link it to the correct patient.

Alternately if a volunteer in the area has the authority, they can use the Spark Mobile Web App to take a picture of the document and upload directly into the patient's record.

THE PARIS SYSTEM AND HIPAA

The PaRIS system does not support insurance company billing or patient billing. Therefore, PaRIS users are rarely HIPAA Covered Entities. However, many groups may want to claim they are HIPAA compliant and follow HIPAA rules for grants and/or to help their patients feel comfortable with the management of their medical records.

Most of the HIPAA compliance rules will fall on the group licensing PaRIS for use. The licensing group will need to control who has access to the system, and from where, their permissions, and then control any paper generated. Controling accounts volunteers use at your clinics is probably your biggest challenge with HIPAA compliance.

When documenting your systems security setup be aware of the following:

1. Your patient data is in a standalone database and not mixed with any other group using PaRIS.
2. Your PaRIS patient data is in an encrypted database meaning the data is encrypted “at rest”.
3. The network traffic to and from your PaRIS website is encrypted. This includes logon traffic.
4. Uploaded patient paper records are individually encrypted and not available on the Internet. They can only be accessed through your PaRIS system.
5. Each group controls their own user accounts and passwords.
6. Every access to each patient’s online medical record is logged. This includes logging the display of every uploaded paper form each time it is viewed.
    a. This log is viewable at the bottom of each patient’s online medical record.