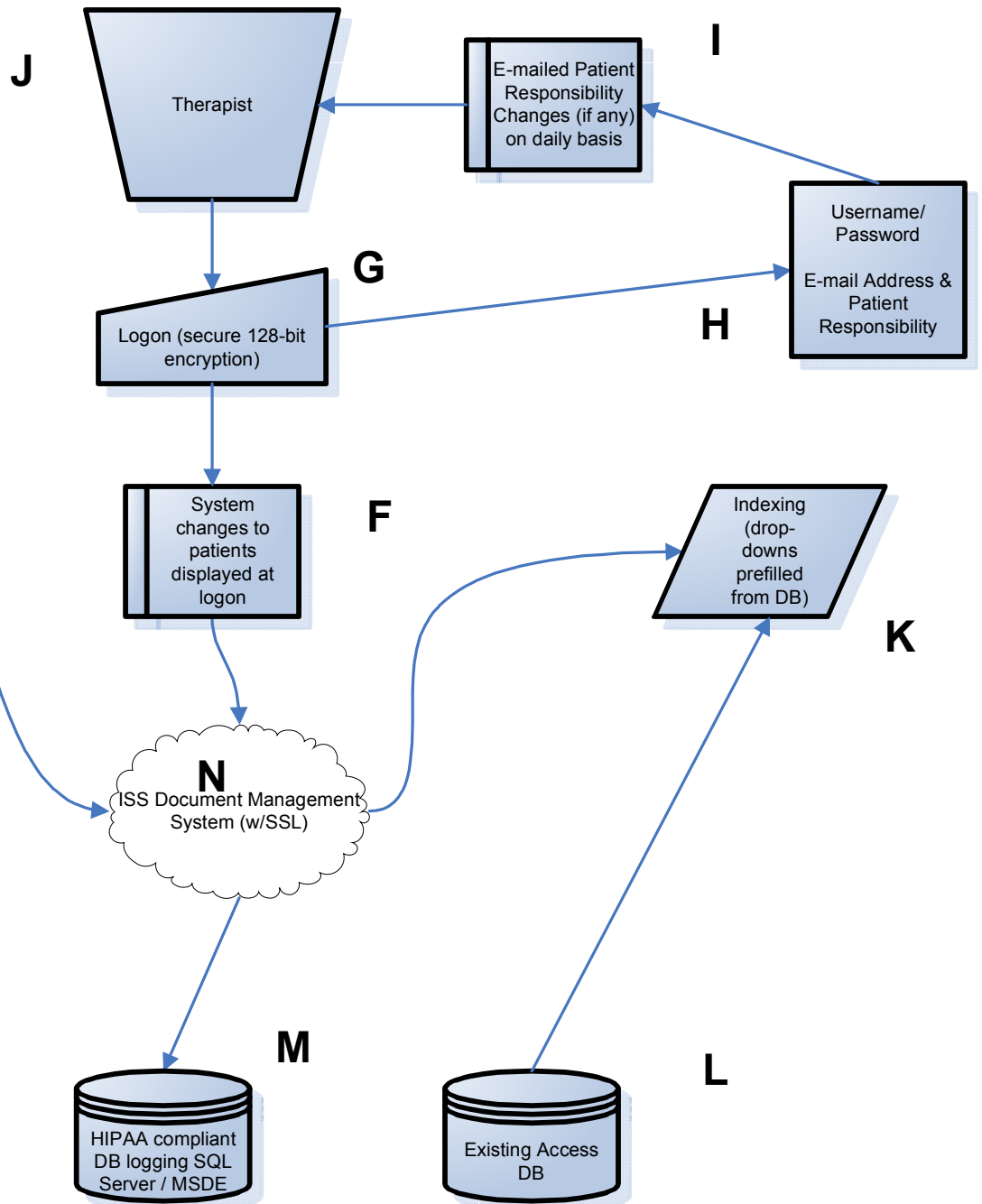


# ISS DMS

- ISSBC or ISS's Barcode Cover Sheet creator will allow user to create barcode cover sheets with Index information to attach to documents for scanning
- File Capture will poll a hot-folder which is the target of MFP scans, extract the barcoded-info, and send it to the ISS DMS database
- A therapist can then securely logon to the DMS system to view their patients' records and modify any meta-data associated with that document
- Meta-data field drop-downs are pre-filled from existing SQL Server database



# ISS Clinical Document Management System Overview

The ISS CDMS is a self-contained Document Management System built upon industry standard technology. CDMS is web-based and therefore offers flexibility of usage from virtually anywhere.

Hardware Platform: CDMS uses industry leader Hewlett Packard's server (scaled to needs) with fault-tolerant RAID and tape backup integrated into the solution.

Software Platform: Microsoft Windows Server 2003 with IIS, and MSDE or SQL Server Database scaled according to needs.

## Document Scanning and Processing:

### A.

Prepare Document Separator Sheets using ISS Bar Code Utility "ISSBC":

- Index values are entered in a user-friendly application
- Print Bar-Coded Separator Sheet
- Optionally write to Document Tracking and Audit Database (**M**)

### ISS BC Screen Shot:

The screenshot shows the ISS BC application interface. It features a 'File To Import' field with the text 'TheFileName'. Below this is a 'Directory' tree view showing a folder structure under 'Customer\_Documents'. The tree includes folders like 'home', 'adminNDA', 'allison', 'byram', 'demo', 'Employee\_Health', 'gm', 'hr\_files', 'issA4PDemo', 'James', 'JeCL', 'Medical\_Staff', 'pc', 'rglSS', 'Student\_Records', 'termination', and 'SALESMAN'. The 'James' folder is expanded, and 'GSTest2' is selected. On the right, there are several input fields organized into sections: 'I ext' with fields for Account\_Number, Client\_Name, Doc\_Type, First\_Name, ID\_Number, Last\_Name, Sections, and Serial\_Number; 'Numbers' with fields for AccountNumber, Number, and PrescriptionNumber; and 'Dates' with fields for Date and InvoiceDate.

### B.

Prepare Documents for Scanning:

- Place a Separator Sheet as the first item in each batch. This allows auto separation of batches and will apply the index values to each item in the batch.

### C.

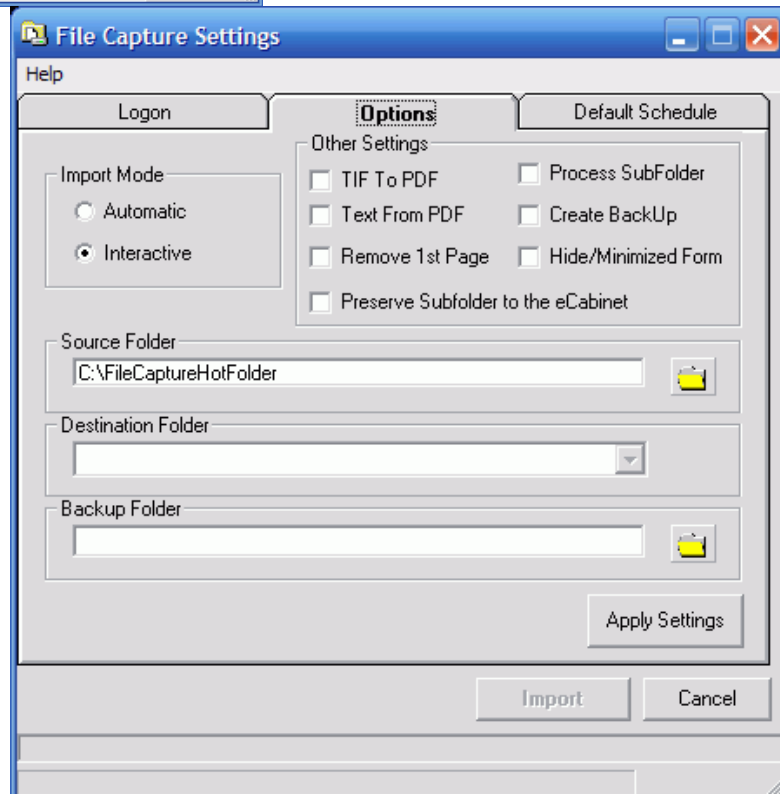
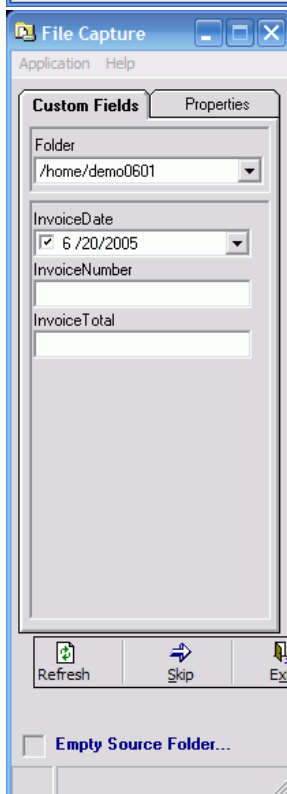
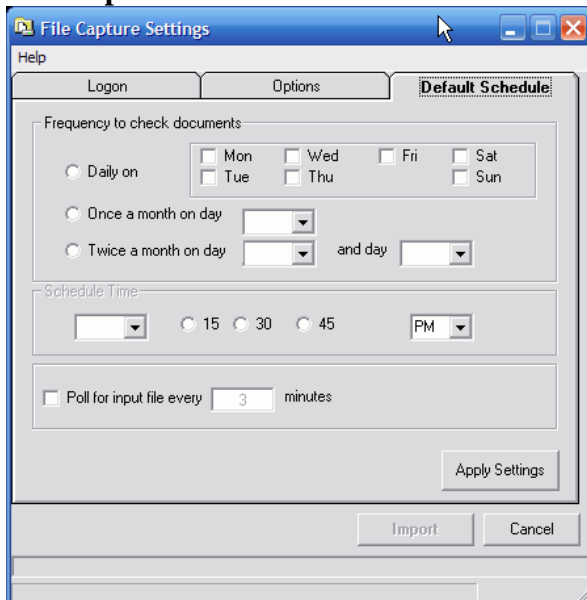
Scan the batches on a scanner or MFP

### D.

Send Scanned Images and Index Info to Database:

- MFP sends output scanned images to a network folder
- ISS File Capture polls folder
  - Converts images to searchable PDF (optional)
  - Sends images to the CDMS Database
  - Optionally writes to Document Tracking and Audit Database (**M**) upon insert into CDMS Database

### File Capture Screen Shots:



## **E.**

CDMS SQL or MSDE Database assimilates images + index data & stores in CDMS (**N**)

### **Therapist Interaction with CDMS:**

#### **I. / J.**

Therapist receives an e-mail notification, generated by one of the following conditions:

- Therapist has a new patient
- Notes have been scanned to an existing patient's folder

Therapist clicks on the link in the e-Mail:

- Is brought to the log-on screen of CDMS via an HTTPS / SSL connection (**G.**)
- Views the portal to the system
  - Image search fields
  - Patient lookup
  - Changed documents since last log-in

### **Therapist Log-in Info, Patient Updates, and Values in Restricted Choice Lists:**

Managed via daily extracts from existing system (**L.**=> **K.** and **L.**=> **H.**)

# CDMS System Screen Shots of a recently Deployed System:

## Log-in Screen:

Login

Username:

Password:

Login

## Query / Search Screen:

Welcome back admin Date: 6/2/2006 4:35:20 PM

Search

### Document Information

**Filename:**

**Document Type:** [Select Type]

**Review Status:** [Select Status]

**Folder:** [Select Folder]

Include Subfolders

### Personal Information

**Client ID:** =  =

**Site ID:**

**Firstname:**

**Lastname:**

**SSN:**  (xxx-xx-xxxx)

**Date of Birth:** =  =  (yyyy-mm-dd)

**Race:** [Select Race]

**Ethnicity:** [Select Ethnicity]

**Gender:** [Select Gender]

**Marital Status:** [Select Status]

**No. of Children:** =  [Select No. Of Ch] =  [Select No. Of Ch]

**Age of Children :** =  [Select Age] =  [Select Age]

### Medical Information

**Medicaid No:**

**Medicaid Status:** [Select Status]

**Date of Admission** =  =  (yyyy-mm-dd)

**Admission Status:** [Select Status]

**Insurance ID:**

**Insurance Company:**

**Axis Diagnostic Code:** [Select Code]

**Progress Note:** [Select Progress Note]

### Drug of Abuse:

**Primary:** [Select Drug]


**Secondary:** [Select Drug]

**Tertiary:** [Select Drug]

### Toxicology Report Results

Run Search

## Add User:

 **User Information**

Firstname:

Middlename:



Lastname:

Username:

Password:





Verify:

Description:

 Save  Cancel

## User Manager:


**User Manager** Total Users: 1

	<u>Username</u>	<u>Password</u>	<u>Description</u>	<u>Date Created</u>
<a href="#">Edit</a>	admin	admin	built in user	6/1/2006 1:03:00 PM

1

## Add Group:



 **Group Information**

Group Name:



Description:



[Members](#) [Permissions](#)

All Users	Current Users
	ADMIN

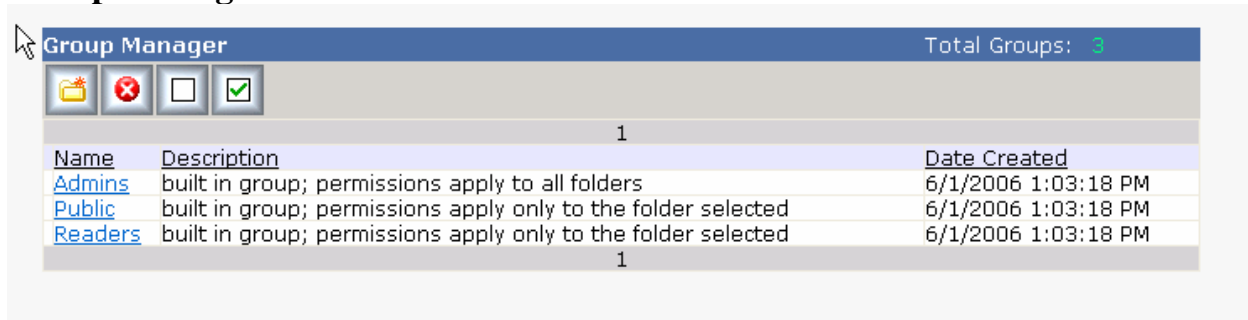
 

All Groups	Current Groups
Admins Readers	PUBLIC

 Save  Cancel

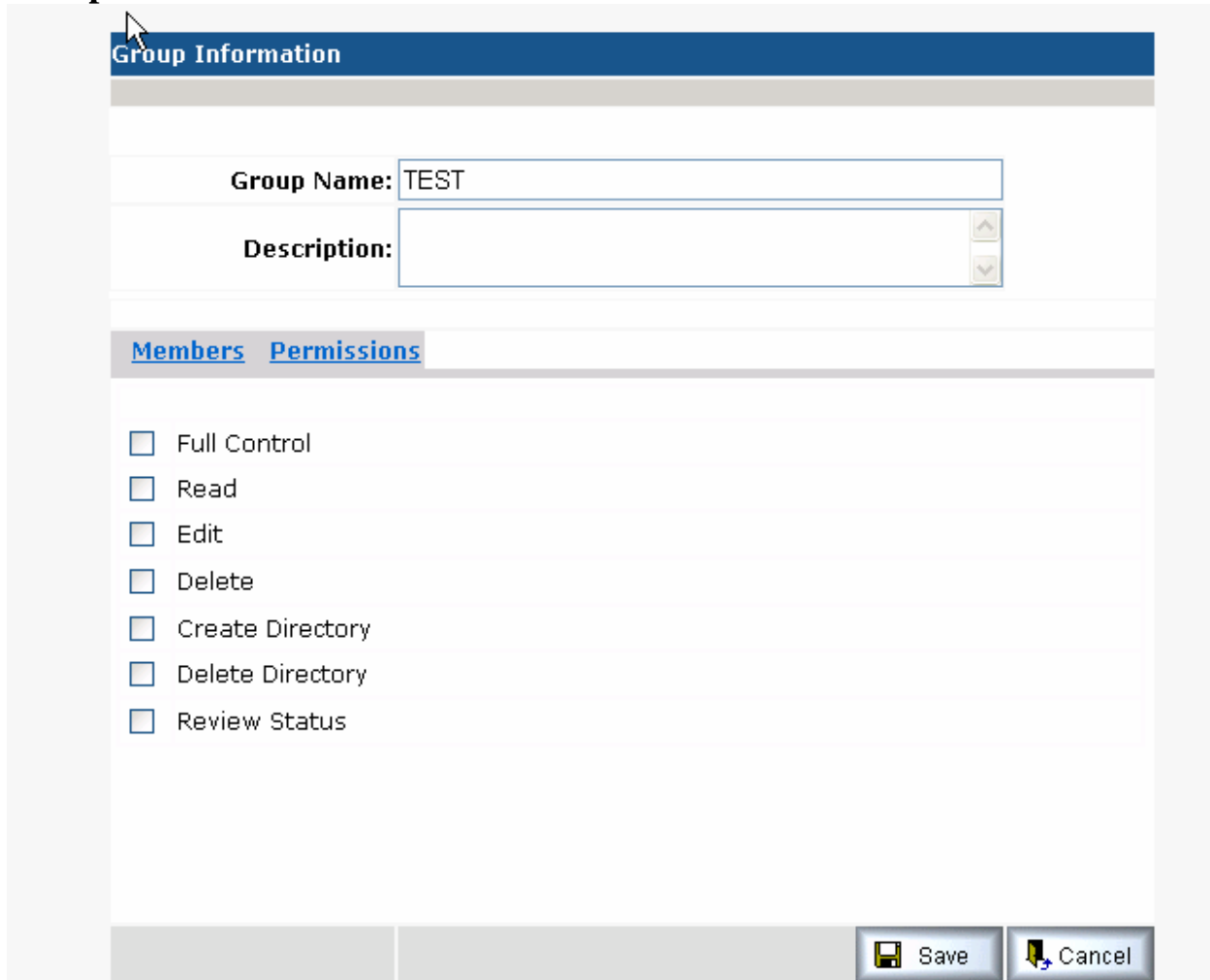
## Group Manager:



The Group Manager window displays a list of groups. The title bar shows "Group Manager" and "Total Groups: 3". Below the title bar are four icons: a folder, a red X, an empty square, and a green checkmark. The main area contains a table with three columns: Name, Description, and Date Created. The table lists three groups: Admins, Public, and Readers. A status bar at the bottom shows the number "1".

Name	Description	Date Created
<a href="#">Admins</a>	built in group; permissions apply to all folders	6/1/2006 1:03:18 PM
<a href="#">Public</a>	built in group; permissions apply only to the folder selected	6/1/2006 1:03:18 PM
<a href="#">Readers</a>	built in group; permissions apply only to the folder selected	6/1/2006 1:03:18 PM

## Group Permissions:



The Group Permissions window is divided into two main sections. The top section, titled "Group Information", contains a "Group Name" field with the value "TEST" and a "Description" field. Below this is a tabbed interface with "Members" and "Permissions" tabs. The "Permissions" tab is active, showing a list of permissions with checkboxes: Full Control, Read, Edit, Delete, Create Directory, Delete Directory, and Review Status. At the bottom right, there are "Save" and "Cancel" buttons.

**Group Information**

Group Name: TEST

Description:

**Members** **Permissions**

- Full Control
- Read
- Edit
- Delete
- Create Directory
- Delete Directory
- Review Status

Save Cancel

## Add Folder:

**Folder Properties**

**Folder Name:**

**Location:**

**Owner Type:**  Users  Groups

**Owner:**

**Viewer Type:**  Users  Groups

**Viewer:**

## Add Index Value:

Admission Status		Total Status: 2
1		
	Admission Status	Description
<input type="checkbox"/>	<a href="#">Edit</a> Primary	
<input type="checkbox"/>	<a href="#">Edit</a> Significant Other	
1		

## Folders:

Folders				Total Folders: 1
1				
	Filename	Capture Date	Owner	Viewer
	<a href="#">New</a>		admins	1
1				

## Edit Index Value:

Admission Status		Total Status: 2
1		
	Admission Status	Description
<input type="checkbox"/>	<a href="#">Update</a> <a href="#">Cancel</a> Primary	
<input type="checkbox"/>	<a href="#">Edit</a> Significant Other	
1		

## Sample Indexes:

Index Manager		Total Indexes: 9
1		
Index Name		
<a href="#">Edit</a>	Admission Status	
<a href="#">Edit</a>	Axis Diagnostic Code	
<a href="#">Edit</a>	Document Type	
<a href="#">Edit</a>	Drug Of Abuse	
<a href="#">Edit</a>	Ethnicity	
<a href="#">Edit</a>	Gender	
<a href="#">Edit</a>	Marital Status	
<a href="#">Edit</a>	Medicaid Status	
<a href="#">Edit</a>	Race	
1		

## Event Log:

Activity Report		Total Records: 2	
<input checked="" type="radio"/> General Activity <input type="radio"/> Index Modification		View: Today	
1			
Activity	Login	Details	Event Date
ADD GROUP	admin	Group TEST added successfully	6/2/2006 4:40:00 PM
SIGN ON	admin		6/2/2006 4:35:00 PM
1			

## Document Properties:

Document Information	
<b>Filename:</b>	confm.pdf
<b>Document Type:</b>	Type3 <input type="button" value="v"/>
<b>Review Status:</b>	[Select Status] <input type="button" value="v"/>
<b>Folder:</b>	Home\New <input type="button" value="v"/>
Personal Information	
<b>Client ID:</b>	12345
<b>Site ID:</b>	
<b>Firstname:</b>	Hinden
<b>Lastname:</b>	Barredo
<b>SSN:</b>	123-45-1111 (xxx-xx-xxxx)
<b>Date of Birth:</b>	(yyyy-mm-dd)
<b>Race:</b>	[Select Race] <input type="button" value="v"/>
<b>Ethnicity:</b>	[Select Ethnicity] <input type="button" value="v"/>
<b>Gender:</b>	[Select Gender] <input type="button" value="v"/>
<b>Marital Status:</b>	[Select Status] <input type="button" value="v"/>
<b>Number of Children:</b>	[Select No. Of Children] <input type="button" value="v"/>
<b>Age of Child 1:</b>	[Select Age] <input type="button" value="v"/>

