

How to Scan a Chart

Initial Scan sequence

(CLINICAL) LEFT SIDE OF CHART

1. Divide the left side (Clinical) of the chart into 4 sections
 - a. Section 1: Most Recent Gold Sheet
 - b. Section 2: Most Recent Year's Documents
 - c. Section 3: Second Most Recent Year's Documents
 - d. Section 4: Everything Else
 - i. **File may limit size between 25-40 pages depending on complexity of pages**
2. Remove all staples and tape papers that are smaller than standard size onto a blank page
3. Scan your 4 sections in separately.
4. After each scan, label them as follows
 - a. Demographics 2014 (or whatever the most recent gold sheet date is)
 - b. Clinical 2017 (or whatever is the most recent year)
 - c. Clinical 2016 (or whatever is the 2nd most recent year)
 - d. Clinical 1999-2015 (or whatever the range of years is)
 - i. All File Types: Clinical

(ADMINISTRATIVE) RIGHT SIDE OF CHART

5. Divide the right side (Administrative) of the chart into 4 sections
 - a. Section 1: Pink Sheets (nothing else stapled to them)
 - b. Section 2: Most Recent Year's Documents & the Ledger card
 - c. Section 3: Second Most Recent Year's Documents
 - d. Section 4: Everything Else
 - i. **File may limit size between 25-40 pages depending on complexity of pages**
6. Remove all staples and tape papers that are smaller than standard size onto a blank page
7. Scan your 4 sections in separately.
8. After each scan, label them as follows
 - a. Pink Sheet 2012-2017 (or whatever the most recent pink sheet date is)
 - b. Admin 2017 (or whatever is the most recent year)
 - c. Admin 2016 (or whatever is the 2nd most recent year)
 - d. Admin 1999-2015 (or whatever the range of years is)
 - i. All File Types: Administrative

LAST STEP

1. **Add pop up alert informing the office this chart has been scanned**
 - a. **Go to Patient Screen > Additional Info Tab > Click "Add Alert"**
 - b. **Text: "(date): SCANNED BY TH" ← Please use your initials**
 - c. **Select "Patient Page"**
 - d. **Click "Create Alert"**