

MedInformatix



PDF Documents

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Overview

One of the new features available to users in the Medinformatix V7 software is the incorporation of PDF documents. Now, PDF Forms can be created for clients and setup in the decision tree so that they can be accessed by users and saved into patients' charts and/or printed off for completion. Additionally, users are also able to scan documents into patients' charts as PDF documents.

The following sections will discuss in detail how to create PDF Forms for clients, how to setup PDF Forms in the decision tree, the features encompassed in PDF Scanning, and how to setup PDF Scanning for clients.

Section 1: PDF Forms

Installation of Electronic Signature Pads

The following instructions are included with the accompanying installation CD that clients receive when they purchase an Electronic Signature Pad.

When installing the pad, clients must install all applicable MS-Word plug-ins. Furthermore, clients must also install the correct Adobe Acrobat plug-ins that corresponds to the version of Adobe Acrobat that they are utilizing.

Instructions

Setting The Signature Pad As The Default Signing Method

1. Locate and click on the **Adobe Acrobat** software so that it launches.
2. Click on the **Edit** option in the **upper toolbar**.
3. Click on the **Preference** option in the **Edit dropdown** menu.
4. Click on the **Security** option from the list within the **Preferences** window.
5. Click on the **Advanced Preferences** option in the **Security** screen.
6. Click on the **Creation** tab in the **Advanced Preferences** screen.
7. Select the **installed signature pad** from the **Default Method to Use when Signing and Encrypting Documents** dropdown.
8. Click on the **OK** button in the **Advanced Preferences** screen.
9. Click on the **OK** button again to save the option entered into the software

Creating Editable PDF Forms

Note:

For ease of entry and formatting, it is preferred that the client provides their forms in the Microsoft Word format. This is because the Adobe software will automatically read the form to determine what fields are present in the document what creating them from existing electronic files.

There are 3 different ways in which users can create editable PDF Forms for utilization in MedInformatix. These are:

- From an existing document in an electronic format, such as PDF, Microsoft Word, or Microsoft Excel.
- From a paper form that is scanned into the system.
- From scratch or from a template.

Instructions

Creating A PDF Form From An Existing Electronic Document

1. Locate and click on the **Adobe Acrobat** software so that it launches.
2. Click on the **Forms** button, which is located in the **upper** toolbar.
3. Click on the **Start Form Wizard** option from the **Forms** dropdown menu, which will take users through all of the steps of creating a PDF form.
4. Select the **Create Form from Existing Electronic Document** option in the **Create or Edit Forms** screen.
5. Click on the **Next** button.
6. Click on the **Browse** button in the **Create or Edit Form** screen, which will launch a screen that users can utilize to locate the existing electronic document that will be used for the new PDF form.
7. Click on the **Next** button, which will generate the new PDF form.

Activity 1-1

Creating A PDF Form

Activity Time:

5 minutes

Before You Begin:

- Users will want to have a sample form in an electronic format that they would like to convert into an interactive PDF Form.
- Additionally, users will also require access to the Adobe Acrobat software for this activity.

Scenario:

You have created a new MS Word form that you would like the users at your Front Desk to utilize. The form will be completed when patients check-in for their appointments. Because this new form has several fields that the Front Desk users will be completing with the patients, you have decided to convert the form into an interactive PDF Form.

What You Do	How You Do It
1. Open the Adobe Acrobat software.	a. Locate and click on the Adobe Acrobat software so that it launches.
2. Open the created MS Word document in the Adobe Acrobat software.	a. Click on the Forms button, which is located in the upper toolbar. b. Click on the Start Form Wizard option from the Forms dropdown menu, which will take users through all of the steps of creating a PDF form. c. Select the Create Form from Existing Electronic Document option in the Create or Edit Forms screen. d. Click on the Next button. e. Click on the Browse button in the Create or Edit Form screen, which will launch a screen that users can utilize to locate the existing electronic document that will be used for the new PDF form. f. Click on the Next button, which will generate the new PDF form.

Fields on PDF Forms

Notes:

The Digital Signature Field is currently not supported in MedInformatix. However, it is recommended that users setup Signature Fields on all PDF Forms for future use as this is a feature that will be available in MedInformatix in the future.

When creating PDF Forms, users have a variety of entry fields that they can apply to a form. These entry fields are the regions within the form that clients will utilize to input information into the form. There are currently 5 different field types that are supported within MedInformatix that can be applied to created PDF Forms:

Field Type:	Explanation:
Text Field	Allows the user to type text, such as name, address, or phone number, into the field.
Check Box	Currently utilized for 'Yes/No' selection on individual items. If the form contains multiple check boxes, the user can select as many or few of these as needed.
List Box	Displays a list of choices in which the user can select multiple options.
Combo Box	Displays a list of choices in which the user can select only one option. This appears as a dropdown, but also allows the user to free type a response.
Buttons	Initiates a change on the user's computer, such as opening a file, playing a sound, or submitting data to a web server. These buttons can be customized with images, text, and visual changes triggered by mouse actions.
Radio Button	Presents a group of choices from which the user can select only one item. All radio buttons with the same name work together as a group.
Barcode	Encodes the information inputted from selected fields and display it as a visual pattern that can be interpreted by decoding software or hardware.
Digital Signature	Enables users to electronically sign a PDF document with a digital signature or electronic signature pad.

Instructions

To Add A Field To A PDF Form

1. Open the created PDF Form in the **Adobe** software.
2. Right click on the document so that a **dropdown menu** appears.
3. Click on the **type of field** that is required on the form.
4. Click on the added field and **drag** it to the correct position on the form.
5. Resize the field as needed.
6. Click on the **Save** option in the upper toolbar so that the changes made to the form are saved.

To Edit A Current Field On A PDF Form

1. Open the created PDF Form in the **Adobe** software.
2. Double click on the **field** that requires updating.
3. Click on the **type of field** that the field should be.
4. Click on the **Save** option in the upper toolbar so that the changes made to the form are saved.

Activity 1-2

Updating The Fields On A Created PDF Form

Activity Time:

10 - 15 minutes

Before You Begin:

- Users will need to complete Activity 1-1 in order to complete this activity.
- Additionally, users will also require access to the Adobe Acrobat software for this activity.

Scenario:

You have converted a new form that you originally created in MS Word into a PDF document. Since this form will be completed with the information supplied by your patients, it will need to contain several fields so that the Front Desk users can input the information provided to them. When the form was converted to a PDF document, the Adobe Acrobat software automatically identified several data entry fields on the form. However, some of the fields that were identified do not have the correct entry method applied to them. Furthermore, there are some additional fields that need to be added to the form.

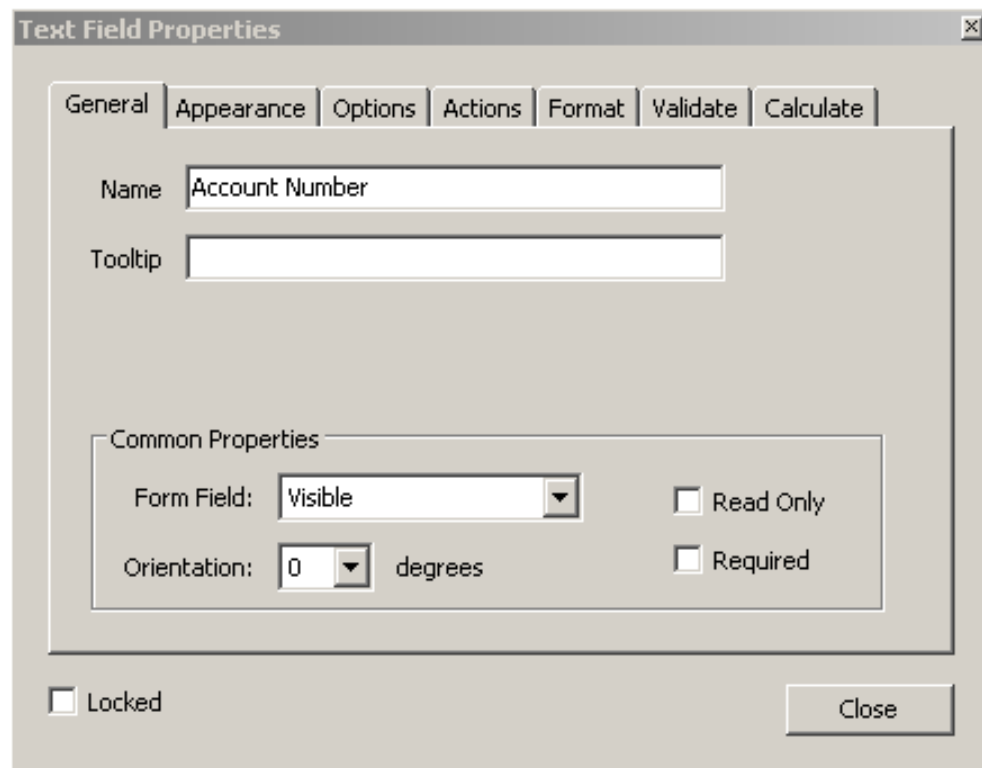
What You Do	How You Do It
1. Add a new data entry field onto the PDF Form.	<ol style="list-style-type: none">a. Right click on the document so that a dropdown menu appears.b. Click on the type of field that is required on the form.c. Click on the added field and drag it to the correct position on the form.d. Resize the field as needed.e. Click on the Save option in the upper toolbar so that the changes made to the form are saved.
2. Edit an existing data entry field on the PDF Form.	<ol style="list-style-type: none">a. Double click on the field that requires updating.b. Click on the type of field that the field should be.c. Click on the Save option in the upper toolbar so that the changes made to the form are saved.

Properties For Entry Fields

Users are able to set a variety of properties for entry fields on the PDF Forms depending on the form field type being utilized. The properties for each type of entry field are designated by users within the **Field Properties** screen in the Adobe software.

Each entry field type will display a **General** tab and an **Actions** tab in the Field Properties screen. Additional tabs, such as the **Appearance** tab, will only appear for specific entry fields. However, the **Options** tab will appear for a majority of the entry field types, but the options available within the screen are unique to each type of entry field.

Below is a breakdown of the different option available to users in the Field Properties screen.



The screenshot shows the 'Text Field Properties' dialog box with the following elements:

- Tabbed interface with 'General' selected. Other tabs include Appearance, Options, Actions, Format, Validate, and Calculate.
- 'Name' field: Account Number
- 'Tooltip' field: (empty)
- 'Common Properties' section:
 - 'Form Field': Visible (dropdown menu)
 - 'Orientation': 0 (dropdown menu) degrees
 - 'Read Only':
 - 'Required':
- 'Locked':
- 'Close' button

Field Properties screen

Properties For Entry Fields, *continued*

General Tab	
Fields:	Explanation of Fields:
Name	Specifies the unique name of the selected form field.
Orientation	Rotates the form field by 0, 90, 180, or 270 Degrees.
Read Only	This prevents a user from being able to change the form field content.
Required	This forces the user to fill in the selected form field.

Appearance Tab	
Fields:	Explanation of Fields:
Fill Color	Users can select a color for the background behind the field.
Font Size	Users can set the size of the user-entered text or of the selection marker for radio buttons and check boxes.

Options Tab	
Fields:	Explanation of Fields:
Check Box	Specifies the shape of the marker that appears inside the check box or radio button when the user selects it. The size of the marker inside the check box is determined by the size of the font you specify in the Appearance tab.
Radio Button	Specifies the shape of the marker that appears inside the check box or radio button when the user selects it. The size of the marker inside the check box is determined by the size of the font you specify in the Appearance tab.
Alignment	Aligns the text left, right, or center within the field.
Multi-line	Allows more than a single-line entry in the text field.

Tabbing Order In PDF Forms

After creating a PDF Form, users can change the tabbing order of the entry fields while in form editing mode. Users can order the tabs by the document structure, row, or column. Users can also manually choose the tabbing order by dragging and dropping fields in the Fields panel.

The below steps explain in detail how to alter the tabbing order on a PDF Form.

Instructions

To Change The Tabbing Order On A PDF Forms

1. Open the created PDF Form in the **Adobe** software.
2. Select the **Sort** option in the **Fields Navigation** panel, which is located on the left side of the screen.
3. Select the **Tab Order** option in the dropdown menu.
4. Select one of the possible **Tab Order** options so that it is applied to the PDF Form.

Previewing The Final PDF Form

Users can preview how the information entered into each field on a PDF Form will appear by clicking on the **Preview** button, which is located in the upper toolbar of the **Form Editing** screen in the Adobe software.

If users need to make any additional changes while they are previewing the PDF Form, they would click on the **Edit Layout** button to return to the **Form Editing** screen.

Activity 1-3

Updating The Tabbing Order On A Created PDF Form

Activity Time:

5 minutes

Before You Begin:

- Users will need to complete Activity 1-1 and Activity 1-2 in order to complete this activity.
- Additionally, users will also require access to the Adobe Acrobat software for this activity.

Scenario:

You have successfully converted the new form that you created in MS Word into a PDF document. Furthermore, you have added the necessary data entry fields to the new PDF document so that the users at your Front Desk are able to input in information provided to them by your patients. You have decided that it would be a good idea to preview the PDF form prior to publishing it to ensure that it is functioning as you had envisioned and to make sure that it is user-friendly.

What You Do	How You Do It
1. Preview the PDF document to test the tabbing order on it.	<ol style="list-style-type: none">a. Click on the Preview button, which is located in the upper toolbar of the Form Editing screen in the Adobe software.b. If additional changes need to be made, users should click on the Edit Layout button to return to the Form Editing screen.
2. Change the tabbing order of the data entry fields on the form so that users are able to move from the left side of the screen to the right side, as well as from the top of the screen towards the bottom.	<ol style="list-style-type: none">a. Select the Sort option in the Fields Navigation panel, which is located on the left side of the screen.b. Select the Tab Order option in the dropdown menu.c. Select one of the possible Tab Order options so that it is applied to the PDF Form.

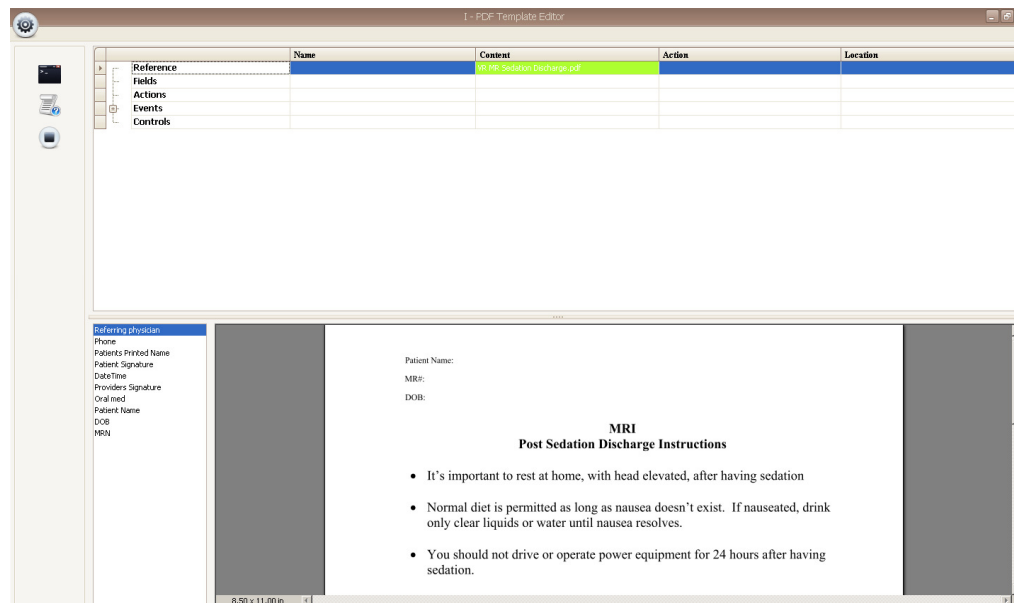
Creating Corresponding XML Files

Notes:

When downloading the MI PDF Template Generator, users must place the executable in the **MEDINFO.CLIENT** folder. Also, users should verify that the **MIPFVW.DLL** and **MIPFVWAX.DLL** files are installed and registered correctly

Corresponding XML files are created and used in conjunction with the PDF Forms within Medinformatix. These files can be used to pull in patient and/or appointment specific information from the SQL database utilized by the MedInformatix software.

Users will need to download and install the MI PDF Template Generator, which is used to create the XML File. After installing this, users will need to license the program through MedInformatix. Additionally, when users open the program for the first time, they will be prompted to enter the Private Key for the program.



MI PDF Template Generator screen

Instructions

Creating The XML File

1. Locate and open the **MI PDF Template Generator**.
2. Drag and drop the **current PDF file** into the program, which will generate a pop-up screen.
3. Click the **Yes** button on the pop-up screen, which will display the PDF document at the bottom of the **MI PDF Generator** screen.

Activity 1-4

Creating The XML File For A Created PDF Form

Activity Time:

5 minutes

Before You Begin:

- Users will need to complete Activity 1-1, Activity 1-2, and Activity 1-3 in order to complete this activity.
- Additionally, users will also require access to the XML Creation software for this activity.

Scenario:

After converting the new form that you created for your Front Desk users into a PDF Form, you need to create the XML file that corresponds with it so that the form can be completed within the Medinformatix software.

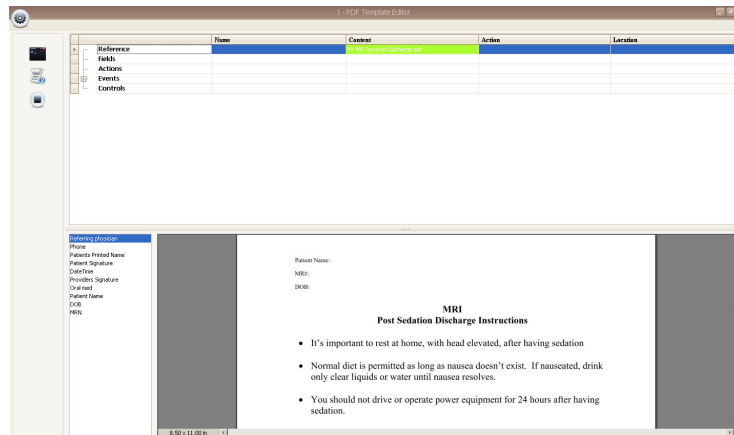
What You Do	How You Do It
1. Create the XML file for the converted PDF Form.	<ol style="list-style-type: none">Locate and open the MI PDF Template Generator.Drag and drop the current PDF file into the program, which will generate a pop-up screen.Click the Yes button on the pop-up screen, which will display the PDF document at the bottom of the MI PDF Generator screen.

MI PDF Generator Screen




The MI PDF Generator screen is separated into two different portions. The bottom left side of the MI PDF Generator screen lists all of the fields that have previously been defined in the PDF document during the PDF Form creation process. The top of the screen allows you to set up and control what actions occur within the document in MedInformatix.

Additionally, PDF Forms can be pre-populated with SQL data through the use of global variables and queries. Built-in commands can also be added to the PDF document so that users can save, clear, and/or exit the document. Likewise, buttons can be added to PDF Forms to control different actions that the user should be able to perform within the document.

The below is a description of the different tools that can be utilized while working in the MI PDF Generator screen.



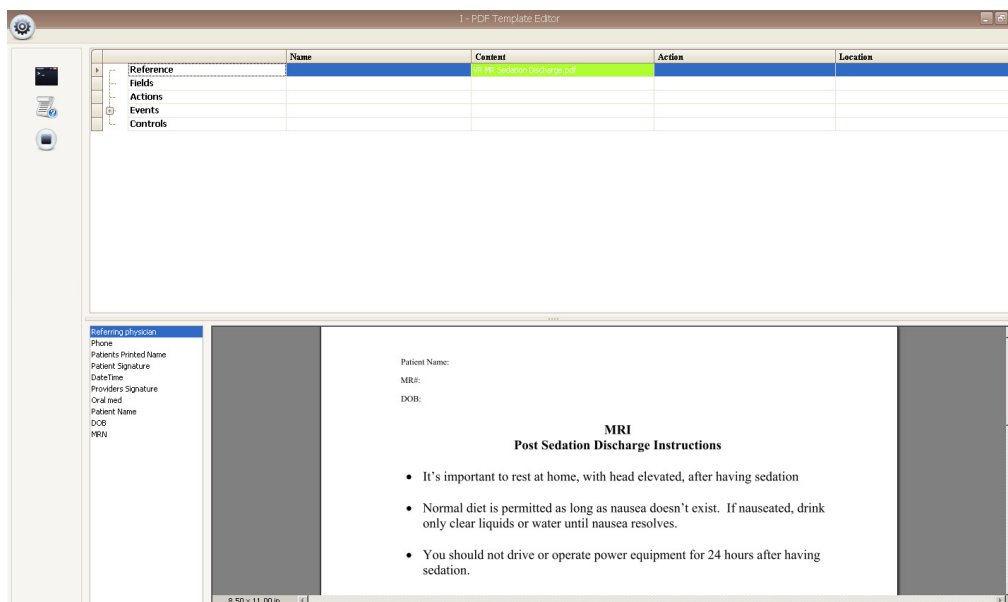
MI PDF Template Generator screen

Feature	Description
 Command	This contains the preset commands used to Save, Clear, and Exit the form.
 Query	This is used to add SQL queries to the document.
 Button	This is used to create buttons that execute different functions within the document.

Defining PDF Form Fields in the XML File

After creating the XML file, it is important to further define the fields on the PDF Form so that they are mapped correctly when users enter in data through Medinformatix. Again, the bottom left side of the MI PDF Generator screen lists all of the fields that have previously been defined in the PDF document during the PDF Form creation process; these are the same fields that will need to be defined.

The following steps outline how to define the fields in the XML file.



MI PDF Template Generator screen

Instructions

Defining Fields On PDF Forms

1. Click on the **fields** in the lower left portion of the **MI PDF Template Generator** screen so that they are highlighted.
2. Right click on the **fields** so that a pop-up menu appears.
3. Click on the **Add** option in the pop-up menu, which will cause all of the fields to be displayed under the **Fields** branch in the upper portion of the **MI PDF Template Generator** screen.

Note: **Global variables** can be added to the **Content** column so that information automatically populates on the PDF Form. To add the global variables, click on the Content column for the field desired and enter the global variable in the space provided.

4. Drag and drop the three **Command Icons** into the **Actions** branch. Again, these are the pre-programmed commands that allow users to clear, save, and exit the form.
5. Type in a **name** for each **action** added. The names can be as simple as **'Save'**, **'Clear'**, and **'Exit'** or they can be whatever the client requests.
6. Click in the **Content** box, which will display a **dropdown** with the three command options.

7. Select the appropriate **command** option for the **action**.

Note: To add **queries** that will execute when the form is opened in MedInformatix, drag and drop the **Query** icon into the **Actions** branch. When entering the action for this item, **'loaddatabase'** should be selected.

Furthermore, if multiple queries should run when the document is opened, more query icons should be added to the **'loaddatabase'** action. Lastly, the query must be defined with which field should populate. Thus, the query should be written in the following format:

Format: SELECT COLUMN NAME AS [FIELD NAME]
FROM TABLE WHERE CRITERIA

Example: SELECT PFNAME + ' ' + PLNAME AS
[PATIENT NAME], SSNO AS [MRN] FROM
CLMASTER WHERE SSNO='&MRNO'

Instructions, continued

Defining Fields On PDF Forms

8. Click on the **+** next to the **Events** branch, which will display a preset event named '**onload**'.
9. Click in the **Action** box for that event. This will display a dropdown menu with all of the current actions listed within it.
10. Select '**loaddatabase**' from the dropdown menu so that when the form loads in MedInformatix it will run the 'loaddatabase' action and populate the form with the entered queries.
11. Drag and drop three **button** icons to the **Controls** branch. These buttons will control the clear, save, and exit actions that have set up.
12. Enter what should appear on the buttons in the **Name** and **Content** boxes.
13. Click in the **Action** box and select the action for the button from the **dropdown** menu.
14. Click in the **Location** box and select if the Button should **appear** at the top or bottom of the screen.
Note: All criteria should now be highlighted in either yellow or green. If there are any boxes highlighted in red, it means that information is required and needs to be filled in.
15. Once all of the actions, buttons, and queries have been **added**, click on the **Start Menu** in the top left corner of the screen.
16. Select the **Publish** option from the **dropdown** menu, which will create both a PDF copy and an **XML** copy of the form with the same document name.
17. Choose the **destination folder** to save the documents in and click on the **OK** button. A confirmation screen will pop up once the project has been published successfully.

Activity 1-5

Defining Fields In The XML For A Created PDF Form

Activity Time:

15 – 30 minutes

Before You Begin:

- Users will need to complete Activity 1-1, Activity 1-2, Activity 1-3, and Activity 1-4 in order to complete this activity.
- Additionally, users will also require access to the XML Creation software for this activity.

Scenario:

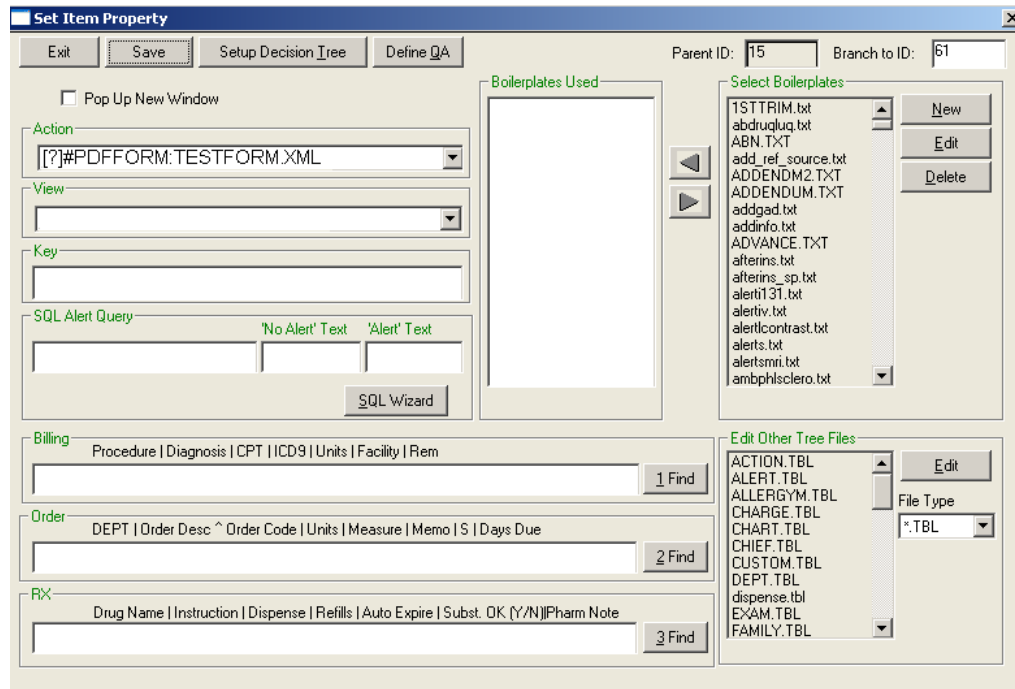
You have started to create the XML file for the new PDF Form that you designed. Now, you want to configure the XML file so that it pulls in information automatically, as well as saves the information inputted by your Front Desk users.

What You Do	How You Do It
1. Activate the data entry fields on the form in the XML file.	<ol style="list-style-type: none">Click on the fields in the lower left portion of the MI PDF Template Generator screen.Right click on the fields so that a pop-up menu appears.Click on the Add option in the pop-up menu.
2. Add the Command Icons for the form to the XML file.	<ol style="list-style-type: none">Drag and drop the three Command Icons into the Actions branch.Type in a name for each action added.Click in the Content box, which will display a dropdown with the three command options.Select the appropriate command option for the action.
3. Add the Actions that should be performed on the form to the XML file.	<ol style="list-style-type: none">Click on the + next to the Events branch.Click in the Action box for that event.Select 'loaddatabase' from the dropdown menu so that when the form loads in MedInformatix it will run the 'loaddatabase' action and populate the form with the entered queries.Drag and drop three button icons to the Controls branch.Enter what should appear on the buttons in the Name and Content boxes.Click in the Action box and select the action for the button from the dropdown menu.
4. Set the Location of the buttons.	<ol style="list-style-type: none">Click in the Location box and select if the Button should appear at the top or bottom of the screen.
5. Publish the XML file.	<ol style="list-style-type: none">Once all of the actions, buttons, and queries have been added, click on the Start Menu in the top left corner of the screen.Select the Publish option from the dropdown menu.Choose the destination folder to save the documents in and click on the OK button.

Setting Up PDF Forms In Medinformatix

In order to access the created PDF forms in the decision tree in MedInformatix, both the reference PDF file and the corresponding XML file must be placed in the Outline Folder. Furthermore, the following Action Property should be used when setting up PDF forms.

[Chart Section]#PDFFORM:FORM NAME.XML



Set Item Property screen

Activity 1-6

Attaching A Created PDF Form To A Decision Tree

Activity Time:

5 - 10 minutes

Before You Begin:

- Users will need to complete Activity 1-1, Activity 1-2, Activity 1-3, Activity 1-4, and Activity 1-5 in order to complete this activity.
- Additionally, users will also require access to the Medinformatix software for this activity.

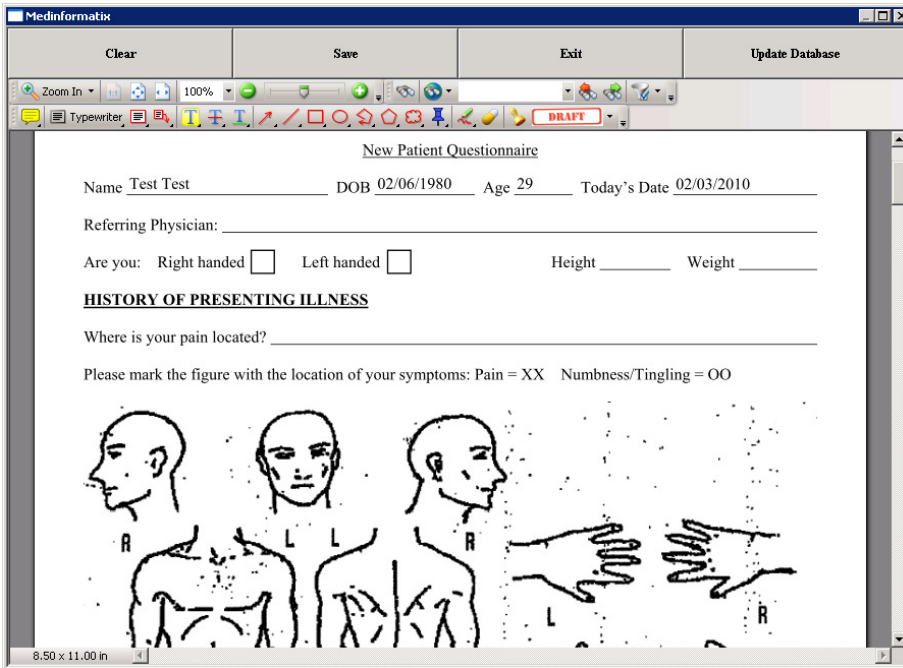
Scenario:

Now that you have completed converting and configuring the new PDF Form that your Front Desk users will be utilizing, you want to load the form onto a branch on the Front Desk decision tree in the Medinformatix software so that it can be tested and, ultimately, used by your staff.

What You Do	How You Do It
1. Locate and access the Front Desk decision tree.	<ol style="list-style-type: none">Access the Patient List screen.Search for a TEST patient.Click on the Chart button.Select the Front Desk decision tree so that you are looking at their workflow branches.
2. Enter the Development Mode for the decision tree.	<ol style="list-style-type: none">Click on the checkbox in the lower left portion of the decision tree screen that is labeled Development Mode.
3. Add a new branch to the Front Desk decision tree.	<ol style="list-style-type: none">Click in the open field next to the Property button.Type the name of the branch in the field.Click on the + button.
4. Add the appropriate Action Property to the new tree branch so that the PDF Form launches when it is selected.	<ol style="list-style-type: none">Click on the new branch so that it is highlighted.Click on the Property button.In the Set Item Property screen, enter in the following property in the Action Property field: [ChartSection]#PDFFORM:FORMNAME.XMLClick on the Save button.
5. Test the branch to ensure that it is functioning correctly.	<ol style="list-style-type: none">Click on the branch so that the PDF Form launches.Complete the form.Click on the Save button to save the form into the test patient's chart.Click on the Chart button in the decision tree to be launched into the Document Repository.Locate and click on the saved document.Verify that the document appears correctly.Click on the Exit button to return to the decision tree.Click on the Exit button to return to the Patient List screen.

Appearance of PDF Forms in Medinformatix

The below is a sample of how PDF Forms appear in MedInformatix.



PDF Form in MedInformatix

Completing a PDF Form




























After users have located the appropriate decision tree branch that launches the PDF Form, they can enter in information into the form prior to saving it to the patient's chart and/or printing it off. To enter information onto the form, users should click within one of the fields on the PDF Form; this, in turn, will activate the field and will store the information entered into it. If the PDF Form has been created to contain pre-populated data, the information will also appear on the form when it is launched in Medinformatix. Furthermore, users can change or modify this pre-populated data as needed by clicking on the field that holds it. If a user clicks on a check box, an X will be placed within the box. Additionally, clicking on the box again will remove the X.

Referring Doctor: TEST DOCTOR, MD _____ Date of Exam: _____
Indications:

Sample Entry Field on PDF Form

Toolbar For PDF Forms

The following chart outlines the buttons and features available to users when working with PDF Forms.

Button	Description
	This removes all information from the document, including any pre-populated data.
	This saves the document to the patient's chart.
	This takes you out of the current form.
	Show Actual Page Size (100%)
	Fit Page by Current View
	Fit Page Width by Current View
	Allows users to Show/Hide the Full Search Pane.
	Finds the Previous Occurrence.
	Finds the Next Occurrence.
	Displays Find Options.
	Allows users to add a sticky note to the document.
	Allows users to type anywhere on the document.
	Allows users to add a text box.
	Allows users to callout certain text within the document.
	Highlight the Selected Text.
	Cross Out the Selected Text.
	Underline the Selected Text.
	Allows users to draw Arrows.
	Allows users to draw Lines.
	Allows users to draw Rectangles.
	Allows users to draw Ovals.
	Allows users to draw Polygon Lines.
	Allows users to draw Polygons.
	Allows users to draw Cloud Boxes.
	Allows users to write and draw free hand on the document.
	Erases only those parts that were drawn by the pencil tool.
	Allows users to stamp the document. A set of standard stamps is provided.

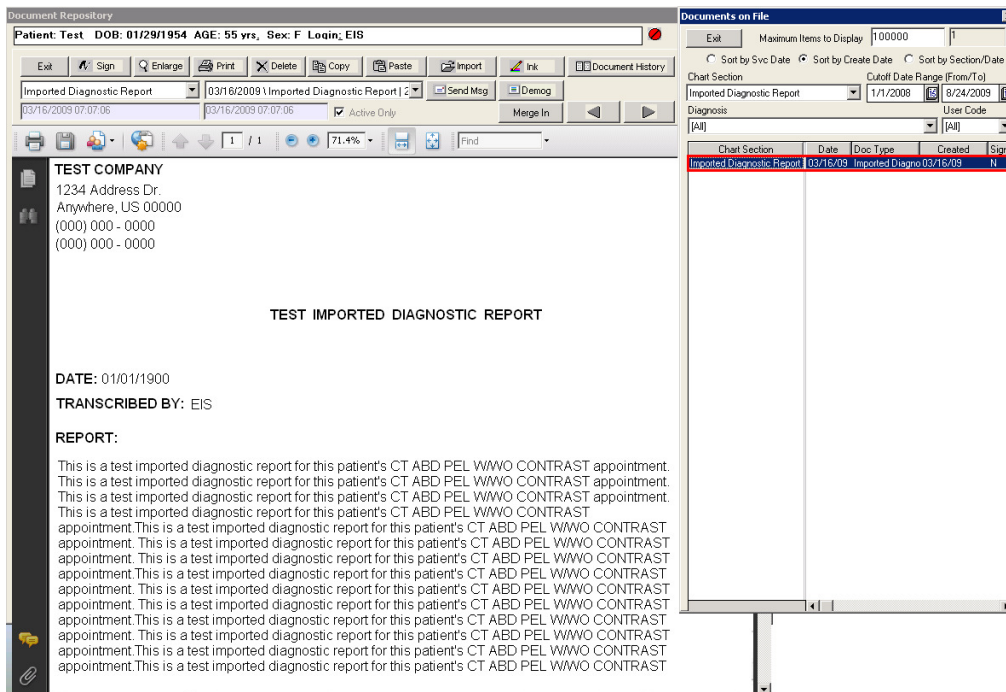
Section 2: PDF Scanning

PDF Scanning

Medinformatix has incorporated the ability to scan documents into patients' charts so that they are saved as a PDF document. One of the benefits of utilizing the PDF scanning feature is that the documents that are scanned into charts are displayed in PDF reader software, such as Adobe Acrobat or FoxIt Reader.

An additional benefit of PDF scanning is that multipage documents can now be saved as single entries in patients' charts. Formerly, if a multipage document was scanned into the chart, it would appear as multiple lines in the Document History. As a result, if the client was sending this document via Active Fax, they would have to fax each page individually. However, PDF scanning eliminates this issue since it acts as a single document in the patient's chart.

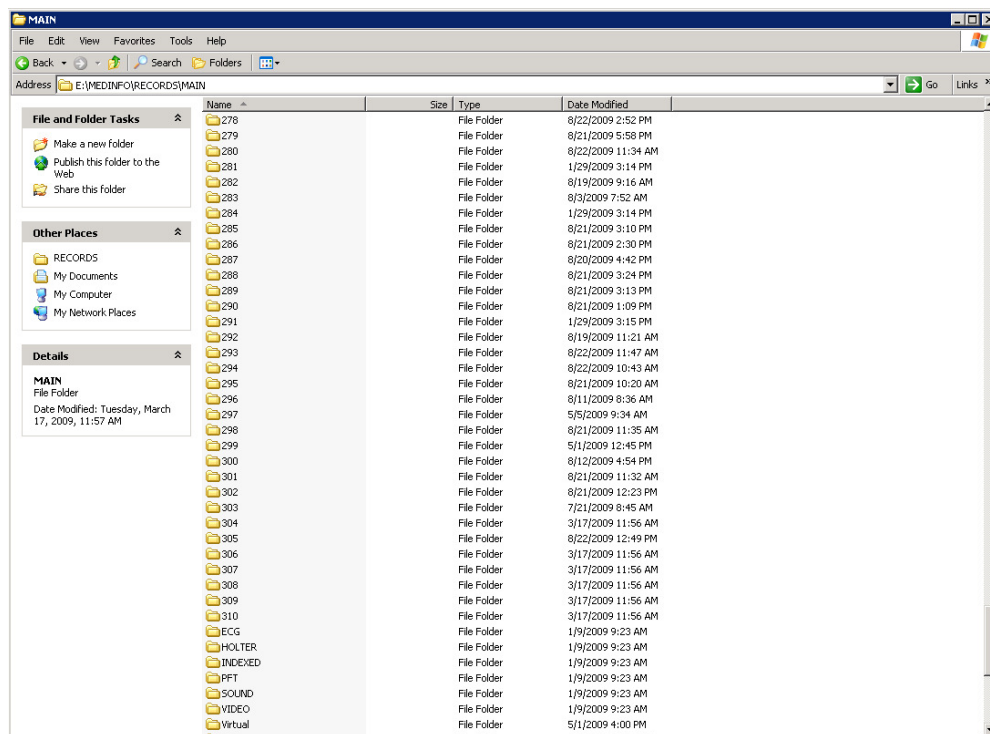
The following sections will discuss additional features of PDF scanning, including how to setup this feature in Medinformatix.



Document Repository screen

Chart Section Setup For PDF Scanning

It is important to remember when creating new document folders that if the chart section number is higher than 255 that a new corresponding folder will need to be created in the Records folder. Additionally, PDF documents are saved within the Virtual folder path, so it is crucial that chart sections that are going to be utilized for PDF scanning must also have the Virtual Documents Folder Path portion of the Documents Folders screen completed correctly.



Medinformatix Setup Folders

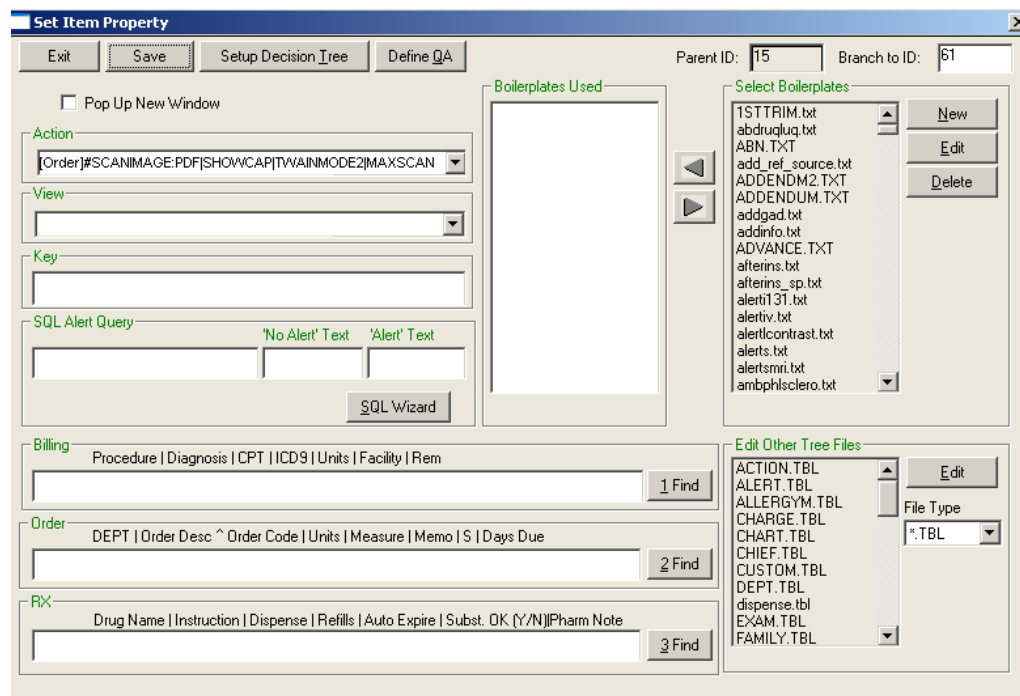
Default PDF Reader

The default PDF reader that opens the PDF documents within the MedInformatix software should also be the default reader on each user's computer. If a PDF reader has not been downloaded onto users' computers, users will not be able to open PDF documents within the chart in Medinformatix. Furthermore, if the client is utilizing Citrix, the default PDF reader must also be downloaded onto the Citrix server.

PDF Scanning Action Property

The following action property should be utilized when setting up PDF scanning in the decision tree in Medinformatix.

[CHARTDISPLAYNAME]#SCANIMAGE:PDF



Set Item Property screen

Resolution Settings For PDF Scanning

Users may need to increase the resolution of specific documents, such as Diagnostic Reports, that are utilizing PDF scanning in Medinformatix. Increasing the resolution helps to relieve any blurriness that may be occurring in the documents, which in turn makes for a crisper, cleaner looking image when documents are sent through the ActiveFax software or other faxing software. The resolution on documents can range from 150 to 250.

Activity 2-1

Creating A PDF Scan Branch In Decision Tree

Activity Time:

5 minutes

Before You Begin:

- Users will also require access to the Medinformatix software for this activity.

Scenario:

Your site has decided to utilize the new PDF Scanning feature available in the Medinformatix Version 7 software. You want to create a new branch that will allow your Front Desk users to scan in a document and have it saved into the patient's chart in the PDF format.

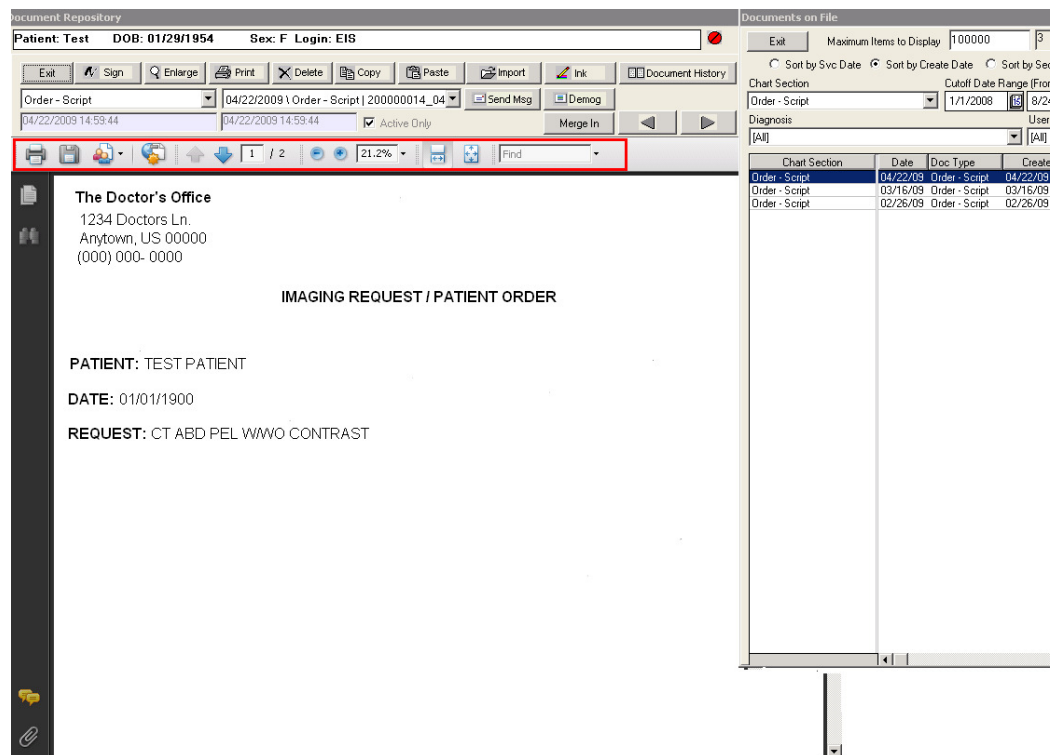
What You Do	How You Do It
1. Locate and access the Front Desk decision tree.	a. Access the Patient List screen. b. Search for a TEST patient. c. Click on the Chart button. d. Select the Front Desk decision tree so that you are looking at their workflow branches.
2. Enter the Development Mode for the decision tree.	a. Click on the checkbox in the lower left portion of the decision tree screen that is labeled Development Mode .
3. Add a new branch to the Front Desk decision tree.	a. Click in the open field next to the Property button. b. Type the name of the branch in the field. c. Click on the + button.
4. Add the appropriate Action Property to the new tree branch so that users are able to scan in documents and convert them to the PDF format.	a. Click on the new branch so that it is highlighted . b. Click on the Property button. c. In the Set Item Property screen, enter in the following property in the Action Property field. [CHARTDISPLAYNAME]#SCANIMAGE: PDF d. Click on the Save button.
5. Test the branch to ensure that it is functioning correctly.	a. Place a test document in your scanner. b. Click on the branch so that the scanner is initialized and the document is scanned. c. Click on the Chart button in the decision tree to be launched into the Document Repository . d. Locate and click on the saved scanned in document. e. Verify that the document appears correctly. f. Click on the Exit button to return to the decision tree . g. Click on the Exit button to return to the Patient List screen.

PDF Toolbar In Document Repository

When documents are scanned and saved into a patient's chart via PDF scanning, users will see the PDF toolbar appear when viewing the document in the Document Repository screen. The icons on the toolbar will initially be the icons within the MedInformatix PDF toolbar. However, users can customize this toolbar right clicking on their mouse and selecting the More Tools option for the pop-up menu. Additionally, if users would like to make the toolbar disappear completely, they should press the F8 button on their keyboard.

Notes:

Users found that they had to hit the print icon *within* the PDF toolbar to print PDF documents. The MedInformatix print button often would not work.



Document Repository screen

Notes
