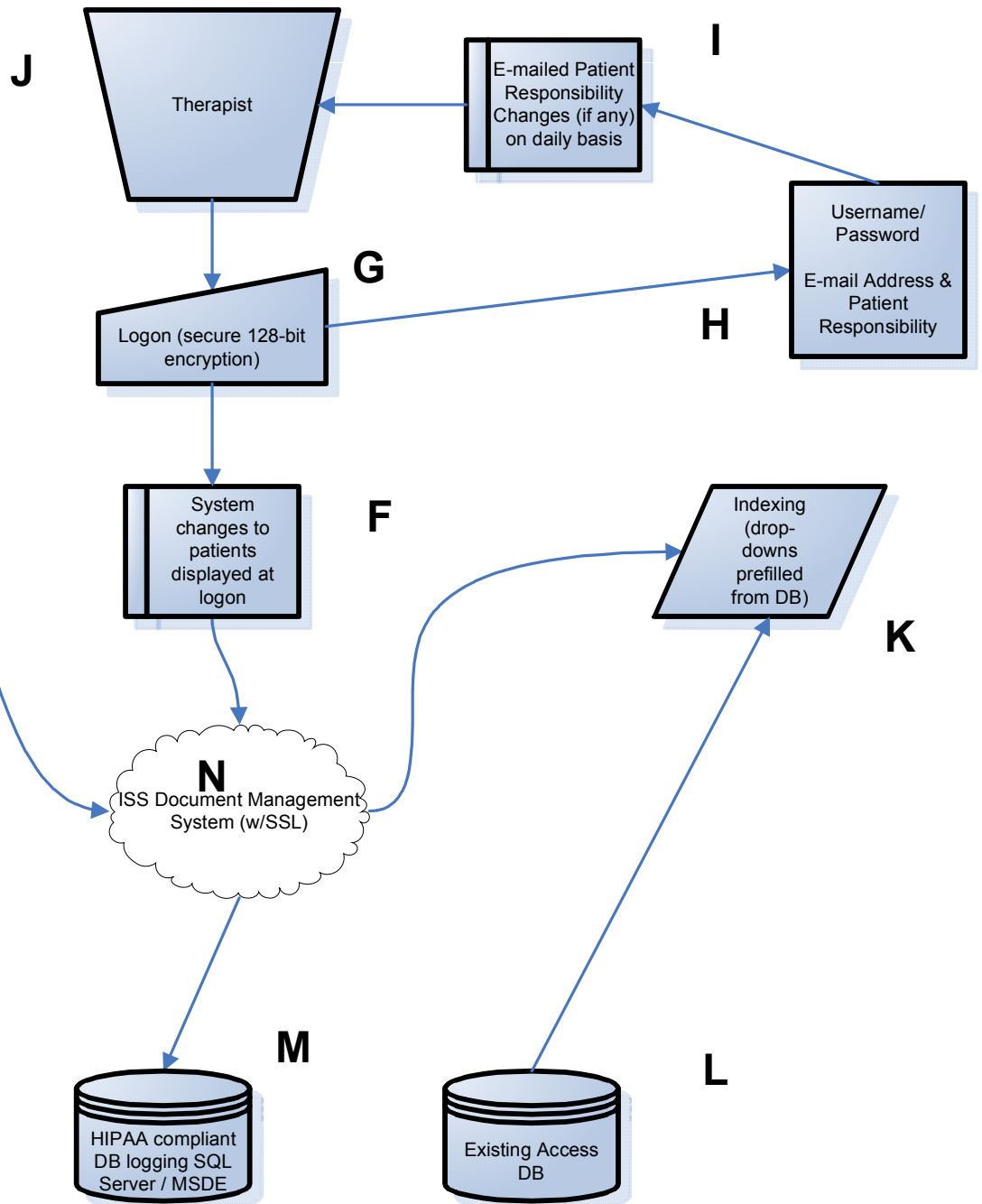


ISS DMS

- 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 displays the ISS BC application interface. On the left, there is a 'Directory' tree view showing a hierarchy of folders including 'Customer_Documents', '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. Above the directory tree is a 'File To Import' field containing 'TheFileName'. On the right side, there are several data entry fields organized into sections: 'I ext' (Account_Number, Client_Name, Doc_Type, First_Name, ID_Number, Last_Name, Sections, Serial_Number), 'Numbers' (AccountNumber, Number, PrescriptionNumber), and 'Dates' (Date, InvoiceDate). Each field is represented by a text input box.

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.

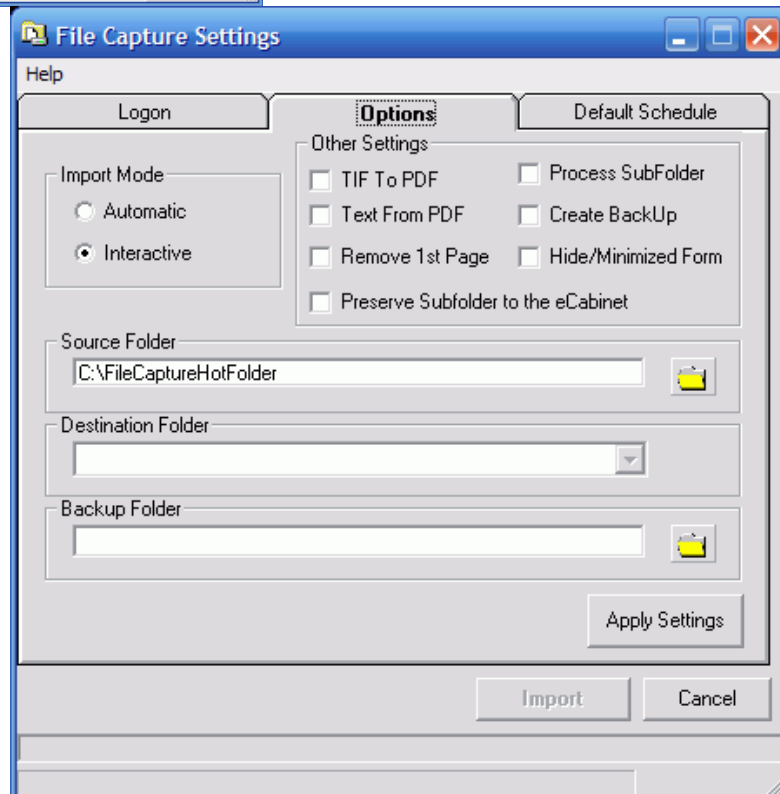
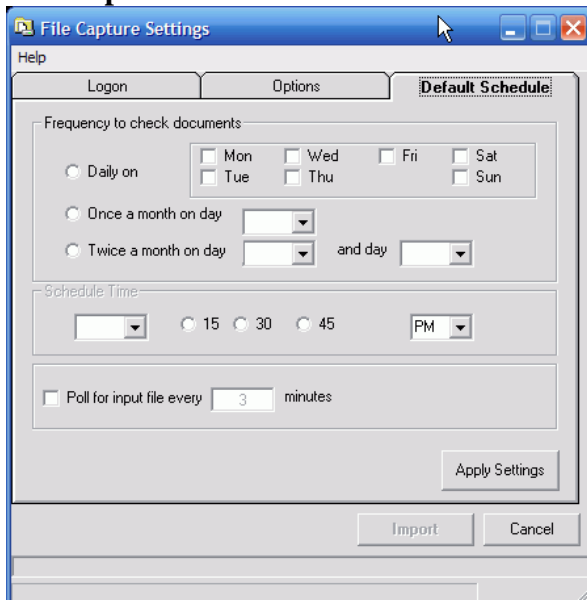
Scan the batches on a scanner or MFP

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> |
|----------------------|-----------------|-----------------|--------------------|---------------------|
| Edit | admin | admin | built in user | 6/1/2006 1:03:00 PM |

1

Add Group:

 **Group Information**



Group Name:

Description:

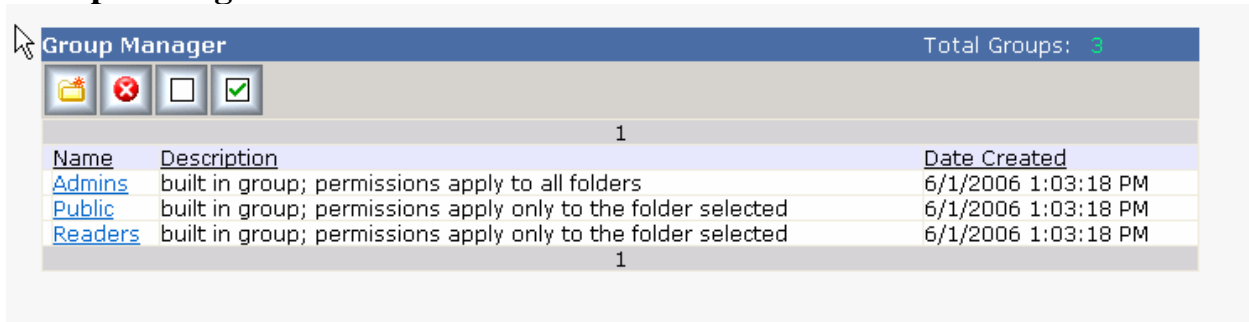
[Members](#) [Permissions](#)

| All Users | Current Users |
|----------------------|---------------|
| <input type="text"/> | ADMIN |

| All Groups | Current Groups |
|-------------------|----------------|
| Admins Readers | PUBLIC |

 Save  Cancel

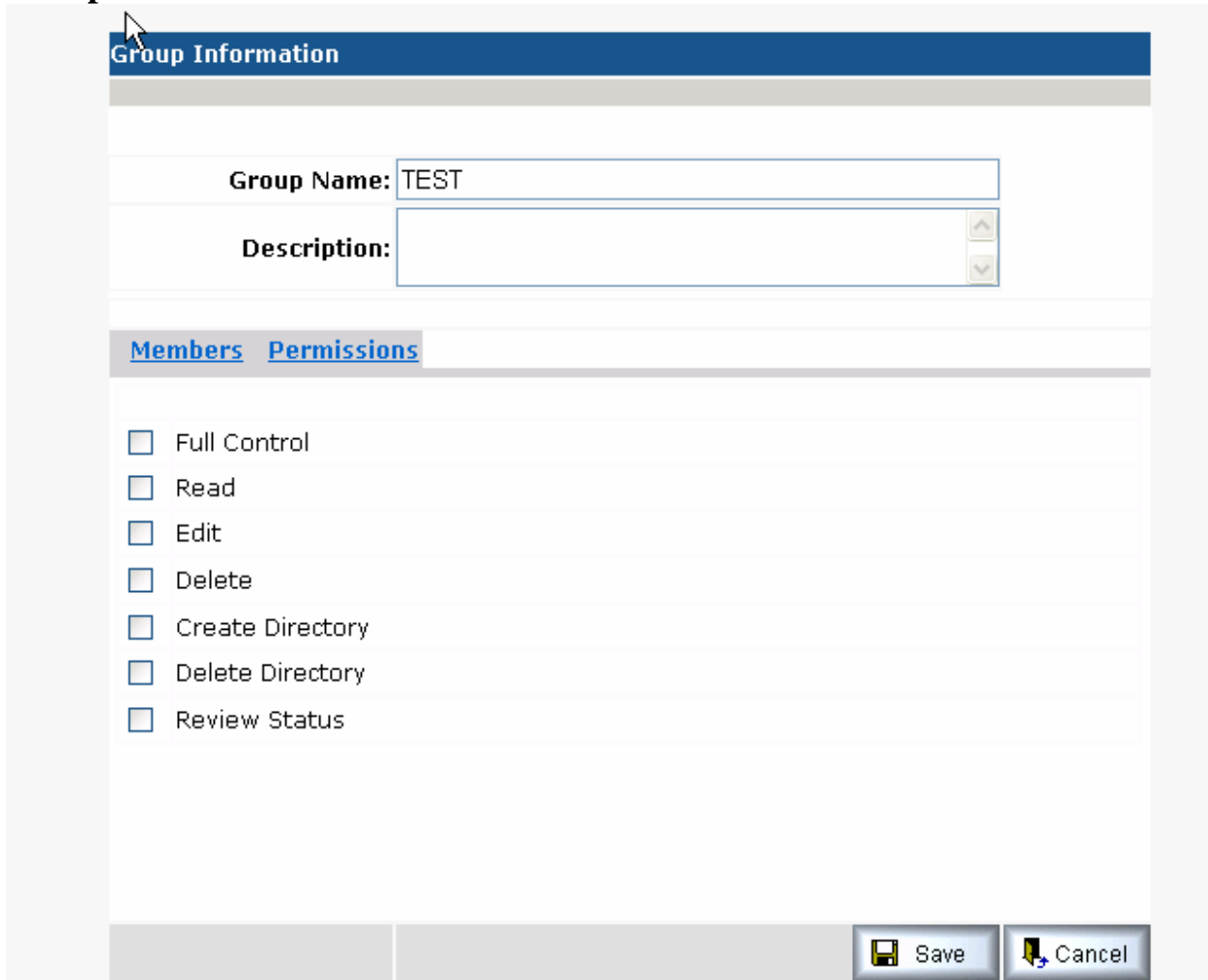
Group Manager:



The Group Manager interface displays a table of groups. The table has three columns: Name, Description, and Date Created. There are three groups listed: Admins, Public, and Readers. The Admins group is selected, and its description is "built in group; permissions apply to all folders". The Public and Readers groups are also listed with their respective descriptions and creation dates.

| Name | Description | Date Created |
|-------------------------|---|---------------------|
| Admins | built in group; permissions apply to all folders | 6/1/2006 1:03:18 PM |
| Public | built in group; permissions apply only to the folder selected | 6/1/2006 1:03:18 PM |
| Readers | built in group; permissions apply only to the folder selected | 6/1/2006 1:03:18 PM |

Group Permissions:



The Group Permissions interface shows the configuration for a group named "TEST". The "Group Name" field is filled with "TEST" and the "Description" field is empty. Below the fields are two tabs: "Members" and "Permissions". The "Permissions" tab is selected, and it shows a list of permissions with checkboxes next to them. The permissions listed are: Full Control, Read, Edit, Delete, Create Directory, Delete Directory, and Review Status. At the bottom right of the interface 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

| | Admission Status | Description |
|--------------------------|--|-------------|
| <input type="checkbox"/> | Edit Primary | |
| <input type="checkbox"/> | Edit Significant Other | |

1

Folders:

Folders Total Folders: 1

| | Filename | Capture Date | Owner | Viewer |
|--|---------------------|--------------|--------|--------|
| | New | | admins | 1 |

1

Edit Index Value:

Admission Status Total Status: 2

| | Admission Status | Description |
|--------------------------|--|-------------|
| <input type="checkbox"/> | Update Cancel Primary | |
| <input type="checkbox"/> | Edit Significant Other | |

1

Sample Indexes:

| Index Manager | | Total Indexes: 9 |
|----------------------|----------------------|------------------|
| 1 | | |
| Index Name | | |
| Edit | Admission Status | |
| Edit | Axis Diagnostic Code | |
| Edit | Document Type | |
| Edit | Drug Of Abuse | |
| Edit | Ethnicity | |
| Edit | Gender | |
| Edit | Marital Status | |
| Edit | Medicaid Status | |
| Edit | 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 | |
|----------------------|---------------------------|
| Filename: | confm.pdf |
| Document Type: | Type3 |
| Review Status: | [Select Status] |
| Folder: | Home\New |
| Personal Information | |
| Client ID: | 12345 |
| Site ID: | |
| Firstname: | Hinden |
| Lastname: | Barredo |
| SSN: | 123-45-1111 (xxx-xx-xxxx) |
| Date of Birth: | (yyyy-mm-dd) |
| Race: | [Select Race] |
| Ethnicity: | [Select Ethnicity] |
| Gender: | [Select Gender] |
| Marital Status: | [Select Status] |
| Number of Children: | [Select No. Of Children] |
| Age of Child 1: | [Select Age] |

