FabSoft Demo Manual

Form Medic
Surgical Procedure

www.fabsoft.com

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About MOST

Modular Object Scanning Technology is the perfect scanning solution that enables effortless distribution of documents right from the convenience of the MFP display screen. If a user scans a document that needs to be emailed to another department, faxed to a client, archived to the company's document repository, and printed; all four actions can be completed right from one location. Additionally, since MOST is built upon a framework it can be used as a powerful and robust template that can be modified and adjusted as needed to fit any document workflow.

Healthcare, government, insurance, legal markets and more, generally require document information to be securely encrypted. MOST includes 512-bit encryption for all communication between the MFP and the server. All login requests, data transfers, and scanned documents are encrypted using 512-bit encryption. Along with guaranteeing the security of document information, MOST also ensures that they are efficiently and reliably delivered. MOST performs intelligent enterprise-wide load and error balancing, so inoperable or busy devices are bypassed. MOST also maintains real time status logs that enable users to check the delivery status of their documents. The status log is available right at the MFP screen as well as on a web server, with both locations permitting modification control so the user can assist in document delivery.

About Form Medic

Form Medic is an innovative solution that replaces paper forms with electronic ones and allows healthcare personnel to access, fill in and process them from the most convenient location – the MFP screen. With Form Medic, users can select the form they need from an entire library of forms listed right on the MFP screen, providing on-demand access to the important forms they need. Not only does this provide convenience, but it also ensures that the most up to date forms are being utilized throughout the entire facility. By using Form Medic's lookup function, specific patient information can be used to automatically fill in some of the form fields so the form is printed with accurate and legible information. As a result, the potential of fatal errors due to unclear handwritten information are eliminated and the quality of patient care is improved. Additionally, when forms are completed and scanned, Form Medic can intelligently distribute them to any needed devices such as printers, fax, email and archive systems, enabling automatic communication of important information to different departments, physician's offices, insurance companies and the hospital ERM.

Introduction

Document Flow

Document flow describes the path documents take throughout a company. For the cases described in this document, it shows how a release form is printed directly from the MFP, by using MOST's Form Medic. The form is then completed by the patient and is scanned back into the system. The document flow continues based on whether a signature was found or not. For this demonstration, if a signature is not found, a warning will be printed asking for the document to be signed and scanned again. Once the signature is found, an anesthesia medical record form and a pre-evaluation form are printed. Once these are completed by a doctor, they are also scanned for archiving.

About This Document

This manual describes the steps in a demonstrative document flow for hospital forms. To start, a surgery example is followed by a description of the document flow. Then, the steps of the demonstration of hospital forms are described in detail.

Terms & Definitions

- Tag Doc: Reform feature that allows the addition of barcodes to documents, store the document contents as text, scan the documents in as an image file (TIF) and retrieve the document details in real-time.
- Form Linking: Allows multiple overlays to be used on the same text file. Also allows document routing to multiple locations.
- Form Overlay: Overlays are created using the Reform Designer.
- SavetoFile: A Reform script which copies the current file to a specified directory.
- Form Medic: Part of MOST that allows documents to be filled in with information from a database, and printed as well as other features.
- MFP   Multi-Function Peripheral. Such as a combined fax, copier, printer and scanner.
- MOST   Modular Object Scanning Technology

For other information regarding Reform, Tag Doc, MOST, or if you have any questions or comments, please feel free to contact us via our website: http://www.fabsoft.com.
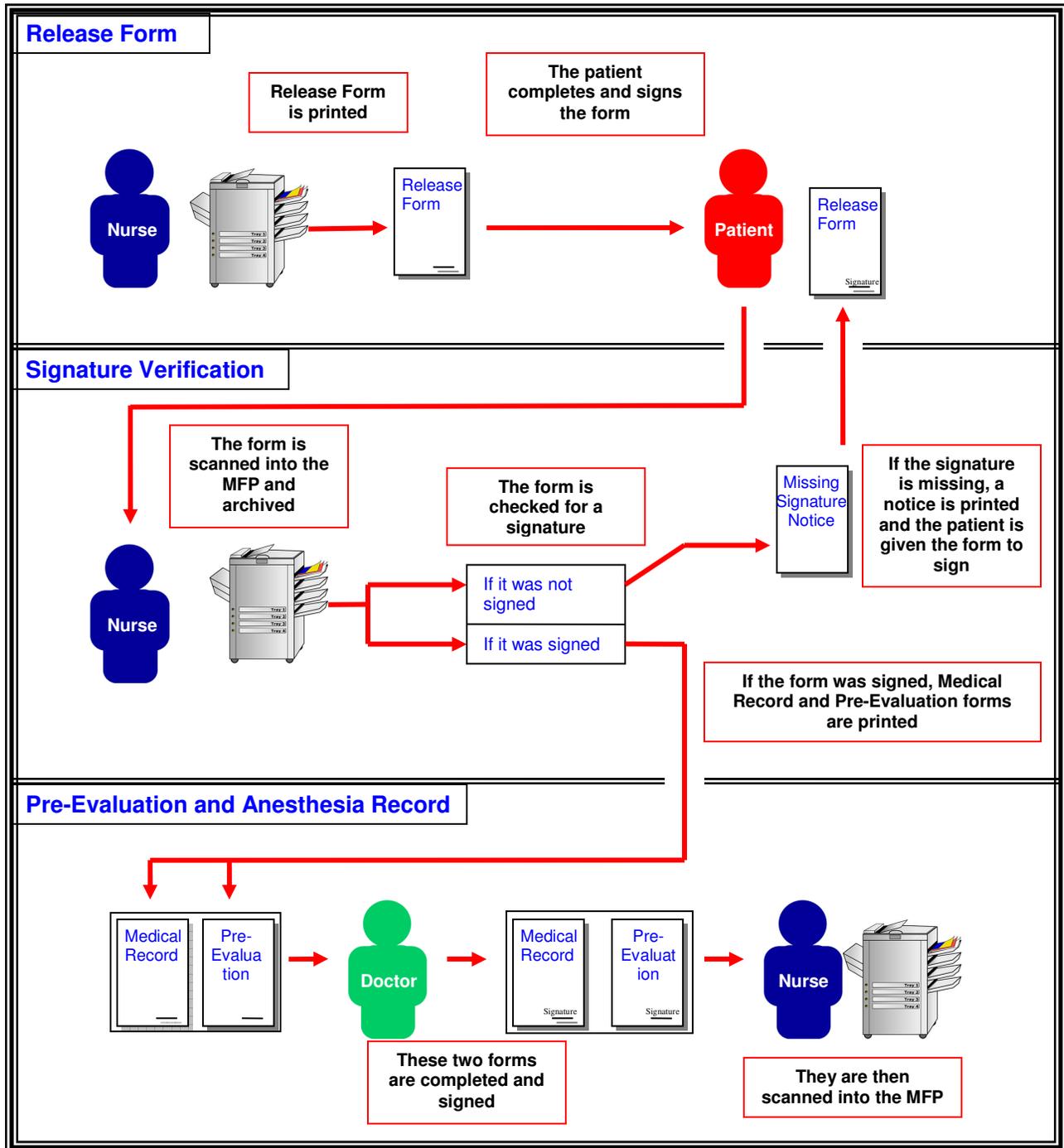
Example of a Surgical Procedure

We will start this example with a patient that needs a hernia operation. (The patient has been admitted to the hospital prior to the surgery). One of the nurses would then go to the MFP, select the Form Filler + tab, the appropriate form, and the patient's name. Once this is done, the form will be printed with the patient's information already filled in. The patient will then complete the form by signing it. Next, the nurse will use the MFP to scan the completed form. Upon scanning, the system then makes a decision. If the patient's signature was not found, it prints a notice asking for the form to be signed and re-scanned. If it was found, Pre-evaluation and Anesthesia Medical Record forms are printed with the patient's information included. These two forms are then completed by the doctor and signed. Lastly, they are then scanned using the MFP and all signed forms are digitally archived.

Document Flow for a Surgical Procedure

1) A nurse prints out a release form for a patient using Form Medic.
   a. Since the patient has already been admitted to the hospital, his information is already on file.
2) The patient completes the form and signs it.
3) The form is scanned back into the MFP.
4) A digital copy is archived.
5) Pre-Evaluation and Anesthesia Medical Record forms are printed with the patient's information completed.
6) The doctor then completes the rest of the forms and signs them when he is done.
7) The forms are then scanned into the MFP.
8) A digital copy of each form is then archived.

Document Flow Chart

Release Form

Release Form is printed

The patient completes and signs the form

Nurse → Release Form → Patient → Release Form
Signature

Signature Verification

The form is scanned into the MFP and archived

The form is checked for a signature

Nurse

If it was not signed

If it was signed

Missing Signature Notice

If the signature is missing, a notice is printed and the patient is given the form to sign

If the form was signed, Medical Record and Pre-Evaluation forms are printed

Pre-Evaluation and Anesthesia Record

Medical Record | Pre-Evaluation → Doctor → Medical Record Signature | Pre-Evaluation Signature → Nurse

These two forms are completed and signed

They are then scanned into the MFP

Demonstration Overview

Release Form

To start the scenario, a patient, who has been admitted to the hospital prior to this occasion, has been admitted for hernia surgery. The nurse needs to print a release form. The nurse would go to the MFP, login at the MFP screen using his/her user name and password, and access Form Medic. From there, they would select the release form, select the patient's name and press Process.
Seconds later, the form is printed with the patient's information completed on the form. The patient would then complete all necessary fields and sign the form. The nurse would then take the form and scan it into the system using the MFP.

Signature Verification

Form Medic is now capable to detect signatures, and make decisions based on the results. Here, if the patient's signature was not found on the form, a notice would be printed letting the nurse know that it must be signed and re-scanned.

Pre-Evaluation and Anesthesia Record

Here, a Pre-Evaluation form, as well as an Anesthesia Record form is printed for the surgeon's use. These forms are typically used for surgical procedures, and Form Medic completes all information that can be collected from the database, making it a more efficient process. Once the doctor is finished with these forms, he signs them, and scans them into the MFP to be archived.

Detailed Demonstration

MOST Setup

1)   Press Login
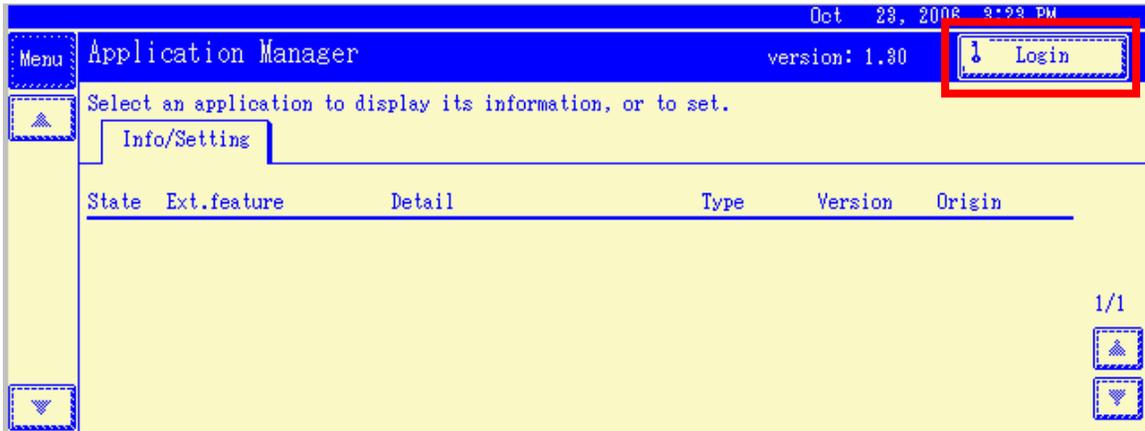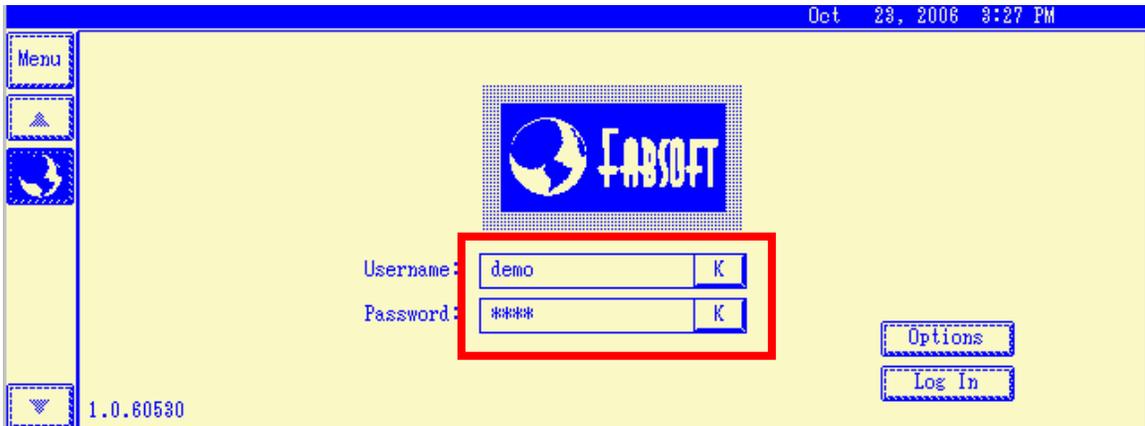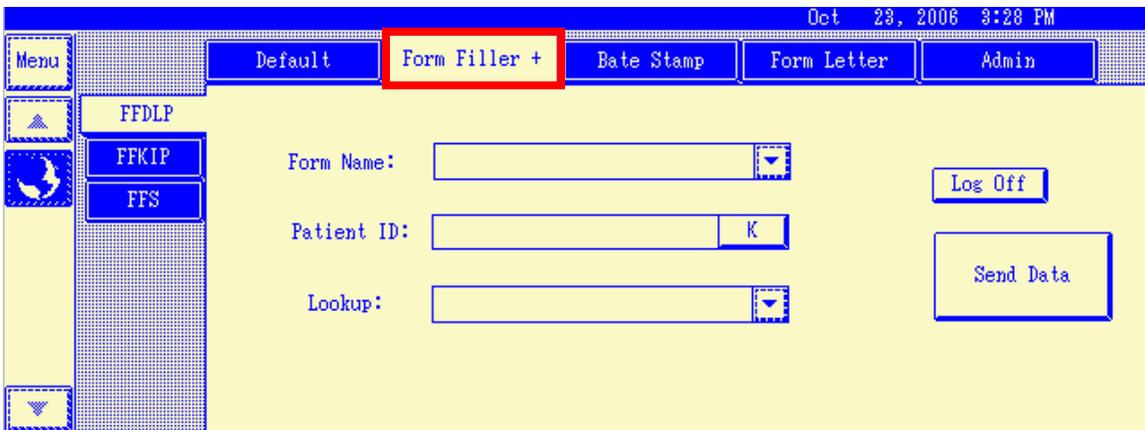

2)   Press the # Symbol
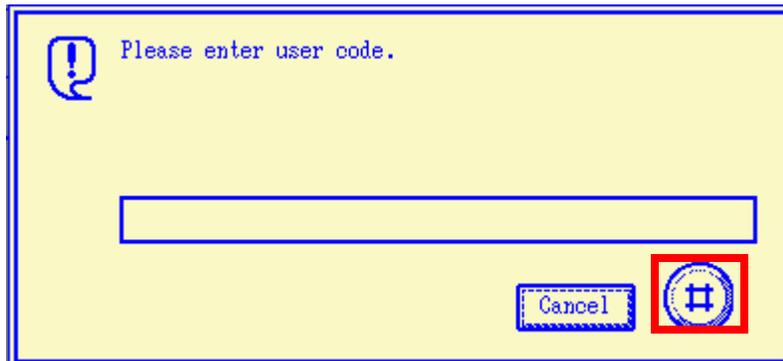
3) On the Start/Stop Tab, Press MostMostxlet1.OHDD
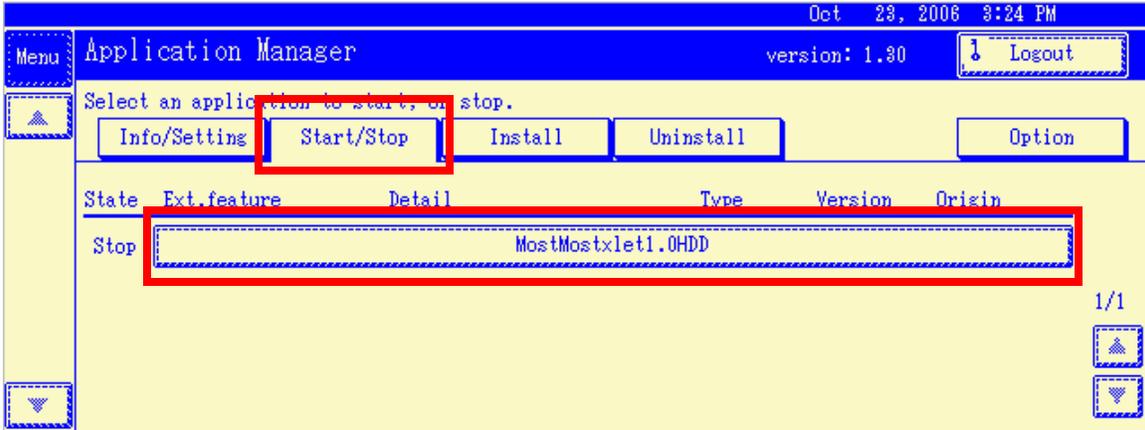
4) Press Execute

5) Use demo for the username and password to login

6) By pressing the Form Filler + Tab, you are now ready to use Form Medic

Release Form

1) A patient, who has been admitted to the hospital prior to this occasion, has been admitted for a hernia surgery.

2) The nurse needs to print a release form. To do this, they would go to their MFP, and using their user name and password, access Form Filler +. From there, they select the appropriate form and patient's name then press Send Data.
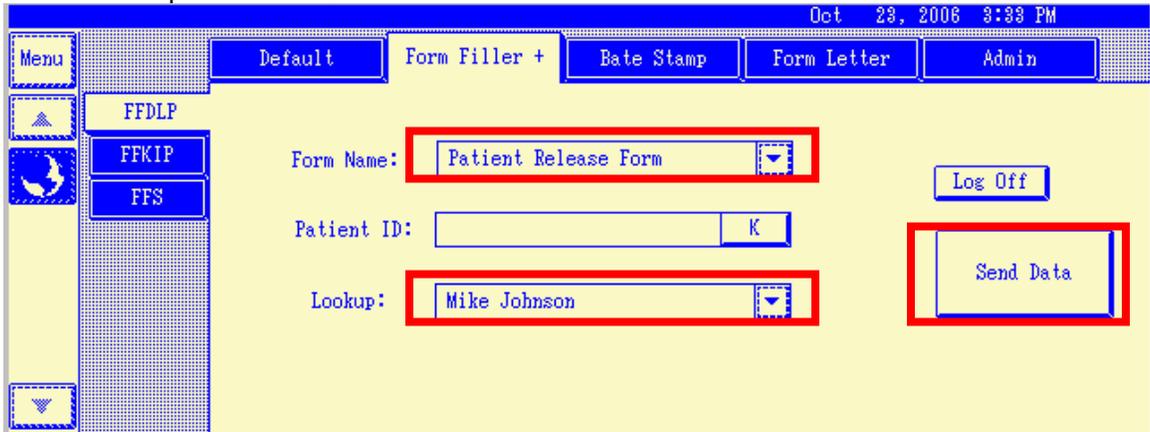
3) When Send Data is pressed, MOST sends 2 files to the server.
   a. Form Filler Database Lookup Print.demo101820061.fcl
   b. Form Filler Database Lookup Print.demo101820061

   These files contain information such as, the selected form and the patient's ID

   ```
   _Form=HerniaAgreement
   _PatientID2=123
   ```

4) These files are created in the spooler directory, so that they load the Form Filler Database Lookup Print.FOM. This form has Form Filler.fbs as its page process script, which loads the correct form from the fcl file.

5) For our case, it will apply the HerniaAgreement.fom to the information in the fcl file.

6) The form then uses the page process script "Health Insurance Claim Form.fbs" to get the patient's information from the database and uses it to fill in the form. This form also uses the TagDoc.fbs script to add the barcode on the form to the database.

7) The form is then printed back to the MFP where the nurse is working.

8) The patient and doctor then complete, sign, and date the form.

9) The nurse scans the document into the MFP using Form Medic. To do this, press the "FFS" tab on the left side. Then press Process.
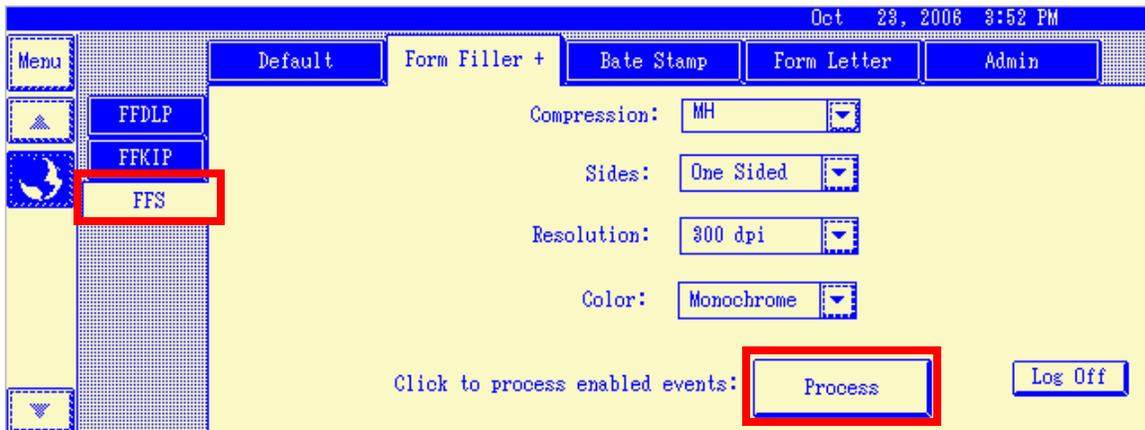
10) When this is done, MOST places 2 new files into the spooler directory. It also puts the scanned Tiff image into the Spooler\Imagequeue\ directory
   a. Form Filler Scan.demo101820062.fcl
   b. Form Filler Scan.demo101820062

   This fcl file contains the location that the Tiff image is located at

```
_Image[0]=C:\Program Files\Reform\Spooler\imagequeue\demo10232006356188610000.tiff
```

11) The Form Filler Scan.FOM form is then opened. This form uses the location of the Tiff file, and copies the file to the ScanDirectory1 for ImageProcess to process it.

Signature Verification

12) ImageProcess.fbs reads the barcode from the scanned image, and then uses it to access the database and retrieve the patient's information. It also checks for a signature by comparing the density of black pixels of a specified area to a set value. A file is created in the spooler directory containing the patient's information, the barcode, as well as the name of the form+"Scanned"
   a. If the form is not signed, a notice is printed letting the nurse know that it must be signed and re-scanned. This is done by appending "_Unsigned" (HerniaAgreementScanned_Unsigned.fom) to the form name in the text file. This then opens the correct form to print a notice.
   b. If the form is signed, the correct form is loaded (HerniaAgreementScanned), and is used in the next few steps.

Sample Spooler File with patient information, barcode, and form name.

C:\Program Files\Reform\ScanImages\TagDOCU3I656Q5R965M1.tif — **Tif file location**

MFP1 — **Printer Profile**
HerniaAgreementScanned   SR000000059 — **FormName + "Scanned"**, **Barcode**
PatientName = Mike Johnson
PatientStreet = 31 Washington Street
PatientCity = Montville
PatientState = NJ
PatientZip = 07045
PatientID = 123
PatientPhone = 973-575-1812
InsuranceCompany = More Insurance
InsuranceIDNo = 546456465
InsurancePlan = PPO
DoctorsName = Jack Taylor
SSNo = 574769087 — **Patient's Information**

Pre-Evaluation and Anesthesia Record

13) The "HerniaAgreementScanned" Form Key Field is used to apply the corresponding form to the text file. This form uses the SaveToFile script to copy the scanned image to a specified folder for archiving. It also is linked to the "HerniaMedicalRecord.fom" form.

14) The "HerniaMedicalRecord.fom" form uses the information in the text file to complete the selected form. It also uses the Tag Doc page process script to use the barcode on the form. This form is linked to the "HerniaEvaluation.fom" form.

15) The "HerniaEvaluation.fom" form uses the information in the text file to complete the selected form. It also uses the Tag Doc page process script to use the barcode on the form.

Medical Record   Pre-Evaluation

16) These forms are both then completed by the medical staff prior and during the surgery. Once they are completed, they are scanned using Form Medic as was done before.