

Scanning Documents in SmartCare



This Job Aid outlines the process for scanning documents into SmartCare and associating those documents to a document type, program and client. It is based on the documentation available on the CalMHSA website, however, there are certain key steps which are missing from some of those documents, so we have created this Job Aid as a single, complete reference source.

This document also identifies a risk with “unassociated” documents in the system. **Unassociated** documents are documents that have been scanned but not associated to a particular client or program.

Starting immediately, all programs will be responsible for performing regular audits in SmartCare to identify users at their site with unassociated documents in SmartCare. You will need to contact the responsible individuals and have them correctly associate these documents. The steps for how to do this are detailed in this document.

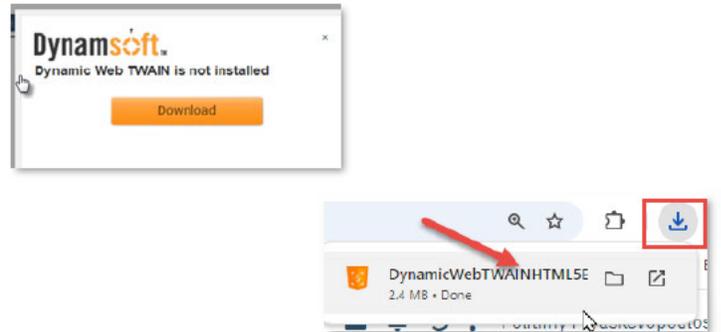
Scanning and Uploading Documents	
Step	Screenshot
<ol style="list-style-type: none"> *From the “search” (magnifying glass) icon, search for “scan”. Select Scanning (My Office) <p>The Scanning list page screen will open.</p>	<p>*If you have a client open prior to this step, you will not need to search for a client later in the workflow.</p>
<ol style="list-style-type: none"> The available scanning and uploading options are in the upper right corner of the screen. <p>Select the Scan New Images icon (if you are using an external scanner**) or the Upload New Images icon (if you have an electronic file saved on your computer you want to import).</p>	<p><i>We do not recommend using the Batch Scanning or Batch Upload options at this time.</i></p>

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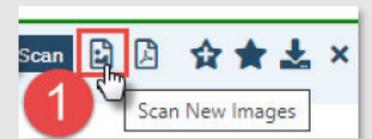


Scan New Images Workflow

****If you are using an external scanner, you will need to install a new driver prior to starting this process. Depending on your organization's security, it may require the credentials of an admin to install: <https://2023.calmhsa.org/twain-driver-instructions/>**



1. Select the **Scan New Images** icon



2. Once you have selected **Scan New Images**, your scanning hardware will initialize. Follow the instructions on the screen and if successful, an image of the scanned document will display in the center pane on the screen.



Complete the information from the dropdown fields at the top of the **Scanned Medical Record Detail** screen.

3. Select **"Client (Medical Records)"** from the dropdown.
4. If you didn't have a client record open before scanning (see above), click the **"..."** button to search for the client. Otherwise, the client's name will appear here.
5. Enter the **Effective** date.
6. Select a **Record Type** from the dropdown.
7. Type a **Description** of the document into the free text field.
8. Select the correct client **Program** from the dropdown.

9. Click **Save** in the upper right corner of the screen.



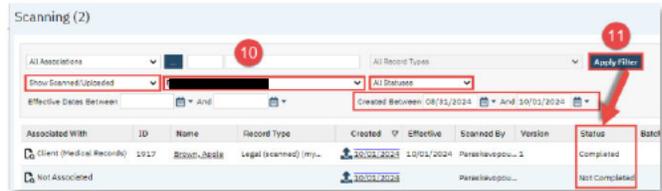
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Close the window using the **X** in the upper right corner of the screen. This will take you back to the **Scanning** list page.

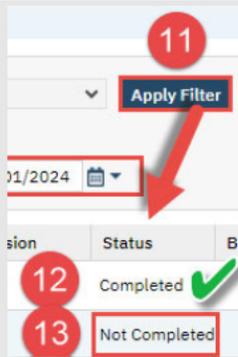
10. Use the dropdown filters at the top of the screen to narrow the results by your **name**, a date range to include **8/31 to the present date**, **Show Scanned/Uploaded**, and **All Statuses**.

11. Select **Apply Filter**. This will show all your **Completed** and **Not Completed** scans/uploads.



12. For scans marked as **Completed** in the **Status** column, no further action needs to be taken.

13. For those marked **Not Completed** you will need to take further action to correctly assign the documents to the client record.

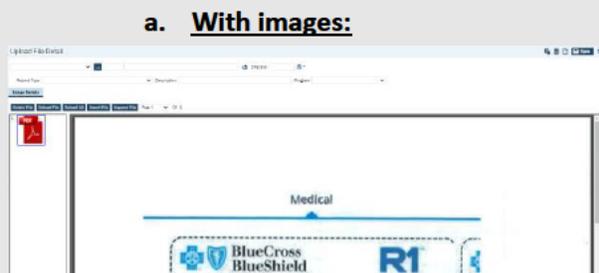


If you find records that are marked as **Not Associated** and/or **Not Completed**, select the date hyperlink for the document under the **Created** column. This will reopen the **Scanned Medical Record Detail** screen for the document in question.



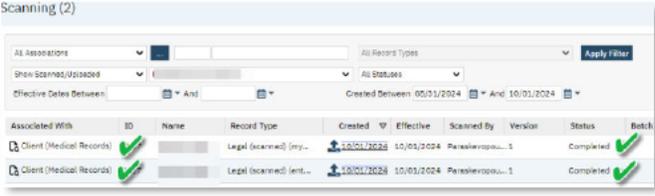
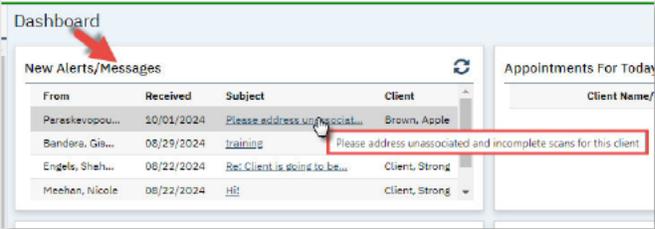
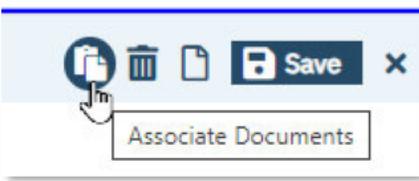
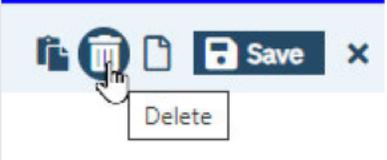
14. When you click on the date to open the document one of two types of "Unassociated" documents will appear:

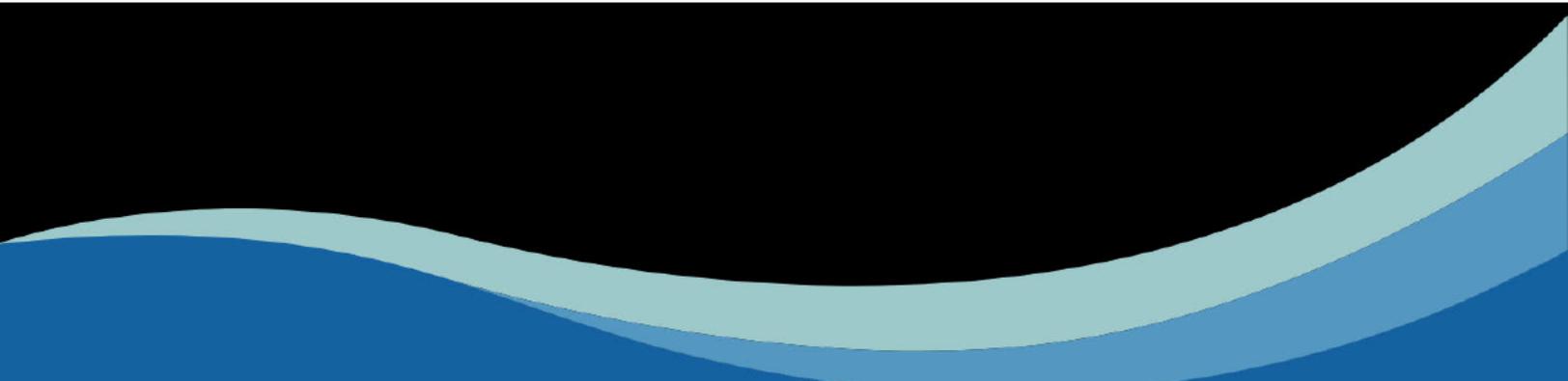
a. **With Images:** For documents that have images, use the dropdowns and text boxes at the top of the screen to enter the appropriate information to associate the document to the correct client, record type, program, etc. and save



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<p>b. Without Images: For documents without images, you will need to scan a document to a client, complete the details in the top dropdown boxes and save the document.</p> <p>15. Enter all the patient's and program details using the dropdown boxes at the top</p> <p>16. Select Save</p>	<p>b. Without Images:</p> 																														
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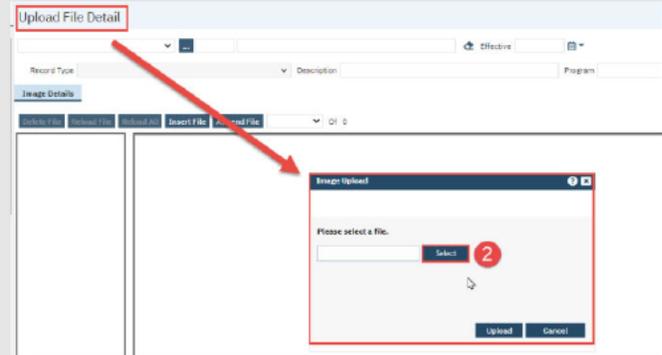
Upload New Images Workflow

1. Select the **Upload New Images** icon.

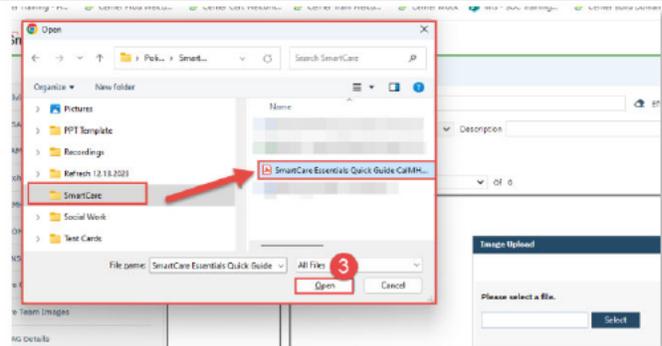


The **Upload File Details** screen will open along with the **Image Upload** pop-up box in the center of the screen.

2. Press **Select** to navigate to the saved document on your computer.

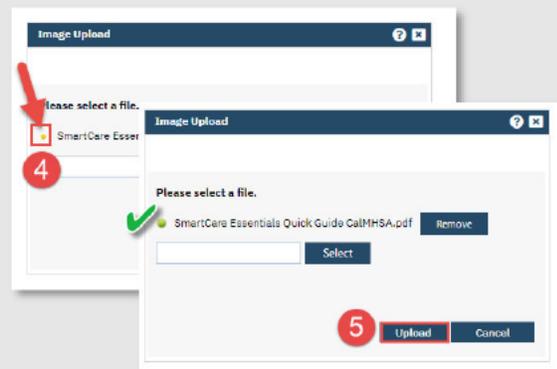


3. The **File Explorer** window on your computer will open. Use this to navigate to and select the document you wish to upload. Select **Open**.



4. It may take a moment to upload. You will see a pulsing orange dot while the system is processing.

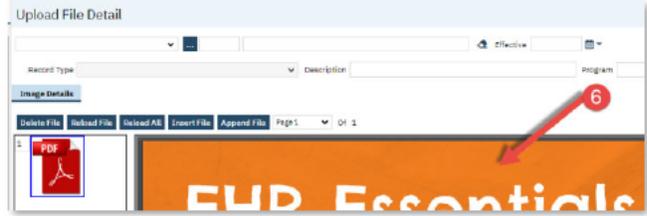
5. Once complete, this dot will turn green. Select **Upload**.



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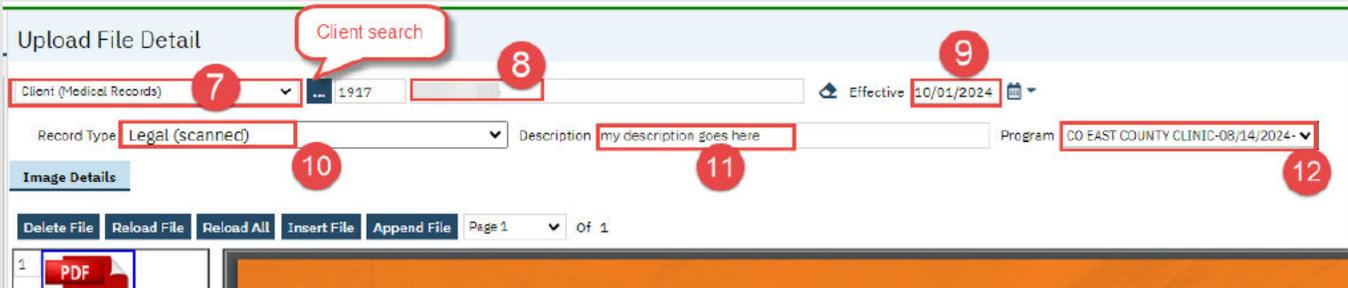


- This will load the image in the center of the screen.



Now, complete the information from the fields at the top of the **Upload File Detail** screen.

- Select **“Client (Medical Records)”** from the dropdown.
- If you didn't have a client record open before scanning (see above), click the **“...”** button to search for the client. Otherwise, the client's name will appear here.
- Enter the **Effective** date.
- Select a **Record Type** from the dropdown.
- Type a **Description** of the document into the free text field.
- Select the correct client **Program** from the dropdown.
- Click **Save** in the upper right corner of the screen.



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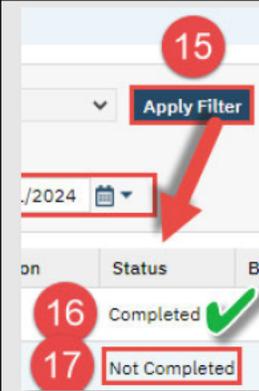
- Use the dropdown filters at the top of the screen to narrow the results by your **name**, **date range to include 8/31 to the present date**, **Show Scanned/Uploaded**, and **All Statuses**.
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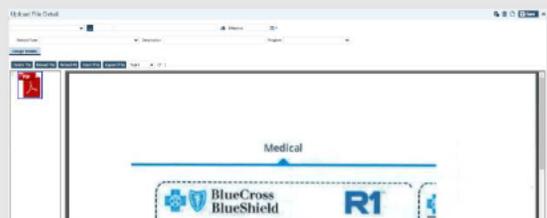
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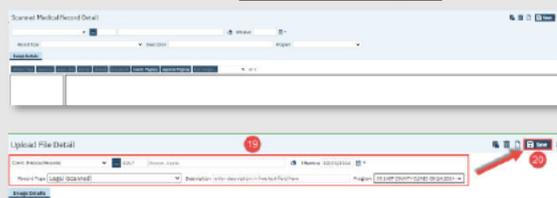
- 19. Enter all the patient and program details using the dropdowns boxes at the top

- 20. Select **Save**

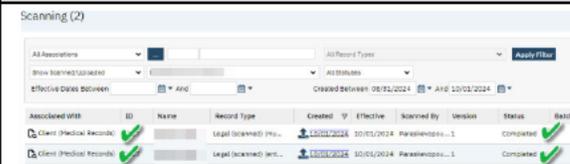
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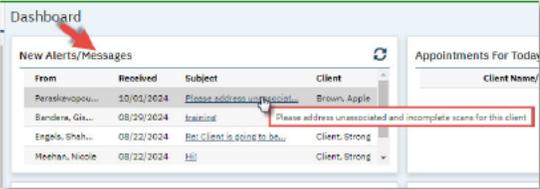
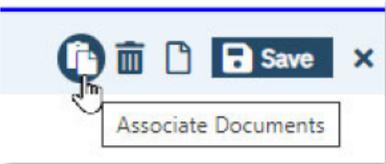


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