LSUHSC-S Imaging Project

Laserfiche

User Services – Clinical Support Computer Services Department

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Logon Process

1. Click the Laserfiche icon located on your desktop

2. Highlight the Laserfiche repository. Click Open.

a. If the repository Laserfiche does not display, click Attach.

   i. Enter sh-laserfiche as the Laserfiche Server

   ii. Click the drop-down arrow and select Laserfiche as the repository

   iii. Click Attach
3. Enter your Laserfiche userid and temporary password. Click OK.

   a. You must change your temporary password upon entering the system the first time. Click OK on the Password Expired screen.

   b. Enter your temporary password and your New Password. Retype your new password. Click OK
i. There are no restrictions on the selected password (i.e.: you may use upper / lower case, numbers / alphanumeric symbols, etc.)
Changing Your Display Columns

4. Select your Image Folder (Phase 2 – Regs/Admits) on the left side of the Folder Selection screen.
   a. Stored images will display on the right side of the screen.

5. If you are logging on a Laserfiche computer for the first time, we recommend that you reformat the column display order.
   a. **Default Column Display** – Name, Type, Pages, OCR’ed Pages, Indexed, Creation Date, Last Modified
   b. **Recommended Column Display** – Name (this is the template name and it must be displayed with each image – default value = Untitled (sequential #).
Medical Rec #, Last Name, First Name, Document Type, Pages, Date of Service, Creation Date, Created By

c. Select View / Choose Columns and select the column names below.
d. Select The Same For All Folders.
   
i. You may have to make the same changes to the search results columns
e. Click OK.

6. Click and drag the column to the recommended location.

7. These settings are stored on the computer.
Scanning in Laserfiche

8. Press the scanner icon to initiate the scanning process. The Laserfiche template page will appear.

9. Documents can be scanned in two different modes: Basic and Standard
   a. All INVISION workstations are setup to scan in Basic Mode

10. Document Name can remain Untitled or can be used to further identify the document type.

11. Default Template name should be Phase 2 - Regs/Admits.
   a. Templates are used to determine which fields are collected during the scanning process.

12. Enter patient’s MR#, Last Name, First Name, Information’s Date of Service and Document Type.
   a. All fields are required.
   b. Data is ‘free’ text – fields will not be edited.
      i. Watch out for typos!!!
   c. Text is case sensitive.
      i. Recommend that you enter all text in UPPER CASE.
   d. Press arrow to select Document Type from drop down list (i.e.: Income Verification)

Basic Mode View (recommended mode)
13. **Standard Mode View** ONLY:

a. The display icons , located in lower left corner of the screen, allow the user to configure their view.

   i. - Show / Hide **Configuration** pane

   ii. - Show / Hide **Revision** pane

   iii. - Show / Hide **Document Text** pane

   iv. - Show / Hide **Task** pane

   v. - Show / Hide **Output** pane

   vi. The following panes are recommended for display:

       1. **Configuration, Revision** and **Task**
vii. The standard mode View can also be configured by selecting **View / Panes**

14. Press the **Scanner** icon to scan your document.

15. The **Scanning to Laserfiche TWAIN** window will display:

![Scanning to Laserfiche TWAIN](image)

16. Place document face down in scanner.

   a. Note the scanner message at bottom of Scanning screen changes from ‘**No Document in Scanner**’ to ‘**Ready for Scan**’.

   b. Regular paper documents (i.e.: proof of residence, etc.)

      i. **Mode = Black & White**

   c. Picture documents (i.e.: driver licenses, etc.)

      i. **Mode = Grayscale**
d. If you are scanning a one sided document, uncheck **Duplex**

e. If you are scanning a two sided document, select **Duplex**

   i. Scanner will automatically scan both sides

f. The **Define** button can be used to identify the document page size (i.e.: business card, etc.)

   i. Recommend that this option remain checked.

g. Select **Scan** to start the scanning process.

h. Select **Done** once the document has been scanned.

i. The scanned image will display in the **Display** area located on the left (Basic Mode) or in the center (Standard Mode)

   i. **Basic Mode Options**

      1. To maximize or minimize the scanned document, press the **right mouse button** and select **Zoom In** or **Zoom Out**.
2. You may select to...

   a. Store your image by pressing the Done icon

   b. Rescan your image by pressing the Rescan icon

   c. Scan a new document for the current patient

   1. Change only pertinent information that is unique for that scan (i.e.: Document Type = Identification)

   d. Advance to next page by pressing the following icons
**ii. Standard Mode Options**

1. You may select to....

2. Store your image by pressing the **Store** icon.

3. Resume your scanning by pressing the **Resume** icon.

4. Rescan your image by pressing the **Rescan** icon.

5. Zoom in/out the image display by pressing the **Zoom** icon.
6. Rotate your image by pressing the **Rotate** icon.

7. Advance to next document by pressing the following icons.

![Next Document](image)

8. Advance to next page by pressing the following icons.

![Next Page](image)

iii. If you scan multiple images within a given session, you may switch between images by pressing the appropriate **Next Document** icon or

1. **Standard Mode Only**…

   a. By selecting the appropriate **Page #** in the **Revision** pane located on the left.

      i. If you select to delete an image before it is stored, select the **page #** and press the **Delete** key.

2. Additional documents may be scanned for a patient by pressing the scanner icon and changing only pertinent information that is unique for that scan (i.e.: Document Type = Identification)

3. **Basic Mode Only**…

   a. To delete an image before it is saved, press the **X** key in the upper right corner of the scan screen.

   b. Answer **No** to the question below.

![Laserfiche Scanning](image)
17. Once all documents have been scanned, press the Store icon or Done icon to store the images to the repository. Click the X in the upper right hand corner of the screen to exit the scan view.

18. All stored images will display on the right side of the Folder selection screen.

19. Images can be sorted by clicking the column field name.

20. Once an image is stored, it can be deleted by MANAGEMENT ONLY.

Retrieving Scanned Images

21. To search and reserve an image, select the Search icon on the Folder selection screen.
22. Any field in the **Phase 2 – Regs/Admits** template can be used to search the image repository (i.e.: MR#, Last Name, First Name, Date of Service, Document Type).

   a. If these fields do not display once the search icon is selected, select the double arrow next to **Customize Search** and select **Fields** and deselect **Text**.

   ![Customize Search]

   b. Keep in mind that you must change templates if you are searching for images that were stored during Phase 1 (this is necessary initially; however, all images will eventually reside under one template).

   i. Phase 1 images are searchable under the **Registration** template.

      1. This template is used to house images that are scanned by Admitting, Outpatient Registration, Hospital Billing, Patient Processing / Financial Counseling and Shared Billing

   ii. All admitting / registration images will be moved to the **Phase2 – Regs/Admits** folder once Laserfiche is implemented in all remaining clinics.

23. All images that meet the search criteria will display on the right.

24. Open the image by double clicking the appropriate filename.

25. The new image will display in a separate window.

   a. If your image has multiple pages, select the appropriate page # to view that page.
Logoff Process

26. To close the image, select File / Close or press ‘X’ in the upper right hand corner.

27. To exit Laserfiche, select File / Exit or press ‘X’ in the upper right hand corner of the main screen.
General Questions / Answers:

1. **What should I scan in Laserfiche?**
   
a. The general rule that should be utilized by all Admitting / Registration clerks is to scan all documents that contains a *patient’s signature* or anything that is currently being Xeroxed and placed in the patient’s folder.

   b. Individual department policies may outline additional documents that clerks should scan.

2. **Will the Phase 1 images remain stored under the patient’s medical record folder?**
   
a. Initially, yes. Once Laserfiche is installed throughout all clinics, all Phase 1 images will be copied to the Phase 2 folder.

3. **Will Laserfiche automatically log me out of the system if the system is idle for so many minutes?**
   
a. Yes.

   b. You will be automatically logged out of the system after 30 minutes of no activity.

4. **Can I access Laserfiche through the internet?**
   
a. Yes

   b. You can access Laserfiche, in VIEW ONLY mode, via the web by clicking on the address below:

      i. [http://sh-laserfiche/weblink7/](http://sh-laserfiche/weblink7/)

5. **Who should I call if I have questions concerning the application?**
   
a. Your friendly users consultants in Clinical Support (5-5470 option 1)

6. **What should I do if my scanner loses connection?**
   
a. Shut down your computer
b. Unplug the scanner from the computer, then plug it back in. It should fit securely, but should not be forced. It will only plug into the computer one way.

c. Unplug the power from the scanner, then plug it back in.

d. Turn the computer back on.

e. If all else fails, call your friendly user consultants in Desktop Support (5-5470, option 2)