



Acquisition Client

Installation and User Guide

Version 6.1



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- Track tickets
- Search and Download Knowledge
- Interact in Upland Forums
- Stay up to date on AccuRoute and/or Upland News

Access the Community by logging in with your company email at:

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- Phone: (978) 327 6800 or (1-888) 303 8098
- E-mail: omtool-support@uplandsoftware.com
- Community: <https://community.uplandsoftware.com/hc/en-us>

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Section I: Installing AccuRoute Acquisition Tool

This section includes:

[Requirements](#) (1-1)

[Accessing the setup files](#) (1-2)

[Installing AccuRoute Acquisition client](#) (1-2)

Requirements

Server requirement

- AccuRoute server v6.1

Hardware and software requirements

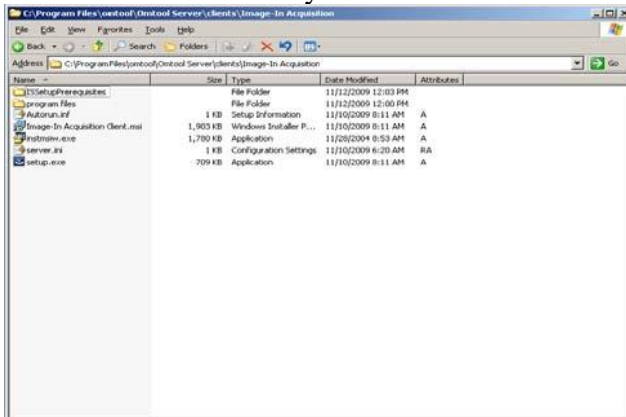
The requirements are as follows:

- Pentium[®] -class processor
- Windows 2008/2003 SP2/Windows 7 (x32 or x64)/ Windows 8 (x32 or x64)
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Acrobat[®] Reader[®] 7.x or higher

Accessing the setup files

The AccuRoute Acquisition setup files are located in the **[ServerInstallFolder]\Clients\AccuRoute Acquisition** directory of the system running the AccuRoute server. If you are installing AccuRoute Acquisition in the same system, simply navigate to this folder to access the setup files.

If you are installing AccuRoute Acquisition in a separate system, ensure that proper access permissions have been set up for you to access the **[ServerInstallFolder]\Clients\AccuRoute Acquisition** directory from the system where you are installing AccuRoute Acquisition. You can also copy the setup files to a shared network directory.



Installing AccuRoute Acquisition client

To install AccuRoute Acquisition:

1. Log on to the client using an account that belongs to the Administrators group and navigate to the directory containing the setup files.

2. Click **SETUP.EXE**. The InstallShield wizard configures your system and shows the **Welcome** message.

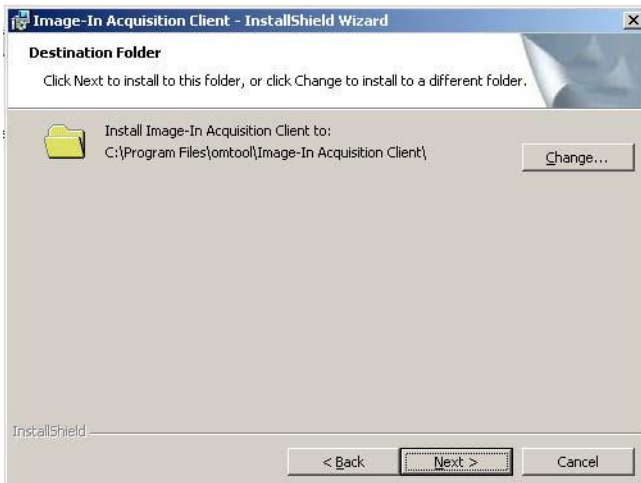


3. Click **NEXT**. The setup shows the license agreement. Read the agreement carefully and if you agree to the terms, click **YES**.

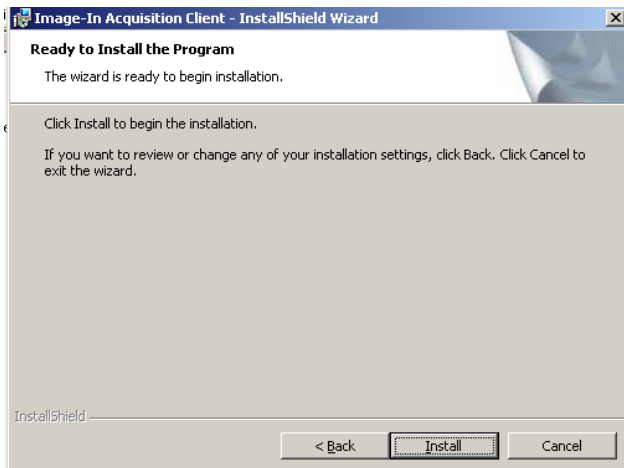


4. Click **NEXT**.

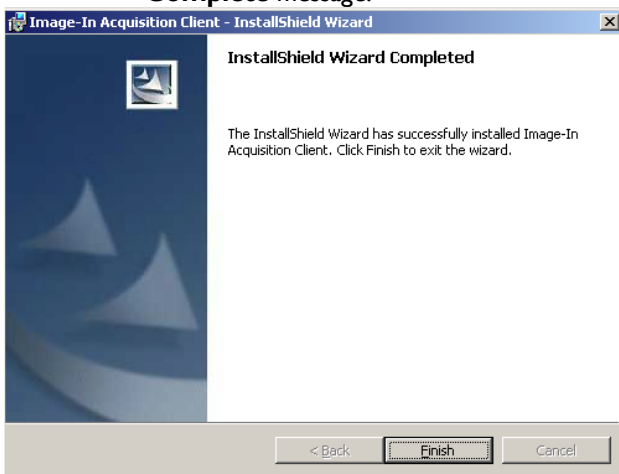
The **Destination Folder** page opens. The default destination is **C:\Program Files (x86)\Upland AccuRoute\Acquisition Client**.



5. Click **NEXT** if you want the default destination. The **Ready to Install the Program** page opens. If you want to install in a non-default location, click **BROWSE** and then select the desired location and then click **NEXT**.



6. Click **INSTALL** to begin the installation. When installation is complete, you see the **InstallShield Wizard Complete** message.



7. Click **FINISH** to close the wizard.

Section 2: AccuRoute Acquisition Desktop

This section includes:

[Becoming familiar with the user desktop \(2-1\)](#)

[User Interface \(2-1\)](#)

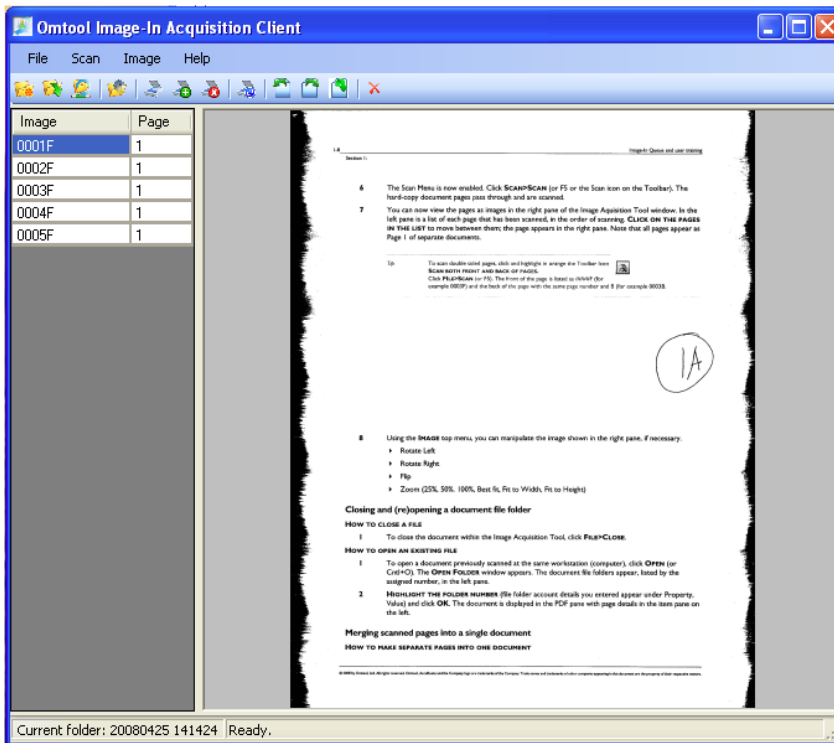
[Top Menu Bar \(2-2\)](#)

[Tool Bar Icons \(in order, left to right\) \(2-4\)](#)

[Image/page number pane and PDF viewer pane \(2-4\)](#)

Becoming familiar with the user desktop

User Interface



The AccuRoute Acquisition client user interface is composed of a top menu bar, a tool bar, an image/page number pane, a PDF viewer pane and a status bar with the folder number.

Often there are several ways to access common commands, which are all described under the relevant heading. Keyboard shortcut keys, when applicable, are given in parenthesis.

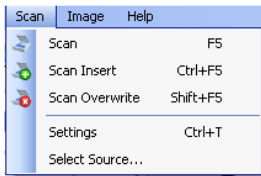
Top Menu Bar

File menu

| File | Scan | Image | Help |
|------------|--------|-------|------|
| New | Ctrl+N | | |
| Rescan | Ctrl+R | | |
| Open | Ctrl+O | | |
| Submit | Ctrl+S | | |
| Close | | | |
| Properties | F2 | | |
| Options... | F3 | | |
| Delete | | | |
| Exit | Alt+F4 | | |

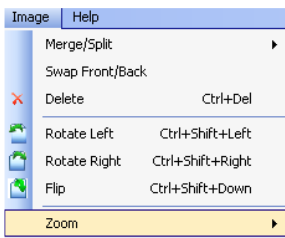
- New (Ctrl+N) opens the Properties window and enables the Scan command
- Rescan (Ctrl+R)
- Open (Ctrl+O) an existing document
- Submit (Ctrl+S) the document to AQ
- Close the current document
- Properties (F2) displays the index window with Folder number, Medical record, and Account number.
- Options (F3) Note: This diagnostic should be enabled only at the request of tech support.
- Delete removes the folder and all images in it.
- Exit (Alt+F4) the application

Scan menu



- Scan new images to the end of a folder.
- Scan Insert scans images and puts them before the selected image.
- Scan Overwrite scans new images and overwrites starting at the current image. (Also see [Substituting a page in a document](#) on 3-8.)
- Settings (or Cntl+T) for the scanner allows the choice of:
 - Color, Black & White or Grayscale, which may help with the quality of some problem documents
 - resolution in DPI
 - Duplex
 - Show scanner UI
- Select Source allows you to choose which scanner to use.

Image Menu



- Merge/Split collects pages into a single document or subtracts them from an existing document. (Also see [Merging scanned pages into a single document](#) on 3-4.) and (Also see [Splitting double-sided merged pages into individual pages](#) on 3-7.)
- Swap Front/Back
- Delete (Cntl+Del) deletes the image selected.
- Rotate Left (Cntl+Shift+Left)
- Rotate Right (Cntl+Shift+Right)
- Flip (Cntl+Shift+Down)
- Zoom (25%, 50%, 100%, Best fit, Fit to Width, Fit to Height)

Help

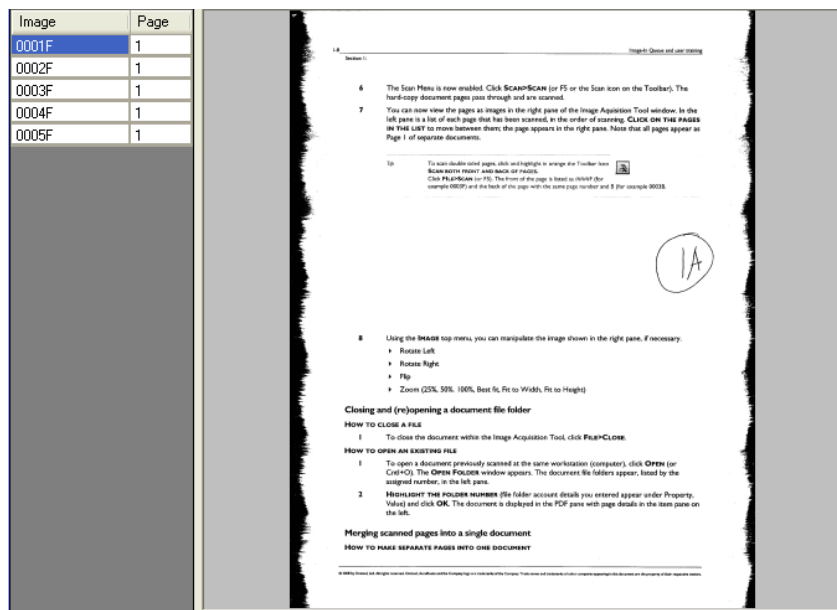
(TBD)

Tool Bar Icons (in order, left to right)



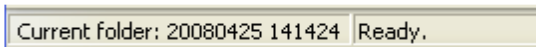
- Create a new folder (Ctrl+N) (Also see [Scanning a document](#) on 3-2.)
- Open a folder previously scanned on this workstation (Ctrl+O) (Also see [Closing and \(re\)opening a document file folder](#) on 3-4.)
- Submit folder to AccuRoute Queue (Ctrl+S) (Also see [Submitting a document to AQ](#) on 3-9.)
- Display or modify folder properties (F2)
- Scan (F5) enters the image of the page into AccuRoute (Also see [Scanning a document](#) on 3-2.)
- Scan images and place them before the selected image (Ctrl+F5) (Also see [Substituting a page in a document](#) on 3-8.)
- Scan new images, overwriting starting at the current image (Shift+F5) (Also see [Substituting a page in a document](#) on 3-8.)
- Scan both front and back of pages (Also see [Scanning a document](#) on 3-2.)
- Rotate the image 90 degrees counter-clockwise (Click+Shift+Left Arrow)
- Rotate the image 90 degrees clockwise (Click+Shift+Right Arrow)
- Flip the current image (Click+Shift+DownArrow)
- Delete the current image

Image/page number pane and PDF viewer pane



The image and page number pane lists the pages that have been scanned and gives information about their pagination in the document. The highlighted page can be viewed and manipulated in the PDF viewer pane.

Status bar



The status bar shows the folder number and current action.

Section 3: Working with AA documents

This section shows you how to perform the document processing functions available in the AccuRoute Acquisition software portion of the Upland AccuRoute Healthcare Suite.

- Working with documents: [Scanning a document](#) (3-2)
- [Closing and \(re\)opening a document file folder](#) (3-4)
- [Merging scanned pages into a single document](#) (3-4)
- [Splitting merged pages into individual pages](#) (3-5)
- [Merging double-sided pages](#) (3-5)
- [Splitting double-sided merged pages into individual pages](#) (3-7)
- [Deleting a page from a document](#) (3-7)
- [Deleting a file \(or document\)](#) (3-8)
- [Adding a page to a document](#) (3-8)
- [Substituting a page in a document](#) (3-8)
- [Submitting a document to AQ](#) (3-9)

Working with documents in AA

Scanning a document

To scan a document for use in AQ by using the AccuRoute Acquisition Tool software, use the following steps:

1. Open the AccuRoute Acquisition Tool software by clicking on the desktop **UPLAND ACCURROUTE ACQUISITION TOOL ICON** or in **START>ALL PROGRAMS>UPLANDACCURROUTE>ACCURROUTE ACQUISITION CLIENT**.
2. Place the document pages to be scanned in the scanner.
3. Click **FILE>NEW** in the top menu of the Image Acquisition Tool (or Cntl+N or use the Icon on the Toolbar).



4. Enter the account information:
 - Folder Name (generated by AQ)
 - Medical Record
 - Account Number

Tip If your document includes a barcode, this can be scanned along with the document page and therefore, you may not have to enter the Medical Record and Account Number information manually at this time

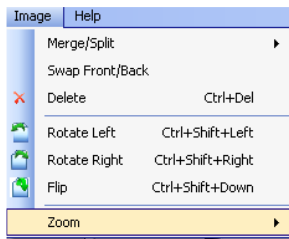
5. Click **OK**.
6. The Scan Menu is now enabled. Click **SCAN>SCAN** (or F5 or the Scan icon on the Toolbar). The Cancel Scanning? window displays. The hard-copy document pages pass through and are scanned. The Cancel Scanning? window closes.
7. You can now view the pages as images in the right pane of the Image Acquisition Tool window. In the left pane is a list of each page that has been scanned, in the order of scanning. **CLICK ON THE PAGES IN THE LIST** to move between them; the page displays in the right pane.

Note All pages appear as Page 1 of separate documents. (Also see [Merging scanned pages into a single document](#) on 3-4.)

Tip To scan double sided pages, click and highlight in orange the Toolbar Icon **SCAN BOTH FRONT AND BACK OF PAGES**. Click **FILE>SCAN** (or F5). The front of the page is listed as #####F (for example 0003F) and the back of the page with the same page number and B (for example 0003B). If you scan the page incorrectly, you can switch the sides, making the back (B) of the double-sided page into the front (F), within the II-A software and without rescanning. Highlight one side (F or B) of the double-sided document page. Click **Image>SwapFront/Back**.



8. Using the **IMAGE** top menu, you can manipulate the image shown in the right pane, if necessary.



- Rotate Left (or Cntl+Shift+Left Arrow)
- Rotate Right (or Cntl+Shift+Right Arrow)
- Flip 180% (or Cntl+Shift+Down Arrow)
- Zoom (25%, 50%, 100%, Best fit, Fit to Width, Fit to Height)

Closing and (re)opening a document file folder

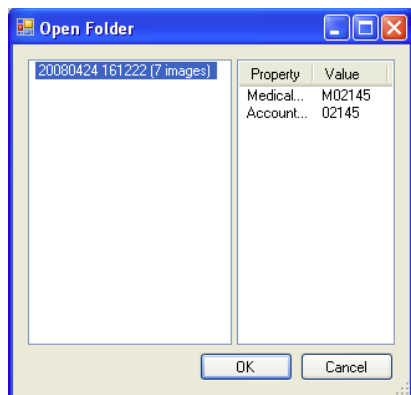
To close a file:

1. To close the document within the Image Acquisition Tool, click **FILE>CLOSE**.

The document remains within the Image Acquisition software, until it is opened again and submitted to AccuRoute Queue.

To open an existing file, use the following steps:

1. To open a document previously scanned at the same workstation (computer), click **FILE>OPEN** (or Cntl+O). The **OPEN FOLDER** window displays. The document file folders appear, listed by the assigned number, in the left pane.



2. **HIGHLIGHT THE FOLDER NUMBER** (File folder account details you entered appear under Property and Value.) and click **OK**. The document is displayed in the PDF pane with page details in the item pane on the left.

Merging scanned pages into a single document

To make individual one-sided pages into one document, use the following steps:

Open the document file folder, if you have closed it for any reason, as in the previous step.

In order to make the individual scanned pages into one document, you have to Merge each page into the document. If the document pages have been scanned in the correct order, it is probably most logical to merge the pages in consecutive order. If, for example, the first page scanned (0001F) is the accepted first page of the document, continue in this manner.

1. In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the second page scanned) that is to become Page 2.

| Image | Page |
|-------|------|
| 0001F | 1 |
| 0002F | 1 |
| 0003F | 1 |

2. Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+M). The page that was highlighted displays as Page 2 to the page shown before it in the list.

| Image | Page |
|-------|------|
| 0001F | 1 |
| 0002F | 2 |
| 0003F | 1 |

3. Highlight the page that is to be next in order and repeat Step 2, until all the relevant pages are merged into one document.

Note Any page can be merged with the document previous to it in the list, in any order.

Splitting merged pages into individual pages

You can reverse the process of making the individual scanned pages into one document by splitting any page away from the document.

To separate pages from a document, use the following steps:

1. In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the second page scanned) that is to be separated from the document.
2. Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+Shift+M). The page that was highlighted is separated from the page shown before it in the list.
3. Repeat Step 1 and 2, until all the necessary pages are separated from the document.

Note Any page can be split from the page, and document, previous to it in the list, in any order. If there are pages following the split page, they are renumbered sequentially, with the split page as Page 1.

Merging double-sided pages

To make individual double-sided pages into one document, use the following steps: Open the document file folder, if you have closed it for any reason, as in the previous step.

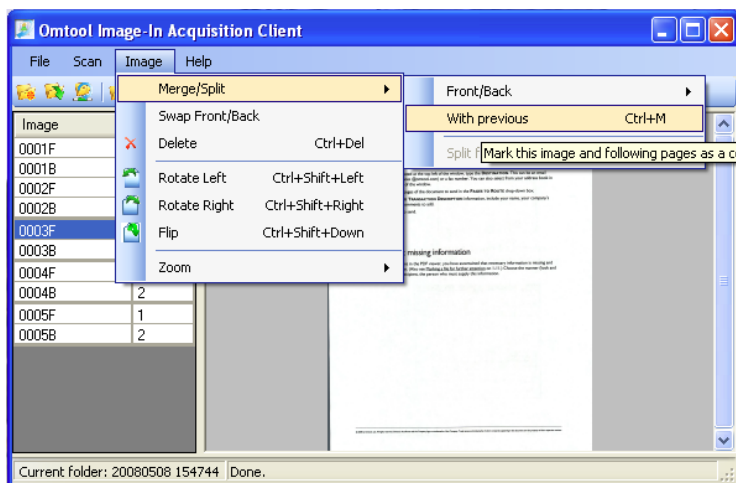
In order to make the double-sided scanned pages into one document, you have to Merge each double-sided page into the document. If the document pages have been scanned in the correct order, it is probably most logical to merge the pages in consecutive order. If, for example, the first page scanned (0001F and 0001B) is the accepted first page of the document, continue in this manner.

1. There are 5 double-sided pages shown in the figure below. In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the front of the second page scanned) that is to become the front of Page 2 of the document.

| Image | Page |
|-------|------|
| 0001F | 1 |
| 0001B | 2 |
| 0002F | 1 |
| 0002B | 2 |
| 0003F | 1 |
| 0003B | 2 |
| 0004F | 1 |
| 0004B | 2 |
| 0005F | 1 |
| 0005B | 2 |

2. Click **IMAGE> MERGE/SPLIT>WITH PREVIOUS** (Cntl+M). The page that was highlighted displays as Page 3 (Front) and Page 4 (Back) to the double-sided page shown before it, Page 1 (Front) and Page 2 (Back), in the list.

Note The double sided pages that are as yet not merged into the document are numbered 0005F Page 1 and 0005B Page 2 for example.



3. Highlight the front of the page that is to be next in order and repeat Step 2, until all the relevant pages are merged into one document.

| Image | Page |
|-------|------|
| 0001F | 1 |
| 0001B | 2 |
| 0002F | 3 |
| 0002B | 4 |
| 0003F | 5 |
| 0003B | 6 |
| 0004F | 7 |
| 0004B | 8 |
| 0005F | 9 |
| 0005B | 10 |

Splitting double-sided merged pages into individual pages

You can reverse the process of making the individual double-sided scanned pages into one document by splitting any double-sided page away from the document.

To separate pages from a document, use the following steps:

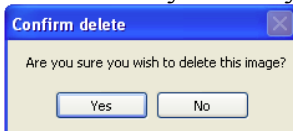
1. In the page number pane, **CLICK AND HIGHLIGHT THE PAGE** (for this example 0002F, the front of the second page scanned) that is to be separated from the document.
2. Click **IMAGE>MERGE/SPLIT>WITH PREVIOUS** (Cntl+Shift+M). The page that was highlighted is separated from the page shown before it in the list.
3. Repeat Step 1 and 2, until all the necessary pages are separated from the document.

Note Any page can be split from the page, and document, previous to it in the list, in any order. If there are pages following the split page, they are renumbered sequentially, with the double-sided split page as Page 1 and Page 2.

Deleting a page from a document

To delete a page from a document, use the following steps:

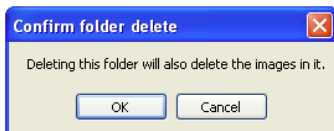
1. **CLICK AND HIGHLIGHT THE PAGE** of the document in the Page view pane.
2. Click **IMAGE>DELETE** (Cntl+Del). The Confirm Delete window displays with the warning message “Are you sure you wish to delete this image?”. Click **YES** to confirm.



Deleting a file (or document)

To delete a document file, use the following steps:

1. **CLICK AND HIGHLIGHT ANY PAGE** of the document in the Page view pane.
2. Click **FILE>DELETE**. The Confirm Folder Delete window displays with the warning message that “Deleting this file will also delete the images in it.”. Click **OK** to confirm.



Adding a page to a document

To add a page to a document, use the following steps:

1. Place a document in the scanner.
2. Highlight a page. Note that the inserted pages are placed **before** the highlighted page.

3. Click **SCAN>SCAN INSERT** (Cntl+F5 or the “Scan Images and place them before the selected image” Icon on the Toolbar). The Cancel scanning window displays briefly, and closes. The document pages are scanned.
The newly-scanned pages appear in the page number pane list **after** the page you highlighted. The pages are renumbered from 0001F.

Substituting a page in a document

To substitute one page for another in a document, use the following steps:

1. Place a document in the scanner.
2. Highlight a page. Note that the inserted page replaces the highlighted page.
3. Click **SCAN>SCAN OVERWRITE** (Shift+F5 or the “Scan new images, overwriting starting at the current page” Icon on the Toolbar). The Cancel scanning window displays briefly, and disappears. The document pages are scanned.

The newly-scanned page displays in the page number pane list **in place of** the page you highlighted.

Note If multiple pages are scanned, the replacement begins with the highlighted page and adds the rest of the newly-scanned pages into the list after that new page.

Submitting a document to AQ

1. To send the scanned document to AccuRoute Queue for processing, use the following steps:
2. Click **FILE>SUBMIT**
3. The **ACCUROUTE ACQUISITION CLIENT** window displays informing you that the document folder has been submitted.
4. Click **OK**.
5. The document is now visible in AQ, in the New folder in the tree of the Item View Pane.

Important As the document is submitted to AQ, a routing sheet for the document is created. This routing sheet is used to track the document in the AccuRoute Acquisition tool and in AQ.

Re-scanning a document

Your document was scanned into AccuRoute Queue. You noticed missing information and flagged the document. The document was then sent to the person who could supply the information and now you have the piece of information needed on updated hard-copy document page.

In order to add that information to the electronic file, rescan the document along with the Routing Sheet that was generated for it.

To rescan an updated page of a document, use the following steps:

1. Place the Routing Sheet and the updated document page in the scanner.
2. Click **FILE>RESCAN** (or Cntl+R)
3. Click **SCAN>SCAN**.
4. The document pages feed through the scanner. They can be viewed in AccuRoute.
5. Click **FILE>SUBMIT**.
6. The **ACCUROUTE ACQUISITION CLIENT** window displays informing you that the document folder has been submitted.
7. Click **OK**.
8. The document is now visible in AQ, in the Rescan folder in the tree of the Item View Pane. (See the AccuRoute Queue end user guide (or the appropriate user guide for another compatible AccuRoute product) for instructions on how to complete processing the document.

Section 4: Quick Start Tutorial #1

This section includes:

An example of a typical workflow process with a simple document.

This document uses 2 components of the Upland AccuRoute Healthcare Suite, which work with one another to help you scan, process and file your documents:

- AccuRoute Acquisition tool
- AccuRoute Queue (AQ)

A Simple Workflow

This sample workflow demonstrates how to work with a document that is scanned, processed and filed.

Quick Start Tutorial #1

This tutorial covers:

- Scanning a document into AQ to view it
- Printing the document
- Sending the document to a recipient
- Saving the document to your own computer
- Filing the document in the database and moving to processed folder

Scan and View

You use your scanner to scan hard-copy documents into the system, using the Upland AccuRoute Acquisition Tool software. The electronic document is sent to AccuRoute Queue (AQ) where it displays in a numbered file folder. Notice that the file folder has content, indicated by (1). You can view the document image by clicking on its folder, which displays under New Items.

Figure 4-A: Scan

Open the Upland AccuRoute Acquisition Tool client program.

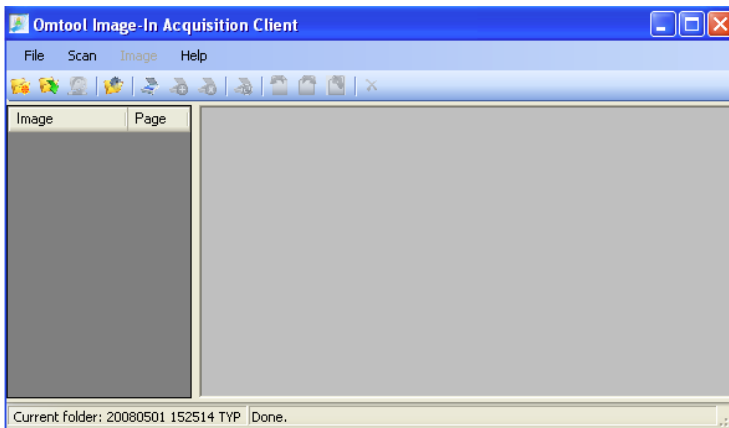


Figure 4-B: New Folder

Create a new numbered file folder.

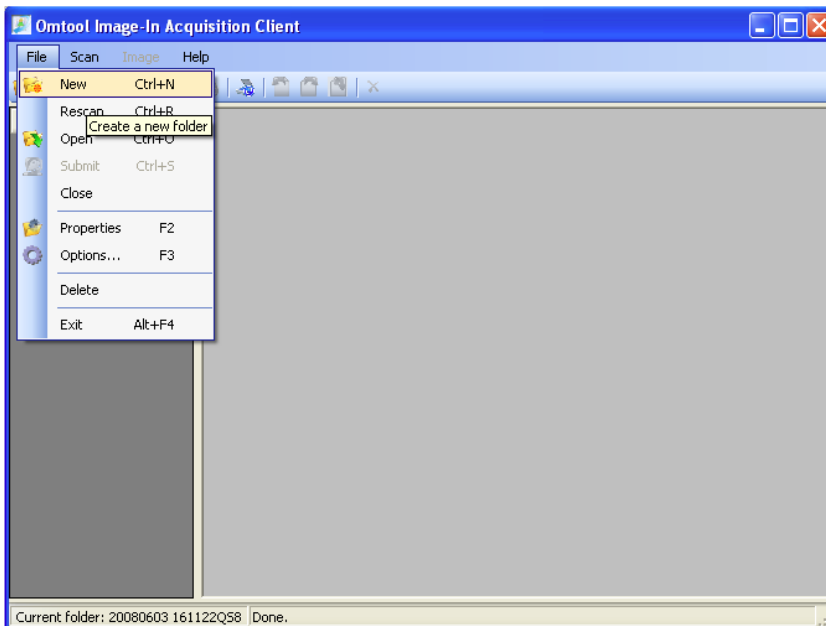


Figure 4-C: New folder

A folder number is automatically generated. Type in the Medical Record and Account Number. (For this example, the file number given ends in Q51, which displays later in AccuRoute Queue to help follow the sample process.)

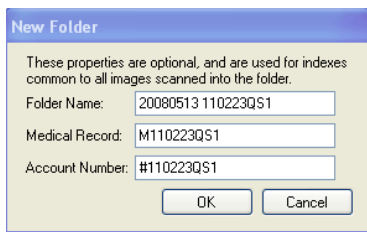


Figure 4-D: Scan

Put all the pages of the document into the scanner. Click **Scan>Scan**. The example here is a 5 page document.

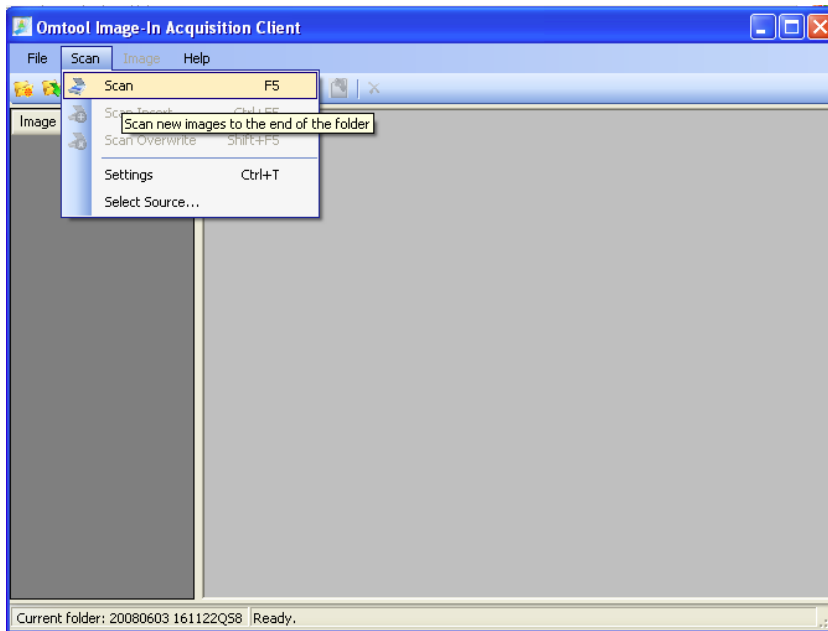


Figure 4-E: Scanning

The AccuRoute Acquisition Tool software scans the document.

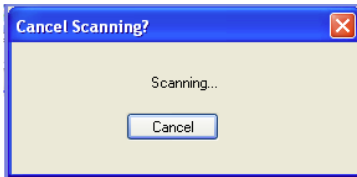


Figure 4-F: View

The pages are all visible in the Viewer, in the order in which they were scanned. Click on each page number on the left to see the image in the right pane. Notice that each of the 5 one-sided pages is separate, indicated by the "1" next to each page. The "F" indicates that a page is the front of the hard copy document page.

Tip The AccuRoute Acquisition Tool does scan double-sided pages as well. Click the Double-Sided icon on the Toolbar before following the procedure above. The back side is indicated by a "B".

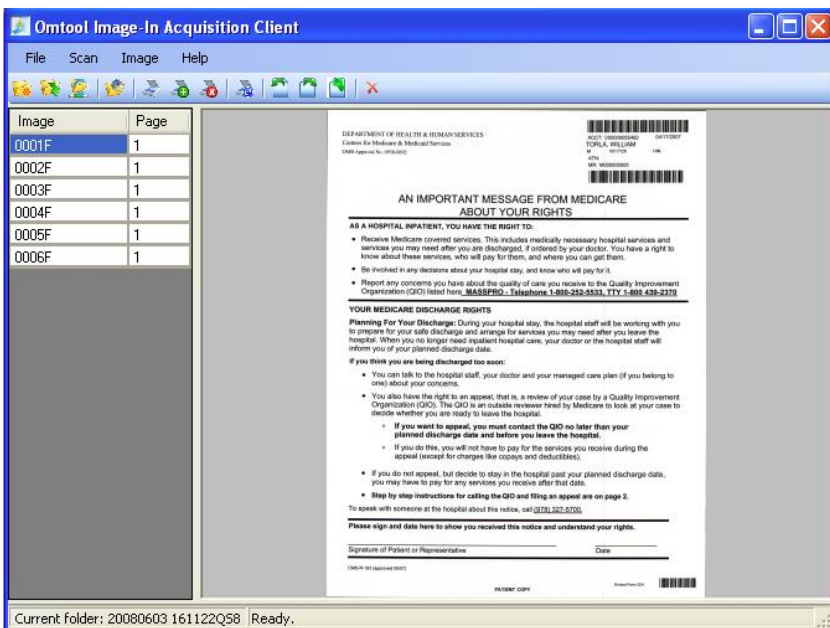


Figure 4-G: Merge

Merge the second page with the first, to begin combining the single pages into one document. Highlight the second page.

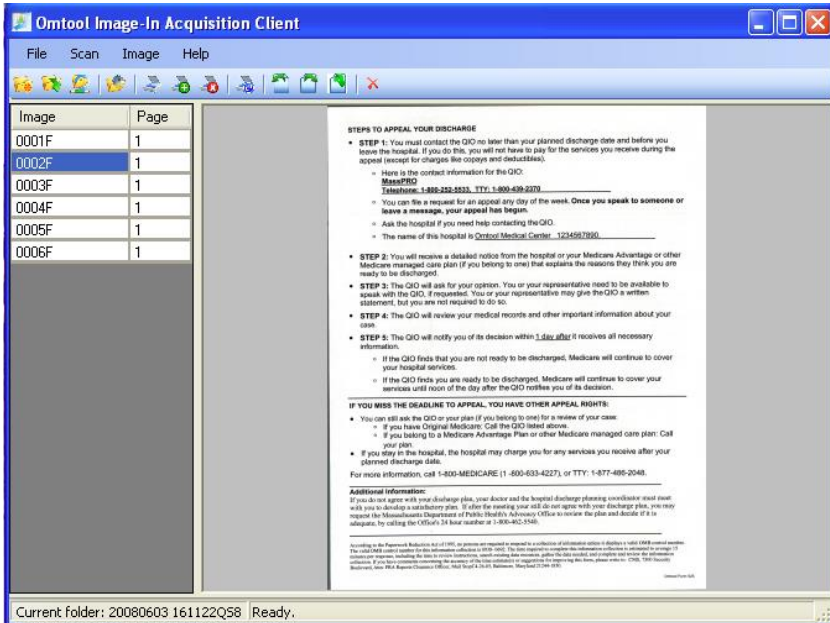


Figure 4-H: Merge Click Image>Merge/Split>With previous.

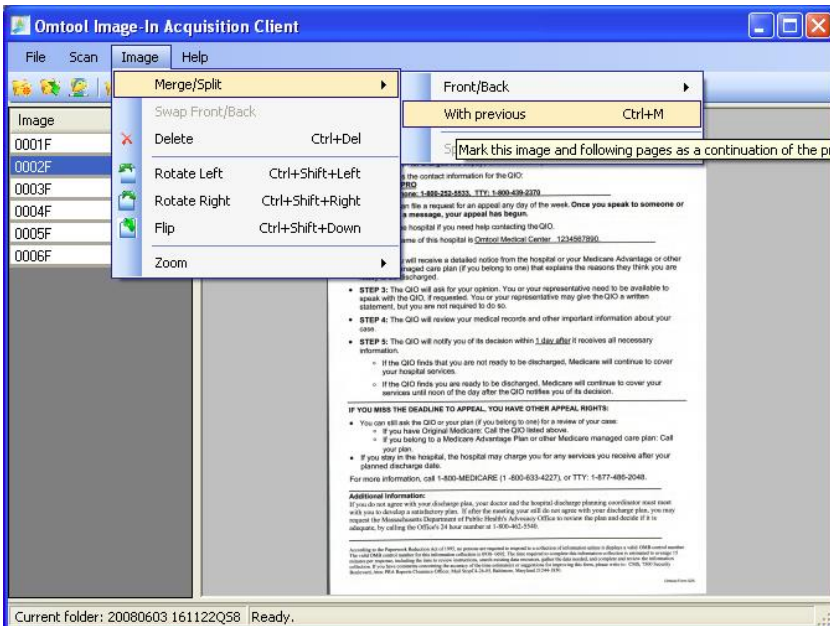


Figure 4-I: Merge

The second page is now part of one document with the first page, as indicated by the Page 2.

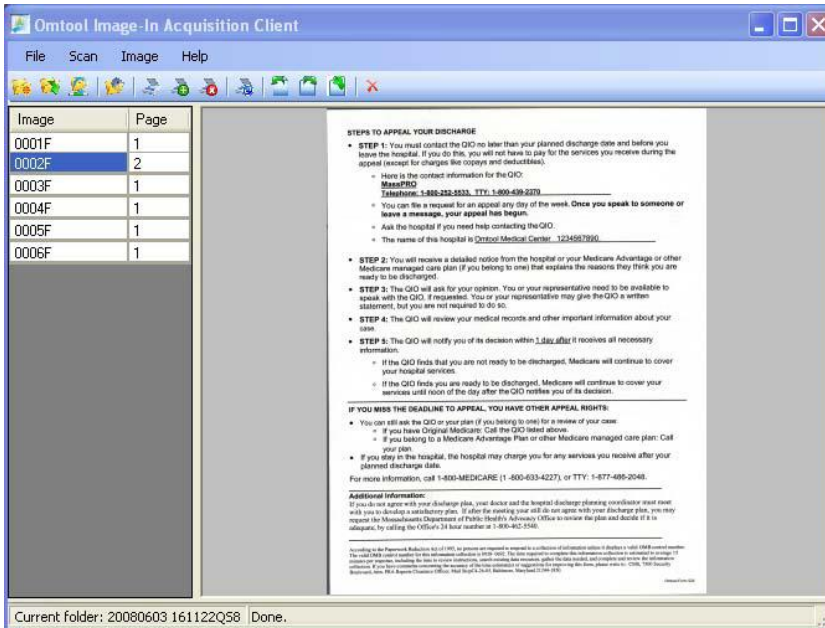


Figure 4-J: Merge

Repeat the process for the remaining single pages, until they are all merged into one document, as indicated by the page numbers 1 through 6.

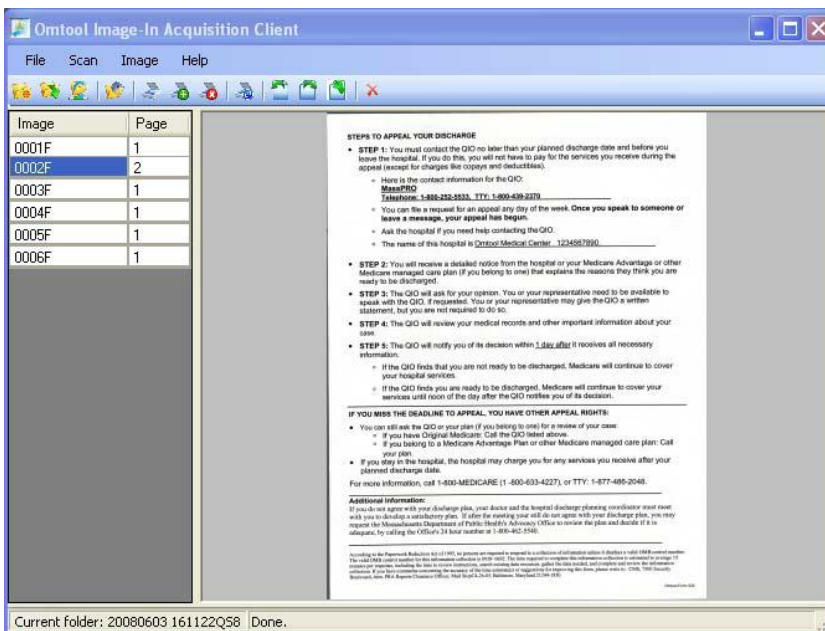


Figure 4-K: Submit Click **File>Submit** to send the document folder to AccuRoute Queue for processing.

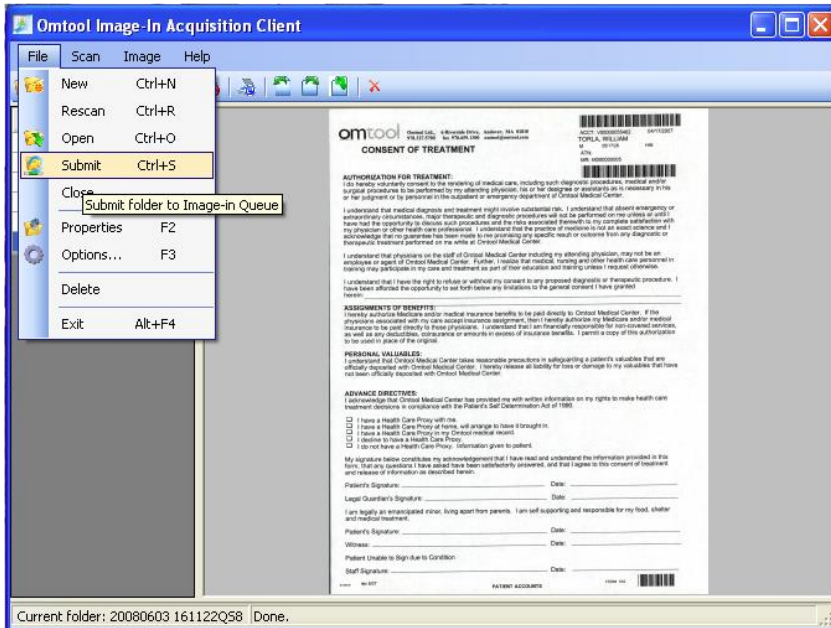


Figure 4-L: Submit

The AccuRoute Acquisition software confirms the file folder has been sent to AQ.



Figure 4-M: View in AQ

In the AccuRoute Queue software, the file displays under New Items (file name ending in QS given previously in the AccuRoute Acquisition tool). Notice the (1) next to the file number, indicating where the file currently is.

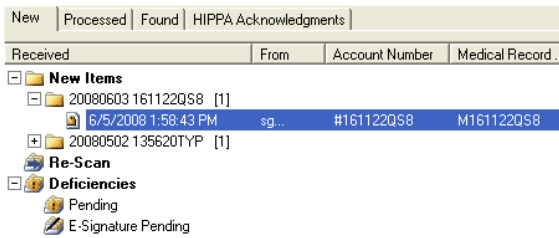
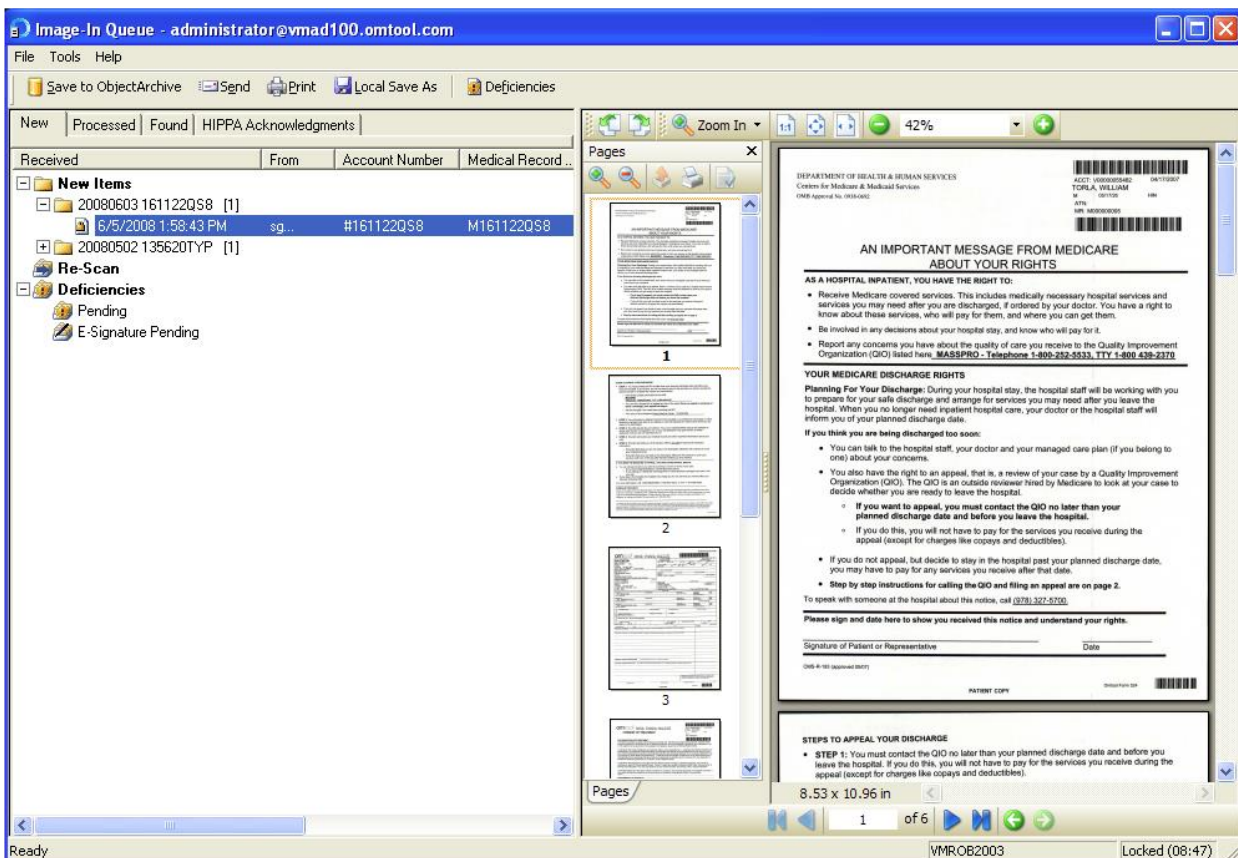


Figure 4-N: View

Click on the document in the Item View pane to view it in the PDF viewer.



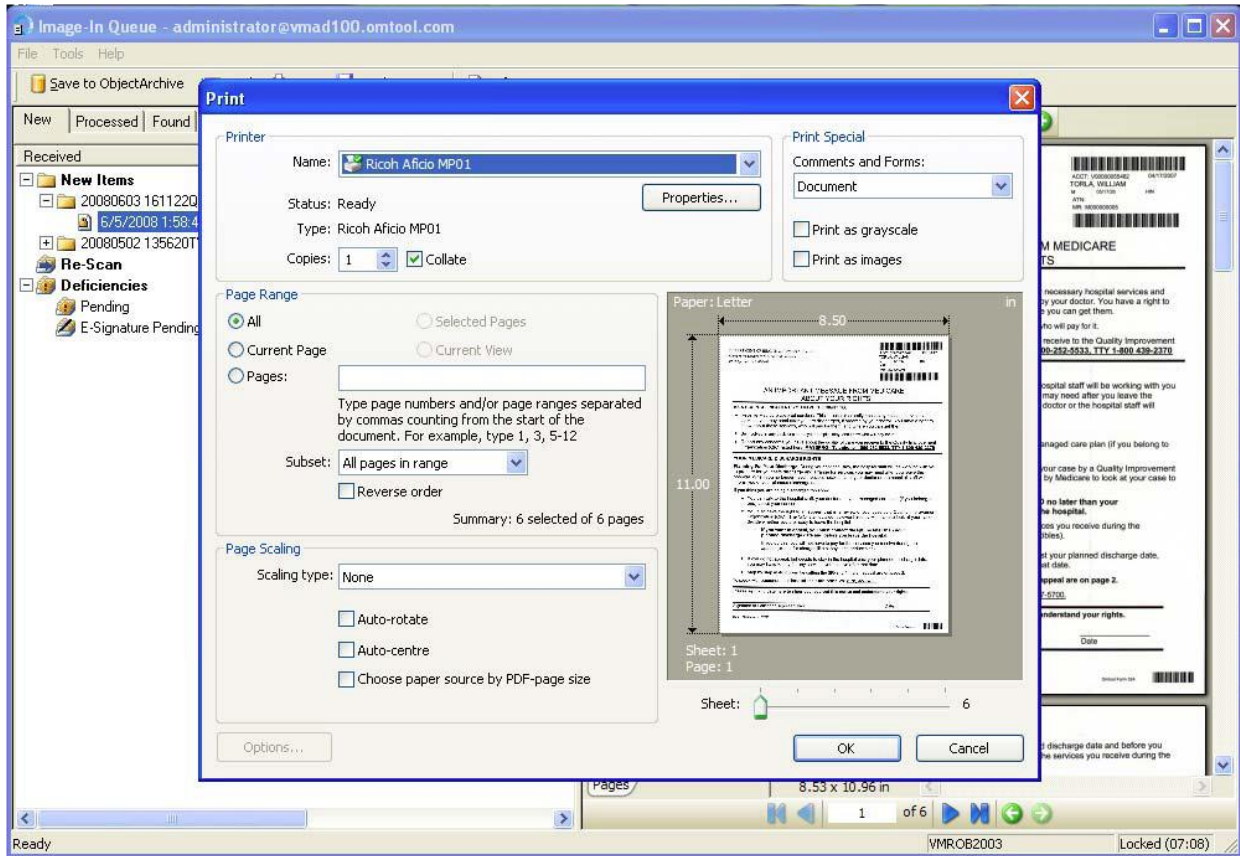
At this point, you can send the whole document to a recipient, who may choose to print it, save the document on your computer or save it to the database and the Processed area.

Print

You or the recipient may need to print the document.

Figure 4-O: Print the Page

Highlight the page and print it. Click on the **PRINTER** icon (or click File>Print or Cnt+P). Check settings. Click **OK**.



Send to Recipient

If there is another person who should view the document or give feedback, send the document to the recipient(s)

Figure 4-P: Send the document

Click the **SEND** icon (or File>Send or Cntl+E). The **ROUTE SELECTED ITEM** window displays. Type a fax number or E-mail address into the box and click add (or use your company address book). The **ROUTE** button enables. Fill out the relevant information at the bottom of the window, Click **ROUTE**.

Route Selected Item

Show names for the: All Addresses

Type destination or select from list: 781 345 6789 Add

Name

>>

<<

Route to: Destination 617 845 4567

Options

Pages to route: All Pages

Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12.

Routing Transaction Description

Name:

Company:

Comments:

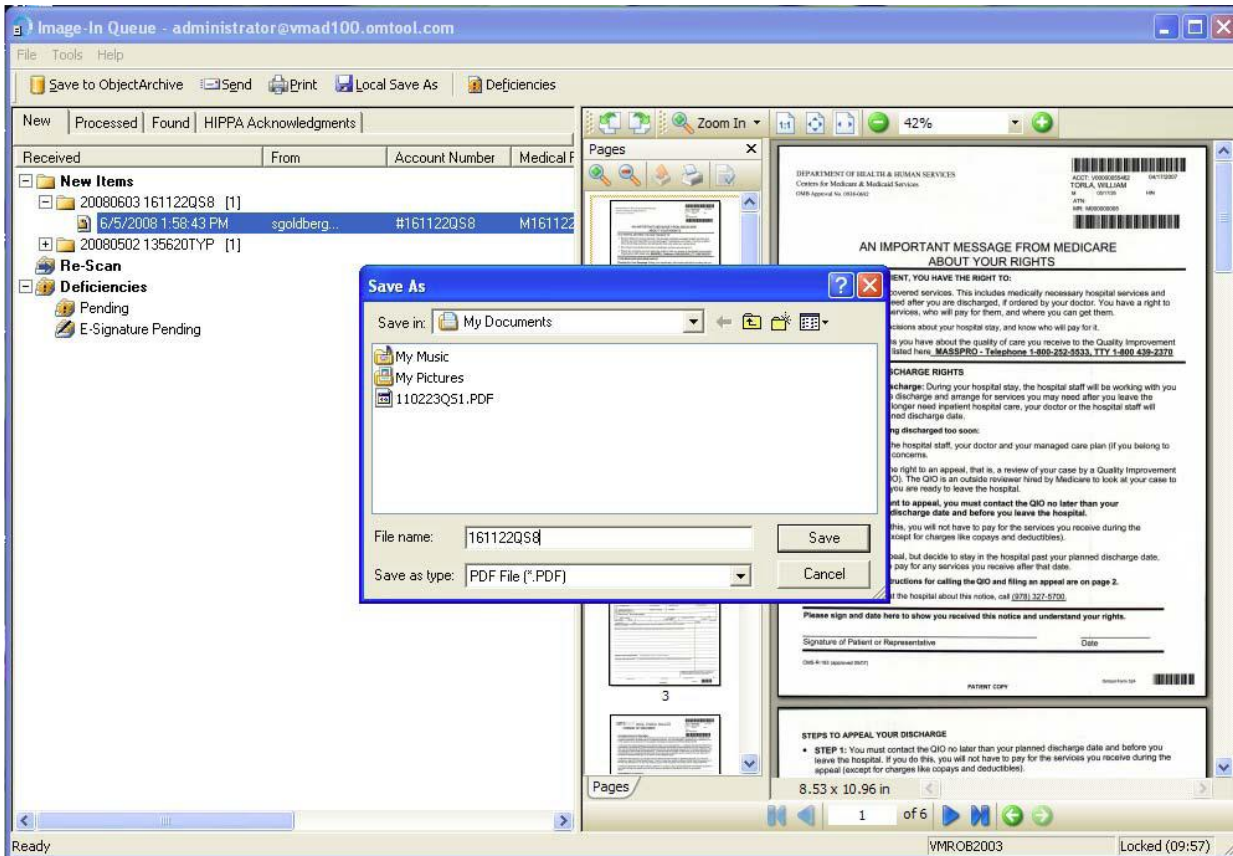
Route Cancel

Save to Your Computer

If you need to keep a copy of the document file, save it to the local hard drive of your computer.

Figure 4-Q: Save to your computer

Click the **LOCAL SAVE AS** icon (or File>Local Save As or Cntl+L). The **SAVE AS** window displays. If necessary, navigate to the location where you wish to save the file. Type a **FILE NAME** into the box and click **SAVE**. The file is saved to your computer.



Save to Database and Move to Processed

Highlight the folder. Save the folder to the database. The folder is no longer displayed in the AQ file folder tree.

Figure 4-R: Save document in database

Click the **SAVE TO...** icon (Object Archive, which is usually your database) or click File > Save to... or Cntl+S. The **PROFILE INTO...** window displays, prompting you to select a form to use for filing purposes. (The information on it can later be used to help search for the document in the database when necessary.)

Figure 4-S: Save document in database

The **PROFILE INTO....** window displays with the account and medical record numbers you typed previously. Fill in the other information required. Click **OK**.

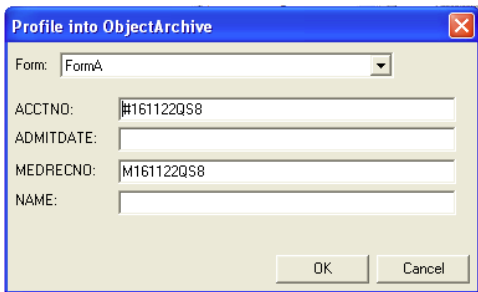


Figure 4-T: Save document in database

The document is saved to the database, where it can be found by doing a search. The file folder displayed under New Items has (0), indicating that the document no longer resides there. (This folder eventually does not display., although there may be some lag time.)

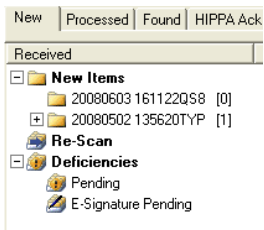


Figure 4-U: Save document in database

The file displays in the list under the **PROCESSED** tab.

| New | Processed | Found | HIPPA Acknowledgments |
|----------------------|-----------|----------------------|-----------------------|
| Received | From | Routed | |
| 4/28/2008 2:46:22 PM | sgold... | 5/1/2008 3:19:42 PM | |
| 4/11/2008 4:11:48 PM | admini... | 5/1/2008 3:19:15 PM | |
| 4/21/2008 3:44:42 PM | admini... | 5/13/2008 3:31:40 PM | |
| 6/5/2008 1:58:43 PM | sgold... | 6/5/2008 5:16:39 PM | |
| 5/1/2008 5:37:09 PM | sgold... | 5/1/2008 6:27:17 PM | |
| 4/28/2008 2:46:22 PM | sgold... | 5/13/2008 2:31:27 PM | |
| 4/21/2008 3:44:42 PM | admini... | 5/13/2008 3:25:18 PM | |
| 4/11/2008 4:13:04 PM | admini... | 5/1/2008 2:54:54 PM | |
| 4/11/2008 2:30:58 PM | admini... | | |
| 4/11/2008 4:13:23 PM | admini... | 5/1/2008 3:18:53 PM | |
| 4/11/2008 2:37:15 PM | admini... | 4/11/2008 6:44:04 PM | |
| 4/11/2008 2:39:09 PM | admini... | 5/1/2008 3:18:35 PM | |
| 5/13/2008 1:20:05 PM | sgold... | 5/13/2008 6:00:01 PM | |
| 5/1/2008 6:05:15 PM | admini... | | |
| 4/18/2008 5:38:14 PM | admini... | 5/2/2008 3:46:31 PM | |
| 4/30/2008 3:08:49 PM | admini... | | |
| 4/23/2008 2:15:27 PM | admini... | | |
| 4/18/2008 5:38:14 PM | admini... | 5/1/2008 3:20:14 PM | |
| 5/1/2008 12:49:59 PM | sgold... | 5/1/2008 2:25:05 PM | |
| 5/5/2008 12:10:52 PM | sgold... | 5/5/2008 3:20:09 PM | |
| 6/5/2008 11:58:10 AM | admini... | 6/5/2008 4:51:06 PM | |
| 4/18/2008 6:16:35 PM | admini... | 5/1/2008 3:15:47 PM | |
| 5/1/2008 2:00:03 PM | admini... | | |
| 6/5/2008 11:58:10 AM | admini... | 6/5/2008 4:51:34 PM | |
| 4/21/2008 3:44:41 PM | admini... | 5/13/2008 3:32:21 PM | |
| 4/11/2008 4:11:08 PM | admini... | 5/1/2008 3:17:22 PM | |
| 5/5/2008 2:34:40 PM | admini... | | |
| 6/5/2008 11:58:10 AM | admini... | 6/5/2008 4:52:11 PM | |
| 4/28/2008 2:46:22 PM | sgold... | 5/1/2008 2:28:33 PM | |
| 4/21/2008 3:44:42 PM | admini... | 5/1/2008 2:55:32 PM | |

Section 5: Quick Start Tutorial #2

This section includes:

An example of a typical workflow process with a document missing essential information.

This document uses 2 components of the Upland AccuRoute Healthcare Suite:, which work with one another to help you scan, process and file your documents:

- AccuRoute Acquisition tool
- AccuRoute Queue (AQ)

A Typical Workflow

This workflow demonstrates how to work with a document that is missing some required information.

Quick Start Tutorial #2

This tutorial covers:

- Scanning a document into AQ to view it
- Marking one page with missing information
- Rescanning the page with missing information
- Resolving the missing information
- Filing the document in the database

Scan and View

You use your scanner to scan hard-copy documents into the system, using the Upland AccuRoute Acquisition Tool software. The electronic document is sent to AccuRoute Queue (AQ) where it displays in a numbered file folder. Notice that the file folder has content, indicated by (1). You can view the document image by clicking on its folder, which displays under New Items.

Figure 5-A: Scan

Open the Upland AccuRoute Acquisition Tool client program.

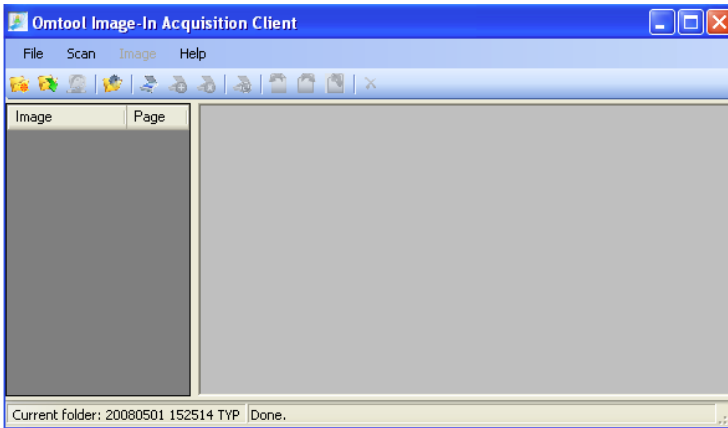


Figure 5-B: New Folder

Create a new numbered file folder.

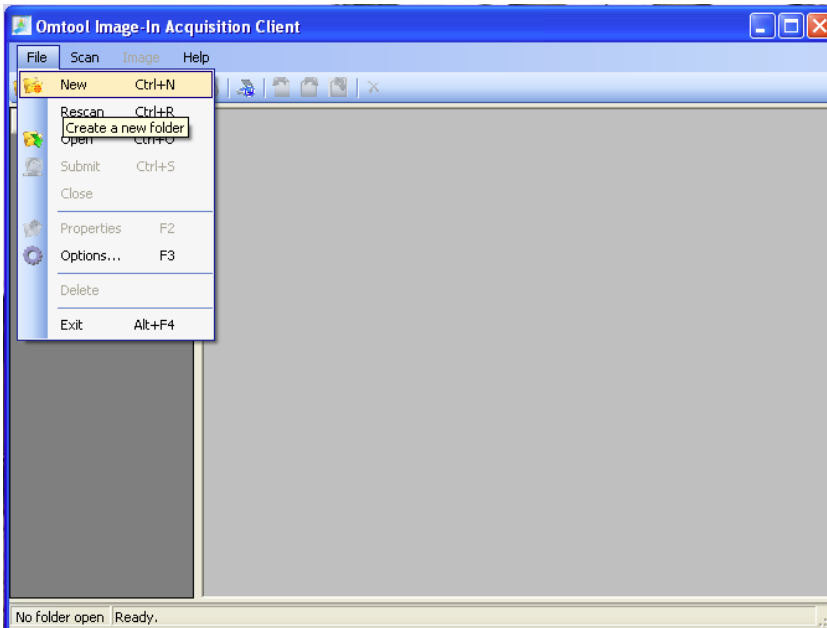


Figure 5-C: New folder

A folder number is automatically generated. Type in the Medical Record and Account Number. (For this example, the file number given ends in QS, which displays later in AccuRoute Queue to help follow the sample process.)

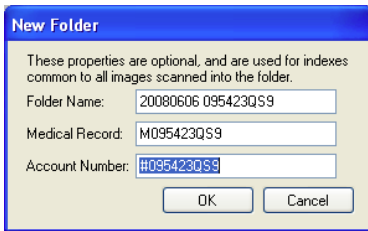


Figure 5-D: Scan

Put all the pages of the document into the scanner. Click **Scan>Scan**. The example here is a 6 page document.

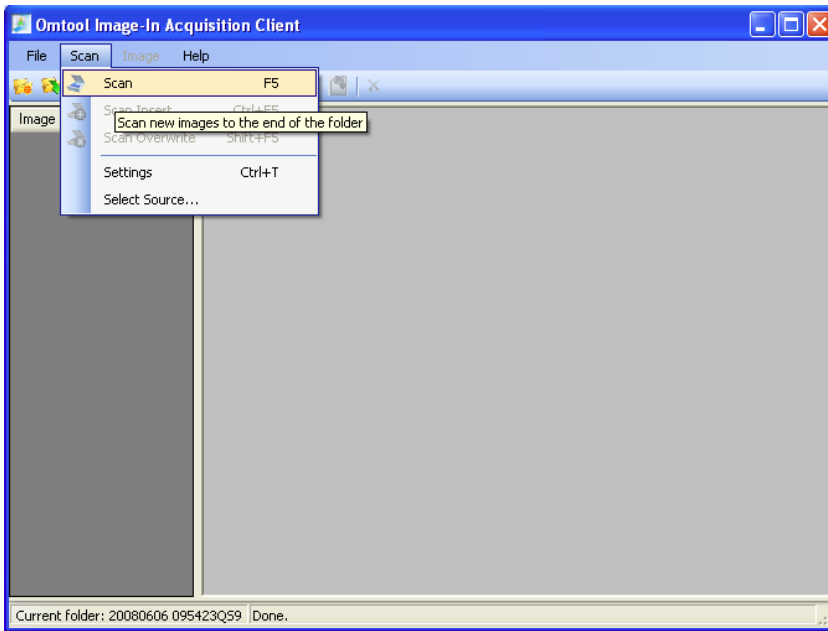


Figure 5-E: Scanning

The AccuRoute Acquisition Tool software scans the document.

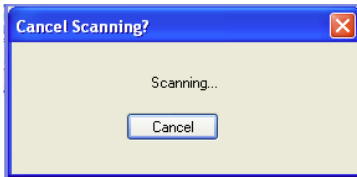


Figure 5-F: View

The pages are all visible in the Image Viewer, in the order in which they were scanned. Click on each page number on the left to see the image in the right pane. Notice that each of the 6 one-sided pages is separate, indicated by the “1” next to each page. The “F” indicates that a page is the front of the hard copy document page.

Tip The AccuRoute Acquisition Tool does scan double-sided pages as well. Click the Double-Sided icon on the Toolbar before following the procedure above. The back side of the page is indicated by a “B”.

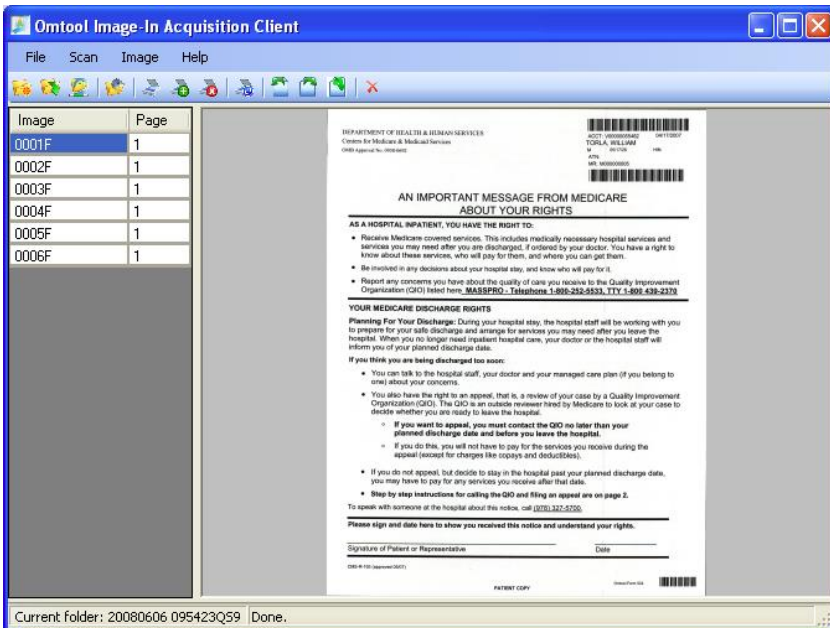


Figure 5-G: Merge

Merge the second page with the first, to begin combining the single pages into one document. Highlight the second page.

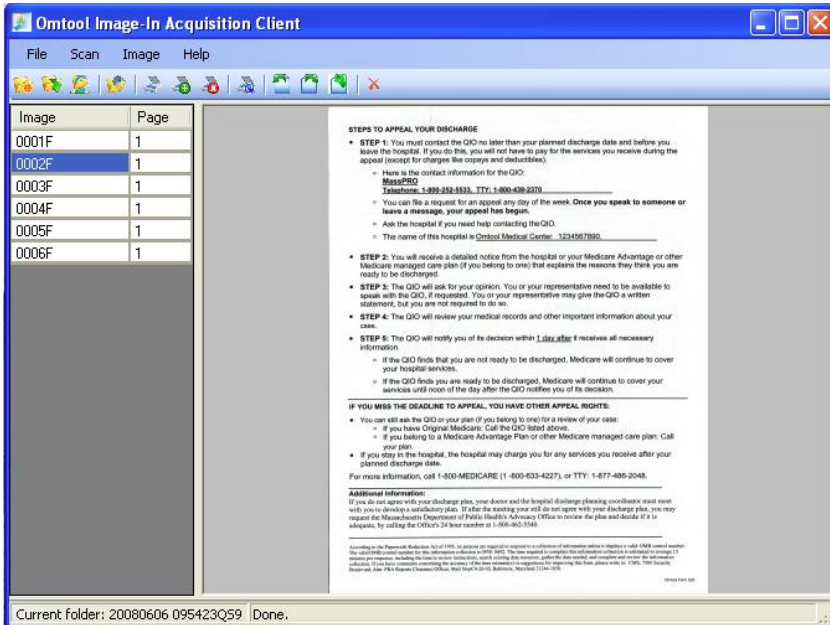


Figure 5-H: Merge Click Image>Merge/Split>With previous.

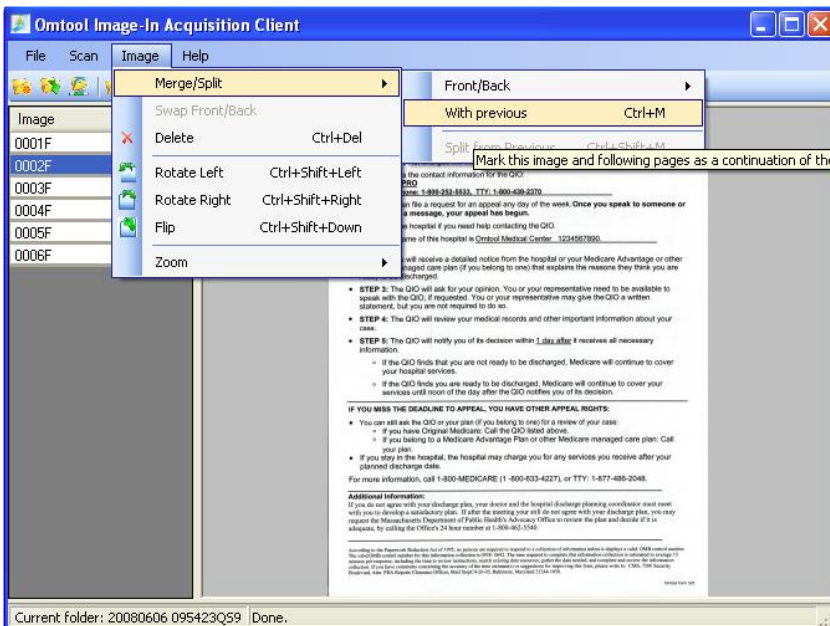


Figure 5-J: Merge

Repeat the process for the remaining single pages, until they are all merged into one document, as indicated by the page numbers 1 through 6.

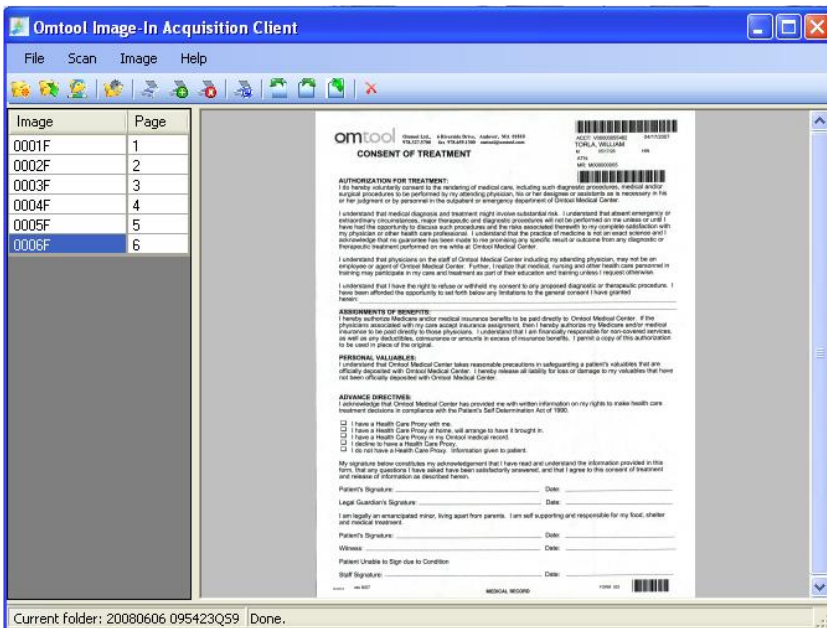


Figure 5-K: Submit Click **File>Submit** to send the document folder to AccuRoute Queue for processing.

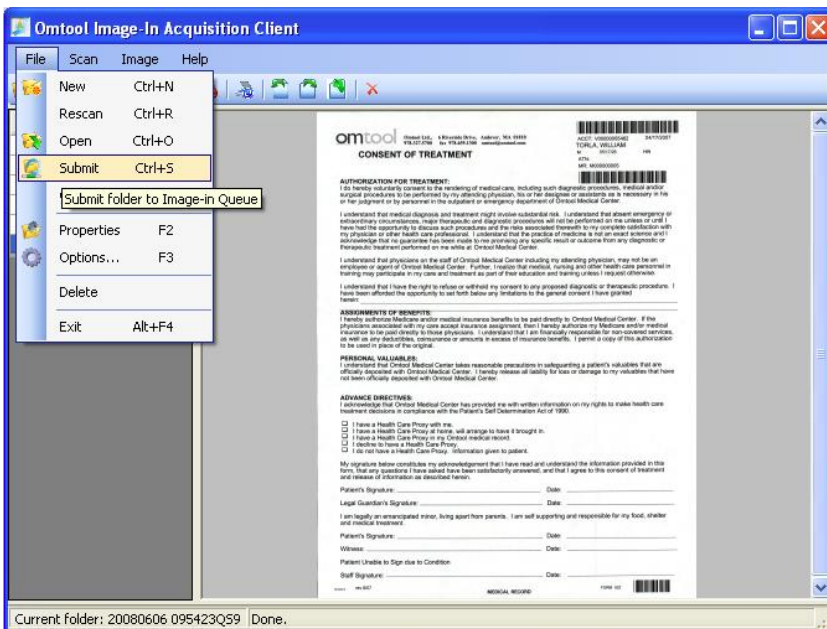


Figure 5-L: Submit

The AccuRoute Acquisition software confirms the file folder has been sent to AQ.

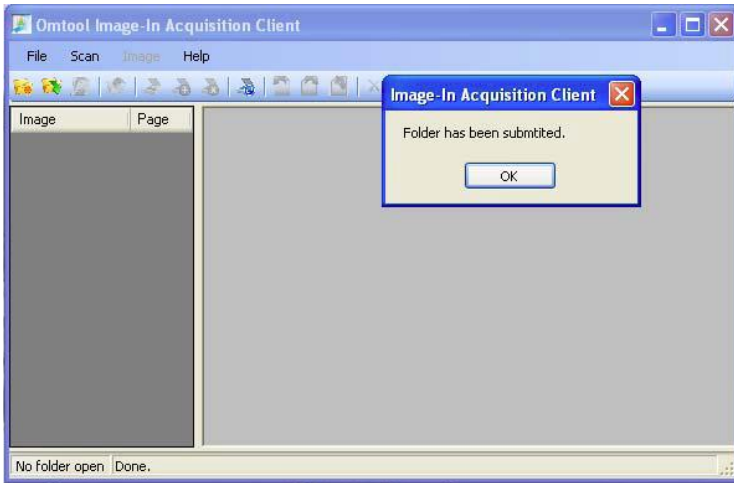


Figure 5-M: View in AQ

In the AccuRoute Queue software, the file displays under New Items (file name ending in QS given previously in the AccuRoute Acquisition tool. Notice the (1) next to the file number, indicating where the file currently is.).

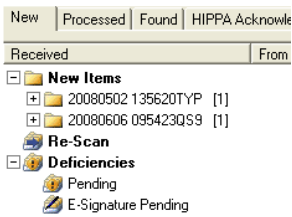
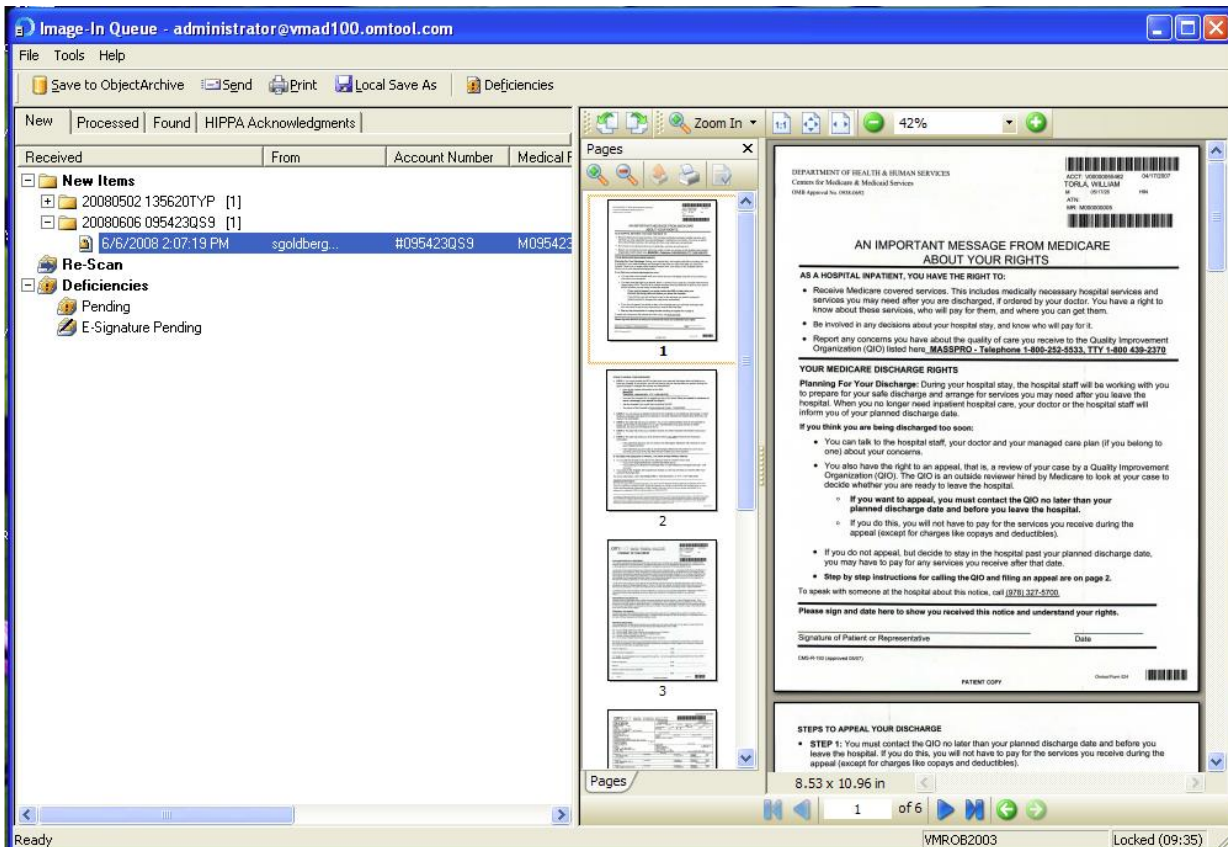


Figure 5-N: View

Click on the document in the Item View pane to view it in the PDF viewer.



At this point, you can route a page (to a recipient who can supply missing information) or send the whole document to a recipient, move the document to the Processed area or save it to the database.

Mark for follow-up

A page is missing some information. Mark this page for follow-up. For missing information, a separate routing cover sheet is created automatically and used to track each page. The folder is also now displayed under Pending. Notice the file folder where the document currently is indicates contents by the (I).

Figure 5-O: Flag Missing Information

When information is missing from the document file, highlight the relevant page. Click on the **DEFICIENCIES** icon. The **DEFICIENCIES FOR PAGE "X"** window below displays. Click **NEW**.

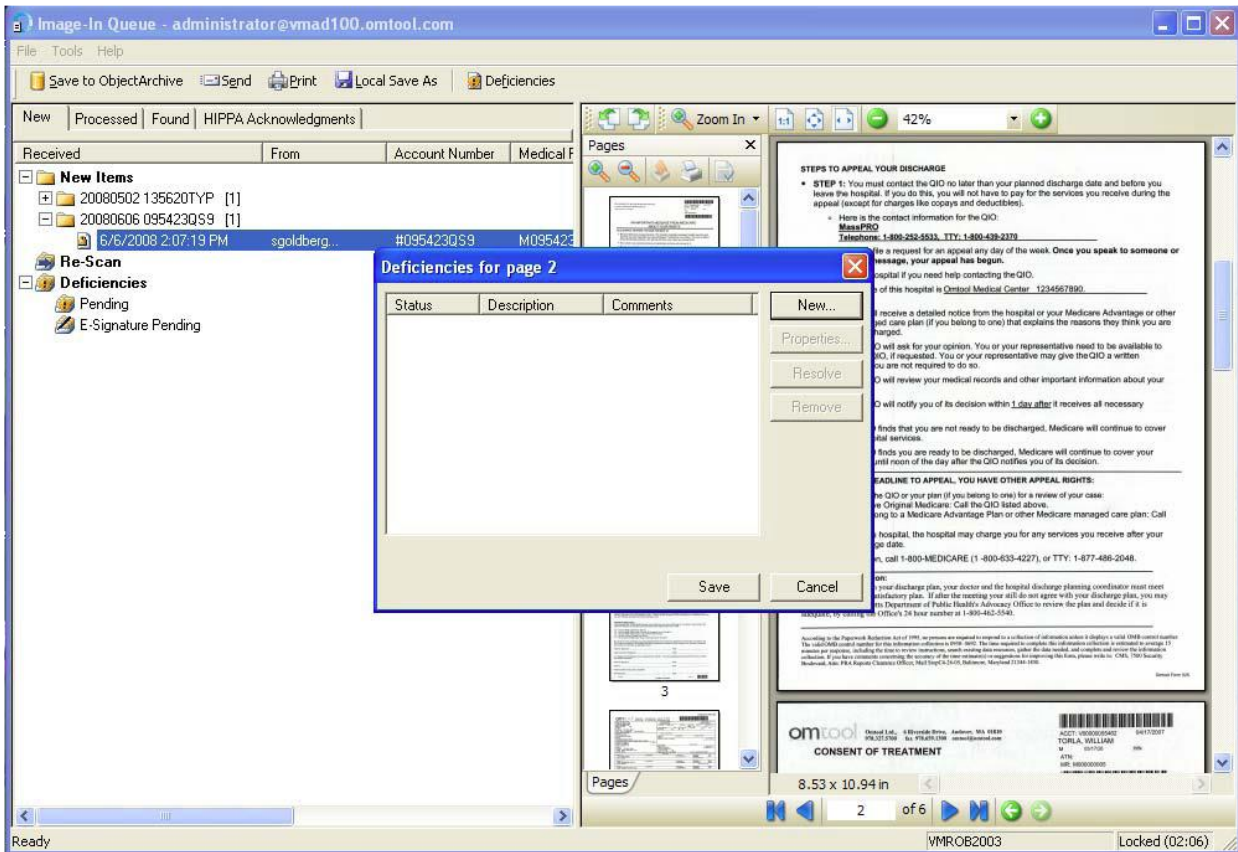


Figure 5-P: Flag Missing Information

The Deficiencies Properties window below displays. Choose **MISSING INFO** (the default for demo purposes. The choices for categories of missing information may be customized for your location by your Document Administrator and may vary.)

Image-In Queue - administrator@vmad100.omtool.com

File Tools Help

Save to ObjectArchive Send Print Local Save As Deficiencies

New Processed Found HIPPA Acknowledgments

| Received | From | Account Number | Medical F |
|------------------------|--------------|----------------|-----------|
| New Items | | | |
| 20080502 135620TYP [1] | | | |
| 20080606 095423QS9 [1] | | | |
| 6/6/2008 2:07:13 PM | sgoldberg... | #095423QS9 | M095423 |

Re-Scan

- Pending
- E-Signature Pending

Deficiencies for page 2

Deficiency Properties

Deficiency: <select one>

Assignee: <select one>

Notes: Missing Info
Signature Required

OK Cancel

Save Cancel

STEPS TO APPEAL YOUR DISCHARGE

- STEP 1:** You must contact the QIO no later than your planned discharge date and before you leave the hospital. If you do this, you will not have to pay for the services you receive during the appeal (except for charges like copays and deductibles).

Here is the contact information for the QIO:
MassPRO
 Telephone: 1-800-252-5633, TTY: 1-800-438-2370

If you are requesting an appeal any day of the week. Once you speak to someone or message, your appeal has begun.

If you need help contacting the QIO, call the Patient Advocate Office at the hospital in **Dorset Medical Center** 1234567890.

If you receive a detailed notice from the hospital or your Medicare Advantage or other paid care plan (if you belong to one) that explains the reasons they think you are targeted.

- Do not ask for your opinion. You or your representative need to be available to the QIO, if requested. You or your representative may give the QIO a written statement and you are not required to do so.
- Do not review your medical records and other important information about your care.
- Do not notify you of your decision within 1 day after it receives all necessary information.
- If you find that you are not ready to be discharged, Medicare will continue to cover your care until the next day after the QIO notifies you of its decision.
- If you find you are ready to be discharged, Medicare will continue to cover your care until the next day after the QIO notifies you of its decision.

SADLINE TO APPEAL, YOU HAVE OTHER APPEAL RIGHTS:

If you are the QIO or your plan (if you belong to one) for a review of your case: Original Medicare: Call the QIO listed above. Medicare Advantage Plan or other Medicare managed care plan: Call the QIO listed above.

If you are not the QIO or your plan, the hospital may charge you for any services you receive after your appeal date.

If you are not the QIO or your plan, you may want to call 1-800-MEDICARE (1-800-433-4227), or TTY: 1-877-486-2048.

NOTE: If you are not the QIO or your plan, your doctor and the hospital discharge planning coordinator must meet with you to discuss your discharge plan. If after the meeting you still do not agree with your discharge plan, you may want to call the Department of Public Health's Advocacy Office to review the plan and decide if it is in your best interest.

According to the Payment Reduction Act of 1999, no person who is required to accept a collection of information under a Federal information collection instrument that is subject to the information collection requirements of 5 CFR 1627.201. The use of this collection of information is subject to the information collection requirements of 5 CFR 1627.201. The use of this collection of information is subject to the information collection requirements of 5 CFR 1627.201. The use of this collection of information is subject to the information collection requirements of 5 CFR 1627.201.

omtool
 Consent of Treatment
 8.53 x 10.94 in
 2 of 6
 VMROB2003
 Locked (02:06)

Figure 5-Q: Flag Missing Information

Type any notes or comments, for example, the details of the missing information. Click **OK**.
The missing information is noted as Pending on the Deficiencies for that page. Click Save.

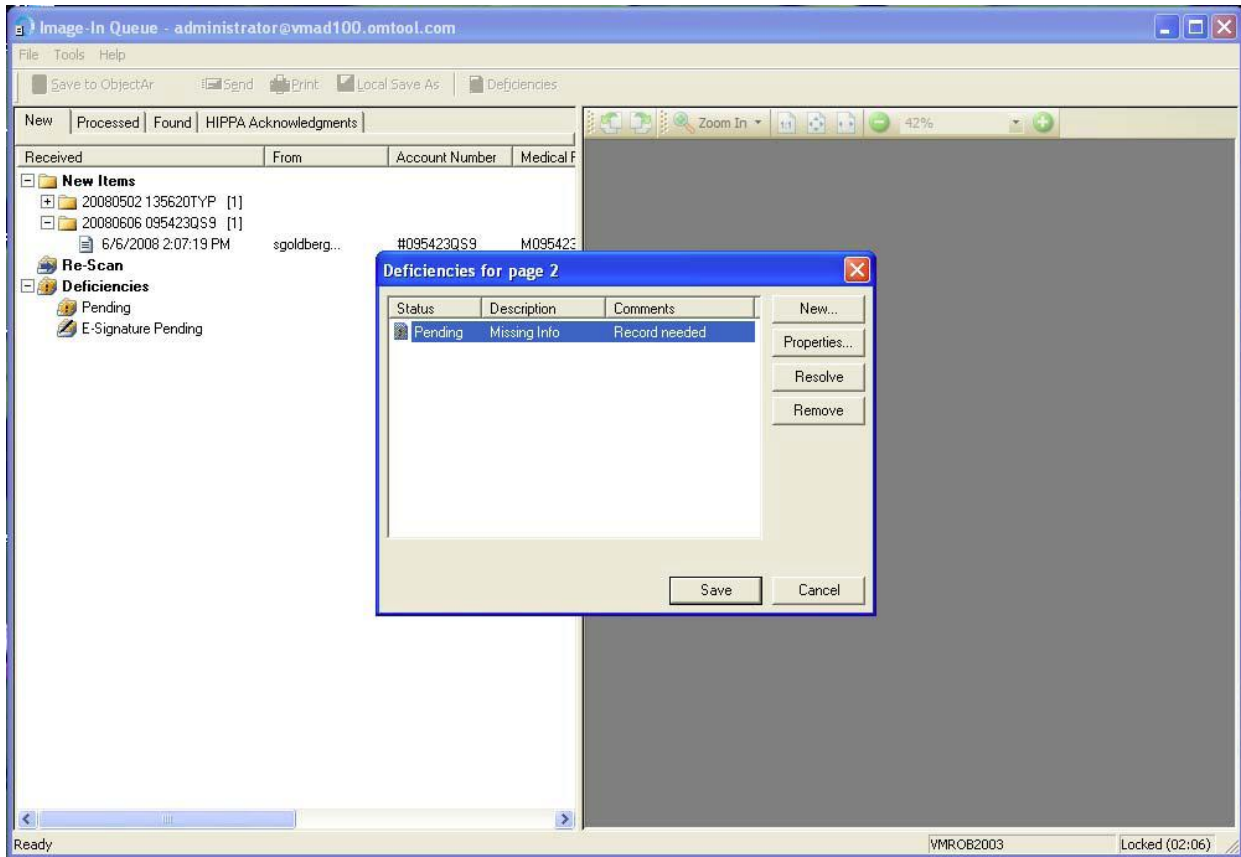


Figure 5-R: Flag Missing Information

A Routing Sheet is automatically created, as noted in the window that displays, for the page with missing information. The Routing Sheet, with the image of the flagged page, prints. (See Figure 1-Y for image.)

Note Note: If more than one page is flagged as having missing information, a separate Routing Sheet is created for each page.

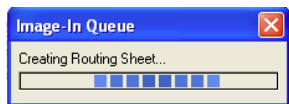
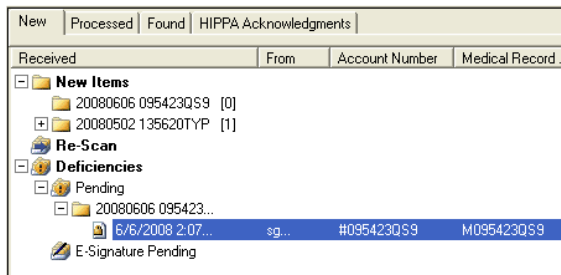


Figure 5-S: Flag Missing Information

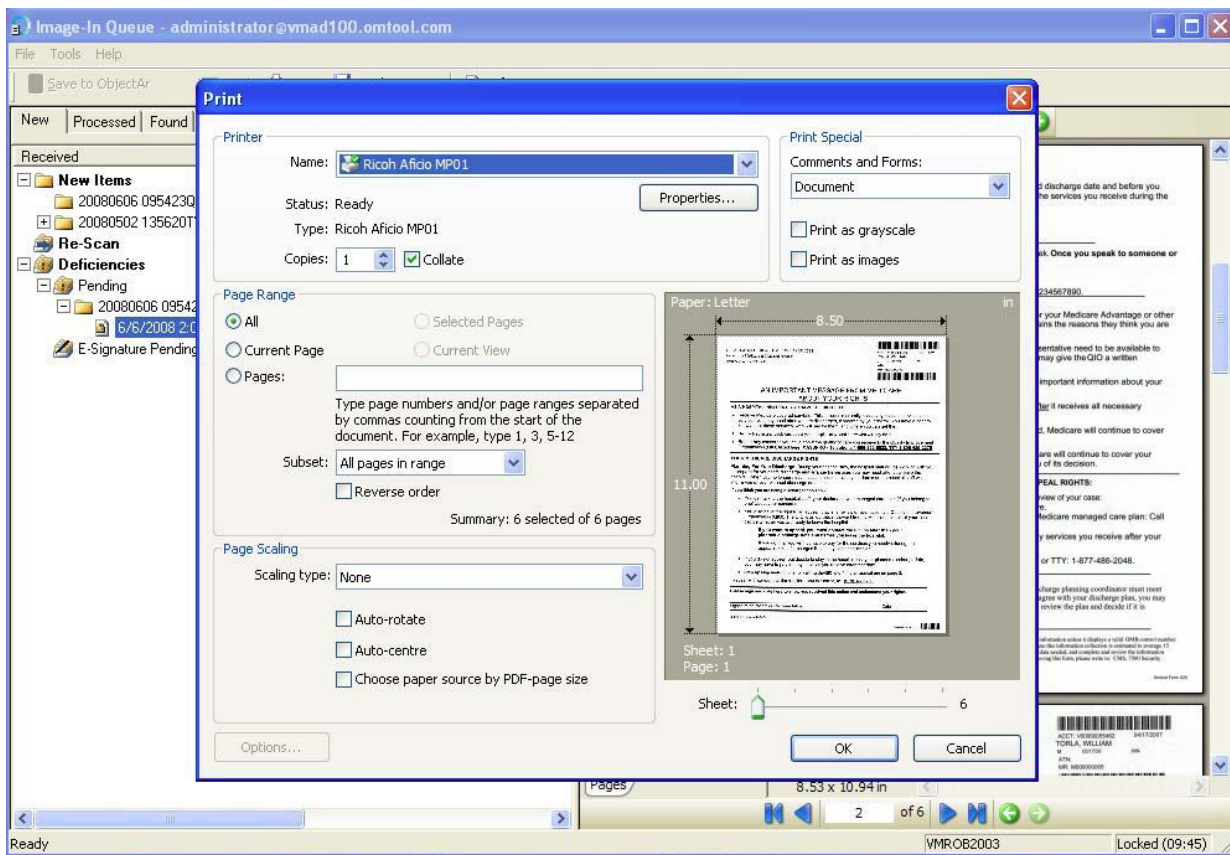
The document file folder now displays in the Item View pane under Deficiencies/Pending, as well as New Items. Note that the number in parentheses after the file name under Deficiencies/Pending indicates the location of the file after the last completed step.



The information flagged as missing now has to be supplied, either by you or another staff member. You may print the page with the missing information and deliver it by hand, E-mail or fax it and let the recipient print it.

Figure 5-T: Print the Page

Highlight the page and print it. Click on the **PRINTER** icon (or click File>Print or Cntl+P)



Rescan and Resolve

When the missing information is supplied, print and rescan the Routing Sheet and its accompanying, updated page. The pages can be seen in the Upland AccuRoute Acquisition Tool software. When you submit the page and Routing Sheet to AQ, the folder is now also displayed under Rescan. Notice that the Rescan file folder has contents (1)

In AQ under Rescan, click on the file. A message displays indicating that the page is being replaced into the original document file. The Deficiencies window for marking the missing information automatically displays, prompting you to Resolve the deficiency. Resolve the deficiency. Notice where the “live” file is located; the Rescan file folder is empty (0), the file number also displays in Processed and the file folder displays (1) under New Items.

Figure 5-U: Rescan the page

In the AccuRoute Acquisition tool, rescan the updated page. Place the document in the scanner. Click **File> Rescan**.

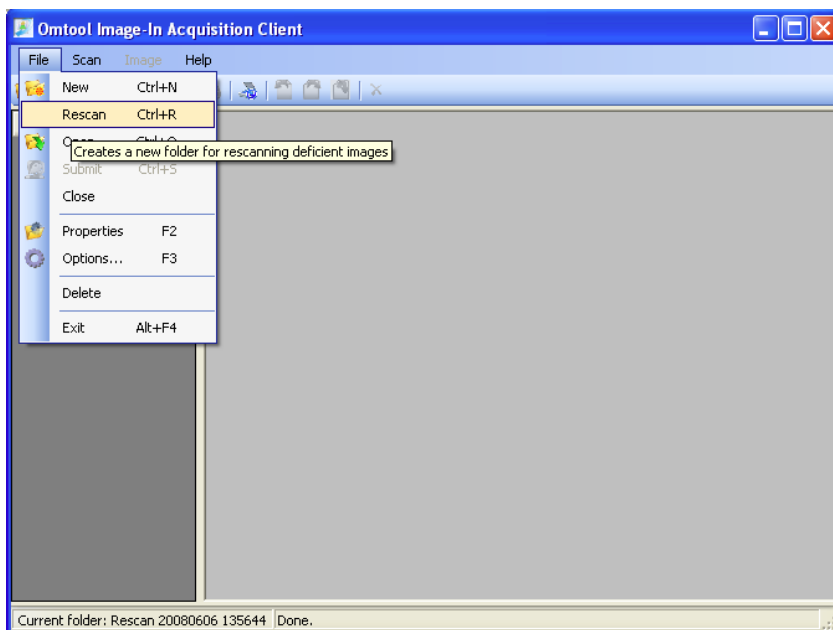


Figure 5-V: Rescan the page Click **Scan>Scan**.

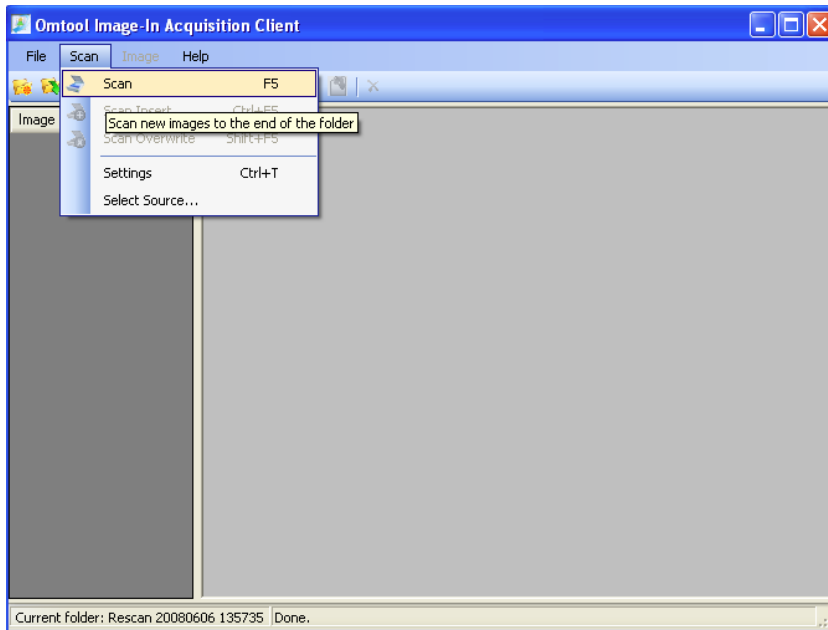


Figure 5-W: Rescan the page

The AccuRoute Acquisition Tool software scans the document.

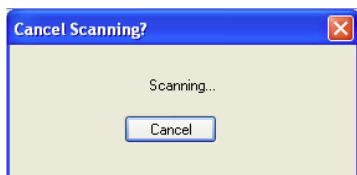


Figure 5-X: Rescan the page

The Routing Sheet that was generated displays as Page 1.

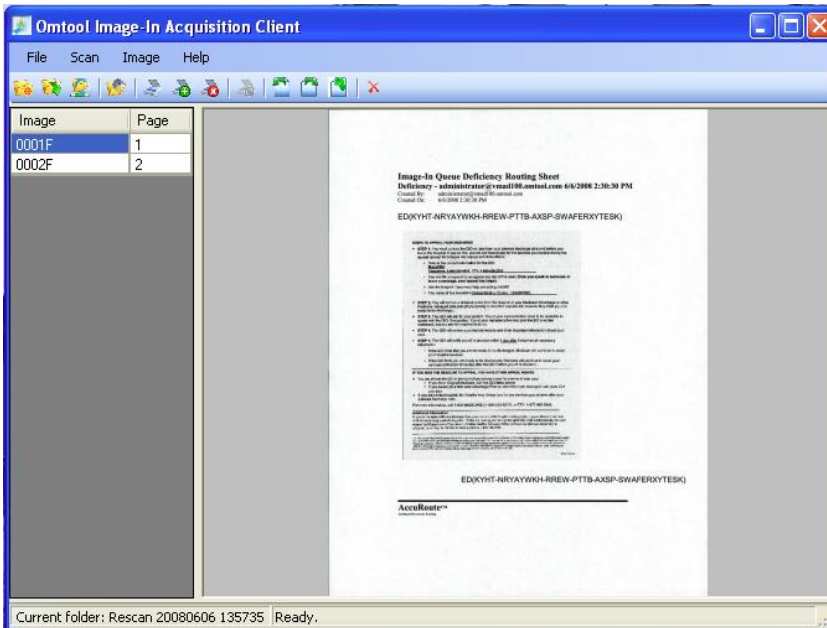


Figure 5-Y: Rescan the page

The updated document page displays as Page 2.

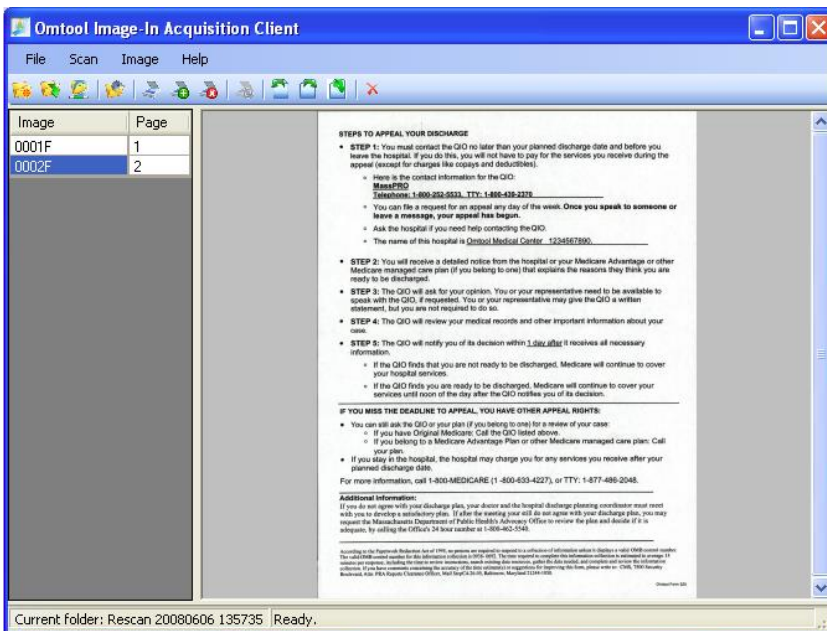


Figure 5-AB: View in AQ

The document displays in AccuRoute Queue, in a folder under Rescan.

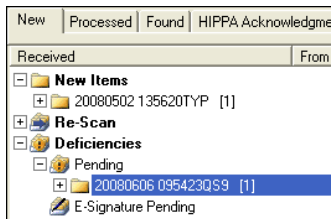


Figure 5-AC: View in AQ

Click on the file in the folder under Rescan in order to view the updated document in the PDF Viewer. AQ displays a window indicating that the original image is being prepared to be replaced with the updated one.

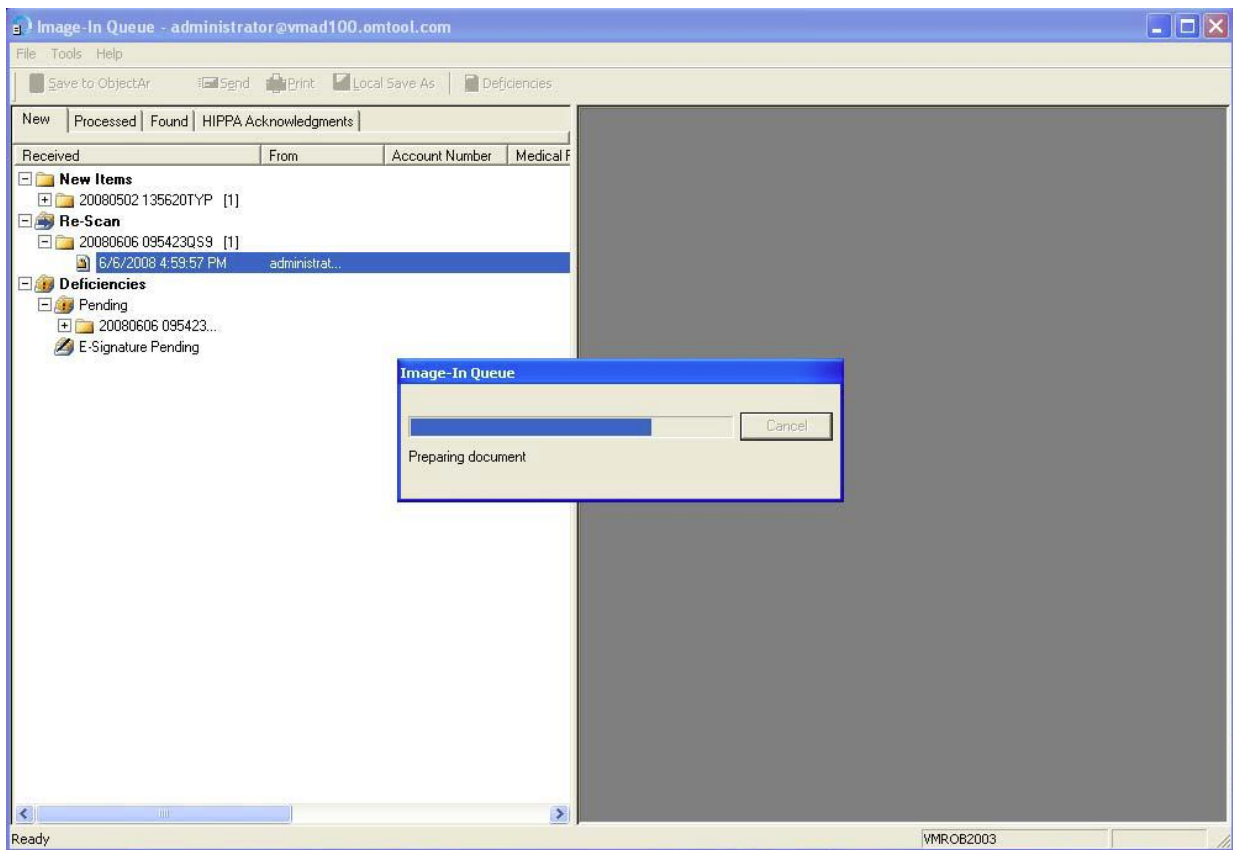


Figure 5-AD: Resolve missing information

The Deficiencies window for that page displays automatically to prompt you to resolve the deficiency. Note that only the New button is enabled.

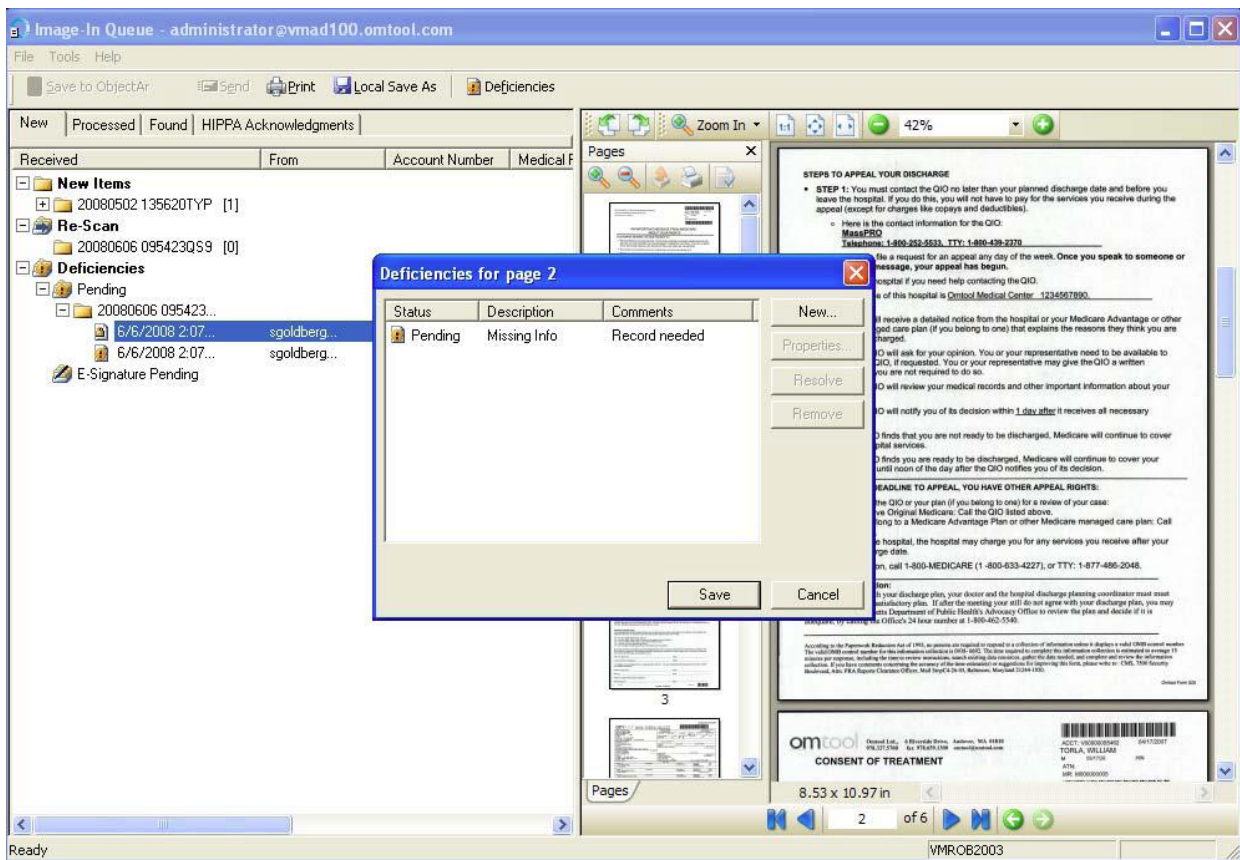


Figure 5-AE: Resolve missing information

Highlight **PENDING**. The buttons are all enabled.

Image-In Queue - administrator@vmad100.omtool.com

File Tools Help

Save to ObjectAr Send Print Local Save As Deficiencies

New Processed Found HIPPA Acknowledgments

Received From Account Number Medical F

New Items

- 20080502 135620TYP [1]

Re-Scan

- 20080606 095423Q\$9 [0]

Deficiencies

- Pending
 - 20080606 095423...
 - 6/6/2008 2:07... sgoldberg...
 - 6/6/2008 2:07... sgoldberg...
 - E-Signature Pending

Deficiencies for page 2

| Status | Description | Comments |
|---------|--------------|---------------|
| Pending | Missing Info | Record needed |

New... Properties... Resolve Remove Save Cancel

STEPS TO APPEAL YOUR DISCHARGE

- STEP 1:** You must contact the QIO no later than your planned discharge date and before you leave the hospital. If you do this, you will not have to pay for the services you receive during the appeal (except for charges like copays and deductibles).

Here is the contact information for the QIO:

MISSISSIPPI
 Telephones: 1-800-252-5533, TTY: 1-800-499-2370

File a request for an appeal any day of the week. Once you speak to someone or message, your appeal has begun.

request if you need help contacting the QIO.

of this hospital is Omsol Medical Center - 1234567890.

If you receive a detailed notice from the hospital or your Medicare Advantage or other paid care plan (if you belong to one) that explains the reasons they think you are charged.

QIO will ask for your opinion. You or your representative need to be available to QIO, if requested. You or your representative may give the QIO a written opinion if you are not required to do so.

QIO will review your medical records and other important information about your appeal.

QIO will notify you of its decision within 1 day after it receives all necessary information.

If QIO finds that you are not ready to be discharged, Medicare will continue to cover appeal services.

If QIO finds you are ready to be discharged, Medicare will continue to cover your appeal until noon of the day after the QIO notifies you of its decision.

DEADLINE TO APPEAL, YOU HAVE OTHER APPEAL RIGHTS:

the QIO or your plan (if you belong to one) for a review of your case: Original Medicare: Call the QIO listed above. Medicare Advantage Plan or other Medicare managed care plan: Call your plan for a Medicare Advantage Plan or other Medicare managed care plan. Call your plan, call 1-800-MEDICARE (1-800-633-4227), or TTY: 1-877-486-2048.

When you are discharged, your doctor and the hospital discharge planning coordinator must meet with you to discuss your appeal. If after the meeting you still do not agree with your discharge plan, you may call the Department of Public Health's Advisory Office to review the plan and decide if it is appropriate for you.

According to the Department of Public Health's Advisory Office, you should be notified in a written notice of your appeal rights. This notice should be completed by the information submitted to you. If you do not receive this notice, you should call the Department of Public Health's Advisory Office to review the plan and decide if it is appropriate for you.

omtool
 Consent of Treatment
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Figure 5-AF: Resolve missing information

Click on the **RESOLVE** button to indicate that the missing information has been supplied. The confirmation window displays. Click **Yes**.

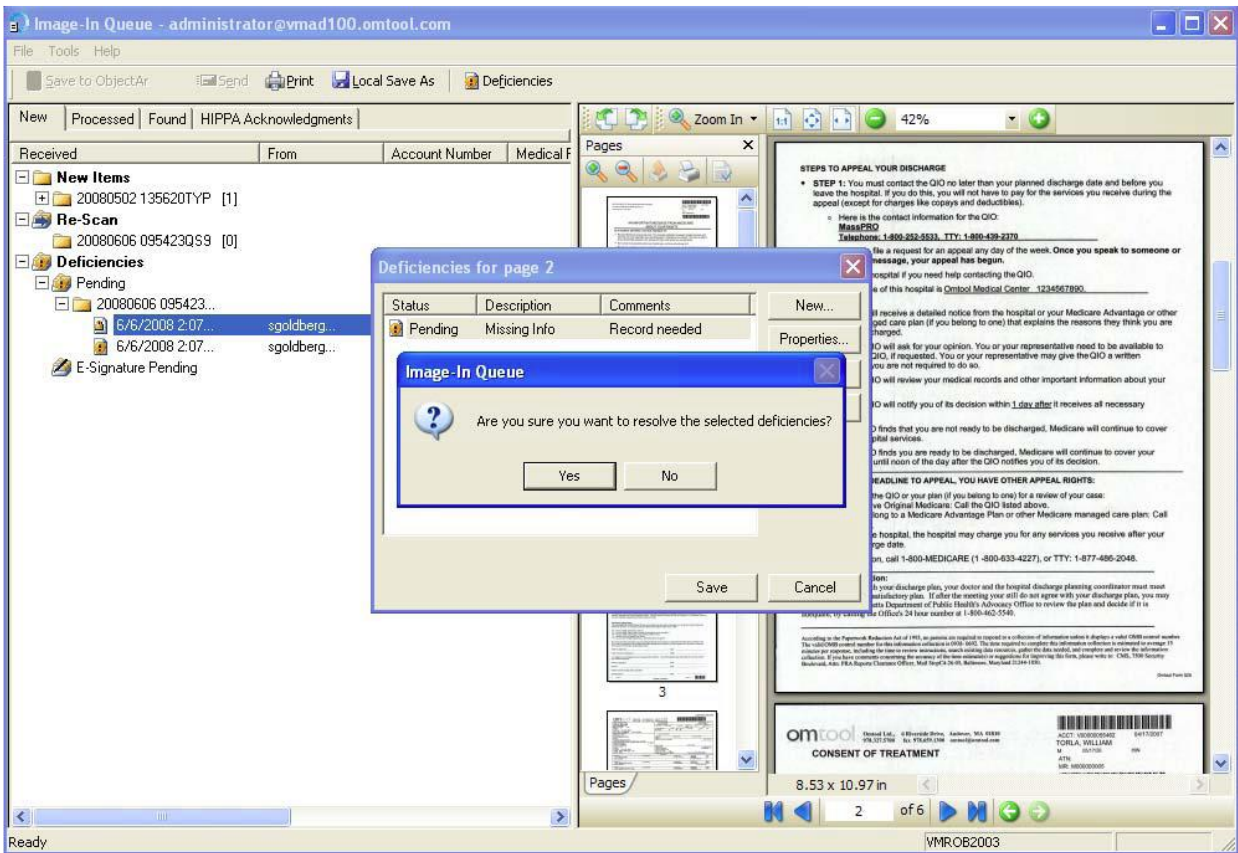


Figure 5-AG: Resolve missing information

The Deficiencies window for that page indicates that the missing information has been resolved. Click Save.

Image-In Queue - administrator@vmad100.omtool.com

File Tools Help

Save to ObjectAr Send Print Local Save As Deficiencies

New Processed Found HIPPA Acknowledgments

Received From Account Number Medical F

New Items

- 20080502 135620TYP [1]

Re-Scan

- 20080606 095423QS9 [0]

Deficiencies

- Pending
 - 20080606 095423...
 - 6/6/2008 2:07... sgoldberg...
 - 6/6/2008 2:07... sgoldberg...
 - E-Signature Pending

Deficiencies for page 2

| Status | Description | Comments |
|--|--------------|---------------|
| <input checked="" type="checkbox"/> Resolved | Missing Info | Record needed |

New... Properties... Resolve Remove Save Cancel

STEPS TO APPEAL YOUR DISCHARGE

- STEP 1:** You must contact the QIO no later than your planned discharge date and before you leave the hospital. If you do this, you will not have to pay for the services you receive during the appeal (except for charges like copays and deductibles).
- Here is the contact information for the QIO:
MassPRO
Telephone: 1-800-252-5633, TTY: 1-800-439-2370
- File a request for an appeal any day of the week. Once you speak to someone or message, your appeal has begun.
- If you need help contacting the QIO:
hospital. If you need help contacting the QIO:
of this hospital is **Oxford Medical Center - 1234567890**.
- If you receive a detailed notice from the hospital or your Medicare Advantage or other paid care plan (if you belong to one) that explains the reasons they think you are charged.
- QIO will ask for your opinion. You or your representative need to be available to QIO. If requested, you or your representative may give the QIO a written you are not required to do so.
- QIO will review your medical records and other important information about your
- QIO will notify you of its decision within **1 day** after it receives all necessary
- Q finds that you are not ready to be discharged, Medicare will continue to cover
- Q finds you are ready to be discharged, Medicare will continue to cover your

HEADLINE TO APPEAL, YOU HAVE OTHER APPEAL RIGHTS:

the QIO or your plan (if you belong to one) for a review of your case:
Original Medicare: Call the QIO listed above.
Medicare Advantage Plan or other Medicare managed care plan: Call
hospital, the hospital may charge you for any services you receive after your
date.

OR, call 1-800-MEDICARE (1-800-633-4227), or TTY: 1-877-486-2048.

NOTE:
In your discharge plan, your doctor and the hospital discharge planning coordinator must meet
satisfactory plan. If after the meeting you still do not agree with your discharge plan, you may
the Department of Public Health's Advocacy Office to review the plan and decide if it is
Office's 24 hour number at 1-800-462-5546.

omtool Oxford Ltd., 4 St Albans Way, Andover, MA 01810
978.277.2900 fax: 978.277.0200 admin@omtool.com

CONSENT OF TREATMENT

ACCT: 0000000000
TORLA, WILLIAM
M
DOB: 000000
ATN: 0000000000

8.53 x 10.97 in

2 of 6

Ready VMROB2003

Figure 5-AH: Resolve missing information

The file folder displays under New Items.

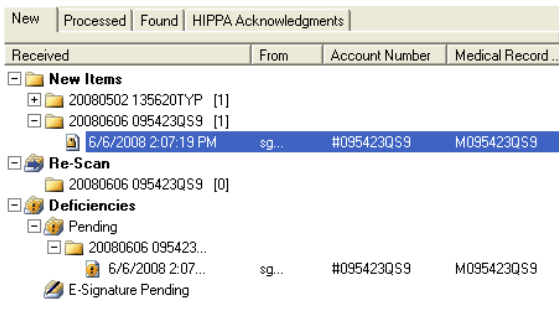
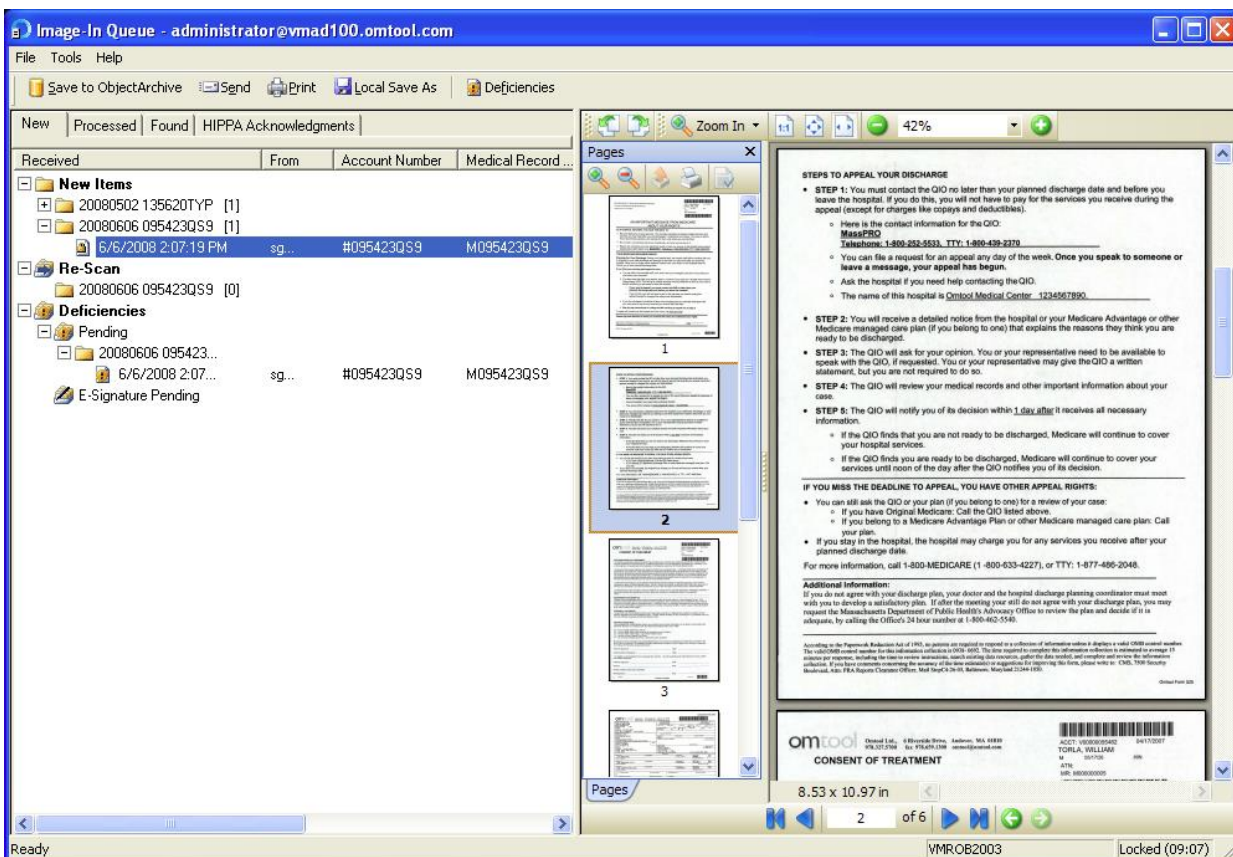


Figure 5-AI: Resolve missing information

The updated document can be viewed in the PDF Viewer.



Save to Database

Highlight the folder. Save the folder to the database. The folder is no longer displayed in the AQ file folder tree.

Figure 5-AJ: Save document in database

With the document highlighted, click Save to Object Archive. The Profile into...window displays. Click in the drop-down box to choose the style of form to use. (The form may be specified by your Document Administrator.) Click OK.

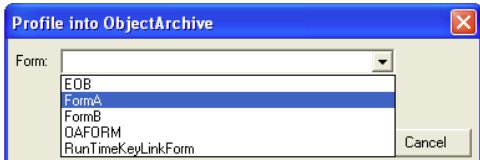


Figure 5-AK: Save document in database

The Profile into...window displays with the account and medical record numbers you typed previously. Fill in the other information required. Click OK.

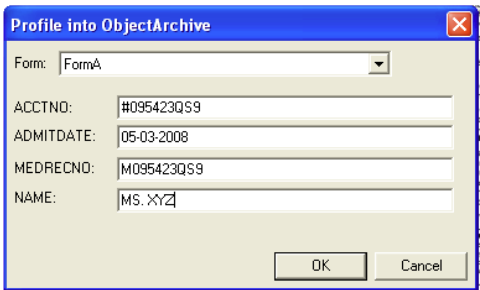


Figure 5-AL: Save document in database

The file folder displayed under New Items has (0), indicating that the document no longer resides there.

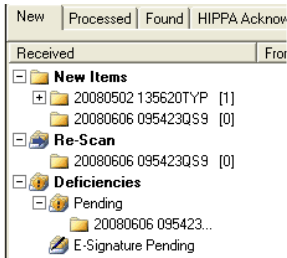


Figure 5-AM: Save document in database

The file is now displayed in the list under the Processed tab.

