


Name of Policy: <u>Quality Control and Indexing</u> Policy Number: 3364-105-203 Department: Health Information Management Approving Officer: Director, Health Information Management Responsible Agent: Director, Health Information Management Scope: Health Information Management	 Effective Date: August 20, 2007
<input checked="" type="checkbox"/> New policy proposal <input type="checkbox"/> Major revision of existing policy	<input type="checkbox"/> Minor/technical revision of existing policy <input type="checkbox"/> Reaffirmation of existing policy

(A) Policy Statement

All pages scanned into the Horizon Patient Folder imaging system will be indexed to the appropriate location. Quality audits will be performed to ensure that documents are being placed in the appropriate location. Indexing is performed on a daily basis according to an established priority schedule that assures the release of images into HPF within 24 hours of a patient encounter.

(B) Purpose of Policy

To ensure that the images are checked for quality, indexed to the correct patient and document type, and released for viewing within 24 hours of receipt by the HIM Department.

(C) Procedure

I. Indexing Batch from QC/Index Queue (*qcindexq*):

- A. Select Open Batch from Quickbar and select *qcindexq*.
- B. Select oldest batch to index by double clicking on batch label or by clicking once on batch label (sort by column by clicking on column heading).
- C. Click OK.
- D. Ensure that first page of batch is seen first by clicking on first document of batch on document tree.
- E. Enter Encounter (account) number associated with image seen in right window in Encounter field. Press Enter on keyboard. Verify that interface information is correct (medical record number, facility, admit date, discharge date, patient type, name, date of birth, sex, social security number).
 1. If encounter number is not known, with cursor in encounter number field, press Enter.
 2. Type data in patient name or MRN fields and click Search.
 3. Select appropriate encounter and click Select or double click encounter.
 4. Press Enter.
- F. If Document Type field is already indexed from barcode or previous page, verify that information is correct.
- G. Select Facility if default is not correct.
- H. Enter document code in document code field; press ENTER
 1. Double-click document type.
 - a) There are several document types that are listed twice. For example, Discharge Summary and Discharge Summary Scanned. Always use the one listed with "scanned" at the end. The other document type is for the transcribed documents that are cold fed into the system.
 2. If an image is not of good quality, rescan the document on the flatbed scanner.
 3. Refer to Document Master Indexing Guide to locate form name and document type for unknown document types. If name is not found and document type is unknown, assign document type as "Unknown Document."
- I. Press Page Down on keyboard. If image belongs to same encounter and is same document type, click again on right-facing arrow. Continue until image at right is of a different document type or a different encounter/patient.

II. Splitting Documents:

- A. Split a multipage document into separate documents by:
 - 1. Locate page where new document should begin.
 - 2. Use the shortcut keys Alt S
 - 3. Index to correct document type following Procedure H above.

III. Merging Documents:

- A. Go to the first of two documents to be merged.
- B. Use the shortcut keys Alt M

IV. Deleting Pages:

- A. Highlight document on document tree, use the shortcut keys Ctrl D

V. Appending Page (places page at end of active document):

- A. Place page on scanner.
- B. Select document to which the page is to be appended.
- C. Use the shortcut keys Ctrl A
- D. Click Stop in Scan process message box.

VI. Inserting Pages and Documents:

- A. Insert page(s) into scanner.
- B. Locate page/document that should come after page/document to be inserted.
- C. Use the shortcut keys Alt C then P
- D. Click Stop in Scan Progress message box.


VII. Copying Documents and Pages:

- A. On document tree, highlight page/document to be copied.
- B. Right-click document on tree view and select Copy Page/Document.

VIII. Rescanning Pages:

- A. When isolated single documents are of poor quality and requires rescanning:
 - 1. Place document in scanner
 - 2. Use shortcut keys Alt C then R.
- B. When multiple documents or a batch is of poor quality and requires for rescanning:
 - 1. Place page(s) sideways in paper record.
 - 2. Right click document on Tree View and select Mark Document Rescan.
 - 3. Enter reason for rescan.
 - 4. Click Apply.
 - 5. Write the batch to the *rescanq* queue.
- C. Follow steps in Section I to complete Indexing process.

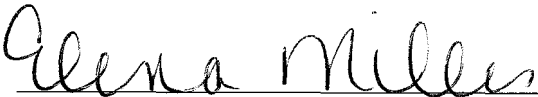
IX. Writing a Batch:

- A. Automatically
 - 1. Click on Write Next button on toolbar .
- B. Manually.
 - 1. Use shortcut keys Ctrl W

2. Select queue to receive batch from drop down list (i.e., *qcindexq*)
3. All new employees will write 100% of their batches to the *HIM_reviewq* until they are meeting 95% quality.
4. Employees that have been release from 100% quality review will write all batches to the *relmagq*

X. Storing paper batches following Indexing:

- A. Separate batches by patient type (i.e., inpatient, outpatient, emergency department, etc.).
- B. Place batch on designated shelf in date order.

Approved by:  Elena Miller Director, Health Information Management	Review/Revision Date: Next Review Date: 8/1/2010
Policies Superseded by This Policy: 10-203	

It is the responsibility of the reader to verify with the responsible agent that this is the most current version of the policy.