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Zoom 9.4

User's Guide

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Introduction

Zoom offers a streamlined way for you to import and link external documents and images to a patient's chart, the Patient screen, and the Carrier screen in Medisoft Clinical. Zoom allows you to scan your images directly into Medisoft Clinical via the TWAIN interface, or directly select pre-scanned or any other viewable files. Once in the Zoom interface, these files can be linked to a note in any part of the patient's chart and sent to a provider for review. You can also add text or comments to the note. The links appear in the note as a permanent hyperlink otherwise known as a PLINK. Unlike the LINK label marker, permanent hyperlinks are not removed when you save notes. Permanent hyperlinks can point to any file viewable by Internet Explorer (for example, HTML pages, graphics files, text files, and files in the Medisoft Clinical Knowledge Base). This also includes Internet Explorer extension plug-ins which must be installed separately and are not supported by Medisoft Clinical. The actual files for permanent hyperlinks are stored in Medisoft Clinical's Document and File Images system which also includes patient photos, EKG's, Spirometry etc.

You can also link a patient image and attachment to the Patient screen, and add a file as an attachment to the Carrier screen.

Using the Medisoft Clinical Zoom screen

To access Zoom, select the **Scan** option from the **Task** menu. This displays the Medisoft Clinical Zoom screen.

The Medisoft Clinical Zoom screen is highly configurable. You can select your own personal settings for the screen using the **Medisoft Clinical Zoom - Configuration** screen. For a complete explanation of these settings please see the **Zoom Configurations** section.

Medisoft Clinical Zoom offers two ways for you to acquire your documents. You can either use the browse or explorer mode to select your scanned images or documents, or you can click the **Scan** button to scan your documents into Zoom. See the **File** section for a complete explanation of how to use this mode to select your documents. See the **Scan** section for a complete explanation of how to use **Medisoft Clinical Zoom – Acquire Scan** screen to acquire new scanned documents.

The Medisoft Clinical Zoom screen is divided into 4 sections, which include File, Image(s), Document tabs, and Note. Each of these sections play a unique part in the scanning and linking process. In order to scan and link your document(s) you must complete the following tasks, in sequential order:

1. Select the file(s) you want to attach to the patient's chart.
2. Select the patient information.
3. Select where you want to attach the scanned documents to and enter a title or description for the document.
4. Save the information to the patient's chart.

The following sections describe the Medisoft Clinical Zoom screen in detail and will provide the information you need to successfully scan and link your images.

File section

This section of the screen may be viewed in explorer mode or browse mode. In browse mode, less screen space is used, allowing you to view your images in a larger area. To select the mode, click the down arrow  next to the Files title. To return to your previous mode, click the up arrow .

Note: You can configure Zoom to expand the Explorer Window when you move the pointer over the window in explorer mode. For details on how to turn this feature off see the **Zoom Configurations** section.

Browse Mode

In browse mode you can browse to the file or folder's location where your document(s) or image(s) are stored. Using this mode you can only select a single file to be linked to a note.



To select your documents from a folder:

- Click the **Browse** button to open the **Browse for Folder** screen. Navigate to the folder where your documents are stored. Select the folder and click **OK**. The selected folder will be displayed in the **Folder** field.

To select your documents from a file:

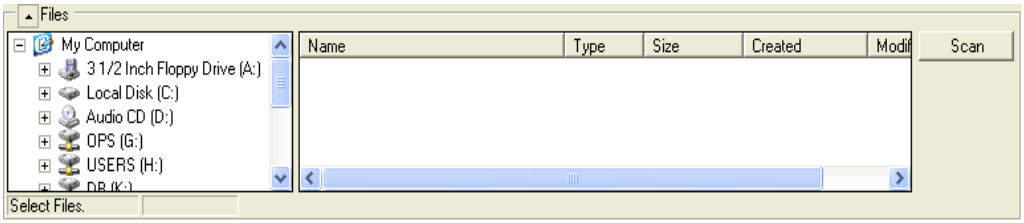
- Click the **Browse** button to open the **Choose File** screen. Navigate to the file you wish to link. Select the file and click **Open**. The selected file will be displayed in the **File** field. If there are multiple files in the folder, you can use the up and down arrows located in the **File** field to scroll through the files/documents. Each of the selected files/documents will be displayed in the Image(s) section of the screen. For a complete explanation of this section see the **Image(s)** section.

Explorer Mode

In explorer mode you can navigate to the folder where your files are stored. The files in the folder will be displayed in the Explorer Window. From this window you can select the document(s) or image(s) you want to link. You can select multiple documents and images from the same folder to be linked to the same note.

Important: You can only select one document or image for Patient Images, Patient Attachments, and Carrier Attachments.

You can sort the files by name, type, size, date created, and date modified, by clicking the corresponding column headers in the Explorer Window.



To select a file where your documents are stored in explorer mode:

- Navigate to the folder where your documents are stored. Click on the folder. The folder's contents are displayed in the Explorer Window. Select the file(s) you want to include in the single note. To select multiple files:
  - Click the first file, press and hold down SHIFT, and then click the last file.

    or
  - To select nonconsecutive files, press and hold down CTRL, and then click each file.

The selected file(s) will be displayed in the Image(s) section of the screen. See the **Image(s)** section of this document for a detailed explanation of this section. Please note selected files that are not supported image files, will not show up in the Image(s) section, although these files will still be linked in the note.

Image(s) section

The supported image file(s) you selected will be displayed in the Image(s) section of the Medisoft Clinical Zoom screen. If you selected multiple images you can scroll through your selected images by clicking the right document arrow . To scroll back to the previous image or document click the left arrow . If your file has multiple pages you can scroll through the pages by clicking the right page arrow , to scroll back to the previous page click the left arrow .

Note: You can configure the image window to expand when you move the pointer over the window. For details on how to turn this feature off see the **Zoom Configurations** section.

You can also click the right mouse button, to display the shortcut menu and choose the commands described above. The shortcut menu offers the following options:

- **Previous Document:** Select this option to view the previous document viewed.
- **Next Document:** Select this option to view the next selected document.
- **Previous Page:** Select this option to view the previous page viewed in the document.
- **Next Page:** Select this option to view the next page in the document.
- **Delete Document:** Select this option to delete the document displayed.
- **Delete Page:** Select this option to remove a page from the document. This option is helpful because it allows you to select which pages will be linked to the selected patient's chart. For example, if your document is a fax and you do not want to link the cover page to the patient's chart you can delete this page.
- **Merge Documents:** Select this option to merge your current documents into one document. If you have more than one document selected, you can merge your documents into one document. A confirmation message will be displayed when this option is selected. Click **Yes**, to proceed with the merge. Click **No**, to cancel the merge. Please note it is strongly recommended that merged documents be the same image type.
- **Split Pages:** Select this option to split your current document into separate documents. When this option is selected, you will receive a confirmation message. Click **Yes**, to proceed with the split. Click **No**, to cancel the split.

The **Zoom** drop-down menu allows you to increase or decrease the selected documents magnification level. To return the document or image to fit in the image window, select the **Fit** option. You can also magnify sections of the document by holding down the left mouse button.

You can view the document in a full-screen by double-clicking on the document, selecting the **Fullscreen Image** option from the **View** menu, or by pressing CTRL+F. When the document is displayed on the full-screen, you can magnify sections of the document by holding down the left mouse button. You can also zoom in and out with the wheel button, and move back and forth, and up and down by moving the mouse if the image is larger than the screen.

To return to the Medisoft Clinical Zoom screen, double-click on the document, or press the <ESC> key.

Scan section

You can scan documents by clicking the **Scan** button, selecting the **Scan** option from the **File** menu, or by pressing CTRL+S. This opens the **Medisoft Clinical Zoom – Acquire Scan** screen. This screen is used as the link between Medisoft Clinical and your scanner(s). Once you have selected the scan folder

and the options offered on this screen, click the **Acquire New** button and the TWAIN interface provided by your scanners manufacturer will present you with your scanning options.

The **Medisoft Clinical Zoom – Acquire Scan** screen is similar to the image layout section on the Medisoft Clinical Zoom screen. If your document has more than one page you can use the Page arrows to scroll through the pages of your document. If you are scanning multiple documents you can use the document arrows to scroll through the individual documents.

To scan your document(s):

1. Select a scan folder. The folder selected from the Medisoft Clinical Zoom screen is automatically displayed in this field. You can click the **Browse** button to navigate to folder's location where your files are stored.
2. Enter the file prefix in the **File Prefix** field. The file prefix selected from the Medisoft Clinical Zoom screen is automatically displayed in this field. Scanned files will be named with the file prefix with the current date and time appended to it.
3. Select the documents resolution from the **Purpose** drop-down menu. Available options include: **Black & White (Low Resolution)**, **Color (Medium Resolution)**, and **Photo (High Resolution)**. The selected resolution will dictate the size and format that the scanned image will be saved with. Low and Medium Resolution options will scan TIF image files, and the High Resolution Setting will scan PDF image files. Please note if you are merging or splitting 2 or more color images, the resulting image files will be dictated by the Purpose setting.
4. If you have more than one image to scan you can select whether to save your images in a single document, or as separate documents. To save your images in a single document select the **New As Single Document** check box. To save your scanned images as separate documents do not select this check box. Please note the default selection is un-checked.
5. Select the scanning source, by choosing the **Select Source** option from the **File** menu. This option allows you to select the scanner that will be used to scan your document(s). From the **Select Source** screen, select the scanner, and click **Select**.
6. Click the **Acquire New** button to scan your document(s). This will open the TWAIN interface. From this screen you can select your scanning preferences. Once the image(s) has been scanned, the image(s) can be viewed in the Image(s) section of the **Medisoft Clinical Zoom** screen. See the **Image(s)** section of this document for a complete explanation of this section.

Document tab section

Once you have selected your document(s), you can select where you want to attach the document(s).

- **Chart Note**: Click this tab to link files to a note in any part of the patient's chart.
- **Patient Photo**: Click this tab to link a patient photo to the Patient screen.
- **Patient Attachment**: Click this tab to attach file(s) to the Patient screen.
- **Carrier Attachment**: Click this tab to attach file(s) to Carrier Maintenance.

You can select the patient you want to have the document(s) attached to. To do this, type the patient's ID in the ID field. The ID field offers an auto-complete feature. Meaning when you type the patient's ID in the field, the application will display matching IDs and your last 5 ID entries, and up to 10 existing Medisoft Clinical ID's in the drop-down menu, allowing you to select the patient ID you are looking for.

You can also select the Lookup button or press <Enter> when any of the patient fields are selected to open the Lookup screen. If there is data in the patient fields, the Lookup screen will appear and do an autosearch on those fields (for example, if you type a last name and press enter, an autosearch with the

entered name will be performed). From this screen you can select a patient from a list of registered patients. See the Lookup section in the Help for a complete explanation of this screen.

Once you have entered or selected the patient's ID, the patient's last name, first name, middle initial, social security number, and birth date will automatically be displayed in the corresponding fields.

At this point pay attention to the ✔ or ✘ next to the Patient title. If a ✔ is located next to the Patient title, it means that you have selected a valid patient and you can go on to the Note section and enter the necessary data. If an ✘ is located next to the Patient title, you have been prohibited from starting the next step. To see what the problem is move the pointer over the ✘. A ToolTip window will appear and you will see the reason why you cannot proceed. The application gives you the opportunity to fix the error and move on to the next step. For example, you may receive an error because you have not selected a valid patient.

When a ✔ is located next to the Patient title, you can proceed to enter the note's data. The Note section allows you to select the section of the chart the note will be attached to. You can also select the title of the note, the date of the note, and the time of the note. Default selections for these options can be configured from the Medisoft Clinical Zoom Configuration screen. See the **Zoom Configurations** section for more information.

To enter patient and note information:

1. Enter patient's ID in the **ID** field. If a valid patient ID is entered, the Last Name, First Name, MI, SSN and Birth Date fields will automatically be entered with the patient's information. Please note the patient must be a registered patient in the Medisoft Clinical database.
   - You can use the **Lookup** button to search for a registered patient in the Medisoft Clinical database. See the **Lookup** section in the Help for a complete explanation of this screen.

   Note: If there is a ✔ located next to the Patient section, you can proceed to enter the note data. If there is an ✘ located next to the Patient section, move the pointer over the ✘ to see what the problem is. Please note the problem must be fixed before you enter the note's data.
2. Select the section of the chart you want the note attached to from the **Section** drop-down menu.
3. Enter the title of the note. You can enter a title, or you can select from a list of pre-configured or recent titles. The application will display your last 5 title entries in the drop-down menu. See the **Zoom Configurations** section for details. The title can be a health maintenance procedure (e.g., Mammogram) or an order name. If it is, the patient's health maintenance will be updated, or the order will be marked complete.
4. Select the note's date. Click the down arrow button to access the calendar.
5. Select the note's time. You can use the fields up and down arrows to scroll to the desired time.
6. Enter or select the provider's you want to link to the note. You can enter up to four providers in the corresponding fields, or you can click the arrow button to open the **Provider Select** screen. See the **Provider Select section** in the Help for a detailed explanation of this screen.
7. If you want to add additional text to the note, enter the note's text in the provided **Note Text** box.
8. Click the **Save** button to save the note to the selected section in the patient's chart.

Once the note is saved you can open the patient's chart, and select the section you saved the note to (for example, Progress Note). The note will be displayed with your scanned PLINKs in the body of the note.

Click the **Clear** button to clear the previous note's information. You can use the configuration settings to permanently delete the note, or archive the note. See the **Zoom Configurations** section for more information.

You may repeat the process described above until you have completed linking your files to notes in the patient's chart.

Click the **Close** button to exit Zoom.

To add a patient photo or patient attachment:

1. Click the Patient Photo tab or Patient Attachment tab.
2. Enter patient's ID in the ID field. If a valid patient ID is entered, the Last Name, First Name, MI, SSN and Birth Date fields will automatically be entered with the patient's information. Please note the patient must be a registered patient in the Medisoft Clinical database.
    - You can use the **Lookup** button to search for a registered patient in the Medisoft Clinical database. See the Lookup section for a complete explanation of this screen.

    If a patient photo already exists for the patient, a warning message will be displayed under the entry fields. You can overwrite the existing photo by clicking the Save button.

    Important: Patient photo files must have an extension of .BMP, .GIF, or .JPG.
3. Click the **Save** button to save the patient photo or attachment to the Patient screen.

To add a carrier attachment:

1. Click the Carrier Attachment tab.
2. Enter carrier ID in the ID field. You can also click the down arrow button to search for the carrier.
3. Enter a description in the Description field.
4. Click the Save button to save the carrier attachment to the Carrier screen.

Zoom Configurations

You can set your own Medisoft Clinical Zoom screen settings using the Medisoft Clinical Zoom - Configuration screen. To access this screen select the **Configuration** option from the Medisoft Clinical **File** menu, or press CTRL+C. Select or enter the configuration information from each of the tabs and when you are done click OK, to save your selected settings. See the **Zoom Configuration Options** section for a complete explanation of the configuration options.

Zoom Configuration Options

The following table offers detailed descriptions of the Medisoft Clinical Zoom screen configurations.

Configurations	Description
Folders and Files tab	
Scan Folder	Enter the scan folder. You can also browse to the location of the Scan folder using the Browse button.
File Prefix	Enter the file prefix for newly scanned images.
Loaded File Handling	
Delete loaded files	Select this radio button to delete files after they have been loaded.
Archive loaded files	Select this radio button to archive files after they have been loaded.
Archive Folder	Select the file where the archived files will be stored. You can also browse to the location of the Archive folder using the Browse button.
Archive Prefix	Select the archive file prefix.
Default Titles tab	
Section	Use this drop-down menu to select the different sections of the note. Once you have selected a section, enter the default title(s) in the corresponding box.
Behavior tab	
Expanding explorer window	Select this option to expand the Explorer Window when you move the pointer over the window. Un-select this option to keep the window the same size, even when you move the pointer over the window.
Expanding image window	Select this option to expand the image window when you move the pointer over the window. Un-select this option to keep the window the same size, even when you move the pointer over the window.
Clear patient/insurance data after save	Select this option to clear the Patient or Insurance data on the main screen after you have clicked Save.
Clear note/attachment data after save	Select this option to clear the Note or Attachment data on the main screen after you have clicked Save.
Default Note Date	

Configurations	Description
Default note date to date of last file in list	Select this option to use the date and time of the last file in the list of selected files as the default note date and time. This date will automatically be entered in the Date and Time fields of the note section.
Default note date to current date	Select this option to use the current date and time as the default date and time. This date will automatically be entered in the Date and Time fields of the note section.
Default note date to last chosen date	Select this option to use the last date and time used as the default date and time. This date will automatically be entered in the Date and Time fields of the note section.
Clear note date	Select this option to clear the note date on the main screen after you have clicked Save.
Requirements tab	
	Select the requirements for the provider's chart sections. These are the sections that will be required on the provider's chart. Default requirements have been pre-selected. To change these requirements or to add new requirements select or un-select the check boxes.

Fields and buttons on the Medisoft Clinical Zoom screen

The following table offers detailed descriptions of the fields and buttons on the Medisoft Clinical Zoom screen.

Field/Button	Description
Folder	When the screen is in browse mode, you can select the folder where your files are stored. Use the **Browse** button to navigate to the folder where your files are stored.
File	When the screen is in browse mode, you can select the file where your document is stored. Use the **Browse** button to navigate to the file where your documents are stored.
Browse button	Use the **Browse** button located next to the **Folder** and **File** fields to navigate to the folder or file where your document(s) are stored.
Scan button	Click this button to open the Medisoft Clinical Zoom – Acquire Scan screen. See the Scan section for a complete explanation of this screen.
Zoom	Select the image's magnification level. The **Zoom** drop-down menu allows you to increase or decrease the selected documents magnification level. To return the document or image to fit in the image window, select the **Fit** option.
Chart Note tab	
ID	Enter the patient's ID. The entered patient will have the note attached to their chart. Once a valid patient ID has been selected, the patient's last name, first name, middle initial, social security number, and birth date will automatically be entered in the appropriate fields.
Lookup button	Click the **Lookup** button to open the Patient Lookup screen. From this screen you can select from a list of registered patients. See the Lookup section for a complete explanation of this screen.
Last Name	Enter the patient's last name.
First Name, MI	Enter the patient's first name and middle initial.
SSN	Enter the patient's social security number.
Birth Date	Enter the patient's date of birth.

Section	Enter the section of the chart the note will be attached to.
Title	Enter the title of the note. You can enter a title, or you can select from a list of pre-configured and recent titles. See the Zoom Configurations section for details.
Date	Select the note's date. You can enter the date, or click the down arrow button to access the calendar. You can configure a default note date using the Zoom Configuration options. See the Zoom Configurations section for details.
Time	Select the note's time.
Providers	Enter or select the provider's you want to link to the note. You can enter up to four providers in the corresponding fields, or you can click the arrow button to open the Provider Select screen. See the Provider Select section for a detailed explanation of this screen.
Note Text	Enter the note's text in the provided **Note Text** box.
Patient Photo tab	
ID	Enter the patient's ID. The selected photo will be linked to the Patient screen. Once a valid patient ID has been selected, the patient's last name, first name, middle initial, social security number, and birth date will automatically be entered in the appropriate fields.
Lookup button	Click the **Lookup** button to open the Patient Lookup screen. From this screen you can select from a list of registered patients. See the Lookup section for a complete explanation of this screen.
Last Name	Enter the patient's last name.
First Name, MI	Enter the patient's first name and middle initial.
SSN	Enter the patient's social security number.
Birth Date	Enter the patient's date of birth.
Patient Attachment tab	
ID	Enter the patient's ID. The entered patient will have the file(s) attached to their patient demographic information. Once a valid patient ID has been selected, the patient's last name, first name, middle initial, social security number, and birth date will automatically be entered in the appropriate fields.

Lookup button	Click the **Lookup** button to open the Patient Lookup screen. From this screen you can select from a list of registered patients. See the Lookup section for a complete explanation of this screen.
Last Name	Enter the patient's last name.
First Name, MI	Enter the patient's first name and middle initial.
SSN	Enter the patient's social security number.
Birth Date	Enter the patient's date of birth.
Description	Type a description of the file.
Carrier Attachment tab	
ID	Enter the carrier ID. The entered carrier will have the file(s) attached to the Carrier Maintenance. You can also click the down arrow button to access the Carrier Select screen. Once a valid carrier ID has been selected, the carrier's name will automatically be entered in the Name field.
Name	Enter the carrier's name.
Description	Type a description of the file.
Save button	Click the **Save** button to save the note, photo, or attachment to the selected section in the chart.
Clear button	Click the **Clear** button to clear the previous note, attachment, or insurance information. You can use the Zoom configuration settings to permanently delete the note, or archive the note. See the Zoom Configurations section for details.