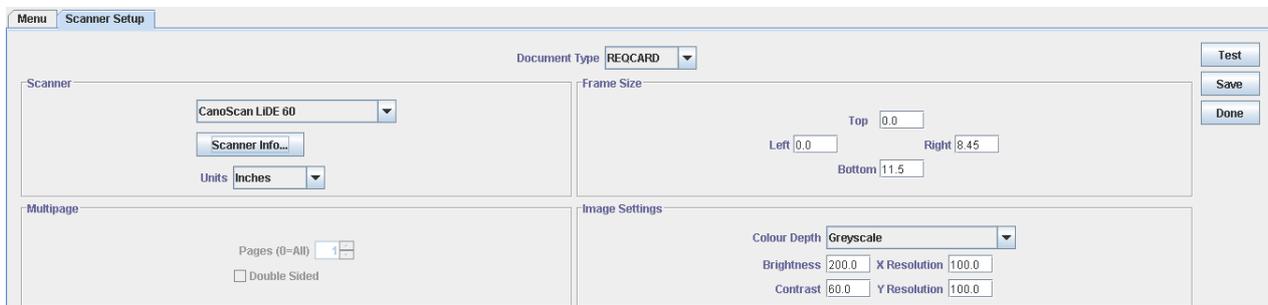


CRIS Document Scanning

Magentus recommend the **Canon CanoScan LIDE range** for use in conjunction with CRIS Document Scanning. If the scanner has not already been set-up, you should attach the scanner to the appropriate PC using the enclosed USB cable and install the software directly from the CanoScan Set-up CDROM following the on-screen instructions.

Please note: It is only necessary to install Canon Scanning Drivers as this ensures that the buttons on the front of the scanner will be disabled as they are not required for use in CRIS. In most cases you should also ignore/close any Windows plug and play messages which appear during the installation process as they are not normally required. It is also important to ensure that you have 'unlocked' the scanner (on the back of the machine) as otherwise it will not work at all.

Set up a scanner for use via CRIS

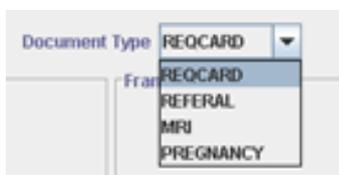


Once the document scanner is installed, you should undertake the following set-up via **Tools > Devices > Scanner Set-Up**

- Place a sample request card into the scanner - for Canon LIDE scanners position the card face-down and upside down at the bottom left-hand side of the scanner.
- Ensure 'Document Type' is [**REQCARD**]
- Click the [**Test**] button, and if necessary, make the appropriate site-specific modifications to 'Frame Size' and 'Image Settings' to fit in with different sizes of document, click the [**Test**] function button again as necessary.
- It's now possible to specify 'Multipage' scanning - by amending Pages to 0 = to scan 'All page' and ticking 'Double Sided' so long as multipage/duplex functionality is supported by the scanner.
- Once you are satisfied with the sample request card click the [**Save**] button.

Setting up different document types

You can also configure the scanner appropriately for different sizes of request cards and other documents such as Referral Letters, MRI questionnaires etc. If this is required you can repeat the process to configure different document type and sizes - i.e. REQCARD = A5 (5.5 inches), REFERAL = A4 (11.5 inches) and amend the 'Bottom' or frame size before clicking [**Save**] for each document type.



Once you have configured all required Document Types click [**Done**] and you are ready to begin scanning.

Please note: Other than changing the 'Frame Size' of the 'Image Type' it is not recommended that the 'Image Settings' should be modified as the colour depth (i.e. greyscale), brightness, contrast and resolution are suitable in most cases. If the image settings are changed this would result in increased file sizes due to the use of colour scanning or increased resolution, or alternatively inferior image quality due to black and white or amended brightness, contrast, or resolution.

Magentus additionally recommend that the default unit of measurement (i.e. inches) is not amended since in most cases the document sizes required are 5.5 inches = A5 and 11.5 inches = A4. Other sizes can be entered but again Magentus recommend the continued use of inches.

If the default unit of measurement (i.e. inches) is changed to any other measurement such as centimetres, picas, pixels, points the resolution will change to match the selected units. This is significant as it will have the effect of substantially increasing the size of scanned images (i.e. dots per centimetre) and therefore the space required to store these via the FTP server.

CRIS document scanning

Once the document scanner has been successfully installed and correctly configured for use via CRIS there are two main areas where CRIS Document Scanning is available for use:

- Scanning a request card (or any required document) at the point of receipt.
- Rescanning or adding images at a later stage.

Scan a request card at the point of receipt

The Document Scanning functionality has been designed to allow a request card (or any required document) to be scanned at the time of inputting the event details on CRIS.

- Search for and select the patient by typing directly into the search fields on the 'Main CRIS Menu' screen or entering their details via a barcode reader.
- Click on the [**New Event**] button via the 'Events' screen and complete the 'Event details' screen. You should then follow the below instructions depending on what type of event you wish to create (i.e. Request, Waiting, Appointment, Attendance etc.).
- Place the request card (or any required document) into the document scanner.
- The request card (or other document) will be scanned as the screen closes (except when scanning from the CRIS [**Diary Viewer**]).

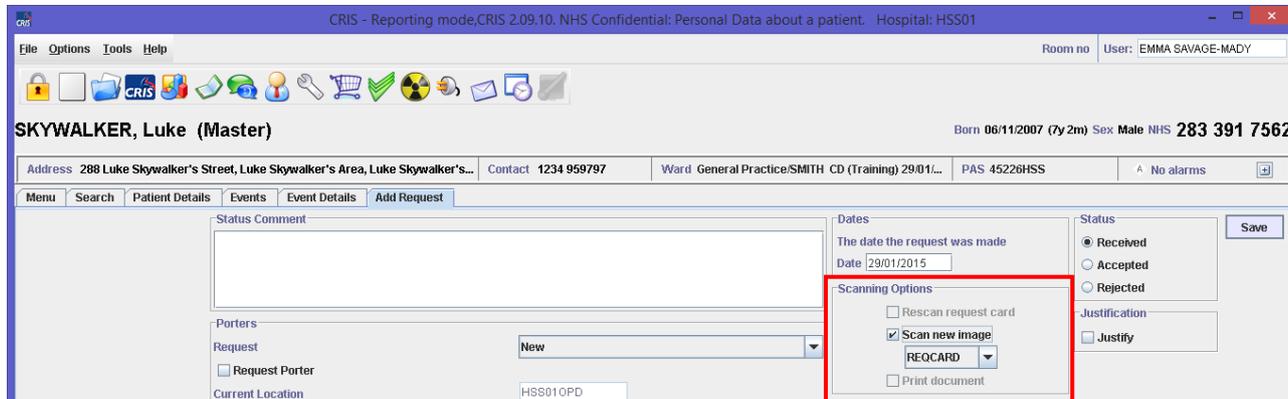
Please note: A scanning icon (see below) is visible at the bottom right-hand corner of the screen whilst the document scanner is scanning, and you should not remove the document whilst this icon is displayed.



The 'Scan Document' option is will only be available if a scanner is attached to the workstation; otherwise it will be greyed out and unavailable. Scanner options are also saved against individual preferences so it is only necessary to tick the 'Scan Document' once and this selection will be remembered unless modified by the user.

Scan a request card when creating a request

Click the **[Request]** button via the 'Event Details' screen to move to the 'Add Request' screen and select the 'Scan new image' tick box in the 'Scanning Options' section of the screen before choosing an image type from the drop-down list as applicable or leaving as the default 'REQCARD'.



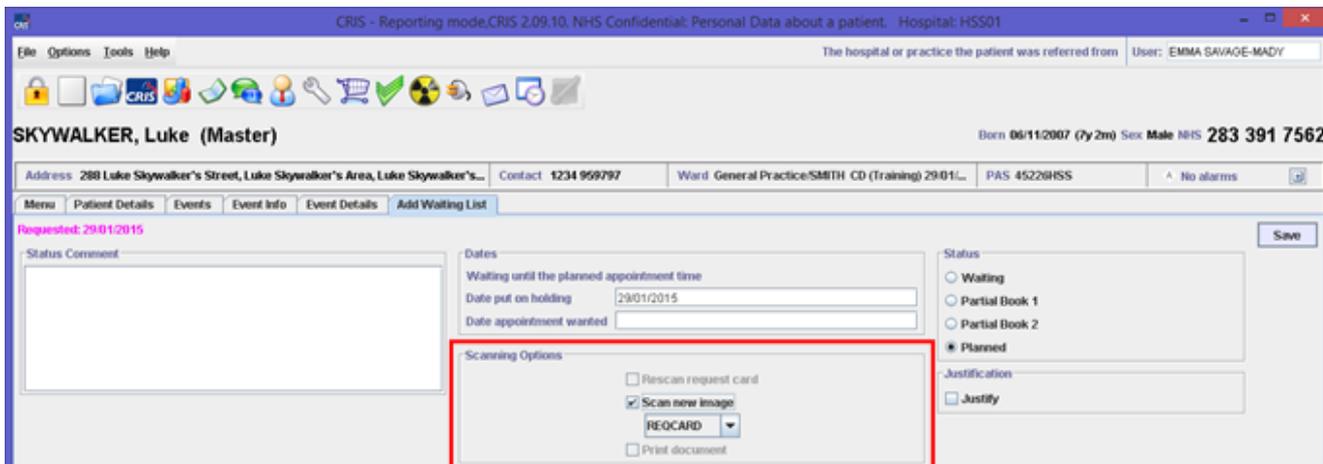
The screenshot shows the 'Add Request' screen for patient SKYWALKER, Luke (Master). The 'Scanning Options' section is highlighted with a red box and contains the following elements:

- Rescan request card
- Scan new image
- REQCARD (dropdown menu)
- Print document

Please note: The 'Rescan request card' option is only available when reloading an event to give you the option to overwrite the original card. 'Scan new image' is however the recommended option for new and existing events as this maintains a full audit trail of any amendments to paper records.

Scan a request card when creating a Waiting List event

Click the **[Waiting]** button via the 'Event Details' screen to move to the 'Add Waiting List' screen. Select the 'Scan new image' tick box in the 'Scanning Options' section of the screen before choosing an image type from the drop down list as applicable or leaving as the default 'REQCARD'.



The screenshot shows the 'Add Waiting List' screen for patient SKYWALKER, Luke (Master). The 'Scanning Options' section is highlighted with a red box and contains the following elements:

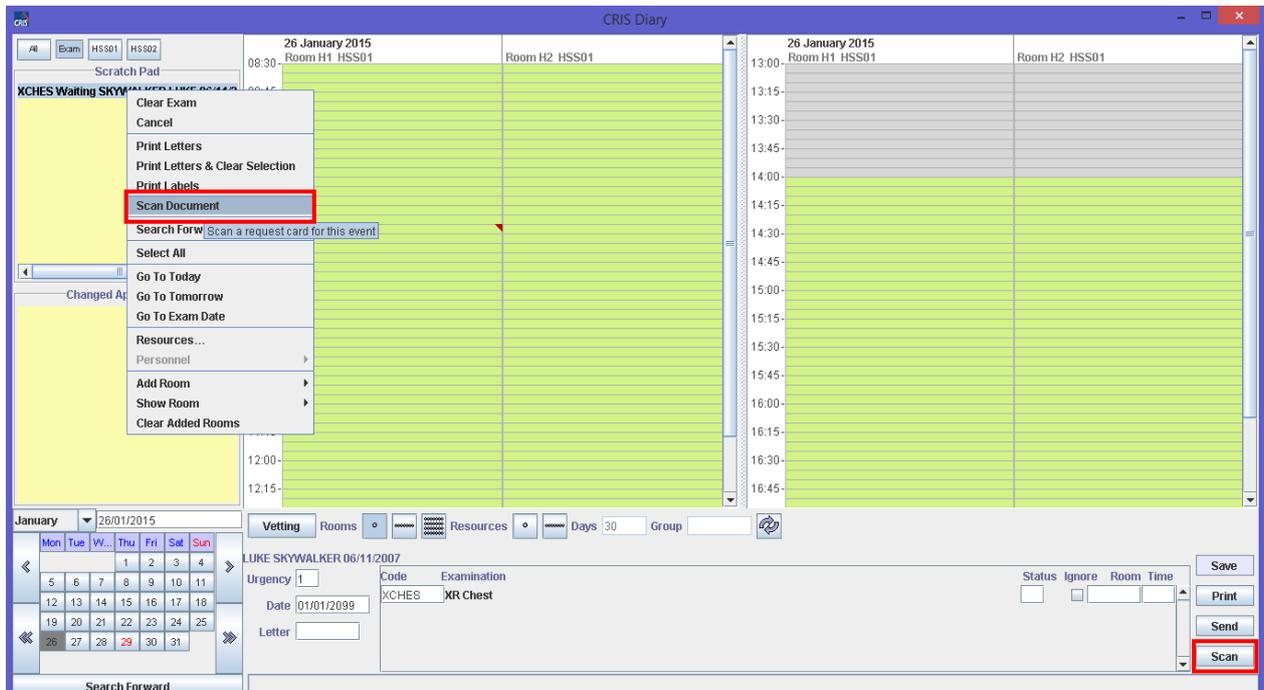
- Rescan request card
- Scan new image
- REQCARD (dropdown menu)
- Print document

Please note: The 'Rescan Request card' option is only available when reloading an event to give you the option to overwrite the original card. 'Scan a new image' is however the recommended option for new and existing events as this maintains a full audit trail of any amendments to paper records.

Scan a request card when creating an appointment (Add To Diary)

Select the patient for whom you wish to scan the request card in the 'Scratch Pad' or the 'Changed Appointments' section of the 'CRIS Diary' screen and choose one of the following methods:

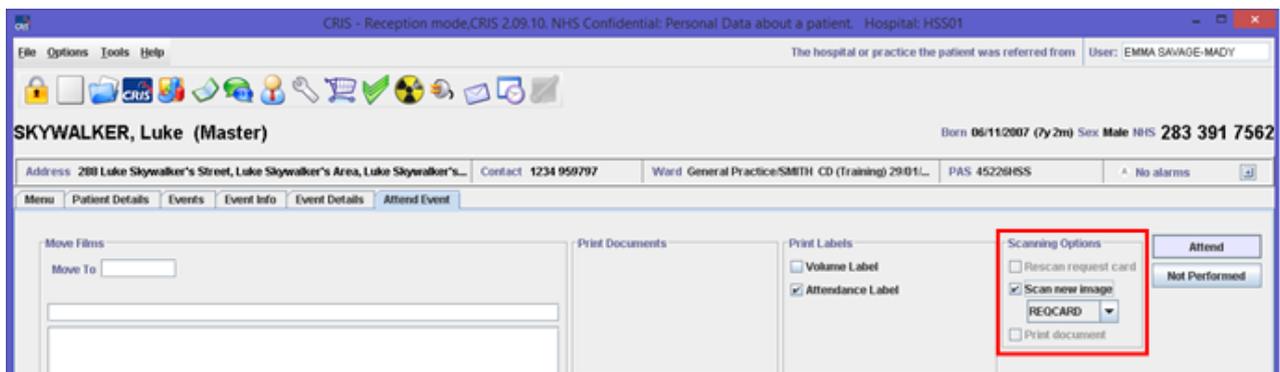
- Right-click to display the drop down menu and left click on 'Scan Request Card'.
- Click the [**Scan**] button on the bottom right hand side of the screen.



Please note: This method scan the REQCARD option as standard. Consequently if you wish to scan a different type or sized document you should do this at an earlier stage in the process, or via the [Documents] options in the 'Event Details' screen.

Scan a request card when attending a patient

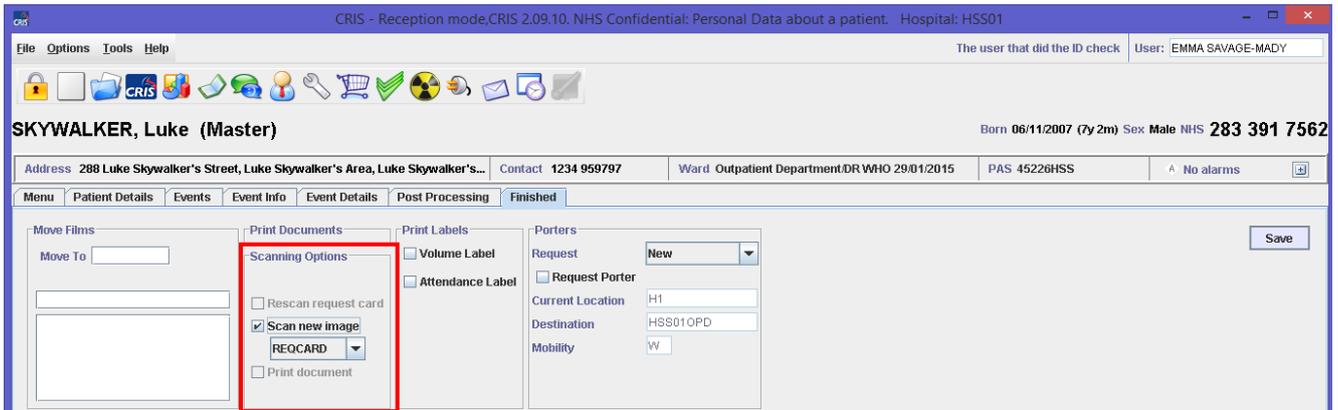
Click the [**Attend**] button via the 'Event Details' screen to move to the 'Attend Event' screen. Select the 'Scan new image' tick box in the 'Scanning Options' section of the screen before choosing an image type from the drop down list as applicable or leaving as the default 'REQCARD'.



Please note: The 'Rescan Request card' option is only available when reloading an event to give you the option to overwrite the original card. 'Scan a new image' is however the recommended option for new and existing events as this maintains a full audit trail of any amendments to paper records.

Scan a request card when post-processing

Click the [**Process**] button via the the 'Event Details' screen to move to the 'Post Processing' screen. Select the 'Scan new image' tick box in the 'Scanning Options' section of the screen before choosing an image type from the drop down list as applicable or leaving as the default 'REQCARD'.



The screenshot shows the CRIS software interface for patient SKYWALKER, Luke (Master). The 'Post Processing' screen is active, and the 'Scanning Options' section is highlighted with a red box. In this section, the 'Scan new image' checkbox is checked, and the 'REQCARD' dropdown menu is visible. Other options include 'Rescan request card' (unchecked) and 'Print document' (unchecked). The 'Porters' section on the right shows 'Request' set to 'New', 'Current Location' as 'H1', and 'Destination' as 'HSS01OPD'.

Please note: The 'Rescan Request card' option is only available when reloading an event to give you the option to overwrite the original card. 'Scan a new image' is however the recommended option for new and existing events as this maintains a full audit trail of any amendments to paper records.

Viewing scanned documents/request cards

Scanned documents can be viewed in various screen using the below processes:

Via the event details screen

- From the patient 'Events' screen, highlight the event you wish to view the scanned images for and click [**Change**] to load the 'Event Details'.
- Click the [**Documents**] button located on the right-hand side of the screen to display any associated images before returning to the previous screen, or pressing [F5] to clear the patient.

Via the report editor

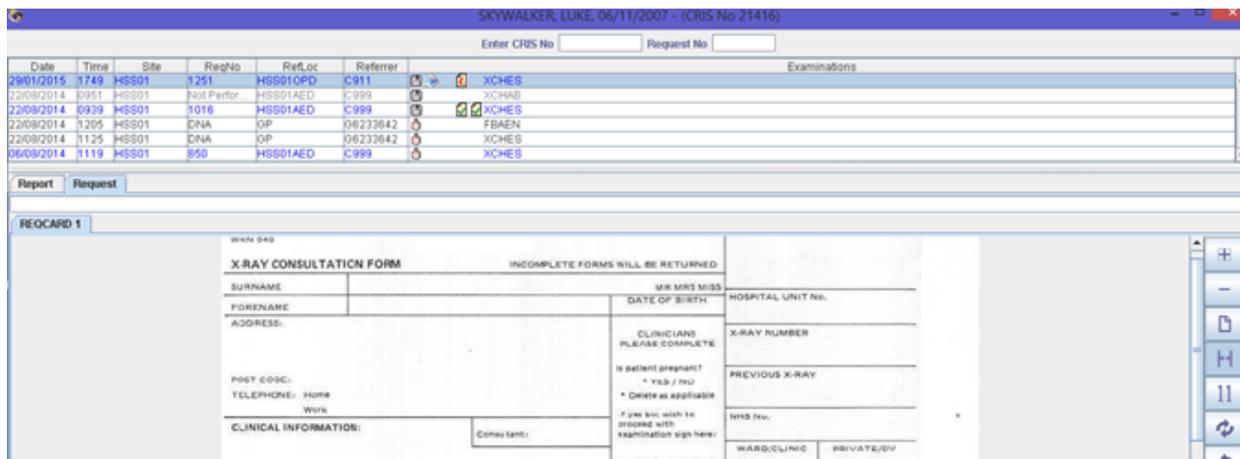
- Click the [**<<Request**] button located on the right hand side of the screen via the Report Editor.
- This is a toggle button which means the REQCARD image panel will remain in the Report Editor for all subsequent reports until the button is clicked again to hide the request card.

Via the dictation screen

Any scanned documents/images will automatically be displayed as the 'Dictation' screen is loaded.

Via the report viewer

You can also view any scanned documents/images in the Report Viewer  [F12] by clicking the 'Request' tab.



The screenshot shows the CRIS software interface. At the top, there's a title bar for 'SKYWALKER, LUKE, 06/11/2007 - (CRIS No 21416)'. Below it, there are input fields for 'Enter CRIS No' and 'Request No'. A table lists several examinations with columns for Date, Time, Site, RegNo, RefLoc, Referrer, and Examination. The 'Request' tab is selected, showing a 'REOCARD 1' for 'X-RAY CONSULTATION FORM'. The form includes fields for patient details (Surname, Forename, Address, Post Code, Telephone), clinical information, and examination details (Date of Birth, Hospital Unit No., X-Ray Number, Previous X-Ray, NHS No., Ward/Clinic, Private/Qu).

Viewing options

Whenever a document/image is loaded in CRIS it is accompanied by the following standard viewing options:

- | | |
|---|--|
|  | Click this icon to zoom in or left click mouse and drag to zoom in and out. |
|  | Click this icon to zoom out or left click mouse and drag to zoom in and out. |
|  | Fit to page |
|  | Fit to width of the screen |
|  | Fit to actual size. |
|  | Rotate clockwise |
|  | Rotate anticlockwise |
|  | Save image to file |
|  | Delete image |

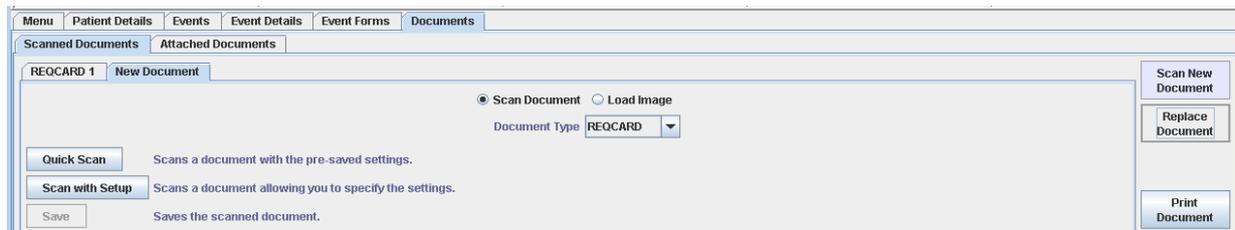
Please note: From 2.09.10r onwards it is also possible to double click any scanned image to access a full screen view.

Adding additional images, rescanning, and attaching documents

CRIS Document Scanning has also been designed to enable documents/images to be added later, rescanned or to scan multiple documents against an event – i.e. Changes to request cards, and the addition of signature forms, referral letters, patient questionnaires, or annotated forms.

To add an additional image

- Place the request card (or any required document) into the document scanner.
- Load the patient by typing directly into CRIS or enter their details using a barcode reader.
- Open the Event (i.e. Request, Waiting, Appointment or Attendance etc.) and click the [**Documents**] button located at the right-hand side of the 'Event Details' screen.
- If this event already has a scanned request card it will be displayed at this point.
- Click the [**Scan New Document**] function button – choose the correct type of image you wish to scan from the 'Document type' drop down list and click the [**Quick Scan**] button.



- The scan will be performed, and the image will be displayed. To save the image click the [**Save**] button. If applicable repeat the process until all documents have been scanned. Then press [F5] to clear the screen or return to the 'Event Details' screen by clicking the 'Event Details' form.

Rescan/ replace an image

If you want to overwrite/copy over the existing image, click on the [**Replace Document**] button, the existing image will be deleted and replaced with the new one.

Please note: Magentus would recommend 'Scan new Document' over the Replace Document option as this maintains a full audit trail of any amendments to paper records.

Delete an image

Right click on the scanned image to display the following options:

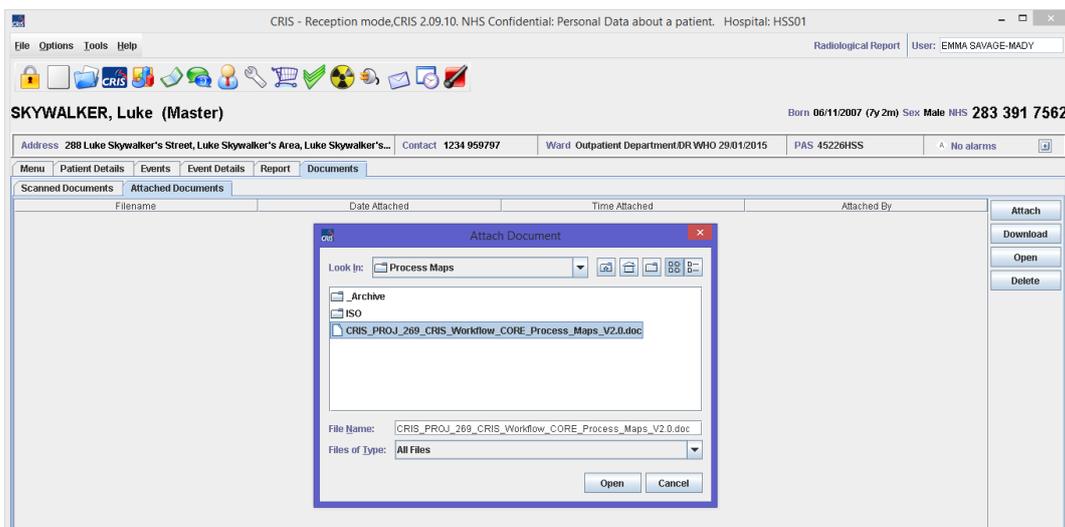
- Left click on 'Remove Image from store' in the list.
- A warning message will be displayed to indicate the image will be permanently deleted. To proceed select [**OK**] and the image will be deleted.

Please note: If a copy of the request card is required, please contact your System Manager who will need to enable this option by enabling the appropriate XR (Trustwide setting), XRS (Site-wide setting) or XRT (Terminal specific setting) via CRIS tables and enabling RECEPT.PrintRequestCard = Yes.

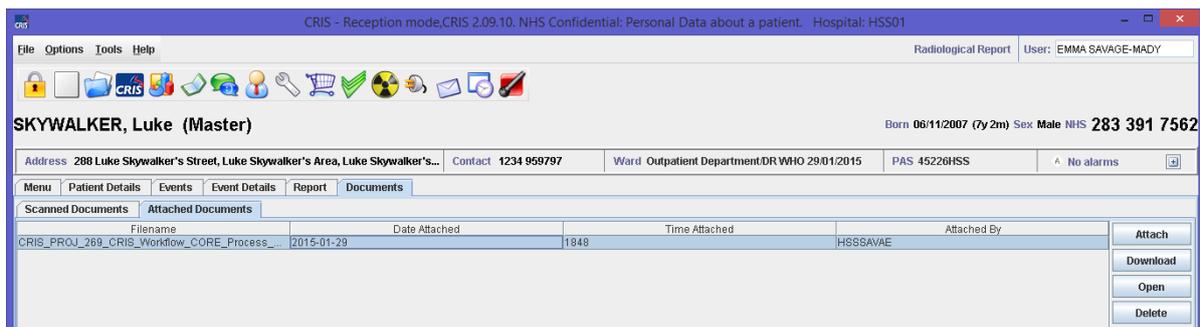
Attach a document

The following document types can now be attached against an event within CRIS: PDF, DOC, XLS and JPG files.

- Search for and select the patient from the 'Main CRIS Menu' screen.
- Click on the required event in the 'Events' screen. Click on the [**Change**] button.
- Select the [**Attached Documents**] screen adjacent to the 'Scanned Documents' screen at the top of the screen.
- Click the [**Attach**] function button on the right side of the screen. The 'Attach Document' window is displayed.



Navigate to the document you want to save then click [**Open**]. Once the document has been uploaded, it will be displayed on the screen as follows:



- To view an uploaded document, select from the list and choose [**Open**] function button. This will then load the appropriate software from your computer to view the image/document.
- It is also possible to download/export a copy of the document by selecting the [**Download**] function button which will allow you to specify where you wish to save the file.
- If required, it is also possible to remove an attached document using the [**Delete**] button.

Please note: The Attached Document functionality requires a CRIS license to access the functionality.

Import/export of request cards/documents for use in patient correction

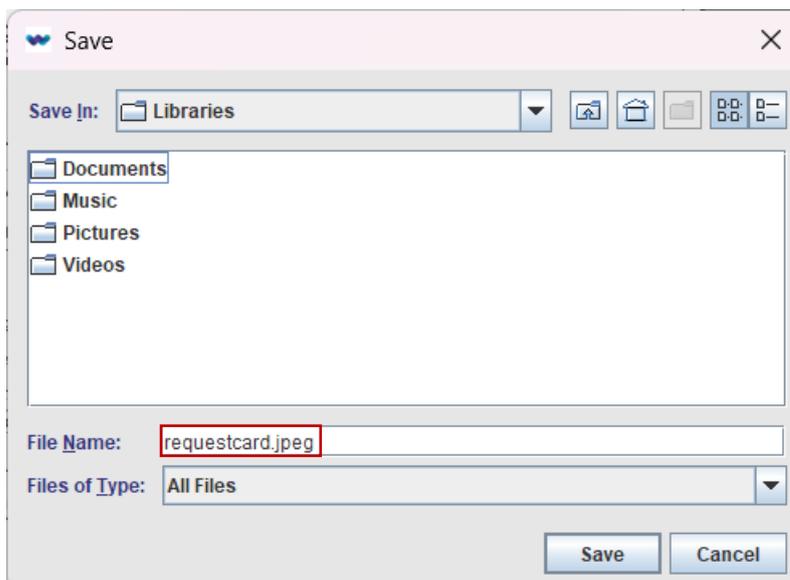
CRIS also enables the import and export of documents via the Scanned Documents screen which is useful in the event of patient correction where an event has been entered against the wrong patient record in error. As the 'Scanned Documents' are displayed by default in all relevant Event screens this may be a preferable process to using the Attached Documents screen for vetting and reporting purposes.

Export an image from CRIS to your local hard drive

- Search for and select the required patient. Click on the required event in the 'Events' screen.
- Click on the [**Change**] button followed by the [**Documents**] button.
- Hover over the required document and right-click.
- Select 'Save to local disk' from the displayed list.



- From the displayed 'Save' window navigate to the required save location, enter an appropriate filename followed by **.jpeg** as below.



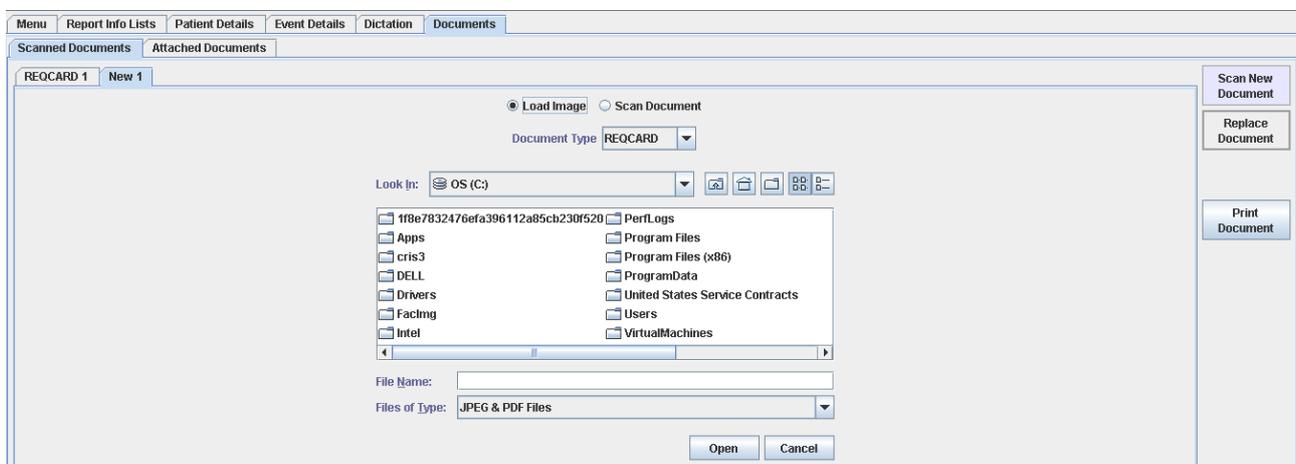
- Press the [**Save**] button to complete the action.

Import an image into the CRIS system

- Search for and select the required patient. Click on the required event in the 'Events' screen.
- Click on the [**Change**] button followed by the [**Documents**] button.
- Click on the [**Scan New Document**] button on the right side of the screen.
- Select the 'Load Image' radio button



- Having clicked [**Load image**] the following box will appear to enable you to choose the location of where the image is saved. If you have saved the image as a .jpeg this will be immediately visible or alternatively if you did not specify a file type it will be necessary to click 'Files of Type' and choose 'All Images'.



- Highlight the required file and click [**Open**] and the file will automatically save against the Patient Record. As this is patient identifiable data, care should be taken that the image, once uploaded to CRIS, is completely removed from its previous location.

Document Scanning Module Access Settings

CRIS licenses

Attaching documents via the CRIS System requires a licence per file type (i.e. DOCATTACHDOC, DOCATTACHJPG, DOCATTACHPDF, DOCATTACHTEXT, DOCATTACHXLS etc.) You can check if a valid 'DOCATTACH' Module Code has already been applied to the system via TABLES > SYSTEM TABLES > LICENSES. If licenses are not present this can be requested via your Client Manager or the Helpdesk.

XR settings

There are several XR Settings which are required to set-up the FTP and storage of documents /images from to and from the CRIS server. However these will usually be configured by Magentus at the time of deployment and should not be modified except if requested to do so by the Magentus helpdesk.

Printing request cards should however be configured by the System Manager via CRIS Tables > System Tables > XR Settings and the appropriate XR (Trustwide setting), XRS (Site-wide setting) or XRT (Terminal specific setting) and enabling RECEIPT.PrintRequestCard = Yes.

Security settings

The following security settings are required in conjunction with scanning and attaching documents/images:

Setting	Description
GENERAL.SCAN	Allows users to scan
GENERAL.RESCAN	Permission to rescan request cards
GENERAL_DELETE_REQ_CARD	Allowed to delete request cards
GENERAL.DOC_ATTACH	Allow attaching documents
GENERAL.DOC_DELETE	Allow deletion of attached documents

Document Control

Title	CRIS Document Scanning
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File Reference: CRIS_CRIB_CM_268_Document_Scanning

Effective date: CA - 14/05/2024

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Owner	Magentus Training Manager	Date Created	18/06/2013
File Reference	CRIS_CRIB_CM_268_Document_Scanning_MAG_V4.0		
Product Version	2.09.10r onwards		
Change History			
Issue	Date	Author	Details of Change
D1.0	18/06/2013	Elena Azzini	Draft Issue For Internal Review
D1.1	12/11/2013	Elena Azzini	Format Changes.
D2.0	15/09/2014	Louis Wilkinson	Review
V2.0	10/01/2015	Emma Savage-Mady	2.09.10p issue
V3.0	29/01/2015	Emma Savage-Mady	2.09.10r issue
D4.0	14/05/2024	Christine Anthony	Rebranded to Magentus.
V4.0	07/06/2024	Danny Venton	General review
Reviewed by		Date	
Authorised by		Date	
Review Date			