SARASOTA
MEMORIAL
HEALTH CARE SYSTEM ®

A decision as important as *life* itself.

Introducing SCM On-Line Chart Completion

**A streamlined process that allows chart completion
from any access point to SCM**

No need to go to HIM Department to complete charts

Access paper and electronic records on-line!

<u>Instructions For Office Staff:</u>

Printing requested documents

• **Sign-in to SCM**

• **Select Patient visit**

• **Find Document**

    - For documents dictated and transcribed, select the DOCUMENT tab

    - For documents previously "on-paper", select SCANDOC tab

• **Printing from the "Documents" tab**

    Click on Document tab

    Highlight the desired document.

    Right click and select Print Selected Documents

    In Report Selection window, select Print Selected Documents.

    Click the Print button

Note: For additional information on setting printing criteria, refer to the On-Line Help.

• **Printing from the "ScanDocs" tab**

    Select SCANDOC tab

    Select CHART tab

    Click on desired category to expand and view all documents

   On the viewer toolbar, select the icon to size view as desired

    Scroll through pages, if necessary, to find desired view

    Click on the Printer Icon

Instructions for Physician Chart Completion:

- **Sign-in to SCM**

- **Select a Patient from the Current List:**

- **Click on the "ScanDocs" tab**

- **Click on the "Dashboard" tab at the upper left side of the display window to bring up chart deficiencies.**

- **Pie chart identifies number and type of outstanding deficiencies.**
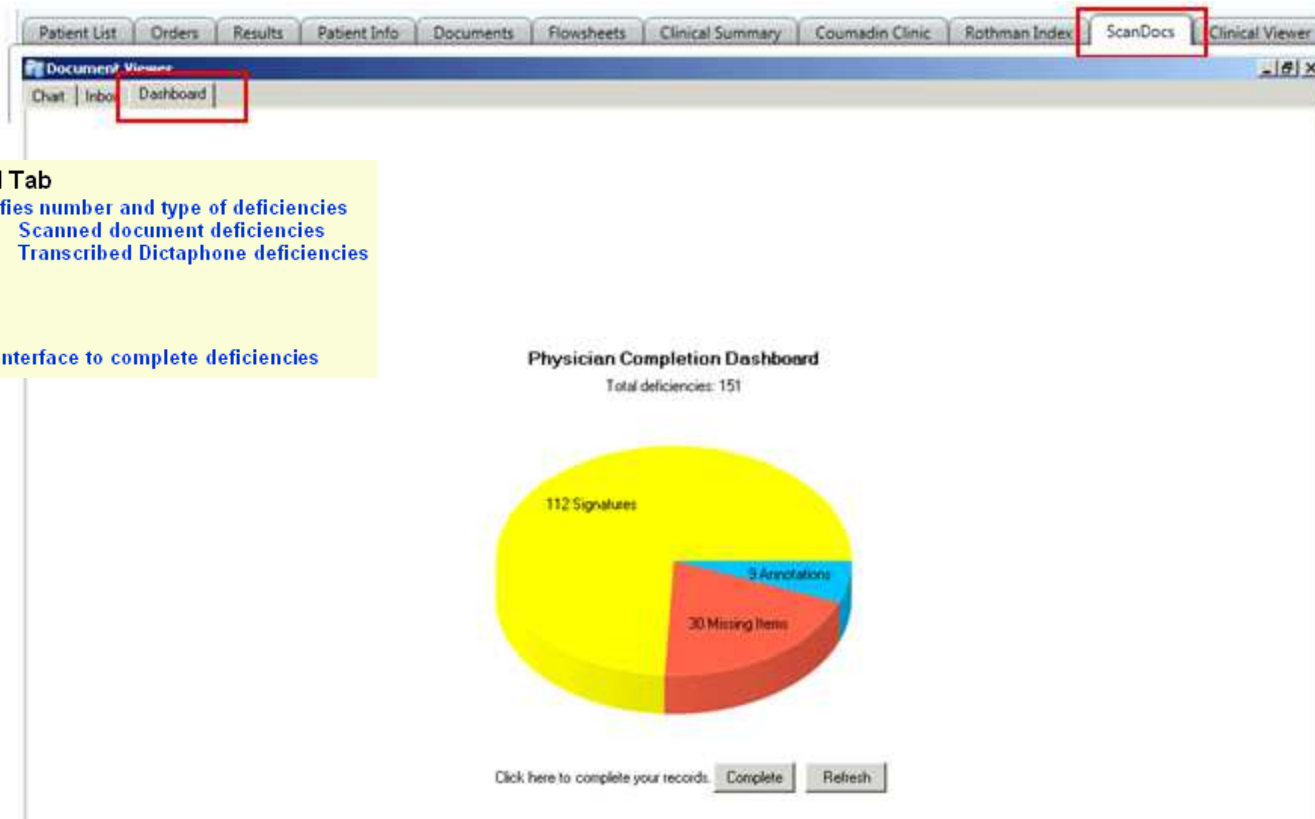
Dashboard Tab
- Identifies number and type of deficiencies
  - Scanned document deficiencies
  - Transcribed Dictaphone deficiencies

Inbox Tab
- User interface to complete deficiencies

Physician Completion Dashboard
Total deficiencies: 151

112 Signatures
9 Annotations
30 Missing Items

Click here to complete your records. Complete Refresh

For Scanned documents and Transcribed Dictaphone documents.

SCM Orders & Text Notes are NOT included here.

Click here to complete your records: Complete | Refresh
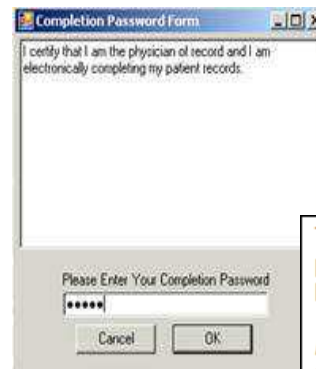
• **Click the "Complete" button to complete deficient records.**

(This will display a list of incomplete charts in the column at the left of the Inbox tab.)

Completion Password Form

Completion Form requires a completion password for the <u>first signature only</u>.

This password is session-based so if the physician logs out of SCM
the physician will be prompted for the completion password a second
time. The physician is not prompted for the password until the Complete
Deficiency button is clicked the first time.

| Complete Deficiency | Return Deficiency | Edit Text | Add Addendum | Goto Chart |

The completion password is defaulted to the physician's user name. It does not expire but can be changed at any time by the user.

For security purposes, it is recommended that the password be changed the first time physician signs in.

Changing your Completion password

• **The Completion password is changed by the physician:**

1. Highlight any deficiency

2. Right click

3. Select change password

4. Type in your new password

5. The next time you log in your
new password will be effective.
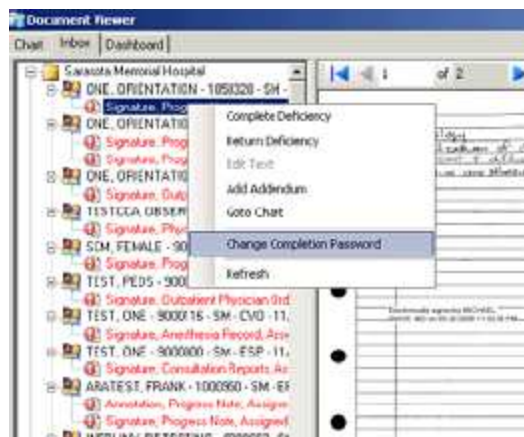
Completing Deficiencies

• **Click the first deficiency on the list. The document and deficiency will appear. Complete the deficiency as needed. Documents from SCM will be listed as "Interface".**

The red box indicates where your signature will display on the document

• **Click the Complete Deficiency button. A green check mark replaces the red exclamation next to the deficiency.**

• **If deficiency is a signature, enter password to sign. There is a short delay before the signature appears.**

• **If deficiency is an annotation, enter text in box that comes up, and click complete when finished.**

• **If deficiency is an addendum, type the addendum (a new page will be displayed), then click Save or Save and Sign. To stop adding the addendum, click Cancel. To delete the addendum, click Delete. To remove edits to the addendum, click Remove.**

• **If deficiency is incorrectly assigned, click Return Deficiency.**
   Enter a comment explaining the reason for returning the deficiency.
   Either select a typed comment or enter a comment. Click Return Deficiency.
   The system places a green check mark next to the deficiency in the Inbox and goes to the next deficiency for completion.

• **Click on next deficiency on list. As each deficiency is completed, it will show on the list with a green check mark next to it.**
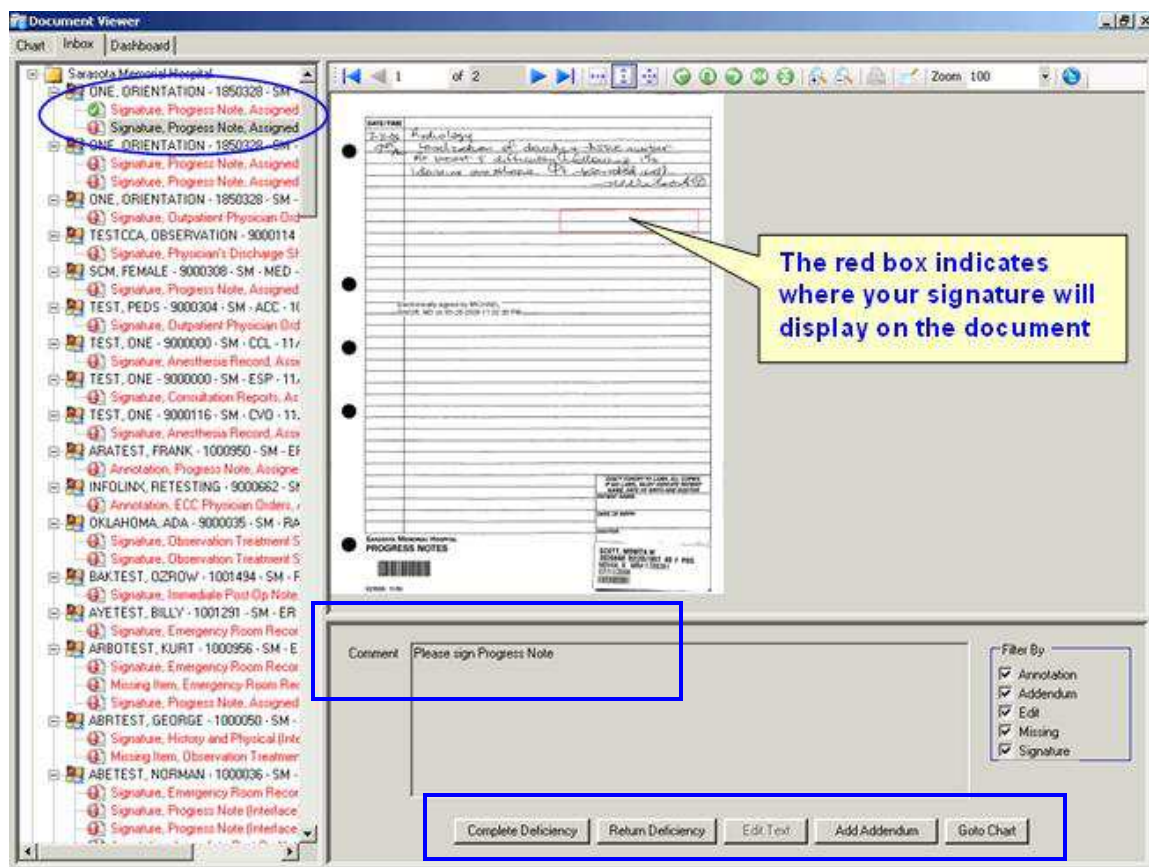
External Deficiencies

- The Action Buttons below are deactivated for External Deficiencies.
- The Inbox tab also includes a listing of SCM deficiencies.
    - These deficiencies are listed under External Deficiencies folder.

Deficiencies in Red are the oldest deficiencies that are nearing the delinquent level and should be given priority in the completion Process.

Incomplete transcribed documents need to be signed in Signature Manager within SCM.

The Comment reminds the physician to complete this signature in SCM

When all (scanned) deficiencies are complete

return to SCM to complete your Electronic Signatures.

• **Highlight a patient on the "Current List:" to activate the SIGNATURE MANAGER icon.**

• **Double click SIGNATURE MANAGER icon to review and sign dictations and orders in SCM.**

Signature Manager

• **All Verbal/Telephone Orders must be signed within 48 hrs**

• **When you log on SCM for the first time each day you will be brought to signature manager**

• **You can sign all Orders and Documents or filter to only sign "Orders"**

• **The data will refresh every 24 hours**

• **Click on "Item Type Filter"**
• **Uncheck Documents and Tasks**

• **Click Get List**
• **Enter Password to Sign Orders (only 200 at a time)**

Questions or Issues?

- **System Problems:** SMH Call Center 917-6107

- **Clinical Business Systems:** Karen Csaszar 917-2616

- **Physician Relations & CME Specialist:** Terri Levanti 917-5959

- **Questions - Physician Reps:** Susan Warling, 917-1132
  Joyanne Fathauer, 917-1119