



Utah State Developmental Center

"a statewide resource center for people with disabilities while promoting opportunity through choice and outcome based support."

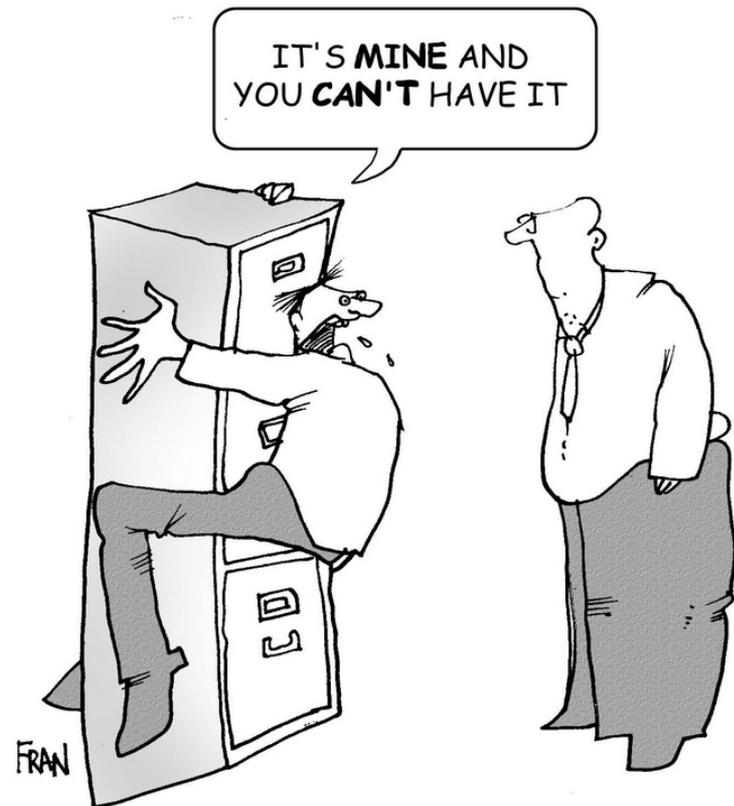
How we started---Going Paperless



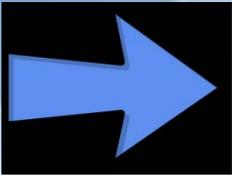
- USDC started a Workflow Committee in 2011
- This committee was formed with different professions for the implementation of going paperless campus wide.
- Efile presented a power point to the committee After many meetings and consideration of using Efile cabinet, the committee felt this would benefit the facility.
- Then the process of approval to purchase Efile began.

Spring 2012

- It was a process
 - Training
 - IT Department
 - Planned the structure of folders
 - Prioritized what needed scanning first
 - Approval of new retention through State Archives

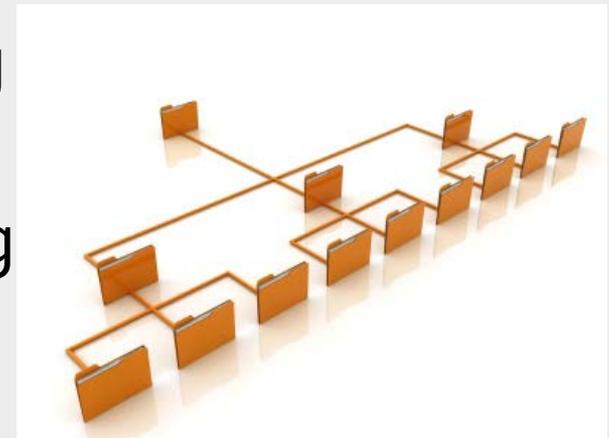
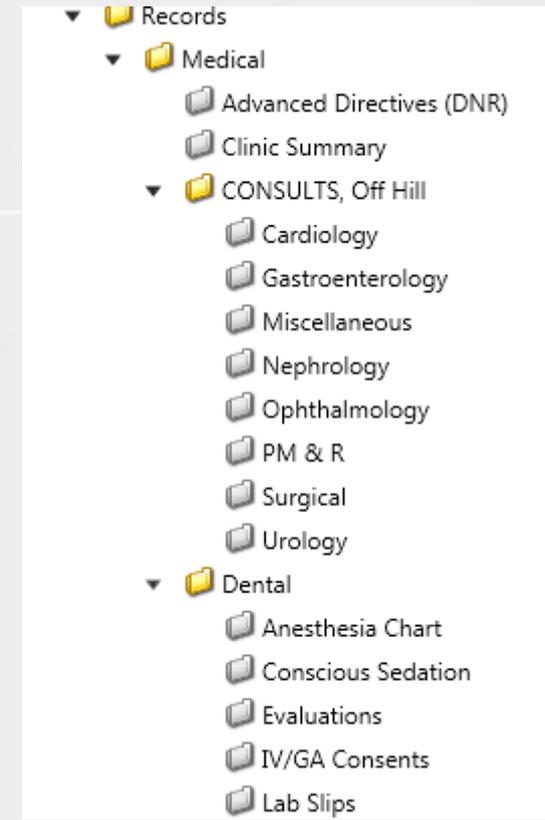


MORRIS WAS FINDING IT MORE DIFFICULT THAN MOST TO ADJUST TO THE CONCEPT OF A 'PAPERLESS' OFFICE



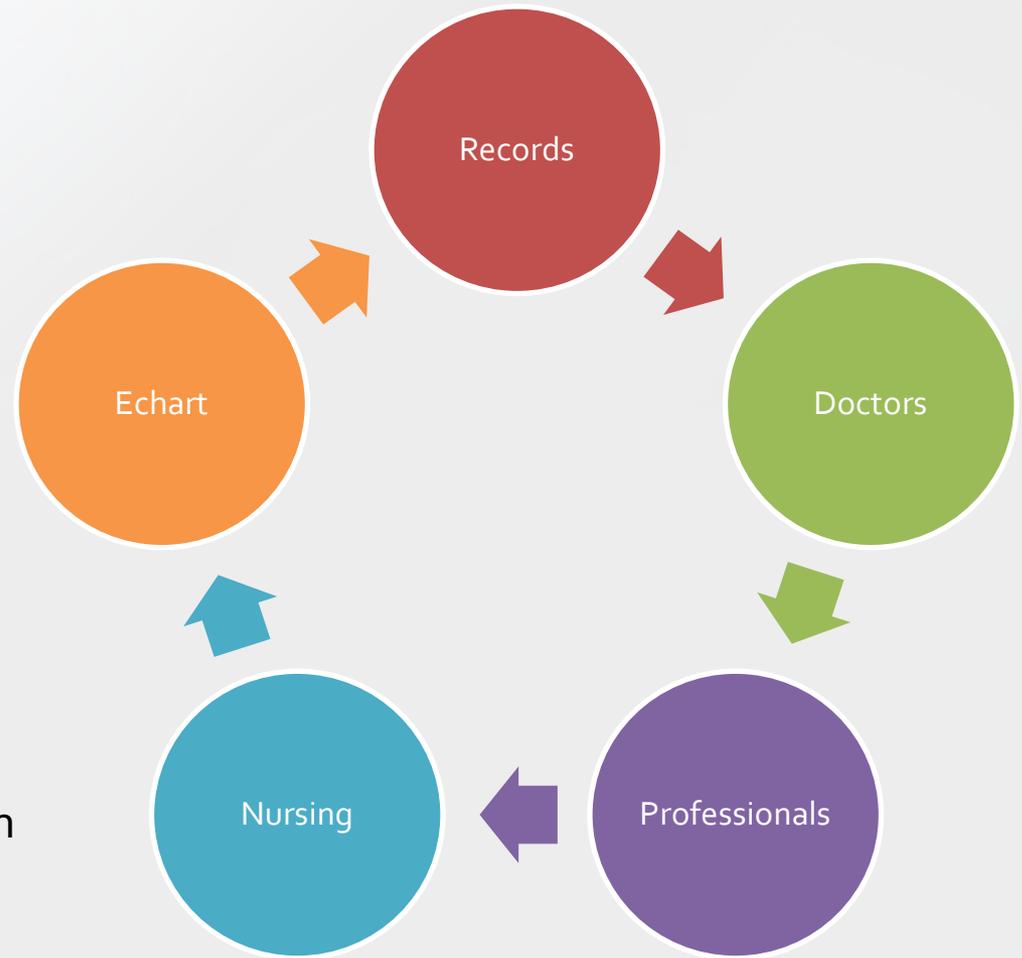
Folder Structure

- We put an initial folder structure, much like our binder structure for our records department
 - There are a lot of possibilities and this part of how we structured our Medical Folders
- We are in the process of changing our “folder structure” for our Medical documents after meeting with our Medical professionals. About 1/3 way through.



See Information

- Aids in Treatment
- Retrieving Information for requests
- Different Access Levels
- ASAP Documents
- Navigating Users
- Need More Training
 - Efile did a mass training several days in a month so everyone could attend.
 - We have several nurses and Doctors that would benefit from being able to use Efile.



Easy Search—OCR Recognition

- Optical Character Recognition Software



Optical character recognition

From Wikipedia, the free encyclopedia

Optical character recognition, usually abbreviated to **OCR**, is the [mechanical](#) or [electronic](#) conversion of scanned or photographed [images](#) of typewritten or printed text into machine-encoded/computer-readable text. It is widely used as a form of data entry from some sort of original paper data source, whether passport documents, invoices, bank statement, receipts, business card, mail, or any number of printed records. It is a common method of digitizing printed texts so that they can be electronically edited, searched, stored more compactly, displayed on-line, and used in machine processes such as [machine translation](#), [text-to-speech](#), key data extraction and [text mining](#). OCR is a field of research in [pattern recognition](#), [artificial intelligence](#) and [computer vision](#).



Name	Stored	Modified
 smith, john	4/21/2014 1:34:44 PM	4/21/2014 2:55:23 PM

Advanced Search

See what individual users have stored

- Search for a document that was stored
 - By type
 - By date
 - By name in text
- Supervisors can see incoming information readily by searching the date or user
- Quality Assurance
 - Can easily edit
 - Check out document in Adobe, Redacting Option
- Training
 - You can view how new user is storing information.

The screenshot shows an 'Advanced Search' window with the following sections:

- Dates:** Range: 10/01/2014 - 10/01/2014, All dates, Type: Stored
- Documents:** Text in name: [input], Full text search in files: [input]. Cabinets to search in: Building Coordinators, Individuals Current, Individuals Discharged, Individuals Expired, Individuals Probable Admissions, Individuals Respite, Individuals Respite Discharged, Medical Disclosures, Medical Scanning. Search for: Drawers, Folders, Files.
- Users:** Administrator, Nathan, Kristy (deleted), John, Spencer Hall, Joseph Cook, Ruth Timothy, Mark Forbes, Sandy Baxter. Type: Stored
- Profiles:** All profiles dropdown. Fields: Activity, Address, Admit Date, Approval Date, Box #, Building, City, Company Name, Contact name.

Buttons: Cancel, Search

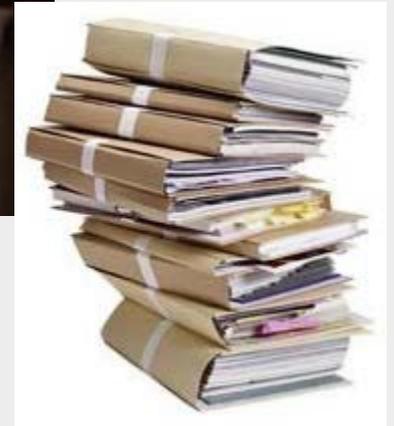
Like Magic

I wish...

Our biggest challenge is digitizing all of our documents.



...you have to get it into EFile



Current Individuals

- We have 202 individuals that we provide 24/7 ongoing care for.
- There are a lot of documents because of this.
 - Examples
 - Shift Logs, Bed Checks, Overlap
 - Professional Evaluations
 - Daily Progress Monitoring
 - Treatment Sheets
 - Medication Administration
 - Current Habilitation Training
 - Medical Evaluations
 - Schedules
- Most individuals have 16-22 binders each, after scanning we can get them down to 2 binders.



Prioritize and Sort



- We have to prepare documents to scan
 - Rice paper sometimes needs to be copied.
 - Redacting information before storing to Efile
 - You can do this after
 - There is information that we redact
 - Sorting it in date order
 - Separating documents to store individually
 - Prioritize Projects
 - We have a weekly calendar that we follow thru several projects with example:
 - Monday—Prep Day
 - Tuesday—Quality Check Day
 - Wednesday--ITS



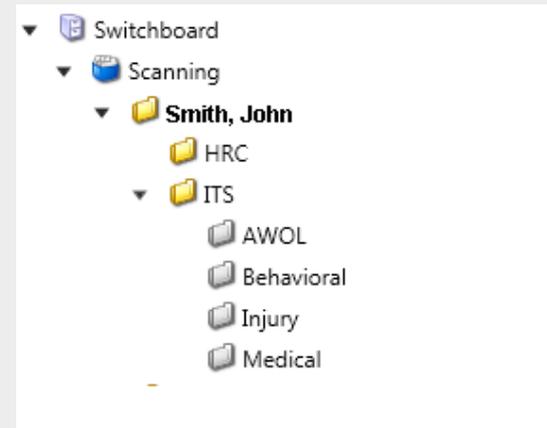
WHEN YOU
PRIORITIZE,
ALL THE
IMPORTANT STUFF
GETS DONE.

We Need a Project Aid not a Lookie Lou

- We wanted to keep information secure, by not allowing access to other files or information
 - We gave them their own cabinet to work with that mirrored a small portion of our current individuals filing.



Then a user from the records department takes minimal time to refile these into our current individual file.

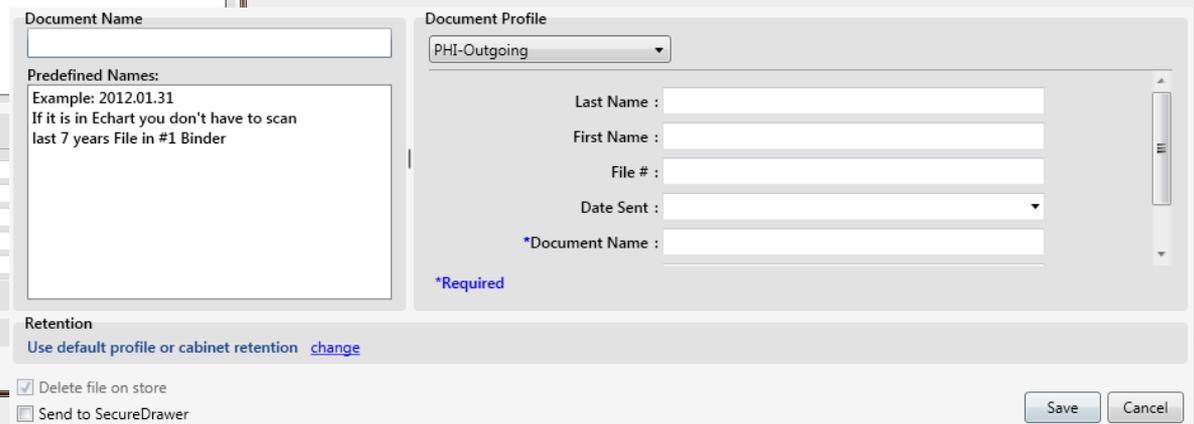
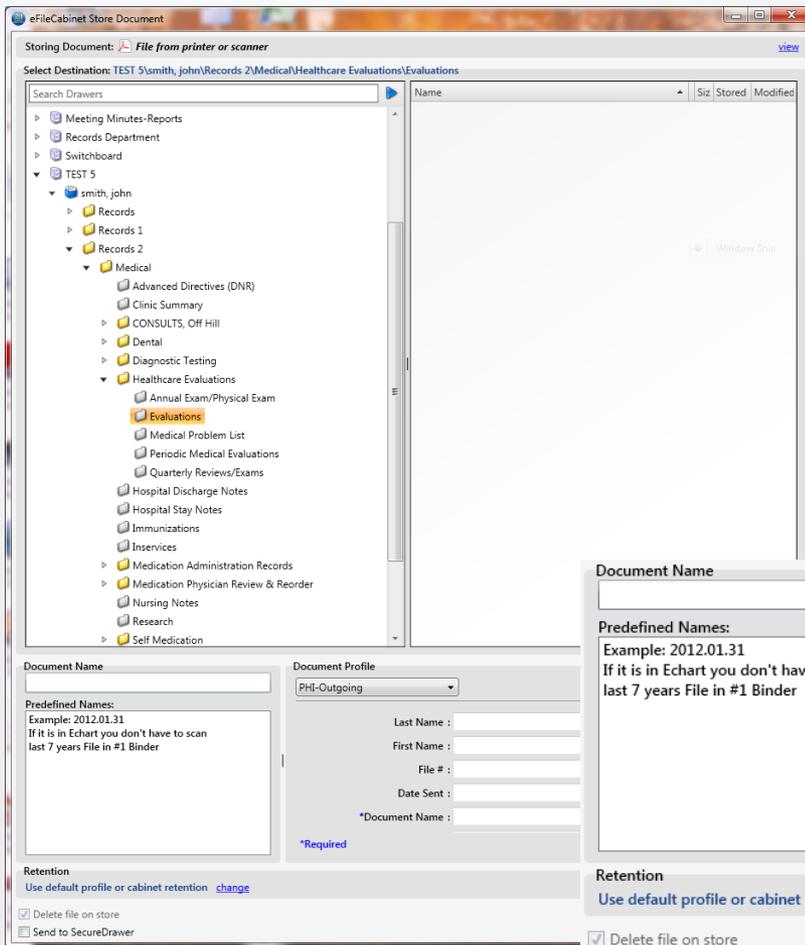




Predefined Names



1. Reminds users how to store it and what to do with it after storing.
2. Displays how to name the document
3. Predefined wording that you don't have to type out each time
4. Documents are stored with similar qualities so they are easy to retrieve and find



Home View SecureDrawer RightSignature

Store Scan Workflow Edit Profile Edit Security Delete Ref

New Actions

- Cabinets**
- Search Drawers
- ▶ Building Coordinators
 - ▶ **Individuals Current**
 - ▶ Individuals Discharged
 - ▶ Individuals Expired
 - ▶ Individuals Probable Admissions
 - ▶ Individuals Respite
 - ▶ Individuals Respite Discharged
 - ▶ Medical Disclosures
 - ▶ Medical Scanning
 - ▶ Meeting Minutes-Reports
 - ▶ Records Department
 - ▶ Switchboard
 - ▶ TEST 5
 - ▶ USDC History



eFileCabinet 2014 - Amy Lewis

Home View SecureDrawer RightSignature Administration Utilities News, Events & Tips

Store Scan Workflow Edit Profile Edit Security Delete Refresh Cut Copy Paste Advanced Search New Drawer New Folder Apply Template Special Offers

New Actions Clipboard Actions Search Folder / Drawer Actions eFileCabinet News

- Cabinets**
- Search Drawers
- ▶ Individuals Respite
 - ▶ Individuals Respite Discharged
 - ▶ Medical Disclosures
 - ▶ Medical Scanning
 - ▶ Meeting Minutes-Reports
 - ▼ Records Department
 - ▶ Audits
 - ▶ AWOL Switchboard Book
 - ▶ Census
 - ▶ Cold Filing
 - ▶ Deaths
 - ▶ Forms
 - ▶ Goals & Accomplishments
 - ▶ GRAMA Record Requests
 - ▶ HIPAA
 - ▶ HITECH
 - ▶ Medicare D
 - ▶ Microfilm
 - ▶ Miscellaneous
 - ▶ NOTES
 - ▶ People 1st
 - ▶ Purchases
 - ▶ Recreation
 - ▶ REDACTION
 - ▶ References
 - ▶ Regence Pharmacy
 - ▶ Releases
 - ▶ Requests
 - ▶ Retention
 - ▶ Subpoenas
 - ▶ Vocational Rehabilitation
 - ▶ Volunteers
 - ▶ Switchboard
 - ▶ **TEST 5**
 - ▶ **USDC History**

- ▶ Cabinets
- ▶ My Cabinets
- ▶ Searches
- ▶ Advanced Workflow

Search Drawers, Folders, e Search Default In cabinet: All Cabinets

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Releasing Information

- We process a lot of mail to release information



- PHI Authorizations
- Release of Information
- Certified Mail
- Guardian consents
- Person Centered Planning
- Correspondence
- Requests
- Treating Facilities
- Vitals and Records

Storing Information



- ▼ Records
 - ▶ Medical
 - ▼ Programming
 - ▶ Active Treatment
 - ▼ Authorizations & Consents
 - Anesthesia Consent
 - Emergency Tx Consent
 - Guardian Notifications
 - Individual and or Group Therapy
 - Individual Blood Borne Pathogens testing
 - Interviews, Media, Photograph, & Video Consents
 - Miscellaneous Consents
 - Notice of Privacy Practices
 - Outcomes Training
 - ▶ PHI Authorizations
 - Special Olympics
 - ▶ Chart Notes
 - ▼ Correspondence
 - Certified mail
 - Event Flyers
 - Invitations
 - Letter to Parents-Guardians
 - Miscellaneous
 - PCP

- ▼ Release of Information
 - 2011
 - 2012
 - 2013
 - 2014
 - APS
 - DLC
 - ▼ Requests
 - ▶ Incoming Requests
 - ▶ Outgoing Requests



Once we scan a document

- We can send hard copy to the buildings
- Shred it
- Store hard copy if it permanent
- Add a retention into Efile

We found a great tool

A screenshot of the FileCabinet login interface. It includes a 'User Name' field with 'amy lewis' entered, a 'Password' field, and 'Close' and 'Log In' buttons. There is a link for 'Login with windows account' and a checkbox for 'Remember me on this computer'. Below that, it shows 'Server: (9000.000.000.1234)' and 'Manual' options for 'Address' and 'Port'. At the bottom, there is a red error message: 'Failed to find any servers. Please refresh the server list or use the manual option.'

User Name: amy lewis

Password:

Close Log In

[Login with windows account](#)

Remember me on this computer

Server: (9000.000.000.1234)

Manual Address: Port:

Select a Server:

Failed to find any servers. Please refresh the server list or use the manual option.

1. Eliminating Paper
2. Secure Login per User.
3. Users Have Unique Security Settings
4. Stored Encrypted on a Secure Server
5. Synced in with Charting System
6. Similar to current binder structure
7. Easy Access for Viewers
"Need to know" basis.
8. Enhances our Accounting of Disclosures
9. Audit Logs, Review Users Activity
9. Access Ease Information
10. You Can Make Unique Projects

