

Ten Easy Steps to Set Up Your Imaging Application

This worksheet is designed to show you just how easy it is to adapt OpenDOX to your business needs. Basically, you should know three things before beginning. Which work process(es) will be automated, the degree an index is considered a searchable item (none, search, search/index), and should the index be a required one compelling the user to enter or select valid data before proceeding. OpenDOX allows for more than 10 indexes and our experience has shown that this is more than adequate to streamline existing work processes.

Now, please follow along with the sample installation, then enter your own information in the shaded boxes.

1	<p>Let's start by naming your application. You may choose your company name, project, etc.</p> <p><i>The Application Title will be the name of a medical forms processing company.</i></p>	<p><i>Example:</i></p> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Billings Galore Inc.</div>	<p>Enter your Application Title:</p> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%;"></div>		
2	<p>The Folder Key is the one by which you generally reference your files. Documents with the same Primary Index will be placed in the same folder.</p> <p><i>In the case of Billings Galore, the Provider number is used for all claims.</i></p>	<p><i>Example:</i></p> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Provider Number</div>	<p>Enter your Folder Key:</p> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%;"></div>	<p>Searchable</p> <p>None Search Search/Index</p>	<p>Required</p> <p>Yes</p>
3	<p>Both Title indexes can be used to further categorize the document.</p> <p><i>If a Physician calls for an update on his account but cannot remember his Provider number, we can use his name or his patient's name to retrieve a folder.</i></p>	<p><i>Example:</i></p> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Physician's Name</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Patient's Name</div>	<p>Enter your Title Indexes:</p> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%; margin-bottom: 5px;"></div> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%;"></div>	<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <p>Yes No Yes No</p>
4	<p>The Document Dates are always a useful reference tool. They can represent the date a document was signed and submitted or completed.</p>	<p><i>Example:</i></p> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Date Signed</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Completed Date</div>	<p>Enter your Document Date Indexes:</p> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%; margin-bottom: 5px;"></div> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%;"></div>	<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <p>Yes No Yes No</p>
5	<p>The Value indexes allow you to assign numeric values to your documents.</p>	<p><i>Example:</i></p> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Claim Amount</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Allowable Amount</div>	<p>Enter your Value Indexes:</p> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%; margin-bottom: 5px;"></div> <div style="border: 1px solid black; background-color: #e0e0e0; height: 20px; width: 100%;"></div>	<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <p>Yes No Yes No</p>

6	<p>List1 will be known as Document Type and contains the different documents that will be stored in your image database.</p> <p><i>For example, we can use this index to find all of Dr. Einstein's claims based on its type.</i></p>	<p><i>Example:</i></p> <table border="1"> <tr><td>Medicare</td></tr> <tr><td>Medicaid</td></tr> <tr><td>Preferred Provider</td></tr> <tr><td>Standard</td></tr> </table>	Medicare	Medicaid	Preferred Provider	Standard	<p>Enter your List1 Information:</p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>					<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <table> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> </table>	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	
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Medicaid																								
Preferred Provider																								
Standard																								
Yes	No																							
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7	<p>List2 will be known as Diagnostic Code which further defines the document.</p> <p><i>This index would be useful if we need to categorize all of Dr. Einstein's documents based on treatment.</i></p>	<p><i>Example:</i></p> <table border="1"> <tr><td>Skeletal</td></tr> <tr><td>Pulmonary</td></tr> <tr><td>Gastrointestinal</td></tr> <tr><td>Neurological</td></tr> <tr><td>Cardiovascular</td></tr> </table>	Skeletal	Pulmonary	Gastrointestinal	Neurological	Cardiovascular	<p>Enter your List2 Information:</p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>					<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <table> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> </table>	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
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Gastrointestinal																								
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8	<p>List3 will be the Status index and shows the approval status of documents.</p> <p><i>When Dr. Einstein calls for an update of his account, the Administrator can readily provide the latest stats.</i></p>	<p><i>Example:</i></p> <table border="1"> <tr><td>Approved</td></tr> <tr><td>Pending</td></tr> <tr><td>Rejected</td></tr> <tr><td>Incomplete</td></tr> <tr><td>Suspend</td></tr> </table>	Approved	Pending	Rejected	Incomplete	Suspend	<p>Enter your List3 Information:</p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>					<p>Searchable (each)</p> <p>None Search Search/Index</p>	<p>Required</p> <table> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> <tr><td>Yes</td><td>No</td></tr> </table>	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
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9	<p>In Users Accounts, you are able to list all the individuals using your system, each with an individualized set of privileges.</p> <p><i>OpenDOX provides for over 40 privileges and an Administrator can customize Users based on their needs.</i></p>	<p><i>Example:</i></p> <table border="1"> <tr><td>Kathy</td></tr> <tr><td>Clayton</td></tr> <tr><td>Mei-Ling</td></tr> <tr><td>Dov</td></tr> <tr><td>Julio</td></tr> <tr><td>Sashana</td></tr> </table>	Kathy	Clayton	Mei-Ling	Dov	Julio	Sashana	<p>Enter your Users:</p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>															
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10	<p>Using Groups Accounts, you can organize your users into work groups or departments.</p> <p><i>Billings Galore is able to break out the work based on their regional hierarchy.</i></p>	<p><i>Example:</i></p> <table border="1"> <tr><td>Northeast</td></tr> <tr><td>Eastern</td></tr> <tr><td>Southern</td></tr> <tr><td>Northern</td></tr> <tr><td>Western</td></tr> </table>	Northeast	Eastern	Southern	Northern	Western	<p>Enter your Groups (If Any):</p> <table border="1"> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> <tr><td></td></tr> </table>																
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Now log into OpenDOX System Administration and enter your information into the OpenDOX database. That's it! You've configured your OpenDOX Document Image Management System.