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INTEGRATED SERVICES

MedFlow™

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What is MedFlow™?

MedFlow™ is an imaging and workflow management tool designed to expedite and audit a paperless work environment.
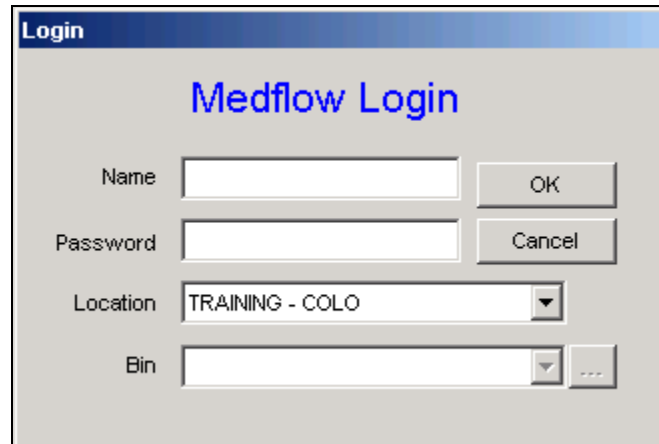
MedFlow's™ highly customizable, multi-site, paperless workflow system, manages both scanned documents and electronic records. As an integrated companion to Web RePrice™, MedFlow™ supports:

- Imaging.
- Progress tracking.
- Work distribution and load balancing.
- Date and time stamping with a complete audit trail.
- A "big picture" perspective of ongoing business processes.
- The ability to share documents across a network without downloading or duplication.

MedFlow™ can be accessed via the World Wide Web, a private intranet, or through a secure Internet connection. MedFlow's™ familiar 'Explorer'-style interface make this tool simple to use, requiring minimum employee training.

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MedFlow™ Login

To login to MedFlow™ select the MedFlow™ module from the Web RePrice™ home page by clicking on it. The MedFlow™ Login screen will open, as shown below:
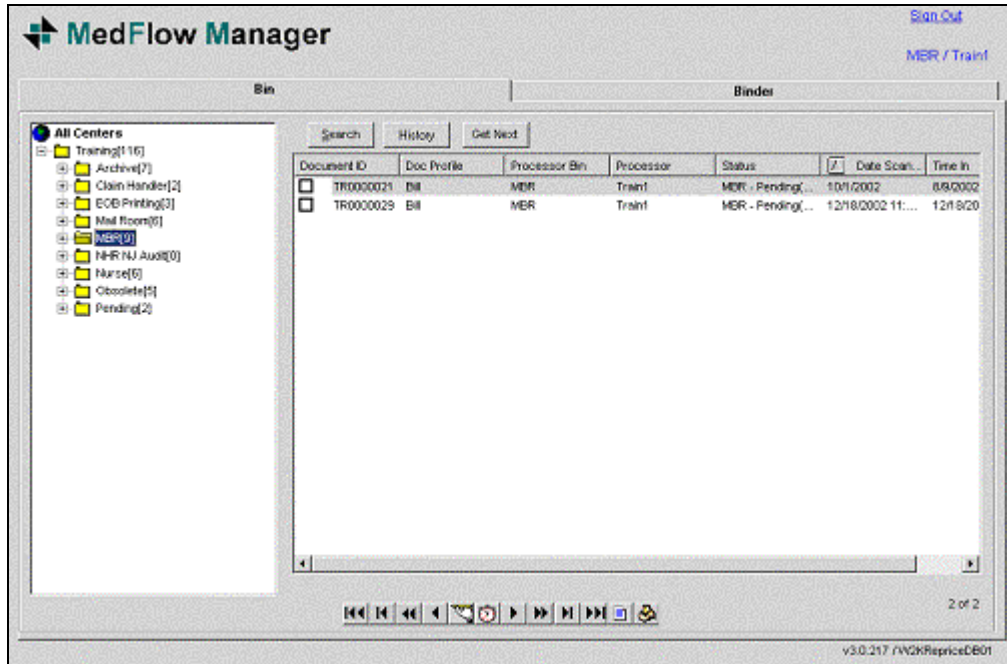

Type your User Name then press **Tab** to move to the Password field, key in your password and press **Enter**.

If you have multiple roles associated with your user name you will be brought to the Bin field to select with which role you would like to login. Once you have selected the bin, press **Enter**. However, if you only have only one role associated with the user name entered you will not be prompted to choose a bin.

Once logged in, you will be brought to MedFlow™ Manager, as shown below:

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MedFlow™ Bin View

This is the MedFlow™ Bin screen, which displays the documents in the specific work bins. The bin tree is located to the left side of the screen. This displays all the bins and documents within a certain center. The number next to the bin name is the amount of documents that are in the bin at the current time.

The document list is located to the right side of the screen, which displays the documents located in a selected or highlighted bin. The list displays the document's ID, profile, processor bin it is currently located in, processor, status, scanned date, and time it was placed into its current bin.

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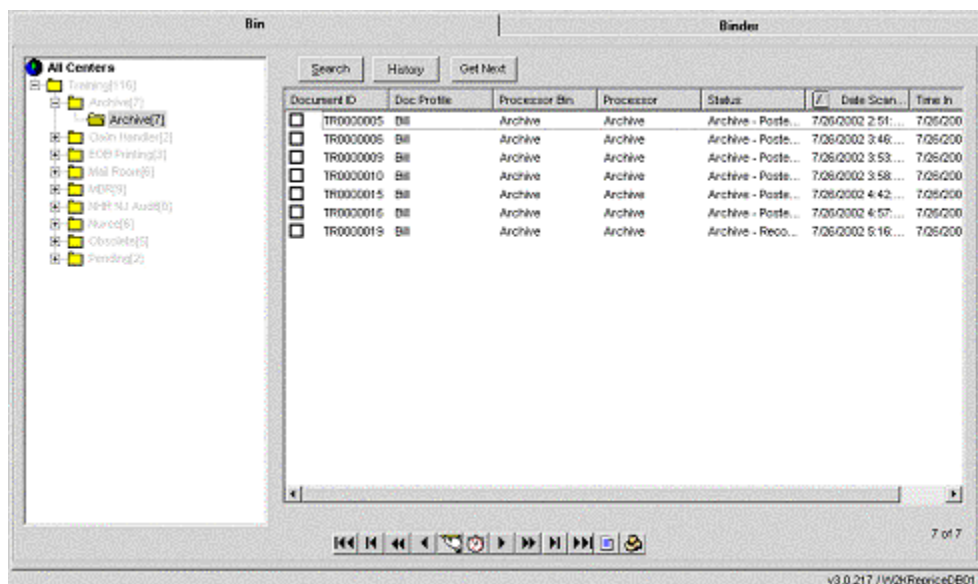
MedFlow™ Search

The Search function will allow users to search MedFlow™ bins for a specific document or a specific type of document. There are three types of searches that can be conducted, MedFlow™, Bill Header, or Docunet Search, each of these are used when having different information about a document. This search button has the same functionality as the Search option in the bin pop-up menu.
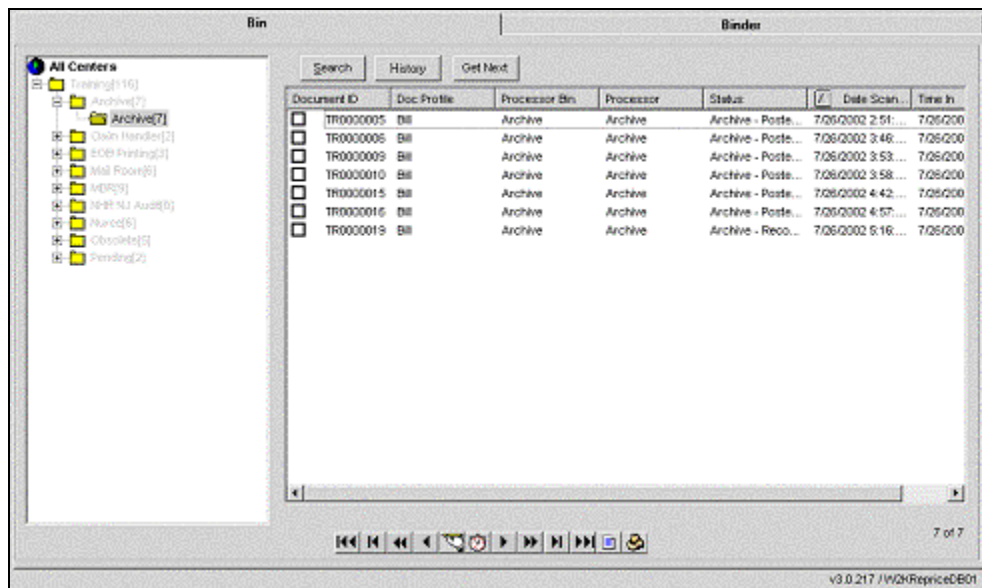
Before conducting a search you must select the bin or bins you would like to search within by highlighting them in the bin tree view. For example, if you would like to search all of the bins for a document highlight All Centers with your mouse. However, if you would like to search within only one bin, simply highlight that specific bin, as shown below:
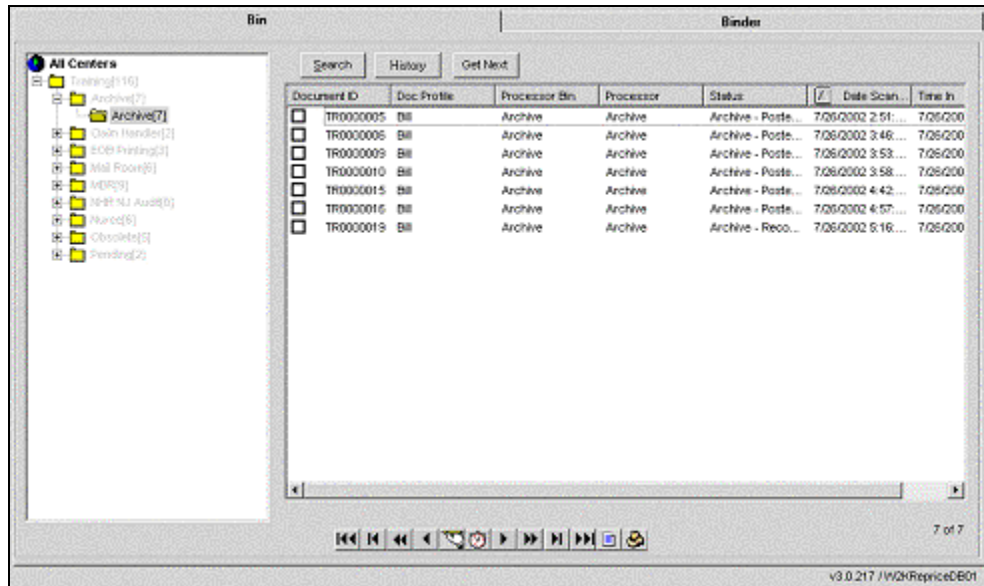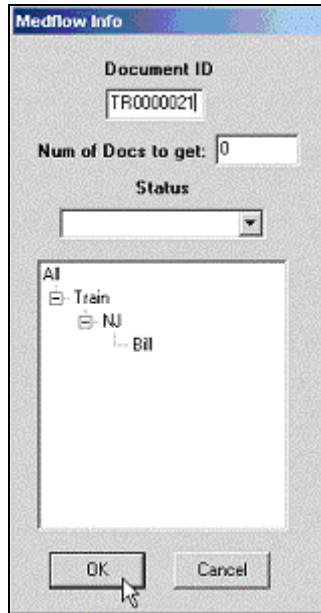
To conduct a MedFlow™ search, follow the steps below:

Once you have selected which bin(s) to search within, select the MedFlow™ Search option from the Search button drop down menu. The MedFlow™ Info window will open on your screen, as shown below:
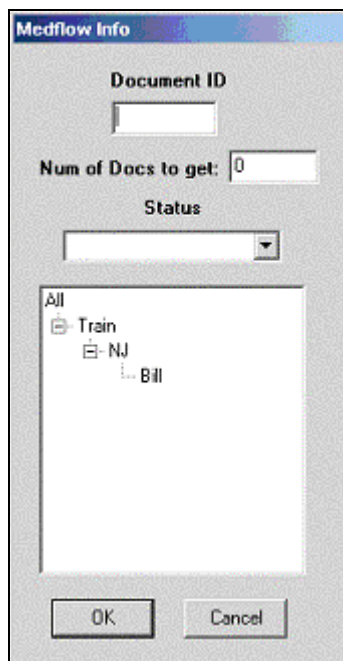
Within the MedFlow™ Info search screen there are three ways of searching for a document, each of which is explained below:

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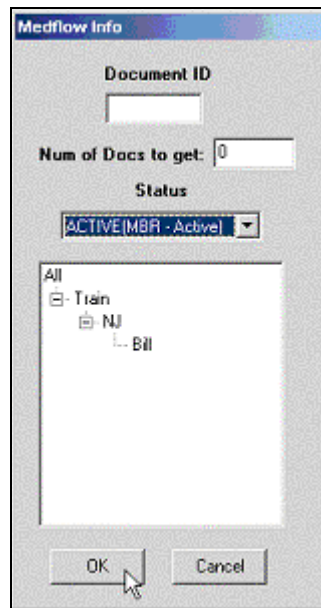
If you have the specific document ID that you are searching for, simply enter this number into the Document ID field then press **OK**. A wild card search can be used in this field by placing the search criteria in between two stars, for example, *20001*. This will close the MedFlow™ Info screen and display the matching document in the document display.

If you would like to search for all documents with a specific Status select the status from the drop down window and press **OK**. This will close the MedFlow™ Info screen and display the matching document(s) in the document display.

If you would like to search for all documents with a certain client profile, select the profile from the profile tree, by highlighting it with your mouse, then press **OK**. This will close the MedFlow™ Info screen and display the matching document(s) in the document display.

You may also search using a combination of any of the above.

To conduct a Bill Header search using this option, follow the steps below:

Once you have selected which bin(s) to search within, select the Bill Header Search option from the Search button drop down menu. The Bill Search window will open on your screen, as shown below:

Click on the Advance Link that is located underneath the **GO!** button. This will open a sub-menu of search choices; Patient Info, Claim Number, Provider Info, Doc ID or Select All. Select the area you would like to search within from these choices by placing a checkmark into its checkbox, as shown below:

Enter your search information into the Search field, and then press the **GO!** button, as shown below:

The search results will display on the bottom half of the Bill Search screen. To select these bills, highlight them and press **OK**. If you would like to select more than one bill hold the **Ctrl** key down while you highlight the bills with your mouse, then press **OK**. The Bill Search window will close and the selected bills will display in the document list of MedFlow™.

Docunet Search

The Docunet Search is used by clients that have the Docunet functionality enabled. Therefore the search will be discussed in the Docunet section of the Help document.

MedFlow™ History

The History button will open the history window displaying all processing and moving history for a selected bill from the time it was scanned to its current state. This History button has the same functionality as the history VCR control and the Show History option from the bin pop-up menu.
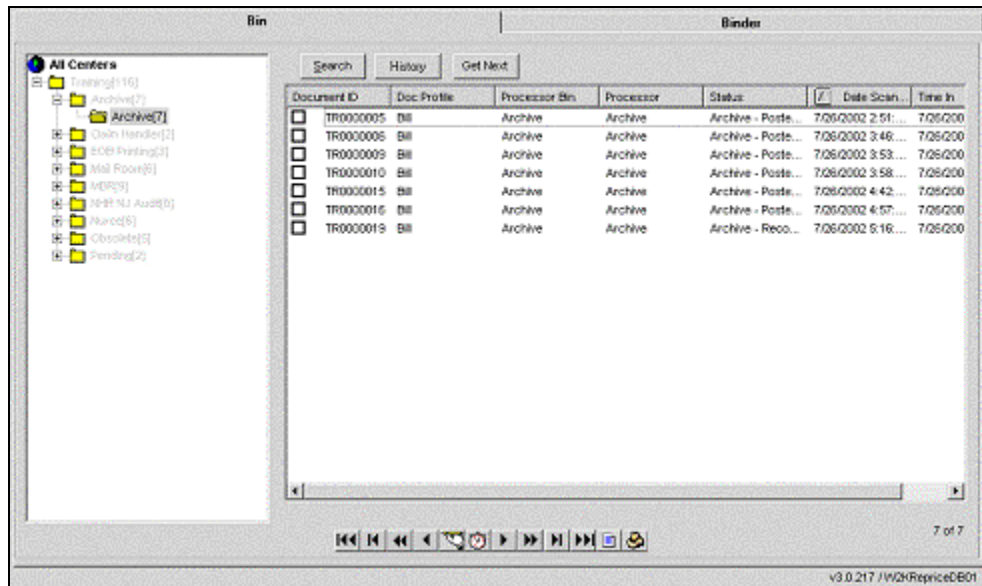
To view the history for a document using the History button:

From the document list select the document you would like to show history for by placing a checkmark next to it's document ID and highlight the line. Click on the History button from the MedFlow™ Manager screen.

The History of Document Transitions window will open for the selected document. The default for this window is to display only the moves that the document has made within bins. To view all of the documents history un-check the Display Moves ONLY checkbox.

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History of Document Transitions

TR0000021
Receive Date :

TimeStamp	Center	Bin	Processor	Status	DoneBy	Comment
Aug 9 2002 - 9:06:44	Training	MBR	Train1	ACTIVE	Train1	
Aug 9 2002 - 9:06:48	Training	MBR	Train1	HOT SAVE	Train1	
Oct 2 2002 - 13:25:33	Training	MBR	Train1	ACTIVE	Train1	
Oct 2 2002 - 13:25:43	Training	MBR	Train1	HOT SAVE	Train1	
Dec 13 2002 - 9:32:47	Training	MBR	Train1	PENDING	Train1	

☐ Display Moves ONLY

Close

Once you have finished viewing the document's history press the **Close** button to exit out of the window.

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Get Next

The Get Next button allows you to retrieve more documents than what are currently shown within the document list. This button has the same functionality as the Get Next option in the bin pop-up menu.
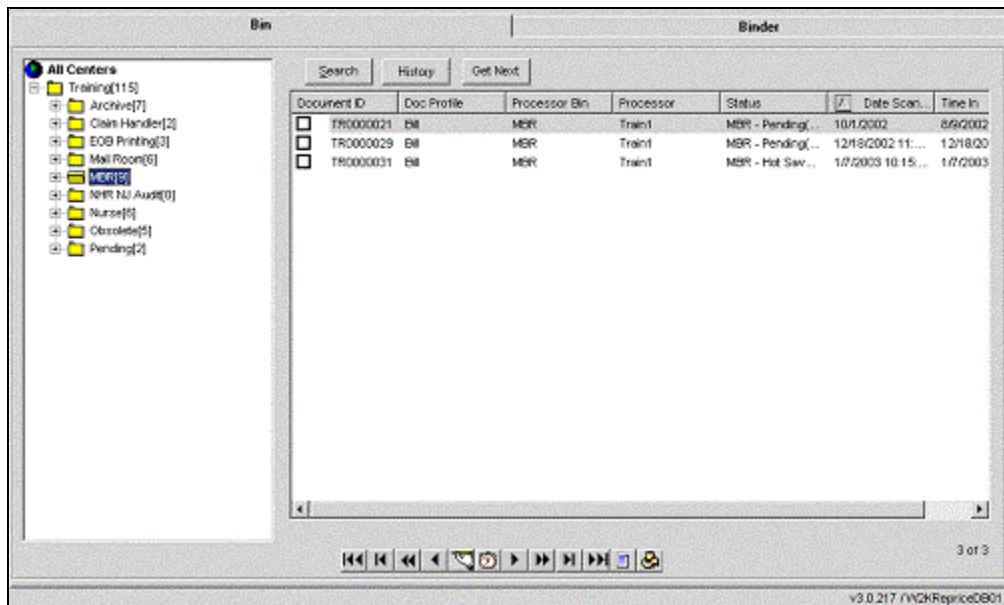
To use the Get Next button, follow the steps below:

Select the Get Next button. The Select records window will open on your screen.
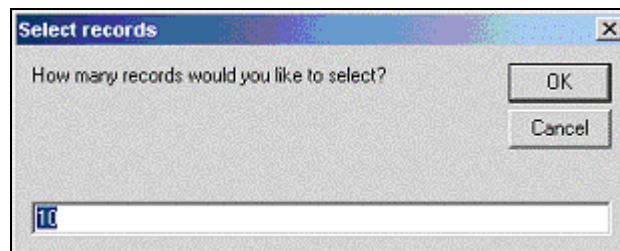
Select the number of additional documents that you would like to retrieve. The default is set to 10, highlight this number and replace it with the number you would like or leave it and press **OK**. The Select records window will close and the amount of documents you selected will be shown in the document list.

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MedFlow™ Bin Menu

The Bin View Pop-Up Menu holds access to much of the functionality and features pertinent to MedFlow. Depending on the role or 'hat' that you are logged in with will determine which options you have in the Bin menu. Some roles have only two or three options, while others have all options. Many of the options in this menu also have access to the same functionality other areas on the MedFlow™ screen.

Accessing the Bin Pop-up Menu

To access the bin pop-up menu place your mouse pointer into the document list section of MedFlow™ Manager, then right click. The bin pop-up menu will open to the right of your mouse pointer.

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MedFlow™ Bin VCR Controls

The VCR controls are quick keys to various commands within Web RePrice™. They are located in the bottom of the MedFlow™ Manager.

This button is used in conjunction with the document list section of MedFlow™. It moves focus to the first document in your bin.

This button is used in conjunction with the document list section of MedFlow™. It moves focus to the previous document in your bin.

This button is used in conjunction with the document viewer, clicking on it will display the first page of the current document.

This button is used in conjunction with the document viewer, clicking on it moves you to the previous page of the current document.

This button will open the annotation window, click it to read previous notes or enter notations for a selected bill.

The MedFlow™ History button opens the history window displaying all processing and moving history for a selected bill from the time it was scanned into the system to its current state.

This button is used in conjunction with the document viewer, clicking on this button moves you to the next page of the current document.

This button is used in conjunction with the document viewer, clicking on this button moves you to the last page of the current document.

This button is used in conjunction with the document list section of MedFlow™. It moves focus to the next document in your bin.

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This button is used in conjunction with the document list section of MedFlow™. It moves focus to the last document in your bin.

The Image Display button opens the scanned image that is associated with a bill.

The hat icon allows you to change the current role that you are logged in with. This will only be visible if the user name logged in with has more than one role associated with it.
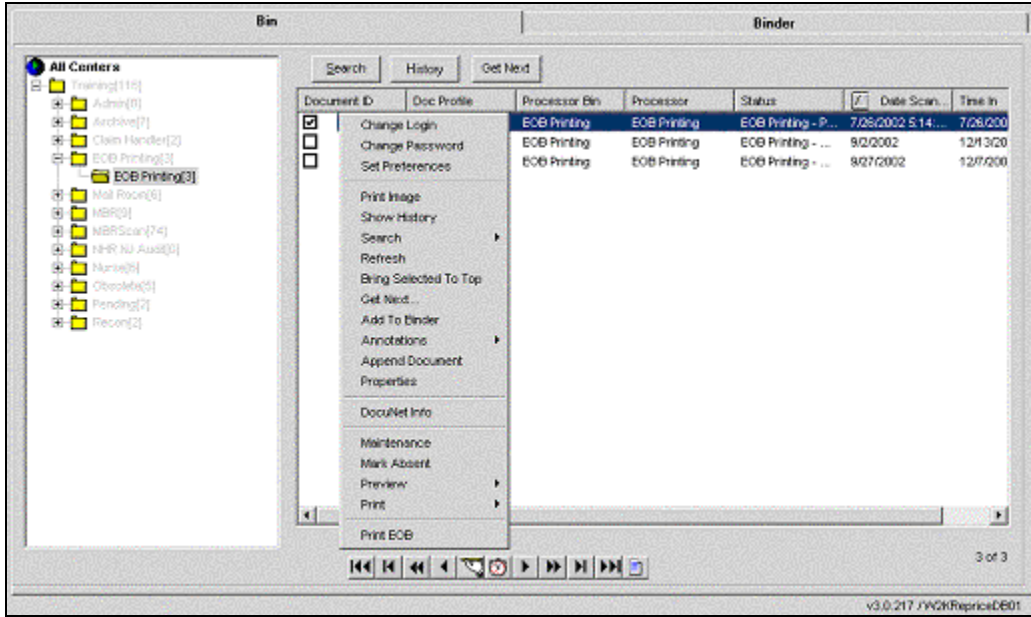
MedFlow™ Menus

MedFlow™ Bin Menu

The Bin View Pop-Up Menu holds access to much of the functionality and features pertinent to MedFlow™. Depending on the role or 'hat' that you are logged in with will determine which options you have in the Bin menu. Some roles have only two or three options, while others have all options. Many of the options in this menu also have access to the same functionality other areas on the MedFlow™ screen.

Accessing the Bin Pop-up Menu

To access the bin pop-up menu place your mouse pointer into the document list section of MedFlow™ Manager, then right click. The bin pop-up menu will open to the right of your mouse pointer.
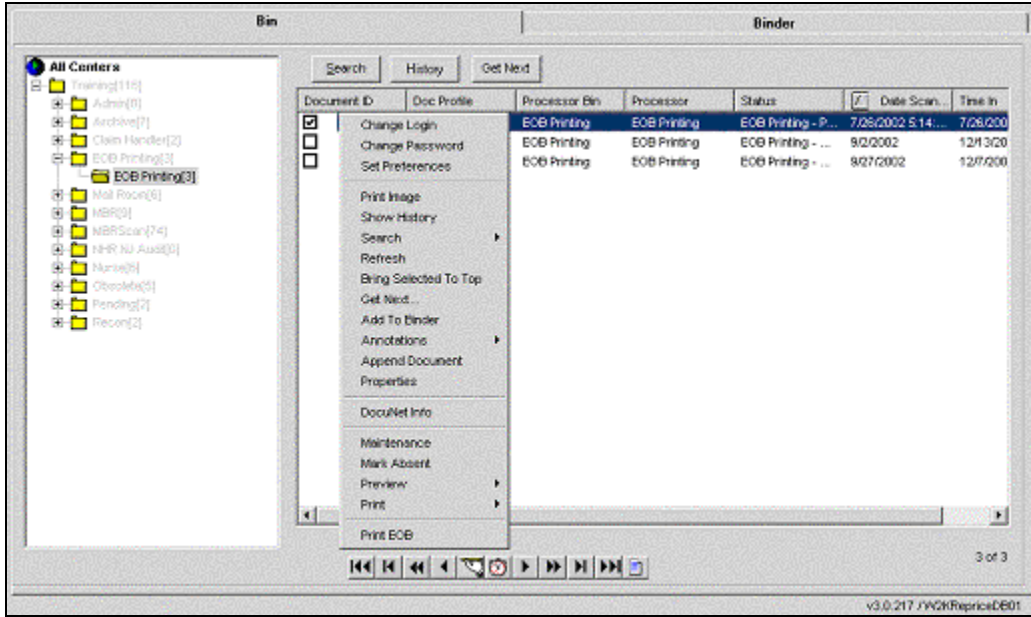
Change Login

The Change Login option allows you to change your login while you are still in the MedFlow™ module. From the login screen you can change the bin/'hat' or user name that you are logged in with.
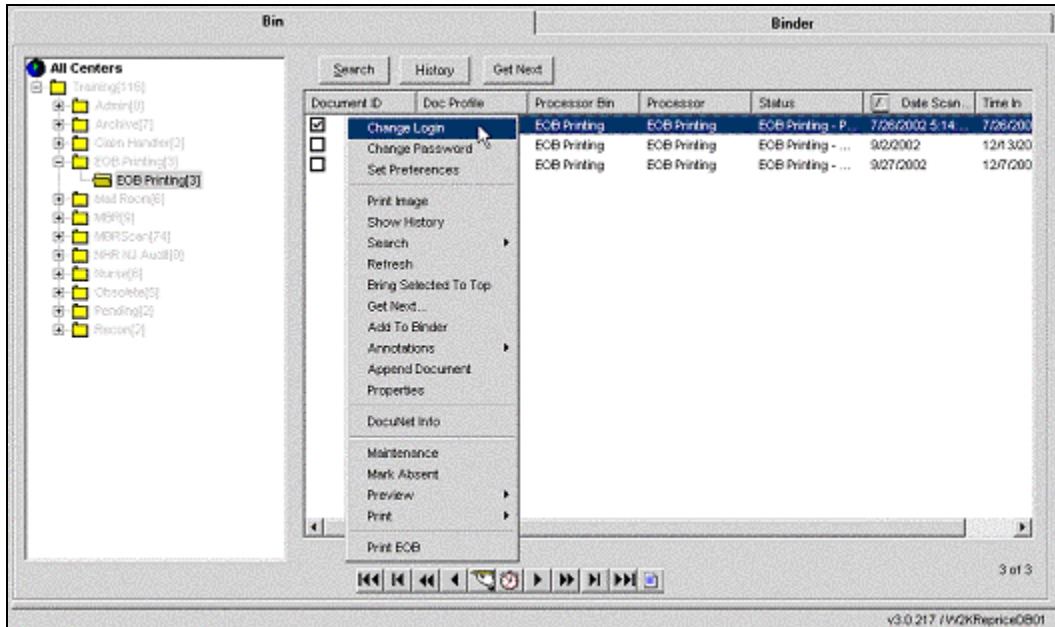
To change your login from this option, follow the steps below:

From the bin pop-up menu option menu select the Change Login option. The MedFlow™ Login window will open on top of the MedFlow™ Manager screen, as shown below:
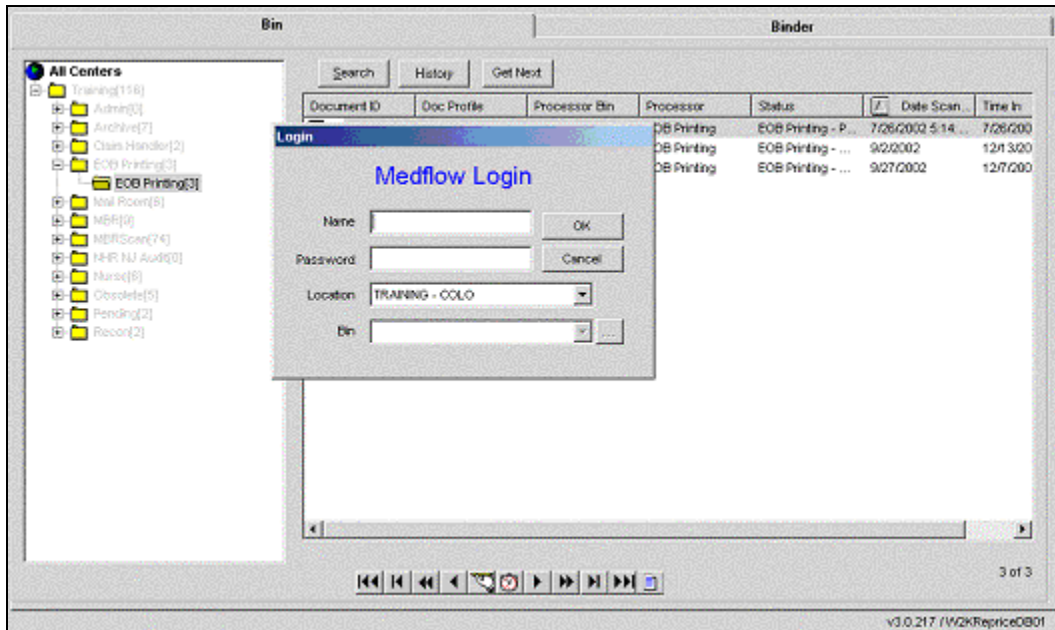
Enter the user name and password, using the **Tab** key to move from each field, then press **Enter**.

If you have multiple bins associated with this user name you will then be brought to the Bin field, where you will choose with which bin to login. Use the drop down menu to select the desired bin and press **Enter**. You will then be brought back to the MedFlow™ Manager screen logged in as the new user/bin. However, if you only have one bin associated with the user name entered you will be brought back to the MedFlow™ Manager screen logged in as the new user/bin without selecting a bin from the Bin field.

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Change Password

The Change Password option allows you to change your password for the user name that you are currently logged into MedFlow™ with. This action will change the password for the user name when it is used in any of the Web RePrice modules.
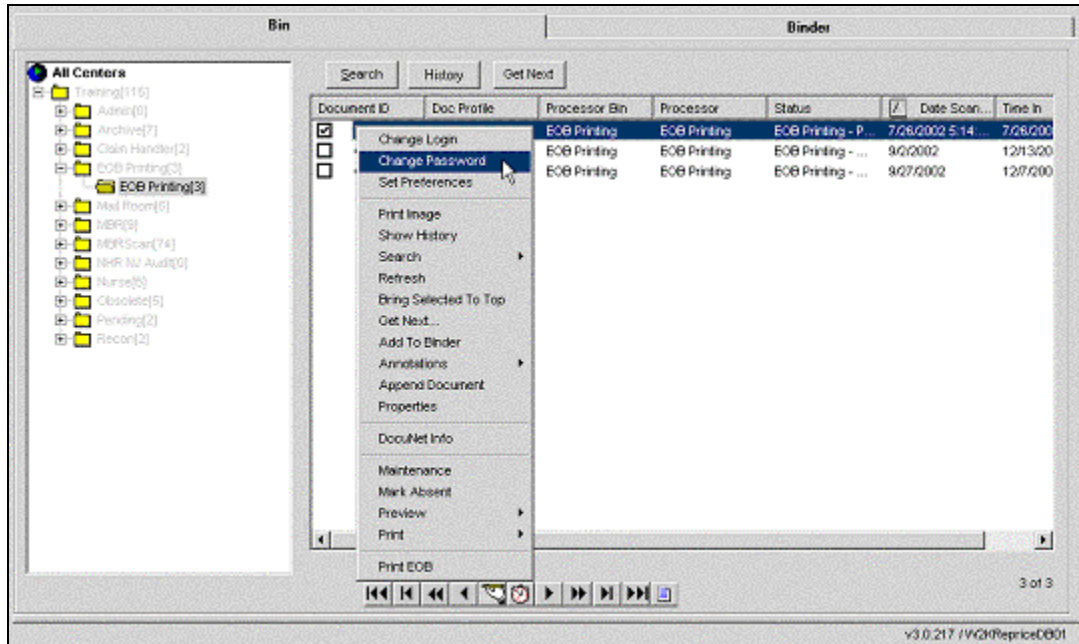
To change your password from this option follow the steps below:

From the bin pop-up menu option menu select the Change Password option. The change password window will open on top of the MedFlow™ Manager screen, as shown below:

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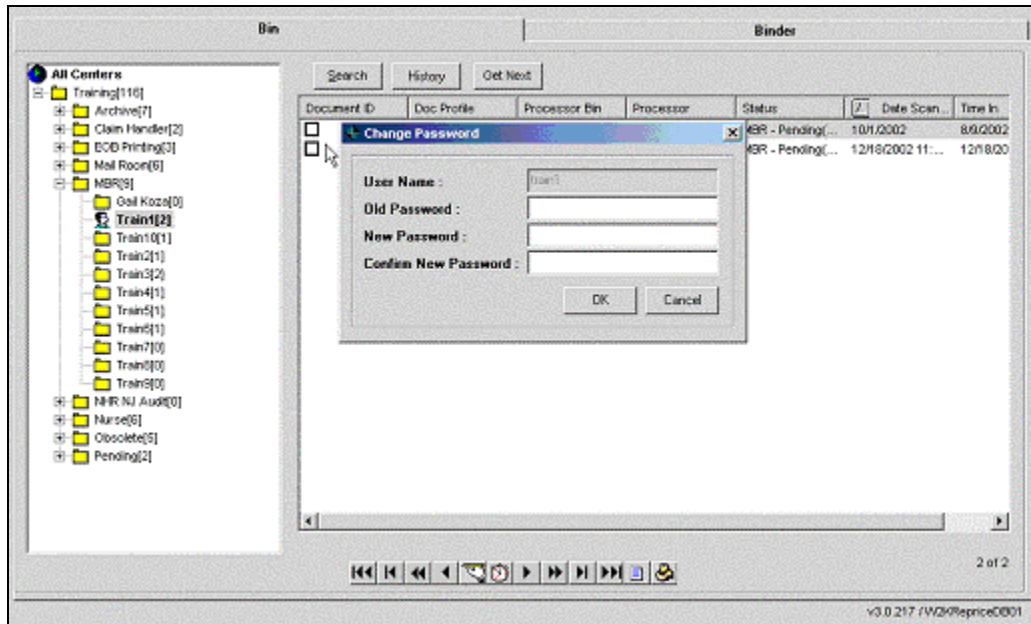
Enter your current password into the Old Password field, and then press **Tab** to move to the next field. Enter the new password into the New Password and Confirm New Password field then press **Enter**.

The Change Password screen will close and your password has now been changed.

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Set Preferences

The Set Preferences option allows you to set whether or not you would like a pop up annotation box to appear before making a move within bins for specific applications. If the preference is set to True, the annotation box will pop-up before the bill is moved to a bin. If it is set to False, the annotation window will not pop-up.
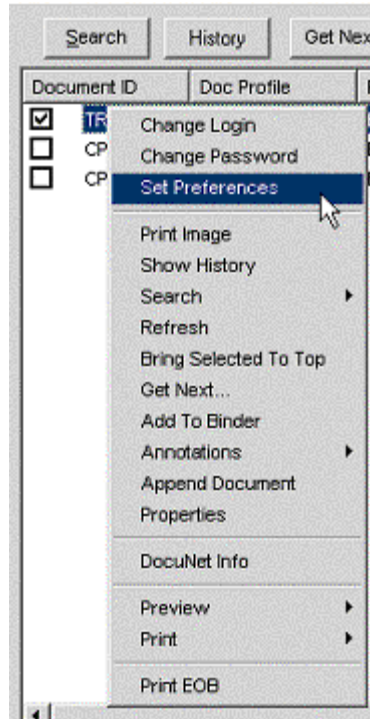
To set your preferences, follow the steps below:

From the bin pop-up menu option menu select the Set Preferences option by highlighting it with your mouse. The Preferences window will open on top of the MedFlow™ Manager screen, as shown below:
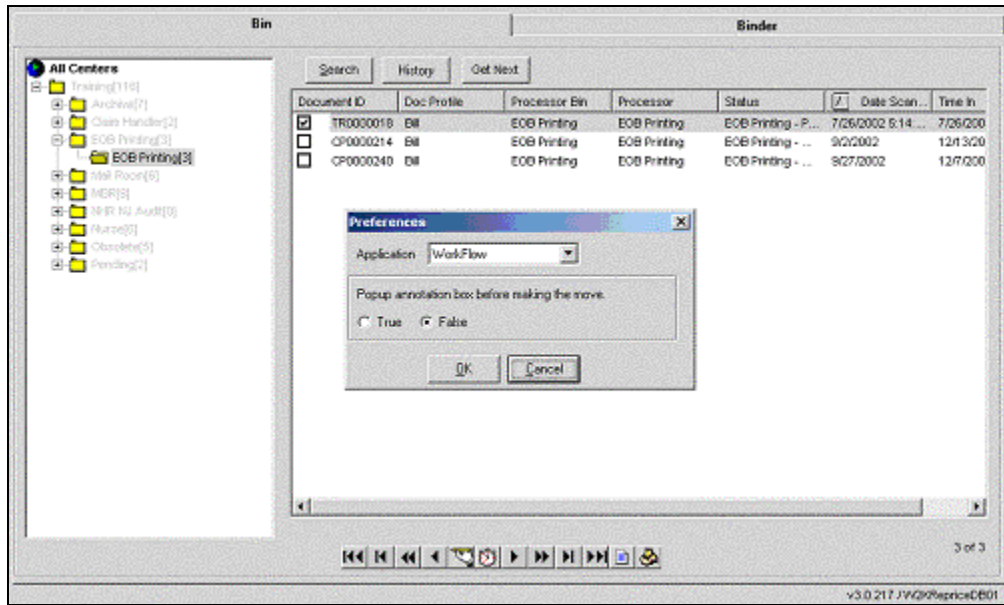
From the Application drop down window select the application you would like to set then select the radio button next to your preference of either True or False, then click **OK**.

Pressing the **Cancel** button to exit out of the preferences screen without setting or editing any preferences.

Print Image

The Print Image option allows you to print the scanned image for a selected document without having to open the document viewer.
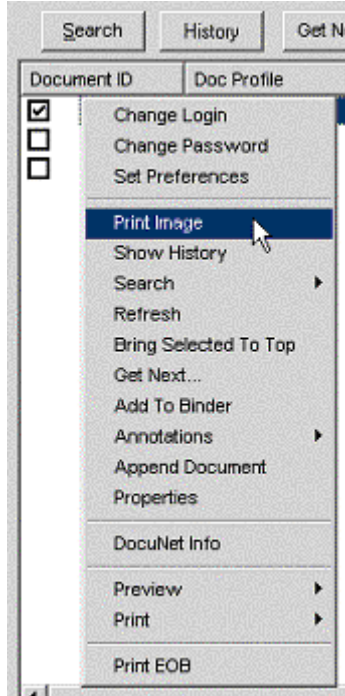
To print an image from this option, follow the steps below:

Select the document or documents you would like to print images for by placing a checkmark next to their document ID then select the Print Image option from the bin pop-up menu.

The image will automatically be sent to your computer's default printer. A list box window will open displaying the results of the printing. Click the **Done** button to close this window.

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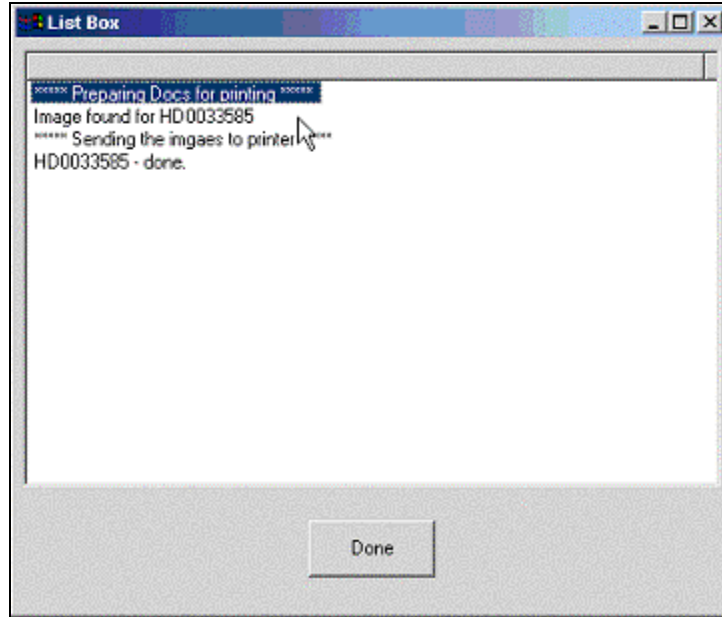
Show History

The Show History button will open the history window displaying all processing and moving history for a selected bill from the time it was scanned to its current state. This show history option has the same functionality as the history VCR control and the History button located above the document list in MedFlow™ Manager.

To show the history of a bill using this option, follow the steps below:

Select the document you would like to show history for by placing a checkmark next to the document ID, and then select the Show History option from the bin pop-up menu.

The History of Document Transitions window will open for the selected document. The default for this window is to display only the moves that the document has made within bins. To view all of the document's history un-check the Display Moves ONLY checkbox.

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Once you have finished viewing the document's history, press the **Close** button to close the window.

Search

The Search option will allow the user to search MedFlow™ bins for a specific document or a specific type of document. There are three types of searches that can be conducted, MedFlow™, Bill Header, or Docunet Search, each of these are used when having different information about a document. This search option has the same functionality as the Search button located above the document list in MedFlow™ Manager.
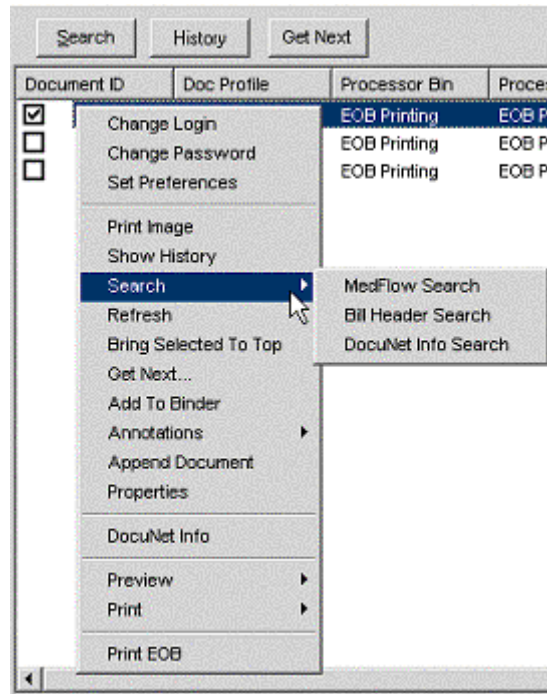
Before conducting a search you must select the bin or bins you would like to search within by highlighting them in the bin tree view. For example, if you would like to search all of the bins for a document highlight All Centers with your mouse. However, if you would like to search within only one bin, simply highlight that specific bin, as shown below:
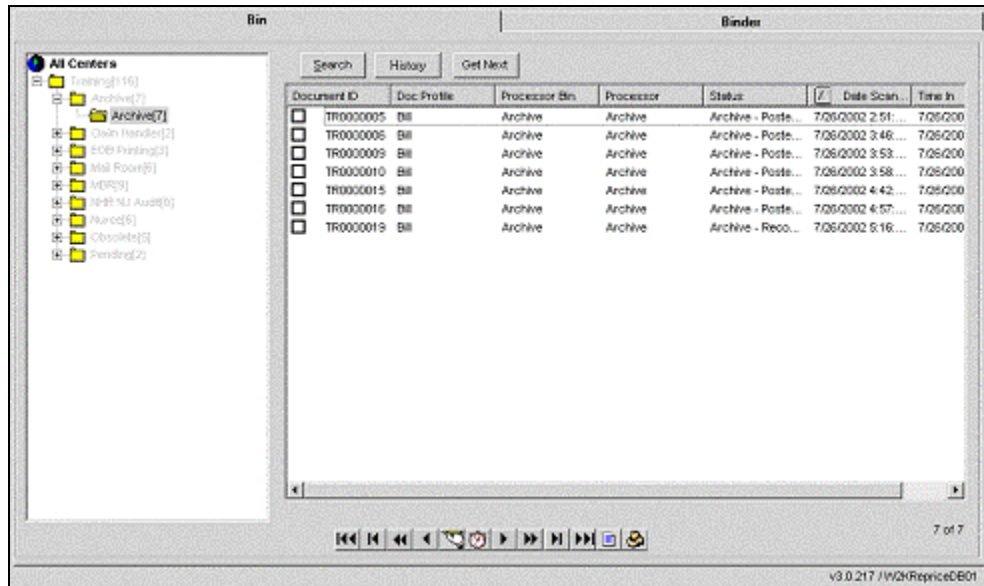
To conduct a MedFlow™ search, follow the steps below:

Once you have selected within which bin(s) to search, select the MedFlow™ Search option from the bin pop-up menu. The MedFlow™ Info window will open on your screen, as shown below:

Within the MedFlow™ info search screen there are three ways of searching for a document, each of which is explained below:

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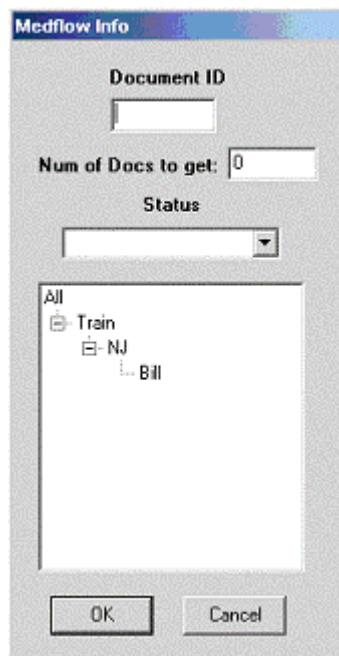
If you have the specific document ID that you are searching for, simply enter this number into the Document ID field then press **OK**. This will close the MedFlow™ Info screen and display the matching document in the document list.
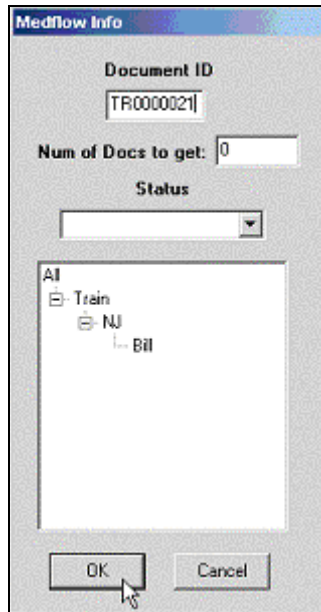
If you would like to search for all documents with a specific Status, select the status from the drop down window and press **OK**. This will close the MedFlow™ Info screen and display the matching document(s) in the document list.
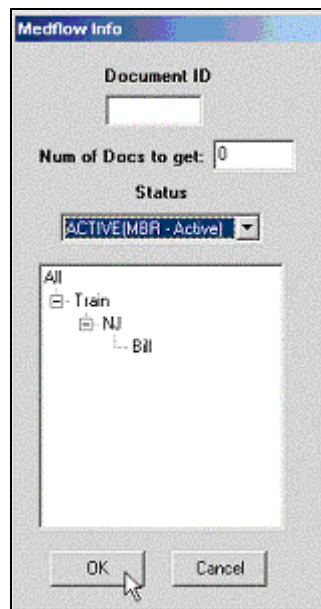
If you would like to search for all documents with a certain client profile, select the profile from the profile tree, by highlighting it with your mouse, then press **OK**.

This will close the MedFlow™ Info screen and display the matching document(s) in the document list.
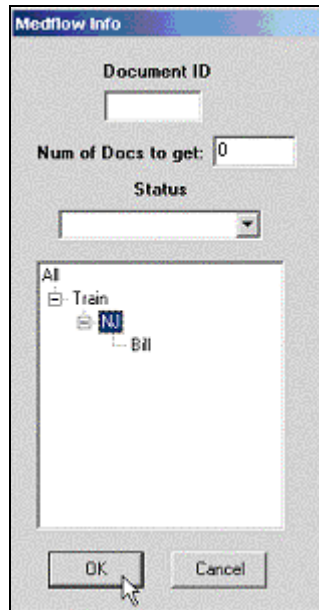
You may also search using a combination of any of the above.

To conduct a Bill Header search, follow the steps below:

Once you have selected within which bin(s) to search, select the Bill Header Search option from the bin pop-up menu. The Bill Search window will open on your screen, as shown below:

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Click on the Advance Link that is located underneath the **GO!** button. This will open a sub-menu of search choices; Patient Info, Claim Number, Provider Info, Doc ID or Select All. Select the area you would like to search within from these choices by placing a checkmark into its checkbox, as shown below:


Enter your search information into the Search field, and then press the **GO!** button, as shown below:

The search results will display on the bottom half of the Bill Search screen. To select these bills, highlight them and press **OK**. If you would like to select more than one bill hold the **Ctrl** key down while you highlight the bills with your mouse, then press **OK**. The Bill Search window will close and the selected bills will display in the document list of MedFlow™.

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Docunet Search

The Docunet Search is used by clients that have the Docunet functionality enabled.
 Therefore the search will be discussed in the Docunet section of the Help document.

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Refresh

The Refresh option will refresh the MedFlow™ Manager to display changes or moves that may have been made since you first opened the bin.

Search	History	Get N...
Document ID	Doc Profile	

☐ Change Login
☐ Change Password
☐ Set Preferences

Print Image
Show History
Search ▶
Refresh
Bring Selected To Top
Get Next...
Add To Binder
Annotations ▶
Append Document
Properties

DocuNet Info
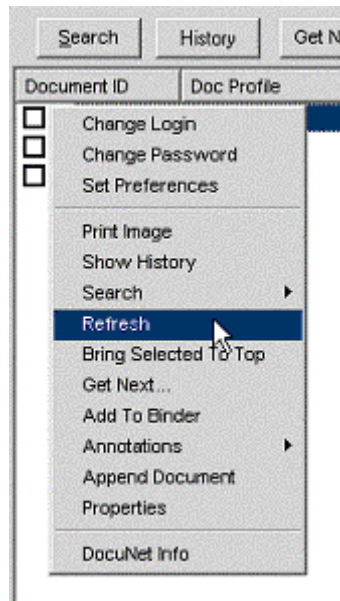
To use the Refresh option, follow the steps below:

Select the Refresh option from the bin pop-up menu. The MedFlow™ Manager screen will reload, and you will notice a slight flicker of the screen. MedFlow™ has now been refreshed.

Bring Selected to Top

The Bring Selected to Top option is used to bring a selected document to the top of the list of documents displayed in the document list.
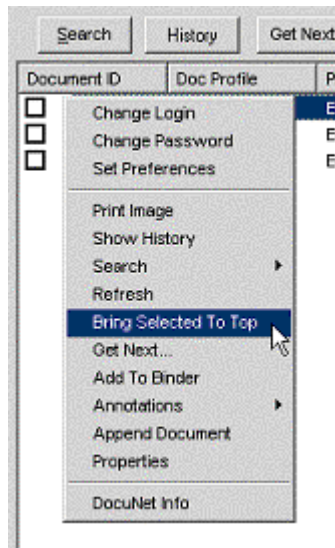
To use the Bring Selected To Top option, follow the steps below:

Select the document you would like to bring to the top of the list by placing a checkmark next to the document ID and highlight the line, then select the Bring Selected To Top option from the bin pop-up menu.

The selected document will now be moved to the top of the document list.

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Get Next

The Get Next option allows you to retrieve more documents within the document list. This option has the same functionality as the Get Next button located above the document display in MedFlow™ Manager.
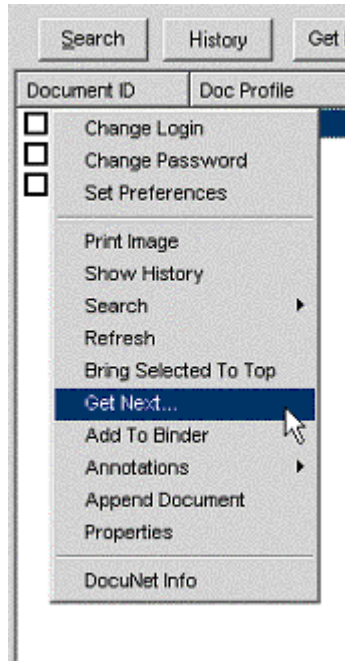
To use the Get Next option, follow the steps below:

Select the Get Next option from the bin pop-up menu. The Select records window will open on your screen.
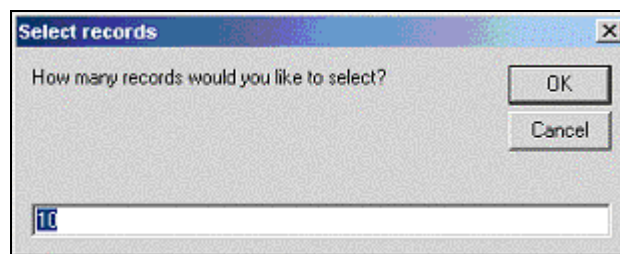
Select the amount of records that you would like to retrieve. The default is set to 10, highlight this number and replace it with the number you would like or leave it and press **OK**.

The Select records window will close and the amount of documents you selected will be shown in the document list.

Add to Binder

The binder functionality is currently under construction; therefore this option does not work at this time.

Annotations

The Annotations option allows you to enter or view annotations for a selected document. This option has the same functionality as the annotation VCR control.
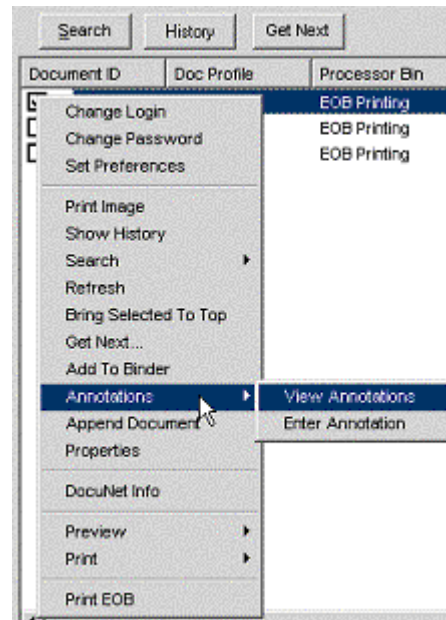
To view annotations using this option, follow the steps below:

Select the document whose annotations you would like to view by placing a checkmark next to the document ID and highlight the line, then select the View Annotations option from the bin pop-up menu. The Notes window will open with all previously entered annotations, as shown below:
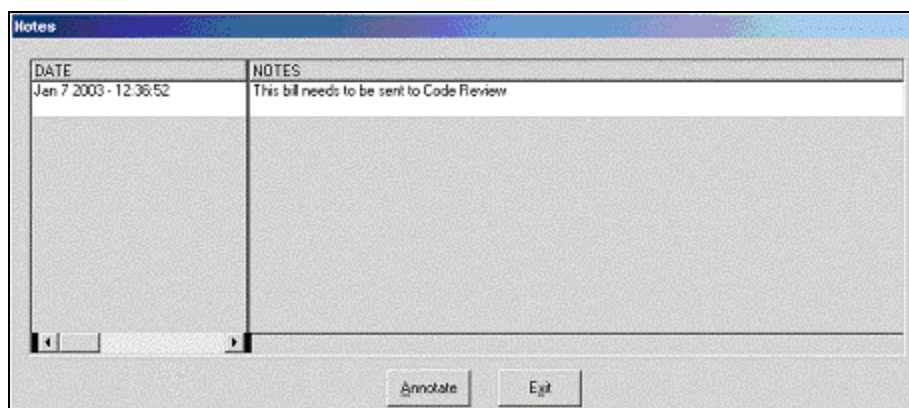
When you are finished viewing the annotations click on the **Exit** button to close the Notes screen.

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To enter annotations using this option, follow the steps below:

Select the document that you would like to enter annotations to by placing a checkmark next to the document ID and highlight the line, then select the Enter Annotations option from the bin pop-up menu. The Note window will open with the cursor in the text field, as shown below:
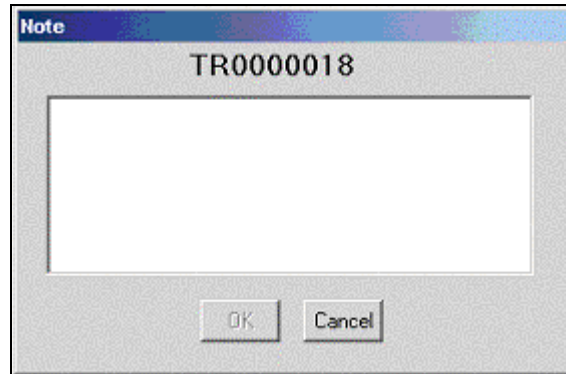
Enter your annotation into the text field and click on the **OK** button. The Note window will close and the annotation will be entered for that document.

To cancel out of the Note screen without saving an annotation, click on the **Cancel** button.

Append Document

The Append Document option will append or link two documents together. This is used frequently when supporting documentation is submitted for a bill that has already been processed through the Web RePrice™ system. This documentation would need to be linked to the already processed bill.
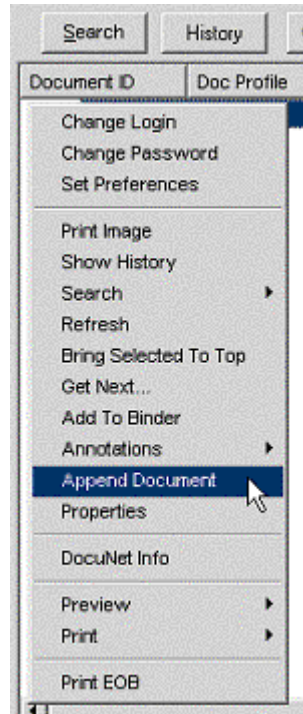
To append a document, follow the steps below:

Select the original document ID from the document viewer by placing a checkmark in the checkbox next to the Document ID and highlight the line then select the Append Document option from the bin pop-up menu. The Link Documents window will open with the selected document in the Original Document field, as shown below:
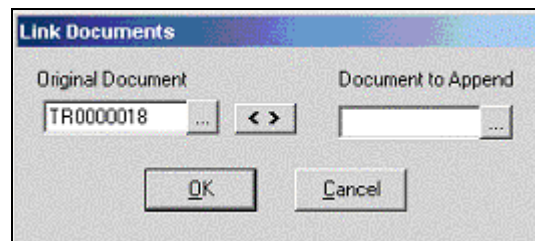
If you know the document number that you would like to append enter it into the Document to Append field. If you need to search for the document, click on the search button next to the Document to Append field.

A message window will open telling you to "Locate and then Double Click the document to be linked!!!" Left click anywhere on this message to close it (anywhere other than the cancel button), then locate and double click on the document you would like to append from the document list.

The Link Documents window will reopen with the selected document entered into the Document to Append field, as shown below:
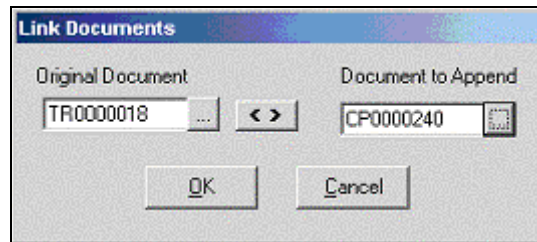
To link the two documents click on the **OK** button. A message will appear informing you that the two documents were linked, press **OK**.
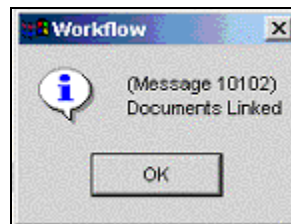
You will now see the original document in the document viewer having a paper clip next to the document ID, as shown below. This symbolizes that it has a document linked to it. You will also notice that the appended document is no longer shown in the document list.
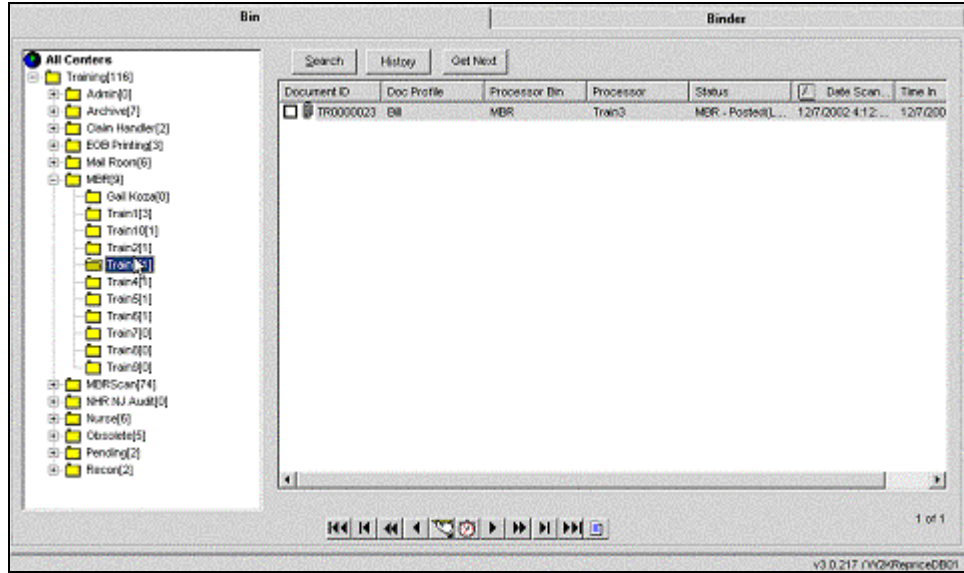
Properties

The Properties option will display the MedFlow™ information for a selected document. The information displayed is the selected bill's document ID, status and profile type. Through this screen there is also functionality to change the document profile type.
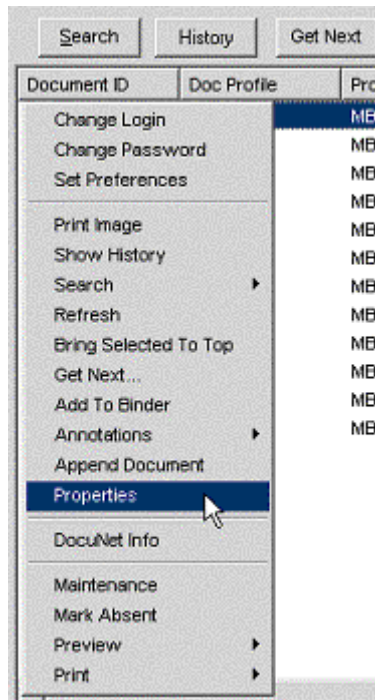
To view the properties of a bill, follow the steps below:

Select the document you would like to view the properties of by placing a checkmark next to the document ID and highlight the line.

Select the Properties option from the bin pop-up menu. The MedFlow™ Info window will open displaying the document's ID, Status and Document Type, as shown below:

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MedFlow Info

Document ID

CP0000245

Status

HOT SAVE(Hot Save · N ▼

All
Train
  NJ
    Bill

Change Doc Type

OK   Cancel
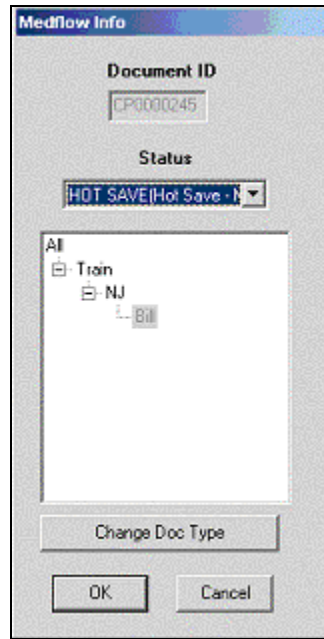
When you are done viewing the documents properties, click on the **OK** button to close the window.

To change a document's Doc Type through the properties option, follow the steps below:

Select the document you would like to change by placing a checkmark next to the document ID and highlight the line.

Select the Properties option from the bin pop-up menu. The MedFlow™ Info window will open displaying the document's ID, Status and Document Type. Click on the **Change Doc Type** button and the Document Type window will become editable.
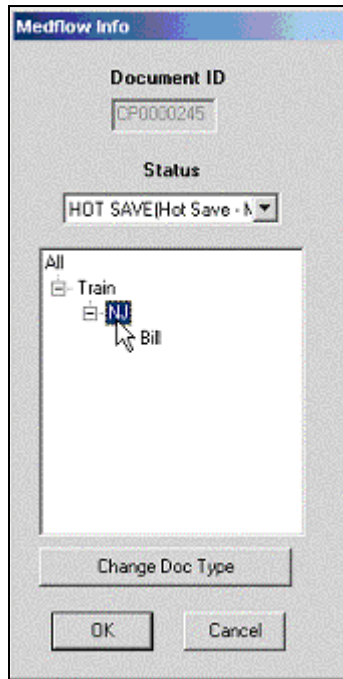
Select the new document type by highlighting it with your mouse. Then press **OK** to save the changes and close the MedFlow™ Info window.

Docunet Info

The Docunet Info option is used by clients that have the Docunet functionality enabled. Therefore all Docunet functionality will be discussed in the Docunet section of the Help document.

Maintenance

The Maintenance option contains the functionality to edit tables used to assign the functional parameters to the work-flow components, define the transitions that will be used by the work-flow components, and create new workflows. Please refer to the MedFlow™ Maintenance section of the document for further explanation on the Maintenance section of MedFlow™.

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Mark Absent

The Mark Absent option allows you to mark a user absent so that no bills can be moved to their bin. This functionality is useful when a processor is out of the office for an amount of time and shouldn't be receiving bills in their bin.
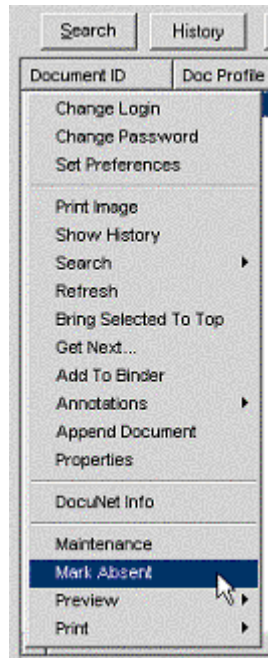
To mark a processor absent, follow the steps below:

Select the Mark Absent option from the bin pop-up menu. The User Maintenance window will open on your screen, as shown below:
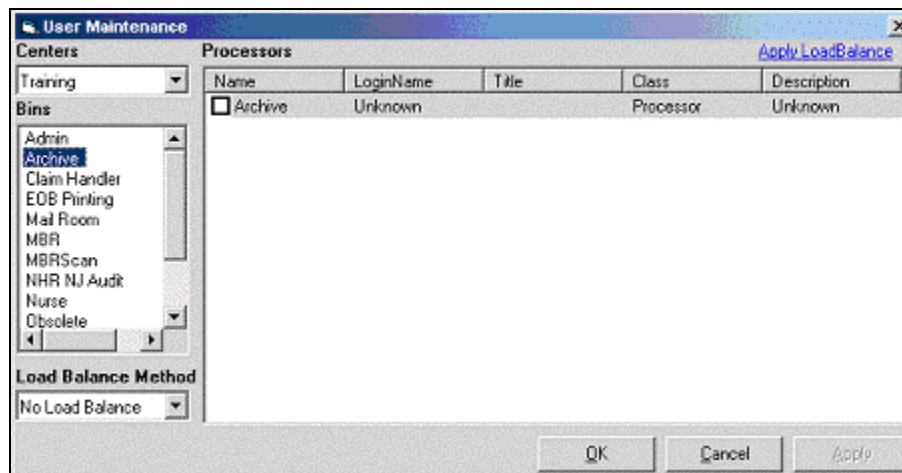
Select the Center that the processor is located under from the Centers drop down menu then select the Bin that the processor is located under by highlighting it with your mouse.

Select the load balance from the Load Balance Method drop down menu. This is a feature that is only set up for specific clients. If your company does not use load balancing or if you are not sure, select No Load Balance.

Using your mouse select the processor's name from the Processors section of the screen. This will be the processor you are marking absent.

Once you have entered all information click on the **Apply** button then the **OK** button to close the screen.
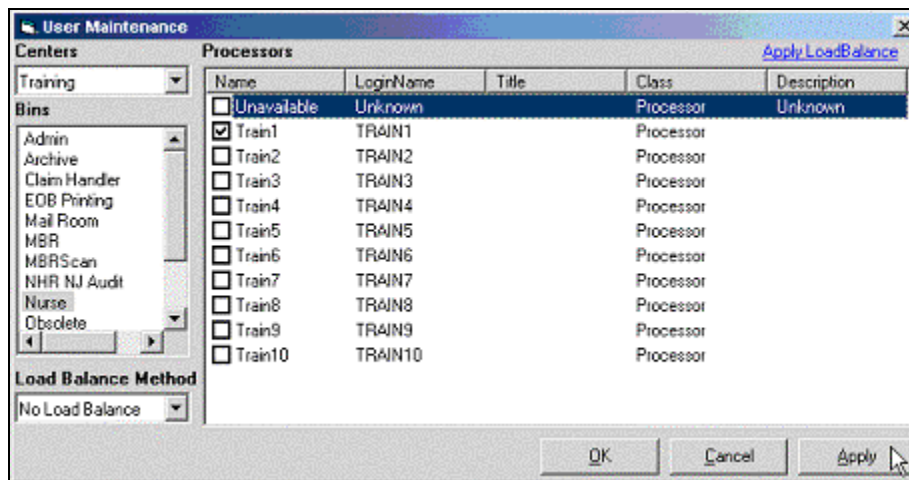
In MedFlow™ Manager open the bin that you have just marked absent. You will now notice that the yellow folder has turned into a grey folder symbolizing that bills cannot be moved to this bin.

To remove the absent mark on a processor follow the same steps as above, and remove the checkmark next to their name, then click **Apply**.

Preview

The Preview option allows you to view the EOB, Image or Both for selected documents. Each of these menu options will be available only if there is an EOB and/or Image associated with it, if there isn't the option will be grayed out and cannot be selected.
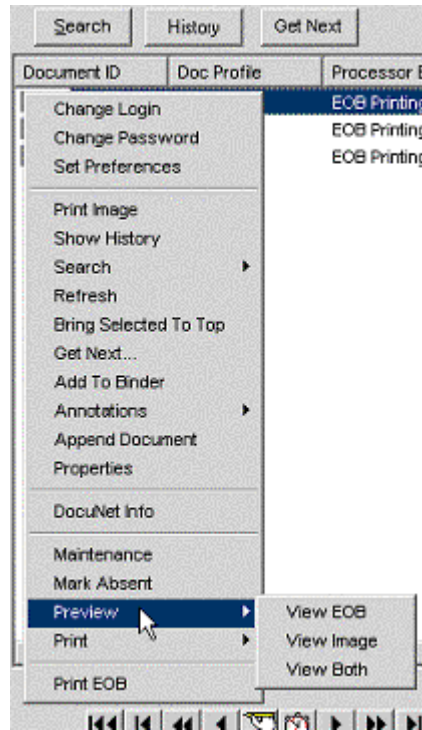
To view an EOB from this option, follow the steps below:

Select the document you would like to view the EOB for by placing a checkmark next to the document ID and highlight the line, and then select the View EOB option from the bin pop-up menu.

Adobe Acrobat Reader will open with the EOB for the selected document.

From Acrobat Reader you can print, save or view the EOB. To close the EOB click on the X button located in the top right hand side of the screen.

To view an Image from this option, follow the steps below:

Select the document you would like to view the Image for by placing a checkmark next to the document ID and highlight the line, and then select the View Image option from the bin pop-up menu.

The document viewer will open with the scanned image for the selected bill.

From Document Viewer you can print, save or view the image. To close the image click on the X button located in the top right hand side of the screen.

To view both EOB and Image from this option, follow the steps below:

Select the document you would like to view the EOB and Image for by placing a checkmark next to the document ID and highlight the line, and then select the View Both option from the bin pop-up menu.

Adobe Acrobat Reader will open on your screen displaying the EOB report and the Document Viewer will open displaying the Image for the selected document.

To close either of the windows click on the X button located in the top right hand side of the screen.
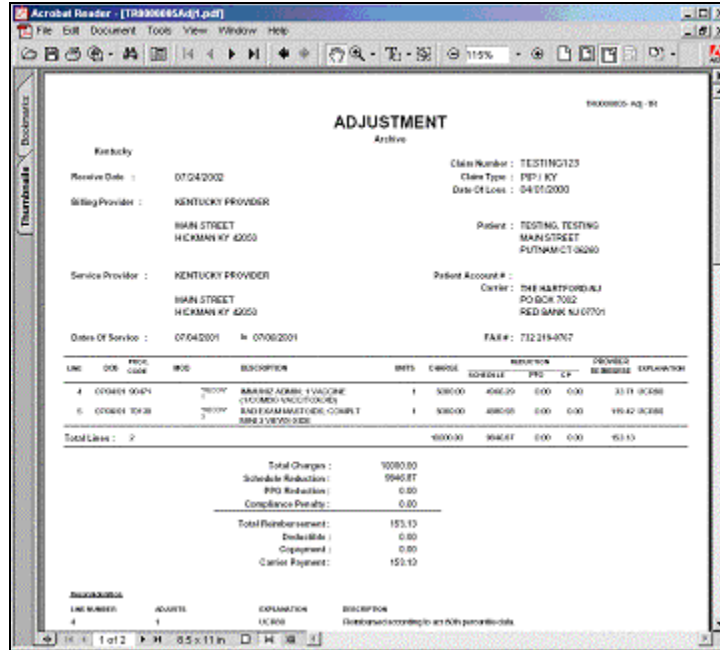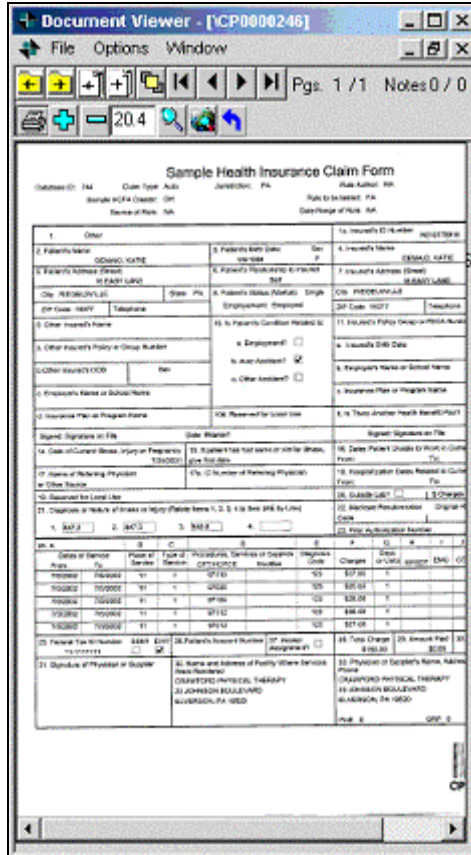
Print

The Print option allows you to print the EOB, Image or Both for selected documents. Each of these menu options will be available only if there is an EOB and/or Image associated with it, if there isn't the option will be grayed out and cannot be selected.

To print an EOB, follow the steps below:

Select the document you would like to print the EOB for by placing a checkmark next to the document ID and highlight the line, and then select the Print EOB option from the bin pop-up menu.

The EOB for the selected document will be automatically sent to your computer's default printer.

To print an image, follow the steps below:

Select the document you would like to print the image for by placing a checkmark next to the document ID and highlight the line, and then select the Print Image option from the bin pop-up menu.

The image for the selected document will be automatically sent to your computer's default printer.

To print and EOB and image, follow the steps below:

Select the document you would like to print the EOB and Image for by placing a checkmark next to the document ID and highlight the line, and then select the Print Both option from the bin pop-up menu.

The EOB and image for the selected document will be automatically sent to your computer's default printer.

Print EOB

The Print EOB option allows you to print the EOB for selected documents. Once an EOB is printed from this option its status will be marked posted.
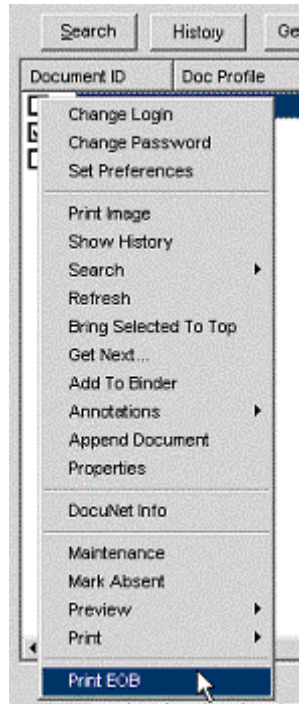
To print an EOB from this option, follow the steps below:

Select the document you would like to print the EOB for by placing a checkmark next to the document ID and highlight the line, and then select the Print EOB option from the bin pop-up menu.

The EOB for the selected document will be automatically sent to your computer's default printer.
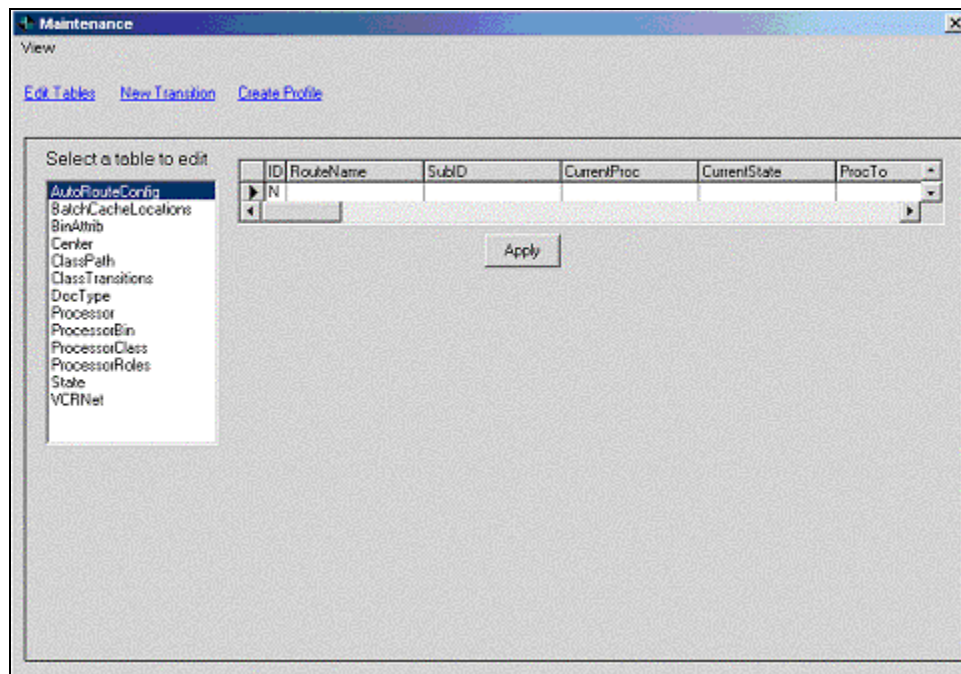
MedFlow™ Maintenance

Depending on the access you are given, you may have access to MedFlow™ Maintenance. There are three sections to MedFlow™ Maintenance. The Edit Tables screen allows you to edit the tables used to assign the functional parameters to the work-flow components, e.g., Bins, Processors, Doc Types, etc. The New Transitions screen allows you to define the transitions that will be used by the workflow components. The Create Profile screen allows you to create a new workflow by copying and pasting or cloning an existing client workflow.

Please do not change any of your maintenance settings unless you are confident you are doing it correctly or you have been directed to do so by a member of Concentra's IT development staff. Doing so will affect your output in Web RePrice™ and MedFlow™ Manager

To access MedFlow™ Maintenance follow the steps below:

Place the mouse pointer into the document list portion of MedFlow™ Manager and right click. A menu will open on the side of your mouse cursor. Select the Maintenance option from the pop-up menu. The Maintenance window will open on your screen, as shown below:

This is the MedFlow™ Maintenance default screen. The table names are located on the left side of the screen, while the selected table contents are located on the right side of the screen.
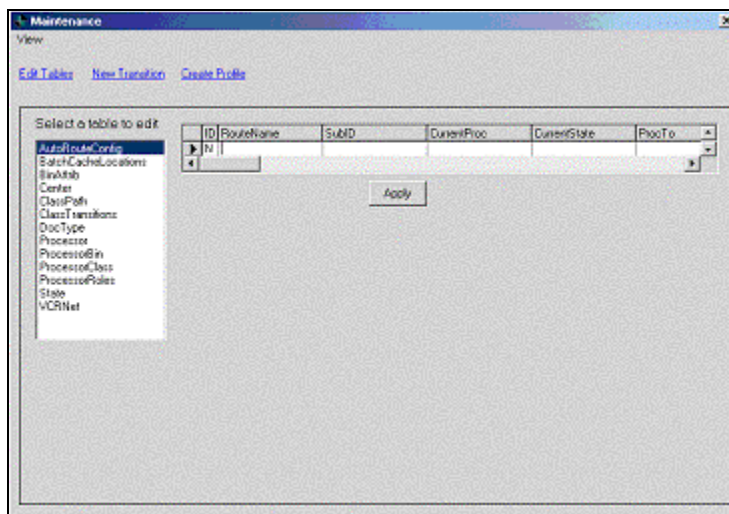

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Edit Tables

Auto Route Configuration

The Auto Route Configuration table is used if your system has been configured for Auto Routing capabilities. This configuration is done by Concentra's Information Technology department, and is used in conjunction with this table and its properties. Therefore creating an entry into this table alone will not create the auto routing configuration, it needs to be created in conjunction with Concentra's IT department.

Below are instructions of how to view or edit and also how to add a new autoroute entry into this table.

To view or edit an auto routing configuration, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
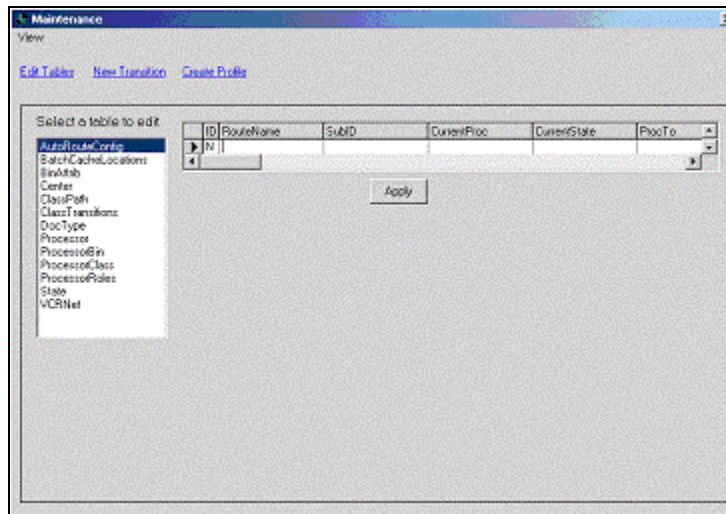

Select the AutoRouteConfig table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Auto Route Configuration table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white. Make the changes that you would like to make to this row, then press **Enter** through the entire line or click **Apply**.

**To add a new auto routing configuration, follow the steps below:**

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open inside of the screen displaying all tables available to edit, as shown below:


Select the AutoRouteConfig table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Auto Route Configuration table with all of the existing entries displayed.

Place your cursor into the Route Name field on the next available line. Enter the name of the new autoroute, then press **Enter**. Enter the Sub ID and press **Enter**. The Sub ID is the next sequential number for the route name.
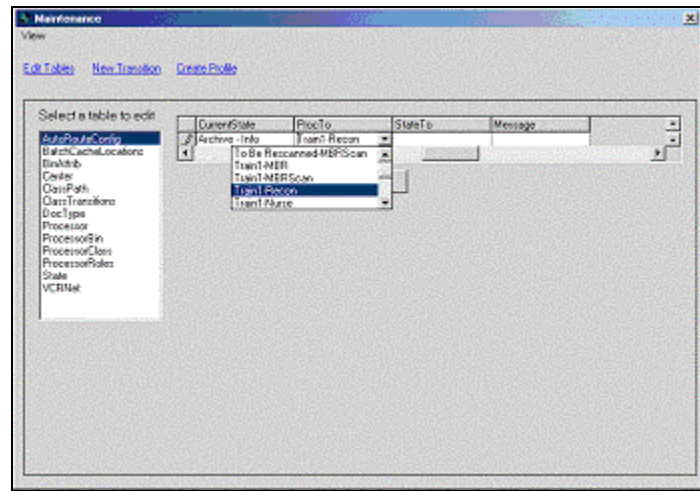
From the Current Processor drop down menu select the processor and bin that the document will be routed from, then press **Enter**.
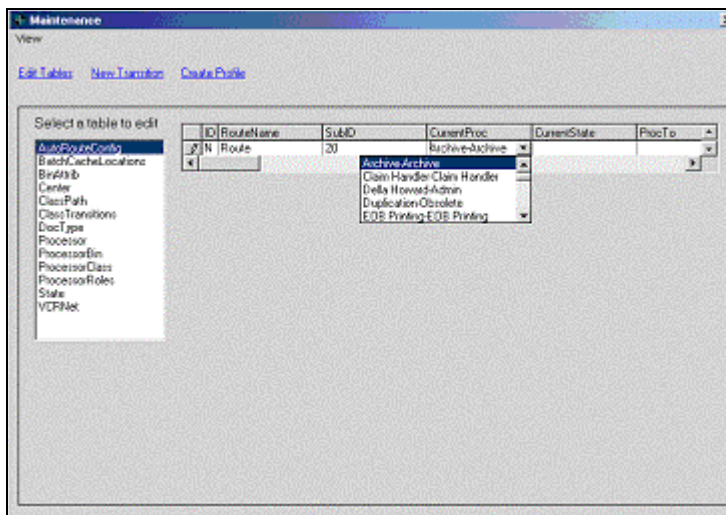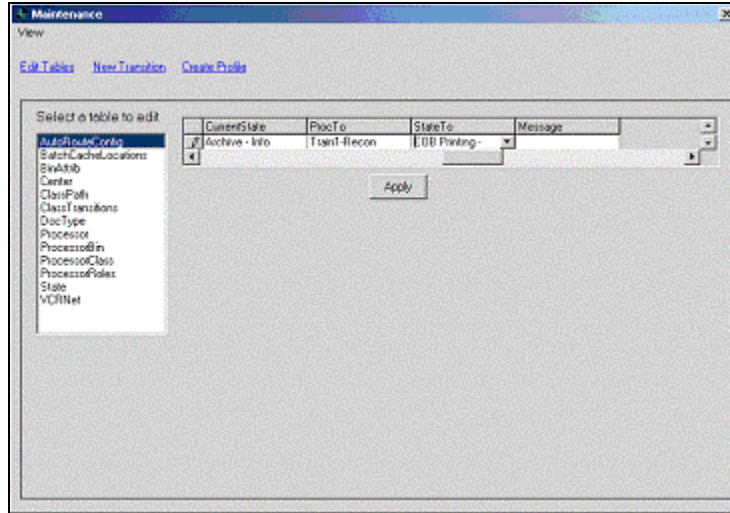

From the Current State drop down menu select the state that the document will be routed from, then press **Enter**.
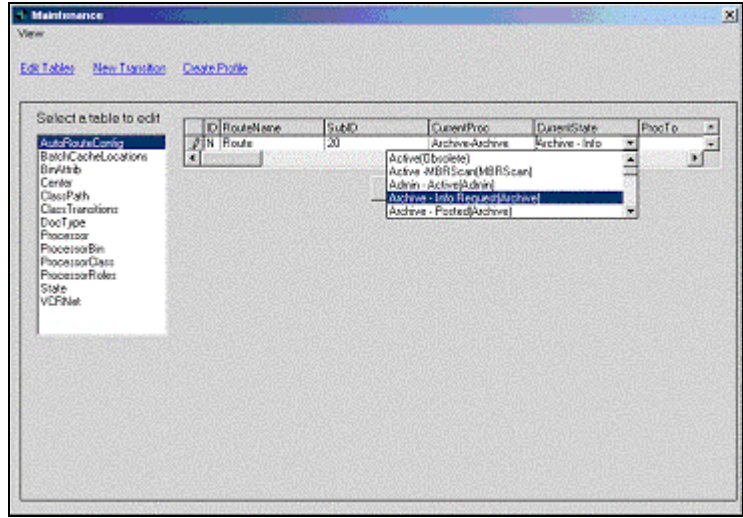
Select the processor and bin that the document will be auto routed to from the Proc To drop down menu, and then press **Enter**.

Select the state that the document will be auto routed as from the State To drop down menu, and then press **Enter**.

Enter a message for this autoroute configuration entry, then press **Enter** and click **Apply**.
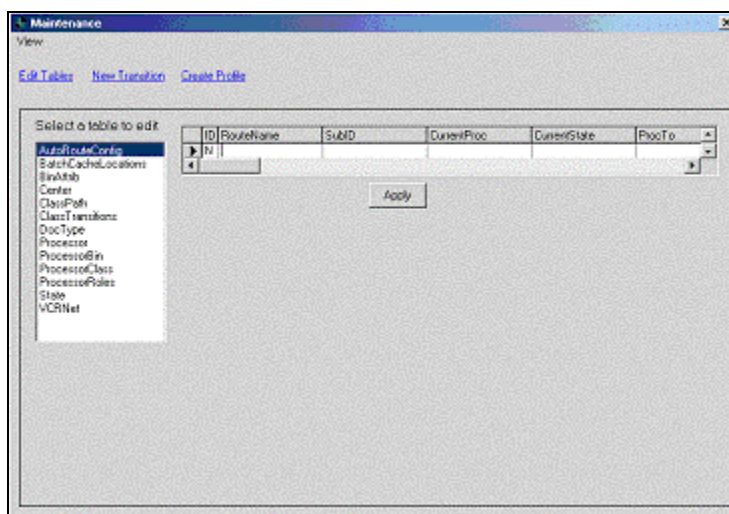
Batch Cache Locations

The Batch Cache Locations table is used to set the cache locations used when scanning documents into MedFlow™. There must be at least two locations entered into the table for each center, true and false (these are the values of the scan path), though there can be more than one false entry.

The true entry is the location that the documents are stored prior to being uploaded or batched into MedFlow™. The false entry is the location that the documents will be placed after being scanned/batched into MedFlow™. There can be two false entries for a center if you choose to store the documents in more than one location.

Below are detailed instructions on how to view and edit, and how to add a new batch cache location.
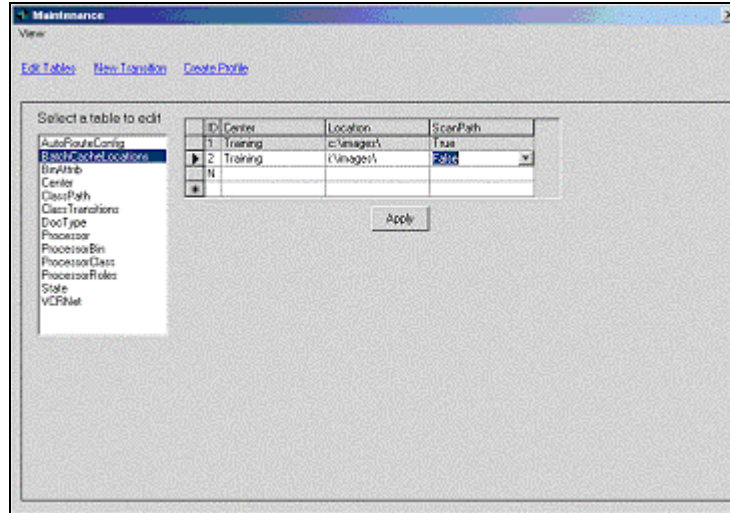
To view and edit the Batch Cache Locations table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:

Select the Batch Cache Locations table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

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Make the changes that you would like to make in this field, then press **Enter** through all of the remaining fields or click **Apply**.

To add a new batch cache location, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
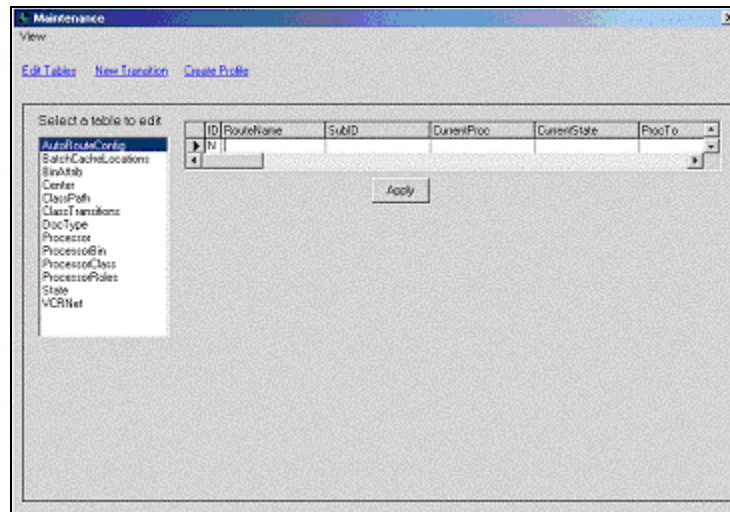
Select the Batch Cache Locations table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To enter a new location, place your cursor into the Center field on the next available line below the existing entries. Select the center to which this location will be created for from the Center drop down menu, then press **Enter**. Enter the path for the new location into the Location field, then press **Enter**. This is the same path that was set up in the

Administration module for this center. Select either true or false from the Scan Path drop down menu, then press **Enter**. Click on the **Apply** button to save all changes.
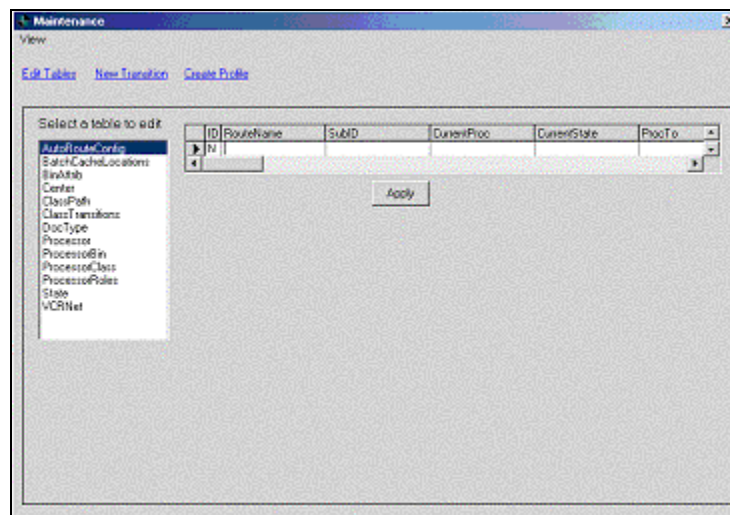
Bin Attributes

The Bin Attributes table is used to configure the menu items per bin. The menu is accessed by right clicking in the document list window of MedFlow™ Manager, and holds access to certain actions within MedFlow™.

Below are detailed instructions of how to view and edit, and also how to add a new entry to the Bin Attributes table.
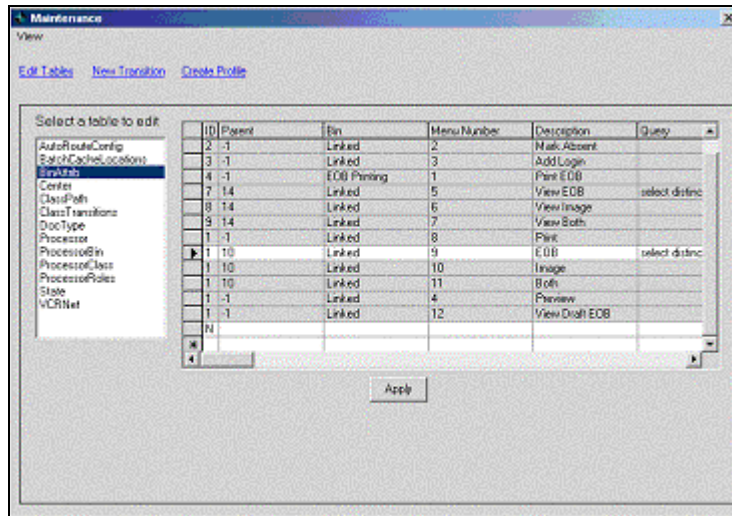
To view and edit the Bin Attributes table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:

Select the Bin Attributes table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

Make the changes that you would like to make in this field, then press **Enter** through the all of the remaining fields on the line or click **Apply**.

To add a new entry to the Bin Attributes table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
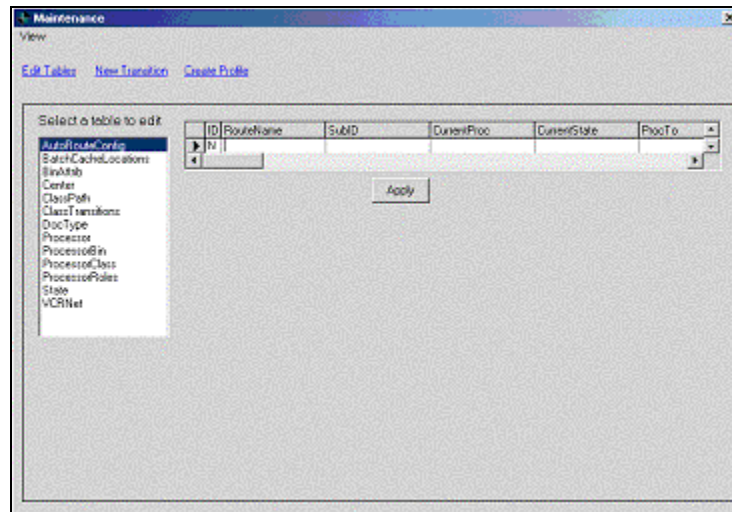
Select the Bin Attributes table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

Place your cursor into the Parent field on the next available white line. Enter the parent number into this field, and press **Enter**. Entering a '-1' in this field makes the attribute a parent, or main menu choice, whereas entering a number referencing another ID makes the attribute a child of the original.

Select the bin type for which you are adding the menu selection from the Bin field's drop down menu, and then press **Enter**.

Enter the number to represent what order the added selection will be placed on the menu, then press **Enter**. These numbers must be unique within each bin.

Select the menu item or attribute that you would like to add from the Description field's drop down menu, and then press **Enter**.

Enter through the Query and Depends On fields, entering the correct values for both of these fields. **These fields should only be used if you are knowledgeable in creating queries. Entering values into these fields can affect the rest of the application**

Enter the value '0' in the SendWFObject field, then press **Enter**.

Enter the values for the Object ID field, then press Enter. There should only be a value entered into this field if the line you are entering is a combination of two other actions, such as the description 'both'. In this case you have an action that consists of two other actions, therefore you have to reference what actions consist of both. Then press **Apply** to save.

For example, if I entered the following attributes for the nurse bin:

ID	Parent	Bin	Menu Number	Description	Query	Depends On	SendWFObject	Object ID
1	-1	Nurse	1	Print			0	

ID	Parent	Bin	Menu Number	Description	Query	Depends On	SendWFObject	Object ID
2	1	Nurse	2	EOB			0	

ID	Parent	Bin	Menu Number	Description	Query	Depends On	SendWFObject	Object ID
3	1	Nurse	3	Image			0	

ID	Parent	Bin	Menu Number	Description	Query	Depends On	SendWFObject	Object ID
4	1	Nurse	4	Both			0	2,3

I would then have the menu item shown below when logged into the Nurse bin:
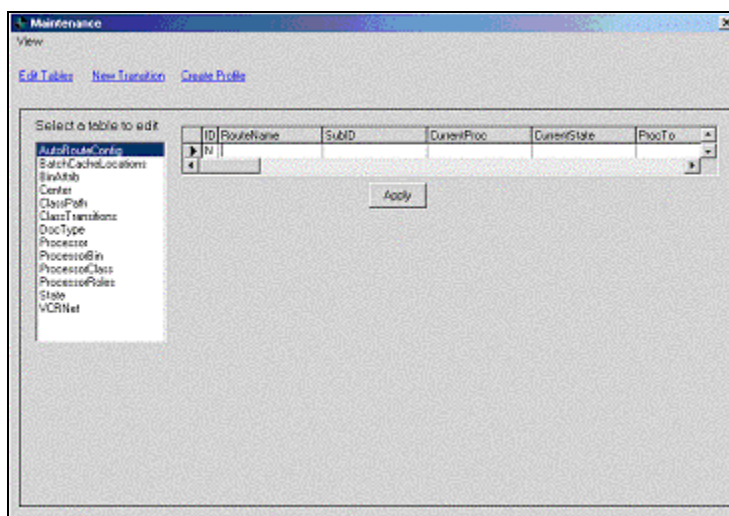
Print ▶ EOB
Image
Both

Center

The Center table is where the center's for a database are created and stored. Below are detailed instructions of how to view and edit, and how to add a center.

To view and edit the Center table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
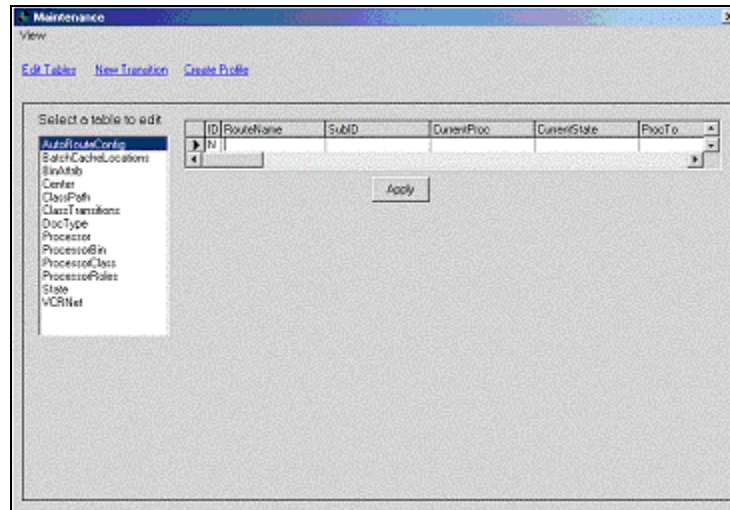

Select the Center table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white. Make the changes that you would like to make in this field, then press **Enter** through the rest of the row or click **Apply**.

To add a new center, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:

Select the Center table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.
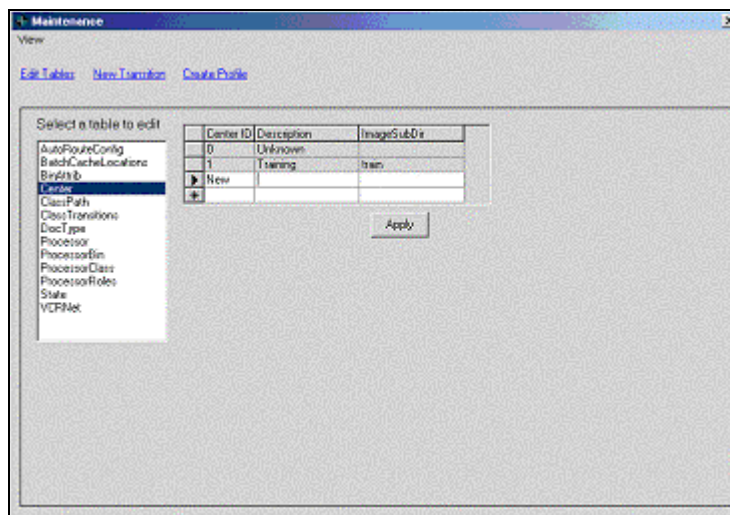
Place your cursor in the Description field of the next available white line. Enter the name of the new center you are adding, and then press **Enter**. Enter the image sub-directory that will be used when documents are scanned into the center into the ImageSubDir field, then press **Enter**.
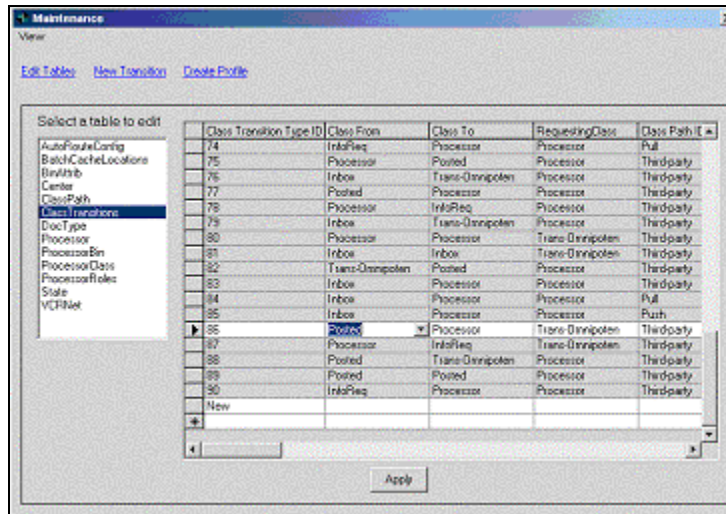
Click **Apply** to save.

Class Transitions

The Class Transition table adds the processor class dimension to the transitions by defining which classes can perform which moves.

Below are detailed instructions on how to view and edit, and how to add a class transition.

To view and edit a the Class Transition table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:

Select the Class Transitions table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

Make the changes that you would like to make in this field, then press **Enter** through the remaining fields on the line or click **Apply**.

To add a new class transition, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
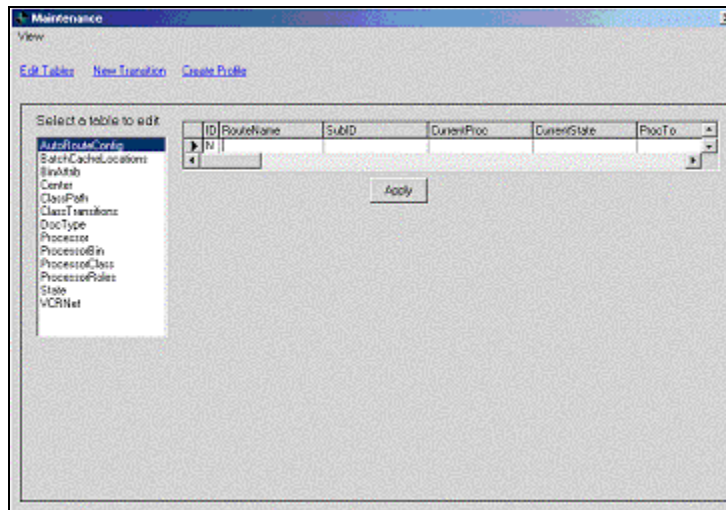

Select the Class Transitions table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

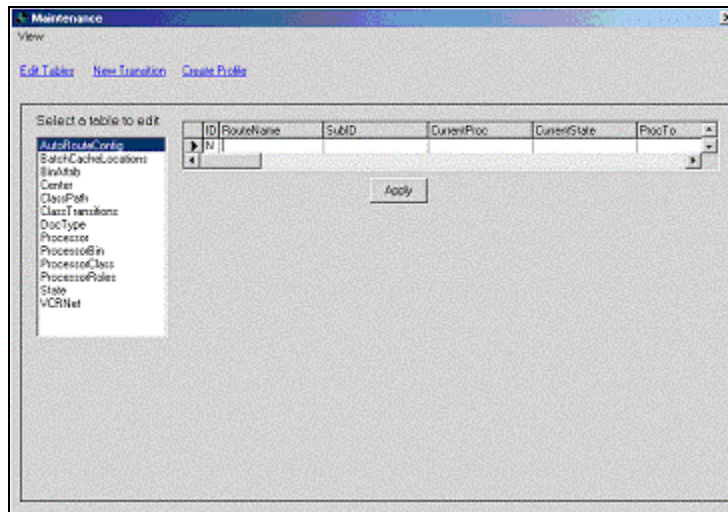Place your cursor into the Class From field on the next available white line. From the Class From drop down menu, select the class that the document will be moving from, then press **Enter**.

Select the class that the document will be moved to from the Class To drop down menu, then press **Enter**.

Choose the requesting class from the Requesting Class drop down menu, then press **Enter**.

Select the class path ID for the transition from the Class Path ID drop down menu, then press **Enter**. There are three class paths' to choose from, all of which are described below:

- Push- Documents are moving from the requestor's bin to a different bin.
- Pull- Documents are moving from a different bin to the requestor's bin.
- Third Party- Document is being moved to and from bins that are not the requestors'.
- Status Change- Document is changing status within the requestor's bin.

If you would like to enter a description for the transition, do so in the Description field, then press **Enter**.

Click **Apply** to save changes.

Document Type

The Doc Type table is used to add and view document types. Documents in MedFlow™ are associated with a certain document type, which is assigned to them when they are scanned into MedFlow™.

Below are instructions on how to both view and edit or add a new document type.

To view or edit a document type, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open displaying all available tables to edit, as shown below:
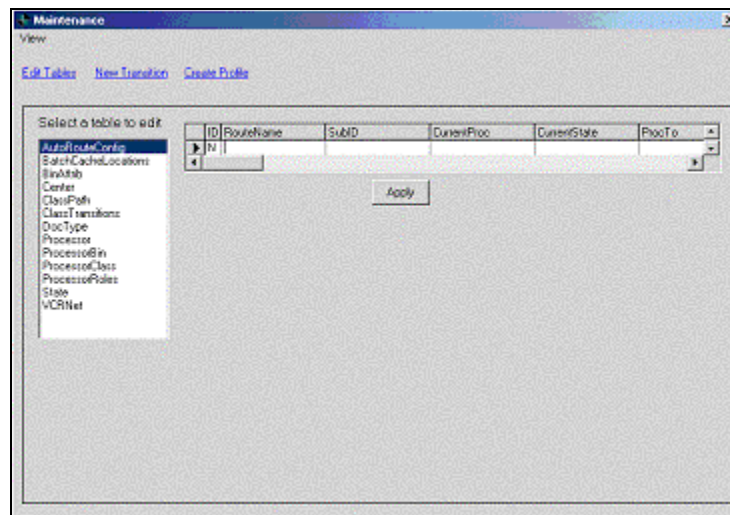
Select the DocType table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Document Type table with all of the existing types displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:
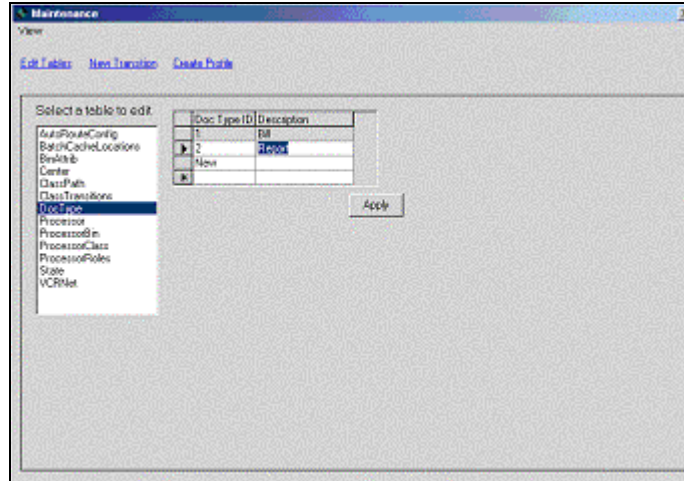
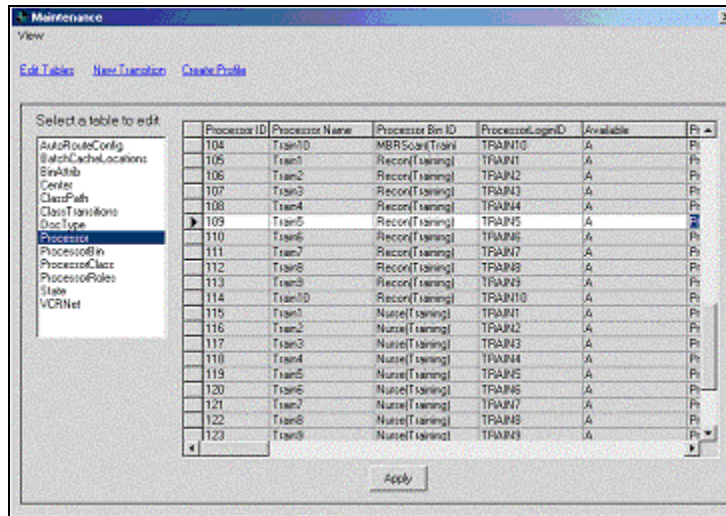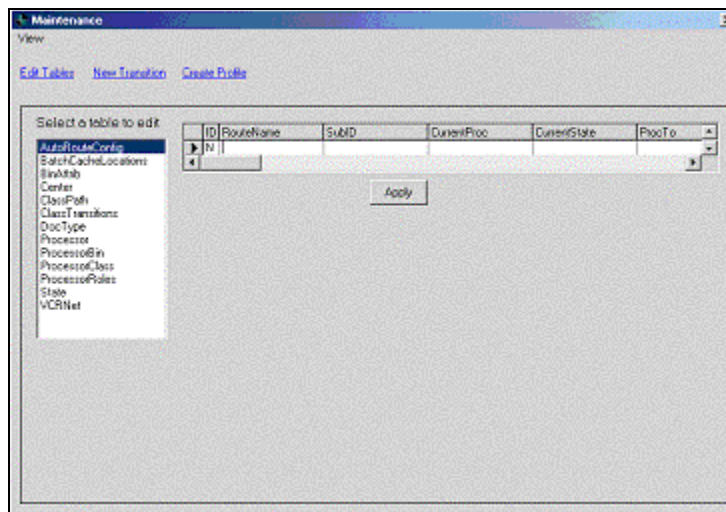Make the changes that you would like to make, then press **Enter** through the rest of the line or click **Apply**.

To add a document type, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen displaying all tables available to edit, as shown below:

Select the DocType table by highlighting it from the list of tables to edit. The existing table properties will display on the right hand side of the maintenance screen.

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Place your cursor into the Description filed for in the next available line, you will notice that the value for the Doc Type ID in this field is automatically set to New and the number will be generated once the Doc Type is saved to the database.

Enter the new document type in the Description field and press **Enter** then click **Apply**.

Be sure to press Enter after entering any value into the fields for them to save, this action sends the entered data to the database

The document type that you just entered will now be saved and highlighted in blue.

Processor

The Processor table is used to create new processors within the system. This is also the table that you would use to take away a processor's access to the system.

Below are detailed instructions of how to view or edit and how to add a new processor.

To view or edit the processor table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open displaying all available tables to edit, as shown below:

Select the Processor table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing types displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

Make the changes that you would like to make, then press **Enter** through the rest of the row or click **Apply**.

To add a new processor, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen displaying all tables available to edit, as shown below:

Select the Processor table by highlighting it from the list of tables to edit. The existing table properties will display on the right hand side of the maintenance screen.

Place your cursor into the Processor Name field for in the next available line, you will notice that the value for the Processor ID in this field is automatically set to New and the number will be generated once the Processor is saved to the database.

Enter the new processor's name into the Processor Name, then press **Enter**.

Select the processor's bin from the Processor Bin ID, then press **Enter**.

If you are creating a processor that is going to have more than one bin or role, you have to create a separate entry into the database for every bin

Select the processor's login ID from the Processor Login ID drop down list, then press **Enter**. This is the same login ID that was created first from the Administration module in Web RePrice™.

Select the letter 'A' from the Available drop down list, then press **Enter**. This functionality will be enhanced for future use; in the meantime the value 'A' should always be used.

Select the class you would like the processor to be included in from the Processor Class ID drop down menu, then press **Enter**. This allows for different levels of access for processors. For example, a processor would be in a different class than a manager.

Select the absent type of the processor, then press **Enter**. Present allows the processor access to the system, Absent enters them into the system but does not allow them access until this field is set to Present, and Deleted is used when a processor is to be deleted from the system.

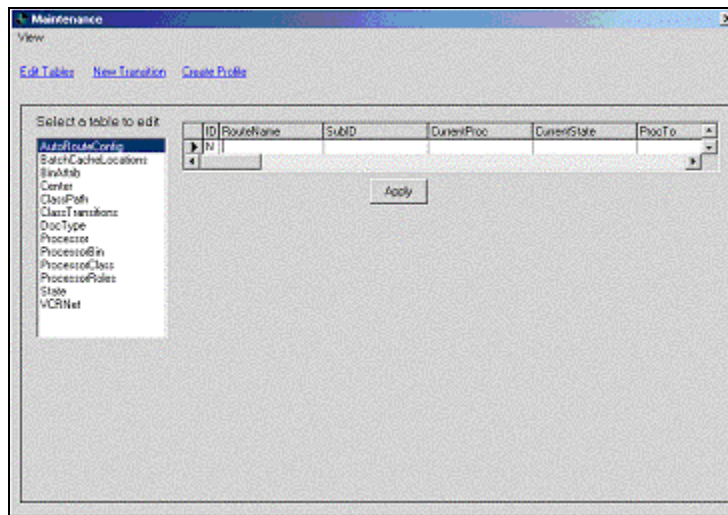Finally, click on the **Apply** button to save all changes.

Processor Bin

The Processor Bin table is used to create and associate bins to a processor. These will be the bins that the processor is able to access when they log into the system.
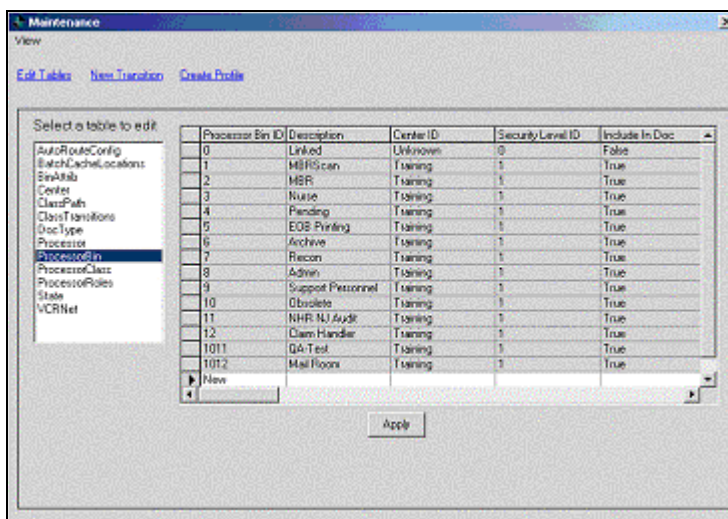
Below are instructions on how to both view and edit or add a new processor bin.
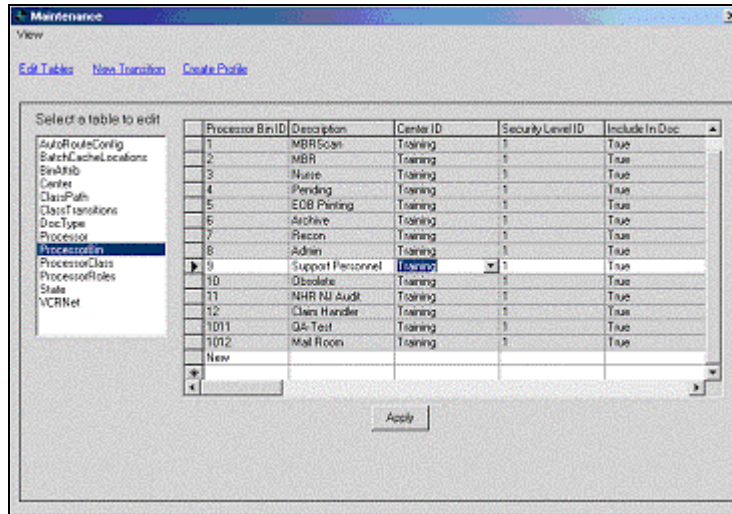
To view and edit a processor bin, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open displaying all available tables to edit, as shown below:

Select the Processor Bin table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Processor Bin table with all of the existing bins displayed.

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To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue and un-editable to editable and white, as shown below:
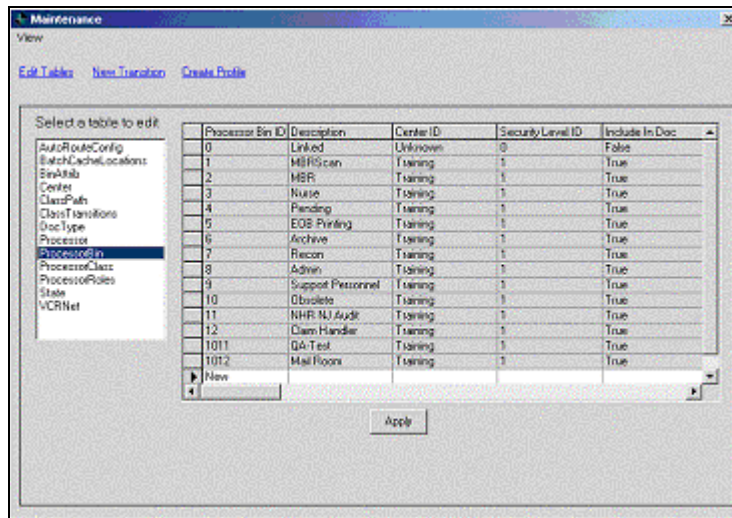

Make the changes that you would like to make in the field, then press **Enter** through the remaining fields or click **Apply**.

To add a new processor bin, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open displaying all available tables to edit, as shown below:

Select the Processor Bin table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Processor Bin table with all of the existing bins displayed.

Place your cursor into the Description field on the next available line. You will notice that the value for the Processor Bin ID for this line is automatically set to New, upon saving the line this will be changed to an auto-generated number.

Enter the name of the bin you are creating into the Description field, and then press **Enter**.

Select the center for this bin from the Center ID drop down menu, then press **Enter**.

In the Security Level ID field select the value 1 from the drop down menu, then press **Enter**. The functionality of this field is being developed therefore at this time only the value 1 should be entered here.

The Include In Doc field is used to determine whether or not the documents in this bin are included in the center's count. To include these documents into the count, select True from the drop down menu, if you would not like to include them select False, then press **Enter**.

The Auto Create Docs field is a setting determining whether or not the bin will have the auto create functionality on or not. To auto create documents in the bin, select 1 from the drop down menu, if you would not like to auto create documents for this bin select 0, then press **Enter** and **Apply**. This is used when other applications request the next document from MedFlow™.
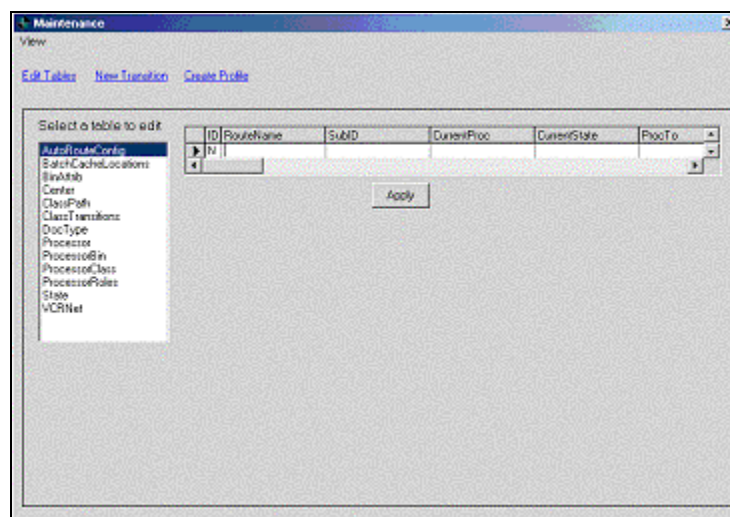
Processor Roles

The Processor Roles table allows you to edit, view and add processor roles for a certain processor ID. Completing this table is one of the steps in allowing a processor to log into the system with a certain role.

Below are detailed instructions how to view and edit or how to add a processor role.
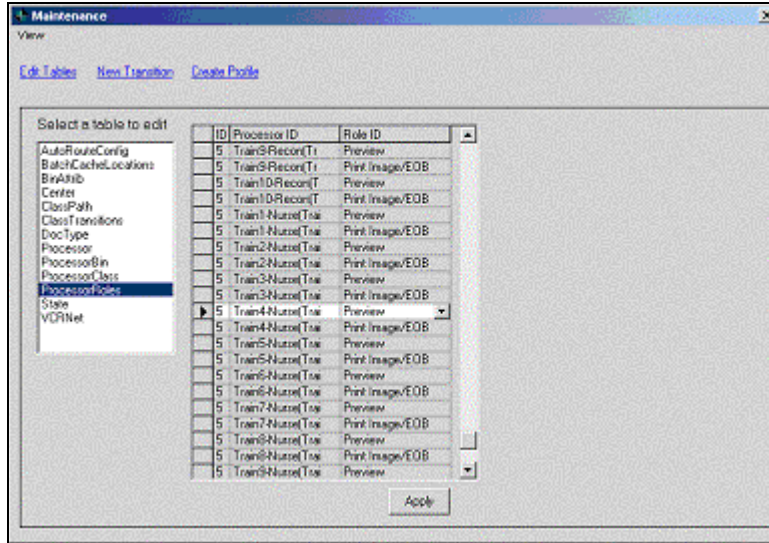
To view or edit the existing processor roles table, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:

Select the Processor Roles table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Processor Roles table with all of the existing roles displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

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Make the changes that you would like to make in the field, then press **Enter** through the rest of the row or click **Apply**.

To add a new entry to the processor roles table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:
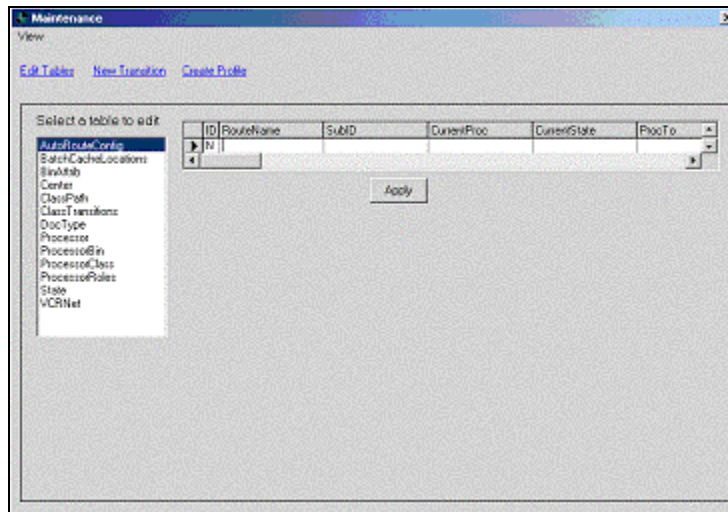
Select the Processor Roles Table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Processor Roles table with all existing roles displayed.
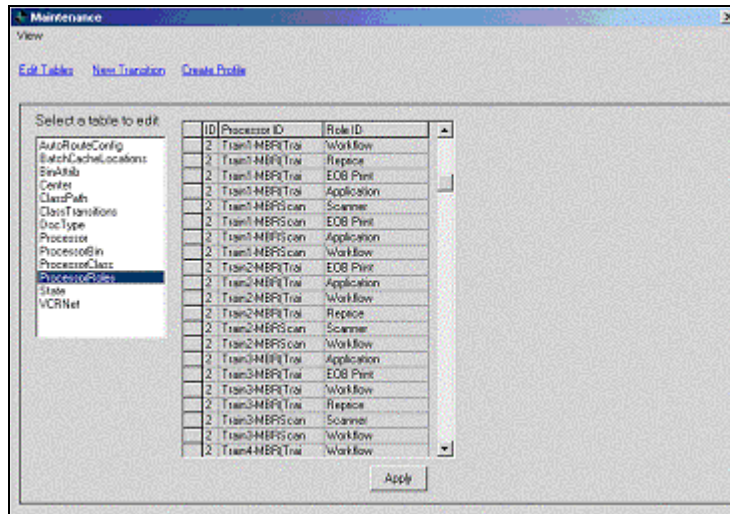
Place your cursor into the next available Processor ID field, next to the ID field that has the entry New. Enter the processor's ID that you would like to assign a role to from the Processor ID drop down menu, and then press **Enter**.

In the Role ID field select the role you would like to assign from the drop down menu, then press **Enter** then click **Apply** to save.
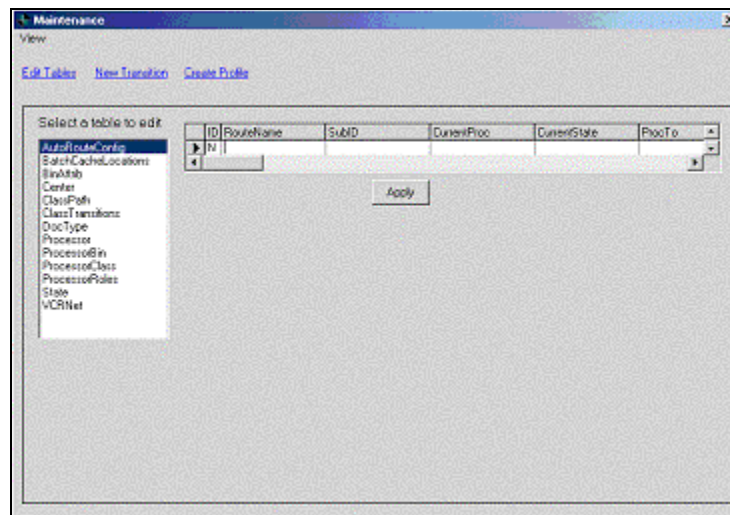
Processor Class

The Processor Class table is used to create classes that are used when grouping processors. Creating classes is done for security purposes and to create different levels of access to the system.

Below are detailed instructions on how to view and edit or how to add a new class.

To view and edit the Processor Class table, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit tables screen will open displaying all available tables to edit, as shown below:
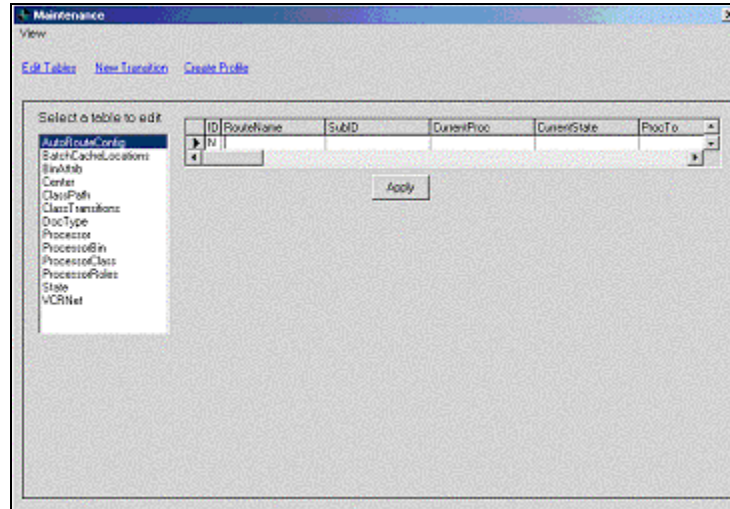
Select the Processor Class table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the Processor Class table with all of the existing entries displayed, as shown below:
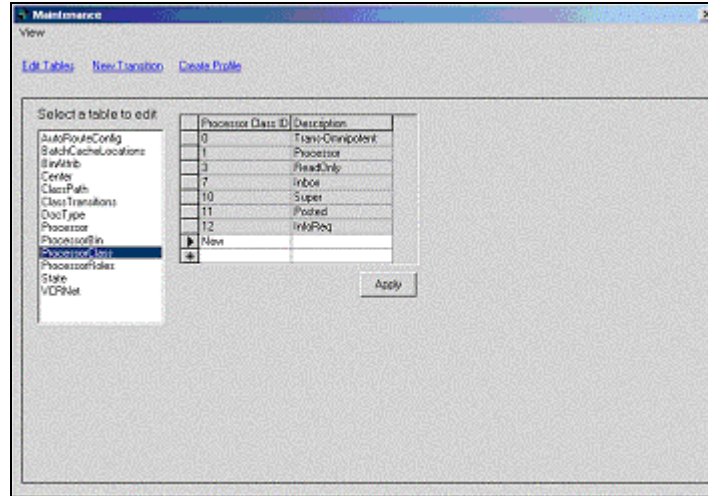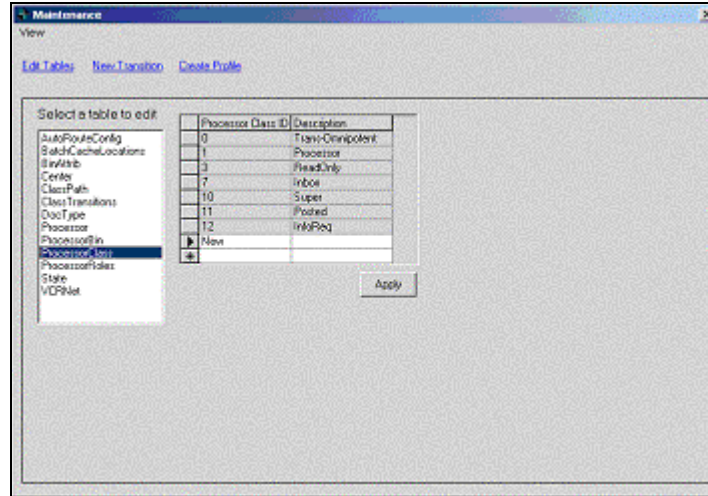
To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white. Make the changes that you would like to make, then press **Enter** through the rest of the row or click **Apply**.

To add a new processor class, follow the steps below:

From the maintenance screen, click on the Edit Tables link. The Edit Tables screen will open inside of the screen displaying all tables available to edit, as shown below:

Select the Processor Class table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed, as shown below:

Place your cursor into the Description field on the next available line. Enter the name of the processor class, then press **Enter** and click **Apply**.
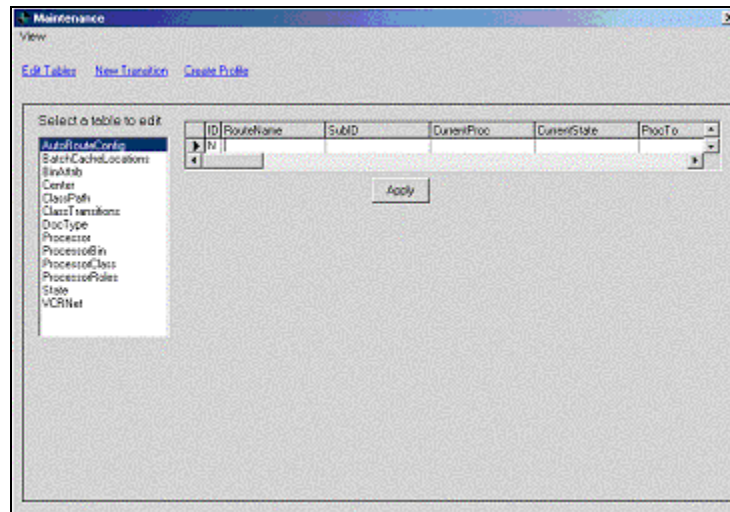
State

The State table is the table that defines the statuses of a document within a specific bin.

Below are detailed instructions of how to view or edit and how to add a new state.
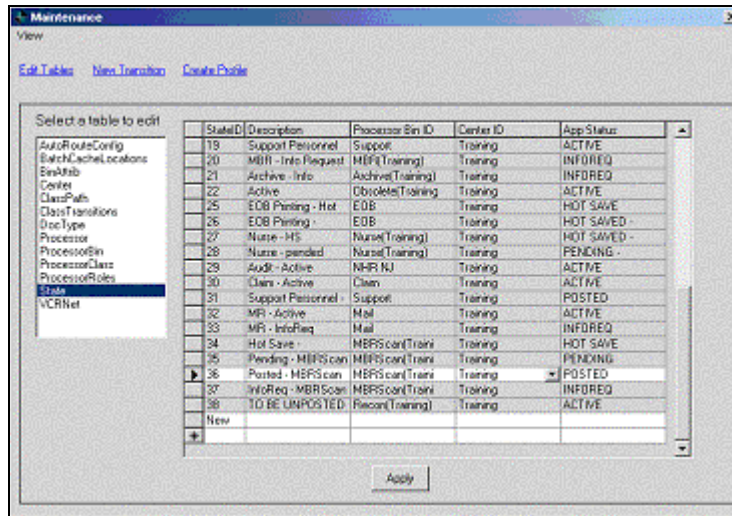
To view and edit the State table, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:

Select the State table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:

Make the changes that you would like to make in the field, then press **Enter** through the rest of the line or click **Apply**.

To create a new entry to the State table, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:
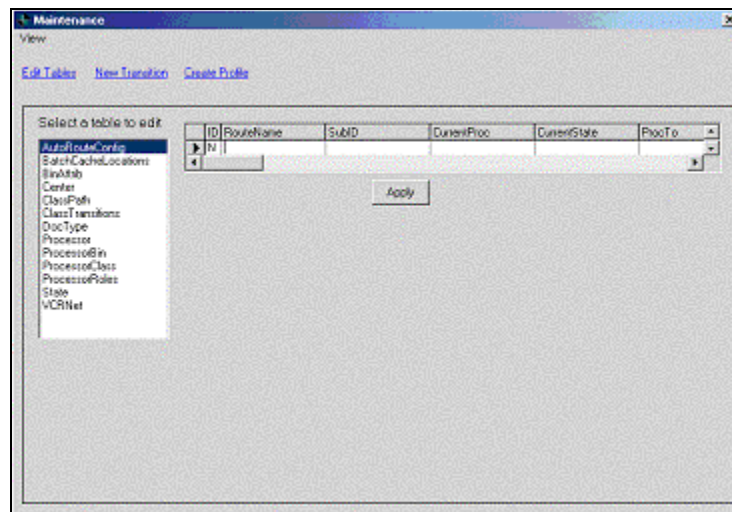
Select the State table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing entries displayed.

Place your cursor into the next available Description field, next to the StateID field that has the entry of New. Enter a description or name of the new entry, then press **Enter**.

Select the processor bin from the Processor Bin ID drop down menu that you are creating the entry for, and then press **Enter**.

Select the center from the Center ID drop down menu, then press **Enter**.

Select the status from the App Status drop down menu, then press **Enter** and click **Apply**.

Reminder: If you would like more than one state to be allowed within or moved to a specific bin you must create an entry for each status'
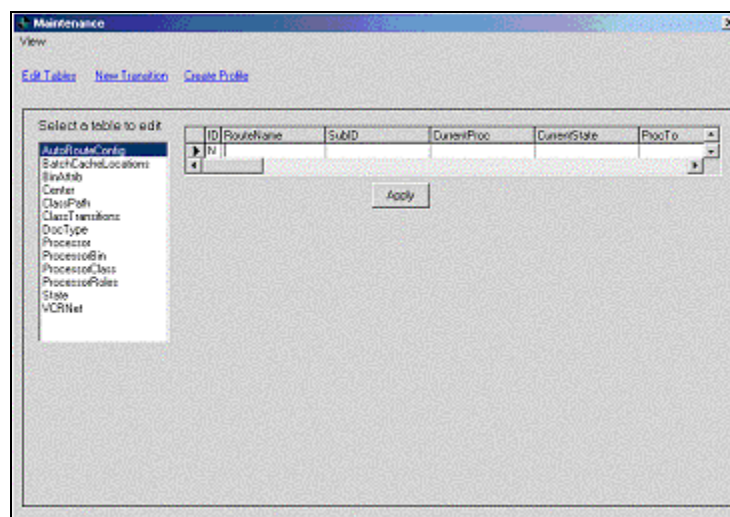
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VCR Net

The VCR Net table is used when bills are not scanned into the system rather they are auto created. This table holds the properties of these auto created documents.

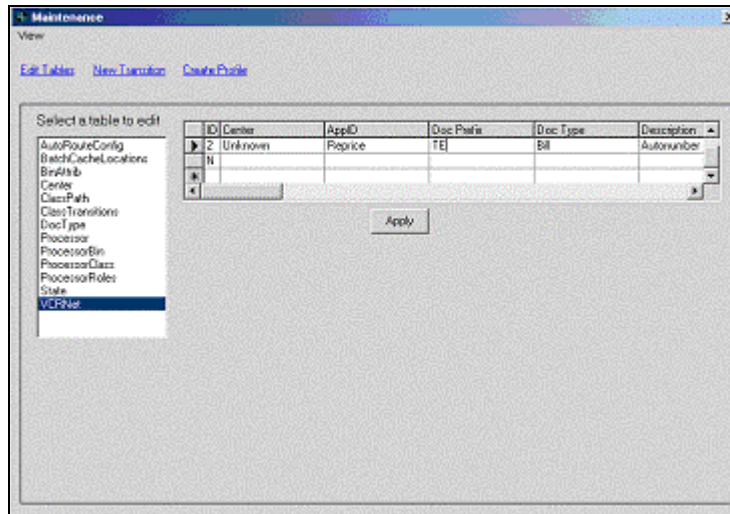Below are detailed instructions on how to view or edit and create new auto created document properties.

To view and edit the VCR Net table, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:

Select the VCR Net table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing roles displayed.
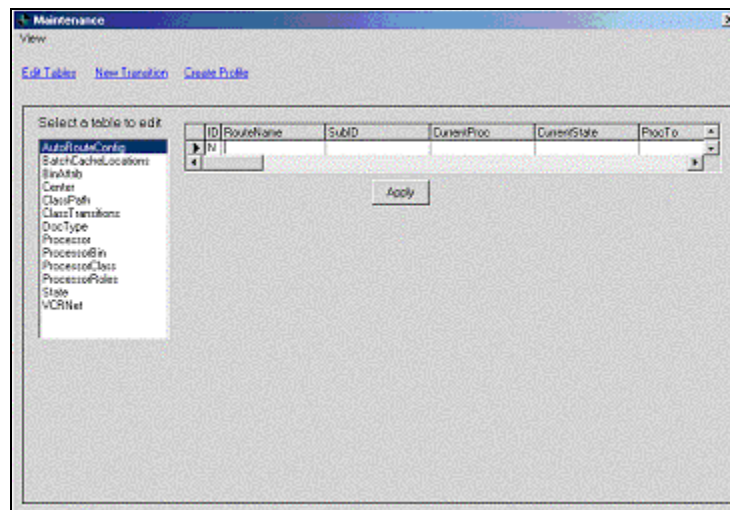
To edit an existing entry, double click on the row that you would like to edit, the entire row will then change from being highlighted in blue to editable in white, as shown below:
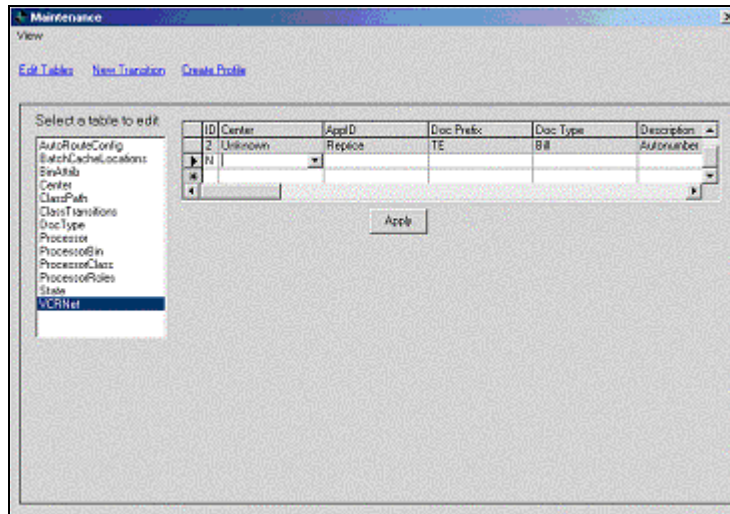
Make the changes that you would like to make, then press **Enter** through the rest of the line or click **Apply.**

To create a new entry to the VCR Net table, follow the steps below:

From the maintenance screen click on the Edit Tables link. The Edit Tables screen will open inside of the maintenance screen, displaying all tables available to edit, as shown below:

Select the VCR Net table by highlighting it from the list of tables to edit, located on the left hand side of your screen. This will open the table with all of the existing roles displayed.

Place your cursor into the next available Center field, next to the ID field that has the entry of 'New'. Select the center for this line from the drop down menu, then press **Enter**.

Select the application ID for this line from the AppID drop down menu, then press **Enter**.

Enter the document prefix into the Doc Prefix field, then press **Enter**. The Doc Prefix is the beginning two letter(s) that will prefix the document ID when a bill is auto created. Currently this field must have the value of two letters, using any other characters will give errors when trying to auto create.

Select the document type from the Document Type drop down menu, then press **Enter**. This field determines the type of document that will be auto created.
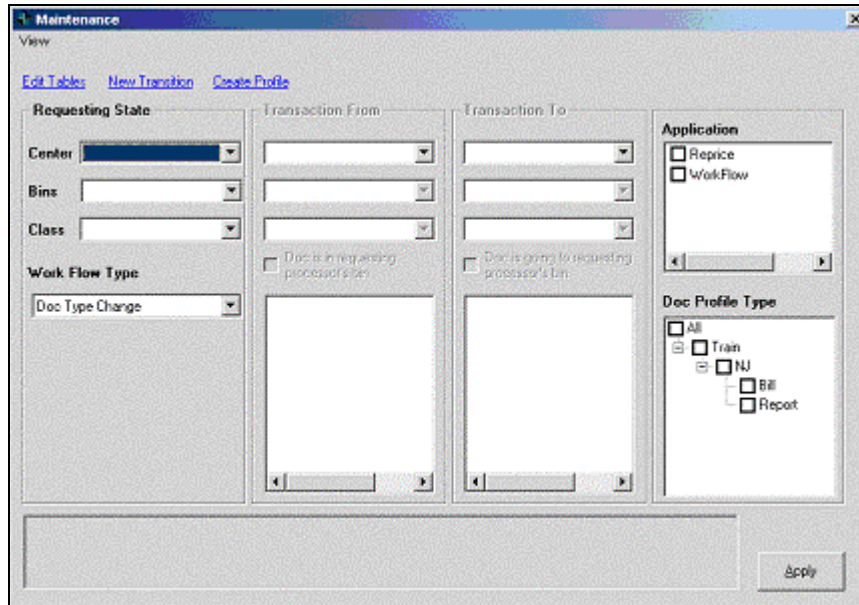
Enter a description into the Description field, then press **Enter** and click **Apply**.

New Transition

The New Transition screen defines the valid states that a document can be moved from and to, depending on its current state.

To add a new transition, follow the steps below:

From the MedFlow™ Manager Maintenance window, click on the New Transition link and the transition screen will open, as shown below:

Enter the information for the Requesting State by selecting the following criteria:
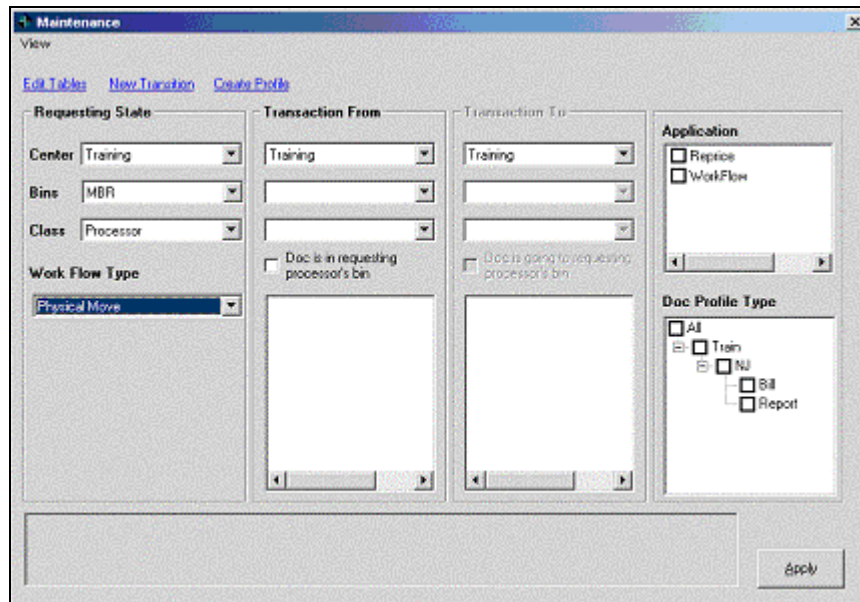
Select the center that the processor making the move is located from the Center drop down menu, and then press **Tab**.

Select the processor's bin who will be making the move from the Bin drop down menu, then press **Tab**.
From the Class drop down menu, choose which class of processor that will be doing the move, then press **Tab**.

Finally, choose the workflow type, and then press **Tab**. There are 3 choices in the drop down menu, all described below:
- Doc Type Change- This selection is chosen when you are creating a transition for changing a documents profile.
- Physical Move- This selection is chosen if you are creating a transition for physically moving documents between bins.
- Subscription Move- This selection is used in conjunction with the Binder view, which is currently under development, therefore should not be chosen.

Once the Requesting State information is entered the Transaction From area will become editable, select the following criteria from this section:
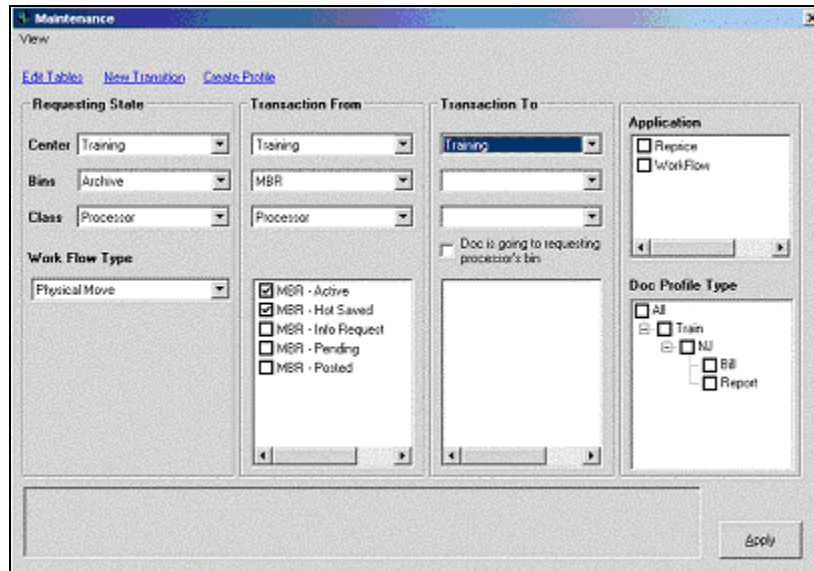
From the Center drop down menu, select the center that the documents will be moved from, then press **Tab**.

From the Bin drop down menu, select the bin that the documents will be moved from, then press **Tab**.

From the Class drop down menu, choose which class the documents will be moved from, then press **Tab**.
If the document will be located in the requesting processor's bin, check off the check box, otherwise leave blank.

In the Transaction From Status box select the status or statuses that the document will be saved as by placing a checkmark in the corresponding checkbox, then press **Tab**.

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Once the Transaction From section is completed, the Transaction To section will become editable, select the following criteria from this section:

From the Center drop down menu, select the center that the documents will be going to, then press **Tab**.

From the Bin drop down menu, select the bin that the documents will be going to, then press **Tab**.

From the Class drop down menu, choose which class the documents will be going to, then press **Tab**.

If the document will be located in the requesting processor's bin, check off the check box, otherwise leave blank.

In the Transaction To Status box select the status that the document will be saved as by highlighting the status, then press **Tab**.
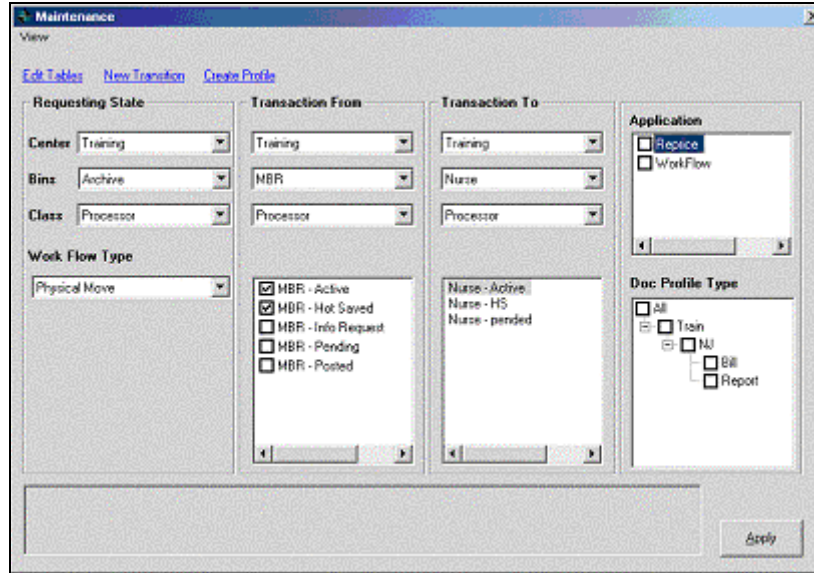
Select which applications the new transition will apply to by placing a checkmark into the corresponding checkbox, then press **Tab**.
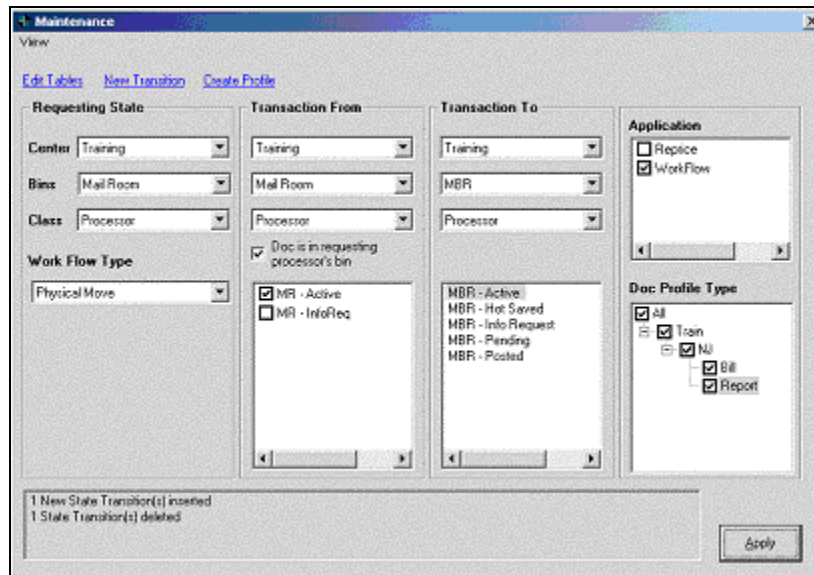
From the Doc Profile Type window select which document profiles this transition will be affecting by placing a checkmark into the corresponding checkbox, then click **Apply**.
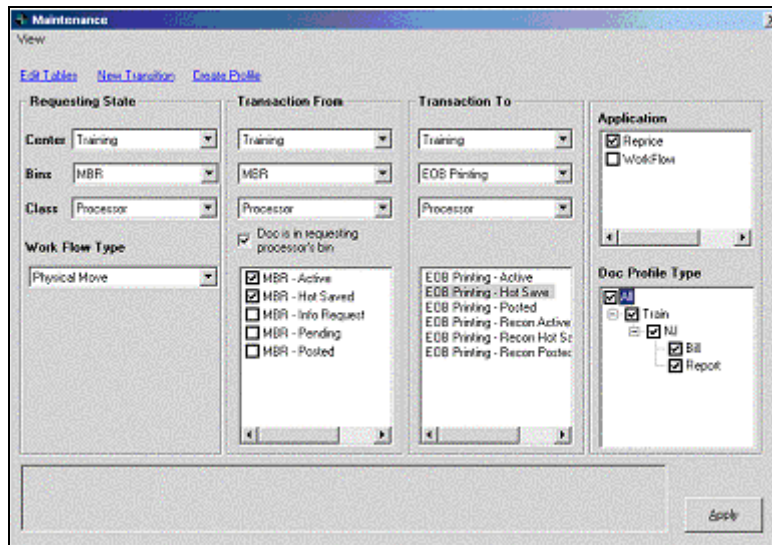
The grey box located to the left of the Apply button is the status box. You may look here to view the status of the transition after you click Apply.

To close the transition window use the X button on the right-hand side of your screen.

Example: Below is an example of a transition that was created to allow an active document in a mailroom bin to be moved to an MBR bin as active.

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Requesting State:
- Center: Training
- Bins: Mail Room
- Class: Processor
- Work Flow Type: Physical Move

Transaction From:
- Center: Training
- Bins: Mail Room
- Class: Processor
- Doc is in requesting processor's bin is selected
- MR- Active is selected

Transaction To:
- Center: Training
- Bins: MBR
- Class: Processor
- MBR- Active is highlighted

Application:
- Work Flow

Doc Profile Type:
- All selected

Create Profile

The Create Profile section of MedFlow™ Maintenance allows you to search and create profiles within a database. You are able to create a new profile from scratch or you can create a profile by cloning an existing one.

Below are detailed instructions on how to create a new profile and how to create a cloned profile.
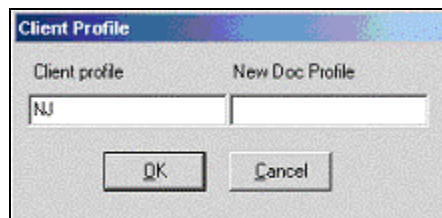
To create a new profile, follow the steps below:

From the maintenance screen click on the Create Profile link. The create profile screen will open inside of the maintenance screen, as shown below:
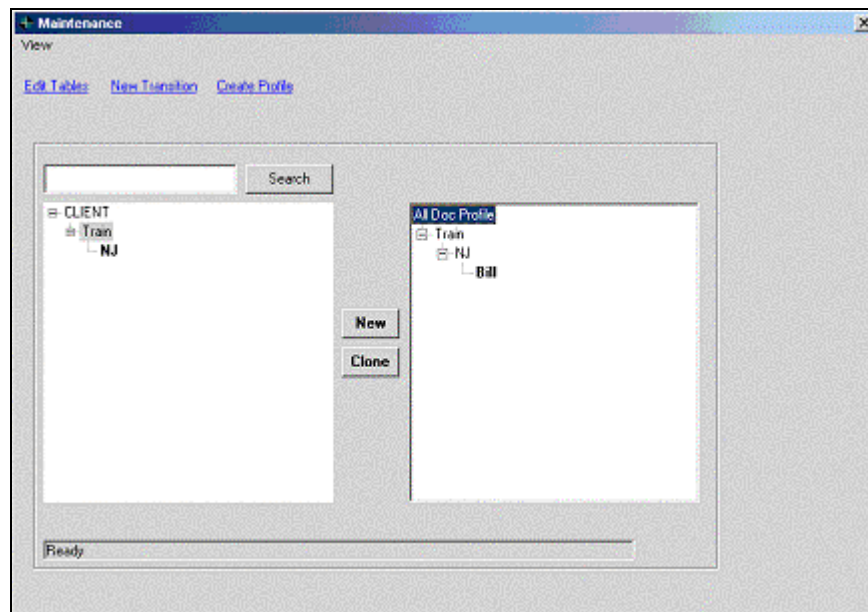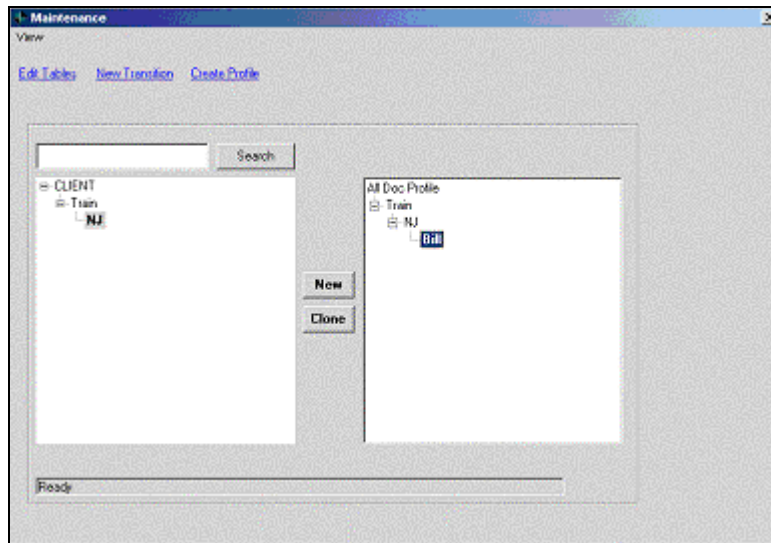

From the Create Profile screen, highlight which client you would like to create a new profile for. This selection is made within the client tree located on the left side of the screen. You may either expand the tree or search for a specific client using the search field and button.

Click on the 'New' button and the Client Profile window will open on your screen, as shown below:

The client profile that you had highlighted on the maintenance screen will be automatically entered into the Client Profile field. Enter the new document profile name into the New Doc Profile field, and then press **OK**. Click the **Cancel** button to cancel the creation of a new Client Profile.
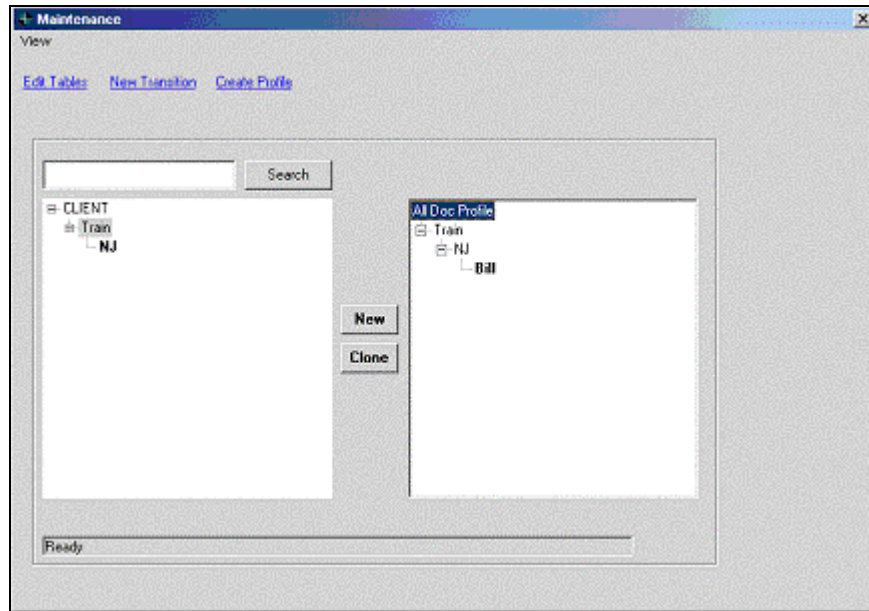
The Client Profile window will close and the newly created profile will display in the profile tree to the right of the screen, as shown below:


There is a status bar at the bottom of the maintenance screen that displays the status of the create profile screen. If, while creating a new profile an error has occurred, a message will display in this section.

To create a new profile using the cloning functionality, follow the steps below:
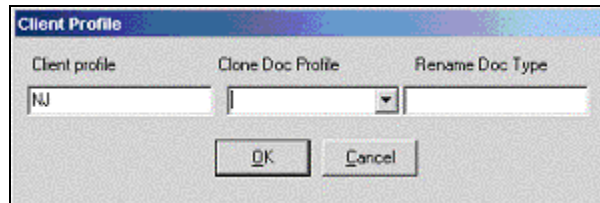
From the maintenance screen click on the Create Profile link. The create profile screen will open inside of the maintenance screen, as shown below:

From the Create Profile screen, highlight which client you would like to create a new profile for. This selection is made within the client tree located on the left side of the screen.
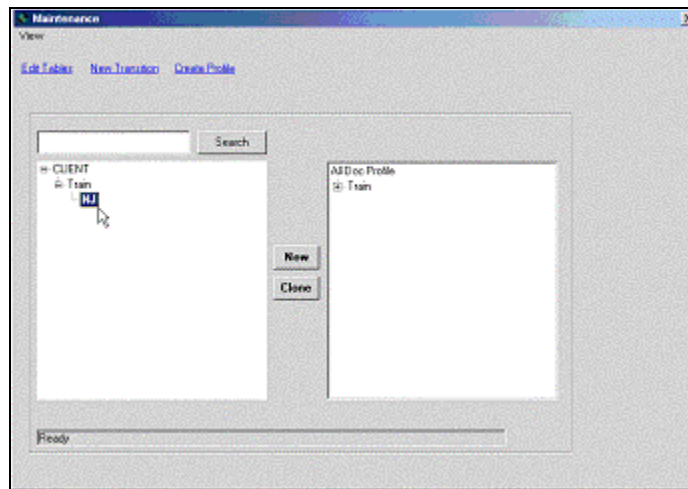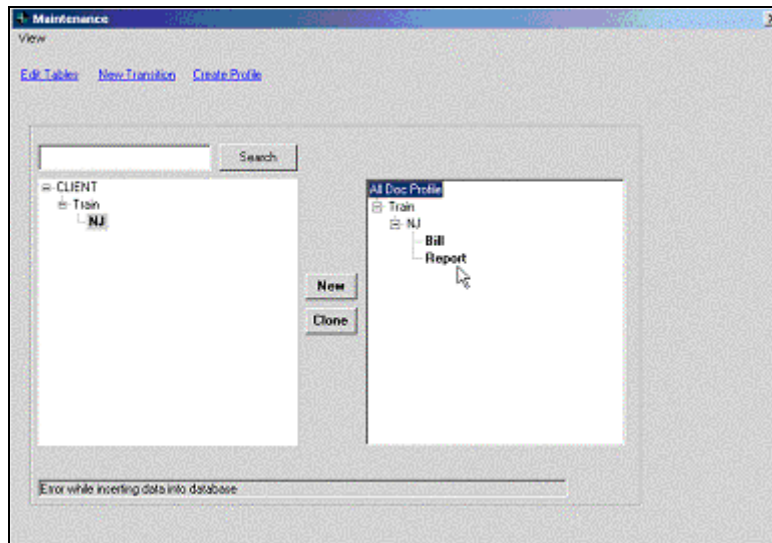

Click on the Clone button and the Client Profile window will open on your screen, as shown below:

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The client profile that you had highlighted on the maintenance screen will be automatically entered into the Client Profile field. Select the Doc profile that you would like to clone from the Clone Doc Profile drop down box, and then enter the name of the new document type in the Rename Doc Type field. Press OK to save the new profile.

The Client Profile window will close and the newly created profile will display in the profile tree to the right of the screen, as shown below. This new profile now has the same transitions and settings as the profile from which it was cloned.

There is a status bar at the bottom of the maintenance screen that displays the status of the create profile screen. If, while creating a new profile an error has occurred, a message will display in this section.

MedFlow™