Media Manager Scanning for Research

This tip sheet is for Research Study Staff who need to scan in documents related to research studies.

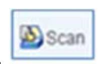
Tips to Prepare Documents before Scanning

- The recommended maximum numbers of pages to scan through Media Manager is 10-15.
- Remove tape, sticky notes, staples, paper clips and anything else that will interfere with scanning.
- Verify that any multipage documents are in the correct page order.
- Orient all pages to have the page tops in the same direction, and the front of the page in the same direction.
- Separate out documents with problem colors or paper types, so they may be scanned using special scanner settings (scan formats). Testing is required for each type, color, size, etc. of document type to determine if they need to be separated out or can be scanned in a single batch.

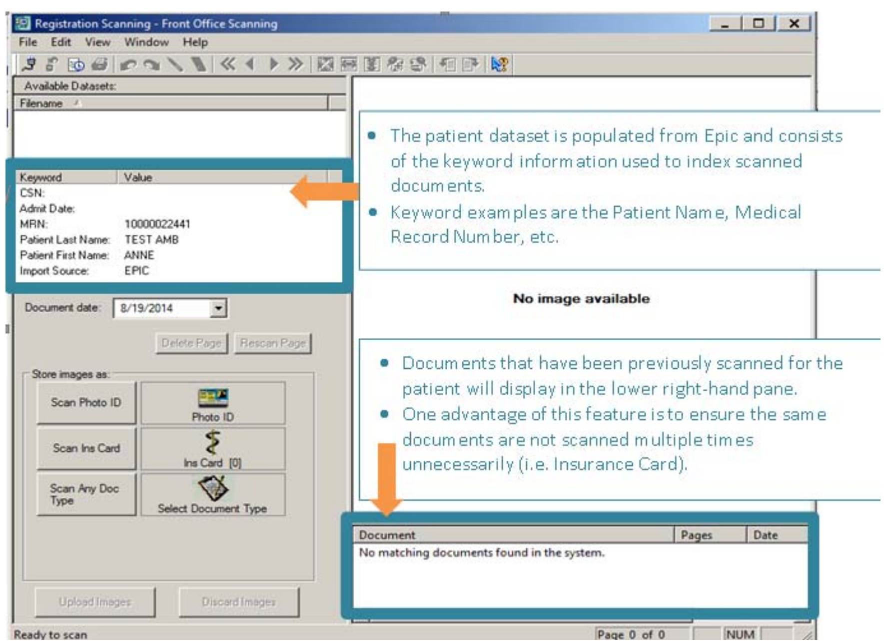
Scanning Steps

1. **Click the Media Manager button on the Hyperspace toolbar.** 

   - ***Note*** *– If the button is not on your Hyperspace toolbar, Media Manager is also accessible by clicking the **Epic button** > **Patient Care** > **Media Manager.***
2. **Type in the patient identifiers to search for your patient in the Patient Lookup window.**
3. **Choose what level to scan the document to. Select patient level for Research Consent forms.**

   - ***Note*** **-** *Through Media Manager you can scan to the Patient, Encounter, and Order levels. For Research Consents choose Patient level.*
4. **Select the Scan button in the toolbar to launch the Front Office Scanning module**. 

   - ***Note:*** *Although it may not be noticeable, the new window that opens up is the OnBase application.*

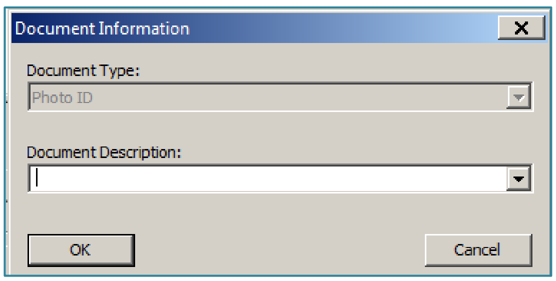


5. **Place the document in the scanner with the appropriate orientation for the scanner you are using.**

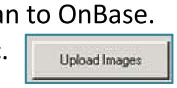
- When scanning Insurance Cards or any type of ID cards, place the card directly into the scanner in the same manner. The card will be pulled through the scanner. There is no need to photocopy the document prior to scanning.

6. **Select the appropriate document type, such as Scan Photo ID, in the "Store Images As" section**
   - These buttons are pre-configured to scan in black & white or color, and to scan either one side of the page (simplex) or both sides of the page (duplex).
   - Once the button is clicked, the document will be pulled through the scanner.
   - After the document is scanned, the document will display in the upper right-hand pane of the window.
   - If you are not satisfied with the currently displayed image, you can select *Rescan* or *Delete* to correct the page.

7. For Research select the document type 'Consent – Research'.
8. To begin Indexing, select the appropriate document type button, (for example, Photo ID) in the lower left-hand pane to assign that document to a document type.
9. Enter a Document Description (this is free text) and select OK.



- **Note**: Once the document has been assigned to a document type, it will appear as a line item in the lower right-hand pane of the Front Office Scanning viewer.
- A checkmark will appear on the document type button when clicked.
- Continue scanning and indexing additional documents for that patient.

10. Select Upload Images in the bottom left-hand corner to upload the scan to OnBase. The scanned documents and descriptions will then be viewable in Epic. 

Note- Depending on what you are scanning, you may need to choose and accept the Note Author before it is uploaded into Epic. If this pops up, it is required to complete the process.

Tip – If mistakes are made during indexing, instead of clicking Upload Images, you can click Discard Images in the bottom left-hand corner and start over again.

Next Steps:

- If there are other documents to scan to the *same patient*, start at step **3**, and continue.
- If there are other documents to scan to a *different patient*, start the process from step **1**.