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## Linking, Importing, and Scanning Attachments

Starting with SOS Release 2009.01, both SOS Office Manager and SOS Case Manager provide for an unlimited number of *attachments* to be associated with each patient. Attachments can be documents that are scanned directly into the database (assuming that you have a compatible<sup>1</sup> scanner connected to your computer) or any files to which you have access, including, but not limited to:

- w Word processing documents
- w Adobe Acrobat documents
- w Graphics files, including photographs and fax files
- w Spreadsheets
- w E-mail messages (exported to individual files)
- w Previously scanned paper documents such as letters

You can specify the attachment as a simple link to the existing file, or you can save a copy of the attachment in the SOS database and either retain or delete the original file.

There are some significant advantages to storing the attachment in the database. Firstly, once in the database, the attachment is secure. Only those who have been granted access to the patient's records in SOS will be able to view, modify, or print the attachment. Secondly, because the attachment is in the database, if you are using SOS from a different computer, or even from a remote location, you can still access the attachment, even though you might otherwise not be able to get to the original document location. Finally, once imported, the attachment is backed up with the rest of the SOS database. You do not have to worry about also backing up other folders on your system to be sure that your attachment is safe.

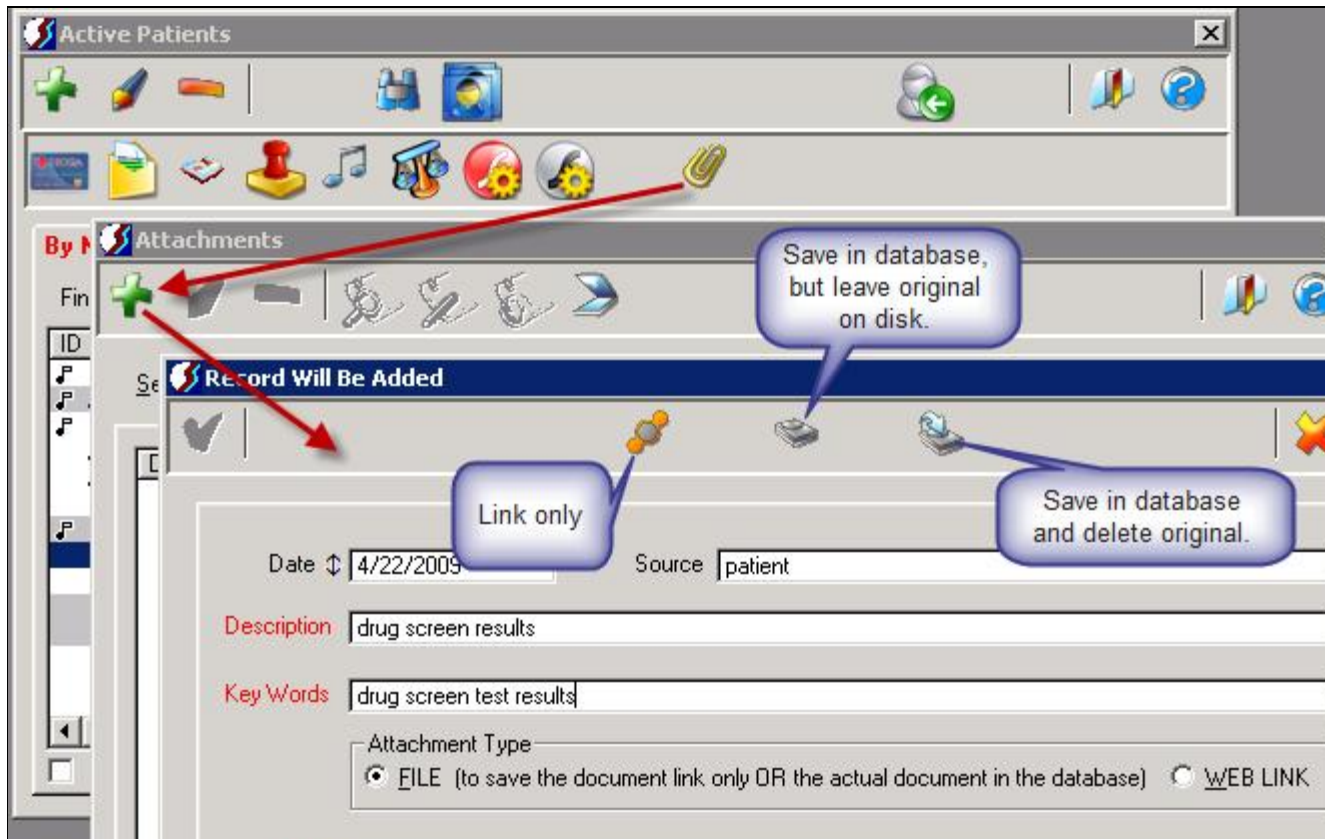
SOS also permits you to specify the URL (internet address) of a web page as an "attachment".

Once an attachment has been imported or linked, you can view it, edit it, or delete it by highlighting the attachment in the list and then clicking the appropriate icon in the windows's toolbar. If the document is stored in the database, it will be extracted temporarily to your system's designated temporary folder for viewing or editing.

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<sup>1</sup> Your scanner must be WIA or TWAIN compatible, and all relevant drivers must be installed.

## Creating an Attachment



1. In OM, highlight the patient in the **Active Patients** list and click the **Attachments** icon (paper clip) in the toolbar. In CM, select the **Attachments** icon (paper clip) in the panel on the right after opening a patient record.
2. The patient's list of attachments will appear.
3. Click the **Add** button.
4. Enter a meaningful description and keywords you might use to search for this attachment in a long list.
5. Indicate whether you are attaching a document (or other type of file) or a link to a page on the internet. The prompt preceding the next field will change to reflect your selection here.
6. If the attachment is just a link to a web page, enter, or even better, copy and paste the address from your web browser after navigating to the desired page.
7. If your attachment is a file, such as a word processing document, spreadsheet, graphic, or image file, use <F2> or right-click in the *File* field to select the desired file.
8. To complete the process, select the attachment method. If your attachment is a Web Link, the only available method will be **Link Only**, so select that button. If you

are attaching a file, but simply want to create a link to a file located on your system, you should also use the **Link Only** button. Use **Store in DB** if you want to save a copy of the file within the SOS database, but do not want to remove the copy already on your system. The final option, **Store in DB & Delete Original** also stores a copy of the file in the SOS database, but after verifying that the file has been stored without error, it removes the original file from your system. This option is appropriate in environments where security is especially important. Even if someone were to gain access to your computer, he or she would still have to gain access to SOS in order to see the attachment.

ⓘ **Network users please note:** If you link to a file rather than storing it in the database, make sure the file is located in a shared folder that would be accessible to other users on your system. Linking to a file located on your own hard drive may mean that only those using your computer would be able to use the link to view the attachment. In most cases it is recommended that you store the attachment in the database instead of just linking to an external file.

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## Scanning a Document Directly into the Database

If the desired attachment is available in paper rather than electronic form, you can scan it directly into the database using a scanner that supports the industry-standard TWAIN interface. Scanners that are not TWAIN compatible, but support the Windows WIA interface may also be used, but you won't have access to advanced features like duplex (two-sided) scanning. If your scanner does not support either of these industry standards, you will not be able to control the scanner from within SOS. Instead, you will have to scan your document using the scanner's own software, then attach the file as described above.

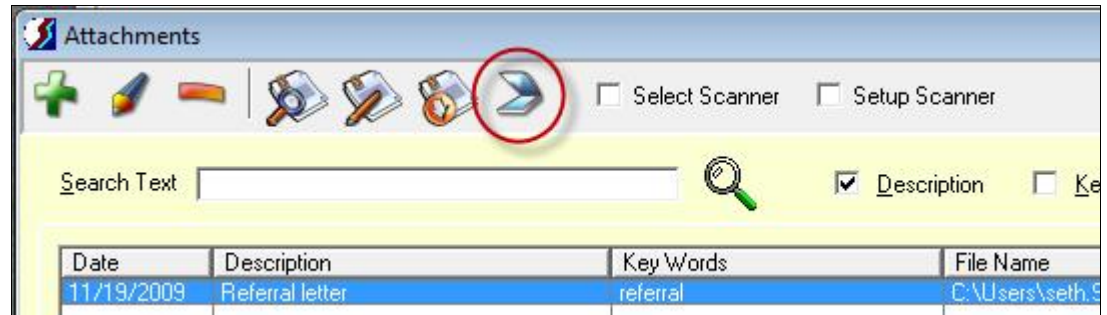
By default, scans will be 8.5 x 11. If you will be scanning card-sized documents, such as insurance cards, you can set and adjust the scanning area from **Setup > System Options**, at the bottom of the **Other** tab. While there, indicate whether your unit supports duplex scanning. If you are able to use only the WIA driver, then check the appropriate option in that panel.

Although many other scanners should work fine, if purchasing a new unit specifically for scanning insurance cards, SOS recommends the DocketPort 687. Among full page scanners that have been tested are:

- HP Multi-function OfficeJet J4580
- "Neat" brand portable scanners
- Visioneer OneTouch flatbed scanner
- DocketPort 485 (replaced by 487) which is a duplex, full-page scanner that also supports scanning card-size documents
- DocketPort 687 duplex card scanner

Network-based scanners may NOT work with SOS. Non-compliant scanners like the Fujitsu ScanSnap series cannot be controlled from the SOS software, requiring that

you scan using the manufacturer's software, then attach the resulting file in SOS as a separate step.



1. Place your document in the scanner according to the hardware directions.
2. If you have more than one scanner connected to your computer, check the option to the right of the icon, *Select Scanner*.
3. If you have not used this feature before, or this is a new scanner, then check the second option, *Setup Scanner*. Doing so will allow you to choose from your scanner's available options and gives you more control over the output. For example, you will probably want to be sure that your dpi (dots per inch) value is not set any higher than 200 to 300 dpi. Higher values will result in much slower scanning speeds without significantly improving the readability of text documents. Every scanner is different, so it may take some experimentation to come up with the best settings for your situation.
4. Click the **Scan** icon on the toolbar (shown in the figure above).
5. SOS will open your scanner control window, if you have checked the *Setup Scanner* option, or immediately start scanning if you have not.
6. The scan will be saved as a pdf document and open in Adobe Acrobat Reader, assuming it is installed on your system. After you have confirmed that the scan was successful, you can close the Acrobat window.
7. You will now be at the attachment form. Enter an appropriate description and some keywords to help you locate the document in the future. SOS automatically assigns a file name. **DO NOT CHANGE THIS FILENAME!**
8. Click the **Store In Database and Delete** icon (the one on the left) or press <Alt>-D to save the scanned image in the database and remove the temporary file from the disk.

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## Scanning Insurance Cards

Beginning with SOS Release 2009, there is a **Scan** icon on the Insurance Policy form in OM that you can use to scan a patient's insurance card, as well as an icon to

open the patient's attachments list to view a previously scanned card or any of the patient's other attachments. The scanning operation works exactly as described above.

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## Opening an Attachment

There are two ways to open an attachment:

1. You can *view* the attachment. When you choose to view an attachment that is stored in the SOS database, a copy of the file is created in your computer's TEMP folder, the file properties are set to Read-Only, and the related application is launched to open it. For example, if you have stored a Microsoft Word "DOC" file in the database, after extraction, a copy of the document will appear in Word. When you close the document, SOS will erase the copy in the TEMP folder. The original copy in the database will not be changed in any way.
2. You can *edit* the attachment. This process is similar to viewing, except that the file is not set to Read-Only, and if you make any changes, the revised file will replace the original in the database.

\* The system Activity Log, if activated in the Administration Module, records the user ID, date, time, patient, and the name of the attachment opened.

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## Searching the Attachments List

Over time, you may accumulate a number of attachments for a given patient. Use the **Search Text** field to locate a particular attachment. To the right of the search field there are two options. You can choose to search for a match in the attachment description, key words, or Both.

