

# Chart Capture

Last Modified on 03/06/2023 4:01 pm EST

Version 14.8

**Path: Utilities Menu > System Admin > e-Correspondents (Keyboard Shortcut keys: [Alt][U][A][E])**

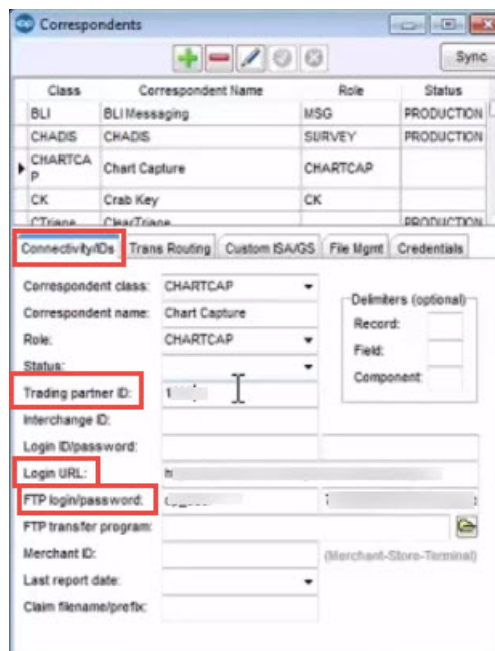
Chart Capture is a new integrated feature in version OP14.6.15. **Chart Capture** is an external service that practices may utilize to scan and archive legacy medical records.

For Chart Capture functionality to operate in Office Practicum, there will need to be an eCorrespondent table set up, named CHARTCAP, by a System Administrator or assistance from an Office Practicum representative.

The Correspondents table will launch when the path above is followed.

On the Connectivity tab, the following fields must be filled in:

- Trading Partner ID (Office Practicum assigned ID#)
- Login URL (Chart Capture assigned URL)
- FTP login/password (Chart Capture assigned)



The screenshot shows the 'Correspondents' window with a table and a configuration form. The table has columns for Class, Correspondent Name, Role, and Status. The 'Connectivity/IDs' tab is active, showing fields for Correspondent class, Correspondent name, Role, Status, Trading partner ID, Interchange ID, Login ID/password, Login URL, FTP login/password, FTP transfer program, Merchant ID, Last report date, and Claim filename/prefix. Red boxes highlight the 'Connectivity/IDs' tab, 'Trading partner ID', 'Login URL', and 'FTP login/password' fields.

| Class    | Correspondent Name | Role     | Status     |
|----------|--------------------|----------|------------|
| BLI      | BLI Messaging      | MSG      | PRODUCTION |
| CHADIS   | CHADIS             | SURVEY   | PRODUCTION |
| CHARTCAP | Chart Capture      | CHARTCAP |            |
| CK       | Crab Key           | CK       |            |
| CTrans   | ClearTrans         |          | PRODUCTION |

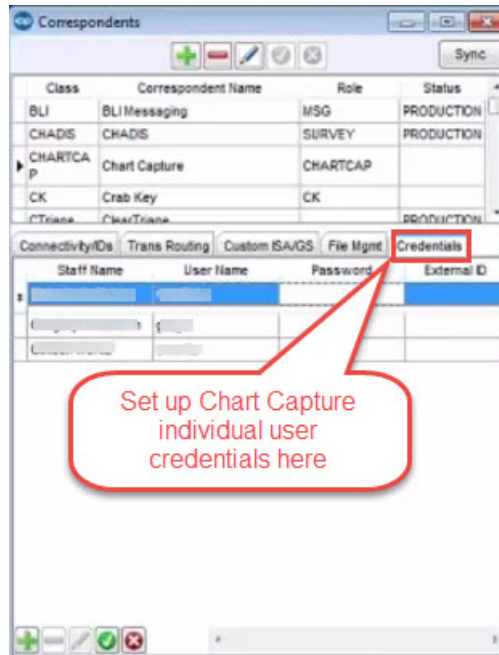
Connectivity/IDs | Trans Routing | Custom SAVGS | File Mgmt | Credentials

Correspondent class: CHARTCAP  
Correspondent name: Chart Capture  
Role: CHARTCAP  
Status:   
Trading partner ID: 1  
Interchange ID:   
Login ID/password:   
Login URL:   
FTP login/password:   
FTP transfer program:   
Merchant ID: (Merchant-Store-Terminal)  
Last report date:   
Claim filename/prefix:


This will identify individual OP clients to chart capture. We will be sending 3 key identifiers so that chart capture knows where requests are coming from:

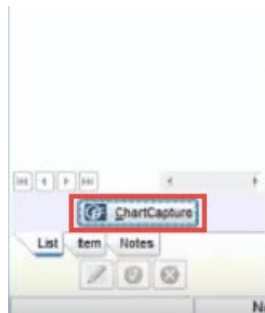
- EHR software
- OPMED ID
- User

On the Credentials Tab the Staff name and user name must be filled in for Chart Capture access to be available to user.



Users pay for the Chart Capture service via individual users. We will not show Chart capture accessibility to a logged in OP user, if they are not set up in the Correspondent table with assigned Chart Capture credentials.

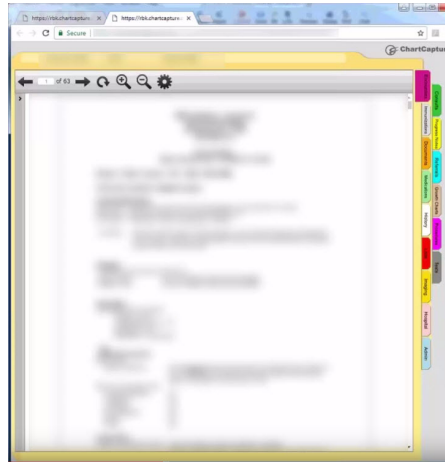
The rest of the magic happens here in the Review Scanned Items (see below)  . A new button will be available at the bottom left corner of the window, labeled Chart Capture.



As soon as credentialed user clicks on the Chart Capture button, this will call out to Chart Capture with the set up credentials from the e-Correspondent table.

- EHR software
- OPMED ID
- User

This is identifying who is requesting this information on behalf of particular patients. This will launch a browser window showing all scanned items from Chart Capture for a patient.



Once Chart Capture is setup Chart Capture will ask the administrator to export a demographic file containing: Patient Chart#, First Name, Last Name, DOB

1. Go to the menu bar at the top of the screen, and click **Reports > Demographic Analysis and Recall**.
2. The report will open to the Patient Demographics tab.
  - a. Select no date restriction.
  - b. Active patients only checkbox.
  - c. Go to Show/Hide Visible columns (lefthand side of the grid column headings). Uncheck all fields except Pat #, Patient, Birth Date.
  - d. Click Search.
  - e. Click Export XLS.
  - f. Navigate on the Save window to a local folder and save the file as a .csv file, then click "Save". Please ensure that you know where the file is saving.

Once the report has been saved, you'll be able to export it into Chart Capture. If you are having a data conversion it is best practice to wait until the final file has been uploaded or you have been given the green light.