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Product Bulletin: Practice Partner Zoom™

Practice Partner Zoom is a document management application that makes it easy to electronically file and store outside documents in Practice Partner Patient Records, Medical Billing, or Appointment Scheduler Version 8.1 or higher. Zoom is designed to help your office become completely paperless by enabling you to efficiently import scanned or faxed documents into the appropriate patient charts. With Version 9.1 or higher, you can also store patient photos, patient images, (e.g. insurance cards, driver's licenses), and EOBs.

What are the benefits of Zoom?

- Improves office efficiency by making it easy to index and store paper or faxed documents
- Ensures that outside documents are stored in the correct patient chart
- Saves time by quickly storing the scanned document in the appropriate section of the patient chart and placing the document in provider review bin(s)
- Also allows the easy loading of patient photos, patient images, and EOBs
- Eliminates the need to separately store and manage paper documents

What is the workflow for using Zoom?

Practice Partner Zoom is intended for use at a scanning station (a computer directly connected to a scanner). The staff member can use Zoom, which connects with the scanner's TWAIN interface, to scan the outside documents and save the resulting image files. He or she can then use Zoom to efficiently import the files into Patient Records.

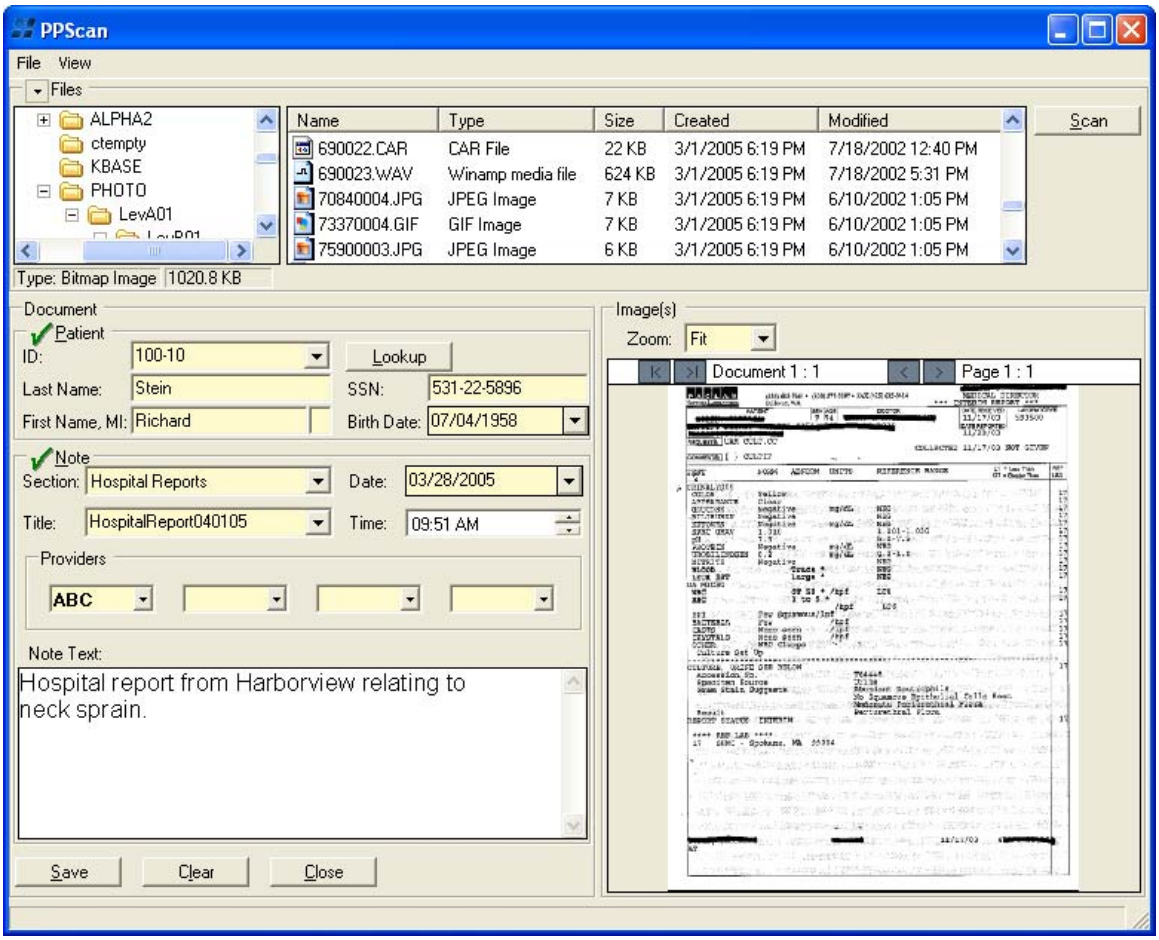
Here are the steps:

1. The staff member scans the paper documents and saves the resulting image files.
2. The staff member uses Practice Partner Zoom to view each scanned image, identify the correct patient, and attach pertinent information to the document.
3. The staff member should also designate the appropriate chart section in which to store the scanned image, send the file to a provider review bin, and enter any pertinent free-form text.
4. The staff member clicks "Save" and Zoom creates a note in Patient Records. This note contains a link to the image.
5. The clinician can access the note from their review bin, or find it in the designated section of the patient chart.

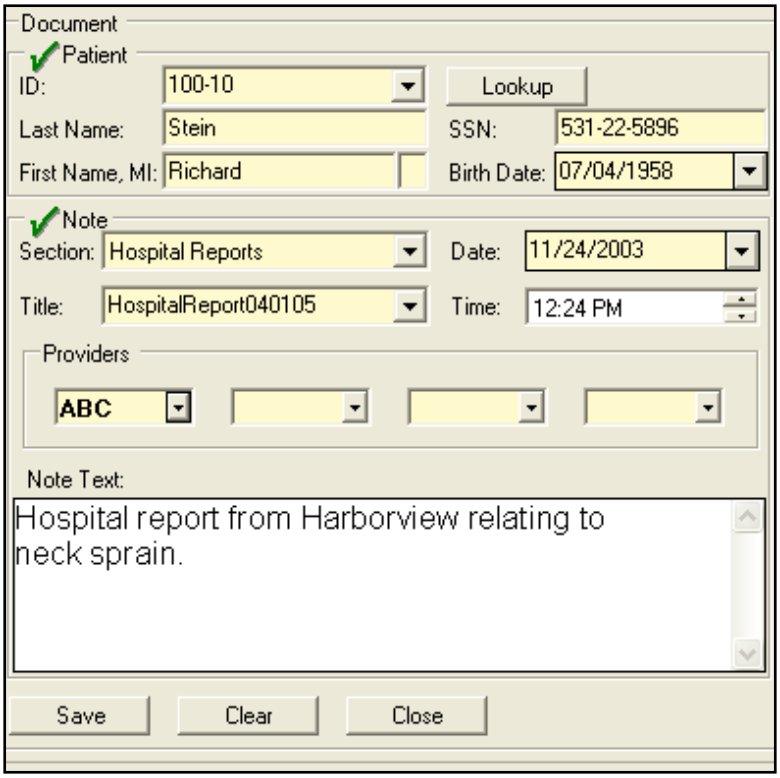
You can also use Zoom to load patient photos or other patient images. Additionally, Zoom will load EOBs which you can store with the appropriate carrier in Practice Partner Medical Billing.

How does Zoom work?

Zoom provides an easy-to-use central screen for managing scanned documents. From this processing screen, you can save scanned documents as images, view all images ready for import, select and view the desired image, attach the image to the appropriate patient chart, and import the image into Practice Partner. The central processing screen is shown below.



Practice Partner Zoom ensures that the scanned document is placed in the correct chart, in the correct chart section, and with all pertinent information attached. The document processing window below demonstrates how Zoom loads the document into Patient Records.

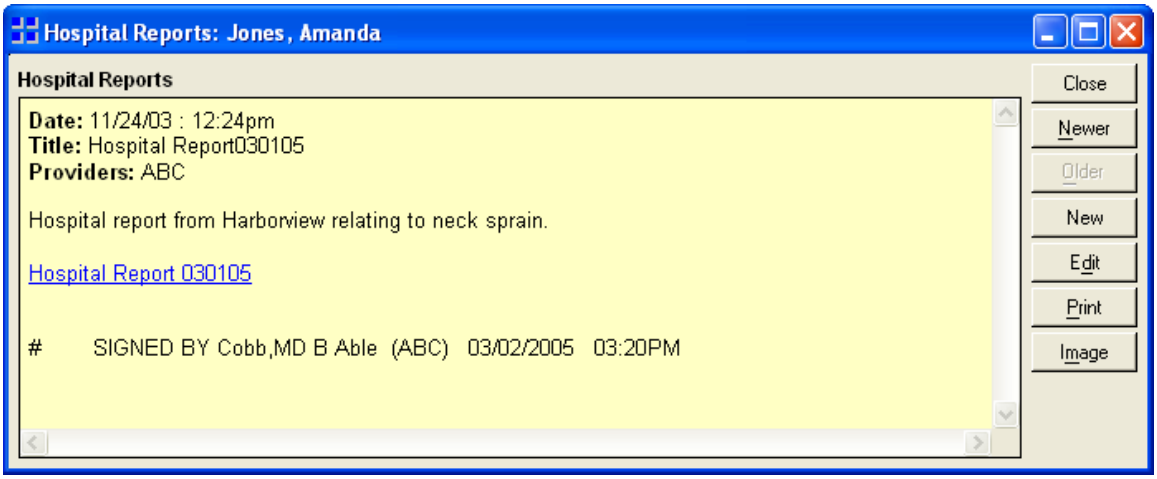


To find the correct patient chart, you can either enter the patient ID, name, SSN, or birth date. Zoom checks this information against the Practice Partner database and displays the patient information.

Once you have identified the patient, you can designate the appropriate section of the patient chart and add a title to the image. You can also enter pertinent free-form text relating to the image. To ensure that the right clinician sees the image, Zoom also allows you to send the image to provider review bins.

Click "Save", and Zoom will send the image and corresponding information into the patient chart. It's that easy.

Practice Partner Patient Records creates a note with a link to the image. The date, time, title, and other free-form text entered in Zoom are now available to the provider. The image below shows a sample note created by Zoom that has been reviewed and signed by a provider.



What file types does Zoom support?

Practice Partner Zoom will load files in the following image file formats: .bmp, .gif, .jpg, .tiff, and .pdf. Zoom will save images in a .pdf or .tiff format.

What are the requirements for using Zoom?

In order to use Practice Partner Zoom, your practice must be using Practice Partner Patient Records Version 8.1 or higher. Please refer to the Practice Partner System Requirements or consult your account manager for more information on current specifications.

Installing and configuring Zoom is very straightforward. Please note that the workstation running Zoom must meet the following minimum requirements:

- Windows 2000 or XP
- 512 MB RAM
- 1 GB free hard drive space

Your office will also need a TWAIN scanner (with accompanying drivers) that is connected to your office network.

What if I have additional questions about Zoom?

To learn more about Practice Partner Zoom, contact your account manager or Practice Partner at 206.441.2400.