amaze

SCAN AND SIGN REFERENCE GUIDE

From A to Z, improving operational efficiency to delivering optimal care to members

CM

AMAZE comes up with a new feature for our users to easily Scan, Fill and Sign any medical documents such as Prescription order, SNF Admit/Discharge, Polst/Advanced Directives and more .
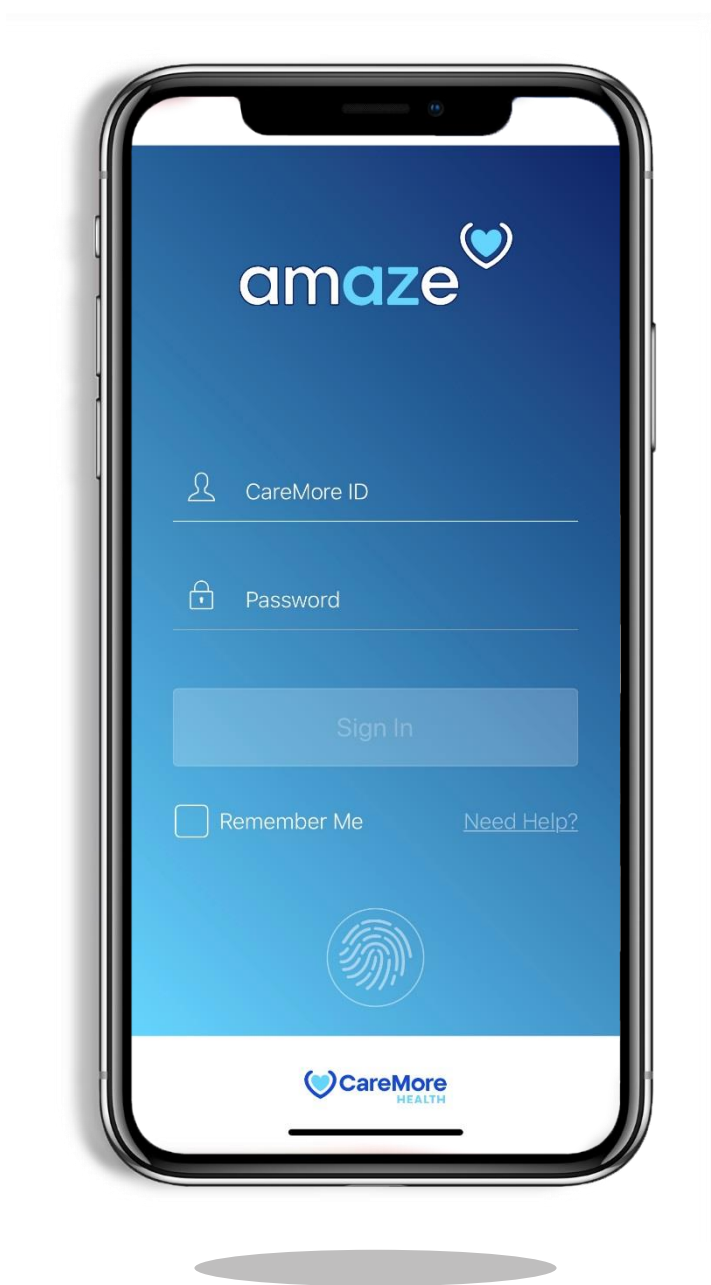
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Scan and Sign Documents

Users can scan, fill and sign any documents or images from the AMAZE Dashboard or from the member chart. Once the documents are filled and Signed, users can upload the modified documents to the FileNet System and then can be emailed to any Internal or External email IDs.

How to Access the Feature?

Sign in to the AMAZE Application using CareMore Credentials.

1) Once the user signs in to the application, the user can tap on **My Documents** in the Dashboard.

<p align="center">Or</p>

Open the member chart and tap on **'Fill or Scan Document'** option from the member chart.

2. The user gets navigated to the **Document Category** view where a list of document categories are displayed. The Categories are :

- BT Order Form
- Death certificate
- Dme/hh order
- Miscellaneous
- Polst/advanced directive
- Prescription order - Blank
- Prescription Order - Conversio Rx
- Snf Admit
- Snf Discharge
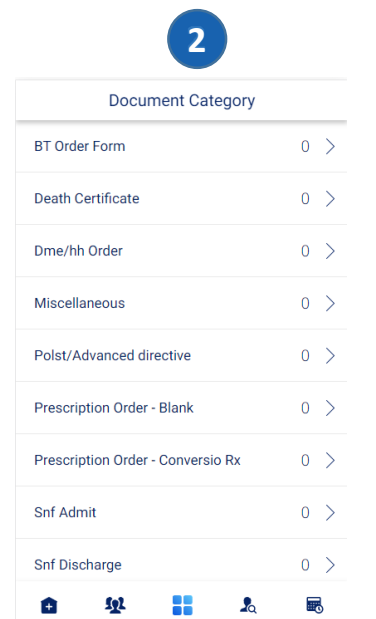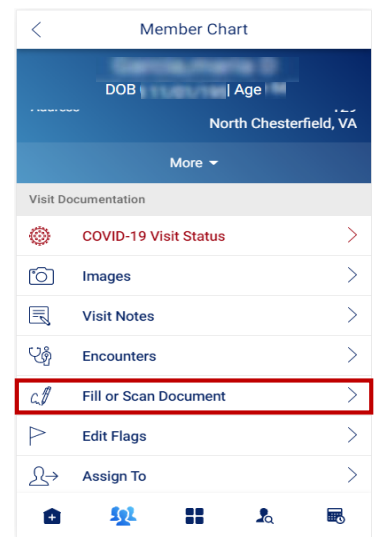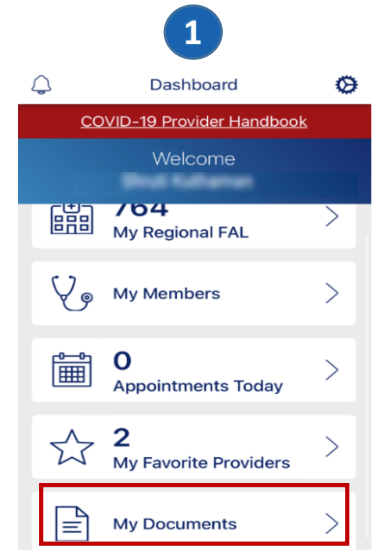
3. On tapping each document category, the document uploaded within that category displays. The selected document category appears as the header in the list view.

Tap on the + icon at the top right corner of the screen to add an image/document to the scan and Fill.
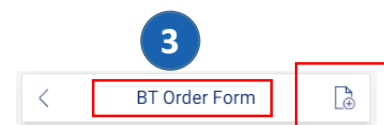

4. The documents can be added using below three options.
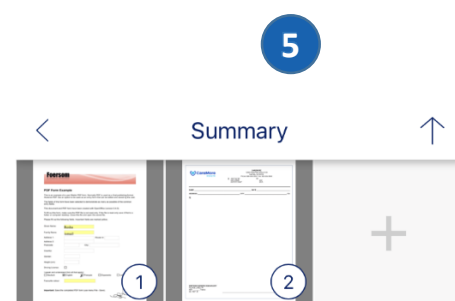
- **Photo Gallery**
- **Document**
- **Camera**

The user is navigated to the device's **Photo gallery** for choosing the image of a document from the gallery.

Any PDF documents available on your device can be accessed through the **Document** option.

The user can use the **Camera** option to take the picture of the document, crop it and use it for Fill and Sign in.
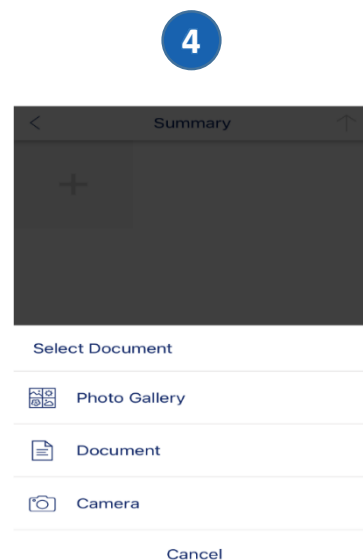
5. User can even select multiple pages or images by tapping the **+** icon in the Summary screen. Pages from the Summary screen can also be removed before or after edits by **long tapping** on any one of the pages. The message '**Do you want to delete the page?**' appears. On clicking Confirm, the page gets removed and the Summary screen auto arranges remaining pages. These image(s) or document(s) are uploaded as a **Single PDF** and each page is shown as a thumbnail in the **Summary** screen. Users can edit each of the individual pages in the Summary screen.

Note: At this point, the user cannot download the pdf to the phone file from their outlook. If the user wants to fill and Sign in a PDF from the email, they either have to take the PDF screenshot and access it from the photo gallery. Or download the PDF from their other email IDs to the phone than outlook and access it through the **'Document'** option.

Text Editor

AMAZE users can Fill the selected images using the **Text Editor** option.

1. Tap on the selected document page from the Summary View.

2. When the document gets open, tap on the **text box** from the bottom left of the page to **Fill** the document.

3. A Blank Text box opens up in the page. User can type the required details in this Text box and the typed texts get wrapped up to the next line.

4. Inserted texts can be dragged and dropped anywhere in the document. Once the typed texts are properly placed, tap anywhere outside the text box to **confirm** the text .

5. Users can increase or decrease the font size of the text and can also delete the typed texts by tapping the **Font** and **Delete** icons. See below.

6. Also the user can either do a long tap anywhere in the document area or tap on the 3 dots (...) in the above text option clipboard to add a **tick mark** or **checkmark** or **dot or bullet point**. See below.
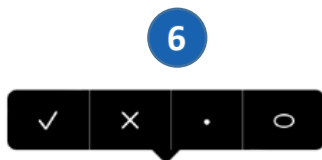
These unique icons can also be moved around and placed anywhere in the document.
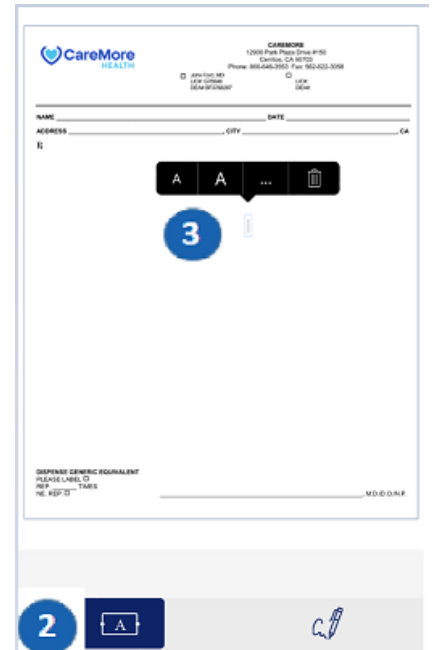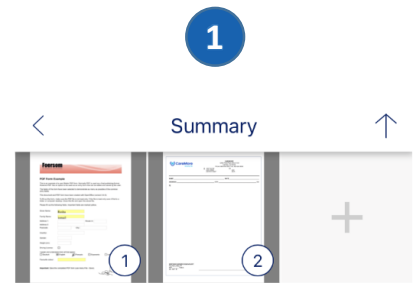
Signature field

1. The user can also sign in the document using the **Signature Icon** in the bottom right of the page.

2. The **Signature Pad** opens.

3. User can sign in the Signature pad using the finger. After entering the signature, the user can tap on **Use e-Signature** to confirm signature.

4. User can also clear and re-enter the signature by tapping on the **Clear** icon, if required.

5. Once the signature is confirmed and selected, the user is navigated to the document viewer. The selected signature will be available in the document.

6. The user can **hold**, **drag** and keep the signature anywhere in the document.

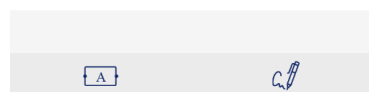7. The user can also **delete** the signature inserted by tapping on the delete icon. See below.
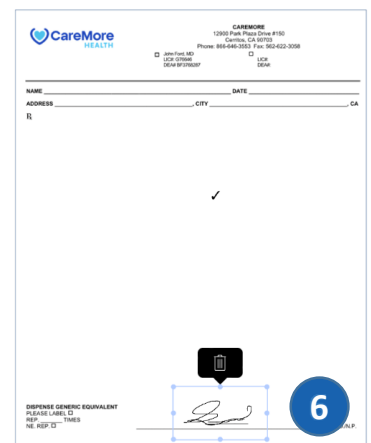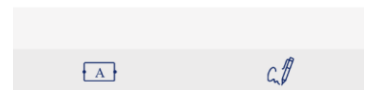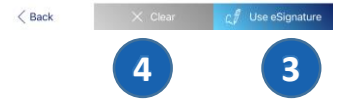

8. After making all the required changes in the document, tap on **Done** button at the top of the document page.

9. Edited document can also be unsaved by tapping the **Cancel** button

Save and Upload the document

1. After saving the required edits, tap on the **Upload** icon in the Summary page.

The updated document will be uploaded to FileNet as a single PDF.

2. Once the upload is done, the user will be navigated to the Document list view and the screen displays list of documents uploaded under the specific category. If a document is currently uploading, the message **Pending Upload** displays until it is fully uploaded to FileNet.

3. If all the documents are successfully uploaded, the message **Upload Successful** displays.

4. When the document upload status is successful, the user can **download** the document to the device memory or can send it in an **email** or can **rename** the document. On tapping 3 dots beside each uploaded document, options to download, email or rename displays on the screen.
For documents with pending upload status, the user cannot do any of the above action items.

5. On tapping Download option, the document will get downloaded to the **AMAZE folder** in the user's phone.
When the user taps on Email option, the Send Email view screen appears with options to add the recipient(s), subject line and email body.
On tapping rename option, the user can rename the document.

Notes: If the Document Upload to FileNet fails due to connectivity issues, AMAZE will continue to try uploading the document indefinitely in the background until the connection is established. Even if the session gets terminated, there will be no impact to the upload process.
The documents uploaded for a member can be viewed only through the member chart of that specific member.
Documents uploaded for a member by a user will not be available to view by a different user.
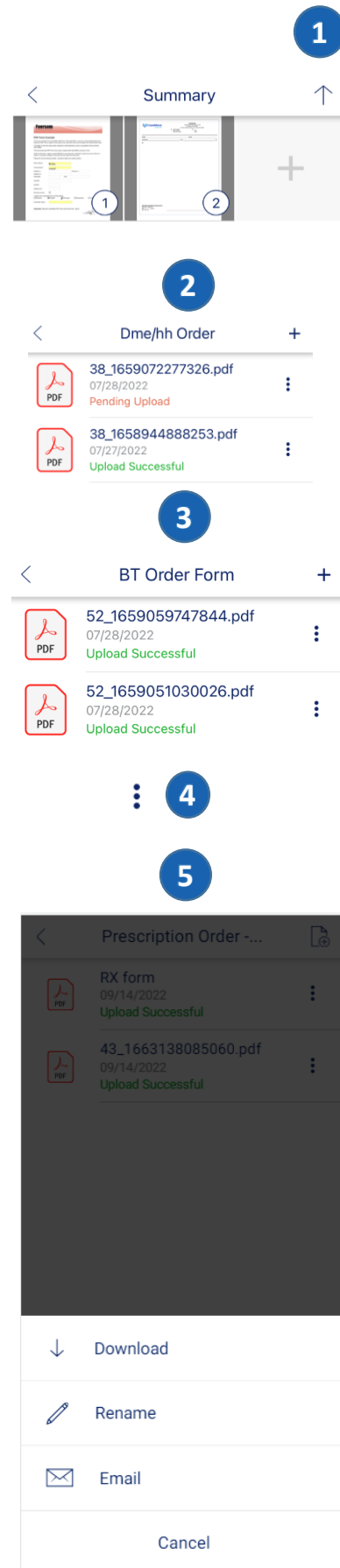
Emailing the document

1. When the user chooses to Email the filled/signed document, the Email page gets opened. In this page, the users can add one or more recipient email addresses.

The subject line can have a maximum of 100 characters and it is automatically updated as **AMAZE Scan & Sign Document** . The subject line can be edited if required.

By default, the email body displays the message **Please find the attached <document category> document.** For Miscellaneous category, the email body displays the message **Please find the attached document.**

2. Users can search for email address from Caremore/Anthem active directory. The recipient field provides autofill options so that when the user enters a minimum of 2 characters, search results appear. If the entry matches email addresses already used by profile, the same displays on top of the results. The search result is limited to 10 results.

3. Users can view options to **Submit** the email or to **Cancel** it. On clicking cancel, the user is navigated back to the document list view. If the email address of the sender is not found, the address will be CM-Amaze.

Users can also send email to a DL. This email ID will be displayed next time when you start typing.

4. When the email is successfully sent, the message **Email sent** displays.
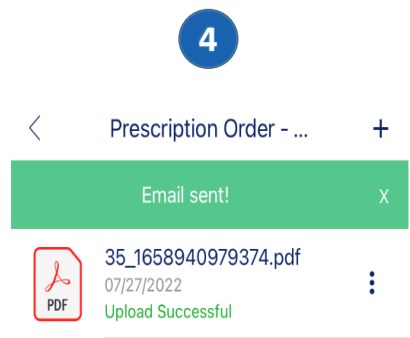
5. If the email is not sent due to lost connection, the message **Email not sent** displays. The user has to resend the document once the connection is established.
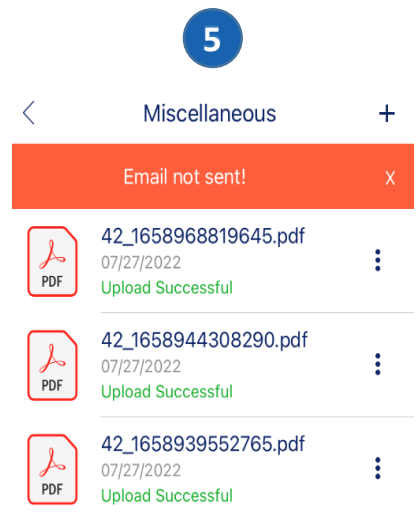
6. After successfully sending an email from the user's actual Caremore/Anthem email ID, the recipient will receive this email as a **SECURE email** in their inbox with the document attached to it. The recipient can open the PDF and verify the details.
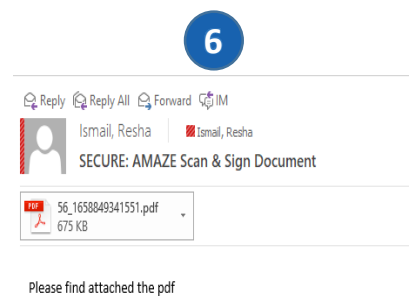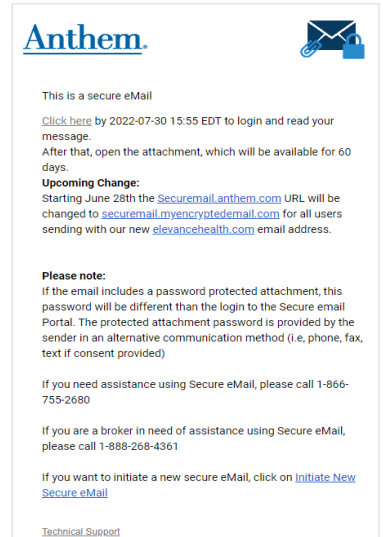
7. When the email is sent to an external recipient, the email gets delivered as secure email in their personal Ids.

8. The user has to perform a onetime user registration to open up the secure email. Later on, user can access the Secure email using this registered credentials.

9. Secure email delivered to the external IDs
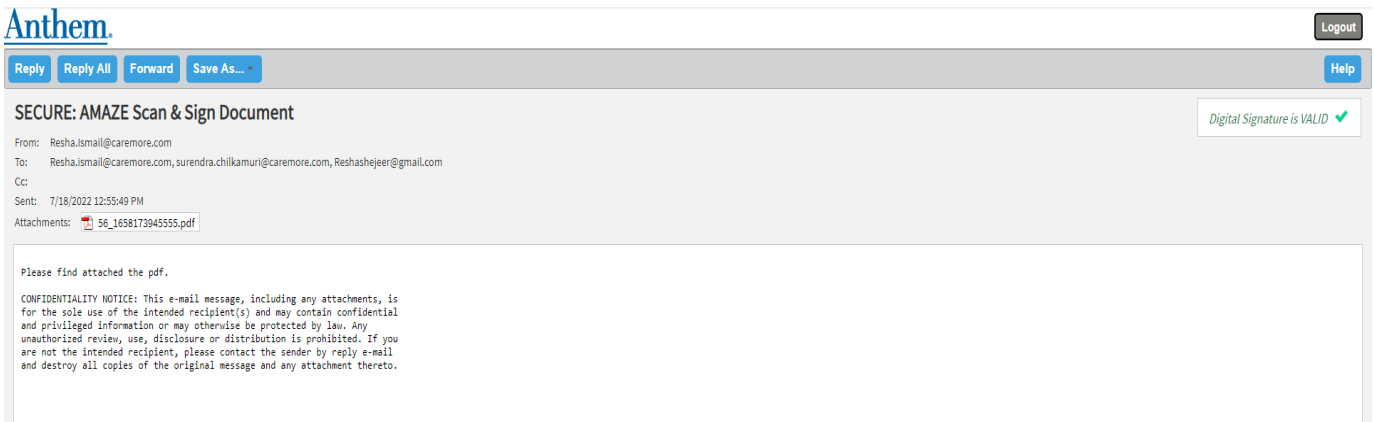
Renaming document

1. Once the document is uploaded successfully or is in Pending Upload status, users can rename it by tapping on the three dots beside it.

2. User can select **Rename** option from the options that display.

3. On selecting Rename option, the file name gets highlighted and the document can be renamed and saved. The app will use this new document name for downloading and emailing the document.

(1)

(2)

↓	Download
✎	Rename
✉	Email
	Cancel

(3)

< Prescription Order -...

RX form.pdf
09/14/2022
Upload Successful

43_1663138085060.pdf
09/14/2022
Upload Successful

(1)

< BT Order Form

53_1663140978632.pdf
09/14/2022
Upload Successful

53_1663139327772.pdf
09/14/2022
Upload Successful

53_1663138957073.pdf
09/14/2022
Upload Successful

bt rename.pdf
09/13/2022
Upload Successful
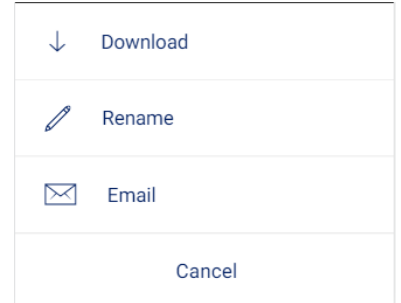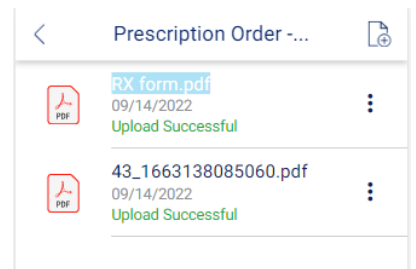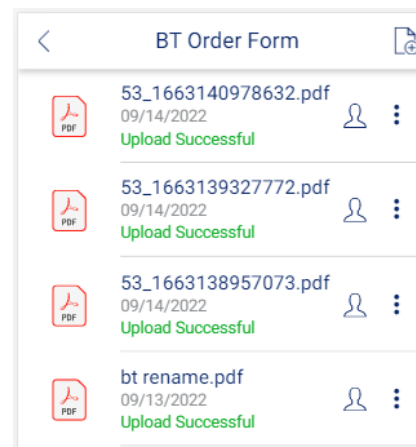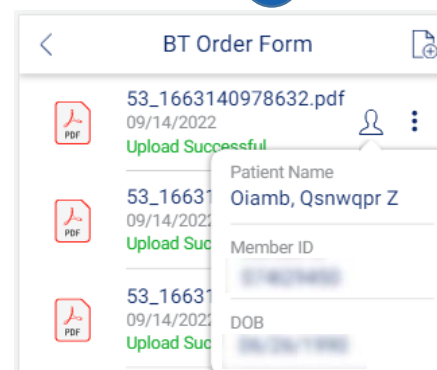
Member Identifier

1. Users can view member identifier in the document list view from My Documents in the dashboard.

2. On tapping the member icon beside each document, member details like Member name, Member ID, Member DOB will be displayed.

(2)

< BT Order Form

53_1663140978632.pdf
09/14/2022
Upload Successful

Patient Name
Oiamb, Qsnwqpr Z

Member ID

53_16631
09/14/202
Upload Suc

DOB

53_16631
09/14/202
Upload Suc

BT Order form

AMAZE users can submit BT Order form for any specific member through **Fill or Scan Document** option from the member chart of that member.

1. Tap on the Fill or Scan option from the member chart.

2. Users can select **BT Order Form** from the list of Document categories to navigate to the **BT Order Form** screen.

3. Tap on the **+** sign in the top right corner of BT Order form to select Fill Form option.

4. On tapping + sign, 4 options displays out of which Fill Form option must be chosen to navigate to the BT Order form page.
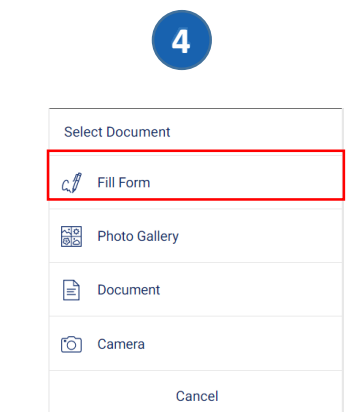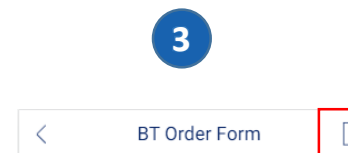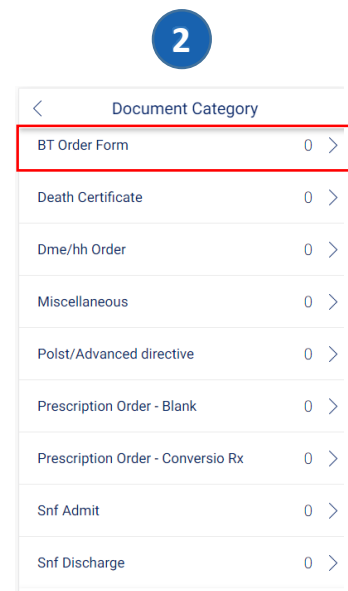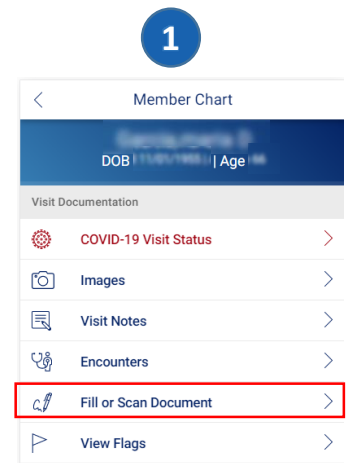
5. In the BT Form screen, the **Patient Name, DOB, Physician phone number** fields are prepopulated and editable. **Ordering Physician** field also gets pre-populated with the name of the logged in user. It can be edited if required.

On tapping **<** icon, the screen navigates to the document list view.

6. On tapping **Diagnosis / Indication for Transfusion,** the following mandatory fields get populated.

- **DX**- (Displays **Anemia** by default)
- **HGB**
- **HCT**
- **Platelets**

All the above fields can be edited and saved.

7. **Transfusion History** is optional and the user can select between options:

- **Within 3 months**
- **Prior to last 3 months**

After the above selection, the user can add **Date of last Transfusion. Previous Transfusion Reaction** can be selected with a Yes/No.

8. **Transfuse** is a mandatory option and the user can add the following fields:

- **Unit(s) of Red blood cells**
- **Unit(s) of Platelets**

After adding the following changes, the user can tap on **Save** to save the changes.

9. **Pre-Transfusion Medication** is an optional field and the user can select the following options:

- **Diphenhydramine** - On selection, user can select between the following:
    - **IV**
    - **PO**-If selected enter mg
- **Acetaminophen 65omg PO**
- **Other**-On selection, a text field to enter text opens

Tap on **Save** to save the changes

10. User can tap on **Physician comments** to enter comments which is an optional field. Tap on **Save** to save the changes.

11. On tapping **Risks and Benefits** which is a mandatory field, **Physician Discussed Risks and Benefits of Transfusion** screen opens and the user can select the option(s).

- **I have obtained Information consent from my patient for blood transfusion/blood products**
- **I have explained the nature of the procedure its risks, and expected benefits**
- **I have also discussed any alternatives to the procedure and their risks and benefits.**

12. Users can view allergies in the **Allergies** field. Allergies are pulled from NextGen.

When allergies are returned from NextGen, the user can view a list of allergies pre-populated in the Allergies tab.

13. If allergies are available, list of allergies can be viewed in the Allergies screen. Each of the allergies in the list view can be removed by tapping on **Edit**. To add more Allergies, user can tap on **Add Allergies.**

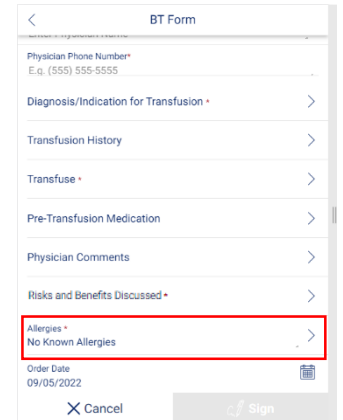14. By tapping on the red icon, existing allergies can be removed.
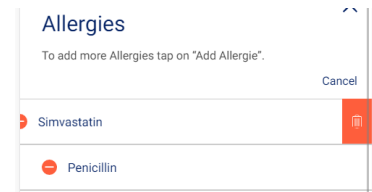
15. When no allergies are returned from NextGen, '**No Known Allergies'** is displayed in the Allergy field .

On tapping it, Allergies screen opens. User can also add allergies by deselecting the option and tapping on the **Add Allergies.**
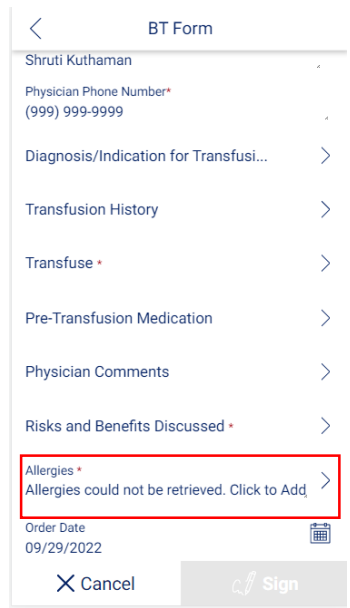

16. When allergies could not be retrieved from NextGen, the message '**Allergies could not be retrieved. Click to add'** displays on the screen. On tapping it, the user can either **Add Allergies** or select **No Known Allergies**.

17. When all the mandatory fields are filled, the **Sign** button is enabled.

18. On tapping the Sign button, the Signature pad opens. After signing, the user can **Submit** the form.
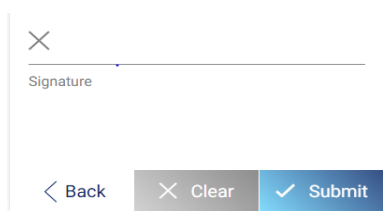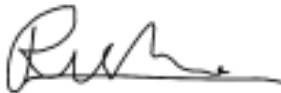
19. Sample pdf generated for BT Order form.

19

The Oncology Institute of Hope & Innovation

Transfusion Order Form	
Patient name: Qsnwqpr Oiamb	**Date of birth:** 06/26/1990
Ordering Physician: Resha **Physician Phone Number:** (845) 455-1515	**Allergies:** No Known Allergies
Diagnosis/Indication for transfusion: Dx: ___Anemia___ HGB: ___161___ HCT: ___88765___ Platelets: ___6778996557___	**Transfusion History:** ☐ Within 3 months ☑ Prior to last 3 months Date of last transfusion: 2022-09-12 Previous transfusion reactions: Yes
Transfuse: ☑ __2__ units(s) of Red Blood Cells ☑ __677828822__ units(s) of Platelets	**Pre-transfusion Medication:** ☐ Diphenhydramine ☐ IV ☐ PO ____ mg ☐ Acetaminophen 650mg PO ☐ Other ____
Physician Comment: Test	**Physician Discussed Risks and Benefits of Transfusion:** ☐ I have obtained informed consent from my patient for blood transfusion/blood products ☑ I have explained the nature of the procedure, its risk, and expected benefits ☐ I have also discussed any alternatives to the procedure and their risks and benefits
Order date: 2022-09-12T16:40:06.012Z	**Ordering Physician Signature:**

www.theoncologyinstitute.com

Prescription Order- Blank

AMAZE users can submit Prescription order- Blank for any specific member through **Fill or Scan Document** option from the member chart of that member.

1. Tap on the Fill or Scan option from the member chart.

2. Users can select **Prescription Order-Blank** from the list of Document categories to navigate to the Prescription Order-Blank.

3. Tap on the **+** sign in the top right corner of Prescription Order-Blank screen to select Fill Form option.

4. On tapping + sign, 4 options displays out of which Fill Form option must be chosen to navigate to the Prescription Order-Blank form page.
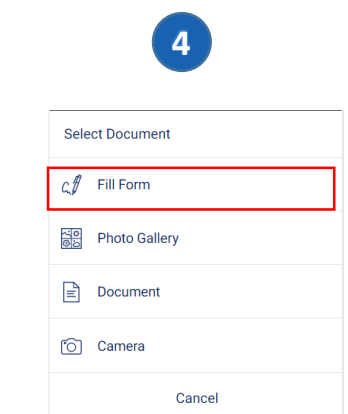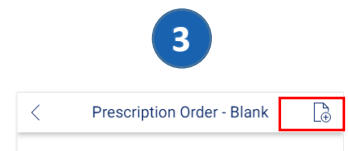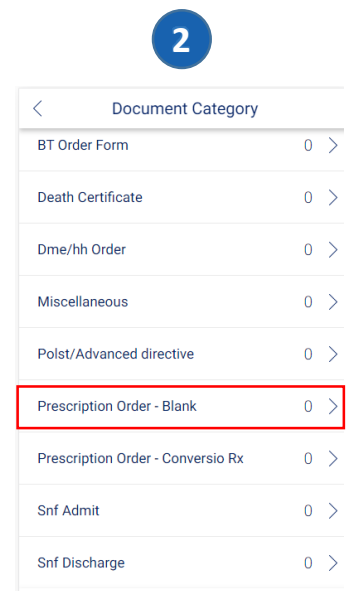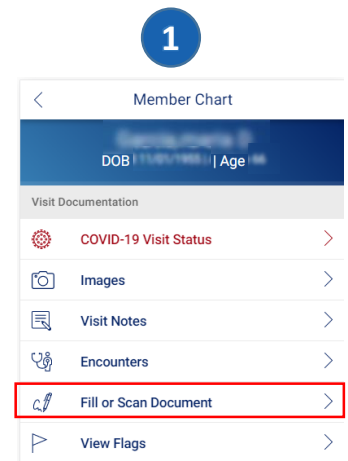
5. In the **RX Extended Form** screen, the **Name, DOB** and **Address** are prepopulated from the member chart.

AMAZE stores information like **Prescriber Address, Prescriber Phone, Prescriber Fax, LIC No, DEA No** to the user's profile once it is entered by the user. For any further RX form submission, all the above mentioned fields get prepopulated. Any changes to the above fields will override previous entry on the user's profile.

Prescription field is a free form text field. On tapping **<** , the screen navigates to the document list view

6. When all the mandatory fields are filled, the **Sign** button is enabled.

7. On tapping the Sign button, the Signature pad opens. After signing, the user can **Submit** the form.

Note: Users can view the **Prescriber phone** submitted in the RX form prepopulated in the **Physician Phone number** field of BT Order form. Any changes to this field will override previous entry on the form.

8. Sample pdf generated for Prescription Order-Blank.

CareMore HEALTH

null
Lic #lic no   DEA#123456
prescriber address
Phone:(555) 555-6666   Fax:(555) 555-5555

Name: Ebntdly, Wohwpe S

Date: 10/28/1939

Address: COAST JAY STNORTH LAS VEGAS, NV
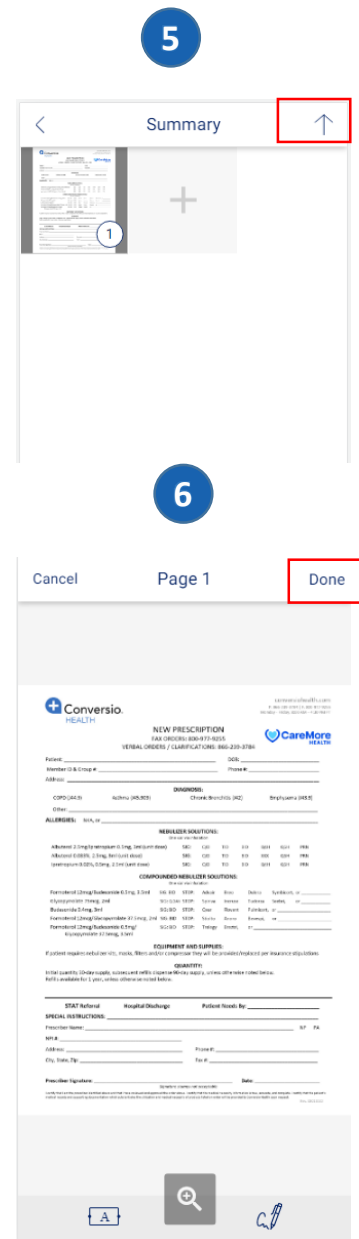
Rx

test

Signature

Prescription Order- Conversio RX

AMAZE users can submit Prescription order- Conversio RX for any specific member through **Fill or Scan Document** option from the member chart of that member.

1. Tap on the Fill or Scan option from the member chart.

2. Users can select **Prescription Order-Conversio RX** from the list of Document categories to navigate to the Prescription Order- Conversio RX

3. Tap on the **+** sign in the top right corner of Prescription Order-Conversio RX screen to select Fill Form option.

4. On tapping + sign, 4 options displays out of which Default Templates option must be chosen to navigate to the Prescription Order-Conversio RX form page.
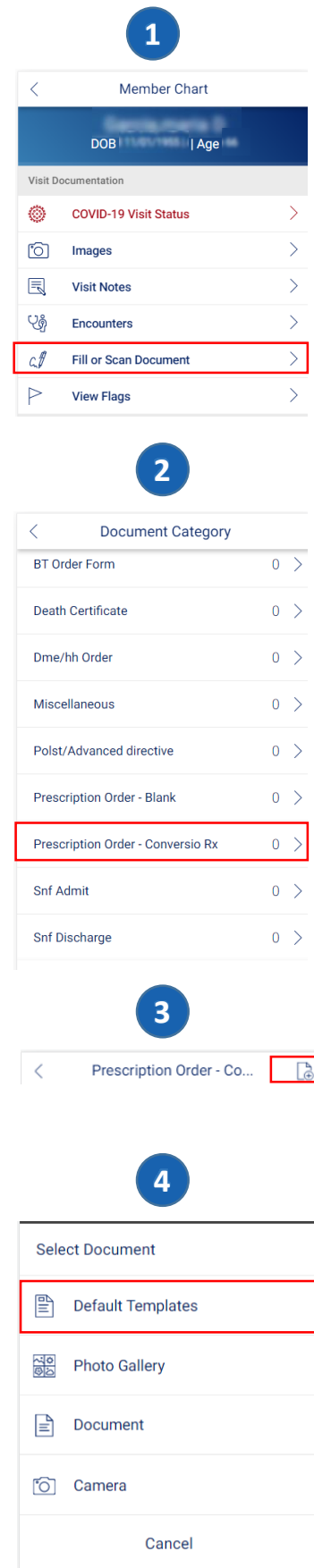
5. On tapping the **Default Templates**, the user will be taken to **Summary** page with Conversio-RX document pre-loaded.

6. When you tap on the pre-loaded Conversio-RX document, it can be edited using Text editor. Tap on **Done** to save the changes. The screen navigates to the Summary screen. Tap on **Upload** icon in the Summary Screen to Upload the document.

7. Sample Conversio-RX document.

7

Thank you for using AMAZE Scan and Sign reference guide. We will have more exciting features for you in future. Please reach out to us at amazecoreteam@caremore.com to provide your feedback or if you are facing any issues.

CareMore
HEALTH