

Planetrehab Version 2.100 Release Note

Includes New Scanning Feature

On March 20th, we released a major upgrade to the Planetrehab software. Included in that upgrade is the ability to easily scan and save documents and easily find and review those scanned documents.

The scanning program will work with any TWAIN compliant scanner (most commercially sold scanners are TWAIN compliant), including most all-in-one desktop printer/copier/scanner combos.

Documents that are scanned in Planetrehab are **not** saved in your database, but in on a compute that you designate as your Documents Storage Server. Therefore, scanned documents are **not** included in your data that is synched. **You are completely responsible for backing up your scanned documents**, which are conveniently housed in a directory of your choosing. The directory cannot be located on the Planetrehab computer, but should be located on another computer on your network.

If you plan on using the scanning feature, we cannot reiterate enough that you should regularly backup the scanned documents folder either using installed backup software or an online option (we use Jungle Disk for our personal computers - <https://www.jungledisk.com>).

Planetrehab will know how to link to your scanned documents in case you have to move the scanned document directory, so you don't have to worry about losing the links if you have to replace the computer that contains the scanned documents.

The Planetrehab server has the latest version that includes the scanning feature. However, to be able to use the scanning feature on your workstations, you must reinstall Planetrehab on each workstation.

Reinstalling Planetrehab on a workstation is very easy. Here are the step by step instructions on how to do the reinstall.

PLANETREHAB WORKSTATION SET UP INSTRUCTIONS

Instructions for setting up workstations on your network for access to Planetrehab. The Planetrehab server is set up using "workgroup" as it's peer-to-peer workgroup setting.

Notice: Laptop or Notebook setup requires that you never let the laptop go into "Standby" mode. When it does, SQLserver notices that the laptop is no longer on the network and closes the connection. When it "Wakes Up" you are no longer connected to Planetrehab.

1. Make sure the Planetrehab server is running and connected to your network.
2. Make sure your workstation is set to use "**workgroup**" as it's normal workgroup. You can change the setting by right clicking on "**My Computer**" and clicking "**properties**" then go to the tab "**Computer Name**" on WinXP and "**Network Identification**" on Win2k. You can change the workgroup here.
3. Open your **Windows Explorer** (not Internet Explorer) on your computer and navigate to "**My Network Places**", click on the (+) plus sign and then on the plus at "**Microsoft Windows Network**" and then the plus on "**Workgroup**". You should see the name of the Planetrehab server in the list. Depending on the operating system, you should see either the name or the description of the server "**pr...**" or "**Planetrehab Clinic Server**".
4. Navigate to the server and open the folder "**Planetrehab**". In that folder you will find a program named "**Workstationsetup9sp2.exe**". Double click on this program and the workstation environment will be

installed on your computer. You must be using an account that has “Administrator” privileges on the workstation at the time.

5. The workstation install will place a Planetrehab **Icon** on your desktop, double click on the icon to start the Planetrehab clinic program.
6. **The first time you run the program it will need to know where the Planetrehab directory on the server is on your network. When you start Planetrehab for the first time, it will open a “Search Window”. In the search window, go to the bottom of the window to “...Network...” (it will be different in different versions of Windows” and navigate to “Workgroups/PR...(server name)\planetrehab” the “Planetrehab” directory on the server and then click ok. Planetrehab clinic will then be able to connect to the server.**
7. **If the above doesn’t work**, navigate to the server in Windows Explorer and find the file “prclinic.ini” in the “Planetrehab” share and copy it to the c:\program files(or c:\users on Vista or Win7 **Computers**)\planetrehab\ directory on your workstation. It is set up to work with your server. (Windows Explorer can be accessed by right clicking on “My Computer” and choosing “Explore”)

If you still cannot see the Planetrehab server using the above method, for instance your computer in a member of a domain, enter the following string in your Windows Explorer address field.

“[\\<name of your server>\planetrehab](#)” then hit enter and you should be transferred to the proper share. You may also enter the above string in the Start/Run command line to find the server.

If you still cannot find the server, either the Planetrehab server cannot see your network or the Planetrehab server received an incorrect IP address from your DHCP server. (you do have one) If so, you will have to contact a network knowledgeable person to make sure that the server can see the network.

Getting Ready to Use the Scanning Feature

To set the location where you want to store all scanned documents, click on *View>Clinic Setup*. Note the placeholder for the location at the bottom labeled *Scanned Documents Location* (**Figure 1**). You can type in the location or click on the ellipsis to chose the location (the button with the three periods all the way to the right). The Find Directory dialogue box will open and you can navigate to the computer you want to save the scanned documents to. Notice there is a button in the bottom left hand corner that allows you to create a new directory called Create New Folder. Once you have determined the computer and/or directory you want to save the scanned documents to, you can create a new directory to house your scanned documents. Simply click on the Create New Folder Button and a new directory (folder) will be created and you can name it (planetrehab_scans is a good name).

Figure 1 – Clinic Setup – This is where you setup the location where you will store your scanned documents.

Scanned documents can be placed in either the patient file or the patient profile. It is a good idea to scan documents that are unique to a patient’s profile in the patient profile database. For example, a prescription card would be specific to the profile, but their driver’s license would be specific to their patient file. Other examples of documents that

should be attached to the patient profile is their prescription and a doctor's note.

Scanning a Document

When you want to scan a document, go to the patient's file or the patient's profile. To scan a document or review a previously scanned document in the patient file, find the patient and then click on the *Documents Tab* (lower right hand side – see **Figure 2**). When in the patient profile, click on the *Documents Tab* (upper middle next to the Dates/Misc. Tab – see **Figure 3**).

To scan a document, click the *New Button*



and the *Scan Document Dialogue Box* appears. You will be able to choose your scanner by clicking on the drop down arrow (if you have more than one scanner). If you plan on scanning multiple documents at once, make sure to check off *Enable Document Feeder*. In the *Document Description Field*, you can create your own description or click the down arrow and choose one of the pre-determined descriptions.

To start the scan, click on the *Scanner Icon* (to

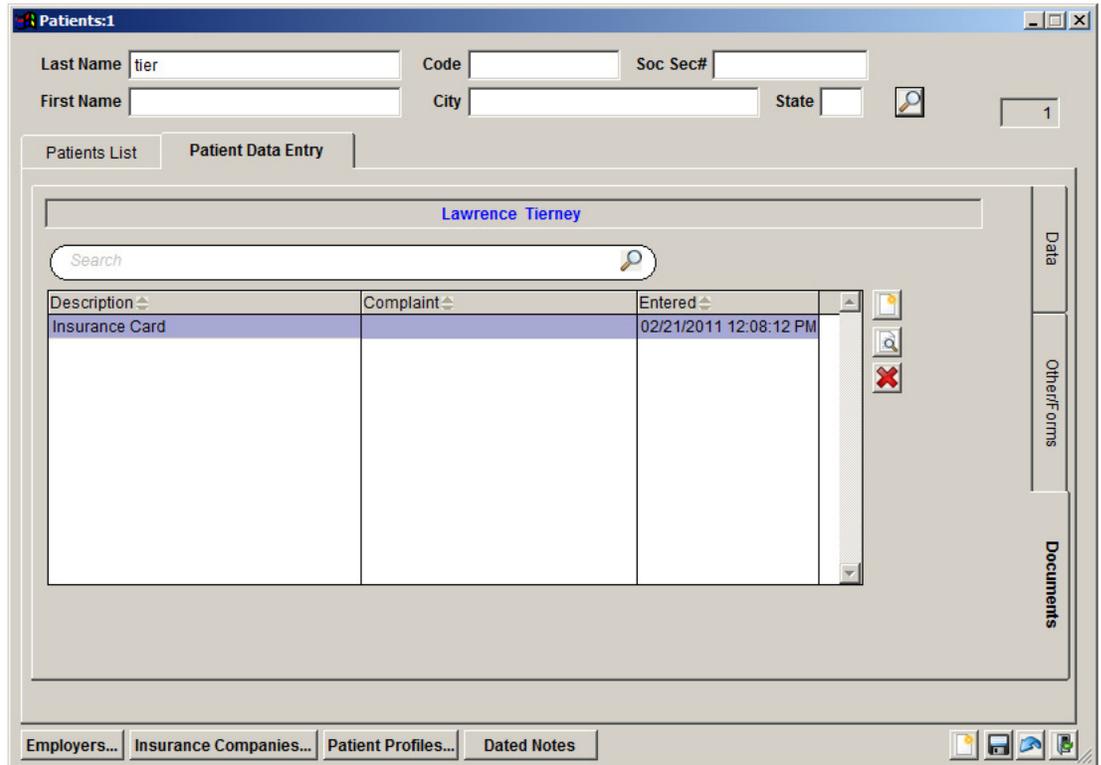


Figure 2 – Patient File Scanned Documents Dialogue Box – If you want to scan a document (i.e. driver's license), and attach it to the patient file, make sure you are on this screen when initiating the scan.

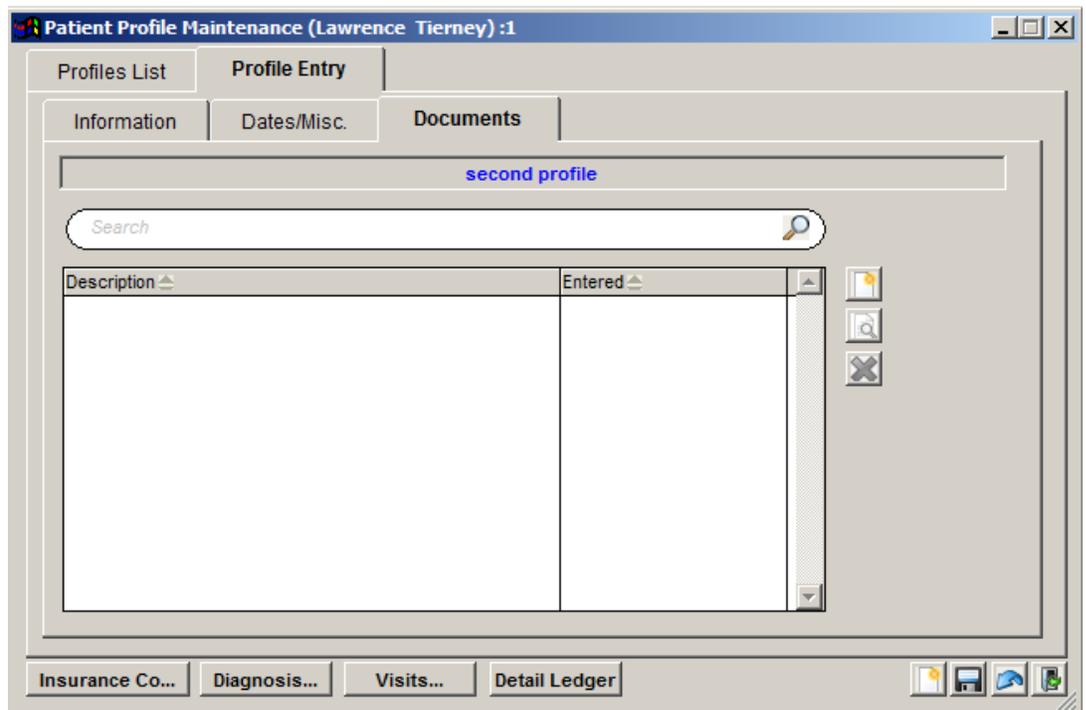


Figure 3 - Patient Profile Scanned Documents Dialogue Box – If you want to scan a document and attach it to the patient profile (i.e. prescription), make sure you are on this screen when initiating the scan.

the left right underneath the *Document Description*) and the process will start. Once scanning is finished, the result will show up in the main window of the *Scan Document Dialogue Box*. You can jump to a particular page, zoom in or out, rotate right or left, save or close the *Scan*

Document Dialogue Box. Once you have saved the scanned document, it will appear in this list (see **Figure 2**). You can view your saved scanned document by clicking on the description and then click on the *View Button* (the button to the right with the magnifying glass). You can also delete a saved scanned document by highlighting the document and then click the *X Button* (Red X Button to the right). If you delete the document, it is permanently deleted.

You can search for a scanned document by entering your search term in the *Search Bar* (labeled *Search*). Place your cursor in the *Search Bar* and start typing. Planetrehab will automatically display all documents with the description you type.

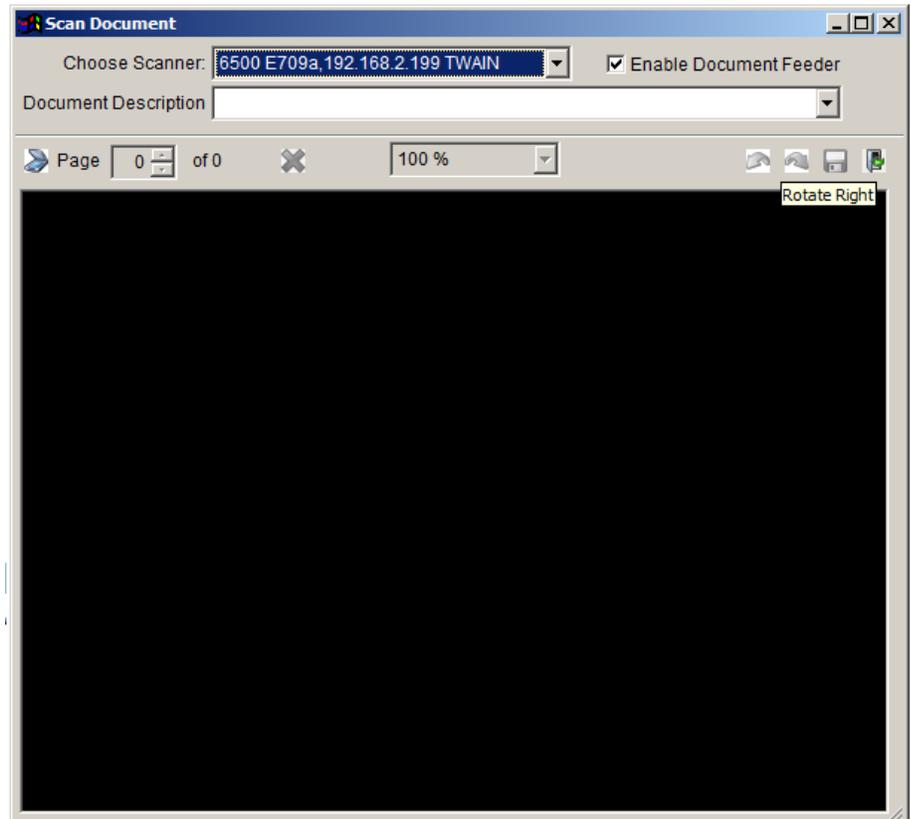


Figure 4 – Scan Document Dialogue Box – This is where you start when you want to scan a document.

New Icons

Notice all icons have been updated to comply with the Windows 7 OS theme. The icons are easier to understand and graphically superior.

Renamed and Moved Appointment Book

Under the View Menu, we renamed the *New Appointment Book* menu option to *Appointment Book* and moved it to the top spot in the list. We moved the *Legacy Appointment Book* menu option to the second spot in the list. Ultimately, we will create a new section for any legacy menu options and place all legacy menu options there.