1. From the Scan toolbar, click the Batch button. The Batch Scan page displays

- The Batch Basket workflow is the preferred method when scanning single document types for multiple patients, such as New Registration Forms.
- Similar documents may be placed in a pile upon receipt and scanned in as a Batch Basket by anyone at the end of the day. Once all documents are scanned, they must be sorted to the appropriate patient chart.
- Recommended batch size is less than 50 pages.

2. Click on Scan on the toolbar to the Batch Scan Documents page, enter a name for the batch. Batch names should be intuitive to the document type. The Default Document Name and Default Document Date are default values for each image in the scan and may be changed while sorting to a patient's Chart Group folder.

When naming the batch, include the clinic name, type of batch and your initials.
• If applicable, set **The Access Group** to limit access to this batch to specific groups of users such as only Billing staff.

3. Click the **Scan** button to begin scanning the batch. The batch scan values display in the **Batch Basket**.

4. Click the **Sort to Chart** button to sort the images to patient charts. The first image displays in the **TouchWorks Scan: Sort Documents to File Charts** page.

5. Type the Patient name in the **Patient Field** and select **Search**

6. Highlight the appropriate patient from the search results
7. Select the Folder to be filed into by clicking the icon, and selecting the appropriate folder.
8. Enter the date of the document in the Date field.
9. Continue the same process for the remaining documents in the batch.
10. When finished sorting a batch, select the next batch to sort from the **TouchWorks Scan: Select Batch** pop-up window.

![TouchWorks Scan: Select Batch](image)

All pages in this batch have been sorted. You may sort another batch or press close to continue.

<table>
<thead>
<tr>
<th>Batch Name</th>
<th>Acquire Date</th>
<th>Default Document</th>
<th>Default Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc</td>
<td>05/28/2010</td>
<td>Misc</td>
<td>05/28/2010</td>
</tr>
<tr>
<td>rx med</td>
<td>05/28/2010</td>
<td>rx med</td>
<td>05/28/2010</td>
</tr>
<tr>
<td>nurses notes</td>
<td>05/28/2010</td>
<td>nurses notes</td>
<td>05/28/2010</td>
</tr>
<tr>
<td>med orders</td>
<td>05/28/2010</td>
<td>med orders</td>
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<td>05/28/2010</td>
</tr>
<tr>
<td>refuse treatment</td>
<td>05/28/2010</td>
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<td>05/28/2010</td>
</tr>
<tr>
<td>ekg-holter</td>
<td>05/28/2010</td>
<td>ekg-holter</td>
<td>05/28/2010</td>
</tr>
</tbody>
</table>

11. When finished sorting all batches, close the **TouchWorks Scan: Sort Documents to Charts** page. The **Batch Basket** page displays.
Deleting a Batch Job in the Basket

1. Click **Batch** to access the basket.
2. Highlight the batch to be deleted.
3. Click the **Delete** button.
   - The batch is deleted and, if necessary, all images would need to be re-scanned.