



***ROI Director***  
***Quick Start Guide***  
**Platform Services Version**

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**Big Sky Systems, Inc. 2021**

**Big Sky Systems, Inc.**  
**PO Box 4401**  
**Bozeman, MT 59772**  
**406-223-5463**  
**tom@bigskysystems.biz**

***ROI Director***  
**Program updated by Brandon Strong**  
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## **ROI Director**

### **Quick Start Guide**

#### **Preface**

This manual describes basic information to use the ROI Director module.

#### **What is ROI Director?**

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. ROI Director assists in releasing encrypted medical records to patients and recording release requests. Release request information including patient contact information, patient signature, and release authorization is collected and saved as a PDF in DocuWare every time a patient's records are exported. Patient records are retrieved from DocuWare using the patient number, encrypted using a password defined by the patient, and stored to a thumb drive for the patient to take home. Instructions and tools for decrypting medical records are also stored on the thumb drive.

#### **Licensing**

You must have a valid license file for the module that you are installing ([Contact us to find out how to obtain a license](#)). This license should be placed in a **License** folder that you've created in the DocuWare directory or under the C:\ root drive on the local machine. If you receive a license file with a .zip extension, place the .zip in the license folder and double click to extract the license file.

#### **Installation**

Download the ROI Director from the StapleWare website at [www.stapleware.com](http://www.stapleware.com). Open the **ROI\_Director.zip** or ROI\_Director.zip setup utility. Double-click the **SetupROIDirector\_v.x.msi** and run the program from its current location. The install wizard will lead you through the setup process.

**Note:** If you're running this software and this installation is an upgrade - Please close the program, exit the services (*if applicable*), and uninstall the program before running this upgrade.

## ***Installation - Licensing***

If you are starting the ROI Director for the first time the following message will appear when ROI Director is started.



Click the ellipses and select the correct license file from Windows Explorer.

## Getting Started with ROI Director

The ROI Director will export documents out of a DocuWare file cabinet based on search criteria. In the following screen shots all of the documents that have the MRN '333' have been encrypted and exported to a thumb drive.

DocuWare dwadmin  
J & H Office Equipment, Inc.

Document trays Search Tasks

Medical Records - Default Search Dialog

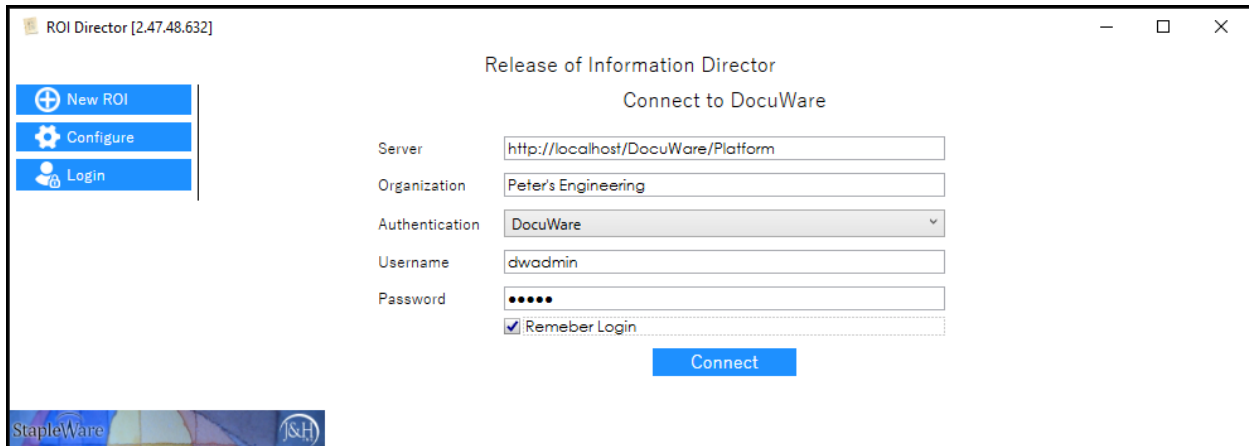
Type	Document Type	Patient Name	MRN	DOB	Visit Date	Visit #
PDF	Doc2	Kristy McFlaringer	444	04/04/20...	08/10/2019	081019
PDF	Doc3	Kristy McFlaringer	444	04/04/20...	08/10/2019	081019
PDF	Doc1	John Wallace	333	03/03/20...	08/08/2019	080819
PDF	Doc2	John Wallace	333	03/03/20...	08/08/2019	080819
PDF	Doc3	John Wallace	333	03/03/20...	08/08/2019	080819
PDF	Doc1	John Wallace	333	03/03/20...	08/09/2019	080919
PDF	Doc2	John Wallace	333	03/03/20...	08/09/2019	080919
PDF	Doc5	Dillon Pyke	222	02/02/20...	08/07/2019	080719_2
PDF	Doc4	Dillon Pyke	222	02/02/20...	08/07/2019	080719_2

Name	Date modified	Type	Size
201567 - Copy - Copy-[0].roi	2/25/2020 3:53 PM	ROI File	160 KB
201572 - Copy - Copy-[0].roi	2/25/2020 3:53 PM	ROI File	160 KB
201572-[0].roi	2/25/2020 3:53 PM	ROI File	160 KB
201573 - Copy - Copy-[0].roi	2/25/2020 3:53 PM	ROI File	160 KB
201573 - Copy-[0].roi	2/25/2020 3:53 PM	ROI File	160 KB
Instructions.pdf	2/18/2020 11:50 AM	Adobe Acrobat D...	220 KB
ROIAuthorization.pdf	2/25/2020 3:53 PM	Adobe Acrobat D...	88 KB
Run ROI Decryptor.exe	2/18/2020 11:50 AM	Application	225 KB

## Starting ROI Director

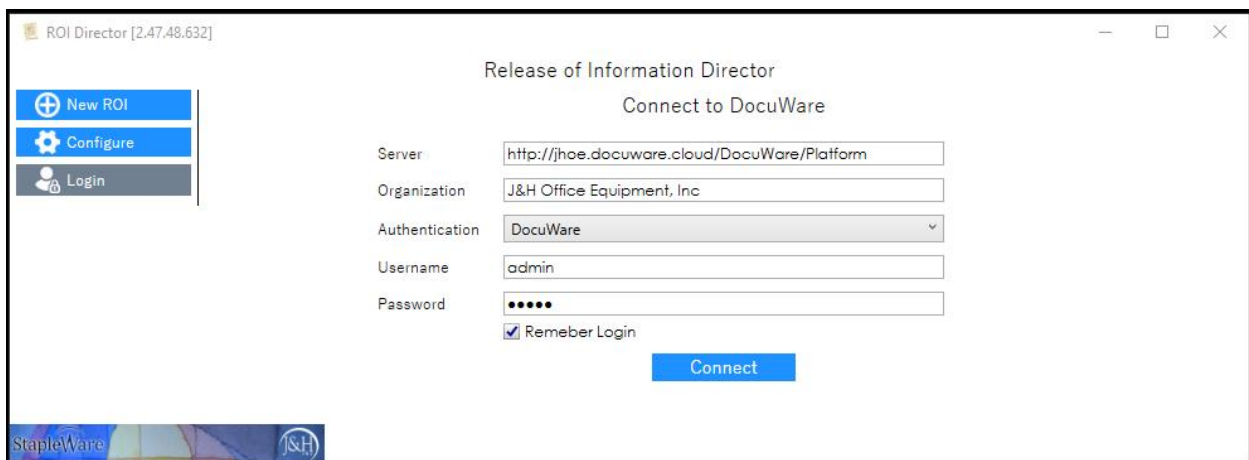
Below is an example of the parameters of the ROI Director program.

When the ROI Director starts you will be presented with a screen to log into DocuWare. Enter a valid DocuWare server URL, organization, and DocuWare login credentials, then click 'Connect'.



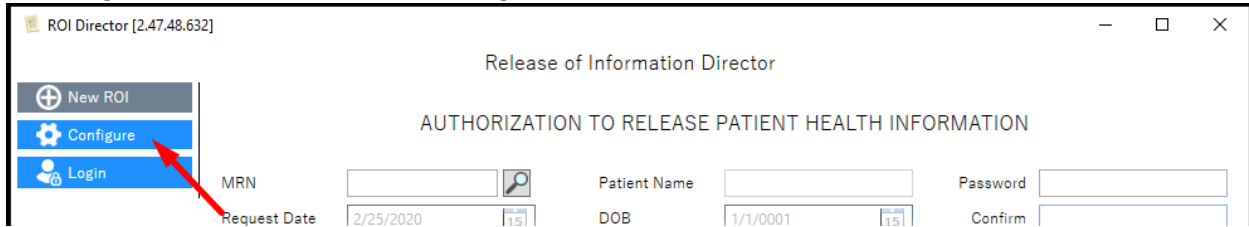
## Connecting to DocuWare Cloud

ROI Director works with DocuWare Cloud. Enter the DocuWare Cloud server URL, Organization, and DocuWare Cloud login credentials, then click 'Connect'. These credentials are the same as the credentials for the DocuWare Cloud Web Client.



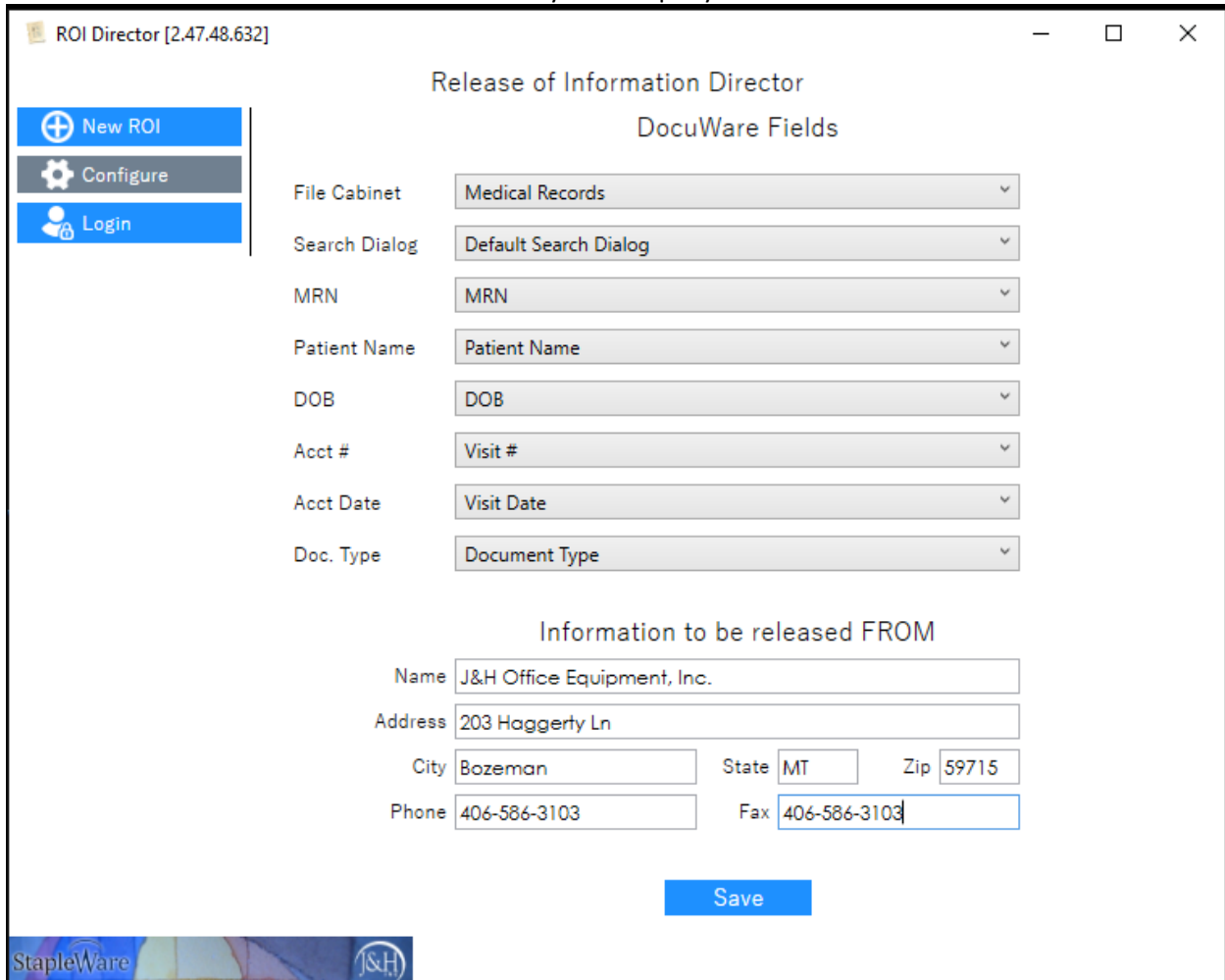
## ROI Director Configuration

To configure ROI Director, click the 'Configure' menu item.



Configure all of the settings on this page:

- **File Cabinet** – Choose the file cabinet to export medical records from
- **Search Dialog** – Choose the search dialog for searching for medical records
- **MRN, Patient Name, DOB, Acct #, Acct Date, Doc. Type** – Pick the corresponding file cabinet fields
- **Information to be released FROM** – Fill in your company's contact information



Click 'Save' to save the configuration

## Releasing Information

Perform the following actions to release encrypted medical records from the file cabinet

### Search for and Select Documents

1. Type a patient number in the MRN box and click the magnifying glass to search for the MRN. The Patient Name, Request Date, and DOB will auto-populate.
2. Select a beginning date. This is defaulted to the first document date found for this MRN.
3. Select an end date. This is defaulted to the last document date found for this MRN
4. Select accounts to export
5. Select document types to export
6. Click 'Select Accounts' to open the account selection dialog
7. Check the boxes next to the accounts to export them and click 'OK' to save the selections

Release of Information Director

AUTHORIZATION TO RELEASE PATIENT HEALTH INFORMATION

MRN 1.  Patient Name

Request Date  DOB

Beginning 2.  Thru 3.

Accounts 4.

Doc. Type 5.  6.

Password

Confirm

7.

	Acct Date	Acct #	Doc. Type
<input checked="" type="checkbox"/>	080919	8/9/2019	Doc1
<input type="checkbox"/>	080919	8/9/2019	Doc2
<input checked="" type="checkbox"/>	080819	8/8/2019	Doc1
<input type="checkbox"/>	080819	8/8/2019	Doc2
<input checked="" type="checkbox"/>	080819	8/8/2019	Doc3



## Fill Information to be Released TO

There are two ways to fill the 'Information to be Released TO' section:

### 1: Manually Fill Information to be Released TO

Manually fill the Name, Address, City, State, ZIP, Phone, and optionally Fax.

Information to be Released TO

Name

Address

City  State  Zip

Phone  Fax

### 2: Scan Information to be Released TO

Scan a driver license using a desktop scanner

1. Click 'Select Scanner' and select a USB-connected desktop scanner. If there are multiple options for the same scanner, pick the 'TWAIN' option.
2. Click 'Scanner Settings' to open the scanner settings dialog. The dialog may change depending on the type of scanner. Settings will be saved once they are defined.
3. Click 'Scan ID' to scan a driver license.
4. Click the red 'X' to remove the picture and try scanning again.

Information to be Released TO

~~Name~~

~~Address~~

~~City  State  Zip~~

~~Phone  Fax~~



### Additional Release Information

1. Purpose of Release – Select a purpose of release
2. Select any boxes that apply to the documents being released

1. Purpose of Release

You may use or disclose health care information regarding testing, diagnosis, and treatment for (check all that apply)

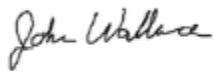
2.  HIV (AIDS virus)  Sexually Transmitted Diseases  Psychiatric disorders/mental health  Drug and/or Alcohol use

## Patient/Legal Representative Signature

The signature function only works with Topaz signature pads produced by Topaz Systems Inc. The recommended model to use is Model T-L462.

1. Click 'E-Signature' to open the signature dialog. Click 'Done' on the signature dialog to save the signature
2. Type in the signatory's relationship to the patient

### Signature of Patient/Legal Representative

<input type="text" value="2/25/2020"/>		<input type="text" value="Self"/>
Date	1. <input type="button" value="E-Signature"/>	Relationship to Patient

## Encrypting and Exporting Medical Records

Controls for encrypting and exporting the medical records are in the top right of the screen

1. Ask the patient to provide a password and type it into the 'Password' and 'Confirm' boxes
2. Click 'Export' to export the selected documents, decryption program, decryption instructions, and a PDF copy of this release of information to a folder. Use the folder dialog box to choose a folder to export to. A PDF copy of this release of information will be saved to DocuWare with this patient's information in the index fields.
3. Click 'Save to DW' to save a PDF copy of this release of information to DocuWare without exporting the documents to a folder. The PDF copy will be indexed with this patient's information.
4. Click 'Cancel' to reset this screen



### THIS INFORMATION

The screenshot shows a form titled "THIS INFORMATION". On the left side, there are several input fields: a text box, a date picker showing "15", another date picker showing "15", and a blue button labeled "counts". On the right side, there are two password fields labeled "Password" and "Confirm", both containing six black dots. Below these fields are three blue buttons: "Export" with a folder icon, "Save to DW" with a folder icon, and "Cancel" with a circular arrow icon. Red numbers 1, 2, 3, and 4 are placed to the left of the password fields and buttons respectively, indicating the steps described in the list above.