# **How-to Guide**

# **Extracting Patient Demographics from Scanned Medical Records**

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## **1. Introduction**

This guide provides a step-by-step procedure for extracting patient demographic information from scanned medical records using Telegenisys software Visualise Medical Records (VMR). Accurate and efficient demographic data extraction is crucial for patient identification, record linkage, billing, and compliance within medical data processing workflows.

## **2. Purpose**

The purpose of this guide is to enable users to effectively and accurately extract essential patient demographic data (e.g., Patient Name, Date of Birth, Address, Medical Record Number) from various scanned medical document formats. Following this procedure ensures data consistency, reduces manual entry errors, and optimizes processing time for medical records.

## **3. Audience**

This guide is intended for all Telegenisys personnel responsible for medical data processing, including Data Entry Specialists, Medical Coders, Quality Assurance Analysts, and anyone involved in the initial intake and digitization of medical records.

## **4. Prerequisites**

Before you begin, ensure the following:

* You have an active user account and login credentials for VMS.
* You have a stable internet connection.
* The scanned medical record document (e.g., PDF, TIFF, JPEG) is accessible on your local machine or network drive.
* The scanned document is clear, legible, and oriented correctly (not upside down or sideways) to ensure optimal OCR (Optical Character Recognition) performance.

## **5. Procedure: Extracting Patient Demographics**

Follow these steps to extract patient demographic information from a scanned medical record:

### **Step 5.1: Log In to the Software**

1. Open your web browser (e.g., Google Chrome, Mozilla Firefox).
2. Navigate to the VMS login page: https://app.telegenisys-medextract.com (Example URL).
3. Enter your **Username** in the designated field.
4. Enter your **Password** in the designated field.
5. Click the **"Login"** button.
   * *Expected Result:* You should be redirected to the software's main dashboard or document upload interface.

### **Step 5.2: Upload the Scanned Medical Record**

1. From the main dashboard, locate and click the **"Upload Document"** or **"New Extraction"** button. This is typically prominent on the screen.
2. A file selection dialog box will appear. Navigate to the location of your scanned medical record document.
3. Select the desired document file (e.g., Patient\_Record\_Doe\_John\_2023.pdf).
4. Click **"Open"** or **"Choose"** in the file selection dialog.
5. The system may display a progress bar indicating the upload status.
   * *Expected Result:* The document is successfully uploaded, and a preview of the document appears on the screen, often with an "Extraction in Progress" indicator.

### **Step 5.3: Initiate Demographic Data Extraction (Automatic)**

* Upon successful upload, the software will automatically begin the data extraction process using its built-in OCR and AI (Jasper) capabilities. This process typically takes a few seconds to a minute, depending on document complexity and system load.
* You will see an indicator (e.g., "Processing...", "Extracting Data...") while the system works.
  + *Expected Result:* Once the extraction is complete, the document preview will be displayed alongside a data entry panel or form, pre-populated with the extracted demographic information. Extracted fields might be highlighted in the document preview.

### **Step 5.4: Review and Validate Extracted Data**

1. Carefully review each pre-populated field in the data entry panel against the original scanned document displayed next to it. Focus on the following key demographic fields:
   * **Patient Name:** First Name, Last Name, Middle Initial.
   * **Date of Birth (DOB):** Ensure correct format (e.g., MM/DD/YYYY).
   * **Gender:** (Male/Female/Other).
   * **Address:** Street, City, State, Zip Code.
   * **Phone Number:**
   * **Medical Record Number (MRN):**
   * **Account Number (if applicable):**
   * **Date of Service (DOS):**
2. **Correct any inaccuracies:** If a field contains incorrect or missing information, click on the field in the data entry panel and manually type in the correct data based on the scanned document.
3. **Verify highlighted areas:** Pay attention to any areas the software has highlighted or flagged for review, as these might indicate lower confidence in the OCR extraction.
4. **Add missing data:** If a required demographic field is not extracted, manually input the data from the scanned document.
   * *Expected Result:* All demographic fields are accurately populated and validated against the source document.

### **Step 5.5: Save and/or Export Extracted Data**

1. Once you have thoroughly reviewed and corrected all demographic data, locate the **"Save," "Submit,"** or **"Complete Extraction"** button.
2. Click the button to finalize the extraction for this document.
3. The system may prompt you to confirm the action or indicate successful saving.
4. If required for your workflow, locate the **"Export"** or **"Download"** option (e.g., as a CSV, XML, or JSON file) and select your preferred format.
   * *Expected Result:* The extracted demographic data is saved within the system and/or downloaded to your local machine, ready for further processing or integration. The document status may change to "Completed" or "Reviewed."

## **6. Verification**

To verify that the demographic data extraction was successful:

* Check the status of the document in the software's dashboard; it should reflect "Completed," "Reviewed," or similar.
* If you exported the data, open the exported file (e.g., CSV) and confirm that all demographic fields are present and accurate.
* If applicable, search for the patient using the extracted MRN or Patient Name within the software's search functionality to confirm the record is accessible and complete.