

**FILE TRACKING****File Tracking Specifications**

This real-time system uses basic workflow techniques and e-mail notification to facilitate the movement, reporting and inventory tracking of a paper records system. FileBound works well in a file room environment and can be easily upgraded to add digital imaging. In addition, FileBound integrates with outside vendors such as record centers and conversion service bureaus to further extend your records management program.

Listed below are some of the key features. If you don't see a feature that you need, use the Contact Us form as we are always looking for great ideas.

System Highlights**ASP Service**

- Web-based solution means there is no technology to buy, hence no capital expenditure or on-site technical expertise required
- Software updates are done on the web server and are automatic. No end-user involvement required
- As a web-based solution, FileBound is inherently multi-user
- FileBound Data Center is in a world-class facility.
- Available as an in-house solution or combination of both

Parameter driven

- Custom index fields
 - Text, Numeric, Date/Time and Terminal Digit field types
- Checklist Maintenance
 - Simple checklist to manage mandatory file documents
 - Advanced checklist feature assigns responsibilities and deadlines
- Custom Reason fields (reason for checking a file out)
 - Example - Client Visit, File Update, Audit, Archive, Destruction, etc.
- User Maintenance
 - System Administrator can set up Users with passwords
 - Users automatically prompted to change password
- Group Maintenance
 - Clients can designate Groups that link access security levels and system wide capabilities
- Vendor Maintenance
 - Client can setup complete Vendor files for integration and interaction with their microfilming, scanning or record center vendor

HIPAA Compliant

- Tracks Patient Privacy Policy version as required
- Tracks routine and non-routine usage as required
- Tracks and generates reports of all file activity
- File notepad for patient "opt out" incidents
- Complete records management program

Comprehensive Report Generation

- Login, File Activity, File Inactive, File Destruction Report, Pending Request, File Inventory
- Compliance with regulatory agencies
- Administrators have the ability to generate reports on either user or file activity
- Be instantly up to date on status of all files
- Complete history tracking

Print Bar-code labels

- FileBound is integrated with the industry leader, NetLabels.com. NetLabels.com prints labels for folders and documents to link the management of paper and digital-based records, providing maximum integrity for all of an organization's information assets. By printing bar code labels for the folder and documents, records are ready for tracking and imaging using the reliability of bar codes to avoid the time, cost and errors associated with data entry
- Optional NetLabel Manager allows label printing to be directed and managed by an assigned operator. Printed labels are managed to allow for duplication checking and reprinting

Records Retention Schedule/Check List

- Client can enter a Destruction Date and pull a File Destruction Report

User status and information is displayed upon login

- The User gets a summary of all files that are check out to them and the files they have requested. The detail information is displayed

Search capabilities

- The user can search on any field or multiple fields simultaneously with partial index values
- Complex searches such as "and/or" criteria
- Search results display all index values with current file status (checked out etc.)
- Search for Boxes/Containers or files in a Box/Container

Batch Functionality

- Batch Checkout/Transfer
 - Used to move a large number of files to Record Center, Conversion Service Bureau or second location
 - Used in a scenario when a user makes a file request and all requests are transacted through a central file room
- Batch Check-in
 - This provides an operator with the ability to check in multiple files as a streamlined process
- Batch Request
 - Designed for users at remote locations. They can optionally request hard copy, fax or digital (requires Image Request Manager module)
 - Designed for use by the central file room or individual users to request multiple files with a single transaction from a Record Center, Conversion Service Bureau or second location
- Batch Print NetLabels
 - Select Label Style then batch print color-coded labels that are fully integrated.

New File Entry

- This function requires proper security access and allows the user to enter new file information for one or multiple files
- Importing of file information allows for new Clients to add their existing database in an automated process
- Optional Box entry
- Integration to NetLabels.com. Records added to the FileBound database can have corresponding labels printed for file folders and documents. Folder labels can be printed to include color-coding, bar codes, text, graphics or about any feature required and can be designed to maintain the look and function of an existing filing system

File Location – File Check in – File Check out – File Transfer**Administration**

- Control data integrity and user access
- Manage Users, File Types and volumes
- Add/delete/edit files and other settings

Ability to backup and restore system settings in automated fashion