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Introduction to scanning forms

The purpose of this tutorial is to teach investigators how to go from paper forms to electronic data in a database. This guide will explain how to scan forms using the Teleform Scan Station as well as how to verify this data using Teleform Verifier. This guide will also explain logistically issues involved in scanning including location and scheduling the use of the scanner.

The Cardiff website provides an excellent high level overview of the Teleform application and is available at:

Location of Teleform Scanner

The Teleform scanner is located in the investigator workstations area on the 10th floor of the Hatfield Research Center.

Directions to Investigator Workstations from Elevator “E”

1. **Left** from the “E” elevators and walk past the receptionist area.
2. **Left** before the entrance to the Bionutrition/BECC unit.
3. **Right** as the hallway forms a “t” and you can no longer continue.
4. **Left** as the hallway forms another “t”.
5. Proceed **left** as the hallway winds around a corner.
6. **Right** before the entrance to the Core Laboratory.
What you need to get started

1) A OHSU Novell Login to access a computer at the investigator workstations

2) A user account on the Teleform system
   a. If you need a new account or have forgotten your login information please e-mail octrihlp@ohsu.edu
   b. Please note: A Teleform account is not the same as your Novell account

3) A reservation to use the Scan Station (described later in this guide)
Reservation Steps

Access to the Teleform scanner is scheduled by a GroupWise resource called “Teleform Reader”. Requesting an appointment through GroupWise will reserve the resource for your sole use. Scheduled appointments will always take precedence over drop-in access to the scanner. If you have to cancel an appointment or finish scanning early please either cancel your appointment or send an e-mail to TeleformReader@ohsu.edu.

To Schedule an Appointment:

1. Open GroupWise

2. From the GroupWise Menu Bar select File → New → Appointment

3. In the To: field in the Appointment dialogue type in: “Teleform Reader”
4. Click on the calendar icon to the right of the **Start Date:** field.

   ![Calendar Icon](image)

   **Start date:** 5/30/2007

   The GroupWise calendar appears:

   ![GroupWise Calendar](image)

5. Click on the desired date you wish to use the scanner on the calendar screen.

   The GroupWise calendar disappears and you are returned to the New Appointment window.

6. From the GroupWise file menu select **Tools ➔ Busy Search …**

   ![Busy Search Dialogue](image)

   The Busy Search Dialogue appears. The black outlined rectangle represents the requested meeting time. In our example there is conflict with a previously scheduled appointment on the Teleform Reader circled in red below.

   ![Busy Search Conflicts](image)
9. If necessary, click and drag the meeting rectangle to a time that is free for both parties. Meeting time can be extended or reduced in this window by clicking and holding on the left or right edge of the meeting rectangle to resize it. In the event of no available times and approaching deadlines please email octrihlp@ohsu.edu

Please note: GroupWise will allow you to schedule a time when the scanner is in use. Please avoid doing this. Appointments which conflict with other times will be automatically rejected.

![Choose Appointment Time](image)

10. Once you have a conflict free time click **Ok**.

11. Click on the **Send** Button to reserve your time on the Teleform scanner.

12. An appointment will now appear on your calendar.
Scanning Procedure

This section will describe how to scan your Teleforms using the Teleform Scan Station and the Panasonic KV-S3065C high-speed scanner.

1. Click on the **Start Menu** and then navigate to **Programs ➔ Verity Teleform ➔ Teleform Scan Station** to open the Teleform Scan Station program.

2. Enter your Teleform login information into the login screen.

Please note: As mentioned earlier, Teleform requires a unique user account to use, which is **not** the same as your Novell account. If you have forgotten your login information or you need a Teleform account setup please e-mail **octrihlp@ohsu.edu**
3. Select: **File ➔ New Batch** from the Scan Station menu bar.

4. Click on the **Job** list and select your Clinical Research Center (CRC) protocol number from the drop down menu in the new batch dialogue window. Note your CRC number is **not** the same as your IRB number.

5. It is necessary to generate an identifying name for your scanning job to distinguish your scans from others. Type in **your_protocol#_your initials** in the **Tracking ID** Field. Example: CRC1234_EWS.

6. Click on the **Process** tab in the new batch window.
7. Ensure Scanner has the following settings:
   **Source**: Panasonic KV-S3065C  
   **Settings**: (Default)  
   **Feeder**: If your form is printed double sided select **Front & Back** under Feeder settings. If your form is printed single-sided select **Front Only**

8. Place forms **face up** in the KV-S3065C scanner.

9. Click on the **Start** button to begin scanning.

   Notice how your scanned images appear in the New Batch window.

   It is a good practice to verify that the image count in Teleform matches a physical count of the pages you scanned. If your expected count and the Teleform count do not match click the **Discard** button and go back to step 3.
10. If you have more forms you wish to scan, place them in the scanner tray and press the **Continue** button. Otherwise, if you are finished scanning click the **Accept** button.

The window will automatically transfer to the **Batch Explorer** window. The newly scanned batch appears under today’s date. Notice the current status is “**Batch queued**”. This means that this batch has yet to be processed by the Teleform reader. The processing time is dependent on the number of pages scanned as well as the number of other batches waiting to be scanned.
When the Teleform reader has finished processing your forms the status will change to “Ready for Evaluation”.

11. Close the Teleform Scan Station by choosing **File ➔ Exit**
How to Review and Verify your Data

This section will describe how to use Teleform Verifier to correct interpretation ambiguities in your scanned data.

1. Click on the Start Menu and then navigate to Programs → Verity Teleform → Teleform Verifier to open the Teleform Verifier program.

The Teleform Verifier Batch Management Dialogue Menu appears. We can distinguish batches based on their Tracking ID. Notice one form needs review.
Please note: Depending on your level of access you may see several batches or only the batch you have recently scanned.

2. To Review the Form click the **Process** button on the right side of the Batch Management Dialogue.

3. From the Correction Mode Toolbar click the Form Mode Icon.

There may be several different types of corrections that are necessary for each form. We will go through two examples: one with numeric data and another with multiple-choice data.

**Example 1:**

Teleform Verifier now presents you with your first correction in the Form Mode correction style. (In this example, it is a correction needed for a date).
Use the left (←) and right (→) arrow keys to advance the yellow cursor. Values marked in red indicate corrections that need to be made. In our example, press ‘1’ with the cursor at the current location to replace the incorrect value of ‘7’ (Teleform’s best guess).

Press the ‘Tab’ key when you are finished making correction on this field.

Example 2:

Verifier may also present you with correction for multiple-choice data.

In this example, we will assume the participant intended the “No” response and crossed out his previous answer of “Yes: Moderate. It’s affect”.

To make this change, click on the “Yes: Moderate, It’s affect” checkbox once to deselect the response. Click on the No checkbox to select this response.
Use the “Tab” key to advance to the next correction.

4. When all corrections are completed you will be prompted to save your corrections to a result file. Choose **Ok**.

You will be returned to the Batch Management Dialogue screen.

5. From the Batch Management Dialogue right-click on your batch and select **Commit**. The data from your scanned forms has been committed to the database.

6. From the Verifier Menu bar select **File** → **Exit**
Resources to Contact:

The use of the Teleform program and investigator workstations are provided by the Oregon Clinical and Translation Research Institute.

At Oregon Health Science University, the Research Helpdesk is the primary contact for Informatics Support.

Online: www.octri.org/helpdesk

E-mail: octrihlp@ohsu.edu

Desk Phone: 503-498-9800

Pager: 16347 (For urgent immediate support only)