

## Acuant Scanning Overview

1

Setup

1

## SCAN

2

How to Review Data:

4

How to delete a scanned document

5

How to Print a previously scanned image?

5

What is the best way to move an insurance card that is attached to the wrong insurance?

5

## Acuant Scanning Overview

Scanning directly from a local scanner into our cloud-based system is available with new integration using Acuant scanning technology.

- Scan directly into the cloud \*bypass local scan/upload process
- Duplex Scanning
- Scan Driver's License and auto-pull data using the Barcode or OCR
- Scan Insurance Card and auto-pull data using OCR technology
  - Capture and store photos from a Driver's License or Passport
- Auto-rotate images
- Recommended Card Scanner- **ScanShell 800DXN Duplex scanner**
  - If you choose to use other TWAIN compatible scanners, some functions may not be supported

To sign up to be a beta site for the new scanning workflow, or to have sales contact you when the feature becomes generally available, please complete the following form: [Scanning Signup Form](#)

See the Help Center > Videos: Patient Registration & Navigating the Patient Dashboard, Insurance Management.

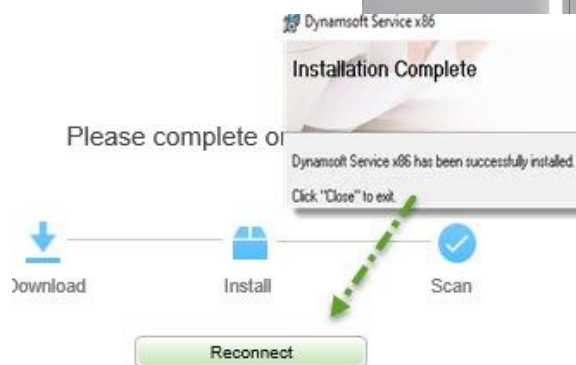
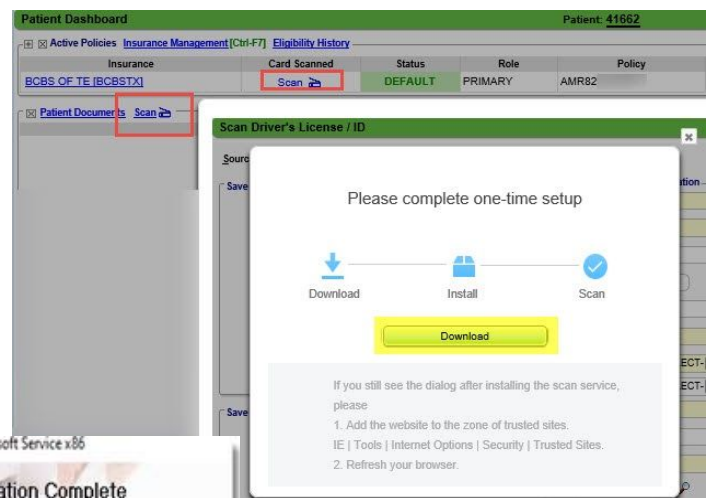
## Setup

One-time setup. From the Patient Dashboard > Click 'Scan' > a pop-up will prompt you to download and install Dynamsoft. \* This may vary based on what device is in use. This allows the browser to communicate with devices such as scanners and printers.

Click [Download]

Follow the steps to installed the service

Click [Reconnect] to reload or simply close and click 'Scan' again

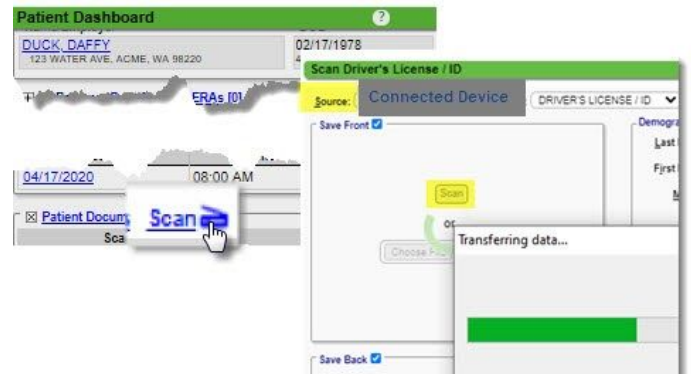


## SCAN

Use the 'Scan' Icon for Insurance, Driver's Licence, or other Identification Images and data are populated to the appropriate places.

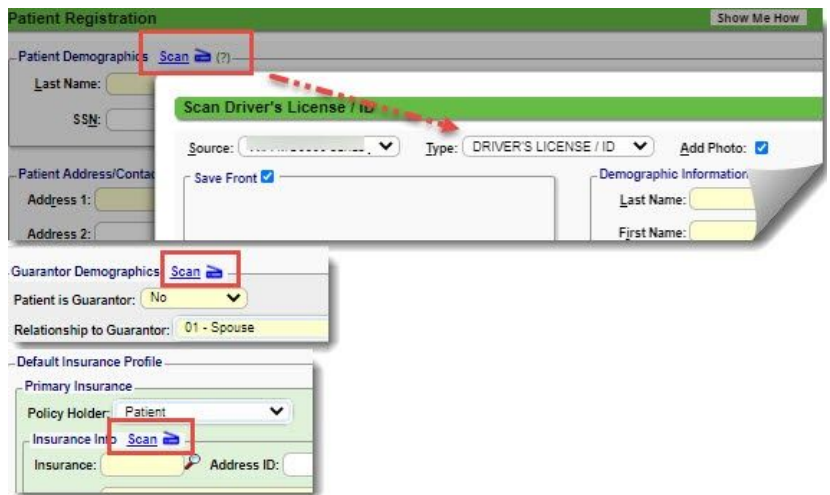
Click [Scan] after placing the ID in the scanner:

- A. During **Registration**:
- B. **Patient Dashboard** or **Modify Demographics**:
- C. **Insurance Policy**
- D. **Calendar**:
- E. **Guarantor**



A. **Registration**: When registering a New Patient, the user can scan for the following information:

- Patient Demographics
- Guarantor Demographics
- Insurance Policy



B. **Patient Dashboard** and **Modifying a Patient**

- Patient Demographics
- Insurance Policy



The user should make a careful review to verify the Old information versus the New Information. Make a decision to keep or overwrite existing information.

Driver's Licence/ID

1. [Review Changes] - opens a new screen for review
2. [Save Card Only] - this will not update demographic information
3. [Cancel]



## C. Insurance Policy

It may take up to 10-15 seconds to scan an Insurance Card whereas a Driver's licence scans with the barcode.

- Insurance must be chosen from your library
- Review data for accuracy
- [Review Changes] - opens a new screen for review
- [Save Card Only] - this will not update information

If the card is not recognized: At least 90% of the card must be visible. Try wiping clean and re-scan

In some rare cases, the scan may not recognize Front and Back positions in the previews. Use the 'Swap' icon



**Scan Insurance Card**

Source: WIA-MG6800 series | Type: INSURANCE CARD

Save Front  | Save Back

**Policy Info** [Pull Data](#)

Insurance: CIGNA  
 Address ID: CIG2  
 Policy: 9999999  
 Group:   
 Group Name:   
 Plan:   
 Product: - SELECT -  
 Effective:   
 Expiration:   
 Copay:   
 Assignment: Yes  
 Eligibility Payer ID:

**Policy Note**  
primary

Buttons: Accept Changes [F2], Save/Check Eligibility, Cancel

If you scan an existing policy, you may be prompted to make additional changes to 'Insurance Management' in a popup or make updates to the policy



**Document Review**

Current Policy Info

Insurance: CIGNA  
 Address ID: CIG2  
 Policy: 99999  
 Group:

Updates From Card

Insurance: CIGNA  
 Address ID:   
 Policy: 99999  
 Group:

Policy Note: primary

Update Policy Information:  | Accept Changes [F2] | Accept & Manage | Cancel

View scanned insurance card image in hover-over

Insurance	Card Uploaded	Status	Role	Policy
AETNA [AETNA]	01/17/2020	DEFAULT	PRIMARY	4654654654

Front

aetna  
COVENTRY

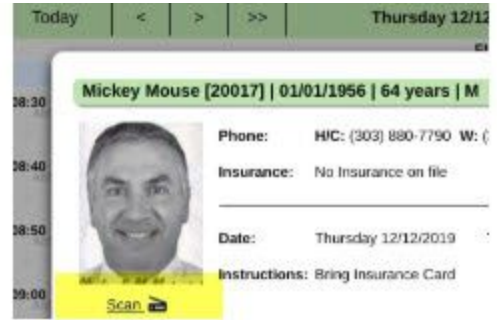
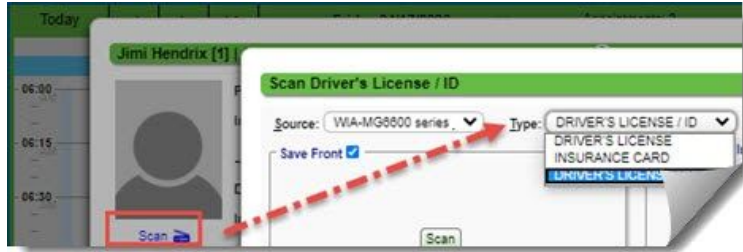
Group Name: ADVANTRA PLATINUM PPO  
 Plan Name: AETNA MEDICARE  
 Name: xxxMEMBERxNAMExxx  
 ID #: xxxMBRxnBR-xx  
 Issuer: 80540  
 Group #: xxGRPxNBRx  
 PCP Name: PCP NAMExxxxxxxxxxxxxxxxxxxx  
 PCP Phone #: XXX-XXX-XXXX  
 PCPOLITXX ER/ERX  
 SPEC:SPX

RxBIN: 610502  
 RxPCN: MEDDAET  
 RxGRP: RXAETD

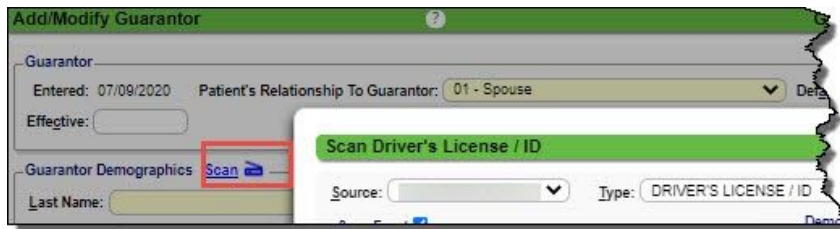
MedicareRx  
 Issue Date: XXX/XXX/XXXX

**D. Calendar:** The on-file photo displays, on the Add Appointment and on the Check In/ Manage an Appointment screen

Use 'Scan' under the picture area to add any Document Type Review, if records already exist before accepting any changes



**F. Guarantor - Driver's License/ID only**



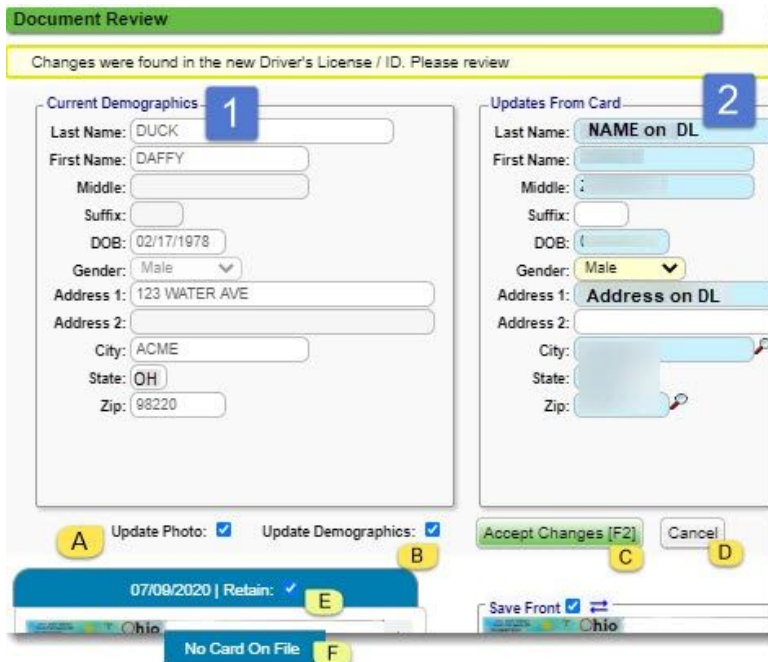
**How to Review Data:**

After Scanning the Driver's License/ID, choose [Review Changes]

We recommend patient confirmation of their current address



1. Current Demographics
2. Update from Card



- A. Uncheck if no update is needed
- B. Uncheck if #2 is not current
- C. Accept changes if any exist
- D. Cancel any action

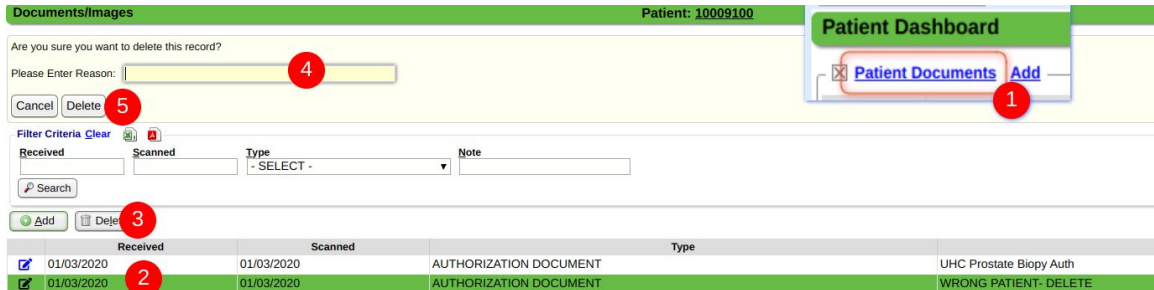
- E. Retain the image
- F. No card on file



## How to delete a scanned document

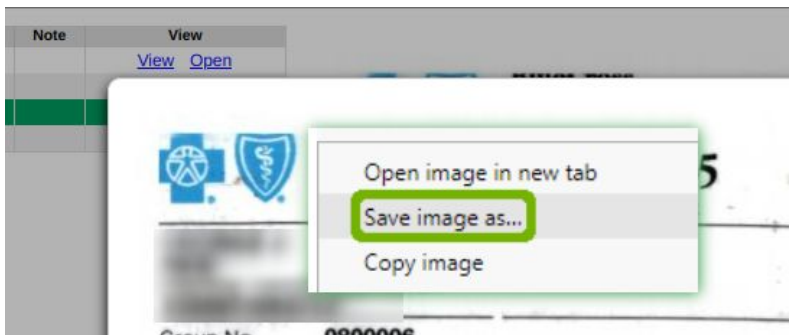
To Delete a document > From the patient dashboard >

1. Click 'Patient Document'
2. Highlight the document
3. Click [Delete]
4. Add a Reason for deleting
5. Click [Delete]



## How to Print a previously scanned image?

Click 'View'. Right-click on the image and choose 'Save Image As' or 'Print'



## What is the best way to move an insurance card that is attached to the wrong insurance?

From the 'Patient Dashboard' > Click the Patient Documents link

- Click the pen 'Edit' icon
- In the Popup > select the correct policy
- [Save]

