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
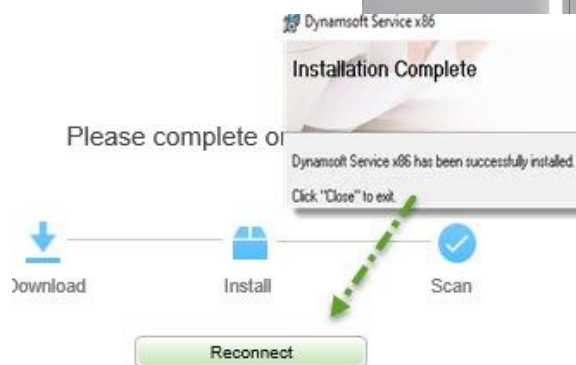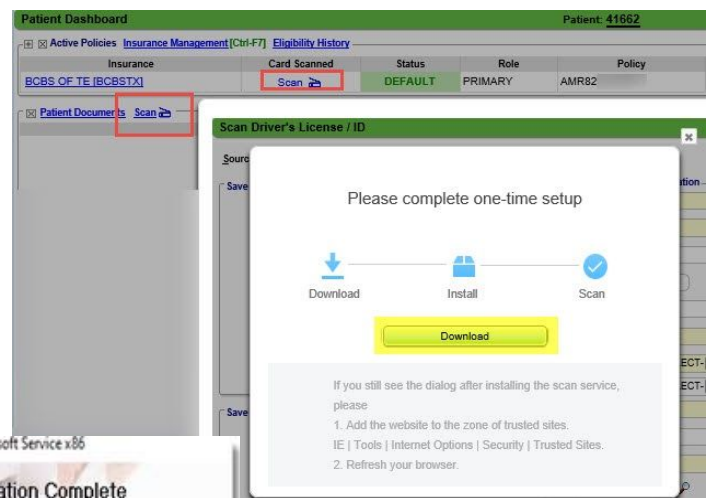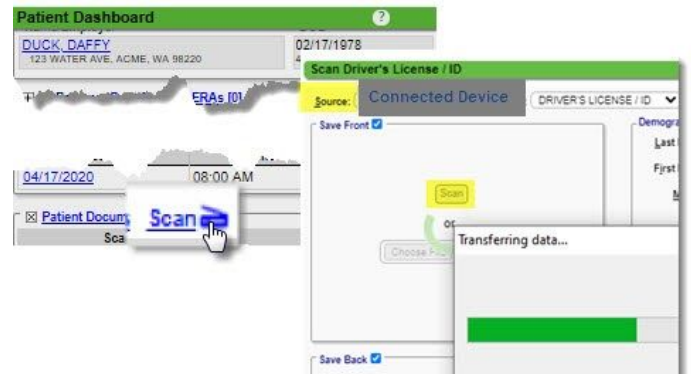
SCAN

Use the 'Scan' Icon for Insurance, Driver's Licence, or other Identification Images and data are populated to the appropriate places.
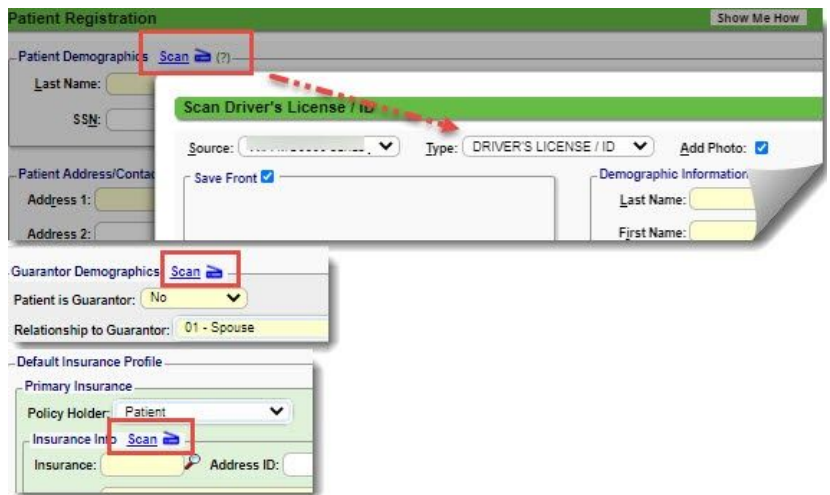
Click [Scan] after placing the ID in the scanner:
- A. During **Registration**:
- B. **Patient Dashboard or Modify Demographics:**
- C. **Insurance Policy**
- D. **Calendar:**
- E. **Guarantor**

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

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

View scanned insurance card image in hover-over
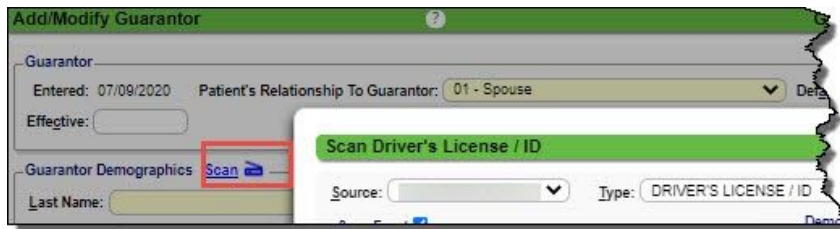
D. Calendar: The on-file photo displays, on the Add Appointment and on the Check In/ Manage an Appointment screen

Use 'Scan' under the picture area to add any Document Type

Review,if records already exist before accepting any changes
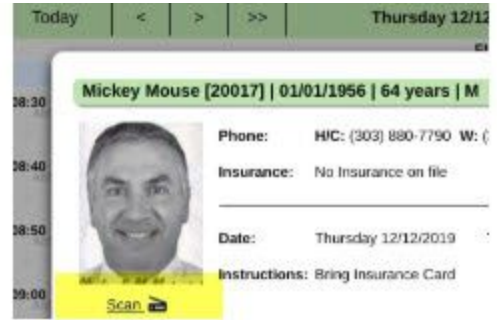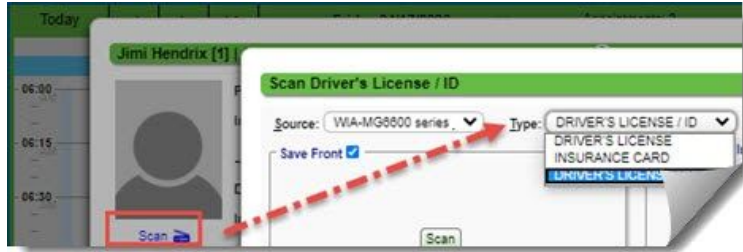
F. Guarantor - Driver's License/ID only

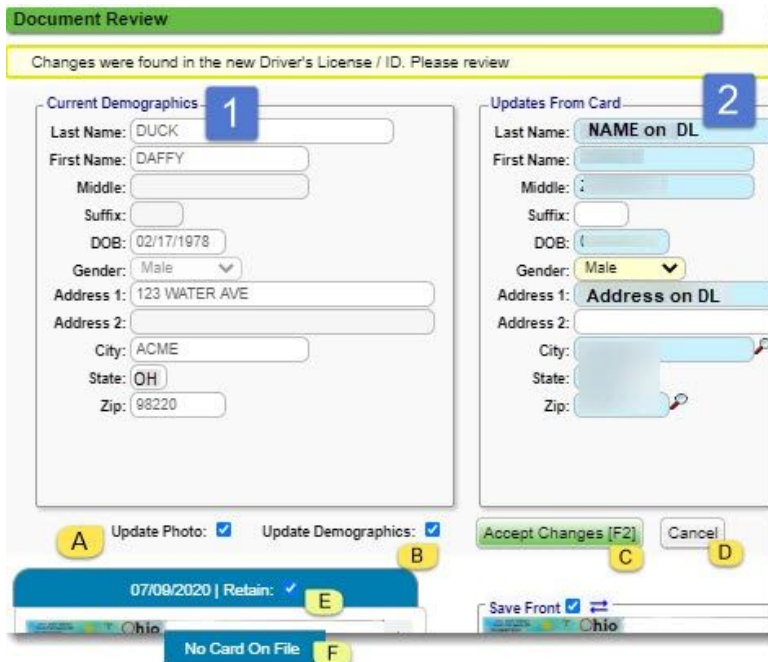## How to Review Data:

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
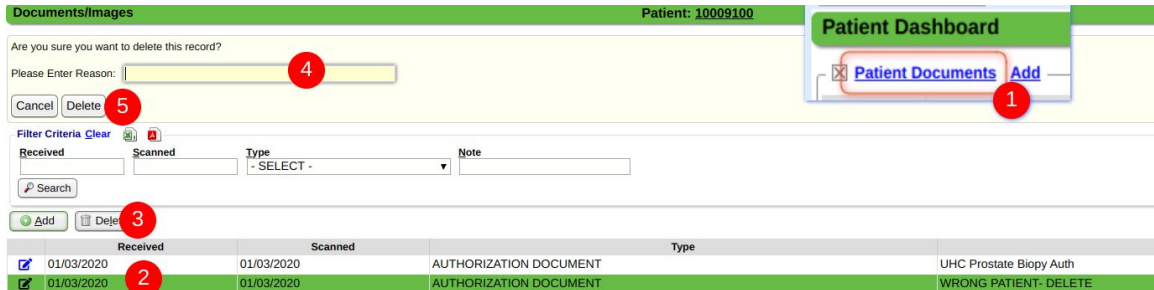D. Cancel any action

   Variable if an image exist
E. Retain the image
F. No card on file
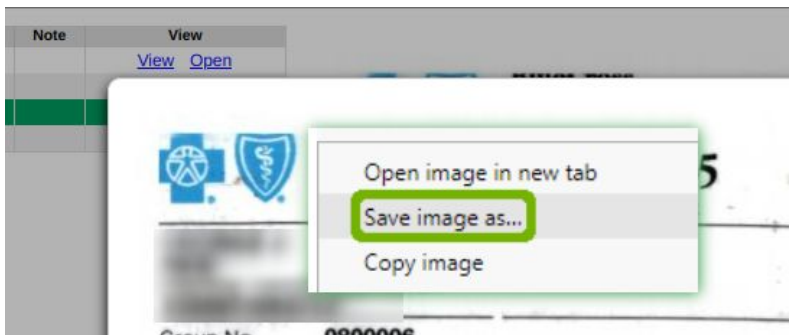
How to delete a scanned document

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]