

Scanning Insurance Cards

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Version 20.16

About

Insurance cards can only be scanned on a workstation connected to either a card reader or document scanner.

Scanning the Card using a Card Scanner

1. Navigate to the Manage Documents window:
 - **Clinical or Practice Management tab > Document Mgmt button**
 - **Clinical, Practice Management, or Billing tab > Patient Chart button > Documents**
2. Click the **New Document** button.



Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click **None**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

3. Insert the card into the card scanner.
4. Click the **Card Scanner** button to activate your card scanner. The Scan Options window (or your scanner's own scanning interface) is displayed.
5. Click the **Scan** button to scan the card.
6. Repeat to scan the other side of the card (if needed). Images of both sides of the card are displayed as thumbnails in the Sketch Panel.
7. Proceed to follow the steps in the **Labeling the Card** section below.

Scanning the Card using a Document Scanner

1. Click the **Document Mgmt** button to open the Manage Documents window.
2. Click the **New Document** button.



Note: If a patient was previously selected, their Document information is displayed in the Document Details panel of the window. You'll receive a confirmation window asking if you want to retain that information. Click **None**, **Details**, or **All**. Any information you choose to retain can be edited, as appropriate, before saving. Clicking **Cancel** will close the confirmation and take you back to the previous record with no changes made to the current record.

3. Place the card onto the document scanner.
4. Click the **Page Scanner** button. The Twain interface must be enabled by using the **Use** radio button in the Twain Use/Hide field below the device icon buttons. The scanner activates and the Scan Options window is displayed.
5. Click the **Scan** button to scan the card.
6. Repeat with the reverse side of the card (if needed). Images of both sides of the card are displayed as thumbnails in the Sketch Panel.
7. Proceed to follow the steps in the **Labeling the Card** section below.

Labeling the Card

1. Select the **Image** in the Sketch panel.

2. Move the **Page** or pages to the Thumbnails panel.
3. In the Document Details Panel, confirm the correct patient is displayed or click into the Patient ID field and use the Patient Search icon to search for and select the patient.
4. Click in the Item Type field and use the drop-down to select **Insurance**.
5. Click in the Item Category field and use the drop-down to select **ID Card**.
6. Select the **Reviewed?** checkbox.
7. In the Administrative Details section, select **Returned** in Status of original (optional).
8. Click the **Save** button.

Version 20.15

Path: Clinical or Practice Management tab > Document Mgmt > New Document

Overview

Insurance cards can only be scanned on a workstation connected to either a card reader or document scanner.

Scanning the Card using a Card Scanner

1. Navigate to the New Document window by following the path above.
2. Insert a **Card** into the card scanner.
3. Click the **Card Scanner** button. This activates your card scanner. The Scan Options window (on your scanner's own scanning interface) is displayed.
4. Click the **Scan** button to scan the card.
5. Repeat to scan the other side of the card (if needed). Images of both sides of the card are displayed as thumbnails in the Sketch Panel.
6. Navigate to the **Labeling the Card** section below.

Scanning the Card using a Document Scanner

1. Click the **Document Mgmt** button to open the Manage Documents window.
2. Click the **New Document** button.
3. Place the Card onto the document scanner.
4. Click the **Page Scanner** button. The Twain interface must be enabled by using the **Use** radio button in the Twain Use/Hide field below the device icon buttons. The scanner activates and the Scan Options window is displayed.
5. Click the **Scan** button to scan the card.
6. Repeat with the reverse side of the card (if needed). Images of both sides of the card are displayed as thumbnails in the Sketch Panel.
7. Navigate to the **Labeling the Card** section below.

Labeling the Card

1. Select the **Image** in the Sketch panel.
2. Move the **Page** or pages to the Thumbnails panel.
3. Select the **Patient** by searching for the Patient ID in the Document Details Panel.
4. Select **Insurance** from the Item Type drop-down menu.
5. Select **ID Card** from the Item Category drop-down menu.
6. Select the **Reviewed?** checkbox.
7. In the Administrative Details section, select **Returned** in Status of original (optional).
8. Click the **Save** button.