

Scanning Insurance Cards

(Terminal Services Using RemoteScan™ with ScanShell 800NR)

Scanning the patient's insurance card in OD Professional, allows you to have a scanned image of the patient's insurance card attached to the patient's file

The benefits of having a scanned image of the patient's insurance card include:


- never losing or misplacing patient insurance information
- never worrying about making and having a clean legible photocopy
- saving space and expense by using less paper

There will be times when you'll need to refer to the patient's insurance card, especially if the insurance ID (e.g. policy number, group number, etc.) was entered in wrong. When using paper files, there are times when a file is lost or misplaced. By having a scanned image of the insurance card attached permanently to the patient's file, you will never have to worry about losing or misplacing this information again.

Photocopies can be too light or dark and tend to fade with time. And as your practice grows, imagine saving one sheet of paper for each patient. Overtime, that one sheet can add up and save you space and expense.

Scanning the patient's insurance card does not automatically enter the patient's insurance information in the Insurance Information View.

Scanning Insurance Cards:

1. Browse for patient and make active
2. Click on the Normal Capture icon on the toolbar 
 - a. Select the Scanner (e.g. Remote Scan™) from the list of available devices
 - b. Verify that the Continuous, TWAIN device and Scanning buttons are active / engaged
3. Click OK and the RemoteScan™ Window opens
4. Insert insurance card into scanner (remember that the side of the insurance card you want to scan should be face down)
5. Click Scan
6. Scanned image opens in separate window
 - a. Repeat steps 4-5 for reverse (e.g. back side) of the insurance card (if applicable)
7. Close RemoteScan™ window
8. Click the Save button (floppy disk icon) on the icon toolbar opening the Image Classification window
 - a. Although you can close the image window, which will prompt you to save the image, we strongly recommend using the Save button (floppy disk icon) for saving images
9. Enter name of image (e.g. insurance card front) in the first field in the classification section. You can choose to name each image with the name of the insurance company (e.g. Medicare front, BCBS back) if this is easier for you.
10. Click OK and close image window
 - a. Repeat steps 8-10 for all other images (if applicable)

Important: To maintain the integrity of the patient's health record, scanned images cannot be deleted in OD Professional.

****Scanner and related software settings may differ with each installation. Please refer to all equipment and software manuals for installation and setup instructions.***

Please refer to the "[Scanning Insurance Card Addition 2009](#)" job aid for more information.