



# PatientCollector for Centricity How-to Guide

01/16/2020 rev. 1.8

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# System Requirements

- Minimum: A recent 2.0+ GHz dual-core CPU (ex: Core i3). Optimal: Recent 2.0+ GHz quad-core CPU (ex: Core i5)
- Minimum 4 GB RAM (8GB or more recommended)
- Minimum 10 GB free hard drive space. We recommend using a solid-state drive (SSD).
- PC OS: Windows 10 or 7 with latest Service Packs and other updates (Desktop Mode Only)

# Scanner Maintenance

## Scanning Hardware:

- A6/A4 scanners (e.g. EcoScan, DocketPORT) need to be cleaned and calibrated monthly, at a minimum. If your scanners have not been properly maintained, they may require multiple cleanings to produce clear images. If after cleaning & calibration, a scanner still does not produce clear images, it must be replaced. Dirty scanners produce bad images which produce varied data extraction results. If you have any questions about scan quality, need a new scanner, or require cleaning and calibration sheets, contact [sales@inuvio.com](mailto:sales@inuvio.com) or [support@inuvio.com](mailto:support@inuvio.com).
- Please install all TWAIN drivers from the manufacturer's website to assure the latest version is being installed. TWAIN drivers are required for the use of PatientCollector. Go to <http://inuvio.com/service/downloads/> for the most up to date Inuvio drivers (including those for the Panasonic KV-S1026c).
- Low-end scanners may not be fully TWAIN compliant, though they may be advertised as such. Please contact [support@inuvio.com](mailto:support@inuvio.com) if you are experiencing scanning issues in conjunction with PatientCollector. To purchase a recommended TWAIN scanner for PatientCollector, contact [sales@inuvio.com](mailto:sales@inuvio.com).

# PatientCollector Overview

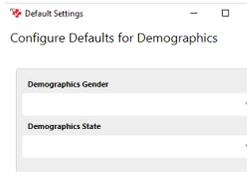
## PatientCollector Demographic Tab Overview

Below is a quick guide to the PatientCollector "Patient" tab.

Fields in Yellow are required and must be populated before saving. These include:  
Allocation Set, Financial Class, First Name, Last Name, DOB, Gender, Address Line 1, State, Zip Code, City.

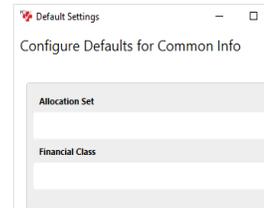


### Optional



This settings box will allow the option to have a global default Demographic Gender (Male/Female) and/or Demographic State (AL, AR, CA, NV...etc.).

### Optional



This icon will allow a default Allocation Set/Financial Set in the field any time a new patient is being created.



The cloud icon loads the current data info of an existing patients CPS profile



The card icon button uses the extracted off the scanned card image



The X icon button clears the data off the field



The top box icons will affect ALL data in the current tab of the Interface

Patient name and face image will be displayed here.

PatientCollector Desktop Edition (Inuvia Card Input)



Patient Primary Insurance Secondary Insurance Tertiary Insurance Quaternary Insurance Guarantor

Patient Demographics



Card Image



PC

First Name  DOB  Select a date

Middle Name  Gender

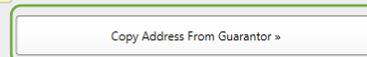
Last Name

Suffix

Address Line 1  State

Address Line 2  Zip Code

City



Patient Same As Guarantor?

I have verified the data before saving

Only update images

Update face image

I have verif

Only update images

Update face image

CARD IMAGE

Upload Images allows the user to import images of a patient's driver's license, insurance or hybrid cards into the profile. See page 5 for more details

Copies the address from the Guarantor tab.

Select this checkbox if you ONLY need the image of the patients INS or DL card. Selecting this prior to scanning will NOT extract any data.

Select this checkbox if you want the face image of the DL saved in CPS.

Select this check box after reviewing the data to be saved.

# PatientCollector Insurance Tab Overview

Below is a quick guide to the PatientCollector “Primary Insurance”, “Secondary Insurance”, “Tertiary Insurance”, and “Quaternary Insurance” tabs.

**Same as Patient:** When selected, the applicable fields will become read only and that data taken from the Patient tab.

**Same as Guarantor:** When selected, the applicable fields will become read only and that data taken from the Guarantor tab.

**Other:** When selected, data will be taken from the current insurance tab.

Fields in Yellow must be populated before saving. These include:

Allocation Set, Financial Class, First Name, Last Name, ID Number, Relation to Insured and Carrier.

*Optional*

Upload images will allow the user to upload individual card images into the patients CPS profile. File formats include: JPG, PNG, BMP, GIF, TIFF

Choose the Policy Status to be Active or Inactive. Leaving it blank will automatically be Inactive.

Choose Carrier will load the CPS Find Insurance Carrier dialog box

## PatientCollector Guarantor Tab Overview

Below is a quick guide to the PatientCollector “Guarantor” tab. Required fields, buttons, and dropdowns are like that of the “Patient” tab.

The screenshot displays the PatientCollector Desktop Edition (Inuvio Card Input) interface for the Guarantor tab. The window title is "PatientCollector Desktop Edition (Inuvio Card Input)". The main heading is "New Patient". The interface includes several tabs: "Patient", "Primary Insurance", "Secondary Insurance", "Tertiary Insurance", "Quaternary Insurance", and "Guarantor". The "Guarantor" tab is active, showing "Guarantor Demographics" and "Card Image" sections. The "Guarantor Demographics" section contains fields for "First Name", "Middle Name", "Last Name", "Suffix", "DOB", and "Gender". The "Card Image" section has "Upload Images" and "Remove Images" buttons. A callout box points to the "Copy Address From Patient" button, stating "Copies the address from the Patient tab." The interface also includes a "Save" button, a "Cancel" button, a checkbox for "I have verified the data before saving", a checkbox for "Only update images", a checked checkbox for "Update face image", and a "Scan" button.

# Choosing Existing Card Images and Workflow

## For customers who previously used ScanOCR

PatientCollector stores combined images to keep database sizes manageable. Previous applications such as ScanOCR stored front and back images separately. In order to transition properly to the new system using combined images in the CPS attachments, you may see an additional box using PatientCollector to load a patient record during registration. Please select the proper front and back (optional) images when prompted for each demographic and insurance section. This is an important migration step and must only be performed once per patient record.

Review the card images. Click to select images for the front and back (optional) of the card. If the back image is unselected, check 'Skip back image'. Once complete, click 'OK, use my selection'.

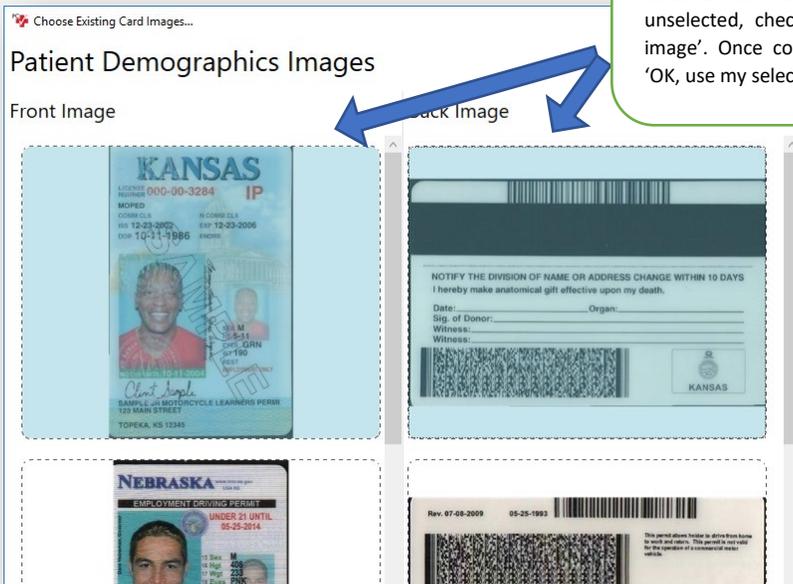
### Selecting Images workflow

1. Select the front and back ((optional) images of the card per the form title (e.g. Patient Demographics, Primary Insurance).
2. Click 'Ok, use my selection'
3. Combined images of the previously selected images will appear in the scanning interface once loaded.
4. Check 'I have verified...'

### Scanning new cards workflow

If none of the images aren't needed, follow the below process to scan in the newer cards. This process will remove the previous images and the pop-up box will not reappear.

1. Select front and back (optional) images of the card for either ID/DLs or insurance cards.
2. Click 'Ok, use my selection'
3. Scan the new cards using the scanning interface
4. The newly scanned images will appear
5. *Visually verify that the extracted data is correct*
6. Check 'I have verified...'



Select this check box if you choose to not select a back image of a card.

Skip back image

Selecting this box will cancel the entire selection process and no changes will be made.

*Note:* The image selection form(s) will continue to appear upon loading a profile until actual selections have been made.

Cancel, don't use any of these

OK, use my selection

The database contains multiple images for Patient Demographics. The front image is required. The back image is optional.  
Warning: Only the selected images will be kept. All other images will be discarded.

Skip back image

Cancel, don't use any of these

OK, use my selection

# Step 1: Download & Install

Two separate emails are sent to the primary contact of the account. Please open the emails and download both the PatientCollector Desktop Edition (Cloud) OCR and the CPS (Integrated with PCDE) OCR programs.

Next, download the software from the 64-bit links. These downloads will work for both 64-bit and 32-bit Operating Systems.

Software Licensing  
Inuvio  
You replied to this message on 9/13/2018 3:03 PM.

Thank you for choosing Inuvio for your imaging needs. Listed below is information regarding the product(s) you have purchased and the Product Code necessary for installation. Should you have any questions, please contact us by web or phone.

Your new Software Product Code(s):

Product Name:	Product Code:	Download Link
CPS (Integrated with PCDE) OCR	YV3F-██████████ ██████████E9KA	32-bit: <a href="#">CPS (Integrated with PCDE) OCR</a> 64-bit: <a href="#">CPS (Integrated with PCDE) OCR</a>

Order ID: INTERNAL - CPS Test 0001

**Our Contact Information**  
Email: [support@inuvio.com](mailto:support@inuvio.com)  
Phone: (214) 550-5995, Option 2  
Hours of operation: Monday - Friday 8:00 am - 6:00 pm CST

Best Regards,  
Inuvio  
811 E P  
Plano,

Software Licensing  
Inuvio  
10:57 AM

Thank you for choosing Inuvio for your imaging needs. Listed below is information regarding the product(s) you have purchased and the Product Code necessary for installation. Should you have any questions, please contact us by web or phone.

Your new Software Product Code(s):

Product Name:	Product Code:	Download Link
Patient Collector Desktop Edition (Cloud) OCR	W915-██████████ ██████████WPKA	32-bit: <a href="#">Patient Collector Desktop Edition (Cloud) OCR</a> 64-bit: <a href="#">Patient Collector Desktop Edition (Cloud) OCR</a>

ScanCloud Authorization Code (just the section between the lines):  
-----  
Is7tdtQ88OkqvITgCABEOW6vV3S2eTclBJOay7E3JVMudIUHl7f3wX8zgfz6bqEizejzI6SvJK2732S9jpnEfoY4F  
-----

Order ID: 1234567890

**Our Contact Information**  
Email: [support@inuvio.com](mailto:support@inuvio.com)  
Phone: (214) 550-5995, Option 2  
Hours of operation: Monday - Friday

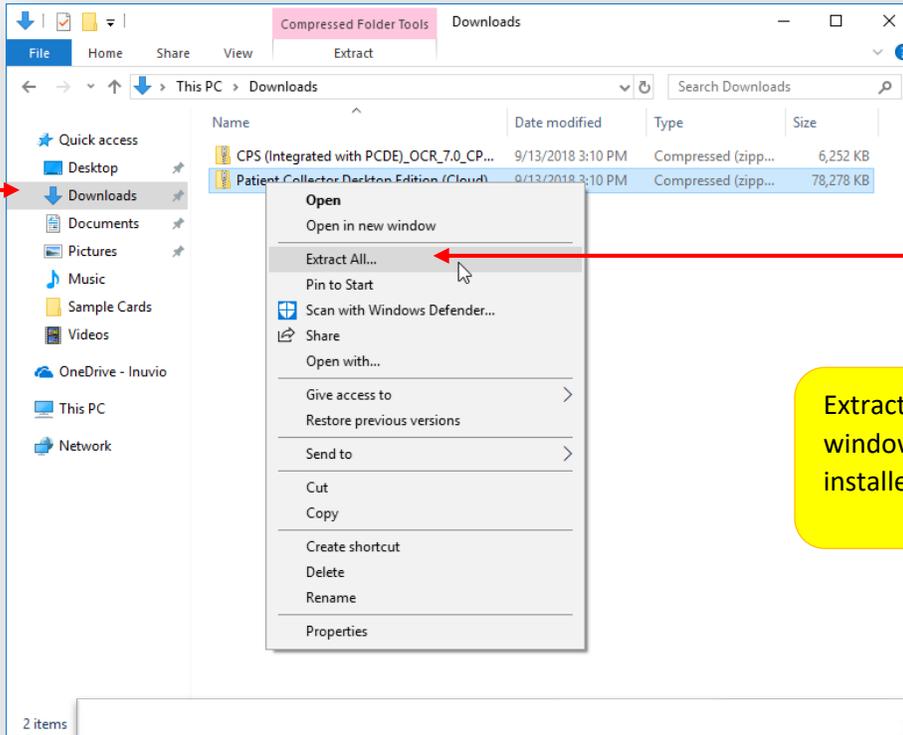
Ignore the Product Code for the CPS plugin. It is not needed.

This is your Product Code to license the software.

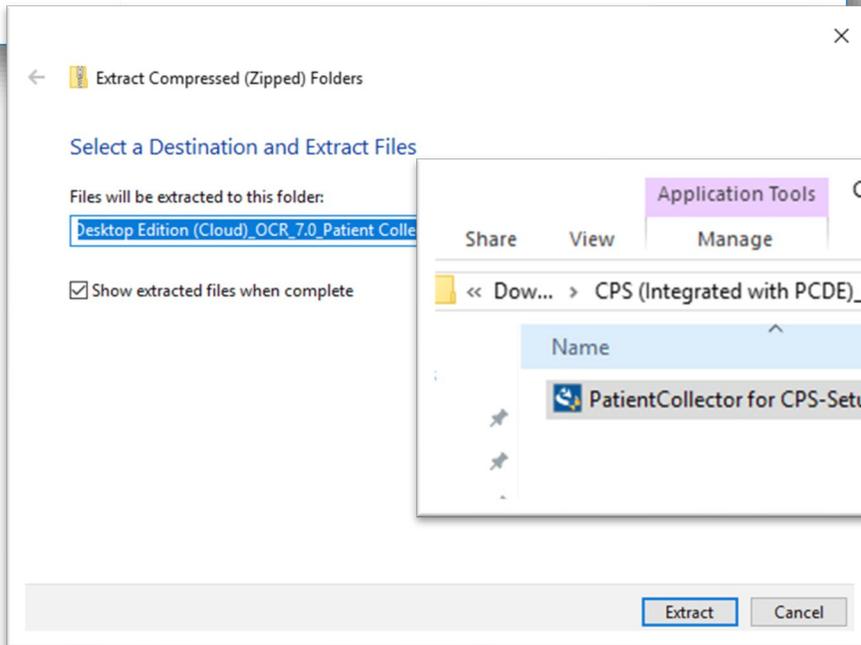
You will also need the ScanCloud Authorization Code during installation.



Go to the Downloads folder in **1**  
Windows Explorer  
(C:\Users\[UserName]\Downloads)

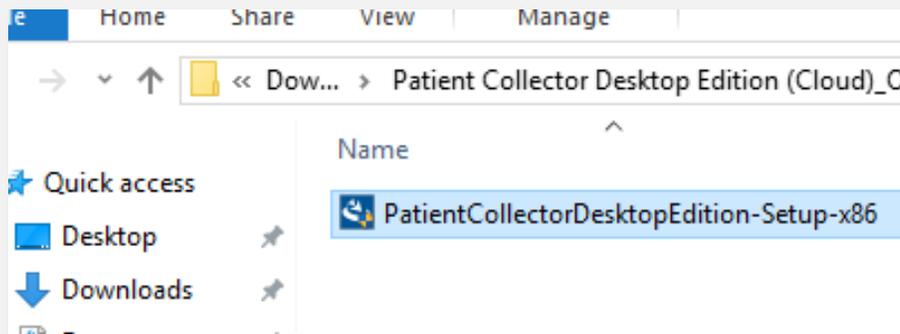


Extract both downloads and a new window will open with the Inuvio installers. **2**

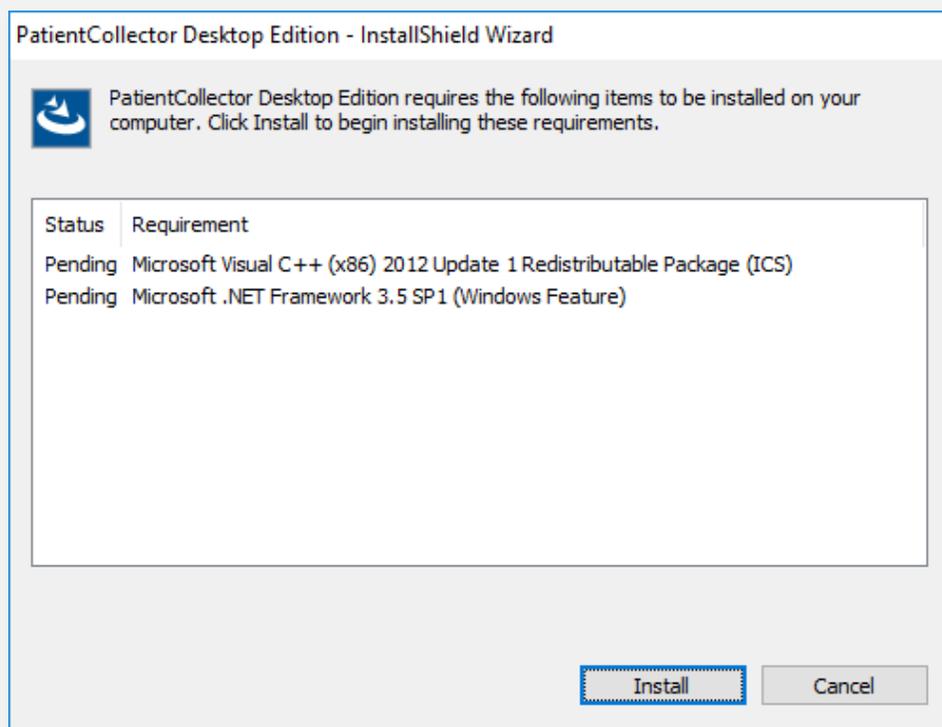


# Install PatientCollector Desktop Edition

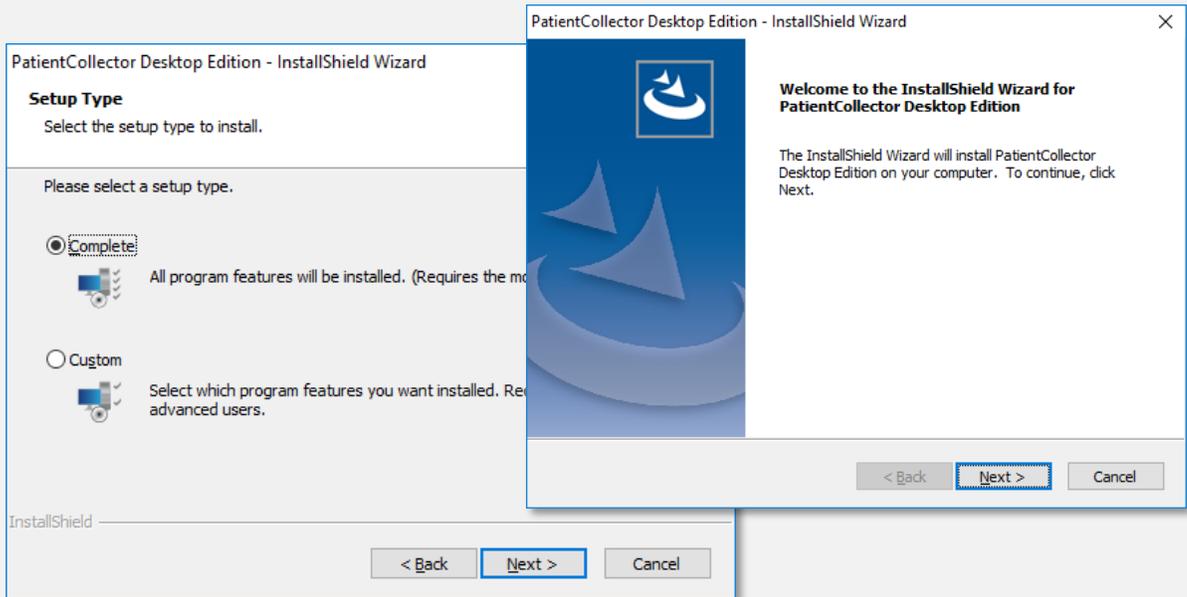
1. Double click "PatientCollectorDesktopEdition-Setup-x86.exe" to begin the setup.



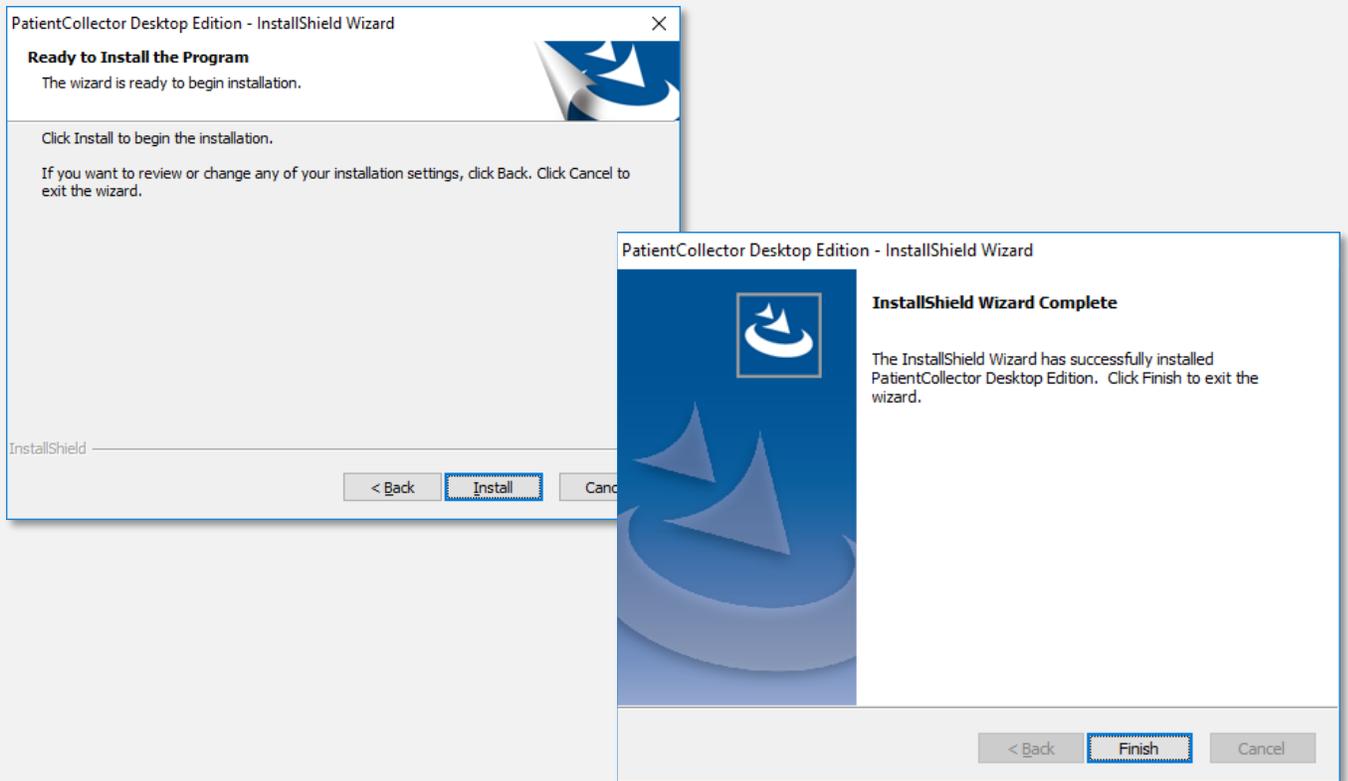
2. Click Install to begin.



3. Click Next, select “Complete” and click Next.

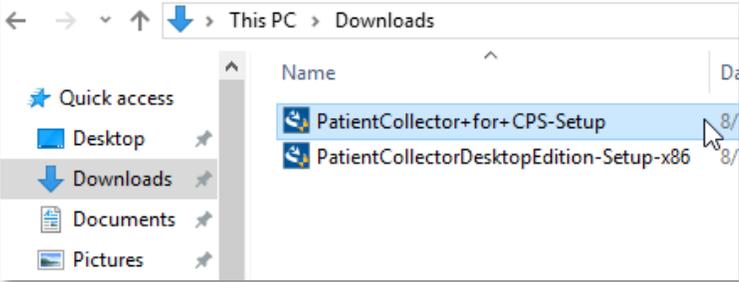


4. Click Install, wait for installation to complete, and click Finish to close the installer.

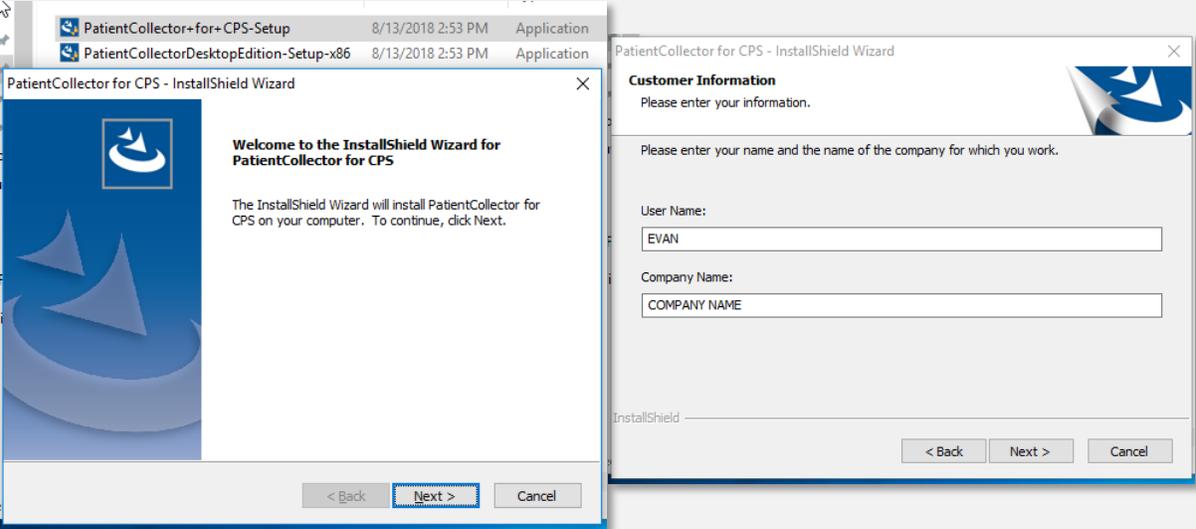


# Install PatientCollector for CPS Plugin

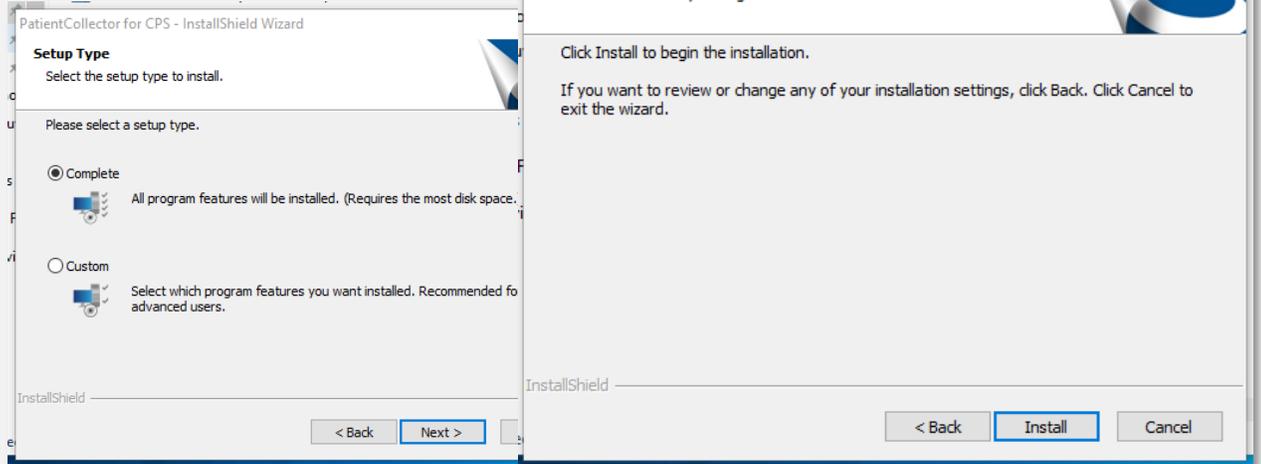
1. Double click "PatientCollector+for+CPS-Setup.exe" to begin the setup.



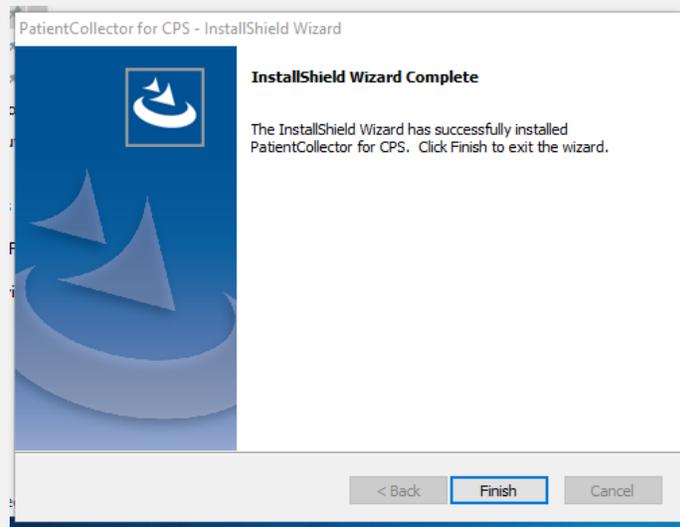
2. Click Next and enter the name and company name.



3. Select “Complete”, click Next and then click Install.



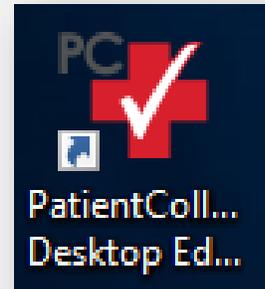
4. Click Finish to complete the install.



5. The next steps are to configure CPS. Otherwise, go to page 20 to learn how to import a new patient or page 25 to modify an existing patient’s profile.

## Start PCDE & License Authentication

1. From the Desktop, double click  
"PatientCollector" to start the program.



2. Copy and Paste the Product Code into the first cell. (Please see page 8 to find the code)

Inuvio Application Product Code Entry

Please enter your product code to continue

[ ] - [ ] - [ ] - [ ] - [ ] - [ ] - [ ] - [ ]

Cancel Ok

The image shows a Windows-style dialog box titled "Inuvio Application Product Code Entry". The dialog has a title bar with standard minimize, maximize, and close buttons. The main area contains the text "Please enter your product code to continue" followed by a row of eight empty rectangular input boxes, each separated by a hyphen. At the bottom right, there are two buttons labeled "Cancel" and "Ok".

Inuvio Application Product Code Entry

Please enter your product code to continue

ABC1 - DEF2 - GHI4 - JKL5 - MN06 - PQR7 - STU8 - VWX8

Cancel Ok

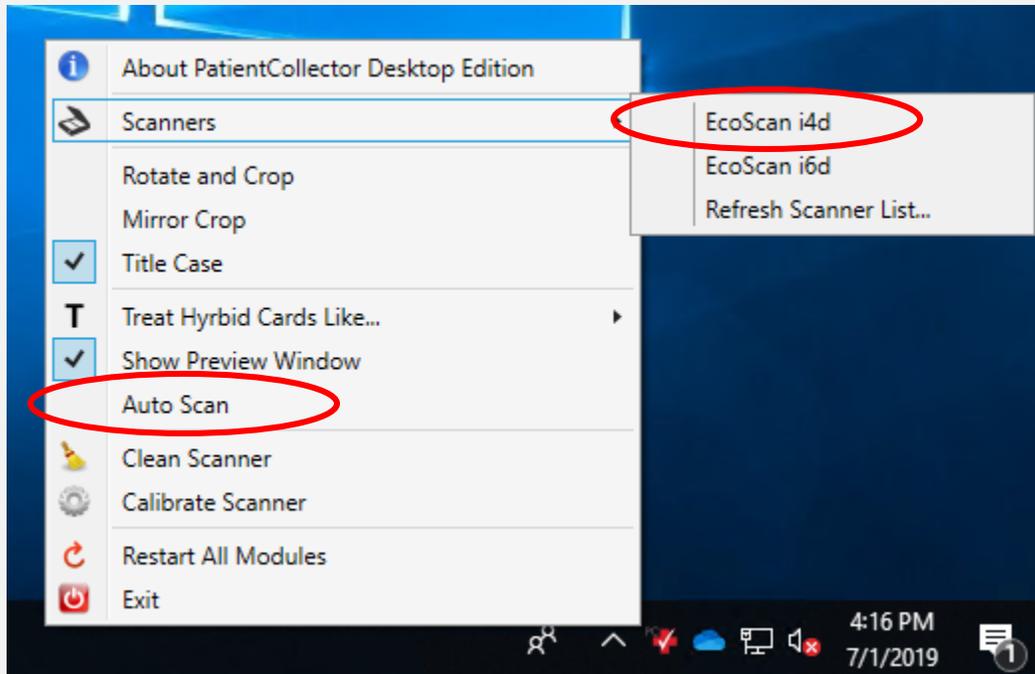
The image shows the same dialog box as above, but now the input boxes are filled with the alphanumeric string "ABC1 - DEF2 - GHI4 - JKL5 - MN06 - PQR7 - STU8 - VWX8". The "Cancel" and "Ok" buttons remain at the bottom right.

3. Click Ok

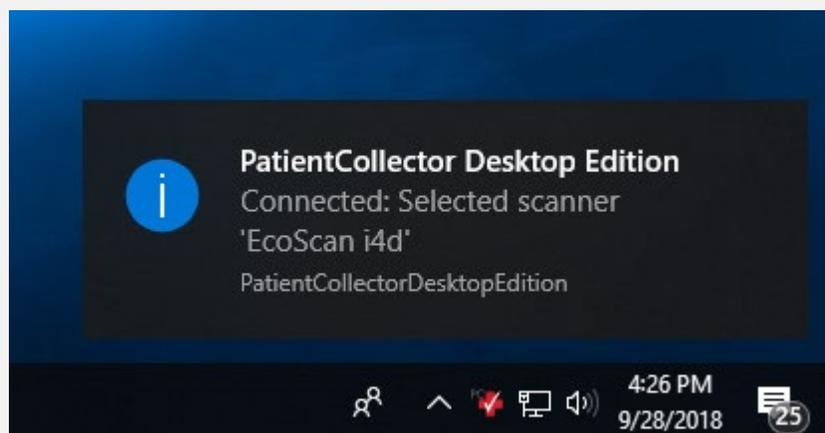


## Selecting a Scanner

1. Right-Click on the PatientCollector System Tray Icon and select your twain compatible scanner and also select “Auto Scan”.



2. PatientCollector will notify you that the scanner is selected and ready to scan!

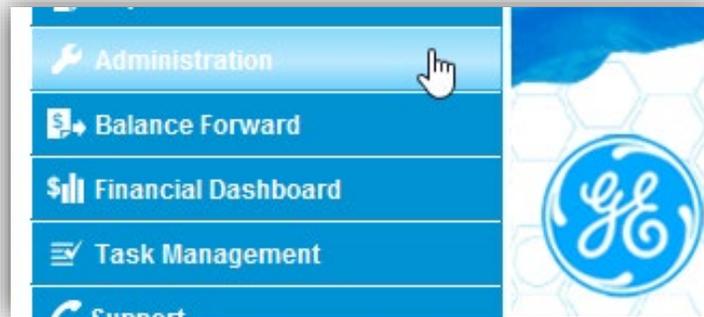


3. You can now configure Centricity. Please see page 17.

## Step 2: Configure Centricity Master Patient Index

To enable the PatientCollector for CPS plugin, please follow the steps below.

1. Open the CPS Client app and go to “Administration”



2. At the top menu options, click on EDI→Plugins and navigate to the “Master Patient Index” Tab

A composite screenshot showing the navigation path. The top part shows the 'EDI' menu with a sub-menu open containing 'Clearinghouses' and 'Plug-Ins'. An arrow points from the 'Plug-Ins' option to the 'Plug-ins' window below. The 'Plug-ins' window has several tabs: Claim File Creators, Claim Status File Creators, Eligibility File Creators, Statement File Creators, File Processors, File Transmitters, Approval, Master Patient Index, Case, and Report Runtime. The 'Master Patient Index' tab is selected. It contains a table with columns: Name, Import Prog ID, Export Prog ID, Settings Prog ID, and Inactive. The table has two rows: 'GEMSMPI Plugin' and 'PatientCollector for'. A 'Modify Master Patient Index' dialog box is open over the table, showing the 'Name' field set to 'PatientCollector for CPS' and the 'Import Plug-In' section with 'Prog ID' set to 'ICSMPICom2010.ICSMPIImport'.

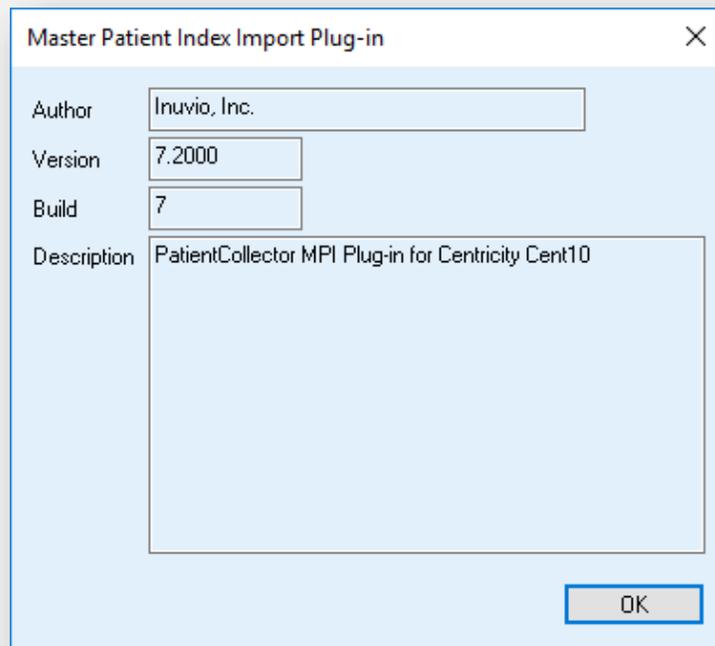
Name	Import Prog ID	Export Prog ID	Settings Prog ID	Inactive
GEMSMPI Plugin	GEMSMPI90.Import	GEMSMPI90.Export	GEMSMPI90.Settings	No
PatientCollector for	ICSMPICom2010.K			No



3. Enter the name of the plugin and Prog ID *exactly* as shown below.

<i>Name:</i>	PatientCollector for CPS
<i>Prog ID:</i>	ICSMPICom2010.ICSMPIImport

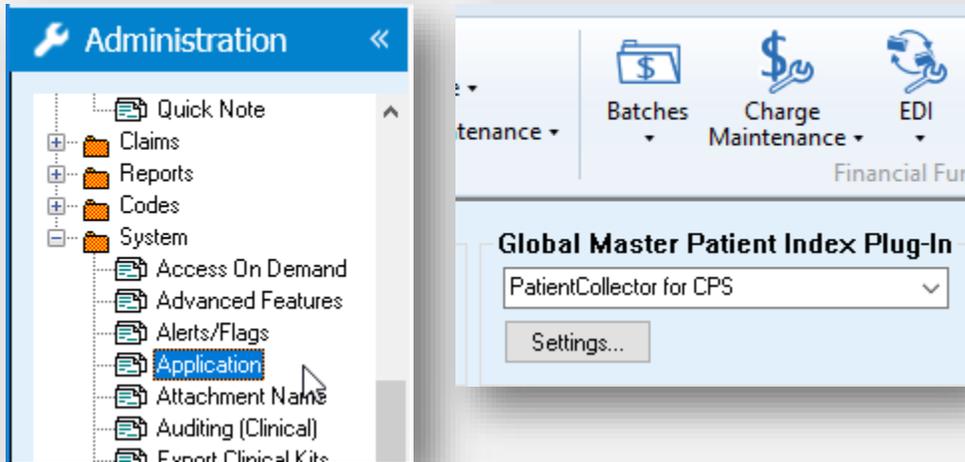
4. Click on “About” to verify that that CPS is communicating with PatientCollector for CPS.



5. Save and Exit out of CPS and log back into CPS for the changes to take effect.
6. Go back to “Administration’



7. At the left-hand pane, navigate to System→Application. Click on the “Global Master Patient Index Plug-In” drop down menu and select the “PatientCollector for CPS” dropdown option.



8. Click “Save” in the Administration window. You’re now ready to begin importing and modifying patient profiles!

## Step 3: Scanning in Centricity

### Scan A New Patient in Centricity

1. Go to Registration and click “Import”

Find Patient

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Name  SSN

Provider  Medical Rec.

Facility  Date of Birth

Guarantor  Phone

Insured ID  Bill Code

External ID  Location

Status

Search

Clear

Import

No Patients Meet The Search Criteria

New Delete... Merge Import OK Cancel



2. The PatientCollector window opens and you're ready to scan demographics and insurance cards.

PatientCollector Desktop Edition (Inuvio Card Input)

New Patient

Allocation Set Financial Class

Patient Primary Insurance Secondary Insurance Tertiary Insurance Quaternary Insurance Guarantor

Patient Demographics

Card Image Upload Images

PC

First Name DOB

Middle Name Gender

Last Name

Suffix

Address Line 1 State

Address Line 2 Zip Code

City

Copy Address From Guarantor »

Save Cancel  I have verified the data before saving  Only update images  Update face image Scan

3. Scan a card with your TWAIN compliant scanner. It can be scanned horizontally, vertically, upside down, or right side up. PatientCollector will automatically start the scan and process the images.



4. PatientCollector extracts the data from the images and places the results in the fields below. **Always verify the that all the information is correct.**

PatientCollector Desktop Edition (Inuvio Card Input)

New Patient

Allocation Set Financial Class

Patient Primary Insurance Secondary Insurance Tertiary Insurance Quaternary Insurance Guarantor

Patient Demographics : All

Card Image Upload Images

**PC**

**First Name** DOB  
Debby 12/28/1960

**Middle Name** Gender  
Female

**Last Name**  
Sample

Suffix

**Address Line 1** State  
1 Blue Ridge Commons Nebraska

**Address Line 2** Zip Code  
79306

**City**  
Hastings

Copy Address From Guarantor >

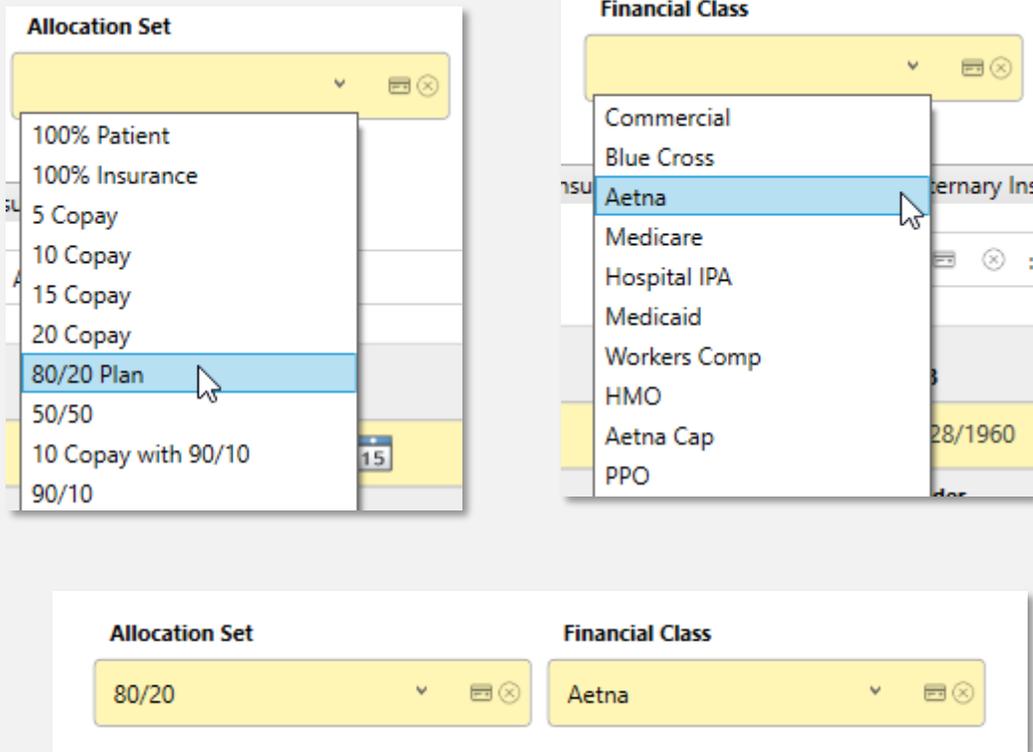
Save Cancel  I have verified the data before saving  
 Only update images  
 Update face image

Scan

Detected Driver's License



5. Select the Financial Class and Allocation Sets for the patient.



6. If all the information is accurate, select "I have verified the data before saving" and click Save.



7. Verify that all the information has transferred to the patient's profile in CPS.

Patient	Guarantor	Additional	Insurance	Contacts	Appointments	Financial	Payment Plan	Historical D
Title:	First Name:	Middle Name:	*Last Name:	Suffix:	Preferred:	<input type="checkbox"/> Sensitive Patient		
	Debby		Sample		Debby	No users denied access		
*Birth Date:	12/28/1960	Birth Time:	M	<input type="checkbox"/> Patient Same As Guarantor	Marital Status:	User Specific Chart Access...		
Age:	57 Years	Sex:	Female	SSN:	- -	*Patient Status:		
Addresses	Address: 1 Blue Ridge Commons			Patient ID:	769	Active		
<input checked="" type="radio"/> Primary <input type="radio"/> Alternate <input type="button" value="Swap"/>	City/State: Hastings NE	ZipCode:	79306	MRN:		Date of Death:		
County:		Address Type:		Resp. Provider:		/ /		
Country:				Referring:				
Subdivision:				Primary Care:		<input type="button" value="Get Photo"/> <input type="button" value="Remove Photo"/>		
Phone:	( ) - [ ]			*Home Location:	MHS			
	( ) - [ ]			Facility:				
	( ) - [ ]			Language:				
Email:				Race:	<input type="checkbox"/> Asian <input type="checkbox"/> Chinese <input type="checkbox"/> Other			
				Items selected:	0			

8. Complete

# Add Card Images or Modify an Existing Patient's Profile (Demographics and Insurance)

Below is an example of an existing patient profile whose ID and insurance information needs to be added. As you can see, no address, photo or insurance policies are populated. We will use PatientCollector to scan in the card images and automatically place the data into the patient's profile.

The screenshot shows a patient profile form with the following fields and values:

- Tabbed Interface:** Patient (selected), Guarantor, Additional, Insurance, Contacts, Appointments, Financial, Payment Plan, Historical Data.
- Name:** Title: [ ], First Name: David, Middle Name: [ ], Last Name: Sample, Suffix: [ ], Preferred: David
- Birth Information:** Birth Date: 02/13/1918, Birth Time: : M, Age: 100 Years, Sex: [ ], Marital Status: [ ], Patient Same As Guarantor: [ ]
- Addresses:** Primary (selected), Alternate, Swap. Address: [ ], City/State: [ ], ZipCode: [ ], Country: [ ], Subdivision: [ ]
- Phone:** Three phone number fields with area codes and extensions.
- Insurance/ID:** SSN: [ ], Patient ID: 770, MRN: [ ], Resp. Provider: [ ], Referring: [ ], Primary Care: [ ], Home Location: MHS, Facility: [ ], Language: [ ], Race: [ ], Ethnicity: [ ]
- Other Fields:** Sensitive Patient: [ ], No users denied access, User Specific Chart Access..., Patient Status: Active, Date of Death: [ ], Get Photo, Remove Photo



1. Go to Registration and search for the patient; double click on the patient's name.

Name	ID	SSN	DOB	Address
Sample, David	770		02/13/1918	
Sample, Debby	769		12/28/1960	

2. Select "Yes" to open the PatientCollector.

Would you like to use PatientCollector to edit the patient record?

No, never use PatientCollector           

Clicking "No" will close the box and open the existing patient's CPS profile.

This checkbox will disable the entire plugin altogether. For more info, please go to **Page 35 ...Disable/Re-enable CPS**



3. The PatientCollector window opens. Below, you can see that only the name and DOB fields are populated, just like the patient's CPS profile.

PC David Sample Allocation Set Financial Class

Patient Primary Insurance Secondary Insurance Tertiary Insurance Quaternary Insurance Guarantor

Patient Demographics Card Image Upload Images Remove Images

PC ✓

First Name David DOB 2/13/1918

Middle Name

Last Name Sample

Suffix

Gender

Address Line 1 State

Address Line 2 Zip Code

City

Copy Address From Guarantor »

Save Cancel  I have verified the data before saving  Only update images  Update face image Scan

4. Insert the patient's Driver's License into the scanner. The scan will start automatically.



5. PatientCollector processes the Driver's License images and extracts the data, placing it into the fields as seen below.

The screenshot shows the PatientCollector Desktop Edition interface. The patient's name is David Sample. The interface includes tabs for Patient, Primary Insurance, Secondary Insurance, Tertiary Insurance, Quaternary Insurance, and Guarantor. The Patient Demographics section contains fields for First Name (David), Middle Name (F), Last Name (Sample), Suffix, DOB (2/13/1918), Gender (Male), Address Line 1 (123 Highland Ave), Address Line 2, City (Wilkes Barre), State (Pennsylvania), and Zip Code (00000). A Card Image section shows a scanned Pennsylvania Driver's License for David F. Sample, including details like No. 99 900 104, DOB 02/13/1918, Sex M, Eyes GN, Height 5'07", and Expiry 10/31/2009. The license also indicates he is an ORGAN DONOR. A 'Scan' button is visible at the bottom right of the interface.

**Please verify that all the data is correct.**

6. Next, scan in an insurance card to add it to the patient's profile. When prompted, choose where the insurance information should be saved. We will click on "Primary Insurance" for this example.

The dialog box is titled "Where should the data go?" and asks "Where would you like to put the data?". It features five buttons: Primary Insurance, Secondary Insurance, Tertiary Insurance, Quaternary Insurance, and Cancel. The Primary Insurance button is highlighted, indicating it is the selected option.



7. PatientCollector extracts the information from the images and populates the fields as seen below.

The screenshot displays the 'Primary Insurance' form with the following populated fields:

- First Name:** John
- Middle Name:** L
- Last Name:** Smith
- DOB:** Select a date (calendar icon)
- Id Number:** 1EG4TE5MK72
- Group Number:** (empty)
- Effective Date:** Select a date (calendar icon)
- Relation to Insured:** (dropdown menu)
- Carrier:** (dropdown menu) with a 'Choose Carrier' button

Radio buttons for relationship are:  Same as Patient,  Same as Guarantor,  Other.

The 'Card Image' section shows a Medicare Health Insurance card for JOHN L SMITH with Medicare Number 1EG4-TE5-MK72. Coverage starts for HOSPITAL (PART A) and MEDICAL (PART B) on 03-01-2016.

8. Financial Class and Allocation Set are required and may have default values, but also can be adjusted if needed.

The screenshot shows two dropdown menus:

- Allocation Set:** Medicare-80/20 labs 100%
- Financial Class:** Medicare

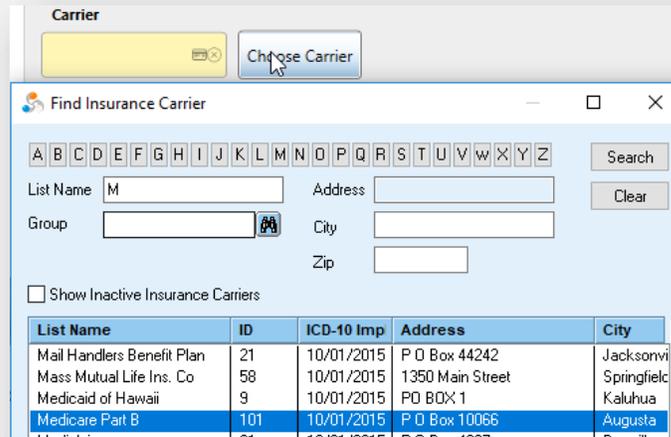
9. Choose the relation in the "Relation to Insured" dropdown list. We will choose "Other" for this example.

The screenshot shows the 'Relation to Insured' dropdown menu with the following options:

- Child
- Other** (highlighted)
- Self
- Spouse

A blue arrow points downwards from the 'Other' option.

10. Click on “Choose Carrier” and select the correct package.



11. Optionally scan more insurance cards and guarantor information (only if needed).

12. Once you’ve verified the data is correct, select “I have verified the data before saving” and click “Save” to save the new information to CPS.



Note: “Only update images” will update *just the images*. No data extraction is done.

13. The patient’s CPS profile is updated with all the information extracted by PatientCollector. In the Patient Tab, we can see that the Address, Middle Name, City, State, Zip and photo have been updated.



14. In the insurance tab, all the data is visible in the patient's profile.

Insurance Carrier	Type	Carrier Alert Notes	Carrier Notes	Eligibility	Verified By	Verified
<input type="checkbox"/> Medicare Part B				Not Verified		

Allocation Set: Medicare-80/20 labs 100% Financial Class: Medicare

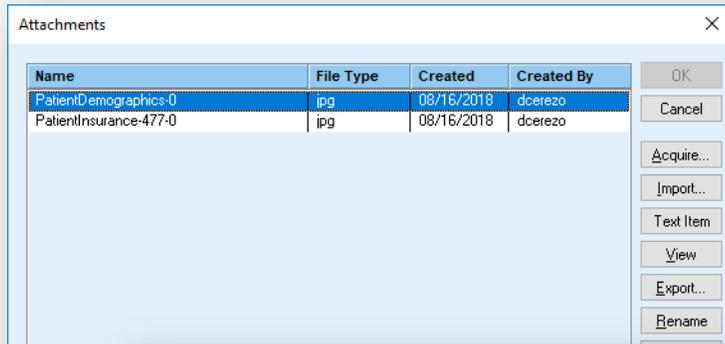
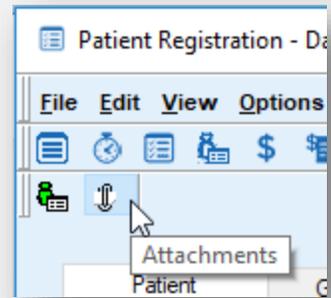
Insured Person Information  
Title: First: David Middle: F Last: Sample Suffix:  
Birthdate: 02/13/1918  
Address: 123 Highland Ave  
City/State: Wilkes Barre PA 00000  
Country: Subdivision:  
Phone: ( ) - [ ]  
SSN: - - Sex: Male

Insured person:  Patient  Guarantor  Other  
Insured ID: 1EG4TE5MK72  
Other Insured ID:  
Policy Group:  
Group Name:  
Medicare Secondary:  
Insurance Eligibility

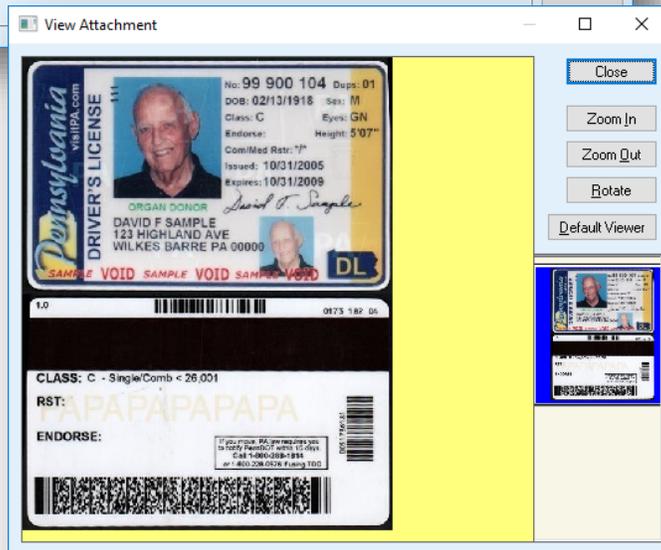
Note: If guarantor information is added, it is visible in the guarantor tab.



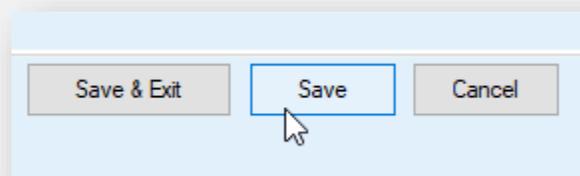
15. To view the front/back of the Driver's License and/or Insurance cards, please go to the Attachments icon at the top left and the Attachments box opens.



Double click on either PatientDemographic or PatientInsurance and the front/back of the card appears.



16. Save all the information. That's all it takes!



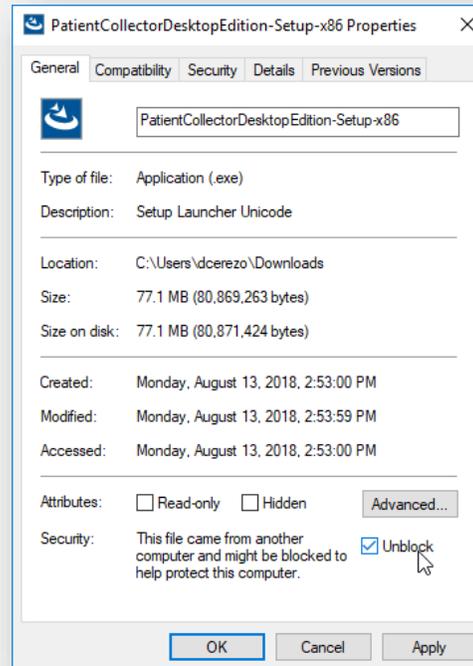
# Troubleshooting Unable to Install

## Issue:

I'm unable to install PatientCollector and unable to disable SmartScreen in Windows. What should I do?

## Solution:

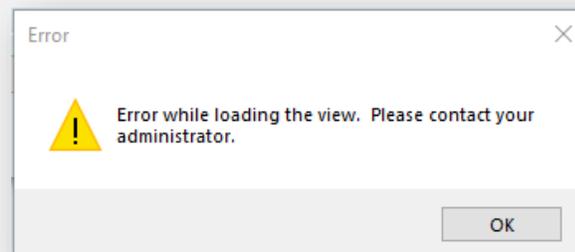
1. Please right click the installer
2. Go to Properties
3. Check "Unblock"
4. Apply and OK
5. Double click the installer to start the installation.



# Error Loading the Patient Profile

## Issue:

The this error appears when attempting to load the PatientCollector window. "Error while loading the view. Please contact your administrator."



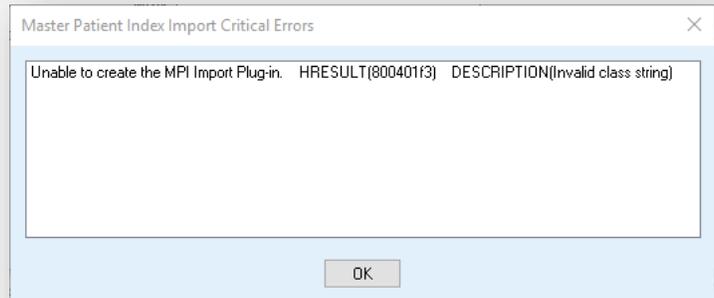
## Solution:

1. Please make sure that the *PatientCollector Desktop Edition* software is running and loaded in the system tray
2. If *PatientCollector Desktop Edition* is running and the error still occurs, please restart your computer.
3. If the error continues to occur, please contact Inuvio Support.

# Disable/Re-enable CPS PatientCollector Plugin

## Issue:

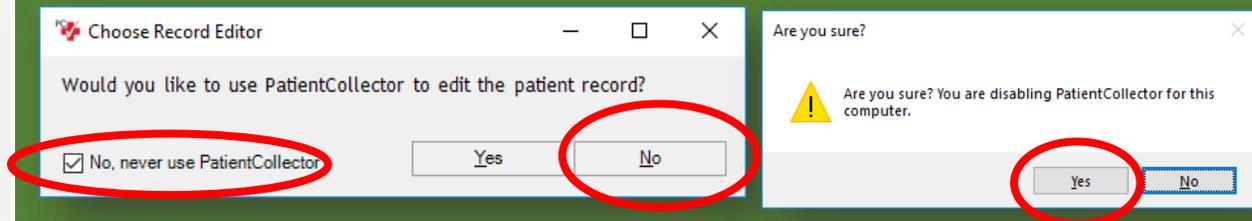
“Unable to create the MPI Import Plug-in” when loading a patient. How do we disable PatientCollector for CPS on computers that do not need to run it?



## Solution:

To disable the MPI error message on certain computers, please follow the steps below.

1. Install the PatientCollector for CPS Plugin (please see page 12)
2. Open CPS → Go to Registration → Click on “Import” at the bottom of the window.
3. The “Choose Record Editor” box opens.
4. Select “No, never use PatientCollector” and click No.
5. Are you sure? Click Yes.



To re-enable the plugin, follow the steps below.

1. Go to C:\ProgramData\Inuvio\PatientCollector for CPS
2. Open “PatientCollectorSettings.v2” with notepad
3. Change “<StubMode>1</StubMode>” to “<StubMode>0</StubMode>”
4. Save changes and start scanning in CPS

To disable the PatientCollector MPI plugin for *all* computers, follow the steps below.

1. Open CPS
2. Go to “Administration”
3. On the left hand pane, go to “System” → “Application”
4. On the “Global Master Patient Index Plug-In” dropdown menu, select “None”
5. Click Save

# Antivirus and Browser Whitelist Exceptions

## Issue:

There are instances of antivirus programs that can cause slowness and/or disruption preventing PatientCollectors from functioning correctly.

## Solution:

Add the following to the exception list of your preferred antivirus program.

Browser exceptions:

- <https://micro-prod-v1.scancloud.inuvio.com>
- <https://api-v2.scancloud.inuvio.com>

Folder Path Exceptions:

- C:\ProgramData\Inuvio\*
- C:\Program Files (x86)\Inuvio\*