

# Scanning Insurance Card

*Hosted User*

Scanning card: Scan both sides of the card even if it doesn't appear anything is useful on the opposite side. Two scans are required. Wait 30 secs before uploading.

From Patient Activity screen, choose Insurance Plans tab. Click on View Card.

The screenshot shows a software interface for managing insurance plans. At the top, the account number is 10154 and the patient is Danielle Test. The 'Insurance Plans' tab is selected and circled in red. Below the tabs, there are fields for Insurance (BC), Insured (Dan), Order (Primary), ID (YND200123456), and a checked 'Assigned' box. A 'View Card' button is highlighted with a red box. The interface is divided into 'Insured Party Data' and 'Plan Info' sections. The 'Insured Party Data' section includes fields for First Name (Dan), Last Name (Test), Address (1 Main St), City (Spencerport), State (NY), Zip (14559), Birth Date (01/02/1970), SSN (- -), Sex (Male), Relation (Father), Insured's ID, Effective date (//), and Expired date (//). The 'Plan Info' section includes Group #, Plan Name, Formulary (Plan Default), Employer, and Co-Payment (0.00). There are also checkboxes for 'Plan is for this family member only' and 'Plan is for selected family members'. At the bottom, there are 'Save', 'Cancel', and 'Delete Plan' buttons.

Make sure insurance chosen in system matches what is on the card; for family billing clients, be sure the correct patient is chosen. Click on Import.

Image of card will be downloaded from the cloud. Hit Exit. The image will appear next time you View Card.

The screenshot shows a dialog box titled 'Insurance Card - Blue Choice'. It has a blue title bar with a close button (X). Inside the dialog, there are two buttons: 'Import' and 'Delete'. The 'Import' button is circled in red. At the bottom of the dialog, there is an 'Exit' button and a search icon.