

Scanning and Uploading Documents into SmartCare

Hard-copy documents that are to be entered into the records of persons served using the Scanning feature.

Three Basic Requirements for Scanning documents:

1. Your user roll or function must have scanning privileges
2. You must either have a scanner attached to your workstation or network based.
3. You must have the **Dynamic Web TWAIN** application installed on your workstation.
 - a. If *Dynamic Web TWAIN* has **not** been installed, the **SmartCare application** will let you know by prompting you to download the application, and the quick install should look something like the following:



Figure 1 - Click Download

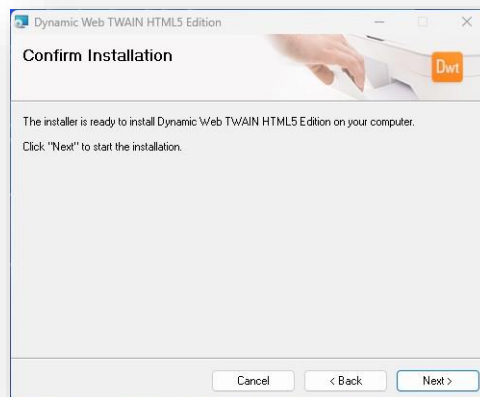


Figure 2 - Click Next

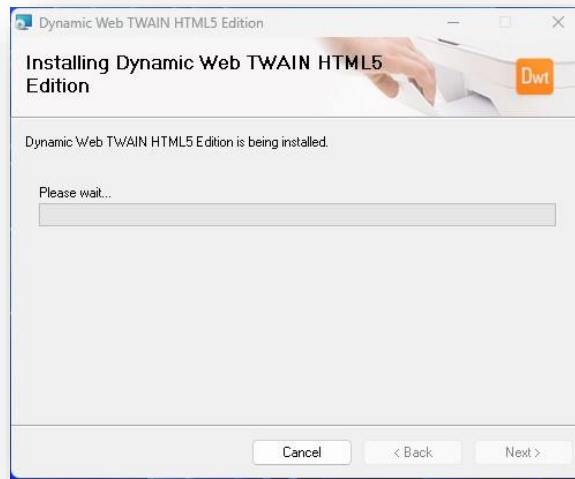


Figure 3 - Still Installing...

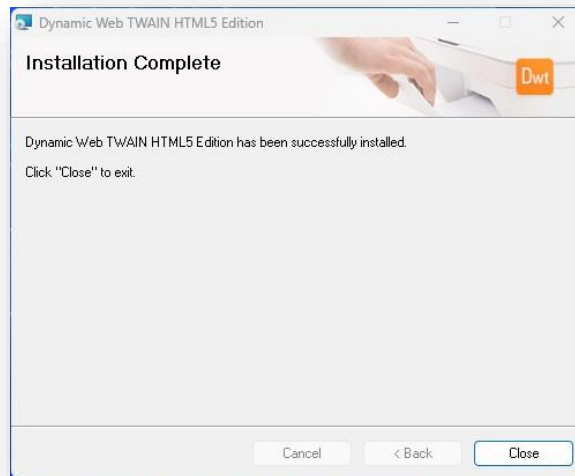


Figure 4 - Click "Close" when complete

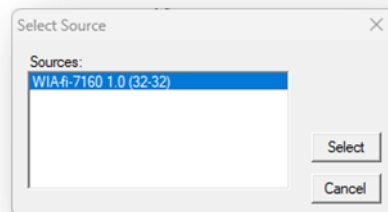


Figure 5 - Your attached scanners should appear in Sources window.

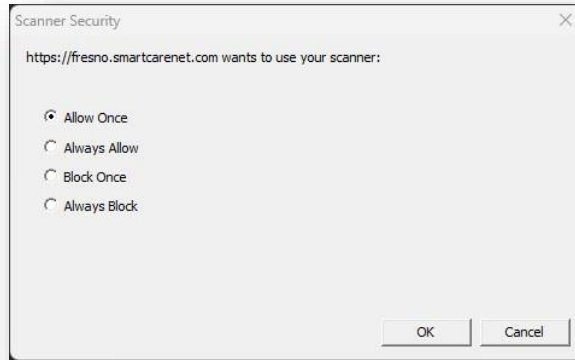


Figure 6 - Select Option

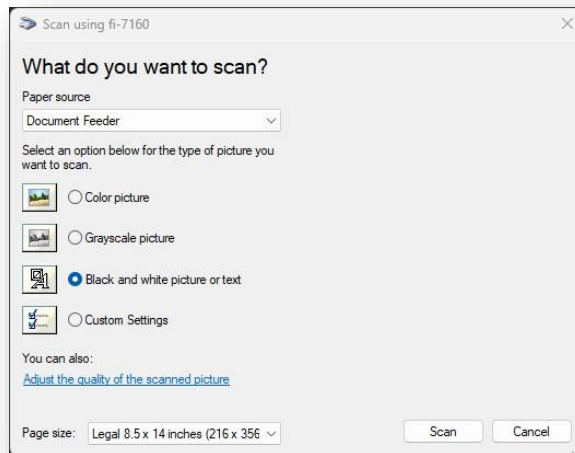


Figure 7 – Select Option

Important: System Admin access on your workstation is required for this install. Staff using County-issued equipment should contact ISD Pontiac for assistance. Those who are not using County issued-should contact their IT Administrator(s).

4. After **Dynamic Web TWAIN** has been downloaded and installed, you should now be able to use your attached scanner.

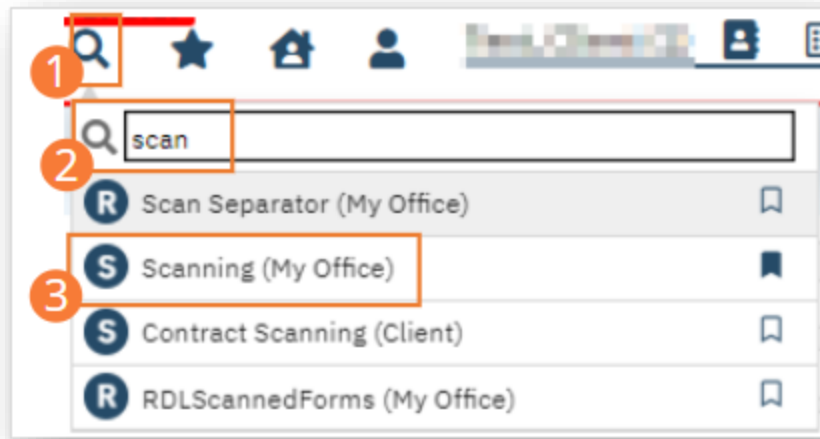


Figure 8 - Search Bar

5. Document Scanning

- a. On the SmartCare main page, 1) click the **search** icon bar (fig. 8), 2) type “Scan” into the search, 3) then select the menu item: **Scanning (My Office)**.

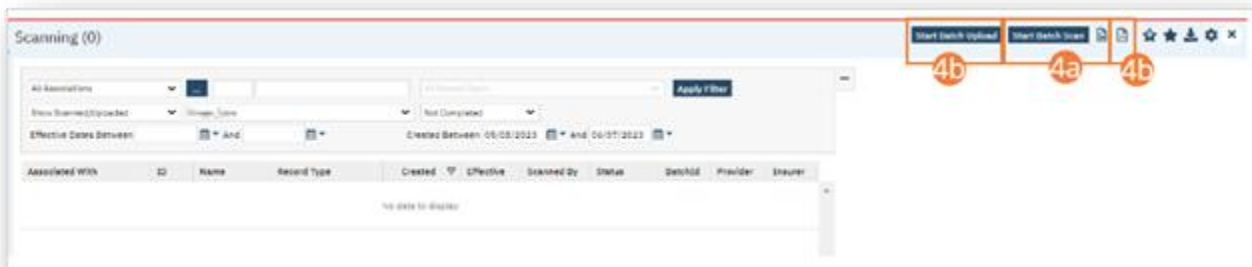


Figure 9 - Scanning Page

- b. There are four options to choose from after the Scanning page opens from left to right above: **Batch Upload** bar (fig. 9, 4b), **Batch Scan** bar (fig.9, 4a), **Scan** icon (fig. 9, 4a), and **Upload** icon (fig. 9, 4b).

The **Batch Upload** and **Batch** functions are for **.PDF** documents **ONLY**. Documents of any other type must first be converted before being uploaded or imported into SmartCare. Converting documents to .pdf can easily be done in most applications by using the “Save as .pdf” function, or by printing the document to a .pdf file.

The **Scan** and **Batch Scan** functions are used to convert hard copy (paper) documents into electronic images, which can then be imported into SmartCare.

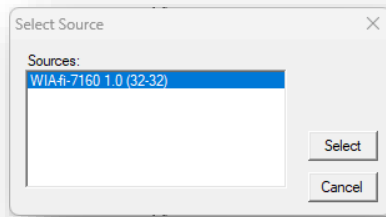


Figure 10 - Select Source Popup

- c. After clicking the “**Scan**” icon (fig. 9, 4b) the *Scanned Medical Record Detail* page opens, and you may be prompted to select your scanner (fig. 10), and depending on the specific requirements of your hardware, you may need to make additional selections.

Note: Please follow the user guides and instructions from the equipment manufacturer and your organization for proper operation of your specific scanning hardware.



Figure 11 - Scanned Medical Records Detail Page

- d. After following the prompts, your scanner should begin initializing, and the scanned image of your document will display in the center pane after the document file is successfully acquired.
- e. Select record **Category Option** (fig. 11, 5c) from the top left dropdown.
- f. Click the more button (‘...’ fig. 11, 5d) to perform a client search using the steps found under [How to Search for a Client](#). This step will be skipped, and a client will be pre-selected, if you opened *Scanning (My Office)* with an active client. In this case, select the ‘...’ button to change active clients.
- g. Select and enter **Record Type** (fig.11, 5e) from the dropdown.
- h. Select and enter **Effective** date (fig.11, 5f).
- i. Enter a **Description** (fig.11, 5g) into the text field.
- j. Click **Save** (fig.11, 5h)

6. Document Imports/Uploads

- a. To import or upload a document, select the **Upload icon** (fig 9, 4a).
- b. When the Upload pop-up opens, click **Select** and locate the document in Explorer.
- c. After clicking **Upload**, the document should display in the center pane as in paragraph 6c above.
- d. Select a record **Category Option** from the dropdown (fig.11, 5c)
- e. Click the more button ('...' fig.11, 5d) to perform a client search using the steps found under [How to Search for a Client.](#) This step will be skipped, and a client will be pre-selected, if you opened Scanning (My Office) with an active client. In this case, select the '...' button to change active clients.
- f. Select and enter **Record Type** (fig.11, 5e) from the dropdown.
- g. Select and enter **Effective** date (fig.11, 5f).
- h. Enter a **Description** (5g) into the text field.
- i. Click **Save** (fig.11, 5h)

7. Batch Scanning

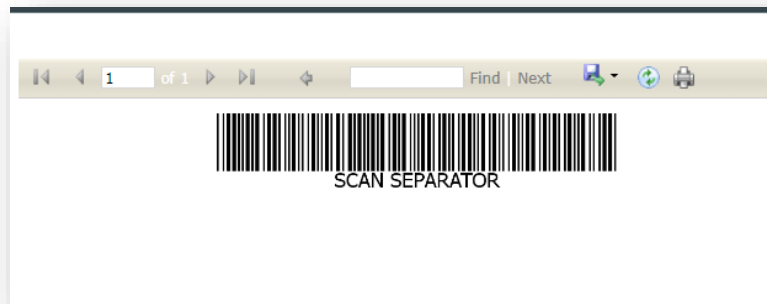


Figure 12 - Scan Separator

- a. Before selecting **Batch Scan** (fig.9, 4b) you must print one or more **Scan Separators** from the *Scan Separator (My Office)* page, to place between each document to signal to the system that they are separate.

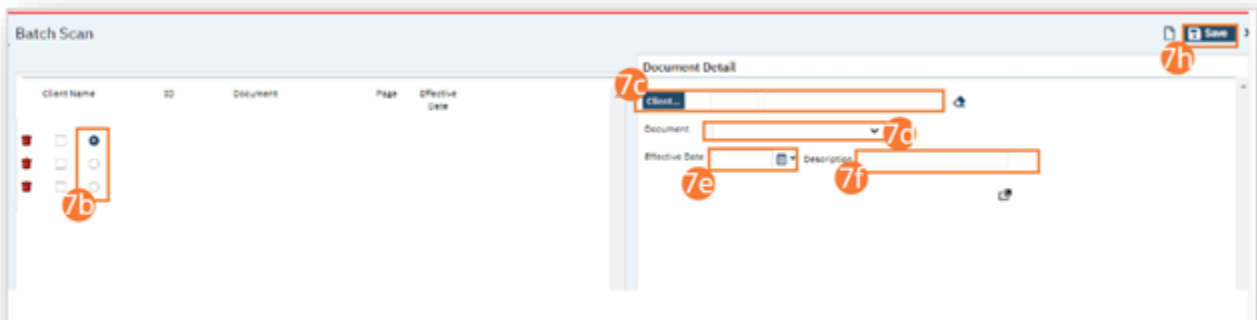


Figure 13 - Batch Scan Page

- b. After selecting **Batch Scan**, the Batch Scan page will open (fig.12).
- c. After acquiring the scanned documents, ensure that a Scan Separator is placed between each set of documents.

- d. Your scanned documents will be listed in the left pane (fig.13, 7b). Select a radio button to display the document.
- e. Click the **Client** button (fig.13, 7c) to perform a client search using the steps found under [General Client Search](#).
- f. Select **Document** type (fig. 13, 7d) from the dropdown.
- g. Set the **Effective Date** (fig. 13, 7e).
- h. Enter the **Description** (fig. 13, 7f) into the text field.
- i. Repeat steps **8d-8h** in this paragraph for each of the scanned documents.
- j. Click **Save**.

8. Batch Uploads

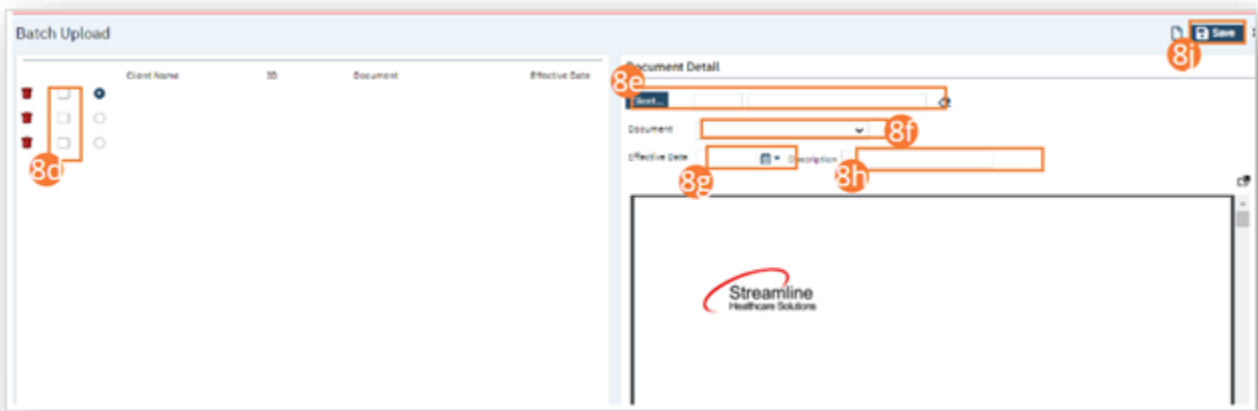


Figure 14 - Batch Upload Page

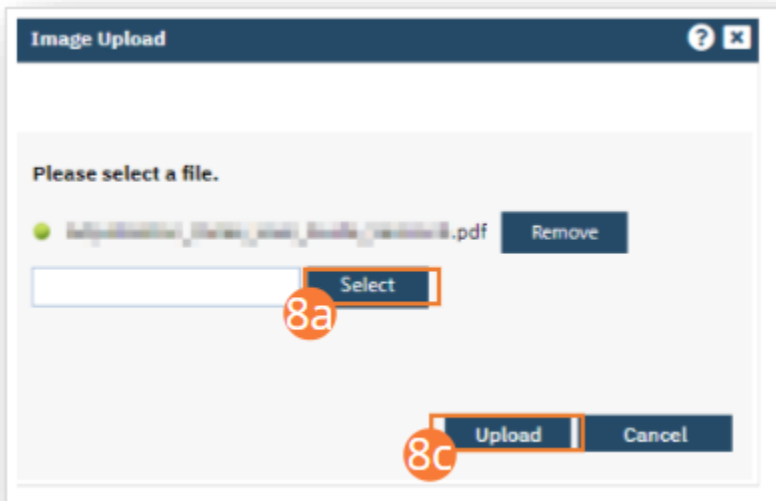


Figure 15 - Image Upload Pop-up

- a. After selecting **Batch Upload**, the *Batch Upload* window (fig.14) will open overlaid by the Batch Image Upload pop-up (fig.15)

- b. Click **Select** (fig.15, 8a) and locate the documents in Explorer. The Batch Upload function supports multiple document selections.
- c. Click **Upload** (fig.14, 8c).
- d. When the upload is complete, your documents will be listed in the left pane (fig. 11, 7b). elect a radio button to display the document.
- e. Click the **Client** button (fig.14, 8e) to perform a client search using the steps found under [General Client Search](#).
- f. Select **Document** type (fig.14, 8f) from the dropdown.
- g. Set the **Effective Date** (fig.14, 8g).
- h. Enter the **Description** (fig.14, 8f) into the text field.
- i. Repeat **steps 9d-9h** in this paragraph for each of the scanned documents.
- j. Click **Save**.

9. Review and Verification

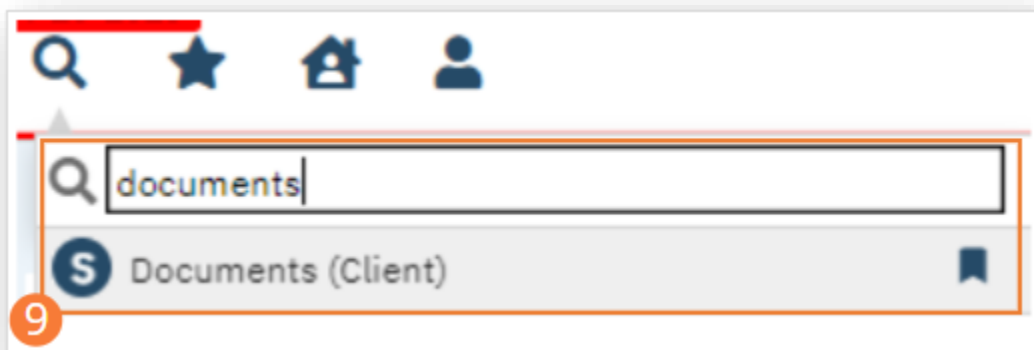


Figure 16 – Search Bar

- a. To verify and your imports, return to the SmartCare search function, 1) click the search icon, 2) enter “**Documents**” into the search bar, 3) then select the menu item: **Documents (Client)**.

Document/Description	Group Name	Effective	Status	Vets	Due Date	Author	To Co Sign	Others to Sign	Shared	Associated Documents	Attachment(s)
MSA Document		04/01/2023	Completed	1		MSA, MSU			Yes	Add	
UNCAF Financial Assessment		04/04/2023	Signed	1		MSA, MSU		MS, Client	Yes	Add	
Client Release		04/04/2023	Signed	1		MSA, MSU			Yes	Add	
CaOHS Standalone Under Disclosure		05/02/2023	In Progress	1		MSA, MSU			Yes	Add	
CaOHS Admission		05/02/2023	In Progress	1		MSA, MSU			Yes	Add	

Figure 17 - Documents Page

- b. On the *Documents* page, you can review the documents scanned and uploaded. To link associated documents, click the “**Add**” hyperlink in the “**Associated Documents**” column to upload new documents that should be associated with the selected document.

Note: The contents of the document are derived from several sources including information obtained from the Help function in the *SmartCare* application. The most updated version can be downloaded from the DBH FreshService Support Portal (<https://fresnodbh.freshservice.com/support/home>) by searching or browsing for the document title.

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