

SCANNER INTEGRATION



Crystal Practice Management will integrate with Scan Snap scanners as well as any scanner with a Twain driver. However, we have three recommended scanners that are easy to connect and use within Crystal.

Click on each scanner below to see more information about the product and access software downloads.

- [Fujitsu ScanSnap IX500](#)
- [Fujitsu ScanSnap S1300](#)
- [Xerox Documate 3125](#)

For setup instructions, click on a link below:

[TWAIN SCANNER SETUP](#)

[SCAN SNAP SETUP](#)

[TWAIN SCANNER SETUP \(CLOUD\)](#)

[SCAN SNAP SETUP \(CLOUD\)](#)



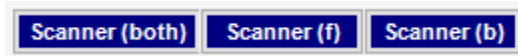
SCANNER INTEGRATION

TWAIN SCANNER SETUP INSTRUCTIONS:

1. Follow the driver install instructions that came with your scanner, if applicable.
2. Plug the scanner into your computer.
3. Go to Configuration > Scanner Options. Select “Scanner (Twain)”.
4. This will open a Select Source popup. Select your scanner from the list and click “Select” to close.

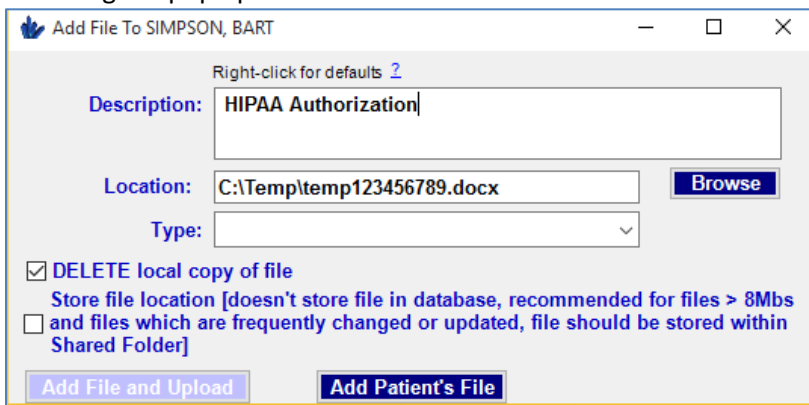
Using the Scanner:

- Make sure your scanner is turned on.
- To test insurance cards, go to Patient > Insurance. You can test with a business card or an insurance card.
- Place the card in the scanner.
- Then, click the Scanner button in Crystal (both, front, or back) to make sure it scans and drops into Crystal properly.



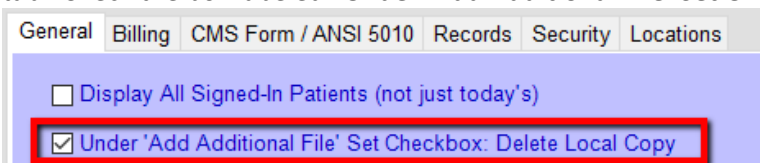
- To test documents, go to Patient > Files.
- Load a full page documents into your scanner.
- Click the “Add Scanned File” button.

You will get a pop up box like the one below.

A screenshot of a dialog box titled "Add File To SIMPSON, BART". It has a "Description:" field with "HIPAA Authorization" entered. Below it is a "Location:" field with "C:\Temp\temp123456789.docx" and a "Browse" button. There is a "Type:" dropdown menu. At the bottom, there are two checkboxes: "DELETE local copy of file" (checked) and "Store file location [doesn't store file in database, recommended for files > 8Mbs and files which are frequently changed or updated, file should be stored within Shared Folder]" (unchecked). At the very bottom are two buttons: "Add File and Upload" and "Add Patient's File".

- Enter your document name in the Description box.
- Make sure the “DELETE local copy of file” box is checked.
- Click “Add Patient’s File”.

If your “DELETE local copy of file” is not automatically checked, you can change this setting in Admin>Company>General tab. Check the box labeled “Under ‘Add Additional File’ Set Checkbox: Delete Local Copy”.

A screenshot of the "General" tab in the Admin>Company>General settings. The "Under 'Add Additional File' Set Checkbox: Delete Local Copy" checkbox is checked and highlighted with a red rectangle. Other visible settings include "Display All Signed-In Patients (not just today's)" which is unchecked.

*** You may have to adjust the scanner settings based on what you are scanning. For example, for insurance cards and IDs, you may need to select the appropriate size and select color and double sided. When scanning a document, you may select a full page size, single sided, black and white.

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FUJITSU SCAN SNAP SETUP INSTRUCTIONS:

Installing the Software:

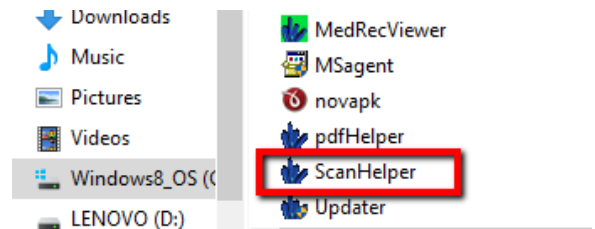
Be sure to run the software that comes with your scanner (if applicable). If you do not have the software disk, click on the scanner above to be directed to the online download page. Make sure you also have a .pdf reader installed. If you don't, you can get a free download of Adobe Reader by clicking [here](#).

Setting up the Integration:

1. In Crystal, go to Configuration > Scanner Options and make sure that **“Scanner (External App)”** is checked.
2. In Admin>Company>General tab, make sure the box is checked for **“Under ‘Add Additional File’ Set Checkbox: Delete Local Copy”**.
3. In the right corner of your toolbar, double click on the Scan Snap icon to open the Scan Snap manager.



4. Under the Profile dropdown, select **“Add Profile”**. Enter **“Documents”** and click OK.
5. Next, click on the Application tab.
Click the **“Add or Remove”** button.
Click **“Add”**.
Click **Browse**.
Browse out to **C:\Program Files (x86)\CrystalPM\ScanHelper**
Click **Open**.
Type **“CrystalPM”** in the Application Name box and click OK.

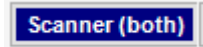


6. Now enter the following settings on each tab:
 - APPLICATION: Choose **“Crystal PM”** from the dropdown list.
 - SAVE: Leave as is.
 - SCANNING: Image quality = **normal**; Color mode= **Auto color detection**; Scanning side = **Duplex scan**
 - FILE OPTION: **PDF**
 - PAPER: Paper size =**Automatic detection**; Multifeed detection = **Check Overlapping**
 - COMPRESSION: Set to highest – 5Click Apply.
7. Repeat step 4 but name the new profile **“Insurance / ID Cards”**.
8. Now enter the following settings on each tab:
 - APPLICATION: Choose **“Crystal PM”** from the dropdown list.
 - SAVE: Leave as is.
 - SCANNING: Image quality = **normal**; Color mode= **Color**; Scanning side = **Duplex scan**
 - FILE OPTION: **JPEG**
 - PAPER: Paper size =**Automatic detection**; Multifeed detection = **none**
 - COMPRESSION: Set to highest – 5Click Apply.
9. Click OK to close.

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Using the Scanner:

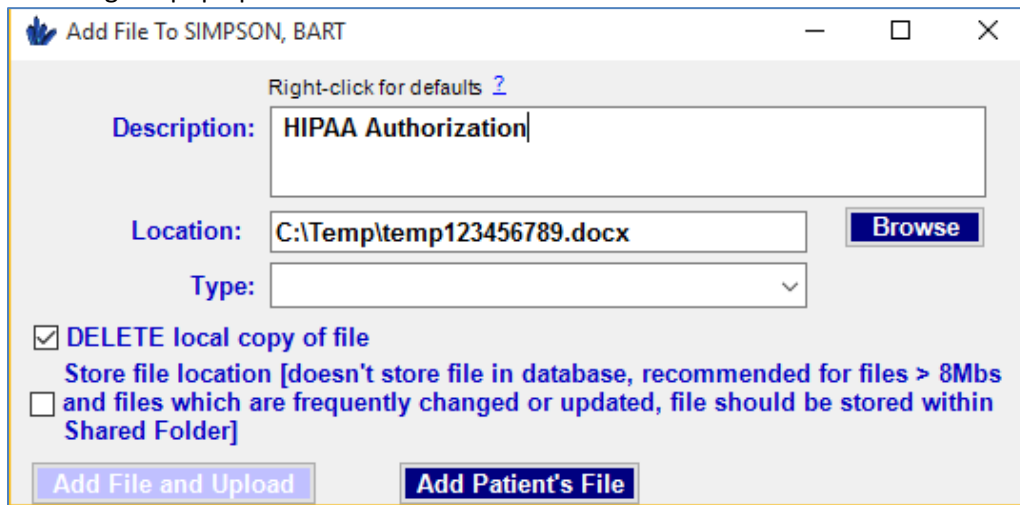
- Make sure your scanner is turned on.
- Click on the Scan Snap icon on your toolbar and select **“Insurance / ID Cards”**.
- In a test patient account, go to Patient > Insurance. You can test with a business card or an insurance card.
- Place the card in the scanner.
- Click the blue button on the ScanSnap scanner to begin the scan.
- Click the Scanner (both) button to pull the scanned image into Crystal.



You should now see both sides of the card in the patient insurance page.

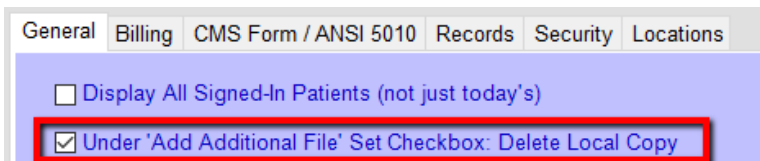
- Next, to test a scanned document, go to Patient > Files.
- Click on the Scan Snap icon on your toolbar and select **“Documents”**.
- Load a full page document into your scanner and then click the blue button on the ScanSnap scanner.
- Next, click **“Add Scanned File”** button to pull the scanned image into Crystal.

You will get a pop up box like the one below.

A screenshot of a Windows-style dialog box titled "Add File To SIMPSON, BART". The dialog has a light gray background and a blue border. At the top right are standard window controls (minimize, maximize, close). Below the title bar, there is a link "Right-click for defaults ?". The main area contains several fields: a "Description:" label followed by a text box containing "HIPAA Authorization"; a "Location:" label followed by a text box containing "C:\Temp\temp123456789.docx" and a blue "Browse" button; and a "Type:" label followed by a dropdown menu. Below these fields are two checkboxes: the first is checked and labeled "DELETE local copy of file", with a blue tooltip text "Store file location [doesn't store file in database, recommended for files > 8Mbs and files which are frequently changed or updated, file should be stored within Shared Folder]"; the second is unchecked. At the bottom are two buttons: "Add File and Upload" (light blue) and "Add Patient's File" (blue).

- Enter your document name in the Description box.
- Make sure the **“DELETE local copy of file”** box is checked.
- Click **“Add Patient’s File”**.

If your **“DELETE local copy of file”** is not automatically checked, you can change this setting in Admin>Company>General tab. Check the box labeled **“Under ‘Add Additional File’ Set Checkbox: Delete Local Copy”**.

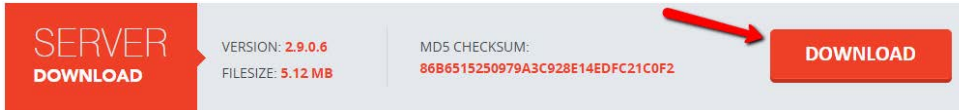
A screenshot of a web-based settings interface. At the top are several tabs: "General", "Billing", "CMS Form / ANSI 5010", "Records", "Security", and "Locations". The "General" tab is selected and highlighted in light blue. Below the tabs, there are two checkboxes. The first is unchecked and labeled "Display All Signed-In Patients (not just today's)". The second is checked and labeled "Under 'Add Additional File' Set Checkbox: Delete Local Copy", and this checkbox is highlighted with a red rectangular border.

SCANNER INTEGRATION

CLOUD BASED TWAIN SCANNER SETUP:

On the server:

- Go to www.terminalworks.com
- Click on TSSCAN; click the TRY button.
- Download and install server version



On the client's desktop:

- Go to www.terminalworks.com
- Click on TSSCAN; click the TRY button.
- Download and install server version



- Next, Follow the driver install instructions that came with your scanner, if applicable.
- Plug the scanner into your computer.
- Go to Configuration > Scanner Options. Select "TSScan".
- This will open a Select Source popup. Select your scanner from the list and click "Select" to close.

Click [here](#) for instructions on using the scanner in Crystal or see "Using the Scanner" instructions under the Twain setup.

CLOUD BASED SCAN SNAP SCANNER SETUP:

This is a more complicated setup. It is best to contact Crystal support for assistance with this setup. You will need access to both the server and client computers.