Session 3: Module 4 - Scan Documents	
FINAL	
Description	**Text**
Introduction	Welcome to Session 3, module 4 of the HuBERT On-Demand Training Sessions presented by the MN Department of Health WIC Program. This module will review Scan Documents.
Scanners	
Scan	HuBERT has the ability to scan individual documents into a participant's folder. Some of the benefits of scanning include:
	it reduces the amount of paper that has to be maintained by clinics;
	it can be used to scan forms such as medical documentation, food and formula approvals, release of information, and other forms requiring participant signatures, etc.;
	and it allows paper documentation to transfer with the participant record.
Important	The scanner should NEVER be used to scan participant's private documentation such as income or IDs.
Scan1	Scanning documents provides us with a method for maintaining all of the participant's information in the participant folder. It is NOT meant to provide another method of documenting information we already document in other ways in the system.
	By scanning paper documentation that is typically maintained outside of the system, the participant folder becomes a more robust tool and provides for a more complete transfer of information when participants transfer to other agencies.
Scan2	One scanner has been purchased for each WIC clinic site.
	They are single-page scanners since HuBERT requires each document to be scanned individually into the participant folder.
	It can scan documents up to 8 by 14 inches in size.
<clickdocimg>	In order to use the **Document Imaging** capabilities, the scanner must be physically attached to our computer.
	If we go ahead and click on **Document Imaging** without a scanner physically attached to our computer…
<selectscan>	…and select **Scan a Document.**
<noscan>	We get the message: "Unable to connect to imaging device."
Scanning Documents	
<scan1>	For the sake of this training module, we are going to act as if we have scanner physically attached to our computer.
	So, let's scan a document for the Duckling family.
	Search for the Ducklings using their Household ID, which is 11114330.
<scan2>	<no script>
<scan3>	Great! Now let's open **Little Duckling's** folder.
<scan4>	Before scanning we should always double-check that the scanner is connected via the USB port and turned on.
	Click the **Document Imaging** menu.

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<scan7>	Select **Scan a Document.** (Remember, we can only scan because the scanner is physically attached to our computer.)
<scan8>	<no script>
<scan9>	HuBERT is basically going to walks us through the scanning process.
	The **Scan a Document** dialog gives us some scanning options.
	The Scan Quality section provides options based on the type of document we are scanning.
	For the types of documents we'll be scanning in WIC, the default **Document with Images (Grayscale)**, should meet our needs.
	The **Document Feed** section provides options for loading the document.
	Since the State-provided scanners are single-page scanners, the default **Scan from Tray,** is appropriate.
	The **Scan from Automatic Feeder** option only becomes enabled if a scanner with that capability is attached to our computer.
	Assume we've loaded the scanner with our document and we are ready to commence the scanning process. Click **OK.**
<scan10>	Once we click **OK**, the scanner will begin scanning the document...
<scan11>	...and show its progress.
<scan12>	<no script>
<scan13>	When the scan is complete, the **Scanned Document Information** window opens.
	We are required to select both a **Document Type** and enter a **Comment**.
	Let's click the **Document Type** drop-down arrow to view our options.
<scan14>	Click the scroll bar and we'll quickly scroll through the list.
<scan15>	<no script>
<scan16>	There are a fair number of options to select from, one of which should match the type of document we've scanned.
	If not, we can always select **Other.** Let's do that.
<scan17>	<no script>
<scan17A>	<no script>
Scan4	Although the Document Type is required and the options are meant to provide a description of the scanned document, it does not display anywhere in HuBERT. However, it is saved to the database.
<scan18>	The **Select** button allows us to insert this document into other household member's Participant Folders without having to scan the document again.
	Since we also want this document scanned for Little Duckling's sibling, click the **Select** button.
<scan19>	To insert the scanned document into Yellow Duckling's Participant Folder, simply click the checkbox in front of his name…
<scan20>	...and click the **OK** button.
<scan21>	As we indicated before, a **comment** is required.

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Scan5	The comments text box **does** display in HuBERT.
	We highly recommend that you enter a descriptive title and a page number if the document consists of more than one page. You could also include the total number of pages.
Scan6	For example, if you have scanned an approval for PediaSure, you could type "PediaSure Approval" into the comment text box.
	If you have a Health Care Referral more than one page long, you could type "Health Care Referral" and its page number out of the total number of pages.
	This will help us to determine the contents of each scanned document without having to view it and will provide a "heads-up" if there is more than one page to the document.
<scan22>	We are going to type a quick description of our two page document into the **Comments** text box…
	<pause for typing>
	…and click **OK.**
<scan23>	A confirmation message displays indicating the scan was successful and that the document is now stored in the appropriate participant folders.
	Click **OK.**
<scan24>	Let's scan the second page of our document.
	Assume we've loaded the second page into the scanner. Can you remember how to scan it?
<scan25>	<no script>
<scan26>	<no script>
<scan27>	<no script>
<scan28>	<no script>
<scna29>	<no script>
<scan30>	<no script>
<scan31>	<no script>
<scan32>	Excellent! We are almost done. Select **Other** again.
<scan33>	<no script>
<scan34>	Go ahead and add the second page to Yellow Duckling's folder also.
<scan35>	<no script>
<scan36>	<no script>
<scan37>	We are going to type our same description and indicate the page number out of the total number of pages.
	<pause for typing>
	Complete the scanning process.
<scan39>	<no script>
Viewing Scanned Documents	
<scan40>	Once we've scanned documents, how do we view them?
	To **view** a scanned document, we also click on the **Document Imaging** menu.
	Click the menu again.

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Description	**Text**
<scan41>	This time, select the **View Scanned Documents** option.
<scan42>	<no script>
<scan43>	A grid opens listing all documents that have been scanned for this participant.
	The **Date** and **Time** each document was scanned is displayed.
	Notice that the **Document Type** we selected, which was "Other", does **not** display.
	Instead, the **Comment** we entered displays.
	This is why we recommended that a description and the page numbers be written in the Comment text field…
	…since that is what displays when we select a scanned document for viewing.
	Let's take a look at Page 2.
	To do so, select Page 2 in the grid.
<scan45>	Now, click the **View Document** button.
<scan46>	The scanned document opens via the **Windows Photo Viewer**.
	Let's go through the icons at the bottom of the screen.
	We can use the **Zoom Slide** to enlarge the image…
	…the **Fit to Window** icon to expand the document to the width of the window…
	…and the **Rotate** icons to turn the image.
	One icon should not be used and that is the **Delete** icon.
	We cannot delete a scanned document out of the HuBERT application using the Delete function in the photo viewer.
	It can only be deleted via the HuBERT application.
	Up on the menu bar, we are able to Print the **document** or **E-mail** it as an attachment (if Outlook is installed on our HuBERT machine).
	To close the Image Viewer, click on the **X** in the top right corner of the window.
<scan47>	Easy enough, right?
Reassigning Scanned Documents	
Reassign	If we accidentally scan a document into the incorrect participant folder we are able to simultaneously remove it and save it to the correct participant by clicking the **Reassign Documents** button.
	We can only reassign a document to one participant at a time.
<reassign1>	Let's reassign Page 1 to another participant.
	Go ahead and click on **Page 1** to select it…
<reassign2>	…and click the **Reassign Document(s)** button.
<reassign3>	We can reassign the document to any participant in our clinic.
	If we try to reassign a document to a participant not currently assigned to the clinic we are working in, we will get a message indicating that…
Reassign No	…the participant doesn't belong to our current clinic.
<reassignSWID>	Do you remember Greenie Grasshopper? We are going to add this document to the scanned documents in his folder.
	Greenie's State WIC ID is: **143098**. Enter his ID and click the **OK** button.

Description	Text
<reassignconf>	A confirmation message displays indicating the scanned document has been reassigned.
	When we click the **OK** button, the scanned document will be saved to Greenie's participant folder.
	Click **OK** on the message.
<reassignpg2>	Notice that Page 1 has been removed from Little Duckling's scanned documents.
	Go ahead and reassign Page 2 to Greenie also (State WIC ID: 143098).
<reassignSWID2>	<no script>
<confirmation>	<no script>
<verify>	Since there aren't any scanned documents left in this Participant Folder, as soon as you click **OK** on the confirmation message the **View Scanned Documents** window closes.
	Let's verify the scanned documents really have been reassigned.
	Click the **Document Imaging** menu again.
<veryify2>	Select **View Scanned Documents**…
<verify3>	<no script>
<verify4>	…and we receive a message indicating there aren't any scanned documents.
	Click OK.
Important	Even though we reassigned the documents to another household, we had assigned these documents to Yellow Duckling too. If they are not appropriate for Yellow Duckling, we must go into his folder and delete them.
Deleting Scanned Documents	
<Close>	Let's close Little Duckling's folder.
	Go ahead and look up Greenie Grasshopper using his State WIC ID: 143098…
<typeSWID>	<no script>
<open>	…and open his folder.
<open2>	Open the **View Scanned Documents** window.
<open3>	<no script>
<open4>	<no script>
<deletepg1>	To delete a scanned document without reassigning it to another participant, simply select the document in the grid and click the **Delete Document(s)** button.
	We are going to delete both scanned documents.
	Since Page 1 is already highlighted in the grid, we can click the **Delete Document(s)** button.
<deleteconf1>	Click **OK** on the confirmation message to complete the deletion process.
<deletepg2>	Go ahead and delete Page 2.
<deleteconf2>	<no script>

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<conclusion>	As we saw before when reassigning documents, as soon as there aren't any documents to display, the View Scanned Document window automatically closes.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the **Questions and Feedback Form** on the MDH WIC website.
Endslide	This completes Session 3: Module 4. This was a HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program.