Assistance Reporting Tool

Module: How to Scan a Document into ART

TRICARE Management Activity
Beneficiary Education & Support
Customer Service Support Branch

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Introduction

The scanning functionality in the Assistance Reporting Tool (ART) allows you to scan case-related documents and attach them to your case. It provides faster access to documents and reduces the risk of misplacing or losing hard-copy documentation. Finally, it provides a secure location for documents that may contain personal health information (PHI) or personal identifiable information (PII).

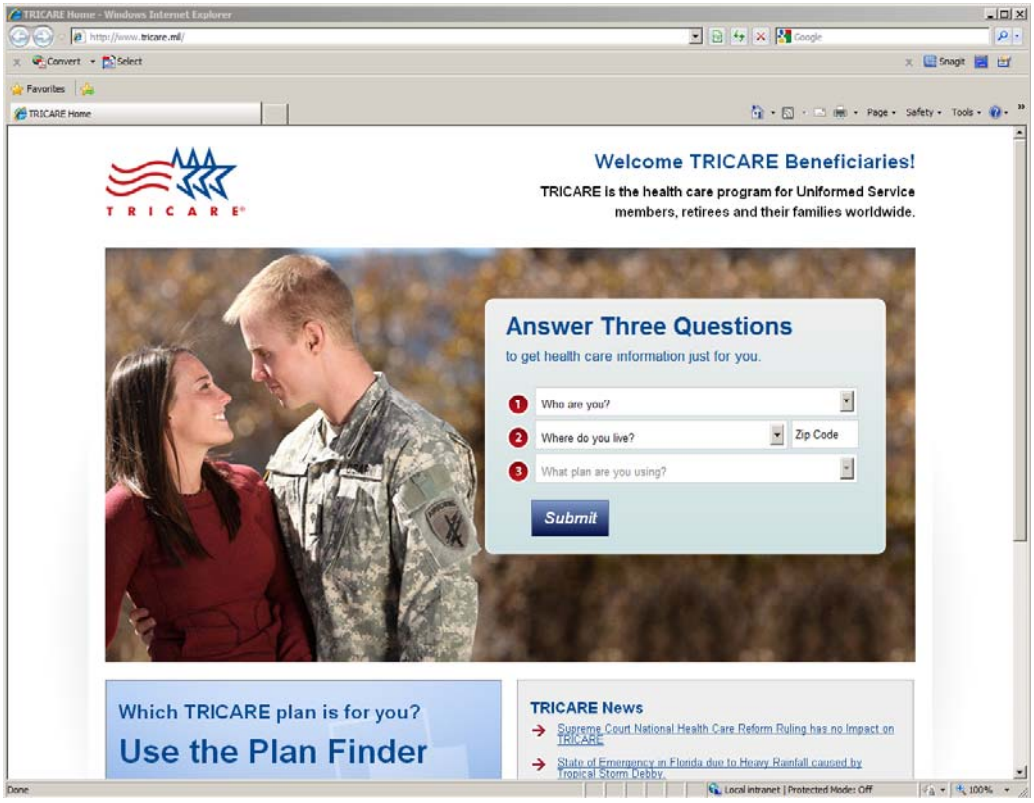
To conserve server space, **only scan unique documents** (i.e., those that don't exist in any other systems). For example, don't scan a TRICARE Explanation of Benefits since you can easily obtain a copy from the appropriate TRICARE contractor. However, do scan in a beneficiary letter as there is probably only one copy.

This module will guide you through the steps for scanning documents in ART.

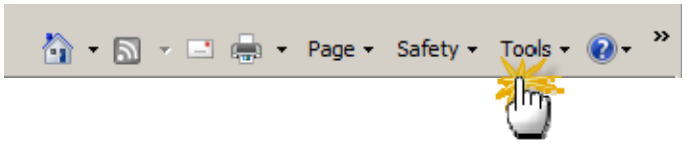
Deactivating your Pop-up Blocker

Before you begin scanning make sure your Internet browser's pop-up blocker is turned off, which is typically turned on in Internet Explorer by default. To turn it off, follow these steps:

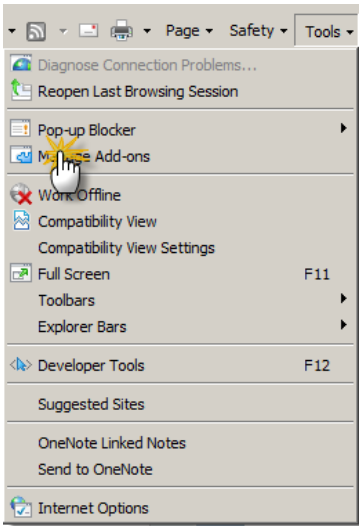
Step 1: Open Internet Explorer. Your home page displays.



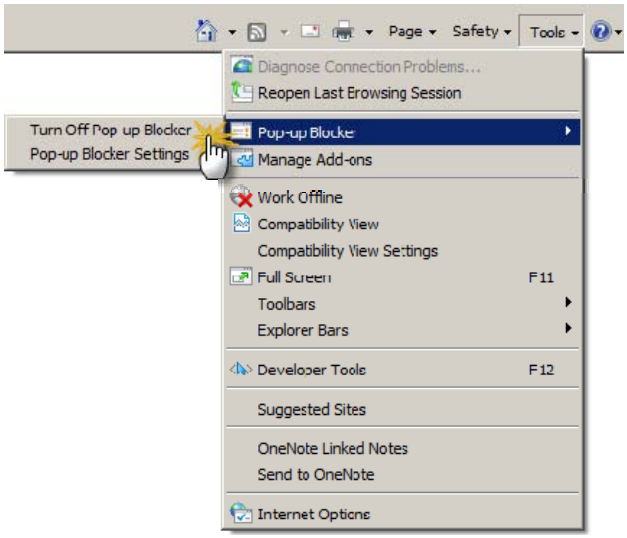
Step 2: Click the “Tools” button on the toolbar (typically located on top of your Internet Explorer Browser).



Step 3: Next, click “Pop-up Blocker” from the drop-down menu.



Step 4: To turn off Pop-up Blocker, click “Turn Off Pop-up Blocker” from the resulting menu.

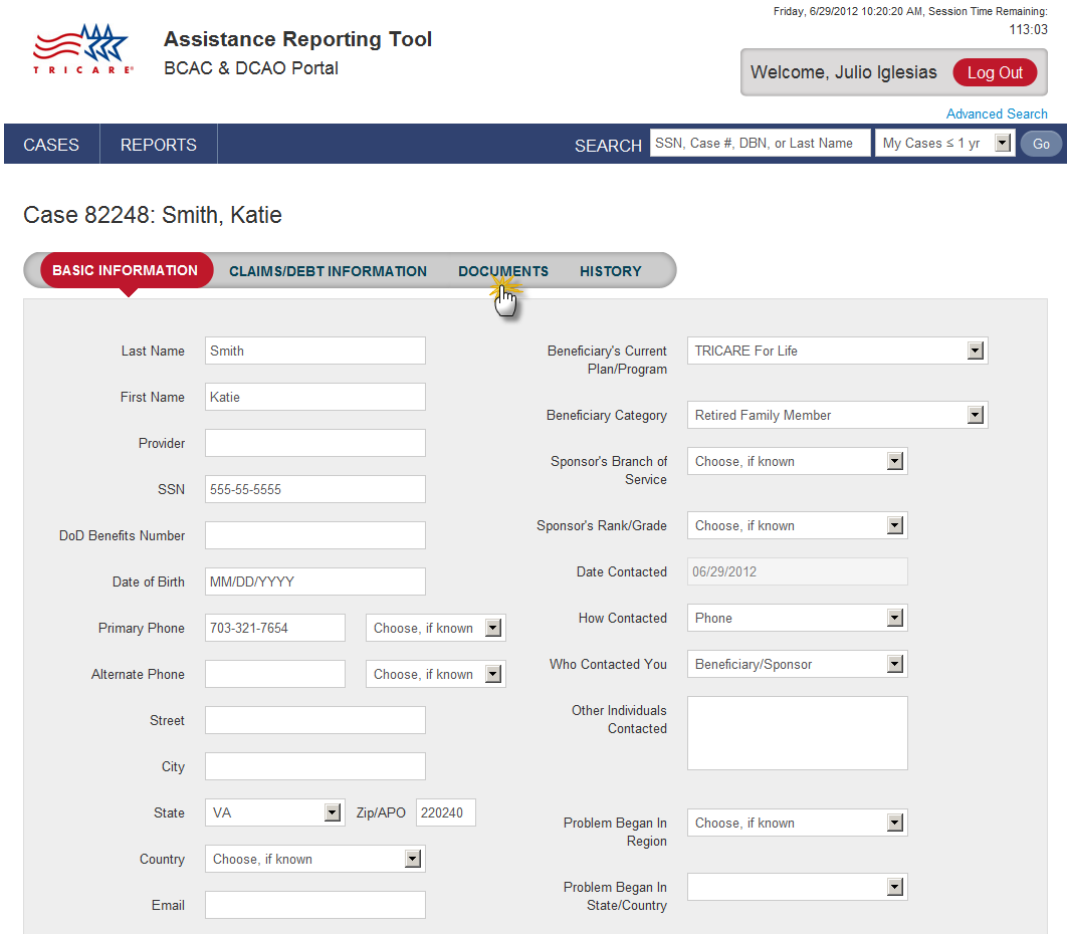


Scanning for the First Time and Installing the ActiveX Control

The **first** time you use the scanning feature you'll be prompted to install a browser plug-in. Please contact your IT department if you need administrative permissions to install the plug-in.

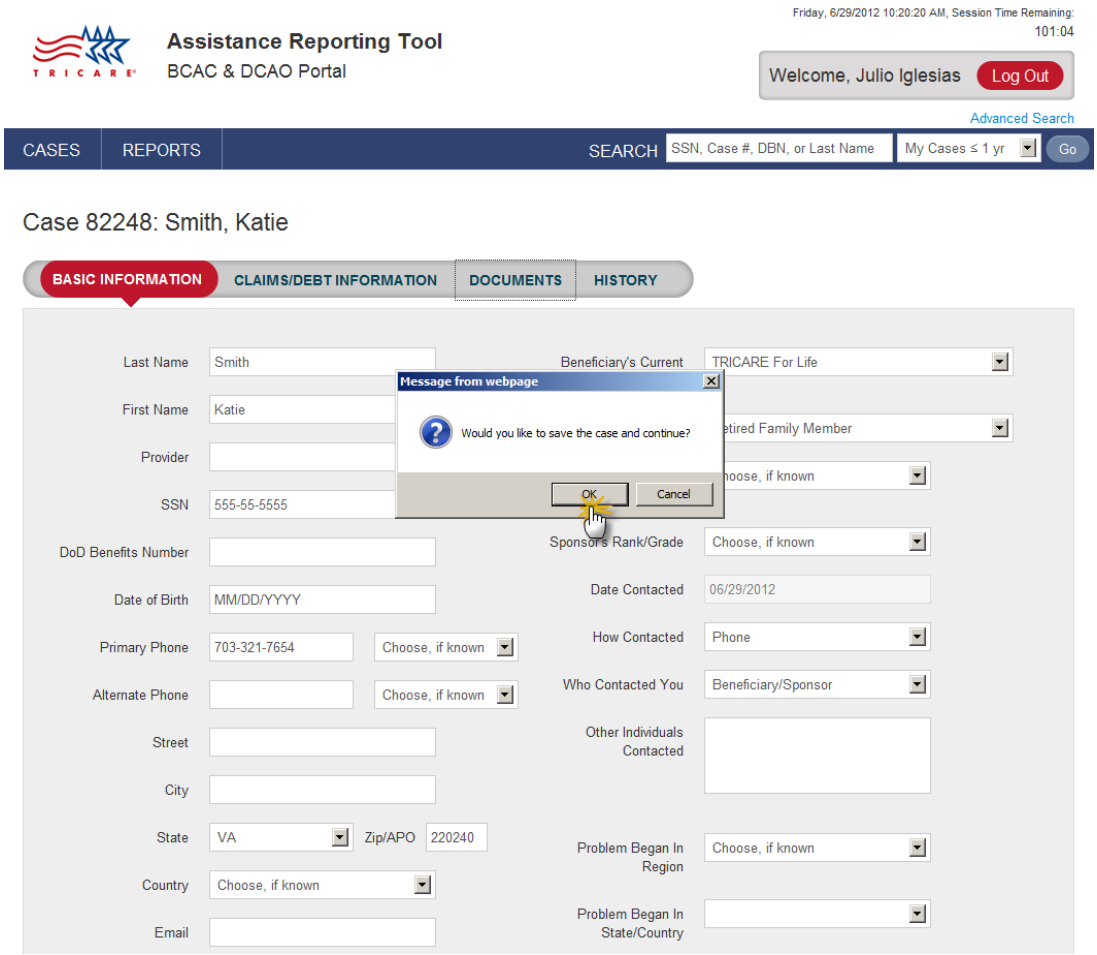
Note: The scanning feature **won't work** without the plug-in.

Step 1: While in a case, click the "Documents" tab.



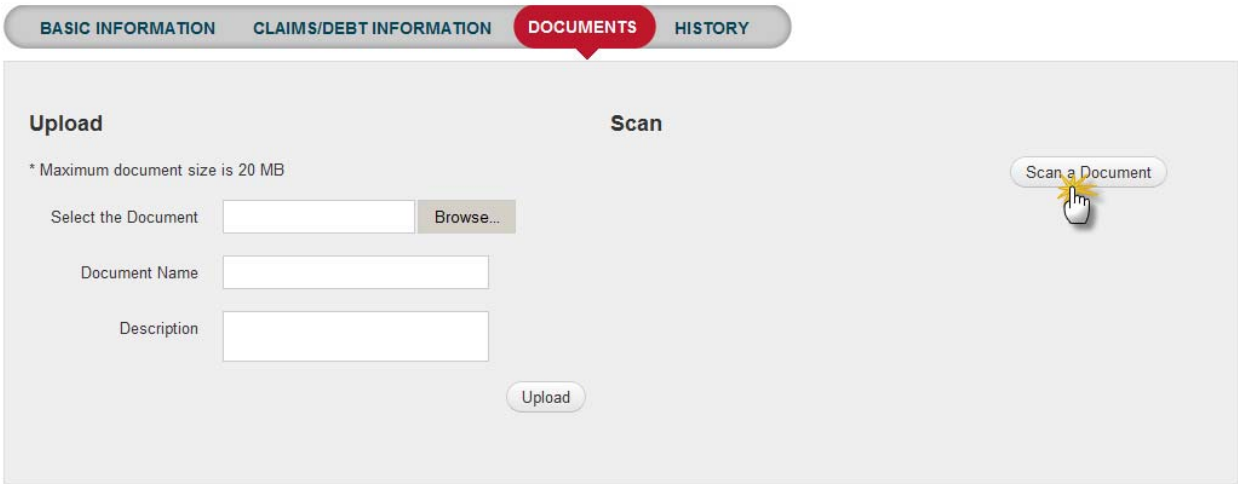
A pop-up window displays asking “Would you like to save the case and continue?”

Step 2: Click the “OK” button.

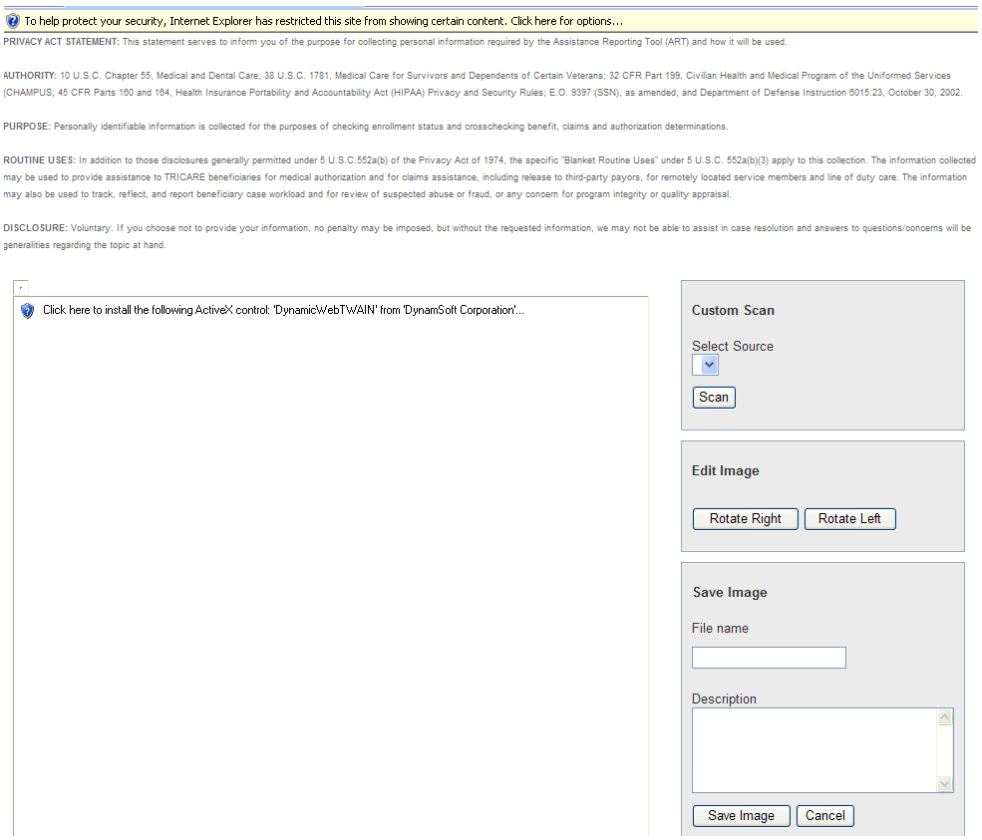


The “Upload/Scan” page displays.

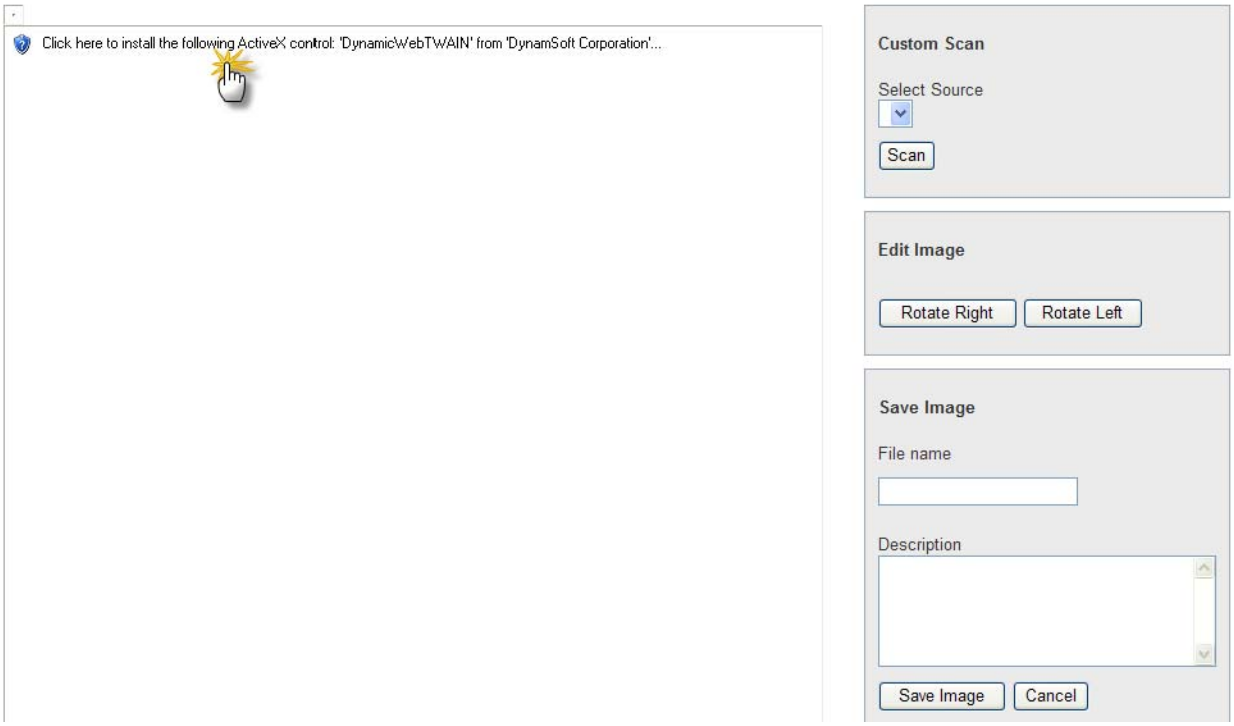
Step 3: Click the “Scan a Document” button.



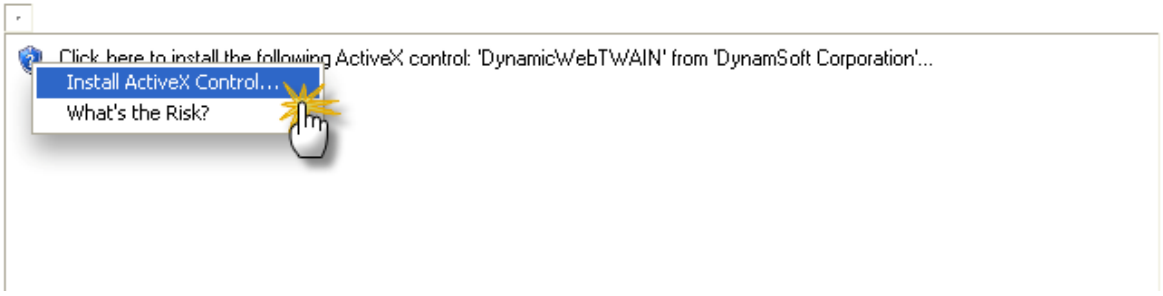
The scanning preview page displays. You'll now need to install the ActiveX Control.



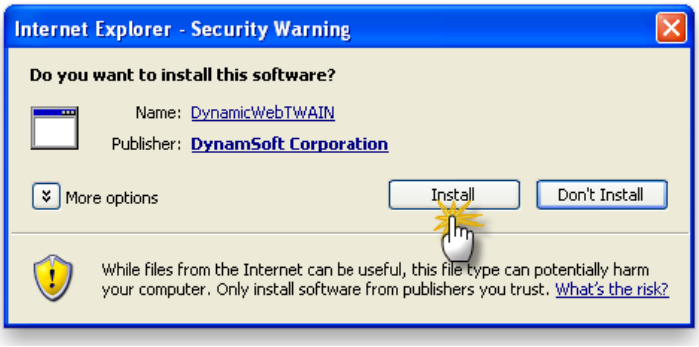
Step 4: Click on the message that reads “Click here to install the following ActiveX control ‘DynamicaWebTWAIN’ from ‘DynamSoft Corporation…’”



Step 5: From the drop-down menu, click “Install ActiveX Control…”

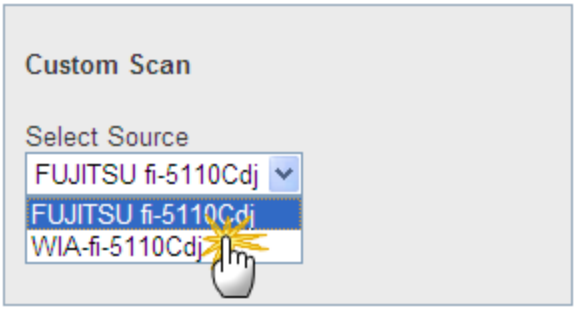


Step 6: A pop-up box displays asking “Do you want to install this software?” Click the “Install” button.

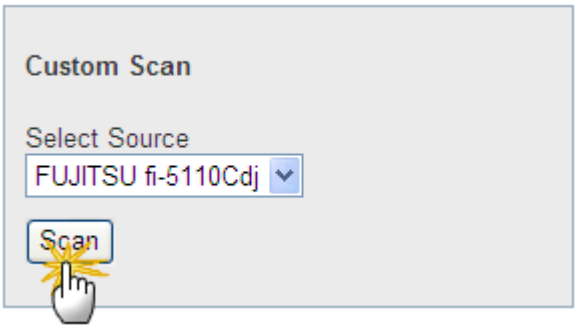


Once the installation is complete, your scanner(s) appear(s) in the “Select Source” field of the “Custom Scan” box. You may now continue with the scanning process.

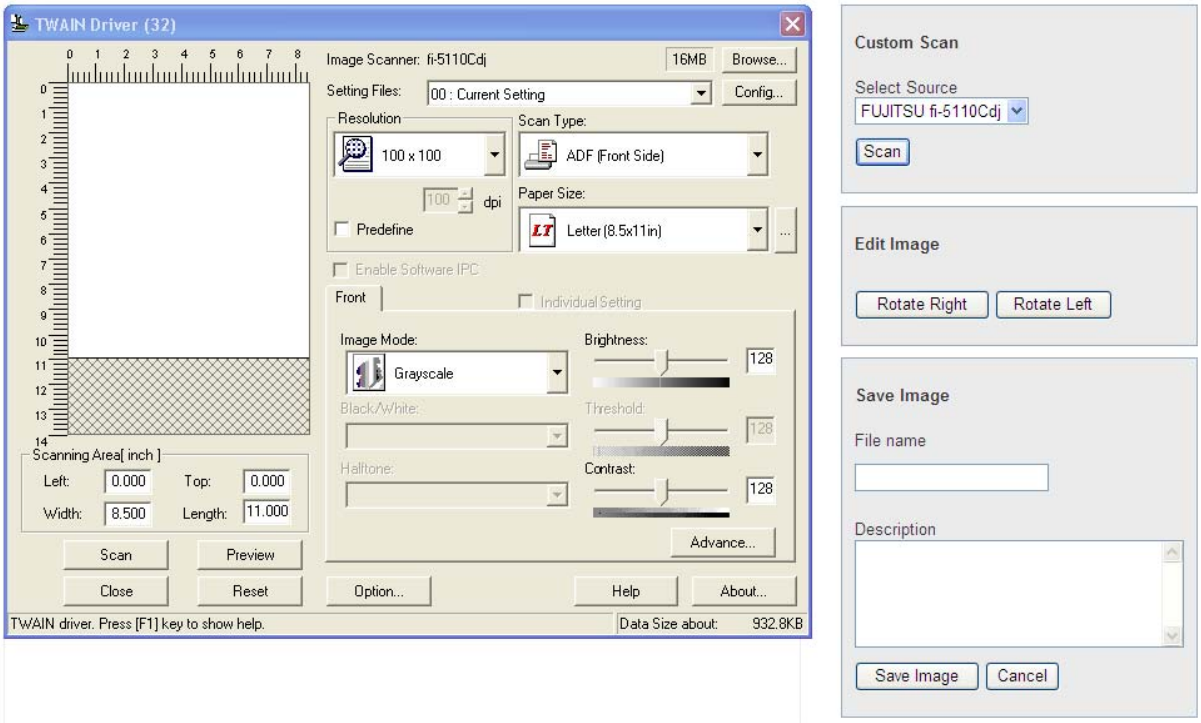
Step 7: Select the scanner your computer is mapped to.



Step 8: Position your documents correctly on your scanner and click the “Scan” button.



The scanning software installed on your computer opens a pop-up box, which allows you to control your scanner. Your options vary depending on your scanner.

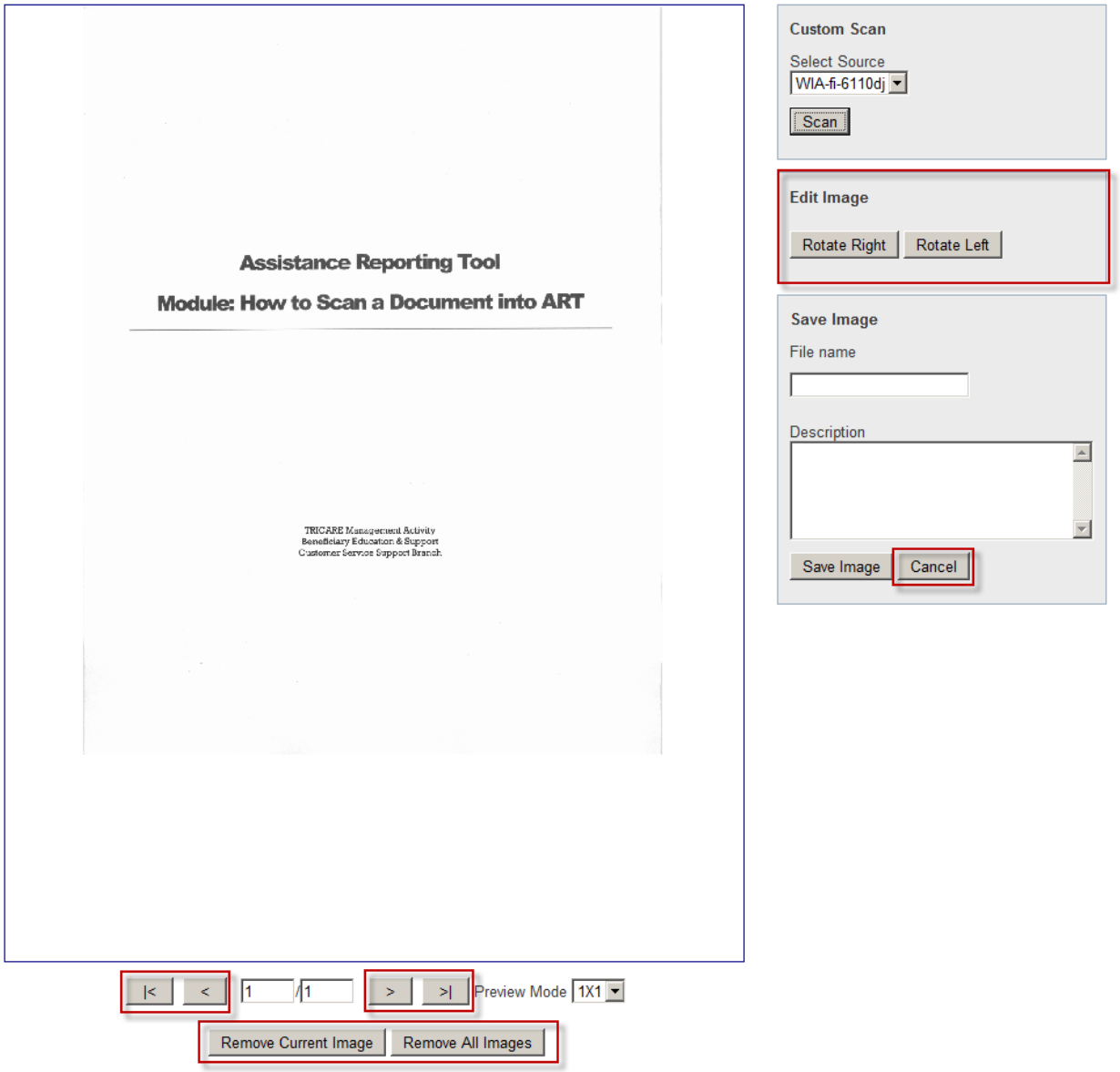


Step 9: Select the options you normally would to scan a document, such as paper source (e.g., flatbed, paper tray) or type of picture (e.g., color, black & white).

Step 10: Click the “Scan” or “Preview” button. The button you select depends on the scanning software installed on your computer.

Your document will begin to scan.

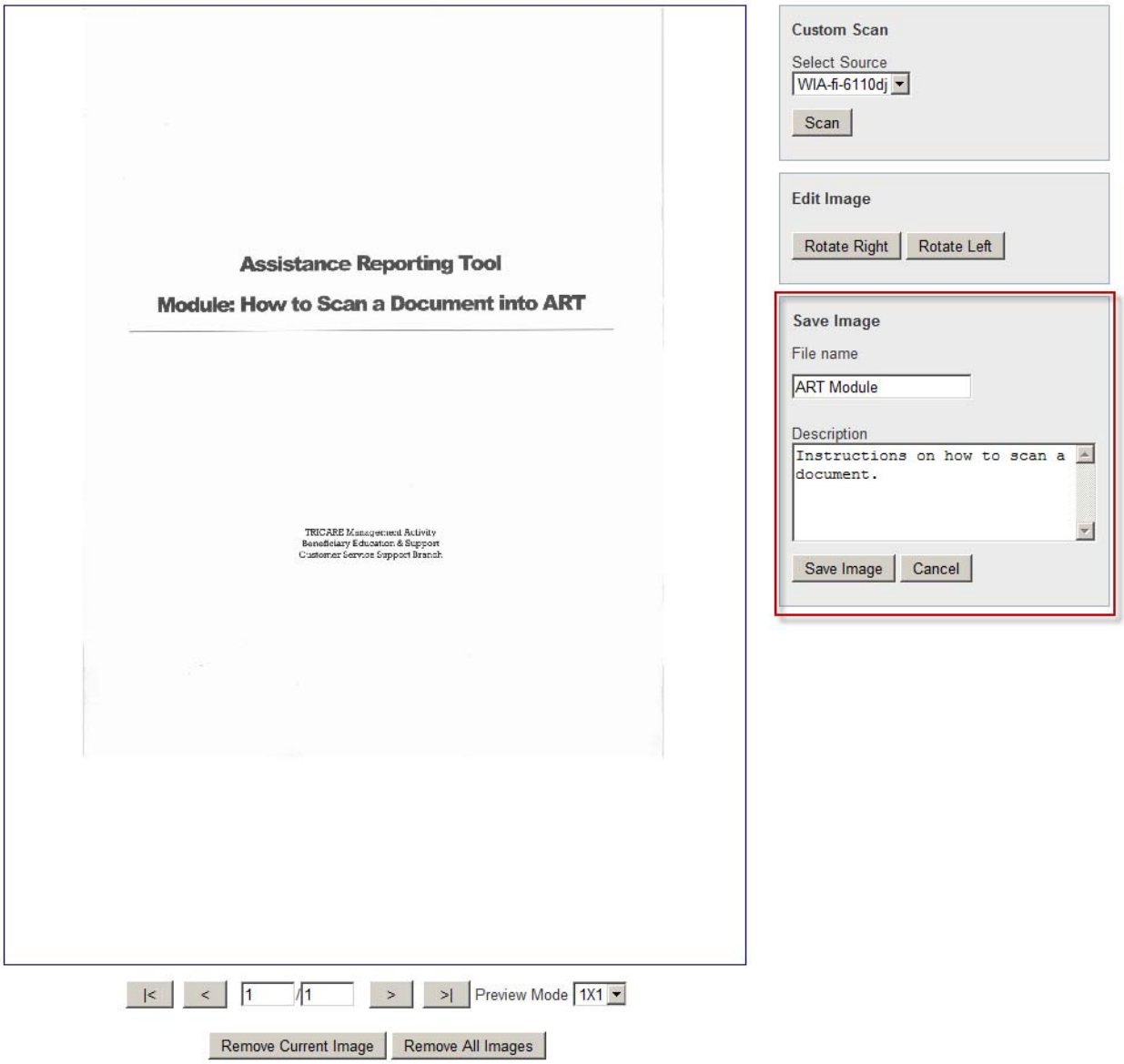
When the scan is complete the image of your scanned document(s) displays on the left hand-side of the scanning preview page.



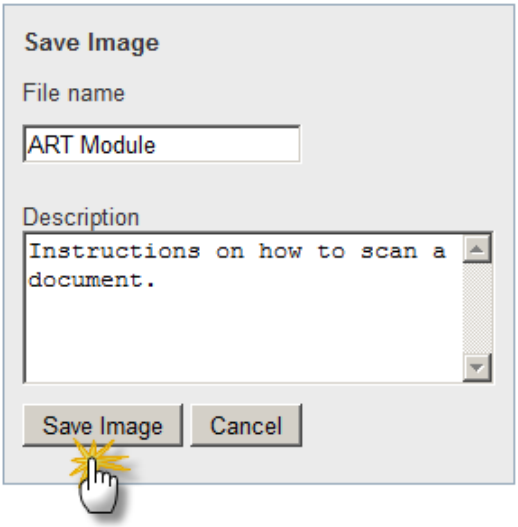
Step 11: Review the image(s) by clicking on the arrows at the bottom of the page. As you review each page, you can rotate the pages and remove some or all of the images scanned. If you're not satisfied with your scan, click the "Cancel" button. (See the buttons outlined in red above.)

Step 12: If you're satisfied with your scan and you're ready to move forward, enter a file name and description in the "Save Image" section. Both fields are required to save a document. (See area outlined in red below).

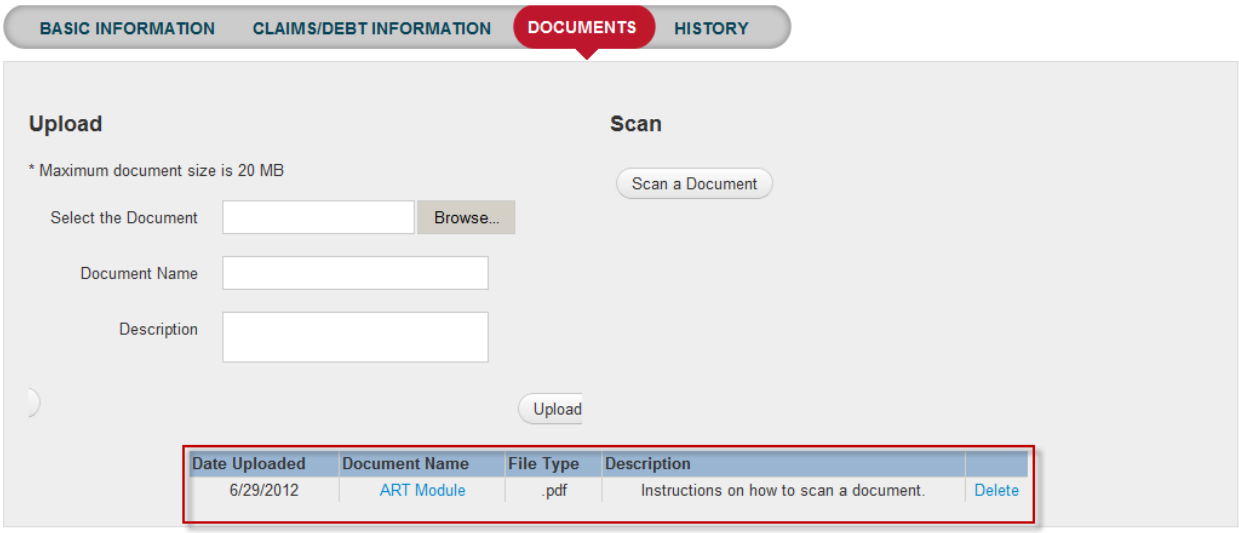
Note: The better you name and describe the document you scanned, the easier it's to remember what you scanned. This is especially important when referring a case so other users know what document(s) are attached.



Step 13: Click the “Save Image” button.



The scanning process is now complete. The scanning preview page closes and your newly scanned document appears in the list of documents in the “Documents” tab. (See area outlined in red below).



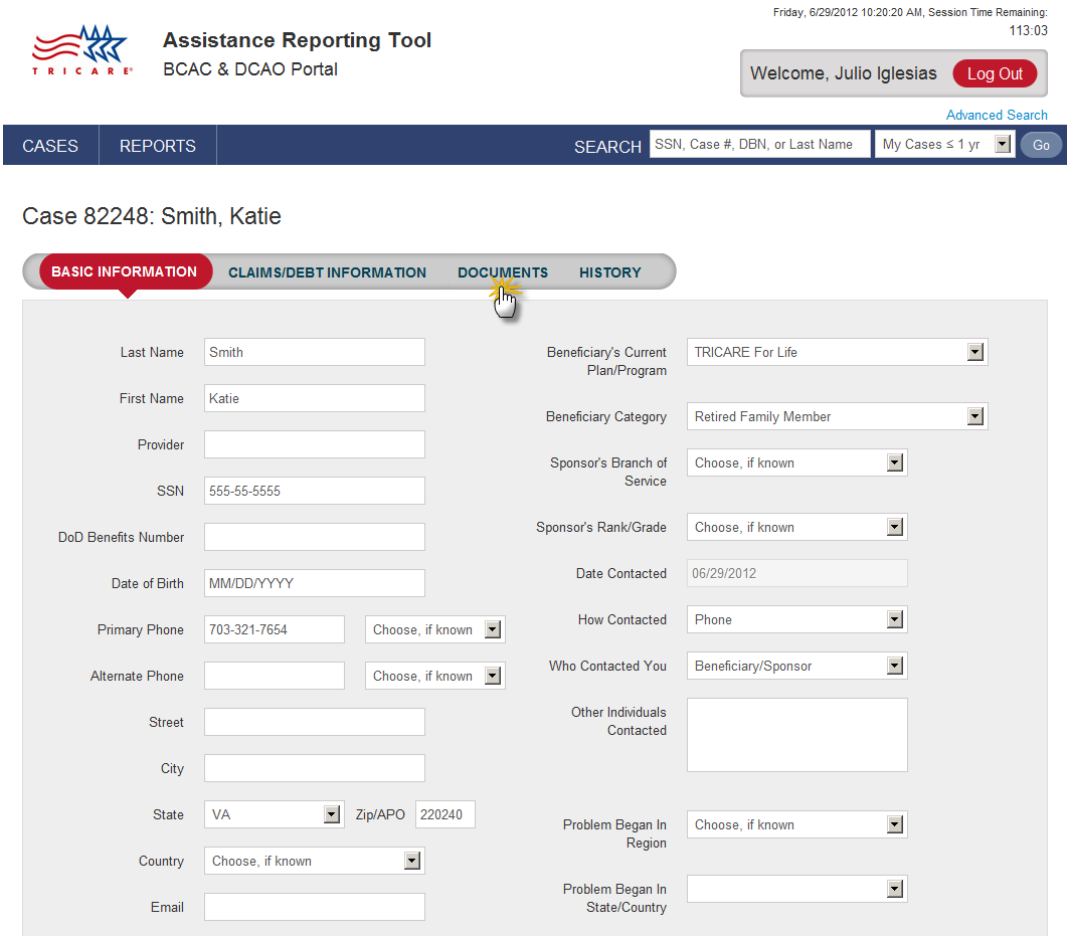
You can now:

- Remove a document by clicking the “Delete” link.
- Continue to scan more documents by clicking the “Scan a Document” button.

- Exit out of the “Documents” tab and continue working on your case by clicking on any other tab at the top of the page.

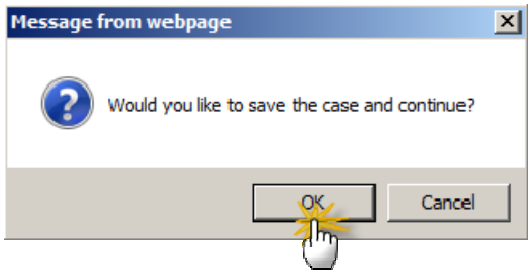
Scanning After Installing the ActiveX Control

Step 1: While in a case, click on the "Documents" link.



A pop-up window displays asking "Would you like to save the case and continue?"

Step 2: Click the "OK" button.



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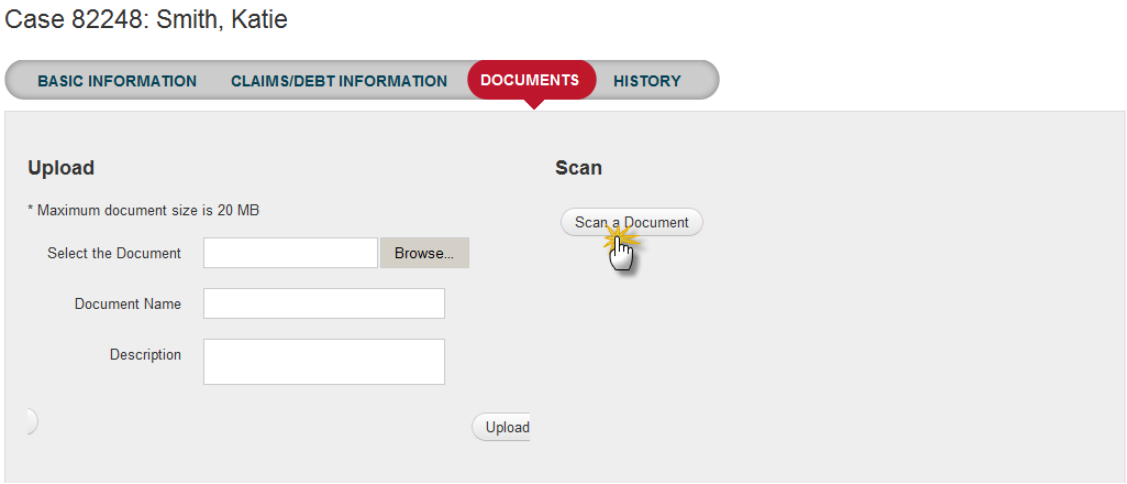
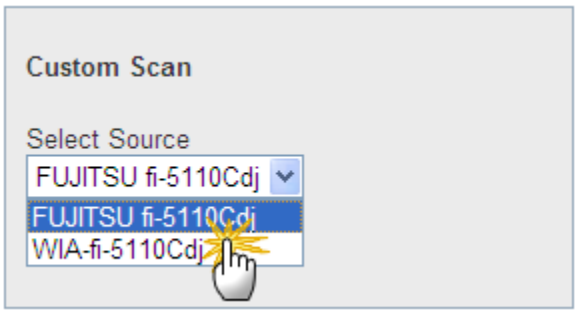
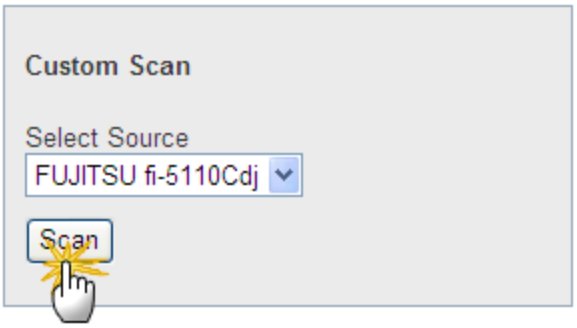


The scanning preview page displays.

Step 4: Select the scanner your computer is mapped to



Step 5: Position your documents correctly on your scanner and click the “Scan” button.



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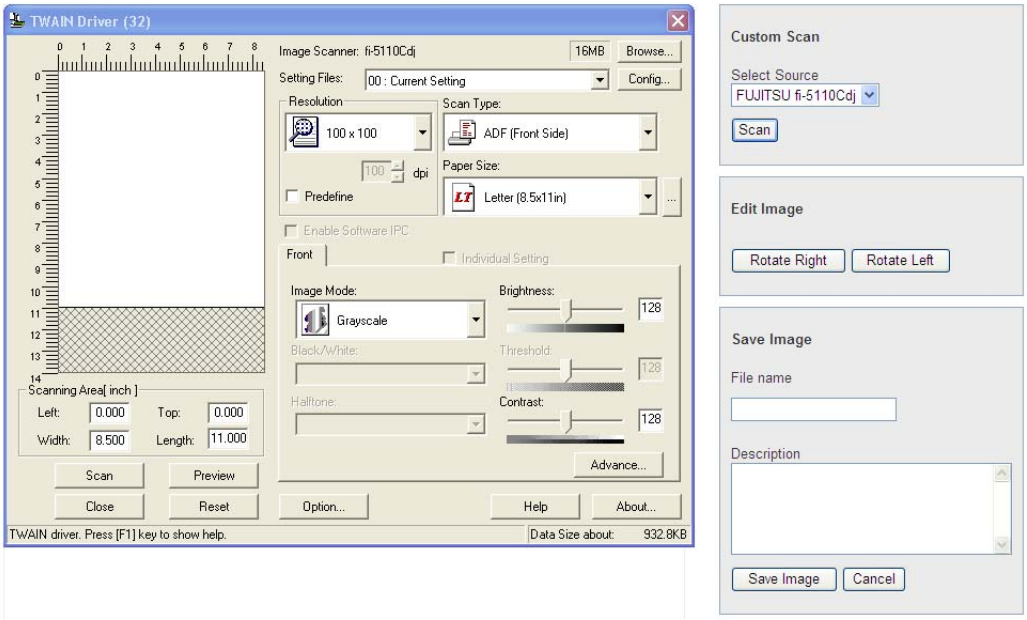

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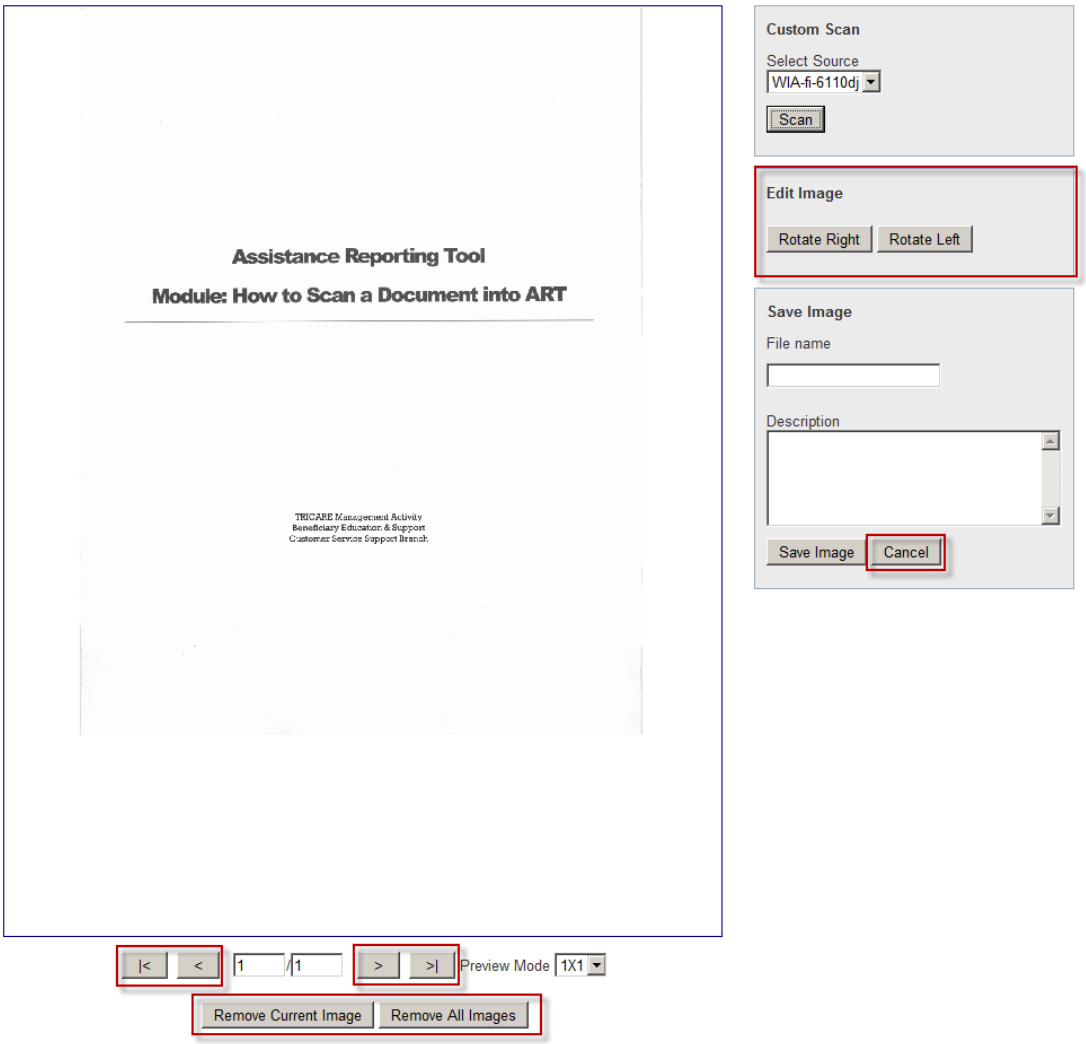

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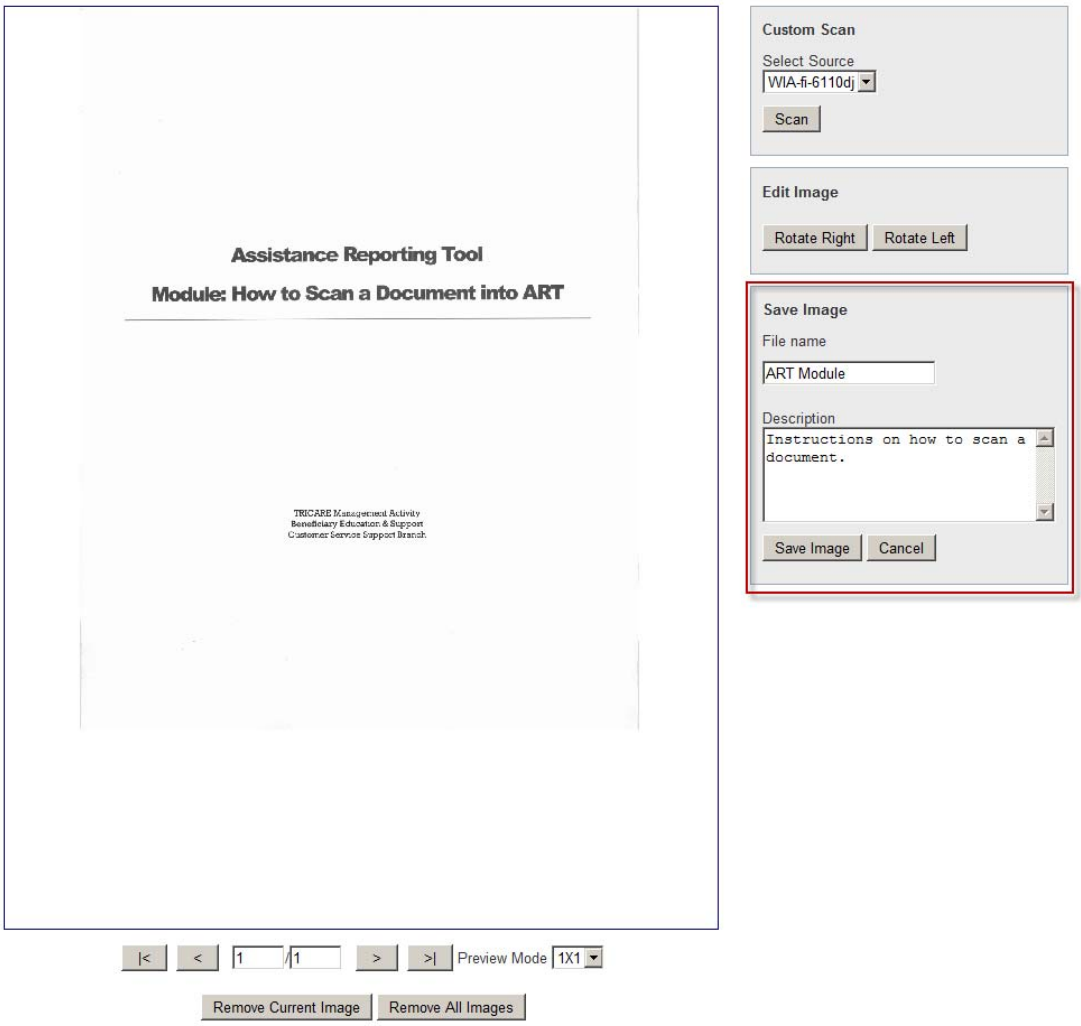
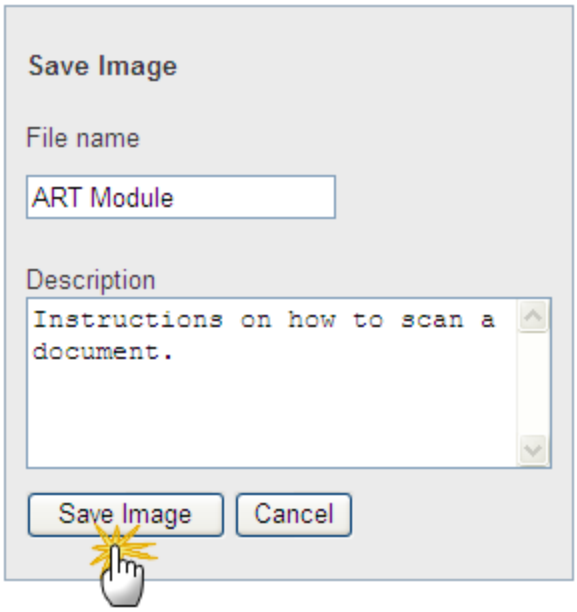


Step 10: Click the “Save Image” button.



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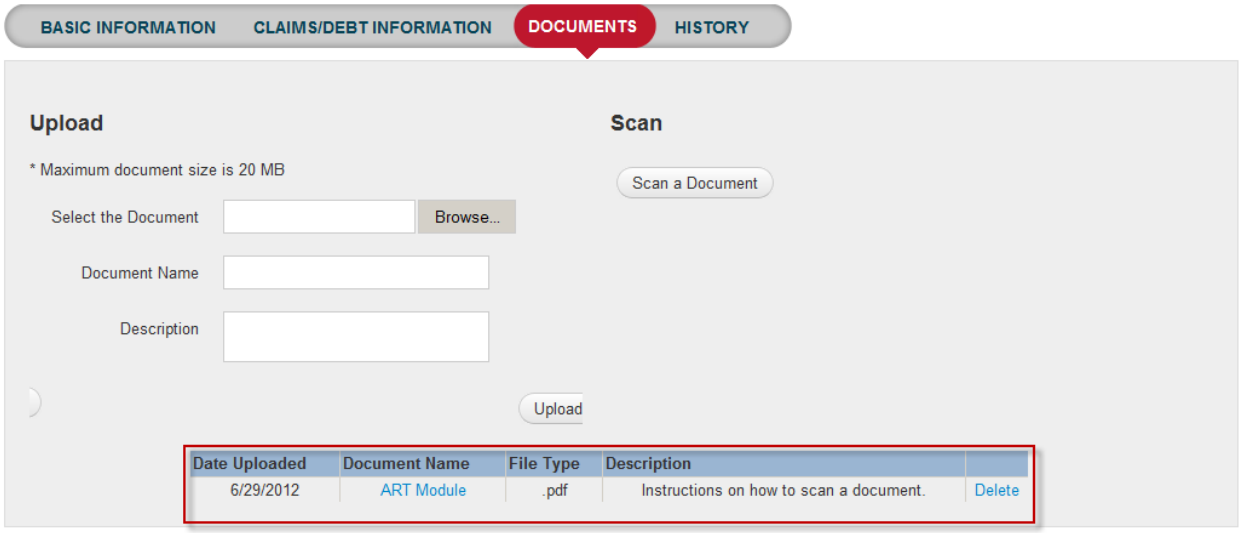

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- Exit out of the “Documents” tab and continue working on your case by clicking on any other tab at the top of the page.

Congratulations! You learned how to disable your pop-up blocker, install the ActiveX control plug-in and scan a document into ART! If you have questions or need help, please email BCACDCAO@tma.osd.mil.