

DocMgr - Insurance Card Scan Missing in DocMgr

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DocMgr - Insurance Card Scan Missing in DocMgr

Purpose: Follow this procedure when a user reports an issue with Insurance Card Scan Missing in DocMgr. Scanned cards undergo OCR (Optical Character Recognition) and ONLY new cards are shown in DocMgr. I.e: if a new card is scanned in February, and the same card is scanned in March April, May, DocMgr will only list the card from February, this is working as expected. The card scanned will only updated in DocMgr when there is a change in the card.

Required Information to be documented in each Incident:

- Contact Name
- Contact Number
- Clinic / Facility Number
- Patient Name MRN
- Month concerned
- Date Card scanned
- Report Run Date
- Detailed Description of the issue.
- Screen shot of Reports/DocMgr, etc.

Troubleshooting Process:

1. Confirm with user that the issue matches the issue reported.
2. Please document required information and troubleshooting details in the Incident.
3. Please attach any referenced knowledge articles to the incident.
4. If user states a new card was scanned, but is missing from DocMgr but is in the report, follow escalation process.
 - Cards scanned correctly will be listed in DocMgr under Type Admit/Ins/Consents as Insurance Card
 - Cards will only have a Document Date in DocMgr.
5. If user states a new card was scanned and is in the report but is missing from DocMgr, follow escalation process.

Classification Requirements

- Category
- Software & Applications
- Subcategory
- Clinical Applications
- Service
- eCube Clinicals Reporting

Resolution Process

Please review/update Classification and provide customer with the Incident number for their reference prior to resolving.

Resolution Categorization

- Resolution Code
- Solved Remotely (Permanently)
- Resolution Category
- Software & Applications
- Service
- Clinical Applications

Escalation Process

Please review/update Classification and provide customer with the Incident number for their reference prior to escalating.

Assign the Incident to the Following Group

- DTI-ADEX-DigitalPortals-SOP OnBase – L2

Published By: DTI-ADEX-DigitalPortals-SOP OnBase – L2