

eCube Patient Administration Toolkit - Removal of Scanned Insurance Cards

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Patient Administration Toolkit – Removal of Scanned Insurance Cards

Purpose: Follow this procedure when a user request issue with removing an Insurance Card scanned through Patient Administration Toolkit (PAT), formerly eCube Patient Lookup (eCPL). The Patient Administration Toolkit (PAT) application can be used to scan Insurance Cards for uploading into DocMgr. PAT utilizes a desktop card scanner connected to the computer. These will appear in DocMgr with Insurance Card as the document type.

Required Information to be documented in each ticket:

Contact Name Contact Number Clinic / Facility Number Patient Name Patient MRN Document Type Document Date Document ID Detailed Description of the issue. Screen shot of the Error

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. DocMgr can be filtered by MRN, Document Type, Account Number, Service/Creation Date ect. The Clinic Name is selected in eCube Patient Toolkit at the time the document is scanned. This will enable the user to locate the information needed for the 2nd level support team.
5. The user will be able to provide the details of the incorrect document.
6. Follow the escalation process.

Classification Requirements

Category

Software & Applications

Subcategory

Clinical Applications

Service

DocMgr

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

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