# M3P Captiva System

Captiva

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**Description:** This work instruction covers the steps to login and access the Captiva imaging system, how to navigate the different work queues and how to access the UI file share drive.

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| **Accessing Captiva** |

To access the Captiva and pin to your toolbar for future use…

Follow the steps below:

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| **Step** | **Action** |
| **1** | To login to Captiva, you must first access the Remote Desktop Connection.  Find and open the Remote Desktop Connection.   * Open the Windows **Start** menu, locate and expand the **Windows Accessories** folder, and then click **Remote Desktop Connection**.     OR you can type **remote** in the Windows **Search** bar and then click **Remote Desktop Connection**.    **Note**: Once opened, right-click the icon in your taskbar and select **Pin to taskbar** to easily access in the future. |
| **2** | Enter **PAC4RRCAPW40V** in the Computer field and then click **Connect**.    **Note**: The Computer field will automatically populate on future logins. |
| **3** | Enter your Windows password (the password you use to login to your computer) and then click **OK**.    A **Notice!** box pops up; click **OK** to clear. |
| **4** | Enter the security code provided via your VIP (VPN) token and then click **Submit**. (if you’re already logged in you may not be prompted for this step) |
| **5** | You are now connected to the remote desktop. Double-click the **Completion** icon. |
| **6** | Enter your Windows password again and then click **Login**.  The FIRST time you login, you MUST enter **PAC4RRCAPW10V** in the Server name field and check the **Connect to server group** **box!** The Server name will automatically populate and the box will be automatically checked on future logins.  **Note:** What you enter in the Server name field is different than what you entered in the Computer field in Step 2. |

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| **Getting Work in Captiva** |

To access the M3P queues to **get work**.

Follow the steps below:

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| **Step** | **Action** |
| 1 | After logging in to Captiva, the tool opens.  Click the **Departments** drop-down menu, select the department you want to work from, and then click **Apply**.  **Note**: M3P will always be the first department to start from because it contains all the new scanned images for the day. Once all work is completed in M3P, we will move to Pend.  As of right now, we are not using the Follow Up department. |
| **2** | All batches containing images ready for work in the selected department will display.  **Note:** You can filter this view without impacting the order the images will be worked. When working the images, they will always be in priority order. The lower the priority number assigned, the higher priority the image.  Fax (green) images are top priority. These are images re-routed to us from a 3rd party like a health plan.  Rescans (yellow) are mid-priority. These are images that have been Rescanned after we tag the original image as Rescan due to the image being unclear.  M3P (blue) are lowest priority. These are original images that have been scanned to process. |
| **3** | Click **Get Work** at the bottom right of the screen to open the next available batch.    The first image in the batch will open.  **Note**: Do not come back to this view to get a second image. You can click **get work** from the image screen to continue working in order. |

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| **Annotations** |

To add an annotation to the Captiva image …

Follow the steps below:

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| **Step** | **Action** |
| **1** | Open the annotation editor by clicking on **Annotate** on the top ribbon or you can CTRL+T. |
| **2** | The annotation editor will open on the right side of the application.  Select **Text**  Settings should default to Tahoma 16pt. If annotating from the M3P department queue, change the Style color to blue. If annotating from the Pend department queue, change the Style color to red. |
| **3** | Enter the annotation comment in the Text box where is says **write annotation text here**. |
| **4** | To add the annotation to the image, right click and drag to create a text box on the top/right side of page 1.    **Note**: The annotation will auto save to the image. |

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| **Closing Captiva** |

When you are not actively working in Captiva (break/lunch/end of day), and need to close out of the system and disconnect from the remote desktop connection…

Follow the steps below:

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| **Step** | **Action** |
| **1** | Close Captiva  Click the **X** at the top right of the screen. |
| **2** | Disconnect the Remote Desktop Connection  Right-click the **Start** icon at the bottom left of the Desktop, click **Shut down or sign out**, and then click **Disconnect**. |

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