

Instructions for Setting up Scanner to work with Encompass

1. Setup Scanner outside of Encompass

The first step in setting up the scanner is to ensure that it works outside of Encompass. To do so, do the following:

1. Follow the installation instructions provided with the scanner
2. Once the scanner appears to be installed, go to Start->Control Panel->Scanners and Cameras
 - a. You should see the scanner listed on this screen. If it is not shown, return to the installation instructions and try again
3. If the scanner shows up in "Scanners and Cameras", try the following:
 - a. Double Click on the Scanner Icon
 - b. Attempt to test the scanner through the Windows scanning tool
4. If you are able to scan in step 3, you are ready to move on. If not, you'll need to go back and figure out what went wrong.

2. Configure scanner to work with Encompass

Once you know the scanner is working independently of Encompass, you are ready to attempt to setup the scanner to work with Encompass. To do so, do the following:

1. Log into the machine as a user who has **administrative permissions** on the machine.
 - a. Note: If the user does not have administrative permissions, the following steps will not work
2. Log into Encompass as a user that has access to the "Peer Review Documents" module.
3. Go to "Peer Review Documents"->"Add new incident report or complete pending report"



4. On the "Add or Complete" screen, click "Add Incident Report (Scan Version)"

3 Incident Reports

Incident Details	IR Code(s)	Consumer (s)	Provider	Misc Info	Add Incident Report (Full Version) Add Incident Report (Scan Version)
NUMBER 962 DATE 08/06/2007 TIME 10:00 AM STATUS Sent to CMHSP - Waiting for Review	02 - Behavioral Incidents: 0210 - Not following program/house agreement	John Doe	Caro Center-State Facility	INCLUDE IN REPORTING Yes RIGHTS REVIEWED No	Change Delete View Add Reviewers Disposition Comments Print IR Close IR

5. On the "Add" Screen, click the "Scan" link toward the bottom of the page

Incident Reporting - Scanner Install_v01.doc

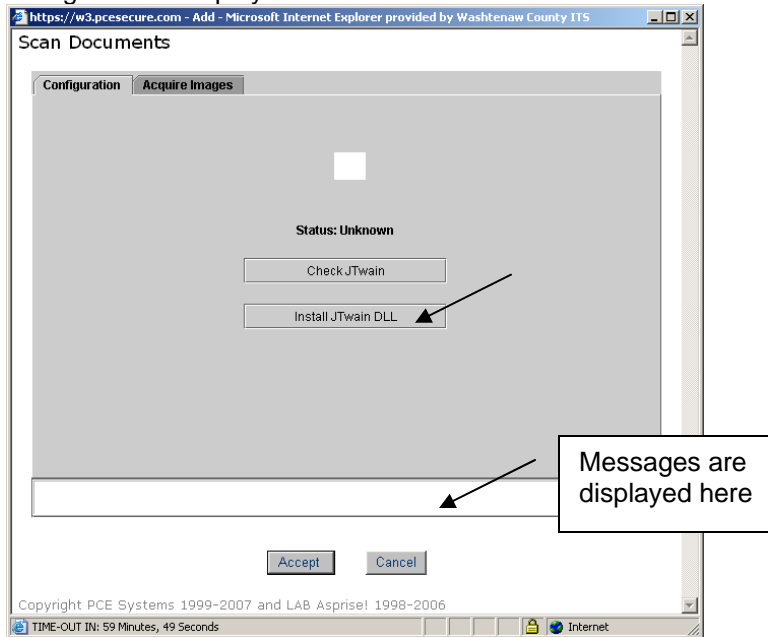
Scanned Documents
Pages: [Scan](#)

Notes

characters left: 30000

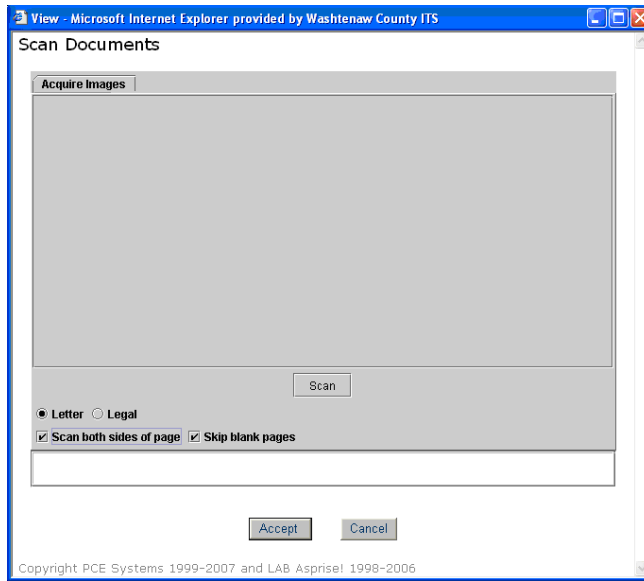
[✔ Spell Check](#)

6. If a window pops up asking “Do you want to trust the signed applet distributed by ‘PCE Systems’?” click Yes or Always.
7. At this point, a pop-up window should open (that looks like the following). Without performing any other actions on the screen, click the “Install JTWain DLL” button.
 - a. A message will be displayed at the bottom of the window



8. In the message window at the bottom of the window, look for the word “Success”. If you do not see any messages that proclaim success, likely causes are:
 - a. The current user is not **logged into Windows as an administrator** – Log out and log back in as someone with admin privileges
 - b. There are extra security constraints on the “System” folder (Encompass is attempting to download a .dll to Root:\\Windows\\System32) – Assuming the user attempting the installation is an administrator, temporarily change the permissions on the system folder to allow write access
 - c. An older version of .dll has already been loaded into memory – This happens if “Check JTWain” is clicked before “Install JTWain DLL” – Close all browser windows and start over
9. If you are successful, close all browser windows
10. Log into Encompass again and repeat steps 2-6. This time, you should see a pop-up window with no “Configuration” tab (see below).
 - a. If the “Configuration” tab is still present, you’ll need to go back to step 2 and troubleshoot the installation process

Incident Reporting - Scanner Install_v01.doc

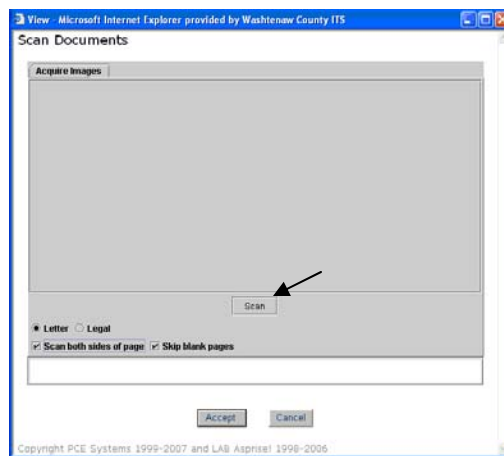


11. If your screen looks like the above, you're ready to get started!

3. Start Scanning!

Once you have confirmed that the scanner is working with Encompass, you are ready to start scanning in Encompass. To do so, do the following:

1. Log into the machine as the user who will be doing the scanning.
2. Follow steps 2-6 in *Section 2: Configure scanner to work with Encompass*
3. Place an Incident Report in your scanner's document feeder tray
4. Press the "Scan" button on the pop-up
 - a. The scanner should engage and pull the document through the scanning mechanism



5. If the scan is successful, you should see a thumbnail of the scanned image on the screen
 - b. If the scanned image looks correct, Press the "Accept" button
 - c. If the scanned image does not look correct, you can either stop the scanning completely by clicking "Cancel", or you can click the "Rescan" button to try it again.
6. That's it, you're done scanning!