# GET STARTED WITH CARD READER ONCE CONNECTED TO YOUR DEVICE:

# CRMS V3

# 1. Searching the client by swiping the OHIP card into the card reader:

You will need to plug the scanner into your computer. There are three different places you will see the scanner screen. In the CRMS Search Engine you can use the card to Search for a client.

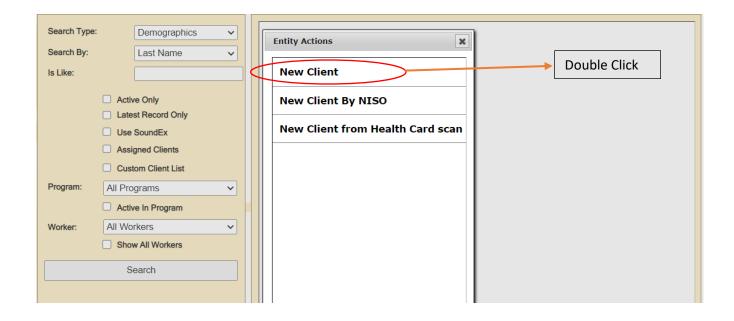
- a) If you double click on the Is Like box it will pop up a box called Card Scanner.
- b) Put your cursor in the **Scan Code** field and scan the card in the card reader.
- c) If the card reader is successful, it will populate the fields below it.
- d) Select which field you want to search with by clicking on the radio button.
- e) When you click **OK**, it will populate the **Is Like box** with that field.

In the example below, my search by is set to Last Name so I would select the **Last Name** radio button and it will populate the **Is Like box** with the last name from the health card.

Search Type Search By: Is Like:		Double Click				
	Use SoundEx	Card Scanner *				
	Assigned Clients	Type of Card: Ontario Health Card (Green) 🗸				
	Custom Client List	Scan Code:				
Program:	All Programs	Clear				
	Active In Program	Health Card number:				
Worker:	All Workers	Version Code:				
	Show All Workers	Last Name:				
	Search	First Name:				
		Date of Birth:				
		Ok Cancel				

#### 2. Creating a new client file with health card scanner:

The second option is to create a new client with the health card scanner. To do this click in the white space on the CRMS Search Engine (CRMS V3) and select **New Client from Health Card Scanner.** 



When you select **New Client from Health Card scanner** you will get the same box, except the radio buttons are now checkboxes. Put your cursor in the **Scan Code** box and scan the health card. If the card reader is successful, it will populate the fields below.

To create the client select which fields you would like to populate in the new client's file. Click **OK** and it will open the chart for you to continue to fill out the additional data points.

Search Type Search By: Is Like:		
io Liko.	Active Only Latest Record Only Use SoundEx	Card Scanner
	<ul> <li>Assigned Clients</li> <li>Custom Client List</li> </ul>	Type of Card: Ontario Health Card (Green)  Scan Code:
Program:	All Programs	Clean
Worker:	All Workers  Show All Workers	Health Card number:
	Search	Last Name:
		Ok Cancel

On the Client Demographics Page, you can double click in the **Health Card** field to launch the **Card Scanner** window. Put your cursor in the **Scan Code** box and scan the card.

If the card scan is successful, it will populate all the fields below. You can check which fields you would like to update in the client's chart by checking the checkboxes beside each field and select **OK** for them to update.

Search Q	A, A (04050101-02) - Active									
Démographiques	ographiques			Demographics						
Demographics Preferred N		ame: A			Birth Sex:		Male			
Agency History	Middle Name	: A		if 'Other':						
Client Data	Other: Car		anner			×	04050101	-02		
Health History	Last Name: Date of Birth:	Type of		Ontario Health	Card (Green)	~				
Immunization & Preven		Scan C	ode:		0	lear				
Medication Administrati							Ontario M	linistry of Health ar $\checkmark$		Select the
Medication History	Date Deceas	Health Version	Card number: Code:				ON	<b>`</b>		checkbox.
Metabolic Monitoring		Last Na	ime:						]	
OCAN Goals		First Na	ame:							
Risk Factors		Date of	Birth:				ssages	Permission to Contact		
Medication Reconciliation	Home Phone					$\cup$		~		
Medications	Work Phone:				Ok Ca	incel		~		

# CRMS V2

### 1. Searching Client's File:

You will need to plug the scanner into your computer. There are two different places you will see the scanner screen. In the CRMS Search Engine you can use the card to Search for a client.

- a) If you double-click on the Is Like box it will pop up a box called Card Scanner.
- b) Put your cursor in the **Scan Code** field and scan the card in the card reader.
- c) If the card reader is successful, it will populate the fields below it.
- d) Select which field you want to search with by clicking on the radio button.
- e) When you click **OK** it will populate the **Is Like box** with that field.

In the example below my search by is set to **Last Name** so I would select the **Last Name** radio button and it will populate the **Is Like box** with the last name from the health card.

earch Dashboar	RMS search engi	ne					
earch Dashboar earch Type: earch By: : Like:	Client Demographics     ✓     Active Only       Last Name     □     Latest Record C       Use SoundEx     Use SoundEx	Assigned Clients Prog	Active In Program	Completion by prescriber Medication Reconciliation Completed	Physical File Delete		
			Card Scanner Type of Card: Ontario Health Scan Code:	×		Search Walk In New Client	
			Health Card Number:			Close CSE	Select any radio but

# 2. Updating Client's File:

- a) On the **Client Demographics** Page, you can double click in the **Health Card** field to launch the Card Scanner window.
- b) Put your cursor in the Scan Code box and scan the card.
- c) If the card scan is successful, it will populate all the fields below.
- d) You can check which fields you would like to update in the client's chart by checking the checkboxes beside each field and select **OK** for them to update.

Please Refer to the below screenshot for the reference.

Save All Client Report	s Portal Access	
Demographics		
Demographics	Refresh Controls Demographics P	
Allergies		
Behaviours	Preferred Name:         Birth Sex:         ✓           Middle Name:         if 'Other':	
Client Data	Other: Card Scanner X	
Health History	Last Name:     Type of Card:     Ontario Health Card (Green)     Verry       Date of Birth:     4/ 8/2022     Scan Code:	
Immunization & Preventative Care	DOB Estimate DoB Unavailable	Select the
Medication Administration	Date Deceased: 4 / 8/2022 Health Card Number:	checkbox
Medication History	Version Code:	
Metabolic Monitoring	Home Phone: Preferred Name: V ontact:	
Needs & Strengths	Date of Birth:     Image: Comparison of Compar	
YSB Agency History	OK Cancel	
DSMV	Alternate Phone: Unknown Msgs: V Permission to Contact: V	
OCAN Goals	Email Unknown Msgs: V Permission to Contact: V	