GET STARTED WITH CARD READER ONCE CONNECTED TO YOUR DEVICE:

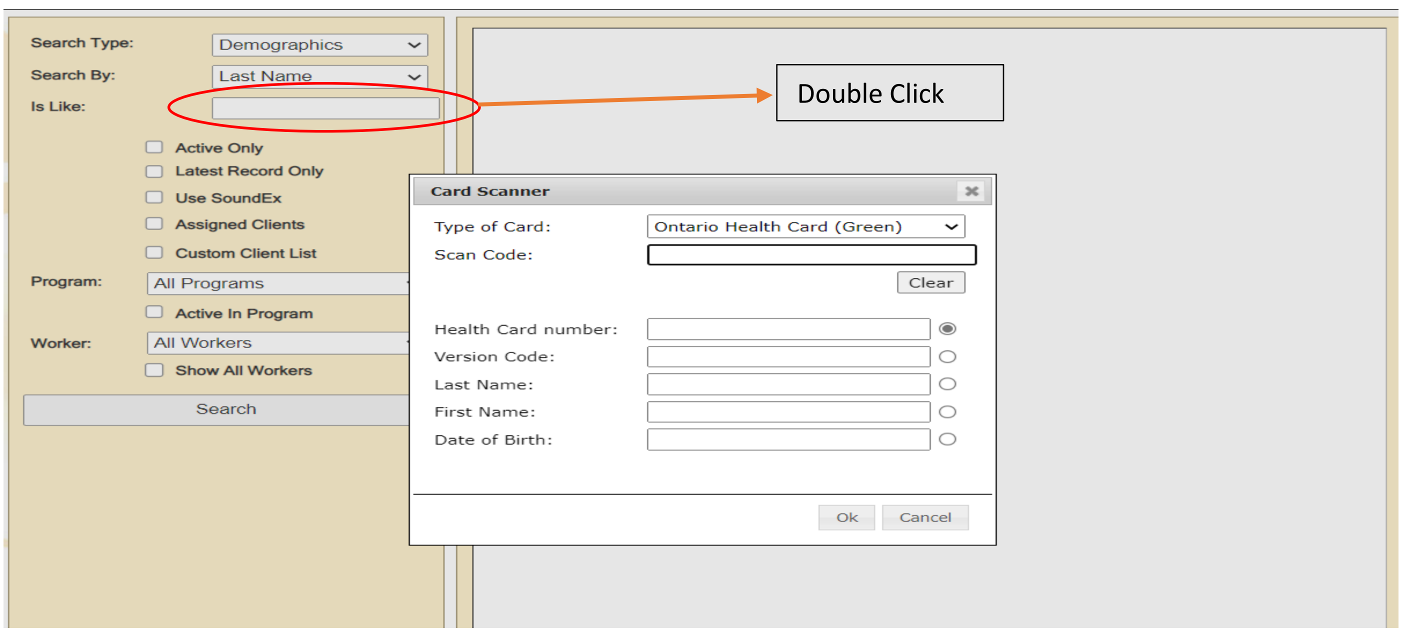
CRMS V3

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.

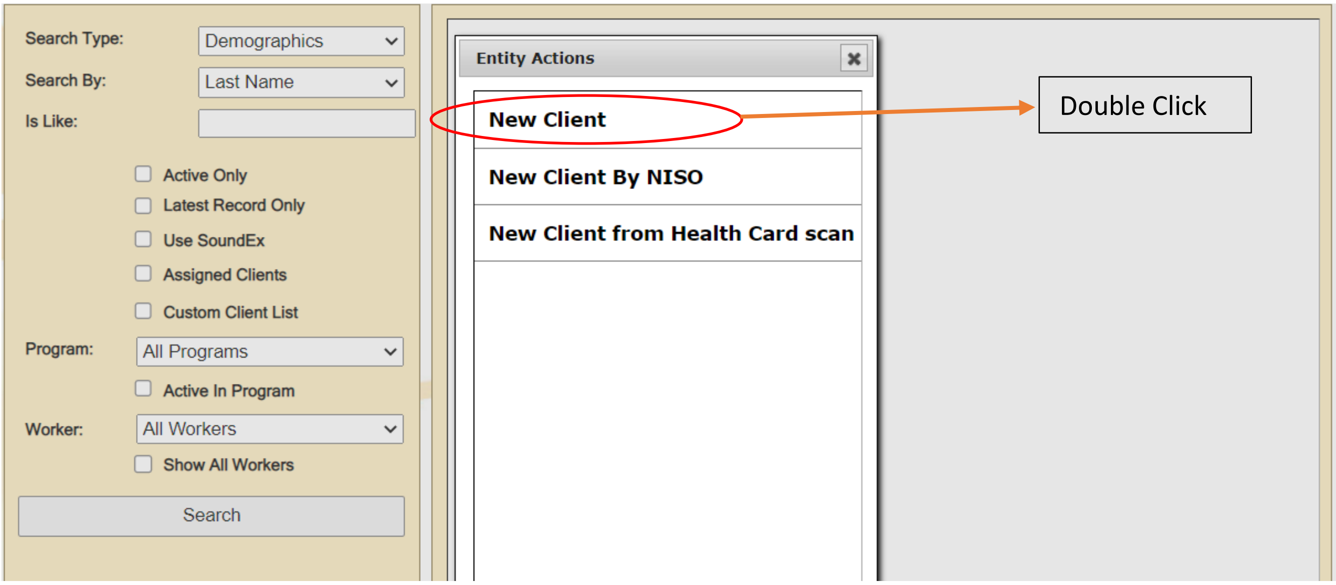
a) If you double click on the **Is Like box** it will pop up a box called **Card Scanner**.
b) Put your cursor in the **Scan Code** field and scan the card in the card reader.
c) If the card reader is successful, it will populate the fields below it.
d) Select which field you want to search with by clicking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



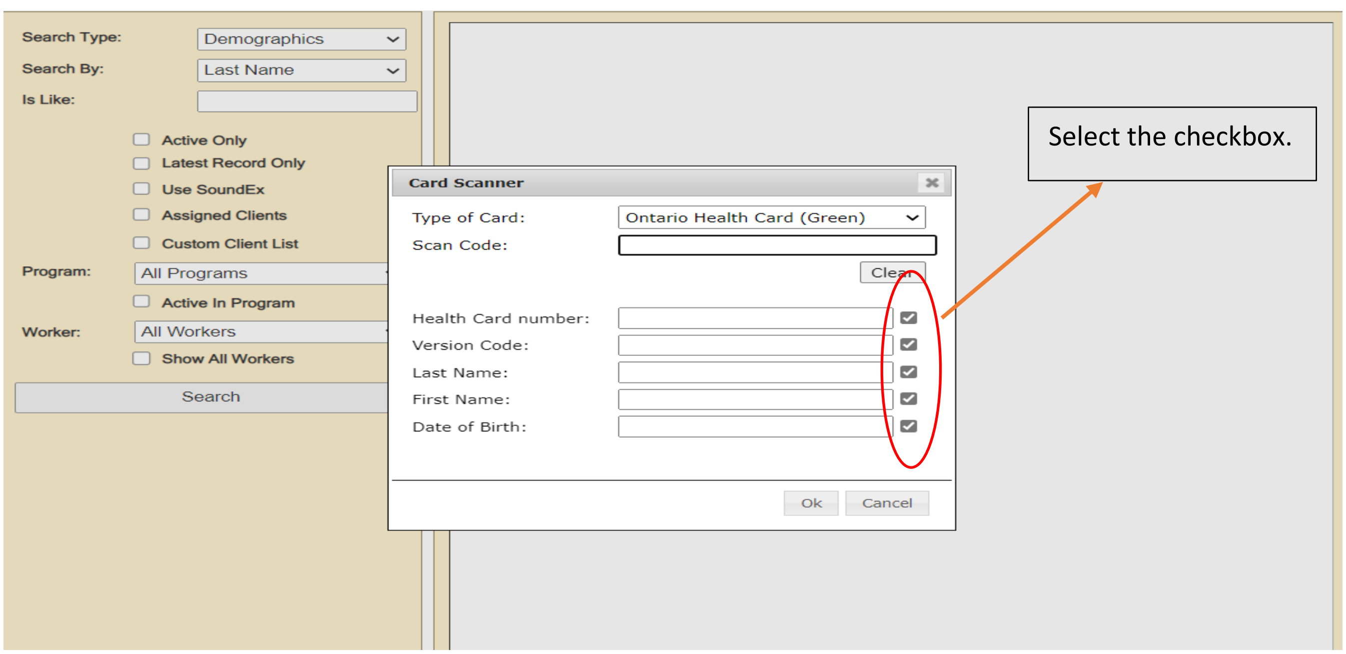
2. Creating a new client file with health card scanner:

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.**



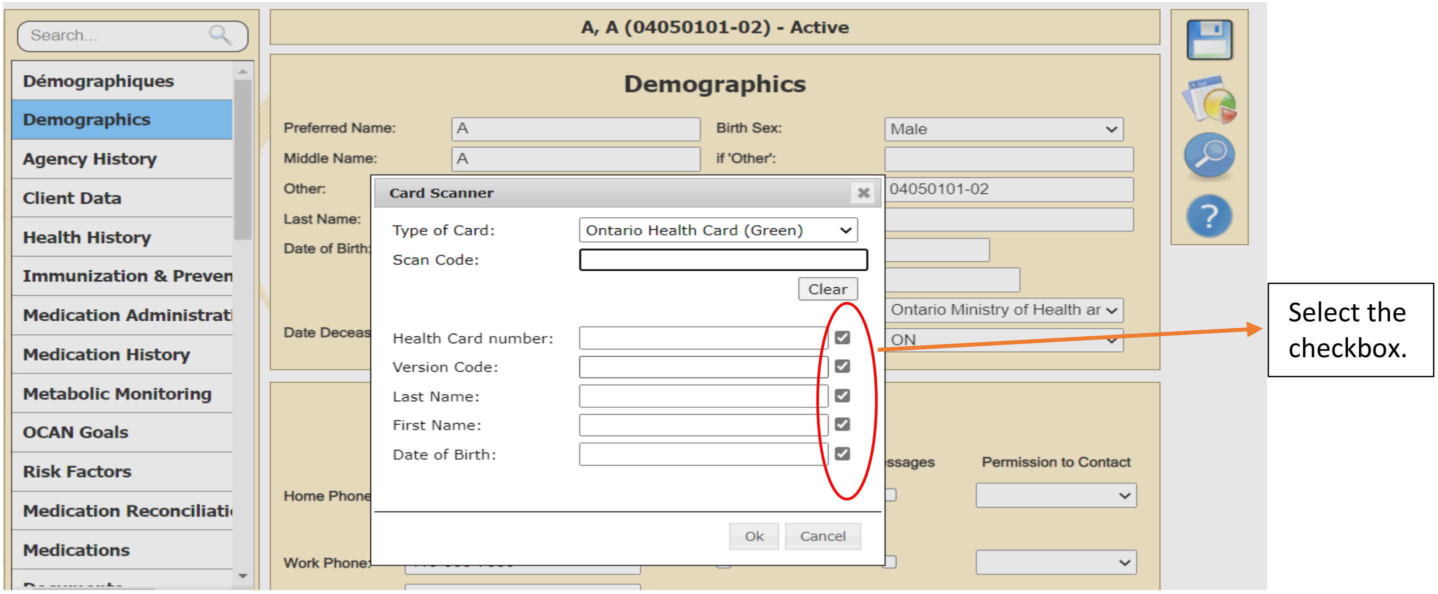
When you select **New Client from Health Card scanner** you will get the same box, except the radio buttons are now checkboxes. Put your cursor in the **Scan Code** box and scan the health card. If the card reader is successful, it will populate the fields below.

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.



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.



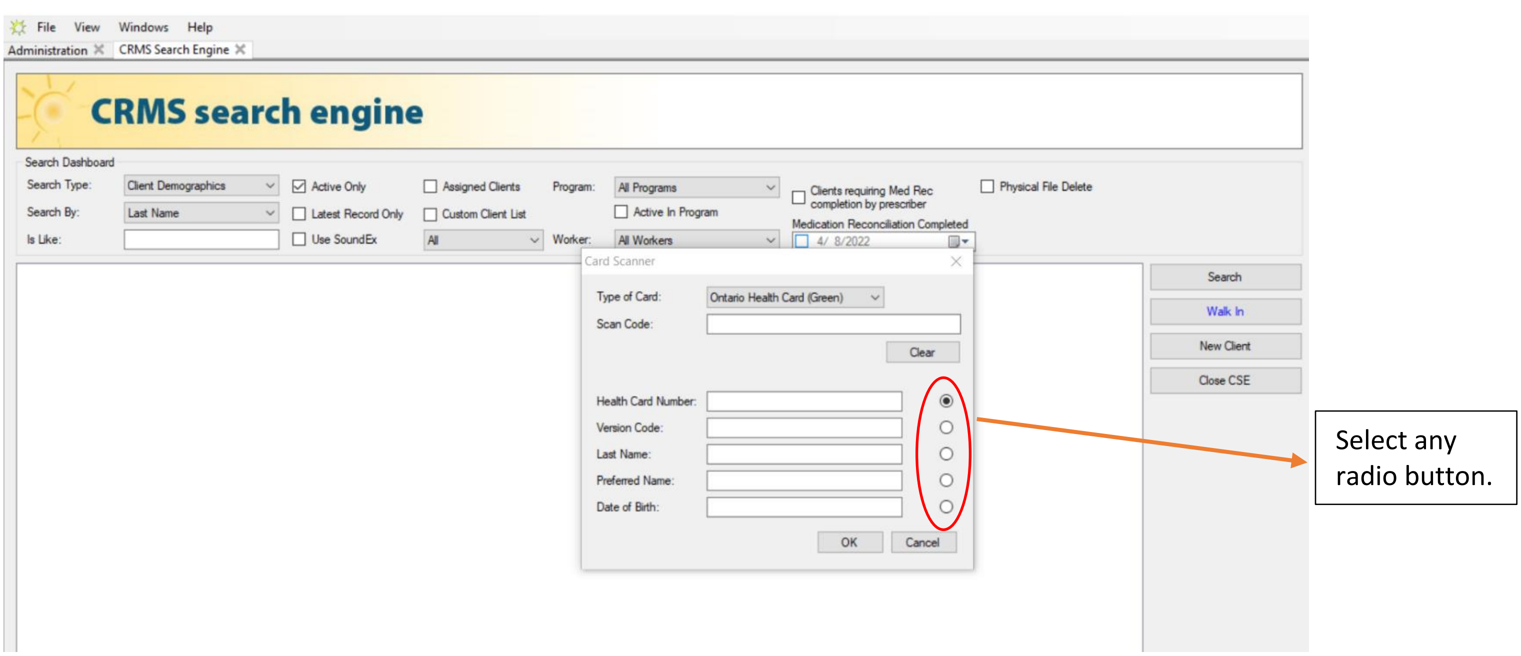
CRMS V2

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.



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.