
Electronic Photo ID Capture User Guide

Scanning and Retrieving Electronic Photo Identification



INTRODUCTION

This booklet describes the ProDOC interface with CU*BASE that is used to capture electronic photo IDs and the Verify ID button in CU*BASE that is used to retrieve the ID image. Using these two processes, you will be able to scan and retrieve photo identification of members to help in the verification of their identity.

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For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php

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OVERVIEW AND TERMINOLOGY

The following terms are used in this booklet (listed alphabetically):

<i>Term</i>	<i>Description</i>
Archive	This term refers to the area on the server where an electronic version of the photo ID is kept. All scanned photo IDs are placed in the archive for later retrieval.
Electronic Photo Identification (ID)	This term refers to the electronic image that is created when the photo identification is scanned into the computer using the scanner.
iSweep appliance	This is a server that is housed at the credit union and provides the transfer point of the electronic photo identification from the teller station to the archive.
ProDOC	This software uses a scanner to create and save the electronic photo ID.
Scanner	This term refers to the USB device that connects directly to the teller PC. It is used to collect the electronic image of the photo ID. 

SCANNING AN ELECTRONIC PHOTO ID

Use the ProDOC software to scan the member's photo identification.

LOGGING ON TO PRODOC

1. ProDOC will automatically launch on your PC desktop when you login to your computer at the beginning of your work day.
2. Type in your ProDOC user name and password and click the Login button.

ProDOC Login Screen



Once the login is completed the ProDOC icon will appear in the Systems Tray at the bottom right hand corner of the computer screen.

ProDOC Icon in System Tray

Your ProDOC icon is accessible in your System Tray as pictured here.




- Next, launch CU*BASE and your printer session and log into both of them appropriately.

If you need to log into ProDOC after your initial login, you can start the program by double clicking the icon on your desktop.



SCANNING AND SAVING THE ELECTRONIC PHOTO ID

At the release of this manual, tellers can only scan identification into their own members' accounts, including primary members, joint members, and even beneficiaries. At this time, only scan photo identification into this database. Due to the larger size of the image files, it is recommended that tellers scan only one side of the photo ID.

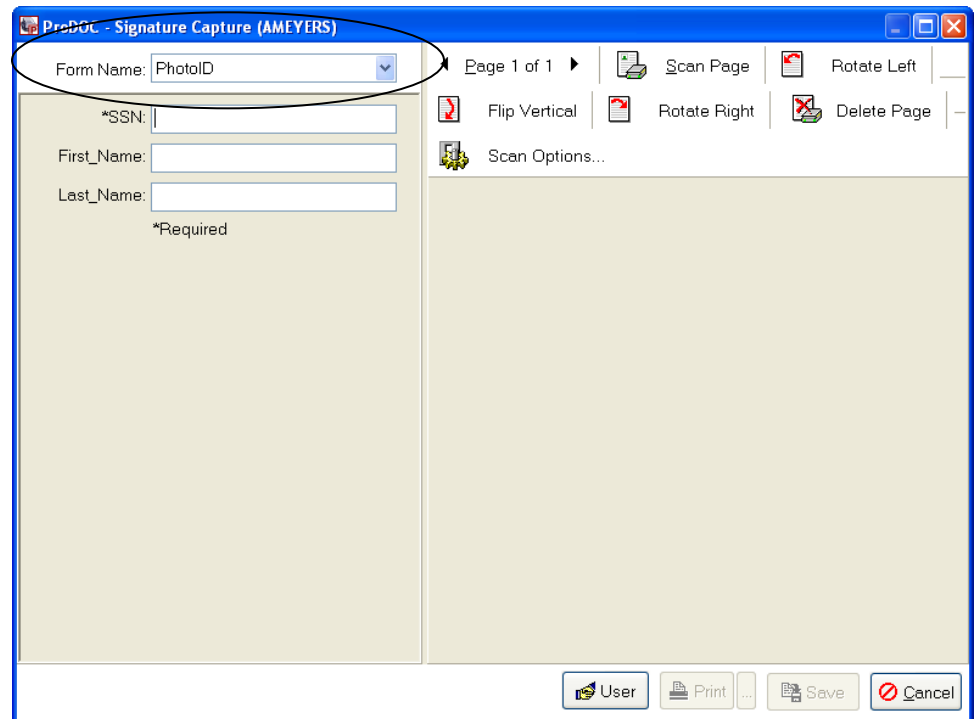
- Right click on the ProDOC icon in your System Tray  and select Scan.

ProDOC Icon "Right clicking and Selecting Scan"



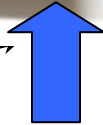
2. Select Photo ID from the drop-down menu next to Form Name.

Scanning an ID—"Photo ID is Selected"



3. Place your photo ID on the scanner. Note the "Tips for Scanning a Photo ID" on the following page.

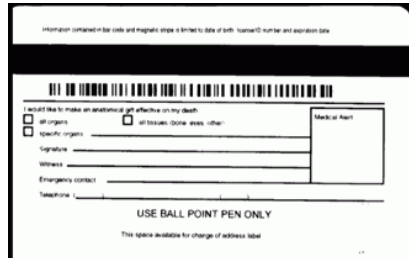
Tips for Scanning an Adult License



Always place the identification aligned with the right hand side of the scanner.

Push to the right side

You may need to give it a little pressure to push it through.



Correct!



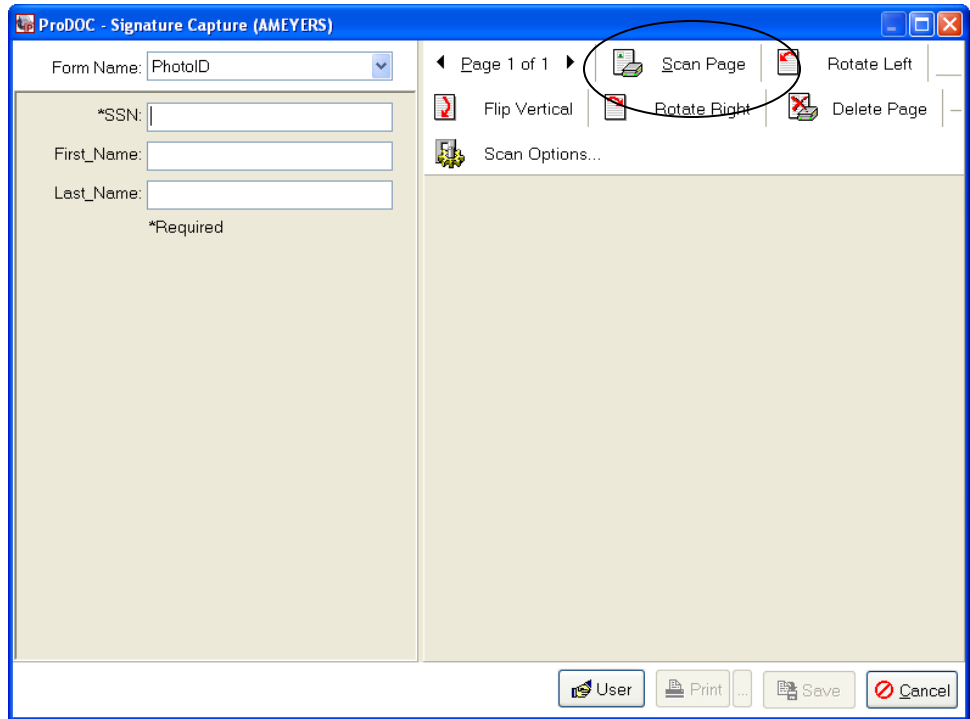
Try the other side!

Always scan the identification face down, head first, aligned to the right.

Do not scan the license through the scanner face up.

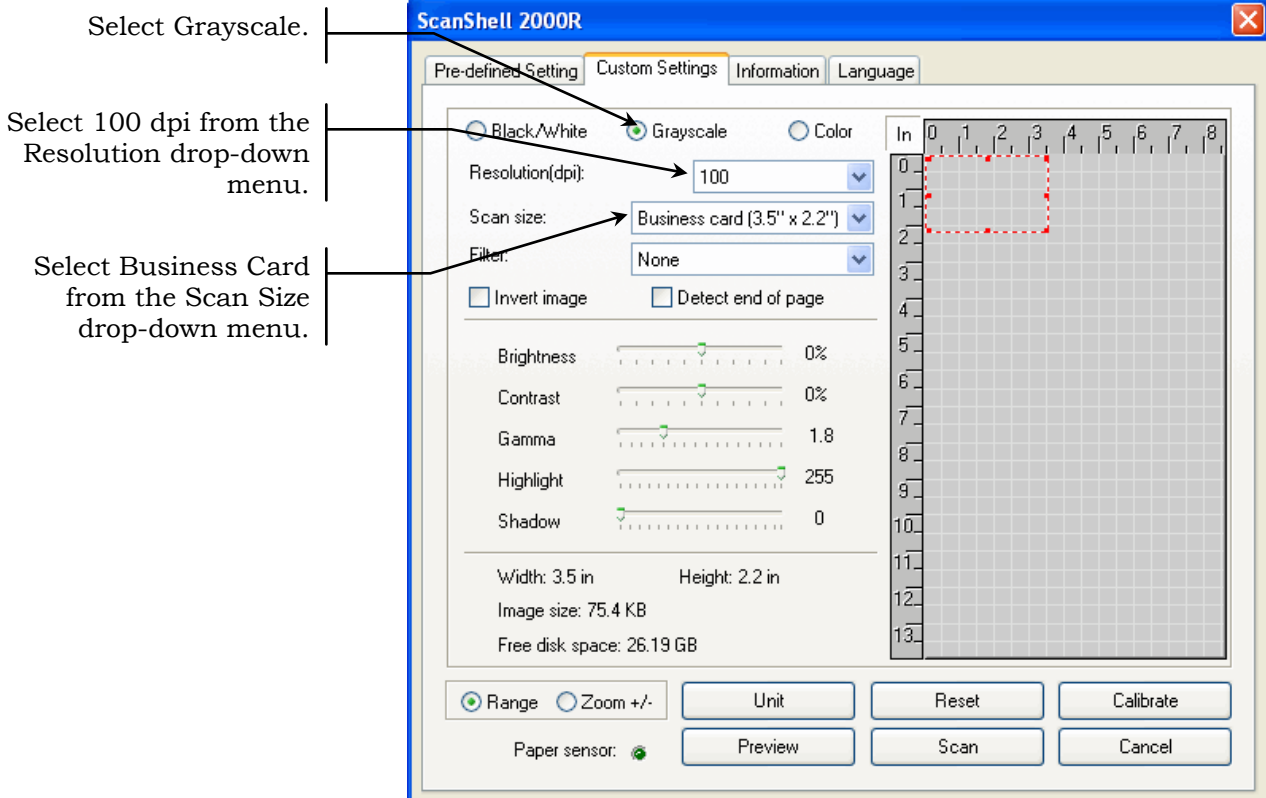
CU*TIP: To scan a minor's vertical or student ID, scan it **long side** first since the license photo is along the vertical side. That way the photo ID will scan into the database correctly.

4. Click Scan Page.



5. Ensure that the following custom settings are correct. These may or may not hold from scan to scan.

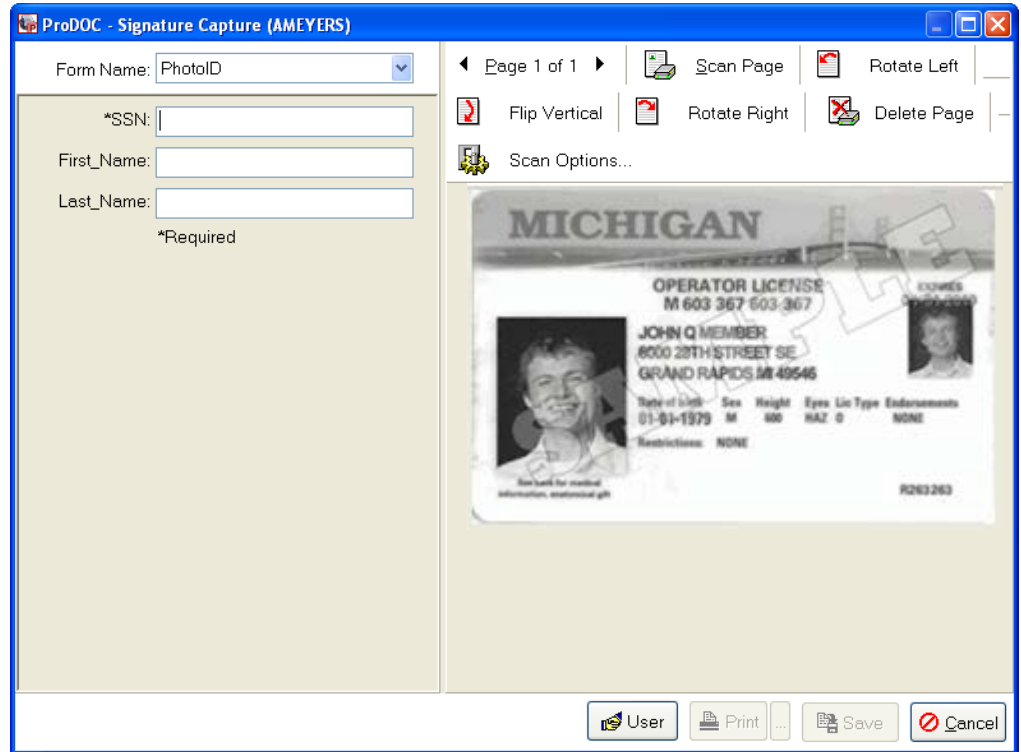
Custom Settings for Scan



6. Click Scan.

7. The following image will appear.

Scanning an ID "Photo ID is Scanned"



7. Enter the member's First Name, Last Name and Social Security Number.

*Enter the social security number with or without dashes.
The software will remove the dashes before saving the number in the database.*

8. Click Save.

9. The photo ID is now saved in the database.

RECORDING IN CU*BASE THAT A PHOTO ID IS SCANNED

Now that the Photo ID is scanned, you will need to indicate this change in the Secondary names screen. Check the “Photo ID on File” box at the top of the screen to indicate that a member’s ID has been scanned. Check the the “ID on File” box in middle of the screen to indicate that an ID has been scanned for a person who is secondary on the account. If a person is secondary on more than one sub account, you only need to check one “ID on File” box for that person. In the example below, you would only need to check one “ID on File” checkbox for William H Member. Upon update of the screen, all three boxes will be updated.

The Secondary Names button can be found on the Verify ID Screen (leads into Main Teller Posting) and the Member Inquiry, or Phone Inquiry screens.

Session 0 CU*BASE GOLD - Secondary Names Inquiry

Secondary Names Inquiry Individual

Account # 6 SSN/TIN 6 Photo ID on file

Name SALLY K MEMBER DBA TEST DBA NAME

Name	SSN/TIN	Birth Date	Type	Joint Owner	Benef	Add'l Signer	ID On File
AMANDA R MEMBER	8	Feb 13, 1903	000	X			<input checked="" type="checkbox"/>
WILLIAM H MEMBER	6	Jan 09, 1934	000	X			<input checked="" type="checkbox"/>
WILLIAM H MEMBER	6	Jan 09, 1934	605			X	<input checked="" type="checkbox"/>
WILLIAM H MEMBER	6	Jan 09, 1934	811			X	<input checked="" type="checkbox"/>

Backup F3
Update F5
Sort By Acct Type F14
Only Joint Owners F17
Only Beneficiaries F18
Only Add. Signers F19

The ID on File flag can be set only on a member or non-member record. This flag isn't available if a Secondary Name doesn't have a link to a member or non-member record. See Update Membership info to correct the joint owner link.

FR (4420) 3/13/12 16:02:26 [Learn About This Feature](#)


- NOTE: You can also indicate an ID is scanned while opening or updating a membership. A checkbox also exists in the screen used to update non-member information.

LOGGING OUT OF ProDOC

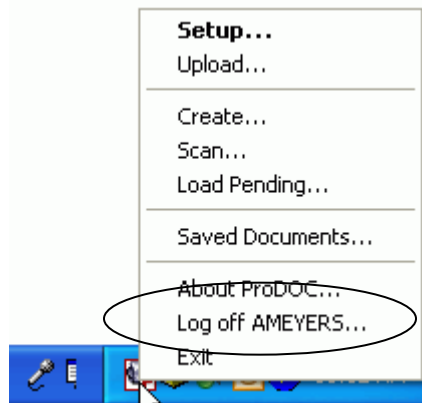
Always log out of ProDOC when you log out of CU*BASE.

Logging Out During the Day

Log out of ProDOC using these directions so that a login screen will appear on the workstation and remind the next teller that he or she needs to log on to ProDOC before processing any transactions.

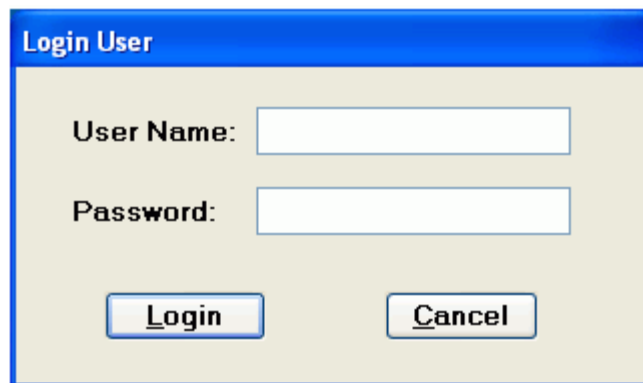
1. When you log out of CU*BASE, right click on the ProDOC icon  (in the Systems Tray) and select Log off.

Selecting Logoff from the ProDOC Icon



2. The following screen will appear.

Login Screen

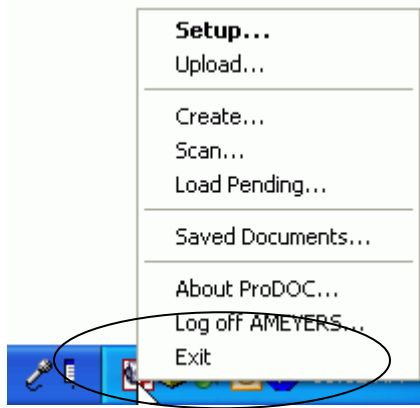


3. Now another teller can log into ProDOC by entering his or her login information and clicking Login.

Logging off of ProDOC at the End of the Day

1. To log off of ProDOC at the end of the day, simply right click on the ProDOC icon in your system tray and select Exit.

Selecting Exit at the End of the Day



2. ProDOC will close completely.

RETRIEVING ELECTRONIC PHOTO IDS

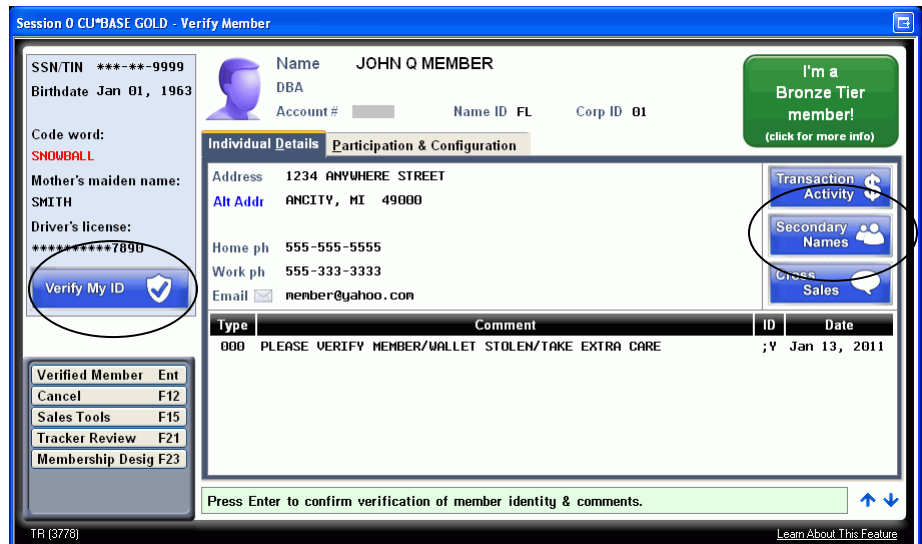
Once the photo ID is scanned into the database, it can be retrieved, viewed, and printed at a later date.


Use the Verify ID button in the CU*BASE Teller Funds In screen to view and print photo identification. The same button is also available in the Phone Inquiry and Member Inquiry screens.

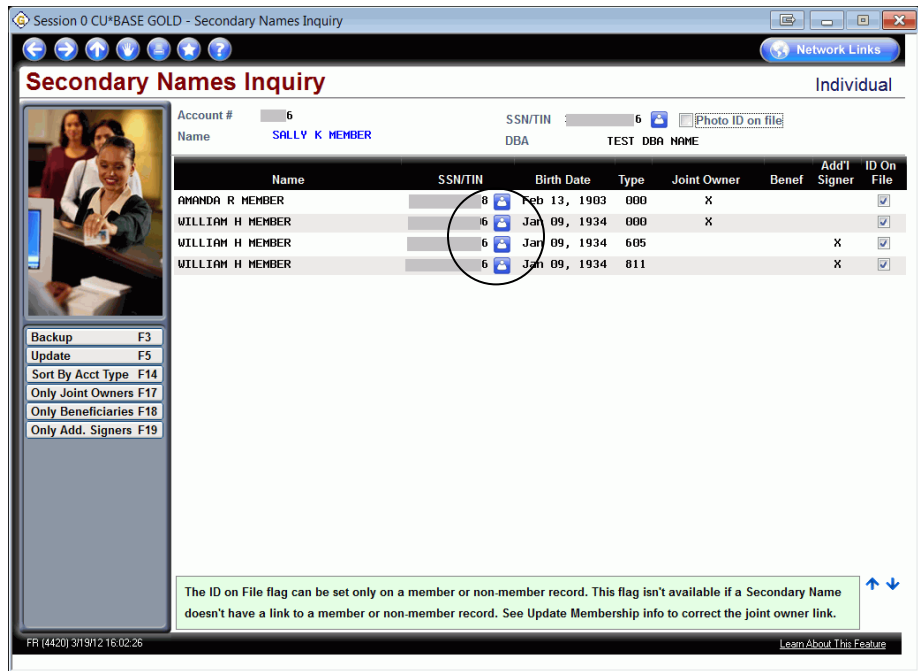
VIEWING AND PRINTING A PHOTO ID THAT HAS BEEN SCANNED

1. To view the photo ID of a member, joint member or beneficiary, click the Verify My ID button or the Secondary Names button as shown below.
 - NOTE: The Verify My ID button will be blue if a Photo ID is currently available. If none exists the button will be red and read "No ID on File."

These buttons can be found on the Verify ID Screen (leads into Main Teller Posting) and the Member Inquiry, or Phone Inquiry screens.

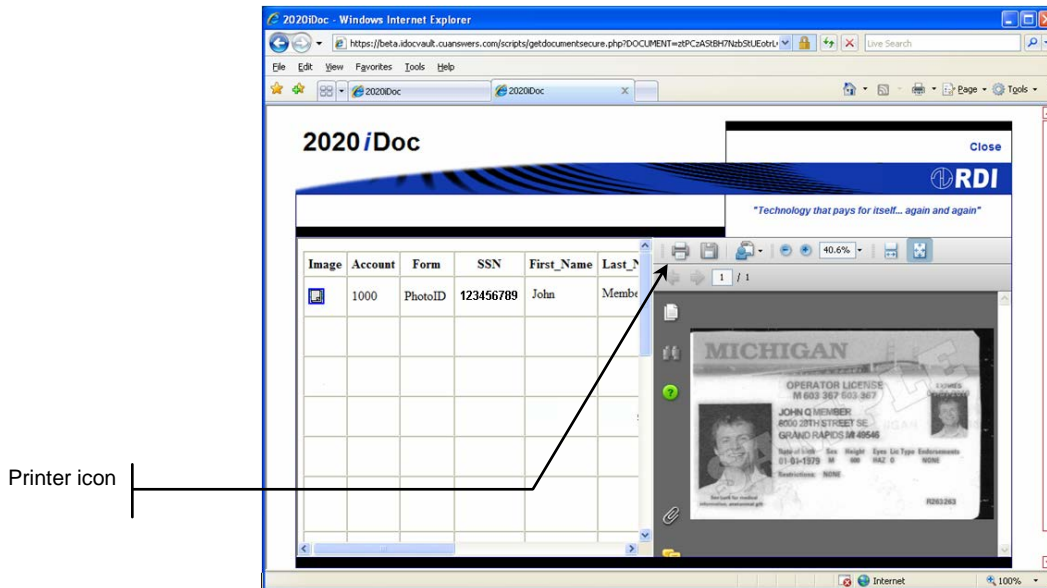


2. The following screen will appear. To view the photo ID of a member, joint member, or beneficiary, click on the  icon in front of the name.



4. A new browser window will open showing the photo ID.



2020iDOC Photo ID View



3. To print a copy of the photo ID, click on the printer icon. Select a non-receipt printer, such as one you would use for reports.
4. Click Print. The photo ID will print to that printer.

ELECTRONIC PHOTO ID "QUICK REFERENCE"

This page is designed to be a quick reference for scanning and viewing electronic photo IDs. Refer to previous pages for details.

<p>Logging into ProDOC</p>	<p>A login screen will appear when you log on to your computer. Enter your login information and click Login. Also log in to CU*BASE and your thermal printer session.</p> <p>Once you have logged in a ProDOC icon will appear in your System Tray.</p> <p>If you need to log into ProDOC after you have logged into your computer, use the icon on your desktop</p>
<p>Scanning and Saving the Electronic Photo ID</p>	<ol style="list-style-type: none"> 1. Right click on the ProDOC in your System Tray  and select Scan. 2. Select Photo ID from the drop-down menu next to Form Name. 3. Place your photo ID on the scanner. <p style="text-align: center;"><i>Always scan adult licenses face down, head first. Align the identification with the right hand side of the scanner.</i></p> <ol style="list-style-type: none"> 4. Click Scan Page. 5. Select Grayscale, 100 dpi, and a Scan Size of Business Card 6. Click Scan. 7. Enter the member's information. 8. Click Save.
<p>Printing a Receipt after a Photo ID has been scanned</p>	<ol style="list-style-type: none"> 1. Post a transaction in the normal manner. 2. Select the Form Name of "Receipt" so that the signature field appears. 3. Continue to process the receipt in the normal manner.
<p>Viewing and Printing an Electronic Photo ID once the ID has been scanned</p>	<ol style="list-style-type: none"> 1. Go to the Teller Funds in, Member Inquiry, or Phone Operator screens. 2. Click on the Verify My ID button or Secondary Names button. 3. To view the photo ID of a member, joint member, or beneficiary, click on the  icon in front of the name. 4. A new browser window will open showing the photo ID. 5. Click the Printer icon 6. Select a non-receipt printer, such as one that you use for reports. 7. Click Print.