

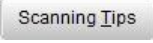
IDscan Quick Start Guide

Introducing an exclusive new feature to The Conveyancer®, IDscan technology. This new feature allows for the verification and storage of client identification images within The Conveyancer.



With Conveyancer’s IDscan functionality, you now have the ability to verify the information on the front of a driver’s licence and provincial photo card with the information contained in the corresponding barcode on the reverse of these two forms of ID. IDscan will also save you valuable time and increase accuracy by importing the information contained in the driver’s license, into the Identification Verification Form. It will bring you one step closer to fraud prevention by detecting discrepancies on the front of the driver’s licence or photo card with the information contained in the barcode.

With the Client Identification Storage, you will have the ability to store and manage all of your clients’ identification directly within the record, paperlessly.

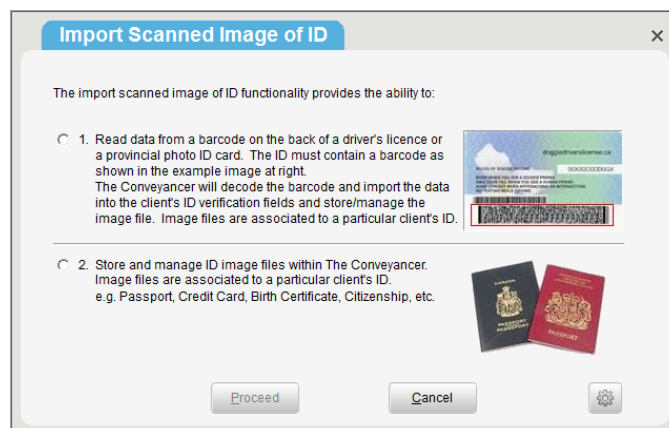
Scanning and Saving Client Identification in The Conveyancer

To begin, scan the front and back of the client’s ID with a scanner. Images can be saved as BMP, PNG, GIF, JPG, TIF or PDF (if scanning a PDF, do not use the scanner’s “compact” setting). Save the images to a designated \tcwin folder such as: \tcwin\@DL images. The process your firm follows is entirely up to you. For Scanning Tips click  at the bottom of the Barcode Reader page.

Importing Scanned ID

To import a driver’s licence or photo card, open the applicable transaction record. In Tab B, enter the client’s name, click  next to the client’s field, and select Edit. When you click  next to the Name on ID field, the next step depends on the data appearing in the Type field:

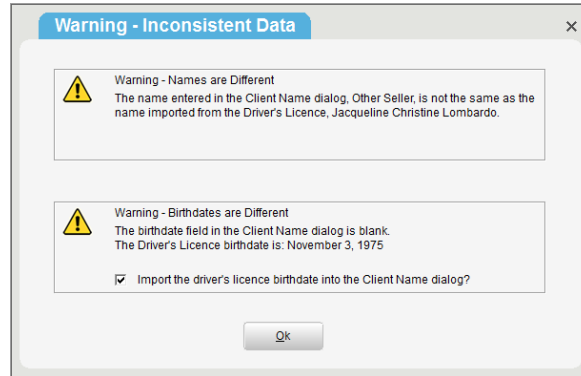
- If the field is empty, the Import Scanned Image of ID box appears. You can choose the barcode reader to import a driver’s licence or photo card or you can store and manage a secondary piece of ID associated to a particular client.
- If the field contains a driver’s licence or photo card, IDscan automatically opens. If the field contains an ID type other than a driver’s licence or photo card, the Import Scanned Image screen automatically appears for storing and managing ID.




Importing a Scanned Drivers Licence or Photo Card

In the IDscan screen, select the image to import by double clicking or selecting the image and clicking **Read Barcode**. The image will appear with the Extracted Barcode Data displayed at the bottom of the screen.

Select **Proceed to Import (F2)** to import this information into the record. If there are inconsistencies in the names and/or birth dates, a Warning – Inconsistent Data, will appear with an option to import the driver’s licence or photo card birthdate into the Client Name dialog. You then have the option to import the front side of the driver’s licence or photo card by selecting the appropriate image.



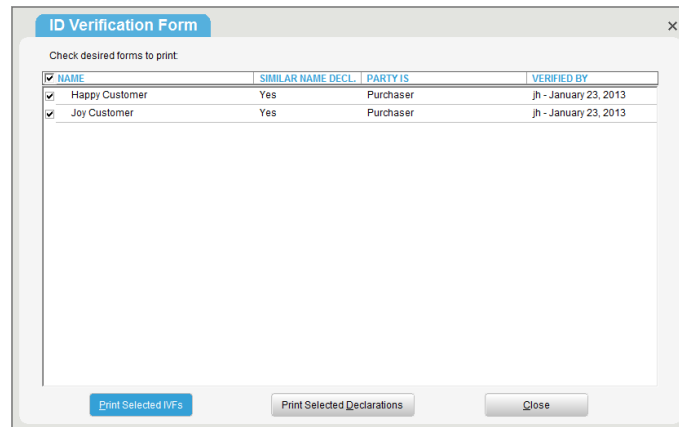
Storing and Managing Secondary ID Images


To store and manage a secondary ID image file within The Conveyancer, the secondary ID information must first be completed, such as ID type, number, place of issue etc. Once all information has been entered select  next to the Name on ID field, select no. 2 > proceed. In the Import Scanned Image screen, select the image to be imported and click **Proceed to Import (F2)**.

Declaration re: Name

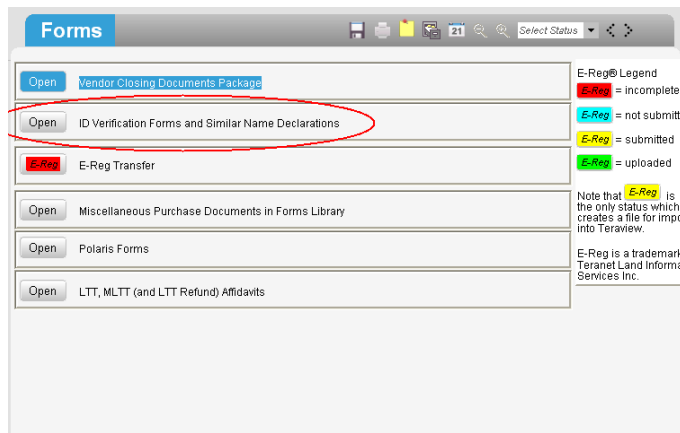
If a Warning - Inconsistent Data appeared on the import of the identification, you are now able to complete a Statutory Declaration Re: Name. This declaration is accessed in Tab B by selecting **ID > Print >** selecting the checkbox for the required individuals in the ID Verification Form and

clicking **Print Selected Declarations**. Note that if the declaration is required, Yes, will appear for the individual in the Similar Name Decl. column in the ID Verification Form box.



This Declaration is not editable; it can be printed by clicking  on the top toolbar.

This declaration and the ID Verification forms can also be accessed from the Forms tab.



Configuring Related Settings

To set options related to saving and managing image files and optimizing image files, log in as the Default user and select Configuration > ID Image Files.

