If you have a TWAIN-compliant scanner, Prevail allows you to scan directly on the History or Medical tab for a prospect or matter.

1. Navigate to the correct matter.

2. To scan on the *History* tab, click 'Add' to open a new History entry. Then, click on the scanner button, located in the bottom right corner of the History entry window.

3. To scan on the *Medical* tab, double-click on the entry for the medical provider from whom you have received records. Then, click on the scanner button, located on the top line of the *Medical Entry* window.

4. A *Select Source* window displays, listing all of the TWAIN-compliant devices to which your computer is either directly connected or connected via network. Click once on the appropriate scanner source, and then click 'Select'. If your scanner is listed twice, choose the one that begins with the TW prefix.

5. Your scanning software will launch. Adjust the settings for the document or picture to be scanned, if necessary, and then click 'Start' or 'Scan' (depending on your scanning interface).

6. 6) A *Reading from the device* window will display throughout the scanning process, indicating the progress of the scan.

7. When the scan is complete, a Prevail window will prompt you to indicate whether there are additional pages to scan, or if you are finished. Click on the appropriate button in this window.

8. Your scanned image will automatically display as an Adobe PDF file. After viewing, you may close the PDF file. It is *not* necessary to save the file, as Prevail has already automatically saved it for you in the correct location.

9. If you scanned from the *History* tab, a new History entry window appears, with the scanned image file name displayed in the *File* field at the bottom. At this point, complete any other desired information in the *History* entry, and then click 'Save'. Please note that you are *required* to enter a subject for the new entry in the "Subject" field.

10. If you scanned from the *Medical* tab, Prevail automatically creates and saves the *History* entry for you, with "Scanned Document" in the "Subject" field.

11. To view the scanned image in the future, click on the appropriate *History* entry, and then click on 'View'.