

# Patient Document

Patient document consist of essential medical records, treatment plans, and progress notes. These documents track the patient's health history, medications, diagnoses, and care schedules.

## Uploading Patient Documents

The required documents of the patient can be uploaded in the system by using the option Patient Document.

Client >> List >> Select Patient >> Document

EDIT PATIENT - MICHAEL, DANIEL 61Y 11M MALE / #76491585 / LOCATION: ROCKY MOUNT / STATUS: ACTIVE

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

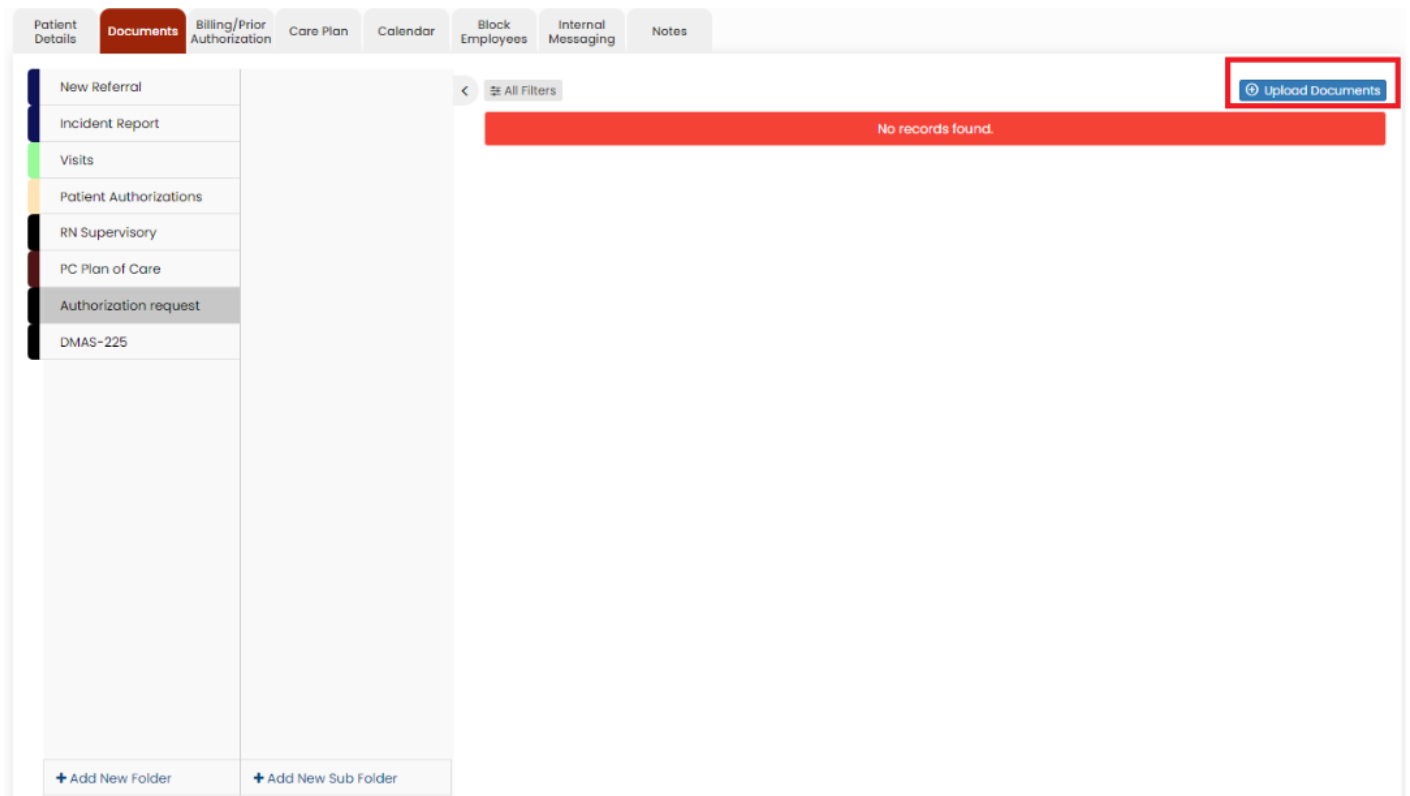
New ReferralIncident ReportVisitsPatient AuthorizationsRN SupervisoryPC Plan of CareAuthorization requestDMAS-225

< All Filters

Upload Documents

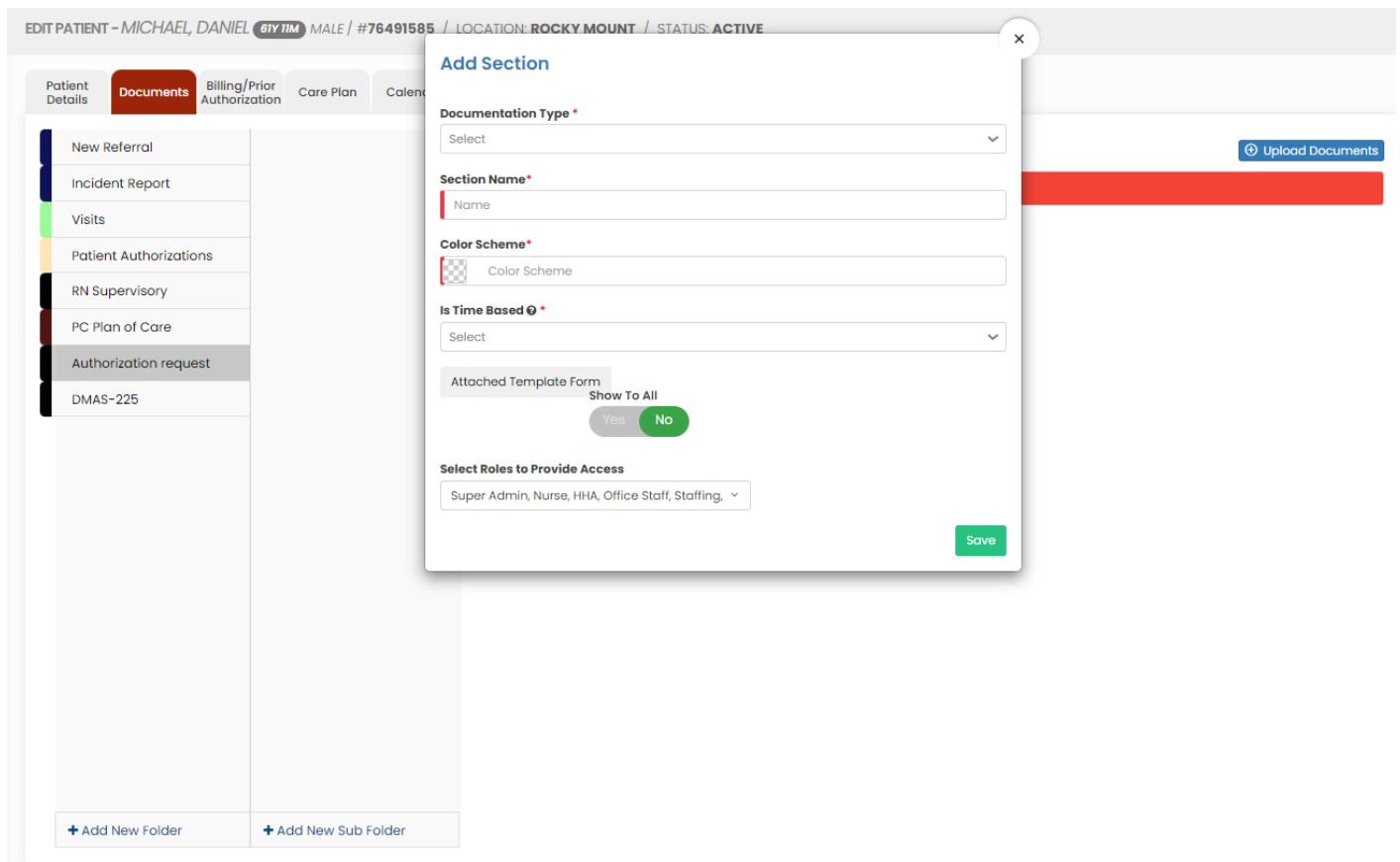
+ Add New Folder+ Add New Sub Folder

Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.

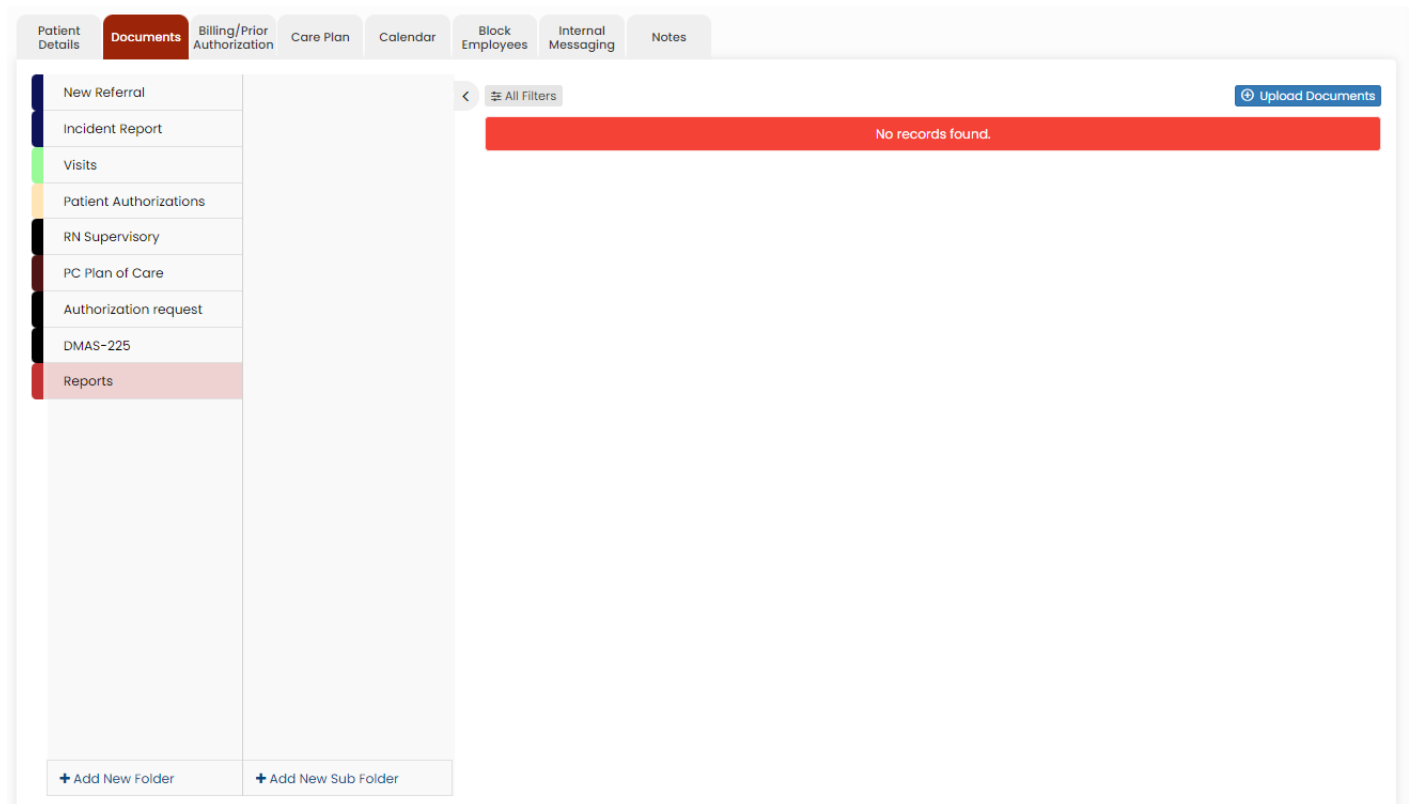


## Adding New Folder

Click + Add New Folder option in Patient document. The following screen appears, update the required information. Also in the option Show to All, if the user needs the folder name to be added for all the patient click Yes option. If the user wants the folder to be added only for the particular patient click No option and click Save.



The folder Documents is added successfully to upload the required documents of the patient.



## Adding New Sub Folder

Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the patient click Yes option. If the user wants the folder to be added only for the particular patient click No option and click Save.

The screenshot shows a web application interface with a sidebar on the left containing a list of document types: New Referral, Incident Report, Visits, Patient Authorizations, RN Supervisory, PC Plan of Care, Authorization request, DMAS-225, and Reports. The 'Documents' tab is selected at the top. A modal dialog titled 'Add Sub Section' is open in the center. It contains the following fields and options: 'Documentation Type' (a dropdown menu), 'Sub Section Name' (a text input field), 'Is Time Based' (a dropdown menu), and 'Attached Template Form' (a section with a 'Show To All' toggle set to 'No'). Below these is a 'Select Roles to Provide Access' dropdown menu. A green 'Save' button is at the bottom right of the dialog. In the background, a document upload area is visible with an 'Upload Documents' button and a red bar.

The Sub folder 2023 is now added under folder name Reports to upload the required documents of the Patient.

Patient Details

Documents

Billing/Prior Authorization

Care Plan

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Notes

New Referral

Incident Report

Visits

Patient Authorizations

RN Supervisory

PC Plan of Care

Authorization request

DMAS-225

Reports

2023

< All Filters

No records found.

+ Add New Folder

+ Add New Sub Folder

Upload Documents

Revision #1

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