

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.

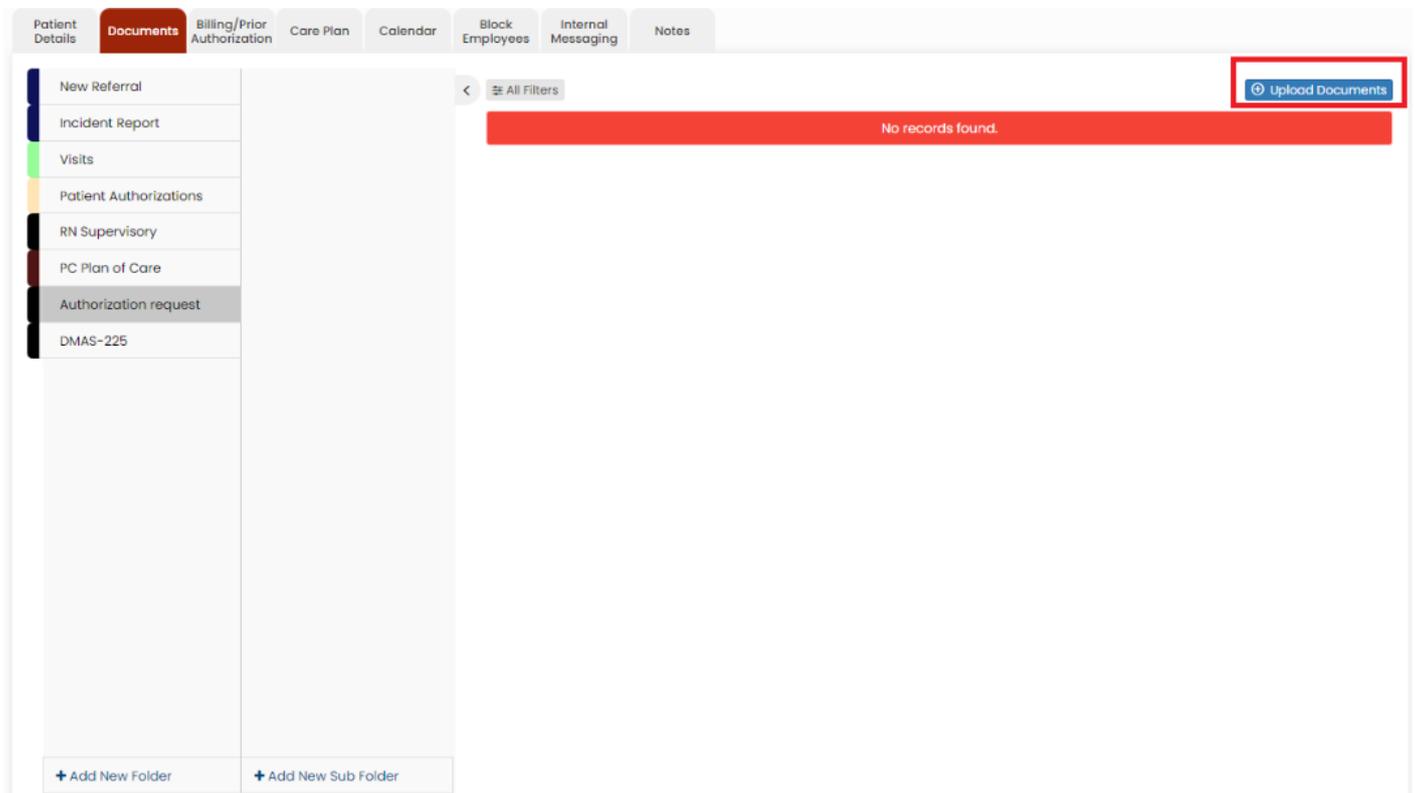
Uploading Patient Documents

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

Client >> List >> Select Patient >> Document

The screenshot shows a patient profile page for Michael Daniel (61Y 11M, MALE, #76491585) located in Rocky Mount, with an active status. The 'Documents' tab is selected, showing a list of document types: New Referral, Incident Report, Visits, Patient Authorizations, RN Supervisory, PC Plan of Care, Authorization request, and DMAS-225. An 'Upload Documents' button is visible in the top right corner of the document list area. At the bottom, there are buttons for '+ Add New Folder' and '+ 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.

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

Patient Details Documents Billing/Prior Authorization Care Plan Calendar

- New Referral
- Incident Report
- Visits
- Patient Authorizations
- RN Supervisory
- PC Plan of Care
- Authorization request
- DMAS-225

+ Add New Folder + Add New Sub Folder

Add Section

Documentation Type *
Select

Section Name *
Name

Color Scheme *
Color Scheme

Is Time Based *
Select

Attached Template Form
Show To All
Yes No

Select Roles to Provide Access
Super Admin, Nurse, HHA, Office Staff, Staffing, v

Save

Upload Documents

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

Patient Details Documents Billing/Prior Authorization Care Plan Calendar Block Employees Internal Messaging Notes

- New Referral
- Incident Report
- Visits
- Patient Authorizations
- RN Supervisory
- PC Plan of Care
- Authorization request
- DMAS-225
- Reports

< All Filters

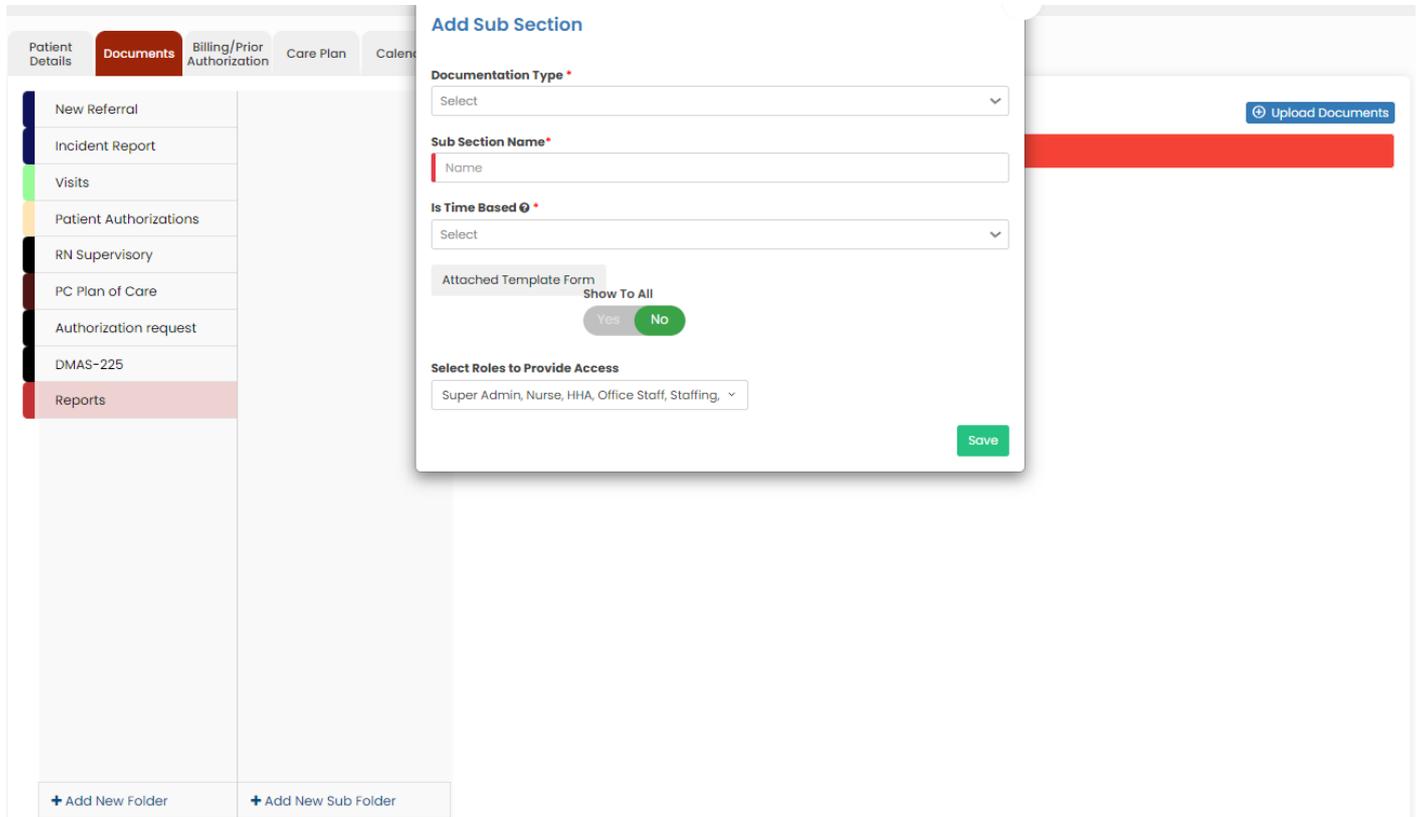
No records found.

Upload Documents

+ Add New Folder + Add New Sub Folder

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

Navigation tabs: Patient Details, **Documents**, Billing/Prior Authorization, Care Plan, Calendar, Block Employees, Internal Messaging, Notes

Left sidebar menu:

- New Referral
- Incident Report
- Visits
- Patient Authorizations
- RN Supervisory
- PC Plan of Care
- Authorization request
- DMAS-225
- Reports

Main content area:

2023 < All Filters [Upload Documents](#)

No records found.

Footer: + Add New Folder + Add New Sub Folder

Revision #1

Created 8 November 2023 17:11:54 by Thamarai

Updated 8 November 2023 17:11:54 by Thamarai