

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.

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

+ Add New Folder + Add New Sub Folder

< All Filters

No records found.

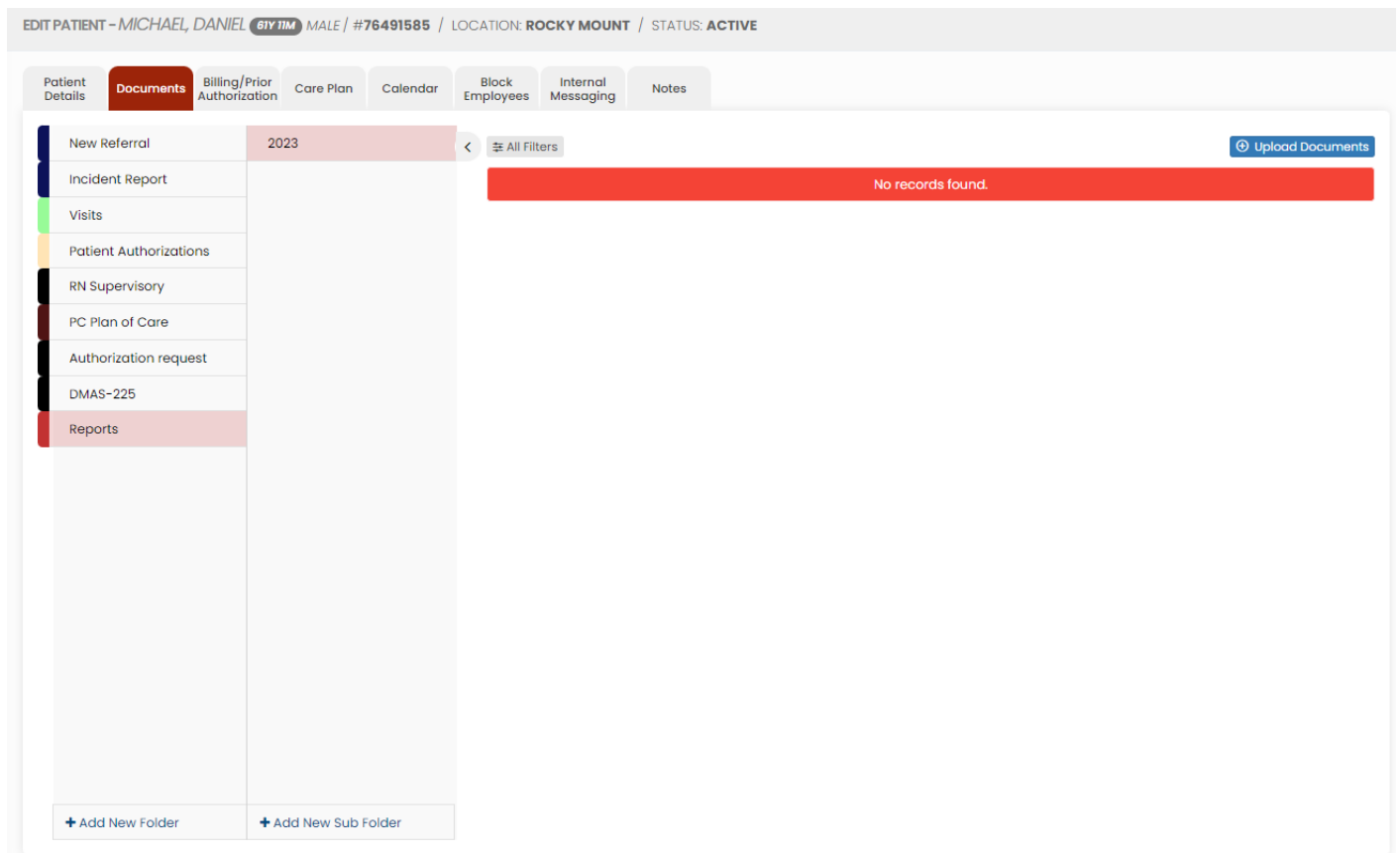
Upload Documents

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 menu on the left and a main content area on the right. The sidebar menu includes tabs for Patient Details, Documents (selected), Billing/Prior Authorization, Care Plan, and Calendar. Under the Documents tab, there is a list of folders: New Referral, Incident Report, Visits, Patient Authorizations, RN Supervisory, PC Plan of Care, Authorization request, DMAS-225, and Reports (highlighted in red). At the bottom of the sidebar, there are two buttons: '+ Add New Folder' and '+ Add New Sub Folder'. The main content area shows a red bar with an 'Upload Documents' button. Overlaid on the interface is a modal dialog box titled 'Add Sub Section'. The dialog box contains the following fields and options: 'Documentation Type' (a dropdown menu with 'Select' as the current value), 'Sub Section Name' (a text input field with 'Name' as the placeholder), 'Is Time Based' (a dropdown menu with 'Select' as the current value), 'Attached Template Form' (a section with a 'Show To All' toggle switch set to 'No'), and 'Select Roles to Provide Access' (a dropdown menu with 'Super Admin, Nurse, HHA, Office Staff, Staffing,' as the current value). A green 'Save' button is located at the bottom right of the dialog box.

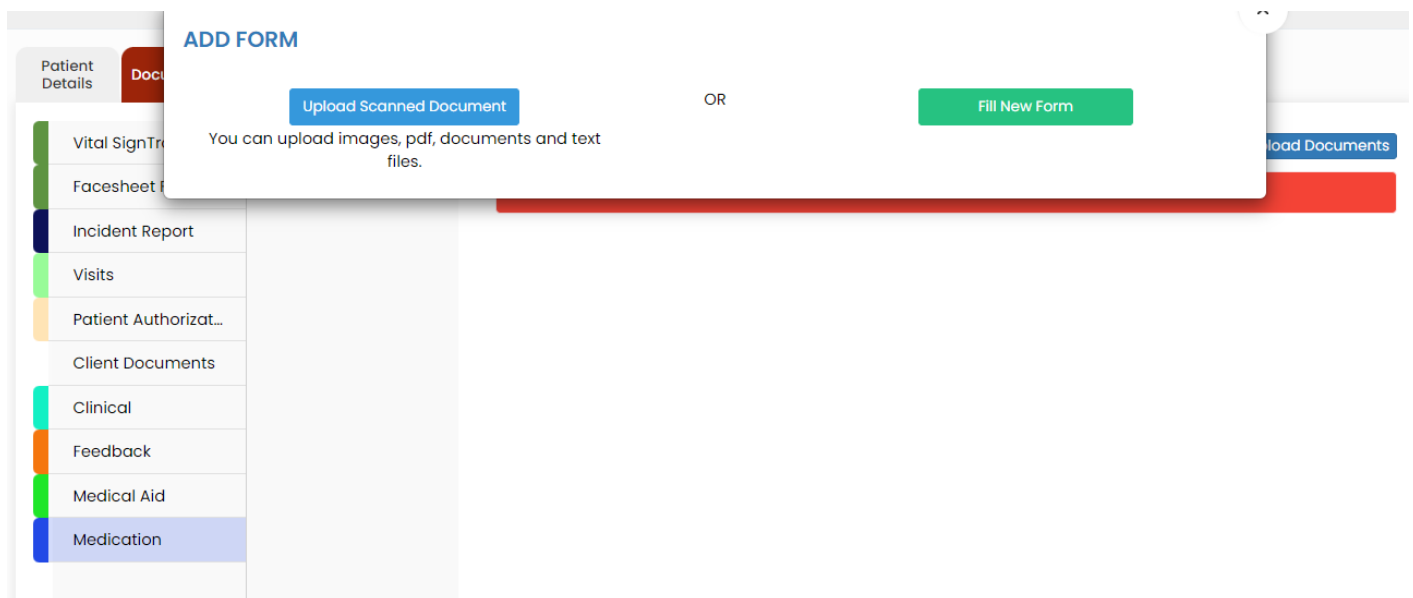
The Sub folder 2023 is now added under folder name Reports to upload the required documents of the Patient.



Uploading Documents

To upload the documents, select the folder name and click Upload documents.

When we click the option Upload Documents, the following screen appears,



The Scanned documents can be uploaded using the option Upload Scanned Document option. The forms in the system can be uploaded using Fill New Form option.

Revision #12
Created 11 October 2023 20:02:37 by Thamarai
Updated 13 May 2024 23:24:38 by Thamarai