

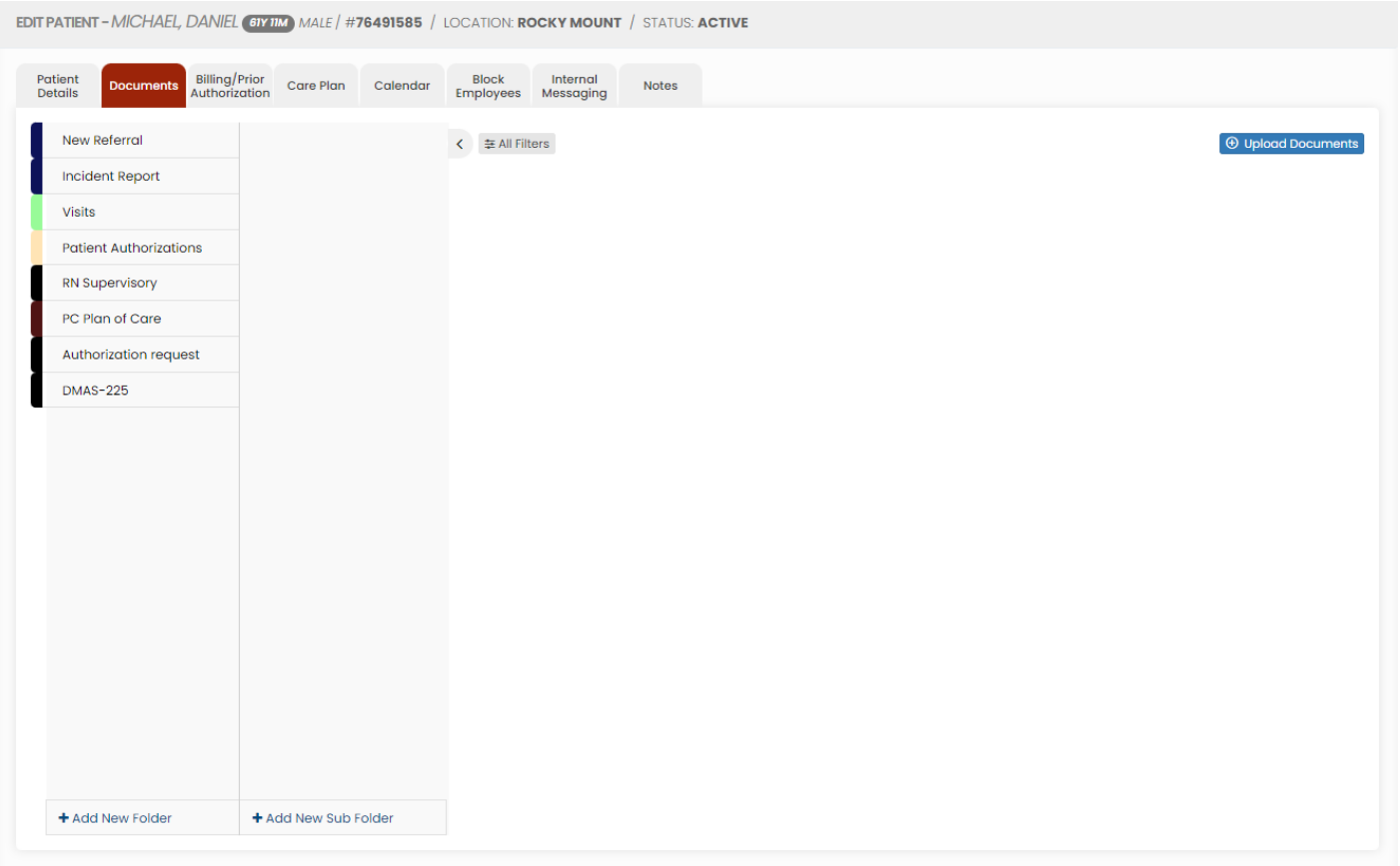
# Patient Document

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**



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.

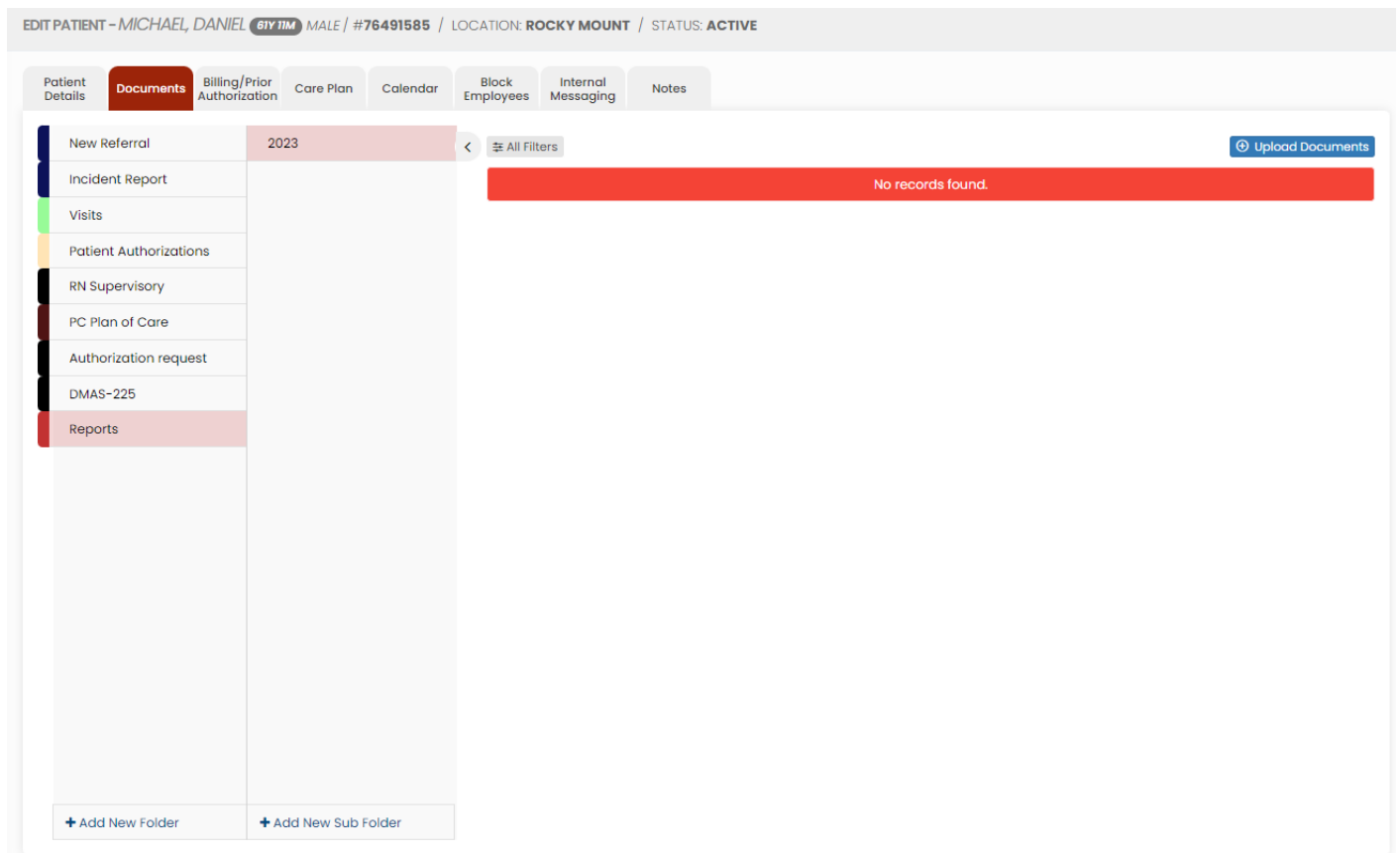
Upload Documents

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 document types: 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 header bar with an 'Upload Documents' button. A modal dialog box titled 'Add Sub Section' is open in the center. It 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.

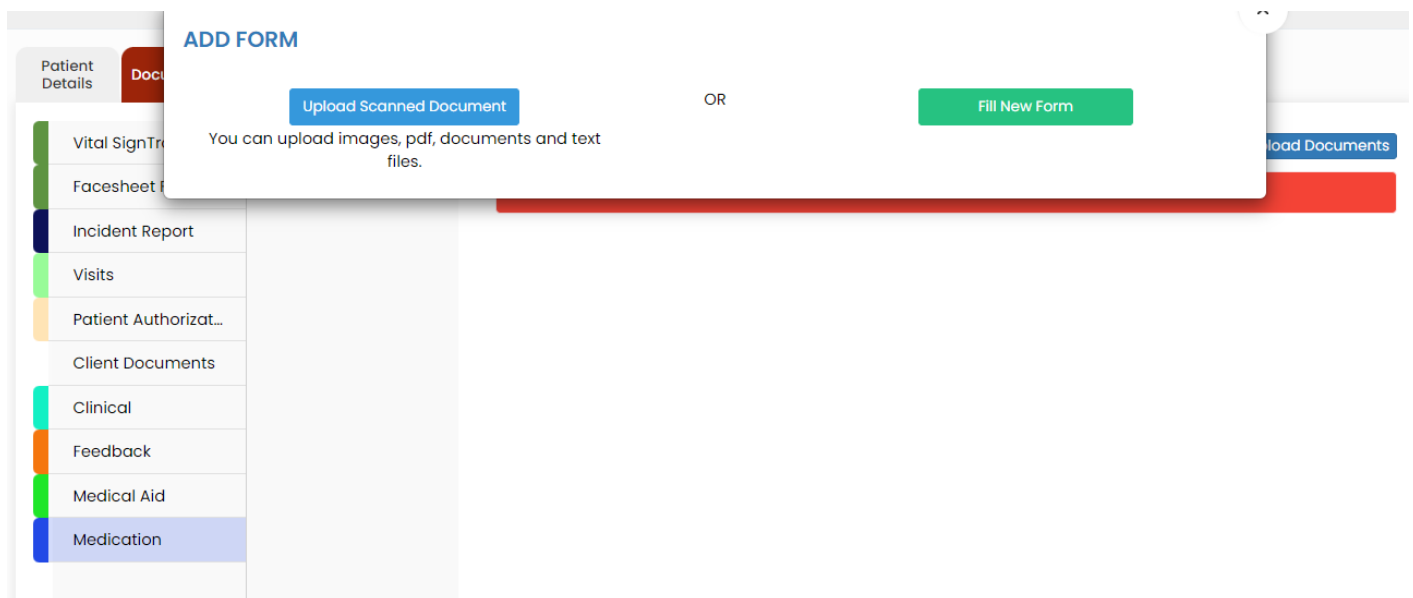
The Sub folder 2023 is now added under folder name Reports to upload the required documents of the Patient.



## 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. The Forms in the system can be uploaded using Fill New Form option.

Under Actions we have the following features for the uploaded document.

EDIT PATIENT - PETER SMITH70Y 11M MALE / #0002 / LOCATION: N/A / STATUS: ACTIVE - SERVICE ON-GOING

Patient DetailsDocumentsBillingCare PlanCalendarBlock EmployeesInternal MessagingNotes

Vital SignTrackingLetter of Motivation<All FiltersUpload Documents

Facesheet FormRequests

Incident ReportAuths

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	HN-IN-DFS	Master Admin	24/05/2024	Master Admin	24/05/2024	Action

Archive

Edit

Clone

Emailbeta

Send for Signaturebeta

Archive option

Click the option Archive to delete the uploaded scanned document. The following pop-up appears. Click Yes Continue option.

EDIT PATIENT - PETER SMITH70Y 11M MALE / #0002 / LOCATION: N/A / STATUS: ACTIVE - SERVICE ON-GOING

Patient DetailsDocumentsBilling

Vital SignTrackingLetter of M

Facesheet FormRequests

Incident ReportAuths

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	HN-IN-DFS	Master Admin	24/05/2024	Master Admin	24/05/2024	Action

Archive

Edit

Clone

Emailbeta

Send for Signaturebeta

Archive

Are you sure you want to Archive this document?

Cancel

Yes, Continue...

The document is now deleted from the Active documents list. To view the deleted document, Click All Filters option and select the Status Archive.

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

Vital SignTracking
Facesheet Form
Incident Report
Visits
Patient Authorizat...
Client Documents
Clinical
Feedback
Medical Aid
Medication

Letter of Motivation
Requests
Auths

All Filters

Document Name
Filter Date
Added Date From

Added Date To
Type
Status

Search
Reset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HN-IN-DFS	Master Admin	24/05/2024	Master Admin	24/05/2024	Action

## Edit Option

Click Edit option to edit the required information in the uploaded forms. Also we can edit the Document name of the uploaded scanned document using the Edit option.

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

Vital SignTracking
Facesheet Form
Incident Report
Visits
Patient Authorizat...
Client Documents
Clinical
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Medical Aid
Medication

Letter of Motivation
Requests
Auths

All Filters

Document Name
Filter Date
Added Date From

Added Date To
Type
Status

Search
Reset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HN-IN-DFS	Master Admin	24/05/2024	Master Admin	24/05/2024	Action

## Email Option

The uploaded scanned document can be sent through Email using the Email option. Click Email option under Actions of the scanned document. The following screen appears, update the Email address, Subject and content of the Email and click Send option. The Email will be sent along with the scanned document.

We can also create templates for the Email under Settings >> Email Template option. The user can use the created email template by using the option Templates in the Email Screen.

EDIT PATIENT - PETER SMITH70Y 11M MALE / #0002 / LOCATION: N/A / STATUS: ACTIVE - SERVICE ON-GOING

Patient Details

Documents

Vital SignTracking

Facesheet Form

Incident Report

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

+ Add New Folder

Send Email

Template: Select Template

From: noreply@myezcare.com

HN-IN-DFS

To: test123@mailinator.com

CC:

BCC:

Subject:

B

I

U

T

Hi,  
Document Attached.  
Thank You

CloseSend

Upload Documents

ed Date

2024

Actions

Action

## Send for Signature option

The user can send the forms in the system to get the Electronic Signature from the Patient by using the option Send for Signature under Actions.

EDIT PATIENT - PETER SMITH70Y 11M MALE / #0002 / LOCATION: N/A / STATUS: ACTIVE - SERVICE ON-GOING

Patient Details

Documents

Billing

Care Plan

Calendar

Block Employees

Internal Messaging

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Vital SignTracking

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Incident Report

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Letter of Motivation

Requests

Auths

All Filters

Upload Documents

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HN-IN-DFS	Master Admin	24/05/2024	Master Admin	24/05/2024	Action

Archive

Edit

Clone

Emailbeta

Send for Signaturebeta



Click the option Send for Signature, the following screen appears, Update the required details and Click Send option.

The screenshot shows a web application interface for editing patient information. At the top, a header bar displays 'EDIT PATIENT - PETER SMITH', '70Y 11M', 'MALE', '#0002', 'LOCATION: N/A', and 'STATUS: ACTIVE - SERVICE ON-GOING'. On the left, a sidebar menu includes 'Patient Details' and 'Documents'. The 'Documents' section is expanded, showing a list of document types: 'Vital SignTracking', 'Facesheet Form', 'Incident Report', 'Visits', 'Patient Authorizat...', 'Client Documents', 'Clinical', 'Feedback', 'Medical Aid' (highlighted in green), and 'Medication'. A modal window titled 'Send Email for Signature' is open in the center. It has a 'Template: Select Template' dropdown at the top right. The 'From' field is set to 'noreply@myezcare.com'. The 'To' field contains 'test123@mailinator.com' with an 'Add recipient' link. The 'Subject' field contains 'Test'. Below the subject field is a rich text editor with buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color (T), and Source Code (<>). The editor content shows a red 'Access Document' button and the text 'Thank You,'. At the bottom of the modal are 'Close' and 'Send' buttons. In the background, on the right, there is a table with columns 'ed Date' and 'Actions', showing a row for '2024' with an 'Action' dropdown.

Now the email will be sent with the Document for signature. When the employee click on the Access Document, the following screen appears. On clicking the Send option, the patient will receive a 5 digit OTP for verification. Once the verification is completed, the Document automatically opens in which the patient can update their signature and save the document.

The screenshot shows a 'Document Access' screen. It has a heading 'Document Access' and a sub-heading 'Document Access'. Below the heading, there is a message: 'We'll send you a one-time password (OTP) to your email address (a\*\*\*\*\*i@myezcare.com). This OTP helps protect your account by adding an extra layer of security. Please check your inbox and enter the OTP below to verify your account.' Below this message, there is a line of text: 'You can send the OTP by clicking the button below.' At the bottom, there is a blue button with a white envelope icon and the text 'Send'.

The Signature updated document will be visible under the folders.

Patient Details

Documents

Billing

Care Plan

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Block Employees

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Vital SignTracking

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