

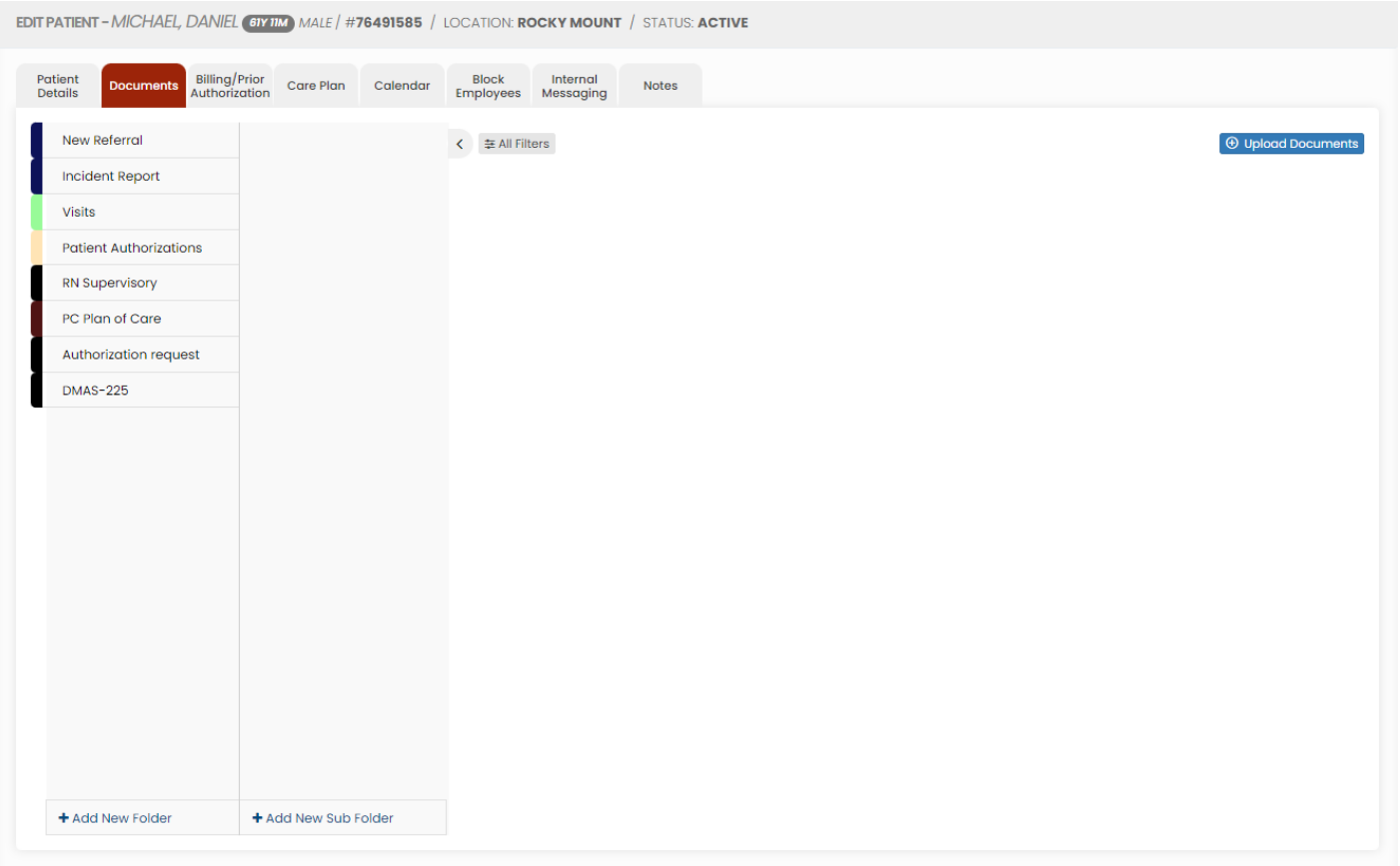
# Patient Document

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**

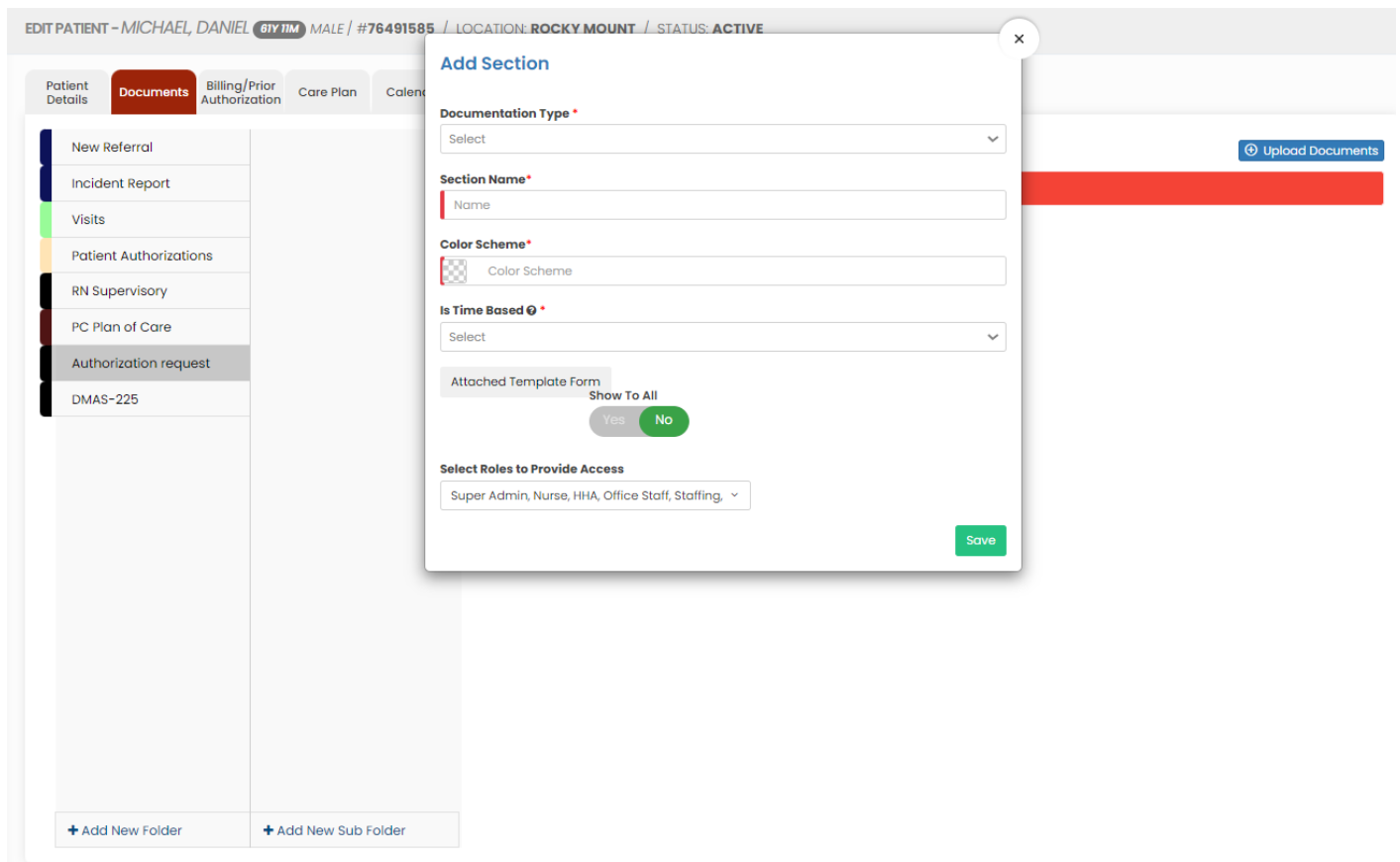


Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.

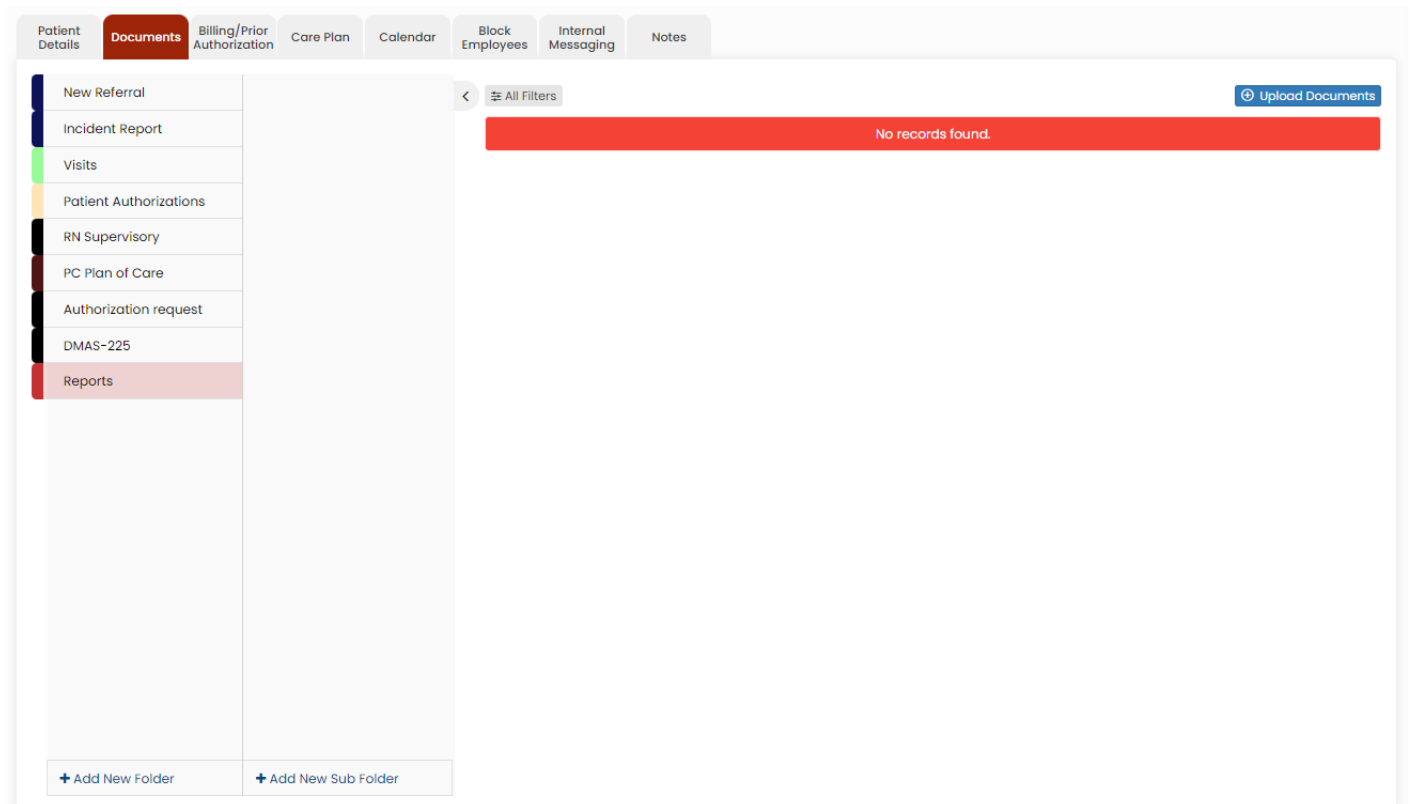


## Adding New Folder

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.



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



## Adding New Sub Folder

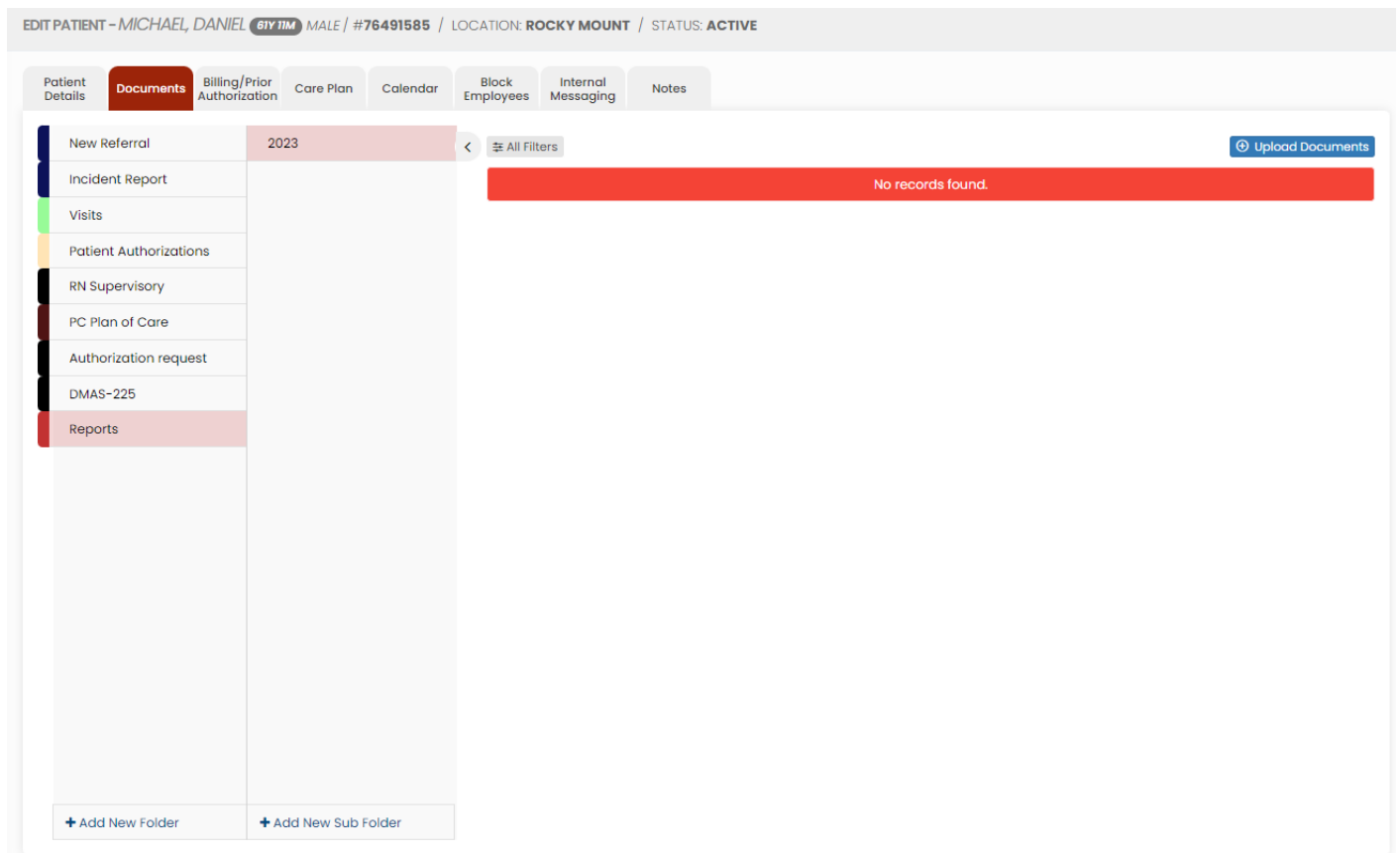
Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the patient click Yes option. If the user wants the folder to be added only 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 controls:

- 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. The 'No' button is currently selected.
- Select Roles to Provide Access**: A dropdown menu with 'Super Admin, Nurse, HHA, Office Staff, Staffing, ' as the selected roles.
- Save**: A green button at the bottom right of the dialog.

At the bottom of the sidebar, there are two buttons: '+ Add New Folder' and '+ Add New Sub Folder'.

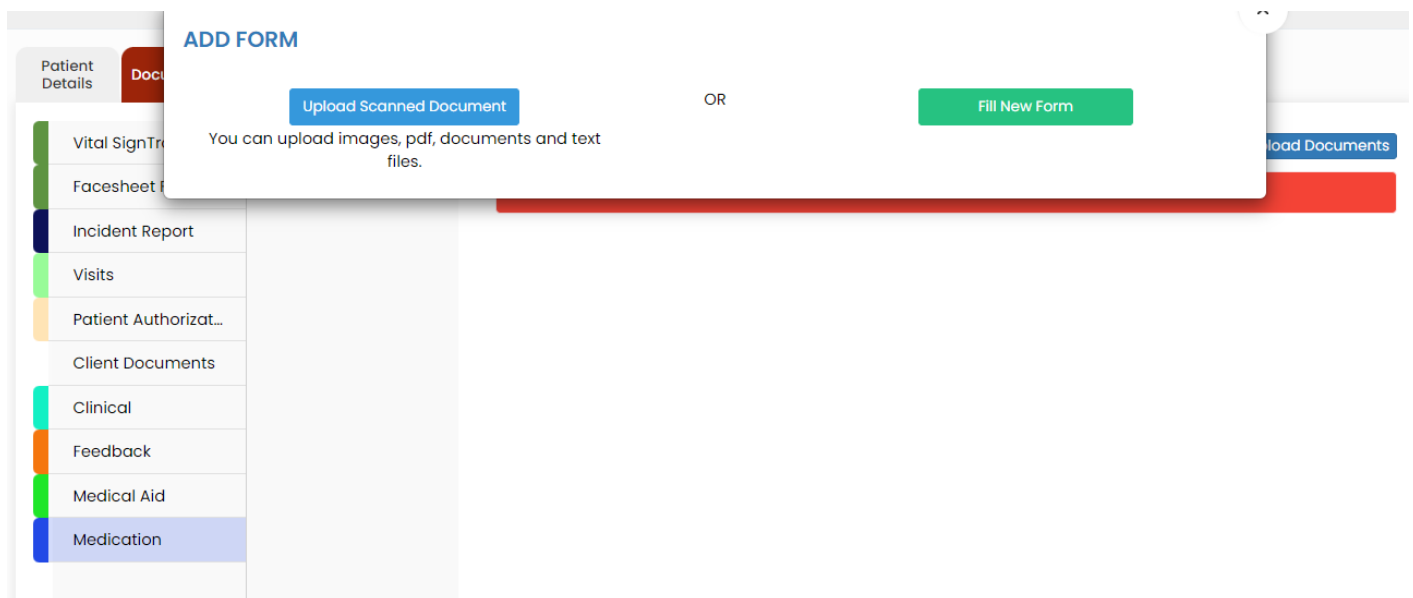
The Sub folder 2023 is now added under folder name Reports to upload the required documents of the Patient.



## 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

Are you sure you want to Archive this document?

CancelYes, Continue...

Upload Documents

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
Letter of Motivation

Facesheet Form
Requests

Incident Report
Auths

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

All Filters
Upload Documents

Document Name
Filter Date
Added Date From

Added Date To
Type
Search Type

Status

Search
Reset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	<span>E</span> 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.

EDIT PATIENT - PETER SMITH

70Y 11M

MALE / #0002

LOCATION: N/A

STATUS: ACTIVE - SERVICE ON-GOING

Patient Details

Documents

Billing

Care Plan

Calendar

Block Employees

Internal Messaging

Notes

Vital SignTracking

Letter of Motivation

<

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	<div>Action</div> <div> <div>Archive</div> <div>Edit</div> <div>Clone</div> <div>Email beta</div> <div>Send for Signature beta</div> </div>

Incident Report

Auths

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

## 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 DetailsDocuments

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 Attach☐ CC to myself

HN-IN-DFS

To: test123@mailinator.com Add recipient

CC:

BCC:

Subject:

B I U

Hi,  
Document Attached.  
Thank You

Close Send

Upload Documents

ed Date

Actions

2024 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 DetailsDocumentsBillingCare PlanCalendarBlock EmployeesInternal MessagingNotes

Vital SignTrackingLetter of Motivation

Facesheet FormRequests

Incident ReportAuths

Visits

Patient Authorizat...

Client Documents

Clinical

Feedback

Medical Aid

Medication

All Filters

#	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

Email beta

Send for Signature beta



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', and a row with the year '2024' and 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' in a large, light blue font. 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, it says '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

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

Name

Sign

Morning Shift

ver

✕ Clear

Night Shift

✕ Clear

CC Sign

✕ Clear

CC Remarks

EMO/OPE/NUR/01 - 2019

+ Add New Folder

+ Add New Sub Folder

Save

Cancel

PDF

Revision #14  
Created 11 October 2023 20:02:37 by Thamarai  
Updated 24 May 2024 18:46:35 by Thamarai