

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.

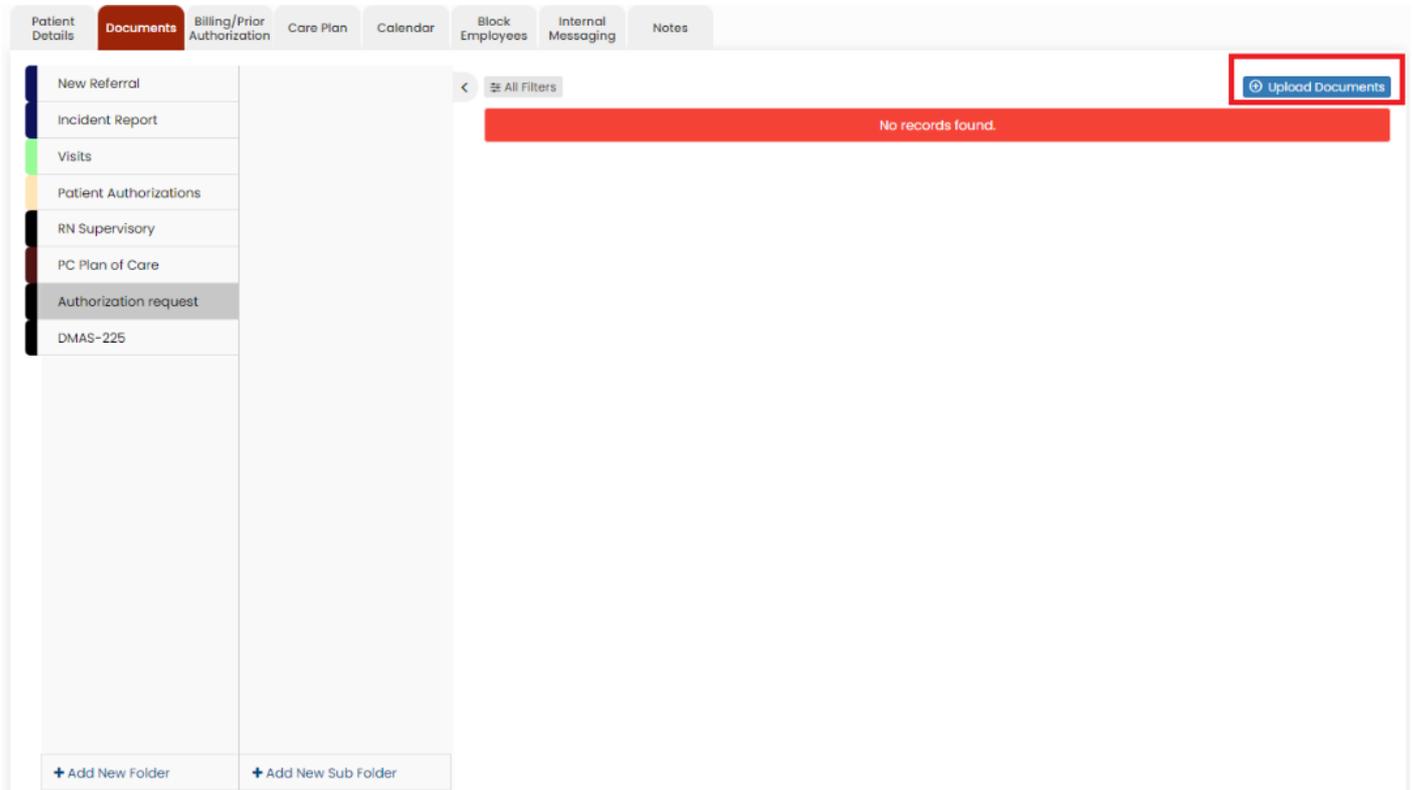
Uploading Patient Documents

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

Client >> List >> Select Patient >> Document

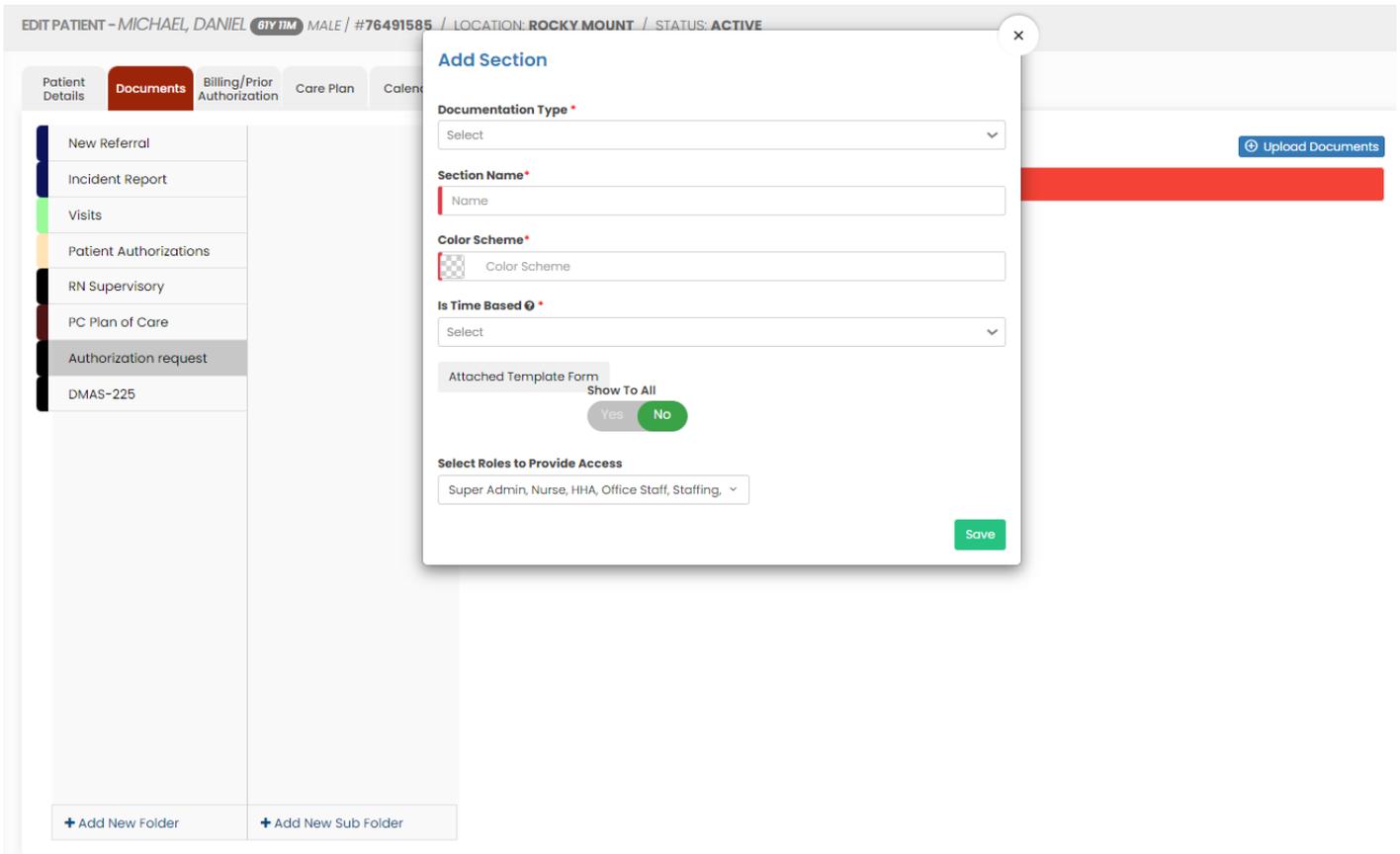
The screenshot shows a web application interface for editing patient information. At the top, it displays 'EDIT PATIENT - MICHAEL, DANIEL' with a gender icon (male), age '61Y 11M', ID '#76491585', location 'ROCKY MOUNT', and status 'ACTIVE'. Below this is a navigation bar with tabs: 'Patient Details', 'Documents' (highlighted in red), 'Billing/Prior Authorization', 'Care Plan', 'Calendar', 'Block Employees', 'Internal Messaging', and 'Notes'. The main content area is a document management interface. On the left is a sidebar with a list of document types: 'New Referral', 'Incident Report', 'Visits', 'Patient Authorizations', 'RN Supervisory', 'PC Plan of Care', 'Authorization request', and 'DMAS-225'. At the bottom of the sidebar are two buttons: '+ Add New Folder' and '+ Add New Sub Folder'. The main area contains a search bar with 'All Filters' and an 'Upload Documents' button in the top right corner.

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.

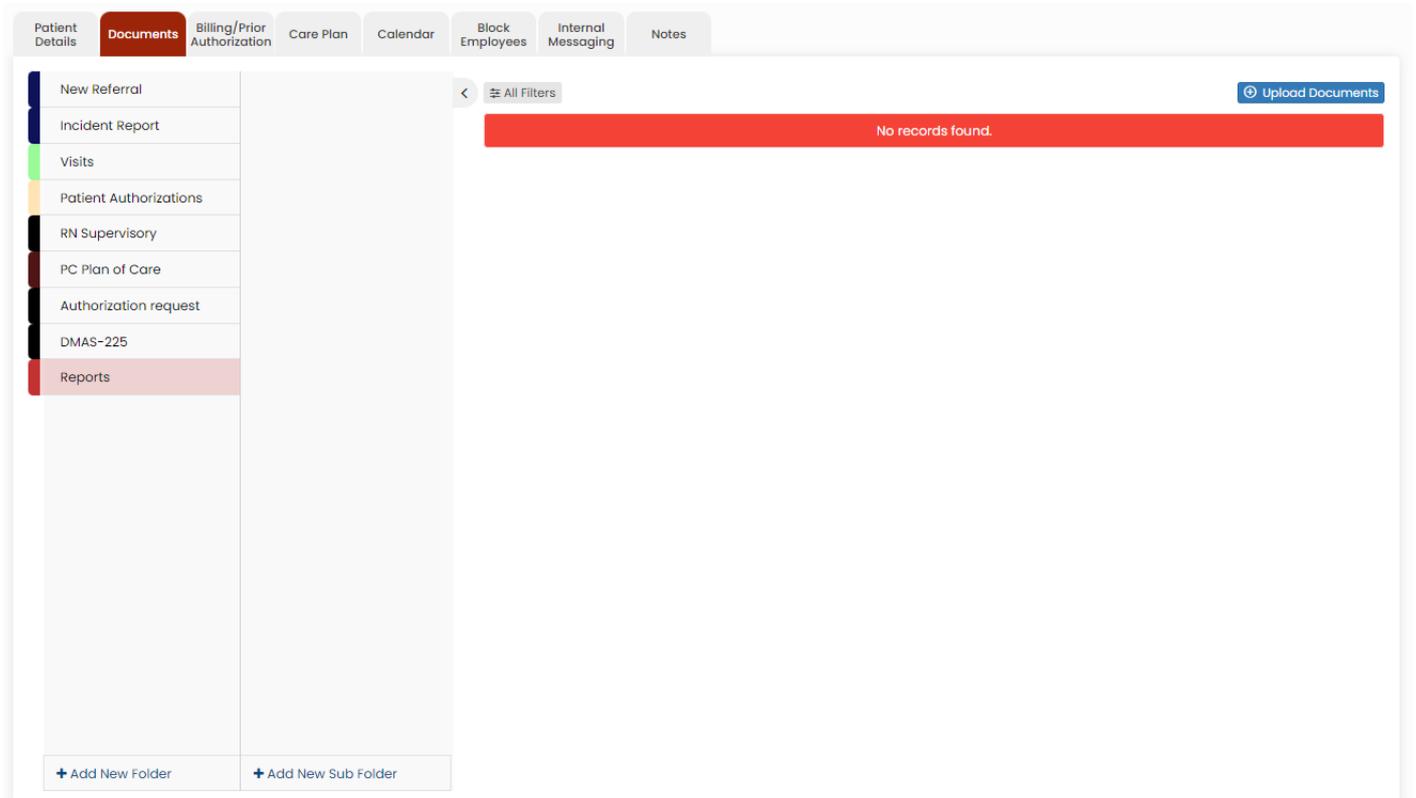


Adding New Folder

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.

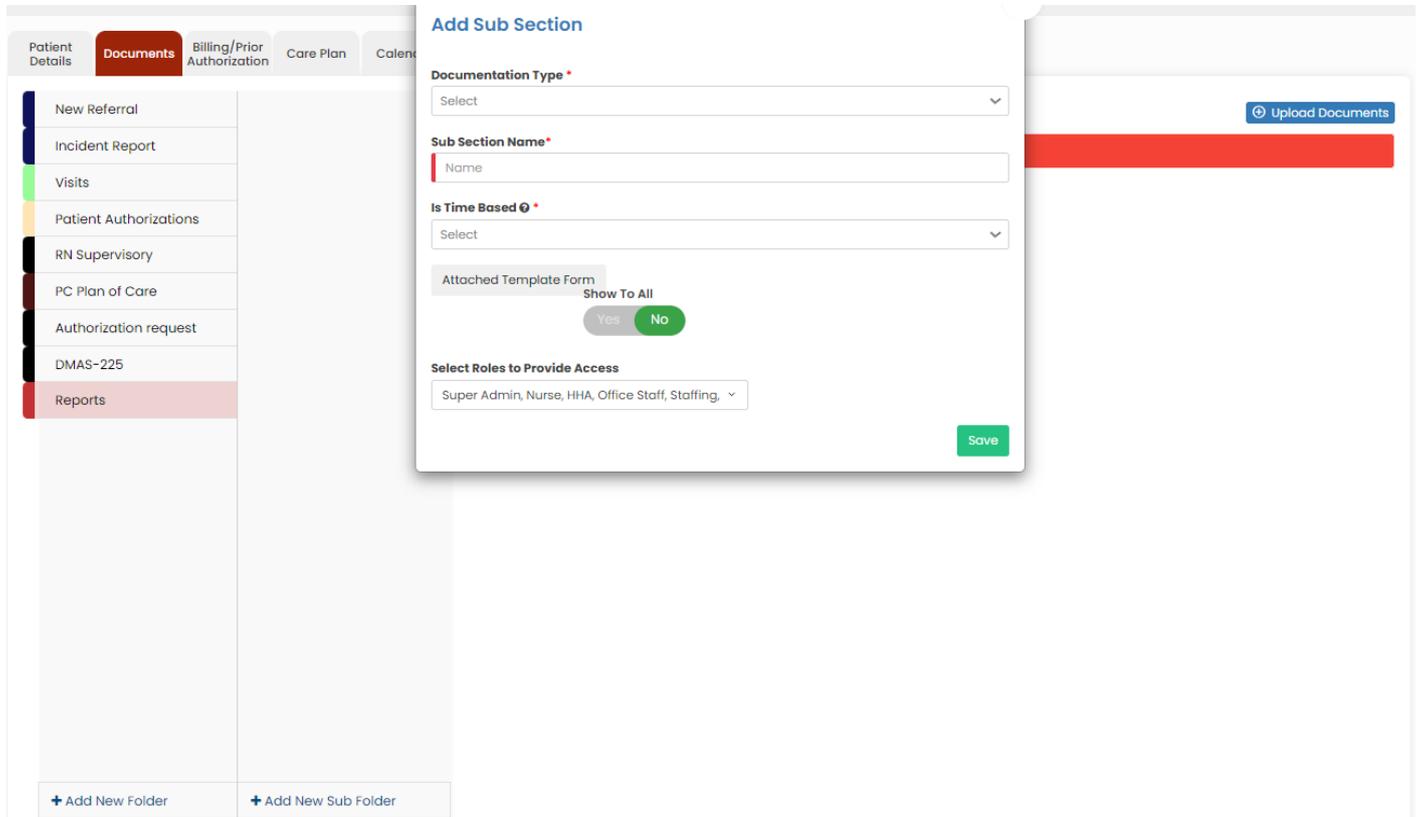


The folder Documents is added successfully to upload the required documents of the patient.



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

The screenshot shows the 'Documents' section for a patient. The sidebar on the left lists various document categories: New Referral, Incident Report, Visits, Patient Authorizations, RN Supervisory, PC Plan of Care, Authorization request, DMAS-225, and Reports. The main content area displays a folder for the year '2023'. A red banner across the folder indicates 'No records found.' and there is an 'Upload Documents' button in the top right corner. At the bottom, there are options to '+ Add New Folder' and '+ Add New Sub Folder'.

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 'ADD FORM' dialog box is overlaid on the document management interface. It provides two options for adding documents: 'Upload Scanned Document' and 'Fill New Form'. A note under 'Upload Scanned Document' states: 'You can upload images, pdf, documents and text files.' The background shows the document management interface with a red banner indicating 'No records found.' and an 'Upload Documents' button.

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 SMITH 70Y TIM 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	Action

- Archive
- Edit
- Clone
- Email beta
- Send for Signature beta

Archive option

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

EDIT PATIENT - PETER SMITH 70Y TIM MALE / #0002 / LOCATION: N/A / STATUS: ACTIVE - SERVICE ON-GOING

Patient Details Documents Billing

Vital SignTracking Letter of M
Facesheet Form Requests
Incident Report Auths
Visits
Patient Authorizat...
Client Documents
Clinical
Feedback
Medical Aid
Medication

Upload Documents

Archive

Are you sure you want to Archive this document?

Cancel Yes, Continue...

#	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

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

All Filters
Upload Documents

Document Name

Filter Date

Added Date From

Added Date To

Type

Search Type

Status

#	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
- Feedback
- Medical Aid
- Medication

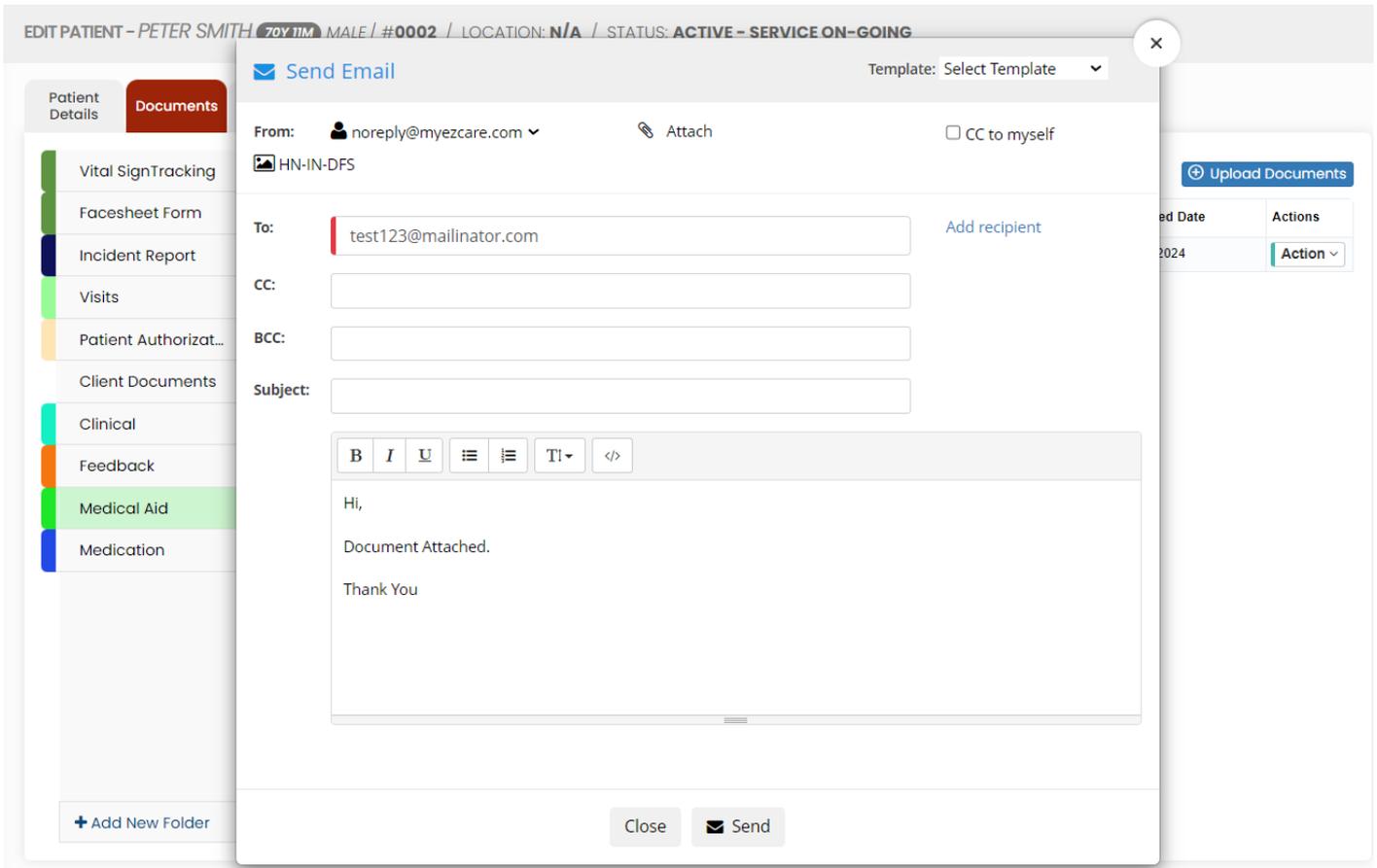
All Filters
Upload Documents

#	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 style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <ul style="list-style-type: none"> Archive <li style="border: 2px solid red;">Edit Clone Email <small>beta</small> Send for Signature <small>beta</small> </div>

Email Option

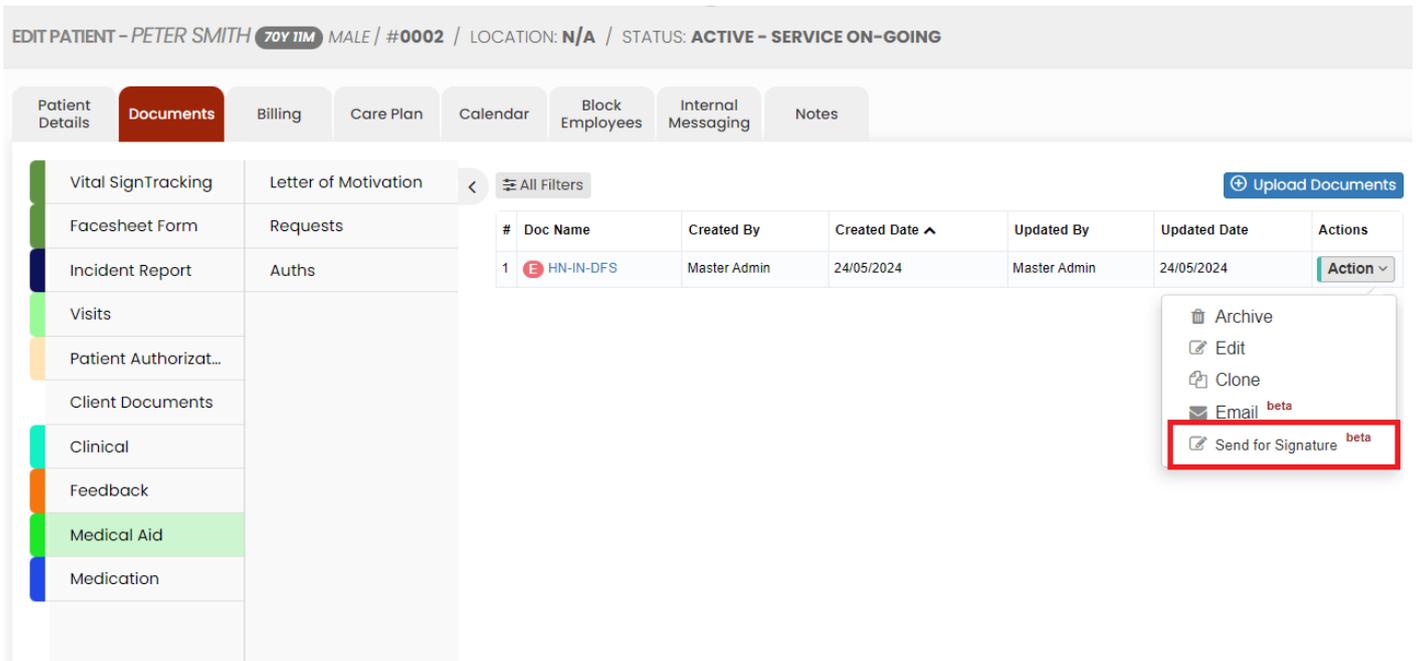
The uploaded scanned document can be sent through Email using the Email option. Click Email option under Actions of the scanned document. The following screen appears, update the Email address, Subject and content of the Email and click Send option. The Email will be sent along with the scanned document.

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.

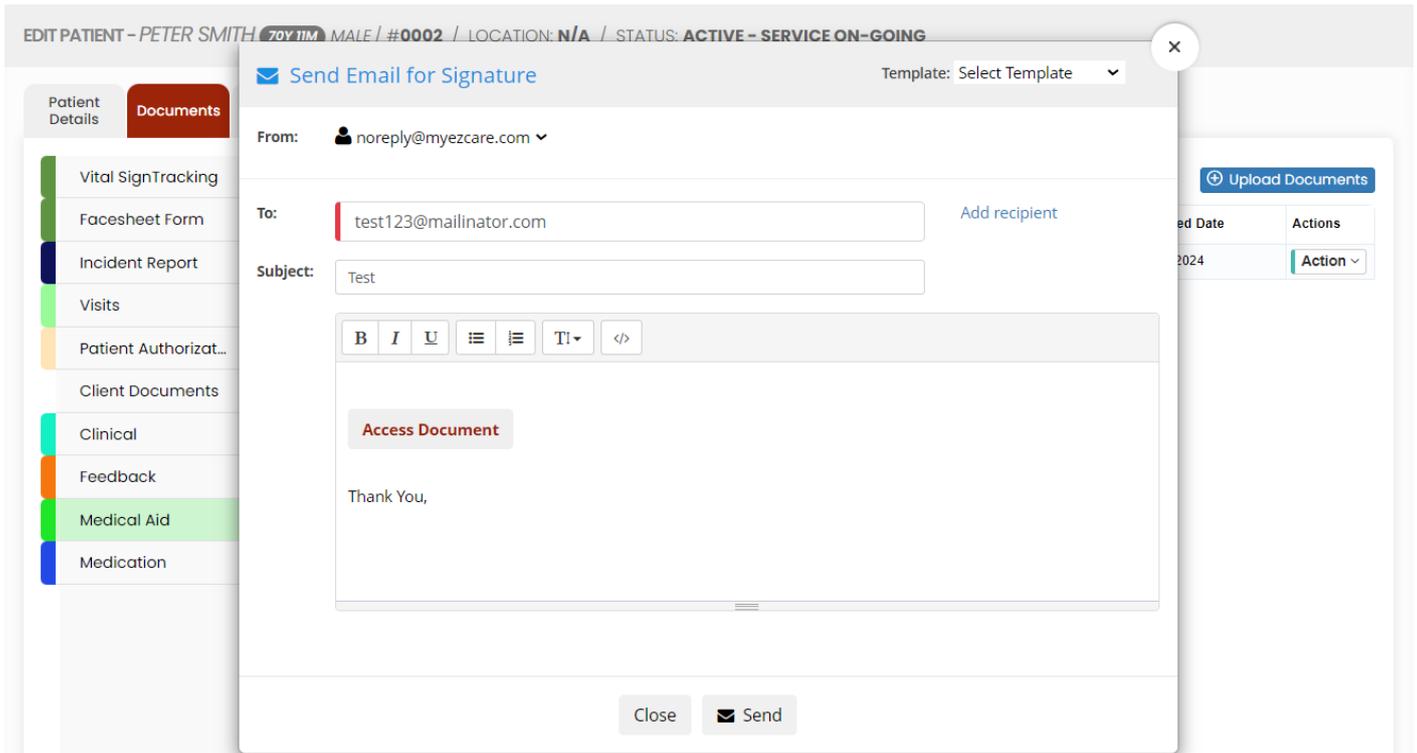


Send for Signature option

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.



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



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.

Document Access

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.

You can send the OTP by clicking the button below.

 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	Letter of Motivation
Facesheet Form	Requests
Incident Report	Auths
Visits	
Patient Authorizat...	
Client Documents	
Clinical	
Feedback	
Medical Aid	
Medication	

+ Add New Folder + Add New Sub Folder

Name	Sign
Morning Shift	<input type="text"/>  x Clear
Night Shift	<input type="text"/> x Clear
CC Sign	<input type="text"/> x Clear
CC Remarks	<input type="text"/>

EMO/OPE/NUR/01 - 2019

Save Cancel PDF

Revision #14

Created 11 October 2023 20:02:37 by Thamarai

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