

# Document Management

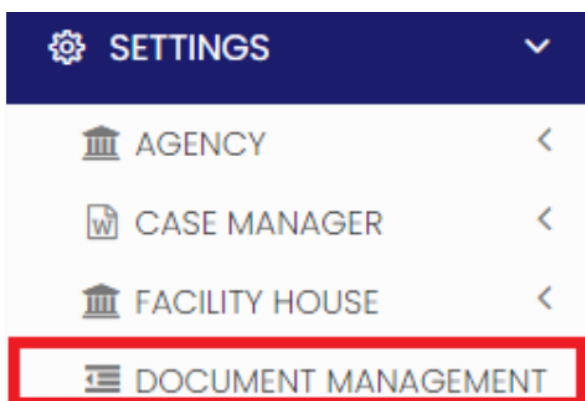
Document management in home health care involves efficiently organizing and storing patient records, treatment plans, and related documents to ensure high-quality care.

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

## Adding New Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Folder, select the User type Referral/ Employee and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#a81b1b

Is Time Based?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

|                          | User Type | Documentation Type | Parent | Type   | Name           | Is Time Based | Show To All | Action       |
|--------------------------|-----------|--------------------|--------|--------|----------------|---------------|-------------|--------------|
| <input type="checkbox"/> | Select    | Select             | Name   | Select | Name           | Select        | Select      | Search Reset |
| <input type="checkbox"/> | Referral  | Internal           |        | Folder | Care Plan      | No            | No          |              |
| <input type="checkbox"/> | Employee  | Internal           |        | Folder | Documents      | No            | No          |              |
| <input type="checkbox"/> | Referral  | Internal           |        | Folder | TIMESHEET 2023 | Yes           | Yes         |              |

# Editing Folder

Settings >> Document Management

Select the Folder from List and click Edit option on the right side of the screen.

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

|                                     | User Type | Documentation Type | Parent             | Type      | Name           | Is Time Based | Show To All | Action       |
|-------------------------------------|-----------|--------------------|--------------------|-----------|----------------|---------------|-------------|--------------|
| <input type="checkbox"/>            | Select    | Select             | Name               | Select    | Name           | Select        | Select      | Search Reset |
| <input checked="" type="checkbox"/> | Referral  | Internal           |                    | Folder    | Care Plan      | No            | No          |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | Documents      | No            | No          |              |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | TIMESHEET 2023 | Yes           | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | 2023           | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | testing        | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Incident Report    | Subfolder | RR1            | No            | Yes         |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | reports        | No            | Yes         |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | auth           | No            | Yes         |              |

Edit the required information and click Save option.

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Folder

Section Name\*

Care Plan

Role\*

Administrator, Clinical Team, ...

Color Scheme\*

#8c2b2b

Is Time Based?

No

Attached Template Form

Show To All

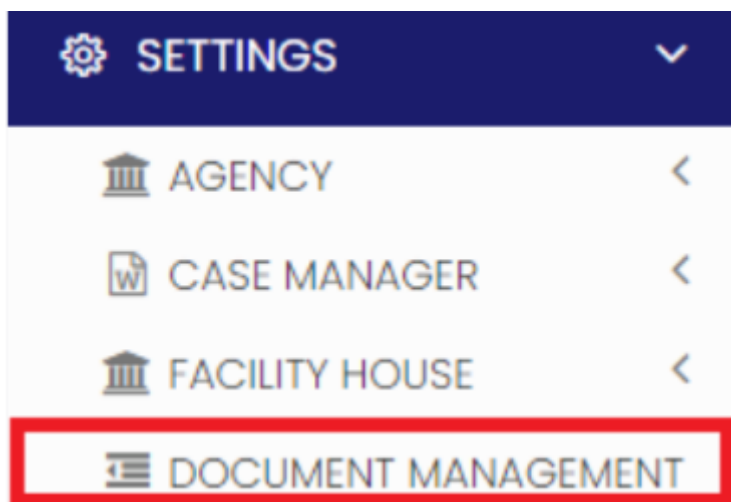
Yes

No

# Adding New Sub-Folder

To navigate through the process of adding Document Management, follow these steps:

**Settings >> Document Management**



For Adding new Sub-Folder, select the user type Referral/ Employee, select the Folder name in which the sub folder has to be added and update the required information in Edit Document management screen and click the option Show To All - Yes/No. When the user select the option Yes, then the Folder will be added to all the Client / Employee in the system. If the user select No option, then the Folder will be added only to the particular Client / Employee selected under the Assignee field.

A screenshot of the 'Edit Document Management' form. The form has a title bar 'DOCUMENT MANAGEMENT' and a subtitle 'Edit Document Management'. It contains several fields: 'User Type\*' (dropdown with 'Referral' selected), 'Assignee\*' (dropdown with 'Clark, Samuel' selected), 'Documentation Type\*' (dropdown with 'Internal' selected), 'Folder / Subfolder\*' (dropdown with 'Subfolder' selected), and 'Folder\*' (dropdown with 'Care Plan' selected). There are also 'Save' and 'Cancel' buttons at the top right. Below these are 'Subsection Name\*' (text input with '2023'), 'Role\*' (dropdown with 'Administrator, Clinical Team, ...'), 'Is Time Based?' (dropdown with 'No'), 'Attached Template Form' (text input), and 'Show To All' (radio buttons for 'Yes' and 'No', with 'No' selected).

# Editing Sub-Folder

**Settings >> Document Management**

Select the Sub-Folder from List and click Edit option on the right side of the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

|                                     | User Type | Documentation Type | Parent             | Type      | Name           | Is Time Based | Show To All | Action       |
|-------------------------------------|-----------|--------------------|--------------------|-----------|----------------|---------------|-------------|--------------|
| <input type="checkbox"/>            | Select    | Select             | Name               | Select    | Name           | Select        | Select      | Search Reset |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | Care Plan      | No            | No          |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | Documents      | No            | No          |              |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | TIMESHEET 2023 | Yes           | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | 2023           | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | testing        | No            | Yes         |              |
| <input checked="" type="checkbox"/> | Referral  | Internal           | Incident Report    | Subfolder | RR1            | No            | Yes         |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | reports        | No            | Yes         |              |

Edit the required information and click Save option.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ⓘ

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

|                                     | User Type | Documentation Type | Parent             | Type      | Name           | Is Time Based | Show To All | Action       |
|-------------------------------------|-----------|--------------------|--------------------|-----------|----------------|---------------|-------------|--------------|
| <input type="checkbox"/>            | Select    | Select             | Name               | Select    | Name           | Select        | Select      | Search Reset |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | Care Plan      | No            | No          |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | Documents      | No            | No          |              |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | TIMESHEET 2023 | Yes           | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | 2023           | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | testing        | No            | Yes         |              |
| <input checked="" type="checkbox"/> | Referral  | Internal           | Incident Report    | Subfolder | RR1            | No            | Yes         |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | reports        | No            | Yes         |              |

# Deleting Folder / Sub-Folder

## Settings >> Document Management

For deleting Folder / Sub-Folder in Document Management screen, select the Folder / Sub-folder from List by using the check box of the Folder / Sub-Folder and click Delete option or Disable Selected option on the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Referral

Assignee\*

Clark, Samuel

Documentation Type\*

Internal

Folder / Subfolder\*

Subfolder

Folder\*

Incident Report

Subsection Name \*

RR1

Role \*

Administrator, Clinical Team, ...

Is Time Based ?

No

Attached Template Form

Show To All

Yes

No

Refresh

Active

Disable Selected

|                                     | User Type | Documentation Type | Parent             | Type      | Name           | Is Time Based | Show To All | Action       |
|-------------------------------------|-----------|--------------------|--------------------|-----------|----------------|---------------|-------------|--------------|
| <input type="checkbox"/>            | Select    | Select             | Name               | Select    | Name           | Select        | Select      | Search Reset |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | Care Plan      | No            | No          |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | Documents      | No            | No          |              |
| <input type="checkbox"/>            | Referral  | Internal           |                    | Folder    | TIMESHEET 2023 | Yes           | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | 2023           | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Plan of Care (485) | Subfolder | testing        | No            | Yes         |              |
| <input type="checkbox"/>            | Referral  | Internal           | Incident Report    | Subfolder | RR1            | No            | Yes         |              |
| <input checked="" type="checkbox"/> | Employee  | Internal           |                    | Folder    | reports        | No            | Yes         |              |
| <input type="checkbox"/>            | Employee  | Internal           |                    | Folder    | auth           | No            | Yes         |              |

# Restore Deleted Folder / Sub-Folder

## Settings >> Document Management

The Deleted folder can be viewed by using the dropdown option Deleted after the Refresh option in the screen.

DOCUMENT MANAGEMENT

Save

Cancel

User Type\*

Select

Documentation Type\*

Internal

Folder / Subfolder\*

Select

Name \*

Name

Role \*

Select

Is Time Based ?

No

Attached Template Form

Refresh

Active

All Records

Active

Deleted

|                          | User Type | Documentation Type | Parent                | Type      | Name                  | Is Time Based | Action       |
|--------------------------|-----------|--------------------|-----------------------|-----------|-----------------------|---------------|--------------|
| <input type="checkbox"/> | Select    | Select             | Name                  | Select    | Name                  | Select        | Search Reset |
| <input type="checkbox"/> | Employee  | Internal           | Professional Document | Subfolder | Certificate           | No            |              |
| <input type="checkbox"/> | Employee  | Internal           |                       | Folder    | Professional Document | No            |              |
| <input type="checkbox"/> | Referral  | Internal           |                       | Folder    | Plan of Care (485)    | Yes           |              |
| <input type="checkbox"/> | Employee  | Internal           |                       | Folder    | RE Plan of Care       | No            |              |
| <input type="checkbox"/> | Employee  | Internal           |                       | Folder    | PC Plan of Care       | No            |              |

Now the Deleted folder can also be restored by using the option Active on the right side of the screen.

Edit Document Management

Save Cancel

User Type\*  
Select

Documentation Type\*  
Internal

Folder / Subfolder\*  
Select

Name\*  
Name

Role\*  
Select

Is Time Based ⓘ  
No

Attached Template Form

Refresh Deleted

|                          | User Type | Documentation Type | Parent | Type   | Name                | Is Time Based | Action                                     |
|--------------------------|-----------|--------------------|--------|--------|---------------------|---------------|--|
| <input type="checkbox"/> | Select    | Select             | Name   | Select | Name                | Select        | Search Reset                               |
| <input type="checkbox"/> | Referral  | External           |        | Folder | Patient Test Report | No            | <input checked="" type="checkbox"/> Active |

Showing 1 to 1 of 1 records

Revision #3  
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