

# 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.

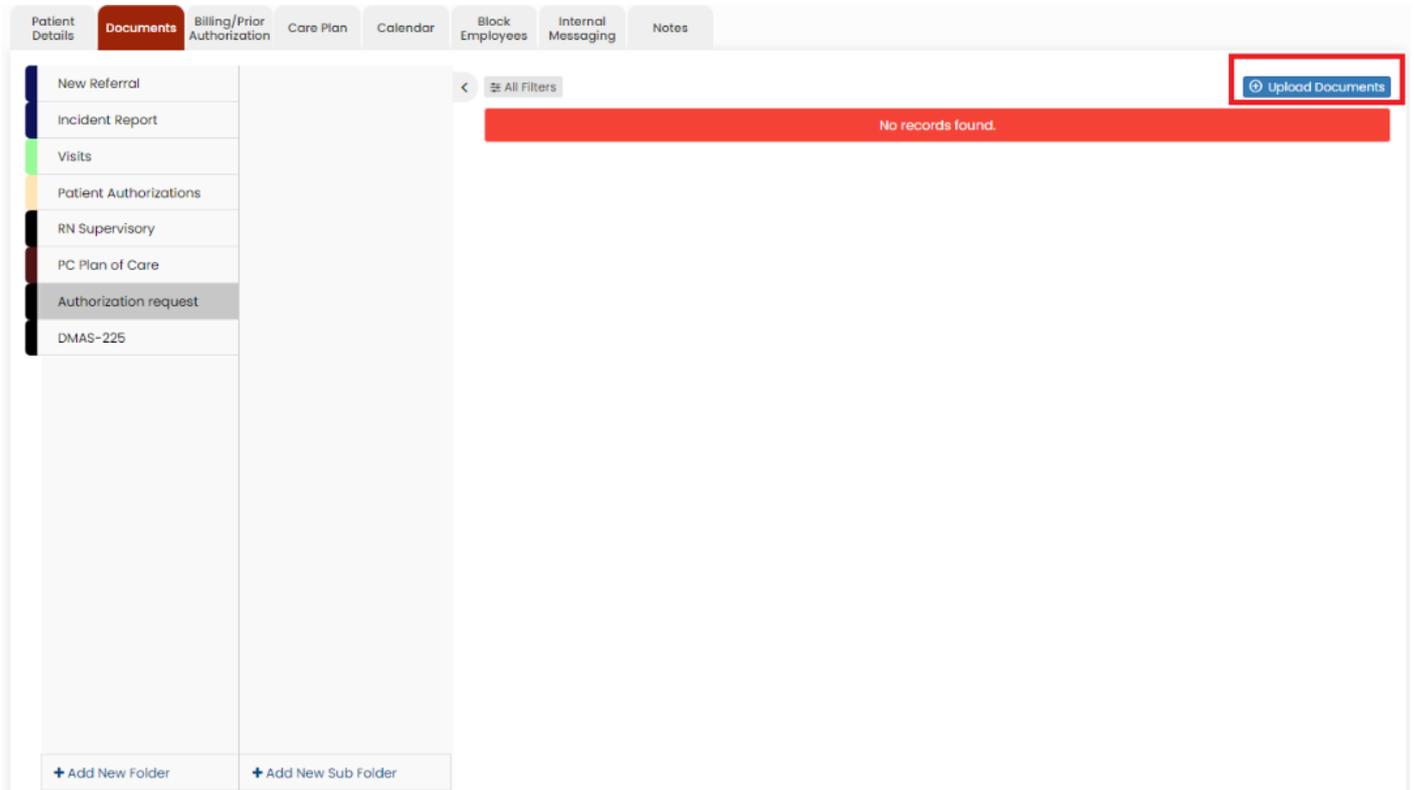
## Uploading Patient Documents

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

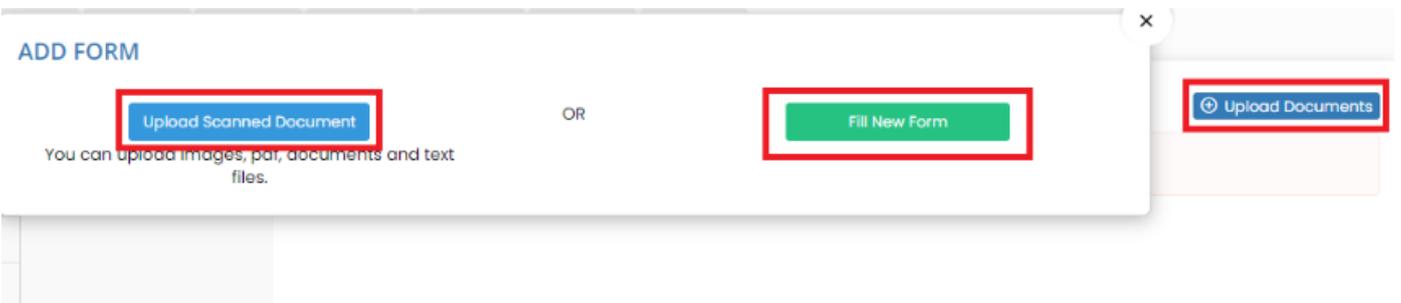
**Client >> List >> Select Patient >> Document**

The screenshot shows a web application interface for patient management. At the top, there is a header bar with the text "EDIT PATIENT - MICHAEL, DANIEL (61Y 11M) MALE / #76491585 / LOCATION: ROCKY MOUNT / STATUS: ACTIVE". Below the header, there is a navigation menu 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 divided into two columns. The left column contains a list of document types: "New Referral", "Incident Report", "Visits", "Patient Authorizations", "RN Supervisory", "PC Plan of Care", "Authorization request", and "DMAS-225". The right column is mostly empty, with a "Upload Documents" button in the top right corner. At the bottom of the left column, there are two buttons: "+ Add New Folder" and "+ Add New Sub Folder".

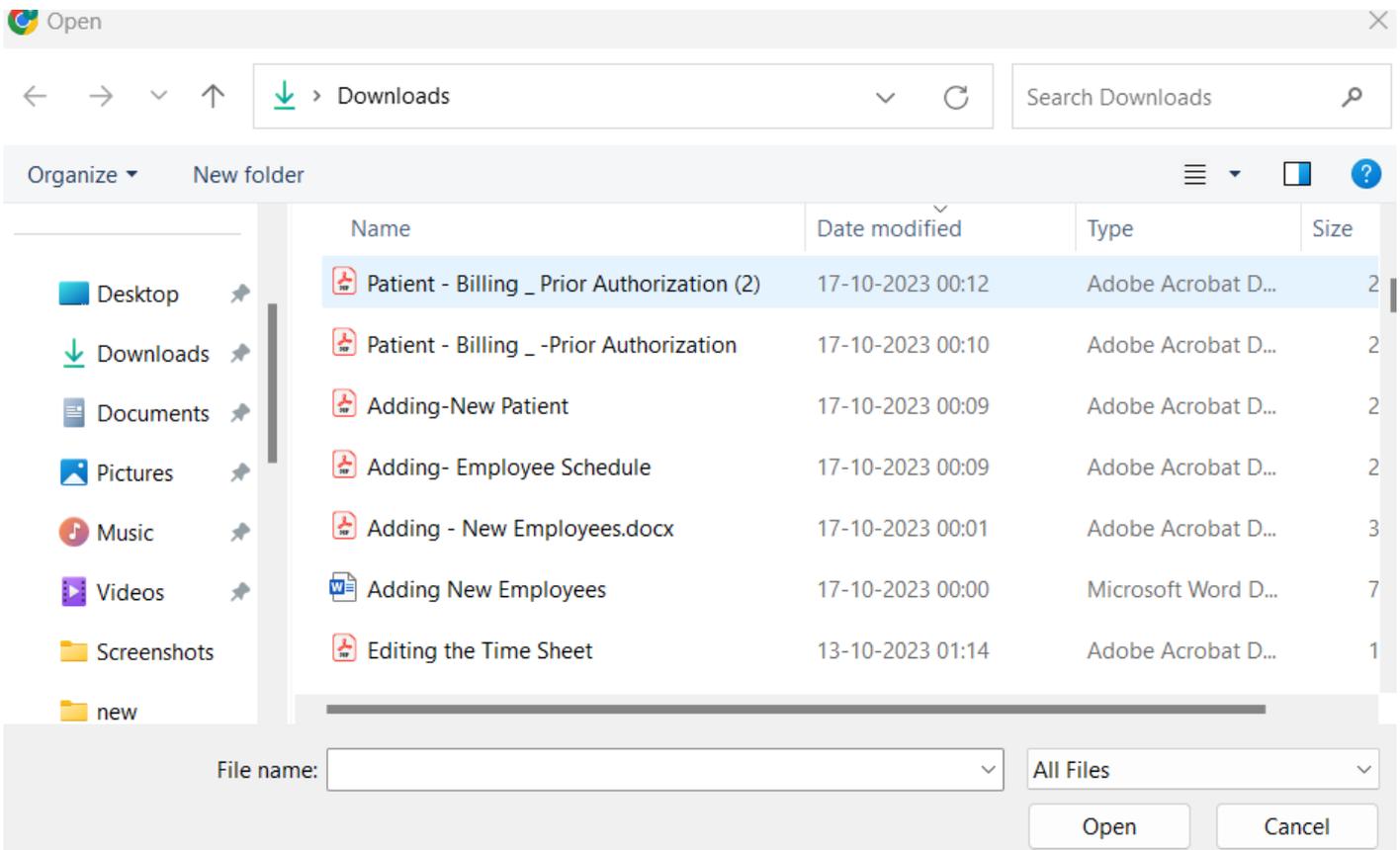
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



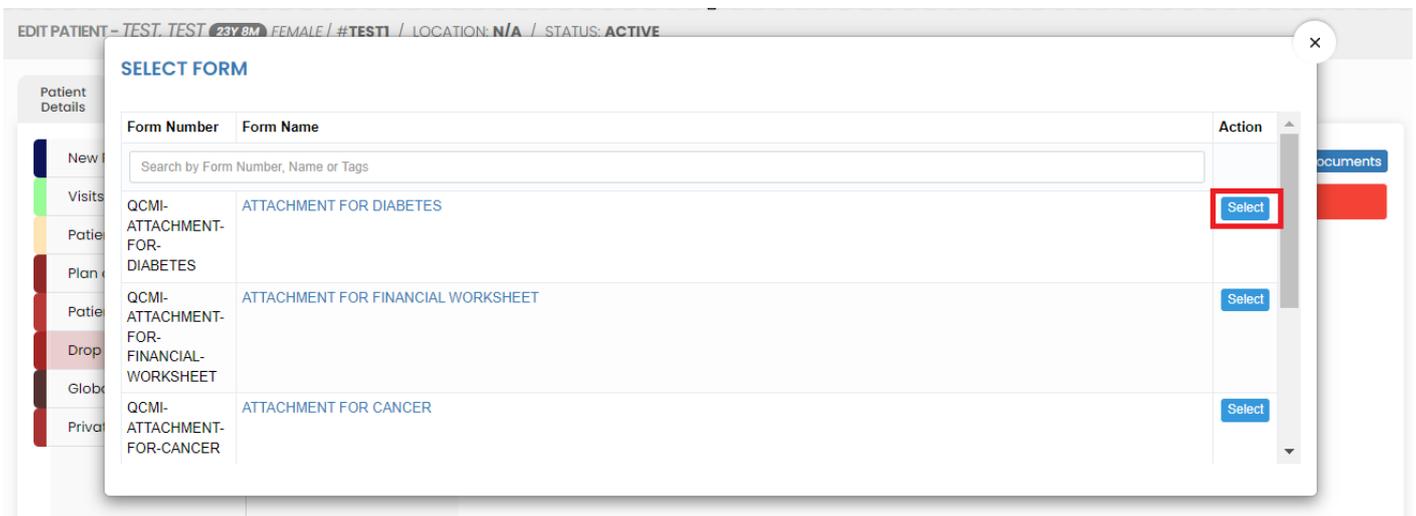
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



Upload Scanned Document option allows the user to upload the scanned documents as per requirement.



Fill New Form option allows the user to select the form from the list.



After selecting the form, the following pop-up appears whether to Map Form. Click Yes option if the user wants to preserve this preference for future use, if not Click No. The user can now edit the form and click save option at the bottom of the document.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

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

New Referral 2023

Visits

Patient Authorizations

Plan of Care (485)

Patient Test Report

Drop Box

Global

Test

+ Add New Folder + Add New Sub Folder

### Advanced Directive Acknowledgment

Please check all that are applicable

The federal and state laws regarding Advance Directives have been explained to me and I have received materials about these laws from myEZcare

I have formulated Advance Directives on  Date

Please Enter 60 Characters Only

I have not formulated Advance Directives.

I have executed a Power of Attorney with medical decision-making authority to:

Please Enter 30 Characters Only.

I have been advised to give a copy of my Advance Directives to my physician.

I understand that the Home Health Care Agency does not require that I develop Advance Directives in order to receive care.

I understand that I can make changes to my Advance Directives at any time.

Date  Date

Patient Signature  Nurse Signature

The following screen appears, click Save option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan

New Referral 2023

Visits

Patient Authorizations

Plan of Care (485)

Patient Test Report

Drop Box

Global

Test

### Edit Document

File Name\*

Document Kind\*

Created Date	Updated By	Updated Date	Actions
24/11/2023	Master, Admin	24/11/2023	<input type="button" value="Action"/>

Under Action, we have the following options like Archive, Edit, Clone and Email.

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

New Referral 2023 All Filters Upload Documents

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action

Archive Edit Clone Email <sup>beta</sup>

**The features under Actions are :**

- Archive
- Edit
- Clone
- Email

**Archive**

To Delete the uploaded document, click Archive option under Actions.

EDIT PATIENT - TEST, TEST **23Y 8M** FEMALE / #TESTI / LOCATION: N/A / STATUS: ACTIVE

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

New Referral 2023 All Filters Upload Documents

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action

Archive Edit Clone Email <sup>beta</sup>

The following pop-up appears, click Yes to continue. The document will be deleted from the folder.

EDIT PATIENT - TEST, TEST **23Y 8M** FEMALE / #TESTI / LOCATION: N/A / STATUS: ACTIVE

Patient Details **Documents** Billing Care Plan

**Archive**

Are you sure you want to Archive this document?

Cancel Yes, Continue...

New Referral 2023 All Filters Upload Documents

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action

## Restore deleted document

To Restore the deleted click All filters option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

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

New Referral 2023 < All Filters Upload Documents

Visits

Patient Authorizations

Plan of Care (485)

Patient Test Report

Drop Box

No records found.

Select the Status Archive and click Search option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

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

New Referral 2023 < All Filters Upload Documents

Document Name Filter Date Added Date From Added Date To

Document Name Added Date dd/MM/yyyy dd/MM/yyyy

Type Search Type Status

Select Directory Active Active Archive Search Reset

No records found.

The deleted document is found in Archive Status. The user can click Active option under Action to Restore the deleted document.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

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

New Referral 2023 < All Filters Upload Documents

Document Name Filter Date Added Date From Added Date To

Document Name Added Date dd/MM/yyyy dd/MM/yyyy

Type Search Type Status

Select Directory Archive Search Reset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action
2	1.PNG	Master, Admin	08/11/2023	Master, Admin		Active Edit Clone Email beta

The document is now restored under Active Status in the system.

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

- New Referral 2023
- Visits
- Patient Authorizations
- Plan of Care (485)
- Patient Test Report
- Drop Box
- Global
- Test

≡ 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	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action

### Edit

The Edit option is used to edit the information in the document. Click Edit option under Actions to make the changes in the document and click Save.

Advanced Directive Acknowledgment
✓

### Advanced Directive Acknowledgment

**Please check all that are applicable**

The federal and state laws regarding Advance Directives have been explained to me and I have received materials about these laws from myEZcare

I have formulated Advance Directives on  Date 

Please Enter 60 Characters Only

I have not formulated Advance Directives.

I have executed a Power of Attorney with medical decision-making authority to: 

Please Enter 30 Characters Only.

- I have been advised to give a copy of my Advance Directives to my physician.
- I understand that the Home Health Care Agency does not require that I develop Advance Directives in order to receive care.
- I understand that I can make changes to my Advance Directives at any time.

Date	Date
<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>

Patient Signature	Nurse Signature
<input type="text"/>	<input type="text"/>
<input type="button" value="x Clear"/>	<input type="button" value="x Clear"/>

As <input type="text"/>	does not have decision making capacity, I	<input type="text"/>	as the
<small>Please Enter 30 Characters Only.</small>		<small>Please Enter 25 Characters Only.</small>	
(Patient Name)	(Name and Relationship to Patient)	representative, attest to the above information.	
<input type="text"/>	<input type="text"/>		

(Representative for Patient Signature)	Date
<input type="text"/>	<input type="text" value="11/2/2023"/>
<input type="button" value="x Clear"/>	<input type="button" value="Calendar"/>

### Clone Option

The Clone option is in progress within the application.

**Email - Beta ( This is an optional beta feature, which may not be stable at this time. Use it at your own risk and we appreciate your valuable feedback to improve the user experience.)**

The Email option is used to send documents from the patients to the Caregiver/Staff. The user has to enter the required fields and Click Send option.

Most of the options are under Beta in Send Email screen.

Send Email

Template: Select Template

From: noreply@myezcare.com

Attach

CC to myself

To: test123@gmail.com

Add recipient

CC:

BCC:

Subject: Test Demo

**B** *I* U   **T**  

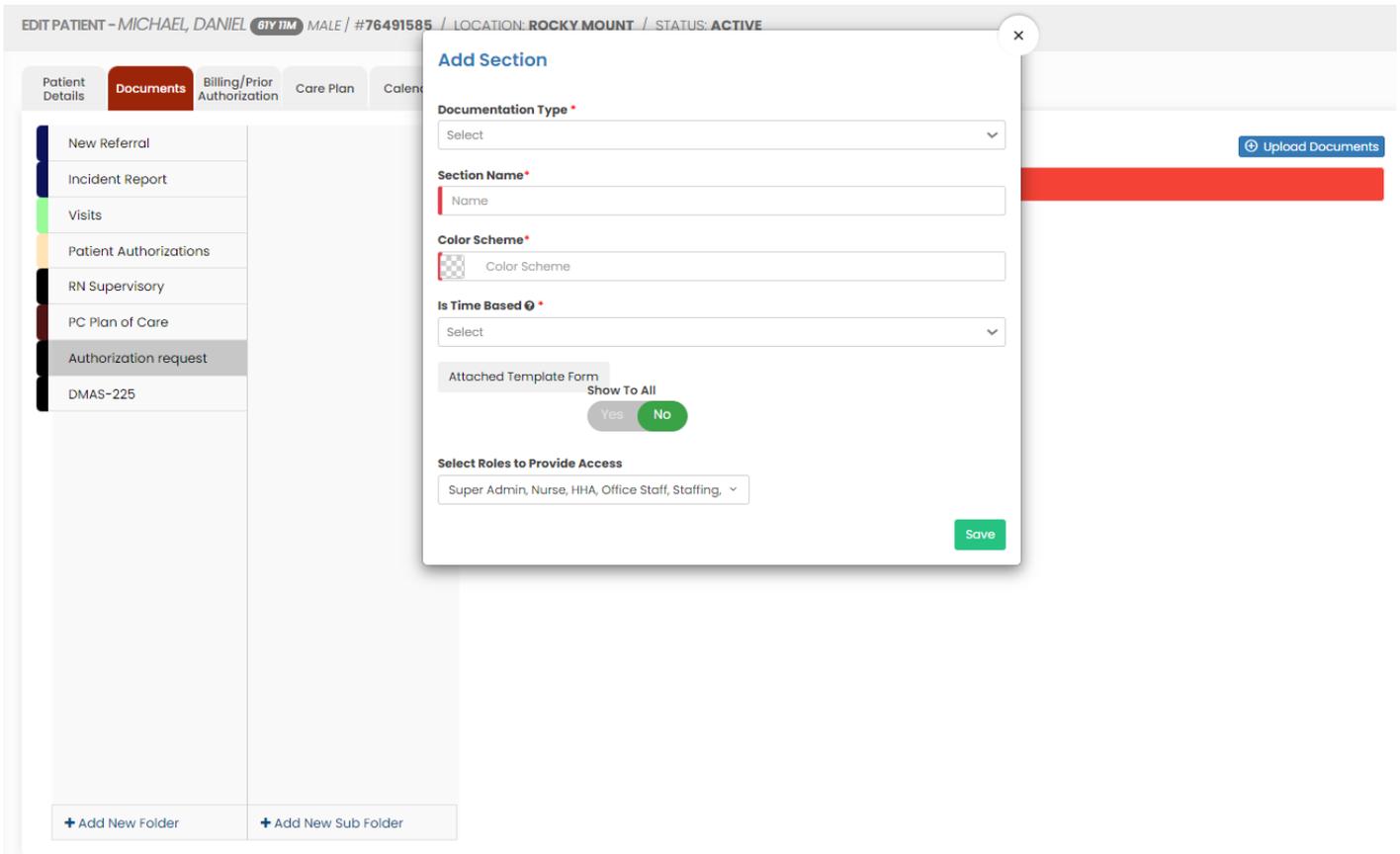
Testing 123

Close

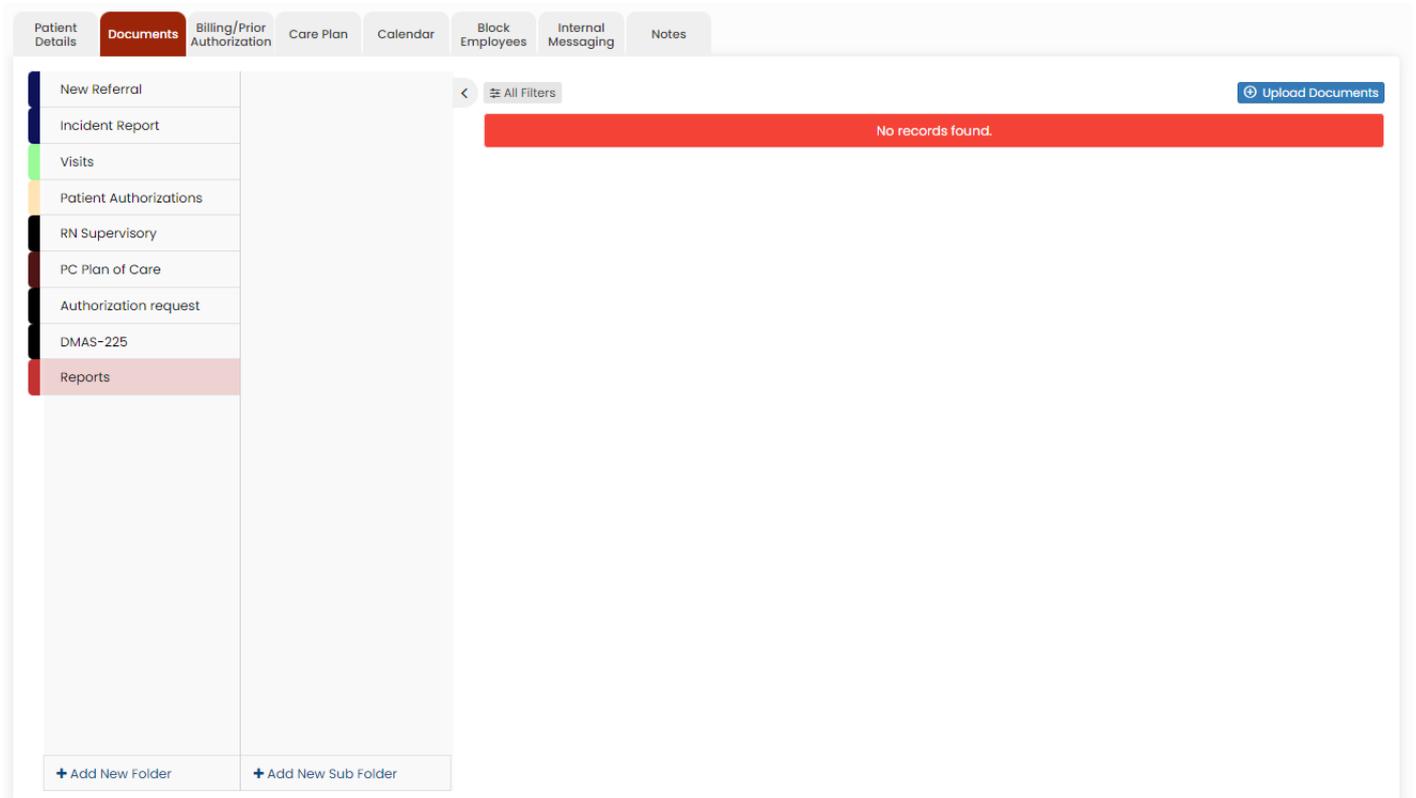
 Send

## 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.

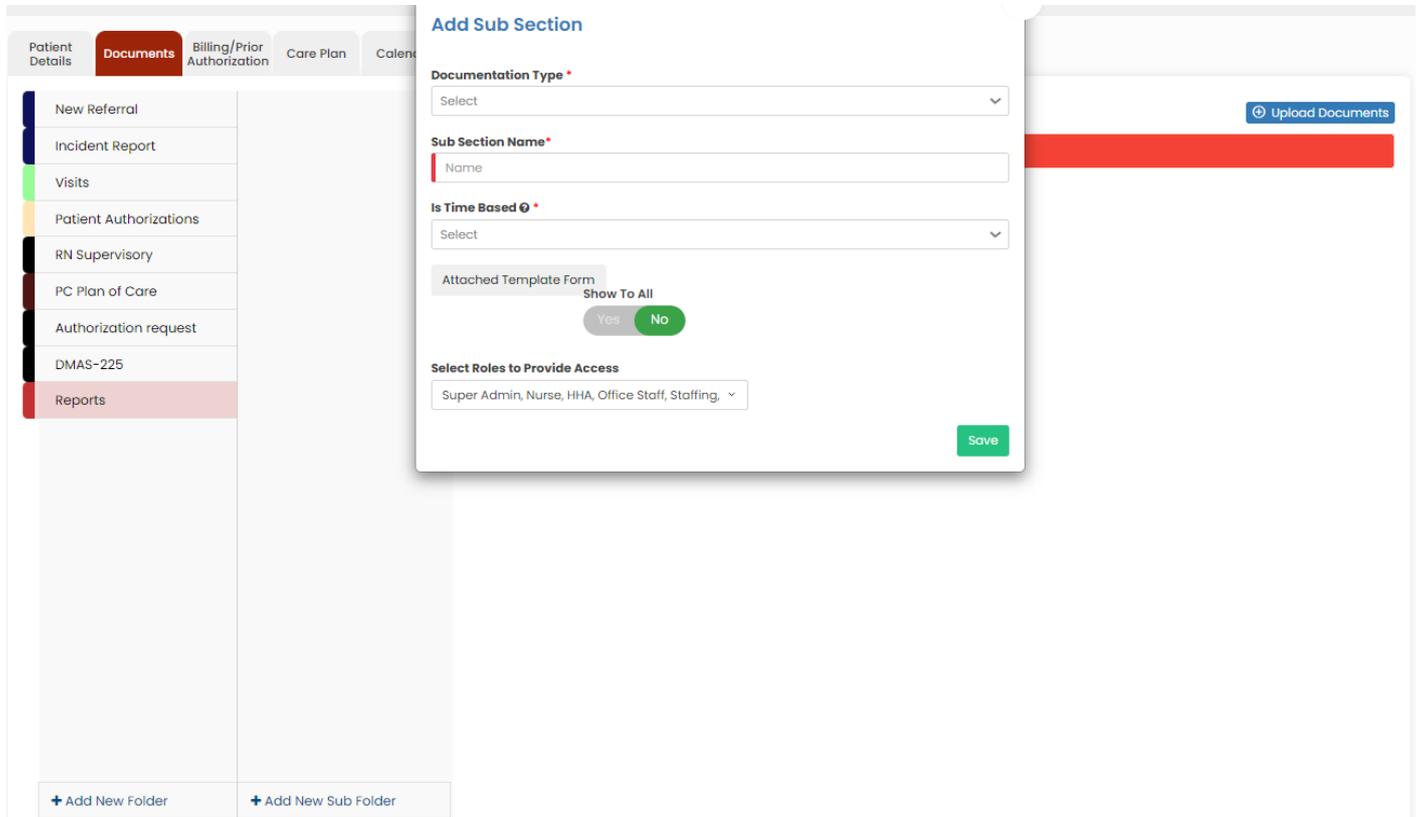


The folder Documents is added successfully to upload the required documents of the patient.



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.

Navigation tabs: Patient Details, **Documents**, Billing/Prior Authorization, Care Plan, Calendar, Block Employees, Internal Messaging, Notes

Left sidebar menu:

- New Referral
- Incident Report
- Visits
- Patient Authorizations
- RN Supervisory
- PC Plan of Care
- Authorization request
- DMAS-225
- Reports

Main content area:

2023 < All Filters [Upload Documents](#)

No records found.

Footer: + Add New Folder + Add New Sub Folder

Revision #5

Created 22 November 2023 19:33:29 by Thamarai

Updated 24 November 2023 22:46:07 by Thamarai