Viewing Documents

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1. Search for a patient.
2. Click **Show**.
3. In the Main Menu, click **Documents**.
4. The Documents screen will display with the following sub-menu tabs:
    a. Reported
    b. Requested
    c. Follow-up
    d. Complete
    e. Deleted
5. The summary screen will also display any previously uploaded documents.
6. Information fields for each document are:
    a. Provider: This is the related Provider, if any, that the document relates to (for small clients this may be the main specialist).
    b. Location
    c. Type
    d. Date of Document: The date associated with the document (can be edited).
    e. Notes: Add any additional information (e.g., sender of the document, subject, etc.).
    f. Updated At
7. Click **Show** to view additional document details. See table below for more information.
8. Other document options include:
    a. Edit
    b. Complete
    c. Follow-up
    d. Delete

Field	**Description**
Patient	This will default to the select patient details
Provider	This is the related Provider, if any, that the document relates to (for small clients this may be the main specialist)
Location*	
Document Type*	This is the subject/ category of the docucment i.e. Referral letter, General letter (Document Types are set by your System Administrator)

Field	Description
Document Status*	This can be Reported, Requested, Follow up, Complete or Deleted
Date of Document	This is a editable field which the date from within the document can be set
Notes	Use this field to add any useful information i.e Who the Document is from? i.e. GP ?or Subject of the document
Uploaded Document	

Viewing Document Locations

1. From the Dashboard, click on **Locations**.
2. Click on the name of a location.
3. In the Main Menu, click **Documents**.
    a. The Documents screen will display with the following sub-menu tabs:
        i. Unmatched Results
        ii. Documents (matched results)
4. The Documents screen will default to the unmatched results.