Categorisation of Documents

When you save a document against a patient record you are able to categorise it. These categories can be setup by your System Administrator in Administration → Documents. Categories can be associated with a colour for easy association at glance.

If you are using Bulk Document Importation, documents can be categorised automatically by CareRight based on the folder they are saved into. So, you could set up multiple folders and configure you scanner to drop the document into the relevant folder. When CareRight imports from this folder it applies the relevant category to that document.

For example, you may have a folder for scanned Referral Letters and another folder for Patient Registration Forms. CareRight can automatically categorise the documents based on the folder that they land in.