

Matching Documents

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The follow process to access Unmatched documents from Location/Provider

From a Location / Provider record:

1. Select **Documents** from menu.
 2. Select **Match** next to document to be matched.
 - a. The document records will display (this screen defaults to unmatched records).
 3. Fill in the following details:
 - a. Patient (or create new patient).
 - b. Provider.
 - c. Document Type - These are predefined values set up by your System Administrator.
 - d. Document Status.
 - e. Date of Document – this is the date taken from the letter/document (not mandatory).
 - f. Notes – Fill in who the letter is from / any other important info (this will display in the summary screen).
 4. Select **Update Document** button.
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