

# Document Management

Last Modified on 02/06/2023 12:39 pm ACST

## Document Management

CareRight allows for scanned/electronic documents to be saved against a patient record. Documents can be loaded into CareRight via two methods. Which way you choose will depend on the volume of documents you plan to upload to CareRight. The two ways to load documents into CareRight are:

Method	Overview of the process	Suitable for
Manual Upload	Documents are uploaded via the Patient Record > Documents tab	Low Volume / Occasional Use
Bulk Document Importation	Documents are imported into CareRight automatically (every 2 minutes)	Medium-High Volume / Frequent Use

Each of these methods is discussed in the following sections.

1. Manual Upload of Documents - see Manual Upload of Documents
2. Bulk Document Importation

## Share a document securely with a patient

CareRight has ability to dispatch the pathology and radiology requests automatically to patients via email. Previously, there was only print option available in the screen.

- The patient has email clinical consent set.
- Secure SMTP configured.
- User can send a link with a secure token which includes patient detail and document detail, that expires as per Branding Settings > Expiry.

Patient -> document -> View a specific (pathology/radiology) result

REPORTED REQUESTED FOLLOW UP COMPLETE DELETED					
New Reported Document					
Dashboard / Patients / Miss Beverly MORGAN					
Documents					
Provider	Location	Type	Date of Document	Notes	Updated At
	Adelaide	General Document	01/06/2023	Test	01/06/2023 at 02:16 PM (+0930)
					Show
					Send By Email