Bulk Documentation Importation

Last Modified on 21/05/2019 11:57 pm ACST

Bulk Document Importation

This section describes the process to bulk upload documents into CareRight.

Workflow

To summarise the workflow, here is how documents are uploaded to CareRight via this method:

1. You save/scan documents to a folder on your local computer or server.
2. The Clintel Uploader runs on the same machine that the documents are scanned to (in most cases this is the server).
3. The Clintel Uploader checks the designated folders every two minutes and imports documents.
4. The original document is moved to an Archive folder and a copy of it now appears in CareRight.
5. Documents can be categorised automatically based on the folder that they are saved to.
6. You presented with a list of documents that have been imported.
7. You can view each document and Match these to a patient.
8. Documents needs to be categorised.
9. Documents can be assigned to a staff member for review.
10. The staff member can mark the document as complete once the review has taken place.

Process

Imported documents can be viewed at three levels:

Level	Description	Navigation (Dashboard > ...)
Location	View imported documents for a specific	Locations > View Location >

	location	Documents
Level	**Description**	**Navigation (Dashboard > ...)**
Provider	View imported documents for a specific provider	Providers > Show > Documents
Patient	View imported documents for a specific patient	Patients > Show > Documents

To match an imported document to a patient record in CareRight:

1. Scan your document or save it to a the directory that CareRight checks (see your system administrator for details on this).
2. CareRight will automatically import the document - this process occurs every 2 minutes.
3. Go to the relevant page in CareRight - see the Navigation section in the table above.
4. Click **Documents**.
    a. Unmatched documents will show on the screen.
5. Click **Match**.
6. Select a *patient to match to document to.
7. Select the *provider that the document relates to (for small clients this may be the main specialist).
8. Select the *location.
9. Select the *document type.
10. Update the Document status.
11. Update the Date of the document.
12. Add some Notes if applicable.
13. Select the **Update Document** button.
    a. The document will now be linked to the Patient Record

* indicates a mandatory field