

# Manual Upload of Documents

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

## Workflow

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


1. Save/scan documents for a patient to a folder on your local computer or server.
2. Browse to the patient in CareRight.
3. Via the Documents menu you can upload and categorise one or more documents.
4. Documents can be assigned to a staff member for review.
5. The staff member can mark the document as complete once the review has taken place.

The diagram illustrates the workflow for manual document upload in CareRight through three sequential screenshots:

**Step 1: Patient Profile - Documents Menu**  
The first screenshot shows the patient profile for Mrs Catherine Smithson. The left-hand navigation menu has the 'Documents' option highlighted with a mouse cursor. The patient's details on the right include MRN: 000220, CRN: 001036, and status tags for 'Blood Thinner' and 'Consent Required'. Breadcrumbs at the bottom indicate the path: Dashboard / Patients / Mrs Catherine Smithson.

**Step 2: Document Management - New Reported Document**  
The second screenshot shows the 'New Reported Document' button, which is highlighted with a mouse cursor. Above this button are tabs for 'CURRENT' and 'DELETED'. The breadcrumb path remains: Dashboard / Patients / Mrs Catherine Smithson.

**Step 3: Document Entry Form**  
The third screenshot shows the 'Document' entry form. It features a red header with the patient's name, Mrs Catherine Smithson, and buttons for 'ALERT' and 'ALLERGY'. The form contains fields for 'Patient' (Mrs Catherine Smithson - 01/01/1978 -) and 'Provider' (Clinic Clintel Hospital).

<b>Location</b>	MS Consulting	
<b>Document Type</b>	General Letters	
<b>Document Status</b>	Reported	
<b>Date of Document</b>	12/09/2018	
<b>Notes</b>	Transferred records from South General Hospital.	
<b>Attachment</b>	Choose File	South_Genera...ithson.docx

### 18.1.2 Process

To manually upload a document into a patient record in CareRight:

1. Scan your document or save it to a local directory on your machine or network
2. Open CareRight and search for the patient that the document relates to
3. Click into the Patient's record, select the Show button
4. From the left-hand menu, select Documents
5. The Documents screen will display.
6. Select the New button and the Document screen will display.
7. Fill in the following Fields:

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)
Field	Description
Location*	
Document Type*	This is the subject/ category of the document i.e. Referral letter, General letter (Document Types are set by your System Administrator)
Document Status*	This can be Reported, Requested, Follow up, Complete or Deleted
Note	Use this field to add any useful information i.e Who the Document is from? i.e. GP ?or Subject of the document

\* indicates a mandatory field

8. Select the Choose file button, and browse to the document on your network.

9. Select the Create Document button

The Document will be uploaded to the Patient record and will be displayed under each Document Type/ Category.

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