## Manual Upload of Documents

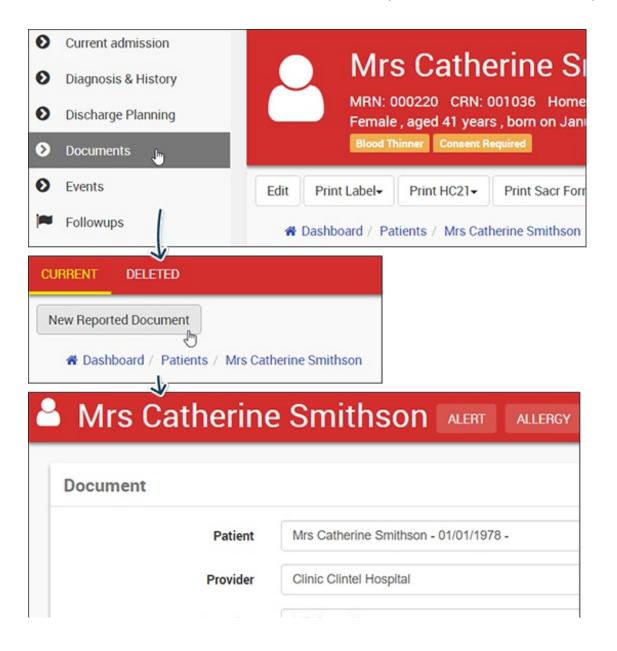
Last Modified on 22/05/2019 12:10 am ACST

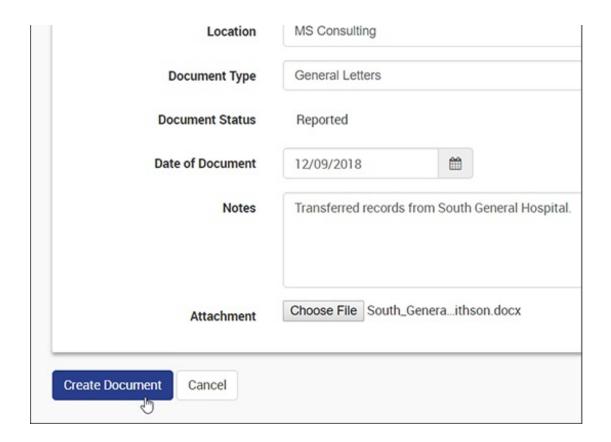
This section describes the process to manually upload documents into CareRight.

## 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.





## **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	This is the subject/ category of the docucment i.e. Referral letter, General letter
Type*	(Document Types are set by your System Administrator)
Document	This was be Bounded Bounded Fellower Consulate as Belief
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
11010	Subject of the document

<sup>\*</sup> 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.