Documents Provider

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The Provider Documents screen will display all the related documents to the selected provider, such as Referral Letters. You are also able to access any Unmatched Documents (the screen will default to this view).

Viewing Documents

From CareRight Dashboard:

1. In the Main Menu, click **Providers**.

    a. The Providers list will display.

2. Locate the relevant provider.

3. Click Show for the relevant provider.

4. In the Main Menu, click **Documents** then re-select **Documents** again.

    a. The Providers Documents will display both Current & Deleted.

Adding a New Document

1. Scan your document or save it to a local directory on your machine or network.

2. From the relevant Provider record, select **Documents** menu item.

    a. The Documents screen will display.

3. Select **Documents** again.

4. Select the **New** button and the Document screen will display.

5. Complete fields using the table below for reference.

6. Click **Choose File** and browse to the document on your network.

7. Click **Create Document**.

Field	Description
	Select the patient details, input the patient name and if they exist the record will

Patient	display.
Provider	This is will default to the selected Provider
Location*	
Document Type*	
Document Status*	
Note	

* indicates a mandatory field