

Using Documents

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Documents

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:

- Manual Upload - Documents are uploaded directly to the Patient Record (Low Volume / Occasional Use)
- Bulk Document Importation - Documents are imported into CareRight automatically (every 2 minutes) (Medium-High Volume / Frequent Use)

System Administration

Document Types can be configured by your System Administrator (e.g., Referrals, Consent Forms, etc.). If you are using the Bulk upload function, a corresponding folder can be set up to match these document types.

Manual Upload

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**.
 - a. The Documents screen will display.
5. Select the **New** button and the Document screen will display.
6. Fill in the relevant fields.
7. Select the **Choose file** button, and browse to the document on your network.

8. **Select Create Document.**

- a. The document will be uploaded to the patient record.

Bulk Documentation

This requires the CareRight uploader to be installed and your scanning solution to be set up to a network drive. The process for bulk documentation upload is:

1. Save/scan documents to a folder on a 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 (i.e., CareRight Scans).
 - a. The original document is moved to an Archive folder and a copy of it now appears in CareRight.
4. Documents can be categorised automatically based on the folder that they are saved to (e.g., CareRight Scans/Referrals or CareRight Scans/Consent Forms).

Important Note:

Bulk PDF Scanned documents will not match automatically to a Patient Record – they will need to be manually matched and categorised (see Unmatched Documents process).
