

Bulk Document Importation

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

CareRight is able to import documents automatically from specific folders on your server/workstation. This requires the Clintel Uploader to be installed on the server or desktop machine that you scan your files to.

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.

To set up bulk document importation, you'll need to:

A: Setup - Outside of CareRight:

1. Decide on classifications for your documents (these will become document types in CareRight) e.g. Referral Letters, New Patient Forms, Consent forms, etc.
2. Setup Folders on your server.

3. This could be a different folder per document type.
 - a. Or it could be a different folder per doctor
 - b. Or it could be a different folder per doctor, and then document type within the doctor's folder
4. Configure your scanner to scan directly to the folders created in step two

B: Setup - Within CareRight/Clintel Uploader:

1. Setup Document Types in CareRight.
 2. For each Document Type configure Import Directories.
 3. Install the Clintel Uploader.
 4. Configure the Clintel Uploader.
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