

Documents

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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.

This screen allows you to set the display options for how documents are organised within the Patient > Documents screen and see the existing Document Types set up.

Note: Each page is limited to 100 records.

Display Options

The Display Options for Documents are as follows:

Display Option	Pick List Options	Effect/Description	Recommended Setting
Document Group By	By Status	Documents are listed under four tabs, once for each of the four statuses . So all <i>Reported</i> documents are listed under one tab, all <i>Complete</i> documents under another tab, etc.	<i>By Status and Type</i>
	By Type	Documents are listed under collapsible "folders" - only document types that have been selected are listed. This allows you to group like documents together e.g. all Referral Letters appear together.	
	By Status and Type	Documents are grouped by document type e.g. Referral Letter and separated under tabs into the four statuses above. So, all <i>ReferralLetters</i> with a status of <i>Reported</i> appear grouped together under the Reported tab.	
Document Show Location	TRUE / FALSE	Choose whether the Location appears on the Patient > Documents screen.	<i>If you only have <u>one location</u> set this to FALSE.</i>
Document Show Provider	TRUE / FALSE	Choose whether the Provider appears on the Patient > Documents screen.	<i>If you only have <u>one provider</u> set this to FALSE.</i>

A document can have one of four statuses:

- Reported
- Follow Up
- Complete
- Deleted

Document Types

This screen also displays the Document Types which have been set up. You can configure *Document Types* to categorise scanned/imported documents. e.g. Referral Letter, New Patient Form, etc.

The following elements are displayed:

- Name
- Description
- Enable (Y/N)
- Colour
- Update at (date)

To review the Document Types:

1. Select **Show** button.
 - a. This will display the Document Types information and the Import Directories.
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