Automated importing of scanned correspondence

Last Modified on 09/12/2019 9:26 am ACDT

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.

   This can be used if you are using the **Clintel Uploader** to perform Bulk Document Importation via Secure Messaging (such as Argus). To add a new Import Directory to a Document Type:

   a. Click **Administration**.
   b. Select **Correspondence** from the menu.
   c. Select **Documents**.
   d. For the Document Type you wish to configure - Select the **Show** button.
   e. In the section Import Directories, select the **New** button.
   f. Fill in the fields as per the table below.
   g. Select the **Create Document type** Import dir button.
   h.

Field	Description	Example
Default Import Status		reported
Location*	When a document of this type is found by the **Clintel Uploader**, which Location should it be stored under?	Clintel Clinic
Provider	When a document of this type is found by the **Clintel Uploader**, which Provider should it be stored under?	Referral Letter
Check this location? (check box)	True (selected)- Include as a selection in the **Clintel Uploader**. False (unselected) - Do not include as a selection in the **Clintel Uploader**	True

   **denotes mandatory field*

   Please note: This needs to be set up for each Provider against each Document Type.

3. Install the **Clintel Uploader**.

   The Clintel Uploader must be installed on the machine where the files are locally stored (ie not on a network drive like M drive)

4. Configure the **Clintel Uploader**.

   The Clintel Uploader needs to be configured to ensure it places documents in the correct folders.

   a. Where the uploader is running Open a browser: http://localhost:3000/settings/new?type=DocumentImportDir
   b. Select the "provider / location / provider"
   c. Enter the path to the folder where the documents matching that criteria are stored (local - cannot be a network share)

Once the above has been configured and the documents start to be imported, they will need to be matched up to the patients

The follow process to access Unmatched documents from Location/Provider

From a Location / Provider record:

1. Select **Documents** from menu.
2. Select **Match** next to document to be matched.
   a. The document records will display (this screen defaults to unmatched records).
3. Fill in the following details:
   a. Patient (or create new patient).
      i. Provider.
      ii. Document Type - These are predefined values set up by your System Administrator.
      iii. Document Status.
      iv. Date of Document – this is the date taken from the letter/document (not mandatory).
      v. Notes – Fill in who the letter is from / any other important info (this will display in the summary screen).
   b. Select **Update Document** button.