Review and Upload Documents

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How to review and upload documents

You can view, upload or delete files for documentation.

1. From the Dashboard, click the Patient's name.

2. Click on the Documents tab.

You will see a table that contains the following:

- Uploaded by - displays the name of the uploader

- Description - shows the file name

- Size of the document being shared

- Date Uploaded

- Action - this allows you to view or delete the file

* An alternative way for navigation is to click Patients from the menu bar and then click the Patient's name.

Uploading a document/file:

1. Click on **+Upload File.**

2. Select the file that you want to upload.

3. Click on **Open** or hit Enter on your keyboard.

The file will automatically be uploaded to the Patient's account and can be seen once they log in to the Patient Portal.

Viewing or deleting a document/file:

1. Click on the **Documents** tab.

2. On the right side of your selected file, click on **View** to open the file, OR **Delete** to permanently remove it from the Patient's account.

Go back to the Clinician Help Directory

Tags
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