

Document Management

23/10/2024 2:35 pm BST

Summary

In the Treatment Screen you are able to generate and attach documents to the patient's Treatment History. This can be achieved in multiple ways.

Details

Using Document Management

1. When in the Treatment Screen, select the '**Doc Mgmt**' button.

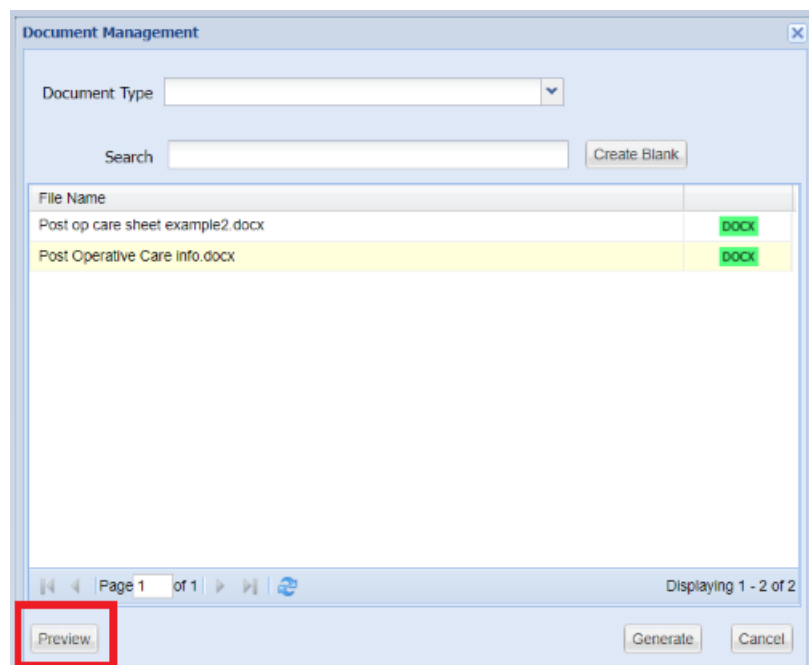
Selecting Document Management will provide you with five options (documented below).

Create New Treatment

This option allows you to search for and generate a Treatment Document from a list of templates.

For information on creating/editing these templates see the [document templates](#) page.

You can also preview the document before printing.



The screenshot shows a 'Document Management' window with a search bar and a 'Create Blank' button. Below is a table with two columns: 'File Name' and 'DOCX'. The table contains two rows: 'Post op care sheet example2.docx' and 'Post Operative Care Info.docx'. The 'Post Operative Care Info.docx' row is highlighted in yellow. At the bottom of the window, there is a 'Preview' button (highlighted with a red box), a 'Generate' button, and a 'Cancel' button. The status bar at the bottom indicates 'Page 1 of 1' and 'Displaying 1 - 2 of 2'.

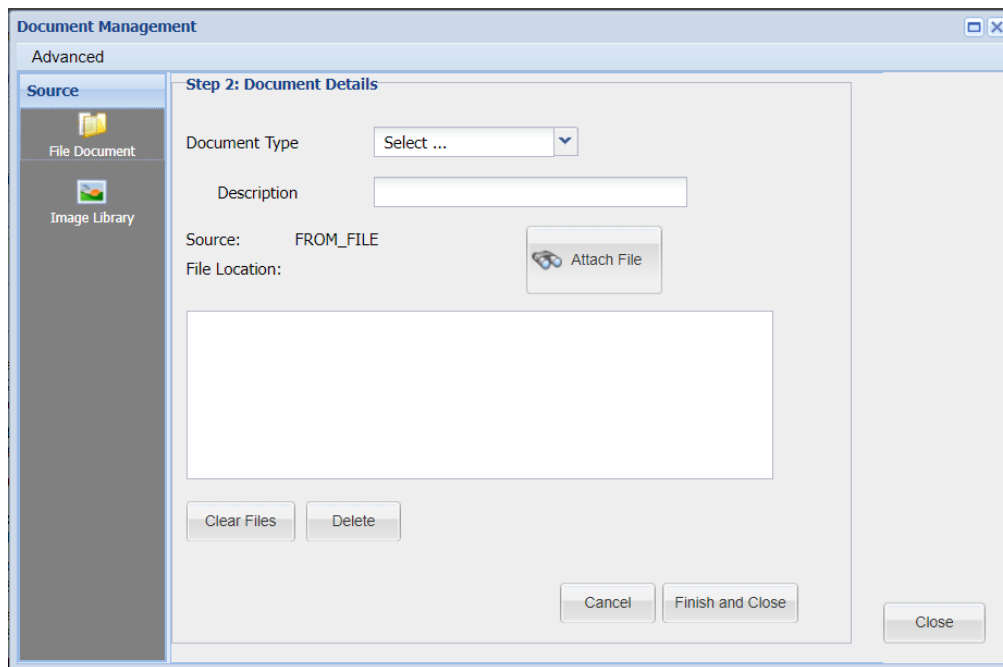
File Name	DOCX
Post op care sheet example2.docx	DOCX
Post Operative Care Info.docx	DOCX

Attach File

This wizard allows you to locate and attach a file/files from your local computer to the patient's treatment history.

Note: The following document file types can be uploaded into the system:

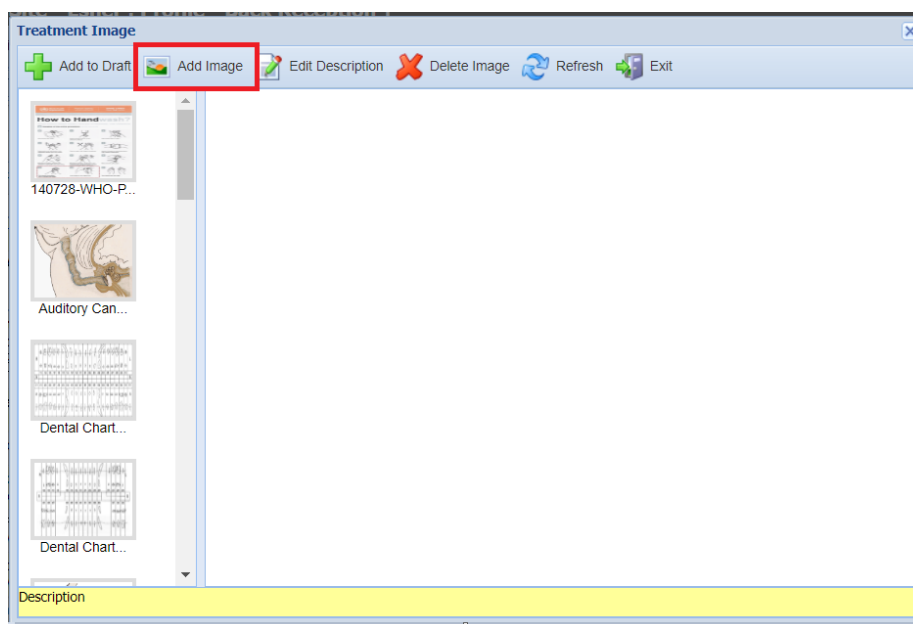
txt,doc,msg,png,jpg,jpeg,pdf,docx,mp4,mp3.



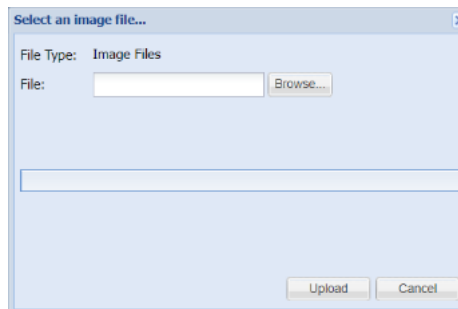
Attach Image

This option allows you to attach a treatment image.

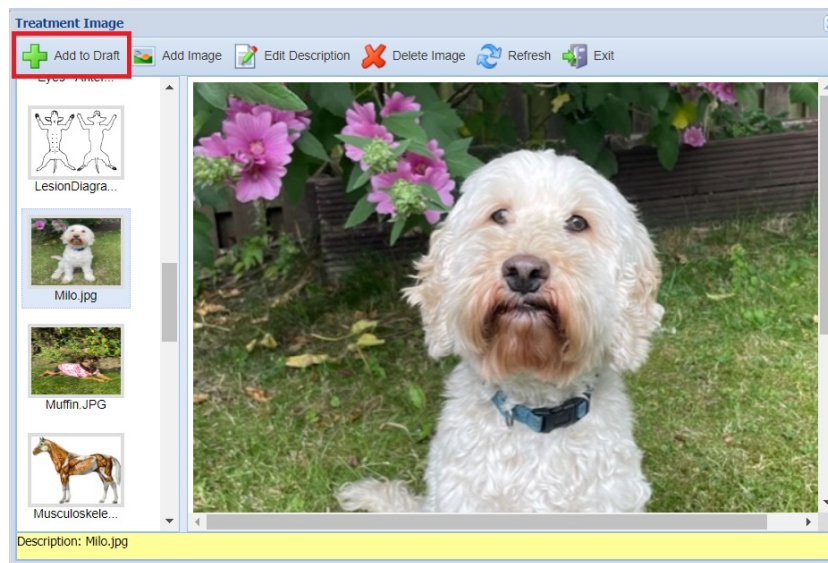
1. Click on **Add Image**



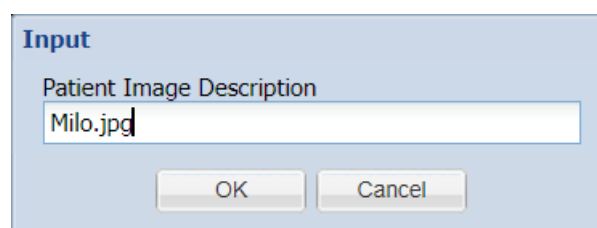
2. Browse for the require image



3. Click on **Add to Draft**



4. Name the image and click **OK**



5. The image will be added to **Drafts**, click on **Save**

6. The image will now be saved to the Clinical History

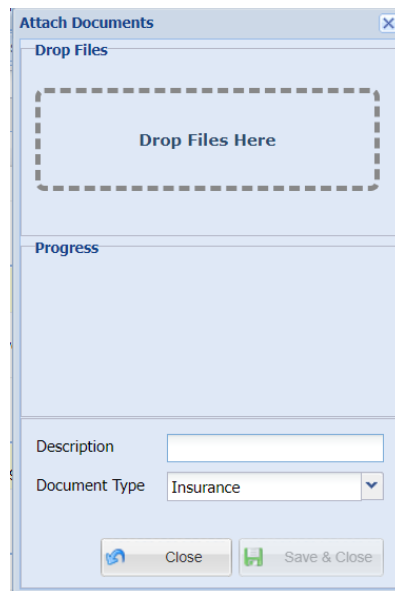
Date: 16/08/2024

	16/08/2024	15:27	Milo.jpg	
	16/08/2024	15:28	Milo.jpg	

Drag & Drop Files

Drag & Drop facilitates the attaching of files to the patient's history.

Locate the document files you wish to attach on your local computer and drag them into the specified 'Drop Files Here' area.



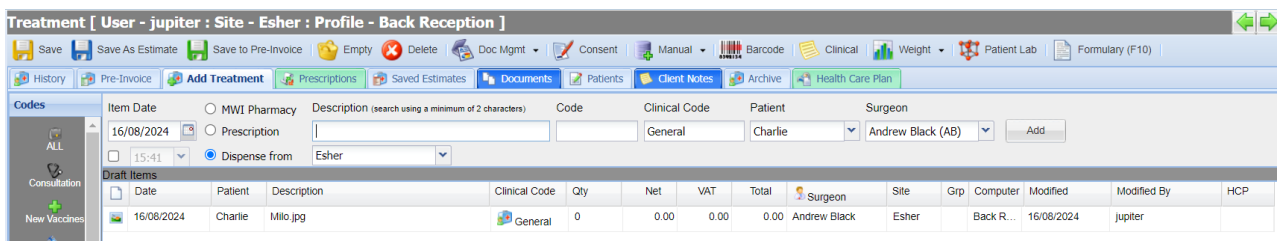
The 'Attach Documents' dialog box is a light blue window with a close button in the top right corner. It contains three main sections: a 'Drop Files' section with a dashed rectangular box labeled 'Drop Files Here'; a 'Progress' section which is currently empty; and a bottom section with a 'Description' text input field, a 'Document Type' dropdown menu (currently set to 'Insurance'), and two buttons: 'Close' and 'Save & Close'.

Note: The following document file types can be uploaded into the system:
txt, doc, msg, png, jpg, jpeg, pdf, docx, mp4, mp3.

Once the files have been dropped, fill in the **Description** and select the **Document Type**, then click on **Save & Close**

Saving Documents to history

Once you have attached a document/s using any of the methods above, the document/s will be added to the Add Treatment draft screen. This gives you the opportunity to add any treatments, services or clinical notes.



The screenshot shows the 'Treatment' window for user 'jupiter' at site 'Esher'. The 'Documents' tab is active, showing a list of draft items. The 'Draft Items' table has columns for Date, Patient, Description, Clinical Code, Qty, Net, VAT, Total, Surgeon, Site, Grp, Computer, Modified, Modified By, and HCP. A single draft item is visible: 16/08/2024, Charlie, M10.jpg, General, 0, 0.00, 0.00, 0.00, Andrew Black, Esher, Back R..., 16/08/2024, jupiter.

Date	Patient	Description	Clinical Code	Qty	Net	VAT	Total	Surgeon	Site	Grp	Computer	Modified	Modified By	HCP
16/08/2024	Charlie	M10.jpg	General	0	0.00	0.00	0.00	Andrew Black	Esher	Back R...	Back R...	16/08/2024	jupiter	

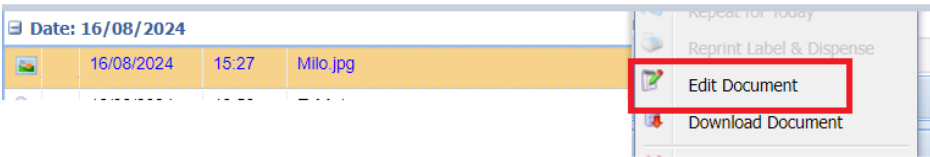
Once you are happy to proceed, select the '**Save**' button to Save to the patient's history.

View Attached Documents

View from Treatment History

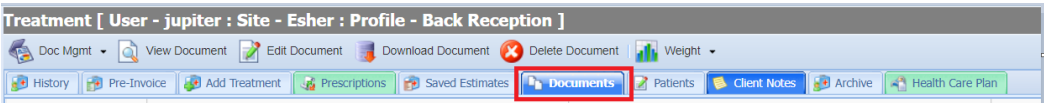
Once the Documents have been saved, they will display under the Treatment History tab.

Double click the documents to view. Right-click the document and select 'Edit document' to edit.



View from Patients History

If documents are attached to a patient's history, the 'Documents' Tab will display in blue. Selecting this tab will show all documents attached to the patient's history.



To view a document, double-click on the item to open the file, or select the file and click on **View Document**.

You can also Select the document and **Edit**, **Download** and **Delete** from this area

