Document Management: Uploading/Importing Multiple Documents for different patients.

07/24/2024 11:39 am EDT

With DrChrono's Document Management tool, you can import several documents for different patients into the software, all in one, easily accessible spot.

1. Hover your cursor over the Clinical tab and click on Document Management.

Clinical	Patients	Reports	Billing
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Form Bui	lder		
Library			
Archive			
Form Rec	order		
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onpatient	Forms		
Macro Bu	uttons		
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2. On the Document Upload Management screen, there are separate tabs for **Upload Files**, **Pending Files**, and **Completed Files**. By breaking out the workflow into different tabs, you can quickly view and keep track of where your files are at regarding upload progress and history.

To upload files, either drag & drop or click on the + Add files button and select the files for upload.

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Upload Files	Pending Files (0)	ompleted Files			
	Bulk Upload Tool				
		Drop	files anywhere onto this page or		
	+ Add files				
	Your Documents				
	Title	Progress	Error	rs	

After loading a file, you'll notice it reflects right away if it was successful or not. To delete a file, click on the red(

) to the right of the document.

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Upload Files	Pending Files (5)	Completed Files			
	Bulk Upload Too	bl			
			Drop files anywhere onto this page or		
	+ Add files				
	Your Documents	5			
	Title		Progress	Errors	
	Lab Results.pdf			No Error	×
	Sample CCDA.pdf			No Error	×
	Sample Insurance Back.pr	ng		No Error	×
	Sample Insurance Front.pr	ng		No Error	×

Note: In a single batch, you can upload 100 files or 100MB of files, whichever limit is reached first.

3. After uploading the desired files, please click over to the **Pending Files** tab. Once on the screen, you can search for files by patient, description, & tags. You also can associate each document with a patient by entering their name in the patient search box.

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4. Add any tags to the documents.

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	۹	2022-04-08	Jennifer Harris 🛛 🖊	Sample CCDA.pdf		previous records ×	Copy Paste	Fax Revise 🖋
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	۵	2022-04-08	Laurie Sample 🔸 🗙	Sample Insurance Front.png		insurance info ×	Copy Paste	Fax Revise Send to onpatient

5. You can preview the document by hovering over the magnifying glass icon (

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) to preview the document. If you want to upload multiple files at once, be sure you check the box next to the document (

\checkmark

) and click **Complete Selected.** You can also upload individual documents by clicking **Complete** for the single file. You can also **Fax** or **Send to OnPatient** (if enabled for the patient) the individual document.

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6. Uploaded files can be viewed under the **Completed Files** tab. If you click **Revise**, the file will be moved back to the **Pending Files** tab for you to adjust.

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Clicking the pencil icon(

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) allows you to update the document information. To save any changes; please click the blue **Update Document** button.

Patient	Laurie Sample		+	-) ×
Title	Sample Insurance Front.png	Date	2022-04-08	
Tags insuranc	e info ≭			
	BlueCross			

BlueCross BlueShield		
Subscriber Name: JOHN DOE Identification Number: XOF123456789		
Group Number: 123456 Coverage Date: 09/01/08 SINGLE	Office Copay Emergency Copay RX Generic Copay RX Brand Copay	\$20 \$100 \$25 \$50/\$100
ONVOLE	RxBIN: 011550 RxPCN: ILDR PPO	PPO R

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