

UPLOADING DOCUMENTS TO MEMBER RECORD



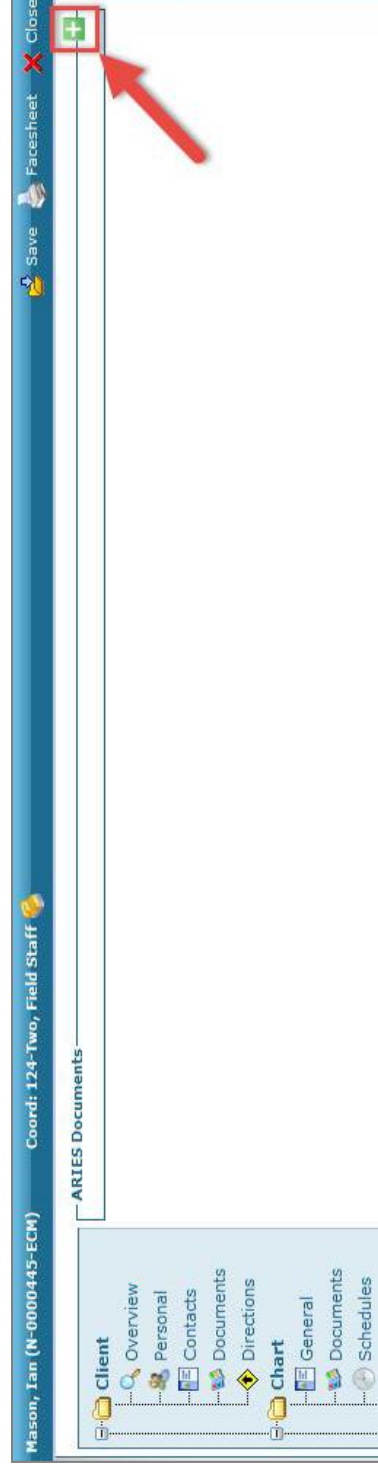
Uploading Documents

- Visit Documents must be scanned to your local computer.
- Navigate to Member/Client you will be uploading the document for.
- Click on the **Documents** link under the Chart folder in the navigation panel.

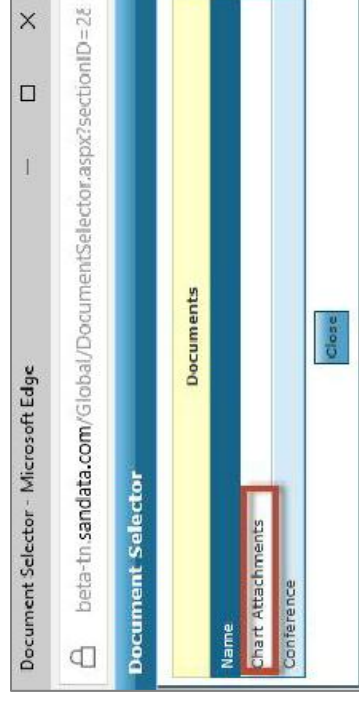
A screenshot of the Sandata ECF system interface. The top navigation bar is blue and contains the text "Mason, Ian (N-0000445-ECM)", "Coord: 124-Two, Field Staff", and icons for "Save", "Facesheet", and "Close". Below this is a navigation panel on the left with a tree structure. The "Client" folder is expanded, showing sub-items: "Overview", "Personal", "Contacts", "Documents", "Directions", "Chart", "General", "Documents" (highlighted with a red rectangle), "Schedules", "Permanent", "Compliance", "Invoices", "Diagnosis", "Quick Reports", and "FaceSheet". The main content area is white and contains several sections: "Personal" (Mason, Ian; N-0000445-ECM; Current/Billing Address: 3200 West End Ave, Nashville, TN 37203; Home: (631) 656-6384), "Admission and Other Dates" (ROC: 03/05/2018-Mon; SOC: 01/01/2018-Mon; EOC: Born: **/**/1955-Sun), "Physician", "Referrer Contact", "Contacts", "Admission Manager", "Referral Source", "Current Certification", and "Directions".

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- Select the Green + symbol at the top right of the page.

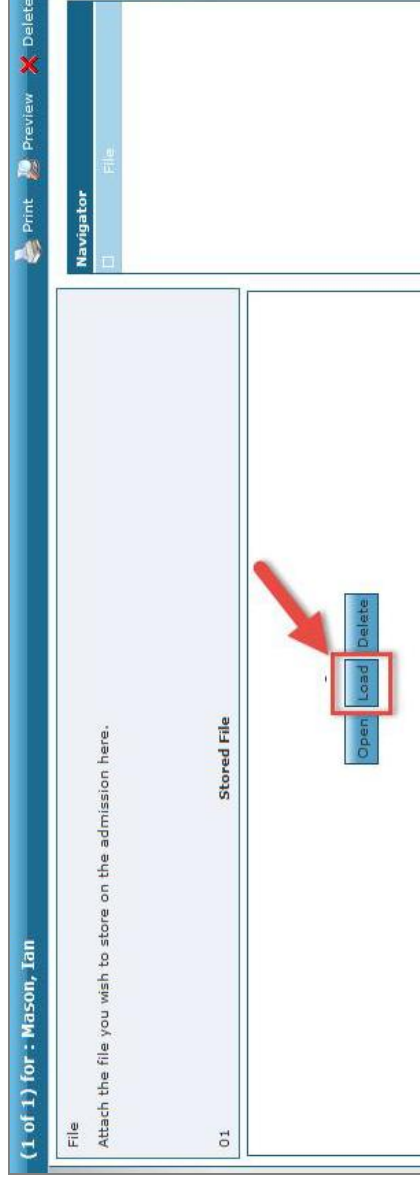


- Select the Chart attachments from the dialog window by double clicking on the line.

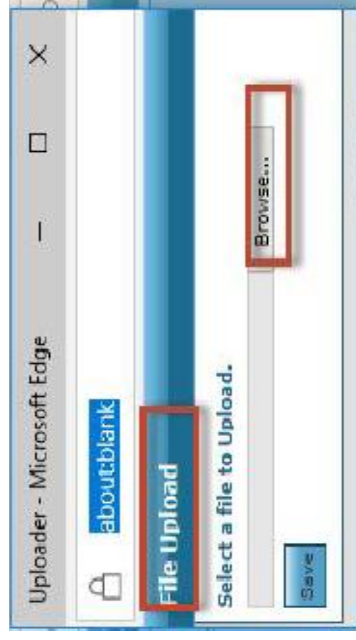


Uploading Documents

- Select Load from the next dialog window.

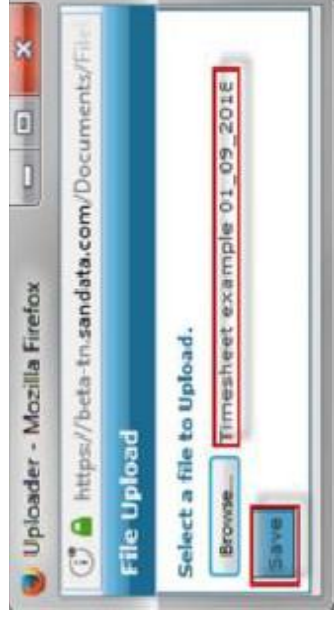
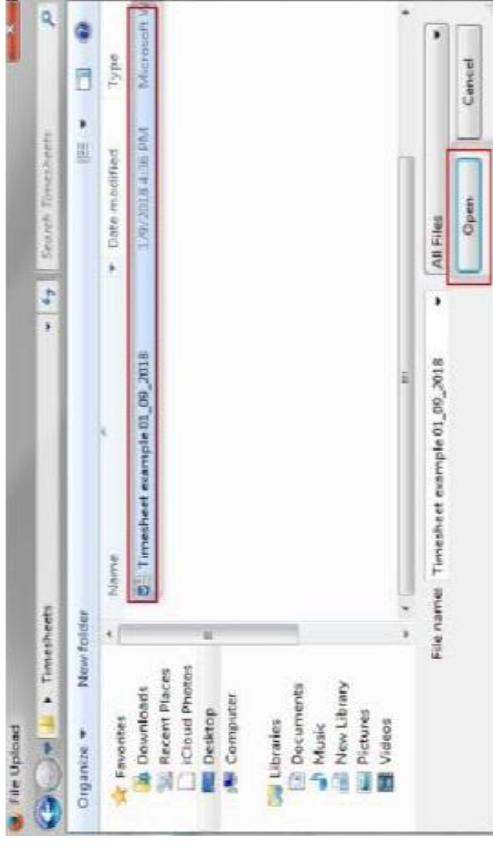


- From the File Upload select the Browse option in the dialog window.

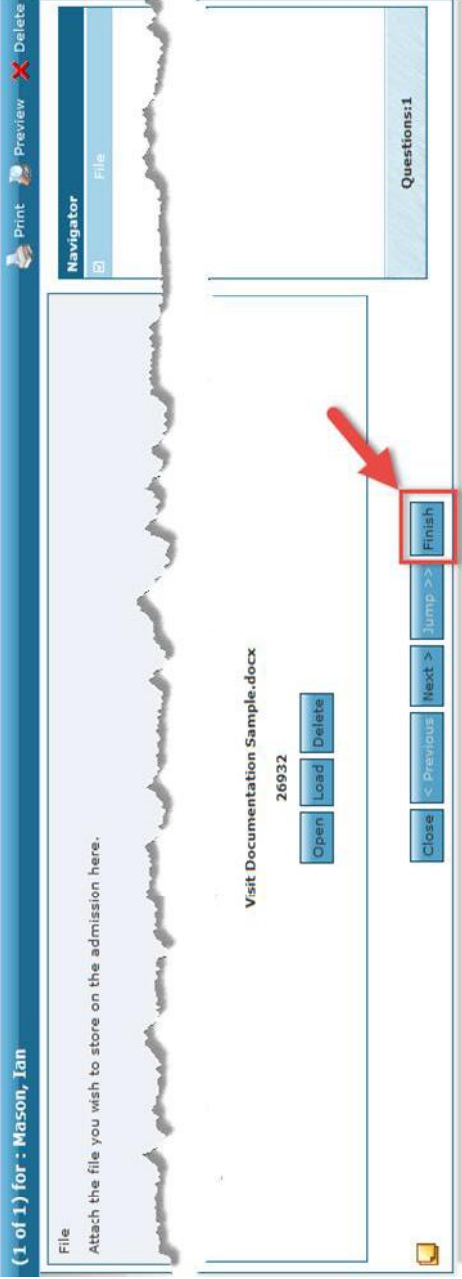
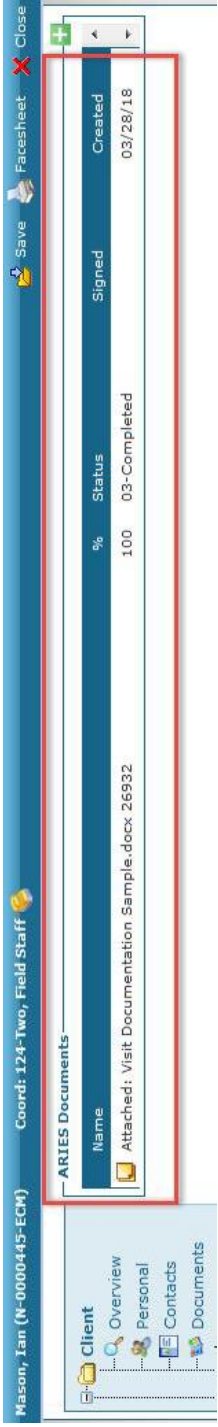


Uploading Documents

- Located the Document you have saved to your local computer, select that document and click open.
- Confirm you have the correct document and select save.



Uploading Documents

- Select **Finish** at the bottom of the page.
- 
- Confirm that the document was uploaded by double clicking to open and view.
- 
- All uploaded files can be viewed from the **Documents** screen.