Documents

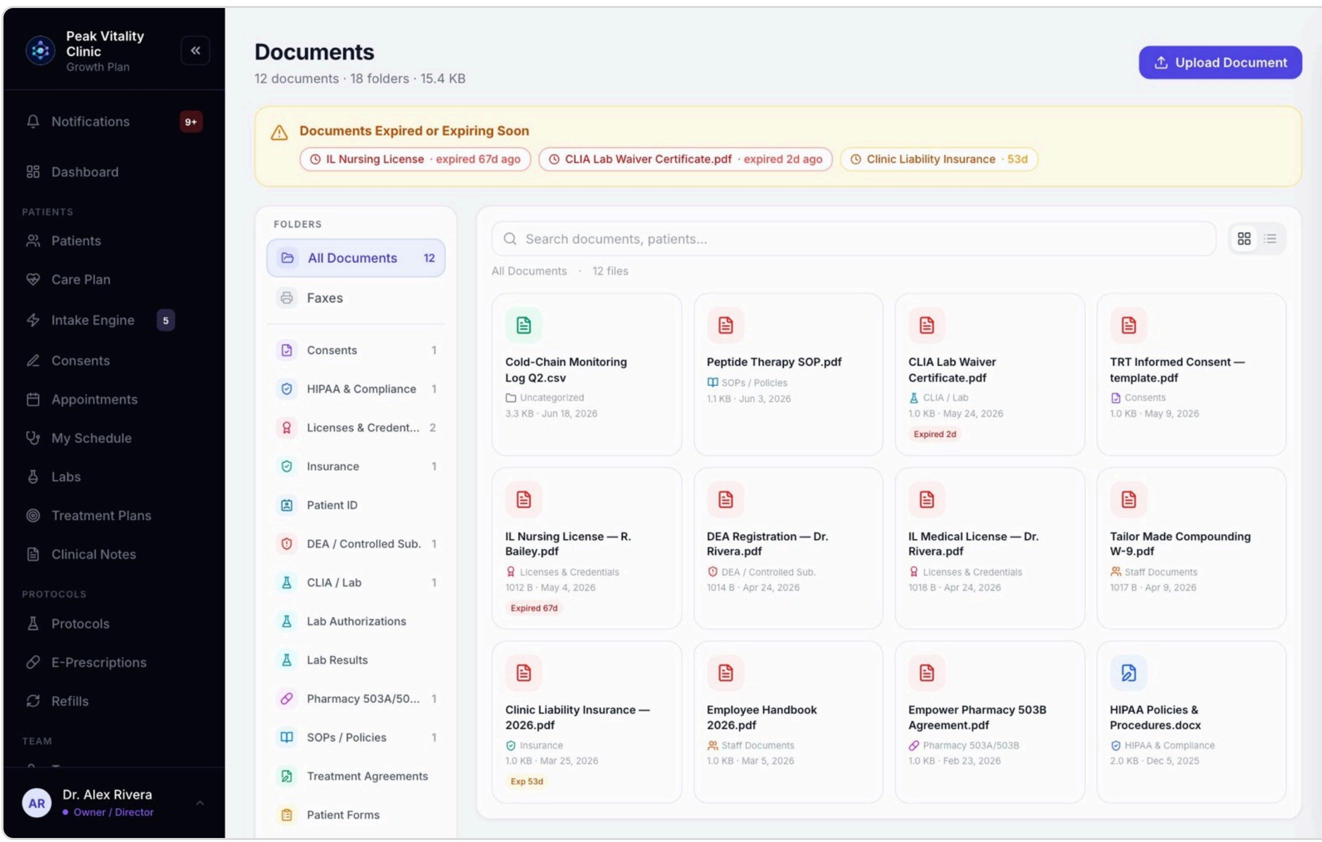
Every file your clinic keeps, sorted into folders. Upload, find, send for signature, and send and receive faxes.

Page manual · For Everyone who handles patient files · aminova.health/university/documents

1. THE PAGE AT A GLANCE

On the left are your folders, with **Faxes** near the top. In the middle are the files in the folder you picked. Click a file and its details open on the right.

The top of the page says how many documents you have. Above the files, a yellow box lists anything about to expire, and a blue box counts documents waiting for a patient to sign.

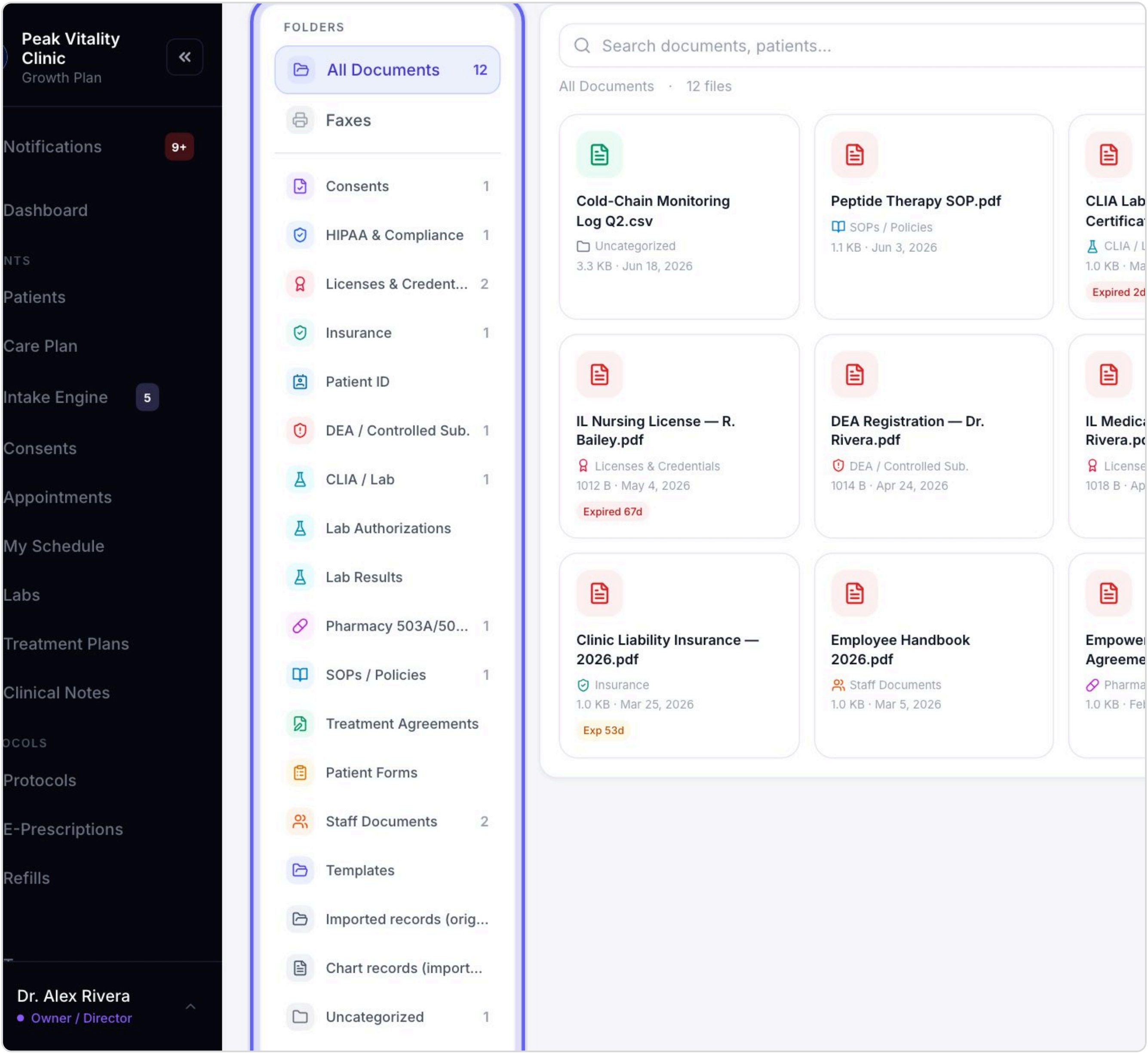


Documents: folders on the left, files in the middle.

2. FOLDERS

1. **All Documents** shows everything.
2. Every file lives in one folder, like **Consents**, **Licenses & Credentials**, **Lab Results** or **Staff Documents**. The number beside a folder is how many files are in it.
3. Click a folder to see only what is inside.

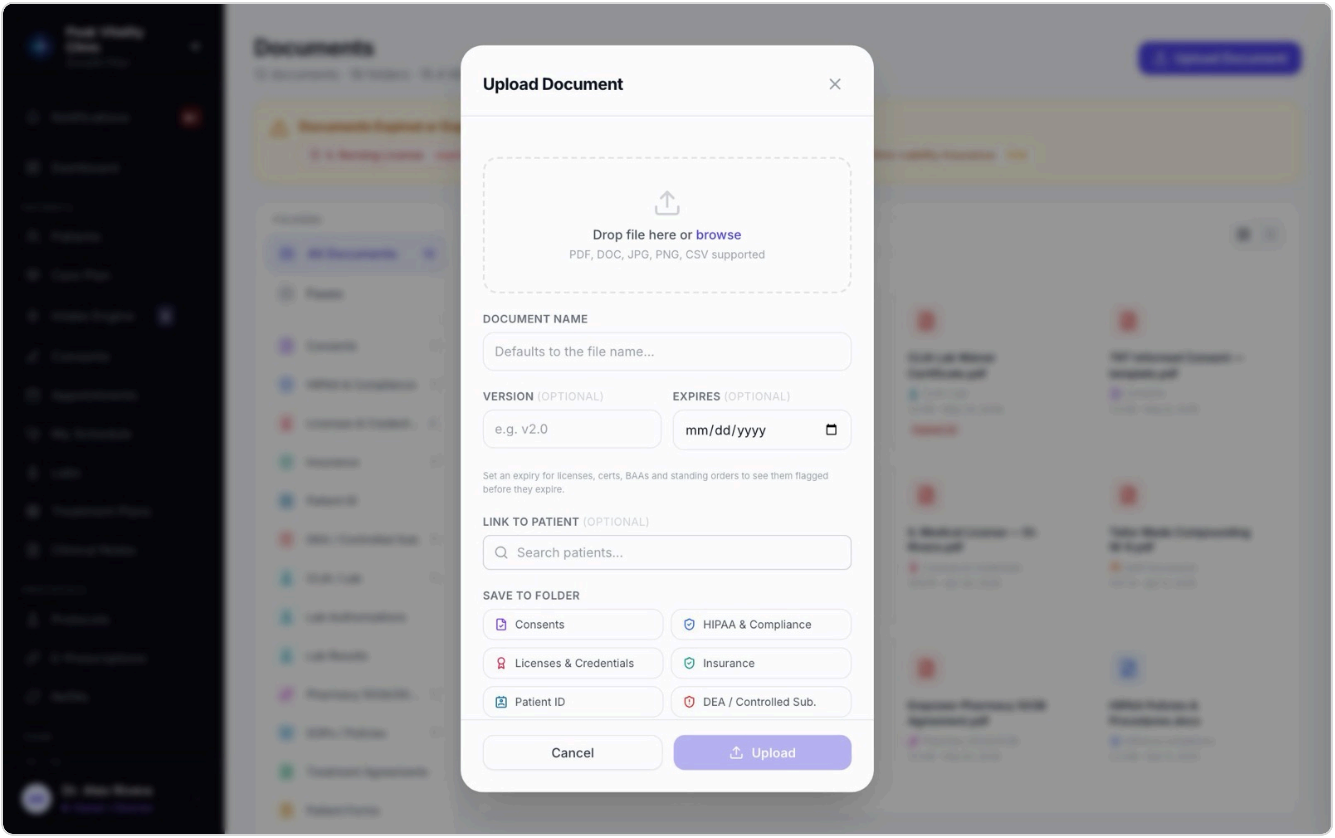
4. **Uncategorized** holds files that aren't in any other folder.



The folders, with how many files are in each.

3. UPLOAD A DOCUMENT

1. Click **Upload Document**.
2. Drop a file in the box, or click it to browse. PDF, Word, JPG, PNG and CSV files work.
3. Give it a **Document Name**, or leave it to use the file name.
4. Add a **Version** and an **Expires** date if it has them.
5. Under **Link to Patient**, pick the patient if the file is theirs.
6. Pick a folder under **Save to Folder** and press **Upload**.

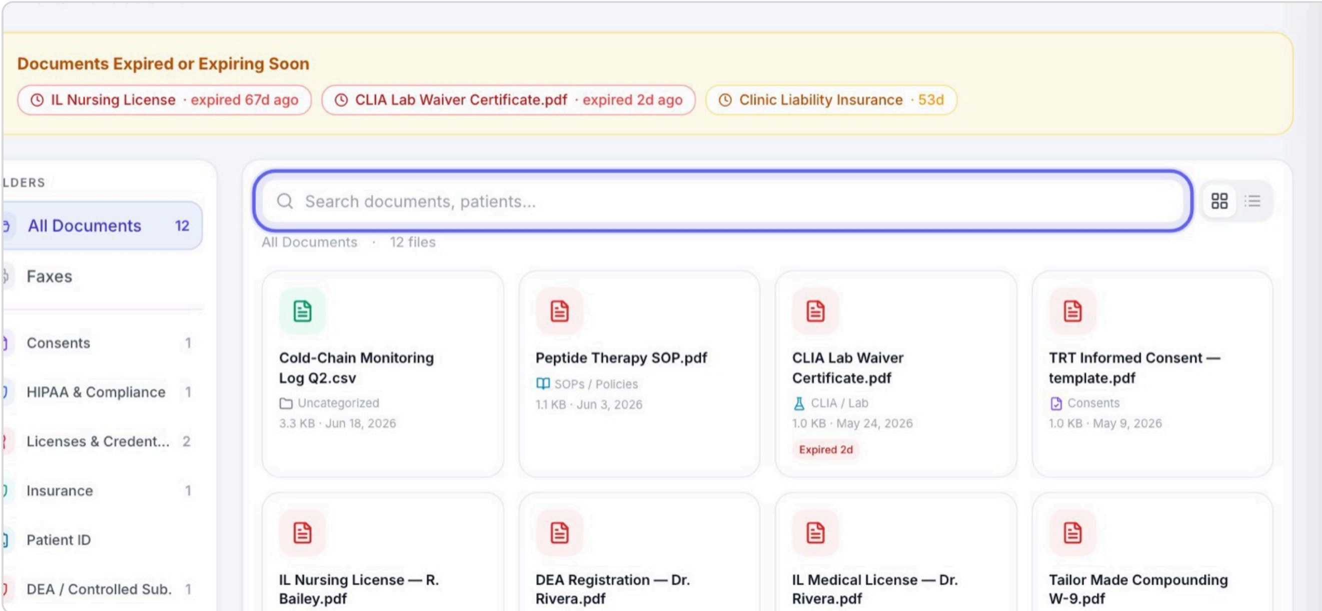


Upload Document: the file, its name, the patient and the folder.

Tip. Give licenses, certificates, agreements and standing orders an expiry date. They are flagged before they run out.

4. FIND A DOCUMENT

1. Type in **Search documents, patients...** to find a file by its name or by the patient's name.
2. The two buttons beside the search switch between cards and a list.
3. A long folder is split into pages. Use the arrows and page numbers at the bottom.



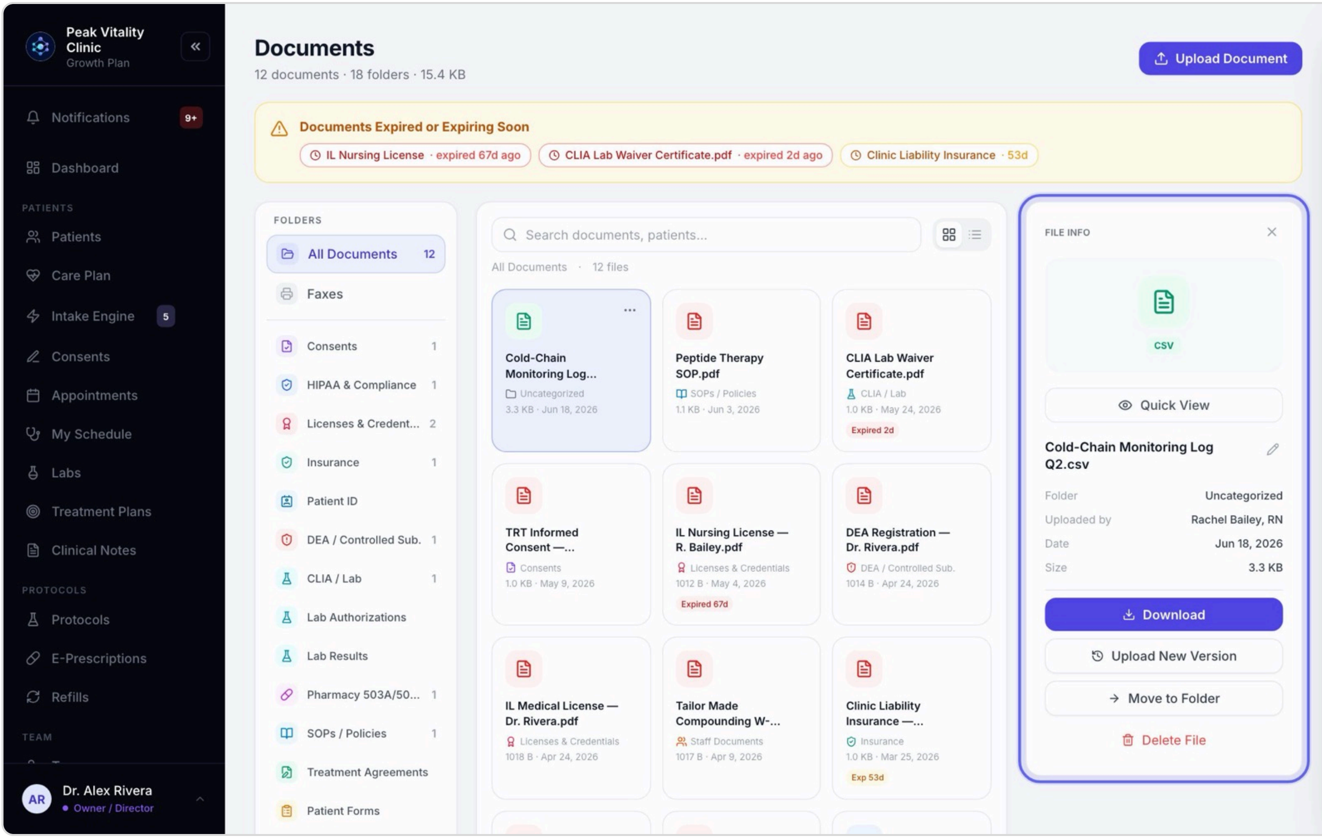
Search by the document's name or the patient's name.

5. THE TAGS ON EACH FILE

1. The first name in purple is the patient the file belongs to.
2. **Exp** and a number counts the days until it expires. **Expired** shows in red.
3. **Pending sig.** means it went to a patient to sign. **Signed** means they did.
4. **Superseded** means a newer version was uploaded.

6. ONE DOCUMENT

1. Click a file. Its details open on the right: folder, who uploaded it, date, size, and when it expires.
2. **Quick View** opens the file right on the page. **Download** saves a copy.
3. **Upload New Version** adds a newer copy. The old one is kept and marked **Superseded**.
4. **Move to Folder** files it somewhere else. The pencil renames it.



A document, opened: its details and what you can do with it.

Tip. The **...** menu on each file has the same choices, without opening it.

7. SEND A DOCUMENT FOR SIGNATURE

1. Open a file in **Consents** or **Treatment Agreements** and press **Send for Signature**.
2. For a PDF, place where the patient signs and dates it, then save.
3. Pick the patient under **Send to Portal Patient** and press **Send to Portal**.
4. The patient sees the request the next time they open their patient app. The file shows **Pending sig.** until they sign.

Tip. For the forms you send to every patient, use the Consents page instead. It tracks who has signed what.

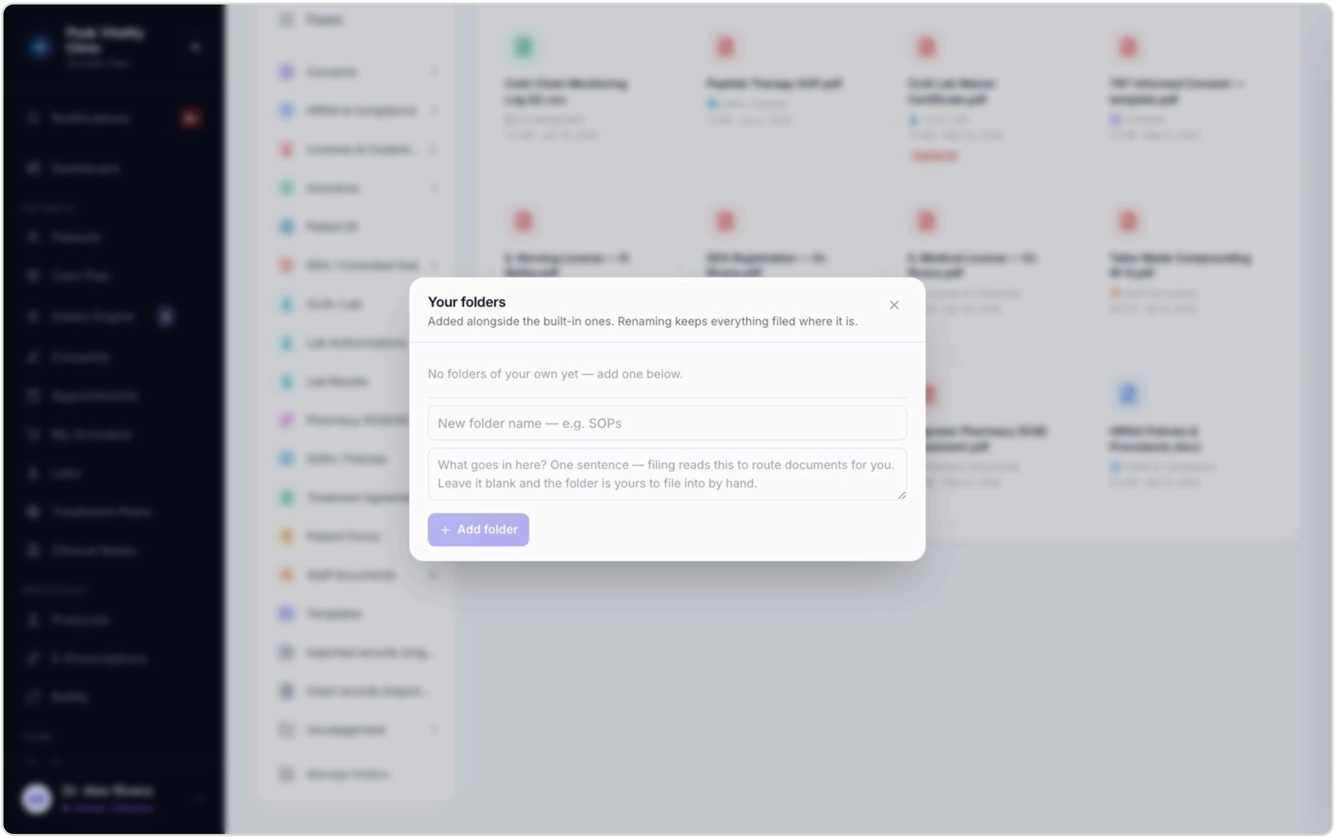
8. DELETE A DOCUMENT

1. Open the file and press **Delete File**, or pick **Delete** in its **...** menu.
2. A box names the file and asks you to be sure. A deleted file can't be brought back.
3. Only owners and managers can delete.

Tip. If the same file was uploaded twice, an amber button appears at the top that says how many copies it found. It keeps the oldest one and removes the rest.

9. YOUR OWN FOLDERS

1. Click **Manage folders** at the bottom of the folder list.
2. Type a **New folder name**. Add one sentence on what goes in it, or leave it blank to file into it by hand. Press **Add folder**.
3. Use the pencil to rename a folder. Its files stay where they are.
4. Use the trash can to remove one. It asks where its files should go, then press **Move and remove**.



Your folders: add, rename or remove your own.

10. FAXES

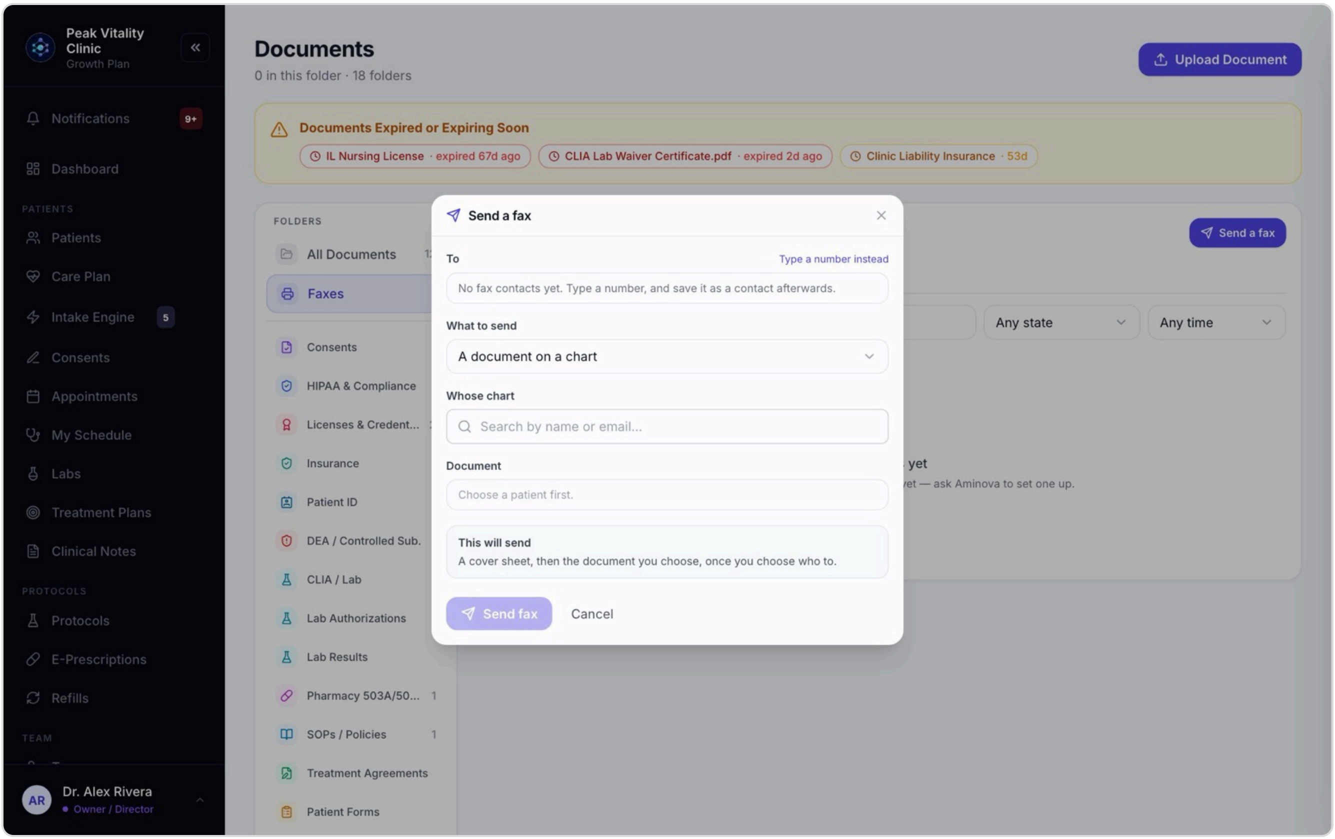
1. Click **Faxes** in the folder list. The red number is how many new faxes you haven't read.
2. Your clinic's fax number shows at the top. Click it to copy it.
3. The **Received** tab lists faxes sent to you. Click **Open** to read one, and **Mark read** when you're done.
4. Search by sender, number or patient, or filter by state and date.

11. FILE A FAX TO A CHART

1. A new fax isn't on anyone's chart yet. It shows a red **Needs a patient** tag.
2. Click the tag, then search for the patient. Picking them files it to their chart.
3. Not in the system yet? Pick **Add a new patient** in the same search.
4. Click the tag icon to save the sender's name, so it shows on every fax from that number.

12. SEND A FAX

1. Click **Send a fax**.
2. Under **To**, pick a saved contact, or click **Type a number instead**.
3. Under **What to send**, choose **A document on a chart**, **A file from this computer** or **A records request**.
4. Pick the patient and the document, or choose the file. A file can be up to 10 MB and 49 pages.
5. Check **This will send** and press **Send fax**. A cover sheet is added for you.



Send a fax: who to, what to send, and what will go.

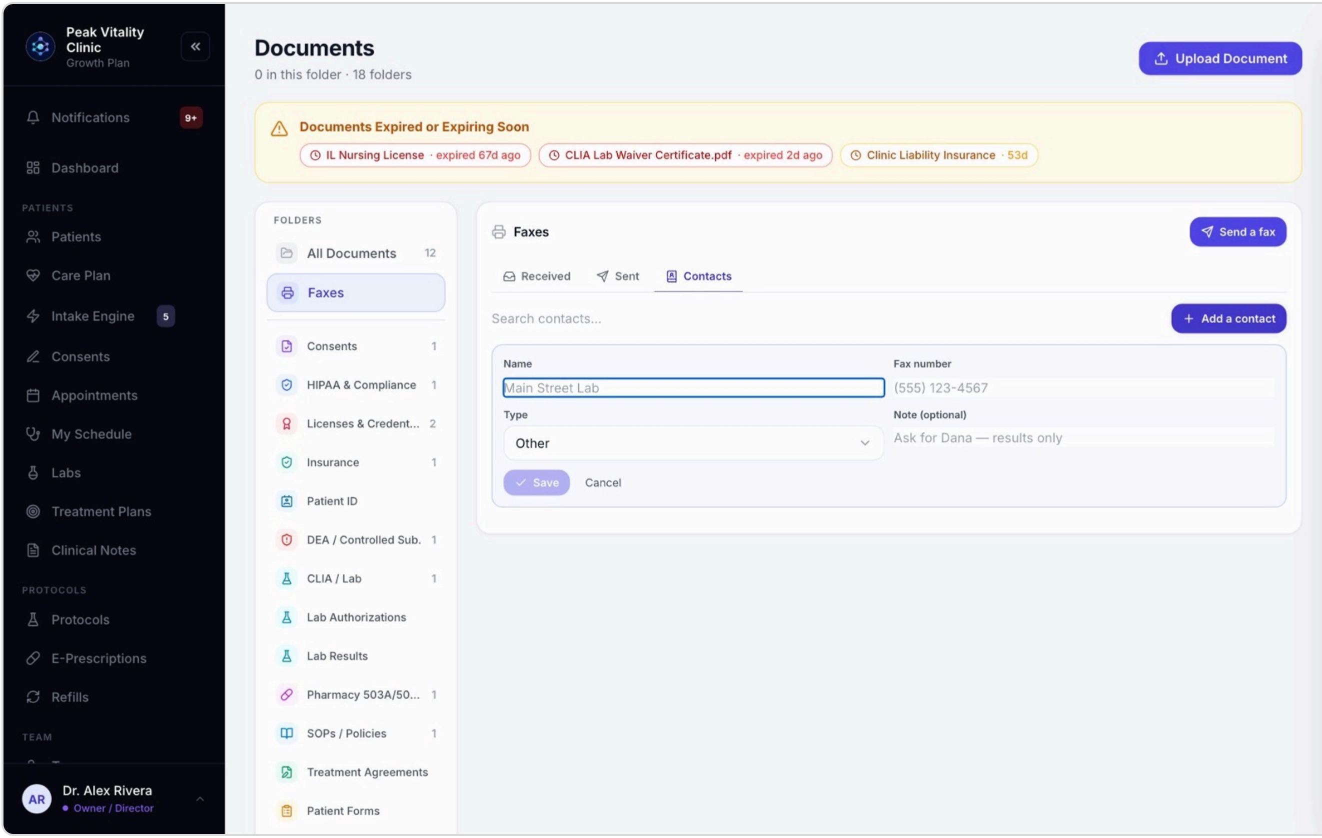
Tip. A records request only goes with the patient's signed release. An unsigned form is refused.

13. SENT FAXES

1. The **Sent** tab lists every fax you sent, with its state: **Queued**, **Sending**, **Sent**, **Failed** or **Needs checking**.
2. A failed fax shows the reason it didn't go, like a number that is out of service.
3. The red number on the tab is how many need a look.

14. FAX CONTACTS

1. The **Contacts** tab keeps the fax numbers you use, by name.
2. Click **Add a contact**. Fill in the **Name**, **Fax number**, **Type** and a **Note** if you like, then press **Save**.
3. Pick a contact under **To** when you send a fax.



Add a contact: a name, the fax number, what kind of contact it is, and a note.