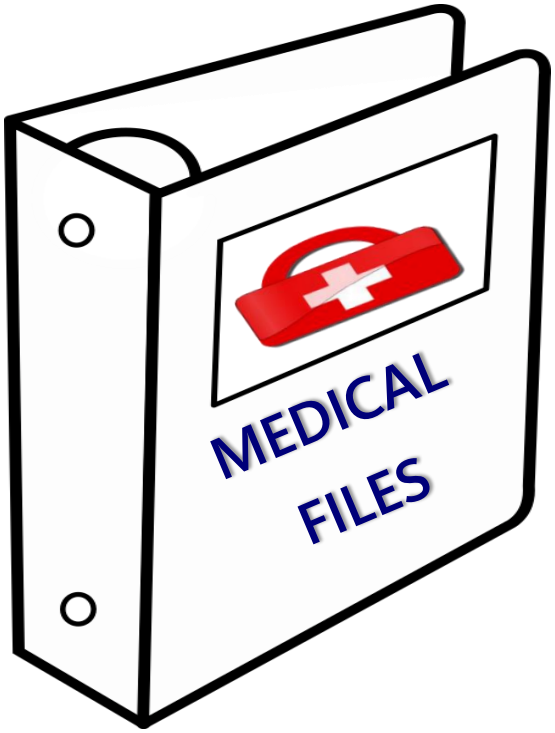
SEARCHING, SCANNING & UPLOADING DOCUMENTS





DOCUMENT LIBRARY

Revised: 07/08/24

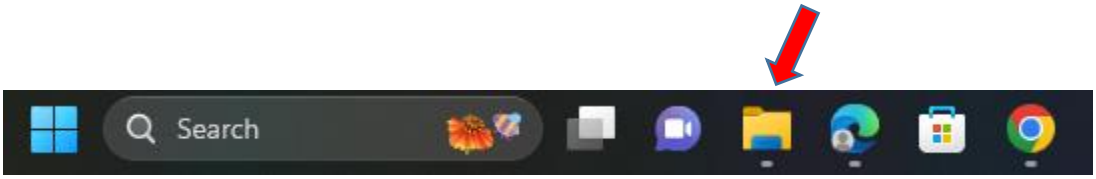
Table of Contents:

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- Document Library pgs. 6
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- Document Library: Uploading pgs. 7-11
- Labeling Medical Documents in Carelogic pgs. 12-13
- Documents NOT listed in Carelogic pg. 14
- INSTANCE DATE ERROR pg. 14
- Scanning Support pg. 14

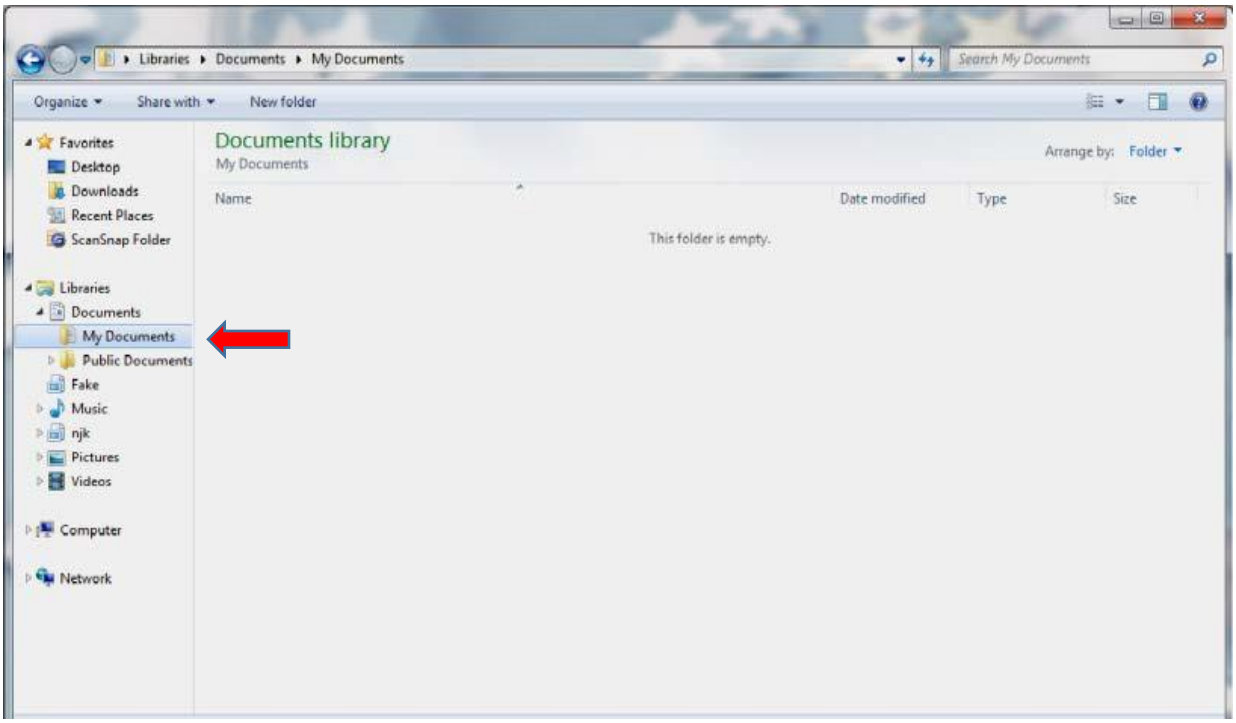
CREATING A DOCUMENT FOLDER

Before you begin scanning, we suggest you create a *Document Folder* on the computer desktop named the Master File or Medical File for each member you are scanning. This will keep all documents scanned for the member(s) organized and easily accessible when uploading. To do this follow below:

Step 1:
CLICK on the **"Folder File Icon"** shown below



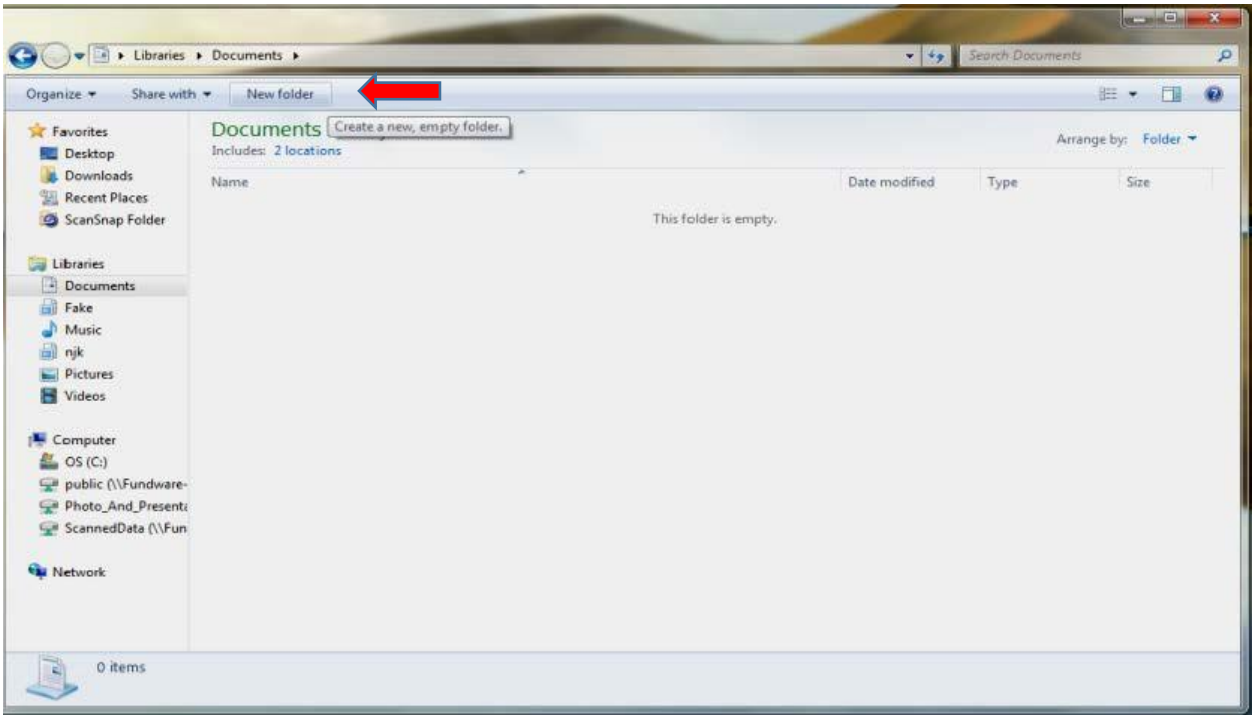
Step 2:
SELECT *"My Documents"*



CREATING A DOCUMENT FOLDER (cont.)

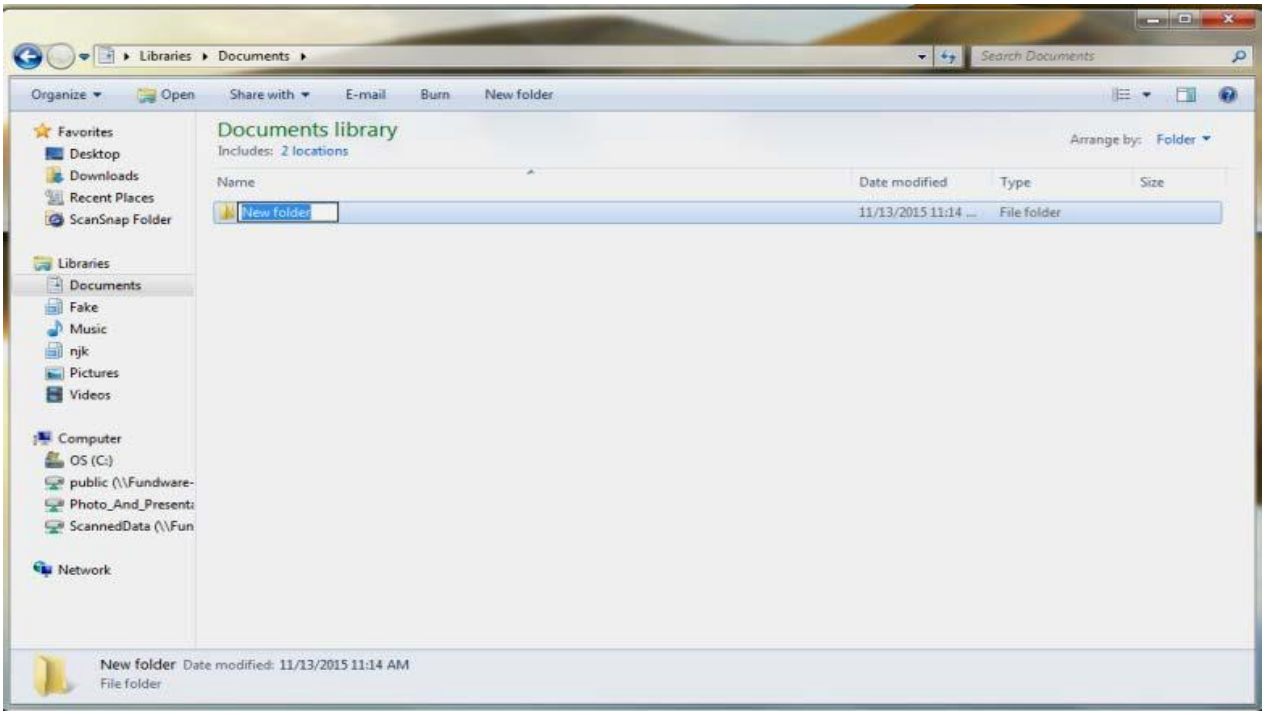
Step 3:

CLICK on ***"New Folder"***



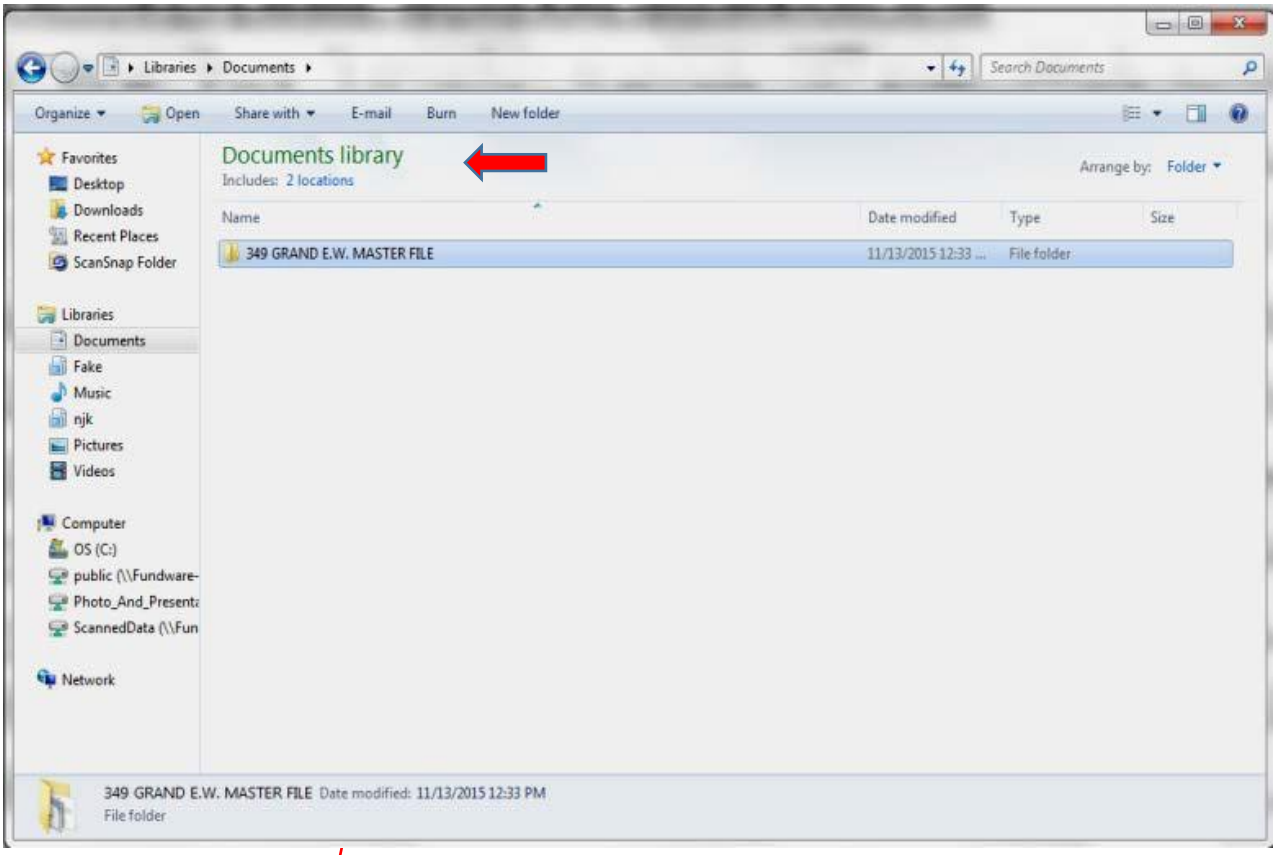
Step 4:

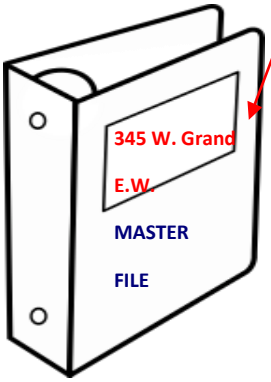
NAME the folder as Program Name – Member Initial – Medical File.



CREATING A DOCUMENT FOLDER (cont.)

Once the folder is created, you can start scanning and saving the member's documents for uploading to the Document Library.





DOCUMENT LIBRARY

Anything on paper should be scanned into Carelogic.

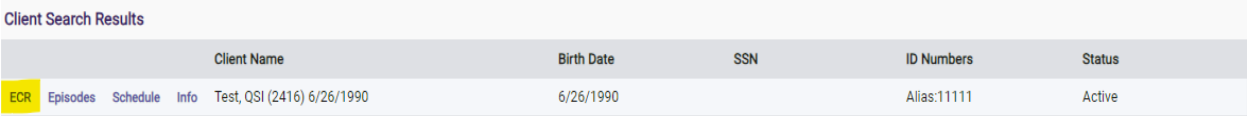
Step 1:

Type the member's name into the "Client Search" box.



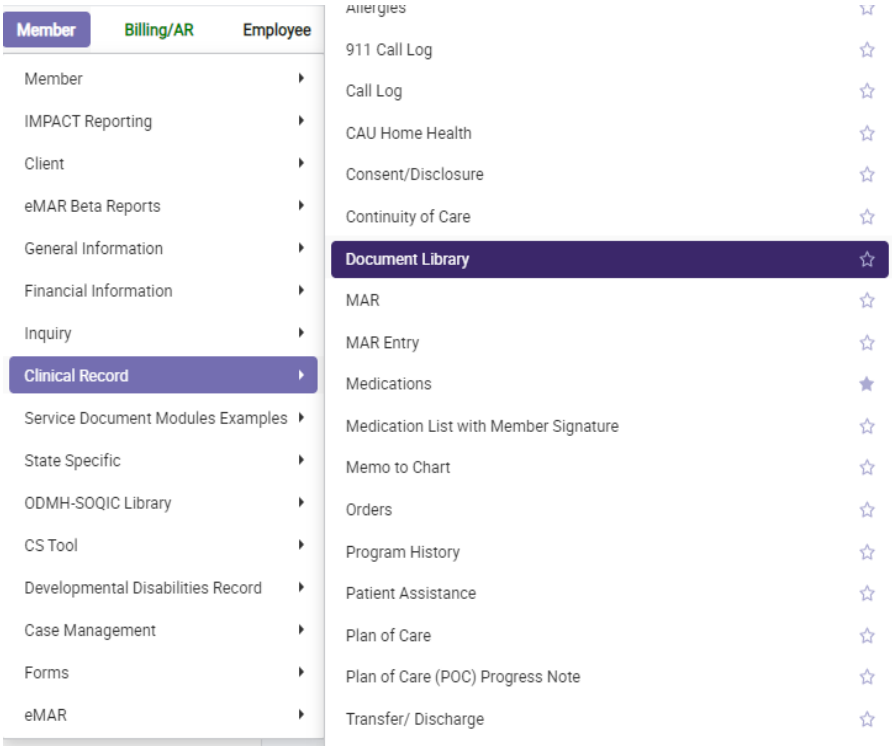
Step 2:

Click the **ECR** button next to the member's name.



Step 3:

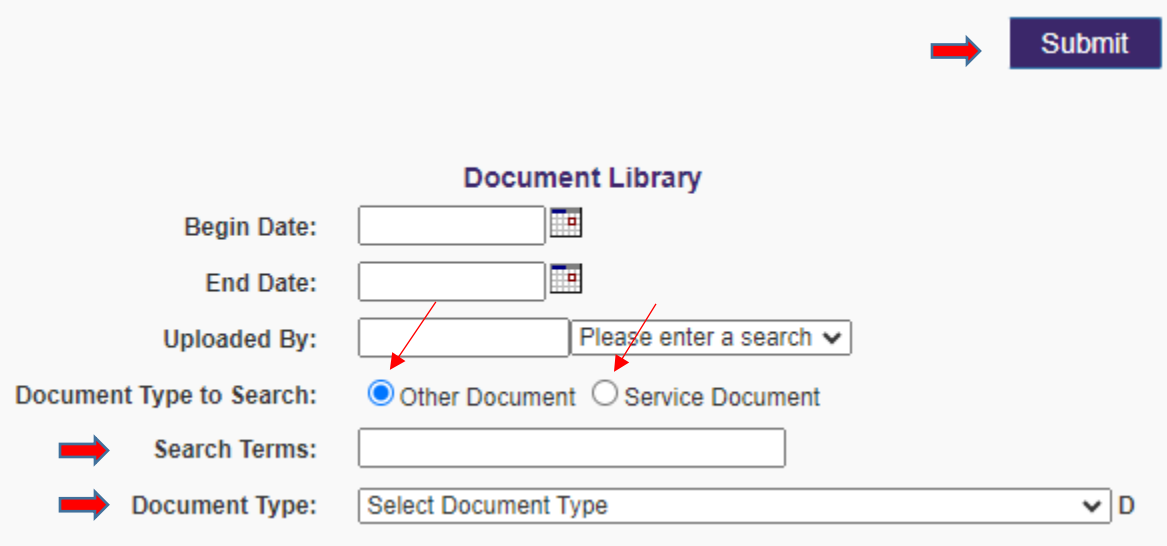
Follow dropdown menus: MEMBER – CLINICAL RECORD – DOCUMENT LIBRARY (Click on Document Library).



DOCUMENT LIBRARY: SEARCHING

There are two types of documents "**Non-Service Document"** (also known as **Other Document**) & "**Service Document**".

- "**Other Document"** is automatically selected by default.
- From the drop down menu of "**DOCUMENT TYPE"** you will be able to see what documents are classified as "**OTHER DOCUMENT".** If you select: **"SERVICE DOCUMENT"** and click SUBMIT (**located in the top right)** you will be able to see the documents that are classified as **SERVICE DOCUMENT.**
- **"SEARCH TERMS"** is a search feature. You can type any keyword or name to search for what you don't see in the drop down list.



DOCUMENT LIBRARY: UPLOADING

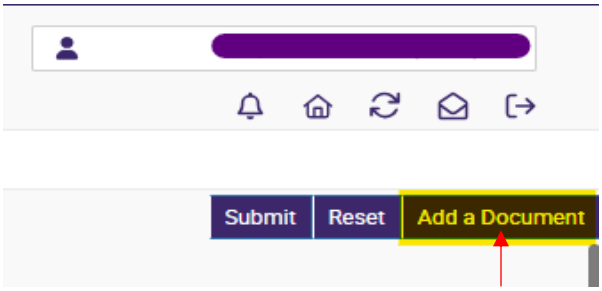
NOTE: ALL DOCUMENTS SHOULD BE UPLOADED SEPERATELY ACCORDING TO DATE. Example: A CONSULT SHEET DATED 04-09-2024 SHOULD NOT BE UPLOADED WITH ANOTHER CONSULT SHEET DATED 04-01-2024. Each Consult Sheet should be uploaded as below:

Search Results

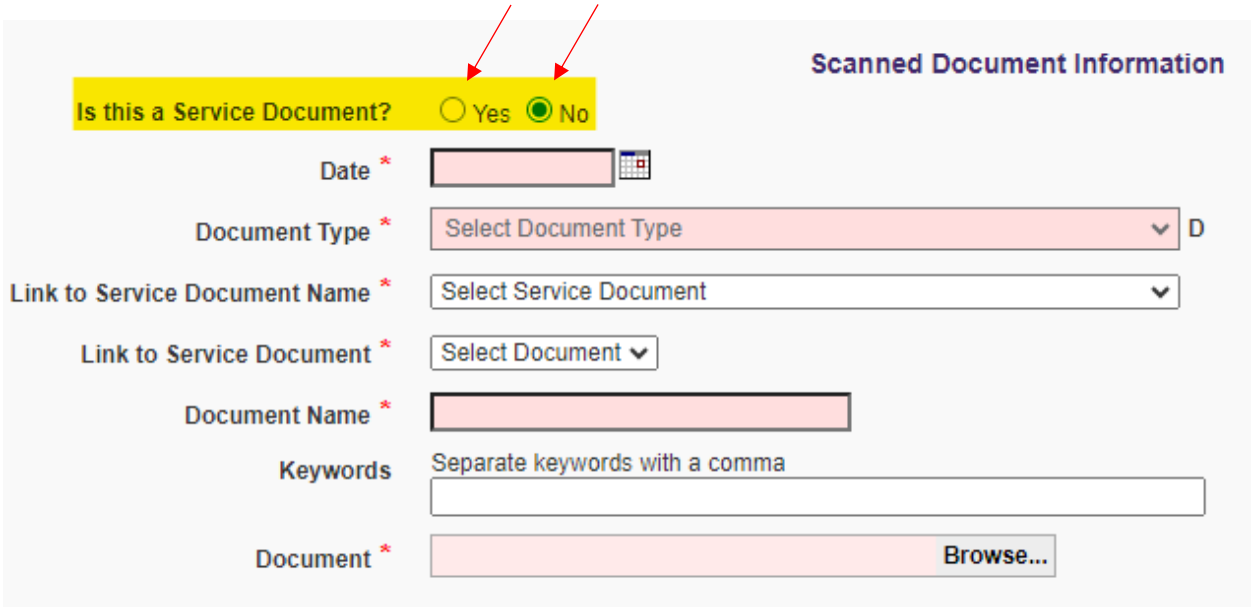
Service Date	Uploaded By	Document Name	Document Type	Keywords
4/9/2024	[redacted]	Psychiatry	Consult Sheet	psychiatry, quarterly, discontinue, new medication
4/1/2024	[redacted]	Podiatry	Consult Sheet	podiatry, trimming, surgery

DOCUMENT LIBRARY: UPLOADING (cont.)

Step 1:
CLICK on **Add a document** to add a document **(located in the top right)**



Determine if you are uploading a **"SERVICE DOCUMENT"** or **"OTHER DOCUMENT"**



Other Documents
Examples:
- Birth Certificate
- Social Security Card
- Social Security Information/Awards Letter
- Lease
- State ID
- Paystubs

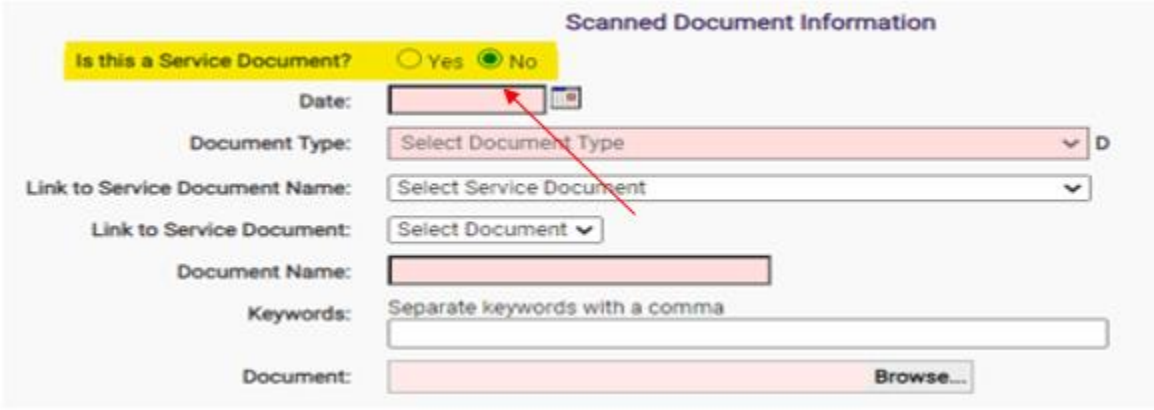
Service Documents
Examples:
- CAU Good News Letter
- Person Centered Planning Tool-NJ DDD
- NJ DDD Individualized Service Plan
- NJ DDD ISP Modified Plan

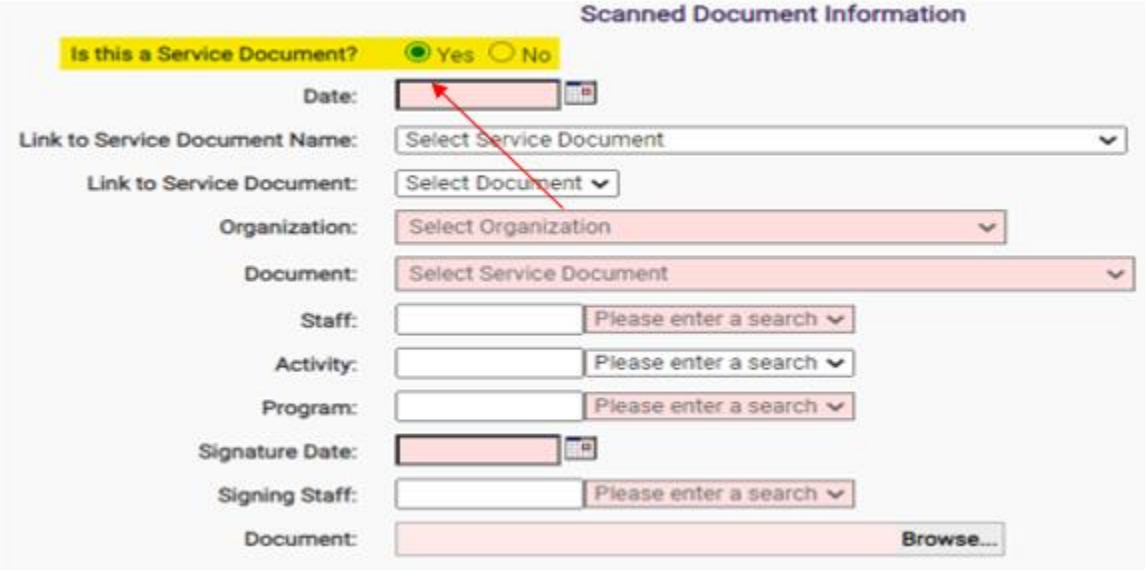
Note: List of Other Documents & Service Documents will show on drop down menu of "Document Type"

DOCUMENT LIBRARY: UPLOADING (cont.)

Step 2:

For "**OTHER DOCUMENTS" Select "NO**". For "**SERVICE DOCUMENTS**" **SELECT "YES".**

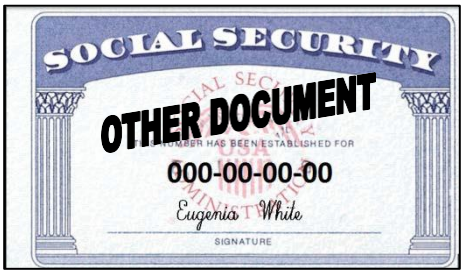




DOCUMENT LIBRARY: UPLOADING (cont.)

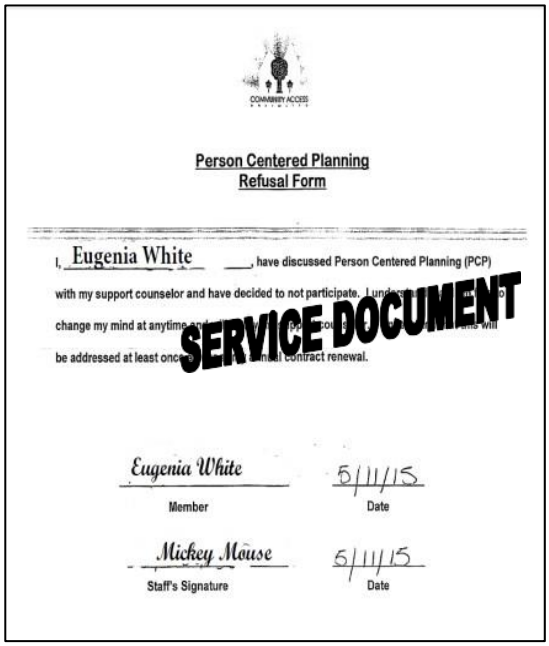
Step 3:
OTHER DOCUMENT

CLICK on the **"DATE"** box. Date should **ALWAYS** be the **"DATE ON THE DOCUMENT" (NOT the date of the upload).** EXCLUDING documents such as Social Security Cards, and Birth Certificates, etc.



SERVICE DOCUMENT

CLICK on the **"DATE"** box. Date should **ALWAYS** be the **"THE DATE ON THE DOCUMENT" OR THE "SIGNATURE DATE"** LOCATED ON THE DOCUMENT ITSELF, **(NOT the date of the upload).** EX. DATED 5/11/2015 (pictured below).



DOCUMENT LIBRARY: UPLOADING (cont.)

Step 4:
OTHER DOCUMENTS

- **SELECT** the "**DOCUMENT TYPE"** from the drop down list.
- **NAME** the document (EX. SOCIAL SECURITY CARD)
- **KEYWORDS: LEAVE BLANK (Unless required)**

SERVICE DOCUMENTS

- **SELECT** the **"ORGANIZATION"**, which is the program group home from the drop down list.
- **SELECT** the "**SERVICE DOCUMENT"** from the drop down list.
- **TYPE:** the name of the staff who is indicated on the document in the "**STAFF"** box. If there is no name, then the name of the staff who is uploading the document.
- **ACTIVITY BOX**: **LEAVE BLANK**
- **PROGRAM: TYPE D AND PRESS TAB (SYSTEM WILL AUTOMATICALLY UPDATE)**
- **SIGNATURE DATE: date should ALWAYS be "THE DATE ON THE DOCUMENT" OR THE "SIGNATURE DATE" LOCATED ON THE DOCUMENT. (NOT the date of the upload)**
- **SIGNING STAFF:** Type the staff name who signed the document in the Search box and **SELECT** it. **(IF THE DOCUMENT DOES NOT HAVE A STAFF SIGNATURE OR HAS A STAFF MEMBER WHOM IS NO LONGER EMPLOYED, SELECT THE MEMBER'S PROGRAM AED FOR BOTH SIGNATURES).**

Step 5:
SELECT "BROWSE":
Browse for the document (from the document uploads you have already scanned and saved on the desktop)

Step 6:
CLICK SUBMIT

Step 7:
Now, in the document library, you can see the document you uploaded. The document library has a lot of room so don't be scared to fill it!

LABELING MEDICAL DOCUMENTS IN CARELOGIC

In order for us to easily find consult sheets, progress notes etc., please be descriptive when saving the documents after uploading them to Carelogic such as:

- **PCP Consult Sheet 2.15.24**
- **Derm Consult Sheet 3.15.24**
- **Dental Progress Note 2.5.24**
- **Phys Ther Consult Sheet 8.5.23**
- **Annual Physical 2024**
- **Annual GYN 2024**
- **ER Consult Sheet / visit 3.20.24**
- **PCP f/u Consult Sheet 8.13.23**

(Example of various correctly uploaded Medical Documents)

Search Results

Service Date	Uploaded By	Document Name	Document Type	Keywords
2/15/2024	[redacted]	Psychiatrist Medication Review	Psychiatrist Evaluation	
2/15/2024	[redacted]	PCP Consult Sheet 2.15.24	Consult Sheet	
3/15/2024	[redacted]	Derm Consul Sheet 3.15.24	Consult Sheet	
2/5/2024	[redacted]	Dental Progress Note 2.5.24	Progress Note Medical	
8/5/2023	[redacted]	Phys Ther Consult Sheet 8.5.23	Consult Sheet	
1/3/2024	[redacted]	Annua Physical 2024	Annual Physical	
2/1/2024	[redacted]	Annual GYN 2024	Annual Gynocological Exam	
3/20/2024	[redacted]	ER Consult Sheet/Visit 3.20.24	Consult Sheet	
8/13/2023	[redacted]	PCP f/u Consult Sheet 8.13.23	Consult Sheet	

Please Note:

Service Date **Matches the Date on the Document Name,** NOT **the Date of the Upload**.

See pg. 10 & 11 on *Document Library: uploading documents*.

LABELING MEDICAL DOCUMENTS IN CARELOGIC (cont.)

Always start the document name with provider type whether it is a consult sheet, progress note or annual, then the date, but be careful because space is limited to 30 characters including the spaces (Please see previews examples).

You can then search the database for annuals, consults or PCP, etc. and it'll pull up everything you had labeled that way.

Reminder: Service Date MUST match the date of the Document, in order to be able to easily locate uploaded documents.

The same goes for records like MAR's, TAR's, controlled med count sheets, BP logs, etc.

- **MAR** February **2024**
- April **TAR 2024**
- **BP log** March **2024**
- **Controlled Med Count** Feb **2024**
- **Blood Sugar Log** June **2024**

Search Results

Service Date	Uploaded By	Document Name	Document Type	Keywords
2/2/2024	[redacted]	MAR February 2024	Medication Administration Record	
4/2/2024	[redacted]	April TAR 2024	Medication Administration Record	
3/1/2024	[redacted]	BP Log March 2024	Medication Administration Record	
2/2/2024	[redacted]	Controlled Med Count Feb 2024	Medication Administration Record	
6/8/2024	[redacted]	Blood Sugar Log June 2024	Medication Administration Record	

Service Dates matches the Date on the Document. **NOT** the Date of the Upload. See pg. 10 & 11 on *Document Library: uploading documents*

(Example of correctly uploaded MAR)

DOCUMENTS NOT LISTED IN CARELOGIC

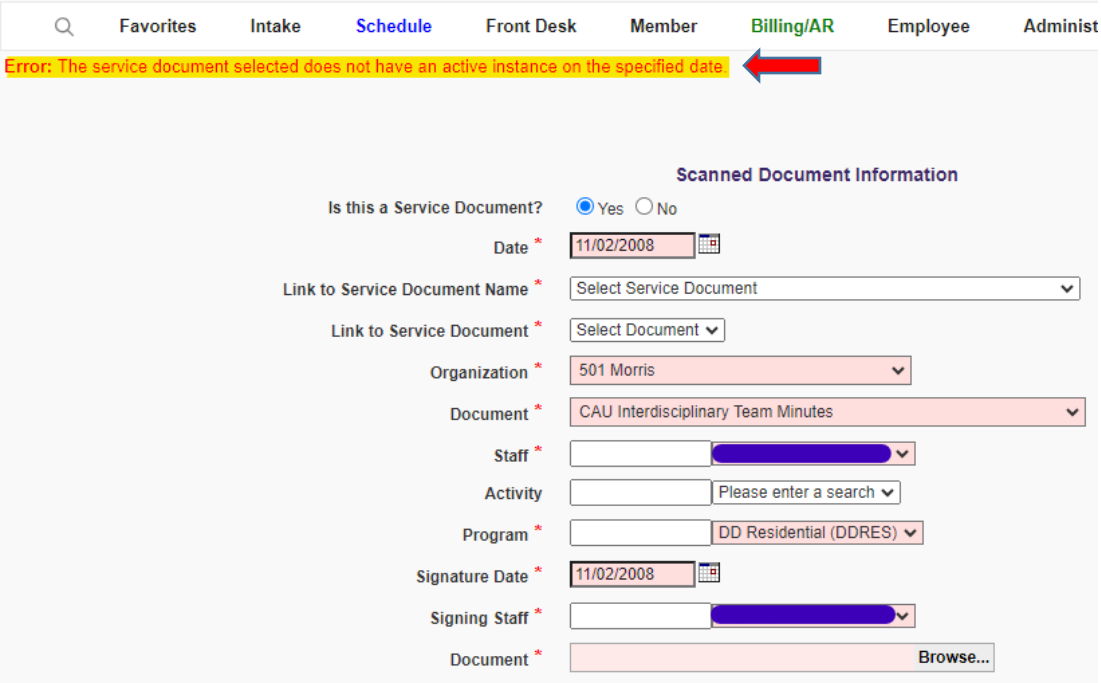
If you have a document that is not listed or you are unsure of the correct name for the document in the **DOCUMENT LIBRARY** **please submit a ticket to https://carelogic.supportsystem.com/ including the following:**

- **Attach a screenshot of the document**
- **Exact name of the document (**EX. **"NJ DIVISION OF DEVELOPMENTAL DISABILITIES ISP MODIFICATION")**

INSTANCE DATE ERROR

If you receive an **Error Message: "THE SERVICE DOCUMENT SELECTED DOES NOT HAVE AN ACTIVE INSTANCE ON THE SPECIFIED DATE" please submit a ticket to https://carelogic.supportsystem.com/ and include the following:**

- **"Name" of the Document you are trying to upload (EX. "IDT Minutes")**
- **"Date" you are using to uploading the document**
- **Attached screenshot of the error message**



SCANNING SUPPORT

If you are having problems with your scanner, please submit an IT Ticket to https://caunj.supportsystem.com/