

Document Storage is to allow users to store external paper documents directly in SanWITS. These documents are tied to a specific client episode in the system, while maintaining compliance. This functionality allows for the uploading of .pdf documents into the client record through the **Intake Screen** in SanWITS. Once uploaded, any SanWITS user that has access to the client record and the proper user roles may view and/or upload specific documents.

Refer to the SanWITS Document Storage-Approved Documents for Attachment 2021.10.09 for acceptable documents, naming convention and Tags for searching.

**INSTRUCTIONS**

**Step 1 – Prepare the document**


1. Scan the specified document on a network printer and save the document to a network folder
2. Name the client document using this naming convention format:

Document name/abbreviation + client last name, first name + date of document xx.xx.xxxx

3. SanWITS Document Storage – Approved Documents for Attachment table is to be used as a reference for approved documents to be uploaded to the client record, naming convention, and Tags to be used

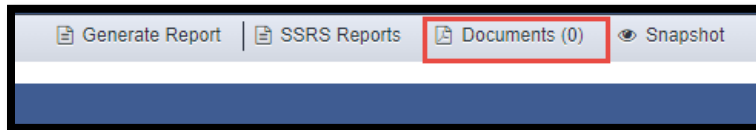
Table can be located on Optum under the SanWITS tab

Example:

 <b>SanWITS Document Storage – Approved Documents for Attachment</b>				
NAME OF DOCUMENT	LOCATION TO UPLOAD DOCUMENT IN SANWITS	SAVED FORMAT: DOCUMENT NAME ABBREVIATIONS + LAST NAME, FIRST NAME + DATE of DOCUMENT xx.xx.xxxx	DESCRIPTION (Optional)	TAG (Required)
Financial Responsibility	Intake Screen	Financial Resp._name__xx.xx.xxxx	SUDURM form # F107 (monthly if client has SOC)	Intake
Client Rights & Complaints	Intake Screen	Client Rights_Complaints_name_xx.xx.xxxx	SUDURM form #F203	Consents
Acknowledgment of DMC Beneficiary Handbook and Directory	Intake Screen	Ack of Benef Handbook_Directory_name_xx.xx.xxxx	SUDURM form #F209	Consents
SUD Admission Checklist	Intake Screen	SUD Admission Checklist_name_xx.xx.xxxx	SUDURM form #F210	Intake

## Step 2 – Upload the Document(s)

1. Navigate to the Intake screen within the client record, once on the screen, select the **Documents (0)** hyperlink located in the upper right corner of the screen

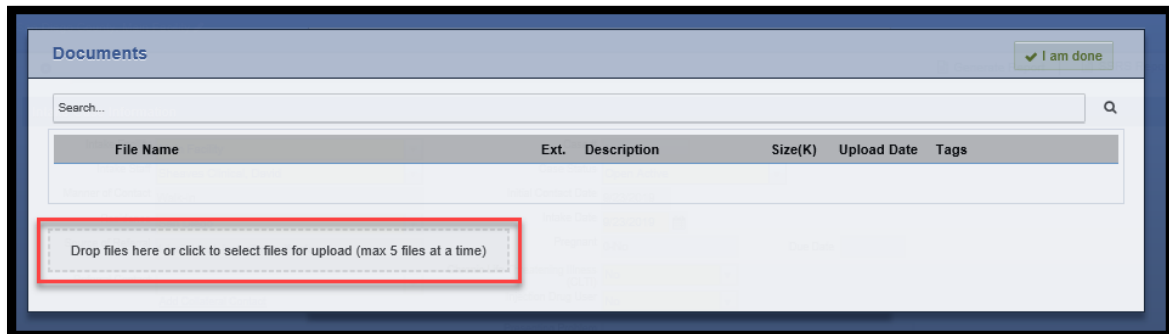


2. After the Documents hyperlink is selected, a Documents Upload Menu will display on the screen  
-There are two options to upload:

Option 1) Drag & drop the document(s) **directly** into the upload box in the lower left-hand corner of the screen (up to five (5) documents can be uploaded at a time) Do not drop the document(s) on any other part of the screen or it will not successfully be entered

**OR**

- Option 2) Click the upload box, select document(s) for upload



3. Once your document has been selected or dragged and dropped, an additional window will be displayed from which the user will see the document(s) and can assign a Tag

Note: Under Tags, enter a Tag according to the SanWITS Document Storage – Approved Documents for Attachment table, this will allow for documents to easily be searched in the future

Optional – a description can be added. Description should be clear and concise to help determine the proper file to open

The screenshot shows the 'Documents' interface. At the top, there is a search bar and a 'I am done' button. Below is a table with columns: File Name, Ext., Description, Size(K), Upload Date, and Tags. One document is listed: 'HealthQuestionnaire\_Last,First\_2021.10.09' with Ext. 'pdf', Description, Size(K) '32', Upload Date '10/9/2021', and Tags 'Assessment'. A green circle highlights the 'Ext.' column and a green checkmark is next to the 'pdf' value. Below the table is a red-bordered box containing the text: 'Drop files here or click to select files for upload (max 5 files at a time)'. Underneath is another table with columns: File Name, Ext., Description, Tags, and Size(K). It lists five documents with their respective tags and 'Remove' links. A red-bordered box highlights the 'Upload' button at the bottom left.

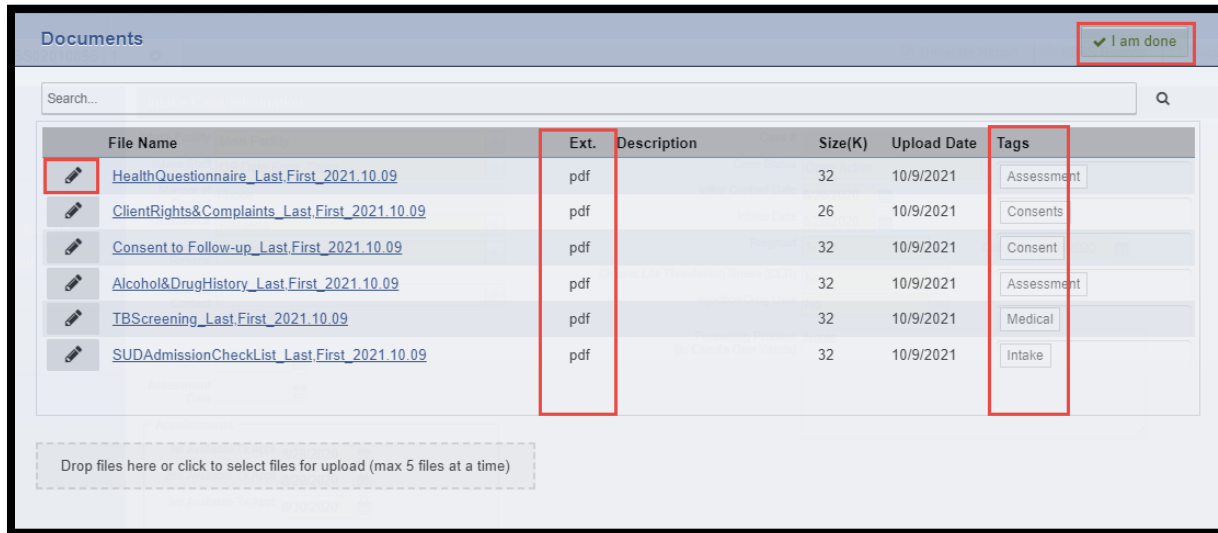
File Name	Ext.	Description	Tags	Size(K)
HealthQuestionnaire_Last,First_2021.10.09	pdf		Assessment	32
ClientRights&Complaints_Last,First_2021	pdf		Consents	25
Consent to Follow-up_Last,First_2021.10.	pdf		Consent	31
Alcohol&DrugHistory_Last,First_2021.10.0	pdf		Assessment	31
TBScreening_Last,First_2021.10.09	pdf		Medical	31
SUDAdmissionCheckList_Last,First_2021	pdf		Intake	31

- Review documents to make sure the correct documents have been uploaded, if at this point a document needs to be removed, Click **Remove** link at the right-hand side of the screen next to the document

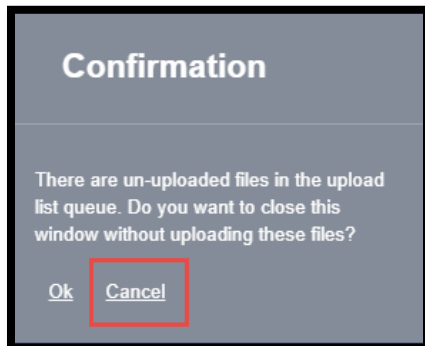
This screenshot shows a single document row in the table. The 'File Name' is 'HealthQuestionnaire\_Last,First\_2021.08.2', 'Ext.' is 'pdf', 'Description' is empty, 'Tags' is 'Enter tags...', 'Size(K)' is '31', and there is a 'Remove' link. A red-bordered box highlights the 'Remove' link. Below the table is a red-bordered box containing the 'Upload' button.

File Name	Ext.	Description	Tags	Size(K)
HealthQuestionnaire_Last,First_2021.08.2	pdf		Enter tags...	31

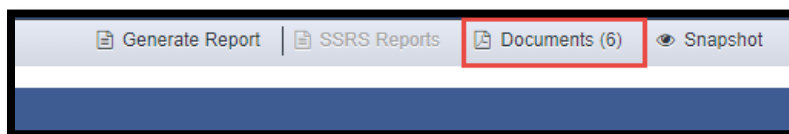
- After review is completed and Tags are assigned, click **Upload** link
- Review again, check to make sure the **Ext** is pdf, and the **Tags** are entered



- Click **I am done** link in the top right-hand corner of the screen. if the **Upload** link was not clicked prior to clicking **I am done** link, a message will appear stating there are un-uploaded files in the list queue, clicking **Cancel** will take you back to the screen to click the **Upload** link, then click **I am done**.



- User will be taken back to the Intake screen where the **Documents** hyperlink will now display number of documents uploaded



### Step 3 – Edit Uploaded Documents

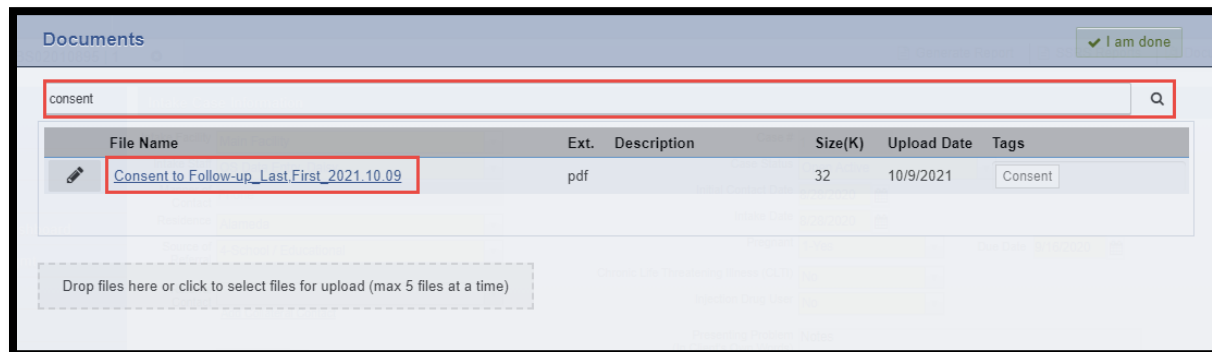
- Edits can be made to the Tag or description by hovering over the pencil icon next to the file name, then click **Edit**, another screen will appear, make changes and/or add description and/or Tag



2. When finished click **Save**

#### Step 4 – View uploaded Documents

1. To view documents, select the **Documents** hyperlink, then search the specific document by typing in name of document, Tag, or date which will bring up the related document on the screen list



2. Click on the File name to open document, If a download window appears, double click **Open file**



3. When finished viewing document, close it out, then choose another document, or if done, click **I am done** link