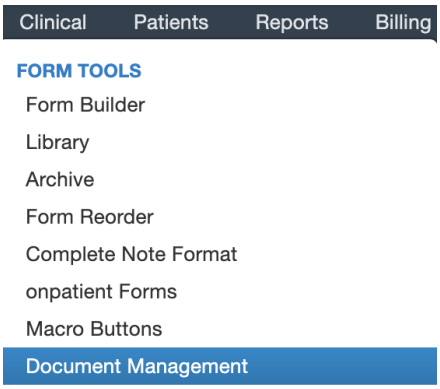
Uploading Multiple Documents for Different Patients

08/27/2024 3:31 pm EDT

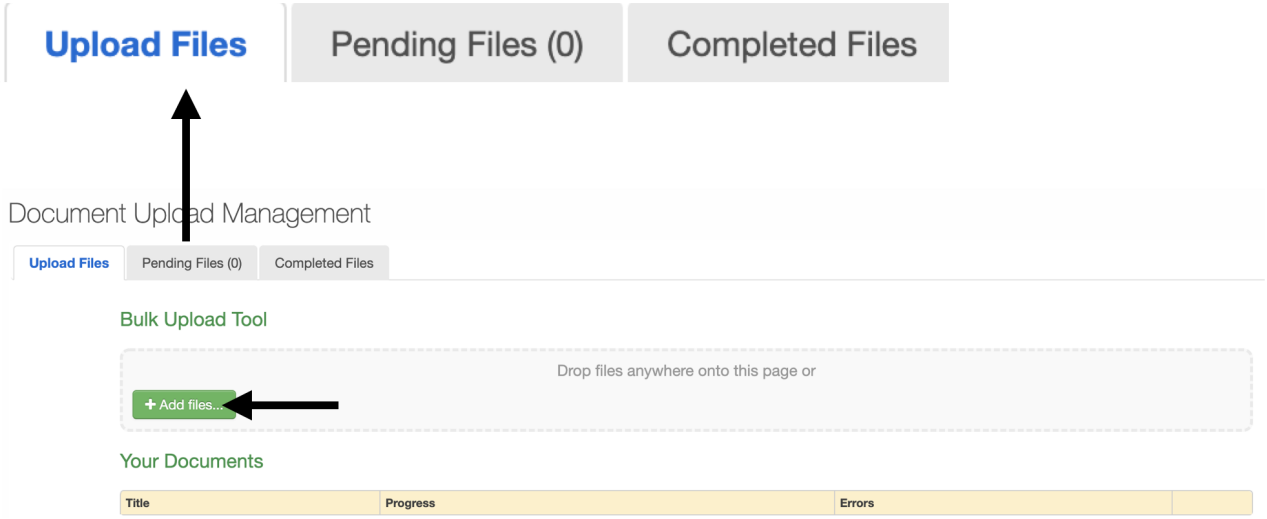
With DrChrono's Document Management tool, you can import several documents for different patients into the software, all in one, easily accessible spot.

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

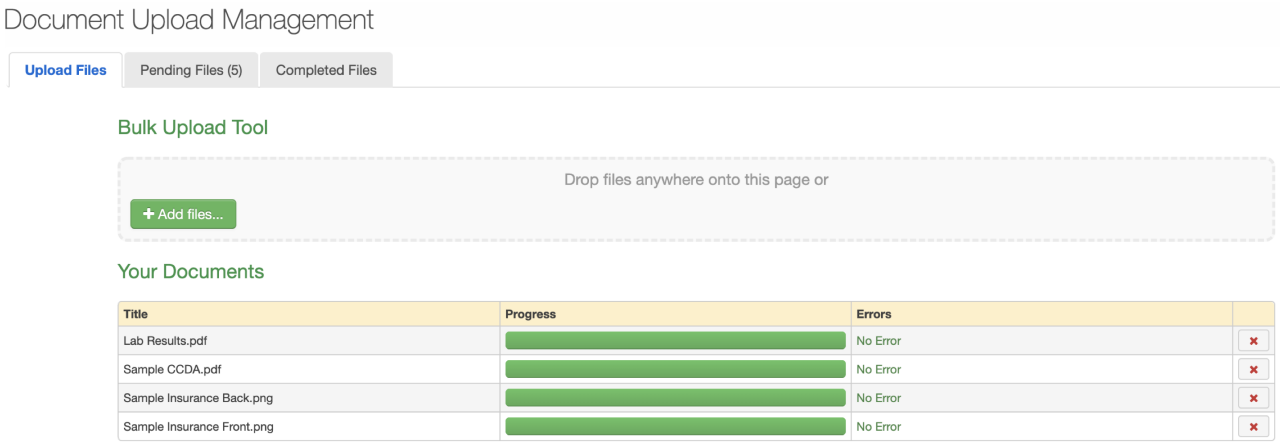


2. On the Document Upload Management screen, there are separate tabs for **Upload Files, Pending Files,** and **Completed Files**. By breaking out the workflow into different tabs, you can quickly view and keep track of where your files are at regarding upload progress and history.

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

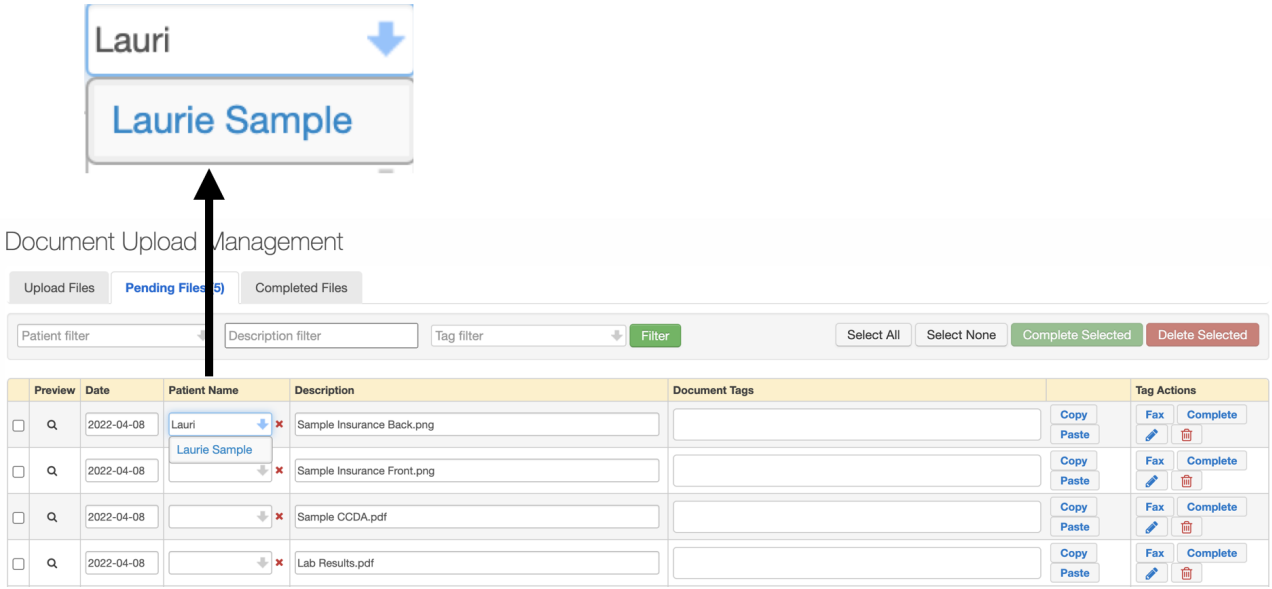


After loading a file, you'll notice it reflects right away if it was successful or not. To delete a file, click on the red x to the right of the document.

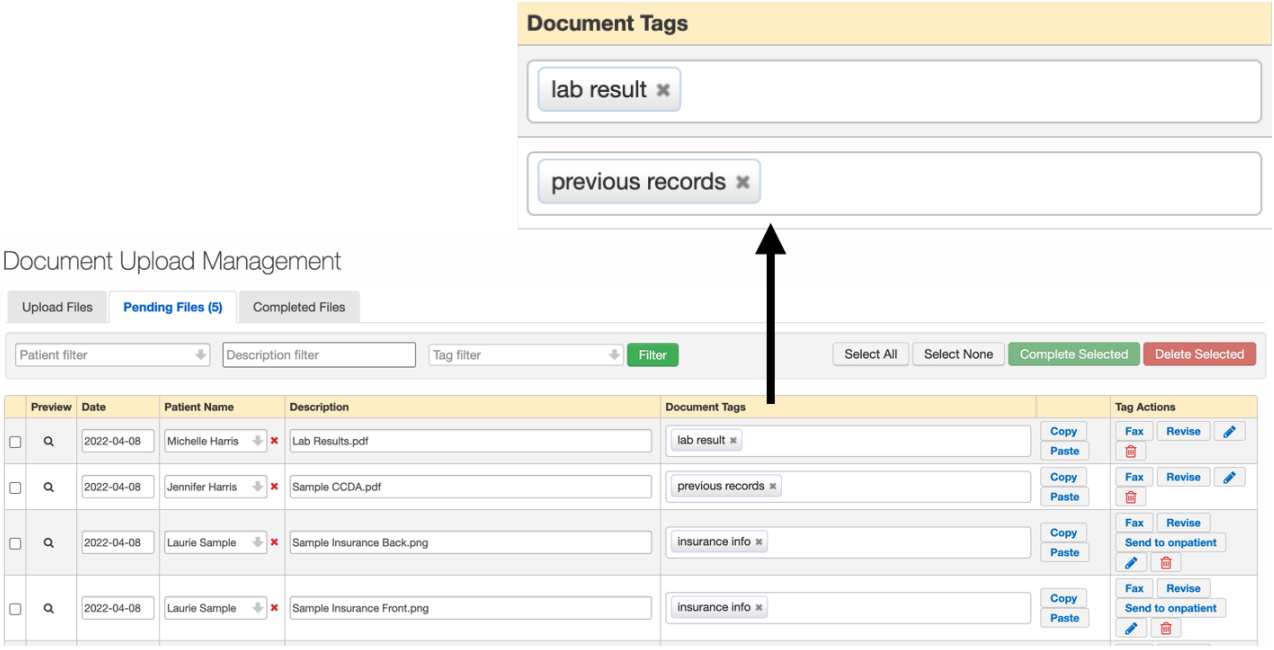


Note: In a single batch, you can upload 100 files or 100MB of files, whichever limit is reached first.

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.



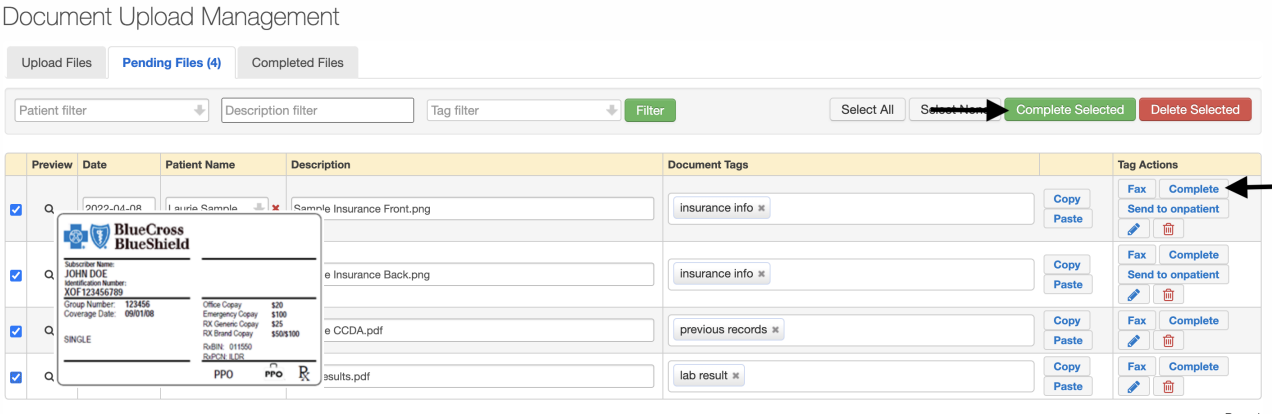
4. Add any tags to the documents.



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

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

) 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.



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.

Document Upload Management

Upload Files | Pending Files (0) | Completed Files

Patient filter | Description filter | Tag filter | Filter | Select All | Select None | Revise Selected | Delete Selected

Preview	Date	Patient Name	Description	Document Tags		Tag Actions
	2022-04-08	Michelle Harris	Lab Results.pdf	lab result	Copy Paste	Fax Revise
	2022-04-08	Jennifer Harris	Sample CCDA.pdf	previous records	Copy Paste	Fax Revise
	2022-04-08	Laurie Sample	Sample Insurance Back.png	insurance info	Copy Paste	Fax Revise Send to onpatient
	2022-04-08	Laurie Sample	Sample Insurance Front.png	insurance info	Copy Paste	Fax Revise Send to onpatient

Clicking the pencil icon(

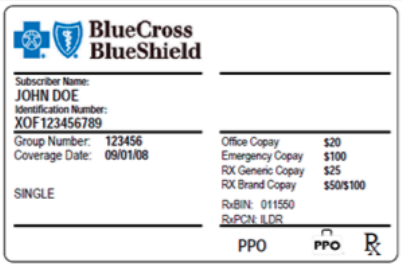
) allows you to update the document information. To save any changes; please click the blue **Update Document** button.

Patient: Laurie Sample

Title: Sample Insurance Front.png

Date: 2022-04-08

Tags: insurance info



Date Updated: 2022-04-08T08:55:42
Date Created: 2022-04-08T08:46:46

Update Document