

Document Management

31/07/2025 3:59 pm BST

Summary

In the Treatment screen, you are able to generate and attach documents to the patient's Treatment History. This can be achieved in multiple ways.

Details

Using Document Management

1. When in the Treatment screen, select the 'Doc Mgmt' button.

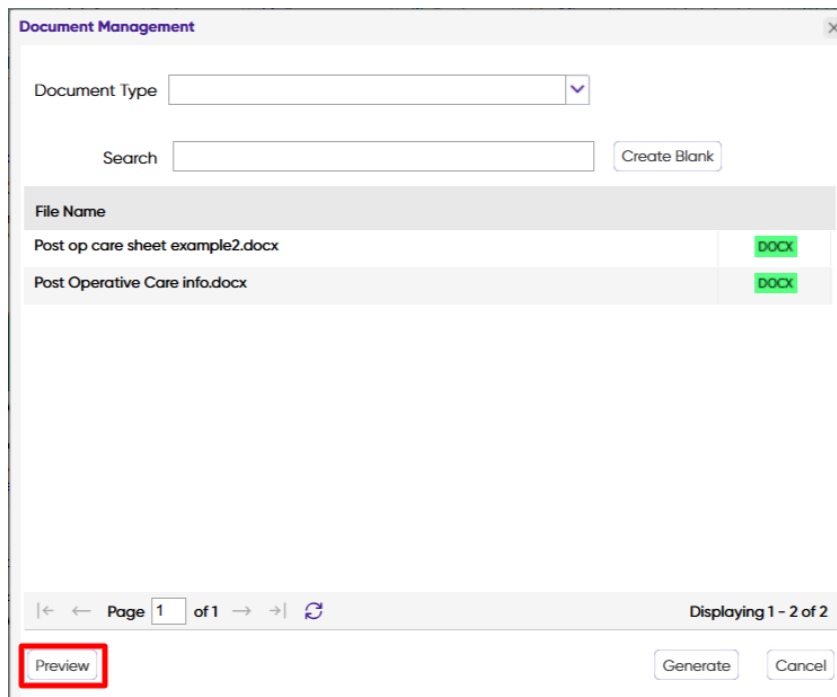
Selecting Document Management will provide you with five options (documented below).

Create New Treatment

This option allows you to search for and generate a Treatment Document from a list of templates.

For information on creating/editing these templates see the [document templates](#) page.

You can also preview the document before printing.



The screenshot shows a 'Document Management' window with a title bar and a close button. It contains a 'Document Type' dropdown menu, a 'Search' text box, and a 'Create Blank' button. Below these is a table with two columns: 'File Name' and a status column. The table lists two documents: 'Post op care sheet example2.docx' and 'Post Operative Care info.docx', both with a green 'DOC' status. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Displaying 1 - 2 of 2'. A red box highlights the 'Preview' button, and other buttons for 'Generate' and 'Cancel' are also visible.

File Name	
Post op care sheet example2.docx	DOC
Post Operative Care info.docx	DOC

Attach File

This wizard allows you to locate and attach a file/files from your local computer to the patient's treatment history.

Note: The following document file types can be uploaded into the system:
txt,doc,msg,png,jpg,jpeg,pdf,docx,mp4,mp3.

The screenshot shows a window titled "Document Management" with a sub-header "Advanced". On the left, under the "Source" section, there are two options: "File Document" (selected) and "Image Library". The main area is titled "Step 2: Document Details" and contains the following fields and controls:

- Document Type:** A dropdown menu currently showing "Select ...".
- Description:** A text input field.
- Source:** Labeled "FROM_FILE".
- File Location:** A large empty text area.
- Attach File:** A button with a paperclip icon.
- Clear Files** and **Delete** buttons.
- Cancel**, **Finish and Close**, and **Close** buttons at the bottom right.

Attach Image

This option allows you to attach a treatment image.

1. Click on Add Image

The screenshot shows a window titled "Treatment Image". The toolbar at the top includes the following icons and labels:

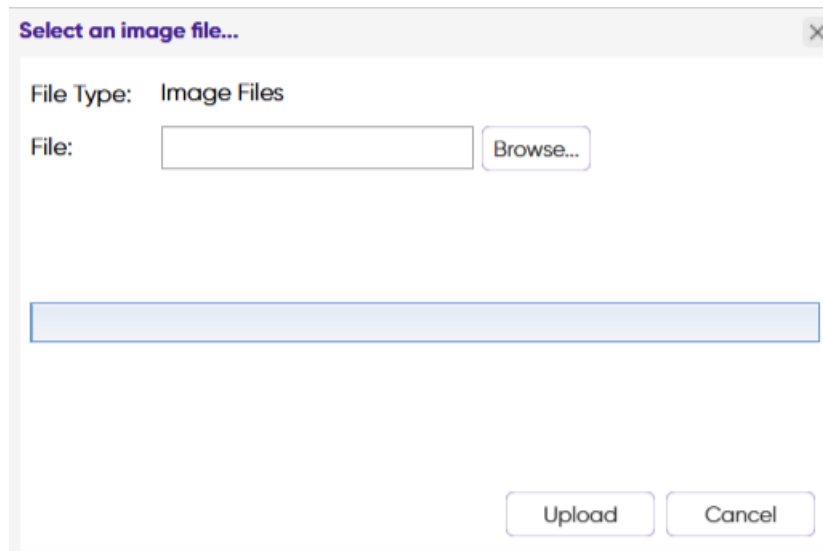
- Add to Draft** (green plus icon)
- Add Image** (image icon, highlighted with a red box)
- Edit Description** (pencil icon)
- Delete Image** (red X icon)
- Refresh** (circular arrow icon)
- Exit** (green plus icon)

The main area displays a list of images with a vertical scrollbar on the left. The visible items are:

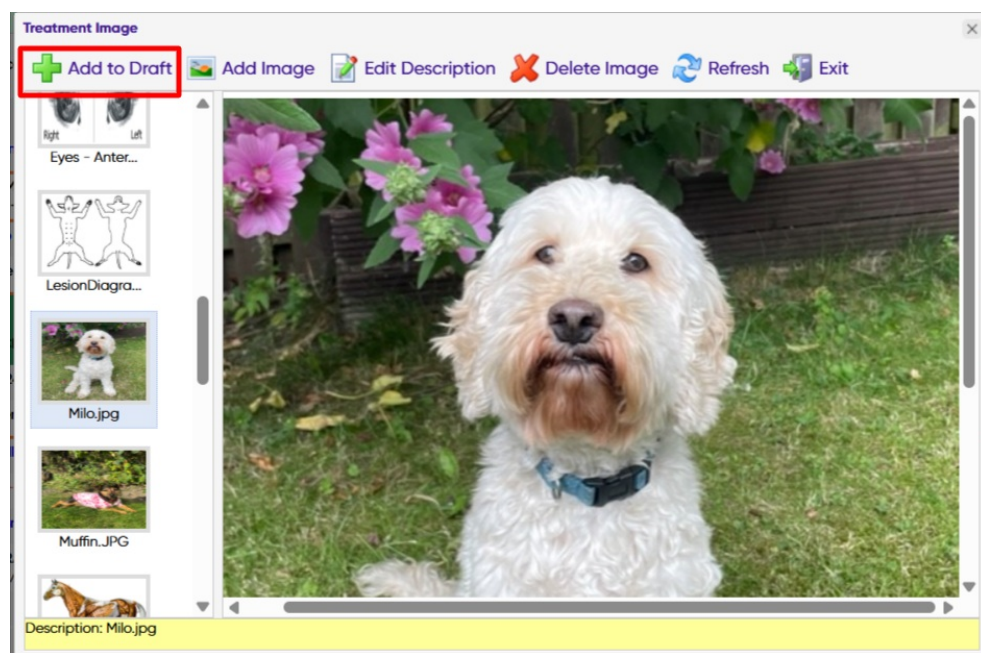
- 140728-WHO-P... (Thumbnail: How to Hand...)
- 140728-WHO-P... (Thumbnail: How to Hand...)
- Auditory Can... (Thumbnail: Diagram of ear anatomy)
- Dental Chart... (Thumbnail: Dental chart grid)

At the bottom, there is a yellow bar labeled "Description".

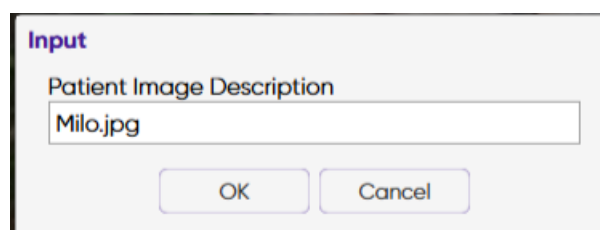
2. Browse for the required image



3. Click on Add to Draft



4. Name the image and click OK



5. The image will be added to Drafts, click on Save

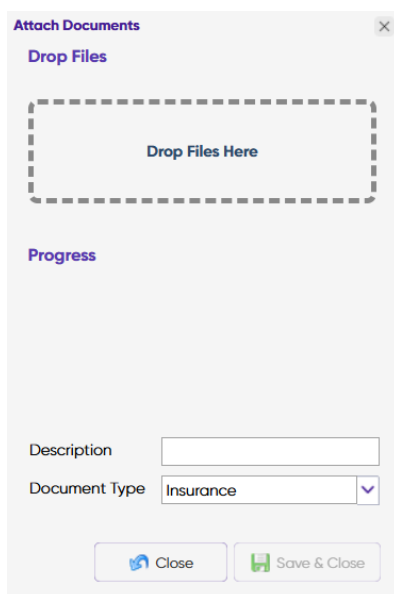
6. The image will now be saved to the Clinical History

	31/07/2025	15:56	Milo.jpg
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Drag & Drop Files

Drag & Drop facilitates the attaching of files to the patient's history.

Locate the document files you wish to attach on your local computer and drag them into the specified 'Drop Files Here' area.



The image shows a dialog box titled "Attach Documents" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Drop Files" with a dashed rectangular box containing the text "Drop Files Here". Below this is a section labeled "Progress" which is currently empty. At the bottom, there are two input fields: "Description" with an empty text box, and "Document Type" with a dropdown menu showing "Insurance". At the very bottom, there are two buttons: "Close" with a blue icon and "Save & Close" with a green icon.

Note: The following document file types can be uploaded into the system:
txt,doc,msg,png,jpg,jpeg,pdf,docx,mp4,mp3.

Once the files have been dropped, fill in the Description and select the Document Type, then click on Save & Close

Saving Documents to history

Once you have attached a document/s using any of the methods above, the document/s will be added to the Add Treatment draft screen. This gives you the opportunity to add any treatments, services or clinical notes.

Treatment Activities Administration

Save Save As Estimate Save to Pre-Invoice Empty Delete Doc Mgmt Consent Manual Barcode Clinical Weight Patient Lab Formulary (F10) Send To

History Pre-Invoice **Add Treatment** Prescriptions Saved Estimates Documents Patients Client Notes Archive Health Care Plan

Item Date 31/07/2025 MWI Pharmacy Prescription Description (search using a minimum of 2 characters) Code General Patient Sam Surgeon Andrew Black (AB) Add

Dispense from Esher

Draft Items

Date	Patient	Description	Clinical Code	Qty	Net	VAT	Total	Surgeon	Site	Grp	Computer	Modified	Modified By	HCP
31/07/2025	Sam	Photos - Milo	General	0	0.00	0.00	0.00	Andrew Black	Esher		Back Re...	31/07/2025	OL	

Once you are happy to proceed, select the 'Save' button to Save to the patient's history.

View Attached Documents

View from Treatment History

Once the Documents have been saved, they will display under the Treatment History tab.

Double click the documents to view. Right-click the document and select 'Edit document' to edit.

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Repeat for today
 Reprint Label & Dispense
 Edit Document
 Download Document

Page 1 of 1

View from Patients History

If documents are attached to a patient's history, the 'Documents' Tab will display in blue. Selecting this tab will show all documents attached to the patient's history.

Treatment

Doc Mgmt View Document Edit Document Download Document Delete Document Weight Send To

History Pre-Invoice Add Treatment Prescriptions Saved Estimates **Documents** Patients Client Notes Archive Health Care Plan

To view a document, double-click on the item to open the file, or select the file and click on View Document.

You can also Select the document and Edit, Download and Delete from this area.