Third Party Document Uploads

Introduction:
Image now allows providers and SCA's to upload documents for a specific IR even if they're not named as the Reporting Party or the Responsible Party on the IR, or are providing coordination services for an individual on it. In the past, to do this, the provider or SCA had to email documents to the appropriate DBHDD staff person for them to attach to the IR.

Important to Note:
If you've been requested to upload documents through this new feature, it's probably because you don't otherwise have access to the IR to be able to upload the documents. Note that when you've been granted permission to upload documents to an IR through this feature, you still won't be able to access, view, or even search for the IR in other places in Image. You'll be able to upload documents to the IR, but that is all.
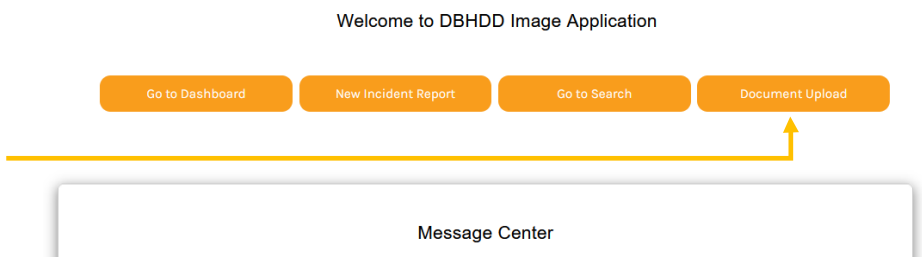
When Can You Do This:
Typically, this will only happen when DBHDD staff have requested that you provide some documentation or other materials related to a specific IR. They will set up specific access in Image so that you can upload the documents.

How To Upload:
Image will send all Supervisor type users at a provider an automated alert when your permission to upload to an IR has been added. A DBHDD staff person will also send a separate message with what documents are being specifically requested. If you don't get an email from a DBHDD staff person with the specific documents being requested, you can ignore the automated email alert.

1) Make sure you have whatever documents you need to upload ready to go (you don't have to upload them all at once, though).

2) Log in to Image.

3) Click Document Upload on the Home page for Image

Welcome to DBHDD Image Application

| Go to Dashboard | New Incident Report | Go to Search | Document Upload |

Message Center

Third Party Document Uploads

4) The Document Upload page will list the IR's that you have access to upload documents to. Look for the IR # you need to upload your documents to (If you don't see it, contact the DBHDD person who requested you to add them)

DOCUMENT UPLOAD

	Provider/Location	IR #	Date Added	# Documents uploaded
✏	PROVIDER A / LOCATION X	210600002	1/16/2024	2
✏	PROVIDER A / LOCATION Y	220100010	1/17/2024	3
✏	PROVIDER A / LOCATION X	230200002	1/17/2024	0

5) On the left hand side of that line, click the Edit button to work with documents for that IR

6) That row will highlight, and below the grid with the list of IR's you can upload to, Image will display another grid with the documents you've uploaded to the IR selected.

DOCUMENT UPLOAD

	Provider/Location	IR #	Date Added	# Documents uploaded
✏	PROVIDER A / LOCATION X	210600002	1/16/2024	2
✏	PROVIDER A / LOCATION Y	220100010	1/17/2024	3
✏	PROVIDER A / LOCATION X	230200002	1/17/2024	0

< Previous 1 ⌄ / 1 Go Next >

[Upload Documents]

[   ] [Refine Search]

File Name	Type	Description	Source	Uploaded Date	Uploaded By	Actions
No Records Available						

7) Click the Upload Documents button.

Document Upload

Uploading/downloading large files (for example, single videos over 30 minutes in length) can adversely impact performance on slow network/internet connections. To reduce performance impacts due to slow connections, split video files into separate 30 minute video files for upload.

Please click Browse to upload the document.

[Browse…]

C:\fakepath\Medical Record Attachment.pdf

Document Name

Medical Record Attachment.pdf

*Document Type

Medical Records   ⌄

Document Description

Please specify

8) The Document Upload popup appears. Select the file you're uploading and fill in the additional information. This Document Upload popup works just like the Document Upload in other places in Image.

9) Click the Save button to upload that document

[Cancel] [Save]

Third Party Document Uploads

DOCUMENT UPLOAD

	Provider/Location	IR #	Date Added	# Documents uploaded
☑	PROVIDER A / LOCATION X	210600002	1/16/2024	2
☑	PROVIDER A / LOCATION Y	220100010	1/17/2024	3
☑	**PROVIDER A / LOCATION X**	**230200002**	**1/17/2024**	**1**

< Previous 1 / 1 Go Next >

Upload Documents

[Refine Search]

File Name	Type	Description	Source	Uploaded Date	Uploaded By	Actions
Medical Record Attachment.pdf	Medical Records		DU	1/18/2024	Super CProvYax(YAX'S, INC)	View Edit Delete

< Previous 1 / 1 Go Next >

10) Your document will upload and be listed in the uploaded documents grid for the IR you uploaded to. Image also requires that uploaded files have unique filenames, so if you get an error message about this, just change the filename as needed to make it unique. (You can add a _1, _2, or _3 on the end of the filename, for example.)

11) Click the Upload Document button for each additional document you need to upload and repeat the process to upload them.

12) The documents grid for the selected IR works like the documents grid elsewhere in Image. You can **view** the document you've uploaded, **edit** information about the document, or even **delete** it if you uploaded that file in error.

13) Once you've uploaded the files as requested, please contact the requestor to let them know that all requested files have been uploaded.

DOCUMENT UPLOAD

	Provider/Location	IR #	Date Added	# Documents uploaded
☑	PROVIDER A / LOCATION X	210600002	1/16/2024	2
☑	PROVIDER A / LOCATION Y	220100010	1/17/2024	3
☑	**PROVIDER A / LOCATION X**	**230200002**	**1/17/2024**	**1**

< Previous 1 / 1 Go Next >

Upload Documents

[Refine Search]

File Name	Type	Description	Source	Uploaded Date	Uploaded By	Actions
Medical Record Attachment.pdf	Medical Records		DU	1/18/2024	Super CProvYax(YAX'S, INC)	View Edit Delete

< Previous 1 / 1 Go Next >