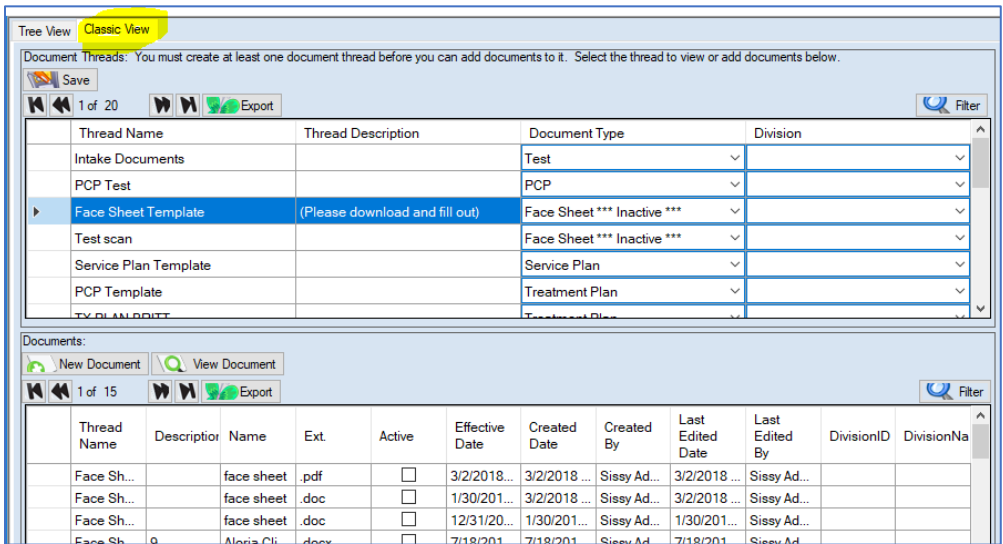
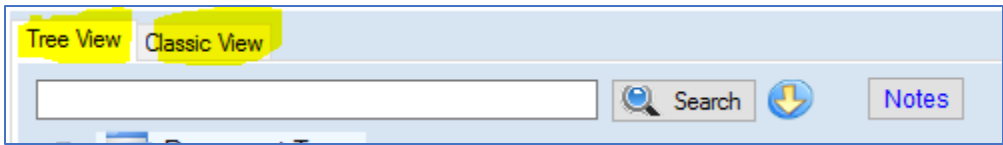


Document Management

Summary:

The document window in PIMSY performs much like MS Windows file management. However, you can still use the "Classic View" for adding and managing documents. Click on either **Tree View** or **Classic View**.

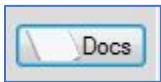


See below for **Classic View** instructions.

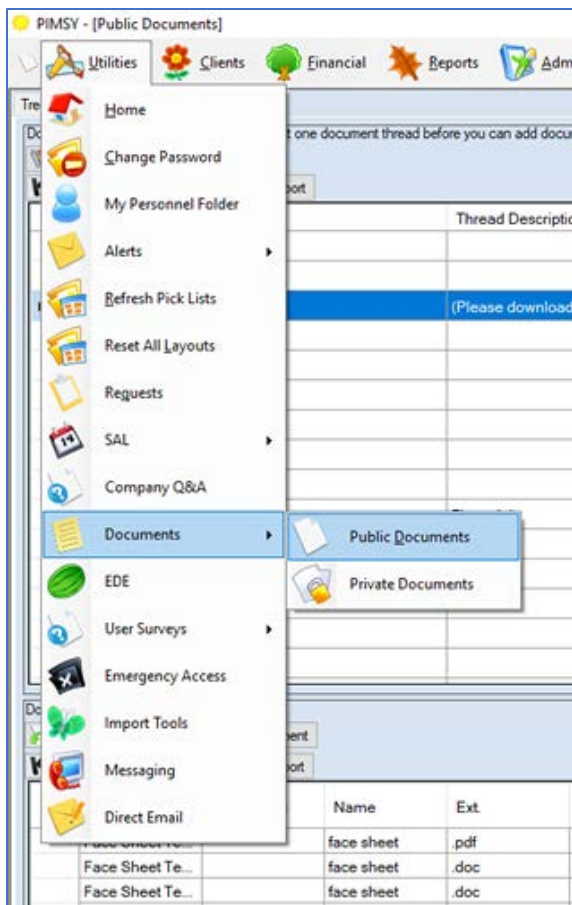
In the **Tree** or **Classic** views, folders can be created and files added to manage all documents pertaining to a specific section of PIMSY.

When a document is added to a **Client Group**, it will be displayed in each client's document tree.

Access the new Document window wherever documents are managed and stored in PIMSY. One example is the **Documents** tab on the **Client Details** page. In other areas, click on the **Docs** button.



You can also access **Public** and **Private** documents under the **Utilities** menu.



Instructions:

Go to any area in PIMSY where documents are uploaded and managed.

To **create the first folder**, right click on **Document Type**. The Document Types must first be created in Pick Lists.

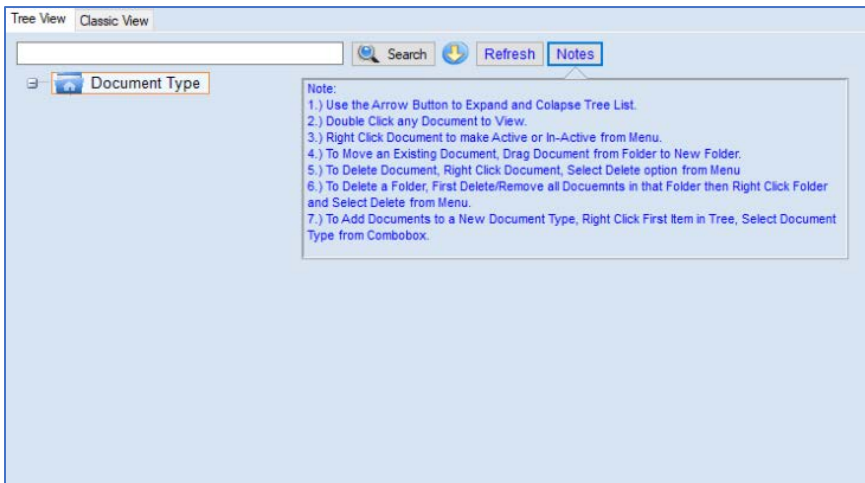
DOCUMENT TYPE PICK LIST MANAGEMENT

To add or remove a **Document Type**, go to **Pick List Management** and select the **Document Types** tab (under Other). To remove a document type, select an existing line and click **Delete**. To add a new **Document Type**, select the bottom empty white row and add the Name, Description (optional) and select the appropriate additional functions, such as **Add to New Clients**. When you check **Add to New Clients**, the document type will be automatically added to a new client's chart. If appropriate, be sure the Document Type is **Active**.

Billing	43	Digital Signature
Other	48	Group Documents
Document Types	44	Insurance Card
Request Types	45	Police Record
Note Types	52	Referral Documents
Delivery Types	42	Release of Info
Location Types		

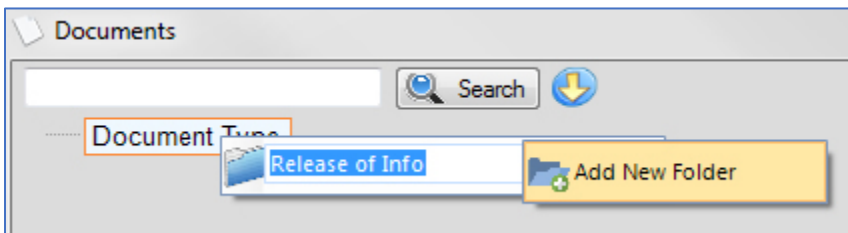
TREE VIEW

The first time the **Document** window appears, there won't be any folders or files.



If needed, click on the **Notes** tab at the top for quick instructions.

When you right-click over **Document Type**, a window pops up where you can select the **Document Type** and **Add a New Folder**.

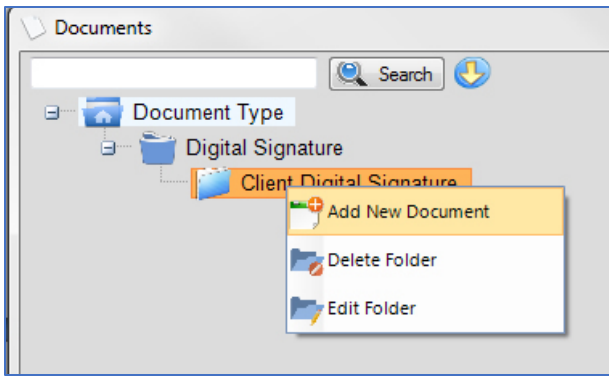


When you click on **Add New Folder**, a new window appears where you add the folder name, optional description and Division. This folder will appear under **Document Type**

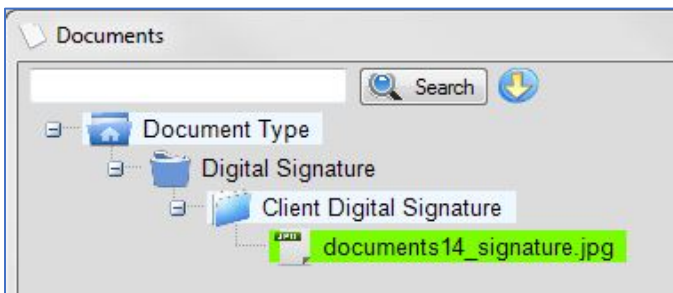
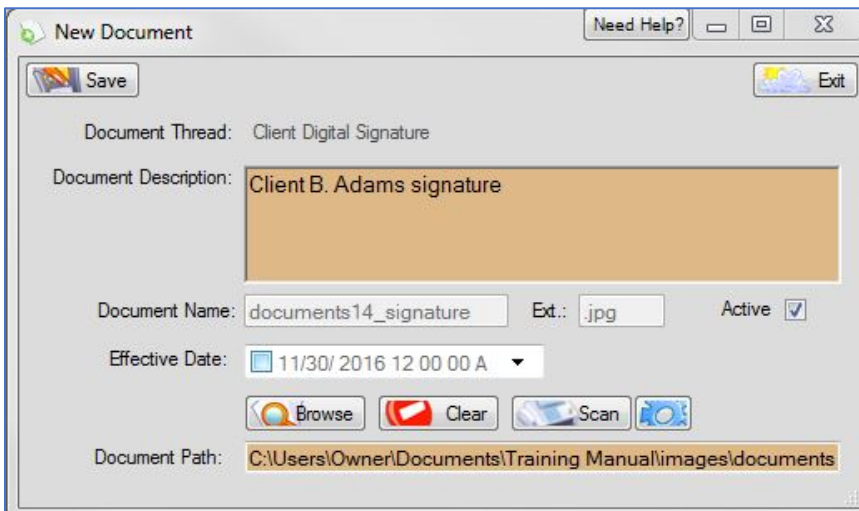
A screenshot of the 'Add New Folder' dialog box. It has a 'Save' button and a 'Need Help?' checkbox. Below is a table with three columns: 'Folder Name', 'Folder Description', and 'Division'. The 'Division' column has a dropdown menu. Below the table is a large grey text area.

	Folder Name	Folder Description	Division
▶▶			

To **add a document**, right click on any folder and select **Add New Document**.

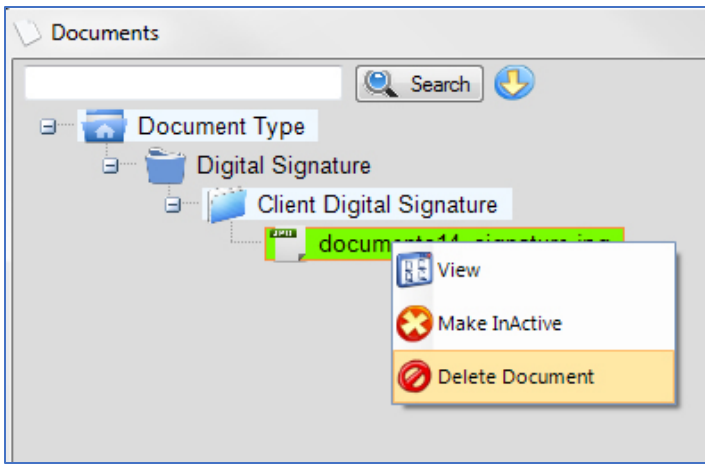


The New Document window opens for you to add a **Document Description** and **Browse** for the file. Make **Active** if appropriate. **Save**. The new document will appear under the designated folder.

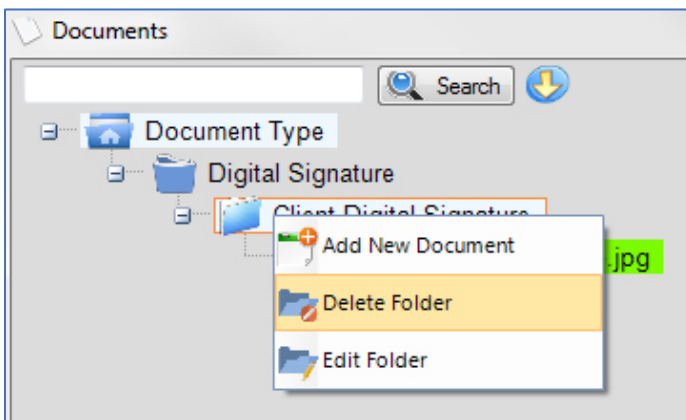


To add new main folders, go to the **Document Type** dropdown and select a different type or right click on an existing document type to add a new subfolder. Follow the instructions above for adding a folder and a file.

To **delete a file**, right click over the filename and select **Delete Document**. You can also **View** the file and/or **Make InActive**.



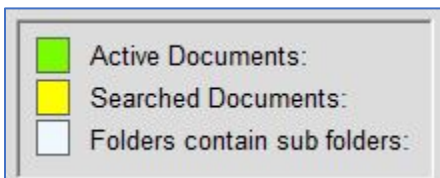
To **delete a folder**, remove all files in that folder, then right click over the folder and select **Delete Folder**.



To **move a document**, drag and drop it into a different folder.

Note -To drag a document from one folder to another -> Just drag and drop document:

The color legend indicates the current source/state of a document.



CLASSIC VIEW

The screenshot displays the 'Classic View' interface. At the top, a 'Tree View' tab is active, showing a list of 'Document Threads'. Below this, a 'Documents' section is visible, showing a list of documents. The 'Document Threads' table has columns: Thread Name, Thread Description, Document Type, and Division. The 'Documents' table has columns: Thread Name, Description, Name, Ext., Active, Effective Date, Created Date, Created By, Last Edited Date, Last Edited By, DivisionID, and DivisionName.

Thread Name	Thread Description	Document Type	Division
Intake Documents		Test	
PCP Test		PCP	
Face Sheet Template	(Please download and fill out)	Face Sheet *** Inactive ***	
Test scan		Face Sheet *** Inactive ***	
Service Plan Template		Service Plan	
PCP Template		Treatment Plan	
TV PLAN PRINT		Treatment Plan	

Thread Name	Description	Name	Ext.	Active	Effective Date	Created Date	Created By	Last Edited Date	Last Edited By	DivisionID	DivisionName
Face Sh...		face sheet	.pdf	<input type="checkbox"/>	3/2/2018...	3/2/2018 ...	Sissy Ad...	3/2/2018 ...	Sissy Ad...		
Face Sh...		face sheet	.doc	<input type="checkbox"/>	1/30/201...	3/2/2018 ...	Sissy Ad...	3/2/2018 ...	Sissy Ad...		
Face Sh...		face sheet	.doc	<input type="checkbox"/>	12/31/20...	1/30/201...	Sissy Ad...	1/30/201...	Sissy Ad...		
Face Sh...		Maria Cli...	.docx	<input type="checkbox"/>	7/18/201...	7/18/201...	Sissy Ad...	7/18/201...	Sissy Ad...		

Columns:

UPPER SECTION

Thread Name – a name for the document “folder.”

Thread Description – optional description of document

Document Type – a “type” of document selected from a drop-down box

LOWER SECTION

Buttons:

New Document – add a new document

View Document – view an existing document

Columns:

Thread Name – name that was added in the top section

Description – optional description for document

Name – name of the file uploaded

Ext. – file extension for the document, such as .doc, .jpg, .xls, etc.

Active – document is active in PIMSY

Effective Date – date when the document should be Active in the system

Created Date – first date document was added

Created By – person who first added the document

Last Edited Date – last date document was edited

Last Edited By – last person who edited the document

Instructions:

To upload a new document, start on the last line in the top section, the one with the *. Enter **Thread Name**, optional **Thread Description** and then select the **Document Type** from the drop-down menu. (see *Pick List instructions below for adding/removing document types*)

Select the new line and click on **New Document**.

Thread Name	Thread Description	Document Type
Board Meetings		Board Meeting Minutes
Incorporation Articles		Articles of Incorporation
3-2011		Board Meeting Minutes
Statement Image		Statement Footer Image
receipt template		Receipt Full Footer Image

Thread Name	Description	Name	Ext.	Active	Effective Date	Created Date	Created By	Last Edited Date	Last Edited By
Board Me...	Board June	confagree	.pdf	<input checked="" type="checkbox"/>	3/12/20...	3/12/201...	System A...	3/12/201...	System A...
Board Me...	Sept 2008	ACBV Se...	.pdf	<input type="checkbox"/>	3/12/20...	3/12/201...	System A...	3/12/201...	System A...
Board Me...	Aug 2008	August 2...	.pdf	<input type="checkbox"/>	3/12/20...	3/12/201...	System A...	3/12/201...	System A...

A box will open where you can upload your document. Give the document a description and **Browse** for the file on your computer. The **Document Name** will fill in automatically with the filename you attach. Click **Save** and **Exit**.

Document Thread: Board Meetings

Document Description:

Document Name: Ext.: Active ☐

Document Path:

To *remove a document*, double-click the row in the bottom section you want to remove and click **Delete** in the popup window. Click **Yes** and **Yes** to delete the file.

Document Thread: Board Meetings

Document Name: brochure11JUN13 Ext.: pdf Active ☐

Document Description:

Effective Date: Friday, January 16, 2015 ☐

Created Date: 1/16/2015 12:16:15 PM Created By: System Administrator

Last Edited Date: 1/16/2015 12:16:00 PM Last Edited By: System Administrator

If you cannot find what you need in this article, please contact Support (email) or call 877.334.8512 ext. 3.

