Document Manager Guide

Overview

Document Manager supports the uploading and sharing of many kinds of documents between the health plan and users. This feature supports advanced search capability, categorization and archival of documents, linkage of documents to claims and authorizations and comments between users.

Using the Document Manager

Document Manager is available from the **Office Management** dropdown menu.

Figure 1: Office Management Menu

Document Manager Summary Screen

- View current documents uploaded by the health plan within Document Manager.
- Available documents can include:
    - Care Gap Report
    - Line of Business Specific Member Roster
    - HEDIS Site Report
    - Stars Report
    - Medication Adherence Report
    - Inpatient (IP) report
    - Emergency Room (ER) Report

Search Documents

There are multiple options available to search within document manager.

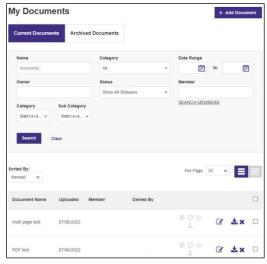**Note**: Keyword searches are the preferred way to locate documents.

- Search (keyword and content)
- Category
- Sub-Category
- Document Name
- Date Range
- Document Owner
- Member
- Status
    - Show All Statuses
    - Downloaded
    - Received
    - Uploaded

Figure 2: My Documents

View Documents

The Document Summary screen accommodates two views: Snapshot view and Table view.
From either view, the Document Summary screen defaults to the user's Current Documents list. The table view is the default view and users can switch between views using the icons on the right of the screen above the user's current documents.

Figure 3: Document Views

The Snapshot view is a more detailed view of each document entry with written descriptions of each action button.

The Table view is a condensed view of each document entry with action buttons only showing as icons.

In each view, users can view/edit, download and archive documents.