

Document Upload Feature of Client Database (CDB) – Guidance #66 **June 2013**

Introduction

The purpose of the Document Upload feature is to attach files in PDF format to the CDB record of a specific client. Examples of files to upload include the colonoscopy and/or pathology reports. Document Upload is an **optional** feature in the CDB. Documents are uploaded and attached to a specific cycle for the client.

Document Upload allows the local program user to:

- Store a copy of the provider or lab reports in the CDB instead of typing reports verbatim into certain fields (for example ‘Comments on Findings’ or ‘Pathology Report’) in the CDB.
- Make clinical reports and other information available to DHMH for review as needed/requested.
- Link a specific document to a client’s cycle using the Document Upload page (see Instructions below).

Instructions

Scanning and Saving

1. Scan the document you wish to upload **in PDF format**.

Note: You will need to know what type of scanning device you have as scanners may automatically save documents in PDF or JPG format; you need to save in PDF for the Document Upload feature.

2. Save the file to a **secure/confidential** location on your computer **using the following naming convention for the file name:**

CDB ID-cycle number description/type of report date of report

Example: 47022-2 path report 04-29-2013.pdf

Uploading the Document

From the ‘Go To’ menu at the top of each page in each cycle in the CDB, select **Cycle Documents** (see screen shot below) and click on the ‘Go’ button.

This will take you to the Cycle Documents page in CDB.

Colorectal Cancer [CRC] Screening Page 1

Required Fields [red and bold]
 Disable optional elements Help ?

CDB ID: Cycle #: Go To:

Client Name: Sixtytwo, Janet Sarah CDB ID: 47700

Program Use Only

Jurisdiction: Baltimore City-UMMS Client Identification CDB ID [sy] Lc 7700

Staff Involvement:
 Role Name
 -- Staff Involvement --

Cycle Start [Interview] Date [mm/dd/yyyy]:

Patient Information

Last Name: Sixtytwo Suffix [Jr.,etc]: First Name: Janet
 Date of Birth [mm/dd/yyyy]: 06/02/1952 Asset Number: 59 CDM [last 4 digits]: 0851

Colorectal (CRC)

- Colorectal (CRC)
-
- Screening Pg 1
- Screening Pg 2
- Screening Pg 3
- Screening Pg 4
- Post Screening Pg 1
- Post Screening Pg 2
- Cycle Closure
-
- Nurses Notes
- Additional Procedures
- Program Defined Variables
- Required Fields Validation
- Cycle Documents**
- Letter/Merge File
- Cycle Report
- Core Page 1

From the Documents screen, click **Upload**. This opens a new screen.

Documents for Colorectal [CRC] Cancer Screening

Required Fields [red and bold] Help ?

CDB ID: Cycle #: Go To: Colorectal (CRC)

Client Name: Sixtytwo, Janet Sarah CDB ID: 47700 Cycle #: 1 Sponsor: CRF

Documents for CRC Cycle

Document Name	Actions
	<input type="button" value="Upload"/> <input type="button" value="Cancel"/>

Click on **Browse** to select the Document. This will bring up a new window with a file directory.

Documents for Colorectal [CRC] Cancer Screening

Required Fields [red and bold] Help ?

CDB ID: Cycle #: Go To: Colorectal (CRC)

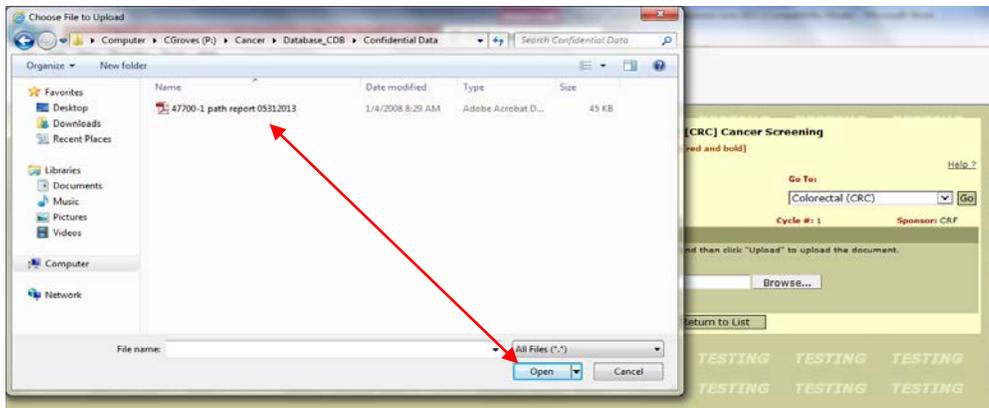
Client Name: Sixtytwo, Janet Sarah CDB ID: 47700 Cycle #: 1 Sponsor: CRF

Upload Document

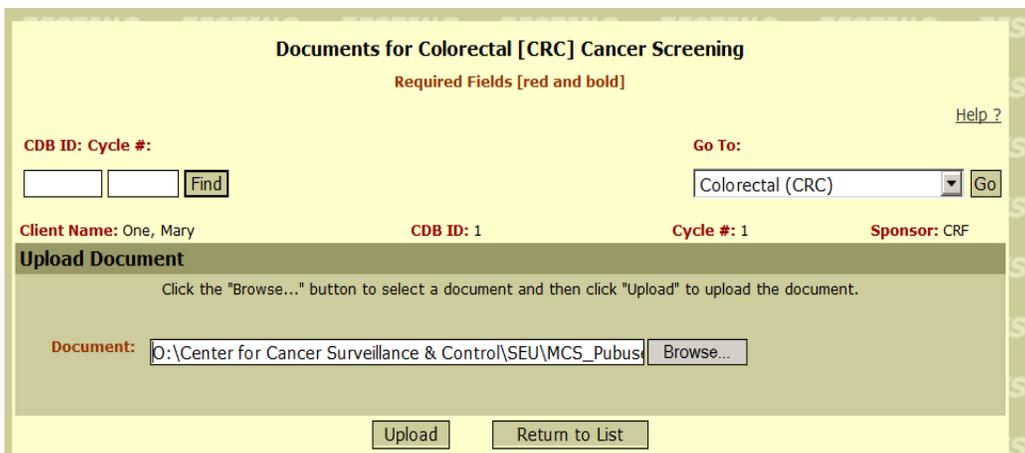
Click the "Browse..." button to select a document and then click "Upload" to upload the document.

Document:

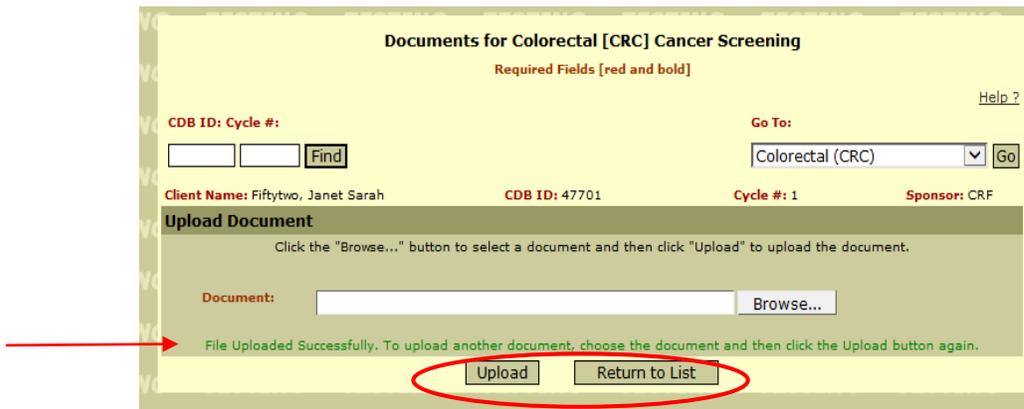
Locate the .pdf file; double-click or click Open (this is similar to attaching a file in email).



Once the PDF document is identified in the 'Browse' window, click on **Upload**.



A message appears if successful: File Uploaded Successfully. Click **Upload** to add more documents, or click **Return to List** to see entry. Or use the 'Go To:' box to return to other sections of the client record.



Viewing Documents

From the 'Go To' menu in the cycle, select the **Cycle Documents** option. This will open the Documents page for you to view the documents uploaded to this cycle. The 'Cancel' button takes you back to the Client Information Page. To stay within the cycle, use the 'Go To' box.

Documents for Colorectal [CRC] Cancer Screening
Required Fields [red and bold]

CDB ID: Cycle #: Go To: Colorectal (CRC) [Help ?](#)

Client Name: Sixtytwo, Janet Sarah CDB ID: 47700 Cycle #: 1 Sponsor: CRF

Document Name	Actions
47700-1 path report 05312013.pdf	View Delete

Changing File Names

To change a file name once it is uploaded, you will need to go to the source document that you saved on your computer and change the name, delete the uploaded document, and upload the document with the new name. You may not rename the file you have already uploaded to the CDB directly in the CDB.

Retaining Files

The scanned document, once uploaded, will be saved in the CDB at the cycle level. After scanning a document, you may wish to delete the electronic version saved to your computer and retain only the original hard copy in the client's record to minimize the number of confidential files on your computer or server. Alternatively, you may wish to retain only the electronic version if your local program has moved to electronic records. Your local program should make the decision as to which document(s) to keep in your files and under what security protections.