

Southwest Michigan

BEHAVIORAL HEALTH

Primer- Advanced Uploads #14

Beginning March 2018 SWMBH will deploy enhancements to application's scanning functionality, returning the ability of providers to view scanned records from the client file.

Uploading Scanned Documents

1. Upon logging into the application, navigate to the My Office: Scanning banner;

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MyOffice Type OR Select

Checks
Claims
Dashboard
PA Checks
PA Clients
CM Authorizations
Messages
Alerts
My Preferences
Scanning
My Reports

Unsaved Changes

Dashboard

EHR Widgets

Care Management New Alerts/Messages


From	Received	Member	Subject
	12/29/2017		Adjudication Job: De...
	12/29/2017		Adjudication Job: De...
	12/29/2017		Adjudication Job: De...
	12/29/2017		Adjudication Job: De...

Provider

All Providers

Provider Authorizations

Requested	Recently Denied	Pended	Needed
319	196	54	54233

2. From the Scanning screen users can view previous uploads or select the Upload New Images  icon from the toolbar. From the Upload Detail, users will select their desired upload and complete the necessary fields;

Questions or Concerns?

Contact providersupport@swmbh.org for more information!

- Users should select Client (Events) from destination dropdown in all cases.
 - Record Type: Select appropriate record type from dropdown.
 - Description: Users are able, but not required, to enter a brief custom description of their record in this field.
 - Provider: Users are able to search and select appropriate Provider.
 - Insurer: Users are able to select the appropriate Insurer from this dropdown.
3. After completing all necessary fields, select **Save** to deliver the upload to the Client Record.

Viewing Scanned Documents in the Client Record

1. Uploads are now available for viewing via the CM Events banner in the applicable Client Record;

Questions or Concerns?
 Contact providersupport@swmbh.org for more information!

- Users can view the scanned record detail by clicking on the Event's hyperlink;

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MyOffice test, test (860006) X Type OR Select

Claims
Client Information(C)
Client Plans And Time Span
CM Client Authorizations
CM Events

CM Events (1)

All Events All Statuses All UM Staff Apply Filter
All Insurers All Providers

Event Id	Event	Date	Status	Staff	Provider
867154	2 Year Justification of Continuatio...	03/12/2018 10:58 AM	Completed	Test, Jake	Summit Pointe

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MyOffice test, test (860006) X Type OR Select

Claims
Client Information(C)
Client Plans And Time Span
CM Client Authorizations
CM Events

2 Year Justification of Continuation of Care

Go To Complete
View Share Status Signed Effective 03/12/2018 Author Test, Jake More Detail

Document

1 / 1 139%

Client Viewing

Unsaved Changes

Questions or Concerns?
Contact providersupport@swmbh.org for more information!