



MemberCONNECT Document Manager Guide

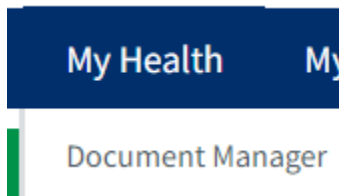
Introduction

Document Manager is an app in MemberCONNECT that enables Partners to share documents with members within the secured portal. This is a step-by-step instructional guide to using Document Manager.

To login, open your Internet Browser (Chrome is preferred) and navigate to <https://pbhm.healthtrioconnect.com>.

Instructions

1. Use the navigation link at the top. Select “My Health.” Then click on “Document Manager.” (Office Management>Document Manager.)



2. Once you are in Document Manager, you can do several things:
 - Add a new document or open a new/existing document
 - Sort existing documents
 - Document name
 - Document oldest/newest on top
 - Mailbox name
 - Search for an existing document
 - Archive an existing document
 - View archived documents
 - Permanently delete documents

As you scroll down, you will see a list of current files with documents that have been uploaded/shared. If the list is empty, there are no shared documents or they all have been moved to the “Archived Documents” tab. Each file contains details such as the date and time it was uploaded, the reference member name if applicable, and the owner of the document. The list is sorted by “Newest” as the default. You may also sort documents to view by Oldest, Document Name or Owner Name (the sort selection will be refreshed to the default each time you enter Document Manager). To the right you will see an option for two different views: table view and snapshot view along with the page number of the list you are currently viewing.

To the right of each existing document are two sets of icons; status icons and action icons. You may determine the file status or options for file actions by hovering over that icon. The file status shows if there are comments to the file, if it was shared or linked to another file, or if it was downloaded. The possible actions are “edit”

(depending on who owns that document), “download”, and “archive”. Lastly, there is a blank checkbox to the right. You may click in the checkbox to select it or select multiple files in the list, scroll to the bottom of the screen and select “permanently delete”. Please refer to your organization’s file retention policy before deleting files.

A. Retrieving an Existing File:

After opening Document Manager, under the search function shows the list of documents that have been just uploaded or uploaded and shared within your organization and Partners. You will want to be selective in downloading only documents that are appropriate for your viewing according to your job duties.

You may sort the documents Newest/Oldest uploaded date and time (time is Mountain time), Document Name, or Owner Name. Then view/download as necessary.

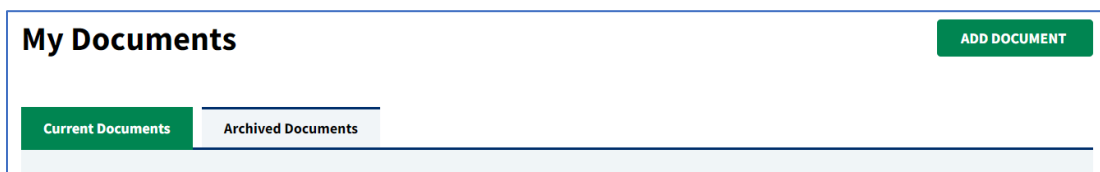
1. Click on the document name and view the details of the file such as the file name, a description if entered, who uploaded it, the file size and date/time it was uploaded. The “Sharing” box will show if and with whom the file was shared. You have not actually accessed the actual file at this point, you are just viewing the details. You can decide if this file is for you or for someone else to download, or you can simply go back to Document Manager (click the back arrow), where you can select another document if desired.
2. If you wish to download the document, click the download icon (down arrow) from the list, or click the file name to open the details and click on the “DOCUMENT TOOLS” button on the right. Here, depending on who owns that document, you also may see the options to edit the document name, replace the document, or delete the document.
3. You may now open the file that you downloaded to your computer.

If you wish to share the file within Document Manager, you do not need to download it.

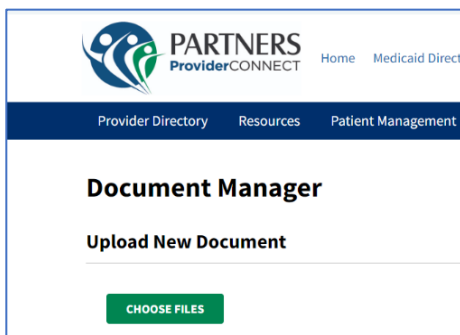
1. Select the file from the listed documents you wish to share with Partners.
2. Scroll down until you see “Sharing” with the field just below it that displays who it was shared with. Just under that, click on “SHARE...” and follow the steps below starting with Step C.1. If you do not see the link “SHARE...”, it means you are not allowed to share that document.

B. Adding a New Document

1. To Add a New Document: click “ADD DOCUMENT.”



2. Click “CHOOSE FILES” and double click the file from your computer you would like to upload.



(Note: The status of that upload will show “pending” until further action.)

Document Manager

Upload New Document

CHOOSE FILES

File	Document Name	Status	Remove
BETA Provider Portal Testing - Test Document to Upload.txt	BETA Provider Portal Testing	Pending	X

This option is helpful if other user(s) of your organization need to view the document and is not intended to share.

3. Document Manager Categories:

Document Manager Categories

<input type="checkbox"/> Health Plan Benefits	<input type="checkbox"/> Health Plan Documents	<input type="checkbox"/> Credentialing and Enrollment
<input type="checkbox"/> Health Team Correspondence	<input type="checkbox"/> Finance/Claims/Billing	<input type="checkbox"/> Access to Care/Utilization Management
<input type="checkbox"/> Reports	<input type="checkbox"/> Health Care Education	

Select the appropriate category that best describes the nature of the document for easy reference.

Note: these categories may change from time to time or may not show.

4. My Categories:

If you don't see the categories or one that best references the nature of your document, you may create one of your own. This will be saved for future use.

My Categories

ADD NEW CATEGORY

5. Comments:

Add a comment if appropriate to this document for future reference.

Comments


ADD NEW COMMENT

6. UPLOAD

Scroll down to the bottom of the screen and click **UPLOAD** to complete the process. Use the “Cancel” link to discard this upload and return to the Document Manager main screen.

UPLOAD Cancel

Wait for the document to upload completely. The status will change from "Sending" to "Complete" when it is finished uploading. Once that happens, you will be returned to the main screen where you will now see this file at the top of the list.

 **The selected files are uploading. Please stay on this page until the files have finished uploading. This page will automatically return to Document Manager if all files uploaded successfully.**

File	Document Name	Status
Sample test for document manager or secure messaging.docx	Sample test for document m	Sending

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