

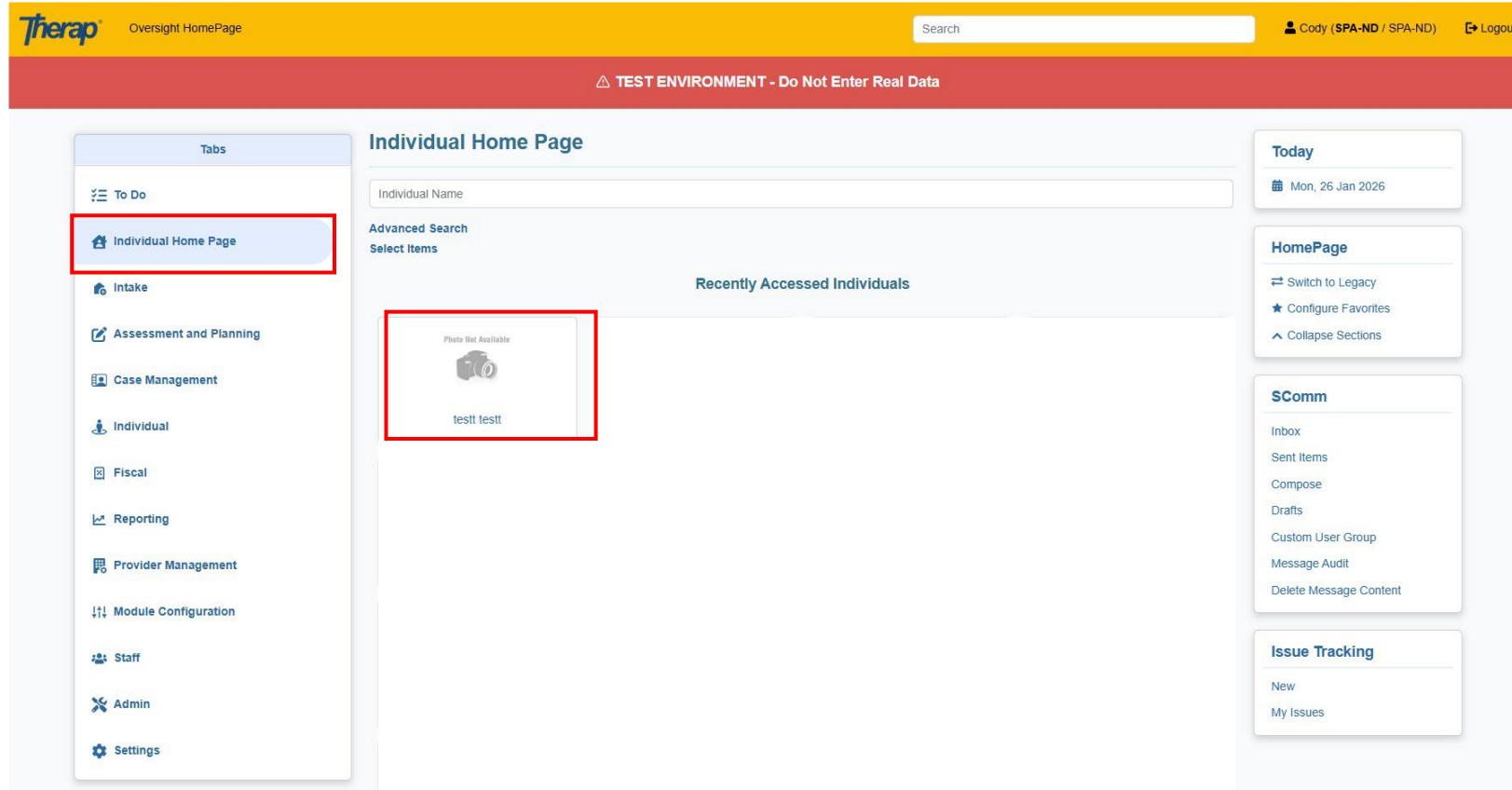


# How to save items in Therap's Document Storage in Oversight



Health & Human Services

- When you are in the Oversight Account, click on the Individual Home Page Tab, then select the member you have documents you wish to save into Therap.



The screenshot shows the Therap Oversight Home Page. The top navigation bar includes the Therap logo, 'Oversight HomePage', a search bar, and user information for 'Cody (SPA-ND / SPA-ND)'. A red banner at the top right reads 'TEST ENVIRONMENT - Do Not Enter Real Data'. The left sidebar, titled 'Tabs', lists various modules: To Do, Individual Home Page (highlighted with a red box), Intake, Assessment and Planning, Case Management, Individual, Fiscal, Reporting, Provider Management, Module Configuration, Staff, Admin, and Settings. The main content area is titled 'Individual Home Page' and contains a search bar for 'Individual Name' and an 'Advanced Search' section. Below this is a 'Recently Accessed Individuals' section, which shows a card for a user named 'testt testt' with the note 'Photo Not Available'. The right side of the page features a sidebar with sections for 'Today' (Mon, 26 Jan 2026), 'HomePage' (Switch to Legacy, Configure Favorites, Collapse Sections), 'SComm' (Inbox, Sent Items, Compose, Drafts, Custom User Group, Message Audit, Delete Message Content), and 'Issue Tracking' (New, My issues).

- When you are in the members Individual Home Page, click on Document Storage. From here you can Select New to upload a new document, List to list all documents already uploaded, or Search to search for a document.

▲ TEST ENVIRONMENT - Do Not Enter Real Data



Photo Not Available

testt testt Admitted

Home   Profile   Plans   Case Status   About Me

Modules

- ▶ Case Note
- ▼ Document Storage
  - New
  - List
  - Search
- ▶ Individual Plan
- ▶ Individual Plan Agenda
- ▶ Personal Focus Worksheet
- ▶ Pre Auth
- ▶ Referral

ISP Programs

No isp programs found to display

Go To

▼

- When you select New you will come to the following screen.
- **Type:** Enter in the most appropriate selection
- **Received Date:** Date you received the document, or the date you entered it into Therap
- **Valid From and Valid To:** Only use if needed. For example, an ROI is good for a specific time period
- **Description:** Not required but will help when you are looking through a member's documents.
- **Comment:** Not required
- **Shareable:** Select this to allow linked providers access to the document

**⚠ TEST ENVIRONMENT - Do Not Enter Real Data**

Document Storage [New](#) 

**Document Details**

Individual Name	testt testt 
* Type	<input style="width: 200px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="Please Select"/>
* Received Date	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="MM/DD/YYYY"/> 
Valid From	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="MM/DD/YYYY"/> 
Valid To	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="MM/DD/YYYY"/> 
Description	<input style="width: 800px; height: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 5px;" type="text"/>
About 200 characters left	
Comment	<input style="width: 800px; height: 150px; border: 1px solid #ccc; border-radius: 5px; padding: 5px;" type="text"/>
About 3000 characters left	
* Document	<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Add File"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Scan File"/>
Shareable	<input type="checkbox"/>

[Cancel](#) [Back](#) [Save](#)

- Once you have a document saved in the member's Document Storage, if you are working on a POC and need to attached a document from Document Storage, you can.
- Click on Add File in the POC
- This will bring up the Add File pop up. You can either Upload a file from your computer by selecting Upload. Or you can select Individual Document Lookup. This will allow you to search the member's Document Storage for the file you wish to attached to the POC.

Document Checklist

Checklist	Attachment	Description	Uploaded By	Upload Date	Action
Meeting Attendee Signatures (required for initial POCs and Annual POC reviews)					<a href="#">Add File</a>   <a href="#">Scan File</a>
Member Rights and Responsibilities					<a href="#">Add File</a>   <a href="#">Scan File</a>
Member and Care Coordinator Signatures & Acknowledgements (required for all POCs and Interim/Quarterly Reviews)					<a href="#">Add File</a>   <a href="#">Scan File</a>

[Attach Other File](#)

Add File

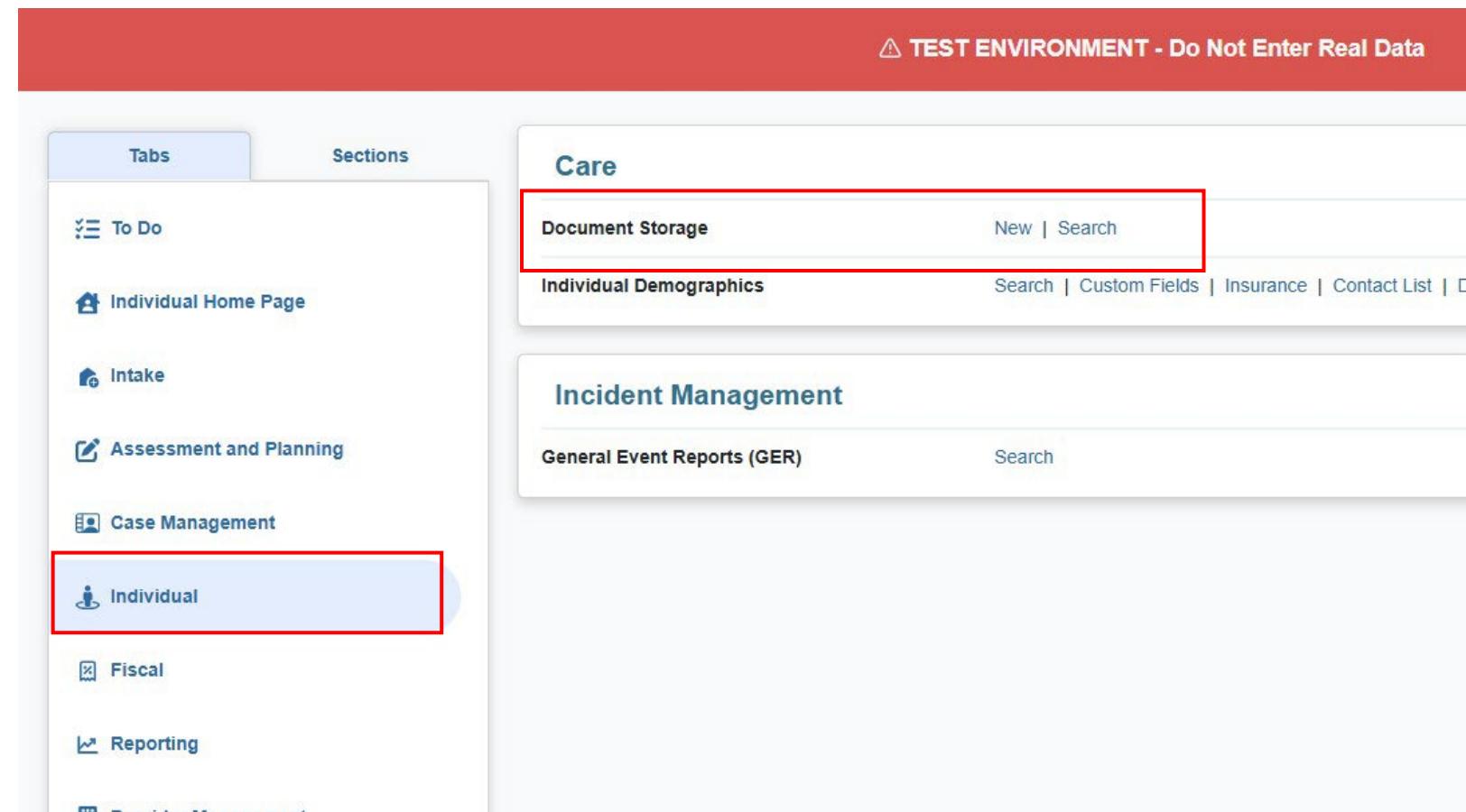
Please only upload data related to 'testt testt'  
The maximum file size allowed is 10 MB

Select File

Description

About 60 characters left

- You can also save a document, to member's Document Storage by clicking on the Individual Tab. Then in the Document Storage line, you can upload new documents by clicking on New or search for a document by clicking on Search.



The screenshot shows a software interface with a red header bar containing the text "⚠ TEST ENVIRONMENT - Do Not Enter Real Data". Below the header, there are two main sections: "Tabs" and "Sections".

The "Tabs" section is currently active, showing the following tabs:

- To Do
- Individual Home Page
- Intake
- Assessment and Planning
- Case Management
- Individual** (This tab is highlighted with a red box.)
- Fiscal
- Reporting
- Business Management

The "Sections" section is currently inactive.

On the right side, under the "Care" heading, there is a "Document Storage" section. This section is also highlighted with a red box. It contains links for "New" and "Search".

Below the "Document Storage" section, there is a "Individual Demographics" section with a "Search" link. Further down, there is an "Incident Management" section with a "General Event Reports (GER)" link and a "Search" link.

At the bottom right of the interface, there are links for "Search", "Custom Fields", "Insurance", and "Contact List".