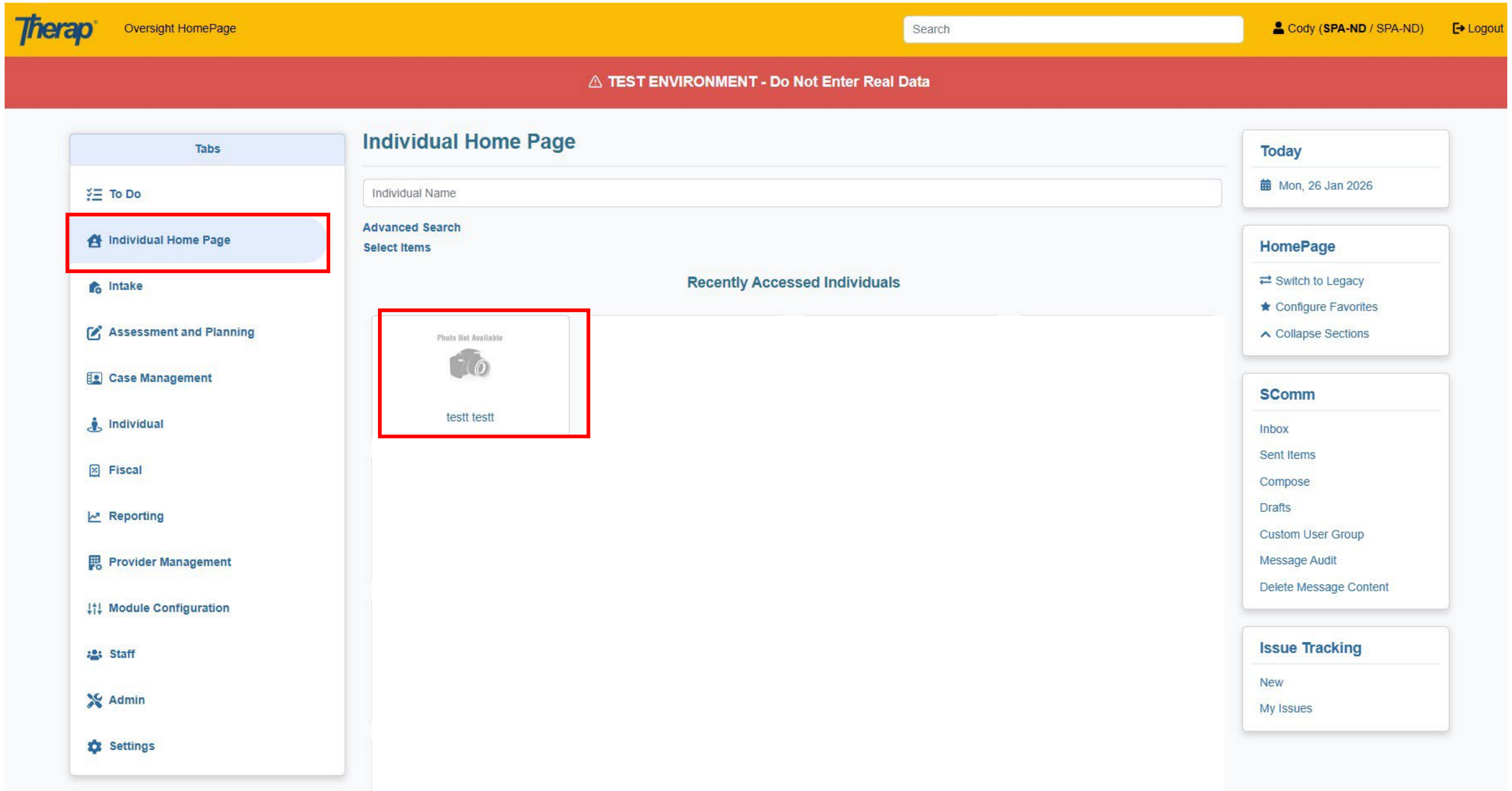
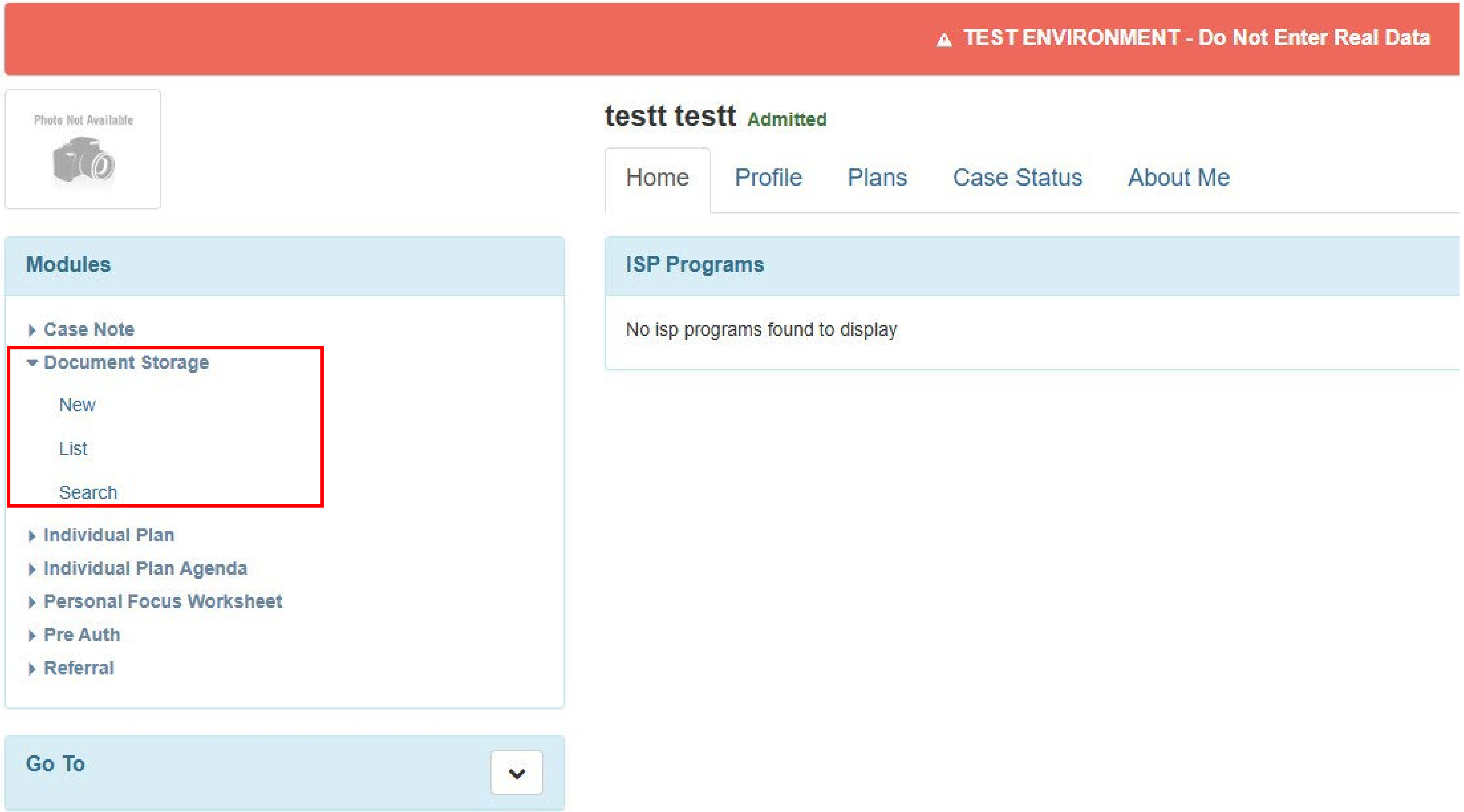
How to save items in Therap's Document Storage in Oversight

NORTH Dakota | Health & Human Services
Be Legendary.

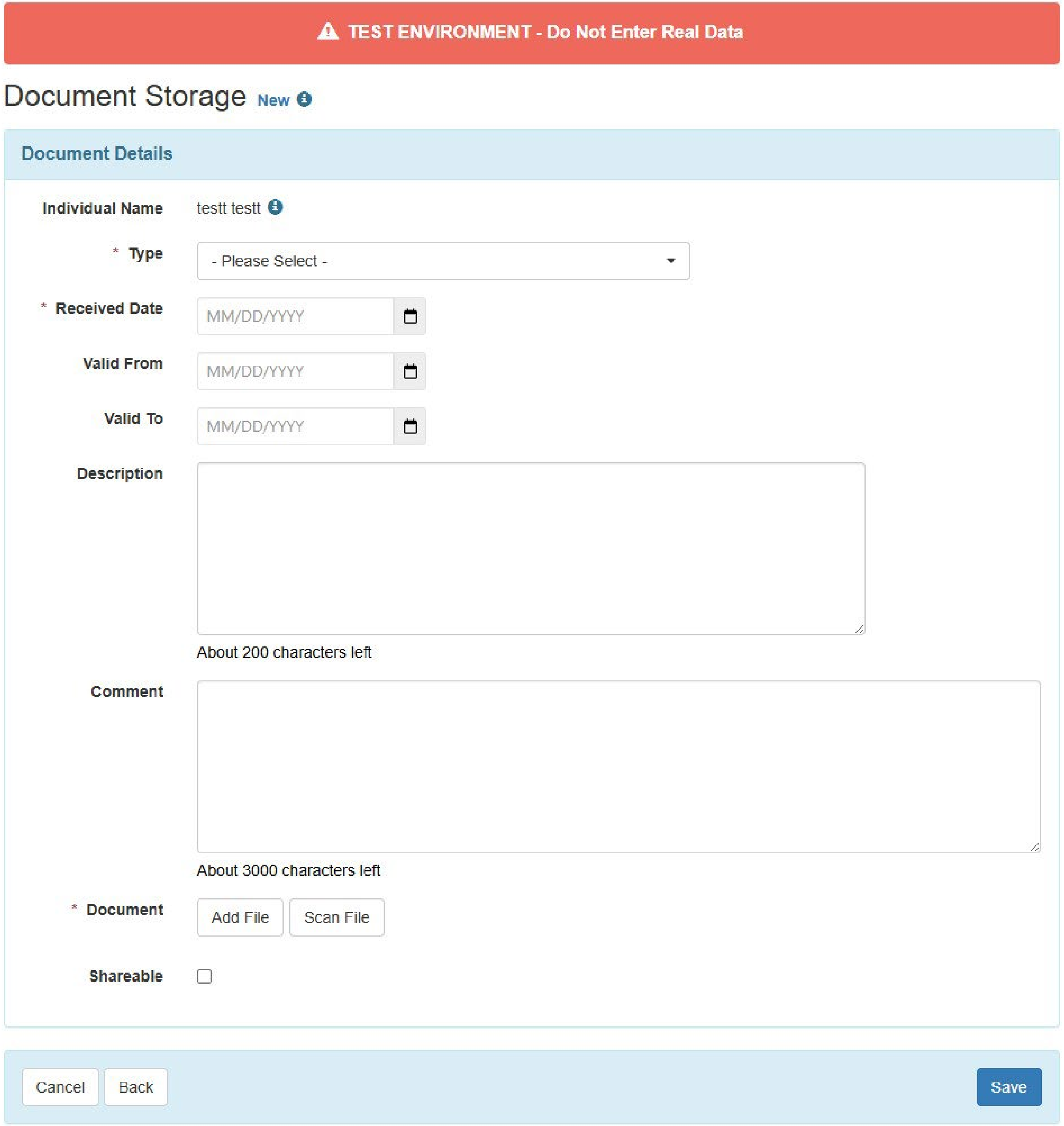
- When you are in the Oversight Account, click on the Individual Home Page Tab, then select the member you have documents you wish to save into Therap.



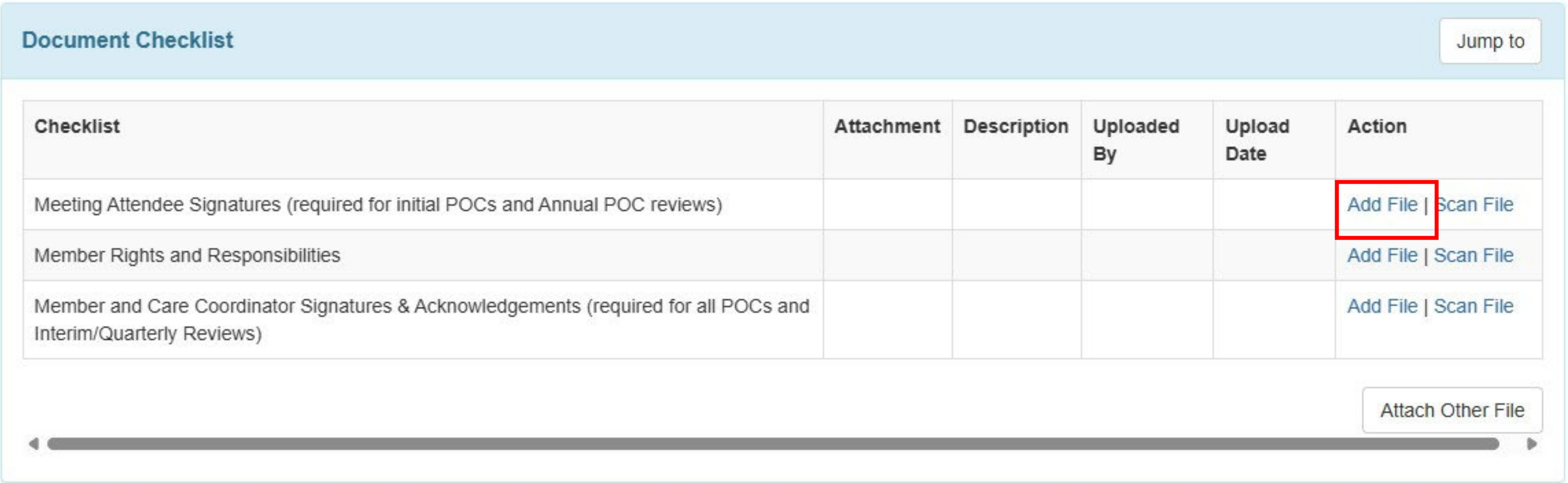
- When you are in the members Individual Home Page, click on Document Storage. From here you can Select New to upload a new document, List to list all documents already uploaded, or Search to search for a document.

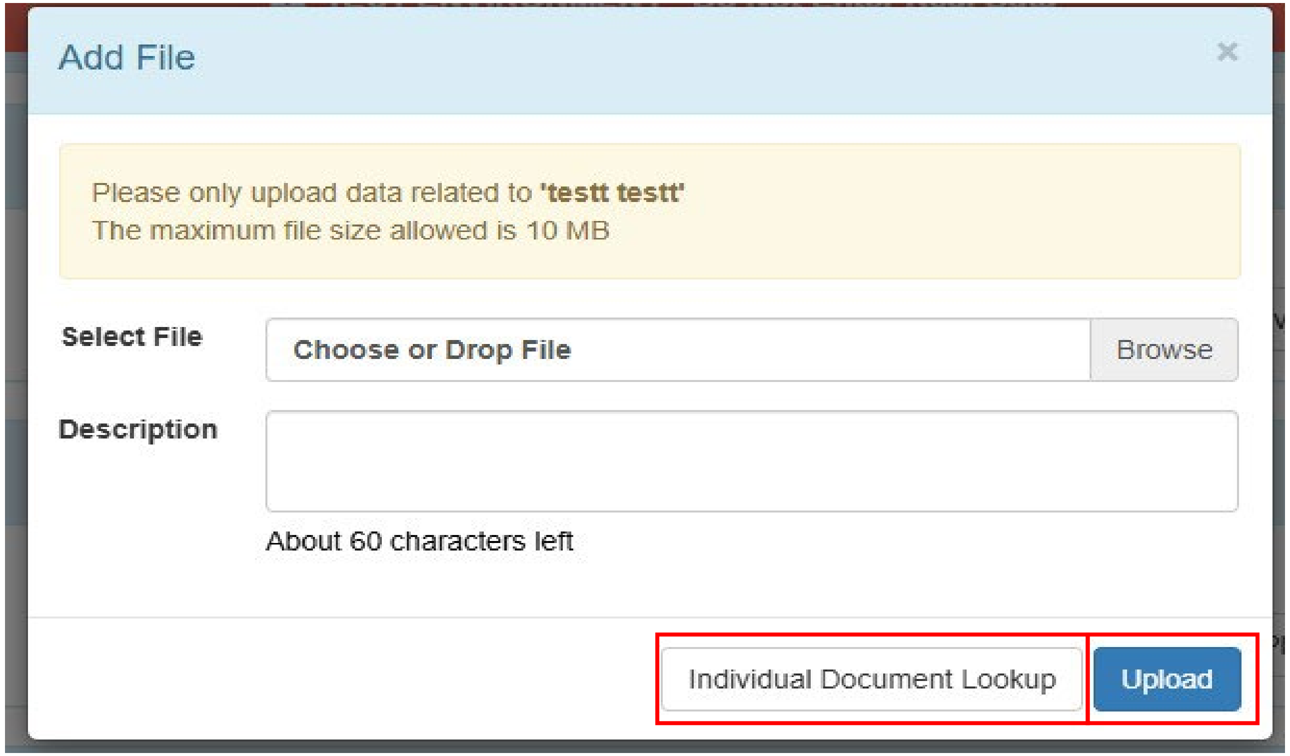


- When you select New you will come to the following screen.
- **Type**: Enter in the most appropriate selection
- **Received Date**: Date you received the document, or the date you entered it into Therap
- **Valid From and Valid To**: Only use if needed. For example, an ROI is good for a specific time 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



- 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.





- You can also save a document, to member’s Document Storge 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.