



# 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 displays the Therap Oversight Home Page. At the top, a yellow header bar contains the Therap logo, the text "Oversight HomePage", a search bar, and user information "Cody (SPA-ND / SPA-ND)" with a "Logout" button. Below this is a red banner with the warning "TEST ENVIRONMENT - Do Not Enter Real Data".


The main interface is divided into three sections:

- Left Sidebar (Tabs):** A vertical list of navigation options. The "Individual Home Page" tab is highlighted with a red box. Other tabs include "To Do", "Intake", "Assessment and Planning", "Case Management", "Individual", "Fiscal", "Reporting", "Provider Management", "Module Configuration", "Staff", "Admin", and "Settings".
- Center Content Area:** Titled "Individual Home Page", it features a search bar for "Individual Name". Below this is a section for "Advanced Search" with a "Select Items" button. The main content area is titled "Recently Accessed Individuals" and displays a list of individuals. The first entry, "testt testt", is highlighted with a red box and includes a placeholder image labeled "Photo Not Available".
- Right Sidebar:** Contains three panels: "Today" showing the date "Mon, 26 Jan 2026"; "HomePage" with links for "Switch to Legacy", "Configure Favorites", and "Collapse Sections"; and "SComm" with links for "Inbox", "Sent Items", "Compose", "Drafts", "Custom User Group", "Message Audit", and "Delete Message Content".

- 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



Modules

▶ Case Note

▼ Document Storage

NewListSearch

▶ Individual Plan

▶ Individual Plan Agenda

▶ Personal Focus Worksheet

▶ Pre Auth

▶ Referral

Go To

▼

testt testt Admitted

Home

Profile

Plans

Case Status


About Me


ISP Programs

No isp programs found to display




- 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

- Please Select -




\* Received Date

MM/DD/YYYY




Valid From

MM/DD/YYYY



Valid To

MM/DD/YYYY



Description

About 200 characters left

Comment

About 3000 characters left

\* Document

Add File

Scan File

Shareable

☐

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.

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

Choose or Drop File

Browse

Description

About 60 characters left

Individual Document Lookup

Upload

- 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.

