

# Uploading Supporting Documents

## Uploading Documents at the Time of Entering Level 1:

1. Upon reaching Page 11 of the Level 1 online form, the system will request that you upload any required documents. Based on the outcome of the Level 1 screening, the portal will identify the required documentation that must be submitted with the Level 1 screening. The user must manually place a checkmark next to each document uploaded. All required documents must be checked and uploaded.

**Supplemental Documents: below would be REQUIRED for upload. Please check off all of the files and provide documentation below.**

☒ Psych Evaluation

☒ Admission notes to hospital including primary diagnosis H&P

☒ Reason seeking convalescent care (i.e., requires rehab, or further nutritional support & education)

### Upload File(s)

Please select "Upload Another File" queue at the bottom if you have more than one file to upload.

#### File Name and Upload

Name of File \*

Upload Selected File(s) \*

**Choose File**

No file chosen

[Upload Another File](#)

2. Create a name for each file in the "Name of File" field and click the "Choose File" button to locate and attach the document from your computer.
3. If you are uploading more than one document, click "Upload Another File" to open another box.

- Once “Upload Another File” is clicked, additional fields will be displayed to upload more documents.

**File Name and Upload**

Name of File \*

Upload Selected File(s) \*

Choose File

No file chosen

**File Name and Upload**

Remove

Name of File \*

Upload Selected File(s) \*

Choose File

No file chosen

Upload Another File

- There is a section for “Optional Supplemental Documentation For Upload.” To submit any additional documentation, follow the same steps as noted above.

**Optional Supplemental Documentation For Upload**

☐ Face Sheet
   
☐ Current Medication List
   
☐ H&P (History & Physical Examination)
   
☐ Hospital D/C summary (if for significant change)
   
☐ PT/OT Evaluation (if available)

**Save and Continue to Confirmation Page**

- When you are done, click “Save and Continue to Confirmation Page” and complete the Submission Process.

## Uploading Documents to a Submitted and/or Accepted Level 1 Form


1. *If no Level 2 has been created*, and you need to upload more documentation to a Level 1 after it has been submitted and/or accepted, enter the record through the “Level 1 Submitted” tab or “Level 1 Accepted” tab by clicking on the L1 number in blue.

### Level 1 Referrals Submitted Referrals ▼

2 items • Sorted by Level 1 Form ID • Filtered by

	Level 1 For... ↑ ▼	Individu..
1	<a href="#">L1-034419</a>	Wilma

2. Once you are in the Level 1 form screen, you’ll see a button on the page's right side to add files. Click “Add Files.”

 Level 1 Form  
L1-034419

▼ Information
 

Folder  
[Wilma Flintstone Folder](#)

Referral Status  
 Submitted

Submitted Date  
 Submitted Date


Healthcare Organization  
[South...](#)


Rejected Reason  
 Rejected Reason


EUP Related Reason  
 EUP Related Reason

Files (3)
 

Add Files

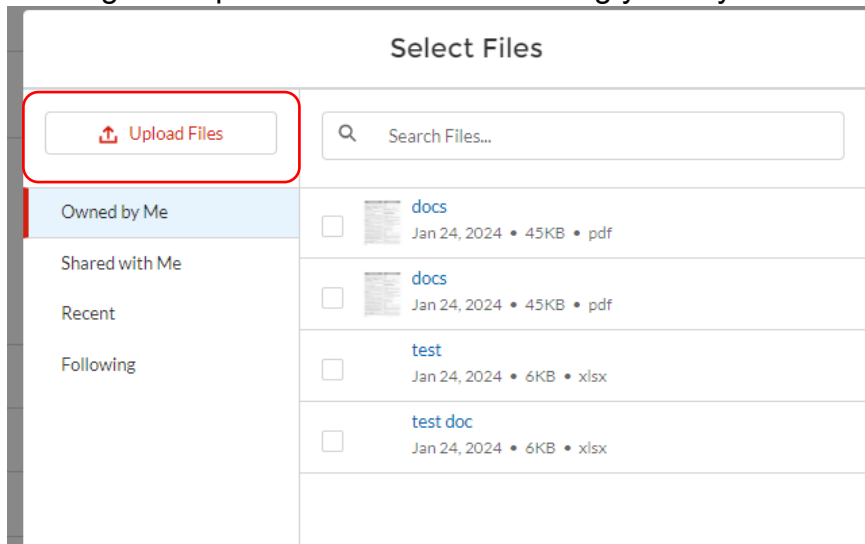
 Level 1 Referral...  
Jan 24, 2024 • ...

 docs  
Jan 24, 2024 • ...

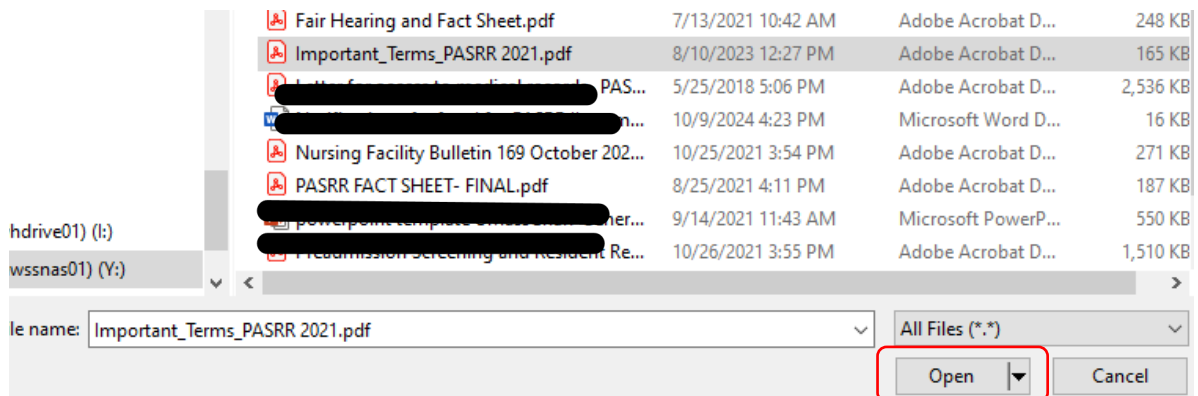
 docs  
Jan 24, 2024 • ...

[View All](#)

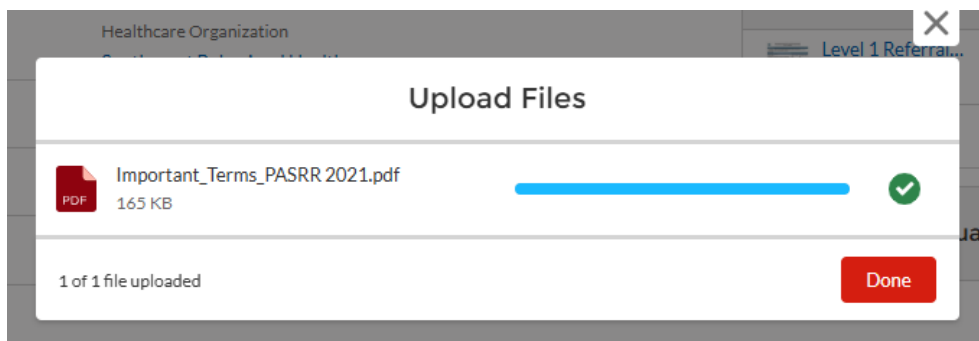
- This will open the “Select Files” box, allowing you to add more documents. Clicking the “Upload Files” button will bring you to your internal file system.



- Choose the document you want to upload from your internal system and click “Open.”



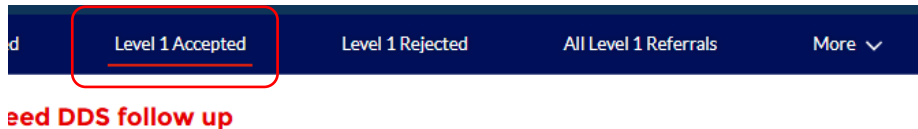
- You will receive the following notification. Click “Done.”



## Uploading Documents to a Level 2 After it Has Been Created

When a Level 1 form has been accepted, and a Level 2 evaluation has been created, you can upload additional documents through the created Level 2 evaluation. You may reach the Level 2 evaluation link via the Level 1 form.

1. To access the Level 1 form, go to the “Level 1 Accepted” tab and search for the Level 1. You may add the name to the search bar for a quicker location.



2. Click on the corresponding L1 number in blue.

	Level 1 F... ↑ ▾	Individu... ▾	Individ...
1	<a href="#">L1-034501</a>	Charlotte	Webb

3. From this screen, you will see the L2 number in blue. Click on the Level 2 number to open the record.

Level 1 Form  
**L1-034501**

Information

Folder  
[Charlotte Webb Folder](#)

Referral Status  
Accepted

Submitted Date  
7/2/2024

Screening Type  
Preadmission

Created Date/Time  
7/2/2024, 2:12 PM

Individual Account  
[Charlotte Webb](#)

Healthcare Organization  
[South...](#)

Rejected Reason

EHD Rejected Reason

Files (0) [Add Files](#)

[Upload Files](#)

Or drop files

**Level 2 Evaluations (1)**

Level 2 Form ID  
[L2-076011](#)

- On the Level 2 record page, you will see the Files box on the right. Click on the “Upload Files” button to access your internal files.

Level 2 Evaluation  
L2-076011

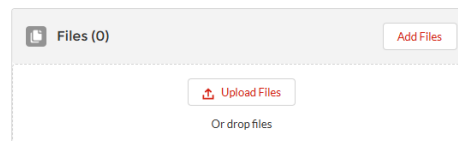
Folder  
[Charlotte Webb Folder](#)

Individual DOB  
7/8/1942

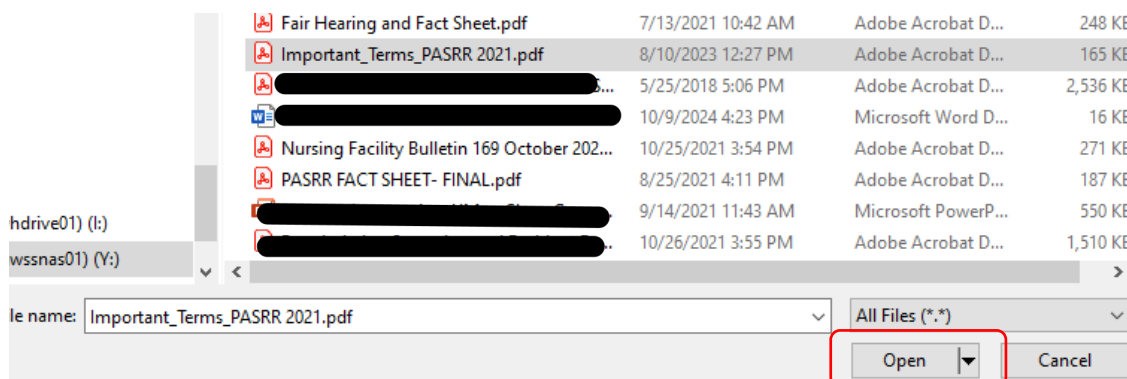
Individual Account  
[Charlotte Webb](#)

Folder ⓘ

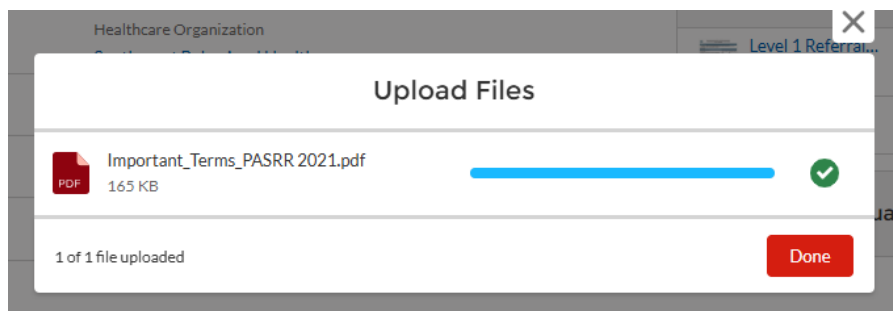
[Charlotte Webb Folder](#)



- Choose the document you want to upload from your internal system and click “Open.”



- You will receive the following notification. Click on “Done”.



## Uploading Documents to a 12-Month Resident Review Level 2:

If you are searching for a 12-Month Resident Review that does not have a Level 1 in the system, there are two ways to locate Level 2 in the portal.

1. Use the search bar at the top of the screen to find either the individual's Level 2 ID number (if known) or name.

Or

- a. In the search results, click on the Level 2 number and enter the record.

LEVEL 2 FORM ID
L2-080122

- b. The name will bring you to all documents related to the individual. In the search results, locate the current Level 2 ID number for the 12-Month Resident Review and click on the link to enter the record.

LEVEL 2 FORM ID	
L2-077125	↑
L2-080122	↑
L2-077125	↑

2. Once you have entered the Level 2 record, you can upload the documents following the instructions in Section C, steps 4 through 6.