

How to Upload and Manage Files

This guide provides a walkthrough for navigating a file uploader. Follow these steps to efficiently upload images, manage file selections, and clear unwanted items from your upload queue.

1 Click here to access File Manager

The screenshot shows the 'Patient Demographics' form for patient ID 2359, TEST, OASIS E2. The form includes fields for patient information, insurance, physician, and various clinical and administrative details. A red circle highlights the 'File Manager' link in the top right corner of the form.

Patient Demographics

ID Lookup: 2359, Name Lookup: TEST, OASIS E2 (2359), POC Cert Period: 05/22/2026 Thru 07/20/2026

Active Patients Only, Office: , Pim. Ins.: A, 2nd, Pt Attachments, Profile, Intake

Status: INTAKE

SOC Date: 4/7/2027, Inactive Date, Deceased Date, S.A.F. Date

Primary Insurance Company: MEDICARE, Primary Ins. ID: , Medicare ID: 123456789, Medicaid ID: TEST052026, PMC / Member ID: , PECOS: 05/06/2026 Found, PartB, DME, Not HHA Certified

Primary Physician: AARON, ARIELA, New, 1225438468, POC Expires: 13 Days

Responsible Employee: HENRY, JOHN (17)

Visit Location (if Different) / Comments: Location: 525 TEST ST, TEST, Comments: VISIT PT AT DAUGHTER'S HOME

Other Contact Information: TEST

Unique Patient Type: , Agency Relationship: H, Agency Use: , HIPAA Special Precautions: , Alerts / Precautions: Alert, Fall Risk, HOH, Child in Home (under 18), Veteran, Vulnerable, Lives Alone, Dog, Medical Home, Telehealth, Disabled, Frail, Cat, Area Agency on Aging, Nursing Home, Dialysis, Escort Req'd, O2, Bedbound, Disoriented, Smokes, IV, Other: , Advanced Directives: Full Code, DNR, DNR - Arrest, Comfort Measures, No Advance Directive, Living Will, POA, DPOAHC, POLST/MOLST

Current Therapies

SN, HHA, Home Friend, Music, PHC, PT, IV, Massage, Volunteer, PAP, OT, MHR, Nutrition, Respite, PCS, ST, Companion, Homemaker, Pet, MDCP, MSW, Housekeep, Phone, Chaplin/Spiritual, ADC

Supervisor Visits

Next HHA Supervisory Visit: HHA C.P.

2 Click this image.

Patients (Demographics) Allegheny Software Management, Inc.

ID Lookup: 2359 Name Lookup: TEST, OASIS E2 (2359) POC Cert Period: 05/22/2026 Thru 07/20/2026

Active Patients Only Office: Prim. Ins: A 2nd

Pt Attachments Profile Intake

Patient Demographics Status: INTAKE

Patient ID: 2359 Last Name: TEST First Name: OASIS E2 MI:

Address: 444 SMALL STREET

City: ST MARYS State: PA Zip: 15857 County: CBSA: 99945 BERKS

Date of Birth: 5/28/1945 Sex: MALE Marital Status: WIDOWED SSN: N/A Nickname:

Home Phone: Work/Cell: Contact e-mail address: e-mail use:

Office: Team: Locality:

Primary: Race: Language: English Ethnicity: Not Hispanic

EVV ID: Include Exclude

Alerts / Precautions HIPAA Special Precautions

☐ Alert ☐ Fall Risk ☐ HOH ☐ Child in Home (under 18) ☐ Veteran

☐ Vulnerable ☐ Lives Alone ☐ Dog ☐ Medical Home ☐ Telehealth

☐ Disabled ☐ Frail ☐ Cat ☐ Area Agency on Aging ☐ Nursing Home

☐ Dialysis ☐ Escort Req'd ☐ O2 ☐ Bedbound ☐ Home

☐ Disoriented ☐ Smokes ☐ IV ☐ Other:

Advanced Directives

☐ Full Code ☐ DNR ☐ DNR - Arrest ☐ Comfort Measures ☐ No Advance Directive

☐ Living Will ☐ POA ☐ DPOAHC ☐ POLST/MOLST

SOC Date 4/1/2027 **Inactive Date** **Deceased Date** **S.A.F. Date**

Primary Insurance Company MEDICARE Primary Ins. ID: Medicare ID: 123456789 Medicaid ID: TEST052026 PMC / Member ID:

Primary Physician New 1225438468 PECS: 05/06/2026 Found AARON, ARIELA PartB, DME Not HHA Certified

Responsible Employee HENRY, JOHN (17) POC Expires: 13 Days

Visit Location (If Different) / Comments Location: 525 TEST ST, TEST... Comments: VISIT PT AT DAUGHTER'S HOME

Other Contact Information TEST

Unique Patient Type Agency Relationship Agency Use

Current Therapies

☐ SN ☐ HHA ☐ Home Friend ☐ Music ☐ PHC

☐ PT ☐ IV ☐ Massage ☐ Volunteer ☐ PAP

☐ OT ☐ MHR ☐ Nutrition ☐ Respite ☐ PCS

☐ ST ☐ Companion ☐ Homemaker ☐ Pet ☐ MDCP

☐ MSW ☐ Housekeep ☐ Phone ☐ Chaplin/Spiritual ☐ ADC

Supervisory Visits Next HHA Supervisory Visit: HHA C.P.

Demographics Activities Schedule Masters Diagnosis Medical Information Physicians Medications Emergency Therapies Care Plans Insurance Authorizations Misc Info / EVV Notes Billing Skilled Scheduling Goals Exit

3 Click "Click or drop files to upload". Select the files from your computer that you want to attach to this patient

JHN (17) POC Expires: 13 Days

Visit Location (If Different) / Comments 525 TEST ST, TEST... VISIT PT AT DAUGHTER'S HOME

Contact Information

File Transfer

Click or drop files to upload

File Name	Erase	Mark	Size	Action
-----------	-------	------	------	--------

No file has been transferred yet.

- 4 Click "X" once you see your files/documents

LA

Not HHA Certified

Employee

(17)

POC Expires: 13 Days

on (If Different) / Comments

TEST ST, TEST...

SIT PT AT DAUGHTER'S HOME

act Information

File Transfer

Therapies

Care Plans

Insurance

Authorizations

Misc Info / EVV

Notes

X

Click or drop files to upload

File Name	Erase	Mark	Action	Action
Wound Measurements Review via Control Board 09162...			OK	X
Wound Enhancements 10162025.docx			OK	X
Surveyor Edit Directions.pdf			OK	X

- 5 Click here to open attachments. Do not use the + to attach multiple attachments

Patients (Demographics) Allegheny Software Management, Inc.

ID Lookup: 2359

Name Lookup: TEST, OASIS E2 (2359)

POC Cert Period: 05/22/2026 Thru 07/20/2026

Active Patients Only

Office:

Prim. Ins. A

2nd

Pt Attachments

Add

Save

Cancel

Delete

Patient Demographics

Status: INTAKE

Patient ID: 2359

Last Name: TEST

First Name: OASIS E2

MI:

Address: 444 SMALL STREET

City: ST MARYS

State: PA

Zip: 15857

County: CBSA: 99945

BERKS

Date of Birth: 5/28/1945

Sex: MALE

Marital Status: WIDOWED

SSN: N/A

Nickname:

Home Phone:

Work/Cell:

Contact e-mail address:

e-mail use:

Office:

Team:

Locality:

Primary: Race:

Language: English

Ethnicity: Not Hispanic

EVV ID:

Include

Exclude

Alerts / Precautions

Alert

Fall Risk

HOH

Child in Home (under 18)

Veteran

Vulnerable

Lives Alone

Dog

Medical Home

Telehealth

Disabled

Frail

Cat

Area Agency on Aging

Nursing Home

Dialysis

Escort Req'd

O2

Bedbound

Disoriented

Smokes

IV

Other:

Advanced Directives

Full Code

DNR

DNR - Arrest

Comfort Measures

No Advance Directive

Living Will

POA

DPOAHC

POLST/MOLST

SOC Date: 4/1/2027

Inactive Date:

Deceased Date:

S.A.F. Date:

Primary Insurance Company: MEDICARE

Primary Ins. ID:

Medicare ID: 123456789

Medicaid ID: TEST052026

PMC / Member ID:

Primary Physician: New 1225438468

PECOS: 05/06/2026 Found

AARON, ARIELA

Not HHA Certified

Responsible Employee: HENRY, JOHN (17)

POC Expires: 13 Days

Visit Location (If Different) / Comments

Location: 525 TEST ST, TEST...

Comment: VISIT PT AT DAUGHTER'S HOME

Other Contact Information

TEST

Unique Patient Type:

Agency Relationship:

Agency Use:

Current Therapies

SN

HHA

Home Friend

Music

PT

IV

Massage

Volunteer

OT

MHR

Nutrition

Respite

ST

Companion

Homemaker

Pet

MSW

Housekeep

Phone

Chaplin/Spiritual

PHC

PAP

PCS

MDCP

ADC

Supervisory Visits

Next HHA Supervisory Visit:

HHA C.P.

Demographics

Activities

Schedule Masters

Diagnosis

Medical Information

Physicians

Medications

Emergency

Therapies

Care Plans

Insurance

Authorizations

Misc Info / EVV

Notes

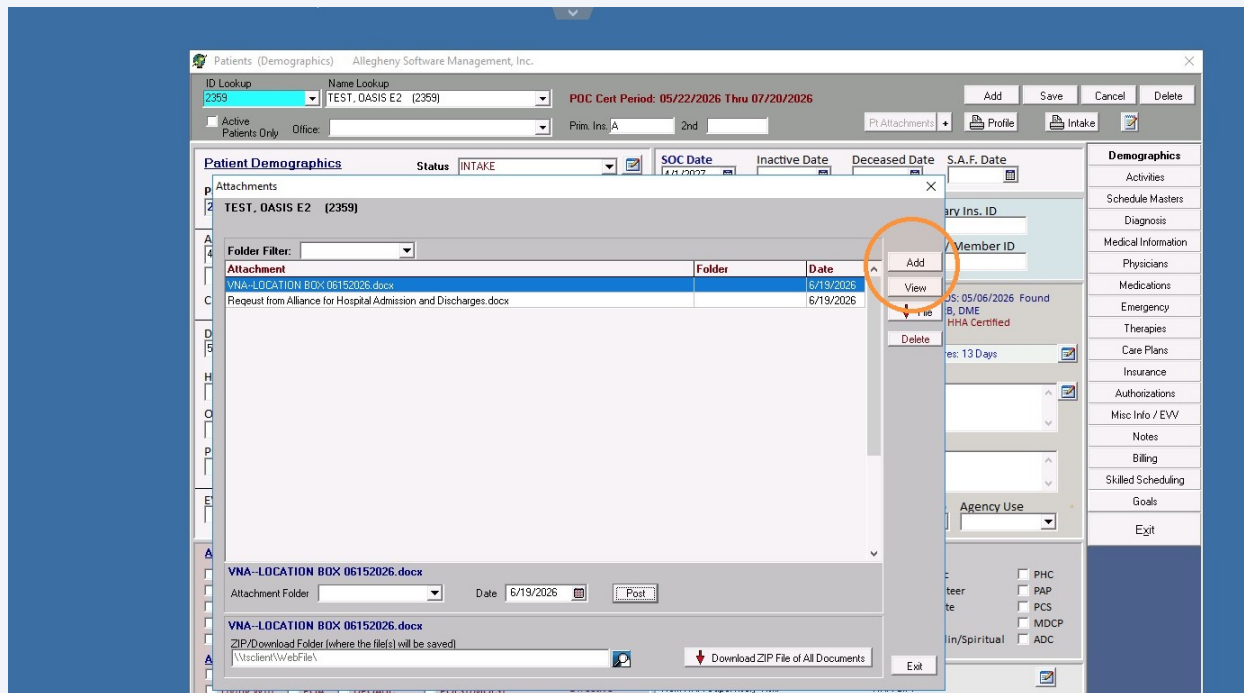
Billing

Skilled Scheduling

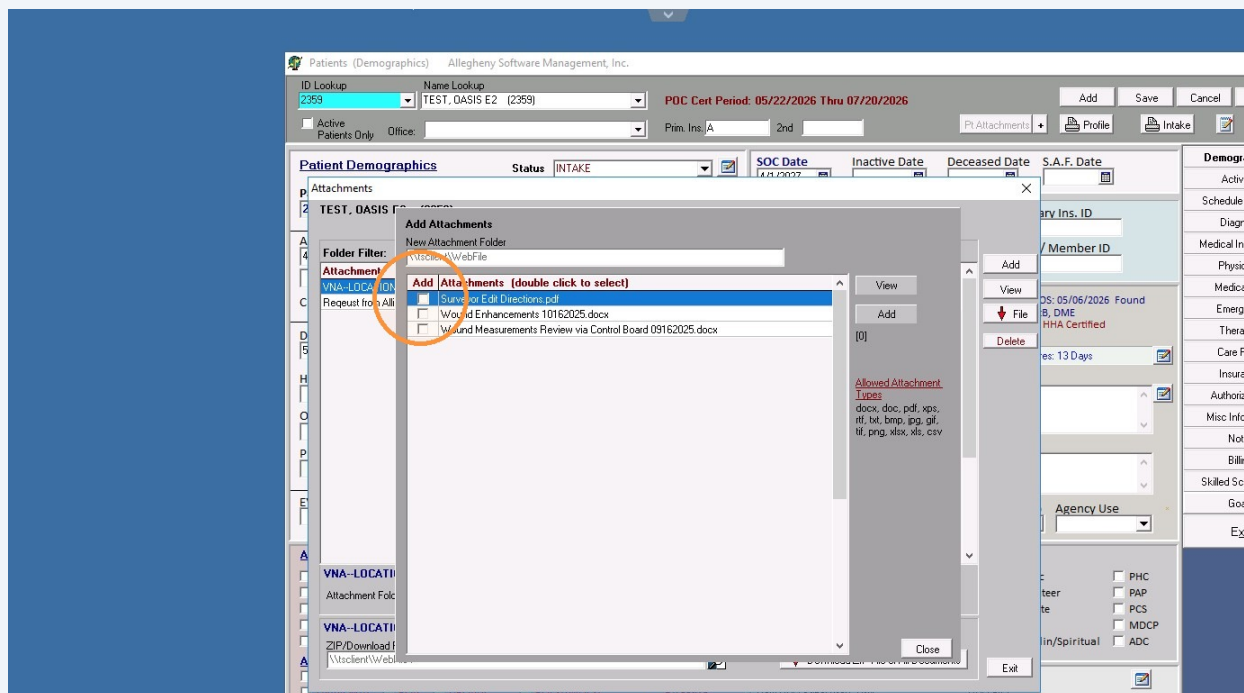
Goals

Exit

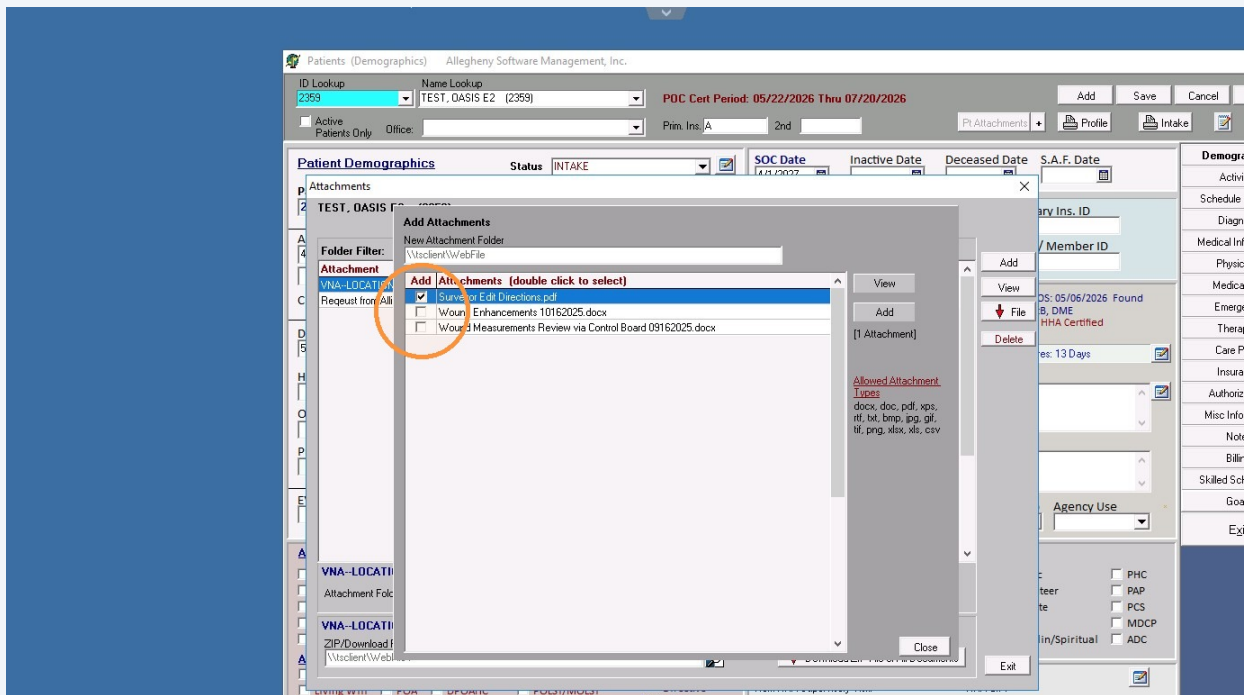
6 Click here. Click to Add button



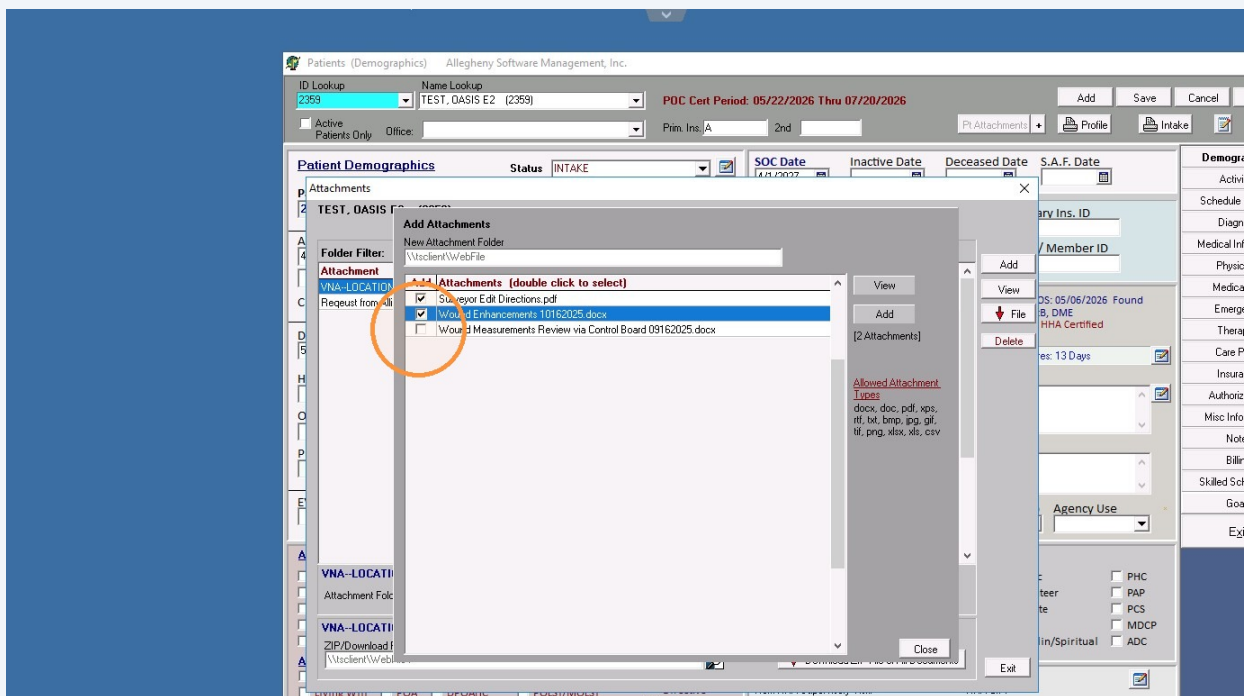
7 Double-click here. Double click the files/documents you want to attach



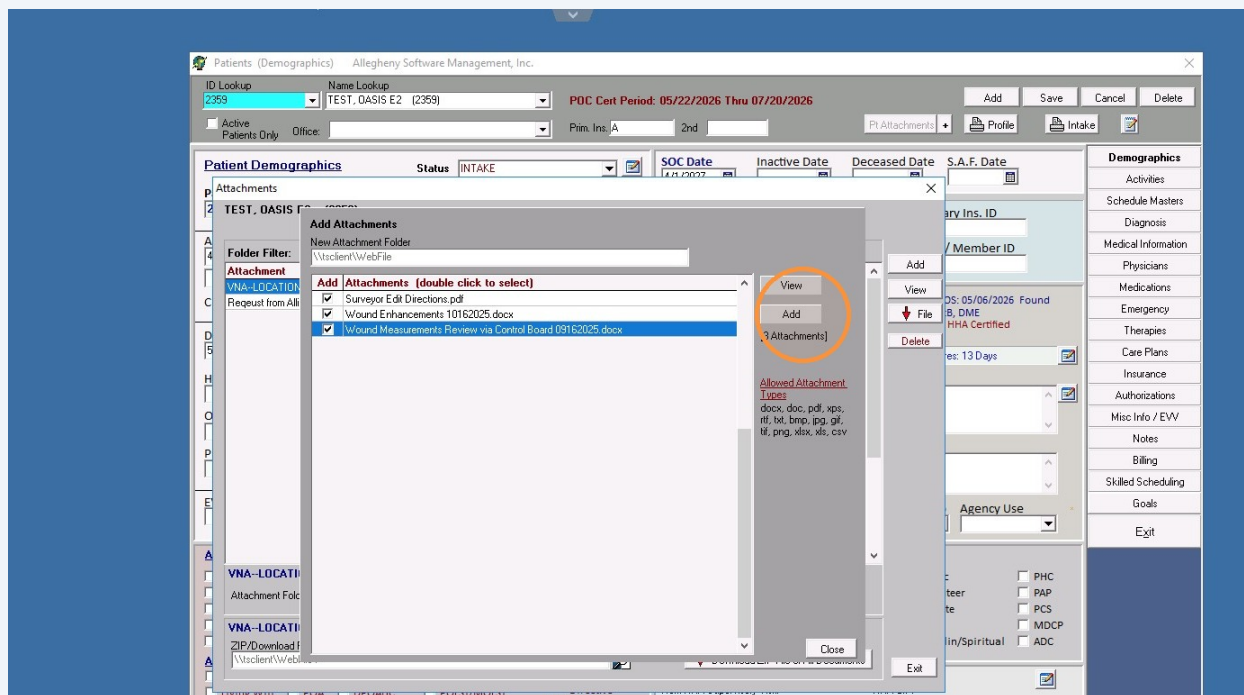
8 Double-click here.



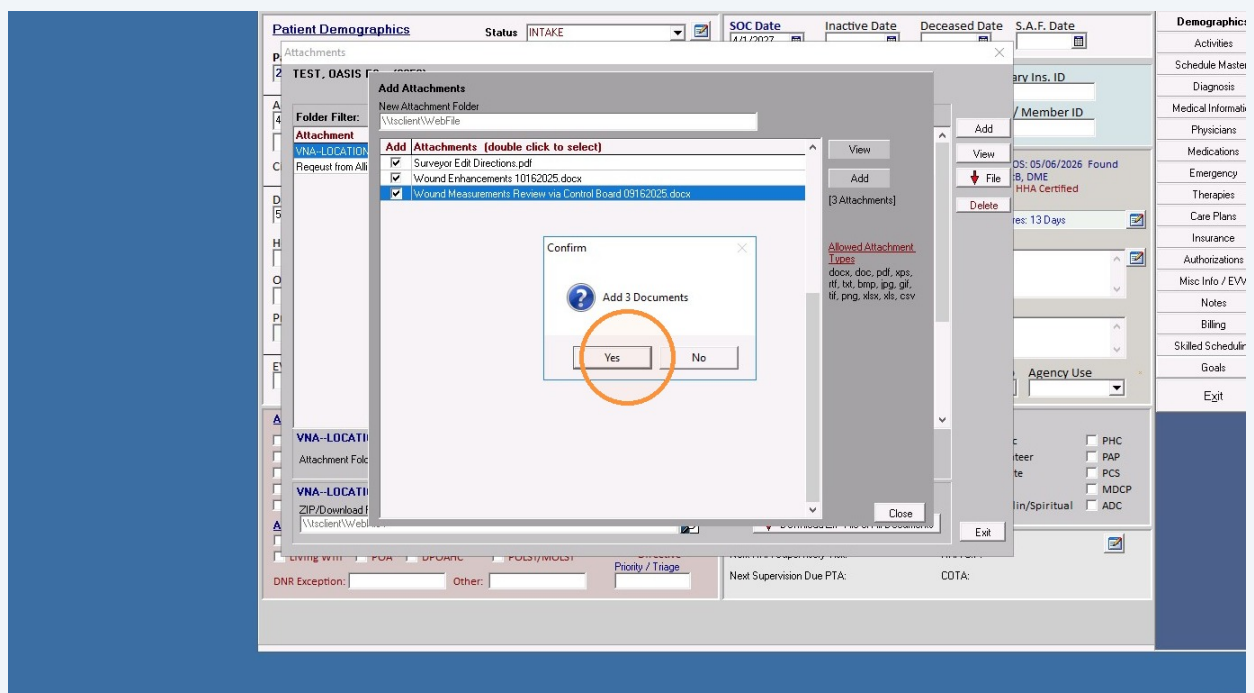
9 Double-click here.



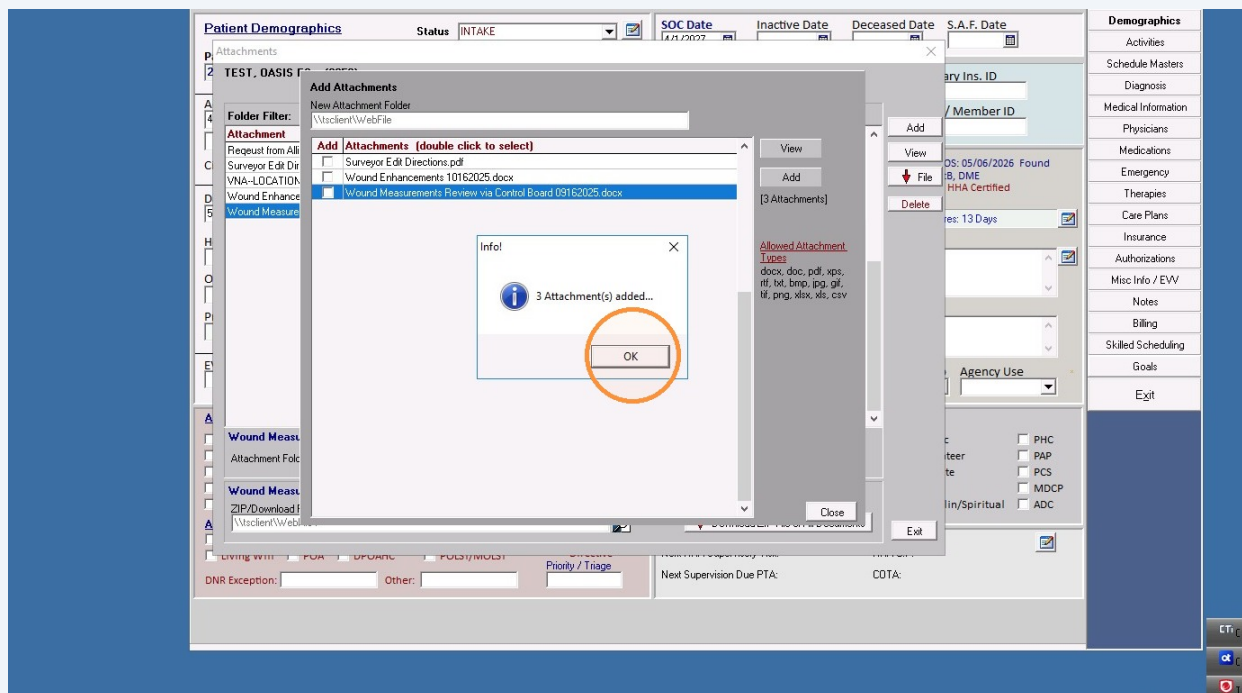
10 Click here. Click the Add button



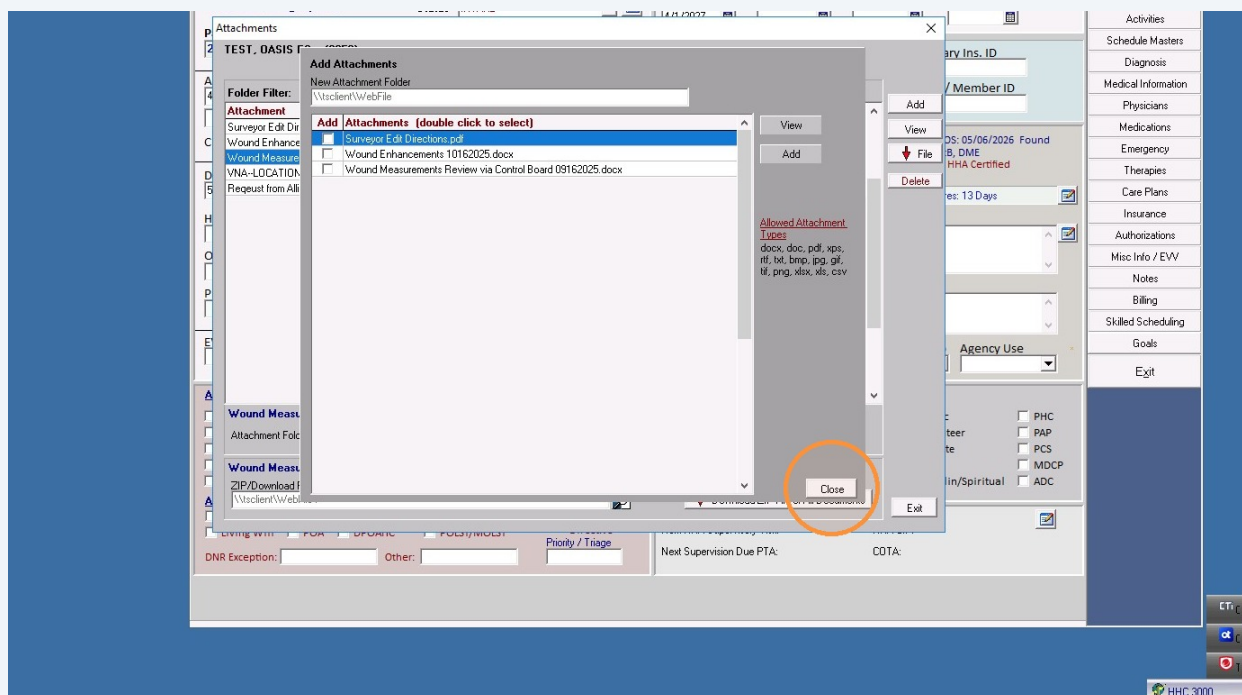
11 Click here.



12 Click here.

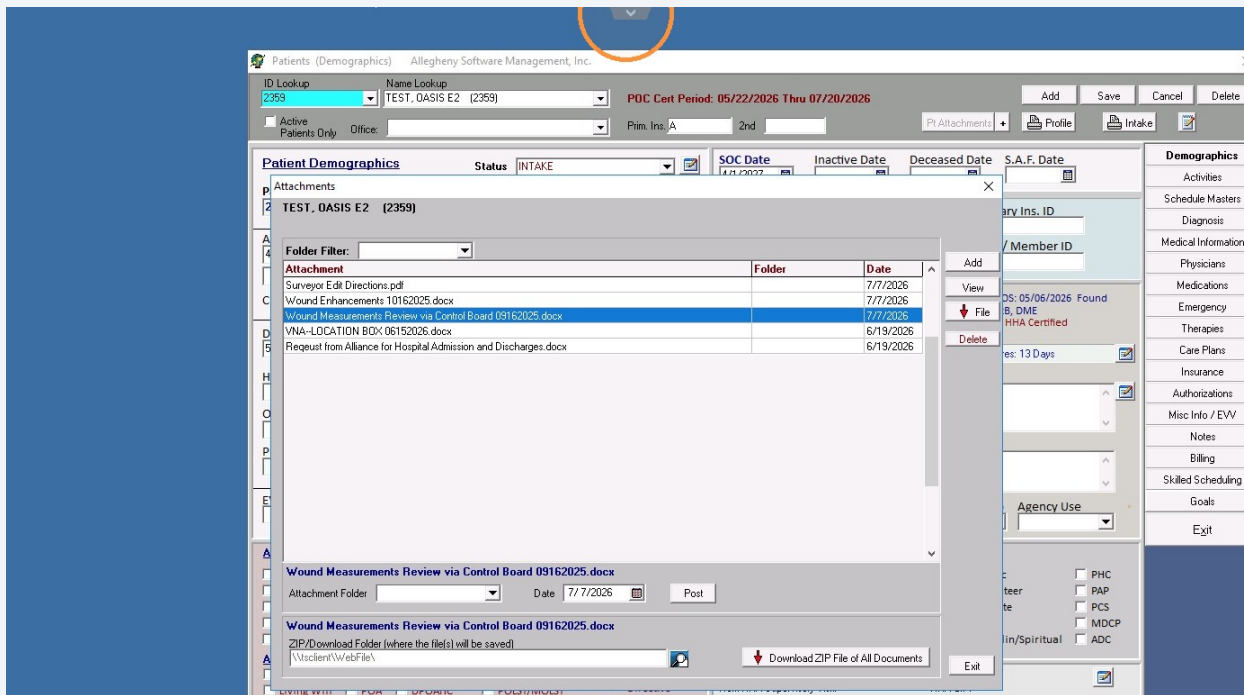


13 Click here.



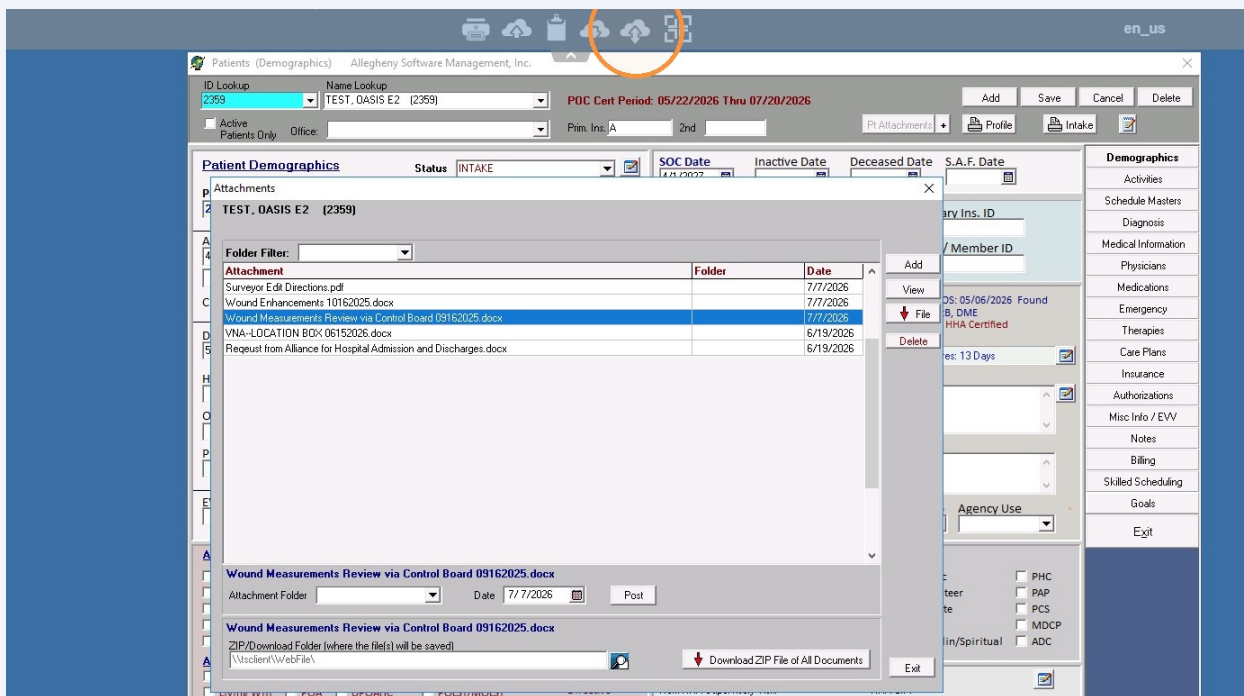
14

Click here. Go back to File Manager to delete the previously selected files before you switch to another pt.



15

Click this image.



- 16 Click "X" to remove the files that you no longer need

The screenshot shows a 'File Transfer' window with a sidebar on the right containing links: 'Authorizations', 'Misc Info / EVV', and 'Notes'. The main area has a header 'Click or drop files to upload' and a table with the following data:

File Name	Erase	Mark	Size	Action
Surveyor Edit Directions.pdf	☐	☐	5.49MB	X
Wound Enhancements 10162025.docx	☐	☐	547.36KB	X
Wound Measurements Review via Control Board 09162...	☐	☐	329.87KB	X

The 'X' in the first row's 'Action' column is circled in orange.

- 17 Click "X"

The screenshot shows a 'File Transfer' window with a sidebar on the right containing links: 'Therapies', 'Care Plans', 'Insurance', 'Authorizations', 'Misc Info / EVV', and 'Notes'. The main area has a header 'Click or drop files to upload' and a table with the following data:

File Name	Erase	Mark	Size	Action
7/7/2026	☐	☐		X
6/19/2026	☐	☐		X
6/19/2026	☐	☐		X

The 'X' in the first row's 'Action' column is circled in orange.