## Advantmed **Provider Upload – Process Document**

**Prepared For: Provider** 

**Prepared by:** 

**Advantmed Team** 



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#### How to Upload Charts?

Provider Upload page will open once you use the below link mentioned on the Fax Packet; to open in any browser.



Advantmed Provider Upload page will open up as shown below. Here, user has to enter "Provider ID" which is mentioned on "Fax Packet".

Advantmed	0				
Record Upload Details				Tutorial Videos	Guidelines 🛓
Advantmed Provider ID * (On Request Package)		<b>Comments</b> (0/1000)			
File Password (If any)	۲		<i></i>		
	Drop fil				
Select File			Please select file(s) to upload.		

Provider ID will be there on the top of the first page of the fax packet as shown below.



User can also enter Password (password is required only when documents/records are password protected. If the file is not password protected, kindly leave this section empty) & Comments (if user wants to share any), in below highlighted fields.

Record Upload Details				Tutorial Videos	Guideline
Advantmed Provider ID * (On Request Package)	1234567	<b>Comments</b> (0/1000)			
File Password (If any)	e		ĥ.		
	Drop	files here			
Select File			Please select file(s) to upload.		

After entering Provider ID, user has to click on "**Select File**" button as shown below.

Record Upload Details		Tutorial Videos	Guidelines 🚣		
Advantmed Provider ID * (On Request Package)	1234567	<b>Comments</b> (0/1000)			
File Password (If any)	۲		ĺ.		
	Drop fil				
Select File			Please select file(s) to upload.		

File window will open up as shown below from where user can select files/charts, which need to be uploaded. After selecting files/charts, user has to click on "Open" button as shown below. (If need to upload multiple files then Press Ctrl & select files together).

٩		File Uploa	d					×
€ 🤿 ▾ ↑ 퉱 ኑ T	est1				~ C	Search Test1		٩
Organize 👻 New fold	ler							0
🔺 🚖 Favorites	Name	Date modified	Туре	Size				
🔲 Desktop	Test1	9/20/2022 4:56 AM	Microsoft Word D	0 KB				
鷆 Downloads	Test2	9/20/2022 4:56 AM	Microsoft Word D	0 KB				
🔛 Recent places	Test3	9/20/2022 4:56 AM	Microsoft Word D	0 KB				
This PC Network								
Filen	name: "Test1" "Test2" "Test3"				~	All Files		~
						Open	Cancel	

- Here, user will be able to select any no. of files to upload but Provider Upload portal will take only 100 files to upload at a time. Hence, kindly select max 100 files to upload at a time when you click on "Select File" button.
- Once, 100 files have been uploaded, below screen pops up, user can again click on "Select File" button to select more files to upload if needs to be uploaded more than 100 files,
- Post uploading all the files, user can click on Generate Confirmation ID to generate receipt of the files which have been uploaded successfully.

Record Upload Details					
Advantmed Provider ID * (On Request Package)	1234567	<b>Comments</b> (0 /1000)			
File Password (If any)	۲		<i>li</i> .		
Drop files here					
Select File			Please select file(s) to upload.		
FileName	FileSize	Status	Action		
Test1.docx	0 kb	Success	Ċ.		
Test2.docx	0 kb	Success	Û		
Test3.docx	0 kb	Success	<b>0</b>		
			Generate Confirmation ID Rate Us 🏚 🕸		

**Note**: Except (.Exe) and (.DLL) all other frequently used file types are accepted for uploading charts. Such as pdf, tiff, xml, rtf, jpeg, png, zip, rar, dot, ftx, ftm, doc, etc.

Files/charts will be uploading as shown in below snap. Here, if user has uploaded any file/chart by mistake then user can remove that file/chart by clicking on the **Remove** button as shown in below snap before it is uploaded and if user wants to cancel all files then can click on **Cancel** button.

Record Upload Details		Tutorial Videos	Guidelines 📩		
Advantmed Provider ID * (On Request Package)	1234567	<b>Comments</b> (0/1000)			
File Password (If any)	۲		, iii.		
	Drop fi				
Select File					
Test1.docx (application/vnd.openxi Test2.docx (application/vnd.openxi Test3.docx (application/vnd.openx	nlformats-officedocument.wordproce mlformats-officedocument.wordproce mlformats-officedocument.wordproce				
uploaded 100 %					

Finally, the page will look as shown in below snap when all files/charts will be uploaded. Here also, if user wants to remove any file/chart then can simply click on the delete button in front of that file.

### Advantmed

Record Upload Details						
Advantmed Provider ID * (On Request Package)	1234567	Comments (0 /1000)				
File Password (If any)		۲	li.			
	Drop files here					
Select File			Please select file(s) to upload.			
FileName	FileSize	Status	Action			
Test1.docx	0 kb	Success	Ċ.			
Test2.docx	0 kb	Success	Û			
Test3.docx	0 kb	Success	<b>a</b>			
		Generate	e Confirmation ID 🛛 Rate Us 🏚 🏚			

If any file/(s) got failed to upload, status will be reflected as "Failed" as shown in below snap and user needs to re-upload those file/(s).

Record Upload Details				Tutorial Document	Guide
Advantmed Provider ID * (On Request Package)	1234567	<b>Comments</b> (0 /1000)			
File Password (If any)	۲				
Select File			Please select file(s) to upload.		
Please try again and re-upload belo	FileSize	Status	Action		
Test1.docx	0 kb	Success	¢		
Test2.docx	0 kb	Failed	Ċ.		
Test3.docx	0 kb	Success	۵		
		Ge	enerate Confirmation ID 🛛 Rate Us 🍁 🕸		

# Maximum number of files & maximum size of one single file which user can upload at a time

- User can upload maximum 100 files at a time and each file should not be more than 100 MB. Upon exceeding the limit, a pop up message will be reflected.
- Snap of Pop up message upon exceeding the number of files:





Snap of Pop up message upon exceeding the size limit of individual file:



**Note:** User may overcome this restriction by converting the file in Zip/Rar format but need to ensure that the size of Zip/Rar file does not exceed 100MB.

#### How to generate Confirmation ID?

 User can generate Confirmation ID by clicking on Generate Confirmation ID button as shown in below snap. This option will be available once uploading of charts/files is completed.

Record Upload Details		Tutorial Videos	Guidelines 🛓		
Advantmed Provider ID * (On Request Package)	1234567	Comments (0/1000)	8		
File Password (If any)	۲		ſ.		
	Drop fi				
Select File			Please select file(s) to upload.		
FileName	FileSize	Status	Action		
Test1.docx	0 kb	Success			
Test2.docx	0 kb	Success			
Test3.docx	0 kb	Success			
			Generate Confirmation ID Rate Us 🖈 🏚 🆈	l i i i	

### Advantmed

- A pop up will come up as shown below when user clicks on **Generate Confirmation ID** button. Here, user can generate Confirmation ID in two ways:
  - 1. By simply clicking on the **Download Confirmation Details** button:
    - a. User can download the confirmation receipt and save on his/her computer/laptop for future reference.
  - 2. By entering Email ID in the box & clicking on the **Yes** button:
    - a. User can send a copy of confirmation id on desired email id by inserting the email address and clicking as "Yes".

Download Confirmation Details 🚣
Confirmation Details on

• If user clicks on "**Download Confirmation Details**" button, then a receipt will be generated & pop up will come up as shown below.

Advantmad	^		Confirmation ID#220 Completed — 2.6 KB	09203815.htm	
Auvantmeu	0	Files Uploaded Sucessfully	Show all downloads		
		Confirmation ID# 2209203815	Download Confirmation Details 🛓		
Record Upload Details		Please Provide us an Email ID to Receive your email address.	Confirmation Details on	torial Videos	Guidelines 📥
Advantmed Provider ID * (On Request Package)	1234567	Email @			
File Password (If any)		Yes	No		
		Drop files here			

• When user opens that file, the receipt will open as shown below.

Confirmation ID #: 2209203815

#### Provider #: 1234567

Date & Time: 09/20/2022 5:26:41 AM PST File Count: 3

#No	File Name	Uploaded Status
1	Test1.docx	Success
2	Test2.docx	Failed
3	Test3.docx	Success

#### Thank You for uploading the Medical Records.

Please reach out to Advantmed at email id providerconnect@advantmed.com for any questions or query.

 If user enters Email ID & clicks on Yes button, a pop up will come up as shown below and an email will be sent on the Email ID mentioned in the Email box with Confirmation Receipt attachment.

Feedback:	
Your Opinion Mat your valuable feed	ters! Please Take a few seconds and share Iback with <b>"Advantmed"</b> .
	No, Thanks! Sure

• Email will look like as shown in below snap with Confirmation Receipt attached as highlighted.

no-reply@advantmed.com Confirmation ID#2209203815 For Provider ID- 1234567
This message was sent with high importance.
Confirmation ID#2209203815.htm _ 3 KB
Dear Physician / Office administrator,
Please find attachment of Confirmation ID#2209203815 For Provider ID- 1234567.
Thank You
Team Advantmed
Email ID: providerconnect@advantmed.com

• Upon clicking on the attachment, it will open up as shown in below snap:

Advant	med <b>O</b>	ition ID #: 2209203815
Provider #: 12345 Date & Time: 09/: File Count: 3	67 20/2022 5:26:41 AM PST	
#No	File Name	Uploaded Status
1	Test1.docx	Success
2	Test2.docx	Failed
3	Test3.docx	Success
<b>Thank You for u</b> Please reach out t	uploading the Medical Records. o Advantmed at email id <u>providerconnect@advantmed.com</u> for any questions or query.	

#### How to rate Advantmed services & provide suggestions?

- User can Rate Advantmed services in two ways as mentioned below:
  - By clicking on the "Sure" button as shown in below snap. This option will be available post generating and sending the confirmation receipt on his/her email id, system will prompt user to attempt survey feedback by clicking on "sure" button.



- II. By clicking on "**Rate Us**" button as shown in below snap.
- a. This option will be there as soon as user uploads records; user will see option/button as "Rate Us" and can click on this button to fill up survey form.

Record Upload Details				Tutorial Document	Guidelines 🛓
Advantmed Provider ID * (On Request Package)	1234567	Comments (0 /1000)			
File Password (If any)	۲		li.		
	Drop fil	es here			
Select File			Please select file(s) to upload.		
FileName	FileSize	Status	Action		
Test1.docx	0 kb	Success	鱼		
Test2.docx	0 kb	Success	۵		
Test3.docx	0 kb	Success	<b>a</b>		
			Generate Confirmation ID Rate Us 🏚 🏚		

Upon using any of above two ways, user will be redirected to a new tab. New tab will open up as shown below.

dvant	med (	)			Ad 1.	234657	eritor		
e'd love to	hear your fee	dback							
r Physician/	Office Administr	ator,							
r the past year, ontinuously im	Advantmed has re hprove our services	quested and receiv and to ensure your	ed medical records experience is posi	from your office. W tive. To serve you be	/e appreciate the ti atter we would like	me and efforts you to get your feedba	and your staff pro- ck on your most re	vided handling this cent experience wit	request. Our go th our represent
ow satisfied an	e you with the req	uest packet/ mem	ber list and the pr	ocess of sharing th	e packet/ email ?				
0	0	0	0	0	0	0	0	0	۲
8	8		•	•	•	•		-	
1	2	3	4	5	6	7	8	9	10
nare your fee	edback								
ow satisfied an	e you with Advant	med Representati	ve's ability to und	erstand and proces	s your request ?				
0	0	0	0	0	0	0	0	0	۲
8	8					•	0	-	<b></b>
1	2	3	4	5	6	7	8	9	10
nare your fee	dback								
ow would you	rate your overall i	etrieval experienc	e with Advantmed	12					
0	0	0	0	0	0	0	0	0	۲
8	8	8	-		<b>C</b>	•	$\odot$		<b></b>
1	2	3	4	5	6	7	8	9	10
nare your fee	dback								
you have any	additional sugges	tions that would i	mprove our servic	es and your experi	ence in the future	2			
nare your fee	dback								
			-		1				

**Note**: User might have to allow pop up on his/her browser security section since the survey form will open up in new tab/page in browser.

Here, users can write their feedback based on their experience and submit it by clicking on "**Submit**" button.

Advant	med (	2		Ad	Advantmed Provider ID*				
We'd love to	hear your fe	edback							
ar Physician/	Office Administr	ator,							
er the past year	Advantmed has re	quested and receiv	ed medical records	from your office. V	/e appreciate the ti	me and efforts you	and your staff pro	vided handling this	request. Our goal
continuously im	prove our services	and to ensure your	experience is posi	ove. to serve you of	ener, we would like	to get your reedua	ick on your most it	ecent expenence wi	in our representativ
fow satisfied an	e you with the rec	quest packet/ mem	ber list and the pr	ocess of sharing tr	e packet/ email ?		0		
	0	0	0	0	0	0	0	0	
1	2	3	4	5	6	7	8	9	10
hare your fee	dback								
low satisfied an	e you with Advan	tmed Representation	ve's ability to unde	erstand and proces	is your request 7				
0	0	0	0	0	0	0	0	0	۲
0	8	8	•	•		0	0	•	
1	2	3	4	5	6	7	8	9	10
hare your fee	dback								
ow would you	rate your overall	retrieval experienc	e with Advantmed	12					
0	0	0	0	0	0	0	0	0	۲
8	8		<b>e</b>	•			0	<b>C</b>	<b></b>
1	2	3	4	5	6	7	8	9	10
hare your fee	dback.								
o you have any	additional sugges	stions that would i	mprove our servic	es and your experi	ence in the future	a			
hare your fee	dback								
				Submit	Skip				

✤ After clicking on the "Submit" button, next pop up will come up as shown in below snap and user will be redirected to upload page upon clicking on "OK" button





#### What does Confirmation Receipt contain?

- Confirmation receipt contains below details:
  - 1. Provider ID (which could be referred as future reference for tracking)
  - 2. Confirmation ID
  - 3. Date & Time when files/charts were uploaded
  - 4. File Count
  - 5. List of files/charts uploaded
  - 6. Uploaded Status (If file/chart upload was Successful/Unsuccessful)
  - 7. "Thank You" message with email id given to reach out in case of any questions or query



# Thank You!