

# Provider Upload – Process Document

Prepared For: **Provider**

Prepared by:

**Advantmed Team**




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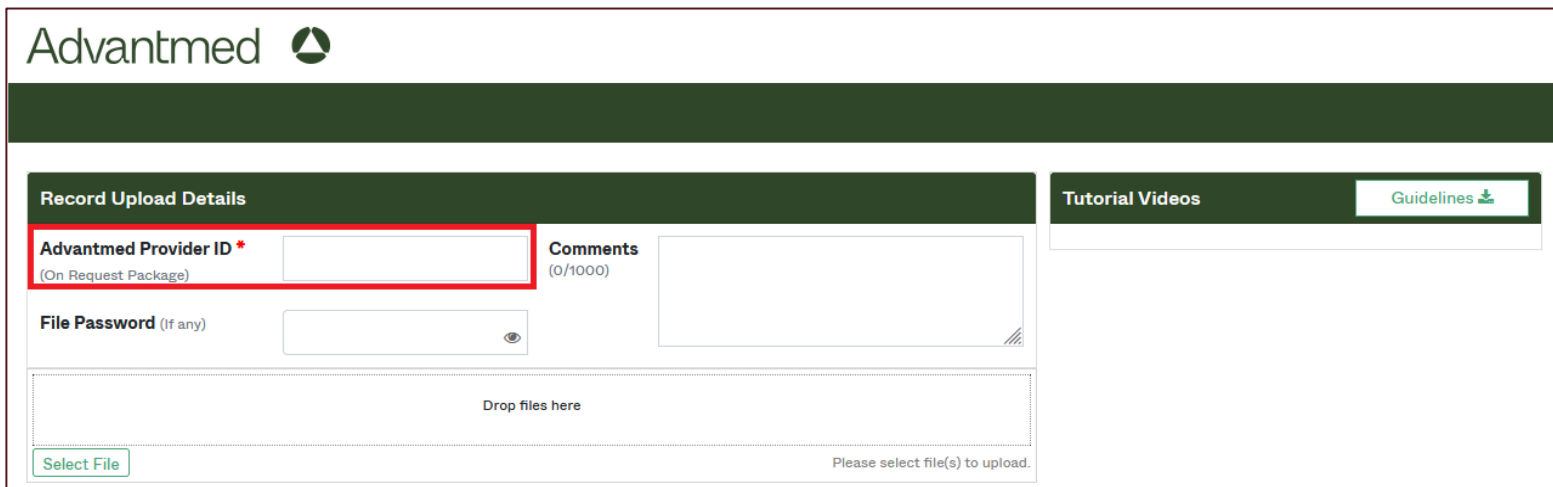
## How to Upload Charts?

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



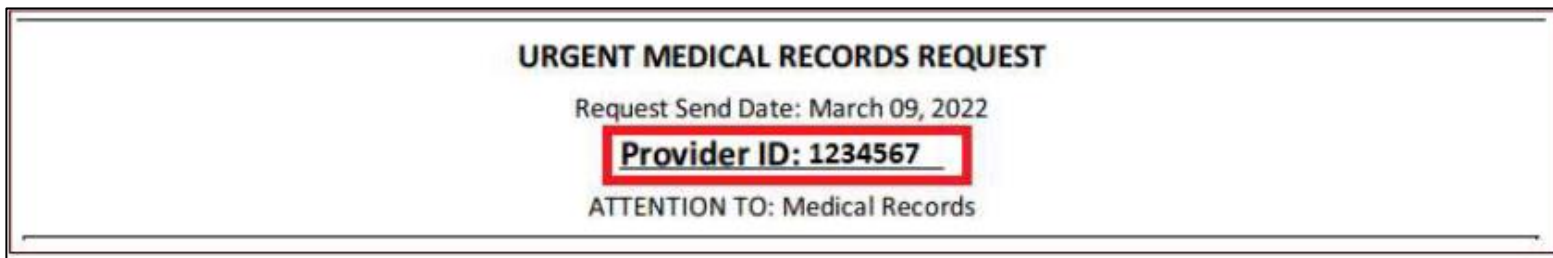
To upload records securely (in TIFF/PDF format) visit  
<http://www.advantmed.com/uploadrecords>  
 OR email records to our secure server at records@advantmed.com

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



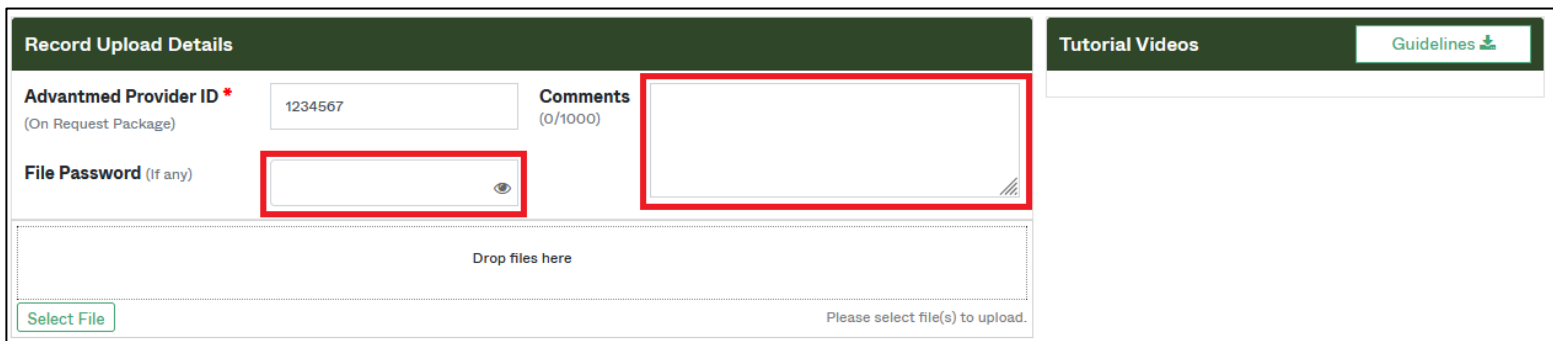
The screenshot shows the Advantmed Provider Upload page. The header includes the Advantmed logo. Below the header is a dark green navigation bar with 'Record Upload Details' and 'Tutorial Videos' (with a 'Guidelines' link). The main content area contains several fields: 'Advantmed Provider ID \*' (with a red box around it), 'File Password (if any)', 'Comments (0/1000)', and a file upload area with a 'Drop files here' instruction and a 'Select File' button. A 'Please select file(s) to upload.' message is visible at the bottom right of the file upload area.

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



The image shows the header of a fax packet. It features the text 'URGENT MEDICAL RECORDS REQUEST' in bold. Below this, it says 'Request Send Date: March 09, 2022'. The 'Provider ID: 1234567' is highlighted with a red box. At the bottom, it says 'ATTENTION TO: Medical Records'.

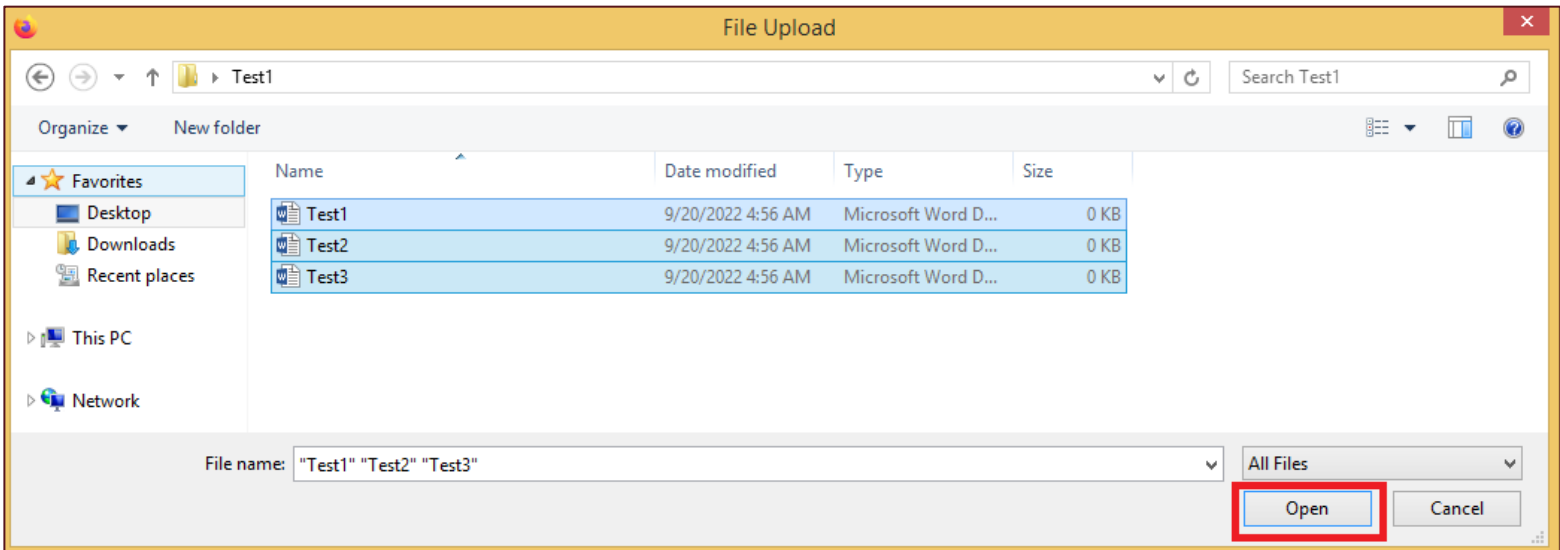
- ❖ User can also enter Password (password is required only when documents/records are password protected. If the file is not password protected, kindly leave this section empty) & Comments (if user wants to share any), in below highlighted fields.



This screenshot shows the Advantmed Provider Upload page with the 'Advantmed Provider ID' field filled with '1234567'. The 'File Password' and 'Comments' fields are highlighted with red boxes, indicating they are the focus of the instruction. The rest of the page layout is identical to the previous screenshot.

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

❖ 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).



- ❖ 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 \***  **Comments** (0 /1000)

**File Password** (If any)

Drop files here

[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   

### Tutorial Document

[Guidelines !\[\]\(a0eb3c6c24908e2ffb06a6e01c517ab5\_img.jpg\)](#)

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**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

**Advantmed Provider ID \***  **Comments** (0/1000)

**File Password** (If any)

Drop files here

[Select File](#) Uploading file: Test2.docx of size 0 Kb bytes.

**Test1.docx** (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - 0 Kb *(Uploaded)*

**Test2.docx** (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - 0 Kb *(Uploaded)*

**Test3.docx** (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - 0 Kb *(pending)*

Remove

Cancel

### Tutorial Videos

[Guidelines !\[\]\(a73d56bc849a881592cf01dab86c2353\_img.jpg\)](#)

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- ❖ 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.

### Record Upload Details




**Advantmed Provider ID \***  **Comments**




(On Request Package) (0 /1000)

**File Password** (If any)


Drop files here

[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](#)
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### Tutorial Document

[Guidelines](#) 

❖ 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

**Advantmed Provider ID \***  **Comments**




(On Request Package) (0 /1000)




**File Password** (If any)

Drop files here


[Select File](#) Please select file(s) to upload.

Please try again and re-upload below file/(s) which are failed.

FileName	FileSize	Status	Action
Test1.docx	0 kb	Success	
Test2.docx	0 kb	Failed	
Test3.docx	0 kb	Success	

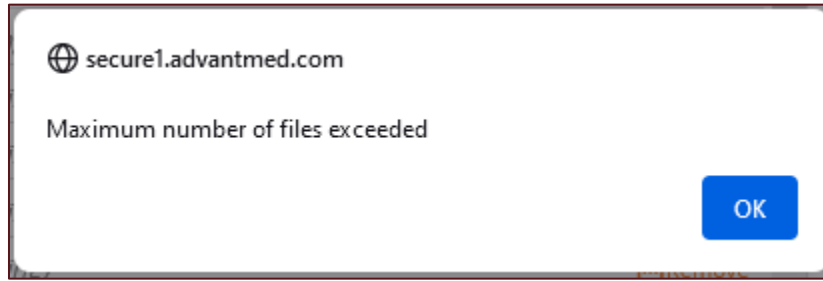
[Generate Confirmation ID](#)
[Rate Us](#)   

### Tutorial Document

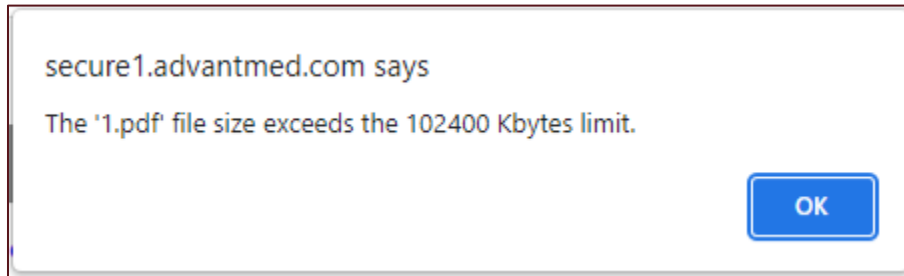
[Guidelines](#) 

## 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**

**Advantmed Provider ID \*** (On Request Package)  **Comments** (0/1000)


**File Password** (If any)

Drop files here

[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](#) ☆☆☆

**Tutorial Videos** [Guidelines](#) 

- ❖ 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”.

**Files Uploaded Successfully**

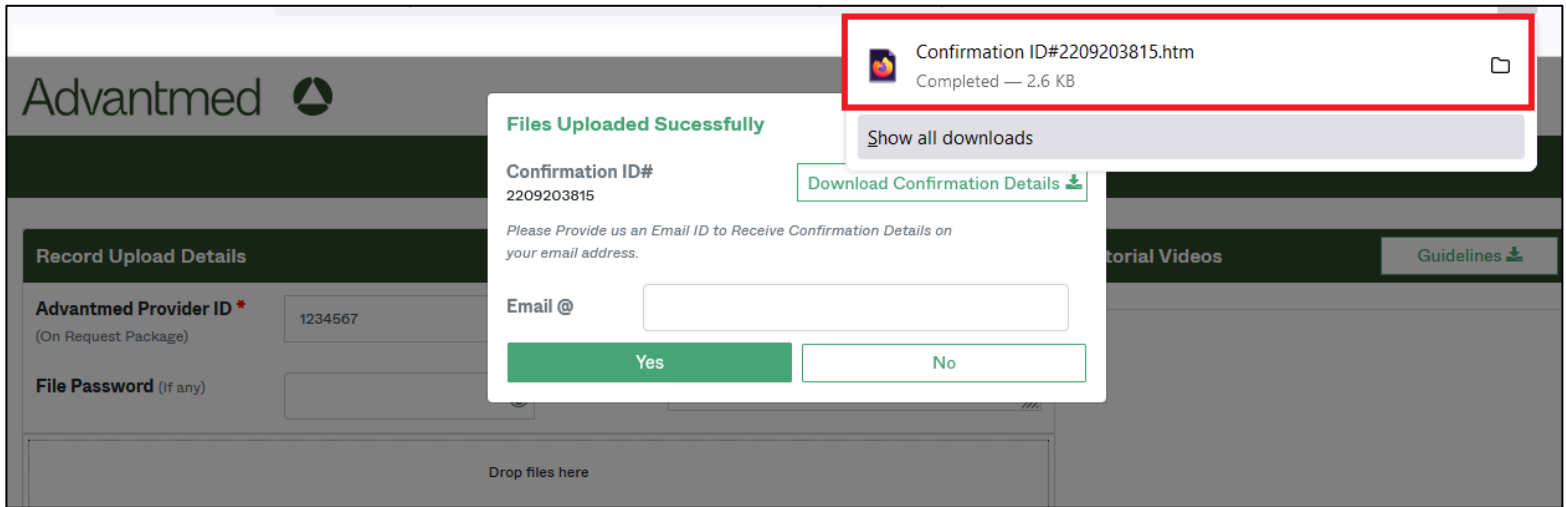
**Confirmation ID#**  
2209203815

[Download Confirmation Details](#) 

*Please Provide us an Email ID to Receive Confirmation Details on your email address.*

Email @

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



The screenshot shows the Advantmed interface with a 'Record Upload Details' section. A download notification is visible in the top right corner, indicating a file named 'Confirmation ID#2209203815.htm' has been completed (2.6 KB). A 'Files Uploaded Successfully' pop-up is centered on the screen, containing the same confirmation ID, a 'Download Confirmation Details' button, an email input field, and 'Yes'/'No' buttons.

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

Advantmed Confirmation ID #: 2209203815

**Provider #: 1234567**  
**Date & Time: 9/20/2022 5:26:41 AM PST**  
**File Count: 3**

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

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

Please reach out to Advantmed at email id [providersupport@advantmed.com](mailto:providersupport@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 Matters! Please Take a few seconds and share your valuable feedback with "Advantmed".

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

 Tue 9/20/2022 5:41 AM  
no-reply@advantmed.com  
Confirmation ID#2209203815 For Provider ID- 1234567

To

 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: [providersupport@advantmed.com](mailto:providersupport@advantmed.com)

- Upon clicking on the attachment, it will open up as shown in below snap.

Advantmed Confirmation ID #: 2209203815

**Provider #: 1234567**  
**Date & Time: 9/20/2022 5:26:41 AM PST**  
**File Count: 3**

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

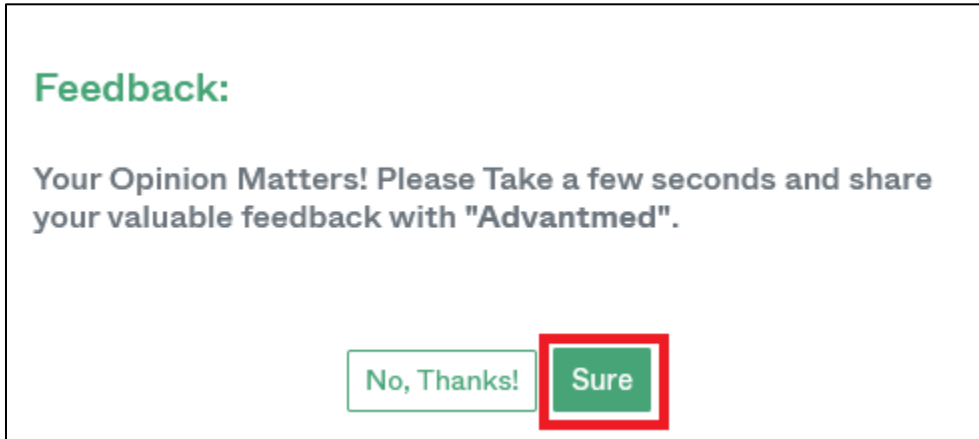
**Thank You for uploading the Medical Records.**

Please reach out to Advantmed at email id [providersupport@advantmed.com](mailto:providersupport@advantmed.com) for any questions or query.

## How to rate Advantmed services & provide suggestions?

❖ User can Rate Advantmed services in two ways as mentioned below:

- I. 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**

**Advantmed Provider ID \***  **Comments**

(On Request Package)

**File Password** (If any)

Drop files here

[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 ☆☆☆](#)

**Tutorial Document** [Guidelines](#)

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



We'd love to hear your feedback

Dear Physician/ Office Administrator,

Over the past year, Advantmed has requested and received medical records from your office. We appreciate the time and efforts you and your staff provided handling this request. Our goal is to continuously improve our services and to ensure your experience is positive. To serve you better, we would like to get your feedback on your most recent experience with our representatives.

» How satisfied are you with the request packet/ member list and the process of sharing the packet/ email ?

1 2 3 4 5 6 7 8 9 10

share your feedback

» How satisfied are you with Advantmed Call Center Representative's ability to understand and process your request ?

1 2 3 4 5 6 7 8 9 10

share your feedback

» How would you rate your overall retrieval experience with Advantmed?

1 2 3 4 5 6 7 8 9 10

share your feedback

» Do you have any additional suggestions that would improve our services and your experience in the future?

share your feedback

Submit Skip

**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.



We'd love to hear your feedback

Dear Physician/ Office Administrator,

Over the past year, Advantmed has requested and received medical records from your office. We appreciate the time and efforts you and your staff provided handling this request. Our goal is to continuously improve our services and to ensure your experience is positive. To serve you better, we would like to get your feedback on your most recent experience with our representatives.

» How satisfied are you with the request packet/ member list and the process of sharing the packet/ email ?

1 2 3 4 5 6 7 8 9 10

share your feedback

» How satisfied are you with Advantmed Call Center Representative's ability to understand and process your request ?

1 2 3 4 5 6 7 8 9 10

share your feedback

» How would you rate your overall retrieval experience with Advantmed?

1 2 3 4 5 6 7 8 9 10

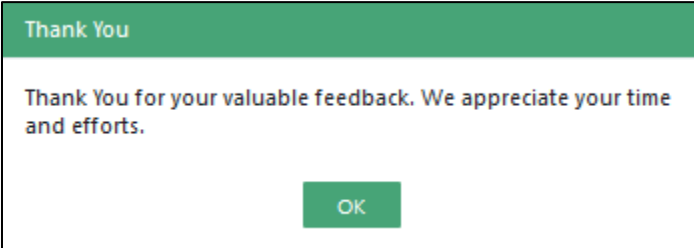
share your feedback

»Do you have any additional suggestions that would improve our services and your experience in the future?

share your feedback

**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!