

Uploading and Searching for Clinical Documentation in Connect

Uploading a Document for an Authorization Request

Documentation must be submitted for any prior authorization request that requires clinical review. Documents may include mental health assessments, chart notes, etc. If you are unsure whether your request requires clinical review, please see the [CareOregon Metro BH Utilization Management Handbook](#), [Jackson Care Connect BH Utilization Handbook](#) and [Columbia Pacific CCO BH Utilization Management Handbook](#) online.

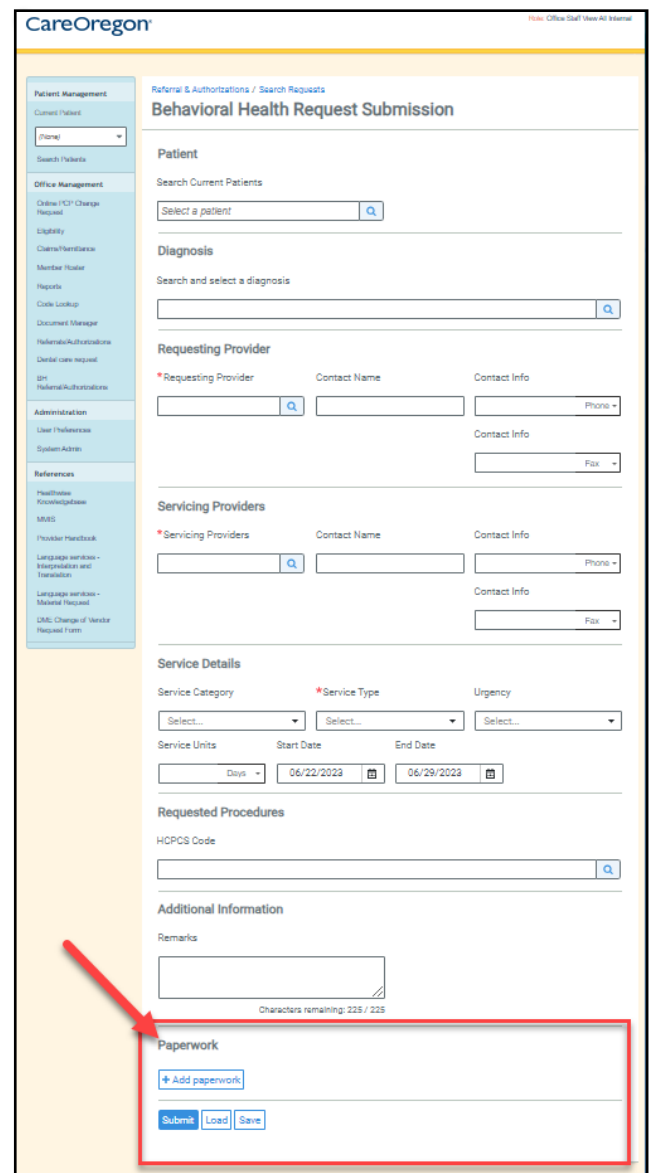
Or call CareOregon at (503) 416-4100 or 1 (800) 224-4840.

Documentation is attached at the bottom of the request page under the heading **“Paperwork.”**

Documentation must be uploaded/attached **prior** to submitting the request, as you will not be able to go back in later and attach documentation after a request has been submitted.

***Please note files are limited to:

- Around 500MB; and
- The following types: CSV, DOC, PDF, TXT, XML, and XLS.



The screenshot shows the 'Behavioral Health Request Submission' form in the CareOregon system. The form is divided into several sections: Patient, Diagnosis, Requesting Provider, Servicing Providers, Service Details, Requested Procedures, and Additional Information. At the bottom of the form, there is a section labeled 'Paperwork' which contains a button to '+ Add paperwork' and buttons for 'Submit', 'Load', and 'Save'. A red box highlights this 'Paperwork' section, and a red arrow points to it from the left side of the page.

Steps to attach documentation:

1. Click “+ Add Paperwork.”
2. The window will expand to allow you to enter the following:
***NOTE: Asterisks (*) denote required fields
 - a. ***Description:** this is a free text field. Enter a phrase that briefly describes the document (such as “Chart Notes” or “Mental Health Assessment”)
 - b. ***Report Type:** This field has no other options. Leave it as it appears, “Medical Record Attachment.”
 - c. ***Transmission Method:** This field has no other options, leave it as it appears, “Electronically Only.”
 - d. ***File:** Click the box, “Choose file to add.”

Paperwork

2

*Description A
Chart Notes

*Report Type B
Medical Record Attachment X

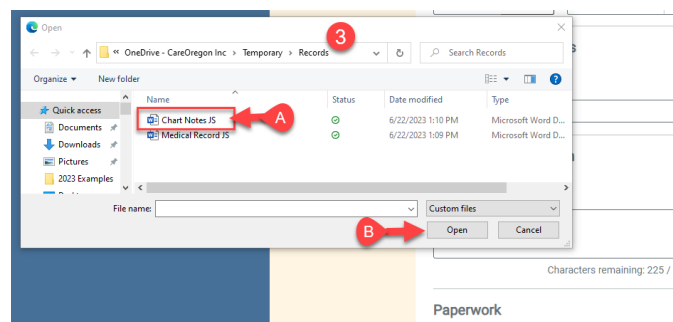
*Transmission Method C
Electronically Only X

*File D
Choose file to add

Delete

+ Add paperwork

3. Clicking “choose file to add” will open your file explorer:
 - a. Select the file you want to upload. You may upload more than one file, but each must be uploaded individually.
 - b. Click “Open.”



4. Verify that the file is attached:

Paperwork

*Description
Chart Note

*Report Type
Medical Record Attachment x

*Transmission Method
Electronically Only x

Chart Notes JS.docx x

+ Add paperwork

Submit Load Save

5. If you need to add additional documents, repeat the process above for each attachment, regardless of type. Every document must be uploaded separately.
6. Once you uploaded all necessary documents and your entire request is ready, click **“Submit.”**

If you forgot to attach clinical documentation

- You may fax clinical documentation into CareOregon at 503-416-4727
-- OR --
- You may resubmit the request via Connect
 - Add a statement in the comments, ***“Please disregard the previous request submission; did not include the clinicals/records. Please accept this submission with clinicals.”***

If you have uploaded a document previously, or if you are looking for a report that has been generated in Connect, use the **Document Manager** tab to search.

To search for a document in Document Manager:

1. Click on the “Document Manager” tab in the left-side navigation menu:

Home | [Log Out](#)
Logged In
[Message Center: 0 New](#)
Role: Office Staff View All Internal

CareOregon

Document Manager

My Documents [Add Document](#)

Current Documents Archived Documents

Document Search:

Search term: Category: Date Range: to
mm/dd/yyyy - mm/dd/yyyy

Owner: Status: Member:
[Search Members](#)

[Search](#) [Clear](#)

Sorted By: [Newest](#) Per Page: [25](#)

690060 2 Dental Treatment Procedure Detail PDF.pdf (2 KB) Uploaded: 06/22/2023

Owned By: CareOregon, Inc. (internal) Member: Expires: Does Not Expire

[View/Edit](#) [Download](#) [Archive](#) [Permanently Delete](#)

2. Determine if you are looking for a “Current” or “Archived” Document:
 - a. **Current Documents** - one that you generated or attached recently
 - b. **Archived Documents** - one that you have previously selected to archive

My Documents

Current Documents Archived Documents

Document Search:

Search term: Category:

3. Use the “Document Search” parameters to search for your document:
 - a. **Document Name:** Name the file was given when uploaded initially (free text)
 - b. **Category:** Many possible options. This function may not be preferred
 - c. **Date Range:** Date the document was uploaded/added to Connect
 - d. **Owner:** Who submitted the document (free text)
 - e. **Status:** Downloaded, received or uploaded
 - f. **Member:** Use the search option below this search box to search by member

My Documents

[Add Document](#)

Current Documents | Archived Documents

3 Document Search:

A Search term: **B** Category: **C** Date Range: to

D Owner: **E** Status: (Dropdown menu: Show All Statuses, Downloaded, Received, Uploaded)

4 [Clear](#) **F** Member:

4. Click “Search.”

5. Once you receive the results, you can sort them by the following parameters:
 - a. *Newest*
 - b. *Oldest*
 - c. *Document Name*
 - d. *Owner Name*

6. You can also choose how many results you want to display and how you would like them displayed:
 - a. *Number per page*
 - b. *View type*

Document Search:

Search term: Category: Date Range: to

Owner: Status: Member:

5 (Dropdown menu: Newest, Oldest, Document Name, Owner Name)

Sorted By: **6** (Dropdown menu: 25)

Member Roster by Access List_20230615-085506.csv (0 KB)	Uploaded: 06/15/2023
Owned By: CareOregon, Inc. (Internal)	Member: Kim Hubbell
Expires: Does Not Expire	

7. From the **Document Manager** you can perform the following:

- a. *View/Edit*
- b. *Download*
- c. *Archive a Document*
- d. *Permanently Delete*

Sorted By: **Newest** Per Page: **25**

Member Roster by Practice_20230615-092740.csv (186 KB) Uploaded: 06/15/2023

Owned By: Kim Hubbell Member: Expires: 2023-09-13

Uploaded Reports

View/Edit **Download** **Archive** **Snapshot View** **Permanently Delete**




Member Roster by Access List_20230615-085506.csv (0 KB) Uploaded: 06/15/2023

Owned By: Careoregon, Inc. Member: Expires: Does Not Expire

OR

Sorted By: **Newest** Per Page: **25**

Table View

Document Name	Uploaded	Member	Owned By	
Member Roster by Practice_2 0230615-092740.csv	06/15/2023		Kim Hubbell	  
Member Roster by Access List _20230615-085506.csv	06/15/2023		Careoregon, Inc. (internal)	