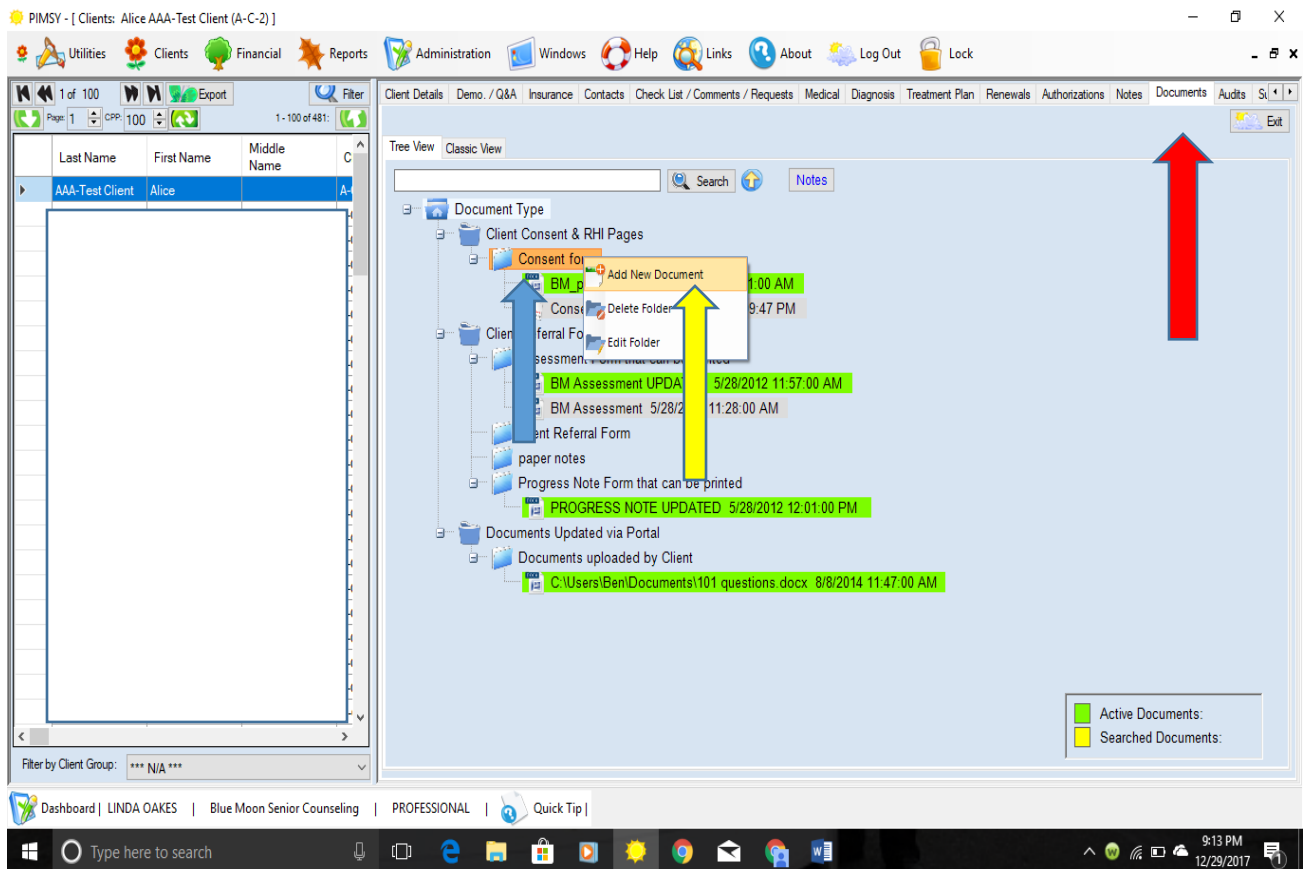


PC COMPUTER VERSION:



TO UPLOAD SCANNED DOCS INTO PIMSY:

Go to the DOCUMENTS tab in your client’s profile next to the NOTES tab. (RED ARROW)

Expand this page by clicking on the yellow arrow in the blue circle next to SEARCH and the SEARCH BAR.

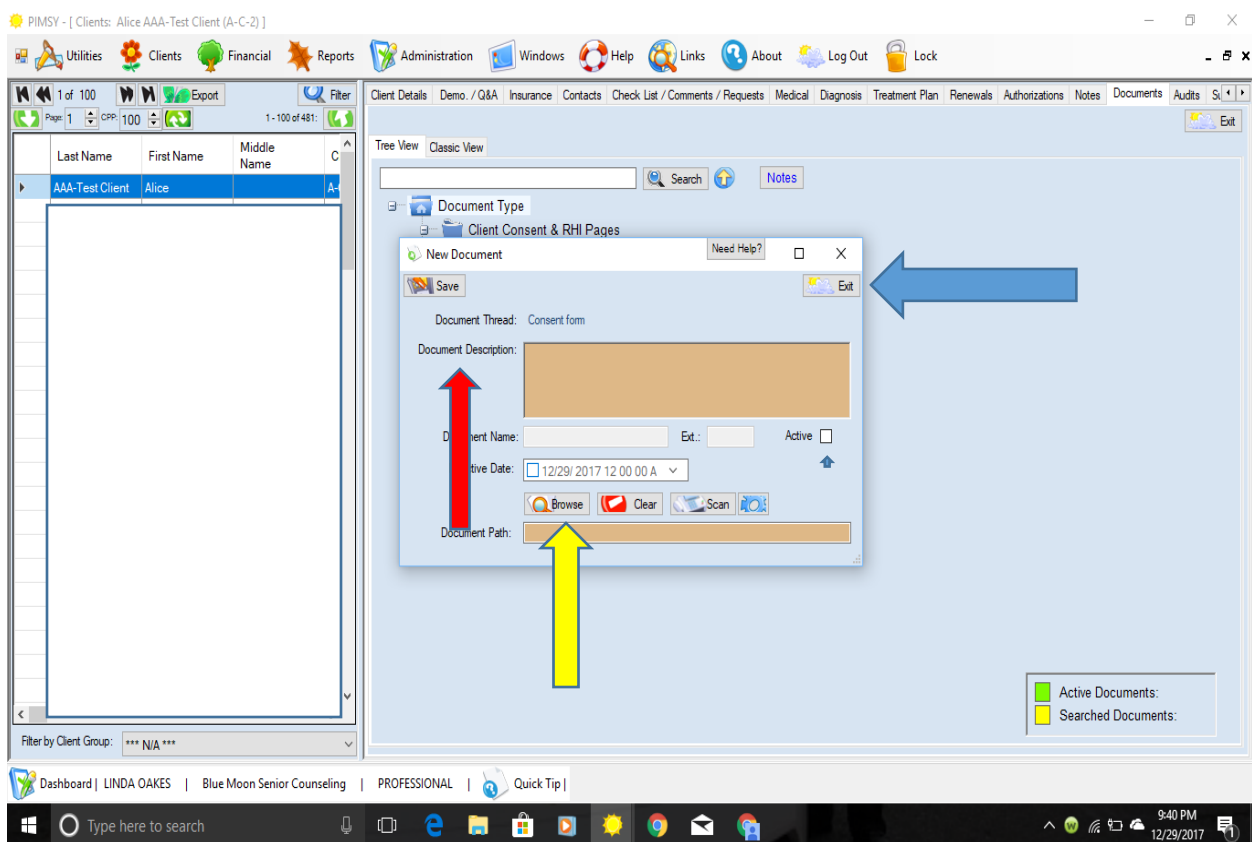
You will see CLIENT CONSENT & RHI PAGES. RIGHT CLICK on this line of text. (BLUE ARROW)

A small box will appear that has ADD NEW DOCUMENT as the first selection. (YELLOW ARROW)

LEFT CLICK on ADD NEW DOCUMENT.

You will then get a new template to actually browse (YELLOW ARROW) in your documents file in your computer where the consent/RHI/med list has been scanned and saved into. It is customary to put the client's first initial and last name in the search box as well as the name of the document you are going to save. (RED ARROW).

MED LISTS go under the sub-category of EXTRA DOCUMENTATION. The same steps apply there.

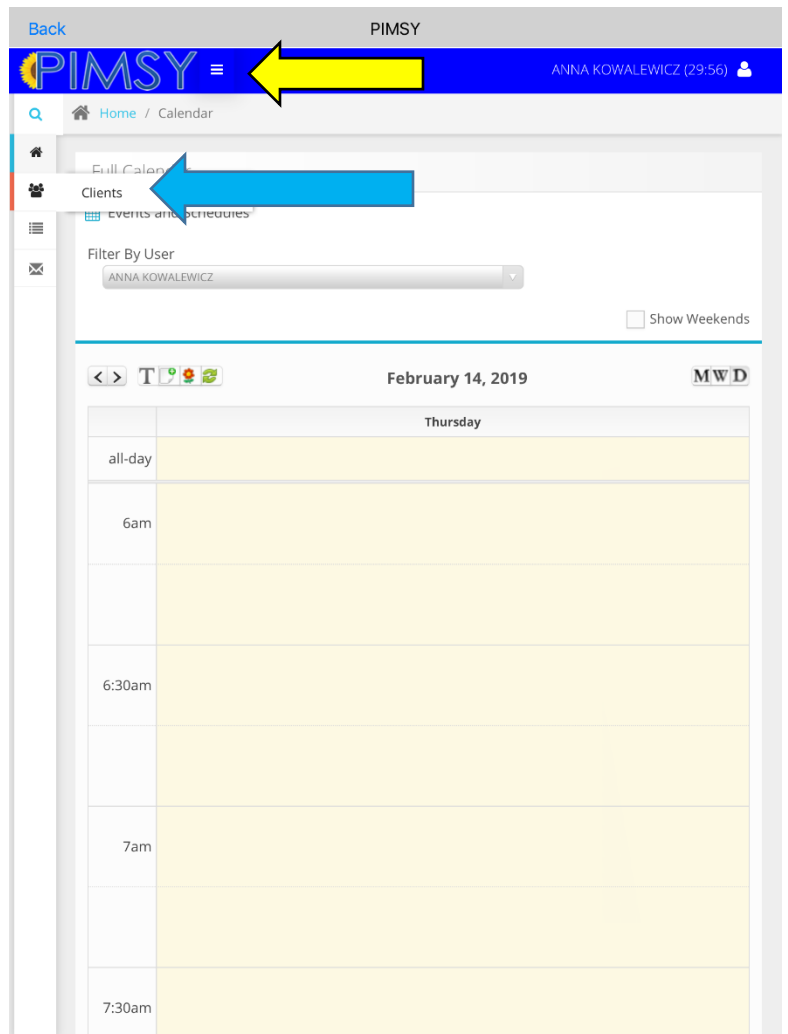


When you have selected the document, click OPEN and it will be on the NEW DOCUMENT small template. Click on SAVE and when it is done, just EXIT (BLUE ARROW) and the document will be on file.

APPLE/MAC COMPUTER & TABLET/PHONE APP

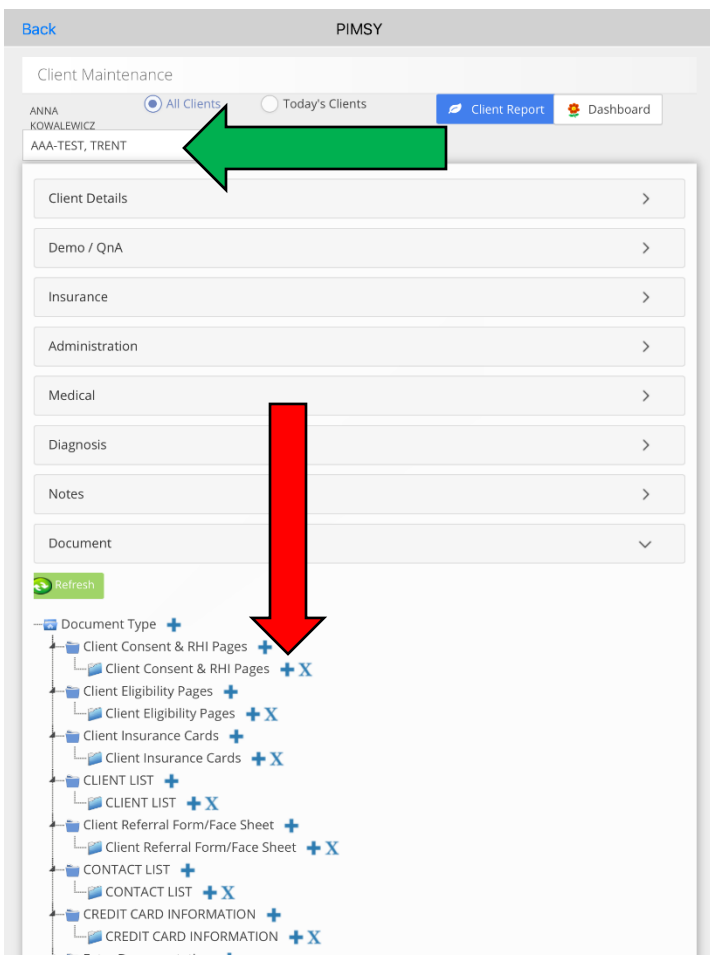
- The PIMSY app can be found in your phone's app store (**BOTH iPhones and Androids!**)
- The company's initials are **BMSC**

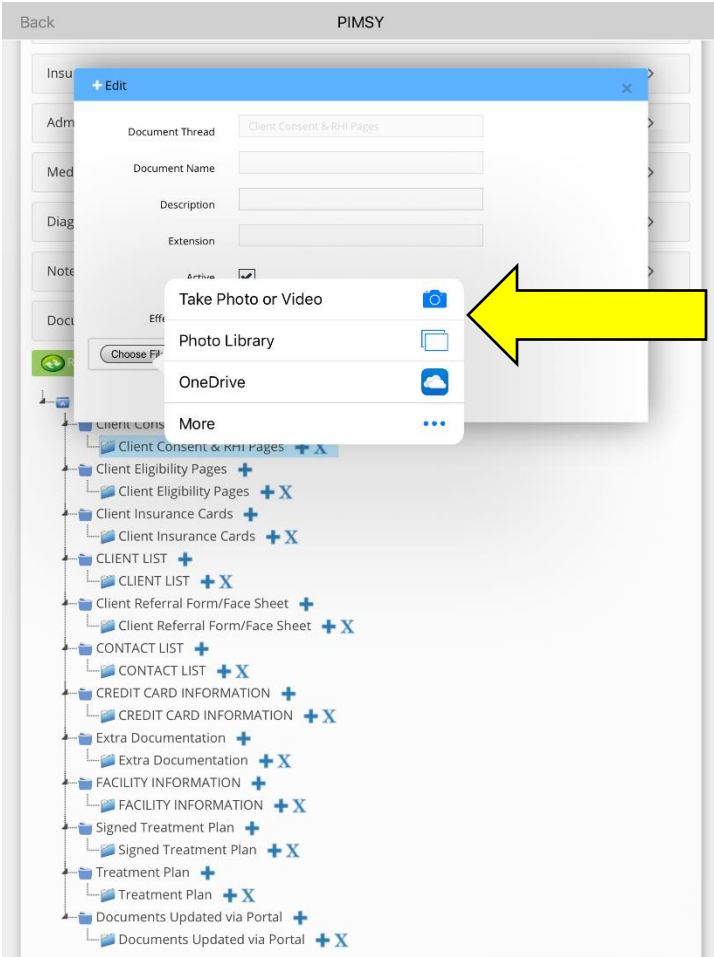
After logging in, you will need to access your client's profile. To do so, use the Menu (**YELLOW ARROW**) to get to your clients list (**BLUE ARROW**).



Find your client's name in the drop down to get to their profile (**GREEN ARROW**). On their profile, scroll down to the Documents Tab to find the Document Tree. You will see 2 folders for Client Consent & RHI pages. In the deeper one, there is a "+" and an "X." Select the "+" (**RED ARROW**) in that folder to add a document from your phone's photo gallery/library.

The same instructions apply for uploading the Medication List to the "Extra Documentation" Folder a few lines below in the Document Tree.





Either take a photo of the documents for upload (one at a time) or upload them if they are already in your photo gallery/library (YELLOW ARROW) and click "Save."

You will know your document uploaded successfully if it looks like the one pictured here! This method does not allow you to rename the document to have the client's name but that is okay!

**** PER THE CONTRACT, COMPLETE DELETION/SHREDDING OF PHOTOS/DOCUMENTS ARE NECESSARY FOR HIPAA COMPLIANCE. PLEASE VERIFY IT SUCCESSFULLY UPLOADED BEFORE DESTROYING THESE DOCUMENTS. ****

