

OLTL Enterprise Incident Management (EIM) Training

EIM System Changes – June 27, 2020
Document Upload

Agenda



DOCUMENT UPLOAD
HIGHLIGHTS



DOCUMENT UPLOAD
OVERVIEW



RESOURCES FOR
ASSISTANCE

Document Upload Functionality



Users are able to upload documents into EIM.



The Document Upload functionality becomes available as soon as the Incident is created. .



All users can upload documents until the Incident Final Section is submitted. Then users may only view documents that have been updated.



After Documents are selected from your Windows Explorer, you will need to select the 'Upload' button in order to upload the Document to EIM.



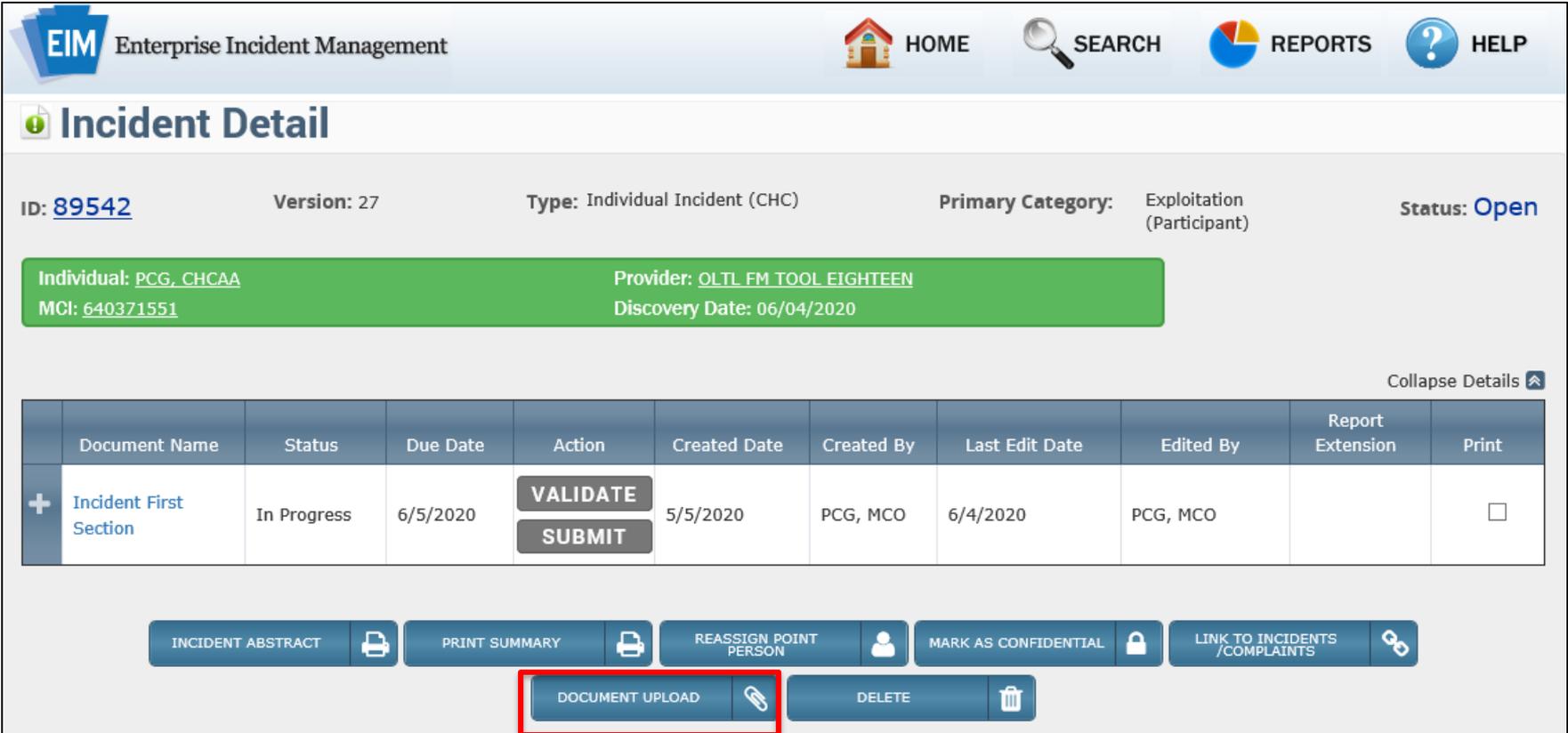
Reports or Print Summaries do not display the name of Documents that have been uploaded into EIM. You will only see those documents and the type of Document in the Document Upload screen.



Document Upload Functionality

Document Upload Functionality

The Document Upload Functionality is accessed from the Incident Detail screen.



EIM Enterprise Incident Management

HOME SEARCH REPORTS HELP

Incident Detail

ID: [89542](#) Version: 27 Type: Individual Incident (CHC) Primary Category: Exploitation (Participant) Status: **Open**

Individual: [PCG, CHCAA](#) Provider: [OLTL FM TOOL EIGHTEEN](#)
MCI: [640371551](#) Discovery Date: 06/04/2020

Collapse Details

| | Document Name | Status | Due Date | Action | Created Date | Created By | Last Edit Date | Edited By | Report Extension | Print |
|---|--|-------------|----------|----------------------------------|--------------|------------|----------------|-----------|------------------|--------------------------|
| + | Incident First Section | In Progress | 6/5/2020 | VALIDATE SUBMIT | 5/5/2020 | PCG, MCO | 6/4/2020 | PCG, MCO | | <input type="checkbox"/> |

INCIDENT ABSTRACT PRINT SUMMARY REASSIGN POINT PERSON MARK AS CONFIDENTIAL LINK TO INCIDENTS / COMPLAINTS

DOCUMENT UPLOAD DELETE

Document Upload

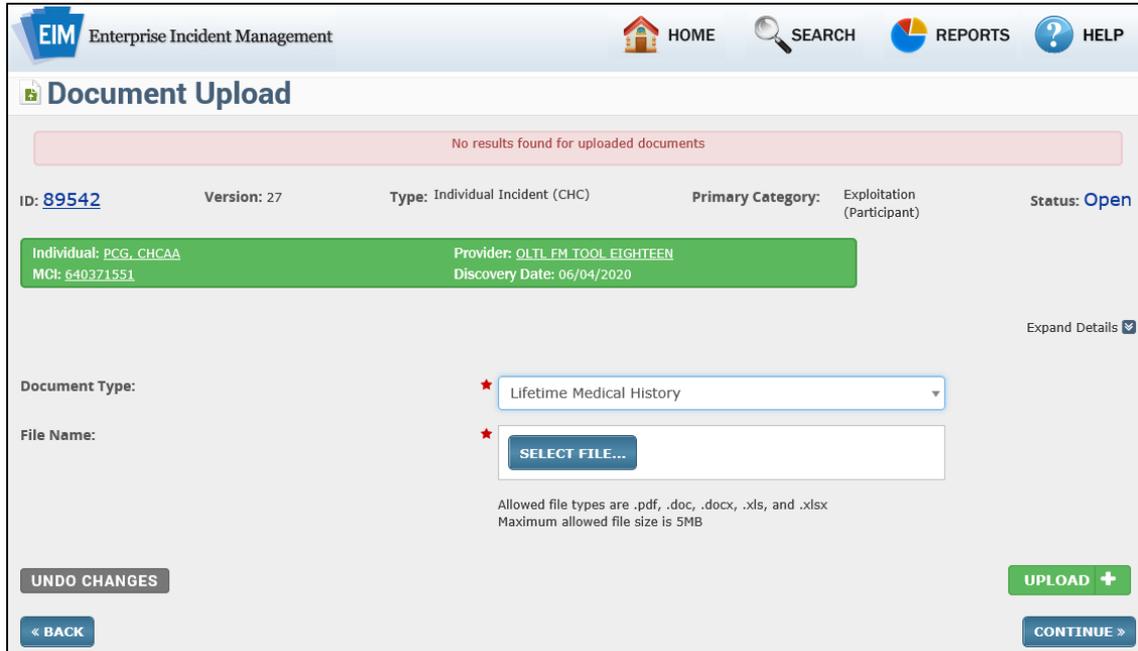
The Document Upload Functionality will allow users to attach documents to incident reports. Important features of this are:

- Documents can only be uploaded one at a time.
- Documents can only be uploaded until the Incident Final Section is submitted.
- The following formats are allowed to be uploaded:
 - PDF
 - DOC
 - DOCX
 - XLS
 - XLSX
- Documents cannot be larger than 5MB.
- Pictures MAY NOT be uploaded.
- The Document Upload Functionality is not available for incidents filed prior to June 27, 2020.
- The following users have the ability to delete documents:
 - Users who uploaded the Document
 - Users from the Reporting Organization
 - State Users



The following slides display the Document Upload screen and functionality.

Document Upload Functionality



The screenshot shows the 'Document Upload' interface in the Enterprise Incident Management (EIM) system. At the top, there is a navigation bar with 'HOME', 'SEARCH', 'REPORTS', and 'HELP' icons. Below the navigation bar, the page title 'Document Upload' is displayed. A red message box states 'No results found for uploaded documents'. The main content area shows incident details: ID: 89542, Version: 27, Type: Individual Incident (CHC), Primary Category: Exploitation (Participant), and Status: Open. A green bar contains individual and provider information: Individual: PCG_CHCAA, MCI: 640371551, Provider: QLT_EM_TOOL_EIGHTEEN, and Discovery Date: 06/04/2020. Below this, there is a 'Document Type' dropdown menu set to 'Lifetime Medical History' and a 'File Name' field with a 'SELECT FILE...' button. A note specifies allowed file types (.pdf, .doc, .docx, .xls, .xlsx) and a 5MB limit. At the bottom, there are buttons for 'UNDO CHANGES', 'UPLOAD +', '< BACK', and 'CONTINUE >'.

When the Document Upload screen is displayed for the first time the message, **No results found for uploaded documents**, is always displayed.

- First the user will select the **Document Type** they wish to upload from the dropdown.

Document Upload Functionality continued

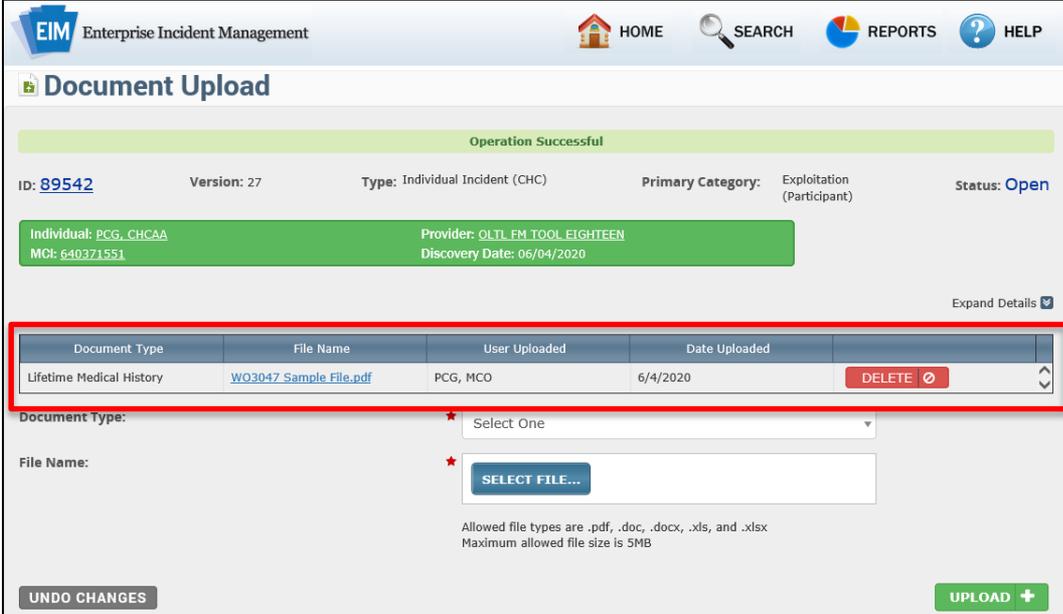


- Click **Select File**, and your Windows File Explorer will open.
- Select the File you wish to upload.
- The File will appear on the screen.
- You must click **Upload** to upload the document into EIM.

A screenshot of a web application interface for document upload. The interface is light gray with a white background for the main content area. On the left, there are two labels: "Document Type:" and "File Name:". To the right of "Document Type:" is a dropdown menu with a red star icon and the text "Lifetime Medical History". Below this, there is a file selection area with a red star icon, a blue "SELECT FILE..." button, and a "✓ Done" status. Below the selection area, a file named "WO3047 Sample File.pdf" is listed with a PDF icon and "3.54 MB" size. Below the file list, there is a note: "Allowed file types are .pdf, .doc, .docx, .xls, and .xlsx" and "Maximum allowed file size is 5MB". At the bottom left, there are two buttons: "UNDO CHANGES" (gray) and "<< BACK" (blue). At the bottom right, there are two buttons: "UPLOAD +" (green with a red border) and "CONTINUE >>" (blue).

Document Upload Functionality continued

- The uploaded document will appear in the table, as shown below.
- Continue these steps until all documents are uploaded.
- Documents may be uploaded until the Incident Final Section is submitted. Any uploaded documents can be viewed, but no additional documents can be uploaded.
- The Document Upload Functionality can be accessed again, if the Incident Final Section is returned.



EIM Enterprise Incident Management HOME SEARCH REPORTS HELP

Document Upload

Operation Successful

ID: [89542](#) Version: 27 Type: Individual Incident (CHC) Primary Category: Exploitation (Participant) Status: Open

Individual: [PCG_CHCAA](#) Provider: [OLTL_FM_TOOL_EIGHTEEN](#)
MCI: 640371551 Discovery Date: 06/04/2020

Expand Details

| Document Type | File Name | User Uploaded | Date Uploaded | |
|--------------------------|--|---------------|---------------|--------|
| Lifetime Medical History | W03047_Sample_File.pdf | PCG, MCO | 6/4/2020 | DELETE |

Document Type:

File Name:

Allowed file types are .pdf, .doc, .docx, .xls, and .xlsx
Maximum allowed file size is 5MB

UNDO CHANGES UPLOAD +

Sources for Help/Assistance

- Learning Management System (LMS)
- EIM Assistance Email account:
RA-OLTL_EIMimplement@pa.gov

