

# Magellan Healthcare of Idaho

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## Outcomes and Assessments System – Uploading a generic document

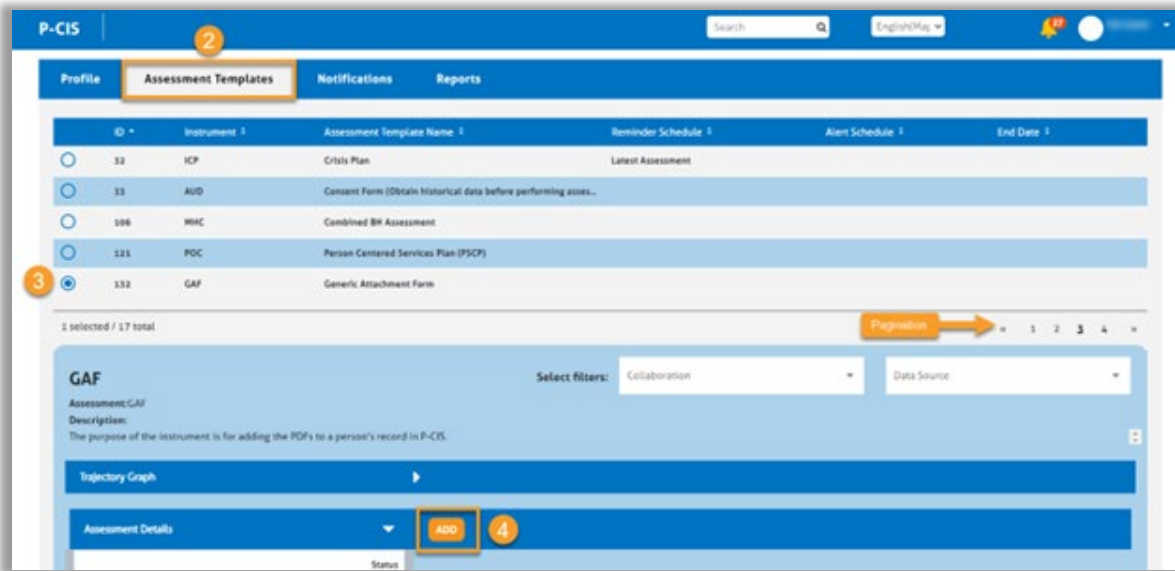
### Overview

One of the primary features of Magellan's outcomes and assessments system (accessed via Availity Essentials) is the coordinated ability to complete assessments. However, there may be times when a document needs to be uploaded, such as legal documents or Magellan deficiency letters. This step-by-step guide will provide guidance for how to upload a document to a member's record in Magellan's outcomes and assessments system.

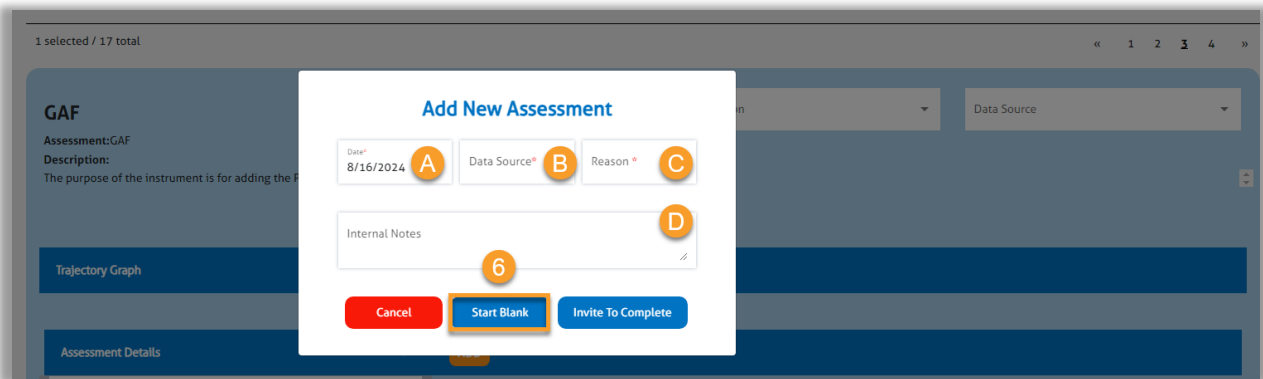
### Upload a Document

Some assessments within Magellan's outcomes and assessments system have an optional document attachment feature in order to upload supporting documentation, whereas others do not. The steps below will walk through how to upload a document to a member's record separate from a specific assessment.

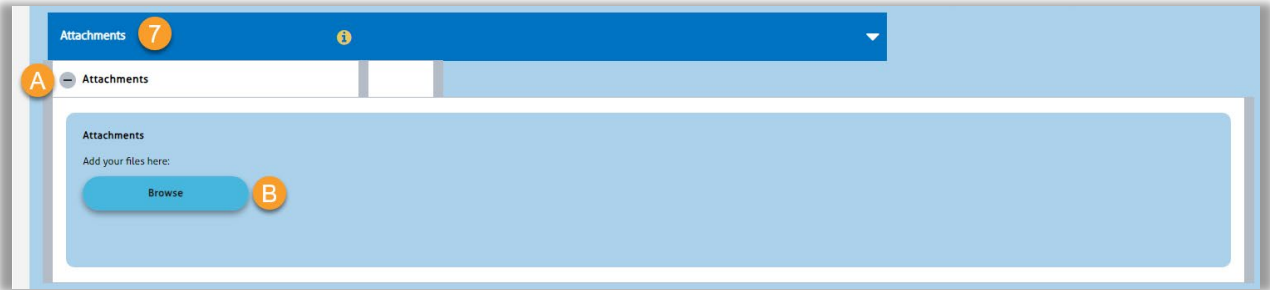
1. Locate the member in Magellan's outcomes and assessments system.
2. From the member's profile, click the **Assessment Templates** tab.
3. Select the radio button next to the **Generic Attachment Form** assessment.  
**NOTE:** The assessment may not appear on the first page of results. You may need to use the pagination on the bottom right to locate the Generic Attachment form assessment.
4. Once the assessment template opens, click the **ADD** button.



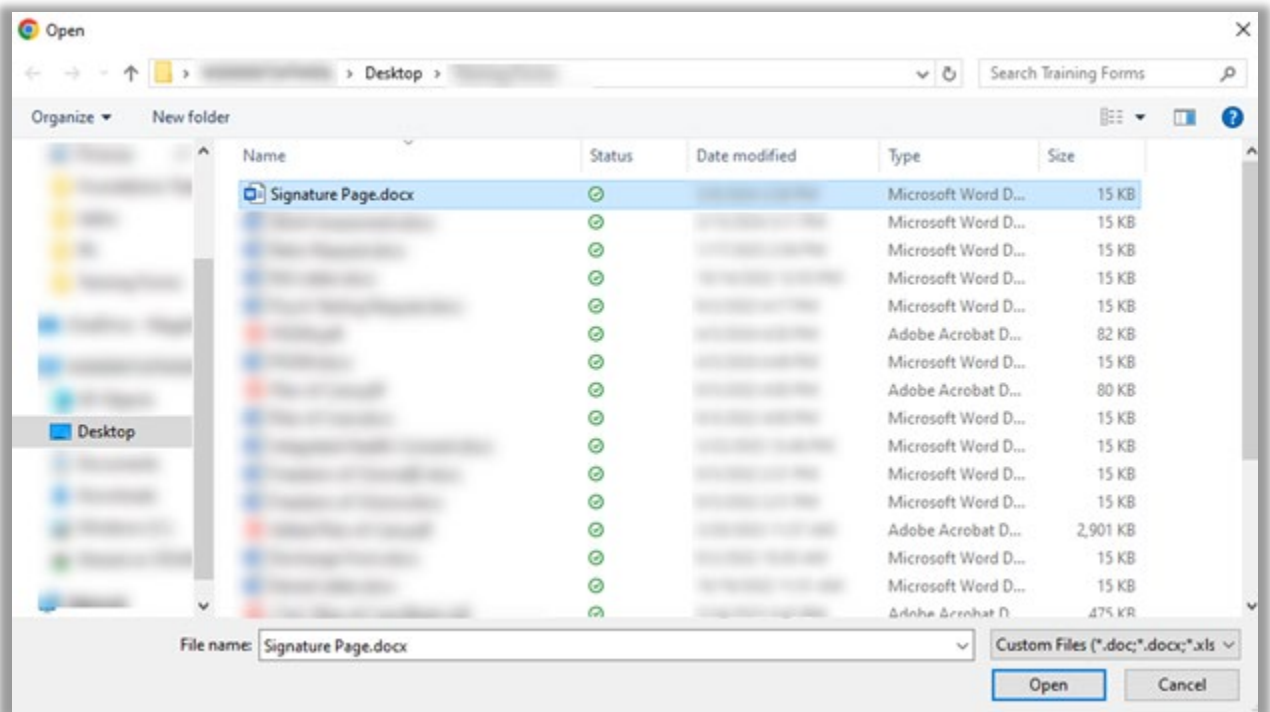
5. Complete the fields of the Add New Assessment screen.
  - A. **Date** – Auto populates to the **current date** and can be changed if needed to reflect when you are uploading the document.
  - B. **Data Source** – Select **Communimetric**.
  - C. **Reason** – Select the most appropriate from the drop down.
  - D. **Notes** – Optional and can be used to provide additional information as needed.
6. Click **Start Blank**.



7. Use the **Attachments** section to attach the document to the member's record.
  - A. Click the **(+)** next to the **Attachments** item.
  - B. Click **Browse**.



C. Locate the appropriate document on your computer and click **Open**.



8. Click **Save**.

9. Click **Submit & Approve**.

