Docman Unprocessed Documents

IMPORTANT NOTE: Before following this guide, you may wish to contact your local GPIT Delivery Partner to ensure that you have sufficient access rights for nominated practice staff to allow download of the Docman Duplicate Checker Tool, permissions to navigate to and save files into the Unprocessed folder held within the Docman programme structure on the Shared Drive.

If you use the hosted version of Vision, access has already been enabled for you and an icon for the Unprocessed folder is available on the Desktop in your Vision session.

Please contact your CCG if you are unsure which Delivery Partner you should contact.

Setting Up the Docman Tool to Identify Unique Documents

1. Download the Docman Duplicate Checker Tool from the following link and save locally (e.g. to your desktop)
   http://www.pctisolutions.co.uk/xml/DuplicateChecker.zip

2. Unzip the folder that has been downloaded (right click your mouse and select Extract All) and select to save the items local (e.g. to your desktop). There will be two files named DMBatchCleaner (with a blue icon) and DMBatchCLeaner.exe.config (with a white icon). See Fig.1 below



Fig.1

3. Navigate to your Unprocessed Folder *(EMIS practices should follow steps A-G below then skip to step I onwards. Vision practices should skip to step H and follow all remaining steps)*

   EMIS PRACTICES

   a. Go to 'My Computer'
   b. Go to the Shared drive that Docman is installed on. This is often on the N drive, as shown in Fig.2 below. *If you are not sure what drive contains the Docman files, please contact your local GPIT Delivery Partner.*

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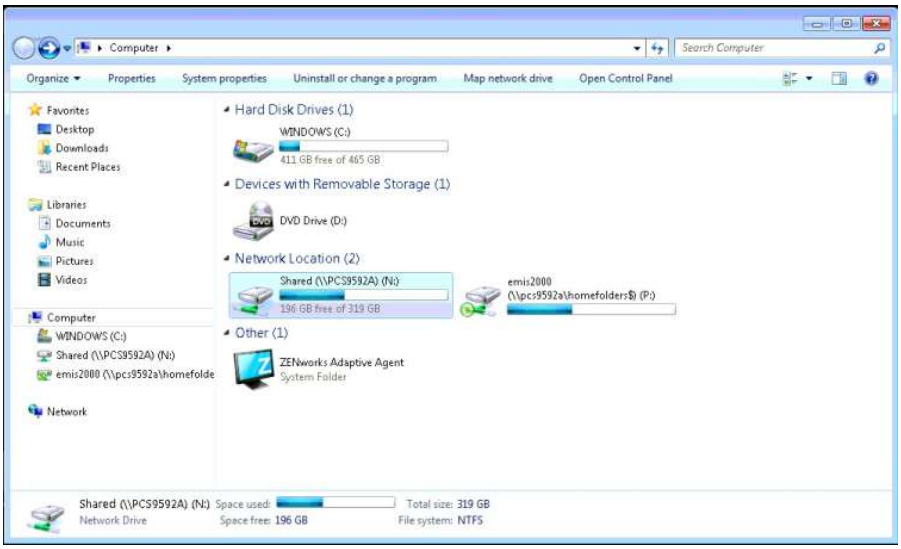


Fig.2

c. Open the PCTI folder, as shown in Fig.3 below

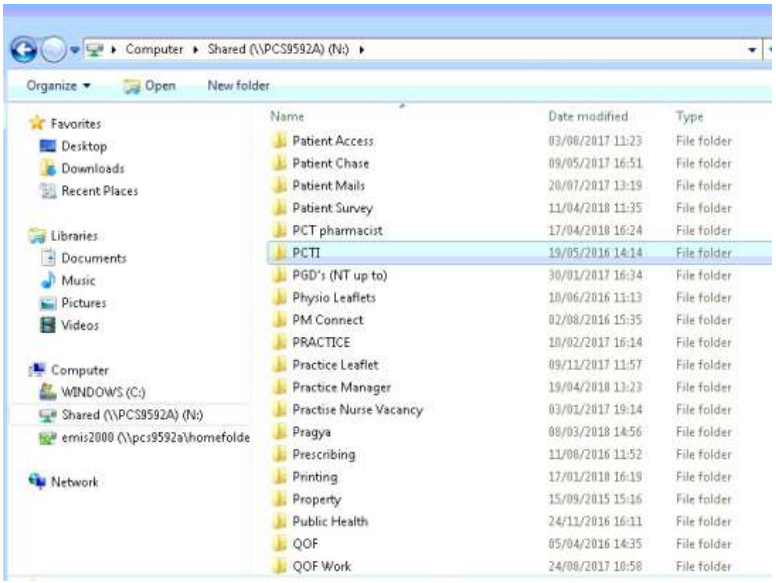


Fig.3

d. Once in the PCTI folder, open the DOCMAN7 folder, as shown in Fig.4 below

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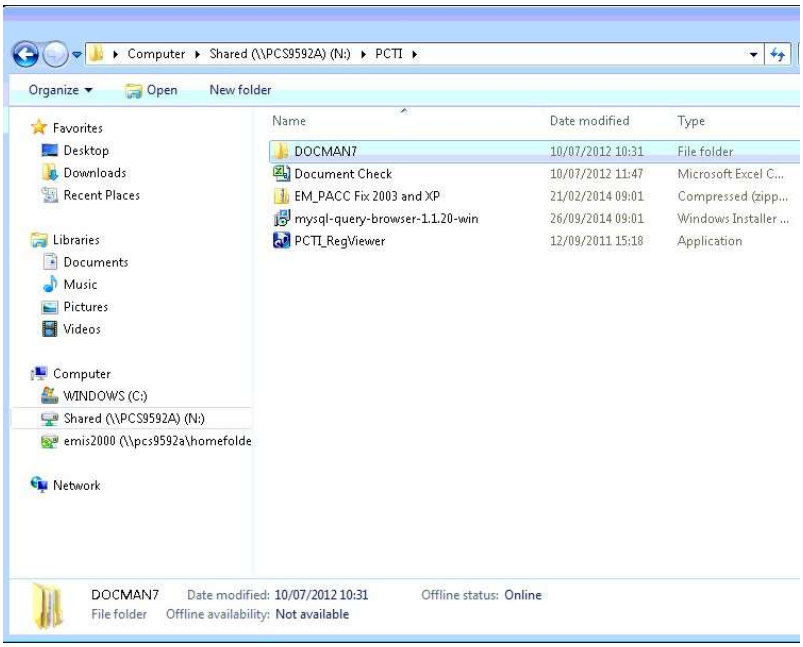


Fig.4

e. Once in the DOCMAN7 folder, open the DATA_S1 folder, as shown in Fig.5 below *IMPORTANT NOTE; If your practice has ever merged with another practice, or you operate as 'multi-site' you may also see folders named, for example, DATA_S2, DATA_S3 or DATA_S2 Merge. If so, you will need to complete all the remaining steps in this guide in each folder*

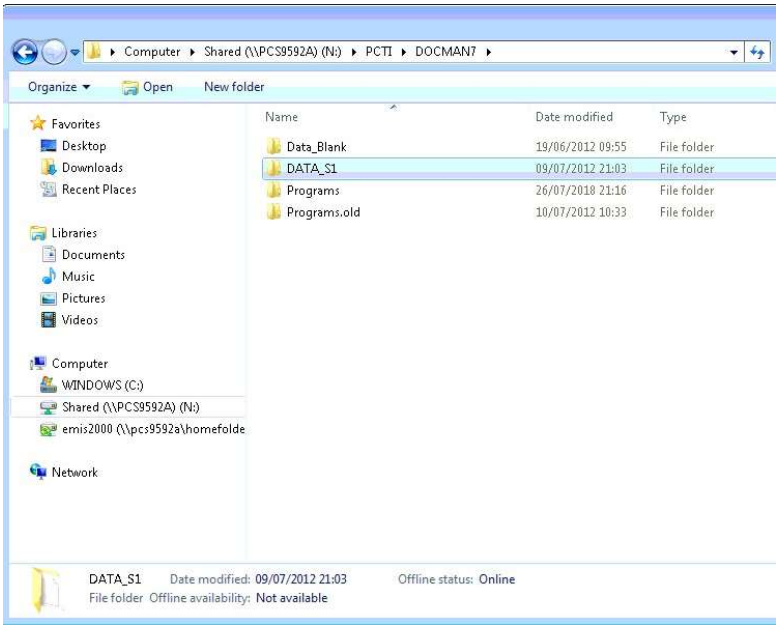


Fig.5

f. Once in the DATA_S1 folder, open the EDT folder, as shown in Fig.6 below

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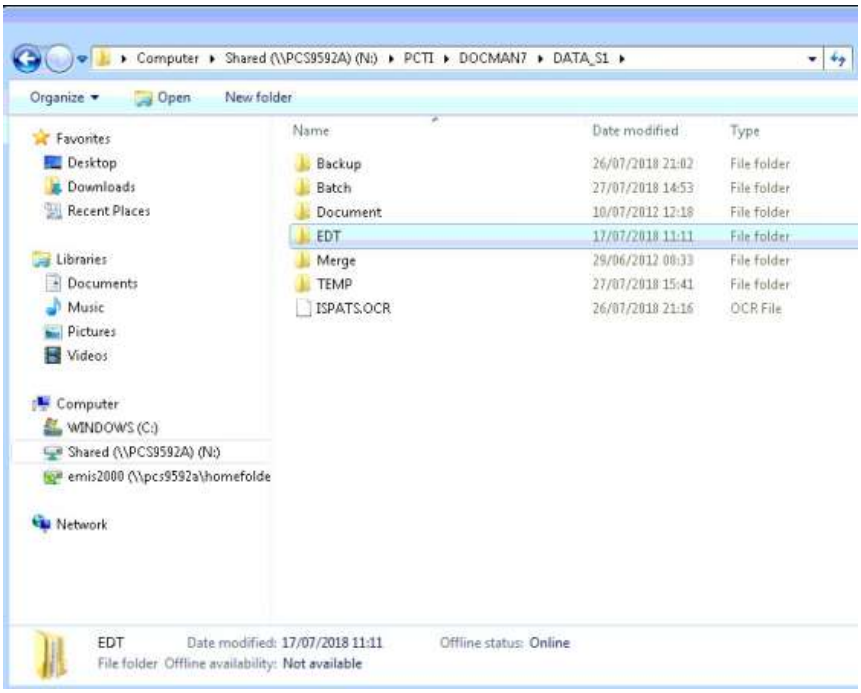


Fig.6

g. Once in the EDT folder, open the UNPROCESSED folder, as shown in Fig.7 below

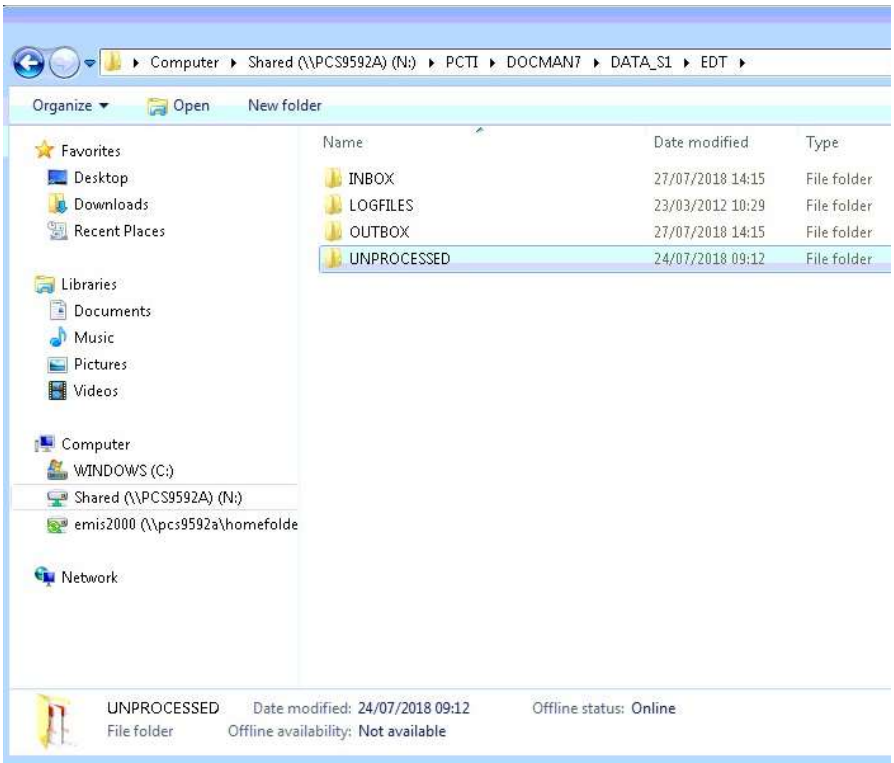


Fig.7

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h. Click on the Docman Unprocessed folder icon on the Vision desktop, as shown in Fig.8 below



Fig.8

i. Once in the UNPROCESSED folder you will see the list of documents it contains, as shown in Fig.9 below

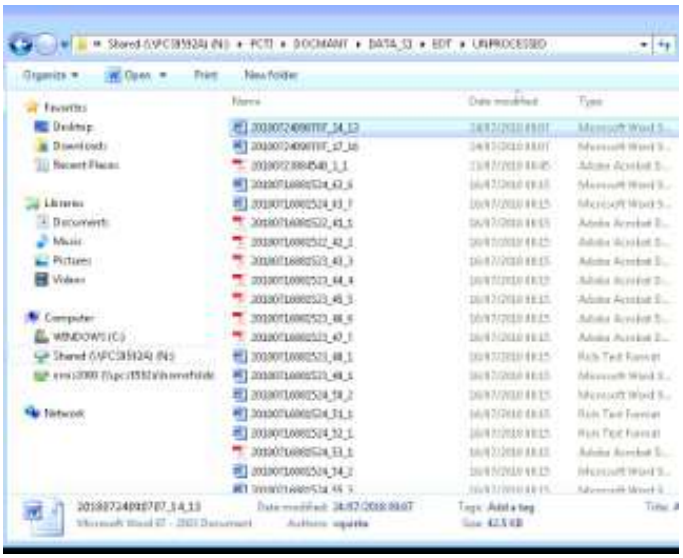


Fig.9

j. Copy and paste the two files you downloaded earlier, named DMBatchCleaner and DMBatchCLeaner.exe.config, to the UNPROCESSED folder as shown in Fig.10 below. *If you need assistance with this, please contact your local GPIT Delivery Partner (If you use the hosted version of Vision your permissions have been enabled to allow you to take this action).*

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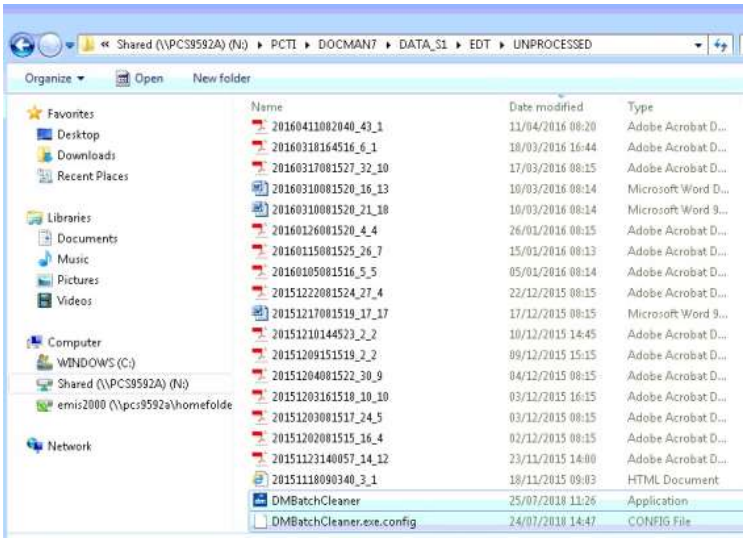


Fig.10

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Using the Docman Tool to Identify Unique Documents

4. Double click DMBatchCleaner with the blue icon. This will automatically start the tool running. Whilst it is working you will see a black window appear such as the one shown in Fig.11 below. The length of time this runs for will depend on the number of documents in the UNPROCESSED folder, however should take no longer than a few minutes. Please do not close the black window.

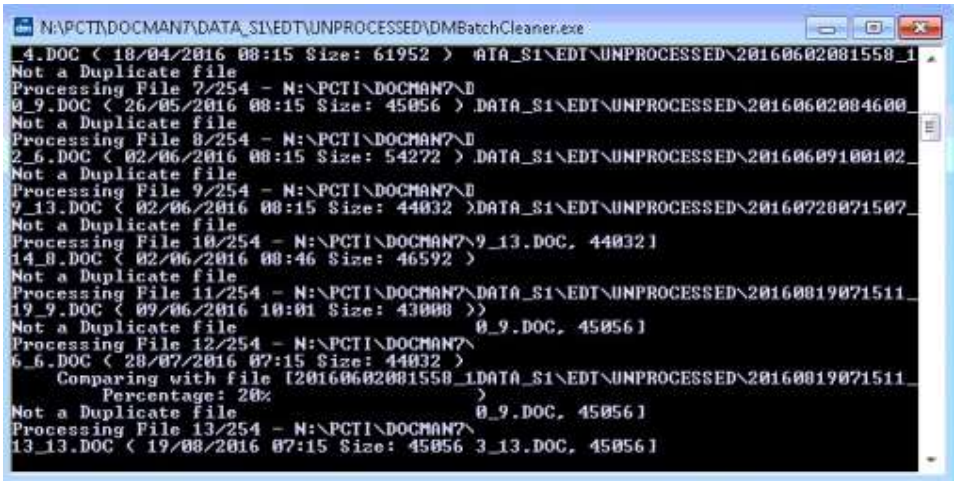


Fig.11

5. When the tool has completed its checks, a new folder called Moved folder will appear at the top or bottom of the list in the UNPROCESSED folder, see Fig.12. The Moved folder will contain all duplicate documents from the UNPROCESSED folder and you will be left with a list of unique documents. Please be aware that no documents have been deleted by the Docman Tool.

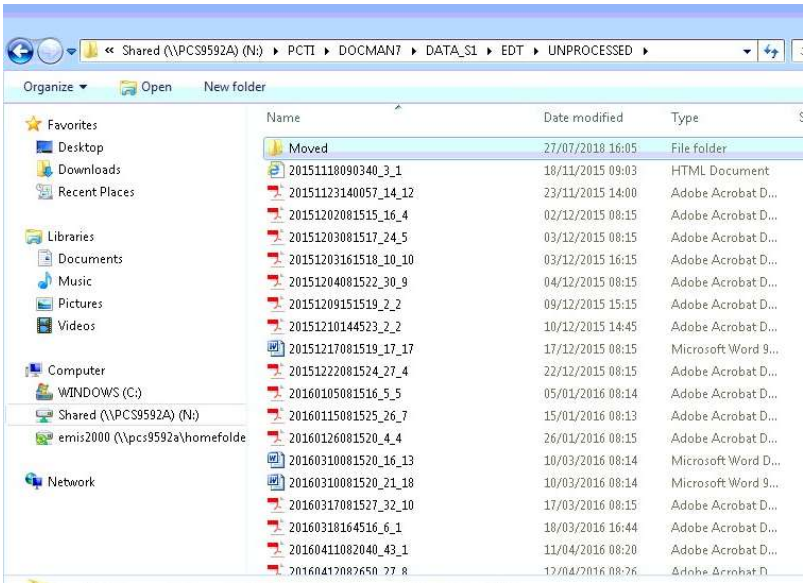


Fig.12

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Checking if the Unique Documents in the UNPROCESSED folder are Filed

6. You will need to open each document and make a note of any identifying information that will help you find this document in Docman. For example, you may wish to use the NHS Number and the Clinic Date.

7. Search for this document in Docman. We recommend using the Patient Search in Docman to bring up the list of documents filed to the patient you are looking for. *If you are unsure how to do search in Docman please refer to Appendix A.*

8. Confirm if the document can be found in Docman.
    a. If YES, it can be found in Docman, confirm if the document is also in the clinical system. *Note, you can use the Floating Toolbar to quickly navigate between the patient records in Docman and the clinical system. If you are unsure how to use the tool bar, please refer to Appendix A point 4*:
        i. If YES, the document can be found in the clinical system no further action is required.
        ii. If NO, the document cannot be found in the clinical system, please take the following actions:
            1. Review the document to understand if clinical filing is required. If an entry is needed, please edit filing details and select the option to file to the clinical system*. If you are unsure how to edit filing details in Docman please refer to Appendix B.*
            2. Undertake a risk assessment for each document to ensure appropriate clinical and non-clinical actions and recording of such has been completed. Please contact your CCG and follow the guidance provided. *We suggest that the workflow audit information may assist in confirming what actions have taken place. If you are unsure how to view the workflow audit information, please refer to Appendix C.*
    b. If NO, it cannot be found in Docman please take the following actions:
        i. Undertake a clinical risk assessment for each document. Please contact your CCG and follow the guidance provided.
        ii. File the documents to Docman and the clinical system, workflowing as appropriate. This will require the document to be printed, scanned and filed in Docman.

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Appendix A

Searching for Patient Documents in Docman

1. Select the 'Patients' button on the Docman Main Menu as shown in Fig.13



Fig.13

2. This will bring up a search window like the one shown in Fig.14. Type details of the patient in the free text box. This can be partial or full name, NHS Number or DOB. Highlight and click on record you wish to view.



Fig.14

3. Once in the patient record, the list of documents filed will be in the top half of the window, with a list of folders down the left-hand side. A preview of the document is shown in the lower half of the view. Please use these areas to look for a document matching the details taken earlier (e.g. clinic date). See Fig.15 for an example

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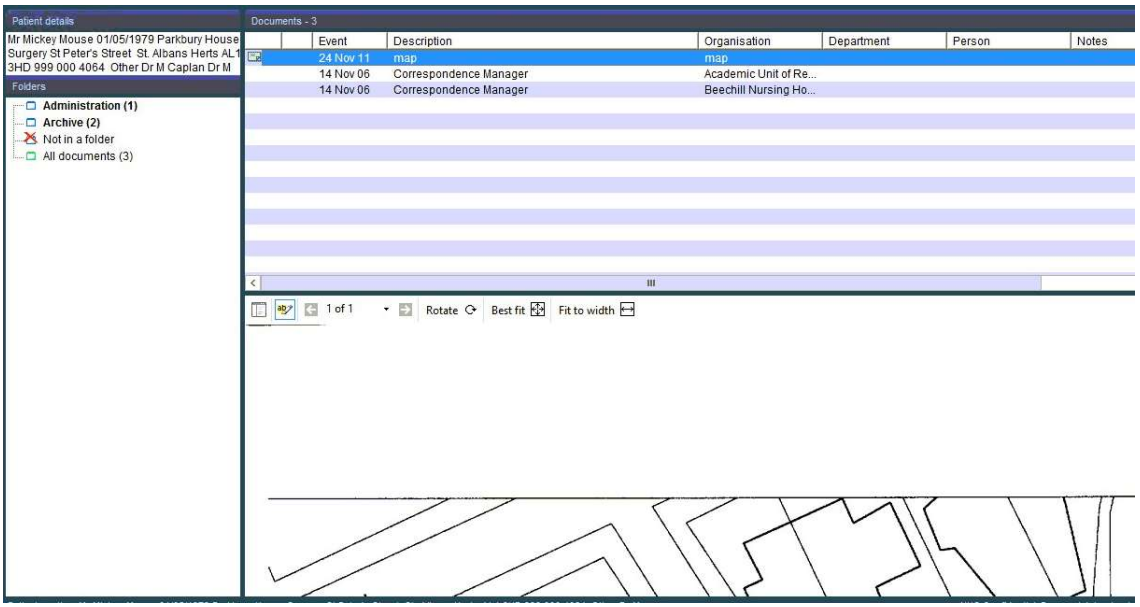


Fig.15

4. To switch quickly between documents in Docman and the clinical system you can use the Floating Toolbar function as shown is Fig.16 below.


Fig.16

Appendix B

Edit Filing Details in Docman

1. Right click your mouse on the document you wish to edit the filing details of. A screen like that shown in Fig.17 and Fig.18 will appear. From here you can change any of the information shown except for the patient details.

2. If the document is not filed to the clinical system, please ensure the option at the bottom right corner of the window is ticked.
    a) If you use EMIS this option will say 'File to EWEBAPI clinical system', as shown in Fig.17.

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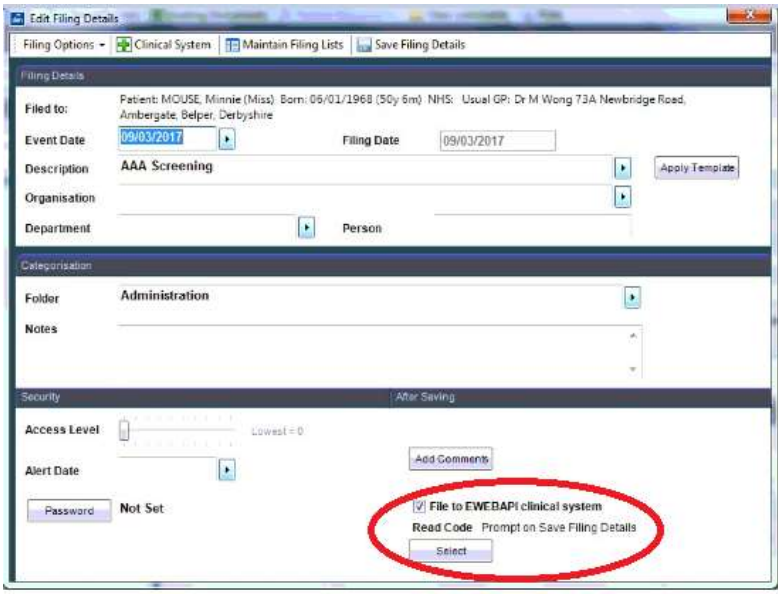


Fig.17

b) If you use VISION this option will say 'File to VISION clinical system', as shown in Fig.18.

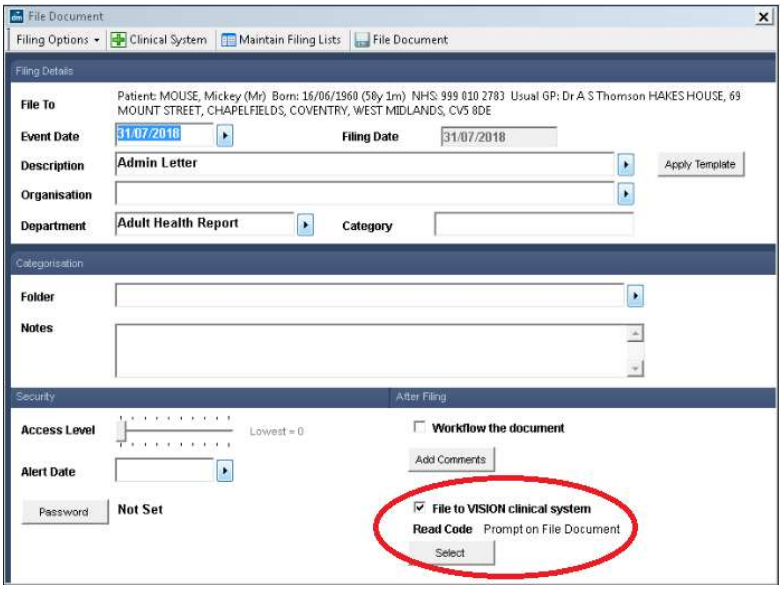


Fig.18

Appendix C

Reviewing Workflow Audit Details in Docman

1. From the list of patient documents (Fig.15), right click your mouse on the document you wish to view the workflow audit of. A screen like that shown in Fig.19 will appear

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detailing actions taken during the workflowing of this document, including date and time. If the workflow has been completed this will be shown.

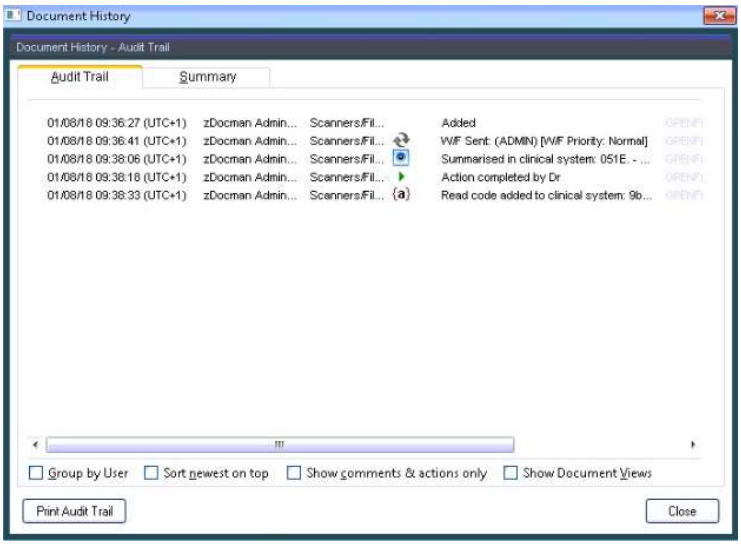


Fig.19

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