

## 2. Capture & Filing Tasks

### *Scanning and Filing staff*

#### Scenario

*During these tasks, you will file documents. You can then send them for review (previously Workflow) or file directly to the patients record.*

*NB: Intellisense will be available on all instances of Docman 10 for the benefit of all users.*

#### Task

- From the Home screen, click on Filing in the blue bar – This takes you to the Capture & Filing screen (You can assume that the documents here have been scanned in already, hence the document name Scan. Or received via EDT)

Working process in Docman 10 is left to right on all screens. On the left, select a document called Scan in your folder (Relevant to your practice), this will display the document in the preview screen, (middle part), and any actions will be subsequently displayed on the right-hand side.

- File Document. The document will now be 'read' by Intellisense and will then display its findings on the right. Review these, correct where necessary – Using the green [i] option as per the prompt at the top of the screen. Or manually typing the item in the relevant field, this will prompt a picking list of items, or you can add your own entry in the fields as required.
- Below the filing details checked on the right-hand side you will see Create Review. Choose to 'Start Review immediately after filing', click Save.
- On the next screen, you will be prompted to 'Add Reviewers'. Choose the Clinical user (Relevant to your practice), Click Start.

*NB. If a document does not need to be sent to a user for review, you can choose 'no review required' which will simply file the document to the patients record in the clinical system and Docman.*

#### Repeat

*Now, do this with 6 more documents, sending 5 to your chosen clinical user and file 1 more without sending for a review.*

#### Outcome

You should now be confident to file a document and send for review by the time you have completed this process 6 times.

**NB. Due to the nature of the familiarisation environment users may witness more duplicate document messages than they would expect in their live environment.**