

Familiarisation of Docman 10

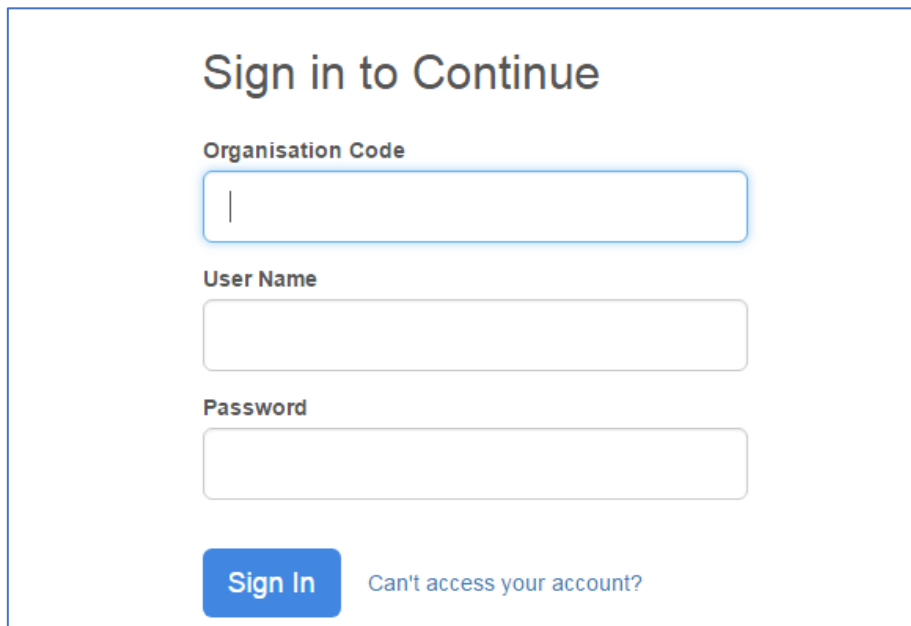
Docman 10 is a centrally hosted accredited solution. For the purpose of familiarisation a Web URL will need to be used by your Practice.

Docman 10 has been accredited for use with browsers Windows IE11, Google Chrome or Mozilla Firefox.

To access your familiarisation application please follow the URL and instructions below:

<https://login.docman.thirdparty.nhs.uk>

This should then present the following screen:



Sign in to Continue

Organisation Code

User Name

Password

Sign In [Can't access your account?](#)

To access the familiarisation application all the log in details will be sent under separate cover.

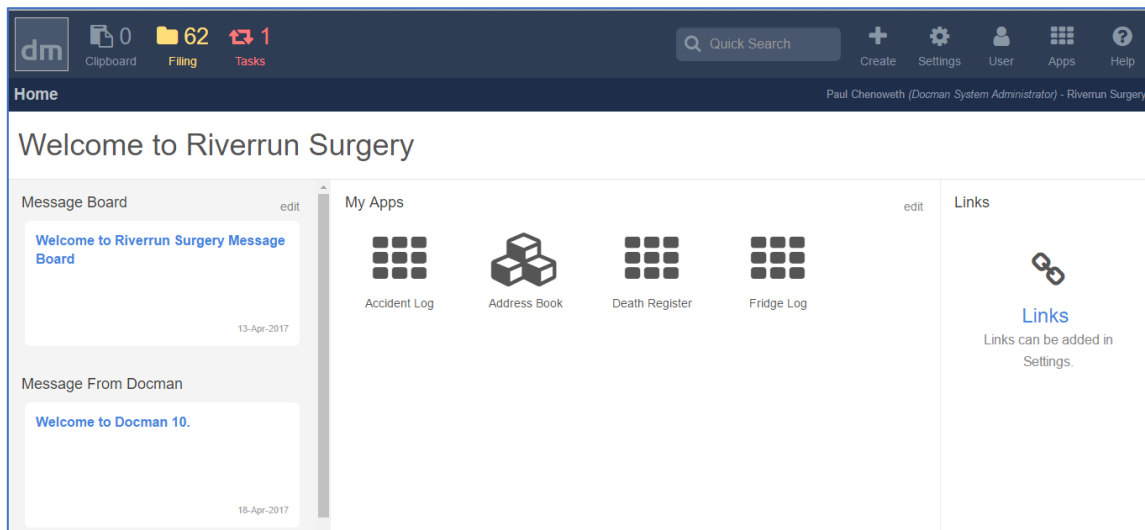
You will be given a number based GP reference to log in. There will be folders of documents, Tasks, etc numbered 01-99. Please maintain all your activities under the allocated GP number to save any confusion by any other users accessing the environment at the same time as yourselves.

The information below is intended to give you an introduction to Docman 10. Further detailed information can be found on the Docman Help website, a link can be found from the home screen of Docman 10.

Docman 10 is a web-based application, and as such allows users to utilise some browser functions.

- The forward/back arrows will take the user back & forth through Docman.
- F11 maximises the webpage, and will allow a more immersive experience for users
- The mouse will activate areas of the page simply by hovering over the fields
- Single Click operation for most functions increases response and handling times

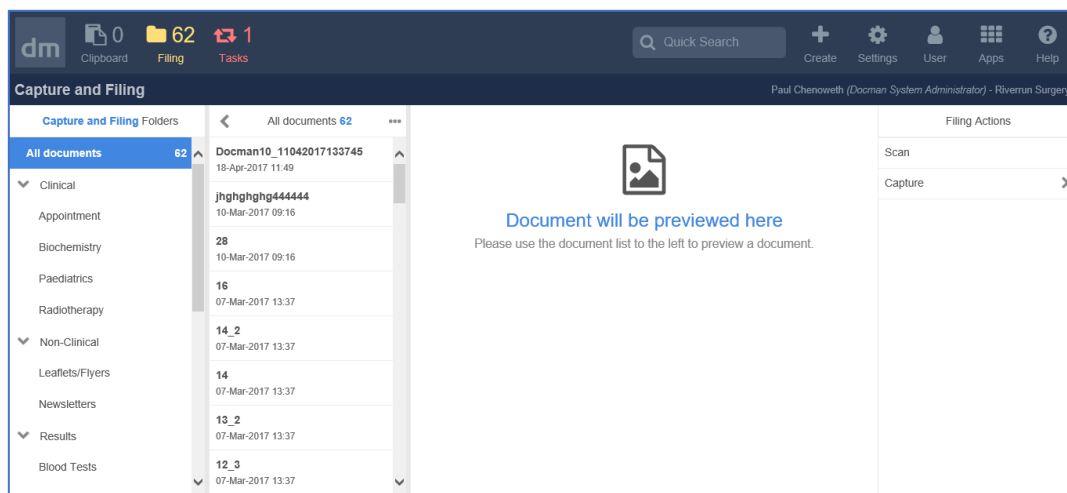
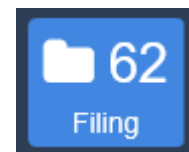
The Home Screen



Using the Blue navigation / notification bar across the top of the page allows access to all areas of Docman 10

TIP: The navigation / notification bar is available at the top of the screen at all times. Allowing notifications for the number of Documents in Filing screen / Total items in the Task Inbox to be visible.

The Filing screen is accessible via this tile (the number on the tile also informs the user how many individual documents are in the filing screen available to be filed.)

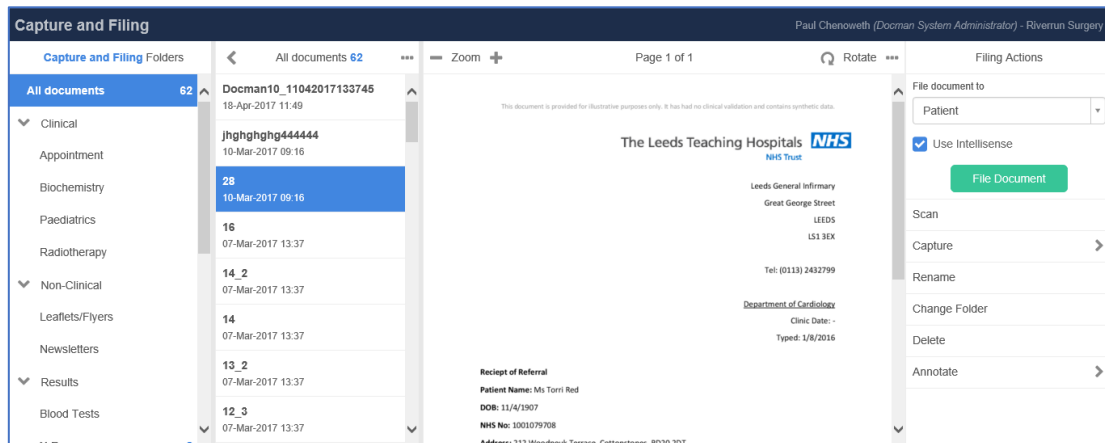


The filing screen is titled in the top left of the screen, and is split into 4 sections. Working left to right: pre-filing folders, document list, document viewer and filing actions.

TIP: The processing format in Docman 10 is left to right in all screens. This will build confidence & consistency through the software as all screens will work left to right.

Familiarisation of Docman 10

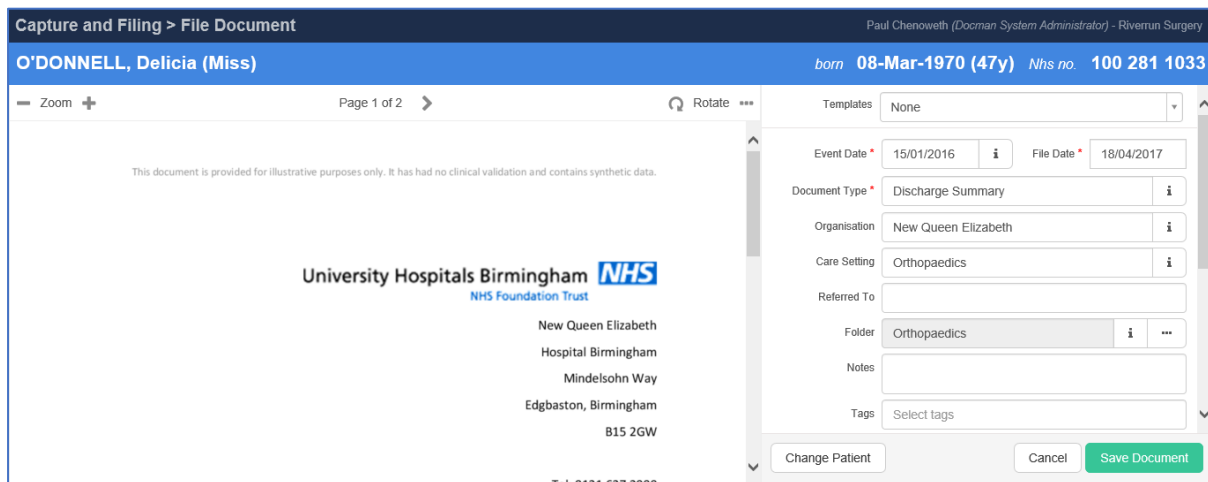
Only when a user selects a document, does the document appear in the document viewer panel. Once a document is chosen, more filing actions become available.



TIP: Intellisense – All instances of Docman now have Intellisense included. There are no license limitations. Intellisense is utilised on all Patient documents whether the box is ticked, or not.



By leaving the Use Intellisense box ticked, Intellisense will assist the user in filing.



A positive patient match is highlighted by the Patient ribbon showing the Patient demographics in blue beneath the Navigation bar.

The findings are shown in the fields on the right. The [i] (Intellisense findings) will change colour to green if there is more than one choice for the user to pick from.

TIP: The document is always visible on the left of the screen. Only fields marked by * are mandatory.

Familiarisation of Docman 10

Organisation	Pinderfields Hospital	i
Care Setting	Ac	x i
Referred To	Accident & emergency	

Create Review	Start Review immediately after filing
Document Security	Document Review
	Start Review immediately after filing
	No Review required
	Add to Document Clipboard
	Review using a Template
	Template: Dr Paul
	Template: Doctors

To send a document for review by another user, Create Review allows you to choose to file **the letter or file it into the patient's record** in Docman 10.

Add to Document Clipboard allows a user to send for review, multiple documents to another user/group as required, rather than one at a time.

Saving the document will Save it to the patients record, and if selected, it will then prompt you to send it to a User/Group for review.

Click

Templates	None	▼
Categories	None	▼
Reviewers		?
<input type="button" value="Add Reviewers"/>		

Add

Reviewers to choose multiple users or groups. Or use Workflow Templates from the dropdown menu above.

TIP: You are unable to add Users AND groups to a Review in one level. However, you can add multiple users to a review. Or use a defined group instead.

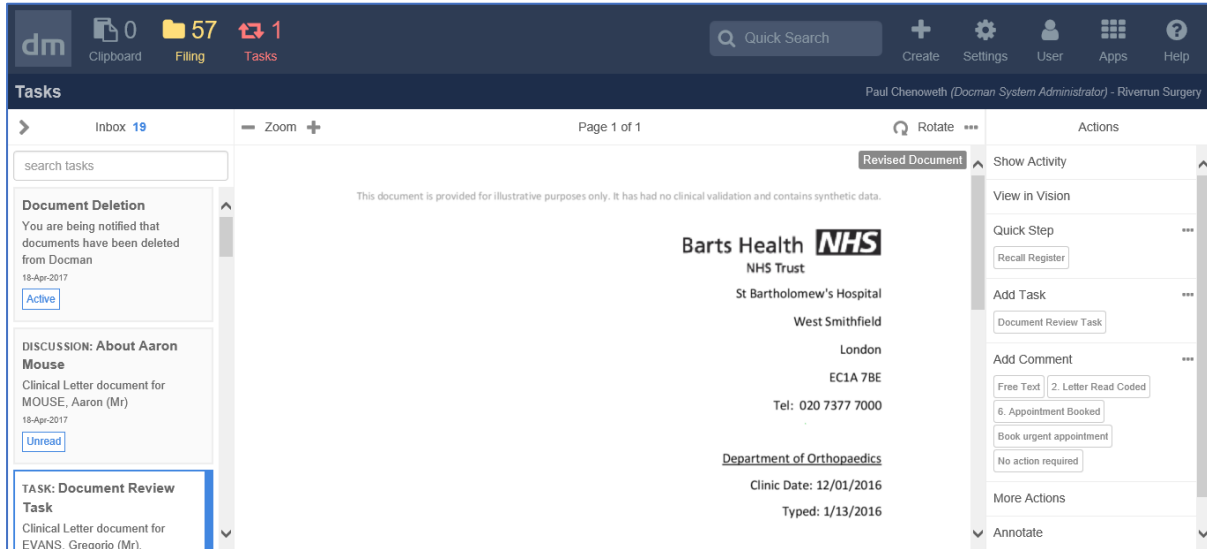
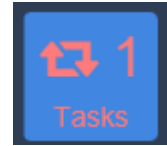
Click Start to send the document for review



Familiarisation of Docman 10

Tasks

Click on Tasks tile on the Navigation bar this will take you to your Task Inbox



The tasks are listed on the left, displayed in the middle and the Actions are on the right of the screen. As per the left to right working methods previously highlighted.

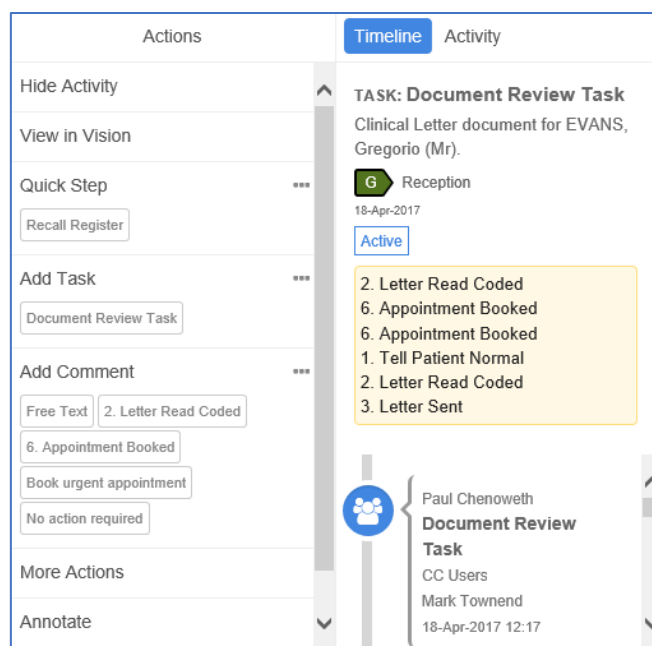
The chosen task will be highlighted by a halo, and the document displayed in the viewing panel.

Any actions available are listed on the right.

Show Activity

Show Activity

This will open the audit of the document relating to the task this user has been given. This will open another panel on the right.



Familiarisation of Docman 10

You can hide this by using the Hide Activity option.

Quicksteps, Actions and Comments are available in the fields by making them favourites, otherwise they are visible by clicking on the ... on the right.

To make a favourite, click on the ... next to Quicksteps / Actions / Comments

By clicking on the star outline and filling it in, this will define the item(s) as a favourite.



This will make the item appear on the front screen.

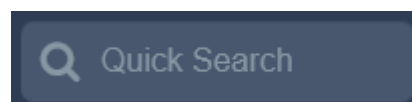
From Task Inbox, users can CC, forward, Pause, Stop and Decline Tasks, under More Actions

Annotations can be added to the document, as per the filing screen.

View Documents will link to the rest of the chosen patients letters in Document Viewer screen. (See below)

Patient / Document Search

Using the Quick Search field in the Navigation bar, users can search for both patients and within the content of documents in Docman 10.



As you type into the search field, further advanced search options become available.

Familiarisation of Docman 10

The screenshot shows the 'Advanced Search' interface in Docman 10. The search criteria are set to 'keitha'. The results are displayed in a list format, showing the first five patients:

- ABBOTT, Keitha (Ms)**
born 07-Apr-1959 (18y)
242 Lochaber Crescent, Cattledale, Middleton, LS22 5LC
- ABTAHI, Keitha (Mrs)**
born 15-May-1907 (109y)
4 Hazeldean Crescent, Cockpit Houses, Rishworth, LS5 2TG
- AKHTAR, Keitha (Ms)**
born 09-Feb-1927 (90y)
37 West Benhar Road, West Park, Walton, BD1 4PU
- AKHTARR-AKHTAR, Keitha (Mrs)**
born 17-May-1912 (104y)
234 Wheately Crescent, Havercroft With Cold Hiendley, Exeter, WF12 0XZ
- ALI, Keitha (Ms)**
born 01-Apr-1950 (67y)
254 Kenilworth Court, Brown Royd, Walsden, WF6 0WT

The interface also includes a 'Search Criteria' section with options for 'In' (Patient), 'Using' (Forename, Surname or...), and checkboxes for 'Hide Inactive Patients', 'Hide Synthetic Patients', and 'Use Exact Match'. A 'Search' button is visible. The results are paginated, showing 'Page 1 of 20'.

Results are pagged, and displayed in lists.

The screenshot shows the 'Advanced Search' interface in Docman 10. The search criteria are set to 'keitha miah 21.7.48'. The results are displayed in a list format, showing a single patient:

- MIAH, Keitha (Miss)**
born 21-Jul-1948 (68y)
127 Lochlea Road, Castleton, St. Helier, WF11 5TM

The interface also includes a 'Search Criteria' section with options for 'In' (Patient) and 'Using' (Forename, Surname or DOB). A 'Search' button is visible. The results are paginated, showing 'Page 1 of 1'.

A more detailed search will display a more refined list of results.

Document content can be searched by using Patient Documents in the dropdown menu.

TIP: Users can search by DOB, surname, first name, or a combination of ALL 3 for flexibility.

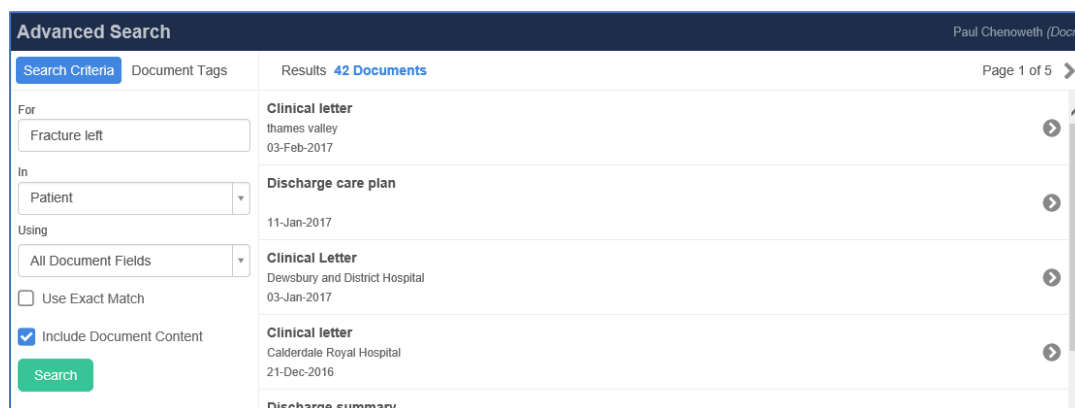
And all English (UK) DOB formats are accepted

Using 'Fracture Left' and ticking the 'Include Document Content' box I have been presented with these results.

The screenshot shows a search dropdown menu with the search term 'keitha'. The options are:

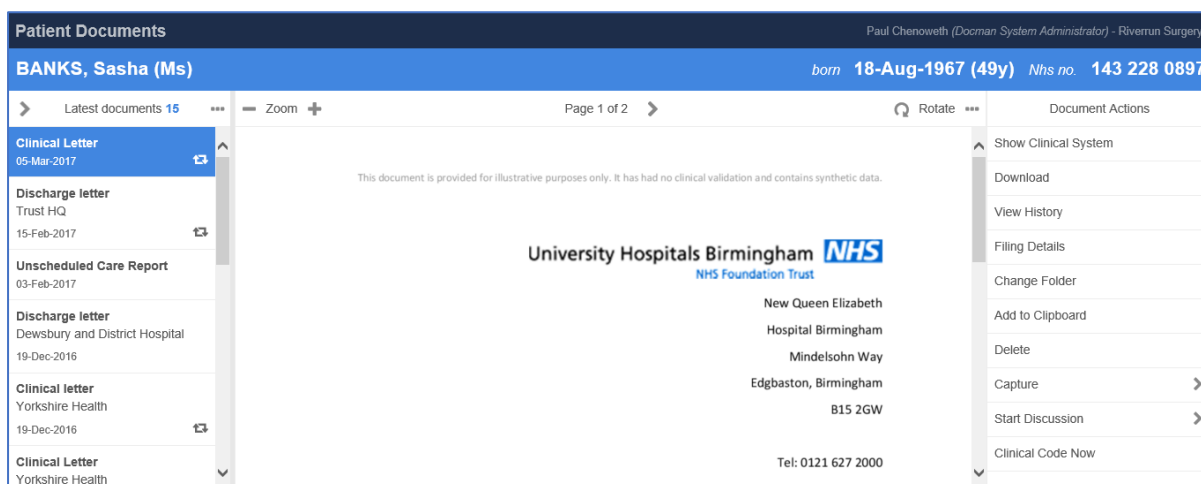
- Quick Search
- Patient - default press **enter**
- Patient Documents
- Documents Library
- Advanced Search
- Recently Viewed Patients
- Recently Added Patient Documents

Familiarisation of Docman 10



Once a user has chosen the patient, the Patient Documents screen will be shown.

Once a document has been selected the screen will populate the document viewer panel and all actions available to the user are shown on the right.



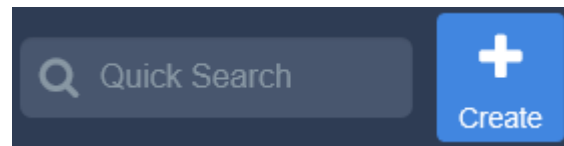
Document Actions on the right will show:

- **Show Clinical System** - Displays the patient record in the chosen Clinical System.
- The ability to download and use the local functions to
- **View History** – Displays the audit trail
- **Filing Details** – Allows a user to edit details
- **Change Folder** – Allows the user to change folder
- **Add to Clipboard** – Allows copy/move
- **Delete** – Allows the user to delete (Permission is defined by Roles)

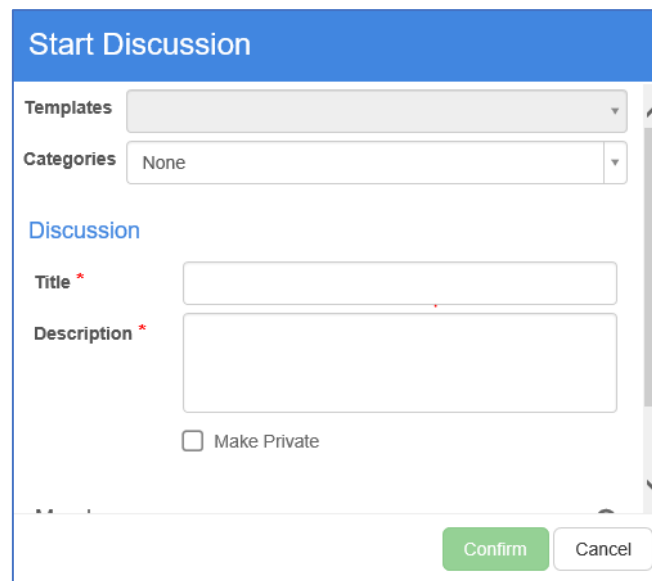
Familiarisation of Docman 10

Discussions

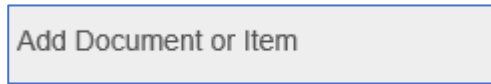
A user can create a discussion in Docman 10 by clicking on the Create button in the blue Navigation/Notification bar.



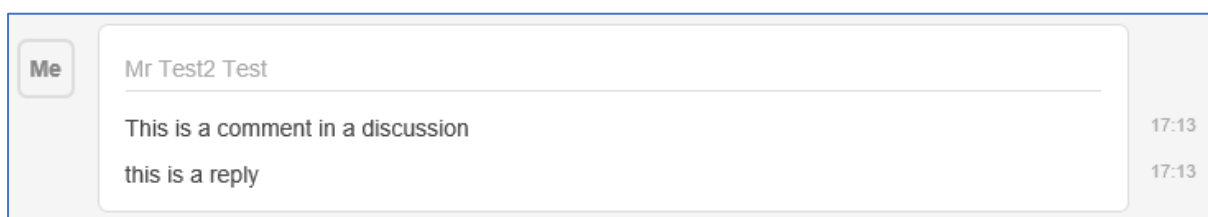
By adding in the users, giving the discussion a title and the first of any content, then clicking send. This will send the discussion into the users Task inbox, alongside their patient-related tasks, and any system notifications that they may receive.



In a discussion, users can discuss anything, however most usefully the system will allow a user to link a patient entry, a patients document, as well as non-patient documents and items in the Apps, such as Birth & Death register.



Users can add comments, tasks and further links to other items/patients/documents as the discussion goes on.

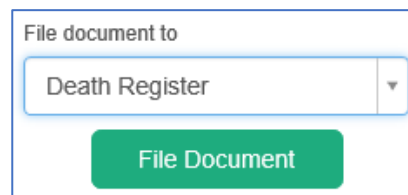


Familiarisation of Docman 10

Filing non-patient documents

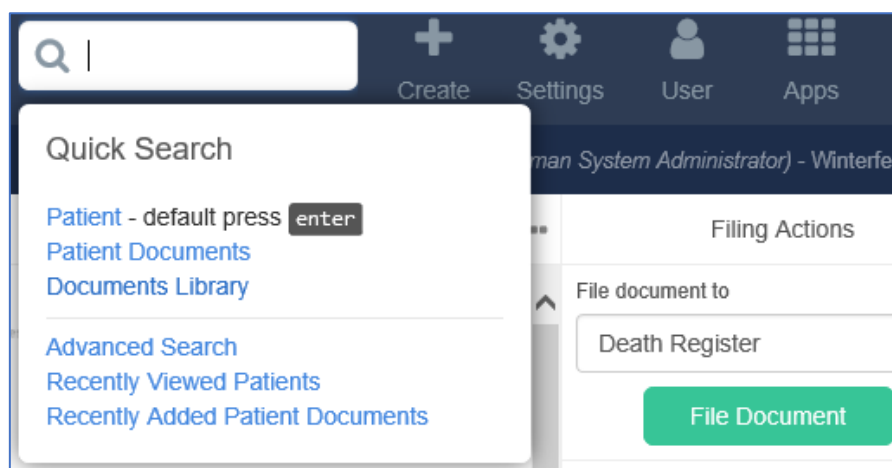
Documents can be filed to any one of the Apps, library, Surgery & Secured Documents that the practice use currently.

To do this, the user would define the App or library area in the initial filing screen.



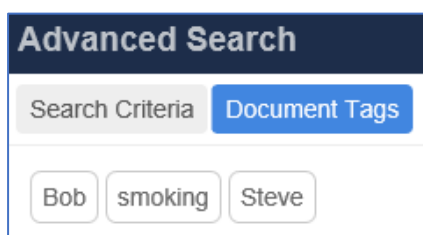
Please Note. Intellisense is not applied to non-patient documents to assist filing. Intellisense is a tool to assist the accuracy and speed of a Patient document to be filed.

Documents filed into the Document Library – which includes the Apps, and all areas of the Library can be found by using the shortcut in the Navigation bar or by using the Quick Search, and choosing Documents Library.



This will then show the user this screen and allow them to search the whole library, or filter and search by titles, tags and folders.

ByTags



By Folder

