

Docman 10
ICP.2020.R3.128-129
External Release Notes



Report created at: 07/10/2020

Notes / Special Instructions: Please note that the functionality relating to Emis PFS will initially be disabled and will not be activated until First of Type has been completed.

This release contains the following items:

JIRA ID	ServiceNow Ref	Area	Type	Title	Description
D10-4130	N/A	GP	Feature	Back to task Functionality	When a User clicks on the 'View documents' action within Tasks, they will now see a new action called "Back to Task". Selecting this will return Users to the task they were working on rather than taking them back to the top of the Task list.
D10-4347	N/A	GP/RMS	Feature	Improvements to ability to set default sorting order for filing & tasks at Organisation level	The dropdown option for Organisation default setting has been removed so that Users can select either Oldest first or Newest first. Once a setting has been applied at the Organisation Level, this is will apply to all Users.
DRM-36	CHG0001659	GP/RMS	Feature	Categories to be searchable & displayed in alphabetical order when editing a task	When editing a Task and applying a Category, it is possible to search for the Category you wish to apply rather than scroll through a dropdown list. This change has also been applied to the "Create Task" action and to the comments templates in Settings when creating a new comment.
DRM-40	INC0650139	GP/RMS	Feature	Document history to show which filing template was used when filing	When a document is filed using a template, the document history will now state which filing template was used. If no template was used to the file the document this information will be blank. Please note that historic documents will not display this information.
D10-4312	N/A	GP	Feature	Add new task from a Coding task	The "Add Task" action has been added to Coding Tasks, which will allow Users to create new downstream tasks while coding.

DRM-39	CHG0001392	RMS	Feature	Provide Category when creating a Quick Step template	A feature has been introduced which will allow Users to add a Category when building a QuickStep in Settings. This will save Users from having to manually “edit task” to change the category when sending it on to another User or Group.
D10-4257	N/A	GP/RMS	Feature	Out of Office notification when using Task Templates	<p>When sending a task using a Task Template, if the recipient User linked to that template has set their profile to out of office, a pop-up message will be presented to the sender to notify them of this. The sender will then have the option to either continue and send the task or press cancel.</p> <p>Similarly if a group of Users are linked to the task template and all members of the group have set their profile to out of office, the sender will be presented with a pop-up message to notify them of this. Again, they will have the option to either continue and send the task or press cancel.</p> <p>This functionality has been applied to Task templates for completion by all members and also individual members.</p>
D10-4289	N/A	GP/RMS	Feature	Ability to search for documents within a specific patient record	Users now have the ability to perform a document search within a patient record making it easier to find individual documents. This includes the ability to search on metadata when selecting, “All document fields” in a Patients document search. It is also possible to search document content, providing that this Setting has been enabled.
D10-4314	N/A	GP	Feature	Annotate within a Coding Task	The annotate function has now been added to Clinical coding tasks so it is now possible to highlight, stamp and redact when working on a coding task.
D10-4315	N/A	GP	Feature	Add clinical coding task type to quick step configuration	When building a Quick Step in Settings, it is now possible to add Clinical Coding as a task type so that the Quick Step being created will be made available to Users when working on a Clinical Coding Task.
D10-4352	N/A	GP	Feature	Allow quick steps to be used during clinical coding tasks	Following on from the above enhancement, The Quick Step action will now be available to Users during Clinical Coding tasks.
D10-4319	N/A	GP	Feature	“Procedure” code heading for EMIS Web customers	A new code heading has been added so that the patient record in Emis Web correctly reflects the type of codes being added in Docman 10. This new code heading can be set as a default when coding by going to Settings

					> Organisation setting> > Integration > Clinical System.
D10-4211	N/A	GP	Feature	Emis PFS: Set Patient Visibility when filing a document that is not being workflowed	<p>Users have to the ability to set whether or not a document can be shared with a patient via Emis Patient Facing Services.</p> <p>If no review is required and this has been selected and if the document has been marked for addition to the Clinical System a new tick box will appear: Visible to Patient (via Emis PFS).</p> <p>If the above criteria is met, this tick box will default to Visible to Patient meaning that once filed, Patients will be able to view their document via Emis Patient Facing Services.</p>
D10-4213	N/A	GP	Feature	Emis PFS: Auto-set Patient Visibility when filing a document	<p>If a Workflow has been created for a document, the User will not have the option to set it to visible at the point of filing. This is to mitigate against documents being accidentally shared with patients before they have been reviewed.</p> <p>When the document is filed and added to the Clinical System it will be marked as non-visible to the Patient and Provisional in Emis since the review must first be completed.</p>
D10-4214	N/A	GP	Feature	Emis PFS: Update Patient Visibility upon completely finishing a Workflow to make the document visible to a patient	<p>If a document needs to be sent for review, at any point in the workflow the User will have the option to set the Visibility of the document providing it has not been set. However, once this has been set it cannot be changed by another user.</p> <p>If when finishing the last step in the workflow the Visibility of the document has not been set, the document will automatically be set as visible via Emis Patient Facing Services.</p>
DRM-42	Barndoc CHG0001392	RMS	Feature	Make Triage, Urgency & Referral Type mandatory fields on filing screen.	The Triage, Urgency and Referral Type fields on the filing screen have now been made mandatory. This is to ensure that important information regarding the document is captured when the document is being filed.
D10-4216	N/A	GP	Defect	Inactive Groups still visible in User favourites list.	A defect was identified which continued to display inactive Groups in a User's favourites list. This allowed a User to send tasks to a Group that was no longer active. This issue has now resolved so that inactive Groups will no longer appear in a User's favourites list.

DRM-2	DFCT0011302/ DFCT0011261	GP/RMS	Defect	Creating merge letters issue, not all template entries showing up on preview	When creating a merge letter and applying template entries, the formatting, along with special characters used, were not reflected in the preview of the merge letter making it difficult for Users to read. Both issues have now been resolved.
D10-4601	21814261	GP	Defect	Unable to file when using Intellisense.	When attempting to file a document an error message would appear stating, "Intellisense is unavailable at the moment. Please contact support." This issue has now been resolved.
D10-4589	21812121	GP	Defect	Various Docman Errors since moving to Priority	An error occurred when attempting to view documents, file a batch a documents and when searching for patients. This issue has now been resolved.

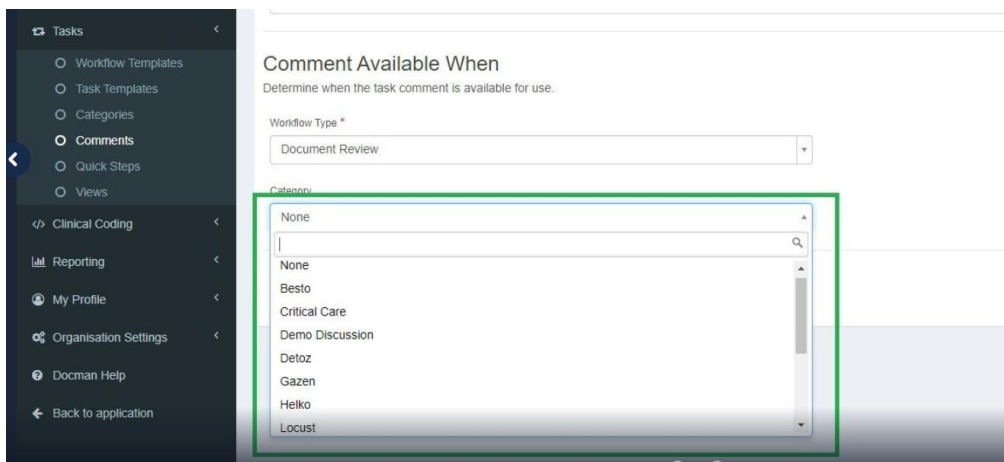
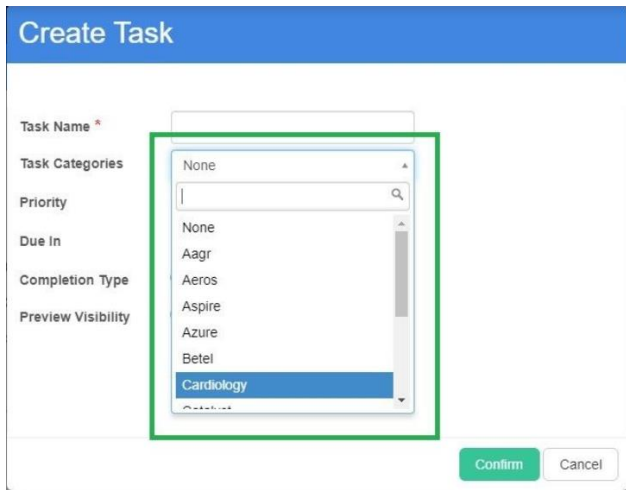
Screenshots

D10-4130 – Back to Task functionality

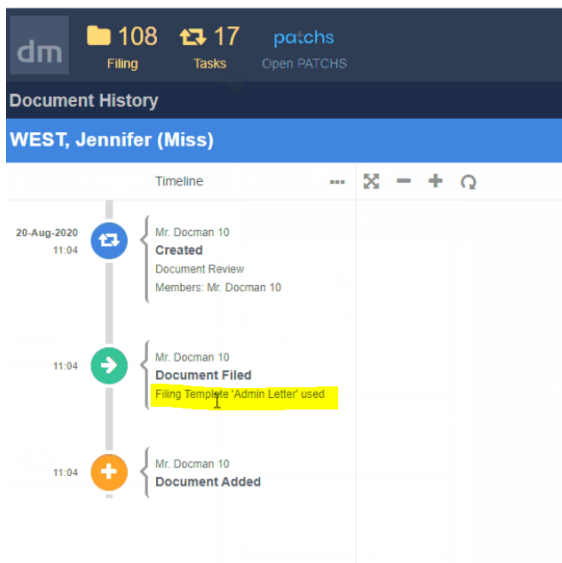
The screenshot shows the 'Patient Documents' interface for 'FARMER, Susan (Mrs)'. The patient's CHI No. is 999999999 and she was born on 01-Apr-1957 (63y). Her usual GP is Mr Map Medicine. The interface displays a list of documents on the left, including 'Admin Letter' and 'Hub Automation Document'. The main content area shows 'Department of General and Geriatric Medicine'. On the right, the 'Document Actions' menu is open, listing options like 'View in Emis Web', 'Patient Details', 'Back to Task', 'Download', 'Print', 'Email', 'View History', and 'Add Comment'. The 'Back to Task' option is circled in green.

DRM-36 Categories to be searchable when editing a task

The screenshot shows the 'Edit Task' dialog box. It has fields for 'Category', 'Priority', and 'Due Date'. A dropdown menu is open, displaying a list of categories: Cardiology, None, Agr, Aeros, Aspire, Azure, Betel, and Cardiology. The 'Betel' category is highlighted in blue. At the bottom of the dialog, there are 'Confirm' and 'Cancel' buttons.



DRM-40 Document history to display name of template used when filing



D10-4312 Add new tasks from a Coding task

The screenshot shows the EMIS interface for a patient named BOOTH, Joyce (Ms). The patient's CHI No is 9439625810 and they were born on 09-Aug-1958 (62y). The usual GP is Dr Brian Harding. The interface includes an inbox with 40 items, a search bar, and a list of tasks. The main content area displays the patient's details and a MedisecNET ref. The actions menu on the right is open, showing options like 'View in Emis Web', 'Add Clinical Code', and 'Add Task'. The 'Add Task' option is circled in green, with sub-options 'Create New Task', 'Task 2', and 'Qwerty' visible below it.

DRM-39 Provide Category when creating a Quick Step template

The screenshot shows the 'Quick Step Available when' configuration screen. The left sidebar contains the 'Settings Console' with various options like 'Users', 'Sections', 'Filing', 'Auto Filing', 'Tasks', 'Workflow Templates', 'Task Templates', 'Categories', 'Comments', 'Quick Steps', 'Views', 'Clinical Coding', and 'Reporting'. The main content area is titled 'Quick Step Available when' and includes the following fields:

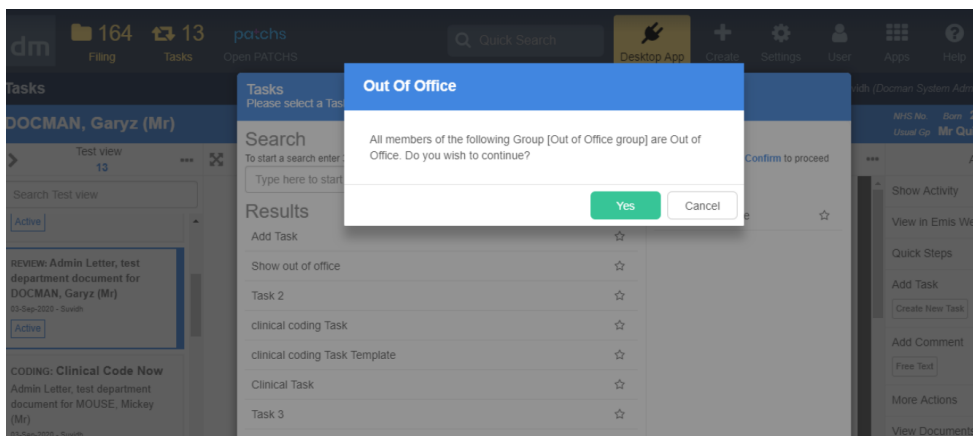
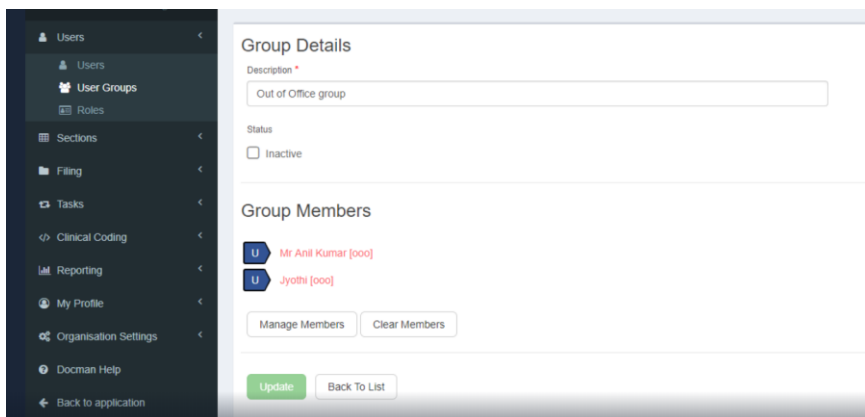
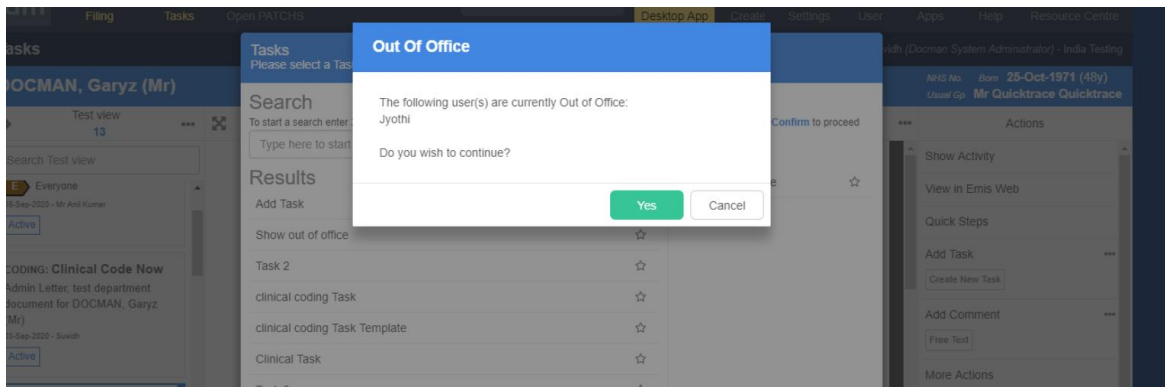
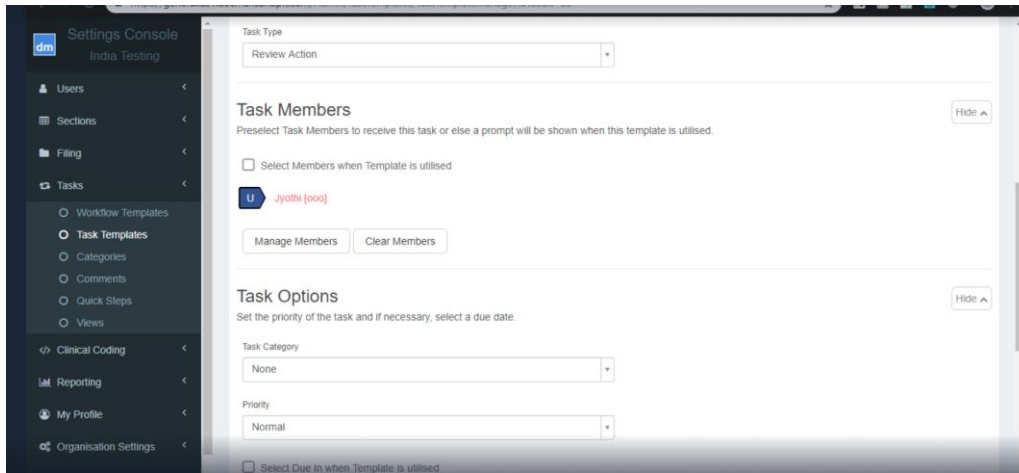
- Section: Patient
- Category: None
- Task Types: Review
- Steps: Change Category

An 'Add Step' button is located at the bottom of the steps section.

The screenshot shows the 'Document History' for a patient named GARYZ, Garyz (Mr). The patient's CHI No is 461424004 and they were born on 25-Oct-1971 (48y). The usual GP is Mr Quicktrace Quicktrace. The interface includes a top navigation bar with 'Filing' (164) and 'Tasks' (13) counts, a search bar, and various utility icons. The main content area shows a timeline of actions:

- 08-Sep-2020 16:20: Suvidh Quickstep Used (Change category)
- 16:20: Suvidh Task Category Changed (Document Review, Category changed from: Cardiology)
- 16:17: Suvidh Quickstep Used

D10-4257 Out of Office notification when using Task Templates



D10-4289 Ability to search for documents within a specific patient record

The screenshot shows the Docman interface for patient Mickey Mouse. The search bar in the document list is populated with the text "Organ". The main content area displays a message: "Document will be previewed here. Please use the document list to the left to preview a document." The document list on the left shows a single entry: "Description Organization Pain Management" dated "10-Jun-2004".

This screenshot shows a document preview for Mickey Mouse. The document title is "description". The document content includes:

- Our ref: 123-564-7894
- MedisecNET ref: [blank]
- Clinic Date: 10 June 04
- Prof Typed: 22 June 04
- Dr Doocan Sutton Park Med Cent Whitford
- Dear Dr
- Re: Mrs Mirmie Mouse
- Location: Longlight Manchester
- Diagnoses: [blank]
- Treatment: [blank]

 The document text concludes with a paragraph: "Thank you for referring this 51 year old lady to the Endocrine Clinic. She attended the surgery in May with a one year history of hot flushes, generalised muscle aches, fatigue and headaches. She says that her weight has been steady. She has also had palpitations and a tremor as well as some thinning of her hair. She denies any bowel disturbance. She does have a history of IBS. She has also noticed dryness, grittiness and watering of her eyes in addition to occasional diplopia and photophobia. She is getting some pain in the right eye and feels that the right eye is much more prominent than the left. She has a pressure sensation behind this eye."

The screenshot shows the Docman interface for patient Mickey Mouse. The search bar in the document list is populated with the date "10/06/2004". The main content area displays the same preview message: "Document will be previewed here. Please use the document list to the left to preview a document." The document list on the left shows three entries:

- Description Organization Pain Management 10-Jun-2004
- Descripto Org Pain Management 10-Jun-2004
- Search Pain Management 10-Jun-2004

Patient Documents

MOUSE, Mickey (Mr)

Latest documents 2

- referral
- procedure code testing (02-Sep-2020)
- referral letter (11-Aug-2020)

PLEASE NOTE THIS IS A TEST DOCUMENT

A29390 A29398
COL1 COL11
COL12 COL3
COL4 COL51
COL12 COL19
COL1234

Examination Date: 29/10/2017
Report Status:
Requested Procedure:
Procedure Description:

Forename: <No Donor>
Surname: Xxxxxxx
Patient ID: 999 007 4011
Gender: Female
Date of Birth: 15 Jan 1959
Home Phone:
Organization:

Department: Radiology
Description: Referral
GP Practice: Street Lane Practice

Search Criteria Document Tags

For: smith

In: Patient

Using:

- All Document Fields
- All Searchable Fields (slower)
- Document
 - All Document Fields
 - Event date
 - Date Filed
 - Review Date
 - Description

D10-4352 Annotate within a Coding Task

Tasks

MOUSE, Michael (Mr)

Inbox 38

SEARCH INBOX

- REVIEW: Admin Letter, test department document for MOUSE, Michael (Mr) (28-Aug-2020 - Mr Shiva Ram) [Active]
- CODING: Clinical Code Now** Admin Letter, test department document for MOUSE, Michael (Mr) (28-Aug-2020 - Mr Shiva Ram) [Active]
- REVIEW: Referral, referrals document for MOUSE, Danger (Mr) CHI No: 846735859 (27-Aug-2020 - Mr Shiva Ram) [Active]

DEPARTMENT OF GASTROENTEROLOGY

Tel: Fax:

Our ref: MedisecNET ref: Clinic Date: 18 June 04

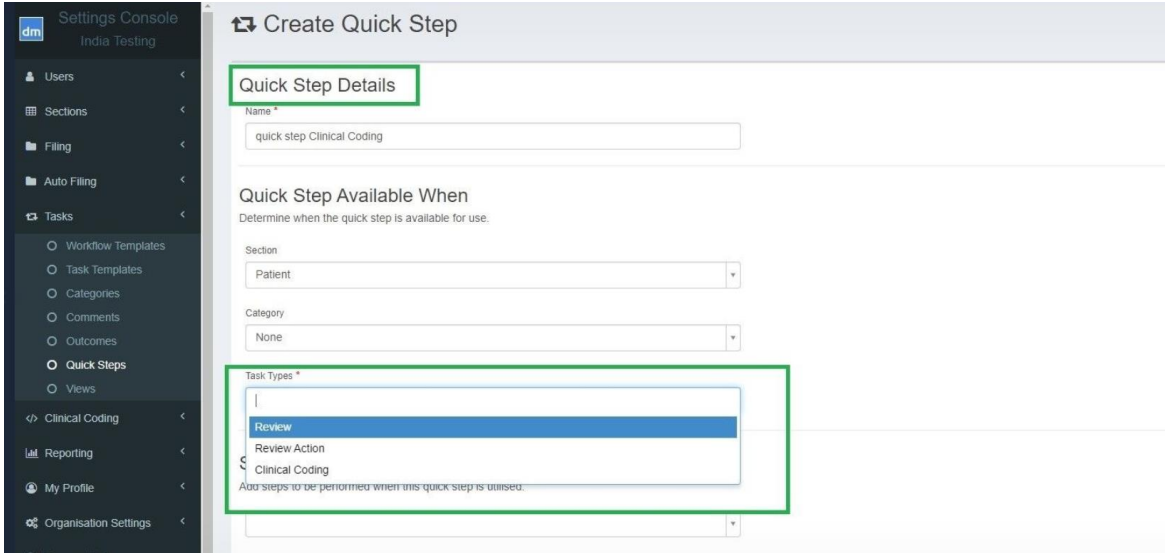
NHS No:
Typed: 22 June 04

Dr Dooman
Button Park Med Cent
Whitwood

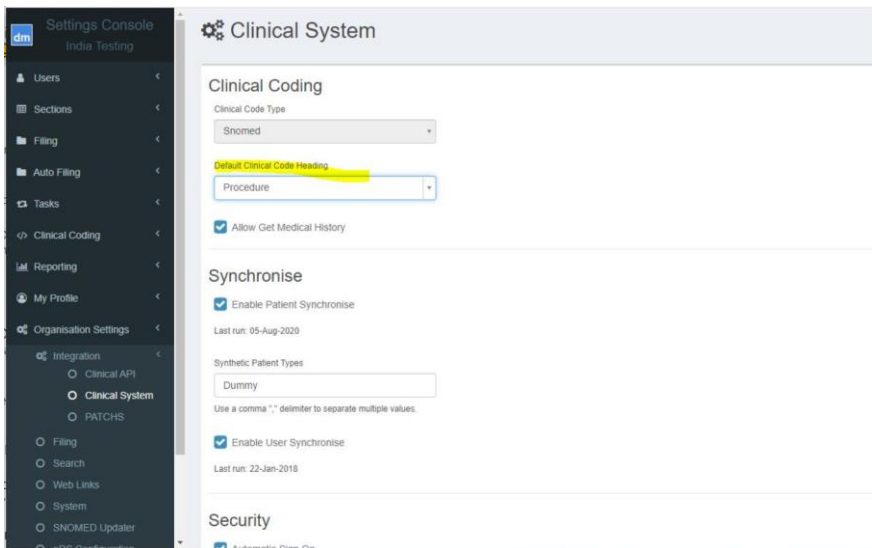
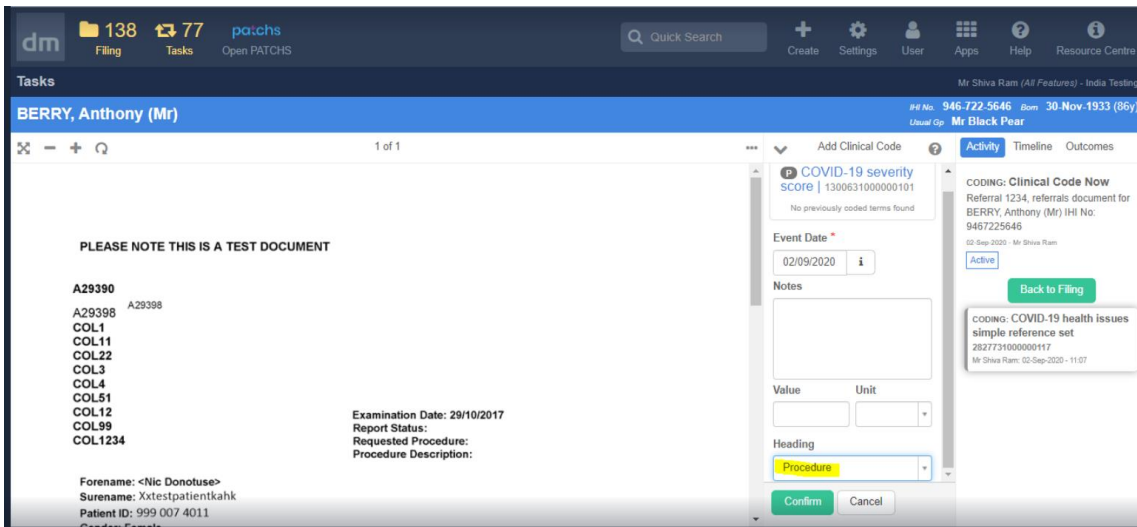
Actions:

- Show Activity
- View in Emis Web
- Add Clinical Code
- Add Code From Predefined List
- Add BP Reading - Found 0
- Add Task
 - Create New Task
- Add Comment
 - Free Text
 - Annotate
- Decline
- View Documents
- Start Discussion

D10-4315 – Add Clinical Coding Task type to Quick Step Configuration



D10-4319 Procedure Code heading for Emis Web customers



DRM-42 Make Triage, Urgency & Referral Type mandatory fields on filing screen

dm Filing 176 Tasks 213 patches Open PATCHS Quick Search Create Settings User Apps Help Resource Centre

Capture and Filing > Intellisense > File Document Mr Karthik SR (Docman System Administrator) - India Testing

LANE, Susan (Miss) NHS No. 194 002 2656 Born 04-Jun-1998 (22y) Usual Gp Dr Emis Test

1 of 1

PLEASE NOTE THIS IS A TEST DOCUMENT

A29390
A29398 A29398
COL1
COL11
COL22
COL3
COL4
COL51
COL12
COL99
COL1234

Examination Date: 29/10/2017
Report Status:
Requested Procedure:
Procedure Description:

Forename: <Nic Donotuse>
Surname: Xxtestpatientkahlk
Patient ID: 999 007 4011
Gender: Female
Date of Birth: 15 Jan 1959
Home Phone:

Event Date * 15/01/1959 File Date * 07/09/2020
Description * Referral
Organisation
Department referrals
Test
Symptoms
Urgency *
Triage *
Referral Type *
Folder Colorectal
Change Patient View in Demo System Save Cancel