

Release Notes

Docman 10 Release 145.3

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Overview

This release includes development work carried out in Sprints 144 and 145. The most notably change within this release relates to the user interface of Docman 10.

Both Docman 10 and RMS products have been given a cosmetic uplift, giving them a more modern and reinvigorated look and feel. This signifies the start of our Docman 10X work, with new functionality to be added in the future.

It also includes a new Automated Coding feature will be released to several pilot sites to trial the functionality before it is made widely available for other customers.

A new API has also been developed to provide an integration between Docman RMS and PEPR, which will allow PEPR to display any open Docman tasks and discussions for a User to complete in Docman RMS.

Release 145.3





RMS Changes

This release contains the following RMS specific changes:

Jira ID	Salesforce / Service Now Ref	Туре	Title	Description
DCMC- 385	N/A	Feature	RMS – PEPR Integration API Capability to return the patient document folder a document has been added to	As part of a new feature, the Docman RMS API can expose the patient document folder a document belongs to so that PEPR can add this information to a referral when a synchronisation takes place.
DCMC- 381	N/A	Feature	RMS – PEPR Integration User task count API	A new API call has been added which returns a count of active tasks for a given User. This will allow Users of PEPR to see how many Tasks they have in RMS without having to log in. A Windows username can also be checked if it is already linked to a Docman User account.
DCMC- 689	N/A	Feature	RMS – PEPR Integration New data items for Patient Document API endpoint	New data items have been added to the current 'Patient Document endpoint' in the Docman 10 API so that it can return the necessary information PEPR needs for PEPR to add to a referral when pulling it in from RMS. The new data items include 'Folder name' and UBRN.
DCMC- 386	N/A	Feature	RMS – PEPR Integration Task update synchronisation API	A new API has been created which can tell PEPR whenever a document has been updated in RMS so that PEPR can pull in the new information for a referral accordingly. The API can be queried with an updated since date/time range and optionally a Task name and return completed Tasks with the following details: Document GUID Patient ID Task name Task type Task Completion Date
				The Date/Time range must be restricted to 72 hours maximum.



DCMC- 382	NA	Feature	RMS – PEPR Integration Task comments API	 A new API call has been created to surface all Discussions and Review Task comments related to a specific document. This is so PEPR can add this information to a referral when Discussions are updated. The Document GUID can be used as the input parameter and this returns the following: Discussions related to the specific document, including: Discussion comments added User who added the discussion comments Date/time the discussion text was added It also includes information from finished review tasks: Task comments added User who finished the task and Task completion date/time If a 404 error is returned, then the document GUID is invalid.
D10-5352	21955520	Defect	Actions missing from View History action	Several task actions had been reported as not added to the history of a document. A fix has now been implemented by reworking how the SQL is built for document history.

GP Changes

This release contains the following GP specific changes:

Jira ID	Salesforce / Service Now Ref	Туре	Title	Description
D10- 5146		Feature	Organisation-level feature switch for Automated Coding	To control the roll-out of this functionality, an Organisation-level feature switch had been added so that Advanced can set which Organisations can use Automated Coding.
D10- 5147		Feature	Global settings to connect to the Clinithink Insight API	A global setting has been added to the Connect console so that the Clinithink API settings can be configured easily across the customer base by Cloud Ops.
D10- 5193		Feature	Create Action Button for Clinithink Insight API	A "Start AI Coding" action has been added to Tasks so that Users can perform automated coding.
D10- 5197		Feature	Create Independent Method for OCR document for Clinithink	A separate method in the Clinithink controller has been created to write OCR content to the database in the case where OCR content is missing for a document in Docman,
D10- 5198		Feature	Create New Clinithink controller to implement Clinithink API calls	A new action method has been created in the Clinithink controller so that OCR content can be sent to the Clinithink API to provide the User with suggested clinical codes.
D10- 5149		Feature	Basic Processing of Al codes	This feature will extract basic codes from the Clinithink Insight API response and provide Users with the results suggested by the AI when using Automated Coding.
D10- 5263		Feature	Display Al Coding Results in Ul	When actioning a Coding task using Automated Coding, Users will be presented with Snomed codes suggested by the AI to assist in the process of coding documents.
D10- 5178		Feature	Ability to edit suggested term attributes	Users can amend the attributes of coded terms suggested by the AI if they wish to do so while retaining the same coding term.



D10- 5179	Feature	Ability to omit suggested terms	Users can remove a suggested term from the list of codes suggested by the AI to omit it from the coding process.
D10- 5180	Feature	Highlight suggested term locations in the document	By hovering of a specific term that has been suggested by the AI, the code will be highlighted within the document.
D10- 5181	Feature	Identify potential duplicates in automated coding	Terms suggested by the AI are checked against the patient's medical history so that Users do not unnecessarily duplicate codes that should not be duplicated. "Get Medical History" must be enabled in Settings for this functionality to be activated.
D10- 5183	Feature	Blacklist inappropriate terms	Codes that a User would not typically add to a patient document will be automatically excluded when using Automated Coding if they meet the blacklist criteria.
D10- 5184	Feature	Assign EMIS term heading	When coding documents in Docman 10 and using EMIS Web, term headings will be automatically added, removing the need for the User to do it themselves manually.
D10- 5188	Feature	Assign associated term values	Associated term values will automatically be added when using Automated Coding to save the User from having to set these themselves. The User can still choose to amend these values if they wish to.
D10- 5296	Feature	Assign existing Problem code "Episode" using EMIS coded record check	Automated Coding will check terms against the patient's medical history in EMIS and assign the appropriate "Episode" for a Problem code so that Users do not unnecessarily duplicate codes. Please note that this only applies if the "Allow Get Medical History" functionality is switched on in the Docman Settings console.
D10- 5207	Feature	Function for Advanced to manage the Automated Coding Blacklist	Advanced will be able to filter out any blacklisted terms from use in Automated Coding so that they do not appear in the suggestions list. Examples include codes such as Address and Date of Birth.



D10- 5416		Feature	Remove duplicates of terms suggested by Clinithink more than once	Duplicate codes in the Automated Coding suggestions list will automatically be removed so that the User does not have to remove them.
D10- 5205		Feature	Assign units from the Automated Coding response	Automated Coding will assign units to terms so that the User does not have to. This User will be able to change the unit suggested from the list of units configured for the site.
D10- 5507		Feature	Add punctuation to OCR specifically for Automated Coding	Punctuation has been added to the OCR specifically for Automated Coding so that it can suggest terms based on the overall document as accurately as possible.
D10- 5432		Feature	User interface enhancements for the AI coding panel	A series of enhancements were added to make the AI coding panel clear and consistent so that the workflow is easy and intuitive for Users.
D10- 5500		Feature	User interface enhancements for Al coding items	The AI coding panel will show all relevant information required so that the User does not need to click into each individual term to check if it's been coded with the correct attributes.
D10- 5462		Feature	Use EMIS desired format for blood pressure codes	Automated Coding will continue to send blood pressure readings in a format that EMIS web understands so that the patient record has a complete history of BP readings in one place.
D10- 5596	21996991	Defect	Patient Facing Services Error when editing filing details and attempting to refile the document.	When editing the filing details of a document in a patient record and then attempting to re- file the document to EMIS this resulted in an error and the document would appear visible to the patient by default. A fix has now been implemented this issue.
D10- 5584		Bug	Patient Facing Services DTA closed but audit is still written	If a User sets the Online Status of a document without the Desktop App running, an action is audited despite not being executed in EMIS. This issue was found internally and has now been resolved. Users will now be notified that they cannot use the Online Services feature if the Desktop App is not running.



010- 665	Bug	PATCHS Auto- registration Status code 2 returned for NHS number matches	When PATCHS sends an NHS number to Docman, if it contains a space Docman cannot find a patient match. Any spaces will now be trimmed when performing the look up so that Docman is able to match the
		materies	correct patient even if the NHS number is initially sent with spaces.
010- 536	Task	Update Snomed Browser with latest NHS Digital release	The Docman Snomed Browser has been updated with the latest release of Snomed terms from NHS Digital.



General changes

The following changes have been made that are non-specific to RMS or GP:

Jira ID	Salesforce / Service Now Ref	Туре	Title	Description
D10-5040		Feature	Docman10 X UI	Both the Docman 10 & RMS products have been reinvigorated and re-branded with a new theme and style seen throughout the application. Users will immediately notice a change to the colour scheme and to the look and feel of existing icons and navigation bars. These changes are the first in a series of future modules to be part of Docman10X.
DCMC- 834	21974995	Defect	Third Party Unable to Retrieve from Share API	A defect was raised due to a Docman Share customer not being able to retrieve documents via the Share API. After closer investigation it was noticed that a duplicate field of "FolderName" had been added to one of the API calls which in turn was causing the customer's system to fail. This duplicate of "FolderName" has now been removed and any calls made to the API should now work as expected.
DCMC- 725	21945948	Defect	Failing to collect forwarded email images	When forwarding emails from an external mailbox to NHS mail, embedded images were not being captured by the ExchangeCollector. The reason for this was due to the contents being capture as html instead of converting to a base64 string. A change has now been made to the exchange collector which now converts the inline images to a base64 string and after conversion the images will now display as expected.
D10-5824	22023238	Defect	Issue with Search functions	Several areas of the application which use Search functionality were reported as not working.When using search to filter documents in the screen Capture and Filing the search functionality does not respond.When adding a clinical code at the point of filing and attempting to search for a code in the



Snomed browser the search functionality does not respond.
When searching for a pre-defined comment to add as an instruction as the point of starting a workflow this ability to search also does not respond.
A fix has now been implemented.



RMS Screenshots

N/A



GP Screenshots

D10-5146 - Organisation-level feature switch for Automated Coding

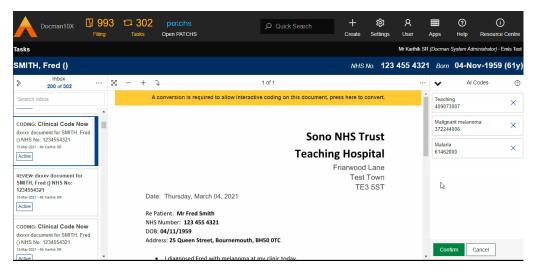
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💄 Users	Automated Coding	Use this option to enable Automated Coding		
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Document Collections		Use the option below to determine which Organisations this Organisation can send to via the API		
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D10-5193 – Create Action Button for Clinithink Insight API

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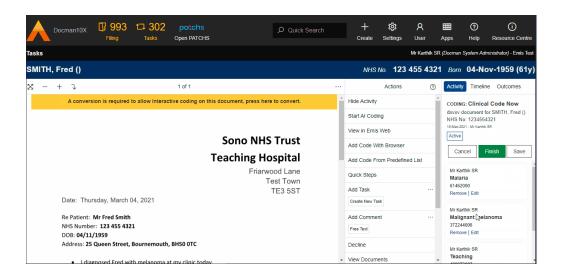
D10-5263 Display AI Coding Results in UI



D10-5178 Ability to edit suggested term attributes

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D10-5179 Ability to omit suggested terms

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D10-5180 Highlight suggested term locations in the document

D10-5181 Identify potential duplicates in automated coding

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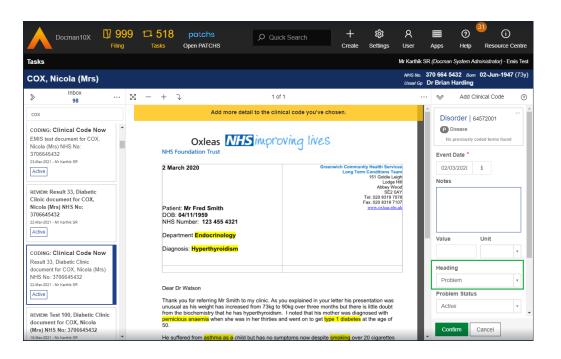
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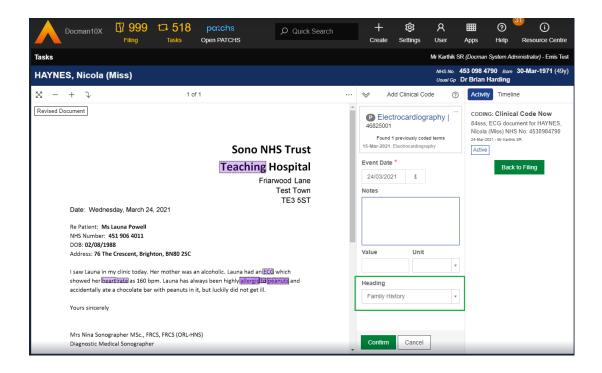
D10-5184 Assign Emis term headings

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Mrs Nina Sonographer MSc., FRCS, FRCS (ORL-HNS) Diagnostic Medical Sonographer	v	Confirm	Cancel	_						





D10-5188 Assign associated term values

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Search Inbox 2222, Ororogy upcament for COA, Nicola (Mrs) NHS No: 370664543 04-Mar-2021- Mr Kambk SR Active Due 17-Mar-2021 Has Comments	Revised Docume	ıt					-			
CODING: Clinical Code Now Fred22, Diabetic Clinic document for HAYNES, Nicola (Miss) NHS No: 4530984790 244/ar-0201- Mr Karthik SR Active	24 March Patient	2021 Fred Smith	Oxleas				Value	UI	nit	
REVIEW: Fred22, Diabetic Clinic document for HAYNES, Nicola (Miss) NHS No: 4530984790 24-Mar:0201 - Mr Karthik SR Active	DOB: 04/ NHS Num Departme			Commented [AY]	D. enderstology arread (fa 2]: 34480000 Kyperliys		73 Heading Examin	ation	v v	
REVIEW: 87b, Accident & Emergency document for HAYNES, Nicola (Miss) NHS No: 4530984790 24-Mar-2021 - Mr Karthik SR	inusual as from the bi pernicious 50.	for referring Mr Smith to my clinic. his weight has increased from 73 chemistry that he has hyperthyroi naemia when she was in her thir	As you explained in your letter his presentation was to bollog over three months but there is little doubt down I noted that his mother ways diagnosed with tes and went on to get type Italabetes at the age of on symptoms now despite ismoking over 20 classettes	anemia (situation)	9]: 297243004 Family In 9]: 430670008 <mark> Family In</mark> 6003		Confirm	Canc	el	

D10-5296 - Assign existing Problem code "Episode" using EMIS coded record check

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COLEMAN, Nicola (Miss	;)							374 356 Dr Briar		15-Jul-198	2 (38y)
Inbox 4 ··· 144e REVIEW Demo 144e2, Accident & Emergency document for COLEMAN, Nicola (Miss) NHS No: 3743566494 0*#er2021: Mr Name SR Active CODING: Clinical Code Now Demo 144e2, Accident	×	NHS N DOB: Addre I saw is a cc Launa	tient: Ms Launa Powell Number: 451 906 4011 02/08/1988 sss: 76 The Crescent, Brig Launa in A&E today. She's oncern as in the past she h	s currently experiencing a new episode had a TIA. rithfdepression; though she has no past i				Event	-2021: Psona 2 Date * 04/2021	linical Code	0
Energency document for COLEMAN, Nicola (Miss) NHS No: 3743566494 07-Apr2021-Mr Kamik SR Active		Yours	sincerely lina Sonographer MSc., Ff	with the second s				Value Head Pro		Unit	Y
REVIEW: Demo 144e1, Accident & Emergency document for BEN1, Daniel (Mr) NHS No: 123455781 01.4pc3221- Mr Karbik SR Active		Diagn	ostic Medical Sonographe	er				Acti Episo Rev	dic iew		v
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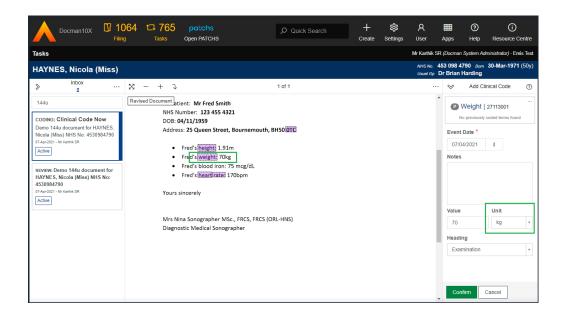
D10-5416 - Remove duplicates of terms suggested by Clinithink more than once

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OX, Nicola (Mrs								370 664 5 Dr Brian I		02-Jun-194	7 (73y
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endo		Treatment:						58800 Proces			×
REVIEW: Endorinology for MOUSE, Minnie (Miss) Doctors	Â	year history of steady. She disturbance. addition to oc	of hot flushes, generalised has also had palpitations a She does have a history o ccasional diplopia and phot	d lady to the Endocrine Clinic. She attended muscle aches, fatigue and headaches. She and a tremor as well as some thinning of h f IBS. She has also noticed dryness, grittin tophobia. She is getting some pain in the r	e says that her w her hair. She de ess and watering ight eye and fee	veight has be nies any bov g of her eyes	een wel 5 in	36407	rate 📧 5005 nation 120	lbpm	×
Active	-1	You comment of 236 and	ced her on Carbimazole 5m	eft. She has a pressure sensation behind thing the since blood tests showed that she wa feel that her symptoms have improved a	s markedly thyre			Sweat 41569 Proble	0000		×
Management document for COX, Nicola (Mrs) NHS No: 1706645432 8Mar-2021 - Mr Karthik SB		history of thy	roid disease but she is not	loes not drink any alcohol. She has four chil t in contact with all of her family.			,	Upwar 10326 Proble		eyes	×
Active	ow	tremor. She pericordium. upward gaze	had a small diffuse goitre p Her blood pressure was ¹² and she experienced pain	y toxic with a heart rate of 120bpm, warn palpable. There was a soft dejection systolic ²⁴⁴ / ₆₀ . On examination of the eyes there dic in the right eye on upward gaze. There was side. There was some diplopa on looking t	c murmur on aus I seem to be so s an obvious pro	cultation of t	the of	Propto 18265 Proble	800		×
Endo, Pain Management locument for COX, Nicola (N				Consultant Ophthalmologist, for assessmen pimazole to 30mg daily and I would be				Con		Cancel	



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HAYNES, Nicola (Miss)								1790 Born Harding	30-Mar-1971 (50)	y)
> 1nbox	S - + J	1 of 1					~	Add Cli	nical Code	9
144u CODING: Clinical Code Now	Revised Document atient: Mr Free NHS Number: 123 DOB: 04/11/1959						_		coded terms found	
Demo 144u document for HAYNES, Nicola (Miss) NHS No: 4530984790 07-Apr-2021 - Mr Karthik SR Active	Fred's heigh						07/	t Date * 04/2021	ŝ	
REVIEW: Demo 144u document for HAYNES, Nicola (Miss) NHS No: 4530984790 07.4sr3221 - Mr Karthik SR Active		g 70kg iron: 75 mcg/d ate: 170bpm					Note	5		
	Mrs Nina Sonograp	er MSc., FRCS, FRCS (ORL-HNS)					Value		Unit	_
	Diagnostic Medical						170		bpm	Ŧ
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D10-5205 – Assign units from the Automated Coding response





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D10-5500 – User interface enhancements for the AI coding items

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Indox 200 or 772 Search Indox 2.2., urongly document for Nicial (Mrs) NHS No: 370665432 Detailed 21: Wirachik SR Active Duti 17:Mars20 Has Comments Cotines: Clinical Code N Long term document for JOI Pauline (Ms) NHS No: 211969352 154-2021 - Mirachik SR Active Indox Long term document for JOIHN, Pauline (Ms) NH No: 2119693522 154-2021 - Mirachik SR	low IN,		as Intracranial hemorrhage f existing conscious level	1 of		iousness without	return		No previo Intract follow prolor consc to pre- level 12731	usly coded te ranial hem- ing injury to ged loss of iousness v existing c 2001 nation 23r	orrhage with of without return × onscious



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Nicola (Mrs) NHS N 3706645432 05-Mar-2021 - Mr Karthik SR Active Due 17-Mar- Has Comments	0: 8					s Intracranial hemorrha xisting conscious level	ge following injur	y with prolonged loss	of consciousne	ess without re	eturn		fol pro col to lev 12	pre-existing	y with	^m ×
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REVIEW: Long term for JOHN, Pauline No: 2119693552 18-Apr-2021 - Mr Karthik SR Active	(Ms)NHS	Ţ											Ţ	Confirm	Cancel	

D10-5462 – Use EMIS desired format for blood pressure codes

Tasks				Mrs Advanced Odyssey2	Docman Sy	rstern Administrator) - E	imis Test
POWELL, Launa ()			NHS No.	451 906 4011	Born	02-Aug-1988	(32y)
> Inbox 12		8 - +	٦ 1 of 1		~	Add Clinical Code	0
launa		Revised Documen	Add more detail to the clinical code you've chosen. TE3 5ST Date: Friday, March 05, 2021		P Blo 753670	ood pressure	
CODING: Clinical Code Now Clinic Letter, ECG document for POWELL, Launa () NHS No: 4519064011 0Htts:3221-Min Advanced Odysay2 Active			Re Patient: Ms Launa Powell NHS Number: 451 906 4011 DOB: 02/08/1988 Address: 76 The Crescent, Brighton, BN80 25C		Event Da		
REVIEW: Clinic Letter, ECG document for POWELL, Launa () NIS No: 4519064011 os-Max-321 - Mr. Advanced Odynwy2 Active			I saw Launa in my clinic today. She weight 93 kilograms and her height is 160cm. Her blood pressure is 125/85. Her blood alcohol levels are abnormal. Her Cognitive Linguistic Quick Test score was 90.		Systolic	Diastolic	
CODING: Clinical Code Now Clinic Letter document for POWELL, Launa () NHS No: 4519064011 09-Mer221-Min Adversed Odrawy2	ŀ		Yours sincerely		125	85	
Active	·		Mrs Nina Sonographer MSc., FRCS, FRCS (ORL-HNS) Diagnostic Medical Sonographer	*	Confirm	n Cancel	