

User Guide

Patient Visibility Functionality

Docman 10

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Version History

Date	Version	Issued By	Changes
08/01/2021	1.4	Charlotte Wood	Updates made following review
28/01/2021	1.5	Charlotte Wood	Addition of EMIS Help link

Version Approval

Version	Name	Title / Organisation	Approval Record
1.5	Allun Williams	Head of Product Management – Advanced	
1.5	Dr Stephen Miller	Clinical Director - NHS Digital	

Distribution

Date	Version	Name	Title

Document Control

Filename	Location	Minimum Retention
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Introduction

New features have been created to enable documents filed from Docman, to be made invisible to patients through Online Services.

Users will be able to make a decision at the point of filing or in workflow as to whether the document should be made visible or if they would like to prevent the visibility to the patient.

Please read this user guide to understand how to use the new features in Docman 10.Filing and workflowing documents in Docman 10

Filing and workflowing documents in Docman 10

Filing – no workflow required

When a document is filed in Docman with 'No Review required' and the 'Add Document link to EmisWeb' tick box is selected, users will be presented with a new option: **Visible to patient (via Online Services).**

By default, the Visible to patient tick box is selected.

Create Review	No Review required	v
	Start Clinical Coding immediately after filing	
	Add Document link to EmisWeb	
	Visible to patient (via Online Services)	

Users must deselect the Visible to patient tick box if they wish to prevent the document being made visible to the patient. (Once a decision has been made in Docman if a change to the visibility is required, this must be actioned within EMIS see <u>EMIS Web Knowledge</u> <u>Base</u> for guidance).

Create Review	No Review required	Ŧ
	Start Clinical Coding immediately after filing	
	Add Document link to EmisWeb	
	Visible to patient (via Online Services)	



If the user prevents visibility to the patient, the icon below will display in EMIS against the document entry.

Active × LEE, Laura (Mrs)	Born Susual G	30-Sep-1955 (64y) Gender Female NHS No. P BURGESS, Neil (Dr)	670 050 4198
Date Navigator	Date	Consultation Text	^
2020 (2)	24-Sep-2020	Docman	DME2020, DME2020 (0r)
Sep (2)	Additional	Attachment 🕘 Unscheduled Care NHS Direct	, and a second se
24th: [DME2020] Docman		Result	Online visibility is restricted
-			
) (Dr)			
Online visibility is restricted	1		

Filing – workflow required / review required for decision on visibility

If a user is not authorised or is unable to make a decision regarding online visibility, they have the option to send the document in a review task to another user to action as appropriate.

It is advised that the user should add an instruction to the task to inform the recipient that a decision is required for patient visibility via online services. (*See below for guidance for adding new instructions)

\sim		Filing	
€	Templates	None	v
	Categories	None	Ŧ
Review	/ Members		0
	U Admini	strator	
	Normal priority	, no due date specified, any Reviewer can complete, default	Olaar
1st level	category will be Services'' inst	e applied and "Decision Required for Patient Visibility via Online ruction.	Clear
	Edit Reviewers	Settings Add Instruction	
Add Re	eviewers		



As the document has been sent on for review, the entry in EMIS is marked as provisional and the document is not visible to the patient.

Active 🛛 BARRY, Angela (Miss)	Born 19-Sep-1974 (46y) Gender Female NHS No. 751 973 4528 Usual GP HARDING, Brian (Dr)
Date Navigator	Date Consultation Text
020 (1)	24-Sep-2020 Docman DME2020, DME2020 (Dr)
Sep (1)	Additional (Provisional) Attachment 🕖 Admin Letter Insurance
24th: [DME2020] Docman	Administration
	•
Docman	
[Provisio]	na/7 Attachment 🔟
Administr	ation

- **1.** When the task recipient clicks on the task, the instruction will display on the task card
- 2. The task recipient is presented with the ability to allow or prevent visibility. If a decision is made, no other user in the workflow can make a decision in Docman. If no selection is made and they are the final user in the review task workflow, by default the document will be made visible







Workflow / Tasks in Docman 10

When a document is sent in a task/workflowed in Docman and the 'Add Document link to EmisWeb' tick box is selected, the filer will not have the option to make a decision on the visibility.

The task recipient will be presented with a new option in the actions pane: **Online** services – Allow viewing of this document or Prevent viewing of this document.

The task/workflow recipient is presented with the ability to allow or prevent visibility.

If a decision is made, no other user can change the visibility setting from within Docman.

If no selection is made and the user is the final recipient in the workflow, by default the document will be made visible to the patient, although this can still be changed at this point if that is the desired outcome.

FARMER, Steve	n (Mr							NHS No. 8 Usual Gp	838 092 8467 Born 17-Feb-1974 (46y) Dr Emis Test
Inbox 24			×	 ŀΩ		1 of 1			Actions
Search Inbox								i i	Show Activity
REVIEW: eded, Neurology									View in Emis Web
document for FARMER, (Mr) NHS No: 838092846	Steven 7						Outres INTURS		Annotate
Active High Due 08-Oct	2020						Oxleas <u>INTERS</u>		Quick Steps
		il.					NHS Foundation Trust		UBRN
Cardiology document fo	re, r HS No:								Add Task ***
8380928467 23-0er-2020 - Dr Peti Docman	15 110.								Ltd Orenered
Active					14 October 2020			- 1	Free Text
REVIEW: test, Neurology							151 Goldie Leigh Lodge Hill		More Actions
document for WEST, Ma NHS No: 6861754462	rk (Mr)						Abbey Wood		View Documents
Active							Tel: 020 8319 7078		Add Clinical Codes
REVIEW: Clinical Letter					Patient: Mr Guy Borris		Fax: 020 8319 7107 www.oxleas.nhs.uk		Start Discussion
Orthopaedics document WEST, Mark (Mr) NHS No	for o:				DOB: 04/11/1959				Print
6861754462 23-Dot-2020 - Dr Poti Dociman					NHS Number: 947 611 6447				Email
Active					Department Condictory				Create Merge Letter
REVIEW: dan, General Me	dicine				Department Cardiology				Westflow Treater Depart
document for WEST, Ma NHS No: 6861754462	rk (Mr)				Diagnosis: Atrial Fibrillation				Online Services
23-Oct-2020 - Dr Poti Docenan Active									Allow viewing of this document
		-			Clinical Type: Follow up				



Audit in Docman 10

The audit will record the decision made on patient visibility in the document history section.

Document Hi	istory	Do	cument Hi	story	
WEST, Mari	k (Mr)	K	ENT, Lesli	e (Mr)	
	Timeline	***		Timeline	
23-Oct-2020 09:32	Administrator Emis Patient Visibili Document has been set a for patient in Emis Web	23 as viewable	-0c 2020 15:47	Dr Pcti Docman Emis Patient Visibility Document has not been set viewable for patient in Emis	as Web
09:32	Administrator Document Filed		15:47	Dr Pcti Docman Created Document Review Members: Dr Pcti Docman	
09:32	Administrator Document Filed to C System Seen in general medical 185241003	Clinical	15:47	Instruction: Decision Requir Patient Visibility via Online S Dr Pcti Docman Emis Patient Visibility Document has not been set viewable for patient in Emis	ed for Services as Web
-	· ~ ~		15:47	Dr Pcti Docman Document Filed	
			15:47	Dr Pcti Docman Document Filed to Clin System	nical
		15-	-Sep-2020 14:30	SYSTEM Document Added	