



PCTI Solutions Ltd
Docman 7 & Intellisense
Reference Guide

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Summary

Please note that this documentation is a reference guide for the Docman system and should **NOT** be used as a training manual for Docman.

For a more in-depth Training Guide on the Docman system, please refer to the F1 help menu held within Docman 7 along with tutorial demos which are accessible via the Docman Main Menu.

This documentation is designed for the current Docman 7 Version (71239), so if there are noticeable differences with this reference manual and your system please update to the latest build.

Logon/Logoff Docman

Logon

To correctly login to Docman use the shortcut either via the desktop or programs via start menu. Your Docman 7 username is usually the same as your Clinical System username. When logging on to Docman for the first time leave the password blank or type in the temporary password provided.

User Roles

Selecting your user role will not effect the user's permissions within Docman. This option is for auditing purposes only.

This option will appear when you logon to Docman for the first time, but can be modified at any time via Maintain List.

Logging Off

To correctly logout of Docman, please click on 'logout' which is located in the Main Menu or clicking on the Docman icon within the system tray (bottom right) and click on logout.

Scanning/Filing

Scanning

1. Select 'File Document' from the Main Menu.
2. To scan a new batch click the 'Scan' button or to add pages to an existing batch click on 'add pages'. **NOTE** – When adding pages to a batch make sure that the correct batch is selected beforehand.
3. From the scanner settings make sure the appropriate options are set i.e. front or both sides etc.
4. Click on 'Scan'.
5. If you need to remove a page(s) from a batch, highlight the page(s), move cursor over the image, right click and 'Remove selected pages'.

Filing Letters

1. Make sure that the correct letter is selected in Docman. To file a multipage letter, select the first page and hold your shift or ctrl key and select the extra pages.
2. Check that the filing section is set to 'Patient', click on 'File Document'.
3. Enter the patient details into the search window i.e. forename & surname, Patient ID etc.
4. Highlight the patient then click on 'Select'.
5. You will then be required to select the letter type of the document i.e. admin letter, clinical etc.
6. Choose the event date which relates to the letter in question.
7. You will then be provided with a picking list for the letter (i.e. Hospital name, department name, result type etc) single click the relevant answers for each question.
8. The File Document screen allows you to check the information added during the filing process, this can be amended if required.
9. If the letter is to be workflowed or filed to your clinical system, make sure the relevant options are selected.
10. Once all ok, click on 'File Document' or press F12.
11. If you wish for a document to be removed once finished filing, make sure the 'remove after filing' option is ticked which is selectable via 'Filing'.

General Users

Viewing Patient Documents

1. Load the relevant Patient within your Clinical System.
2. From the Docman toolbar, click on 'Patient Documents' or 'Docs'.
3. If a document has two blue arrows forming a circle, this mean that the document is still 'Active' within Workflow and is currently been dealt with by a Doctor/Staff member.
4. Yellow Post-it note means a user has commented on the Document. Click 'view comments' or press shift+F6 to view this comment.
5. To View the document's history, highlight the document and press F6.
6. Edit filing details – Select the document you wish to edit, right click and select 'Edit Filing Details'. Change the details as required and make sure the file to clinical system option is ticked and 'Save'. **NOTE – You will be required to delete the original entry from your clinical System prior to editing and re-saving the document.**
7. You have a number of options to help modifying and maintaining patient documents:
 - a. Press CTRL+S will enable the select mode options, Once enabled, you are able to tick against the documents you want to modify by putting a tick in the empty tick boxes and then click on 'Selected Documents':
 - i. You can delete the documents which are currently selected.
 - ii. Copy/Move documents from one patient to another. **NOTE – This will NOT** update the entry within your clinical system. You will need to make the required changes to your clinical system yourself.
 - iii. Print selected documents. An easy way to print all documents is to hold down CTRL and press A then P
 - iv. Workflow Documents, this will allow you to workflow any document not already active within Docman.
8. Click on 'Document' this will give you the options to 'Check out for editing' or Export the documents. For a more in-depth guide on check out for editing visit: <http://www.primecareuk.co.uk/Support/bulletins/Extracting%20DM7%20Docs%20for%20CAB.pdf>
9. To search for a document within Docman, from the Main Menu click on 'Document Search'. Enter the details you wish to search on i.e. hospital, department, date etc.

NOTE – If any of the options mentioned above are not accessible then you may not have the correct user rights. Ask your system Administrator to provide you with these settings if required.

Workflow

****TIP**** Within Workflow, if you go to 'Options' > 'When Marking as Seen' and make sure that there is a tick next to 'Re-route and Comment when marking as seen'. This will make life easier for you when needing to re-route a letter in one easy step.

To Access Workflow, this can be done by either clicking on 'Workflow' from the Main Menu or on the toolbar (Icon for Workflow on the toolbar will look like two blue arrows forming a circle).

Complete an Action

1. The Inbox will display all active workflows which are currently with the Docman User you are logged in as.
2. Any workflow which has an action to be completed will have an orange triangle next to it.
3. To see what the action is, look at the user comments (lower left hand corner).
4. You will notice that the action required will have [Actionable] next to it.
5. Click 'Clinical System' to load patient in your clinical system, deal with action required.
6. Once the action has been completed, go back to the workflow screen.
7. Click 'Action Complete' (if you have done it!); put relevant comment about what you have done.
8. Click 'Mark as Seen', 'Completed', 'Save'.

Cannot complete the action

1. If you are unable to complete the action required, click on 'Comment or Action'
2. Within the 'free text comment' box enter relevant message on why you can't complete this action. This will be recorded into the document audit.
3. Click 'Select'.

Re-Route a letter

1. To re-route a letter to a user – Click on 'Mark as Seen', click on 'Add'.
2. Select users name Click 'Save'.

NOTE – Any workflow which is completed but still has an outstanding action will be shown within the workflow view 'Documents with Actions'.

Clinicians

Viewing Patient Documents

1. Load the relevant Patient within your Clinical System.
2. From the Docman toolbar, click on 'Patient Documents' or 'Docs'.
3. If a document has two blue arrows forming a circle, this mean that the document is still 'Active' within Workflow and is currently been dealt with by a Doctor/Staff member.
4. Yellow Post-it note means a user has commented on the Document. Click 'view comments' or press shift+F6 to view this comment.
5. To View the document's history, highlight the document and press F6.
6. Edit filing details – Select the document you wish to edit, right click and select 'Edit Filing Details'. Change the details as required and make sure the file to clinical system option is ticked and 'Save'. **NOTE – You will be required to delete the original entry from your clinical System prior to editing and re-saving the document.**
7. You have a number of options to help modifying and maintaining patient documents:
 - a. Press CTRL+S will enable the select mode options, Once enabled, you are able to tick against the documents you want to modify by putting a tick in the empty tick boxes and then click on 'Selected Documents':
 - i. You can delete the documents which are currently selected.
 - ii. Print selected documents. An easy way to print all documents hold down CTRL and press A then P
8. To look at Patient documents prior to Docman, click on 'Existing Documents'.

NOTE – If any the options mentioned above are not accessible then you may not have the correct user rights. Ask your system Administrator to provide you with the correct user rights.

Workflow

****TIP**** With Workflow, if you go to 'Options', 'When Marking as Seen' and make sure that there is a tick next to 'Re-route and Comment when marking as seen'. This will make life easier for you when needing to re-route a letter in one easy step.

1. Click on 'Workflow' from the Main Menu or Toolbar (Icon on toolbar of two blue arrows forming a circle)
2. To file a letter with no action required – Click on 'Mark as Seen', tick 'No Action Required', click 'Save'.
3. To forward a letter and request an action on a letter – Click on 'Mark as Seen', click on 'Add', Select users name, tick relevant Frequently Used Comment or type comment into 'free text comment' box and tick 'Actionable', click 'Save'.
4. To highlight a document, Click on highlight pen (Document toolbar). Highlight the area of the document required, click 'Mark as seen', and tick 'Readcode Highlighted', Select user, click 'Save'.
5. The 'clinical System' option will automatically open the selected patient within the Clinical System (must be logged into Clinical System to function)

Non-Patient

Filing

You can scan the documents in as normal as there will be no changes with this (see scanning section on how to do this)

1. Make sure that the correct letter is selected in Docman. To file a multipage letter select the first page and hold your shift or ctrl key and select the extra pages.
2. Check that the filing section is set for the correct section i.e. 'Surgery Document', 'Secure Document' etc.
3. Click on 'File Document'.
4. You will then be required to select the letter type of the document i.e. 'Secured Document', 'Surgery Document' etc.
5. Choose the event date which relates to the letter in question.
6. You will then be requested to select the relevant folder; you can click 'Cancel' if you do not wish for the document to be placed in a folder.
7. Enter the Document Description and the click 'OK'.
8. Choose if you wish to Workflow the Document.
9. Once ready to finish filing click 'File Document' or press F12.

Viewing

1. From the Main Menu click on the non-patient section you wish to view i.e. Surgery Document's, Secured Documents.
2. All documents will now be available to view within the section.
3. You can choose specific documents to view from the folder options on the left hand side. If a document is not placed within a folder, select 'Not in a folder' or 'All Documents'.
4. You have a number of options to help modify the documents within this section:
 - Pressing CTRL+S will enable the select mode options, Once enabled, you are able to tick against the documents you want to modify by putting a tick in the empty tick boxes and then select 'Selected Documents':
 - i. You will be able to delete documents
 - ii. Copy/Move documents from one section to another
 - iii. Print selected documents
 - iv. Workflow Documents
 - Click on 'Document' you will be able to 'Check out for Editing' or Export the documents.

NOTE – If any of the options mentioned above are not accessible then you may not have the correct user rights. Ask your system Administrator to provide you with these settings if required.

Address Book

1. This option is accessible via the Main Menu
2. In here you are able to add, edit and delete contacts. NOTE these options are dependable on your Docman user rights.

Intellisense

NOTE – If you are having any issues with Intellisense, there are video tutorials which are located from the Docman Main Menu and 'Tutorial Demos'.

Filing

NOTE- Intellisense filing should only be used for typed letters.

1. Scan the document(s) in as normal
2. Make sure that the option 'Use Intellisense' is ticked
3. Click on 'File Document'
4. Check that the patient details which are picked up correspond with the details on the letter.
5. Check the filing details selected are a correct match with the letter. **Remember** you can single click on the suggestion to see where the relevant words are within the letter, double click to de-select an entry if you do not agree with the choices. Any section left un-ticked or blank, the system will bring up the filing lists so these can be selected manually.
6. Click on 'Continue' once you're happy with the selection.
7. The File Document screen allows you to check the information added during the filing process, this can be modified if required.
8. Select if the letter is to be Workflow, file to clinical system etc.
9. Once all ok, click on 'File Document' or press F12.

Readcoding

NOTE- The Intellisense option will only be available for documents which have been filed with Intellisense.

1. From your workflow Inbox, click on 'Summarise'.
2. Click on 'Detect Diagnostic' to search for diagnostic codes or 'Detect All Read' for Every Readcode relating to the letter.
3. Click on the term to display the letters within the Letter Preview.
4. Double click on the term if you would like to add to the patient records.
5. Click on 'Summarisation'.
6. Add any free text or copy some text from the letter (click on the readcode, click on 'Intellisense tab', highlight the text, right click and click on 'save summary text'.)
7. Click on 'Save Summary in Medical Records'.
8. **Synergy** – Ensure date is correct, link readcodes to relevant problem and 'Save'
EMIS – Ensure date is correct and 'Save'
9. You have now read coded the letter. Close this window and you may file or action the letter as usual.

Maintain List

NOTE – Only users with selected Docman permissions will be able to use these options.

Filing Templates

1. Select 'Filing Template' from the list.
2. To add a new template click on 'Add'
3. You will be required to select the section to which this template will be related to.
4. Enter the template name.
5. Make sure the event date is set to '{prompt the user}' this will let the user select the event date.
6. Enter the rest of the details to which the filing template will be relating to, any detail's which are not required can be left blank.
7. If this is a patient filing template, you will be given the option 'clinical entry' this will let you set how the document is to be readcoded at the filing stage, you can pre-define a readcode, or let users select from a filing list.
8. Once finished, click on 'Save'.

Intellisense Templates

1. Select 'Intellisense Templates' from the list.
2. To add a new template click on 'Add'.
3. Enter the template name.
4. Enter the details to which this template is relating to.
5. Select the Clinical Entry which relates to this template.
6. Click on the 'IS Keywords' tab.
7. Click on 'Add Keyword'.
8. Type in the keyword or phrase you want Intellisense to check for during the filing process.
9. You can add multiple entries to a template if required.
10. Once finished click on 'Save'.
11. You can modify any of these templates at any time, this is to add or remove keywords, or edit any of the filing details of the template.

NOTE – Whilst filing with Intellisense if there are any keywords in a letter which you wish to add to an existing template. If you highlight the text, right click and select 'Add to a template keyword list', choose the template and then click on 'Save'.

Filing Lists

1. Select 'Filing Lists' from the list.
2. Click on relevant list heading (i.e. Hospital/Clinics, Departments, Results) to which you wish to add to.
3. To Add a Hospital to Docman – select Hospital from the headings, click 'Add Item', type in the Hospital name and click 'Save'.
4. To add to the Departments, Administration, Result or Unscheduled Care lists – Click on relevant heading list, 'Add Item', type in the Department etc.
5. You can select a folder from the list. If the folder you require is not there click on 'Maintain', 'Add', type the name of the folder, select where the folder will go within the existing structure, click on 'Confirm Add', 'Back' and 'Select'. Then click 'Save'.

Document Comments

1. Select 'document Comments' from the list.
2. To add a new comment to the system, click on 'Add'
3. Enter the comment name.
4. Choose whether this comment is actionable or not, then click 'Save'.
5. To edit any existing comments, click on 'Edit'. This allows you to edit the comment and Enabled/Disable the actionable option.

Workflow Recipients

1. Select 'Workflow Recipients' from the list.
2. To add a new workflow group, click on 'Add'. Type in the description of the group, to add a user click on 'Add' if you require multiple users you will need to add each one at a time, click 'Save' once finished creating the group.
3. You can modify any existing workflow group, click on 'Edit'. You can add/remove users or change the order of the user list.

Workflow Views

1. Select 'Workflow Views' from the list.
2. Click Add to create a new view (this example will show you how to look at all workflows within a users in tray)
3. If you wish to make this view available to all users tick 'View is available to all Users' else this will only be available to the user which is currently logged into Docman.
4. Enter the view description i.e. Dr Smith's Inbox.
5. Leave the section's option blank
6. With the status option select 'With a Selected User'.
7. From the picking list select the name of the user who's in tray you wish to look at.
8. leave the rest of the options blank, then click 'Save'
9. This view will now be available from the workflow in tray.

NOTE this is an example of 1 scenario on how to create a Workflow view, it is recommended to test this and see what you can create. The F1 help menu will provide you with a more in-depth guide.

Users

1. Select 'Users' from the List.
2. To create a new user within Docman, click on 'Add'.
3. It is required you fill in the users login and name
4. You can now save the user if you wish, this will just add basic settings for Docman i.e. Filing/Workflow.
5. To change user permissions select the 'Security' tab, edit the user's permissions to what is required.
6. When saving a new user it will ask to enter a temporary password (usually password123) you will be required to change this at first login, so don't set the users password at this point.
7. To modify an existing user, highlight user and click 'Edit'. This will allow you to change the user's password/permissions or lock/unlock a user account.

Administration Module

NOTE – Only users with Administrative rights will be able to access this area. This is accessible via the Main Menu; select the option 'Administer System'.

Synchronize Patients

This will run automatically as part of the Docman auto-backup. However, this option can be run at any time via 'Configuration and Integration'. Once finished, this will inform you of how many patients were added and modified within Docman.

NOTE – It is recommended this option is run from the Docman Server as the machine maybe unusable until the patients synchronize has finished.

Synchronize Readcodes

This option is accessible from 'Configuration and Integration'. This should only need to be done once a month to copy all the codes from your clinical system.

NOTE – It is recommended this option is run from the Docman Server as the machine maybe unusable until synchronize has finished.

Check for New Updates

You will be informed when a new update to Docman is available, by the shield on your Docman main menu. The update requires all users to be logged out of Docman **ONLY** and that the updates are run through on the Docman Server **ONLY**.

A more in depth guide is available on how to process updates:

<http://www.pcti.co.uk/resources/documents/UpdatingDocman7.pdf> or use the f1 help menu.

Configure Workstations

This option is accessible via 'Configuration and Integration'. This feature gives you an overview of which machines have allocated Docman licenses, who is logged on, allows you to remove workstations and set workstations to be scanning/Intellisense machines etc.

Log files

To check these, select the 'System Logs'.

Backup Log - This record's any backups ran within the Docman system be it Manual/Auto.

Deletion Log - This record's which documents have been deleted within Docman and by which user.

Access Log – This record's when user's logged in/out of Docman and on which machine.

Reporting

NOTE – Only users with correct permissions will be able to access either of these options.

Reports Module

NOTE – If you are having any issues with creating a report, there are video tutorials which are located from the Docman Main Menu and 'Tutorial Demos'.

1. Select 'Reporting' from the Docman main menu.
2. Click on 'New'.
3. Select the data set (for this example we will be using 'Patients').
4. Next to where it stats Patients Criteria it will stat 'Showing Inactive Patient's' click on this if you wish for inactive patients to be hidden or show within the report.
5. Click on 'All Patients items'.
6. Here you will be able to enter patient information i.e. Forename, Surname, Reference ID, DOB etc. If you wish to do reports on all patients then leave this section blank.
7. To enter details into any these criteria, click on the white box next to the criteria. Type the details into the value(s) box. Once finished click 'OK'.
8. Click on 'All Documents'.
9. Like the patient section you will be able to enter information on the document data section i.e. filing/event date etc, once finished just click on 'OK'.
10. Click on 'Print Preview'.
11. Click on 'add to layout'.
12. This will let you select the information which will be shown in the report.
13. You will need to do the above multiple times until your report has all the required fields. **NOTE**– Depending on which order you add each field to the report, when you go to generate the report that is how the data will be displayed.
14. Click on 'OK'.
15. Click on 'Run Report'.
16. Once the report is generated, you will be able to save the results. Once saved you can access the report from this location and print.
17. Once finished just click on 'Close'
18. You can save each report created if you wish, this will save you time having to re-create a report, click on 'Save Report to Library'.
19. Click on 'Close'.

User Audit

1. Go into Maintain List>Users>Select user you wish to run the report on.
2. Click on the tab which stats 'User Audit'.
3. Select the date range you wish to run the report on.
4. Choose the workstation you want to run the report on.
5. You can change the user you wish to run the report on or select 'All users', you can not select multiple users.
6. Choose which report you wish to run then click on 'View Report'.
7. Once the report has been processed you are given a few options:
 - a. Save – This will let you save a copy of the processed report, the format can be either Word or HTML.
 - b. Print – This will print a copy to the report.
8. If the report can't find any entries this will come up with a box to inform you.
9. Once finished with the report click 'Close'.