Document Management Quick Start and Shortcut Guide

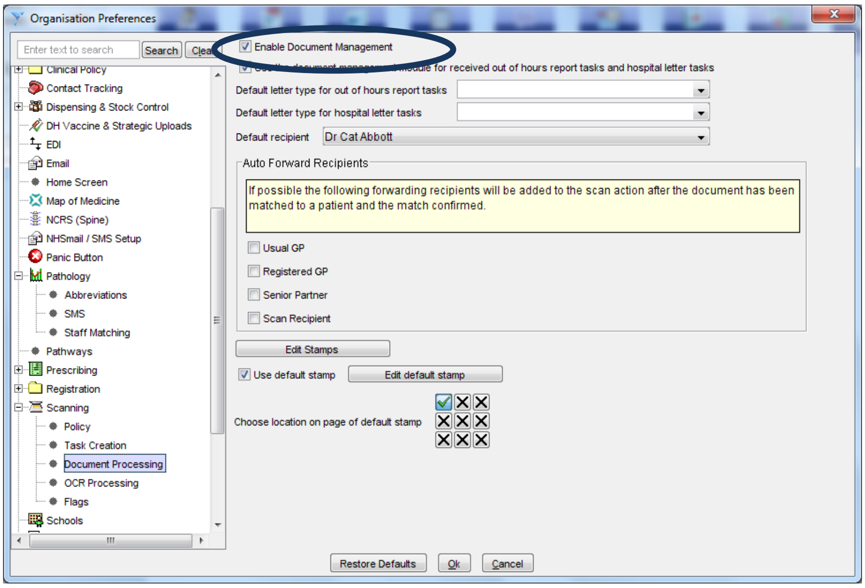
For the attention of SystmOne users:

This document explains the basic Document Management functionality. It is highly advisable that you read the in-detail Document Management Guide before you begin processing patient documents as it contains step by step instructions on what to do.

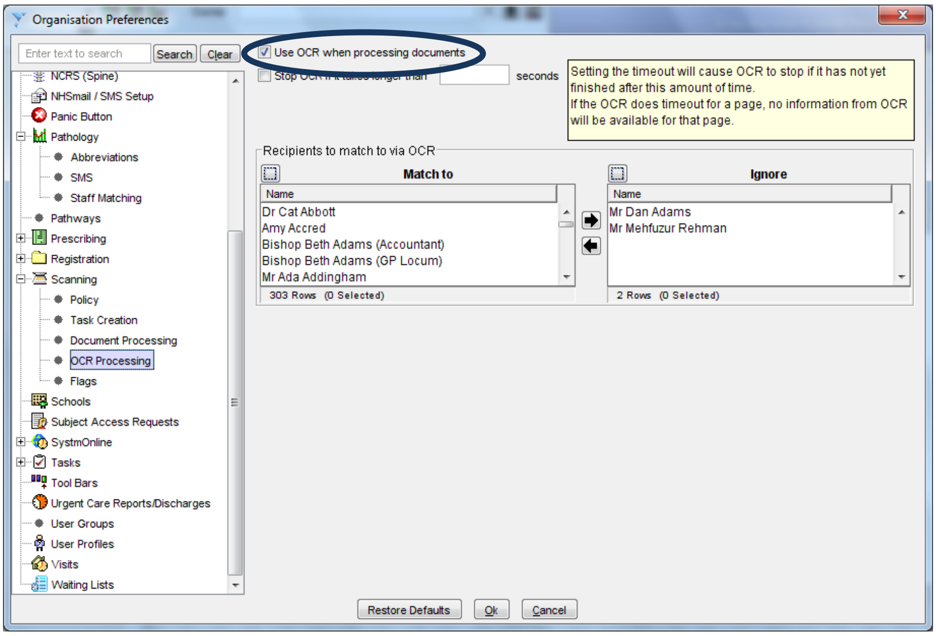
Contents

Organisation Preferences

To enable the new Document Management functionality a system administrator will need to go to Setup > Users and Policy > Organisation Preferences > Enable Document Management. The Document Management functionality will then be available under the Workflow menu (a SystmOne restart is required to view this menu).

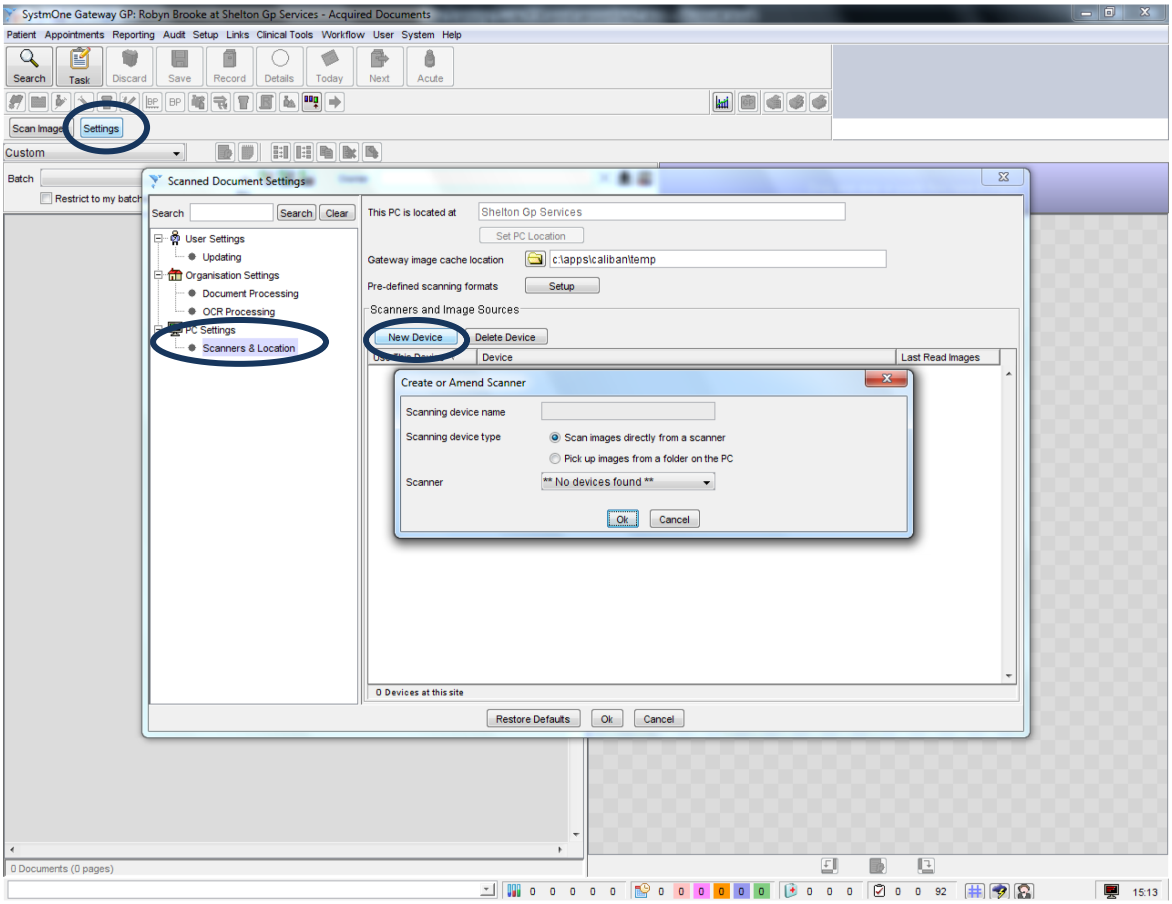


You can then turn on the Organisation Preference for OCR (Optical Character Recognition). To do this go to Setup > Users and Policy > Organisation Preferences > Scanning > OCR Processing and tick the box that says 'Use OCR when processing documents'.



Scanner Setup

To setup your scanner go to Workflow > Document Management > Acquired Documents > Settings > Scanner & Location > New Device.

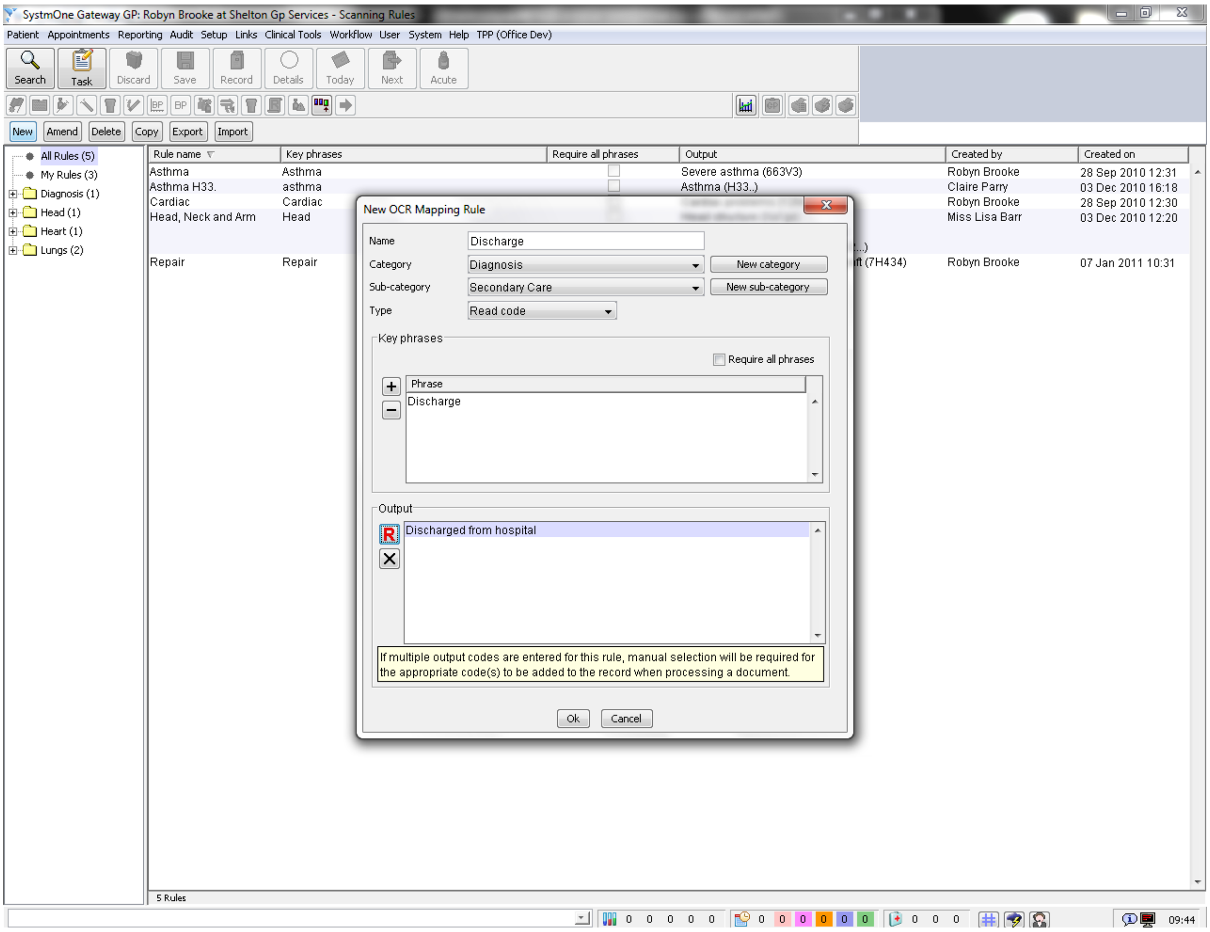


Choose a name for your scanning device and in the drop down bar select the scanner that is attached to your computer and click OK.

OCR Rules

OCR can pick up Read codes from a scanned letter. In order for this to work you will need to set up rules, which will match a word to an associated Read code, e.g. "If you see this word, offer this Read code as a suggestion".

To do this go to Setup > Data Entry > Scanning Rules > New.
Enter a name for your rule, create a new category for it to sit in.



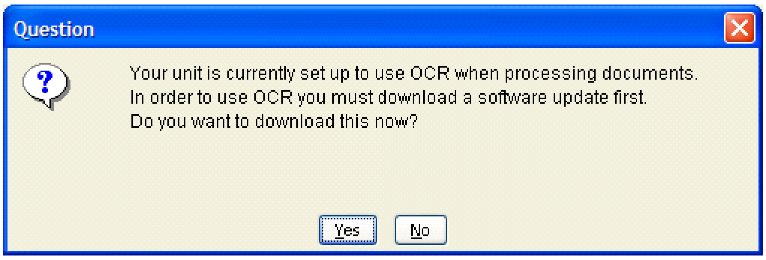
Next to the Phrase dialog, click on the plus button and enter the word or phrase that you want OCR to look for in a scanned letter (e.g. Discharge).

Under Output click on the Read code button, which will launch the Read code browser, and then search for a Read code that you want OCR to match to the phrase above (e.g. 8HE.. Discharged from hospital). You can enter up to 4 phrases in the Phrase field and up to 50 Read codes on the Output field.

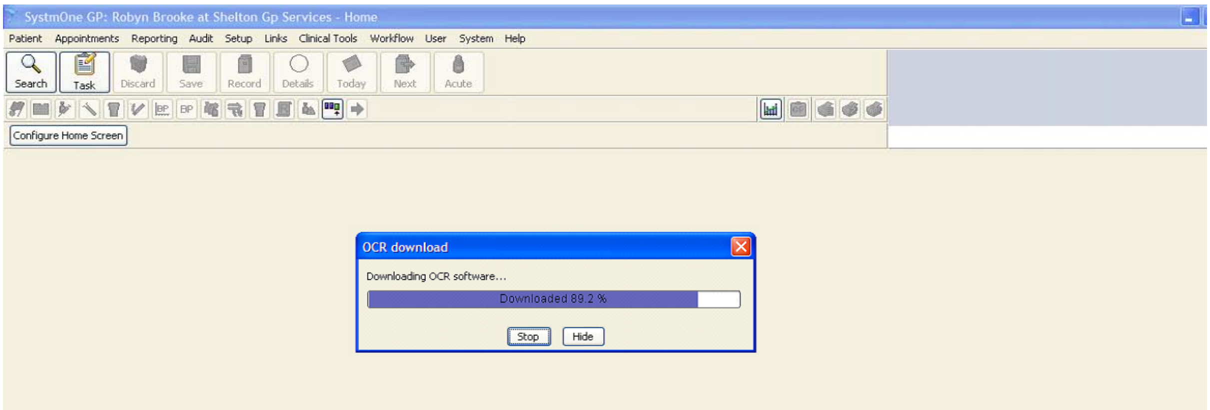
If you tick the box that says 'Requires all phrases', any phrases that you have entered must all be present in the scanned letter in order for the Read code to be suggested.

OCR Downloading

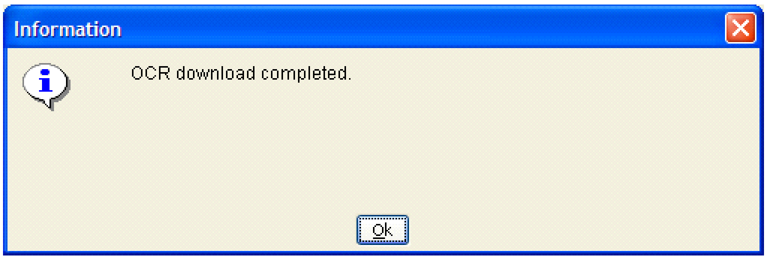
If this is the first time you have used Document Management, the OCR software will need to download to your computer.



The 'loading' bar will display clearly on the Acquired Documents screen and will take a few minutes to complete. You can hide the OCR download by selecting Hide, this will allow you to continue working.

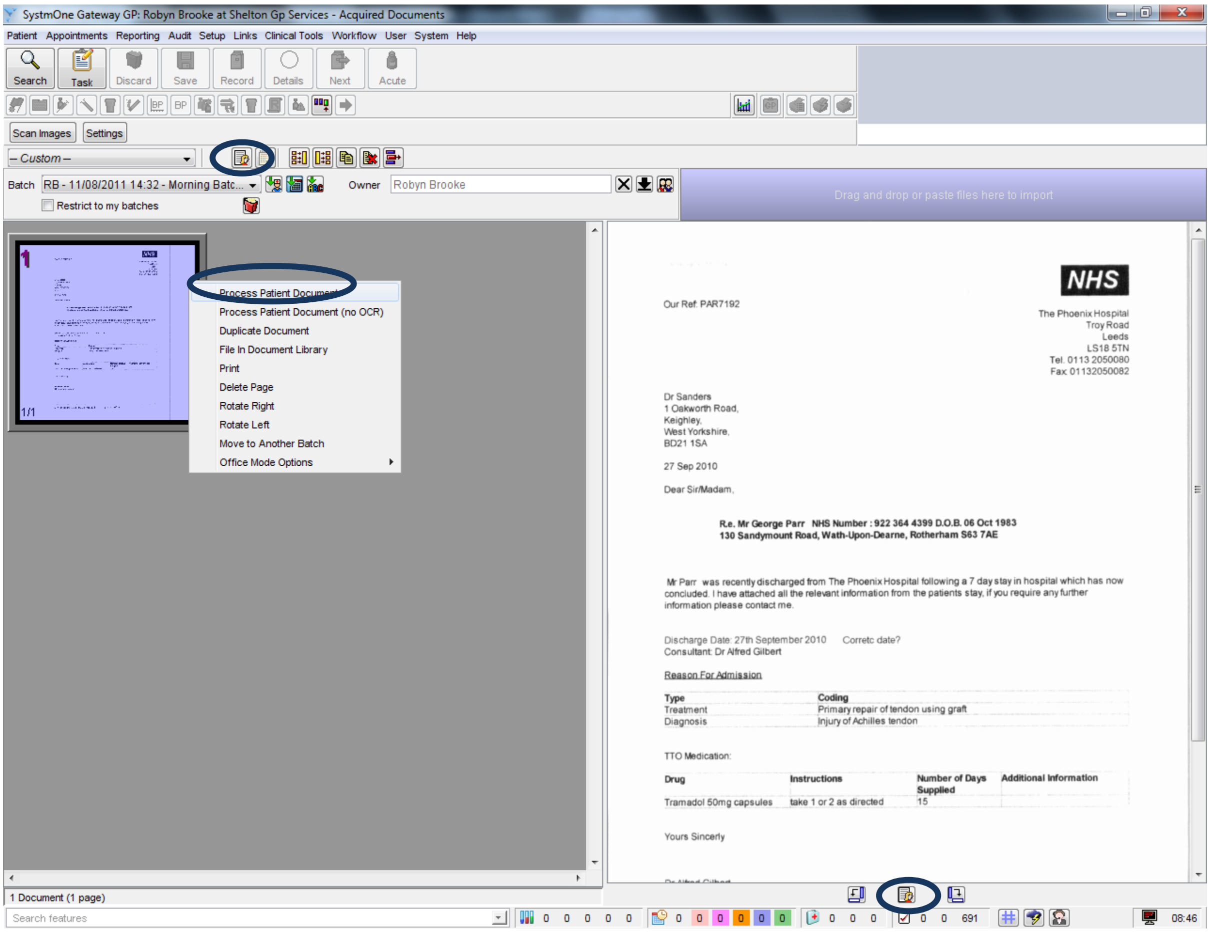


OCR has only finished downloading when you see the Information box.



Processing a document

If you want to process a document to file to a patient record then you can either click the 'Process the selected document as a patient document' icons or use the right click option to Process Patient Document.



You will then be taken to the Scanned Document Update screen.

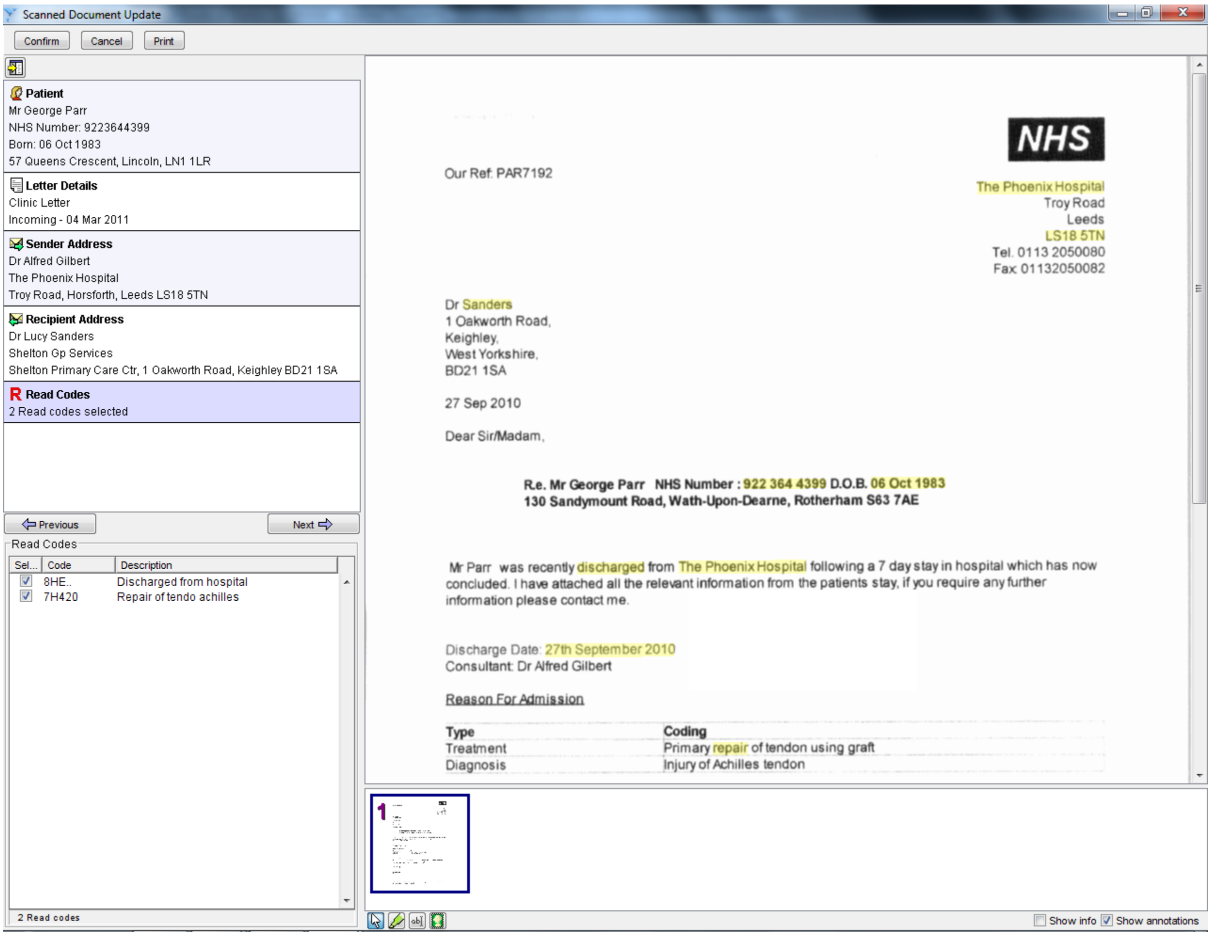
The Scanned Document Update screen displays the results from the OCR and the rules you have previously set via the Scanning Rules screen. These results are shown on the left side of the screen.

OCR will attempt to match the following on this screen;

1. Match the patient in the letter to a record on SystmOne using their NHS number, date of birth and surname.
2. Match the letter details to any Letter Rules that have been previously set up in Scanning Rules. You have the option in the panel below to mark the letter as either Clinically Relevant or Admin Event. This will then display in the New Journal.

3. Match the sender details from your Address Book; this will need to be kept up to date in order for the functionality to work to its full potential. OCR will also attempt to match the recipient details from the F4 Directory.
4. Match the Read codes to the OCR Rules set up previously in Setup > Data Entry > Scanning Rules. You can remove a Read code by deselecting the box at the bottom of the screen.

Using the tool bar at the bottom of the screen you can annotate, highlight and add stamps which were created in Organisation Preferences, to the scan.



Once you have added all the information you require select the Confirm button.

By selecting confirm, you are confirming that you are happy with the following:

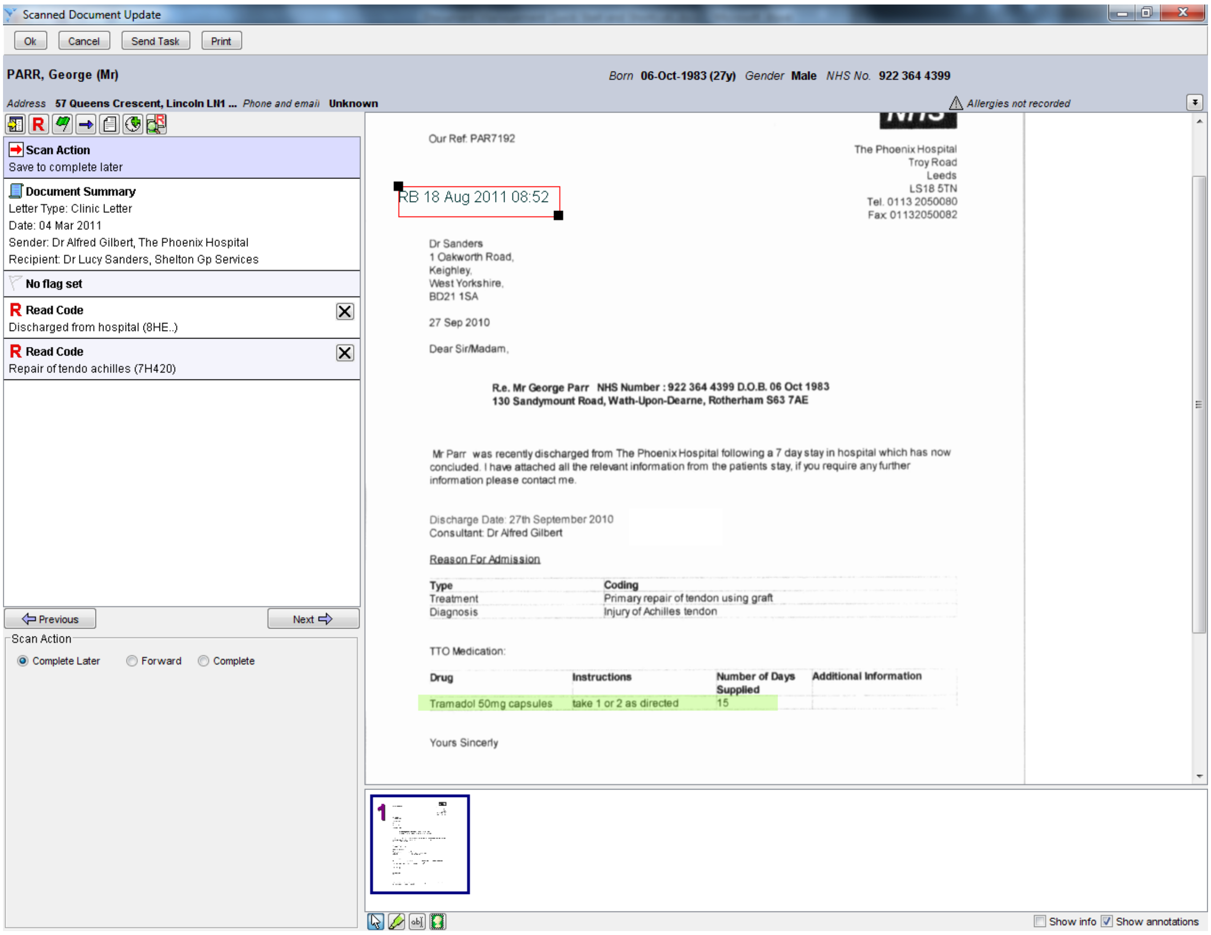
1. Sender and recipient addresses
2. Layout – e.g. quality and positioning of the scan

These details, with the exception of the Read Codes, will then be saved to the patient record into the Communication and Letters node so they must be correct. You will be able to add or alter Read Codes at a later stage.

After pressing Confirm, you will be automatically taken to the second Scanned Document Update screen.

This screen gives you the option to do the following:

1. Add Read codes
2. Add problems
3. Link to referrals
4. Add notes (these notes will go into the New Journal)
5. Record an activity
6. Send a task
7. Run OCR again manually on the document (this applies if the member of staff who originally processed the document was restricted to Read code formularies)
8. Assign a flag to indicate the importance.



What to do next:

Click on Scan Action at the top of the screen.

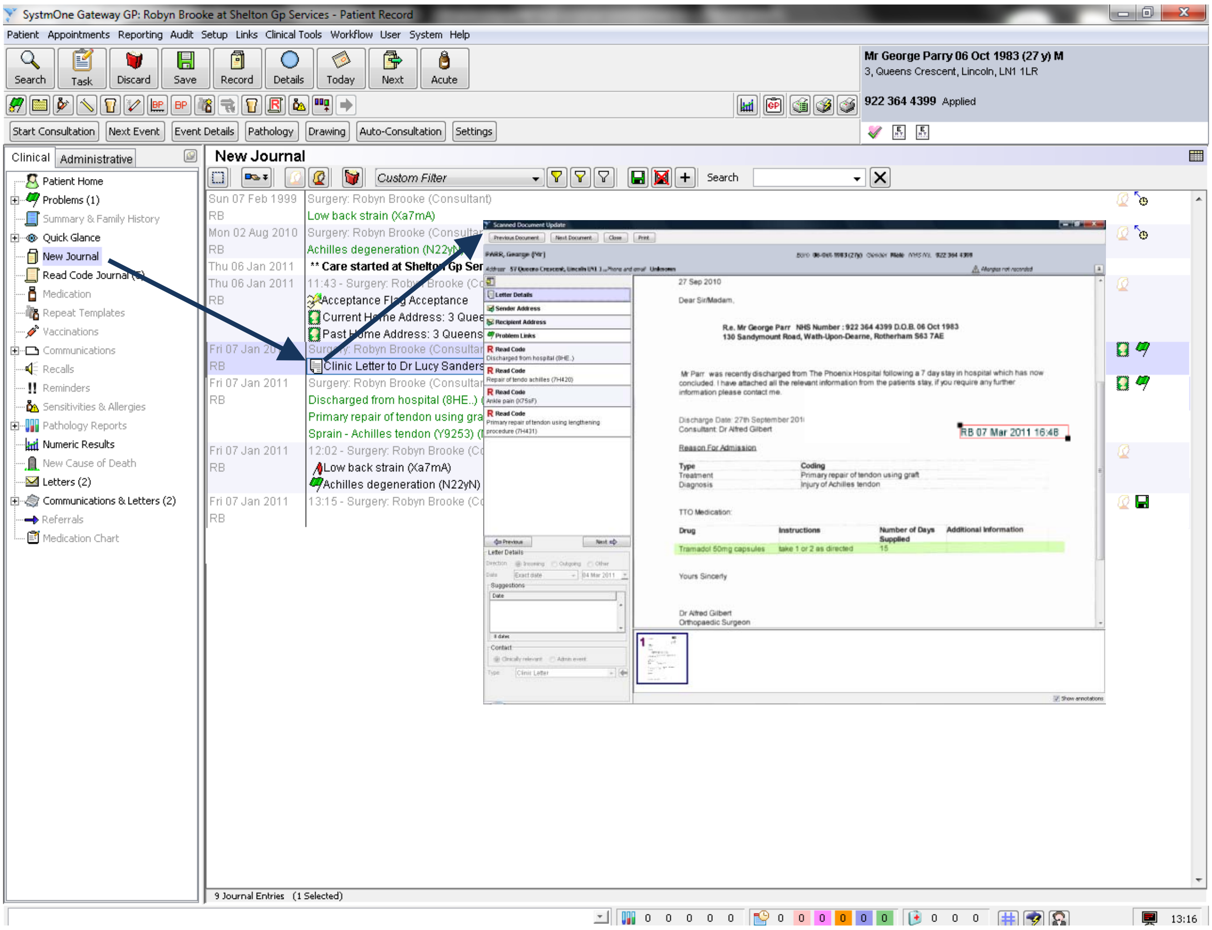
If you have selected a User Preference the Scan Action will be defaulted to the preference you have chosen. If you have not selected a particular User Preference then it will default to Complete Later. In either case you can change the Scan Action manually.

Under Scan Action you have the following options:

1. Complete Later - By choosing Complete Later you are saving the work you have. You can pick it up again on the Documents Inbox screen.
2. Forward - Forwarding the scan give you the ability to pass it along to another member of staff to work on. That staff member can then view the document from their Documents Inbox.
3. Complete - Completing the scan means that all the problems, Read codes and notes etc will be filed to the patient record in the New Journal. You can also send a task at this point by using the Send Task button at the top of the screen.

Viewing scanned documents in the Patient Record

After marking the document as Complete, all the details entered will be filed to the patient record. The scanned document can be viewed by right clicking on the letter image in the New Journal.



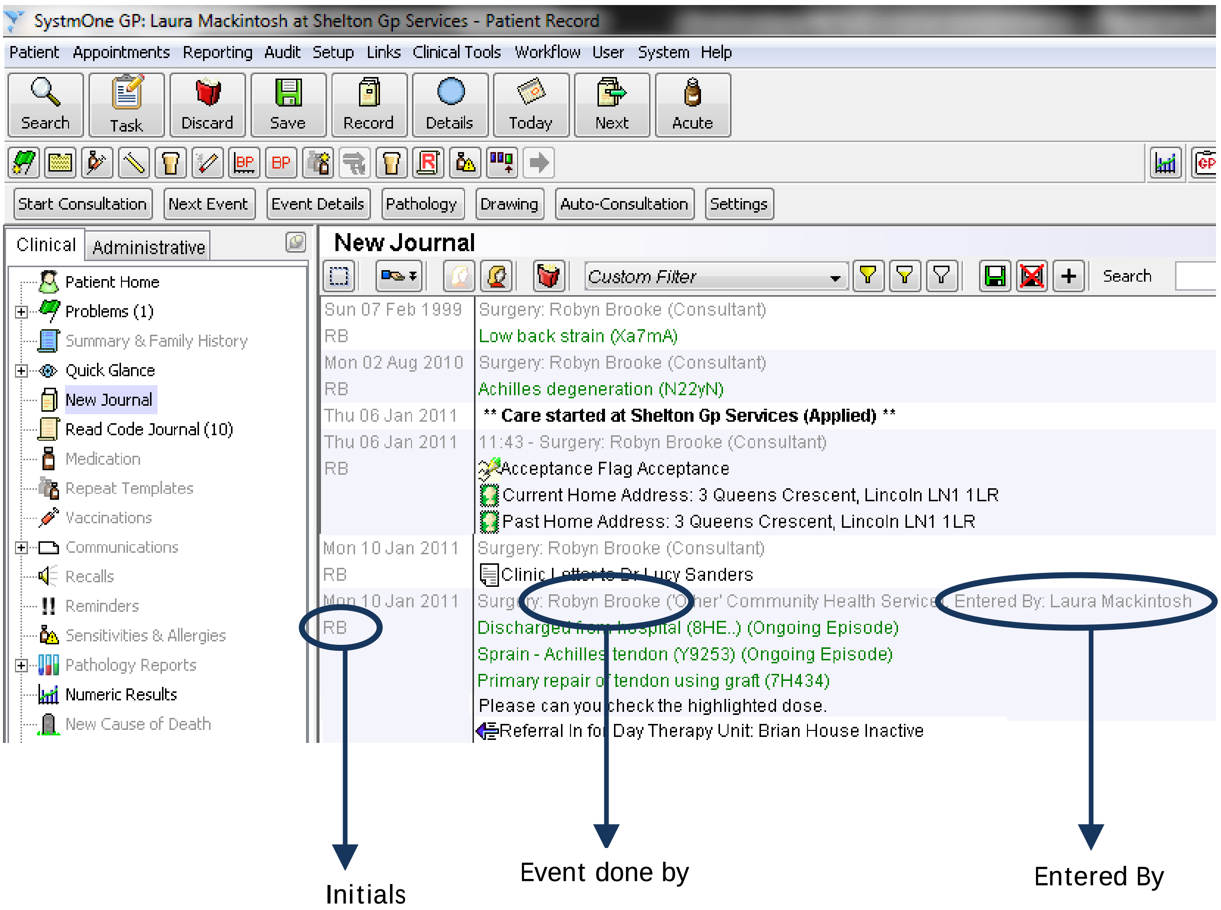
The document can also be viewed from the Communication and Letters node by right clicking and selecting View letter. On this right click you also have the option to save the letter to your computer.

In the New Journal you will be able to see who has entered specific information to the scanned document such as Read codes, Problems and who has filed the completed scan to the Patient Record. This is detailed below.

Entered By This will always show who filed the completed scan. i.e. the person who is responsible for the information appearing in the record (not necessarily the person who recorded the information).

Event Done By This shows the staff member who has recorded the information contained in the consultation. i.e. the person who used the Document Management functionality to add the Read codes.

Initials The initials that appear for any consultation created when an image is processed and subsequently completed, will always show the initials of user who initially confirmed the letter to the record.



Keyboard Shortcuts

(Ctrl+C) - will copy your image.

(Ctrl+V) – will paste your image into the selected area.

(Ctrl+A) - will highlight all the documents in the batch.

(Ctrl+Enter) – will process the patient document from the Acquired Documents screen.

(Shift+ up arrow/down arrow) - Move up and down though the sections on the Scanned Document Update screen.

(Ctrl+N) – will take you back to Acquired Documents screen.

(Alt+R) – will add a Read code to the document on the Scanned Document Update screen.

(Alt+P) – will add a problem to the document on the Scanned Document Update screen.

(Alt+F) – will add a link to a referral to the document on the Scanned Document Update screen.

(Alt+N) – will add a note to the document on the Scanned Document Update screen.

(Alt+A) – will add activity details to the document on the Scanned Document Update screen.

(Alt+Z) – will prompt OCR to 'read' the document.

(tab) - will move the cursor around the screen.

FAQs

Q: OCR is quite slow, what can I do?

A: OCR is a separate piece of software which is integrated into SystmOne. Providing you have set up OCR rules, have an organised Address Book and the letter is scanned in correctly, OCR will be accurate. However, some documents will take slightly longer than others due to their size and content, and the first page will always take the longest especially if it is detailed. TPP also have to consider speed vs. quality when developing OCR as you cannot add without taking away.

Network speed can be a contributing factor to the speed of OCR. You can contact your Local IT service desk and ask them to investigate the cause of the network slowness.

There is an Organisation Preference which will allow you to stop OCR if it takes longer than X seconds. This may be useful if you have a large document and only want the first few pages processed with OCR.

Q: When scanning I receive an error message saying, "'you cannot scan more images until the previous batch finishes". What does this mean?

A: This indicates that your scanner drivers need updating. You will need to contact your Local IT service desk and ask them to update the scanner drivers.

Q: Why can't I process my batch on the Acquired Documents screen, everything is greyed out?

A: You need to be the batch owner in order to work on a document. To do this you either need to assign yourself as the batch owner when the document is scanned in or you can assign yourself as the owner from the Acquired Documents screen using the down arrow.

Q: Where's my document? It's not in the patient record.

A: The most common cause of 'lost' documents is that the Scan Action on the Scanned Document Update screen has been set to Complete Later. This means that your document will still be assigned to you and can be found in the Document Inbox. You can also search on deleted, completed scans and by all staff members to widen your search.

Q: Where are the notes I entered during the workflow?

A: There are 2 types of notes on the Scanned Document Update screen. The first is a note which will display in the New Journal. This can be added using the notes icon located in between the referral and activity icon. The second is a forwarding note which will display on the Documents

Inbox in the Notes column. This can be added when you choose to forward the document to another staff member and add your forwarding notes in the space below their name.

Q: How do I add more letter types to for Document Management?

A: Letter types are a configurable list. You will need to contact your Organisation Group owner and ask them to create the new option you would like. You can find out who your Organisation Group owner is by going to the Organisation Groups screen, tick the box which says, 'Only show groups this organisation has joined' and then look for the field called 'Group Owner'.

Q: Is there an audit for Document Management?

A: Yes, there are a number of small audits which will tell you what has been done during the workflow and completion of the document.

The Document Search/Document Inbox screen – By using the 'View Updates for Document' right click option you will have a clear audit of who has been forwarded the scan, at what date time and with any forwarding notes.

Patient record – When you view the letter from the patient record and tick the 'View Info' box on the bottom right of the screen you will be shown who has annotated the document along with the date and time.

New Journal consultation – 'Entered By' will always show who filed the completed scan, i.e. the person who is responsible for the information appearing in the record (not necessarily the person who recorded the information).
'Event Done By' shows the staff member who has recorded the information contained in the consultation, i.e. the person who used the Document Management functionality to add the Read codes.
Initials - The initials that appear for any consultation created when an image is processed and subsequently completed, will always show the initials of user who initially confirmed the letter to the record.

Q: Some of my scans haven't uploaded to the server yet. What can I do?

A: The most common cause for stuck images is that the gateway PC has changed since the image was scanned in, it is very important that you allocate just one PC as your gateway.

The PC which was the gateway at the time the image was scanned will need to be restarted so that the image is drip fed to the server. To find this out you will need to do a little detective work:

1) Go to the Uploading Document screen and find the date and time that batch was created;
2) Go to the User Logins screen and run the report for the batch date,
3) Order the column for 'gateway client' so that the ticks are together,

4) Now match the date and time the batch was scanned to the gateway PC during that same time period.
5) Make a note of the PC ID and the staff member who was logged onto it that day,
6) Now you have to find out which PC that staff member was logged onto (pressing shift + F12 on the keyboard in SystmOne will display the PC ID).
7) Restart that PC as the gateway until the image has been fully saved to the server but don't forget to return to the usual gateway PC afterwards.