Document Management Set Up Guide

For the attention of SystmOne users:
This document explains how to setup the Document Management functionality.

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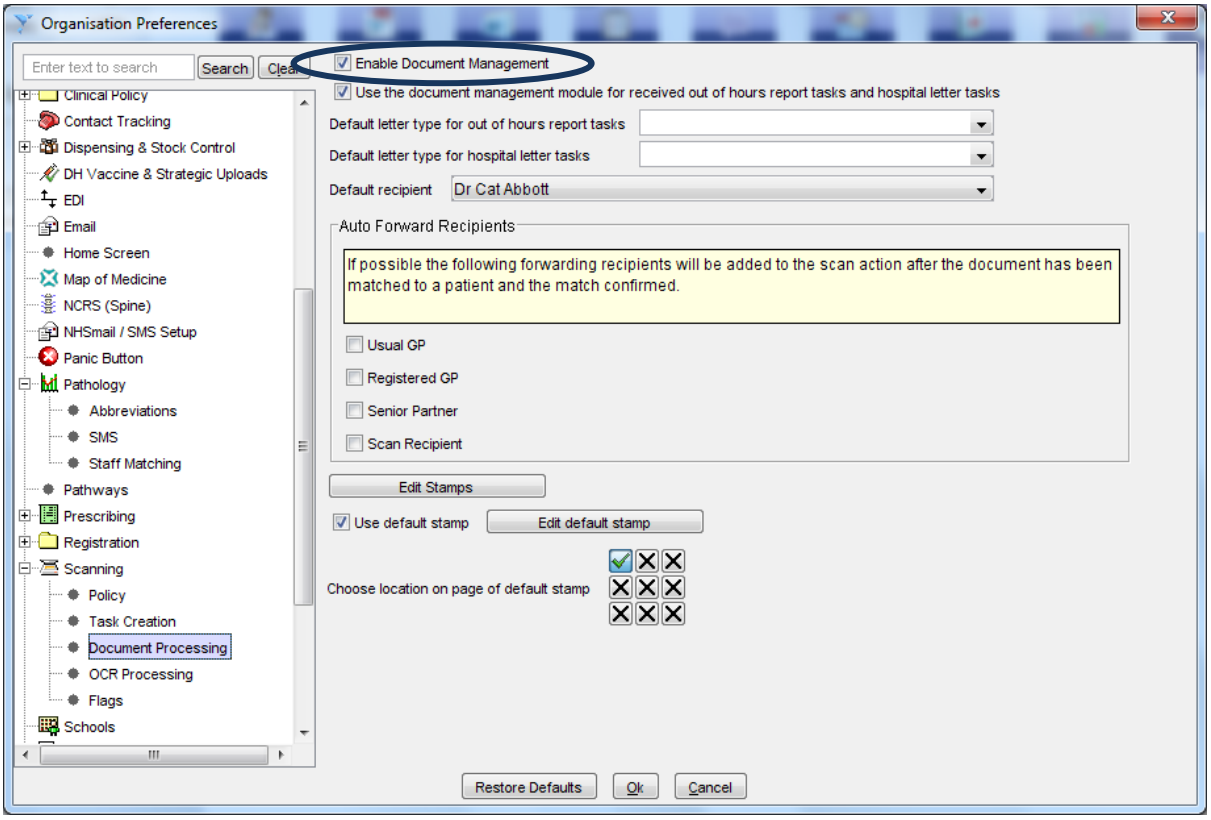
Organisation Preferences Setup - Enabling Document Management

In order to enable the new Document Management functionality a System Administrator will need to go to Setup > Users and Policy > Organisation Preferences > Scanning > Document Processing > Enable Document Management. The Document Management functionality will then be available under the Workflow menu; you will need to restart in order to view the new functionality.



On this screen you have the following options;

1. 'Use the Document Management module for received out of hours tasks and hospital letter tasks' – This means that when you action one of the tasks it will appear in either the 'Electronic Documents' or the 'Out of Hours Reports' batch on the Acquired Document screen.

2. 'Default letter type for hospital letter tasks and out of hours report tasks' – You can create your own letter types so that when you process the hospital letter task, the type is automatically displayed in the letter details section. You can add new letter types by selecting 'Configure List' from the bottom of the drop down list.

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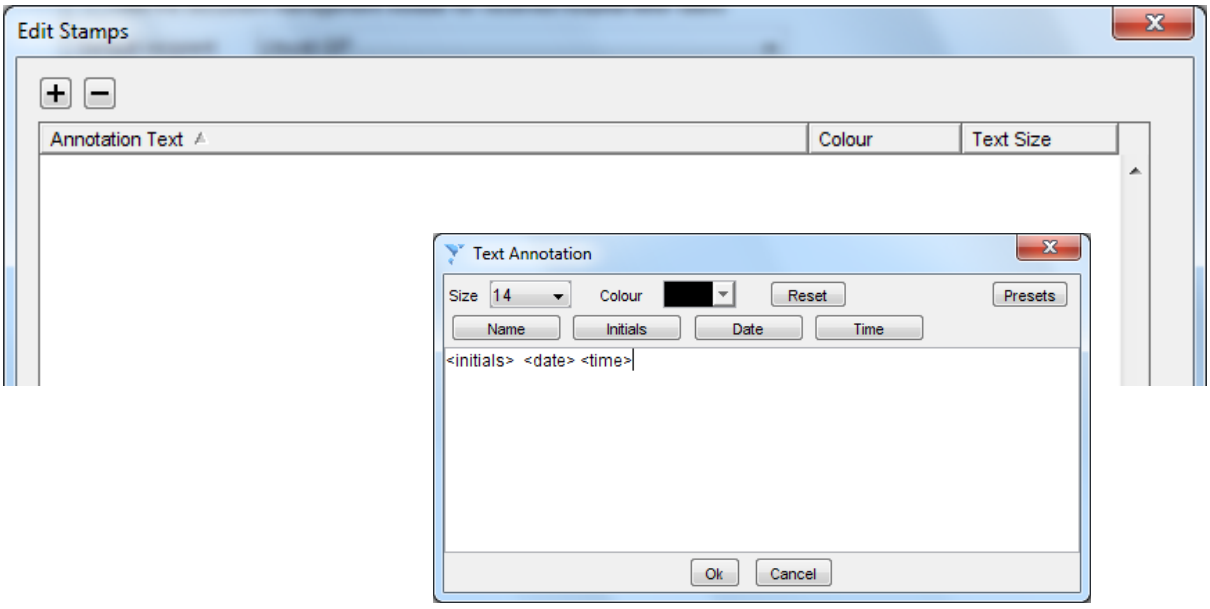
3. Set a Default recipient for your organisation using the drop down bar at the top of the screen. This can be set to a specific staff member, Registered GP, Senior Partner or Usual GP for the patient. This becomes relevant when you are processing a scan; you will be able to click a button, which will enter your default recipient as the sender or recipient of the scan.

4. Select 'Auto Forward Recipients'. Auto Forward Recipients can be selected so OCR will attempt to automatically select the recipient and forward the scan to them. E.g. A letter is addressed to Dr Smith who is the patient's usual GP, OCR will detect this and select Dr Smith as someone to forward the scan onto.

5. Create organisation stamps. Stamps can be used to automatically put administration information, such as the date and time onto a scanned letter as an annotation. You can create a default stamp which will be used by everyone who scans at the unit. You can also choose the location on the scanned letter where the default stamp should display using the stamp location buttons.

   To set this up click on Edit Stamps and select the + button.



You will see the Text Annotation dialog where you can select which stamps you want to use. When you process a document, the stamps that you have chosen will be available on the annotation tool bar at the bottom and the default stamp will display automatically on the scanned letter.

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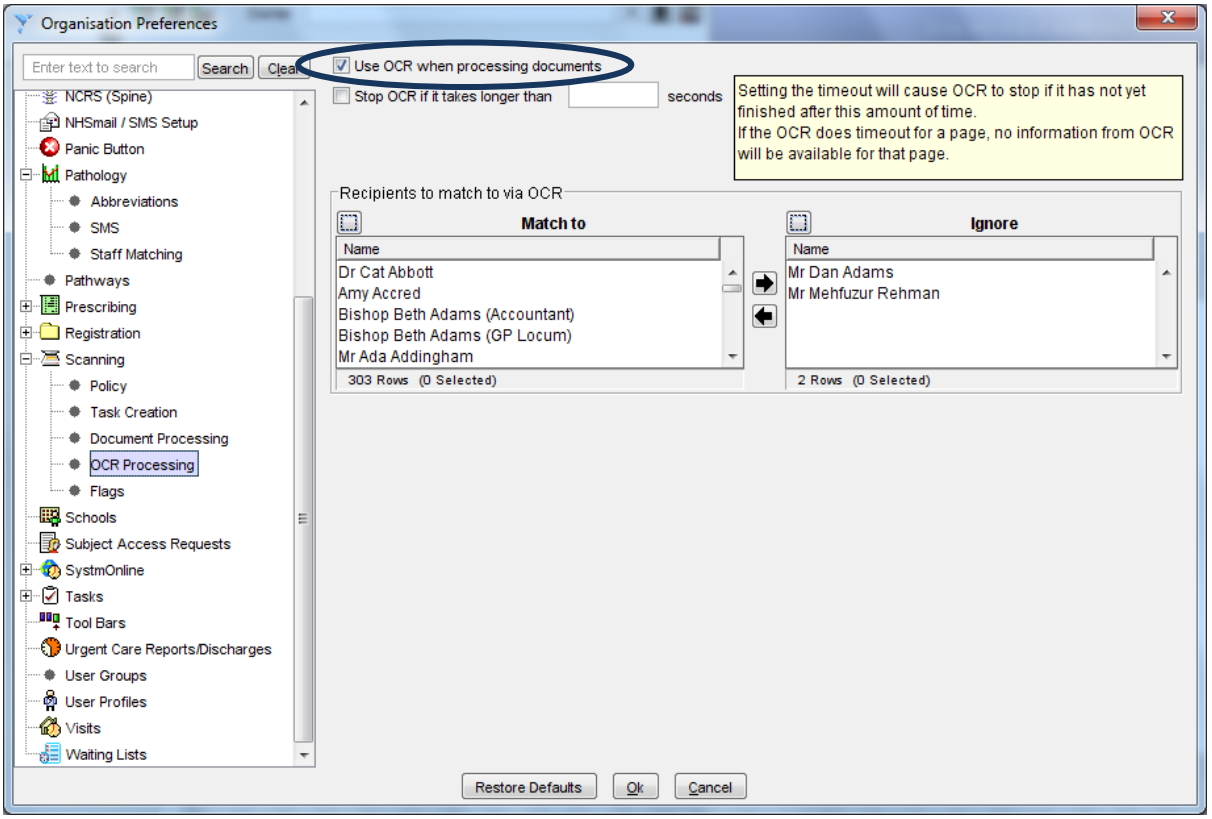
Organisation Preferences Setup

In order for your document to undergo the automatic matching for patient, address details, letter type and date and Read codes you will need to turn on the Organisation Preference for OCR (Optical Character Recognition). OCR is a new piece of functionality which reads the scanned document and attempts to automatically populate the information into the correct fields. This will save you time when processing a document.

1. To turn on OCR go to Setup > Users and Policy > Organisation Preferences > Scanning > OCR Processing and tick the box that says Use OCR when processing documents.



2. If you have a particularly long document but you only want the first few pages to be processed using OCR you can enable the timeout feature that will stop OCR looking at the rest of the document after the specified time.

3. There is a preference to decide which staff members OCR should ignore when attempting to match to a recipient and this has been added to allow users to stop specific staff members from being suggested. This may be required in the case of two members of staff at one organisation having the same surname and only one of them is likely to be a document recipient. To set this preference, select the

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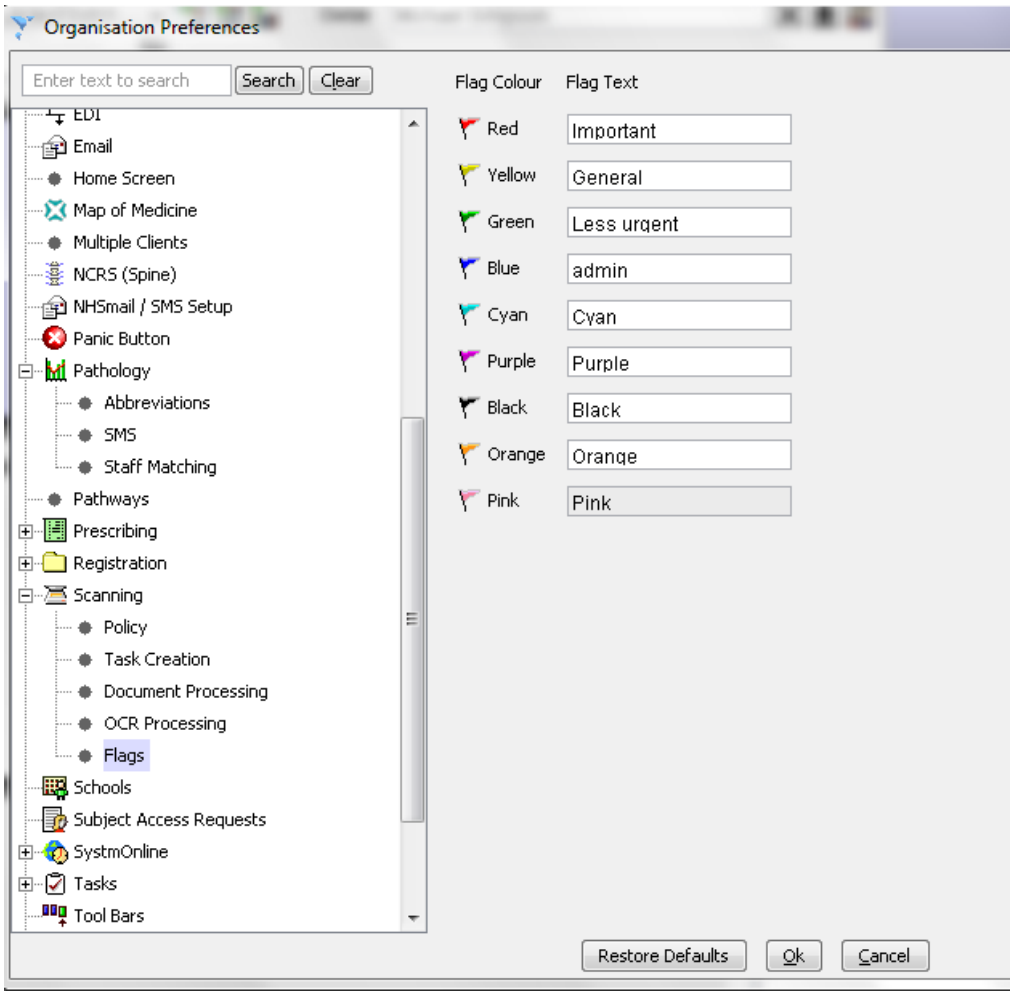
member of staff you want OCR to ignore and move them into the Ignore section. This will mean that OCR will never pick up that person's name from a scanned document.

4. You can configure the names of flags which are to be used in Document Management and can be assigned during the workflow process on the Second Document Update screen and the Documents Inbox. Flags can be used to flag important letters or letters that need something specific flagged against them.



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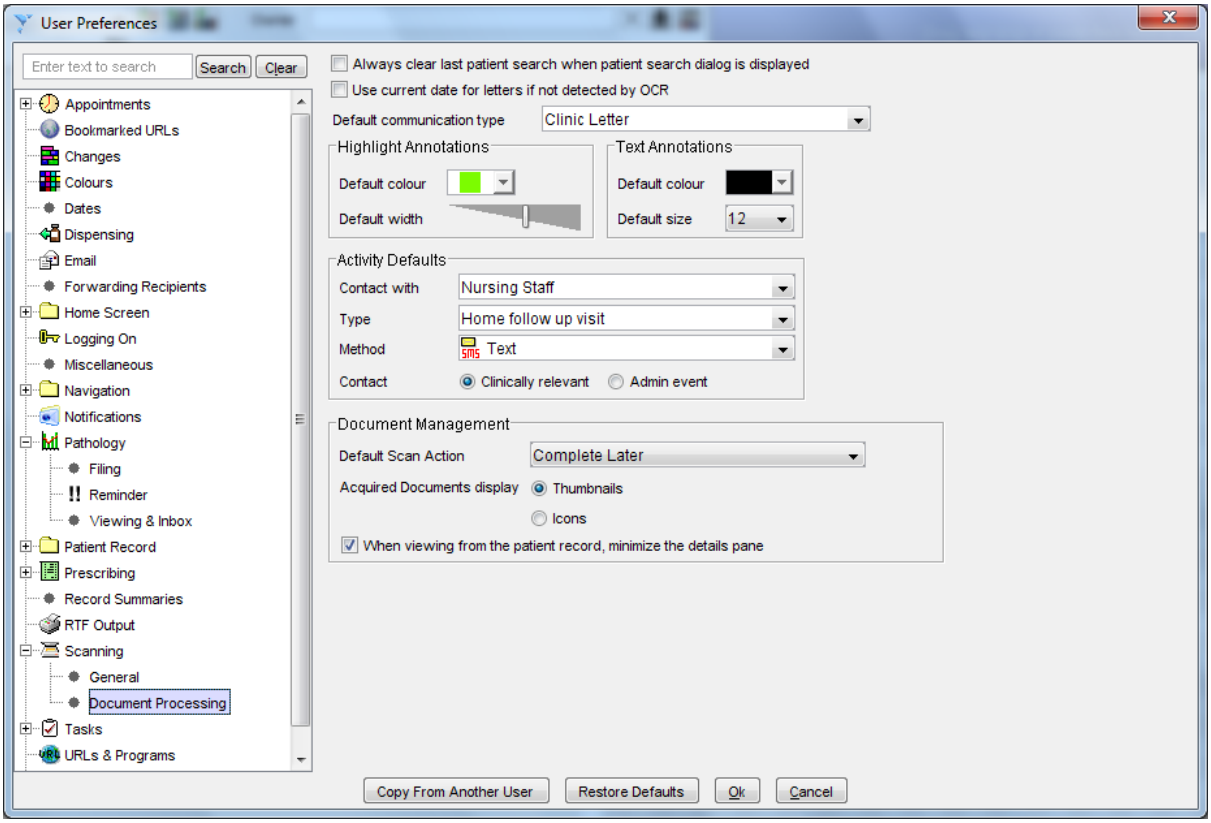
User Preference Setup

To set your User Preferences for Document Management, go to User > User Preferences > Scanning > Document Processing.



On this screen you have the following options;

1. You can select to always clear the last patient search when the patient search dialog is displayed; this means that if you search for a patient the last patient you retrieved will not show.

2. You can select to always use the current date for scanned letters if a letter date is not detected by OCR.

3. You are able to set your default communication type for scans from the drop down bar, if you leave this blank then you will be asked to pick a letter type later when you process the document. If you choose a default communication type then it will be used when you process your scan and you will not receive any validation asking if it is correct. The communication types can be configured by your Organisation Group owner. If you have set up Letter type rules from the Scanning rules screen, they will take precedence over any communication types you set here.

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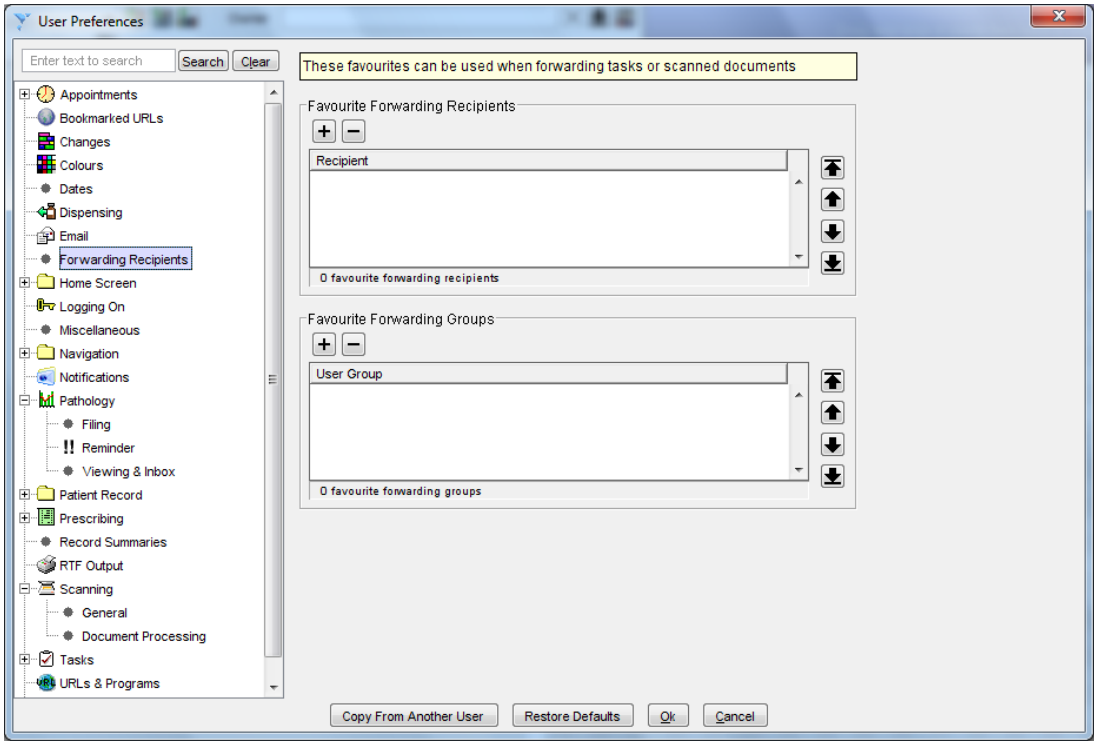
4. You can change your highlight and text annotation colours and set your Activity defaults which you can use during the workflow process later.

5. You can set your Default Scan Action from the drop down bar which gives you a choice of Forward, Complete or Complete Later, this allows you to default your Scan Action to what you will do most often.

6. You have the option to choose how you want to display your scans on the Acquired Document screen; thumbnails or icons. Thumbnails will be larger and will display the letter itself, whereas the icon is smaller and will not show the letter.

7. There is a tick box that will allow you to decide how you want to view scanned letters from the patient record. If you tick the box, when you view the letter from the patient's record you will see the letter with the details pane minimised (but you will be able to view the pane by clicking on the yellow tab on the left hand side). If you untick the box then you will see the letter and the details pane together (this can be minimised by clicking on the yellow tab). The details pane contains information such as Read Codes, Problems and Notes.

8. Favourite Forwarding Recipients are used as a quick way of book marking who you most commonly forward scans to. There is a separate node in the User preferences tree for this as it can be set up for either Document Management or Tasks. Click on the + button to bring up the list of staff/groups and then select the person/group you want. Alternatively, you can multi select staff by holding Ctrl.



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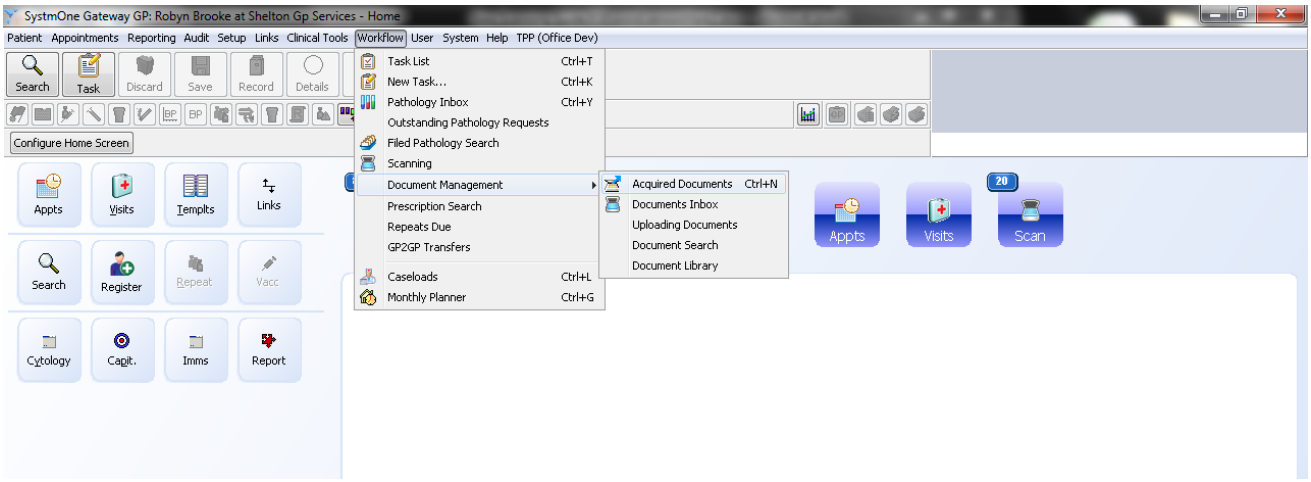
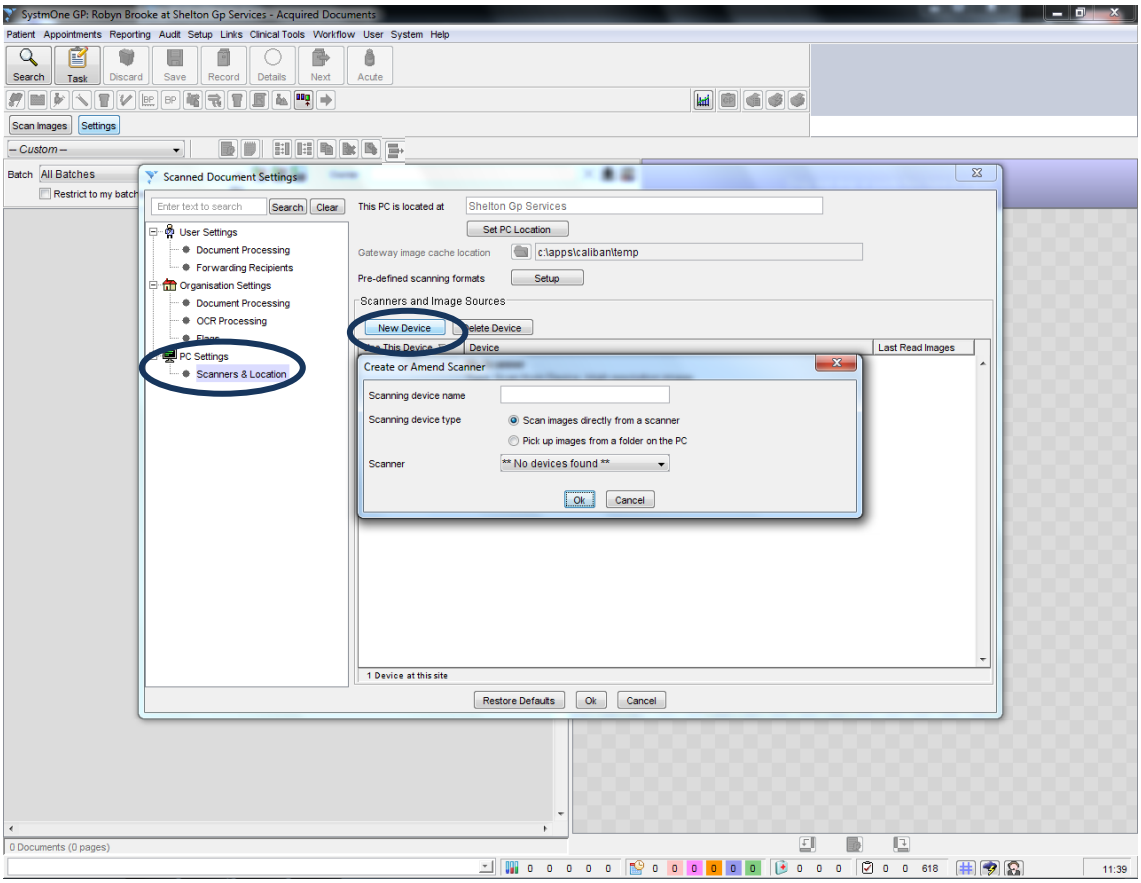
Scanner Setup

1. To setup your scanner go to Workflow > Document Management > Acquired Documents.



2. Go to Settings > Scanners & Location > New Device.



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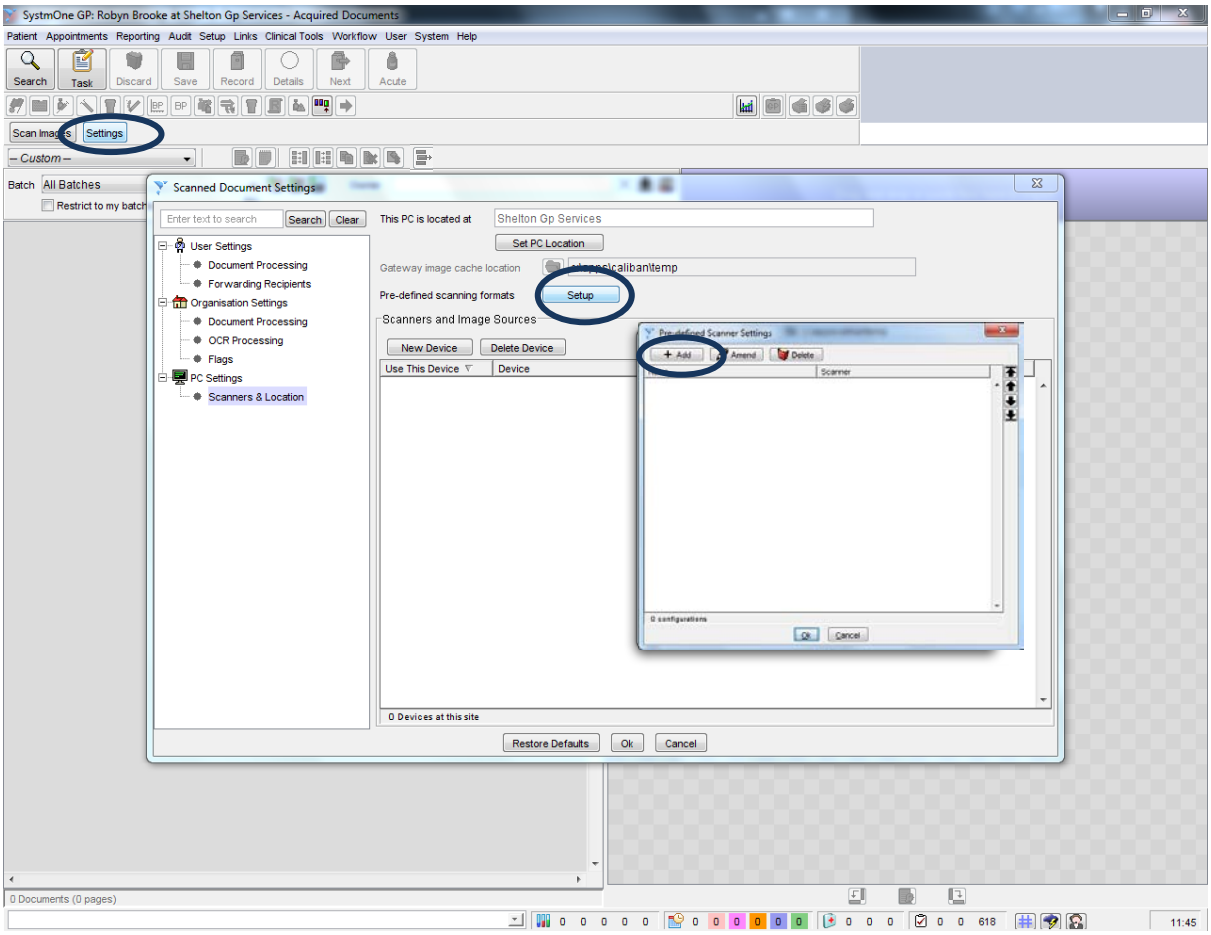
3. Choose a name for your scanning device and in the drop down bar select the scanner you want to use (this must be attached to the PC).

4. Alternatively, you can choose a source folder from your computer to pick up scans. This is done in the same way as above except you choose 'Pick up images from a folder on the PC' and then select the source folder from which you want to collect documents from.

Scanner settings can now be pre-configured to allow you to scan different letter types without having to reconfigure the scanner settings every time.

1. Click on the button Settings >Scanners & Locations > Setup > + Add



2. Enter a name for your scanner setting, i.e. Colour or Black and White.
3. Select Adjust Settings and choose the settings you would like.

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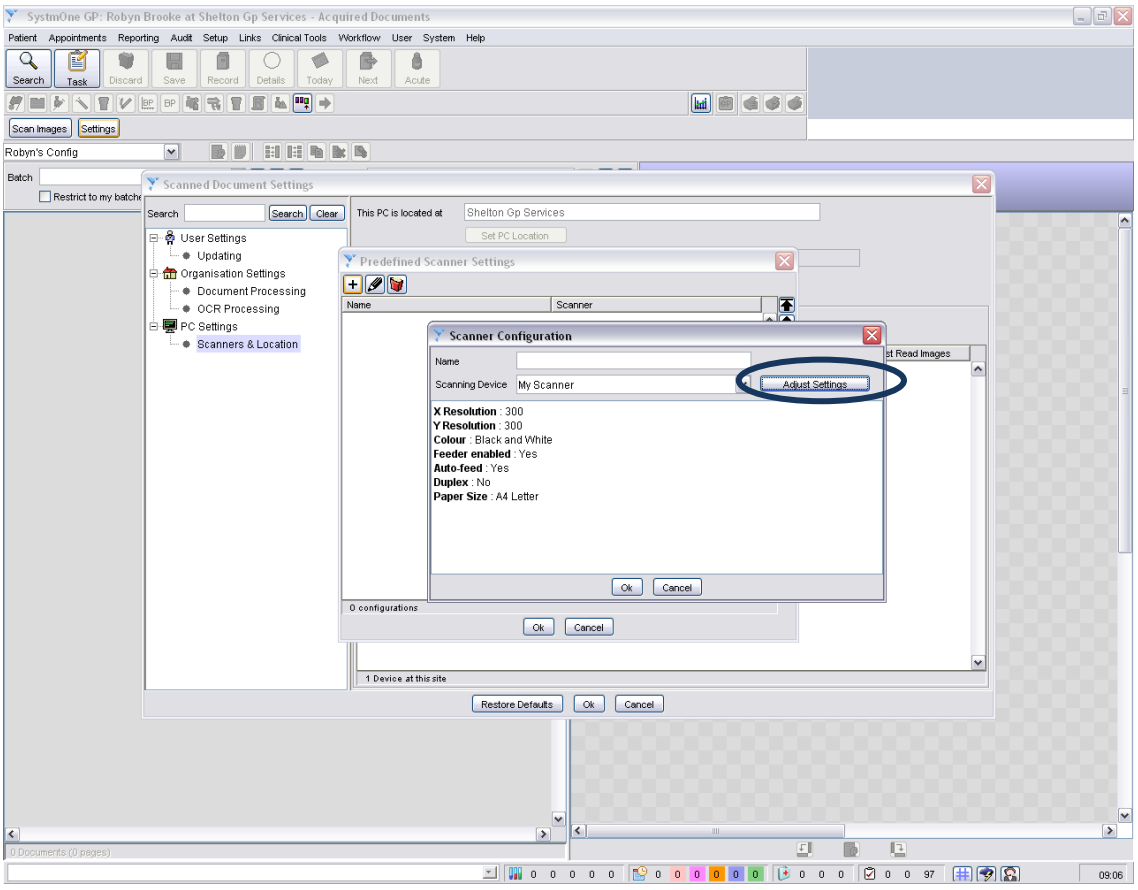
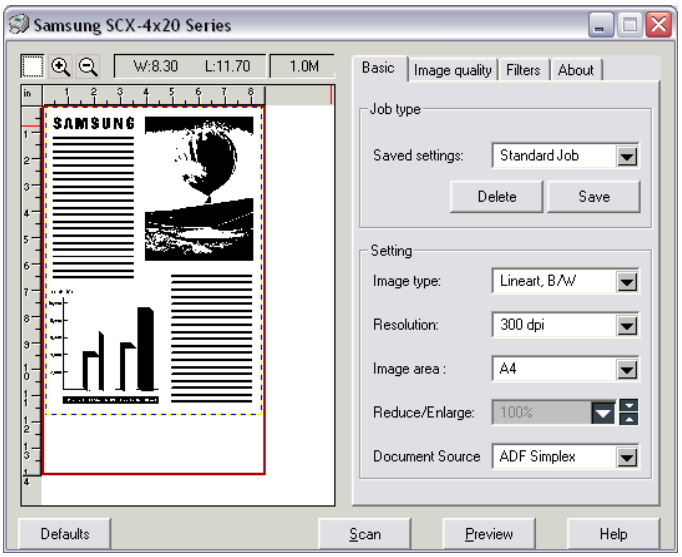


The dialog below is for a Samsung scanner so your settings may look slightly different to this.



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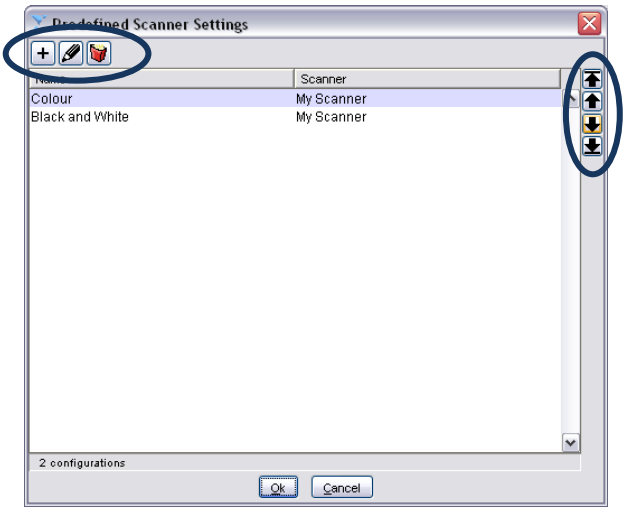
You can move your scanner setting up and down so that the first option in the list is the one most frequently used. You can also amend any of your setting using the buttons at the top of the screen



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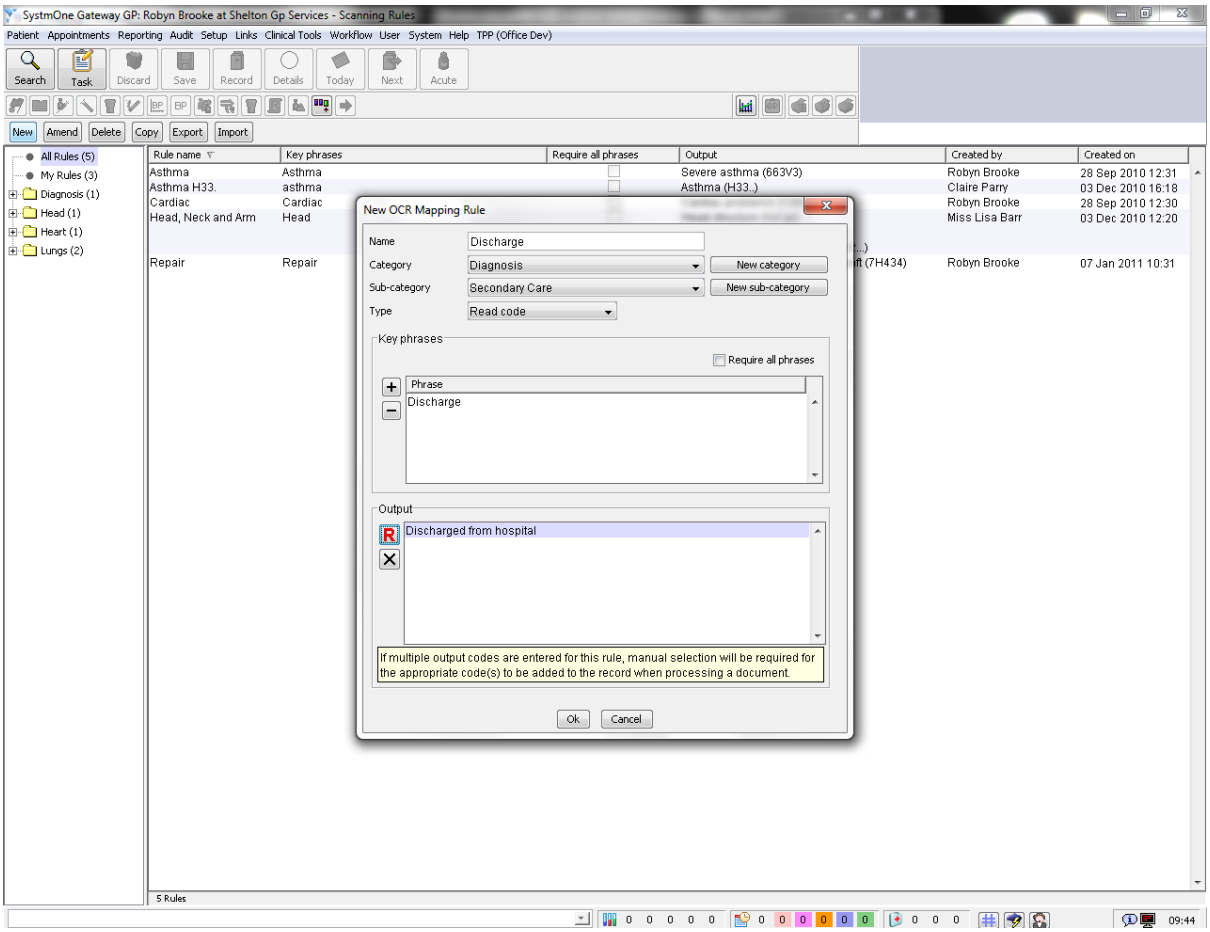
OCR Rules

OCR will pick up the letter type and Read codes from a scanned letter. In order for this to work, before you start processing documents, you will need to set up rules which will match a phrase to an associated Read code or letter type, e.g. “If you see this phrase, offer this Read code as a suggestion”.

To setup a rule to suggest Read codes:

1. Go to Setup > Data Entry > Scanning Rules.
2. Click on New.
3. Enter a name for your rule, create a new category for it to sit in and if you want, a new sub-category.
4. Set the Type to Read Code.



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

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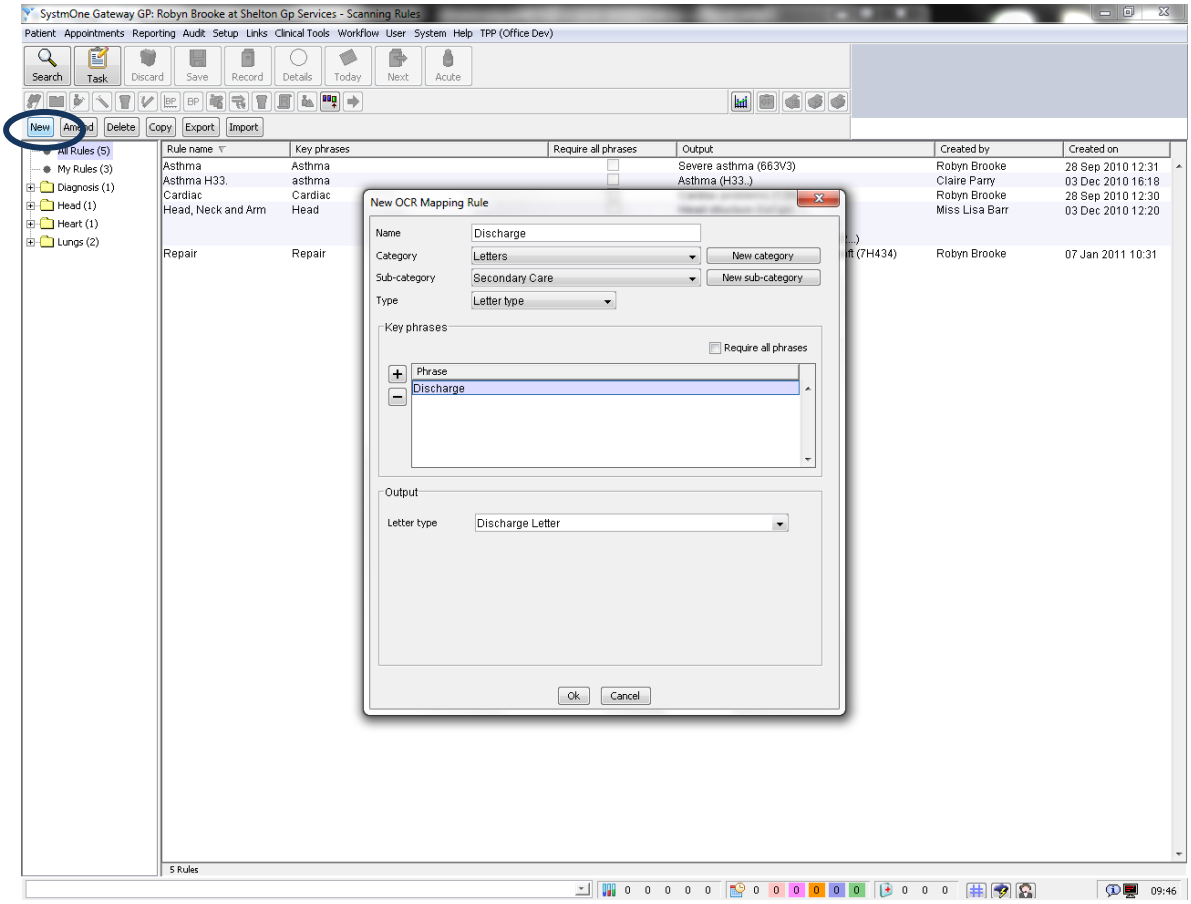
6. Under Output click on the Read code button, which will launch the Read code browser, then search for a Read code that you want OCR to match to the phrase above (e.g. 8HE.. Discharged from hospital).
7. You can enter up to 4 phrases in the Phrase field and up to 50 Read codes on the Output field.
8. If you tick the box that says Requires all phrases, the phrases that you have entered must *all* be present in the scanned letter in order for the Read code to be suggested.

To setup a rule to suggest letter type:

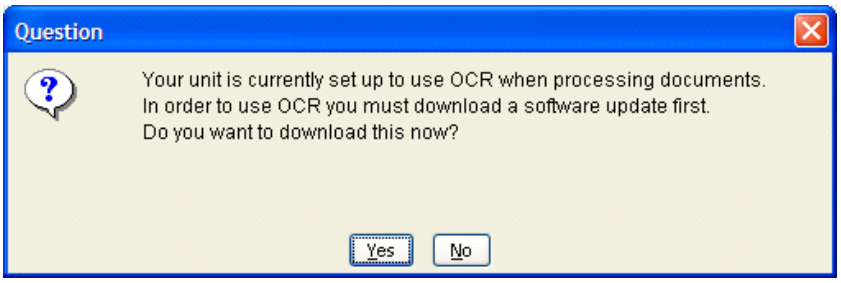
1. Enter a name, category and sub category for your rule.
2. Click the Type drop down bar and select 'Letter type'.
3. Then in the same way as for Read codes, enter a phrase (e.g. discharge) and the letter type from the drop down bar. This list is configurable by your Organisation Group Owner, you can see who this is by going to Setup > Users & Policy > Organisation Groups.



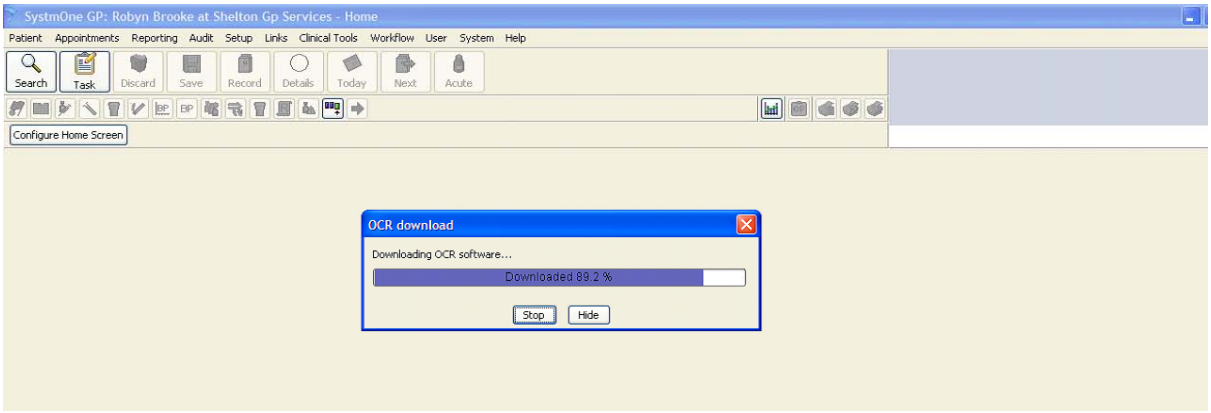
OCR Downloading

If this is the first time you have used Document Management, the OCR software will need to download to your computer. This will take a few minutes but you only need to do it once.

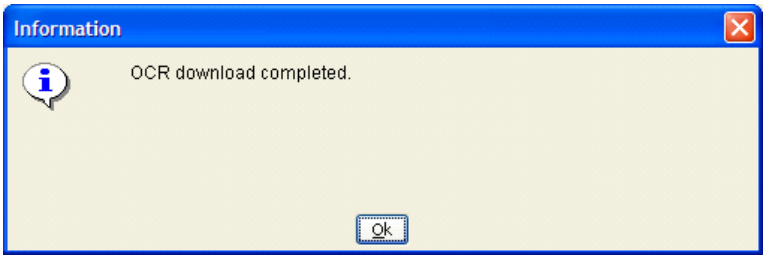
To begin to scan go to Workflow > Document Management > Acquired Documents.



The 'loading' bar will display clearly on the Acquired Document 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.



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