

# Document Management User Guide

## *For the attention of SystemOne users:*

This document explains how to use the Document Management functionality once the setup has been completed.

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## Beginning to Scan

It is very important that you only use ONE PC as a Gateway, if you change the Gateway PC it will result in images being unavailable and you will be unable to process them.

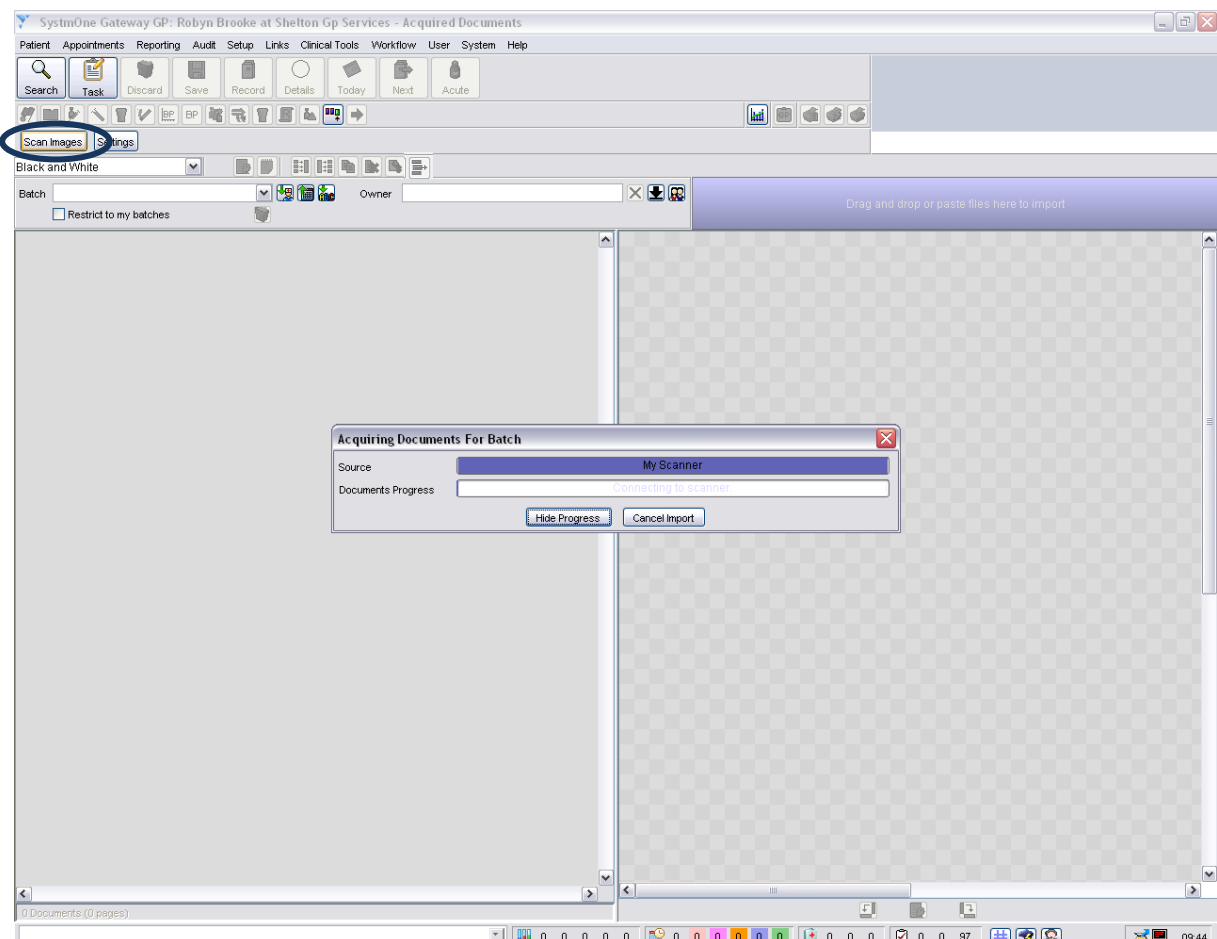
The following file types are supported by SystemOne:

TIFF/TIF, JPEG/JPG, GIF, BMP, PNG, PDF

There are different ways of getting scans onto SystemOne:

1. Directly from a scanner

To scan directly from your computer go to Workflow > Document Management > Acquired Documents. Select your Predefined Scanner Setting that is appropriate for the document and click Scan Images, the document will be scanned in using the setting you have chosen.



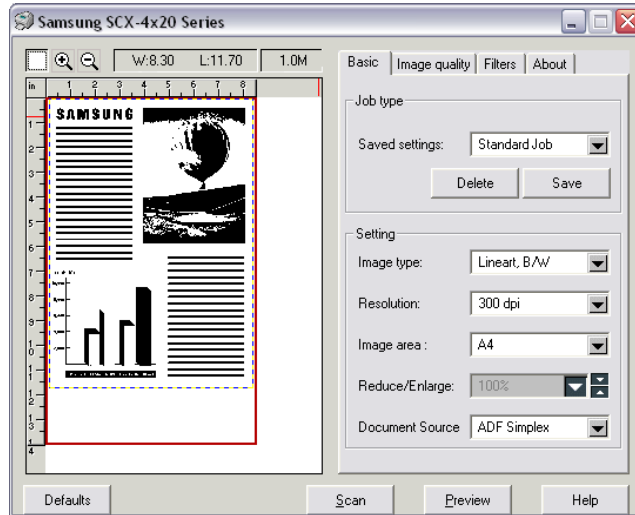
Alternatively, you can select Custom > Scan Images if none of your predefined setting are appropriate.



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Enter a Batch name and select Use this Device, you will then be able to choose the scan settings for your document. Note how the scanner has your chosen name and is called a 'Device' on this dialog, this indicates that you are scanning from your scanner.

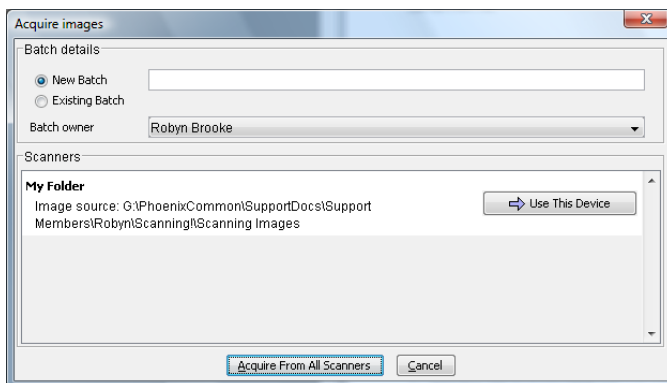
Click Scan and your document will appear on the Acquired Document screen.



## 2. Directly from a folder

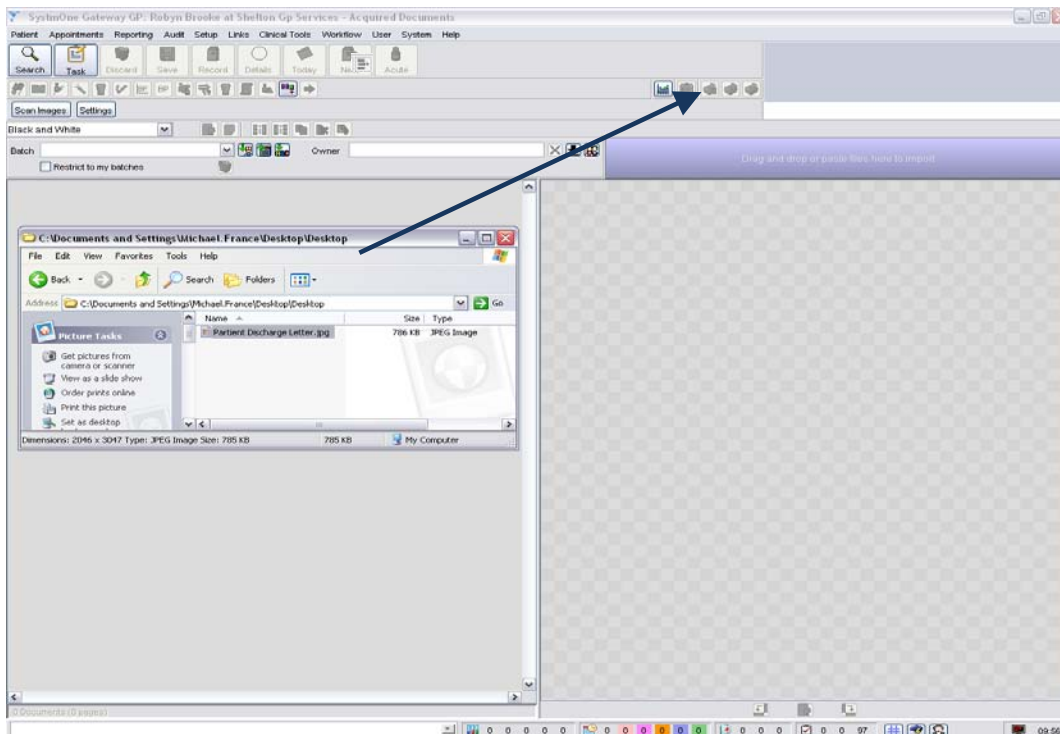
To scan directly from a folder on your computer go to Workflow > Document Management > Acquired Documents. Make sure that you have set up a source folder in your Settings and then click Scan Images.

Enter a Batch name and select Use this Device. Note how the scanner has your chosen name and is now called an 'Image source' on this dialog, this indicates that you are scanning from a folder on the computer.



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### 3. Drag and Drop



Drag and

Drop is new functionality which will enable you to drag an image from a folder on your PC into the Acquired Documents screen and begin processing it. Simply select the document and drag it onto the lilac bar on the top right hand side of the Acquired Documents screen. You can also use the keyboard shortcuts for copy (Ctrl+C) and paste (Ctrl+V) which will copy and paste your images on to the Acquired Documents screen, make sure you paste/drop the document onto the lilac bar or it won't work.

If you have multiple documents you can drag and drop these in one go or even drag and drop the entire folder.

In all of these ways you are able to set the owner of the scan, assign that scan to an existing batch or give that new batch a name. Once you have assigned a batch to an owner, only that person will be able to work on that batch unless you choose to assign a new owner.

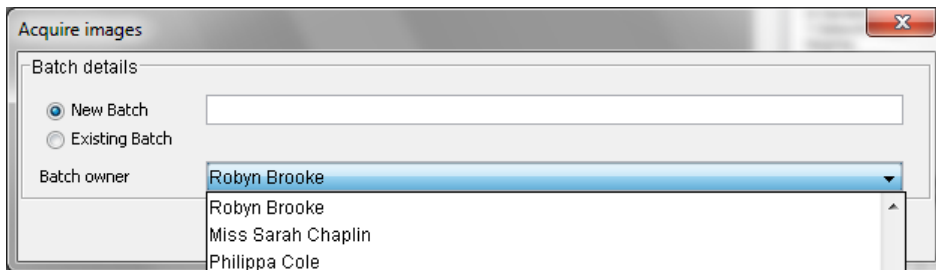


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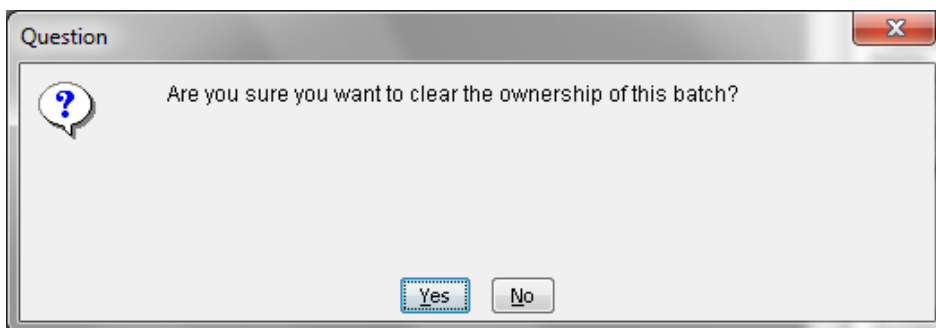
## Assigning the scan

The concept of assigning a scan is important in Document Management as only the staff member that the scan or batch is assigned to will be able to work on it. When initially scanning a document into Document Management you can set the Batch owner on the Acquired images dialog, the user that is logged in will default to being the Batch owner.

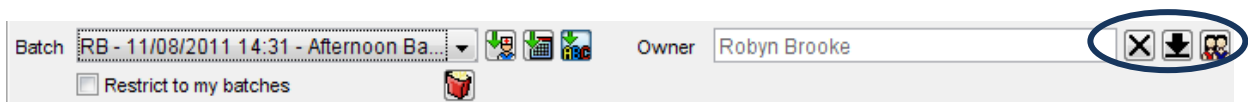
The owner of a scan can be reassigned by selecting a different staff member or left blank to be reassigned later from the batch owner drop down menu.



Once the document has been scanned, you can clear the Batch owner from the Acquired Documents screen by clicking on the cross . You will be asked 'Are you sure you want to clear ownership of the batch?' and will have to confirm before the Batch owner is cleared.



You can then allocate yourself as the owner of the batch by clicking on the down arrow or alternatively select the icon for 'Select a member of staff to take ownership' this will allow you to assign this batch to another member of staff at the unit.

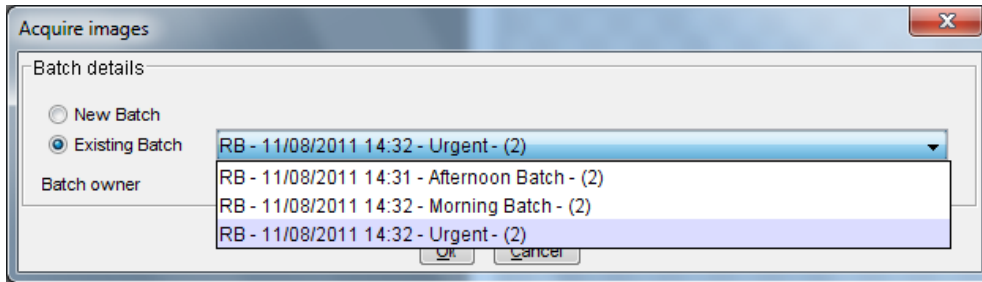


You can also add to an existing batch, this can be done at the point of scanning the document, where instead of choosing a name for your batch and an owner you simply select the radio button

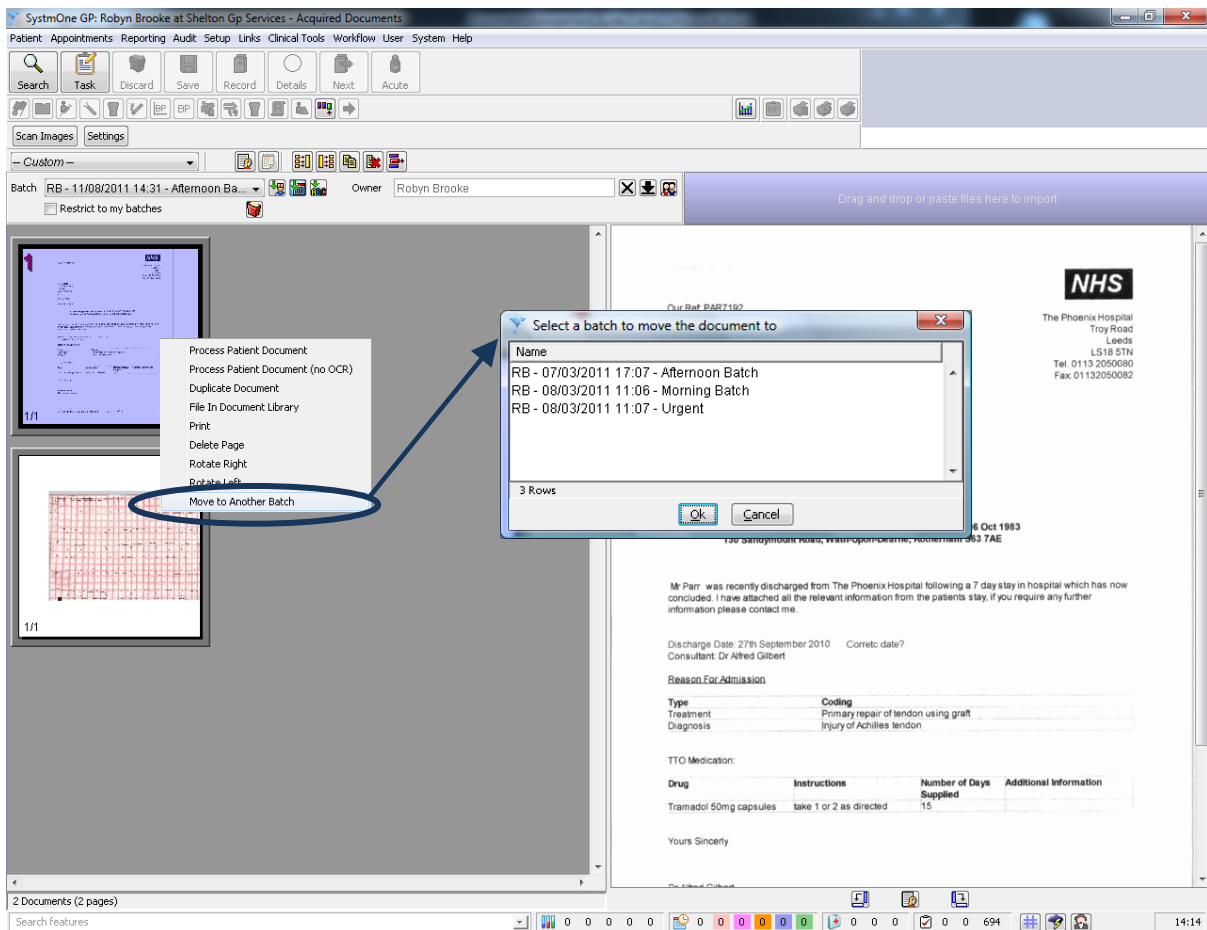


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for Existing Batch and choose from the drop down list of available batches and how many documents there are in them.



A document can also be added to an existing batch when it has already been scanned in. To do this you can right click on a scan on the Acquired Documents screen and select Move to Another Batch, you can then choose which batch you like to move the document to. The document will then move to the chosen batch and will display at the bottom of that batch.

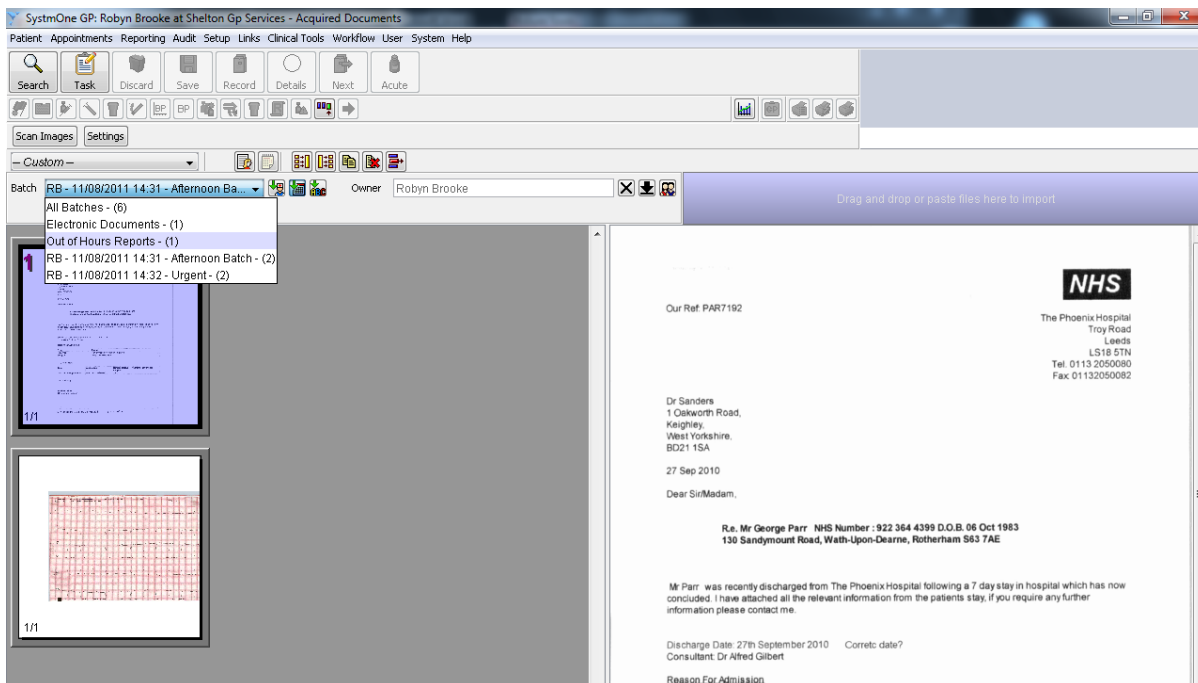
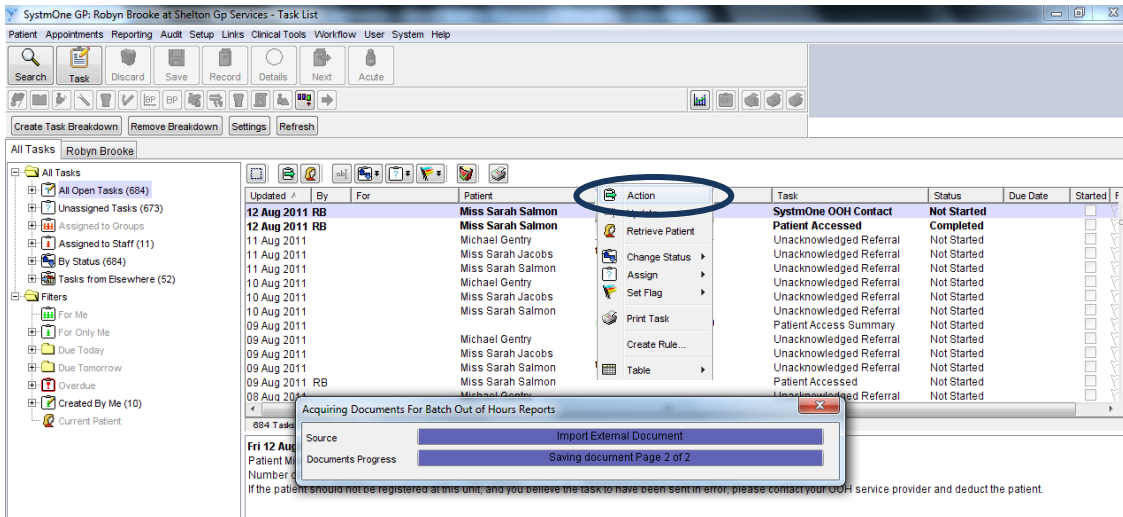




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## OOH and Discharge Letters

If you have the Organisation Preference enabled to 'use the Document Management module for received out of hours report and hospital letter tasks' then once you action the task you will see the Document Management progress bar. Once this has completed your task, it will move the document to either the Out of Hours or the Electronic Documents batch in the Acquired Documents screen for you to process.



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## Organising your batches

Next to the Batch drop down bar you will see the following icons. These icons perform different actions and will help to organise your batches.



Sort batches by staff. This will order the list of batches alphabetically by the staff initials. With the arrow facing down, the list will be ordered by the staff member's last initial A-Z, and with the arrow facing up, the list will be ordered by the staff member's last initial Z-A.



Sort batches by date. This will order the list of batches by the creation date. With the arrow facing down the list will be ordered by oldest - newest and with the arrow facing up the list will be sorted newest - oldest.



Sort batches by name. This will order the list of batches alphabetically by the name given to the batch. With the arrow facing down the list will be ordered A-Z and with the arrow facing up the list will be ordered Z-A.



Delete all documents in the current batch. This will delete the batch and all of its contents.

You can have lots of different scanned letters in one batch and they do not necessarily have to be for the same patient, which means that you can go back to your batch once you have finished with one scan and begin to process the next. However, as batches cannot be worked on by more than one member of staff it is advisable that you only put a sensible amount of scans in one batch as it is designed to reflect one person's workload.

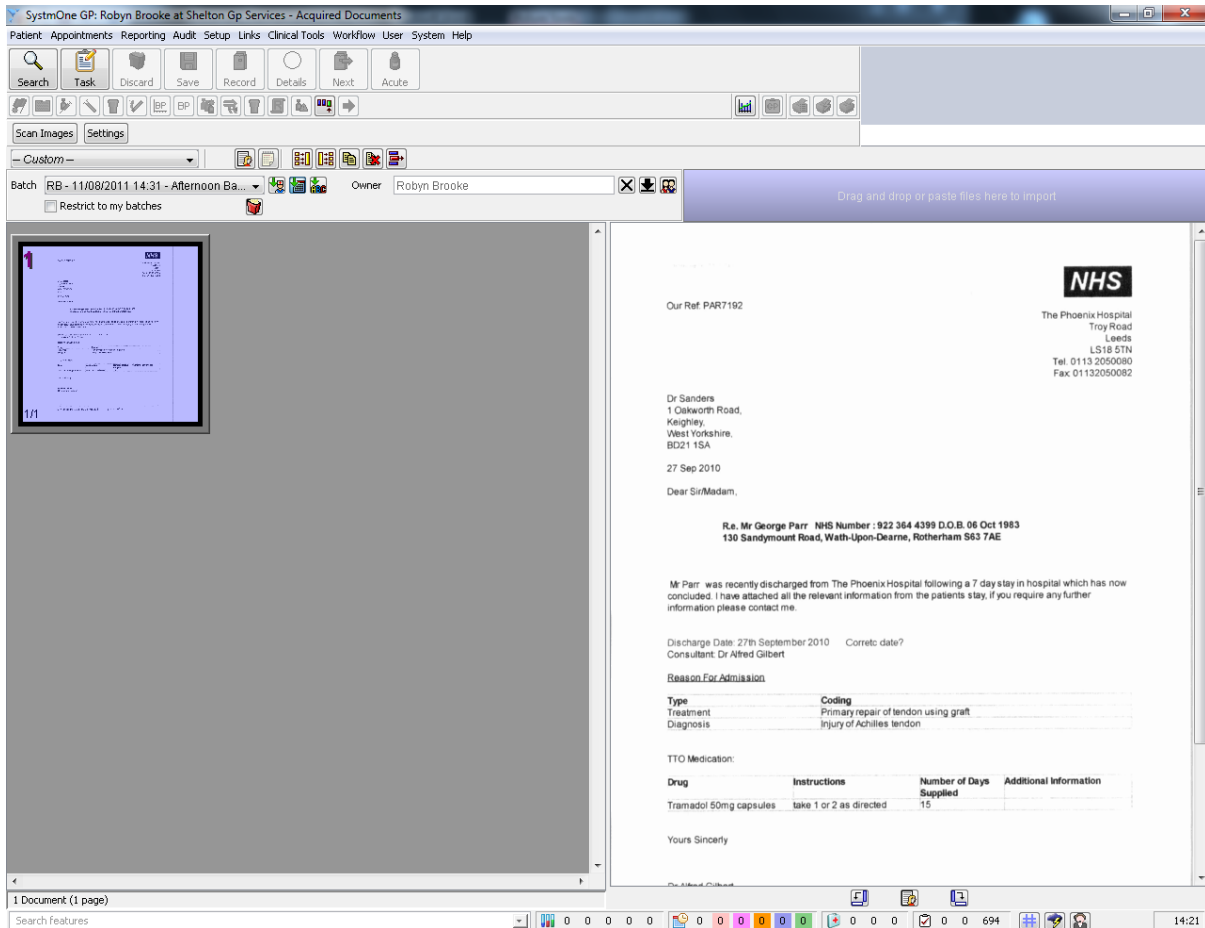




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## Processing a Scan

The Acquired Documents screen, shown below, is where your scan will sit.



From this screen you have the following options in the form of an icon or a right click option:

1. To rotate your scans left and right



Rotate to the left



Rotate to the right

2. To merge and separate pages



Merge the selected pages (once a document is merged you can rearrange the order by simply highlighting the page you want to move and dragging it to its correct position).



Unmerge the selected pages.



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3. To duplicate the selected document



Duplicate the selected document (you must either be the Gateway PC or be attached to the Gateway PC to duplicate documents).

4. To delete the selected pages



Delete the selected pages.

5. To add the document you have selected to an existing batch

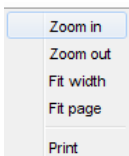


Add the selected documents to an existing batch.

6. To add the document to the Document Library



File the selected document in the organisation Document Library. The Document Library can be used to store any documents that do not need to be filed to a patient. The Document Library is located in Workflow > Document Management > Document Library.



7. When you right click on the letter you have different options on how you would like to view the letter; zoom in, zoom out, fit to width or fit to page. This can be done from any screen which has a scanned document from Document Management.

8. If you have multiple documents in your batch and you would like to merge them together you can use the shortcut 'Ctrl+A' (which will highlight all the documents), select the icon for merge together and then select 'Ctrl+Enter' (which will process the document). Make sure that the documents are already in the correct order before doing this as you will not be able to rearrange them during the next stage.



9. To move an image to another batch

Move the image to another batch which you can choose from a list.

8. To process the selected document as a patient document

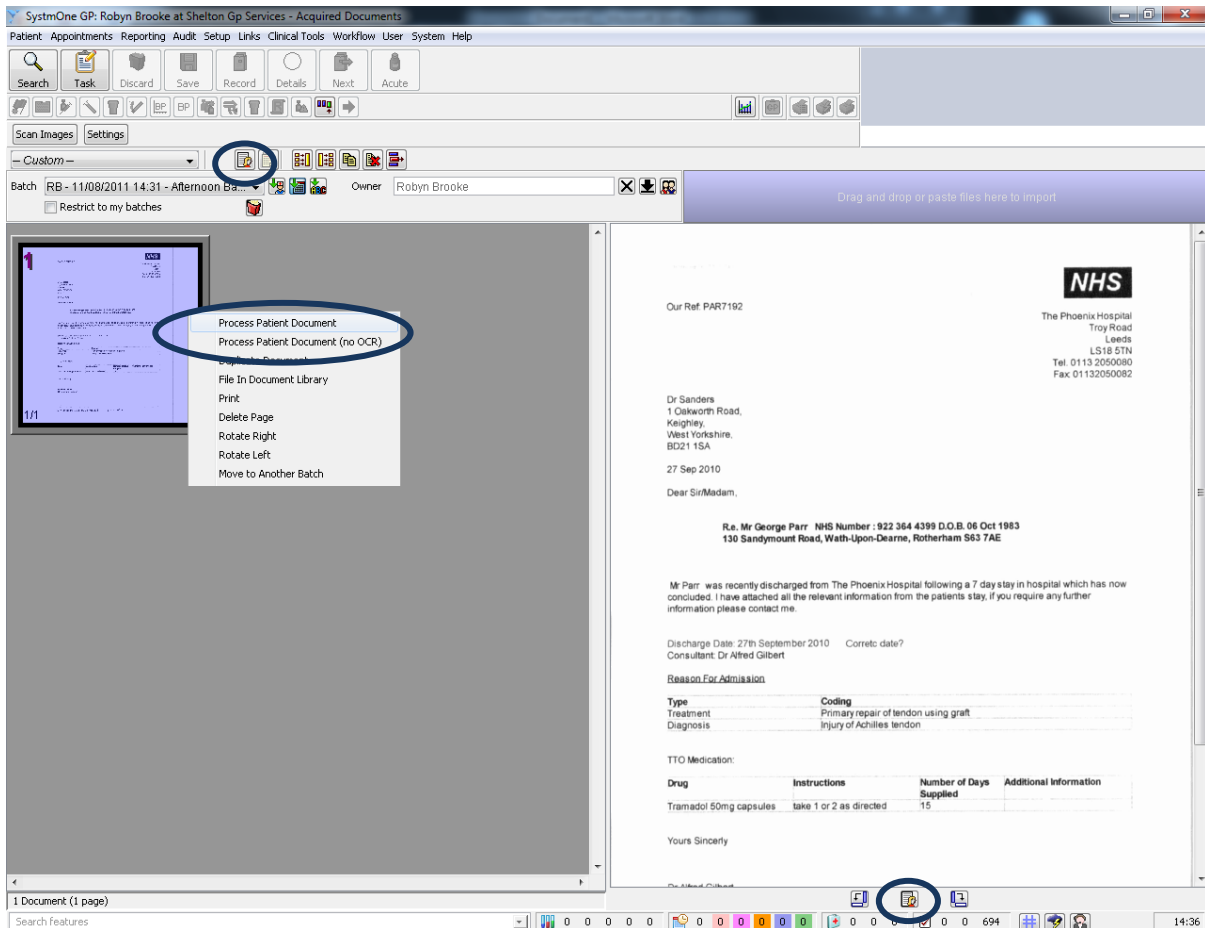


Process the selected document as a patient document. If you want to process a document to file to a patient record then you can either click the 'Process the selected document

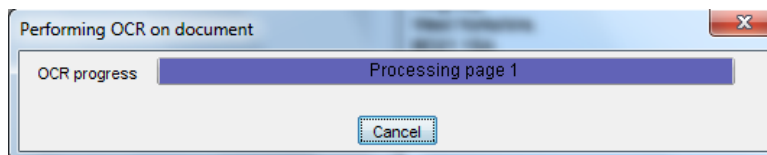


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as a patient document' icon or use the right click option 'Process Patient Document'.  
Alternatively, if the document does not require OCR then you can use the 'Process Patient Document (no OCR)'



Once you have selected Process Patient Document you will see a loading bar which is OCR 'reading' the document.




You will automatically be taken to the Scanned Document Update screen to continue processing the scan once OCR is completed.



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## Scanned Document Update (OCR Results)

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 patient in the letter to a record on SystemOne using their NHS number, date of birth and surname. Any other possible patients will be listed in the Suggestions section at the bottom details panel for you to choose from. If none of the suggestions are correct then you can search manually for the patient using the  button within this panel.

**Scanned Document Update**

Confirm Cancel Print

**Patient**  
Mr George Parr  
NHS Number: 9223644399  
Born: 06 Oct 1983  
57 Queens Crescent, Lincoln, LN1 1LR

**Letter Details**  
Clinic Letter  
Incoming - 04 Mar 2011

**Sender Address**  
Dr Alfred Gilbert  
Troy Road, Horsforth, Leeds LS18 5TN

**Recipient Address**  
Dr Lucy Sanders  
Shelton Gp Services  
Shelton Primary Care Ctr, 1 Oakworth Road, Keighley BD21 1SA

**Read Codes**  
2 Read codes selected

← Previous Next →

Selected: Mr George Parr

Patient	Nhs Number	Address
Mr George Parr	9223644399	57 Queens Crescent, Lincoln, LN1 1LR

1 Patient

Our Ref: PAR7192

**NHS**  
The Phoenix Hospital  
Troy Road  
Leeds  
LS18 5TN  
Tel: 0113 2050090  
Fax: 01132050082

**Dr Sanders**  
1 Oakworth Road  
Keighley,  
West Yorkshire,  
BD21 1SA

**27 Sep 2010**

Dear Sir/Madam,

**R.e. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Upon-Dearne, Rotherham S63 7AE**

Mr Parr was recently discharged from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010  
Consultant: Dr Alfred Gilbert

**Reason For Admission**

Type	Coding
Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon

1

Show annotations

OCR will attempt to match the letter details to any Letter Rules that have been previously set up in Scanning Rules. It will also look for any dates in the letter and offer them as a suggestion for you to use. If OCR cannot find any dates then it will automatically choose today's date as the date for the letter (as long as you have the User Preference enabled).

You have the option in the panel below to mark the letter as either Clinically Relevant, Admin Event, Important or Normal. This will then display in the Communications and Letters node and the New Journal.



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OCR will attempt to 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.

In the event of multiple addresses found using OCR for both sender and recipient address, you will be given a list at the bottom of the screen to choose from, click on the correct address (this will be highlighted in lilac on the letter so you know where OCR got it from). You will then need to click on the purple arrow or double click the address to insert it into the correct field.





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**Scanned Document Update**

Confirm Cancel Print

**Patient**  
Mr George Parr  
NHS Number: 9223644399  
Born: 06 Oct 1983  
57 Queens Crescent, Lincoln, LN1 1LR

**Letter Details**  
Clinic Letter  
Incoming - 04 Mar 2011

**Sender Address**  
Dr Alfred Gilbert  
The Phoenix Hospital  
Troy Road, Horsforth, Leeds LS18 5TN

**Recipient Address**  
Dr Lucy Sanders  
Shelton Gp Services  
Shelton Primary Care Ctr, 1 Oakworth Road, Keighley BD21 1SA

**Read Codes**  
2 Read codes selected

← Previous Next →

**Sender Address**

Person name: Dr Alfred Gilbert  
Organisation: The Phoenix Hospital  
House name:   
Road: Troy Road  
Locality: Horsforth  
Town: Leeds  
County: West Yorkshire  
Post code: LS18 5TN

Suggestions:  
Address:  
Dr Alfred Gilbert  
The Phoenix Hospital  
The Phoenix Hospital  
Troy Road, Horsforth, Leeds LS18 5TN  
Troy Road, Horsforth, Leeds LS18 5TN

2 Addresses

27 Sep 2010

Dear Sir/Madam,

**R.e. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Upon-Dearne, Rotherham S63 7AE**

Mr Parr was recently discharged from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010  
Consultant: Dr Alfred Gilbert

**Reason For Admission**

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Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon






TTO Medication:

Drug	Instructions	Number of Days Supplied	Additional Information
Tramadol 50mg capsules	take 1 or 2 as directed	15	

Yours Sincerely

Dr Alfred Gilbert  
Orthopaedic Surgeon

You have several buttons which allow you to enter addresses quickly if they have not been picked up by OCR:

-  Use someone in your address book
-  Use someone from the organisation directory
-  Use patient details
-  Use organisation details
-  Use your organisation default

OCR will attempt to 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. Do not worry if nothing is picked up, it may be because your access rights have you restricted to





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Read Code Formularies. This can be corrected during the next stage by someone who isn't restricted.

**Scanned Document Update**

Confirm Cancel Print

**Patient**  
Mr George Parr  
NHS Number: 9223644399  
Born: 06 Oct 1983  
57 Queens Crescent, Lincoln, LN1 1LR

**Letter Details**  
Clinic Letter  
Incoming - 27 Sep 2010

**Sender Address**  
Dr Alfred Gilbert  
Troy Road, Horsforth, Leeds LS18 5TN

**Recipient Address**  
Dr Lucy Sanders  
Shelton Gp Services  
Shelton Primary Care Ctr, 1 Oakworth Road, Keighley BD21 1SA

**Read Codes**  
2 Read codes selected

← Previous Next →

Select	Code	Description
<input checked="" type="checkbox"/>	8HE	Discharged from hospital
<input checked="" type="checkbox"/>	7H420	Repair of tendo achilles

2 Read codes

Keighley,  
West Yorkshire,  
BD21 1SA

**27 Sep 2010**

Dear Sir/Madam,

**R.e. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Upon-Dearne, Rotherham S63 7AE**

Mr Parr was recently **discharged** from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010  
Consultant: Dr Alfred Gilbert

**Reason For Admission**

Type	Coding
Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon

TTO Medication:

Drug	Instructions	Number of Days Supplied	Additional Information
Tramadol 50mg capsules	take 1 or 2 as directed	15	

Yours Sincerely


**Dr Alfred Gilbert**  
Orthopaedic Surgeon

1

Show info Show annotations

To access any of the sections on the details pane you can use the 'Previous' and 'Next' buttons or the keyboard shortcut of shift and use the arrow keys up or down to move around the details pane.

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.

To add your predefined stamps to the scan click on the  icon and select the stamp you want to use, then click anywhere on the page. If you are not happy with the position of your stamp select the arrow icon on the bottom toolbar and then move your stamp.





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## Scanned Document Update 2

After pressing Confirm, you will be automatically taken to the second Scanned Document Update screen. This screen gives you the option to add more Read codes, problems, link to referrals and problem headers, notes and record the activity, set flags and send a task.

**PARR, George (Mr)** Born: 06-Oct-1983 (27y) Gender: Male NHS No. 922 364 4399

Address: 57 Queens Crescent, Dinnington LN1 1...Phone and email: Unknown

1 Oakworth Road, Keighley, West Yorkshire, BD21 1SA

27 Sep 2010

Dear Sir/Madam,

R.e. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Upon-Dearne, Rotherham S63 7AE

Mr Parr was recently discharged from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010  
Consultant: Dr Alfred Gilbert

**Reason For Admission**

Type	Coding
Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon

TTO Medication:

Drug	Instructions	Number of Days Supplied	Additional Information
Tramadol 50mg capsules	take 1 or 2 as directed	15	

Yours Sincerely  
Dr Alfred Gilbert

RB 27 Jul 2011 10:57

To enter a new Read code and/or update an existing Read code found with your rules:



1. Click on the Read code icon at the top of the screen which will launch the Read code browser, search for the Read code and click Ok.
2. This will then enter the new Read code in the top panel
3. If a Read Code is already present in the patient's record, the episodicity will default to 'Ongoing episode'. If the Read Code is not present in the patient's record then the episodicity will default to 'New episode'.
4. If you want to promote the Read code to a problem, tick the box and it will become a problem.



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5. If you want to make this Read Code a permanent scanning rule you can right click on it and choose to Add Read Code Scanning Rule. This will then bring up the OCR Mapping Rule screen where you will need to enter a name and a phrase for your new rule.

6. The bottom panel will change so you can specify the exact details about the Read code such as the episodicity, date and time and notes.



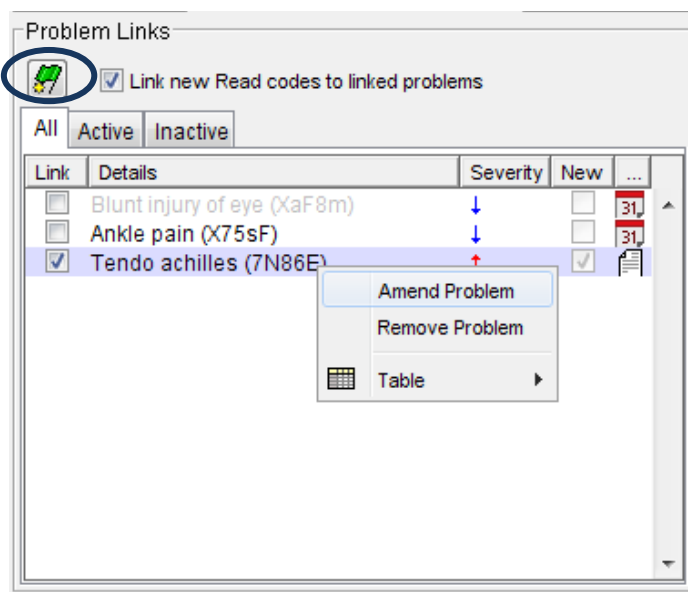
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- To remove a Read code from this screen, right click and choose to remove or click the button.

To create or link to an existing problem:



- Click on the problem flag icon at the top of the screen.
- The bottom panel will change to show all the patient's Active and Inactive problems in separate tabs. To select a problem to add to the scanned document, ensure the 'Link' tick box is selected.
- You can also choose to create a new problem by clicking on the 'new problem icon'. Using the right click option you can remove or amend any new problem you have created.



- There is a tick box for 'Link new Read codes to linked problems', this will automatically link all new Read codes which have been added to the letter to all the problems that you choose to tick. If you do not want all the new Read codes to be linked to the selected problems, then simply untick the box.
- There is a section for Notes and Duration, which displays any notes made against the problem and the start and finish date of the problem. You can see any details entered by hovering over the icons in the section.

To link to an existing or ended referral:

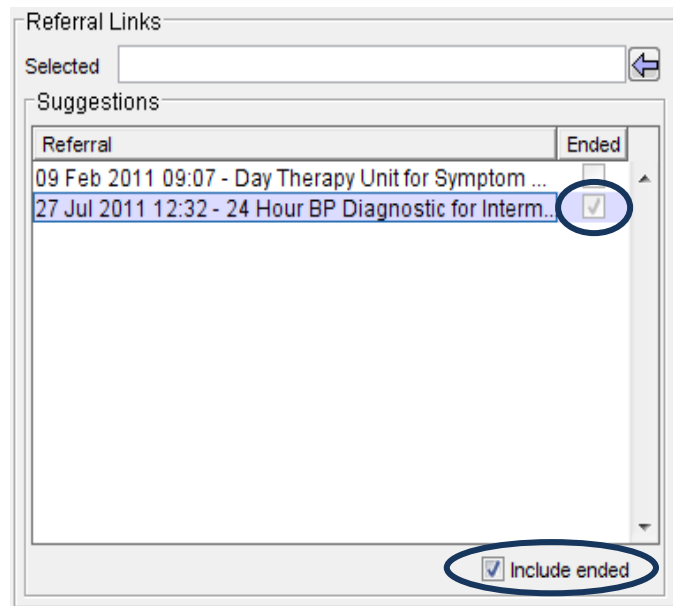


- Click on the referral icon at the top of the screen.



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2. The bottom panel will change to show any existing referrals you can link the document to, please note that you can only link to referrals in to the organisation, select the referral you want to link the letter to and click the arrow to add it to the scanned document.
3. You can link the scan to an ended referral by ticking the 'Include ended' box at the bottom of the panel. Any ended referrals will then appear in the suggestions box with a tick next to them to highlight that they are ended.



To add a new note:



1. Click on the note icon at the top of the screen.
2. The bottom panel will change to become a notes field where you can enter any notes about the letter that you want to appear in the New Journal.

To record a new activity:



1. Click on the activity icon at the top of the screen.
2. The bottom panel will change to become the activity details box





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3. Fill in the appropriate details, or if you have set your User Preference to default to a particular contact then all you need to do is click on one of the clock icons which each denote a time, either 5, 10 or 15 minutes.

To perform OCR to look for Read Codes:



If the person who initially processed the scan did not have the correct access rights in order to enter Read Codes then you can perform OCR at this stage to look for Read Codes.

1. Click on the 'Find Read Codes in the document via OCR' button.
2. OCR will then look for any Read Code Scanning Rules and enter them against the scan.

To assign a flag:



You can assign a flag and it will display next to the scan in the Documents Inbox.

1. Click on the 'No Flag Selected' section,
2. The bottom panel will change to display the flags and their descriptions.
3. Double click on a flag and it will move to the top section.

To send a Task:

If you want to send a task to another member of staff from within Document Management then click on the **Send Task** button. This will open up a normal task and works in the same way as tasks in the rest of SystemOne.

What to do next:

Click on Scan Action at the top of the screen.



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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:

Scan Action

Complete Later
  Forward
  Complete

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 gives you the ability to pass it to another member of staff to work on.
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.

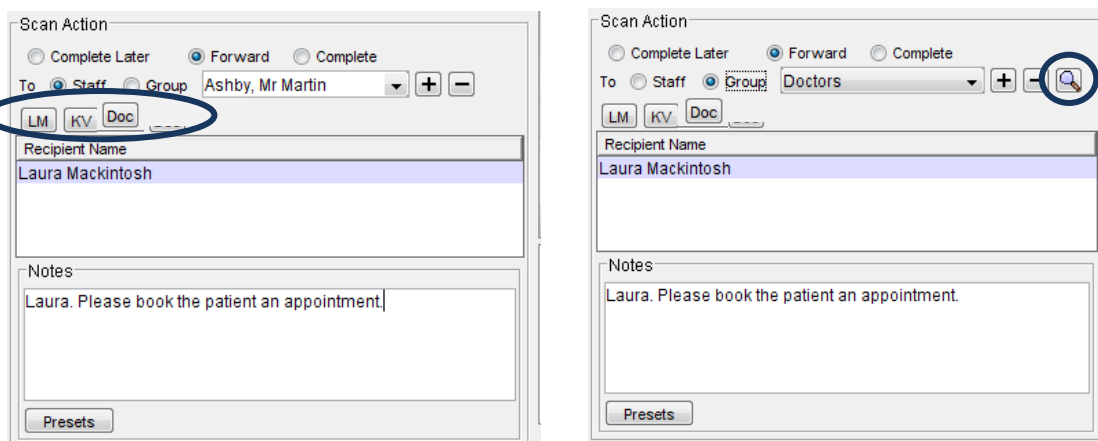



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## Forwarding

The concept of 'forwarding' in Document Management is similar to the workflow of tasks on the old scanning module. You can forward the scan onto other recipients allowing them to continue to process the scan.

1. Select Forward as your Scan Action.
2. If you have set up your Favourite Forwarding List then the staff members or groups you have chosen will be bookmarked with their initials. You can then select the bookmark which will then add them to your forwarding list. You will be able to see which staff members are in your favourite forwarding group by clicking on the magnifying glass icon when you have the 'Group' radio button selected.



3. If you need to select a different member of staff then select the drop down bar, select the staff members name and click the  button to add them to your forwarding list. You can forward the scan to as many relevant people as you want, and attach a note as well.

If you have sent the document to more than one person then these people will be able to view and add items to the scan, but they will not be able to see each other's additions (if any have been made) until they have filed in to the patient record. The document can then be viewed in the Communications and Letters node as one scanned image.





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You are able to assign a scan a coloured flag which can be used at your discretion for any reason and the names can be configured via Organisation Preferences > Scanning > Flags. To assign a flag select the flag icon and choose the colour/description you want, this will then display in the Flag column which is orderable.

There is also an option to Bulk Forward scans from the Document Inbox. Highlight the scans you want to bulk forward, right click and choose to Bulk Forward. You will then be asked to choose a staff member or group to bulk forward to.

You can view all updates for the scan using a right click option and selecting View All Updates for Document, this shows an audit trail for who has been sent the scan and any notes that were entered when the document was forwarded.

The screenshot shows the 'SystemOne GP: Laura Mackintosh at Shelton Gp Services - Documents Inbox' window. A document update is selected, and a context menu is open with 'View All Updates For Document' highlighted. A separate window titled 'Updates For Document' displays the following data:

Created	Created By	Recipient	Completed	Notes
27 Jul 2011 10:55	Robyn Brooke	Robyn Brooke	27 Jul 2011 13:00	Laura, please can you book the patient an appointment.
27 Jul 2011 13:00	Robyn Brooke	Laura Mackintosh		



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## Completing a scan

Once you have processed your update and finished working on the scan, you need to set the Scan Action to Complete. This will file all the details entered to the patient record.

**Scanned Document Update**

Ok Ok and Another Cancel Send Task Print

**PARR, George (Mr)** Born 06-Oct-1983 (27y) Gender Male NHS No. 922 364 4399

Address 57 Queens Crescent, Lincoln LN1 1...Phone and email Unknown Allergies not recorded

1 Oakworth Road,  
Keighley,  
West Yorkshire,  
BD21 1SA

27 Sep 2010

Dear Sir/Madam,

**Re. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Upon-Dearne, Rotherham S63 7AE**

Mr Parr was recently discharged from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010  
Consultant: Dr Alfred Gilbert

**Reason For Admission**

Type	Coding
Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon

TTO Medication:

Drug	Instructions	Number of Days Supplied	Additional Information
Tramadol 50mg capsules	take 1 or 2 as directed	15	

Yours Sincerely

Dr Alfred Gilbert

Scan Action: Complete Later Forwar **Complete**

RB 27 Jul 2011 10:57

The scanned document can now 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. You can see what information was entered against the letter at a glance by looking at the Information heading.





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The screenshot displays the SystemOne Gateway interface for a patient record. The main window shows the 'Communications & Letters' section with a table of letters. A context menu is open over a letter dated 04 Mar 2011, with options like 'View Letter', 'Save File(s)', 'Letter Sent', 'Amend Content', and 'Show Journal Entry...'. A second window shows the 'Scanned Document Viewer' for a letter from Dr Alfred Gilbert to Mr Parry, dated 07 Mar 2011. The letter text includes patient details, a discharge summary, and medication instructions for Tramadol.

You are also able to mark a letter as important from the patient record if the scan was not marked as important during the Document Management workflow. To do this simply right click on the letter and select 'Amend Details' and then 'Priority Important'. Also on this menu you can amend the letter type and the direction of the letter (incoming, outgoing or other).



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You can navigate through a patient's scanned documents using the Previous Document and Next Document buttons. This will cycle through the documents in chronological order and let you look back at previously received documents.

**Scanned Document Update**

Previous Document Next Document Close Print

PARR, George (Mr) Born 06-Oct-1983 (27y) Gender Male NHS No. 922 364 4399

Address 57 Queens Crescent, Lincoln LN1 1... Phone and email Unknown Allergies not recorded

**Letter Details**

**Sender Address**

**Recipient Address**

**Problem Links**

**R Read Code**  
Repair of tendo achilles (7H420)

**R Read Code**  
Discharged from hospital (8HE.)

**R Read Code**  
Repair of tendo achilles by tendon lengthening procedure (8S00T)

LS18 5TN  
Tel: 0113 2050080  
Fax: 01132050082

Dr Sanders  
1 Oakworth Road,  
Keighley,  
West Yorkshire,  
BD21 1SA

27 Sep 2010

Dear Sir/Madam,

**R.e. Mr George Parr NHS Number : 922 364 4399 D.O.B. 06 Oct 1983  
130 Sandymount Road, Wath-Up-on-Deerne, Rotherham S63 7AE**

Mr Parr was recently discharged from The Phoenix Hospital following a 7 day stay in hospital which has now concluded. I have attached all the relevant information from the patients stay, if you require any further information please contact me.

Discharge Date: 27th September 2010 Correct date?  
Consultant: Dr Alfred Gilbert RB 07 Mar 2011 16:48

**Reason For Admission**

Type	Coding
Treatment	Primary repair of tendon using graft
Diagnosis	Injury of Achilles tendon

**TTO Medication:**

Drug	Instructions	Number of Days Supplied	Additional Information
Tramadol 50mg capsules	take 1 or 2 as directed	15	

Previous Next

Letter Details

Direction  Incoming  Outgoing  Other

Date Exact date 04 Mar 2011

Suggestions

Date

0 dates

Contact

Clinically relevant  Admin event

Type Clinic Letter

Show annotations



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The scanned document can also be viewed by right clicking on the letter image in the New Journal.

The screenshot displays the SystemOne Gateway interface for a patient record. The top navigation bar includes options like Search, Task, Discard, Save, Record, Details, Today, Next, and Acute. The patient information at the top right identifies Mr. George Parry, born 06 Oct 1983, with NRS number 922 364 4399. The 'New Journal' section on the left lists various entries, including 'Surgery: Robyn Brooke (Consultant)', 'Low back strain (Xa7mA)', and 'Achilles degeneration (N22yN)'. A right-click context menu is visible over a letter icon, with an arrow pointing to the 'Letter Details' option. The main window shows a scanned document of a letter dated 27 Sep 2010, addressed to Mr. Parry, detailing his recent hospital discharge and the primary repair of his Achilles tendon.

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:



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**Entered By** This will always show who completed the finished 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 the user who initially confirmed the letter to the record.

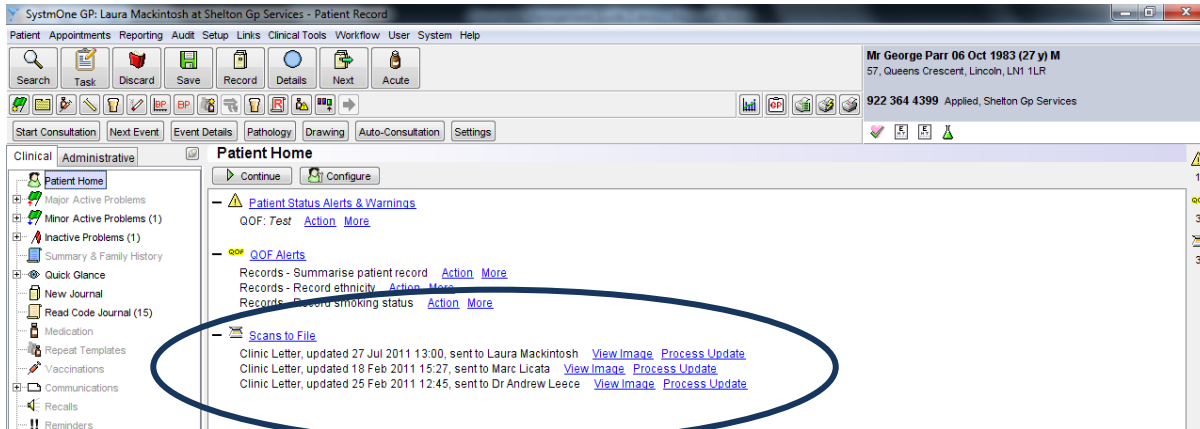
The screenshot shows the SystemOne interface for a patient record. The 'New Journal' section is highlighted, showing a list of events. Three specific entries are circled with blue ovals and arrows pointing to labels below:

- Initials:** Points to the initials 'RB' in the first column of the journal entry.
- Event done by:** Points to the name 'Robyn Brooke (Consultant)' in the second column of the journal entry.
- Entered By:** Points to the text 'Entered By: Laura Mackintosh' in the third column of the journal entry.



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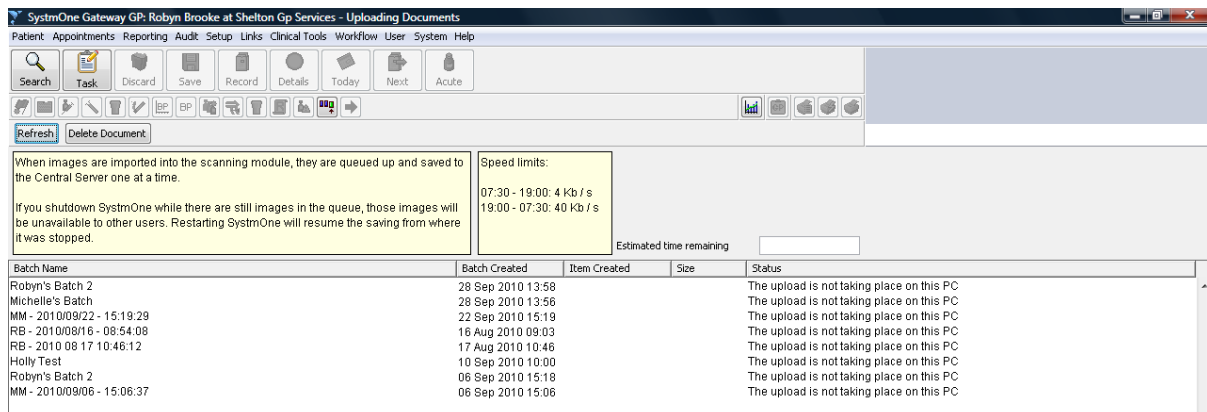
On the Patient Home you are able to see any scans relating to the patient which have not yet been completed. By clicking View Image you will be able to see the letter, by clicking Scans to File you will be taken to the Document Inbox or you can click Process Update to begin processing it.



## Uploading Documents Screen

The Uploading Documents Screen is located under Workflow > Document Management > Uploading Documents.

This screen shows all the documents that are currently uploading to the server. If you shut down the Gateway PC while there are still images in the queue, those images will be unavailable to other users. Restarting the SystemOne Gateway PC will resume the uploading from where it was stopped.





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## Document Search

The Document Search screen is located under Workflow > Document Management > Document Search.

On this screen you can search for any document using the following filters and options:

- Created
- Deleted
- Processed
- Staff member
- Sender name or organisation
- Recipient name or organisation
- Patient

By highlighting a scan and clicking on the Delete Document Updates button you will delete all the forwards that were created and you will receive a message telling you to check the patient record to ensure it is correct. The scan will then return to the Acquired Documents screen.

Batch	Created /	Created By	Patient	Sender	Recipient
RB - 27/07/2011 10:19 - Morning Batch	27 Jul 2011 10:19	Robyn Brooke	Mr George Parr	Dr Alfred Gilbert The Phoenix Hospital	Dr Lucy Sanders Shelton Gp Services



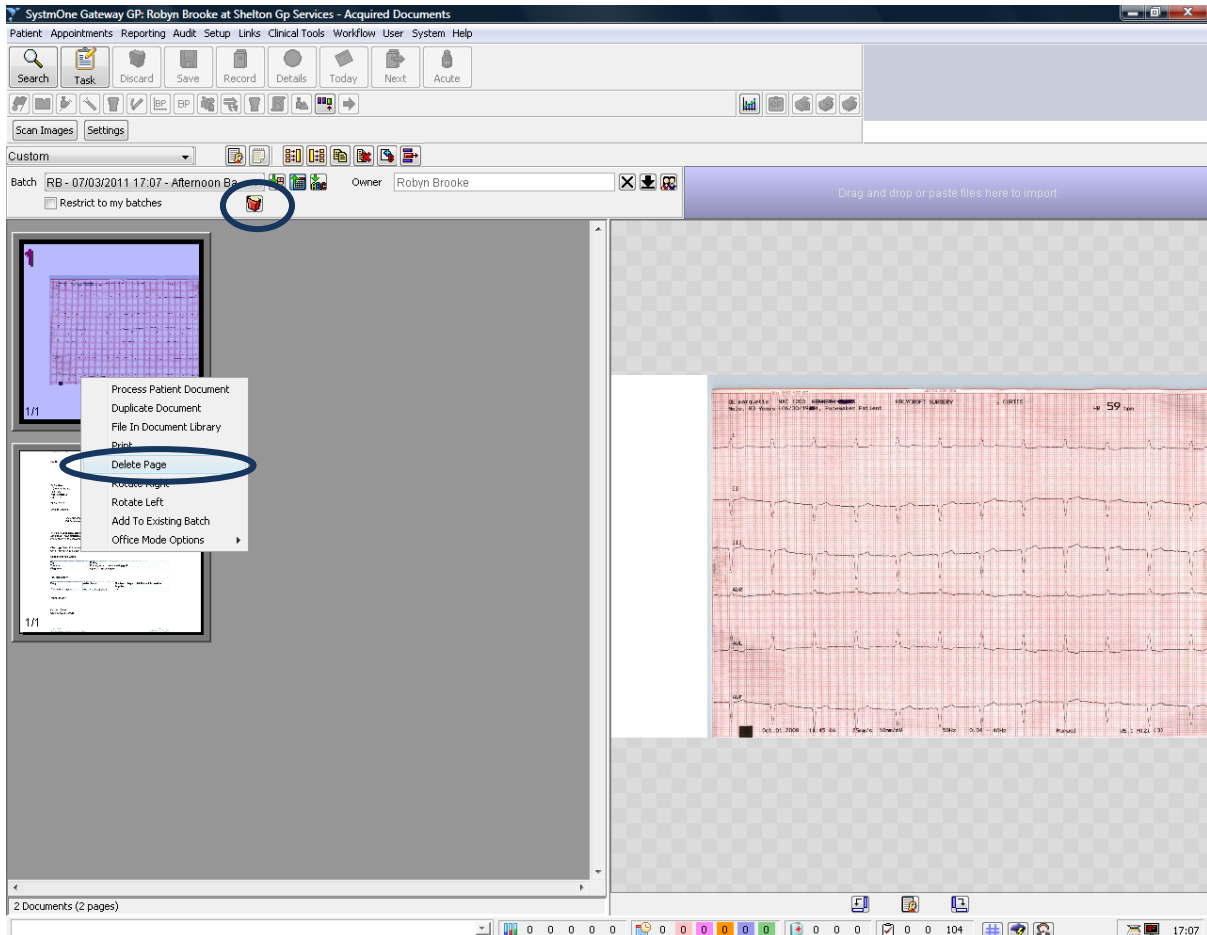


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## To Delete a Scanned Document

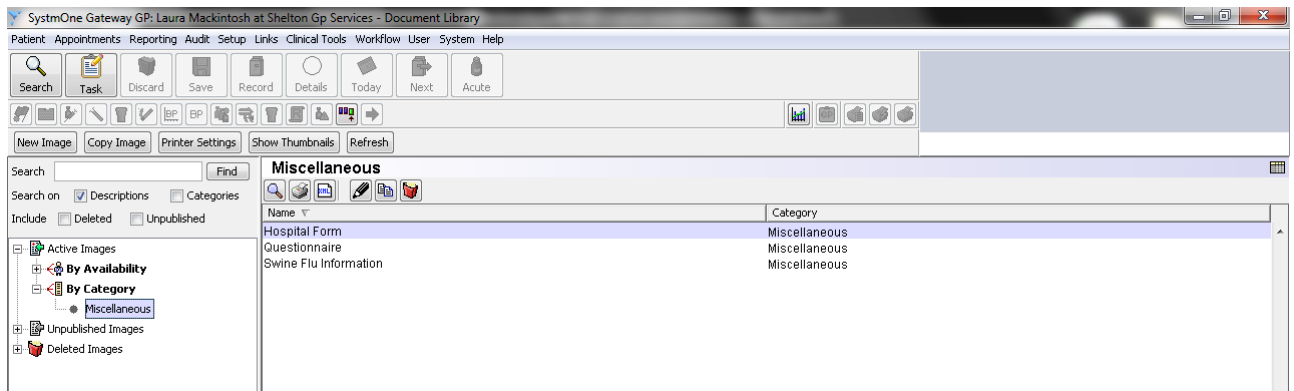
Scanned documents can be deleted from the following screens as described below:

1. From the Workflow > Document Management > Acquired Documents screen, right click on the image and select Delete page or use the icon next to the Batch drop down menu.

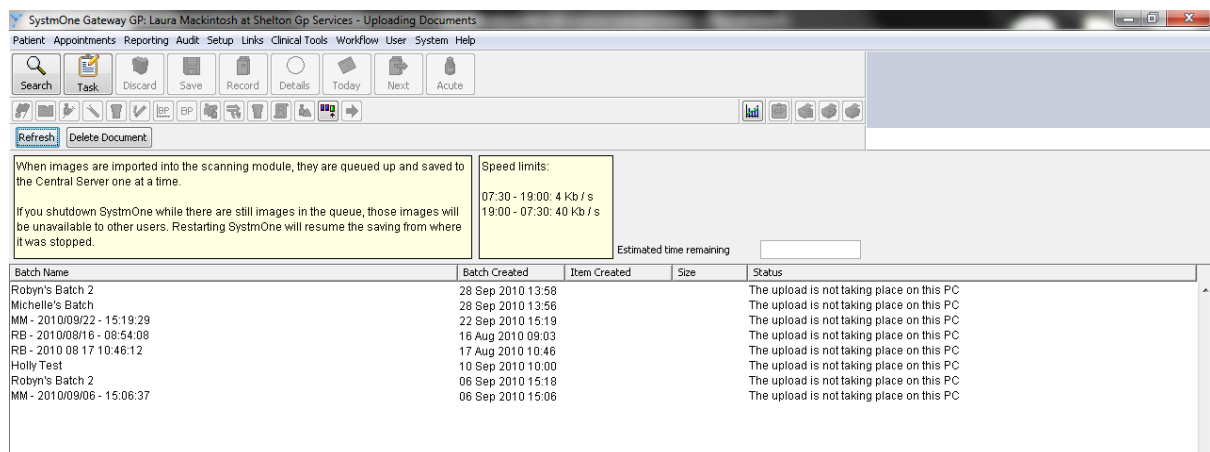


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2. From the Workflow > Document Management > Document Library screen, right click on the image and select Delete image or use the icon.



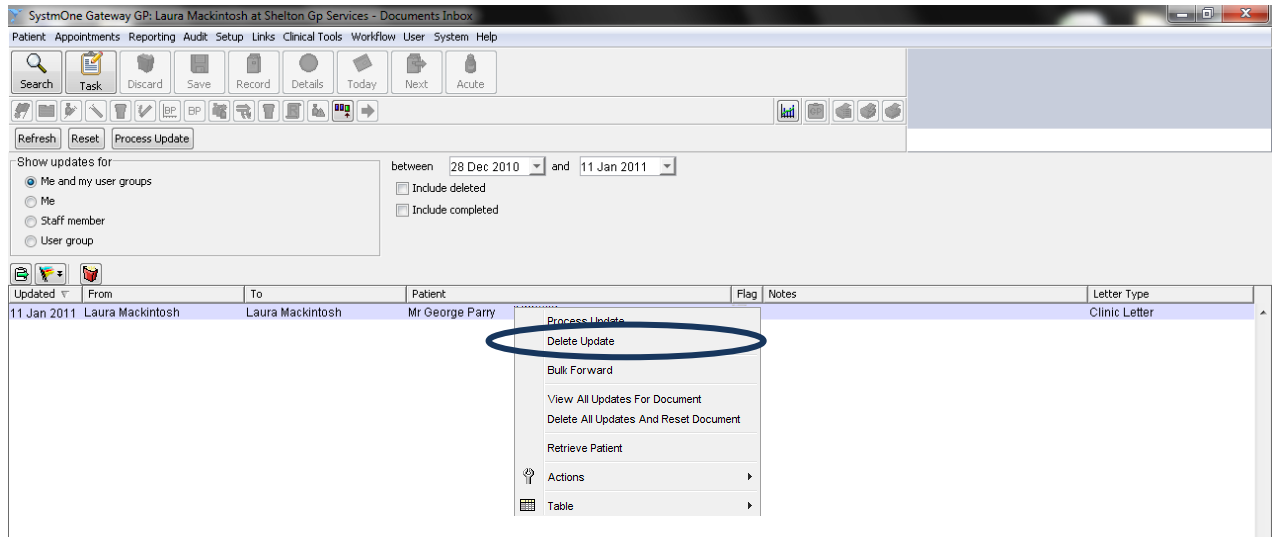
3. From Workflow > Document Management > Uploading Documents screen, right click on a document and select Delete document. This will stop the document from being uploaded when the Gateway is next opened.



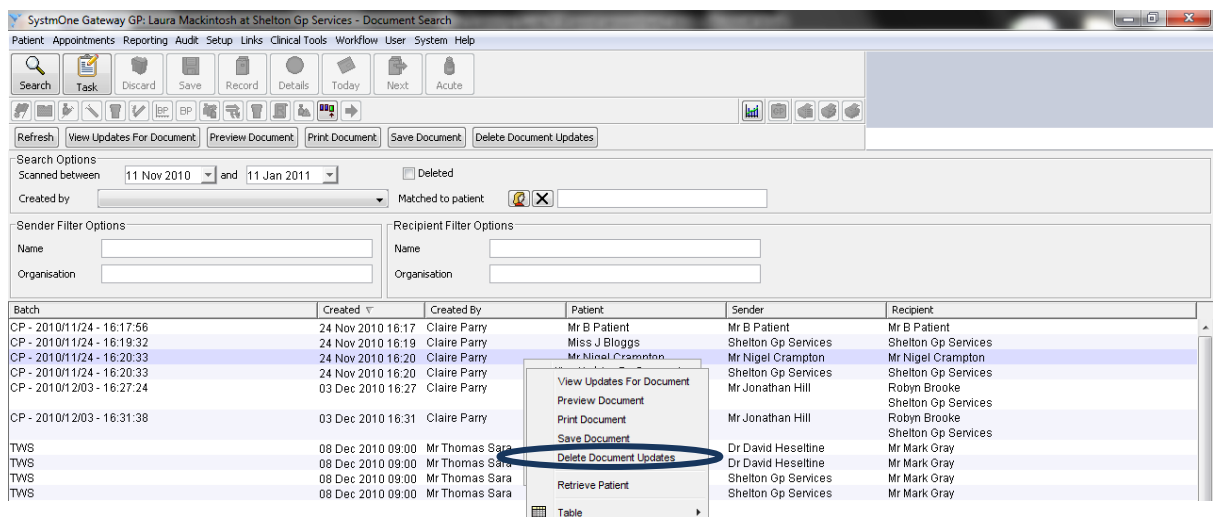
SystemOne PDF guides are correct at the date of writing.

## To Delete Updates for a Scanned Document

1. From Workflow > Document Management > Document Inbox screen, right click on an update and select Delete Update to delete the specific update or right click and select 'delete all updates and reset patient document' to delete all updates to the document and return it to its original state.

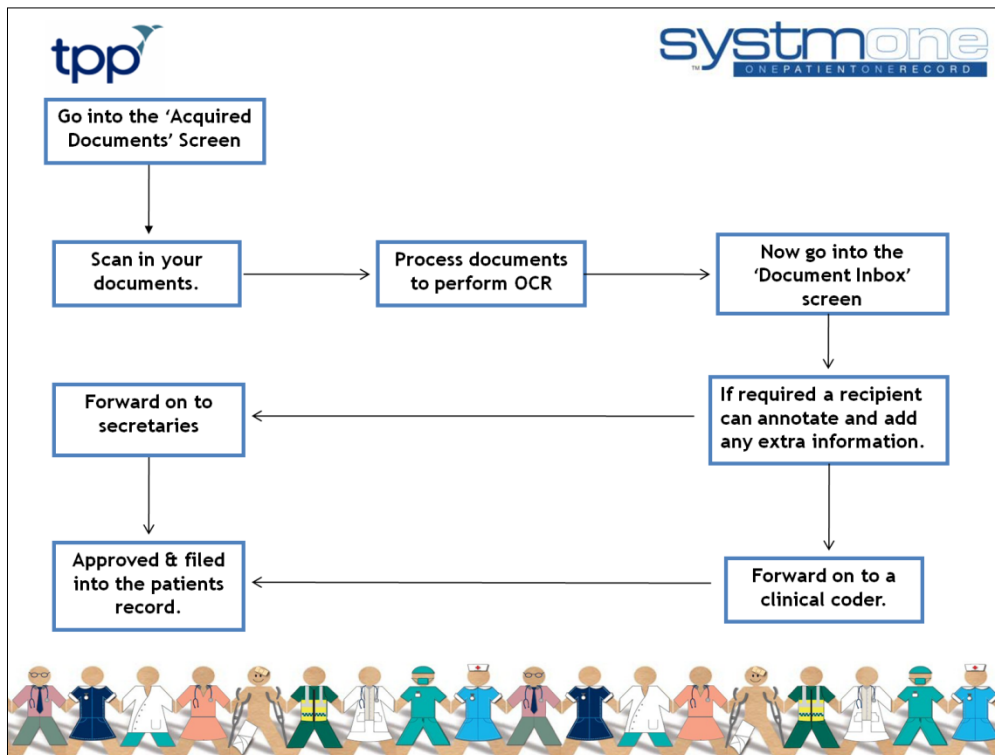
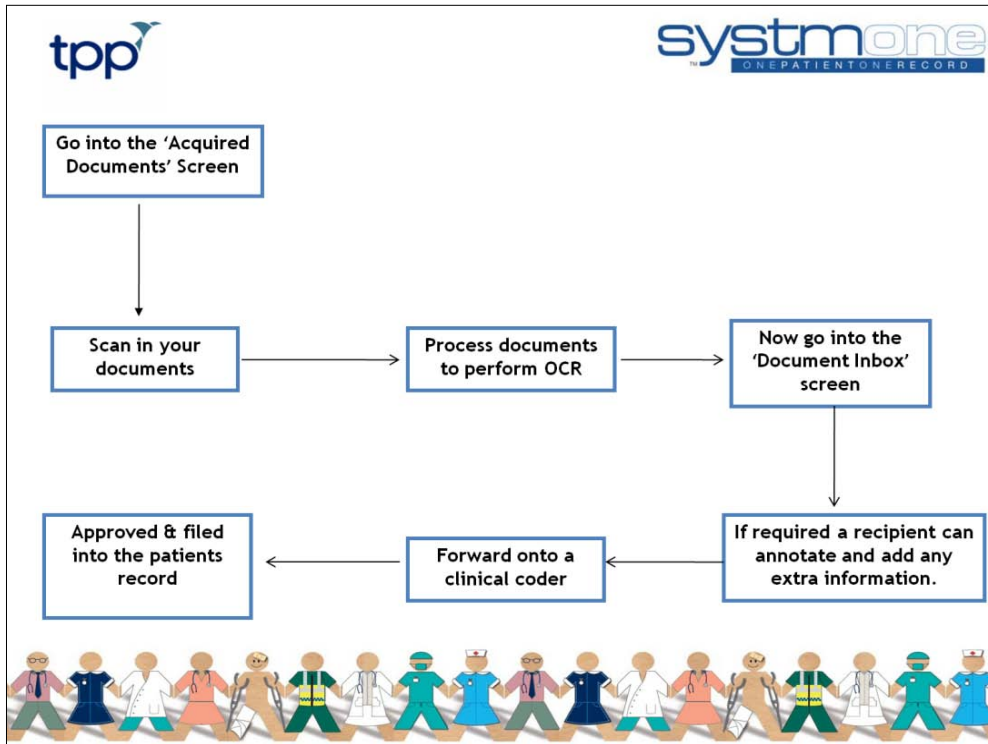


2. From Workflow > Document Management > Document Search screen, right click and select Delete Document Updates.



SystemOne PDF guides are correct at the date of writing.

## Suggested Workflows



SystemOne PDF guides are correct at the date of writing.

