



User Guide

## Patient Visibility Functionality

Docman 10

Author: Charlotte Wood

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**Advanced Computer Software Group Ltd.**

Ditton Park, Riding Court Road, Datchet, Berkshire. SL3 9LL

t: 0845 160 6162 (+44 845 160 6162) | f: +44 (0) 1932 584001

[www.oneadvanced.com](http://www.oneadvanced.com)

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### Version History

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

### Version Approval

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

### Distribution

Date	Version	Name	Title

### Document Control

Filename	Location	Minimum Retention
Docman 10 Patient Visibility User Guide 1.5		

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## Introduction

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

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

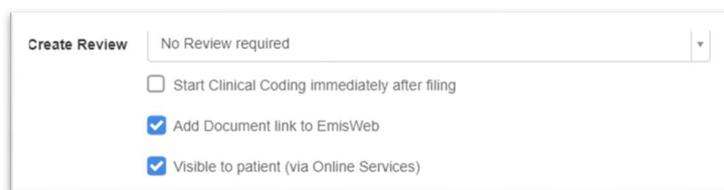
Please read this user guide to understand how to use the new features in Docman 10. Filing and workflowing documents in Docman 10

## Filing and workflowing documents in Docman 10

### Filing – no workflow required

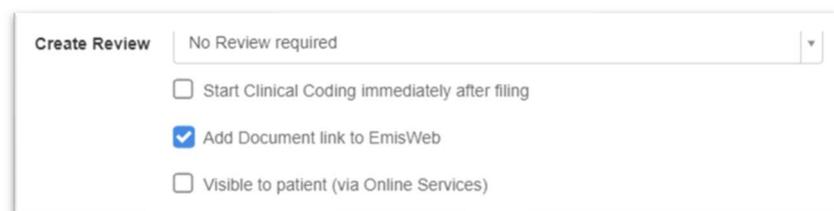
When a document is filed in Docman with 'No Review required' and the 'Add Document link to EmisWeb' tick box is selected, users will be presented with a new option: **Visible to patient (via Online Services)**.

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



The screenshot shows a 'Create Review' form with a dropdown menu set to 'No Review required'. Below the dropdown are three checkboxes: 'Start Clinical Coding immediately after filing' (unchecked), 'Add Document link to EmisWeb' (checked), and 'Visible to patient (via Online Services)' (checked).

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



The screenshot shows the same 'Create Review' form as above, but the 'Visible to patient (via Online Services)' checkbox is now unchecked.

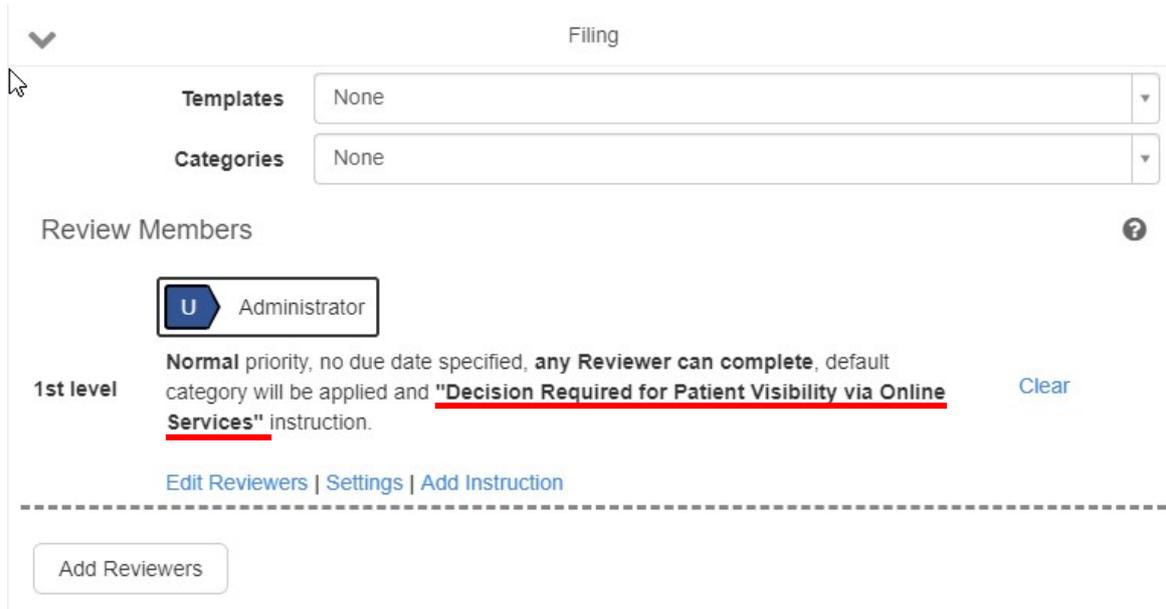
If the user prevents visibility to the patient, the icon below will display in EMIS against the document entry.



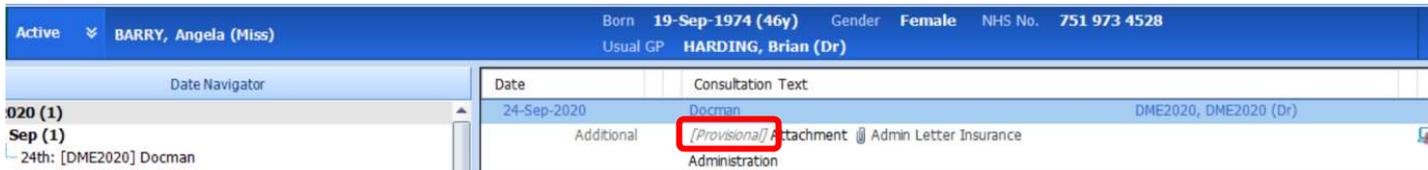
### Filing – workflow required / review required for decision on visibility

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

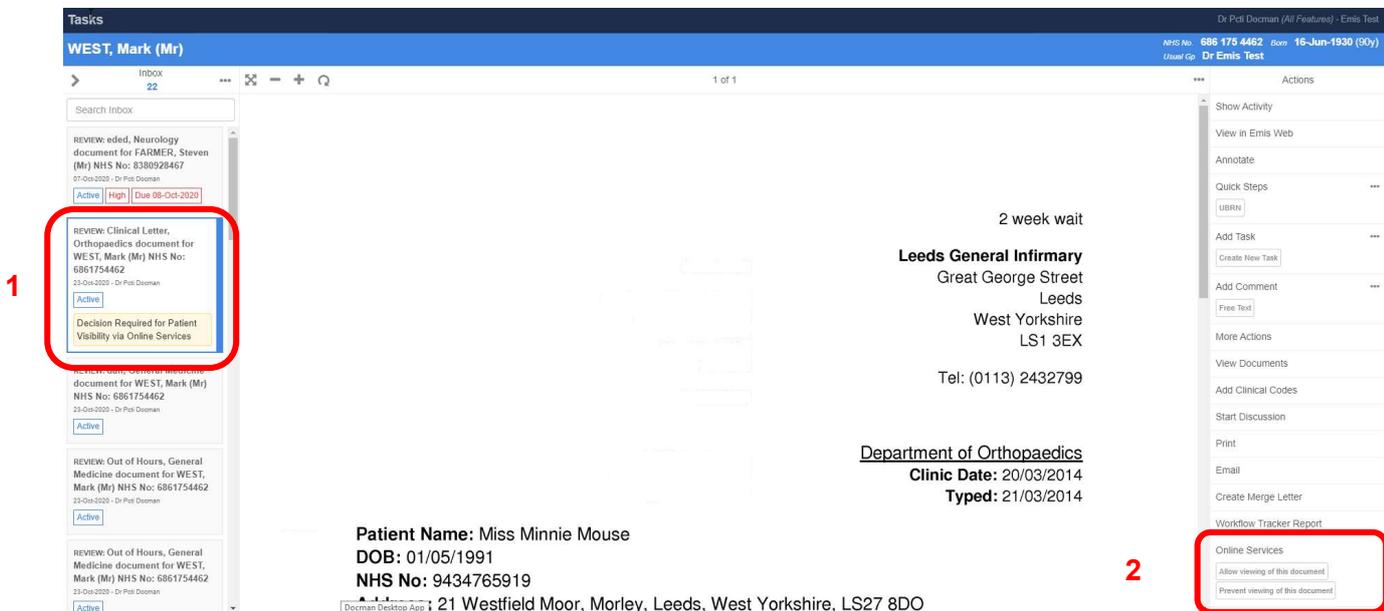
It is advised that the user should add an instruction to the task to inform the recipient that a decision is required for patient visibility via online services. (\*See below for guidance for adding new instructions)

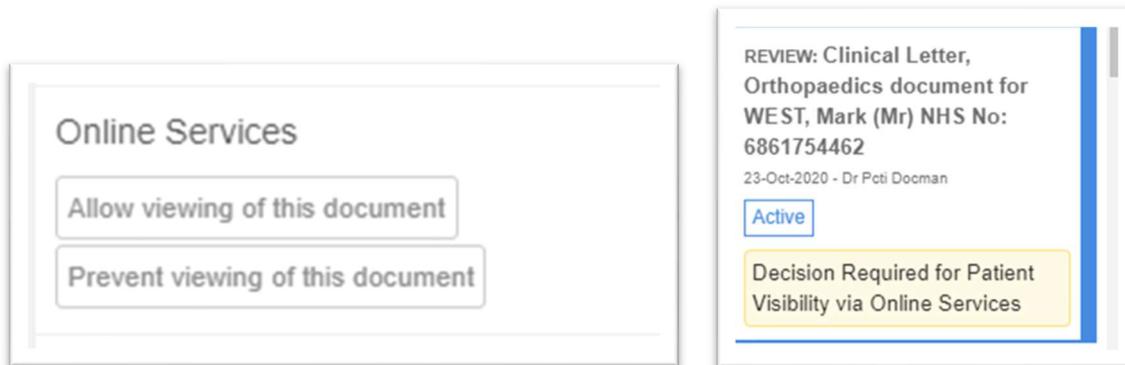


As the document has been sent on for review, the entry in EMIS is marked as provisional and the document is not visible to the patient.



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





### Workflow / Tasks in Docman 10

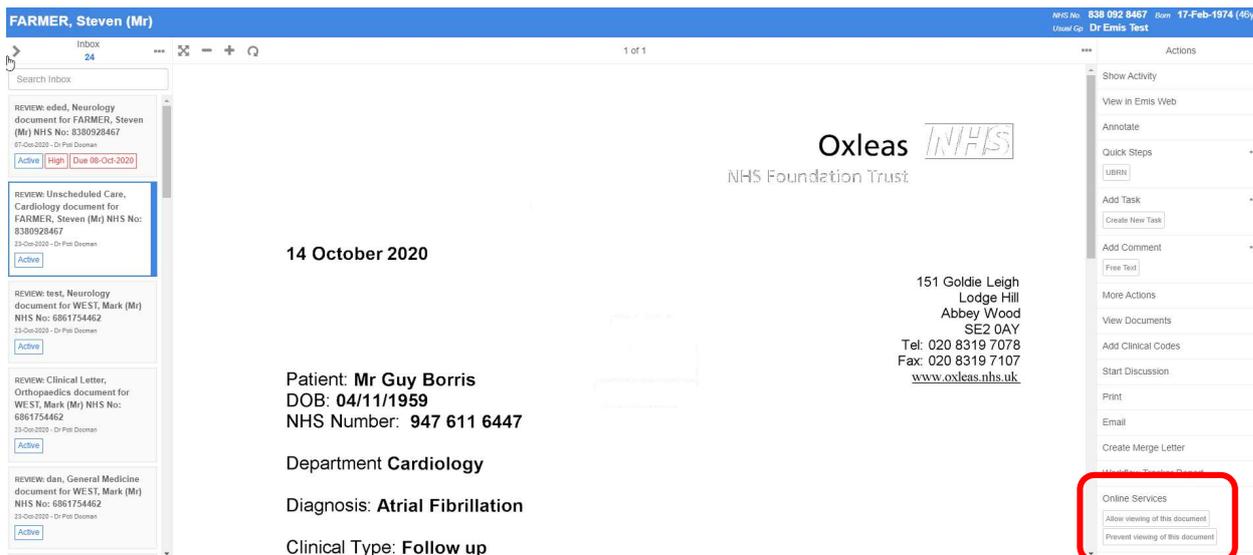
When a document is sent in a task/workflowed in Docman and the 'Add Document link to EmisWeb' tick box is selected, the filer will not have the option to make a decision on the visibility.

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

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

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

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



### Audit in Docman 10

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

**Document History**

**WEST, Mark (Mr)**

Timeline ⋮

- 23-Oct-2020  
09:32

👁️

Administrator

Emis Patient Visibility

Document has been set as viewable for patient in Emis Web
- 09:32

➔

Administrator

Document Filed
- 09:32

📄

Administrator

Document Filed to Clinical System

Seen in general medical clinic - 185241003
- 09:31

+

Administrator

Document Added

**Document History**

**KENT, Leslie (Mr)**

Timeline ⋮

- 23-Oct-2020  
15:47

👁️

Dr Pcti Docman

Emis Patient Visibility

Document has not been set as viewable for patient in Emis Web
- 15:47

🔄

Dr Pcti Docman

Created

Document Review  
Members: Dr Pcti Docman  
Instruction: Decision Required for Patient Visibility via Online Services
- 15:47

👁️

Dr Pcti Docman

Emis Patient Visibility

Document has not been set as viewable for patient in Emis Web
- 15:47

➔

Dr Pcti Docman

Document Filed
- 15:47

📄

Dr Pcti Docman

Document Filed to Clinical System
- 15-Sep-2020  
14:30

+

SYSTEM

Document Added