

## 5.Viewing Patients Documents

*All Users*

### Scenario

*Whilst in your clinical system, or Docman, you will be able to view documents relevant to the patient you are viewing in either/both systems.*

**NB. Due to the Familiarisation Application not being connected to an active clinical system you will not see all the ways of linking to & from the clinical system until you are live.**

### Task

- From the landing page/home screen, **click** in the Quick Search field. Type in a surname of a patient you have already filed a document for (see Task card 2 – Capture & Filing)

*The search defaults to use name, DOB or NHS no. and will allow a combination of all.*

- The results are displayed below in a paged list and you simply **click** on the patient's name to display the patient's documents.

*This is the same screen that you will see if you open a document from your clinical system. Or if you click View Documents from your Task inbox.*

- On the left, the documents are identified by event date, organisation and type, **click** on the chosen document will display the content in the middle section of the screen, with any tasks available displayed on the right-hand side.

Popular functions in this screen are:

View in [Clinical System] This will open the Clinical System and switch it to show the same patient

Download/Print – Self explanatory

View History – Shows the Timeline (Audit trail)

Create review – Will create a new Document review with this patient document

### Outcome

You should now be comfortable with the layout of the screen, the Actions available on the right, and how you may reach this screen from Quick Search, Tasks and your preferred clinical system.