

## 2. Capture & Filing Tasks

### *Scanning and Filing staff*

### Scenario

*During these tasks, you will file documents. You can then send them for review (previously Workflow) or file directly to the patients record.*

*NB: Intellisense will be available on all instances of Docman 10 for the benefit of all users.*

### Task

- From the Home screen, click on Filing in the blue bar – This takes you to the Capture & Filing screen (You can assume that the documents here have been scanned in already, in this instance, you will see a mix of documents named Test, Results, Unscheduled Care, etc)

Working process in Docman 10 is left to right on all screens. On the left, select a folder (for example the folder named 'Not in a folder') & select a document named Test (e.g. Test24), this will display the document in the preview screen, (middle part), and any actions will be subsequently displayed on the right-hand side.

- Click File Document. The document will now be 'read' by Intellisense and will then display its findings on the right. Review these, correct where necessary – Using the green [i] option as per the prompt at the top of the screen. Or manually typing the item in the relevant field, this will prompt a picking list of items, or you can add your own entry in the fields as required.
- Below the filing details checked on the right-hand side you will see Create Review. Choose to 'Start Review immediately after filing', click Save.
- On the next screen, you will be prompted to 'Add Reviewers'. Choose the Clinical user (U) or team/group (G) (relevant to your practice), Click Start.

*NB. If a document does not need to be sent to a user for review, you can choose 'no review required' which will simply file the document to the patients record in the clinical system and Docman.*

### Repeat

*Now, do this with 6 more documents, sending 5 to your chosen clinical user and file 1 more without sending for a review.*

### Outcome

You should now be confident to file a document and send for review by the time you have completed this process 6 times.

**NB. Due to the nature of the familiarisation environment users may witness more duplicate document messages than they would expect in their live environment.**