Managing Docman Efficiently in Practice

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Workshop Topics

➢New User Interface

➢Docman Updates

➢Import & Export

➢Workflow

➢Maintain Lists

➢Patient Record

➢Service Desk & Support Tips

docman

17-19 Hill Street
(Update Available)

Mark Gonnella

In the Office

Settings

Help

Close

File Documents

View Documents

Library

Create Discussion

Reporting

Workflow 1

Patients

Collaborator

BackOffice Apps

Search Documents

Data Sections

Address Book

Human Resources

Overseas Patients

Private Patients

Secured Documents

Notification Centre 12

Docman Updates

Docman Updates

Update Panel

UPDATES

Update is available

▶ Open Update History

▶ Open Update Instructions

- Who updates your Docman?
  - Health Board
  - Microtech
  - Practice

- Updating Docman Tips
  - Everyone needs logged out of Docman
  - Update needs run on the server
  - Microtech Support for assistance

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Import & Export

- How many staff know how to Export & Import the Docman record?
- Saving the correct file type into Docman
  – Clinical Summary as a TIF
  – Don't drop Shortcuts into patient records
- If the Docman Export fails…..**<u>DO NOT</u>** attempt a second export
- Remember to Archive!
- PSD Guidance – Docman Transfer
- What does and doesn't transfer?
- Restoring a Docman Record

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Workflow

- Switching from Standard Workflow to SmartUI
  (Administer System – Configuration & Integration – Workflow Implementation)

- SmartUI Advantages

  – Browse Documents, Phone No, No pop ups

- Manage Views – add new views, remove/adjust old views

- Move Workflows (Bulk Re-Route)

- Completed Workflow

- My Recent Workflows

Maintain Lists

- User Maintenance
  - Inactivate users
  - Move Inactive Users workflows
  - Re-Activate User
- Make sure you have admin cover to reset and unlock users in the practice – not just one user
- New User Functions
  - User Based Reports
  - Move Workflows
  - Add higher rights to existing user
- Maintain Workflow Recipient Groups – Remove Inactivate Users
- Actions & Comments – Review for consistency & relevance. Remove comment. Re-order with new Workflow Interface
- Document Folders should be 48 for Patients Section
- Filing Lists – no blank folders in Administration/Departments/Labs Lists

Patient Record

- Maintaining the Patient Record
  - Copy & Move documents through Select Mode if needing to copy to another patient or file into correct patients record
  - Hide Inactive Folders – Make sure it is Enabled
  - Drag & Drop misfiled documents into the correct folder in a patients record – especially those in the "Not in a Folder" folder
  - Docman Toolbar now stays where dropped under latest versions

Service Desk Hints & Tips

- Checking you Docman Backup
- Change your Practice Name
- Scanner Pads
- Cleaning Scanner Lamps

Questions