

**Programme Documentation**

**MR002 Docman Transfer Project  
Docman Transfer Process – Export and Import Short Guide**

**PSD Strategic Programme Office**

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Owner: Practitioner Services

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# Document History

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**Document Location** This document is only valid on the day it was printed.  
 The source of the document will be found on the project's PC in location:  
 G:\Business Systems\Medical Programme\Programme Support Office\Programme Quality Folders\Configuration Management\Approved\MR002\Med 026 Docman Transfer Process - Export Import - Short Guide - final V1.2.doc and in the relevant file on ePO.

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**Revision History**

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| Revision date | Previous revision date | Summary of Changes                                   | Version          |
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**Approvals** This document requires the following approvals.  
 Signed approval forms are filed in the project files.

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|----------------|-----------|------------------------------------|---------------|---------|
| Tammy Watchorn |           | PSD – Consultant Programme Manager | 29/04/08      | 1.0     |
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| Colin Brown    |           | SCIMP                              | 29/04/08      | 1.0     |
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| Chris McMail   |           | Microtech                          | 29/04/08      | 1.0     |
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**Distribution**

This document has been distributed to:

| Name           | Title                              | Date of Issue | Version |
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| Tammy Watchorn | PSD – Consultant Programme Manager | 29/04/08      | 1.0     |
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| Kevin McInneny | PSD – Project Manager              | 29/04/08      | 1.0     |
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| Mandy Barlow   | PSD – Business Change Manager      | 29/04/08      | 1.0     |
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| All live Docman Transfer GP Practices |           |          | 1.0 |
|                                       |           |          | 1.2 |

## Exporting From Docman

**Warning:** Do not export the Docman record until you have received the deduction for the patient via Partners.

**Recommended:** Before you export we would encourage you to create a wholly electronic Full Patient Record by adding the GP System Record to Docman.

This should be filed in the:

- National Filing Folder Name - **Clinical**
- Description – **GP System Record**
- Organisation – **Exporting Practice Name and Practice Code**

This can now be done directly, without printing. For individual system instructions on how to do this – see: [http://www.scimp.scot.nhs.uk/eRecords\\_docman.html](http://www.scimp.scot.nhs.uk/eRecords_docman.html)

Otherwise, GP Practices should print out the GP System Record and scan into Docman before exporting.

The person responsible for exporting the Docman images within the GP Practice should have the highest available rights (level 9), as any document that has a higher security level than the user would not be exported.

**PLEASE NOTE:** If you have documents scanned using software other than Docman you should import these directly into Docman before export.

### TO EXPORT THE RECORD:

1. Open the patient record in Docman as normal.
2. From the '**Document**' menu, select '**Export**'.
3. This opens the 'Document Export' window. Complete the screen as shown in the screenshot below.

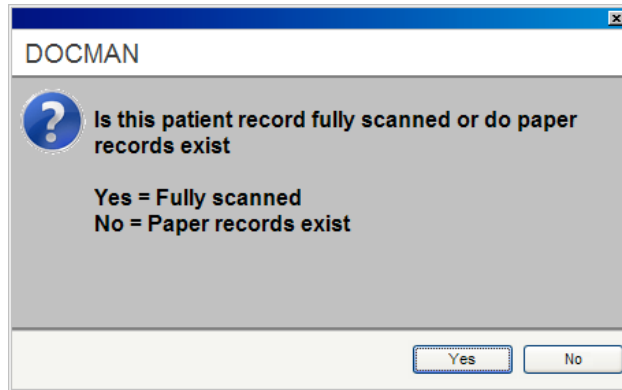
The screenshot shows the 'Document Export' window. The title bar reads 'Document Export'. The main content area displays patient information: 'Patients: Miss Dawn L Edwards 18/05/1973 12a Fulton Street Hillington GLASGOW G523SQ NHS6666 1805737880 Dr Macmerry'. Below this, there are four checkboxes: 'Open export location after completion', 'Encode documents into a single file', 'Copy CD browser files to export location', and 'Remove documents from the patient's record on completion of export'. The 'Remove documents...' checkbox is checked. Below the checkboxes is an 'Export to:' field with the path '\\retrain2\edocs\export'. A warning icon and text state: 'Documents with passwords and documents with a higher access level will be excluded.' At the bottom, there are three buttons: 'Save Location', 'Export', and 'Cancel'. Three callout boxes with arrows point to specific elements: the first points to the 'Remove documents...' checkbox; the second points to the 'Export to:' field; the third points to the 'Export' button.

Ensure this is the only tickbox selected

Check the filepath is correct, it should be: \\servername\edocs\export

Click 'Export'

- You will now be asked if the record is fully scanned.
  - Select **Yes, if fully scanned/added in full** - there are no paper records to follow in any form AND the GP System Record has been added to Docman, either by scanning in a print-out, or by direct import
  - Select **No, if paper records exist** – full record or some other hard copy eg summaries that have not been added to Docman



- Click '**Yes**' to confirm that you wish to archive the patient's record.
- Click '**OK**' on the final two prompts confirming the archive and export.

The export is now complete and you will be returned to the empty patient record.

NB: Remember to attach the completed Patient Transfer Notification Form to the front of the paper medical record before returning to Practitioner Services.

**Temporary Residents:** For those GP Practices that have scanned images for temporary residents on Docman, please print these out and sent to Practitioner Services within your mailbags. Do not export Docman records for temporary residents.

**Correspondence Received After Docman Exported:** If mail is received for the patient after the Docman record has been exported, practices should send the mail to Practitioner Services within their mailbags. PSD staff will then send the mail on to the new Practice as appropriate. Practices should not scan the mail into Docman and re-export the Docman record.

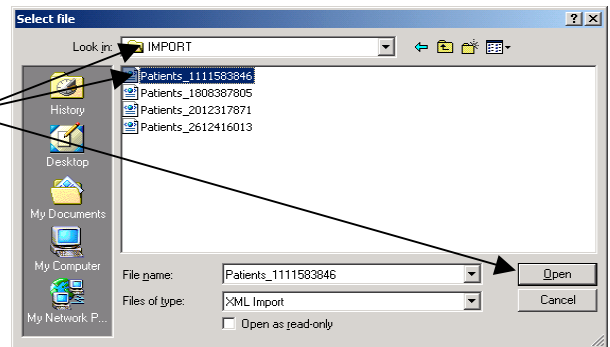
## Importing to Docman

Navigate to the  
Import folder,  
then select the  
record you wish  
to import and  
click 'Open'

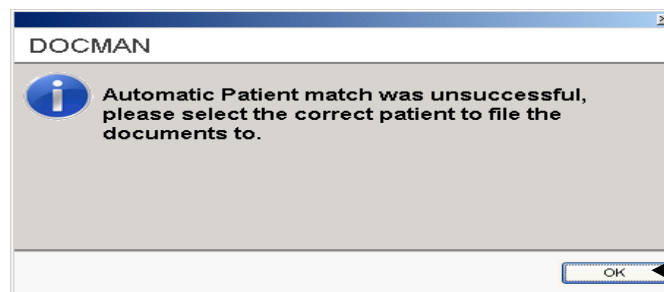
**You should check the import folder on a regular basis.** This is the 'import postbox' where eLinks will place the electronic images for new patients.

1. **Check the CHI number** against your patient list to ensure the patient is registered with you.
2. From the Docman main menu select **'File Documents'** (F2) – the same option used when scanning.
3. In the 'Batch Manager' window, select the **'Capture'** menu, then choose **'Import XML batch'** (shown below).

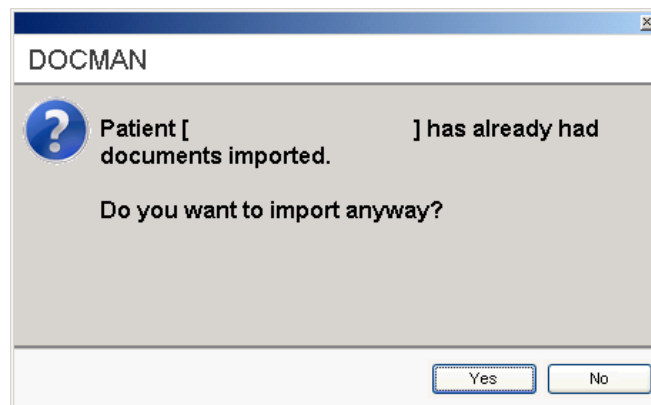
4. In the 'Select File' window, navigate to the Import folder, then select the record you wish to import and click the **'Open'** button (shown right). You only need to select the xml file; you do not need to import the folder.



An hourglass may appear while the system imports the records. If the system does not successfully match the patient then you will be prompted to match the patient manually.



5. At this point the system will check to see if an import has already occurred for this patient. If an import has already taken place the following message will be displayed (including the patient name):

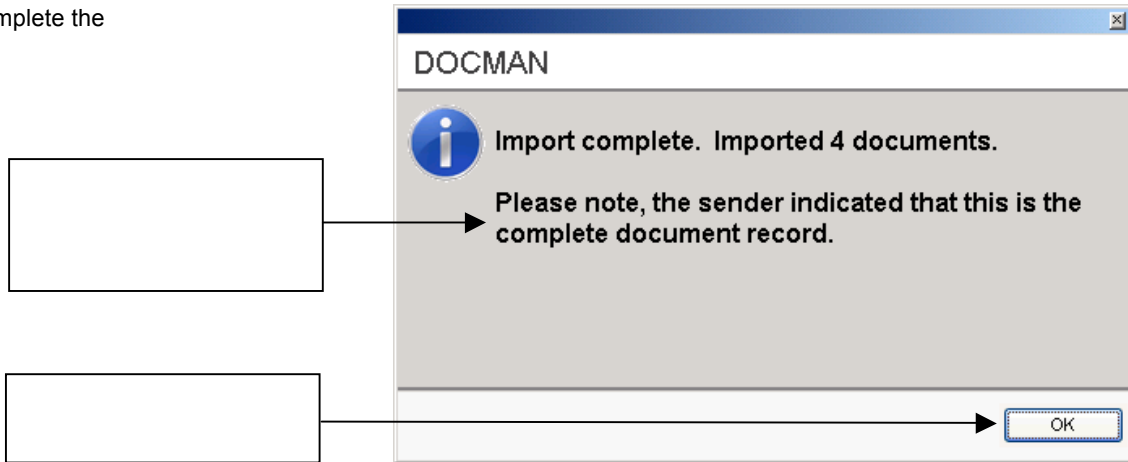


## Importing to Docman

If this message appears you may want to click 'No' and check with your colleagues to confirm whether they have already carried out the import. If you click 'Yes' the import will occur again, leading to duplicate documents in the patient record.

Note the message if the import hasn't taken place previously (or if you click 'Yes' to the above prompt), then a message will appear to confirm that the records have been imported successfully. This message indicates whether a paper record has also been dispatched. You may want to make a note of this message, as it will not be displayed again. Finally click 'OK'.

Click 'Ok' to complete the process.



7. Open the patient record in Docman and check to see if any items are '**Not in a folder**'. Refile any items if necessary, using the '**Document**' menu and selecting '**Edit Filing Details**'.
8. Check that all records have been imported before running the '**Docman Import Archive**' via the shortcut on your desktop.

**Please note:** You should update the clinical system to show medical records received once the complete medical record has been received by the GP Practice, irrespective of the combination, eg paper only, paper plus Docman or Docman only, but only on receipt of the complete record.