Document Sharing – Delivery of Documents to Practices via Docman 10

Quick Reference Guide

The Connecting Care document sharing solution enables Practices to receive and view clinical documents directly into Docman 10, without having to download them from the CDS portal or receive them via other methods.

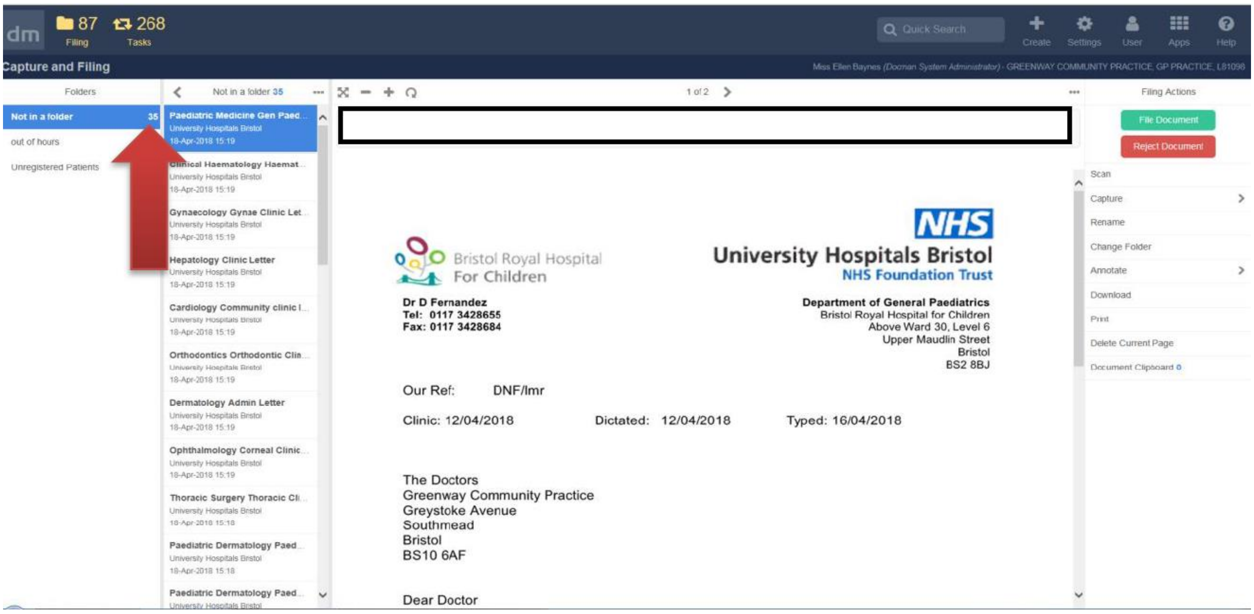
1. Set-up

Documents will be delivered into the Practice's Docman Scheduler. The Docman Scheduler runs in the background of the chosen workstation and runs collection tasks automatically. The collection tasks are pre-configured and do not need to be created by the practice.

2. Receiving documents

The Scheduler collects documents into **Capture and Filing** ready for filing. To view these documents, go into the **File Documents** section from the Docman main menu.

The document will appear under **'Capture and Filing'** and will arrive in the **'Not in a Folder'** folder.



3. How do I accept/process documents that have come through Document Sharing?

The document can be opened by double clicking on the document from the **document List.** If you are happy with the document, you can continue onto file / code the document as per your normal document process.

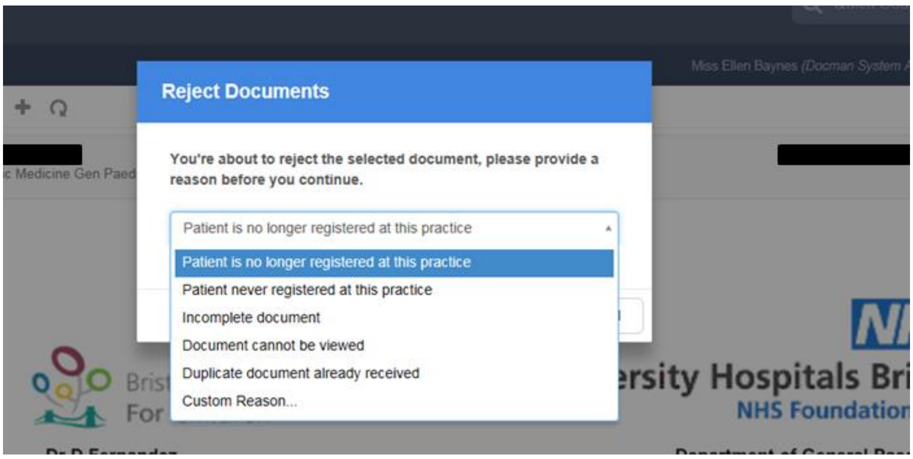
Once the document has been processed it will disappear from the **Batch List**

4. How do I reject a document?

A practice will occasionally need to reject a document because the document is incomplete, illegible or relates to a patient that is not registered at the practice.

To reject a document, click the Reject Document option to the right under **'Filing Actions'**

Docman will then prompt you for a rejection reason.



Click the most relevant rejection reason from the list to select and confirm the rejection of the document.

**The rejection reasons are pre-configured within Docman and cannot be changed by Connecting Care.*

This rejection is fed back to the Trusts for action / update. If you reject a UHB document in error you can log into the CDS portal to retrieve the document.