

Document Delivery – Frequently Asked Questions

1. What is document delivery?

The aim of this project is to deliver the capability to enable **any** Connecting Care partner to share **any type** of document with **any** other Connecting Care partner¹. To do this we are basing all of our work on generic document sharing functions that **utilise national / international technical standards** (XDS² and ITK³).

These functions enable documents to be -

- shared within the shared digital care record (Connecting Care 'portal')
- and sent on to a new destination / location (e.g. to a GP practice)

2. Which organisations are documents available from?

All documents from **UHBW (Bristol)**, some documents from **North Bristol Trust** and Discharge Summaries from **UHBW (Weston)**, are delivered electronically into the chosen workflow of GP practices.

3. Are all documents from UHBW (Bristol) delivered by Connecting Care?

Connecting Care can deliver any documents that are currently available from the CDS portal. In order for a document to be delivered to your practice workflow, its metadata must contain:

- A destination GP practice ODS Code (so that we know where to send it)
- A valid NHS number (so that we know who the document related to)

¹ IG and role approvals permitting

² Cross-Enterprise Document Sharing (XDS) is focused on providing a standards-based specification for managing the sharing of documents. This is managed through federated document repositories and a document registry

³ The Interoperability Toolkit (ITK) is a set of common specifications, frameworks and implementation guides to support interoperability within local organisations and across local health and social care communities. ITK uses open international standards and is aligned with HL7 and 'Integrating the Healthcare Enterprise' (IHE)

4. What documents from North Bristol Trust available via Connecting Care?

NBT documents are currently available from the following services -

- Rheumatology
- Neuropsychology
- Neuropsychiatry
- Neurophysiology
- Burns
- Occupational Therapy
- Physiotherapy
- Neurosurgery
- Antenatal
- Fertility
- Gynaecology and Obstetrics
- Bristol Speech and Language Therapy
- Dietetics
- Pain Clinic/Pain Management
- Breast Screening and Symptomatic services
- Neurology
- Stroke
- ED Discharge Summaries

Starting from July 2018, clinic letters from each outpatient specialty will be phased in by NBT so that all outpatient clinic letters become available.

5. How can we 'sign-up' for document delivery?

The rollout of this functionality has been managed in batches. All GP practices have been contacted by the Connecting Care team.

If your practice has still not been enabled then please contact the Connecting Care team as soon as possible at connectingcare.info@nhs.net

6. Do I still need to use the CDS portal for UHB documents?

Once your practice has been enabled to start receiving documents via Connecting Care, you will not need to log-in to the CDS portal to collect your documents every day; they will just be sent to you.

The CDS portal will continue to be available for some time whilst this functionality is rolled out to practices.

7. Will documents that have been sent via Connecting Care still be in CDS?

Yes – all documents will still be available as normal in CDS. This is because not all practices are using Connecting Care for their document delivery yet

Any queries relating to CDS should be directed to the CDS team at UHBW (Bristol) CDSSupport@uhbristol.nhs.uk

8. Can documents be viewed in Connecting Care?

Yes – all available documents for a patient that are held in CDS are visible in the Connecting Care portal.

Further information on access to Connecting Care can be found [here](#)

9. How will I receive documents in my practice?

Clinical documents will be delivered directly into your chosen practice workflow; either EMIS workflow or Docman.

- For **EMIS** workflow; documents are delivered directly into the Document Management inbox in the EMIS Workflow Manager
- For **Docman and Docman 10** users; the EDT scheduler collects documents into **Batch Manager** ready for filing

Guidance documents are available at:

<https://connectingcare-info.scwcsu.nhs.uk/help/document-sharing.aspx>

10. Is any configuration needed at the practice to start receiving Documents from Connecting Care?

No additional configuration will be required in the practice.

Connecting Care asked practices some time ago which practice workflow tool they would like to use to receive their documents. Any required set-up / technical configuration has already been carried out.

11. How do I set-up the EMIS workflow to send documents to specific users / GPs in my practice?

Workflow configuration is managed at the practice. Connecting Care just delivers the document to the **Document Management** inbox. Once it is has been delivered to the **Document Management** inbox, the workflow settings already configured determine what happens to that document.

Further guidance on configuring the EMIS workflow for document management can be found on the EMIS Support Centre:

<https://supportcentre.emishealth.com/help/workflow-manager/document-management/configuring-document-management/>

Alternatively you can contact the EMIS support team for further assistance with setting up the workflow.

12. Why is a document available on the CDS portal before it is delivered to my practice workflow?

A document has to be made available in CDS before it can be registered and delivered by Connecting Care.

In order for a document to be delivered it must have a verified NHS number⁴

The NHS number status is not always available immediately. If it is not available when the document is initially registered in Connecting Care, the system will automatically check and resend the document as soon as it is available.

In most cases documents will be delivered as soon as they are available; the process outlined above helps to ensure that clinical documentation is delivered reliably and quickly.

13. Does the “Reject” button send the document back to the hospital trust?

No. The reject functionality (either in EMIS workflow or DocMan) notifies the sender that the document has been rejected. The document itself does not get “sent back”.

Rejections are reported back to the Trust using a delivery status report in the Connecting Care portal – this is viewed by the trust teams to check on the status of the documents being sent. The team will action the rejections as necessary (depending on the reason the document has been rejected).

If you have a query regarding a specific document sent from **UH Bristol**, please contact the Clinical Systems Support Team CDSSupport@uhbristol.nhs.uk

14. Why can't I see the “Reject” button in my EMIS workflow?

The availability of the **Reject** button is dependent on a number of factors in EMIS workflow:

- There must be **no completed tasks** on the document
- The document must be “**unmatched**” – the reject button will not appear if the patient is matched.
- The document **must not be open** – it has to be rejected from the “unmatched” document area.

Individual practice configuration of the EMIS workflow can also impact the **Reject** functionality. Please contact EMIS if you require further assistance with workflow configuration.

⁴ The NHS number is traced from the UHB Patient Administration System (Medway). This is an automatic process that helps to ensure that NHS numbers are correctly and accurately recorded. Connecting Care uses the NHS number to ensure that the document is ‘matched’ to the correct patient in the system.

15. My practice is upgrading to Docman 10. Can we still have documents delivered from Connecting Care?

Yes. Documents can be delivered to the new version of Docman in the same way as they are currently.

If you have a planned date for your upgrade to take place, please contact us to advise of the date at connectingcare.info@nhs.net

16. Who do I contact if I need help with my practice Docman configuration?

Any questions relating to your practice Docman set-up should continue to be raised with Docman support as normal – contact details can be found at:

<https://www.docman.com/primary-care-customers/>

The Connecting Care team are unable to assist with Docman configuration or set up of the scheduler.

17. I have received a Discharge summary for a newborn baby, not registered at the practice. What do I do with it?

Currently many practices are sending Discharge Summaries back to trusts that are received for new-born babies. This is because there is no record to attach the document to because the baby has not been registered at the practice.

The best way to deal with these is really dependant on how the document workflow is used in your practice. For example one practice has advised that they workflow the unmatched patient to the person in their practice that contacts parents to register the baby. Once the baby is registered the document is filed as normal; this has helped to ensure that the document doesn't keep bouncing back to the sender.

18. What happens when Connecting Care perform their monthly 'downtime'?

Once a month Connecting Care takes the portal offline to perform essential maintenance and update features. This will usually be during the day and will last a matter of hours, though this could be longer for larger updates.

During this time documents from Trusts will not be delivered into your chosen workflow. These documents will be available as soon as the portal is back online. Communications will be sent out as usual informing of downtime periods.

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