

## Document Sharing – Delivered Documents Report

### Quick Reference Guide

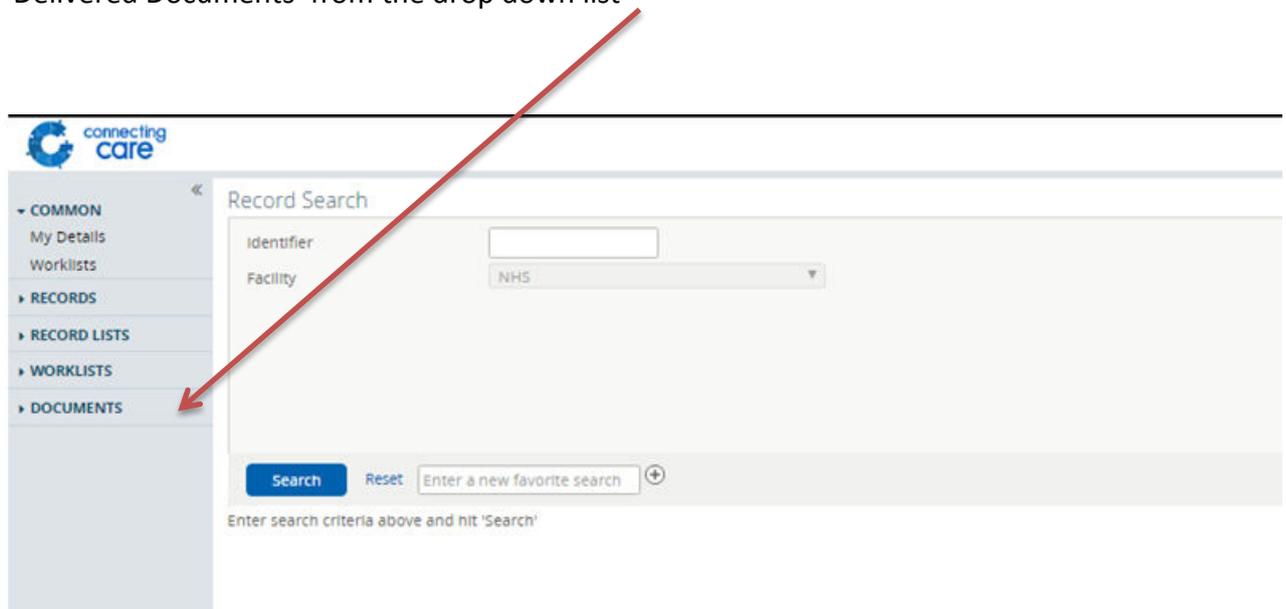
The Connecting Care document report manager is available within the Connecting Care portal and allows authorised users with a Connecting Care GP\* role to check the status of any document assigned to the practice. From here you can see the status of any documents that have been sent to you.

The information provided is designed to be a guide to help users troubleshoot any issues with their document delivery system to either rule out an issue or to be better informed before escalating the issue to be resolved

To access the report manager within the Connecting Care portal please follow the steps below.

#### 1. You will need to first launch the portal and log into the Connecting Care system

To the left hand side of the screen you will see a list- select 'Documents' and then select 'Delivered Documents' from the drop down list



\*You do not need to be a GP to have the 'GP Role' within Connecting Care but you must be authorised by the relevant person within the practice to be assigned this access.

**2. From here you will be able to input specific details to help you locate specific documents.**

You are able to filter your search for a document by Date range, Patient ID, NHS Number and Speciality/Treatment Function

The screenshot shows a search interface for 'Delivered Documents'. The search criteria section includes:

- Date: [ ] to [ ]
- Patient ID: [ ]
- Recipient: [ ]
- Speciality/Treatment Function: [ ]
- Status:  Registered,  Sent,  Received,  Accepted,  Failed,  Rejected,  Not Mapped,  Not Routed,  Relayed,  Manual Retry
- NHS Number: [ ]
- Document ID: [ ]

Buttons: Search, Reset, Enter a new favorite search (+)

Retry Status	Date	Document ID	Patient NHS Number	Patient ID	Patient Name	Title	Author	Speciality	Organisation	Intended Recipient	Destination System	Document Status	Document Status Desc
<b>RETRY EXPIRED</b>	15-07-2018	urn:uuid:9d4105ff-13e7-4e30-9993-01c0da2dc9cf		(NBTLPAS)		ED Discharge Summary - GP	DR	Accident & Emergency	NBT	PRIMARY CARE CENTRE		Failed	Failed to retrieve the Date of Birth

**3. Next you will need to select the document status you would like to view. If you would like to check the status of all documents sent to the practice then select all of the boxes**

Status filters:

- Registered
- Sent
- Received
- Accepted
- Failed
- Rejected
- Not Mapped
- Not Routed
- Relayed
- Manual Retry

NHS Number: [ ]

Document ID: [ ]

**4. The table below examples what the different document status's mean**

<b>Status</b>	<b>This means...</b>
Registered	The system has registered that there is a document in CDS to be sent to the target system (Emis or Docman)
Sent	The Document has been sent to the target system (Emis or Docman)
Received	The Document has been received by the target system (Emis or Docman)
Accepted	Users at the practice have accepted (usually by opening) the document
Failed	The Document has failed to send to the target system (Emis or Docman). More information on this below.
Rejected	The Document has been rejected by the practice. If this has been done in error you can either download it directly from the delivery report or do a manual retry.
Not Mapped	There is insufficient information within the document to map to a specific patient or practice
Not Routed	The document has failed to route to a target system (Emis or Docman) and should be resolved by the trust
Relayed	The document has been sent to practices within the North Somerset area.
Manual Retry	The document has been manually resent via the document delivery report

## 5. If a document has failed it will give a brief explanation of why it has failed

The system will automatically attempt to resend failed documents for up to two weeks after a document has failed

Date	Document ID	number	name	Title	Author	Specialty	Organisation	Intended Recipient	Destination System	Document Status	Document Status Desc
03-04-2018	2.16.840.1.113883.2.1.3.33.1.1.20.5935960			Neurophysiology Inpatients Neurophysiology Consent	University Hospitals Bristol	Neurophysiology Inpatients	UHB	L81066 (Stafford Medical Group)		Failed	Failed to retrieve a Traced & Verified NHS number
03-04-2018	2.16.840.1.113883.2.1.3.33.1.1.20.5935957	713 059 0653 ( 02)	T7878358 (UHBPAS)	Max Bradley White	Neurophysiology Inpatients	University Hospitals Bristol	UHB	L81066 (Stafford Medical Group)		Failed	Failed to retrieve a Traced & Verified NHS number

## 6. Manually retry failed documents

You can click on the circular arrow to the left of the document information and manually retry sending a failed document.

Delivered Documents Select a favorite search

Date  to

Status  Registered  Sent  Received  Accepted  Failed  Rejected  Not Mapped  Not Routed  Relayed  Manual Retry

Patient ID  NHS Number

Recipient  Document ID

Specialty/Treatment Function

Enter a new favorite search

Retry Status	Date	Document ID	Patient NHS Number	Patient ID	Patient Name	Title	Author	Specialty	Organisation	Intended Recipient	Destination System	Document Status	Document Status Desc
 <b>RETRY EXPIRED</b>	15-07-2018	urn:uuid:9d4105ff-13e7-4e30-9993-01c0da2dc9cf		(NBTLPAS)		ED Discharge Summary - GP	DR	Accident & Emergency	NBT		PRIMARY CARE CENTRE)	Failed	Failed to retrieve the Date of Birth

## 7. Rejected Documents

By selecting 'Rejected' from the document filter list you will be able to see all documents that have been rejected by the practice and a brief explanation of why

Destination System	Document Status	Document Status Desc	Document Reject Reason
Docman	Rejected	Rejected by target system	REJ01 - Patient is no longer registered at this practice
Docman	Rejected	Rejected by target system	REJ04 - Document cannot be viewed

## 8. View and download a document

By clicking on the document ID you will be able to view the document in a separate pop up window and download.

Delivered Documents Select a favorite search

Date:  to

Status:  Registered  
 Sent  
 Received  
 Accepted

Patient ID:

Recipient:

Specialty/Treatment Function: **Adult Accident & Emergency**

Retry Status	Date	Document ID	nation m	Document Status
<b>RETRY EXPIRED</b>	15-07-2018	urn:uuid:9d4105ff-13e7-4e30-9993-01c0da2dc9cf		Failed

https://uat-connectingcare.swcsu.nhs.uk/cViewer/process.action?encryptedRequest=3C1C340AC0A1618...

### Emergency Department Discharge Summary



North Bristol NHS Trust  
Emergency Department  
Southmead Hospital  
Southmead Road  
Westbury-on-Trym  
Bristol  
BS10 5NB  
www.nbt.nhs.uk  
0117 414 5100

Letter Date: 15/07/2018

Patient Demographics	Attendance Details
Patient Name :	Date & Time of Arrival : 14/07/2018 20:57
Date of Birth :	Referrer Details
Gender : Male	Self / Family / Friends / Education / Work / Colleague
Number :	Discharge Details
Hospital Number	Date and Time of Discharge : 15/07/2018 00:24

8.50 x 11.00 in

## 9. To start a new search, select 'reset'

Delivered Documents Select a favorite search ▼

Date  to

Status  Registered  
 Sent  
 Received  
 Accepted  
 Failed  
 Rejected  
 Not Mapped  
 Not Routed  
 Relayed  
 Manual Retry

Patient ID

Recipient

Specialty/Treatment Function

NHS Number

Document ID

Retry Status	Date	Document ID	Patient NHS Number	Patient ID	Patient Name	Title	Author	Specialty	Organisation	Intended Recipient	Destination System	Document Status	Document Status Desc
<b>RETRY EXPIRED</b>	15-07-2018	urn:uuid:9d4105ff-13e7-4e30-9993-01c0da2dc9cf		(NBTLPAS)		ED Discharge Summary - GP	DR	Accident & Emergency	NBT	'	PRIMARY CARE CENTRE)	Failed	Failed to retrieve the Date of Birth

For further advice and guidance on any issues experienced with document delivery please contact us at [connectingcare.info@nhs.net](mailto:connectingcare.info@nhs.net)