DAY 1 Get familiar with the new screens

The first day is just about getting to grips with the new screen, and learning how to do the same workflow you're used to. To start with, you may find it takes a bit of time to get used to the new layout – **don't panic**!

You don't need to do any additional setup to start using the new Document Management screen. **All of your documents will appear in the Document Management screen,** even if you were mid-workflow in the old screens.

***Before you start:** Set your filters to "**All**", on both the Prepare and Match screens.*

Understanding the **Document Management** screen

The main screen has three tabs – **Prepare**, **Match**, and **Process**.
All of your documents **will be accessible** from one of these at any given time.

Prepare	Match	Process
For **managing batches** and dealing with the **basic formatting** of each document.	For viewing **suggested matches** and letter details e.g. Patient, Date, Type, Sender, and Recipient.	For **viewing and processing forwarded documents**. This is essentially the Document Inbox!
• **Merge, split, delete,** and **reorder** pages. • Assign **Batches.**	• **Process** the letter. • **Amend suggestions** one by one, or in bulk. • Apply **Workflow Rules**. • **Complete** letter(s) without taking further action.	• **Process** the letter. • **Revert** the document to the Prepare stage.

Understanding the **Document Processing** window

When you choose to process a letter (from the Match or Process tabs), this launches the new Document Processing dialog. This has three tabs – **Admin**, **Clinical**, and **Visualisation**.

Admin	Clinical	Visualisation
For recording or amending **administrative data** about the letter.	For recording or amending **clinical data** about the letter.	For view and using configurable **Visualisations.**
Record/amend: • The **patient**. • The **details** of the letter (the date, type, sender, recipient). • The **visibility** of the data.	• Tick / untick **suggested codes** (from Scanning Rules). • Record **Clinical data** (Codes, Flags, Problems, Notes, Activity details). • **Link** to existing data (Problems, Referrals). • **Complete**, **Save,** or **Forward** the letter.	• **See the patient's data** via a Visualisation. • **Add data** to the patient via a Visualisation.

WEEK 1 Start benefitting from the switch

To help **speed up** your letter processing, we've summarised the key ways some of the new features can enhance your workflow. Spending a few minutes now will save you **lots of time** going forward!

Optimise your **Organisation Preferences**

What you want	Where (under Scanning)	More detail
Always set your organisation to be the letter recipient	> Document Processing > **'Set the recipient to the current organisation'**	If you always want the letter **recipient to be your organisation,** tick this preference and it will automatically be set for all letters going forwards.
Match address book entries as the sender for letters from Tasks	> Document Processing > **'Use the sender from the task'**	If the suggested sender for letters from Tasks often needs amending, it may be because it's **coming from the Task.** Untick this preference and address book suggestions will kick in instead.
Import all of your letter Tasks	> Tasks > **'Bulk Import'**	You can now **include ALL letter tasks** by default as part of an import. Simply tick each Task Type that you want to include. ***Hint***: *Optionally, also set a default Letter Type.*

Hint: *Get help from a System Administrator if needed to update the Organisation Preferences.*

Customise the **look**

Add / hide columns	The **Document Management** screen lets you choose which columns you want on the Match and Process tabs. • Simply right-click on the table > Table > Configure Columns. • This will open a dialog where you can add / remove columns e.g. Letter Date on the Process tab.
Expand / collapse rows	The Document Processing window lets you choose which rows you want to expand or collapse by default. Simply right-click on the (blue/lilac) row, and choose whether you want to **expand or collapse that section** next time, or **expand or collapse all sections**. ***Example***: *You might want to collapse Admin details if you are a coder.*

Instant **benefits**

Bulk OCR	The **Match** tab lets you **perform OCR in bulk**, so you don't have to do this one-by-one. The OCR suggestions are saved in the background, for when you're ready. Drag or ctrl + click to select, then press the icon shown.
Bulk Update	The **Match** tab also lets you **change letter details in bulk**, e.g. if you have a group of letters all from the same sender. Drag or ctrl + click to select, then press the icon shown.
Import overnight	You can schedule an **automatic import** (e.g. overnight) of your letters from NHS mail and Tasks. Choose whether you want to OCR automatically as well, and your letters will be **ready to work on when you come in.** Set this up via Setup > Users & Policy > Scheduled Jobs.

MONTH 1 Automate your work

By now you should be seeing real benefits from the new features. Below, we go into how to really start **automating how letters are processed,** so you can let the system do the work for you!

Save time using **Scanning Rules**

Setup > Referrals & Letters > Scanning Rules

If you find that the **same phrases often appear** in certain letters, you can create a rule to automatically set the right information when the system finds that text in a letter.

Phrase(s) in the letter

- **Letter Type**
- **Sender**
- **Recipient**
- **Codes**

Examples:

Phrase found	***Output***
"Body Mass Index" or "BMI"	***Add code:*** *No diabetic retinopathy (201141000000103)*
"Osteoporosis Service" and "Horsforth Hospital"	***Set sender:*** *MSK Horsforth Hospital*

***Hint**: Seeing too many suggestions? You may need to delete some old rules.*

***Hint:** Think about whether all of the phrases need to appear, or just one. You can configure the rule as needed.*

***Hint:** There are system-wide rules available too – simply tick to enable if these work for you.*

Link to training videos

Automate your actions with **Workflow Rules**

Workflow > Document Management > Document Management Workflow Rules

Workflow rules can take details about the letter and use this to set some important details for you. You can even automatically **code**, **complete**, or **forward** letters.

Input	**Output**	**Actions**
Feed in any combination of: • **Sender**(s) • **Recipient**(s) • **Letter type**(s) • **Free text**	To automatically add or set: • **Sharing visibility** • **Online visibility** • **Flag** • Send a **Task** • Add some **codes**	And do one of the following next Actions: • **Complete later**, saving as draft • **Forward**, e.g. to a team or staff • **Complete**, saving the letter

Example:

- ***Letter type*** *= "Diabetic Eye Screening Scheme"*
- ***Containing text**: "R0M0" or "No abnormalities detected" or "Retinopathy absent"*

Can be automatically coded and completed to the patient record – no manual processing!

***Hint:** The LMS videos go into much more detail and have more ideas for how you can use Workflow Rules if you're not sure where to start.*