## How to prevent patient online access to documents before they are filed – EMIS and Systmone

## <mark>Important</mark>

If a document is fully processed and filed into the record *before* the document is prevented from being visible online, then the patient will be able to view the document online in between these two actions. It is important for all staff involved in document processing to be aware of how to prevent online access to a document *whilst* it is being processed and before it is filed into the record, to avoid the patient inadvertently being able to view the document.

## Scanners (both EMIS and SystmOne)

At the scanning stage, the staff member scanning the document onto the record initially could also go into the patient record as described below after they have scanned in the document and prevent online access as soon as a document is scanned and before it is processed and filed by the clinician.

## Administrators (both EMIS and SystmOne)

In some surgeries, administrators have been trained to fully complete the processing of a document including the filing of that document into the record without a clinician viewing the document at any stage in the process. These administrators would also need to follow the processes below to prevent patient online access to the document.

#### **Surgery Processes**

Each surgery organises the processing of documents in a slightly different way. It is recommended that each surgery reviews how they process their documents in light of the above, and before the launch of the accelerating patient online access.

EMIS (including Docman) Page 2 SystmOne Page 4

Author: Michelle Sharma, Named GP for Safeguarding, Swindon Locality michelle.sharma@nhs.net

## EMIS

When an entry has been marked as not for online access, it will be represented by a small icon of a computer with a red cross on it:



Most Emis surgeries use Docman to process their documents, but they can be received and processed directly within Emis as well. Instructions for preventing online access via both Docman and directly in Emis are below.

**Removing from patient online access whilst the document is being processed (Docman system)** When processing the document within Docman, on the right-hand side, scroll down to "Online Services" and select "Prevent viewing of this document"



Removing from patient online access whilst the document is being processed (EMIS system)

- 1. Go to the Workflow Manager then choose the Document Management screen
- 2. Select and view the document that you wish to process. If it is evident upon reading the document that it needs to be hidden from patient online access you cannot do this from the screen where you are viewing/reading the document; you will need to switch to the patient record to do this.

View Admin	Admin Actions		Task Actions		Consultation				
Documents - 3 GP2GP - 19 (19)									
🜲 Active 🛛 🛛 MORSE, En	deavou	ur (Inspector)	Born Usual	01-Jan-1970 (52y) GP MILLENER, Nick (Mi	Gender <b>r)</b>	Male	NHS No.	123 456 8	888
🖺 🛛 SHARMA, Michelle (Dr)	*	Created	Patient	Document Type		Sender			Source
Tasks (	),0	11-Feb-2022	MORSE, Endeavour (Inspector)	Safeguarding report received	d	SHARMA,	Michelle (Dr)		AE Development -
Lab Reports 0	),0								
Medicine Management 0	),0								
GP2GP 19,	19								
Document Management 3	3,0 <								
Unmatched		2 n . 1 💽 n	· 🌨 e se 🖾 e	<u>۸</u>		<b>A</b>			
Unmatched		Details E Documen	nt 🝇 Consultation 🔝 Summary						
Inbox	- т.	phound Document /	Awaiting Filing						
Awaiting Coding (2, 0)	1		Rwalding Tilling						
Awaiting Filing (1, 0)	S	HARMA, Michelle (Dr) ent: 11-Feb-2022 16	:52						

- 3. Go to the patient record for that patient and choose the "Care History" tab.
- 4. The document is present but "Provisional" and will not be visible to the patient.
- 5. Right-click on the document, and select Online visibility
- 6. Select **Do not display on the patient's online care record**

Summary	Consultations Me	dication Problems Inve	estigations Care H	listory Dia	ry Docum	ents Referrals					
Edit Delete Sharing	V Lates Desc Trend	t Only riptive Text pse All Data	e Allergies Health Status	Family Im History	munisations	Filters Fits	Print	CR Config	Information Leaf	lets Manage fit notes	
Add/Edit		Vii	ew			Filter	Print	Config	Search	Fit note	
- 19 (19)											
New priorit	y Workflow Items re	ceived - GP2GP									
Smartcard	Alert: Organisation r	nismatch between Smartc	ard role and EMIS	Web role.							
Active 3	MORSE, Endeau	our (Inspector)		E	lorn <b>01-J</b> Jsual GP	an-1970 (52y) MILLENER, Nic	Gen k (Mr)	der Ma	le NHS No.	123 456 8888	3
		Term			Value				Context	^	
-2022	8	[Provisional] Safeguar	ding report receiv	ed	Safeguari Developn (11-Feb-2	ding report receiv nent - Hospital Tr 2022)	ed from / age (WF3	AE A 3)	ttachment	S	Safegu O A
2022		Pain of joint of knee	Delete					P	roblem; First		11-Feb
-2022		Allergy to kiwi fruit	Confidentiality	•	(Grouped	with Food allerg	()	P	roblem; First		O D
-2022		HAD scale: depress	Online visibility	y 🕨	Disp	lay on the patient	s online c	are record			Value
2022		Telephone consulta	Copy to Local	Record	Don	ot display on the	patient's o	online care	record		

7. The entry should now have a computer with a red cross through it icon at the right-hand side to show that it is not visible online:

Date		Term	Value	Context	Â
11-Feb-2022	U	(Provisional) Safeguarding report	Safeguarding report from AE Development - Hospital Triage (WF3) (11-Feb-2022)	Attachment	
11-Feb-2022	ili i	Safeguarding report received	Safeguarding report received from AE	Attachment	

8. You can now go back to the document management screen and process the document. When it is processed, it will not be visible to the patient.

#### Removing a document from patient online access in retrospect:

If a document is already saved within a patient's record and is subsequently identified as requiring hiding from online access, this is the process for removing from online visibility:

- 1. Select the Care History Tab
- 2. Select the document you do not wish to be displayed online and Right-Click
- 3. Select Online visibility
- 4. Select Do not display on the patient's online care record

(m) 🖬 🔝 🖉 🛷 📰 🗉 🖛	8 = " = <b>"</b> • 🗠 (" <u>11</u> 🗀 a				EMIS We	b Health Care System
Summary Consultations Medi	cation Problems Investigations Care Histor	/ Diary Documer	nts Referrals			
Add Sharing Collaps	dive Text All Data View	nily Immunisations	Filters Filter	Print Config	Information Leaflets	Manage fit notes
Test Requests - 3 Referrals - 4	Documents - 2 <u>GP2GP</u> - 19 (19) <u>Medici</u> Is)	n <u>e Management</u> - 4	(2) <u>Registra</u> Born :	<u>tion</u> - 162 (1) 17-Jun-1966 (5	<u>Lab Reports</u> - 1 <u>Ta</u> 5 <b>5)</b> Gender Fe	asks - 11 (9) male NHS No.
Date	Term	Value				
Date	Term Ex-smoker	Value				
Date 11-Feb-2022 11-Feb-2022	Term Ex-smoker C/O: a rash	Value				
Date 11-Feb-2022 11-Feb-2022 11-Feb-2022 11-Feb-2022	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar	Value				
Date 11-Feb-2022 11-Feb-2022 11-Feb-2022 11-Feb-2022 0	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitted	Value		ference Report		
Date         Ili-Feb-2022           11-Feb-2022         Ili-Feb-2022           11-Feb-2022         Ili           11-Feb-2022         Ili	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitter Safeguarding report	Value Edit Delete		ference Report feguarding Hub (N	IASH) Referral Form	
Date         Image: Constraint of the constraint of	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitted Safeguarding report Cardiological referral	Value Edit Delete Confidentialit		<b>ference Report</b> feguarding Hub (M Referral Form 20;	IASH) Referral Form 210603	
Date         Il-Feb-2022           11-Feb-2022         Il-Feb-2022           11-Feb-2022         II           03-Jun-2021         II           24-May-2021         II	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitted Safeguarding report Cardiological referral Asthma monitoring call first letter	Value Edit Delete Confidentialit	y P	ference Report feguarding Hub (M Referral Form 202	IASH) Referral Form 210603	
Date         Il-Feb-2022           11-Feb-2022         Il-Feb-2022           11-Feb-2022         II           I1-Feb-2022         II           II-Feb-2022         III           III-Feb-2022         III           III-Feb-2022         III           III-Feb-2022         III           III-Feb-2022         III           III-Feb-2022         III           III-Feb-2022         III-Feb-2022           III-Feb-2022         III-Feb-2022           III-Feb-2022         III-Feb-2022           III-Feb-2022         III-Feb-2022 <t< td=""><td>Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitted Safeguarding report Cardiological referral Asthma monitoring call first letter Did not attend - no reason</td><td>Value Edit Delete Confidentialit</td><td>y F</td><td>ference Report feguarding Hub (N Referral Form 202 Display on th</td><td>IASH) Referral Form 210603 ne patient's online care r</td><td>ecord</td></t<>	Term Ex-smoker C/O: a rash Adverse reaction to Prevenar Child protection conference report submitted Safeguarding report Cardiological referral Asthma monitoring call first letter Did not attend - no reason	Value Edit Delete Confidentialit	y F	ference Report feguarding Hub (N Referral Form 202 Display on th	IASH) Referral Form 210603 ne patient's online care r	ecord

# SystmOne

When an entry has been marked as not for online access, it will be represented by a small icon of a computer with a red cross on it:



## Removing from patient online access whilst the document is being processed:

1. Within the "documents inbox" click on the document that you wish to process. This will take you to the "scanned document update screen":

Scanned Document Update           Qt         Ok and Anolyar         Sanol         Sanol Jask         Addite of North	er Det Perte Satraja
R ♥ → (2) ♥ Ø	Scanned in by PINNEGAR, Rachel (Miss) R Pinnegar 08 Feb 2022 09:14 Report
under-Houging Chek Lefter Ber Type Chek Lefter Bender Ball War Centre cujeter Manufer Metical Centre	Pad Therapy Central Sent: 07 Feb 2002 09:53
No flag set	Te: "moredonmedicalcentre@nths.net"
stratus an Ada Biospensate: Offense Couples	e us bioloming Fasses are antibular for formation. Antibular barden formation Antibular barden formation Balandon formang (haved) Direct formang (haved) Direct formang (haved) antibular (haved) www.sandon.grou.k
	The view opposed in the installant period and any set occursity reflect these of the lattice to be and the set of the lattice to be and the lattice to be
	Special Specia

- 2. If it is evident upon reading the document that it needs to be hidden from patient online access you cannot do this from the "scanned document update screen" where you are viewing/reading the document; you will need to switch to the patient record to do this.
- 3. To change to the patient record screen, you will need to minimise the "scanned document update screen," and click on the name/address of the patient in the top right-hand corner of the "documents inbox," to bring up the patient record.
- 4. Please note, if you have more than one screen, you will be able to have the "documents inbox" on one screen and the "scanned document update screen" on the other. In this case, you will be able to click on the name/address in the right-hand corner of the "documents inbox" screen directly to bring up the patient record, without having to minimise the "scanned document update screen."
- 5. Once in the patient record, you will need to find the document entry within the new journal. It will have the words "document workflow not completed" to the right of it and it will not yet be visible in the patient record.

negar	IRANIAL I HTTE ONLY NEETED (IMBA) (USABING OUPPOIL CEASE NOIS)	KI U
eb 2022 Inegar	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role) Paediatrician Letter to Abbey Meads Medical Group (document workflow not completed)	0
eb 2022 Inegar	Surgery: PINNEGAR, Rachel (Miss) (Systems Support Access Role) , Entered By: PRITCHARD, Charlotte (Mrs) Seen in accident and emergency department (9N19.)	0

6. Right click on the date/time of the New Journal entry and choose "do not show in the online record."



7. The entry should now have a world with a red cross through it at the right-hand side to show that it is not visible online:

inegar	Hospital, PhoteConk, Rachel (Miss) (Systems Support Access Role)	<b>M</b> 0
ib 2022 inegar	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	803
ib 2022	Surgery: PINNEGAR. Rachel (Miss) (Systems Support Access Role). Entered By: PRITCHARD. Charlotte (Mrs)	500

8. You can now go back to the "scanned document update screen" and finish processing the document. When you complete this, it will not be visible to the patient.

## Removing in retrospect:

If a document is already saved within a patient's record and is subsequently identified as requiring hiding from online access, this is the process for removing from online visibility:

- 1. Find the entry in the new journal
- 2. Right-click on the date/time
- 3. Select "do not show in the online record:"



4. Please note that a document *cannot* be made "not-visible" to a patient online via either the "communications and letters" section nor the "record attachments" section. It can only be done through the above steps 1-3 in the new journal.

#### **Surgery Processes**

Each surgery organises the processing of documents in a slightly different way. It is recommended that each surgery reviews how they process their documents in light of the above, and before the launch of the accelerating patient online access.

Author: Michelle Sharma, Named GP for Safeguarding, Swindon Locality michelle.sharma@nhs.net