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

Important

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**

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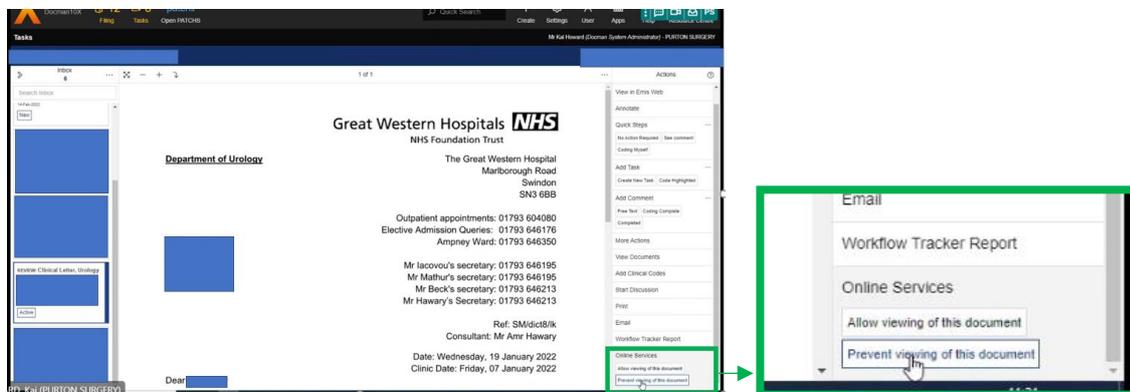
EMIS

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"


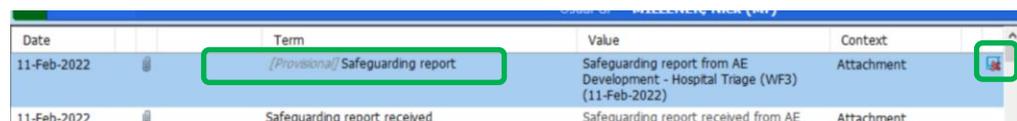**Removing from patient online access whilst the document is being processed (EMIS system)**

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.
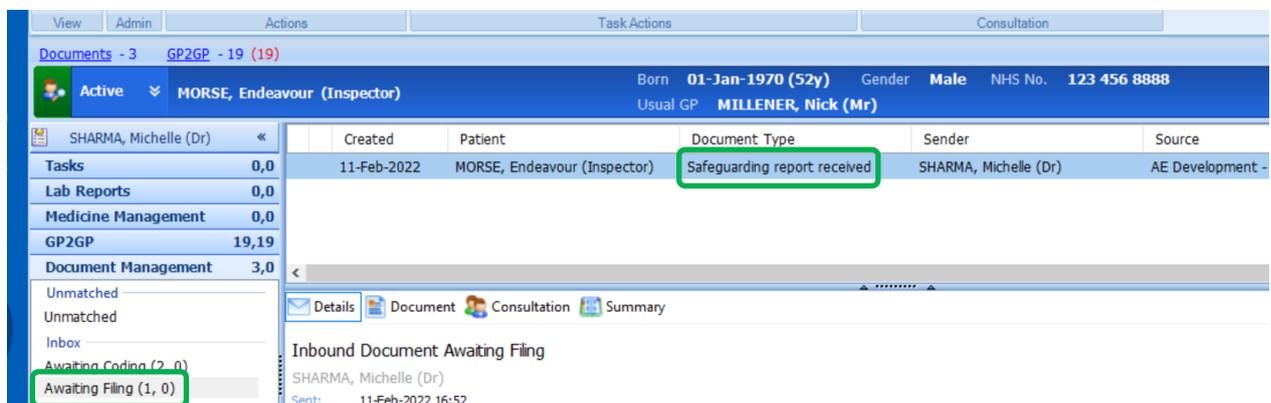
3. **Go to the patient record** for that patient and choose the "**Care History**" tab.
4. The document is present but "**Provisional**" and will **not be visible to the patient**.
5. **Right-click** on the document, and select **Online visibility**
6. Select **Do not display on the patient's online care record**
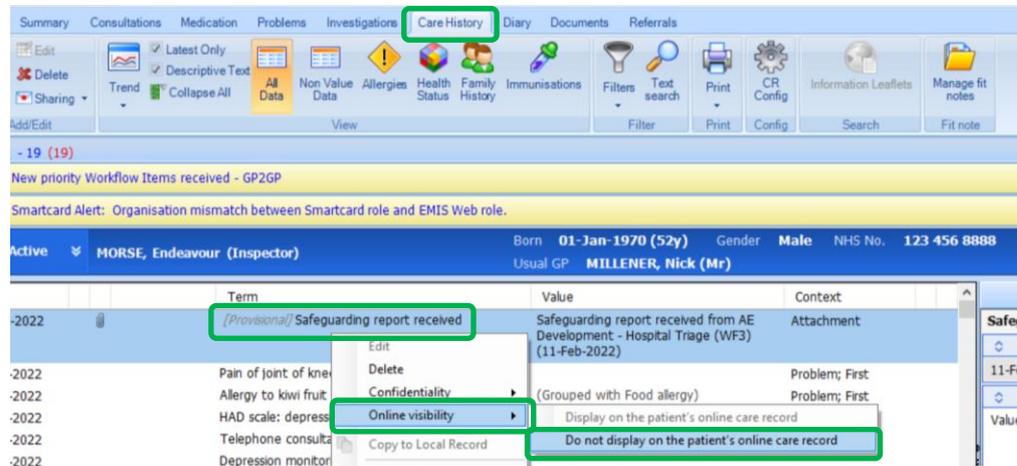
7. The entry should now have a computer with a red cross through it icon at the right-hand side to show that it is not visible online:


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**
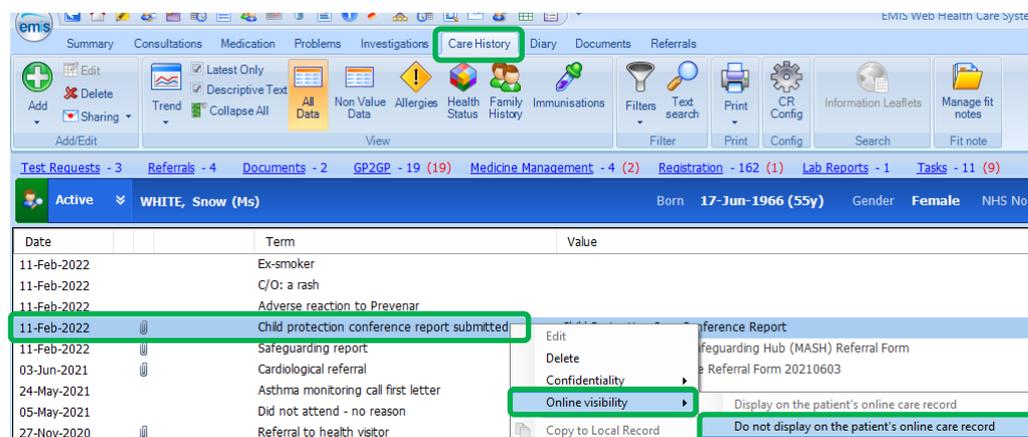
SystmOne

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":
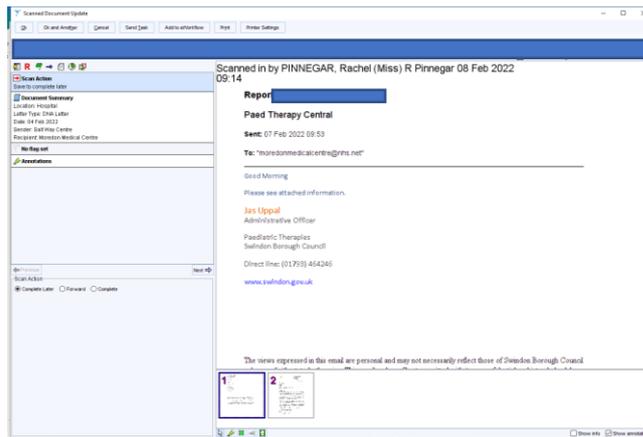
2. If it is evident upon reading the document that it needs to be hidden from patient online access you cannot do this from the "scanned document update screen" where you are viewing/reading the document; **you will need to switch to the patient record to do this**.

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.

6. Right click on the date/time of the New Journal entry and choose "do not show in the online record."
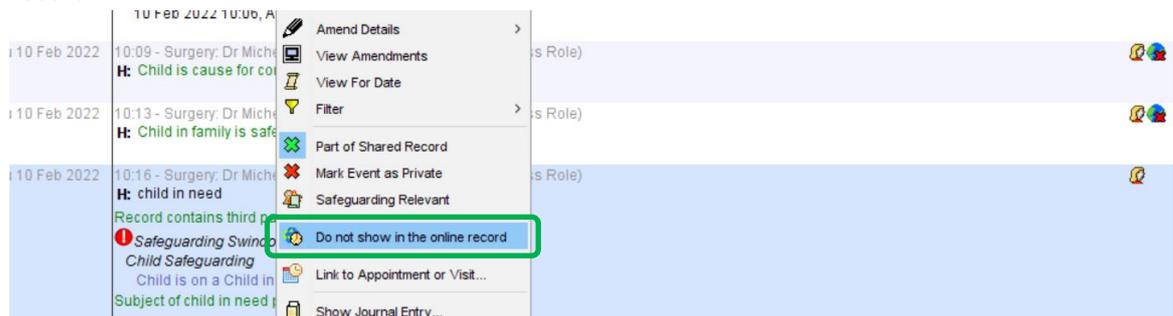
7. The entry should now have a world with a red cross through it at the right-hand side to show that it is not visible online:


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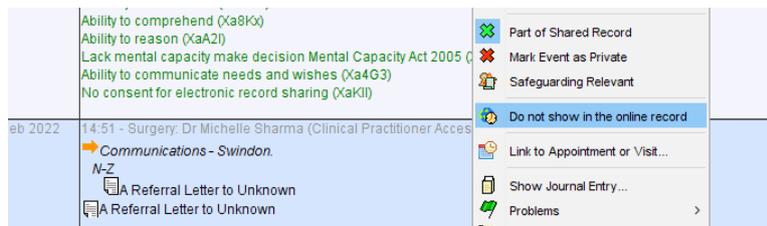
4. Please note that a document *cannot* be made "not-visible" to a patient online via either the "communications and letters" section nor the "record attachments" section. It can only be done through the above steps 1-3 in the new journal.

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.

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