

GP2GP/Docman Exports Guidance – Files Remaining in Record

Background

It has been identified that, during some patient exports, Docman may fail to delete documents from the patient record as expected. This issue does not affect all exports but has been observed to occur intermittently for certain cases e.g. larger documents over 20Mb.

At this point practices are currently attempting to re-export the patient to try to remove the documents from Docman. The guidelines below detail why we are asking practices not to do this and what the expected actions are in this situation.

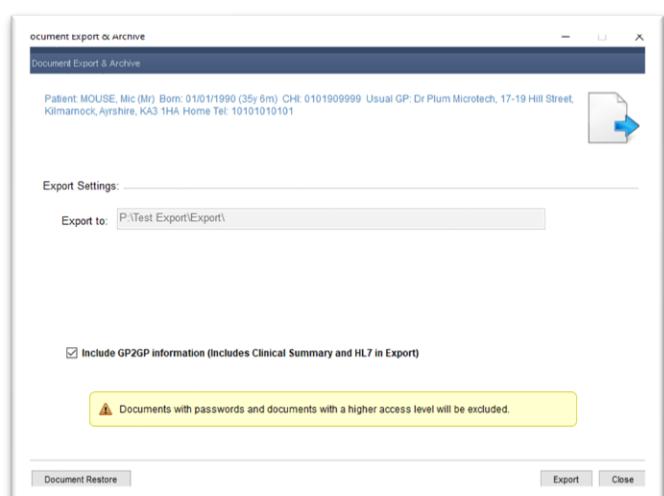
Please be aware that not following the guidance outlined below will lead to the following outcomes for practices.

- **The sending record will be flagged by PSD and will not be delivered to practice causing delays in receipt of the patient record.**
- **The full record will need to be restored into Docman to rebuild the record and resolve any issues caused by the multiple exports, which will further delay the receipt of the patient record.**
- **No HL7 clinical information will be transferred with this patient, meaning that the receiving practice will have to manually summarise the patient record and enter the clinical history into the clinical system.**

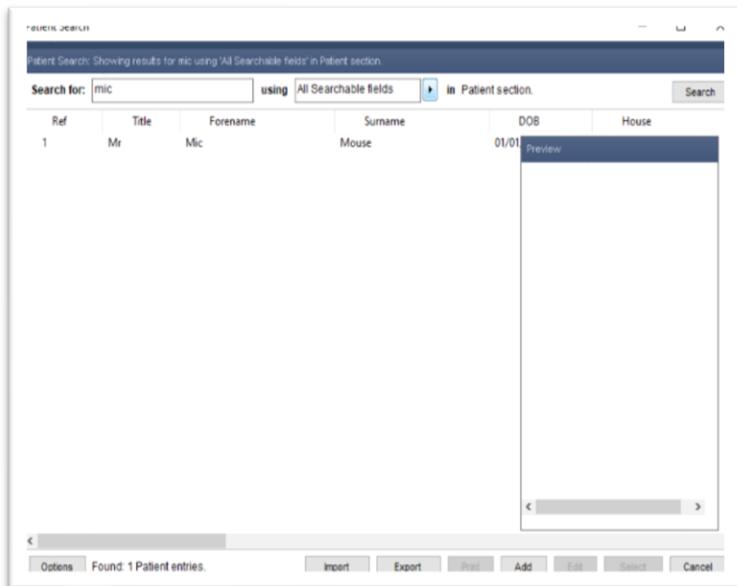
Perform export

The practice should follow their standard process for starting patient export.

This would include selecting the patient in Docman on the patient search window and clicking on Export. The following example window should appear allowing for a GP2GP export to be done for the patient. This should be done, and the practice should click on Export.



Successful Export



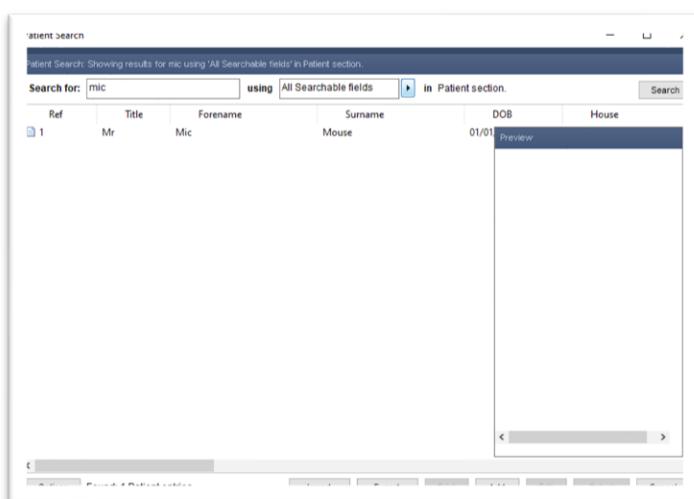
Upon successful completion of the export the user should refresh the record to ensure all documents have been successfully sent and archived. This can be done from within the patient viewing window by either:

1. Pressing F5 to refresh
- OR
2. Clicking 'Options' at the bottom left of the window, then click 'Refresh'

As can be seen in this screenshot after the refresh the (Icon) no longer shows beside the patient record on the far left. This means that there are no documents in the patient record and no further actions are required.

Please note that if any subsequent documents are received by the practice and uploaded for the patient after a successful GP2GP export, the user should **wait until the following day** before attempting to export these documents.

Documents Remaining after export



Upon completion of the export and refreshing the patient record (as detailed above) if the icon still shows beside the patient record, this means that Docman failed to delete all documents and there have been documents left in the patient record.

If this occurs **no further exports should be attempted** and the guidance outlined below should be followed.

Logging call

The practice must not proceed with a second export for the patient at this stage to prevent potential data duplication and integrity issues. Attempting to do this without resolving the underlying issue may compromise patient records or disrupt downstream workflows as detailed at the start of this document.

Therefore, the process should be halted immediately, and a support ticket must be raised with Microtech using the standard escalation procedure to ensure proper investigation and resolution.

Microtech also recommend that any issue is logged as soon as possible as there is a retention timeframe on data required to investigate and resolve this issue.

When logging the call with Microtech we recommend providing the following information:

- Patient Clinical reference number
- Date / Time of Export (if known)

At this point when the ticket has been raised with Microtech, Microtech will investigate and resolve any issues with the export. Microtech will perform the following piece of work:

- Microtech will check and confirm if a full patient export has taken place
- Microtech will check and confirm the documents remaining in the patient record are included in the original export
- If any documents are confirmed as not being included in the original export these will be exported to the receiving practice by Microtech
- Microtech will archive any remaining documents in the record
- If Microtech are unable to archive the records via the automated process, the Practice/HB will be contacted for permission for Microtech to manually delete the documents. Before requesting this permission, Microtech will check and confirm the following:
 - All the documents have already been successfully exported
 - There is a restorable copy of the documents from within the archive folder
- Once Microtech have permission from the HB or practice the documents would then be deleted from Docman.
- If any subsequent documents are received by the practice and uploaded for the patient while the ticket is still open, the user should contact Microtech to advise them that these additional documents should be exported before closing the incident.
- All issues being resolved the ticket will now be closed.

Failed Export

If the GP2GP export fails then the current process to re-run the export and untick the “include GP2GP information” box remains unchanged.