Transferring Correspondence for a Deducted Patient – Good Practice
**Background**

Various types of correspondence can arrive at a GP Practice after a patient has left. This can include test results, hospital letters, final reports and post mortem reports. As good practice, we noted in the July 2012 edition of the Good Practice newsletter that instead of sending this correspondence through the mail bags to Practitioner Services Regional Offices, GP Practices could send this correspondence through the current DocMan Transfer – export process. This would remove the paper correspondence from the paper record transfer system and streamline current processes.

Transferring the correspondence electronically for a deducted patient has multiple benefits:

- For the patient – action taken quickly
- For the GP Practice – no need to delete from the DocMan workflow, retrieve the paper copy and send via the Practitioner Services mail bag
- For the new GP Practice – no delay in receiving the outstanding correspondence
- Overall – timely increase in completeness and quality of the record

Please note that the medical defence unions recommend that any correspondence for a deducted patient is reviewed prior to sending. However, practices may also wish to ensure that such correspondence is reviewed upon receipt to ensure patient safety.

**Export Process**

GP Practices should follow the normal export process in DocMan.

As the paper medical records and the DocMan records will have already been sent, GP Practices should select - ‘Yes – fully scanned’ to the export message prompt – ‘Is the patient record fully scanned into DocMan?’

**Import Process**

At the receiving GP Practice, you should be aware that you may receive correspondence for import for a patient for whom records have already been imported. GP Practices should not assume that it is a duplicate package.

As part of the normal import process, there will be the usual import message prompt advising – ‘Import complete. Imported xx documents. Please note, the sender indicated that this is the complete document record’. The number of documents likely in these instances will be 1 document.

When carrying out the import process, take a note of the patient details where the imported record states only 1 document imported.

Once import complete, you can then search for the patient documents by filed date order – see guidance below:

- Select Patient from the pop up menu.

- In the Search For date box, enter the date the document was filed.

- In the Using field, using the drop down arrow pick ‘Filed Date’ from the following selection:
- Click Search and a list of all documents will be displayed that have been filed on the date selected.

- You can sort your selection into patient order by clicking on the word ‘Patient’ on the top of the Patient column.

- Double-click on the document in the list that you wish to open and this will display the document within the patient record.

- When viewing the document, the user can press F6 to view the audit trail of the document. This will list the exact date and time of when the document was added into DocMan and the patient’s record.