

# DocMgr - Removing a scanned document from DocMgr

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**Author:** {'link':

'https://fmcnadev.service-now.com/api/now/table/sys\_user/31a85ef41bb989501d67db1dcd4bcb92',

'value': '31a85ef41bb989501d67db1dcd4bcb92'}

**Category:** {'link':

'https://fmcnadev.service-now.com/api/now/table/kb\_category/46a0da8b87ebf95465678a8acebb35f9',

'value': '46a0da8b87ebf95465678a8acebb35f9'}

## Purpose:

Follow this procedure when a user reports scanned document needs to be removed in DocMgr. This documentation is for DocMgr ONLY and not for Document Imaging (DI).

Required Information to be documented in each Incident:

Contact Name Contact Number Clinic / Facility Number Document Handle (DH) number  
(highlighted) Document Date Detailed Description of the issue Screenshot of the document (Optional)

Note: Documents cannot be transferred between patients. Specific pages cannot be removed, only entire document can be removed

## Troubleshooting Process

1.

Confirm with user that the issue is related to removal of documents from a patient's chart in DocMgr and not from Document Imaging (DI).

2.

Please document required information and troubleshooting details in the incident.

3.

Please attach any referenced knowledge articles to the incident.

4.

Please inform users that the process for removing scanned documents from DocMgr has changed. A self-service functionality within DocMgr will enable users to remove documents themselves, without having a need for a support ticket.

5.

Please share the attached Job Aid with the user and point them to the OnBase for Admissions Training site for reference -

If needed, assist the user in removing the document by following the attached job aid.

6.

If a document was marked as bad accidentally and needs to be recovered, then make sure to capture the below required information before sending the ticket over to OnBase L2,

MRN Name of the caller who marked a document as bad Date of execution of task/Initial doc type (optional)

7.

Follow the escalation process.

Incident Classification Requirements

Category

Software & Applications

Subcategory

Clinical Applications

Service

DocMgr

Resolution Process

Please review/update Classification and provide customer with the Incident number for their reference prior to resolving.

Incident Resolution Categorization

Resolution Code

Solved Remotely (Permanently)

Resolution Category

Software & Applications

Resolution Subcategory

Clinical Applications

Resolution Service

DocMgr

Escalation Process

Please review/update Classification and provide customer with the Incident number for their reference prior to escalating

Escalation Group

DTI-ADEX-DigitalPortals-SOP OnBase - L2

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