

Quick Reference Guide – Viewing Documents

There are two methods of accessing and viewing documents, from a panel on the person summary dashboard or the document view.

Document Panel

Documents can also be accessed via a document panel on the person summary dashboards



The panel will show the most recent 10 documents, you can expand the panel to see all documents.



The document selected will also be highlighted in document tree.

Document View 💿 🍳 🖒 Showing All Mark All As Read	Post Event Message		
Group By Category Sort By Date	Subject-	22-Feb-	
Dashboards			
Dashboards BETA	Priority:	Urgent (2hr)	
Event Summary	Call #: 42087	Received: 04-Aug-2022	
Laboratory Results Send Feedback to Connecting Care	Patients Name	Holmes	
👝 Data Quality Feedback	Gender:	Female	
 GP Record (11 / 11) Integrated Urgent Care (2 / 3) 	Case Type:	Clinician Advice	
V Post Event Message (2 / 3)	Adv Start:	06:58	
04-Aug-2022 Post Event Mess 25-Sep-2021 Post Event Mes	Adv End:	07:04	
06-Aug-2020 Post Event Mes			
Radiology (1 / 1)			
	NHS Number:		
	Advice Summa	Advice Summary:	
		spoke to pt on abx for a few days for ?uti panicking as worried that she has soreness and a ?lump in vagina says imp 2wk ago, and not pregnant: has done pregnancy test 2d ago no abdo pains, no fever, no pv discharge says ltchy aroud vulva seems likely thrush, but i guess possible batholins cyst preffects feels panicky re naving pv exam, and prefers to take a pragmatic approach to treat as ?thrush and wil I tried to do script but adastra would not work for this pt ?worth trial clotrimazole cream/ pessary- she may contact ogp for script (apologies that I could not issue this)	

To select a document click within the panel

The document tree

It is now possible to view documents from University Hospitals Bristol and Weston NHS Foundation Trust (UHBW)- Bristol and Weston General Hospitals¹, North Bristol Trust², Avon and Wiltshire Mental Health Partnership Trust³, Severnside Integrated Urgent Care Service⁴ and Care Homes⁵ in the Connecting Care portal.

• On the patient summary screen on the left hand side, underneath the 'Person Summary' you will see the **document tree**



- At the top level you will see the **Service Name** e.g. Rheumatology
- To expand this section click on the grey arrow

¹ Currently only Discharge Summaries are available from Weston General Hospital

² NBT documents are only currently available from some services - Rheumatology, Neuropsychology, Neuropsychiatry, Neurophysiology, Burns - Occupational Therapy, Physiotherapy, Neurosurgery, Antenatal, Fertility, *Gynaecology and Obstetrics*, Bristol Speech and Language Therapy, Dietetics, Pain Clinic/Pain Management, Breast Screening and Symptomatic services, Neurology, Stroke, NBT ReSPECT, ED Discharge Summaries and ICE Discharge Summaries

³ Crisis, Relapse and Contingency plans, Peri-Natal care plans and discharge summaries are available from AWP

⁴ Severnside Integrated Urgent Care out of hours discharge summary (Post Event Messages) is available from Integrated Urgent Care service

⁵ Red Bag Documentation Pack/ Hospital Pack will be available for Care Homes using Person Centred Software



- Below the Service Name Level you will then see the document types/ Category e.g. Clinic Letter, Discharge Summary
- You can then further expand the document type to see the list of documents below
- Please note In the event that you cannot find a Crisis, Relapse and Contingency Plan and are expecting to see one, it may be of value to contact the Care Co-ordinator. They may be able to access this information. You can find details of the Care Coordinator on the Care Network panel in the portal.
- You can also view NBT Major Trauma Centre **Rehabilitation Prescription** in the Document View, the Service Name will display as 'Patients Know Best'
- The Red Bag Documentation Pack/ Hospital Pack will display under Care Home and Third party documents.
- You can also view Severnside Integrated Urgent Care Service **out of hours discharge summary** (sometimes referred to as Post Event Message) in the Document View, the Service Name will display as 'Integrated Urgent Care'. These documents summarise the advice given in relation to 111 call, and also any visits made by this service (formally known as Out of Hours).
- You will notice that the document line will appear in **bold** when it is 'unread'

- When you hover over the document line you will see further information associated with this document
 - **Request Date** = Date document was created
 - **Category** = Document Type
 - Service = The service the document has come from
 - Author = The clinician who published the document
 - **Site** = Organisation the document has come from



Filtering & Grouping the Document Tree

- You can filter the documents by first selecting the ¹/₁ icon and selecting one of the following timeframes
 - o Last 72 Hours
 - o Last 14 Days
 - o Last 3 Months
 - Last... (1-12, Day(s), Month(s) or Year(s))
 - Specific Range



- Select one of these options and click **Apply.** The default filter is to show **All** documents.
- If you select the **Specific Range** options you can enter your own timeframe as below



- The default grouping is by Service, you can also choose to group by
 - o Category
 - o Date
 - Service
 - \circ Author
 - Accession Number (linked to Radiology Reports)



• For example if you group by **Date** it will appear as below



• To check for new documents click on the refresh button

Searching the Document Tree

• To search for a word or term in the **Category**, **Service** or **Author** fields click on the **Search** icon



• You can choose to search by 'Read' and Unread' documents.

Please note that you cannot search for terms within the documents.

• To view the document select the document line e.g. 10-May-2019 NBT Clinic Letter, the document will then appear in the window to the right

For more information & support contact your local IT Helpdesk