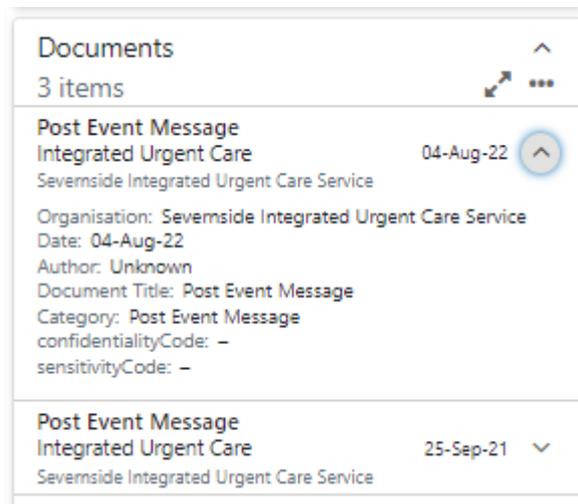
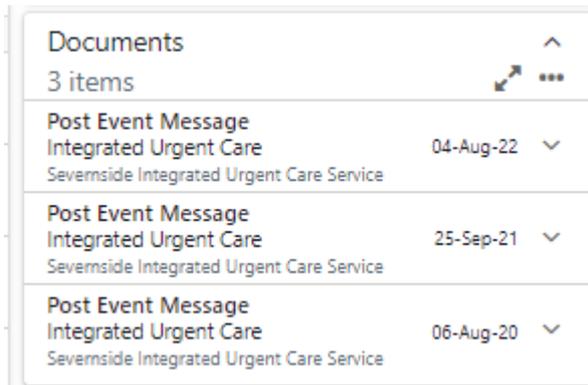


## Quick Reference Guide – Viewing Documents

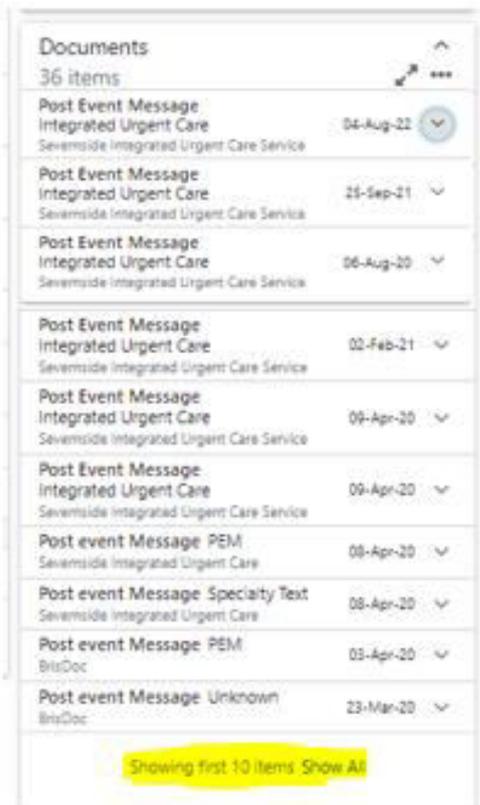
There are two methods of accessing and viewing documents, from a panel on the person summary dashboard or the document view.

### Document Panel

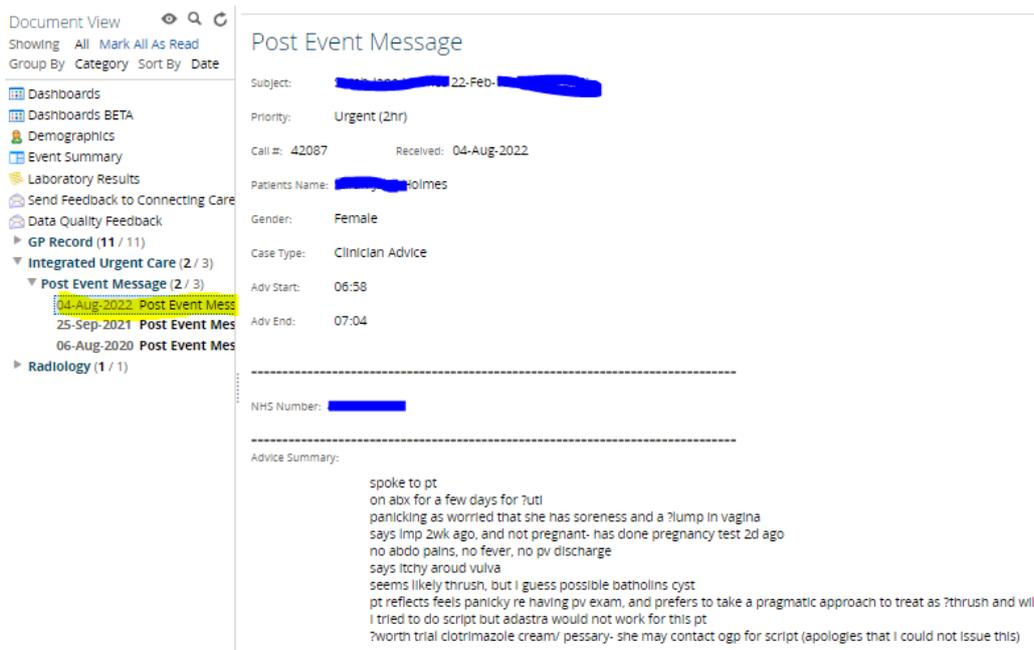
Documents can also be accessed via a document panel on the person summary dashboards



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.

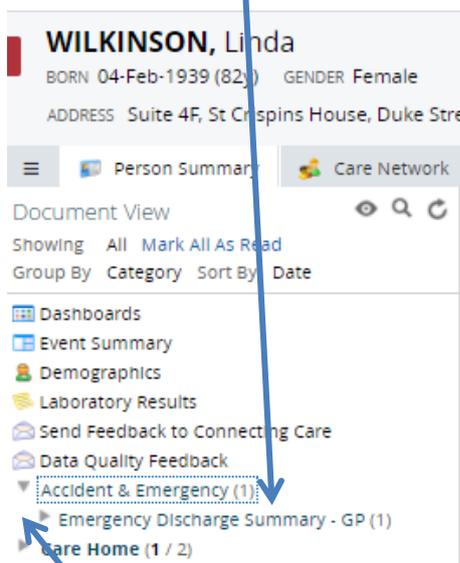


To select a document click within the panel

## The document tree

It is now possible to view documents from University Hospitals Bristol and Weston NHS Foundation Trust (UHBW)- Bristol and Weston General Hospitals<sup>1</sup>, North Bristol Trust<sup>2</sup>, Avon and Wiltshire Mental Health Partnership Trust<sup>3</sup>, Severnside Integrated Urgent Care Service<sup>4</sup> and Care Homes<sup>5</sup> 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

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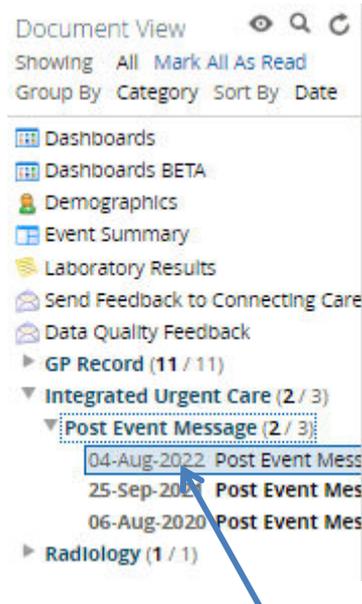
<sup>1</sup> Currently only Discharge Summaries are available from Weston General Hospital

<sup>2</sup> 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

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

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

<sup>5</sup> 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 Co-ordinator 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'



- 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

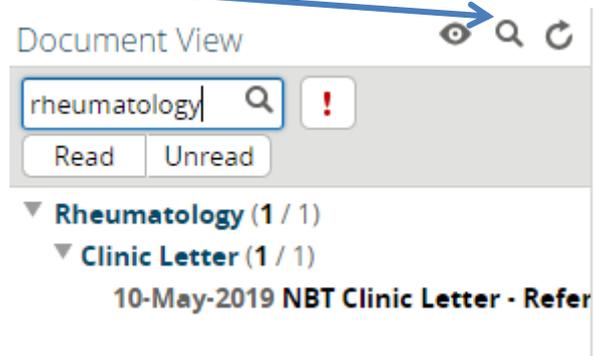
- The default grouping is by **Service**, you can also choose to group by –
  - Category
  - Date
  - Service
  - Author
  - Accession Number (linked to Radiology Reports)
  - Organisation

- 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**