





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

Documents			^
3 items			 
OOH note	Integrated Urge...	29-Aug-25	▼
OOH note	Integrated Urgent...	14-Jul-25	▼
OOH note	Integrated Urgent...	14-Jul-25	▼

Documents			^
3 items			 
OOH note	Integrated Urgent Care	29-Aug-25	^
Date: 29-Aug-25 Author: Unknown Document Title: NHS 111 CLEO PEM Category: OOH note			
OOH note	Integrated Urgent Care	14-Jul-25	^
Date: 14-Jul-25 Author: Unknown Document Title: NHS 111 CLEO PEM Category: OOH note			
OOH note	Integrated Urgent Care	14-Jul-25	^
Date: 14-Jul-25 Author: Unknown Document Title: NHS 111 CLEO PEM Category: OOH note			

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

Documents
76 items

OOH note Integrated Urg... Today, 03:50

OOH note Integrated Urgen... Sun 15:48

OOH note Integrated Urgen... Sun 06:46

OOH note Integrated Urgent ... Fri 04:07

Emergency Discharge Su... 17-Sep-25

Discharge Summary Geri... 13-Sep-25

Clinical Correspondence... 12-Sep-25

Clinical Correspondence... 12-Sep-25

Clinical Correspondence... 12-Sep-25

OOH note Integrated Urgen... 11-Sep-25

Showing first 10 items Show All

Documents
76 items

OOH note Integrated Urg... Today, 03:50

OOH note Integrated Urgen... Sun 15:48

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OOH note Integrated Urgen... 11-Sep-25

Showing first 10 items Show All

The document selected will also be highlighted in the document tree.

Person Summary Care Network Timeline GP Records Medications Consent Status Update CICB Tracking Form Latest CICB Tracking Form CICB Enrolment

Document View

Showing: All Mark All As Read
Group By: Category Sort By: Date

GP Record (11 / 11)
Integrated Urgent Care (38 / 40)
Clinical Notes (21 / 22)
25-Sep-2025 NHS 111 CLEO PEM Unknown
21-Sep-2025 NHS 111 CLEO PEM Unknown
21-Sep-2025 NHS 111 CLEO PEM Unknown
19-Sep-2025 NHS 111 CLEO PEM Unknown
11-Sep-2025 NHS 111 CLEO PEM Unknown
10-Sep-2025 NHS 111 CLEO PEM Unknown
05-Sep-2025 NHS 111 CLEO PEM Unknown
03-Sep-2025 NHS 111 CLEO PEM Unknown
30-Aug-2025 NHS 111 CLEO PEM Unknown
29-Aug-2025 NHS 111 CLEO PEM Unknown
29-Aug-2025 NHS 111 CLEO PEM Unknown
23-Aug-2025 NHS 111 CLEO PEM Unknown
19-Aug-2025 NHS 111 CLEO PEM Unknown
17-Aug-2025 NHS 111 CLEO PEM Unknown
16-Aug-2025 NHS 111 CLEO PEM Unknown
13-Aug-2025 NHS 111 CLEO PEM Unknown
13-Aug-2025 NHS 111 CLEO PEM Unknown
09-Aug-2025 NHS 111 CLEO PEM Unknown
06-Aug-2025 NHS 111 CLEO PEM Unknown
05-Aug-2025 NHS 111 CLEO PEM Unknown
Post Event Message (17 / 18)
03-Aug-2025 Post Event Message Unknown
31-Jul-2025 Post Event Message Unknown
26-Jul-2025 Post Event Message Unknown
15-Jun-2025 Post Event Message Unknown
17-May-2025 Post Event Message Unknown
20-Mar-2025 Post Event Message Unknown
02-Nov-2024 Post Event Message Unknown

1 of 1

14-Jul-2025 16:20 - Olubunmi Oderinde | Advice (Not Urgent)

History Patient details confirmed: YES. Spoken to: Patient Patient presenting with: TEST3 TEST6 Red
Flags: TEST7

Examination
Diagnosis TEST2
Treatment TEST7 Safety netting: TEST

Medication Prescription:

Completed As: Advice with an Urgency of Routine Final Outcome of Severnside Home Visit

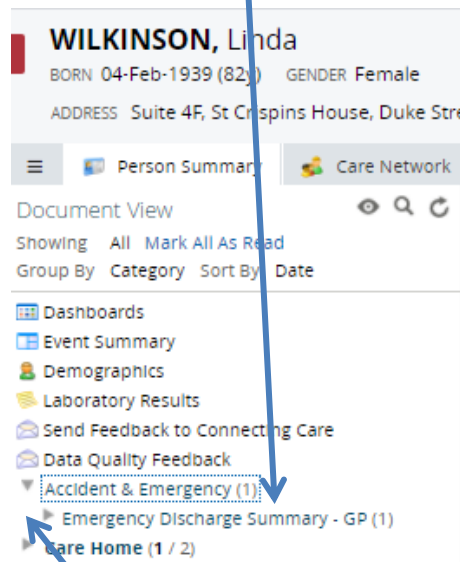
Notify Surgery of: No Follow UpAdditional Comments:

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

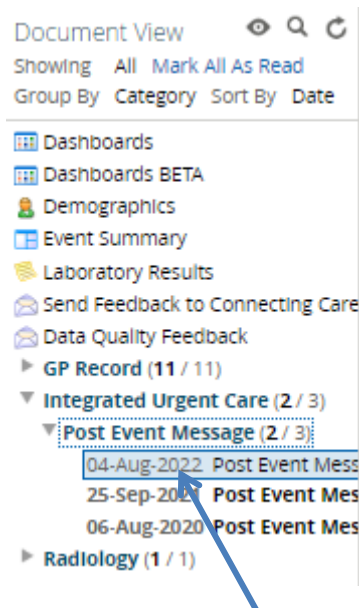
¹ Currently only Discharge Summaries are available from Weston General Hospital

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

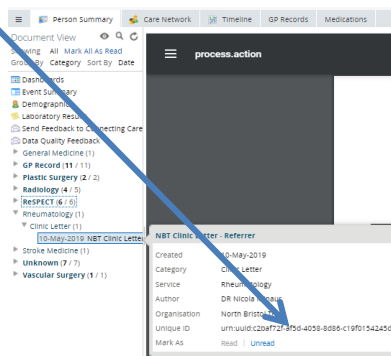
⁴ Severnside Integrated Urgent Care out of hours documents is available from the Integrated Urgent Care service

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




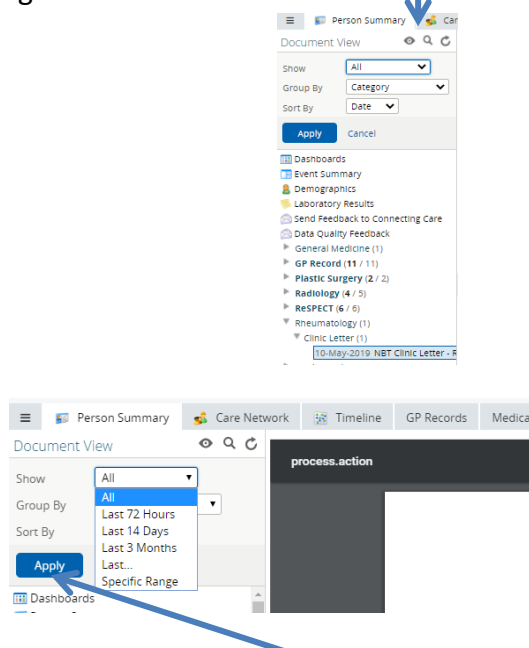
- Below the Service Name Level you will then see the document types/ Category e.g. **Clinic Letter, Discharge Summary**
- You can then further expand the document type to see the list of documents below
- **Please note** In the event that you cannot find a **Crisis, Relapse and Contingency Plan** and 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 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'

- 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

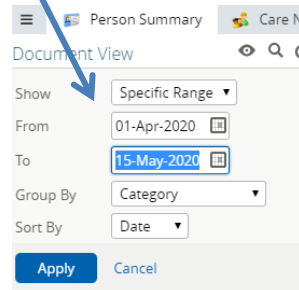


Filtering & Grouping the Document Tree

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

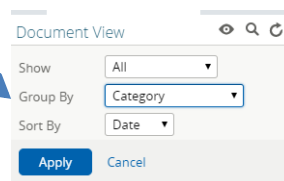


- Select one of these options and click **Apply**. The default filter is to show **All** documents.
- If you select the **Specific Range** options you can enter your own timeframe as below



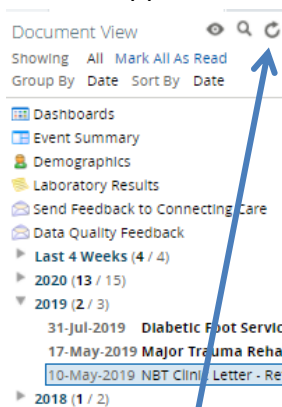
The screenshot shows the 'Document View' filter panel. The 'Show' dropdown is set to 'Specific Range'. The 'From' date is '01-Apr-2020' and the 'To' date is '15-May-2020'. The 'Group By' dropdown is set to 'Category' and the 'Sort By' dropdown is set to 'Date'. There are 'Apply' and 'Cancel' buttons at the bottom.

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



The screenshot shows the 'Document View' filter panel. The 'Show' dropdown is set to 'All'. The 'Group By' dropdown is set to 'Category'. The 'Sort By' dropdown is set to 'Date'. There are 'Apply' and 'Cancel' buttons at the bottom.

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

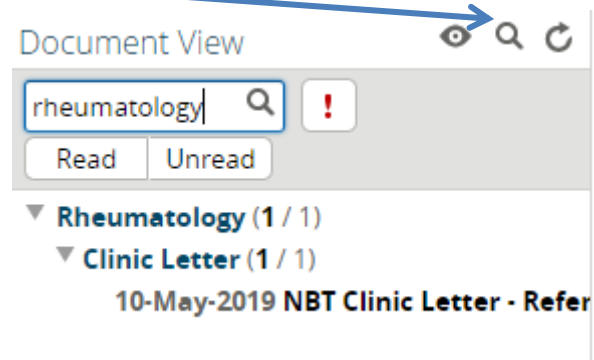


The screenshot shows the 'Document View' results page. The 'Showing' dropdown is set to 'All' and the 'Mark All As Read' link is visible. The 'Group By' dropdown is set to 'Date' and the 'Sort By' dropdown is set to 'Date'. The results are grouped by year: 'Last 4 Weeks (4 / 4)', '2020 (13 / 15)', '2019 (2 / 3)', and '2018 (1 / 2)'. A blue arrow points to the 'refresh' button in the top right corner.

- 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