



Better informed means better care

Dorset Care Record brings all your health details together so medical and social care staff **can give you the best possible care**

How to manage a patient's Shared Files in the DCR



For more information please visit:
news.dorsetcouncil.gov.uk/dcr-staff-area

How to manage a patient's Shared Files in the DCR

This guide will show you how to find and view a patient's **Shared File** in the **DCR**, as well as how to share a new file with a patient, and how to edit or delete an existing **Shared File**.

You should receive an email notification when your patient uploads a new **Shared File**, edits or deletes an existing **Shared File** if

- ✓ you are in a role that can receive notifications for shared files,
- ✓ your notifications are set to administrator defaults under Notifications - My Subscriptions, and
- ✓ you are added to the patient's Circle of Care.

User Guide Content

1. The Shared File email notification you receive when a file is shared/edited/deleted by the patient, provided you satisfy the 3 criteria.
2. The 3 criteria:
 - 2.1 You are in a role that can receive notifications for shared files. How to check which roles can receive email notifications.
 - 2.2 Your subscriptions are set to administrator defaults. How to check the set-up of your notifications.
 - 2.3 You are added to the patient's Care Team in the Circle of Care. How to add yourself to the patient's Care Team & check you are happy with or amend your contact details as listed in the Practitioner area under User Settings.
3. How to find a patient's Shared Files in the DCR
4. How to view a patient's Shared Files
5. How to share a new file with a patient
6. How to edit or delete a Shared File
7. The Shared File email notification the patient or their representative receives when a file is shared/edited/deleted

There are additional User Guides at <https://news.dorsetcouncil.gov.uk/dcr-staff-area/how-to-guides/> to help with **how to log in to the DCR**, how to record a **Discussion to View**, and many others.

1. The Shared File email notification you receive from myDCR when a file is shared, edited or deleted by the patient.



NOTE

To be able to receive Shared File email notifications will depend on whether the 3 criteria outlined in the next slides are satisfied.

- a** The title of the email
- b** The sender of the email
- c** The email only specifies the **name of the file** that has been edited/shared/deleted, where 'edited' will be replaced with 'shared' or 'deleted' depending on the action on the file.
- d** To see the file and who edited/shared/deleted the file, the clinician needs to go to **Messaging - Received Messaging** in the left hand DCR Menu.

a my Dorset Care Record - Shared File Notification

b info@mydorsetcarerecord.co.uk
To: Samantha Belhomme

c This message is to notify you that the file 'SB myDCR rep 16/11 - edited' has been edited.

This file can be viewed and accessed on my Dorset Care Record.
If you need further assistance, please visit <https://support.mydorsetcarerecord.co.uk>

Best regards,
myDCR Support Team

- RECORDS
 - Person Search
 - Recently Accessed
 - Provider Homepage
- WORKLISTS
- FORMS
- TASK LIST
- NOTIFICATIONS
- MY DORSET CARE RECORD
- LINKS
- FEEDBACK
- COLLABORATIVE WORKLISTS
- MESSAGING**
 - Received Messages**
 - Sent Messages

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2. You can only receive an email notification if the following 3 criteria are satisfied:

2.1 You are in a role that can receive notifications for shared files.

- How to check which roles can receive email notifications.

2.2 Your subscriptions are set to administrator defaults.

- How to check the set-up of your notifications.

2.3 You are added to the patient's Care Team in the Circle of Care.

- How to add yourself to the patient's Care Team
- How to check you are happy with or amend your contact details as listed in the Practitioner area under User Settings.

2.1 You are in a role that can receive notifications for shared files.

The roles which can currently (as at July 2023) receive notifications for shared files are determined based on the type of their relationship with the patient:

Receiving shared files notifications	NOT Receiving shared files notifications
Admitting Provider	ACO
Attending Provider	Consulting Provider
Admitting Physician	Care Coordinator
Attending Physician	Midwife
Citizen Portal Provider	Ordering Provider
Clinical Provider	Ordering Physician
Health Visitor	Primary Care Provider
Notification Recipient	REF MD
Patient	Referring Provider
Patient Representative	Transition Care Manager

To find out how you can check whether there's been an update for which roles can receive notifications, please see next slide.

➤ How to check which roles can receive email notifications when their patient has shared a file



From the **DCR Person Search** screen, click on **Notifications** on the left of the screen.

Click on **My Subscriptions**.

Click on **Change to subscribe by Relationship Type**.

The screenshot shows the DCR Person Search interface. The left sidebar contains a menu with the following items: RECORDS (Person Search, Recently Accessed, Provider Homepage), WORKLISTS, FORMS, TASK LIST, NOTIFICATIONS (highlighted with a red box), MY DORSET CARE RECORD, LINKS, FEEDBACK, COLLABORATIVE WORKLISTS, and MESSAGING. The main content area shows the Person Search form with fields for NHS Number and Other Identifier, and a Search button. A red arrow points from the NOTIFICATIONS menu item to the My Subscriptions link in the left sidebar of the second screenshot.

The second screenshot shows the My Subscriptions settings page. The left sidebar is identical to the first screenshot, but the NOTIFICATIONS menu item is expanded to show My Subscriptions (highlighted with a red box). The main content area shows the My Subscriptions settings page. The page title is "Subscriptions are set to administrator defaults." The page contains a form with the following fields: My Email Address (laura.bonner@dorsetcouncil.gov.uk), My Webmail (laura.bonner@dorsetcouncil.gov.uk), and By default. The By default section has the following options: Notify By Concerto User Messaging (checked), Notify By Email (unchecked), Notify By No Delivery (unchecked), Notify By Secure Webmail (unchecked), Notify in Daily Summary Email (checked), Notify in Daily Summary Secure Webmail (unchecked), and Notify in Daily Summary Concerto User Messaging (checked). Below the form, there is a section titled "Subscriptions for patients I have a relationship with" with a table of notification options and delivery options. The table has the following data:

Notification	Delivery Options
<input checked="" type="checkbox"/> New Shared File - By Patient	Custom Change
<input checked="" type="checkbox"/> Shared File Deleted - By Patient	Custom Change
<input checked="" type="checkbox"/> Shared File Edited - By Patient	Custom Change

At the bottom of the page, there is a blue banner with an information icon and the text: "You can alternatively subscribe to notifications differently for each type of relationship with the patient. [Change to subscribe by Relationship Type](#)" (the link is highlighted with a red box).

Here you will see listed all the roles which can receive notifications about a shared file from the patient

Subscriptions for patients where I am the Admitting Physician

- Notification
- New Shared File - By Patient
- Shared File Deleted - By Patient
- Shared File Edited - By Patient

Subscriptions for patients where I am the Admitting Provider

- Notification
- New Shared File - By Patient
- Shared File Deleted - By Patient
- Shared File Edited - By Patient

Subscriptions for patients where I am the Attending Physician

- Notification
- New Shared File - By Patient
- Shared File Deleted - By Patient
- Shared File Edited - By Patient

Subscriptions for patients where I am the Attending Provider

- Notification
- New Shared File - By Patient
- Shared File Deleted - By Patient
- Shared File Edited - By Patient

Subscriptions for patients where I am the Clinical Provider

Subscriptions for patients where I am the Health Visitor

- Notification Delivery Options
- New Shared File - By Patient Custom Change
- Shared File Deleted - By Patient Custom Change
- Shared File Edited - By Patient Custom Change

Subscriptions for patients where I am the Notification Recipient

- Notification Delivery Options
- New Shared File - By Patient Custom Change
- Shared File Deleted - By Patient Custom Change
- Shared File Edited - By Patient Custom Change

Subscriptions for patients where I am the Patient

- Notification Delivery Options
- New Shared File - By Patient Custom Change
- Shared File Deleted - By Patient Custom Change
- Shared File Edited - By Patient Custom Change

Subscriptions for patients where I am the Patient Representative

- Notification Delivery Options
- New Shared File - By Patient Custom Change
- Shared File Deleted - By Patient Custom Change
- Shared File Edited - By Patient Custom Change

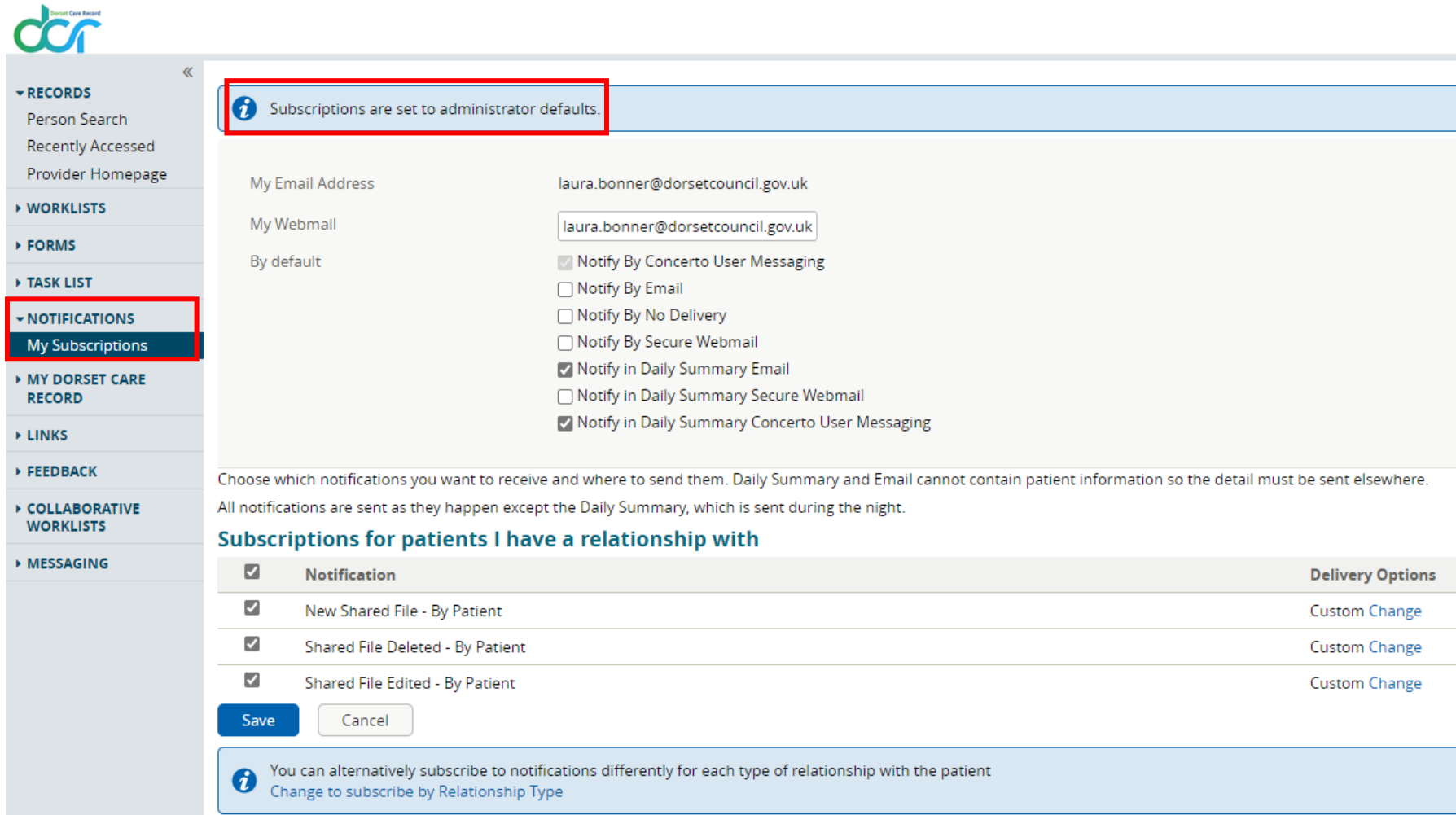
Subscriptions for patients where I am the my Dorset Care Record Provider

- Notification Delivery Options
- New Shared File - By Patient Custom Change
- Shared File Deleted - By Patient Custom Change
- Shared File Edited - By Patient Custom Change

Save Cancel

i You can alternatively subscribe to the same notifications for all patients regardless of the type of relationship. Change to subscribe the same way for all patients

2.2 Your notifications are set to administrator defaults under Notifications – My Subscriptions.



Subscriptions are set to administrator defaults.

My Email Address: laura.bonner@dorsetcouncil.gov.uk

My Webmail: laura.bonner@dorsetcouncil.gov.uk

By default:

- Notify By Concerto User Messaging
- Notify By Email
- Notify By No Delivery
- Notify By Secure Webmail
- Notify in Daily Summary Email
- Notify in Daily Summary Secure Webmail
- Notify in Daily Summary Concerto User Messaging

Choose which notifications you want to receive and where to send them. Daily Summary and Email cannot contain patient information so the detail must be sent elsewhere. All notifications are sent as they happen except the Daily Summary, which is sent during the night.

Subscriptions for patients I have a relationship with

<input checked="" type="checkbox"/> Notification	Delivery Options
<input checked="" type="checkbox"/> New Shared File - By Patient	Custom Change
<input checked="" type="checkbox"/> Shared File Deleted - By Patient	Custom Change
<input checked="" type="checkbox"/> Shared File Edited - By Patient	Custom Change

[Save](#) [Cancel](#)

You can alternatively subscribe to notifications differently for each type of relationship with the patient
[Change to subscribe by Relationship Type](#)

2.3 You are added to the patient's Care Team in the Circle of Care.

1 To add yourself to a patient's Circle of Care, from the patient's **DCR record**, either from the **Summary** tab or **my Dorset Care Record** tab:

a. Click on the **Circle of Care**

b. Click on **Add**

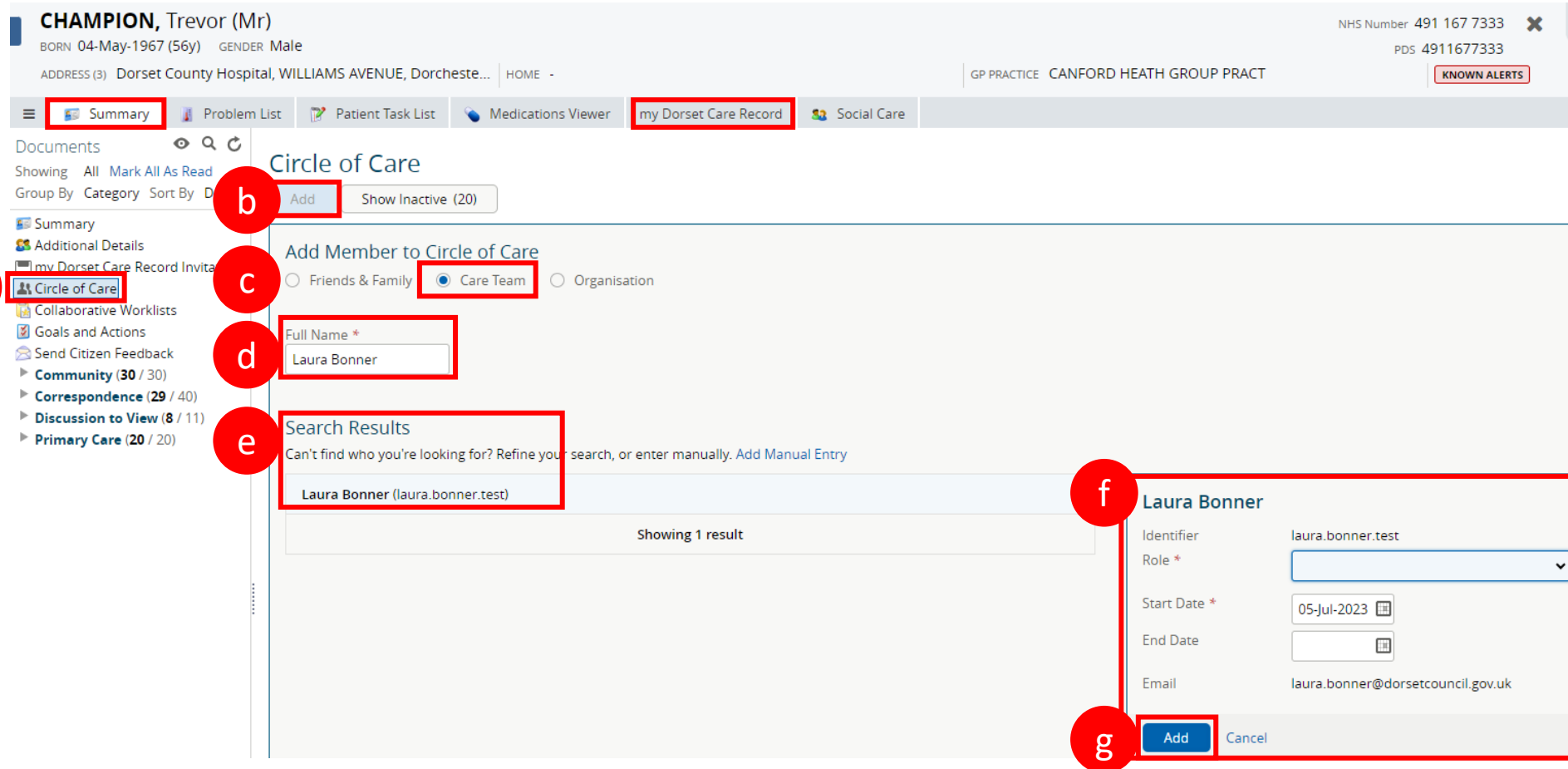
c. Select the **Care Team** radio button

d. Enter your **Full Name**

e. Click on your name in the **Search Results**

f. Complete the fields for **Role**, **Start Date** and **End Date** in the box that appears

g. Click on **Add**.



The screenshot shows the patient record for Trevor Champion (Mr), born 04-May-1967 (56y), male, with address Dorset County Hospital, Williams Avenue, Dorchester. The 'my Dorset Care Record' tab is selected. The 'Circle of Care' section is open, showing an 'Add' button (b) and radio buttons for 'Friends & Family', 'Care Team' (c), and 'Organisation'. A 'Full Name *' field (d) contains 'Laura Bonner'. A search results box (e) shows 'Laura Bonner (laura.bonner.test)'. A modal form (f) for 'Laura Bonner' is open, with fields for Identifier (laura.bonner.test), Role (dropdown), Start Date (05-Jul-2023), End Date, and Email (laura.bonner@dorsetcouncil.gov.uk). An 'Add' button (g) is at the bottom of the modal.

➤ **Care Team members should check their contact details in the Practitioner area under User Settings, as these details will be visible to patients.**



2 From the **Person Search** page or from within a patient's DCR record, click on your **Username**, and a drop-down box will expand.

3 Click on **User Settings**.

4 In the **Practitioner** area, update your **Mobile and Work Phone numbers** as needed.

5 Click on **Update Preferences**.

6 Click on **Person Search** or **Recently Accessed** to return to the Person Search homepage or Recently Accessed, respectively.

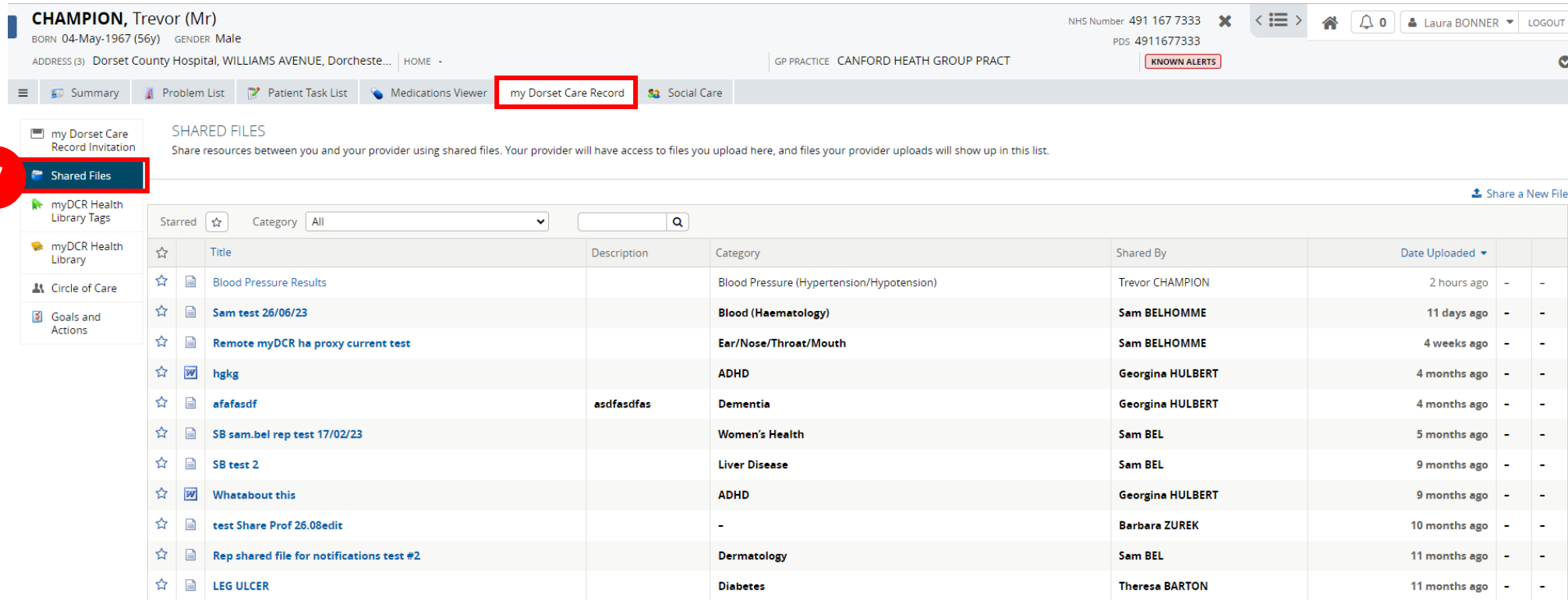
The screenshot shows the 'My Details' page for user 'laura.bonner.test'. The left sidebar contains navigation options: RECORDS (Person Search, Recently Accessed, Provider Homepage), WORKLISTS, FORMS, TASK LIST, NOTIFICATIONS, MY DORSET CARE RECORD, LINKS, FEEDBACK, COLLABORATIVE WORKLISTS, and MESSAGING. The main content area includes sections for 'My Details' (Username, Start Screen, Roles I perform), 'Users' (E-mail), 'Dorset Users' (Primary Role, Sector, Organisations, Facility, Specialty), 'Notifications' (My EMR, Mobile, My Webmail, Email), and 'Practitioner' (Mobile, Work Phone). A note states: 'The information in this section relates to Circle of Care. It will be visible to Citizen Portal users.' The 'Update Preferences' button is highlighted in red.

NOTE

The contact details listed here will be visible to all patients to whose Circle of Care the Care Team member is added to. In the **Circle of Care** user guide for patients, patients have been directed to not use the **Care Team** staff contact details unless they've been advised to do so.

3. Finding a patient's Shared Files in the DCR

7 You can access a patient's **Shared Files** from **my Dorset Care Record** tab.



CHAMPION, Trevor (Mr)
 BORN 04-May-1967 (56y) GENDER Male
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste... HOME -
 GP PRACTICE CANFORD HEATH GROUP PRACTICE
 NHS Number 491 167 7333 PDS 4911677333
 Laura BONNER LOGOUT

Summary Problem List Patient Task List Medications Viewer **my Dorset Care Record** Social Care

7 my Dorset Care Record Invitation
 Shared Files
 myDCR Health Library Tags
 myDCR Health Library
 Circle of Care
 Goals and Actions

SHARED FILES
 Share resources between you and your provider using shared files. Your provider will have access to files you upload here, and files your provider uploads will show up in this list.

Starred ☆ Category All

Starred	Title	Description	Category	Shared By	Date Uploaded
☆	Blood Pressure Results		Blood Pressure (Hypertension/Hypotension)	Trevor CHAMPION	2 hours ago
☆	Sam test 26/06/23		Blood (Haematology)	Sam BELHOMME	11 days ago
☆	Remote myDCR ha proxy current test		Ear/Nose/Throat/Mouth	Sam BELHOMME	4 weeks ago
☆	hgkg		ADHD	Georgina HULBERT	4 months ago
☆	afasdf	asdfasdf	Dementia	Georgina HULBERT	4 months ago
☆	SB sam.bel rep test 17/02/23		Women's Health	Sam BEL	5 months ago
☆	SB test 2		Liver Disease	Sam BEL	9 months ago
☆	Whatabout this		ADHD	Georgina HULBERT	9 months ago
☆	test Share Prof 26.08edit		-	Barbara ZUREK	10 months ago
☆	Rep shared file for notifications test #2		Dermatology	Sam BEL	11 months ago
☆	LEG ULCER		Diabetes	Theresa BARTON	11 months ago

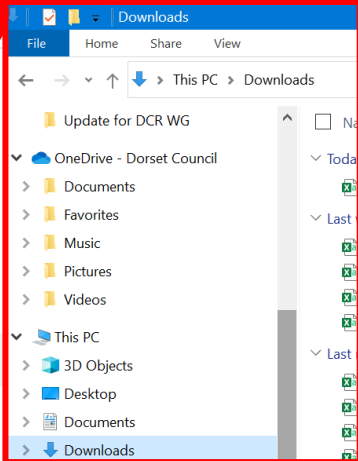
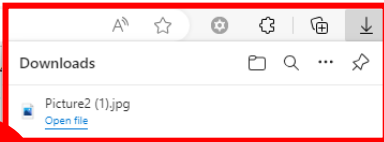
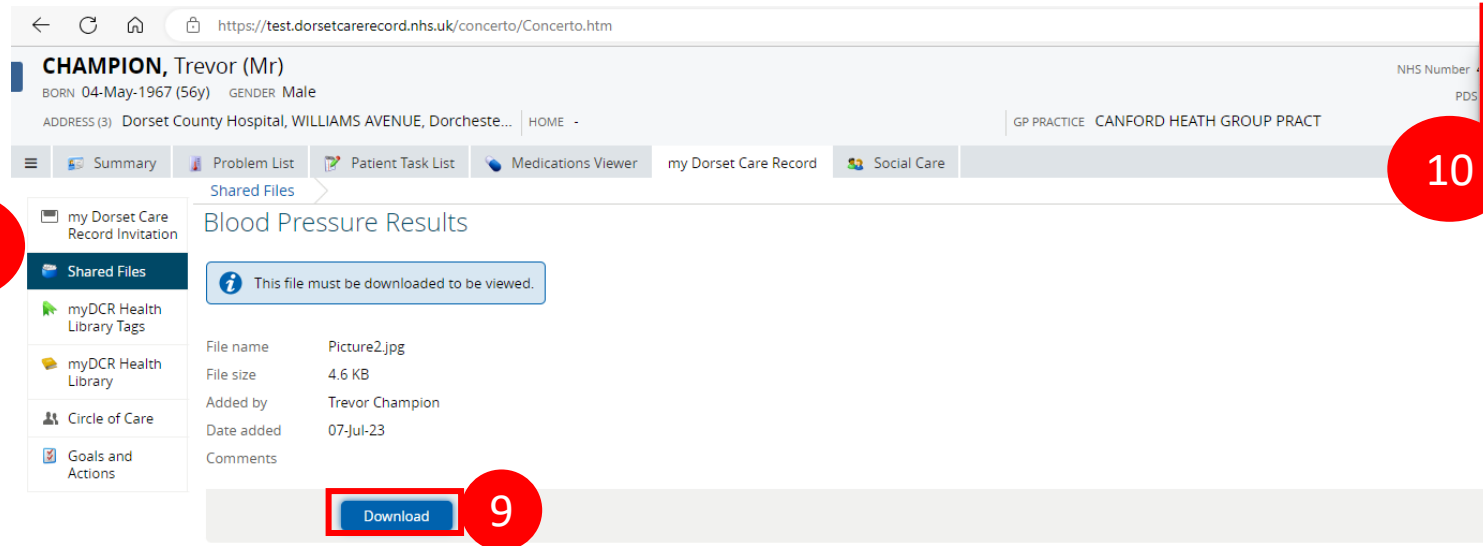
8 To view a **Shared File**, click on a file in the list.

4. Viewing a patient's Shared Files in the DCR

When you've clicked on a shared file, depending on the type of file extension, some files will open on your screen, whilst others will need downloading before you can view them.

9 If you've clicked on a file that has a Download button, click on **Download**.

The shared file will download onto the computer you are using (This PC>Downloads).



11

10 To view the file, click on **Open file** here or navigate to the **Downloads** location on your computer.

NOTE You **MUST** delete any downloaded shared file documents to your computer before you log off and **MUST NOT** use any shared computers to download any shared files. Other staff should not have access to your patient's personal information and your computer needs to be password protected.

11 To return to the list of **Shared File**, click on the **Shared File** tab.

5. How to share a new file with a patient

12

Click on the **Share a New File** link to the right of the screen.

CHAMPION, Trevor (Mr)
 BORN 04-May-1967 (56y) GENDER Male
 ADDRESS (B) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste... HOME -
 GP PRACTICE CANFORD HEATH GROUP PRACT

my Dorset Care Record Invitation
 Shared Files
 myDCR Health Library Tags
 myDCR Health Library
 Circle of Care

SHARED FILES
 Share resources between you and your provider using shared files. Your provider will have access to files you upload here, and files your provider uploads will show up in this list.

Starred ☆ Category All

☆	Title	Description	Category	Shared By	Date Uploaded
☆	Blood Pressure Results		Blood Pressure (Hypertension/Hypotension)	Trevor CHAMPION	2 hours ago

Share a New File

12

13

Click on **Select File** and select the relevant file from your computer.

Share a New File

File *

Title *

Description

Category

Share Cancel

14

14

Complete the mandatory **Title** field and any other required fields.

15

15

Click on the **Share** button.

The newly shared file will appear at the top of the list.

my Dorset Care Record Invitation
 Shared Files
 myDCR Health Library Tags
 myDCR Health Library
 Circle of Care

SHARED FILES
 Share resources between you and your provider using shared files. Your provider will have access to files you upload here, and files your provider uploads will show up in this list.

Starred ☆ Category All

☆	Title	Description	Category	Shared By	Date Uploaded
☆	Globe picture		-	Laura BONNER	< 15 minutes ago

Share a New File

6. How to edit or delete a Shared File

NOTE

A file that you have shared with a patient can ONLY be **edited** or **deleted** by you and not the patient. It will be received as a *read-only* file by the patient. Similarly, when a patient shares a file with you, you will receive a read-only file from the patient.

16 To edit file details or delete the **Shared File**, click on the **Edit** or **Delete** button, respectively.

17 Click on the **Star** to make a shared file a favourite, if it is a file that you tend to share often or would like to pin to a patient.

18 Select the **Starred star icon** to get a filtered view of just your favourite files.

19 Search for a shared file by **Category** or in the rectangle with the **magnifying glass icon**.

18 Starred **19** Category All

☆	Title	Description	Category	Shared By	Date Uploaded	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="checkbox"/>	Globe picture		-	Laura BONNER	< 15 minutes ago	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Edit File Details

File * Globe.png

Title *

Description

Category

Remove File from Shared Files

Globe picture is about to be permanently removed. It will no longer be accessible by anyone.

Reason for removal *

7. The Shared File email notification the patient or their representative receives when a file is shared, edited or deleted.

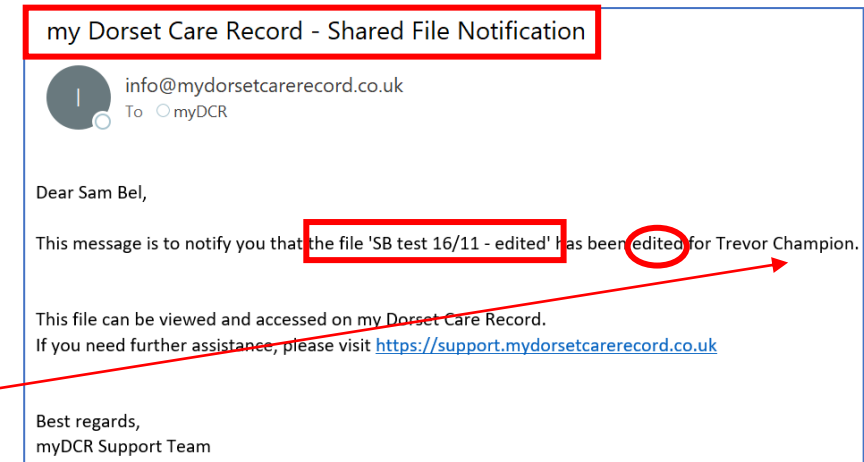


- The title of the email
- The sender of the email
- The email only specifies the **name of the file** that has been edited/shared/deleted, where 'edited' will be replaced with 'shared' or 'deleted' depending on the action on the file.
- The representative will also be told the **name of the patient** they represent and whom the file belongs to.
- To see the file and who edited/shared/deleted the file, the patient or their representative need to login to myDCR.

The email the patient will receive.



The email the patient's rep will receive.



Access further **support and information** from
<https://news.dorsetcouncil.gov.uk/dcr-staff-area/learning-resources/>

Disclaimer

The screenshots in this training guide are taken from a test system and as such may vary slightly to the live DCR system.

Screenshots in this training guide do not contain any real patient data.

Data provided by source systems is read-only in DCR. There are various level of restrictions and sensitivities being applied within the Partner's systems, and the DCR respects and displays the data as provided by the Partners.

The information contained within the NHS Dorset system (the Spine) is the overriding system for updating demographics.