# 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**

# Clinical documents in the DCR

Dorset Care Record

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

# Objectives

This user guide will help you to

- Find a person's **Clinical Documents** in the summary information
- **View** the clinical documents displayed
- **Understand** which clinical documents are in the DCR
- **Sort** the clinical documents using the Configuration options
- Access **support and further information**

# The clinical documents in the DCR

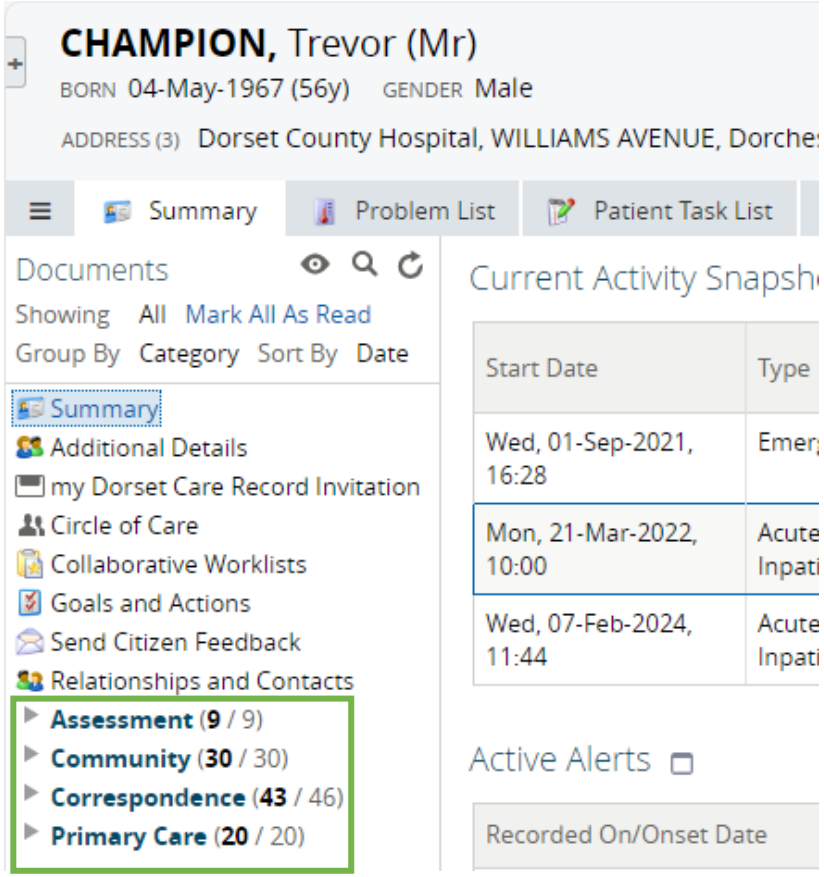
The clinical documents that come into the DCR are fed through from the following Partners:

- Dorset County Hospital (DCH)
- University Hospitals Dorset (UHD)
- Dorset Council (DC)
- Dorset HealthCare (DHC)

The clinical documents include letters (correspondence), reports, plans, assessments, images etc.

Following the selection of a person's record, the clinical documents are displayed on the left side of the **Summary** tab in the **Clinical Document View (CDV)**, also referred as the **CDV tree.**

They are positioned alongside **Primary Care**, **Community**, **Pathology**, **Radiology**.



# The Clinical Document Viewer is made up of Folders

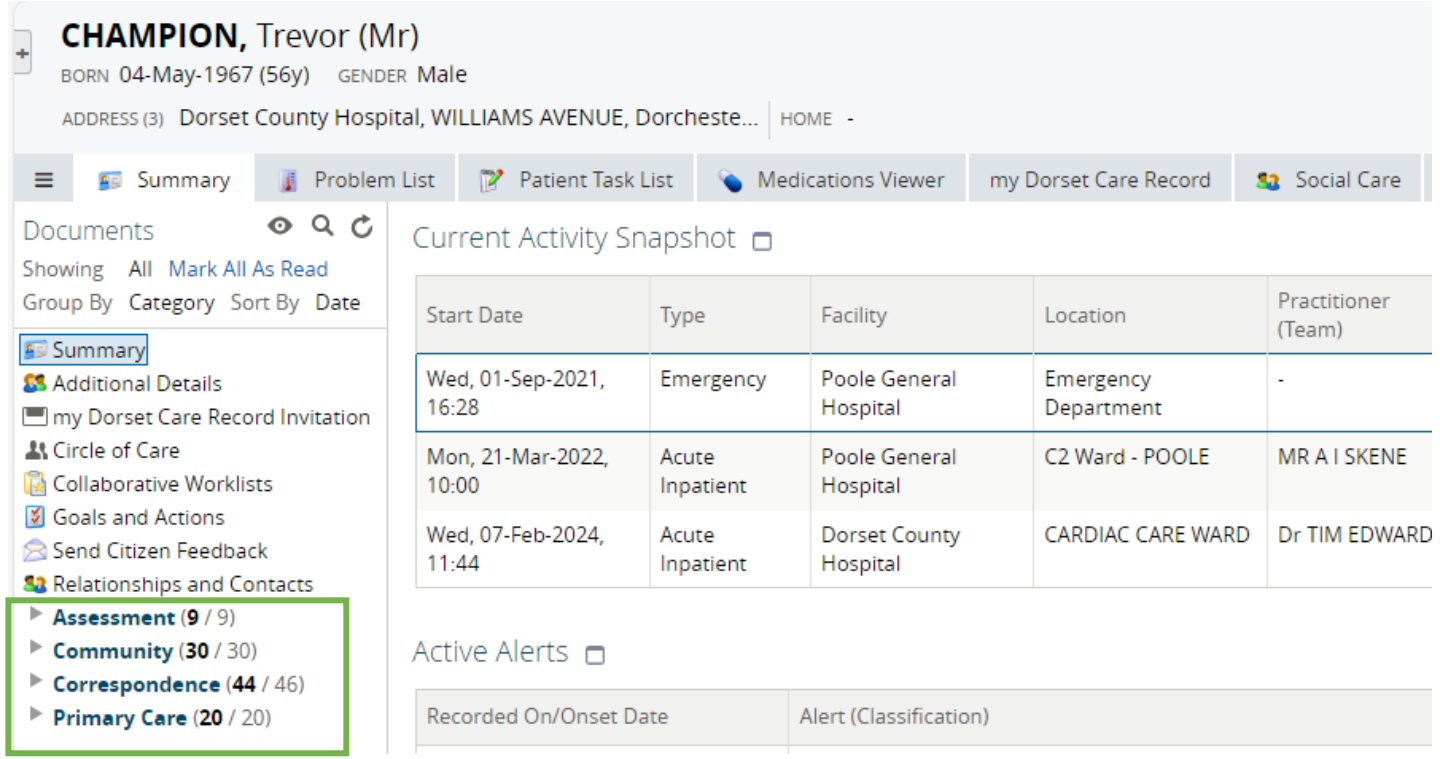
The CDV tree contains the list of available documents indexed into the following **folders,** but which **will only show** in a person's record if they contain any documents i.e. letters, reports, plans, assessments etc.:

- **Assessments**
- **Care Plans**
- **Clinical Notes**
- **Correspondence**
- **Reports**

Please note the difference in the 2 example screenshots in the type of folders displayed for the 2 separate records.

The folders show a count alongside each folder's name indicating the number of documents it contains.

**Example 1**




**Example 2**

# Folders include sub-folders; sub-folders include documents

The folders may include sub-folders, and the sub-folders include the documents received from the Partners.

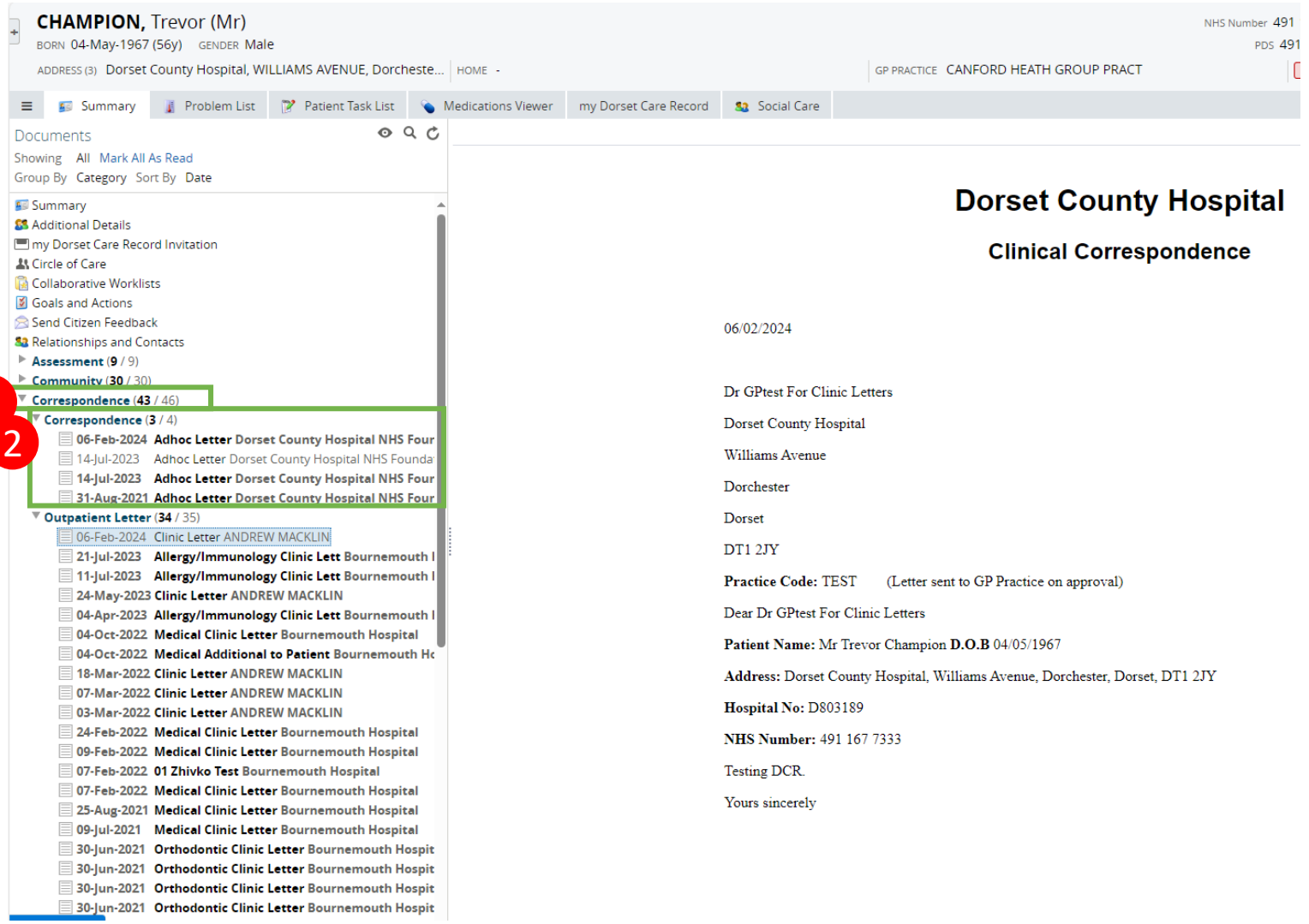
1. Click on a **folder's title** in the **CDV tree** to open the folder and reveal the **sub-folders** it is made up of.

   For example, as in our example screenshot, when clicking on the **Correspondence folder**, this expands to show the **Correspondence and Outpatient letter sub-folders**.

   To hide the folder's contents, and close the folder, click on the folder's title again.

2. Each **sub-folder** contains individual **documents**.

   For example, clicking on the **Correspondence sub-folder**, this expands to show **4 letters**.

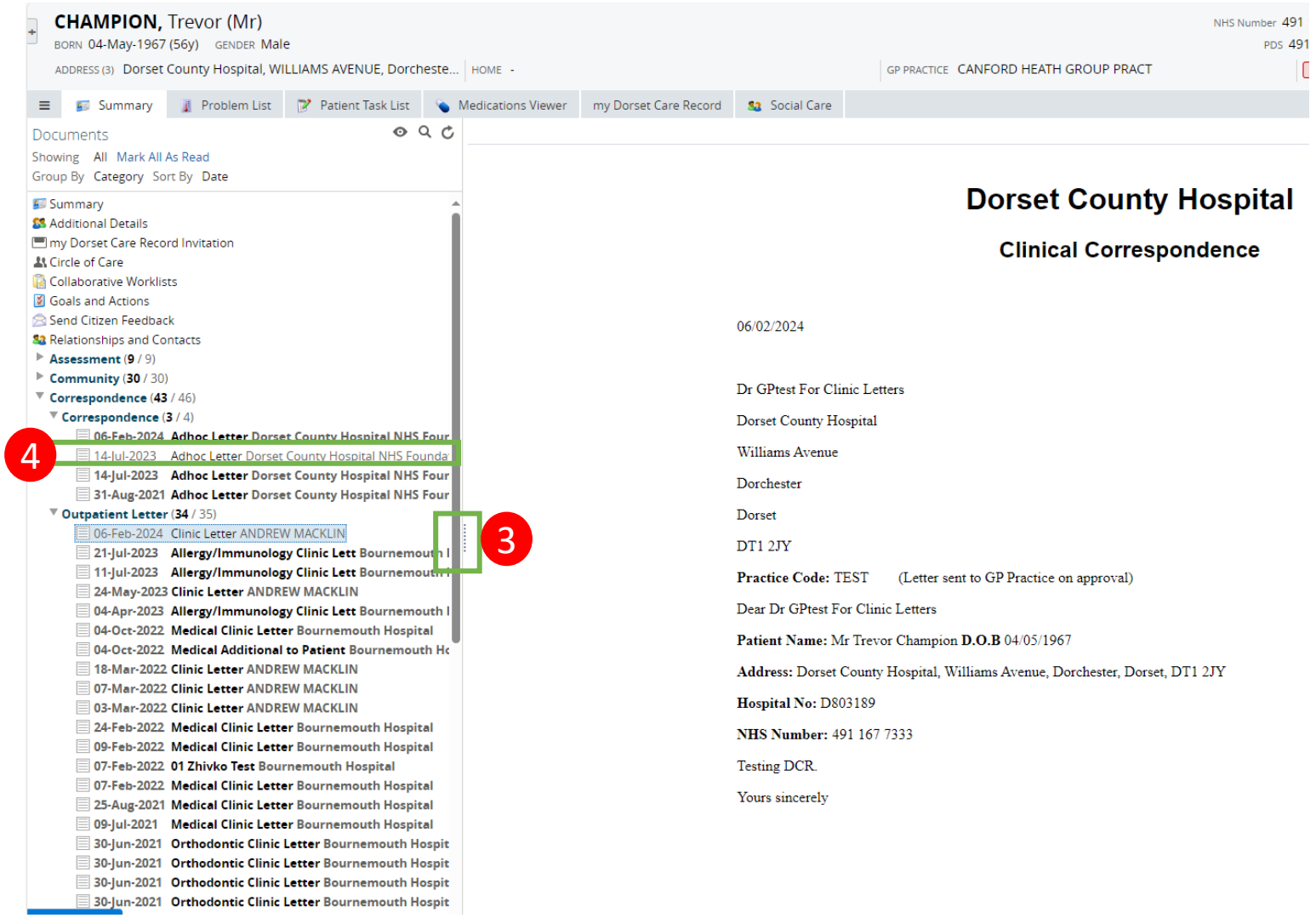


# Folders include sub-folders; sub-folders include documents

3 Please note that you can change the **width of the CDV tree** by clicking on the **dividing dotted line** and dragging it across to the right of the screen.

4 An unread document by the user will display in **bold** in the CDV tree.

Clicking on the tittle of an individual document, displays the document on the right-hand side of the screen – this will also **unbold** the document in the CDV tree.



# The CDV tree folders, sub-folders and documents (letters, reports, plans, assessments etc.) from UHD, DCH, DHC, DC

| Folder | Sub-folder | Partner | Description of documents |
|---|---|---|---|
| Assessments | • Pre-op Assessment<br>• Social services assessment | • DCH<br>• DC | • DCH myPreOp Assessment<br>• DC social services AMHP report |
| Care Plans | • MDT Plan | • DCH | • MDT Outcome from SCR Oncology Multidisciplinary Team (MDT) |
| Clinical Notes | • Medical note (pending)<br>• Summary record<br>• Infection control (pending)<br>• Obstetrics | • DCH | • Ophthalmology (mediSight)<br>• SCR Summary Oncology MDT Record<br>• ICNet clinical note<br>• Badgernet Maternity Obstetrics |
| Correspondence | • Correspondence (DCH and DHC)<br>• Outpatient letter (UHD, DCH and DHC)<br>• Unscheduled care (UHD and DCH)<br>• Discharge letter for inpatients (UHD, DCH and DHC)<br>• Referral letter (pending) (DCH)<br>• Letter to patient (DCH) | • UHD<br>• DCH<br>• DHC | • DCH Ad-hoc Letters from PAS. DHC additional data (appointments and documents) following a Coroner's report.<br>• Clinic letters - UHD specialties letters from eCamis or UHD eForms. DCH specialties letters from PAS, DPR, Cardiology (Solus), Diabetes , Gastro (Medefer), Ophthalmology (mediSight)-pending. DHC additional data (appointments and documents) following a Coroner's report.<br>• ED discharge letter<br>• UHD letter includes day case. DCH many specialties letter (ICE). DHC additional data (appointments and documents) following a Coroner's report<br>• DCH Ophthalmology (mediSight)<br>• DCH SCR Patient Letter Oncology (Somerset RMS) |
| Reports | • ECG<br>• Cardiac investigation<br>• Echo<br>• Ambulatory BP monitoring<br>• Endoscopy Report | • DCH | • Cardiology (PRISM)<br>• Cardiology (PRISM)<br>• Cardiology (PRISM)<br>• Cardiology (PRISM)<br>• Endoscopy |

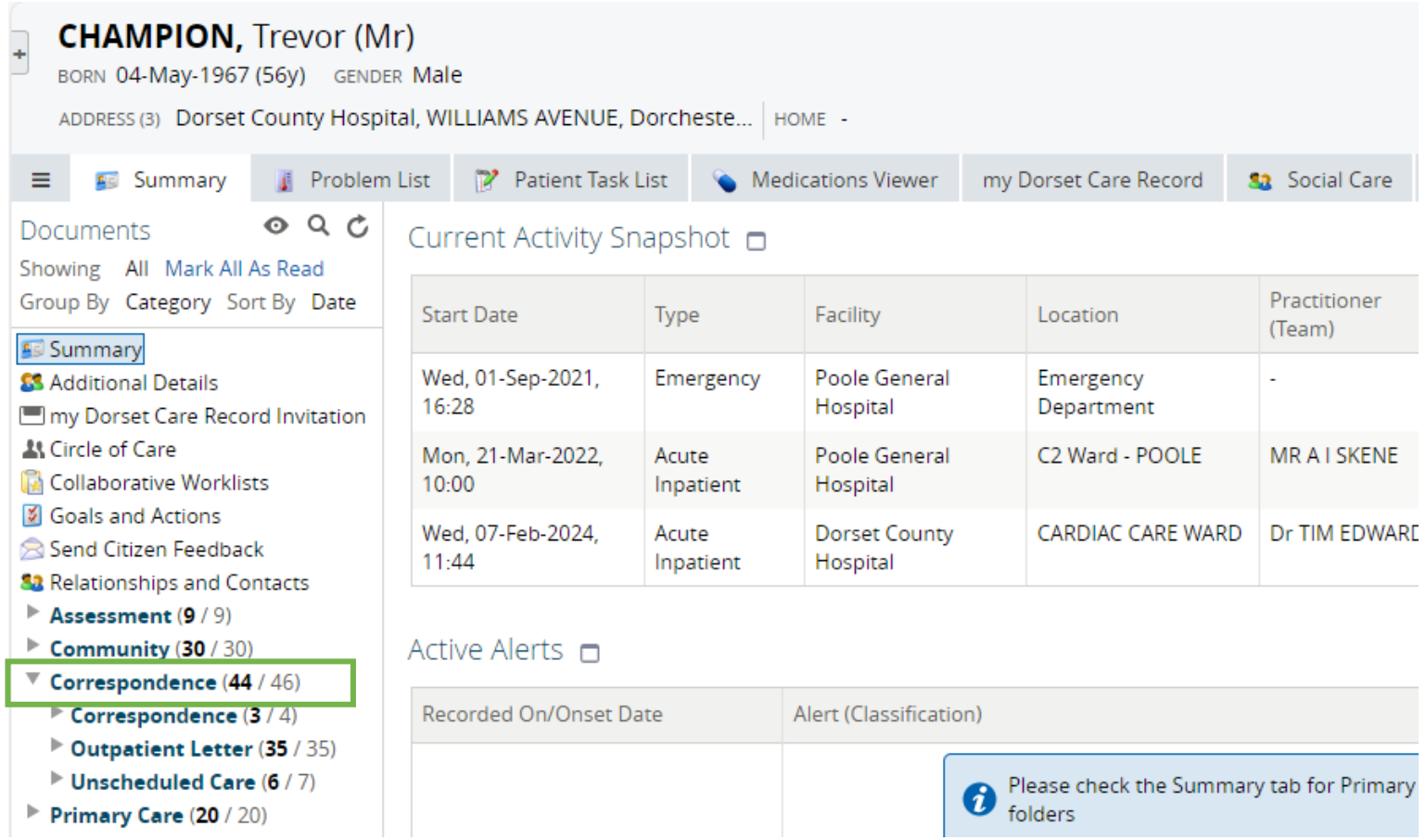
*Please note that more documents are pending, including additional Clinical Notes, Correspondence documents from DCH, HICSS reports, Cardiology reports, Rheumatology review and Dermatology review from UHD.*

# Unread documents show in bold

There is **bold black font** in the CDV tree alongside normal font to ease your navigation of the DCR and alert you to documents that need reading.

The correspondence in the example below shows there are 46 letters in total.

When the numbers are in **bold** it means the letters are **unread**. In the example above, there are 44 letters that are unread.



# Read documents show in normal text

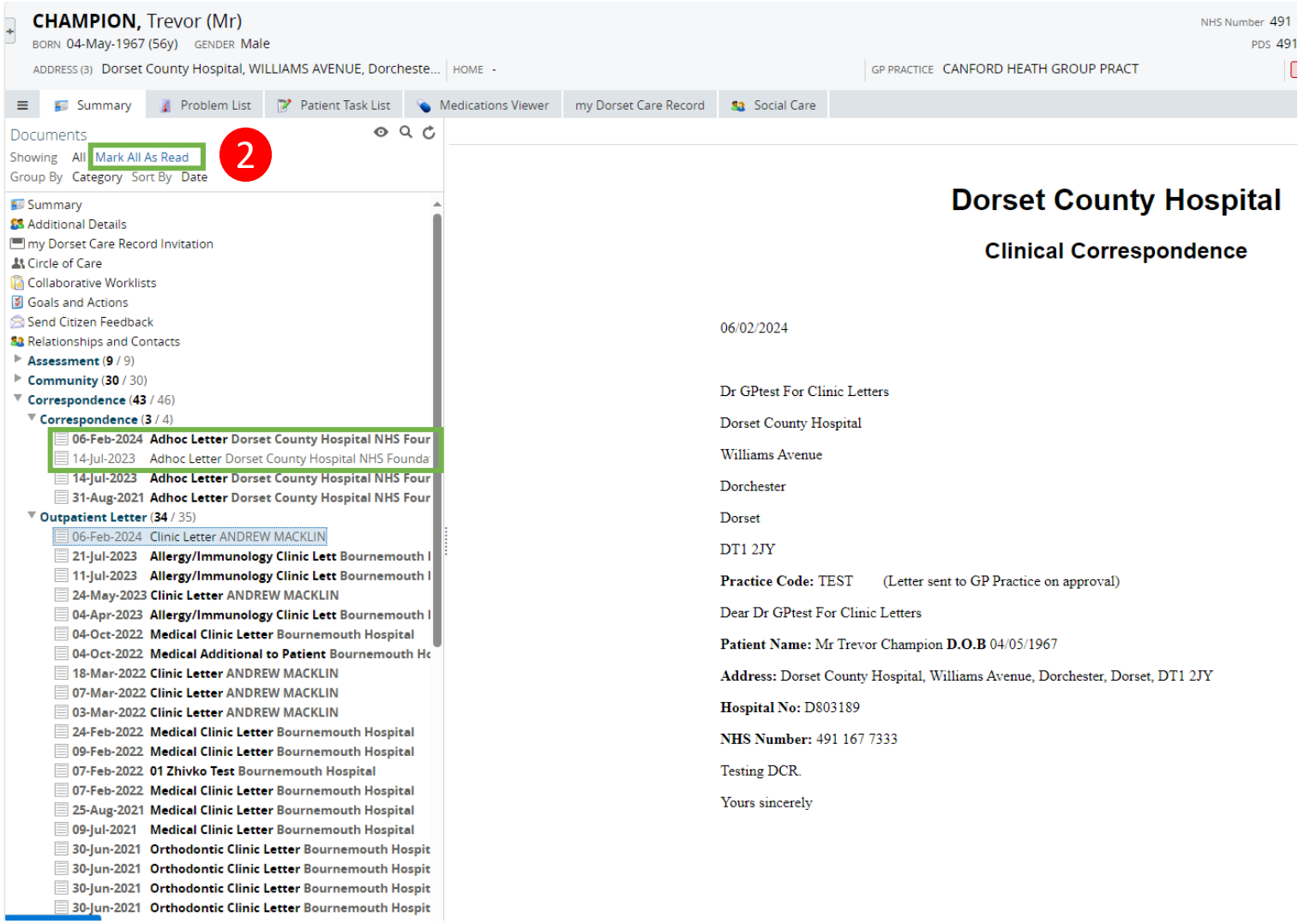
When documents have been read, they will then display in normal text.

Please note that if you have previously read a document and it is displayed in bold in the CDV tree, this is an indication that the document has been updated since you last read it and you should read it again.

Please also note that you can

1. Mark each document in turn as read or unread. Please see next slide.

2. Mark all documents as read by clicking on Mark All As Read.



# Marking a document as Read or Unread

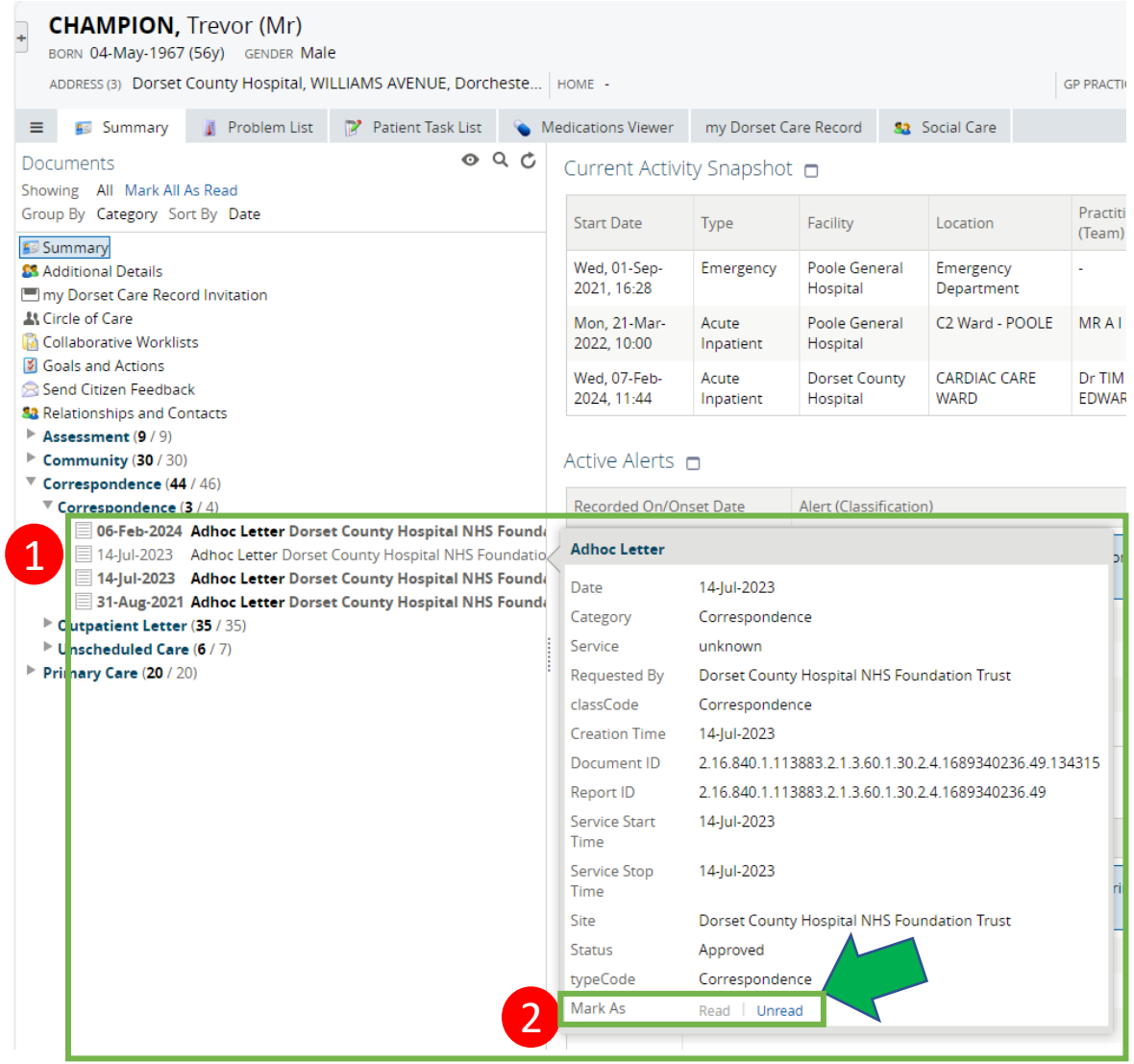
Documents can be marked as having been **Read** or **Unread** by a user.

1. Hover the mouse over a document title in the CDV tree, and you will see a **lightbox** appear with the available metadata for the document. This will provide a **summary** of the letter/document.

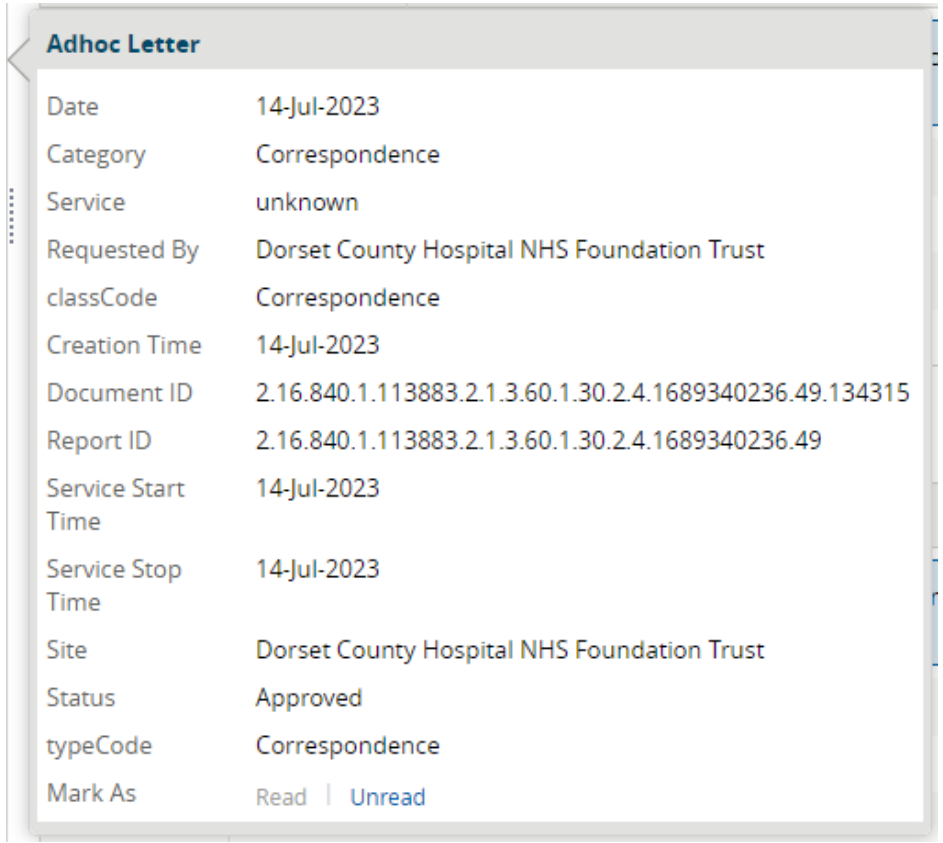
For example, please see the lightbox that appears when we hover over the correspondence letter entitled **'Adhoc Letter Dorset County Hospital'**.

2. In the **Lightbox**, click on the **Read** option to mark a document as Read, or to flag a document as Unread, click on the **Unread** option.

This example shows the document is currently Read by you.



# Lightbox definitions



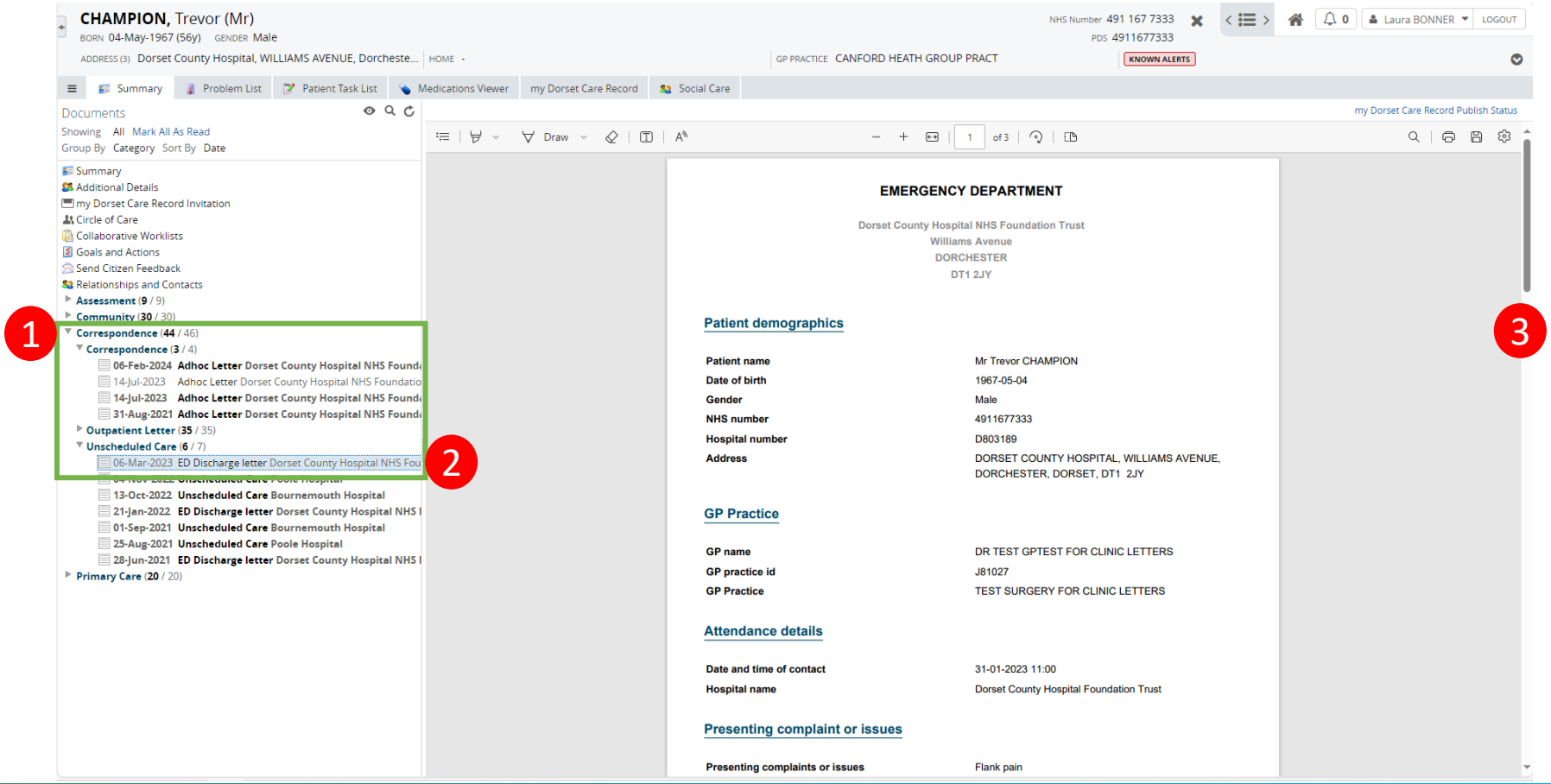

| Item | Description |
|---|---|
| Date | Date of the letter |
| Category | Type of document i.e. Correspondence |
| Service | The specialty of the document |
| Requested By | The document source |
| classCode | A classification that indicates the kind of document |
| Creation Time | The time the author created the document |
| Document ID | Unique ID of the document |
| Report ID | Unique ID of the report |
| Service Start Time | Start time of the service being documented took place |
| Service Stop Time | Stop time of the service being documented took place |
| Site | The document creation site |
| Status | Approved or otherwise |
| typeCode | Classification of documents within a classCode |
| Mark As | Indicates Read or Unread |

# How to view a document

1. Clicking on a document in the **CDV tree**. For example, if we click on **Correspondence/Unscheduled Care** and then on the **ED Discharge Summary** in the example below, this will display the letter.

2. It will also **un-bold** the document in the CDV tree.

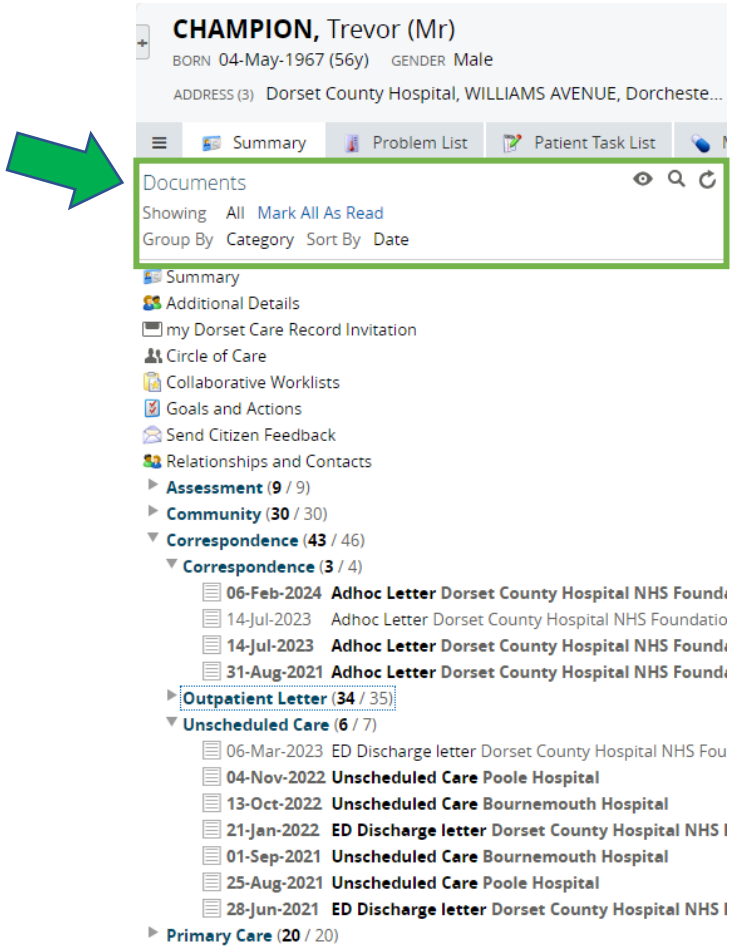
3. And you can scroll down to see the whole letter.



# Group, Sort and Search for documents within a record

The screenshot to the right shows that the clinical documents for this record are grouped by **Category** and sorted by **Date**. This is the default view, but you can group, sort and search for documents within a record.

Please note that you need to be within the person's record to do this and any changes will revert to the default view when you are within a different patient's record.

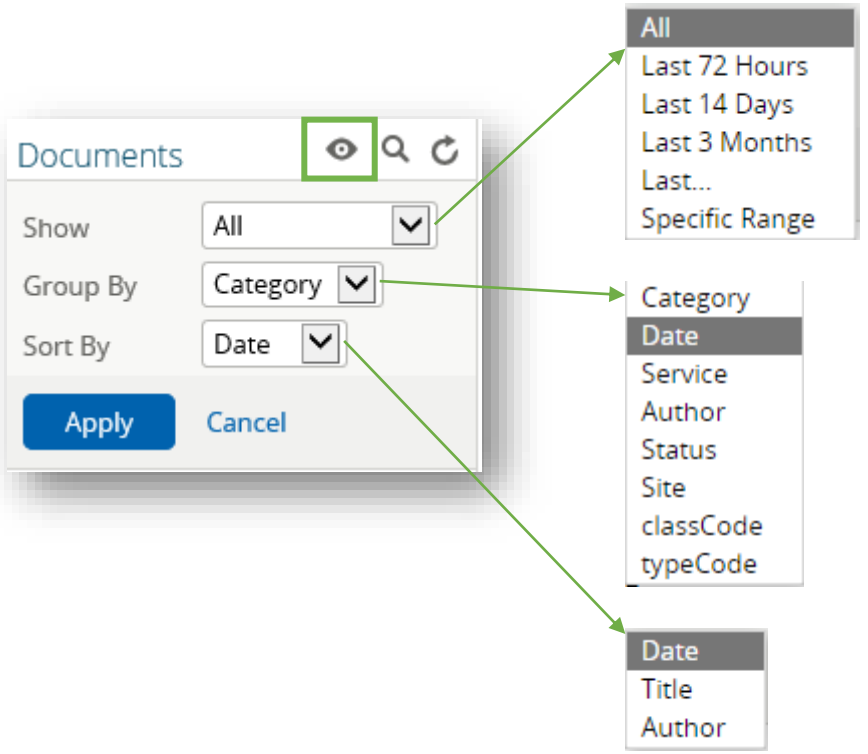


# Use eye symbol to Group and Sort

To group and sort the documents from within a person's record, click on the **eye symbol**

This will help you '**configure the document tree**'. You will have the following options:

- Select **Show** to only show documents from within a specific time range
- Select **Group By** to group documents by date, service, author, status and site
- Select **Sort By** to sort documents by date, title and author.

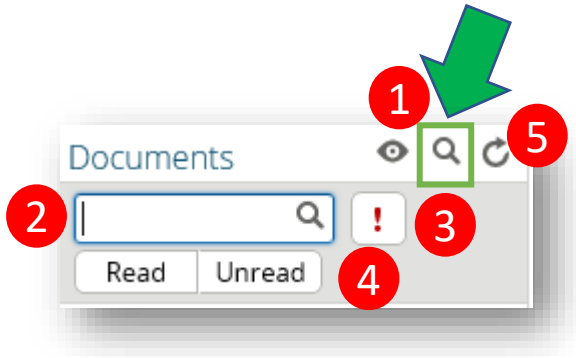


# Use magnifying glass to Search

You can search for a particular keyword or documents within the **Clinical Document View tree** by selecting the **magnifying glass icon** from the person's record.

Please note that any changes will revert to the default view when the patient context is changed.

1. Click on the search icon to open the search window.




2. Type in your search criteria i.e. 'inpatient' and all the letters that have that word in the title will be displayed.

3. Clicking on **exclamation mark** ! will only find letters that have been flagged as **important** i.e. show **abnormal results**.

4. You can also select **Read** to find only letters you have Read or select **Unread** to find only letters you have not read.

5. To remove any search criteria entered and leave the search window blank, ready for a new search criteria entry, click on the refresh symbol button.

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.