



# 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



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

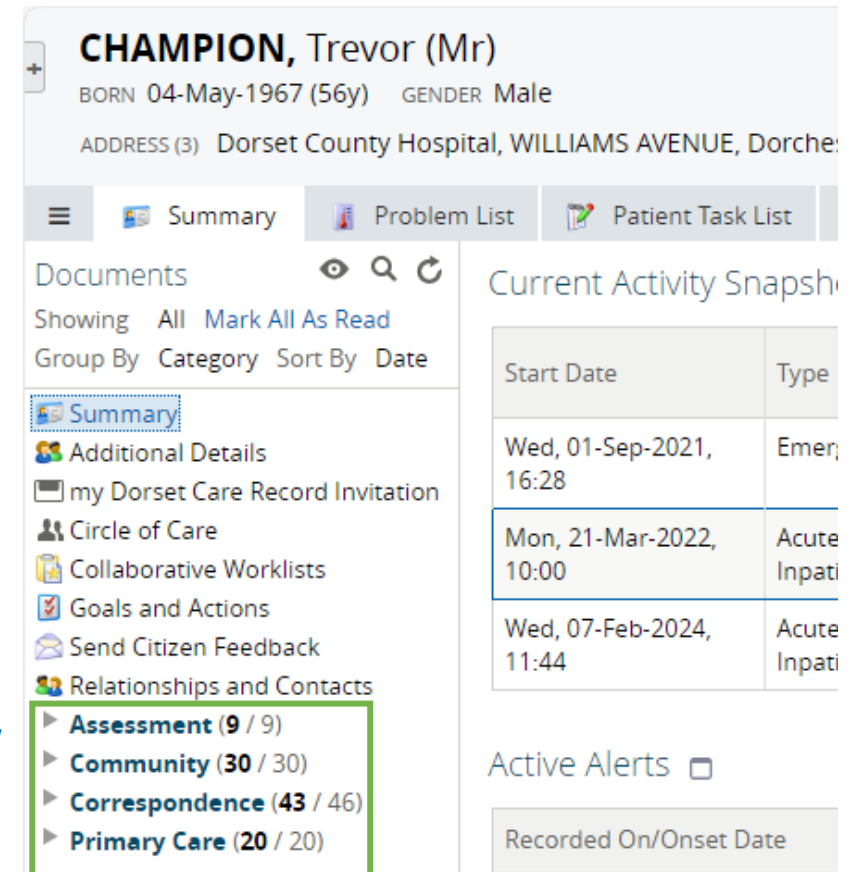
The clinical documents that come into the DCR are fed through from the following Partners:

- 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**.



**CHAMPION, Trevor (Mr)**  
 BORN 04-May-1967 (56y) GENDER Male  
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorchester

Summary Problem List Patient Task List

Documents 👁️ 🔍 ↻  
 Showing All Mark All As Read  
 Group By Category Sort By Date

- Summary
- Additional Details
- my Dorset Care Record Invitation
- Circle of Care
- Collaborative Worklists
- Goals and Actions
- Send Citizen Feedback
- Relationships and Contacts

- ▶ **Assessment (9 / 9)**
- ▶ **Community (30 / 30)**
- ▶ **Correspondence (43 / 46)**
- ▶ **Primary Care (20 / 20)**

Current Activity Snapshot

Start Date	Type
Wed, 01-Sep-2021, 16:28	Emergency
Mon, 21-Mar-2022, 10:00	Acute Inpatient
Wed, 07-Feb-2024, 11:44	Acute Inpatient

Active Alerts

Recorded On/Onset Date

# The Clinical Document Viewer is made up of Folders

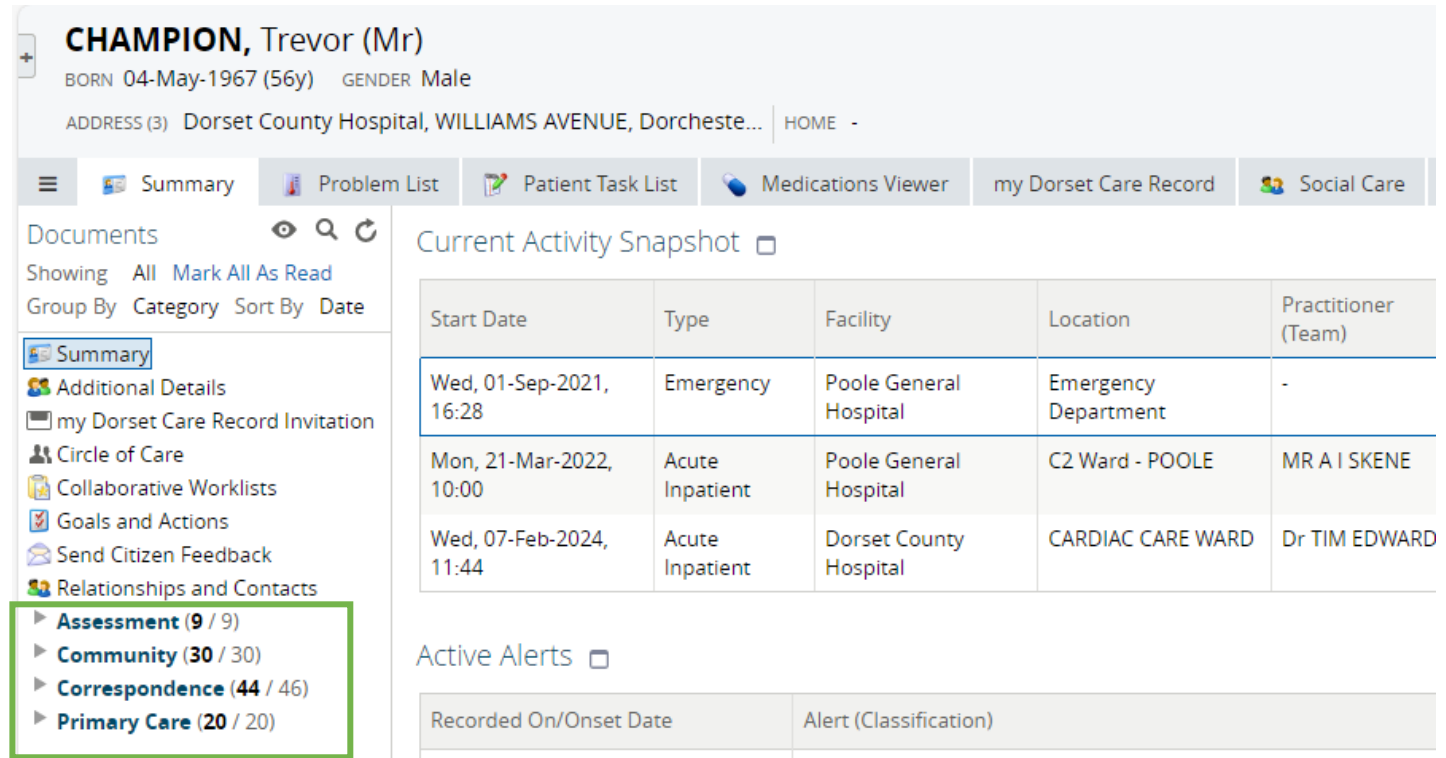
The CDV tree contains the list of available documents indexed into the following **folders**, but which **will only show** in a person's record if they contain any documents i.e. letters, reports, plans, assessments etc.:

- **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



**CHAMPION, Trevor (Mr)**  
 BORN 04-May-1967 (56y) GENDER Male  
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste... HOME -

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

Documents

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

- Summary
- Additional Details
- my Dorset Care Record Invitation
- Circle of Care
- Collaborative Worklists
- Goals and Actions
- Send Citizen Feedback
- Relationships and Contacts
- ▶ **Assessment (9 / 9)**
- ▶ **Community (30 / 30)**
- ▶ **Correspondence (44 / 46)**
- ▶ **Primary Care (20 / 20)**

Current Activity Snapshot

Start Date	Type	Facility	Location	Practitioner (Team)
Wed, 01-Sep-2021, 16:28	Emergency	Poole General Hospital	Emergency Department	-
Mon, 21-Mar-2022, 10:00	Acute Inpatient	Poole General Hospital	C2 Ward - POOLE	MR A I SKENE
Wed, 07-Feb-2024, 11:44	Acute Inpatient	Dorset County Hospital	CARDIAC CARE WARD	Dr TIM EDWARD

Active Alerts

Recorded On/Onset Date	Alert (Classification)
------------------------	------------------------

## Example 2

- ▶ **Care Plans (2 / 3)**
- ▶ **Clinical Notes (3 / 3)**
- ▶ **Correspondence (3 / 3)**
- ▶ **Pathology (301 / 303)**
- ▶ **Patient held records (10 / 13)**
- ▶ **Radiology (14 / 16)**

# 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.

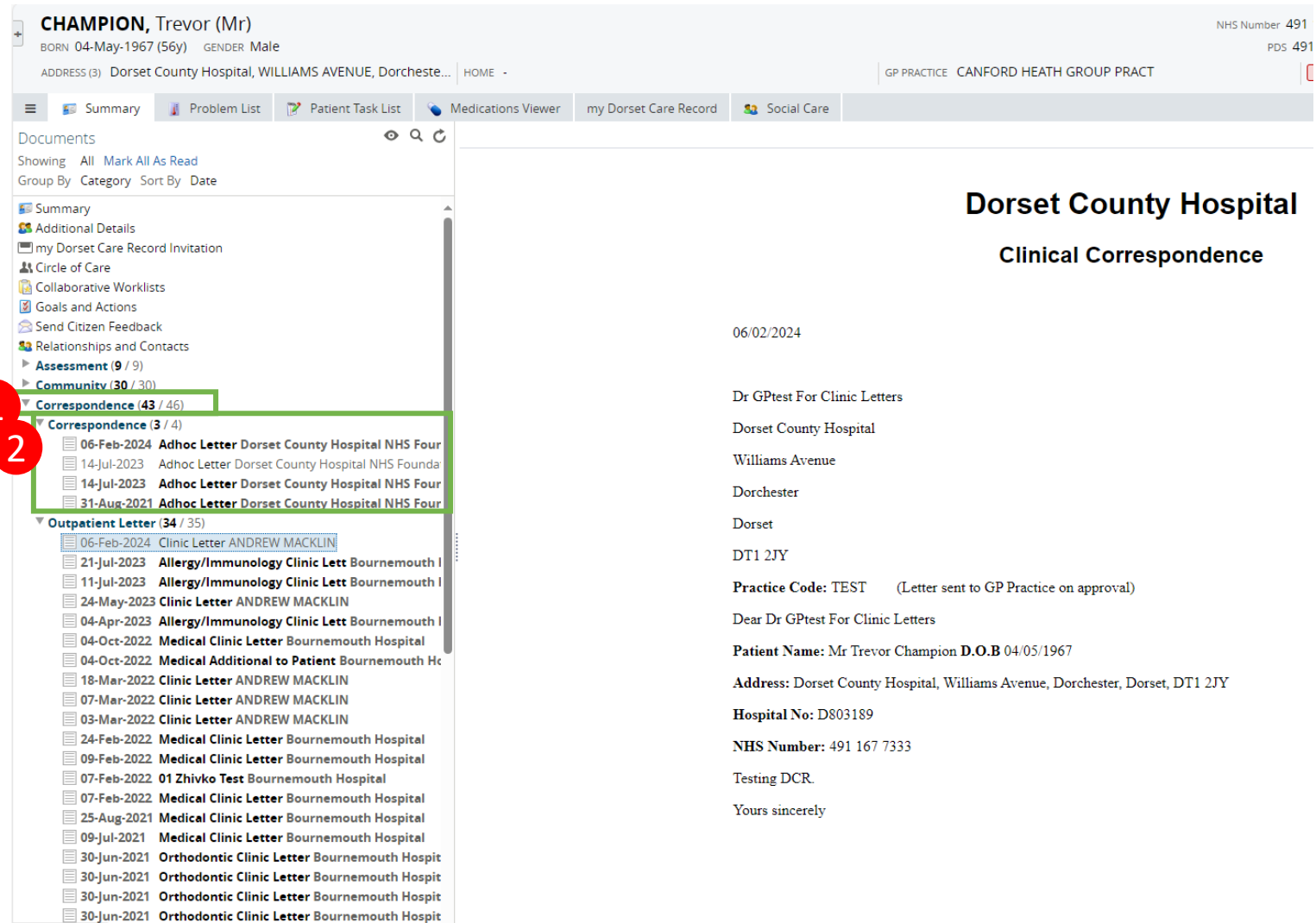
- 1 Click on a **folder's title** in the **CDV tree** to open the folder and reveal the **sub-folders** it is made up of.

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**.



**CHAMPION, Trevor (Mr)** NHS Number 491  
 BORN 04-May-1967 (56y) GENDER Male PDS 491  
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorche... HOME - GP PRACTICE CANFORD HEATH GROUP PRACT

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

- Summary
- Additional Details
- my Dorset Care Record Invitation
- Circle of Care
- Collaborative Worklists
- Goals and Actions
- Send Citizen Feedback
- Relationships and Contacts
- Assessment (9 / 9)
- Community (30 / 30)
- Correspondence (43 / 46)**
- Correspondence (3 / 4)
- 06-Feb-2024 Adhoc Letter Dorset County Hospital NHS Four
- 14-Jul-2023 Adhoc Letter Dorset County Hospital NHS Founda
- 14-Jul-2023 Adhoc Letter Dorset County Hospital NHS Four
- 31-Aug-2021 Adhoc Letter Dorset County Hospital NHS Four
- Outpatient Letter (34 / 35)
- 06-Feb-2024 Clinic Letter ANDREW MACKLIN
- 21-Jul-2023 Allergy/Immunology Clinic Lett Bournemouth I
- 11-Jul-2023 Allergy/Immunology Clinic Lett Bournemouth I
- 24-May-2023 Clinic Letter ANDREW MACKLIN
- 04-Apr-2023 Allergy/Immunology Clinic Lett Bournemouth I
- 04-Oct-2022 Medical Clinic Letter Bournemouth Hospital
- 04-Oct-2022 Medical Additional to Patient Bournemouth Hc
- 18-Mar-2022 Clinic Letter ANDREW MACKLIN
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- 07-Feb-2022 01 Zhivko Test Bournemouth Hospital
- 07-Feb-2022 Medical Clinic Letter Bournemouth Hospital
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- 09-Jul-2021 Medical Clinic Letter Bournemouth Hospital
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- 30-Jun-2021 Orthodontic Clinic Letter Bournemouth Hospit

**Dorset County Hospital**  
**Clinical Correspondence**

06/02/2024

Dr Gptest For Clinic Letters  
 Dorset County Hospital  
 Williams Avenue  
 Dorchester  
 Dorset  
 DT1 2JY

Practice Code: TEST (Letter sent to GP Practice on approval)

Dear Dr Gptest For Clinic Letters

**Patient Name:** Mr Trevor Champion D.O.B 04/05/1967

**Address:** Dorset County Hospital, Williams Avenue, Dorchester, Dorset, DT1 2JY

**Hospital No:** D803189

**NHS Number:** 491 167 7333

Testing DCR.

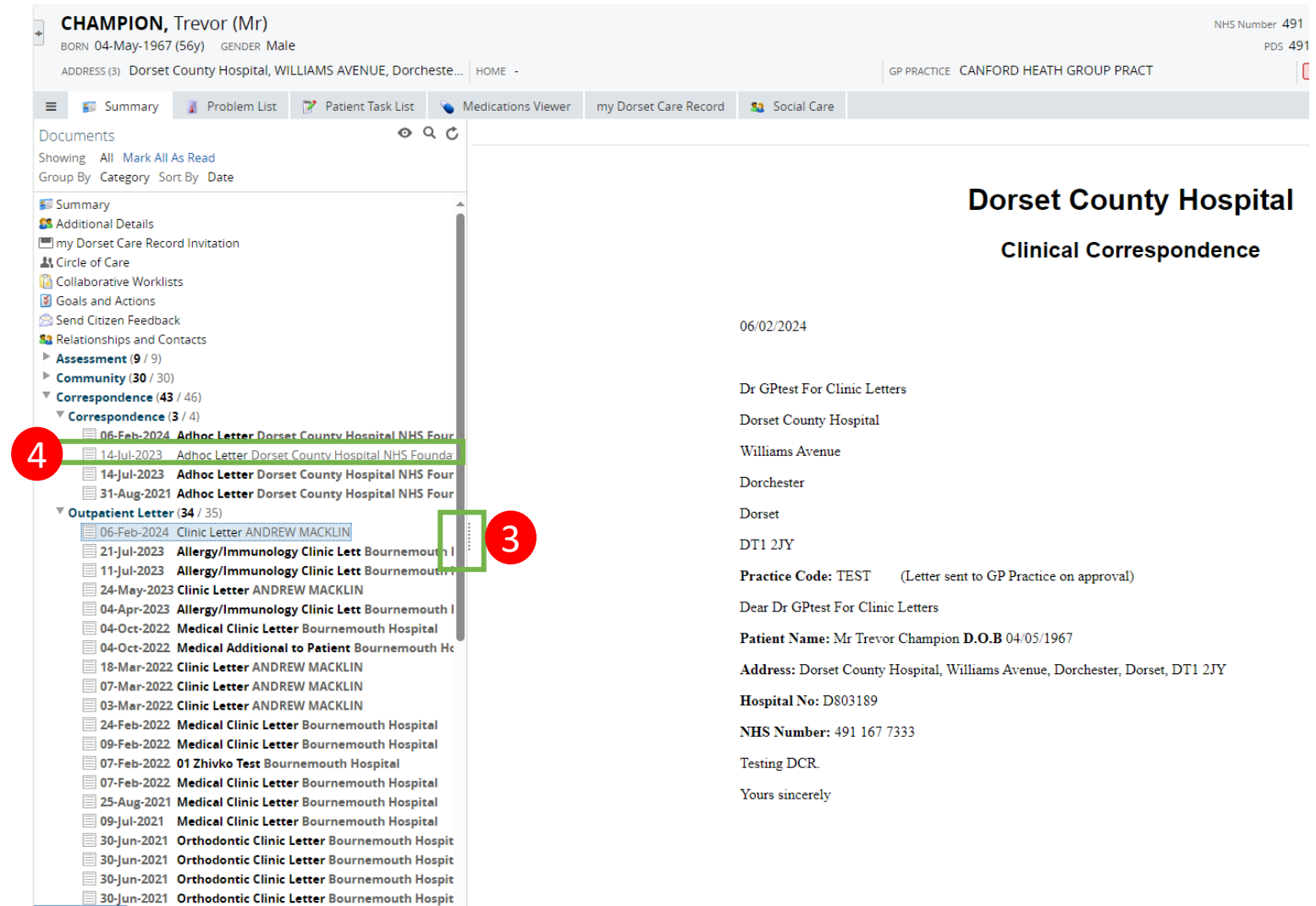
Yours sincerely

# 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 title 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 screenshot displays the Dorset Care Record interface for a patient named Trevor Champion. The left-hand side shows a 'Documents' tree with categories like Summary, Assessment, Community, and Correspondence. A red circle '4' highlights the 'Correspondence' folder, and a red circle '3' highlights a dotted line used to adjust the width of the tree. The right-hand side shows a selected document titled 'Dorset County Hospital Clinical Correspondence' dated 06/02/2024. The document content includes patient details, practice information, and a letter addressed to Dr. GPtest For Clinic Letters.

**CHAMPION, Trevor (Mr)** NHS Number 491  
BORN 04-May-1967 (56y) GENDER Male PDS 491  
ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorche... HOME - GP PRACTICE CANFORD HEATH GROUP PRACT

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

- Summary
- Additional Details
- my Dorset Care Record Invitation
- Circle of Care
- Collaborative Worklists
- Goals and Actions
- Send Citizen Feedback
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- Assessment (9 / 9)
- Community (30 / 30)
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    - 06-Feb-2024 Adhoc Letter Dorset County Hospital NHS Four
    - 14-Jul-2023 Adhoc Letter Dorset County Hospital NHS Founda
    - 14-Jul-2023 Adhoc Letter Dorset County Hospital NHS Four
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    - 30-Jun-2021 Orthodontic Clinic Letter Bournemouth Hospit

**Dorset County Hospital**  
**Clinical Correspondence**

06/02/2024

Dr GPtest For Clinic Letters  
Dorset County Hospital  
Williams Avenue  
Dorchester  
Dorset  
DT1 2JY

Practice Code: TEST (Letter sent to GP Practice on approval)

Dear Dr GPtest For Clinic Letters

Patient Name: Mr Trevor Champion D.O.B 04/05/1967

Address: Dorset County Hospital, Williams Avenue, Dorchester, Dorset, DT1 2JY

Hospital No: D803189

NHS Number: 491 167 7333

Testing DCR.

Yours sincerely

# 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	<ul style="list-style-type: none"> <li>Pre-op Assessment</li> <li>Social services assessment</li> </ul>	<ul style="list-style-type: none"> <li>DCH</li> <li>DC</li> </ul>	<ul style="list-style-type: none"> <li>DCH myPreOp Assessment</li> <li>DC social services AMHP report</li> </ul>
Care Plans	<ul style="list-style-type: none"> <li>MDT Plan</li> </ul>	<ul style="list-style-type: none"> <li>DCH</li> </ul>	<ul style="list-style-type: none"> <li>MDT Outcome from SCR Oncology Multidisciplinary Team (MDT)</li> </ul>
Clinical Notes	<ul style="list-style-type: none"> <li>Medical note (pending)</li> <li>Summary record</li> <li>Infection control (pending)</li> <li>Obstetrics</li> </ul>	<ul style="list-style-type: none"> <li>DCH</li> </ul>	<ul style="list-style-type: none"> <li>Ophthalmology (mediSight)</li> <li>SCR Summary Oncology MDT Record</li> <li>ICNet clinical note</li> <li>Badgernet Maternity Obstetrics</li> </ul>
Correspondence	<ul style="list-style-type: none"> <li>Correspondence (DCH and DHC)</li> <li>Outpatient letter (UHD, DCH and DHC)</li> <li>Unscheduled care (UHD and DCH)</li> <li>Discharge letter for inpatients (UHD, DCH and DHC)</li> <li>Referral letter (pending) (DCH)</li> <li>Letter to patient (DCH)</li> </ul>	<ul style="list-style-type: none"> <li>UHD</li> <li>DCH</li> <li>DHC</li> </ul>	<ul style="list-style-type: none"> <li>DCH Ad-hoc Letters from PAS. DHC additional data (appointments and documents) following a Coroner's report.</li> <li>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.</li> <li>ED discharge letter</li> <li>UHD letter includes day case. DCH many specialties letter (ICE). DHC additional data (appointments and documents) following a Coroner's report</li> <li>DCH Ophthalmology (mediSight)</li> <li>DCH SCR Patient Letter Oncology (Somerset RMS)</li> </ul>
Reports	<ul style="list-style-type: none"> <li>ECG</li> <li>Cardiac investigation</li> <li>Echo</li> <li>Ambulatory BP monitoring</li> <li>Endoscopy Report</li> </ul>	<ul style="list-style-type: none"> <li>DCH</li> </ul>	<ul style="list-style-type: none"> <li>Cardiology (PRISM)</li> <li>Cardiology (PRISM)</li> <li>Cardiology (PRISM)</li> <li>Cardiology (PRISM)</li> <li>Endoscopy</li> </ul>

*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.

**CHAMPION, Trevor (Mr)**  
 BORN 04-May-1967 (56y) GENDER Male  
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste... | HOME -

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

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Documents 👁️ 🔍 ↻

Showing All [Mark All As Read](#)

Group By [Category](#) Sort By [Date](#)

- Summary
- Additional Details
- my Dorset Care Record Invitation
- Circle of Care
- Collaborative Worklists
- Goals and Actions
- Send Citizen Feedback
- Relationships and Contacts
- ▶ **Assessment (9 / 9)**
- ▶ **Community (30 / 30)**
- ▼ **Correspondence (44 / 46)**
- ▶ Correspondence (3 / 4)
- ▶ Outpatient Letter (35 / 35)
- ▶ Unscheduled Care (6 / 7)
- ▶ Primary Care (20 / 20)

### Current Activity Snapshot 🗄️

Start Date	Type	Facility	Location	Practitioner (Team)
Wed, 01-Sep-2021, 16:28	Emergency	Poole General Hospital	Emergency Department	-
Mon, 21-Mar-2022, 10:00	Acute Inpatient	Poole General Hospital	C2 Ward - POOLE	MR A I SKENE
Wed, 07-Feb-2024, 11:44	Acute Inpatient	Dorset County Hospital	CARDIAC CARE WARD	Dr TIM EDWARD

### Active Alerts 🗄️

Recorded On/Onset Date	Alert (Classification)
<div style="border: 1px solid #007bff; background-color: #e6f2ff; display: inline-block; padding: 5px;"> <span style="font-size: 1.2em; color: #007bff;">i</span> Please check the Summary tab for Primary folders         </div>	



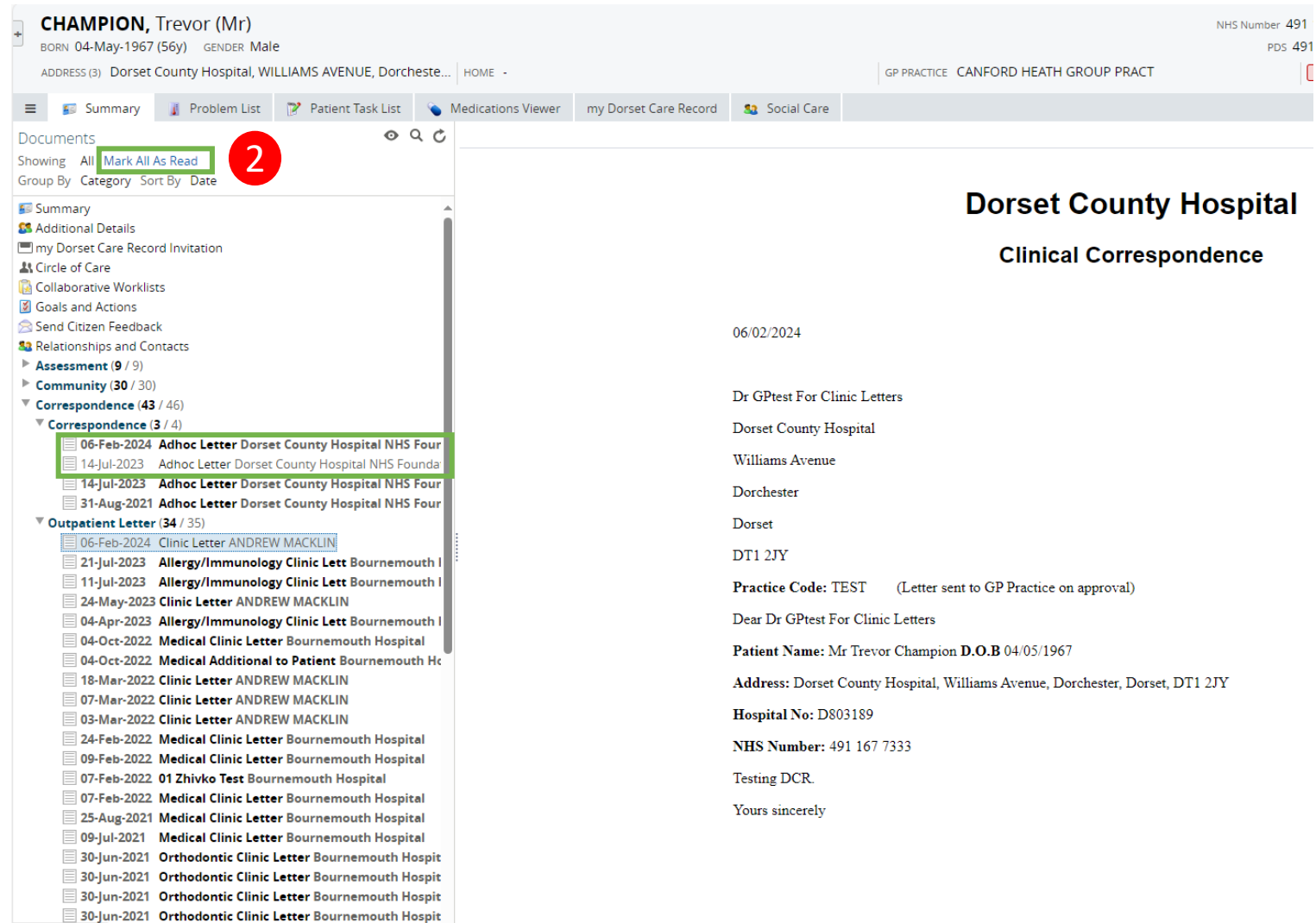
# Read documents show in normal text

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**.



**CHAMPION, Trevor (Mr)** NHS Number 491  
 BORN 04-May-1967 (56y) GENDER Male PDS 491  
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorche... HOME - GP PRACTICE CANFORD HEATH GROUP PRACT

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

Documents 2  
 Showing All **Mark All As Read**  
 Group By Category Sort By Date

Summary  
 Additional Details  
 my Dorset Care Record Invitation  
 Circle of Care  
 Collaborative Worklists  
 Goals and Actions  
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 09-Jul-2021 Medical Clinic Letter Bournemouth Hospital  
 30-Jun-2021 Orthodontic Clinic Letter Bournemouth Hospit  
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 30-Jun-2021 Orthodontic Clinic Letter Bournemouth Hospit  
 30-Jun-2021 Orthodontic Clinic Letter Bournemouth Hospit

**Dorset County Hospital**  
**Clinical Correspondence**

06/02/2024

Dr G Ptest For Clinic Letters  
 Dorset County Hospital  
 Williams Avenue  
 Dorchester  
 Dorset  
 DT1 2JY

Practice Code: TEST (Letter sent to GP Practice on approval)

Dear Dr G Ptest For Clinic Letters

Patient Name: Mr Trevor Champion D.O.B 04/05/1967

Address: Dorset County Hospital, Williams Avenue, Dorchester, Dorset, DT1 2JY

Hospital No: D803189  
 NHS Number: 491 167 7333  
 Testing DCR.

Yours sincerely

# 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.

The screenshot displays the Dorset Care Record interface for a patient named Trevor (Mr) CHAMPION, born 04-May-1967 (56y), male. The interface includes a navigation bar with tabs for Summary, Problem List, Patient Task List, Medications Viewer, my Dorset Care Record, and Social Care. The main content area shows a list of documents under the 'Documents' section, with a 'Summary' tab selected. A lightbox is open over a document titled 'Adhoc Letter Dorset County Hospital NHS Found...', showing its metadata. A green arrow points to the 'Mark As' section at the bottom of the lightbox, where 'Read' is selected and 'Unread' is also visible.

Start Date	Type	Facility	Location	Practiti (Team)
Wed, 01-Sep-2021, 16:28	Emergency	Poole General Hospital	Emergency Department	-
Mon, 21-Mar-2022, 10:00	Acute Inpatient	Poole General Hospital	C2 Ward - POOLE	MR A I
Wed, 07-Feb-2024, 11:44	Acute Inpatient	Dorset County Hospital	CARDIAC CARE WARD	Dr TIM EDWAR

Recorded On/Onset Date	Alert (Classification)
<b>Adhoc Letter</b>	
Date	14-Jul-2023
Category	Correspondence
Service	unknown
Requested By	Dorset County Hospital NHS Foundation Trust
classCode	Correspondence
Creation Time	14-Jul-2023
Document ID	2.16.840.1.113883.2.1.3.60.1.30.2.4.1689340236.49.134315
Report ID	2.16.840.1.113883.2.1.3.60.1.30.2.4.1689340236.49
Service Start Time	14-Jul-2023
Service Stop Time	14-Jul-2023
Site	Dorset County Hospital NHS Foundation Trust
Status	Approved
typeCode	Correspondence
Mark As	Read   Unread

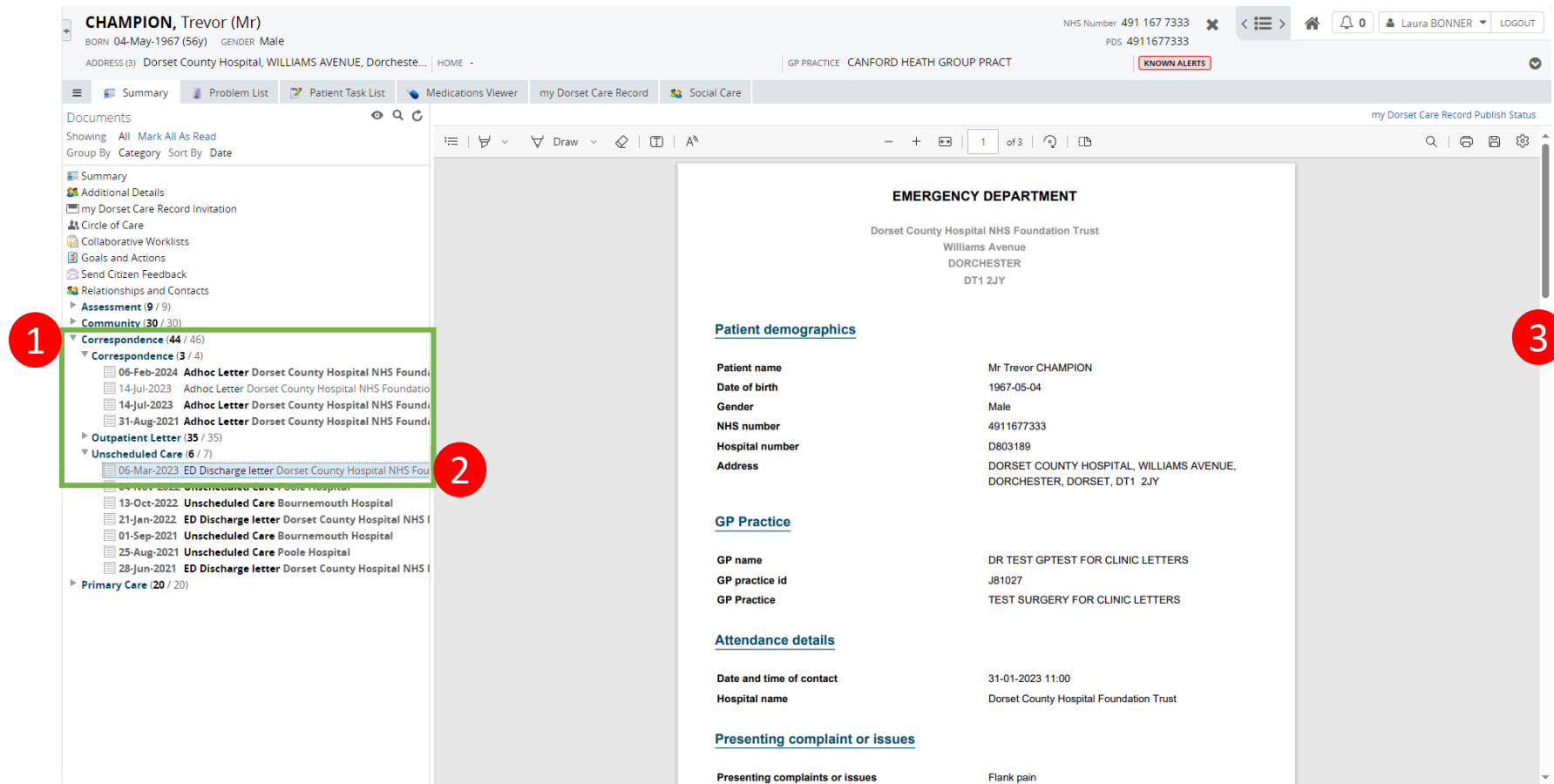
# Lightbox definitions

Adhoc Letter	
Date	14-Jul-2023
Category	Correspondence
Service	unknown
Requested By	Dorset County Hospital NHS Foundation Trust
classCode	Correspondence
Creation Time	14-Jul-2023
Document ID	2.16.840.1.113883.2.1.3.60.1.30.2.4.1689340236.49.134315
Report ID	2.16.840.1.113883.2.1.3.60.1.30.2.4.1689340236.49
Service Start Time	14-Jul-2023
Service Stop Time	14-Jul-2023
Site	Dorset County Hospital NHS Foundation Trust
Status	Approved
typeCode	Correspondence
Mark As	Read   Unread

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.



The screenshot shows the Dorset Care Record interface for a patient named Trevor CHAMPION. The left sidebar contains a 'Documents' tree with categories like Summary, Assessment, and Correspondence. The 'Correspondence' category is expanded, and a document titled '06-Mar-2023 ED Discharge letter Dorset County Hospital NHS Found...' is selected. The main content area displays the document details, including patient demographics, GP practice information, and attendance details.

**EMERGENCY DEPARTMENT**  
Dorset County Hospital NHS Foundation Trust  
Williams Avenue  
DORCHESTER  
DT1 2JY

**Patient demographics**

Patient name	Mr Trevor CHAMPION
Date of birth	1967-05-04
Gender	Male
NHS number	4911677333
Hospital number	D803189
Address	DORSET COUNTY HOSPITAL, WILLIAMS AVENUE, DORCHESTER, DORSET, DT1 2JY

**GP Practice**

GP name	DR TEST GPTEST FOR CLINIC LETTERS
GP practice id	J81027
GP Practice	TEST SURGERY FOR CLINIC LETTERS

**Attendance details**

Date and time of contact	31-01-2023 11:00
Hospital name	Dorset County Hospital Foundation Trust

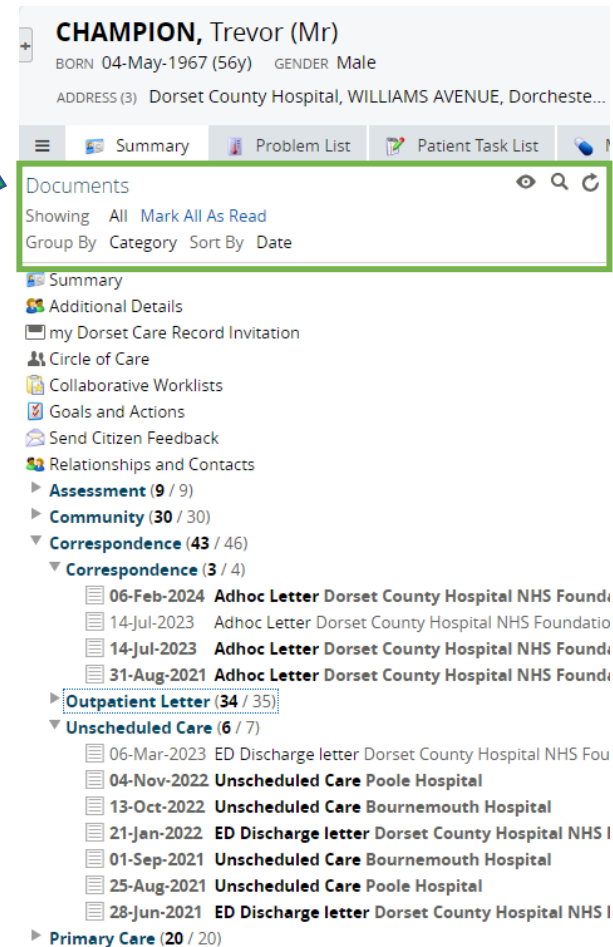
**Presenting complaint or issues**

Presenting complaints or issues	Flank pain
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# 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.



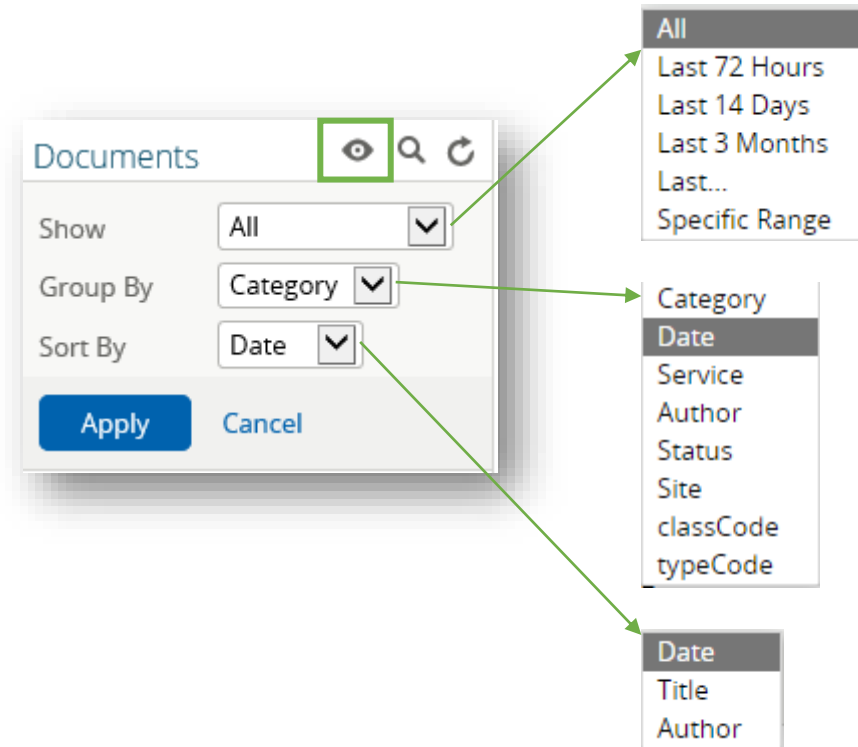
The screenshot displays the patient record for Trevor Champion (Mr), born 04-May-1967 (56y), male, residing at Dorset County Hospital, WILLIAMS AVENUE, Dorchester. The interface includes tabs for Summary, Problem List, and Patient Task List. A 'Documents' section is highlighted with a green box, showing options to 'Showing All', 'Mark All As Read', and 'Group By Category' and 'Sort By Date'. Below this, a list of document categories is shown, including Assessment (9 / 9), Community (30 / 30), Correspondence (43 / 46), Outpatient Letter (34 / 35), and Unscheduled Care (6 / 7). The 'Correspondence' category is expanded, showing a list of documents with dates and titles, such as '06-Feb-2024 Adhoc Letter Dorset County Hospital NHS Foundi' and '14-Jul-2023 Adhoc Letter Dorset County Hospital NHS Foundatio'.

# 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.

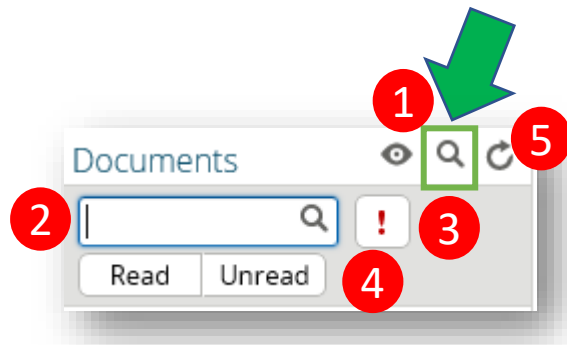



# Use magnifying glass to Search

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.