



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**

Documents in the DCR



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

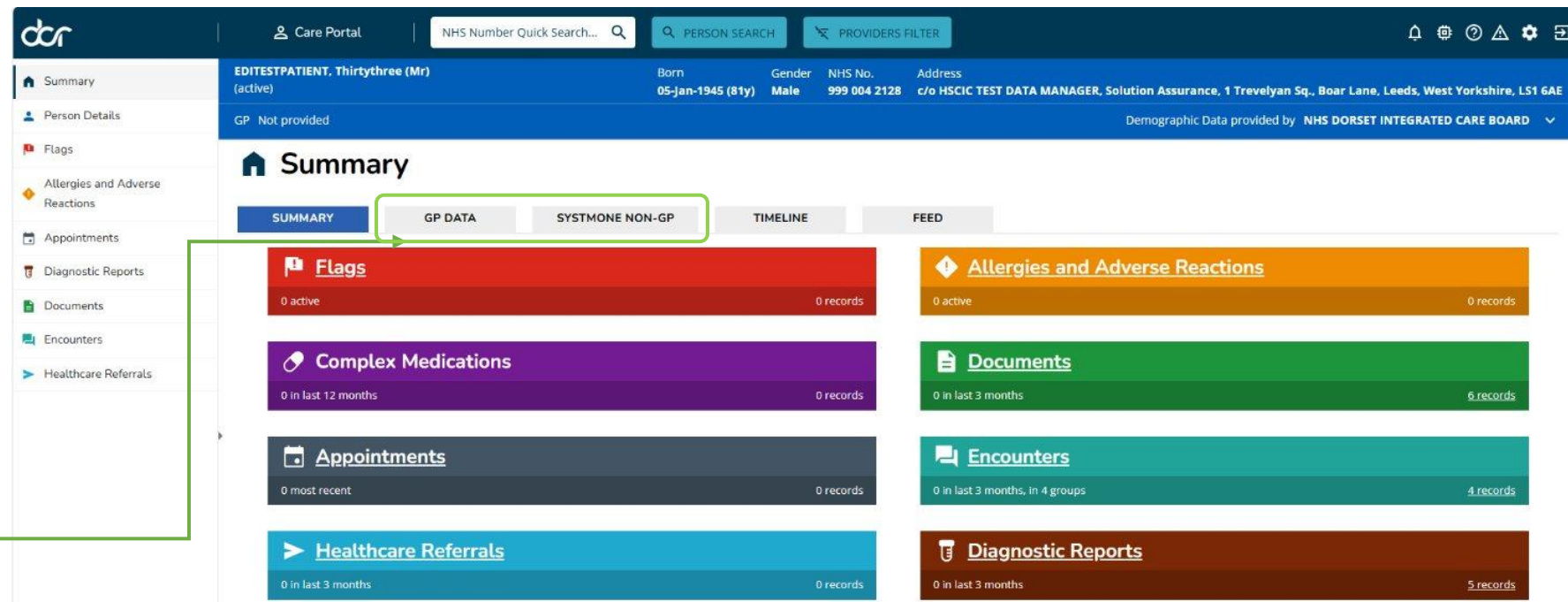
Documents in the DCR

The **DCR partner organisations** providing **Documents** (specialties letters, correspondence, clinical notes, reports, care plans, assessments, images etc. for inpatients, outpatients and unscheduled care) in the DCR are:

- Dorset County Hospital (Discharge Letters and Summaries)
- University Hospitals Dorset (Inpatient Discharge Summaries)
- Dorset Council (Approved Mental Health Assessments - AMHP)
- Dorset HealthCare - Mental Health

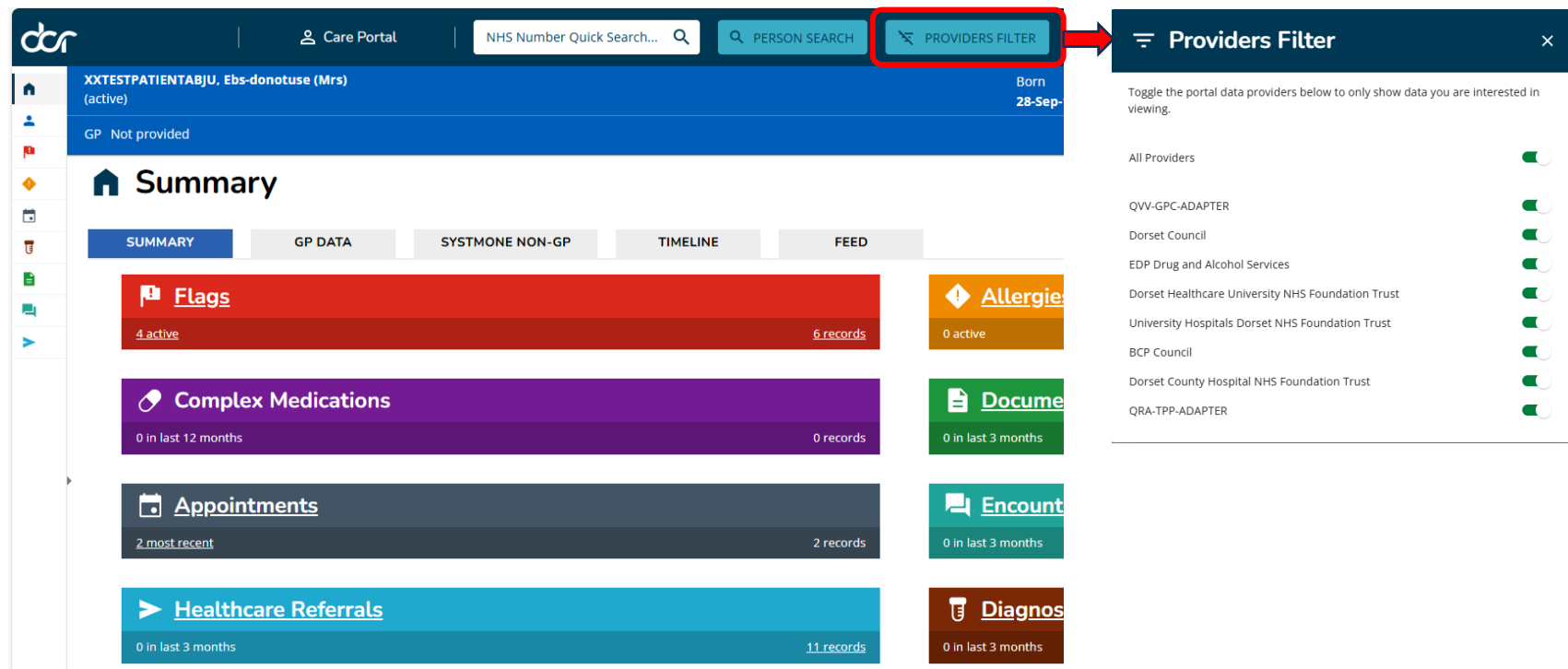
All provider data, except for the GP and DHC Community data, is presented together under the categories available in the DCR e.g. Flags, Allergies and adverse reactions, Appointments etc.

The GP and DHC Community are the exception to this, with the data from these organisations only available under the GP Data and SystemOne Non-GP tabs.



You can select the providers you would like to see Documents data from

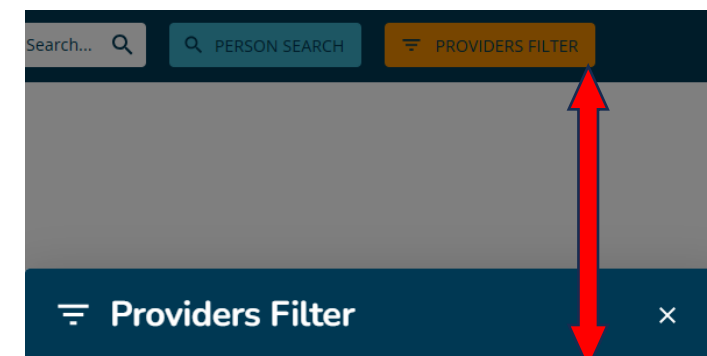
1 The **Providers Filter**  displays all the data provider organisations sending data in the DCR for a particular record.



The screenshot shows the DCR interface for a patient record. The top navigation bar includes the DCR logo, 'Care Portal', a search bar, and buttons for 'PERSON SEARCH' and 'PROVIDERS FILTER'. The 'PROVIDERS FILTER' button is highlighted with a red box and an arrow pointing to a detailed view of the filter. The main content area shows a patient summary for 'XXTESTPATIENTABJU, Ebs-donotuse (Mrs)' with tabs for Summary, GP Data, SYSTMONE NON-GP, Timeline, and Feed. The Summary tab is active, showing various data points like Flags, Complex Medications, Appointments, Healthcare Referrals, Allergies, Documents, Encounters, and Diagnoses.

2 De-select/toggle providers to only see the data from the providers of interest. When only some providers are selected, the **Providers Filter** button changes colour from **turquoise** to **orange/amber** to alert you that you are seeing a restricted view of the data available for this record.

Please note the **Provider Filter** resets automatically to **All Providers** when you enter a new record.



The screenshot shows the 'Providers Filter' panel. It has a search bar, 'PERSON SEARCH', and 'PROVIDERS FILTER' buttons. Below is a list of providers with toggle switches: All Providers, QVV-GPC-ADAPTER, Dorset Council, EDP Drug and Alcohol Services, Dorset Healthcare University NHS Foundation Trust, University Hospitals Dorset NHS Foundation Trust, BCP Council, Dorset County Hospital NHS Foundation Trust, and QRA-TPP-ADAPTER. A red arrow points from the 'PROVIDERS FILTER' button in the top navigation bar to this panel.

Toggle the portal data providers below to only show data you are interested in viewing.

All Providers
QVV-GPC-ADAPTER
Dorset Council
EDP Drug and Alcohol Services
Dorset Healthcare University NHS Foundation Trust
University Hospitals Dorset NHS Foundation Trust
BCP Council
Dorset County Hospital NHS Foundation Trust
QRA-TPP-ADAPTER

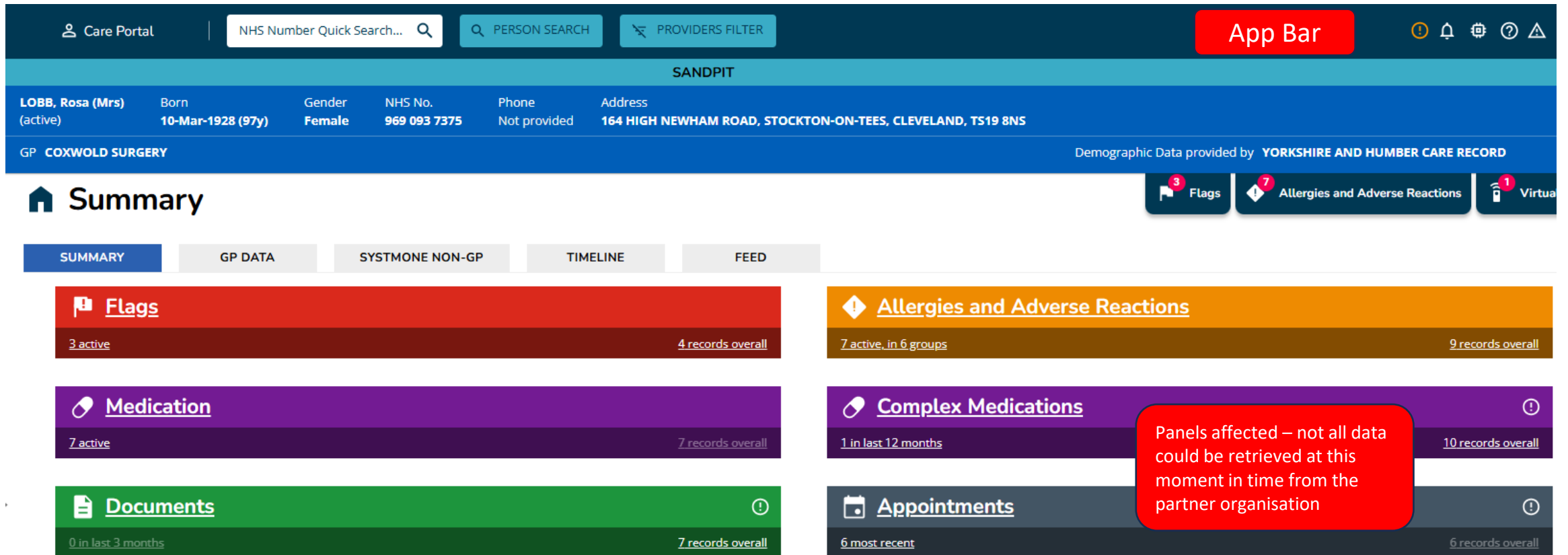


Error warning when data cannot be retrieved from the provider organisations

The DCR retrieves data in real time from provider organisations; the DCR does not store any data.

When a provider's data cannot be retrieved, the DCR displays an error warning indicator: . This can be seen at the top of the DCR screen in the App Bar and in the individual panels affected.

Clicking on the error icon will let you know what data is missing.



The screenshot displays the DCR interface for a patient named LOBB, Rosa (Mrs). The top navigation bar includes a search bar, 'PERSON SEARCH', 'PROVIDERS FILTER', and an 'App Bar' with a yellow error warning icon. The patient's demographic information is shown below the search bar. The main content area is titled 'Summary' and features a tabbed interface with 'SUMMARY', 'GP DATA', 'SYSTEMONE NON-GP', 'TIMELINE', and 'FEED'. The 'SUMMARY' tab is active, showing six panels: 'Flags' (3 active, 4 records overall), 'Allergies and Adverse Reactions' (7 active, in 6 groups, 9 records overall), 'Medication' (7 active, 7 records overall), 'Complex Medications' (1 in last 12 months, 10 records overall), 'Documents' (0 in last 3 months, 7 records overall), and 'Appointments' (6 most recent, 6 records overall). A red callout box highlights the error warning icon in the 'Complex Medications' and 'Appointments' panels, stating: 'Panels affected – not all data could be retrieved at this moment in time from the partner organisation'.

Care Portal | NHS Number Quick Search... | PERSON SEARCH | PROVIDERS FILTER | App Bar

SANDPIT

LOBB, Rosa (Mrs) (active) Born 10-Mar-1928 (97y) Gender Female NHS No. 969 093 7375 Phone Not provided Address 164 HIGH NEWHAM ROAD, STOCKTON-ON-TEES, CLEVELAND, TS19 8NS

GP COXWOLD SURGERY Demographic Data provided by YORKSHIRE AND HUMBER CARE RECORD

Summary

Flags 3 active 4 records overall

Allergies and Adverse Reactions 7 active, in 6 groups 9 records overall

Medication 7 active 7 records overall

Complex Medications 1 in last 12 months 10 records overall

Documents 0 in last 3 months 7 records overall

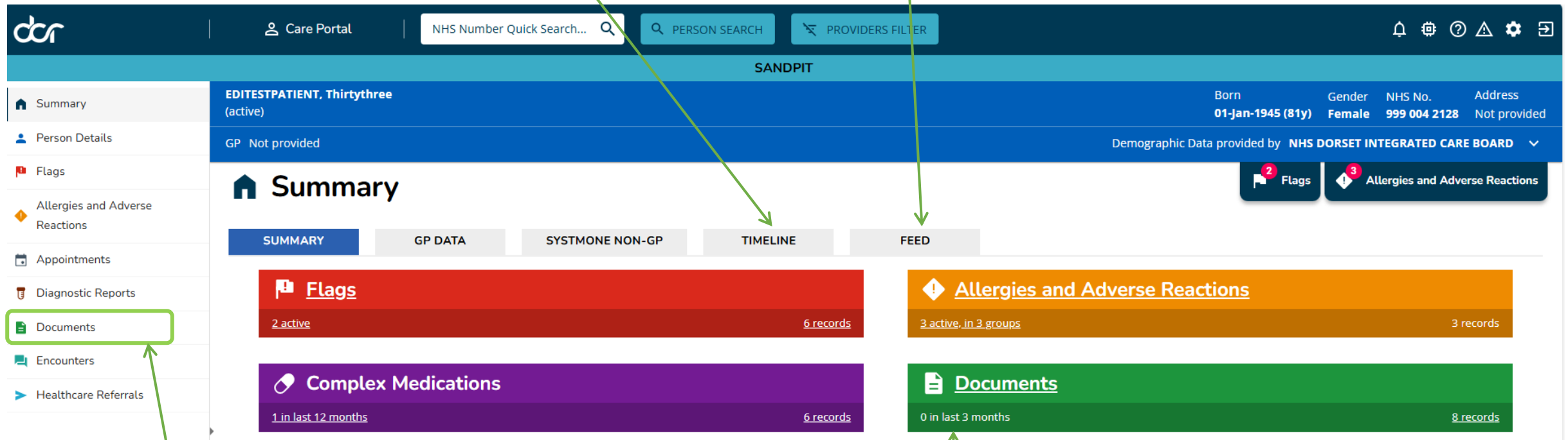
Appointments 6 most recent 6 records overall

Panels affected – not all data could be retrieved at this moment in time from the partner organisation

Where to find the Documents in the DCR

3. Use the Timeline tab for a horizontal view of a person's data. It's helpful for identifying patterns.

4. Use the Feed tab for a vertical chronological view of a person's data



The screenshot shows the DCR interface for a patient named EDITESTPATIENT, Thirtythree (active). The interface includes a top navigation bar with a search bar and filters, a left sidebar with navigation links, and a main content area with tabs for Summary, GP DATA, SYSTMONE NON-GP, TIMELINE, and FEED. The Summary tab is active, showing panels for Flags, Allergies and Adverse Reactions, Complex Medications, and Documents. The Documents panel is highlighted with a green box and an arrow pointing to it from the sidebar. The TIMELINE and FEED tabs are also highlighted with arrows pointing to them from the top navigation bar.

Summary Tab:

- Flags:** 2 active, 6 records
- Allergies and Adverse Reactions:** 3 active, in 3 groups, 3 records
- Complex Medications:** 1 in last 12 months, 6 records
- Documents:** 0 in last 3 months, 8 records

1. Sidebar: Panel headers

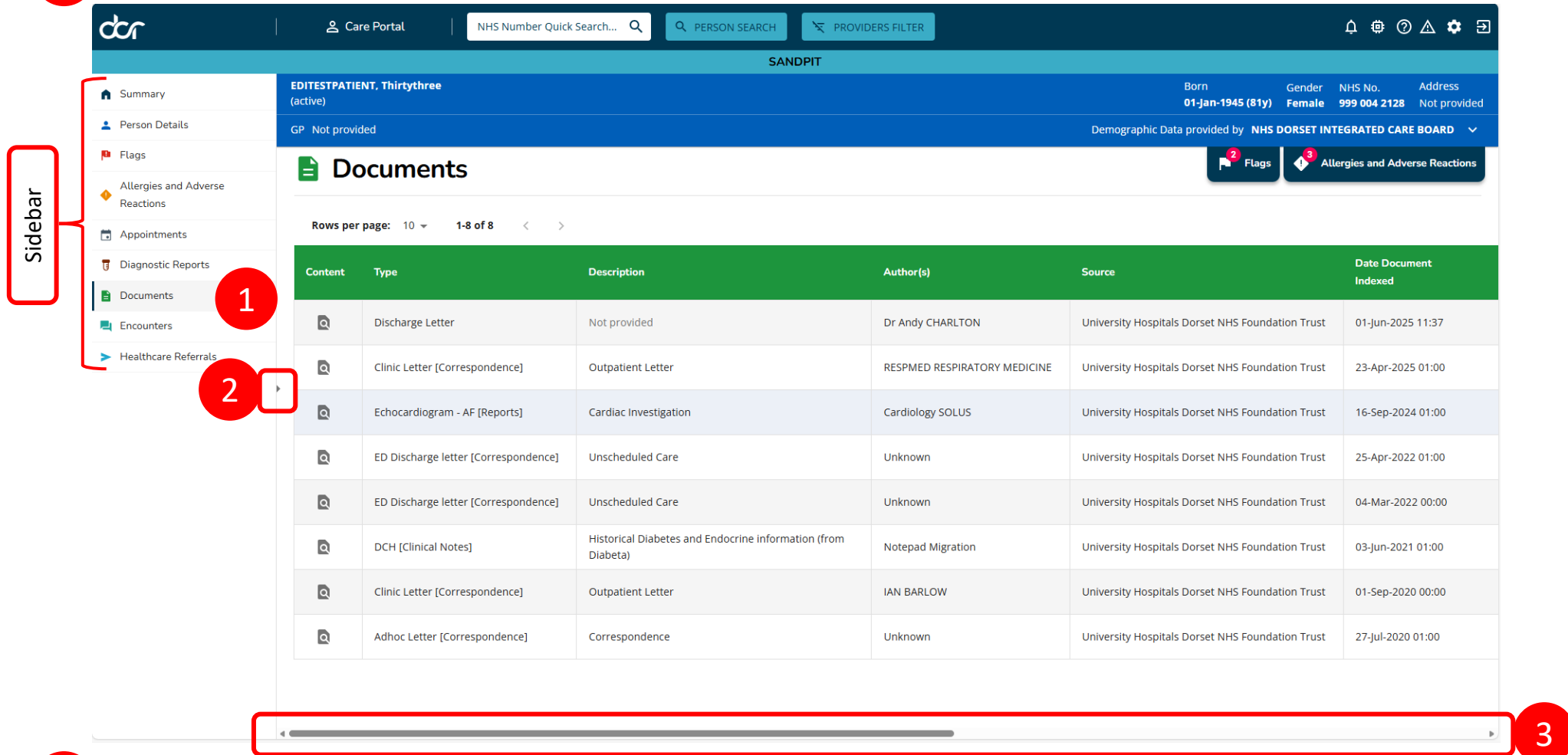
Click on panel header to see the documents in a table.

2. Summary tab: Documents panel

Click on the underlined panel name to see the documents in a table or filter underneath by documents from the last 3 months or overall.

1. Sidebar panel header: A table view

1 Click on **Documents** in the Sidebar to see a table view of the documents in the DCR.



The screenshot shows the DCR interface for a patient named EDITESTPATIENT, Thirtythree (active). The sidebar on the left contains links to Summary, Person Details, Flags, Allergies and Adverse Reactions, Appointments, Diagnostic Reports, Documents, Encounters, and Healthcare Referrals. The 'Documents' link is highlighted with a red circle and the number 1. A red circle with the number 2 points to a right-pointing arrow icon in the sidebar. The main content area displays a table of documents with the following columns: Content, Type, Description, Author(s), Source, and Date Document Indexed. The table contains 8 rows of data. A red circle with the number 3 points to a horizontal scrollbar at the bottom of the table.

Content	Type	Description	Author(s)	Source	Date Document Indexed
Discharge Letter		Not provided	Dr Andy CHARLTON	University Hospitals Dorset NHS Foundation Trust	01-Jun-2025 11:37
Clinic Letter [Correspondence]		Outpatient Letter	RESPMED RESPIRATORY MEDICINE	University Hospitals Dorset NHS Foundation Trust	23-Apr-2025 01:00
Echocardiogram - AF [Reports]		Cardiac Investigation	Cardiology SOLUS	University Hospitals Dorset NHS Foundation Trust	16-Sep-2024 01:00
ED Discharge letter [Correspondence]		Unscheduled Care	Unknown	University Hospitals Dorset NHS Foundation Trust	25-Apr-2022 01:00
ED Discharge letter [Correspondence]		Unscheduled Care	Unknown	University Hospitals Dorset NHS Foundation Trust	04-Mar-2022 00:00
DCH [Clinical Notes]		Historical Diabetes and Endocrine information (from Diabeta)	Notepad Migration	University Hospitals Dorset NHS Foundation Trust	03-Jun-2021 01:00
Clinic Letter [Correspondence]		Outpatient Letter	IAN BARLOW	University Hospitals Dorset NHS Foundation Trust	01-Sep-2020 00:00
Adhoc Letter [Correspondence]		Correspondence	Unknown	University Hospitals Dorset NHS Foundation Trust	27-Jul-2020 01:00

2 Use the arrow to collapse the **Sidebar** and have a better/enlarged view of the right side of the screen.

3 The table is quite wide, and you need to scroll to see the rest of it (please see next slide for the second half of the table).

Second half of the documents table

Reference Status	Document Status	Context - Encounter	Context - Period	Class	Context - Event	Context - Facility Type	Context - Practice Setting
Current	Final	Not provided	Not provided	Not provided	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Correspondence	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Reports	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Correspondence	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Correspondence	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Clinical Notes	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Correspondence	Not provided	Not provided	Not provided
Current	Final	Not provided	Not provided	Correspondence	Not provided	Not provided	Not provided

Sorting the table

Side bar collapsed/slimline

EDITESTPATIENT, Thirtythree
(active)

Born 01-Jan-1945 (81y) Gender Female NHS No. 999 004 2128 Address Not provided

GP Not provided

Demographic Data provided by NHS DORSET INTEGRATED CARE BOARD

Documents

Flags Allergies and Adverse Reactions

Rows per page: 10 1-8 of 8

Content	Type	Description	Author(s)	Source	Date Document Indexed	Reference Status	D
Adhoc Letter [Correspondence]	Correspondence		Unknown	University Hospitals Dorset NHS Foundation Trust	27-Jul-2020 01:00	Current	Fi
Clinic Letter [Correspondence]	Outpatient Letter		IAN BARLOW	University Hospitals Dorset NHS Foundation Trust	01-Sep-2020 00:00	Current	Fi
DCH [Clinical Notes]	Historical Diabetes and Endocrine information (from Diabeta)		Notepad Migration	University Hospitals Dorset NHS Foundation Trust	03-Jun-2021 01:00	Current	Fi
ED Discharge letter [Correspondence]	Unscheduled Care		Unknown	University Hospitals Dorset NHS Foundation Trust	04-Mar-2022 00:00	Current	Fi
ED Discharge letter [Correspondence]	Unscheduled Care		Unknown	University Hospitals Dorset NHS Foundation Trust	25-Apr-2022 01:00	Current	Fi
Echocardiogram - AF [Reports]	Cardiac Investigation		Cardiology SOLUS	University Hospitals Dorset NHS Foundation Trust	16-Sep-2024 01:00	Current	Fi
Clinic Letter [Correspondence]	Outpatient Letter		RESPMED RESPIRATORY MEDICINE	University Hospitals Dorset NHS Foundation Trust	23-Apr-2025 01:00	Current	Fi
Discharge Letter	Not provided		Dr Andy CHARLTON	University Hospitals Dorset NHS Foundation Trust	01-Jun-2025 11:37	Current	Fi

- 4 You can adjust the number of rows to see on a page by clicking on the drop-down arrow next to 10 and selecting either 5,10 or 25. Use the left and right arrows to move between pages.
- 5 The table shows the data entries sorted by most recent i.e. **Date Document Indexed**. This can be reversed as needed, and as outlined before, the Providers Filter can also be used to filter by Provider.

A lightbox view for each document in the table



6 Click on a line in the table and the panel entry lightbox view will pop-up.

GP Not provided

Documents

Rows per page: 10 1-8 of 8

Content	Type
	Adhoc Letter [Correspondence]
	Clinic Letter [Correspondence]
	DCH [Clinical Notes]
	ED Discharge letter [Correspondence]
	ED Discharge letter [Correspondence]
	Echocardiogram - AF [Reports]
	Clinic Letter [Correspondence]
	Discharge Letter

Document

Type: Discharge Letter

Description: Not provided

Author(s): Dr Andy CHARLTON

Source: University Hospitals Dorset NHS Foundation Trust

Date Document Indexed: 01-Jun-2025 11:37

Reference Status: Current

Document Status: Final

Context - Encounter: Not provided

Context - Period: Not provided

Class: Not provided

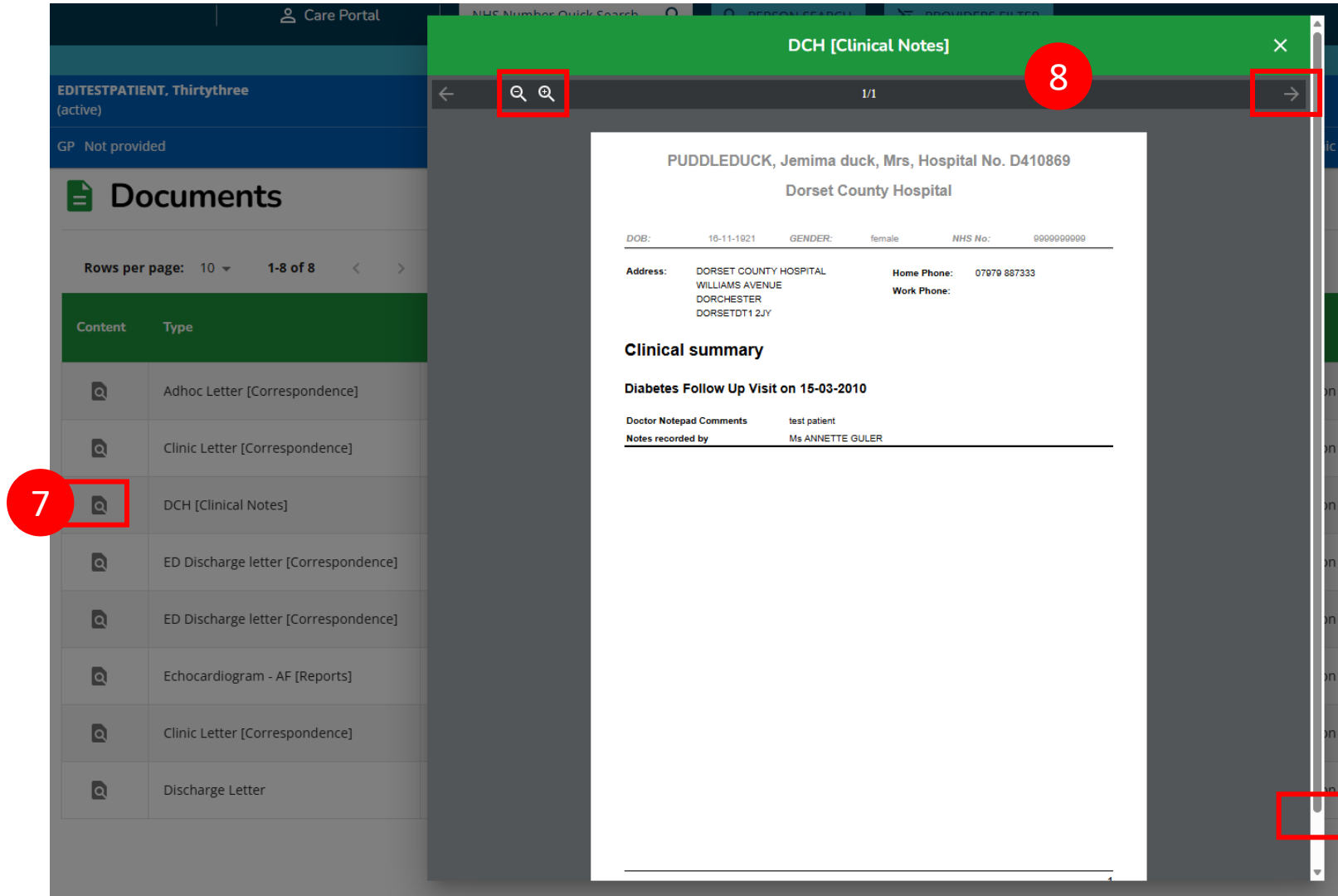
Context - Event: Not provided

Context - Facility Type: Not provided

Context - Practice Setting: Not provided

How to open a document

- 7 Click on the magnifying glass icon to open the document.
- 8 From the document header, where available, use the arrows to turn pages in the document. You can zoom in and out and scroll up and down.



The screenshot displays the Dorset Care Record interface. On the left, the 'Documents' list shows various document types, with 'DCH [Clinical Notes]' highlighted. A red box with the number 7 points to the magnifying glass icon next to this document. On the right, the document preview is shown. A red box with the number 8 points to the zoom in and out icons in the document header. A red box with the number 9 points to the 'x' close button in the top right corner of the document preview.

Documents

Content	Type
Adhoc Letter	[Correspondence]
Clinic Letter	[Correspondence]
DCH	[Clinical Notes]
ED Discharge letter	[Correspondence]
ED Discharge letter	[Correspondence]
Echocardiogram - AF	[Reports]
Clinic Letter	[Correspondence]
Discharge Letter	

DCH [Clinical Notes]

PUDDLEDUCK, Jemima duck, Mrs, Hospital No. D410869
Dorset County Hospital

DOB: 16-11-1921 GENDER: female NHS No: 9999999999

Address: DORSET COUNTY HOSPITAL
WILLIAMS AVENUE
DORCHESTER
DORSETDT1 2JY

Home Phone: 07979 887333
Work Phone:

Clinical summary

Diabetes Follow Up Visit on 15-03-2010

Doctor Notepad Comments test patient
Notes recorded by Ms ANNETTE GULER

- 9 Close the document by clicking on the 'x' in the top right corner, and click on **Summary** in the Sidebar to return to the Summary screen (or click on another **panel header** to navigate to the table view information from that panel).

2. Documents Panel on the Summary screen

ddr

Care Portal

NHS Number Quick Search...

PERSON SEARCH

PROVIDERS FILTER

SANDPIT

EDITESTPATIENT, Thirtythree
(active)

Born 01-Jan-1945 (81y) Gender Female NHS No. 999 004 2128 Address Not provided

GP Not provided

Demographic Data provided by NHS DORSET INTEGRATED CARE BOARD

Summary

GP DATA

SYSTMONE NON-GP

TIMELINE

FEED

Flags

2 active 6 records

Complex Medications

1 in last 12 months 6 records

Allergies and Adverse Reactions

3 active, in 3 groups 3 records

Documents

0 in last 3 months 8 records

Documents

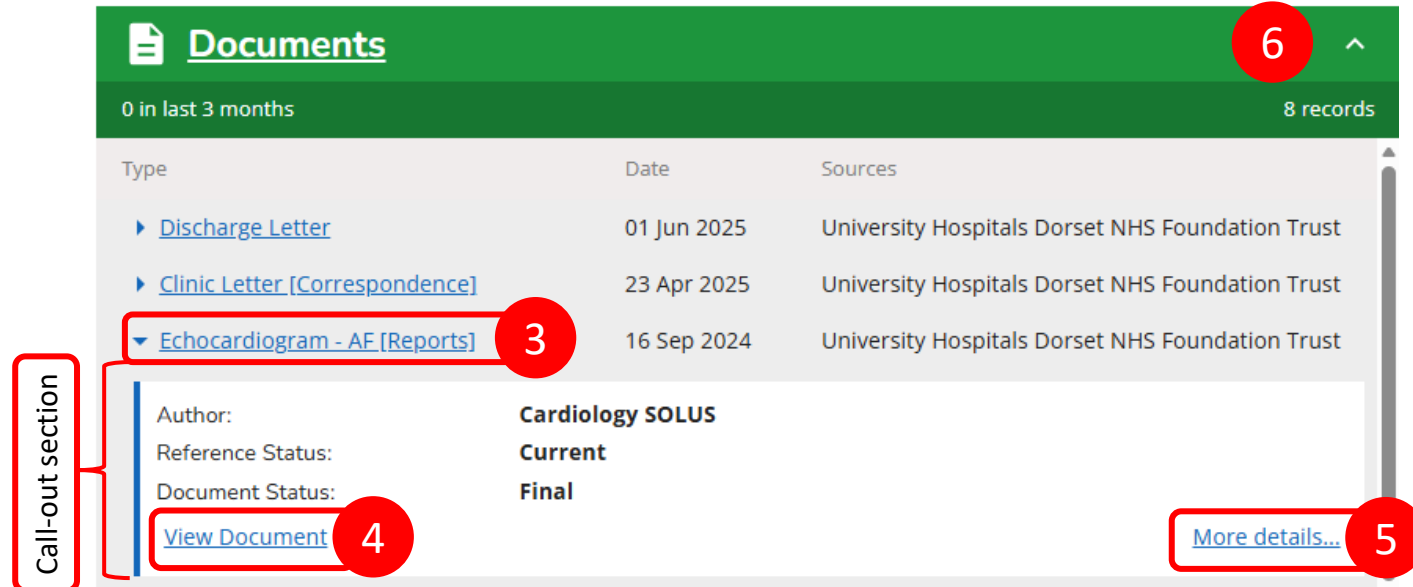
0 in last 3 months 8 records

- 1 Clicking on the panel name takes you to the same table view of information as from the Sidebar panel header.
- 2 Underneath the panel header, click on the number of documents within the last 3 months or overall records.
 - If only the documents from the last 3 months are available to click on, this means that there are no documents older than 3 months.
 - If only the overall documents show, that's because there are no documents from the last 3 months available.

Type	Date	Sources
Discharge Letter	01 Jun 2025	University Hospitals Dorset NHS Foundation Trust
Clinic Letter [Correspondence]	23 Apr 2025	University Hospitals Dorset NHS Foundation Trust
Echocardiogram - AF [Reports]	16 Sep 2024	University Hospitals Dorset NHS Foundation Trust
ED Discharge letter [Correspondence]	25 Apr 2022	University Hospitals Dorset NHS Foundation Trust
ED Discharge letter [Correspondence]	04 Mar 2022	University Hospitals Dorset NHS Foundation Trust
DCH [Clinical Notes]	03 Jun 2021	University Hospitals Dorset NHS Foundation Trust
Clinic Letter [Correspondence]	01 Sep 2020	University Hospitals Dorset NHS Foundation Trust
Adhoc Letter [Correspondence]	27 Jul 2020	University Hospitals Dorset NHS Foundation Trust

Panel information and 'More details' link to lightbox view

- 3 Click on a **blue arrow document** to expand the view and see more detail in the 'call-out' section.
- 4 Click on the **'View Document'** to see the document.
- 5 Click on the **'More details...'** link to display a lightbox view with all the details seen in the table view from the Sidebar panel header.
- 6 To minimise/collapse the panel, click the **up arrow**.



The screenshot shows the 'Documents' panel in the Dorset Care Record system. The panel has a green header with the title 'Documents' and a collapse icon (up arrow) in the top right corner, labeled with a red circle 6. Below the header, it shows '0 in last 3 months' and '8 records'. The main content is a table with columns 'Type', 'Date', and 'Sources'. The table lists three documents: 'Discharge Letter' (01 Jun 2025), 'Clinic Letter [Correspondence]' (23 Apr 2025), and 'Echocardiogram - AF [Reports]' (16 Sep 2024). The 'Echocardiogram - AF [Reports]' row is expanded, showing a 'Call-out section' on the left with details: Author: Cardiology SOLUS, Reference Status: Current, and Document Status: Final. At the bottom of this section is a 'View Document' link, labeled with a red circle 4. To the right of the call-out section is a 'More details...' link, labeled with a red circle 5. A red circle 3 points to the blue arrow icon next to the 'Echocardiogram - AF [Reports]' row. A red circle 6 points to the collapse icon in the top right corner of the panel header.

Type	Date	Sources
▶ Discharge Letter	01 Jun 2025	University Hospitals Dorset NHS Foundation Trust
▶ Clinic Letter [Correspondence]	23 Apr 2025	University Hospitals Dorset NHS Foundation Trust
▼ Echocardiogram - AF [Reports]	16 Sep 2024	University Hospitals Dorset NHS Foundation Trust

Call-out section

Author: Cardiology SOLUS
Reference Status: Current
Document Status: Final

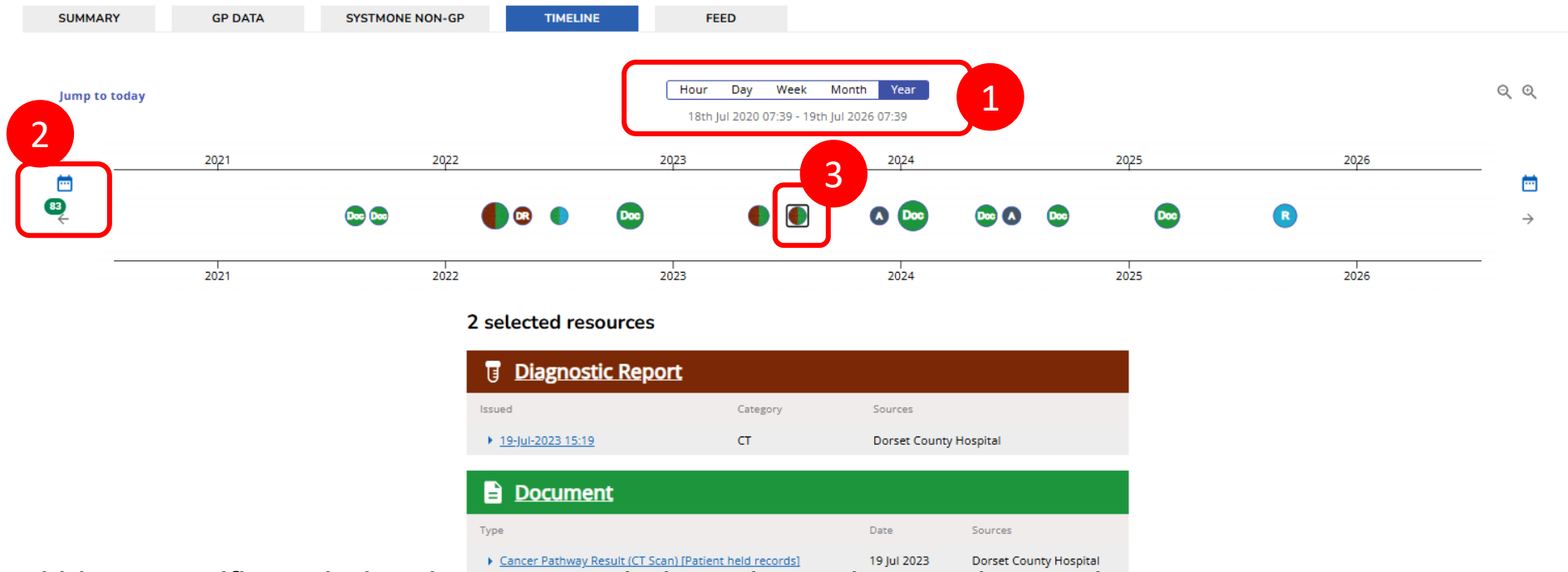
[View Document](#)

[More details...](#)

3. Documents can be seen on the Timeline tab

The **Timeline tab** provides a horizontal view of the data entries/records from all the panels. This display enables you to see where these records occurred relative to one another and may allow you to identify patterns.

The records show as **coloured circles**, where the colour corresponds to the colours used for the panels. The circle also includes initial letters which represent the panel for extra clarity. If more than one record has been added at the same time, the circles will show as a **bigger circle** for records from the same category or as a **cluster of multiple colours** for records from different categories.



1 To see the records within a specific period, select your period e.g. hour, day, week, month or year.

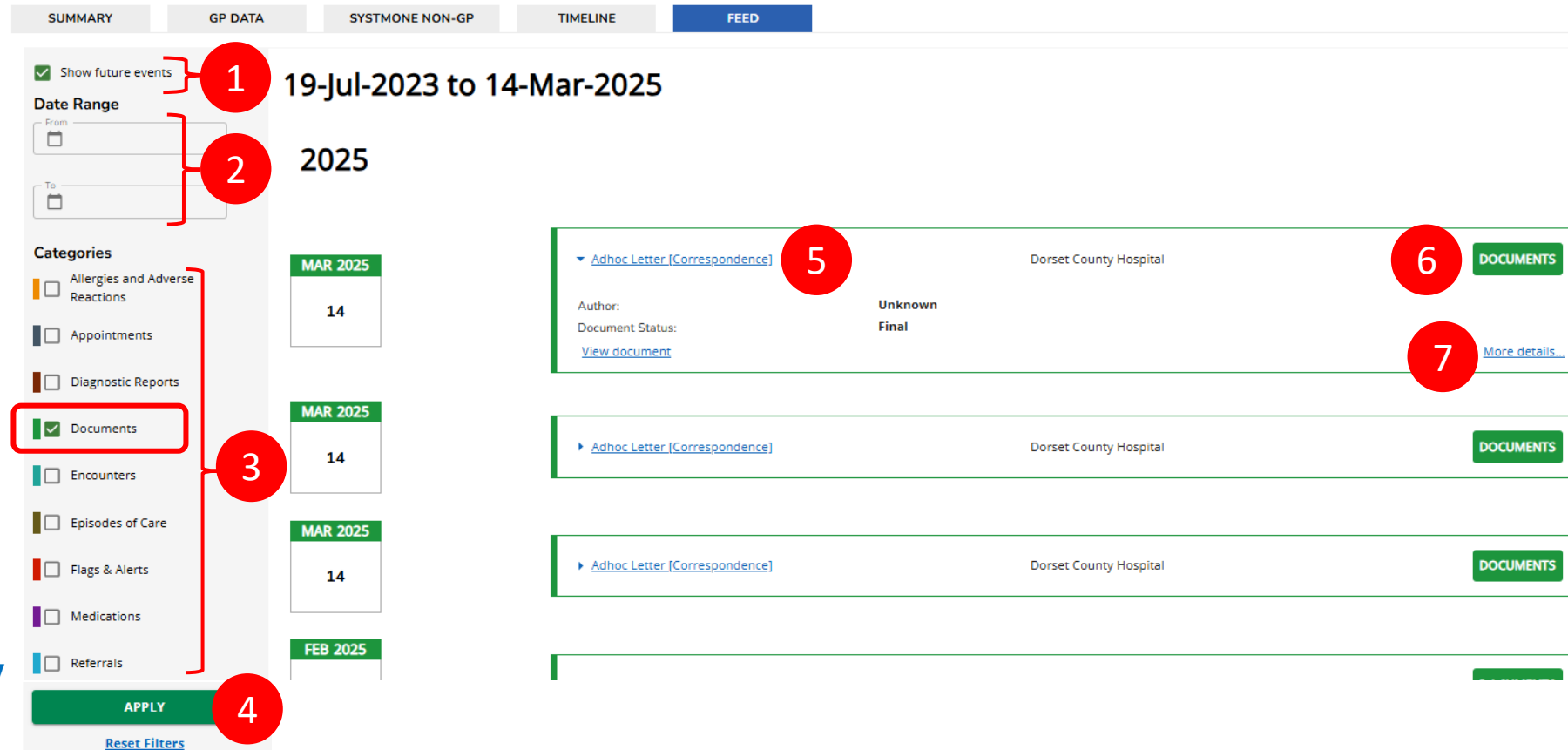
2 If there are **no** records to display, change the selection or use the arrows either side of the timeline to view earlier or later records. The **green numbered circles** above the arrows show the number of records that fall outside the selected period.

3 Hover over or click on a circle/cluster to see the records it contains and see these listed underneath the timeline.

4. Documents can be seen on the Feed tab

The **Feed tab** provides a vertical chronological view of the data entries/records from all the panels. This display can be constrained to a certain date range, and/or filtered by category.

- 1 'Show future events' allows you to see upcoming appointments/records.
- 2 Select a **Date Range**.
- 3 Filter results - Deselect **Categories** not of interest.
- 4 Click **Apply** and see the results appear on the right.
- 5 Click the **blue arrow and description** for a summary of the entry.
- 6 Click on the **coloured category rectangle** to navigate to the panel table view.
- 7 Click **View Document or More details..** for more information.



The screenshot displays the Dorset Care Record interface with the **FEED** tab selected. The left sidebar contains filters: **Show future events** (checked), **Date Range** (19-Jul-2023 to 14-Mar-2025), and **Categories** (Allergies and Adverse Reactions, Appointments, Diagnostic Reports, **Documents** (checked), Encounters, Episodes of Care, Flags & Alerts, Medications, Referrals). A red box highlights the **Documents** category, and a red arrow points to the **APPLY** button. The main area shows a list of document entries, each with a blue arrow, a description, a category rectangle, and a **DOCUMENTS** button. The first entry is an **Adhoc Letter (Correspondence)** from Dorset County Hospital, with an author of **Unknown** and a status of **Final**. A **View document** link is also present.



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. The DCR Partners apply various levels of restrictions and sensitivities within their own systems, and the DCR displays the data as provided by the Partners.

The demographics information in the DCR is provided by the PDS (Personal Demographic System)/NHS Spine system.