User Guide

Contents

Aims

- To give an overview of the Care and Health Information Exchange (CHIE).
- To explain the acceptable user agreement.
- To show how to flag issues and request assistance.

What is the care and health information exchange?

The Care and Health Information Exchange (CHIE) is a secure system which shares health and social care information from GP surgeries, hospitals, community and mental health, social services, and others. CHIE helps health and care professionals across Hampshire, the Isle of Wight and surrounding areas provide safer and faster treatment to patients and clients.

Why use CHIE?

To see which organisations, send data to and/or access CHIE, visit our website:
CHIE | About Us (careandhealthinformationexchange.org.uk)

In addition, many healthcare organisations actively use CHIE information to assist with providing direct care to patients and clients. These include:

- South Central Ambulance Service (SCAS)
- GP Out Of Hours services (OOH)
- Care homes
- Hospices
- Prisons
- Continuing Health Care (CHC)

N.B. CHIE is not a complete patient record; it is intended as a supplementary resource to your main operating systems. Please confirm information with alternative sources and use clinical judgement prior to any health or care decision making.

New to using CHIE? Watch our Lunch and Learn webinar here

Accessing CHIE

CHIE can be accessed by users in one of two ways:

- via a link or button within their organisation's main health/care system, referred to as Single Sign On (SSO) **or**
- via a web browser using a Username and Password.

95% of CHIE users can now access directly from their organisations system.
Click here to view the access guide for your organisation.

If your organisation accesses CHIE via the web browser,
Click here to view the Web Browser access guide

Acceptable Use Agreement

CHIE has been designed to make information available for health and care professionals at the point of care. Feeling empowered to access a patient/client record is a key stage in delivering direct client care.

The Acceptable Use Agreement (AUA) for health and care users of CHIE states:

I will ensure that where practical, as a care professional, I will inform the patient before accessing CHIE for patient care. If the patient is unconscious or not present but would benefit from my care, I may use my professional judgement about accessing the information. I accept that a CHIE record may be incomplete and will make my clinical decisions accordingly.

I understand that I am only authorised to access a record in CHIE for a patient with whom I have a legitimate care relationship and that my continued employment and any professional qualifications/registrations may be at risk if I access records inappropriately. This may also be illegal and subject to criminal proceedings.

I agree to keep my account credentials secure and will not share with anyone else. I will make sure that no one else can access the CHIE in my name.

I am aware that an audit trail will detail my name and date of all records that I have accessed/viewed and that a patient can request a copy of the audit trail of all staff who have accessed their record. I accept that my personal details will be recorded for the purposes of the audit trail.

I accept that disciplinary action may be taken against me if I do not abide by the security & confidentiality policy.

I accept that CHIE is not a complete patient record and is intended as a supplementary resource to my main operating systems. I will confirm information with alternative sources and use clinical judgement prior to any health or care decision making.

If my account is not used for 90 days, my next login will display "Error 500 an Unexpected Error has Occurred" I will then need to contact info.chie@nhs.net to have my account re-activated.

Audit Trail

As stated in the CHIE audit policy, the CHIE team will conduct a proactive compliance audit twice a year on a random selection of active users. This is to ensure that users of CHIE are using the system according to the CHIE Acceptable Usage Agreement (AUA) and Terms of Use for CHIE (TORs).

All access to CHIE is recorded by the system, generating an audit trail to show the name of the person accessing the record, date/time of the access, the patient's name/NHS Number and areas of the record viewed.

The results of the above audit information will then be passed to the identified Audit Lead of the organisation or their equivalent to check and confirm that all access was been carried out in accordance with the CHIE AUA and TORs.

Users inappropriate access to information within CHIE could lead to disciplinary action.
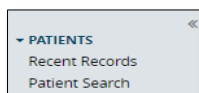
Accessing Patient Information

Patient Search: (for web browser access users only)

Watch our Search for a patient video tutorial.

N.B. *If you are accessing via a link or button within your organisation's main health/care system, referred to as SSO this function will* **NOT** *be available*.

- Select 'Patient Search' from the list.

- If you cannot find the menu, please select icon on the left-hand side of the screen to 'Show Menu.'

- Type the NHS number of the patient and click **search**. If you don't have the NHS number please type in the First name, Last name, Date of Birth and Gender to search for the patient.

N.B. *It is considered best practice to search using NHS Number, if this is unavailable a minimum of Last Name, Date of Birth and Gender must be provided.*

Patient Record:

The landing page/home screen:

This is the first page that you will see, the content of which is determined by your job role (Role Based Access Level). An example of a typical clinical practitioner landing page:

Depending on your Role Based Access level (RBAC), you may also be able to navigate from the landing page to additional information.

The patient summary area displays a chronologically sorted (with the most recent information first) summary of information sourced from the primary care and social care systems. These summaries display up-to-date information from the patient's GP practice clinical system. Information is displayed in groups, e.g., Current Problems (Significant). These groupings are called 'windowlets'.

Each windowlet displays up to five lines of information.

Current Problems (Significant) ▢

Onset	Description	Note	Data Source
08-Nov-2018	Gastro-oesophageal reflux disease	-	GP TPP on 31-Jan-2021
« Previous	Next »		
Results 6-6 of 6			

Select the **Next** button to display more information.

Current Problems (Significant) ▢

Onset	Description	Note	Data Source
18-Sep-2020	Total thyroidectomy	-	GP TPP on 31-Jan-2021
19-May-2020	Retrosternal goitre	-	GP TPP on 31-Jan-2021
23-Oct-2019	T3 toxicosis	-	GP TPP on 31-Jan-2021
26-Mar-2019	Essential hypertension	-	GP TPP on 31-Jan-2021
26-Mar-2019	Stage 1 hypertension (NICE - Nat Ins for Hth Clin Excl 2011)	-	GP TPP on 31-Jan-2021
« Previous	Next »		
Results 1-5 of 6			

You can expand a windowlet by selecting the Maximise ▢ button next to the title.

The patient record has two sections:

a. Patient demographic banner. This is et as default and will always be available to view at the top of the patient record.

b. The information tabs. These include Patient Summary, Care Network and Medicines Viewer. The information displayed will be dependent ng upon the tab that you are viewing.

Patient Demographics Banner:

Once in a patient record, the demographic details of the patient can be found by viewing the top banner of the record. This information is shared to CHIE from GPs, the NHS Spine (PDS) and acute hospitals.
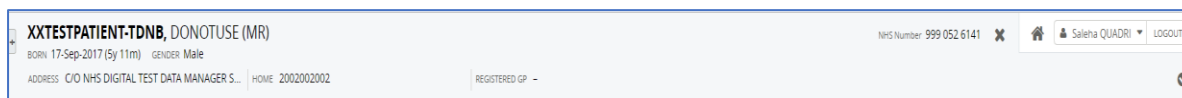
- Click on the arrows to maximise (⊙) and minimize (⊙) the banner.
- Click on the **more** buttons (highlighted in red below) to expand the relevant section of the banner. See screenshot below:
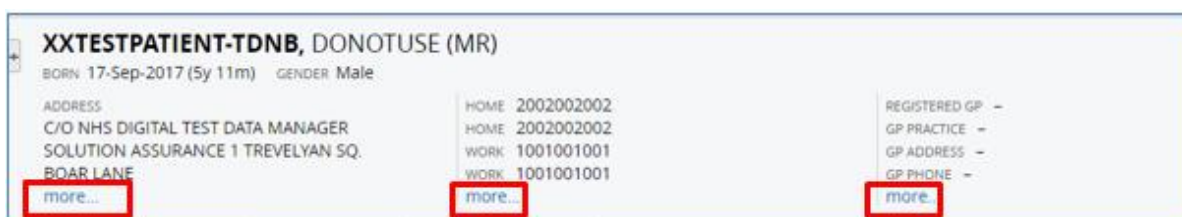
- Sometimes a patient record may be marked as 'Sensitive'. This will be indicated by a '**Sensitive record**' flag displayed on the demographic banner. D

The demographic information for these patients will not be available to view. D. NB. A sensitive record is marked with an 'S' flag on the SPINE or Patient Demographic Search (PDS). This flag is added by the GP upon the request of a patient. This is done to restrict access to patient location information on a PDS record.

N.B. *When a patient has been identified as 'Sensitive' extreme care should be taken while adding/uploading any new documentation in the patient record. All demographic information (mainly address) should be removed before documentation is uploaded.*

Patient Information Tabs/Views

A patient's record in CHIE is divided between three information tabs:

1. Patient Summary View
2. Care Network
3. Medication Viewer

Patient Summary View

Introduction to the CDV

Most of the health and care information in CHIE is displayed in the Patient Summary View tab (the default record view). . This patient summary view displays 'The Clinical Document Viewer' or 'CDV Tree' which efficiently organises and distributes all health and care information for easy retrieval.

The Clinical Document Viewer (CDV tree) shows a list of health and care information available to view in the patient record. This can include, pathology, radiology reports, documents, primary care information such as encounters, medications, and social care information.

- All health and care information appears under folders/nodes on the CDV tree. Click on the arrow heads (highlighted in yellow in the screenshot below) by the node on the CDV tree to open the folders.

- The number by the folder/nodes indicate the number of items or documents available for you in that folder/node. The example on the right an open Care Plans folder for a patient with 11 care plans available to view.. When the folder is open you can see the number and different types of documents that are available.

- The documents are organized in a chronological order, the most recent being on the top of the list. Click on the document to view it on the right side of the screen.
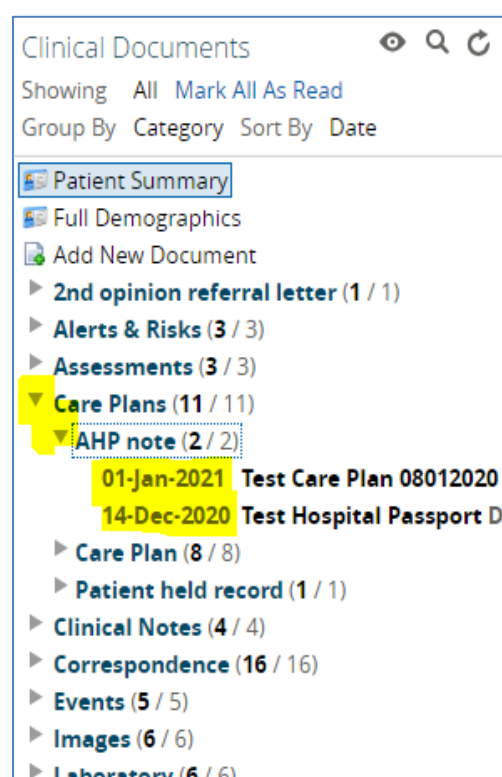
N.B. *Some items in the CDV tree will appear as PDF documents and some as embedded 'text'. Only PDF documents can be printed from CHIE. For details on printing please see the printing section of this guide).*

The CDV tree will display differently for different patients due to the following reasons:

- **Organisations sharing information to CHIE:** The data shared to CHIE differs from organisations to organisation. e.g., University Hospital Southampton (UHS) shares maternity documentation to CHIE, whereas other acute organisations do not share documentation from this specialty. The CDV tree for a new mother presenting at UHS, will,

potentially, display more information compared to a new mother that has been seen at Portsmouth Hospitals University NHS Trust (PHU).

- **Filter applied to the CDV tree:** Filters applied to a patient record by a user resulting in a different sort order.

- **Roles assigned to CHIE users:** To ensure that staff can only access the information that they require for delivering and supporting direct patient care, users of the CHIE system are allocated a level of access in accordance to their job/role/profession. This is in accordance with the current CHIE information governance policies. Different roles will define the CDV tree for staff members:

    a. All clinical staff are allocated the CHIE user access level: 'Clinical role'.
    b. Administrative staff are allocated the CHIE users access level: ''Clerical role'.
    c. Social care workers are allocated the CHIE users access level: 'Social worker role'

- **Documents from acute trusts:** – Some information such as 'Documents' from acute Trusts may not be available if they are not 'Finalized/Completed and signed off' in their main electronic patient record (EPR). This could make the CDV tree look different to other patients.

Examples below show the differences in results from filtering applied to CDV:
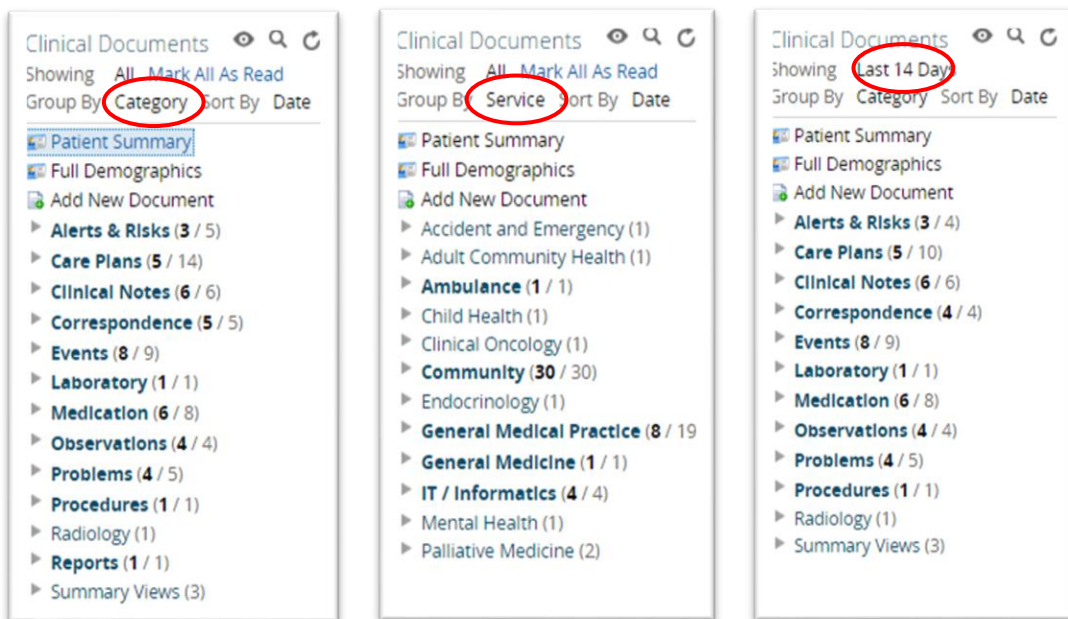
Organize/Sort the CDV tree:

The CDV tree can be configured/customized by every staff member accessing patient records in CHIE. Some staff find it helps them to find the information required by sorting the items in the CDV tree. The tree can be organized by using the option 'Configure the 👁 document tree' icon below the patient banner. Please see highlighted section in the screenshot to the right.
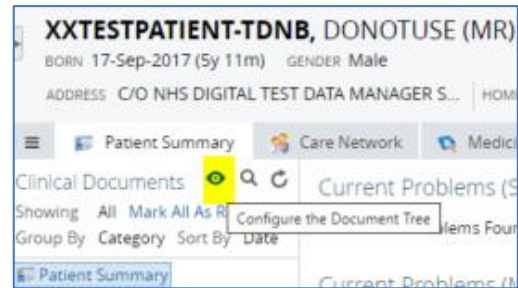
To group by Organisation:

The CDV tree can be used to group all information from different organisations into their respective folders. Open the folder of the organisation to view the required information in chronological order.
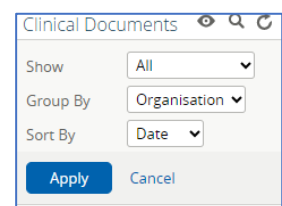
Follow steps below to organize by Organisation:

- Click on the 👁 icon.

- Click 'Group by' drop down menu.
- Select the Organisation
- Click Apply

a. **To group by Service:**

The CDV tree can be used to group all information into Services. Open the folder of the service to view the required information in chronological order.
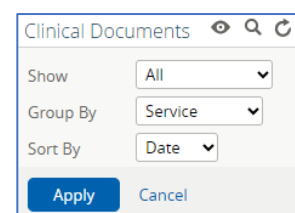
Follow steps below to organize by Service:

- Click on the 👁 icon.

- Click 'Group by' drop down menu.
- Select the Organisation
- Click Apply
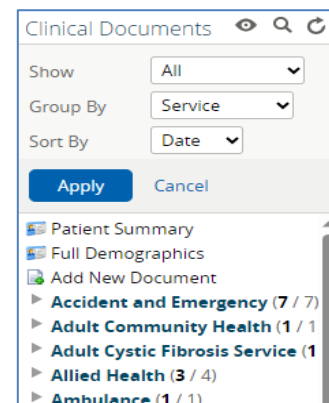
b. **Search:**

The CDV tree allows you to use key words to o search for information.
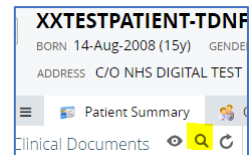
Follow steps below to Search for specific information:

- Click on the 🔍 'magnifying glass' search option under the patient Summary tab on the CDV tree (see screenshot)
- Type in key word(s) (e.g. Lymington and click search.
- All information relating to your 'key word(s)' will appear to view on the CDV tree in a chronological order.
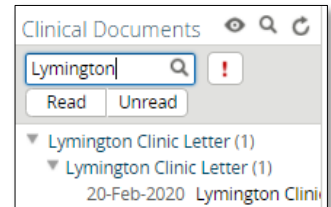

Viewing a Clinical Document

- Select the flag ▶ to the left of the chosen title to open the folder.
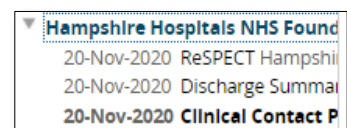
- Hover over the document title you wish to view to briefly see the details of the document. This information is also referred to as the 'meta-data' associated with the document.
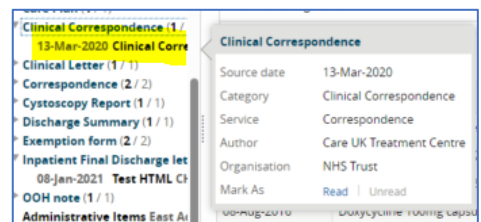
- If you are unable to read the entire title of the item in the CDV tree, click and drag the column on the right (highlighted in yellow below) to adjust the size of the CDV tree.
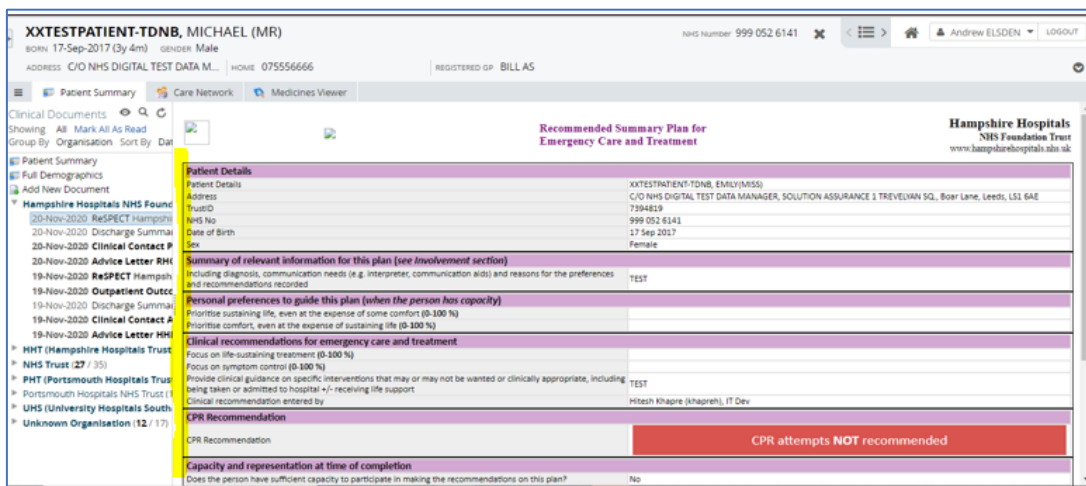
- Click the document you wish to view, and it will be displayed on the main screen.
- Some documents appear as PDFs and some as embedded in the main screen. This is because of the sharing arrangements agreed with different organisations.

Printing a Clinical Document

N.B. CHIE is intended to be a 'View only' system, a one place digital repository of all health and social care information to help staff in direct patient care. Therefore, the printing of documents from CHIE is discouraged. This is because the data controller (owner) of the document/original source of the document, may not have intended for the document to be surfaced/stored in another location.

However, should there be a need to print, then this can be done in multiple ways:

1. PDF documents – Right click on the document and click print.
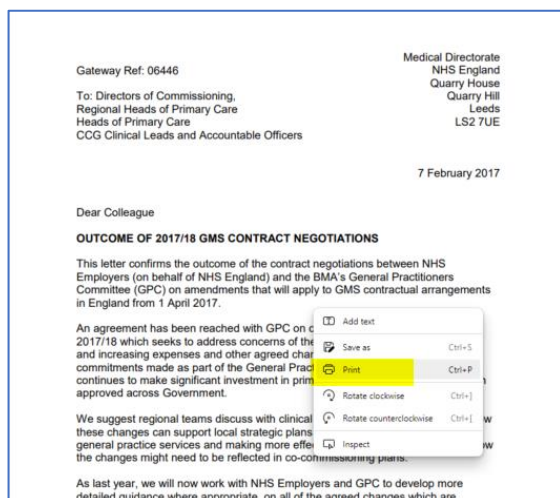
2. Embedded documents – left click and drag the mouse over the document. Right click and

select Print.

3. Documents that have been manually uploaded to the system by a CHIE user.

Select a document in CHIE. Click on the print icon
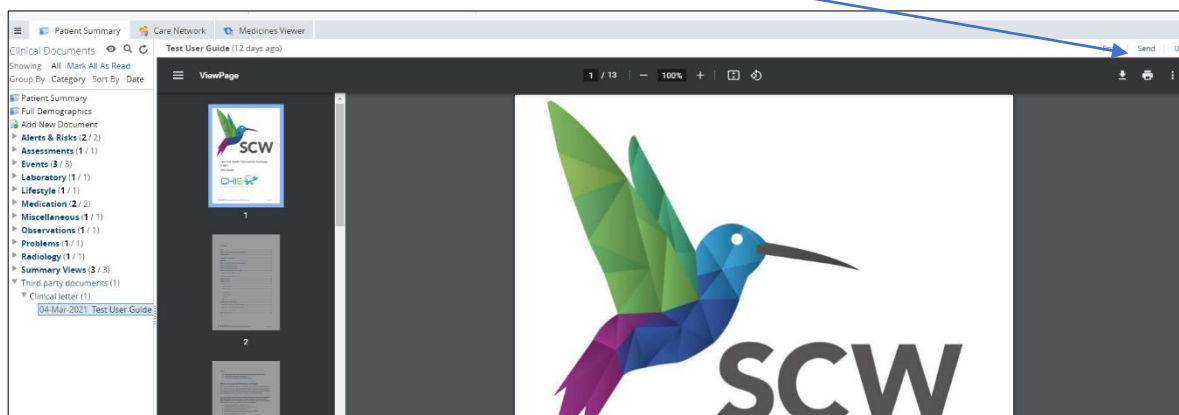
N.B. – Any documents that you print should be handled under your own organisation's record management guidance.

Viewing Laboratory Results

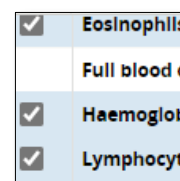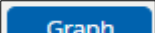Select the flag ▶ to the left of the chosen title, then select the item you wish to view.
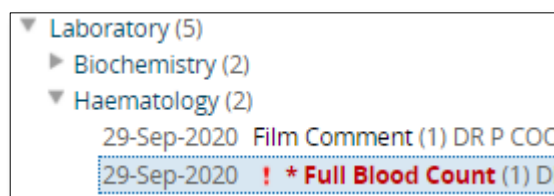
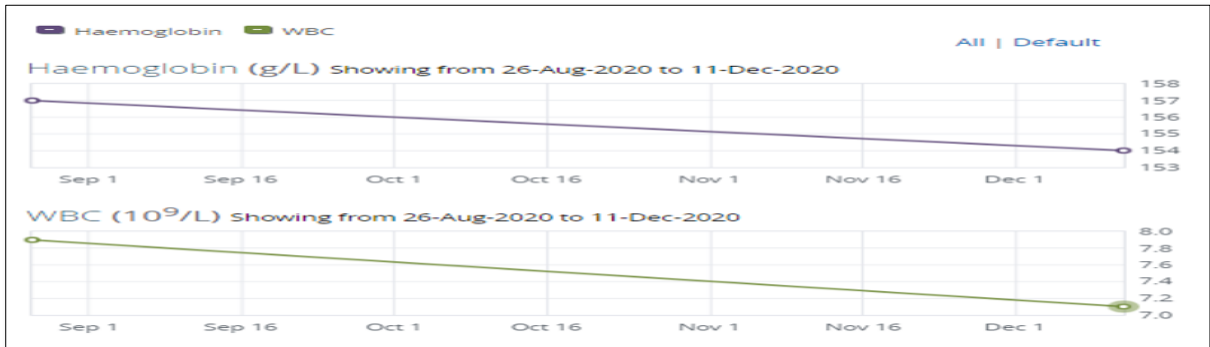Select the item you wish to view, and it will display:

N.B. - Due to current system limitations, historical results that are 'out of range' do not display in red. However, in this example they are shown in red.

To plot results on a graph, select the relevant tick boxes.

Select the [Graph] button to display the graph:

Viewing Alerts

Alerts and Risk information is limited to the Allergies, Sensitivities, Contraindications and Safeguarding information as added in primary care systems and some community settings systems. Further information may be available in other sections of the CHIE record.

N.B. Alerts and Risks from Southern Health can be found in the relevant sections within 'Summary Views'

Select the item you wish to view to display., Select the flag ▶ to the left of the chosen title to expand any subcategories:
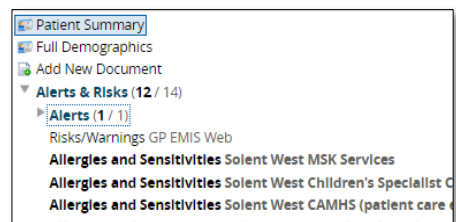
Primary Care

Select Risks/Warnings to display Allergies and Adverse Reactions, Contraindications and Safeguarding recorded with Primary Care.
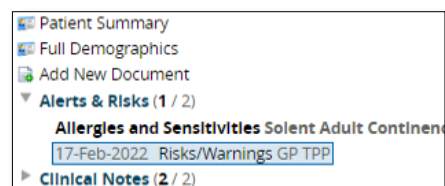
The information is displayed within individual windowlets, sorted chronologically with the most recent information displayed first, as shown below:

Community and Mental Health

Select 'Allergies and Sensitivities' sections to view current and historic Allergies and Adverse Reactions information sent from Solent Community Services. This information is displayed as below:

N.B. A view will be available for each of the Solent Community services for which a patient is under. The Allergies and Adverse Reactions sections may present as blank but this can vary from service to
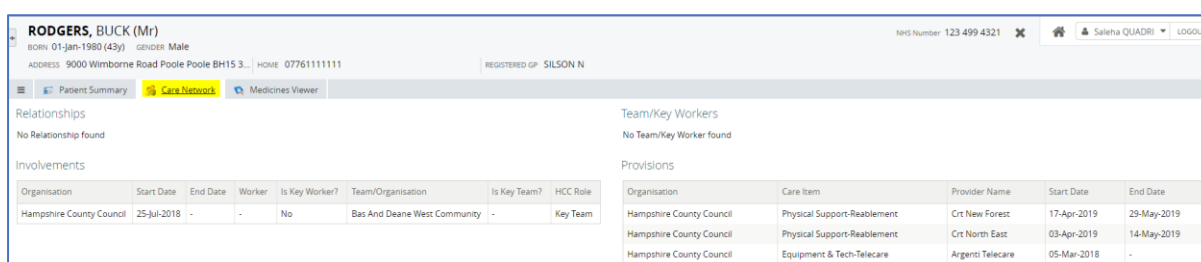
service. The screenshot below shows the variation between data displayed from different Solent Community services for the same patient.

Care Network Tab/View:

The Care Network tab/View displays the social care data that has been shared by Southampton City Council (SCC) and Hampshire Country Council (HCC). The information is displayed in windowlets, listing five rows of data, with the the most recent information displayed first. Additional information can be found by clicking on the 'Next option'. Please see screenshot below:

Social care information such as Relationships, Involvements, Team/Key Workers, and Provisions can be found in this section of the patient record.

N.B. *Currently no data from SCC is being received in CHIE. This is due to the change of an electronic record system in SCC. However, this is expected to change in the very near future as work progresses enable the sending and receipt of this information.*

Medicines Viewer:

Watch our Medicine viewer [video](#) tutorial

*The medication viewer does not reflect all care systems medication lists.

The Medicines Viewer displays medications information from the patient's GP practice clinical system only. Medication information from Community and Mental health systems/organisations can be found in other sections of the CHIE record.

CHIE is a supplementary resource intended to support clinical decision making but does not replace clinical judgement.

N.B The Medication Viewer may not contain an accurate, up to date, or complete list of medications*. Please use for guidance only, not as your primary source of medications information, prior to any health and care decision making.

Click the Medicines Viewer tab to view medications information sent from the GP or primary Care setting.
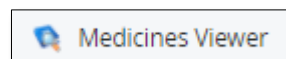
N.B. By default, the last 2 years of a patient medications are presented in table , grouped by Medication.

Organise/Sort the Medicines Viewer:

The Medicines Viewer can be organized/sorted by using the sorting toolbar available under the patient banner. The different ways in which Medicines can be sorted are:
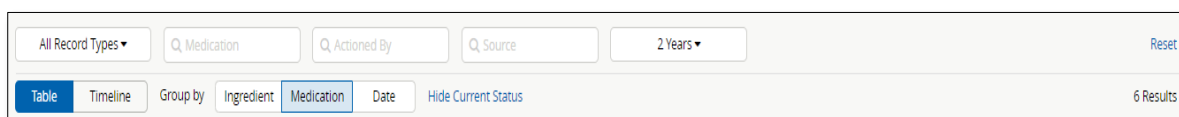
    a. All Record Types - Issued/On record/Immunisations
    b. Search function – Medication/Actioned by/Source
    c. 2 years drop down menu – ranges from a 1 month to all dates/ Custom dates
    d. Group by – Ingredient/Medication/Date
    e. Table/Timeline - Toggle
    f. Hide Current status – to view historic medications only

All Record Types - Issued/On record/Immunisations

The default view displays all record types.

- Issued - all prescribed medication.
- On Record - all medications added to the patient record and then may or may not be prescribed.
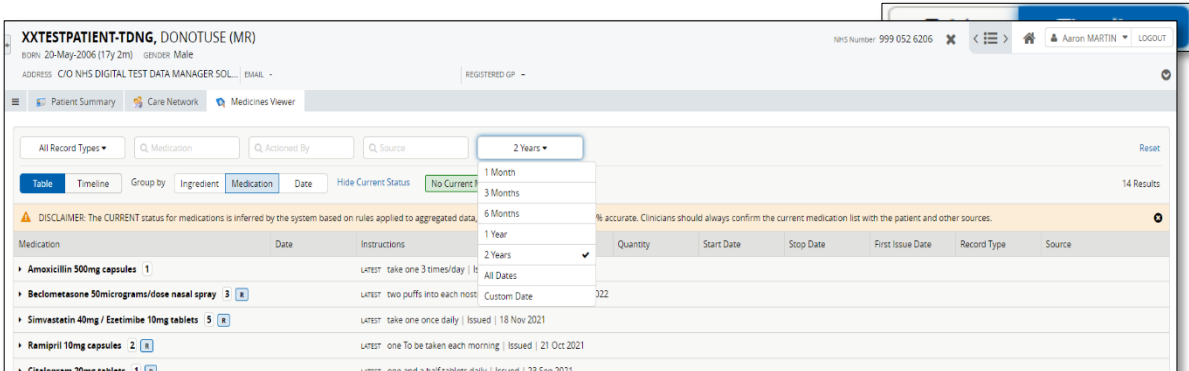
NB. *There is no dispensed information available in CHIE.*

- Immunisations – All Immunisations and Vaccinations as recorded by GP/Primary care. (N.B. This may not be a complete record.)

If you select an item e.g., Immunisations, it will remove those items from view.
Select it again and it will return those items to view.

Click the '2 years' drop-down menu to change the date range to view the Medication history in a table format. This gives you a list of all the drugs (available on CHIE) for the dates selected.

Toggle between Table and Timeline view.

- o This groups the medications together for easy view.
- o Table view groups all same medications together and indicates, by adding a number next to the drug, the number of times it was prescribed.
- o Click on the arrowhead next to the medication (highlighted in yellow below) to view the details i.e., dates, quantity, start date etc.
- o In the below example there were 5 Salbutamol inhalers, in total, prescribed to the patient at different dates. These were all grouped together and appear in one folder. Open the folder to view details.

Medication	Date	Instructions	Quantity	Start Date	Stop Date	First Issue Date
▸ **Zerobase 11% cream (Thornton & Ross Ltd)** 1		LATEST Apply to the affected areas of dry skin TWICE daily and when required. May also be used as a soap substitute | On Record | 28 Jan 2020				
▸ **Atenolol 25mg tablets** 1		LATEST take one daily | On Record | 06 Aug 2019				
▾ **Salbutamol 100micrograms/dose inhaler CFC free** 5 R						
Salbutamol 100micrograms/dose inhaler CFC free	13 May 2019	inhale Two doses as needed	-	13 May 2019	-	-
Salbutamol 100micrograms/dose inhaler CFC free	17 Sep 2018	inhale Two doses as needed	-	17 Sep 2018	-	-
Salbutamol 100micrograms/dose inhaler CFC free	12 Aug 2013	inhale 2 doses As needed	-	12 Aug 2013	-	-
Salbutamol 100micrograms/dose inhaler CFC free R	07 Nov 2012	inhale 2 doses As needed	1 pack of 200 dose inhaler	07 Nov 2012	05 Dec 2012	-
Salbutamol 100micrograms/dose inhaler CFC free	18 Sep 2012	inhale 2 doses As needed	-	18 Sep 2012	12 Aug 2013	-

- The Timeline View groups the interactions with medications or ingredients. The view presents rows of prescriptions given over a period. Use accessibility tools (highlighted below) to navigate or magnify the date range.

Filters

All Record Types

The default view displays:

- Issued: all issued medication.
- On Record: all medications added as a course regardless as to whether they have been issued.
- Immunisations: Immunisations and Vaccinations
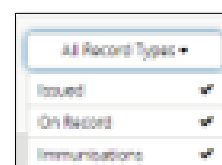
If you select an item e.g., Immunisations, it will remove those items from view. Select it again and it will return those items to view.

Search Filters

Use the search filters to filter specific medication lists.

Date Range

Select the required period in the drop-down options. Use this option to alter the date range of the chosen medication list.

2 Years ▾

Group By

Use to toggle between:

Group by | Ingredient | Medication | Date

N.B. – The Timeline is an alternative way of viewing the interactions over time. It is not available when the 'Group by' Date filter is selected.

Badges

The hidden rows are separate interactions with the medication. The count shown (2) is a number on record and issues recorded for the medication listed.

Select the flag ▸ to view the hidden lines of information.

▾ Metformin 500mg tablets	2	CURRENT	R							
Metformin 500mg tablets	take two tablets twice a day with meals	112 tablet	03 Nov 2020	-	03 Nov 2020	03 Nov 2020	On Record	Bramblys Grange Medical Centre EMISWEB
Metformin 500mg tablets R	take two tablets twice a day with meals	112 tablet	-	-	03 Nov 2020	03 Nov 2020	Issued	Bramblys Grange Medical Centre EMISWEB

CURRENT : Current in CHIE Medication Viewer <u>is not</u> 'Active medications' in the same way primary care records are represented. In CHIE, repeat medications are only labelled 'current' if that medication has been re-issued or updated in the last 14 weeks. If this is not the case, it will no longer be displayed as a current medication.

R : the medication is on a repeat or repeat dispensed prescription.
A : the medication is on an acute prescription.

Help and Assistance

Download this and other user guides and webinars from our [CHIE information website](#)

If you have any other CHIE specific questions or support needs, please contact the CHIE team info.chie@nhs.net

VERSION CONTROL

Document Title	Document Type	Version	Date	Source
CHIE User Guide	Guide	1.0	05/02/2021	Andrew Elsden

CHANGE CONTROL

Document Title	Version	Date	Author	Change	Purpose	Approved
CHIE User Guide	1.1	03/11/22	AE	Update	Update web links	KG
CHIE User Guide	1.2	02/12/22	AE	Update	Update web links	KG
CHIE User Guide	1.3	29/09/23	SQ	Update	Added additional information upon feedback	KG
CHIE User Guide	1.4	23/10/23	SQ	Update	Updated AUA text	KG