



Quick Reference Guide (Clinical Document Viewer)



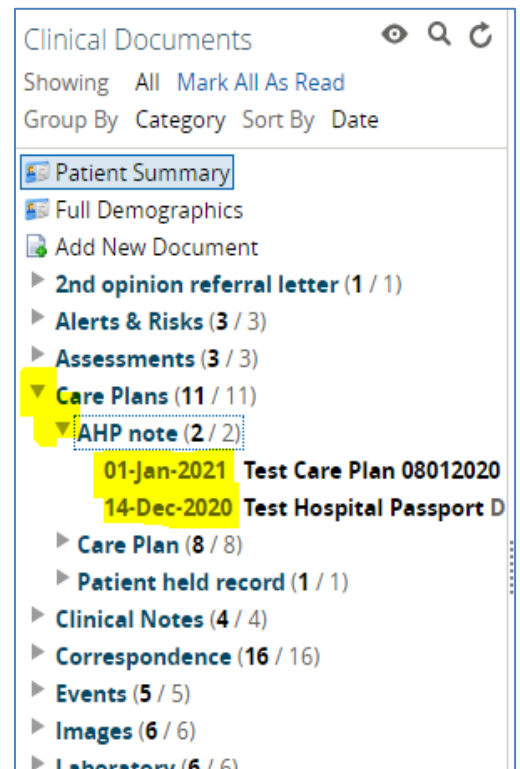
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OVERVIEW

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 organizes 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).

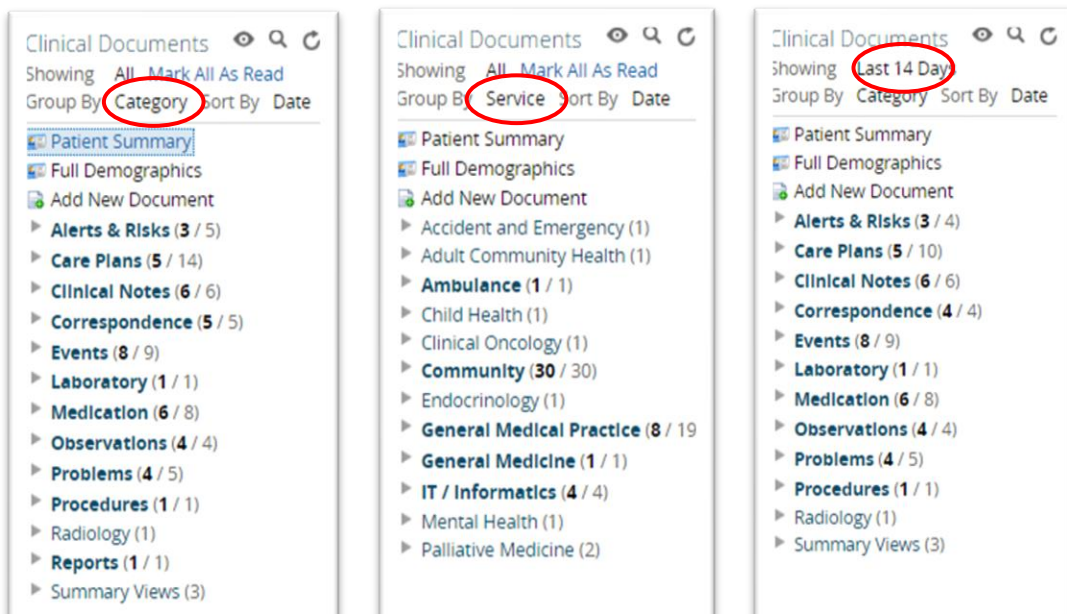
The CDV tree will display differently for different patients due to the following reasons:

- 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).

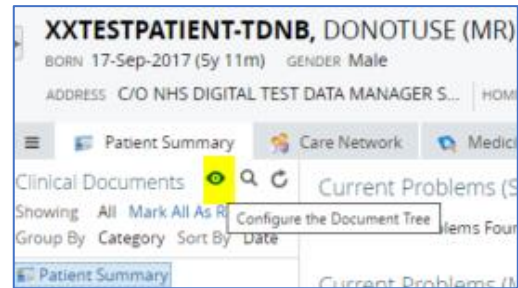
- Filter applied to the CDV tree: Filters applied to a patient record by a user resulting in a different sort order.
- Roles assigned to CHIE users: To ensure that staff can only access the information that they require for delivering and supporting direct patient care, users of the CHIE system are allocated 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' . is
- 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:



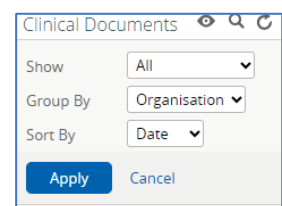
ORGANIZING AND SORTING

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.




a. 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.



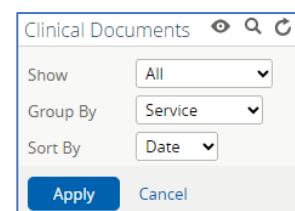
Follow steps below to organize by Organisation:

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




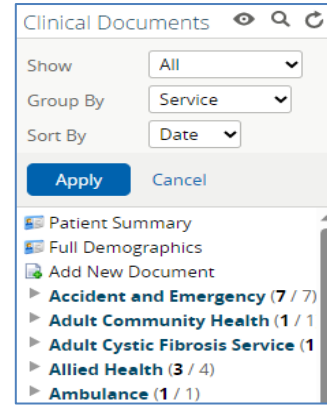
b. To group by Service:

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.



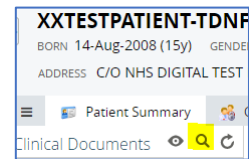
Follow steps below to organize by Service:

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




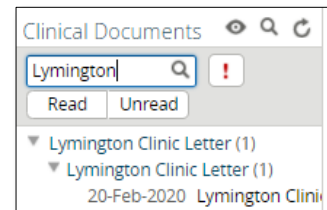
SEARCH FUNCTIONALITY

The CDV tree allows you to use key words to search for information.




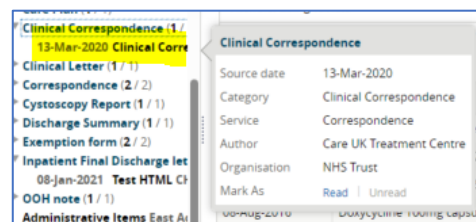
Follow steps below to Search for specific information:

- 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.

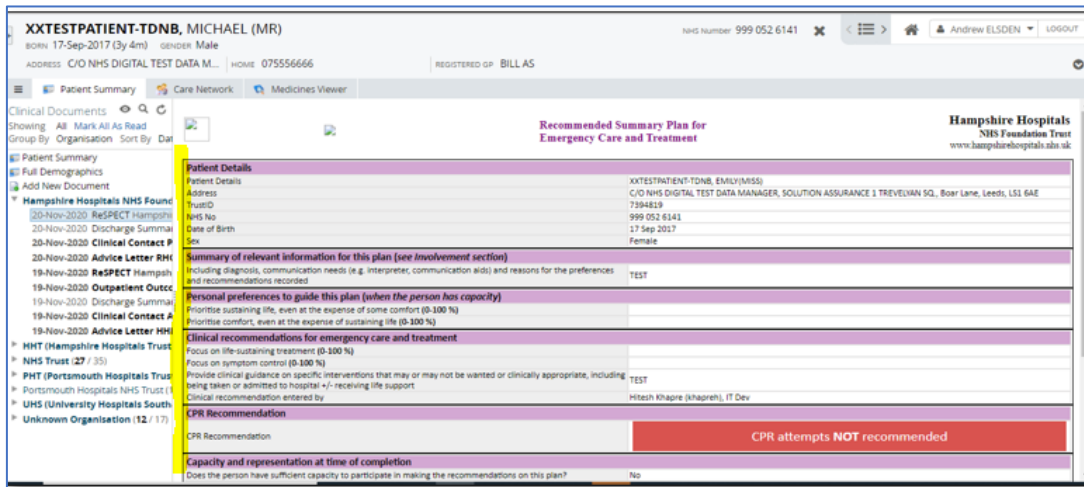


VIEWING A CLINICAL DOCUMENT

- 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.

VERSION CONTROL

Document Title	Document Type	Version	Date	Source
QRG – CDV	Crib Sheet	1.0	05/02/2021	Andrew Elsdon

CHANGE CONTROL

Document Title	Version	Date	Author	Change	Purpose	Approved
QRG – CDV tree	1.2	14.06.23	SQ	Layout	Review	KG
Clinical Document Viewer	1.3	24.10.23	SQ	Content	Update	KG