Documents

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Overview

Received documents can be uploaded to the Client's record. These can be uploaded against a particular referral or progress note or directly into the documents area. Emails/documents can be saved or scanned and uploaded to the Client's record.

Documents can also be automatically generated from the templates stored in a Service's Rio Template section and then saved into the Client's record.

Appointment letters can also be generated from a Clinic or Diary Appointment.

Uploading a Referral Letter via the Referral

A referral letter/document can be uploaded directly to the client's referral. This would need to be scanned if sent via fax or letter or saved on the computer in the nominated folder.

Locate the Referral recorded for the Client

- Click **Referral**

Specialty	Care Setting	Team	HCP Referred To	Date & time referral received	Contact	To Discharge		RTT	Waiting List(s)
HEALTH VISITING	Community and Clinic	CFHV Finch Road (6 Jun 2023)		21 Apr 2023, 09:00	Y		Transfer		

The referral will display

Associated Documents

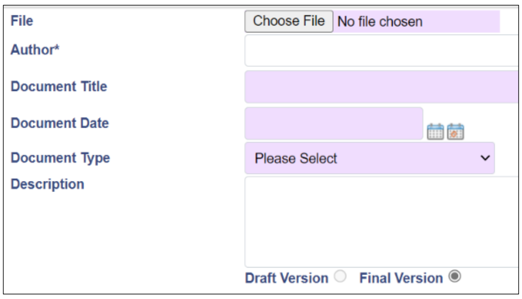
Date	Type	Title
	-No Documents Associated-	

- Click

Set Associated Documents displays

- Click **Upload New Document**

The Document Upload screen displays



- Click **Choose File**

Locate the saved Referral document saved to your team's designated area

- Click **Document**

This launches Microsoft Word/PDF

- Click **Open**

Author*	Type here the author of the document, if left blank it will enter your name
Document Title	Use the Trust Document Naming Convention (Division Specialty – Document)
Document Date	Date document was created
Document Type	As specified
Description	This is not mandatory but can be completed if you wish
Draft Version	○
Final Version	⦿

- Click **Upload Document**

The Set Associated Documents window displays

Notice your document under section 'Documents associated with this Referral'

- Click **Done** The document displays at the foot of the referral
- Click **Save Referral**

Documents

The document may be viewed within the Document View on the Client's Clinical Portal – Client's View.

Viewing Documents

All documents saved or uploaded to the Client record may be viewed via Documents folder. This can be accessed via the menu or the Client's View

Accessing Via the Menu

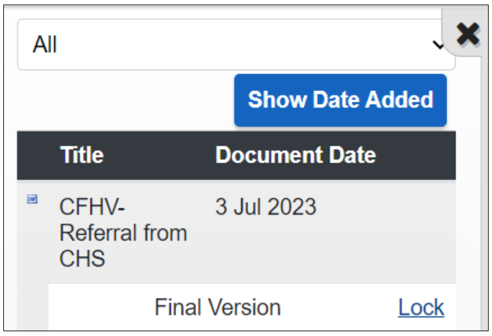
- Click 

- Click 

- Click 

- Search for client

Documents screen displays



The naming convention will group documents together via their Division and Specialty, then via date

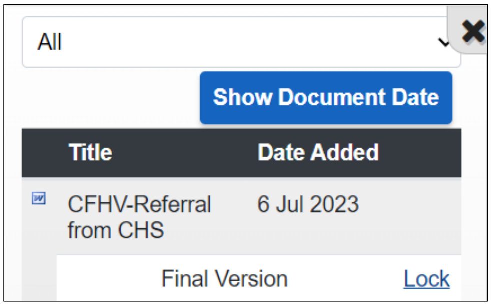
The documents will display in chronological order with the latest document displaying at the top

The document list can be filtered by the document type e.g., BCHC Clinical, Early Years as required by using the Filter drop down list.

In this example, the document date displays 3 Jul 2023, however if I wish to view the date it was uploaded to Rio

- Click 

The display now shows the actual date the document was uploaded

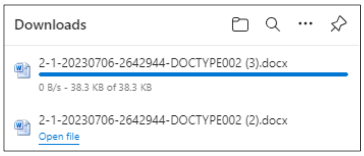


Opening the Document

- Click **Document Title**

The Document Description displays within an additional 'Download screen'

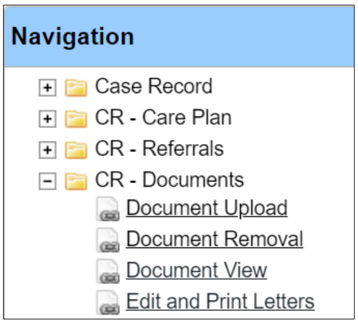
- Click **Open file**



This will take you directly to the downloads folder on your computer for you to select and open in MS Word

Please note: pdf. Document will open instantly within the Rio screen

Accessing Document View via the Clinical Portal - Client's View



Access the **Clinical Portal - Client's View**

Locate the **Navigation pane**

- Click **CR – Documents**
- Click **Document View**

Select document you wish to view or download (if pdf)

Accessing Document Templates via the Clinical Portal - Client's View

Access the **Clinical Portal - Client's View**

Locate the **Navigation pane**

- Click **CR – Documents**
- Click **Edit & Print Letters**
- Select the letter type you require from the drop down list Letter Type CF-HV Confirm Home Visit
- Click Create

Microsoft Word will open with the Rio Letter Template infilling the Service/Appointment/Client's details where specified (the letter does not print at this stage)

Amend the letter if required

Saving Letter created from Template to Rio

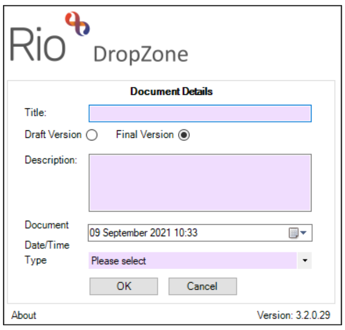
Once the letter is complete:

- Click the **DropZone** tab (top of screen)
- Click the **Send to Rio** button

The Rio **DropZone** dialogue box will open. Complete the DropZone dialogue box to save the letter in Rio. The document name **must follow** the Trust Naming convention.

Document Details screen displays

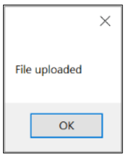
Title:	As per naming convention (see the Trust Document Naming Convention guide)
Final Version:	⦿
Description:	Brief description of content
Document Date/Time:	Today & Now
Type:	Document Type



- Click **OK**

The **File Uploaded** message displays

- Click **OK**



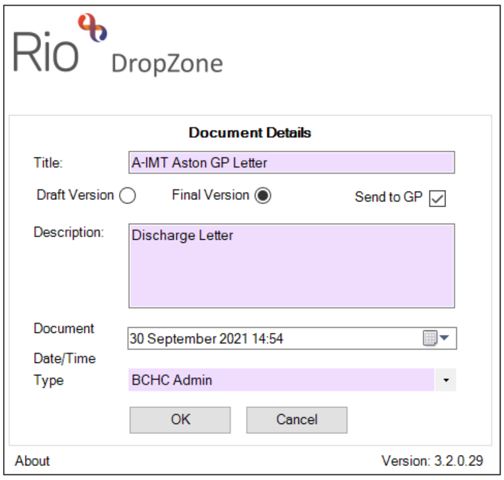
Microsoft Word will close; the Rio screen will display and the document will be saved in the Client's record.

Using DocMan Functionality

DocMan allows BCHC staff to automatically send an electronic copy of a document to the Client's GP securely via NHS Mail.

To use DocMan the following must be in place:

- The Client must have a **GP** recorded in their Rio record
- The Client must have an **NHS number** recorded in their Rio record
- A **'Type'** of **BCHC Admin** or **BCHC Clinical** must be selected when completing the Document Details



If the above are in place, then the **Send to GP checkbox** will display to the right of the Final Version radio button in the Rio DropZone dialogue box

- Place a tick in the **Send to GP** check box ☑
- Complete all necessary fields
- Click the **OK** button

The document will be saved to the Client's record and an electronic copy of the document will be sent to the Client's GP.

Generating Appointment Letters from the Clinic Screen

Once the appointment has been booked in the clinic, a letter can be generated, printed (and saved in Rio), to inform the Client of the appointment details.

- Click List

The Clinic List view will display

Locate the appointment and look at the 'Other' column

- Click

The Print Letter Selection window displays

- Select template required

- Click **Print**

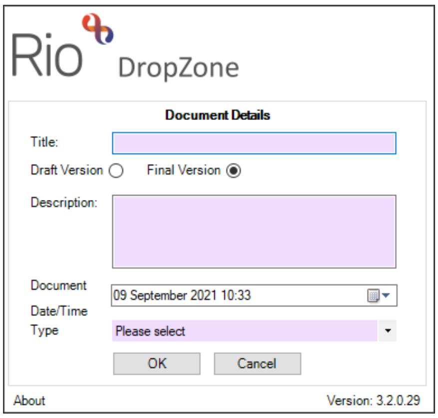
Microsoft Word will open with the Rio Letter Template infilling the Service/Appointment/Client's details (the letter does not print at this stage)

Amend the letter if required

- Click the **DropZone** tab (top of screen)
- Click the **Send to Rio** button

The Rio **DropZone** dialogue box will open. Complete the DropZone dialogue box to save the letter in Rio. The document name **must follow** the Trust Naming convention.

Document Details screen displays



Title: As per naming convention (see the Trust Document Naming Convention guide)

Final Version: ⦿

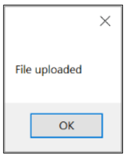
Description: Brief description of content

Document Date/Time: Today & Now

Type: select as required

- Click **OK**

The **File Uploaded** message displays



- Click **OK**

Microsoft Word will close; the Rio screen will display and the document will be saved in the Client's record.

Batch Printing Letters

If there are several appointments on the **__List__** view, these can be selected ☑ and printed altogether using the Batch Printing functionality.

- Place a tick in the checkbox to the left of all appointments on the List View

- Click Batch Print Letters

The Print Letter Selection window displays

- Select template required

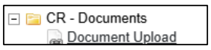
- Click Print

PLEASE NOTE: The disadvantage to using the Batch Printing functionality is the letter **__will not be saved__** in each individual Client's record.

Saving Draft Documents

Documents can be uploaded and saved in a draft format which allows them to be edited later.

For Uploading



Follow the normal uploading process from the Navigation pane and Document upload link. Ensure that the **Draft Version radio button** ⦿ is selected not the Final Version radio button ○ before uploading the document.

- Click **Draft Version** ⦿ radio button
- Click the **Upload Document** button Upload Document (bottom)

An **Information** prompt will display asking if you want to mark this document as Draft?

- Click **Yes**

A second **Information** prompt will display telling you the file was uploaded successfully and asking if you would like to upload more documents, link this document to other clients or view the document list?

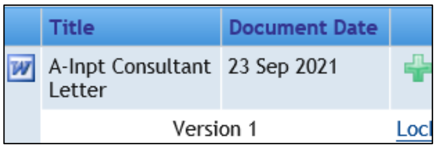
- Click **Show List View** to open the **Documents** screen and view the Client's documents

For Letters Created in Rio

Follow the normal process but ensure that the **Draft Version radio button** ⦿ is selected not the Final Version radio button ○ before saving the document.

Documents

Draft Document View

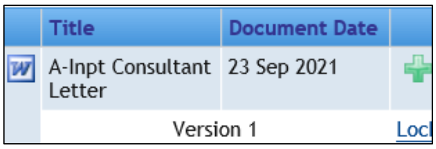


Draft documents will display with the **Version number** and the **green plus** icon in the Documents screen.

The example to the right shows Version 1

Changes can be made to the document and saved. This can be uploaded again as a draft. This would be Version 2, Version 3, etc.

Updating a Draft Document



- Ensure the **Documents** screen is displaying for your Client
- Locate the required draft document
- Click the **Title** of the document

The **Document Description** will display in full at the top

You may be prompted to **open** the document via the Downloads window '**Open file'** link

This will open the document.

If you are not prompted to open the document,

- Click the **Save locally** Save locally link on the left hand pane at the top, where the description of document displays in full. Follow the download prompts as mentioned to open file. This will open the document.

Make amendments to the document as necessary.

When ready to print and save to Rio as a final version:

- Click **File**
- Click **Save As**

Save document in your designated place

The amended document can now be uploaded into Rio

- Ensure the **Documents** screen is displaying for the Client
- Locate the **Draft** document (Version 1 etc.)
- Click

The **Document Upload** screen will display

- **File:** Click the Browse button and locate the updated file that you saved
- **Author*:** Auto completes with original author name, amend if required
- **Document Title:** Auto completes with original document name
- **Document Date:** Enter required date
- **Document Type:** Auto completes
- **Description:** Enter if required

At this point you can either resave this as a Draft Document or Final Version

- Click **Draft Version** ⦿ radio button and follow the **Uploading Draft Documents** process until the document reaches its final version

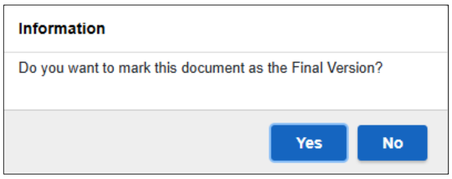
Saving a Final Version

Follow the instruction for Updating a Draft Documents, but select the Final Version radio button instead of Draft Version

- Click the **Final Version** ⦿ radio button
- Click the **Upload Document** button Upload Document (bottom)

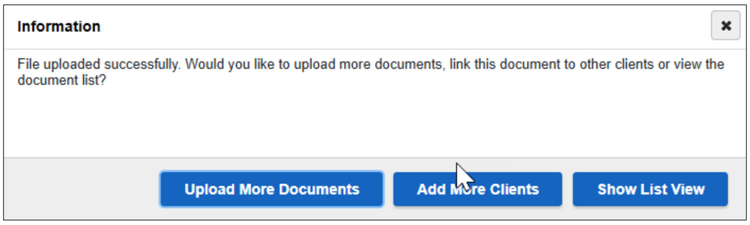
An **Information** prompt will display asking if you want to mark this document as the Final Version?

- Click **Yes**



A second **Information** prompt will display telling you the file was uploaded successfully and asking if you would like to upload more documents, link this document to other clients or view the document list?

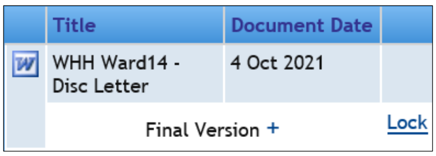
- Click **Show List View** to open the **Documents** screen and view the Client's documents



The Final Version will now display in the pane to the left of the screen

The document will no longer display the green plus icon but you will see a small plus next to the Final Version +

- Click the **name of the document** to view the Final Version of the document

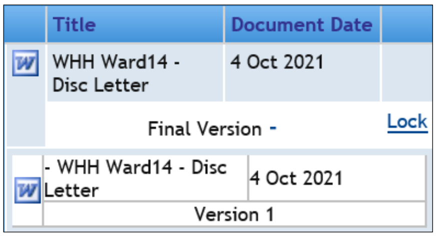


To see information or view previous versions

- Click the **small plus +** next to Final Version

Information about the previous versions will display with the Version numbers (Version 1, 2, etc.)

- Click the **name of the document** to view the previous version of the document



Patient Engagement Portal (PEP) & Shared Care Record

Please note that some document types will allow documents to be shared with patients via the Patient Engagement Portal (PEP) or more widely with other Healthcare Professionals via the Shared Care Record.

A note of these specific document types can be found in the Trust Document Naming Convention.