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Overview

Documents can be automatically generated from templates stored in Rio and uploaded and saved in the Patient record. Emails and other electronic documents (typically scanned and saved) can also be uploaded to the Patient's record.

Creating a Letter from a Rio Template

- **Search** for the Patient and open their **Clinical Portal – Client's View**
- Locate the **Navigation** pane (right)
- Click **CR – Documents** folder
- Click the **Edit and Print Letters** link

The **Create Letter** screen will display

- **Letter Type:** Select as required
- Click **Create**

Microsoft Word will open with the Letter Template infilling the Patient's details (the letter does not print at this stage)



- **Amend** the letter if required
- Click the **DropZone** tab (top)
- Click the **Send to Rio** button

The Rio DropZone dialogue box will open, you will need to name the document to save it in Rio. **This must follow** the Trust's Naming convention which ensures us easier access to retrieve the document.

Document Details

- **Title:** As per naming convention (see **Naming Convention** section)
- **Final Version:**
- **Send to GP:** Tick if required (see **DocMan** section)
- **Description:** Brief description of content
- **Document Date/Time:** Today & Now
- **Type:** Type of Document
- Click **OK**

The **File Uploaded** message displays

- Click **OK**

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

DocMan

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

To use DocMan the following must be true:

- The Patient must have a **GP** recorded in their Rio record
- The Patient must have an **NHS number** recorded in their Rio record
- A '**Type**' of **BCHC Admin** or **BCHC Clinical** must be selected

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
- Click the **OK** button

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

Naming Convention

The Trust Naming Convention supports staff by providing a succinct format for all documents which are uploaded to Rio. This means documents from a specific division, service or team can easily be identified.

All **Community Services** documents should be named using the following format:

Division Initials **Space** **Service Abbreviation** **Hyphen** **Brief Descriptor**

Examples

A first appointment letter from Podiatry would be: A PODI-1st Appt Letter

To break that down, A=Adults division, PODI is the abbreviation for Podiatry and 1st Appt Letter briefly describes the document

A discharge letter from the Aston District Nursing team would be: A IMT Aston-Disc Letter

Test results uploaded by the Aston Health Visiting would be: C HV Aston-Test Result

All **Inpatient Services** should be named using the following format:

Location Abbreviation **Space** **Ward** **Hyphen** **Brief Description**

Examples

A discharge letter from Ward 7 at Moseley Hall would be: MHH Ward 7-Disc Letter

To break that down, MHH = Moseley Hall Hospital, Ward 7 is the ward uploading the document and Disc Letter describes the document

Test Results uploaded from the Ward 14 at West Heath Hospital would be: WHH Ward14 – Test Results

Further information regarding the Trust's Naming Convention can be found on the Trust Intranet



Uploading Documents

A variety of document types including Microsoft Word, pdf's, image files and emails can be uploaded and saved to the Patient's record in Rio.

Documents can be uploaded via the Clinical Portal or via the Upload Document link found when associating documents with Progress Notes and Referrals in Rio.

Accessing from the **Clinical Portal – Client's View**

Locate the **Navigation** pane (right)

- Click the **CR – Documents** folder
- Click the **Document Upload** link

The **Document Upload** screen will display

The screenshot shows a web form for uploading a document. The fields are: File (W:\BCHC\Informatics\IT Training and Business Change), Author* (Dr Smith), Document Title (MHH Ward 4-Disc Letter), Document Date (20 September 2021), Document Type (BCHC Admin), and a Description text area. At the bottom, there are radio buttons for Draft Version and Final Version (selected).

- **File:** Click the **Browse** button
 - Locate and select the required document
- **Author*:** Enter name of author
- **Document Title:** As per naming convention (see **Naming Convention** section)
- **Document Date:** Enter date/time
- **Description:** Enter if required
- Click **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 what 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 Patient's documents



Viewing Documents

Accessing from the **Clinical Portal – Client’s View**

Locate the **Navigation** pane (right)

- Click the **CR – Documents** folder
- Click the **Document View** link

The **Documents** screen will display

The list of documents will display to the left of the screen

These will appear in Document Date Order and grouped by Division & Service.

| BCHC Clinical | | | |
|---------------------------------|-----------------------------|---------------|----------------------|
| Show Date Added | | | |
| | Title | Document Date | |
| | A-Inpt Consultant Letter | 23 Sep 2021 | |
| | Version 1 | | Lock |
| | A-Inpt Discharge | 23 Sep 2021 | |
| | Final Version | | Lock |
| | CF HV-Antenatal Appointment | 6 Nov 2020 | |
| | Final Version | | Lock |

- Documents can be **filtered** by **Type** using the **dropdown** (top)
- Documents can **sorted** by **Title** or **Document Date** by clicking on the **column headers**
- Click on a document to open and view the document and to expand the document details

Uploading Documents via Progress Notes & Referrals

Locate the **Associated Documents** to the bottom of the Progress Note or Referral

| Associated Documents | | | |
|---------------------------|------|-------|--|
| Date | Type | Title | |
| -No Documents Associated- | | | |

- Click the **green plus**

The **Set Associated Documents** window will open

- Click the **Upload New Document** link (bottom)
- **File:** Click the **Browse** button
 - Locate and select the required document
- **Author*:** Enter name of author
- **Document Title:** As per naming convention (see **Naming Convention** section)
- **Document Date:** Enter date/time
- **Description:** Enter if required
- Click **Final Version** radio button
- Click the **Upload Document** button [Upload Document](#) (bottom)



The document will display below any existing documents

- Click **Done**

The document details will now display below the Progress Note or Referral

- Click **Save**


The document can be viewed in the **Documents** screen

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 but 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  (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 what 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 Patient'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.



Draft Document View

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

The example to the left shows Version 1

| | Title | Document Date | |
|---|--------------------------|---------------|---|
|  | A-Inpt Consultant Letter | 23 Sep 2021 |  |
| | Version 1 | | Loc |

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 Patient
- Locate the required draft document
- Click the **Title** of the document

The **Document Description** will display in full


You may be prompted to **open** the document

- If you are not prompted to open the document, click the **Save locally** link

A prompt will then display at the bottom of the screen allowing you to Open or Save the document

- **Save** the document to the required folder and make any changes and resave

The amended document can now be uploaded into Rio

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

The **Document Upload** screen will display

- **File:** Click the Browse button and locate the updated file
- **Author*:** Auto completes with your name, amend if required
- **Document Title:** Auto completes with original document name
- **Document Date:** Enter required date
- **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  (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 what 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 Patient'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



| | Title | Document Date | |
|---|--------------------------|---------------|----------------------|
|  | WHH Ward14 - Disc Letter | 4 Oct 2021 | |
| | Final Version + | | Lock |

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 information to view the previous version

| | Title | Document Date | |
|---|----------------------------|---------------|----------------------|
|  | WHH Ward14 - Disc Letter | 4 Oct 2021 | |
| | Final Version - | | Lock |
|  | - WHH Ward14 - Disc Letter | 4 Oct 2021 | |
| | Version 1 | | |