

Contents

Overview	
Creating a Letter from a Rio Template	1
DocMan	2
Naming Convention	3
Uploading Documents	4
Viewing Documents	5
Uploading Documents via Progress Notes & Referrals	5
Saving Draft Documents	6
Draft Document View	7
Updating a Draft Document	7
Saving a Final Version	8

Overview

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

Creating a Letter from a Rio Template

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

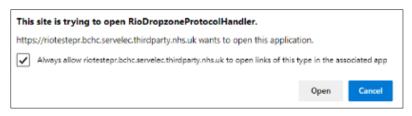
The Create Letter screen will display

• Letter Type: Select as required

Click Create

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

You may see this message the first time you create a letter:



Place a **tick** in the checkbox and click the Open button.

You will not see this message after the first time.





■-

Version: 3.2.0.29

- · 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 easier access to retrieve the document.

Document Details

• **Title:** As per naming convention

(see Naming Convention section)

Final Version: ⊙

Description: Brief description of content

Document Date/Time: Today & Now

Type: Type of Document

Send to GP: Tick if required

(see **DocMan** section)

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 Client's record.

DocMan

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 Client must have a GP recorded in their Rio record
- The Client must have an NHS number recorded in their Rio record
- BCHC Admin or BCHC Clinical must be selected in the Type field

If the above are in place, then the **Send to GP checkbox** will display to the top right



DropZone

Final Version (a)

09 September 2021 10:33

Draft Version (

Description:

Document

Туре

About

Document Details

Cancel





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

The document will be saved to the Client's Rio record and an electronic copy of the document will be sent to the Client'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: ACS PODI-1st Appt Letter

Therefore, ACS = Adults Community Services division, PODI = Podiatry, 1st Appt Letter = 1st Appointment Letter

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

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

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

Location Abbreviation Space Ward Hyphen Brief Descriptor

Examples

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

Therefore, MHH = Moseley Hall Hospital, Ward 7 = ward uploading the document, Disch Letter = Discharge Letter

Test Results uploaded from 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 Client'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 screen

Locate the **Navigation** pane (right)

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



The **Document Upload** screen will display

File: Click the Choose File button

Locate and select the required document

• Author*: Enter name of author of the document

Document Title: As per naming convention (see Naming Convention section)

Document Date: Enter date

Document Type: Select as required

Description: Enter if required

Click Final Version ⊙ radio button

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 giving you options 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





Viewing Documents

Accessing from the Clinical Portal – Client's View screen

Locate the **Navigation** pane (right)

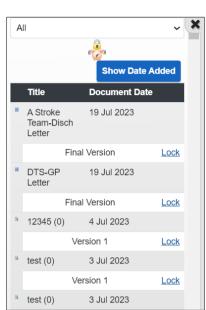
- Click the CR Documents folder
- Click the **Document View** link

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.

- 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** section to the bottom of the Progress Note or Referral screens

Click the green plus **

The **Set Associated Documents** window will open

Click the Upload New Document link (bottom)

• File: Click the Choose File button

Locate and select the required document

• Author*: Enter name of author of the document

• **Document Title:** As per naming convention (see **Naming Convention** section)

• Document Date: Enter date/time

Description: Enter if required

Click Final Version ⊙ radio button





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 O 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 giving you options 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.



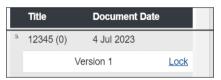


Draft Document View

Draft documents will display with the Version number in the Documents screen.

The example to the left 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

You may be prompted to open the document

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

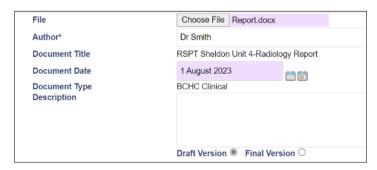
A prompt will then display at the top of the screen allowing you to Open or Save the document

• 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 Client
- Locate the **Draft** document (Version 1 etc.)
- Click the green plus **

The **Document Upload** screen will display



• File: Click the Choose File button and locate the updated file

Author*: Auto completes with the original name, amend if required

Document Title: Auto completes with original document name

• Document Date: Enter required date

Document Type: Auto completes with original document type

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 giving you options 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, instead you will see **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





