# Inpatient Documents

## Contents

## 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 **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 Client's details (the letter does not print at this stage)

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

**This site is trying to open RioDropzoneProtocolHandler.**

https://riotestepr.bchc.servelec.thirdparty.nhs.uk wants to open this application.

☑ Always allow riotestepr.bchc.servelec.thirdparty.nhs.uk to open links of this type in the associated app

Open       Cancel

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

You will not see this message after the first time.

- **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

- 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
- 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

## 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

| | All | |
|---|---|---|
| **Title** | **Document Date** | |
| A Stroke Team-Disch Letter | 19 Jul 2023 | |
| | Final Version | Lock |
| DTS-GP Letter | 19 Jul 2023 | |
| | Final Version | Lock |
| 12345 (0) | 4 Jul 2023 | |
| | Version 1 | Lock |
| test (0) | 3 Jul 2023 | |
| | Version 1 | Lock |
| test (0) | 3 Jul 2023 | |

## Uploading Documents via Progress Notes & Referrals

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

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

  o   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

- 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 **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.

| Title | Document Date | |
|-------|---------------|---|
| 12345 (0) | 4 Jul 2023 | |
| | Version 1 | Lock |

## 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 | Choose File  Report.docx |
| Author* | Dr Smith |
| Document Title | RSPT Sheldon Unit 4-Radiology Report |
| Document Date | 1 August 2023 |
| Document Type | BCHC Clinical |
| Description | |
| | Draft Version ⦿  Final Version ○ |

- **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  (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