Electronic Document and Records

Management System (EDRM)

Patient Electronic Record Module

User Guide

1   Contents

2 Revisions and Distribution

Revision	Summary of Changes	Author	Date
0.1	Initial creation of document	Paul Glock	03/07/2015
0.2	Update for 4.1.134	Paul Glock	14/08/2015
1.1	Updates for Timeline in 4.1.135	Paul Glock	27/08/2015
1.2	Updates to Recent Activity	Paul Glock	02/10/2015
1.3	Update for List View	Paul Glock	02/10/2015
1.4	Update for Case Notes View	Paul Glock	05/10/2015
1.5	Check & proofread (User Guide only)	Ann Wrightson	14/10/2015
1.6	Add Case Notes Filters	Collins Manna	29/01/2016
1.7	Update for case notes filters	Collins Manna	29/01/2016
2.0	Update screen shots to version 4.2	Jon Waight	03/10/2017
2.1	Updates to new functionality Timeline, Language	Sarah Butler	21/11/2017
2.2	Update to new v4 functionality	Michael Robertson	12/12/2017
2.6	General content and grammatical update	Andrew Phelps	07/02/2018
2.7	Alert Summary Window	Manish Panchmatia	19/04/2018
2.8	Workflow Status update / Screenshots updated	Michael Renwick	09/10/2018
2.9	Video file support added	Michael Renwick	12/10/2018
3.0	Timeline updated	Michael Renwick	25/10/2018
3.1	Break Glass Update	Michael Renwick	01/11/2018

3   Introduction

The purpose of this document is to describe the Electronic Health Record (EHR) module within the CCube EDRM solution. This document is part of the overall CCube EDRM documentation;

(1) User Guide – The user guide explains how an end user can use the system. This describes configurations that may exist within a typical deployment. Customers are welcome to extract parts of this document to use within localised training documentation.

The EHR module forms part of the main user interface to a patient record, which provides facilities to find and view all documents in the record whether scanned or created electronically (such as letters and eForms). The display is configurable to support different users.

4 User Guide

The Patient Record can be opened from various other modules within the EDRM system. It is not possible to display a patient record without first having selected the patient elsewhere. The patient can be selected from any of the following modules;

- Patient search
- Appointments
- Pre-Admissions/In-Patient

For details on how to navigate and select a patient in those modules please refer to the corresponding module user guide.

4.1 Patient Record Display Structure

When a patient record is opened, the screen typically (subject to site configuration) contains three panels in addition to the blue menu bar at the left hand side of the screen.

Depending on configuration settings your patient screen may start out looking like the screen below, you can simply select the word "search" in the top left hand corner to expand your search options.
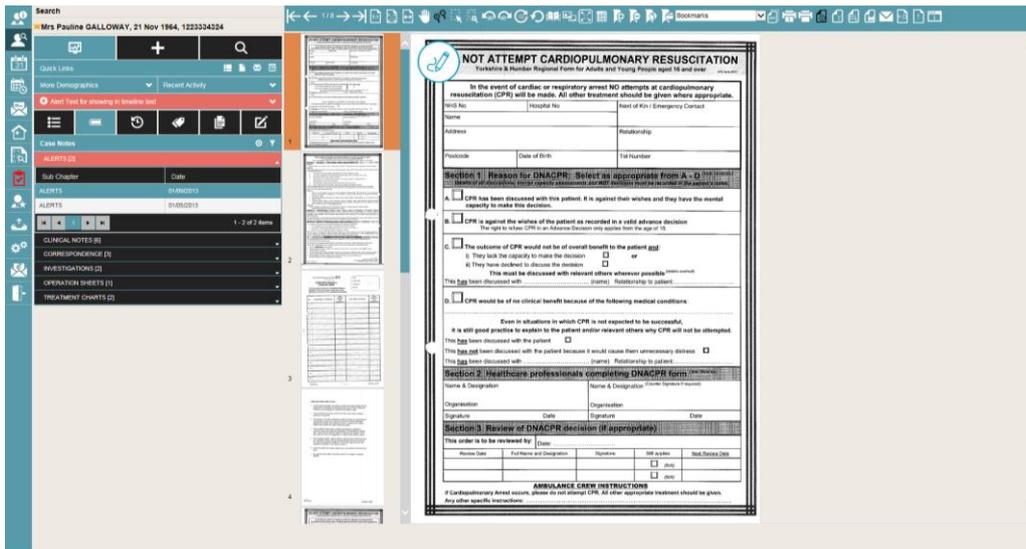
The record navigation and search functions are split into 4 distinct areas: this Guide covers the EHR (Electronic Health Record) functionality, shown in the below screen shot as an ECG Monitor display;
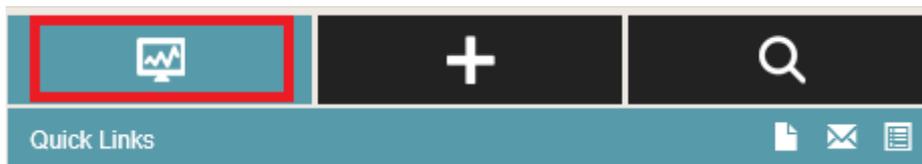
The EHR (Electronic Health Record) functionality provides a number of summary views of the content of a patient record. The usual default appearance is as follows:
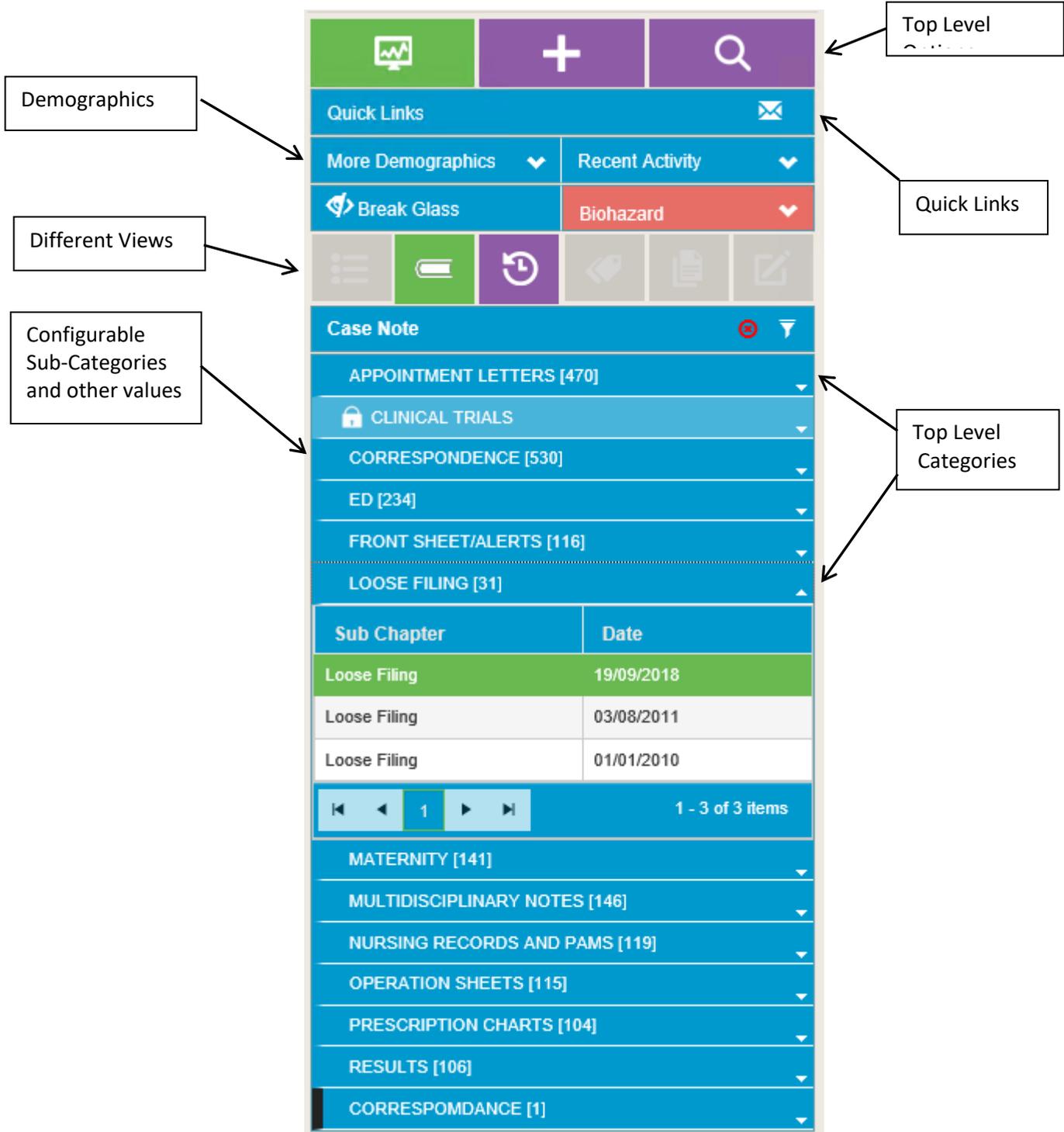
ccube solutions

Top Level
Options

Demographics

Quick Links ✉

| More Demographics ⌄ | Recent Activity ⌄ |

Quick Links

⟨⟩ Break Glass   Biohazard ⌄

Different Views

Configurable
Sub-Categories
and other values

Case Note   ⊗ ▼

| APPOINTMENT LETTERS [470] ⌄ |
| 🔒 CLINICAL TRIALS ⌄ |
| CORRESPONDENCE [530] ⌄ |
| ED [234] ⌄ |
| FRONT SHEET/ALERTS [116] ⌄ |
| LOOSE FILING [31] ⌃ |

Top Level
Categories

Sub Chapter	Date
Loose Filing	19/09/2018
Loose Filing	03/08/2011
Loose Filing	01/01/2010

| ⏮ | ◀ | 1 | ▶ | ⏭ | 1 - 3 of 3 items |

| MATERNITY [141] ⌄ |
| MULTIDISCIPLINARY NOTES [146] ⌄ |
| NURSING RECORDS AND PAMS [119] ⌄ |
| OPERATION SHEETS [115] ⌄ |
| PRESCRIPTION CHARTS [104] ⌄ |
| RESULTS [106] ⌄ |
| CORRESPOMDANCE [1] ⌄ |

4.2 Demographics Display

Three identifiers of the demographics will appear within a summary section of the record:

Title, forename and surname, date of birth and their NHS number

☆**Mrs Pauline GALLOWAY, 21 Nov 1964, 1223334324**

Clicking on the "More demographics" tab

More Demographics ˅

will   show additional information;

Less Demographics	˄	Recent Activity	˅
Sex		Female	
Hospital Number		06297ZZ	
Middle Name			
Address		15 Time Training Training Training PP1 PP1	
G.P		No GP Available	

When a patient is marked as deceased a "Deceased" indicator will appear above the demographic panel.

☆**Mrs Pauline GALLOWAY, 21 Nov 1964, 1223334324**

DECEASED

Quick Links

Less Demographics	˄	Recent Activity	˅
Sex		Female	
Hospital Number		06297ZZ	
Middle Name			
Address		15 Time Training Training Training PP1 PP1	
G.P		No GP Available	

When the patient has no documents a message will appear indicating this;
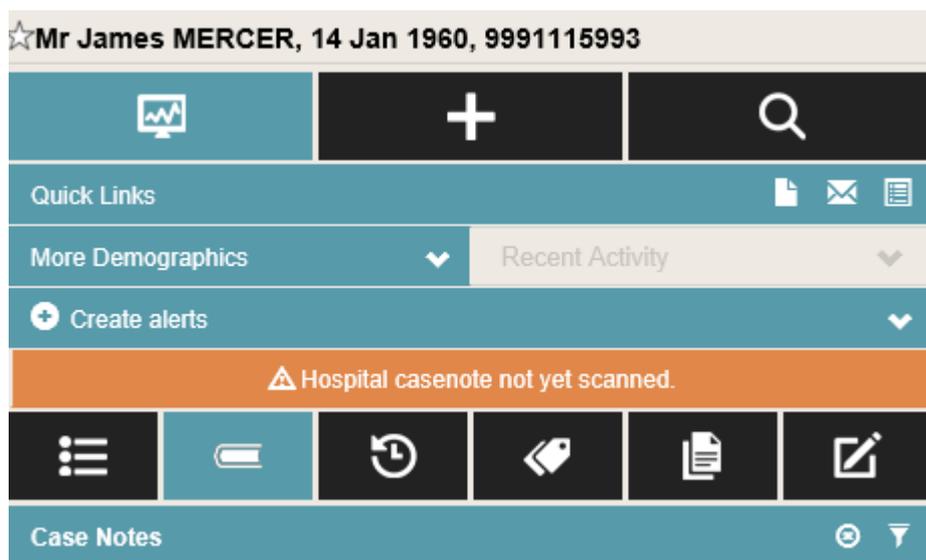
4.3 Alerts

When a patient is first viewed, if the user has permission to see alerts and there are active alerts present, those alerts will be displayed in a pop-up window before the patient details are displayed;
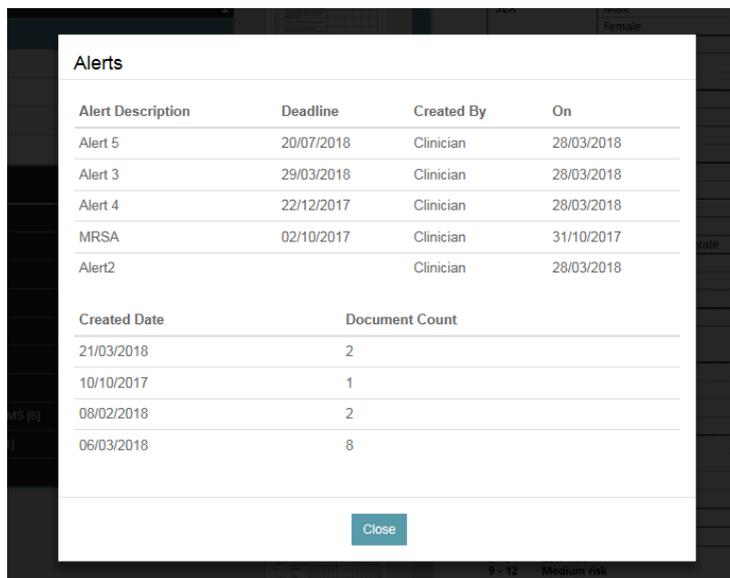
Click "Close" to proceed or click on a document alert to open any corresponding document.
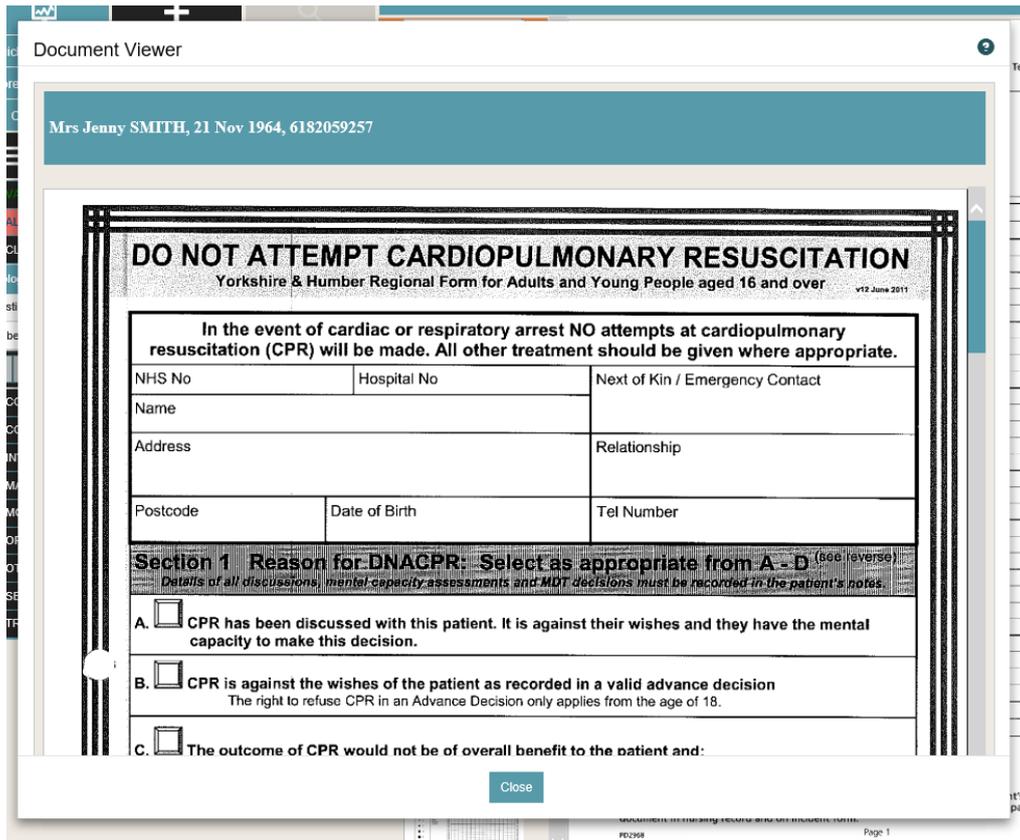
The alert viewer allows to quickly see a document relating to an alert. The user is able to scroll through the document, using the scrollbar or 'Close' the quick viewer. When closing the alert viewer, the previous 'Alert Summary' window will open.

Click 'Close' to close Alert Summary window. The patient Electronic Health Record will then be displayed.

The Alert Summary window will not appear again for the same patient, until the user logs out and back in. Alternatively, during a patient search the user can simply click the Alerts icon.
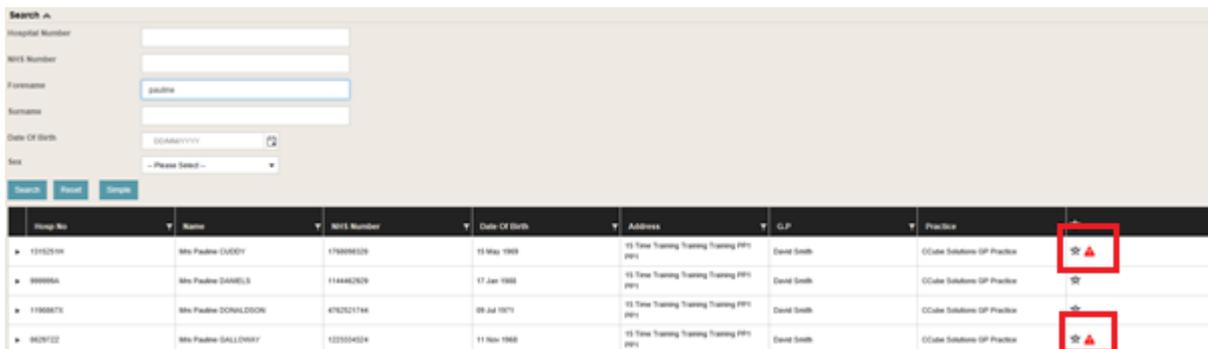
This can be found in the additional options section.

4.4 Recent Activity

The recent activity window will appear when a patient has documents that are not finalised. This is provided for eForms and Letters.

By default the Recent Activity window will appear expanded. The expand and collapse control can be used to alter the display:
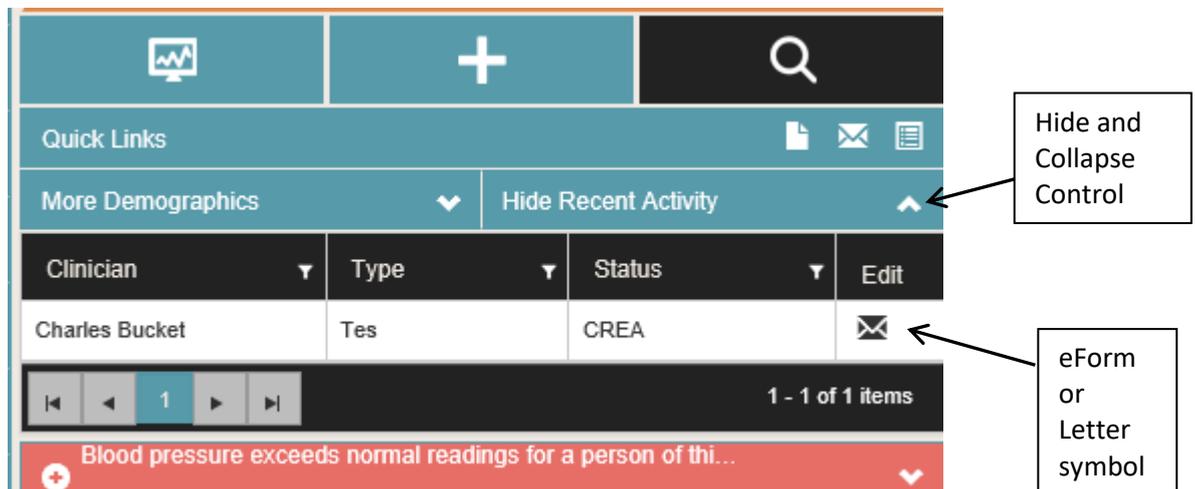
When a patient with these documents is viewed the recent activity screen will appear displaying separate lists for the eForms and Letters.

The user can select the row to open the letter or eform in read only view or click on the edit icon to make amendments.

4.5 Break Glass

"Break Glass" is a general term used to describe the process of requesting access to documents that would otherwise be restricted. This is to enable access to documents where there is an urgent clinical requirement.

Top level categories can be configured so users have to use the Break Glass feature in order to view documents in those categories. The Break Glass option will only appear when documents are present that cannot be seen or opened by the user.

A record that has restricted access will be shown with a padlock icon adjacent to the locked category name, as seen below.

Clicking on the break glass padlock icon will prompt the user to type in a reason and their password;

Then click "BREAK GLASS" to unlock the protected case note categories.

The system administrator is then notified and the restricted categories will be unlocked. Documents in the restricted categories can then be viewed.
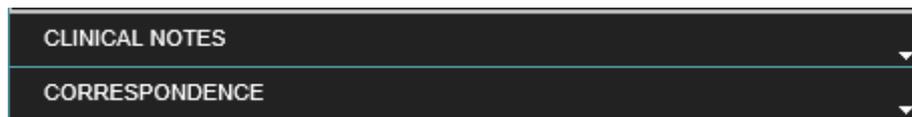
4.6   Case Notes

The case notes tab is ordinarily the default display when a patient record is opened. It shows all categories visible to this user, and orders the categories alphabetically.
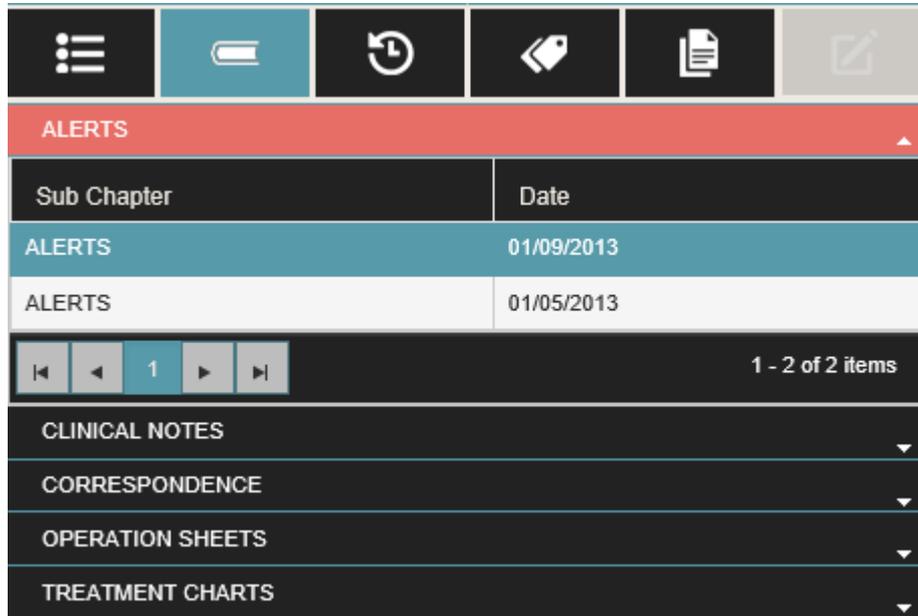
Default Loading (Alphabetically)

4.6.1   Case Note Display Structure

When viewing a case note document category, the appearance will be as indicated below.

The sub-category and scan date will appear in the view. The user can use the paging buttons at the bottom of the view to scroll to subsequent pages;
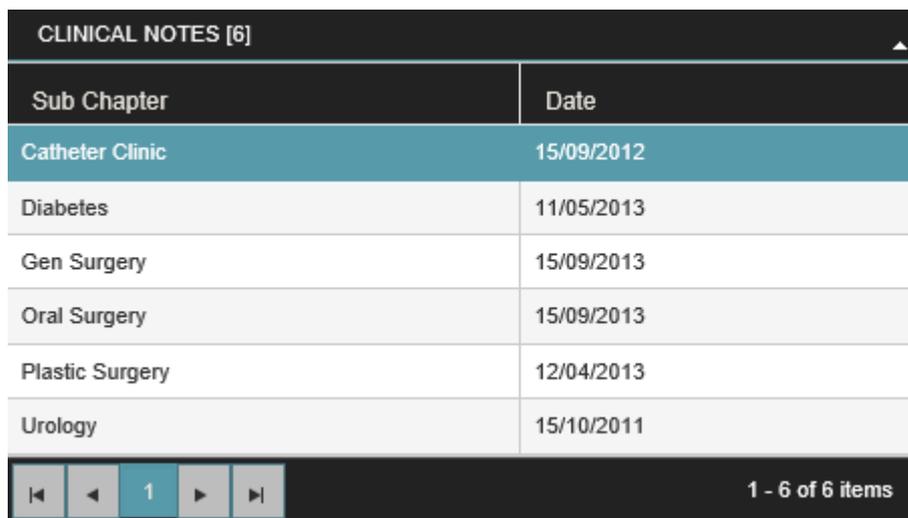
4.7   Timeline

The Timeline gives a different view of the documents grouped into 6 time bands. The date ranges shown in each column can be adjusted by a System Administrator.

Expanding the Categories reveals the Sub-Categories which can be further expanded to display document dates.

Clicking on the top Category node will display the sub-categories.
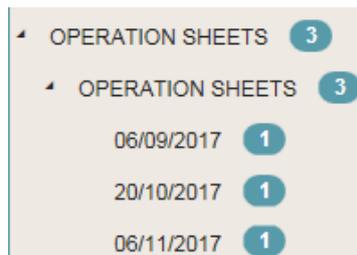
Clicking on the Sub-Category node will display the creation dates for documents in that sub-category.

When a Document Date is selected the timeline will collapse and the viewer will appear.

Clicking on the Expand box at the right of the timeline tab will expand the timeline back to full screen.

Navigation between the timeline segments can be done by clicking on the arrows at the top of the timeline.

Navigation between timeline segments

Option to expand to full view
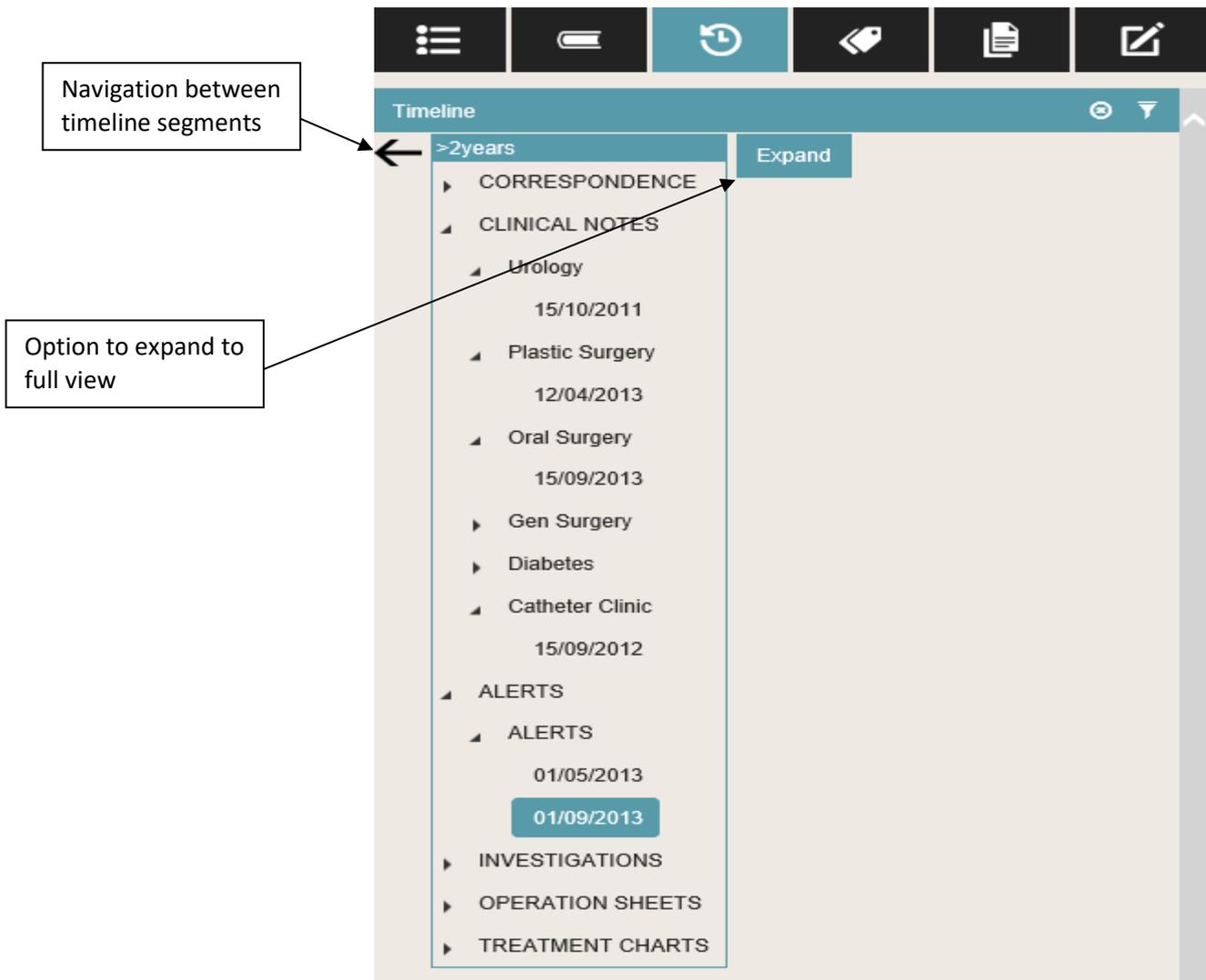
Within a segment a user can select to display documents at the category, sub-category or document level

Category Level   Sub-Category Level   Date Level