

Scottish Care Information

SCI Store

# **Release information catalogue**

Updated for SCI Store Release 7.0

Version 1.0 20/01/2011

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# Introduction

## **Intended Audience**

This document is intended for SCI Store Administrators and anyone who has an interest in the functionality contained within each version release of SCI Store

## Purpose

The purpose of this document is to provide an overview of the functionality contained within each release of SCI Store. In addition, the information provided will also detail how the functionality is configured and implemented within a live environment, and will detail how it should be used by the end users.

## 1. Version 5.0

## 1.1 Link from external applications

#### Background

This change request is to link seamlessly from a patient record in one system to the corresponding patient record in SCI Store. For example link from a patient record in a GP system directly to the patient record in SCI Store.

The NHS Scotland eHealth Design Authority confirmed that the strategic aspect of this feature would be delivered by the National Identity Management solution. In advance of the national identity management solution the SCI Store project team have developed a solution that provides a generic mechanism to go directly to patient details. Once the identity management solution is implemented, the login form (see step 3 in functional overview) will be bypassed.

#### **Functional overview**

Patient details in SCI Store can be accessed directly using a URL:

•

http://localhost/StoreWeb/Restricted/patient/findpatient.aspx?patientidentifier=120 7677558

The application path of the URL should be changed to match your local implementation.

Scenario:

#### Main flow

Step 1: (User): Selects URL (from within external application)

Step 2: (SCI Store System) Navigates to SCI Store login page

Step 3: (User) Enters login details

Step 4: (SCI Store System) perform a find patient using the "patientidentifier" (CHI number) in the URL.

Step 5 (System) An exact match is found and the system navigates to patient details view for the specified CHI Number

#### Alternate flows

Step 2a: (SCI Store System) Identifies that the user is logged in (and the session timeout has not been activated). Login details are not required.

Step 5a: (SCI Store System) identifies that more than one match is found and navigates to the FindPatient search results grid and displays a list of matching patients.

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# 1.2 User Friendly name on audit screen

Background

The patient audit screen shows what SCI Store user has accessed a patient's details. These details can be viewed by selecting the "Audit" tab in the patient details view.

In SCI store version 5.0 a user "Friendly name" column has been added to the grid. In addition to the existing 'Username' and 'ProcessedAt' time.

The change allows lab staff and admins to contact the relevant person if they've viewed a wrong result for example. The username on its own is not enough to locate an actual user.

#### **Feature Summary**

New "User friendly" name column added to the patient audit grid. The column heading reads "Full Name".

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### **1.3 User Session timeout**

#### Background

SCI Store version 5.0 provides a feature for a SCI Store administrator user to set an inactive user logout duration that is specific to a user-account or a user-role. This means that an end user can have varying durations for an inactivity logout specific to the role they perform.

**Note-:** NHS Scotland health boards must obtain guidance and approval from their local IT security officer before configuring custom inactive user logout values.

A healthcare professional may refer to SCI Store when in consult with a patient. This means that they may have to log in to SCI Store several times because the inactive user logout has been triggered. This can happen when the clinician is examining the patient. It is perceived that consult period is unnecessarily lengthened.

This change will save clinicians valuable time as they will not have to repeatedly login to the system and give their full attention to patient care.

#### Feature Summary

The existing system-wide setting has been established as a default setting. A custom inactive user logout can now be defined separately (See Fig. 1). The custom setting can be applied to individual user accounts. The custom setting will override the default setting. In addition, the custom setting can be applied at user role level – also superseding the default setting.

Key concepts:

0

- Concept of "default" and "custom" inactive user logout values 0
  - View / Edit an inactive user logout value for:
    - User-account .
    - User-role
- View / Edit minimum and maximum values for the custom inactive user logout 0
- Audit log and report of changes to inactive user logout  $\cap$



Fig. 1: Default and custom inactive user logout concept

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#### 1.4 Manual CHI Lookup

#### Background

These changes are intended to assist an administrator with the process of verifying that CHI numbers are correct for results that come in with old addresses.

#### **Functional overview**

Changes made to the CHI Lookup Search Page (CHIHome.aspx) [Search form]

#### No changes

Changes made to the CHI Lookup Search Page (CHIHome.aspx) [Search results grid]

1) A 'postcode' column has been added as the last column to be displayed from the returned search list. The width of other columns has been adjusted to ensure that no horizontal scrolling occurs.

2) The system will cache the list of patient search details returned. (Note: This cached list will be displayed when the user returns to this page from the 'Return to Previous Page' icon from "CHIResult.aspx" or the breadcrumb trail.

Changes made to the CHI Lookup Details Page (CHIResult.aspx)

3) Previous names and previous addresses (returned from the CHI) have been added as two new rows underneath the GP Practice.

4) 'Return to Previous Page' icon on the CHI Patient Details page added to the standard toolbar.

5) Two new module permissions added for the 'Save to Store' and 'Test' buttons on the CHI Patient Details page. The display of these buttons will be dependent on the value of the module permissions.

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## 1.5 Combined view of results and documents (Tree View)

#### Background

The web application views are separate for results and documents. This means that it can take more time to get a complete picture of all data held for a patient in SCI Store. This has particular relevance to patients that have many results and document. This change would provide the business with a combined view of all data types held for a patient in SCI Store.

#### In Scope

1.) Display the number of documents\reports at each node in brackets.

2.) Change the name of the root tree view to something other than "Documents". (Suggestion: User the patient's name as the root node? If possible, change the icon from a folder to a suitable patient one – e.g. an avatar-like image.)

3.) Include the plus and minus signs for expanded nodes

4.) Remove all "Date" node levels (As date is shown in grid)

5.) Visual indicator to show the relationship between the selected node and the items listed in the gird view. (E.g. described as "Active node")

6.) Ensure that the hierarchy state is maintained when navigating to and from the result / document metadata details. The user must be able to navigate back to the exact hierarch position that they navigated away from when they selected a result / document.

9.) Shorten the header descriptions in the grid view to remove the word "Document"

10.) The grid view must be paginated in accordance with the current SCI Store UI style guide.

11.) User should be able to sort all grid columns in both ascending and descending order.

12.) In the grid view implement the colours used for displaying reports in the results grid. (Implemented but required further discussion with customer)

13.) In the grid view add an icon to "view document" and "view cumulative reports"; these should be displayed in the same column.

14.) In the grid view add "document notes" and "report notes" (Links)

16.) On focus, sort the grid view according to system setting default results sort order (confirm that this can be set for documents too)

17.) For documents: show ("Attestation date")

18.) For lab results: Date reported ("ReportDateTime")

19.) Ensure "breadcrumbs" are configured in accordance with the current SCI Store UI style guide.

#### <u>System</u>

20.) Ensure datasets are passed through the secure dataset routines

#### Out of scope

21.) Include all tabs on the patient details screen in the tree view. (It was decided this was outside the scope of the current piece of work and could possibly included at a later date if requested by users)

7.) Ability to expand all nodes of the hierarchy within one user input action (to be confirmed by customer if still needed; the root node lists all)

8.) Establish a discipline node as a subsequent child to the sub-category node based on Report type for labs and "Document specialty" for documents. These categories list all the "ologies" that a clinician may want to filter on (to be confirmed by customer).

15.) All documents and lab results must be listed in the grid view when the root node is selected in the hierarchy. (This is assumed to meet the "expand all" requirement, [list item 7] to be confirmed with customer).

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## 1.6 Duplicate patients caused by CHI Lookup

#### Background

The CHI Lookup capability in SCI Store is used to retrieve the correct CHI information from the National CHI and to rectify 'old' CHI numbers that have come from hospital PAS systems.

The information being retrieved from the CHI lookup will always return the 'UPI' CHI number. If this number differs from the 'old' CHI number supplied by the hospital 'PAS' system the matching rules in SCI Store are not being applied correctly and causing the creation of duplicate patients on SCI Store.

This change means that the matching rules in SCI Store will always be applied correctly against the 'UPI' CHI Number. This will stop the creation of duplicate records on SCI Store.

A duplicate record can be created in SCI Store when:

- A file is sent to Store containing patient details that include a redundant CHI Number
- The patient fails to match against any other patient in Store so an "Insert" action is assigned.
- The "Insert" matching rules being used contains an Automatic CHI Lookup. The CHI finds a match but sends back a record containing the "Current" CHI number.
- This CHI patient with the "Current" CHI number does have a match on Store, but because "Insert" action has already been set this patient is inserted as a new patient instead of updating the matched patient.

#### **Feature Summary**

1) Prior to the matching rule logic being applied to the data contained in the incoming file the system will:

- Check if the Patient Matching Rule assigned to this interface contains 'Automatic CHI Lookup' rules.
- If 'Automatic CHI Lookup' rules exist then the system will call the 'ValidateCHINumber' function.
- The ValidateCHINumber" function will call the CHI Web Service with the patient details provided in the file and return the 'current' CHI Number.
- If the 'ValidateCHINumber' function has been called then use the 'current' CHI Number returned from the CHI Web Service when applying the matching rules, otherwise use the CHI Number supplied in the file.

2) If the CHI number supplied in the file differs from the 'current' CHI Number it will be saved as an historic patient identifier.

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## 1.7 Improve security questions usability

#### Background

Reported that the security questions workflow process was lacking, and subsequently rarely used, improvements have been made to this area in SCI Store v5.0. The changes will make it easier for a user to reset their own password and provide time-saving benefit to the system administrator – as they do not have to resolve as many password issues from helpdesk calls.

#### **Feature Summary**

When the user selects the "forgot password" link from the login screen the three questions are now arranged on a single screen. (This is in contrast to the user being

forced to navigate through several screens before finding out if they are successful or not).

The help text in "maintain user questions" has been changed:

| Old Text  | Revised text  |
|---|---|
| "Please note that the answers are saved<br>exactly how they are entered. Consequently,<br>when you are resetting your password you<br>must enter your answers exactly as you have<br>done in this screen" | Important! Your answers are "cAsE<br>sEnSitiVe". Please memorise your answer<br>with regard to any UPPER or lower case<br>letters used. |

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## **1.8 Mapping audit report**

#### Background

In SCI Store v5.0 (From build 4.1.0844), there is a feature that allows an administrator to control the processing of incoming files that have mapping errors.

This feature is implemented for two mapping areas:

- Result set
- Test result

This mapping audit feature is controlled by the "ResultMappingMethod" system settings. The two possible values are:

- Create Exception;
- Audit Mapping

User Access to this feature is controlled via Scheme Code Maintenance permissions.

When "Create exception" system setting value is selected, the system operates as it did prior to SCI Store Version 5.0. This means that reports are rejected and placed into exceptions if no translation can be made between the incoming data and required standard code scheme.

If "Audit mapping" is selected, and a mapping error is identified, the file is parsed and an entry is created in the mapping audit report.

#### Feature Summary

The mapping audit report is accessed from the "Exceptions Mgmt." menu.

Below is a screenshot of the Mapping Audit Report view. This report is only populated when the "Result Mapping Method" system setting value is "Audit mapping".

The Mapping Audit report shows all "Active" (or unresolved) mapping issues for parsed files.

(Note: Historical log entries are retained in the database but are not visible).

| × 4        | C Mapping Au    | dit Report  |                        |           |             |                           |                 |              |                     |                              | ige • 😳 lõos • 🚳 • 🐼 🚸 🔛      |
|------------|-----------------|-------------|------------------------|-----------|-------------|---------------------------|-----------------|--------------|---------------------|------------------------------|-------------------------------|
| Ser SCI    | Store Pa        | aisley      |                        |           |             |                           |                 |              |                     | My Setti                     | ngs About Store Log Out       |
| Home       | Find Patient    | Find Result | Find Document Fi       | nd on CHI |             |                           |                 |              |                     |                              | Patient ID: Go                |
|            |                 |             | Configurati            | ion Exce  | ptions Mgmt | Security                  | Maintenance     | Reporting    | j General           | Notifications                |                               |
| Home > №   | lapping Audit R | eport       |                        |           |             |                           |                 |              |                     |                              | User: admin on PJSSCI6        |
| \$         |                 |             |                        |           |             |                           |                 |              |                     |                              |                               |
| Search C   | Options Sear    | ch Clear    | 13 Records Returned    | i         |             |                           |                 |              |                     |                              |                               |
| Date From  | m               | *           | Parsed Time            | Report ID | Name        | СНІ                       | Mapping<br>Type | From<br>Code | From<br>Description | From Scheme                  | To Scheme                     |
| Date To    |                 | *           | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | NA           | Sodium              | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
| Discipline | Biochem         | istry 💌     | 21/10/2008             | B844057   | Alan Brown  | 3002413056                | Test Result     | к            | Potassium           | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
| Mapping    | Type Test Res   | ult 🜱       | 21/10/2008             | B844057   | alan Brown  | 3002413056                | Test Result     | ALB          | Albumin             | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | нсоз         | Bicarb              | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Allan Brown | 3002413056                | Test Result     | CREA         | Creatinine          | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | UREA         | Urea                | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002 <mark>4</mark> 13056 | Test Result     | TP           | Protein             | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | ALP          | Alk Phos            | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | ALT          | Alt                 | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | GGT          | Gamma GT            | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | BILI         | Bilirubin           | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | AST          | AST                 | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |
|            |                 |             | 21/10/2008<br>11:59:28 | B844057   | Alan Brown  | 3002413056                | Test Result     | CRP          | CRP                 | Input Biochemistry<br>Scheme | Mapped Biochemistry<br>Scheme |

Fig. 1: SCI Store V5.0 - Mapping Audit Report

| St SC                     | I Store P       | aisley                 |               |           |                 |          |             |           |         |               | My Settings | About Store | Log Ou   |
|---------------------------|-----------------|------------------------|---------------|-----------|-----------------|----------|-------------|-----------|---------|---------------|-------------|-------------|----------|
| Home                      | Find Patient    | Find Result            | Find Document | Find on ( | сні             |          |             |           |         |               | Pati        | ent ID:     | G        |
|                           |                 |                        | Configu       | ration    | Exceptions Mgmt | Security | Maintenance | Reporting | General | Notifications |             |             |          |
| Home >                    | Mapping Audit P | leport > Manage        | Scheme Codes  |           |                 |          |             |           |         |               |             | User: admin | on PJSSC |
| Manad                     | qe Scheme C     | odes                   |               |           |                 |          |             |           |         |               |             |             |          |
| Scheme                    | : Input Bioche  | mistry Scheme          |               |           |                 |          |             |           |         |               |             |             |          |
|                           | Code            |                        | Desc          | ription   | Display Or      | der      |             |           |         |               |             |             |          |
| 100.01                    | AMD             |                        | Comm (alcone) |           |                 | E dia    | Dalata      |           |         |               |             |             |          |
| LOC_S/                    | AMP             |                        | Serum/plasma  |           | 1               | Edit     | Delete      |           |         |               |             |             |          |
| LOC_SC                    |                 |                        | Cod           |           | 1               | Eult     | Delete      |           |         |               |             |             |          |
|                           | 511             |                        | 500           |           | 1               | Edit     | Delete      |           |         |               |             |             |          |
|                           | 572             |                        | Pot           |           | 2               | Edit     | Delete      |           |         |               |             |             |          |
|                           | 512             |                        | Alb           |           | 3               | Edit     | Delete      |           |         |               |             |             |          |
| 1                         | 515             |                        |               |           | 5               | Luit     | Delete      |           |         |               |             |             |          |
| Add N<br>Descript<br>Code | lew Scheme      | Code<br>Bicarb<br>HCO3 |               |           |                 |          |             |           |         |               |             |             |          |
| Display                   | Order           |                        |               |           |                 |          |             |           |         |               |             |             |          |
| Add                       | 1               | Exit                   |               | Add Sch   | eme Mapping     |          |             |           |         |               |             |             |          |

Selecting an item on the Mapping Audit report will link to the "Manage Scheme Codes" view. See fig .2.

Fig. 2: Manage Scheme codes view

From the "Manage Scheme Codes", the authorised user can decide how to remedy the mapping error. Once remedial action has been taken the file can be flagged as new and parsed again.

Result Mapping Method: "Create Exception"

With this option set, reports are rejected and placed into exceptions if no translation can be made between the incoming data and required standard code scheme.

If the Mapping Audit report is accessed when the "Create Exception" system setting value is set, the following information message will be displayed:

"The mapping exceptions are not currently being audited. To enable this functionality change the ResultMappingMethod system setting."

If unresolved mapping audit log entries exist, they will remain visible in the Mapping Audit report view even if the administrator changes the mapping method back to "Create Exception"

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## 1.9 Miscellaneous other New Functionality / Resolved Issues

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| Build    | Feature              | Description  |
|----------|----------------------|--|
| 5.0.0850 | New<br>Functionality | Tracker 6565 - Modify Web Service 2.3 and 4.1 to allow<br>ResultCount of the FindPatientResponse/SearchSummary to<br>allow zero                            |
| 5.0.0850 | Resolved<br>Issue    | Tracker 6522 - User and Remote Store Search Screens – Amend to invoke search when User selects the 'Return' key to be consistent with other search screens |
| 5.0.0850 | Resolved<br>Issue    | Tracker 6494 - Notification Services - transactions occurring via the Add Alias Update Rule are not producing Notifications Services events                |
| 5.0.0850 | Resolved<br>Issue    | Tracker 6515 - Document Upload v2.3 - When Originating HCP is null an invalid parse error is raised  |
| 5.0.0850 | Resolved<br>Issue    | Tracker 6534 - Document Tab - Column Sort within tab not<br>persisted when user returns to it after selecting an item                                      |
| 5.0.0850 | Resolved<br>Issue    | Tracker 6535 - Multiple full stop (dot) characters in document<br>filename cause "Document not found" error  |
| 5.0.0950 | New<br>Functionality | Tracker 6491 - XML Interface 4.1 - Implement ability to consume<br>and persist Examination party from an incoming XML document                             |
| 5.0.0950 | New<br>Functionality | Tracker 5355 - V5.1 Patient Consent: UI Refresh: Remove<br>consent column from find patient list   |
| 5.0.0950 | New<br>Functionality | Tracker 6492 – XML Webservices 4.1 - Populate<br>ExaminationDetails/ExaminationParty in outgoing WS 4.1  |
| 5.0.0950 | Resolved<br>Issue    | Tracker 6028 - Results are printing over 2 pages   |
| 5.0.0950 | Resolved<br>Issue    | Tracker 6512 - Obsolete Source Systems present on Parsed File & Uploaded File screen   |
| 5.0.0950 | Resolved<br>Issue    | Tracker 6586 - 'Seeded Record' flag not changing from 'Y' to 'N' when using Add Alias rule   |
| 5.0.0950 | Resolved<br>Issue    | Tracker 6598 - Manual Match Attach Issue when using Soundex  |
| 5.0.0950 | Resolved<br>Issue    | Tracker 6629 - Incorrect message on CHI manual lookup  |
| 5.0.0909 | New<br>Functionality | Tracker 6657 – New and Amended Document Sub Category<br>Codes  |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6738 - Typo in Document Category –'Notification and Legal Documents'   |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6599 - Web Services v4.1 – FindPatient Response Returns the Postcode in the Wrong Format   |

| 5.0.0909 | Resolved<br>Issue    | Tracker 672 - Web Services v4.1 GetResult - HCP Name - Whole Name is Returned as Unstructured String                                       |
|----------|----------------------|--|
| 5.0.0909 | Resolved<br>Issue    | Tracker 627 – Search for 'Notes' in Find Result Doesn't Work for Sample Comments   |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6373 - Searching Within Manage Duplicates Screen<br>Using Surnames Containing An Apostrophe Returns an<br>Unhandled Exception      |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6637 - Manual CHI Lookup - Deceased Flag & Date of<br>Death Not Set When Updating Patient Details                                  |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6646 - Cumulative reporting IE6 Issue with Abnormal<br>Results Display   |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6677 - Cumulative Option Displayed Even When the<br>Permission Not Enabled   |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6668 – CHI Lookup is Expecting Service To Be Hard<br>Coded With the Name 'CHILookup'   |
| 5.0.0909 | Resolved<br>Issue    | Tracker 6694 – Missing Organisation Address Caused Document Upload to Fail   |
| 5.0.913  | New<br>Functionality | Removal of 'Results History' and 'Documents History' from the User Administration Screen   |
| 5.0.913  | New<br>Functionality | IAMS User Account Management   |
| 5.0.913  | New<br>Functionality | Tracker 438 - Mapping - SchemeGroupSelection.aspx (Scheme<br>Grouping Maintenance screen) refactoring                                      |
| 5.0.913  | New<br>Functionality | Tracker 6605 – Amend CHI Daily Broadcast parser to process the updated CHI Daily Broadcast file format                                     |
| 5.0.913  | New<br>Functionality | Tracker 6721 – Report Profile Screen – Extend Functionality  |
| 5.0.913  | Resolved<br>Issue    | Tracker 6622 - ADT Demog Feed Does Not Correctly Populate<br>Source System   |
| 5.0.913  | Resolved<br>Issue    | Tracker 6063 - Windows Service Fails To Reconnect To The<br>Database If Database Server Becomes Temporarily Unavailable                    |
| 5.0.913  | Resolved<br>Issue    | Tracker 6735 - Admin Tab Display – Incorrect counts when NaSH translator used  |
| 5.0.913  | Resolved<br>Issue    | Tracker 6739 - Unhandled exception raised when apostrophe<br>character contained in search criteria within the Manage<br>Duplicates screen |
| 5.0.913  | Resolved<br>Issue    | Tracker 6815 - NS Message Audit Screen - Username<br>Disappears After Changing Message Status  |
| 5.0.913  | Resolved<br>Issue    | Tracker 6838 - Notification Services Unmerge: Provide both SCI<br>Store IDs in the Transaction   |
| 5.0.921  | New<br>Functionality | Tracker 6561 - V5.1 Admin UI: Refactor User Document Audit Report and remove link from User administration screen                          |
| 5.0.921  | New<br>Functionality | Tracker 6691 - Modify User Search Form to Allow Filtering of<br>Users on User Type and User Status   |
| 5.0.921  | New<br>Functionality | Tracker 6796 -V5.1 Remote Results Audit: Modify Result Audit<br>View Recently Viewed Results to Display Remote Details                     |
| 5.0.921  | New<br>Functionality | Tracker 6798 - V5.1 Remote Results Audit: Modify Result Audit to Audit Remote Results After Viewing-                                       |
| 5.0.921  | New<br>Functionality | Tracker 6929 - Update CHI Initial Download Interface to accept new fields (same as CHI Daily Broadcast)                                    |
| 5.0.921  | New<br>Functionality | Tracker 6937 - Modify to GLUE to copy incoming Gateway files to a directory that allows Helix to pickup the files from.                    |
| 5.0.921  | Resolved<br>Issue    | Tracker 6808 – Maintain User Questions – Question List<br>Duplicated   |
| 5.0.921  | Resolved<br>Issue    | Tracker 6903 - Helix V4.1 XML - Merge is Passing Incorrect IDs<br>on Merge Failure   |
| 5.0.921  | Resolved<br>Issue    | Tracker 6908 & 6911 – Helix V4.1 XML - Merging - Before Patient<br>Matching Demog Feed Output Incorrect if Patient Match Fails             |

| 5.0.921 | Resolved<br>Issue | Tracker 6912 – Issue Viewing Documents With Multiple Full<br>Stops in Filename When Stored On a File Server |
|---------|-------------------|---|
| 5.0.921 | Resolved<br>Issue | Tracker 6987 - Cannot Navigate to Result if Investigation Name<br>Contains Apostrophe Character             |
| 5.0.921 | Resolved<br>Issue | Tracker 7036 – View Permissions, Some Patients Incorrectly Hidden   |

Return to Index

## 2. Version 5.1

## 2.1 Access recent results viewed from remote sources

The capability to view a list of recently viewed lab result views has been extended to results accessed from remote systems. This function exists for recently viewed patients already.

From SCI Store Build 5.0.0921 and additional "Source" column will be present in the recently viewed results tab on the home page. This column will be populated for authorised users with and recently viewed remote results that exist.

Enable recently viewed results form remote sources

#### To enable at system level:

1.) Access the system setting from the "General" menu

2.) Set the "Show Remote Data Sources" setting to "True".

Control user access to recently viewed results form remote sources

Access to the recently viewed remote results is controlled on a per user basis.

#### To assign the function to a user

1.) Access "remote data Source Users" setting from the "Security" menu

2.) Search for user

3.) Use the radio buttons to enable/disable the function for each data source the selected user has access to.

#### **Notes**

For results display audit, the display should still operate as it currently does for existing functionality.

Remote results will not have the capability to display audit information and is deemed out of scope for this body of work.

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## 2.2 Cumulative reporting

#### Background

The existing Cumulative Reporting Function has been extended to allow an administrator to create report profiles that allow users to restrict the number of result set groups which can be displayed on the Cumulative Reports screen.

#### Features

#### Key features

The key features are:

• Allow admin user to create cumulative reporting report profiles from the existing report profile screen.

- Allow authorised end users to select and run a cumulative report template based on a report profile set up for cumulative reporting.
- Restrict cumulative reporting prior to a particular date using new and existing system settings
- Change the 'Report View' label text
- Allow Report profiles / templates to span disciplines
- Cumulative sources can be used with conjunction with report profiles to view results across multiple sources.

#### Report Profile Screen

Configuring report profiles is restricted to authorised users. This user security is defined in 'Report Profile Maintenance' module permission.

The existing report profile maintenance screen now has new functionality for creating cumulative report profiles. To create a cumulative report profile the authorised user is required to select:

- Discipline
- result set (associated with discipline)

A cumulative report profile can be renamed or edited and once saved in can be available for use as a template for end users.

Note1: This new cumulative report profile functions do not impact the existing report profiles for laboratory report profiles.

Note2: The 'Repeat Test Day(s)' and 'Display Order' are not required for cumulative report profiles. These fields and will be hidden when creating a cumulative report profile.

Running reports form the cumulative reporting screen

This means that in the Cumulative Report screen the reports could be generated in following two ways: -

- By selecting the 'Interface' and 'Discipline' this displays all result sets for the Report being viewed.
- By selecting a Report Profile template and 'Interface' this displays only the result sets defined in the selected Report Profile for the Report being viewed.

Only authorised users can run report templates on the Cumulative Reporting Screen. Access is controlled using the 'Cumulative Reporting Templates' module permission.

All cumulative report profiles features will be hidden from users that do not have permission to run them.

For a user with permission to run cumulative report profiles the 'Report Template' dropdown list will be visible. The following screen capture shows this option.

| 🕘 Cumu  | lative Report  | - Microsoft Int | ternet Explorer  |                             |                 |                   |              |                        |                   |               |                            |               | - 7 🛛         |
|---------|--|-----------------|------------------|-----------------------------|-----------------|-------------------|--------------|------------------------|-------------------|---------------|----------------------------|---------------|---------------|
| File Ed | ile Edit View Favorites Tools Help 🥂 🧗   |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |
| G Bad   | 😋 Back • 🕤 · 🗷 🖉 🏠 🔎 Search 👷 Favorites 🛷 🔗 + 🌺 🔟 • 🔜 🕲 🖡 🎇 🖓  |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |
| Address | Address 👩 http://localhost/StoreWeb/Restricted/Results/CumulativeReport.aspx?PatientID=418Discipline=Blood_Transfusion8Audt=0 🗸 🎅 Go 🛛 Links 🌣 |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |
| Google  | 8-   |                 | Search           | n 🕂 🚿 • 🧔 🕂 •               | 🔊 • 🔂 E         | Bookmarks • 🛛 🔍 F | ind 🔹 🦑 Chei | :k 🔹 🎦 AutoFill 🤹      |                   |               |                            | es.           | • 🔵 Sign In • |
| SC SC   | I Store P  | aisley          |                  |                             |                 |                   |              |                        |                   |               | My Settings                | About Store   | Log Out 🔥     |
| Home    | Find Patient   | Find Result     | Find Document    | Find on CHI                 |                 |                   |              |                        |                   |               | Pati                       | ent ID:       | Go            |
|         |  |                 | Configu          | ration Excep                | tions Mgmt      | Security M        | aintenance   | Reporting              | General           | Notifications |                            |               |               |
| Home >  | Patient Details  | > Cumulative I  | Report           |                             |                 |                   |              |                        |                   |               |                            | User: admin ( | on PJSSCI6    |
| 4       |  |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |
| - Patie | nt   |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |
| I       | Patient Name<br>NUNIT MlabTes  | it 14           | CHI<br>406502677 | Date Of Birth<br>14/06/1950 | Age<br>58       | GP<br>HOIDA, ELLE | N            | GP Prac<br>UNST HEALTH | ctice<br>H CENTRE | Con<br>O'NEI  | <b>sultant</b><br>LL, EMMA | Ward/Locat    | ion           |
| Report  | Criteria   |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               | *             |
| Date Fr | rom *  | 12/01/2009      | Sources *        |                             | Group : Labs    |                   | ✓ Report     | t Order                | Descending        | 3 💙           | 0 Report                   | s found       |               |
| Date Te | •  | 09/02/2009      | Disciplines      | *                           | Blood_Transfus  | ion Select        | Repo         | t View                 | C View A          | View B        |                            |               |               |
|         |  |                 | Report Tem       | plate                       | Please Select a | Template 💙        | >            |                        |                   |               | Gener                      | ate Report    |               |
|         |  |                 |                  |                             |                 |                   |              |                        |                   |               |                            |               |               |

No report template will be selected when the Cumulative Reporting page is initially loaded for a patient. The report will be based on the other existing search criteria on the page. Once the page has loaded a user can filter on report template if desired.

The default value for the 'Report Template' dropdown list is: 'Please Select a Template...'

The 'Report Template' field is not mandatory. The 'Report Template' dropdown list is populated with all cumulative reporting templates that have been defined in the report profile maintenance section of the application. If no cumulative reporting templates have been defined the dropdown list will not be visible.

The 'Discipline' field is not mandatory. Once a report template has been selected the 'Discipline' field is disabled. This screen capture shows a selected profile with the discipline field disabled (greyed-out).

| a Cumulative Report - Microsoft Internet Explorer  |   |  |  |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|--|--|
| File Edit View Favorites Tools Help  | He Edit View Favorites Tools Help                                   |  |  |  |  |  |  |  |  |
| 😋 Back 🔹 🕠  📓 🐔 🔎 Search 📌 Favorites  🔗 - 🌽 🖉 🝷 🗾 🕲 🕨 🇱 🦓  |   |  |  |  |  |  |  |  |  |
| Address 🕘 http://localhost/StoreWeb/Restricted/Results/CumulativeReport.aspx?PatientID=41&Discipline=Blood_Transfusion&Audit=0   | 💌 ᠫ Go Links 🎽  |  |  |  |  |  |  |  |  |
| Google 🛽 👻 Search 🕫 🔊 👘 🖉 🖉 🔹 🔂 Bookmarks * 🗖 Find * 🍄 Check * 🍃 A   | sutoFill • 🔍 • 🕓 Sign In •  |  |  |  |  |  |  |  |  |
| SCI Store Paisley  | My Settings About Store Log Out                                     |  |  |  |  |  |  |  |  |
| Home Find Patient Find Result Find Document Find on CHI  | Patient ID: Go  |  |  |  |  |  |  |  |  |
| Configuration Exceptions Mgmt Security Maintenance Repo  | rting General Notifications   |  |  |  |  |  |  |  |  |
| Home > Patient Details > Cumulative Report   | User: admin on PJSSCI6  |  |  |  |  |  |  |  |  |
| \$   |   |  |  |  |  |  |  |  |  |
| Patient         Patient Name         CHI         Date Of Birth         Age         GP         GG           NUNIT         MiabTest         1406502677         14/06/1950         58         HOIDA, ELLEN         UNST | iP Practice Consultant Ward/Location<br>HEALTH CENTRE O'NEILL, EMMA |  |  |  |  |  |  |  |  |
| Report Criteria  | *   |  |  |  |  |  |  |  |  |
| Date From * 12/01/2009 👻 Sources * Group : Labs 💌 Report Order   | Descending 💙 0 Reports found  |  |  |  |  |  |  |  |  |
| Date To * 09/02/2009 V Disciplines Blood_Transfusion Select Report View  | C View A 🕫 View B   |  |  |  |  |  |  |  |  |
| Report Template Haematology Tests 💌  | Generate Report   |  |  |  |  |  |  |  |  |

#### Restrict Cumulative Reporting Prior to a Certain Date

An admin user can restrict cumulative reporting prior to a specific date. This is controlled by the 'CumulativeRestrictedDate' system setting. This setting is used in conjunction with the existing cumulative reporting system settings:

- 'CumulativeDiscoveredDates';
- 'CumulativeReportDays'.

Descriptions of these settings are shown in the table below.

| System Setting | Description |
|----------------|-------------|
|----------------|-------------|

| CumulativeDiscoveredDates    | This setting defines the default date range a cumulative report will be based on, when the cumulative reporting page is first loaded.   |
|------------------------------|---|
|                              | When 'CumulativeDiscoveredDates' are set to 'False':  |
|                              | <ul> <li>Date From = (Current Date –<br/>CumulativeReportDays.</li> </ul>   |
|                              | Date To = Current Date  |
|                              | When 'CumulativeDiscoveredDates' are set to 'True':   |
|                              | Date From = Earliest Sample Collected Date  |
|                              | Date To = Latest Sample Collected Date  |
| CumulativeReportDays         | This setting is used in conjunction with the<br>'CumulativeDiscoveredDates' system setting, when it's set<br>to 'True' (this setting is explained above).   |
|                              | It defines the number of days a cumulative report should span across from the date today.   |
|                              | The default for this setting is 28 days.  |
|                              | Using this formula:   |
|                              | Date From = (Current Date – CumulativeReportDays value); and  |
|                              | Date To = Current Date  |
| 'Cumulative Restricted Date' | The following rules should be applied to the new<br>'Cumulative Restricted Date' system setting:  |
|                              | By default the system setting is not configured, this must be configured manually by an administrator.  |
|                              | When the setting is configured it must be in a valid date format.   |
|                              | When a cumulative report is loaded for the first time, the criteria used to define the 'Date From' and 'Date To' search criteria will be determined by the 'Cumulative Discovered Dates' and 'Cumulative Report Days' system settings as outlined in the above table. |
|                              | When the 'Cumulative Restricted Date' setting has been<br>set the following rules for setting the 'Date From' and 'Date<br>To' search criteria should be followed:  |
|                              | If 'Date From' is prior to the 'Cumulative Restricted Date'<br>system setting the 'Cumulative Restricted Date' will replace<br>the 'Date From' value.   |
|                              | If 'Date From' is later than the 'Cumulative Restricted Date' system setting the 'Date From' value will be used.  |
|                              | If 'Date To' is later than the 'Cumulative Restricted Date' system setting the existing 'Date To' value will be used.   |
|                              | Information messages  |
|                              | If a value is displayed for the "Cumulative Restricted Date'<br>an information message is displayed to the end user to<br>inform them that a restriction on the search criteria is in<br>place.   |

| If 'Date To' is prior to the 'Cumulative Restricted Date'<br>system setting the existing 'Cumulative Restricted Date' will<br>replace the 'Date To' value. The end user should be<br>informed of the restriction on the search criteria.   |
|--|
| Error Messages   |
| When the 'Cumulative Restricted Date' setting has been<br>configured and a cumulative report is generated by clicking<br>on the 'Generate' button on the cumulative Report page,<br>neither the 'Date From' or the 'Date To' fields on the<br>Cumulative Report screen page can be prior to this date.<br>If either is, a standard error message should be raised,<br>informing the end-user that the date criterion is outside the<br>allowed date range. The report should not be run. |

#### **Cumulative Sources**

The 'Cumulative Sources' dropdown list is comprises of any cumulative sources that have been pre-defined by an administrator and any services that are related to the results being returned.

A report template may contain results from multiple sources. If a user selects a multiple source report template and requires to see all results, then a 'Cumulative Source' that includes all these sources must be created by an administrator to allow selection in conjunction with the report template.

For cumulative reports that are not generated using a report template, if results are expected from more than one laboratory system, administrators must ensure in advance that 'Cumulative Sources' groups have been pre-configured to ensure that all results can be grouped together.

If users requires to filter results by a specific laboratory system, this will be possible by selecting the relevant source system from the dropdown list.

#### Screenshots / Scenario Walkthrough

Patient "Lorraine Cumulative" has several reports: A Haematology report (R,02.0087122.Y) and a Biochemistry report (zz003500) that both have a Lipid investigation/Result Set.

| SCI SCI                     | Store                         | e Paisley       |                   |                      |                          |                     |                    |                             |                   | My Settin             | gs About Stor          | e Lo      | g Out  |
|-----------------------------|-------------------------------|-----------------|-------------------|----------------------|--------------------------|---------------------|--------------------|-----------------------------|-------------------|-----------------------|------------------------|-----------|--------|
| Home                        | Find Pati                     | ent Find Re     | sult Find I       | Documer              | nt Find on               | СНІ                 |                    |                             |                   |                       | Patient ID:            |           | Go     |
|                             |                               | Cor             | ofiguration       | Exc                  | eptions Mgm              | t Security          | Maintenance        | Reporting                   | General           | Notificatio           | ons                    |           |        |
| Home > Pa                   | atient Det                    | ails            |                   |                      |                          |                     |                    |                             |                   |                       | User: adn              | nin on PJ | ISSCI6 |
| ⇔ ≙∣                        | ا ق 🎙                         |                 |                   |                      |                          |                     |                    |                             |                   |                       | Actions Select Ac      | tion 🔊    | ✓ Go   |
| Patient<br>Patient<br>Lorra | t<br><b>atient N</b> aine Cun | ame<br>nulative | CHI<br>2108606123 | <b>Da</b><br>2:      | te Of Birth<br>1/08/1960 | Age<br>48 HOID      | GP<br>A, ELLEN I   | GP Practic<br>JNST HEALTH C | e<br>Entre        | Consulta<br>KRUGER, R | ant Ward               | /Locatio  | on     |
| Results                     | Documer                       | nts Demograph   | ics ADTs          | IDs .                | Audit Tree Vi            | iew                 |                    |                             |                   |                       |                        |           |        |
| Filter<br>Disciplin         | By                            | )<br>ned        | Select Proce      | ssed In T            | The Last                 | Hours 💌             | Go Displ.<br>Group | ay Mode<br>By Report 🄨 U    | Ingroup By R      | leport C              |                        |           |        |
|                             |                               | o: : I:         |                   | 1.00                 |                          |                     |                    |                             |                   |                       |                        |           |        |
| НО98                        | 8851                          | Haematology     | 23/02/2<br>11:56: | ed At<br>2009<br>:47 | Venous<br>Blood          | 11/07/20<br>00:00:0 | 005<br>00          | FBC 8                       | gation<br>Film    |                       | 12/07/2005<br>00:00:00 | Notes     |        |
| H097                        | 7742                          | Haematology     | 24/02/2<br>13:47: | 009<br>35            | Venous<br>Blood          | 14/07/20<br>00:00:0 | 005<br>00          | FBC 8                       | Film              |                       | 15/07/2005<br>00:00:00 |           |        |
| R,02.008                    | 87122.Y                       | Haematology     | 23/02/2<br>16:05: | 17                   | Blood                    | 19/07/20<br>11:00:0 | 005 Electro<br>00  | lytes & LIPIDS &<br>A1      | & FBC & Haei<br>c | moglobin              | 19/07/2005<br>12:30:00 |           |        |
| zz003                       | 3500                          | Biochemistry    | 23/02/2<br>14:18: | 2009<br>20           | Plasma                   | 13/08/20<br>00:00:0 | 005<br>00          | Gluc                        | ose               |                       | 15/08/2005<br>00:00:00 |           |        |
| zz003                       | 3500                          | Biochemistry    | 23/02/2<br>14:18: | 2009<br>20           | Serum                    | 13/08/20<br>00:00:0 | 005<br>00          | U&E & LFT                   | & LIPIDS          |                       | 15/08/2005<br>00:00:00 |           |        |

In the cumulative report page if we search for Haematology and Biochemistry reports both these results are returned, but are included on rows that include results from the other result sets within one report.

| SCI Store           | e Paisley                     |                   |                       |                          |                  |          |         |                             |      | My Settings                | About Store                  | Log Out                |
|---------------------|-------------------------------|-------------------|-----------------------|--------------------------|------------------|----------|---------|-----------------------------|------|----------------------------|------------------------------|------------------------|
| Home Find Pati      | ent Find Result               | Find Documer      | nt Find on            | CHI                      |                  |          |         |                             |      | Pa                         | tient ID:                    | Go                     |
|                     | Config                        | uration Exc       | eptions Mgn           | nt Security              | Mair             | ntenance | Rep     | orting Gen                  | eral | Notifications              | 5                            |                        |
| Home > Patient Det  | ails > Cumulative             | Report            |                       | COMMENT:                 | N/A              |          |         |                             |      |                            | User: admin                  | on PJSSCI              |
| \$                  |                               |                   |                       | REF RANGE:               | 3.6 - 5.         | 2        |         |                             |      |                            |                              |                        |
| - Patient           |                               |                   |                       | UNITS:                   | mmol/l           |          |         |                             |      |                            |                              |                        |
| Patient N           | ame                           | CHI Dat           | te Of Birth           | LOCAL CODE:              | сно              |          | GP      | Practice                    |      | Consultant                 | Ward/L                       | ocation                |
| Lorraine Cun        | nulative 210                  | 8606123 2:        | 1/08/1960             | LOCAL CODE               | CHOLES           | STEROL   | INST HE | ALTH CENTRE                 |      | KRUGER, RALF               | эн                           |                        |
| Report Criteria     |                               |                   |                       | BOUNDED                  | CHO.             |          |         |                             |      |                            |                              | *                      |
| Date From 02/07/    | 2000 🔽 Sa                     | urces G           | roup : all            | CODE:                    | Chio             |          | Desc    | ending                      |      |                            | 4 Reports found              |                        |
| Date To 13/08/      | 2005 🗸 Di                     | sciplines B       | iochemistry           | CODE DESC:               | CHOLES           | STEROL   | O D     | ates on X-axis              | © Da | tes on Y-axis              | Amend Report 0               | riteria                |
|                     | Re                            | port Template (I  | None)                 | DISCIPLINE:              | Haemat           | tology   |         |                             |      |                            |                              |                        |
| Report Legend : sig | nificant data = '*'           | bounded list= '#' |                       | SOURCE:                  | Telepat          | :h       |         |                             |      |                            |                              |                        |
| DATE                | <b>Albumin</b><br>34 - 48 g/L | Chol/HDL<br>0 - 5 | Choleste<br>0 - 5 mmo | DATE USED:<br>REQUESTOR: | SAMPLE<br>HOIDA, |          | ise     | Potassium<br>3.5 - 5.0 mmol | л.   | Sodium<br>135 - 145 mmol/L | Total Protein<br>66 - 87 g/L | BASOPI<br>0.00 - 0.10> |
| 13/08/05 00:00 *    | 45.1                          | 4.9               | 5.1                   | LOCATION:<br>REPORT ID:  | LEVEN<br>R,02.00 | 087122.Y |         | 3.8                         |      | 132                        | 72.1                         |                        |
| 19/07/05 11:00 *    |                               |                   | <u>7.0 *</u>          |                          |                  |          | -       | 3.8                         |      | 236                        |                              | 0.01                   |
| 14/07/05 00:00 *    |                               |                   |                       |                          |                  |          |         |                             |      |                            |                              |                        |
| 11/07/05 00:00 *    |                               |                   |                       |                          |                  |          |         |                             |      |                            |                              |                        |

If a report profile is set up to only show Lipids result sets from the Biochemistry and Haematology interfaces then only Test Results from the Lipids sets will be displayed.

| Home       Find Patient       Find Result       Find Document       Find on CH1       Patient ID:         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Notifications         tome > Patient Details > Cumulative Report       User: admin or       User: admin or         Patient Details > Cumulative       CHI       Date Of Birth       Age       GP       GP Practice       Consultant       Ward/Loci         Patient Name       CHI       Date Of Birth       Age       GP       GP Practice       Consultant       Ward/Loci         Lorraine Cumulative       2108505123       21/08/1950       48       HOIDA, ELLEN       UNST HEALTH CENTRE       KRUGER, RALPH         Report Criteria   | SCI Stor          | e Paisley            |                             |                                   |          |             |                |             | My Settings   | About Store     | Log Ou   |
|--|-------------------|----------------------|-----------------------------|-----------------------------------|----------|-------------|----------------|-------------|---------------|-----------------|----------|
| Configuration     Exceptions Mgmt     Security     Maintenance     Reporting     General     Notifications       ome > Patient Details > Cumulative Report     User: admin or     User: admin or       -Patient  | Home Find Pat     | ient Find Resul      | t Find Docume               | nt Find on CH                     | II       |             |                |             | Pat           | ient ID:        |          |
| Sector         CHI         Date Of Birth         Age         GP         GP Practice         Consultant         Ward/Loca           Patient Name         CHI         Date Of Birth         Age         GP         GP Practice         Consultant         Ward/Loca           Patient Name         CHI         21/08/1960         48         HOIDA, ELLEN         UNST HEALTH CENTRE         KRUGER, RALPH         Ward/Loca           Report Criteria         Consultant         Outpace         Sources         Group : all         Report Order         Descending         2 Reports found           Date To         13/08/05         V         Disciplines         N/A         Report Order         Descending         2 Reports found           Date To         13/08/05         V         Disciplines         N/A         Report View         Dates on X-axis         Dates on Y-axis         Amend Report Criteria           Report Legend : significant data = "*" bounded list= '2'         Chol/HDL         Chol/HDL         0.50-3.00 mmol/I         0.50-3.00 mmol |                   | Config               | guration Exc                | eptions Mgmt                      | Security | Maintenance | Reporting      | General     | Notifications |                 |          |
| Patient       CHI       Date Of Birth       Age       GP       GP Practice       Consultant       Ward/Loca         Lorraine       Cumulative       2108605123       21/08/1950       48       HOIDA, ELLEN       UNST HEALTH CENTRE       KRUGER, RALPH       Ward/Loca         Report Criteria       Criteria       Consultant       Vard/Loca       Vard/Loca       2 Reports found         Date From       02/07/2000       Sources       Group : all       Report Order       Descending       2 Reports found         Date To       13/08/2005       Disciplines       N/A       Report View       Dates on X-axis       Dates on Y-axis       Amend Report Criteria         eport Legend : significant data = **       bounded list= '*'       Cholesterol       0.50-3.00 mmol/L       0.50-3.00 mmol/L       0.50-3.00 mmol/L         13/08/05 00:00*       4.9       5.1       0.52*       0.52*       0.52*       0.52*   | ome > Patient De  | tails > Cumulative   | Report                      |                                   |          |             |                |             |               | User: admin     | on PJSS( |
| Patient       CHI       Date Of Birth       Age       GP       GP Practice       Consultant       Ward/Loc:         Lorraine       2108506123       21/08/1960       48       HOIDA, ELLEN       UNST HEALTH CENTRE       KRUGER, RALPH       Ward/Loc:         Report Criteria       2007/2000       Sources       Group : all       Report Order       Descending       2 Reports found         Date To       13/08/2005       Disciplines       N/A       Report View       Dates on X-axis       Dates on Y-axis       Amend Report Criteria         apport Legend : significant data = '*' bounded list' =''       Cholesteroil       0:50 - 3.00 mmol/L       TRICLYCERIDES       0.50 - 3.00 mmol/L         13/08/20 00:00*       4.9       5.1       0   | 2                 |                      |                             |                                   |          |             |                |             |               |                 |          |
| Patient Name     CHI     Date Of Birth     Age     GP     GP Practice     Consultant     Ward/Loci       Lorraine     Cumulative     2108606123     21/08/1960     48     HOIDA, ELLEN     UNST HEALTH CENTRE     KRUGER, RALPH       Report Criteria     Date From     02/07/2000     Sources     Group : all     Report Order     Descending     2 Reports found       Date To     13/08/2005     O joicplines     N/A     Report View     Dates on X-axis     Dates on Y-axis     Amend Report Criteria       Report Legend : significant data = "*' bounded list= 's'       DATE     Chol/HDL<br>0-5     Cholesterol<br>0.50-3.00 mmol/L       13/08/05 00:00*     4.9     5.1     1     1       19/07/05 11:00*     70*     0.92*     0.92*     1   | Patient           |                      |                             |                                   |          |             |                |             |               |                 |          |
| Lorraine Cumulative 2108606123 21/08/1960 48 HOIDA, ELLEN UNST HEALTH CENTRE KRUGER, RALPH Report Criteria Date From 02/07/2000 ▼ Sources Group : all Report Order Descending 2 Reports found Date To 13/08/2005 ▼ Disciplines N/A Report View C Dates on X-axis © Dates on Y-axis Amend Report Crite Report Template Bio & Haem Lipids port Legend : significant data = "*" bounded list= "#" DATE Chol/HDL 0-5 Cholesterol 0.50-3.00 mmol/ 13/08/05 00:00* 4.9 5.1 19/07/05 11:00* 70* 0.92*   | Patient N         | ame                  | CHI Da                      | te Of Birth                       | Age      | GP          | GP Practic     | e           | Consultant    | Ward/Lo         | cation   |
| Report Criteria         Date From 12/07/2000 M Sources Group : all Report Order Descending 2 Reports found         Date To       13/08/2005 M Disciplines N/A Report View C Dates on X-axis C Dates on Y-axis       Amend Report Crite         Report View C Dates on X-axis C Dates on Y-axis       Amend Report Crite         Report View C Dates on X-axis C Dates on Y-axis       Amend Report Crite         Report Legend : significant data = ''s' bounded list= 's'         DATE       Cholestorol 0-5 mmol/L         TRIGLYCERIDES 0.50-3.00 mmol/L         13/08/05 00:00*       4.9       5.1       1         13/07/05 11:00*       7.0*       0.92*       0.92*   | Lorraine Cur      | nulative 210         | 08606123 2                  | 1/08/1960                         | 48 HOID  | DA, ELLEN   | JNST HEALTH CI | ENTRE       | KRUGER, RALPI | н               |          |
| Date From     02/07/2000     Sources     Group : all     Report Order     Descending     2 Reports found       Date To     13/08/2005     Disciplines     N/A     Report View     C Dates on X-axis     Dates on Y-axis       eport Legend : significant data = "*" bounded list = '*'       DATE     Chol/HDL     Cholesterol     TRIGLYCERIDES<br>0-5mmol/L       13/08/05 00:00*     4.9     5.1       13/07/05 11:00*     7.0*     0.92*   | Report Criteria   |                      |                             |                                   |          |             |                |             |               |                 |          |
| Date To     13/08/2005     Disciplines     N/A     Report View     Dates on X-axis     Dates on Y-axis     Amend Report Crite       Report Legend : significant data = '*' bounded list= '*'     TKGLYCERIDES     0.50-3.00 mmol/     TKGLYCERIDES       DATE     Cholesterol     0.5 mmol/L     TKGLYCERIDES     0.50-3.00 mmol/       13/08/05 00:00*     4.9     5.1     0.92*  | Date From 02/07   | 7/2000 🔽 Se          | ources G                    | roup : all                        |          | Report Orde | Descending     |             | 2             | 2 Reports found |          |
| Report Template Bio & Haem Lipids           eport Legend : significant data = '*' bounded list= '#'         TRIGLYCERIDES<br>0.50-3.00 mmol/L           DATE         Cholesterol<br>0.5         TRIGLYCERIDES<br>0.50-3.00 mmol/L           13/08/05 00:00*         4.9         5.1           19/07/05 11:00*         7.0*         0.92*   | Date To 13/08     | V2005 🔽 Di           | isciplines N                | /A                                |          | Report View | C Dates on 2   | X-axis 🙆 Da | tes on Y-axis | Amend Report Cr | iteria   |
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| DATE         Chol/HDL<br>0-5         Cholesterol<br>0-5mmol/L         TRGLYCERIDES<br>0.50-3.00 mmol/L           13/08/05 00:00*         4.9         5.1         19/07/05.11:00*   | eport Legend : si | gnificant data = '*' | bounded list= '#'           |                                   |          |             |                |             |               |                 |          |
| 13/08/05 00:00* 4.9 5.1 19/07/05 11:00* 7.0* 0.92*   | DATE              | Chol/HDL<br>0 - 5    | Cholesterol<br>0 - 5 mmol/L | TRIGLYCERIDI<br>0.50 - 3.00 mmol. | ES<br>// |             |                |             |               |                 |          |
| 19/07/05 11:00 · <b>70 ·</b> 0.92 ·  | 13/08/05 00:00 *  | 4.9                  | 5.1                         |                                   |          |             |                |             |               |                 |          |
|  | 19/07/05 11:00 *  |                      | 7.0 *                       | 0.92 *                            |          |             |                |             |               |                 |          |
|  |                   |                      |                             |                                   |          |             |                |             |               |                 |          |

Return to Index

## 2.3 Default grid sort order

#### Background

Establish a function to provide default grid sort orders for Find Patients and Find Results is at a system wide level.

#### Features

There are two new system settings to allow default sort order for the Find Patient & Find Result pages to be set as ascending or descending against any column on the search results grid:

- FindResultsSortOrder
- FindPatientsSortOrder

These will be 'listtype' system settings allowing the choice of each search result column in ascending or descending order.

If the system settings are not switched on then default to the current sort order value.

#### Notes

The findpatient and findresult web services are unaffected since the sorting functionality is handled post-database on the returned dataset.

Return to Index

## 2.4 Patient search logic

#### Background

A request (in version 5.1 of SCI Store) was made to by users to suppress the display of any child patient details from the list of patients returned by a patient search.

This request led to a revision of SCI Store patient search logic with regard to merged patients and transitory data.

In SCI Store, transitory data is defined as data that will change in value on a regular basis. For example, ward and consultant values for a patient.

In SCI Store a merged patient represents two patient records that are linked (merged) together. Two separate patient records still exist in the database. One of the merged patients becomes the "master" (Merged to) and the other becomes the "child" (Merged from). The "master" patient is seen as containing the 'correct' patient details. These details are displayed throughout the SCI Store Web Front-End and passed onto Web Service consumers. The "child" patient details are retained with SCI Store and can still be searched on. Selecting a "child" patient from a search list will result in the related "master" patient details being displayed.

#### Current state

Existing search logic business rules:

- Regardless of the search criteria input, a search of all patients (master and child) matching the search criteria is initiated.
- The patient details displayed within the list of search results returned may relate to the **master** or the **child** patient.
- Selection of a patient from the returned search list will always result in the **master** patient details for that patient being displayed.

#### **Reason for change to Patient Search Logic**

This change is required because the SCI Store user community require the search function to be sensitive to the context of the search criteria.

#### **Feature Summary**

Find Patient Search Criteria Filters

Detailed below is a list of Find Patient search criteria fields and corresponding filters that should be applied.

If more than one search criteria is used.

| Description | Master Patients only | All Patients |
|-------------|----------------------|--------------|
|-------------|----------------------|--------------|

| Surname             |          | ✓        |
|---------------------|----------|----------|
| Forename            |          | ✓        |
| Date of Birth       |          |          |
| Postcode            |          | <b>√</b> |
| Patient Identifier  |          |          |
| GP                  |          |          |
| GP Practice         | <b>√</b> |          |
| Consultant          | <b>√</b> |          |
| Ward / Location     | <b>√</b> |          |
| Hospital / Site     | <b>√</b> |          |
| Must Have Results   |          | <b>√</b> |
| Results In The Last |          | <b>√</b> |
| Results Between     |          |          |
| Discipline          |          | <b>√</b> |
| Investigation       |          | ✓        |
| Test                |          | ✓        |

#### Master Patients Only Filter

Invoke a search of **master** patients only matching the search criteria input by the user.

Example: A search on "Ward 1" should <u>only</u> return a list of patients who are currently in "Ward 1". This means that a master patient filter should be applied and any child patients that relate to "Ward 1" searched on are not relevant.

#### All Patients (Master & Child)

A search of all patients (**master** and **child**) matching the search criteria will be initiated.

Example: A search on the surname "Smith" is used to find all patients with this surname. This means that all patients that meet the search criteria ("smith") must include **master** and **child** patients. In summary, any child patient with a surname of "Smith" is also relevant.

#### Search results display

The patient details displayed within the list of search results returned will always relate to the **master** patient.

#### Search results navigation

Selection of a patient from the list will always result in the **master** patient details being displayed.

It is important to note that if a child patient is returned by the search, <u>only</u> the related master patient details will be displayed within the search results list.

#### Patient details information message

On navigation to the patient details an information message will be displayed that informs the patient is merged.

#### Filter rule priority

When multiple search criteria are used each of the individual search criteria will have their specific filter applied to them.

This means that if one of the multiple search criteria supplied has a "Master Only" filter, then all child patients will be filtered out of the search.

#### Return to Index

## 2.5 'Printed By' name changed to Friendly Name

#### Background

Currently all prints have a footer of, for example:

"Printed By: Username1 on 05/05/2008 11:46:53"

As usernames are often not descriptive can this be changed to use the friendly name? For example:

"Printed By: Hugh Gilbert on 05/05/2008 11:46:53"

This will avoid confusion and unnecessary admin to check who the username refers to when this information is required.

#### Features

- Change printed name to friendly name on printed reports.
- Use forename, surname if friendly name not mandatory.

#### Return to Index

## 2.6 Remove erroneous patient identifiers

#### Background

At present it is not possible to remove erroneous patient ID numbers from a patient record.

The capability to remove patient IDs is required in cases where a un-merge has occurred on the PAS system where the CRN and CHI numbers are no longer attached to the same person.

#### Scope

- Support a function to flag a patient identifier as 'Removed'.
- Support function to suppress display of "removed" patient identifiers via the Web-Front End.
- Support a function to record audit data. (To be decided by designer)
- Support a function to display audit data containing details of user and patients.

#### Features

#### Find patient identifier

The Find Patient Identifiers option is found on the Maintenance menu and allows the user to search for patients and remove identifiers associated with them.

#### To find a patient identifier:

Enter the search criteria and click Search.

| 🥙 Find Patient Identifiers - Windows Internet Explorer   | ΞX         |
|--|------------|
| 😧 🕘 👻 🖹 http://jloahox//Store/Web/Restricted/Patient/Find-Patient/Benzielent/Benzielent/Ben | <b>P</b> • |
| File Edit View Favorites Tools Help  |            |
| 🛠 🏘 🎉 Find Patient Identifiers 🎒 - 👼 - 😥 Page - 🛞 To   | ols + »    |
| ScI Store Paisley My Settings About Store Log  | Out 🛆      |
| Home Find Patient Find Result Find Document Find on CHI Patient ID:  | Go         |
| Configuration Exceptions Mgmt Security Maintenance Reporting General Notifications   |            |
| Home > Find Patient Identifiers User: admin on PJS   | SCI6       |
| Search Options Search Clear 2 Records Returned   |            |
| Surname equals V black CHI Name DOB Sex Address  |            |
| 7830135222 Alison Black 21/10/1952 F 1 Garnock Place Kilbirnie Ayrshire Scotland   |            |
| Forenames equals v 1234567890 Jimmy Black 15/09/1972 M 1234 North West Road Smalltown  |            |
| Date Of Birth  |            |

Results will be returned in the search results grid.

#### **Remove patient Identifiers**

The Remove Patient Identifiers page shows a list of the selected patient's identifiers. However, the current CHI number is not displayed as this cannot be removed.

#### To display the Remove Patient Identifiers page:

Select a patient form the "find patient records" search results grid

(The "remove patient identifiers" view is shown)

| 🖉 Remov   | ve Patient Iden  | tifiers - Wind   | ows Internet Explo     | rer            |                          |          |             |             |         |               |             |               | - 6 🛛         |
|-----------|------------------|------------------|------------------------|----------------|--------------------------|----------|-------------|-------------|---------|---------------|-------------|---------------|---------------|
| 00        | ▼ 2 http://lo    | calhost/StoreWeb | /Restricted/Patient/Re | movePatientIde | ntifiers.aspx?PatientID= | =134     |             |             |         | ~             | 😽 🗙 Google  |               | <u>۹</u>      |
| File Edit | View Favorit     | es Tools Hel     | p                      |                |                          |          |             |             |         |               |             |               |               |
| * *       | CRemove Pati     | ent Identifiers  |                        |                |                          |          |             |             |         |               | 🙆 • 🔊 ·     | 🖶 🔹 🔂 Page    | • 🎯 Tools • 👌 |
| SC:       | I Store Pa       | aisley           |                        |                |                          |          |             |             |         |               | My Settings | About Store   | Log Out       |
| Home      | Find Patient     | Find Result      | Find Document          | Find on CH     | I                        |          |             |             |         |               | Patie       | ant ID:       | Go            |
|           |                  |                  | Configu                | ration E       | xceptions Mgmt           | Security | Maintenance | Reporting   | General | Notifications |             |               |               |
| Home > F  | ind Patient Ider | ntifiers > Remo  | ove Patient Identifie  | rs             |                          |          |             |             |         |               |             | User: admin   | on PJSSCI6    |
| ⇔         |                  |                  |                        |                |                          |          |             |             |         |               |             |               |               |
| - Patier  | nt               |                  |                        |                |                          |          |             |             |         |               |             |               |               |
|           | Patient Nan      | ne               | CHI                    |                | Date Of Birth            | Ag       | e GP        | GP Practice |         | Consultant    |             | Ward/Location |               |
|           | Alison Blac      | ¢                | 7830135222             |                | 21/10/1952               | 56       |             | (61)        |         |               |             |               |               |
| 2 Record  | ds Returned      |                  |                        |                |                          |          |             |             |         |               |             |               |               |
|           | 70.11            |                  | 70.01                  |                |                          | -        |             |             |         |               |             |               |               |
| 992246    | ID Value         |                  | ID Sche                | me             | Berronal                 | Туре     | Remove      |             |         |               |             |               |               |
| ABC334    | 43               | 0                | ERN                    |                | ABC                      |          | Remove      |             |         |               |             |               |               |

Click on the remove link next to the identifier to be removed and you will be presented with a dialog box asking if you are sure you want to remove the selected identifier.

Select OK or Cancel.

(The list of patient identifiers will be refreshed to show that the selected one has been

removed).

Return to Index

## 2.7 Results HTML via web service Background

This change is to establish an HTML view of lab results data that can be accessed using the SCI Store Web Service.

Delivery of this feature ensures that the order and format that lab results are displayed in a consistent manner across systems.

If an external system obtains results data from SCI Store via a Web Service request, they could alter the display of the results in the requesting system's user-interface. Having an HTML view of the results data will allow SCI Store to maintain control over the order and display qualities of the data when being viewed in eternal systems.

#### Features

Modify web service generation (2.3 and 4.1) to include the rendered html results using the split out display classes.

#### Notes

CSS display classes that are specific to results display have been separated from other application styles to allow them to be "transported" with the HTML block via Web Services.

Comparison should be made between the third-party application and SCI Store results display to ensure that consistency is maintained.

Return to Index

## 2.8 SCI Store linked documents

#### Background

Referrals from SCI gateway can contain document attachments. These are linked to the referral using a package identifier.

#### Features

#### <u>Overview</u>

Support a function to highlight that a document has attachments (new "linked" column, green check " 🖍 " signifies that linked document exits).

Support a function to link to a list of linked documents. (Select, green check to navigate to list of linked documents.

#### Home page

The recently viewed document tab on the home page will show a green check " $\checkmark$ " in the linked column linked documents exist for the document shown:

| SCI Stor   | re Paisley   |  |   |   |  | My Settings  | About 9                           | Store                                | Log O            |
|--|--|--|---|---|--|--|-----------------------------------|--------------------------------------|------------------|
| ome Find Pa  | tient Find Res   | ult Find Do  | ocument Find o  | n CHI   |  | P  | atient ID:                        |                                      |                  |
| Co   | onfiguration   | Exceptions   | Mgmt Securi   | ty Maintenance  | Reporting  | General  | Notificatio                       | ons                                  |                  |
| me   |  |  |   |   |  |  | User: a                           | idmin o                              | n PJSSC          |
| System Mess<br>his is the regi   | ages<br>ression test inst  | tance of buil  | d 5.1.0925 of SC  | I Store. Please use   | e for Regressi   | on Test purp   | oses only.                        |                                      |                  |
| Recently Viewed  | Recently Created   | My Favourites  | Administration  |   |  |  |                                   |                                      |                  |
| Patients Res   | ults Documents   | 5  |   |   |  |  |                                   |                                      |                  |
|  |  |  |   |   |  |  |                                   |                                      |                  |
| 5 Records Retu   | urned  |  |   |   |  |  |                                   |                                      |                  |
| 5 Records Retu<br>Name   | urned<br>Title   | Revision   | Category  | Sub-Category  | Specialty  | Uploaded   | Sensitivity                       | View                                 | Linked           |
| 5 Records Retu<br>Name<br>Willbe<br>Secondary  | Title<br>Compas Merge<br>Willbe<br>Secondary   | Revision   | Category<br>Correspondence  | Sub-Category<br>Clinical letter   | <b>Specialty</b><br>Haematology                                  | Uploaded<br>11/06/2009   | Sensitivity<br>S                  | View<br>View                         | Linked           |
| 5 Records Retu<br>Name<br>Willbe<br>Secondary<br>Test roletest1  | Title<br>Compas Merge<br>Willbe<br>Secondary<br>Role Test1 HS<br>Document Test   | Revision           001           001                           | Category<br>Correspondence<br>Reports                                     | Sub-Category<br>Clinical letter<br>AHP report   | <b>Specialty</b><br>Haematology<br>Haematology                   | Uploaded<br>11/06/2009<br>15/06/2009                             | Sensitivity<br>S<br>HS            | View<br>View<br>View                 | Linked<br>-<br>- |
| 5 Records Retu<br>Name<br>Willbe<br>Secondary<br>Test roletest1<br>Kenneth<br>THOMAS                         | Title<br>Compas Merge<br>Willbe<br>Secondary<br>Role Test1 HS<br>Document Test<br>SCI Gateway<br>Discharge                                 | Revision           001           001           1               | Category<br>Correspondence<br>Reports<br>Correspondence                   | Sub-Category<br>Clinical letter<br>AHP report<br>Immediate<br>Discharge letter                              | Specialty<br>Haematology<br>Haematology<br>unknown               | Uploaded<br>11/06/2009<br>15/06/2009<br>16/06/2009               | Sensitivity<br>S<br>HS<br>HS      | View<br>View<br>View<br>View         | Linked<br>-<br>- |
| 5 Records Retu<br>Name<br>Willbe<br>Secondary<br>Test roletest1<br>Kenneth<br>THOMAS<br>Test<br>PatientMatch | Title<br>Compas Merge<br>Willbe<br>Secondary<br>Role Test1 HS<br>Document Test<br>SCI Gateway<br>Discharge<br>Failed patient<br>match test | Revision           001           001           1           001 | Category<br>Correspondence<br>Reports<br>Correspondence<br>Clinical Notes | Sub-Category<br>Clinical letter<br>AHP report<br>Immediate<br>Discharge letter<br>Multidisciplinary<br>note | Specialty<br>Haematology<br>Haematology<br>unknown<br>Cardiology | Uploaded<br>11/06/2009<br>15/06/2009<br>16/06/2009<br>15/06/2009 | Sensitivity<br>S<br>HS<br>HS<br>S | View<br>View<br>View<br>View<br>View | Linked           |

#### Find Document

Following a Find Document Search, linked documents are highlighted in the "Linked" column on the right hand side of the search results grid – see screenshot below. If the document has other linked document a green check " ✓" will be shown.

| SCI                    | Store Pa      | aisley     |          |                   |                    |             |            |      |          |                                 |        |           |                        | My Settings | About 9 | Store    |
|------------------------|---------------|------------|----------|-------------------|--------------------|-------------|------------|------|----------|---------------------------------|--------|-----------|------------------------|-------------|---------|----------|
| Home                   | Find Patient  | Find Resul | t Find D | ocument Find      | on CHI             |             |            |      |          |                                 |        |           |                        | Patient     | ID:     |          |
|                        |               |            |          | Configuratio      | n Exce             | ptions Mgmt | Security   | Mai  | ntenance | Reporting                       | Gene   | ral Noti  | ications               |             |         |          |
| Home > Fir             | nd Document   |            |          |                   |                    |             |            |      |          |                                 |        |           |                        |             | User: a | ndmin on |
| Search O               | ptions        | Search     | Clear    | 2 Records Ret     | urned              |             |            |      |          |                                 |        |           |                        |             |         |          |
| Document<br>Identifier | begins        | *          |          | Name              | Patient<br>Consent | СНІ         | DOB        | Rev. |          | Category                        |        | Specialty | Document<br>Date       | Sensitivity | View    | Notes    |
| Surname                | equals        | ✓ thomas   |          | Kenneth<br>THOMAS | Y                  | 1107273455  | 11/07/1927 | 1    | Correspo | ndence / Imme<br>scharge letter | ediate | unknown   | 15/12/2008<br>00:00:00 | HS          | View    |          |
| Date of                | equais        | <b>`</b>   | ~        | Kenneth<br>THOMAS | Y                  | 1107273455  | 11/07/1927 | 1    | Correspo | ndence / Imme<br>scharge letter | ediate | unknown   | 15/12/2008<br>00:00:00 | HS          | View    |          |
| Birth<br>Identifier    | equals        | ~          |          |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Document<br>Title      | t             |            |          |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Category               | All Catego    | ries       | *        |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Sub Cate               | gory          |            | ~        |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Advanced               | Search Option | าร         | ×        |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Available              | Data Sources  |            |          |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Local                  | <b>V</b>      | 2 Results  |          |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |
| Local 4.1              |               |            |          |                   |                    |             |            |      |          |                                 |        |           |                        |             |         |          |

#### Patient details document tab

This view shows which documents have a linked document associated. Illustrated by the green check "

| 🖉 Patient Details - Windows Internet Explore            | r            |   |                        |                          |                 |                     |              |           | - 2        |
|---|--------------|---|------------------------|--------------------------|-----------------|---------------------|--------------|-----------|------------|
| 🚱 🗣 🖉 http://localhost/StorePackageId/Stor              | eWeb/Rest    | tricted/Patient/PatientDetails.aspx?&ClassIdx | =1468SiteID=0          |                          |                 | 🗸 🛃 🗙 Livi          | e Search     |           | 2          |
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| Home Find Patient Find Pacult Find D                    | ocument      | Find on CHI                                   |                        |                          |                 |                     | Patient ID:  |           | Go         |
| Home This Patient, This Result, This D                  | Config       | uration Exceptions Mamt S                     | ecurity Mainten        | ance Reporting           | General No      | tifications         | Patient 10.  |           |            |
| Home > Patient Details                                  |              |   |                        |                          |                 |                     | User:        | admin     | on PJSSCI6 |
| ← & / / 3 <b>=</b>                                      |              |   |                        |                          |                 |                     | Actions Sele | ct Action | . 🗸 Go     |
| Patient   |              |   |                        |                          |                 |                     |              |           |            |
| Patient Name  |              | CHI Date Of Birt                              | th Age                 | GP GP Pract              | ice             | Consultant          | Ward/        | Locatior  | 1          |
| TREVOR DAVIDSON   | 121          | 2431393 12/12/1943                            | 65                     |                          |                 |                     |              |           |            |
| Results Documents Demographics ADTs                     | IDs Au       | dit Tree View                                 |                        |                          |                 |                     |              |           |            |
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| 64 Records Returned Records Per Page                    | 20 💙         | View All                                      |                        |                          |                 |                     |              |           |            |
| 1234  |              |   |                        |                          |                 |                     | ~            |           |            |
| Title   | Rev.         | Category                                      | Specialty              | Document Date            | Sensitivity     | Last Accessed       | View         | Notes     | Linked     |
| SCI Gateway Referral                                    | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              | 19/02/2009 09:05:18 | View         |           | 1          |
| Trevor Davidson Referral Attachment                     | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | 1          |
| Trevor Davidson Referral Attachment_2                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | 1          |
| Trevor Davidson Referral Attachment_3                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_4                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_5                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_6                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              | 26/01/2009 11:02:47 | View         |           | ✓          |
| Trevor Davidson Referral Attachment_7                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_8                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_9                   | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_10                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | ✓          |
| Trevor Davidson Referral Attachment_11                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              | 26/01/2009 11:02:55 | View         |           | ✓          |
| Trevor Davidson Referral Attachment_12                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         | ۵         | ✓          |
| Trevor Davidson Referral Attachment_13                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              | 27/01/2009 10:18:02 | Retired      | ۵         | ✓          |
| Trevor Davidson Referral Attachment_14                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         | ۵         | 1          |
| Trevor Davidson Referral Attachment_15                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         | ۵         | 1          |
| Trevor Davidson Referral Attachment_16                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | 1          |
| Trevor Davidson Referral Attachment_17                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | 1          |
| Trevor Davidson Referral Attachment_18                  | 001          | Correspondence / Referral letter              | General Medicine       | 17/10/2007 15:48:22      | HS              |                     | View         |           | 1          |
| http://localhost/StorePackageId/StoreWeb/Restricted/Doc | umentToDa    | tabaseView/LinkedDocuments.aspx?Packagel      | ID=SCI-Gateway-3006&0  | llas                     |                 | 🏹 😜 Ir              | itemet       |           | 🔍 100% 👻   |
|   |              |   |                        |                          |                 |                     |              |           |            |
|   |              |   |                        |                          |                 |                     | $\sim$       |           |            |

#### Linked document View

Selecting a linked document in the patient details document tab will show a grid view of all document linked together by a package identifier:

| SCI Stor          | e Paisle                             | У                 |         |  |                     |              |                        | My Settings            | About Sto    | re     | Log Out |
|-------------------|--------------------------------------|-------------------|---------|--|---------------------|--------------|------------------------|------------------------|--------------|--------|---------|
| Home Find Pat     | ient Find                            | Result Find I     | Docume  | nt Find on C                                   | ні                  |              |                        | Pa                     | tient ID:    |        | Go      |
| Co                | nfiguration                          | Exception         | s Mgm   | t Security                                     | Mair                | itenan       | e Reportin             | g General              | Notification | 5      |         |
| Home > Find Docur | ment > Patier                        | nt Details > Link | ced Doc | uments   |                     |              |                        |                        | User: adı    | nin on | PJSSCI  |
| ⇔                 |                                      |                   |         |  |                     |              |                        |                        |              |        |         |
| Patient           |                                      |                   |         |  |                     |              |                        |                        |              |        |         |
| Patient Na        | me                                   | CHI               | Da      | te Of Birth                                    | Age                 | GP           | GP Practice            | Consultant             | t Ward       | /Locat | ion     |
| Kenneth TH        | OMAS                                 | 1107273455        | 1       | 1/07/1927                                      | 81                  |              |                        |                        |              |        |         |
| 2 Records Return  | ed                                   |                   |         |  |                     |              |                        |                        |              |        |         |
|                   | Title                                |                   | Rev.    | Cate   | egory               |              | Specialty              | Document<br>Date       | Sensitivity  | View   | Notes   |
| SCI Ga            | SCI Gateway Discharge                |                   |         | Correspondence / Immediate<br>Discharge letter |                     | unknown      | 15/12/2008<br>00:00:00 | HS                     | View         |        |         |
| Kenneth_Thomas    | enneth_Thomas_EDIS_Discharge25_Lette |                   |         | Corresponden<br>Dischar                        | ce / Im<br>ge lette | mediate<br>r | unknown                | 15/12/2008<br>00:00:00 | HS           | View   |         |
|                   |                                      |                   |         |  |                     |              |                        |                        |              |        |         |

#### Document metadata view toolbar link

Selecting the "linked document" icon will navigate to the linked document view.

| C Document Information - Windows Int          | ternet Explorer                |                      |                |             |               |            |
|---|--------------------------------|----------------------|----------------|-------------|---------------|------------|
| 🚱 🗢 🕖 http://pjssci6/StoreWeb/Rest            | tricted/DocumentToDatabaseView | /DocumentInformation | n.aspx?&Dc 🔽 🛃 | Google      |               | <b>P</b> - |
| File Edit View Favorites Tools Help           |                                |                      |                |             |               |            |
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| SCI Store Paisley                             |                                |                      |                | My Settings | About Store   | Log Out 🔺  |
| Home Find Patient Find Result                 | Find Document Find on (        | СНІ                  |                | Pa          | tient ID:     | Go         |
| Configuration Exce                            | ptions Mgmt Security           | Maintenance          | Reporting      | General     | Notifications |            |
| Home > Find Document > Patient Details :      | > Document Information         |                      |                |             | User: admin   | on PJSSCI6 |
|   |                                |                      |                | Actions     | Select Action | ✓ Go       |
|   |                                |                      |                |             |               |            |
| Current document has linked docu<br>— Patient | uments                         |                      |                |             |               |            |
| Patient Name CHI                              | Date Of Birth                  | Age GP G             | P Practice     | Consultan   | t Ward/Lo     | cation     |
| Kenneth THOMAS 11072734                       | 11/07/1927                     | 81                   |                |             |               |            |
| Current Specified Document                    | - Document Metadata-           |                      |                |             |               |            |
| Title   | Originating Hcp                |                      |                |             |               |            |
| SCI Gateway Discharge                         | (JONES)                        |                      |                |             |               |            |
| SCI-Gateway-515151 yml                        | Attesting Hcp                  |                      |                |             |               |            |
| Document Revision                             | Receiving Hcp                  |                      |                |             |               |            |
| 1   | Copied Hcp                     |                      |                |             |               |            |
| Category                                      | Patient Consent                |                      |                |             |               |            |
| Correspondence                                | Yes                            |                      |                |             |               |            |
| Sub-Category                                  | Sensitivity                    |                      |                |             |               |            |
| Immediate Discharge letter                    | Highly Sensitive               |                      |                |             |               |            |
| Date  | Additional Text                |                      |                |             |               |            |
| Recipient                                     |                                |                      |                |             |               |            |
| Document Specialty                            | No Data To Display             |                      |                |             |               |            |
| unknown                                       |                                |                      |                |             |               |            |
| Document Organisation                         |                                |                      |                |             |               |            |
| CITY HOSPITAL, LOW LANE LONDON                |                                |                      |                |             |               |            |
| Document Organisation Type                    |                                |                      |                |             |               |            |
| nospital                                      |                                |                      |                |             |               | ~          |
|   |                                |                      |                | Secol 🧐     | intranet      | 🔍 100% 🔹 💡 |

#### Return to Index

## 2.9 UI refresh - Documents uploaded

#### Background

User-interface redesign:

- Adhere to UI recommendations for admin
- Enhance workflow so that searches are maintained when returning to previous forms
- Improve usability

•

The following forms have been redesigned as part of the Document Upload exceptions management feature:

- Services / DocumentToDatabaseSearch.aspx
- Services / DocumentToDatabaseDetails.aspx
- Services / DocumentToDatabaseManualMatch.aspx

#### Features

- Standard toolbar added
- Search form style standardised (same as "Find Patient" style)
- Search results header bar with pagination
- Form functions moved to actions dropdown menu on toolbar

#### Screenshots

NEW SCREEN: documents uploaded (Doc to DBsearch)

| 🖉 Documents Uploaded - Windows Internet I                            | Explorer                                      |                                    |            |                     |   |
|--|---|------------------------------------|------------|---------------------|---|
| COO - E http://anotherserver/StoreWeb/Res                            | tricted/Services/DocToDBS                     | earch.aspx                         |            |                     | Soogle  |
| Ele Edit View Favorites Tools Help                                   |   |                                    |            |                     |   |
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| SCI Store Paisley  |   |                                    |            |                     | My Settings About Store Log Out 🔥   |
| Home Find Patient Find Result Find E                                 | ocument Find on C                             | ні                                 |            |                     | Patient ID: Go  |
|  | Configuration                                 | Exceptions Mg                      | mt Secur   | rity Mainte         | enance Reporting General Notifications  |
| Home > Documents Uploaded  |   |                                    |            |                     | User: admin on PJSSCI6  |
| Search Options Search Clear  | 58 Records Returned                           | Records P                          | er Page 20 | Y View All          | File Actions Select Action 🛩 Go   |
| Document<br>Source   | 123   |                                    |            |                     |   |
| XML Filename   | Service XML File<br>Date                      | Processing<br>Stage<br>Reached     | Processed  | Status              | Description   |
| Stage Vicessed   | Remote 2009-06-<br>File 02<br>Server 16:19:23 | 3 - Document<br>Upload             | ок         | Unexpected<br>Error | 08/06/2009 08.41.29MessagePersist.DocumentToDatabaseStore: Failed to create Remote Filesystem<br>Directory: \\Pjssci5\c\$\RemoteDocs\2004\04\20   |
| Status (All Errors)  | Local 2009-05-<br>Docs 20<br>v2.3 12:06:22    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 20/05/2009 12.05.40XML Parsing Errors Error ValidateXML: Error validating Document Category<br>against Clinical Index. Error ValidateXML: Error validating Document SubCategory against Clinical<br>Index.  |
| Date/Time<br>From  | Local 2009-05-<br>Docs 20<br>v2.3 12:00:57    | 5 - Link<br>Document to<br>Patient | ок         | XML Parse<br>Error  | 20/05/2009 12.01.17 Document rejected: This revision already on file.   |
| Date/Time To   | Local 2009-05-<br>Docs 20<br>v2.3 11:56:33    | 5 - Link<br>Document to<br>Patient | ок         | Unexpected<br>Error | 20/05/2009 11.56.46 Document rejected: Higher revision already on file.   |
| Surname equals V   | Local 2009-05-<br>Docs 20                     | 5 - Link<br>Document to            | ок         | Unexpected<br>Error | 20/05/2009 11.54.24 Document rejected: Higher revision already on file.   |
| Date Of Birth  | Local 2009-05-<br>Docs 20<br>v2.3 11:05:45    | 5 - Link<br>Document to<br>Patient | ок         | Unexpected<br>Error | 20/05/2009 11.06.54 Document rejected: Higher revision already on file.   |
| CHI China ID   | Local 2009-05-<br>Docs 20<br>v2.3 11:05:11    | 5 - Link<br>Document to<br>Patient | ок         | XML Parse<br>Error  | 20/05/2009 11.06.23 Document rejected: This revision already on file.   |
| Document Details   | Local 2009-05-<br>Docs 20                     | 3 - Document<br>Upload             | ок         | Unexpected<br>Error | 20/05/2009 11.04.42 Could not find the specified Document   |
| Document Identifier<br>Document Category<br>Document Sub<br>Category | Local 2009-05-<br>Docs 20<br>v2.3 10:59:38    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 20/05/2009 10.59.41XML Parsing Errors Error Seation after: Date/Birth The<br>http://www.show.sco.ths.ui/dd/Garearicbace/Birth element has an invalid value according to its<br>data type, Error Position after: NoteDate The "http://www.show.sco.ths.ui/dd/SCIStore:NoteDate'<br>element has an invalid value according to its data type, Error Position after:<br>DocumentAttestation/Date The "http://www.show.sco.ths.ui/dd/General:Date/<br>element has an invalid value according to its data type. |
| Additional Text  | Local 2009-05-<br>Docs 20<br>v2.3 10:58:57    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 20/05/2009 10.59.12XML Parsing Errors Error ValidateXML: Date of Birth value is in the future Error ValidateXML: Document Attestation Date value is in the future   |
| Document Specialty Document Organisation                             | Local 2009-05-<br>Docs 20<br>v2.3 10:28:30    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 12/05/2009 10.25.502ML Parsing Errors Error ValidateXML: Error Validating Document Category<br>against Clinical Index. Error ValidateXML: Error Validating Document SubCategory against Clinical<br>Index. Error ValidateXML: Document Revision value is not numeric Error ValidateXML: Document<br>Status is not recognised (New/Amend/Delete)   |
| Attesting HCP  | Local 2009-05-<br>Docs 19<br>v2.2 15:57:06    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 19/05/2009 13:57:153VML Parsing Error Beror Position after: Originatinghto: The element<br>TocumentDate in namespace http://www.show.soci.his.uk/sd/DocumentUplad has invalid child<br>element "DocumentAtestationDate" in namespace "http://www.show.soci.his.uk/sd/General*Ltst of<br>possible element expected: "http://www.show.soci.his.uk/sd/General*Ltsting_icp;"  |
| Copied HCP   | Local 2009-05-<br>Docs 19<br>v2.2 15:55:42    | 2 - XML<br>Parse                   | ок         | XML Parse<br>Error  | 19/05/2009 15.5:439MIL Parsing Errors Error Fosition after: DocumentStatus The element<br>'DocumentData' in namespace http://www.show.soc.hns.uk/sid/DocumentUplad' has invalid htlid<br>element 'Attesting, htp: in namespace http://www.show.soc.hns.uk/sid/General', List of possible<br>elements expected: http://www.show.soc.hns.uk/sid/General', List of possible<br>elements expected: http://www.show.soc.hns.uk/sid/General', List of possible  |
|  |   |                                    |            |                     | 19/05/2009 15.55.19XML Parsing Errors Error Position after: DocumentAttestationDate The   |
| Done   |   |                                    |            |                     | Scalintranet 🔍 100% 👻   |

## OLD SCREEN (For reference)

| C Documents Uploaded - Windows Internet Explorer   |           |                    |                        |                             |             |                     |  |                     | <b>B</b> 🗙 |
|--|-----------|--------------------|------------------------|-----------------------------|-------------|---------------------|--|---------------------|------------|
| COO - E http://10.248.9.10/StoreWeb14/Restricted/Services/Doc  | umentToDa | atabaseSear        | ch.aspx                |                             |             |                     | 🖌 🛃 🔀 Google   |                     | <b>P</b> • |
| Ele Edit View Favorites Iools Help   |           |                    |                        |                             |             |                     |  |                     |            |
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| SCI Store Paisley  |           |                    |                        |                             |             |                     | My Settings  | About Store Log G   | Out 🛆      |
| Home Find Patient Find Result Find Document Find   | on CHI    |                    |                        |                             |             |                     | Patie  | nt ID:              | Go         |
| Configuration  | Exc       | ceptions M         | lgmt Secu              | urity Mainten               | ance Report | ing General         | Notifications  |                     |            |
| Home > Documents Uploaded  |           |                    | Deau                   | ante Uniondo                | d Co anala  |                     |  | User: admin on PJSS | sC14       |
|  |           |                    | Ducun                  | Processing                  | u search    |                     |  |                     |            |
| Page 1 V of 5 Document Select V  | IDs       | Service            | XML File<br>Date       | Stage<br>Reached            | Processed   | Status              | Description  |                     |            |
| XML FileName   | 71 0      | Local<br>Docs v2.3 | 2009-05-13<br>13:55:27 | Link Document<br>to Patient | ОК          | OK                  | Completed successfully 13/05/2009<br>13.55.35  |                     |            |
| Processing Select Stage  | 70 0      | Local<br>Docs v2.3 | 2009-05-13<br>13:53:04 | Document<br>Upload          | ок          | Unexpected<br>error | 13/05/2009 13.53.12 Could not find<br>specified stylesheet gateway-<br>discharge.xsl to upload.  |                     |            |
| Status Select V  | 69 c      | Local<br>Docs v2.3 | 2009-05-13<br>13:52:11 | Document<br>Upload          | ок          | Unexpected<br>error | 13/05/2009 13.52.16 Could not find<br>the specified Document   |                     |            |
| Description  | 68 g      | Local<br>Docs v2.3 | 2009-01-20<br>16:10:14 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 20/01/2009<br>16.11.56  |                     |            |
| Date/Time From Dete/Time To Dete/Time To Patient Information Include in Search Document to formation Include in Search | 67 C      | Local<br>Docs v2.3 | 2009-01-20<br>16:00:31 | XML Parse                   | New         | New                 | 20/01/2009 15.01.01XML Parsing<br>Errors Error ValidateXML: Error<br>validating Document SubCategory<br>against Clinical Index. Error<br>ValidateXML: Error validating<br>Document SubCategory against<br>Clinical Index - doesn't belong to<br>supplied Category. |                     |            |
| Document information   | 56 0      | Local<br>Docs v2.3 | 2008-10-28<br>22:13:50 | Link Document<br>to Patient | ОК          | ОК                  | Completed successfully 28/10/2008<br>22.14.03  |                     |            |
| Search Flag as New Flag as Actioned  | 55 0      | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ОК          | ОК                  | Completed successfully 28/10/2008<br>21.32.14  |                     |            |
| Delete Messages Clear Search   | 54 0      | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.13  |                     |            |
|  | 53 0      | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.13  |                     |            |
|  | 52 0      | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.13  |                     |            |
|  | 51 0      | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.13  |                     |            |
|  | 50        | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.12  |                     |            |
|  | 49        | Local<br>Docs v2.3 | 2008-10-28<br>21:29:57 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.12  |                     |            |
|  | 48        | Local<br>Docs v2.3 | 2008-10-28 21:29:56    | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.12  |                     |            |
|  | 47        | Local<br>Docs v2.3 | 2008-10-28<br>21:29:56 | Link Document<br>to Patient | ок          | ок                  | Completed successfully 28/10/2008<br>21.32.11  |                     |            |
| 4  |           |                    |                        |                             |             |                     |  |                     | >          |
| Done   |           |                    |                        |                             |             |                     | 🐻 😜 Internet   | 100%                | • • .:     |

#### Return to Index

## 2.10 UI Refresh - Exceptions parsed files

#### Background

This feature introduces improvements to the user-interface form design for the Exception management "parsed files" screen. Change scope includes:

- Change form layout to improve usability.
- Changes will be aligned with the Admin Styles guide
- Enhance workflow so that searches are maintained when returning to previous forms

#### Features

- Standard toolbar added
- Search form style standardised (same as "Find Patient" style)
- Searcy results header bar with pagination
- Form functions moved to actions dropdown menu on toolbar

#### Screenshots

#### NEW SCREEN

| SCI Stor                | e Paisley    |      |                       |           |                         |              |                |                     | My Settings About St  | ore L           |
|-------------------------|--------------|------|-----------------------|-----------|-------------------------|--------------|----------------|---------------------|---|-----------------|
| Home Find Pa            | tient        |      |                       |           |                         |              |                |                     | Patient ID:   |                 |
|                         |              | С    | onfiguration E        | xceptions | Mgmt Secur              | ity Maintena | ance Reportin  | ig General          |   |                 |
| Home > Parsed Fil       | es           |      |                       |           |                         |              |                |                     | User: ad  | lmin on P       |
| Search Options          | Search Clear | 38 R | ecords Returned       | Records   | Per Page 🛛 20 🗸         | View All     |                |                     | File Actions Select   | Action          |
| System Search 0         | ptions       | 12   |                       |           |                         |              |                |                     |   |                 |
| Source System           | ×            | ID   | Service Name          | Source    | Patient                 | СНІ          | Report Id      | Status              | Description   | Transa          |
| Service Name            | ¥            |      |                       | System    | Telenath1               |              |                |                     | ReadDBRecord Failed: This record  | 22/05/          |
| CHI Matched?            |              | 714  | TelepathTranslator    | Telepath  | MException              | 2204704652   | R,02.1000004.N | Parse Error         | requires to be split before it can be<br>parsed.  | 14:08           |
| Status                  | (All Errors) |      |                       |           |                         |              |                |                     | ReadDBRecord Failed: This record  |                 |
| Description             |              |      |                       |           |                         |              |                |                     | parsed.ReadDBRecord Failed: This  |                 |
| Transaction Date:       | *            | 712  | TelepathTranslator    | Telepath  | Telepath4               | 2810760578   | R,02.1000004.N | Parse Error         | be parsed.ReadDBRecord Failed: This   | 22/05/          |
| Transaction Date:<br>To | •            |      |                       |           | MException              |              |                |                     | record requires to be split before it can<br>be parsed.ReadDBRecord Failed: This<br>record requires to be split before it can | 14.02           |
| Match Rule              | ✓            |      |                       |           |                         |              |                |                     | be parsed.<br>ReadDBRecord Failed: This record  |                 |
| Match Action            | <b>~</b>     |      |                       |           |                         |              |                |                     | requires to be split before it can be   |                 |
| Discipline              | ¥            | 711  | TelepathTranslator    | Telepath  | Telepath3<br>MException | 2608742076   | R,02.1000004.N | Parse Error         | record requires to be split before it can   | 22/05/          |
| Requestor               | Search       |      |                       |           |                         |              |                |                     | be parsed.ReadDBRecord Failed: This<br>record requires to be split before it can  |                 |
| Requesting              | Search       |      |                       |           |                         |              |                |                     | be parsed.  |                 |
| Report Id               |              |      |                       |           | Telepath2               |              |                |                     | requires to be split before it can be   | 22/05/          |
| Patient Search Op       | otions       | /10  | l elepath i ranslator | lelepath  | MException              | 2406720233   | R,02.1000004.N | Parse Error         | record requires to be split before it can<br>be parsed.   | 14:02           |
| Patient Id              |              | 661  | TelepathTranslator    | Telepath  | Alan Brown              | 12198012     | R,02.0083024.M | Match Error         | Match Error: Exception Rule Match   | 20/05/          |
| Surname                 |              | 660  | TelepathTranslater    | Tologath  | Carol Dohoon            |              | D 02 0082024 M | Match Ecror         | Match Error: Exception Rule Match   | 20/05/          |
| Forename                |              | 000  | relepatin ranslator   | relepatri | Caror Dobson            |              | R,02.0083024.M | Hater Error         | Satisfied   | 16:23           |
| Date of Birth           | ~            | 659  | TelepathTranslator    | Telepath  |                         |              | R,02.0083024.M | Match Error         | Satisfied   | 16:23           |
| Postcode                |              | 630  | TelepathTranslator    | Telepath  | FNAME0001<br>SNAME0001  | 4291194645   | R,02.0087145.Y | Patient<br>Error    | Patient Error: More than one Patient<br>Match found   | 20/05/          |
| CHI                     |              | 622  | HomerTranslator       | Homer     |                         |              |                | Unexpected<br>Error | Parse Error: ProcessDBFile :  | 20/05/          |
| Other Patient Id        |              | 589  | XML40Translator       | Compas    | Secondary<br>Mergemain  | 191919191919 |                | Match Error         | Match Error: Exception Rule Match<br>Satisfied  | 19/05/<br>16:14 |
|                         |              | 588  | XML40Translator       | Compas    | Primary<br>Mergeman     | 1231231239   |                | Match Error         | Match Error: Exception Rule Match<br>Satisfied  | 19/05/<br>16:13 |
|                         |              |      |                       |           |                         |              |                |                     |   |                 |

### OLD SCREEN (for reference)

| Se SC             | I Store Pa                      | aisley                        |               |         |                 |          |             |           |         |               | My Settings | About Store |
|-------------------|---------------------------------|-------------------------------|---------------|---------|-----------------|----------|-------------|-----------|---------|---------------|-------------|-------------|
| Home              | Find Patient                    | Find Result                   | Find Document | Find on | CHI             |          |             |           |         |               | Patie       | ent ID:     |
|                   |                                 |                               | Configu       | ration  | Exceptions Mgmt | Security | Maintenance | Reporting | General | Notifications |             |             |
| Home >            | Parsed Files                    |                               |               |         |                 |          |             |           |         |               |             | User: admir |
| Source            | System                          | П сні                         | Matched?      |         |                 |          |             |           |         |               |             |             |
| Status            |                                 |                               | ~             |         |                 |          |             |           |         |               |             |             |
| Descrip           | tion                            |                               |               |         |                 |          |             |           |         |               |             |             |
| Transad<br>(dd/MM | tion Date/Time<br>/vvvv hh:mm:s | From s)                       |               |         |                 |          |             |           |         |               |             |             |
| Transad<br>(dd/MM | tion Date/Time<br>/yyyy hh:mm:s | To<br>s)                      |               |         |                 |          |             |           |         |               |             |             |
| Match R           | tule                            |                               |               | *       |                 |          |             |           |         |               |             |             |
| Match A           | ction                           |                               | ~             |         |                 |          |             |           |         |               |             |             |
| Patient           | ID                              |                               |               |         |                 |          |             |           |         |               |             |             |
| Surnam            | e                               |                               |               |         |                 |          |             |           |         |               |             |             |
| Forenar           | ne                              |                               |               |         |                 |          |             |           |         |               |             |             |
| Date Of<br>(dd/mm | Birth<br>Vyyyy)                 |                               |               |         |                 |          |             |           |         |               |             |             |
| Post Co           | de                              |                               |               |         |                 |          |             |           |         |               |             |             |
| СНІ               |                                 |                               |               |         |                 |          |             |           |         |               |             |             |
| PAS               |                                 |                               |               |         |                 |          |             |           |         |               |             |             |
| Other P           | atient ID                       |                               |               |         |                 |          |             |           |         |               |             |             |
| Discipli          | ne                              |                               | *             |         |                 |          |             |           |         |               |             |             |
| ReportI           | D                               |                               |               |         |                 |          |             |           |         |               |             |             |
| Se<br>Parse I/    | arch Flag A<br>essages Delete N | As New Flag /<br>Kessages Cle | As Actioned   |         |                 |          |             |           |         |               |             |             |

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## 2.11 UI Refresh - Exceptions uploaded files

#### Background

This feature introduces improvements to the user-interface form design for the Exception management "parsed files" screen. Change scope includes:

- Change form layout to improve usability.
- Changes will be aligned with the Admin Styles guide
- Enhance workflow so that searches are maintained when returning to previous forms

#### Features

- Standard toolbar added
- Search form style standardised (same as "Find Patient" style)
- Search results header bar with pagination
- Form functions moved to actions dropdown menu on toolbar

## Screenshots

New Screen

| SCI SCI           | Stor       | e Paisley        |       |        |                 |                   |          |                  |           |             | My Settings | About Store      |
|-------------------|------------|------------------|-------|--------|-----------------|-------------------|----------|------------------|-----------|-------------|-------------|------------------|
| Home              | Find Pat   | ient             |       |        |                 |                   |          |                  |           |             | Patier      | nt ID:           |
|                   |            |                  |       |        | Configuration   | Exceptions Mgmt   | Security | Maintenance      | Reporting | General     |             |                  |
| Home > U          | iploaded I | Files            |       |        |                 |                   |          |                  |           |             |             | User: admin o    |
| Search O          | Options    | Search           | Clear | S Reco | ords Returned   |                   |          |                  |           |             | File Actio  | ns Select Action |
| View Mes          | sages      | Source V         |       | ID     | Service         | File Name         |          | File Date        | Process   | ed Status   | D           | escription       |
|                   |            |                  | 1000  | 369    | TelepathFile2DB | Source.tlp        | 20,      | 05/2009 14:02:54 | OK        | Parse Error | Parse Error | 20/05/2009 14.0  |
| Source St         | ystem      |                  | ×     | 368    | TelepathFile2DB | Source.tlp        | 20,      | 05/2009 13:50:35 | OK        | Parse Error | Parse Error | 20/05/2009 13.5  |
| File Name         |            |                  |       | 360    | TelepathFile2DB | Copy of Source.tl | 20,      | 05/2009 13:43:46 | OK        | Parse Error | Parse Error | 20/05/2009 13.4  |
| D                 |            |                  |       | 358    | TelepathFile2DB | Source.tlp        | 20       | 05/2009 13:41:21 | OK        | Parse Error | Parse Error | 20/05/2009 13.4  |
| Processed         | u          |                  |       | 357    | TelepathFile2DB | Source.tlp        | 20,      | 05/2009 13:37:18 | OK        | Parse Error | Parse Error | 20/05/2009 13.3  |
| Status            |            | (All Errors) 🛛 🗸 |       |        |                 |                   |          |                  |           |             |             |                  |
| Descriptio        | on         |                  |       |        |                 |                   |          |                  |           |             |             |                  |
| Date Proc<br>From | cessed     |                  | \$    |        |                 |                   |          |                  |           |             |             |                  |
| Date Proc         | cessed To  |                  | *     |        |                 |                   |          |                  |           |             |             |                  |

#### Old Screen (for reference)

| <mark>∽</mark> r SC | I Store Pa     | aisley          |                  |         |                  |                 |                    |         |                      |       |              | My Settings                     | About Store    |
|---------------------|----------------|-----------------|------------------|---------|------------------|-----------------|--------------------|---------|----------------------|-------|--------------|---------------------------------|----------------|
| Home                | Find Patient   | Find Result     | Find Document    | Find or | CHI              |                 |                    |         |                      |       |              | Patie                           | ent ID:        |
|                     |                |                 | Configu          | ration  | Exceptions Mg    | mt Security     | Maintenance        | Repor   | ting Ge              | neral | Notification | 5                               |                |
| Home >              | Uploaded Files |                 |                  |         |                  |                 |                    |         |                      |       |              |                                 | User: admin o  |
| Printer             | Friendly Expo  | ort             |                  |         |                  |                 |                    |         |                      |       |              |                                 |                |
| View                |                | Source          |                  | ID      | Service          | Fil             | e Name             |         | File Date            | Proce | essed Status | Desc                            | ription        |
| Messag<br>Source    | les            |                 |                  | 139     | MasterlabFile2DB | GUMMHC_SCI_200  | 08070133743_26_14  | 4.txt 1 | 3/05/2009<br>1:52:09 | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| System              | n<br>ne        |                 |                  | 138     | MasterlabFile2DB | wwwc_sci_2008   | 070133743_26_14.   | xt 1    | 3/05/2009<br>1:52:09 | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| Process             | sed            |                 | ~                | 137     | MasterlabFile2DB | WWCAHC_SCI_20   | 08070133743_26_1   | 4.txt 1 | 3/05/2009<br>1:52:08 | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| Status              |                |                 | ~                | 136     | MasterlabFile2DB | WFPC_SCI_20080  | 70133743_26_14.tx  | t 1     | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| Descrip             | tion           |                 |                  | 135     | MasterlabFile2DB | VPWWC_SCI_200   | 8070133743_26_14   | txt 1   | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| (DD/MI              | M/YYYY)        |                 |                  | 134     | MasterlabFile2DB | VFPC_SCI_200807 | 70133743_26_14.txt | 1       | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| (DD/M               | M/YYYY)        |                 |                  | 133     | MasterlabFile2DB | RFPC_SCI_200807 | 70133743_26_14.txt | 1       | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| Page                | 1 💌 of 7       |                 |                  | 132     | MasterlabFile2DB | MWWC_SCI_2008   | 070133743_26_14.t  | xt 1    | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
| (                   | Search         | Flag As New     | Flag As Actioned | 131     | MasterlabFile2DB | MSH_SCI_200807  | 0133743_26_14.txt  | 1       | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
|                     | L.             | Delete Messages | Clear Search     | 130     | MasterlabFile2DB | MFPC_SCI_200807 | 70133743_26_14.txt | 1       | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
|                     |                |                 |                  | 129     | MasterlabFile2DB | LWWC_SCI_20080  | 070133743_26_14.b  | d 1     | 3/05/2009            | ок    | ок           | Completed successfu<br>11.52.17 | lly 13/05/2009 |
|                     |                |                 |                  | 1.7.9   | MasterlahEile2DR | LHWING SCL 2008 | 070122742 26 14    | 1       | 3/05/2009            | or    | OK           | Completed successful            | lly 13/05/2009 |

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## 2.12 UI Refresh - Module permissions

#### Background

Support a function to allow permissions to be maintained from the database rather than the current hard-coded radio button implementation.

The revised edit module permissions screen for creating a permission template is shown below. This screen is accessed from the main menu: Security > Module permissions templates. From this screen an authorised user can:

- Add a new module permissions template
- Edit an existing module permissions template

#### Features

Add a new module permissions template

#### Navigate to the module permissions template view:

From the main menu select "Security > Module Permissions"

| Sc SC    | I Store P      | aisley         | ,             | My S        | ettings Abc | out Store    | Log Out  |
|----------|----------------|----------------|---------------|-------------|-------------|--------------|----------|
| Home     | Find Patient   | Find Result    | Find Document | Find on CHI | Patient ID: |              | Go       |
| Config   | uration E      | xceptions Mgm  | t Security    | Maintenance | Reporting   | General      | Notifica |
| Home > N | Aodule Permiss | sion Templates |               |             | Use         | er: admin or | PJSSCI6  |
| ⇔ +      |                |                |               |             |             |              |          |
| Module   | Permission     | Templates      |               |             |             |              |          |
| 2 Recor  | ds Returned    |                |               |             |             |              |          |
|          | Template N     | lame           | Updated By    | Li          | ast Updated | D            | elete    |
| Restrict | edUserTempla   | te a           | admin         | 18/03/2009  | 22:31:58    | 0            | elete    |
| Test Te  | mplate         |                | admin         | 20/03/2009  | 9 12:20:02  | 0            | elete    |

#### Click the "add" icon

| <del>ି</del> ନ୍ଦୁ SC | I Store Pa                 | isley         |                      |         |                 |          |             |           |         |               | My Settings       | About Stor |
|----------------------|----------------------------|---------------|----------------------|---------|-----------------|----------|-------------|-----------|---------|---------------|-------------------|------------|
| Home                 | Find Patient               | Find Result   | Find Document        | Find or | CHI             |          |             |           |         |               | Patie             | nt ID:     |
|                      |                            |               | Configu              | ration  | Exceptions Mgmt | Security | Maintenance | Reporting | General | Notifications |                   |            |
| Home > I             | Module Permissio           | n Templates : | > Edit Module Permi  | ssion   |                 |          |             |           |         |               |                   | User: adn  |
| 🗢 🖌                  |                            |               |                      |         |                 |          |             |           |         |               |                   |            |
| _ Permi              | ission Template            |               |                      |         |                 |          |             |           |         |               |                   |            |
|                      |                            | Те            | mplate Name          |         |                 |          | Updated By  |           |         |               | Updated On        |            |
|                      |                            | Restri        | ictedUserTemplate    |         |                 |          | admin       |           |         | 19            | /02/2009 22:28:25 |            |
| Edit Mo              | odule Permissio            | on            |                      |         |                 |          |             |           |         |               |                   |            |
| Catego               | ct Category<br>pry Patient | ~             |                      |         |                 |          |             |           |         |               |                   |            |
| Find                 | and View Patient           | ts 🗌 🗖 Find o | on CHI Search        |         |                 |          |             |           |         |               |                   |            |
| View                 | v Patient Address          | es 🔽 Find o   | on CHI - Save to Sto | ore     |                 |          |             |           |         |               |                   |            |
| View                 | v Patient History          | Find o        | on CHI - Test Match  |         |                 |          |             |           |         |               |                   |            |
| View                 | v Patient IDs              | Point         | in Time View         |         |                 |          |             |           |         |               |                   |            |
| View                 | v Patient Names            | 🗹 Maint       | ain Patient Consent  |         |                 |          |             |           |         |               |                   |            |
| View                 | v Patient ADTs             | 🔽 Break       | k Glass              |         |                 |          |             |           |         |               |                   |            |
| View                 | v Patient Telecom          | ns 🔽 View     | Anonymous Patients   | s       |                 |          |             |           |         |               |                   |            |
| View View            | v Patient Treevier         | w 🗆 Show      | Service Name Colu    | imn     |                 |          |             |           |         |               |                   |            |

For each permission template, the administrator can select and view each permissions category using the dropdown menu. The individual permissions for each category can be modified using the checkboxes. Changes can be saved using the "save" button on the toolbar.

Applying module permissions template to a user

The option to add a module permission template to a user is accessed from the "module Permissions" button on the "Add user to group" page. On select the system navigated to the "edit module permissions" page.

| Security Permissions     |                  |
|--------------------------|------------------|
| Module Permissions       | View Permissions |
| vailable Data Restrictio | ons              |
| lideAllDoB               |                  |
| HideCRN                  |                  |
| HideDoBonPatientMaster   | >>               |
| HideFemalePatients       |                  |
| HideHaematology          | <                |
| lideHSDocs               |                  |
| lideRadiology            | < <              |
|                          |                  |
On display of the "edit module permissions" page there is a function to "apply Template.

Select the template from the dropdown list and click apply. Changes to the applied template can then be made in each module permissions category. And saved to the user using the "save" button on the toolbar.

|                           | configuration exceptions right          |
|---------------------------|---|
| ome > Users > Add User to | Group > Edit Module Permission          |
| >                         |   |
| User                      |   |
| User Name                 | Friendly Name                           |
| bart5                     | bart                                    |
|                           |   |
| Edit Module Permission    |   |
| - Select Category         | Apply Template                          |
| Category Patient          | Template ALLOW ALL V Apply              |
|                           | (None)                                  |
| Find and View Patients    | Find on CHI ScalaLLOW ALL               |
| View Patient Addresses    | Find on CHI - Sa RestrictedUserTemplate |
| View Patient History      | Test Template                           |
|                           |   |
| View Patient IDs          | Point in Time View                      |
| View Patient Names        | 🗌 Maintain Patient Consent              |
| <b>—</b>                  | - · · ·                                 |
|                           |   |

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## 2.13 View service name in patient details view

#### Background

Change to allow the Service Name to be displayed as a new column within the grid view for the demographic tabs (Address/Names/Telecoms) on the PatientDetails page.

This change is to assist with admin procedures to determine resolve data quality issues.

#### Features

The Service ID column shows the FiletoDatabase "Service name" which is understood to be a plain English description of the source system.

The display of the service name within the Demographic tabs will depend on both Site Level and User Level permissions.

At Site Level there is a new system setting "ShowServiceName".

At User Level there is a new module permission "View Service Name"

If a user has the relevant permissions then this new column will have a heading of "Service Name" and be displayed as the last column in the grid.

The "Service Name" values displayed for each row in this column will relate to the source system that provided the specific address/name/telecom information displayed on the row.

### Notes

There is no way of knowing the Source of existing data in these tables, therefore the new "Service Name" column will remain blank for the vast majority of addresses/names/telecoms data. This issue was raised with the user and it was agreed that this is not a problem.

The service name relevant to the source system that is feeding in the demographic data will be populated into the Service\_ID column each time a new entry is inserted into:

- t14\_Address
- t14\_PersonalName
- t14\_Telecom

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# 2.14 Miscellaneous other New Functionality / Resolved Issues

| Build    | Feature  | Description  |  |  |  |  |  |
|----------|--|--|--|--|--|--|--|
| 5.1.0925 | New<br>Functionality   | Scottish Ambulance Service – support been added for SAS reports  |  |  |  |  |  |
| 5.1.0925 | New<br>Functionality   | Tracker 6559 - V5.1 Admin UI: Remove User History Audit<br>Report from the User Maintenance Form And Create a New<br>"Patient Audit" Report                              |  |  |  |  |  |
| 5.1.0925 | Resolved Tracker 7096 & 7137 - Web Services: Version 2.3 and 4.1<br>Issue Document Throws An Error When Surname Is Populated<br>Is Not |  |  |  |  |  |  |
| 5.1.0925 | Resolved<br>Issue  | Tracker 6899 - Display of Discharge Letters in SCI Store Differs to their Display in Gateway   |  |  |  |  |  |
| 5.1.0925 | Resolved<br>Issue  | Tracker 7095 - Manual Match (Parsed File): Error Occurs When<br>We Do A Full Name Search Without Entering A Surname Or Use<br>An Apostrophe Character In Search Criteria |  |  |  |  |  |
| 5.1.0925 | Resolved<br>Issue  | Tracker 7104 - CHI Broadcast Exception When Updating a<br>Merged Patient   |  |  |  |  |  |
| 5.1.0925 | Resolved<br>Issue  | Tracker 7110 - Patient update issue when using C/D in matching rule and where the matched patient is a merged patient  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 6017 - V6.0 Move ID To Top of Selection Criteria On<br>Find Patient Search Screen  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7147 - Find Documents: Change to Restrict Inefficient Searches   |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7179 - User Notes: Add a User Notes Field To User<br>Maintenance Screen  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7201 – Find Documents: Remove 'Additional Text' field  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7232 - Module Permissions: Allow Aggregate User and<br>Permission Groups Module Permissions to be Displayed Against<br>User Module Permissions                   |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7267 - Add Virology to Telepath Discipline List  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7236- Glue - Allow Referral 2.6 message types to be uploaded from SCI Gateway into SCI Store   |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7237- Glue - Allow Discharge 2.7 message types to be uploaded from SCI Gateway into SCI Store  |  |  |  |  |  |
| 5.1.0929 | New<br>Functionality   | Tracker 7238- Glue - Allow Clinical Letters 1.1 message types to be uploaded from SCI Gateway into SCI Store   |  |  |  |  |  |
| 5.1.0929 | Resolved<br>Issue  | Tracker 7233 - Bulk merging - Unhandled Exception When<br>Forename Contains NULL   |  |  |  |  |  |

| 5.1.0933 | New                  | Trackers 7194 – 7198 Inc – V6.0 - Revision Of Display Of Result   |  |  |  |  |  |
|----------|----------------------|---|--|--|--|--|--|
| 5.1.0933 | Resolved             | Tracker 6905 – Tree View - Date Displayed For Doc's Should Be<br>Document Date  |  |  |  |  |  |
| 5.1.0933 | Resolved<br>Issue    | Tracker 7132 - Adding New Sample To Report With Attachments Fails   |  |  |  |  |  |
| 5.1.0933 | Resolved<br>Issue    | Tracker 7139 - GP's Registered To More Than 1 Practice Is Not<br>Handled  |  |  |  |  |  |
| 5.1.0933 | Resolved<br>Issue    | Tracker 7333 - Demog Feed - "After Patient Matching"<br>respecification   |  |  |  |  |  |
| 5.1.0937 | New<br>Functionality | Add support for new dataset - Treatment Logs  |  |  |  |  |  |
| 5.1.0937 | New<br>Functionality | Tracker 6799 - Extend Result Audit Report to Display Remote<br>Audit Information  |  |  |  |  |  |
| 5.1.0937 | New<br>Functionality | Tracker 7317 - SCI Store To Be Amended To Read The<br>Set/Profile Read Code From 23/9 For The Telepath Interface                                  |  |  |  |  |  |
| 5.1.0937 | New<br>Functionality | Tracker 7378 - Extend Patient Audit Report to Remote Audit<br>Information   |  |  |  |  |  |
| 5.1.0937 | Resolved<br>Issue    | Tracker 7255 – Interface Maintenance – Prevent the creation of a new service with the same service name and service type as an existing service   |  |  |  |  |  |
| 5.1.0941 | New<br>Functionality | Tracker 7336 - Extend the Reference Data Upload Page for Specialty and Facility   |  |  |  |  |  |
| 5.1.0941 | New<br>Functionality | Tracker 7241 - Remove IDFormat Help and IDType Help buttons<br>From The DemogFeed Interface Configuration   |  |  |  |  |  |
| 5.1.0941 | Resolved<br>Issue    | Tracker 7017 - Uploaded Files - Exported Result Data Is Not<br>Displayed In the Correct Format  |  |  |  |  |  |
| 5.1.0941 | Resolved<br>Issue    | Tracker 7416 - Document Upload Service Processing Documents<br>Multiple Times   |  |  |  |  |  |
| 5.1.0945 | New<br>Functionality | Add Treatment Log Web Application Screens   |  |  |  |  |  |
| 5.1.0945 | Resolved<br>Issue    | Tracker 7462 - Find Document Screen: Change "Identifier" to<br>"Patient ID"   |  |  |  |  |  |
| 5.1.0945 | Resolved<br>Issue    | Tracker 7505 - Results Display - Result Status is not displaying<br>when viewing results "Ungrouped"  |  |  |  |  |  |
| 5.1.0945 | Resolved<br>Issue    | Tracker 7508 - Parsed File Screen - Rename label 'Patient Id' to<br>'Store Patient Id' To Be Consistent With Naming On 'Parsed<br>Message' Screen |  |  |  |  |  |

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# 3. Version 6.0

## 3.1 Find on CHI

## Introduction

The Find Patient function now has the capability to allow a user to:

- Search for patients on the CHI database via the Search Provider functionality available on the 'Find Patient' screen and to save patient details to Store from the 'Patient Details' screen
- Test a patient match for a CHI patient against an existing Store patient
- Refresh the patient demographics of a Store patient with CHI database details via a new 'Refresh Demographics from CHI' action on the 'Patient Details' screen.

This functionality is intended to replace the existing 'Find on CHI' functionality.

#### **Module Permissions**

The following two module permissions are used to administer the new 'Find on CHI' functionality.

| Module Permission         | Description   | Module Permission<br>Category |
|---------------------------|---|-------------------------------|
| Find on CHI Save to Store | Allows a user to save CHI<br>patients viewed via the CHI<br>Search Provider to Store.<br>Also allows a user to refresh<br>local Store patient<br>demographics from the Chi<br>database. | Patient                       |
| Find on CHI Test Match    | Allows a user to perform a test patient match against patient details retrieved from a CHI search.  | Patient                       |

## Auditing

The actions for inserting / updating and refreshing patient demographic details are audited and can be viewed on the 'Parsed Files' page under the 'Exceptions Management' menu.

## Configuration of the CHI Lookup interface

## Prerequisites

A CHI Lookup interface requires to be created in Store which points to the national CHI database.

A CHI Search Provider must be created in SCI Store.

User accounts that require this function must be given permission to the CHI Search Provider via the 'Remote Data Source Users' functionality.

The system setting 'ShowRemoteDatasources' needs to set to True - this will display the CHI data source on the 'Find Patient' page for those users configured with access to the CHI Search Provider.

User accounts must be granted the appropriate module permissions described in the table above.

## Constraints

The CHI Demographics checkbox should never be enabled against this interface.

Patient matching rules which contain lines with 'CD' enabled should not be used. (This is because both of these scenarios invoke a lookup to the CHI database. This interface is designed to automatically lookup the Chi database – forcing a second lookup is likely to produce unpredictable results and / or errors).

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## 3.2 Flag duplicate patients

## Overview

This function allows an end user to report patient records that they suspect are duplicates. The reported duplicates can then be reviewed by an administrator user and marked as rejected or completed. Actual merging of duplicate patients reported by this functionality must be manually processed where appropriate.

#### Module Permissions

3 module permissions (See Figure 1) can be used to administer the "Flag Duplicate Patients' function. They can be accessed from the 'Patient' Category on the 'Edit Module Permission' screen.

| Module Permission                     | Description   | Module Permission<br>Category |
|---------------------------------------|---|-------------------------------|
| Flag Duplicate Patients               | Allows a user to flag a patient as being a duplicate              | Patient                       |
| Search Duplicate Patient<br>Requests  | Allows a user to search duplicate patient requests                | Store Maintenance             |
| Process Duplicate Patient<br>Requests | Allows a use to process /<br>action duplicate patient<br>requests | Store Maintenance             |

#### Figure 1: Flag Duplicate Patients Module Permissions

### **System Settings**

Using the "MaximumDuplicatePatients" system setting, the administrator can constrain the number of duplicate patients that can be flagged at any one time.

| Module Permission        | Description  |
|--------------------------|--|
| MaximumDuplicatePatients | Constrain the number of duplicates that can be reported by an n authorised user. |
|                          | The default value is 5 with a lower and upper range between 2 and 10.            |

### Flagging a potential duplicate

Users who have been granted the 'Flag Duplicate Patients' module permission will have access to a 'Patient Action' on the 'Find Patient' search screen called 'Flag Duplicate Patients' (See Figure 2). This action will allow the user to select patients from the returned search results and mark them as duplicates in the system. This is done by selecting the corresponding checkbox at the end of the grid row.

| SCI Store Paisley                      |              |                                 |            |       | My Settings About  | Store Lo        | og Out |
|--|--------------|---------------------------------|------------|-------|--|-----------------|--------|
| Home Find Patient Find Result Find     | Document Fi  | nd on CHI Find Treatmer         | nt Log     |       | Patient ID:  |                 | Go     |
| Configu                                | ration Ex    | ceptions Mgmt Securit           | ty Mainter | nance | e Reporting General Notifications  |                 |        |
| Home > Find Patient                    |              |                                 |            |       | User:  | admin on P.     | JSSCI  |
| When flagging duplicate patients a mir | imum of two  | patients must be selected       | ł.         |       |  |                 |        |
| Search Options Search Clear            | 23 Records R | leturned Records Per I          | Page 20 🗸  | View  | All Patient Action Flag Dupl   | icatePatients 💊 | Go     |
| Identifier contains 🗸 s                | 12           |                                 |            |       |  |                 |        |
| Surname equals                         | CHI          | Name                            | DOB        | Sex   | Address  | Postcode        |        |
|  | 0101796773   | Steven Carl                     | 01/01/1979 | м     | 1 BURNS AVE PAISLEY  | PA2 ORE         |        |
| Forenames equals                       | 0101705093   | JOHN COLE                       | 01/01/1970 | м     | 32 Bank Street Rutherglen GLASGOW  | G73 3AU         |        |
| Date Of Birth                          | 1305672011   | MILES DYSON                     | 13/05/1967 | М     | 117 JERVISTON ST NEW STEVENSTON MOTHERWELL ML1 4XF                           |                 |        |
| Sex 💌                                  | 0101675666   | Ted Giffen                      | 01/01/1937 | F     | 1 BURNS AVE PAISLEY  | PA2 ORE         | •      |
| Postcode                               | 1005786844   | AllFields Homer                 | 10/05/1978 | м     | 100 Dorset Street Glasgow  | G1 1HN          |        |
| Advanced Search Options ¥              | 1001808568   | MYPATIENT_1 HOMER               | 10/01/1980 | F     | 212 BATH STREET GLASGOW  | G1 1HN          |        |
| Available Data Sources                 | 1701752816   | Telepath JUNIOR                 | 17/01/1975 | м     | ADDR1.0015 ADDR2.0015 ADDR3.0015 ADDR4.0015                                  | G43 6GT         |        |
| Local 🔽 23 Results                     | 1231231239   | Secondary Mergemain             | 17/01/1983 | М     | 16 Secondary Road Secondarytown Secondarycounty Glasgow                      | G17 5GF         |        |
| Local 2.3                              | 1206712600   | Secondary Mergemain             | 17/01/1983 | м     | 8 Primary Road Glasgow   | G13 3AU         |        |
| Local 4.1                              | 1231231230   | xml6Secondary<br>Mergemain      | 17/01/1983 | м     | 16 Secondary Road Secondarytown Secondarycounty Glasgow                      | G17 5GF         | Γ      |
| Local 6.0                              | 1206712600   | Primary Mergeman                | 17/01/1983 | м     | 8 Primary Road Glasgow   | G13 3AU         |        |
|  | 1406502677   | NUNIT MlabTest                  | 14/06/1950 | F     | 23 Test Street Test Estate Testtown West Test Testland                       | EH54 6FT        |        |
|  | 1407526847   | Testpatient MlabTest            | 14/07/1952 | F     | Address Line 1 Address Line 2 Address Town Address County<br>Address Country | G44 3WS         |        |
|  | 0101709993   | JOE MOLE                        | 01/01/1970 | м     | 32 Bank Street Rutherglen GLASGOW  | G73 3AU         |        |
|  | 0307768732   | firstforename<br>NotPresentLink | 03/07/1976 | м     | address line 1 address line 2 address line 3 address line 4                  | G73 8WR         |        |
|  | 0101675234   | Susan Roberts                   | 01/01/1945 | F     | 261 HIGH STREET Hillside PAISLEY   | PA1 2HG         |        |
|  | 1207677558   | Carl Smith                      | 12/07/1967 | М     | 12 Church Road Aberdeen  | AB11 9ZZ        |        |
|  | 3452347894   | MISYS SOCKETTEST1               | 10/05/1930 | М     | 52 TEST Place Socket Town Socketville G44 3TN                                |                 |        |
|  | 0007500100   | Forename333                     | 00/07/1050 | c     | Addressel Addressel Addressel  | DET ONIM        | -      |

Figure 2: Patient Action: Flag Duplicate Patients

Once selected, a confirmation dialog (Figure 3) is displayed to the user summarising the details of the selected patients and requesting that they input a reason for flagging the selected patients as duplicates.

| Sci Sci     | Store Pa      | aisley    |                |             |                               |              |        |         |            |  | My Sel               | ttings At    | out Store          | Log Out |
|-------------|---------------|-----------|----------------|-------------|-------------------------------|--------------|--------|---------|------------|--|----------------------|--------------|--------------------|---------|
|             |               |           |                |             |                               |              |        |         |            |  |                      |              |                    | Go      |
|             |               |           |                |             |                               |              |        |         |            |  |                      |              |                    |         |
| Home > Find | d Patient     |           |                |             |                               |              |        |         |            |  |                      | Us           | er: admin on       | PJSSCI6 |
| Search Opt  | tions         | Search    | Clear 23       | Records R   | eturned                       | Records Per  | Page 2 | 0 🗸     | View       |  | Patient              | Action Flag  | Duplicate Patients | Ƴ Go    |
| Identifier  | contains      | v s       | 1              | 2           |                               |              |        |         |            |  |                      |              |                    |         |
| Surname     | equals        | ~         |                | СНІ         | Na                            | me           | DO     | B       | Sex        |  | Address              |              | Postcod            | е 🔳     |
| Forenames   | equals        | ~         | 01             | 01796773    | Steven Carl                   |              | 01/01/ | 1979    | М          | 1 BURNS AVE PAISLEY                            |                      |              | PA2 ORE            |         |
| Date Of Bir | th            |           | Confirm dup    | licate pati | ents                          |              |        |         |            |  | x                    |              | G73 3AU            |         |
| Sev         |               |           | CHI            | N           | ame                           | DOB          | Sex    |         |            | Address  |                      | VELL MLI 47  |                    |         |
| Postcode    |               |           | 1231231239     | Seconda     | ry<br>vin                     | 17/01/1983   | м      | 16 Seco | ondar<br>" | y Road Secondarytown Seco                      | ndarycounty          |              | PA2 ORE            |         |
| Advanced S  | Search Option | 15        | 1206712600     | Seconda     | ŗy                            | 17/01/1983   | м      | 8 Prima | arv Ro     | pad Glasgow                                    |                      |              | G1 1HN             |         |
|             |               |           |                | Mergema     | ain .                         |              |        |         |            | 1  |                      | 2015         | C42.6CT            |         |
| Available E | ata Sources   | 00.0      | Reason for fla | gging these | e patients as d               | iuplicates:* |        |         |            |  |                      | J015         | 043 505            |         |
| Local       | V             | 23 Result | 6              |             |                               |              |        |         |            |  |                      | bunty Glasg  | ow GI/SGF          |         |
| Local 2.3   |               |           |                |             |                               |              |        |         |            |  |                      |              | G13 3AU            | ×       |
| Local 4.1   |               |           |                |             |                               |              |        |         |            |  | ~                    | ounty Glasg  | ow G17 5GF         |         |
| Local 6.0   |               |           |                |             |                               |              |        |         |            |  | Proceed              |              | G13 3AU            |         |
|             |               |           | 14             | 06502677    | NUNIT MlabT                   | est          | 14/06/ | 1950    | F          | 23 Test Street Test Estate Te                  | esttown West Test    | Testland     | EH54 6FT           |         |
|             |               |           | 14             | 07526847    | Testpatient N                 | 4labTest     | 14/07/ | 1952    | F          | Address Line 1 Address Line<br>Address Country | 2 Address Town A     | ddress Count | y G44 3WS          |         |
|             |               |           | 01             | 01709993    | JOE MOLE                      |              | 01/01/ | 1970    | М          | 32 Bank Street Rutherglen G                    | GLASGOW              |              | G73 3AU            |         |
|             |               |           | 03             | 07768732    | firstforename<br>NotPresentLi | e<br>nk      | 03/07/ | 1976    | М          | address line 1 address line 2                  | 2 address line 3 add | dress line 4 | G73 8WR            |         |
|             |               |           | 01             | 01675234    | Susan Rober                   | ts           | 01/01/ | 1945    | F          | 261 HIGH STREET Hillside P/                    | AISLEY               |              | PA1 2HG            |         |
|             |               |           | 12             | 07677558    | Carl Smith                    |              | 12/07/ | 1967    | М          | 12 Church Road Aberdeen                        |                      |              | AB11 9Z            | z 🗆     |
|             |               |           | 34             | 52347894    | MISYS SOCK                    | ETTEST1      | 10/05/ | 1930    | М          | 52 TEST Place Socket Town                      | Socketville G44 3T   | 'N           |                    |         |
|             |               |           | 08             | 07520128    | Forename33<br>Surname333      | 3<br>13      | 08/07/ | 1952    | F          | Address1 Address2 Address                      | 3                    |              | PST 9NW            |         |

Figure 3: Confirmation dialogue

#### **Find Duplicate Patient Requests Screen**

This screen allows an administrator to search for duplicates that have been reported by an end user.

To access this function a user must have the 'Search Duplicate Patient Requests' module permission. The screen is accessible 'Maintenance > Find Duplicate Patient Requests' menu (Figure 4).

| SC:      | I Store                  | Paisley          |                 |                                      |             |           | My Sett | ings About Store | Log Out    |
|----------|--------------------------|------------------|-----------------|--------------------------------------|-------------|-----------|---------|------------------|------------|
| Home     | Find Patient Find Result |                  | Find Document   | Find Document Find on CHI Find Treat |             | .og       |         | Patient ID:      | Go         |
|          | C                        | onfiguration     | Exceptions Mgmt | Security                             | Maintenance | Reporting | General | Notifications    |            |
| Home > F | ind Duplicate            | Patient Requests | 5               |                                      |             |           |         | User: admir      | on PJSSCI6 |
| Search ( | Options                  | Search C         | lear            |                                      |             |           |         |                  |            |
| Request  | Date From*               | 20/10/2009 🗸     |                 |                                      |             |           |         |                  |            |
| Request  | Date To*                 | 19/11/2009 💙     |                 |                                      |             |           |         |                  |            |
| Request  | Status                   | Outstanding ⊻    |                 |                                      |             |           |         |                  |            |
| Usernam  | ne                       |                  |                 |                                      |             |           |         |                  |            |

Figure 4: Find Duplicate Patient Requests

## **Form Functions**

Function to search on:

- Date range (request submitted)
- Status (Outstanding, completed, rejected)
- User id (who made the request)

Default form values:

- Date range: last 30 days
- Status: Outstanding requests

#### Date range error

An error message will be displayed if a search is submitted with a date range greater than 365 days (Figure 5).

| D:  |  |  |  |  |  |  |  |  |  |  |  |
|---|--|--|--|--|--|--|--|--|--|--|--|
| Go<br>Notifications   |  |  |  |  |  |  |  |  |  |  |  |
| Home > Find Duplicate Patient Requests User: admin on PJSSCI6 |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |
|   |  |  |  |  |  |  |  |  |  |  |  |

Figure 5: Error: date range greater than 365 days

## Wide-ranging search warning

A search greater than 30 days and less than or equal to 365 days will display a warning box asking the user if they wish to continue (Figure 6).

| SCI Store Pa   | aisley                  |                             |   |   |                         |                                    | Log Out          |           |            |
|--|-------------------------|-----------------------------|---|---|-------------------------|------------------------------------|------------------|-----------|------------|
| Home Find  | Find                    | Find                        | F   | ind on  | Find                    | Treatment                          | Patient I        | (D:       | Go         |
| Configuration  | Exception               | ns Mamt                     | Security                                      | Mainten   | ance                    | Reportina                          | General          | Notific   | ations     |
| Home > Find Duplicate F<br>Search Options<br>Request Date From* 1<br>Request Date To* 1<br>Request Status<br>Username ad | You are a<br>this searc | about to rur<br>h could hav | n a search wii<br>ve an adverse<br>wish<br>OK | :h wide-ran<br>effect on s<br>to continue<br>Cancel | ging sea<br>system<br>? | arch criteria. R<br>performance. I | unning<br>Do you | : admin ( | on PJSSCI6 |

Figure 6: Wide-ranging search warning

Form actions:

- OK the search will be run
- Cancel the search will not be run.

The search will generate a list of duplicate patient requests in the system based on the selection criteria (Figure 7).

| SCI SCI    | Store P   | aisley         |         |             |            |                  |          |                 |           |            |                 | My Settings | About Store    | Lo |             |  |
|------------|---|----------------|---------|-------------|------------|------------------|----------|-----------------|-----------|------------|-----------------|-------------|----------------|----|-------------|--|
| Home I     | Find Patient  | Find Result    | Find De | ocument     | Find on CH | II Find Treatmen | t Log    |                 |           |            |                 | Patie       | ent ID:        |    |             |  |
|            |   |                |         | Configura   | ition I    | Exceptions Mgmt  | Security | Maintenance     | Reporting | General    | Notifications   |             |                |    |             |  |
| Home > Fin | ome > Find Duplicate Patient Requests User: admin on P1 |                |         |             |            |                  |          |                 |           |            |                 |             |                |    |             |  |
| Search Op  | otions  | Search Cle     | ar      | 3 Records P | Returned   |                  |          |                 |           |            |                 |             |                |    |             |  |
| Request Da | ate From* 2   | 20/10/2009 🗸   |         | Re          | quested l  | by               | Numbe    | r of Duplicates |           | Da         | te of Request 🔺 |             | Request Status |    |             |  |
| Request Da | ate To* 1   | * 19/11/2009 * |         | 19/11/2009  |            |                  | admin    |                 |           | 5          |                 |             | 19/11/2009     |    | Outstanding |  |
|            | Request Date To   |                |         | admin       |            |                  | 4        |                 |           | 19/11/2009 |                 |             | Outstanding    |    |             |  |
| Username   | tatus   | Jutstanding Y  | _       |             | admin      |                  |          | 4               |           |            | 19/11/2009      |             | Outstanding    |    |             |  |

Figure 7 "Find Duplicate Change Requests", Search Results

The search results grid will show the following information

- Requested by User who made the request
- Number of duplicates How many patients are flagged as duplicates
- Date of request date request submitted

• Request Status - outstanding, completed rejected

The sort order default is oldest first. It is possible to sort the columns by data of request.

#### **Duplicate Patient Request Details screen**

The details of the duplicates can be viewed by selecting entries from the returned search results, which then loads the 'Duplicate Patient Request Details' screen (figure 8) where the full details can be viewed.

| SCI Sto         | ore I   | Paisley          |                     |              |              |              |                   |                   |            |               | My Settings | About Store   | Log Out       |
|-----------------|---------|------------------|---------------------|--------------|--------------|--------------|-------------------|-------------------|------------|---------------|-------------|---------------|---------------|
| Home Find       | Patient | Find Result      | Find Document       | Find on CHI  | Find Treatm  | ent Log      |                   |                   |            |               | Patie       | ent ID:       | Go            |
|                 |         |                  | Configur            | ation Ex     | ceptions Mgm | t Security   | Maintenance       | Reporting         | General    | Notifications |             |               |               |
| Home > Find Du  | plicate | Patient Requests | > Duplicate Patient | Request Deta | ails         |              |                   |                   |            |               |             | User: adm     | in on PJSSCI6 |
| ⇔ ≙   ₩ ◀       |         | P                |                     |              |              |              |                   |                   |            |               |             | Actions Proce | ss 💌 Go       |
| - Request De    | taile   |                  |                     |              |              |              |                   |                   |            |               |             | Select        | Action        |
| Requested B     | y       | admin            | Request Date        | 19/11/200    | 9 10:45:08   | Request Reas | on test           |                   |            |               |             | Proces        | 5             |
|                 |         |                  |                     |              |              |              |                   |                   |            |               |             |               |               |
| Completion De   | tails   |                  |                     |              |              |              |                   |                   |            |               |             |               |               |
| Request Statu   | IS      | Outstanding      | Actioned By         | N/A          |              | Date Action  | ed N/A            |                   | Actioned C | omments       |             |               |               |
|                 |         |                  |                     |              |              |              |                   |                   |            |               |             |               |               |
| Duplicate Patie | nts     |                  |                     |              |              |              |                   |                   |            |               |             |               |               |
| CH              | t i     |                  | Name                |              | DOB          | Sex          |                   |                   | Addres     | s             |             | Pos           | tcode         |
| 010157          | 5025    | ANN ADAM         | ISON                |              | 01/01/1957   | F            | 2 GREEN STREET    |                   |            |               |             |               |               |
| 010169          | 6779    | Charlie Au       | gust                |              | 01/01/1969   | м            | 12 Church Road A  | berdeen           |            |               |             | AB119ZZ       |               |
| 020675          | 1222    | MARY BAN         | KTEST               |              | 02/06/1975   | F            | 21 ROSLYN CRES    | RATHESAY TEST     | r          |               |             | PS209HT       |               |
| 130561          | 8017    | David Ban        | ner                 |              | 13/05/1961   | м            | 165 Motherwell Ro | ad Belshill       |            |               |             | ML014SD       |               |
| 783013          | 5222    | Alison Blac      | :k                  |              | 21/10/1952   | F            | 1 Garnock Place K | ilbirnie Ayrshire | Scotland   |               |             | KA251DS       |               |

Figure 8: Request details screen

#### **Process Duplicate Patient Requests**

When the 'Duplicate Patient Request Details' screen is loaded, users who have been granted the 'Process Duplicate Patient Requests' will be able to 'process' the records, by changing their status to either 'rejected' or 'completed' and an appropriate comment can be added. This can be achieved by selecting the "flag" icon from the toolbar or selecting process from the "actions" dropdown list (Figure 9).

| CI Store Pa                       |                                     |                         |                     |                   |                 |
|-----------------------------------|-------------------------------------|-------------------------|---------------------|-------------------|-----------------|
| Home Find Patient                 |                                     |                         |                     |                   | Patient ID:     |
|                                   |                                     |                         |                     |                   |                 |
| Home > Find Duplicate Pa          | atient Requests > Duplicate Patient | Request Details         |                     |                   | User: admin or  |
|                                   |                                     |                         |                     |                   | Actions Process |
| Request Details<br>Requested By a | dmin Request Date                   | : 19/11/2009 10:45:08 R | tequest Reason test |                   |                 |
| Completion Details                |                                     |                         |                     |                   |                 |
| Request Status O                  | utstanding Actioned By              | N/A                     | Date Actioned N/A   | Actioned Comments |                 |
| Duplicate Patients                |                                     |                         |                     |                   |                 |
| СНІ                               | Name                                | DOB                     | Sex                 | Address           | Postcod         |
| 0101575025                        | ANN ADAMSON                         | 0 Update Req            | uest Status         | ×                 |                 |
| 0101696779                        | Charlie August                      | 0 Status                | Completed V         |                   | AB119ZZ         |
| 0206751222                        | MARY BANKTEST                       | 0 Comments              |                     |                   | PS209HT         |
| 1305618017                        | David Banner                        | 1                       |                     |                   | ML014SD         |
| 7830135222                        | Alison Black                        | 2                       |                     | and               | KA251DS         |
|                                   |                                     |                         |                     | Process           |                 |

Figure 9: Update Request Status

Form details:

- Status (dropdown) possible values completed or rejected
- Comments (input text box) comments can only be added if the status is rejected.

#### **Printer Friendly View**

A printer friendly view of the duplicate patient request details screen can be accessed from the patient actions toolbar.

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## 3.3 Manual Document uploads (Admin)

## **Module Permissions**

To assign an end user with access to the Manual Document Upload feature:

- Navigate to module permissions maintenance screen
- Assign "Manual Document Upload" module permission to the user account

#### Interface configuration

A manual document upload interface configuration must be created and set to active.

Note: If there are multiple manual document upload interface configurations, only can be set to active.

## New service definition

To create a manual document upload service definition:

- Select "Configuration > Interfaces " from the main menu.
- Click "+" (Add)
- Select 'ManualDocumentUpload' from the drop down list
- The system navigates to the "New Service Definition" Page (Shown below)

|                   |                  |                | -                  |                    |          |             |           |         |               |             |               |            |
|-------------------|------------------|----------------|--------------------|--------------------|----------|-------------|-----------|---------|---------------|-------------|---------------|------------|
| <del>ऽ</del> r sc | I Store Pa       | aisley         |                    |                    |          |             |           |         |               | My Settings | About Store   | Log Out    |
| Home              | Find Patient     | Find Result    | Find Document      | Find Treatment Log |          |             |           |         |               | Patie       | ent ID:       | Go         |
|                   |                  |                | Configuratio       | n Exceptions Mgmt  | Security | Maintenance | Reporting | General | Notifications | ;           |               |            |
| Home > I          | Maintain Interfa | ces > New Inte | rface              |                    |          |             |           |         |               |             | User: admin o | on PJSSCI6 |
| ¢   🔒             |                  |                |                    |                    |          |             |           |         |               |             |               |            |
| New Se            | ervice Definitio | on             |                    |                    |          |             |           |         |               |             |               |            |
| Service           | Туре             | ManualD        | DocumentUpload 🗸 🗸 | ]                  |          |             |           |         |               |             |               |            |
| Service           | Name *           |                |                    | ]                  |          |             |           |         |               |             |               |            |
| Status            |                  | € On           | C off              |                    |          |             |           |         |               |             |               |            |
|                   |                  |                |                    |                    |          |             |           |         |               |             |               |            |

## Amend service definition

To amend a service definition:

- Select "Configuration > Interfaces " from the main menu.
- Select a manual document upload interface from the service list
- The system navigates to the "Amend Service Definition" Page (Shown below)

| Sc:            | I Store Pa        | aisley         |               |             |         |             |             |           |         |              | My Settings | About Store        | Log Out    |
|----------------|-------------------|----------------|---------------|-------------|---------|-------------|-------------|-----------|---------|--------------|-------------|--------------------|------------|
| Home           | Find Patient      | Find Result    | Find Document | Find on CHI | Find Tr | eatment Log |             |           |         |              | Pat         | ient ID:           | Go         |
|                |                   |                | Configuration | Exception   | s Mgmt  | Security    | Maintenance | Reporting | General | Notification | s           |                    |            |
| Home > N       | 4aintain Interfac | ces > Amend In | iterface      |             |         |             |             |           |         |              |             | User: admin        | on PJSSCI6 |
| < <b>⊳   ×</b> | 2 19              |                |               |             |         |             |             |           |         |              |             | Actions Select Act | tion 🗸 Go  |
| Amend          | Service Defin     | ition          |               |             |         |             |             |           |         |              |             |                    |            |
| Service        | ID                |                | 49            |             |         |             |             |           |         |              |             |                    |            |
| Service        | Туре              |                | ManualDocu    | umentUpload | ~       |             |             |           |         |              |             |                    |            |
| Service        | Name *            |                | RemoteFile N  | IDU         |         |             |             |           |         |              |             |                    |            |
| Status         |                   |                | € On          | C off       |         |             |             |           |         |              |             |                    |            |

## Service Definition Fields

| Service ID   | System Generated unique ID for the Service Definition     |
|--------------|---|
| Service Type | The Service Type must be set to "ManualDocumentUpload".   |
| Service Name | Unique name for the service, input by administrator user. |

| Status | Boolean status to enable / disable the service. |
|--------|---|
|        |   |

#### **Configure interface**

To configure a manual document upload interface

- Select " " from the toolbar on the amend service definition screen
- Enter details as required
- Select " 🚽 to save details

| SCI Store Paisley                     |                       |               |            |               |             |           |         |              | My Settings   | About Store   | Log Out    |
|---------------------------------------|-----------------------|---------------|------------|---------------|-------------|-----------|---------|--------------|---------------|---------------|------------|
| Home Find Patient Find Result         | Find Document         | Find on CHI   | Find Tre   | atment Log    |             |           |         |              | Pati          | ent ID:       | Go         |
|                                       | Configuration         | Exception     | s Mgmt     | Security      | Maintenance | Reporting | General | Notification | IS            |               |            |
| Home > Maintain Interfaces > Amend Ir | nterface > Amend Ma   | nual Document | t Upload   |               |             |           |         |              |               | User: admin ( | on PJSSCI6 |
| ⇔ <b></b>                             |                       |               |            |               |             |           |         |              | Actions Selec | et Action     | ❤ Go       |
| Manual Document Upload                |                       |               |            |               |             |           |         |              |               |               |            |
| Document Source*                      | RemoteFile Manual Doc | ument Upload  |            |               |             |           |         |              |               |               |            |
| Document Extension*                   | .doc, .pdf, .txt      |               |            |               |             |           |         |              |               |               |            |
| Document Size Limit*                  | 4,096 kB              |               |            |               |             |           |         |              |               |               |            |
| Allow Future Attestation Date         | No 🗸                  |               |            |               |             |           |         |              |               |               |            |
| Document Storage                      | C Local SCI Store     | C Remote SC   | CI Store D | B 🤨 File Serv | ver         |           |         |              |               |               |            |
| File Server URL*                      | \\pjssci12\SCI        | Docs          |            |               | < >         |           |         |              |               |               |            |

| Document source               | Specify Document source                         |
|-------------------------------|---|
| Document Extension            | Specify valid extensions                        |
| Document Size Limit           | Specify Document Size Limit                     |
| Allow future attestation date | Determine if future attestation date is allowed |
| Document Storage              | Define storage location                         |
| File Server URL               | Specify file server URL                         |

## Return to Index

# 3.4 Manual Document uploads (End User)

## **Getting started**

A document can be uploaded to a patient record by selecting the document upload button from the toolbar on the Patient Details screen (shown below). The button icon is white with a blue arrow.

| Sc Sc              | I Store P                               | aisley         |                       |              |                         |           |                                 |              |             | My            | Settings     | About Store   | Log Out  |
|--------------------|---|----------------|-----------------------|--------------|-------------------------|-----------|---------------------------------|--------------|-------------|---------------|--------------|---------------|----------|
| Home               | Find Patient                            | Find Result    | Find Document         | Find on CHI  | Find Trea               | tment Log |                                 |              |             |               | Patien       | t ID:         | Go       |
|                    |   |                | Configuration         | Exceptio     | ns Mgmt                 | Security  | Maintenance                     | Reporting    | General     | Notifications |              |               |          |
| Home > I           | Patient Details                         |                |                       |              |                         |           |                                 |              |             |               |              | User: admin o | n PJSSCI |
| ¢ 🔒                | 19 👌 🏹                                  | 2              |                       |              |                         |           |                                 |              |             | Acti          | ons Select A | ction         | ♥ Go     |
| Patier<br>Pa<br>Ke | nt<br><b>tient Name</b><br>ith Richards | CHI<br>8124331 | Date Of<br>31 18/12/1 | Birth<br>943 | Date of De<br>25/09/200 | ath<br>17 | GP<br>HOIDA, ELLEN              | (<br>DOLLAI  | P Practice  | Con           | sultant      | Ward/Loca     | ition    |
| Results            | Documents                               | Demographics   | ADTs IDs Audr         | Tree View    | Treatment Lo            | g         |                                 |              |             |               |              |               |          |
| - Filte<br>Discip  | r By<br>line                            | Selec          | Processed In The      | Last H       | ours 💙                  | Go        | isplay Mode<br>roup By Report 🕫 | Ungroup By R | eport O     |               |              |               |          |
| 1 Reco             | ord Returned                            |                |                       |              |                         |           |                                 |              |             |               |              |               |          |
| Rep                | oort Id                                 | Discipline     | Processe              | d At         | Sample                  |           | Sample Collected                | i In         | vestigation | Date I        | Reported     | Notes         |          |
| 37                 | 8865G                                   | Radiology      | 03/11/2009 1          | 9:36:38      | Radiology               | / 1       | 3/02/2007 13:45:0               | 10           | Radiology   | 04/05/20      | 07 11:31:00  |               |          |
|                    |   | <              | ⁄2∂∎                  |              |                         | _         |                                 |              |             |               |              |               |          |

## Entering the Manual Document upload details

Selecting the manual document upload button from the toolbar will navigate to the Manual Document upload Details form (Shown below)

| <b>₽</b> SC | CI Store Pa                  | aisley         |                          |              |                        |            |                    |             |            |               | My Settings | About Store   | Log Out   |
|-------------|------------------------------|----------------|--------------------------|--------------|------------------------|------------|--------------------|-------------|------------|---------------|-------------|---------------|-----------|
| Home        | Find Patient                 | Find Result    | Find Document            | Find on CHI  | Find Tre               | atment Log |                    |             |            |               | Patie       | ent ID:       | Go        |
|             |                              |                | Configuration            | Exceptio     | ns Mgmt                | Security   | Maintenance        | Reporting   | General    | Notifications | 5           |               |           |
| Home >      | Patient Details :            | > Manual Docu  | iment Upload             |              |                        |            |                    |             |            |               |             | User: admin o | on PJSSCI |
| ¢           |                              |                |                          |              |                        |            |                    |             |            |               |             |               |           |
| - Patie     | ent                          |                |                          |              |                        |            |                    |             |            |               |             |               |           |
| Pa<br>Ke    | atient Name<br>eith Richards | CHI<br>1812433 | Date Of<br>131 18/12/1   | Birth<br>943 | Date of De<br>25/09/20 | eath<br>07 | GP<br>HOIDA, ELLEN | G<br>DOLLAF | P Practice | NTRE          | Consultant  | Ward/Loca     | ation     |
| Manua       | al Document U                | pload Details  | ;                        |              |                        |            |                    |             |            |               |             |               |           |
| Docum       | ent Title*                   |                |                          |              |                        |            |                    |             |            |               |             |               |           |
| Docum       | ent Revision                 | 00             | )1                       |              |                        |            |                    |             |            |               |             |               |           |
| Docum       | ent Specialty*               | S              | elect Document Specialty | ··· 🗸        |                        |            |                    |             |            |               |             |               |           |
| Organis     | sation Name*                 |                | S                        | sarch        |                        |            |                    |             |            |               |             |               |           |
| Clinical    | I Index Category             | y* Si          | elect Clinical Category  | *            |                        |            |                    |             |            |               |             |               |           |
| Clinical    | I Index Sub-Cate             | egory*         |                          | ~            |                        |            |                    |             |            |               |             |               |           |
| Attesta     | tion Date*                   |                |                          |              |                        |            |                    |             |            |               |             |               |           |
| Conser      | nt*                          | Y              | es 🔒                     |              |                        |            |                    |             |            |               |             |               |           |
| Sensiti     | vity*                        | S              | ensitive 💌               |              |                        |            |                    |             |            |               |             |               |           |
| Origina     | ating HCP                    |                | S                        | sarch        |                        |            |                    |             |            |               |             |               |           |
| Attestir    | ng HCP                       |                | S                        | sarch        |                        |            |                    |             |            |               |             |               |           |
| Additio     | nal Text                     |                |                          |              |                        |            | ~                  |             |            |               |             |               |           |
|             |                              |                |                          |              |                        |            | ~                  |             |            |               |             |               |           |
|             |                              |                | Submit                   | Details Res  | et Form                |            |                    |             |            |               |             |               |           |

## Below is a summary of the manual document upload details form data.

| Item               | Description  | Туре              |
|--------------------|--|-------------------|
| Document title     | Enter a name for the document (mandatory)                    | Field (Input)     |
| Document revision  | Automatically generated by the system (mandatory)            | Field (read Only) |
| Document Specialty | Select document specialty from dropdown list. (mandatory)    | Field (Input)     |
| Organisation Name  | Select organisation (From pop-up list selector); (mandatory) | Field (Input)     |

| Clinical Index category | Select Clinical index category (mandatory)                         | Field (Input) |
|-------------------------|--|---------------|
| Attestation date        | Attestation date and time (mandatory)                              | Field (Input) |
| Consent                 | Signify consent status (Yes / No)<br>(mandatory)                   | Field (Input) |
| Sensitivity             | signify the sensitivity of the document (mandatory)                | Field (Input) |
| Originating HCP         | Search for origination HCP (Optional)                              | Field (Input) |
| Attesting HCP           | Search for attesting HCP (Optional)                                | Field (Input) |
| Additional text         | Add any additional note text to accompany the document. (Optional) | Field (Input) |
| Submit Details          | Click button to navigate the file upload form.                     | Button        |
| Reset form              | clear all form data  | Button        |

## Note:

• Only one file can be uploaded at a time

- Only plain text or binary (e.g. MS Office, PDF etc) documents can be uploaded
- XML files and associated style sheets are excluded

For a new document the document revision number will default to 001, for a document revision it will default to the previous version + 1. i.e. 003 -> 004

The screen below shows the "pop-up" function on the manual document upload details screen to search for and select an organisation.

| SCI Store Paisley                                  |  |   |  |   |                          |                         |               | Log Out   |
|--|--|---|--|---|--------------------------|-------------------------|---------------|-----------|
| Home Find Patient Find Res                         |  |   |  |   |                          |                         | ent ID:       | Go        |
|  |  |   |  |   |                          |                         |               |           |
| Home > Patient Details > Manual D                  | ocument Upload                         |   |  |   |                          |                         | User: admin o | n PJSSCI6 |
|  |  |   |  |   |                          |                         |               |           |
| Patient O<br>Patient Name O<br>Keith Richards 1812 | CHI Date Of Birth<br>433131 18/12/1943 | Date of Death<br>25/09/2007   | GP<br>HOIDA, ELLEN                                 | GP<br>DOLLAR I                          | Practice<br>HEALTH CENTI | <b>Consultant</b><br>RE | Ward/Loca     | tion      |
| Manual Document Upload Deta                        | ails                                   |   |  |   |                          |                         |               |           |
| Document Title*                                    |  |   |  |   |                          |                         |               |           |
| Document Revision                                  | 001                                    |   |  |   |                          |                         |               |           |
| Document Specialty*                                | AH - Neurology                         |   |  |   |                          |                         |               |           |
| Organisation Name*                                 | royal Search                           |   |  |   |                          |                         |               |           |
| Clinical Index Category*                           | Select Clinical Category               | Overeinstige Security Results                                       |  | 0                                       |                          |                         |               |           |
| Clinical Index Sub-Category*                       |  | Organisation Search Results   |  | C                                       | -                        |                         |               |           |
| Attestation Date*                                  | Å                                      | (N101H) Aberdeen Royal Infirm<br>(N028T) Aberdeen Royal Infirm      | ary - Cornhill Road Aber<br>arv Ambulance ASO - Fi | deen<br>orresterhill Road A             |                          |                         |               |           |
| Consent*   | Yes 💌                                  | (E121H) Bethlem Royal Hospital                                      | - Beckenham Kent                                   | frica                                   |                          |                         |               |           |
| Sensitivity*                                       | Sensitive 💌                            | (Y104H) Dumfries & Galloway F                                       | Royal Infirmary - Banker                           | id Road Dumfries                        |                          |                         |               |           |
| Originating HCP                                    | Search                                 | (Y102H) Dumfries & Galloway F<br>(Y023T) Dumfries Royal Infirma     | Royal Infirmary - Materni<br>ry Ambulance ASO - Ba | ty Unit Bankend Rc<br>Inkend Road Dumfr |                          |                         |               |           |
| Attesting HCP                                      | Search                                 | (T102H) Dundee Royal Infirmary<br>(S016T) Ediphurah Poyal Infirmary | / - Barrack Road Dunde<br>and Ambulance ASO Li     | e<br>Hie France Cresce                  |                          |                         |               |           |
| Additional Text                                    |  | (V010T) Falkirk & District Royal                                    | Infirmary Ambulance AS                             | SO - Major's Loan F                     |                          |                         |               |           |
|  |  |   |  |   |                          |                         |               |           |

Upload file

Having clicked on the Submit Details button on the manual document upload details screen, the screen will refresh with the following additional fields:

| Item                | Description   | Туре              |
|---------------------|---|-------------------|
| Document Location   | Displays the selected path of the document location (read only).  | Field             |
| Browse              | Function to search file directory to determine<br>the document location. (Note: The document<br>location field that the path is displayed in is<br>read only. The user must use the "Browse…"<br>Button to locate the document) | Button            |
| Document Identifier | Automatically populated with the document filename and extension once the document is selected.   | Field (read only) |
| Upload document     | Selecting this button will upload the selected file to SCI Store and associate it with the patient record.  | Button            |

This is illustrated in the screen below. The manual document upload details are set to read only when the upload file form is displayed.

| Home > Patient Details > M   | Ianual Document U  | pload  |                             |                    |                                     |            | User: admin on PJSSCI |
|--|--|--|-----------------------------|--------------------|-------------------------------------|------------|-----------------------|
| <b>\$</b>  |  |  |                             |                    |                                     |            |                       |
| Patient<br>Patient Name<br>Keith Richards  | CHI<br>1812433131  | Date Of Birth<br>18/12/1943  | Date of Death<br>25/09/2007 | GP<br>HOIDA, ELLEN | GP Practice<br>DOLLAR HEALTH CENTRE | Consultant | Ward/Location         |
| Manual Document Uplo   | ad Details   |  |                             |                    |                                     |            |                       |
| Document Title*<br>Document Revision<br>Document Specialty*<br>Organisation Name*<br>Clinical Index Category*<br>Clinical Index Sub-Catego<br>Attestation Date*<br>Consent*<br>Sensitivity*<br>Originating HCP<br>Attesting HCP<br>Additional Text | Document<br>OO1<br>A5 - Clini<br>Cricition F<br>Cricition F<br>Cricition F<br>Fundal Int<br>12/11/200<br>Yes W<br>Sensitive<br>Sensitive<br>Maximum file size<br>apperbr | title<br>cal Pharmacology & TT V<br>toyal Hospital Clear<br>Forms V<br>9 142629 0<br>Search<br>Search<br>for upload is |                             | 6                  |                                     |            |                       |
| -  | The valid extension<br>upload are:<br>*.doc<br>*.pdf<br>*.txt  | n types for<br>etails  | Reset Form                  | >                  |                                     |            |                       |
| Document Location* 🥝<br>Document Identifier  |  |  |                             | Browse             |                                     |            |                       |
|  |  | Upload Docu  | ment                        |                    |                                     |            |                       |

A tool tip is provided to illustrate the document size limit and valid file extensions (shown below)

|         |   |  | Search       |
|---------|---|--|--------------|
|         |   |  | Search       |
|         | Maximum<br>4096Kb.<br>The valid of<br>upload are<br>*.doc<br>*.pdf<br>*.txt | file size for upload is<br>extension types for<br>a: | etails       |
| :ion* 🕜 |   |  |              |
| ifier   |   |  |              |
|         |   |  | Upload Docur |

Having selected "upload document" button, the system will upload the selected document to SCI Store. The following message is displayed if the upload was successful:



Immediately after upload the system will navigate to the patient details screen with default focus on the Document tab that will now have the uploaded document listed in the grid view. (Shown below):

| SC:      | I Store P       | aisley         |                      |             |               |           |                |           |              |              | My Sett | ings      | About Store | Log Out    |
|----------|-----------------|----------------|----------------------|-------------|---------------|-----------|----------------|-----------|--------------|--------------|---------|-----------|-------------|------------|
| Home     | Find Patient    | Find Result    | Find Document        | Find on CHI | Find Treatr   | ment Log  |                |           |              |              |         | Patient   | t ID:       | Go         |
|          |                 |                | Configuration        | Exceptio    | ns Mgmt 🛛 :   | Security  | Maintenance    | Reporting | General      | Notification | 15      |           |             |            |
| Home > P | Patient Details |                |                      |             |               |           |                |           |              |              |         |           | User: admin | on PJSSCI6 |
| ¢ 🗛      | 19 🗟 🔳 🖻        | )              |                      |             |               |           |                |           |              |              | Actions | Select Ad | ction       | V Go       |
| O Docu   | ment succes     | sfully uploade | ł                    |             |               |           |                |           |              |              |         |           |             |            |
| Patier   | tient Name      | СНІ            | Date Of              | Birth       | Date of Deat  | th        | GP             |           | GP Practice  |              | Consult | ant       | Ward/Lo     | cation     |
| Kei      | th Richards     | 18124331       | 31 18/12/1           | 943         | 25/09/2007    | н         | OIDA, ELLEN    | DOLU      | AR HEALTH CE | INTRE        |         |           |             |            |
| Results  | Documents       | Demographics   | ADTs IDs Audt        | Tree View   | Treatment Log |           |                |           |              |              |         |           |             |            |
| - Filter | ву              |                |                      |             |               |           |                |           |              |              |         |           |             |            |
| Catego   | ory All Catego  | ries           | Sub Category         |             |               | 🖌 🗆 Seard | h history Go   |           |              |              |         |           |             |            |
| 1 Reco   | rd Returned     |                |                      |             |               |           |                |           |              |              |         |           |             |            |
| Ti       | tle Re          | v.             | Category             |             | opecialty     | Doc       | ument Date     | Sen       | sitivity     | Last Acces   | sed     | View      | Notes       | Linked     |
| fgdte    | ertert 00       | 1 Imag         | ging / Nuclear Medic | ine I       | Neurology     | 10/11     | /2009 14:23:51 |           | S            |              |         | View      |             | -          |

## **Revise uploaded document**

To revise an existing document that has been uploaded via the manual route:

- Navigate to the Document information page for the uploaded document
- Select the manual document icon from the toolbar

(The system will replace the read only document metadata field set with the Manual Document upload details form (shown below))

| Home       Find Patient       Find Document       Find On CH1       Find Treatment Log       Patient 10:       Ioi         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Notifications         Nome       Patient       Decument Information > Manual Document Upload       User: admin on PJSSCIE         Patient       Patient Name       CH1       Date of Birth       Date of Death       CP       GP Practice       Consultant       Ward/Location         Current Specified Document       18/12/1943       25/09/2007       HOIDA, ELLEN       DOLLAR HEALTH CENTRE       Ward/Location         Obuilt       Category       Document Revision       002       Document Specialty:       Select Document Specialty:       V         Nuclear Medicine       Date       Organisation Name*       Search       Clinical Index Category:       V         Nuclear Medicine       Date       Organisation Date*       Version       Version       Version         Document Organisation       Date       Organisation Date*       Version       Version       Version         Document Revision       Document Revision       Document Secialty:       Select Dirucal Category:       Version         Nuclear Medicine       Date       Corent*<  | SC SC            | I Store Pa                          | isley           |                           |              |                          |            |                         |              |              |               | My Settings | About Store | Log Out    |
|--|------------------|-------------------------------------|-----------------|---------------------------|--------------|--------------------------|------------|-------------------------|--------------|--------------|---------------|-------------|-------------|------------|
| Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Notifications         Home > Patient Details > Document Information > Manual Document Upload       User: admin on PJSSCIE         Patient       Patient Mame       CHI       Date of Birth       Date of Death       GP       GP Practice       Consultant       Ward/Location         Patient       Patient Mame       CHI       Date of Birth       Date of Death       GP       GP Practice       Consultant       Ward/Location         Current Specified Document       Title       Document Identifier       Document Revision       002       Document Revision       002         Document Age       Document Specially       Select Document Specially       Select Clinical Category       Select Clinical Category <th>Home</th> <th>Find Patient</th> <th>Find Result</th> <th>Find Document</th> <th>Find on CHI</th> <th>Find Trea</th> <th>atment Log</th> <th></th> <th></th> <th></th> <th></th> <th>Pati</th> <th>ent ID:</th> <th>Go</th>   | Home             | Find Patient                        | Find Result     | Find Document             | Find on CHI  | Find Trea                | atment Log |                         |              |              |               | Pati        | ent ID:     | Go         |
| Home > Patient Details > Document Information > Manual Document Upload       User: admin on PJSSCIE         Patient Name<br>Keith Richards       CHI       Date of Birth       Date of Death       CP       CP Practice       Consultant       Ward/Location         Current Specified Document       18/12/1943       25/09/2007       HOIDA, ELLEN       DOLLAR HEALTH CENTRE       Ward/Location         Current Specified Document       Title       Document Upload Details       Document Identifier       Document Revision       002         Document Addition       Document Specialty."       Select Discument Specialty       Organisation Name®       Select Discument Specialty       Vertical Specialty         Sub-Category       Clinical Index Sub-Category."       Select Clinical Category       Vertical Category <th></th> <th></th> <th></th> <th>Configuration</th> <th>Exceptio</th> <th>ns Mgmt</th> <th>Security</th> <th>Maintenance</th> <th>Reporting</th> <th>General</th> <th>Notifications</th> <th></th> <th></th> <th></th>  |                  |                                     |                 | Configuration             | Exceptio     | ns Mgmt                  | Security   | Maintenance             | Reporting    | General      | Notifications |             |             |            |
| Current Specified Document       Date of Birth 18/12/1943       Date of Death 25/09/2007       GP Practice DolLAR HEALTH CENTRE       Consultant       Ward/Location         Current Specified Document       Tilde fightertet       Document Upload Details       Document Tile*       Document Tile*       Document Specialty.*       Select Document Specialty.*       OO2         Document Addrine       Document Specialty.*       Select Document Specialty  | Home >           | Patient Details >                   | Document Info   | prmation > Manual Do      | ocument Uplo | ad                       |            |                         |              |              |               |             | User: admin | on PJSSCI6 |
| Patient<br>Keth Name       CHI<br>1812433131       Date of Birth<br>18/12/1943       Date of Death<br>25/09/2007       GP       GP Practice<br>DoLLAR HEALTH CENTRE       Consultant       Ward/Location         Current Specified Document<br>Title<br>fgdtertet       The Annual Document Upload Details       Document Jentifier       Document Identifier       Document Revision       002         Document Ade<br>Document Ade<br>Ocument Revision<br>001       Organisation Name**       Select Document Specialty.**       Select Discultare Ade<br>Ocument Revision       Organisation Name**       Select Clinical Category.**         Nuclear Medicine<br>Date<br>2009-11:01 14:23:51       Consent*       Yes ✓       Select Clinical Category*       Select Clinical Category.**         Nuurology       Originiation HCP       Originiating HCP       Search       Additional Text       Search         Additional Text       Unight Inter       Search       Interview       Interview       Interview  | <b>(</b> 2       |                                     |                 |                           |              |                          |            |                         |              |              |               |             |             |            |
| Patient Name       CHI       Date of Birth       Date of Death       CP       GP Practice       Consultant       Ward/Location         Keith Richards       18/12/13/43       18/12/19/43       25/09/2007       HOIDA, ELLEN       DOLLAR HEALTH CENTRE       Ward/Location         Current Specified Document       Title       Fourment Journal (Consultant Ward/Location)       Document Journal (Consultant Ward/Location)       Document Journal (Consultant Ward/Location)       Ward/Location)         Document Identifier       Document Title*       Document Title*       Document Specialty*       Select Document Specialty       V         Document Revision       O02       Document Specialty*       Select Discultate Specialty       V <t< td=""><td>- Patie</td><td>nt</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>  | - Patie          | nt                                  |                 |                           |              |                          |            |                         |              |              |               |             |             |            |
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| Clinical Index Category     Select Clinical Category       Sub-Category     Clinical Index Sub-Category       Nuclear Medicine     Clinical Index Sub-Category       Date     Clinical Index Sub-Category       209-11:01 4/23:51     Consent*       Recipient     Sensitivity"       Document Specialty     Originating HCP       Dummers Royal Infirmary Ambulance     Attesting HCP       Asport Bankend Road Dumfri     Additional Text  | Cateo            | 054                                 |                 |                           | Organisatio  | on Name*                 |            |                         | Search       |              |               |             |             |            |
| Sub_Category     Clinical Index Sub-Category*       Nuclear Medicine     Attestation Date*       2009-11:01 14:23:51     Consent*       Pocument Specialty     Sensitivity*       Neurology     Originating HCP       Document Organisation     Attesting HCP       Document Organisation Type     Attesting HCP       Additional Text     Search  | Imagir           | na                                  |                 |                           | Clinical Ind | lex Category             | <b>y*</b>  | Select Clinical Categor | ry 💌         |              |               |             |             |            |
| Nuclear Medicine     Attestation Date       Date     Consent*       2009-11:01 24:23:51     Consent*       Document Specialty     Sensitivity*       Neurology     Originating HCP       Document Organisation     Attesting HCP       Document Read Durin'i     Attesting HCP       Additional Text     Search  | Sub-C            | ategory                             |                 |                           | Clinical Inc | lex Sub-Cate             | egory*     |                         | ~            |              |               |             |             |            |
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| Neurology     Originating HCP     Search       Document Organisation     Attesting HCP     Search       Asso - Bankend Road Dumfri     Additional Text     Additional Text   | Docur            | nent Specialty                      |                 |                           | Sensitivity' | •                        |            | Sensitive 🗸             |              |              |               |             |             |            |
| Document Organisation     Attesting HCP       Doumfries Royal Infirmary Ambulance     Additional Text       Asso- Bankand Road Dumfri     Additional Text  | Neurol           | logy                                |                 |                           | Originating  | HCP                      |            |                         | Search       |              |               |             |             |            |
| Dumfries Royal Infirmary Ambulance<br>ASO - Banken Road Dumfri<br>Document Organisation Type<br>Hospital   | Docur            | nent Organisat                      | tion            |                           | Attesting H  | CP                       |            |                         | Search       |              |               |             |             |            |
| Hospital Pour Daniel Court Cou | Dumfr            | ies Royal Infirma<br>Rankand Road F | ary Ambulance   |                           | Additional   | Text                     |            |                         |              |              |               |             |             |            |
| Hospital   | Docur            | nent Organisat                      | tion Type       |                           | Additional   | - CAL                    |            |                         |              |              |               |             |             |            |
|  | Hospit           | al                                  |                 |                           |              |                          |            |                         |              |              |               |             |             |            |
|  |                  |                                     |                 |                           |              |                          |            |                         |              |              |               | ~           |             |            |
| Submt Details Reset Form   |                  |                                     |                 |                           |              |                          |            | Su                      | bmit Details | Reset Form   |               |             |             |            |

Enter the required document information and click "submit details"

(The file upload form will be shown)

- Select file from local PC or file server
- Select upload document button

## Return to Index

## 3.5 Patient search logic

#### Overview

This release introduces new functionality to apply different search rules based on the context of the user-initiated search.

The context of a search may differ depending on the search criteria invoked. The two possible patient search contexts are:

- A Current Patient List that matches on the search criteria
- Specific patients that matches on the search criteria

The table below summarises the relationship between the patient search context and the patient search logic.

| Context              | Description  | Search logic                     |
|----------------------|--|----------------------------------|
| Current Patient List | The user enters / selects<br>criteria that is intended to<br>produce a list of current<br>patients that match the<br>search criteria | Search master patient only       |
| Specific Patients    | The user enters / selects<br>criteria that is intended to<br>find specific patients that<br>match the search criteria                | Search master and child records. |

## **Current Patient List Context**

In this context the user is only interested in a list of current patients. Child records are not relevant.

The search criteria relevant to this context are:

- GP
- GP Practice
- Ward
- Consultant
- Hospital

By limiting the search to master patients only a list of the patients that currently belong to the search criteria input can be returned (e.g. GP of Registration).

#### **Specific Patients Context**

In this context, the user does not necessarily know that the specific patient they are looking for has been merged and may have specified search criteria that relates to a child record. This means that the search logic will be applied to master and child records that match on the search criteria. Only the master record will be displayed in the search results list.

The search criteria relevant to this context are:

- Patient demographic data (E.g. surname, date of birth, etc)
- Patient result data (E.g. discipline, investigation, etc)

By allowing this type of search to include master and child patients the requirements for this context can be met and the system will return a list of patients that will aid the user in finding the specific patient they are looking for.

For any child patients returned by this search, the related master patient details will be displayed within the search results list.

## Find patient search logic

#### Search master records only (Current patient list context)

A search on master record only will be invoked if the search criteria contain one or more of the following patient list context search criteria shown in the diagram below.



#### Search master and child records (specific patient context)

A search criterion that relates to specific patient context is shown in the diagram below. If the user inputs or selects search criteria for one or more of these, a search on both master and child records will be invoked.



## Multiple search criteria and combined context types

When multiple search criteria are used, each individual search criteria will have the specific context filter applied. This means that if any of the multiple search criteria supplied has a 'Master Patients Only' filter, then all child patients will be filtered out of the search (I.e., current patient list context takes precedence).

For example, a search on Surname and GP practice will invoke a search on master patient only because the GP practice is associated with the current patient list context.

## Find Result Patient Search logic

Similar rules will apply to the "Find Result" search function

Search master records only (Current patient list context)

Search criteria that relates back to the patient:

- GP
- GP Practice
- Ward
- Consultant
- Hospital

These criteria will be applied against the master patient only. If a match is found then all results relating to this patient will be displayed.

The patient details displayed for the search results returned will always be for the master patient.

## **Find Document Patient Search logic**

Search criteria that relate back to the patient:

- Surname
- Forename
- Date of Birth
- Identifier

These criteria will be applied against all patients. If a match is found then all documents relating to this patient will be displayed.

#### Applying patient context to web application views

#### Recently viewed patients list

Current patient context will be applied to the recently viewed lists on the home page. This means that the master patient details will always be shown on the "recently viewed" tabs for patients, documents and results on the home page.

#### Patient details in audit reports

Current patient context will be applied to patient details shown in Audit Reports. Where patient details are listed in a user or system audit report, the master patient details will always be shown.

Return to Index

## 3.6 Recently requested results

#### Background

The Recently Requested Result functionality allows users to view new and updated results that were requested by one of a user-defined list of clinicians (a "Requestor Group") via a list on the users' homepage.

This will provide the user with a list of lab results that they, or related clinicians, have recently requested. Each result in this list will be complimented with "Viewed By" indicators to quickly show if the most recent version of the result has been viewed by the current user, or viewed by any other user in the system.

#### Setup

To allow a user to configure Requestor Groups and view the Recently Requested Results Home Page tab they must be assigned the Recently Requested Results module permission. This is found under the Results category.

| SCI Store Pa  | isley               |                              |               |              |                             |         | My Settings | About Store    | Log Out    |
|---|---------------------|------------------------------|---------------|--------------|-----------------------------|---------|-------------|----------------|------------|
| Home Find Patient   | Find Result Fir     | nd Document Find o           | on CHI Find T | reatment Log |                             |         | Patie       | ent ID:        | Go         |
|   | Configuration       | Exceptions Mgmt              | Security      | Maintenance  | Reporting                   | General | Notificatio | ns             |            |
| Home > Users > Add Use  | r to Group > Edit M | odule Permission             |               |              |                             |         |             | User: admin (  | on PJSSCI6 |
| ¢=   📮  |                     |                              |               |              |                             |         |             |                |            |
| User  |                     |                              |               |              |                             |         |             |                |            |
| User Name   | Fri                 | iendly Name                  | User          | Туре         | Base Lo                     | cation  |             | Account Status | 5          |
| admin   | The                 | e Global Admin               | Lo            | cal          | Local S                     | Store   |             | Active         |            |
| Edit Module Permissie<br>Select Category<br>Category Results<br>Find Result Search<br>View Results<br>View Results History<br>View and Add Result<br>Cumulative Report<br>Cumulative Report P<br>Recently Requested | Notes Results       | ply Template<br>plate (None) | Υ Αρργ        | Combine Per  | rmissions<br>ned Permission | s       |             |                |            |

The user is then able to configure Requestor Groups.

#### **Requestor Groups**

The Requestor Groups setup page is accessed via a new link on the My Settings page:



The User Requestor Groups page displays a list of Requestor Groups configured by the current user. From here you are able to add a new requestor group, delete and existing group, or click through to edit a group and add clinicians to the group.

| SCI      | Store Pa       | aisley              |            |             |          |               |           |         | My Settings  | About Store | Log Out    |
|----------|----------------|---------------------|------------|-------------|----------|---------------|-----------|---------|--------------|-------------|------------|
| Home     | Find Patient   | Find Result Fin     | d Document | Find on Cl  | II Find  | Treatment Log |           |         | Patie        | nt ID:      | Go         |
|          |                | Configuration       | Exceptions | Mgmt :      | Security | Maintenance   | Reporting | General | Notification | s           |            |
| lome > M | y Settings > U | ser Requestor Group | s          |             |          |               |           |         |              | User: admin | on PJSSCI6 |
| > +      |                |                     |            |             |          |               |           |         |              |             |            |
|          |                |                     |            |             |          |               |           |         |              |             |            |
| Request  | or Groups Lis  | st                  |            |             |          |               |           |         |              |             |            |
| _        |                |                     |            |             |          |               | _         |         |              |             |            |
| 2 Record | ds Returned    |                     |            |             |          |               |           |         |              |             |            |
| Gr       | oup Name       | Group Type          |            | Date Upd    | ated     | Delete        |           |         |              |             |            |
| Me-1     |                | Personal            | 12         | 2/11/2009 1 | 4:03:50  | Delete        |           |         |              |             |            |
| clinic   |                | Clinic              | 12         | 2/11/2009 1 | 4:06:23  | Delete        |           |         |              |             |            |

#### Adding a new Requestor Group

Clicking the **t** button allows a user to create a new Requestor Group by navigating to the Add Requestor Group page shown below. On this page the user is asked to enter a group Name and Type. The group name is free text. The type can be one of the following categories:

- Personal
- Other Clinician
- Clinic

• Other Group

The Personal category should be used to hold the HCPs that represent the user. E.g. if the user is Ellen Hoida then the user would add all instances of Ellen Hoida in the HCP table into this group. A user will only be able to configure 1 personal group.

| SC SC     | I Store Pa             | aisley            |                 |             |         |               |           |         | My Settings | About Store | Log Out    |
|-----------|------------------------|-------------------|-----------------|-------------|---------|---------------|-----------|---------|-------------|-------------|------------|
| Home      | Find Patient           | Find Result       | Find Document   | Find on CH  | I Find  | Treatment Log |           |         | Pati        | ent ID:     | Go         |
|           |                        | Configuration     | Exception       | s Mgmt S    | ecurity | Maintenance   | Reporting | General | Notificatio | ns          |            |
| Home > I  | My Settings > U        | ser Requestor Gro | pups > Add Requ | estor Group |         |               |           |         |             | User: admin | on PJSSCI6 |
| <b>\$</b> |                        |                   |                 |             |         |               |           |         |             |             |            |
|           |                        |                   |                 |             |         |               |           |         |             |             |            |
| Reques    | stor Group             |                   |                 |             |         |               |           |         |             |             |            |
| Group N   | Name My Group          | Save              | 9               |             |         |               |           |         |             |             |            |
| Group T   | Type Please Sele       | ect 💙             |                 |             |         |               |           |         |             |             |            |
|           | Personal               |                   |                 |             |         |               |           |         |             |             |            |
|           | Other Clinic<br>Clinic | ian               |                 |             |         |               |           |         |             |             |            |
|           | Other Group            | p                 |                 |             |         |               |           |         |             |             |            |

## Deleting a Group

Once a group has been added a user is able to delete it from the list by clicking on the Delete link in the relevant table row. They will be asked to confirm the deletion.

| Home       Find Patient       Find Result       Find Document       Find on CHI       Find Treatment Log         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Not         Not         Image: Security       Maintenance       Reporting       General       Not         Security       Maintenance       Reporting       General       Not         Image: | Patient ID: G<br>fications<br>User: admin on PJSSCI |
|---|---|
| Configuration Exceptions Mgmt Security Maintenance Reporting General Not<br>ome > My Settings > User Requestor Groups<br>>   +<br>Requestor Groups List   | fications<br>User: admin on PJSSCI                  |
| a +   | User: admin on PJSSCI                               |
| a   + Requestor Groups List   |   |
| Requestor Groups List   |   |
| Requestor Groups List   |   |
|   |   |
|   |   |
| 2 Records Returned  |   |
| Group Name Group Type Date Updated Delete   |   |
| Me-1 Personal 12/11/2009 14:03:50 Delete  |   |
| clinic Clinic 12/11/2009 14:06:23 Delete  |   |

Users will only be able to delete a group if there are no HCPs attached to the group.

### Adding HCPs/Clinicians to a group

By clicking a Requestor Group on the User Requestor Groups page the user is taken through to the Edit Requestor Group page. Here they are able to Change the Group Name and Type and also add HCPs/Clinicians to the group.

| SC SC    | I Store Pa      | aisley              |                        |            |               |           |         | My Settings  | About Store   | Log Out    |
|----------|-----------------|---------------------|------------------------|------------|---------------|-----------|---------|--------------|---------------|------------|
| Home     | Find Patient    | Find Result Fin     | d Document Find on     | CHI Find 1 | Freatment Log |           |         | Patie        | nt ID:        | Go         |
|          |                 | Configuration       | Exceptions Mgmt        | Security   | Maintenance   | Reporting | General | Notification | IS            |            |
| Home > I | My Settings > U | ser Requestor Group | s > Edit Requestor Gro | up         |               |           |         |              | User: admin ( | on PJSSCI6 |
| 4        |                 |                     |                        |            |               |           |         |              |               |            |
|          |                 |                     |                        |            |               |           |         |              |               |            |
| Curren   | t Requestor G   | roup                |                        |            |               |           |         |              |               |            |
| Group N  | lame Me-1       | Save                |                        |            |               |           |         |              |               |            |
| Group T  | ype Personal    | ~                   |                        |            |               |           |         |              |               |            |
| Reques   | stor Group HC   | Ps                  |                        |            |               |           |         |              |               |            |
| Select I | HCPs            | -                   |                        |            |               |           |         |              |               |            |
| 3 Recor  | ds Returned     |                     |                        |            |               |           |         |              |               |            |
|          |                 |                     |                        |            |               |           |         |              |               |            |
|          | N               | ame                 | GM                     | IC Code    |               | Pos       | sition  |              | Dele          | te         |
| AARON    | , DAVID         |                     | 1                      | 208108     |               | Con       | Suitant |              | Delet         | te         |
| HOIDA    | FLIEN           |                     | 4                      | 304698     |               | Senior    | GP      |              | Delet         | te l       |
| HOIDA,   | ELLEN           |                     | 4                      | 304698     |               |           | GP      |              | Delet         | te         |

To add a clinician the user should click the "Select HCPs" button. This will then display a popup control that allows them to search for and select HCPs/Clinicians to add to the group.

The user will be presented with a textbox to add a clinician's name. This uses a "contains" search so a partial surname can be entered. The results grid is sort-able and has paging. Users can select the desired clinician by clicking the Select link on the relevant row of the grid.

A message will be displayed at the top of the control if the clinician has been successfully added. The user will also be able to see the clinician added to the list in the background.

| $s_T$ SCI Store Paisley                      |                            |          |        |           |             | Log Out    |
|--|----------------------------|----------|--------|-----------|-------------|------------|
| Home Find Patient Find Result Find D         |                            |          |        |           | ent ID:     | Go         |
| Configuration E                              |                            |          |        |           |             |            |
| Home > My Settings > User Requestor Groups > | Edit Requestor Group       |          |        |           | User: admin | on PJSSCI6 |
| <b>\</b>                                     |                            |          |        |           |             |            |
|  |                            |          |        |           |             |            |
| Current Requestor Group                      | Select HCPs                |          | ×      |           |             |            |
| Group Name Me-1 Save                         | O HCP sucessfully added to | group    |        |           |             |            |
| Group Type Personal                          | Clinican Name johnston     | Search   |        |           |             |            |
|  | 12345678                   |          |        |           |             |            |
| Requestor Group HCPs                         | Name                       | GMC Code |        |           |             |            |
|  | FERGUSON, JOHNSTON         | 1705069  | Select |           |             |            |
| Select HCPs                                  | JOHNSTON, ADRIAN           | 4710497  | Select |           |             |            |
| 1 Record Returned                            | JOHNSTON, ALISTAIR         | D053176  | Select |           |             |            |
|  | JOHNSTON, ANDREW           | 1332106  | Select |           |             |            |
| Name   | JOHNSTON, ANN              | 2849467  | Select | osition   | Dele        | te         |
| JOHNSTON, ANDREW                             | JOHNSTON, BRENDA           | D058708  | Select | posultant | Delet       | te         |
|  | JOHNSTON, BRIAN            | 1330221  | Select |           |             |            |
|  | JOHNSTON, BRYAN            | 2546427  | Select |           |             |            |
|  | JOHNSTON, CAROL            | 2555650  | Select |           |             |            |
|  | JOHNSTON, CHRISTOPHER      | 0400590  | Select |           |             |            |
|  | 12345678                   |          |        |           |             |            |
|  |                            |          |        |           |             |            |
|  |                            |          |        |           |             |            |

To delete a clinician from the Requestor Group they simply click the Delete link on the relevant row. The user will be prompted to confirm the deletion.

| Sc: SC     | I Store Pa      | aisley          |                   |             |             |                      |                 |                | My Settings  | About Store | Log Out   |
|------------|-----------------|-----------------|-------------------|-------------|-------------|----------------------|-----------------|----------------|--------------|-------------|-----------|
| Home       | Find Patient    | Find Result     | Find Document     | Find on CHI | Find T      | reatment Log         |                 |                | Patie        | nt ID:      | Go        |
|            |                 | Configuratio    | n Exception       | s Mgmt 🛛 S  | ecurity     | Maintenance          | Reporting       | General        | Notification | 5           |           |
| Home > N   | My Settings > U | ser Requestor G | roups > Edit Requ | estor Group |             |                      |                 |                |              | User: admin | on PJSSCI |
| 🛈 Repo     | rt Profile succ | essfully delete | ed                |             |             |                      |                 |                |              |             |           |
| <b>(</b> 2 |                 |                 |                   |             |             |                      |                 |                |              |             |           |
|            |                 |                 |                   |             |             |                      |                 |                |              |             |           |
| Current    | t Requestor G   | roup            |                   |             |             |                      |                 |                |              |             |           |
| Crown N    | Inmo Mo 1       | Sa              |                   |             |             |                      |                 |                |              |             |           |
| Group N    | ante me-i       | 34              |                   |             |             |                      |                 |                |              |             |           |
| Group T    | ype Personal    | *               |                   |             |             |                      |                 |                |              |             |           |
|            |                 |                 |                   |             |             |                      |                 |                |              |             |           |
| Reques     | tor Group HCF   | °5              |                   |             |             |                      |                 |                |              |             |           |
| Select H   | HCPs            |                 |                   | Windows     | s Internet  | Explorer             |                 |                | X            |             |           |
| 2 Recor    | ds Returned     |                 |                   |             |             |                      |                 |                |              |             |           |
|            |                 |                 |                   | _ ?         | Are you sur | e you want to delete | HOIDA, ELLEN fr | rom the reque: | stor group?  |             |           |
|            | Na              | me              |                   |             |             |                      |                 |                |              | Dele        | te        |
| Holda, t   | ELLEN           |                 |                   | _           |             |                      | Cancel          |                |              | Delet       | te        |
| HOIDA,     |                 |                 |                   |             |             |                      | Cancer          |                |              | Delei       |           |

#### **Viewing Recently Requested Results**

The Recently Requested Results can be viewed on the Recently Requested Results tab on the users Home page. This tab contains a filter on Requestor Group and 'Date From' &' Date To'.

On accessing the tab the Requestor Group will default to the Personal group type, the 'Date To' will default to today's date and the 'Date From' will default to today – 7 days. A search is then run automatically using these values. A user can alter these values and re-run the search. The results of the search will be displayed in a grid. The grid is again sort-able and has paging.

The results grid contains two viewed by indicators – "Viewed by Me" and "Other User". These indicate whether the <u>most recent version</u> of the result has been viewed by the current user or any other user respectively. I.e. if a user has viewed a result the Viewed by Me column would contain a "Y" for yes. If the result was then updated this value would change to "N".

| Transferre  | Paisley            |                            |                  |                  | P       | My Settings   | About Store | Log Out    |
|---|--------------------|----------------------------|------------------|------------------|---------|---------------|-------------|------------|
| Home Find Patier  | t Find Result Fi   | nd Document Find on (      | CHI Find Treatme | nt Log           |         | Patient       | ID:         | Go         |
|   | Configuration      | Exceptions Mgmt            | Security Maint   | enance Reporting | General | Notifications |             |            |
| lome  |                    |                            |                  |                  |         |               | User: admin | on PJSSCI6 |
| Recently Viewed Ri<br>Results<br>Result Filter<br>Requestor Group | Me-1 V Date From 0 | ly Requested My Favourites | Administration   |                  |         |               |             |            |
| 4 Records Returne   | d                  |                            |                  |                  |         |               |             |            |
| Name  | CHI                | Investigation              | Requested By     | / Processe       | d At    | Viewed by     | Me Otl      | ier User   |
| Dave Edwards  | 0504567713         | FBC                        | AARON, DAVID     | 06/11/2009 1     | 1:24:09 | Y             |             | Y          |
| Dave Edwards  | 0504567713         | Lipids                     | AARON, DAVID     | 06/11/2009 1     | 1:24:09 | Y             |             | Y          |
| Dave Edwards  | 0504567713         | BLOOD FILM                 | AARON, DAVID     | 06/11/2009 1     | 1:24:09 | Y             |             | Y          |
| Dave Edwards  | 0504567713         | BLOOD CULTURE              | AARON, DAVID     | 06/11/2009 1     | 1:24:09 | Y             |             | Y          |

Clicking the "Other User" link in each row will show a popup displaying audit information for the relevant result.

| SCI Store          | Paisley         |                          |                             |                             |                         |                                   | My Setting | ıs About    | Store    | Log Out |
|--------------------|-----------------|--------------------------|-----------------------------|-----------------------------|-------------------------|-----------------------------------|------------|-------------|----------|---------|
| Home Find Patien   |                 |                          |                             |                             |                         |                                   |            | Patient ID: |          | Go      |
|                    |                 | ration Exc               | eptions Mamt                |                             |                         | orting General                    |            |             |          |         |
| Home               |                 |                          |                             |                             |                         |                                   |            | User:       | admin on | PJSSCI6 |
|                    |                 |                          |                             |                             |                         |                                   |            |             |          |         |
| Recently Viewed Re | ecently Created | Recently Reque           | sted My Favourites          | Administration              |                         |                                   |            |             |          |         |
| Results            |                 | Audit informa            | ation for Lipids            |                             |                         |                                   | ×          |             |          |         |
|                    |                 | - Result Set I           | nformation                  |                             |                         |                                   |            |             |          |         |
| Requestor Group    | Me-1 🔽 Dai      | Patient Na<br>Dave Edwar | me Report Io<br>rds H03,080 | <b>dentifier</b><br>58012.G | Investigation<br>Lipids | Date Processe<br>06/11/2009 11:24 | d<br>:09   |             |          |         |
| 4 Records Returned | đ               | 122456790                | 10                          |                             |                         |                                   |            |             |          |         |
| Name               | C               | 123430703                |                             |                             |                         | _                                 | _          | d by Me     | Other    | User    |
| Dave Edwards       | 0504            | Username                 | Name<br>The Olehal Admin    | System                      | Location                | Lime                              | 50.56      | Y           | Y        |         |
| Dave Edwards       | 0504            | admin                    | The Global Admin            | PJSSCI6                     | SCI Store Paisley       | 12/11/2009 14:                    | 52:56      | Y           | Y        |         |
| Dave Edwards       | 0504            | admin                    | The Global Admin            | PJSSCI6                     | SCI Store Paisley       | 12/11/2009 14:                    | 31:16      | Y           | Y        |         |
| Dave Edwards       | 0504            | admin                    | The Global Admin            | PISSCIE                     | SCI Store Paisley       | 12/11/2009 14:                    | 27:42      | Y           |          |         |
|                    |                 | admin                    | The Global Admin            | PISSCIE                     | SCI Store Paisley       | 11/11/2009 16:                    | 07:14      |             |          |         |
|                    |                 | admin                    | The Global Admin            | PISSCIE                     | SCI Store Paisley       | 11/11/2009 16:                    | 05:27      |             |          |         |
|                    |                 | admin                    | The Global Admin            | PISSCIE                     | SCI Store Paisley       | 11/11/2009 18:                    | 10:22      |             |          |         |
|                    |                 | admin                    | The Global Admin            | PISSOIG                     | SCI Store Paisley       | 11/11/2009 15:                    | 10.11      |             |          |         |
|                    |                 | admin                    | The Global Admin            | PISSOIG                     | SCI Store Paisley       | 11/11/2009 15:                    | 38-01      |             |          |         |
|                    |                 | admin                    | The Global Admin            | PISSCIE                     | SCI Store Paisley       | 11/11/2009 15:                    | 24.32      |             |          |         |
|                    |                 | 123456780                | 10                          |                             | e et etore rubiey       | 11, 12, 2009 101                  |            |             |          |         |
|                    |                 | 142420/02                | 10                          |                             |                         |                                   |            |             |          |         |
|                    |                 |                          |                             |                             |                         |                                   |            |             |          |         |
|                    |                 |                          |                             |                             |                         |                                   |            |             |          |         |

## Security Model

The security model is applied to the results displayed on the Recently Requested Results tab in a similar way to the Find Results page.

Patient consent is respected and any results belonging to patients who have withdrawn consent will not be shown, unless the user has broken glass against that patient. View permissions will be applied as will field permissions.

Field permissions and row restrictions will work on the following fields:

| Patient Master | PatientID, GivenName, FamilyName, Sex,<br>DateOfBirth, CHI, GP, GPPractice, Consultant,<br>Ward, Hospital, ServiceID, MergeID, Consent,<br>MasterMergeID, Anonymous.  |
|----------------|---|
| Test Report    | TestReportID, ReportType, ReportIdentifier,<br>RequestingParty_HealthcareProfessionalID,<br>Recipient, RecipientOrganisation,<br>RequestingOrg, ReportAbnormal, SectionName,<br>SystemType, DocumentType,<br>DocumentSubType, eventtime |
| Sample         | SampleID, TypeCode, TypeDescription,<br>AnatomicalCode, AnatomicalDescription,  |
| Test           | TestID, SetOrder, SetCode, setDescription,<br>ReadCode, ReadDescription, AuthorHCPID,<br>AuthorisedByHCPID, ExaminedByHCPID,  |

| ScribeHCPID, TestStatusType |
|-----------------------------|
|-----------------------------|

#### Results display system setting

Results shown on the recently requested tab are always grouped by result set. This differs from other home page tabs that will be grouped based on the "ResultDisplay" system setting.

**Return to Index** 

## 3.7 Treatment Log NS subscriptions

#### Background

A treatment log contains summary information of treatment requests through to completion or cancellation. It is targeted as being a national dataset for use across all health boards.

In addition to the treatment log file interface developed for SCI Store version 6.0, changes have been made to the notifications services (NS) subscriptions manager feature to enable an administrator to create treatment log NS subscriptions for Web Service users.

This feature summary will focus on the web application changes to the NS subscription manager only.

## **Feature Summary**

#### System Settings

The following system setting must be set to "true" to enable the use of Treatment Log NS subscriptions.

| System setting               | Value | Description   |
|------------------------------|-------|---|
| AllowSubscribers             | True  | Allows subscribers to notification services   |
| NSGenerateTreatmentLogEvents | True  | This setting controls whether or not to<br>create Treatment Log Notification<br>Services events when processing a<br>Treatment Log file |

## Managing Treatment log notification services subscriptions

Treatment log NS subscriptions are managed by the administrator user within the SCI Store Web Application. The functionality can be accessed from the NS subscriptions manager screen

Note: The treatment log notifications are integrated with the SCI Store Windows Service and can only be configured in the SCI Store administrator Web application. To view the Notification Services Subscriptions Manager screen:

- Select "Notifications" form the main menu
- Select "NS Subscription manager" from the Sub-menu
- (The NS Subscriptions Manager page is displayed Fig 1.)

| SC SC    | I Store Pa      | isley       |                    |                 |          |             |           |         | My Setting    | gs About S  | tore Log O    |
|----------|-----------------|-------------|--------------------|-----------------|----------|-------------|-----------|---------|---------------|-------------|---------------|
| Home     | Find Patient    | Find Result | Find Document      | Find on CHI     |          |             |           |         |               | Patient ID: |               |
|          |                 | Co          | nfiguration        | Exceptions Mgmt | Security | Maintenance | Reporting | General | Notifications |             |               |
| Home > I | NS Subscription | Manager     |                    |                 |          |             |           |         |               | User: a     | dmin on PJSS( |
|          |                 |             |                    |                 |          |             |           |         |               |             |               |
| -        |                 |             |                    |                 |          |             |           |         |               |             |               |
| Search   | User Subscrip   | otions      |                    |                 |          |             |           |         |               |             |               |
| User *   | Please Select   | Subscr      | iption Type * Plea | ise Select      | Search   |             |           |         |               |             |               |
|          |                 |             |                    |                 |          |             |           |         |               |             |               |

Fig. 1: NS Subscription Manager Screen

To Search User Subscriptions from the NS Subscriptions manager screen:

- Select a user from the dropdown box (This is populated with valid Web Service users only)
- Select "Treatment log subscriptions" from the dropdown menu
- Click "Search"

Search result options:

- If user has valid treatment log subscriptions: The system will display a list of treatment log subscriptions for the specified user (See Fig. 2).; else
- If user does not have any treatment log subscriptions: The system will display the error message: "Cannot return treatment log subscriptions. The user is not a subscriber".

After the search has been attempted an "Add" button is visible on the toolbar. This will allow a new Treatment Log subscription to be created for the selected user (See Fig. 2).



Fig. 2: Error Message and "Add" subscription button on toolbar.

[Note: This search function can be used to view patient and result subscriptions. However, only treatment log subscriptions can be edited here.]

To navigate to the Add / Amend subscriptions for a specified user:

- In the "Search user subscriptions" form, ensure that the required user is selected and that the subscription type is set to "Treatment log subscriptions".
- Select the "Add" button
- The "Add / Amend subscription" form is displayed (See, Fig 3.)

[Note: The add button will not be visible unless the "Treatment log subscriptions" type is selected.]

| <sup>କ୍</sup> ୟୁ SC | CI Store Pa     | isley        |  |   |             |              |           |         | My Settings   | About Store | Log Out    |
|---------------------|-----------------|--------------|--|---|-------------|--------------|-----------|---------|---------------|-------------|------------|
| Home                | Find Patient    | Find Result  | Find Documen   | t Find on CHI   |             |              |           |         | Pat           | ient ID:    | Go         |
|                     |                 | C            | onfiguration   | Exceptions Mgmt   | Security    | Maintenance  | Reporting | General | Notifications |             |            |
| Home >              | NS Subscription | Manager > Ad | ld/Amend Treatm  | ent Log Subscription  |             |              |           |         |               | User: admin | on PJSSCI6 |
| ¢                   |                 |              |  |   |             |              |           |         |               |             |            |
| ⊂ User              | Info            |              |  |   |             |              |           |         |               |             |            |
|                     | Usernan         | ne           |  | Friend  | y Name      |              | En        | nail    | Base          | Location    |            |
|                     | WebServ         | ice          |  | WebServio   | e test user |              | N         | /A      | Loc           | al Store    |            |
|                     |                 |              |  |   |             |              |           |         |               |             |            |
| Add/A               | mend Subscrip   | tion         |  |   |             |              |           |         |               |             |            |
| Site                |                 | Search Spe   | cialty   |   | 1           | Patient Type | ~         |         |               |             |            |
|                     |                 |              | A1 - General<br>A1 - General<br>A2 - Cardiolo<br>A3 - Clinical<br>A5 - Clinical<br>A6 - Infectio.<br>A7 - Dermato<br>A8 - Endocri<br>A8 - Endocri<br>A9 - Gastro-<br>A9 - Gastro-<br>A1 - Palicital<br>A7 - Paenalat<br>A4 - Neurolo<br>A4 - Paenalat<br>A9 - Renall<br>A9 - Respira<br>A7 - Medical<br>AV - Clinical<br>AV - Clinical | Medicine<br>gy<br>Tric Carology<br>Jenetics<br>Interactional Systems<br>logy<br>ology & Dibestes<br>inology<br>ology & Dibetes<br>inology<br>there<br>interology<br>there<br>there<br>interology<br>there<br>interology<br>there<br>the<br>Medicine<br>ath Medicine<br>ath Medicine<br>ath Medicine<br>ath Medicine<br>ath Medicine<br>to y Medicine<br>to | tics        | ×            |           |         |               |             |            |

Fig 3: Add / Amend treatment log subscription form

## Setting up the Treatment log subscription parameters

The subscription is configured using one or more of the following parameters:

| Item         | Description  |
|--------------|--|
| Site         | (E.g., hospital or GP practice)  |
|              | Type in a keyword in the field and click<br>"Search" to display a list box of possible<br>matches (See figure 4). Select an item from<br>the list and click OK. The selected value will<br>be added to the site field. |
| Specialty    | (E.g. Cardiology or, General Medicine)   |
|              | Select from dropdown list.   |
| Patient Type | (Inpatient, Outpatient, or Daycase)  |

Select from dropdown list.

Note: Having created a Treatment log NS subscription, an entry will be placed in the SCI Store notification messages table each time a treatment log file in processed that meets the subscription criteria. This message will contain a treatment log ID.

The treatment log ID can be obtained by using the "Get notification" Web Service request.

The detail of the treatment log can obtained by passing the treatment log ID via the "Get treatment log" web service request.

[Note: If multiple parameters are specified, a treatment log notification can only be generated if a treatment log record matches on all parameters].

Having specified the subscription parameters, click the "Save" button on the toolbar.

| Pr SCI Store Pai          |                   |            |   |   |  |  |                     |               |               |               | Jut |
|---------------------------|-------------------|------------|---|---|--|--|---------------------|---------------|---------------|---------------|-----|
|                           |                   |            |   |   |  |  |                     |               | Patient ID:   |               | Go  |
|                           | Configur          | ration     | Exceptions Mgmt   | Security  | Maintenance  | Reporting  | General             | Notifications |               |               |     |
| Home > NS Subscription Ma | anager > Add/Amer | nd Treatme | nt Log Subscription   |   |  |  |                     |               | User: a       | idmin on PJSS | CI6 |
| æ   🛃                     |                   |            |   |   |  |  |                     |               |               |               |     |
|                           |                   |            |   |   |  |  |                     |               |               |               |     |
| Username                  | 1                 |            | Friendly  | y Name  |  | Em   | ail                 | E             | Base Location |               |     |
| webservice                |                   |            | webServio   | e test user   |  | IN,  | A                   |               | Local Store   |               |     |
| Add/Amend Subscripti      | on                |            |   |   |  |  |                     |               |               |               |     |
| Site uist                 | Search Specialty  |            |   |   | Patient Type   | ~  |                     |               |               |               |     |
|                           |                   |            |   |   |  |  |                     |               |               |               |     |
|                           |                   |            | _   |   |  |  | _                   |               |               |               |     |
|                           |                   |            | Location Search F   | Results   |  |  | Close               |               |               |               |     |
|                           |                   |            | (90115) NORTH U<br>(90134) SOUTH U<br>(W003B) South U<br>(W108H) Uist & B<br>(90168) UIST AND | IST MEDICAL PF<br>IST MEDICAL PF<br>IST Medical Pract<br>arra Hospital - B<br>D BARRA HOSPI | ACTICE - THE SURGE<br>ACTICE - DALIBURGH<br>ice - Daliburgh Lochba<br>alivanich Isle of Benber<br>TAL - ISLE OF BENBER | RY LOCHMADDY<br>ISLE OF SOUTH I<br>isdale Isle of Sout<br>cula<br>CULA | ISLE<br>JIST<br>h U |               |               |               |     |
|                           |                   |            |   |   |  |  |                     |               |               |               |     |

Fig 4: Location search results for Site

The treatment log subscriptions grid view shows all details of subscriptions for a particular web service user. From here an administrator user can:

- Select an item to edit the subscription parameters
- Delete a subscription using the "Delete" link in the last column of the grid (See Fig 6.)

| SC SC    | I Store Pa      | isley        |                   |                          |          |             |           |              | My Set        | tings About S | tore Log Out   |
|----------|-----------------|--------------|-------------------|--------------------------|----------|-------------|-----------|--------------|---------------|---------------|----------------|
| Home     | Find Patient    | Find Result  | Find Document     | Find on CHI              |          |             |           |              |               | Patient ID:   | Go             |
|          |                 | Co           | nfiguration       | Exceptions Mgmt          | Security | Maintenance | Reporting | General      | Notifications |               |                |
| Home > I | NS Subscription | Manager      |                   |                          |          |             |           |              |               | User: a       | dmin on PJSSCI |
| 🛈 Subs   | cription saved  | successfully |                   |                          |          |             |           |              |               |               |                |
|          |                 |              |                   |                          |          |             |           |              |               |               |                |
|          |                 |              |                   |                          |          |             |           |              |               |               |                |
| Search   | User Subscrip   | tions        |                   |                          |          |             |           |              |               |               |                |
| User *   | WebService      | Y Subscri    | ption Type * Trea | atment Log Subscriptions | Search   |             |           |              |               |               |                |
| Treatm   | ent Log Subsc   | riptions     |                   |                          |          |             |           |              |               |               |                |
| 3 Recor  | ds Returned     |              |                   |                          |          |             |           |              |               |               |                |
|          | Sit             | e            |                   | Specialty                | Patie    | ent Type    | Las       | t Updated    |               | Updated By    | Delete         |
|          | Glasgow Roya    | al Infirmary |                   |                          |          |             | 09/09/3   | 2009 11:36:5 | 1             | admin         | Delete         |
|          |                 |              | G                 | eneral Medicine          | In       | patient     | 09/09/3   | 2009 11:36:2 | 5             | admin         | Delete         |
|          |                 |              |                   |                          | Ou       | patient     | 09/09/3   | 2009 11:35:5 | 3             | admin         | Delete         |

Fig 6: Treatment Log Subscriptions list

## Notification message Audit search

Use the NS message audit (Fig 7) function to search for notification message audit records.

Functions on this form:

| Item                          | Description   |
|-------------------------------|---|
| User (Input)                  | Input the web service user that you want to find message audit information for.   |
| Message Status (Combo<br>box) | Options:<br>Outstanding – message has not been<br>consumed via web service.<br>Consumed - message has been consumed<br>via Web Service.   |
| Period start                  | This date field only appears if "Consumed" is<br>selected as message status and is used in<br>conjunction with the "to" date field to<br>constrain the scope of the search.<br>Default value is "today minus 1 month"<br>(See fig. 8) |
| Period end                    | This date field only appears if "Consumed" is<br>selected as message status and is used in<br>conjunction with the "From" date field to<br>constrain the scope of the search.<br>Default value is "today"<br>(See fig. 8)             |
| Search (Button)               | Invokes the search for audit records of notification messages.  |

| SC:  | I Store Pa     | isley       |                |            |             |           | My Settings | About Store   | Log Out    |
|--|----------------|-------------|----------------|------------|-------------|-----------|-------------|---------------|------------|
| Home   | Find Patient   | Find Result | Find Document  | Find on CH | I           |           | Pa          | tient ID:     | Go         |
|  | Configu        | iration E   | xceptions Mgmt | Security   | Maintenance | Reporting | General     | Notifications |            |
| Home > N   | NS Message Aud | it          |                |            |             |           |             | User: admin   | on PJSSCI6 |
| ~  |                |             |                |            |             |           |             |               |            |
| 14-11<br>14-11   |                |             |                |            |             |           |             |               |            |
| Notifica   | ation Message  | Audit       |                |            |             |           |             |               |            |
| User * Message Status * Please Select V<br>Please Select<br>Search Outstanding<br>Consumed |                |             |                |            |             |           |             |               |            |

Fig 7: Notification Message Audit search options

| Sc Sc    | I Store Pa     | isley       |                  |                   |                 |               |                 |         | My Setti      | ngs About   | Store Log Out    |
|----------|----------------|-------------|------------------|-------------------|-----------------|---------------|-----------------|---------|---------------|-------------|------------------|
| Home     | Find Patient   | Find Result | Find Docume      | nt Find on CHI    |                 |               |                 |         |               | Patient ID: | Go               |
|          |                | Co          | onfiguration     | Exceptions Mgmt   | Security        | Maintenance   | Reporting       | General | Notifications |             |                  |
| Home >   | NS Message Aud | lit         |                  |                   |                 |               |                 |         |               | User:       | admin on PJSSCI6 |
| <b>\</b> |                |             |                  |                   |                 |               |                 |         |               |             |                  |
|          |                |             |                  |                   |                 |               |                 |         |               |             |                  |
| Notific  | ation Message  | Audit       |                  |                   |                 |               |                 |         |               |             |                  |
| User *   | webservice     | Message     | e Status * Consu | imed 💌 Period Sta | art * 09/08/200 | 9 👻 Period Er | nd * 09/09/2009 | *       |               |             |                  |
| Search   |                |             |                  |                   |                 |               |                 |         |               |             |                  |

Fig 8: Notification Message Audit search options with period start and period end

Date options are displayed if "consumed" is selected as Message status (Fig 8 Above).

## Notification message Audit search results list

Grid view of the NS message audit search results (Fig. 9)

| St SC   | I Store Pa  | aisley      |              |                 |          |             |           |         | My Settir         | igs About Sto |
|---------|---|-------------|--------------|-----------------|----------|-------------|-----------|---------|-------------------|---------------|
| Home    | Find Patient  | Find Result | Find Docume  | nt Find on CHI  |          |             |           |         |                   | Patient ID:   |
|         |   | Co          | onfiguration | Exceptions Mgmt | Security | Maintenance | Reporting | General | Notifications     |               |
| Home >  | NS Message Au   | dit         |              |                 |          |             |           |         |                   | User: adr     |
| 4       |   |             |              |                 |          |             |           |         |                   |               |
|         |   |             |              |                 |          |             |           |         |                   |               |
| Notific | ation Message   | e Audit     |              |                 |          |             |           |         |                   |               |
| User *  | User * Webservice Message Status * Consumed V Period Start * 09/08/2009 V Period End * 09/09/2009 V |             |              |                 |          |             |           |         |                   |               |
| Search  |   |             |              |                 |          |             |           |         |                   |               |
| Notific | ation Message   | :5          |              |                 |          |             |           |         |                   |               |
| 1 Reco  | rd Returned   |             |              |                 |          |             |           |         |                   |               |
|         | Use   | rname       |              | Even            | t Type   |             |           |         | Date Created      |               |
|         | WebS  | Service     |              | Treatr          | mentLog  |             |           |         | 09/09/2009 11:41: | 17            |
|         |   |             |              |                 |          |             |           |         |                   |               |

Fig 9: NS Message Audit Search results Grid

Search results grids data:

| Item         | Description                            |
|--------------|--|
| User name    | Web service user name.                 |
| Event type   | E.g. patient, result or Treatment log. |
| Date created | The date the message was created.      |

### **Additional Information**

Managing the impact of a subscription parameter change (e.g. "patient type") in the source system

A web service user has one NS subscription to receive notifications of all outpatient treatment logs only. A particular treatment log for a patient is changed (in the source system) from outpatient to inpatient. The web service user would receive a notification for the first inpatient notification only; they would then have to set up an inpatient subscription to continue to receive further notifications for that particular patient.

### Define source system

The administrator user can define a "Source System" when adding or amending a User. If this source system matches the source system defined in the treatment log file then the user will not receive notifications for that treatment log file.

| ş  | SC     | I Store     | Paisley        |                   |             |              |           | My S       | ettings   | About Store    | Log Out |
|----|--------|-------------|----------------|-------------------|-------------|--------------|-----------|------------|-----------|----------------|---------|
| н  | ome    | Find Patien | nt Find Result | Find Document Fin | nd on CHI   |              |           |            | Patient   | ID:            | Go      |
|    |        |             | Configuration  | Exceptions Mgmt   | Security    | Maintenance  | Reporting | General    | Notificat | ions           |         |
| Но | me > l | Jsers > Add | User to Group  |                   |             |              |           |            |           | User: admin on |         |
| ¢  | •   ×  |             |                |                   |             |              |           |            |           |                |         |
|    | Amen   | d Existing  | User           |                   |             |              |           |            |           |                |         |
|    | – Use  | r Details   |                |                   |             |              |           | Maintain ( | Questions |                |         |
|    | User   | Name        | tester4        | Base Loc          | ation Loc   | al Store     | *         | Ohanaa D   |           |                |         |
|    | Frien  | dly Name    | Tester4        |                   |             |              |           | Change P   | assword   |                |         |
|    | Title  |             | Mrs            | Forename          | e A         |              |           |            |           |                |         |
|    |        |             |                |                   |             |              |           |            |           |                |         |
|    | Surna  | ame         | Tester4        | Email Add         | dress teste | er4@atos.com |           |            |           |                |         |
|    |        |             |                |                   |             |              |           |            |           |                |         |
|    | Conta  | act Number  |                | Job Type          | Tes         | ter          | *         |            |           |                |         |
|    | User   | Туре        | Local 🗸        | Source S          | ystem       |              |           |            |           |                |         |

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## 3.8 Miscellaneous other New Functionality / Resolved Issues

| Build    | Feature              | Description  |
|----------|----------------------|--|
| 6.0.0949 | New<br>Functionality | The Gateway interface (Glue) has been revised and re-branded as 'Store Recipient Web Services'   |
| 6.0.0949 | Resolved<br>Issue    | Tracker 7560 - Exceptions Mgmt Manual Match – Add source system to the patient search criteria   |
| 6.0.0949 | Resolved<br>Issue    | Tracker 7561- S2S will display an Object Reference error when viewing a remote result unless 'View User Audit on Patient and Results Pages' module permission is set to ON for local account |
| 6.0.1001 | New<br>Functionality | Tracker 7680 - System Administrators to flag patient matching<br>rules which are no longer required as inactive  |
| 6.0.1001 | Resolved<br>Issue    | Tracker 7651 - Incorrect Documents Exception when AMEND document is sent to store with revision string length different to that held in store  |
| 6.0.1001 | Resolved<br>Issue    | Tracker 7666 - Multiple Row Restriction Field Permissions on<br>Requesting organisation causes exception when using<br>cumulative reporting  |
| 6.0.1005 | New<br>Functionality | Tracker 7544 – Remove Split All File Types From<br>'AmendSplitterFromDatabase' screen  |
| 6.0.1005 | New<br>Functionality | Tracker 7624 - Configure Telepath To Support New Immunology Interface  |
| 6.0.1005 | New<br>Functionality | Define multiple style sheets for Gateway Referrals   |

| 6.0.1005 | New<br>Functionality | Tracker 7658 - V6.1 Document Upload: Swap Links For View Doc And View Metadata  |
|----------|----------------------|---|
| 6.0.1005 | New<br>Functionality | Tracker 7681 - V6.1 Add a 'View History' Icon to Toolbar of Results Details Screen  |
| 6.0.1005 | New<br>Functionality | Trackers 7687/88/89 V6.1 New Gateway Type: "Supplementary"<br>Messages - Add "Supplementary" message V1.0 to Recipient<br>Web Services                                    |
| 6.0.1005 | Resolved<br>Issue    | Tracker 7697 – Merged Patient Duplicate ID's in Patient Details ID Tab where patient is in a merge  |
| 6.0.1005 | Resolved<br>Issue    | Tracker 7261 - Document Upload : Store is Not Dealing With<br>Multiple Copied HCPs Correctly  |
| 6.0.1005 | Resolved<br>Issue    | Tracker 7734 - Role Administration Search Screen: Search<br>Criteria is not Restored when returning from role maintenance<br>screen                                       |
| 6.0.1009 | New<br>Functionality | Tracker 6948 - Health Board Cipher Code to Be Included in<br>ReplicatePatient message Following XML 4.1 and XML 6.0<br>PatientInformation Processing                      |
| 6.0.1009 | New<br>Functionality | Tracker 7662 – V6.1 Deceased Flag: Modify 'Find Patient'<br>Search Result List to Include 'Deceased' Indicator  |
| 6.0.1009 | New<br>Functionality | Tracker 7677 - ADT Interface - Web Front-End Changes:<br>The functionality of the ADT tab on the 'Patient Details' page has<br>been revised in this release of SCI Store. |
| 6.0.1009 | Resolved<br>Issue    | Tracker 7020 - Manually Matching Result to a Patient Can Cause Patient Data Corruption  |
| 6.0.1009 | Resolved<br>Issue    | Tracker 7027 – Duplicate ID's Created Due to Being Case Sensitive   |
| 6.0.1013 | Resolved<br>Issue    | Tracker 7815 - Login Screen Message Does Not Wrap   |
| 6.0.1013 | Resolved<br>Issue    | Tracker 7249 - v51 Feedback - Exceptions Mgmt Parse File<br>Action - Confirmation Message Could Be More Informative   |
| 6.0.1017 | New<br>Functionality | Tracker 5256 - Patient Result Report – Add Line Breaks Between<br>Field Sets Of Printer Friendly Reports  |
| 6.0.1017 | New<br>Functionality | Tracker 6821 - Add a 'Clear All' Link On Disciplines Results<br>Selection Control   |
| 6.0.1017 | New<br>Functionality | Tracker 7929 - Add capability for Referral V2.7 to Recipient Web<br>Services  |
| 6.0.1017 | New<br>Functionality | New system setting –AdvancedCounterStatsInterval. This setting determines the time interval in minutes between running the advanced SCI Store windows counters update.    |
| 6.0.1017 | New<br>Functionality | Tracker 7109 - Saved Searches: Error Is Displayed When The<br>Provider Name Is Changed  |
| 6.0.1017 | New<br>Functionality | Tracker 7664 - V6.1 Delete Action On Tabs: Modify Delete Action<br>My Searches And My Patients Tabs To Remove The Word<br>Delete And Replace With An Icon                 |
| 6.0.1017 | New<br>Functionality | Tracker 7870 - Remove 'Save' Action On Toolbar For Web<br>Service Permissions Page  |
| 6.0.1017 | Resolved<br>Issue    | Tracker 7855 - National Document Category Changed -<br>'Interventions' Now 'Intervention records  |
| 6.0.1017 | Resolved<br>Issue    | Tracker 7823 - Change Default Century On Valid To And Valid<br>From Date Fields On The 'User Maintenance' Screen To Allow<br>Them To Accept Future Dates                  |
| 6.0.1017 | Resolved<br>Issue    | Tracker 7888 - Document Management - 'Delete' And 'DeleteAll'<br>Do Not Function As Expected  |
| 6.0.1017 | Resolved<br>Issue    | Tracker 6872 - Non-Mandatory Name Element In 'FindPatient'<br>Criteria Causes 'FindPatient' Web Service Call To Fail If Omitted<br>From Payload - v2-3 And v4-1           |

| 0.0.4047 | Resolved      | Tracker 7867 - Title- Typo In HCPSelector Control - 'Clinician'  |
|----------|---------------|--|
| 6.0.1017 | Issue         | should be 'Clinician'  |
| 6.0.1017 | Resolved      | Tracker 7880 - whereby patient matching rules were being         |
| 0.0.1017 | Issue         | incorrectly saved against Translator services when 1 or more     |
|          |               | patient matching rules have been flagged as inactive             |
| 6.0.1017 | Resolved      | Tracker 7884 –   |
| 0.0.1017 | Issue         | <pre>'p_PatientDocumentSearch_Get_Recently_Viewed' Stored</pre>  |
|          |               | Procedure Regularly Times Out In GGC                             |
| 6.0.1017 | Resolved      | Tracker 7886 - Event Notifications - Requesting Organisation     |
| 0.0.1017 | Issue         | and RequestingHCP Not Always Populated                           |
| 6.0.1017 | Resolved      | Tracker 7890 - Anonymous Patients - Translator Tags Patients as  |
| 0.0.1017 | Issue         | Anonymous Incorrectly  |
| 6 0 1017 | Resolved      | Tracker 7897 - User Maintenance Screen - Module Permissions      |
| 0.0.1017 | Issue         | and View Permissions Buttons Being Incorrectly Disabled When     |
|          |               | No Data Restrictions Exist                                       |
| 6.0.1033 | New           | Tracker 7951 - Modify Translator Definition To Cater for Future  |
| 0.0.1000 | Functionality | Extensions to Interface File Types                               |
| 6.0.1033 | New           | Tracker 7961 - TrakCare Added As a New Source System in SCI      |
| 0.0.1035 | Functionality | Store  |
| 6 0 1022 | Resolved      | Tracker 7649 - Inhibit Creation of Duplicate "Person Tag" in SCI |
| 0.0.1035 | Issue         | Store if Matching Record ID Has "Personal Tag"                   |
| 6 0 1022 | Resolved      | Tracker 7962 – Missing Index for Anonymous Service:              |
| 0.0.1035 | Issue         |  |

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# 4. Version 6.1

## 4.1 Grouping of results on the patient details page

## Overview

This functionality will allow an end user to filter items shown in the results tab at the patient level. The results can be filtered by the following sub-groups:

- Results received today
- Results received in the last 7 days
- Results received in the last 14 days
- Results received in the last 30 days
- All Results

The ranges of results displayed are defined at the individual user level. The filter is based on the "Processed at" date i.e. the date the result was processed into SCI Store.

## Admin User

## System setting: "DefaultResultsRange"

This system setting defines the default range for the site. This is applied to users who do not have a value set. This will be a list type with values of "All", "7 Days", "14 Days" or "30 Days"

## System Setting: 'DefaultResultsDisplayRange'

The 'DefaultResultsDisplayRange' system setting allows the System Administrator to set a global value for the 'Processed Range' dropdown on the 'Results' Tab 'Filter By' section on the 'Patient Details' page. The filter allows the user to filter displayed results based on the 'Processed At' column values on the tab.

The permissible values are:

- All
- Today
- 7 Days
- 14 Days
- 30 Days

The default value for the new setting will be 'All'. Users will be able to set the default value for the dropdown and override the System Setting if required via the new 'User Results Range Default' page which is now available from the 'My Settings' menu. For further information,

A new System Setting called 'DefaultResultsDisplayRange' has been added to allow the System Administrator to set a global value for the 'Processed Range' dropdown on the 'Results' Tab 'Filter By' section on the 'Patient Details' page.

The ability for the System Administrator to set the 'Results Processed Range' value for a user on the 'User Maintenance' screen has been removed – users can now manage their own preferences for this value via the 'My Settings' menu as described above.

The ability for the System Administrator to set the 'Results Processed Range' value for a Role on the 'Role Maintenance' screen has been removed.

#### End User

#### Processed range combo box

The "processed range" combo box can be used to apply a filter on the results listed on the results tab on the patient details page. The values are: Today, 7 Days, 14 Days, 30 Days and All as shown below.



Patient Details: Processed Range

## My Settings: User Results Range Default'

A new item called 'User Results Range Default' has been added to the 'My Settings' menu. This allows users to set their individual preference for the 'Processed Range' dropdown on the 'Results' Tab 'Filter By' section on the 'Patient Details' page and, if desired override the global setting defined by the 'DefaultResultsDisplayRange' system setting. The values are: -

- All
- Today
- 7 Days
- 14 Days
- 30 Days
- Use Site Default
| SCI Store Paisley |                 |   |               |          |                 |          |             |  |  |  |
|-------------------|-----------------|---|---------------|----------|-----------------|----------|-------------|--|--|--|
| Home              | Find Patient    | Find Result   | Find Document | Find Tre | atment Log      |          |             |  |  |  |
|                   |                 |   | Config        | uration  | Exceptions Mgmt | Security | Maintenance |  |  |  |
| Home > I          | My Settings > U | ser Results Ran   | ge            |          |                 |          |             |  |  |  |
| ¢=   🛃            |                 |   |               |          |                 |          |             |  |  |  |
| Filter 0          | Configuration   | Options   |               |          |                 |          |             |  |  |  |
| Results           | Display Range   | Use site default<br>Use site default<br>Today<br>7 Days |               |          |                 |          |             |  |  |  |
|                   |                 | 14 Days<br>30 Days<br>All                               |               |          |                 |          |             |  |  |  |

## Logging on with a user role

When a user logs into Store under a 'Role', the 'Results Processed Range' value will be defined either by the global 'DefaultResultsDisplayRange' or overridden by the value set in the 'User Results Range Default' in the 'My Settings' menu against the logged in user's account.

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# 4.2 Last accessed information

## Overview

# Last patient user accesses

A list of the last 5 users to access a patient record, result or document is now shown in the SCI Store Web application. This audit view shows:

- Name
- System
- Location
- Time

| SCI SCI                  | I Store F                        | aisley                  |                                      |                       |             |            | My                        | Settings /          | About Store  | Log Out    |
|--------------------------|----------------------------------|-------------------------|--------------------------------------|-----------------------|-------------|------------|---------------------------|---------------------|--------------|------------|
| Home                     | Find Patient                     | Find Result             | Find Document                        | Find Treatment Log    |             |            |                           | Patient ID          | :            | Go         |
|                          |                                  | Configuration           | Exceptions Mg                        | mt Security           | Maintenance | Reporting  | General                   | Notification        | าร           |            |
| Home > R                 | tole Administr                   | ation > Patient De      | etails                               |                       |             |            |                           | L L                 | Jser: admin  | on PJSSCI6 |
| \$ A                     | 19 🗟 🎞                           |                         |                                      |                       |             |            | Action                    | ns Select Action    |              | ❤ Go       |
| Patient<br>Patien<br>Ted | t<br><b>nt Name</b><br>Giffen 0: | CHI Dat<br>101675666 01 | <b>e Of Birth Age</b><br>/01/1937 73 | GP<br>ANDERSON, MARG/ | ARET BRUN   | GP Practic | e<br>Al practice          | Consulta            | nt Ward/     | Location   |
| Results                  | Documents                        | Demographics            | ADTs IDs Audit                       | Tree View Treatr      | nent Log    |            |                           |                     |              |            |
| Filter<br>Discip         | By<br>line                       | Selec                   | t UCPN                               | Processed             | Range All   | Go         | Display Mo<br>Group By Re | de<br>eport 🄨 Ungre | oup By Repor | tO         |
| No Dat                   | a To Display                     |                         |                                      |                       |             |            |                           |                     |              |            |
| Last 1                   | Patient Use<br>Iame              | rs Accesses             | Location                             | Time<br>16/08/2010    |             |            |                           |                     |              |            |
| Mr Test                  | pian Eleven P                    | 122016                  | SCI Store Paisley                    | 13:07:21              |             |            |                           |                     |              |            |

The list includes distinct users only with their latest access. The list does not include the current user that is logged in.

When a user views a Local Patient/Result/Document the last 5 user accesses section will be displayed and will contain details of both local and remote accesses

When a user views a Remote Patient/Result/Document the last 5 user accesses section will not be displayed.

The information is visible on the:

- Patient details view
- Result details view
- Document details view.

#### Last access summary

This audit summary shows a count of the number of patients accessed in the users last session.

- This audit information is shown on the home page in a field set above the tabs.
- This view is only displayed the first time a user goes to the homepage and not each time.

| SC SC  | I Store P   | aisley  |   |                |                |                | My Setti     | ings About Store | Log Out    |
|--|---|---|---|----------------|----------------|----------------|--------------|------------------|------------|
| Home   | Find Patient  | Find Result   | Find Document   | Find Treatme   | ent Log        |                |              | Patient ID:      | Go         |
|  | Cor   | figuration  | Exceptions Mgmt   | Security       | Maintenance    | Reporting      | General      | Notifications    |            |
| Home   |   |   |   |                |                |                |              | User: admin      | on PJSSCI6 |
| Syster<br>This is<br>Last A<br>Last log<br>Recently<br>Interfa<br>Click Hi<br>Sho<br>( | m Messages<br>the regressi<br>ccess Summ<br>in Aug 16 201<br>Wewed Rec<br>ence Manageme<br>ere To Check<br>w By Status<br>ull C on C O<br>ta To Display | on test build<br>ary<br>0 11:02AM. You<br>ently Created F<br>nt<br>CHI Webservice<br>ff | of version 6.0.1033<br>accessed 0 patient(s<br>Recently Requested M<br>e Availability | 9.01 of SCI St | Administration | for regression | n testing on | Iv.              |            |

# **System Setting**

The "LastAccessesCount" system setting is used to specify the last accesses shown. The setting defaults to 5, values 3- 8 can be specified.

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# 4.3 UCPN

# Background

The Unique Care Pathway Number (UCPN) is a unique identifier that can be associated with patient referrals. The identifier is used to link referral events and track progress. For example, the UCPN can link an initial GP referral to one or more outpatient appointments or a hospital admission for treatment.

Support for the Unique Care Pathway Number (UCPN) is available in build 6.0.1009 of SCI Store.

The changes include:

- Inbound XML file processing interfaces
- SCI Gateway recipient web service interface
- Document upload interface
- Web Service consumption
- Search via find patient, find result, find document
- Web app display in patient details, result details document details
- Patient search audit

# Number format

The UCPN is 13 characters long. An example valid format is: "ZZZ123456789Z".

The format will be validated against during the processing of input files. This means it must comply with the format defined in the schema.

## File processing

SCI Store can process UCPN information from the following XML file formats:

- InvestigationReport-v6-0.xsd
- DocumentUpload-V2-3.xsd
- TreatmentRequest-v6-0.xsd
- SCI Gateway Referral, Discharge and Clinical Letter xml files

#### Web application search

A new UCPN search field has been incorporated into the 'Find Patient' search form. This field is located on the advanced search criteria section.

The Find Result search form has the UCPN added to its existing search criteria.

The Find Document search form has the UCPN added to the advanced search criteria.

[Note: The Patient Search Audit is updated when a Find Patient search is initiated.]

[Note: UCPN search is disabled for remote data sources search. If a remote data source is selected the UCPN search field will be disabled.]

#### Web application display

The Result Details and Document Details pages now display the UCPN.

The Results and Document tabs of the Patient Details screen have new controls added to allow the user to filter the documents/ results being displayed by UCPN numbers.

For Result Details there may be multiple UCPN's. These are displayed on the ResultDetails.aspx page at the investigation level. The UCPN Filter for Results is populated with the UCPN's that relate to any results for the patient being viewed.

For a specific document there will be one UCPN, this should be displayed on the DocumentInformation.aspx page. The UCPN Filter for Documents is populated with the UCPN's that relate to any documents for the patient being viewed.

On selecting a UCPN to filter on, then clicking on the "GO" Button, a list of results/documents containing the chosen UCPN will be displayed.

#### XML V6.0 Interface

The XML v6.0 interface can now recognise the UCPN for Results via the 'any' tag in the gen:Test\_Set\_Result\_Type structure.

#### **Document Upload V2.3 Interface**

The Document Upload V2.3 Interface can now recognise the UCPN for Documents via the 'any' tag in the "gen:Document\_Data\_Type" structure.

[Note: Build 6.0.1009 does not support the UCPN for the manual document upload process.]

# **Recipient Web Service**

The SCI Gateway Recipient Web Service can map the UCPN sent by SCI Gateway to the correct location for the Document Upload V2.3 Interface. Version 12.3 of SCI Gateway supports the UCPN.

The files types impacted by this change are:

- supplementary-metadata-v1-0.xslt
- referral-metadata-v2-6.xslt
- discharge-metadata-v2-7.xslt
- clinical-letter-metadata-v1-1.xslt

# Audit

The Patient Search Audit report displays the UCPN in the Patient Search Audit Details page.

[Note: The UCPN is added to the t\_PatientSearchAudit table]

# Web service methods

The UCPN search functionality is integrated with V6.0 Web Services Find methods:

- Find Patient
- Find Result
- Find Document

The UCPN display functionality is integrated with V6.0 Web Services Get methods:

- Get Patient
- Get Result
- Get Document

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# 4.4 Miscellaneous other New Functionality / Resolved Issues

| Build    | Feature       | Description   |
|----------|---------------|---|
| 6.1.1037 | Resolved      | Tracker 8002 - 'Actioned' Documents Still Display as Data Errors    |
|          | Issue         | Within the Admin Tab on the Homepage                                |
| 6.1.1037 | Resolved      | Tracker 8032 - Display of Result SET Comments Sometimes Out of      |
|          | Issue         | Sequence if Multiple Lines of Comments Exist                        |
| 6.1.1037 | Resolved      | Tracker 8048 – XML21 Interface - When Address Contains HTML         |
|          | Issue         | Character (e.g. & amp;), It Is Not Converted When Displayed in the  |
|          |               | Demographics/Address Tab  |
| 6.1.1037 | Resolved      | Tracker 8063 – Recipient Web Services - Multiple Match Rules Within |
|          | Issue         | Web.Config not working as expected                                  |
| 6.1.1042 | New           | Tracker 7682 – Remove 'Go' From The Actions Dropdown                |
|          | Functionality |   |
| 6.1.1042 | Resolved      | Tracker 7954 - Multi Page TIF Documents Not Displaying All Pages in |
|          | Issue         | Store   |
| 6.1.1042 | Resolved      | Tracker 8083 - Module Permission Not Being Applied Correctly to     |
|          | Issue         | Tree View   |
| 6.1.1042 | Resolved      | Tracker 8107 - Timeout when viewing Historical result - missing     |
|          | Issue         | indexes   |
| 6.1.1046 | New           | Normalcy Display Changes highlighting to users of Results which     |
|          | Functionality | contain test data which has been flagged as abnormal                |
| 6.1.1046 | New           | Tracker 7347 - Prevent Using Wildcard % Character Combined with     |

|          | Functionality | Comparators in Search Criteria                                    |
|----------|---------------|---|
| 6.1.1046 | New           | Tracker 8094 - V7.0 Extended Document Upload Info - Modify        |
|          | Functionality | Recipient Web Services to Process the Action Date & Document      |
|          |               | Creation Date   |
| 6.1.1046 | New           | Tracker 8095 - V7.0 Extended Document Upload Info - Modify        |
|          | Functionality | Document Upload Logic to Cater for Additional Dates               |
| 6.1.1046 | New           | Tracker 8159 Implement New SMR Ethnic Origin Codes Lookup Table   |
|          | Functionality | to Replace NCDDP Code Lookup                                      |
| 6.1.1046 | Resolved      | Tracker 8119 - Document upload issue when XML contains structured |
|          | Issue         | and unstructured name nodes                                       |
| 6.1.1046 | Resolved      | Tracker 8121 – The 'Forgotten Password' Link and Access to User   |
|          | Issue         | Maintenance Screen Does Not Work When User Name Contains an       |
|          |               | 'Apostrophe' Character  |
| 6.1.1046 | Resolved      | Tracker 8168 - HTML document not displaying correctly in store    |
|          | Issue         |   |

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# 5. Version 7.0

# 5.1 ISD Reference Files Automation

#### Overview

The current method of uploading ISD reference file data involves the user manually triggering the upload from the SCI Store Front-End. This has been changed to bring this interface into line with our other interfaces. This means that the ISD Reference file upload has been integrated into the Windows Service to automate the process of uploading the files.

#### Service definition

The service is designed to run at a suitable time when performance of the other interfaces will not be affected. To facilitate this concept, a time period has been introduced. The ISD reference file upload will only be triggered during the specified time period.

#### Specifying the service time period

The "Amend Service Definition" page has been modified to allow the user to enter a time period for when this Service will be active.

The time period is applicable to the new "ReferenceDataToDatabase" service. The polling interval has been removed for this service as it is not relevant to the time banded service.

# Time band rules

a) The time can be set in half hour increments

b) If the start and end times are set to the same value, nulls are saved to the database.

c) When no time band values have been set, they are displayed as 00:00, 00:00. A service with these time band values will be inactive.

d) If time\_from is less than time\_to (e.g. 09:00 to 12:00) then both times will apply to the current day. The service will run between these times.

e) If time\_from is greater than time\_to (e.g. 23:00 to 02:00) then time\_from will apply across 2 days. The service will run between these times.

# {{{TEMP SECTION}}}}

The new time band controls will only display when DevelopmentOnly mode = "True"

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# 5.2 Compliance with NHS password standards

Background

New functionality has been developed to ensure that SCI Store is compliant with the eHealth NHS National Password Standard (Ref: "20 eHealth NHS Standard - NHS National Password Standard.pdf")

All required functionality has been delivered in Build 6.1.1046.

# **Password complexity**

The minimum password complexity requirements are:

- 1. Shall not be the same as, or contain, the account username;
- 2. Shall contain characters from three of the following four categories:
  - a. uppercase alphabetic characters (A-Z);
  - b. lowercase alphabetic characters (a-z);
  - c. numerals (0-9);
  - d. Non-alphanumeric characters, for example: ! \$ # %.
- 3. Shall be at least 8 characters long.

# Enforce Password change policy

Passwords must be changed at intervals of not more than 3 months (90 days). SCI Store will force users to change passwords when this interval has elapsed. When a password has been changed the old password will be disabled. Using initial/reset password: the initial password shall be used once only, i.e., system enforces a password change on first logon;

[Note: "Enforce Password Change" functionality only relates to users of type "Local & Roles Only"]

[Note: This function is not mandatory except on user account creation by a system administrator.]

# Summary of changes

The 'Password Expires' checkbox has been removed from the User Maintenance screen as it will no longer be permissible to set user account to have a password which does not expire. This will enforce all user accounts with a 'User Type' of "Local" or "Roles Only" to be subject to the password expiry period defined by the value of the "**PasswordExpiry**" system setting.

All other user types are not subject to the password expiry period defined by the value of the "**PasswordExpiry**" system setting. Where the password expiry period has elapsed, users will be forced to change their password when they log in to SCI Store.

In conjunction with the above, the **"PasswordExpiry"** system setting has been amended as follows:

- Where it has not been explicitly set by the system administrator, a default value of 30 days will be set. This will enforce user accounts to change their password after 30 days has elapsed since their previous password change.
- In previous versions of Store there was no limit to the maximum number of days that it could be set to. This has been amended to restrict the maximum number of days to 90.

• At sites where the '**PasswordExpiry**' system setting has been configured to a value which is greater than the new limit of 90 days, the upgrade script will amend the setting value to the new maximum value of 90.

**[Note:** If the password is changed via the 'Change Password' action on the 'User Administration' screen, the user is not forced to change the password on the next login unless the administrator has also selected the 'User must change password at next login' checkbox.]

#### **Password Lockout**

Failure to update password: the system shall lock a user's account if the user fails to change the password 21 days after the due date

An account shall be locked after a maximum of five consecutive failed login attempts. Accounts shall remain locked until a request to unlock is received from an identified member of staff.

# Login Self Audit (Last Access Summary)

It is desirable that on login the user is notified of the last date and time of the last successful login and any failed login attempts; the user must be told what to do if such notification is not what s/he expects.

In the previous release of SCI Store (Version 6.1.1037) additional auditing was added to the 'Homepage' following the user logging into SCI Store. A new "Last Access Summary" control was added, detailing when the user last logged in and how many patients were accessed. This control has been enhanced in this release of Store to additionally display details of the number of failed login attempts made since the user last logged in.

This feature is applicable to the SCI Store Web Application only as shown below

| SC:        | I Store Pa  | aisley         |                        |              |                            | My               | Settings      | About Store    | Log Out    |  |  |  |
|------------|---|----------------|------------------------|--------------|----------------------------|------------------|---------------|----------------|------------|--|--|--|
| Home       | Find Patient  | Find Result    | Find Docume            | nt Find T    | Treatment Log              |                  | Patient       | ID:            | Go         |  |  |  |
|            | Configuration   | on Except      | tions Mgmt             | Security     | Maintenance                | Reporting        | General       | Notifications  |            |  |  |  |
| Home       |   |                |                        |              |                            |                  | User:         | admin on serve | er PJSSCI6 |  |  |  |
| Last A     | ccess Summa   | ary            |                        |              |                            |                  |               |                |            |  |  |  |
| Last log   | in Dec 23 2010  | 8:30AM. You a  | ccessed <b>3</b> patie | nt(s). There | e have been <b>0</b> inval | lid login attemp | ots since you | ır last login. |            |  |  |  |
| If this in | If this information does not match your recent activity please refer to your local security policy. |                |                        |              |                            |                  |               |                |            |  |  |  |
| Recently   | Viewed Rece   | ntly Created R | ecently Requested      | My Favou     | rites Administration       |                  |               |                |            |  |  |  |
| Interfa    | ice Managemen   | t              |                        |              |                            |                  |               |                |            |  |  |  |
| Click He   | ere To Check C  | HI Webservice  | Availability           |              |                            |                  |               |                |            |  |  |  |
| Sho        | w By Status-  |                |                        |              |                            |                  |               |                |            |  |  |  |
| • A        | ll Óon Ooff   | :              |                        |              |                            |                  |               |                |            |  |  |  |
|            |   |                |                        |              |                            |                  |               |                |            |  |  |  |
| No Da      | ta To Display   |                |                        |              |                            |                  |               |                |            |  |  |  |
|            |   |                |                        |              |                            |                  |               |                |            |  |  |  |

#### **Disallow common words**

Default passwords forbidden: the system shall not use default passwords that could be guessed by an attacker; e.g. "password" or "username\_1".

SCI Store now allows a common list of words to be maintained. If the desired password contains one of these words as a substring then it will not be allowed due the common word check.

A new front end maintenance option is available via the Security menu to allow the Administrator to add, edit or delete common words to the "t\_PasswordCommonWords" table. The option is "Security" > "Select Common Words Maintenance".

Example Screenshot:

| Sc Sc      | I Store Pa    | isley         |               |                    |          |             |           |         | My Setti      | ngs About   | Store Log Out    |
|------------|---------------|---------------|---------------|--------------------|----------|-------------|-----------|---------|---------------|-------------|------------------|
| Home       | Find Patient  | Find Result   | Find Document | Find Treatment Log |          |             |           |         |               | Patient ID: | Go               |
|            |               |               | Configuration | Exceptions Mgmt    | Security | Maintenance | Reporting | General | Notifications |             |                  |
| Home > F   | Password Comm | ion Words Mai | ntenance      |                    |          |             |           |         |               | User:       | admin on PJSSCI6 |
| ¢          |               |               |               |                    |          |             |           |         |               |             |                  |
| Create     | New Passwore  | d Common W    |               |                    |          |             |           |         |               |             |                  |
| Passw      | ord Common V  | Vord          |               | Save               |          |             |           |         |               |             |                  |
|            | - D           |               | -             |                    |          |             |           |         |               |             |                  |
| Mainta     | in Password C | ommon word    | 15            |                    |          |             |           |         |               |             |                  |
| Passw<br>1 | ord Common \  | Words         |               |                    |          |             |           |         |               |             |                  |

[An error message will be displayed if the Administrator user tries to enter a common word that already exists in the table].

Note: This feature has been implemented as non-mandatory. On upgrade to build 6.1.1046 or later, the Common Words Table will be blank. It is the responsibility of the Health Board to specify and maintain "common words".

#### **HASH Strength**

Password hashing: the hashing algorithm must hash at least 256 bits; it is desirable that it is capable of hashing at least 512 bits.

Session Caching

Session caching: applications may store session passwords for not more than 24 hours.

#### **Account Sharing**

Account sharing: it is strongly desirable that passwords should identify a specific user and only that user, i.e. no group user IDs and passwords. Group passwords can easily lead to non-accountability and loss of audit control;

It is configurable in Store to restrict simultaneous logins. This extended capability ensures that sites will now have the flexibility to comply with the standard. The following system settings are available:

Where the 'AllowSimultaneousLogins' setting is active at the site and set to 'True' it will be set to 3 after the upgrade script has run – restricting each user account to a maximum of 3 additional logins.

Where the 'AllowSimultaneousLogins' setting is active at the site and set to 'False' it will be set to 0 after the upgrade script has run – preserving the site policy of preventing simultaneous logins.

At sites where the setting has not been specifically set as active, the previous default value was 'True' – which allowed an unlimited amount of simultaneous logins. Following the upgrade, the new default value of 3 will take effect.

In summary, removed as an optional configuration item but allows a max of 3 simultaneous logins. This should strike the right balance between inadvertently having an active login when failing to logout and having an account used multiple times as a group account.

#### REUSE OF PASSWORDS

A new password cannot be the same as the previous 12 passwords and cannot have been used in the previous 12 months.

#### **Password Inactive**

When a user of type "Local or "Roles Only" attempts to log into SCI Store with a password that has expired - and if this length of time since expiry is 21 days or greater the user's account status will be automatically set to inactive. This change has been introduced as part of the implementation of the NHS password standards.

#### Password standards compliance available in Web Service

| Feature                        | Available in Web Service |
|--------------------------------|--------------------------|
| Enforce password change policy | No                       |
| Login Self Audit               | No                       |
| Enforce password change        | No                       |
| Account Sharing                | No                       |
| Password Inactive              | No                       |
| Password complexity            | Yes                      |
| Password Lockout               | Yes                      |
| Disallow common words          | Yes                      |
| HASH Strength                  | Yes                      |
| Session Caching                | Yes                      |
| Reuse of Passwords             | Yes                      |
|                                |                          |

Return to Index

# 5.3 Ad hoc cumulative reporting

#### Background

Cumulative reporting features were implemented in SCI Store 5.1. In brief, this included a "report profiles" admin function to configure how much detail an end user could see in a cumulative report. While this capability identified certain benefit, an additional review of cumulative reporting was initiated by representatives from NHS Forth Valley and NHS Highland. This review concluded the following points with regard to the existing cumulative reporting capability.

- Too complicated for majority of users
- Too much white space

- Too much scrolling
- Setting up report profiles can be an admin overhead
- Performance degradation issues reported

Dr Duncan Lamont (NHS Forth Valley) provided a set of initial requirements that focus the user's starting point for generating a cumulative report on a result set or test result. These requirements have been discussed and elaborated in requirements workshops in 2010 and have now been implemented in SCI Store version 7.0.

#### Objective

To allow an end user to select an option from within the result details page to generate a cumulative report based on the test results within a particular result set.

#### **Report data**

The report query determines the scope of data displayed in the cumulative report. The query is set to return data for all test results specified in the selected result set. This can include test results that match those in the selected result set but are not part of the selected result set.

The report data includes:

- Test result local code
- Result date
- Result value
- Reference range (If applicable)
- Units (If applicable)

# Data point configuration

The data point configuration determines how many report columns are shown on one page. The minimum value is 2 and the maximum value is 10. This value is configured by the administrator as a system setting.

#### Next and Previous navigation buttons

The ad hoc cumulative report uses paged views. The number of columns in the page is determined by the data point value.

If the number of test results returned in the query is greater than the configured number of data points the Next and previous navigation buttons will be enabled.

#### Display of reference ranges and units

The cumulative report will only display reference ranges and units if the data returned in the query includes a change to the reference ranges or units. Highlighting abnormal results Abnormal results are highlighted in bold red text.

#### **Comment indicator**

Investigation and result set comments are highlighted by an asterisk next to the date in the column header for the report.

#### Date row navigation

Clicking on a date in the grid header row will navigate to the corresponding Result Details page for that report.

# End User Walkthrough

#### **Select Investigation Report**

The end user has identified a patient. The system displays the Patient Details Page.

The user selects an Investigation Report from the Results tab

The System navigates to the result details page.

| a SC     | I Store Pa      | aisley           |               |                |                    |                      |                                | My Settings         | About Store    |           | og Out |
|----------|-----------------|------------------|---------------|----------------|--------------------|----------------------|--------------------------------|---------------------|----------------|-----------|--------|
| Home     | Find Patient    | Find Result      | Find Document | Find Treatm    | ent Log            |                      |                                | Patie               | nt ID:         |           | Go     |
|          |                 |                  | Configu       | ration Ex      | ceptions Mgmt      | Security Maintenance | Reporting General Not          | ifications          |                |           |        |
| iome > l | Patient Details |                  |               |                |                    |                      |                                |                     | User: admi     | n on P    | JSSCI  |
| \$ A     | 2 d 🗖           |                  |               |                |                    |                      |                                |                     | Actions Select | t Action. | ~      |
| - Patier | nt              |                  |               |                |                    |                      |                                |                     |                |           |        |
|          | Patient         | Name             | СНІ           | Date Of Birth  | n Age              | GP                   | GP Practice                    | Consultant          | Ward/Loca      | ation     |        |
|          | Test AdHocC     | umulative        |               | 14/03/1982     | 28                 | FABLING, M           | (BANK) Blueville Surgery       |                     |                |           |        |
| Results  | Documents       | Demographics A   | DTa IDa Aud   | t Tree View    | Treatment Log      |                      |                                |                     |                |           |        |
|          |                 |                  |               |                |                    | Pi-ste               |                                |                     |                | _         |        |
| Filte    | r By            |                  |               |                |                    | Display              | / Mode                         |                     |                |           |        |
| Discip   | line            | Select           |               | Y Proc         | tessed Range All   | Group B              | y Report 🍋 Ungroup By Report 😳 |                     |                |           |        |
| 12.0.0   |                 |                  |               |                |                    |                      |                                |                     |                | _         |        |
| 13 Kec   | ords keturned   |                  |               |                |                    |                      |                                |                     |                |           |        |
| R        | eport Id        | Discipline       | Proces        | sed At         | Sample             | Sample Collected     | Investigation                  | Date Reported       | Notes          |           |        |
| CU       | MUL8440_1       | Biochemistry     | 07/01/201:    | 1 20:16:15     | Serum/plasma       | 28/11/2002 14:30:00  | UE & LFT                       | 08/12/2004 00:00:00 | 0              |           | *      |
| CU       | MUL8440_2       | Biochemistry     | 07/01/201     | 1 20:16:18     | Serum/plasma       | 29/11/2002 14:30:00  | UE & LFT                       | 09/12/2004 00:00:00 | 0              |           | *      |
| CU       | MUL8440_3       | Biochemistry     | 07/01/201     | 1 20:16:19     | Serum/plasma       | 30/11/2002 14:30:00  | UE & LFT                       | 10/12/2004 00:00:00 | 0              |           | *      |
| CU       | MUL8440_4       | Biochemistry     | 07/01/201     | 1 20:16:19     | Serum/plasma       | 01/12/2002 14:30:00  | UE & LFT                       | 11/12/2004 00:00:00 |                |           | *      |
| CU       | MUL8440_5       | Biochemistry     | 07/01/201     | 1 20:16:20     | Serum/plasma       | 02/12/2002 14:30:00  | UE & LFT                       | 12/12/2004 00:00:00 | 0              |           | *      |
| CU       | MUL8440_6       | Biochemistry     | 07/01/201     | 1 20:16:20     | Serum/plasma       | 03/12/2002 14:30:00  | UE & LFT                       | 13/12/2004 00:00:00 | 0              |           | 40     |
| CU       | MUL8440_7       | Biochemistry     | 07/01/201     | 1 20:16:20     | Serum/plasma       | 04/12/2002 14:30:00  | UE & LFT                       | 14/12/2004 00:00:00 | 0              |           | *      |
| CU       | MUL8440_8       | Biochemistry     | 07/01/201     | 1 20:16:21     | Serum/plasma       | 05/12/2002 14:30:00  | UE & LFT                       | 15/12/2004 00:00:00 | 0              |           | 40     |
| CU       | MUL8440_9       | Biochemistry     | 07/01/201     | 1 20:16:21     | Serum/plasma       | 06/12/2002 14:30:00  | UE & LFT                       | 16/12/2004 00:00:00 | 0              |           | *      |
| CUN      | IUL8440_10      | Biochemistry     | 07/01/201     | 1 20:16:16     | Serum/plasma       | 07/12/2002 14:30:00  | UE & LFT                       | 17/12/2004 00:00:00 | 0              |           | 44     |
| CUN      | IUL8440_11      | Biochemistry     | 07/01/201     | 1 20:16:17     | Serum/plasma       | 08/12/2002 14:30:00  | UE & LFT                       | 18/12/2004 00:00:00 | 0              |           | 40     |
| CUN      | IUL8440_12      | Biochemistry     | 07/01/201:    | 1 20:16:17     | Serum/plasma       | 09/12/2002 14:30:00  | UE & LFT                       | 19/12/2004 00:00:00 | 0              |           | 44     |
| CUN      | IUL8455_13      | Biochemistry     | 07/01/201     | 1 20:16:18     | Serum              | 17/12/2004 00:00:00  | CK & CE (LDH, AST) & ALT       | 17/12/2004 00:00:00 | 0              |           | 1/4    |
|          |                 |                  |               |                |                    |                      |                                |                     |                |           |        |
| Last     | 1 users to ac   | cess this patier | nt            |                |                    |                      |                                |                     |                |           |        |
|          | Name            | Syst             | tem           | Location       | Т                  | ime                  |                                |                     |                |           |        |
| WScred   | Is-Friendly Nam | e ws60TestApp    | WS            | creds-System L | ocation[11/01/2011 | 14:53:39             |                                |                     |                |           |        |
|          |                 |                  |               |                |                    |                      |                                |                     |                |           |        |

Open the Cumulative Report from the results details page

From the result details page the user selects the "Cumulative" button at the right-hand side of the Result Set header.

The system navigates to the ad hoc cumulative report page

| SC 24   | I Store F                | Paisley     |          |                    |        |              |                  |                   | М       | y Settings | About Store      | Log Out    |
|---------|--------------------------|-------------|----------|--------------------|--------|--------------|------------------|-------------------|---------|------------|------------------|------------|
| Home    | Find Patient             | Find Re     | sult     | Find Document      | Find T | reatment Log |                  |                   |         | Patie      | nt ID:           | Go         |
|         |                          | Configur    | ation    | Exceptions Mg      | jmt    | Security     | Maintenance      | Reporting         | General | Notificat  | tions            |            |
| Home >  | Find Patient >           | Patient Det | ails > R | lesult Details     |        |              |                  |                   |         |            | User: admin o    | on PJSSCI6 |
| - 0     |                          |             |          |                    |        |              |                  |                   |         |            | Contract of      | ation (11) |
| 9 D     |                          |             |          |                    |        |              |                  |                   |         |            | Actions Select A | ction 🚩    |
| - Patie | nt                       |             |          |                    |        |              |                  |                   |         |            |                  |            |
|         | Patient Nan              | ne          | CHI      | Date Of Birth      | Age    | GP           |                  | GP Practice       |         | Consultant | Ward/Lo          | cation     |
| Те      | est AdHocCumi            | ulative     |          | 14/03/1982         | 28     | FABLING,     | M (BAN           | K) Blueville Surg | ery     |            |                  |            |
| Repo    | rt                       |             |          |                    |        |              |                  |                   |         |            |                  |            |
| Curre   | nt Report                |             | UE 8     | 8 LET              |        |              |                  |                   |         |            | C                | umulative  |
| Repor   | rt Requestor             |             |          |                    |        |              |                  |                   |         |            |                  |            |
| FABLIN  | NG, M                    |             | Des      | cription           |        |              | Value            | Range             |         | Unit       | Normal           | cy Notes   |
| Reque   | estor Locatio            | n           | Pota     | assium             |        |              | 3.8              | 3.5 - 5.0         |         | mmol/l     |                  |            |
| (BANK   | (BANK) Blueville Surgery |             |          | arb                |        |              | 24               | 23 - 31           |         | mmol/l     |                  |            |
| Repor   | rt Identifier            |             | Albu     | umin               |        |              | 45               | 37 - 50           |         | g/l        |                  |            |
| CUMUL   | L8440_12                 |             | Urea     | a                  |        |              | 5.4              | 2.5 - 7.0         |         | mmol/l     |                  |            |
| Discip  | oline                    |             | Cre      | atinine            |        |              | 83               | 60 - 120          |         | umol/l     |                  |            |
| Bioche  | emistry                  |             | Prot     | tein               |        |              | 67               | 62 - 80           |         | g/l        |                  |            |
| Samp    | le Туре                  |             | Alk      | Phos               |        |              | 220              | 60 - 270          |         | iu/l       |                  |            |
| Serum   | /plasma                  |             | Alt      |                    |        |              | 14               | 2 - 40            |         | iu/l       |                  |            |
| Samp    | le Collected             |             | Bilir    | ubin               |        |              | 20               | 3 - 30            |         | umol/l     |                  |            |
| 09/12/  | 2002 14:30:00            | )           | Gan      | nma GT             |        |              | 35               | 4 - 45            |         | iu/l       |                  |            |
| Samp    | le Received              |             | AST      |                    |        |              | 21               | 5 - 40            |         | iu/l       |                  |            |
| 30/11/  | 2002 15:56:00            | )           |          |                    |        |              |                  |                   |         |            |                  |            |
| Proce   | ssed Into Sto            | ore         | Sam      | ple Comments       |        | UESTEDS on   | oments on the S  |                   |         |            |                  |            |
| 07/01/  | 2011 20:16:17            | 7           | Ane      | cample of a SERVIN | LE REQ | UESTEKS COI  | ninents on the s | SAMPLE            |         |            |                  |            |
| Quick   | : Links                  |             |          |                    |        |              |                  |                   |         |            |                  |            |
| » All R | Results for Pati         | ent         | _        |                    |        |              |                  |                   |         |            |                  |            |
|         |                          |             |          |                    |        |              |                  |                   |         |            |                  |            |
| - Last  | 1 users to a             | ccess this  | result   |                    |        |              |                  |                   |         |            |                  |            |
|         | Name                     | Syste       | m        | Location           |        | Time         |                  |                   |         |            |                  |            |
| WScree  | ds-Friendly              | -COT        |          | WScreds-System     | 11/01  | 1/2011       |                  |                   |         |            |                  |            |
| Name    | W                        | sourestAp   | P        | Location           | 15:47  | 7:22         |                  |                   |         |            |                  |            |
|         |                          |             |          |                    |        |              |                  |                   |         |            |                  |            |

# **Open Cumulative report filter (Select Tests)**

The user clicks the "Select Test" button from the right hand side of the report header. A pop up appears that allows the user to select the tests they want to appear in the view.

| SCI 🔓                | Store P                  | Paisley          |             |                            |                  |                |             |                                   | М       | y Settings | About Store | Log Out      |
|----------------------|--------------------------|------------------|-------------|----------------------------|------------------|----------------|-------------|-----------------------------------|---------|------------|-------------|--------------|
| Home                 | Find Patient             | Find Result      | t Find D    | ocument f                  | Find Tre         | atment Log     |             |                                   |         | Patier     | nt ID:      | Go           |
|                      |                          | Configuratio     | on Exc      | eptions Mgn                | nt S             | ecurity        | Maintenance | e Reporting                       | General | Notificati | ions        |              |
| Home > Fir           | nd Patient >             | Patient Details  | > Result 0  | etails > Cum               | ulative          | Report         |             |                                   |         |            | User: admin | on PJSSCI6   |
| ¢                    |                          |                  |             |                            |                  |                |             |                                   |         |            |             |              |
| Patient<br>F<br>Test | Patient Nam<br>AdHocCumu | ne CH<br>Ilative | II Date     | <b>Of Birth</b><br>03/1982 | <b>Age</b><br>28 | GP<br>FABLING, | M (BAI      | GP Practice<br>NK) Blueville Surg | ery     | Consultant | Ward/L      | ocation      |
| Cumulat              | ive Report               |                  |             |                            |                  |                |             |                                   |         |            | S           | Select Tests |
| ✓ Next               | Prev ►                   | Report Legen     | d : Associa | ated Comment               | ts= '*', i       | Abnormal R     | esult = red |                                   |         |            |             |              |
| TEST                 | 19/12/                   | 2004* 18/1       | 2/2004*     | 17/12/200                  | 4* 17            | /12/2004       | 17/12/200   | 4 16/12/2004*                     |         |            |             |              |
| Potassiu             | m 3.                     | 8                | 3.8         | 3.8                        |                  |                |             | 4.5                               | -       |            |             |              |
| Bicarb               | 2                        | 4                | 24          | 24                         |                  |                |             | 23                                |         |            |             |              |
| Albumin<br>37 - 50 g | g/l 4:                   | 5                | 45          | 45                         |                  |                |             | 46                                |         |            |             |              |
| Albumin<br>37 - 55 g | p/l                      |                  |             |                            |                  |                |             |                                   |         |            |             |              |
| Urea                 | 5.                       | 4                | 5.4         | 5.4                        |                  |                |             | 5.4                               |         |            |             |              |
| Creatinin            | ne 8                     | 3                | 83          | 83                         |                  |                |             | 87                                |         |            |             |              |
| Protein              | 6                        | 7                | 67          | 67                         |                  |                |             | 57                                |         |            |             |              |
| Alk Phos             | 22                       | 20               | 220         | 220                        |                  |                |             | 130                               |         |            |             |              |
| Alt                  | 1                        | 4                | 14          | 14                         |                  |                | 14          | 14                                |         |            |             |              |
| Bilirubin            | 2                        | 0                | 20          | 20                         |                  |                |             | 20                                |         |            |             |              |
| Gamma                | GT 3                     | 5                | 35          | 35                         |                  |                |             | 35                                |         |            |             |              |
| AST                  | 2                        | 1                | 21          | 21                         |                  | 21             |             | 21                                |         |            |             |              |

# Edit Cumulative report filter (Select Tests)

The user can add or remove tests from the cumulative report.

When selections have been made the user clicks the "Cumulate Tests" Button at the bottom of the pop up to return to the report.

A checkbox function to "Select all" exists on the pop up.

| Sci Sci               | Store Pais                    | ley                   | compart find Tec         | atmost Log          |                  |           |                        |                       | My Set     | tings About Store Log Out |
|-----------------------|-------------------------------|-----------------------|--------------------------|---------------------|------------------|-----------|------------------------|-----------------------|------------|---------------------------|
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
| Home > Fin            | d Patient > Patien            | nt Details > Result D | etails > Cumulative      | Report              |                  |           |                        |                       |            | User: admin on PJSSCI6    |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       | Patient Nam<br>Test AdHocCumu | le Cl<br>lative       | HI Date Of I<br>14/03/19 | Birth Age<br>982 28 | GP<br>FABLING, M |           | GP Pra<br>BANK) Bluevi | ctice<br>ille Surgery | Consultant | Ward/Location             |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
| Cumulati              | ve Report                     |                       |                          |                     |                  |           |                        |                       |            | Select Tests              |
| KINCX                 | Prev > Repo                   | ort Legend : Associa  | ted Comments= '=',       | Abnormal Res        | t Test Results   |           |                        |                       |            |                           |
| TEST                  | 19/12/2004                    | * 18/12/2004*         | 17/12/2004* 17           | /12/2004            |                  | □ Sele    | ct All                 |                       |            |                           |
| Potassium             | n 3.8                         | 3.8                   | 3.8                      |                     |                  |           |                        |                       |            |                           |
| Bicarb                | 24                            | 24                    | 24                       |                     | Potassium        |           |                        |                       |            |                           |
| Albumin<br>37 - 50 g  | 45                            | 45                    | 45                       | V                   | Bicarb           |           |                        |                       |            |                           |
| Albumin<br>37 - 55 g/ |                               |                       |                          |                     | Albumin          |           |                        |                       |            |                           |
| Urea                  | 5.4                           | 5.4                   | 5.4                      |                     | Creatizian       |           |                        |                       |            |                           |
| Creatinin             | e 83                          | 83                    | 83                       |                     | Creatinine       |           |                        |                       |            |                           |
| Protein               | 67                            | 67                    | 67                       |                     | Protein          |           |                        |                       |            |                           |
| Alk Phos              | 220                           | 220                   | 220                      |                     | Alk Phos         |           |                        |                       |            |                           |
| Alt                   | 14                            | 14                    | 14                       |                     | Alt              |           |                        |                       |            |                           |
| Bilirubin             | 20                            |                       |                          |                     | Bilirubin        |           |                        |                       |            |                           |
| Gamma G               |                               |                       |                          |                     | Gamma GT         |           |                        |                       |            |                           |
| AST                   | 21                            | 21                    | 21                       | 21                  | AST              |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     | Cumul            | ate Tests |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |
|                       |                               |                       |                          |                     |                  |           |                        |                       |            |                           |

# Display revised cumulative report test selection

Having navigated from the select tests pop up, the user can view the revised report with the test selection they have made in the pop up.

| Store Pa      | isley   |   |   |   |  |  | м   | y Settings  | About Store   | Log Out  |
|---------------|---|---|---|---|--|--|---|---|---|--|
| nd Patient    | Find Result   | Find Document   | Find Tr   | eatment Log   |  |  |   | Patier  | nt ID:  | Go   |
| Co            | onfiguration  | Exceptions M  | gmt s   | Security  | Maintenance  | Reporting  | General   | Notificat   | ions  |  |
| Patient > Pat | tient Details >   | Result Details > Cu   | imulative   | Report  |  |  |   |   | User: admin   | on PJSSCI6   |
|               |   |   |   |   |  |  |   |   |   |  |
|               |   |   |   |   |  |  |   |   |   |  |
| tient Name    | СНІ   | Date Of Birth   | Age   | GP  |  | GP Practice  |   | Consultant  | Ward/Lo   | cation   |
| dHocCumulat   | ive   | 14/03/1982  | 28  | FABLING,  | M (BAN   | K) Blueville Surg  | lery  |   |   |  |
| e Report      |   |   |   |   |  |  |   |   | Se  | elect Tests  |
|               |   |   |   |   |  |  |   |   |   |  |
| Prev ► R      | eport Legend :  | Associated Commo  | ents= '*',  | , Abnormal R  | esult = red  |  |   |   |   |  |
| 19/12/200     | 04* 18/12/2   | 004* 17/12/20   | 04* 17  | /12/2004  | 17/12/2004   | 16/12/2004*  |   |   |   |  |
| 3.8           | 3.8   | 3.8   |   |   |  | 4.5  | -   |   |   |  |
| 24            | 24  | 24  |   |   |  | 23   |   |   |   |  |
|               | d Patient<br>CC<br>Patient > Patient > Patient > Patient<br>dHocCumulat<br>e Report<br>Prev → R<br>19/12/200<br>3.8<br>24 | Id Patient       Find Result         Configuration         Patient > Patient Details >         tient Name       CHI         dHocCumulative         a Report         19/12/2004*       18/12/2         3.8       3.8         24       24 | Id Patient       Find Result       Find Document         Configuration       Exceptions M         Patient > Patient Details > Result Details > Cu         tient Name       CHI       Date Of Birth         dHocCumulative       14/03/1992         e Report         19/12/2004*       18/12/2004*       17/12/20         3.8       3.8       3.8         24       24       24 | Ind Patient       Find Result       Find Document       Find Tr         Configuration       Exceptions Mgmt         Patient > Patient Details > Result Details > Cumulative         tient Name       CHI       Date Of Birth       Age         dHocCumulative       14/03/1982       28         e Report       Prev > Report Legend : Associated Comments= '*'         19/12/2004*       18/12/2004*       17/12/2004*       17         3.8       3.8       3.8         24       24       24       24 | Ind Patient       Find Result       Find Document       Find Treatment Log         Configuration       Exceptions Mgmt       Security         Patient > Patient Details > Result Details > Cumulative Report         tient Name       CHI       Date Of Birth       Age       GP         dHocCumulative       14/03/1982       28       FABLING,         a Report       Prev > Report Legend : Associated Comments= '*', Abnormal R       19/12/2004*       17/12/2004*       17/12/2004         3.8       3.8       3.8       3.8         24       24       24       24 | Ind Patient       Find Result       Find Document       Find Treatment Log         Configuration       Exceptions Mgmt       Security       Maintenance         Patient > Patient Details > Result Details > Cumulative Report       Maintenance       Maintenance         tient Name       CHI       Date Of Birth       Age       GP         dHocCumulative       14/03/1982       28       FABLING, M       (BAN         e Report       Prev >       Report Legend : Associated Comments= '*', Abnormal Result = red         19/12/2004*       18/12/2004*       17/12/2004*       17/12/2004         3.8       3.8       3.8       3.8         24       24       24       24 | Ind Patient       Find Result       Find Document       Find Treatment Log         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting         Patient > Patient Details > Result Details > Cumulative Report       Patient > Patient Details > Result Details > Cumulative Report       Previous       GP       GP Practice         tient Name       CHI       Date Of Birth       Age       GP       GP Practice         dhocCumulative       14/03/1982       28       FABLING, M       (BANK) Blueville Surger         e Report       Prev > Report Legend : Associated Comments= '*', Abnormal Result = red       19/12/2004*       18/12/2004*       17/12/2004       16/12/2004*         3.8       3.8       3.8       4.5       24       24       23 | Ind Patient       Find Document       Find Treatment Log         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General         Patient > Patient Details > Result Details > Cumulative Report       Patient > Patient Details > Result Details > Cumulative Report       Patient > Patient Details > Result Details > Cumulative Report         tient Name       CHI       Date Of Birth       Age       GP       GP Practice         dhocCumulative       14/03/1982       28       FABLING, M       (BANK) Blueville Surgery         e Report       Prev > Report Legend : Associated Comments= '*', Abnormal Result = red       19/12/2004*       18/12/2004*       17/12/2004       16/12/2004*         3.8       3.8       3.8       4.5       24       24       23 | Ind Patient       Find Result       Find Document       Find Treatment Log       Patier         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Notificat         Patient > Patient Details > Result Details > Cumulative Report       Patient       Patient | Ind Patient       Find Result       Find Document       Find Treatment Log       Patient ID:         Configuration       Exceptions Mgmt       Security       Maintenance       Reporting       General       Notifications         Patient > Patient Details > Result Details > Cumulative Report       Waintenance       Report       User: admin         tient Name       CHI       Date Of Birth       Age       GP       GP Practice       Consultant       Ward/Lo         dHocCumulative       14/03/1982       28       FABLING, M       (BANK) Blueville Surgery       Security         e Report       Security       Security       Security       Security       Security         19/12/2004*       18/12/2004*       17/12/2004*       17/12/2004       16/12/2004*       56         24       24       24       24       23       23 |

#### **Using Next and Previous Buttons**

In the report view the user can click on the next and previous buttons to navigate the available data.

The "Current View" of the report will always display the full number of report columns that correspond to the configured data point value.

If there is no more data available either the Next/Previous button will be greyed out.

| ome Fi    | nd Patient Fi    | ind Result     | Find Document        | Find Treat   | ment Log      |             |                  |         | Patien     | t ID:          | 0        |
|-----------|------------------|----------------|----------------------|--------------|---------------|-------------|------------------|---------|------------|----------------|----------|
|           | Con              | figuration     | Exceptions Mg        | mt Sec       | curity        | Maintenanc  | e Reporting      | General | Notificati | ons            |          |
| me > Find | Patient > Patier | nt Details > R | tesult Details > Cun | nulative Re  | port          |             |                  |         |            | User: admin or | PJSS(    |
| 2         |                  |                |                      |              |               |             |                  |         |            |                |          |
|           |                  |                |                      |              |               |             |                  |         |            |                |          |
| Patient   | tiont Name       | CHI            | Date Of Birth        | 4.00         | CR            |             | CB Practice      |         | Concultant | Ward (Loc      | tion     |
| Test A    | tient name       | Chi            | 14/03/1082           | 28 1         | GP<br>FABLING | м (84       | NK) Blueville Su |         | Consultant | ward/Loca      | ation    |
|           |                  |                |                      |              |               |             |                  |         |            |                |          |
| umulativ  | e Report         |                |                      |              |               |             |                  |         |            | Sele           | ct Tests |
| ♦ Next    | Prov F Rep       | ort Legend : / | Associated Comme     | nts= '*', Ab | normal R      | esult = red |                  |         |            |                |          |
| TEST      | 15/12/2004       | • 14/12/20     | 004 13/12/2004       | 12/12/3      | 2004 11       | /12/2004    | 10/12/2004       |         |            |                |          |
|           | 3.5              | 3.5            | 3.5                  | 4.9          |               | 3.5         | 3.2              |         |            |                |          |
| Potassium |                  |                |                      |              |               |             |                  |         |            |                |          |

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# 5.4 Extended document upload information

## Document upload logic

The document upload interfaces have been extended to process and display new date fields that can be supplied in the SCI Gateway file format. The fields are:

- Action Date; and
- Document Creation Date

The SCI Gateway message that could include these data types are:

- Discharge messages versions 2.3, 2.4, 2.5, 2.6 and 2.7.
- Referral messages versions 2.3, 2.4, 2.6 and 2.7.
- Clinical letters versions 1.0 and 1.1

#### Visibility to local and remote users

The SCI Store front end user screens have been enhanced to display these new fields to local and remote users via the 4.1 and 6.0 search provider mechanisms.

A new date column labelled "Action Date" has been added to the right hand side of the Document Date in the following web application document lists:

- Find Document List (FindDocument.aspx);
- Patient Document List (PatientDetails.aspx (Documents Tab))

The screen capture below shows the patient details document tab:

| SC SC      | I Store F      | Paisley         |         |             |               |                 |              |                   |              |                |               | My Settings   | About        | Store    |
|------------|----------------|-----------------|---------|-------------|---------------|-----------------|--------------|-------------------|--------------|----------------|---------------|---------------|--------------|----------|
| Home       | Find Patient   | Find Result     | Find E  | Document    | Find Treate   | nent Log        |              |                   |              |                |               | Patien        | t ID:        |          |
|            |                |                 |         | Config      | uration       | Exceptions Mgmt | Security     | Maintenance       | Reporting    | General        | Notifications |               |              |          |
| Home >     | Find Patient > | Patient Details |         |             |               |                 |              |                   |              |                |               |               | User:        | admin on |
| <u>6 8</u> | ø a 🗖          | A               |         |             |               |                 |              |                   |              |                |               | Actions       | elect Action |          |
| ~ L)       |                |                 |         |             |               |                 |              |                   |              |                |               | , and a lot   | 01001710101  |          |
| Patier     | nt             |                 |         |             |               |                 |              |                   |              |                |               |               |              |          |
|            | TectOr         | Patient Name    | entTab  |             | 1500          | HI              | Date Of Birt | h Age             | GP           | GP Practice    | Consul        | tant          | Ward/        | Location |
|            | rescou         | other Docum     | lentrab |             | 1509.         | 556677          | 15/09/1955   | 55                |              |                |               |               |              |          |
| Results    | Documents      | Demographics    | ADTs    | IDs Audi    | Tree View     | Treatment Log   |              |                   |              |                |               |               |              |          |
|            |                |                 |         |             |               | -               |              |                   |              |                |               |               |              |          |
| Filter     | By             |                 |         |             |               |                 |              |                   |              |                |               |               |              |          |
| Cate       | Jory An Catego | ories           | ✓ 50    | ib Category |               | v               |              | Sea               | arch history | Go             |               |               |              |          |
| 14.00      | eerde Deturne  | d               |         |             |               |                 |              |                   |              |                |               |               |              |          |
| 14 Ke      | corus keturne  | u               |         |             |               |                 |              |                   |              | $\sim$         |               |               |              |          |
|            | Title          | 8               | Rev.    |             | Catego        | ny              | Specialty    | Document Date     | a 🔰          | Action Date    | Sensitivity   | Last Accessed | Info         | Notes I  |
| Doc        | umentTabTest   | New Document    | 001     |             | Care pl       | ans             | Cardiology   | 20/04/2004 15:55: | 00 171       | 1/2010 12:10 1 | 4 S           |               | 0            | 0        |
| Doc        | umentTabTest   | New Document    | 002     | Corr        | espondence /  | NHS24 letter    | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | s             |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 002     |             | Reports /     | ECG             | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 3 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 002     |             | Reports / Oth | er report       | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 5 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 002     |             | Reports / AH  | P report        | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 6 S           |               |              |          |
| Doc        | umentTabTest   | New Document    | 002     | Reports     | s / Shared as | sessment report | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 7 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 002     | R           | eports / Imag | ing report      | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 8 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 002     | R           | eports / Imag | ing report      | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:11:1 | 9 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 001     | R           | eports / Imag | ing report      | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:10:1 | 2 S           |               |              |          |
| Doc        | umentTabTest   | New Document    | 001     | Reports     | s / Shared as | sessment report | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:10:1 | 3 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 001     |             | Reports / All | reports         | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:10:1 | 3 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 001     | Reports     | s / Shared as | sessment report | Cardiology   | 20/04/2004 15:55: | 00 17/1      | 1/2010 12:10:1 | 3 S           |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 001     |             | Reports /     | ECG             | Cardiology   | 20/04/2004 15:55: | 00 7/1       | 1/2010 12:10:1 | s             |               | 0            |          |
| Doc        | umentTabTest   | New Document    | 001     | R           | eports / Imag | ing report      | Cardiology   | 20/04/2004 15:55: | 00 11/1      | 1/2010 12:10:1 | 5 S           |               | 0            |          |
|            |                |                 |         |             |               |                 |              |                   |              |                |               |               |              |          |
| CLast 1    | users to ac    | cess this pat   | ient    |             |               |                 |              |                   |              | $\smile$       |               |               |              |          |
|            | Name           |                 | System  |             | Locatio       | n               | Time         |                   |              |                |               |               |              |          |
| Mr Tes     | tplan Fourteen | PJSSCI6         |         | SCI         | Store Paisle  | y 17/11/20      | 10 12:17:27  |                   |              |                |               |               |              |          |

(Note: The action date field is populated by the "DocumentActionDate" columns in the database tables that relate to Patient Document Search and Patient Document Search History).

#### **Recipient Web Services**

The Recipient Web Service has been extended to save the 'Action Date' and 'Document Creation Date' to SCI Store.

- For referral types Referral Date = Action Date
- For discharge types Discharge Date = Action Date

# Additional information

At present, the 'Document Action Date' and 'Document Created Date' are not supported by XML Document Upload interface or the manual document upload function. Instead, the current date and time of the upload is being used to populate both fields in the database for these functions. A decision to add these fields to the XML and manual upload process is currently being reviewed. Return to Index

# 5.5 Normalcy Business Rules

# Background

When a lab result file is processed by SCI Store, business rules exist to determine if a test result (and subsequently Result Set and Report) is abnormal. This calculation is used to signify how the result value is displayed in the SCI Store web application. E.g., abnormal results are currently displayed in bold red text on the result details page, illustrated below.

| e1   | 1403523738 | 14/03/1952 | 58 |       | Kapasi, Ur M A | (GKHC/) Green | ock Health Centre / |
|------|------------|------------|----|-------|----------------|---------------|---------------------|
| Blog | d          |            |    |       |                |               |                     |
| Des  | scription  |            |    | Value | Range          | Unit          | Normalcy Notes      |
| Sod  | lium       |            |    | 111   | 136 - 148      | mmol/l        | A                   |
| Pot  | assium     |            |    | 4.7   | 3.8 - 5        | mmol/I        | N                   |
| Chi  | oride      |            |    | 106   | 95 - 105       | mmol/l        | A (Chloride)        |
| Bica | arbonate   |            |    | 27    | 22 - 30        | mmol/l        | N                   |
|      |            |            |    |       |                | B1 1 2        |                     |

## Changes to normalcy rules

Normalcy is already displayed in the application at investigation and test result level but in an inconsistent manner. The determination of Normalcy is currently made at the point when an investigation or test result is being displayed.

This change has been made to:

- Determine normalcy when a lab report is processed into SCI Store. This ensures that the decision is made once.
- Bring consistency to the display of abnormal results at the investigation level across the Application.

# Web application

The following Homepage tabs have an additional column that indicates the presence / absence of an abnormal flag for each result contained in the list:

- Recently Created > Results
- Recently Viewed > Results
- Recently Requested > Results

This is illustrated in the screen capture below:

| ş  | <mark>}</mark> SCI | Store Paisle        | ey               |                   |                |                          |     |           |         | My Settings   | About Store | Log Out    |
|----|--------------------|---------------------|------------------|-------------------|----------------|--------------------------|-----|-----------|---------|---------------|-------------|------------|
| H  | lome               | Find Patient Find   | d Result Find    | Document Find     | Treatment Lo   | 3                        |     |           |         | Pati          | ent ID:     | Go         |
|    |                    |                     | Configuratio     | n Exceptions      | Mgmt Se        | curity Maintenar         | ıce | Reporting | General | Notifications |             |            |
| He | ome                |                     |                  |                   |                |                          |     |           |         |               | User: admin | on PJSSCI6 |
| ſ  | Recently           | Viewed Recently Cre | eated Recently i | Requested My Favo | urites Adminis | tration                  |     |           |         |               |             |            |
|    | Patients           | Results Docu        | ments            |                   |                |                          |     |           |         |               |             |            |
|    | 5 Reco             | rds Returned        |                  |                   |                |                          |     |           |         |               |             |            |
|    | Sourc              | e Name              | Sample Date      | Investigation     | CHI            | <b>Report Identifier</b> |     |           |         |               |             |            |
|    | Local              | Dave Edwards        | 13/02/2007       | Lipids            | 0504567713     | H03,08058012.G           | he  |           |         |               |             |            |
|    | Local              | Dave Edwards        | 13/02/2007       | FBC               | 0504567713     | H03,08058012.G           | *   |           |         |               |             |            |
|    | Local              | Sarah Paterson      | 12/06/2002       | LIPIDS            | 3656472444     | R,02.0087145.Y           | *   |           |         |               |             |            |
|    | Local              | Sarah Paterson      | 12/06/2002       | Haemolytic Index  | 3656472444     | R,02.0087145.Y           | he  |           |         |               |             |            |
|    | Local              | Sarah Paterson      | 12/06/2002       | Electrolytes      | 3656472444     | R,02.0087145.Y           | he  |           |         |               |             |            |

The red flag icon signifies abnormal results and a 'greyed out' flag signifies results which have not been flagged as abnormal.

[Note: the use of the flag icon replaces previous home page functionality where red text across the whole row was used to signify abnormal results.]

# Patient Details – Results Tab

The 'Results' tab on the 'Patient Details' screen now has an additional column which uses the same mechanism described for the 'Homepage' tabs to indicate abnormality.

| SC SC           | I Store Pa                           | isley        |                   |                          |                       |             |                                 |                            |                             | My Settings | About         | Store    | Log Out |
|-----------------|--------------------------------------|--------------|-------------------|--------------------------|-----------------------|-------------|---------------------------------|----------------------------|-----------------------------|-------------|---------------|----------|---------|
| Home            | Find Patient                         | Find Result  | Find Document     | Find Treatment Log       |                       |             |                                 |                            |                             | Pa          | itient ID:    |          | Go      |
|                 |                                      |              | Configuration     | Exceptions Mgm           | t Security            | Maintenance | Reporting                       | General                    | Notification                | 15          |               |          |         |
| Home > F        | Patient Details                      |              |                   |                          |                       |             |                                 |                            |                             |             | User:         | admin on | PJSSCI  |
| ¢ 🔒             | 19 🙃 🖽                               |              |                   |                          |                       |             |                                 |                            |                             | Actions     | Select Action |          | ~       |
| - Patier        | nt<br>Patient Name<br>Sarah Patersor | :<br>1       | CHI<br>3656472444 | Date Of Bin<br>20/01/196 | <b>th Age</b><br>0 51 | GP          | GP Practice<br>(GOV1)           |                            | Consultant<br>Dr.A.M.Mullin |             | Ward/I        | ocation  |         |
| Results         | Documents                            | Demographics | ADTs IDs Audt     | Tree View Treat          | nent Log              |             |                                 |                            |                             |             |               |          |         |
| Filte<br>Discip | r By                                 | Sele         | ct UCPN           | Processed                | Range All             | Go          | Display Mode<br>Group By Report | <ul> <li>Ungrou</li> </ul> | p By Report C               |             |               |          |         |
| 1 Reco          | ord Returned                         |              |                   |                          |                       |             |                                 |                            |                             |             |               |          |         |
| Re              | port Id                              | Discipline   | Processed At      | Sample                   | Sample Collecte       | :d          | Investiga                       | ation                      |                             | Date Repo   | rted I        | lotes    |         |
| R,02.           | 0087145.Y H                          | aematology   | 20/01/2011 21:08: | 10 Blood 1               | 2/06/2002 11:00       | :00 Electro | lytes & Haemoly                 | tic Index & I              | LIPIDS 11,                  | /06/2002 12 | 2:30:00       |          | - 1     |

Display mode: Group by report

Flag status in relation to "Display modes"

- **Group by report** if one or more investigations within the report has a test result that is abnormal the red flag will be shown for that report.
- **Ungroup by report** If one or more test results within an investigation is abnormal the red flax will be shown for that investigation

| <del>ି</del> ନ୍ SC | I Store Pa                           | isley        |                   |                  |                         |           |                 |                                 |             | м                           | ly Settings | About Store | L      | og Out |
|--------------------|--------------------------------------|--------------|-------------------|------------------|-------------------------|-----------|-----------------|---------------------------------|-------------|-----------------------------|-------------|-------------|--------|--------|
| Home               | Find Patient                         | Find Result  | Find Document     | Find Treatment   | t Log                   |           |                 |                                 |             |                             | Patie       | nt ID:      |        | Go     |
|                    |                                      |              | Configuration     | Exceptions I     | lgmt So                 | ecurity   | Maintenance     | Reporting                       | General     | Notifications               | ;           |             |        |        |
| Home > P           | Patient Details                      |              |                   |                  |                         |           |                 |                                 |             |                             |             | User: admir | n on P | JSSCI  |
| ⇔ 🗛                | 19 🗟 🖽                               |              |                   |                  |                         |           |                 |                                 |             |                             | Actions Se  | lect Action |        | *      |
| Patier             | nt<br>Patient Name<br>Sarah Patersor | 1            | CHI<br>3656472444 | Date 0<br>20/01, | <b>f Birth</b><br>/1960 | Age<br>51 | GP              | GP Practice<br>(GOV1)           |             | Consultant<br>Dr.A.M.Mullin |             | Ward/Locati | on     |        |
| Results            | Documents                            | Demographics | ADTs IDs Audit    | Tree View        | Treatment Log           |           |                 |                                 |             |                             |             |             |        |        |
| Filter<br>Discip   | r By                                 | Selec        |                   | V Proces         | sed Range               | All 🔽     | Go              | Display Mode<br>Group By Report | C Ungroup   | By Report 🖲                 |             |             |        |        |
| 3 Reco             | ords Returned                        |              |                   |                  |                         |           |                 |                                 |             |                             |             |             |        |        |
| R                  | leport Id                            | Discipline   | Proces            | sed At           | Sample                  | Sar       | nple Collected  | Inve                            | stigation   | Date F                      | leported    | Notes       |        |        |
| R,02               | 2.0087145.Y                          | Haematolog   | y 20/01/201:      | 21:08:10         | Blood                   | 12/0      | 6/2002 11:00:00 | ) Elec                          | trolytes    | 11/06/20                    | 02 12:30:00 |             |        | la     |
| R,02               | 2.0087145.Y                          | Haematolog   | y 20/01/201:      | 21:08:10         | Blood                   | 12/0      | 6/2002 11:00:00 | ) Haemo                         | lytic Index | 11/06/20                    | 02 12:30:00 |             |        | la     |
| R,02               | 2.0087145.Y                          | Haematolog   | y 20/01/201       | 21:08:10         | Blood                   | 12/0      | 6/2002 11:00:00 | ) LI                            | PIDS        | 11/06/20                    | 02 12:30:00 |             |        | *      |

Display mode: Ungroup by report

# Find Results – Search results list

The search results grid on the 'Find Results' page now has an additional column added which uses the same mechanism described for the 'Homepage' tabs to indicate abnormality.

| Image: Sector   | 🖉 Find Result               | - Windows Internet Explorer                      |                          |              |               |               |                        |               |                                    |                                |                        |               | a 🗙    |
|---|-----------------------------|--|--------------------------|--------------|---------------|---------------|------------------------|---------------|------------------------------------|--------------------------------|------------------------|---------------|--------|
| By       By <t< td=""><td>00 - 6</td><td>http://pjssci6/StoreWeb/Restricted/</td><td>/Results/FindResult.asp:</td><td>×</td><td></td><td></td><td></td><td></td><td><b>~</b> <del>*</del><del>7</del></td><td>🗙 🚼 Google</td><td></td><td></td><td>. م</td></t<>  | 00 - 6                      | http://pjssci6/StoreWeb/Restricted/              | /Results/FindResult.asp: | ×            |               |               |                        |               | <b>~</b> <del>*</del> <del>7</del> | 🗙 🚼 Google                     |                        |               | . م    |
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| Requestor       Search       1234       Name       CHI       Report Id       Discipline       Processed AI       Sample       Investigation       Data<br>(All Sample)         Sample       Mark V BANCTEST       0206751222       B5900647       Biochemistry       10/11/2010       Biocd       Biocd       14/35/303       C         Sample       Mark V BANCTEST       0206751222       B5900647       Biochemistry       10/11/2010       Biocd       Biocd       12/06/2003       C       21/06/2003  | Report ID                   | equals 🔽   | 65 Records Return        | ied Reco     | irus Per Page | 20 VIEW All   |                        |               |                                    |                                |                        |               | _      |
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| Sample       MARY BANKTEST       020751222       6500064/Y       Blood       00000100       Blood       21/01/2003       21/01/2003       21/01/200   | Location                    | Search   | Name                     | СНІ          | Report Id     | Discipline    | Processed At           | Sample        | Collected                          | Investigation                  | Reported               | Notes         |        |
| Comments       From       To       Regerizer, intoscope   | Sample                      |  | MARY BANKTEST            | 0206751222   | BS900604Y     | Biochemistry  | 20:27:51               | Blood         |                                    | Blood                          | 14:52:00               | ٥             | *      |
| Prod       To       Phi/APEX       120982078       BS565765T       Biochemistry       16/11/2010       Biood       22/12/2001       Biood       12/06/2003       IX deve         Report       W       W       W       W       Biood       12/06/2003       Kidney       12/06/2003       Kidney       12/06/2003       IX deve       12/06/2003       IX deve </td <td>Comments</td> <td></td> <td>RogerApex<br/>NewPatient1</td> <td>1403523738</td> <td>BS087565T</td> <td>Biochemistry</td> <td>16/11/2010<br/>08:52:20</td> <td>Blood</td> <td>06/03/2001<br/>00:00:00</td> <td>Blood</td> <td>21/01/2003<br/>17:09:00</td> <td>۵</td> <td>*</td>  | Comments                    |  | RogerApex<br>NewPatient1 | 1403523738   | BS087565T     | Biochemistry  | 16/11/2010<br>08:52:20 | Blood         | 06/03/2001<br>00:00:00             | Blood                          | 21/01/2003<br>17:09:00 | ۵             | *      |
| Reported<br>Sample<br>Construct       Issue Sample<br>Sample<br>Construct       Issue Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sample<br>Sampl | Date                        | From To  | PhilAPEX<br>NewPatient4  | 1209882078   | BS565768T     | Biochemistry  | 16/11/2010<br>08:52:22 | Blood         | 26/12/2001<br>00:00:00             | Blood                          | 21/01/2003<br>17:09:00 | ۵             | *      |
| Collected<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bactevide<br>Bact   | Reported<br>Sample          |  | Lisa LabReport           | 2901778743   | BIO.00003R    | Biochemistry  | 18/11/2010             | Bone          | 12/06/2002                         | Kidney Tumour                  | 21/08/2008             |               | 44     |
| Received<br>Tested       1100000       1100000       110000       1  | Collected<br>Sample         |  | Eric LabReport           | 1805678743   | BIO.000031    | Biochemistry  | 18/11/2010             | Bone          | 12/06/2002                         | Bone Tissue & Kidney           | 01/09/2008             | 0             | -      |
| Testid       Image: Search       Lisa LabReport       2901778743       B10.00002       Biochemistry       1511648       Bone       11.00100       Tumour       14130100       Image: Vietable Vietab   | Received<br>Sample          |  | Carla LabReport          | 1910828786   | BIO 000031    | Biochemistry  | 18/11/2010             | Bone          | 12/06/2002                         | Bone Tissue & Kidney           | 02/09/2008             |               | -      |
| GP         Search         Liss Labkeport         2017/8/3         El.000002         Biochemistry         16:16:48         Bone         11:00:00         Tumour         14:30:00         U           GP Practice         Search         Carla Labkeport         190828768         Biochemistry         18/11/2010         Bone         11/206/2008         Bone Count         14/30:00         U         W           Ward/         Search         Eric Labkeport         190828768         Bio.000032         Biochemistry         18/11/2010         Bone         11/206/2008         Tissue         14/30:00         V           Lisa Labkeport         1900828768         Bio.000032         Biochemistry         18/11/2010         Bone         11/206/2008         Tissue         14/30:00         V           Lisa Labkeport         2901778743         Bio.000032         Biochemistry         18/11/2010         Bone         Carla Labkeport         19/08/2008         V         Search         11/00/2008         Tissue         14/30:00         V         V         11/11/2010         Bone Count & Kidney         19/07/2008         V         V         11/06/2003         Bone Count & Kidney         19/07/2008         V         11/06/2003         UE & LFT         24/11/2002         V         11/07/2000  | Tested                      |  | Line Lab Depart          | 0001770740   |               | Dischemister  | 16:16:48<br>18/11/2010 | Done          | 11:00:00<br>12/06/2002             | Tumour<br>Bone Tissue & Kidney | 14:30:00<br>02/09/2008 | -             |        |
| Or Practice   | GP<br>GP Practice           | Search   | Lisa Labkeport           | 2901//6/45   | BI0.000002    | biochemistry  | 16:16:48               | Bone          | 11:00:00                           | Tumour                         | 14:30:00               |               | 7      |
| Ward/<br>Location       Search       Enc LabReport       1805678743       B10.000032       Biochemistry       1811/2010       Bone       12/06/2012       Bione Court & Kidney       19/09/2008       I         Mappiral/<br>Site       Search       Carla LabReport       19/08/2018       Bio.000032       Biochemistry       1811/2010       Bone       12/06/2002       Bione Court & Kidney       19/09/2008       I         Discipline       Bochemistry       Select       Lia LabReport       2901778743       BIO.00003       Biochemistry       18/11/2010       Bone       12/06/2002       Bione Court & Kidney       19/09/2008       I       I       I       ISsue       19/09/2008       I       I       ISsue       19/09/2008       I       I       ISsue       19/09/2008       I       ISsue       19/09/2008       I       ISsue       19/09/2008       I       ISsue       ISsue       19/09/2008       I       ISsue       19/09/2008       ISsue       ISsue       19/09/2008       I       ISsue       19/09/2008       I       ISsue       19/09/2008       ISsue       ISsue       19/09/2008       ISsue       ISsue       ISsue       19/09/2008       ISsue       ISsue       ISsue       ISsue       ISsue       ISsue       ISsue <t< td=""><td>Consultant</td><td>Search</td><td>Carla LabReport</td><td>1910828786</td><td>BIO.000032R</td><td>Biochemistry</td><td>16:28:52</td><td>Bone</td><td>11:00:00</td><td>Bone Count</td><td>14:30:00</td><td></td><td>ha</td></t<>   | Consultant                  | Search   | Carla LabReport          | 1910828786   | BIO.000032R   | Biochemistry  | 16:28:52               | Bone          | 11:00:00                           | Bone Count                     | 14:30:00               |               | ha     |
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| Site  | Location<br>Hospital/       | Sawah  | Carla LabReport          | 1910828786   | BIO.000032    | Biochemistry  | 18/11/2010<br>16:16:49 | Bone          | 12/06/2002<br>11:00:00             | Bone Count & Kidney<br>Tissue  | 19/09/2008<br>14:30:00 | ۵             | 60     |
| Discipline       Building y       Select       MLAB COMMENTS       3144413056       B94457       Biochemistry       11/11/2010       Serum/plasma       24/11/2002       UE & LFT       24/11/2002       U & & LFT       00:00:00       U & & U & U & & U & & U & & U & & U & & U & U & U & & U & U & & U & & U & & U & & U & & U & & U & & U & U & U & & U &  | Site                        | Disabasista:                                     | Lisa LabReport           | 2901778743   | BIO.000003    | Biochemistry  | 18/11/2010<br>16:16:49 | Bone          | 12/06/2002<br>11:00:00             | Bone Count & Kidney<br>Tissue  | 19/09/2008<br>14:30:00 | ۵             | 10     |
| Trest       Search       CLARE JONES       0101735006       z2003270       Biochemistry       16/11/2010       Serum       20/02/2003       LIPIDS       20/02/2003       U       V         UCPN       GEMMA CLARKE       0705035026       z200377       Biochemistry       16/11/2010       Plasma       20/02/2003       Glucose       20/02/2003       U       V         UCPN       GEMMA CLARKE       0705035026       z200377       Biochemistry       16/11/2010       Plasma       20/02/2003       Glucose       20/02/2003       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       0000:000       000:000:00       000:00:00       000:00:00       000:00:00       000:00:00       000:00:00       00:00:000<   | Investigation               | Search Search                                    | MLAB COMMENTS            | 3144413056   | B844457       | Biochemistry  | 11/11/2010             | Serum/plasma  | 24/11/2002                         | UE & LFT                       | 24/11/2002             | 0             | *      |
| UCPN       GEMMA CLARKE       0705035026       z2003677       Biochemistry       11/19/301       Plasma       20/02/2003       Glucose       00/00/00       00/00/00         GEMMA CLARKE       0705035026       z2003677       Biochemistry       11/12/311       Plasma       20/02/2003       Glucose       00/00/00       0/00/00/00       0/0/0/0/00/00       0/0/0/0/00/00       0/0/0/0/0/00/00       0/0/0/0/0/0/0/00       0/0/0/0/0/0/0/0/0/0/0/0/0/0/0/0/0/0/0/   | Test                        | Search   | CLARE JONES              | 0101735006   | zz003677      | Biochemistry  | 16/11/2010             | Serum         | 20/02/2003                         | LIPIDS                         | 20/02/2003             | 0             | -      |
| GEMMA CLARKE       0705035026       22003677       Biochemistry       11:25:31       0:00:00:00       00:00:00 <td>UCPN</td> <td></td> <td>GEMMA CLARKE</td> <td>0705035026</td> <td>77003677</td> <td>Biochemistry</td> <td>16/11/2010</td> <td>Plasma</td> <td>20/02/2003</td> <td>Glucose</td> <td>20/02/2003</td> <td></td> <td>10</td>  | UCPN                        |  | GEMMA CLARKE             | 0705035026   | 77003677      | Biochemistry  | 16/11/2010             | Plasma        | 20/02/2003                         | Glucose                        | 20/02/2003             |               | 10     |
| AMASTERLA2       200307       Biochemistry       11:25:31       38:011       00:00:00       OBL & CT & LTPLOS       00:00:00       C         MASTERLA2       2309198104       22003677       Biochemistry       110:49:15       Plasma       20/02/2003       Glucose       20/02/2003       OU:00:00       C       00:00:00       C       00:00:00       00:00:00       C       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       00:00:00       0:00:00:00       00:00:00       0:00:00:00       11:4:3:20       00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       0:00:00:00       <   |                             |  |                          | 0705025026   | 77002677      | Rischamista   | 11:25:31<br>16/11/2010 | Sacura        | 00:00:00<br>20/02/2003             |                                | 20/02/2003             |               |        |
| TEST0200       2309199104       2200377       Biochemistry       10:49:15       Plasma       00:00:00       Clucose       00:00:00       00:00:00         MASTERLAB       2309199104       22003677       Biochemistry       10:49:15       Serum       00:00:00 <t< td=""><td></td><td></td><td>MASTERLAB</td><td>0703033020</td><td>22003077</td><td>biochemistry</td><td>11:25:31</td><td>Serum</td><td>00:00:00</td><td></td><td>00:00:00</td><td></td><td>2</td></t<>  |                             |  | MASTERLAB                | 0703033020   | 22003077      | biochemistry  | 11:25:31               | Serum         | 00:00:00                           |                                | 00:00:00               |               | 2      |
| Internet Rectars       2309193104       zz003577       Biochemistry       10,19+15       Serum       000,0000       USE & LFT & LIPLOS       000,0000       I         MINNE MOUSE       2104433003       BS011765T       Biochemistry       11/11/3012       Blood       000,0000       Blood       04/02/2003       I       4/02/2003       I       14/32,200       I       I       14/32,200       I <t< td=""><td></td><td></td><td>TEST0200</td><td>2309198104</td><td>zz003677</td><td>Biochemistry</td><td>10:49:15</td><td>Plasma</td><td>00:00:00</td><td>Glucose</td><td>00:00:00</td><td>U</td><td>ha</td></t<>   |                             |  | TEST0200                 | 2309198104   | zz003677      | Biochemistry  | 10:49:15               | Plasma        | 00:00:00                           | Glucose                        | 00:00:00               | U             | ha     |
| MINNIE MOUSE       2104433003       BS011765T       Biochemistry       11/11/2010       Blood       06/03/2003       Blood       04/03/2003       I       *         LisaApex       1901655067       BS069165T       Biochemistry       15/11/2010       Blood       12/03/2003       Blood       21/01/2003       I       *         NewPatient3       1901655067       BS069165T       Biochemistry       15/11/2010       Blood       12/03/2003       Blood       21/01/2003       *       *         Isobel TEST0111       C0628451       Biochemistry       11/11/2010       GLUCOSE       24/04/2003       Glucose tolerance test       24/04/2003       *       *         1234       Error on page.       Image: Company   |                             |  | TEST0200                 | 2309198104   | zz003677      | Biochemistry  | 10:49:15               | Serum         | 00:00:00                           | U&E & LFT & LIPIDS             | 00:00:00               |               | *      |
| LisaApex       1901655067       BS069165T       Biochemistry       15/11/2010<br>09:52:10       Blood       12/10/12003<br>00:00:00       Blood       21/01/2003<br>17/09:00       Image: Comparison of the second sec   |                             |  | MINNIE MOUSE             | 2104433003   | BS011765T     | Biochemistry  | 11/11/2010<br>14:13:32 | Blood         | 06/03/2003<br>00:00:00             | Blood                          | 04/03/2003<br>14:52:00 |               | *      |
| Isobel TEST0111       C0628451       Biochemistry       11/11/2010<br>16:33:55       GLUCOSE       24/04/2003<br>09:25:00       Glucose tolerance test       24/04/2003<br>00:00:00       Image: Compage <ul> <li> </li> <li> </li></ul> <li> <li> <li> <ul> <li> </li> <li> </li></ul> <li> <ul> <li> </li></ul> <li> <ul> <li> </li></ul> <li> <li> <ul> <li> </li></ul>       &lt;</li></li></li></li></li></li></li>  |                             |  | LisaApex<br>NewPatient3  | 1901655067   | BS069165T     | Biochemistry  | 16/11/2010<br>08:52:21 | Blood         | 12/03/2003<br>00:00:00             | Blood                          | 21/01/2003<br>17:09:00 |               | 190    |
| 1234         000000         000000           ▲ Error on page.         Image: Company Comp   |                             |  | Isobel TEST0111          |              | C0628451      | Biochemistry  | 11/11/2010             | GLUCOSE       | 24/04/2003                         | Glucose tolerance test         | 24/04/2003             |               | 19     |
| 8 Error on page.       Image  |                             |  | 1 <u>234</u>             |              |               |               | 10.00.00               |               | 00.20.00                           |                                | 00.00.00               |               |        |
| 🚴 Error on page.  |                             |  |                          |              |               |               |                        |               |                                    |                                |                        |               |        |
| 🛕 Error on page.  |                             |  |                          |              |               |               |                        |               |                                    |                                |                        |               |        |
|   | 🔝 Error on page.            |  |                          |              |               |               |                        |               |                                    | 🗔 😜 Internet                   |                        | <b>a</b> 100% | • ,    |

#### Additional information

The Recently Viewed Results tab contains details of results viewed via a Remote Search Provider; it will only be able to display the correct normalcy flag for those returned from Version 6.0. Earlier versions of the Search Providers do not support the normalcy changes.

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# 5.6 SCI Gateway Recipient Web Service Style sheets

#### Overview

SCI Store Recipient Web Services receives document and patient related messages (E.g., referral or discharge XML) from SCI Gateway and passes them to the SCI Store document upload windows directory. The messages are then processed by the SCI Store Clinical Documents Upload service and fed into SCI Store.

#### Pre-existing Recipient Web Service - Version 1.0

Recipient Web Services Version 1.0 searches for a stylesheet to associate with a message received from SCI Gateway. If no stylesheet is found then the document upload process will raise an exception and this document will fail to be uploaded into SCI Store.

# **New Recipient Web Service - Version 2.0**

Recipient Web Service Version 2.0 allows SCI Gateway to provide a Stylesheet GUID with the message to be processed by the document upload service. This stylesheet GUID identifies the correct stylesheet to be used when displaying the document that has been uploaded from Gateway

# **GUID Stylesheet Association Maintenance**

From the main menu Select "General" > "GUID Stylesheet Association Maintenance"

| SC SC      | I Store Pa      | aisley         |                         |                 |                            |          |     | My Settir      | igs      | About Store       | Log Out |
|------------|-----------------|----------------|-------------------------|-----------------|----------------------------|----------|-----|----------------|----------|-------------------|---------|
| Home       | Find Patient    | Find Result    | Find Document           | Find Treatm     | ent Log                    |          |     | P              | atient 1 | ID:               | Go      |
|            | Confi           | iguration      | Exceptions Mgmt         | Security        | Maintenance                | Report   | ing | General        | Noti     | fications         |         |
| Home       |                 |                |                         |                 |                            |          |     | System Settir  | ngs      |                   |         |
| CLast A    | CCASE Summa     | 20/            |                         |                 |                            |          |     | Remote Data    | Source   | es                |         |
| Last       | CCC35 Dumm      | ur y           |                         |                 |                            |          |     | Cumulative S   | ources   |                   |         |
| Last log   | jin Jan 21 2011 | 10:29AM. You   | accessed 2 patient(s    | ). There have   | been <b>0</b> invalid logi | n attemp |     | Breakglass M   | aintena  | ance              |         |
| If this in | nformation doe: | s not match yo | ur recent activity plea | ase refer to yo | our local security po      | olicy.   |     | Job Type Mair  | ntenan   | ce                |         |
|            |                 |                |                         |                 |                            |          |     | Login Reason   | Mainte   | nance             |         |
| Recently   | Viewed Rece     | ntly Created F | Recently Requested M    | ly Favourites   | Administration             |          |     | Scheme Code    | e Maint  | enance            |         |
| Interfa    | ace Managemer   | nt             |                         |                 |                            |          |     | Scheme Mapp    | ping Ma  | intenance         |         |
| Click H    | ere To Check C  | CHI Webservice | e Availability          |                 |                            |          |     | Scheme Grou    | iping M  | aintenance        |         |
| ∫Sho       | w By Status     |                |                         |                 |                            |          |     | Report Profile | es       |                   |         |
| • • •      |                 | f              |                         |                 |                            |          |     | GUID Stylesh   | eet As:  | sociation Mainter | nance   |
|            |                 |                |                         |                 |                            |          |     |                |          |                   |         |
| No Da      | ata To Display  |                |                         |                 |                            |          |     |                |          |                   |         |
|            |                 |                |                         |                 |                            |          |     |                |          |                   |         |

# Associate a GUID to a Stylesheet

From the GUID Stylesheet Association Maintenance Screen, select the "+" (Add) button from the toolbar.

| SCI                      | Store Paisley  | Y                    |                 |           |          |             |           |         | My Settings   | About Store   | Log O    |
|--------------------------|--|----------------------|-----------------|-----------|----------|-------------|-----------|---------|---------------|---------------|----------|
| me                       | Find Patient Find F                                    | Result Find Do       | ocument Find 1  | Freatment | t Log    |             |           |         | Patie         | ent ID:       |          |
|                          |  | Configuration        | Exceptions      | Mgmt      | Security | Maintenance | Reporting | General | Notifications |               |          |
| me > Gl                  | JID Stylesheet Associ                                  | iation Maintenanc    | e               |           |          |             |           |         |               | User: admin o | on PJSSC |
| ( I                      |  |                      |                 |           |          |             |           |         |               |               |          |
| aintain                  | GUID Stylesheet A                                      | ssociation           |                 |           |          |             |           |         |               |               |          |
| a   🕂<br>aintain<br>GUID | GUID Stylesheet A<br>Stylesheet                        | ssociation<br>Date o | f Association 🔻 |           | _        |             |           |         |               |               |          |
| aintain<br>GUID<br>2727  | GUID Stylesheet A<br>Stylesheet<br>gateway-discharge-v | Date o               | f Association V | 0         | _        |             |           |         |               |               |          |

# Search for and select GUID

Click the "Search" hyperlink next to the GUID input field:

| SC:      | I Store P     | aisley            |               |                     |             |             |           |         | My Settings   | About Store | Log Out    |
|----------|---------------|-------------------|---------------|---------------------|-------------|-------------|-----------|---------|---------------|-------------|------------|
| Home     | Find Patient  | Find Result       | Find Docum    | nent Find Treatme   | nt Log      |             |           |         | Patie         | ent ID:     | Go         |
|          |               | Config            | uration       | Exceptions Mgmt     | Security    | Maintenance | Reporting | General | Notifications |             |            |
| Home > 0 | GUID Styleshe | et Association Ma | intenance > / | Add GUID Stylesheet | Association |             |           |         |               | User: admin | on PJSSCI6 |
| ¢        |               |                   |               |                     |             |             |           |         |               |             |            |
| Add GU   | ID Styleshee  | t Association     |               |                     |             |             |           |         |               |             |            |
| GUID *   | [             |                   |               | Search              |             |             |           |         |               |             |            |
| Stylesh  | eet *         |                   |               | Search              |             |             |           |         |               |             |            |

Select a GUID from the list and click the select button.

| Sc Sc   | I Stor     | e Pa   | isley         |               |          |             |                 |        | My Sett | ings | About Store | Log Out    |
|---------|------------|--------|---------------|---------------|----------|-------------|-----------------|--------|---------|------|-------------|------------|
|         |            |        |               |               |          |             |                 |        |         |      | t ID:       | Go         |
|         |            |        |               |               | Mgmt     |             | Maintenance     |        |         |      | tifications |            |
| Home >  | GUID Style | esheet | : Association | Maintenance : | > Add GU | ID Styleshe | eet Association |        |         |      | User: admin | on PJSSCI6 |
|         |            |        |               |               |          |             |                 |        |         |      |             |            |
|         |            |        |               |               |          |             |                 |        |         |      |             |            |
| Add G   | JID Styles | sheet  | Associatio    | n             |          |             |                 |        |         |      |             |            |
|         |            |        |               |               |          |             |                 |        |         |      |             |            |
| GUID *  |            |        |               | Search GUI    | Ds to be | associate   | d               |        | ×       |      |             |            |
| Stylesh | neet *     |        |               | GUID          |          |             |                 | Search | Selec 📤 |      |             |            |
|         |            |        |               | 2323          |          |             |                 |        | ^       |      |             |            |
|         |            |        |               | 2424          |          |             |                 |        |         |      |             |            |
|         |            |        |               | 2626          |          |             |                 |        |         |      |             |            |
|         |            |        |               | 272722        |          |             |                 |        |         |      |             |            |
|         |            |        |               | 31232         |          |             |                 |        |         |      |             |            |
|         |            |        |               | \$            |          |             |                 |        | >       |      |             |            |
|         |            |        |               |               |          |             |                 |        |         |      |             |            |
|         |            |        |               |               |          |             |                 |        |         |      |             |            |

#### Search for and select an associated Stylesheet

Clicking the "Search" hyperlink will initiate a search for stylesheets that exists in the folder that has been defined in the "DocumentStylesheetLocation" system setting. To associate a Stylesheet GUID to its appropriate stylesheet this folder needs to have already been populated with the stylesheet.

Click the "Search" hyperlink next to the Stylesheet input field:

| SC SC    | I Store P      | aisley          |                    |                        |          |             |           |         | My :          | Settings | About Store | Log Out    |
|----------|----------------|-----------------|--------------------|------------------------|----------|-------------|-----------|---------|---------------|----------|-------------|------------|
| Home     | Find Patient   | Find Result     | Find Document      | Find Treatment Log     |          |             |           |         |               | Pati     | ent ID:     | Go         |
|          |                |                 | Configuration      | Exceptions Mgmt        | Security | Maintenance | Reporting | General | Notifications |          |             |            |
| Home > 0 | GUID Styleshee | t Association M | aintenance > Add G | UID Stylesheet Associa | tion     |             |           |         |               |          | User: admin | on PJSSCI6 |
| æ   🔒    |                |                 |                    |                        |          |             |           |         |               |          |             |            |
| Add GU   | ID Styleshee   | t Association   |                    |                        |          |             |           |         |               |          |             |            |
| GUID *   | 2              | 525             |                    | Clear                  |          |             |           |         |               |          |             |            |
| Stylesh  | eet *          |                 |                    | Search                 |          |             |           |         |               |          |             |            |

Select a stylesheet from the list and click the select button.

| Home Find Patient Find Result Find Document Find Treatment Log Configuration Exceptions Mgmt Security Maintenance Reporting General Notifications Home > GUID Stylesheet Association Maintenance > Add GUID Stylesheet Association | Patient ID:      | on PJSSCI6 |
|--|------------------|------------|
| Configuration Exceptions Mgmt Security Maintenance Reporting General Notification<br>Home > GUID Stylesheet Association Maintenance > Add GUID Stylesheet Association  | :<br>User: admin | on PJSSCI6 |
| Home > GUID Stylesheet Association Maintenance > Add GUID Stylesheet Association   | User: admin      | on PJSSCI6 |
|  |                  |            |
|  |                  |            |
| Add GUID Stylesheet Association Search Stylesheets   |                  |            |
| GUID * 2525 C Stylesheet Search Select   |                  |            |
| Stylesheet Ste clinical-letter-v1-1.xsl  |                  |            |
| clinical-letter.xsi<br>gateway-discharge-21.xsi  |                  |            |
| gateway-discharge-v2-6 xal   |                  |            |
| gateway-discharge-xz-xsi   |                  |            |
| gateway-dischargeEDIS.xsl  |                  |            |
| galeway-refer rai-rz-o.xsi   |                  |            |
|  |                  |            |



| SC:      | I Store Pa     | aisley            |                    |                        |          |             |           |         | My Se         | ittings | About Store | Log Out    |
|----------|----------------|-------------------|--------------------|------------------------|----------|-------------|-----------|---------|---------------|---------|-------------|------------|
| Home     | Find Patient   | Find Result       | Find Document      | Find Treatment Log     |          |             |           |         |               | Patier  | nt ID:      | Go         |
|          |                |                   | Configuration      | Exceptions Mgmt        | Security | Maintenance | Reporting | General | Notifications |         |             |            |
| Home > 0 | GUID Styleshee | t Association M   | aintenance > Add G | UID Stylesheet Associa | tion     |             |           |         |               |         | User: admin | on PJSSCI6 |
| ¢   🛃    |                |                   |                    |                        |          |             |           |         |               |         |             |            |
| Add GU   | ID Stylesheet  | t Association     |                    |                        |          |             |           |         |               |         |             |            |
| GUID *   | 25             | 25                |                    | Clear                  |          |             |           |         |               |         |             |            |
| Stylesh  | eet * ga       | iteway-discharge- | v2-7.xsl           | Clear                  |          |             |           |         |               |         |             |            |

The new association is shown on the maintenance screen.

| SCI SCI  | Store Pa        | isley          |                 |                    |          |             |           |         | My Set        | tings A   | bout Store   | Log O    |
|----------|-----------------|----------------|-----------------|--------------------|----------|-------------|-----------|---------|---------------|-----------|--------------|----------|
| Home     | Find Patient    | Find Result    | Find Document   | Find Treatment Log |          |             |           |         |               | Patient I | D:           |          |
|          |                 |                | Configuration   | Exceptions Mgmt    | Security | Maintenance | Reporting | General | Notifications |           |              |          |
| Home > G | GUID Stylesheet | Association Ma | aintenance      |                    |          |             |           |         |               | U         | ser: admin o | on PJSSC |
| ⇔  +     |                 |                |                 |                    |          |             |           |         |               |           |              |          |
| Maintai  | n GUID Styles   | heet Associal  | tion            |                    |          |             |           |         |               |           |              |          |
| GUID     | Style           | esheet         | Date of Associa | tion 🔻             |          |             |           |         |               |           |              |          |
| 2525     | gateway-disc    | harge-v2-7.xsl | 31/01/2011      | <b>Q</b>           |          |             |           |         |               |           |              |          |
| 2727     | gateway-disc    | harge-v2-6.xsl | 28/01/2011      | 9                  |          |             |           |         |               |           |              |          |
| 344232   | 2 gateway-disc  | harge-v2-7.xsl | 28/01/2011      | 0                  |          |             |           |         |               |           |              |          |
|          |                 |                |                 |                    |          |             |           |         |               |           |              |          |

## End User: Error message: "Document cannot be seen"

Although a document with a GUID has been uploaded, if there is no stylesheet association it will not be possible to view the document in the Web Application. In this case, the following message will be displayed to the end user.



This error may be shown to an end user for sites using Recipient Web Service 2.0 only

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# 5.7 Unique Record Identifier Matching

## Overview

Patient Matching in SCI Store has now been extended to allow the use of a record identifier within the patient matching rules. This capability is relevant when there is not enough demographic information supplied to match on a patient.

Demographic information may be unavailable because the patient wishes to remain anonymous or is unconscious. Using the record identifier (RID) as a matching rule will mean that in this scenario updated records will match against the original record and no duplicates will be created.

Depending on the type of data being sent, the record identifier could be:

- Report Identifier
- Document Identifier
- Treatment Log Identifier
- ADT Identifier

An example of a use for this new matching rule might be when a patient has been admitted to an accident and emergency department and is unconscious. Their treatment, results and admission are raised against a temporary patient and processed into SCI Store. Later when the patient regains consciousness they give full details which are updated in the system. This should trigger a demographics update against the original record that would ensure that the correct demographics are associated with the records.

# **Patient Matching Rules**

The diagram below shows example patient matching rules one of which is an RID rule.

| SCI Stor          | re Paisley             |                    |                          |                   |               |         | My Settings | About Store   | Log Ou   |
|-------------------|------------------------|--------------------|--------------------------|-------------------|---------------|---------|-------------|---------------|----------|
| Home Find Pa      | tient Find Result      | Find Document      | Find Treatment Log       |                   |               |         | Patient     | ID:           | G        |
|                   | Configura              | tion Exceptio      | ns Mgmt Security         | Maintenance       | Reporting     | General | Notificatio | ıs            |          |
| Home > Local Pati | ient Matching > Ame    | end Matching Rules |                          |                   |               |         | User:       | admin on serv | er PJSS( |
| ¢                 |                        |                    |                          |                   |               |         |             |               |          |
| Patient Match     | Group                  |                    |                          |                   |               |         |             |               |          |
| Name<br>BID Match |                        |                    |                          |                   |               |         |             |               |          |
|                   |                        |                    |                          |                   |               |         |             |               |          |
| Patient Match     | Group Status           |                    |                          |                   |               |         |             |               |          |
| ● Active O Ina    | active                 |                    |                          |                   |               |         |             |               |          |
|                   |                        |                    |                          |                   |               |         |             |               |          |
| Amend Patient     | Match Algorithm        |                    |                          |                   |               |         |             |               |          |
| Patient Match     | Criteria               | Patient Action     | CHI PAS Sur For I        | ni Dob Sex Add    | cd Src C/Q    | RID     |             |               |          |
| CHI Number        | No Match 💙             | Insert             |                          | -   -   -   -     | -   -   -     | Add     |             |               |          |
| PAS / CRN         |                        | O Update           | <u>x</u>                 |                   |               | Remov   | e           |               |          |
| European I        | No Match 💌             | C Add Alias        |                          | -   -   -   -     | -   -   -   - |         |             |               |          |
| Sumane            | V No Match V           | C Exception        |                          |                   |               | *       |             |               |          |
| Forename          | No Match 💙             | O No Action        |                          |                   |               |         |             |               |          |
| First Initial     | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| Date of Birth     | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| Sex               | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| Address           | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| Postcode          | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| Source System     | No Match 🗸             |                    |                          |                   |               |         |             |               |          |
| CHI               | No Match 👻             |                    |                          |                   |               |         |             |               |          |
| Record Identifie  | er Match 🗸             | $\supset$          |                          |                   |               |         |             |               |          |
|                   | landatory field indice |                    | Populate missing CHI pu  | mbers from web se | nvice?        |         |             |               |          |
|                   | anadory nela India     |                    | , operate massing chi ne | meers nom web se  |               |         |             |               |          |
| ID Format         |                        |                    |                          |                   |               |         |             |               |          |
| Valid ID Form     | at                     |                    | Eor                      | mat Help          |               |         |             |               |          |

If a specific matching rule contains the record identifier then it cannot contain any other matching criteria.

# Additional Information

This feature should only be used for systems where the record identifier is unique for the specific source of information.

The record identifier used for matching purposes will be dependent on the type of data being sent into SCI Store, (e.g. lab results will use the Report Identifier, documents will use the Document Identifier, etc).

This rule is intended for use with interfaces that cannot always provide enough demographic information to identify the patient. It is envisioned that a typical set of matching rules for this scenario would firstly try and match against specific patient demographics, with the final rule being a match against the record identifier only.

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# 5.8 Remote Data Source Administration

# Overview

There have been significant changes to how remote data sources (formerly "StoreToStore") are administered. A remote profile sets the remote data source configuration so that there is a mechanism for creating "Remote Data Source profile" that can be attached to group permission or individual user or a role. Remote Profiles allows centrally controlled permission across remote data sources to allow access to the different Store Web Services.

#### **Remote Data Source Profile Maintenance**

The Remote Data Source Profile Maintenance defines which particular Remote Data Sources will be used by a user when they access the Store Web Services. On selecting the Security menu and then selecting the **Remote Data Source Profile Maintenance** menu, the following screen is displayed when clicking the 'Search' button.

| SC SC              | I Store Pa  | aisley      |                |                    |          |             |           |         | My Set        | ttings About S | Store Log Out |
|--------------------|---|-------------|----------------|--------------------|----------|-------------|-----------|---------|---------------|----------------|---------------|
| Home               | Find Patient  | Find Result | Find Document  | Find Treatment Log |          |             |           |         |               | Patient ID:    | Go            |
|                    |   |             | Configuration  | Exceptions Mgmt    | Security | Maintenance | Reporting | General | Notifications |                |               |
| Home > F           | ome > Remote Data Source Profile Maintenance User: admin on PJSSCI6 |             |                |                    |          |             |           |         |               |                |               |
| ⇔   +              |   |             |                |                    |          |             |           |         |               |                |               |
|                    |   |             |                |                    |          |             |           |         |               |                |               |
| Add/Sea<br>profile | arch for a remot  | e Search C  | lear 5 Records | Returned           |          |             |           |         |               |                |               |
| Profile            |   |             |                |                    | Profi    | le Name     |           |         |               | Status         |               |
| Name               |   |             | CHIDSAc        | cess               |          |             |           |         | True          |                |               |
|                    |   |             | DSTestpla      | an15               |          |             |           |         | True          |                |               |
|                    |   |             | DSTestpla      | an3                |          |             |           |         | True          |                |               |
|                    |   |             | LocalDSA       | ccess              |          |             |           |         | True          |                |               |
|                    |   |             | TestDSAc       | cess               |          |             |           |         | True          |                |               |
|                    |   |             |                |                    |          |             |           |         |               |                |               |

Alternatively, enter the profile name for the criteria in order to return a sub-set of remote profiles.

Selecting the appropriate remote profiles will then display a list of available remote data sources (See screen capture below). The admin user can determine what data sources the remote profile will contain by using the radio buttons:

- Not Allowed Access
- Allowed Access

| r sc    | I Store Pa       | aisley           |                     |                           |              |             |           |         |              | My Settings | About Store | Log Ou   |
|---------|------------------|------------------|---------------------|---------------------------|--------------|-------------|-----------|---------|--------------|-------------|-------------|----------|
| lome    | Find Patient     | Find Result      | Find Document       | Find Treatment Log        |              |             |           |         |              | Pati        | ent ID:     | G        |
|         |                  |                  | Configuration       | Exceptions Mgmt           | Security     | Maintenance | Reporting | General | Notification | IS          |             |          |
| ome > i | Remote Data So   | ource Profile Ma | aintenance > Add Re | emote Data Source Profile | •            |             |           |         |              |             | User: admin | on PJSSC |
| ⇔   ×   |                  |                  |                     |                           |              |             |           |         |              |             |             |          |
| Remo    | te Data Sourc    | ce Profile       |                     |                           |              |             |           |         |              |             |             |          |
| Profile | Name * CHIDSA    | ccess            |                     |                           |              |             |           |         |              |             |             |          |
| Profile | Status 🔎 Acti    | ve C Inactive    |                     |                           |              |             |           |         |              |             |             |          |
|         |                  |                  |                     |                           |              |             |           | _       |              |             |             |          |
| Access  | Permission fo    | or listed Rem    | ote Data Sources    |                           |              |             |           |         |              |             |             |          |
| 10 Red  | cords Returned   |                  |                     |                           |              |             |           |         |              |             |             |          |
|         | Site Name        | Se               | nvice Name          |                           | Allowed Ac   | - CASS      |           |         |              |             |             |          |
|         | CHI              |                  | chiweb              | O Not Allowed Access      | Allowed Acce | 155         |           |         |              |             |             |          |
|         | Local 2.3        |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         | Local 4.1        |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         | Local 6.0        |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         | Invalid          |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
| r       | nunit secure 2.3 |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
| r       | nunit secure 4.1 |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
| r       | nunit secure 6.0 |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         | Test 4.1         |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         | Test 6.0         |                  | StoreWS             | • Not Allowed Access      | Allowed Acce | ess         |           |         |              |             |             |          |
|         |                  |                  |                     |                           |              |             |           |         |              |             |             |          |

# Adding a new remote profile

Procedure: To add a new Remote Profile...

 Click on button on the Remote Data Source Profile Maintenance screen. The following screen will be displayed

| ie Find Pai   | tient   | Find Result    | Find Document   | Find Treatment Log   |  |   |           |       |
|---|---|----------------|---|--|--|---|-----------|-------|
| Concerning to the second  |   |                | Configuration   | Exceptions Mgmt  | Security   | Maintenance   | Reporting | Gener |
| e > Remote D  | ata So  | urce Profile M | aintenance > Add I  | Remote Data Source Prof  | file   |   |           |       |
|   |   |                |   |  |  |   |           |       |
| emote Data  | Sour  | ce Profile—    |   |  |  |   |           | ī     |
| file Name *   |   |                |   |  |  |   |           |       |
| ofile Status  | Activ   | e OInactive    |   |  |  |   |           |       |
|   |   |                |   |  |  |   |           | 1     |
| ess Permiss   | sion fo   | r listed Rem   | ote Data Source   | 5  |  |   |           |       |
|   |   |                |   |  |  |   |           |       |
|   |   |                |   |  |  |   | _         |       |
| Records Retu  | urned   |                |   |  |  |   |           |       |
| Records Retu<br>Site Na   | urned   | Se             | rvice Name  |  | Allowed A  | ccess   |           | 2     |
| Records Retu<br>Site Na<br>CHI  | urned<br>ame  | Se             | rvice Name<br>chiweb  | ⊙Not Allowed Access  | Allowed Acce   | ccess<br>ass  |           | 2     |
| Records Retu<br>Site Na<br>CHI<br>Local 2   | urned<br>ime  | Se             | rvice Name<br>chiweb<br>StoreWS   | Not Allowed Access     ONot Allowed Access   | Allowed Acce<br>OAllowed Acce  | ccess<br>385  |           |       |
| Records Reti<br>Site Na<br>CHI<br>Local 2<br>Local 4  | urned<br>me<br>2.3<br>4.1   | Se             | rvice Name<br>chiweb<br>StoreWS<br>StoreWS  | Not Allowed Access     Onot Allowed Access     Onot Allowed Access     Onot Allowed Access   | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce   | CCESS<br>2555<br>2555   |           |       |
| Records Retr<br>Site Na<br>CHI<br>Local 2<br>Local 4<br>Local 6   | urned<br>ame<br>2.3<br>4.1<br>6.0                                 | Se             | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS   | Not Allowed Access   | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce   | CC <b>ESS</b><br>955<br>955<br>955                            |           |       |
| Records Retu<br>Site Na<br>CHI<br>Local 2<br>Local 4<br>Local 6<br>Inval  | urned<br>2.3<br>4.1<br>6.0  | Se             | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS                                  | Not Allowed Access C<br>Not Allowed Access C<br>Not Allowed Access C<br>Not Allowed Access C<br>Not Allowed Access C   | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce   | CCESS<br>955<br>955<br>955<br>955<br>955                      |           |       |
| Records Reta<br>Site Na<br>CHI<br>Local 2<br>Local 4<br>Local 4<br>Inval  | urned<br>ame<br>2.3<br>4.1<br>6.0<br>id<br>ure 2.3                | Se             | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS                       | Not Allowed Access C<br>Not Allowed Access C   | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce                                 | CCESS<br>955<br>955<br>955<br>955<br>955<br>955               |           |       |
| Records Retu<br>Site Na<br>CHI<br>Local 2<br>Local 4<br>Local 6<br>Invali<br>nunit secu<br>nunit secu             | urned<br>2.3<br>4.1<br>6.0<br>id<br>ure 2.3<br>ure 4.1            | Se             | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS            | Not Allowed Access C<br>Not Allowed Access C   | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce                 | CCCESS<br>1955<br>1955<br>1955<br>1955<br>1955<br>1955        |           |       |
| Records Ret<br>Site Nd<br>CHI<br>Local 2<br>Local 4<br>Local 6<br>Inval<br>nunit secu<br>nunit secu<br>nunit secu | urned<br>2.3<br>4.1<br>6.0<br>id<br>ure 2.3<br>ure 4.1<br>ure 6.0 | Se<br>         | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS            | Not Allowed Access Not Allowed | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce                 | ccess<br>255<br>255<br>255<br>255<br>255<br>255<br>255<br>255 |           |       |
| Records Ret<br>Site Na<br>CHI<br>Local 2<br>Local 4<br>Local 6<br>Inval<br>nunit secu<br>nunit secu<br>nunit secu | urned<br>2.3<br>4.1<br>6.0<br>id<br>ure 2.3<br>ure 4.1<br>ure 6.0 | Se<br>         | rvice Name<br>chiweb<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS<br>StoreWS | Not Allowed Access Not Allowed | Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce<br>Allowed Acce | CCESS<br>355<br>555<br>555<br>555<br>555<br>555<br>555<br>555 |           |       |

- Enter Profile Name
- Select if the profile is **Active** or **Inactive** by using the "profile status" radio buttons.
- To apply a Web Service against the remote profile, click "Allowed Access" radio button and to remove the Web Service against the remote profile click on "Not

Allowed Access" radio button. Click 🛃 Save to apply the change.

- Then click on leave to Exit and go back to the Find Remote Profiles Screen.
- To delete a Remote Profile click on the X Delete icon.

Home > Remote Data Source Profile Maintenance > Add Remote Data Source Profile

| –Remote Dai    | ta Source Profile ———— |  |
|----------------|------------------------|--|
| Profile Name * | * DSTestplan15         |  |
| Profile Status | ●Active ○Inactive      |  |

Access Permission for listed Remote Data Sources 10 Records Returned Site Name Service Name Allowed Access CHI chiweb ONot Allowed Access 💿 Allowed Access Local 2.3 StoreWS Not Allowed Access OAllowed Access Local 4.1 StoreWS Not Allowed Access OAllowed Access ●Not Allowed Access ○Allowed Access Local 6.0 StoreWS Invalid StoreWS ONot Allowed Access 💿 Allowed Access nunit secure 2.3 StoreWS Not Allowed Access OAllowed Access nunit secure 4.1 StoreWS Not Allowed Access OAllowed Access nunit secure 6.0 StoreWS Not Allowed Access OAllowed Access StoreWS ONot Allowed Access OAllowed Access Test 4.1 Test 6.0 StoreWS ONot Allowed Access OAllowed Access

There are certain conditions under which a Remote Profile may not be deleted.

- The Remote Profile is currently assigned to a user or users.
- The Remote Profile is currently assigned to a group or groups.
- The Remote Profile is currently assigned to a role or roles.

# Adding a Remote Profile to a User

Valid remote profiles can be added to a user from the "Account Details" section of the "User Maintenance Screen". See screen capture below.

| SCI Store Paisl  | ey                      |                                   |                   |                                   |            | My Se   | ttings About Store   |
|--|-------------------------|-----------------------------------|-------------------|-----------------------------------|------------|---|----------------------|
| Home Find Patient Fir  | nd Result Find Document | Find Treatment Log                |                   |                                   |            |   | Patient ID:          |
|  | Configu                 | ration Exceptions Mgmt            | Security Mainten  | ance Reporting                    | j General  | Notifications   |                      |
| Home > Users > User Mainter  | nance                   |                                   |                   |                                   |            |   | User: admin on serve |
| 🗢   🗙 🛃   🔂  |                         |                                   |                   |                                   |            |   | Actions Select Act   |
| User Details   |                         |                                   |                   |                                   |            |   |                      |
| User Name *  | admin                   | Friendly Name                     | The Global Admin  |                                   |            |   |                      |
| Title  | Dr                      | Forename *                        | Global            | Sum                               | ame *      | Admin   |                      |
| Base Location *  | Local Store             | <ul> <li>Email Address</li> </ul> | admin@atos.com    | Cont                              | act Number | 0800 SCI Help   |                      |
| User Type  | Local                   | <ul> <li>Job Type</li> </ul>      | Not specified     | ✓ Sour                            | ce System  |   |                      |
|  |                         |                                   |                   |                                   |            |   |                      |
| Account Details  |                         |                                   |                   |                                   |            |   |                      |
| Account Status *   | Active 🗸                | Valid From                        | 01/01/1988        | <ul> <li>Valid To</li> </ul>      |            | ~   |                      |
| Default Patient View   | Results 💙               | User Session Timeout (mins)       |                   | Administrator                     | Туре       | Gi aal 💙  |                      |
| Display Template   | Default Template 💙      | Time Access Template              | Not specified     | <ul> <li>Remote Profil</li> </ul> | es         | LocalDSAccess   |                      |
| Publish Contact Details  | 🗆 Enforce Login Reason  | 🗆 User must change passwo         | ord at next login |                                   | (          | Select Profile<br>LocaIDSAccess<br>CHIDSAccess<br>DSTestplan15<br>TestDSAccess<br>DSTestplan3 |                      |
|  |                         |                                   |                   |                                   |            |   |                      |
|  |                         |                                   |                   |                                   |            |   |                      |
| Permission Groups  |                         |                                   |                   |                                   |            |   |                      |
| Available Permission G<br>ECSGPAdmin<br>ECSOut0 Hours<br>HideDOBandFemale<br>HideHSDocs<br>HideRadiology | roups                   | Selected Permission Gro           | ups               |                                   |            |   |                      |
| UnivGPMargaretAnderson   | <                       |                                   |                   |                                   |            |   |                      |

### Adding a remote profile to a permission group

Select the remote profile from the "Remote profile permissions" field set (See screen capture below). Only active remote profiles will be shown in this list.

| > 🗙 🛃   |                                 |                  |             |
|---|---------------------------------|------------------|-------------|
| Permission Group De<br>Permission Group Na<br>TP15RemoteProfile   | etails<br>me                    |                  |             |
| Remote Profile Perm   | issions                         |                  |             |
| Remote Pro  | file Name                       |                  |             |
| DSTectolan15  |                                 |                  |             |
| Dorestpianto  |                                 | >                |             |
| - Security Permission<br>Module Permissions   | 5<br>View Permissions           | >                |             |
| - Security Permission<br>Module Permissions<br>Available Data Restri  | S<br>View Permissions           | Selected Data Re | estrictions |
| - Security Permission<br>Module Permissions<br>Available Data Restri<br>HideAllDoB  | S<br>View Permissions<br>ctions | Selected Data Re | estrictions |
| Security Permission<br>Module Permissions<br>Available Data Restri<br>HideAllDoB<br>HideCRN   | S<br>View Permissions<br>ctions | Selected Data Re | estrictions |
| - Security Permission<br>Module Permissions<br>Available Data Restri<br>HideAllDoB<br>HideCRN<br>HideDoBonPatientMaster<br>HideFomaleDationte | S<br>View Permissions<br>ctions | Selected Data Re | estrictions |
| Security Permissions     Module Permissions     Available Data Restri     HideAllDoB     HideCRN     HideDoBonPatientMaster                   | S<br>View Permissions<br>ctions | Selected Data Re | estrictions |

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# 5.9 Miscellaneous other New Functionality / Resolved Issues

| Build    | Feature              | Description  |
|----------|----------------------|--|
| 7.0.1102 | New<br>Functionality | A new 'GetCumulativeReport' web service method has been added to the Version 6.0 web services              |
| 7.0.1102 | Resolved<br>Issue    | Tracker 7743 - Automerge Process Incorrectly Allows Patients<br>With Different Consent Values to be Merged |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8118 – Retire Document Error when PackageID > 30 characters  |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8324 - Organisation Appearing More Than Once In View Permissions                                   |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8378 - Treatment Log - TRClinicalCodeSelectedTerm Column Size Issue                                |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8396 - Treatment Log Assessed Urgency Reason Issue   |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8306 - 'Error Occurring' When Performing Manual Match  |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8113 - Performance Issue When Viewing Admin Tab -<br>Query Timeout                                 |
| 7.0.1102 | Resolved<br>Issue    | Tracker 8327 - Duplicate Results Data Being Returned in WS Version 4.1 and 6.0 'FindResult' Response       |
|          |                      |  |
|          |                      |  |

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