



Scottish Care Information

SCI Store

# End User Guide

For SCI Store Release 8.3

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# **1 Introduction**

## **1.1 Purpose**

The purpose of this document is to provide a comprehensive user guide for the SCI Store application.

## **1.2 Intended audience**

This document is intended for Health Board staff that will be routinely using the SCI Store facilities.

*[Note: This document is not intended for Support staff that may require a more detailed knowledge of the methods and procedures underlying the application].*

## **1.3 Scope**

This document provides a description from an end-user perspective of all of the principal features available in SCI Store.

## 2 User access

### 2.1 Accessing the homepage

To logon to the SCI Store Application you should

- Open Microsoft Internet Explorer.
- If your Browser has been configured with the default Home page pointing to the SCI Store application, the Login screen below will be displayed.

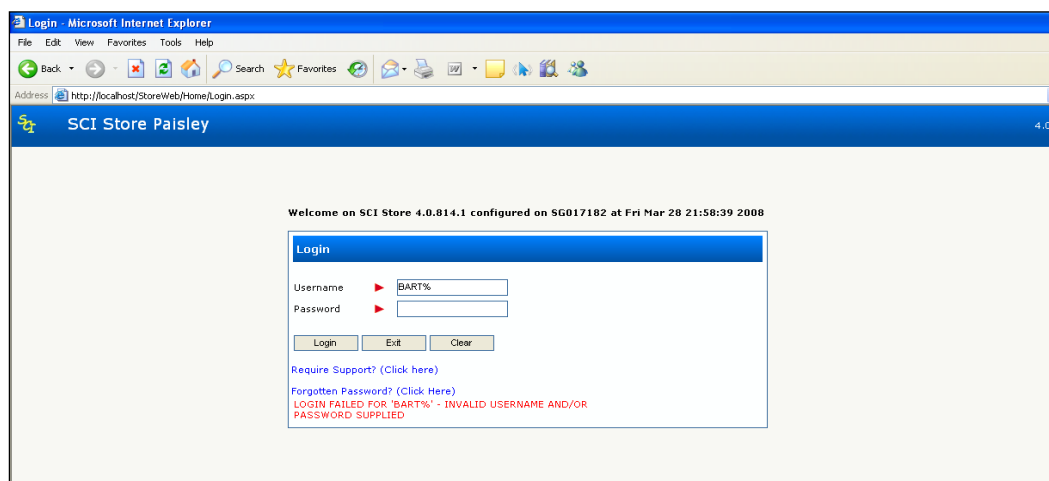
If your Browser has not been configured, type the address provided by your I.T. Department. For example:

⇒ <https://scistoreserver/StoreWeb/Home/Login.aspx>

### 2.2 Login

Once the Login screen has loaded (see Figure 1)

- Enter your Username into the box provided (Figure 1, point 1)
- Enter your Password into the box provided (Figure 1, point 2)
- Click on the Login button (Figure 1, point 3)



**Figure 1: Login Screen**

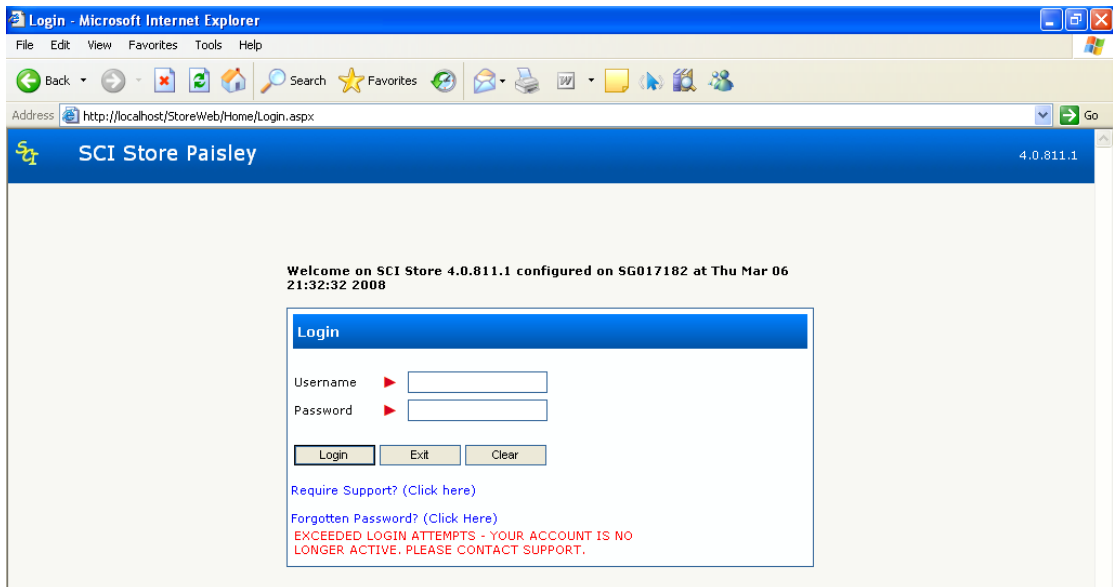
Please Note:

- Passwords are case sensitive
- If an incorrect Username or Password is entered, an error message will be displayed as can be seen on Figure 4, point 8.
- If an incorrect Username or Password has been entered, click on the clear button to clear the page and try again.

If you are having problems with logging in there are two options available to you:

- Require Support: described in more detail in Section 2.3
- Forgotten Password: described in more detail in Section 2.4

If more than three incorrect Login attempts are made, a screen similar to that shown in Figure 2 is displayed. The application will be locked and you will need to contact the I.T. Department to have it unlocked and your Password reset.

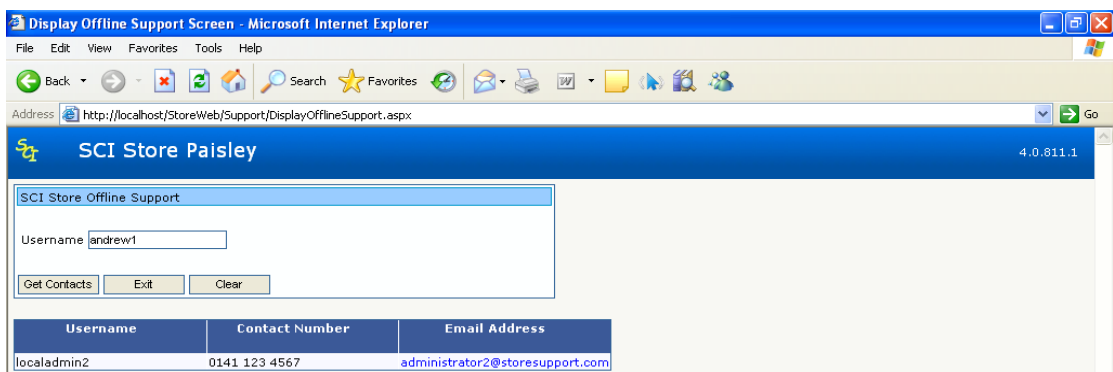


**Figure 2: Exceeded Login Attempts**

A User session is continuously checked to determine if it appears to have become inactive. If, after a predetermined period, no input has been detected, it will be logged off. To terminate the SCI Store application and return to the Windows desktop, simply close the Internet Explorer window.

### 2.3 Require support link

To obtain support the user should click on the “Require Support?” link from the Login screen (Figure 1 point 6). This will display the “SCI Store Offline Support screen” as shown in Figure 3. The user should enter their SCI Store username in the Username field and then click on the “Get Contacts” button. This will display a list of contact details for local administrators to allow the user to submit a support call.



**Figure 3: Support Contacts**

## 2.4 Forgotten password link

If a SCI Store user forgets their password they will be able to reset their password and access SCI Store by clicking on the “Forgotten Password?” link (Figure 1, point 7). This functionality is only available to users that have a set of security questions defined against their account (see sections 2.4 & 3.4).

### 2.4.1 Password reset

- Click the “Forgotten Password?” link on the Login screen.
- The Reset User Password form will then be displayed (Figure 4).

**Figure 4: Reset Password Form**

- Enter the Username
- Click Next.
- The three security questions will then be displayed (Figure 5). If the user has no security questions set against their account it will not be possible to continue.

**Figure 5: Reset Password, Security Question**

- Enter the answers
- Click Next
- If the three answers are correct, the following screen shown in Figure 6 will be displayed. This screen will allow the password to be reset.

Please Note: If any of the questions are answered incorrectly, an error message will be displayed and the user will be prevented from resetting their password. If a user has 3 unsuccessful attempts to change their password, their user account will be locked.

**Figure 6: Confirm New Password**

To reset the password:

- Enter the new password in both textboxes

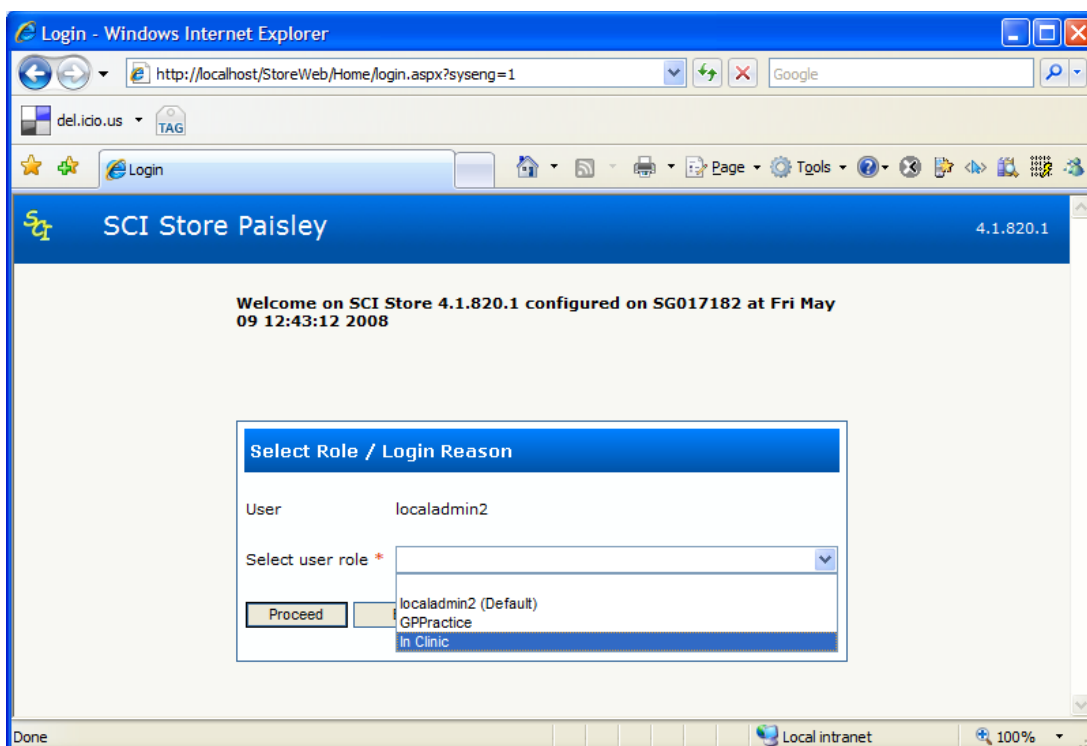
- Click Save
- The user will then be prompted to click Exit to return to the Login screen in order to access SCI Store.

## 2.4.2 Password length and format

Passwords must contain a minimum of 6 and a maximum of 10 characters of which at least one must be numeric. The password must not contain the username.

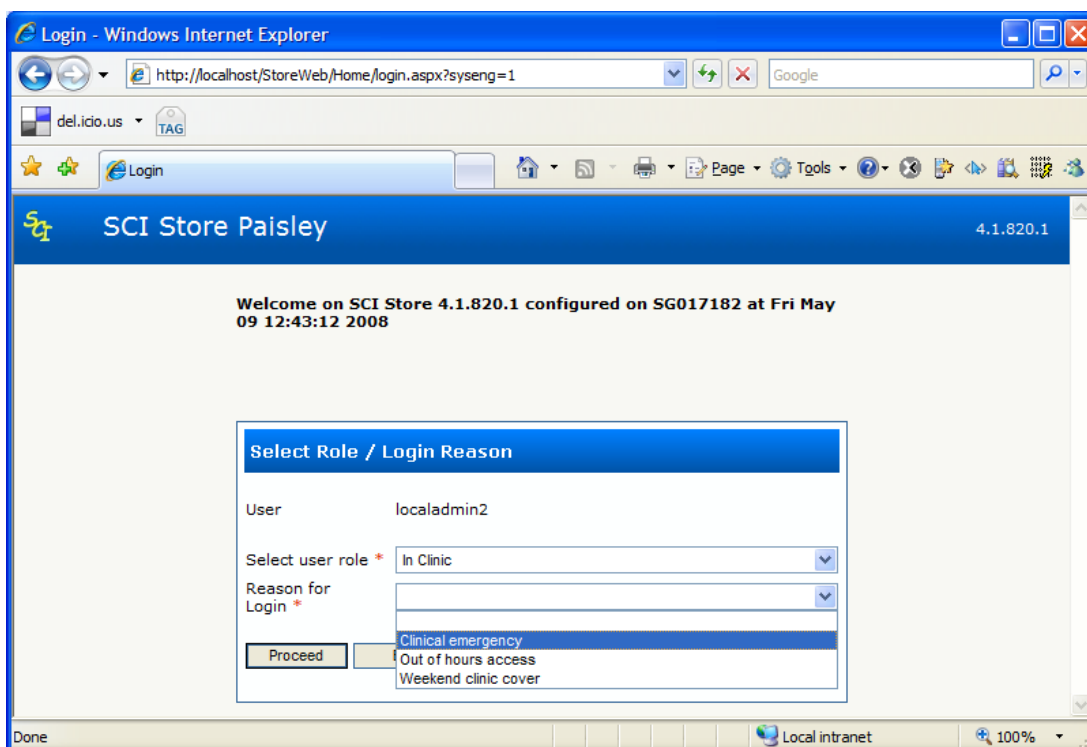
## 2.5 Selecting a user role

If your account has Roles assigned to it, then you must select from a list of roles valid for your current session which will be displayed in a drop-down list. A Role must be selected before you proceed and login to SCI Store.



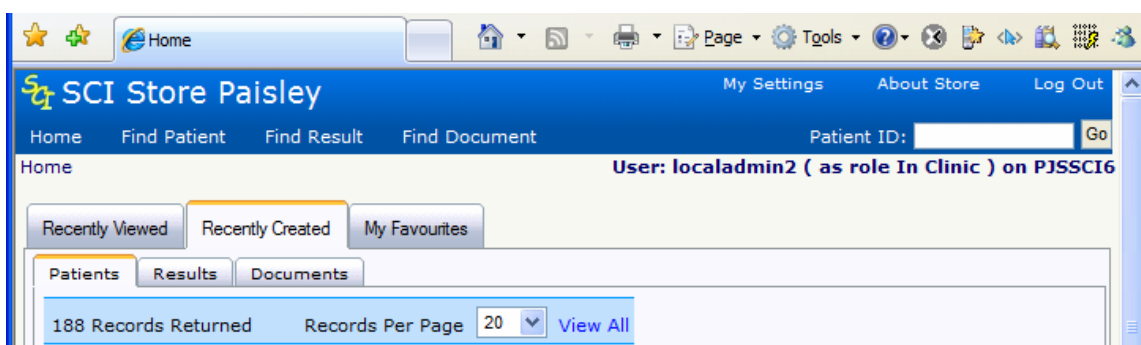
If the role you select has 'Login Reasons' enforced then you must also select a Login Reason from the list presented in the drop-down list.





When a *Login Reason* has been selected you may click on the 'Proceed' button to complete your login. (At any time in the process the 'Exit' button can be clicked to return to the original login page.)

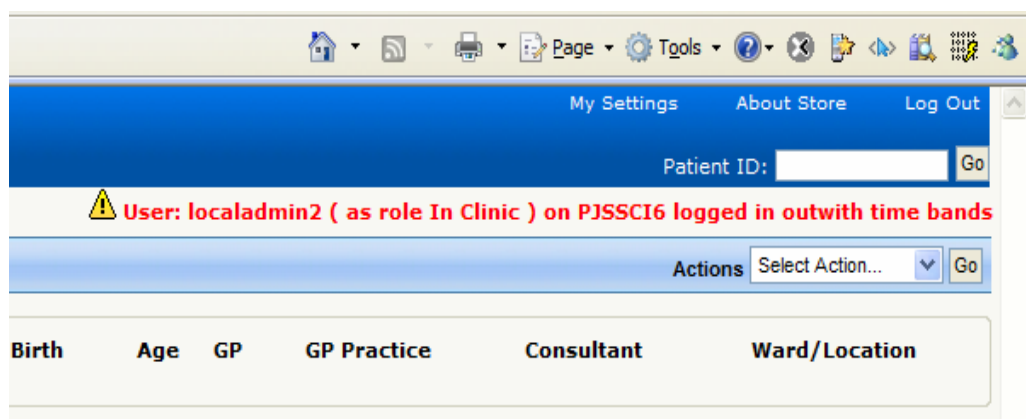
Once you are logged in to SCI Store under a Role, your user details are displayed in the top-right-hand corner of the SCI Store screen.



## 2.6 Time restrictions

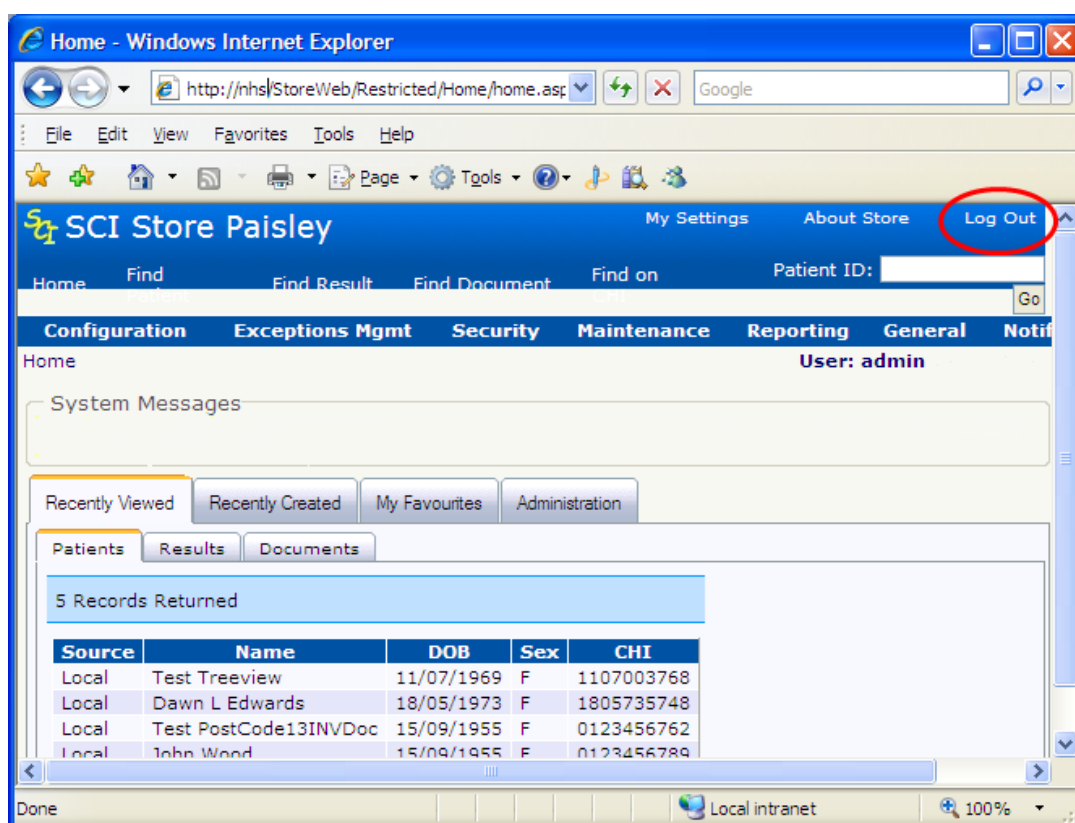
If your User account or the Role which you are logged in as has time restrictions (or 'time bands') associated with it you may be prevented from logging in, or have a smaller list of Roles to choose from, depending on the time at which you are trying to login.

Once you are logged in, if you go over your allowed time you will see a change in the display of your user details.



## 2.7 Logout

To log out of the SCI Store, click on the “Log Out” button at the top right of the screen (see screenshot below). This will end the SCI Store session and return to the login screen.



### 3 Home page

#### 3.1 Overview

After a successful login, the SCI Store Homepage is displayed (Figure 7).

The Homepage is displayed when a user first logs on; it shows the recent activity history for the user and also for the interfaces.

The first time the Home page is displayed, the Last Access Summary audit information will be displayed (see Figure 7, Point 1). This shows a count of the number of patients accessed in the users last session. Once the user navigates away from Home page the Last Access Summary will not be displayed during the rest of this session.

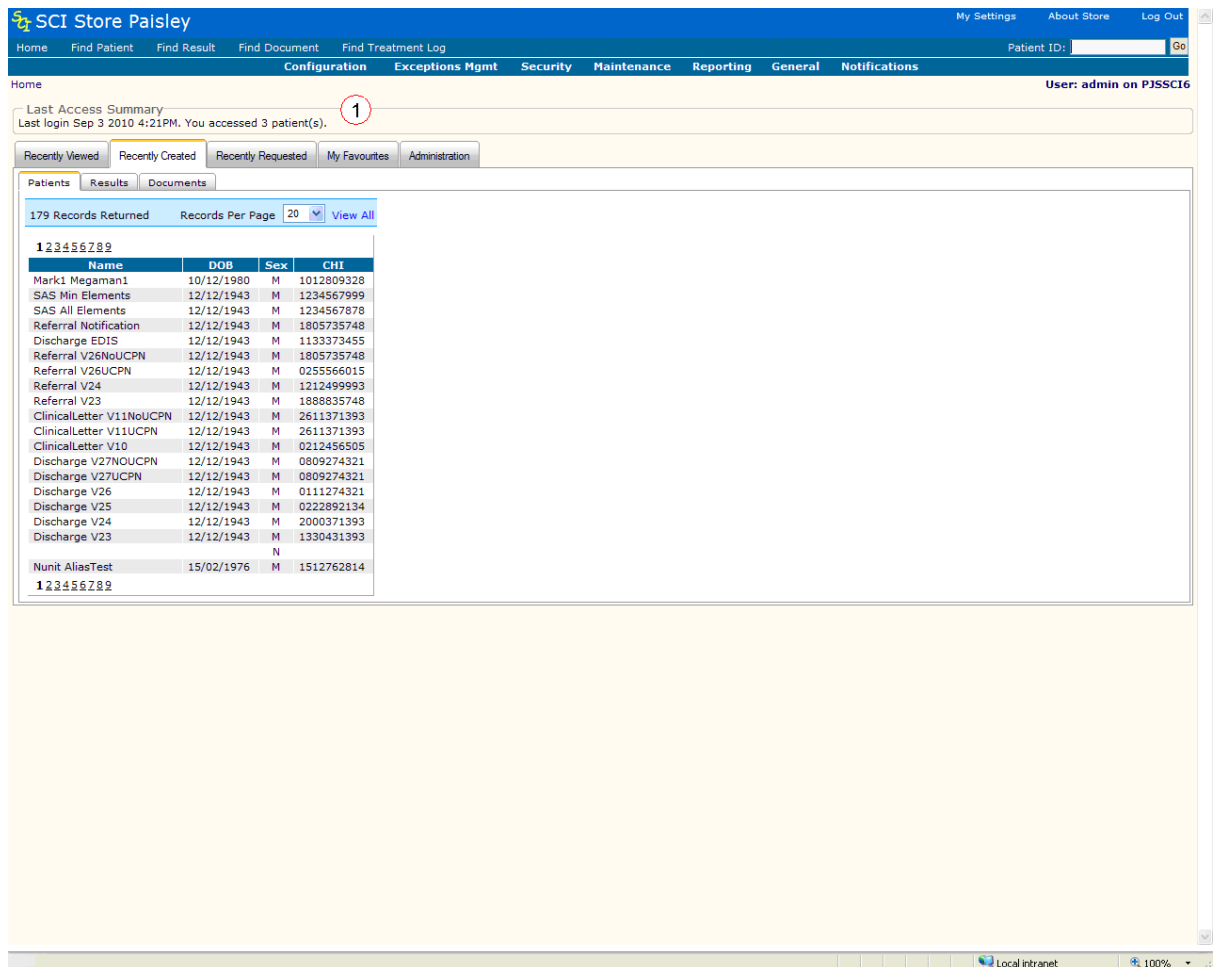


Figure 7: SCI Store Home Page

#### 3.2 Navigation links

A standard navigation toolbar has been implemented throughout the application. This can be found at the top of each page as shown in Figure 8. Each element of this toolbar is described in more detail below.



**Figure 8: Navigation links**

- **My Settings:** Takes the user to the “Manage My Information” section of the application (figure 8 point 1). This is where the user can setup specific home page customisation, change their password and maintain user questions. This is described in more detail in section 8.
- **About Store:** Displays details related to the current version of SCI Store that the user is logged in to (figure 8 point 2). This is described in more detail in section 9.
- **Log Out:** Logs the user out of the SCI Store application (figure 8 point 3). For more information see section 2.7.
- **Home:** Returns the user to the SCI Store Homepage (figure 8 point 4).
- **Find Patient:** Opens the Find Patient Search Screen (figure 8 point 5). See section 4.2 for more information.
- **Find Result:** Opens the Find Result Search Screen (figure 8 point 6). See section 4.3 for more information.
- **Find Document:** Opens the Find Document Search Screen (figure 8 point 7). See section 4.4 for more information.
- **Patient ID Search:** Focus on the Homepage defaults to this element which allows the user to do a quick search for a patient based on any of their ids (figure 8 point 8). The user should:
  - ⇒ Enter the patient id into the Patient Id field.
  - ⇒ Click on the Go button.
  - ⇒ The Find Patient page will be opened displaying a list of patients matching the search criteria. See section 4.2 for more information on the Find Patient page.
- **Breadcrumb Navigation:** Allows a user to quickly access any of the pages that were previously visited to reach the page they are currently on (figure 8 point 9). For example by clicking on Find Patient (as shown in Figure X) the user would be taken back to their original Find Patient search criteria and associated results.

### 3.3 Recently Viewed tab

The *Home Page* displays a summary of recent activity performed by the logged in user. By clicking on the Recently Viewed tab the user can view a list of recently viewed Patients, Results and Documents. These are explained in more detail in the following sections.

The appearance of the recently viewed sections is maintained in the User Customisation section of the application. See section 8.1 for more details.

### 3.3.1 Patients tab

From the Recently Viewed tab, clicking on the Patients tab will display a list of recently viewed patients for a user from both local and remote SCI Stores.

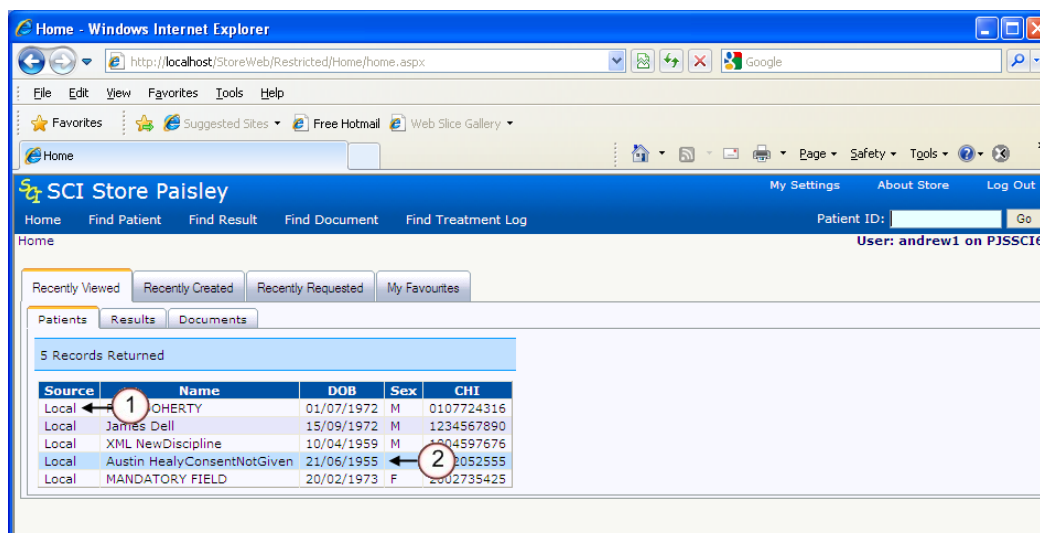


Figure 9: Home Page, Recently Viewed Patients

The Source field highlights to the user the SCI Store the patient was viewed on for example the Local SCI Store or the name of a Remote SCI Store (Figure 9 point 1).

To view additional details for any of the recently viewed patients the user should click anywhere on the relevant patient (figure 9 point 2) to be taken directly to the Patient Details page. (The Patient Details page is explained in more detail in section 5.)

### 3.3.2 Results tab

From the Recently Viewed tab, clicking on the Results tab will display a list of recently viewed results for a user from both local and remote SCI Stores.

The Source field highlights to the user the SCI Store the patient was viewed on for example the Local SCI Store or the name of a Remote SCI Store (see Figure 10 below).

To view additional details relating to a patient, you should click on the Name of the relevant patient, which will take you to the Patient Details screen (see section 5 for further details.)

To view additional details relating to an individual result, you should click anywhere on the relevant row (excluding the name field) to be taken to the Result Details page (see section 6 for further details.)

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

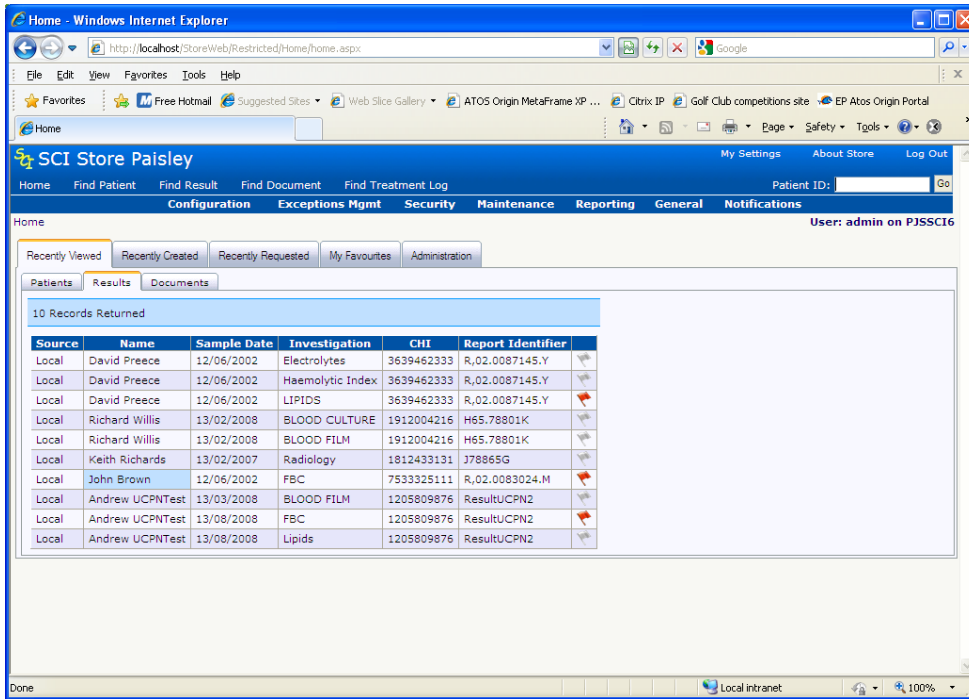


Figure 10: Click on Patient Name to go to Patient Details page

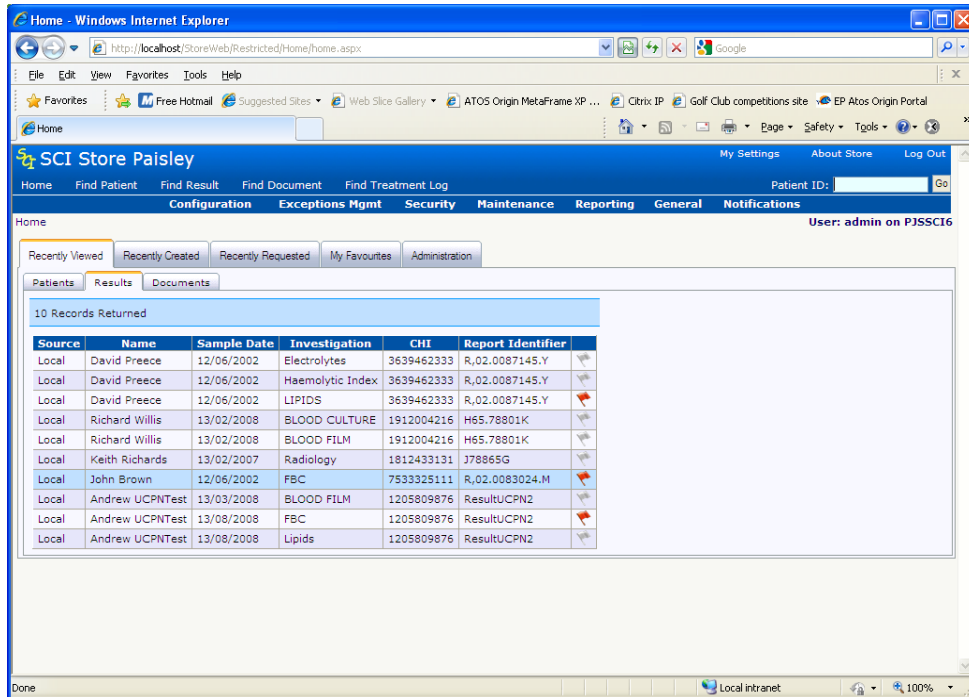


Figure 11: Click anywhere on the row (excluding name field) to go to Result Details page

### 3.3.3 Documents

From the Recently Viewed tab by clicking on the Documents tab the user will see a list of their recently viewed documents.

To view additional details relating to a patient, you should click on the Name of the relevant patient, which will take you to the Patient Details screen (see section 5 for further details.)

To view the actual document, you should click anywhere in the relevant row (excluding the name field) to be taken to the View Document screen. Depending on your browser settings, this will give you the option to open the document within your current web browser or save the document to another location. (See section 7.14 for further details)

To view additional details relating to an individual document, you should click on the 'Info' icon to be taken to the Document Information page (see section 7 for further details.)

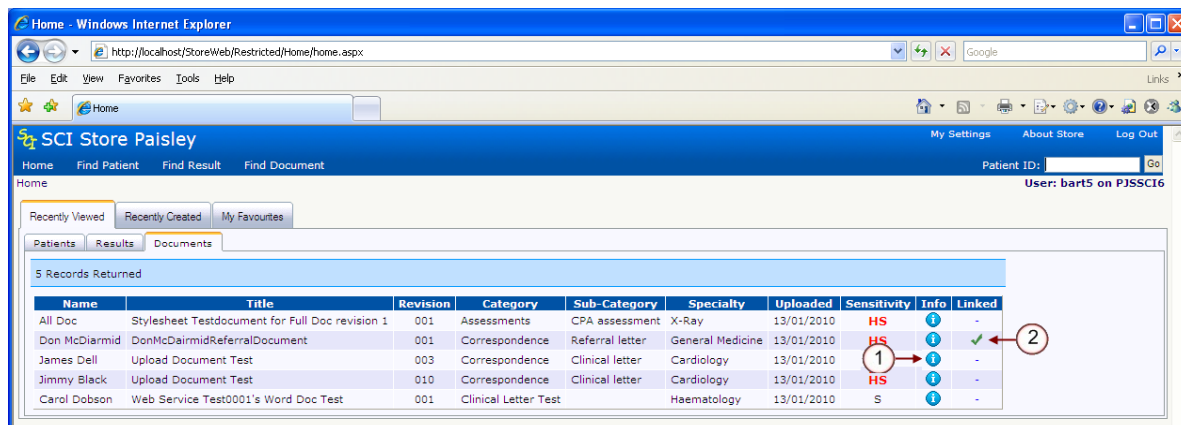


Figure 12: Recently Viewed Documents

If the document has been retired then the 'Info' icon will be replaced by the text 'Retired' and clicking anywhere in the row (excluding the name field) will take you to the Document Information screen

If the document is linked to other documents, a tick will be displayed in the linked field (figure 12 point 2). Clicking on the tick takes you to the Linked Documents page. (See section 7.2 for further details)

### 3.4 Recently Created

By clicking on the Recently Created tab the user can view a list of Patients, Results and Documents that have recently been created on the system. These are explained in more detail in the following sections.

#### 3.4.1 Patients

From the Recently Created tab by clicking on the Patients tab the user will see a list of patients recently created on the local SCI Store.

To view additional details for any of the recently viewed patients the user should click anywhere on the relevant patient to be taken directly to the Patient Details page. (The Patient Details page is explained in more detail in section 5.)

### **3.4.2 Results**

From the Recently Created tab by clicking on the Results tab the user will see a list of recently created results.

To view additional details relating to a patient, you should click on the Name of the relevant patient, which will take you to the Patient Details screen (see section 5 for further details.)

To view additional details relating to an individual result, you should click anywhere on the relevant row (excluding the name field) to be taken to the Result Details page (see section 6 for further details.)


Note: Results that are highlighted in Red indicate a result that contains an abnormal result.

### **3.4.3 Documents**

From the Recently Created tab by clicking on the Documents tab the user will see a list of recently created documents.

To view additional details relating to a patient, you should click on the Name of the relevant patient, which will take you to the Patient Details screen (see section 5 for further details.)

To view the document itself, you should click anywhere on the relevant row (excluding the name field) to be taken to the View Document page (see section 7 for further details).

To view additional details relating to an individual document you should click on the 'Info'  icon for the relevant row to be taken to the Document Information page (see section 7 for further details).

If the document has been retired, the 'Info' icon will be replaced by the text 'Retired' and clicking anywhere on that particular row (excluding the name field) will ta

If the document is linked to other documents, a tick will be displayed in the linked field. Clicking on the tick takes you to the Linked Documents page. (See section 7.2 for further details)

## **3.5 Recently Requested**

### **3.5.1 Overview**

The Recently Requested section allows users to view Recently Requested Results from a pre-defined group of Health Care Professionals (Requestor Group)

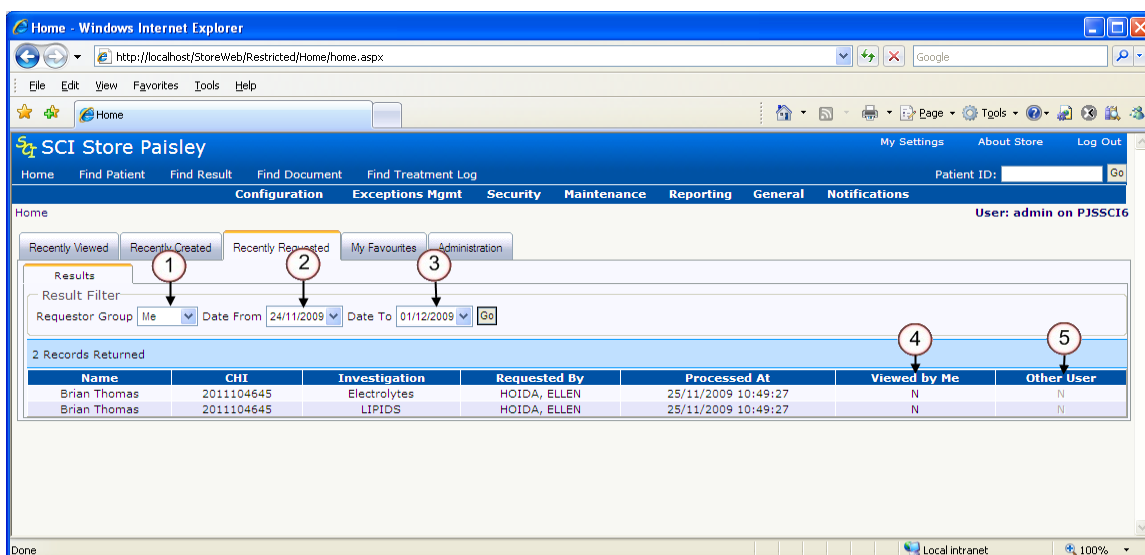
### **3.5.2 Recently Requested Results**

The Recently Requested Results tab allows users to view a list of results that have been requested by one of a user-defined group of healthcare professionals.



These User Requestor Groups must be set up before this functionality can be used. To find out how to set up these User Requestor Groups please see **section 8.5** of this guide.

The Recently Requested Results tab displays a list of results along with a filter. The filter contains a drop down to the Requestor Group (figure 13 point 1) and date pickers to select Date From (figure 13 point 2) and Date To (figure 13 point 3) range. When the tab is first clicked the Group will default to the group of type “Personal” if available, while the Date To will default to today’s date and Date From will default to today – 7 days. This can be seen below.



**Figure 13: Recently Requested Results**

In the Results Row, clicking on the Name column will navigate to the Patient Details screen. Clicking elsewhere on the row will navigate to the Result Details page.

**NB:** Results in this grid are displayed Ungrouped/Grouped by Result Set, which will override the default Results Display system setting when clicking through to the result or patient details pages.

The Results Grid shows two “Viewed By” indicators – one to indicate if the currently logged in user has viewed the **most recent version** of the result (figure 13, point 4) and one to indicate if the most recent version of the result has been viewed by any other user (figure 13, point 5).

If another user has viewed the result the Other User column will be populated with a “Y” hyperlink. Clicking on this hyperlink will display audit information for that result (figure 14)

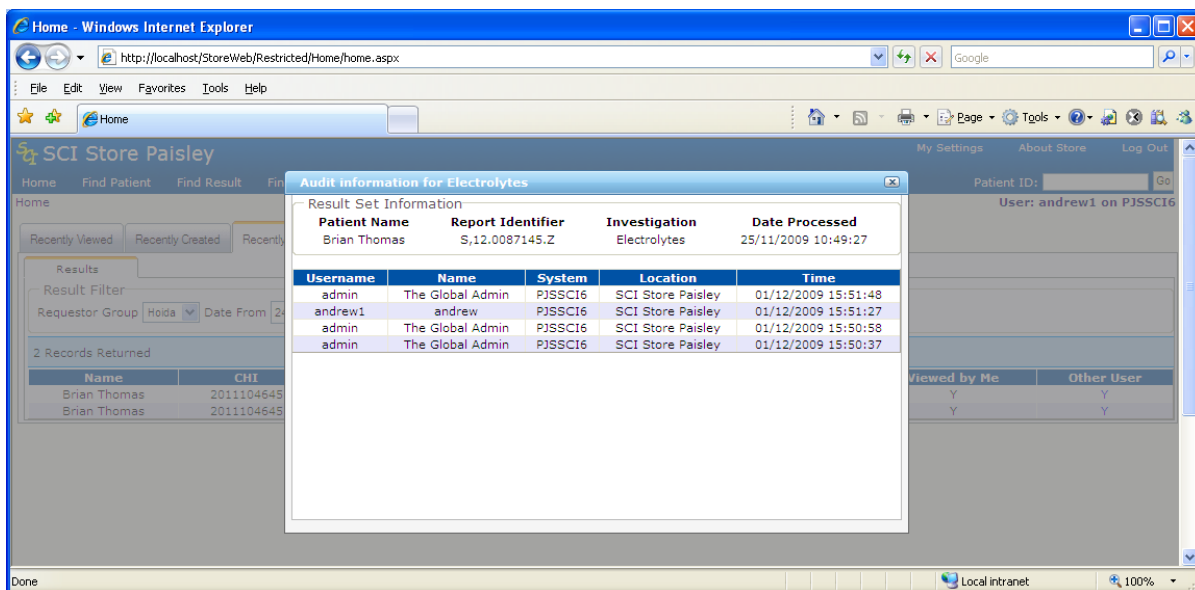


Figure 14: Recently Requested Results Audit Information

### 3.6 My Favourites

#### 3.6.1 Overview

The My Favourites section of the system allows the user to view their own:

- List of Saved Patient Searches (My Searches)
- Patient Lists (My patients)

#### 3.6.2 My Searches

A search initiated from *Find Patient* can be saved for later use, (see section 4.2.9.)

Access to *Saved Searches* is from the *My Searches* tab on the *Home Page*.

To run a *Saved Search*, select a row in the *My Searches* tab (figure 15, point 1). This will re-run the patient search on the *Find Patient* screen and display the search results.

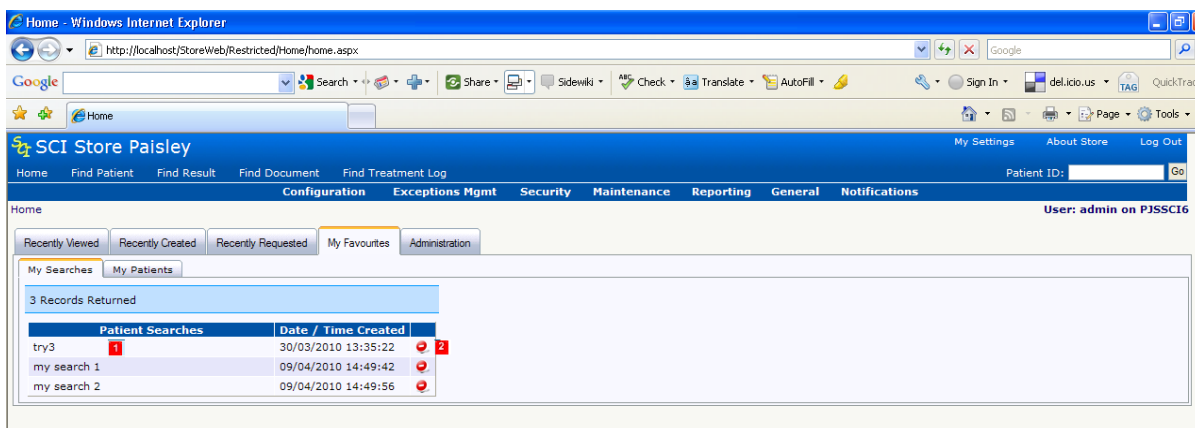


Figure 15: My Searches

To remove any searches that are no longer required the user should click on the “Remove” button on the grid (figure 15, point 2). The user will be asked to confirm “Are you sure you want to delete this record from list?” The user should select “OK” to remove the search or “Cancel” to undo the remove.

### 3.6.3 My Patients

From both the Find Patient and Patient Details screen a user is given the option to add a Patient to their “My Patients List”. Once a patient has been added to this list the only way a user can access it is via the home page on the “My Patients” tab which can be seen in Figure 16.

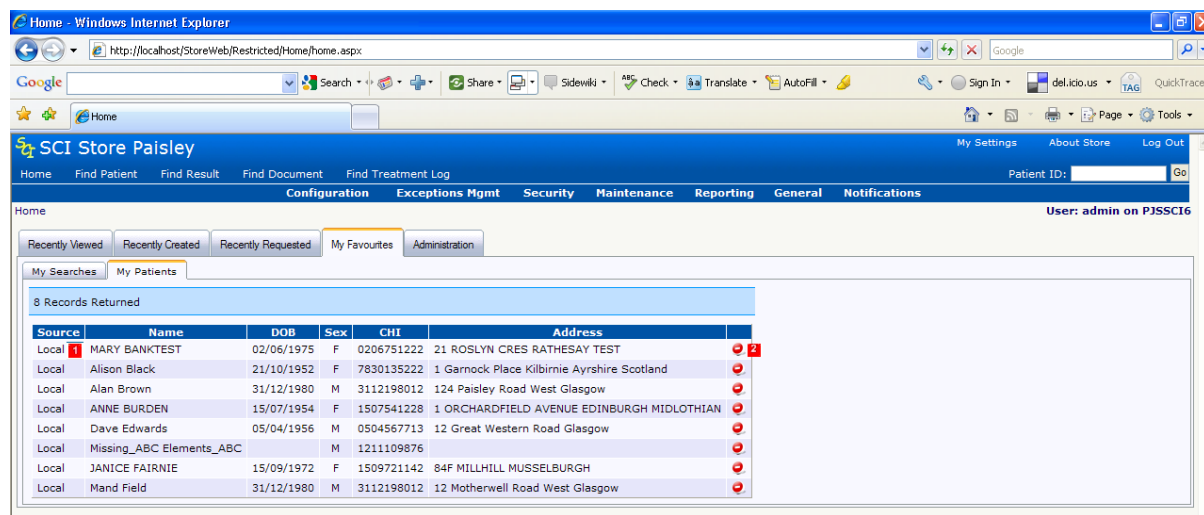


Figure 16: My Patients

The Source field (figure 16, point 1) allows the user to determine whether a patient in their list is from either the Local or the Remote SCI Store.

To view additional details relating to a patient, the user should click anywhere on the relevant row (except on the Delete button). The Patient Details screen will be opened (see section 5 for further details.)

To remove any patients that are no longer required the user should click on the Remove button on the grid (figure 16, point 2). At this point they will be asked to confirm “Are you sure you want to delete this patient from the list?” The user should select OK to remove the patient from this list or Cancel to undo the remove.

## 4 Search forms

### 4.1 Overview

Three main search forms exist in the system to allow users to search for Patients, Results and Documents. These forms can be accessed from the Navigation Menu at the top of each screen and are identified as Find Patient, Find Result and Find Document. Each area is described in more detail later in this section.

### 4.2 Navigation

Each search form has a common Navigation element which is described below.

Once a search has been carried out if the number of results returned is greater than 20 the results grid will automatically limit the page to hold only 20 records per page (figure 17, point 1). The results will be split over multiple pages which the user can navigate around using the grid navigation appearing at both the top and bottom of the grid (figure 17, point 2). To navigate between pages the user should click on the relevant page number to view the results for that page.

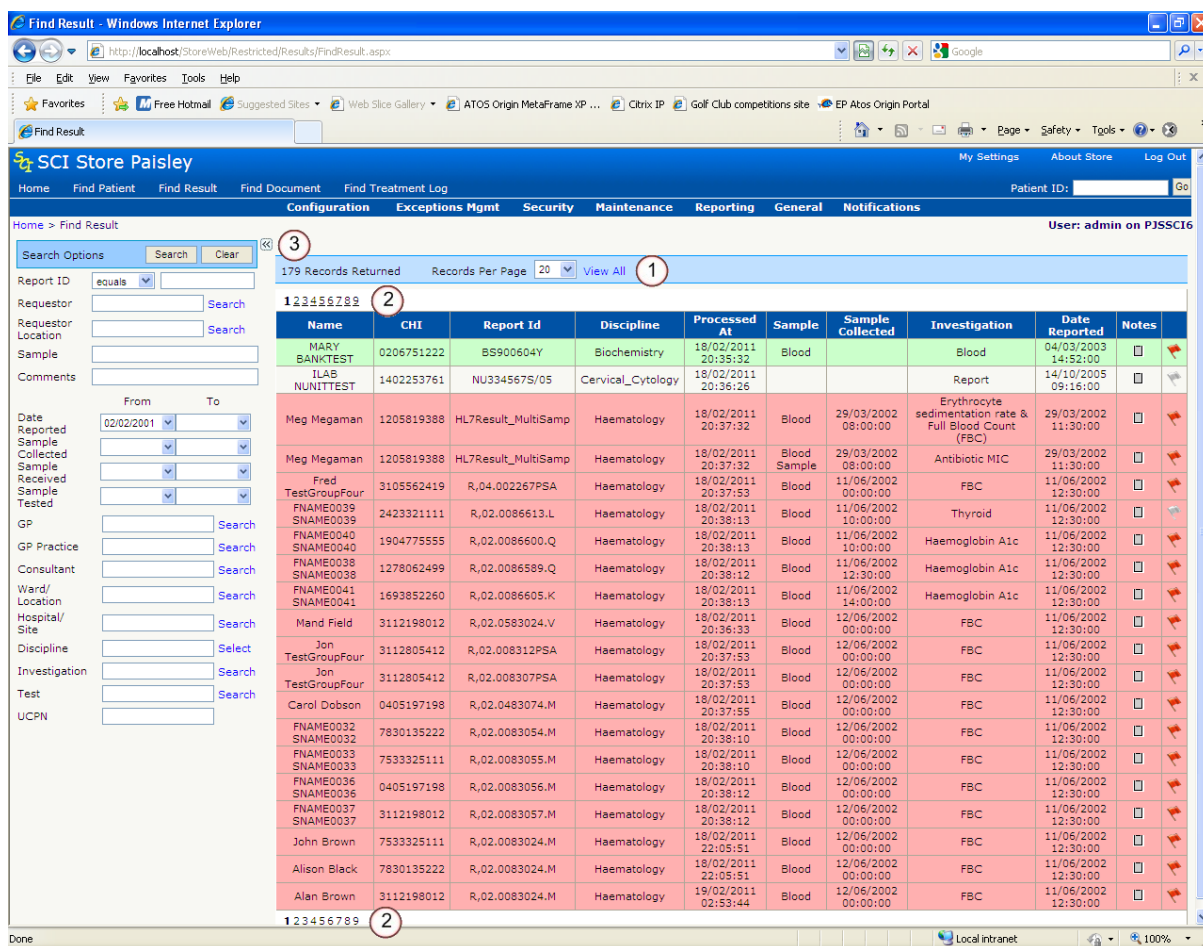


Figure 17: Search Form Navigation

To change the number of rows displayed per page the user may select a different value from the “Records Per Page” dropdown list (figure 17, point 1). This will increase / decrease the number of results displayed on a page. The user also has the option to view all results returned by clicking on the “View All” button.

To hide the search section of the page and expand the results returned across the full page the user should click on the arrow highlighted by figure 17, point 3.

## 4.3 Find Patient

### 4.3.1 Overview

Selecting Find Patient displays a screen allowing users to search for Patients in the SCI Store System.

At least one search criteria must be selected for a successful search to be carried out. Once the search criteria have been entered the user should click on the Search button (figure 18, point 1) to carry out the search.

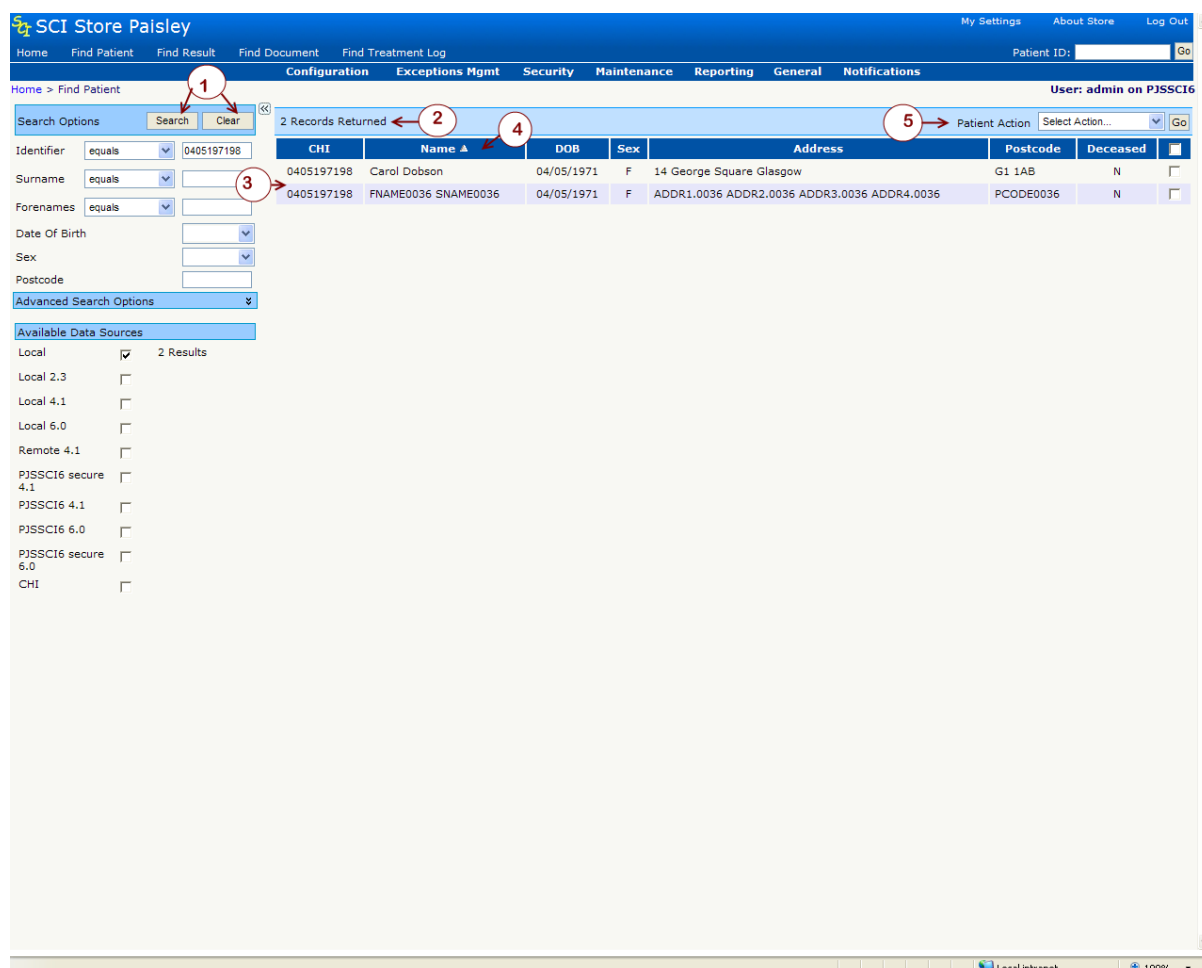


Figure 18: Find Patient Screen

A successful search will display the results to the right of the search fields in a grid (figure 18, point 3).

To view additional details for an individual patient, the user should click anywhere on the relevant patient row to be taken to the Patient Details screen.

An unsuccessful search will display the message “No Data To Display” in the navigation bar (figure 18, point 2).

To reset the search screen the user should click on the **Clear button** (figure 18, point 1). This will reset the current search criteria, results and any error messages that may have occurred.

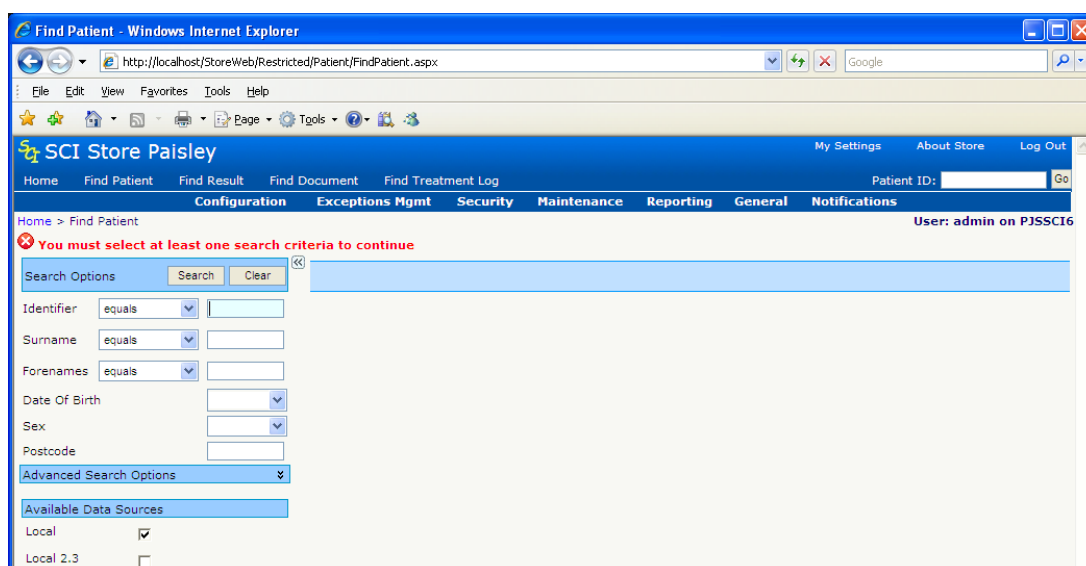


Figure 19: Find Patient Error Messages

If any errors occur during a search an error message will appear at the top left of the screen (figure 19, point 1).

The search criteria can be split into two categories:

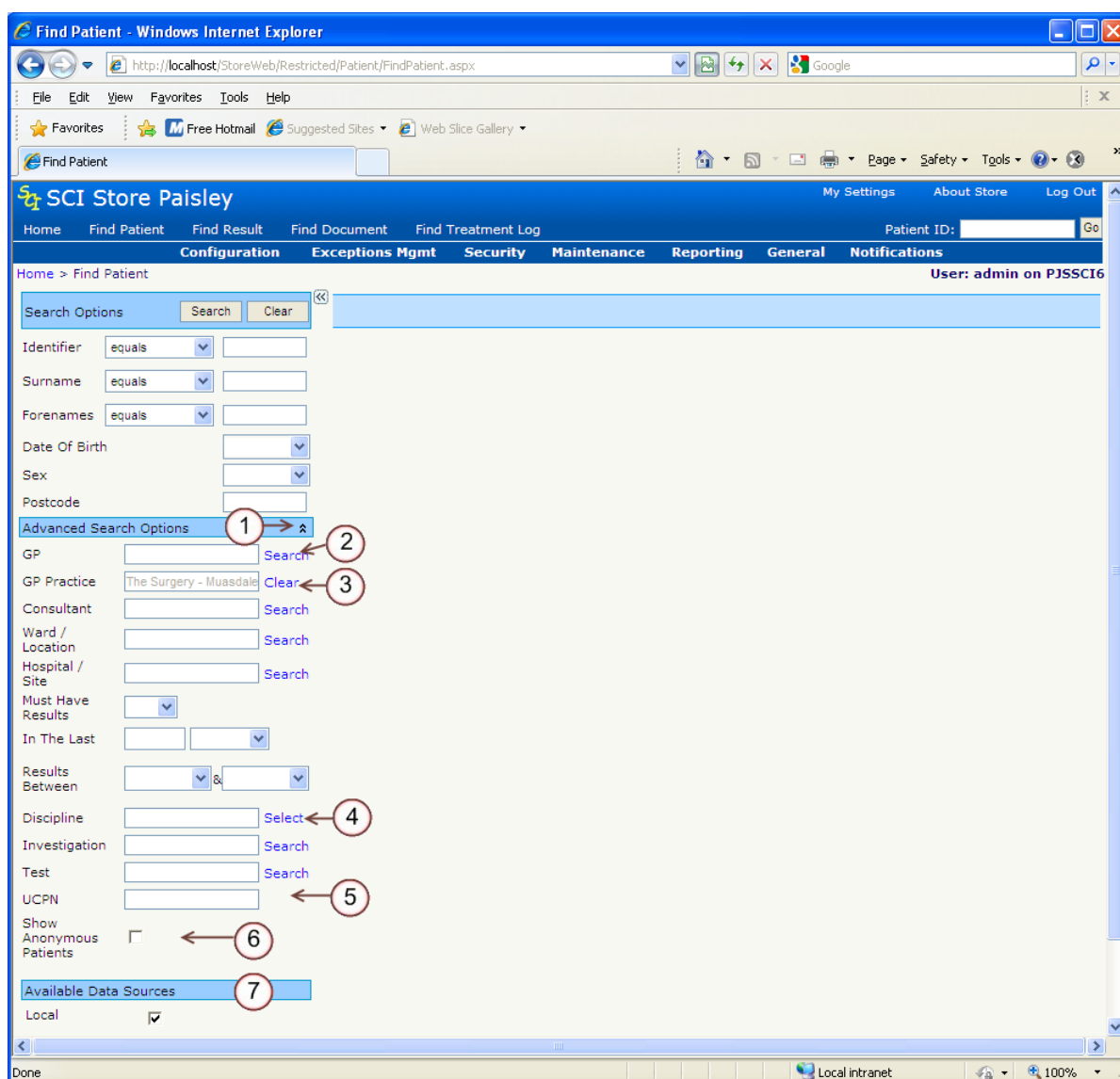
- *Basic Search*
- *Advanced Search*

#### 4.3.2 Basic Search

- Fill in at least one of the criteria Surname, Forename, Date of Birth, Postcode and Identifier.
- If searching on Date of Birth the date can either be typed into the search field or by clicking on the arrow in the field. A calendar control will appear which will allow the user to select the date, month and year for the Date of Birth.
- If needed select whether the search should be “Equals”, “Begins” or “Contains” for each of the criteria entered in the previous step.
- Ensure that at least one “Available Data Source” has been selected see section 4.2.3 for more details.
- Click on the search button to carry out a patient search.

#### 4.3.3 Advanced Search

To view Advanced Search Options click on the chevrons (figure 20, point 1). When not expanded the chevrons point downwards, when expanded they point upwards.



**Figure 20: Find Patient, Advanced Search**

To search on GP, GP Practice, Consultant, Ward, Hospital, Investigation or Test, the user should enter some criteria into the relevant search field and then click on the Search button to the right of the field (figure 20, point 2).

A pop up box will appear. The user should select the appropriate row from the pop up box by double clicking on the row. This will fill the search box with the appropriate search criteria.

To close the pop up box without selecting any criteria the user should select click on the Close button.

To clear the search criteria the user should click on the clear button (figure 20, point 3).

To search on Discipline the user should click on the select button (figure 20, point 4). A pop up box will appear with a list of disciplines. The user should select at least one discipline from the list and then click on the close button. If only one discipline has



been selected it will appear in the search box. If more than one has been selected the search box will read “Multiple items selected...”

The “Results Between” search criteria works in a similar manner to the Date of Birth search. (See section 4.2.1, Date of Birth search).

The UCPN (Unique Care Pathway Number) will search the list of UCPN values against a patient. UCPNs can be attached to Results, Documents and Treatment Log entries.

To include anonymous patients in a patient search, search criteria should be completed as normal and the “Show Anonymous Patients” checkbox should be checked (Figure 20 point 6). This will return both anonymous and non-anonymous patients matching the search criteria.

[Note: Users must be setup with permissions to view anonymous patients. Please contact your systems administrator if you require to view this type of patient].

*[Note: Advanced Search options apply to local searches only].*

## **4.4 Available Data Sources**

### **4.4.1 Overview**

This area of the screen allows the user to define the data source the search should be carried out on. By default all users should have access to search their Local SCI Store. In addition to this users may have permission to search Remote data sources for example other Health boards SCI Stores.

To include a data source in your search ensure the appropriate checkbox is ticked (more than one can be checked if required) (figure 20 point 7). If you require access to other remote SCI Stores please contact your SCI Store Systems Administrator.

Once a search has been carried out the number of records returned from each data source will be displayed next to each of the available data sources that have been selected. An error may appear next to a data source if a problem occurs whilst searching. Contact your systems administrator for more information.

### **4.4.2 Searching Remote Data Sources**

If a remote data source has been selected from “Available Data Sources” only a Basic Search can be carried out.

The minimum search criteria required to carry out a remote data source search are:

- Identifier; or
- Surname and Date of Birth

If the minimum criteria are not met an error message will appear.

### **4.4.3 Searching a CHI Remote Data Source**

If CHI has been selected as a remote data source, only a Basic Search can be carried out.

There are 3 types of CHI Search allowed. The mandatory criteria for one of these searches needs to be met before the search will be invoked. The mandatory fields for these searches are detailed below:

#### Patient Extract

- Identifier (i.e. CHI Number) and a comparator of “equals”

#### Date of Birth Search

- Date of Birth

#### Name Search

- Surname and a comparator of “equals”
- Sex (Male or Female)
- Forename and a comparator of “equals” or “begins”

### 4.4.4 Sorting Results

Clicking on a column header (title) will sort the results by the header in ascending/descending order (figure 18, point 4). Clicking the search button will return the results to the order in which they first appeared.

### 4.4.5 Patient Actions

Once a search has been completed successfully a “Patient Actions” (figure 18, point 5) dropdown list will appear. The patient actions currently available are:

- Print Patient List (Local SCI Store only)
- Print Patient Labels (Local SCI Store only)
- Add To My Patients
- Add to My Searches

Below is a further explanation of each of these functions:

### 4.4.6 Print Patient List

This allows a user to print off a list of patients:

- Select all patients returned by the search by selecting the checkbox in the Header column of the results grid. This will check all patients. OR
- Select individual patients on various pages of the grid by checking the boxes on individual rows.
- Select “Print Patient List” from the “Patient Action” dropdown list and then click on the Go button.
- A pop up box will appear asking to “Provide a title for the report”, here a title should be entered that you would like to appear on the report and then click on the Confirm button. Alternatively clicking on the Cancel button will stop the list being printed at this point.
- A printable list will appear which can be printed by pressing the Print button. This will bring up the standard printer dialogue box for you to print the report.

Alternatively you can click on the Return button to take you back to the Find Patient search screen.

**Note:** If no patients are selected an error message will appear.

#### 4.4.7 Print Patient Labels

This allows a user to print off a list of Patient labels using the LabelTrace software supplied by QuickTrace Ltd. on specialised label printers.

- Select all patients returned by the search by selecting the checkbox in the Header column of the results grid. This will check all patients. OR
- Select individual patients on various pages of the grid by checking the boxes on individual rows
- Select the "Print Patient Labels" from the "Patient Action" dropdown list and then click the "Go" button
- A popup box will appear requesting confirmation of the action you are about to carry out. Click "Proceed" to print out the label(s) on your specialised label printer or click "Cancel" to cancel the print operation.

**Note:** If no patients are selected an error message will appear.

#### 4.4.8 Add To My Patients

This allows a user to collate a list of their patients. This list can be accessed via the Home Page, see section 3.4.2 for more details.

- Select all patients returned by the search by selecting the checkbox in the Header column of the results grid. This will check all patients. OR
- Select individual patients on various pages of the grid by checking the boxes on individual rows.
- Select "Add To My Patients" from the "Patient Action" dropdown list and then click on the Go button. Selected Patients will be added to your list. A message will appear telling you how many patients have been successfully added to your patient list.
- The "My Patient List" can contain a maximum of 50 patients. If more than 50 patients are added to the list an error message will occur.
- If a patient already exists on the My Patient List a message will occur to let you know that one or more patients may already exist on the patient list.

**Note:** If no patients are selected an error message will appear.

#### 4.4.9 Add To My Searches

This allows a user to save their current search for re-use at a later date. Saved searches can be accessed via the Home Page, see section 3.4.1 for more details.

Once a search has been carried out and results have been returned:

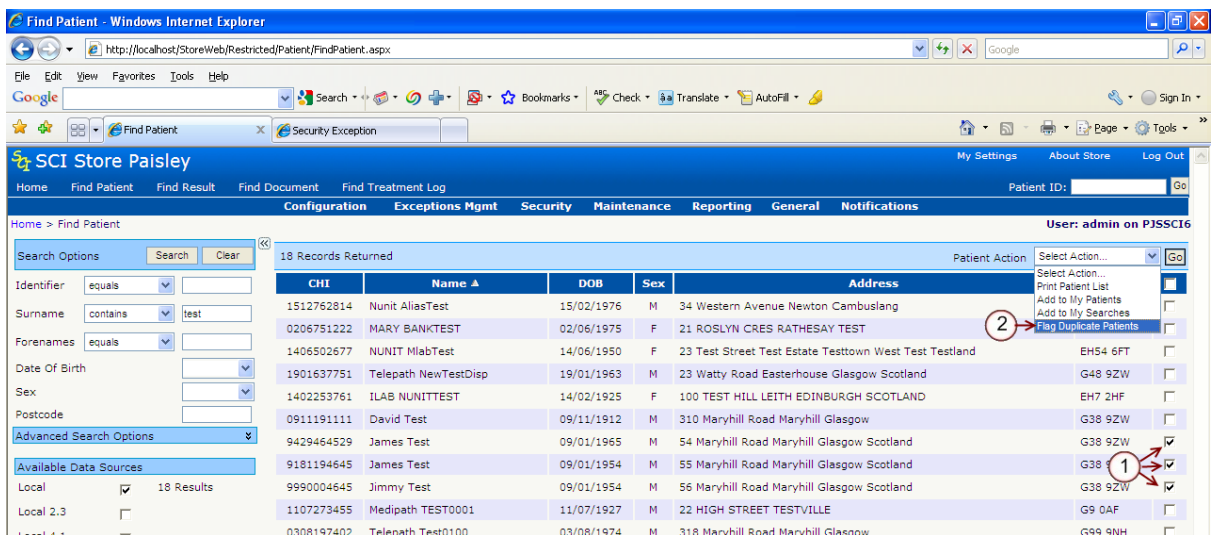
- Select “Add To My Searches” from the “Patient Action” dropdown list and then click on the Go button.
- A pop up box will appear asking to “Choose a name to identify this saved search”, here a meaningful name should be entered to allow you to identify the search at a later date. Then click on the Save button. Alternatively clicking on the Cancel button will stop the search being saved at this point.

#### 4.4.10 Flag Duplicate Patients

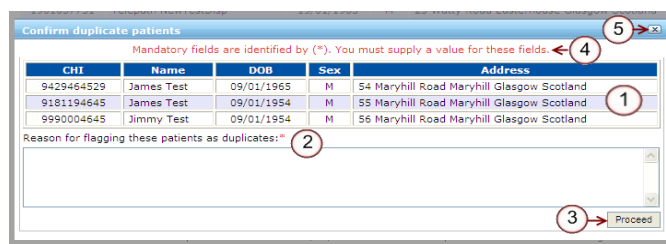
This allows users with the appropriate permission to report suspected duplicate patients to a SCI Store administrator for review.

To flag patients as duplicates

- Perform a Find Patient search
- Select the suspected duplicate patients using the checkboxes on the right of the search results (highlighted by point 1 in the following diagram).
- Select the **Flag Duplicate Patients** action from the actions dropdown list (point 2, in the following diagram). Click on the **Go** button. A **Confirm Duplicate Patients** popup box will appear.




The **Confirm Duplicate Patients** popup box (diagram below) displays a list of patients to be flagged as duplicates (point 1, below).



To flag duplicates a **reason** must be entered in the space provided (point 2 above) and then the **Process** button (point 3 above) should be clicked. If no reason is

entered before clicking the Process button an error message will be displayed (point 4 above).

To cancel the flagging of duplicate patients the  icon on the popup box should be clicked.

#### 4.5 Find Result

This provides the user with a facility to search for results held in the SCI Store. The search criteria are entered in the same way as they are in the Find Patient screen (please see sections 4.2.1 and 4.2.2 for more details). To perform a search, enter the required criteria and click the Search button (figure 21, point 1).

If a search field is mandatory a red asterisks will appear to the right of the field label (Figure 21, point 2).

When search results are returned, test results are returned and not patient records.

When the results are returned the options are available:

- A result can be clicked on and its details will be displayed in the Results Details page (see section 6 for more details.)
- A note can be added (figure 21, point 3) to the result by clicking the “Add Note” icon (see section 6.2.4 for more details.)

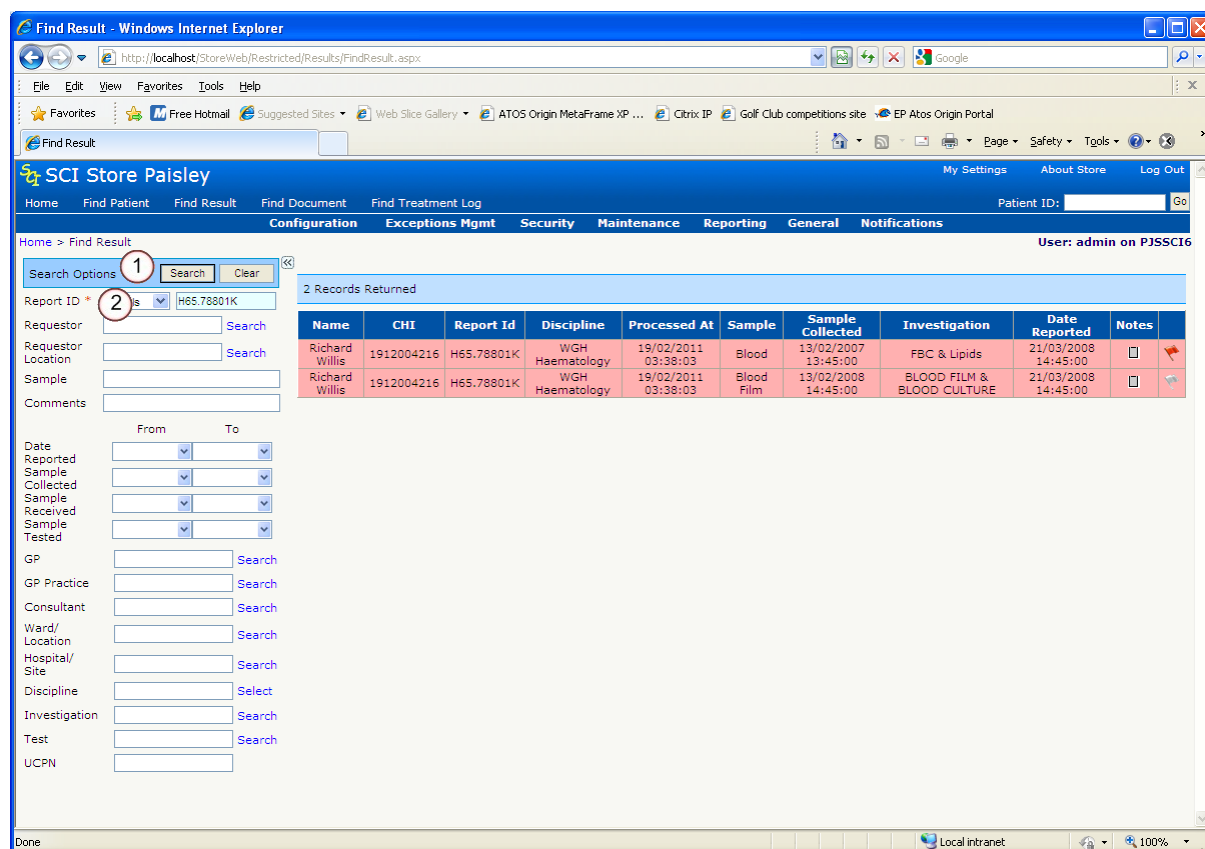


Figure 21: Find Results

## 4.6 Find Document

This screen allows a user to search for any documents (both current and historical), such as clinical letters in the SCI Store.

Generally search criteria are entered in the same way as they are in the other search screens (please see sections 4.2.1 and 4.2.2 for more details.)

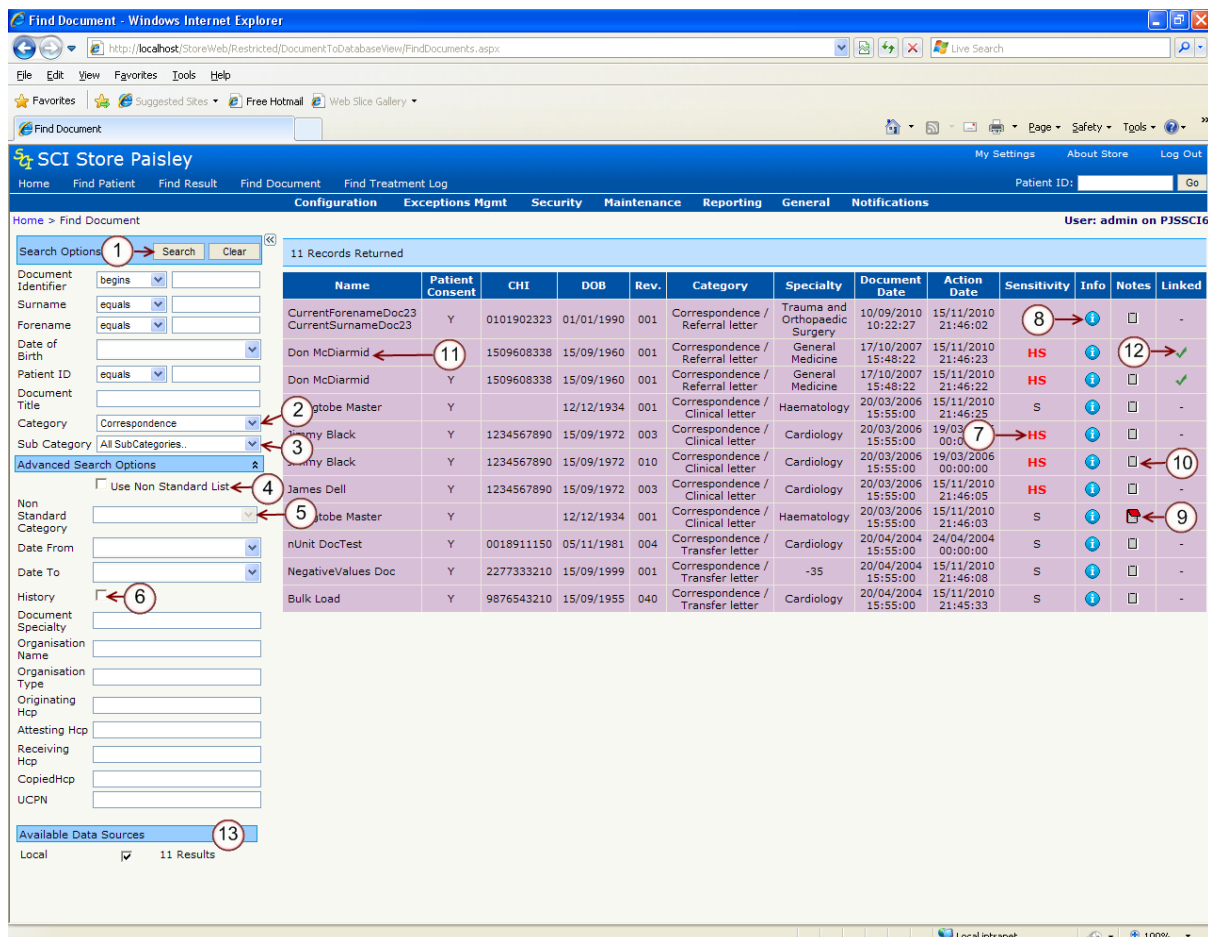


Figure 22: Find Document Screen

To perform a valid search:


- A Category must be selected from the Category dropdown list (Figure 22, point 2). Once a Category has been selected a Sub category may be selected (Figure 22, point 3) OR
- A Category must be selected from the Non-Standard Category dropdown list (Figure 22, point 5.) To enable this list the Use Non-Standard List checkbox must be checked. (Figure 22, point 4)

To view only historical documents click on the History checkbox (Figure 22, point 6.)

Once the relevant criteria have been entered click the Search button (Figure 22, point 1)

Documents that are of a highly sensitive nature are flagged with a Sensitivity rating of “HS” which is highlighted in red (Figure 22, point 7).

When the documents are returned a number of options are available:

- The document information can be viewed by clicking the ‘Info’  icon link (Figure 22, point 8)
- A note can be added to the document by clicking the Add Note icon (Figure 22, points 9 and 10, see section 7.1.5 for more details). If notes already exist for a document the notes icon will appear as an open notebook as highlighted in Point 9 in Figure 22.
- View additional Patient Details by clicking on the Name field (Figure 22, point 11)
- If the document is linked to other documents, a tick will be displayed in the linked field. Clicking on the tick takes you to the Linked Documents page. (Figure 22, point 12) (See section 7.2 for further details)
- The document itself can be viewed by clicking on any of the fields not mentioned above (the entire row will be highlighted).
- Users are able search remote data sources for Documents (Figure 22, point 13). When a user selects to search a remote data source the History and UCPN search fields will be disabled.

## 5 Patient Details

### 5.1 Overview

The Patient Details screen contains a general overview of the current patient, including Results, Documents, Demographics (Names, Addresses and Telecoms), ADT's, IDs and Audit History.

When viewing a patient from a remote data source, the Patient Details screen contains an overview including Results, Documents and IDs.

General patient details such as Patient Name, CHI and Date of Birth are displayed at the top of the screen (see Figure 26, Point 1.)

### 5.2 Navigation

The Patient Details screen has its own Navigation toolbar, which is described below.

The toolbar can be seen in Figure 25. Icons appearing in this toolbar may vary depending on individual user permissions and the status of the patient. Following is a description of each of the points highlighted in the toolbar.



Figure 25: Patient Details Navigation

1. **Return to Home Icon:** Will return the user to the Home Page.
2. **Printer Friendly Icon:** Displays a printer friendly version of the tab the user is currently looking at. See section 5.10.7 for more details
3. **Print Label Icon :** Displays the LabelTrace print dialog for printing Patient Labels. See section 5.10.6 for details on printing labels
4. **Maintain Patient Icon:** *stuff to be included*
5. **Breakglass Icon:** Navigates to the Breakglass screen. This allows existing patient consent to be overridden to allow the current user to view additional information for the patient. See section 5.10.2 for more details.
6. **Cumulative Report Icon:** Selecting "Cumulative Report" from the dropdown list will display the results for a patient based on the system settings relating to the number of report days and the default report view. See section 5.10.3 for more details.
7. **Manual Document Upload Icon:** Selecting 'Manual Document Upload' from the dropdown list will display the Manual Document Upload screen. See section 5.10.4 for details.
8. **Actions dropdown menu.** Perform actions on selected items in the search results grid



## 5.3 Results Tab

This tab displays any results that are associated with a patient. The results are colour coded based on Discipline. When the page is first loaded the display of the results is determined by the “ResultDisplay” System Setting. Results will either be:

- Grouped By Report; or
- Ungrouped By Report

### 5.3.1 Display Mode

The user can change the current Display Mode by switching between modes as shown in Figure 26, Point 2.

The screenshot shows the 'Patient Details' page in Internet Explorer. The patient information includes:

<b>Patient Name</b>	CHI	Date Of Birth	Age	GP	GP Practice	Consultant	Ward/Location
Andrew UCPNTest	1205809876	12/05/1980	30	HORN, CHRISTOPHER	DUNBAR MEDICAL CENTRE		

The 'Filter By' section includes a 'Discipline' dropdown (3) and a 'Display Mode' dropdown (2) with options for 'Group By Report' and 'Ungroup By Report'.

The 'Results' table shows 3 records returned:

Report Id	Discipline	Processed At	Sample	Sample Collected	Investigation	Date Reported	Notes	.....
ResultUCPN1	Haematology	18/02/2011 20:38:54		13/02/2006 13:45:00	FBC & Lipids	22/06/2008 14:45:00		
ResultUCPN2	Haematology	18/02/2011 20:38:54	Blood Film	13/03/2008 14:45:00	BLOOD FILM	25/06/2008 14:45:00		
ResultUCPN2	Haematology	18/02/2011 20:38:54	Blood	13/08/2008 13:45:00	FBC & Lipids	25/06/2008 14:45:00		

The 'Last 3 users to access this patient' table is also visible:

Name	System	Location	Time
WS Unit Test	Store50Test	Unit Test	18/02/2011 23:49:51
WS Unit Test	UnitTestApp		18/02/2011 23:44:14
WS Unit Test	UnitTestApp		18/02/2011 23:41:26

Figure 26: Patient Details, Results

### 5.3.2 Results Filtering

Results may be filtered using the “Filter By” criteria (point in Figure 26, Point 3).

These are explained in more detail below:

- Discipline: Allows the user to filter on the result discipline. Only disciplines relevant to the current patient results will be displayed in the selection list. For more details on selecting a discipline see section 4.2.2.
- Processed Range: Allows the user to filter on results that have been entered into the store within the last 1, 7, 14 or 30 days. Users can also select to view all results

- The default value for this is controlled by a system setting, which can be overridden by the user under the My Settings menu option
- UCPN (Unique Care Pathway Number): Allows the user to select a UCPN number to filter on. Several results can be entered under one UCPN number. To view all result the “Select All” option should be selected.

Once the filters have been selected, click on the Go button to see a filtered view of the results.

To remove the filter, unselect any Disciplines that have been selected and clear the “Processed in the Last” textbox and click on the Go button again.

When the results are returned the options available are:

- A result can be clicked on and its details will be displayed (see Section 6 for more details).
- A note can be added to the result by clicking the Add Note icon (see section 6.2.4 for more details) (figure 26, point 5)
- View the Cumulative Reporting page by clicking on the Cumulative Reporting icon. (see section 5.8.3 for more details) (Figure 26, point 5).

### **5.3.3 Last User to Access Patient/Result/Document**

Last user to access patient/result/document panel is a list of the last users accessing a patient record, result or document (see Figure 26, Point 6 and Figure 27, Point 5). This audit view shows the following user related details:

- Name
- System
- Location
- Time

The information is visible on the:

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

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 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 user accesses section will not be displayed.

### 5.3.4 Normalcy Indicator

The Normalcy indicator flag (see Figure 26, Point 7) displays whether a sample (when grouped) or result set (ungrouped) contains a test result that has been found to be abnormal. The flag will appear red when an abnormal result is present and grey when no abnormal results are present.

For more information on what constitutes an abnormal result please see Appendix A

## 5.4 Documents Tab

This screen lists the documents that are associated with the current patient.

### 5.4.1 Document Filtering

Documents may be filtered using the “Filter By” criteria (figure 27, point 1). These are explained in more detail below:

- **Category:** Allows the user to filter by document Category. The default is “All Categories”
- **Sub Category:** Allows the user to filter by Sub Category, this can only be selected once an appropriate Category has been selected.
- **UCPN (Unique Care Pathway Number):** Allows the user to filter by UCPN. Several documents can be entered into Store with the same UCPN, or the UCPN could be unique to one document.
- **Processed Range:** Allows the user to filter on results that have been entered into the store within the last 1, 7, 14 or 30 days. Users can also select to view all results
  - The default value for this is controlled by a system setting, which can be overridden by the user under the My Settings menu option
- **Search History:** If this field is checked, allows the user to view only historic versions of the document. If the field is unchecked only current revisions of the document will be displayed.

Once the filters have been selected, click on the **Go** button to see a filtered view of the results.

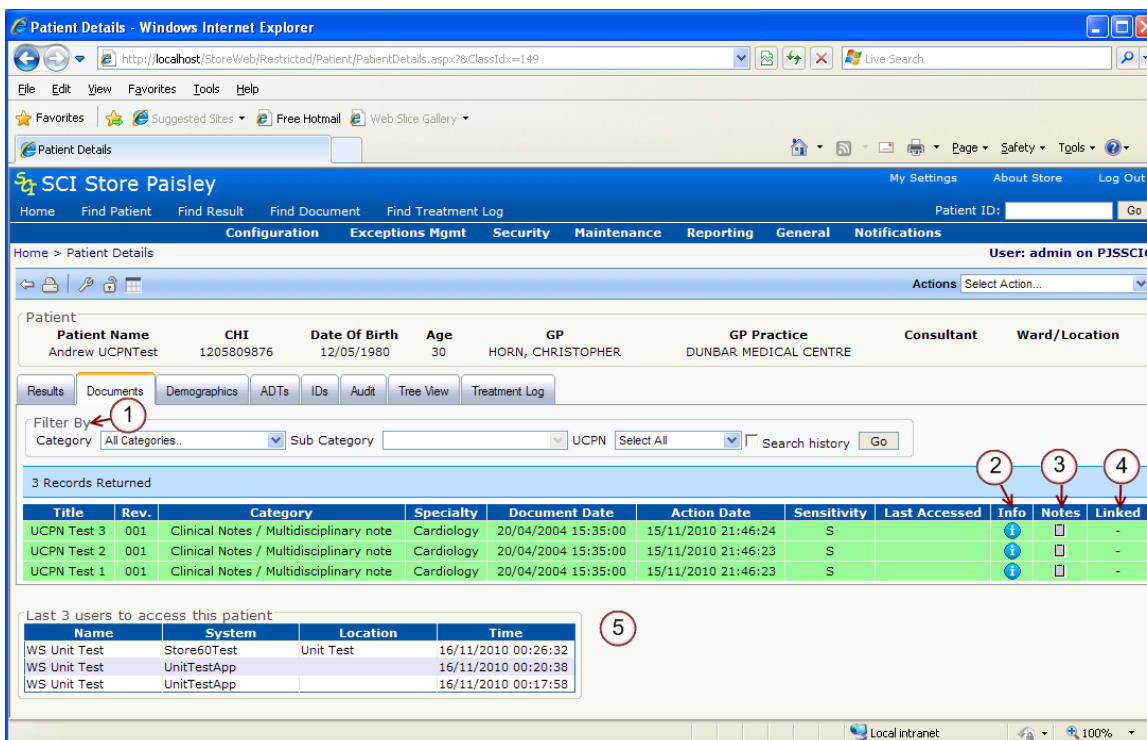


Figure 27: Patient Details, Documents

To remove the filter, **unselect** any **Disciplines** that have been selected and **clear** the **Processed in the Last** textbox and click on the **Go** button again.

A number of options are available from the documents grid:

- The document information page can be viewed by clicking the 'Info' icon link (see section 7 for more details).
- A note can be added to the document by clicking the **Add Note** icon (figure 27, point 3) (see section 7.1.5 for more details)
- If the document is linked to other documents, a tick will be displayed in the linked field. Clicking on the tick takes you to the Linked Documents page. (figure 27, point 4) (See section 7.2 for further details)
- The document itself can be viewed by clicking on any of the fields not previously mentioned (the entire row will be highlighted).

### 5.5 Demographics Tab

The Demographics tab lists current and previous Name, Address and Telecoms details for the current patient. Click on the relevant tab to view details.

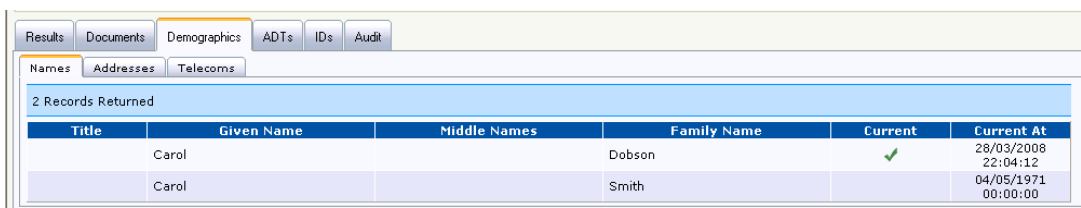


Figure 28: Patient Details, Demographics

The current Name, Address and Telecoms details are highlighted by a green tick in the Current column (see figure 28).

A Service Name column may also be displayed in this tab. This displays details of the service which supplied these demographic details.

This column will only be displayed if the “ShowServiceName” system setting and equivalent module permission have been assigned.

### 5.6 ADTs Tab

The ADT tab displays a list of all the Admission, Discharge and Transfer details for that particular patient in SCI Store.

### 5.7 IDs Tab

The ID tab displays a list of all ids for the current patient. The ID will be shown along with its type e.g. CHI, CRN etc.

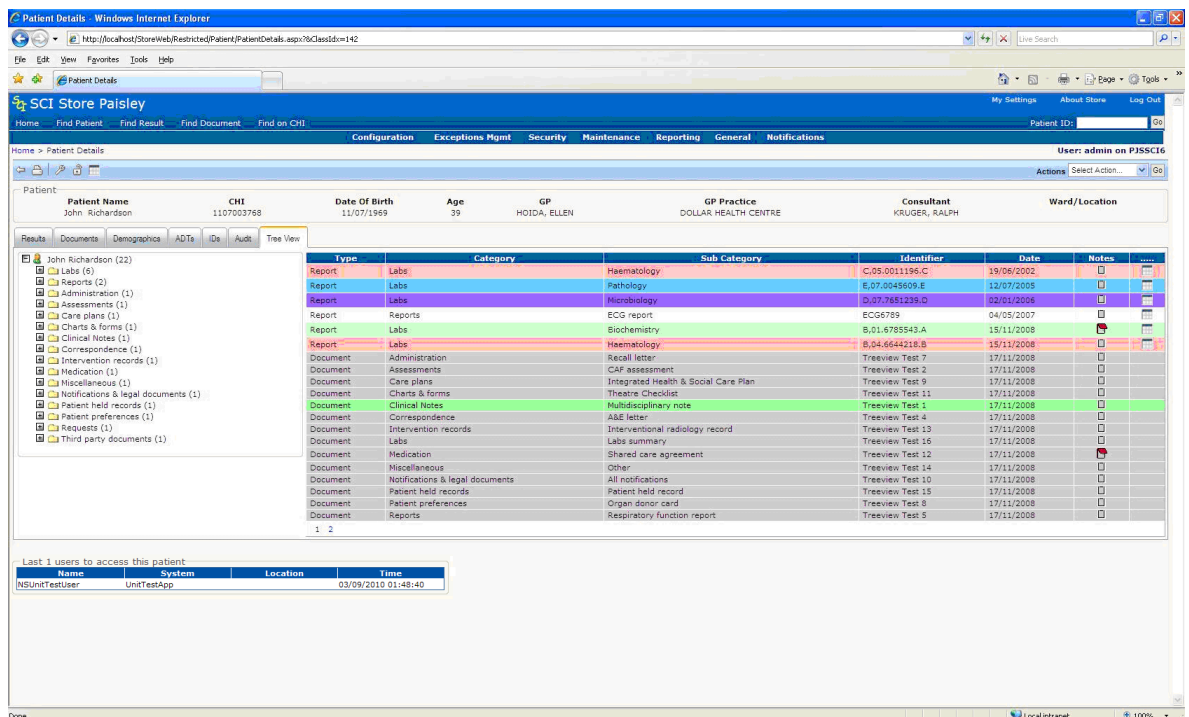
### 5.8 Audit Tab

The Audit tab shows a record of which users have looked at the current patient and at what time.

### 5.9 Tree view Tab

This tab displays a combined view of any results and documents that are associated with a patient. The results are colour coded based on Discipline. When the page is loaded the display of the results is determined by the “ResultDisplay” System Setting. Results will either be:

- Grouped By Report OR
- Ungrouped By Report



**Figure 29: Patient Details, Tree View**

The Tree View tab comprises of two components.

On the left side of the tab is the Tree View control which allows navigation and filtering of the patients combined results and documents.

The combined records can be filtered by selecting the following nodes of the Tree View.

- All documents and results for all categories and sub categories (figure 30, point 1).
- All documents or results for the specific category chosen (figure 30, point 2).
- All documents or results for the sub category chosen within its specific category (figure 20, point 3).

**Figure 30: Patient Details, Tree View Navigation**

On the right side of the Tree View tab is the results grid. This allows the following actions to be selected for individual documents or results or for the combined results.

- Sort the combined results by clicking the required heading (figure 31, point 1).
- Displays the notes for a result or document by clicking the notes icon (figure 31, point 2). A different icon will be displayed if the document already has notes associated with it (figure 31, point 4).

- Displays the Cumulative Report for the result (figure 31, point 3). Documents have no option for Cumulative Reports (figure 31, point 5).
- If additional pages of results and documents have been returned they can be navigated to by clicking the required page number from the displayed page numbers (figure 31, point 6).

Type	Category	Sub Category	Identifier	Date	Notes	.....
Report	Labs	Haematology	C.05.0011196.C	19/06/2002	<input type="checkbox"/>	
Report	Labs	Pathology	E.07.0045609.E	12/07/2005	<input type="checkbox"/>	
Report	Labs	Microbiology	D.07.7651239.D	02/01/2006	<input type="checkbox"/>	
Report	Reports	ECG report	ECG6789	04/05/2007	<input type="checkbox"/>	
Report	Labs	Biochemistry	B.01.6785543.A	15/11/2008	<input type="checkbox"/>	
Report	Labs	Haematology	B.04.6644218.B	15/11/2008	<input type="checkbox"/>	
Document	Administration	Recall letter	Treeview Test 7	17/11/2008	<input type="checkbox"/>	
Document	Assessments	CAF assessment	Treeview Test 2	17/11/2008	<input type="checkbox"/>	
Document	Care plans	Integrated Health & Social Care Plan	Treeview Test 9	17/11/2008	<input type="checkbox"/>	
Document	Charts & forms	Theatre Checklist	Treeview Test 11	17/11/2008	<input type="checkbox"/>	
Document	Clinical Notes	Multidisciplinary note	Treeview Test 1	17/11/2008	<input type="checkbox"/>	
Document	Correspondence	A&E letter	Treeview Test 4	17/11/2008	<input type="checkbox"/>	
Document	Intervention records	Interventional radiology record	Treeview Test 13	17/11/2008	<input type="checkbox"/>	
Document	Labs	Labs summary	Treeview Test 15	17/11/2008	<input type="checkbox"/>	
Document	Medication	Shared care agreement	Treeview Test 12	17/11/2008	<input type="checkbox"/>	
Document	Miscellaneous	Other	Treeview Test 14	17/11/2008	<input type="checkbox"/>	
Document	Notifications & legal documents	All notifications	Treeview Test 10	17/11/2008	<input type="checkbox"/>	
Document	Patient held records	Patient held record	Treeview Test 15	17/11/2008	<input type="checkbox"/>	
Document	Patient preferences	Organ donor card	Treeview Test 8	17/11/2008	<input type="checkbox"/>	
Document	Reports	Respiratory function report	Treeview Test 5	17/11/2008	<input type="checkbox"/>	

Figure 31: Patient Details, Tree View Results

### 5.10 Treatment Log Tab

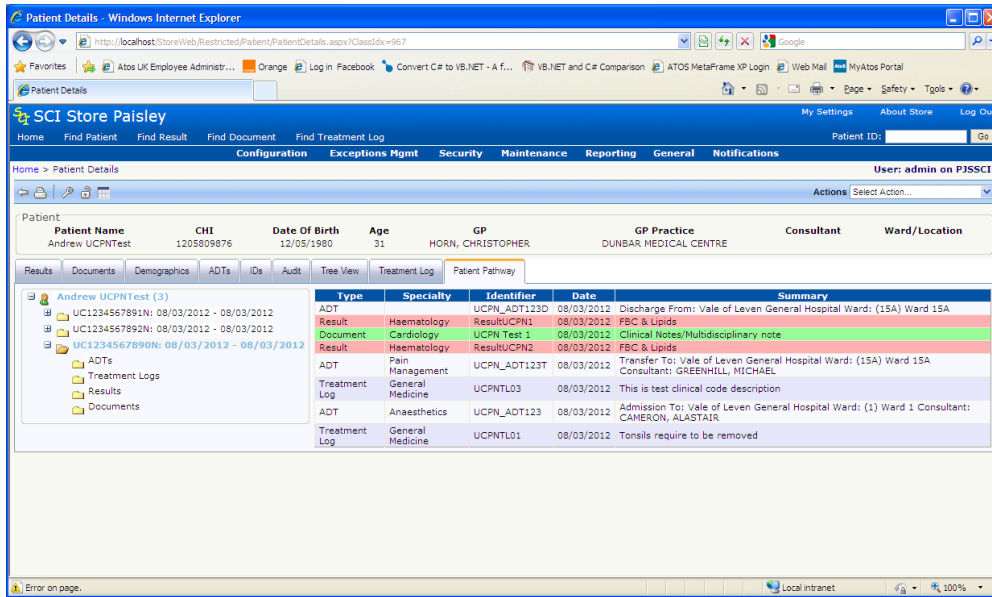
The treatment log tab displays a list of treatment log files that exist for the selected patient. The list can be filtered on Request State and Request Status.

The screenshot shows the 'Patient Details' page in a web browser. The 'Treatment Log' tab is active, displaying a table of treatment logs. The table has the following data:

Treatment Log ID	UCPN	Procedure Code	Scheduled Treatment Date	Request Date	Request Status	Assessed Priority
UCPNTL03	UC1234567890N	A123	03/12/2009	03/11/2009	Outstanding	Urgent
UCPNTL01	UC1234567890N	A123	05/08/2009	22/06/2009	Outstanding	Urgent

### 5.11 Patient Pathway Tab

Similar to the treeview tab, the Patient Pathway tab shows a combined view of ADTs, Results, Treatment logs and Documents for the selected patient, grouped under their common Unique Care Pathway Number (UCPN). Only items that have a UCPN are displayed.

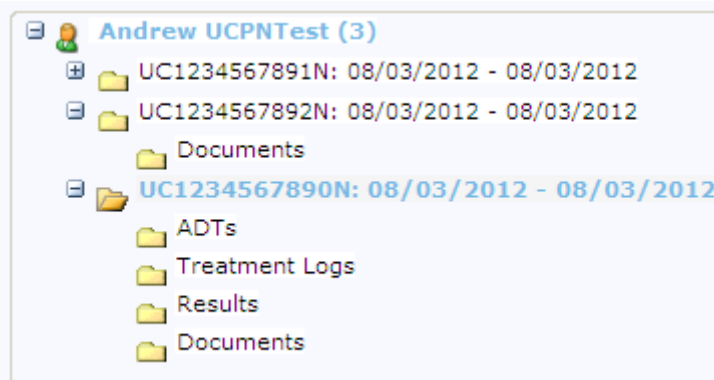


The page comprises 2 components

- A treeview of UCPNs against the patient
- A list of items associated to the selected UCPN and any selected subcategory.

The top level node of the treeview displays the patient name and the number of UCPNs against the patient. The first sub-level displays a list of UCPNs along with the dates the UCPN was first and last encountered.

Under the UCPN level, a list of data type sub-categories is displayed. Currently the data types that can be assigned a UCPN are ADTs, Treatment Logs, Results and Documents. Only the data types that contain items will be displayed in the treeview e.g. if the UCPN only has documents against it then only the Documents sub-category will be displayed.



Clicking on a UCPN node in the treeview will expand that node to display the sub-categories nodes for that UCPN and will also populate the list of items associated to that UCPN. Selecting any of the data type sub-categories in the treeview will filter the list to display only items of that data type.



Type	Specialty	Identifier	Date	Summary
ADT		UCPN_ADT123D	08/03/2012	Discharge From: Vale of Leven General Hospital Ward: (15A) Ward 15A
Result	Haematology	ResultUCPN1	08/03/2012	FBC & Lipids
Document	Cardiology	UCPN Test 1	08/03/2012	Clinical Notes/Multidisciplinary note
Result	Haematology	ResultUCPN2	08/03/2012	FBC & Lipids
ADT	Pain Management	UCPN_ADT123T	08/03/2012	Transfer To: Vale of Leven General Hospital Ward: (15A) Ward 15A Consultant: GREENHILL, MICHAEL
Treatment Log	General Medicine	UCPNTL03	08/03/2012	This is test clinical code description
ADT	Anaesthetics	UCPN_ADT123	08/03/2012	Admission To: Vale of Leven General Hospital Ward: (1) Ward 1 Consultant: CAMERON, ALASTAIR
Treatment Log	General Medicine	UCPNTL01	08/03/2012	Tonsils require to be removed

The list contains a number of fields including a summary of each of the items included in the list. For each data type the summary is slightly different.

- ADT - The hospital, ward and consultant that the patient was admitted to, transferred from & to, and discharged from.
- Results - The investigation name. Results can be grouped or ungrouped by sample
- Documents - The clinical index category and sub-category of the document
- Treatment Log – The clinical code description from the treatment log

The default sort order for the list is descending date. The date in question should be the date the item was last processed into Store. Clicking on a row in this list will take the user to the relevant details page. The ADT data type does not currently have a details page so clicking an ADT row will have no effect.

## 5.12 Actions

By selecting the relevant item from the Actions dropdown list (figure 25, point 6) various functions can be carried out against a patient. These are explained in more detail below.

To carry out one of these actions Select the action from the dropdown list and click on the Go button.

### 5.12.1 Add To My patients

Allows a user to add a patient to their “My Patient List” (see section 3.4.2).

Once this action has been carried out a message should appear to let the user know whether the patient has been added successfully.

The action may not be successful if:

- The “My Patient List” already contains 50 patients.
- If a patient already exists on the My Patient List.

### 5.12.2 Breakglass

Overrides a patients consent wishes allowing the current user to view restricted patient information. An audit record is kept of any users that Breakglass and their reasons for doing so.

Manual Document Upload

### 5.12.3 Cumulative Report

This is a cumulative view of reports against a patient filtered on search criteria entered by the user.

Report Legend : significant data = '\*' bounded list = '='

TEST	19/07/2005 11:00:00 *	14/07/2005 *	11/07/2005 *
<b>POTASSIUM</b> 3.5 - 5.0 mmol/l	3.8		
<b>RBC COUNT</b> 4.50 - 6.50 x10 <sup>12</sup> /L	3.24		
<b>SODIUM</b> 135 - 145 mmol/l	236		
<b>TRIGLYCERIDES</b> 0.50 - 3.00 mmol/l	0.92 *		
<b>WHITE BLOOD COUNT</b> 4.0 - 11.0 x10 <sup>9</sup> /L	13.1		
<b>Blood film</b>			
<b>Hb</b> 12 - 16 g/dl		11.6	12.6
<b>Basos</b> 0 - 2 x10 <sup>9</sup> /l			0.0
<b>Eosin</b> 0 - 5 x10 <sup>9</sup> /l			0.20
<b>Hct</b> 370 - 470 Ratio			0.39
<b>Lymphs</b> 1.5 - 4.0 x10 <sup>9</sup> /l			2.5
<b>MCH</b> 27 - 32 pg			24.9
<b>MCV</b> 80 - 96 fl			78

COMMENT: N/A  
REF RANGE: 0 - .2  
UNITS: x10<sup>9</sup>/l  
ABNORMAL: N/A  
LOCAL CODE: BAS  
DESC: Basos  
BOUNDED CODE: BAS  
BOUNDED CODE DESC: Basos  
DISCIPLINE: Haematology  
SET DESC: FBC  
SOURCE: MasterLab  
DATE USED: SAMPLE  
REQUESTOR: \*\*, \*\*  
REQUESTOR (CHC6)  
LOCATION: Clydebank HC 6  
REPORT ID: H098851

Figure 32: Cumulative Reporting

To perform a valid search:

- Date From \ To, Source and Discipline or Report Template must be completed before a search can be carried out.
- Using Report Templates allows the user to filter on Result Sets (e.g. FBC, Lipids)
- The user may also decide whether the report should be ordered in ascending or descending order.
- They can also decide whether the report should have dates along the top and tests along the side (Dates on X-axis) or tests along the top and dates along the side (Dates on Y-axis).
- Click on the Generate Report button, a grid containing matching reports will be displayed

By moving the mouse over any of the returned fields, a tooltip will appear. This will show general report information and any associated comments.

An asterisk (\*) in a cell indicates there are comments against that cell, or that there is a difference between the recommended reference range and the actual reference range.

By clicking on one of the hyperlinks in the rows returned, the Results Detail page will be opened for the particular result (see section 6).

For abnormal results the text in the cell will be red.

### 5.12.4 Manual Document Upload

For the Manual Document Upload action to be available three preconditions must be met:

- The user must have the appropriate module permission set
- An Manual Document Upload interface must be configured and set as active
- The current patient must be a local patient

When this action is selected the user is presented with the Manual Document Upload screen as below:

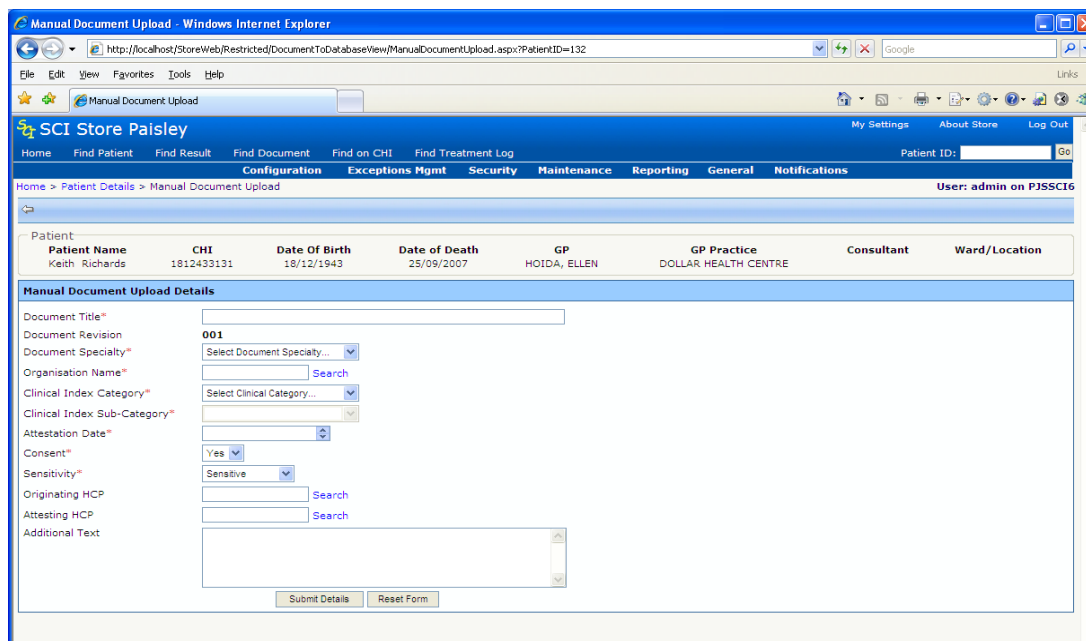


Figure 33: Manual Document Upload

This screen allows a user to manually upload a document into SCI Store for the current patient; the document will be stored in the storage type defined by the active Manual Document Upload interface.

Below is a summary of the manual Document Upload details form data

Item	Description	Type
Document title	Enter a name for the document (mandatory)	Field (Input)
Document revision	Automatically generated by the system (mandatory)	Field (read Only)
Document	Select document specialty from dropdown list.	Field (Input)

Specialty	(mandatory)	
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) (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 may be uploaded at a time.
- Only plain text or binary documents (i.e. MS Office, PDF, OpenOffice) may be uploaded.
- XML files may be uploaded but there is no mechanism in place to upload any associated stylesheets.

When values for all mandatory fields have been entered, clicking the ‘Submit Details’ button, the screen will then display the following additional fields:

Item	Description	Type
Document Location	Select the document to be uploaded by clicking ‘Browse’	Button + Field (read only)
Browse	Function to search file directory to locate 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 figure 34 below. The manual Document Upload details are set to read-only when the upload file form portion is displayed.

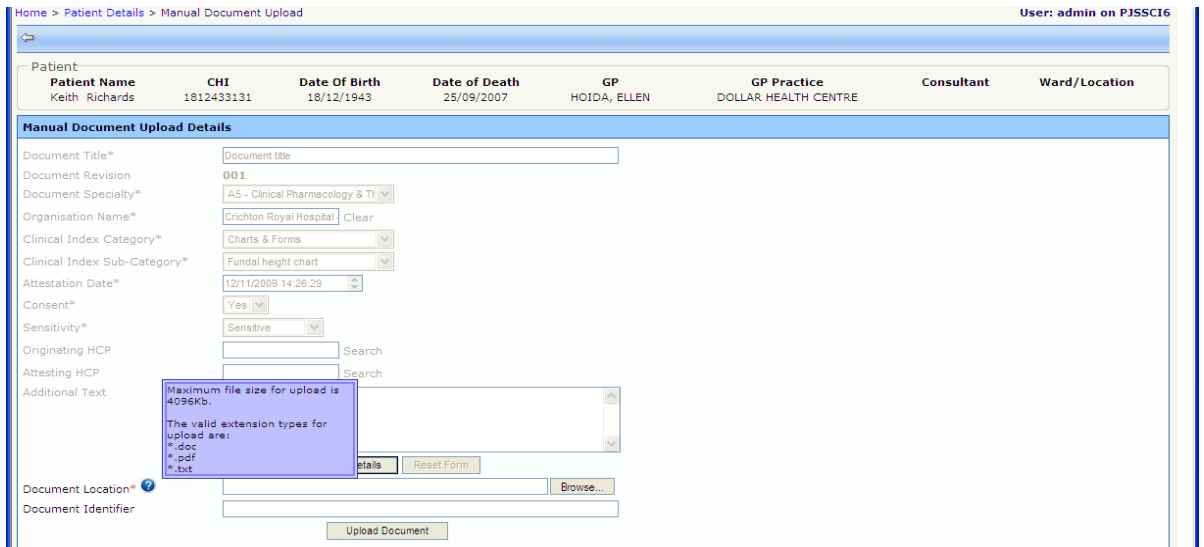


Figure 34: Manual Document Upload file info details

A tooltip is provided to denote the document size limit and valid file type(s) as shown in figure 34.

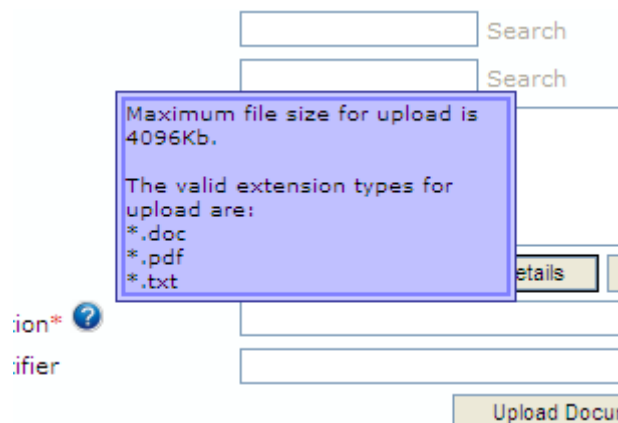


Figure 35: Manual Document Upload tooltip

Having Selected 'Upload Document' the file selected will undergo validation and display an appropriate message if it fails validation. If the file passes validation then it will be uploaded into SCI Store. The user will be redirected to the Patient Details screen for the current patient, focus will be set to the document tab containing the document just uploaded and the following message will be displayed:

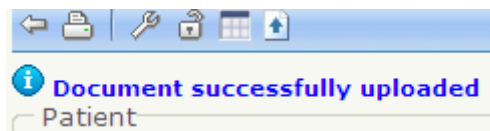


Figure 36: Manual Document Upload success

### 5.12.5 Point In Time View

This displays basic information for a patient at a specific time in the past. When the page is initially loaded Current Patient Details are displayed as highlighted in figure 35, point 1.

To generate the point in time view:

- Enter the required date and time as highlighted in figure 35, point 2
- Click on the Go button.

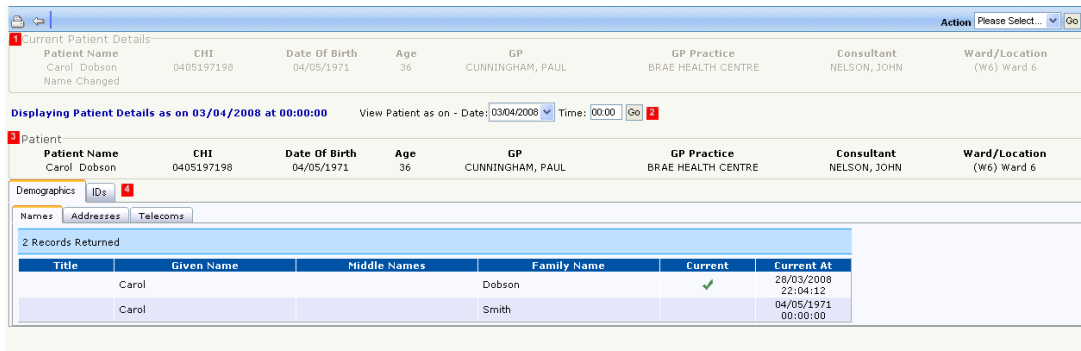


Figure 35: Point in Time View

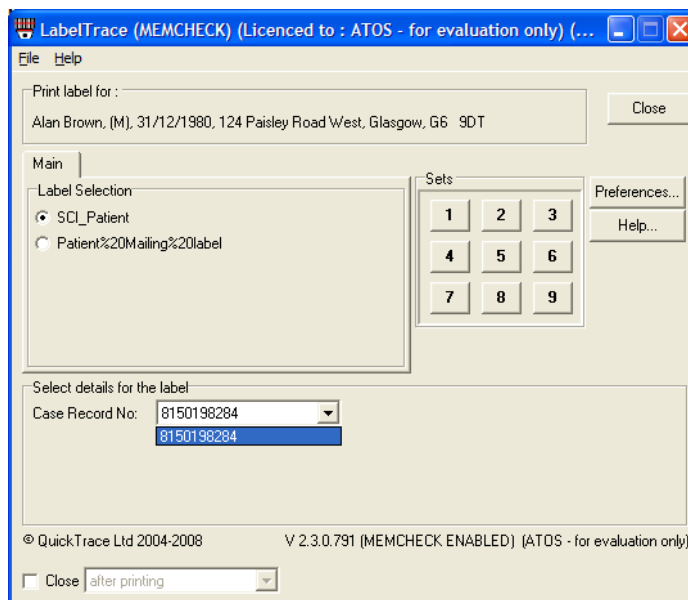
Historical patient information is displayed as shown in figure 35, point 3. Whilst historic demographic details and patient ids should be returned as shown in figure 35, point 4.

If a date is entered prior to the patient being added to the SCI Store a message such as **Patient was not added to Store until 28/03/2008 at 22:04:12** will be displayed.

### 5.12.6 Print Label

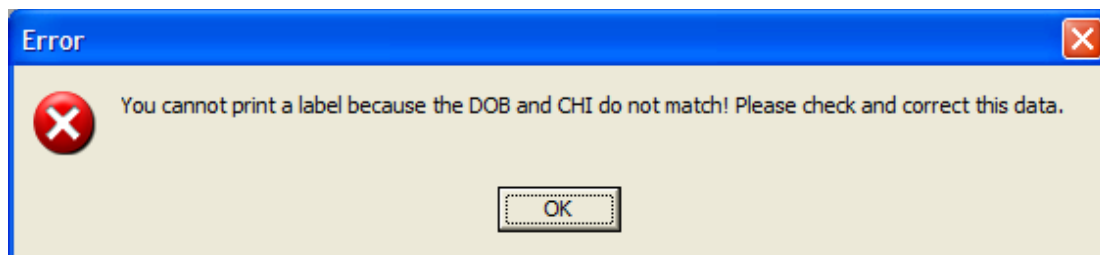
This allows the user to print off a Patient label of the current patient. This requires the LabelTrace software supplied by QuickTrace Ltd. to be installed on the user's PC and also a connection to a specialised label printing printer.

The LabelTrace print dialog window is shown below:



To print a label from this dialog select a case record number from the drop down list and then click on a numbered button corresponding to the amount of copies of the label you wish to print.

If the patient you wish to print a label for has an invalid CHI (i.e. it does not match the Date of birth) then the error message below will appear and the label will not be printed.



**Note:** The Print Label option requires the system setting 'ShowLabelPrintButton' set to 'True'. Contact your SCI Store administrator if you require this functionality enabled for your account.

### 5.12.7 Printer Friendly

A printer friendly version of the selected tab on the Patient Details screen is displayed. The current user details and the date and time will also be added to the report.

Click on the Print button to print this page. A printer dialogue box will appear. Select the relevant printer details and click on the print button.

To exit this screen and return to the Patient Details screen click on the Return button.

### 5.12.8 Refresh Demographics From CHI

The demographics will be updated from the current CHI database based on the patient's CHI number. A message is displayed to show that the demographics have been refreshed and the new details will be displayed.

### 5.12.9 Save To Store

When viewing a CHI patient via the CHI remote source, you can import it into Store with this option. If a matching patient exists in store, the demographics will be updated, otherwise a new patient will be added with those details. In either scenario, you will be redirected to the Store patient. A message will be displayed to indicate whether an insert or update has occurred.

### 5.12.10 Test Match

When viewing a CHI patient via the CHI remote source, you can use this to see what will happen if you click the Save To Store option. If a match is found, some details of the matching store patient will be displayed with a message to indicate an update will take place. If no match is found, a message is displayed indicating that an insert will occur.

### 5.12.11 View History

Displays a history of any updates made to the current patient information.

### **5.12.12 View Merges**

For a merged patient this will display a summary of any child patients associated with the current patient.



## 6 Result Details

### 6.1 Overview

Patients' results are displayed on this page. The general structure is displayed below (figure 36a & 36b). This consists of the standard toolbar containing navigation buttons linking to the Next, Previous, First and Last items in the result list, whether navigating from the Find Results page or the Patient Details page.

The standard Patient information is displayed above the result information (Figure 36a point 2), with general report information, such as Discipline and Sample Type, shown on the left hand side of the screen (Figure 36a, point 3).

To the right of the Report information is the test result information. Based on the Result Display mode this can show multiple result sets from the same sample (Grouped Mode - Figure 36a) or a single result set (Ungrouped - Figure 36b)

When grouped by sample the structure will be as follows

- Information from each result set in the structure:
  - Result set name (figure 36a, point 4)
  - Result set status (figure 36a, point 5)
  - Result set information, such as authorising clinician (figure 36a, point 6)
  - Test results. This can be numeric results with a value & range etc or simply textual results (figure 36s, point 7)
  - Comments relating to the result set (figure 36a, point 8)
  - Comments relating to test results. The test code is used to relate a comment to a specific result. (figure 36a, point 9)
  - Test result attachments (figure 36b, point 3)
- Comments relating to the report
- Comments relating to the sample (figure 36a, point 10)
- Comments from the report requestor (figure 36a, point 11)

Last Accesses Summary is same as mentioned in Patient Details page ([Section 5.3.3](#)). This last accesses summary is for result record (Figure 36a, point 13, and 36b point 4)

The Ad Hoc Cumulative Report button (figure 36a, point 14) will only be visible if the user has the cumulative report module permission and the result set contains numeric test results.

The screenshot displays the 'Result Details' page in the SCI Store Paisley application. The page is organized into several sections:

- Navigation and User Info:** At the top, there are navigation links (Home, Find Patient, etc.) and the user's name 'admin on PJSSC16'.
- Patient Information:** A table showing patient details:
 

Patient Name	CHI	Date Of Birth	Age	GP	GP Practice	Consultant	Ward/Location
Dave Edwards	0504567713	05/04/1956	54	HOIDA, ELLEN	UNST HEALTH CENTRE		
- Report Summary:** A section for the 'Current Report' (FBC) with a 'Cumulative' button. It includes:
  - Report Requestor:** AARON, DAVID
  - Requestor Location:** (R1E107) (R1E107) R1E Ward 107
  - Report Identifier:** H03,08058012.G
  - Discipline:** WGH Haematology
  - Sample Type:** Blood
  - Sample Collected:** 13/02/2007 13:45:00
  - Sample Received:** 13/02/2007 15:48:00
  - Referral Source:** Inpatient
  - Processed Into Store:** 08/02/2011 11:51:25
  - Quick Links:** All Results for Patient
- Test Results Table:** A table with columns for Description, Value, Range, Unit, and Normalcy Notes.
 

Description	Value	Range	Unit	Normalcy Notes
White Blood Count	13	10.5 - 19.0	units	(WBC)
Platelet Count	250	150 - 400	$\times 10^9/L$	HI (PLC)
Mean Cell Volume	90	80 - 100	fL	
Base Excess	-2	-3 - -2	mmol/l	
Blood Eval	Blood was Red			
- Lipids Section:** Includes 'Authorised By', 'Author Date of Reporting', 'Author', 'Date of Reporting', 'Typist', and 'Date of Typing'.
 

Description	Value	Range	Unit	Normalcy Notes
Cholesterol	>4.2	> 3.6 - < 5.2	mmol/l	(CHL)
- Comments:** Sections for 'Set Comments', 'Test Comments', 'Sample Comments', and 'Requestor Comments' with specific text for each.
- Last 4 users to access this result:** A table at the bottom:
 

Name	System	Location	Time
Mr Nunit User	PJSSC16	SCI Store Paisley	04/02/2011 23:14:58
WS Unit Test	Store60Test	Unit Test	04/02/2011 23:11:22
WS Unit Test	Store41Test	Unit Test	04/02/2011 23:01:58

Figure 36a: Result Details Grouped

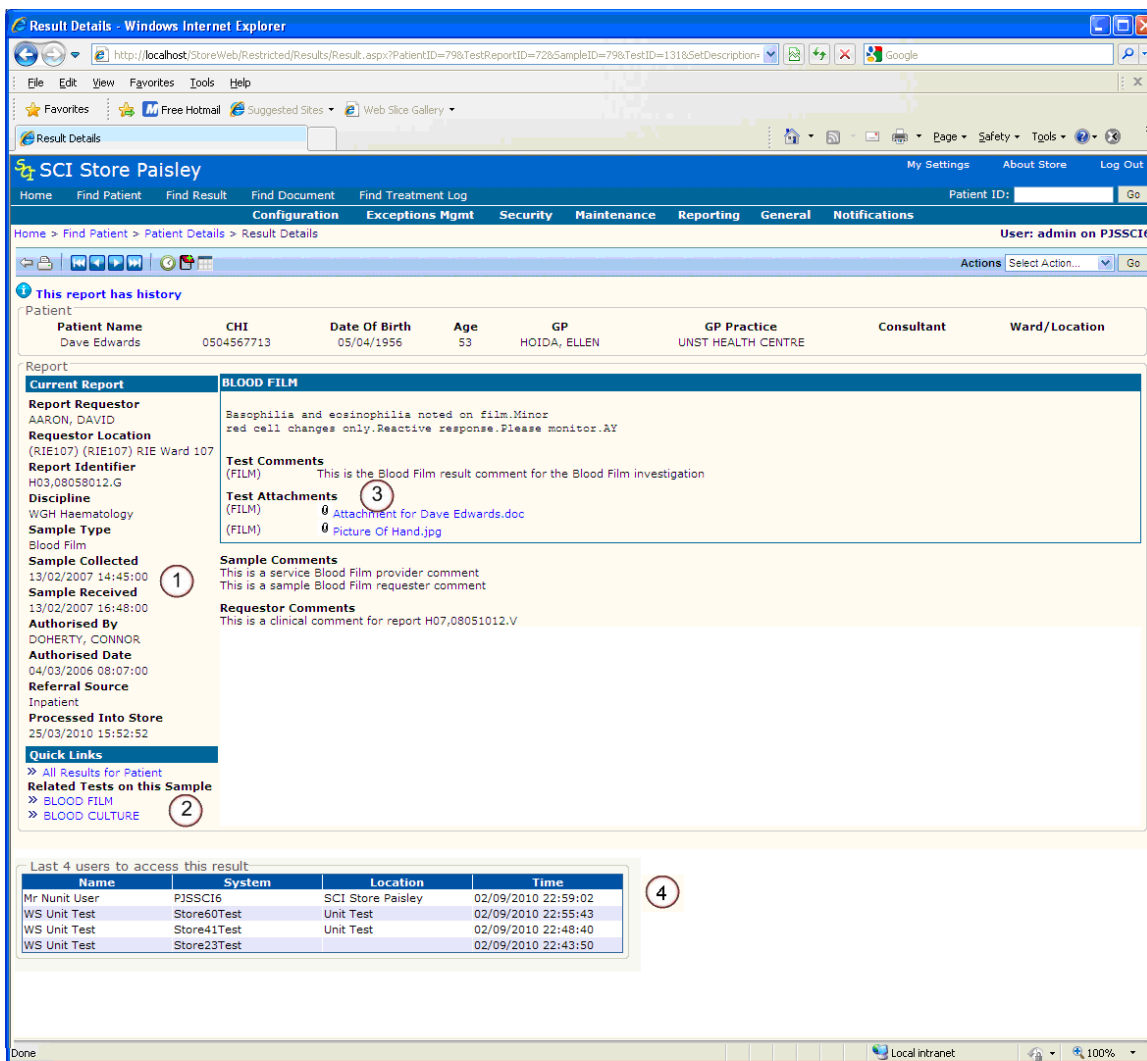


Figure 36b: Result Display Ungrouped

If results are ungrouped only one test result set will be displayed per page. In this situation the Result Set Information such as authorising clinician and authorised date will be displayed on the left with the Report Information (figure 36b, point 1)

## 6.2 Quick Links

The Quick Links area of the page allows users to:

- Quickly navigate to the Results Tab of the Patient Details page by clicking on the “All Results for Patient” link when in “Grouped” display mode (figure 36a, point 12) OR
- Navigate to a specific test for the current sample by clicking on any of the links under the “Related tests on this sample” section when in “Ungrouped” mode (figure 36b, point 2).

## 6.3 Actions

Actions can be triggered by selecting the appropriate action from the dropdown list and clicking on the Go button.

### **6.3.1 Audit**

The Audit Action displays a list of users that have viewed a particular test report.

### **6.3.2 Cumulative report**

This is a cumulative view of reports against a patient filtered on search criteria entered by the user.

See section 5.9.3 for more information on Cumulative Reporting.

### **6.3.3 Printer friendly**

A printer friendly version of the current view of the test report is displayed. The current user details and the date and time will also be added to the report.

Click on the Print button to print this page. A printer dialogue box will appear. Select the relevant details and click on the print button.

To exit this screen and return to the Result Details screen click on the Return button.

### **6.3.4 View/Add Note**

This action will open a new Result Notes pop up screen.

- Notes can be added against a result to record any additional information the user may deem necessary.
- Notes cannot be deleted. An audit trail is held of all notes, time/date stamped and user id.
- To add notes type text in the bottom half of the screen, then click on the Save button.
- Previously added notes will be displayed in the top half of the screen.

### **6.3.5 View History**

Displays a history of the updates made to the test report being viewed.

### **6.3.6 Ad Hoc Cumulative Report**

The Cumulative button found on the Result Set header will navigate the user to the Ad Hoc Cumulative Report page. Here they will be shown a cumulative view of the numeric results contained within the selected result set. For more information please see section 7 below.

## 7 Ad Hoc Cumulative Report

### 7.1 Overview

The Ad Hoc Cumulative report function was added to v7 after a request from users to simplify the existing cumulative report function. To access this function a user simply clicks the “Cumulative” button in the header of the result set they wish to cumulate on. This appears on the Result Details page. They are then presented with a cumulative view of the numeric tests existing in that report, as seen below.

The page displays the following:

- Results are displayed in a grid with tests on the Y-axis and dates in descending order along the X-axis
- Next and Previous buttons are used to show later or earlier results (point 1 below)
- A select tests button (point 3 below) allows the user to select or deselect the tests that are displayed in the grid. Only tests that existed in the result set selected in the result details page will be selectable.
- Where code of tests match but they differ in either range or units then 2 lines will be created in the grid. The range and units will then be displayed along with the test description (point 2 below).
- Where comments exist against the test result then an \* will appear next to the test result value (point 4 below). If comments exist against the set, sample or report then an \* will appear next to the date column header.
- If a test result fails the normalcy checks then the result will be displayed in bold red text (point 5 below)

**Cumulative Report**

Legend: Associated Comments = \*, Abnormal Result = red

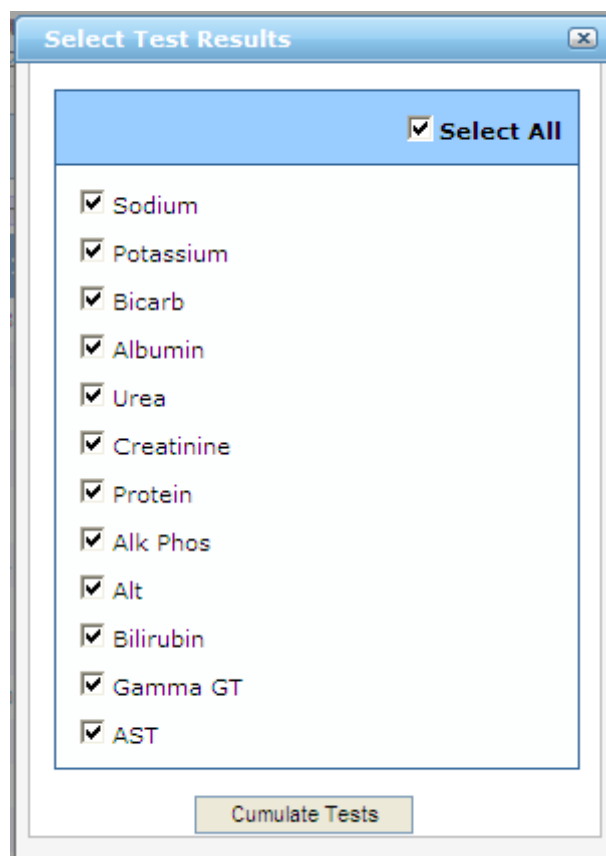
TEST	15/12/2004*	14/12/2004	13/12/2004	12/12/2004	11/12/2004	10/12/2004
Sodium	138	138	138	146	138	138 *
Potassium	3.5	3.5	3.5	4.9	3.5	3.2
Bicarb	25	26	25	25	25	25
Albumin 37 - 50 g/l	45	45 *	45			45
Albumin 37 - 55 g/l					45	
Urea	5.4	5.0	5.4	5.4	5.4	5.4
Creatinine	83	83	83	83	83	83
Protein	80	80	75	80	81	80
Alk Phos		312	250	326	326	72
Alt		14	32	14	14	42
Bilirubin	20	20	20	20	20	22
Gamma GT	35	35	35	35	35	36
AST	21	21	21	21	21	21

## 7.2 Data Points

The number of Data Points displayed – i.e. the number report columns – is controlled using the CumulativeDataPoints system setting. This setting can be set between 2 and 10. The default is 6 as shown above.

## 7.3 Selecting Tests

Clicking the Select Tests button (point 3 above) will display a popup that will allow the user to select or deselect the tests that displayed in the cumulative grid. By default all tests are selected and displayed when first entering the page.



## 8 Document Information

This screen displays information relating to a particular document for a patient.

- General document information is displayed on the left hand side of the screen (figure 37, point 1).
- Some document Metadata is displayed in the centre of the screen, giving some general details relating to the document (figure 37, point 2).
- If any notes exist for the current document they will be displayed at the bottom of the screen (figure 37, point 3).
- If the current document has history a message will be displayed as in figure 37, point 4, to let the user know.
- Last Accesses Summary is same as mentioned in Patient Details page ([Section 5.3.3](#)). This last accesses summary is for Document record (Figure 37 point 7)

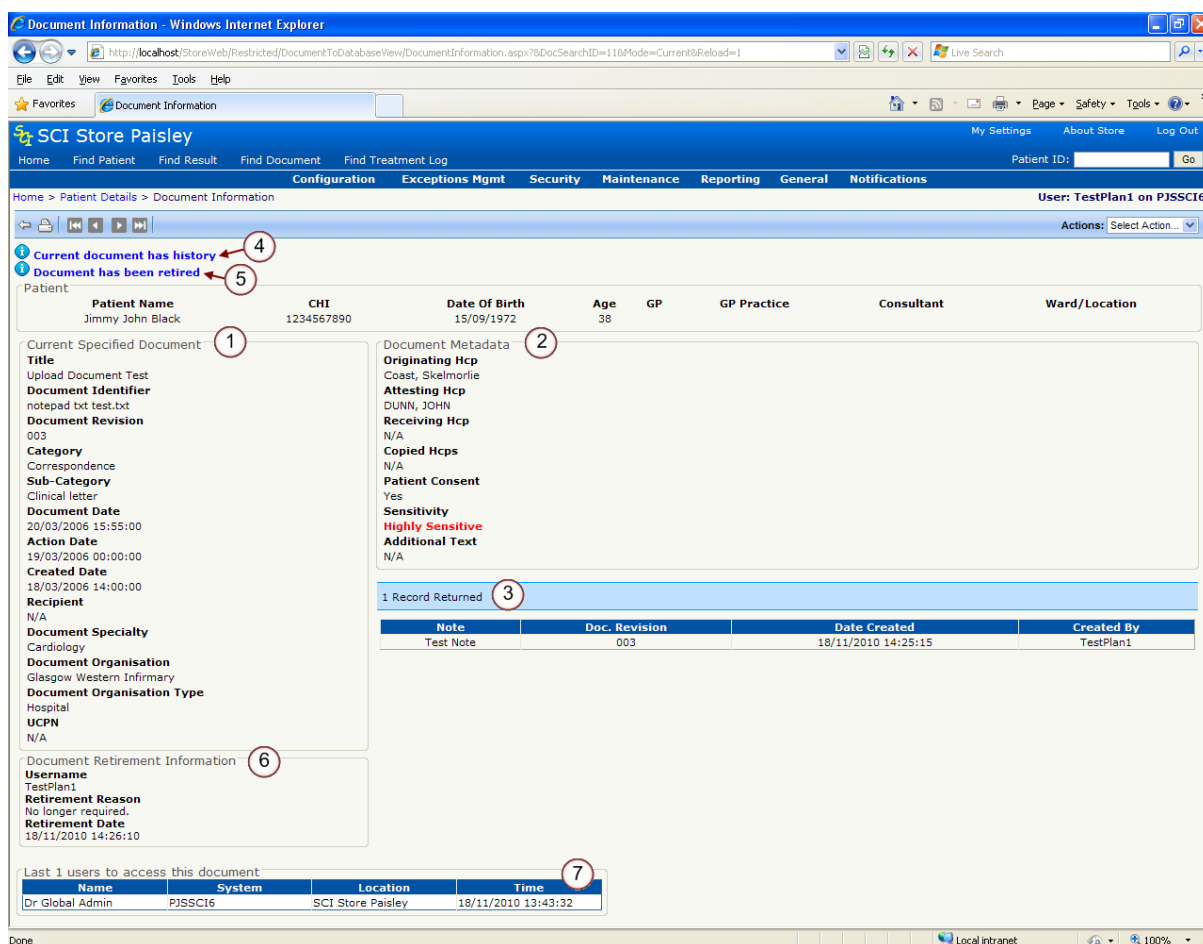


Figure 37: Document Information

If more than one document exists for a patient the user can navigate through them using the navigation buttons at the top left of the screen. These buttons are explained in more detail in section 6.1.



## **8.1 Actions**

### **8.1.1 Manual Revision Upload**

For the Manual Revision Upload action to be available four preconditions must be met:

- The current document must have been manually uploaded
- The view mode must be 'current', i.e. the latest revision on file
- A Manual Document Upload interface must be configured and set as active
- The document must not be retired

For details on manually uploading documents in SCI Store see section 5.10.4 'Manual Document Upload'.

### **8.1.2 Printer Friendly**

A printer friendly version of the current view of the document information is displayed. The current user details and the date and time will also be added to the report.

Click on the Print button to print this page. A printer dialogue box will appear. Select the relevant details and click on the print button.

To exit this screen and return to the Document Information screen click on the Return button.

### **8.1.3 Retire Document**

A document may be marked as retired to highlight that it is no longer a current document.

When a user tries to retire a document they will be prompted to enter a reason for retiring the document. Enter a reason and then click on the Proceed button.

Once it has been retired the Document Information screen will display the message "Document has been retired" as highlighted in figure 37, point 5. A Document Retirement Information section will also appear on the Document Information screen, detailing who retired the document, the reason and the date and time of retirement. (Figure 37 point 6.)

### **8.1.4 View Audit**

The Audit Action displays a list of users that have viewed particular document information.

### **8.1.5 View Document**

This action displays the actual clinical document that is held by the SCI Store. Once the Go button has been clicked this document may appear on the screen automatically or the user may be given the option to Open or Save the document.

### **8.1.6 View/Add Note**

Notes can be added against a document to record any additional information the user may deem necessary. To add a note the user should type text in the box provided and then click on the Add Note button. Any notes that have been added to the

document will be displayed at the bottom of the document information page. (Figure 37, point 3)

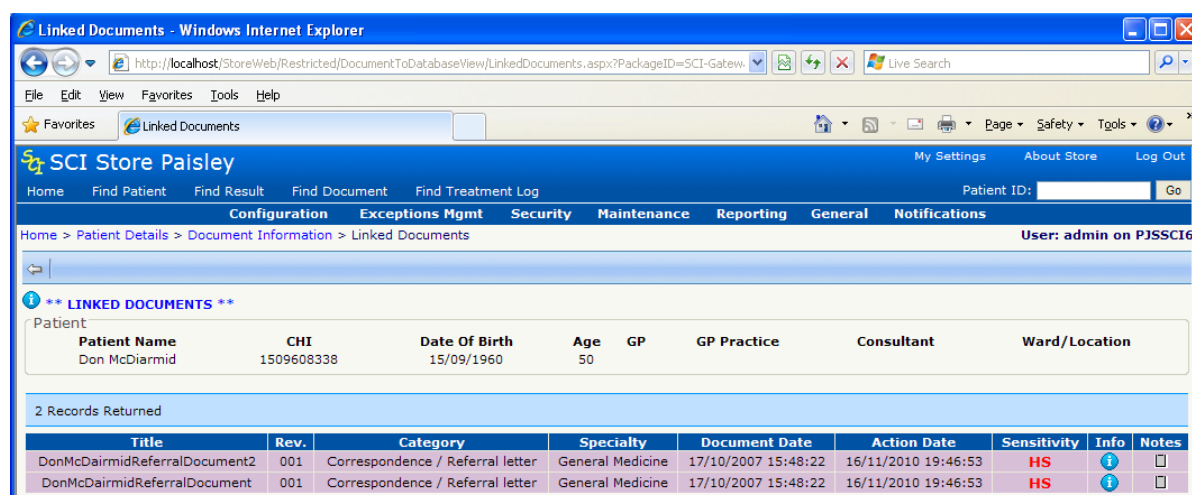
Please note that Notes cannot be added to documents that have been retired.

### 8.1.7 View Linked Documents

This action is available if the document is linked to other documents. It takes you to the Linked Documents page. (See section 7.2 for further details)

## 8.2 Linked Documents

This screen displays a list of linked documents for the current patient.



A number of options are available from the documents grid:

- View additional document information by clicking on the 'Info' icon.
- The document can be viewed by clicking the **View** link.
- A note can be added to the document by clicking the **Add Note** icon. (see section 7.1.5 for more details)
- The document can be viewed by clicking anywhere else on the row; the entire row will be highlighted. (See section 7 for more details)

## 9 My Settings

### 9.1 Overview

The “My Setting” link is accessible from the right-hand side of the blue heading banner.

This area of the system allows user to customise the setup of their homepage. As well as maintain their password and user questions. The user should click on the relevant link to take them to each of the areas described below.

### 9.2 User Customisation

This area allows users to configure the recently viewed and recently created areas on the home page (see section 3). Users can define how many recently created patients, results and documents are displayed at a time. As well as adjust how long recently created patients, results and documents are displayed for.

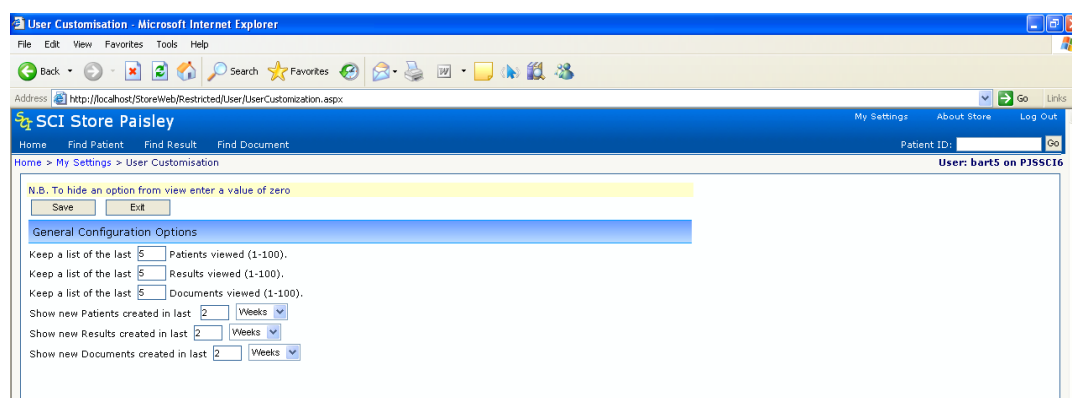


Figure 38: User Customisation

To do so the user should fill in the appropriate text boxes and click on the Save button (see figure 38 above).

To clear the display for the recently created and recently viewed areas enter ‘0’ into the relevant text box and click Save.

### 9.3 Change Password

This area allows users to change their own password. The user should:

- Enter their current password in the first text box
- Enter their new password in the second text box.
- Retype their new password in the third text box.
- Click the Save button

NB:

- New passwords cannot be the same as previous passwords
- All passwords must contain at least one numeric character
- All passwords must be between 6 and 10 alphanumeric characters long.

## 9.4 Maintain User Questions

This screen allows users to manage their own user security questions. These questions are required when using the Password Reset functionality (see section 2.3).

### 9.4.1 Set user questions for the first time

When setting up these questions for the first time three questions require to be completed.

To save these questions:

- Select a question from the dropdown list
- Enter the appropriate answer
- Once three questions and answers have been completed click on the Save button.

### 9.4.2 Change user questions

Once security questions have been setup, users have the option to change these questions from within the Maintain User Questions screen.

A minimum of three questions must be setup at any one time.

To add a new question:

- Select a question from the dropdown list
- Enter the appropriate answer
- Click the Add button

To delete an existing question:

- Click on the delete button next to the appropriate question
- A pop up box will appear asking you “Are you sure you want to delete this item?”
  - ⇒ Click OK to delete the question; or
  - ⇒ Cancel to keep the question.

Note: A question can only be deleted if there will still be three questions remaining in the list.

## 9.5 User Requestor Groups

This area allows users to configure User Requestor Groups so that they can be used in viewing Recently Requested Results on the Home page (see section 3.5.2).

Requestor Groups consist of 1 or more Health Care Professionals (HCPs). Groups can be set up to represent an individual HCP (consultant, GP etc) or a group of HCPs. This group of HCPs could represent something like a clinic or ward.

The user would then use these configured groups on the front page to display a list of Results that have been requested by one of the HCPs in the Requestor Group.

To enable this function the user must first be assigned the “Recently Requested Results” Module Permission.

The User Requestor Groups page (figure 39) displays a list of the groups currently configured for the user. From here the user is able to add a new group, edit an existing group and delete an existing group.

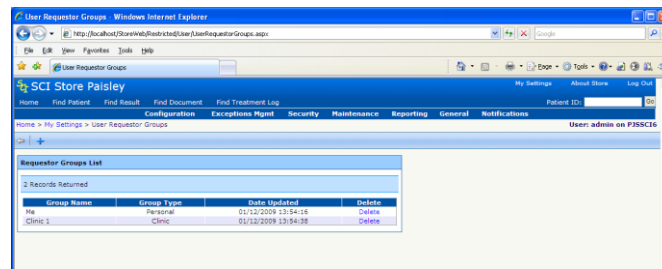



Figure 39: User Requestor Groups

To add a new Requestor Group

- Click the  on the User Requestor Groups page to navigate to the Add Requestor Group page (figure 40)
- Enter a Group Name
- Select a Group Type
  - **NB** a user is only allowed to configure one group of type “Personal”
  - The “Personal” type is meant to represent the HCP entries that correspond to the user (Due to data quality issues, there may be more than one HCP entry for each clinician)
- Click the Save button

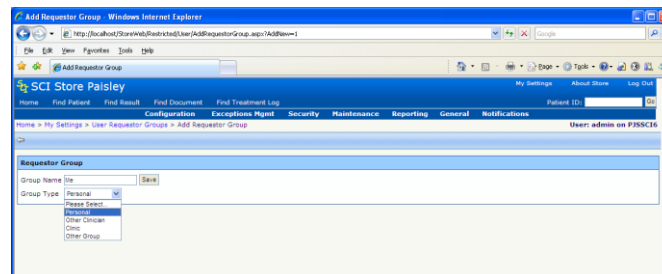


Figure 40: Add Requestor Groups

To Add HCPs to a Requestor Group

- Click on the Group in the Requestor Groups List (figure 39) to navigate to the Edit Requestor Group page (figure 41)
- Click Select HCPs. A popup should be show.
- In the Clinician Name field enter a clinicians’ name or a partial name
- You should then be presented with a list of HCPs that match the name entered.
- Click Select to add the HCP into the Requestor Group

- If successful a message will be displayed. The popup will remain open in case the user wants to add more than one HCP from the returned list. (figure 39)

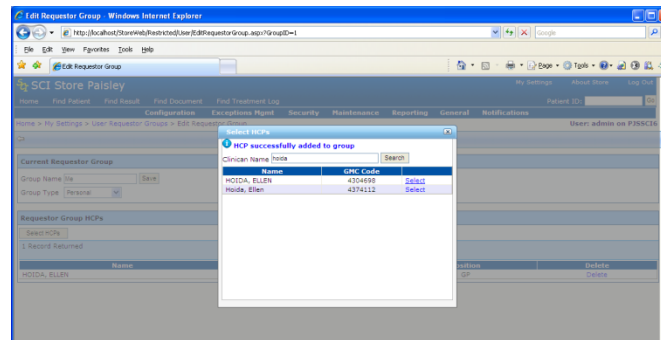


Figure 41: Edit Requestor Group

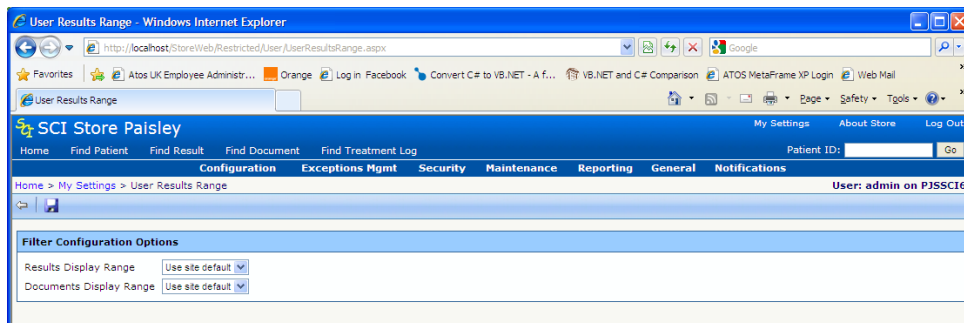
To remove an HCP from the Group, click the Delete link in the relevant row. A user will be asked to confirm the deletion.

## 9.6 User Results Range

This area allows a user to configure the default values used in the filters on the patient results list and the patient documents list.

Users can select to default to view results/documents from Today, the last 7 days, the last 14 days, the last 30 days, or all results. Users can also select to “Use Site Default”. Selecting this option will result in the value being taken from the relevant System Setting

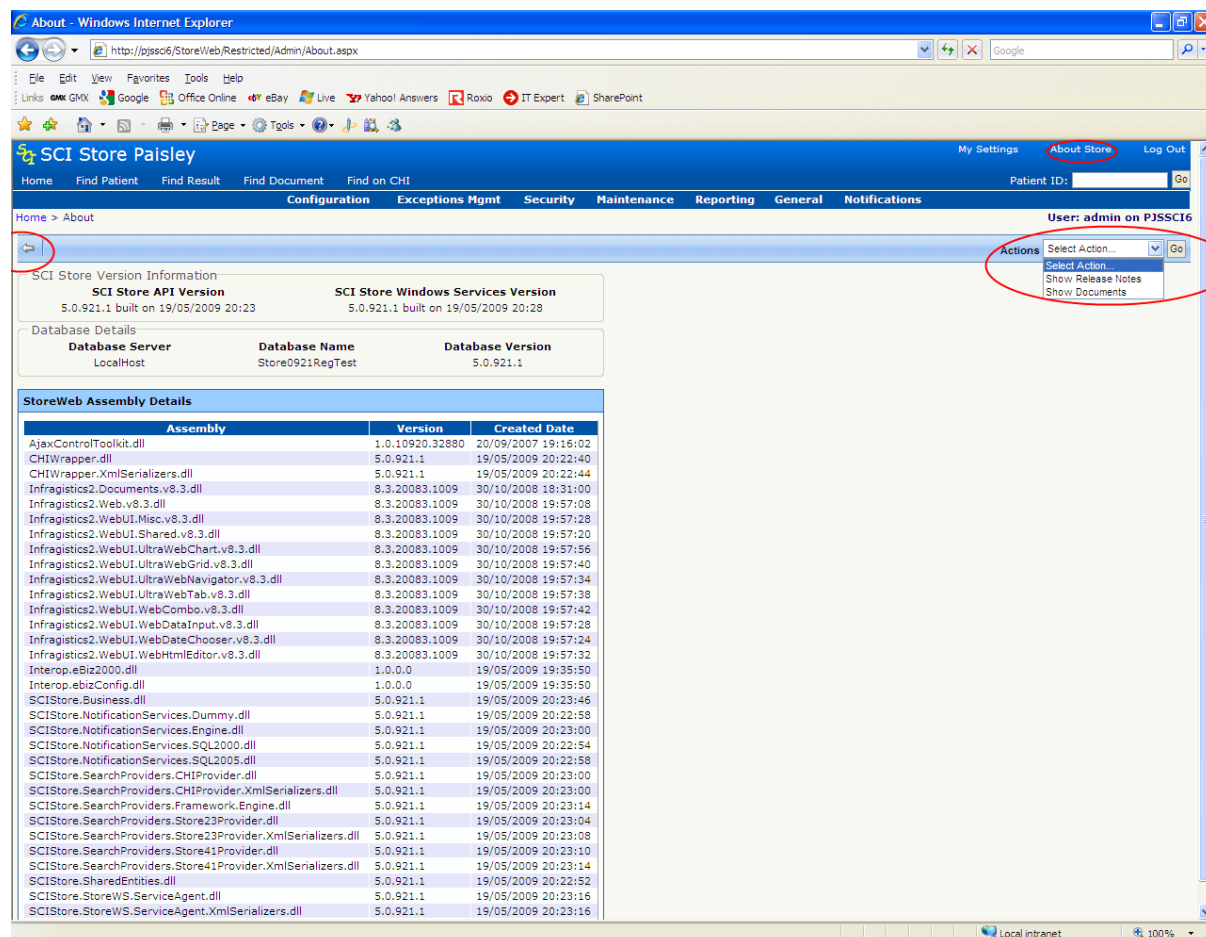
- DefaultResultsDisplayRange
- DefaultDocumentsDisplayRange



## 10 About Store link

### 10.1 Overview

The “About Store” link is accessible from the right-hand side of the blue header banner.



### 10.2 Technical information

This screen lists technical information about the current version of SCI Store and database. This includes:

- SCI Store API Version
- SCI Store Windows Services Version
- SCI Store Build version and date
- Database Server
- Database Name
- Database Version

### 10.3 Actions menu

The Actions menu has the following functions:

- Link to *Release Notes* - list of new features and known issues related to each particular build of SCI Store.
- Link to product documentation “<http://www.sci.scot.nhs.uk/products/store/>”

## 10.4 Toolbar

The *About Store* page has the following links on the toolbar:

- *Back Button* “

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## Appendix A – Normalcy Rules

Normalcy rules are applied in Store to enable the user to easily see if a Test Result is abnormal, or if a Sample or Result Set/Investigation contains an abnormal Test Result. These rules are applied throughout the application when displaying results or when displaying lists of results. The following pages are affected:

- Home page
  - Recently Viewed Results
  - Recently Created Results
- Find Results
- Patient Details
- Result Details

A result is judged to be abnormal based on the following rules:

- For results input from lab systems sending results to Store in the **Telepath** format:
  - If the normalcy indicator sent in the file is “+” or “-“ then the result is abnormal
- For results input from lab systems sending results to Store in the **HL7v2** format:
  - If the normalcy indicator is one of the following values then the result is abnormal
    - "L", "H", "LL", "HH", "<", ">", "A", "AA", "S", "MS", "VS", "R"
- For results input from other lab systems
  - If the normalcy indicator is populated and is one of the following values then the result is abnormal
    - “HI”, “LO”, “OR”
  - If the normalcy indicator is not populated then the result value is checked against the supplied reference range. If it is out-with this reference range then the result is abnormal

## Document control

### Document information

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