

SCI Store

Exceptions Management 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 summary of the exceptions management functionality within the SCI Store application.

1.1 Intended Audience

This document is intended for the SCI Store Administrator role who will use the exceptions management functions in SCI Store.

1.2 Scope

The document provides a description of the SCI Store exceptions management functions.

2 Uploaded files search

2.1 Overview

The **Uploaded Files** search screen is accessed by navigating to the **Exceptions Management** menu and selecting **Uploaded Files**.

This function allows the user to search for and display messages that have been processed by the various FiletoDatabase services that have been set-up in SCI Store. This means that an administrator user can inspect the various messages for errors and for auditing purposes.

If an interface uploads a file into Store that contains a batch of messages, then this will create a single Source message. This Source message will then be processed into the relevant number of Split messages.

If an interface uploads a file into SCI Store that contains a single message, then this will create a single Split message. In this scenario no Source message will exist for this file.



2.2 Searching

To conduct a search, enter some of the following selection criteria and click **Search**:

- View messages select whether to search on Source messages (pre-split) or Split messages (post-split)
- Source System select which interface to search against
- File Name enter the file name

- Processed indicates the stage of processing that is relevant; not processed (New), processed (OK) or pending (Processing)
- Status indicates the status of the record after processing (Actioned, All Errors, New, OK, Parse Error and System Error – see <u>Appendix A</u> for definitions)
- Description searches the message description field
- Date Processed From date to search from
- Date Processed To date to search to

When performing a search it is advised that other than the "View Messages" and "Description" fields at least one other search criteria should be provided. Running a search based on these two fields alone is likely to have an adverse effect on the overall performance of SCI Store. This type of search will result in a dialog box being displayed informing the user of this and prompting them to continue by clicking on OK or stopping the search by clicking on Cancel.

Note: If this occurs it is advised that you should select Cancel and amend your search criteria.



Once a successful search has been completed, the results are displayed in a grid as shown over the page.

2.3 Actions

Various actions can be carried out on these messages by selecting the relevant action from the File Actions drop down list and clicking on Go. The available actions are as follows:

- Export: This exports the messages returned to an Excel spreadsheet.
- **Flag as Actioned**: This assumes some sort of user action has been carried out. For example, the user has viewed the record and concluded that there is nothing that can be done to the file and therefore should not be considered as an "Exception". This action can only be carried out on messages that do not have a status of "OK".
- Performing this action on messages with a status of "OK" will result in the following message being displayed, "nn files have been processed previously". The status of these messages will not change.
- Flag as New: The message will be processed by the FileToDatabase service again.

• **Printer Friendly:** Will display the messages returned in a printer friendly format.

Uploaded Files	- Microsoft Internet Explo	orer									
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earch Options	Search Liear	29 Records Returned	Records Per Page 20 View All			nie Actions Select Action Y Go					
ew messages ource System	Telepath	ID Service	File Name	File Date	Processed Status	Description					
e Name		97 TelepathFile2DB	IDFormat_nunit.tlp	27/05/2009 22:52:29	ок ок	Completed successfully 27/05/2009 22.52.47					
ocessed	~	96 TelepathFile2DB	scheme_nunit.tlp	27/05/2009 22:51:21	ок ок	Completed successfully 27/05/2009 22.51.27					
atus		95 TelepathFile2DB	local_scheme_nunit.tlp	27/05/2009 22:49:28	ок ок	Completed successfully 27/05/2009 22.49.46					
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		91 TelepathFile2DB	Testgroup_4_MundidConsultreq.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		90 TelepathFile2DB	Testgroup_4_GPreq.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009 22 13 28					
		89 TelepathFile2DB	Testgroup_4_Consultreq.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		88 TelepathFile2DB	Telepath_TestResult_Path_Update.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		87 TelepathFile2DB	Telepath_TestResult_Path.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		86 TelepathFile2DB	Telepath_TestResult_Micro_Update.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		85 TelepathFile2DB	Telepath_TestResult_Micro.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		84 TelepathFile2DB	Telepath_TestResult_Haemat_Update.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		83 TelepathFile2DB	Telepath_TestResult_Haemat.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		82 TelepathFile2DB	Telepath_TestResult_Bloodfilm_Comments Updated.tlp	27/05/2009	ок ок	Completed successfully 27/05/2009					
		81 TelepathFile2DB	Telepath TestResult Bloodfilm Comments.tlp	22:11:08	ок ок	Completed successfully 27/05/2009					
		80 TelepathFile2DB	Telepath TestResult Biochem Update Two.tlo	22:11:08	ок ок	Completed successfully 27/05/2009					
		79 TelepathFile2DB	Telepath TestResult Biochem Update Three.tlp	22:11:08 27/05/2009	OK OK	22.13.08 Completed successfully 27/05/2009					
		78 TelepathFile2DB	Telepath TestResult Biochem Undate In	22:11:07 27/05/2009	OK OK	22.13.08 Completed successfully 27/05/2009					
		12		22:11:07	OK OK	22.12.02					
		-									

Clicking on the **Clear** button will clear the search results and criteria and restore the search defaults.

Two types of search can be run on this page:

- Searching on pre-split messages, by selecting the "Source" option from the "View Messages" dropdown list.
- Searching on split messages, by selecting the "Split" option from the "View Messages" dropdown list.

When a user clicks on one of the messages returned by a search depending on the type of search performed they will be redirected to:

- The "File To Db Details" page (shown over the page), for a "Source" message search; or
- The "Split File To Db Details" page, for a "Split" message search.

2.3.1 File to Db Details (Source message screen)

On the **File To Db Details** page a range of information is displayed including the status of the source file, how many messages it was split into and how many of those have been processed. In addition, if the file has been split, it is possible to navigate to individual split messages by selecting the relevant message from the **Go to split message** dropdown list and clicking on the **Go** button.

If more than one message has been returned by a search, a user can navigate between the source files that were returned by using the standard navigation icons at the top left of the screen.

It is also possible to perform the following actions on an individual source file, by selecting the relevant action from the **Actions** dropdown list and clicking on **Go**:

- **Flag as actioned**: This can be performed on any source file that doesn't have a Status of "OK", giving the message a status of "User Actioned".
- **Flag as new**: The message will be flagged with the **Status** of **New** and then processed by the FileToDatabase service again.
- **Split Message**: The source file will be split manually; this option is only available for messages that have not been split previously.

File to DB Details - Micros	oft Internet Explorer			- 7 🛛					
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SCI Store Paisle	ey		My Setting	s About Store Log Out 📥					
Home Find Patient Fin	d Result Find Document Find on CHI			Patient ID: G0					
	Configuration Exception	s Mgmt Security Maintenance F	Reporting General Notifications						
Home > Uploaded Files > File :	to DB Details			User: admin on PJSSCI6					
				Actions Select Action V Go					
🛈 This message was split	into 4 messages, 4 of which have been proces	sed.							
File To Database Details	5 TelenathFile2DB	Processed	OK						
Status	OK	Status Description	Completed successfully 27/05/2009 22 52 47						
Status Date	27/05/2009 22:52:47	File Date & Time	27/05/2009 22:52:29						
Filename	IDFormat nunit.tlp	Last Updated	27/05/2009 22:52:47						
File Path	d:\Reg_Interface\Telepath\FullFiles	Date Created	27/05/2009 22:52:47						
Split Message									
Go to split message	90								
Message				*					
Original message trun	cated for display								
01 PATHREP 001 HAE 7	5895 11.06.02 12:30								
02 \$\$\$ 61 L			44 40751						
04 P1 Dr F Peacoc	89444 023443 01.11.1975 1 High Street	GIASGOW G4 UNG 7533325111 U1.	11.1975						
05 R,02.0083024.N B B	lood 12.06.02 15:54 RTN 12.06.02	1							
06 1									
23 FBC FBC MC 12.06	.02 16:39								
25 FBC WBC WHITE BLOO	NI3.241x10^12/L -14.50-6.5014.30-6.70	-11.0[[[[]							
25 FBC HGB HAEMOGLOBI	N N 106 g/L - 130-180 130-180								
25 FBC HGB HAEMOGLOBI	N N 199 g/L - 150-200 150-2000								
25 FBC PCV PACKED CEL	L VOLUME N 0.306 L/L - 0.400-0.540 0.3	380-0.560							
251FBCIMCHIMEAN CELL	HAEMOGLOBIIN132.61pg1+127.0-32.0126.0	-34.01111							
25 FBC PLT PLATELET C	OUNT N 103 x10^9/L - 150-400 150-400	(150 - 400)							
25 FBC NEUT NEUTROPHI	LS N 10.5 x10 ⁴ 9/L + 2.0-7.5 2.0-8.0	111							
25 FBC LYMPH LYMPHOCY 25 FBC MONOLMONOCYTES	TES N 1.06 x10^9/L - 1.50-4.00 1.00-4	.00							
201100100001100	1411.311X10 3/1110.20-0.0010.20-0.								
				~					

As mentioned previously, to navigate to a split message, select the appropriate number from the **Go to split message** dropdown list and click **Go**. The screen which follows will then be displayed. This same screen will be displayed when a "Split" message search is carried out on the "Uploaded Files" search screen.

2.3.2 Split File to Db Details (Split message screen)

This screen tells the user if a message has been parsed, along with other details such as the current message status, the original file name and message source

system. As with the "File To Db Details" screen, if more than one split message exists for a source file, the user can navigate through the split records using the standard navigation controls.

Using the Actions list the user can perform the following actions:

- **Flag as actioned**: This can be performed on any source file that doesn't have a Status of "OK", giving the message a status of "User Actioned".
- **Flag as new**: The message will be flagged with the **Status** of **New** and then processed by the FileToDatabase service again.
- **Go To Parsed Message**: Allows the user to navigate to the associated parsed message. The parsed message screen is explained in more detail in section 2.1.2.
- **Parse Message**: Parses the message (i.e. processes the message into Store).



3 Parsed Files Search (Parse From DB)

3.1 Overview

The **Parsed Files Search** screen allows the user to search for and display the messages that have been processed by the various TranslatorFromDatabase services that have been set-up in Store. These messages can then be inspected for errors as well as for auditing purposes.

🕽 Parsed Files - Microsoft Internet Explorer								
File Edit View Favorites Tools Help								A.
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Address 🕘 http://localhost/StoreWeb/Restricted/Services/Pars	seFromDbSearch.aspx							🔽 🔁 Go 🛛 Links 🌺
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SCI Store Paisley							My Settings Ab	out Store 🛛 Log Out 🙆
Home Find Patient Find Result Find Docume	ent Find on CHI						Patient ID	Go
Con	figuration Exception:	Mgmt Sec	curity Mair	ntenance F	teporting Gen	eral Notif	ications	
Home > Parsed Files							Us	er: admin on PJSSCI6
Search Options Search Clear	94 Records Returned	Records Per P	age 20 💌 V	View All			File Actions	Select Action 💌 Go
System Search Options	12345							
Source System	ID Service Name	Source System	Patient	СНІ	Report Id	Status	Description	Transaction Date
Service Name	257 TelepathTranslator	Telepath	John Brown	7533325111	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:55:01
CHI Matched?	256 TelepathTranslator	Telepath	John Brown	7533325111	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:53:19
Description	255 TelepathTranslator	Telepath	Sarah Paterson	3656472444	R,02.0087145.Y	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:35:02
Transaction Date:	254 TelepathTranslator	Telepath	David Preece	3639462333	R,02.0087145.Y	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:35:01
Transaction Date:	253 TelepathTranslator	Telepath	Alison Black	7830135222	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:35:01
Match Rule	252 TelepathTranslator	Telepath	John Brown	7533325111	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:35:01
Match Action	251 TelepathTranslator	Telepath	Sarah Paterson	3656472444	R,02.0087145.Y	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:34:41
Bequestor Search	250 TelepathTranslator	Telepath	David Preece	3639462333	R,02.0087145.Y	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:34:41
Requesting Search	249 TelepathTranslator	Telepath	Alison Black	7830135222	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:34:41
Report Id	248 TelepathTranslator	Telepath	John Brown	7533325111	R,02.0083024.M	Patient Error	Patient Error: More than one Patier Match found	nt 28/05/2009 14:34:41
Patient Search Options	247 TelepathTranslator	Telepath	Chris Smith	3110805812	R,02.0087024.M	Match Error	Match Error: Exception Rule Match Satisfied	28/05/2009
Patient Id	241 TelepathTranslator	Telepath	Chris Smith	3110805812	R,02.0087024.M	ок	Processing Completed Successfull	y 28/05/2009 01:02:40
Forename	236 TelepathTranslator	Telepath	Chris Smith	3110805812	R,02.0087024.M	User Actioned	User Actioned	28/05/2009 00:47:22
Date of Birth	234 TelepathTranslator	Telepath	Alan Brown	3112198012	R,02.0083024.M	ок	Processing Completed Successfull	y 28/05/2009 00:34:58
Postcode	233 TelepathTranslator	Telepath	Alan Brown	3112198012	R,02.0083024.M	New		28/05/2009
CHI	232 TelepathTranslator	Telepath	Alan Brown	3112198012	R.02.0083024.M	New		28/05/2009
PAS	230 TelepathTranslator	Telenath	Alan Brown	3112108012	P.02.0083024 M	New		28/05/2009
Other Patient Id	200 relepadirialistator	reiepdui	Sarah	5112190012	NJ02.0003024.M	14.510		00:30:48
	197 Telepath Franslator	relepath	Paterson	3056472444	K,02.008/145.Y	OK	Processing Completed Successfull	22:52:49
	196 TelepathTranslator	Telepath	Preece	3639462333	R,02.0087145.Y	ок	Processing Completed Successfull	22:52:49
	195 TelepathTranslator	Telepath	Alison Black	7830135222	R,02.0083024.M	ок	Processing Completed Successfull	y 27/05/2009 22:52:48
	12345							

3.2 Searching

As with the Uploaded Files screen, to conduct a search, enter some of the following selection criteria and click **Search**:

- Source system select which interface to search against
- Status status of the message (Actioned, All Errors, CHI Match Error, New, OK, Mapping Error, Match Error, Parse Error, Patient Error, Report Error or System Error See Appendix A for definitions)
- Description search contents of the message description field
- Transaction Date From date to search from
- Transaction Date To date to search to
- Match Rule which matching rules were used in patient matching
- Match Action which action occurred then the record came into Store (Insert, Update, Add alias etc.)
- Discipline Biochemistry, Haematology etc.
- Requestor
- Requesting Organisation

- Report Id
- Patient ID SCI Store ID number
- Surname
- Forename
- Date of Birth
- Postcode
- CHI
- PAS
- Other Patient ID

As in the **Uploaded Files** screen (section 2.2) running searches with no criteria or based only on "Description" is not recommended. This type of search is likely to have adverse effects on the overall performance of the SCI Store application.

3.3 Actions

Various actions can be carried out on these messages by selecting the relevant action from the **File Actions** drop down list and clicking on Go. The available actions are as follows:

- Flag as Actioned: This assumes some sort of user action has been carried out. For example, the user has viewed the record and concluded that there is nothing that can be done to the file, or a mapping has been added to the patient, or it has been matched manually and therefore should not be considered as an "Exception". This action can only be carried out on messages that do not have a status of "OK".
- Performing this action on messages with a status of "OK" will result in the following message being displayed, "nn files have been processed previously". The status of these messages will not change.
- **Flag as New:** These messages will be **flagged** as **New** and processed by the TranslatorFromDatabase service again.
- **Parse Messages:** Will attempt to process all messages returned by the search into Store.

3.4 Parsed Message Screen

Clicking on one of the messages returned will display the screen over the page.

From here all the details for the messages that have been sent into Store can be viewed. It is also possible to carry out the following actions:

- **View Patient**: View the patient record, only available if the Store Patient ID exists.
- **Go To Split Record:** Returns the user to the split record
- **Parse Message:** Parses the message, only available if the message status is "New" or "Error".
- **Flag as Actioned:** Flag the message as "Actioned", only available if the message status is not "OK".

- **Flag as New:** Flags the message as "New", for either automatic processing or for manual processing.
- **Merge Patient:** Navigates to the Manage Duplicates screen so that patient records can be merged; only available if an "Error" has occurred.
- **Manual Match:** Navigates to the Manual Match screen so that patient records can be matched (only available if the status flag is "Match Error" or "Patient Error"). Explained in more detail in section 6.

Parsed Message - Microsoft I	nternet Explorer					
File Edit View Favorites Tools	s Help					A.
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Address 🙆 http://localhost/StoreWeb	/Restricted/Services/ParsedFromDb.aspx?Ck	assIdx=233			× -	Go Links X
Google	🗸 🔧 Search 🔹 🖓	• 🌀 📲 🛛 🔯 • 😭 Bookmarks	• 🍄 Check • 🣔 AutoFill • 🌛		2	🔹 🔵 Sign In 🔹
SCI Store Paisley					My Settings About Store	Log Out 🔥
Home Find Patient Find Re	esult Find Document Find on C	н			Patient ID:	Go
	Configuration	Exceptions Mgmt Security	Maintenance Reporting	General Notifications		
Home > Parsed Files > Parsed Me	issage				User: admin	on PJSSCI6
(=) III II III III					Actions Select Action	V Go
- Parsed Message Details-						
Source System	Telepath		Status	New		
Status Date	28/05/2009 00:	33:56	Status Description			
Match Action	Update		Match Rule	Greater Gla	asgow Match	
Detiret Details						•
CHI	3112198012	PAS	8150198284	Other Id	8932469419	×
Name	Alan Brown	Date of Birth	31/12/1980	Sex	Male	
Address	124 Paisley Road West Glasgow	Postcode	G6 9DT	Store Patient Id	3	
Desistanal CD						•
GP	HOIDA, ELLEN	GP Practice	UNST HEALTH CENTRE	Practice Code	39001	×
	frozen, cash	di frideaco	onor nenerit outrine	There ever		
Result Details						*
Discipline	Haematology	waru Report Date	11/06/2002 12:20:00	Report Id	P 02 0082024 M	
Discipline	naematology	Report Date	11/06/2002 12:30:00	Keport Iu	K,02.0003024.M	
1						
1						~

If more than one record has been returned by the original search, the user can navigate through the list of Parsed messages using the standard navigation toolbar in the top left of the screen.

4 ACSC Registration Search

4.1 Overview

The ACSC Registration Search screen allows the user to check if a particular patient (s) in SCI Store has been registered on the CHI Mainframe to be included in the Daily Broadcast Files.

4.2 Accessing the ACSC search page

The ACSC Registration search can be accessed from the following menu option

Exceptions Management

 \Rightarrow

_											
Ş	SC	I Store Pa	isley					My Se	ttings A	bout Store	Log Out
ł	lome	Find Patient	Find Resu	lt Find Do	cume	ent Find or	CHI		Patient I	D:	Go
	C	onfiguration	Except	ions Mgmt	Se	curity Ma	intenance	Reporting	General	Notificati	ons
H	ome		Uploa	ded Files					U	ser: admin (on PJSSCI6
	Recently	Viewed Recent	Parse	d Files		ministration					
			Store	Parse Log							
	Patient	ts Results I	Docu	ments Uploaded							
	5 Reco	ords Returned	Марр	ing Audit Report							
	Sour	ce Nan	ACSC	Registrations		СНТ					
	Local	ChiTest surr	name54		М	051167141	3				
	Local	ChiTest surr	name54	25/06/1951	М	051167141	1				
	Local	ChiTest53 s	urname53	25/06/1951	М	051167131	2				
	Local	ChiTest53 s	urname53	25/06/1951	M	051167131	1				
	Local	ChiTest51 s	urname51	25/06/1951	М	051167121	1				

ACSC Registrations

4.3 Search form functions

This search form allows users to check if a particular Patient(s) in the SCI Store has been marked on the CHI Mainframe to be included in Daily Broadcast Files.

St SC	I Store Pa	isley					My Settings	About Store	Log Out
Home	Find Patient	Find Result	Find Documer	nt Find on	СНІ		Pat	ient ID:	Go
	Configura	tion Exce	ptions Mgmt	Security	Maintenance	Reporting	General	Notifications	
Home >	ACSC Registrati	ons						User: admin on '	Test Server
Status			*						
Descrip	tion								
Transac (dd/MM,	tion Date/Time I /yyyy hh:mm:ss	From							
Transac (dd/MM,	tion Date/Time ' /yyyy hh:mm:ss	To							
Patient	ID								
Surnam	ie								
Forenar	ne								
Date Of (dd/mm	Birth Vyyyy)								
Post Co	de								
СНІ									
Other P	atient ID (CRN)								
s	earch F	lag As New F	Tag As Actioned						
Regis	ter Op CHI	lear Search	-						
- nagio									

4.4 Actions

The following table details the actions that can be performed from this Web Page:

Button	Description
Search	Conducts a search against the table "ACSCRegistration" based on the supplied search criteria.
Flag As New	Flags the records returned by the search as "New" in the "ACSCRegistration" table. If a message has been flagged as "New", it will be processed by the ACSC Registration service again.
Flag As Actioned	Flags the records returned by the search as as "Actioned" in the "ACSCRegistration" table. If a message has been flagged as "Actioned" it is assumed that some sort of user action has been carried out.
Register On CHI	Will register the Patient(s) returned by the search on the CHI Mainframe using the designated ACS Code.
Clear Search	Clears the search criteria and search results.

4.5 ACSC Registration Details Screen

Selecting a record from the search results displays the ACSC Registration Details Web Page as follows:

ACSC Registration Details	- Microsoft Internet Ex	cplorer								
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	<u>T</u> ools <u>H</u> elp									
🕒 Back 🝷 🐑 🖌 🚺	🔋 🏠 🔎 Search 🧧	🔀 Favorites	🔗 · 🌺 👿 ·	<mark>_</mark> 🗱 🔏						
Address 🕘 http://localhost/StoreWeb/Restricted/Services/ACSCRegistrationDetails.aspx?contactID=131&pID=291 🛛 🔽 🄂 Go 🛛 Links 🌺										
SCI Store Paisley on PJSS										
Home	Main	Interfaces	Administra	ition Log off						
Home / AmendstoreTou	HI / SystemSettingsA	amin / Alsikeg	Status Description	SUREgistrationDetails						
Otatus	000000074444.05			New						
Status Date	23/08/2007 14:11:05		Match Action							
Match Rule			Autor Accor							
Store Patient ID	291	View Patient	Surname	TEST						
Forename	Pauline		Middle Name							
Date Of Birth	12/12/1922 00:00:00		CHI	1212221230						
PAS			Other ID							
Address	15 Main Street Glasgow		Postcode	G 401QA						
GP			GP Practice	(NOT KNOWN) NOT STATED						
Consultant	STATED, NOT		Ward/Location							
Diagnostic Service			Report ID							
Report Date			Hospital							
Previous Next	FlagAsNew FlagAsActi	oper		1						
	RegisterOpCHI									
Ev#	Registerentin									
					62	~				
😂 Done					🤡 Local intranet					

The Web Page provides additional information with regard to the Patient record that was selected from the ACSC Registration Search screen.

4.6 Actions

The following table details the various actions that can be performed from this screen:

Button	Description
Previous	Displays the previous record in the search results result-set.
Next	Displays the next record in the search results result-set.
Flag As New	Flags the patient record in the table "ACSCRegistration" as "New". If a message has been flagged as "New", it will be processed by the ACSC Registration service again (If enabled).
Flag As Actioned	Flags the patient record in the table "ACSCRegistration" as "Actioned". If a message has been flagged as "Actioned" it is assumed that some sort of user action has been carried out (If enabled).
Register On CHI	Registers the selected Patient on the CHI Mainframe (If enabled).
Exit	Returns the user to the ACSC Registration search screen.

5 Documents Uploaded (DocToDB)

5.1 Overview

The Documents Uploaded search screen allows the user to check the status of any documents that are uploaded and manage any exceptions that occur.



5.2 Searching

To conduct a search, enter one or more of the following search criteria and click the "search" button.

- Document Source (Name of the Document to Database interface)
- XML Filename
- Processing Stage (detailed in Appendix B)
- Processed
- Status
- Description (Content of the message associated with the status of the uploaded document e.g. Completed successfully)
- Date/Time From (Date/Time Processed From)
- Date/Time To (Date/Time Processed To)
- Patient Details Criteria (All values taken from XML Metadata file):

\Rightarrow	CHI
\Rightarrow	Other ID
\Rightarrow	Other ID Type
\Rightarrow	Surname
\Rightarrow	Forename
\Rightarrow	Date of Birth

ode
,

• Document Details Criteria (All values taken from XML Metadata file):

\Rightarrow	Document Identifier
\Rightarrow	Document Category
\Rightarrow	Document Title
\Rightarrow	Additional Text
\Rightarrow	Document Specialty
\Rightarrow	Document Organisation
\Rightarrow	Organisation Type
\Rightarrow	Originating HCP
\Rightarrow	Attesting HCP
\Rightarrow	Receiving HCP
\Rightarrow	Copied HCP

Note. If no search criteria are entered, all the results in the database will be returned (depending on whether the "SearchLimit" system setting has been set).

C Documents Uploaded - Windows Internet	Explorer								
🚱 🕤 👻 🙋 http://localhost/StoreWeb/Restricte	ed/Services/DocToDBSearch	aspx			Google				
Eile Edit View Favorites Iools Help	Ele Edit View Favorites Iools Help								
😭 🏟 🎉 💋 Documents Uploaded									
SCI Store Paisley					My Settings About Store Log Out 🤷				
Home Find Patient Find Result Find I	Document Find on C	HI			Patient ID: Go				
Co	nfiguration Exce	otions Mgmt	Security	Maintenand	ce Reporting General Notifications				
Home > Documents Uploaded	1				User: admin on PJSSCI6				
Search Options Search Clear	62 Records Returned	Records Pe	er Page 20	✓ View All	File Actions Select Action Y Go				
Document V	1 <u>234</u>								
XML Filename	Service XML File Date	Processing Stage Reached	Processed	Status	Description				
Processing Stage Processed	Local 2009-06- Docs 08 v2.3 16:09:19	4 - Patient Match	ок	Patient Match Complete	2009-06-08 16:18:44 DocumentToDatabase ManualMatch - Add Alias Successful				
Status Description	Local 2009-06- Docs 08 v2.3 15:28:34	5 - Link Document to Patient	ок	ок	Completed successfully 08/06/2009 15.28.38				
Date/Time	Local 2009-06- Docs 08 v2.3 15:27:03	5 - Link Document to Patient	ок	ок	Completed successfully 08/06/2009 15.27.25				
Patient Details ¥ Document Details ¥	Local 2009-06- Docs 08 v2.3 15:25:52	2 - XML Parse	ок	XML Parse Error	08/06/2009 15.26.13XML Parsing Errors Error Position after: DocumentUpload The element 'DocumentUpload' in namespace http://www.show.socu.nhs.uk/isd/DocumentUpload' has invalid child element 'NessageData' in namespace 'http://www.show.socu.nhs.uk/isd/DocumentUpload'. List of possible element expected'. http://www.show.socu.nhs.uk/isd/DCIStore:NessageData'.				
	Local 2009-06- Docs 05 v2.3 02:23:25	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 02.23.53				
	Local 2009-06- Docs 05 v2.3 01:37:55	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 01.40.24				
	Local 2009-06- Docs 05 v2.3 01:37:54	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 01.40.23				
	Local 2009-06- Docs 05 v2.3 01:37:54	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 01.40.23				
	Local 2009-06- Docs 05 v2.3 01:37:54	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 01.40.23				
	Local 2009-06- Docs 05 v2.3 01:37:54	5 - Link Document to Patient	ок	ок	Completed successfully 05/06/2009 01.40.22				
	Local 2009-06- Docs 05	5 - Link Document to	ок	ок	Completed successfully 05/06/2009 01.40.22				
DocToDBSearch.aspx					Local intranet 🔍 100% 👻				

The search results will then be returned as follows:

Clicking on the **Clear** button will clear the search results and criteria and restore the search defaults.

5.3 Actions

As per the Uploaded Files and Parsed Files Search screens, the messages that the search returns can then be flagged as "Actioned" by selecting "Flag As Actioned" option from the Actions drop down and clicking "OK"

By flagging as "Actioned" it is assumed that some sort of user action has been carried out, for example, the user has viewed the record and concluded that there is nothing that can be done to the file.

5.4 Document Upload Details Screen

Clicking on one of the messages returned will then display the following screen:

🖉 Documents Upload De	tails - Windows Internet Explorer						
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<u>File Edit View Favorite</u>	s <u>T</u> ools <u>H</u> elp						
🔶 Favorites 🛛 🌈 Docume	nts Upload Details			b	• 🔊 - 🖃	🖶 🔹 Page 🔹 Safety	• T <u>o</u> ols • 🔞 • »
SCI Store Pa	isley				My	Settings About St	ore Log Out
Home Find Patient	Find Result Find Document Fi	nd Treatment Log				Patient ID:	Go
	Configuration Exception	ns Mgmt Securit	y Maintenance	e Reporting Ger	neral Notifi	cations	
Home > Documents Uploa	ded > Documents Upload Details					User: ad	lmin on PJSSCI6
)					Actions	Select Action 💌
(Degument Upland De	taile						
Document Source	Local Docs v2 3	XMI F	ile Path	d:\Reg_Interface\Doc	toDB23\LocalDo	ncs\XMI	
Stage Reached	5 - Link Document to Patient	XML F	ile Name	xml WillBeSecondarvi	MergeDoc.xml	0000000	
Processed	1 - Processing Complete	XML F	ile Date	16/11/2010 19:42:51	-		
Status	1 - Processing successful	Statu	s Date	16/11/2010 19:46:56			
Status Description	Completed successfully 16/11/201	0 19.46.56					
L							
Document Parsing Detail	s						*
Parse Date & Time	16/11/2010 19:46:56		Docu	nent Status	New		
Document Title	Compas Merge Willbe Seconda	ry	Docu	nent Specialty	Haematology		
Document Revision	001		Docu	nent Organisation	Glasgow West	tern Infirmary	
Document Category	Correspondence		Style	Sheet	N/A		
Document Sub-Catego	ry Clinical letter		Sorti	ng Date & Time	20/03/2006 1	5:55:00	
Action Date	N/A		Creat	ed Date	N/A		
Additional Text	N/A						
Detient Develop Details							
Patient Parsing Details	WillBe Secondary	СНІ	N/A	Patient A	ddress	46 Fast Perm Road	~
Patient Sex	M	Other ID	RCH280414			Edinburgh	
Date of Birth	23/01/1967	Other ID Type	CRN	Post Code	•	N/A	
Matching Details							*
Document Upload Details							*
XML File							×
					Second Second Second Second	tranet 🛛 🖓	- 🔍 100% - 🛒

This screen displays details relating to the progress of the Document Upload process for the selected record. This includes details of the document upload stage & status, document and patient information parsed from the XML metadata file, as well as mapping and matching information. It is also possible to view the XML metadata file that has been uploaded.

The Document Upload process occurs in 5 separate stages:

- 1. XML Upload
- 2. XML Parse
- 3. Document Upload
- 4. Patient Match
- 5. Link Document to Patient

Exceptions can occur at any of these stages. Details of the types of exceptions can be found in Appendix B. This screen allows the user to manage any exceptions that occurred to the selected record. The following actions can be performed from this page

- **Flag as Actioned:** Flag the message as "Actioned", only available if the record has not been successfully processed.
- **Manual Match:** Navigates to the Manual Match screen so that records can be matched to a patient

\Rightarrow	Only available if the status flag is "PatientMatch Error",
	"CHI Match Error" or "Duplicate Patient".
\Rightarrow	Explained in more detail in section 6

• **Reprocess Document From Current Stage:** The system will attempt to reprocess the record from its current state. This action should be undertaken after the user has fixed the original cause of the exception e.g. after

\Rightarrow	fixing any mapping issues
\Rightarrow	manually matching the record to a patient.
\Rightarrow	copying a missing document into the correct directory

If the record is processed successfully the user will also be able to:

- View Patient: View the patient record
- **View Document**: View the uploaded document, unless the document has been deleted

If more than one record has been returned by the original search, the user can navigate through the list of Document Upload records using the standard navigation toolbar in the top left of the screen.

5.5 Manual Document Upload

Documents uploaded through a Manual Document Upload interface are not handled any differently in exceptions management although there are some notable distinctions:

- A manually uploaded document has no associated XML metadata filename, therefore any reference to XML on the Document Upload Details page will not be displayed be or will display as '*N/A*'.
- The processing stage will only ever be '5 Link Document to Patient'. When a user uploads a document manually an errors will result in the upload being rejected completely.
- The 'Processed' stage will only be '1 Processing Complete'
- The 'Status' value will only be '1 Processing Successful'.

6 Manual Matching

6.1 Overview

SCI Store provides facilities for input of various types of data. As part of this data, patient demographic information is supplied and compared with existing patient demographic information in SCI Store, using a set of rules which may be configured for each Interface separately at a site.

Application of these rules may result in exceptions being reported. Typically these may arise because:

- One or more mandatory items in the patient demographic dataset is missing
- The given patient demographic information does not match with any existing patient (and the matching rules specify that a New patient is not created in these circumstances)
- There is more than one possible match when the rules are applied

In these circumstances manual intervention is required to assess the data provided and determine what action should be taken.

The Manual Match facility provides options to create a new Demographics record in SCI Store, to Update, to Attach or add an Alias to an existing record, by selecting one of a set of potential matching records (according to the matching rules) as being the one to be matched with on this occasion.

Also, with the right permissions, the Manual Match facility also allows the user to search for the patient on the CHI system and import a patients demographics before applying the matching rule selected above to the imported patient.

6.2 Displaying the List of Matches

Manual Matching can be invoked from two separate pages:

- for Patient Demographic or Lab Results interfaces it is invoked from the menu via Exceptions Management/Parsed Message (see section 3)
- for Document Upload it is invoked from the menu via Exceptions Management/Documents Uploaded (see section 5)

As noted previously, the Manual Match facility can be invoked when a variety of circumstances cause a Patient Match exception. These include both no patient matched and more than one match (with the current set of patient matching rules.)

On entry to the Manual Match screen, the match process is invoked using all the demographics data fields available. If this default search does not retrieve the required results, the user can alter the criteria being searched on to return a list of potentially matching patients. This can be done by selecting/deselecting the desired criteria, or changing the values within the criteria text boxes.

6.3 Result Interfaces

The following page is displayed when the "Manual Match" action is selected from the Exceptions Management\Parsed Message page. When the page first loads all

criteria fields are selected and a search is performed based on patient information existing within the underlying "Parsed Message". Patient and report details and manual match search criteria are also populated based on this information.

C Manual Match - Windows Internet Explorer	
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🙀 Favorites 🛛 🍘 Marual Match	• Page • Safety • Tools • 🔞 • *
Stare Paisley My Setting	gs About Store Log Out 🖂
Home Find Patient Find Pacult Find Document Find Treatment Log Pat	tient ID: Go
Configuration Exceptions High Security Maintenance Reporting General Notifications	
Home > Parsed Files > Parsed Message > Manual Match	User: admin on PJSSCI6
(a) +	
Patient Details	
Forename David Middle Name Surname Edwards Date Uf Birn CHI 0504557713 PAS Other Id CC/989315545	05/04/1956
Address Dated Diverset Western Postcode G3 2DF	
Koaujaissyuw Banart Dataila	
GP HOIDA, ELLEN GP Practice UNST HEALTH CENTRE Consultant (surname) Ward / Location	
Diagnostic Service Haematology Report Id H03,08058012.G Report Date 13/02/2007 14:45:00 Hospital	
Search Options Populate Search Clear 1 Record Returned	Ξ.
Full Name Source Surname Forename Date of Birth CHI Address Search Local Strate Educated David District, 55 050052713, 12 Gest Western Pasal Glasnow G3.2	DE XNI 40Translator
Surname 🔽 Edwards	
Forename 🔽 David	
Middle 🔽	
Date of 🔽 05/04/1958 👻	
CHI 🔽 0504567713	
Other Id 🔽 CC/989315545	
Address 🔽 12 Great Western Acad (Glasgow	
Postcode 🔽 G3 2DF	
Available Deta Sources	
Local 19	• • • • • • • • • • • • • • • • • • •

6.4 Document Interfaces

The page below is displayed when the "Manual Match" button is clicked on from within the Exceptions Management/Documents Upload Details page. This screen differs slightly in content from that used for the Results interface; however the search functionality is similar between both functions.

🖉 Documents U	Jpload i	Manual Match -	Windows Inter	rnet Explore	5								
G .	http://	ocalhost/StoreWeb,	/Restricted/Service	es/DocToDBMan	ualMatch.aspx?Do	ocSourceID=2	87		v [🗟 🐓 🗙 🛃 Google			P -
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SCI Sto	ore P	aislev								My Setti	ngs Abo	ut Store	Log Out 🔺
Home Find F	Patient	Find Result	Find Documer	nt Find Tre	atment Log					P	atient ID:		Go
			Configur	ation Ex	ceptions Mgr	nt Secu	rity Maintenan	ce Reporting	General	Notifications			
Home > Docume	ents Upl	oaded > Docum	ents Upload Det	ails > Docum	ents Upload M	anual Match					User	admin o	n PJSSCI6
⇔ +													
Patient Deta	ils e	Baulk Other	rload		снт		9876543210	Patie	nt Address	1234			
Patient Sex		F	2000		Other ID		ABC123456			Great North Sour Roa Biotown	ad		
Date of Birth		15/09/1955			Other ID Ty	pe	CRN	Post	ode	EH22 4AT			
Document De	etails -												
Parse Date &	k Time	27/02/2012	15:24:49		Document S	tatus	New	Docum	ent Title	BulkLoad New	Document		
Document Re	evision	001			Document S	pecialty	Cardiology	Patient	Consent	Y			
Document Ca	ategory	Correspond	lence		Document S Category	ub-	Transfer letter	Sensiti	vity	s			
Search Options		Populate Search	Clear	1 Record Re	turned								
Full Name 🗖				Source	Surname	Forenam	e Date of Birth	CHI		Address		Source S	iystem
Search Sumame	Log	4	-	Local Store	Load	Baulk	15/09/1955	9876543210	1234 Great No	rth Sour Road Bigtown EH2	2 4AT	Local_Doc	roDBv23
Forename	Baul	k	-										
Middle 🔽	Othe	ər											
Date of F Birth	15/0	09/1955	~										
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Other Id 🛛 🔽	ABC	123456											
Address 🔽	123 Sou	34 Great Nor ur Road Bigt	th 🔨										
Postcode 🔽	EH2	2 4AT											
Available Data	Sources	5											~
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6.5 Search Considerations

The search criteria will be populated initially by the details supplied through the interface. All criteria will be selected when initially accessing the page.

The user has the option to change the selection and values held in these search fields and re-run the search by clicking on the **Search** button. If the user wishes to remove all search criteria that has been entered they can click on the **Clear** button and then re-enter new criteria from scratch. The clear button will not have an effect on the what criteria is selected via the criteria selection checkboxes.

Alternatively a user may refill the search fields with their original search criteria by clicking on the **Populate** button. This will re-populate these fields but will not change the selection checkbox against the field

Checking the Full Name Search checkbox will affect the results returned whenever any name based search criteria is included.

The scenario outlined below explains the significance of the Full Name checkbox:

		Forename	Middle Name	Surname	
Patient	1	Sarah	Jane	Watson	
Patient	2	Sarah-Jane		Watson	

Example 1: Full Name checkbox unchecked and search criteria of middle name = "Jane".

This will return results for patients with a middle name of "Jane" (i.e. Patient 1 only)

Example 2: Full Name checkbox checked and search criteria of middle name = "Jane".

This will return results for patients who contain "Jane" within any part of their name (i.e. Patient 1 & 2).

When a search is run and matches exist, results are displayed in a grid on the page. From the results returned, the user must identify the correct record to match, by **clicking** the appropriate row in the grid.

This in turn will show the **Patient Details popup**, which contains basic patient information along with the patients' addresses and Ids. It also contains the **Patient Action** dropdown list, allowing the user to **select** a **Match Action**. Sections 2.4.6, 2.4.7, 2.4.8 and 2.4.9 explain these actions in further detail.

6 Manual I	Match	- Windows Internet	Explorer										
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🔶 Favorites	C	Manual Match								🙆 • 🔊	- 🖶 -	Page - Safety -	T <u>o</u> ols • 🕢 • **
SCI :	Stor	e Paisley									My Settings	About Store	Log Out 🔼
												ient ID:	Go
Home > Par		es > Parsed Message	Configurat > Manual Match	ion Exce	ptions Mg	mt S	ecurity Maintenan	ce Reporting	General	Notifications		User: admir	on PJSSCI6
014													
			Patient Details								×		
Patient Forenam CHI Address	Detail e	S David 050456771 12 Great V Road Glas	Patient Patient Name	CHI	Date Of I	Birth Ag	e GP	Patier GP Practice	nt Action Selec Selec Consult	t Action Action Add Alias Attach	Go h	05/04/1956	
Report [Name Changed	0504567715	05/04/1	900 D:	HOIDA, ELLEN UNS	THEALTH CENTRE	Match	Update			
GP Diagnost	ic Ser	vice Haematolo	Addresses IDs								ition		
Search Opt		Populate Sear	2 Records Retur	ned									3
Full Name Search			ID Value	ID Scheme	ID Type	Status	Last Encountered					Sourc	e System
Surname	V	Edwards	0504567713	СНІ	Personal	Active	24/02/2012 17:59:48				/ G3 2DF	 XML40 	liranslator
Forename		David	CC/989315545	NHS	Personal	Active	24/02/2012 17:59:48						
Name]			_		
Date of Birth	$[\checkmark]$	05/04/1956											
CHI	$[\checkmark]$	0504567713											
Other Id	$\overline{\checkmark}$	CC/989315545											
Address	V	12 Great West Road Glasgow	ern 🔨										
Postcode	V	G3 2DF											
Aupilable													
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Done										S 20	Local intranet	- G -	🔍 100% 🔹 🤃

Once a "Patient Action" has been performed the user will be redirected to the relevant "Parsed Message" or "Document Upload Details" screen, where the message "Manual match completed successfully" should appear.

6.6 Insert a New Record into SCI Store

If after examining the possible matches for a patient it is determined that no existing patient matches the new patient details, the User may elect to "Insert" a new Demographics record. In this case, select the **button** from the toolbar.

Before the action is finalised a confirmation popup will be displayed.

C Manual Match - Windows Internet Explorer	
COC + Ittp://localhost/StoreWeb/Restricted/Services/MatchManual.aspx?MessageParseID=674	💌 🗟 🐓 🗙 🛃 Google
👷 Favorites 🏼 🍘 Manual Match	🚹 🔻 🔝 🗉 🖶 👻 Bage 👻 Safety 👻 Tools v 🔞 v 🎇
SCI Store Paisley	My Settings About Store Log Out 🔥
Home Find Patient Find Result Find Document Find Treatment Log	Patient ID: Go
Configuration Exceptions Mgmt Security M	aintenance Reporting General Notifications
nome > Parseu mes > Parseu message > Manuar Macun	User, autilit on F33500
Patient Details Middle Name Forename David Middle Name CHI 0504567713 PAS Address 12 Great Western Postcode G3 3DF	Surname Edwards Date Of Birth 05/04/1956 Other Id CC/989315545 CC CC <td< td=""></td<>
Report Details Report Details GP HOIDA, ELLEN GP Practic Diagnostic Service Haematology Report Id You are about insert the patient from	Ward / Location 14:45:00 Hospital
Search Options Populate Search Clear 1 Recor Do you wish t	o continue?
Full Name Sour	Address Source System
Surname 🔽 Edwards	eat Western Road Glasgow G3 2DF XML40Translator
Forename 🔽 David	
Name 🔽	
Date of Birth 05/04/1956	
CHI 🔽 0504567713	
Other Id 🔽 CC/989315545	
Address 🔽 12 Great Western 🗠 Road Glasgow	
Postcode 🔽 G3 2DF	
Available Data Sources	
Done	😪 Local intranet 🦓 💌 🍕 100% 🔻 🤮

Once completed successfully the following message will be displayed "Manual match completed successfully".

6.7 Updating an Existing Record in SCI Store

From the list of patients displayed, click the **row** corresponding to the patient required. The **Patient Details Popup** will be displayed, including the **Patient Action** dropdown list. Select the **Match: Update** option and click on the **Go** button.

Once completed successfully the following message will be displayed "Manual match completed successfully".

🤗 Manual Match - Windows Internet Explorer		- 7
🚱 🕞 💌 🖻 http://docahost/StoreWeb/Restricted/Services/MatchManual.aspx7MessageParsetD=674 🔍 😰	🗙 🛃 Google	P •
👷 Favorites 🦉 Manual Match) • ⊜ • ⊡ ⊕ • B	age • Safety • Tools • 🔞 • *
		About Store Log Out 🛆
		ID: Go
Configuration Exceptions Mgmt Security Maintenance Reporting General Notifications		Harry admin on Discosts
nome > ransed riles > Parsed Message > Manual Match		User: admin on PJSSCI6
Patient Details	0	
Forename David David	f Birth 05	/04/1956
CHI 0504567713 Patient Action Select Action C Go		
Address 22 Great Vescent Patient Select Action Select Action Match Add Alas		
Report Details David Edwards 0504557713 05/04/1956 55 H01DA, ELLEN UNST HEALTH CENTRE Matter Update		
GP HOIDA, ELLEN Name Changed	Location	
Search Options Populate Search Clear		_
Pull Name 2 Records Returned	s	Source System
Search ID Value ID Scheme ID Type Status Last Encountered	v G3 2DF	XML40Translator
Sumame v civalus Foreanne v avid 0504567713 CHI Personal Active 27/02/2012 15:45:40		
Nide Contraction of the second s		
Name CC/989315545 NHS Personal Active 27/02/201215:45:40		
Birth Postaviase		
CHI 🔽 054567713		
Other Id M COMBBITS45		
Address 🔽 12 Great Western Road/Glasgow		
Postcode 🔽 G3 2DF		
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6.8 Adding an Alias for an Existing Record in SCI Store

In some circumstances we want to update the clinical information for the patient (i.e. results, documents etc) but apart from inserting any new patient identifiers, we do not want to update the demographic information. We can use the Add Alias action to achieve this.

In this case, select **Match: Add Alias** from the dropdown list and click on the **Go** button.

Once completed successfully the following message will be displayed:

• "Manual match completed successfully".

6.9 Attaching a Name to an Existing Record in SCI Store

In some circumstances we want to update the clinical information for the patient (i.e. results, documents etc) and in addition we want to attach the patient name to the record so that any future files passed into Store containing this name will match with the correct patient. We can use the Attach action to achieve this.

In this case, select Match: Attach from the dropdown list and click on the Go button.

Once completed successfully the following message will be displayed:

• "Manual match completed successfully".

6.10 Searching on CHI

The Manual Matching facility now has the ability to allow the user to search for patients on the CHI system and import them into Store, before matching the current record to them. This functionality exists on both manual match pages

Only users who allowed access to CHI via the **Remote Data Sources** functionality will be able to search on CHI.

A user will be able to select whether to search on CHI or search the local database using the Remote Data Sources selection at the bottom of the page search criteria.

6.11 CHI Search Criteria

If a user selects to search on CHI then the search criteria will be automatically restricted to **Surname, Forename, Date of Birth** and **CHI**. All other search criteria will be deselected and disabled. To enable a search to be performed either the **CHI** number or the **Date of Birth** must be populated.

Search On	tions	Populate Search	Clear
Search op	ciona	Populate Search	cical
Full Name Search			
Surname	\checkmark	Edwards	
Forename	\checkmark	David	
Middle Name			
Date of Birth	☑	05/04/1956	*
CHI	$\overline{\mathbf{v}}$	0504567713	
Other Id		CC/989315545	
Address	Γ	12 Great Western Road Glasgow	~
Postcode		G3 2DF	
			1
Available D	Data So	ources	
Local		С	
CHI		(•	

6.12 CHI Search Results & Matching

As with a local search, matches found on CHI are displayed in a grid to the right of the search criteria. When the desired match is clicked the **Patient Details Popup** will be displayed, this time populated with details from the CHI system.

Again the **Match Action** drop down will be shown however with slightly different options to a local search. The user will instead be presented with the following options:

• Test Match

- Performs a test match to current patients in Store. The matching rules used are those defined in the CHI Lookup interface type. The result of the test match will be displayed in the popup.
- Save & Match: Update
 - Saves the CHI patient into Store and performs a Match: Update action as described in section 6.7 above
- Save & Match: Add Alias
 - Saves the CHI patient into Store and performs a Match: Add alias action as described in section 6.8 above
- Save & Match: Attach
 - Saves the CHI patient into Store and performs a Match: Attach action as described in section 6.9 above

Appendix A: Search status definitions for Uploaded Files and Parsed Files

Uploaded Files Search

Status	Definition
Actioned	File actioned by the user.
All Errors	All error message types.
New	Files with a status of New, i.e. waiting to be split\parsed.
ОК	Processing successful.
Parse Error	File could not be split or parsed. Possibly due to corrupt data.
System Error	Unexpected error with SCI Store e.g. Missing stored procedure, session timeout, database unavailable.

Parsed Files Search

Status	Definition
Actioned	File actioned by the user.
All Errors	All error message types.
CHI Match Error	Exception match rule has not been satisfied
New	Files with a status of New, i.e. waiting to by parsed.
ОК	Processing successful.
Mapping Error	A required mapping code is missing e.g. missing GP code.
Match Error	Exception match rule has been satisfied e.g. Mandatory data missing
Parse Error	File could not be split or parsed. Possibly due to corrupt data.
Patient Error	More than one patient to match against has been found.
Report Error	More than one matching report has been found.
System Error	Unexpected error with SCI Store e.g. Missing stored procedure, session timeout, database unavailable.

Appendix B: Document Upload exception status definitions

Documents Uploaded

Status	Definition
Actioned by User	File actioned by the user.
All Errors	All error message types.
CHI Match Error	Exception match rule has been satisfied
ОК	Processing successful.
Unexpected Error	An unexpected error occurred during the document upload process
Parse Error	The XML metadata could not be parsed. Possibly due to corrupt data.
Document Error	An error occurred while uploading the document. Possible causes include the document not existing in the document upload folder
Duplicate Patient	More than 1 patient match has been found
Mapping Error	A required mapping code is missing e.g. missing GP code.
Patient Match Exception	Exception match rule has been satisfied e.g. Mandatory data missing
Patient Match Complete	A record is given this status after the user has Manually Matched the record. The user must then Reprocess the record.

Document Control

Document Information

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Issue:	2.0
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Filename:	SCI Store - Exceptions Management Guide.doc
Format:	Microsoft Office Word 2003
Owner:	Campbell Roberts
Status	Final
Distribution:	http://www.sci.scot.nhs.uk/products/store/

Change Log

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