Electronic Document Management (EDM)

Quick User Guide

Version N1.0

For a more detailed user guide, click the link below:

CONTENTS

1. INFORMATION GOVERNANCE .......................................................................................... 3
   1.1. What can you do to make IG a success? ................................................................. 3
2. INTRODUCTION ............................................................................................................. 5
3. LOGGING IN TO EDM .................................................................................................. 6
   3.1. Confirmation and the submit button ..................................................................... 7
4. THE MAIN SCREEN ..................................................................................................... 8
   4.1. Navigation ............................................................................................................ 9
   4.2. Changing Password ............................................................................................10
5. HELP .........................................................................................................................11
6. SEARCHING FOR A PATIENT ....................................................................................12
   6.1. The results ........................................................................................................13
7. VIEWING PATIENT DEMOGRAPHICS ......................................................................14
8. VIEWING THE MEDICAL RECORD .........................................................................15
   9.1. Episodes Screen ...............................................................................................15
   9.2. Opening an Episode .........................................................................................16
   9.3. Viewing a Document .......................................................................................17
9. B-FORMS ..................................................................................................................18
10. SEPARATOR SHEETS ...............................................................................................21
11. CENSUS (CONSULTANT ONLY) ...............................................................................23
   12.1. Census Data ....................................................................................................23
   12.2. My Schedule ..................................................................................................24
12. FAULT REPORTING ..................................................................................................25
   12.1. Out of office hours .......................................................................................25
13. HELP WITH USING EDM .........................................................................................26
VERSION CONTROL/LOG ...............................................................................................27
1. INFORMATION GOVERNANCE

Information Governance (IG) sits alongside the other governance initiatives of clinical, research and corporate governance. Information Governance is to do with the way the NHS handles information about patients/clients and employees, in particular, personal and sensitive information. It provides a framework to bring together all of the requirements, standards and best practice that apply to the handling of personal information.

Information Governance includes the following standards and requirements:

- Information Quality Assurance
- The NHS Confidentiality Code of Practice
- Information Security
- The Data Protection Act 1998
- Records Management
- The Freedom of Information Act 2000
- Caldicott Report December 1997

1.1. What can you do to make IG a success?

1.1.1. Keep personal information secure

Ensure confidential information is not unlawfully or inappropriately accessed. Comply with the Trust ICT security policy and Staff Code of Confidentiality. Do not share your password with others. Ensure you "log out" once you have finished using the computer. Do not leave manual records unattended. Lock rooms and cupboards where personal information is stored.

1.1.2. Keep personal information confidential

Only disclose personal information to those who legitimately need to know to carry out their role. Do not discuss personal information about your patients/clients/staff in corridors, lifts or the canteen.

1.1.3. Ensure that the information you use is obtained fairly

Inform patients/clients of the reason their information is being collected. Organisational compliance with the Data Protection Act depends on employees acting in accordance with the law. The Act states information is obtained lawfully and fairly if individuals are informed of the reason their information is required, what will generally be done with that information and who the information is likely to be shared with.

1.1.4. Make sure the information you use is accurate

Check personal information with the patient. Information quality is an important part of IG. There is little point putting procedures in place to protect personal information if the information is inaccurate.

1.1.5. Only use information for the purpose for which it was given

Use the information in an ethical way. Personal information which was given for one purpose e.g. hospital treatment, should not be used for a totally separate purpose e.g. research, unless the patient consents to the new purpose.

Further information can be accessed on the Trust Intranet. Click on Information Governance and Management Policies under the Governance and Policies heading.
1.1.6. **Share personal information appropriately and lawfully**

Obtain patient consent before sharing their information with others e.g. referral to another agency such as, social services.

1.1.7. **Comply with the law**

The Trust has policies and procedures in place which comply with the law and do not breach patient/client rights. If you comply with these policies and procedures you are unlikely to break the law.

Written by PHT Information Governance Manager, Nov 05
2. INTRODUCTION

The **Electronic Document Management (EDM)** System enables a patient’s health record to be available through a computer system via a web browser.

The Trust is in the process of converting current paper document into electronic format using EDM.

This will allow authorised staff in clinical area’s to access a patient’s electronic record on a computer screen, navigate the record, manage and add content.

**EDM brings many benefits, including:**

- Better organisation and security of patient records
- Instant access to records
- Records available to multiple staff simultaneously
- Prevention of lost or missing records
- Ability to track and audit, access and changes to health records
- Access to records by authorised personnel only
3. LOGGING IN TO EDM

- Double click the EDM/ Health Records Icon on your desktop

- This will start an Internet Explorer session and a dialog box will appear prompting you to log in to EDM. (As shown below)

- Enter your user ID and password.

- **DO NOT** check the Remember my password tick-box as this will allow subsequent users to log in as you.

- If you have problems logging in or have forgotten your ID or password then contact the ICT Service Desk (details at the end of the manual)
3.1. Conformation and the submit button

By clicking on the submit button at the top of the screen (as shown below) it will confirm that you wish to log on as the given user and are authorised to do so.

Once the submit button has been clicked the system audit trail will begin to track all of the movements made within the system by this user.

By pressing the submit button, you will sign on to Wellness as DRDEMO

Information contained in these files are CONFIDENTIAL
You must only access records held on this system when you have a business need to know the information contained within the record. All other instances where records are accessed will be considered a breach of confidentiality rules and will result in disciplinary action. Portsmouth Hospital Trust

Click on the Submit button to continue.

**NOTE:** You MUST be authorised to use this program. If you are not then you should not proceed any further, close the web browser to exit at this stage by clicking on the at the top right of the screen. Clicking submit at this stage begins the audit trail process.
4. THE MAIN SCREEN

This is the EDM Home Screen.

On the EDM Home Screen you can:

- Set preferences such as password and links
- Access the Help Section
- Search for a Patient
- Use Census/Schedule information (Consultant Only)
4.1. Navigation

The Navigation Menu can be found on the Main Screen at the top of the left hand side menu section.

The Navigation Menu allows a user to move through the EDM Screens. It does this by tracking all of the steps a user makes to offer a previous screen. For example when a user signs on to EDM the only backwards step to take is to Sign Off the system so the Navigation menu will only show the option Sign Off.

The options in the Navigation Menu will change as the user begins to use EDM.

*Note: You must use the Navigation menu to move backwards through screens and not the 'Back' button on the Internet Explorer tool bar.*
4.2. Changing Password

To Change your password:

- Click on the Password link in your preferences section (left hand side of the screen)

- Enter new password and enter again into box below

- Click on Submit

Note: Your password change will be effective the next time you log into EDM.
5. HELP

The Help Section can also be found on the Main Screen in the left hand side menu.

The Help Section consists of:

- A link to the ICT Training Department website where both this Quick User Guide and the Detailed User Guide are available. 
  
  Click User Guide to access this Help option.

- A link to e-learning. The e-learning is based within the Moodle website. Users can click the Self-Register button to gain access to Moodle.
  
  This e-learning can be used for:
  - New Users
  - Re-fresher training
  - Guidance for existing users.

  Click Tutorial to access this Help option.

For any queries relating to Moodle e-learning please contact the ICT Training Department on QAH (7700) x5867.
6. SEARCHING FOR A PATIENT

To **Search** for a patient enter the appropriate Patient information into the **Patient Search box** found in the **Centre of the Main Screen** (as shown below) and click the **Search for Patient** button.

Like PAS the **Recommended Search Procedure** for Searching for a Patient is to use the following information:

- Surname
- First Initial of First Name
- Date of Birth
- Sex

EDM also offers the option to search for a patient using an **NHS Number**.
6.1. The results

After clicking the **Search for Patient** button on the **Main Screen** EDM will return all of the patients that **match the Search Criteria** entered *(as shown below)*.

![Image of EDM interface showing search results for Jessica Knightingale]

**Note:** The Navigation options have changed. You now have the option of returning to the Patient Search Screen (Main Screen). To do this click Patient Search in the Navigation Menu.

The above Search for Jessica Knightingale with the D.O.B 11-10-1940 has returned one result.
7. VIEWING PATIENT DEMOGRAPHICS

To view a Patient’s Demographic details, click on their Name on the Results Screen (as shown below).

That will then open the Demographics Screen (as shown below)

If any changes need to be made to a Patient’s Demographic details the changes must take place in PAS (Add & Revise) this will then automatically update in EDM.

To return to the Search Results Screen Click the ‘Go Back’ button at the top of the screen.

The Circles and Triangles (shown left) highlight any Special Information that you may need to know about a Patient, each one means something different. Hover over them with your mouse for an explanation.

If the shapes are white in colour it means that this does not apply to the patient. If the shapes are coloured in red it means that this does apply to the patient.
9. VIEWING THE MEDICAL RECORD

9.1. Episodes Screen

To Open a Patient’s Medical Record click the yellow folder to the left hand side of their name (as shown below).

This will then Open a Patient’s electronic Medical Record on Screen (as shown below).

Jessica Knightingale’s record has only one inpatient episode.
9.2 Opening an Episode

To Open an Episode click the Yellow coloured lightning bolt to the left hand side of the Episode (as shown below).

Note: you can still access Patient Demographics by clicking on the Patient’s name at the top of your screen.

Name: KNIGHTINGALE JESSICA  Address: 23 VIGGEN VALE  City: NORTH END  Post Co

Int Ref#: 11104021  NHS#: 254 879 6532  D.O.B.: 11-10-1940  Sex: F  Status: ☐ ☐ ☐

<table>
<thead>
<tr>
<th>Display Record(s)</th>
<th>Select All</th>
<th>Reset</th>
<th>Separator Sheet</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Fast</th>
<th>Description</th>
<th>Event Date &amp; Time</th>
<th>Discharge Date</th>
<th>PT</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ B</td>
<td>No Diagnosis</td>
<td>15-03-2008 00:00</td>
<td>- -0</td>
<td>IP</td>
</tr>
</tbody>
</table>
9.3. Viewing a Document

This is the Document View Screen, this will allow the user to view all of the documents within the select Episode(s).

The toolbar (above) will allow the user to print a document (where necessary), turn pages using arrow left and arrow right and zoom in and out (make bigger or smaller) using the + &- button.

Note: This document is upside down; you may come across this occasionally when viewing records. To rotate a document right click anywhere on the document and select ‘rotate’. Keep doing this until the document is the correct way round.

The bottom left corner of the screen has a list of all of the different documents within the Episode. The top document (most recent) will be displayed when the Episode is first opened. To view a different document the user must click onto a different document in the bottom left corner.
10. B-FORMS

B-Forms are Bar-coded Forms. B-Forms are how new notes are added to the Patient’s Medical Record, the Bar code identifies the Patient and the Episode when the new notes are scanned.

B-forms can be printed from two different screens within EDM:

The Document View Screen (as shown below):

Click the Print B-Forms button as shown above to select a B-Form and Print.
Or from the Episode Selection Screen (as shown below):

Click the ‘B’ next to the Episode to be added to, to select a B-Form and Print.

The next Screen within the B-forms (from both ways of access) will require a Group to be selected as different Groups will have access to print different forms.

Using the drop down arrow Select the appropriate Group (as shown left).
When a Group has been selected from the drop-down menu, a list of all of the B-Forms for that Group to use will be displayed (as shown below).

The 'All' Group will bring up all B-Forms available for All Groups.

Click the B-Form to be printed.

Select B-Form Output Queue

- EYE
- EDM
- ICT
- ICTT

Output Queues

- QGPL/ICTT104263
- QGPL/ICTT111580
- QGPL/ICTT705097
- QGPL/ICTT705098
- QGPL/ICTT705106
- QGPL/ICTT901100

The next screen requires a printer to be selected.

Click the arrow next to the department the printer is within to reveal a list of printers to choose from.

Printers are labelled by KB Number, which can be found on a sticker on the printer.

Click the circle next to the selected printer and click print at the top of the list. This will then print the B-Form.
11. SEPARATOR SHEETS

Separator Sheets are used to scan documents to be added to a Patient’s Medical Record that have not been recorded on B-Forms. Separator Sheets are attached to the front of non-bar-coded documents to provide a bar-code for scanning.

To print a Separator Sheet click on the 'Separator Sheet' button from the Episodes Screen (as shown below)

Click in the circle next to the Separator Sheet to be printed and click the 'Submit' button.
The next screen requires an Episode, for the document to be added to, to be selected.

To **Select an Episode** click into one of the circles to the left of the Episode the document is to be added to.

**Choose a printer using the drop down menu.**

Then **click** the ‘Submit’ button at the top of the screen.

*(as shown below)*

![Electronic Health Record](Electronic+Health+Record.png)
12. CENSUS (CONSULTANT ONLY)

12.1. Census Data

Census Data can be seen from the Main Screen for Consultants only. Census Data is taken from PAS and provides a quick access menu of patients to a Consultant.

There are different tabs within the Census Data field (as shown below).

Inpatient Census Data: Quick access menu to Inpatients under the given Consultant within the last 10 days.

Outpatients Census Data: Quick access menu to Outpatients under the given Consultant within the last 10 days.

Recent Discharge Census Data: Quick access menu to Recently Discharged Patients.

Census Data

Inpatients  Outpatients  Recent Discharge  Ward View

Inpatients in the last 10 days

<table>
<thead>
<tr>
<th>Fast Patient Name</th>
<th>Admit</th>
<th>Ward View Role Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLARKE, MARIE</td>
<td>29-02-2008</td>
<td>TT, AT, TRAIN</td>
</tr>
<tr>
<td>ELLIOTT, JOHN</td>
<td>10-03-2008</td>
<td>AT</td>
</tr>
<tr>
<td>KNIGHTINGALE, JESSICA</td>
<td>15-03-2008</td>
<td>AT</td>
</tr>
</tbody>
</table>

To move between the tabs click the appropriate link (as shown above)

Ward View Census Data: Quick access menu to patients by Ward.

Census Data

Inpatients  Outpatients  Recent Discharge  Ward View

All TT

<table>
<thead>
<tr>
<th>Fast Patient Name</th>
<th>Admit</th>
<th>Ward View Role Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLARKE, MARIE</td>
<td>29-02-2008</td>
<td>TT, AT, TRAIN</td>
</tr>
<tr>
<td>ELLIOTT, JOHN</td>
<td>10-03-2008</td>
<td>AT</td>
</tr>
<tr>
<td>KNIGHTINGALE, JESSICA</td>
<td>15-03-2008</td>
<td>AT</td>
</tr>
</tbody>
</table>

Patients in Ward View can be viewed by 'All' wards given access to or by ward name, in this example ward 'TT'.
12.2. My Schedule

'My Schedule’ can also be seen from the Main Screen by Consultants only. The Schedule information is Outpatient appointments fed into EDM from PAS. If any changes need to be made to the Schedule this can only be done in PAS.

My Schedule (as shown below) gives an easy access menu to all Patients due to be seen.

There are two tabs in the Schedule section:

My Schedule: the given Consultant’s schedule only

All: the schedule for all Consultants in the Group assigned to the given Consultant.

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Appointment Type</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/04/2008</td>
<td>KNIGHTINGALE JESSICA</td>
<td>FOLLOW UP</td>
<td>BUM 12:00</td>
</tr>
<tr>
<td>29/04/2008</td>
<td>WELLNESS PIPPI</td>
<td>FOLLOW UP</td>
<td>XY1 10:00</td>
</tr>
<tr>
<td>02/05/2008</td>
<td>WELLNESS RYAN</td>
<td>FOLLOW UP</td>
<td>AB1 12:30</td>
</tr>
<tr>
<td></td>
<td>WELLNESS SALLY</td>
<td>FOLLOW UP</td>
<td>EYE 10:15</td>
</tr>
<tr>
<td></td>
<td>WELLNESS HARRISON</td>
<td>Recurring</td>
<td>EYE 1500</td>
</tr>
</tbody>
</table>
12. FAULT REPORTING

Contact ICT Service Desk

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:ict.servicedesk@porthosp.nhs.uk">ict.servicedesk@porthosp.nhs.uk</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>PHT network users</td>
<td>023 9268 2680 or SJH (7703) 2680.</td>
</tr>
</tbody>
</table>

Some of the reasons you may need to contact the ICT Service Desk:

- EQUIPMENT FAILURE
- SOFTWARE PROBLEMS
- SCREEN FREEZES
- PASSWORD NON-ACCEPTANCE *

You will need to give the Service Desk certain information, so always ensure you have the following information available. They may need to know:

- Your Username.
- The KB Number of the equipment. This is found on a small label (usually red or blue) stuck to the equipment.
- The function set and function you were working in.
- The patient’s details e.g. casenote no.
- Exactly what you were attempting to do, e.g. log on, admit patient, register patient.

12.1. Out of office hours

Contact the ICT Service Desk and leave a message on the answer machine. They will deal with the problem as soon as they can. Alternatively email them.

If you feel there is a major system problem contact the switchboard for them to contact the engineer on call.
13. HELP WITH USING EDM

If you require additional training, support or help when you are using EDM, please contact the ICT Training Department using the contact information provided below.

<table>
<thead>
<tr>
<th>Email</th>
<th><a href="mailto:ict.training@porthosp.nhs.uk">ict.training@porthosp.nhs.uk</a></th>
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</thead>
<tbody>
<tr>
<td>External Phone</td>
<td>023 9228 6000</td>
</tr>
<tr>
<td>Internal Phone</td>
<td>QAH (7700) 5867</td>
</tr>
</tbody>
</table>
## VERSION CONTROL/LOG

<table>
<thead>
<tr>
<th>Manual</th>
<th>EDM User Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version</td>
<td>V.1</td>
</tr>
<tr>
<td>Date</td>
<td>April 2008</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Revisions</th>
<th>Pages</th>
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<td></td>
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