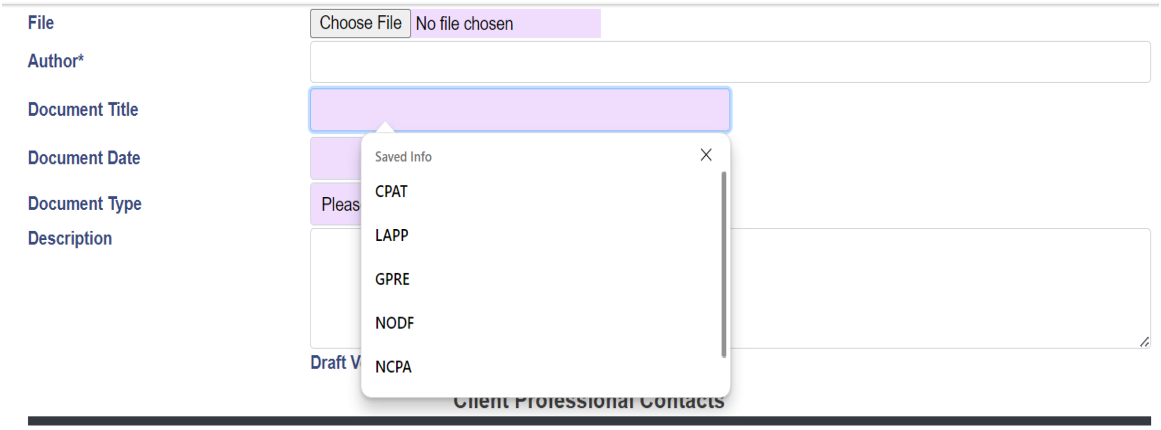
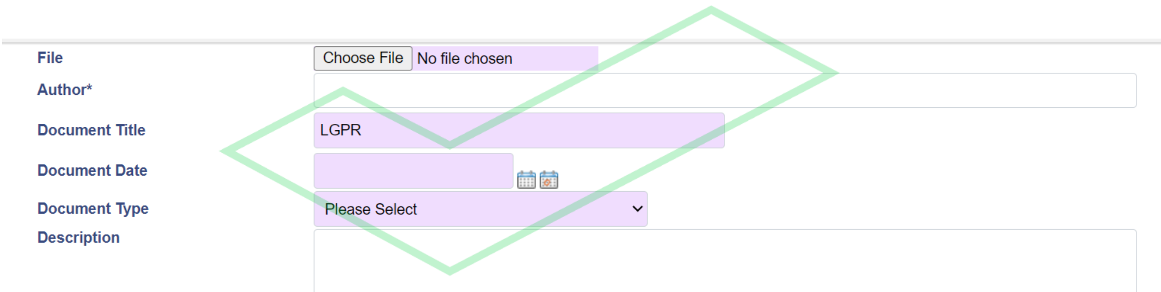
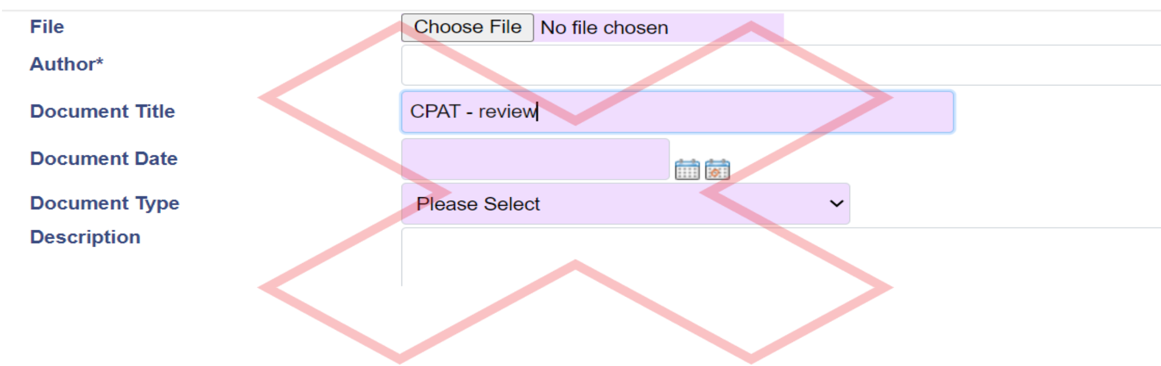
Document Upload

Uploaded documents **MUST** follow the policy for uploading documents to RIO and can **ONLY CONTAIN A 4 LETTER CODE**. Anything other than the 4-letter code from the RiO help menu will not be identified for reporting purposes.







1. Navigate to the client's **Case Record** (Clinical Portal – Client's View) screen.
2. On the left hand side, click on the **Documents and Editable Letters** folder under the **Case Record Menu** section.
3. The folder is expanded to display its content.
4. Click on <u>Document Upload</u>.
5. The **Document Upload** screen is displayed.

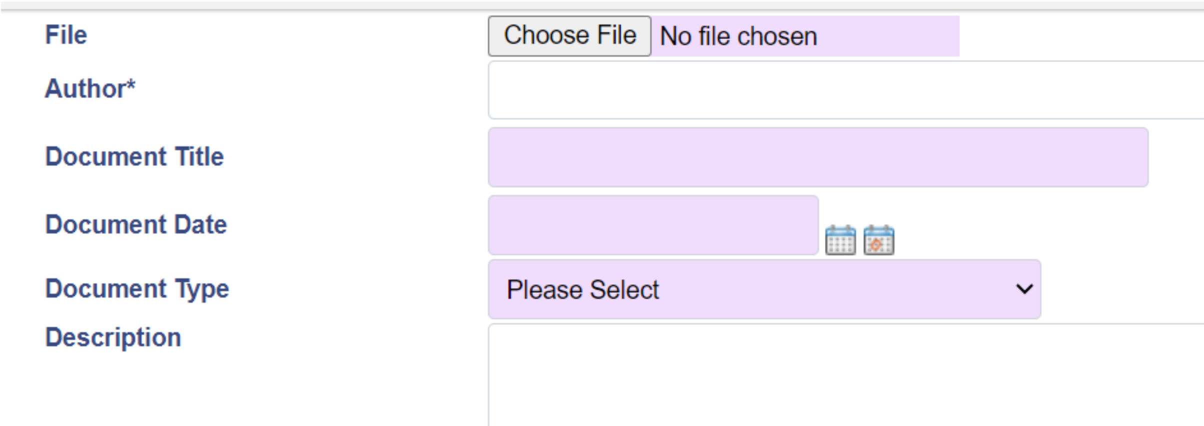
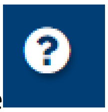
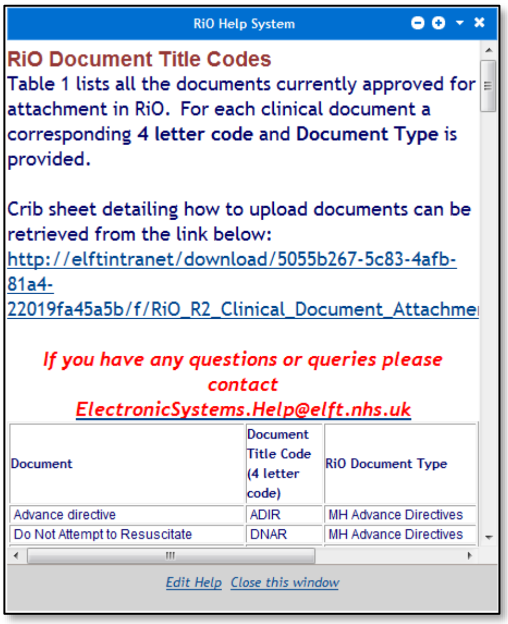


Figure 1 - Document Upload

6. Complete the fields as follows:
    a. **Browse**: Search for and locate the document you wish to upload.
    b. **Author**: If you are originator of the document leave the field blank (your name will be added by default) otherwise enter the name of the person who created the document.
    c. **Document Title**: Enter the title of the document; using the file naming convention listed in the **Help** section.
7. Click on the  **Help** icon above the client's name towards the top left hand corner of the screen.
8. The **RiO Help System** dialog box is displayed.



RiO Help System

RiO Document Title Codes

Table 1 lists all the documents currently approved for attachment in RiO. For each clinical document a corresponding **4 letter code** and **Document Type** is provided.

Crib sheet detailing how to upload documents can be retrieved from the link below:
http://elftintranet/download/5055b267-5c83-4afb-81a4-22019fa45a5b/f/RiO_R2_Clinical_Document_Attachme

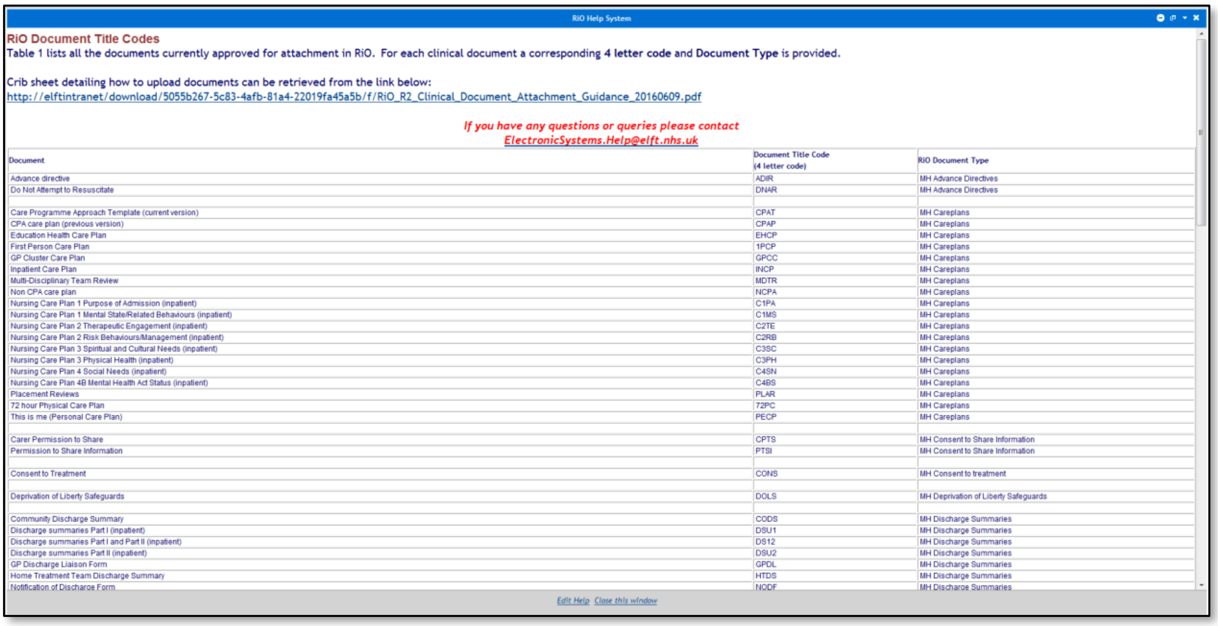
If you have any questions or queries please contact ElectronicSystems.Help@elft.nhs.uk

Document	Document Title Code (4 letter code)	RiO Document Type
Advance directive	ADIR	MH Advance Directives
Do Not Attempt to Resuscitate	DNAR	MH Advance Directives

Edit Help Close this window

Figure 2 - RiO Help System dialog box

9. Click on the  icon in the title bar area to expand.
10. The screen is displayed in full.



RiO Help System

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If you have any questions or queries please contact ElectronicSystems.Help@elft.nhs.uk

Document	Document Title Code (4 letter code)	RiO Document Type
Advance directive	ADIR	MH Advance Directives
Do Not Attempt to Resuscitate	DNAR	MH Advance Directives
Care Programme Approach Template (current version)	CPAT	MH Careplans
CPA care plan (previous version)	CPAP	MH Careplans
Education Health Care Plan	EHCP	MH Careplans
First Person Care Plan	1PCP	MH Careplans
GP Cluster Care Plan	GPCC	MH Careplans
Inpatient Care Plan	INCP	MH Careplans
Multi-Disciplinary Team Review	MDTR	MH Careplans
Non CPA care plan	NCPA	MH Careplans
Nursing Care Plan 1 Purpose of Admission (inpatient)	C1PA	MH Careplans
Nursing Care Plan 1 Mental State/Related Behaviours (inpatient)	C1MS	MH Careplans
Nursing Care Plan 2 Therapeutic Engagement (inpatient)	C2TE	MH Careplans
Nursing Care Plan 2 Risk Behaviours/Management (inpatient)	C2RB	MH Careplans
Nursing Care Plan 3 Spiritual and Cultural Needs (inpatient)	C3SC	MH Careplans
Nursing Care Plan 3 Physical Health (inpatient)	C3PH	MH Careplans
Nursing Care Plan 4 Social Needs (inpatient)	C4SN	MH Careplans
Nursing Care Plan 4B Mental Health Act Status (inpatient)	C4BS	MH Careplans
Placement Reviews	PLAR	MH Careplans
72 hour Physical Care Plan	72PC	MH Careplans
This is me (Personal Care Plan)	PECP	MH Careplans
Carer Permission to Share	CPTS	MH Consent to Share Information
Permission to Share Information	PTSI	MH Consent to Share Information
Consent to Treatment	CONS	MH Consent to treatment
Deprivation of Liberty Safeguards	DOLS	MH Deprivation of Liberty Safeguards
Community Discharge Summary	CODS	MH Discharge Summaries
Discharge summaries Part I (inpatient)	DSU1	MH Discharge Summaries
Discharge summaries Part I and Part II (inpatient)	DS12	MH Discharge Summaries
Discharge summaries Part II (inpatient)	DSU2	MH Discharge Summaries
GP Discharge Liaison Form	GPDL	MH Discharge Summaries
Home Treatment Team Discharge Summary	HTDS	MH Discharge Summaries
Notification of Discharge Form	NODF	MH Discharge Summaries

Edit Help Close this window

Figure 3 - Expanded RiO Help System dialog box

11. The table lists the different types of documents that are currently approved for uploading.

If a clinical document that needs to be attached to the client's record does not appear in the list, a request for the creation of a new **Document Title Code** [4 letter code] should be logged by emailing the helpdesk: elft.clinicalsystems@nhs.net

12. Each document has an associated **Document Title Code** in the 2nd column and a **RiO Document Type** in the 3rd column.
13. To search more easily for the required document code, press **CTRL + F** on your keyboard.
14. The **Find** facility is displayed at the top of the screen.

Figure 4 - Find facility

15. Enter the name of the document you wish to upload e.g. initial assessment.
16. If found, the cursor will highlight the words.
17. Scroll through the list to find the required document.
18. Make a note of the 4 letter document code from the 2nd column e.g. INAS and the document type found in the 3rd column e.g. Reports/Assessments.
19. Click on the **Close** button at the top right hand corner of the **RiO Help** screen.
20. Enter the 4 letter code into the **Document Title** field.
21. Select the appropriate **Document Type**.
22. Although not mandatory, please enter a **Description**, this will help to identify the document more easily when viewing the document in the **Document List View** screen.
23. Click on **Upload Document**.
24. The following **Information** dialog box is displayed.

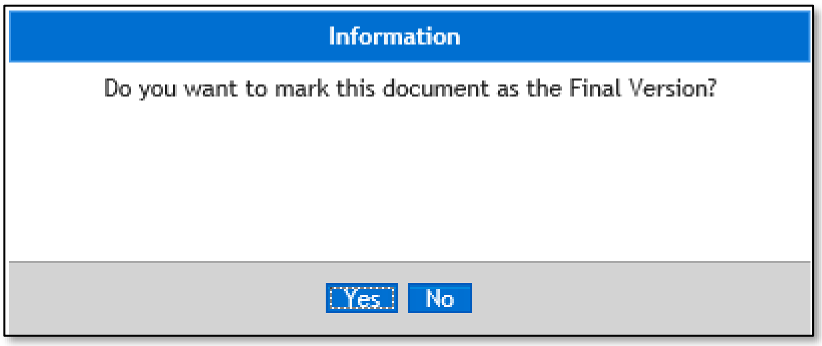

Figure 5 - Information dialog box

25. Click on **Yes**.

Users MUST always select **Yes** when the dialog box is displayed, as all documents are uploaded as **Final Version** since no further amendments should be made.

26. The following dialog box is displayed.

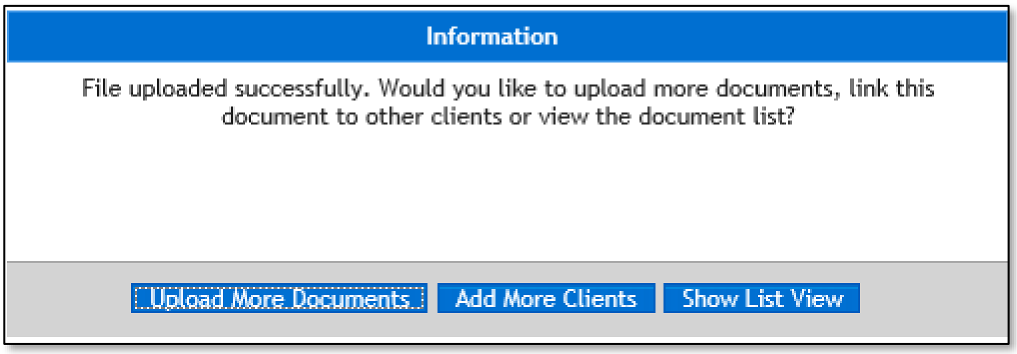

Figure 6 - Information dialog box

27. There are 3 options:
    a. **Upload More Documents**: Return to the **Document Upload** screen to continue uploading documents for the existing client.
    b. **Add More Clients**: Upload the same document for one or more other clients.
    c. **Show List View**: To view the uploaded document for the existing client.
28. Select the appropriate option.

> If you upload a document to the incorrect client's case record or upload the incorrect document please contact the Electronic Systems Helpdesk to request its removal.

Viewing an Uploaded Document

1. Navigate to the client's **Case Record** (Clinical Portal – Client's View) screen.
2. On the left hand side, click on the **Clinical Documentation** folder under the **Case Record Menu** section.
3. The folder is expanded to display its content.
4. Click on Document List View.

OR ALTERNATIVELY

5. At the top right hand corner click on the shortcut 

menu and select **Document List View**.
6. The **Documents** screen is displayed, listing any uploaded documents to the left of the screen, with a panel where the uploaded document will be displayed to the right.

Title	Document Date
GPRE	14 May 2024
Final Version	
GPRE	9 May 2024
Final Version	

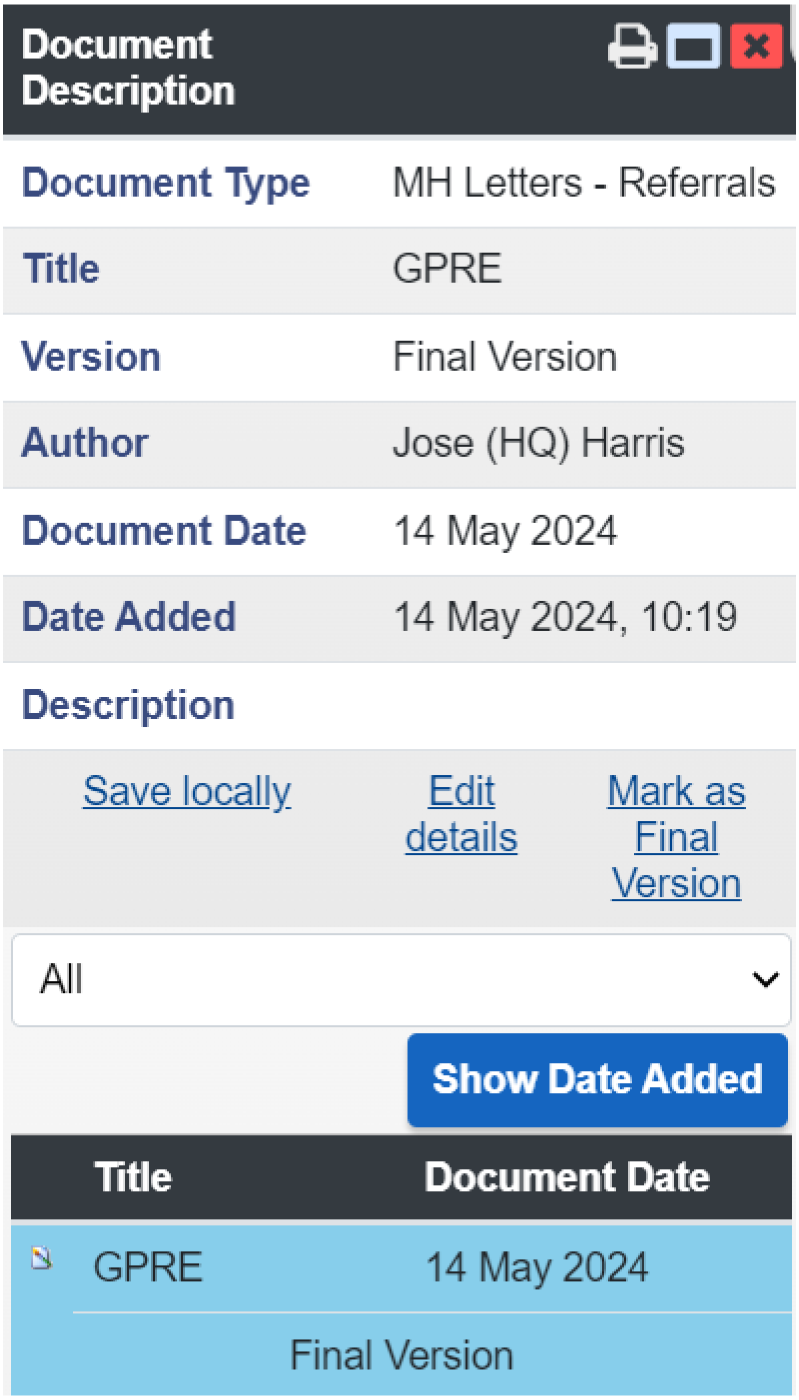

Figure 7 - Documents

7. The **Show Date Added/Show Document Date** buttons alternate between the date on the document and the date the document was uploaded.
8. The drop down box above the buttons allow you to filter by the type of document you wish to view e.g. Reports/Assessments.

Upon entering the **Documents** screen, documents will be initially displayed according to the date of the document.

9. To view a document, click on the **Title** of the document.

Depending on the type of document uploaded and your browser configuration, the document may open in the panel to the right, or you may be prompted to open the document in an external application. Depending on the size of the document, it may take some time for it to appear.

10. Follow the onscreen instruction to open the document.
11. Once viewed, close the document by clicking on the **Close** button at the top right hand corner of the screen.