



# CLINICAL PORTAL

*Digital platform for our future*

## View Only User Guide

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**Privacy Note:** All screenshots captured within this document have been taken within the Clinical Portal test environment and relate to fictitious patients and records

## Login


Select Hawke's Bay DHB from the Organisation drop down menu then login using your network credentials. Your password will automatically update when your network password is changed.


**Note:** You can only log into one Clinical Portal session at a time. You must log out when you have finished a session.


### Central Region Clinical Portal


**i** You are reminded that your access to patient clinical records is restricted to those patients for whom you are involved in the delivery of healthcare. Access for other reasons is not permitted and will be regarded as a disciplinary matter, with risk to your employment and professional registration. Please note that there is an audit of all access to patient data via the Clinical Portal.


Organisation   
 User ID   
 Password


  
MidCENTRAL DISTRICT HEALTH BOARD  
Te Pae Hauora o Ruahine o Iorangi

  
WHANGANUI  
DISTRICT HEALTH BOARD  
Whanganui Whanganui

  
HAWKE'S BAY  
DISTRICT HEALTH BOARD


  
Wairarapa DHB  
Wairarapa District Health Board

  
HUTT VALLEY DHB

  
Capital & Coast  
District Health Board  
ŪPOKO KI TE URU HAUKA

## Homepage

Once you have logged into Clinical Portal you will be presented with your homepage:

Home | Help
Catherine Griffiths ▼
Logout


- ▶ PATIENTS
- Demographic Search
- Current Inpatient Search
- Outpatient Search
- ED Patient List
- Recent Patients
- ▶ WORKLISTS
- ▶ TASKS
- ▶ MESSAGING
- ▶ LINKS
- ▶ REPORTS
- ▶ USER SETTINGS

### Recent Patients

Recent Patients [Remove Sorting](#)

<input type="checkbox"/>	NHI	Patient Name ▲	Sex	Age	Deceased	⚙
<input type="checkbox"/>	ZZZ0075	BEE, Bumble	F	16 years 11 months	-	-
<input type="checkbox"/>	WON4255	CADBURY, Orange Twirl	F	7 years 9 months	-	-
<input type="checkbox"/>	GGY4408	CLINICAL-PORTALW, Test	M	42 years	-	-
<input type="checkbox"/>	ZAA1691	COFFEE, Cup	M	18 years	-	-
<input type="checkbox"/>	IPO1890	COLEMAN, Joseph Lucia	I	73 years	-	-
<input type="checkbox"/>	OPO1538	DUKE, Miles	M	78 years	-	-
<input type="checkbox"/>	AAC2369	WHITE, Simone	F	40 years	-	-

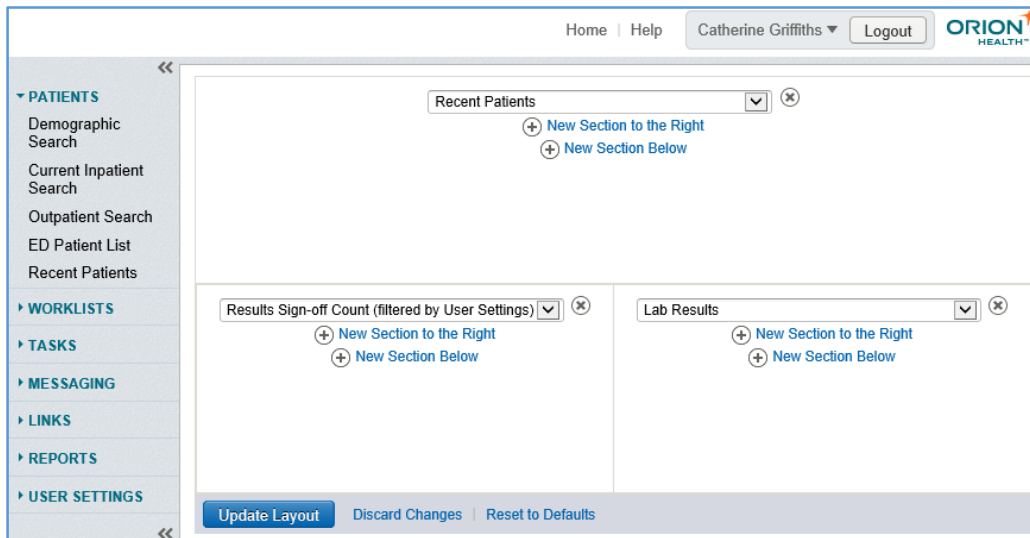
None selected

Showing 7 of 7

### Results Sign-off Count (filtered by User Settings)

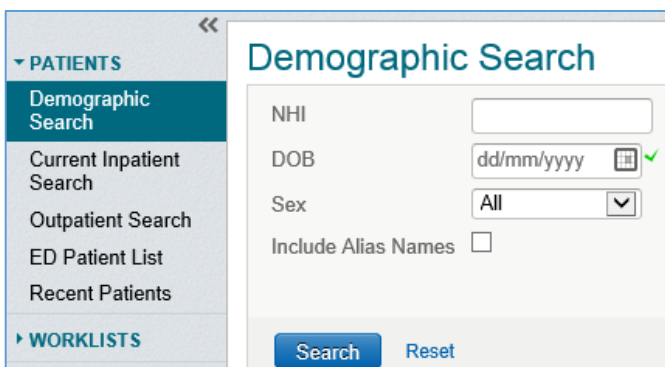
Visit Type	Histology	Laboratory	Radiology
Emergency	0	0	0
Inpatient	0	0	0
Outpatient	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>

You can change the configuration of your homepage by clicking the **Configure Layout** button at the bottom of the page. Choose to display any preferred tables of information, in any order you want to see them.




## Patient Searches & Lists

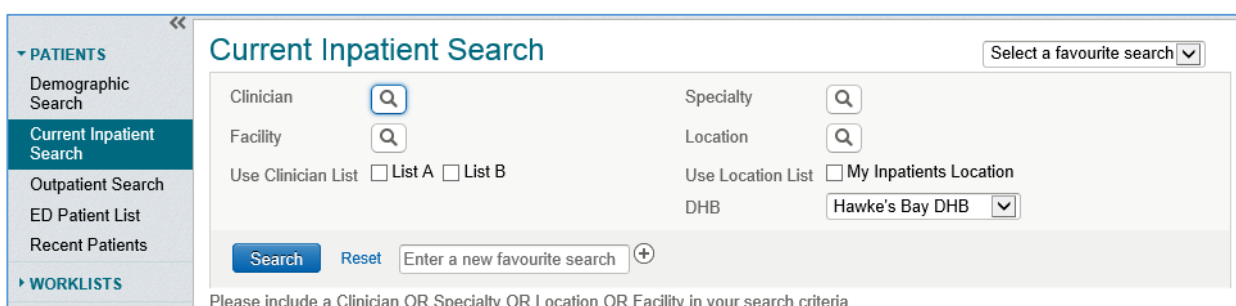
To search for a patient, you can select options under Patients in the menu located on the left-hand side of your homepage:



There are several ways of searching for a patient:

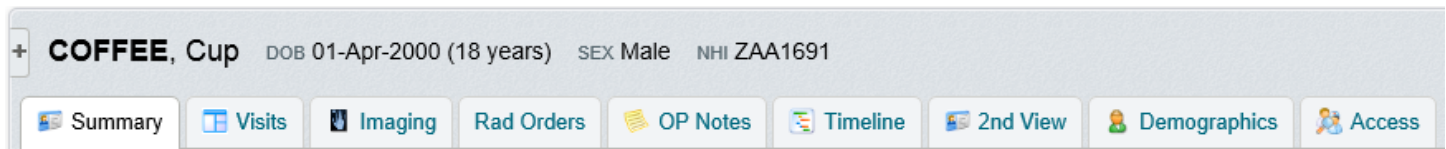
- **Demographic Search** – Use patients NHI, Name and/or date of birth to search.
- **Current Inpatient Search** – Generate a list of current inpatients. You can filter by Clinician, Facility, Speciality or Location.
- **Outpatient Search** - Generate a list of outpatients. You can filter by Clinician, Clinic, Speciality, DHB & date.
- **ED Patient List** – Shows all patients that are or have been in ED today.
- **Recent Patients** – The Recent Patients list is automatically populated with the names of the last 50 patients you have viewed.

Favourite Searches can be created in both Current Inpatient and Outpatient Searches. Enter a name for the search, then click 



## Viewing Patient Information

Selecting a patient from any list or search will open the patient's record. In the example below you will see a number of tabs containing clinical information. Your access may differ depending on the level of access associated with your role, which will affect the tabs that you see.



All activity is displayed in clean, clearly labelled tabs and holds different functionality:

- ★ **Summary** – Displays alerts, CDV Tree and Patient Access Summary
- ★ **Visits** – Shows current visit, visit history and any radiology orders
- ★ **Imaging** – Allows you to search for any images against the patient
- ★ **Rad Orders** – Used for ordering radiology against an encounter
- ★ **OP notes** – Displays any outpatient notes recorded against the patient
- ★ **MH IP Notes** – Displays notes relating to Mental Health admissions
- ★ **Timeline** – A graphic representation of the clinical record
- ★ **Flowsheets** – Displays preconfigured laboratory result profiles e.g. Common Bloods, Diabetes, and Renal.
- ★ **2<sup>nd</sup> View** – Opens a duplicate of patient record in a new window
- ★ **Demographics** – Displays patient contact details
- ★ **Unapproved Docs** – Transcribed documents pending approval
- ★ **Access** – Displays access history – anyone who has accessed the patient record in the last 30 days

*More information on each of these tabs is provided in the following pages*

### ★ Patient Summary Tab

Selecting a patient from any patient search, worklist or recent patient list will open the patient's record and default to the Patient Summary tab. The windowlets displayed in the Patient Summary tab are:

- **Patient Access Summary:** Displays the user currently logged in and the last five users to have assessed the patient record. A more detailed history is available in the Access tab (see page 14)
- **Alerts:** Local alerts are sourced from webPAS when available.
- **NHI Medical Warnings:** Information appearing in this panel is automatically retrieved from the Ministry of Health and relates to adverse medical reactions and significant medical conditions. The data displayed is read only and can only be updated at the source. If there are no medical warnings associated with a patient's record a message stating this will appear.

*See screenshot over page*

**DUKE, Miles** DOB 06-Mar-1940 (78 years) SEX Male NHI OPO1538 INPATIENT ED X < >

Summary Visits Imaging Rad Orders Timeline 2nd View Demographics Access

Some items are not shown due to privacy restrictions.

**Document View** Showing {0} of {1} All Group By Category Sort by Date

**Patient Access Summary**

The following users have recently opened this patient record:  
 Cat Test (cattest) (Current) Carol McLean (mcleanc) Catherine Griffiths (cgriffit) Catherine Griffiths (cgriffiths) Sonja Dekker (sdekker) Susan Stewart (sustewar)

**Alerts**

Alert	Type	Date of Alert	Source (DHB)
Aspirin	Drug reactions	04-Sep-2017	Whanganui DHB
CYPF Act - S178	Legal Status	04-Sep-2017	Whanganui DHB

**NHI Medical Warnings**  
 Unable to display NHI Medical Warnings for patient OPO1538. [30170-E-HCU Id does not exist in the HCU table]

**Patient Summary**  
 ▶ Care Plans (2 / 2)  
 ▶ Clinical Investigations (2 / 2)  
 ▶ Clinical Letters (47 / 47)  
 ▶ Clinical Other (62 / 62)  
 ▶ Discharge Summaries (1 / 1)  
 ▶ Emergency Department (1 / 1)  
 ▶ Growth Charts (12 / 12)  
 ▶ Growth Observations (22 / 22)  
 ▶ Laboratory (7 / 8)  
 ▶ Legal (1 / 1)  
 ▶ Medications (1)  
 ▶ Operation Notes (1 / 2)  
 ▶ Radiology (10 / 10)

### ★ Clinical Document Viewer aka CDV Tree

The CDV Tree is displayed in the **Summary** tab and provides a list of a patient's documents. The CDV Tree is categorised in folders that allow users to have direct access to information such as discharge summaries, clinical letters, laboratory results and radiology results from across the central region.

**Document View** Showing {0} of {1} All Group By Category Sort by Date

**Patient Summary**

- ▶ Primary Care Record
  - ▶ **Care Plans (2 / 2)**
  - ▶ **Clinical Investigations (1 / 1)**
  - ▶ **Clinical Letters (46 / 46)**
  - ▶ **Clinical Other (62 / 62)**
  - ▶ **Clinical Outpatient Notes (72 / 72)**
  - ▶ **Discharge Summaries (1 / 1)**
  - ▶ **Emergency Department (1 / 1)**
  - ▶ **Growth Charts (12 / 12)**
  - ▶ **Growth Observations (22 / 22)**
  - ▼ **Laboratory (8 / 8)**
    - ▼ **Biochemistry (6 / 6)**
      - 15-Nov-2017 **Cardiac (1 / 1)** Brook
      - 21-Jun-2017 **Cardiac Profile (1 / 1)**
      - 02-Jun-2017 **\* Diabetes (1 / 1)** Aan
      - 01-Jun-2017 **Sendaway (1 / 1)** Kra
      - 02-Feb-2017 **CT Cardiac (2 / 2)** Lid
    - ▶ **Histology (1 / 1)**
    - ▶ **Serology/Virology (1 / 1)**
  - ▶ **Legal (1 / 1)**
  - ▶ **Medications (1 / 1)**
  - ▶ **Operation Notes (2 / 2)**
  - ▶ **Radiology (10 / 10)**

Choose how you wish to view information in the CDV Tree:  
**Show:** All, or specific range  
**Group By:** Category, Date, Service or Author  
**Sort By:** Date, Title or Author

Search the CDV Tree

Takes you back to the original layout

Document count shows overall number of documents. Bold indicates amount of unread documents.

Pen icon indicates unsigned results.

Bold, red font indicates an abnormal result.

### How to interpret the CDV Tree:

Item	Item	Style	Example
<b>Documents</b>	Read/Unread document count	(xx unread/xx total results)	▶ <b>Administration (11 / 26)</b>
	Interim document	Italics	<i>Adult Discharge Summary Dr NZCIS Doctor</i>
	Final document (unread)	Bold font	<b>12-Feb-2015 Adult Discharge Summary Dr NZCIS</b>
	Final document (read)	Normal font	09-Sep-2005 Adult Discharge Summary 2.0 Doctor
<b>Lab reports</b>	Interim lab report	Item name in Italics	18-Mar-2014 <i>CRP Group</i> John Cardinal
	Final lab report (read)	Normal font	10-Dec-2014 Cardiac Hone Ropata
	Abnormal lab report (unread)	Report name in red font bold, date and author in light grey bold. One asterisk before report name	∅ 11-Feb-2009 * <b>Midstream Urine</b> Dr Timothy Ora
	Abnormal lab report (read)	Report name in red font, date, author in light grey. One asterisk before report name	11-Feb-2009 * <b>Electrolytes</b> Dr Timothy Orange
<b>Interpreting lab report</b>	Unread	Report name in blue font, date and author in light grey	13-Jan-2008 <b>Chest X-Ray</b> Dr Alerberto Jose
	Read	Report name in blue font, date and author in light grey	09-Feb-2009 <b>Chest CT</b> Dr Timothy Orange
	Abnormal	Report name in red font, date and author in light grey. One asterisk before report name	25-Feb-2008 * <b>Chest CT</b> Dr Timothy Orange

## ★ Visit Summary Tab

**DUKE, Miles** DOB 06-Mar-1940 (78 years) SEX Male NHI OPO1538 INPATIENT  ED

Summary Visits Imaging Rad Orders OP Notes MH IP Notes Unsigned Results Timeline Flowsheets 2nd View Demographics More

### Current Visit

Visit Type	IP	Admission	03-Feb-2017 11:11
Admit Reason	Unhappy	Status	Admit
Specialty	Neonate SCBU L2	Clinician	Kim DRAPER
Location	132-919A1, Waim Baby Ward	Facility	Whanganui Hospital, Whanganui DHB
Encounter ID	MIPO21253		

### Radiology Procedures

Visit Type	Modality	Procedure	Ordering clinician name	Scheduled date time	Status
IP	Dexa	Dexa	Test User215		PLACED
CO	Ultrasound	Pelvis	DANEBY LIDDELL		IN_PROCESS
CO	Ultrasound	Pelvis	DANEBY LIDDELL		IN_PROCESS

### Visit History

All | Inpatient | Outpatient | ED

Visit Type	Status	Admission	Discharge	Admit Reason	Primary Discharge Diagnosis	Specialty	Clinician	Facility	DHB	Links
OP	Cancelled	08-May-2017		Unhappy	DROWNING AND SUBMERSION, UNDETERMINED INTENT, SCHOOL, OTHER INSTITUTION AND PUBLIC ADMINISTRATIVE AREA, WHILE WORKING FOR INCOME	ID Short-term Care	Kim DRAPER	Whanganui Hospital	Whanganui DHB	
OP	Booked	15-Mar-2017		Unhappy	DROWNING AND SUBMERSION, UNDETERMINED INTENT, SCHOOL, OTHER INSTITUTION AND PUBLIC ADMINISTRATIVE AREA, WHILE WORKING FOR INCOME	MH Psychogeriatric	Nigel BROOKE	Whanganui Hospital	Whanganui DHB	
IP	Admitted	03-Feb-2017		Unhappy	DROWNING AND SUBMERSION, UNDETERMINED INTENT, SCHOOL, OTHER INSTITUTION AND PUBLIC ADMINISTRATIVE AREA, WHILE WORKING FOR INCOME	Neonate SCBU L2	Kim DRAPER	Whanganui Hospital	Whanganui DHB	
OP	Attended	03-Feb-2017		Unhappy	Free Text Diagnosis	Neonate SCBU L2	Kim DRAPER	Whanganui Hospital	Whanganui DHB	
ED	Disch	02-Feb-2017	02-Feb-2017	Unhappy	DROWNING AND SUBMERSION, UNDETERMINED INTENT, SCHOOL, OTHER INSTITUTION AND PUBLIC ADMINISTRATIVE AREA, WHILE WORKING FOR INCOME	Cardiothoracic	Daneby LIDDELL	Whanganui Hospital	Whanganui DHB	

The Visit Summary tab shows the following windowlets:

**Current Visit:** The label in the patient banner displays the type of visit shown in the current visit window. The information in this window displays the details available in webPAS.

**Radiology Procedures:** Displays all scheduled or completed radiology procedures.

**Visit History:** The visit history table includes inpatient, outpatient and emergency department visits. By default all visits will show in one combined table, but you can filter by Inpatient, Outpatient and ED by clicking the column header. **Note:** Upon go-live, there will also be a Referrals filter available.

## ★ Imaging: Visual PACS Integration

There are two ways of that an authorised user can access radiology images within Clinical Portal:

1. With a patient in context in Clinical Portal, a PACS Viewer entry point is invoked when the clinician clicks on the **Imaging** tab.
2. You can also navigate to radiology images from a link on the radiology report page.

**Note:** HBDHB PACS has not been integrated with Central Region Clinical Portal as yet, so when you click on the imaging tab you will receive a 'page cannot be displayed' message.



## ★ Outpatient Notes

**Please Note:** This section is for informational purposes only. Due to the limitations of View Only access, OP Notes tab will not display, but notes can be viewed from the CDV Tree in the **Summary** tab.

**Also Note:** Currently only Whanganui are using this functionality.

Outpatient Notes can be viewed from the CDV tree or by clicking on the Outpatient Notes tab. There are many different search options within this tab to narrow down what you are looking for, such as date, author, discipline, service and note type.

The intention of the Outpatient Note is to record outpatient and community progress information only. The Outpatient Notes function is not to be used for Inpatient or Emergency Department events.

There are many purposes:

- Record an interaction with a patient (clinical visit, phone call, etc.)
- Document a communication with another person, about a patient (phone call with GP)
- Record a treatment or management plan.
- Document a clinical decision.




## ★ Mental Health Inpatient Notes

**Please Note:** This section is for informational purposes only. Due to the limitations of View Only access, MH IP Notes tab will not display, but notes can be viewed from the CDV Tree in the **Summary** tab.

**Also Note:** Currently only Whanganui are using this functionality.

The intention of the Inpatient Note is to record information relevant to the current inpatient event only. Version 1 of IP Notes has been tailored to support the Mental Health Services only. To this end the tab has been called **MH IP Notes** and when selecting a visit (event/encounter) only encounters associated with Mental Health Services are presented for selection.

All users can see a list of IP Notes items in the CDV tree on the Patient Summary tab. When the CDV tree is in Category view these are displayed under Inpatient Notes. There is only one entry for each admission under the admission date. You can also view MH IP Notes by clicking on the MH IP Notes tab. There are search options within this tab to narrow down what you are looking for.




**Document View**   

Showing {0} of {1} All  
Group By Category Sort by Date

- Patient Summary**
- Primary Care Record
- Document Upload Admin
- Document Upload
- Growth Observation
- Add Portal Form
- Assessments (8 / 8)
- Growth Observations (1 / 1)
- Inpatient Notes (1 / 1)**
  - 01-May-2016 Mental Health Treatment
- Laboratory (4 / 4)
- Mental Health (5 / 5)
- Planning (1 / 1)

**TEA, Cuppa (Mr)** DOB 23-Nov-1956 (61 years) SEX Male NHI DLL8537

Summary Visits Imaging Rad Orders OP Notes **MH IP Notes** Unsigned Results

**Inpatient Notes** Document View   

Showing {0} of {1} All  
Group By Encounter Sort by

- Inpatient Notes**
- Print Full Notes
- ▶ 01-May-2016 Mental Health Treatment

**Inpatient Note Summary**

Encounter  Note Type   
 Service  Designation   
 Author  Date Range  to   
 Status  Final  Draft

Enter a new favourite search

Creation Date/Time	Author	Service	Note Type	Designation/Role
24-May-2018 11:43	Test11 WDHB	Mental Health Treatment	Clinical Note	Clin nurse specialis, Wound Nurse
24-May-2018 11:39	Test12 WDHB	Mental Health Treatment	Admission Note	District nurse, District Nurse

## ★ Unsigned Results


**Please Note:** This section is for informational purposes only. Due to the limitations of View Only access, the Unsigned Results tab will not display, but results can be viewed from the CDV Tree in the **Summary** tab. Refer to the table on page 7 (how to interpret the CDV Tree) to see what stage the results are at.


As a clinician, you are required to 'close the loop' on any investigations requested:

When 'signing off' a result you are 'electronically verifying that you've taken the necessary action/s demanded by the result'. You can make comments in the comment box such as 'chest x-ray ordered', referral letter sent etc.

Results requiring sign off will have a pencil  next to them.

To sign off a single result in the patient record, in the CDV tree (in **Summary** tab) click to display the single result you want to sign off. Locate the **Report History** section towards the end of the result, enter a brief note if applicable and then click the sign off button.

To sign off a single result in cumulative view, in the CDV tree click to display the single result you want to sign off, then click Cumulative view. In the **Signed** row, click the **Sign-off** icon  in the column containing the result you want to sign off. The Sign-off screen displays. Enter a brief note in the Comment field if applicable and click the Sign-off button.

To sign off a single result in Flow Sheet view, in the patient record, click the Flowsheets tab, and select the flow sheet you wish to view. Click the **Sign-off** icon  in the column containing the result you want to sign off. The associated result is displayed. Locate the Report History section towards the end of the result. Enter a brief note in the Comment field if applicable and click the Sign-off button. To return to the Flow Sheet, click the Laboratory Results Flow Sheet link.

Only the clinician who originally signed off a result can revert that sign off. When you have completed a sign off, a new entry is added to the top of the Report History. To revert a sign off locate the Report History section towards the end of the result. Select the Revert Sign-Off link in blue. Specify a reason for reverting the sign off and then click the **Revert Sign-off** button.

### Report History

<b>Sign-off by Catherine Griffiths</b>	
Comment	
<input type="text"/>	
<input type="button" value="Sign Off"/>	<input type="button" value="Sign Off and Next"/>
<b>Final Report from MedLab</b>	1 day ago

## ★ Timeline

The Timeline View displays the following categories of data:

- Visits: Inpatient, Outpatient and Emergency
- Documents in the CDV tree (including diagnostic results)
- Orders Summary (Radiology). Please note that if more than one order has been placed on one day, only the first order made on the day will display.

You can interact with timeline views in the following ways:

- ★ View the detail of an individual item in the Timeline by hovering your mouse over the relevant link.

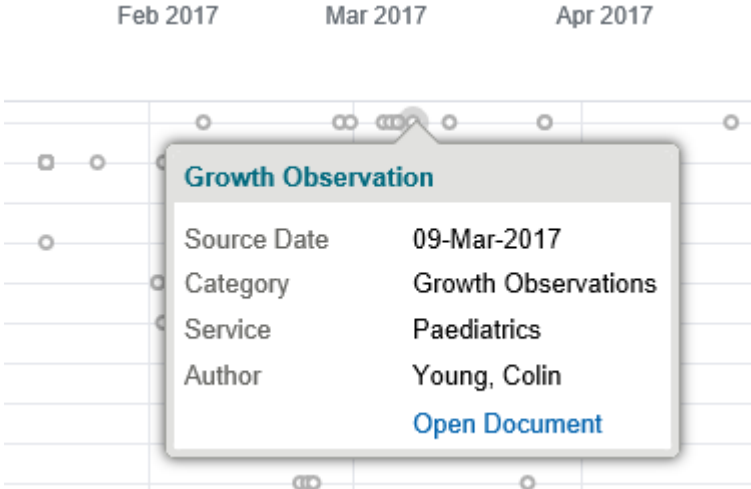


Emergency	
Facility	Whanganui Hospital
Specialty	Emergency Medicine
Date	21-Feb-2017

- ★ Zoom in on a selected time frame. Use your mouse to click and drag to zoom in on a selected time frame. The area you have highlighted will display in blue. Click **Reset Zoom** to return to the full Timeline View.

Showing from 18-May-2016 to 09-Aug-2017 [Reset Zoom](#)

- ★ Open Documents directly from the Timeline. Opening a document from the Timeline will not mark it as read in the CDV Tree.



Feb 2017      Mar 2017      Apr 2017

Growth Observation	
Source Date	09-Mar-2017
Category	Growth Observations
Service	Paediatrics
Author	Young, Colin
	<a href="#">Open Document</a>

## ★ Flowsheets

**Please Note:** This section is for informational purposes only. Due to the limitations of View Only access, Flowsheets tab will not display, but laboratory results can be viewed from the CDV Tree in the **Summary** tab.

A flowsheet is a tabulated summary of recent laboratory results (in chronological order, with the most recent first). These results can also be displayed in a graph. Eight flowsheets are available:

- Common Bloods
- Cardiac
- Chemistry
- Diabetes
- Haematology
- Hormone
- Infection
- Renal

Summary Visits Imaging Rad Orders OP Notes MH IP Notes Unsigned Results Timeline Flowsheets 2nd View

Common Bloods Flowsheet  
Cardiac Flowsheet  
Chemistry Flowsheet  
Diabetes Flowsheet  
Haematology Flowsheet  
Hormone Flowsheet  
Infection Flowsheet  
Renal Flowsheet

### Renal Flowsheet

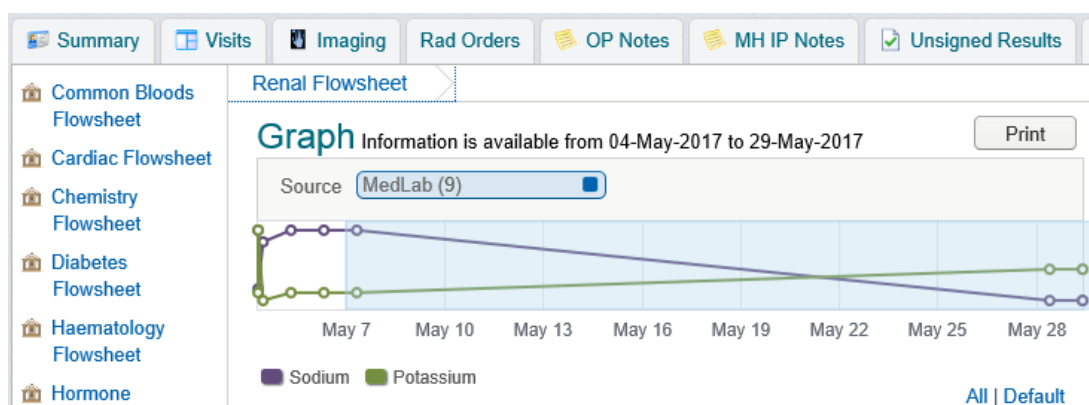
« Show Older | Show Newer » Print

Collected	07-May 2017 07:56	08-May 2017 14:00	28-May 2017 09:19	29-May 2017 09:19	29-May 2017 09:19	Ref. Range (Units)
<input type="checkbox"/>	13 months ago	13 months ago	12 months ago	12 months ago	12 months ago	
<input checked="" type="checkbox"/>	<b>Sodium</b> 144	–	138	138	138	135-145 (mmol/L)
<input checked="" type="checkbox"/>	<b>Potassium</b> * 3.3	–	3.6	3.6	3.6	3.5-5.2 (mmol/L)
<input type="checkbox"/>	<b>Creatinine</b> –	* 122	–	–	–	45-90 (umol/L)
<input type="checkbox"/>	<b>eGFR</b> –	* 48	–	–	–	(>90 mL/min/1.73m2) (mL/min/1.73m2)

Graph 2 tests selected


\* Abnormal \*\* Critically Abnormal § Units or Reference Range differs

- The last 5 results are available by default, but older results can be opened.
- Flowsheets only displays lines with results available. If no results have been received for an item for this patient then the item will not display.
- Select collected items and click Graph if you prefer to view this way.



## ★ 2nd View

You cannot have two instances of Clinical Portal open at one time, unless you are within a patient's record. With patient in context, click the 2<sup>nd</sup> View tab which will open up an additional window. This may be helpful for viewing results whilst typing notes, for example. As soon as you close the patient's record or navigate to a different patient

record using the  buttons, both windows will close. This is a patient safety feature.

## ★ Demographics

The information displayed in the Patient Demographics tab is live fed into Clinical Portal from PAS. This information will continue to be visible and updated in PAS.

<b>WHITE, Simone (Mrs) Female, AAC2369</b>	
Date of Birth	12 April 1978
Age	40 years
Address	123 MAIN ST, PALMERSTON NORTH, 4410
Domicile DHB	MidCentral DHB
Phone	(H) 3265498
	(W) 0212121
Identifiers	AAC2369 (NHI)
Primary Care Provider	Michael Ivan YEE 169 Medical Centre 169 Russell Street, Palmerston North, New Zealand, 4414
Emergency Contact	White, Pauline (MOTHER) (H) 3265498
Aliases	WHITE, Simone (Mrs)

## ★ Access Tab

The Access tab displays a list of users who have accessed the patient's record within the last 30 days. Each users name is only added once each day they access the record:

### Patient Access



This screen displays a list of users who accessed this patient record in the last 30 days. Each user name is only added once each day they access the record. Please note that a full audit history of access to patient records is kept and can be accessed via a request to the Service Delivery team.

Date	User ID	Full Name
11 Jun 2018	cgriffiths@hbdhb.govt.nz	Catherine Griffiths
07 Jun 2018	rgush@hbdhb.govt.nz	Ricky Gush
07 Jun 2018	cgriffiths@hbdhb.govt.nz	Catherine Griffiths

## Electronic Discharge Summaries


**Please Note:** This section is for informational purposes only. All existing discharge summaries will display in the CDV Tree, the table on page 7 will help you identify the stage discharge summaries are at.

Four Discharge Summary templates are available in Clinical Portal. These are:

- Adult Discharge Summary
- Paediatric Discharge Summary
- Deceased Summary
- Emergency Department Summary

A list of all documents already created will display, as well as the template link. To create a new discharge summary go to the Visits tab in the patient record. Under the Visit History section click the document icon under Links in the far right hand column.

Visit History

Visit Type	Status	Admission	Discharge	Admit Reason	Primary Discharge Diagnosis	Specialty	Clinician	Facility	DHB	Links
IP	Admitted	08-Dec-2017		BEE STING		Orthopaedics	Mr Simon DEMPSEY	Whanganui Hospital	Whanganui DHB	

This page will then display:

Encounter Number	WI1491301A0	Specialty	Orthopaedics	
Admission	2017-12-08 07:00:00.0	Discharge		
Clinician	DEMPSEY Simon			
<input type="button" value="Refresh"/>				
Status	Category	Template	Author	DHB
NOT CREATED	Discharge Summary	Adult Discharge Summary		Whanganui DHB

Click NOT CREATED to load the patient's details into the default discharge summary template for this visit type.

- When creating a new document, the discharge summary that opens depends on the visit type and specialty of the visit, e.g. If a patient has an ED visit then the ED Summary will be presented.
- If you want to change the template type, click the name of the currently selected template. This is located under the document title. A warning message will display. Click OK to proceed. The TemplateChooser window displays, providing more details of the consequences of changing templates. If you still wish to use a different template type, click one of the available links to select, or click Close to return to the previous template without saving.

After you have populated the Discharge Summary you can choose to save as a draft or finalise. When a Discharge Summary is finalised it will immediately be sent to the patient's GP and to any other selected external recipients you chose. If you wish to add a CC to the electronic discharge summary document you need to do this before you finalise the document.

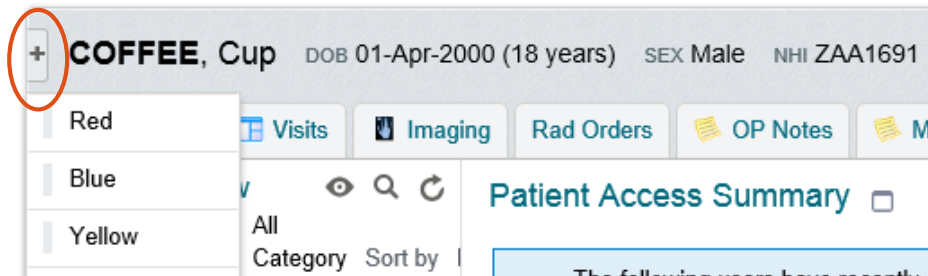
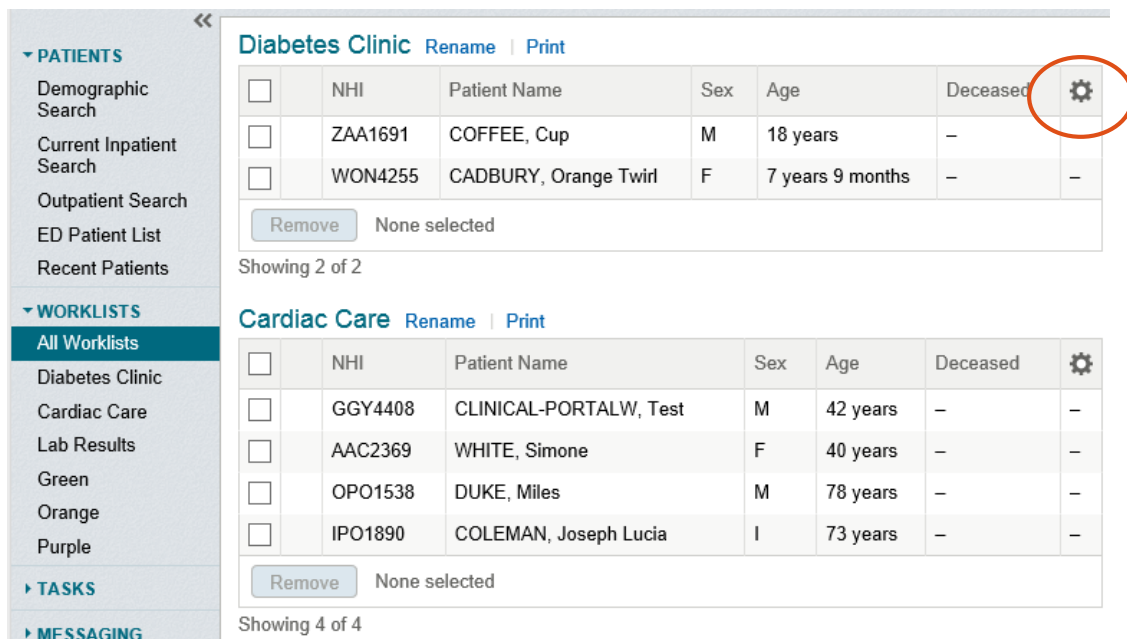
To send a copy of the document to another clinician, that clinician must:

- Be linked with a clinic in WebPAS, and
- Have an associated clinic email address entered in WebPAS.


## Worklists

Worklists make it easier to keep track of groups of patients. Each user has access to six worklists which are named by colours by default and can be renamed as required. Worklists can be created and viewed from the left-hand menu of your home screen or added to your homepage for quick access.

You can add a patient to a worklist when viewing in context:





The screenshot shows the 'Diabetes Clinic' worklist table. The table has columns for NHI, Patient Name, Sex, Age, and Deceased. A settings gear icon is circled in red in the top right corner of the table. Below the table is a 'Remove' button and the text 'None selected'. The table shows two patients:

<input type="checkbox"/>	NHI	Patient Name	Sex	Age	Deceased	
<input type="checkbox"/>	ZAA1691	COFFEE, Cup	M	18 years	-	-
<input type="checkbox"/>	WON4255	CADBURY, Orange Twirl	F	7 years 9 months	-	-

Showing 2 of 2

Below the 'Diabetes Clinic' table is the 'Cardiac Care' worklist table. It has columns for NHI, Patient Name, Sex, Age, and Deceased. A settings gear icon is also present in the top right corner of this table. Below the table is a 'Remove' button and the text 'None selected'. The table shows four patients:

<input type="checkbox"/>	NHI	Patient Name	Sex	Age	Deceased	
<input type="checkbox"/>	GGY4408	CLINICAL-PORTALW, Test	M	42 years	-	-
<input type="checkbox"/>	AAC2369	WHITE, Simone	F	40 years	-	-
<input type="checkbox"/>	OPO1538	DUKE, Miles	M	78 years	-	-
<input type="checkbox"/>	IPO1890	COLEMAN, Joseph Lucia	I	73 years	-	-

Showing 4 of 4

- Change the columns in your worklist table by selecting the settings symbol on the right of each list
- A printed worklist gives you an additional notes column at the far right hand side

## User Settings

User Settings can be assessed from the left-hand menu of your home screen or from any other screen by clicking on your name on the top right-hand corner:



**Inactivity Logout:** Choose how long you want Clinical Portal to remain open before it automatically logs you out due to inactivity. Those using shared computers should consider setting this for a short time. The default is 1 hour.

**Important Messages:** Choose how you want to see alerts for messages from the System Administrators. The options are; until you dismiss it, for a selected amount of time or do not display alert at all.

**Clinician Homepage:** Set filters on information so you only see what you choose to see on your Homepage. Talk to you area Super User about setting this up.

**MedDocs User:** Complete first and last name fields if you are a MedDocs user, otherwise leave blank.

**NZCIS – Designation:** This section must be completed as it enables you to write Inpatient and/or Outpatient notes.

**NZCIS – DHB:** Set to Hawke's Bay DHB

**NZCIS – General:** Select a default view for CDV Tree Grouping on the Patient Summary tab. Choose to view results singularly or cumulatively by default. Add NZMC number (if applicable), otherwise leave blank.

**NZCIS – Portal Forms:** Choose to view All Portal Forms by default, or create a list of forms most relevant to you by clicking Add and selecting relevant forms.

### NZCIS Portal Forms

Show Setting  All Portal Forms  My Portal Forms My Portal Forms

**Results SignOff Count:** Set filters for how you want your Results SignOff to be displayed and which results you wish to see. Be very careful with this setting as it will only show you what you ask for and not necessarily all your results. Selecting My ED Location will show you all outstanding results for ED, which you wouldn't want unless specifically working in ED.

### Results SignOff Count

CDV Grouping  Category  Date  Service  Author

ED Filters

IP Filters

IP Specialty

OP Filters

Information Applying inpatient specialty filters will ONLY filter inpatient results. ED and outpatient results will not be affected.

Unsigned Result Display  Patient Level  Result Level

Ensure to click  after changing any user settings.