Change to the attached documents interface in RiO

ELFT RiO is used by both community and mental health teams. Originally these were two separate databases but were merged several years ago and since then, clinicians have been given access to progress notes made by both services in the record to give a holistic view of patient care. You are likely familiar with this from the progress note interface. On the right-hand side of the progress notes screen is a "Note Types" tickbox list which allows you to filter the notes by the profession of the staff member who entered the note. For example, if I wanted to see just progress notes made by psychologists in both community and mental health, then I would tick these options and press the "Filter Display" button as indicated in the following screenshot:

It should be clear from this example that the "CH" prefix stands for Community Health (NOT City & Hackney) and "MH" for Mental Health.

What may be less familiar is that a similar distinction exists in attached documents that can be uploaded with a "CH" document type for Community Health documents and an "MH" document type for Mental Health documents. Currently there is a mixed economy and not all staff have access to both types. This means, for example, that a document uploaded with a "CH" document type will be invisible to a staff member with access only to "MH" document types. This has led to incidents in teams where a document is uploaded against an incorrect type then is invisible to other staff members who should have access to it.

As a result, we will shortly be opening up all document types to all staff and so it is important that you are aware of how to upload documents going forward. We will now discuss the Document Upload and Document List View screens which are accessible from the Case Record Menu as indicated in the following screenshot:
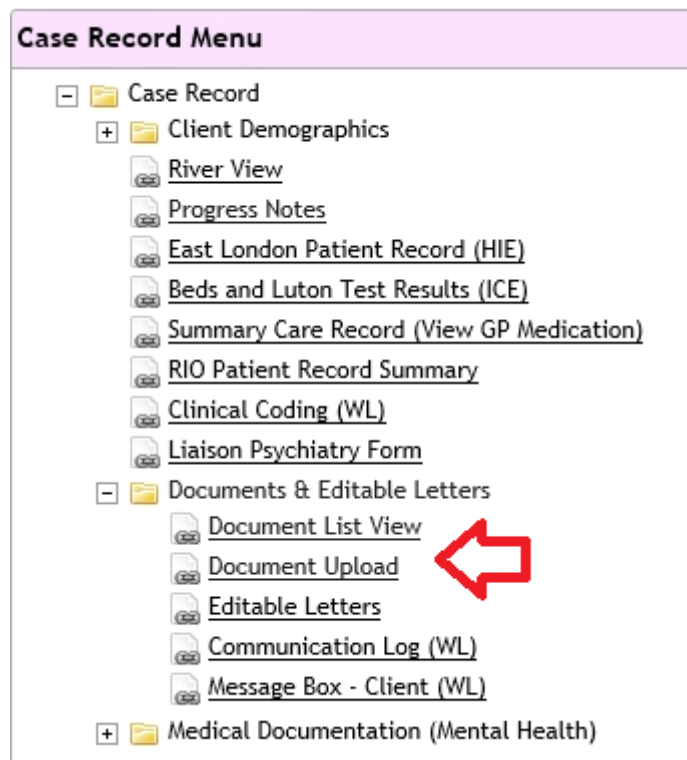
The next screenshot shows the familiar Document Upload screen with an arrow indicating the "Document Type" picklist which is the relevant field for this discussion:

Going forward you should continue to upload documents as you have previously but when selecting an item from the Document Type picklist be aware that both Community Health (CH) types and Mental Health (MH) types are present, as shown in the following screenshot. Please ensure you select the correct type.
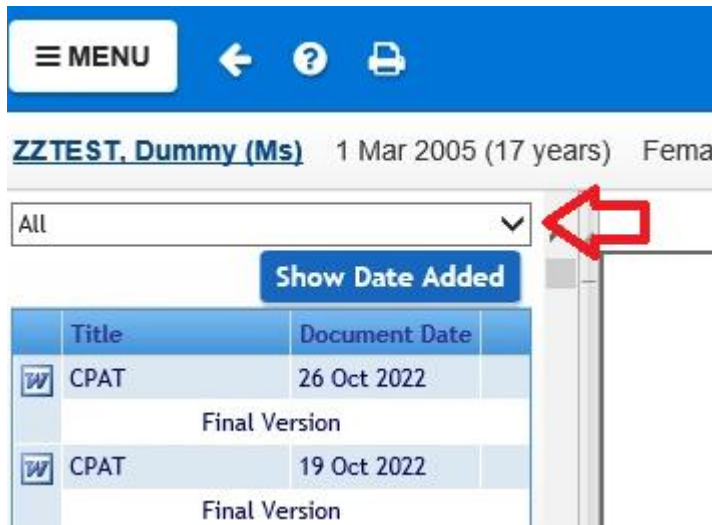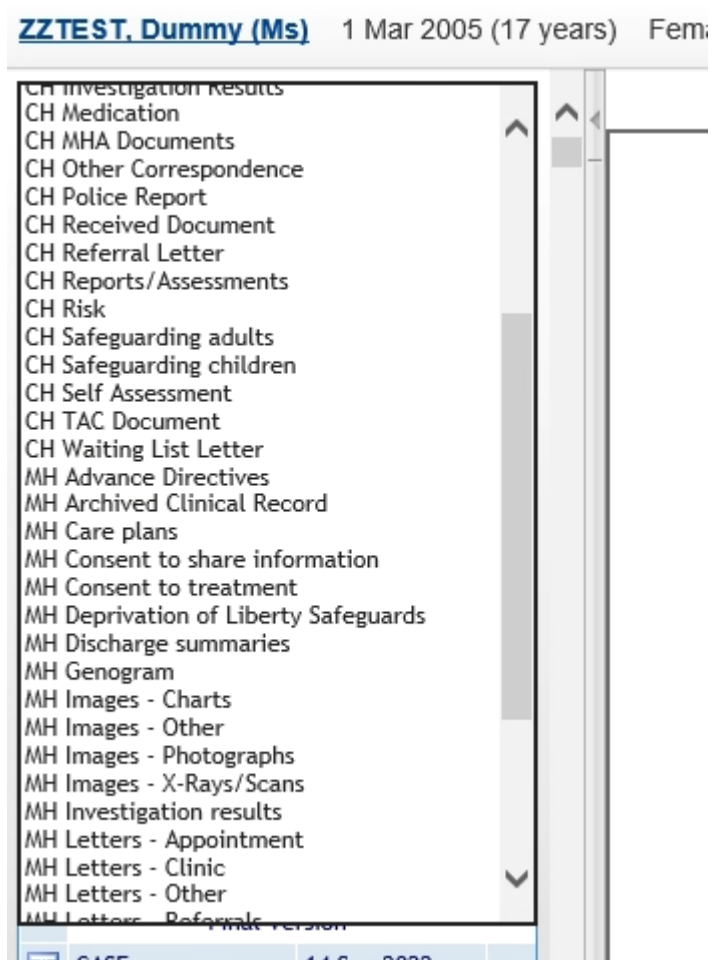
Similarly, in the Document List View screen, the filter picklist will also show both "CH" and "MH" document types going forward. The filter picklist is indicated by an arrow in the following screenshot of the top left of the Document List View screen:

The picklist that appears is shown below:

Selecting one of these document types will allow you to filter the listed documents to display only documents of that type. Again, please ensure to distinguish correctly between Community Health and Mental Health document types.