



healthcare:connected

# Stratus End User CRIB Sheet & System Administration Manual

Training Department

V3.1 14/02/2023

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## Copyright

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**All patient names are fictitious, any resemblance to actual patients, living or dead, is entirely coincidental.**

# Introduction

## Purpose

The purpose of this document is to explain all Stratus End User and System Administration functions.

## Audience

This document is intended to be used by End Users, System Managers and any other stakeholders involved in using or deploying the solution.

## Stratus – End User Interface

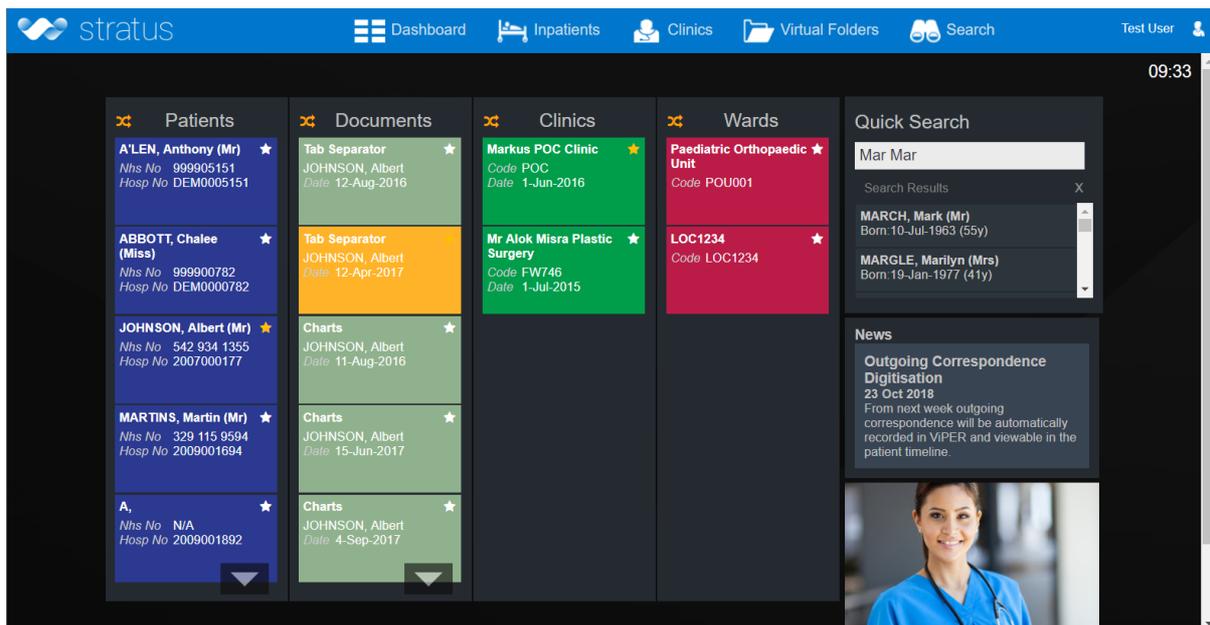
Stratus has two simple design principles: To find the patient quickly, and to find the relevant content without delay.

It can digitise paper records almost immediately, with data captured using open standards and stored or sent to the appropriate system.

With Stratus, clinicians have access to a unified, connected view of patient activity delivered through an intuitive user interface. stratus also supports wide regional sharing projects by enabling a unified view of patient activity across many organisations.

### Dashboard View

- The dashboard provides the user with links to their most recently accessed patients, documents, clinics and wards.
- A quick search box allows the user to identify a patient by name, NHS or Hospital number.



- Tapping or clicking on one of the coloured tiles will open the relevant item.
- The lists can be further filtered by selecting the  favourites icon which will only show the items flagged with the yellow “favourite” star .
- The current user is displayed in the top right hand corner – clicking the username allows the user to log out of the system.

## Patient Access Methods

### Launch Patient in Context

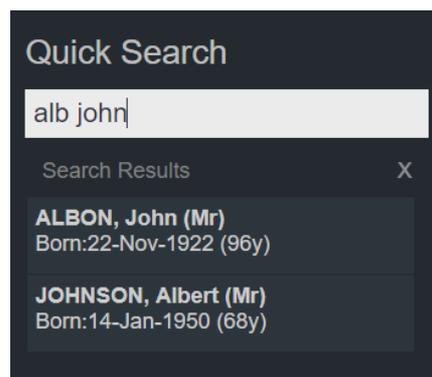
Opening Stratus from a linked PAS or EPR will open the Stratus record for the currently selected patient in the clinical system. Stratus will display the **document category** view for the selected patient.

### Select Recent Patient

The left hand column lists the current user's ten most recently accessed patients – clicking or tapping on the relevant tile will open that record.

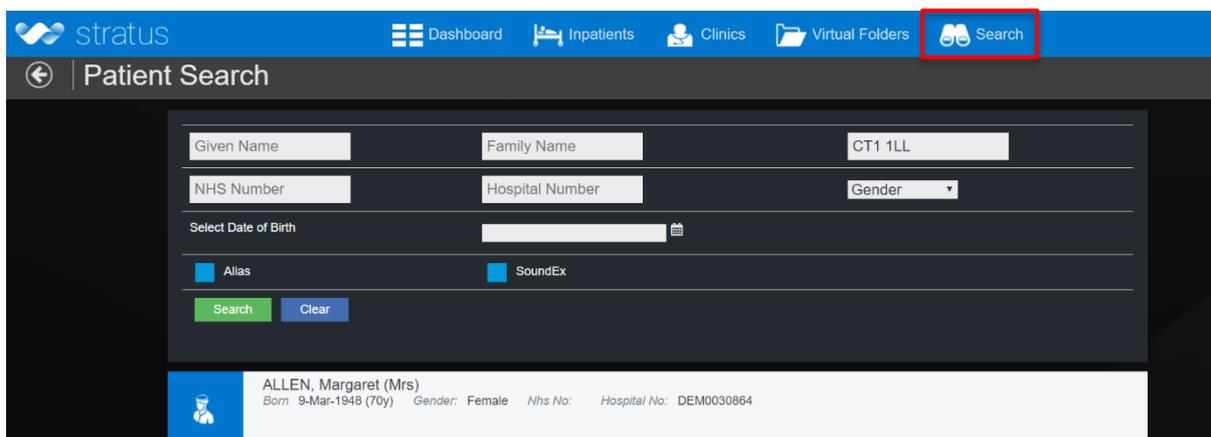
### Quick Search

Typing the patient name (partial or complete), NHS number or hospital number into the **Quick Search** box on the dashboard will display all matching patients – click or tap on the record to be opened.



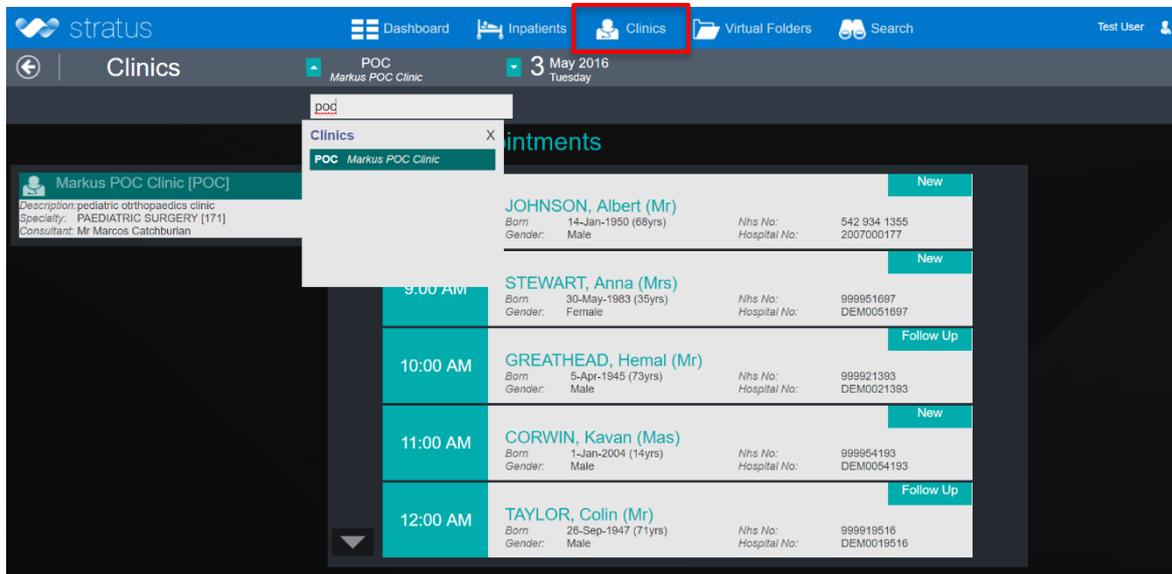
### Advanced Search

Selecting the **Search** button in the blue navigation bar provides extended search options including postcode, gender and date of birth. Enter the required value and click on the green **Search** button to find all matching records then click on the patient details to open that record.



## Clinic Access

Select the **Clinics** button on the blue navigation bar to search for a clinic list. Selecting the appropriate clinic code and date will show a list of patients – click the required record to open.

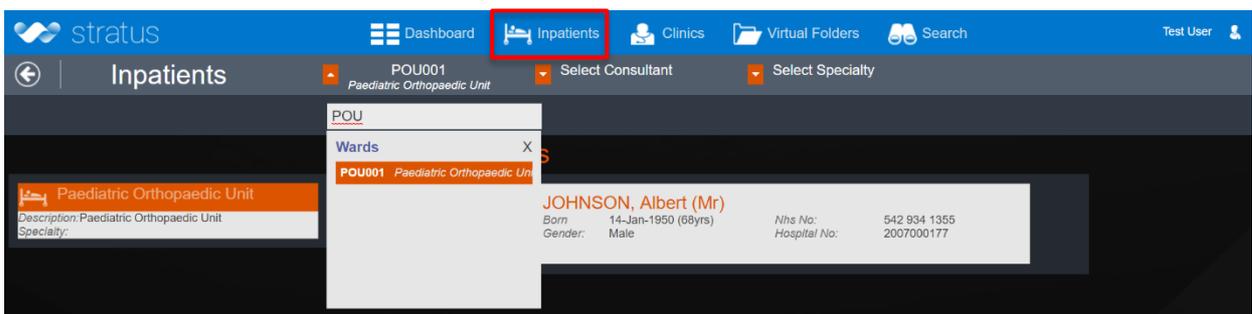


It should be noted that recently accessed clinics will appear on the **dashboard** view and can be opened from there.

## Inpatient (Ward) Access

Click on the **Inpatients** button on the blue navigation bar to enter a ward code. This will display a list of patients recorded as resident in that location – the list can be further filtered by selecting a consultant and/or speciality.

Click the required record to open. It should be noted that recently accessed wards will appear on the **dashboard** view and can be opened from there.



Once a patient is selected a patient banner is shown at the top of the screen detailing their name, title, date of birth, recorded gender, NHS and Hospital numbers. Further data from the PAS/EPR can be shown by clicking the chevrons to the right of this information.



This displays an expanded view detailing address, personal and GP contact details along with known allergies.

Clicking the chevron again hides / collapses the expanded information.

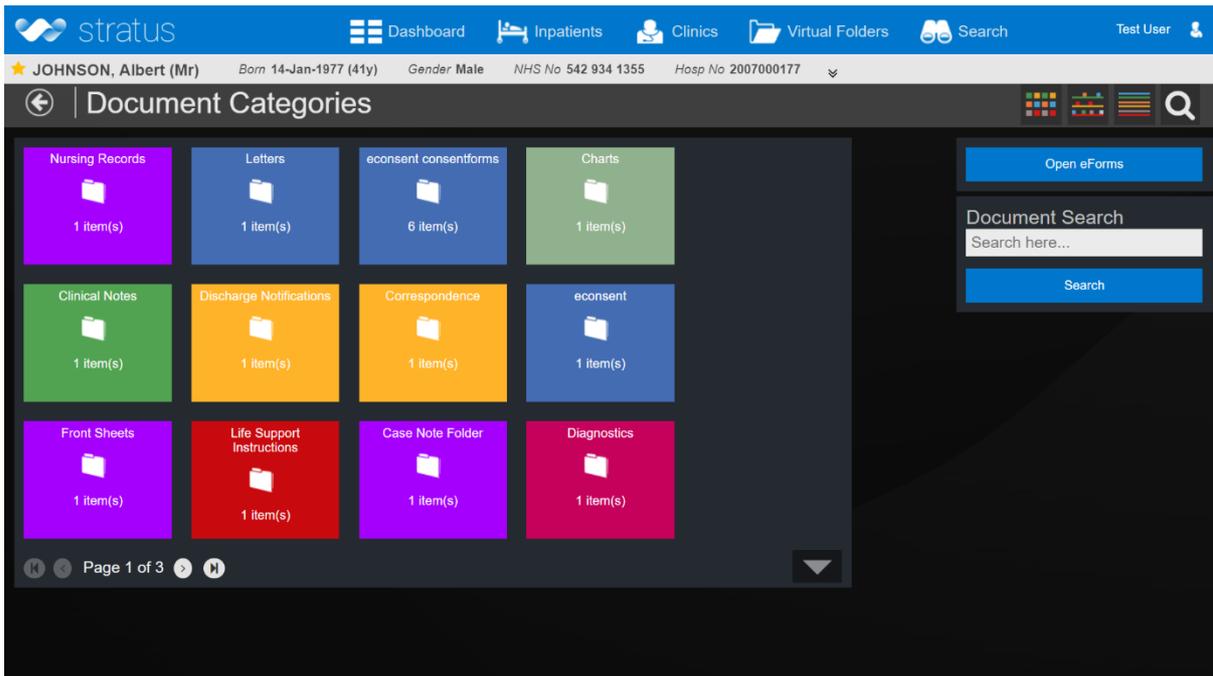
★ **JOHNSON, Albert (Mr)** Born 14-Jan-1950 (68y) Gender Male NHS No 542 934 1355 Hosp No 2007000177 

**Patient Detail** **Known Allergies**

 <b>Address</b>	 <b>Contact</b>	 <b>GP</b>
Address Line1 20 HALLAM WAY Address Line2 CHISLEHURST Address Line3 KENT Address Line4 UNITED KINGDOM Postcode DE56 0RJ	Mobile 333 Home Phone 01689 877452 Work Phone 02084607756	GP Id G8504007 GP Name N/A GP Phone N/A GP Practice Code H81101

## Patient Document Views

Selecting a patient tile from the dashboard view (or launching Stratus in patient context from an integrated EPR) will display the **document category** view. This is a collection of colour coded tiles indicating how many documents in each document category the patient has.



stratus Dashboard Inpatients Clinics Virtual Folders Search Test User

★ **JOHNSON, Albert (Mr)** Born 14-Jan-1977 (41y) Gender Male NHS No 542 934 1355 Hosp No 2007000177

**Document Categories**

<b>Nursing Records</b> 1 item(s)	<b>Letters</b> 1 item(s)	<b>econsent consentforms</b> 6 item(s)	<b>Charts</b> 1 item(s)
<b>Clinical Notes</b> 1 item(s)	<b>Discharge Notifications</b> 1 item(s)	<b>Correspondence</b> 1 item(s)	<b>econsent</b> 1 item(s)
<b>Front Sheets</b> 1 item(s)	<b>Life Support Instructions</b> 1 item(s)	<b>Case Note Folder</b> 1 item(s)	<b>Diagnostics</b> 1 item(s)

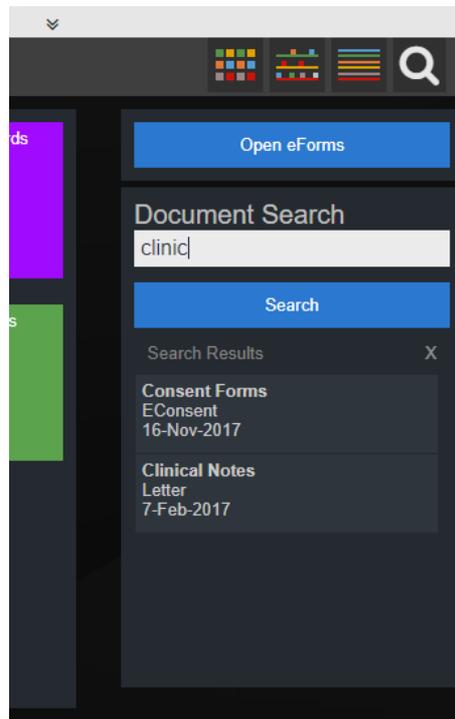
Open eForms

Document Search  
Search here...  
Search

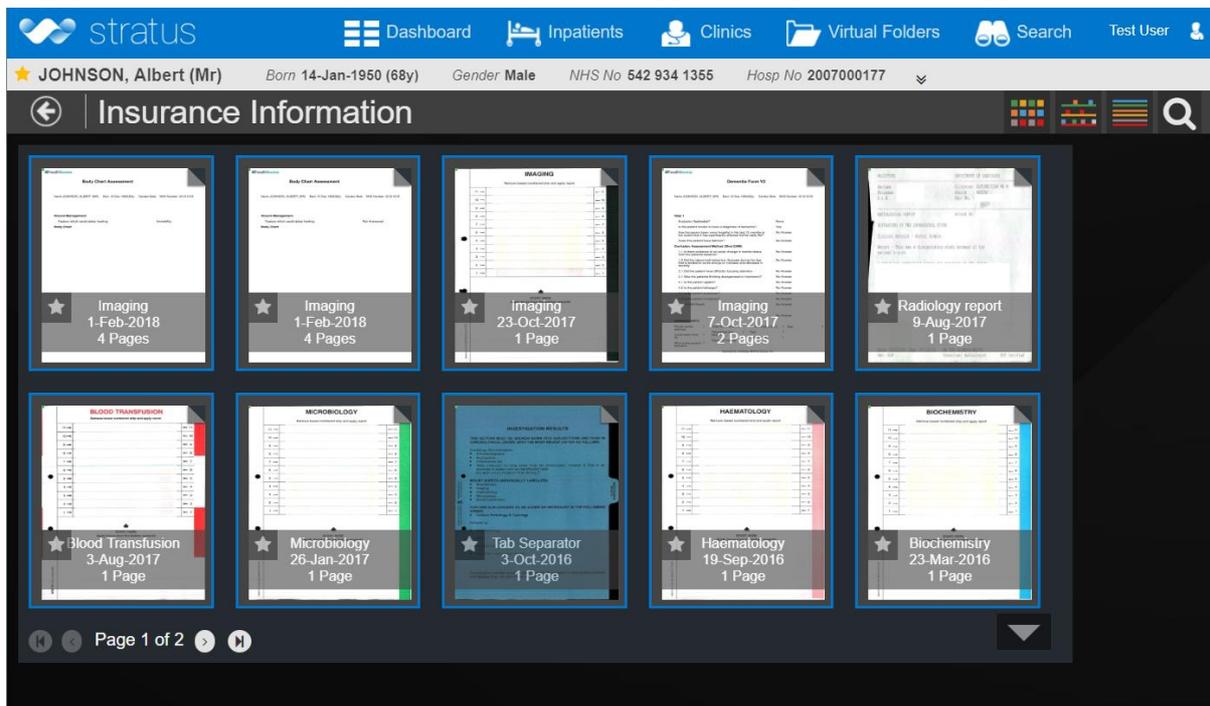
Page 1 of 3

Tapping or clicking on a tile will display thumbnail images of the available documents, displaying the document type, date, page count and favourite status. Clicking one of these thumbnails will open the selected document (see [Full Document View](#)).

Typing a keyword into the **Document Search** box and clicking the **Search** button will return a list of all documents that contain that term.



The search is based on the digitally OCR (Optical Character Recognition) version of the documents obtained during back end processing which can limit results in the event of a poor quality image. Stratus will not show any externally sourced documents (such as DICOM images). When a required document has been identified it can be opened by clicking on details in the result list.

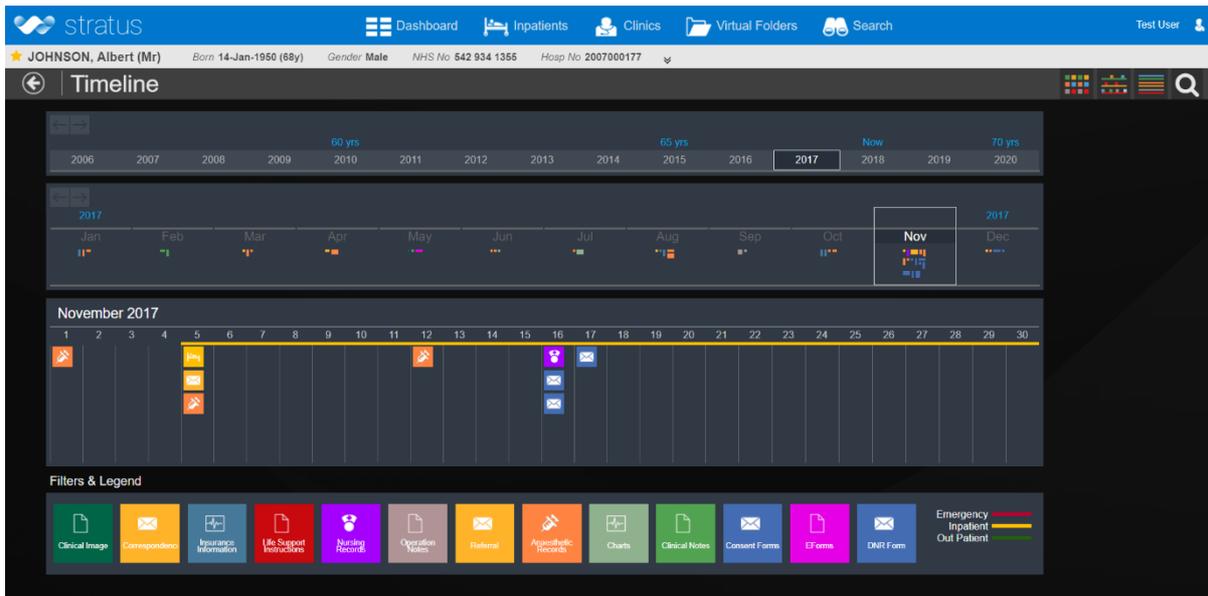




The document category view is accessed again by clicking on the icon  in the top right hand corner of the screen.

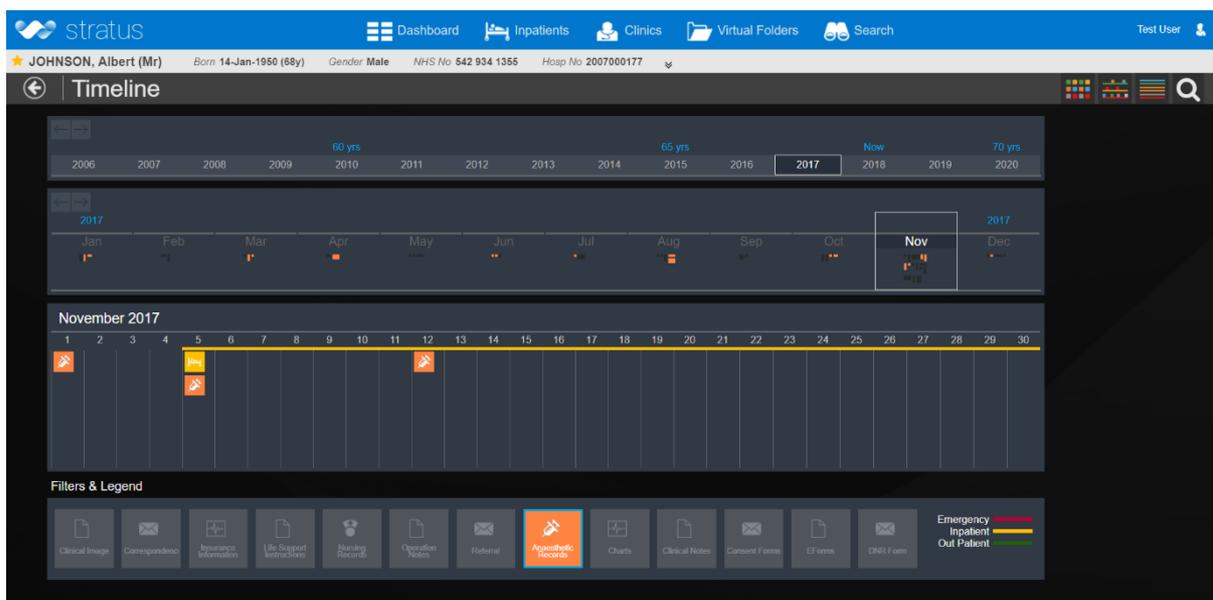


Selecting the  icon will switch to the **timeline view**, which shows the patient's documents in relation to a chronological timeline overlaid with encounter information (taken from the PAS/EPR).

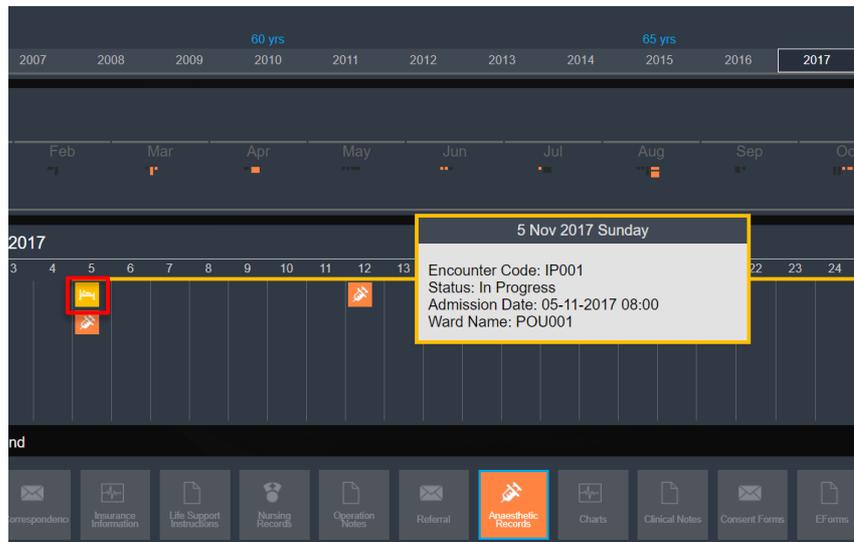


For the selected year a colour coded pixel index of stored documents for each month is shown - these coloured pixels correspond to the document categories listed at the bottom of the screen.

The document category tiles can be clicked to show only that type of document – i.e. Clicking on the orange 'Anaesthetic Records' tab category in the above example has the following effect:

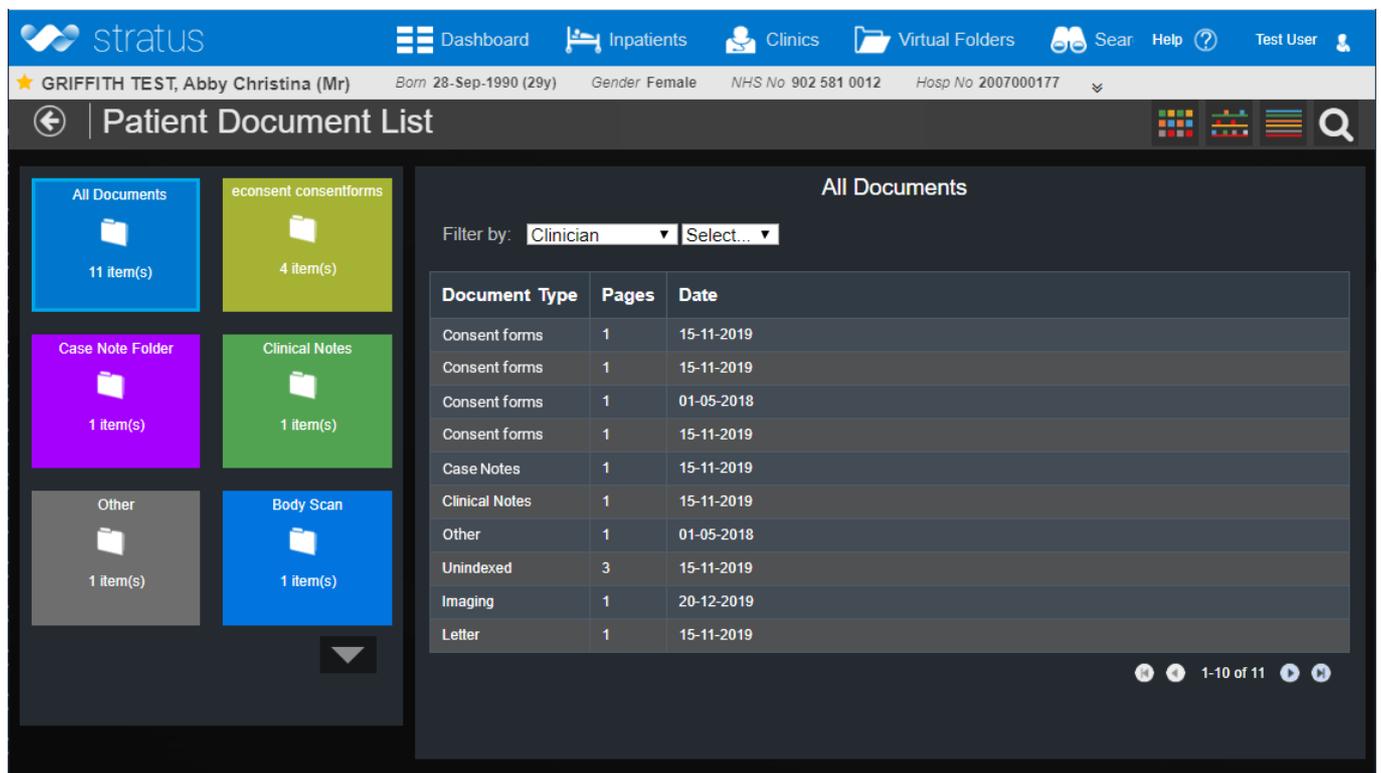


Clicking on an encounter icon will show the details provided by the PAS/EPR feed.



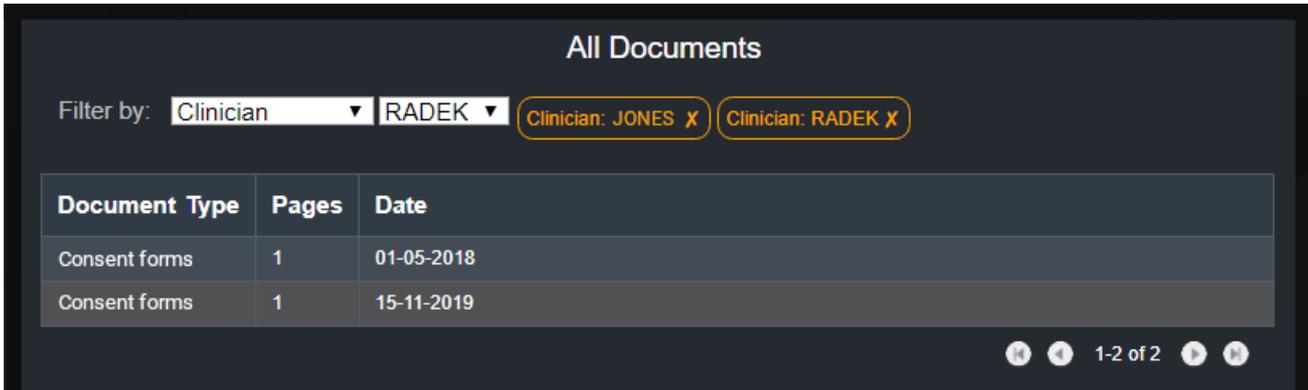
Clicking on a document icon will display a thumbnail view of the document – clicking this in turn will open the document in full screen **document view**.

The **Patient document list** view is selected with the  icon and displays a split view with selectable document category tiles on the left hand side of the screen and a tabulated summary list of documents for the selected document category shown on the right.



The system shows a default document category of 'All Documents'. Upon selecting a specific category, the tabulated list is filtered to only show matching documents. The table rows can be sorted by column (alphabetically or chronologically for date entries) by clicking on the column heading.

The **filter fields** provide options to filter on any displayed data field. Select the field type from the first drop down list and the required value from the second. Note that it is possible to filter on multiple values of the same field as follows:



The screenshot shows the 'All Documents' interface. At the top, there are filter fields: 'Filter by: Clinician' with a dropdown arrow, and 'RADEK' with a dropdown arrow. Below these are two filter buttons: 'Clinician: JONES X' and 'Clinician: RADEK X'. Below the filters is a table with the following data:

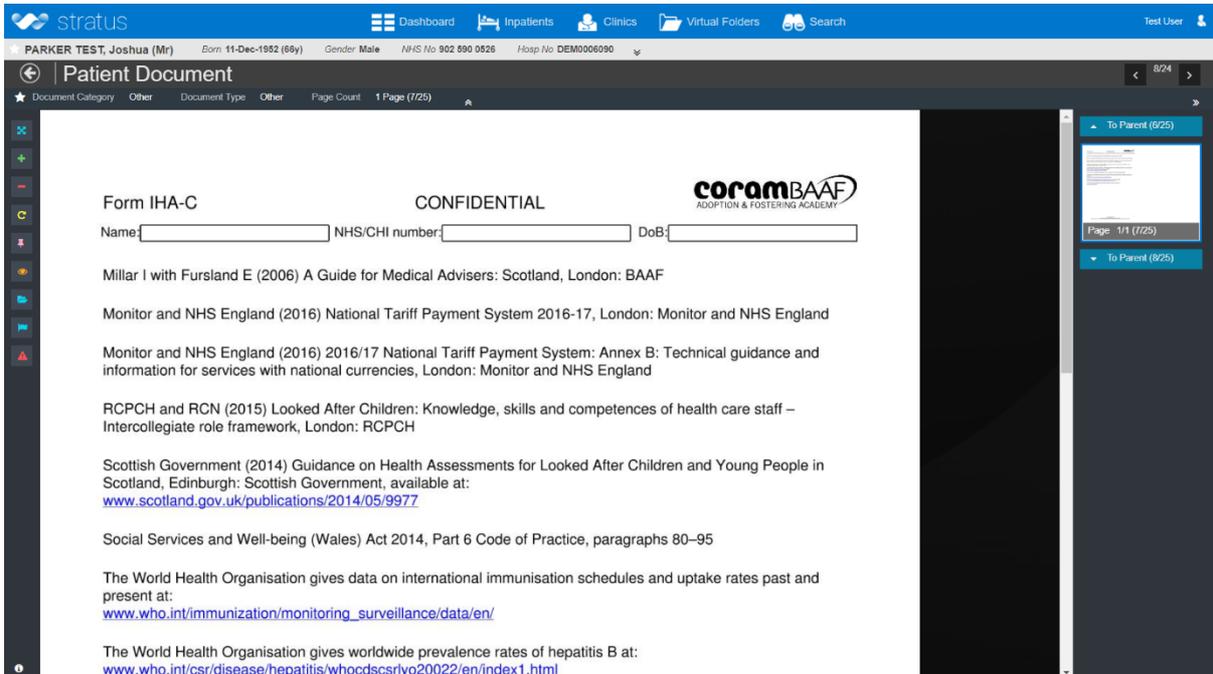
Document Type	Pages	Date
Consent forms	1	01-05-2018
Consent forms	1	15-11-2019

At the bottom right of the table, there are navigation icons and the text '1-2 of 2'.

Once a filter is no longer required click on the X next to the filter to remove it.

## Full Document View

Selecting a document from the dashboard or document category views will open the selected document in the full screen viewer.



The screenshot shows the full document view interface. At the top, there is a navigation bar with the 'stratus' logo and various menu items: 'Dashboard', 'Inpatients', 'Clinics', 'Virtual Folders', and 'Search'. Below the navigation bar, there is a patient information header for 'PARKER TEST, Joshua (Mr)' with details like 'Born: 11-Dec-1992 (66y)', 'Gender: Male', 'NHS No: 902 590 0626', and 'Hosp No: DEM0006090'. Below the header, there is a 'Patient Document' section with a breadcrumb trail: 'Document Category: Other > Document Type: Other > Page Count: 1 Page (7/25)'. The main content area displays a document titled 'Form IHA-C' with a 'CONFIDENTIAL' warning and the 'coramBAAF' logo. The document text includes references to 'Millar I with Fursland E (2006) A Guide for Medical Advisers: Scotland, London: BAAF', 'Monitor and NHS England (2016) National Tariff Payment System 2016-17, London: Monitor and NHS England', 'Monitor and NHS England (2016) 2016/17 National Tariff Payment System: Annex B: Technical guidance and information for services with national currencies, London: Monitor and NHS England', 'RCPCH and RCN (2015) Looked After Children: Knowledge, skills and competences of health care staff – Intercollegiate role framework, London: RCPCH', 'Scottish Government (2014) Guidance on Health Assessments for Looked After Children and Young People in Scotland, Edinburgh: Scottish Government, available at: [www.scotland.gov.uk/publications/2014/05/9977](http://www.scotland.gov.uk/publications/2014/05/9977)', 'Social Services and Well-being (Wales) Act 2014, Part 6 Code of Practice, paragraphs 80–95', 'The World Health Organisation gives data on international immunisation schedules and uptake rates past and present at: [www.who.int/immunization/monitoring\\_surveillance/data/en/](http://www.who.int/immunization/monitoring_surveillance/data/en/)', and 'The World Health Organisation gives worldwide prevalence rates of hepatitis B at: [www.who.int/csr/disease/hepatitis/whocdscsrlyo20022/en/index1.html](http://www.who.int/csr/disease/hepatitis/whocdscsrlyo20022/en/index1.html)'. On the right side, there is a sidebar with navigation controls, including 'To Parent (9/25)' and 'Page: 1/1 (7/25)'.

The document's position within the tab category is shown below the username in the top right hand corner – in the screenshot above this is the fifth of sixth documents for example. The user can navigate to the next or previous document in the category by clicking the arrow to the left or right of this value. The document can be navigated by

clicking and holding the mouse button (or pressing and swiping on a touchscreen device) or using the mouse wheel to move up and down. When reach the bottom or top of a page the next page in sequence will be displayed. The currently selected page is highlighted on the right hand side of the screen.

There are a number of document controls to the left of the main document view:

  **Set Favourite / Deselect** – Clicking the star to the left of the document info will set the document as a favourite which can be filtered on the dashboard and is indicated on the thumbnail and patient document list views.

 **Full Screen** – this hides the navigation bars (but retains the patient banner) to provide more screen real estate for viewing the document.

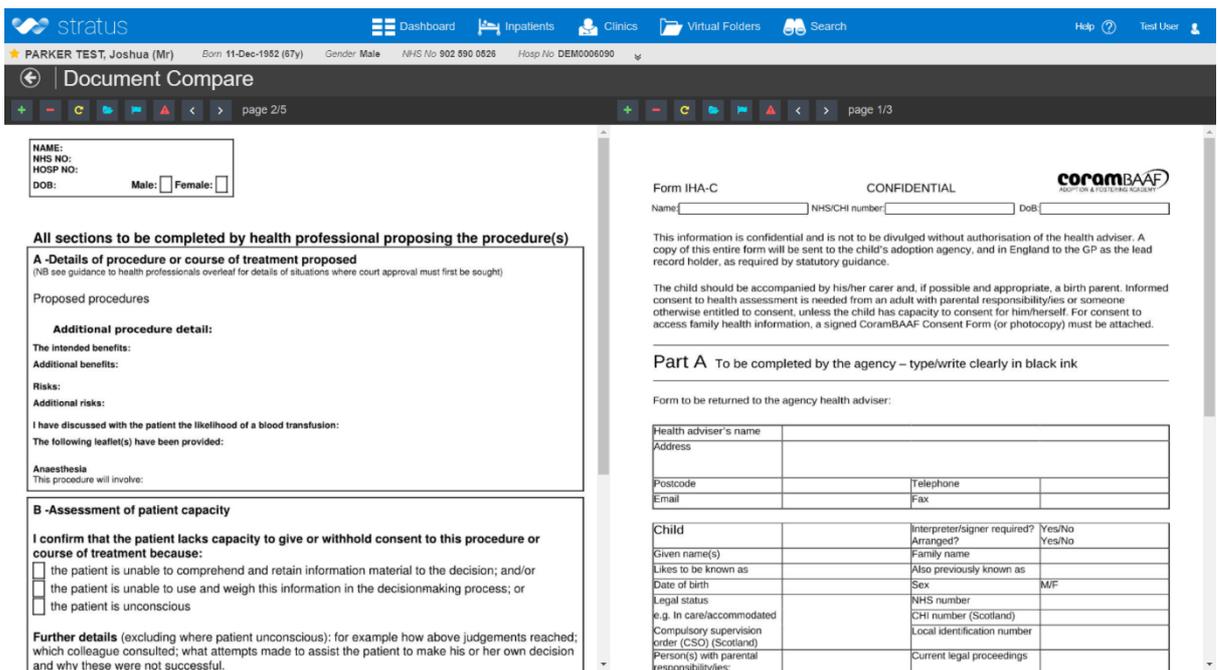
  **Zoom In / Zoom Out** – these controls change document zoom level.

 **Rotate** – click to rotate the document 90° - subsequent clicks will continue to rotate the document in 90° increments.

 **Pin to Compare** – this button allows the side by side comparison of two patient documents.

1. Click the **Pin to Compare** button on the first document.
2. Click the **Back**  arrow to return to the **document category view** and open a second document in **full document view**.
3. Click the **Pin to Compare** button on the second document

These steps will present the two selected documents in a side-by-side view. Controls above each image allow the user to zoom, rotate and navigate multiple pages.



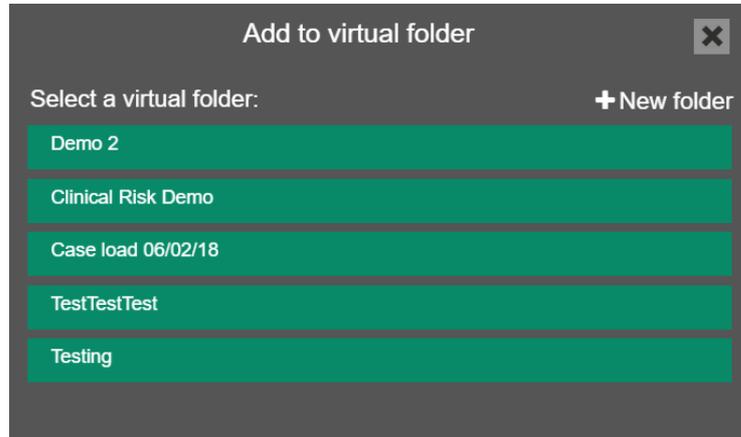
The screenshot shows the 'Document Compare' view in the Stratus software. The top navigation bar includes 'stratus', 'Dashboard', 'Inpatients', 'Clinics', 'Virtual Folders', 'Search', 'Help', and 'Test User'. The patient banner for 'PARKER TEST, Joshua (Mr)' is visible. Below the banner, there are zoom and navigation controls for both documents. The left document is a patient information form with fields for Name, NHS No, HOSP No, and DOB. The right document is a 'Form IHA-C' for adoption and fostering, marked as 'CONFIDENTIAL'. It includes sections for 'Part A' (to be completed by the agency) and 'Part B' (assessment of patient capacity).



**Show / Hide Blanks** – By default Stratus suppresses blank pages; selecting this option toggles between showing and hiding blank pages for the selected document.



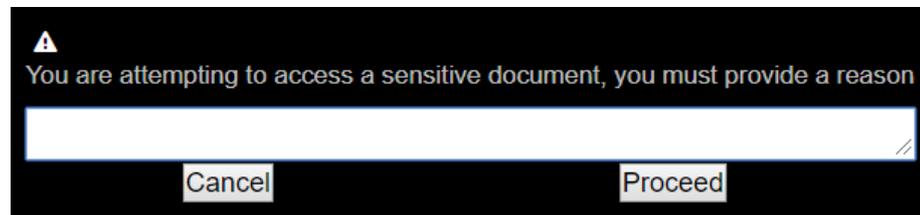
**Add to Virtual Folder** – This option allows the user to add the document to an existing virtual folder or to create a new one by clicking on the **+ New folder** option.



The screenshot shows a dialog box titled "Add to virtual folder" with a close button (X) in the top right corner. Below the title, it says "Select a virtual folder:" followed by a list of folders: "Demo 2", "Clinical Risk Demo", "Case load 06/02/18", "TestTestTest", and "Testing". To the right of the list is a "+ New folder" button.



**Mark as Sensitive** – Clicking this will mark the document as sensitive. Subsequent document access will require the accessing user to provide a reason for access which can be reviewed in the admin event viewer:



The screenshot shows a dialog box with a warning icon (triangle with exclamation mark) and the text: "You are attempting to access a sensitive document, you must provide a reason". Below the text is a text input field. At the bottom are two buttons: "Cancel" and "Proceed".

Selecting this option, a second time will remove the seal – this action will also be audited on the event viewer.



**Notify an Admin Function** – By selecting this option the user can send select a notification and add a free text note to the admin action list.



The screenshot shows a dialog box with a warning icon (triangle with exclamation mark) and the text: "This will flag this document for investigation by an admin, are you sure?". Below the text is a dropdown menu showing "MISFILED" and a text input field containing "Document misfiled - should be Joshua Jones MRID DEM0003339". At the bottom are two buttons: "Cancel" and "Proceed".



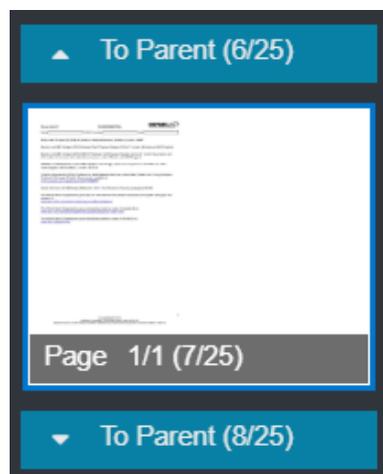
**Document Info** – Clicking on the small **i** icon in the bottom left of the document view will display technical information about the selected document for support and admin purposes.



**Parent/Child Document link** - If a document page thumbnail view displays links [To Parent] buttons this indicates that it is a **child document** that has been automatically identified, categorised and extracted by the back end templating process.

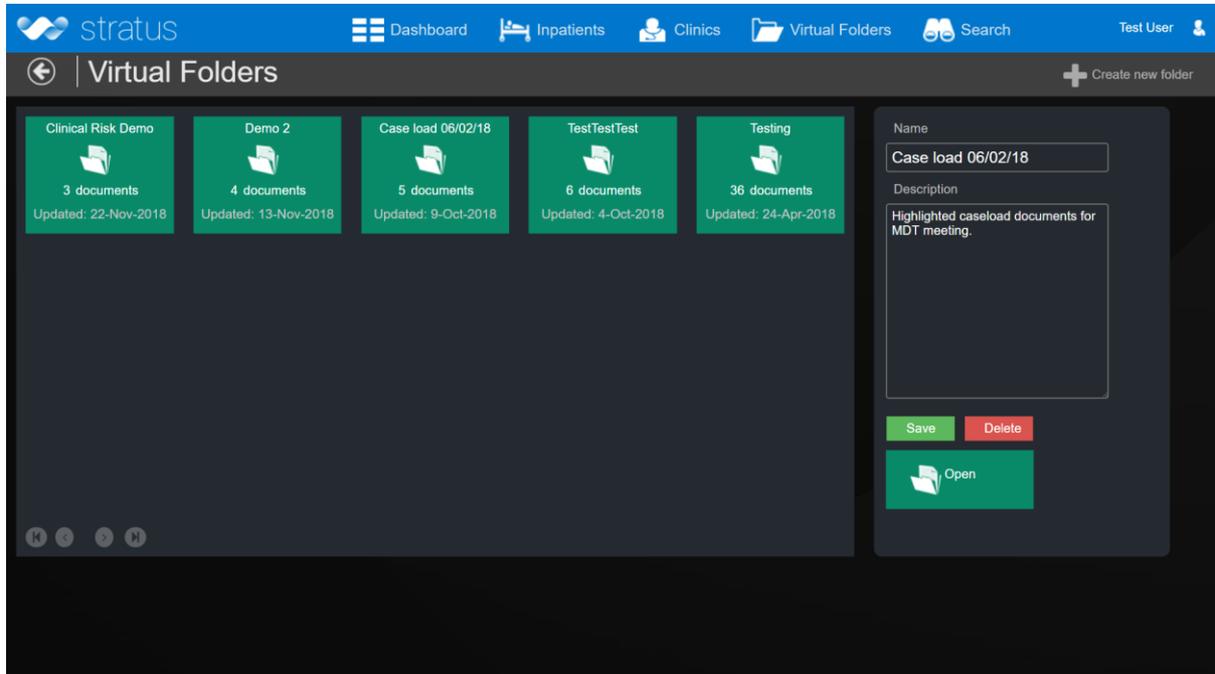
The **child document** is displayed independently of the **parent document**, but it is possible to navigate to the full document via the use of the [To Parent] links which are displayed above and below the thumbnail.

In the following example a single page child document i.e. (1/1) has been extracted from a twenty five page parent document. In the parent document, the single page is page seven of twenty five i.e. (7/25). To see the single page in context to the overall document, the user can click either of the [To Parent] links to navigate to the previous or following page in the document series.

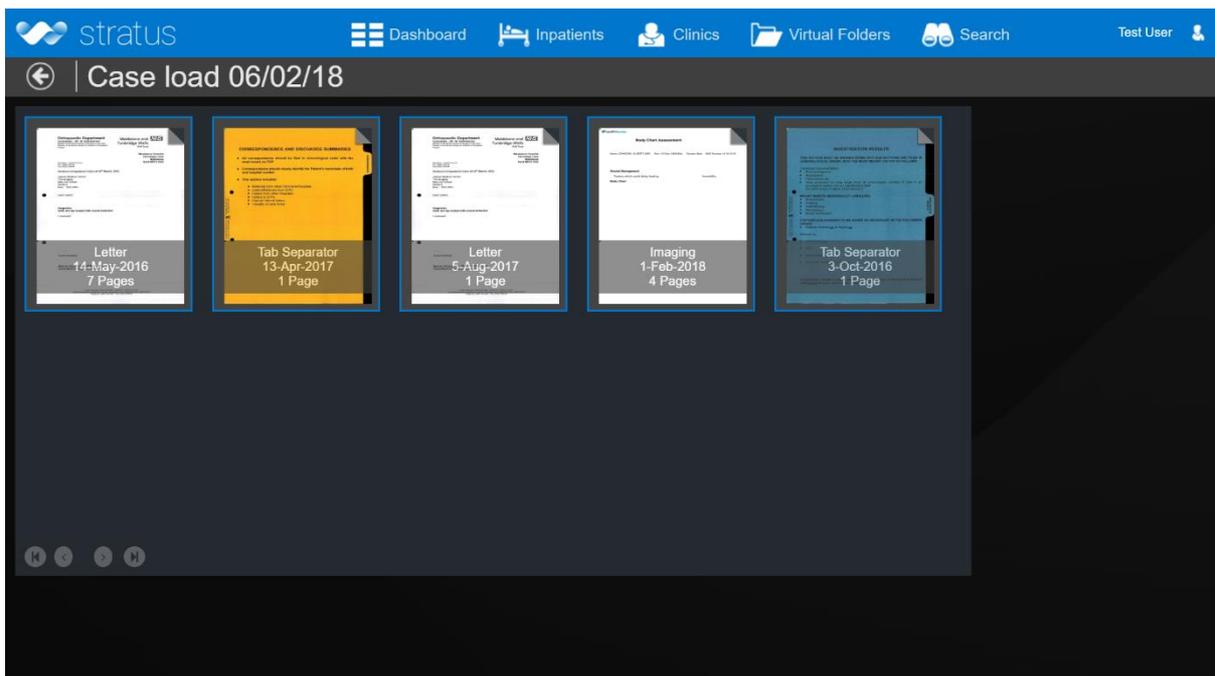


## Virtual Folders

Selecting the **Virtual Folders** button on the blue navigation bar will display the **Virtual Folders** screen showing user-defined folders which contain documents linked via the **Add to Virtual Folder** control on the document view.



Selecting a virtual folder by clicking or tapping on the appropriate tile will present the user with options to edit the name and description and/or open the folder.



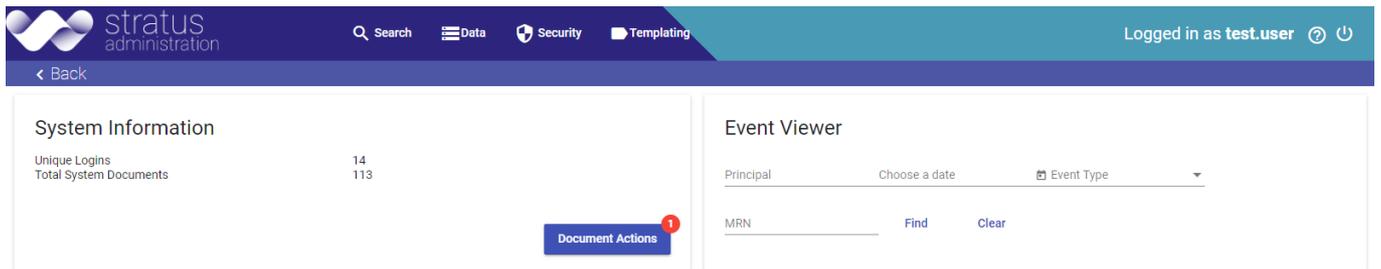
Once the folder is open the user can select the desired document to view as normal.

# Stratus – System Administration Interface

## Dashboard View

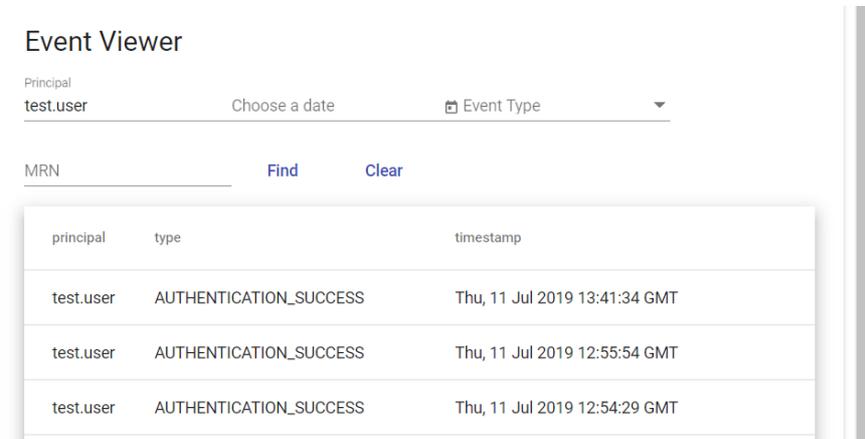
The administration dashboard displays general System Information including:

- Unique Logins
- Total System Documents
- Document Actions Button - link to the outstanding actions list and an event viewer for auditing user actions.



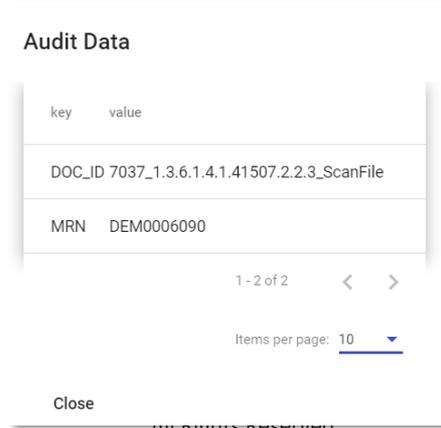
## Event Viewer

System actions can be viewed by **Principal (user)**, **Date**, **Type** and / or **MRN** (Medical Record Number). Enter the required value(s) and click **find** to list the results.



principal	type	timestamp
test.user	AUTHENTICATION_SUCCESS	Thu, 11 Jul 2019 13:41:34 GMT
test.user	AUTHENTICATION_SUCCESS	Thu, 11 Jul 2019 12:55:54 GMT
test.user	AUTHENTICATION_SUCCESS	Thu, 11 Jul 2019 12:54:29 GMT

A further click on a listed audit item will show additional details.



key	value
DOC_ID	7037_1.3.6.1.4.1.41507.2.2.3_ScanFile
MRN	DEM0006090

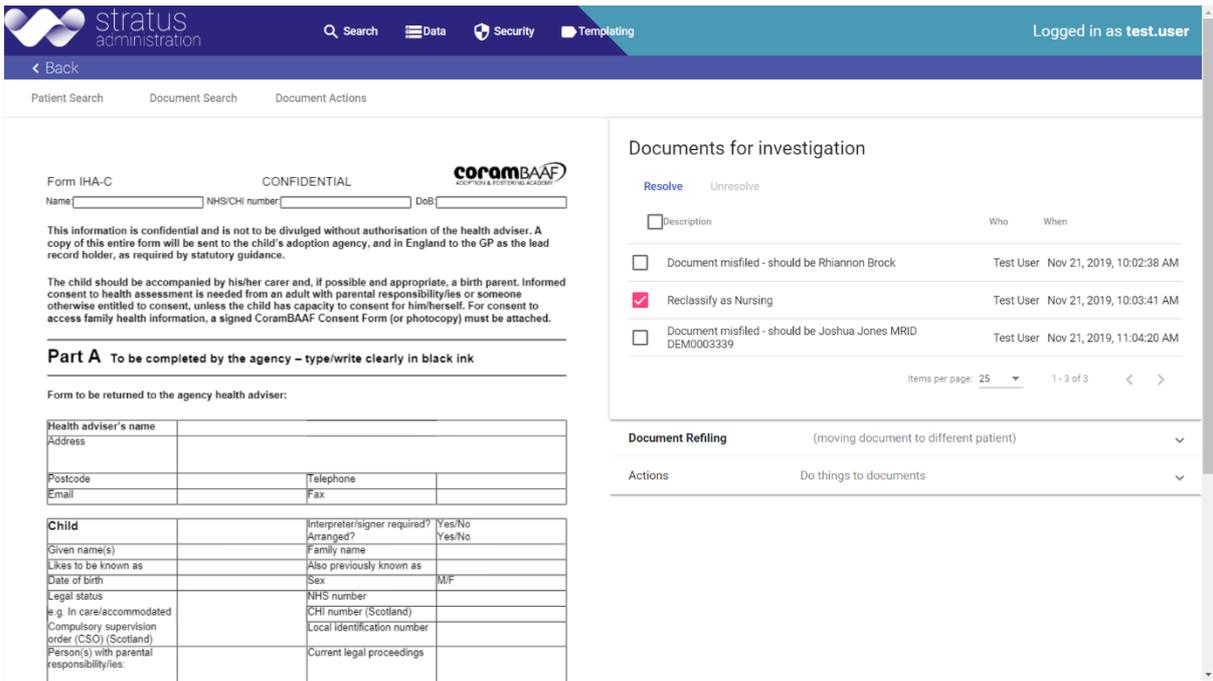
Event ID	Description	Additional Audit Data
BPPC_PUBLISH	Basic Patient Privacy Consent certificate generated for XDS access	MRN
XDS_PUBLISH	Document published to VNA via XDS	MRN, Document ID
BREAK_GLASS	Open a document marked as sensitive	MRN, Document ID, Reason
AUTHENTICATION_SUCCESS	Successful user login	User ID, Permission set
PATIENT_ACCESS	Access patient record	MRN
PATIENT_SEARCH	Search for a patient record	Search criteria
DOCUMENT_DELETE	Admin document deletion	MRN, Document ID
DOCUMENT_ACCESS	Document access	MRN, Document ID
DOCUMENT_MOVE	Admin document refileing	Original MRN, Document ID, New patient ID
DOCUMENT_EXPORT	Admin export document as PDF	MRN, Document ID
STAMP_DELETE	Admin delete stamp definition	Stamp ID
STAMP_CREATE	Admin create text stamp	Stamp ID
STAMP_UPDATE	Admin edit stamp text	Stamp ID

## Document Actions

Documents that have been flagged for action via the **Notify an Admin Function** are listed on the dashboard.

### Document Actions 2

Clicking this link or selecting **[Document Actions]** from the **Search** menu will display the action list. Selecting a document by clicking the checkbox next to the action required, will display a preview and list of possible actions.



**Form IHA-C** CONFIDENTIAL 

Name: \_\_\_\_\_ NHS/CHI number: \_\_\_\_\_ DoB: \_\_\_\_\_

This information is confidential and is not to be divulged without authorisation of the health adviser. A copy of this entire form will be sent to the child's adoption agency, and in England to the GP as the lead record holder, as required by statutory guidance.

The child should be accompanied by his/her carer and, if possible and appropriate, a birth parent. Informed consent to health assessment is needed from an adult with parental responsibility/ies or someone otherwise entitled to consent, unless the child has capacity to consent for him/herself. For consent to access family health information, a signed CoramBAAF Consent Form (or photocopy) must be attached.

**Part A To be completed by the agency – type/write clearly in black ink**

Form to be returned to the agency health adviser:

Health adviser's name	
Address	
Postcode	Telephone
Email	Fax

Child	Interpreter/signer required? Arranged?	Yes/No
Given name(s)	Family name	Yes/No
Likes to be known as	Also previously known as	
Date of birth	Sex	M/F
Legal status	NHS number	
e.g. In care/accommodated	CHI number (Scotland)	
Compulsory supervision order (CSO) (Scotland)	Local identification number	
Person(s) with parental responsibility/ies.	Current legal proceedings	

**Documents for investigation**

Resolve Unresolve

Description	Who	When
<input type="checkbox"/> Document misfiled - should be Rhiannon Brock	Test User	Nov 21, 2019, 10:02:38 AM
<input checked="" type="checkbox"/> Reclassify as Nursing	Test User	Nov 21, 2019, 10:03:41 AM
<input type="checkbox"/> Document misfiled - should be Joshua Jones MRID DEM0003339	Test User	Nov 21, 2019, 11:04:20 AM

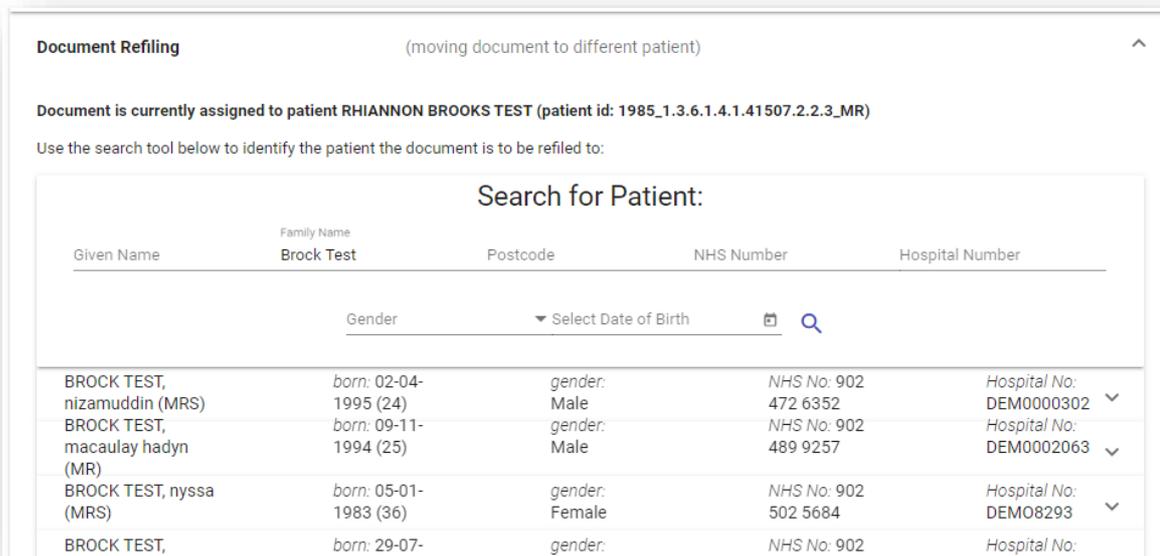
Items per page: 25 1 - 3 of 3

**Document Refiling** (moving document to different patient)

**Actions** Do things to documents

## Document Refiling

Clicking on **Document Refiling** displays a patient search box to locate the destination patient where the document should be refiled. To do this enter the search criteria and click the magnifying glass icon to display patient matches.



**Document Refiling** (moving document to different patient)

Document is currently assigned to patient **RHIANNON BROOKS TEST** (patient id: 1985\_1.3.6.1.4.1.41507.2.2.3\_MR)

Use the search tool below to identify the patient the document is to be refiled to:

**Search for Patient:**

Given Name	Family Name	Postcode	NHS Number	Hospital Number
	<b>Brock Test</b>			
	Gender	▼ Select Date of Birth		
BROCK TEST, nizamuddin (MRS)	born: 02-04-1995 (24)	gender: Male	NHS No: 472 6352	Hospital No: DEM0000302
BROCK TEST, macaulay hadyn (MR)	born: 09-11-1994 (25)	gender: Male	NHS No: 489 9257	Hospital No: DEM0002063
BROCK TEST, nyssa (MRS)	born: 05-01-1983 (36)	gender: Female	NHS No: 502 5684	Hospital No: DEM08293
BROCK TEST,	born: 29-07-	gender:	NHS No: 902	Hospital No:

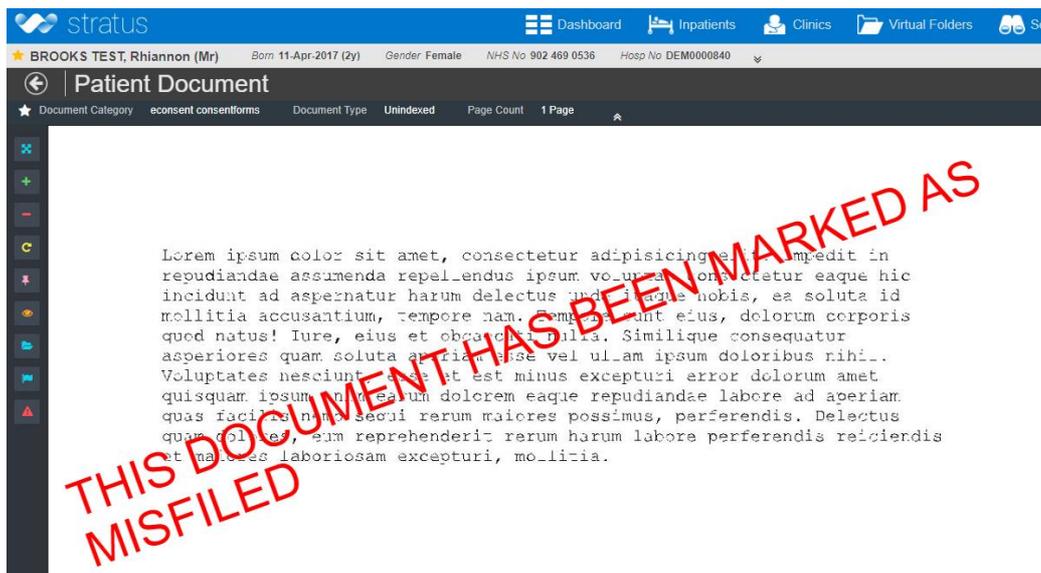
Select the required record and click **Refile to this patient**. A confirmation screen will be displayed.

**Document Refiling**

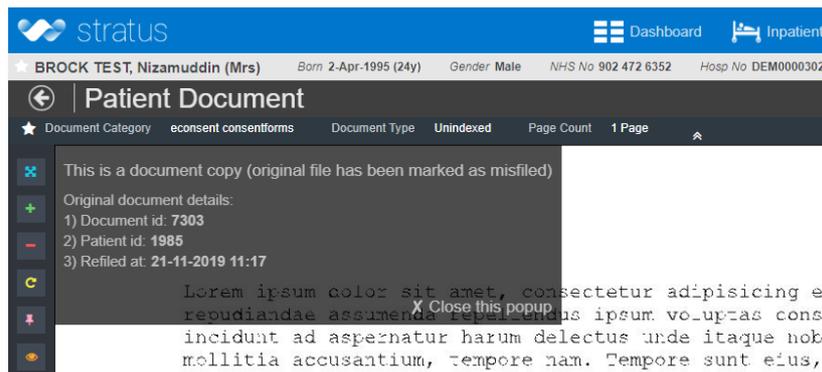
This document will be copied to the selected patient.

- 1) If this document is part of a parent/child link the associated documents will also be copied
- 2) A copy of this and any linked documents will remain in the original record, tagged as misfiled

Once a document has been refiled it can still be viewed in the original record, but this version will be automatically stamped as misfiled.



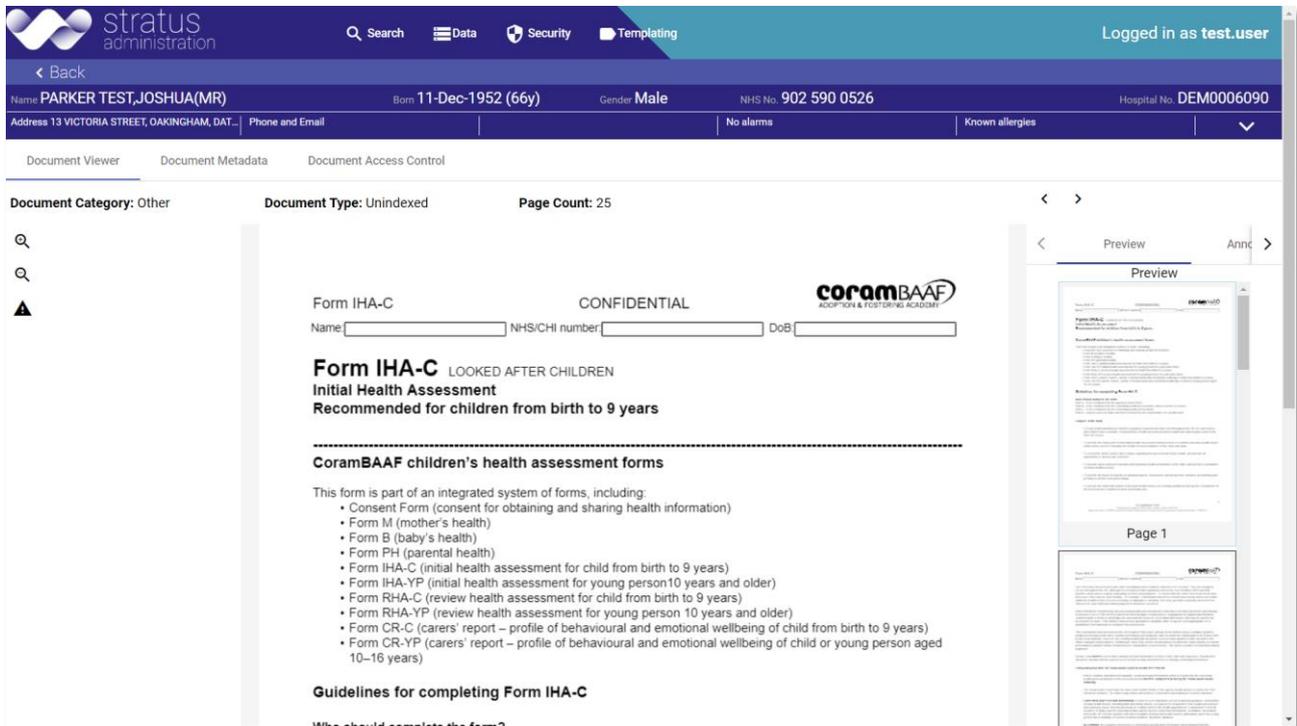
Clicking on the 'misfiled' text will open the refiled document in the correct patient record. This version of the document will also display details of the original assignment.



- **Delete document** – Clicking on **Delete Document** will prompt the user to confirm that they wish to proceed. The document is then completely removed from the system.
- **Export document as PDF** – Selecting this option will prompt the user to select a location to save the document as a PDF. The exported PDF will include any applicable annotations.
- **Open in viewer** – Select the **Open in viewer** option to view the full document and access further document related actions.

## Document Viewer

The document viewer displays the current document page with page preview thumbnails for quick navigation.



The screenshot shows the 'stratus administration' interface. At the top, there are navigation icons for Search, Data, Security, and Templating, along with the user 'test.user'. Below this is a patient header for 'PARKER TEST, JOSHUA (MR)' with details like birth date (11-Dec-1952), gender (Male), NHS No. (902 590 0526), and hospital No. (DEM0006090). The main area displays 'Document Category: Other', 'Document Type: Unindexed', and 'Page Count: 25'. The document content includes a 'Form IHA-C' header, a 'CONFIDENTIAL' warning, and a list of 'CoramBAAF children's health assessment forms'. A 'Preview' section on the right shows a thumbnail of the document page.



**Zoom in/Zoom out** – Controls to adjust preview size

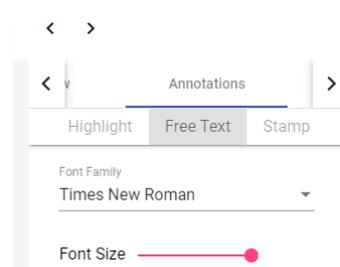


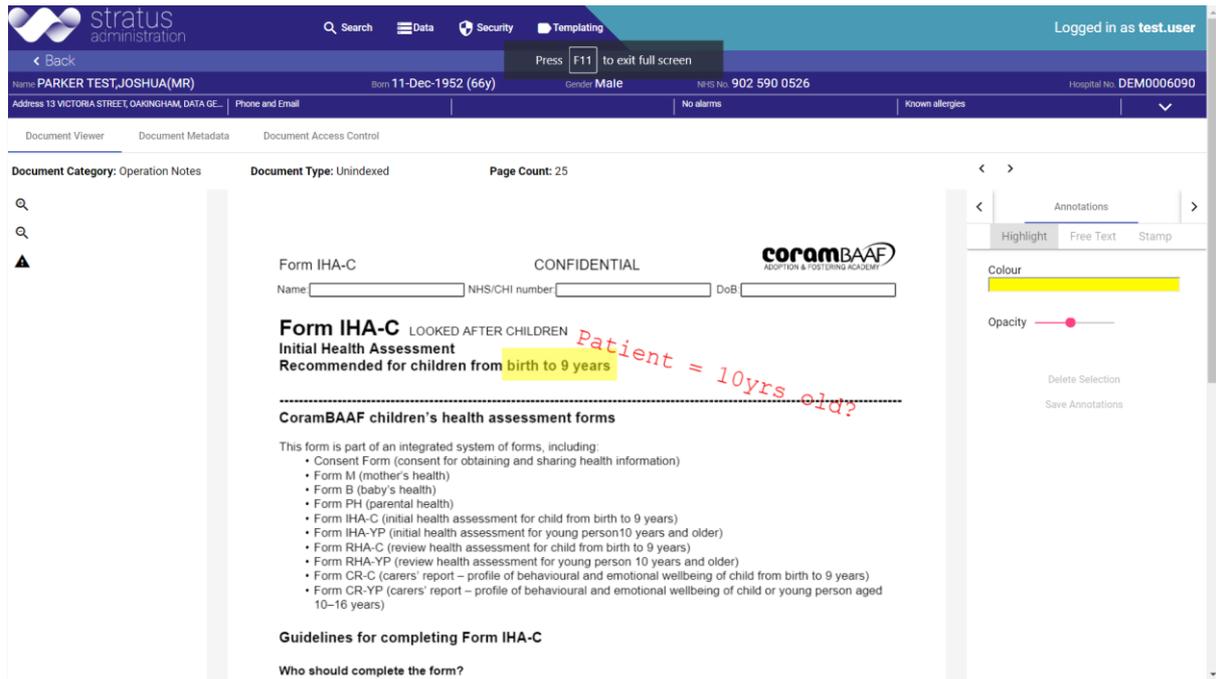
**Flag document** – Displays the pre-set action list. Selecting an action with optional free text will add the document to the [Document Actions] list.

## Annotations

Selecting the **Annotations** utility above the **Preview section and thumbnails** allows the annotation of the document using text highlights, free text and pre-set text stamps.

It should be noted that annotations can only be added to a parent document – however, annotating the appropriate page in a parent document will also update the indexed child document. Therefore, to annotate an indexed document click on the **[Go to parent]** link on the thumbnail section.





## Annotation Highlights

Highlighted annotations are added by selecting the **Highlight** option via the annotations menu, followed by a colour and opacity. Colour can be selected using a colour picker or by entering Hex/HSL/RGB values (i.e. R255 G255 B0 for **bright yellow**). Opacity controls the transparency of the highlight – by setting this to maximum the highlight will completely obscure the text, i.e. for redaction purposes. Click and drag a box to create the highlight then click on **[Save annotations]**.

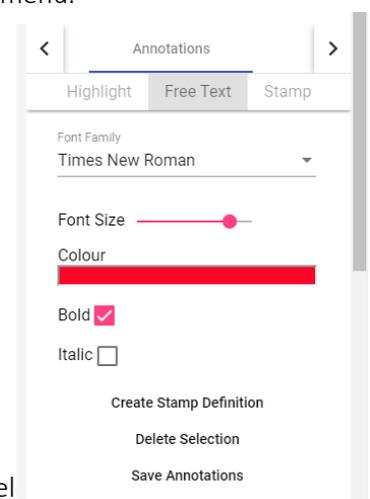
## Free Text

Free text entries can be added by selecting the **Free Text** option via the annotations menu.

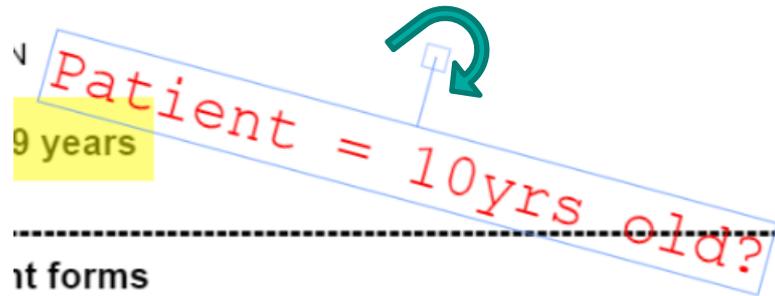
Ensure you choose the following formatting options before entering text:

- Font Family
- Font Size
- Colour
- Bold
- Italic

Click on the page where the text is required, and type any required text before selecting the **Free Text** option.



Once the text has been added it can be selected with a single click and rotated using the rotation tool if required.



It is also possible to create a stamp definition by clicking [Create Stamp Definition] which will make this available as a template for future use via the [Stamp] utility menu options.

## Stamps

Document Stamps are commonly used text entries that have been saved as a **Stamp Definition** using the free text tool. Select a stamp from the **Stamp** option via the annotations menu, and adjust the font details if required.

The forms have been revised after wide consultation and feedback collected over 10 years. They are designed for use throughout the UK, although it is recognised that regulations across the four countries differ and that practice varies across regions depending on local circumstances. To ensure that the forms meet local needs and processes, they may be used flexibly – for example, if information has been recorded previously and is accessible within the health record, it is not necessary to duplicate it. Similarly, not every question or prompt will need to be followed for each child and clinical judgement should be exercised.

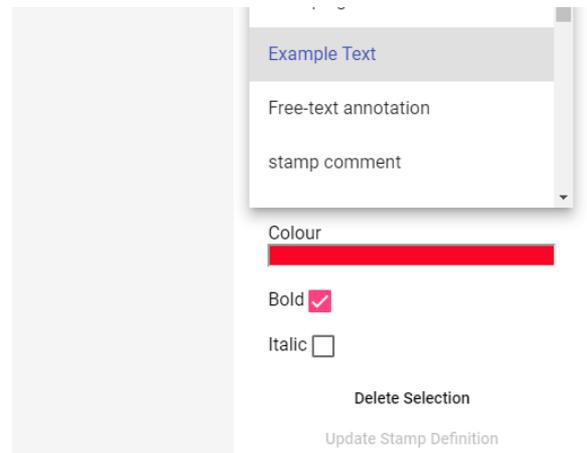
Part B should be completed by the assessing health professional who must have relevant experience and training to at least Level 3 of the RCPCH and RCN Intercollegiate Competencies. Regulations in England and Northern Ireland require a doctor to undertake the assessment; however, in Scotland and Wales, this may be carried out by a doctor or nurse. If the child is followed in a specialist or disability clinic, it may be most appropriate for a practitioner from that team to complete the assessment.

This examination and assessment are not required if they have already been carried out by a suitably qualified health professional in the three months immediately preceding the date on which the child began to be looked after by the local authority. However, the existing health plan should be reviewed and updated to take account of the child's changed circumstances. Additionally, there may well be circumstances in which the child's history or current presentation warrants further comprehensive examination or assessment. This will be a matter for individual clinical judgment.

Secure email must be used when sharing relevant information on these forms with other agencies. Practitioners should be familiar with the systems in use in their locality and protocols for sharing confidential information.

**Part A and procedure for social worker prior to health assessment:**

- Part A contains important demographic, social and legal information which is required by the assessing health professional prior to the assessment and **must be completed in full by the social worker/local authority.**
- The social worker must state the name and contact details of the agency health adviser to whom the form should be returned. The child's legal status and holder/s of parental responsibility/ies must be indicated.



Clicking on the page will add the full stamp text to that point – the text can then be selected and rotated as applicable.

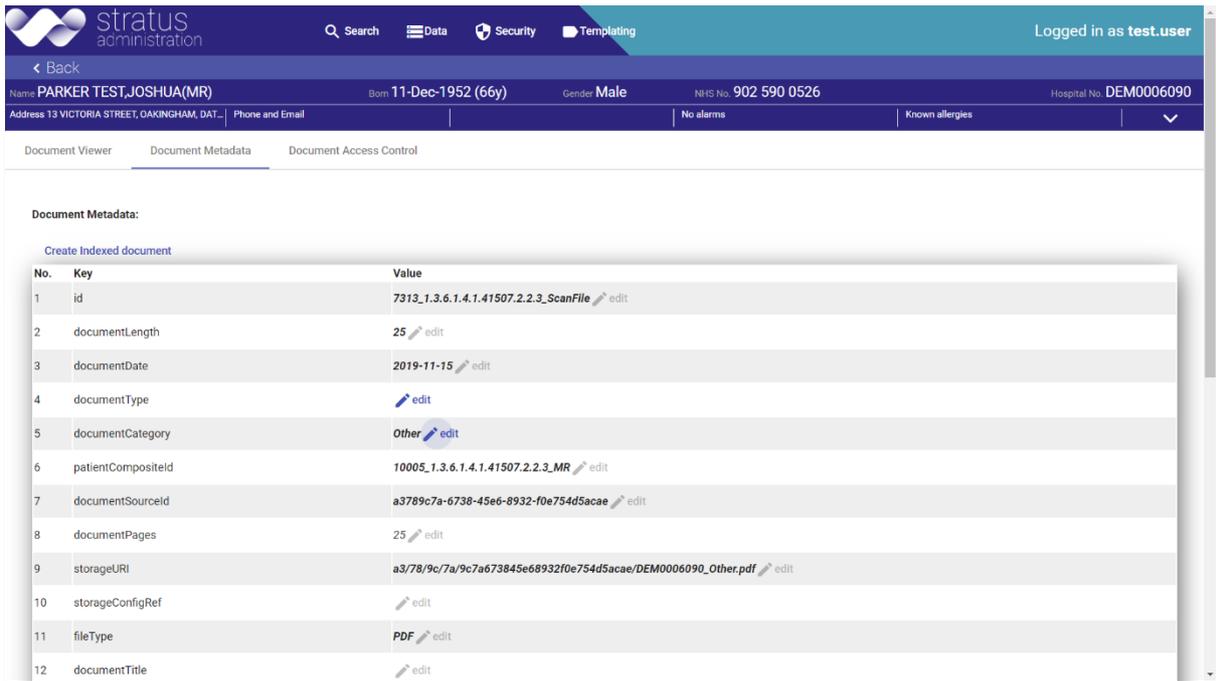
## Notes

The notes menu option opens a free text document notes box. Any notes entered and saved here will be visible to admin users but are *not* reflected in the front-end interface.

## Document Metadata

Selecting the **[Document Metadata]** menu option will show the document's associated metadata including tools to edit where appropriate.

Selecting the **edit** option next to an entry will open an appropriate edit box. This will either be free text or display a menu of available options.

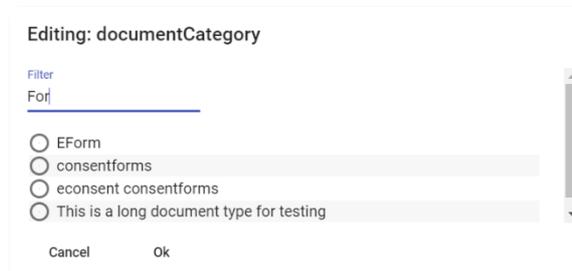


**Document Metadata:**

Create Indexed document

No.	Key	Value
1	id	7313_1.3.6.1.4.1.41507.2.2.3_ScanFile
2	documentLength	25
3	documentDate	2019-11-15
4	documentType	
5	documentCategory	Other
6	patientCompositeId	10005_1.3.6.1.4.1.41507.2.2.3_MR
7	documentSourceId	a3789c7a-6738-45e6-8932-f0e754d5acae
8	documentPages	25
9	storageURI	a3/78/9c/7a/9c7a673845e68932f0e754d5acae/DEM0006090_Other.pdf
10	storageConfigRef	
11	fileType	PDF
12	documentTitle	

When selecting an entry from the menu it is possible to filter the available options by typing in part of the required search term – i.e. partial searching. Select the radio button next to the required term and click **[OK]**.



**Editing: documentCategory**

Filter  
For

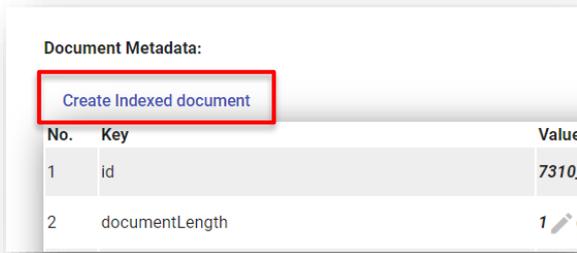
- EForm
- consentforms
- econsent consentforms
- This is a long document type for testing

Cancel    Ok

## Manually Indexed Documents

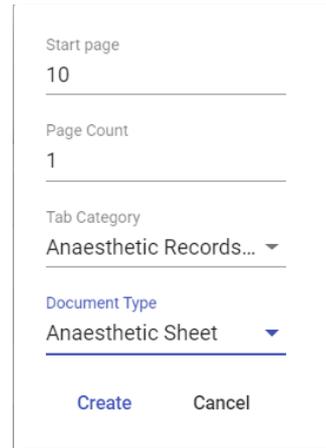
Stratus processes uplifted documents through a templating system which automatically creates linked child documents based on OCR templates – i.e. Extracting an anaesthetic chart from a bulk patient notes scan file. It is also possible to manually create child documents.

- From the **Document Metadata:** tab select the **[Create Indexed document]** option. This will present the option of selecting a start page, page count and document category/type.



**Document Metadata:**

No.	Key	Value
1	id	7310
2	documentLength	1



Start page  
10

Page Count  
1

Tab Category  
Anaesthetic Records...

Document Type  
Anaesthetic Sheet

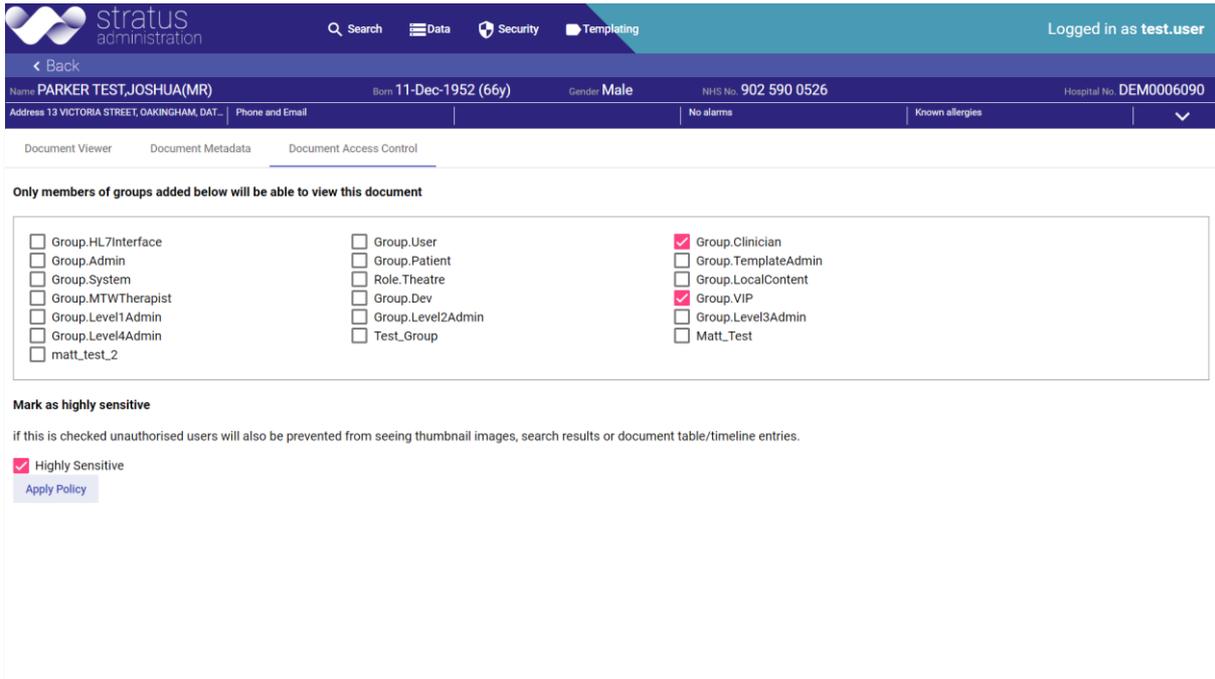
Create Cancel

- Select the page which marks the beginning of the required child document.
- Specify the 'Page Count' (i.e. Select '1' for a single page document) to specify the number of pages.
- Select the 'Tab Category' – this drop-down list shows all tab categories currently set up on your system.
- Select the 'Document Type' if required as this item is optional.

This will create a new linked document with specified criteria in the chosen tab category. The original parent document remains unchanged.

## Document Access Control

Document-specific access is selected from the Document Access Control menu. This displays the current access permissions for the selected document which are controlled via permission groups such as those set in Active Directory.



stratus administration

Search Data Security Templating

Logged in as test.user

Back

Name: PARKER TEST, JOSHUA (MR) Born: 11-Dec-1952 (66y) Gender: Male NHS No: 902 590 0526 Hospital No: DEM0006090

Address: 13 VICTORIA STREET, OAKINGHAM, DAT... Phone and Email No alarms Known allergies

Document Viewer Document Metadata Document Access Control

Only members of groups added below will be able to view this document

<input type="checkbox"/> Group.HL7Interface	<input type="checkbox"/> Group.User	<input checked="" type="checkbox"/> Group.Clinician
<input type="checkbox"/> Group.Admin	<input type="checkbox"/> Group.Patient	<input type="checkbox"/> Group.TemplateAdmin
<input type="checkbox"/> Group.System	<input type="checkbox"/> Role.Theatre	<input type="checkbox"/> Group.LocalContent
<input type="checkbox"/> Group.MTWTherapist	<input type="checkbox"/> Group.Dev	<input checked="" type="checkbox"/> Group.VIP
<input type="checkbox"/> Group.Level1Admin	<input type="checkbox"/> Group.Level2Admin	<input type="checkbox"/> Group.Level3Admin
<input type="checkbox"/> Group.Level4Admin	<input type="checkbox"/> Test_Group	<input type="checkbox"/> Matt_Test
<input type="checkbox"/> matt_test_2		

Mark as highly sensitive

if this is checked unauthorised users will also be prevented from seeing thumbnail images, search results or document table/timeline entries.

Highly Sensitive

Apply Policy

If no groups are selected in this view, then there will be **no restrictions on the document** for authenticated Stratus users. However, if one or more groups are selected any Stratus user who is not a member of at least one of the selected groups will not be able to view the full screen document image - although they will be able to see thumbnails, metadata and timeline entries.

If the “Highly Sensitive” option is ticked nothing will appear on the patient record to indicate the existence of the document except for members of the authorised groups.

## Search Options

Clicking on the **Search** menu options give user the option to undertake the following searches:

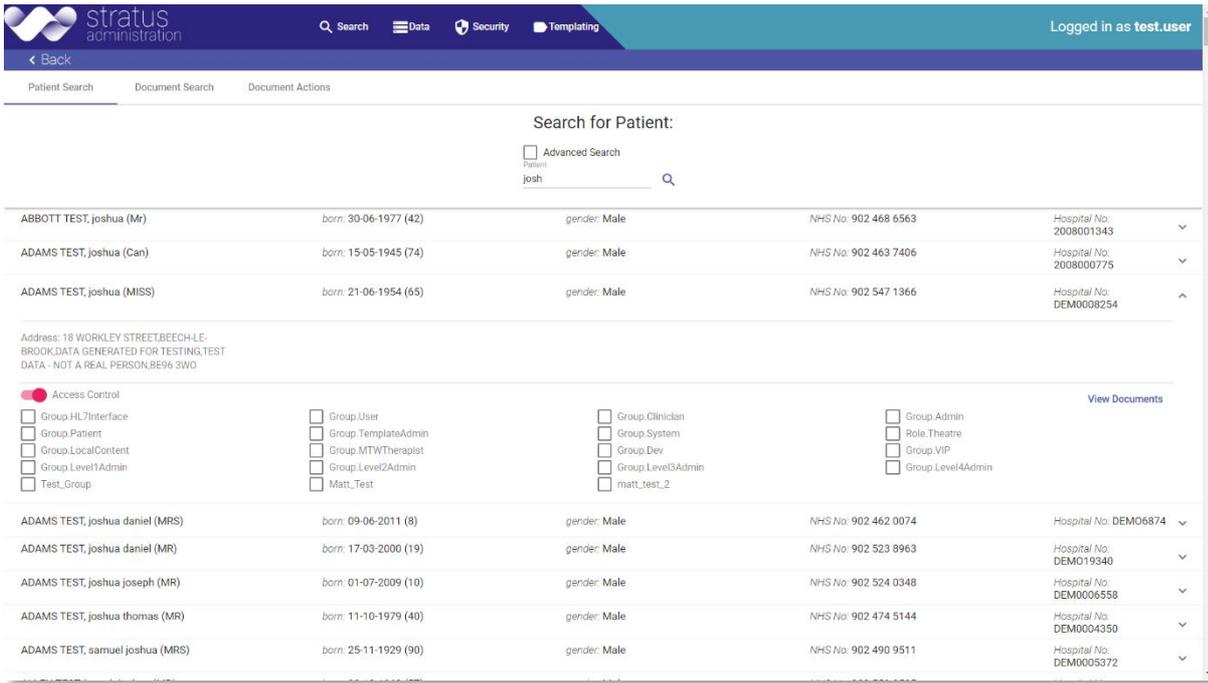
- Patient Search
- Document Search
- Document Actions

## Patient Search

It is possible to search for patients using NHS number, Hospital number or Name in the quick search field including partial names.

Clicking on **Advanced Search** allows the entry of multiple values including gender and date of birth.

Once selected the patient demographic details are shown in a banner at the top of the screen.



The screenshot shows the 'stratus administration' interface. At the top, there are navigation tabs for 'Patient Search', 'Document Search', and 'Document Actions'. The main content area is titled 'Search for Patient:' and shows a search bar with 'josh' entered. Below the search bar, there is a table of search results. The first three rows are expanded, showing demographic details for 'ABBOTT TEST, joshua (Mr)', 'ADAMS TEST, joshua (Can)', and 'ADAMS TEST, joshua (MISS)'. Each row includes fields for 'born', 'gender', 'NHS No', and 'Hospital No'. Below the table, there is an address section: 'Address: 18 WORKLEY STREET, BEECH-LE-BROOK, DATA GENERATED FOR TESTING, TEST DATA - NOT A REAL PERSON, BE96 3WQ'. Below the address, there is an 'Access Control' section with a red toggle switch and a list of checkboxes for various user groups. A 'View Documents' link is also present.

Search Results	born	gender	NHS No	Hospital No
ABBOTT TEST, joshua (Mr)	30-06-1977 (42)	Male	902 468 6563	2008001343
ADAMS TEST, joshua (Can)	15-05-1945 (74)	Male	902 463 7406	2008000775
ADAMS TEST, joshua (MISS)	21-06-1954 (65)	Male	902 547 1366	DEMO008254
Address: 18 WORKLEY STREET, BEECH-LE-BROOK, DATA GENERATED FOR TESTING, TEST DATA - NOT A REAL PERSON, BE96 3WQ				
<input checked="" type="checkbox"/> Access Control <input type="checkbox"/> Group_HLTInterface <input type="checkbox"/> Group_Patient <input type="checkbox"/> Group_LocalContent <input type="checkbox"/> Group_Level1Admin <input type="checkbox"/> Test_Group <input type="checkbox"/> Group_User <input type="checkbox"/> Group_TemplateAdmin <input type="checkbox"/> Group_MTWTherapist <input type="checkbox"/> Group_Level2Admin <input type="checkbox"/> Matt_Test <input type="checkbox"/> Group_Clinician <input type="checkbox"/> Group_System <input type="checkbox"/> Group_Dev <input type="checkbox"/> Group_Level3Admin <input type="checkbox"/> matt_test_2 <input type="checkbox"/> Group_Admin <input type="checkbox"/> Role_Theatre <input type="checkbox"/> Group_VIP <input type="checkbox"/> Group_Level4Admin				
ADAMS TEST, joshua daniel (MRS)	09-06-2011 (8)	Male	902 462 0074	DEMO6874
ADAMS TEST, joshua daniel (MR)	17-03-2000 (19)	Male	902 523 8963	DEMO19340
ADAMS TEST, joshua joseph (MR)	01-07-2009 (10)	Male	902 524 0348	DEMO006558
ADAMS TEST, joshua thomas (MR)	11-10-1979 (40)	Male	902 474 5144	DEMO004350
ADAMS TEST, samuel joshua (MRS)	25-11-1929 (90)	Male	902 490 9511	DEMO005372

When the required patient has been found clicking on the  arrow next to their demographic details to display an expanded panel with their address data and the following options:

## Access Control

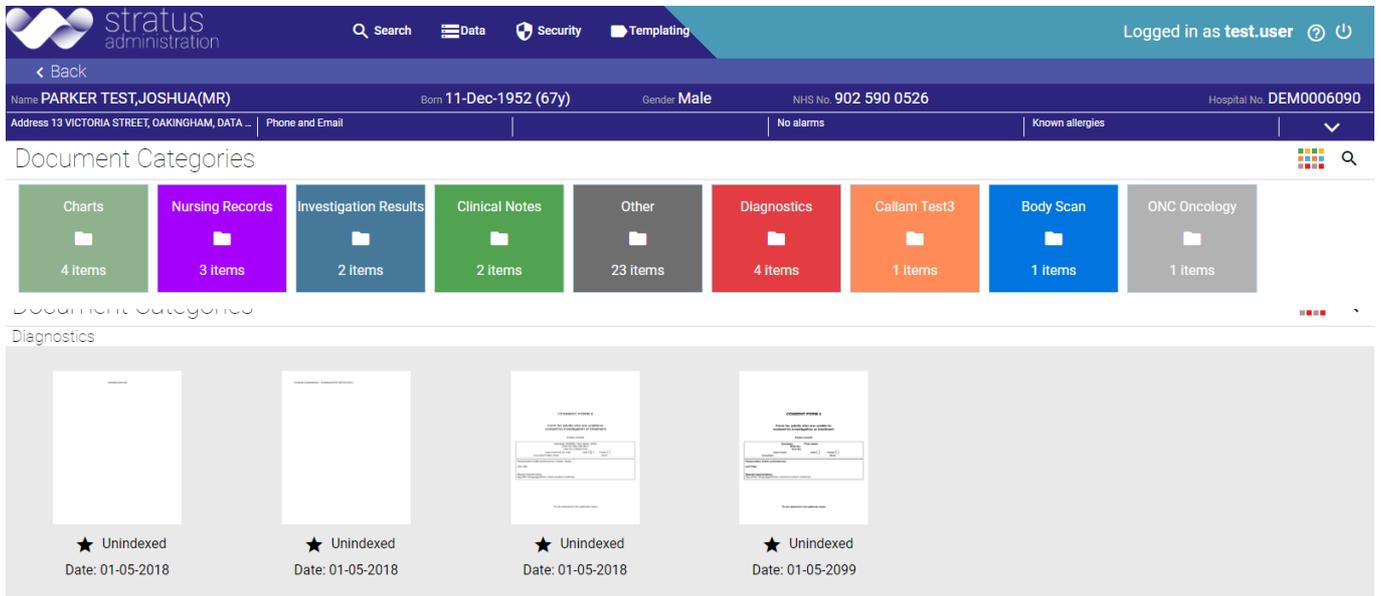
### Access Control

Clicking Access Control displays all available system security groups. A patient without any checks next to these can be accessed by any authenticated Stratus user. Ticking one or more groups will limit access only to users who belong to these groups.

## View Documents

### View Documents

Use this option to load the patient banner and all related document categories and documents for the patient.



The screenshot shows the 'stratus administration' interface. At the top, there are navigation tabs for Search, Data, Security, and Templating. The user is logged in as 'test.user'. The patient banner displays: Name PARKER TEST, JOSHUA (MR), Born 11-Dec-1952 (67y), Gender Male, NHS No. 902 590 0526, Hospital No. DEM0006090. Below the banner, there are document categories: Charts (4 items), Nursing Records (3 items), Investigation Results (2 items), Clinical Notes (2 items), Other (23 items), Diagnostics (4 items), Callam Test3 (1 item), Body Scan (1 item), and Onc Oncology (1 item). The 'Diagnostics' category is selected, showing a list of four documents, all marked as 'Unindexed' with their respective dates: 01-05-2018, 01-05-2018, 01-05-2018, and 01-05-2019.

Clicking on a category will display all documents. To return to the category menu click the  category icon.

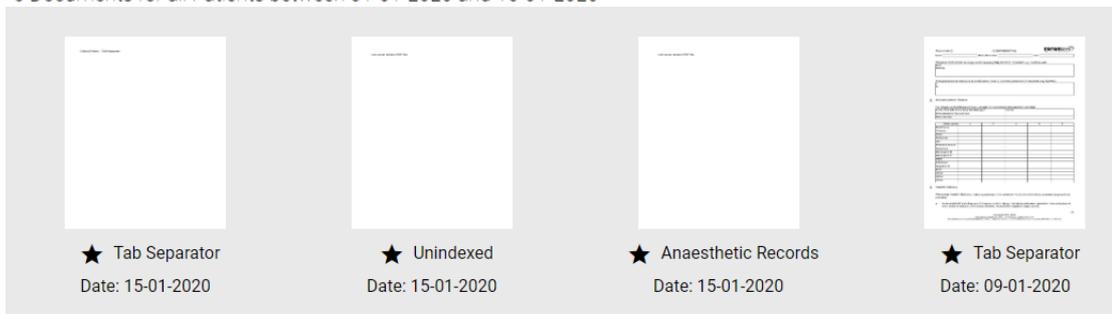
## Document Search

The Document Search function returns all documents with a **document date** value between two dates, irrespective of patient. Leaving the 'To' date field blank will default to today's date.

### Document Search:

From  To

6 Documents for all Patients between 01-01-2020 and 16-01-2020



The screenshot shows search results for 6 documents. The first three are 'Tab Separator' (Date: 15-01-2020), 'Unindexed' (Date: 15-01-2020), and 'Anaesthetic Records' (Date: 15-01-2020). The fourth is another 'Tab Separator' (Date: 09-01-2020). The remaining two documents are not visible in the screenshot.

## Document Actions

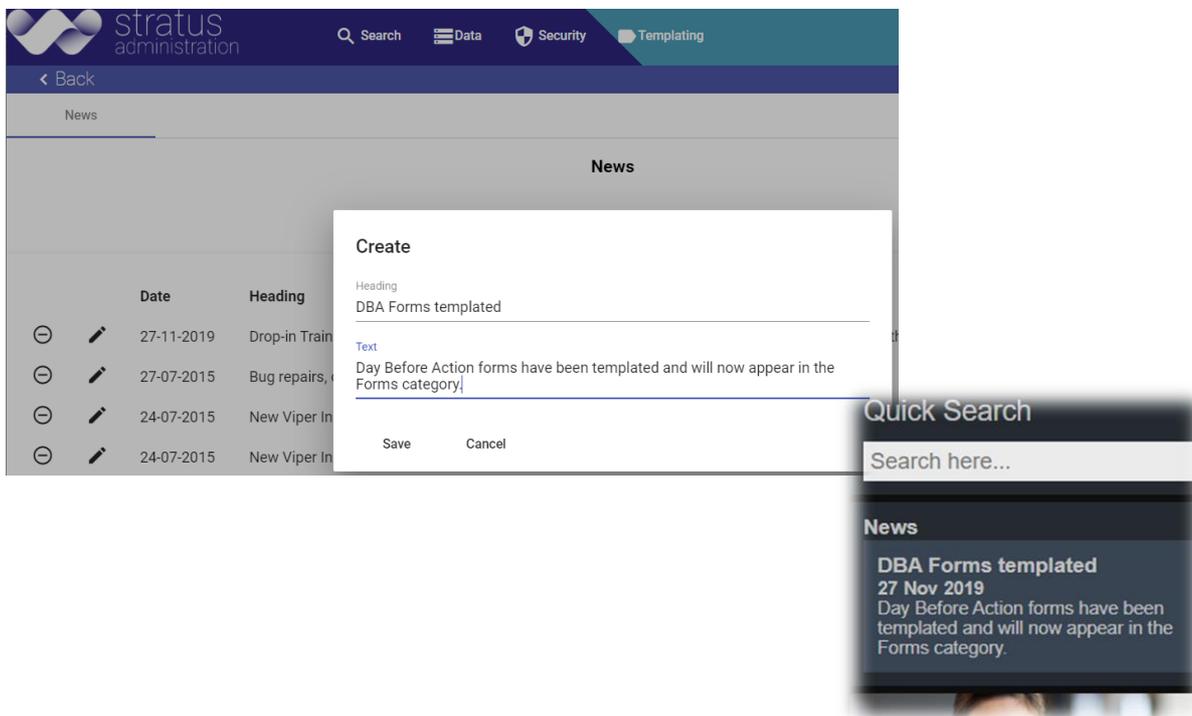
Displays the outstanding document actions list which is also accessible via the dashboard.

## Data

News items to be shown on the main Stratus dashboard can be added via the  **Data** menu.

Previous news items are listed and can be searched for by entering keywords from the header or text.

Clicking on  icon allows the creation of a new news item which consists of a Heading and Text – the date is added automatically.



The screenshot shows the 'stratus administration' interface. The top navigation bar includes 'Search', 'Data', 'Security', and 'Templating'. The main content area is titled 'News' and contains a table of news items. A 'Create' modal is open, showing the following details:

Date	Heading
27-11-2019	Drop-in Train
27-07-2015	Bug repairs, v
24-07-2015	New Viper In
24-07-2015	New Viper In

The 'Create' modal contains the following text:

**Create**

Heading  
DBA Forms templated

Text  
Day Before Action forms have been templated and will now appear in the Forms category!

Save Cancel

The 'Quick Search' overlay shows a search bar with the text 'Search here...' and a list of news items, including the one being created: 'DBA Forms templated' dated '27 Nov 2019'.

## Security

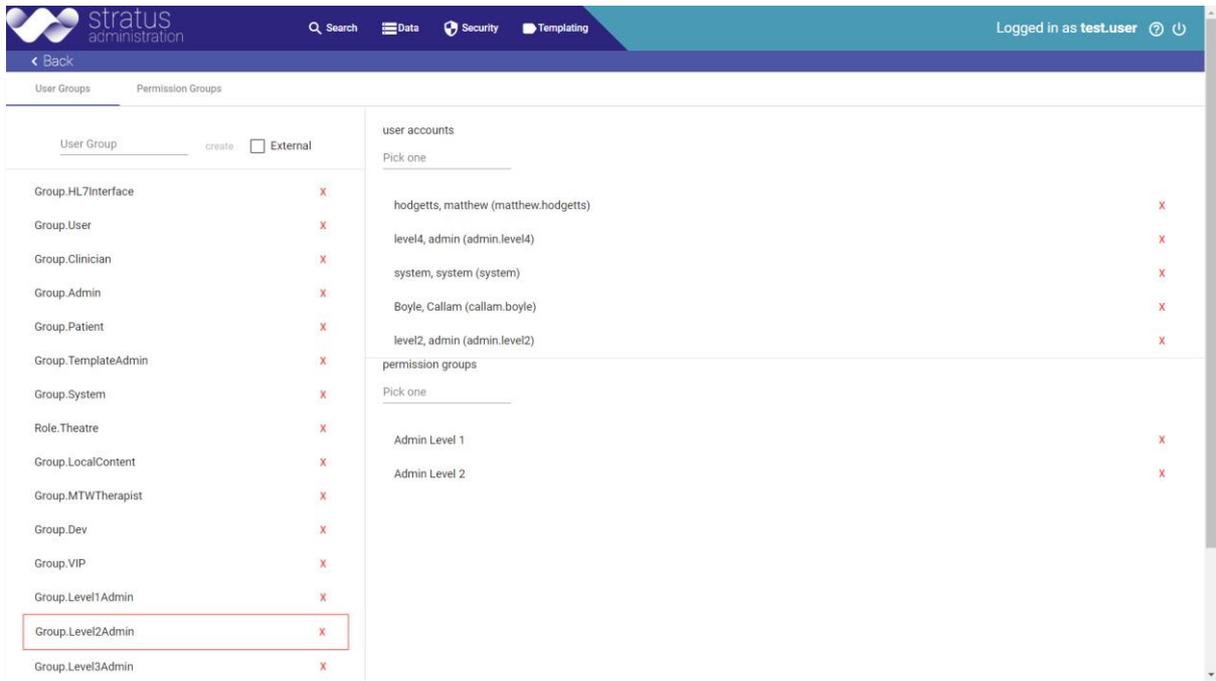


The **Security** menu controls user access to administration functions. Users are assigned to User Groups which in turn have one or more Permission Groups specifying what functions they can access. Each user group can have multiple permission groups and have access to a function providing it exists in at least one of these.

## User Groups

To add a user to an existing group first select the Security menu and click once to highlight the required group. The right-hand panel will change to show existing members – to add another user type in part of their username in the user accounts box.

A drop-down list will show all matching users and clicking a name will add them to the list.



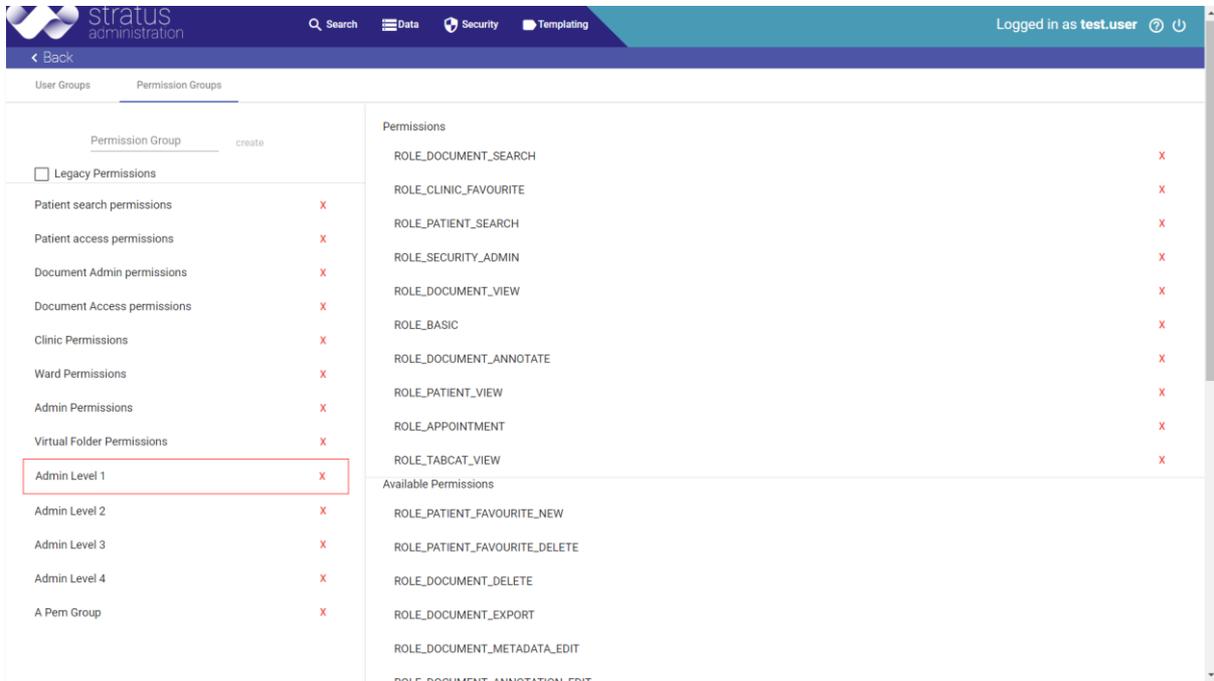
The screenshot shows the 'stratus administration' interface. The top navigation bar includes 'Search', 'Data', 'Security', and 'Templating'. The user is logged in as 'test.user'. The main content area is divided into two panels: 'User Groups' and 'Permission Groups'. The 'User Groups' panel lists various groups with a red 'X' icon to the right of each name. The 'Permission Groups' panel has two sections: 'user accounts' and 'permission groups', each with a 'Pick one' dropdown menu. The 'user accounts' section lists several users with red 'X' icons to the right of their names. The 'permission groups' section lists 'Admin Level 1' and 'Admin Level 2' with red 'X' icons to the right of their names. The 'Group.Level2Admin' entry in the 'User Groups' list is highlighted with a red border.

To add further permissions to the existing user group, click in the **permission groups** field and type part of the permission group you require (see below for details on how to add permission groups).

Clicking the **[X]** to the right of an existing user will remove them from this group.

## Permission Groups

Select the Permission Groups tab to display existing groups:



Click once to highlight the required group and display the existing permissions and additional available permissions on the right-hand side of the screen.

Clicking once on an available permission will move it into the permission group, allowing all users who are in a user group linked to that permission group to access the function.

Clicking on the [X] to the right of a permission will remove it from that permission group.

## Stratus Security Group Permissions

The following list details available permissions and their related admin app function:

Permission Name	Description
ROLE_AUDIT_LOG	Access Event Viewer
ROLE_DOCUMENT_ANNOTATE	Add annotations to document
ROLE_DOCUMENT_ANNOTATION_EDIT	Edit existing annotations
ROLE_DOCUMENT_DELETE	Delete existing annotations
ROLE_DOCUMENT_EXPORT	Export selected document
ROLE_DOCUMENT_METADATA_EDIT	Edit document metadata
ROLE_DOCUMENT_MOVE	Re-file document to new patient
ROLE_DOCUMENT_RESTRICTION	Restrict access to the selected document
ROLE_DOCUMENT_SEARCH	Search for a document by date
ROLE_DOCUMENT_VIEW	View document with thumbnails
ROLE_NEWS_EDIT	Edit the UI dashboard news
ROLE_PATIENT_SEARCH	Search for a patient by demographic data
ROLE_PATIENT_VIEW	Display selected patient banner
ROLE_SECURITY_ADMIN	Access to security groups and user permissions

## Document Control

Title	Stratus System Manual		
Owner	Wellbeing Training Manager	Date Created	26/11/2018
File Ref.	EHR_CRIB_750_Stratus_System_Manual_V3.0.docx		
CRIS Version			
Change History			
Issue	Date	Author / Editor	Details of Change
D1.0	26/11/2018	Chris Burdett	Draft Issue used to produce Helpfiles
V1.0	07/07/2019	Emma Savage-Mady	Reviewed, rebranded and First Issue in CRIB format
D2.0	06/11/2019	Chris Burdett	Updates to include the new System Admin functions
D2.1	16/01/2019	Emma Savage-Mady	Reviewed, rebranded and 2 <sup>nd</sup> issue in CRIB Format
D3.0	05/03/2020	Emma Brown	Removed metadata checkbox information.
V2.0	06/03/2020		
V3.0	11/02/2021	Emma Brown	Rebranded.
V3.1	14/02/2023	Emma Brown	Fix TOC.
Review Date	14/02/2024		