Shared Record Viewer (SRV)

First access

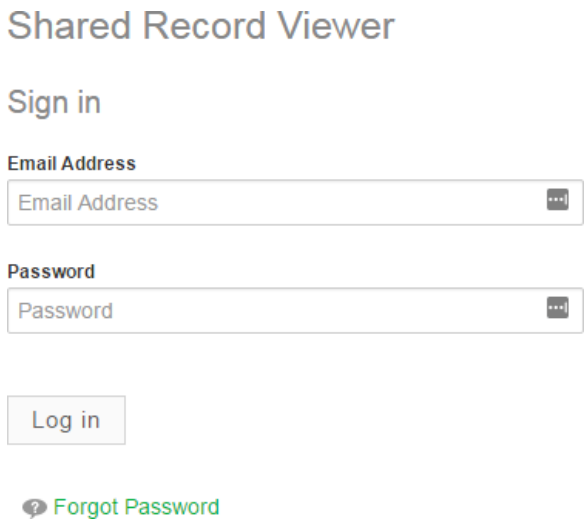
You will receive an email from noreply@sharedrecordviewer.healthcaregateway.co.uk

Select the link within the email to be redirected to the SRV sign in page. Here you will be prompted to enter a new password. The password you enter must be alphanumeric, at least 6 characters long, contain a minimum of one number, one upper case and one lower case letter.

You will then be prompted to setup a personal security question; your personal security questions help us verify your identity when you can't remember your username or password.

Sign in

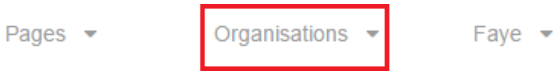
To sign into the SRV enter your email address, password and select log in.



You will be presented with the organisation(s) you are assigned to. Select ‘View’ next to the organisation you wish to select.

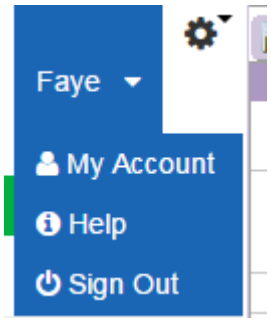
You will then be presented with a list of options; these options are relevant to your user role.

NB. If at any point during a session you wish to swap the organisation you are viewing, select organisations from the organisations menu at the top right hand side of the screen.

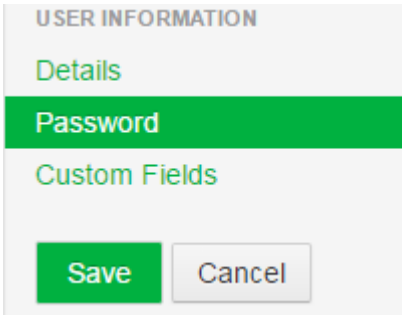


How to change your password

Select 'My Account' from the drop down menu at the top right hand side of the screen



In the user information box select 'Password'.



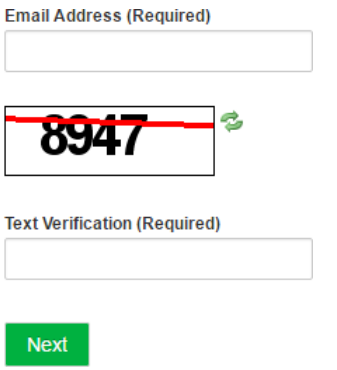
Enter a new password.

NB. Here you will have the option to set a password reminder; you can select a question from a pre-populated list, or select write my own question from the drop down list.

Select Save

NB. If you enter your password incorrectly three times you will be logged out of the SRV and advised to contact your organisation system administrator.

Alternatively you can select ‘Forgot Password’ from the SRV sign in page. You will be asked to enter your email address and confirm the text verification presented to you.



You will then be presented with your personal security questions, if answered correctly you will be sent, via email a link to reset your password.

Password expiration

Your password will expire every 90 days. You will be warned that your password is due to expire prior to reaching the 90 day limit. At this point you can reset your password by following the ‘How to change your password’ instructions above.

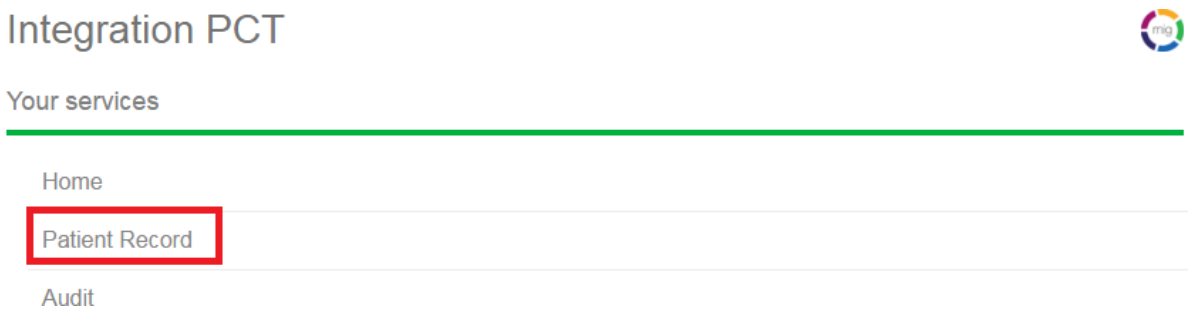
If you are notified that your password has expired, contact the system administrator for your organisation. Alternatively you can select ‘Forgot Password’ from the SRV sign in page.

NB. If your account is locked, only the system administrator for your organisation will have the access rights to unlock your account.

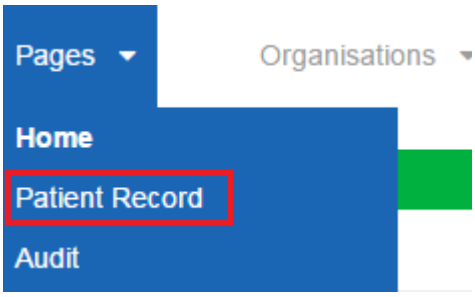
Accessing a patient record

Select Patient Record from within your services or via the pages tab at the top right hand side of the screen

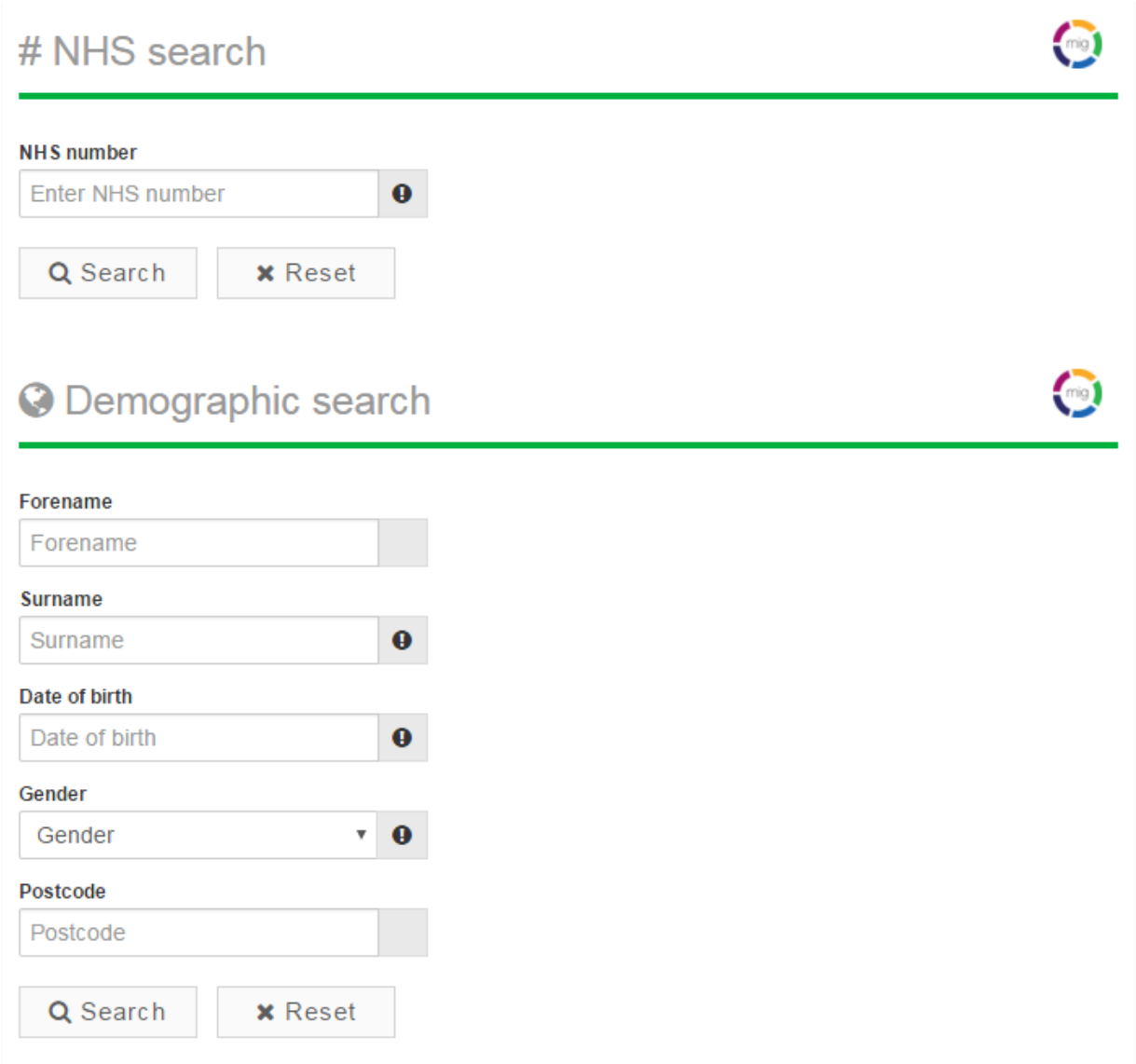
Within your services



Pages tab



You have the option to search for a patient using their unique NHS number or by entering their demographic details.



NB. The fields marked with an exclamation mark are mandatory and must be completed in order to search for a patient using their demographic details.

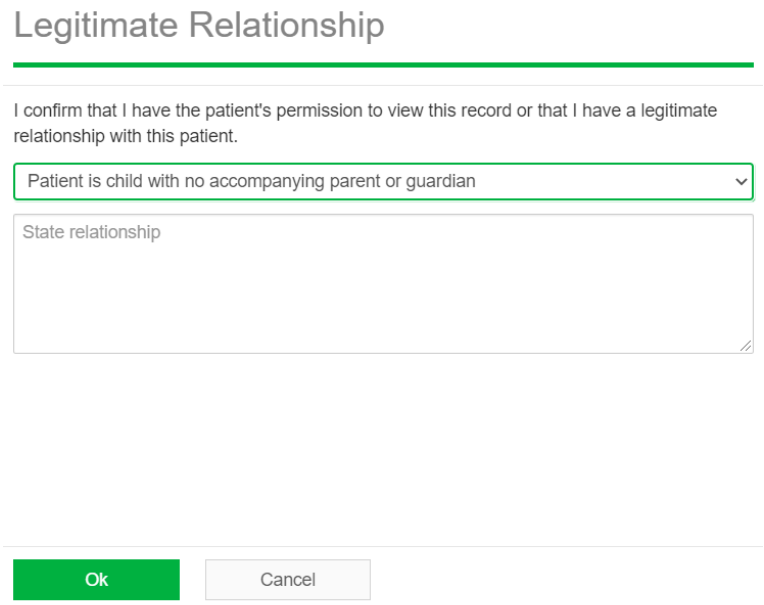
You will be presented with the patient(s) who meet your search criteria at the right hand side of the screen.

Select the patient

NB. If you are not presented with a patient that you expected to find this could be for a number of reasons. For example the patient has not consented to share their records with your organisation.

Next you will then be presented with the Legitimate Relationship dialog box.

Select the applicable consent reason from the drop down.

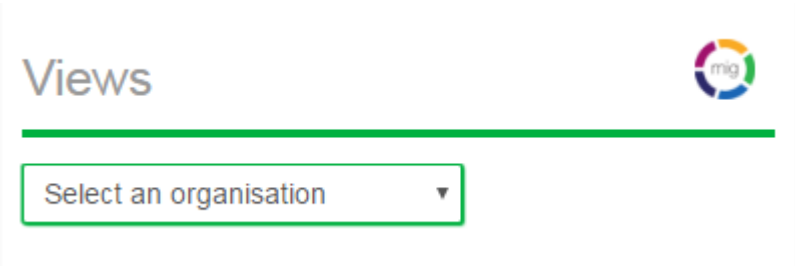


NB. If you select the reason “Patient is child with no accompanying parent or guardian” the system will prompt you to enter a free text reason.

Select ‘OK’

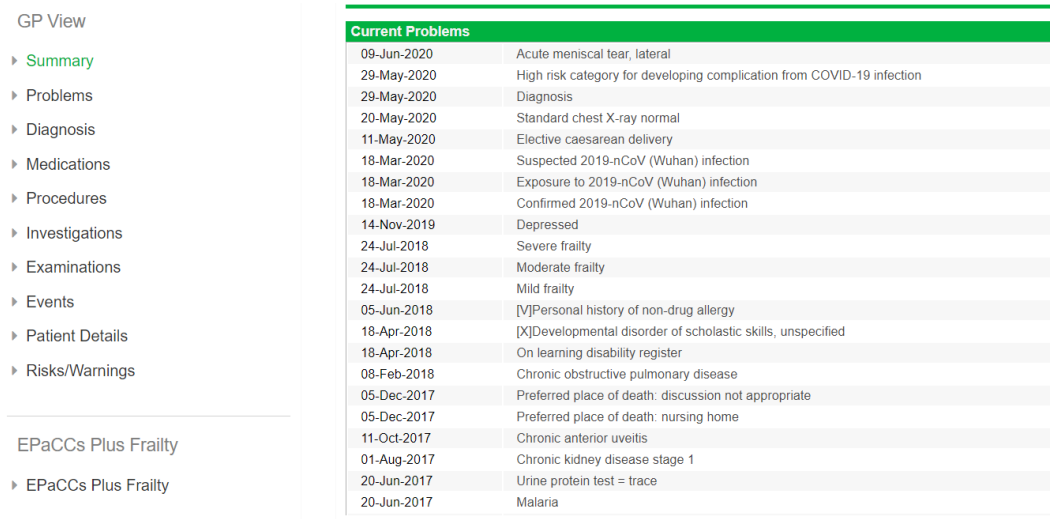
You will then be taken into the Patient Record screen for that patient. The patient details are at the top of the screen.

Select the organisation you wish to view data from the drop down on the left hand side under “Views”.



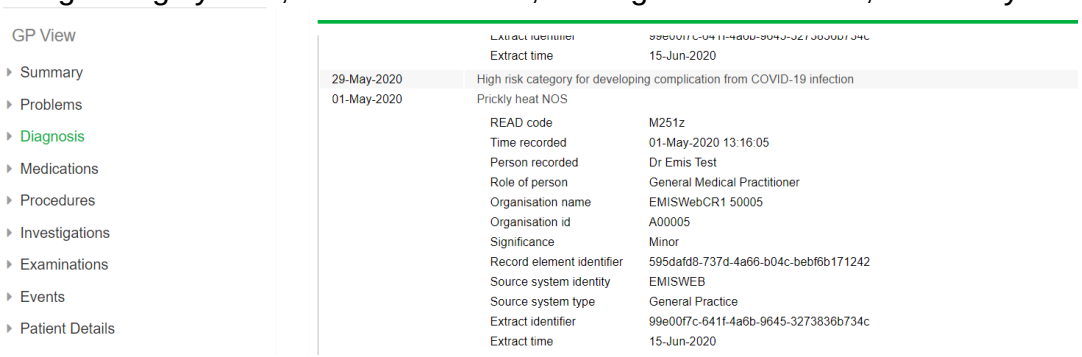
Down the left hand side of the screen you can access the patient information being shared with your organisation.

Each section contains different information; by clicking on the word “Summary” for example you will be taken into the summary section for the patient.



To access different views of information, select the view on the left hand side.

To see more information about a specific entry click anywhere on the entry and it will expand to give you further information, such as who recorded the entry into the originating system, what their role is, the organisation name, source system, etc.



Click on the entry again and the additional information will minimise.

To change patient select the Deselect patient button on the selected patient information box.

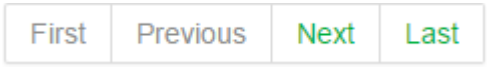
Please be aware that in certain sections there may be multiple screens:

Medications - defaults to current medication, but you can click on Past Medication or medication Issues to see information relevant to that section header.

Investigations - Recent tests, Biochemistry, ECG, Haematology, Imaging, Microbiology, Cytology, Others, Physiology, Urinalysis (defaults to recent tests).

Events - Encounters, referrals and admissions (defaults to encounters).

Audit Trail

- Select audit from within your organisation options or via the pages tab at the top right hand side of the screen.
- Select 

at the bottom of the screen to view earlier audit results.
- To view detailed audit information, use the search pane on the right hand side to apply a filter by:

Name	Type	Default	Notes
Time	Single select	Any	Allows you to select Any, Last Hour, Today and Yesterday. If any is selected the date range is enabled
Date	Date range	Blank	Allows you to select a date range. You can choose one or both
Users	Multi select	Any	Allows you to select the user/users that you wish to view
Actions	Multi select	Any	Allows you to select the specific actions that you wish to view
Detail	Single select	Any	Allows you to filter the Actions by a detail combined with the Action filter applied above
Filter	Text	Blank	The value that applies to the detail filter

- To remove the filter select Clear.

- There is also an Export button that will allow you to export the results of the audit search to a .csv file.

Global settings

- There are a number of global settings on your and your colleagues' accounts detailed below:

Configuration item	Purpose	Default setting
Password expiration	**Maximum age:** The maximum time that a password is valid, before it needs to be changed again	30 days
	Warning time: The time before a password expires, in which to warn the user of the upcoming password expiration	3 days
	Grace limit: The number of logins allowed after the password has already expired	0
Portal timeout	This is the length of inactivity before the portal times out and the user is forced to log back in	10 minutes
User account lockout	**Maximum failure:** The maximum number of failed login attempts before the account is locked out	3
	Reset failure count: The time before the "failed login count" is reset	10 minutes
	Lockout duration: The time that a user is locked out, preventing them from logging in	Until unlocked by an administrator
Password history	**History enabled:** Enable tracking of password history, to prevent reuse of old passwords	On
	History count: The number of passwords to keep in the history	6
Syntax checking	**Minimum length:** The minimum length of a password	6 characters
	Minimum numbers: This determines the minimum number of numbers in the user's password	1
	Minimum upper case: This determines the minimum number of upper case letters in the user's password	1
	Minimum lower case: This determines	0

	the minimum number of lower case letters in the user's password	
Password Reset	**Change required:** if this is checked then a user is required to change their password when they first log in	On
	Minimum age: This determines how long a user must wait before changing their password again	None
	Reset ticket max: This determines how long password reset link is valid	1 day

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