MEDIVIEWER – SAVE, EDIT AND SHARE FILTERS FOR USE AGAINST ANY PATIENT'S HEALTH RECORD

By creating a Saved Filter, you allow them to be easily applied to any patient's Health Record. Saved Filters consist of one or more of the Trust's Document Types and/or a keyword that appears typed within any Page.
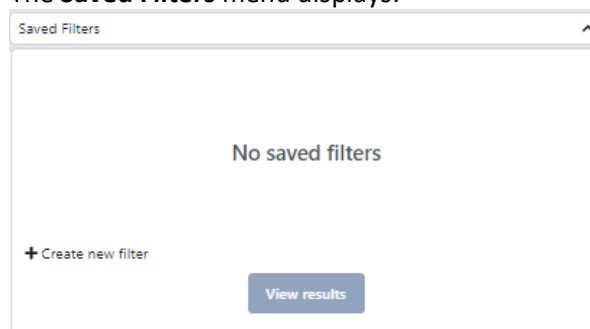
The following tasks can be carried out from within your Saved Filters field:

- Create a Filter and Save it
- Edit a Saved Filter
- Delete a Saved Filter
- Accept / Reject Saved Filters shared with you
- Share a Saved Filter
    - Manage a Shared Filter

### CREATE A FILTER TO SAVE

Whilst in a patient's Health Record, click into the **Saved Filters** field at the top of the **Bundles** View, or **Funnel** icon if reduced to a sidebar	The **Saved Filters** menu displays: Saved Filters No saved filters + Create new filter View results To use a Saved Filter that already exists, click into the relevant tickbox then click the **View Results** button.

Click **Create New Filter**
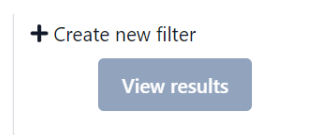 	
 + Create new filter
 View results
	The **Create New Filter** window displays:
	
	 Create filter
	 Document type
	 Refine the filter by selecting one or more document types to match against.
	 Search for document type
	 1. ☐ Discharge note & Prescription
	 2. ☐ MDM Charts & Forms
	 3. ☐ Correspondence
	     1. ☐ UHSussex RSCH A&E Discharge Summary
	     2. ☐ IP Discharge Summary
	     3. ☐ FEES Appointment Letter
	 Text
	 Refine the filter by adding one or more words to search for in a document.
	 Filter text
	 Filter name (required)
	 Filter name
	 Cancel Save
	
	 As the Document Types list will be very long, you may wish to use the **Search for Document Type** field at the top.

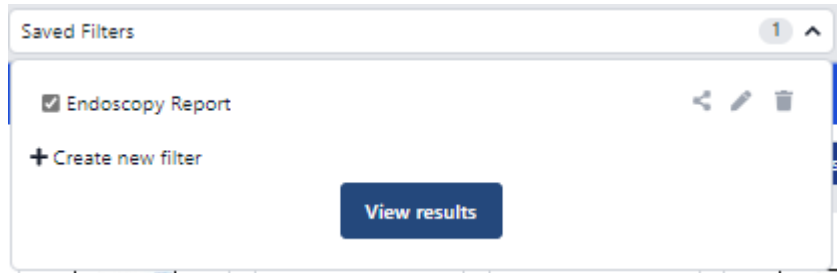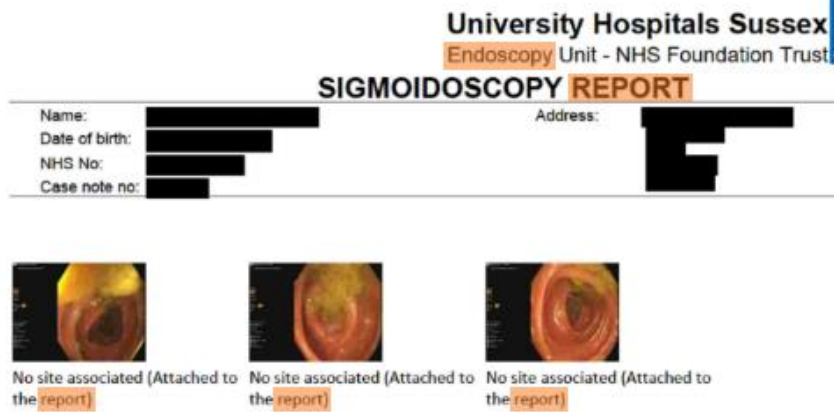|	
Click each Document Type **tickbox** that you wish to include	**Create filter** ✕ **Document type** Refine the filter by selecting one or more document types to match against. endos ✕ 4. ☐ Investigations & Procedures 4. ☑ Endoscopy Report **Text** Refine the filter by adding one or more words to search for in a document. Filter text **Filter name (required)** Filter name Cancel Save You may also wish to further filter by a keyword in the Filter Text field **Please note:** adding more than one word will mean that **both** words need to appear on a single Page for it to appear in the filter results. All Pages with a Bundle Name also are classified with a Document Type, although this cannot be seen. Therefore, sometimes you will find Page results returned from a Document Type filter that you weren't expecting until you view the Page itself.
Type into the Filter Name field, noting that if you are sharing this filter with others that it may need a clearer name	Before you proceed to the next step, check you are happy with the options selected and/or typed. **Create filter** ✕ **Document type** Refine the filter by selecting one or more document types to match against. endos ✕ 4. ☐ Investigations & Procedures 4. ☑ Endoscopy Report **Text** Refine the filter by adding one or more words to search for in a document. Endoscopy Report **Filter name (required)** Endoscopy Report Cancel Save **Please note:** selecting a Document Type is not required, you can type in a keyword instead, to filter by.

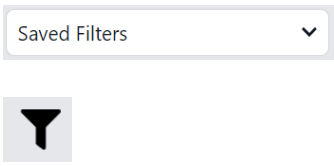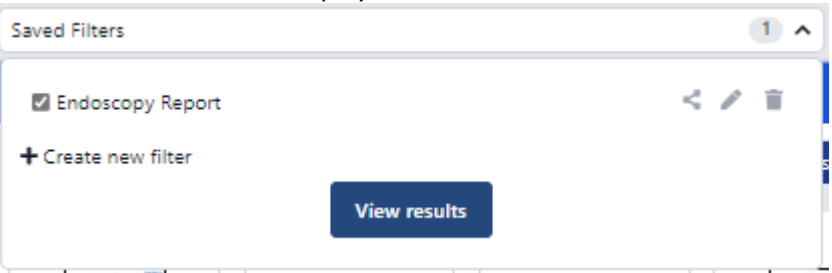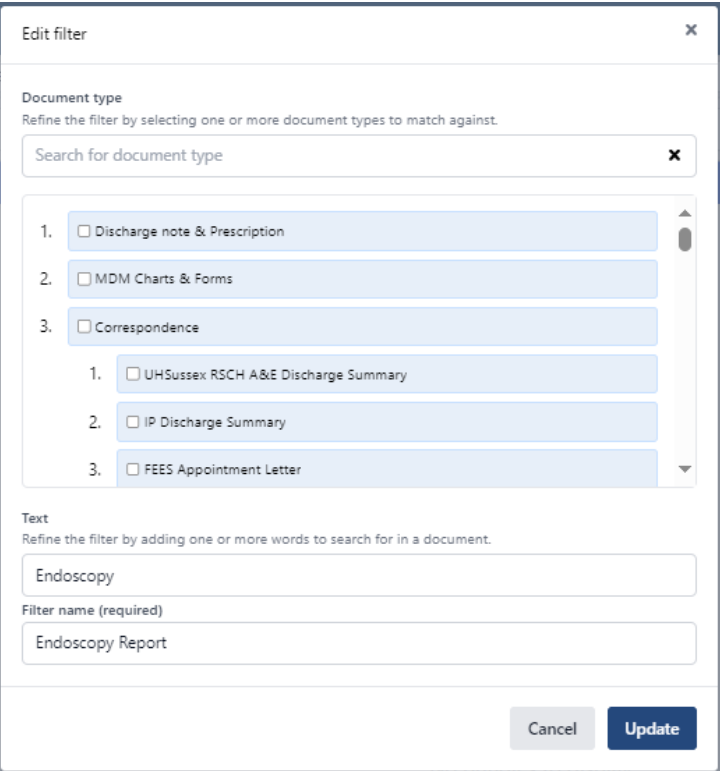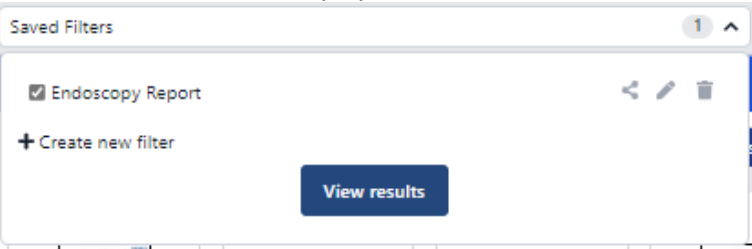| Click **Save**	It will now be listed in the Saved Filters field's menu and when clicked will instantly filter the patient's Health Record to that criteria.
	If the filter criteria matches the Page's Bundle Name or Document Type exactly, the **i** icon goes orange in the Page View.
	If text within the Page itself includes all text written in the saved filter, then those words are highlighted in orange.
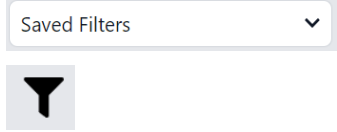
Continue over the page for Edit, Delete and Share functions.

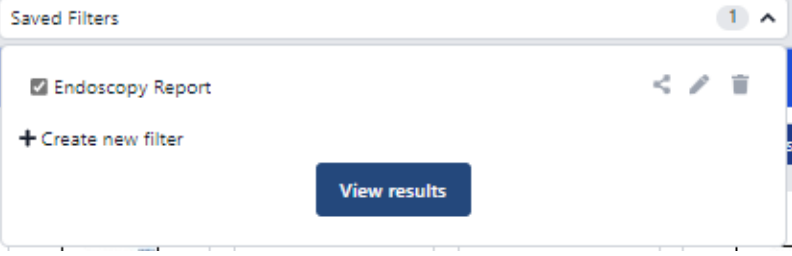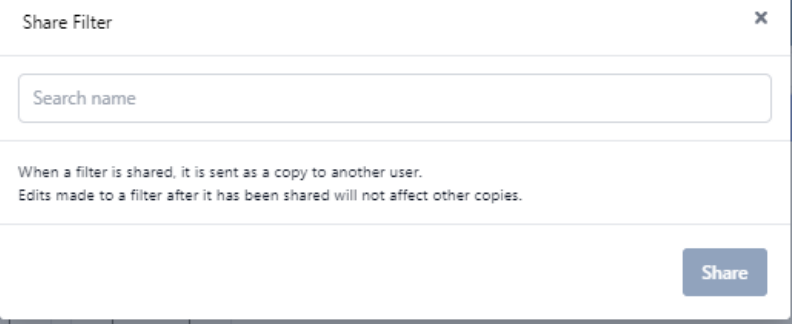| **EDIT A SAVED FILTER**	
Whilst in a patient's Health Record, click into the **Saved Filters** field at the top of the **Bundles** View , or **Funnel** icon if reduced to a sidebar Saved Filters ⌄ ▼	The **Saved Filters** menu displays: Saved Filters 1 ⌃ ☑ Endoscopy Report ⤴ ✎ 🗑 ➕ Create new filter **View results**

Click on the P**en** icon against the filter you wish to edit	The **Edit Filter** window displays:
	
	 Edit filter ✕
	
	 Document type
	 Refine the filter by selecting one or more document types to match against.
	 Search for document type ✕
	 1. ☐ Discharge note & Prescription
	 2. ☐ MDM Charts & Forms
	 3. ☐ Correspondence
	    1. ☐ UHSussex RSCH A&E Discharge Summary
	    2. ☐ IP Discharge Summary
	    3. ☐ FEES Appointment Letter
	
	 Text
	 Refine the filter by adding one or more words to search for in a document.
	 Endoscopy
	 Filter name (required)
	 Endoscopy Report
	
	 Cancel **Update**
	
	 Make changes to the Document Types selected, any keyword text recorded and/or the name of the Saved Filter.

Click **Save**	The changes have now been applied in the Saved Filters field's menu.
DELETE A SAVED FILTER	
Whilst in a patient's Health Record, click into the **Saved Filters** field at the top of the **Bundles** View, or **Funnel** icon if reduced to a sidebar	The **Saved Filters** menu displays: Saved Filters 1 ⌃ ☑ Endoscopy Report ⤴ ✎ 🗑 ➕ Create new filter **View results**

Click on the **Bin** icon against the filter you wish to edit	The **Delete Filter** window displays: Confirm ✕ Confirm you wish to delete the bundle filter Endoscopy Report Cancel Confirm
Click Confirm	The Saved Filter has now been deleted.
SHARE A SAVED FILTER	
Whilst in a patient's Health Record, click into the **Saved Filters** field at the top of the **Bundles** View, or **Funnel** icon if reduced to a sidebar Saved Filters ⌄ ▼	The **Saved Filters** menu displays: Saved Filters 1 ⌃ ☑ Endoscopy Report ⋖ ✏ 🗑 ✚ Create new filter **View results**
Click on the **Network** icon against the filter you wish to share ⋖	The **Share Filter** menu displays: Share Filter ✕ Search name When a filter is shared, it is sent as a copy to another user. Edits made to a filter after it has been shared will not affect other copies. **Share**
Type in your colleague's/colleagues' name/s into the **Search** field.	The Search Results display: Share Filter ✕ Richard Richard Ely-Harris Richard Ely-Harris Richard Gibson When a filter is shared, it is sent as a copy to another user. Edits made to a filter after it has been shared will not affect other copies. **Share** **Please note:** You can only share Saved Filters in batches of 20 users. If you need to share with more, repeat this process.

Click on each colleague	A tick appears against their name, and they appear in a "pill" above the search results:
Click **Share**	The Saved Filter has now been shared as a copy. As noted in the Share Filter window, any filters shared are now a copy of yours and therefore, where accepted, they will not be affected by any edits you make to your Saved Filter.