Solus® Clinical

Administration Guide

Version 3.15.5

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1. Introduction

The Solus Administration section is part of HD Clinical's Solus Clinical solution and provides the ability to adapt Solus to the bespoke requirements of the client. Built by technical experts and clinicians, Solus is a nationally compliant, paper-free solution with everything in one place. Solus is designed for medical, nursing and admin teams and will hold multiple departmental records in a secure and centralised source.

Solus Clinical is the next generation product from HD Clinical. The continuing evolution and growth of this product ensures the customer gets the most beneficial system, with the view to integrate other HD Clinical products into one. Solus Clinical can also be used on a Windows tablet to improve efficiency.

Solus Clinical incorporates Cardiology, Respiratory, Neurophysiology and other specialties. Please see our user guides for each of the Solus modules. These can be found on our online support hub or by request from HD Clinical's product team.

1.1. Symbols used in this guide

For ease of use this user guide also has various recurring elements and symbols:

- Routes for navigation within the software are highlighted in blue in this manual: *Home > System Settings*

Information
General information is highlighted in these boxes

Notes
Notes marked in yellow indicate possible operating errors.

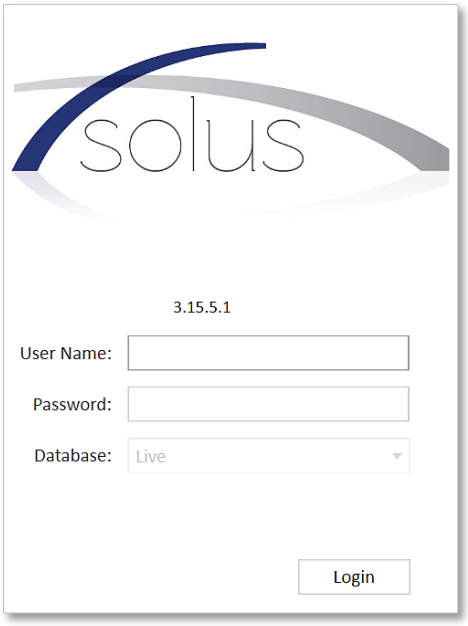
Tip
Advice on using the software is highlighted in green

Warning
Warnings marked in red must be observed, otherwise critical consequences may occur.

1.2. Logging into Solus

The URL (website address) for access to our Solus system will be supplied to you by your System Administrator along with your unique username and password.

Active Directory or Active Directory Pass
If your region, trust or hospital use an active directory or active directory pass then the user's standard username and password should be the same as their standard settings for other IT systems.

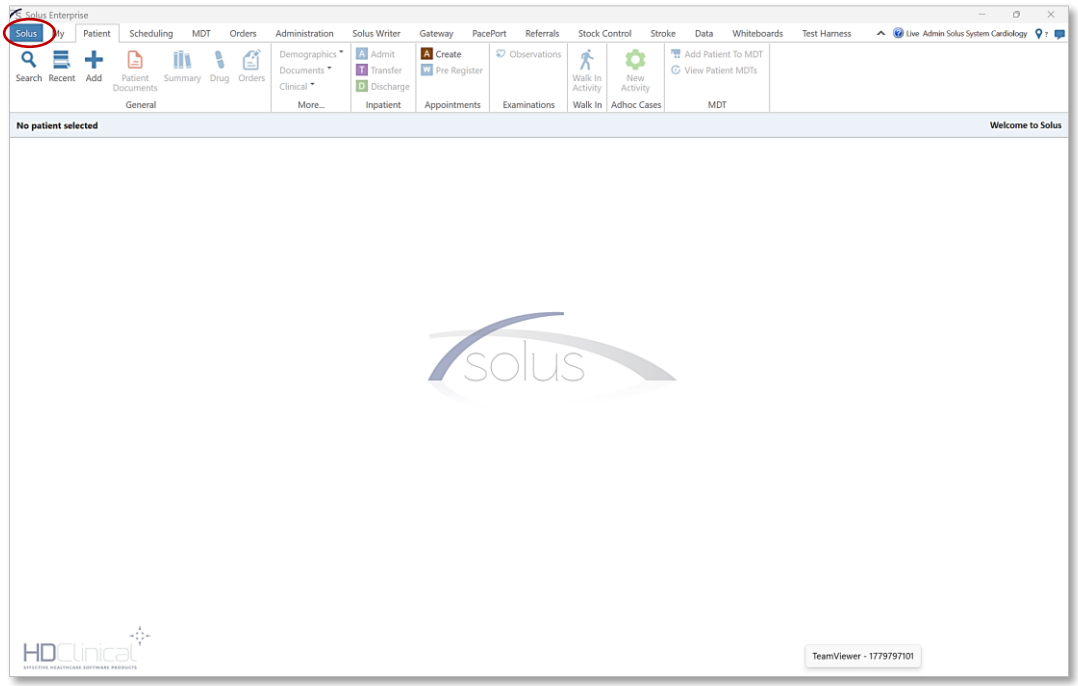


Note: Leave the database set to *Live.*

You will have been assigned a system role that will enable you to access the relevant areas of the software for you. This is a security feature enabled by your System Administrator.

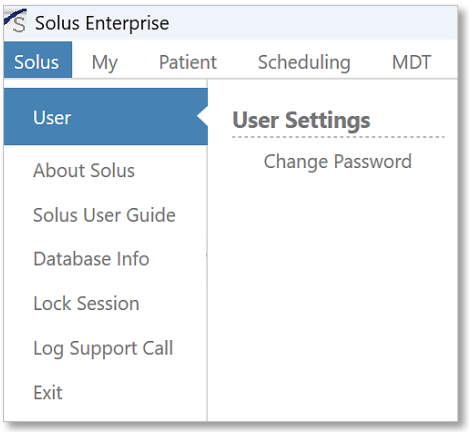
Warning
Please do not share or use anyone else's login information as this can cause auditing and permission errors.

1.3. Navigating Solus



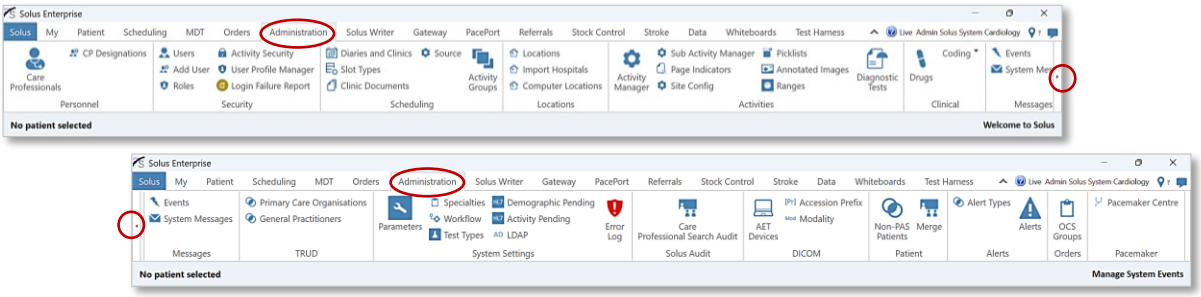
Once logged in you will see the dashboard for your hospital and modules, from here you can navigate to the area you require by selecting the required tab along the top navigation bar.

Further information about Solus can be found under the *Solus* tab as well as functions such as locking the session, logging a support call and exiting the application.



Solus will lock automatically after a period with no use, to protect the database, and will require you to re-enter your password to re-open. On logging back in Solus will re-open at the task you were last using. This can be done manually by selecting the *Lock Session* option.

1.4. Administration and System Settings



This user guide will focus on the system settings and related administration of the Solus system which can be found under the *Administration* tab on the top navigation bar and allows you to make changes which affect the use and look of Solus.

Caution
Any changes to technical settings should only be made in consultation with HD Clinical and your IT department.

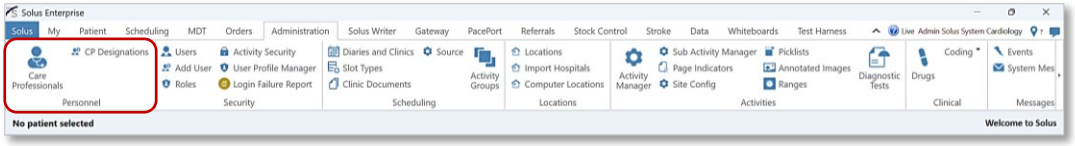
Note: To see all the functions available under the *Administration* tab please use the scroll arrows ◄ ► on the navigation bar.

From the *Administration* tab you can:

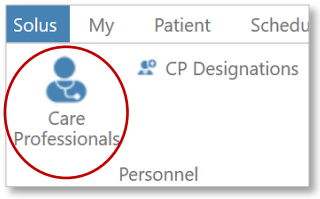
- Add users, locations, update picklists, and configure the clinical modules.
- Create care professionals and their designations and make sure that the relevant people appear in the correct dropdown lists within the clinical modules.
- Create specific locations for wards, bays and beds, even stock rooms and cabinets and shelves.
- Manage your diaries and clinics and manage your notifications so that when appointments are created a system message, e-mail or SMS message can be sent to those configured to receive the notification.
- Hide fields and pages, make fields mandatory, and add text into the information box and change the order the fields appear on a page.

This document is provided as a guide and if you have any questions or queries, please do not hesitate to contact our support team on *support@hd-clinical.com* or to request further training please talk to our products team.

2. Personnel

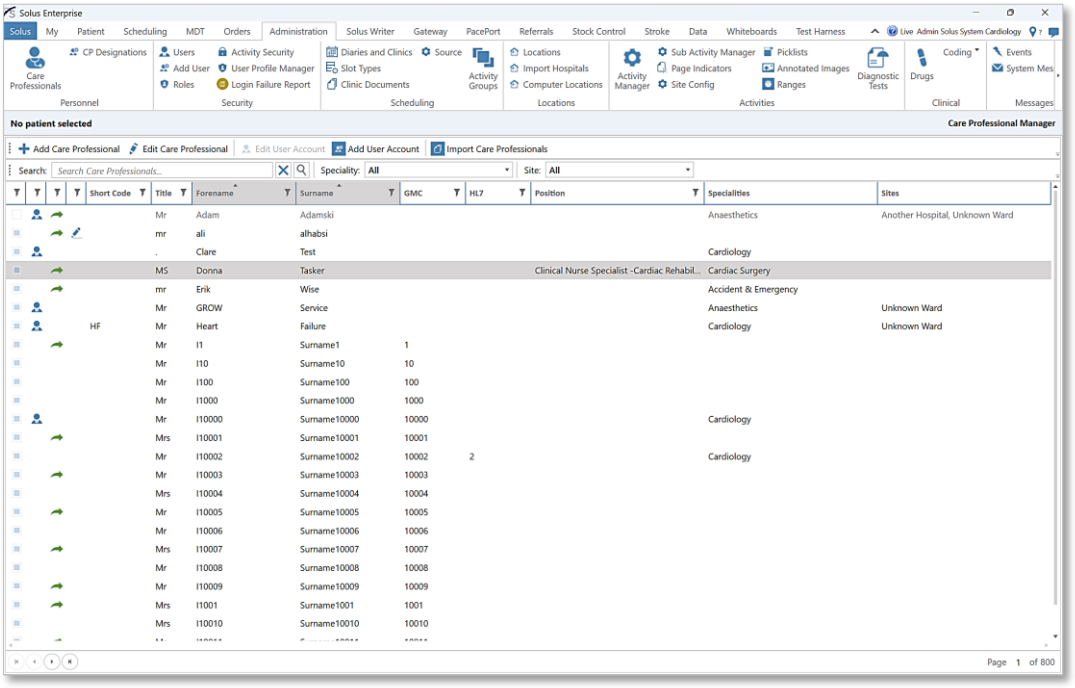


2.1. Care Professionals

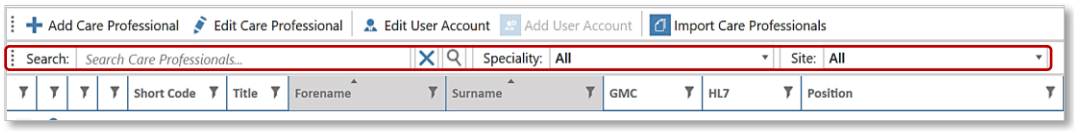


A care professional is any member of staff that can be referenced throughout Solus. A doctor, nurse, physiologist etc. The Care Professional page displays a list of all referrers and users on the system and can be found under *Administration>Personnel>Care Professionals*. This page allows the speciality of the user to be defined and what sites they work within.

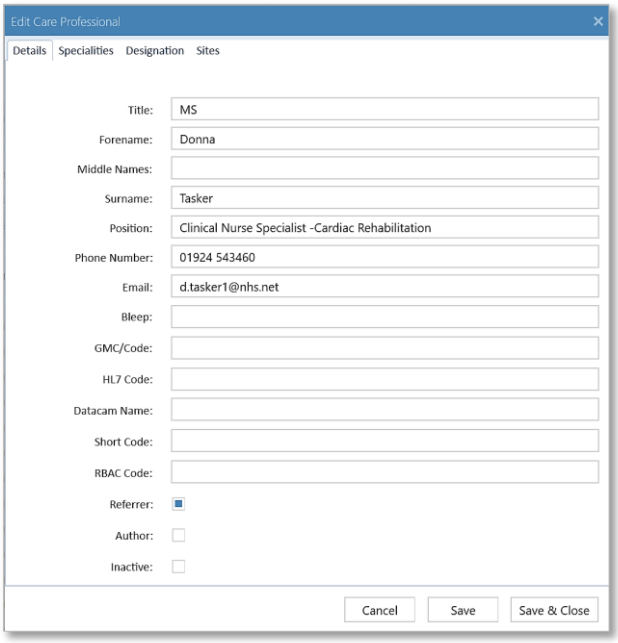
Import of Care Professionals
Any member of staff who is registered on the hospital PAS/Administration system can be imported into Solus via an HL7 file.



Icons on this page: User Referrer Author



- To search for a care professional use the search boxes at the top of the page.
- To view a care professional's details, ***double-click*** the required care professional. This will bring up a pop-up screen where the person's details, specialties, designation and sites can be viewed and edited. This can also be accessed by selecting the *Edit Care Professional* option at the top of the screen



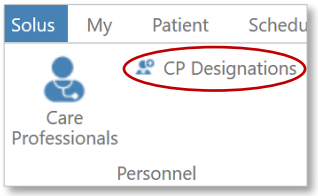
Overwritten Data
Any detail left blank after a data import of care professionals can be entered manually and the imported information can also be edited in Solus. However, if another import is run, any information that has been changed will be overwritten.

- After creating or editing the staff member you have the option of selecting *Cancel*, *Save*, or *Save & Close*.
- *Cancel* – Anything created or edited will be lost.
- *Save* – The information will be saved and the pop-up will stay open. **Note:** If you are creating a new care professional, to enable the designations the record must be saved first.
- *Save & Close* – Will save the record and close the pop-up.
- To add a care professional, select the *Add Care Professional* option at the top of the page.
- A similar pop-up screen to the edit option will appear. Fill in the information under each tab as required.

- *Details* – The information entered here will decide how the name is displayed within the clinical modules. The minimum detail required is title, forename and surname.
    - To indicate if a care professional is a *Referrer, Author* or to make them Inactive use the ***toggle on/off*** boxes on the *Details* tab.
- *Specialties* – The drop-down options for specialties can be changed under the system settings which will be covered later in this guide.
- *Designation* – The Designation tab will allow you to attach a role to the member of staff like Consultant Cardiologist, Cardiac Physiologist, Scrub Nurse, Radiographer etc. These designations can be customised in the *CP Designations* page. The idea of designations is that throughout Solus you can select specific members of staff in dropdowns so that only the members of staff associated with that area will appear in the list.
- *Sites* – To edit the list of locations on the drop-down menu please see Locations. This will be covered later in this guide.

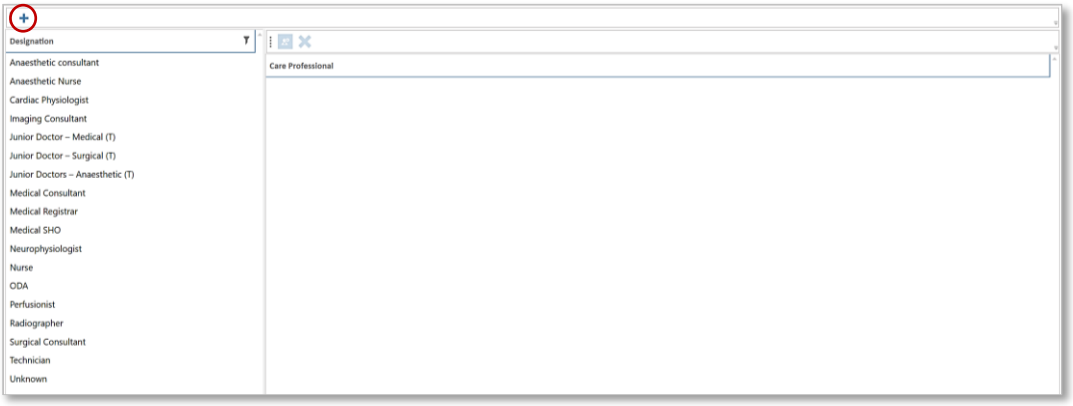
GMC/Code
If the care professional has a GMC number and it is entered in the *GMC/Code* field on the *details tab*, this will then appear in any national data sets where it is required.

2.2. CP Designations

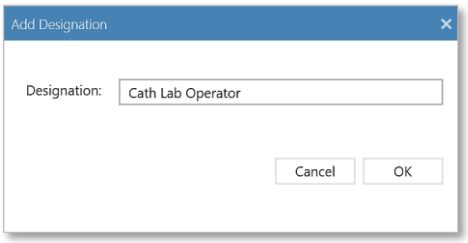


CP Designations are roles which can be assigned to care professionals. These roles can then be assigned to clinical modules so only those care professionals relative to the field will be displayed.

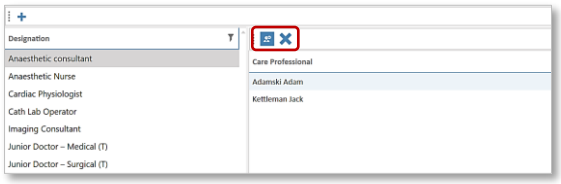
Solus has a default list of designations, but bespoke ones can be added and assigned to a care professional. For example, if all the care professionals in your cath lab are able to do all the procedures it may be sufficient to use the designation of 'Cath Lab Operator'. Alternatively, if each care professional conducts different procedures, you could set up a designation for each procedure such as 'Cath Operator', 'PCI Operator', 'PPM Operator' and 'ICD Operator' with the relevant role assigned to the appropriate care professional.



- To add a new CP Designation, **click** the *Add* button. This will bring up a new pop-up screen.

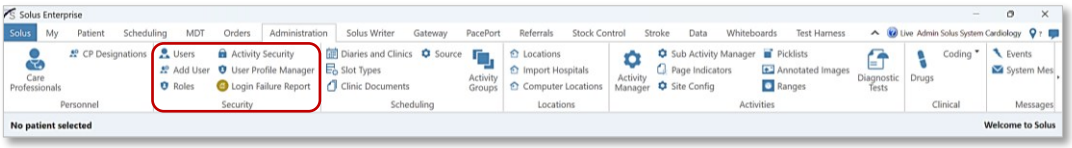


- Add the new designation and **click** *OK*. This will now be added to the list of CP Designations.
- To add care professionals to a designation, select the designation and a list of care professionals with that designation will appear in the right-hand screen.



- This list can now be edited using the *Add Care Professional* and *Delete* buttons at the top of the right-hand screen.

3. Security



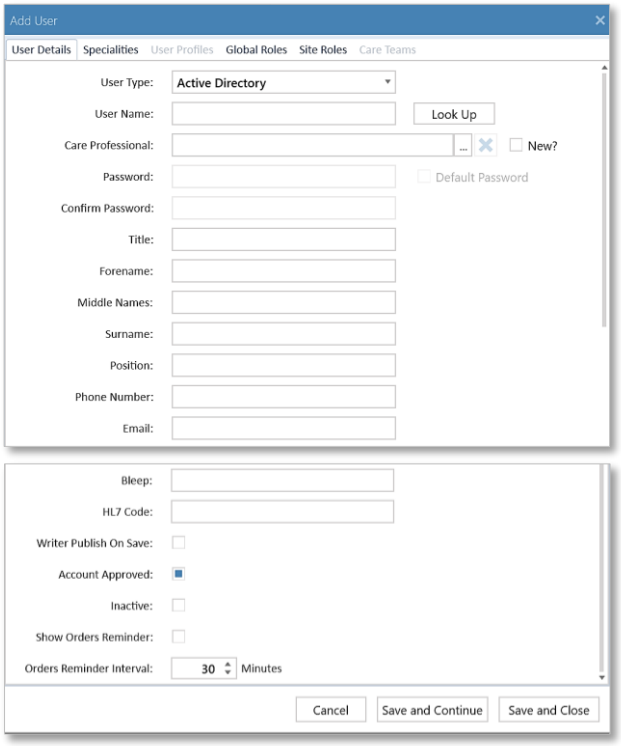
3.1. Create/Add User

Active Directory or Standalone Users
Before users are created it must be decided whether to use an Active Directory or Standalone Users.

There are two ways to add a user in Solus:

- Going to *Administration>Security>Add Users,* or
- Navigating to *Administration>Security>Users* and using the **+** *Add* button at the top of the page.

Both options navigate to the same pop-up screen.

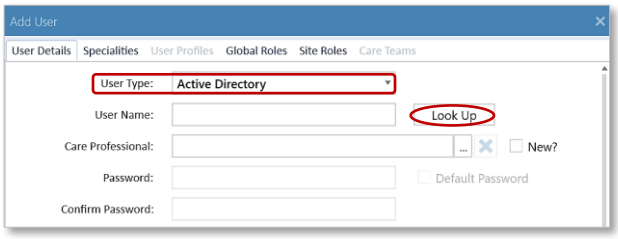


- As a minimum the title, forename, surname, and a default specialty need to be completed before you can save.
- The *HL7 Code* can be the user's GMC number.
- *Writer Publish on Save* – is a setting that allows users to automatically have their Solus Writer document published when they are saved.
- *Account Approved* – if checked then the account is active and usable.

- *Inactive* – check this box to disable the account.
- *Show Orders Reminder* – If this box is checked a message will appear informing the user that they either have 'Pending internal orders' or 'Automated orders' as indicated by the pop-up.
- *Orders Reminder Interval* – allows you to choose the time interval between appearances of the messages.

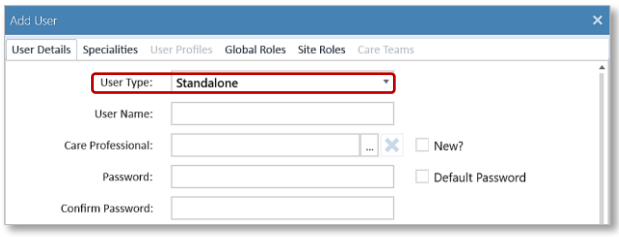
3.1.1. Add an Active Directory User

Active Directory Settings
If using an Active Directory for users a link will be entered in LDAP to enable any users on the hospital system to have a Solus account. To set this up please see *Administration>System Settings>LPAD.*



- Select *Active Directory* from the dropdown menu in the *User Type* field.
- Enter the active directory *User Name* already allocated and ***click*** *Look Up*.
- All the user's information stored on the system should automatically be pulled across and shown in the relevant fields.
- If the user already has a Care Professional record on Solus, enter the name in the search box and ***click*** the *… Search* button If they do not have a Care Professional record, ***click*** the *New?* box.
- Once the required information is entered on this tab, go to the *Specialties* tab and add the user's specialty ***click*** *Save and Continue*, this will leave the record open to allow you to continue to add roles.

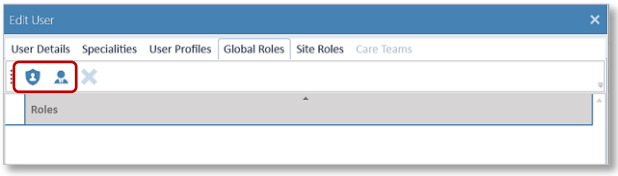
3.1.2. Add a Standalone User



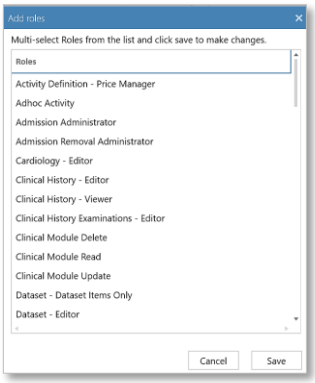
- Select *Standalone* from the dropdown menu in the *User Type* field.
- Enter a unique *User Name* and *Password*.
- If the user already has a Care Professional record on Solus, enter the name in the search box and ***click*** the *… Search* button. If they do not have a Care Professional record, ***click*** the *New?* box.

- Once the rest of the required information is entered on this tab, go to the *Specialties* tab and add the user's specialty ***click*** *Save and Continue*, this will leave the record open to allow you to continue to add roles.

3.1.3. Adding Roles to a User

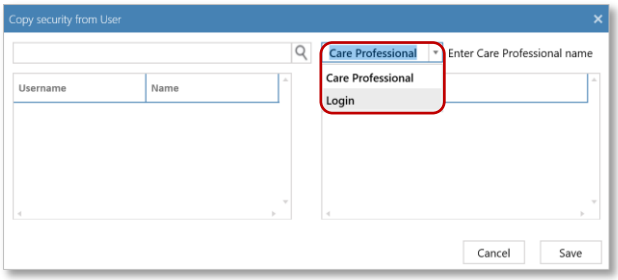


- To add Global Roles to a user, ***click*** on the *Global Roles* tab then ***click*** the *Add user to roles* button and select the required roles from the pop-up screen and ***click*** *Save*.

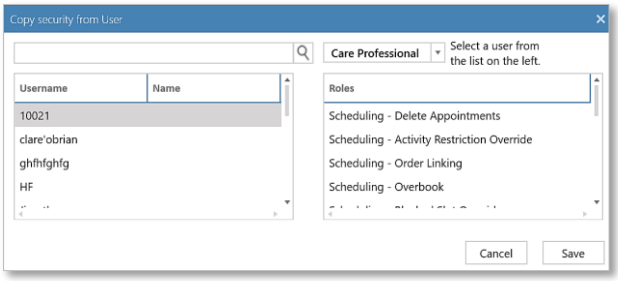


OR

- ***Click*** the *Copy security from user* button. Type in the name and indicate if this is a *Care Professional* or *Login* (User Name) then ***click*** *Search.*

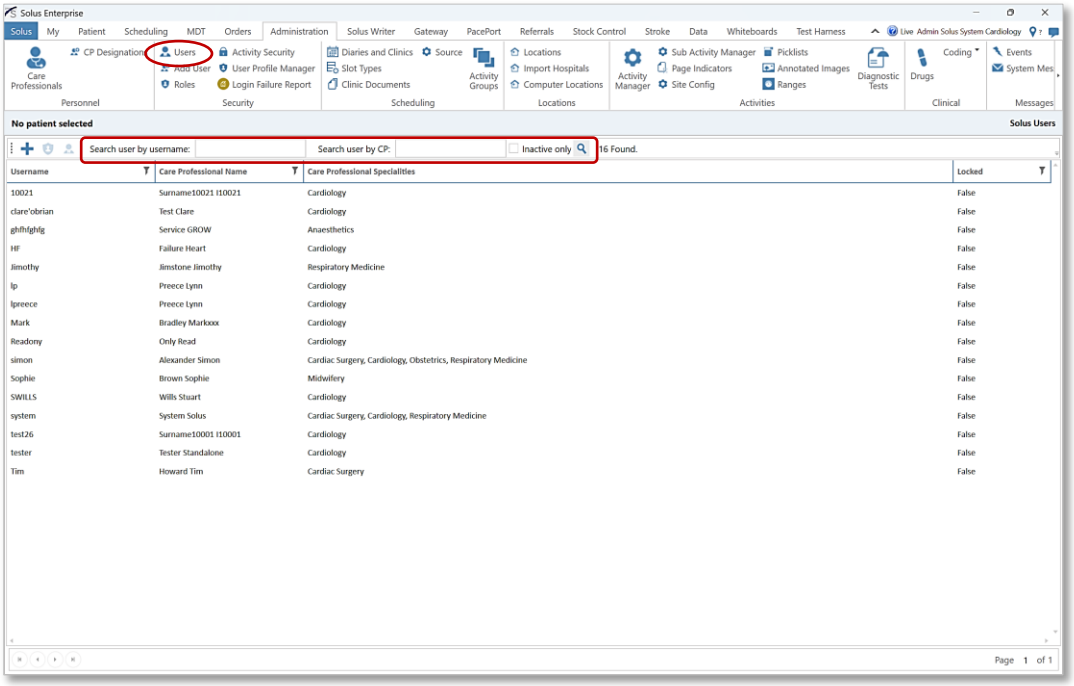


- Select the required user from the list and all the roles they have will be shown on the right-hand side of the screen, ***click*** *Save*



Locations
Before the user can login, they will need to have a site/location; to add this go to *Administration>Personnel>Care Professionals* and edit the user's details.

3.2. Users



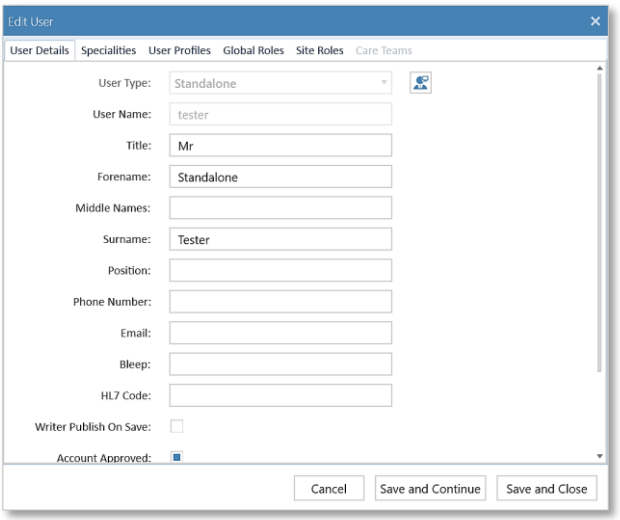
Users can be found at *Administration>Security>Users* and all the users set up with access to Solus can be accessed on this user page. From here new users can be created, security roles assigned, and users' passwords reset (providing they are a standalone user).

3.2.1. Search or Filter Users

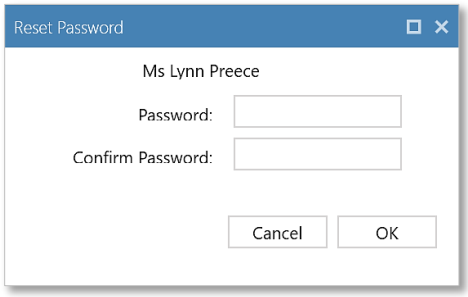
- To search users, use the *Search Boxes* at the top of the page.
- To see a full list of all users leave the search boxes clear and ***click*** the *Search* button.
- To filter a list of users, use the *Filter* options at the top of each column.

3.2.2. Edit User

- To edit a user, ***double-click*** on their name, this will open their user record in a pop-up screen.
- Amend their details as required and ***click*** *Save and Close* or *Save and Continue* if you need to edit their roles (see 3.1.3 above).

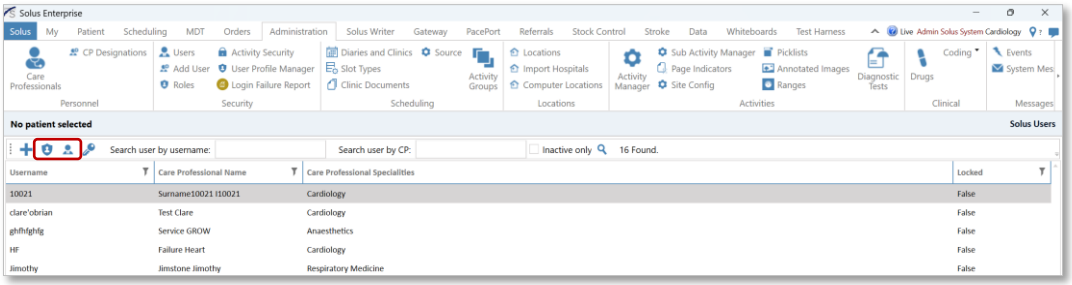


3.2.3. Change Password



- If the user is a standalone account and has not been set up via the Active Directory the password can be changed on Solus by ***clicking*** on their name and selecting the *Reset Password* button.
- A pop-up screen will appear, enter the new password and confirm the password, then click *OK*

3.2.4. Edit a User's Roles

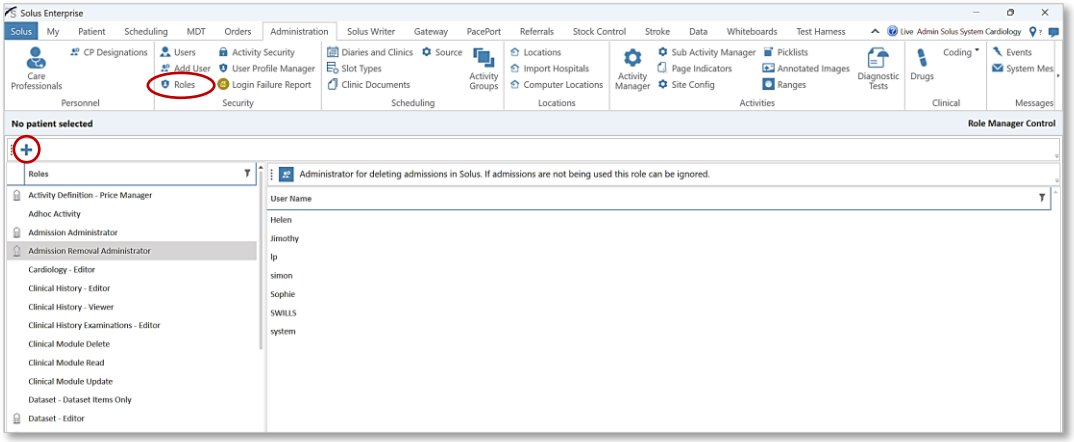


- To edit a user's roles, ***click*** the *Add user to roles* button and select the required roles from the pop-up screen and ***click*** *Save*.

OR

- ***Click*** the *Copy security from user* button and follow the instructions in 3.1.3 above.

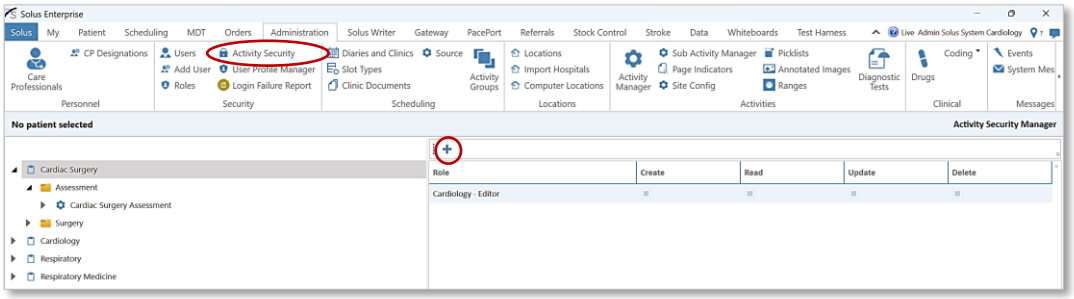
3.3. Roles



Roles can be found at *Administration>Security>Roles*. Solus has a pre-set list of roles; these can be identified by the padlock symbol and cannot be edited.

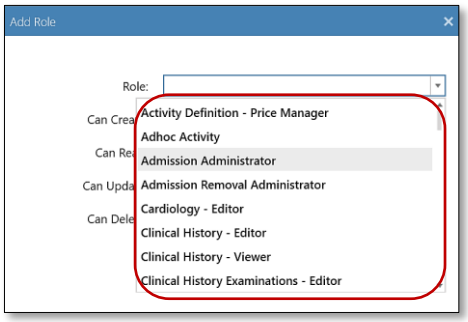
- To view the user assigned to a role ***click*** the required role from the left-hand column and a list of assigned users will appear in the right-hand column.
- To add additional roles, use the **+** *Add* button.
- To edit an added role, ***double-click*** the required role and edit as needed, then ***click*** *Save*.

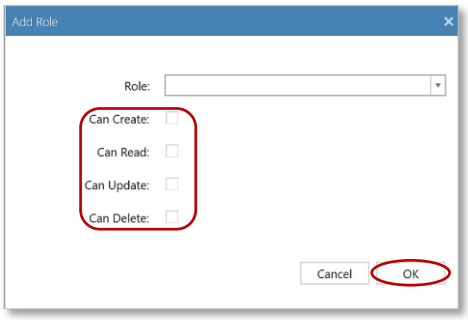
3.4. Activity Security



Activity Security can be found at *Administration>Security>Activity Security*. This function allows added roles to be customised.

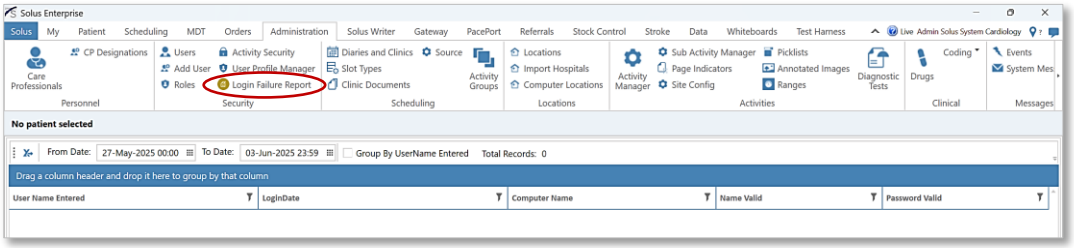
- Select the specialty or sub-activity from the left-hand column. If a role has already been given access to this, it will appear in the right-hand column.
- To add role access rights to a specialty or sub-activity. Select the activity and then ***click*** the ***+ Add*** button at the top of the right-hand column. This will bring up a new pop-up screen.
- Select the role from the dropdown menu ***toggle on/off*** the access rights needed, then ***click*** *OK*.





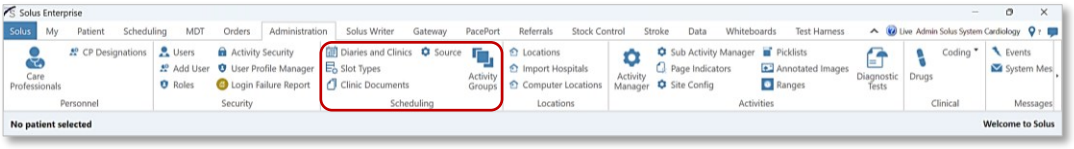
3.5. User Profile Manager – Not in use

3.6. Login Failure Report



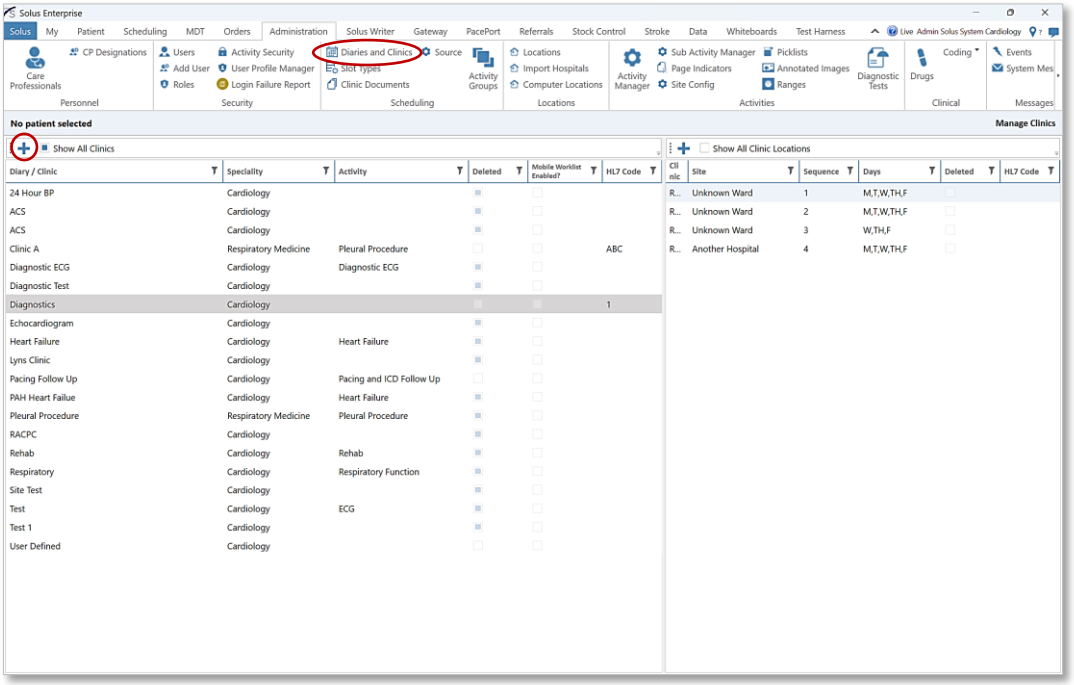
The Login Failure Report can be found at *Administration>Security>Login Failure Report*. This report shows users that have been unsuccessful logging into Solus and shows whether it was the username, password or a combination of the two that was incorrect. The report can be filtered to show activity on a specific *Date* range or by *User Name*, *Computer Name* etc...

4. Scheduling



Setting up Scheduling
The settings for this section are dependent on the Solus modules adopted, the type of activities carried out, room availability, how appointments are dealt with and where appointment letters are processed, this will be individual to the hospital or trust. The information here is an overview of the functions in this section only. If you are new to the system your product trainer will help support you with training and set-up advice for this as part of the HD Clinical initialisation process.

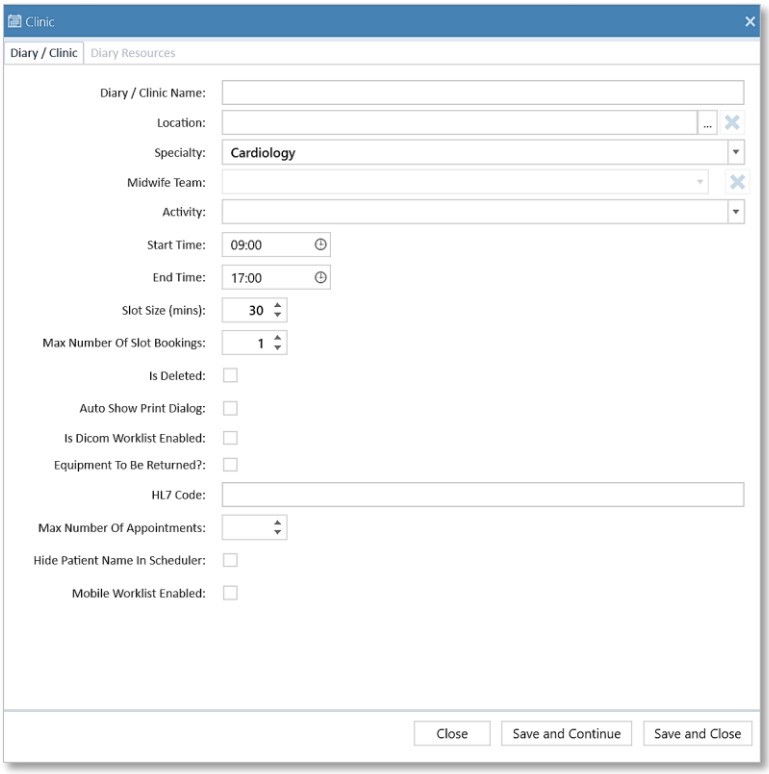
4.1. Diaries and Clinics



Linked Settings
Before setting up a new diary or clinic, the location must be configured to carry out the required activities (to do this see *Administration>Activities>Site Config*). It is also useful to have preset the *Activity Groups* and *Slot Types*.

Both diaries and clinics can be set up with diary resources, booking forms, templates and associated documents. If linked to the PAS system, the diaries and clinics will automatically be imported and appear in this list. By default, only active clinics will be listed. To see deleted options as well ***toggle on*** the *Show All Clinics* box.

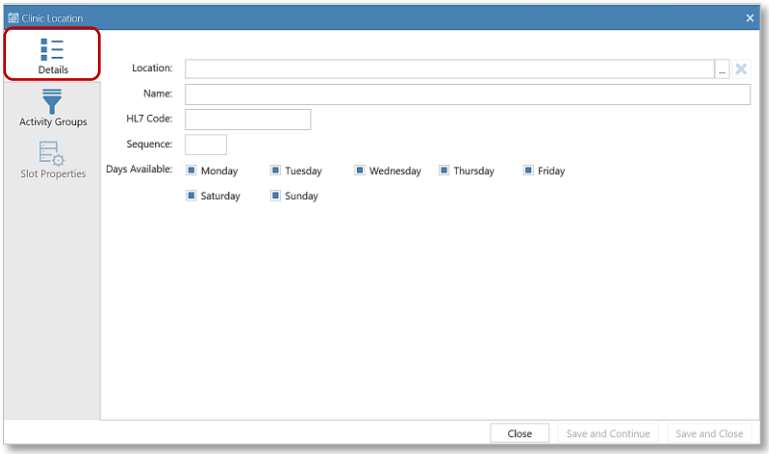
- To add a diary/clinic, click on the **+** *Add* button at top left of the page, this will bring up a pop-up screen.



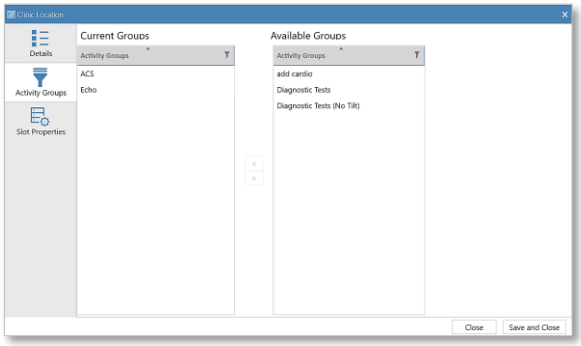
- Enter the diary/clinic details. **Note:** Not all the details need to be entered at this point. To save the clinic, ***click*** *Save and Close*. The diary/clinic is created and linked to an activity (if required). To add a *Diary Resource* ***click*** *Save and Continue* and this will take you directly to the *Diary Resources* tab.

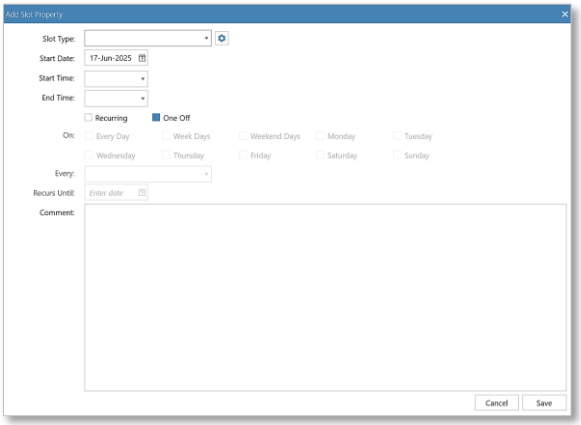
Diary Resource
All diaries or clinics must have a diary resource attached to allow the scheduling to take place. These resources can be general resources or locations.

- To add a diary resource from the main screen, select the required diary or clinic and ***click*** **+** *Add* button, or from the main screen select on the **+** *Add* button at top right of the page.

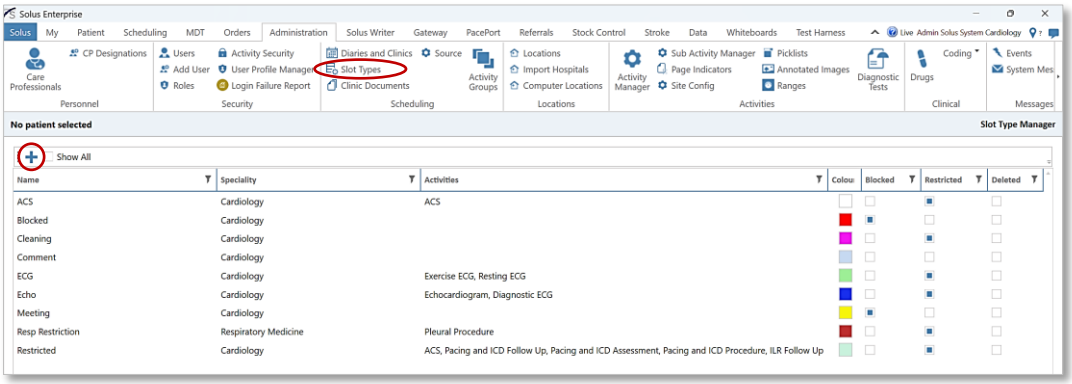


- On the *Details* option you can select a *Location* by ***clicking ...*** to see the dropdown list of locations or enter the *Name* of the resource.
- When this information is complete select *Save and Close*.
- To add or remove *Activity Groups* and *Slot Properties* ***double-click*** the required *Diary Resource* form the right-hand column and select the required tab on the left of the pop-up screen.



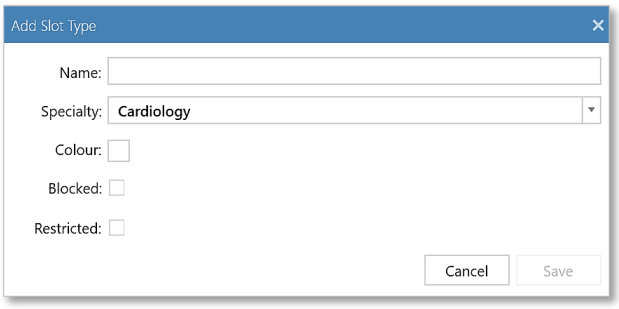


4.2. Slot Types



The *Slot Types* section is where restrictions, blocks and comments are added so that they can be added into a diary.

- To add a slot type, ***click*** the *+ Add button* at the top of the page.
- Enter the required information and ***click*** *OK*.
- To edit a slot type, ***double-click*** the slot type and edit as required.

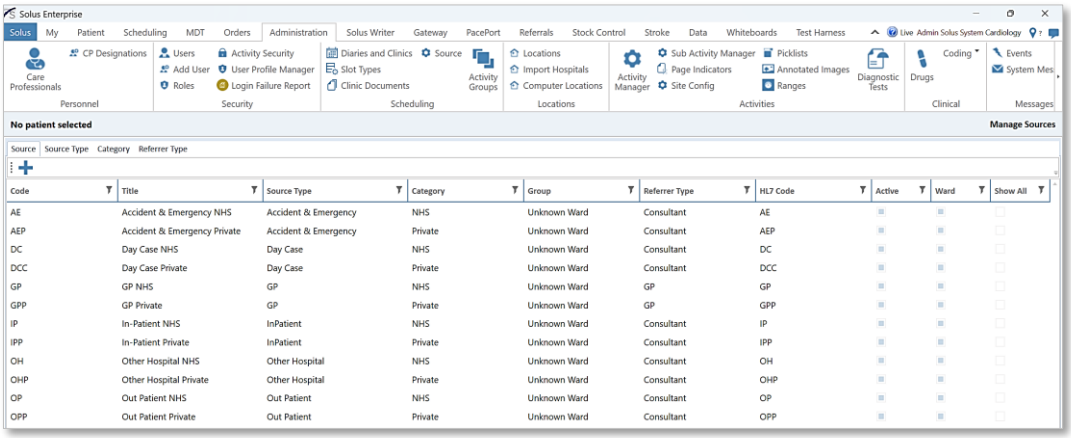


4.3. Clinic Documents

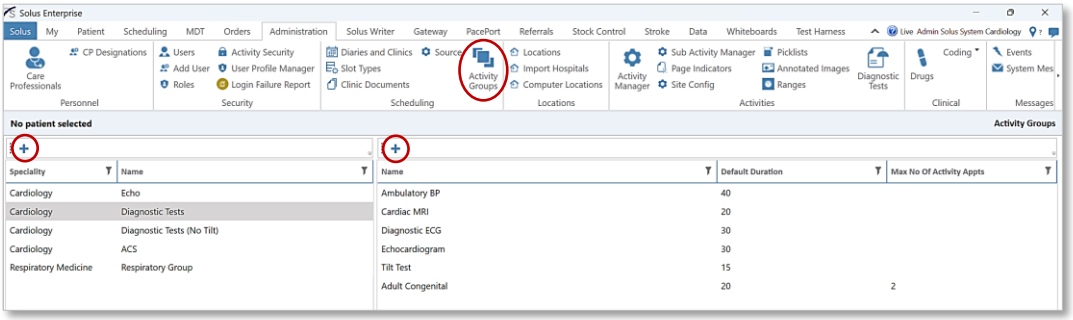
In this section documents can be added and assigned to a clinic/diary. This allows a static document to be attached to different statuses of an appointment. For example, when an appointment is booked, a letter is sent to the patient with the booking details. With this letter, an information sheet is sent giving default instructions for the appointment.

4.4. Source

The Source page shows all the Source names that are available when a waiting list entry is added, or an appointment is booked.

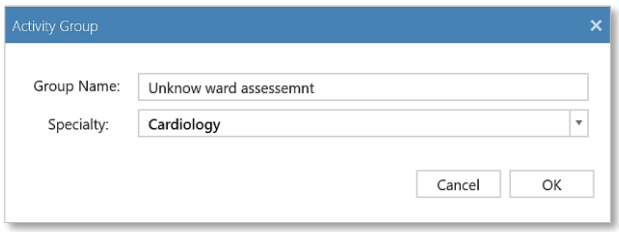


4.5. Activity Groups

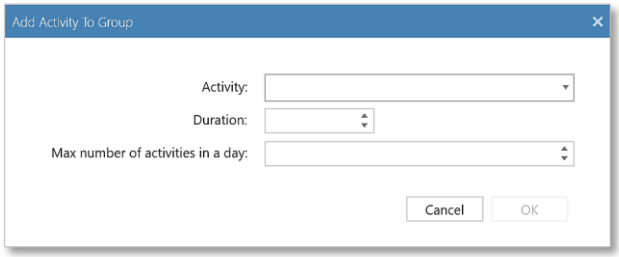


The *Activity Groups* page is where groups of activities are created so that they can be booked into clinics.

- To add a activity group, ***click*** the *+ Add button* at the top of the left-hand screen. A new pop-up will appear. Enter the *Group Name* and the *Speciality* and ***click*** *OK*.

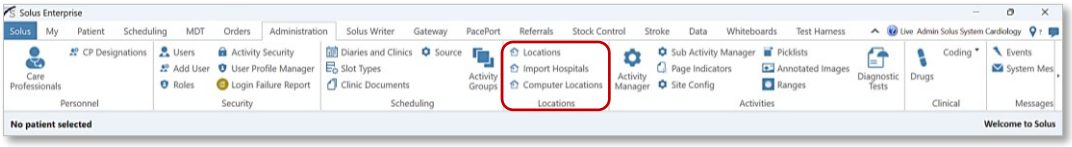


- To populate the activities within this group, ***click*** the *+ Add button* select the required activity from the dropdown menu, enter a *Duration* for this activity and ***click*** *OK*.



- Repeat this until all the activities within this group are listed in the right-hand screen.
- To edit a group activity or an activity within this group, ***double-click*** the item and edit as required.

5. Locations



5.1. Locations

Locations can be found at *Administration>Locations>Locations*. Locations contains all hospitals throughout the country.

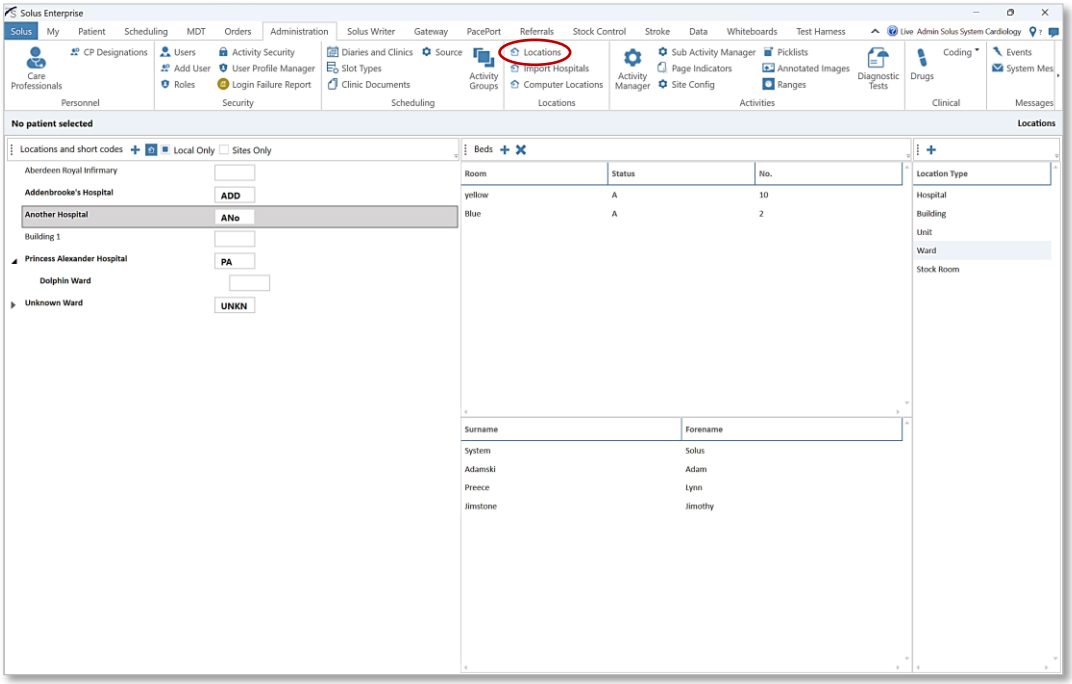
Local Locations
Local locations (inc. wards) will be imported into Solus from the trusts' PAS/EPR system and marked as local.

When you first open the *Locations* page, locally selected hospitals appear in a tree view with the hospital at the top of the tree. By expanding the view it can filter down to child locations such as wards, rooms etc. in the left-hand column.

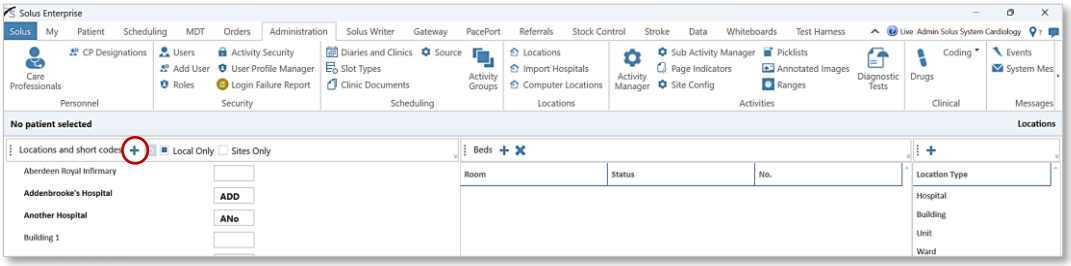
To see all locations ***toggle off*** the *Local Only* box at the top of the screen.

In the middle column you should be able to see the available beds (when a location is selected) and any users associated with that site at the bottom of this column.

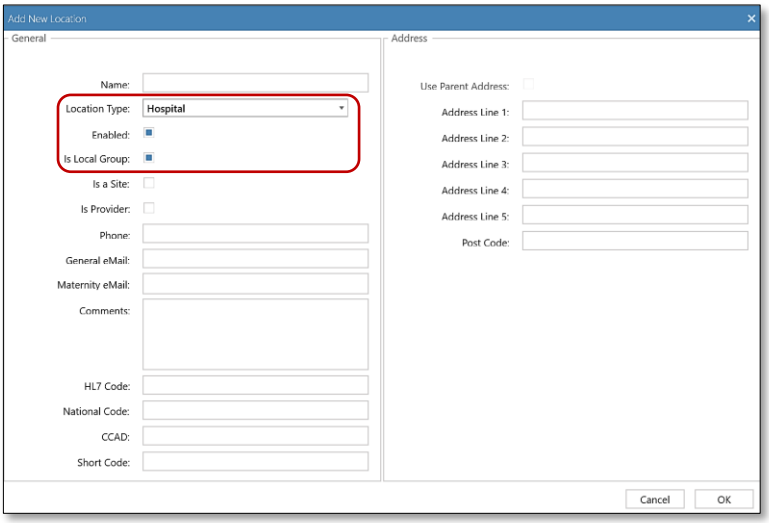
Then in the right-hand screen you should be able to see the location types.



5.1.1. Add Location

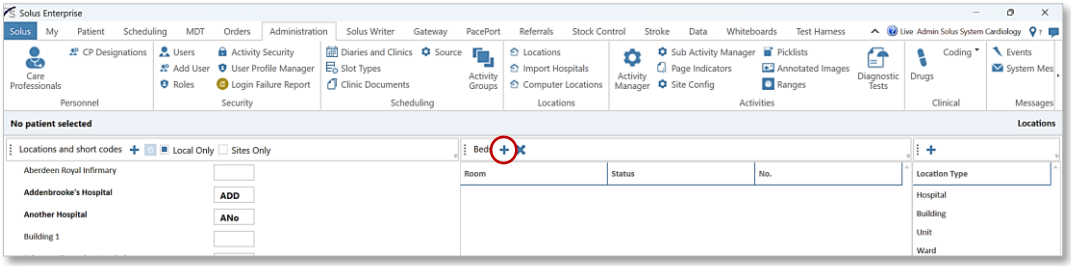


- To add a new hospital location (this is also referred to as the parent location), ***click*** the **+** *Add* button. This will bring up a new pop-up screen.



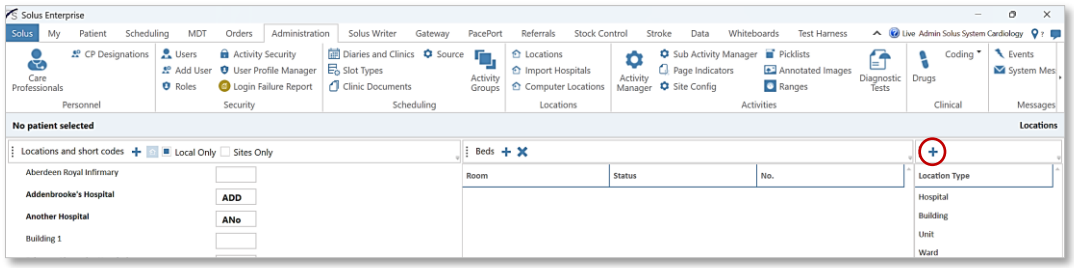
- Select *Hospital* form the *Location Type* and ensure *Enabled* and *Is Local Group* are ***toggled on***.
- A unique *HL7 code* will need to be entered for each location
- Fill in the rest of the fields with as much information as possible, then ***click*** *OK.*
- To add a child location, e.g. a Ward within the hospital, select the parent location and ***click*** the  *Add Child Location* button and complete the details as above except use one of the child *Location Type* options from the dropdown menu.

5.1.2. Beds



- Beds can be assigned to a location such as a ward. Select the location in the right-hand column and ***click*** the **+** *Add button* in the middle column.
- Enter the room, status and number of beds.

5.1.3. Location Types

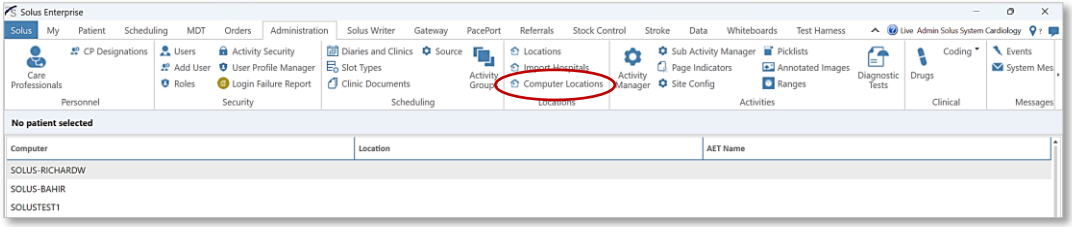


- Location types can be manually added to give a more detailed description of the location. ***Click*** the ***+*** *Add button* in the right-hand column.
- Enter the name and ***click*** *OK*.
- To edit a location type, ***double-click*** the location in the right-hand column and edit as required.

5.2. Import Hospitals

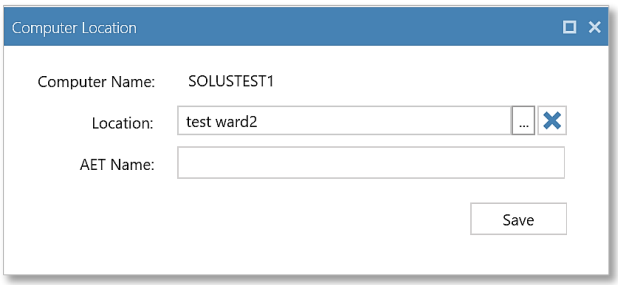
This section is used by the HL7 team at HD Clinical. It is HD Clinical's way of bulk importing hospital names along with the CCAD code.

5.3. Computer Locations

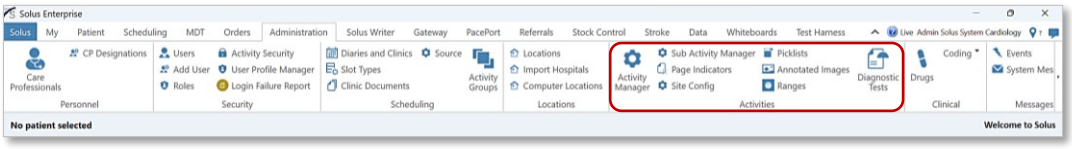


Under *Computer Locations* each computer on the network can be found and the location of the PC entered so a computer can be assigned to a specific room.

- Select the required computer and ***double-click***, this will bring up a new pop-up screen.
- Enter the location and AET Name (if required) and ***click*** *Save*.



6. Activities



Initial setup
The settings for this section are dependent on the Solus modules adopted and the type of activities carried out. Many of the activities will have been pre-set for you as part of the setup process. If you are new to the system your product trainer will help setup on this as part of the HD Clinical initialisation process. To add new activities please talk to our product team to find out more.

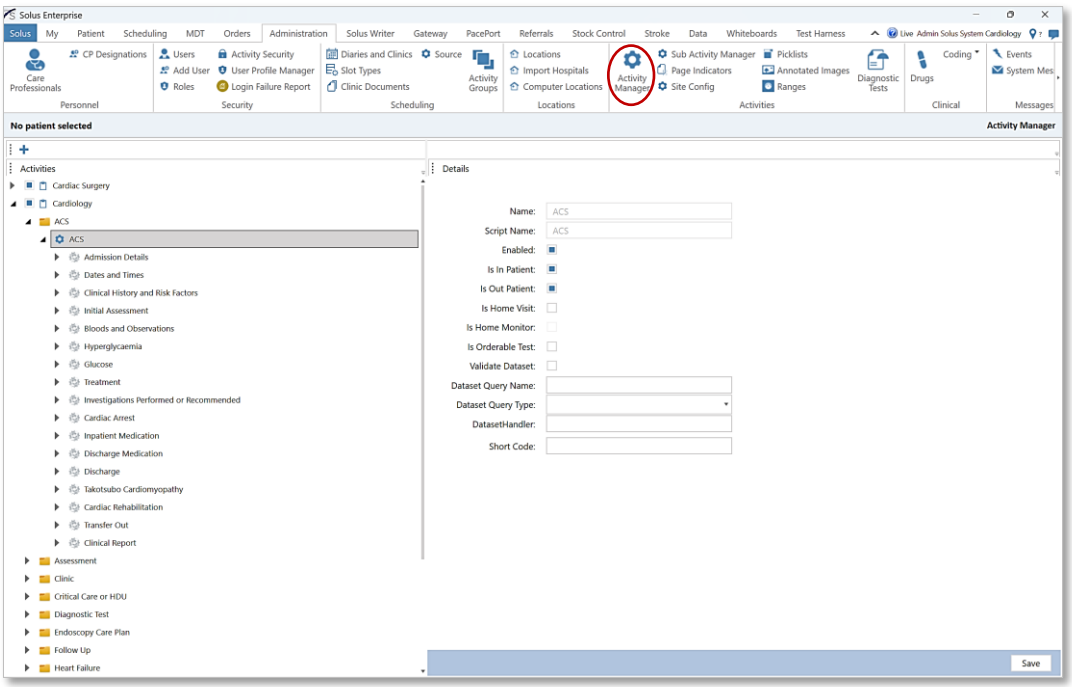
6.1. Activity Manager

Activity Manager is where the look and feel of the clinical module can be configured.

By ***clicking*** on ◢ to the left of the specialty the list will expand into a tree view, showing folders containing the module groups, the modules, the pages within the module and then fields within the page on the module.

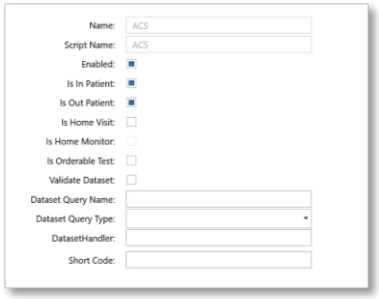
Save
Before moving on to the next module, page or field ***click*** *Save* to save any changes made.

Modules:



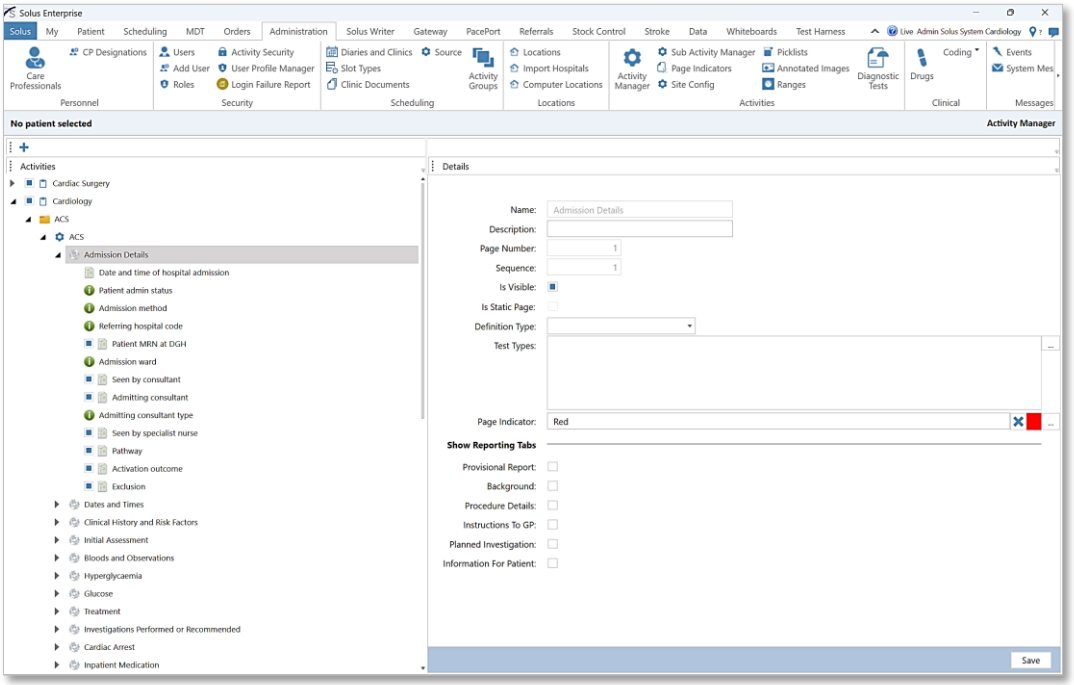
For modules you can fill in or toggle on/off the boxes as required to configure the information, visibility, and patient availability. For example in this instance:

- *Enabled* is on = module is visible.
- *Is In Patient* is on = activity is available to in patients.
- *Is Out Patient* is on = activity is available to out patients.
- *Is Home Visit* is off = activity is not available for home visits.
- *Is Orderable Test* is off = activity is not available as an orderable test.
- *Validate Dataset* is off = not active.



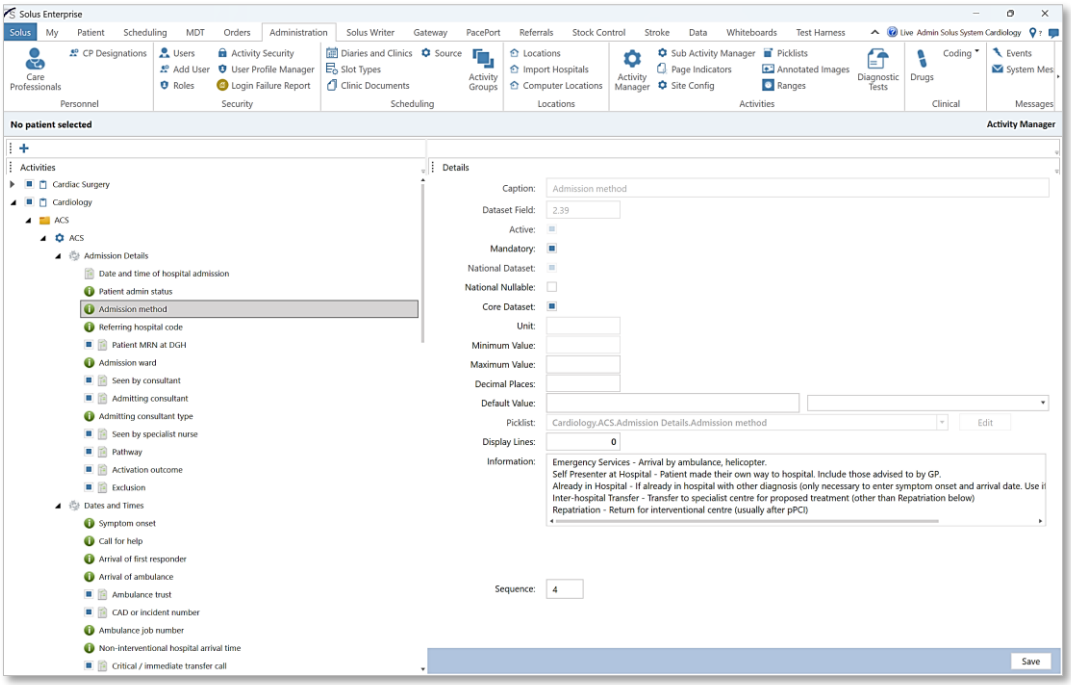
If you drill down further into the module to look at pages and field information, you can configure the page order and visible fields in a similar way.

Pages:



Note: At the page level you can give the page a *Page Indicator* colour to make it easier to identify its purpose (see below for more information on *Page Indicators*).

Fields:



The field information will depend on the type of field but as above the order they appear (*Sequence*), if the field is active, if the field is *Mandatory*, if the data is required as a *National Dataset* etc can be set for each field.

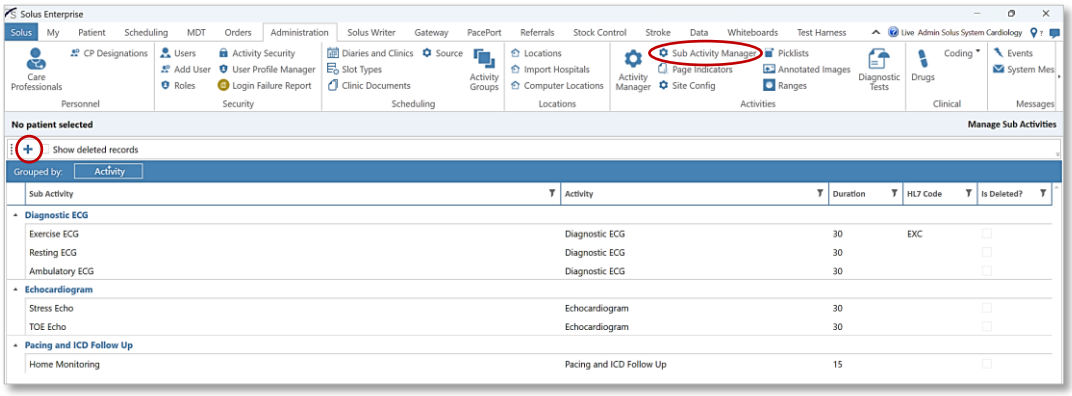
Standard information types for fields in Solus:

Caption	Name of the field.
Dataset field	If the field is a dataset, the dataset value entered here will be displayed when you hover over the green icon.
Care Professional Designation	If the field refers to a Care Professional the designation button will be available to select and attach a designation.
Active	If this is ***toggled on*** the field will appear on the page.
Mandatory	If this is ***toggled on*** the data required is mandatory on the page. This will display next to the field on the page.
National Dataset	If this is ***toggled on*** the data is required as part of the National Dataset. This will display next to the field on the page.
Minimum Value	Minimum value that can be entered – Applies to number fields only.
Maximum Value	Maximum value that can be entered – Applies to number fields only.
Decimal Places	Number of decimal places displayed – Applies to number fields only.
Default Value	A value can be entered so when the page is first loaded this will automatically be entered on the page (this can save time when filling in reports).
Picklist	Name of the picklist being referenced – Applies to picklist fields only (see below for more information on *Picklists*).
Display Lines	The number of lines which are displayed for a text field – this defaults to 5.
Information	Details can be entered as guidance for a field and displayed when the user is entering data. To see this the user can hover over the icon and the text entered here will be displayed.
Sequence	The order the field appears on the page.

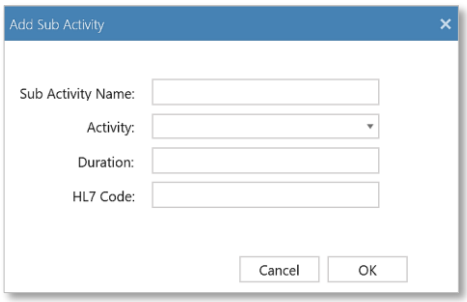
6.2. Sub Activity Manager

Sub activities are a more descriptive level to describe an activity and link to the main module. These are mainly for use in scheduling.

For example, Pacing and ICD Procedure is the module but the activity itself may be a box change, a lead revision etc.

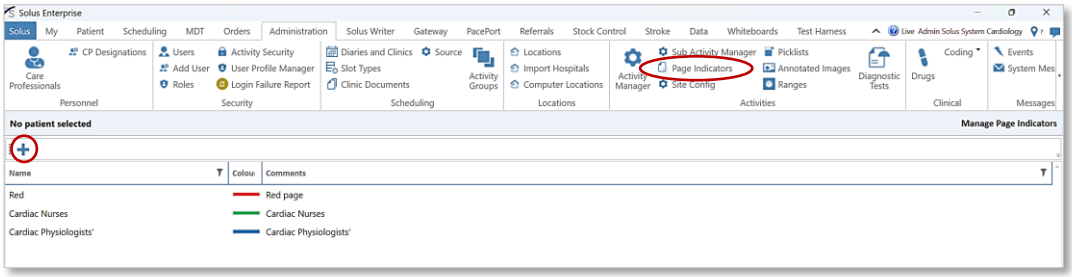


- To add a sub activity, ***click*** the *+ Add* button to open a pop up screen.
- Enter the required information and ***click*** *OK*.
- This will then appear as an option when scheduling an appointment in a diary or clinic.



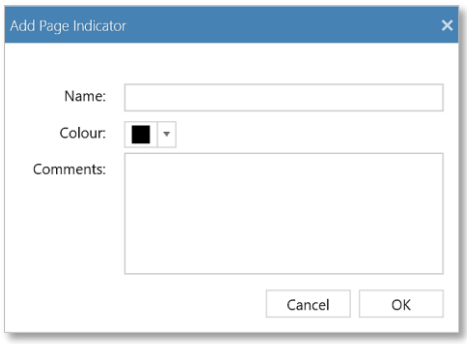
- To edit a sub activity, ***double-click*** the required sub activity, make any changes as needed and ***click*** *OK*.

6.3. Page Indicators

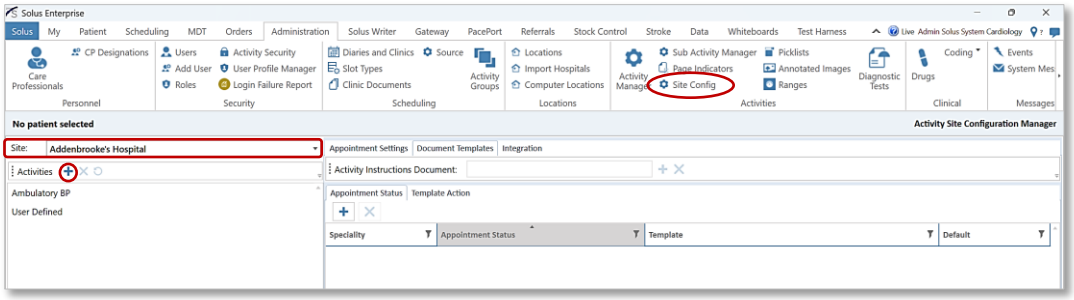


Page indicators allow you to create a group and assign a colour indicator to it. The group could be clinical teams, specialties, areas etc. Once this is done, the indicator can be assigned to a page on a module (see above). For example, the group could be ‘Cardiac Nurses’ and be assigned green and ‘Cardiac Physiologists’ assigned blue. A comment can be entered to give guidance to the user as to what the page indicator means.

- To add a page indicator, ***click*** the *+ Add* button to open a pop-up screen.
- Enter the required information and ***click*** *OK*.
- To edit a page indicator, ***double-click*** the required page indicator, make any changes as needed and ***click*** *OK*.

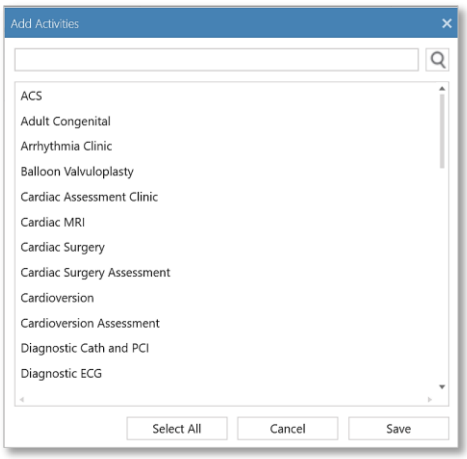


6.4. Site Config



The *Site Config* page is used for adding activities performed at each site as well as adding the appointment letters to each activity if required such as Booked, Cancelled, DNA, Pre Register.

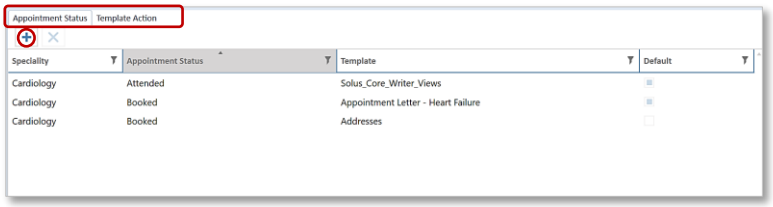
- To set the activities carried out at a specific location/site, select the location to be configured using the dropdown menu on the *Site* box.
- To add an activity to a site, ***click*** the ***+ Add*** button at the top of the left-hand column, a new pop-up screen will appear. Select the required activities from the list provided and ***click*** *Save*.
- To delete an activity, select the required activity from the list in the left-hand column and ***click*** **X** *Delete Selected Activity.*



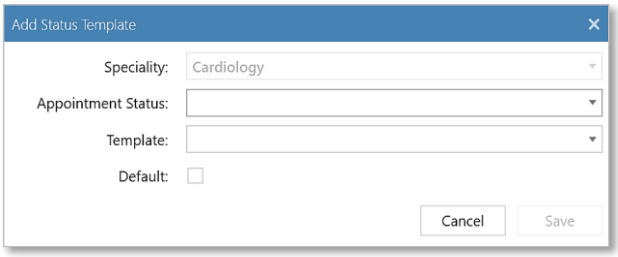
6.4.1. Adding Templates

Template Documents
Template documents need to be set up and associated with the correct site and appointment type or action before it can be added here. For more information on setting up template documents please see the Solus® Writer User Guide.

- To add template documents to an activity for the site first select the select activity from the left-hand column.

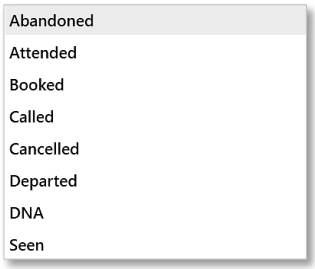


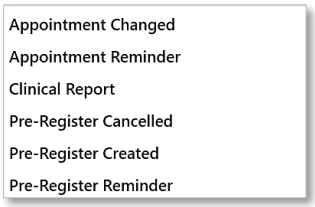
- In the right hand screen select the required tab *Appointment Status* or *Template Action* and click the **+** *Add* button. A pop-up screen will appear.



- Choose the appropriate *Appointment Status* / *Action* from the dropdown list, and the template.

Appointment status options

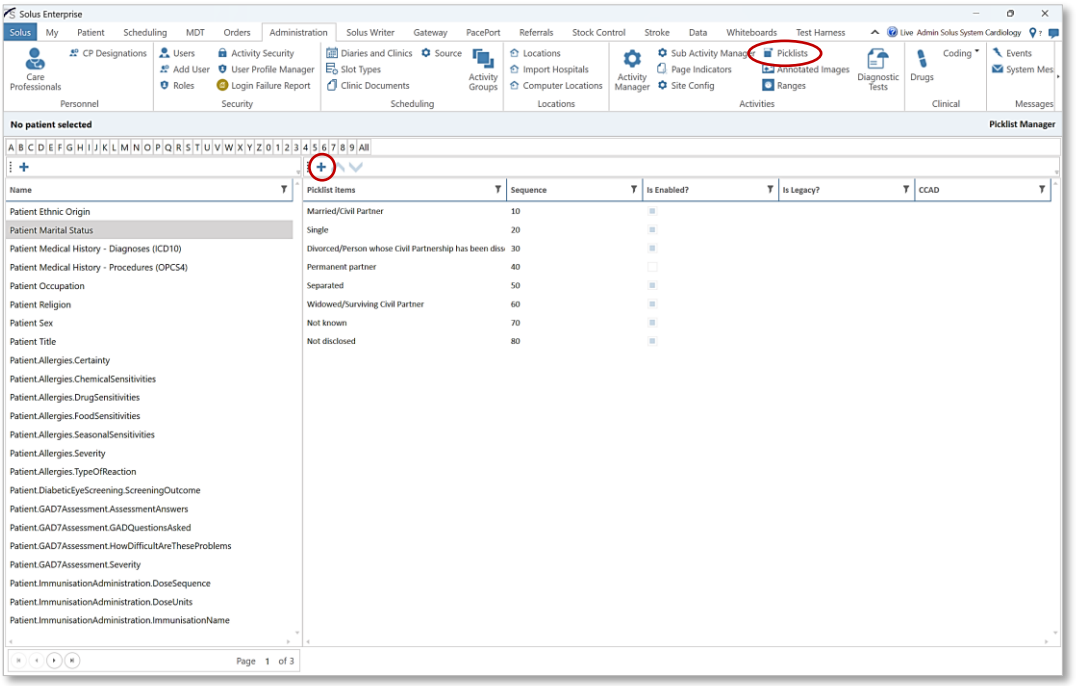




Action options

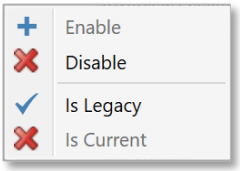
- If there is only one template for that status or action ***toggle on*** the *Default* box. If there is more than one template, then leave it unchecked.
- These templates will now be available when you print letters for appointment bookings, cancelled, DNA bookings, Pre Register letters, etc.

6.5. Picklists



Most picklists displayed in Solus are listed here. In this section they can be added, disabled and flagged as a legacy item. Legacy options are generally used for dataset updates where a picklist item is no longer valid but must be available to view for historic data.

- To navigate to a picklist, ***click*** on the first letter or number, or use the filter function at the top of the left-hand column.
- Select the picklist and the picklist items will be displayed on the right hand pane. These will be shown in the sequence they appear on the page and display a check box to show if they are enabled.
- By ***double-clicking*** on the picklist item, a pop-up screen will display the name and, if it is a National Dataset field, the coded value.
- Items can be added by ***clicking*** the **+** *Add* button at the top of the right-hand screen. The arrow keys can be used to change the order.
- To disable, enable or mark an item as legacy, select the picklist item and ***right-click*** then select your choice.

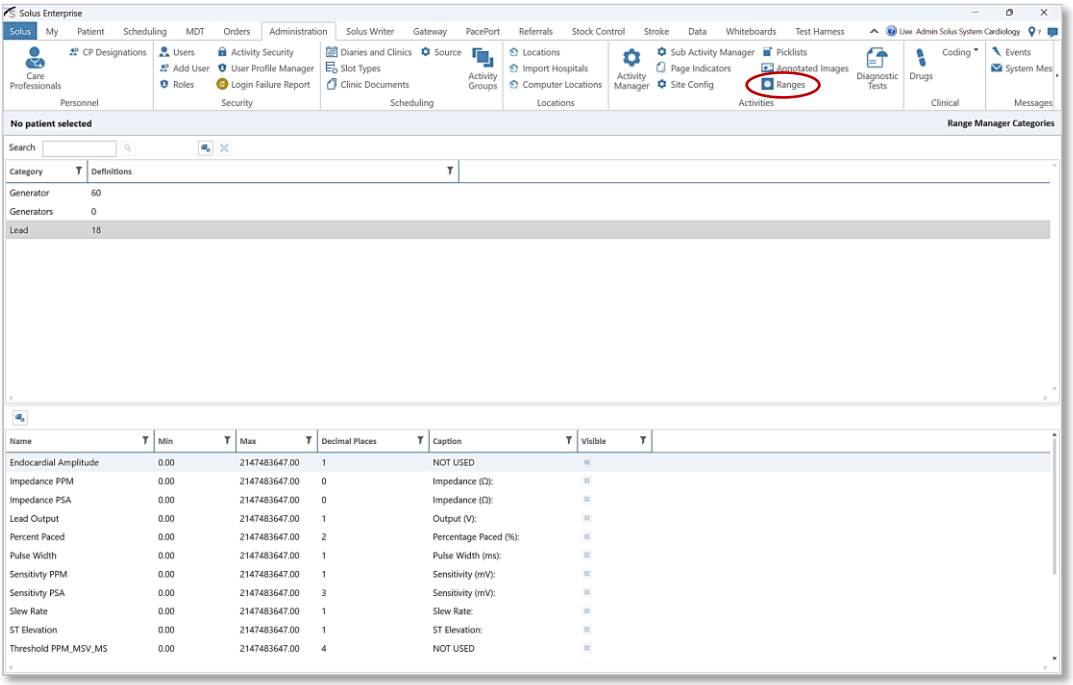


Dataset Items
Do not change the code or add items for dataset fields, if it is updated in the dataset HD Clinical will update this accordingly. If items are added to a dataset field picklist the data returned to NICOR may be invalid.

6.6. Annotated Images – no longer in use

This is where images can be stored for clinical use. This section has now been superseded by other reporting options and is no longer used. Historic images may still be visible on some systems.

6.7. Ranges

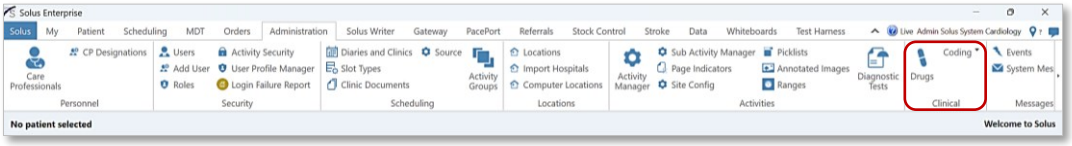


This section of administration is used to set the ranges for measurements in devices. For example, by selecting the category ‘Leads’ you can see a list of field names appear below. Each field can be edited to meet the requirements. The caption can be updated, minimum and maximum values can be set, and decimal places selected. When navigating to the fields in leads these changes will then be displayed.

6.8. Diagnostic Tests

This section is for use in deployment of modules in Solus by the HD Clinical team.

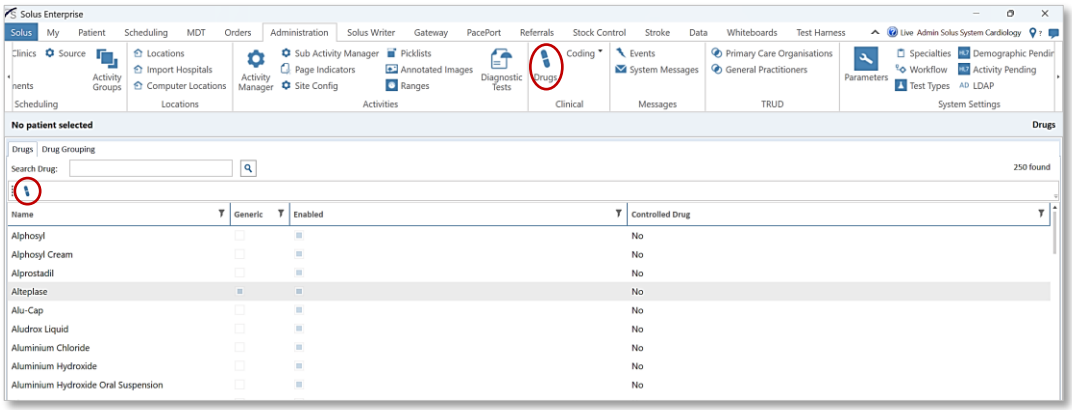
7. Clinical



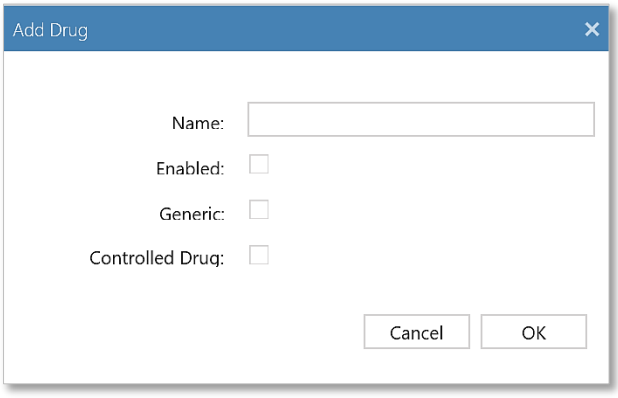
7.1. Drugs

7.1.1. Drug List

In this section there is a comprehensive list of drugs that are used throughout Solus. All drugs can be flagged as generic, a controlled drug and be enabled or disabled.



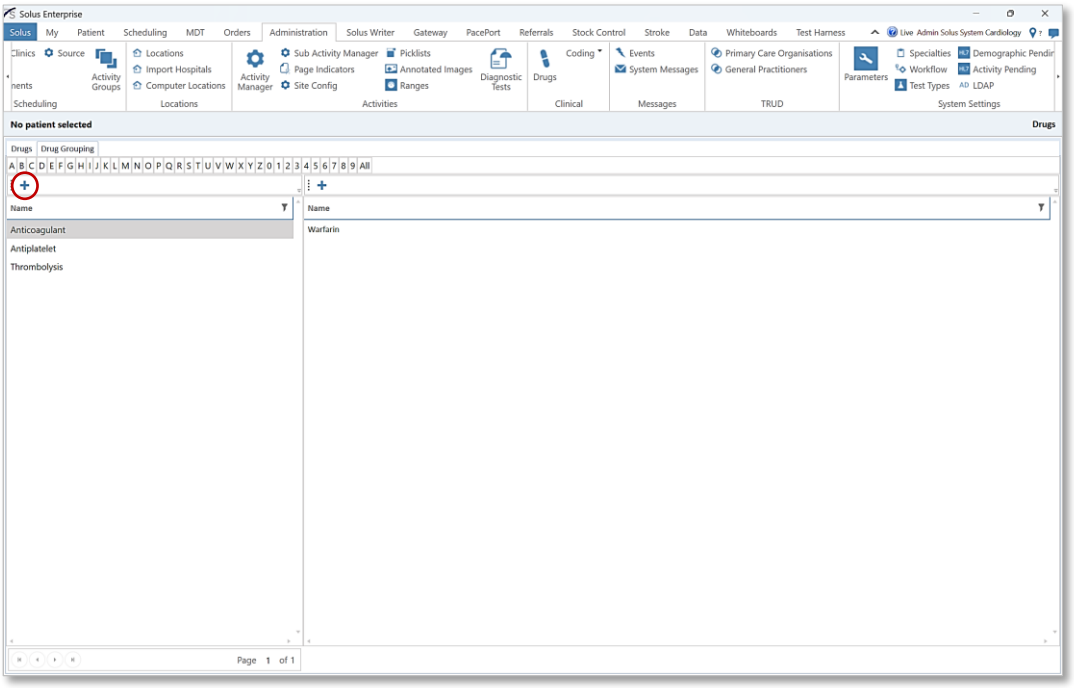
- To find a drug, fill in the *Search Drug* box and ***click*** the *Search* (leaving the search fields empty will bring up a list of all the drugs on the system).
- To add a drug, ***click*** the *Drug* button, a new pop-up screen will appear. Enter the required information and ***click*** *OK*.



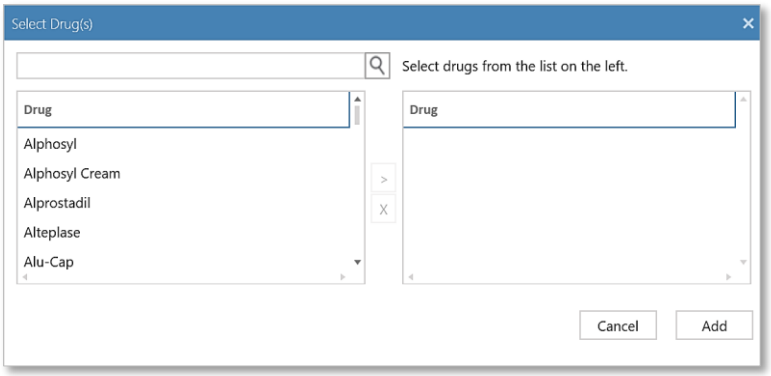
- To edit a drug, ***double-click*** on the required drug and the edit screen similar to the add screen will appear.

7.1.2. Drug Grouping

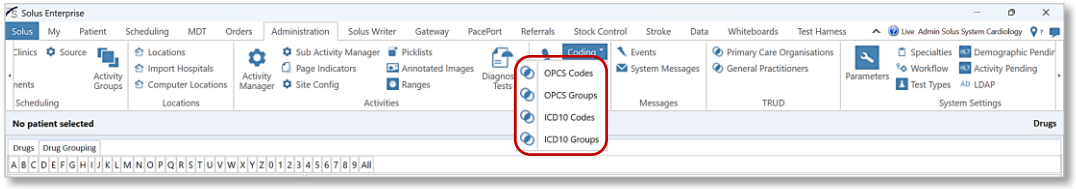
Drugs can be grouped to help filter down the results when selecting a drug.



- Groups can be added by ***clicking*** on the **+** *Add* button on the left of the screen. This will bring up a new pop-up screen. Add the group name and ***click*** *OK*.
- Any drugs in this group will show in the right-hand column.
- To delete a drug from a group, select it from the right-hand column and ***right-click*** then select *delete*.
- To add drugs to a group, first select the group name then ***click*** the **+** *Add* button above the right-hand column. A new pop-up screen will appear. Enter all or part of the drug name and ***click*** the *Search* button.
- A list of drugs matching that search will appear on the left. Use the > to add drugs to this group. When the list is complete ***click*** *Add*.



7.2. Coding



The coding section is where the list of ICD 10 and OPCS codes are stored in Solus. They are used throughout the modules to enable users to comprehensively record diagnoses, procedures and interventions for each patient.

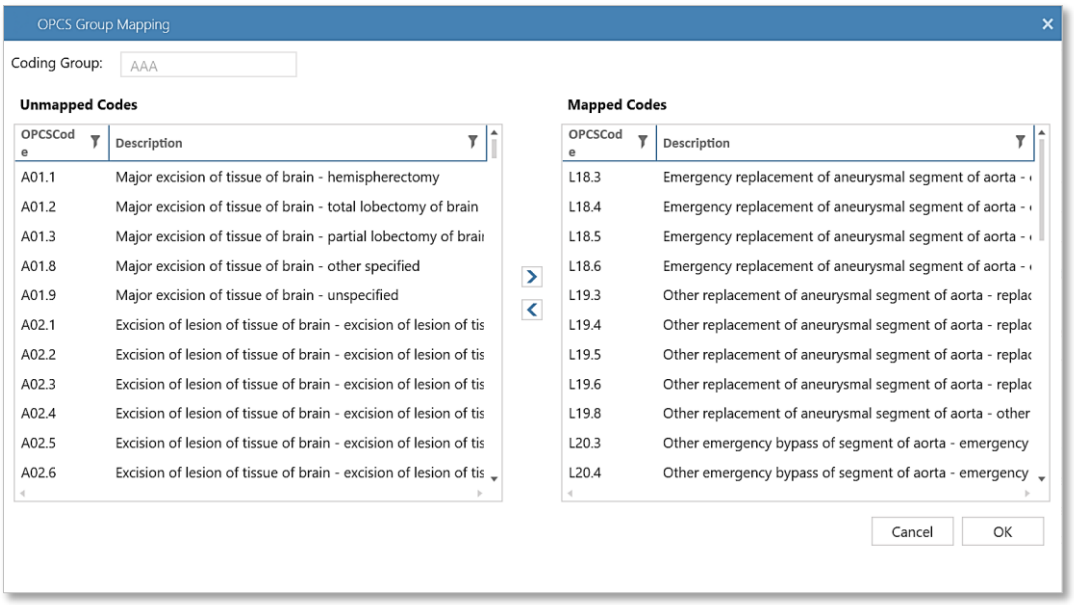
7.2.1. OPCS Codes

OPCS (Office of Population Censuses and Surveys) codes are a four-character alphanumeric system used in the UK to classify interventions and surgical procedures. OPCS codes contains the full list of available OPCS codes. The list can be searched by the OPCS code or description by entering the details in the search field and ***clicking*** *Search*.

7.2.2. OPCS Groups

OPCS groups allows you to group together OPCS codes for related items. A 'friendly name' can then be added to break down the item – this code can then be entered in the group several times with different friendly names. For example, a Pacemaker procedure has a set of available codes, but one can cover several types of operations.

- OPCS Groups can be added by ***clicking*** on the **+** *Add* button on the left of the screen. This will bring up a new pop-up screen. Add the group name and ***click*** *OK*.
- Any codes in this group will show in the right-hand column.
- To delete a code from a group, select it from the right-hand column and ***right-click*** then select *delete*.
- To add codes to a group, first select the group name then ***click*** the *Edit* button above the right-hand column. A new pop-up screen will appear.



- The available codes will appear on the left of the screen and those already grouped under this heading will appear on the right of the screen. Use the > and < buttons to edit the group. ***Click*** *OK* when finished.

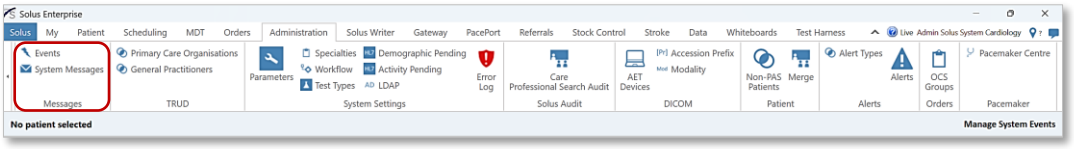
7.2.3. ICD10 Codes

ICD10 codes are the International Classification of Diseases codes for diseases, signs and symptoms, abnormal findings, complaints, social circumstances, and external causes of injury or diseases. The list can be searched by the ICD code or description by entering the details in the search field and ***clicking*** *Search*.

7.2.4. ICD10 Groups

This is the same as the OPCS groups but for diagnoses.

8. Messages



Note: You may need to use the scroll arrows on the navigation bar to see this function.

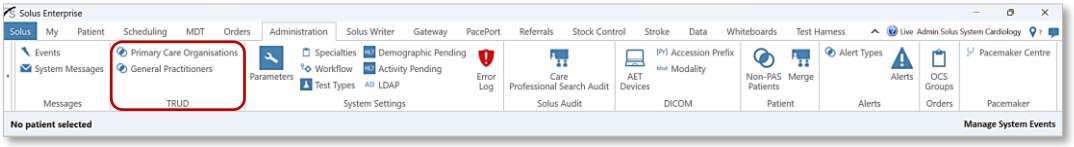
8.1. Events

All events for appointments and referrals are displayed here, including who created the event for auditing purposes. By default, the last 7 days are displayed but this can be increased or decreased.

8.2. System Messages

System messages can be created and sent to specific users or for all users within a role. These messages will then display when the user logs in, and a notification will appear with the number of messages in a message box on the top right of the page.

9. TRUD



Note: You may need to use the scroll arrows on the navigation bar to see this function.

The *TRUD* is the 'Technology Reference data Update Distribution' site. It is on the Health and Social Care Information Centre which contains reference files for use within the healthcare environment. HD Clinical's HL7 team maintains the upload of the TRUD which, in this case, contains the current CCGs, GPs and surgeries. A request will need to be sent to the HD Clinical Support Team to update the TRUD if required.

9.1. Primary Care Organisations

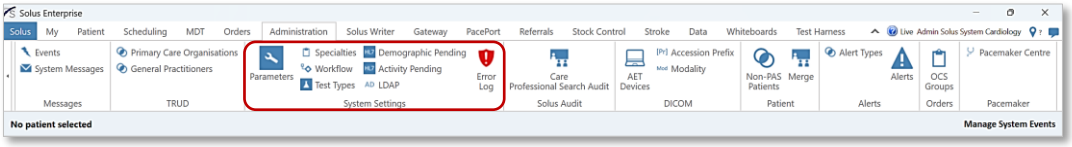
All primary care organisations are detailed here, along with their national code, region, status and HA code.

9.2. General Practitioners

All GPs in Solus are listed here and can be searched. The details show the GP, their national code, status and practice. By ***double-clicking*** and opening a record you can view more details.

Note: For further information or help on this section please contact the HD Clinical Product team.

10. System Settings



Note: You may need to use the scroll arrows on the navigation bar to see this function.

10.1. Parameters

Parameters
Parameters are used by the HD Clinical team to turn certain settings on and off and set default values. Although these may be visible on the system, please do not make changes to any of these settings.

10.2. Specialties

All specialties listed in Solus can be seen here. This list can be filtered down by selecting a letter or number from the banner. The specialties can also be enabled and disabled by ***double-clicking*** on the specialty and ***toggling on/off*** the field. To add a new specialty ***click*** *Add*.

10.3. Workflow / Test Types – Not in use

10.4. Demographic Pending

All patient demographics which have been sent from PAS and are waiting to be processed will be listed here.

10.5. Activity Pending

All patient activities which have been sent from PAS and are waiting to be processed will be listed here.

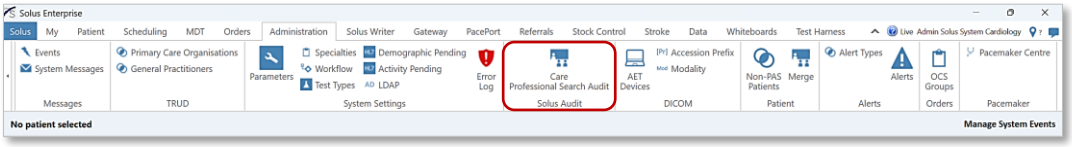
10.6. LDAP

LDAP (Lightweight Directory Access Protocol) is a software protocol used to connect Solus' login screen to the hospital network login. This means that when logging in users will use the same username and password that they use to logon to the hospital PC. When the hospital PC prompts a change of password the password in Solus will automatically update. When creating a user if you use 'Active Directory' as the user type and by using the unique hospital username, Solus can validate the user via the trust's network directory. The path would be supplied by the trust's IT department and by working in conjunction with HD Clinical.

10.7. Error Log

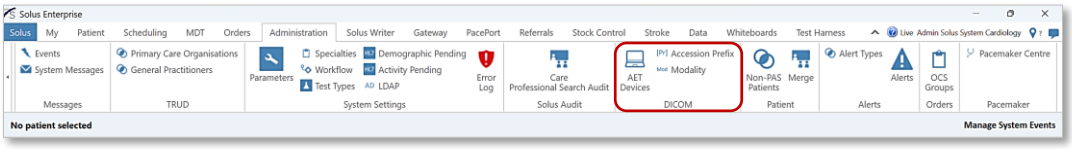
Any errors which have occurred in the background will be listed here. This is used by HD Clinical Support to resolve any issues.

11. Solus Audit – Not in use



Note: This tab has now been replaced with a report within the *Data* section and is no longer in use.

12. DICOM



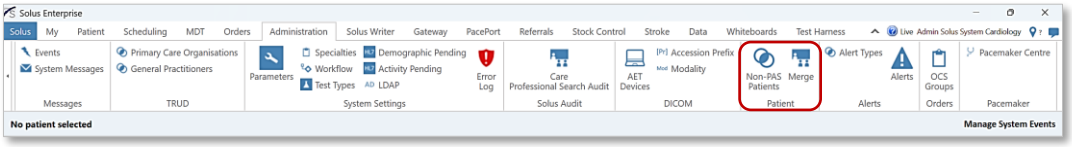
Note: You may need to use the scroll arrows on the navigation bar to see this function.

DICOM (Digital Imaging and Communications in Medicine) is a worldwide standard for the digital storage, transmission, and display of medical data. It ensures that different medical devices and systems can communicate and exchange data seamlessly.

In Solus it enables a worklist to be sent and to receive information back on patients from medical devices so long as the necessary interfaces have been set up.

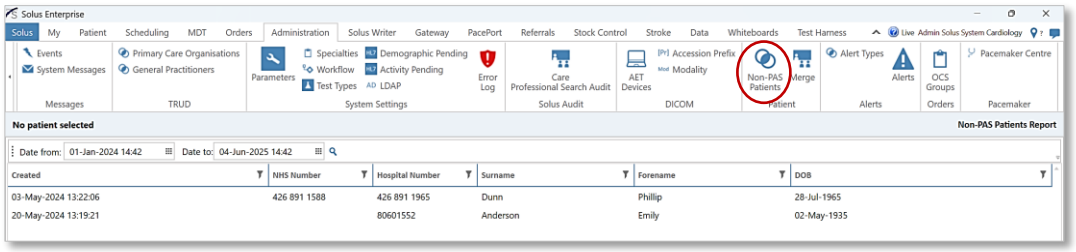
Note: For further information or help on this section please contact the HD Clinical Product team.

13. Patient



Note: You may need to use the scroll arrows on the navigation bar to see this function.

13.1. Non-PAS Patients



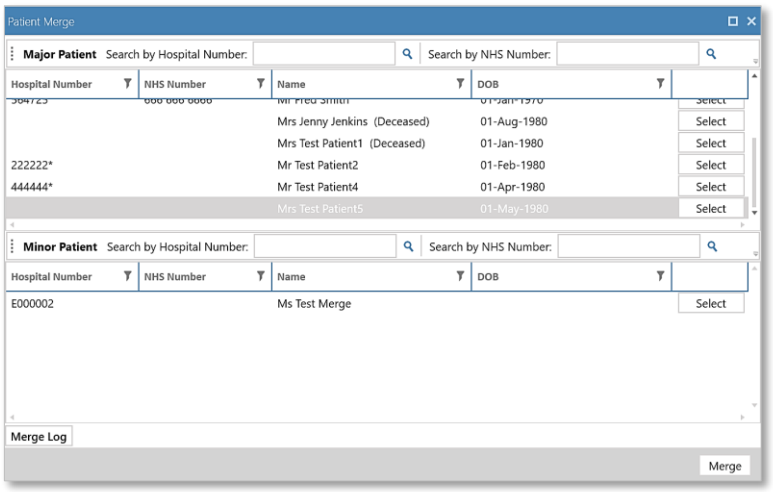
Any patients that have been added to Solus manually and not through the hospital PAS can be searched by a date range and listed. To narrow down this list further use the filter options at the top of each column.

To merge this patient with another record, ***double-click*** the required patient and this will take you to the *Merge* pop-up screen, see below.

13.2. Merge

To access the Merge function, either search for the *Non-PAS* patient and ***double-click*** or go to *Administration>Patient>Merge.* Merge allows you to bring together two patients on Solus that are the same patient but have different hospital numbers. For example if a patient was admitted for an emergency procedure and their correct hospital number was not known. By merging the patients all information held on the newly created number will populate in the correct hospital number and the incorrect number will disappear.

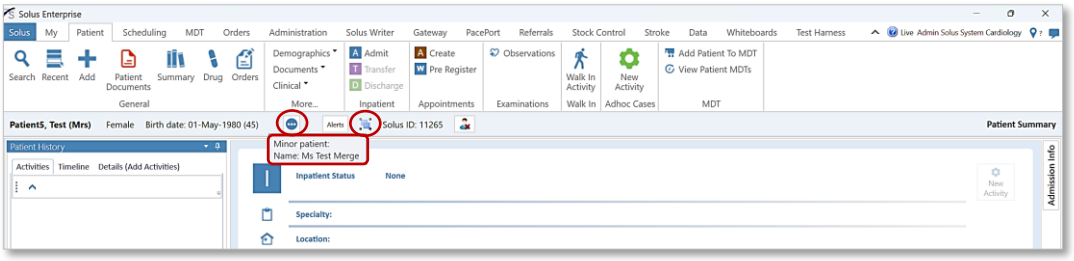
You will see there is a line for *Major Number* and *Minor Number*. The major number is the patient you will keep, and the minor one is the number of the patient who will be merged.



- If you know the Hospital/NHS number for the major patient, enter it into the search boxes and ***click*** *Search*. Ensure the required major patient is selected, this can be seen by the grey highlight.
- Enter the minor patient's Hospital/NHS number and ***click*** *Search,* or if you had already selected this patient from the *Non-PAS* search, this patient will already be listed. Ensure the minor patient is selected.
- ***Click*** *Merge* at the bottom of the pop-up screen. These patients will now be merged.

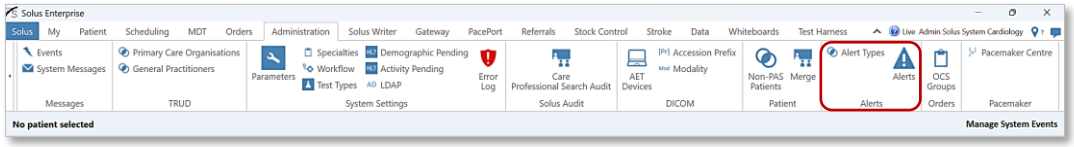
Merged Patients

When in the patient record of the major patient, the *Merge* icon will display on the patient banner indicating that this patient has a merged record. When you hover over the icon, it will display details of the minor patient that have been merged.



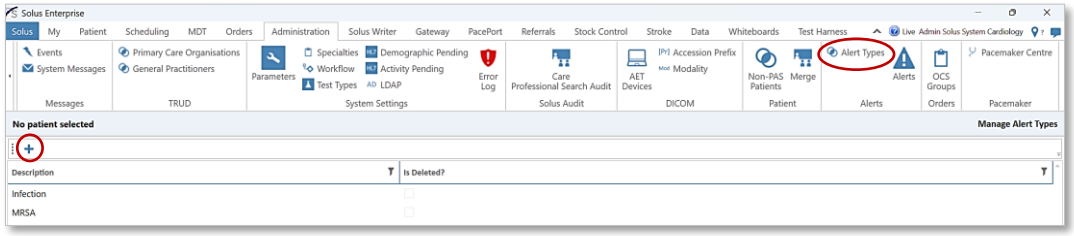
In a similar way if you hover over the ... icon a list of any other hospital numbers associated with that patient will be displayed.

14. Alerts



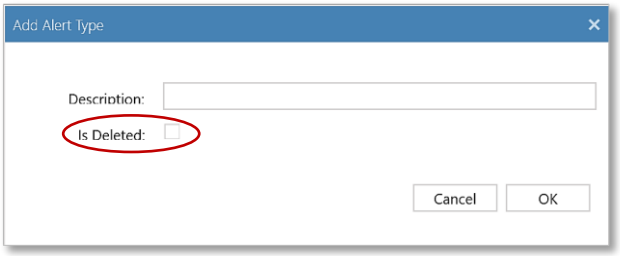
Note: You may need to use the scroll arrows on the navigation bar to see this function.

14.1. Alert Types



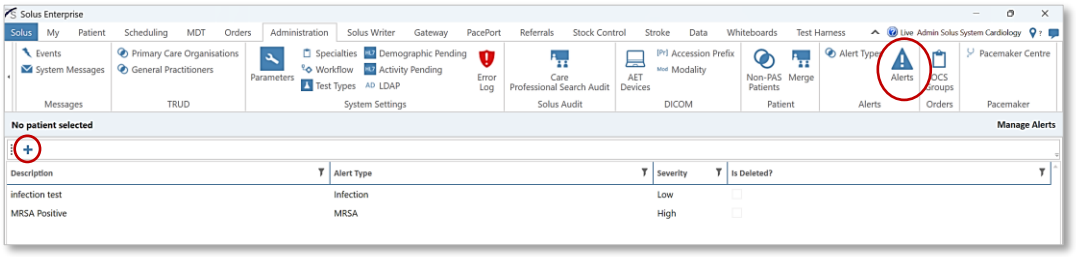
In this section bespoke patient alert types can be viewed, edited and created.

- To add a new alert, ***click*** the **+** *Add* button, a new pop-up screen will appear.
- Enter the name of the new alert and ***click*** *OK*. The alert type will appear on the list in the main page.

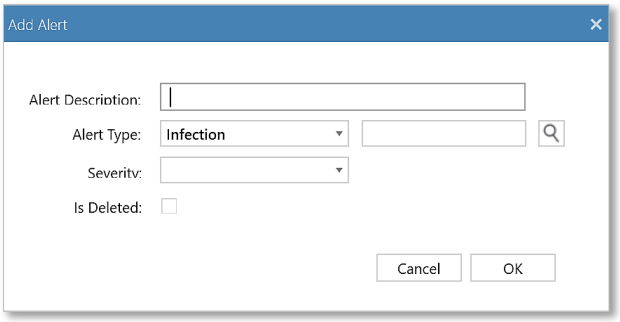


- To edit an alert type, ***double-click*** on the required alert and edit screen will appear.
- To delete an alert type, ***toggle on*** the *Is Deleted* box. The description will still appear in the list but in the *Is Deleted* column there will be a blue box which means the alert type is inactive.
- Deleting and undeleting can also be done by selecting the alert type from the main list and ***right-clicking***. Then select the undelete or delete options.

14.2. Alerts

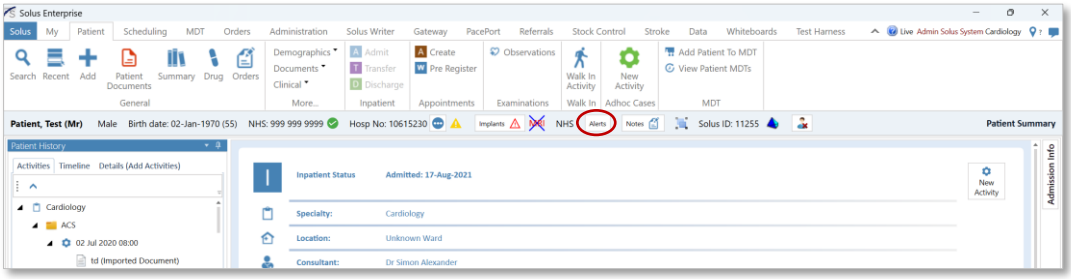


- To create an alert i.e. Infection or Pacemaker you can then go to *Administration>Alerts>Alerts* and ***click*** the ***+ Add*** button, a new pop-up screen will appear.
- Enter the description, alert type and severity and ***click*** *OK*.
- To edit an alert, ***double-click*** the required alert from the list on the main page.

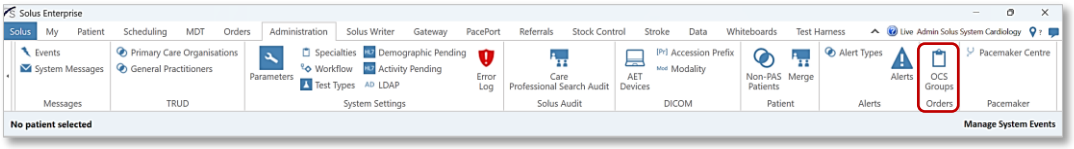


Patient Alerts

When in the patient record, an *Alerts* button is visible on the patient banner. Click on this button and any alerts already set will be displayed in a pop-up screen. This pop-up screen will also allow alerts to be added, edited or deleted.



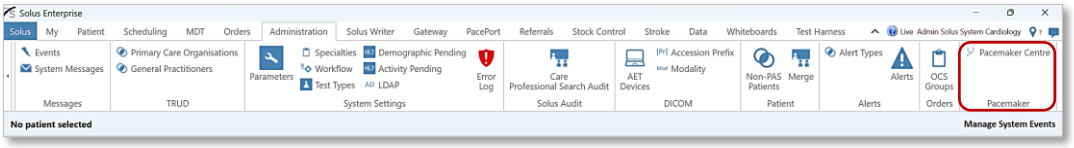
15. Orders



Note: You may need to use the scroll arrows on the navigation bar to see this function.

Limited Usage
This section is only used by a very small number of users. If you do use this section and require help, please contact the HD Clinical Product team.

16. Pacemaker

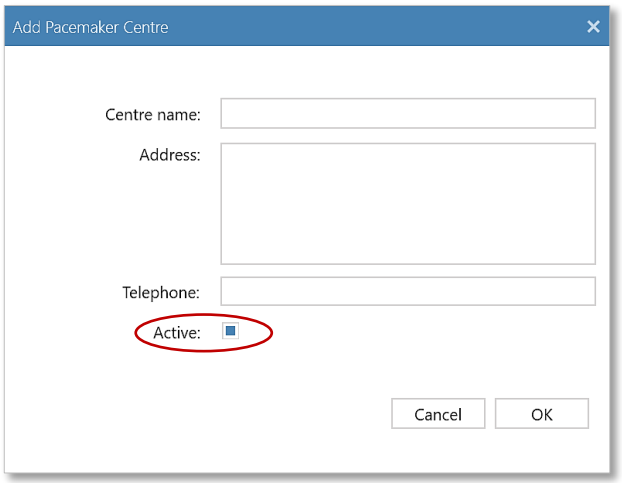


Note: You may need to use the scroll arrows on the navigation bar to see this function.

16.1. Pacemaker Centre

The Pacemaker Centre is where the address is added for where device procedures and follow ups take place or as a contact in an emergency. This address is shown on the ID Card.

- To add a pacemaker centre, ***click*** the **+** *Add* button, a new pop-up screen will appear.
- Fill in the information and ***click*** *OK*. The pacemaker centre will appear on the list in the main page.
- To edit a pacemaker centre, ***double-click*** on the required address and edit screen will appear.
- To make a centre active/inactive, ***toggle on/off*** the *Active* box.



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