



**SOUTH WEST ALLIANCE OF RURAL HEALTH (SWARH)**



**SWARH SECURE DOCUMENT PORTAL**

# **SWARH SECURE DOCUMENT PORTAL (SSDP) USER GUIDE**

**Version 1.1**

October 2014

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## INTRODUCTION

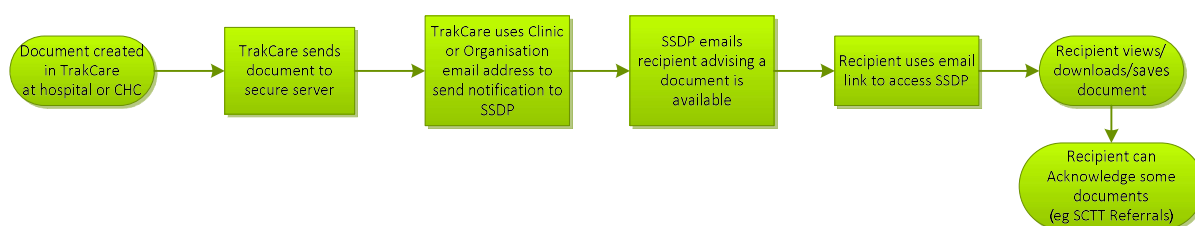
The SWARH Secure Document Portal (SSDP) has been developed to provide Clinics and other Organisations with secure access to patient/client related health information. Hospitals in the SWARH region will upload to the SSDP documents such as:

- Discharge Summaries
- SCTT Referrals
- Non-Admitted Referral Acknowledgements
- Non-Admitted Client Feedback
- Non-Admitted Client Discharge Management Plans

Each time a patient/client related document is uploaded to the SSDP, the relevant recipient will receive an email advising that a document is available (unless the user has changed notification preferences).

Clinics and Organisations will be able to access the SSDP to view/download these documents and save them to their own records. SCTT Referrals can be acknowledged using the SSDP.

A basic flowchart of the process follows.



Each nominated Clinic and Organisation will have its own unique account to access the SSDP, using a Username and Password to gain access. Key hospital staff will ensure that the correct email address for each Clinic and Organisation is entered into TrakCare code tables to facilitate communications. When an SSDP User Account is created for a Clinic or Organisation, an email will be sent to the new User with details of how to access SSDP and obtain their password.

As a user of the SSDP there are several options you can configure to suit your own requirements.

Documents will remain visible on the SSDP for 30 days. SSDP users should retrieve documents during this time.

## LOGGING ON TO THE SSDP

To access the SSDP use the following secure link: <https://ssdp.swarh.vic.gov.au>, enter your Username and temporary Password and click .

If you have not yet obtained your temporary password, please contact the SWARH Help Desk on 5564 4011 or [support@swarh.vic.gov.au](mailto:support@swarh.vic.gov.au) to obtain these details and to access assistance/guidance in logging on to the SSDP for the first time.



# SWARH SECURE DOCUMENT PORTAL

Log in.

---

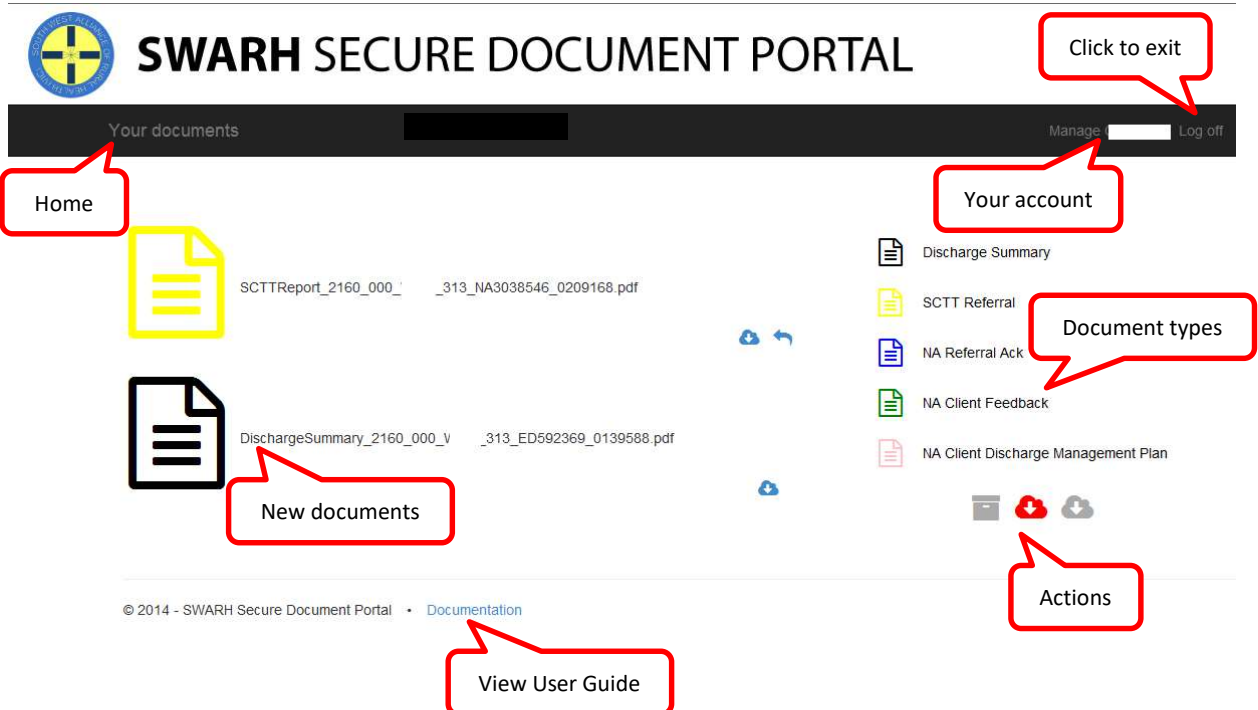
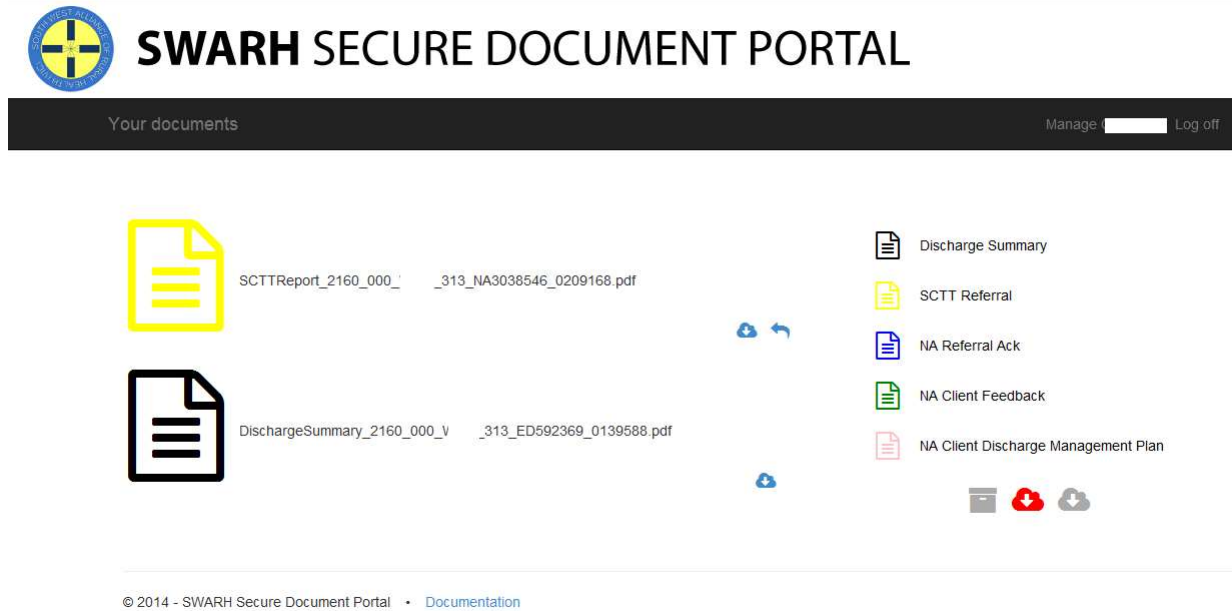
User name	<input type="text"/>
Password	<input type="password"/>
<input type="checkbox"/>	Remember me?
<input type="button" value="Log in"/>	

---

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## EXPLORING THE SSDP

After clicking [Log in](#) you will see a screen similar to the following:




## IDENTIFYING DOCUMENT TYPES

Each document type in SSDP has a unique colour code. This will assist in identifying documents when several have been uploaded to your account.

-  Discharge Summary
-  SCTT Referral
-  NA Referral Ack
-  NA Client Feedback
-  NA Client Discharge Management Plan




Note: "NA" refers to a "Non-Admitted" episode.




# SWARH SECURE DOCUMENT PORTAL






Your documents
Manage  Log off






SCTTReport\_2160\_000\_V\_313\_NA3038546\_0209168.pdf



DischargeSummary\_2160\_000\_V\_313\_ED592369\_0139588.pdf

-  Discharge Summary
-  SCTT Referral
-  NA Referral Ack
-  NA Client Feedback
-  NA Client Discharge Management Plan

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Documents listed on the left have not yet been viewed/downloaded and are available for viewing/saving.


When a document link has been newly posted onto the SSDP its colour will appear as above. Once the document has been viewed/saved, its colour will fade a little so, at a glance, the user can identify new documents.




# SWARH SECURE DOCUMENT PORTAL


Your documents Manage C [ ] Log off









**Newly posted document**

 DischargeSummary\_2160\_000\_\ \ \_313\_ED592369\_0139588.pdf

 DischargeSummary\_2160\_000\_\ \ \_313\_ED592369\_0180061.pdf

**Documents already viewed/downloaded**

 DischargeSummary\_2160\_000\_\ \ \_313\_ED592361\_0116139.pdf

-  Discharge Summary
  -  SCTT Referral
  -  NA Referral Ack
  -  NA Client Feedback
  -  NA Client Discharge Management Plan
-   

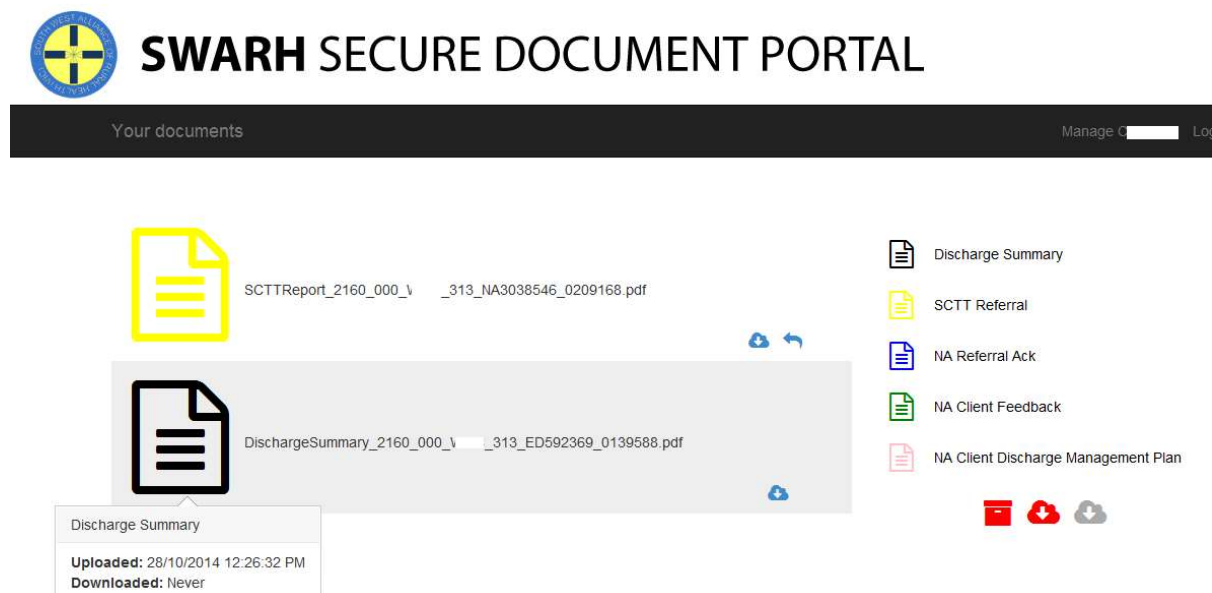
## AVAILABLE ACTIONS

There are several things you can do with each document appearing in the SSDP, as follows:

- View document information
- Download the document and save to your local location
- Open the file within SSDP
- Reply to some document types (eg SCTT Referrals)
- Download all new documents


## VIEW DOCUMENT INFORMATION

Hover over document icon to see further details (such as when it was Uploaded/Downloaded):



The screenshot shows the SWARH Secure Document Portal interface. At the top left is the SWARH logo, followed by the text "SWARH SECURE DOCUMENT PORTAL". Below this is a dark header bar with "Your documents" on the left and "Manage c [redacted] Log" on the right. The main area displays two document icons. The top icon is a yellow document icon with the filename "SCTTReport\_2160\_000\_v [redacted] \_313\_NA3038546\_0209168.pdf". The bottom icon is a black document icon with the filename "DischargeSummary\_2160\_000\_v [redacted] \_313\_ED592369\_0139588.pdf". A tooltip is visible over the bottom icon, displaying "Discharge Summary", "Uploaded: 28/10/2014 12:26:32 PM", and "Downloaded: Never". To the right of the document icons is a list of document types: "Discharge Summary", "SCTT Referral", "NA Referral Ack", "NA Client Feedback", and "NA Client Discharge Management Plan". At the bottom right of this list are three icons: a red square, a red circle with a white arrow, and a grey circle with a white arrow.

## DOWNLOAD A DOCUMENT

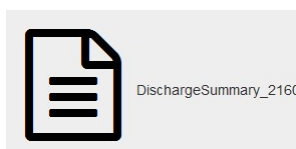
Click on  associated with document to start the download process.



Save the document to your own computer/server. Once downloaded, the document will disappear from the main screen – unless an option exists to Reply to the document.

## VIEW A DOCUMENT IN SSDP

Click once on the document icon to open and view the document. It is possible to Save or Print the document using the buttons at the top of the preview screen. Once viewed, the document will disappear from the main screen – unless an option exists to Reply to the document.



## REPLY TO A DOCUMENT

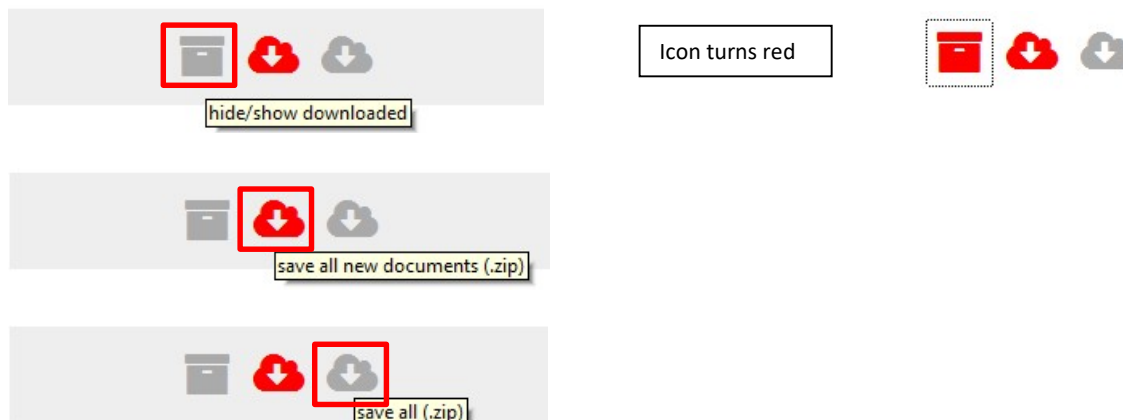
Reply is only available on SCTT Referrals and NA Client Feedback documents. See separate section on Acknowledging SCTT Referrals.



*Note: documents which have been viewed or downloaded will automatically disappear from the main screen but can be viewed by clicking the hide/show downloaded icon (see next page). Documents will remain on the SSDP for 30 days after which time they will automatically be deleted.*

## OTHER ACTIONS

Icons appear towards the bottom right of the SSDP screen. Hover over these to display their purpose.



Click an icon once to select it.

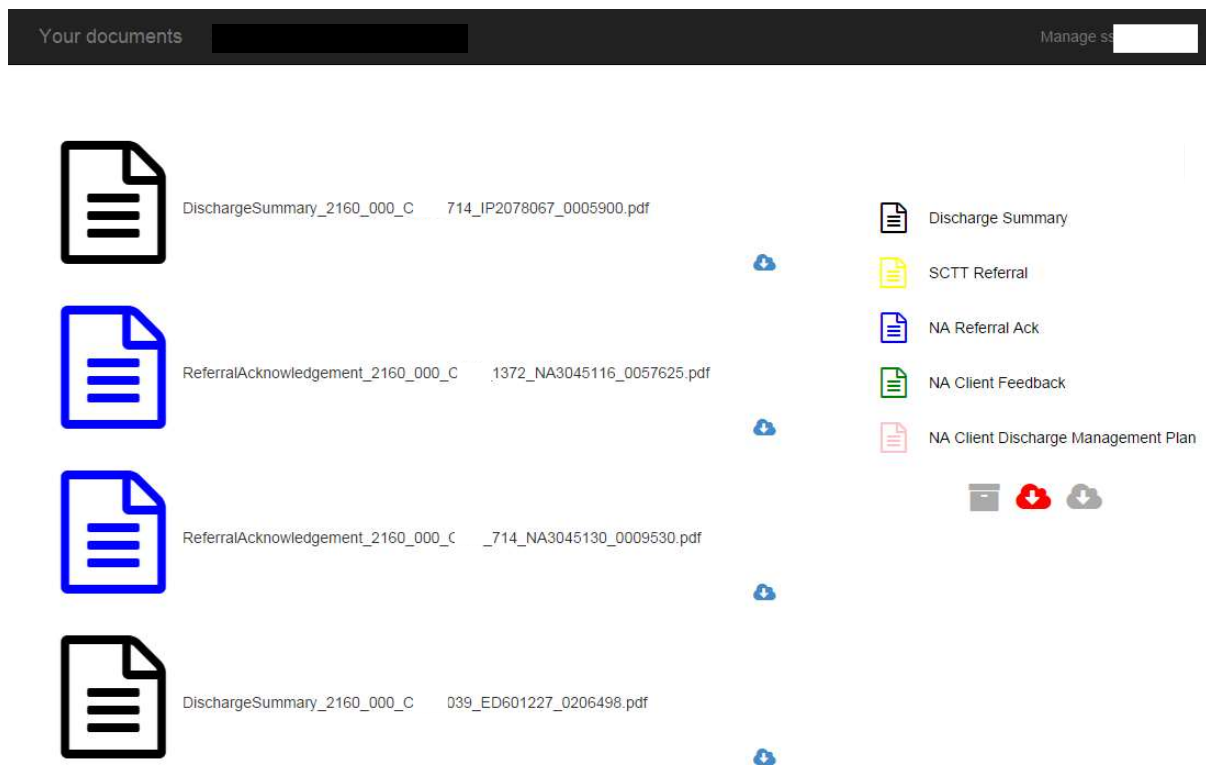
Icon	Meaning
	Hide (or show) all documents. Click once to display all documents (viewed and not yet viewed). Icon changes to . Click again to show only documents that haven't been viewed or downloaded. Icon returns to . You can further filter which documents display by clicking on a document type (eg Discharge Summary). Click again on that document type to turn off that filter.
	Save all <b>new</b> documents – the file download message appears, asking whether you want to open or save the <b>new</b> file/s. New files are those not previously viewed or downloaded. To save the file/s locally, select a location on your computer/ network and, if desired, enter a different file name. Each document will be saved as a PDF document in a zipped file.
	Save all – the file download message appears, asking whether you want to open or save the file/s (new and previously viewed/saved). To save the file/s locally, select a location on your computer/network and, if desired, enter a different file name. Each document will be saved as a PDF document in a zipped file.

## DISPLAY OPTIONS

### DISPLAYING ONLY NEW DOCUMENTS

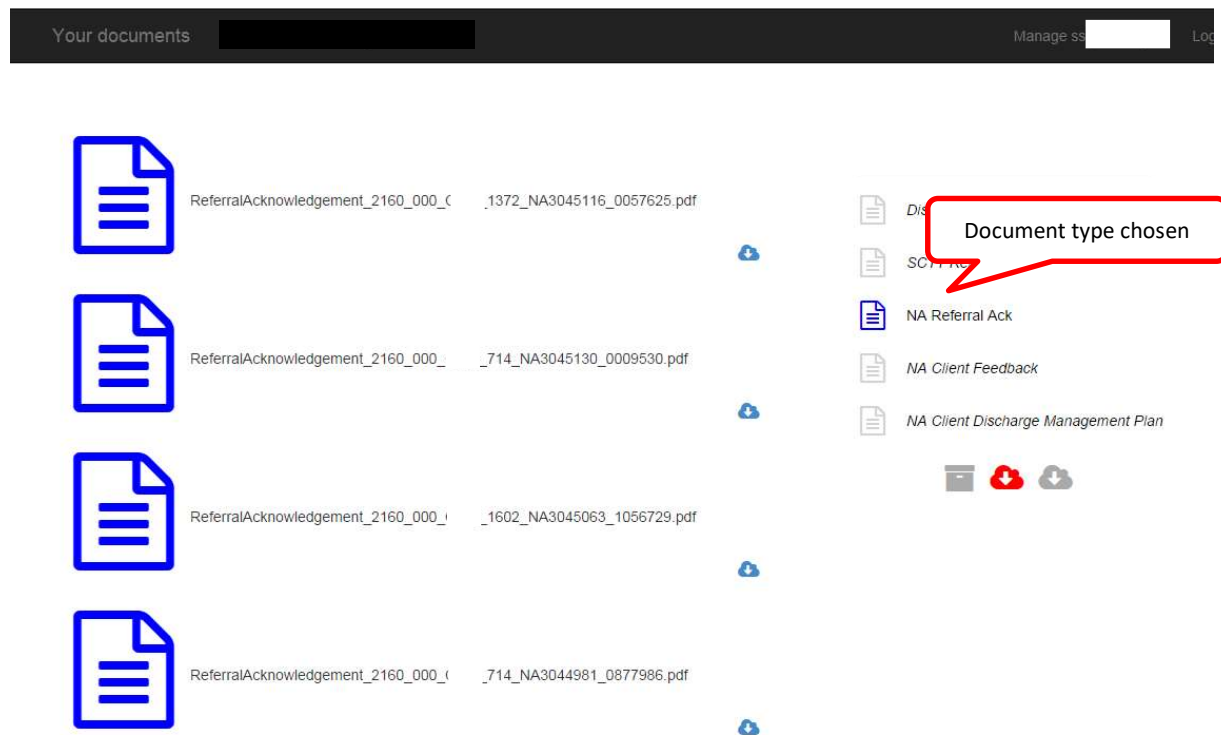
The default view in SSDP is to display only new documents (ie those that haven't been viewed/downloaded). Once most documents have been downloaded or viewed, they will disappear from the main screen, leaving only new documents visible. Any documents which you can Reply to will remain on screen until you have replied.

Example of new documents on main screen:



## DISPLAYING ONLY ONE TYPE OF NEW DOCUMENT

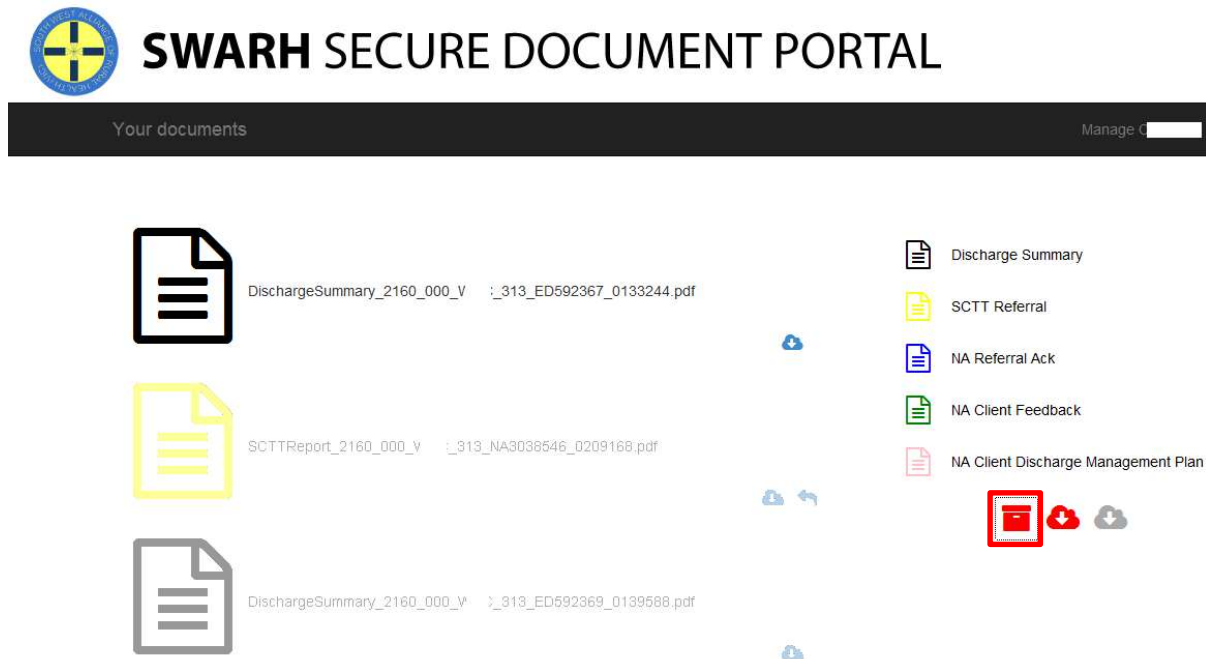
Where you have received several different types of new documents and want to focus on just one type, you can click any of the document type icons on the right of the screen to limit what is visible. The document type selected will show clearly and all other document types will display in grey.



To remove the document type filter, click the document type icon again. All document types will become available.

## DISPLAYING NEW AND OLDER DOCUMENTS

All documents – new and previously viewed/downloaded documents – can be displayed by clicking the “hide/show downloaded” button (☐). The icon changes to ☐. Example of screen once “hide/show downloaded” has been clicked:





## DISPLAYING CERTAIN TYPES OF DOCUMENTS

You can further filter which documents display by clicking on a document type (eg Discharge Summary). Click again on that document type to turn off that filter.

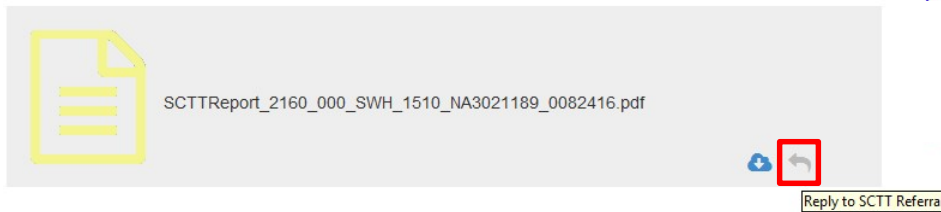
The screenshot shows the SWARH Secure Document Portal interface. At the top left is the SWARH logo, followed by the text "SWARH SECURE DOCUMENT PORTAL". Below this is a dark header bar with "Your documents" on the left and "Manage C [redacted] Ld" on the right. The main content area displays a list of documents. A filter menu is open on the right side, listing document types: "Discharge Summary" (highlighted), "SCTT Referral", "NA Referral Ack", "NA Client Feedback", and "NA Client Discharge Management Plan". A red callout box points to the "Discharge Summary" option with the text "Filter to show only Discharge Summaries". Another red callout box points to the other document types in the list with the text "All other types show in *italics*". A third red callout box points to a red square icon in the bottom right of the document list with the text "Turn off".

## RETURNING TO NORMAL VIEW


When finished viewing a filtered list of document click on  to show only documents that haven't been viewed or downloaded. The icon returns to .

## ACKNOWLEDGING SCTT REFERRALS

SCTT Referrals can be Acknowledged via SSDP, which sends a response back to the party which initiated the SCTT Referral. **Note: DO NOT reply to the email notification regarding a new document being available for you.** The only way to respond to a document is by using the Reply icon against a document within SSDP.



To Acknowledge a SCTT Referral, click on the “Reply to SCTT Referral” icon when hovering over the document. You can make a Comment and select to either “Acknowledge” or “Reject” a SCTT Referral.

A screenshot of a dialog box titled 'Send response' with a close button (X) in the top right corner. Below the title bar is a 'Comment' label and a large empty text input field. At the bottom of the dialog, there are two buttons: 'Acknowledge' and 'Reject'.

After choosing “Acknowledge” or “Reject” a message similar to the following will appear.



Once the Reply has been sent, click the close X in the top right corner to remove the message. The Reply icon disappears from the document and the document will disappear from the main screen.



## EMAIL NOTIFICATIONS

Whenever a new document is available for you on the SSDP, you will receive an email notification. The email will indicate the type of document that has been uploaded and will provide a link to directly access the SSDP (you will be required to enter your Username and Password).

Sample email notification:

**Notification from SWARH Secure Document Portal**

Secure Document

If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Tue 26/08/2014 10:50

To: Ma



## SWARH SECURE DOCUMENT PORTAL

Good morning C

A new 'Discharge Summary' for your organisation has been posted to the SWARH Secure Document Portal (SSDP). To access the document/s on this secure portal use the following link and enter your Username and Password:

[DischargeSummary 2160 000 CMC 1372 ED581501 0066335.pdf](#)

Please report any issues with accessing the SSDP to [support@swarh.vic.gov.au](mailto:support@swarh.vic.gov.au).

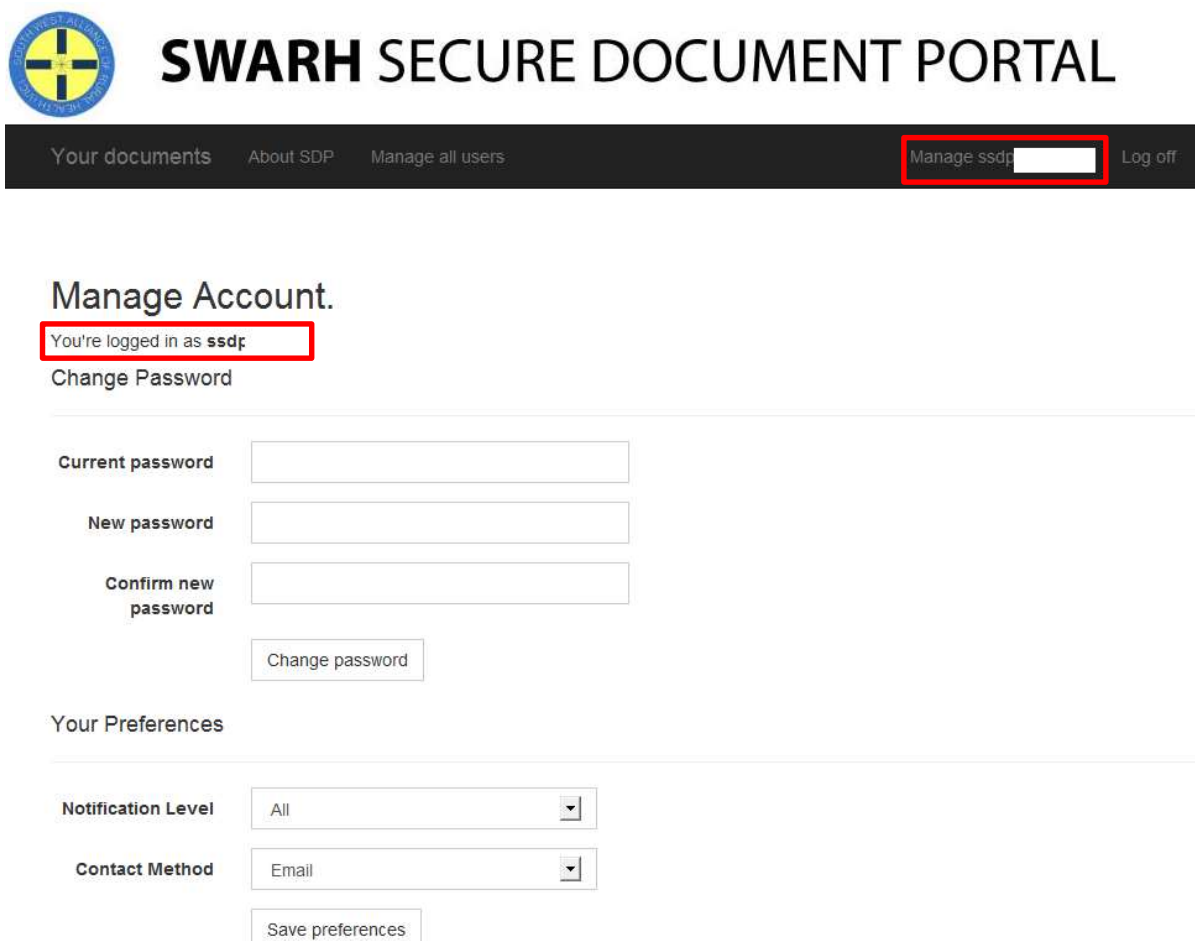
Best Regards,

The Team@SWARH

## MANAGING YOUR SSDP ACCOUNT

Once logged onto the SSDP you can change your Password and set some Preferences regarding how you want the SSDP to interact with you.

Click “Manage (username)” near the top right corner of the SSDP screen. The Manage Account details will be displayed.



**SWARH SECURE DOCUMENT PORTAL**

Your documents About SDP Manage all users Manage ssp: [redacted] Log off

### Manage Account.

You're logged in as ssp: [redacted]

Change Password

Current password

New password

Confirm new password

Change password

Your Preferences

Notification Level

Contact Method

Save preferences

Passwords in the SSDP need to be “strong”, ie they must meet the following specifications:

- A minimum of 8 characters in length
- Must contain at least one Upper Case Letter
- Must contain at least one number
- Must contain at least one special character (eg @\$%^&\*())

Enter Current and New Password details and click  .

Your Preferences for Notifications can be:

- All
- All except daily summaries
- All except discharge summaries
- SCTT Referrals only
- None

Select an option and click  .

## GETTING HELP

If you have any queries regarding how to use SSDP or difficulties while using SSDP, please contact the SWARH Help Desk on 5564 4011 or [support@swarh.vic.gov.au](mailto:support@swarh.vic.gov.au).