SYNCRONYS HIE CLINICAL PORTAL TRAINING   SEARCHING THE CLINICAL DOCUMENTS TREE
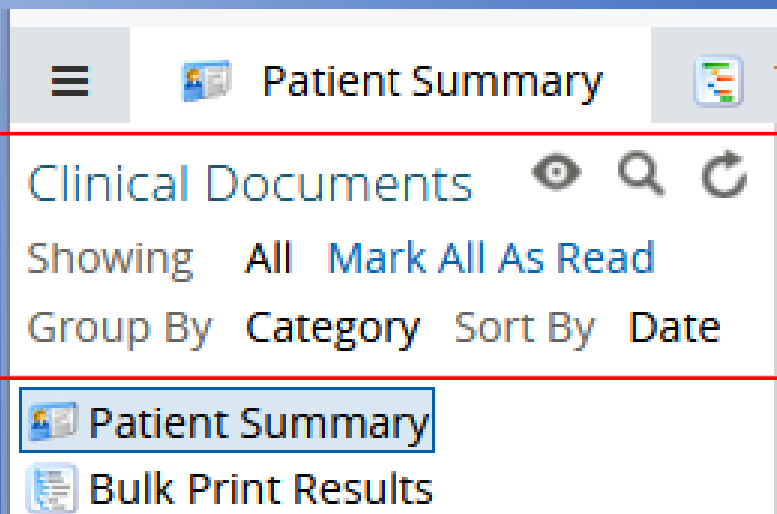   CLINICAL VIEW USERS, NM LEVELS 1, 2, 3

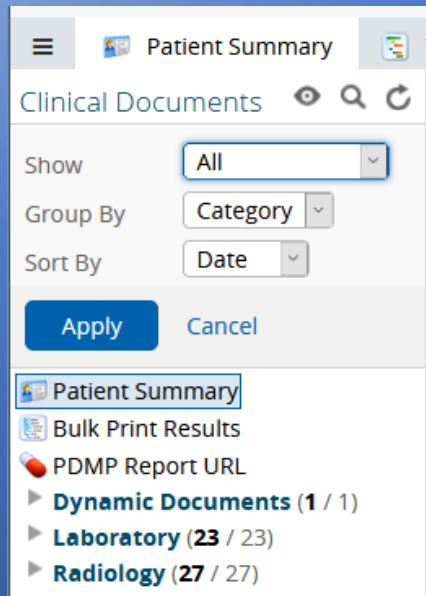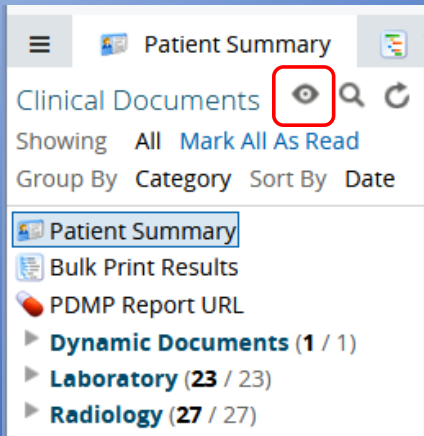# SEARCH TOOLS IN CLINICAL DOCUMENTS

Using search tools in the clinical documents section of the portal.

TOOLS FOR THE CLINICAL DOCUMENTS TREE

In this quick lesson, we want to make you aware of some tools that apply in the Clinical Documents area. You will see three icons next to the Clinical Documents header.
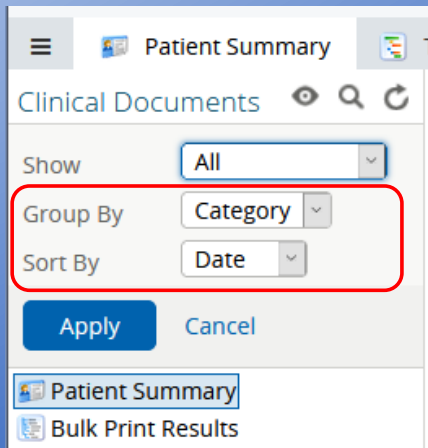
If you hover over the first icon, the eye shaped icon, a label appears letting you know that this helps you "Configure the Document Tree". Clicking on the icon expands the controls allowing you to specify a time frame, either recent history or a specific date range.

You may also mark all documents as having been Read.

CONFIGURE THE DOCUMENT TREE — **GROUPING AND SORTING**

- Grouping – Select the option from the list to change the grouping by which the documents are displayed.
- Sorting – Select the field by which the documents are sorted.

You can also rearrange what you see in the clinical documents tree by grouping or sorting according to your preference.

Group by:
- Category - the document type; for example, hematology or serology laboratory result
- Date - the date the document was created or received from an external system
- Service - the service (department or specialty) with which the document is associated; for example, Lab or Microbiology.
- Author - the name of the clinician responsible for ordering or creating the document.

Or perhaps you would rather sort by Date, Title, or Author of the document.

SEARCH FOR A DOCUMENT
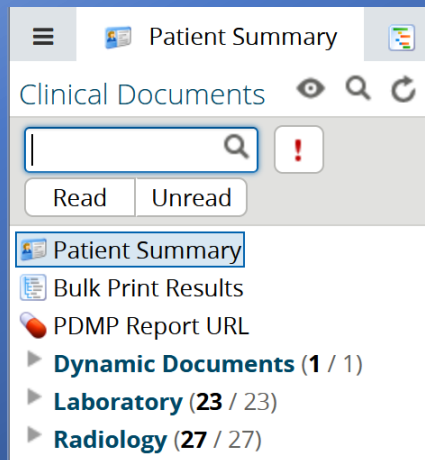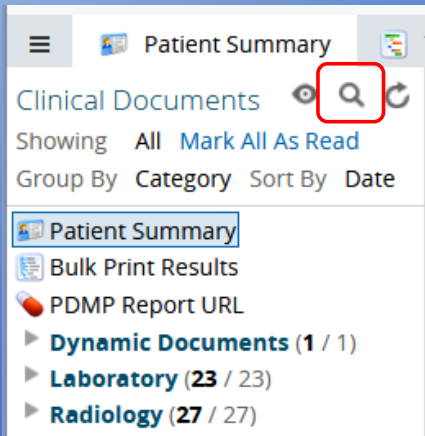
The next icon to the right is a magnifying glass, commonly used to represent a search. Clicking on this "search for a document" tool brings up a search criteria field where you can type in the name of a test or document. Start typing the title of the document into the search field. As you type, the Document Tree filters the list to display the documents that match the search criteria.

This search tool will also allow you to search for important results, indicated by the red exclamation point icon, or to toggle between Read and Unread results.

To hide the search panel, click the Search icon again.

The third icon is a circular arrow that refreshes your view of the Document Tree. Refreshing the Document Tree displays the documents using the default settings; any filters will be ignored, and all expanded categories will collapse.

To refresh the Document Tree, click the **Refresh** icon at the top of the panel.