

# Basildon & Thurrock place their Trust in ViewPortal® to deliver best practice and minimise risk



Basildon and Thurrock University Hospitals   
NHS Foundation Trust

Patients come first at Basildon and Thurrock University Hospitals NHS Foundation Trust. This award-winning Trust, which provides an extensive range of acute medical services to a population of more than 310,000 in South West Essex, is committed to an ongoing programme of investment in people, facilities and technology in pursuit of this goal.

One core initiative is to ensure that the Trust's high standards of clinical governance evolve so that the correct versions of controlled documents, such as those relating to key policies and procedures, are shared effectively by 3,500 members of staff.



## Minimising clinical risk

Historically, controlled documents have been printed and stored in paper archives, then retrieved manually as required. Although this system has served the Trust well in the past, the management team recognised that an electronic document management (EDM) system would eliminate the inherent limitations of paper archives and reduce the substantial effort required to prevent unacceptable risk from occurring. The Trust has an obligation to manage risk under the Standards for Better Health, including the Risk Management Standards, and EDM systems have become a key enabling technology.

As soon as funding for the project was approved in March 2005, the Trust built an evaluation team to scope the project, issue a tender and assess responses. The evaluation team recruited representatives from various departments including IT, nursing, clinical governance and risk assessment, to ensure that all requirements were met.



ViewPortal  
Healthcare

## Top 10 EDM criteria

- 1 Intuitive user interface:** the system had to be user friendly and eliminate the need for widespread user training.
- 2 Intranet access:** all users with a valid login to the Trust's intranet are deemed security cleared to access controlled documents.
- 3 Logical hierarchical structure:** users must be able to access all published document types in the central repository via advanced searches or folder navigation.
- 4 In-context searching:** document retrieval using selected key words contained anywhere in the body text must be possible.
- 5 Accurate version control:** previous versions of documents must be archived for pre-determined timescales.
- 6 Standard document templates:** must be linked to control workflow and enforce completion of mandatory sections.
- 7 Multi-format source documents:** including HTML, RTF, PDF, Microsoft and scanned images.
- 8 Indisputable audit trails:** all user activity should be traceable by user id, date and time, whether publishing, modifying or simply viewing a document.
- 9 Administrator training:** to continually support designated publishers.
- 10 Effective workflow:** to manage approval routing for Trust policies, procedures, protocols and guidelines via email, including trigger events such as chasing reviewer comments, reminders for periodic document reviews etc.

## Evaluating the criteria

The Trust's primary objective was: 'to create a framework that allows the controlled publication of both National Institute for Health and Clinical Excellence (NICE) guidance and Trust policies, procedures, protocols and guidelines, and to provide a means by which all Trust staff can easily access this published information.' The evaluation team's top ten EDM criteria are listed left.

The evaluation team initially compiled a shortlist of three, then in December 2005 awarded the contract to SpectrumITech based on the company's ability to understand the Trust's requirements and meet all ten specified criteria at an affordable price.

According to Phil Burke, IT Projects Manager at the Trust, "When we compared the short-listed alternatives we found that SpectrumITech's ViewPortal Healthcare provides the same power, flexibility and capabilities as other more expensive systems. ViewPortal Healthcare is immensely scalable, providing an excellent repository that can be extended for use in a variety of departments throughout the Trust. SpectrumITech's staff were diligent and attentive, and we felt they were the most credible company for us to partner with."

Basildon and Thurrock have purchased ViewPortal Healthcare licences, which enable designated users to manage the process involved in making controlled documents available for viewing by the Trust's 3,500 staff members, via secure intranet. Published documents are classified to enable rapid retrieval, either via advanced search or folder navigation. ViewPortal Healthcare is transparent to clinicians and other users, as document searches are initiated using a Google-like search facility that is already familiar to them.

## The results

The advantages of the Trust's EDM solution run far deeper than the obvious tangible benefits. These include saving the cost of printing and storing duplicates, and saving time that would previously have been spent filing, searching for correct documents, working through approval processes and chasing reviewers for comments, thereby increasing productivity. More fundamentally, ViewPortal Healthcare enables the Trust to use best practice methods, ensuring that clinical risk is contained within acceptable limits.

Initially the Trust is running a first-phase pilot using a limited set of documents. The process of identifying the correct and approved versions of all documents that require shared access has been painstaking. However the ultimate benefits far outweigh the implementation effort and SpectrumITech has been available and willing to help every step of the way.

"Our requirements were clear from the outset," explains Mr. Burke. "SpectrumITech translated our vision into a realistic, working solution that we can depend upon. Once the system has been extended to all departments, Trust staff can be secure in the knowledge that they have instant access to the correct version of every policy and procedure document relevant to their work, at the touch of a button. The Trust will have even greater confidence that appropriate disciplines are being followed, and our ability to meet statutory obligations relating to clinical risk will be unquestionable. All in all this will help us to continue focusing on patients, not administration."

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Hospital Trust

