



**Professional
Record
Standards
Body**

Document naming standard

FACT SHEET

Why do we need a document naming standard?

The NHS has a million patient contacts nearly every day and these contacts generate information. While more of that is being recorded in digital record systems, much is still held in documents that are contained in care records. Add in social care information and document numbers increase significantly.

People with complex health and care histories can easily have hundreds of documents in their health and care records which may need to be retrieved urgently in order to provide on-going care.

In most of our hospitals and community-based health and care services (i.e. excluding primary care) there is no single source of a care record. The record is a mix of paper and digital information spread over many computer systems.

Documents are one of the most common ways of sharing information. So it is essential that documents – both digital, scanned paper and historic ones – are named in a standardised way so that they can be located easily in digital systems to support safe, efficient and effective care.

Putting time and effort into naming documents consistently and logically will distinguish similar documents from one another at a glance, and by doing so will facilitate their search and retrieval and enable users to browse file names more effectively and efficiently. Naming documents according to agreed standards should also make naming easier for colleagues because they will not have to 're-think' the process each time.

The aim of the project was to develop a single national standard and guidance for the naming of digital health and social care documents, which recognises existing naming standards already in use in Scotland and internationally.

What is the document naming standard?

In order to be able to 'find' these documents easily, whether paper documents scanned into digital documents or newly created documents from dictation or outputs from health or social care systems, they **MUST** have a name and they **MUST** be identifiable.

The PRSB document naming standard specifies the way that the name of a document should be structured so that people or care professionals accessing care records can find it easily, anywhere. It can be a single item that is coded using SNOMED CT, thus making it searchable. There is a pre-existing list that should be used to select the document name, published by NHS Scotland and available online.

The 'document name' is only one piece of information recorded about a document and only one way of searching for and identifying it. It should be viewed as part of a much wider set of details used to describe a document. Other information needs to be held about a document to enable it to be easily located.

For example a discharge letter from an orthopaedic service should be 'named' as a discharge letter (part of the 'correspondence' content) and the specialty is orthopaedics. Additional tags will be added e.g. author and date, hospital/clinic and speciality services and so on.

If you imagine when every document is appropriately tagged this will allow professionals and people accessing care to assemble the digital record into a navigable structure.

E.g.

- *I want to look at letter that X dictated.*
- *I want to look at letters done in orthopaedics.*
- *I want to look at all letters.*
- *I want to look at discharge letters.*
- *I want to look at all orthopaedic discharge letters.*
- *I want to look at all Orthopaedic Discharge letters that X dictated.*

Using the standard

The PRSB document naming standards builds upon existing naming standards.

PRSB believes that document naming should be mandatory and use published lists including the NHS Scotland Document Indexing Standard and the NHS Data Dictionary as well as SNOMED CT to ensure documents are searchable.

Naming conventions should clear and unambiguous so that any user – whether a patient, clinician or administrator – can easily retrieve documents. The document naming standard should apply to scanned paper notes as well so that these documents are as accessible as fully digital records.

Resources

For links to the standard documentation and more resources, please visit [The PRSB website](#)