



# STB 48 SPECIAL PATIENT NOTES

**NAME:** \_\_\_\_\_ (PLEASE PRINT CLEARLY)

**DATE OF BRIEFING:** \_\_\_\_\_

**BRIEFED BY:** \_\_\_\_\_

## STB 48: Special Patient Notes

The purpose of this Service-Training Brief is to assist us in the service we provide to our customers.

The Training Team/Co-ordinator is responsible for delivering this brief to staff. Please sign the front page of the brief, this will then be kept in your training file and the information recorded on Badger systems. The brief content pages may be kept for reference as required.

The information contained in this brief supersedes all previous communications, manuals or procedures.

<b>STB 48 – Special Patient Notes</b>	<b>Signed</b>
I have received a face to face briefing	
I fully understand the briefing and will implement this training.	
I have discussed any queries.	

### VERSION CONTROL

<b>DATE</b>	<b>CHANGE</b>	<b>CHANGED BY</b>
05.02.13	Original Version	Training Dept
08.10.15	Call Centre Manager changed to Training Department	CY
14.12.15	Training dept changed to Training Manager	CY
24.07.18	Reviewed	SBi

**INTRODUCTION**

During office hours we receive special patient notes by fax, these are entered onto the Adastra system by the Receptionist. When the surgeries are closed the Team Leader/Team Leader Assistant will enter the notes onto the Adastra system. It is important that the fax machine and tray is checked on a regular basis to ensure all notes are entered onto the system swiftly.

All the faxes that are received are filed and reviewed on a yearly basis to ensure patient details are up to date. Surgeries that have the Adastra web access are able to enter patient special notes directly onto the system.

**CASES WITH SPECIAL NOTES ATTACHED**

When searching for a patient – any highlighted in green will have some form of special notes attached.



Receive a Call

30-Jan-13 11:50:59 GMT 30-Jan-13 11:51:10 GMT Defer

**Patient lookup**

Surname Phone Number Postcode Date of Birth NHS Number  Requires al

test Search

Drag a column header here to group by that column

Surname	Forename	Address	Home Phone	DOB	Sex	Match Type
Test	Badger Member	Badger House 121 Glover Street Birmingham Wes...		01-Aug-79	Male	Exact Match
Test	BEN	Badger House 121 Glover Street Birmingham Wes...	000000000000	01-Aug-79	Male	Exact Match
Test	Bill	12 Sudeley Tamworth Staffordshire B77 1JR	01827 251050	06-May-58	Male	Exact Match
Test	Call	18 Katie Road Bordesley Green West Midlands B2...	0121 693 4000	27-Mar-66	Female	Exact Match
Test	Fay	MAIN STREET DISNEY B4 6NH	0121 693 4100	21-Jun-80	Female	Exact Match
Test	First	Bottom Lodge Goscote Lane WALSALL W53 15J	01922 800100	01-Dec-54	Male	Exact Match
Test	Hallima	Aston Pride Community Health Centre 74 Victoria ...		03-Nov-76	Female	Exact Match
Test	Joe	69 Reservoir Road Burton On Trent Staffordshire...	01922 602610	22-Jan-88	Male	Exact Match
Test	Ken-Test	35 Summer Hill Road BIRMINGHAM B1 3RB	0121 123 4567	01-Jan-01	Male	Exact Match
Test	Lynne	3 Prospect Lane Solihull West Midlands B91 1HJ	0121 693 4100	17-Apr-54	Male	Exact Match

When a patient's record is selected the note will be displayed (as below) tick the box and select ok. If it is a free form note and not relevant to this particular patient (it could just be linked to the address, for example) then click cancel.

**Special notes...**

adast

Select matching notes...

Selected	Review Date	Match description	Test note.
<input checked="" type="checkbox"/>	21-Nov-09	Direct to patient	
▶ Test note.			
<input type="checkbox"/>	01-Jan-11	Free-form note match:	
Do not take calls for this ghost surgery.			

When the case is on the system the 'Notes' button will be highlighted in orange. The notes can be accessed by clicking on this button.

The screenshot shows a patient record interface. At the top, there's a 'Receive a Call' header with a timestamp of '30-Jan-13 12:04:38' and a 'Defer' button. Below this, there are tabs for 'Demographics' and 'Details'. A search bar contains 'C' and 'Call'. A 'Notes' button is highlighted in orange, with an arrow pointing to it from the text above. Other buttons include 'Unlock', 'Script', and 'Test entry'. The patient's details include: Forename 'Call', Surname 'Test', Sex 'Female', DOB '27-Mar-1966', and Age '46 years'. There are sections for 'Contact' (Home, Mobile, Other, Cur. Loc, Return Phone) and 'Home' (Current Location) with address fields: '18 Katie Road', 'Bordesley Green', 'West Midlands', and 'Postcode'. A 'Caller' section includes a checkbox for 'Caller is patient?', 'Name', 'Relationship', and 'Contact Phone'.

**TYPES OF NOTES**

Notes can be specific patient notes and therefore will be fixed to the patient record or they may be set up as free form notes attached to specific identifiable demographic details e.g. telephone number or address.

**READING SPECIAL NOTES**

You **must** pay attention to any special notes that are attached to a patient that you are selecting and take the time to read the details. Information contained in these notes may be relevant to how you deal with this call e.g. 'patient does not wish to go into hospital' in the event of a terminally ill patient. In this instance advising 999 or A&E would not be appropriate.

Special patient notes are there to assist everyone in ensuring the patient gets the appropriate advice/care that is needed. If you are ever unsure on how to proceed with a case that has special notes attached you should seek advice from your Team Leader/Team Leader Assistant.