

Title	<b>SYSTEMS USED FOR SPECIAL NOTES</b>			Number	<b>A07</b>
Effective From:	17.09.10	Duration:	No end date	Review:	01.04.2025
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Other Ref:					
Contacts:					

## Version Control

(Only last 3 versions, earlier versions can be found in the appropriate Archive directory for the document)

<b>DATE</b>	<b>CHANGE</b>	<b>CHANGED BY</b>
19.05.16	Reviewed, no change	PM
10.04.19	Reviewed, no change	AS
11.04.22	Reviewed, no change	AS

## Introduction

During office hours we receive special notes by fax, these are entered onto Aadastra system by a member of the Ops team. When the surgeries are closed faxes are passed onto the Duty Team Leader to put on the system. 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 Aadastra web access are able to enter patients special notes directly onto the system.

## Training Staff on Special Notes

Clinical staff receive training on special notes from the Clinical Director of Medicine. Non clinical staff receive training from a trainer they follow the special notes training guidelines which are included in their training manuals. All staff complete test calls before being signed off.

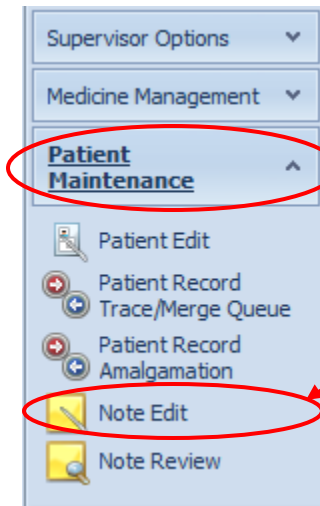
## Special Patient Notes Guidelines

### Overview

The Note Edit module allows you to create and maintain Special Patient Notes. This module has two tabs called 'Patient Note Search' and 'Free Form Note Search'.

## Using Note Edit

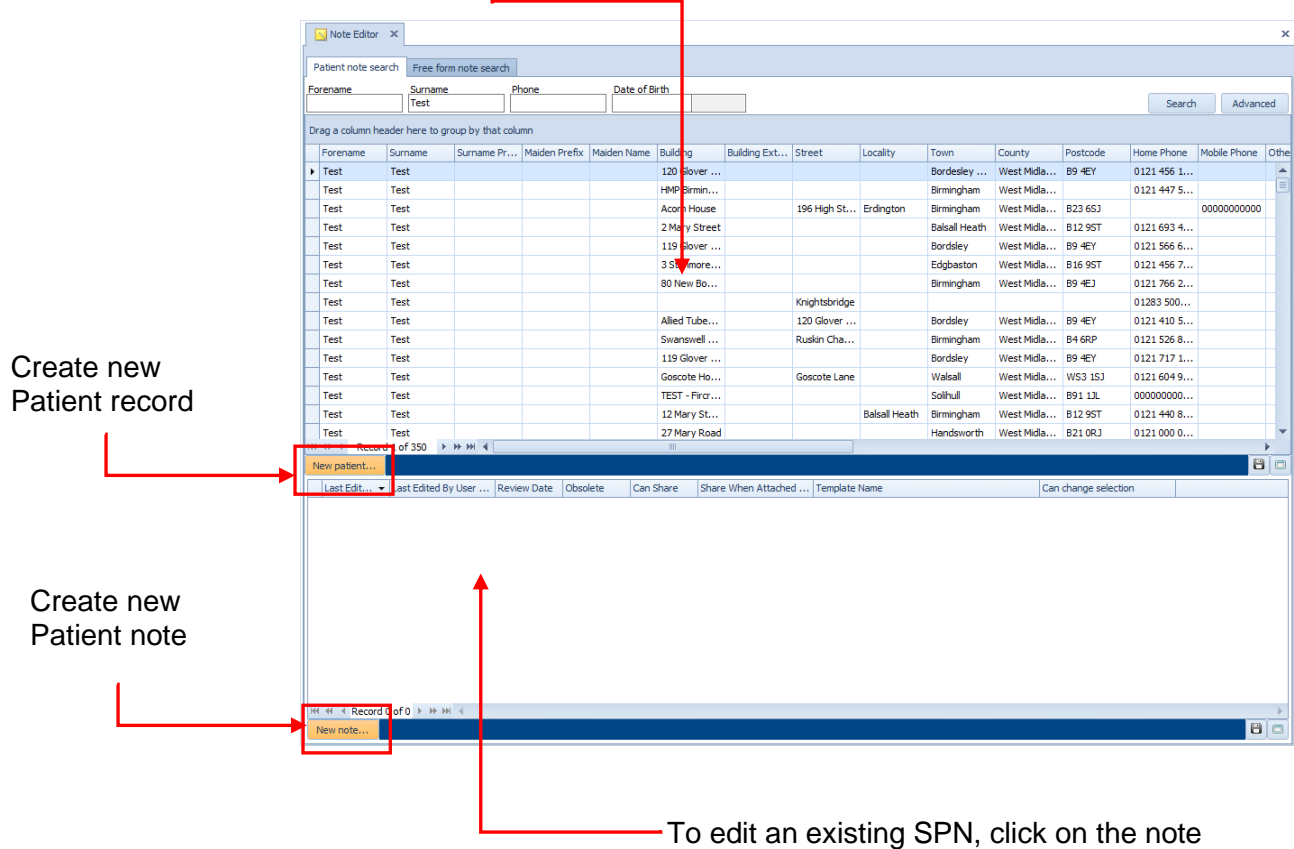
Click and open the *Patient Maintenance* Module and then click on *Note Edit*



## Patient Note Search Tab

- There are four criteria that you can use to search for a patient; Forename, Surname, Phone Number, DOB. (Forename cannot be used alone). Enter details into the search fields and click onto the 'Search' button. The search results will then be returned.
- To add a Special Patient Note for a specific patient record, ensure that the record is highlighted by clicking on it and then select the bottom 'new' button. (if a record is shown in green, it already has a SPN attached to it and you can view those notes at the bottom of the page).

If you want to view a patient record in database search, then double click on the record.



**NOTE:** There are two 'New' buttons on this screen. The top one will create a new patient record and the bottom one allows you to create a new SPN for the selected patient as shown above.

The Smartcard is used with the look up facility, this ensures the information is up to date and accurate.

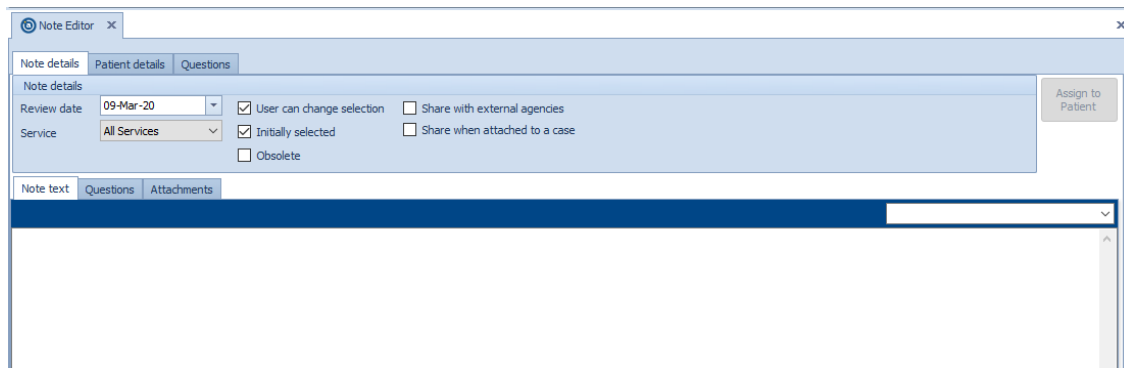
Once you have clicked the new button, you will be taken into the Note Editor screen. From here, you can edit one of the existing notes by selecting it, double click and then edit.

Within Note Editor there are two further tabs;

### Note Details Tab

- When creating a new SPN you will need to set a review date, the default is set to six months.
- There are five checkbox options available on this screen;

- **User can change selection** – this sets whether the user can attach or detach the note when the matching screen is displayed in Case Entry. This is checked by default and should always be checked when adding a FREEFORM NOTE.
- **Initially selected** – this sets if the note starts as ticked when the note matching screen is displayed.
- **Obsolete** – This set is the note is obsolete or not, however the case may be.
- **Share with external agencies** – this sets whether the SPN can be shared with other agencies. Select to share the note with 111.
- **Share when attached to a case** – this sets whether the note is seen by 111 if Nurse Assessment is being used by the site.
- Within the Note Editor tab, there are three further tabs; Note Text, Questions & Question.
  - Note Text is where the SPN details are entered. (Free text)
  - The Questions tab can be used to record answers to a specific template of questions. You select the template that you wish to use from the drop down list and fill in the details as appropriate.



The screenshot shows the 'Note Editor' window with the 'Note details' tab selected. The 'Review date' is set to 09-Mar-20. The 'Service' is set to All Services. The 'User can change selection' checkbox is checked. The 'Initially selected' checkbox is checked. The 'Share with external agencies' checkbox is unchecked. The 'Share when attached to a case' checkbox is unchecked. The 'Obsolete' checkbox is unchecked. There is an 'Assign to Patient' button on the right.

**NOTE:** If a template has been selected and information has been entered and then the user selects another template from the drop down a warning will appear and the information in the originally selected template will be copied into the note text so that it is not lost. The template questions and their answers will be viewable in v2.

Once all the details of the note have been added click 'OK' to save the note.

**NOTE:** The SPN that you have just added will not show at the bottom of the screen until you re-search the record by clicking on the search button.

## Patient Details Tab

- Provide information on Patient Demographics and Doctor Details. You can edit these details from here.

## Freeform Note Search Tab

- There are a number of search criteria for freeform notes which are; Forename, Surname, Phone Number, DOB, NHS number, Postcode, Address, Provider and Provider Group. You can also choose as to whether to include obsolete records. Click Search.
- If any information is added into the fields in one tab (patient note search or freeform note search) it will automatically be copied into the fields in the other tab.
- If there are any freeform notes that meet the search criteria they will be displayed in the bottom section of the screen.

### **IMPORTANT – Free form Note Matches**

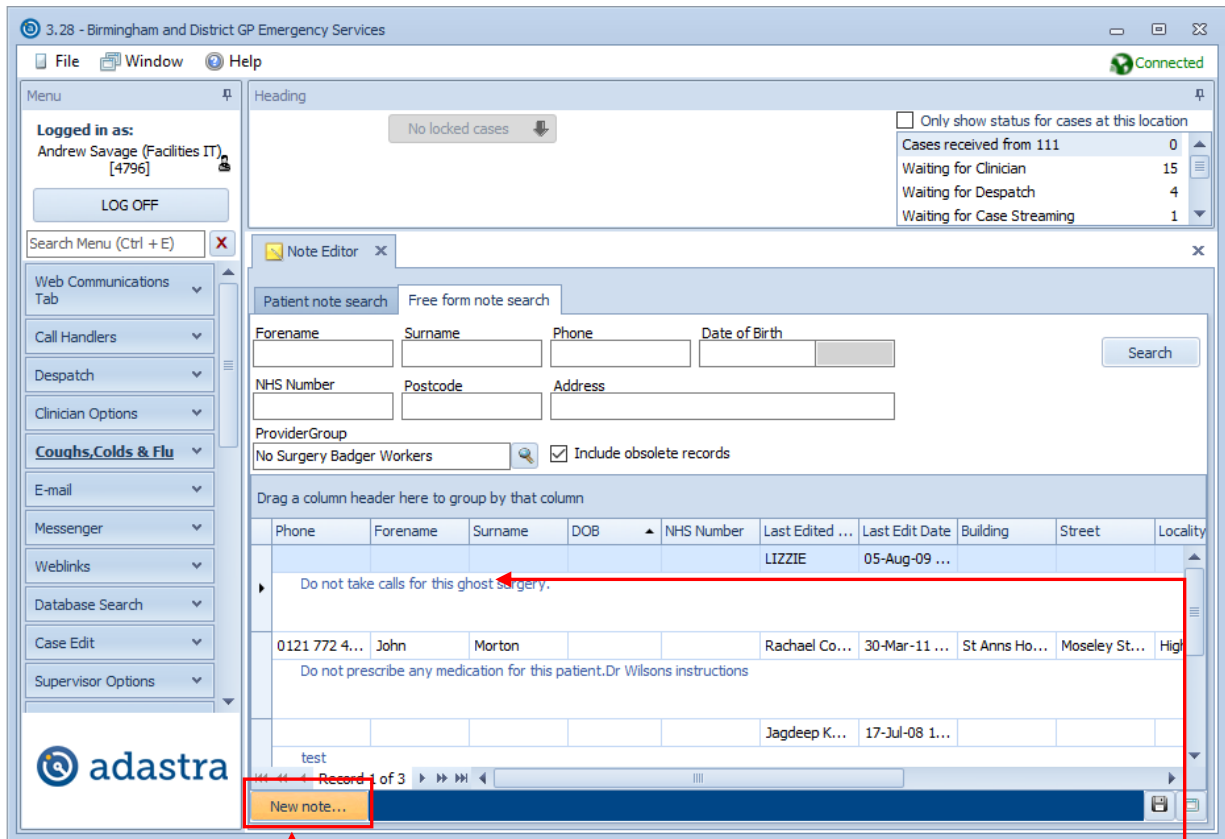
Please note that the following changes have been made to the way free form Special Patient Notes match.

If a free form note matches the patient record on either a date of birth OR a phone number OR a surname OR a postcode then, as long as there is no provider/ provider group information attached to the note, it is presented as a potential note. (If there is a provider/provider group then this MUST also match for the note to be considered a match).

This is different to previous versions where ALL the fields populated on the note had to match the patient for it to be presented as a potential match.

The reason for the change in logic is because a free form note should either be specific to one particular piece of information (e.g. a phone number for a nursing home which advises the doctor to park at the back of the house and use the back door), or a note for a patient who gives false information. (e.g. you could create a free form note with the patient's name, date of birth, postcode and phone number – then when taking a call you only need match one of these pieces of information in order for the note to be presented as a potential matching note.)

As free form notes will now match any of the key fields mentioned above; DOB, Phone Number, Surname or Postcode, we suggest that you DO NOT use surname as the sole criteria when searching for a patient record in case entry.

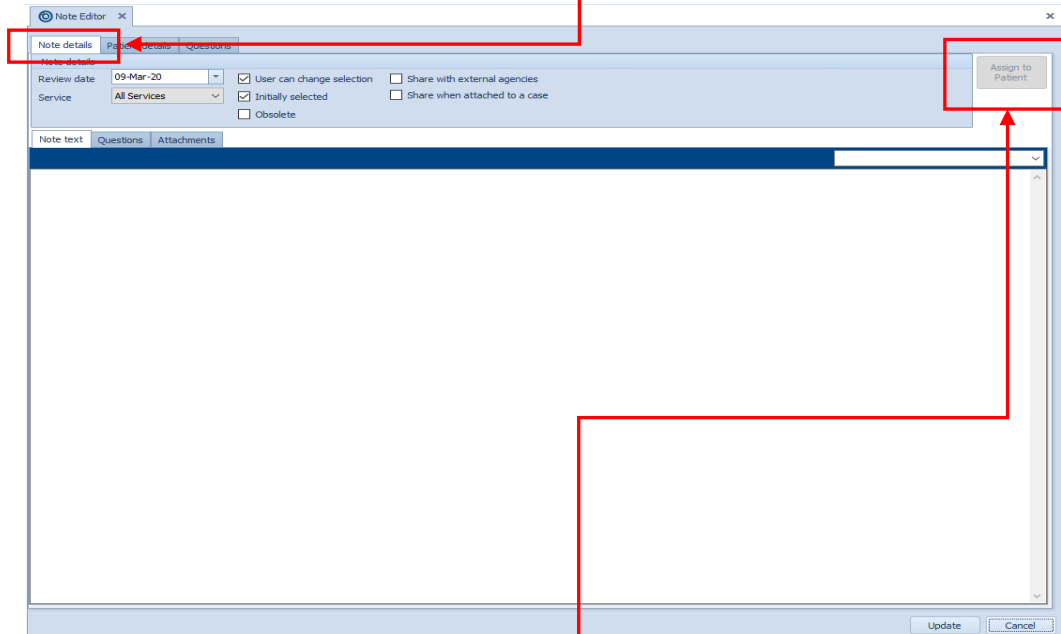


- To create a new freeform against your search criteria click the 'New' button. This will take you to the Note Details and Demographic tabs.
- To edit a freeform note that already exists, double click on the note.

To create a new freeform against your search criteria click the 'New' button. This will take you to the Note Details and Demographic tabs.

To edit a freeform note that already exists, double click on the note.

The notes details tab is the same as when creating a patient note. Insert free text.



The 'Assign to Patient' button can be used to transfer a freeform note to a specific patient record. Effectively the note becomes a specific patient note rather than a freeform note.

**NOTE:** Notes that are created in v3 cannot be edited in the legacy system (Aadastra v2).