

Module 2

DATA ENTRY

Training Manual

Name of Employee: _____

Date of Training: _____

Trainers Name: _____

Date Training Completed: _____

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1 Introduction

Please keep this guide with you on every shift until you are fully confident in dealing with these cases and are able to work with minimal supervision.

- Your Smartcard and your Aداstra login details are essential for you to carry out your work in the Call Centre. If you do not have a Smartcard or have not been issued login details for Aداstra, please inform the Team Leader(s).
- On shift, you will need to report to the Team Leader in the Call Centre.
- This manual is to supplement a face-to-face briefing and ongoing on-the-job support.
- On the login page when accessing Aداstra, please ensure that you enter the system using the location 'Glover Street'.
- At the end of your end of your shift, please let the Team Leader or Team Leader Assistant know if there are any cases that require a handover.

2 The role: Data Entry

The purpose of this role is to convert self-referral calls from the worklist into an Aداstra case.

Our centres

Aston Bourne Road - Green and Hot Centre

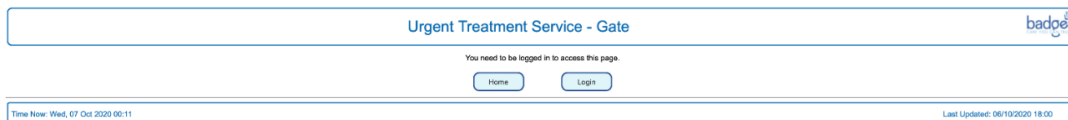
Erdington Stockland Green - Green and Hot Centre

Hurst Lane - Green and Hot Centre

3 Self-Referral Worklist

Step 1: This worklist is for all referrals made by patients directly themselves.

To access this work list, the UTS staff member based at Aston Bourne Road will access the UTS website using www.drivethrucare.uk/uts_gate.php. The user will be presented with the log in screen. To access gate, select Login button.



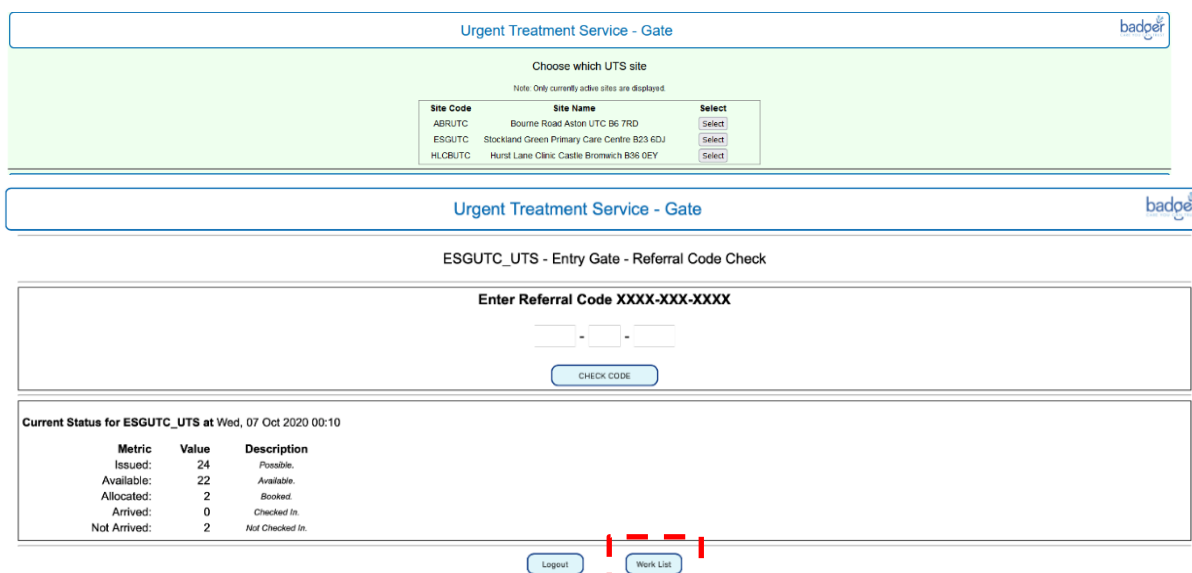
To access, use the follow login credentials:

Username: **BUTCDATA**

Password: **Please ask the Team Leader**



Step 2: Once you have logged in, you are shown a screen with a selection of Badger locations as part of the UTS Gate. It does not matter what location you choose to log in with.



Step 3: Once logged in and having chosen a location, you are presented with the main screen which informs you of the status of booking slots available. To access the self-booking list, select the work list button on the right.

Step 4: The work list screen will initially open on today's schedule, however options are available to look at yesterday's and tomorrow work list too. In the exercise, we will only require the self-booking case for today. When a patient completes self-referral, their details appear in this list

NB: Forename/Surname/DoB/Mobile number have been hidden on screenshot.

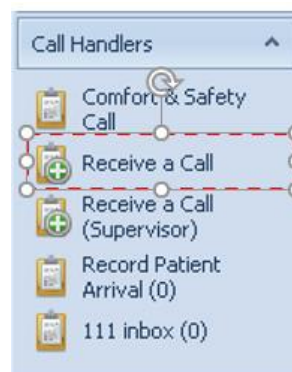
Urgent Treatment Service - Worklist										
UTS worklist for ESGUTC_UTS on Thu 15/10/2020										
Copy	AdAstra	Reference	Forename	Surname	DoB	Mobile	Booked	Slot Time	Arrived	History
+	OK	1510-939-1830					Wed 14/10/2020 21:44	Thu 15/10/2020 11:30		back pain on right side bottom of ribs

Gate Print Yesterday Today Tomorrow Logout

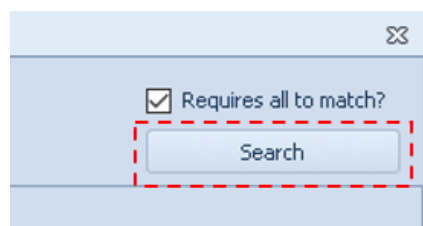
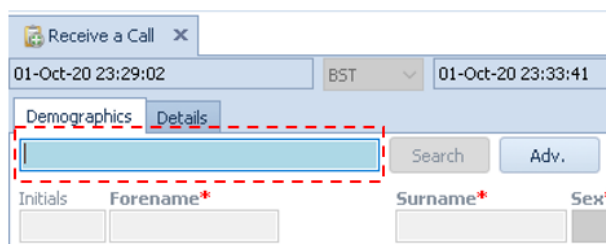
Time Now: Thu, 15 Oct 2020 08:33 Last Updated: 12/10/2020 22:00

Within your role as a Call Handler, you are expected to filter out cases that have not been added to Adastra (identified by a '+' under the 'Adastra' heading in the Worklist; the example shown has already been actioned and so displays 'OK'.)

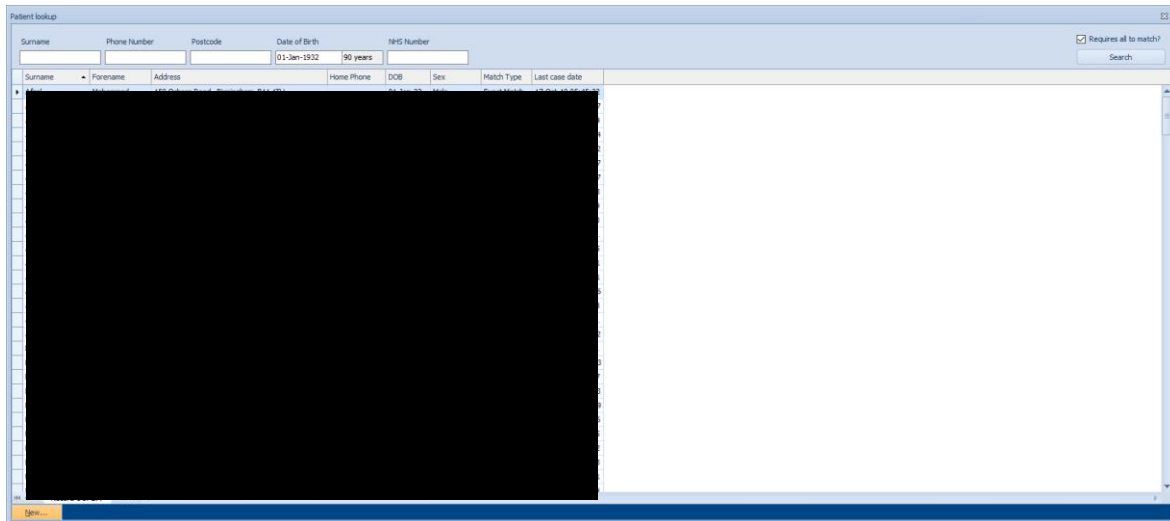
Step 5: Open up Adastra on second monitor and select 'Call Handlers' options, then 'Receive a Call' (as per standard).



Step 6: Choose the case you want to input onto Adastra using UTS work list information on adjacent screen. To search initially on Adastra, use the patient Date of Birth on the Worklist (location to enter DOB shown in red in the first screenshot below) and enter details on to the search option on Adastra (example 10091977) and select 'Search' on right



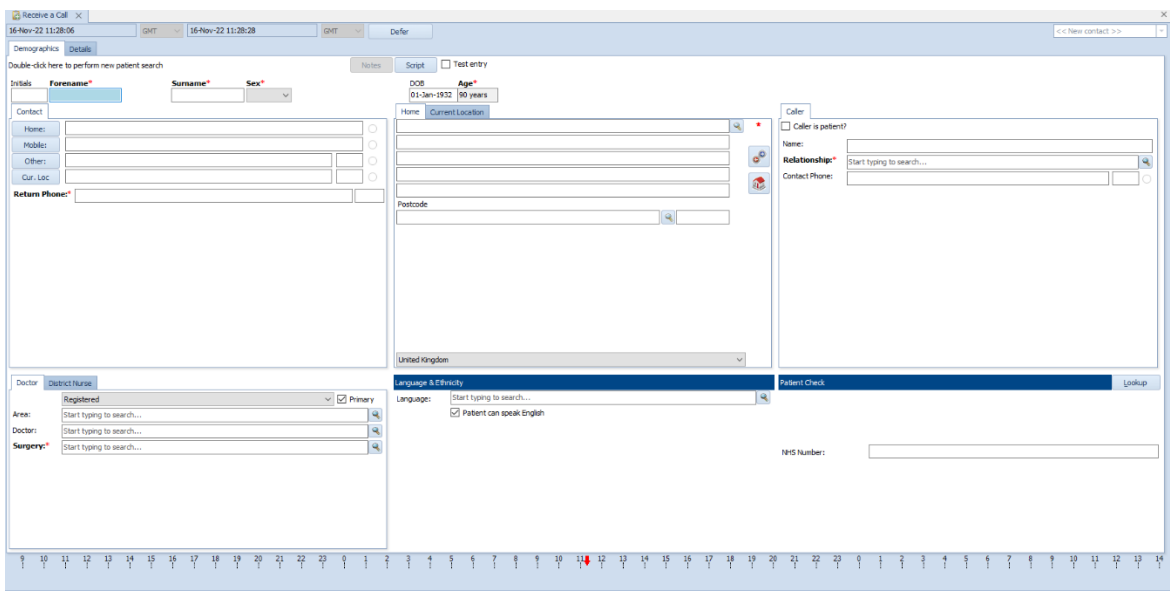
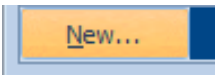
After pressing 'Search', you will be shown a screen with lists of patients and their details. Patient information in the following screenshot has been redacted.



Step 7: Using the patient's name, locate patient on list shown in Adastra and double click. This action will open the demographics screen.

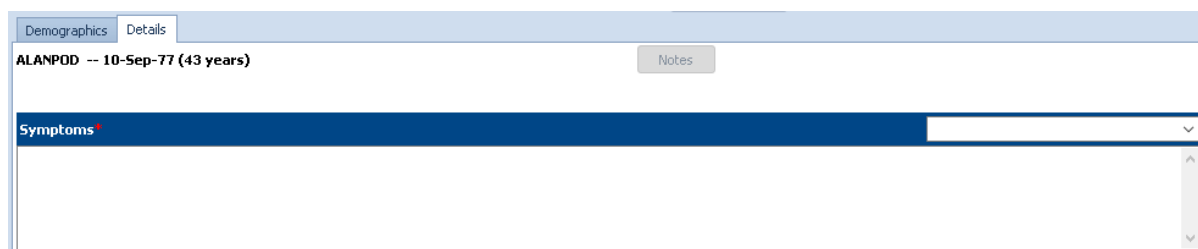
Important: Ensure you are logged in with smartcard and run PDS spine trace on patient.

If the patient's details are on the 'Patient Lookup' list, then proceed to **Step 8**. If the patient's details are not found by the system, you will need to press 'New...' at the bottom of the page. You will then need to fill out the patient's information in the opened 'Demographics' window. Contact the patient via telephone and request the information to enter in the available spaces in the 'Demographics' window.



Step 8: Check patients details on Adastra with information on 'Work List'. Ensure that telephone numbers are matching. You will need to contact the patient via telephone to confirm the patient's details (identity of patient, surgery etc.).

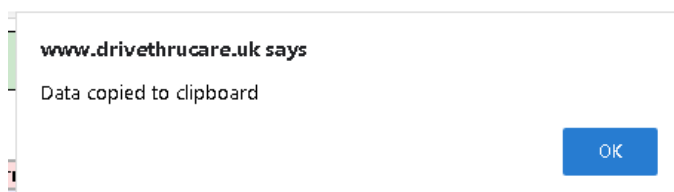
Step 9: Select 'Details' tab on Aداstra



Step 10: Moving back to the UTS Worklist, select the '+' button in the 'Copy' column next to patient details you want to copy.

Copy	Reference	Forename	Surname
+	0110-094-3608	Test	TEST

A popup will appear indicating Data copied to clipboard.



Click OK in pop up box to close.

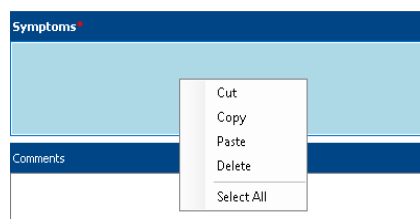
This action has copied the following patient information:

- Reference code
- Name
- DOB
- Mobile
- History
- Booked
- Slot Time

Information copied will look like the format below.

Ref: 3009-039-6275; Thor ODINSON (01/01/1997); Mobile: 07904536139; Hx: [Fever, cough]; Booked: Wed 30/09/2020 11:12; Slot: Wed 30/09/2020 11:20;

Step 11: The information stored in the clipboard will need to be copied into Aداstra symptoms box. To do this, access Aداstra patient details tab, click into Symptoms box (will turn blue). Right click on mouse and select 'paste'.



Step 12: Stored information in clipboard will be copied into symptom box.

Symptoms

Ref: 3009-039-6275; Thor ODINSON (01/01/1997); Mobile: 07904536139; Hx: [Fever, cough]; Booked: Wed 30/09/2020 11:12; Slot: Wed 30/09/2020 11:20;

Step 13: To book patient into UTC, select 'Store Call'.

Store Call

999

Store Call TC

Amalgamate

Sensitive

COVID19 Dispatch

Step 14: On 'Modified Case Type' screen, select T\Centre Nurse followed by the next button.

adastra

Modify Case Type

Case Type	Usage
A Dental	Patient to attend Treatment Centre to see a Nurse
CV COVID19	
V Home Visit	
AVS Home Visit AVS	
HVN Home Visit Nurse	
M MESSAGE SERVICE	
C MIU Cannock	
D OOH A&E Diversion	
PHE Public Health England	
R Reception Advice	
R Repeat Prescription	
S South District Nurse	
S South Staffs DN	
T T\Centre Doctor	
T T\Centre Nurse	
P Telephone Answering	

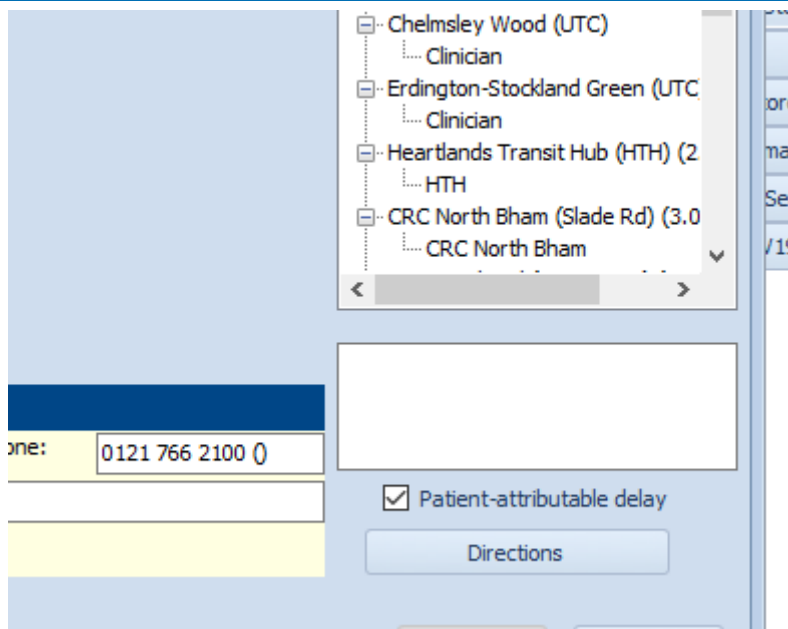
Next > Cancel

Step 15: Choose 'Routine' priority in 'Modify Priority' window followed by 'Next' button.

Priority	Usage
4 Routine	standard call
2 Urgent	
1 Emergency	

Next > Cancel

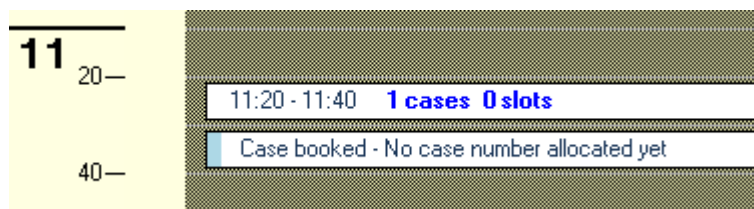
Step 16: On Schedule screen, select relevant treatment centre in the list on the right. Ensure you select the correct location & click 'Patient-attributable delay' (as shown).



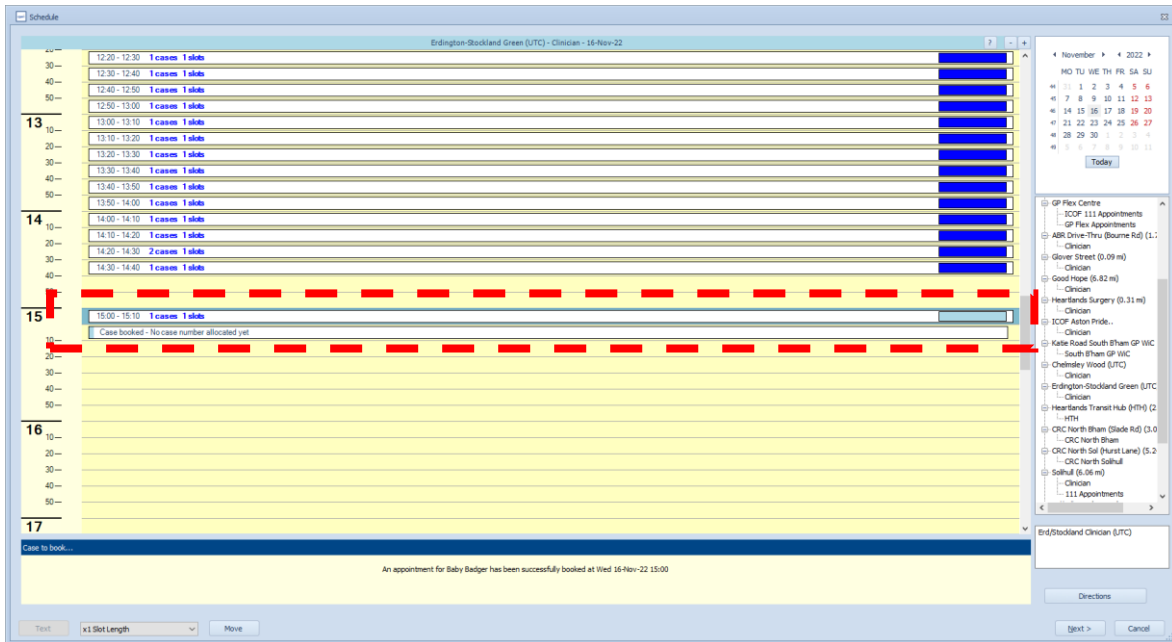
Step 17: The relevant appointment schedules will be shown on the left of the 'Schedule' window. The colour shows the availability of slots in the system. Personal details have been redacted.



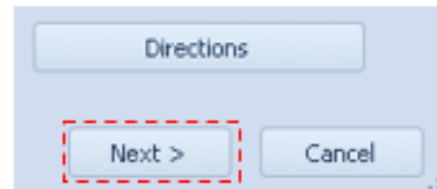
Step 18: Using the information copied across to symptoms at **Step 10**, for slot time (i.e. Wed 30/09/2020 11:20) obtain the correct appointment slot to book into schedule. Double click into appointment slot.



The patient will now be allocated an appointment slot time, as shown below.

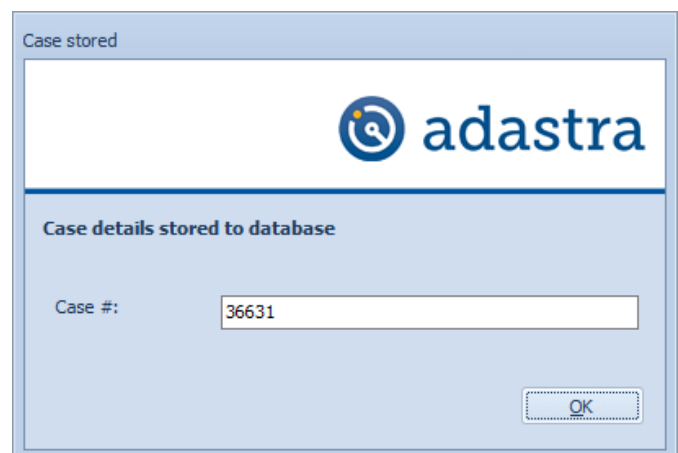


Step 19: Finally, click 'Next >' in the lower right-hand corner on the right to finalise the appointment.



NB: Dependant on the time of day/week the booking has been made, a pop up may appear warning you that the surgery is open. To progress, click the 'I have read and understood the above', then next.

A 'Case Stored' notification should appear to confirm that the case has been successfully stored.



Step 20: Finally, to log that you've added case on Adastra, got back to

https://www.drivethrucare.uk/uts_worklist.php and click on the '+' button under the 'Adastra' column for the patient added. The '+' icon will change to 'OK'.

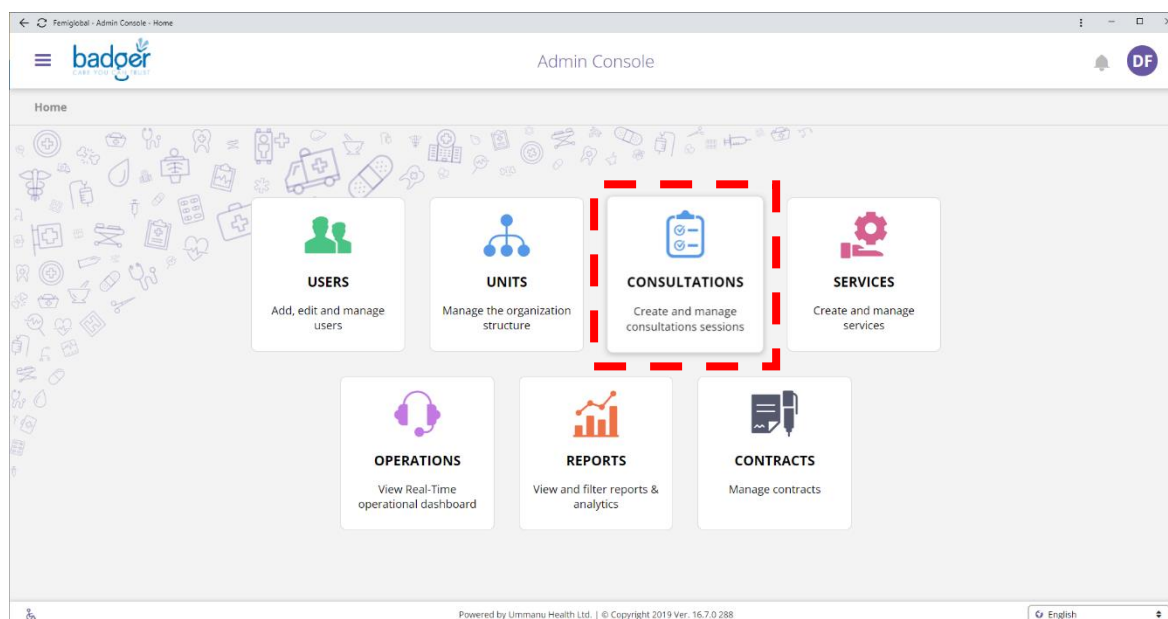
Please speak to Team Leader(s) if case is to be put on a new case or to be reopened if a UTS case.

4 Ummanu: Virtual Waiting Room

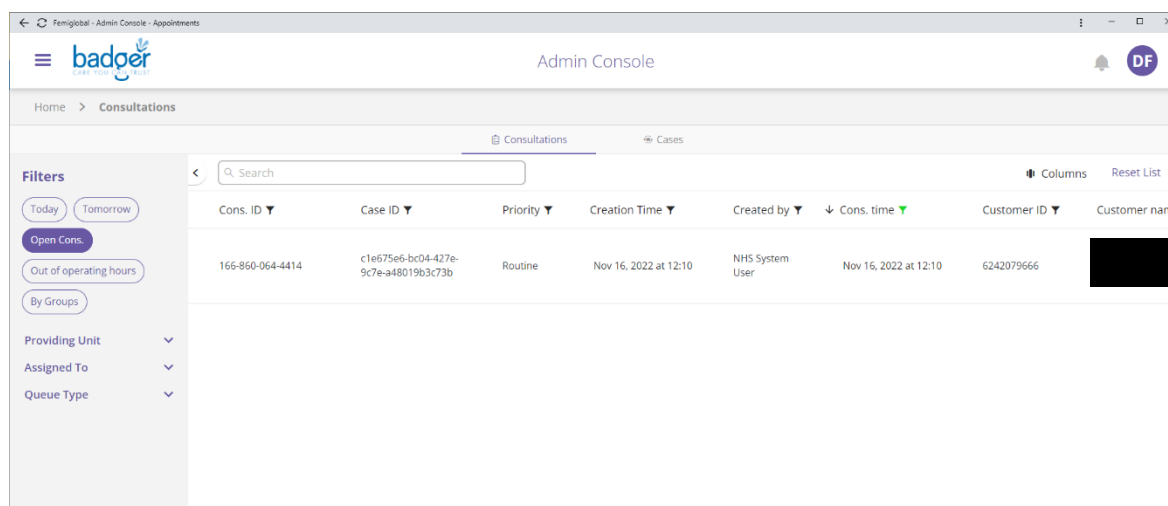
Step 1: Log into the Ummanu Virtual Waiting Room with your login username and password. If you are unable to access to Ummanu, or you have not been given login details, please see your Team Leader(s).

Step 2: Once you are on the main Virtual Waiting Room system site. Click on 'Consultations' to progress to the relevant section of the system.

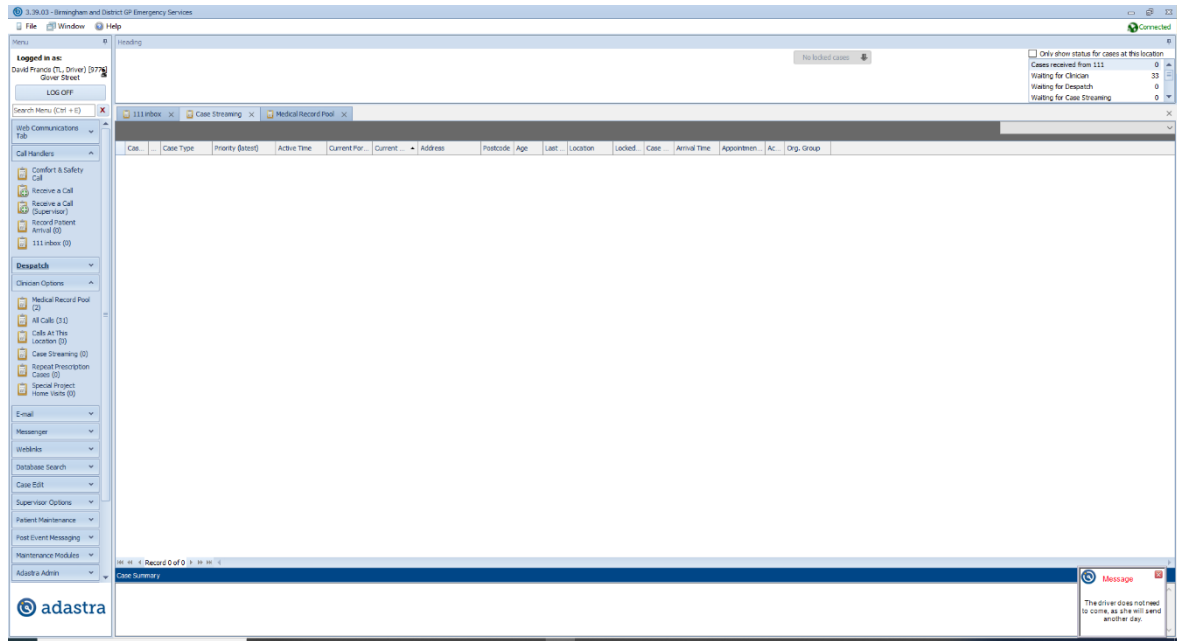
Please note: The following screenshot displays a Team Leader's view of the system. You will only be able to see the 'Consultations' section for selection within your role at Badger.



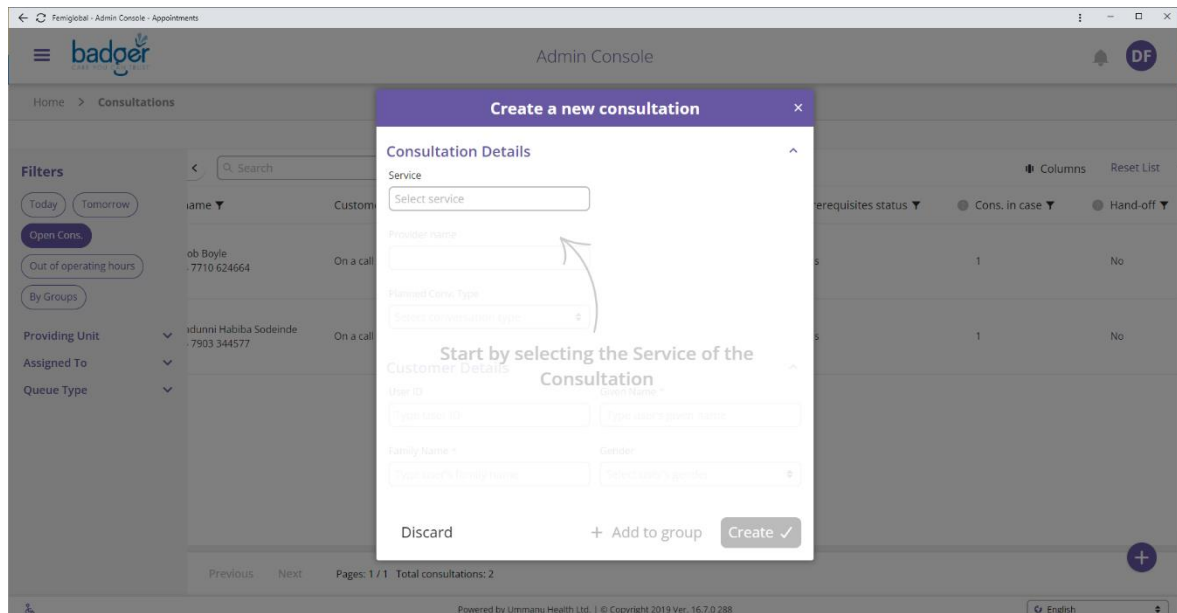
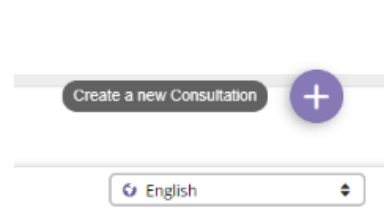
Once directed to the 'Consultations' section, you will be able to see a list of cases present in the system. Patient information has been redacted. This database is used by clinicians only.



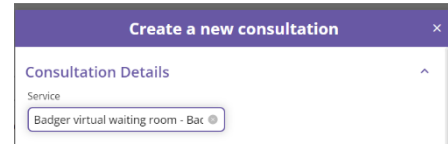
Step 3: When a case is in the 'Medical Records Pool, double click on the case. Using the information provided, you will now input this into the Ummanu Virtual Waiting Room system (VWR).



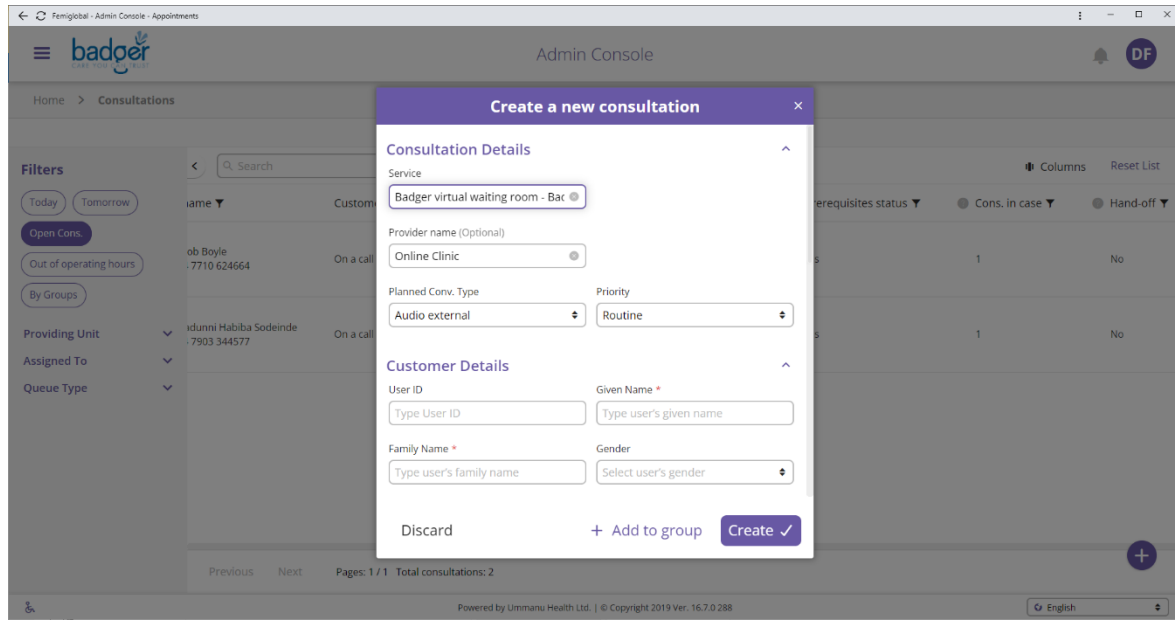
Step 4: Create a new case by clicking on the 'Create a new Consultation' button in the lower right-hand corner of the screen. This will open a window to allow you to enter the patient's details.



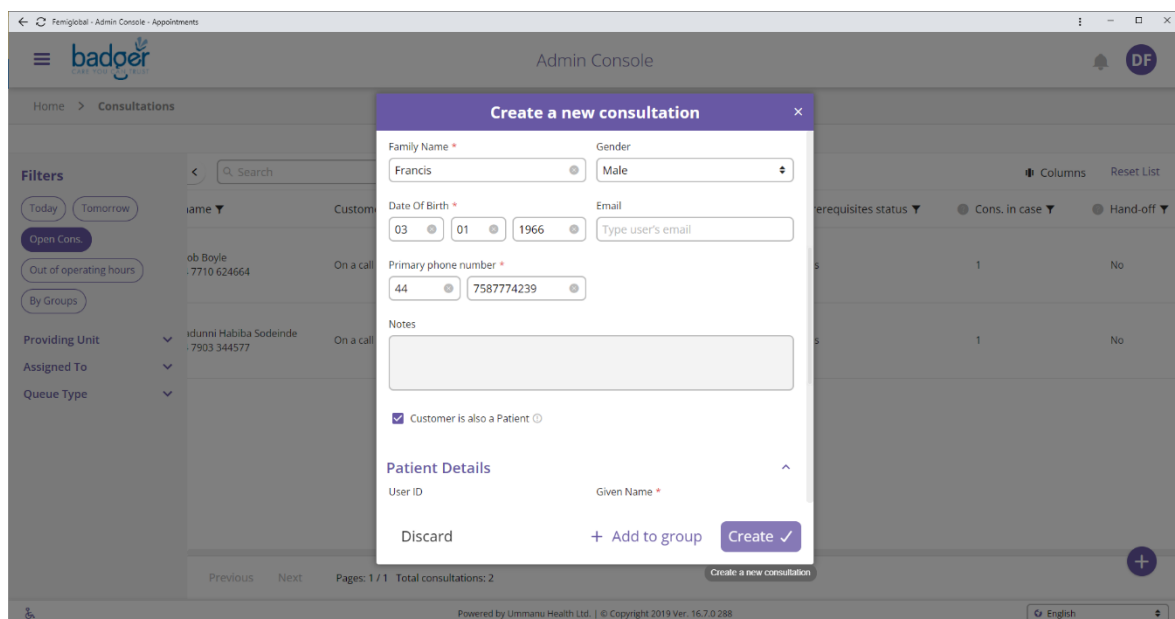
Step 5: In the first drop down selection under 'Service', select 'Bader virtual waiting room – Badger'.



Step 6: Having the case open, you need to check on the NHS Spine the patient details, and then input the details from 'Case Streaming' into the relevant boxes. The NHS number should be inputted into the 'User ID box'. You should also check the priority of the case.



Step 7: Once filled in, press the 'Create' button at the bottom of the window.



The case has been successfully created in the Ummanu Virtual Waiting Room (VWR) system.

5 System Fail Email

Overview

A case that cannot be received via Aadastra is received via System Fail Email. The Team Leader(s) is/are responsible for supervising this process.

Step 1 – Team leader

Email is saved in email folder after printing hard copy

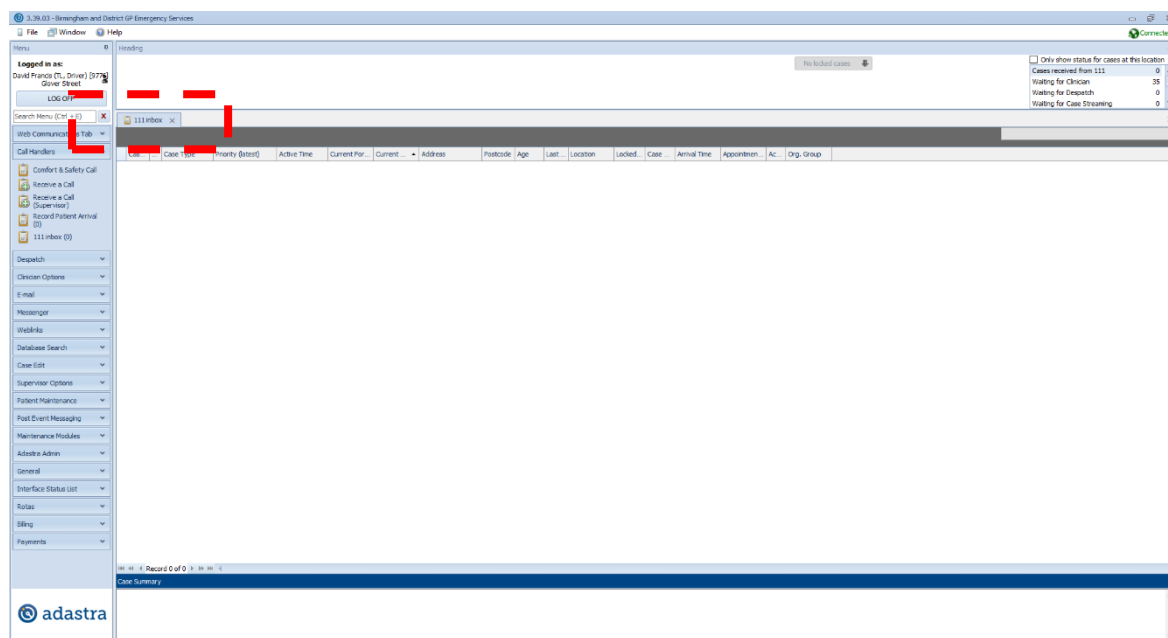
- 'Not Our Patient' cases – Contact NHS111 and return the case to them. If not contactable, ring patient and advise their details came to the wrong service and they should ring 111 again.
- Other cases - printed copy passed to DEC or Call Handler

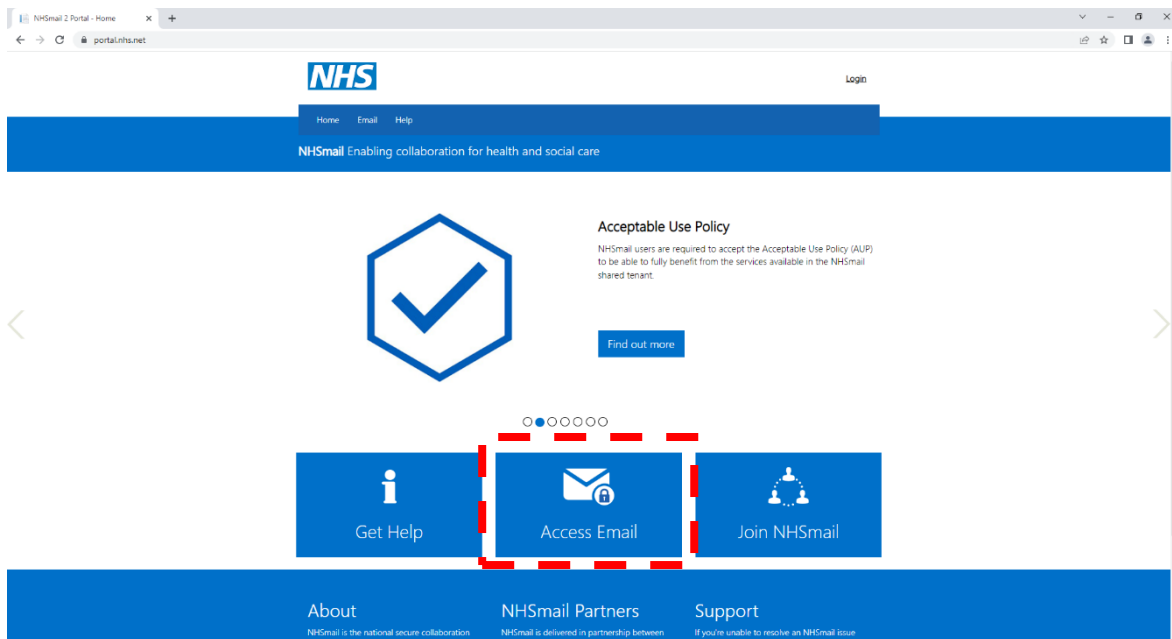
Step 2 – DEC/CH – create new case on Aadastra, send to Case Streaming and select 'Advice'. There are no other choices. Clicking 'Next' sends the case to the 'Medical Record Pool'. All cases have routine priority.

Step 3 – DEC/CH - create Ummanu Case in VWR with 'Routine' priority (Case in Aadastra 'Medical Records pool').

System Fail Email: Step-by-step

Step 1: Open the 111 Inbox in Aadastra, and log into the System Failure Inbox website. You can access this site by going to portal.nhs.net into the address bar. Then click on 'Access Email'.





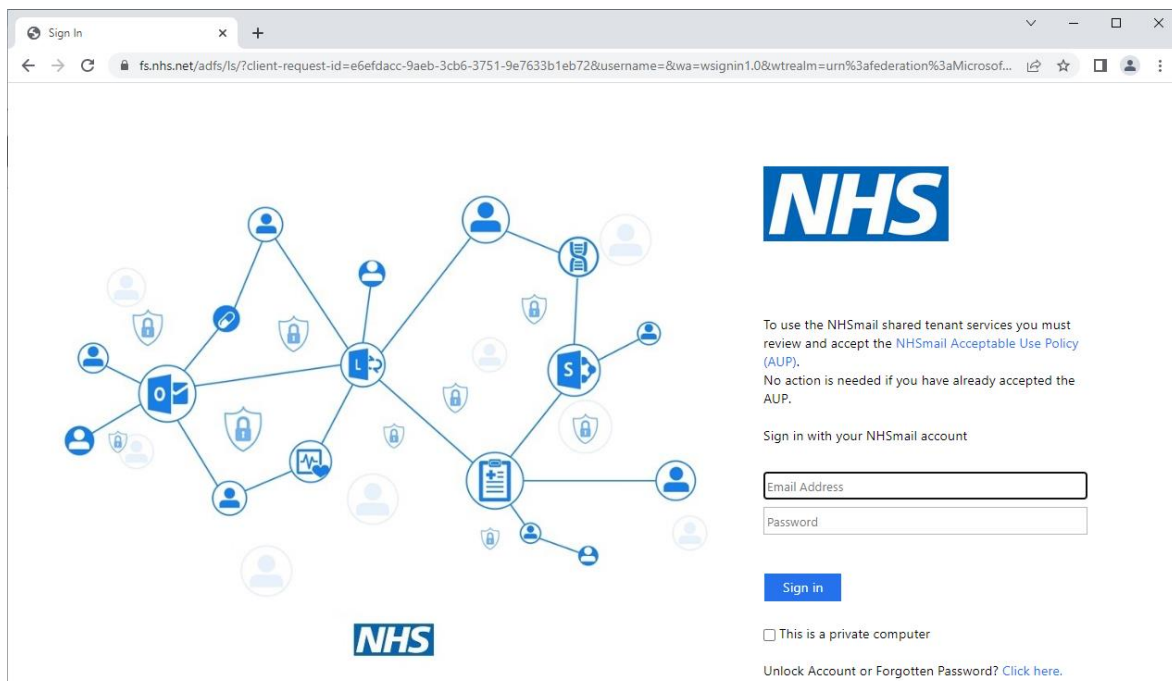
Step 2: After reaching the NHSEmail site and accessing the 'Access Email' page as shown in **Step 1**, you will need to log into the system.

The details are:

Username: badger.systemfailure.net

Password: *Please refer to your Team Leader(s)*

Enter the login details.



Step 3: In the inbox, you will see emails containing patient information and an attached cover sheet. Print the case details.

Step 4: Using the method shown in **Section 3**, enter the patient information contained in the email into Aadastra.

Please note: If a case in the System Fail Inbox is not in Ummanu or Aadastra, you will need to print the case, and then follow **Section 3** and **Section 4** to add the case into Aadastra and Ummanu.

Step 5: Once the case has been entered onto the Badger Aadastra system and put into 'Case Streaming', it will follow the normal OOH procedure. You may need to contact the patient to obtain further information if needed.

6 NHS 111

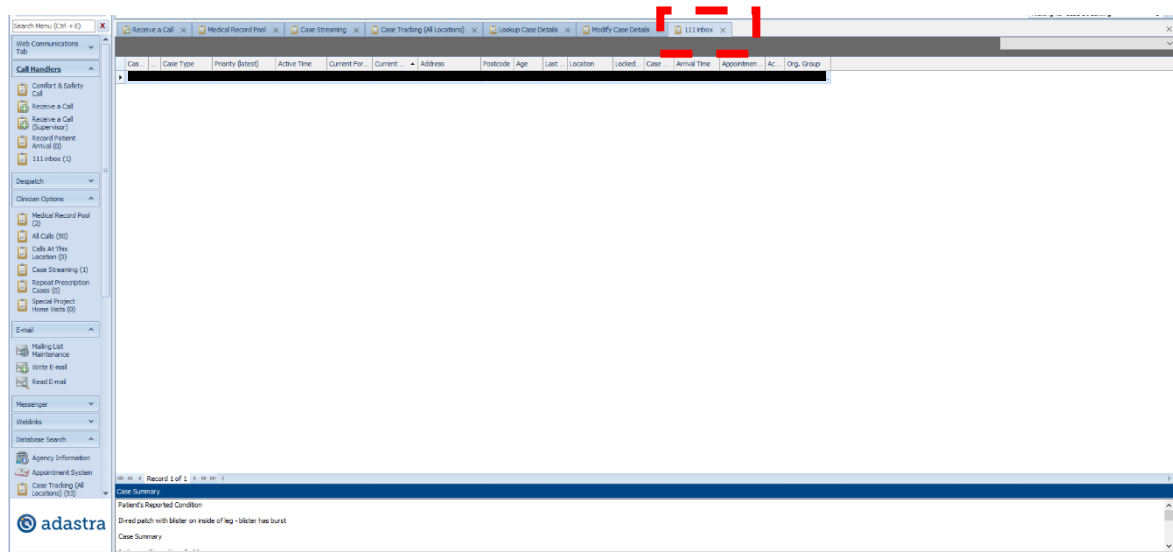
Cases from NHS 111 arrive on Adastra and at the same time automatically into the Ummanu Virtual Waiting Room (VWR). 111 Inbox operators should log into Ummanu (**Section 4**) and also open Adastra.

Step 1: Open Tabs

Open the 111 Inbox on Adastra and Case Streaming on another tab

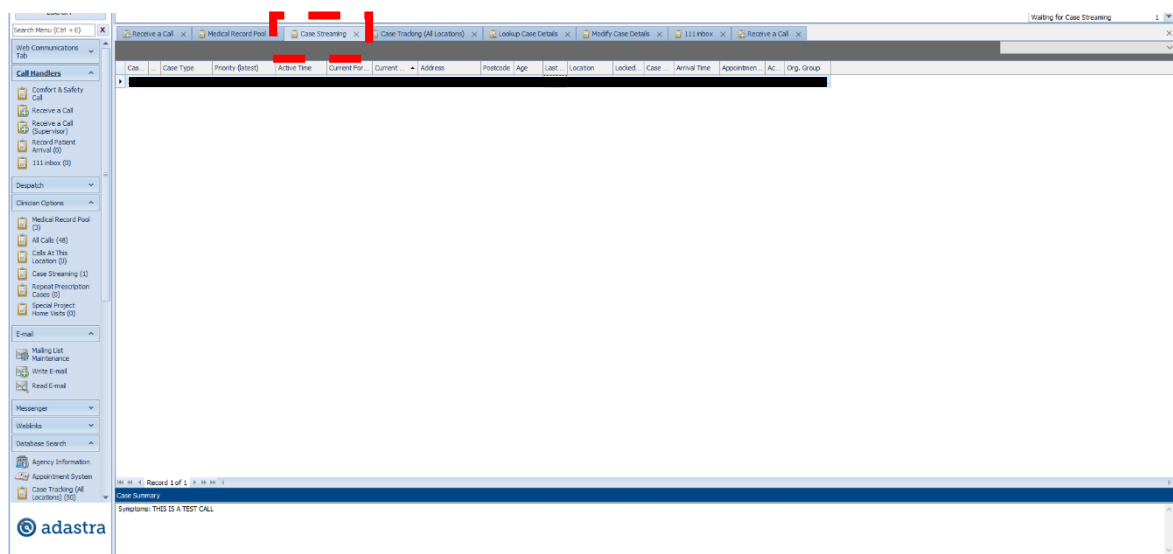
Step 2: 111 Inbox

Adastra cases arrive in the 111 Inbox. The inbox operator checks the case has an NHS number and if not, looks it up on PDS and enters it on the record. No other checks are carried out. All cases are sent to 'Case Streaming'. All cases should have the 'Routine' priority.



Step 3: Case streaming

On every case, the Inbox Operator selects 'Advise'. There are no other choices. Clicking 'Next' sends the case to the 'Medical Record Pool'. All cases should have 'Routine' priority.



7 Patient Interaction

When contacting patients during this process, it is essential that Booking Clerks state their name and the service they are calling from and why they are calling.

An example of good telephone etiquette:

“Good morning/afternoon/evening my name is and I am calling you from the Urgent Treatment Service regarding you booking for”

THEN: Confirm the date/time/location of the booking and obtain patient’s vehicle make, model, colour (if arriving by vehicle) – if the patient is arriving on foot, then this is not needed.

8 Notes

Please use this page to make notes within your training, write down questions and record any reflections or observations.

9 Sign-off

Module 2: Data Entry

Training Log

TRAINEE NAME:

Please use this log to record your training sessions with the Training Team Trainer or Clinical Lead for each Module.

Session	Date	Time	Trainer / Clinical Lead Name	Trainer / Clinical Lead Sign	Trainee Sign
1					
2					
3					
4					
5					

Training / Clinical Lead Sign-off

Please obtain signatures confirming that you are now able to work independently on this module.

Date: _____

Staff member (Full name): _____

Staff member signature: _____

Training / Clinical Lead (Full name): _____

Training / Clinical Lead Signature: _____

This Form must be returned to Glover Street FAO: Training Team