

Patient Administration System

Healthcare Contacts <HC1C>

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Patient Administration System (P.A.S) Course

1 GENERAL COURSE INFORMATION

COURSE TITLE	HEALTHCARE WIDE SCHEDULING - CONTACTS
METHOD OF TRAINING	Classroom
DURATION	3 hours
PRE-REQUISITES	PMI(1) - Add & Revise.

ABOUT THE COURSE

This functionality will allow you to record patients that have been referred to a specific service, clinician or an agreed generic area code, plus details of their contacts and the outcomes of these visits.

SUITABLE FOR

All Staff - Clerical & Clinical within a Healthcare environment

OBJECTIVES

This course will enable the student to:

1. State their personal responsibilities for Data Protection and the Caldicott Principles.
2. Log on and off of the P.A.S. system.
3. Find and select a Patient.
4. Record a referral.
5. Record contacts.
6. View episodes and contacts.
7. Revise referrals and contacts.
8. Use the delete functions.

2 INFORMATION GOVERNANCE

Information Governance (IG) sits alongside the other governance initiatives of clinical, research and corporate governance. **Information Governance is to do with the way the NHS handles information about patients/clients and employees, in particular, personal and sensitive**

information. It provides a framework to bring together all of the requirements, standards and best practice that apply to the handling of personal information.

Information Governance includes the following standards and requirements:

- Information Quality Assurance
- NHS Codes of Conduct:
 - Confidentiality
 - Records Management
 - Information Security
- The Data Protection Act (1998)
- The Freedom of Information Act (2000)
- Caldicott Report (1997)

Further information can be accessed through the Trust Intranet:

Information Governance (Departments sections), and
Management Policies (Policies section)

2.1 What can you do to make Information Governance a success?

2.1.1 Keep personal information secure

Ensure confidential information is not unlawfully or inappropriately accessed. Comply with the Trust IT Security Policy, Confidentiality Code of Conduct and other IG policies. There are basic best practices, such as:

- Do not share your password with others
- Ensure you "log out" once you have finished using the computer
- Do not leave manual records unattended
- Lock rooms and cupboards where personal information is stored
- Ensure information is exchanged in a secure way (e.g. encrypted e-mails, secure postal or fax methods)

2.1.2 Keep personal information confidential

Only disclose personal information to those who legitimately need to know to carry out their role. Do not discuss personal information about your patients/clients/staff in corridors, lifts or the canteen or other public or non-private areas.

2.1.3 Ensure that the information you use is obtained fairly

Inform patients/clients of the reason their information is being collected. Organisational compliance with the Data Protection Act depends on employees acting in accordance with the law. The Act states information is obtained lawfully and fairly if individuals are informed of the reason their information is required, what will generally be done with that information and who the information is likely to be shared with.

2.1.4 Make sure the information you use is accurate

Check personal information with the patient. Information quality is an important part of IG. There is little point putting procedures in place to protect personal information if the information is inaccurate.

2.1.5 Only use information for the purpose for which it was given

Use the information in an ethical way. Personal information which was given for one purpose e.g. hospital treatment, should not be used for a totally separate purpose e.g. research, unless the patient consents to the new purpose.

2.1.6 Share personal information appropriately and lawfully

Obtain patient consent before sharing their information with others e.g. referral to another agency such as, social services.

2.1.7 Comply with the law

The Trust has policies and procedures in place which comply with the law and do not breach patient/client rights. If you comply with these policies and procedures you are unlikely to break the law.

For further Information Governance training refer to:

<http://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm>

Written by PHT Information Governance Manager, Sept 2010

3 CONFIRMATION OF DETAILS PROCEDURES

To ensure that the Patient Administration System (PAS) contains up to date particulars of all patients being treated, staff must verify with patients their personal details. This should be undertaken when the patient is arriving at the hospital on admission or when attending for an outpatient clinic or other types of appointment.

The types of details we must verify are those within the Patient Master Index (PMI) function within PAS and covers the following items:

- **Patient Forename, Surname and Title**
- **Date of Birth**
- **NHS Number (If not one shown on screen)**
- **Address and Postcode**
- **Telephone Number – Home and Work numbers**
- **Name and Practice Address of GP**
- **Religion**
- **Marital Status**
- **Next of Kin**
- **Ethnic Group**
- **Military No (If applicable)**

By checking the above details with the patient, we are ensuring the following:

- * **PAS contains the latest details for all our patients.**
- * **Mistakes or “old” details can be amended.**
- * **Information relating to the patient’s well-being, such as Religion and Ethnic Group, can be used in patient care.**
- * **Emergency contact details for relatives are up to date.**

In some circumstances it will be difficult to verify the details highlighted above as the patient may not be coherent at time of arrival (eg emergency admission, A&E, etc). However, it is important that at the earliest opportunity, the details are verified and amended accordingly.

Important – If details are amended*, please remember to print a new set of labels, remove and destroy any incorrect labels from casenotes. We must not retain any labels that do not contain current details.

Many thanks for your cooperation.

Prepared by: IT Information Manager

Issued: January 2003

Reviewed: July 2011

Version No: V1.2

*** To amend patient details you will need to have access to PMI at level 1. Please book the course PMI Add and Revise. In the meantime make sure you ask a colleague with access to amend the patient record.**

4 INTRODUCTION

This functionality will allow you to record referrals for patients of a specific Service, Clinician or an agreed Generic Area Code plus details of their contacts and the outcomes of these visits.

All Departments have a specified Service Group code to be able to identify their activity e.g.:

Department	Service Group Code
Physiotherapy	PHY
Urology	UROL
Disablement Services	DSC
Rheumatology Nurse Specialist	RHEUM
Breast Care Nurses	BCN
Respiratory Nurses	RESP
Adult Mental Health	AMH
Community Stroke Rehabilitation Team	CSRT
Occupational Therapy	OTC

5 Logging In

Log in: prd: (if required) <Return>
 Username: e.g. bloggsj <Return>
 Password: _ _ _ _ _ _ _ _ <Return>
 Hospital: (as appropriate)

Your password lasts for 90 days; you will be warned that it is running out so you have time to think of a new one.

If you forget your password or need to reset it, please contact IT Service Desk on SJH 7703 2680.

Your Default Function Set is PMI - To change function set press the **F6** function key once and select HC1

Function Set :HC1 HEALTHCARE WIDE CLINICIANS Function :

5 SEARCHING FOR YOUR CLIENT/PATIENT

5.1 LIST <LIS>

```

Function Set :HC1      HEALTHCARE WIDE CLINICIANS
Function :LIS
          PMI List

-----|Available Functions|-----
DAP - Delete Appointment      DCC - Delete Community Contact
DER - Delete Service Group Referral  DFU - DNA Follow Up
DP - Document Print           DSD - Delete Service Group Discharge
EPI - Episode Enquiry        FBA - Follow up Book Appointment
HWL - Waiting List Add/Rev/Del/List  LIS - PMI List
MAH - Maintain Address History  MGH - Maintain GP History
MSH - Maintain Surname History  NI - Inpatient Name Enquiry
NID - DW Inpatient Name Enquiry  OCC - SG Clinical Coding
PE - Patient Diary : By Patient  PEL - Patient Diary : By List
PLH - Patient Letter History     PMI - PMI Add/Revise
  
```

The function <LIS> is the means to establish if a patient has had past contact with NHS services in Portsmouth or the Isle of Wight. If they have then all or part details will be found on the PMI (Patient Master Index), searches can be made using various combinations of patient demographic information, i.e. surname and forename initial, date of birth or approximate age and sex, or any combination. If no matches are found, a list of similar sounding names may be made available to you. To ensure entries are not duplicated, use case note number only as a last resort.

6 BASIC GUIDE

1. From the Healthcare menu select function <LIS> and press <RETURN>.
2. To search for the patient always start by using the recommended SEARCH PROCEDURE of surname, forename initial, date of birth, sex .

Press <RETURN>. A list of possible matches will be displayed, e.g.

P M I L i s t						
Matching Patient Records (Name Search)						20/04/07 13:35 GAH
Seq	PAS No.	Name	Sex	DOB	Dth	Address
79	01124001	ANGUS &ABBY	F	01/12/1940		Flat 21 High St
80	01124001	ANGUS ABIGAIL	F	01/12/1940		Flat 21 High St
81	23044203	ANNALS FRANK	M	23/04/1942		172 Northern Parade PORTSMOUTH
82	01017026	ANON ARTHUR	M	01/01/1970		13 Redlands Ln EMSWORTH
83	01016410	ANORY JACK	M	01/01/1964		2 Sandcroft Ave RYDE
84	02022202	ANOTHER_TR	M	02/02/1922		
(More Available)						
Select Patient, press <P> for previous page, or <Return> to continue : ■						

3. Select correct patient from list by entering the appropriate Sequence Number found on the left hand side of the screen. Press <RETURN>. The patient's basic details will be displayed (see below). Check that they are correct and that you have the correct patient.

NOTE: You must select the sequence number, even if only one patient is displayed on the screen.

```

      Basic Details                P M I  L i s t                20/04/07 13:39 QAH
    -----
    PAS No.   :01017026
    NHS No    :                               Sts :RT
    Military  :
    Surname   :ANON                          Forenames :ARTHUR
    DOB       :01/01/1970                    Age      :           Sex   :M
    Preferred Name :                          Work Ph :0771 457 6013
    Title     :MR                             Phone    :
    Address   :13 Redlands Ln
    *Full*   :EMSWORTH
            :Hants
            :
    Postcode  :PO10 7SN                      Emsworth,Hants
    HA CODE   Q38                            SOUTH CENTRAL HA
    Postal
    Comment   :
    Enter: 1-Details 1, 2-Details 2, 3-Case Notes, 4-Episodes, or <Return> :█
  
```

ALL DETAILS MUST BE CONFIRMED AT EVERY CONTACT WITH THE PATIENT

For other details select from the taskbar at bottom of screen:-

1. **DETAILS 1** - Displays General Practitioner (GP) Details, Next of Kin, Religion, Marital Status, NHS Number etc.
2. **DETAILS 2** - Displays General Dental Practitioner (GDP) Details, Ethnic Origin, etc.
3. **CASENOTES** - Displays casenote number(s), base location of notes and status (current or withdrawn).
4. **EPISODES** - Displays all previous and current activity, attendances and episodes of care; eg: inpatient, outpatient and service group events, in reverse chronological order (most recent dates are at the TOP of the list).

Press F1 to exit <LIS>, or <Enter> to return to the Search screen.

NOTE: If details need to be amended this maybe administered whilst recording a referral.

7 MANAGING REFERRALS & CONTACTS

7.1 Community Contact by Clinician <CCC>

This function will allow the entry of the Service Group Referral onto P.A.S. Before proceeding with this function you should ALWAYS search for and check the patient's details in function LIS.

The Referral Screens will be tailored for your departmental needs. Development of the Healthcare function is ongoing therefore additional fields may be added to the referral Screens.

Whilst adding a referral you will get the opportunity to add or revise demographic details if necessary. To add a referral you must know the clinician or generic area code; and who the client/patient has been referred to. Some areas such as Physiotherapy are an exception to this rule as they have a temporary code of Unknown Physio.

1. From the Healthcare Menu select CCC- Community Contact by Patient.

```

Training system                /dev/pts/175                16/02/07 15:42

Function Set :HC1             HEALTHCARE WIDE CLINICIANS
Function :CCC
Community Contact by Clinician

-----|Available Functions|-----
AAD - Record Attendance and Disposal  ABT - Appointments Block Transfer
ACR - Cancel Clinic and Reschedule    ALR - Allocate Chair
APE - Appointment Enquiry             BWL - Waiting List Book Appointments
CAB - Cancel and Rebook Appointment  CAP - Cancel Appointment
CBK - Clinic Booking Summary          CC0 - Community Contact by Patient
CCA - SG Code Clinic Attendance      CCC - Community Contact by Clinician
CCD - Clinician Diary                CCE - Cancelled Clinic Enquiry
CEQ - Clinic Enquiry                 CMG - Clinic Management
CMH - Clinic Management (by Date)    CNE - Clinician Enquiry/Update
CPE - Patient Contact Enquiry        CTE - Maintain Treatment Episode

Press 'NEXT' for next page
  
```

HC1 - Available Functions

2. At Clinician Code enter the clinician or the agreed generic code that you are recording the patient/client activity for.

```

Community Contact by Clinician
Clinician Contact                16/02/07 15:43 QAH

Clinician Code      :TRAIN7  TRAIN,7
  
```

Clinician Contact Screen

3. Recall your patient using the last patient command (L).

```

Community Contact by Clinician
Patient Selection Details                20/02/07 12:55 QAH

Select Patient
PAS Number      : ██████████      Casenote No   :
NHS Number     :                   Old NHS No    :
Military Number :                   Age           :
Surname        :                   Years +/-     :
Forenames      :                   Postcode     :
Date of Birth  :                   Sex           :
  
```

Patient Selection Details Screen

4. Revise the Basic Details if required.

```

Community Contact by Clinician
Basic Details                          16/02/07 15:44 QAH

Do you wish to revise the following ? : NO

PAS No.   :06055932
NHS No    :                               Sts :RT
Military  :FJFDOS
Surname   :PIKE                           Forenames :JANICE
DOB      :06/05/1959      47Y           Age      :           Sex      :F
Preferred Name :
Title     :MRS                           Work Ph  :023 9256846
Address   :30 Westways                    Phone    :023 9278 5319
*Full*   :HAVANT
          :Hants
          :
Postcode  :P09 3LN      Havant,Hants
HA CODE   Q38          SOUTH CENTRAL HA
Postal    :
Comment   :JSP TRAINING PATIENT          Maintain Postal Address :
          :                               Enter?      :
  
```

Basic Details Screen

5. If there is not a current referral for your Service Group, you will be asked if you wish to create one. To proceed enter Y.

```

Community Contact by Clinician
Basic Details                                     16/02/07 15:44 QAH

Do you wish to revise the following ? :NO

PAS No.      :06055932
NHS No       :
Military     :FJFDDS           Sts :RT
Surname      :PIKE             Forenames   :JANICE
DOB          :06/05/1959       Age          :         Sex       :F
Preferred Name :
Title        :MRS              Create Referral? : 
Address      :30 Westways
*Full*      :HAVANT
            :Hants
            :
Postcode     :P09 3LN          Havant,Hants
HA CODE     :Q38              SOUTH CENTRAL HA
Postal      :
Comment     :JSP TRAINING PATIENT      Maintain Postal Address :
            :                  Enter?      :
    
```

6. At Case Note Details Screen use F9 and select the current Case Note (Super help Screen). If there is no current case note number telephone Health Records Library Registration or if your department hold new case note folders issue a new number. If you keep your own department notes only ie Physio, Cardiac Rehab the Location Code will be no Case Notes Issued (NCI).

```

Community Contact by Clinician
Command and Case Note Details                     16/02/07 15:44 QAH

Name |-----|
PIKE, JANICE                                     PAS No. 06055932

Casenote No : 
    
```

Command and Case Note Details Screen

7. Amend the first Registration Details Screen if necessary, with the patient's Registered Dentist,

```

Community Contact by Clinician
Registration Details                             16/02/07 15:45 QAH

Name |-----|
PIKE, JANICE                                     PAS No. 06055932

Blood Group  O Rh Negative           Allergies TEST
Recorded      03/07/2006 By B9E

Patient Needs? NO

Patient's GDP is MR J KELLY           Do you wish to view? :NO
Patient's GP is DR HA BAGSHAW        Do you wish to view? :NO
Next of Kin is GREG & ADRIANNE PIKE  Do you wish to view? :NO

Do you wish to revise the following patient details? :NO

Religion      :CE          CHURCH OF ENGLAND          Carer Support :
Marital Status :D          DIVORCED                    Place of Birth :PORTSMOUTH
Ethnic Group   :1          BRITISH

Occupation    :COMPUTER TRAINER          School      :
Occn(Spouse)  :
    
```

Registered General Practitioner, Next of Kin etc.

Registration Details Screen 1

8. Amend the second Registration Details Screen if necessary.

It is very important to reflect the source of your referral.

GP – This will default to the client’s/patient’s registered GP details’ from the previous screen. If the referring GP is not the registered GP, please amend with referring GP details; use F9 to locate GP code.

```

Community Contact by Clinician
Registration Details                               16/02/07 15:45 QAH
Name |-----| Valid Codes |-----|
PIKE, JANICE                                     CNN Consultant Non-Written Referral Request
                                                CON Consultant Written Referral Request
Do you wish to revise any of the following      DC Dental CON Written Referral Request
Agreement :                                     DCN Dental CON Non-Written Referral Request
                                                GDN GDP Non-Written Referral Request
Commission Ref :                               GDP GDP Written Referral Request
Referred by :GP                               GP GP Written Referral Request
GP Code :830968 Org Co GPN GP Non-Written Referral Request
Surname :BAGSHAW                               OPT Optician
Title :DR Initia OTH Other
                                                SLF Self Referral
Address :280 HAVANT ROAD
:DRAYTON
:PORTSMOUTH
:HANTS
Postcode :PO6 1PA
Phone :023 92374022
Reason For Change :
Do you wish to view? :NO
    
```

Registration Details Screen 2

Referred By Choices

Con – The code for Referrals from an Internal (within your Trust) or Tertiary Consultant (from outside your Trust). At Consultant Code F9 to search for an Internal Consultant code or enter NSC for a Tertiary Consultant.

```

Clinician Diary
Registration Details                               01/06/05 15:06 QAH
Name |-----| PAS No. 01018604 |-----|
TRIAL, MANNIE
Do you wish to revise any of the following      Agreement :YES
Agreement :                                     Line :
Commission Ref :                               Episodic Address
Referred by :CON                               1 Westways
Cons Code :                                     HAVANT
Provider Code :                               Hants
                                                Postcode P09 3LN Q17
                                                Temporary Address is not recorded
                                                Do you wish to view? :NO
Reason For Change :
    
```

Occupational Health –Select <OTH>

```

      C l i n i c i a n   D i a r y
Registration Details                               01/06/05 15:06 QAH
Name |-----|
TRIAL, MANNIE                                     PAS No. 01018604
Do you wish to revise any of the following details :YES
Agreement      :                               Episodic Address
Commission Ref :                               Line :       1 Westways
Referred by    :OTH                           HAVANT
                                                    Hants
                                                    Postcode   P09 3LN   Q17
                                                    Temporary Address is not recorded
                                                    Do you wish to view? :NO
Reason For Change      :
  
```

Patient Referral Screen 1

- The Patient Referral Screen will reflect the choice made on the previous registration Screen. Complete the screen with factual information. The referral date must reflect when the referral was received by your Service.

NOTE: Referral Source must reflect the correct code. Use F9 to view options.

```

      C o m m u n i t y   C o n t a c t   b y   C l i n i c i a n
Patient Referral                               16/02/07 15:47 QAH
Name |-----|
PIKE, JANICE                                     PAS No. 06055932
Service Group      :IMT      INFORMATION AND TECH
Lead Clinician     :TRAIN7   TRAIN,7
Referral date/time :01/02/2007 09:00
Referral Source    :GP       GENERAL PRACTITIONER
Referral Type      :NEW
Patient Category   :NHS      NHS PATIENT INFORMAL
Priority           :ROUTINE
Predicted Outcome  :
  
```

NOTE: Predicted Outcome is not a required field press enter to bypass.

REFERRAL CODES

Referral By	Con/GP Code		Patient Referral screen ref by & ref name field
GP	GP		Accept default
Internal Consultant	CON	Cons Code F9 search on the surname of the internal clinician.	Accept default
Tertiary Consultant	CTR	NSC (Non-Specified Consultant)	Over type with Non PHT Consultant details.
Occupational Health	OTH		OCH
Social Worker	OT		SW

10. The Referral Diagnosis/Outcome and Severity Codes will be provided for you on laminated cards, (these codes reflect your data pen codes). F9 will show codes that are used throughout the two Trusts (Acute & Community) and not just for your Service.

```

Community Contact by Clinician
Patient Referral 16/02/07 15:47 QAH
Name
PIKE, JANICE PAS No. 06055932

Referral Diagnosis/
Diagnosis Outcome Severity

Primary :OTMH OTHER - MENTAL HEALTH :
:
Subsidiary : :
:
Secondary : :
:
:
:

Comment 1 :
2 :
Referral Outcome :

Enter? :Y
  
```

Patient Referral Screen 2

11. There are two types of Contacts: Face to Face or Indirect (Perhaps a telephone discussion with patient / client or perhaps Multi Disciplinary Team Meeting etc). A Contact may be added for the past, present or future.

```

Community Contact by Clinician
Patient Contact 16/02/07 15:50 QAH
Name |-----|
PIKE, JANICE PAS No. 06055932
Command :ADD
Planned Contact Date/Time :14/02/2007 14:00
Actual Contact Date/Time :14/02/2007 14:00 Contact Duration :
Contact Type :FACE TO FACE
Location :CH CLIENTS HOME

Contact Diagnosis/ Severity
Diagnosis Outcome
Primary :OTMH OTHER - MENTAL HEALTH :
:
Subsidiary : :
:
Secondary : :
  
```

Patient Contact Screen 1

```

Community Contact by Clinician
Patient Contact 20/03/07 15:47 SJH
Name |-----|
PIKE, JANICE PAS No. 06055932
Command :ADD
Planned Contact Date/Time :21/03/2007 10:00 Contact Duration :
Contact Type :INDIRECT
Location :
|-----| Valid Codes |-----|
CANCELLED Previously planned contact has been cancelled
FACE TO FACE Face to face contact between clinician and patient
INDIRECT Related to Patient but Between Clinician & Others
Primary :1111 DIAGNOSIS DESCRIPTION :
:
Subsidiary : :
:
Secondary : :
  
```

NOTE: The Attend/DNA field is not used. The Activity and Contact Outcome Codes provide the stats required.

```

Community Contact by Clinician
Patient Contact 16/02/07 15:50 QAH
Name |-----|
PIKE, JANICE PAS No. 06055932
Clinician :TRAIN7 TRAIN,7 14/02/2007 14:00
Team :
Attend/DNA :

Activity Activity Time
:ASSI ASS.INIT. :00:15
:TG TREATMENT GIVEN :00:15
: :
: :
: :
Other Service Group Clinicians
:
:
Contact Outcome :ONG ON GOING
:C Complete

Enter? :Y █
  
```

Patient Contact Screen 2

8 EPISODE ENQUIRY VIEW <EPI>

If you wish to view Service Group details in episode enquiry, select the appropriate SG REG. The referral details will be displayed on the screen; press return through these details to view a list of the Contacts.

NOTE: SG - Service Group a with Contact activity attached. The Date is the first contact date not the date that the referral was received by the Service.

```

Select Episode      Episode Enquiry      20/02/07 15:12 QAH
Name
PIKE, JANICE      PAS No. 06055932

No Status      Date      Cons  Spec Hosp Ward Cat Casenote      WL-Cd A/P
-----
1 SG           14/02/07 C1i:TRAIN7  SGp:IMT  NHS J006055
2 WL ACTV      01/11/06 GEH    110    QAH      NHS Q257981  GEHWL
3 OP REG       07/08/06 ITAJ   110    QAH      NHS Q257981  ITAJOWL
4 OP REG       04/07/06 MJW    100    QAH      NHS Q257981
5 SG REG       11/05/06 C1i:JONHC1  SGp:SPNT NHS Q257981

<More available>
Select/Continue :
  
```

Referral Details:

```

Service Group Referral Details      Episode Enquiry      20/02/07 15:16 QAH
Name
PIKE, JANICE      PAS No. 06055932

Service Group      :IMT      INFORMATION AND TECH
Lead Clinician     :TRAIN7   TRAIN,7
Patient Category   :NHS      NHS PATIENT INFORMAL

Referral Source    :GP        GENERAL PRACTITIONER

Referral Type      :NEW
Referral date/time :01/02/2007 09:00
Priority           :ROUTINE

Discharge Date/Time :
Reason            :
Discharge Outcome  :

<Press Return>
  
```

Contact Details:

```

Appointments within Episode      Episode Enquiry      20/02/07 15:16 QAH
Name
PIKE, JANICE      PAS No. 06055932

Status Department      Date      Day Time Clinic Appt With Type
Site                   By Date/Time      Rev Date/Time      CAB
-----
IMT                    19/02/2007 MON 09:00      TRAIN7      FACE TO FACE
IMT                    14/02/2007 WED 14:00      TRAIN7      FACE TO FACE
** End of List **
  
```

9 RECORD CLINICIAN ACTIVITY <RAC>

Many teams record group sessions with just a number of patients rather than face to face contacts for each patient seen. Some clinicians may do Health Promotion Work etc. with classes of school children it is not appropriate to put a referral on for each child with a face to face contact so these are collected as group numbers for commissioners.

1. **Select RAC**
2. **Clinician Code** – Enter Code or F9 to search
3. **Date** – Date of event
4. **Time** – Time session is to take place
5. **Activity** – Enter Code or F9 to search
6. **Duration** – Length of Session
7. **Location** – Where the event will take place
8. **Group No's** – How many client / Patients are attending the Group Session.

Record Clinician Activity						
Clinician Activities						19/03/08 13:44 QAH
Clinician Code	:	TRAIN7		TRAIN,7		
Date	:	19/03/2008				
Time	Activity		Durtn	Loctn	Group	No's
:13:00	:BCC	BACK CARE CLASS	:01:00	:PHY		:10
:14:00	:GT05	GROUP THERAPY 0-5	:02:00	:HZ		:5
:	:		:	:		:
:	:		:	:		:
:	:		:	:		:
:	:		:	:		:
:	:		:	:		:
Enter? : <input type="text" value="Y"/>						

To Revise – RAC and overwrite.

To delete – RAC and F2 details.

The activity displays in CCD Clinician Diary:

C l i n i c i a n D i a r y				
Daily Diary View			19/03/08 13:54 QAH	
MISS 7 TRAIN		Wednesday 19 March 2008		Incomplete (I)
Times	Patient/Activity/Clinic	Event Type	Locn	Status
09:00-10:00	BCC BACK CARE CLASS	GROUP	PHY	
10:00-12:00	GT05 GROUP THERAPY 0-5	GROUP	BCR	
13:00-17:00	Clinic:TRN7		NGQA	
L	Last date with activity 18/03/2008 (or press '-' for 18/03/2008)			
N	Next date with activity 20/03/2008 (or press '+' for 20/03/2008)			
V : Change Diary View R : Diary Report F : Refresh Q : Quiet A : Clinician Activity P : Select Patient S : Shrink				

Select activity to list details or to revise or delete.

C l i n i c i a n D i a r y				
Daily Diary View			19/03/08 13:54 QAH	
MISS 7 TRAIN		Wednesday 19 March 2008		Valid Codes
Times	Patient/Activity/Clinic	Eve	DELETE	DELETE RECORD
			LIST	LIST RECORD
			REVISE	REVISE RECORD
09:00-1	Clinician Activity			
10:00-1	TRAIN7	TRAIN,7	19/03/2008	
13:00-1				
L Last	Command	:LIST		
N Next	Time	:10:00		
	Activity	:GT05 GROUP THERAPY 0-5		
	Durtn	:02:00		
	Loctn	:BCR Breast Care Reception		
	Group No's	:5		

10 CONTACT ENQUIRY FUNCTIONS

10.1 Patient Contact Enquiry <CPE>

This function will allow you to view the patient's contacts in the following ways:-

INDIVIDUAL REFERRAL	An Individual Referral
ALL REFERRALS	All Community Referrals
SERVICE GROUP	All Referrals for a Service Group
TREATMENT EPISODE	All Referrals for a Treatment Episode

10.2 Patient Contact Enquiry by Individual Referral <CPE>

1. Select CPE & search for the patient that you wish to view the Contacts for.
2. Select the Service Group Episode for the contacts that you wish to view.
3. A list of contacts for that Service Group will be displayed.

Status	Department	Date	Day	Time	Clinic	Appt	With	Type	
Site			By	Date/Time		Rev	Date/Time		CAB
	CARDIAC REH	31/05/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	24/05/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	20/05/2005	FRI	14:45		CJS		FACE TO FACE	
	CARDIAC REH	17/05/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	10/05/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	06/05/2005	FRI	14:45		CJS		FACE TO FACE	
	CARDIAC REH	03/05/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	22/04/2005	FRI	14:45		CJS		FACE TO FACE	
	CARDIAC REH	19/04/2005	TUE	14:45		CJS		FACE TO FACE	
	CARDIAC REH	25/02/2005	FRI	09:30		DJC		FACE TO FACE	
** End of List **									

10.3 Patient Contact Enquiry by all Referrals <CPE>

The date range will default to the earliest and most recent activity recorded. A comprehensive list of all Service Group contact activity will be displayed.

1. Select CPE
2. Select Patient
3. Select All Referrals

A list of contact across all the service group referrals will be displayed.

Across Service Groups						
Contacts between 12/09/1997 and 16/03/2005						
Date	Event	Typ	Locn	SGrp	Clinician	Activity
17/05/02	PCONT	F2F	SC0020	SNC	103133	SN004 HEARING RECEPT SN190 BACK TO CORE PROGRAMME
15/04/02	PCONT	F2F	SC0020	SNC	103133	SN004 HEARING RECEPT SN113 SN/SW
31/08/01	PCONT	F2F	HC0470	DEN	200136	CGXCR EXAMINATIO/CONSULTATION/RE
30/08/01	PCONT	F2F	HC0470	DEN	200136	SN999 CONTACT NOT POSSIBLE
19/03/01	CONT	F2F	GP0126	VHC	105319	HV039 CHS 36 MONTH REVIEW
02/02/01	CONT	F2F	HC0470	DEN	113011	CGXCR EXAMINATIO/CONSULTATION/RE
23/01/01	CONT	F2F	GP0126	VHC	105319	HV039 CHS 36 MONTH REVIEW
10/08/00	CONT	F2F	HC0470	DEN	111971	CGXCR EXAMINATIO/CONSULTATION/RE CPOHI OHI
07/12/99	CONT	F2F	HC0470	DEN	111971	CPODA DIET
Select	:					

NOTE: The different SGrp, listing Dental (DEN), School Health Service (SNC) & Health Visitor (VHC) Activity.

10.4 Patient Contact Enquiry by Individual Service Group <CPE>

This will allow you to display activity for a specific Service Group.

- 1 Select CPE
- 2 Select the Patient
- 3 Select the option Service Group
- 4 Select the Service Group Code (using F9 if code not known)

Contacts for the specific Service Group will be displayed, in this example DEN – Dental.

For Service Group DEN – DENTAL						
Contacts between 07/12/1999 and 16/03/2005						
Date	Event	Typ	Locn	SGrp	Clinician	Activity
D Change date range						
0 Change option						
R Request Report						
16/03/05	PCONT	F2F	HC0470	DEN	TRAIN9	CGFML FAMILIARISATION CPFRS FISSURE SEALANTS CGRDG RADIOGRAPHS
10/01/05	PCONT	F2F	HC0470	DEN	201391	CGXCR EXAMINATIO/CONSULTATION/RE
14/10/04	PCONT	F2F	HC0470	DEN	201391	CP0DA DIET CPFRS FISSURE SEALANTS
19/08/04	PCONT	F2F	HC0470	DEN	200449	CGXCR EXAMINATIO/CONSULTATION/RE CGFML FAMILIARISATION CPSAP SCALE & POLISH
Select : <input type="checkbox"/>						

11 REVISION OF AN EXISTING REFERRAL <SGR>

1. Select SGR
2. Select the patient for whom you are revising the referral for.
3. Revise the Basic Details if Required.
4. Select the SG REG that you wish to revise.
5. At the Command prompt F9 and select the option to Revise the patient Record.

Service Group Referral	
Command and Case Note Details	
Name	23/12/05 11:10 QAH
TRIAL, MANNIE	Valid Codes
Command	LIST LIST PATIENT RECORD REVISE REVISE PATIENT RECORD
Command : <input type="checkbox"/>	

12 REVISION / LISTING OF AN EXISTING CONTACT <CCC>

1. Select CCC.
2. Select the patient whose contact you wish to revise.
3. Select the SG REG for your Service Group that has the contact attached that you wish to revise.

```

Community Contact by Patient
INFORMATION AND TECH Patient Contact      28/02/07 13:55 QAH
Name | TRIAL, MANNIE | Valid Codes |
Command :
Planned Contact Date/Time :
Actual Contact Date/Time : Contact Duration :
Contact Type :
Location :

Contact Diagnosis/
Primary : Severity :
Subsidiary :
Secondary :
  
```

4. At the Command prompt F9 and Select the option to revise.
5. At the Planned Contact Date/Time F9 and select the contact that you which to Revise/List.

```

Community Contact by Clinician
Patient Contact      28/02/07 14:19 QAH
Name | TRIAL, MANNIE | PAS No. 01018604 |
Command :REVISE
Planned Contact Date/Time :
Actual Contact Date/Time : Contact Duration :
Contact Type :
Location : Patient Contact Superhelp |
Contact Date/Time Location Contact Type
18/02/2007 09:00 CH FACE TO FACE
13/02/2007 10:15 CH FACE TO FACE

Contact Diagnosis/
Primary :
Subsidiary :
Secondary :
  
```

13 DELETING A CONTACT <DCC>

1. Select DCC.
2. Select the patient whose contact you wish to delete.
3. Select the SG REG for your Service Group that has the contact attached that you wish to delete.
4. F9 at Contact Date/Time to select the Contact that you wish to delete.
5. Only state Yes at View Contact Screens if you wish to view the details of the Contact prior to deletion.

Delete Community Contact			
Delete Patient Contact		28/02/07 14:39 QAH	
Name		PAS No. 01018604	
TRIAL, MANNIE			
Contact Date/Time :		[REDACTED]	
View Contact Screens :			
Patient Contact Superhelp			
Contact Date/Time	Location	Contact Type	
18/02/2007 09:00	CH	FACE TO FACE	
13/02/2007 10:15	CH	FACE TO FACE	

6. At the prompt are you sure you wish to delete enter Y.

14 DELETING A SERVICE GROUP REFERRAL <DER>

1. Select DER.
2. Search for and select the patient that you wish to delete the Service Group Referral for.
3. Select the Episode for the Service Group Referral that you wish to delete.
4. The next two screens will show you the details of the referral that you are about to delete.

```

Delete Service Group Referral
Delete Service Group Referral                28/02/07 15:05 QAH
Name |
-----|-----
TRIAL, MANNIE                               PAS No. 01018604
Service Group      :IMT      INFORMATION AND TECH
Lead Clinician    :TRAIN7   TRAIN,7
Referral date/time :23/12/2005 11:08
Referral Source   :GP      GENERAL PRACTITIONER
Referral Type     :NEW
Patient Category  :NHS     NHS PATIENT INFORMAL
Priority          :ROUTINE
Predicted Outcome :

<Return> : 
```

5. You will be asked if you are sure that you wish to delete. Only delete if the referral was recorded in error.

15 DELETING A SERVICE GROUP DISCHARGE <DSD>

A Service Group Episode is discharged when the Contact Outcome is completed with a Discharge Code.

```

Delete Service Group Referral
Patient Referral 28/02/07 15:05 QAH
Name
TRIAL, MANNIE PAS No. 01018604
Referral Diagnosis/
Diagnosis Outcome Severity
Primary : :
Subsidiary : :
Secondary : :
: :
: :
Comment 1 :
2 :
Referral Outcome :
Are you sure you want to delete? :Y
  
```

A Discharge Episode Status reads SG DSCH, opposed to an open Service Group Referral which status reads, SG (if a Contact is attached) or SG REG (if a clinic appointment is attached).

```

1 SG DSCH 20/03/07 Cli:CP SGp:IMT NHS J006055
  
```

1. Select DSD.
2. Search for and select the patient that your wish to delete the Service Group Discharge for.
3. Select the Episode for the Service Group Discharge that you wish to delete (SG DSCH).
4. You will be asked if you are sure you wish to delete.

```

Delete Service Group Discharge
Delete Service Group Discharge 20/03/07 15:49 SJH
Name
PIKE, JANICE PAS No. 06055932
Discharge Date/Time :20/03/2007 15:48
Reason :IR Inappropriate referral
Discharge Diagnosis/
Discharge Diagnosis Outcome Severity
Primary :1111 DIAGNOSIS DESCRIPTION :
Subsidiary : :
Secondary : :
: :
: :
Discharge Outcome :1DIS DISCHARGE
Last Revision Date :20/03/07
Are you sure you want to delete? :YES
  
```

16 FAULT REPORTING

Contact IT Service Desk:

Email	it.servicedesk@porthosp.nhs.uk
Phone	02392 323 333

Some of the reasons you may need to contact the IT Service Desk:

EQUIPMENT FAILURE
SOFTWARE PROBLEMS
SCREEN FREEZES
PASSWORD NON-ACCEPTANCE *

You will need to give the Service Desk certain information, so always ensure you have the following information available. They may need to know:

Your Username.

The KB Number of the equipment. This is found on a small label (usually red or blue) stuck to the equipment.

The function set and function you were working in.

The patients details e.g. case note no.

Exactly what you were attempting to do, e.g. log on, admit patient, register patient.

16.1 Out of Office Hours

Contact the IT Service Desk and leave a message on the answer machine. They will deal with the problem as soon as they can. Alternatively email them.

If you feel there is a major system problem contact the switchboard for them to contact the engineer on call.

HELP WITH USING PAS

If you have only just attended the course and feel you may need additional support, help or advice, you can contact the IT Training Office.

* If you have not used PAS for more than 12 months you will be required to re-attend your training.

Email	it.training@porthosp.nhs.uk
Telephone	02392 323 333

17 IT TRAINING CANDIDATE APPEALS PROCEDURE

- Candidates who are unhappy with any aspect of the end of course/test assessment decision should first discuss the problem with the IT Trainer at the time of receiving the result.
- The reasons must be made clear by the candidate at this time.
- If the candidate is still unhappy with the result further discussion should take place involving the IT Training Manager within 3 days of the course/test date.
- The IT Training Department will keep a record of such discussion together with date and outcome.
- Where necessary the 1st marker will be asked to re-mark and the marking checked by the IT Training Manager.
- It should be noted that if the candidate was borderline double marking should already have been undertaken.
- If this does not provide satisfaction the candidate may raise a formal appeal.
- Appeals will only be accepted if made in writing (not e-mail) to the Head of Engagement & Delivery within 10 days of the candidate receiving their result, outlining clearly the circumstance of the appeal.
- The 1st & 2nd markers will meet with the Head of Engagement & Delivery to consider if there are any aspects that should be taken into account in the candidate's performance.
- In some circumstances the candidate may be offered a re-test (e.g. hardware or software problems).
- If this is not the case and the result remains unchanged and the Training Manager is unable to resolve the impasse then the candidate may write to the Head of Engagement & Delivery (within 5 days of receiving the 3rd result) who will consider all evidence and circumstances of the appeal also taking into consideration responsibilities to the Trust and Data Protection Act to make a final decision.

IT Training QAH April 2015

18 MANUAL VERSION CONTROL/LOG

Manual	Healthcare Wide Scheduling – HC1 Contacts	
Version	VN2.5	
Date	April 2015	
Revisions		Page
Updated	Headers and footers updated	All
Updated	ICT changed to IT	All

Manual	Healthcare Wide Scheduling – HC1 Contacts	
Version	VN2.4	
Date	July 2011	
Revisions		Page
Updated	Helpdesk title updated to Service Desk	5-1

Manual	Healthcare Wide Scheduling – HC1 Contacts	
Version	VN2.3	
Date	July 2011	
Revisions		Page
Updated	The manual has been updated to reflect new manual template design of Headers and Footers	
Updated	Addition of link to the Information Governance training tool web site	2-2
Updated	Confirmation of details procedures – Patient Amendments	3-1

Manual	Healthcare Wide Scheduling – HC1 Contacts	
Version	VN2.2	
Date	March 2008	
Revisions		Page
New	Confirmation of Details	3-1
New	Record Clinician Activity <RAC>	9-1
New	Support	18-1

Manual	Healthcare Wide Scheduling – HC1 Contacts	
Version	VN2.1	
Date	February 2008	
Revisions		Page
Updated	Formatting and text refinements (unlisted as content and meaning unchanged)	All