paperlite

The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Allied Health Professionals
eRecord
Pocket Guide

Healthcare at its best
with people at our heart

#LetsGetDigital

This guide is designed to help you get the most out of the ***paperlite*** system through quick reference guides for common tasks in ***eRecord***

Use this handy checklist to help you on your first day using the Paperlite eRecord:

☐ Set up my patient lists for the areas where I work *(page 5)*

☐ Set up the task lists I need to do my job *(page 6)*

☐ Set up the relevant tabs within the AHP Workflow *(page 10)*

☐ Set up my list of note types to the ones I need *(page 10)*

☐ Set up my favourite order folders *(page 12)*

☐ Set up my navigator bands with the assessments I need *(page 14)*

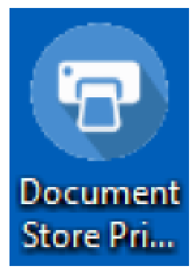
If you need any help with any of these take a look at the Paperlite website http://***paperlite*** or call the service desk on 21000.

What about the paper?

Although the majority of the patient journey has now been digitised, we still have some paper documents such as consent forms and patient completed questionnaires.

If you need to use any of these paper documents follow this simple process:

Open Document Store Printing from the desktop of your PC



Click the forms button on the left

Enter the patient MRN

Select the document

Print the document (if available) or print a label to add to your document

Once you have completed the document, drop it into a scanning tray and medical records will scan it into *eRecord* for you

Your Notes

Short Patient List Set Up

1. Select Short Patient List *(top of the screen)*
2. Click the list maintenance icon *(near top left)*
3. Click New
4. Select Location
5. Click Next
6. Click the + on Locations *(on the right)*
7. Click the + for the site, e.g. Freeman Hospital
8. Click the + again, e.g. Freeman *(Don't click in the empty square!)*
9. Tick the box for your ward(s), e.g. FH17
10. Select Encounter Types *(on the left)*
11. Add tick in the box for: Day Case Inpatient

    Regular Day Admission Regular Night Admission
12. Click Finish
13. Select your ward and use the to move it to the right
14. Click OK

! **This is a location based list - other methods are in use in some cases, please check with managers in your area**

Short Patient List

Task List Set Up

1. Select Task List *(top of the screen)*
2. Right click on Assigned Tasks *(towards top left)*
3. Click Customise Patient View
4. Put a tick in the box for Choose a Patient List
5. Choose your patient list e.g. FH17
6. Click OK
7. The patients on your list will now display on the left
8. Tasks will show in the middle of the screen

Filtering Tasks

1. Click Options *(top of the screen)*
2. Click Task Display
3. Go to the Task Types section *(bottom right)*
4. To remove a Task Type unselect it on the left
5. To add a Task Type select it on the left
6. Your selected Task Types will show on the right
7. Click OK
8. Your Task List will now be filtered to show only your chosen types

Change Timeframe

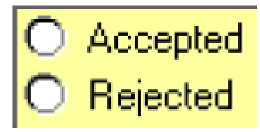
1. Right click on **Assigned Tasks** *(towards top left)*
2. Click **Customise Patient View**
3. Click the **Time Frames** tab *(top left of the box)*
4. Select ◉ Generic Time Frame
5. Set the Date/Time range at the bottom of the screen
6. Click **OK**
7. Tasks for that Date/Time range will now show
8. **Remember the timeframe set here is static—it will not automatically roll forward**
9. To see a rolling 24 hour period set the timeframe to:

   ◉ Defined Time Frame   24 Hour Shift

Task List Icons	
	Completed
	Not Done
	Over Due
	Medication task
	Care Plan task

Accepting / Rejecting Referral

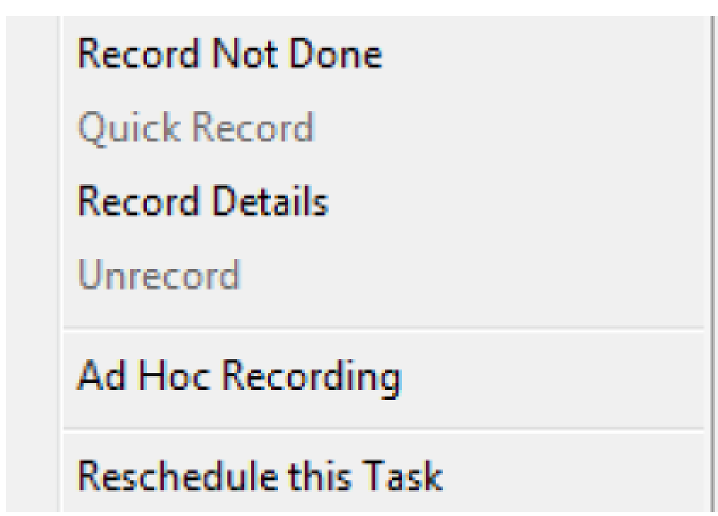
1. Select Task List *(top of the screen)*
2. Select **Referrals** tab
3. **Double click** to open the referral form



4. Select Accepted or Rejected
5. If **accepted** complete the **Contact Schedule Time** box
6. If **rejected** complete the **Comments** box
7. Click the ✓ to sign *(top left)*

Reschedule / Record Not Done

1. **Right click** on a task
2. Select Reschedule this Task or Record not Done
3. Enter a reason



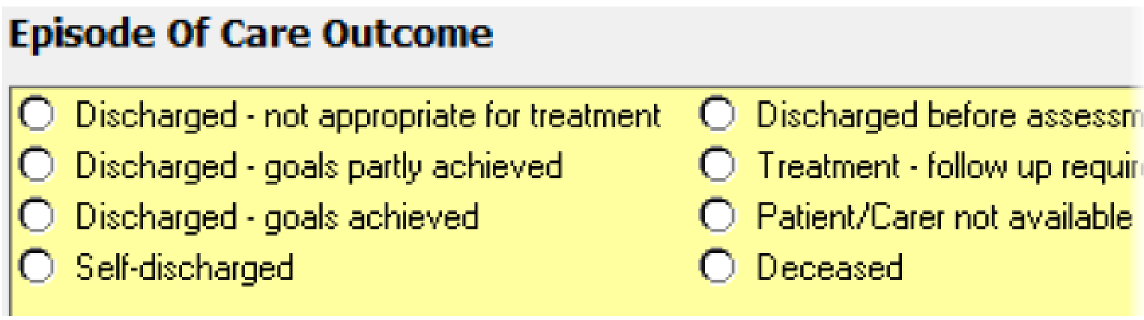
Documenting Contacts

1. Select the **Contacts** tab

2. **Double click** a patient's name to open the contact form

3. Complete all of the relevant sections

4. Select an Episode of Care Outcome as appropriate



5. To schedule a follow up select Treatment - follow up required and then add a date/time

6. Click to sign *(top left)*

7. If a follow up is scheduled this will appear on the Contacts tab at the scheduled time

8. If the patient is discharged they will no longer appear on the Contacts list

9. Completed Contact and Referral forms are viewable in the Ad-Hoc Forms section of the main menu

Workflow Set Up

1. Select AHP Workflow *(patient record, main menu)*
2. Add a tab by clicking + and close a tab by clicking ×
3. Click ≡▾ then Components ▸ to add/removes items from the light grey Workflow Menu
4. Drag a tab or a menu item to change the order

Personal Note Type List

1. Click Select Other Note *(bottom of light grey menu)*
2. Click View and then Customise *(top of screen)*
3. Find your speciality in the Available Note Types section
4. Select each relevant note type and use the ➡ to move them to the right *(into Personal Note Type List)*
5. Set a default at the top Default Note Type: <None>
6. Click OK
7. Set the Note Type List Filter to Personal

   Note Type List Filter:

   Personal

8. The Type drop down will now show your selected types

   *Type:

Create Auto Text

1. Click Manage Auto Text *(on a text box)*
2. Click the +
3. Add an Abbreviation starting with @ — Abbreviation: @Example
4. Enter and format your text, insert data tokens and drop down lists
5. Click Save
6. To use your auto text: Click into a text box and type '@'

Making a Note

1. Complete the appropriate sections on the workflow page
2. Click an option in Create Note *(bottom of menu)*
3. Finalise your text
4. **Ensure the Note Type is set correctly for your specialty and the type of note**
5. Submit your note by clicking Sign/Submit

> **!** **Clicking Save will create a draft of the note which is only visible to you, ensure you always Sign/Submit**

Order/Referral Favourites

1. Select AHP Workflow *(patient record, main menu)*
2. Go to New Order Entry ... in the light grey menu
3. Type in the order/referral you wish to save, e.g.

   referral to inpatient dietitian
4. In the search results click the ☆
5. Select a folder, e.g. Favourites
6. Click Add
7. Your favourites will now show in the section **Mine**

	Ordering Icons
	Order Set
	Care Plan
	Order Basket
	Missing required details
	Inpatient
	Out Patient
☆	Favourite

From Workflow

1. Go to New Order Entry ... in AHP Workflow
2. Type in the order/referral you wish to place, e.g.

   referral to inpatient dietitian

3. Click the order/referral in the search results
4. Click the order basket 2
5. A summary of your orders will be shown, click Sign
6. Select the order and complete any missing details
7. Click Sign

From Requests/Care Plans

1. Click Requests/Care Plans then click Add
2. Type in the order/referral you wish to place, e.g.

   referral to inpatient dietitian

3. Click the one you wish to place and it will turn blue, e.g.

   Referral to Inpatient Dietitian

4. Click Done
5. Select the order and complete any missing details
6. Click Sign

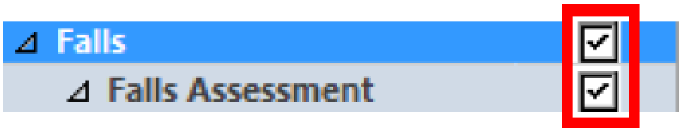
Orders & Referrals

Set Up Navigator Bands

1. Select **Assessments/Fluid Balance** *(patient record, main menu)*
2. Click **View** *(top of the screen)*
3. Go to **Layout** ▸ and then click **Navigator Bands**
4. On the left side choose the Navigator Bands you wish to see
5. Use the arrow ⇨ to move them to the right
6. On the right side use the ⇦ to remove any Navigator Bands you do not need
7. Use the ⇧ and to ⇩ change the order
8. Click **OK**
9. A message will appear asking you to restart the application, click **OK**
10. Close the patient's record using the ✖ *(top left, near the name)*
11. Reopen your patient's record from the **Recent** ▾ list or from Task List
12. Click back into **Assessments/Fluid Balance** and your selected Navigator Bands will now display

Starting Assessments

1. Remember to double click to start the assessment



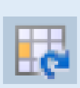
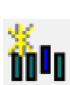
Keyboard Controls

2. Move between fields: Use the Tab key

3. Text entry fields: Type into the box then press the Enter key to submit

4. Single select lists: Use the arrow keys to move to the answer and press the Enter key to submit

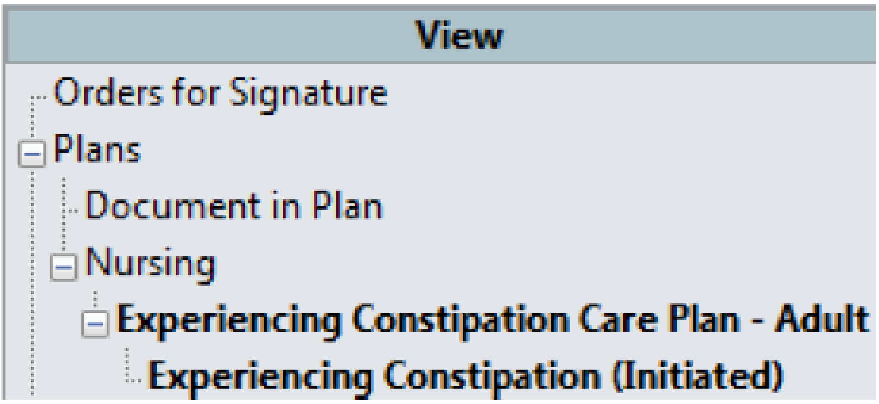
5. Multi select lists: Use the arrows to move through the list, use the Space bar to select, use the Enter key to submit

Assessment / Fluid Balance Icons	
	Conditional Field - Will trigger additional questions depending on the answer
	Calculated Field - **Will not calculate if tick has not been added**
	Repeatable Group - Used for recording the same information on different parts of the body - **add the tick first and then click the icon**
	Insert Date / Time - add an additional column

Viewing a Care Plan

1. Click **Requests/Care Plans** *(patient record, main menu)*

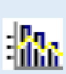
2. Any plans which are in place will be shown in the View section on the left:



3. Plans which are in use will show as **Initiated**

4. Select a plan to view its contents, e.g.

Experiencing Constipation (Initiated)

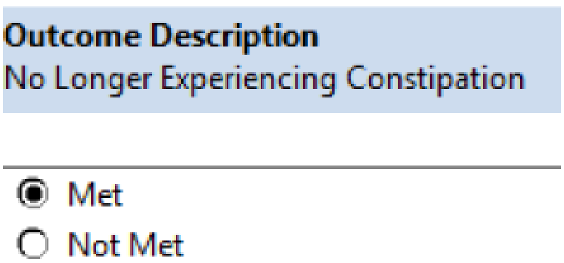
Care Plan Icons	
	Goal
	Note
	Indicator
	Intervention
	Order

Document in Plan

1. Click **Document in Plan**

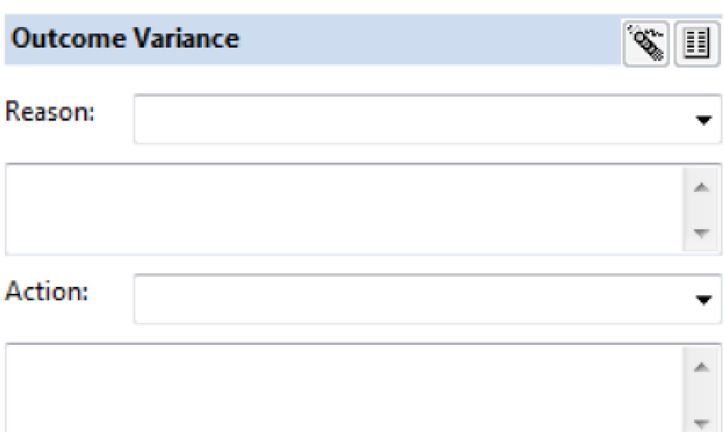
2. Click the record button at the end of the line you wish to record against

3. Select an Outcome in the Outcome Description section:



4. If done/met add an Outcome Note as required

5. If Not Done/Not Met add Outcome Variance as required:



6. Once complete click **Sign Documentation**

Ambulatory Organiser Set Up

1. Select Ambulatory organiser *(top of the screen)*
2. Click the drop down Patients for: No Resource Selected
3. Type the name of the clinic into the search box
4. Add a tick next to the relevant clinic, e.g. ☑ DR M DAS
5. A group can also be searched for and selected, e.g.

   ☑ CARDIOLOGY
6. Note: the Day View tab and the Calendar tab need to be set up separately

Ambulatory Organiser Colours	
	Checked in
	In Room
	With AHP/Technical/Other
	Patient ready to be seen
	Investigations/Diagnostics
	Notes Review/With Clinician
	Did Not Attend

Your Notes

Need more support?

For more information and additional support go to the Paperlite website **https://*paperlite*** where you will find:

- Video Guides
- Quick Reference Guides
- Additional Training Sessions

Remember if you need help, our service desk is available 24/7, Call us on 21000

The Irony of a paper guide for a paperlite EPR is not lost on us ;-) but we think this small piece of paper is worth it to help you get the most out of the system