paperlite

NHS
The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Doctor

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 7)*
- ☐ Set up navigator bands with the assessments I need *(page 12)*
- ☐ Set up the relevant tabs within the Clinician Workflow *(page 16)*
- ☐ Set up my list of note types to the ones I need *(page 16)*
- ☐ Set up my favourite order folders *(page 18)*
- ☐ Set up the task lists I need to do my job *(page 20)*

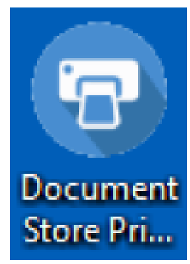
If you need any help with any of these take a look at the Paperlite website http://***paperlite*** or call the service desk on 21000.

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, 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
15. Your list will now display

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/Technican/Other
	Patient ready to be seen
	Investigations/Diagnostics
	Notes Review/With Clinician
	Did Not Attend

Message Centre Set Up

1. Select Message Centre *(top of the screen)*
2. Click the Pools tab *(in the pane on the left)*
3. Click Manage
4. Select an option from the Available Pools, e.g. FH17 RTE
5. Click Opt In >
6. You will now see all results to endorse for your chosen pool

Message Centre - Endorsing Results

1. Click the Pools tab
2. All patients with results to endorse will be shown
3. Double click on the patient
4. Review results - blue text indicates normal range, red text indicates outside of normal range
5. Click the Trend link to see the last 5 results
6. Add comments as appropriate
7. OK & Next will endorse the result and move on to the next patient
8. Skip can be used if you do not wish to endorse this patients result, e.g. don't know enough about them

Selecting a Patient List

1. Select Doctors Worklist *(top of the screen)*
2. Choose a Patient List, e.g. List: Select a list *(top left)*
3. **If there is no list available please set one up by following instructions on page 7**

Establish Relationships

1. Click Establish Relationships
2. Select your role * Relationship
3. Review your list, tick or untick and then click Establish

Set Up of Columns

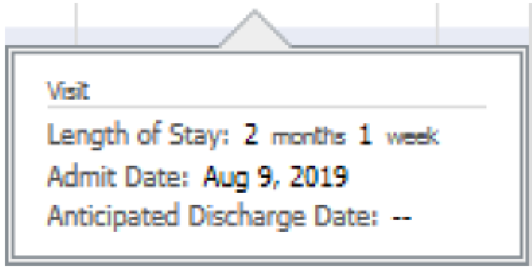
1. Click *(top right, near search box)*
2. Click to disable a column, click to enable it
3. Reorder your columns by dragging them
4. If there is not enough space on your display to add all of the selected columns some will show as Not in View
5. If you have columns which are Not in View the following message will display:

Some columns and their indicators are no longer visible du

6. If the above message occurs click **Configure Columns** or and alter your configuration

Further Information

1. Click each column to see further information:



Tasks

1. Tasks for clinicians will display in Tasks the column
2. Click in this column to display the tasks for each patient
3. Select a task to complete it, e.g. VTE on Admission (within 6hrs)

I-PASS

1. Open I-PASS by clicking ▸ next to the patient name
2. Update the Illness Severity using the buttons

   Unstable | Watch | Stable | Discharging

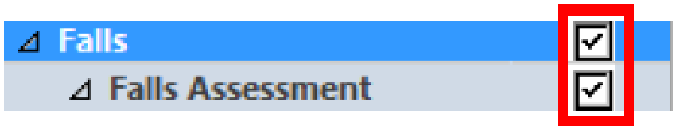
3. Notes can be added in the Patient Summary, Actions, Situational Awareness & Planning section
4. **Notes added here for your own/colleagues reference only and do not form part of the medical notes**
5. Click the Clinical Data tab at the top of the screen to view vital signs, labs, medications and fluid balance

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 o
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



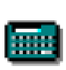
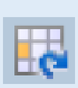
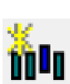
Keyboard Controls

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

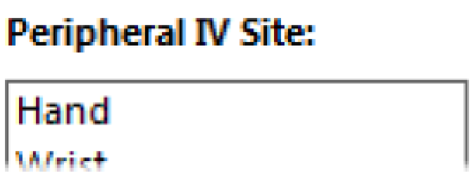
Assessment / Fluid Balance Icons	
	Conditional Field - Will trigger additional questions depending on the answer
	Calculated Field - **Will not calculate if tick has not been added**
	Repeatable Group - Used for recording the same information on different parts of the body - **add the tick first and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

Inserting Lines / Devices

1. Select Assessments/Fluid Balance *(patient record, main menu)*
2. Select the relevant section, e.g. Adult Lines - Devices
3. Select the relevant Line/Device, e.g. Peripheral IV
4. **Double click in the time column next to the Line/Device :**

> **!** **Ensure the tick is added before proceeding**

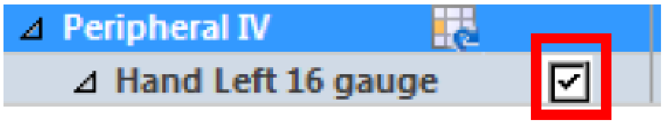
5. Click the Repeatable Group icon
6. The Label box will open, select an option from each box



7. Click OK
8. The Activity field will automatically open
9. Select Insert
10. Complete the relevant details
11. Click Sign

Managing Lines / Devices

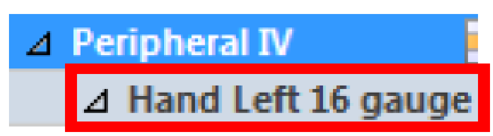
1. Double click next to the label in the relevant time column to add the tick



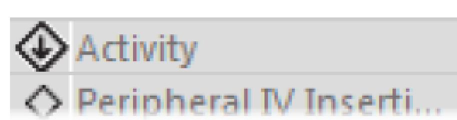
2. The field will automatically open Activity
3. Select the relevant activity, e.g. Assessment
4. Complete the relevant details and Sign

Removing Lines / Devices

1. Double click next to the label in the relevant time column to add the tick
2. Select Removed from the field Activity
3. Complete the relevant details and Sign
4. **Then, right click on the line/ device label, e.g.**



5. Select Inactivate



! **Ensure all steps are recorded in the correct time column for the time you are completing the action**

Workflow Set Up

1. Select Clinician Workflow *(patient record, main menu)*
2. Add a tab by clicking + and close a tab by clicking X
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 from the record (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 / Prescription Favourites

1. Select **Clinician Workflow** *(patient record, main menu)*
2. Go to New Order Entry ... in the light grey menu
3. Type in the item you wish to save, e.g. fbc
4. In the search results click the ☆ next to the order
5. Select a folder, e.g. Favourites
6. Click Add
7. Your favourites will now show in the **Mine** section
8. Note: Existing order sets are still available, search for them in the New Order Entry section

Ordering Icons
Order Set
Care Plan
Order Basket
Missing required details
Inpatient
Out Patient
Take home medication

Adding an Order

1. Go to the New Order Entry ... component
2. Type in the order you wish to place, e.g. fbc
3. Click the order from the search results
4. Click the order basket 2 then click Sign
5. Select each order, complete details and Sign

Adding a prescription

1. Go to the New Order Entry ... component
2. Select the type of prescription *(left of the search box)*

Inpatient | Discharge Meds as Rx   Given In Clinic | Outpatient Prescription

3. Type in the medication and select from the search results
4. Click the order basket 2 then click Sign
5. Select each order, complete details and Sign

Diagnosis and Problems

1. Got to the Diagnosis & Problems component
2. Select from the drop down, e.g. **Add as** This Visit
3. Type into the search box and select the relevant condition
4. **Note: Be specific, e.g.** Chronic kidney disease stage 2

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 to change this back afterwards, e.g.**

   ◉ Defined Time Frame 24 Hour Shift

Reschedule / Record Not Done

1. Right click on a task to reschedule or record as not done

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

Modify Resuscitation Status

1. By default all patients will have a Resuscitation Status of **Full Resuscitation** applied

2. To change this you need to **modify** the Order

3. Select Requests/Care Plans

4. Find the order:

   Patient Care

   Resuscitation Status Ordered

5. Right click on the order and select Modify

6. Complete the mandatory fields

7. Change the DNACPR Status drop down field as appropriate

   ***DNACPR Status:** Full Resuscitation

8. If Do Not Resuscitate is selected a prompt will display advising to complete the TEP form

9. Click the button on the bottom of the alert TEP Form

10. The Treatment Escalation Plan (TEP) form will open

11. Complete all relevant sections

12. Once the form is completed and signed the Resuscitation Status will update on the banner bar:

    Resus:Do Not Resuscitate

Depart Process

1. When a patient is ready to be discharged click **Depart** on the banner bar *(top of the screen)*

2. Select the Diagnosis section

3. Amend as appropriate or **Mark all as Reviewed**

4. Click the Medication Reconciliation section

5. Continue, create Rx or discontinue each medication as appropriate

6. Complete additional section as appropriate:

   - Diagnosis
   - Medication Reconciliation
   - Legal Information
   - Other Contributors
   - Allergies
   - Results
   - Discharge Checklist
   - Key Discharge Dates
   - Do not use

7. **Once completed use Document Store to create the discharge summary as per usual process**

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