paperlite

The Newcastle upon Tyne Hospitals
NHS Foundation Trust

How to Create a New Document

Introduction

Clinic letters and other documents are created in PowerChart using the Document Creation menu.

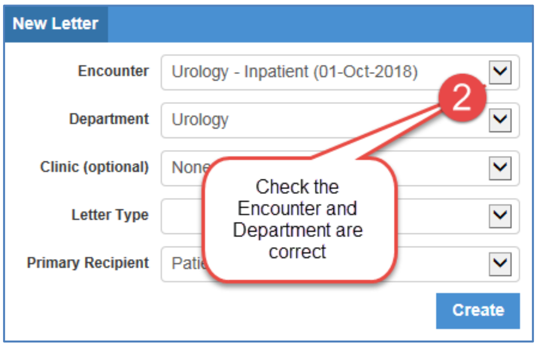
This guide assumes you are familiar with PowerChart and you have a patient record open at the correct encounter.

Create a New Letter

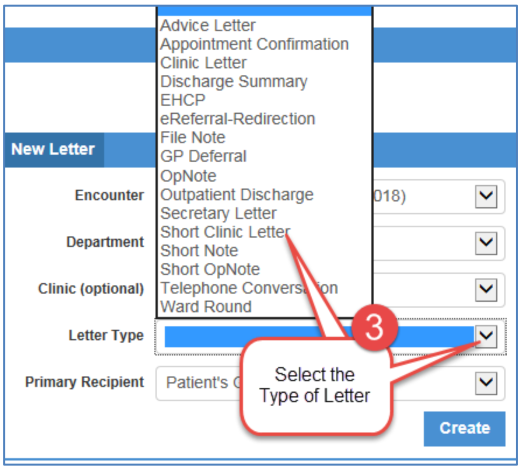
1. Go to the patient record menu and select **Document Creation**

2. Check the **Encounter** and **Department** are correct

   If not use the drop down arrows to select the correct details

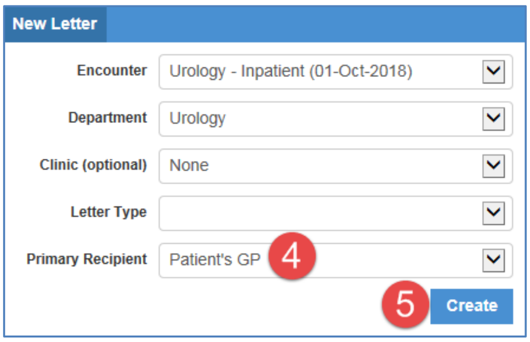


3. Select the **Letter Type**



4. Select the **Primary Recipient**

5. Click **Create**



Layout of the Letter

a. **Primary Recipient** (shown with yellow border)

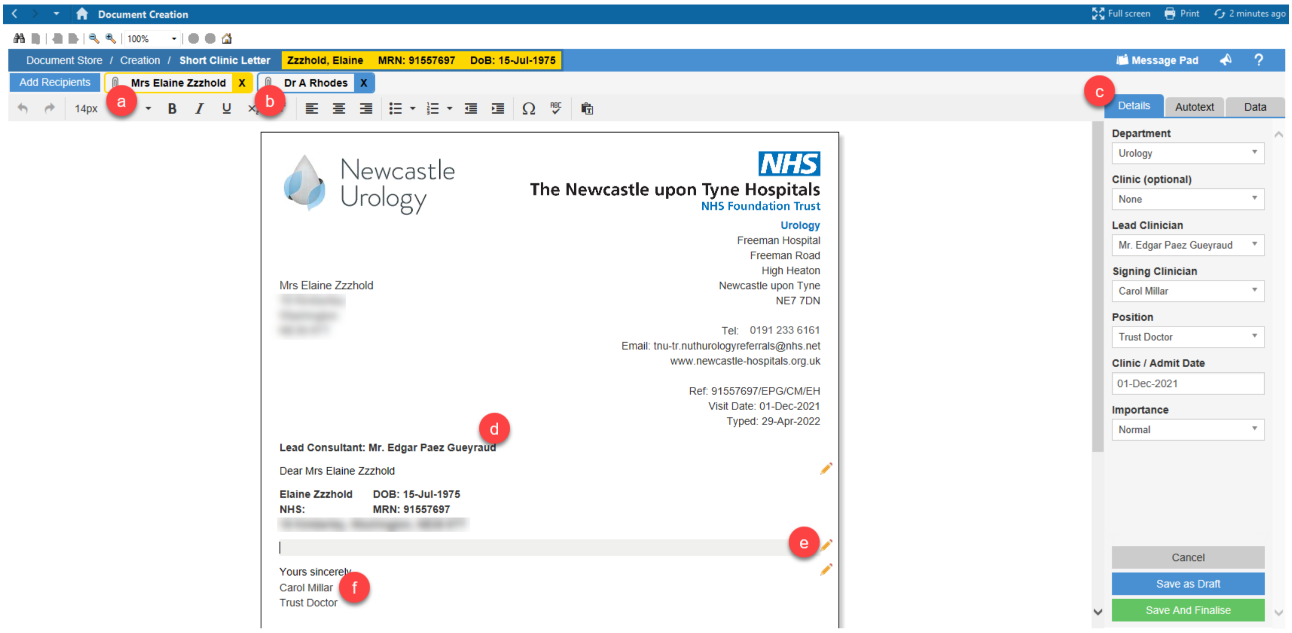
b. **Other Recipients** (shown with blue border)

c. **Details** tab – from here you have the option to change some information such as the Department, the Lead Consultant and the Signing Clinician etc

d. **Lead Consultant** – select the lead consultant from the Details tab on the right

e. **Pencil** – this symbol shows which parts of the letter are editable

f. **Signing Clinician** – select the signing clinician from the Details tab on the right

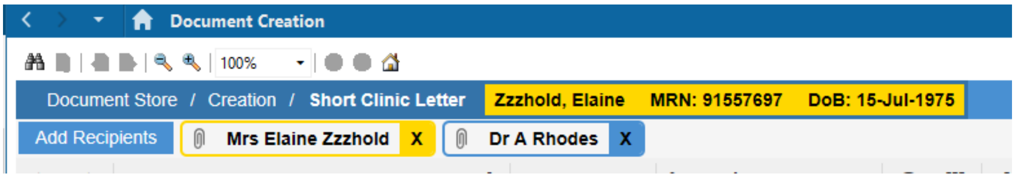


Recipients

The primary recipient, i.e. the person you are writing to, is highlighted with a **Yellow** border.

Any other recipients are shown with a **blue** border. These can be swapped around by clicking and dragging or **removed** by clicking the **X**.

Use the **Add Recipients** button to add further copies



Adding Recipients

This Add Recipients button opens a search field allowing you to find contacts within the Trust and external contacts.

1. **Last Letter** - this tab will display the recipients of the last letter

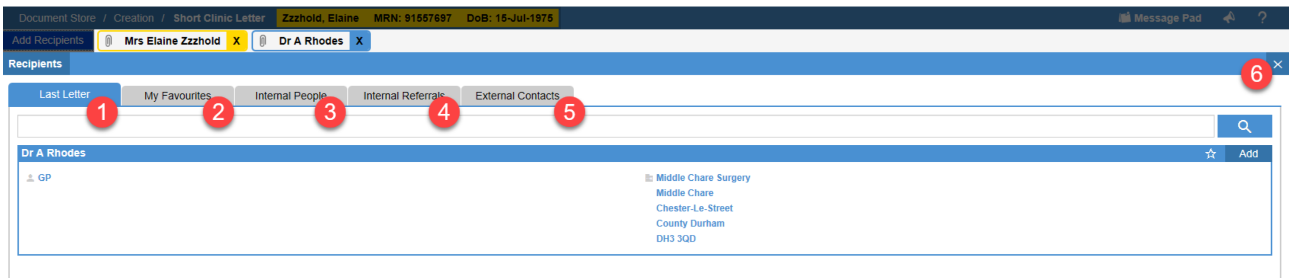
2. **My Favourites** – this tab will display any of your saved contacts

3. **Internal People** – from here you can search for people within the Trust and they will receive an email with a link to PowerChart and the document.

4. **Internal Referrals** – use this option to search for a department. You will then have the opportunity to add a person's name.

5. **External Contacts** – use this option to search a directory of other organisations i.e. hospitals etc. You will then have the opportunity to add a person's name. If the organisation you are looking for is not in our directory there is an option to create a new recipient.

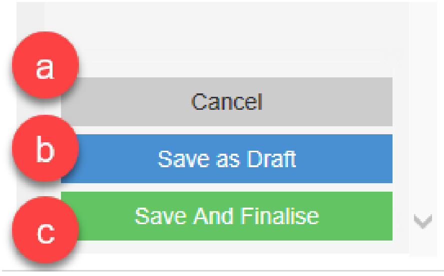
6. **Close** - closes the Add Recipients window and returns you to the document.



Saving Documents

From the bottom right of the screen you have 3 options.

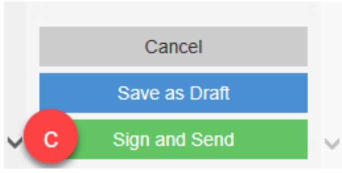
a. **Cancel** - the document or cancel the changes made



b. **Save as Draft** –to save as draft allowing you to return to it later. Saved documents will appear in Doc Finalisation which you will find on your toolbar at the top of the screen

c. **Save and Finalise** – to finalise the document ready for signing. Finalised documents will appear in Doc Signing for the signing clinician. You will find Doc Signing on the toolbar at the top of the screen

If you are the signing clinician you will see **Sign and Send** instead of Save and Finalise.



Sending Documents

Once signed, documents will go to a Print Queue for your secretary to send.

If you are writing your own letters you must let the secretary know so that they can check the Print Queue and ensure your letters are sent.

The method of sending letters has changed and is a large cost saving for the Trust.

The majority of letters are now sent to an offsite printing company which is cheaper than the cost of the Trust printing and sending out letters.

A number of letters are sent via email. The majority of letters to GP’s now go via a system called ICE, letters to internal colleagues are sent via the Trust email facility @nhs.net.

The majority of internal referral letters will continue to be printed and sent via internal mail but this is expected to change in the near future.

Please remember to inform your secretary or local admin team if you produce your own letters as they must check the ‘print queue’ in order to send the letters.