The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Outpatient Nurse *eRecord* Pocket Guide

Healthcare at its best
with people at our heart

Contents

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

If you need help with any of these topics, visit the IT Training Support website using the QR codes within this guide, or call Service Desk on 21000.

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
5. Multiple clinics can be selected and viewed together
6. A group can also be searched for and selected, e.g. **Cardiology**
7. Day View & Calendar tabs need to be set up separately

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

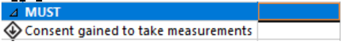
Assessments/Fluid Balance Setting Up Navigator Bands

1. From the main patient menu click **Assessment/Fluid Balance**
2. Click **View**(menu bar at the top of the screen)
3. Go to **Layout > Navigator Bands**
4. From the **Available** panel on the left click on a Navigator Band to select it
5. Move the band to the **Current** panel on the right using the **right facing arrow**
6. Remove any bands you do not need by selecting them, and clicking the **left facing arrow** to move them into **Available**
7. You can change the order of the bands using the **up and down arrows.**
8. Click **OK**
9. A message will appear asking you to restart the application
10. Close the patient’s record using the **X** (top left)
11. Reopen your patient’s record from the **Recent** list, or from **CareCompass**
12. Click back into **Assessment/Fluid Balance** and your selected Navigator bands will now display

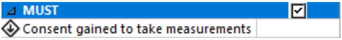
Assessments/Fluid Balance
Completing Assessments

1. Select the appropriate assessment within **Assessment/Fluid Balance**

1. Click **Insert Date/Time** and select the correct date and time



2. Double click in the title banner which will put a tick in the box and activate the column



3. This will help guide you through the assessment, and trigger any automatic calculations

To View the Data in Nurse Workflow

1. Select **Vital Signs** to see **Vital Signs** and **Height/ Weight**

2. Select **Labs** to see **Urinalysis**

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 - add the tick first and then click the icon
	Insert Date / Time - add an additional column

Emergency Contact Details
View and Update details

1. To view **Emergency Contact Details** click on the patient's name

2. **Emergency Contacts Details** can be added or updated by clicking the **+v** drop down and select the **Emergency Contact Details** option

3. Once the details have been added or updated, click the **green tick** ✓ button to save them

Nurse Workflow
Workflow Set Up

1. Select **Nurse Workflow**
2. Add a tab by clicking **+**, close a tab by clicking **X**
3. Drag a tab or a menu item to change the order
4. To add or remove items from the menu click ☰ then select **Components**

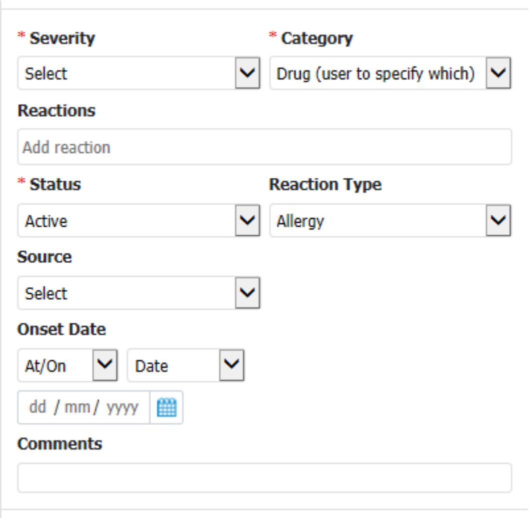
Situation Background & Assessments

The **Situation Background** and **Assessments** tabs can be further customised

1. Click ☰ then **View Layout**
2. You can then choose different layout options
3. To arrange the different boxes, ensure **Drag and Drop** is ticked
4. If you want to change the colours of the individual boxes, click the menu button on the box ☰
5. Select **Colour Theme**
6. Use the Up or Down facing arrows to close or open each box
7. To prevent a box opening, remove the tick from **Default Expanded**

Nurse Workflow
Adding An Allergy

1. Go to the relevant tab in your **Workflow**
2. Select **Allergies and Adverse Reactions** (light grey menu)
3. Type the name of the substance in the search box
4. Select the substance from the search results, e.g. Penicillin-class of antibiotic
5. Complete the relevant details:
6. Click **Save**



Orders
Favourite Folders

1. From the Main Menu select **Requests/Care Plans**
2. Click the button **+Add** button
3. Select the arrow next to the gold star
4. Select **Organise Favourites**
5. Click **Create Folder**
6. Name the folder
7. If creating multiple folders, use the **up/down** arrows to the right to rearrange
8. Close the window
9. Favourite orders can be added to these folders

Orders
Favourites

1. Select **Nurse Workflow**
2. Click the **Outpatient** tab
3. From the Workflow menu select **New Order Entry**
4. Search for the order you want to place
5. In the search results click the **Star** symbol next to the order
6. Select a folder to save the item into
7. Click **Add**
8. Your favourites will now show under **Mine**

Ordering Icons	
	Order Set
	Care Plan
	Order Basket
	Missing Required Details
	Inpatient
	Outpatient
	Favourite

Orders
Placing an Order

1. Go to the component **New Order Entry**
2. Type in the order you wish to place
3. Select the order from the search results
4. Enter Ordering Clinician information as appropriate
5. Click **OK**
6. Click the order basket
7. A summary of your orders will be shown, click **Sign**
8. Select each order
9. The number of missing details will be shown at the bottom of the window
10. The missing required details will be highlighted in yellow
11. Complete all fields as appropriate
12. Click **Sign** followed by **refresh**

See instructions on adjacent page for correct selections for each type of order

Phlebotomy
Collection Responses

Phlebotomy to collect sample

1. Are you collecting this sample now = **No**
2. Do you want to print the label = **No**
3. Collection Priority = **Outpatient Phlebotomy**

In the Order Profile in the Outpatient tab

- Order Status will display as **Ordered**
- Department Status will display as **Scheduled**

Person placing order to collect the sample

1. Are you collecting this sample now = **Yes**
2. Do you want to print the label = **No**
3. Collection Priority = **Routine or Urgent**

In the Order Profile in the Outpatient tab

- Order Status will display as **Ordered**
- Department Status will display as **Collected**

Colleague to collect the sample later

1. Are you collecting this sample now = **No**
2. Do you want to print the label = **Yes**
3. Collection Priority = **Routine or Urgent**

In the Order Profile in the Outpatient tab

- Order Status will display as **Ordered**
- Department Status will display as **Dispatched**

Collections Inquiry
Reprinting Labels

1. Click on **Collections Inquiry** on the toolbar
2. Select the **order(s)**
3. To print to a different printer to the one listed, click the **Label Printers** button at the bottom right corner and select a printer from the list
4. Click the **Labels** button
5. Select **All labels** and click **Print**
6. Status changes to **Dispatched**

Logging In a Collection

1. Click on **Collections Inquiry** on the toolbar
2. Select the order (that has a “Dispatched” status) to be logged in
3. Go to **Specimen Log In** on the toolbar 
4. Set the **Location** to **Phlebotomist** (bottom right of window)
5. Click the **Log In** button
6. The specimen will show a status of **Collected** once it’s logged in

Medications
Outpatient Prescribing

1. Go to the **New Order Entry** in the **Nurse Workflow**
2. Select **Given in Clinic** or **Outpatient Prescription** as appropriate
3. Type in the medication and select from the search results
4. Click the order basket 2 and click **Sign**
5. Complete the missing details and click **Sign**

Record Drug Administration

1. Select **Drug Chart** from the left hand menu
2. Check the details of the order
3. Click the red square to give that dose
4. Review and update the details as appropriate
5. Click **Sign** ✓

Medications
Nurse Supply

Medication prescribed via nurse supply can be viewed in the **Medication List** (patient record, main menu)

1. Click on the **Patient Task List** in the left hand menu
2. Click on the **Nurse Collect/Supply** tab
3. Double click on the task - **DO NOT CLICK THE YELLOW BOX**
4. The **Medication Supply Record** form will open
5. Enter the relevant details into the form
6. Click **Sign** ✓

Notes
Creating a Clinical Note

1. Select the note type from the bottom of the workflow
2. Finalise your text and click **Sign/Submit**
3. Enter a **Title** for your note and click **Sign**

Clicking **Save** will create a draft of the note so ensure you always **Sign/Submit** your notes when completed

Auto Text Copy

1. To copy a colleague's auto text, open **PowerChart** and go to **View** at the top of the screen
2. Select **Auto-Text Copy MPage**
3. Enter the surname of your colleague in the search bar
4. Select your colleague from the list, and click **OK**
5. Select your chosen auto text, and click **Copy**
6. Click **Copy** again in the message box
7. You will be asked to log out for the auto text change to take affect. You can choose if you want to do this now or later.
8. The auto text will now appear in **My Auto-Text Library**

Notes
Personal Note Type List

1. Click **Select Other Note** (bottom of light grey menu) in **Nurse Workflow.** This will take you to **Document Viewing**
2. Go to the top of the screen and click **View**
3. Select **Customise**
4. Find your speciality in the **All Available Note Types** list
5. Select a relevant note and click  to move it to the **Personal Note Type List**
6. Repeat for all the note types that you need
7. Use the drop down menu to select your **Default Note Type**
8. Click **OK**

Using Personal Note Type List

1. Set the **Note Type List Filter** to **Personal**
2. The **Type** will automatically choose your **Default Note Type**
3. The **Type** drop down list will now only show your selected note types

Notes
Creating Auto Text

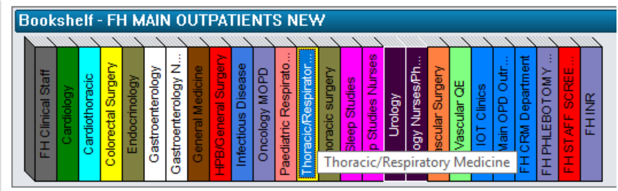
1. When in a note, click in a text box and then click the **Manage Auto Text** symbol
2. Click the **+** symbol
3. Create an abbreviated name for your auto text prefixed with the **@** symbol
4. Enter and format your text adding any additional data fields or drop down lists as required
5. Click **Save**
6. To use your auto text, click into a text box in your note, type the @ and choose from the list of auto text that will appear. You can narrow down the results by including the first letters of your abbreviation.

Global Auto Text

1. When in a note, click in a text box and then click the **Manage Auto Text** symbol
2. Select **Public**, and you can search for pre-made auto text that has been created by different specialities

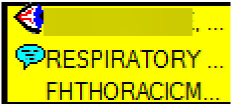
SchApptBook
Setting up the Bookshelf

1. Select the **View** menu from the Toolbar choose **Options** from the list
2. The Options Window displays - select the **Navigation Tab**
3. From the drop down, locate the bookshelf you would like to set as the default
4. A default Book can also be set to display on open
5. Click **OK** —the bookshelf will display



SchApptBook
Appointment Book Icons

1. Right click in any grey space of the **Appointment Area**
2. Select **Book Settings** followed by **Properties**
3. Select the **icons** Tab
4. Tick each item in the top section (**Slot icons**)
5. Select **Allergies, Comments** and C**hoose and Book** in the bottom section (**Appointment Icons**)
6. Click **OK**
7. You will now be able to click the image of the eye or comments icons against an appointment in the diary to view allergy information or scheduling comments



Appointment Enquiry
Viewing a Resource (Clinic)

1. From the **Bookshelf**, open the book that contains the clinic
2. Highlight the clinic name for the date you wish to view
3. Select the **Appointment Enquiry**  icon from the Toolbar
4. Click the **Find** button at the bottom left of the screen
5. The list of patient appointments will display
6. You will need to set preferences in order to display the correct columns—see next page

Appointment Enquiry
Setting Preferences

1. Follow the steps on the previous page (Viewing a Resource) to display a clinic using the **Appointment Enquiry**
2. Once a clinic is displayed, double click to open a patient appointment. The **Appointment View** window displays
3. Select the **General** tab
4. Right click in the area to the right of **Appointment Information**—select **Preferences**
5. Select items in the **Available Tabs** on the left, use the **right facing arrow** to move items to the **Selected Tabs** on the right
6. Use the **up and down arrows** to reorder columns in the **Selected Tabs**
7. Click **OK**
8. Click **Close**

The newly added/re-ordered columns display

Paper Documents

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

If you need to use any paper documents, follow the process below:

1. Open **Document Store Printing App** from the desktop of your computer
2. Select **Forms** from the menu on the left
3. Enter the patients MRN and click **search**
4. Select the relevant **Encounter**
5. Search for the **document type**
6. Print the **Document** or **Label**
7. Drop the document into a scanning tray for Medical Records Department when it is finished with

Need more support?

For more information and additional support go to the *IT Training Support* website, where you will find:

- Quick Reference Guides
- Detailed Guides
- Video Guides

Remember, if you need help, Service Desk is available 24/7 on 21000

“The irony of a paper guide for a Paperlite EPR is not lost on us, but we think this small guide is worth it to help you get the most out of the system.”

Version 2

Review Date: Nov 2025