The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Critical Care Nurse
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 ***eRecord*** through quick reference guides for common tasks.

Contents

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.

CareCompass

Creating Patient Lists

1. Click the List Maintenance button
2. Click New
3. Select Location
4. Click Next
5. Select ☐ Encounter Types
6. From the panel on the right select the **Encounter Types** for your specific ward i.e.

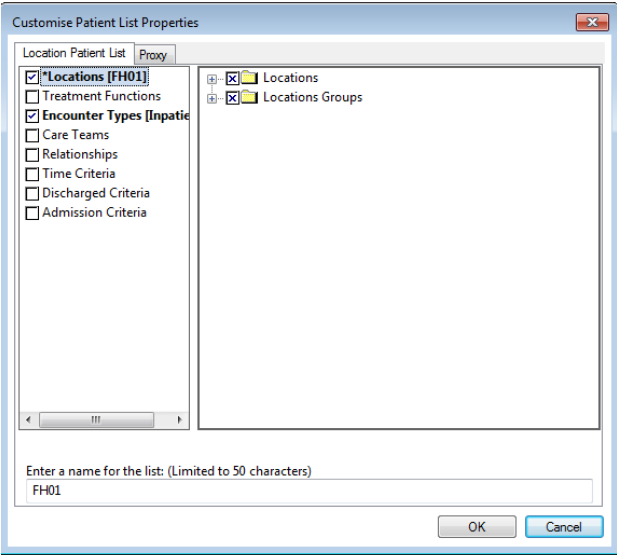
   ☑ Day Case
   ☑ Inpatient
   ☑ Regular Day Admission
   ☑ Regular Night Admission
7. Select ☐ *Locations
8. Click the + symbol *(panel on the right)* ⊞ ☒ Locations
9. Click the + for your hospital site ⊞ ☒ Freeman Hospital
10. Click the + to expand hospital site ⊞ ☐ Freeman

    *(**Do not** click in the empty square)*
11. Tick the box next to your ward ⊞ ☑ FH17
12. Click Finish
13. Select your ward from the **Available List** on the left
14. Click ➡ to move the list to the **Active List** then OK

CareCompass

List Properties

1. Select Short Patient List *(top of the screen)*
2. Once your list is set up you can make changes to it, if necessary, using the **Properties** button
3. This will open the **Customise Patient List Properties** box as shown below and from here you can rename and amend the **Location** and **Encounter** fields.



CareCompass

Establish Relationships

1. Choose a **Patient List** *(from drop down menu)* FH17
2. Click Establish Relationships
3. Select your role * Relationship
4. Review your list, tick or untick and then click Establish

Patient Information

Once a relationship is established additional patient information will be displayed:

1. The patient's Resuscitation Status Do Not Resus...
2. The patient's Allergy Status **No Known Allergies** **Allergies**
3. Hover over any section of patient information to see further details
4. If **No Allergies Recorded** is displayed, click on the text to update the Allergy Status

Assessment / Fluid Balance Icons	
	Conditional Field - will trigger additional field/s depending on the answer
	Calculated Field - will not calculate automatically 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

Assessments/Fluid Balance
Setting Up Navigator Bands

Recommended bands:

*Adult ICU Systems Assessment
*Adult ICU Lines and Devices
*Adult Quick View (for Capillary Blood Glucose and Ketones POC)
Intake and Output
Continuous Renal Replacement Therapy
Note: * has a paediatric equivalent

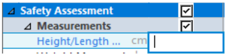
1. From the main patient menu click Assessments/Fluid Balance
2. Click View *(menu bar at the top of the screen)*
3. Go to Layout ▸ and then select Navigator Bands
4. From the **Available** panel on the left click on a Navigator Band to select it. Hold CTRL to multiselect bands.
5. Move the band/s to 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 *(top left)*
11. Reopen your patient's record from the Recent list, or from CareCompass
12. Click back into Assessments/Fluid Balance and your selected Navigator bands will now display

Assessments/Fluid Balance

Completing Assessments

1. Click **Insert Date/Time**  and select correct date/time
2. Double click in the title banner; puts a tick in the box and activates the column

3. This will guide you through the assessment and trigger calculations



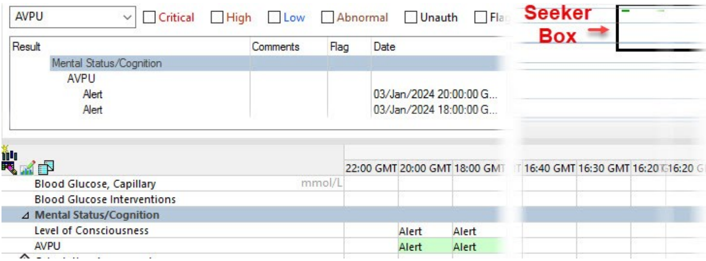
Keyboard Controls

1. Moving between fields: Use Tab key or Enter key.
2. Text entry fields: Type in box then press Enter key to submit
3. Select lists: Use the arrow keys to move to the answer and press the Enter key to submit
4. Multi select lists: Use the arrows to move through the list, use the Space bar to select, use the Enter key to submit

Search

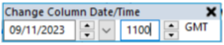
1. Select the **navigator band** you wish to search within.
2. Enter item name in **Find Item bar** or click on the down facing arrow to select from a list of search terms. 

3. Click on result to view on page, will be highlighted green.
4. If result not in field of view, move seeker box to green area



Lines/Devices

Insertion

1. Select Assessments/Fluid Balance *(patient record, main menu)*
2. Select the relevant **Navigator Band** e.g. Adult ICU Lines and Devices
3. Select the relevant **Line/Device**, e.g. Peripheral IV
4. Click **Insert Date/Time** and enter the correct time for the activity 

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

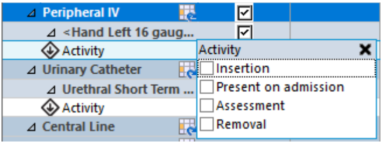
6. Click the **Repeatable Group** icon
7. The relevant **Label** box will open

Label:
<Peripheral IV Site:><Peripheral IV Laterality:><Peripheral IV Catheter Size:>

8. Select the relevant options for the line you are inserting i.e.

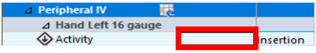
Label:
Hand Left 16 gauge

9. Click OK
10. The Activity field will automatically open
11. Select **Insertion**
12. Complete the relevant details
13. Click **Sign**

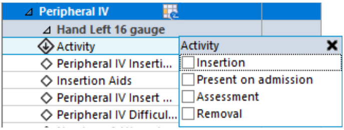


Lines/Devices Assessment

1. Click **Insert Date/Time**  and select the correct date and time for the activity
2. Double click in the Activity box for your Date/Time

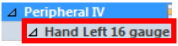


3. The Activity field will automatically open
4. Select **Assessment** from the list



5. Complete the relevant details and **Sign**

Removal and Inactivate

1. Click **Insert Date/Time**  and select the correct date and time for the activity
2. Double click in the Activity box for your Date/Time
3. Select **Removal** from the Activity list
4. Complete the relevant details and **Sign**
5. Right click on the line/device label e.g. 

6. Select Inactivate
7. The section is now greyed out and collapsed

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

Critical Care Workflow

Workflow Set Up

1. Select **Critical Care Workflow** *(patient record, main menu)*
2. Add a tab by clicking + and close a tab by clicking ×
3. Drag a tab or a menu item to change the order
4. To add or remove items from the menu click ☰▾ then Components ▸

Critical Care Summary & PICU Critical Care Summary

1. The **Critical Care Summary** and **PICU Critical Care Summary** tabs can be further customised
2. Click ☰▾ then View Layout ▸
3. You can then choose from the layout options
   One
   Two
   Three
4. To be able to move the boxes to the position of your choice, ensure **Drag and Drop** is ticked
   ✓ Drag and Drop
5. If you want to change the colours of the individual boxes, click the expand button on the box ☰▾
6. Then select Colour Theme
7. If you want to close any of the boxes, click on the upward facing arrow in the box ☰▾ ⌃
8. To expand the box again, click on the downward facing arrow ☰▾ ⌄
9. Each box has the Default Expanded ✓ turned on. You can untick this so that the box remains closed.

Critical Care Workflow

Admission-Adult Tab

1. Add the Admission - Adult tab to your workflow by clicking on the Critical Care Handover × + plus sign and select choice from list.
2. Sections can be completed in any order, unless advised otherwise
3. **Patient Information** is pulled from PM Office, and must be edited in PM Office
4. **Emergency Contacts Details**, **General Patient Information**, **Admission Adult Baseline Risk Assessment** and **Activities of Daily Living** all have forms, which can be accessed by clicking + ⌄
5. **Admission Adult Baseline Risk Assessment** contains multiple forms
   - Admission Adult Baseline Risk Assessment
   - Audit C Alcohol Care Pathway
   - Infection Risk Assessment - Adult
   - Safeguarding Adults Cause for Concern
   - Smoking Cessation - Inpatient
   - Safety Assessment
   - Adult Lines - Devices
6. **Friend and Family Communication**, and **Admission Summary and Plan**, can be set to appear as a third column by clicking
7. Generate **Nursing Admission History Adult** note by clicking on link towards bottom of Admission-Adult tab column. Data entered in fields and ad hoc forms from this page pull through to note.

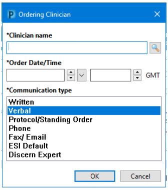
   Create Note
   Nursing Admission History Adult

> **!** There should be no outstanding questions before the patient discharge. The **Nursing Admission History** note must be created *(bottom left hand side of screen)* and then **signed** or it will not be classed as completed.

Ordering Tests

Placing an Order

1. Select **Requests/Care Plans** *(patient record, main menu)*
2. Click **+ Add**
3. Search for the order you want to place, e.g. Search: sputum
4. When searching, ensure the filter is set to ‘Contains’ Contains / Contains / Starts with
5. Click on your chosen order
6. Enter **Ordering Clinician** information *(if required)*
   Change name of clinician if needed.



7. Repeat to place multiple orders
8. Click Done
9. Click on your order
10. If your order needs additional information, this icon ⊗ will appear next to it. You can also see the number of missing details 4 Missing Required Details at the bottom of the screen.
11. Select each order and complete any missing required details.
12. Mandatory fields appear in bold, and if they have not been automatically filled, they will be highlighted in yellow.

***Collection Priority:** Urgent ***Specimen Type:**

13. For multiple orders, select all by left clicking the mouse and dragging down, fill in common ‘Missing Required Details’
14. Click Sign

Ordering Tests
Bloods Add On

Can add on extra lab tests (excluding Microbiology and Virology) to a blood sample that has already been sent to the lab using this method:

1. Select Requests/Care Plans *(patient record, main menu)*
2. Search for and select Add on lab test - Blood Sciences
3. Fill in all mandatory fields (highlighted in yellow). **Specimen Number** refers to Accession number but if unknown, can put '*unknown*' or '*most recent request*' and lab will assign.

*Test Required:
*Reason Why:
*Specimen Number (if Known):
*Referrers Contact Details:

4. Click Sign

! Urgent requests must be phoned in.

Ordering Tests
Creating Favourites

To save order as a favourite, BEFORE signing:

1. Right click on the order and select Add to Favourites from the drop down list.
2. Saves to highlighted folder. Create new folders by clicking '*New Folder*' and type in name.
3. Click **OK**
4. Your favourites will show when you click the button
5. Click (to the right of the star icon) to organise favourites.

Ordering Tests

Icons

Ordering Icons	
	Order Set
	Care Plan
	Missing required details
	Discharge Medication
	Inpatient
	Outpatient
	Favourite

Care Plans

Suggested Care Plans

1. Click the **+** next to **Suggested Plans (2)**
2. Select each plan and click Initiate Now or Accept to set the plan to be initiated at a later time, or Reject
3. Once accepted the plan will appear in the section Plans
4. Some orders will create a scheduled Task on the Patient Task List, e.g. Falls Assessment

Document in Plan

1. Select Document in Plan
2. Click each item to document each outcome (or use the quick document buttons
3. Click Sign Documentation

Care Plan Icons	
	Goal
	Note
	Indicator
	Intervention
	Order

Care Plans

Adding a Care Plan

1. Click Requests/Care Plans *(patient record, main menu)*
2. Click Add
3. Type in the name of the care plan you wish to add, e.g.

   Search: critical

4. When searching, ensure the filter is set to 'Contains' (Contains / Contains / Starts with)
5. Click the relevant care plan from the results, e.g.

   Critical Care - Too Unstable to Turn Care Plan - Adult

6. Review the components of the Care Plan
7. Add or Remove components with the
8. Add extra components with Add to Phase
9. Click Initiate Now
10. Click Orders For Signature
11. Select any order with missing required fields
12. Complete any missing required details
13. Click Sign
14. Click Refresh
15. The Care Plan is ready to document

Notes

Setting your 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

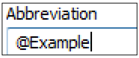
1. Set the **Note Type List Filter** to **Personal**
2. The **Type** will automatically choose your **Default Note Type**
3. The **Type** drop down list will now only show your selected note types

Templates

1. If using the ☆ Free Text Note template, ensure you have given your note a meaningful title. Otherwise, the note will be called ’Free Text Note’.
2. You can click on the stars next to the names of templates to add them to your Favourites, e.g. ★ Free Text Note

Notes

Creating Auto Text

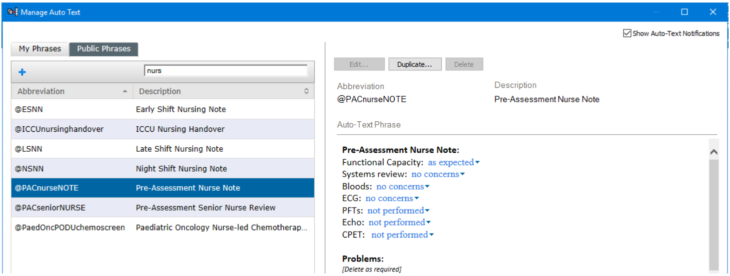
1. When in a note, click in a text box and then click the **Manage Auto Text** symbol
2. Click the symbol
3. Create an abbreviated name for your auto text prefixed with the @ symbol 

4. Enter and format your text adding any additional data fields or drop down lists as required
5. Click 

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 premade auto text that has been created by different specialities



Notes

AutoText Copy MPage

1. To copy a colleague's autotext, such as **@critcare/nursingnarrative,** click View (*top grey menu bar*)
2. Select Auto-Text Copy MPage
3. Enter colleague surname in search bar Search User
4. Select your colleague from the list, and click OK
5. Select your chosen autotext, hold CTRL to multiselect, and then click Copy
6. Click Copy again in the message that appears
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 autotext will now appear in My Auto-Text Library

Creating ICU Handover Note

1. In Critical Care Workflow, select Critical Care Handover tab.
2. Select ICU Handover from the note types at the bottom of the tab menu.
3. Insert autotext "**@critcare/nursingnarrative**" in the **Daily Assessment and Plan** field.
4. Complete the required sections in the note, including the inserted autotext.
5. Click Sign/Submit
6. Submit your note by clicking Sign

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

Ad Hoc Forms

Creating a Form

1. To create an **AdHoc** form, click the AdHoc button *(in the menu towards the top of the page)*
2. Select the folder that holds your chosen form, e.g. Basic Care
3. Click the box next to chosen form, e.g. Mental Capacity Assessment
4. Click Record
5. Set the correct date/time *Performed on:
6. Complete and/or read the relevant sections
   Mental Capacity A
   MCA 1 Guidance
   MCA 2 Best Intere
7. A indicates a section that has mandatory parts to complete or read. Mandatory fields are highlighted in yellow.

   STAGE 1 - IS THE INDIVIDUAL ABLE TO MAKE THE DECISION?

   Do you consider the individual is able to understand the information relevant to the question?

   Yes No
8. You can choose to cancel, save, or sign your form.
9. If you have saved or signed your form, you can then view or modify it in Ad-Hoc Forms *(blue bar, left-hand side)*

Useful Form Locations

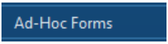
Basic Care > Mental Capacity Assessment

Safeguarding > Safeguarding - Paediatric Cause For Concern & Information Sharing
Safeguarding Adults Cause for Concern

Surgery > Pre-Operative Ward Checklist

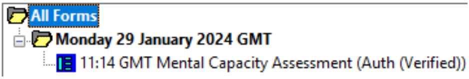
Ad Hoc Forms

Viewing or Modifying a Form

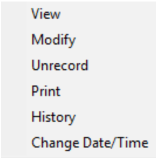
1. To view or modify an Ad Hoc form, go to 

(blue bar, left-hand side).

2. Select the form you wish to view/modify

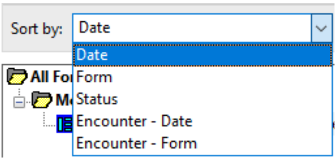


3. Right click on the form and select your action.



4. If you make changes to the form, you must remember to sign again.

5. Forms can be sorted according to **Date**, **Form**, **Status**, **Encounter-Date**, and **Encounter-Form**, which is useful if a patient has a large number of forms.

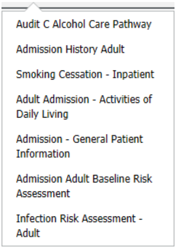


Dashboards

Setting Up Ward Dashboard

1. Click on **View** *(top of the screen)*, and then select **Ward Dashboard**
2. Check that you are viewing the correct patient list - they should match the patient lists you created in **CareCompass**
   List: RV38C (20)
3. Click Establish Relationships
4. Click **Select all** and then **Submit**

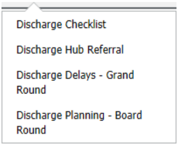
Admission Forms



1. Select the Admission tab
2. Click in the **Documentation** column for the patient
3. Click Create
4. You can then select the appropriate form from the options

Discharge Forms

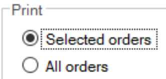
1. Select the Discharge tab
2. Click in the **Documentation** column for the patient
3. Click Create
4. You can then select the appropriate form from the options



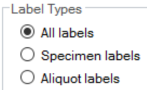
Collections Inquiry

Reprinting Labels

1. From within the patient record, click the Collections Inquiry button (grey menu bar, top of screen)
2. Can either print **all** or **selected orders**. To select multiple orders, hold the Ctrl key while clicking on each order.
3. Ensure correct printer selected from dropdown at bottom right of page, *Label printers: dumbspeclbl
4. Click on Labels, bottom right of page.
5. Choose either **Selected orders** or **All orders**



6. Choose the label type

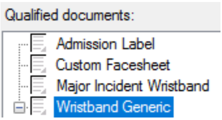


7. Click Print

PMOffice

Reprinting Wristbands

1. Open PMOffice by clicking on **Links** (grey menu bar, top of screen) and select **PMOffice** from drop down list.
2. Select **Task** from the main menu, then **Documents**
3. The **Person Mgmt: Documents** window will open.
4. In top left corner, click 
5. Search for the patient, then select the correct encounter. Click OK
6. Select the item for reprint, **Wristband Generic**



7. In top left corner, click 

Capacity Management

Rapid Response Clean

1. From the **Bed Board**
2. Select the bed
3. Click the **Adhoc Clean** button and click ‘*Request Adhoc Clean*’
4. Select the ‘Priority’ and complete the ‘*Adhoc Job Details*’

Ordering Equipment

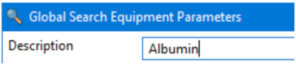
1. From the **Equipment List**
2. Click ‘*Global Search*’
3. Enter the description and click search
4. Select the equipment with your ‘*Owning Location*’
5. Click ‘*Request Adhoc Transport*’ button
6. Complete the ‘*To*’ destination and ‘*Transport Details*’

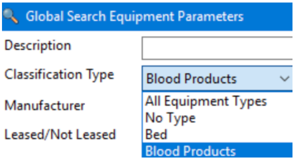
Capacity Management

Order Porter for Blood Product Collection

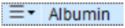
Do not use in emergency, phone for a porter directly.

1. Select **Equipment List**
2. Click on '*Global Search*'
3. Search by **Description** or **Classification Type.**





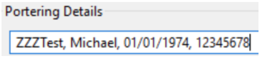
4. Select required blood product with correct '*Owning Location*'
5. Click button to the left of the blood product



6. Select Portering > Request Adhoc Portering
7. Complete the request form:

   A. Use ellipsis (…) to select destination

   B. Enter Surname, Forename, DOB and MRN in Portering Details

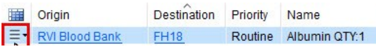


8. Nurse receiving the blood must complete the job

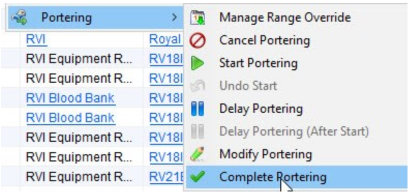
   A. Click on Personalization> My Gadgets> **Portering List** to enable.

   B. Select Portering List tab

   C. In line of interest, click on



   D. Select Portering > Complete Portering to complete task.



Need more support?

For more information and additional support, click on the QR code to go to the IT Training website where you will find:

- Video Guides
- Quick Reference Guides
- Detailed Guides

For further assistance, please contact us:

IT Training Team
Call on 37373
nuth.it.training@nhs.net

Service Desk
Available 24/7
Call 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.

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