NHS

The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Inpatient Nurse *e*Record 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.

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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.

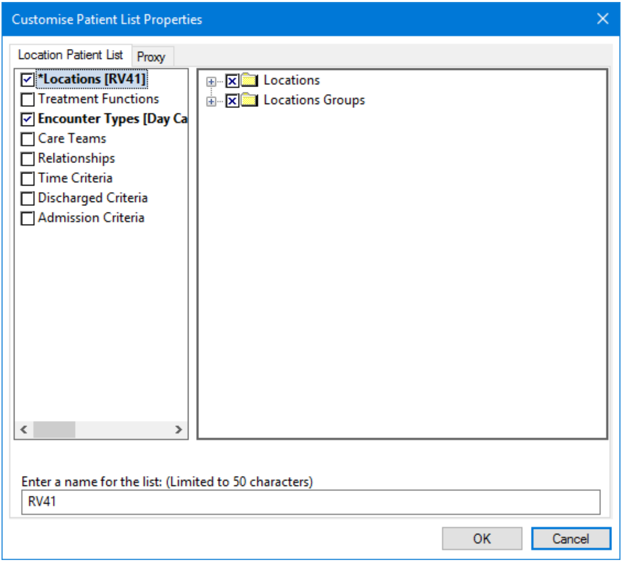
CareCompass
Creating Patient Lists

1. Click the **List Maintenance** button
2. Click **Next**
3. Select **Location**
4. Click **Next**
5. Select **Encounter Types** from the left panel
6. From the panel on the right select the **Encounter Types** for your specific ward:
    - *Day Case*
    - *Inpatient*
    - *Regular Day*
    - *Regular Night*
7. Select **Locations** from the left panel
8. Click the **+** symbol next to the locations
9. Click the **+** for your hospital site
10. Click the **+** to expand the hospital site (Do not click in the empty square)
11. Tick the box next to your ward
12. Click **Save**
13. Select your ward from the **Available List** on the left
14. Click to move the list to the **Active List** then click **OK**

CareCompass
List Properties

To edit the properties of a list created in CareCompass, this must be done from within Short Patient List as follows:

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

CareCompass Icons	
	Immediate Priority
	Critical Results
	Non-Critical New Information
	Critical New Information
	High Risk Alert
	Clinical/Non-Clinical Risk
	Medication Activity
	Patient Care Activity
	Patient Assessment Activity
	Other Activities

CareCompass
Patient Information

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

1. The patient's **Resuscitation Status** and **Allergy Status** is displayed
2. If **No allergies recorded** is displayed, click on the text to update the **Allergy Status**
3. Hover over any section of patient information to see further details

Activities

The Activities column shows the number of outstanding Activities

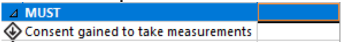
1. Open the activities by clicking the displayed number
2. Select a tab:
    - Scheduled/Unscheduled
    - PRN/Continuous
    - Plans of Care
3. Select a time frame
4. Use the filter to select/de-select the activity type
5. Select an activity e.g. **Nursing Shift Assessment**
6. To complete an activity click **Document**
7. To remove an activity click **Not Done** and enter a reason.

Assessments/Fluid Balance
Setting Up Navigator Bands

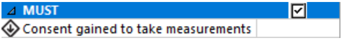
1. From the main patient menu click **Assessment/ Fluid Balance**
2. Click **View**(menu bar at the top of the screen)
3. Go to **Layout > Navigator Bands**
4. From the **Available** panel on the left click on a Navigator Band to select it
5. Move the band to the **Current** panel on the right using 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. 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



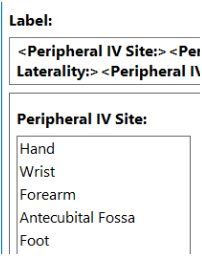
Keyboard Controls

1. Moving between fields: Use **Tab** or **Enter**
2. Text entry fields: Type into the box then press the **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

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

Lines/Devices Insertion

1. Select **Assessment/Fluid Balance**
2. Select the relevant **Navigator Band**
3. Select the relevant **Line/Device**
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
8. Select the relevant options for the line you are inserting i.e.



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 click **Sign** ✓

Removal

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
6. Select **Inactivate**
7. The section will now clear

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

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
Admission Tab

1. Add the **Admission - Adult** tab to your workflow
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**, and **Activities of Daily Living** all have forms, which can be accessed by clicking + v
5. **Admission Adult Baseline Risk Assessment** has multiple forms
6. **Histories** is accessed by clicking on the title ‘Histories’
7. **Friend and Family Communication**, and **Admission Summary and Plan**, can be set as a third column by clicking the arrow >|
8. Some sections, such as **Clinical Notes** and **Visits** can be expanded by clicking on the right facing arrow and closed again by clicking on the downward facing arrow

There should be no outstanding questions before the patient is discharged.
The **Nursing Admission History** note must be completed or it will not be classed as a completed admission.

Ordering Test
Placing an Order

1. Select **Nurse Workflow**
2. From the **Workflow** menu select **New Order Entry**
3. Search for the order you want to place
4. Click the order from the search results
5. Enter Ordering Clinician information
6. Click **OK**
7. Repeat to place multiple orders

Signing the Order

1. Click on the order basket 2
2. A summary of your orders will be shown
3. Click **Sign**
4. If any of the orders need additional information they will appear with a blue circle and white cross inside
5. Select each order and complete any missing required details
6. For multiple orders, select all by clicking the mouse and dragging down, to fill in common missing required details
7. Click **Sign**

Ordering Tests
Creating Favourites

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

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

Care Plans
Suggested Care Plans

1. Click the **+** next to **Suggested Plans**
2. Select each plan and click **Initiate Now**
3. Once accepted the plan will appear in the **Plans** section
4. Some orders will create a scheduled task on the **Patient Task List**
5.

Document in Plan

1. Select **Document in Plan**
2. Click each item to document each outcome
3. Click **Sign Documentation**

	Care Plan Icons
	Goals/Targets
	Interventions
	Key data recorded elsewhere
	Supporting clinical guidance
	Referrals
	Suggested associated Care Plan

Care Plans
Adding a Care Plan

1. Click **Request/Care Plans**
2. Click **+ Add**
3. Type in the name of the care plan you wish to add
4. Click on the relevant care plan from the results
5. Review the components of the Care Plan
6. Add or Remove components with the ☑
7. Click **Initiate Now**
8. Click **Orders For Signature**
9. Select any order with missing required fields
10. Complete any missing required details
11. Click **Sign**
12. Click **Refresh**
13. The Care Plan is ready to document within

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

Notes
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**

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

Patient Task List
Task Completion

1. Select **Patient Task List**
2. Choose an appropriate tab to view
3. If documenting on a tasks, double click on the task
4. If marking a task as completed, click in the yellow box
5. You may be asked to enter the date/time of completion
6. The task should now be classed as completed ✓

Reschedule/Record Not Done

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

Patient Task List Icons

A list of all of the icons used within the Patient Task List can be found on the screen

1. Click the **Options** menu at the top of the screen
2. Select **Task-at-a-Glance Legend**
3. A list of icons will open up

Patient Task List
Change Timeframe

1. Right click on grey date bar, select **Change Time Frame Criteria**
2. Select the time frame option you want to view
3. Set the Date/Time range at the bottom of the screen
4. Click **OK**
5. Tasks for that Date/Time range will now show
6. Remember to return the time frame back to **Defined Time Frame**

Dashboards
Setting Up a 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
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. Click the **Collection Inquiry** button, from the top menu, while in the patient record
2. If reprinting selected orders, click on those orders
3. Then either go to **Task**, then **Print**, or click on the **Print** button
4. Choose either **Selected orders**, or **All orders**
5. Choose the label type
6. Click **Print**

PMOffice
Reprinting Wristbands

1. Open **PMOffice**
2. Select **Task** from the main menu, then **Documents**
3. The **Person Mgmt: Documents** window will open. Select **Action**, then **Find Person**
4. Search for the patient, then select the correct encounter. Click **OK**
5. Select the item for reprint
6. Then either go to **Task**, then **Print**, or click on the **Print** button

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

Capacity Management
Admit a Patient

1. From the **Transfer List**
2. Click on the **PMOffice** button on the transfer list
3. Select the **Admission Conversation**
4. Complete the admission conversation

On Ward Bed Swap

1. From the **Bed Board**
2. Click the **Bed Swap** button
3. Drag the first patient over the top of the second patient

On Ward Bed Transfer

1. From the **Bed Board**
2. Drag the patient from their bed to an available bed
3. Select the Transfer **Reason>Bed Swap on the Ward**
4. Click the **Transfer** button
5. Click **Complete**

Capacity Management
Ward Transfer: Sending Ward

1. Select a patient
2. Click the **Transfer** button
3. Click **Transfer Patient**
4. Select the **Mode of Transport** and **Transport Details**
5. Select the destination ward from the **Transfer List**

Ward Transfer: Receiving Ward

1. From the **Transfer List**
2. Drag the patient from the **Transfer List** onto a bed on the **Bed Board**
3. Select **Dispatch Transport** and select the **Transfer Reason**

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 Discharging Patients

1. From the **Discharge List**
2. Select the patient, click on the **PMOffice** button and click **Discharge**
3. Complete the **Discharge Conversation**

Discharge – Deceased Patient

1. From the **Discharge List**
2. Select the patient, click the **Discharge** button and click **Start Discharge**
3. Click the **Discharge** button again and click **Dispatch Transport**
4. Select the **Mortuary**
5. Wait until the Porters have started the job
6. Click the **PMOffice** button and click **Discharge**
7. Complete the **Discharge Conversation**

Rapid Response Clean

1. Select the bed
2. Click the **Adhoc Clean** button and click **Request Adhoc Clean**
3. Select the **Priority** and complete the **Adhoc Job Details**

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

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