The Newcastle upon Tyne Hospitals
NHS Foundation Trust

Theatre/Recovery 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.

Perioperative Tracking

Locate Patient

1. **Perioperative Tracking** is default landing page and can be accessed from the **View** (top grey menu bar) drop down menu.
2. Select your theatre whiteboard, e.g. FH Central Ops Whiteboard
3. If desired, **Filter** to select a theatre, e.g. Filter: FH Central Ops Th08
4. Click on header entitled Patient Name to sort patients alphabetically.

Accessing Patient Record

1. Double click on the patient's name, e.g. Patient Name ZZZSIMPSON, HOMER

Or

2. Right click on the patient's name.
   Select Open Patient Record
   Select the section of the patient record you wish to access

Check In Patient

1. Click on Perioperative Documentation
2. Click on case documentation icon
3. **Check In** window opens. Complete details. Click OK

!

- Patient must be checked in for Anaesthetic Record to be finalised.

Perioperative Tracking Icons

Perioperative Tracking Buttons	
	Scheduling Appointment Book
	Surgical Case Check In
	Mass Checkout
	Open Patient Record
	Update Anticipated Theatre

Allergy Icons	
	No Allergy Information Documented
	No Known Medication Allergies
	No Known Allergies
	Allergies Documented

Case Selection

Locate Patient

1. **Case Selection** can be accessed from the **View** (top grey menu bar) drop down menu.
2. Click on location Location (FH Central Ops)... and choose correct area from the options. Click OK.
   Do not click on + to expand options.
3. You have 5 search options. The system will automatically be set to today's date, but you can change the date or select a different search option.

   Select By:
   - Date
   - Patient
   - Case Number
   - Clin Staff
   - MRN
4. Each option has mandatory fields, e.g. MRN:
5. Enter your search criteria and click Retrieve

Check In a Patient from Case Selection

Method 1

Select the patient and click the Checked In box

Checked In

Method 2

Select the patient and click ✓ Check In...

Method 3

Right click on the patient's name.

Select ✓ Check In...

Check In window will open. Complete details. Click OK

!

- Patient must be checked in for Anaesthetic Record to be finalised.

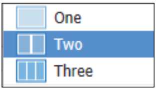
Recovery Workflow

Workflow Set Up

1. Select Recovery 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

Perioperative Summary

1. The **Perioperative Summary** tab can be further customised
2. Click then View Layout
3. You can then choose from the layout options



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
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.

Notes

Setting your Personal Note Type List

1. Click Select Other Note *(bottom of light grey menu)* in **Recovery 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

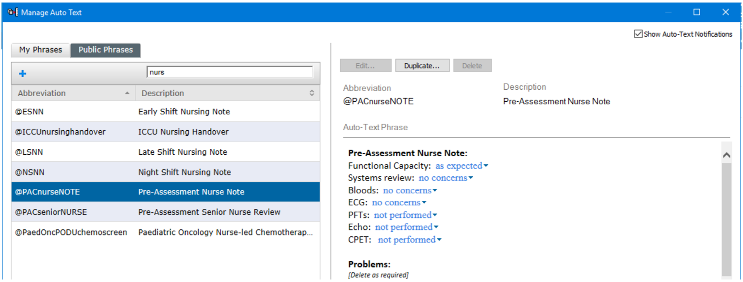
Notes

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 premade auto text that has been created by different specialities



Notes

AutoText Copy MPage

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

Creating a Recovery Handover Note

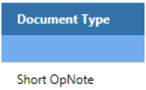
1. From within patient record, click on Recovery Workflow
2. Select Recovery tab
3. Select Recovery Handover Note from bottom part of menu. Data pulls from assessments/fluid balance into note fields.
4. Manually add additional text where required.
5. Click Sign/Submit
6. Submit your note by clicking Sign

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

Document Store

OpNote

1. To locate an OpNote, go to **Document Store** *(left blue bar, patient record)*
2. The **Document Type** column is on the right hand side of the screen



3. Double click on the document to open
4. If the document says, **DRAFT DOCUMENT** it has not been finalised.
5. Post-operative instructions are found towards the bottom of the document in the Operation Details section or Additional Details section.

Copying Text into Recovery Handover Note

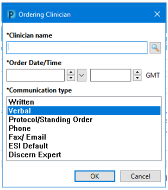
1. Highlight text to copy.
2. Ctrl + C will copy the highlighted item.
3. Open new location and place cursor where you wish to insert text.
4. Ctrl + V will paste the copied item.

> **!** A post-operative patient will not be accepted onto a ward until the OpNote is completed and signed by the surgeon.

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 i.e. Search: sputum
4. When searching, ensure the filter is set to **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 at the bottom of the screen.

    4 Missing Required Details

11. Select each order and complete any missing required details.
12. Mandatory fields appear in bold, and if they have not been automatically completed, they will appear in yellow.

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

13. For multiple orders, select all by left clicking the mouse and dragging down, to 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.

Icons

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

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

Required bands:
Recovery Lines-Tubes-Devices
Recovery Quick View
Recovery Systems Assessment
Intake and Output

Other useful bands:
PACU
Adult ICU Lines and Devices
Adult ICU Systems Assessment
PICU Lines-Devices
PICU Systems Assessment

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, **Perioperative Tracking** or **Case Selection**
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 the correct date/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 

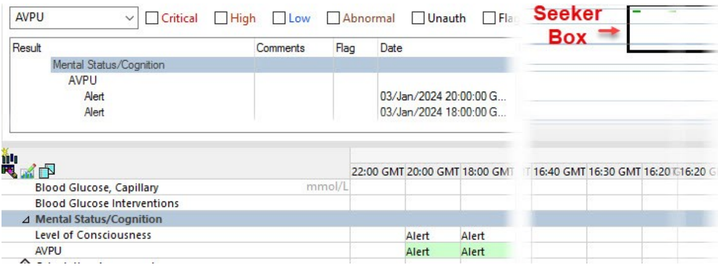
Keyboard Controls

1. Moving between fields: Use Tab 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

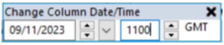
1. Select the **navigator band** you wish to search within.
2. Enter item name in **Find Item bar** or click on the down facing arrow to select from a list of search terms. 

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.



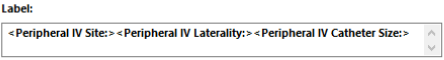
Lines/Devices

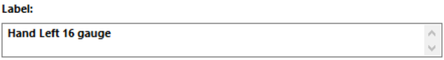
Insertion

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

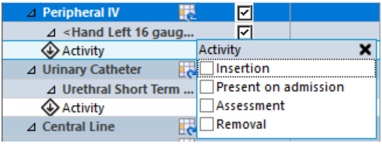
5. Double click the title banner in the appropriate time column 

6. This will put a tick in the box and activate the column for data entry 

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

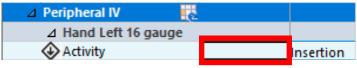
9. Select the relevant options for the line you are inserting i.e. 

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

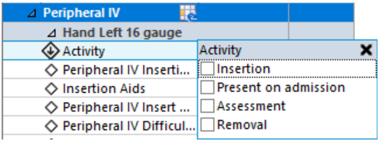


Lines/Devices
Assessment

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



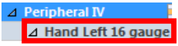
3. The Activity field will automatically open
4. Select **Assessment** from the list



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.

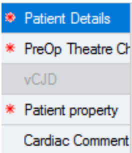
! Ensure all steps are recorded in the correct time column for the time you are completing the action.

Ad Hoc Forms

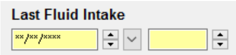
Creating a Form

1. To create an **Ad Hoc** 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. Surgery
3. Click box next to your chosen form, e.g. Pre-Operative Theatre Checklist
4. Click Record
5. Set the correct date/time

6. Complete and/or read the relevant sections
7. vCJD is greyed out by default. This page becomes active if answer Yes to “CJD Risk?” in the PreOp Theatre Checklist page.



8. A indicates a section that has mandatory parts to complete or read. Mandatory fields are highlighted in yellow.



9. You can choose to cancel, save, or sign your form.
10. 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

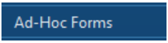
Safeguarding > Safeguarding - Paediatric Cause For Concern & Information Sharing

Safeguarding Adults Cause for Concern

Surgery > Pre-Operative Theatre Checklist

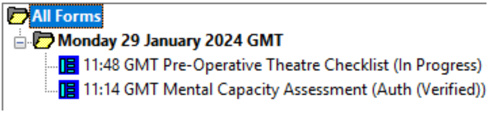
Ad Hoc Forms

Viewing or Modifying a Form

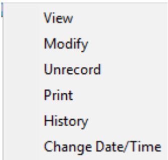
1. To view or modify an Ad Hoc form, go to 

(blue bar, left-hand side)

2. Select the form you wish to view/modify

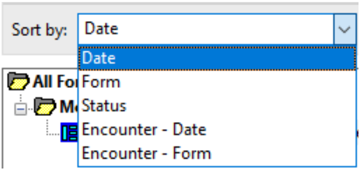


3. Right click on the form and select your action



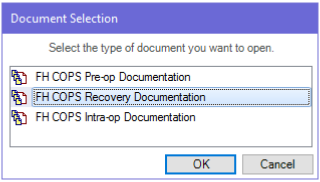
4. If you make changes to the form, you must remember to sign ✓ again

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.



Perioperative Documentation Navigation

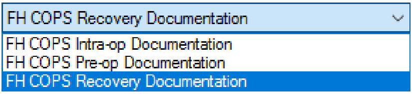
1. Click on **Perioperative Documentation** *(left blue bar in patient record)*
2. If the patient has not been checked in, click Check In... in the window that appears and go through the check in process
3. Select which type of documentation you wish to complete and click OK



4. The Case Overview should appear. Switch to Case Documentation by clicking the button

Case Documentation

1. You can switch between document types using the dropdown list



2. Each section has segments. Segments with this symbol are mandatory ! e.g. ! **FH COPS Recovery Case Staff**
3. You can navigate through the segments using << Prev Next >> or by clicking on the name of each segment

Perioperative Documentation

Adding Segments

1. To add a segment to the documentation, click
2. The Add Segment window will open
3. In the **Available** section, select the required segment, e.g.

   FH COPS Recovery Canc/Postponements
4. Click > to move the segment into the **Selected** section
5. Click OK
6. The segment will now be added to the documentation

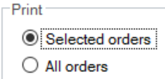
Finalising

1. To finalise the documentation, click
2. If any mandatory documentation is incomplete, it will now be listed in the Documentation Deficits window

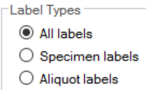
Collections Inquiry

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

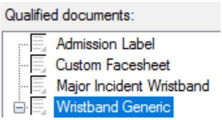


7. Click Print

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 

Reporting Portal

Theatre Lists

1. Open **Reporting Portal** from **eRecord**
2. Go to Filters and select ☑ Theatre Reports (6/6)
3. Select Theatres List from the options
4. Click Run
5. A **Prompt** window will open. In the Output to File/Printer/MINE option, you can choose to view the list (MINE) or select a printer.
6. Set the Trust option to THE NEWCASTLE UPON TYNE HOSPITALS I
7. You can then select your Facility from the drop-down list, e.g. Royal Victoria Infirmary
8. You can choose to generate a list for an entire Surgical Area e.g. ☑ RV Theatre Suites
9. You can also generate reports for a specific Theatre Room e.g. ☑ RV LW Th07
10. Ensure you have selected the correct **Start Date** and **End Date** for your report. The system will default to today's date.
11. Click Execute Your report may take a few moments to generate.
12. You can then choose to save or print the final report

SchApptBook

Emergency List

1. In **SchApptBook**, click the 'Request List Enquiry' button 

2. **Request List** will open. In the Enquiry: section, select:

   Emergency Theatre Scheduling List

3. In the Request List Queues: section, select the appropriate emergency theatre, e.g.

   FH Emergency Theatres

4. Click Find

5. The scheduling list will now appear. All the cases with a case status of **Ready** will be on this scheduling list:

Patient Name	Theatre Location	Case Status
ZZZTESTING, GORDON		Ready
ZZZTESTING, ISOLATION		Ready

6. Right click on your chosen patient, and select **Schedule** from the menu

7. The **Appointment Attributes** window will now open. Fill in the relevant information in the **Details** tab

8. Click on the Orders tab.

9. Select the **Search** tab within **Orders**. Type in part of your procedure and click **Enter**. Options will then appear.

   Search | Existing Orders | Privileges | AOS | Required

   card

   CARDIAC BIOPSY
   CARDIAC DEFIBRILLATOR EXTRACTION
   CARDIAC THROMBUS REMOVAL

10. Double click your procedure and complete the relevant information in the screen that opens on the right hand side

SchApptBook

Emergency List (cont.)

11. Click OK
12. Click in your chosen theatre, e.g. FH COPTh09 [0]
13. Click on your chosen time, e.g.

14. Click Schedule *(upper right of screen)*
15. Check details in confirmation window. Click OK
16. Click Confirm *(upper right of screen)*
17. In the confirmation window, select the General tab and check that the Encounter Type is set to Inpatient
18. Click OK
19. Your theatre booking should now have turned blue and say Confirmed

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.

Review Date: July 2024

Healthcare at its best
with people at our heart