



Mini Manual

Case Note Folders Management

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Support available:
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Create New Media Type

1 CREATE NEW MEDIA TYPE

In Millennium, we can create media (folders) for different types of case note (e.g. Purple Temporary Folders, Emergency Temps, Matt Packs etc). We need to track these independently from the main notes folder. Main folders can ONLY be created by Medical records.

Temporary media can be created on millennium by authorised areas and users. Allowing folders or loose paperwork to travel about the Trust uncreated or untracked on Millennium introduces a direct risk to patient care and effects case note provision across the Trust.

Tracking with a case note comment as with TDS is not acceptable.

If you are unable to create media yourself on millennium phone Medical Records to create the media for you.

Step 1. Open **HIM Tracking**

Step 2. Open the patient record by **scanning** the barcode into the **Tracking ID** field

Tracking ID:

OR search for the patient manually by clicking the

Find Patient icon  and searching by **MRN**

MRN:

Step 1. Click the **Create New Media** icon 

Step 2. Location View: Select the **location** you want to create the volume within

Step 3. Select the **media type**

Step 4. Select the **location** from the list

Print Barcode Labels

Step 5. Click **Create Volume**

Step 6. Check you have selected the correct media and patient before continuing. Click **Yes** if correct.

Step 7. Select the Organization: **Royal United Hospital**

The system confirms the creation of the media and gives you a tracking ID for it.

Step 8. Click **OK**

Result: There is a new media type created that can be tracked independently of any other media within the patient record.

Caution: If you are tracking anything other than a main volume, it is vital that this media is created on the system. Only certain staff (e.g. a Ward Clerk or Medical Records) will have the access to do this, so if you are unsure consult with your line-manager.

2 PRINT BARCODE LABELS

In Millennium, all case notes are tracked by scanning the barcode label on the folder. Each casenote folder has a unique barcode and tracking ID



Barcodes can only be printed by areas which have a dedicated barcode printer.

Step 1. Right-click on the **volume/media** you wish to print labels for

Step 2. Select **Print Labels**

Step 3. Select **Selected Records**

Purge Media

If you need to **track a case note which does not have a barcode**, click the **Find Patient** icon, search for the patient, select the relevant folder and update the location.

If you need to track a **batch of case notes without barcodes**, click the **Batch Update** icon, select the **location**, type the **Tracking ID** into the Tracking ID field and press **enter** to proceed to the next casenote.

3 PURGE MEDIA

If you have physically merged temporary notes back into a main volume of case notes, you will have to also purge that temporary media from the system so that it no longer gets tracked by mistake.

Step 1. Click the **Purge Volume** icon 

Step 2. Select the temporary media you wish to purge

Note: *The system will only allow you to purge medias without an associated encounter*

Step 3. Click **Purge**

Result: The media is purged from the patient record.

4 If you are unable to purge media on millennium

Step 1. **Physically merge** the temporary case notes with the main volume

Step 2. In HIM Tracking track the **main volume** to medical records or other location

Step 3. Track the **temporary** media to **Medical Records, To Be Purged**

Medical Records will monitor this tracking location and purge any medias tracked to it.

View Tracking History

5 VIEW CASE NOTE TRACKING HISTORY

You may wish to view the movement history for a case note volume.

Within the patient record in the right-hand pane, you should see a list of the different patient medias/volumes.

Step 1. Double-click on the **volume**

The tracking history of this volume opens

Movement History of 'MAIN-0000818194' (Range: ALL)	
New Location	Previous Location
SB to File Med Rec Library x...	Clinical Coding Coding Depart x1...
Clinical Coding Coding Depart x...	Cardiology Day case Unit
Cardiology Day case Unit	Acute Stroke Unit
Acute Stroke Unit	MRD Filed Med Rec Library x...
MRD Filed Med Rec Library...	MRD Uncreated File Med Rec x...
MRD Uncreated File Med Re...	

Step 2. Double-click on one of the locations. This will condense the volume so it only shows the current volume location.

Business Rules

Relevant Business Rules

- 1.) All Case Note media must be tracked accurately in 'real-time', using a 'Push' method for all Case Note movements
- 2.) Every effort must be made to retrieve and provide Patient Case Note media and volumes to any Requesting Location
- 3.) The physical creation or destruction of Patient Case Note media or volumes must be reflected within Millennium
- 4.) All Case Note media and volumes should have the corresponding barcode label affixed
- 5.) Every effort must be made to reduce the creation of 'Temporary Media'. When encountered, all information contained within a 'Temporary Media' should be merged and filed correctly into a Main media if present.
- 6.) Wherever applicable, the Request Queue must be monitored regularly and acted upon with the Request Status being updated accurately
- 7.) Ensure that you have identified the correct patient & correct case note folder before proceeding.
- 8.) Any confidential waste should be disposed of securely using confidential waste.
- 9.) Ownership and responsibility for new notes – if you create it, you are responsible for it.