Royal United Hospital Bath NHS
NHS Trust

Mini Manual

Casenote Tracking

1. **Single Case Note Tracking**
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3. **Track Case Notes to Community Hospital**
4. **Track Case Notes to External Location**
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HIM Tracking

Support available:

Please contact your local Champion User

Service Desk:

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RUH **CERNER**

BT
Bringing it all together

Single Case Note Tracking

1 SINGLE CASE NOTE TRACKING

The case note label shows both the patient MRN and the case note ID number. The MRN is always the same whereas the tracking ID number is different on each case note volume.

Tracking ID · MRN · 1147777

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

Result: **Scanning the ID:** only this volume is listed in the right hand pane and it is highlighted in the left pane

> **Find Patient:** all volumes will be listed in right & left pane. Be careful to select the correct volume to track.

Step 3. Select the **volume** you wish to change the tracking location for.

Step 4. Click the **Update Location for Selected Record** icon

OR **right-click** the volume, select **Quick Update Selected Records**

Step 5. **Location view:** select the location you wish to track to

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Batch Tracking

Step 6. Click **OK**

Result: The tracking location is updated

2 BATCH TRACKING

Step 1. Click the **Record Location Batch Update** icon

Step 2. Select the **facility**

Step 3. Select **tracking location**

Step 4. **Scan** case note barcode

Scanning the barcode will ensure that you are only scanning the case note volume you have.

> **Caution**: Using the **scanner** is the safest and the quickest way of entering the case note ID. If you have to type the number, ensure you are typing the **Tracking ID** and not the MRN.

Step 5. Repeat Step 4 for each case note you want to track to this location

> **Caution**: Ensure you are tracking the correct notes. You cannot delete a tracking once saved. To remove a patient from the list, highlight it in the left-hand pane and click the **Remove** icon

Step 6. Click the '**Save**' icon to track the notes onto the specified location

Result: The tracking location of each case note is updated to the specified location

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Track Case Notes Offsite

3 TRACK CASE NOTESTO COMMUNITY HOSPITAL

Step 1. Select the *volume* to track

Step 2. Click the *Update Location for Selected Records* icon

OR *right-click* the volume, select *Quick Update Selected Records*

Step 3. **Location view:** click *Community Hospital*

Step 4. Unfortunately only outpatient depts. are listed. Select the *hospital* and relevant *specialty*

Step 5. Click *OK*

Step 6. Click the **Note** icon

Step 7. Add a note with *date, volume, specific location, your name* as in the example:

Contents

11/11/11 - Vol 1 & Vol 2 Main Notes sent to Frome Main Ward- Alex Mee

Step 8. Click the *Save* icon

Step 9. Click the *Exit* icon

Result: The **Note** icon is displayed in the yellow banner. Staff can click the icon to read the note.

4 TRACK CASE NOTES TO EXTERNAL LOCATION

Caution: when tracking offsite (eg. to Frenchay or GWH etc) the Location View **does not specify which hospital**. It is therefore essential that you **add a Note** with the **hospital name, ward** etc.

View Tracking History

Step 1. **Location View**: click *External Location*

Step 2. Click *External Hospital* or *External Location*

Step 3. Click *OK*

Step 4. Click the *Note* icon and add the note.

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.