Royal United Hospital Bath NHS
NHS Trust

Mini Manual

Medical Records Pull List & TCI List

Explorer Menu   Appointment Book   PMOffice

Support available:

Please contact your local Champion User

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RUH   CERNER   BT Bringing it all together

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Create A Pull-list

1 CREATE A PULL LIST

These lists are pulled from the Request Queue and provide us with the information we need to locate the notes (e.g. MRN, Patient Name, Tracking Location, Request Number)

Step 1. Open Explorer Menu

Step 2. Select 'Medical Records'

Step 3. Select 'Medical Records Pull-list'

Step 4. Apply relevant search criteria

Mandatory fields are:

1. Output (should default to '*MINE*')	2. Facility Requesting Location (always *Royal United Hospital*)
3. Building Requesting Location	4. Requesting Location Type
5. Requesting Location	6. Required Date From/To

Step 5. Click '*Execute*' Execute

Result: The pull-list preview opens. Click '***Print'*** icon to print.

Caution: Ensure you are specifying a **Required** date range and not a **Request** date – otherwise you will not produce an accurate pull-list. These are very close to each other.

TIP: The request number for each patient is printed on the pull-list. This corresponds to the Request Queue, and is helpful if you need to locate an individual request (e.g. you need to reject just the request for one patient)

Create A TCI List

2 CREATE A TCI LIST

A TCI List is like a pull-list, but we use this to show a list of patients coming onto a ward for a procedure.

Step 1. Open Explorer Menu

Step 2. Select 'Medical Records'

Step 3. Select 'Printable TCI list'

Step 4. Apply relevant search criteria

Mandatory fields are:

1. Trust (Always Royal United Hospital)	2. Facility (Always Royal United Hospital)
3. Nurse Unit (Optional, but allows you to specify which ward if required)	4. TCI From/To date-range

Step 5. Click '***Execute'*** Execute

Result: The pull-list preview opens. Click Print icon to print

Caution: When pulling notes for clinic, always ensure that you keep updating your Pull-List or TCI list to make sure you capture any extra patients added.

If the additions are last minute, pull the notes and then use the request number for the extra patient to complete the request on the Request Queue (see *Med Recs Mini-Manual Vol 2*) before tracking the case notes to the clinic (for help with tracking, see *Med Recs Mini-Manual Vol 1*)

Author: IT Training Dept

Patient Locate & Appointment Enquiry

3 LOCATE INPATIENTS

Within PMOffice;

Step 1. Click the ‘Run Patient Locator’ icon

Step 2. Type in the patient name (in the format Surname, Firstname)

Step 3. Press **ENTER**

Result: The main window will display any matching patients

4 LOOK UP PATIENT APPTS

Within Appointment Book;

Step 1. Click the ‘Appointment Enquiry’ icon

Step 2. Select the ‘Person’ tab

From the **Enquiry** drop down menu:

Step 3. Select ‘Pathway Appointment Enquiry

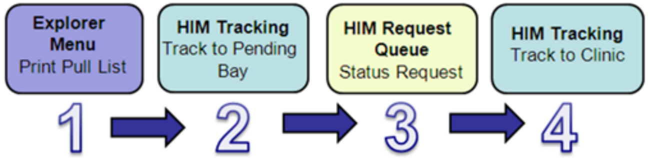
Step 4. Search for your patient

Step 5. Select a date-range

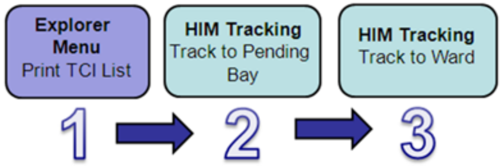
Note: The system will store all previous and upcoming appointments. Setting a date range is useful as it allows you to narrow this down.

Workflow Reminders

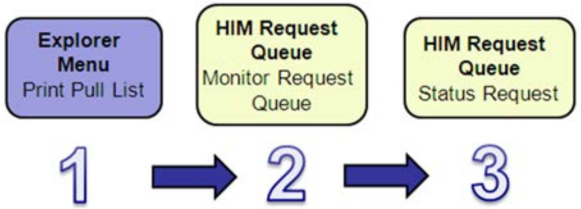
Outpatient Case Note Request HIM003



TCI Case Note Request HIM003



Ad-hoc Case Note Request HIM001



More details and further workflows can be located on the staff intranet.

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**