



Mini Manual

Patient Locate and Casenotes (Part 2 of 4)

1. HIR Request Notes
2. Business Rules

Support available:

Please contact your local Champion User

Service Desk:

Tel: 01225 82 5444

Email: ruh-tr.ITServiceDesk@nhs.net

RUH



Bringing it all together

Requesting Notes

1 HIR Request Notes



Within **Information Request** complete the necessary fields.


Note: The **Date required** and **Time required** fields always default to today's date and the time of the request. If request is for a different point in time, modify the fields as appropriate.

Within the **Facilities** field:

Step 1. Select Royal United Hospital.

Within the **Requester** field:

Step 2. If you are requesting a note for a clinician, type in the surname of the clinician for whom the notes are being requested.

Step 3. Click the **Binoculars**  icon to search for and select the requesting clinician.

Result: The **Requester** field is populated with the clinician's full name.

Within the **Patient Name** field:

Step 4. Click the **Find Patient**  icon.

The **Patient Search** dialog opens.

Step 5. Enter the Patient's details.

Step 6. Click Search.


A list of matching patients is displayed in the right-hand pane.

Step 7. Select the correct patient.

Step 8. Click All Encounters.

The Patient's media and associated encounters are displayed.

Requesting Notes

Note: If the incorrect Patient is selected, click the **Remove Patient**  icon to clear the patient's details.

Step 9. Click the Requesting Location icon.

The **Locations View** dialog box opens.

Step 10. Select the appropriate **Location View**.

Note: Locations held under the selected view appear in the lower pane.

Step 11. Select the appropriate **Location**.

Note: The location selected will be the location to which the notes will be tracked.

Note: If you regularly search within the same location, you can check the **Set as Default View** check-box to have the location field automatically infilled with this information.

Step 12. Click **OK**.

Result: The location is added to the **Requesting location** field.

Step 13. Set the Request status to Initial.

Step 14. Select an appropriate reason for requesting the case notes, by selecting an option (for example, **Routine Administration**) from the **Request Type** drop-down list.

Note: When all the casenote request details are complete, ensure that all main volumes are requested, together with any temporary and other relevant media. It is the responsibility of the user to select all required media when making a request.

Note: To retain non-patient-specific information for the next search (such as the requesting location and request type), tick the **Maintain Request Information** box.

Step 15. To select and unselect double click on media/volume.

Requesting Notes

Blue tick in check box = Selected.

Blank check box = Unselected.

Note: For Administration requests only – If multiple volumes for an individual patient are recorded as being at more than one location then a separate request should be made for each volume.

Step 16. Click Send Request.

Note: If a patient has existing requests, the **Patient in Request** dialog will open, listing the patient's request numbers. If a request exists for the same patient, requester and location then a **Duplicate Request** dialog box will open. Click **No** to cancel the request or **Yes** to place the duplicate.

The **Note View Form** window opens.

Note: You can either enter additional notes relevant to the request, or exit if none are required.


The cursor moves to the **Contents** pane.

Step 17. Enter the note required in the contents pane.

Step 18. Click the **Save new note**  icon.

Result: The date and time that the note was saved is displayed in the **Request** pane.

Note: The note appears within the **Request Queue** for the specific request only. If the **Permanent note** is selected it can still be deleted, but you will be prompted should you try to delete it. The **Permanent note** check box should be selected before saving.

Step 19. Click the Exit  icon.

Note: You may wish to make a note of the request number.

Result: The request has been sent. It will now remain in the Request Queue until it has been Completed/Cancelled/Rejected.

Business Rules

Business Rules

1. Ensure that you have identified the correct patient before proceeding to add anything to their record. (Check spellings of names, Dates of Birth, Post codes, addresses, MRNs, ordering of first/surnames, patient aliases, spellings, etc.)
2. If in doubt, ask the patient to confirm their details, name spelling, etc. before continuing
3. Ensure that you have identified the correct patient before proceeding to add anything to their record. (Check spellings of names, Dates of Birth, Post codes, addresses, MRNs, ordering of first/surnames, patient aliases, spellings, etc.)
4. Any confidential waste generated (EG: Faxes, printed e-mails, printed data from the clinical systems, etc) should be disposed of securely using confidential waste.