



Mini Manual

Radiography Staff

Casenotes

1. View Casenotes Location & History
2. Track Single Casenotes
3. Batch Track Casenotes
4. Request Casenotes
5. Close Applications
6. Business Rules

Support available:

Please contact your local Champion User

Service Desk:

Tel: 01225 82 5444

Email: ruh-tr.ITServiceDesk@nhs.net




View Location & Track Notes

1. View Location and History

Step 1. Login to Cerner Millennium and **HIM Tracking**

Step 2. Scan the **Tracking ID** into the **Tracking ID** field at top right of the screen

Or click **Find Patient**  icon on the toolbar. Enter MRN or other criteria. Search, click on patient, OK.

Result: A list of the patient's media, volumes and encounters is displayed.

Current Location: this is recorded in the right pane

Step 3. **Double click the Main media folder** in the right pane to display the history. The most recent location is at the top.

Step 4. **Double click on a location** to condense the folder again.

2. Track Single Casenotes

Step 1. Login to **HIM Tracking** and open the **patient record** as above.

Step 2. **Right-click the volume** in the right pane that you wish to track.

Step 3. Click '**Update Location for Selected Records**'

Step 4. Click the **Location View** arrow and select the location you wish to track the notes to.

Note: If you regularly search within the same location, you can check the **Set as Default View** checkbox to have that location appear at the top of any future lists of location search results.

Step 5. Click **OK**

Result: The current location has been updated.

Batch Track Casenotes

3. Batch Track Casenotes

Step 1. Login to **HIM Tracking**

Step 2. From the toolbar click the **Record Location**

Batch Update icon



Step 3. On the **Side Bar** select the **Facility**


Step 4. Click the drop down arrow and select the **Tracking Records Location** (where you want to track the notes to)

Step 5. Click within **Tracking ID** box (in the top right of the window)

Step 6. **Scan the first barcode** (or type it manually) into the **Tracking ID** box. Press the **Enter** key.

Step 7. Repeat with each barcode.

Note: If case note has no barcode, see label printing procedure on separate mini guide.

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 8. When all the record numbers have been entered click the **Save** icon.

Step 9. **Exit** the Batch Record Location Update Mode by clicking the **Record Location Batch Update** icon.

Request Casenotes

4. Request Casenotes

Step 1. Login to Information Request

Note: The **Date Required** and **Time Required** fields always default to **Today's** date and **Now**. If the request is for a different day or time, modify the fields.

The yellow fields on the right are mandatory.

Step 2. Facilities: click the drop down arrow and select **Royal United Hospital**

Step 3. Requester: Click the **Binoculars** and find the requestor's name

Step 4. Patient Name: Click the **Find Patient icon** and search for the patient. Select the correct patient. Click **All Encounters**.

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

Step 5. Requesting Location: Click the icon on the right of the field

Step 6. Click the **drop down arrow** to open the list.

Step 7. Click **Departments**

Step 8. Select the **Location** from the list (e.g. X-Ray)

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

Step 9. Click **OK**.

Step 10. Request status: set this to **Initial**.

Step 11. Request Type: Select the reason for requesting the casenotes

Close Applications

Caution: 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.

Step 12. Click **Send Request**

Step 13. Type a note if required and Click the **Save New Note icon**



Step 14. Click the **Exit icon**

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

5. Close Applications

Step 15. To close each application click the **Exit icon** on the toolbar

Or the **Task Menu, Exit**.

If you use the corner cross to close the application your settings will be lost.

Caution: To exit Click the Exit  **Exit** Icon.

Or Task, Exit

Business Rules

Business Rules

1. Searching for patients using the PDS must be performed thoroughly and carefully.
 - a. The first "simple" trace should be skipped by selecting next; this will take you to the "advanced" trace.
 - b. The only two mandatory fields in advance trace are surname and gender.
 - c. The patient should be searched for using the minimum amount of information. The more information you enter to search by, the more the search is restricted and this may result in not finding your patient - less can sometimes be more.
 - d. If any of the information entered to the search differs from that held on the PDS, you will not find your patient.
 - e. You can use wildcards - type at least the first 2 letters of the surname and/or first name then an *.
 - f. If your patient has been seen by this Trust before, or is registered with a GP in England or has had treatment in another hospital in England, you can reasonably assume that you will find the patient.
 - g. If you don't find your patient the first time, search again.
2. Every effort must be made to find and retrieve the correct patient from the PDS before a request is made to "add patient without encounter".
3. Changes to demographics, priority or referral details must be reflected in Millennium.
4. When a referral from a dentist is received, where possible the dentist should be searched and selected in the "GDP details" field. If the referring dentist can not be found in this list, the dentists name and address should be typed in the free text "Comments" box toward the bottom of the page. For such referrals the "source of referral" should be selected as "dentist referral".
5. Time should be taken to ensure that any information entered is accurate.
6. If ethnic category is unknown and the patient is not available to ask, enter "other - not known". This information can then be updated the next time the patient visits the hospital, e.g. at outpatient clinic or on admission. The option of "patient declined" will only be used when the patient refuses to provide this