Royal United Hospital Bath NHS
NHS Trust

Mini Manual

Medical Secretaries

1. **Request Consultant Opinion (Pink Slips)**
2. **View and Amend a Patient's Details**
3. **Locate an Inpatient**
4. **Order a Follow-Up Appointment**
5. **Update an RTT and Discharge a Patient**

Support available:

Please contact your local Champion User

Service Desk:

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Request Consultant Opinion (Pink Slips)

1 Request Consultant Opinion (Pink Slips)

Launch **Powerchart**

Step 1. **Message Centre** opens.

Step 2. Select the **Pools** tab from the **Side Bar** menu.

Step 3. Select **Consults** from the **Side Bar** menu, under **Work Items.**

Note: Once the communication has been opened it cannot be marked as unread. The person opening the message must then take full ownership of it.

Step 4. Double click on the communication in order to open it.

Step 5. Click **Print** icon.

Step 6. Click icon, or you may need to redirect the message, in which case click the icon.

Step 7. Check the relevant **Action**.

Note: If more information has to be added use the free text box.

Step 8. Check the **Complete** box.

Step 9. Click the **Send** button.

View and Amend a Patient's Details
Locate an Inpatient

2 View and Amend a Patient's Details

To View a Patient's Details:

Launch **PM Office**

Step 1. Select **Conversation** from the **Side Bar** menu.

Step 2. Double click **View Person**.

Step 3. Search for patient and click **OK.**

Step 4. Select the Facility.

To Amend a Patient's Details:

Step 5. Select **Conversation** from the **Side Bar** menu.

Step 6. Double click **Person Correction Manager** from the **Side Bar** menu.

Step 7. Click **Next**

Step 8. Complete the mandatory fields .

Step 9. Highlight the relevant patient.

Step 10. Select the Facility.

Step 11. Make the necessary amendments.

Step 12. Change the **Beginning Effective Date** to today's date

3 Locate an Inpatient:

Step 1. Launch **PMLocator** icon.

Step 2. Search for Patient

All the Patients matching the search will be displayed in the lower pane, showing their location.

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Order a Follow-Up Appointment

4 Order a Follow-Up Appointment

Launch **Appointment Book**

Step 1. Select **Appointment Enquiry** icon**.**

Step 2. From the **Side Bar** menu select **Location.**

Step 3. Select **Clinic Patients Missing Follow-Ups.**

Step 4. Select **Ambulatory.**

Step 5. Select the **Location**.

Step 6. Select the **Start Date** and **End Date.**

Step 7. Click **Find** .

Step 8. Highlight the Patient's name and **Launch Powerchart** using the icon.

Step 9. Select **Requests** from the Side Bar menu.

Step 10. Click **Add** (under the **Requests** title)

Step 11. Select **Contains** from the drop-down list.

Step 12. Type **F/Up** in the **Search**. field and the **Binoculars** icon.

Step 13. Click the appropriate **Follow-Up.**

Step 14. Complete **mandatory fields.**

Step 15. When all details complete click **Sign**

The value in the **Status** column changes to Processing.

Step 16. Click **Refresh** .

The value in the **Status** column changes to **Ordered.**

Update an RTT and Discharge a Patient

5 Update an RTT and Discharge a Patient

Open the **Appointment Book.**

Step 1. Click the **Appointment Enquiry** (eye) icon**.**

Step 2. From the **Side Bar** menu scroll select **Location.**

Step 3. Select **Clinic Patients Missing Follow-Ups** list.

Step 4. Select **Ambulatory.**

Step 5. Select the **Location**.

Step 6. Select the **Start Date** and **End Date.**

Step 7. Click **Find**.

Step 8. Highlight the Patient's name and click **Launch Powerchart** .

Step 9. Select **AdHoc.**

Step 10. Select **Referral to Treatment** in the Daily Tasks folder

Step 11. Click **Record.**

Step 12. Complete **mandatory fields**, and add any comments if necessary**.**

Step 13. Click **Sign Form** icon.

Step 14. Close PowerChart.

Step 15. Return to the **Clinic Patients Missing Follow-Ups** list

Step 16. Select the patient's appointment, right click and select **Modify**

Step 17. Select **Discharged from consultant's care** in the **Outcome of Attendance** field

Step 18. Click **OK**

Business Rules

Business Rules

1. Searching for patients using the Personal Demographics Services (PDS) must be performed thoroughly and carefully. Minimum search criteria being: forename, surname, date of birth and gender.
2. Changes to demographics, priority or referral details must be reflected in Millennium.
3. Patients not receiving any future appointments must be discharged.
4. Following results clinicians must inform the secretary if a further appointment is required. If so the order needs to be placed. If no appointment is required the RTT status updated in PowerChart and the patient is discharged in Millennium .
5. Consult requests should always be responded to either by confirmed as actioned, returned to requestor or re-directed to a more appropriate Department.
6. Specialty pool inboxes must be checked at least daily for new requests by designated individual (allocated via specialty manager).
7. Once opened, that member of staff will need to take responsibility for ensuring the request is actioned appropriately (i.e. consultation is arranged or request is declined).