Royal United Hospital Bath NHS Trust

# Mini Manual

# Patient Locate and Casenote Tracking

# (Part 1 of 4)




Support available:

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RUH

CERNER

BT Bringing it all together

## Patient Locate / Tracking Notes

### 1 Patient Locate

**Step 1.** Launch PM Office

**Step 2.** Click the Run Patient Locator icon

The Patient Mgmt. Patient Locator window opens

**Step 3.** Enter the name of the patient into the **Name** field and press **Enter**

Details of all patients that match the name entered are displayed

**Result:** The patient has been located



## Tracking Notes

### 2 Tracking Casenotes

Within **HIM Tracking** HIM Tracking **:**

**Step 1.** Click the **Find Patient** icon**.**

The **Patient Search** dialog box opens.

**Step 2.** Enter the details of the patient into the search fields.

**Step 3.** Click the **Search** button.

**Step 4.** Select the correct patient.

**Step 5.** Click **OK.**

**Result:** A list of the patient's media, volumes and encounters is displayed in the **Profile: Tracking** window.

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**Note:** Users can also enter or scan the tracking ID into the **Tracking ID** field to find the patient. Barcodes will be present for use with scanners.

**Note:** Although only scanning one media, all media and volumes for the Patient will populate in the same way as if you were to search.

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**Step 6.** Highlight the media type and volume you wish to track.

On the toolbar:

**Step 7.** Click the Update Locations for Selected Records icon.

**Result:** The **Update a Records Location** window is displayed.

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**Note:** Check the top pane of the box for any information concerning the media/volume selected.

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**Step 8.** Select the appropriate location view from the **Location view** drop-down list.

**Step 9.** Select the appropriate location option.

# View Note Location

**Note:** If you regularly track to the same location, you can check the **Set as Default View** check-box to have that location appear when the window is next opened.

**Step 10.** Click on the **OK** button.

**Result:** The case note will be tracked to the location selected.

## 3 View Note's Location

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

**Step 2.** Within HIM Tracking click the **Find Patient**  icon **on the toolbar.**

**Note:** Alternatively, users can enter or scan the **tracking ID** into the **Tracking ID** field to find the patient.

**Result:** The **Patient Search** dialog box opens.

**Step 3.** Type details. Click **Search**.

**Step 4.** Carefully check the details and select the patient from the list.

**Step 5.** Click OK

**Result:** A list of the patient's media, volumes and encounters is displayed in the **Profile: Tracking** window.

**Current Location**: this is recorded in the right pane



# View Note History

## 4 View Note's Movement History

**Step 1.** Double click the Main media folder in the right pane to display the history. The most recent location is at the top.

**Step 2.** Double click on a location to condense the folder again.



# 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.