Royal United Hospital Bath NHS Trust

Mini Manual

View Patient Details

(Part 1 of 1)

Support available:

Please contact your local Champion User

Service Desk:

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Patient Locate / View Pt Details

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

2 View Patient's Details

Step 1. Within PM Office select Conversation from the Side Bar menu.

Step 2. Select **View Person**, which opens the **Patient Search** dialog box**.**

Step 3. **Patient Search:** Search on one or more criteria.

Step 4. In the **Name** box type the Patients name in the following format '**Surname, Forename**'

Or type the **MRN**

Step 5. Select the **Gender**

Step 6. Click **OK**

Step 7. **Select** the patient. Click **OK**.

Step 8. Type the initial letter (**r**) into the **Facility Name** box.

Step 9. Press **Enter** key

View Encounter

Step 10. Select Royal United Hospital

Step 11. Click **OK**

Result: The **View Person** screen opens.

View Person: This is a read only screen. In the lower part of the screen are four tabs:

Address, Next of Kin, Emergency Contact, Parent / Guardian

Step 12. Click on the tab and read the data you require.

Step 13. Then click OK.

3 View encounter details using PM Office

Step 1. In **PM Office,** if it is not already open, click on the **Conversation** button to display the conversation list.

Step 2. In the **Conversation** list, double click on **View Encounter**.

Step 3. Enter the patient's name in the order **Surname, Firstname** and any additional information that you are aware of in order to narrow down your search, as shown in the next image.

Step 4. Click on the **Search** button. A list of patients matching your search will be shown.

Note: There are two ways in which an encounter can be viewed; by Previewing the encounter to give a very brief overview of its contents, or by viewing the full encounter information.

Appointment Enquiry

To Preview the encounter information:

Step 5. Click on the encounter that you want to view in the bottom pane of the window.

Step 6. Click on the **Preview** button. The next image shows the screen that appears.

Step 7. Click on the **Encounter** tab.

Note: Each folder within the tab can be expanded by clicking on the small "+" to the left of it to show a preview of the encounter's details, as demonstrated in the next image. They may also be collapsed ("shrunk") again by clicking on the small "-" sign next to the expanded folder.

Result: The patient's encounter details are previewed in view only mode. Click the **Close** button to exit the preview and then **Cancel** to cancel the search screen if desired.

4 Appointment Enquiry

Step 1. Open the Appointment Book. 

Step 2. Find the patient's appointment by clicking on the **Appointment Enquiry (eye)** icon. 

Step 3. Click on the **Person** tab.

Step 4. Click on the downward arrow by the **Enquiry** field choose the **Pathway Appointment Enquiry** list.

Step 5. Type in the patient's surname and click on the ellipsis button . Select the patient from the patient search window and click **OK**.

Step 6. Ensure the required **Start Date** and **End Date** is entered. You can type T from the keyboard to enter today's date or use the up and down arrows to select the date.

Step 7. Click the **Find** button.

Appointment Enquiry

Note: The Pathway Appointment Enquiry list shows the appointment details and scheduling resource.

Result: A list of the patient's with their appointment type, date and the clinician they have seen will be displayed.

Business Rules

Business Rules

- 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.)
- If in doubt, ask the patient to confirm their details, name spelling, etc. before continuing
- Smartcards are your electronic signature.
- DO NOT share your cards.
- If your card is lost/stolen, report this immediately to the RA Agent in IT.
- DO NOT share your PIN codes ("Passwords"), or write them down.
- Remember that the Cerner Millennium system audits all activities undertaken on it. This log can be accessed and reviewed by IT.
- Always remove your Smartcard and lock your computer screen (Using CTRL + ALT + Del, then "Lock Computer") when away from the PC.
- Any confidential waste generated (EG: Faxes, printed e-mails, printed data from the clinical systems, etc) should be disposed of securely using confidential waste.