



Case Note Tracking

HIM Tracking

Support available through:

IT Service Desk for IT issues:

Tel: 01225 82 **5444**

Email: ruh-tr.ITServiceDesk@nhs.net

or

Millennium Trainers for Millennium “How to’s”:

Tel 01225 82 **4431**

Email: ruh-tr.IT-Training@nhs.net



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Key Business Rules

1. All Case Note media must be tracked accurately in 'real-time', using a 'Push' method for all Case Note movements.
2. Every effort must be made to retrieve and provide Patient Case Note media and volumes to any Requesting Location.
3. Any Temporary/Buf folder made **MUST** be created and tracked on Millennium especially if moving location. If not, critical information about a patient may be lost.
4. All Case Note media and volumes should have the corresponding barcode label affixed.
5. Every effort must be made to reduce the creation of 'Temporary Media'. When encountered, all information contained within a 'Temporary Media' should be merged and filed correctly into a Main media if present.
6. Wherever applicable, the Request Queue must be monitored regularly and acted upon with the Request Status being updated accurately.
7. Ensure that you have identified the correct patient & correct case note folder before proceeding.
8. Any confidential waste should be disposed of securely using confidential waste.
9. Ownership and responsibility for new notes – if you create it, you are responsible for it.
10. On ward discharge track notes to 'Clinical Coding in Transit'

Case Note Tracking

Note: Incorrect tracking of Case Notes has a direct impact on Patient Care.

MRN (Medical Records Number) = general patient identifier used for locating a patient.

Tracking ID (Barcode Number) = an identifier of a specific case note volume / media.

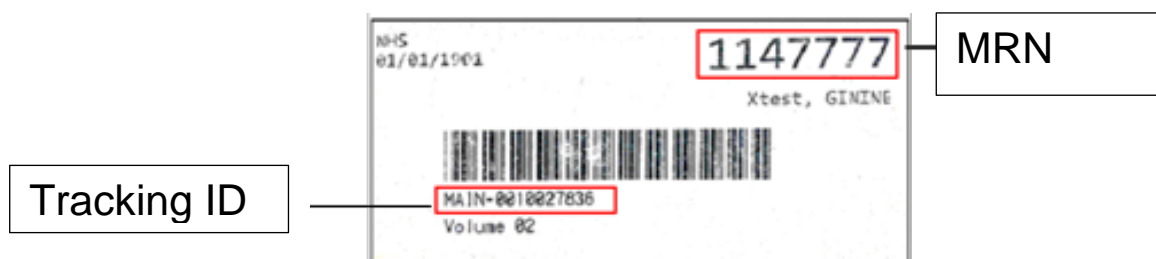
The case note label shows both the patient MRN and the case note ID number. The MRN is always the same whereas the tracking ID number is different on each case note volume.

When tracking the use of a **scanner** is strongly recommended as this will ensure the correct volume is displayed.

If necessary, **contact the IT department** for additional barcode scanners.

Case notes must be **tracked accurately** in 'real-time', using a 'Push' method for all case note movements.

Note: On Discharge track and send all case notes to the clinical coding department 'Clinical Coding in Transit'.



Why doesn't my Scanner work?

- Is it the right distance from the label? The scanner should be at least 3-4 inches away from the barcode. Ensure the red laser covers the length of the barcode.
- Try unplugging the scanner from your USB port and then plugging it back in to reboot it.
- Contact the IT Dept. for help or a possible replacement.

Single Case Note Tracking

Step 1. Single click to open **HIM Tracking** from the Millennium applications screen



Step 2. Open the patient record by **scanning** the barcode into the

Tracking ID field

OR Search for the patient manually by clicking the **Find**

Patient icon  and searching by **MRN** or other criteria.

Note: **Scanning the ID:** only this volume is listed in the right hand pane and it is highlighted in the left pane.

Find Patient: all volumes will be listed in right & left pane. Extra care needed to select the correct volume to track.

Check that the correct patient is identified in the yellow banner bar.

In the right pane are the record type (e.g. Main), the volume number, the present location and the movement date.

Step 3. **Right-click** the volume in the right pane and select **Quick Update: Selected Records' Location**

Step 4. In **Location view** select the location
e.g. Inpatient (for a ward) or Department (for clinical coding)

Step 5. From the list select the location and click the OK button

Result: The new location is displayed in the right pane with the movement date.

Alternatively, you can use the **Update Location for Selected Record** icon



from the top toolbar instead of the right click method.

View Movement History

Double click the volume in the left pane to open up movement history including the date and time and ID of person responsible for each move.

Tracking Case Notes to Community Hospitals

Notes are regularly sent to community hospitals by nursing staff.

Step 1. **Right-click** the volume in the right pane and select **Quick Update: Selected Records' Location**

Step 2. In Location View select **Community Hospital**

Step 3. Select the location and click OK

Tracking locations are set up for inpatients at Paulton and St Martins and outpatient clinics at other hospitals.

If a nurse wants to track a set of notes for an inpatient going to a community hospital other than Paulton or St. Martins then they would need to track to **External Location / External Hospital** and then add a sticky note to say which community hospital they are sending them to.

Add a Note

Step 1. Click the **Note** icon  on the top toolbar

Step 2. Add a note in the format of:

Date, volume you are tracking, specific location, your name

```
Contents
11/11/11 - Vol 1 & Vol 2 Main Notes sent to
Frome Main Ward- Alex Mee
```

Step 3. Click the **Save** icon 

Step 4. Click the **Exit** icon 

Result: The Note icon is displayed in the yellow banner. Staff can click the icon to read the note.

Batch Tracking

Batch tracking is used to track lots of case notes to the same location.

Step 1. Click **Record Location Batch Update** icon  from the top toolbar.

Step 2. By default the facility will be **Royal United Hospital**

Step 3. In **Location view** select the location
e.g. Inpatient (for a ward) or Department (for clinical coding)

Step 4. From the list select the location e.g. Clinical Coding in Transit


Step 5. Scan the barcode into the **Tracking ID** field


Tracking ID:


Caution: Using a **scanner** is the safest and the quickest way of entering the case note ID.

If you have to type the number, ensure you are typing the **Tracking ID** and not the MRN.

Step 6. Scan each case note that you want to track.

Caution: Ensure you are tracking the correct notes. You cannot delete a tracking once saved. To remove a case note from the list, highlight it in the left-hand pane and click **Remove** icon 

Step 7. Click the **Save**  icon from the top toolbar. The list disappears and the case notes have been tracked.

Step 8. Click **Record Location Batch Update** icon  from the top toolbar to close the Batch view.

Note: When batch tracking the Green Banner Bar should look like this:

Batch Record Location Update Mode

If it says 'Moving All Volumes' or 'Check-In Mode'

Batch Record Location Update: Moving All Volumes | Check-In Mode

It is because these icons have been selected (appear

indented) on the toolbar



. Just click on the indented icon to un-indent it and make sure the Green Banner Bar looks as it should. You can now continue as normal to only track the volumes that you have.

New Media Creation – Authorised users only

In Millennium, media (folders) can be created for different types of case note (e.g. Purple Temporary Folders, Emergency Temps, Matt Packs etc.). These need to be tracked independently from the main notes folder.

Note: Main folders can ONLY be created by Medical Records.

Temporary Media

Temporary media can be created on Millennium by authorised areas and users only. This allows folders or loose paperwork to travel about the Trust in a controlled manner. Uncreated or untracked material on Millennium introduces a direct risk to patient care and effects case note provision across the Trust.

If you are unable to create media yourself on Millennium contact Medical Records to create the media for you.

Every effort should be made to file paperwork relating to a patient within their Main Case Note.

Note: Creation of Temporary/Buf folders should be an exception.
Any Temporary/Buf folder made **MUST** be created and Tracked on Millennium especially if moving location. If not critical information about a Patient may be lost.
Creation of high numbers of Temporary/Buf folders impacts Case Note retrieval and therefore information availability for Patient Care and Coding.
If the patient already has a Temporary/Buf folder on Millennium it should be used.
Do not create multiple Temporary/Buf folders especially in the same location.

By creating and tracking these properly you are providing information to other staff within the Trust about the information that exists about a patient and where it is, should they need it.

Folder Types include:

- MAIN:** Main Folders, Created by Medical Records Dept.
- TEMPORARY:** Purple Folders, Created by Medical Records Dept.
- EMER TEMP:** Red/White/Buf folders, created by Wards for Emergency Admissions.
- ENT CAS:** Yellow Folders for ENT Casualty Clinic
- EYE CAS:** Green Folders for Eye Casualty Clinic
- EPAC/GEAC:** Pink Folders created by Gynaecology.

Note: If Main Notes have not arrived contact a Medical Records Assistant to find out the Case Note status.

In order to create a folder on Millennium you need the Medical Records Role. Call the EPR Millennium Team (x4420) if you feel you need this role added to your smartcard.

Please Track and Send ALL Case Notes to 'Coding in Transit' after Discharge.

Create New Temporary Media Type

Step 1. Open HIM Tracking.

Step 2. Open the patient record by **scanning** the barcode into the

Tracking ID field 

OR Search for the patient manually by clicking the **Find Patient** icon and searching by MRN or other criteria.

Step 3. **Right-click** the volume in the right pane and select **Create New Media**

Step 4. In **Location view** select the **location**

Step 5. Select the **media type**

Step 6. Select the **location** from the list

Step 7. Click **Create Volume**

Step 8. Check you have selected the **correct media and patient** before continuing.

Step 9. If correct click **Yes**.

Step 10. Select the Organization: **Royal United Hospital**

Step 11. The system confirms the creation of the media and gives you a Tracking ID for it.

Step 12. Click **OK**

Alternatively, you can use the **Create New Media** icon from the top toolbar



instead of the right click method.

Result: There is a new media type created that can be tracked independently of any other media within the patient record.


Print Barcode Labels

In Millennium, all case notes are tracked by scanning the barcode label on the folder. Each case note folder has a unique barcode and tracking ID

Barcodes can only be printed by areas which have a dedicated barcode printer.

- Step 1.** Right-click on the **volume/media** you wish to print labels for
- Step 2.** Select **Print Labels**
- Step 3.** Select **Selected Records**

If you need to track a case note which does not have a barcode, click the


Find Patient icon,  search for the patient, and select the relevant case note folder and track to the new location.

Purge Media

If you have physically merged temporary notes back into a main volume of case notes, the temporary media will also need purging in HIM Tracking so that it cannot be tracked by mistake.

In order to purge a folder on Millennium you need the Medical Records Role. Call the EPR Millennium Team (x4420) if you feel you need this role added to your smartcard.

Step 1. Right-click on the temporary media and select **Purge Volume**

Or click the **Purge Volume** icon  on the top toolbar.

Step 2. Select the temporary media and click **Purge**

Note: The system will only allow you to purge media without an associated encounter.

If your card access does not allow you to purge the media in HIM Tracking:

Step 1. Track the **Main Volume** as usual to the correct location

Step 2. Track the **Temporary Media** to **Medical Records, To Be Purged**

Result: Medical Records will purge any media tracked to this location.

Case Note Requests

Automatic requests for Case Notes

Millennium generates an automatic request for case notes on admission and when outpatient appointments are scheduled.

Request Case Notes

Medical Records pull request lists from Explorer Menu on a specified date for all Secretaries.

Step 1. Single click to open **Information Request**



Step 2. On the left the **Date & Time Required** by default will be today and now. Change this as appropriate.

Date required:	22/09/2015	▲▼
Time required:	1028	▲▼

Step 3. Complete all the fields on the right including the following:

Step 4. Facilities: Royal United Hospital

Step 5. Requester: click the binoculars and search for the Medical Secretary (yourself).

Note: Medical Records pull the request list for Secretaries. It is **essential** that the requester identifies the Secretaries name.

Step 6. Patient Name: click the find patient button and search for the patient. Click **All Encounters**, then **OK**
The patient's case note volumes are now displayed.

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



Step 7. **Requesting Location:** click the location icon

Step 8. Select **Secretaries**

Step 9. From the list select the relevant consultant / department

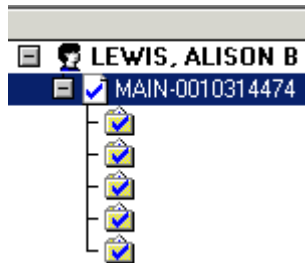
Note: You can set the location as the **Default View**



Step 10. **Request Status:** by default should be Initial

Step 11. **Request Type:** select Routine Administration

Step 12. Always request all Main volumes. The request will apply to all the volumes that are ticked.



Step 13. Click **Send Request**


Note: If a patient has existing requests, the **Patient in Request** message will be shown.

If the previous request is the same as yours a **Duplicate Request** message will be shown.

To avoid placing duplicate requests click **No** to cancel the request.

Step 14. The **Note View Form** appears. Write in the comments box if required.

Step 15. Click the **Save New note** icon. 

Step 16. Click the **Exit** icon 
The request has now been placed.

View Your Requests

You can view the requests that you have placed:

Step 1. **Requester:** click the binoculars and search for the Medical Secretary (yourself).

Step 2. Click **Enquire on Requester**

Step 3. This will open the **Request Queue** showing all the requests placed by the Requester including the location, date requested and date required.