

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. All Case Note media and volumes should have the corresponding barcode label affixed.
4. Ensure that you have identified the correct patient & correct case note folder before proceeding.
5. Any patient identifiable data should be disposed of securely using confidential waste.
6. 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.

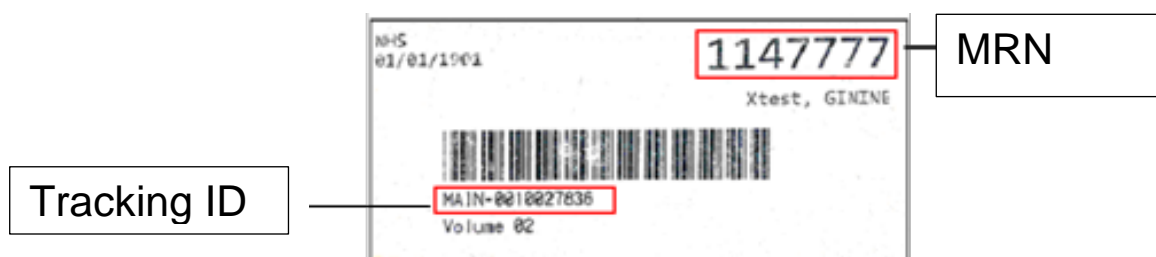
The case note label shows both the patient MRN and the case note ID number. The MRN is always the same whereas the tracking ID number is different on each case note volume.

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?

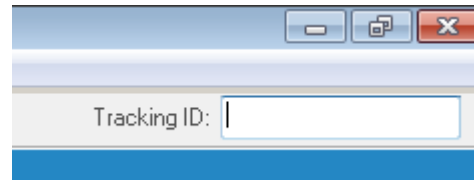
- Is it the right distance from the label? The scanner should be at least 3-4 inches away from the barcode. Ensure the red laser covers the length of the barcode.
- Try unplugging the scanner from your USB port and then plugging it back in to reboot it.
- Contact the IT Dept. for help or a possible replacement.

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

Step 3. OR Search for the patient manually by clicking the **Find**

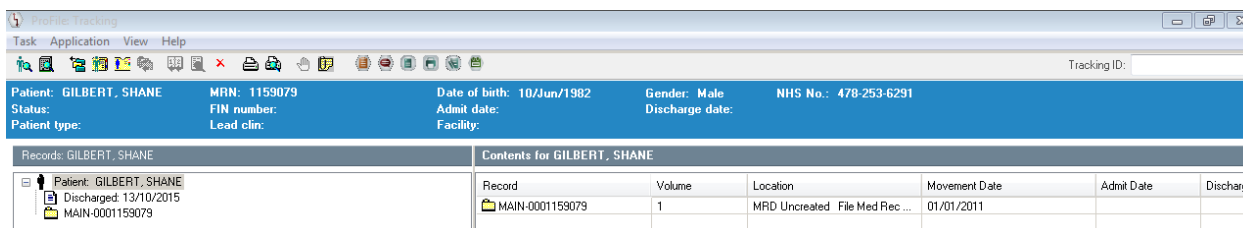
Patient icon  and searching by **MRN** or other criteria.

Note: **Scanning the Barcode:** 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 is 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.

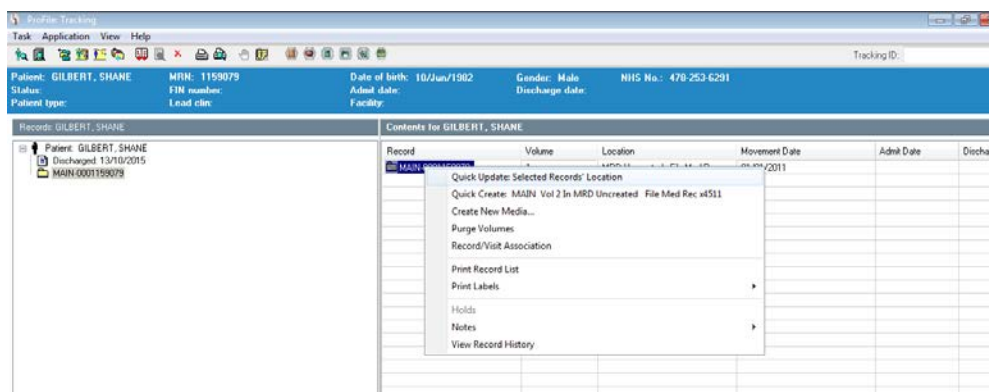


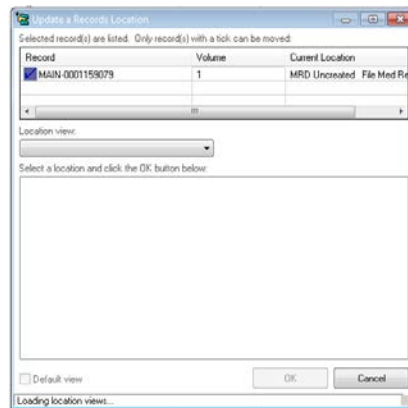
Step 4. Right-click the volume in the right pane and select Quick Update: Selected Records' Location

Alternatively, you can use the **Update Location for**

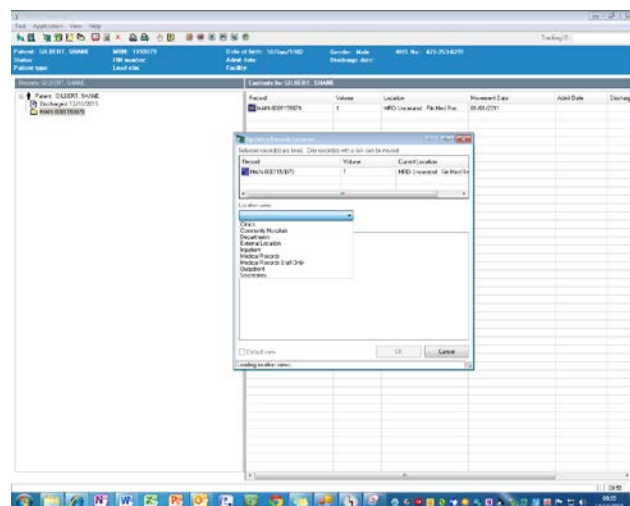
Selected Record icon  from the top toolbar instead of the right click method.

Step 5.

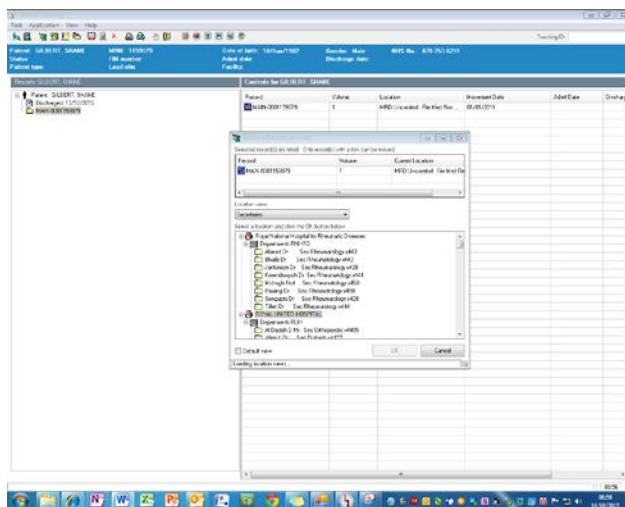




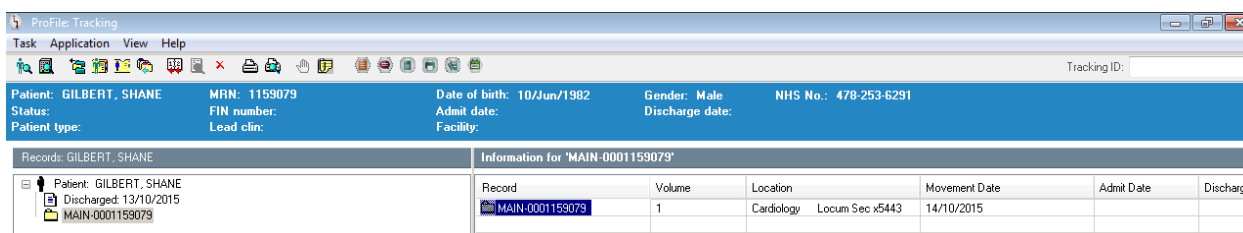
Step 6. In **Location view** select the location e.g. Inpatient (for a ward) or Department (for clinical coding)



Step 7. From the list select the location and click the OK button



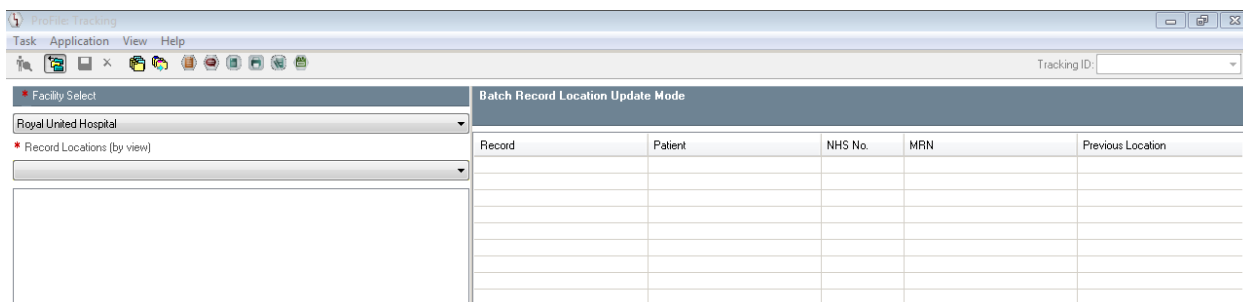
Result: The new location is displayed in the right pane with the movement date.



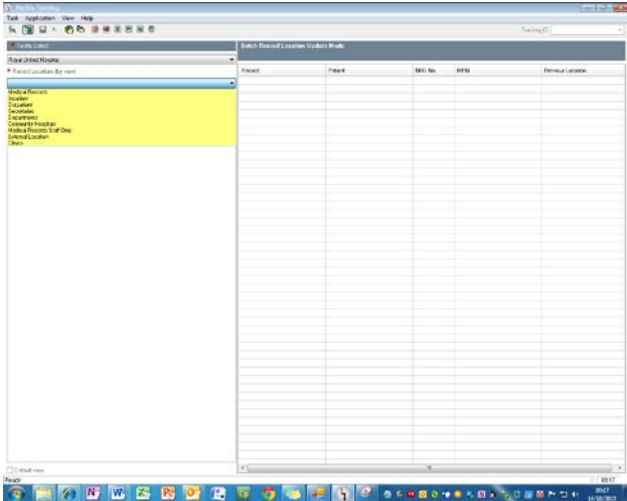
Batch Tracking

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

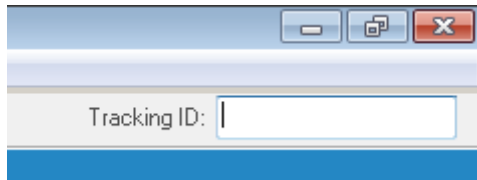
Step 1. Click **Record Location Batch Update** icon  from the top toolbar.

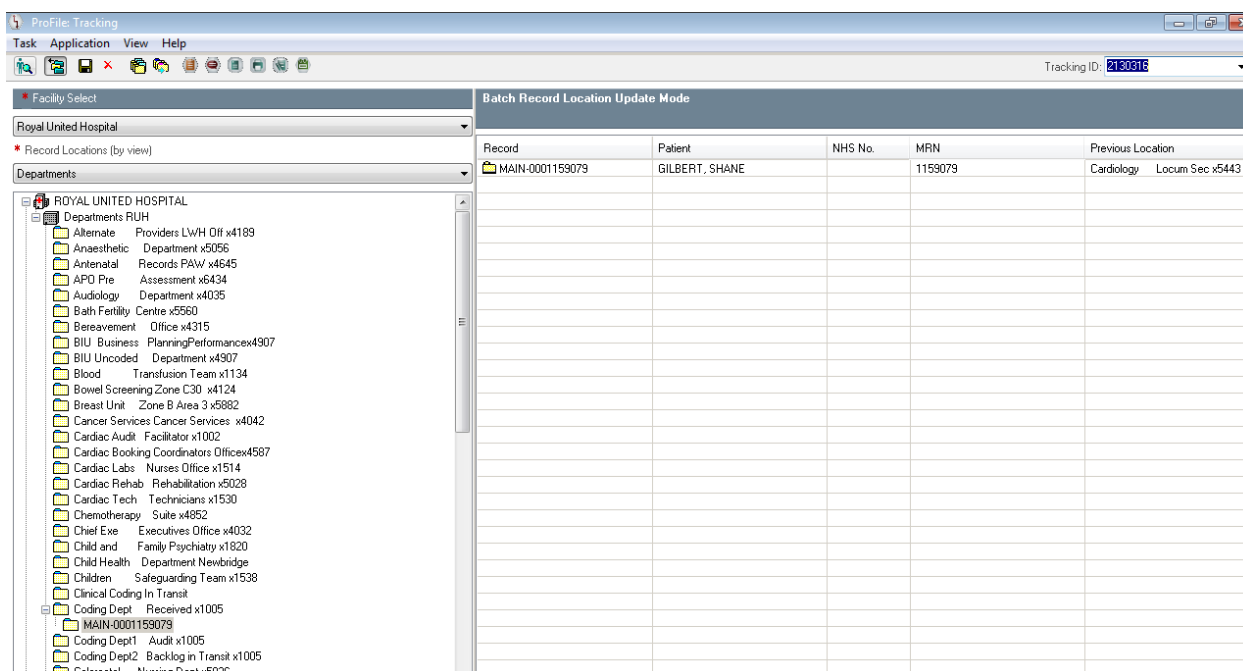


- Step 2.** By default the facility will be **Royal United Hospital**
- Step 3.** In Record Locations (by view) select the location e.g. Inpatient (for a ward) or Department (for clinical coding)



- Step 4.** From the list select the location e.g. Clinical Coding in Transit
- Step 5.** Scan the barcode into the **Tracking ID** field







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.

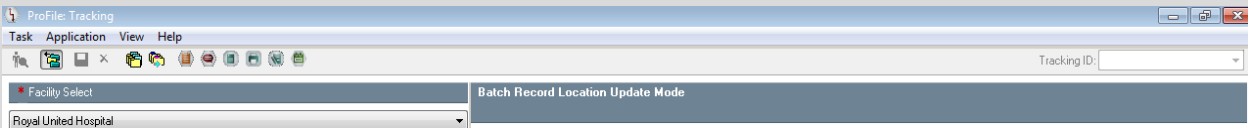
Caution: Ensure you are tracking the correct notes. You cannot delete a tracking once saved. To remove a case note from the list, highlight it in the left-hand pane and click

Remove icon 

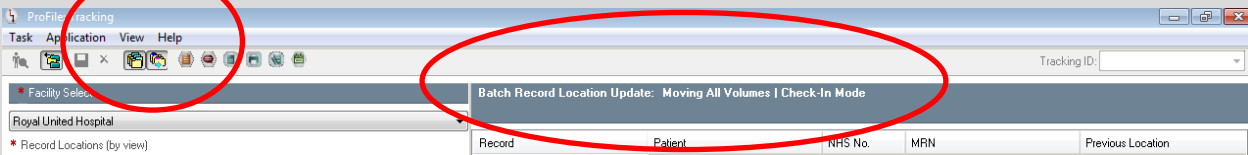
Step 7. Click the **Save**  icon from the top toolbar. The list disappears and the case notes have been tracked.


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:



If it says 'Moving All Volumes' or '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.