

SEARCH FOR A PATIENT


Log on to CareFlow EPR using your network/windows username and password.

From the Navigation Panel on the left-hand side, click on **Master Patient Index** and select **Search for Patient**.

In the search box, enter the patient's search criteria, such as D number.

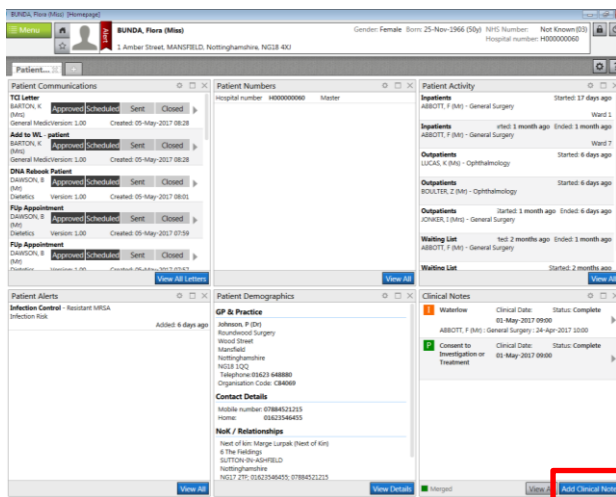
A list of patients' matching the search criteria is displayed. Double click the patient to open their record.

ADD CLINICAL NOTE

Navigate to the patient's Homepage by clicking either the **Patient's Name** or the  icon in the patient banner.

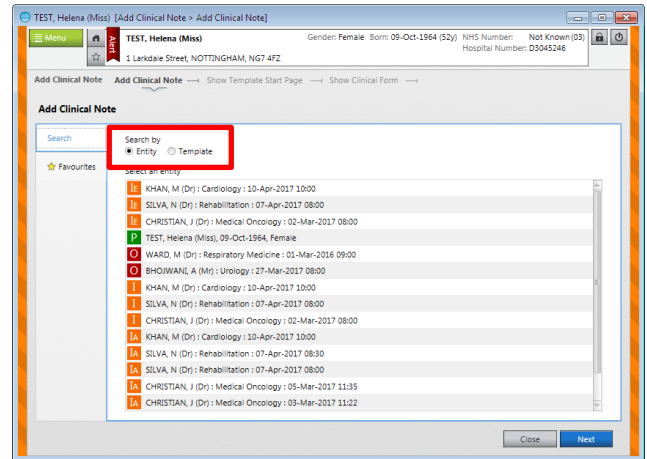


In the Clinical Notes section click **Add Clinical Note**.

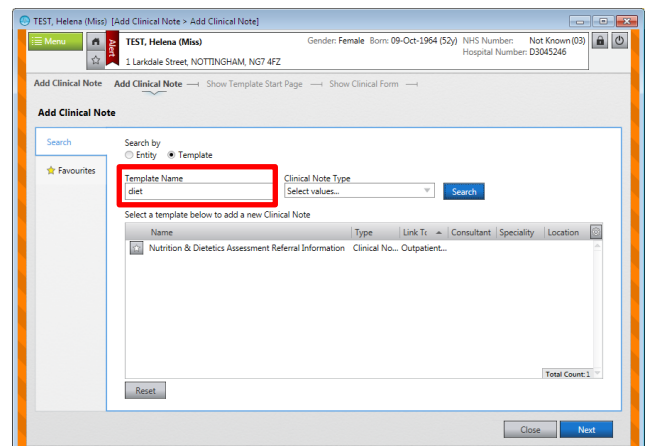


The required Clinical Note can be searched for using either **Entity** or **Template**.

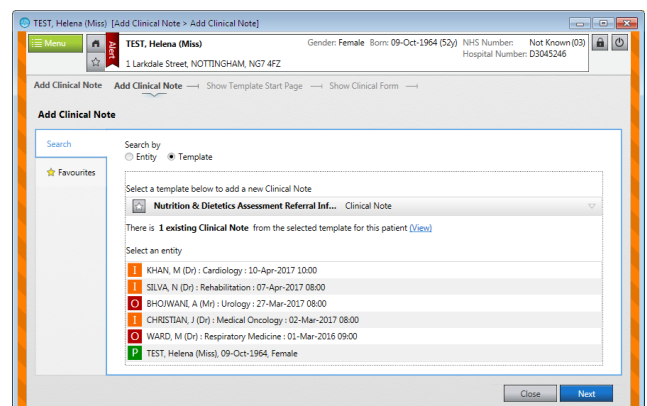
An **Entity** search shows a list of patient activity such as Outpatient or Inpatient. On selecting an entity, only Clinical Notes available against that type of activity are displayed.



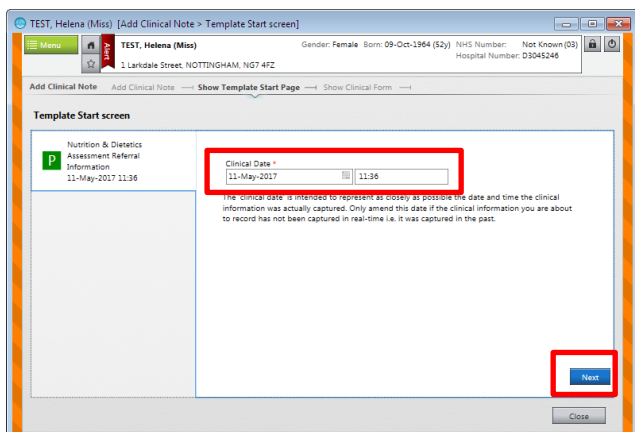
Change the search to **Template**. In the Template Name box enter the title of the Clinical Note (can enter partial name) and click **Search**.



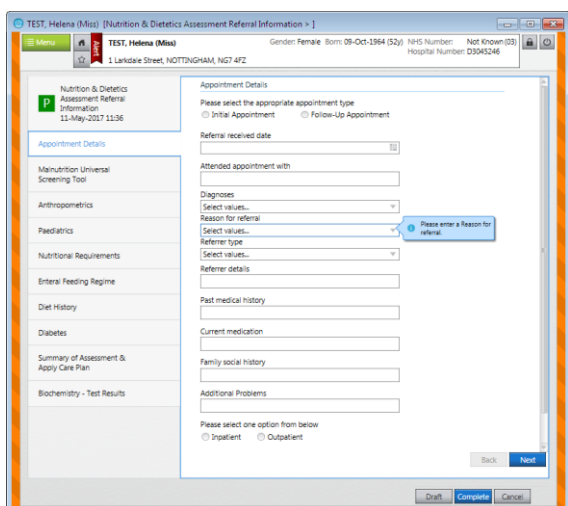
Select the template (Clinical Note) from the list and click **Next**. A list of entities are displayed. Click the entity to link the template to and click **Next**.



The first page is displayed where the Clinical Date can be backdated where necessary. Click **Next** to navigate to the next page.



A template contains either free text boxes, drop down boxes and radio buttons. Work through the pages entering information as required.



Please note the following:

- A mandatory field is indicated by a **red ***
- A **Reset** button may be available against a radio button that deselects it if chosen in error
- A page may contain calculations or scores
- Some options or even pages are dependent on the previous selection so may only be available with specific answers
- If a mistake is made or information added incorrectly, **Help**, which is a type of error message, is displayed at the bottom of the screen - click to view details

Once the information has been entered, click **Complete** or **Draft** (saved for future editing).

For some services, a letter may be printed when the Clinical Note is marked as Completed. Please see the **Clinical Note Letters** quick reference guide.

Note: Once Complete or Draft is chosen the template cannot be deleted afterwards, only **Excluded** (hidden from view)

AMEND / UPDATE CLINICAL NOTE

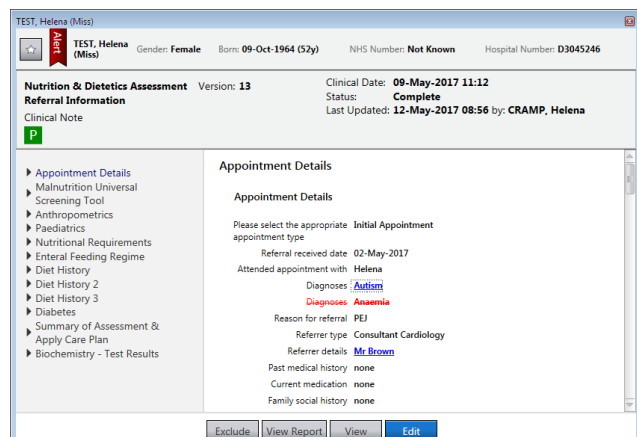
A Clinical Note can be edited when in Draft or Completed form. Navigate to the template and click **Edit**. Make the necessary changes and click **Complete**.

If another user tries to edit the same template, a prompt will display who is currently updating the template. However, the user must complete the changes within 30 minutes as indicated in the message at the bottom of the screen.

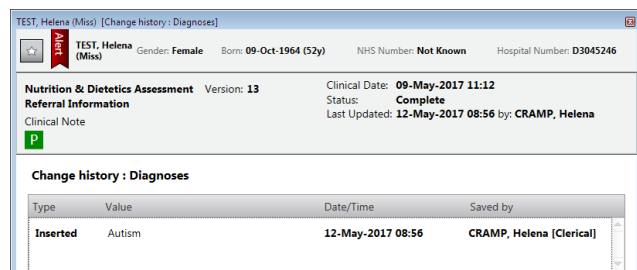
You have this document locked until 11-May-2017 12:29 - please save your work before this time.

- If the user tries to save the template after the locked time **but no other user has tried to amend it**, the changes **WILL** be saved
- If the user tries to save the template after the locked time **but another user has made amendments**, they **take ownership**, and the changes will **NOT** be saved

Once amendments have been made and saved, when viewing the template, the changes made are indicated in **blue text** and the deletions are indicated in **red text**.



Clicking either the blue or red text will show an audit.



CONTACT

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