# SystmOne Guide

## Contents

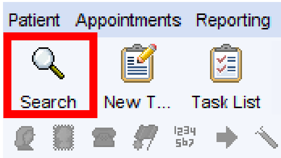


**This is a generic user guide, therefore not organisationally specific and is current as of 07/02/2020**

# SEARCHING AND RETRIEVING A PATIENT

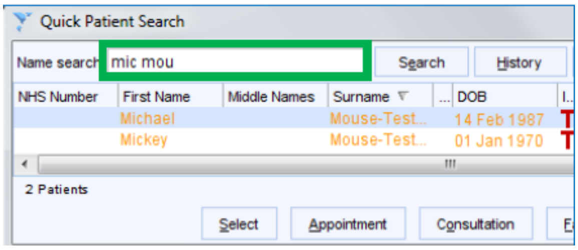
There are many ways you can open a patient record within SystmOne; they are -

## Big Button Toolbar or F10




These options will both take you to the **Quick Patient Search Dialog**.

Quick Patient Search dialog has been designed to make it as quick as possible for you to search for a patient using their name, NHS number or date of birth.




If searching on name, add the **first 3 letters of the patients first and last name** and click search. Ensure you check that DOB and NHS details are correct before retrieving the patient.

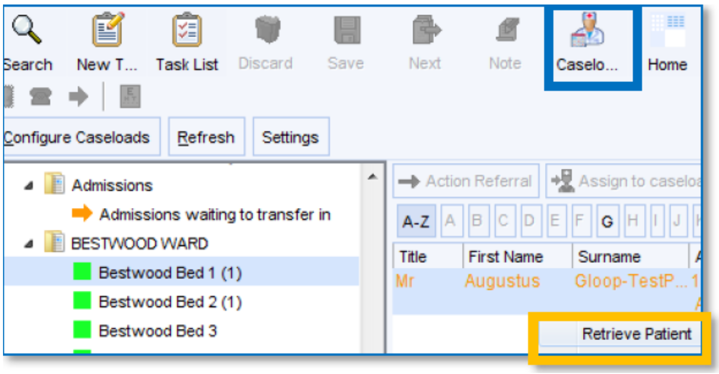
When you have found the patient whose record you want to retrieve using the Quick Patient Search dialog, you can do one of the following to retrieve the patient record:

- Double click on the patient in the list to retrieve the patient record, or
- Select the patient from the list and click Select, or
- Select the patient from the list and click Consultation if you want to retrieve the patient and immediately begin a consultation write up.

While you are waiting for the patient to be retrieved, a progress bar is displayed; Retrieval may take a few seconds, according to the size of the patient record.

## Opening from a Caseload

If you know the caseload/bed your patient is sitting within, then you can retrieve them from within a caseload.



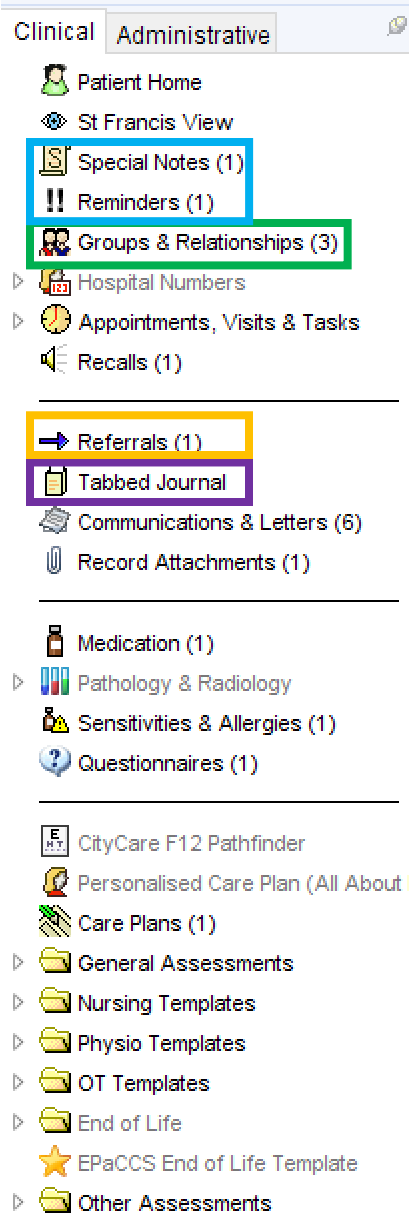

Click on the **Caseload** icon.

Click on the caseload the patient is in, then right click on the patient and select **Retrieve Patient**.

## THE PATIENTS RECORD - CLINICIAL TREE

When you open a patient record you will be able to see the clinical tree tab, this tab is displayed by default when you retrieve the patient record. You can access all the clinical data saved for a patient for example care plans, data entry templates etc.  There is also an administrative tab which can be useful but not vital.

When you click on any of the 'nodes' on the tree it will display the information on the right-hand side of the tree. The numbers in brackets on each of the nodes indicates the number of current entries contained in that node. For example, below the patient currently has a Sensitivity or allergy.




**Special notes** - Special notes are like a reminder but are visible regardless of sharing preferences, if there is a special note within the patients record you will see the icon in the demographics box and the node will be highlighted.

There are three types of special note:

- ***Special Note*** – to alert other care providers that the patient has a palliative diagnosis.
- ***Safe Haven*** – to alert the care provider to any potential danger that they may be in when seeing the patient (for example, potentially violent patient or patient has a violent relative).
- ***Frequent Callers*** – to identify patients who frequently call the service.

**Reminders** - Reminders allow you to set a message that is displayed on the Patient Home view whenever the patient record is retrieved

**Groups & Relationships –** This is where any relations, medical or non-medical associations /organisations are visible, can be added, amended or removed (Only if recorded)

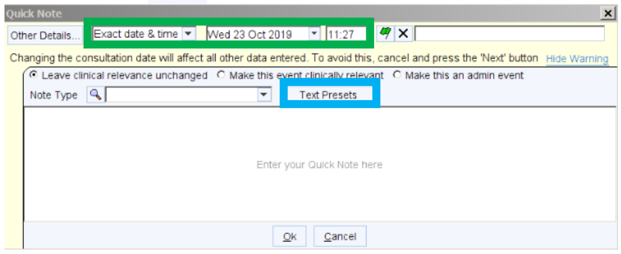
**Referrals** – This is where you can amend Date of Actions, Referral Status's and Caseloads with the current referral in. You can also view information like which pathway they are on, and when they were referred to your unit

**Tabbed Journal** - The Tabbed Journal displays all patient data in date order on different tabs according to where it was entered. This makes it easier to separate out data recorded at your organisation or, for example, at the patients GP Practice. This is the only area you can see all consultations & quick notes in relation to the patient

## ADDING DATA TO PATIENTS RECORDS – QUICK NOTES

To add a note into the Journal within a patient record use the Quick Note icon

This will allow you to add free text into the record which is documented as an admin or clinical event.

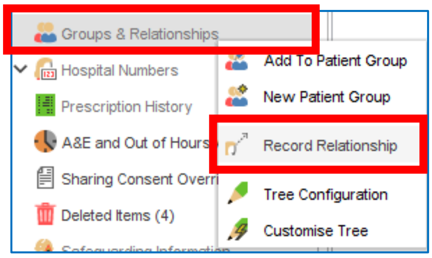



You have the option to create your own **list of Presets** (If you find that you write the same things repeatedly).

If you need to back date the note for any reason, you can also change the **date/time**

## ADDING DATA TO PATIENTS RECORDS – GROUPS AND RELATIONSHIPS

To enter any information into the Groups & Relationships node you can right click on the node and choose Record Relationship.




It will then allow you to choose the relationship type from a list.

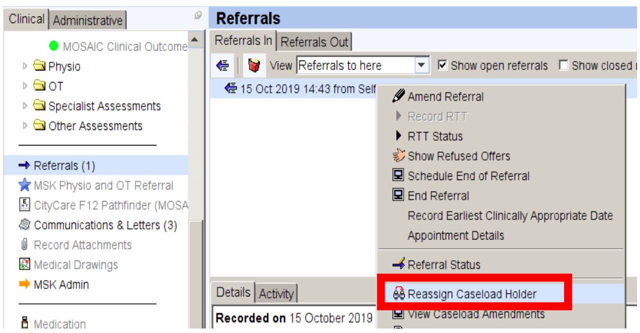
Or you can use the search function at the top to search which relationship you wish to record.

You will then be given a choice of how to record the relationship. For example if you want to record it as a textual relationship, use the organisations address book (If it is a known organisation) or if you want to link it to another patient record; this can be done using a patient cared for at the organisation or a patient elsewhere as long as you have the NHS number. Please choose advised by your service lead.

If you have chosen a SystmOne user, Address book or patient etc. you will need to search for them to allow you to add the link. If you have chosen to add a textual relationship, you will be presented with a details screen allowing you to add as much information as you have about the individual, including their name and contact details.

## REASSIGNING PATIENTS TO ANOTHER CASELOAD – WHEN IN A PATIENT RECORD

When a patient comes into the service they will placed into the unallocated caseload, then moved to a main caseload. To do this when in a patient record complete the following –



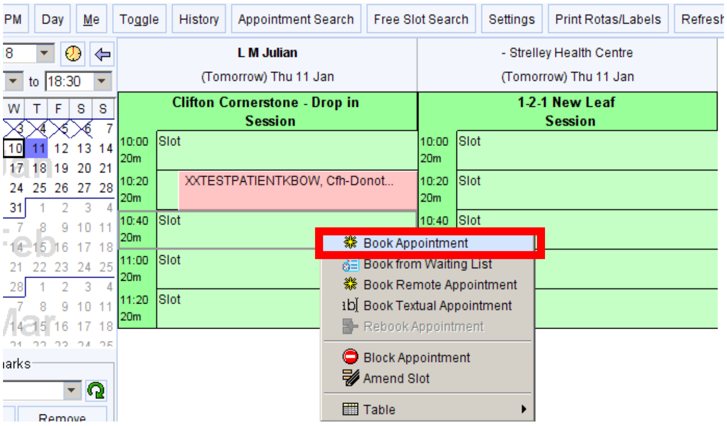

1. Highlight the Referrals node on the clinical tree
2. Right click on the referral and choose **Reassign Caseload Holder**
3. Either then search whom you wish to reassign the patient to or choose in the list. Click Ok once completed
4. A question will appear 'Are you sure you want to move xxxx to the caseload xxxx?' Choose Yes

**Once the patient has been saved the patient will transfer caseloads**

## BOOKING APPOINTMENTS – BOOKING CURRENTLY REGISTERED PATIENTS

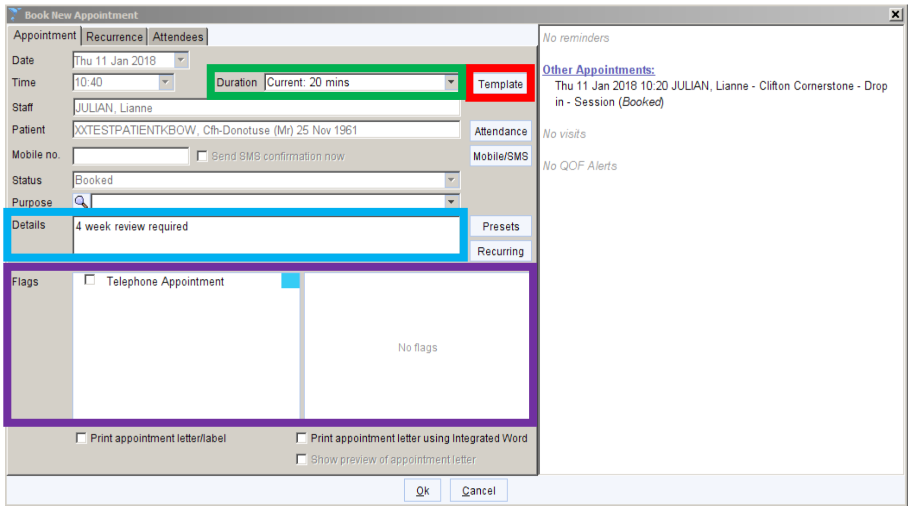
1. From the Appointment Ledger locate the session you wish to book into and then Right-Click on an available slot space

2. Select **Book appointment**




3. Search for the client/patient you wish to create the booking for (if you are not in the client/patient record).

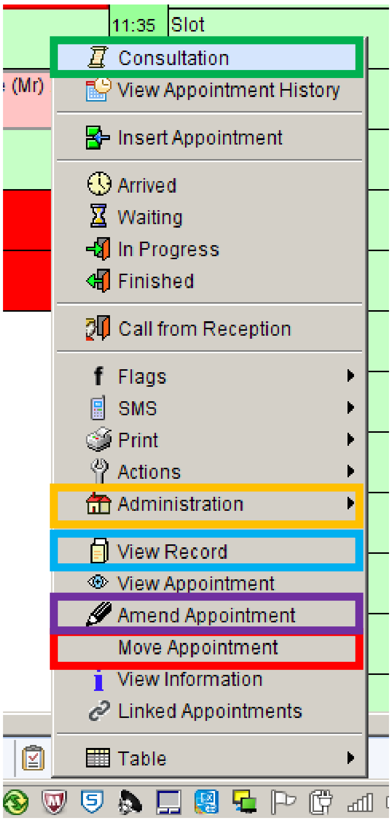
4. When the "Book New Appointment" template appears, complete any sections that are required e.g. **Duration**, **Details** or **Flags**; Alternately use **Appointment Templates** if used within your organisation.




5. Click "ok" to the Book New appointment window that now appears.

6. Your patient will now have been booked into the ledger.

## BOOKING APPOINTMENTS – ADDITIONAL OPTIONS ON A BOOKED APPOINTMENT > RIGHT CLICK




Start your consultation with the client/patient

Within the administration area, you can mark as –

- **Did Not Attend -** Appointments marked with this reason become green
- **Cancelled by Unit**
- **Cancelled by Patient**
- **Cancelled by Other Service**

With any of the above options you need to write some notes within the patient's record, to show the actions taken.

Go into the clients/patients record

On this option you can amend the selected appointment duration, flags & notes/details.

On this option you can move an appointment you have selected (but only if they have just booked it in with you, otherwise please cancel & re-book now – see cancelling appointments section for further details)

## CANCELLING APPOINTMENTS – THIS WOULD BE UNIT SPECIFIC, PLEASE SPEAK TO YOUR LINE MANAGER

## MANAGING VISITS – VISITS SCREEN

Staff can only be assigned visit requests and appear on the Visits screen if a System Administrator has:

- Granted the staff member the 'Sees patients' access right, and
- Added the person to the list of staff members who can be assigned visits via the 'Visits' node in Organisation Preferences

Select **Visits** from the **Large Toolbar or click the Appointments menu and select Visits**

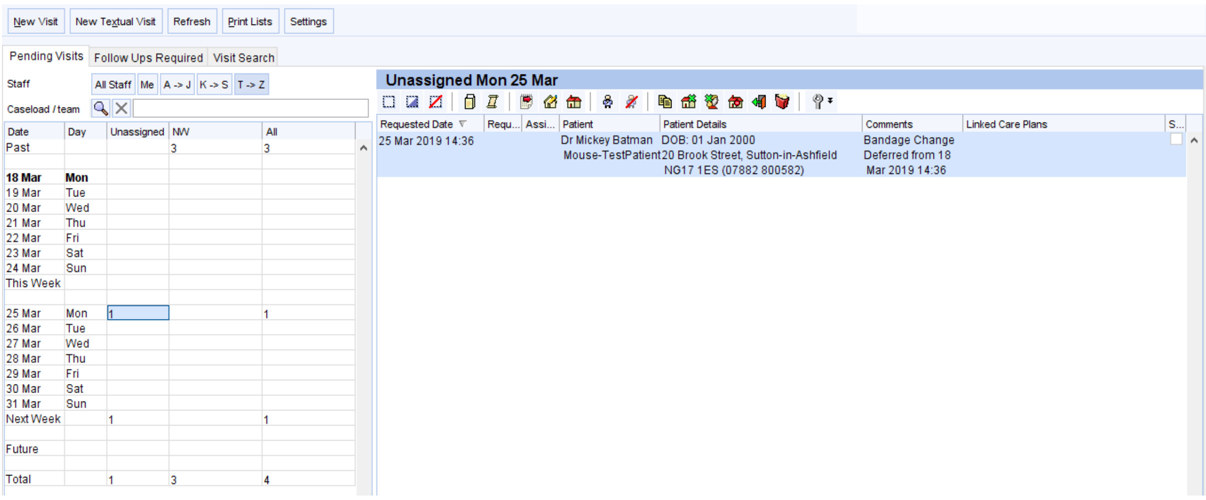
The visits screen splits into 3 tabs:

1. **Pending Visits** – Displays a grid view of **outstanding and past unfinished** visits only, shown in order of date and by the clinician they have been assigned to
2. **Follow Ups Required** – Displays any visits that are required but have not yet had a date booked
3. **Visit Search** – Allows a search to be conducted for visits that have been dealt with, cancelled, or those where no access was gained

## MANAGING VISITS – VIEW PENDING VISITS

To view a clinician's visits for a particular day, select the number in the grid against the clinician's column and the date's row. The right-hand side of the screen then displays the corresponding planned visits

The Unassigned column should be empty as all visits should be allocated to a clinician



# MANAGING VISITS – CREATE A NEW VISIT

1. Select New Visit from within the Visits Screen
2. If your organisation has more than one branch/site, select the relevant site, if applicable, and click Ok, or double-click on the relevant site
3. Search and select the patient who requires the visit and click OK
4. The Record Visit window will then appear
5. Complete the Visit Tab as required (Click Ok once finished):

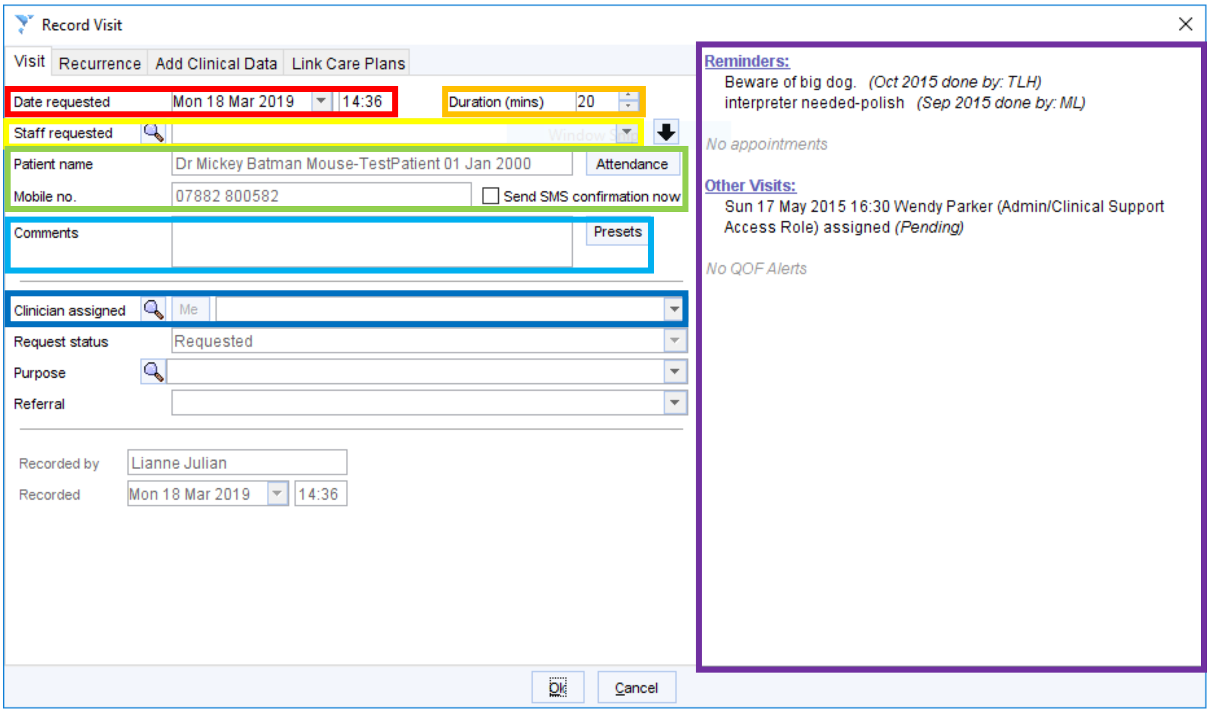
Specify the date & time the patient requires the visit

Set/amend the duration of the visit

Select the staff member requested by the patient from the Staff requested drop-down list or leave blank if not known (This is not who will see the patient)

These are the patient's details

Any notes are to be written into the Comments field (Presets can be set up)




Select the staff member who is being assigned the home visit (if it is the same as the staff being requested you can click the ⬇ and it will be automatically assigned)

Here you can view information pulled from the patients record including – Reminders, Future Visits, Appointments and any QOF Alerts (which can be helpful)

## MANAGING VISITS – CREATE RECURRENCE VISITS (WITH SAME DETAILS)

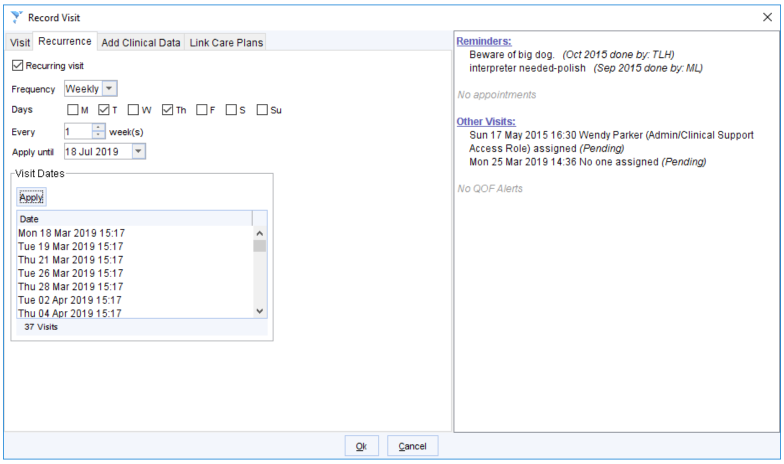
1. Complete the Visit Tab as required and then click the Recurrence Tab

2. Tick Recurring visit

3. Specify the visit frequency:
    - **Daily**
    - **Weekly** – select the days of the week when the patient should be visited and use the Every [n] week(s) field to specify the frequency.
    - **Monthly** – select the days of the week when the patient should be visited; use the Every [n] month(s) field to specify the frequency and specify in which week of the month the visit should take place.

4. Use the Apply until field to record an end date for the visits; you can use 4m if you wish to apply 4 months' worth of visits

5. Click Apply and check the dates listed in the field underneath and then click Ok

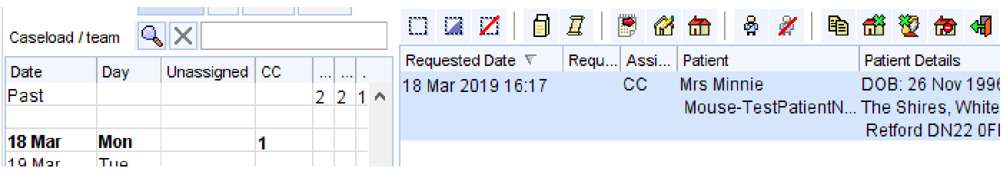



## MANAGING VISITS – REASSIGN VISITS

Visits can be easily reassigned to different clinicians:

1. Locate the visit you wish to assign in the main body of the visits screen (right hand side) then either-
    - Right click the visit and select Amend > Change the Clinician Assigned to the designated clinician > The visit now appears in the clinician's column against the visit date
    - Right click the visit and Select Assign Clinician > This will then open an A-Z for surnames, or you can open a search box for staff members
    - Highlight the visit > Click on (Assign the selected visit to a clinician) > a search box with all staff members will then appear

2. The Clinicians initials will then appear on Assigned Clinicians column on the right-hand side window and within their assigned visit list on the left-hand side window (as seen below)



## MANAGING VISITS – PRINT VISIT REQUESTS

A list of visits can be printed at any time.

- Ensure the list of patient visits required is listed on the right-hand side of the Pending Visits screen
- Right click on any patient and select Table > Open as RTF
- Word is opened and the patients are listed in a table view
- Print from word as normal

## MANAGING VISITS – PRINT RECORD SUMMARY

A summary of a patient's electronic record can be printed and taken to the patient's home for reference.

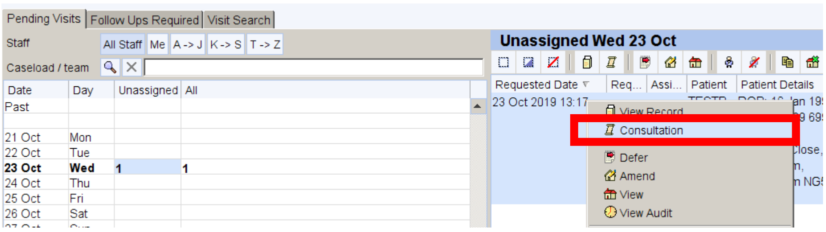
- Ensure the patient's visit is listed on the right-hand side of the Pending Visits screen
- Right click the visit and select Actions then Print Record Summary
- Select the required view and click Ok
- Word is opened, and the patient's summary is displayed
- Print from word as normal

**Alternatively, you can print off the visits screen and Quick Glance Summary at the same time by highlighting your date and clicking 'Print Lists'**

## MANAGING VISITS – WRITING UP NOTES/CONSULTATIONS AFTER A VISIT

If home visits have been assigned to you, you can click on your Visits 'To do' buttons > Right click on your allocated visits > Choose 'Consultation'

Alternately you can right click on the visit from the Visits screen > Choose **Consultation**




Once you have saved the record and completed the Event Details Screen click the Ok button, a question will appear > 'Are you sure you want to mark this visit as Finished?' Click **YES**

Another question will then appear > 'Will the patient require a follow up visit?' Either choose **Book Now** or **No** – Choose as appropriate (Only choose Book Later if instructed to do so by your service lead)

The completed home visit will now be removed from the visits screen

## WAITING LIST MANAGMENT – ADDING PATIENTS TO A WAITING LIST

1. Within the Waiting List screen
2. Click on the relevant Waiting List i.e. '4 Week Follow-ups'
3. Click Add Patient
4. Search for the Patient (if you are not in the Patients Record) and then click OK
5. Due dates can be used if set dates/times need to be achieved – Click OK to add them to this list
6. Waiting Lists should be monitored regularly to check any set dates are not being breached.

## WAITING LIST MANAGMENT – RETRIEVING A PATIENT RECORD FROM THE WAITING LIST WINDOW

1. Within the Waiting List screen
2. Click on the relevant Waiting List i.e. '4 Week Follow-ups' and highlight the Patients name
3. Click Retrieve Patient (or right click)
4. Add any additional data into the patients record
5. Save Patient record

## WAITING LIST MANAGEMENT - AMENDING VISIBLE WAITING LIST NOTES

1. Within the Waiting List screen
2. Click on the relevant Waiting List and highlight the Patients name
3. Click Amend (or right click)
4. Choose Amend Notes
5. Write in the date and any comments, click Ok
6. These notes will appear within the Waiting List note field

## WAITING LIST MANAGEMENT - MOVING PATIENTS TO A DIFFERENT WAITING LIST E.G. RESPONSE

1. Within the Waiting List screen
2. Click on the current Waiting List the Patient is located
3. Highlight the Patients name
4. Right click and click Move to Waiting List
5. Choose Waiting List wishing to move to
6. Click yes to the question 'Are you sure you want to move the selected patient(s) to waiting list?'
7. Click yes to the following question 'The waiting lists selected have different target wait times. Do you want to update the due date to match the new waiting list?
8. The Patient will now be moved.
9. Add any notes if required.

## WAITING LIST MANAGEMENT - REMOVING PATIENTS OFF WAITING LISTS

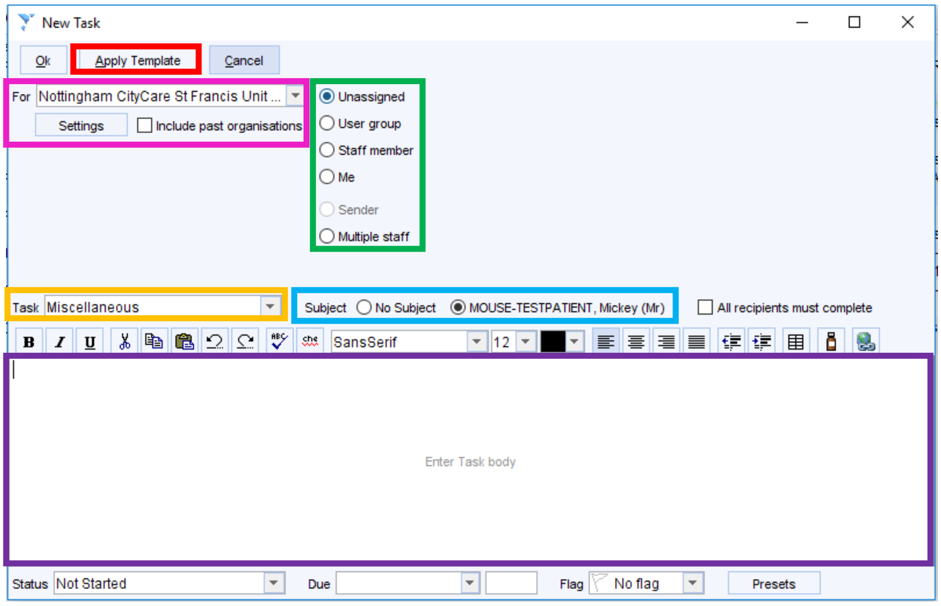
1. Within the Waiting List screen
2. Click on the current Waiting List the Patient is located
3. Highlight the Patients name
4. Remove Patient
5. Click completed to the following question a question will be asked 'Do you want to mark this wait as completed or simply delete this patient from the waiting list?' The Patient will now be removed

## TASK MANAGEMENT - SENDING TASKS

Within SystmOne you can send patient related tasks or non-patient related tasks to other individuals. If you wish to send a patient related task you MUST be within the patient record, click Task from the large toolbar, you will then see the New Task Template.

**For:** Which Organisation would like to send the Task to? This automatically shows your unit, but the dropdown arrow allows you to task other organisations that also care for the patient for example their GP Practice

You can apply a task template, if one has been created. There is currently a discharge template available for use. To use, double click on the required template and then amend the 'For' and recipient sections




Who would you like to send the task to within the organisation? User Groups will be set up within your unit, you can send to yourself too if required

Choose the task type (use the dropdown)

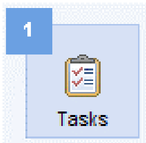
If in a patient record the subject will automatically default to the patient. If you wish to change this to a non-patient related task change the radio dot

Type in the body of your task here

Once you have finished creating your task and wish to send click OK. If you are currently in a patient the task will not send until you save the record.

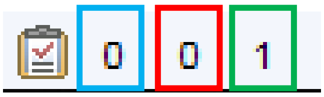
## TASK MANAGEMENT - DEALING WITH TASKS

You will know that you have tasks to deal with as they will be shown in various areas, on the home screen you will have a number on the Task 'to do' icons (as seen on the right-hand side).




This icon will disappear once you start moving within the System, so you may wish to be aware that the counters at the bottom of the screen – They will increase if you receive a task within your unit or decrease once completed.

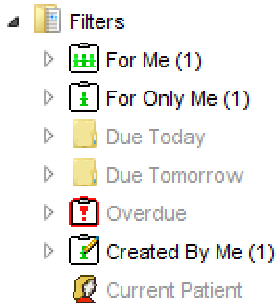
On the Task Counters you will see 3 sets of numbers within the task counter (you can double click on any of these numbers to take you through to the Task List screen, alternatively you can open the Task List by using the big button toolbar or Ctrl + T.




This number shows if you have any tasks that been assigned to only you

This number shows if you have any tasks that been assigned to you or a user group you are within

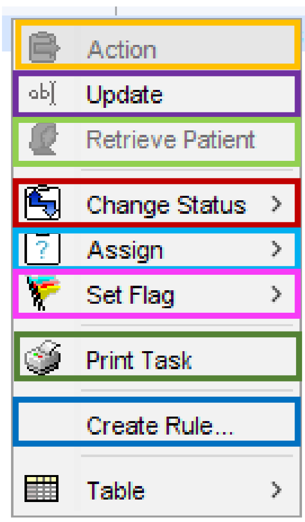
This number shows if you have any tasks that been unassigned




Once you are in the Task List you will see the breakdown of all the tasks.

You will be concentrating on the 'Filters' section – halfway down; if required click the ▷ to view the sub-folders that break down further to the task type. On the right of the list your tasks will appear. The task can be managed from a right click.

On a right you will have the options to -




**Action** the selected task(s) - The relevant dialog is opened to allow you to take the appropriate action

**Update** the selected task(s) - The Update Task dialog opens, allowing you to update all elements of the task (send back to sender, write additional notes etc)

**Retrieve Patient** - Retrieve the patient record linked to the selected task

**Change Status** - of the selected task for e.g. marking it as complete

**Assign** the selected task(s) - Assign the selected tasks to yourself, to a user or to a user group

**Set a Flag** - Assign a coloured flag to the selected task (only use if directed)

**Print Task** – Please try to refrain from using this option

**Create Rule** - A rule can be created to assign to a set person or user group automatically. The rule can be based on the following attributes:

- Task type
- Sending organisation
- Sending user

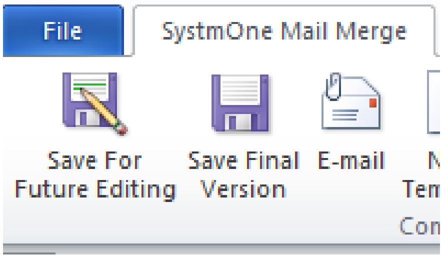
Once a task has been completed (or deleted) it will remove from your Task List screen, unless the creator of the task marked 'All recipients must complete' when they created the task. Once all these recipients have done so it be removed.

## SENDING AN INDIVIDUAL PATIENT LETTER

To send a letter for example DNA or Referral Letters you will need to follow these steps from within the Clients/Patients record-

1. Go into the patients record
2. Right click on the communications & Letter node on the clinical tree
3. Click New Letter
4. Choose your sender and recipient
5. The New Letter Template will appear, with sender and recipient details included. At the bottom of this template ensure that the MS Word radio dot is selected, then click Choose Template
6. Choose your required Template by looking through the files or searching on the file name
7. Click Ok
8. Ensure the Letter Type is correct
9. Then click Write Now
10. This will open the letter, please amend as required
11. Once completed the letter, you then have 2 main options –

- **Save for Future editing** - If not the final version, this allows you to amend the content in the future. (To amend in the future on the Communications & Letters node, highlight the letter > right click > amend content)
- **Save Final Version** - If you have completed the letter and you are then going to be Printing, Signing and Sending off. Click yes to 'Are you sure you wish to save this as the final version?' Doing so will mean that you will not be able to edit this in the future.



## SPINE PATIENT RECORD DIFFERENCES – OCCASIONALLY SEEN ON ENTERING A PATIENT RECORD

**What is PDS? (Personal Demographics Service)**

The Personal Demographics Service (PDS) is the national electronic database of NHS patient demographic details such as name, address, date of birth, NHS Number and telephone numbers.

It is important that these personal patient details held on the spine are identical to those on SystmOne. To ensure the details are correct, when a patient record is retrieved in SystmOne you might be asked to 'match' the record to the corresponding details / record held on the spine. Once completed this screen will not appear again unless demographic data is updated anywhere else, i.e. Health Visiting Unit.

**How do we deal with PDS differences?**

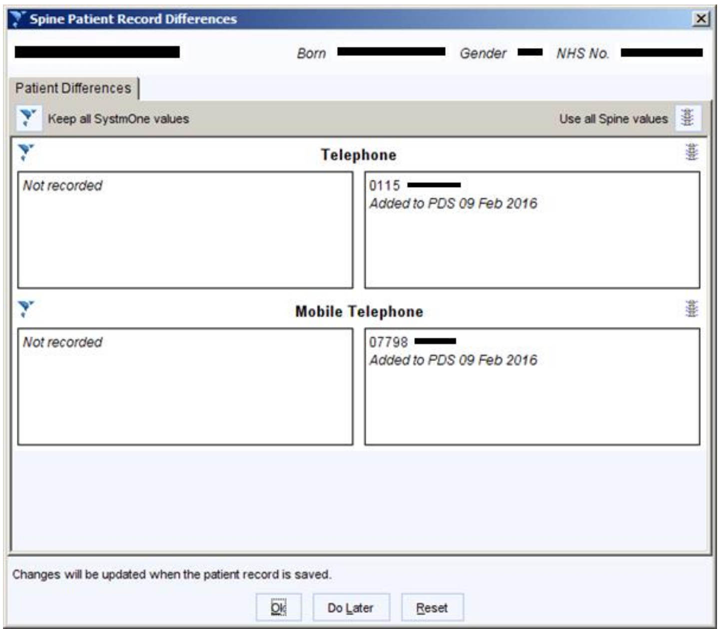
You will firstly be presented with the PDS screen (illustrated below). The left side of the screen represents demographic data held at your unit; the right tells us what data the 'Spine' holds. You will need to compare the data in each of these boxes and select the correct demographic information/most up to date information. If no data is held at your unit (left side), it is recommended to accept the data held within the spine.

**How do I quickly accept all the Spine or SystmOne data held?**

**a.** Select the 'Keep all SystmOne Values' icon if you know that all the SystmOne data is correct and click 'Ok' or;

**b.** 'Use all Spine Values' icon if all of the spine data is correct and click 'Ok' or;

**c.** Alternatively, you can select individual data from within the 'Spine' and/or your data held. E.g. the Telephone number might be correct at your unit, but the Mobile number is correct within the 'Spine'. Simply click on the correct data held and select 'Ok'.



## USEFUL SHORTCUTS WITHIN SYSTMONE

| | |
|---|---|
| **F1** | Help |
| **F2** | Set Favourite Screen |
| **F3** | Create Quick recall |
| **F4** | Staff Browser |
| **F5** | Refresh Screen |
| **F6** | Save |
| **F7** | Spell Check |
| **F8** | Home Screen |
| **F9** | Appointment Search |
| **F10** | Quick Patient Search |
| **F11** | Lock Out Security |
| **F12** | Template Launcher |

| | |
|---|---|
| **Ctrl + K** | New Task |
| **Ctrl + R** | New Notification |
| **Ctrl + H** | Go to Visits screen |
| **Ctrl + F2** | Go to Favourite Screen |
| **Ctrl + F6** | Discard the patient record |
| **Ctrl + F9** | Free Slot Search dialog |

| |
|---|
| Ctrl + Shift + Enter = Panic Button |

### Date Shortcuts (when typing within a Date field without any separators)

| | |
|---|---|
| 6 digits | i.e. 121018 = 12th October 2018 |
| 4 digits | i.e. 1210 = 12th October 2018. SystmOne assumes the date is this year |
| 2 digits | i.e. 12 = 12th October 2018 SystmOne assumes the date is this month and year |
| [n]d/w/m/y | Moves the currently displayed date forward the specified number of days/weeks/months/years, e.g. 3w = moves the date forward 3 weeks |
| -[n]d/w/m/y | Moves the currently displayed date back the specified number of days/weeks/months/years, e.g. -2w = moves the date back 2 weeks |

### Data Entry Shortcuts (when typing within a field)

- **Height** = shows in meters but if you add the 5(space)3 it will convert to meters for you to be 1.6m
- **Weight** = shows in Kilograms but if you add the 12(space)6 it will convert to Kg for you to be 78.926kg