

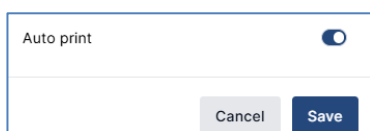
CASENOTE TRACKING – CREATE / ADD AN E-FOLDER CASENOTE / VOLUME AND PRINT A MEDIVIEWER COVERSHEET

Coversheets, for Encounters, should be printed from MediViewer to put together a blue E-Folder. Then check whether an E-Folder Casenote Type exists against the patient already in CareFlow PAS – they might be being seen in Outpatients or on a Ward:

- If already active, add a new Casenote Volume for that E-Folder
- If not currently active, create an E-Folder Casenote

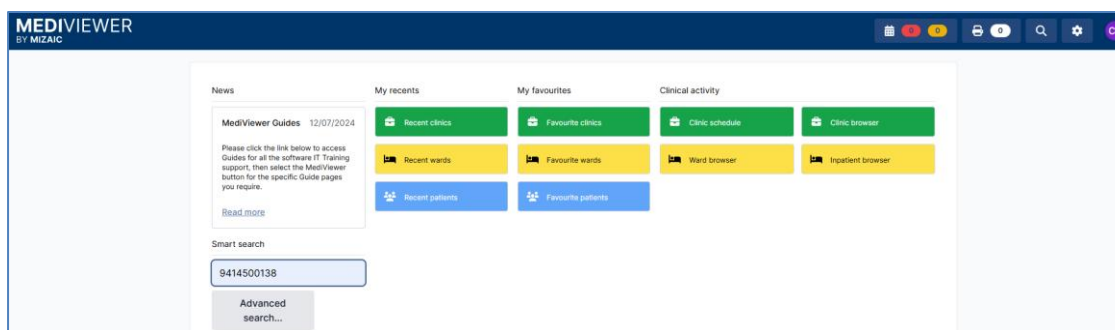
PRINT A MEDIVIEWER COVERSHEET

Note: Make sure you have **Saved** MediViewer's **Auto Print to On**, in the Settings **Cog**  icon > **Preferences**, before you print:



Once you have set this default, you won't need to change it ever again.

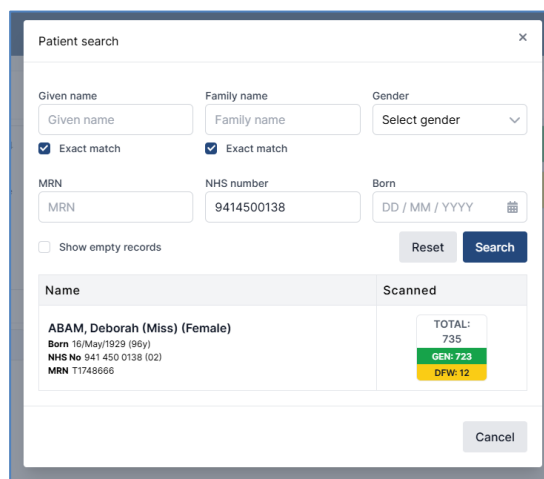
Once in MediViewer:



Type the patient's **NHS Number** (or the **Hospital Number**, if they don't have an NHS no.) into the **Smart Search** field.

Press **Enter** on the keyboard

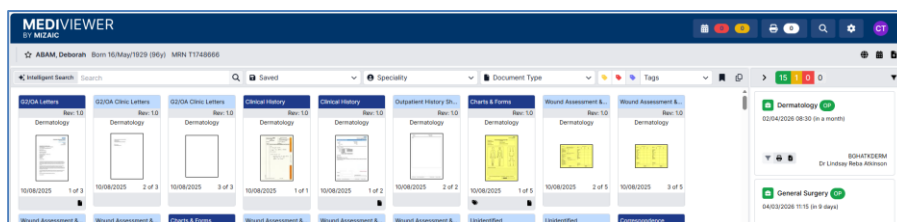
The **Search Results** window displays:



Name	Scanned
ABAM, Deborah (Miss) (Female) Born 16/May/1929 (96y) NHS No 941 450 0138 (02) MRN T1748666	TOTAL: 735 GEN: 723 DFW: 12

Select the **patient's name** from the list of results

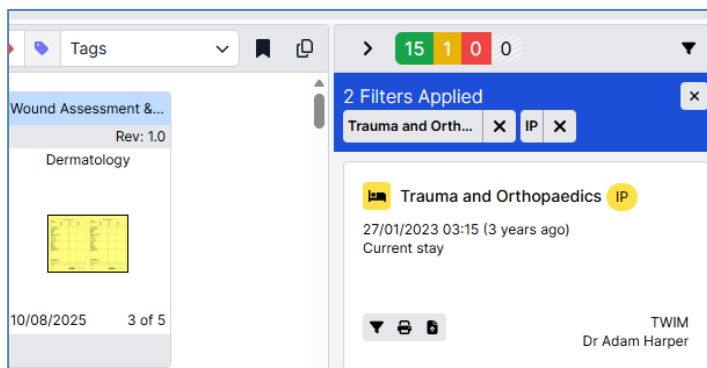
The patient's **Health Record** displays:



Find the **Encounter**.

Use the Filter Funnel, if necessary, top of Encounter View

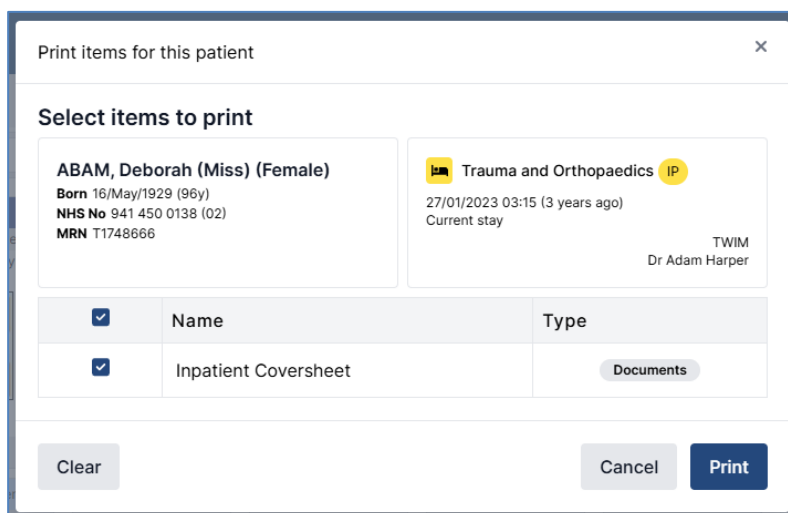
When Filtered, only some of the **Encounters** display:



Click on the **Printer** icon, against the correct Encounter



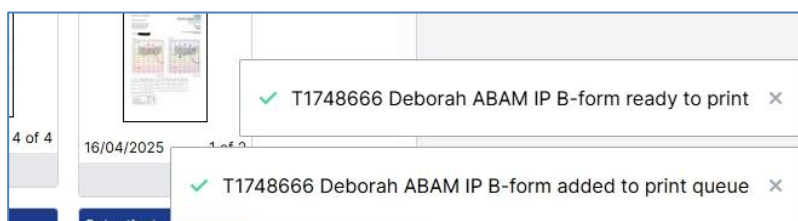
The **Print Items** window displays:



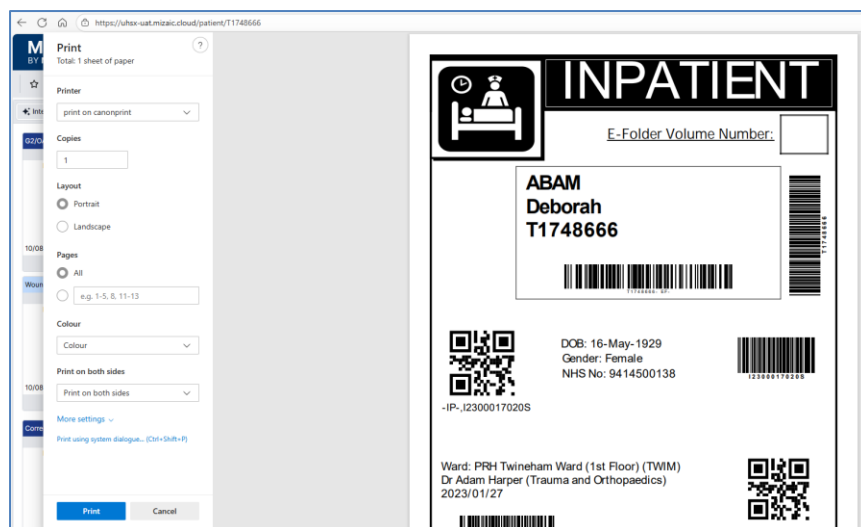
Ensure the appropriate **Coversheet** box is ticked, if more than one.

Click the **Print** button

A pop-up displays in the bottom-right corner:



As long as you have Auto-print turned on, in the Settings Cog, then a Print window displays.



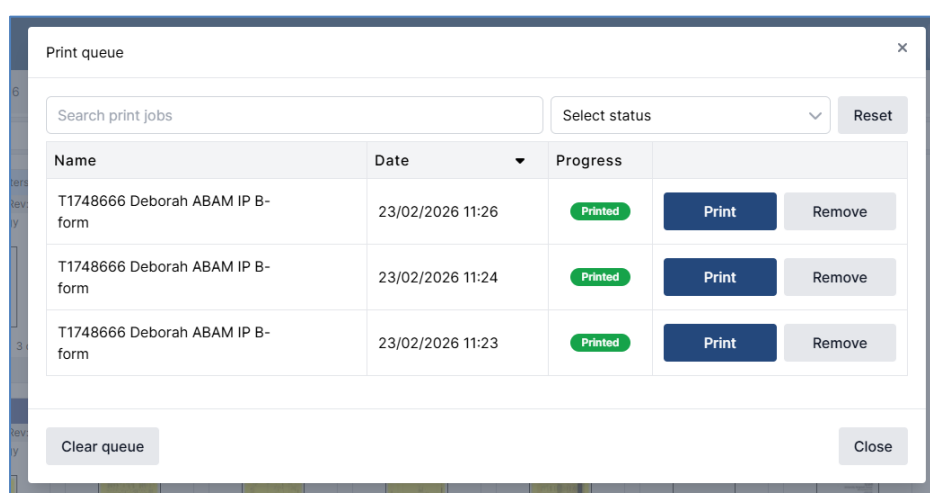
Click on this window's **Print** button

The Coversheet has now been added to the Trust's print queue. Follow the printer process then collect the Coversheet from your printer.

Insert the Coversheet into the relevant E-Folder (Inpatient or Outpatient) as required. **NOTE:** you will need to write the Volume Number in the box, top-right of the sheet, once you have created the Casenote/Volume in PAS.



Whilst the **Printer** icon in the Banner displays no change in number, from prior to the MediViewer Print button being pressed, a history of all your autoprinted (and export downloaded) Pages display.



Click on the Printer icon, regularly, to clear down this history, with the Clear Queue button. MediViewer's Print Queue window enables you to reprint (or re-download) pages, should this be necessary e.g. issues with the printer.

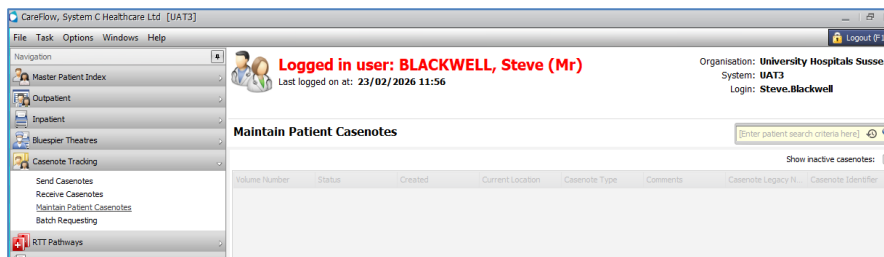
CREATE / ADD AN E-FOLDER CASENOTE / VOLUME

Once you have printed the coversheet for your patient's Encounter, you will need to either **Create an E-Folder** in PAS, if one doesn't exist, or **Add a new E-Folder Volume**, if E-Folder(s) is currently in use.

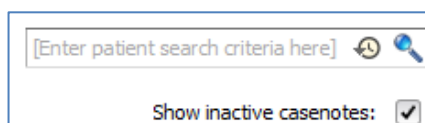
Once in CareFlow PAS:

Click on the **Casenote Tracking** module then click on **Maintain Patient Casenotes**

The **Maintain Patient Casenotes** screen displays:



Search for your patient then tick the box to **Show inactive casenotes**



This is to make sure there isn't an inactive E-Folder casenote already which you can reactivate.

At this point, on a right-click, you have two suitable options: **Add Casenote** and **Add Volume**.

Continue directly below for Add Casenote, when the E-Folder option doesn't exist or skip further down to the Add Volume section, where it does and other E-Folders are still in use, in other departments.

Add Casenote required

ABAYASEKARA, Paul John (Master) Gender: Male Born: 25-Apr-1962 (63y) Hospital number: T2396253
7 Woodgate Park, Woodgate, CHICHESTER, West Sussex, PO20 3QP NHS Number: 971 604 9102 (01)

Maintain Patient Casenotes

[Enter patient search criteria here]

Show inactive casenotes:

Volume Number	Status	Created	Current Location	Casenote Type	Comments	Casenote Legacy N...	Casenote Identifier
Category: Trust Casenotes							
2	Active	PRH Same Day Eme...	RSCH Health Recor...	Trust Casenotes		T2396253-	G-002
1	Active	RSCH Health Recor...	RSCH Casenote Des...	Trust Casenotes		T2396253-	G-001

- Add Casenote
- Add Volume
- Edit Volume
- Mark as Lost
- Mark as Destroyed
- Mark as not destroyed
- Merge and Destroy

Add Volume required

ABAM, Deborah (Miss) Gender: Female Born: 16-May-1929 (96y) Hospital number: T1748666
19 Yew Lane, NEW MILTON, Hampshire, BH25 5BA Unverified NHS Number: 941 450 0138 (02)

Maintain Patient Casenotes

[Enter patient search criteria here]

Show inactive casenotes:

Volume Number	Status	Created	Current Location	Casenote Type	Comments	Casenote Legacy N...	Casenote Identifier
Category: E-Folder							
1	Active	RSCH Health Recor...	RSCH Health Recor...	E-Folder		T1748666-	EF-001
2	Active	WOR Gastro Runner	In transit to PRH W...	E-Folder		T1748666-	EF-002
Category: Trust Casenotes							

- Add Casenote
- Add Volume
- Edit Volume
- Mark as Lost
- Mark as Destroyed
- Mark as not destroyed
- Merge and Destroy

CREATE AN E-FOLDER CASENOTE

Right-click then click on **Add Casenote**

The **Add Casenote Volume** window displays:

The screenshot shows the 'Maintain Patient Casenotes' window with a search bar at the top. Below it is a list of casenotes with columns for 'Volume Number' and 'Category: Trust'. The first row is selected. A dialog box titled 'ABAYASEKARA, Paul (Master), 25-Apr-1962 - Add Casenote Volume' is open. In this dialog, the 'Type' dropdown is empty, 'Volumes to create' is 1, and 'Maximum loan period (days)' is 0. The 'Created' field is empty. Below these fields is a table for 'Volume attributes' with columns for 'Attribute', 'Value', 'Date Set', and 'Date Closed'. The table is currently empty. 'Cancel' and 'Save' buttons are at the bottom right.

The 1st volume number is set.

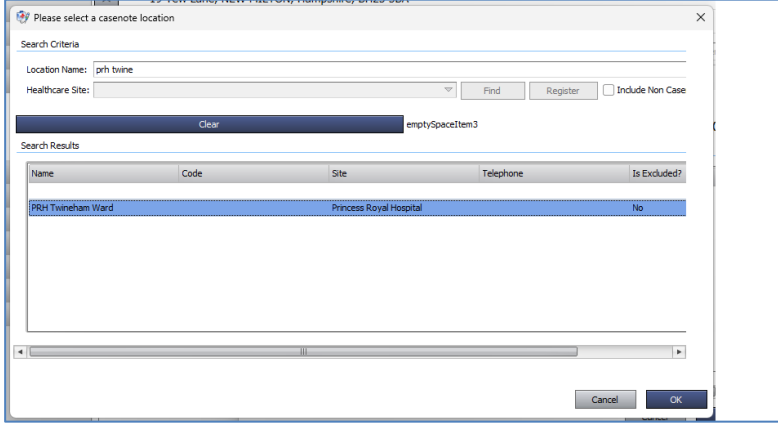
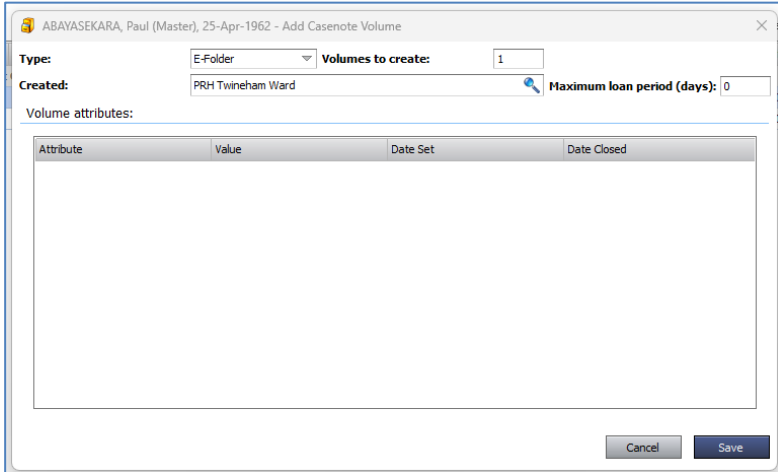

Note: PAS has NOT set the Type and this is required to save the Casenote.

Click into the **Type** field then select **E-Folder**

This screenshot is similar to the previous one, but the 'Type' dropdown in the dialog is now set to 'E-Folder'. All other fields and the 'Volume attributes' table remain the same.

Now type in the location you are in, whilst creating this folder

This screenshot shows the 'Add Casenote Volume' dialog with 'Type' set to 'E-Folder' and the 'Created' field now containing the text 'prh twine'. The 'Volume attributes' table is still empty.

<p>Click on the Location you are in then click the OK button</p>	<p>The window closes and the Created field is now populated with a Location:</p>
<p>Press the ENTER key, on the keyboard, or click the Magnifying Glass icon to search</p>	<p>The Casenote Location window displays:</p> 
<p>Click on the Location you are in then click the OK button</p>	<p>The window closes and the Created field is now populated with a Location:</p> 
<p>Click the Save button to finish adding the new E-Folder</p>	<p>A Print Documents window displays for the patient, with Casenote Labels listed.</p>
<p>Click the Cancel button as you don't need Casenote Labels</p>	<p>This new Casenote can now be tracked in PAS. See the appropriate guides for Send the Casenote and Receive the Casenote within the MPI guides.</p>
<div style="display: flex; align-items: center;">  <p>NOTE: Make sure you write the Volume number you have just created on the MediViewer Coversheet you added to the E-Folder</p> </div>	

ADD A VOLUME TO THE EXISTING E-FOLDER CASENOTE

Right-click on the grey **Category: E-Folder** row then **Add Volume**

Note: if no E-Folder exists, jump back up to **Create an E-Folder Casenote**

The **Add Casenote Volume** window displays:

The screenshot shows the 'Maintain Patient Casenotes' window with a sub-dialog titled 'ABAM, Deborah (Miss), 16-May-1929 - Add Casenote Volume'. The dialog has the following fields and controls:

- Type:** E-Folder
- Volumes to create:** 3
- Created:** (empty text field)
- Maximum loan period (days):** 0
- Volume attributes:** A table with columns: Attribute, Value, Date Set, Date Closed.

The next volume number is set; in this case, 3.

Note: PAS has set the Type as E-Folder because you right-clicked on the **Category: E-Folder** row.

Now type in the location you are in, whilst creating this folder

This screenshot is identical to the previous one, but the 'Created' field in the dialog now contains the text 'prh twine'.

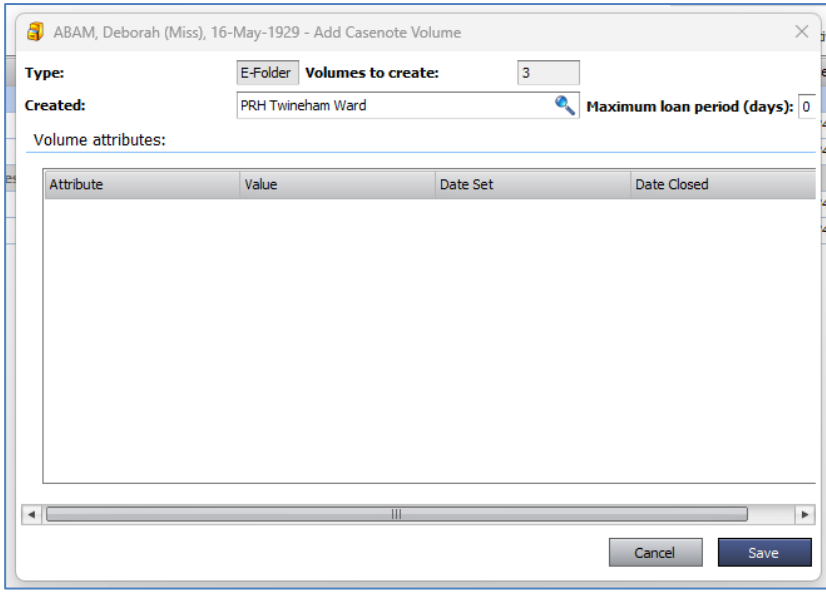
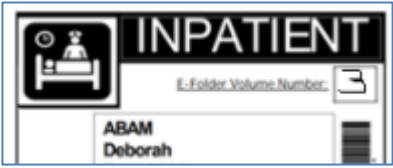
Press the ENTER key, on the keyboard, or click the Magnifying Glass icon to search

The **Casenote Location** window displays:

The screenshot shows a window titled 'Please select a casenote location'. It contains the following elements:

- Search Criteria:** Location Name: prh twine, Healthcare Site: (dropdown), Find, Register, Include Non Case (checkbox).
- Search Results:** A table with columns: Name, Code, Site, Telephone, Is Excluded?.

Name	Code	Site	Telephone	Is Excluded?
PRH Twineham Ward		Princess Royal Hospital		No

<p>Click on the Location you are in then click the OK button</p>	<p>The window closes and the Created field is now populated with a Location:</p> 
<p>Click the Save button to finish adding the new E-Folder</p>	<p>A Print Documents window displays for the patient, with Casenote Labels listed.</p>
<p>Click the Cancel button as you don't need Casenote Labels</p>	<p>This new Casenote can now be tracked in PAS. See the appropriate guides for Send the Casenote and Receive the Casenote within the MPI guides.</p>
<div style="display: flex; align-items: flex-start;">  <div style="margin-left: 20px;"> <p>NOTE: Make sure you write the Volume number you have just created on the MediViewer Coversheet you added to the E-Folder</p> </div> </div>	