Registering Carers on SystmOne

- 1. In order to register a carer, it is necessary to know the name and DOB of the person. The default position should be to share notes to GP and other services (assuming the person consents) but we do **not** request a share of the GP record unless the carer specifically wants this or there is a particular reason to request consent.
- 2. When creating the referral, select 'Bereavement Care' as the Service Offered, even if the patient is still alive and it is 'pre-bereavement work'. It's also important to ensure the referral is added to a caseload so that we can ascribe and report the activity accurately
- 3. Any consultation can be 'marked private'. This means it can be seen by **all** users in our pall care unit, but no one else. To do this, right click the consultation and select 'Mark Event as Private'. If required, this setting can be reversed for a particular consultation at any future time by right clicking it again and selecting 'Part of Shared Record'. See these two screenshots:

Groups & Relationships (12)	- 11 3ch 7014 14.52"	Cazee multuiscipiinary meeting			
@ Communications & Letters (23)	Ua2Ce	Multidisciplinary meeting (Ua2Ce) "read code notes"			
Record Attachments	Notes	test consultation notes	Clinically Relevant		
Medication	Done By	Miss Paula Woodrow (Trainer) - Location: Surgery	Admin Event		
Repeat Templates	▼ 🗍 28 Nov 2014 08:14				
🏠 Sensitivities & Allergies	Done By	Josephine Barker (SystmOne Administrator) @ Telehealth Hub - Loca	Manend Details	•	_
II Reminders	- 🗍 08 Dec 2014 13:59		View Amendments		
Pathology & Radiology	Done By	Josephine Barker (SystmOne Administrator) @ Telehealth Hub - Loca	View For Date		
In Numeric Results		XaCFD Seen by psychologist			
Referrals (23)	XaCFD	Seen by psychologist (XaCFD)			
Record Sharing	Notes	Milly needing further intervention	Record Part of Shared Record	4	
🗍 New Journal	Done By	Mrs Dorothy Scarth (Specialist Nurse Practitioner) - Location: Home	Mark Event as Private	<	
Tabbed Journal	Entered By	Miss Nicola Burdett	Safeguarding Child Relev	ant	
📕 Read Code Journal (128)	Authorised By	Mrs Dorothy Scarth	Link to Referral	•	
Major Active Problems	Patient Contact	60 minutes	Link to Appointment or Vi	- i	
Minor Active Problems	Total Contact	60 minutes		51	
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Care Plans	Notes	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Problems	()	
< · · · · · · · · · · · · · · · · · · ·	Done By	Dr Andrew Daley (Consultant) - Location: Marie Curie Centre Outpatier	Mark in Error		
Search features		2 140 33 26 1	Table	• • 🗇 🗐 :	2
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4. Confidential notes. These are notes which **only the person recording them** can see. To record them, it's necessary for an individual staff member to be logged on and to add the necessary control button to their screen. This is a one-off procedure, but it is a bit fiddly. The sequence of screenshots below show how to do it:

Go to User menu > User Preferences:

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Click Amend Toolbar. Then select Toolbars under Navigation on the tree:



Click Amend Button Set:

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Patient Appointments Reporting Audit Se	tup Clinical Tools Workflow Hospital Overview	User System Help	
Q 🗹 🖌 関	Y User Preferences	23	
Search Task Discard Save	Enter text to search Search Clear	New Toolbar Copy Toolbar Amend Toolbar Delete Toolbar	
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Type confidential into search window, then 'Enter'. Double click on 'Confidential notes' and the padlock icon gets added to the buttons available:



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Quick Glance		Referrals										
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To enter confidential notes, click the padlock icon and type notes **directly** into the window which opens (see above). Importantly, it doesn't appear possible to mark notes 'confidential' retrospectively. It also doesn't appear possible to make them public again in the future.

Confidential notes permanently appear in red when the person recording them views the New Journal or Tabbed Journal (see above). They don't appear at all to anyone else. And strangely, they don't appear at all on our normal Palliative Care view, not even to the user who has recorded them.

If **the recording user** prints out the New Journal or Tabbed Journal, their confidential notes are included in the Word document which is generated – it would be easy to delete these rows if required. If anyone else prints the record, the confidential notes won't appear.

5. Attaching a Word document to a patient record.

Some services elsewhere have agreed that a group of their staff (eg psychologists) write notes in a password protected Word document which is then attached to the record. Access to the notes is then restricted to staff who are provided with the password.

To attach a Word document to a patient record, Right click on 'Record Attachments' and select 'Attach File'



Browse to the location of the file and click 'Select':

