# Get the most out of

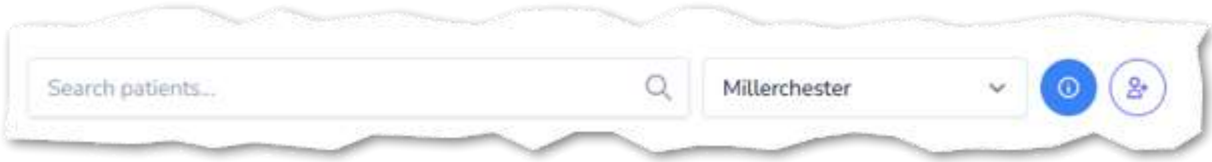
# Patient Record User Guide

# Contents

# Patients

## Patient Search

To search for a patient from the home screen, you can start typing into the search control shown below:

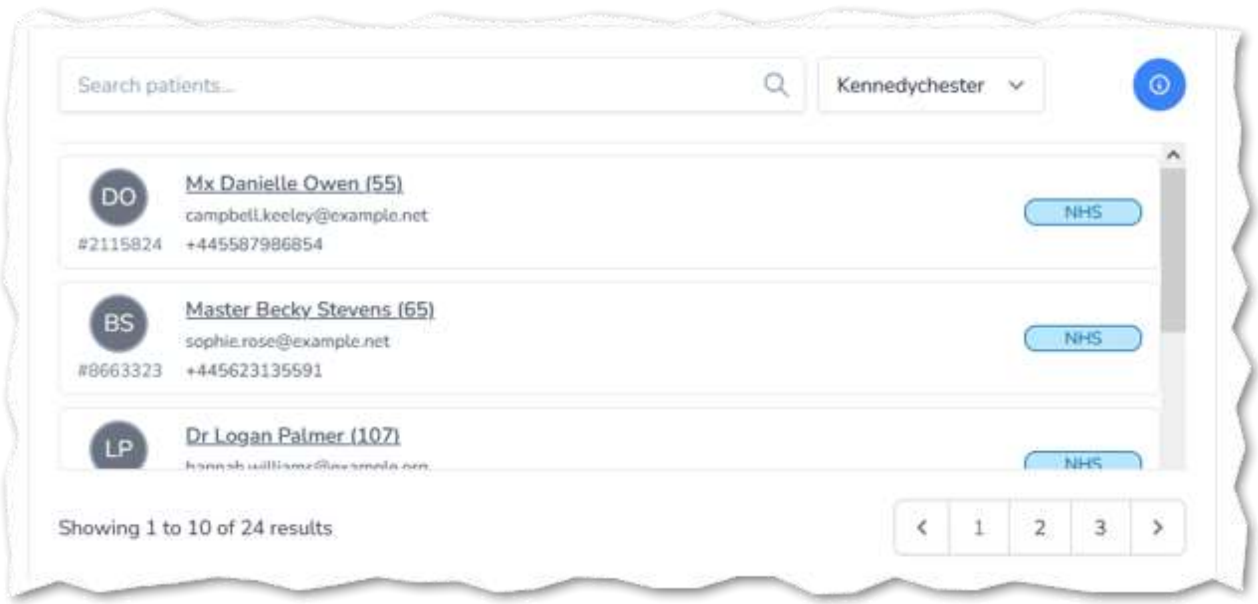



You can select a branch from the box on the right, to limit your results.

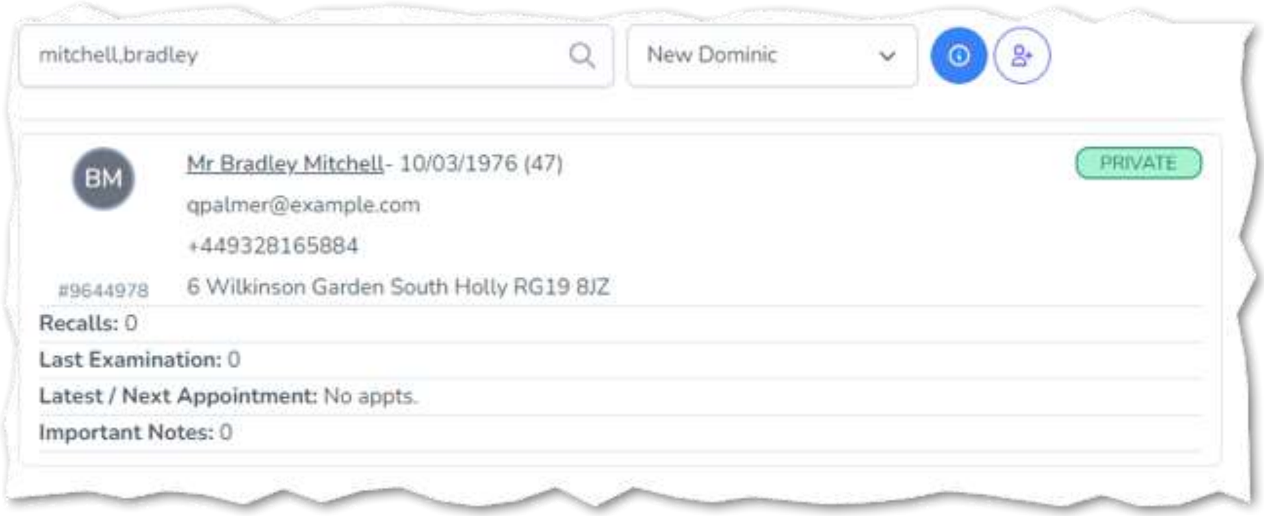
The branches available will change depending on your user permission to access records from other branches.

The number of results is refined once you begin typing.

When there are more than 10 results, the patients are displayed in a paginated table (a limited number per page) as below:

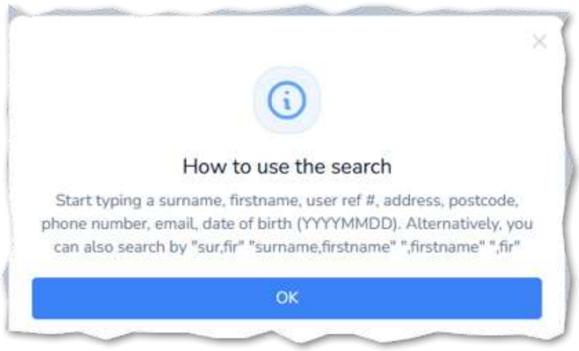



When there are 10 results or fewer, the display is updated so you can view more information per patient:




Clicking the " i " symbol. 

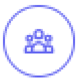
Displays a popup information message on the methods you can use to search for patients.




When your search results are displayed, you can click the patient's name or initials to view their record.

Clicking the patient + symbol. 

Provides a shortcut to create a new patient record. See the create new patient section for more details.

Click on  to search all patients

The Active Patients section of the main menu is used for quickly accessing recently used patients.

When you access a patient record, they are added to your Active Patients list.

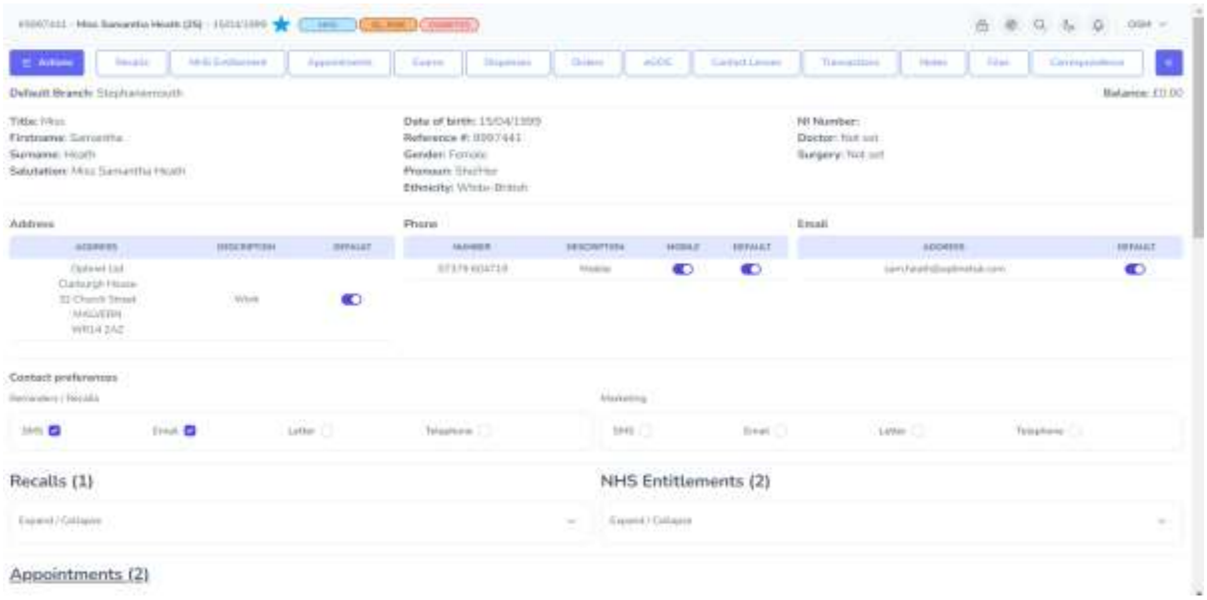
You can go to a patient record from here by clicking on the Patient’s name,

You can remove the patient from your active list by clicking the X icon next to their name.

## Patient Record

The patient record stores the contact details for each patient. You are also able to see a summary of their activity within the practice.

There are Tabs across the top of the record that you can use to jump down the page to see a summary of the corresponding section.




Each section within the Patient record will be expanded or collapsed automatically when you click its tab, or it can be expanded or collapsed manually by clicking the Right arrow within its summary tab.

## Actions

The Actions menu on the patient record allows to you carry out certain functions relating to the patient record – it can be accessed by clicking ‘Actions’ to expand the menu.


## Edit Patient

This will make all fields within the patient record accessible. Fields are free text unless there is a symbol within the field, such as or These when click on will present additional fields to add further data into.

### *Addresses*

Postcode look up is available here by clicking on the blue circle Enter the postcode and click Search.

The results for that postcode will be available for selection. Simply click on the correct address for the patient and then Save.


Multiple addresses can be added to the patient record in this way by clicking on the

### *Telephone Numbers and Email Addresses*

Add multiple telephone numbers and or Email addresses by again clicking on the beneath the relevant heading. The phone numbers can be given a description in order to differentiate between each number added.

### *Contact Preferences and Marketing*

Click in the relevant box to indicate which is preferred by the patient.

*Stars*

These can be selected by clicking in the relevant box. These **do not** have to be labelled and but if that is required then go to Setup and label the colour appropriately.

Once all the patient details have been completed click save at the bottom of the window.


## eSignature

The patient signature can be captured here and subsequently used on eGOS claims later if they are happy to have their signature stored (For 12 hours maximum)

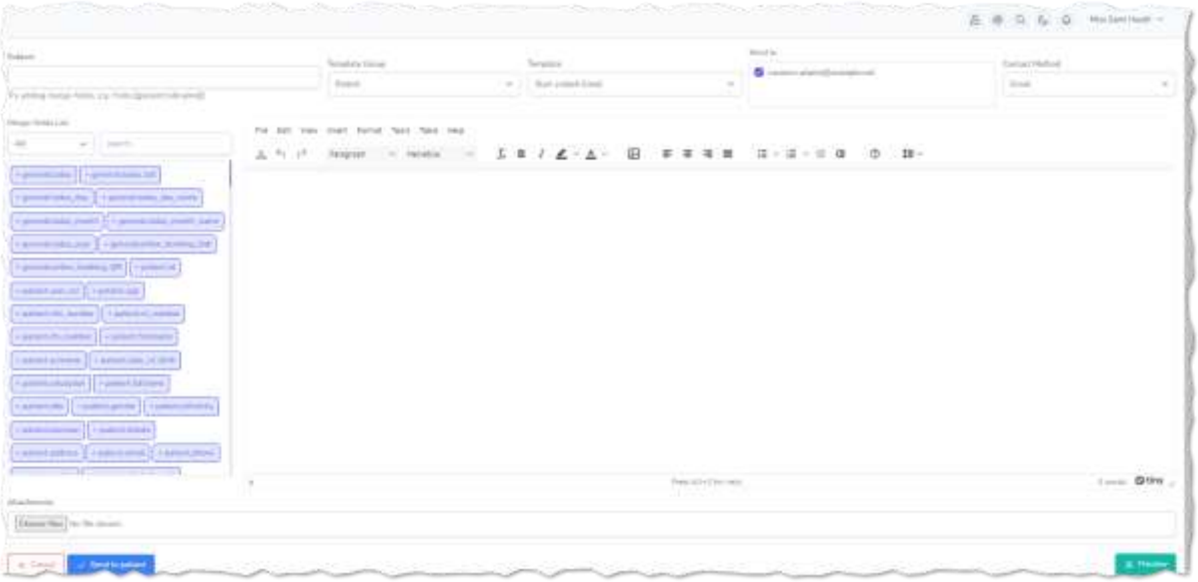
## Send SMS

SMS can be sent out individually from within the patient record. If there are templates setup, select the one which is appropriate. Alternatively type out the text message and include any keywords from the list to the left. These will be pulled into the message from the patient record when sent. A preview can be accessed prior to sending the message by clicking on Preview which is at the bottom right of the screen.

Click on **Send to Patient** when the text is ready to go.

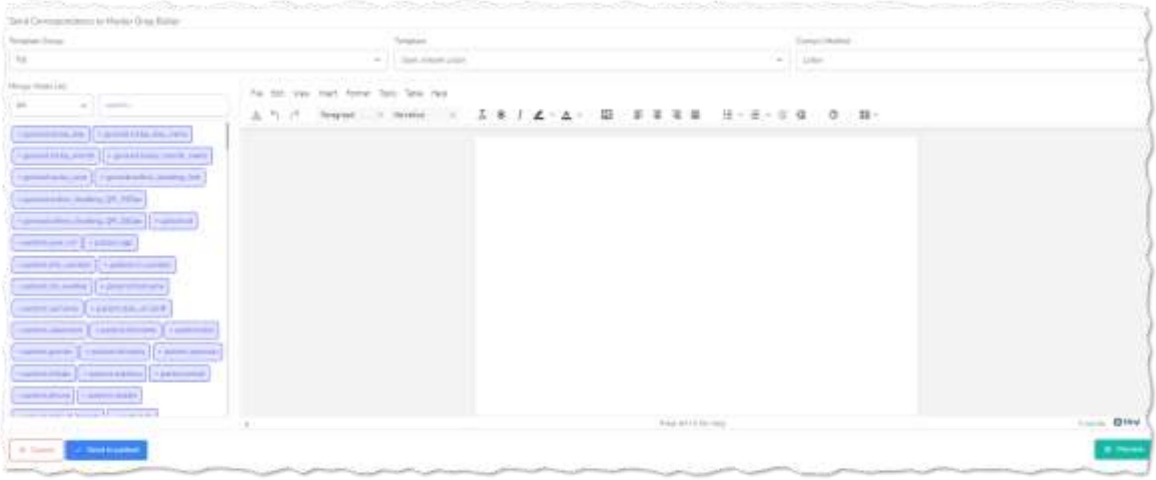
## Send Email

Enter a subject heading, a template if required and if there are a number of different email addresses on the patient record, simply click the one you want to send it to. Write the email in the same way as for the SMS by including any keyword and free text into the body of the message. Preview is in the bottom right of the window, when happy with the massage, click on **Send to Patient**



## Send Letter

Templates can also be attached if setup here too.  Select the appropriate Template group and template.  Together with amending or adding to any template selected, it is possible to type out a letter and include field names if required too.



## NHS Entitlements

You can assign NHS Entitlements to a patient from their record by toggling the switch on the entitlement when the patient is in edit mode.

Entitlements can be assigned during an exam or by editing the Patient Record. They are then displayed in the table on the patient record.


# Recalls

On the Patient Record Screen, the Recalls section displays all recalls that are due for the patient.


In the table, there is the **Recall** category, the defined period, and the calculated due date. The colour of the due date will change, from Green, to Yellow, to Red, as the date approaches and is passed.

## Appointments

The appointment summary display how many appointments the patient has had (or is due to have)


It also displays the date and time of the next/last appointment type along with the date and time so you can see if/when they are due into the practice.

Also on screen is a counter for Failed or Cancelled appointments for this patient.

Expanding the appointments control displays more details of all the patient's appointments.


Appointments will be displayed in tiles, with the most recent first.

The strip of colour across the top of each appointment booked denotes the appointment reason to easily identify the type of appointment that is booked.

Appointments will appear within two sections here, upcoming appointments and Past Appointments.

## Examinations

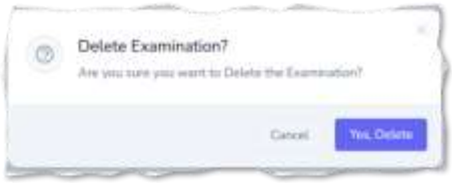
Here you can see a history of examinations for the current patient. View historic examinations by clicking on the arrow on the right.


You can create a new examination by using the plus icon.

Each previous exam is listed with a summary of the Final Rx, the optometrist and the date and time.

It is also possible to edit and delete an exam from here using the Edit and Delete buttons, but this is restricted by your user permissions, so is not available for all users.


When choosing to delete an exam, you are prompted to confirm you want to continue.




## Notes

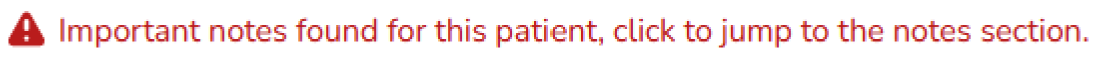
Patient notes are displayed in tiles on the patient record. In active or system notes can be hidden to keep the active notes visible and easier to find.  This can be done by a button on the top right of the notes screen.


If a note has been flagged to stand out, then it will have the coloured line above it as per the screenshot above.  There is also a triangle with and exclamation mark noting it's a flagged message too.

You can toggle the 'Flag' option to denote that this is an important note.

You can also mark the note as 'Inactive' if you no longer wish it to be on the patient record.

If you have Flagged notes, a reminder is displayed at the top of the patient record. This reminder also acts as a clickable link so you can jump straight to view the note.



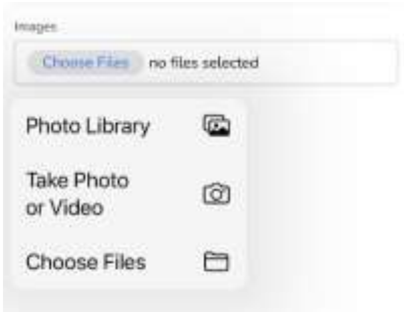

Flagged notes, are displayed with a warning triangle on their tile to denote their importance.

# Files

Documents or pictures can be attached to the patient record from the **Files** tab. This can be done in two ways either by clicking on **Choose Files** or by clicking on **external upload**. External Upload will show a QR Code. When the QR Code is scanned on a mobile phone or tablet, it will allow any photographs or documents stored on that device to be uploaded directly to the patient record.

Click on File and select how the upload is going to be done.


When selecting the QR Code click on the Yellow link displayed.




Then select the photo or file from the options displayed.

When the document or photograph is chosen it will automatically appear in files within NOVA

Viewing what has been

Uploaded.

Click on **Files**.


## Summary

From the patient record screen access to all parts of the patient journey is available. The buttons across the top will give access to these areas, as will scrolling down the screen within the record. There are separate guides covering all these areas.