

STANDARD OPERATING PROCEDURE DOCUMENT (SOP)

Title	Special Patient Note (SPN) / Anticipatory Care Plan (ACP) notifications	Doc. No.	OP104
Scope	Operational / Administrative Teams		
Purpose	To have a robust process in place that ensures accurate up to date information and instructions received securely in relation to a patient are in one place, easily accessible and clear to read without duplications. Also that any previous information is removed from the system when no longer applicable.		
Guidelines	Receiving the note Implementing the Informational Governance regulations regarding the patient's information means Primary Care 24 will only accept notifications via NHS email account on the correct template with a numerical expiry date. Inputting of the note Every effort must be made to match up the note with any existing patient record and not create a duplicate record.		
PROCEDURE		RESPONSIBILITY	
1.	Shift Managers are responsible for the daily inputting of Special Patient Notes onto the Adastra system. Service Managers have access to the NHS email and are trained on the inputting of special patient notes and therefore can be referred to in the case of staff needing advice or guidance.	Primary Care 24 Shift Manager / Service Manager	
2.	Receiving the Special Patient Notes: The requirement from 3 rd March 2014 is that GP surgeries now send the special patient notifications via the NHS email (uc24spn@nhs.net) account using the new template with a numerical expiry date. Access to the NHS email account, remember to keep pressing F5 to refresh the screen as this is not automatic. If a surgery hasn't used the new template, email the surgery back using the NHS account and attach a copy of the new template. You must advise that on this occasion, the note	Primary Care 24 Shift Manager	

	will be input onto the system, however any further notes received will have to be provided on the correct template. The template is located electronically on the shared drive S: PC24 official templates/SPN template. Do not fax any patient details or templates to the surgery as this is an IG breach. When emailing the surgery back using the uc24spn.nhs.net account; you must type in your name and contact number so you can be contacted directly if the surgery has any queries. If the surgery hasn't put a numerical expiry date, you must contact the practice and request for this to be provided. The special patient note can be inputted with a default of 6 months – inform the surgery of this. The password on the NHS email account will periodically run out and it is the responsibility of the IT team to ensure all staff are informed of an updated password. Once the SPN has been inputted into AdastrA, move the email to “completed SPN's” section of the email inbox.	
3.	Rejecting a Notification All SPNs should be typed, if the special patient note received is handwritten these should be rejected. Email the surgery stating why the note is not accepted and attach a new template if necessary. Make of a note of the special patient note being returned to the surgery within the special patient note log book. The special patient note book can be found within the shift managers draws. Move the email with the rejected special patient note to “queried special patient notes” section of the email inbox.	Primary Care 24 Shift Manager
4.	Identifying the correct patient record on AdastrA It is essential to avoid creating duplicate patient records on AdastrA. Ensure that the patient has one patient record before entering a special patient note. Search for the patient in patient search (database options) by date of birth and first	Primary Care 24 Shift Manager

	three letters of both names. In cases where previous encounters have had an incorrect date of birth entered, please amend using the most up to date information. If at this stage you cannot find the patient on the system go straight to point 5. If found more than one patient but the record shows a different address, access Open Exeter to search for the patient to confirm whether each record relates to the same patient (this will ensure that if the patient calls in the PC24 in the future clinicians can see all past consultations for the patient) or check to see whether the NHS number on the Adastra record is the same as the NHS number on the special patient note. Once you are sure which record relates to the patient, you amalgamate the records using “patient maintenance” Within Adastra select Note Edit (Patient maintenance) search for the patient record to attach the special patient note to. If there are no previous patient records available for the patient select “New patient” and use the demographics from the special patient note to enter the patient details. Ensure the following demographics are entered: names, gender, address, postcode, date of birth, own GP surgery and contact telephone number for patient – if provided	
5.	Read and assess : One Patient One Note Check in ‘note edit’ to see if there are existing notes on the system if there are OBSOLETE. Obsolete notes have the ‘obsolete’ box ticked and as such they are not visible to NHS111/Clinicians/Operational staff so don’t amend these notes. If there is an existing active note (not obsolete) then you need to review the information on screen and read the new note, assess what information is needed and also what is the up-to-date information. Then assess how best to reflect this information in a note. Ensure you don’t have contradicting information on the note. Edit obsolete or re-type information from previous notes to ensure there is one note that is up-to-date and relevant.	Primary Care 24 Shift Manager

6.	<u>Inputting the note:</u> Working through the SPN and tick each section when completed, check the demographics and own surgery by clicking the Patient Details tab and amend the demographics in this screen (this is effectively the same as changing the demographics in 'patient edit'). Sign off the note at the end by typing your name and the date e.g. Input: M Jones 16.4.14 Do not use the Questions tab to access pre-defined templates.	Primary Care 24 Shift Manager
7.	Enter the "Expiry Date" (called the review Date on the Adastra system) This cannot be longer than one year from the date of inputting the special patient note. If there is no date stated on the special patient note or the GP/surgery has written "indefinite" or "until death" contact the surgery to ask for an expiry date, escalate to a Service Manager if there are any problems encountered. The boxes marked: User Can Change Selection, Initially selected and Share With External Agencies will be ticked by default – Do not un-tick these boxes. The box marked Obsolete will be un-ticked by default – do not tick this box unless the note is no longer relevant. Once you have entered the information, checked the demographics for accuracy and entered/checked the Review Date, click the Update button.	Primary Care 24 Shift Manager
8.	Write an entry in the special patient log book. The paper copy of the special patient note is not needed as the information is recorded electronically in the email inbox and the patient record on Adastra. Dispose of the paper copy in Confidential shredding bin.	Primary Care 24 Shift Manager
9.	If a surgery rings the service wanting to pass a verbal special patient note because the staff have no access to email and insist they cannot provide a typed SPN but need to pass the information on as a matter of patient safety, then in this	Primary Care 24 Shift Manager

	instance a <u>Service Manager or Shift Manager only</u> can take a verbal note (filling in an special patient note template). They will then inform the surgery this will only be active until the next working day when the correct template should be emailed.	
10.	Verification The special patient note needs to have the patient's NHS number verified via a PDS search. Go into Aداstra, patient edit (patient Maintenance) and type in the patient's name, right click and select "Patient Amalgamation" This automatically take you to the PDS screen. Follow the referral coordinator PDS process of un-ticking all the boxes apart from the NHS number on the PDS screen. If there are any records to add then select those and click ADD and then select "Amalgamate"	Primary Care 24 Shift Manager
11.	A review of the expired notes will be undertaken on a weekly basis by the BI team.	Primary Care 24 BI Team

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Title		Special Patient Note (SPN) / Anticipatory Care Plan (ACP) notifications		Doc. No.	OP104
Version			v8		
Supersedes			v7		
Approving Managers/Committee			Deputy Director of Urgent Care		
Date Ratified			September 2007 (originally)		
Department of Originator			Integrated Urgent Care		
Responsible Executive Director			Director of Service Delivery		
Responsible Manager/Support			Deputy Director of Urgent Care		
Date Issued			September 2007 (originally)		
Next Review Date			January 2021		
Target Audience			Service Managers and Shift Managers.		
Version	Date	Control Reason		Accountable Person for this Version	
v1-6	Sept 07 - Mar 12	Reviewed and update		Various	
v7	May 2014	Re-written due to change in Procedure		IM&T Manager	
v8	January 2020	Reviewed and update		Service Manager	
Reference documents		Electronic Locations		Locations for Hard Copies	
		Primary Care 24 Intranet / Corporate Policies/ Current SOPS/		Standard Operating Procedures File in the Call Centre.	
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