

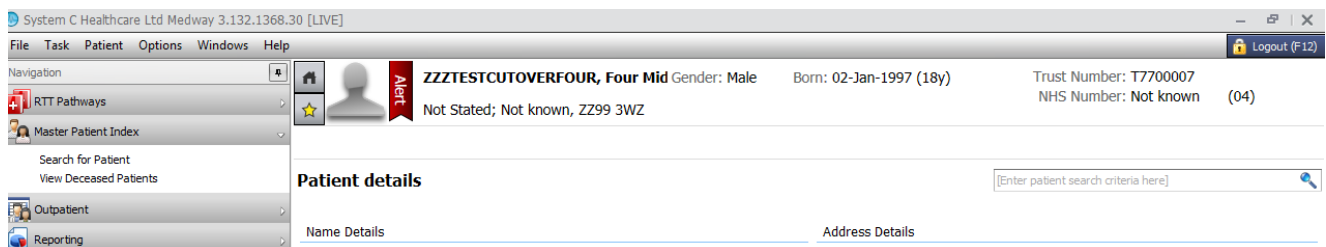


Proforma

Transition

Select your patient within Medway so that their demographics appear at the top of the screen

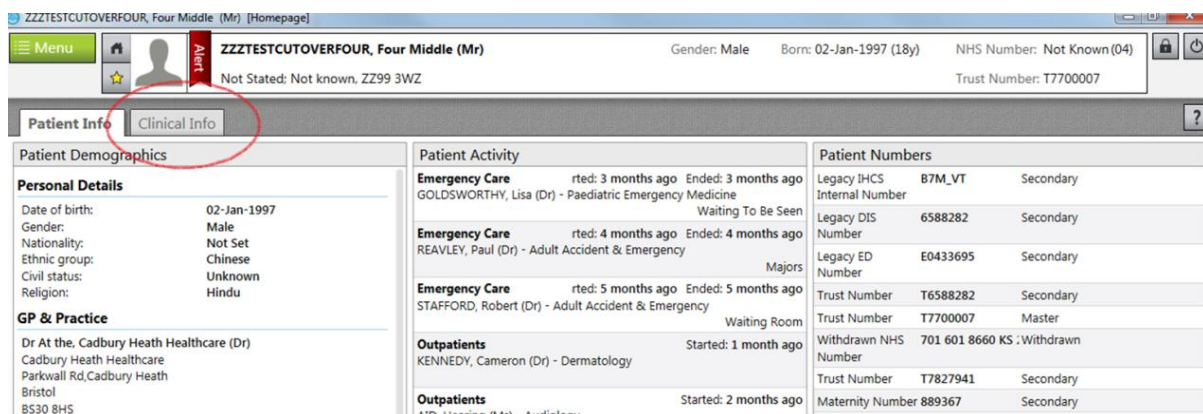
Either by searching in the 'Master patient index' or an Outpatient clinic list, or an IP ward list











This will open the patient's homepage

If your permissions allow you to view the 'clinical info' tab you can add a proforma by selecting this tab

Select the 'clinical info' tab and you will see a 'Proforma selection' section/widget



Proforma Selection		
	Osteoporosis CNS ANDERSON, Robert (Mr), Colposcopy: 20-Apr-2012	20-Apr-2012 09:00 ▶
	Osteoporosis CNS ANDERSON, Robert (Mr), Colposcopy: 20-Apr-2012	20-Apr-2012 09:00 ▶
	Osteoporosis CNS POPE, Ian (Mr), Colorectal Surgery: 18-Apr-2012	19-Apr-2012 08:30 ▶
	Osteoporosis CNS ANDERSON, Robert (Mr), Colposcopy: 20-Apr-2012	20-Apr-2012 09:00 ▶
	Osteoporosis CNS ANDERSON, Robert (Mr), Colposcopy: 20-Apr-2012	20-Apr-2012 09:00 ▶
	Osteoporosis CNS ANDERSON, Robert (Mr), Colposcopy: 20-Apr-2012	20-Apr-2012 09:00 ▶
	Hepatology Radiology Meeting	20-Apr-2012 09:00 ▶
 Merged		View All Add Proforma

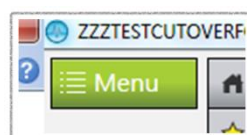
Select 'Add proforma' to add a new proforma to the patient

To EDIT an existing proforma from this screen select the arrow

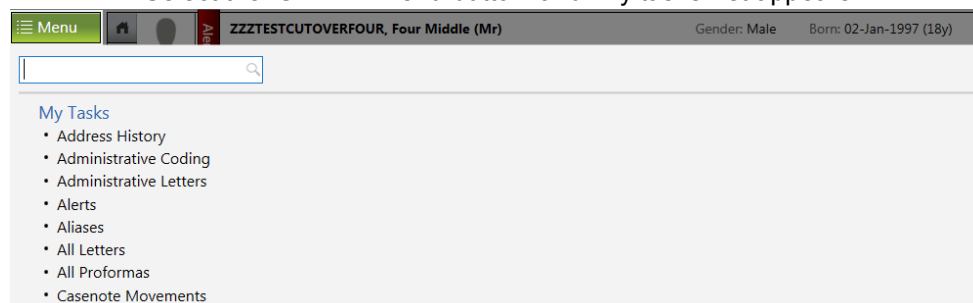


If you select 'view all' you will open the patients 'Proforma Home page and will see a full list of proformas added to the selected patient and options for each.

If you do not have permission to see the 'clinical info' tab you can access proforma via the GREEN 'Menu button'





Select the 'GREEN Menu button' and 'My tasks' list appears



Select 'All proformas' and the patient's proforma home page opens

ZZZTESTCUTOVERFOUR, Four Middle (Mr) [Patient Proformas]

Menu  **ZZZTESTCUTOVERFOUR, Four Middle (Mr)** Gender: Male Born: 02-Jan-1997 (18y) NHS Number: Not Known (04) Trust Number: T7700007

Alert  Not Stated: Not known, ZZ99 3WZ

Patient Proformas

Drag a column header here to group by that column

Proforma Name	Specialty	Entity Type	Entity Date	Clinical Date	Added	Updated	Owner
Osteoporosis CNS		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	01-Jul-2015 13:48	03-Jul-2015 13:30	
Osteoporosis CNS		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	03-Jul-2015 12:56	03-Jul-2015 12:56	
Osteoporosis CNS		OPA	18-Apr-2012 00:00	19-Apr-2012 08:30	02-Jul-2015 10:07	03-Jul-2015 12:54	
Osteoporosis CNS		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	02-Jul-2015 13:42	03-Jul-2015 12:54	
Osteoporosis CNS		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	02-Jul-2015 12:12	03-Jul-2015 12:53	
Osteoporosis CNS		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	03-Jul-2015 10:52	03-Jul-2015 12:50	
Hepatology Radiol...		OPA	20-Apr-2012 00:00	20-Apr-2012 09:00	24-Apr-2015 13:45	24-Apr-2015 14:45	
Private Patients PA...		PAT	02-Jan-1997 00:00	02-May-2013 15:55	02-May-2013 15:55	02-May-2013 15:55	
Adult Triage Details	Adult Accident & E...	Tri	27-Nov-2012 10:54	27-Nov-2012 10:56	27-Nov-2012 10:56	27-Nov-2012 10:57	

Total Count: 9

Merged


Add Proforma Show Excluded Close


This page displays all the proformas that have been added to the selected patient.

You can view, edit or print (if a proforma has a template setup)

To add a new proforma select 'Add proforma'

ZZZTESTCUTOVERFOUR, Four Middle (Mr) [Add Proforma > Proforma Select]

Menu  **ZZZTESTCUTOVERFOUR, Four Middle (Mr)** Gender: Male Born: 02-Jan-1997 (18y) NHS Number: Not Known (04) Trust Number: T7700007

Alert  Not Stated: Not known, ZZ99 3WZ

Add Proforma **Proforma Template Select** Select Show Template Start Page Show Clinical Form

Proforma Select

Search

Favourites

Drag a column header here to group by that column

Name	Speciality	Owner	Proforma Type
Osteoporosis CNS			Proforma
Paediatric Hypospadias/ Tonsillec...			Proforma
Paediatric Mortality			Proforma
PHS			Proforma
Surgical and Trauma Assessment			Proforma

Select the 'search' tab

Choose the proforma you require and click the 'select' button that appears

You are required to link the proforma to a 'care event'.

Depending on how the proforma you have chosen is linked you may need to select the relevant Outpatient appointment or IP spell.

If the proforma you are adding is 'Patient linked' the only option available to select will be the patients name and date of birth details displaying at the event date


In order to start the new 'Diabetic Annual Review' proforma you must select one of the following care events

Event Date	Event Type	Speciality
02-Jan-1997 00:00	Patient	

Once you have selected a 'care event' select 'next'

Depending of the proforma you have selected you may be presented with a 'Clinical Date' screen

Template Start screen

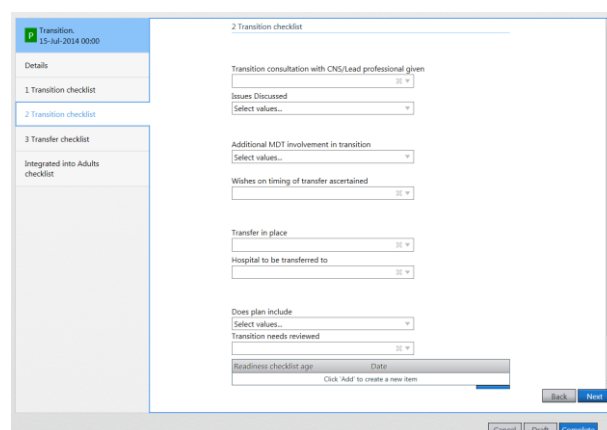
 Osteoporosis CNS
19-Apr-2012 08:30

Clinical Date *
19-Apr-2012 08:30

The 'clinical date' is intended to represent as closely as possible the date and time the clinical information was actually captured. Only amend this date if the clinical information you are about to record has not been captured in real-time i.e. it was captured in the past.

If you see this screen you are NOT required to change this date, you will only need to select the '**next**' button on the bottom of the screen

The proforma will now open and you will be able to complete the form



The Transition proforma starts with 3 questions that are required to be completed before you can continue with the rest of the proforma

To select a 'Transition lead' enter a surname into the box and press enter/return, a list of available names will appear select the correct one. (The search is similar to Outlook address book and you can narrow down the search by adding a ';' and initial.... e.g. Smith, J (a space is required between the comma and the initial letter)

Complete the necessary details and Select the BLUE 'next' button to carry on through the pages of the proforma

You will have to fill out any mandatory fields before the 'Complete' button is available

A RED * on the page tabs on the left displays where the mandatory fields are located

And the 'mandatory' fields also display a RED *

Once you have finished select 'Complete'