



## 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

System C Healthcare Ltd Medway 3.132.1368.30 [LIVE]

File Task Patient Options Windows Help

Navigation

- RTT Pathways
- Master Patient Index
- Search for Patient
- View Deceased Patients
- Outpatient
- Reporting

ZZZTESTCUTOVERFOUR, Four Mid Gender: Male Born: 02-Jan-1997 (18y) Trust Number: T7700007  
Not Stated; Not known, ZZ99 3WZ NHS Number: Not known (04)

Logout (F12)

Patient details [Enter patient search criteria here]

Name Details Address Details

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

ZZZTESTCUTOVERFOUR, Four Middle (Mr) [Homepage]

Menu

ZZZTESTCUTOVERFOUR, Four Middle (Mr) Gender: Male Born: 02-Jan-1997 (18y) NHS Number: Not Known (04)  
Not Stated; Not known, ZZ99 3WZ Trust Number: T7700007

Patient Info Clinical Info

Patient Demographics

**Personal Details**

Date of birth: 02-Jan-1997  
Gender: Male  
Nationality: Not Set  
Ethnic group: Chinese  
Civil status: Unknown  
Religion: Hindu

**GP & Practice**

Dr At the, Cadbury Heath Healthcare (Dr)  
Cadbury Heath Healthcare  
Parkwall Rd, Cadbury Heath  
Bristol  
BS30 8HS

**Patient Activity**

**Emergency Care** rted: 3 months ago Ended: 3 months ago  
GOLDSWORTHY, Lisa (Dr) - Paediatric Emergency Medicine  
Waiting To Be Seen

**Emergency Care** rted: 4 months ago Ended: 4 months ago  
REAVLEY, Paul (Dr) - Adult Accident & Emergency  
Majors

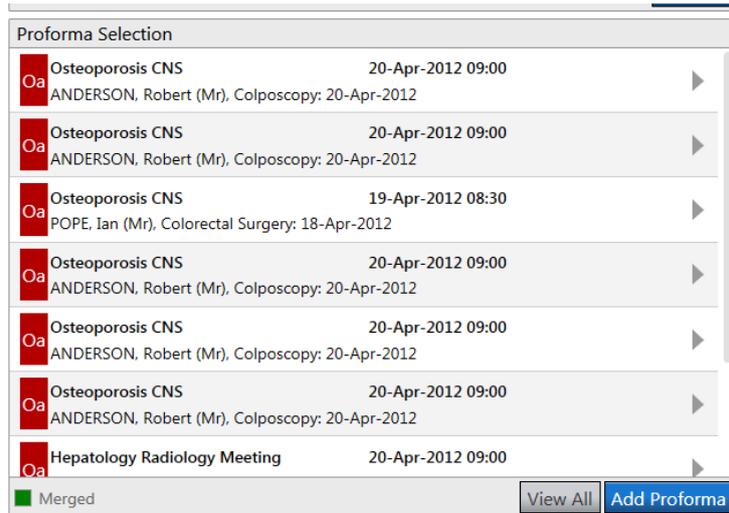
**Emergency Care** rted: 5 months ago Ended: 5 months ago  
STAFFORD, Robert (Dr) - Adult Accident & Emergency  
Waiting Room

**Outpatients** Started: 1 month ago  
KENNEDY, Cameron (Dr) - Dermatology

**Outpatients** Started: 2 months ago  
AID, Hearing (Ms) - Audiology

**Patient Numbers**

Legacy IHCS Internal Number	B7M_VT	Secondary
Legacy DIS Number	6588282	Secondary
Legacy ED Number	E0433695	Secondary
Trust Number	T6588282	Secondary
Trust Number	T7700007	Master
Withdrawn NHS Number	701 601 8660 KS	Withdrawn
Trust Number	T7827941	Secondary
Maternity Number	889367	Secondary



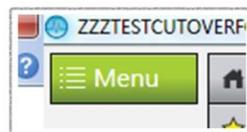
Select 'Add proforma' to add a new proforma to the patient

To EDIT an existing proforma from this screen select the arrow

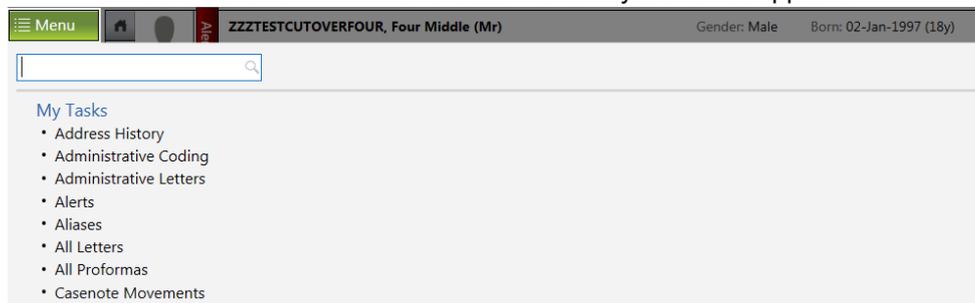


If you select 'view all' you will open the patients 'Proforma Home page and will see a full list of proformas added to the selected patient and options for each.

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  
Not Stated: Not known, ZZ99 3WZ

**Patient Proformas**

Drag a column header here to group by that column

Proforma Name	Speciality	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  
Not Stated: Not known, ZZ99 3WZ

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

**Proforma Select**

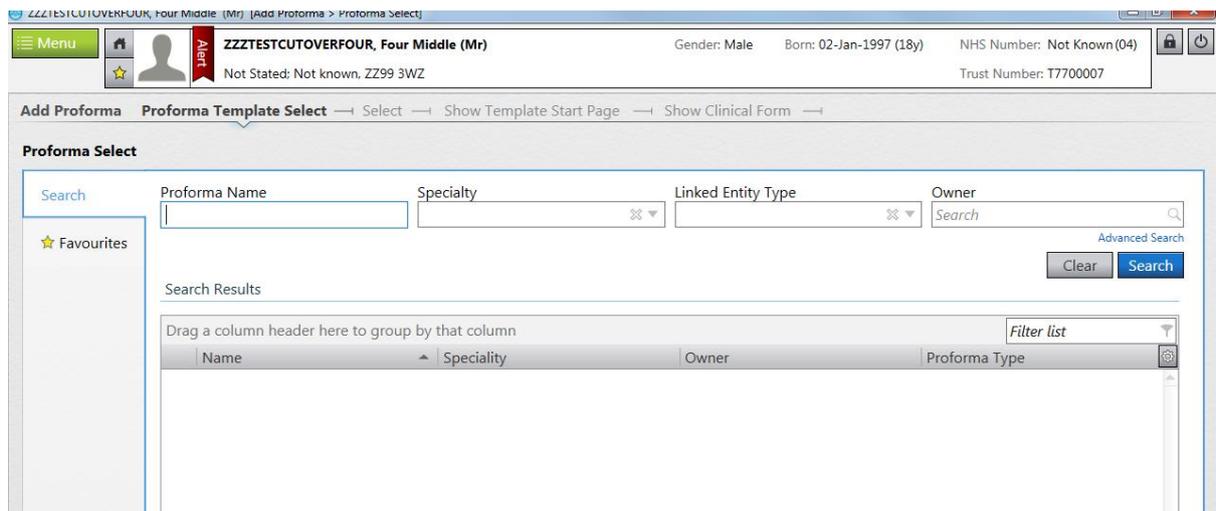
Search

Favourites

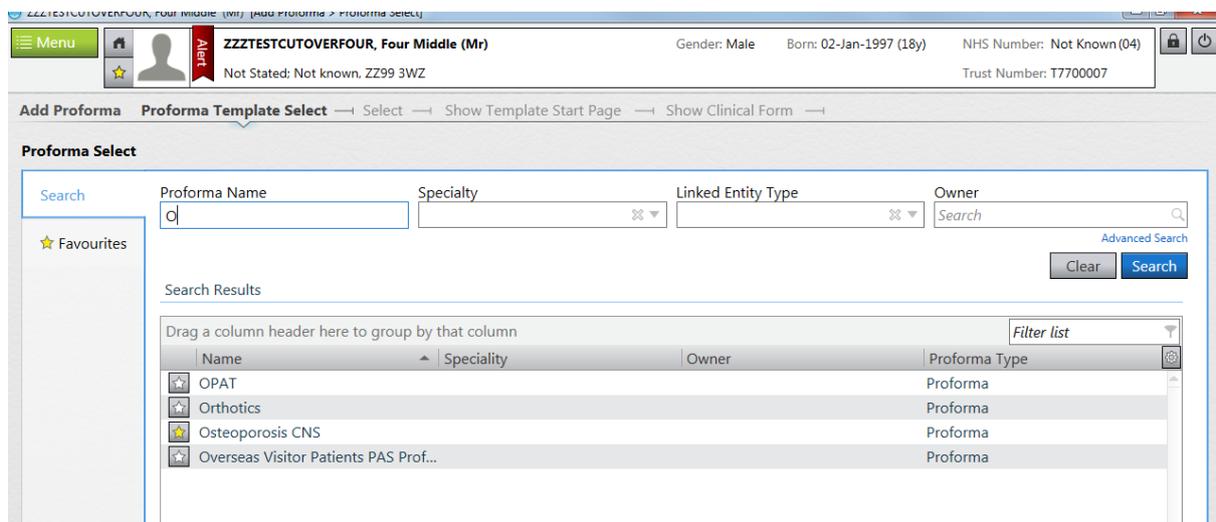
Drag a column header here to group by that column

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

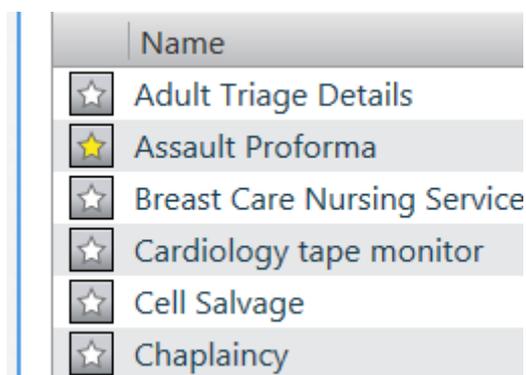
Select the 'search' tab



Click the BLUE 'search' button to list all available proformas, or type the name (or first few letters) of the proforma you require into the 'Proforma Name' field and click the BLUE 'search' button



If you click the STAR next to the proforma name it will 'favourite' the proforma and you will not be required to search for this proforma again on the proforma home page next time you are adding a proforma



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 even

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**

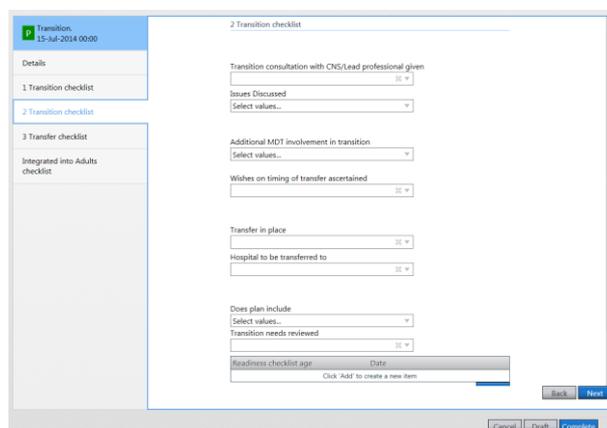
 Osteoporosis CNS  
19-Apr-2012 08:30

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'