NECS Clinical Systems Specialist Team

SystmOne - Consultation Guide

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Starting a Consultation

1. A consultation can be recorded using one of the following methods:

   a. From the **Appointment Rota**, right click on a patient who has arrived for their appointment and select **Consultation.** The patient record will open in consultation mode.
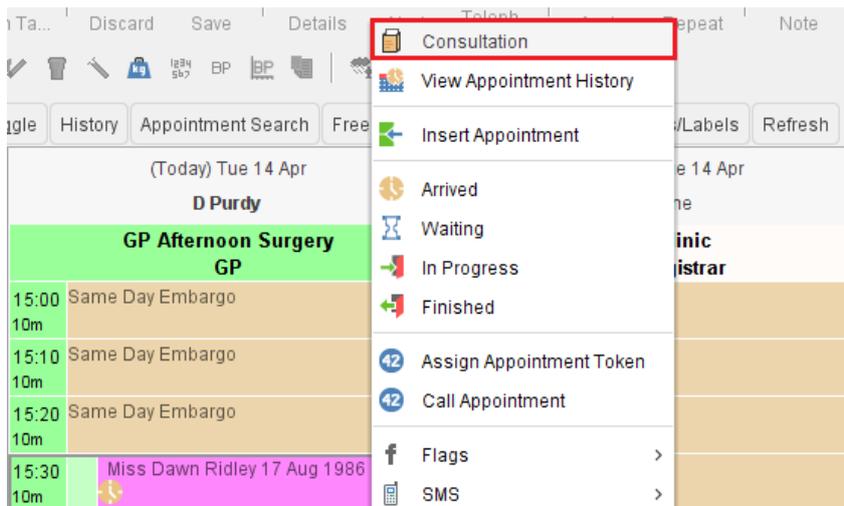
   b. Click **Visits** from your home page, right click on a patient you have completed a home visit for, select **Consultation**. The patient record will open in consultation mode.
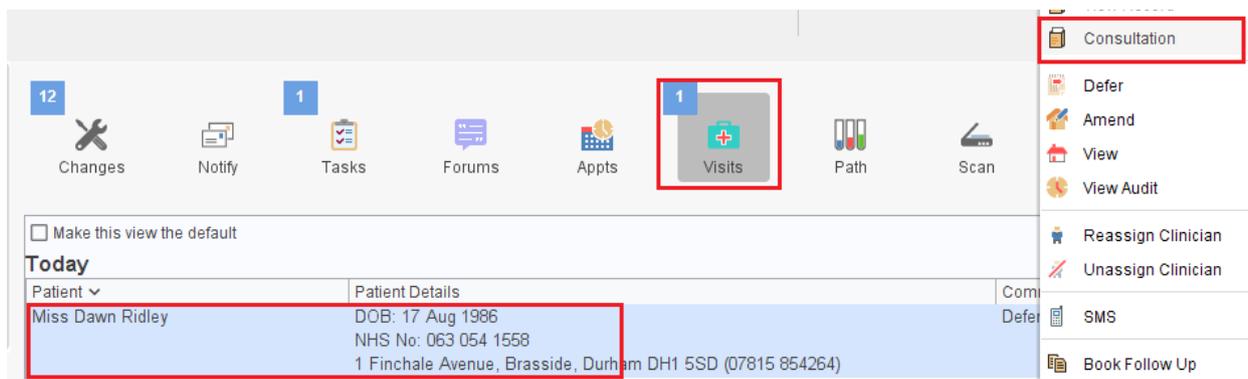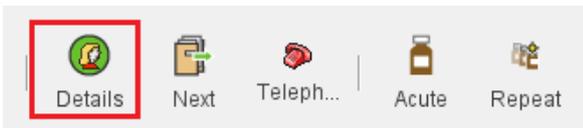

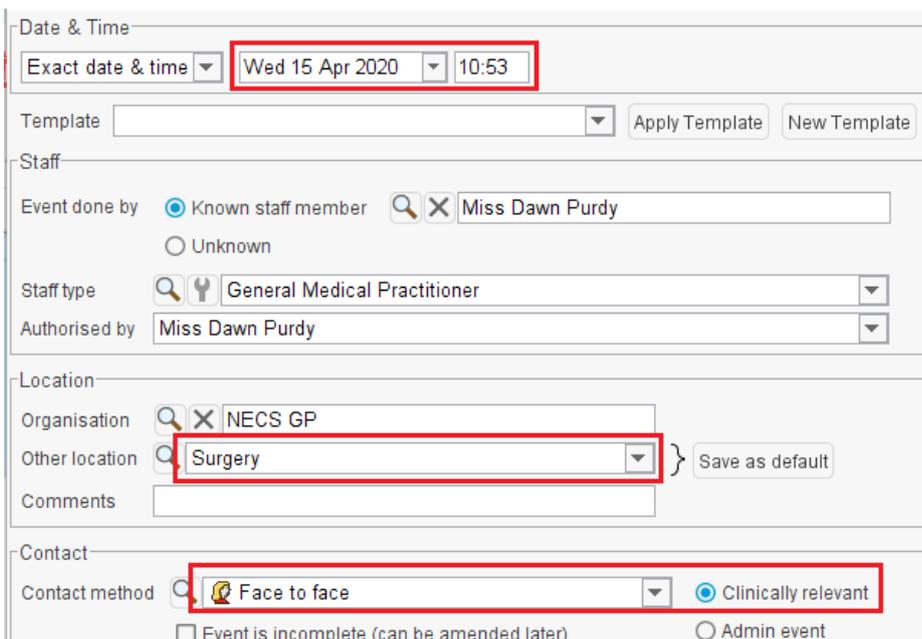   c. Retrieve a patient record, click **Start Consultation**.
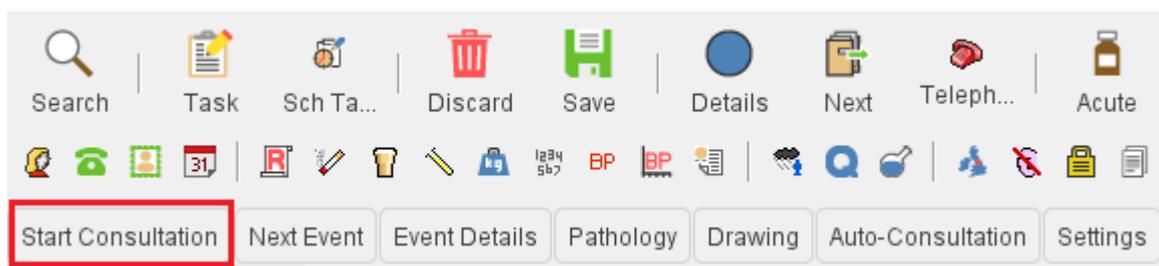
Event Details

1. If the consultation has been started from either the appointment rota or from a **visit**, the event details will automatically update.


2. The Following information will be populated:

    a. The date and time (current date and time)
    b. Location will default to either Surgery or Home
    c. Contact Method will default to Face to Face
    d. Clinically Relevant

3. Click **Details** from the toolbar to make any necessary changes for example change the date/time for a home visit.

4. When retrieving a patient record the details button will default as an **Admin event**.
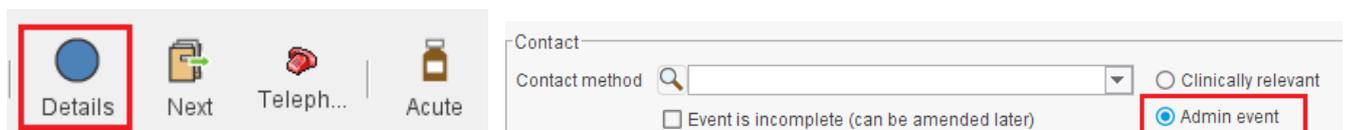
5. Clicking **Start Consultation** will change this icon to a face to face consultation. Click **Details** to change any necessary details for example record a Telephone Consultation.

6. Click **Date and time** drop down boxes to back date the consultation.

7. Click **Contact method** drop down to select the method of the consultation, e.g. Telephone, Email, Letter, depending on what your practice has chosen to add to this list.

8. Ensure all consultations are recorded as **Clinically Relevant.**

9. Click **Ok** when the Event Details have been completed.
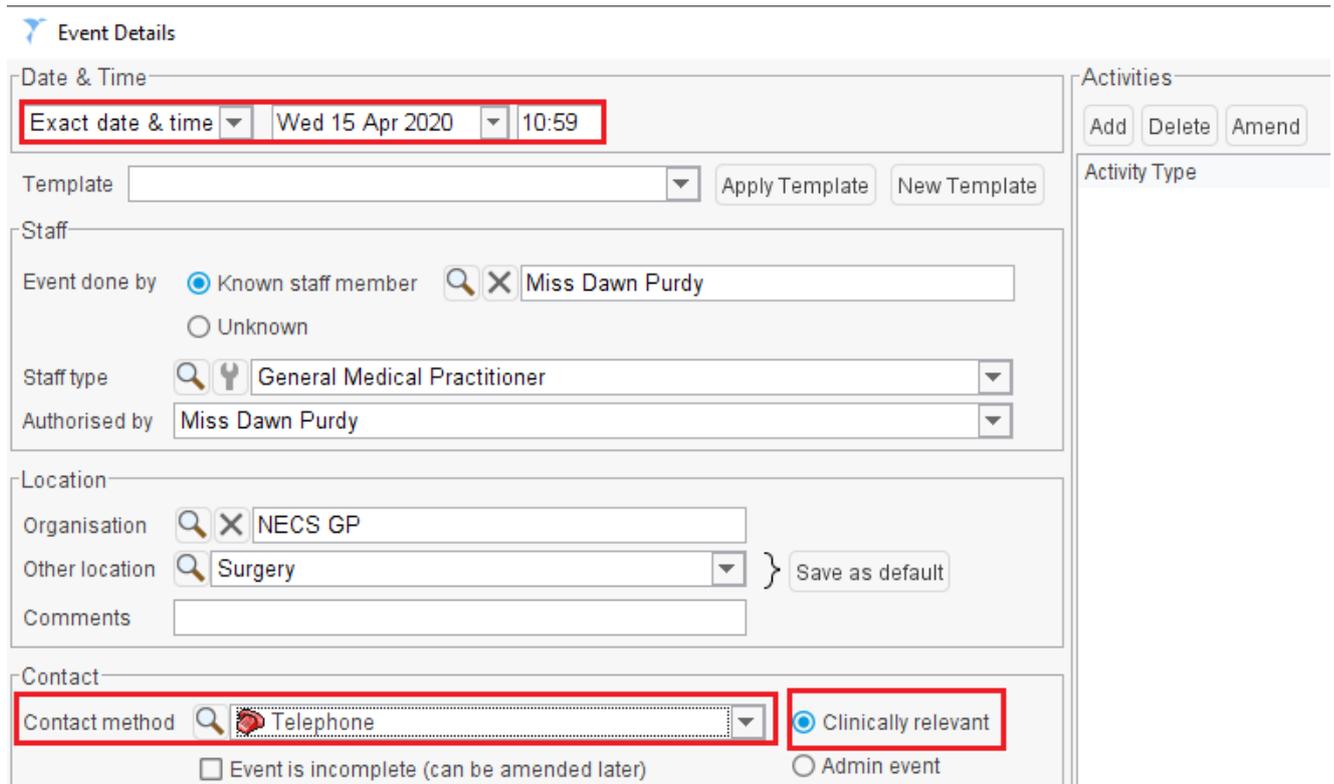
Recording a Consultation

1. Enter text into the consultation fields as required. As you type, the system will suggest **Read Codes**. If you wish to code, click on the appropriate code in the list or press **Enter** when the correct code is highlighted (this will display as green font when recorded). Alternatively continue to free text without selecting a code.

   Note: This can be switched off in User Preferences – Patient Record - Consultation.
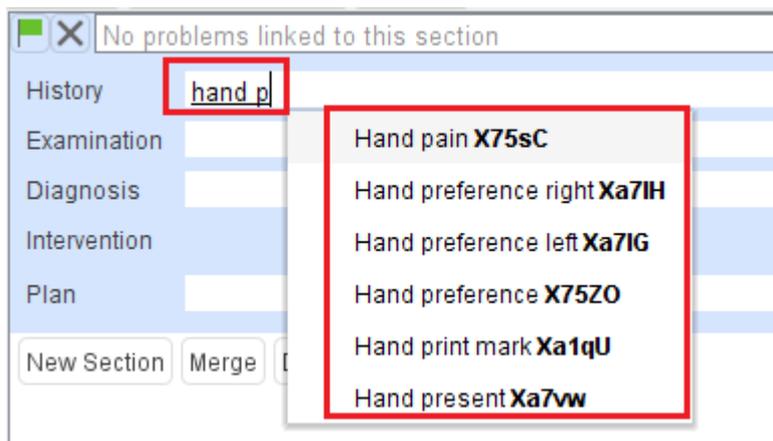

2. If a **Diagnosis** is to be recorded, use one of the following methods:

   a. Enter text into the diagnosis field, select an appropriate code from the suggested list.

   b. Right click within the diagnosis field and select **Insert Read Code**. The Read code browser will display, type and select a relevant diagnosis.

3. The code term will display in green text. To add this also as a **problem** / **summary**, double click on the entry and the **Read code details** dialogue will display.

4. Select if this entry is to display within **Summary** and or click to **Promote to a Problem**, select an appropriate **severity** and **episode** if appropriate click **Ok**.
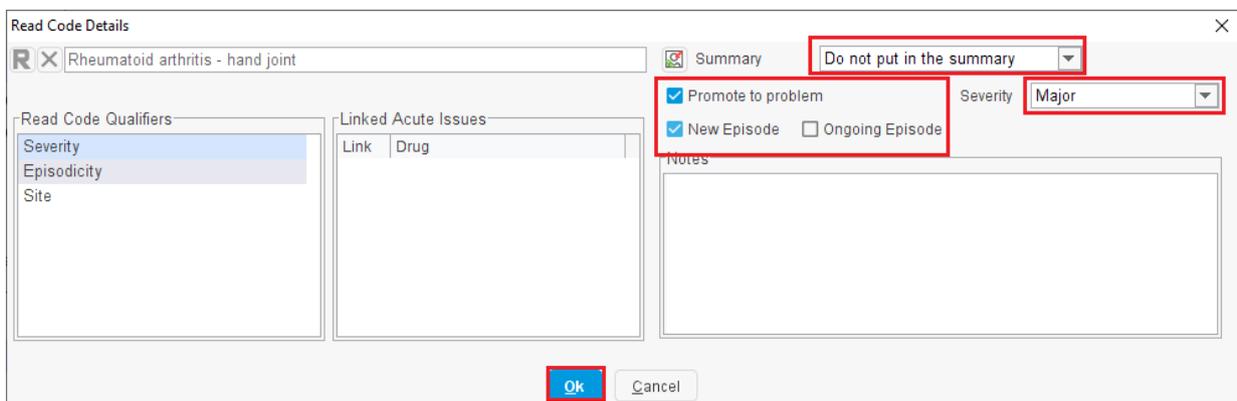
5. If the code select has been recorded within the patient record previously the link dialogue may display. Review the content and if you are happy to link the entries to this diagnosis, highlight and use the drop down arrow to link. Click **Ok.**
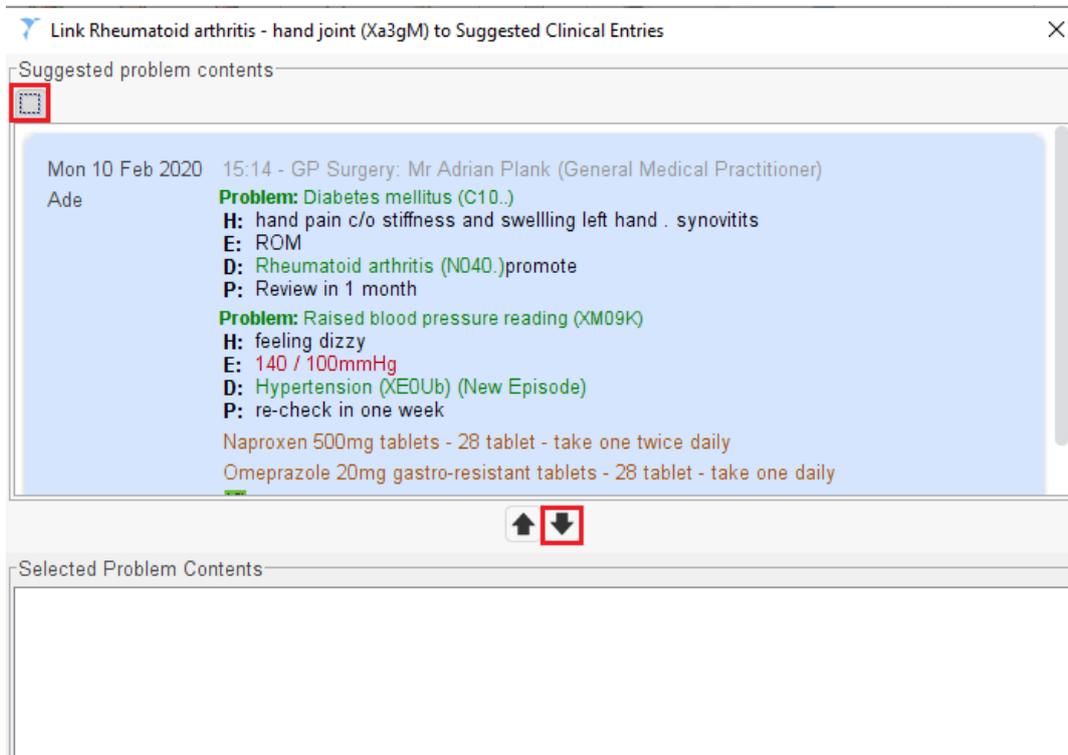

6. The entry will now display with the relevant flag.

Note: If Promote to Problem was used the consultation will automatically link to this problem, alternatively you can link a consultation to an existing problem without recording a diagnosis by clicking the green flag icon.
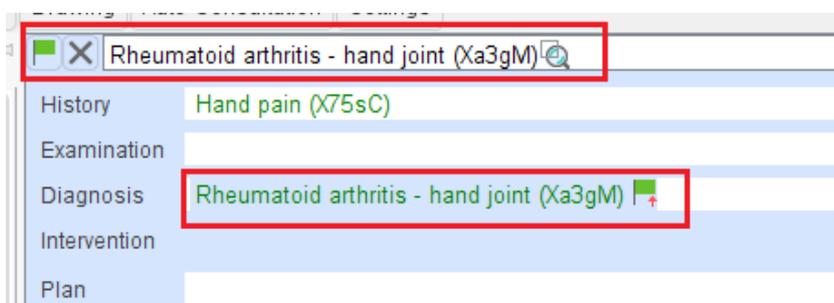
Recording a Numeric Entry

1. Numeric readings can be recording using one of the following methods:

   a. Right click within the examination field and select **Insert Numeric**. Type and search for a relevant entry for example **Weight, pulse, temperature**. Double click on your preferred entry and record the numeric reading for the entry selected.
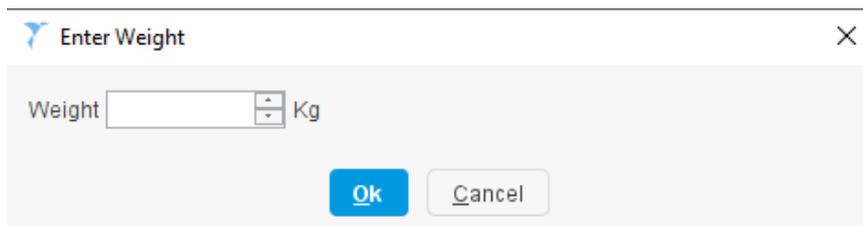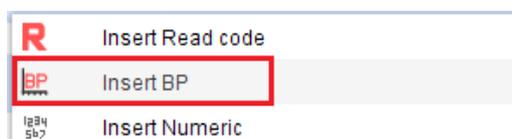

   b. A **Blood Pressure** can be recorded using a shortcut within the examination field type. Type BP and immediately record the reading e.g. **BP150/90** and press the spacebar.
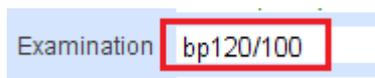
   Alternatively, right click within the examination section and select **Insert BP** and record the reading.

   c. Click an appropriate option from the **quick action toolbar** for example BP, Alcohol, Urinalysis.
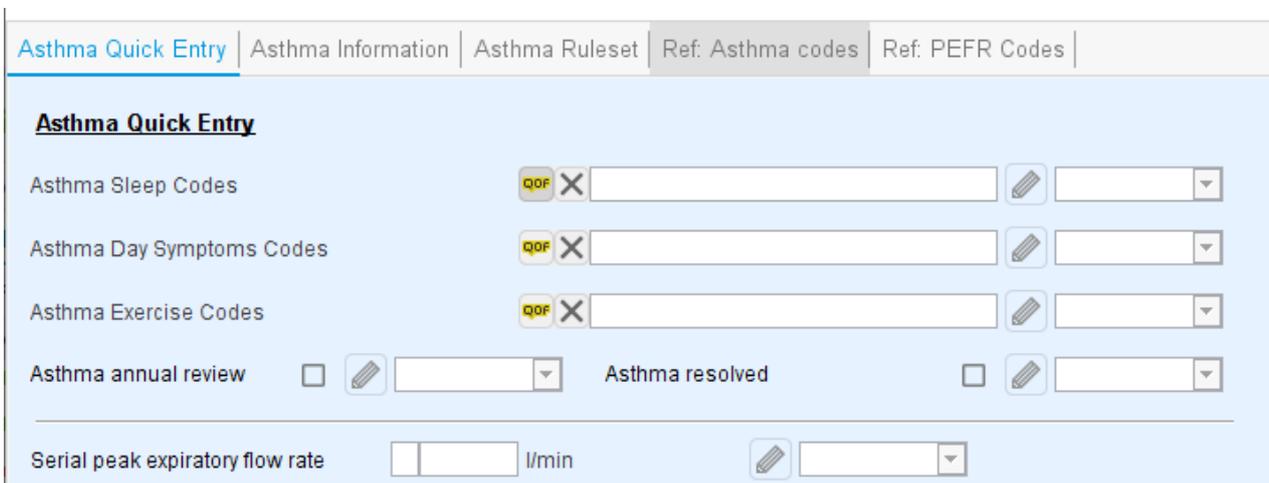
Data Entry Templates and Clinical Tools

Data entry templates and clinical tools can also be used to assist with the recording of information during a consultation.

Note: The system can be configured to display data entry templates and clinical tools within different sections of the patient record.

1. Data Entry Templates and Clinical Tools can be accessing using the following methods during a consultation:

   a. From the **Clinical Tree**, right click on the appropriate template and left click to select the template.

The data entry template will display, complete the relevant pages and fields. Click **Ok** when done.
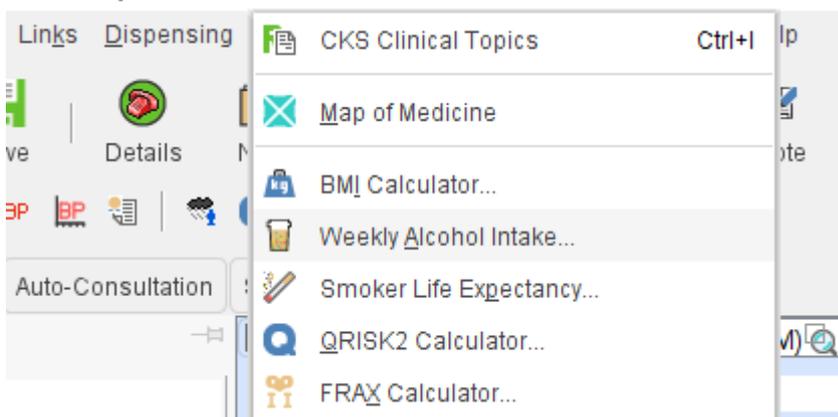

   b. Click a relevant template / tool using the **Quick Access Toolbar / Generic Toolbar.**

c. Click a relevant **Patient Status Alert** to launch a data entry tool.

d. Click **Clinical Tools** menu and select the relevant entry.


Recording a Recall

Recalls can be recorded during consultation. Please review practice processes for recalls as these will need to be managed on a monthly basis. Alternatively use **Plan** within consultation section and free text notes regarding a possible follow-up.

Note: Recalls can be recorded via a Data Entry Template using one of the methods shown above.
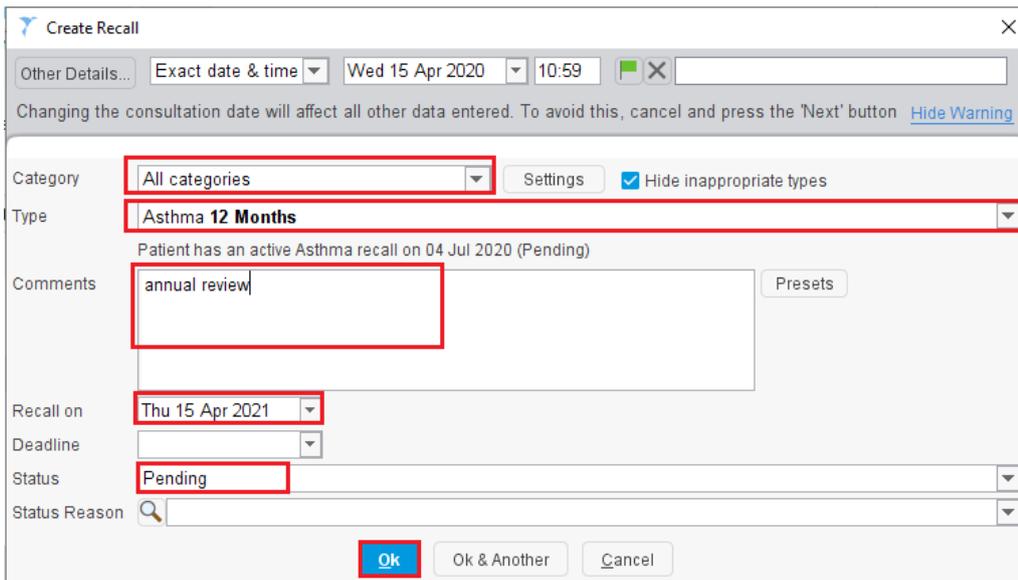
1. Right click **Recalls** from the **Clinical tree** and select **New Recall.**
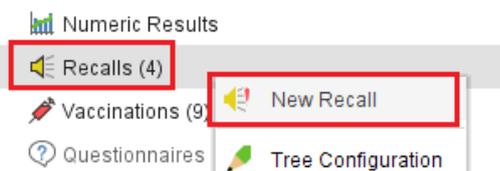
2. Select a relevant **Category** for the recall.

3. Select an appropriate **Recall Type** from the configured list.

4. Record and relevant comments.

5. Depending on the recall type selected the **Recall On** date may be populated, this can be changed or a new date set.

6. Leave the status as **Pending.**

7. Click **Ok.**

8. The recall will now display within the **Intervention** section of the consultation.

    Note: Any medication prescribed during consultation will also display within the Intervention section of the consultation. **See Separate Guide for Recording Medication.**

Recording Multiple Consultations

If the patient presents with more than one problem it is important to record these as part of the same contact but using separate consultations.

1. When the first entry is complete click **New Section.**
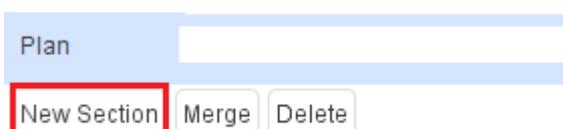
2. A new consultation section will now display and you second entry can be made.

3. Follow the same process to record any further problems the patient may present with.

4. If you have recorded a new section but realise this can be part of another section, Ctrl and click to select the consultation sections and click **Merge**.

5. The consultations will now be merged.

6. When the consultation is complete the patient record must be saved. Click **Save**.