



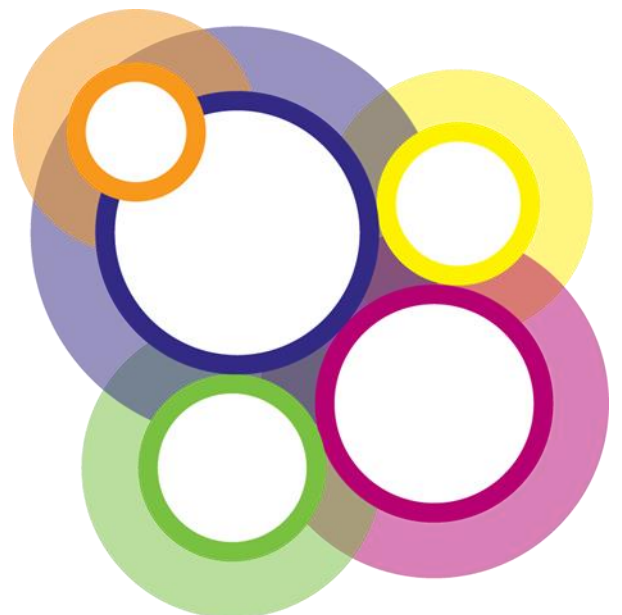
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**NECS Clinical Systems Specialist Team**

# SystemOne - Recording Different Types of Consultation Guide

Author: NECS Clinical Systems Specialists Team





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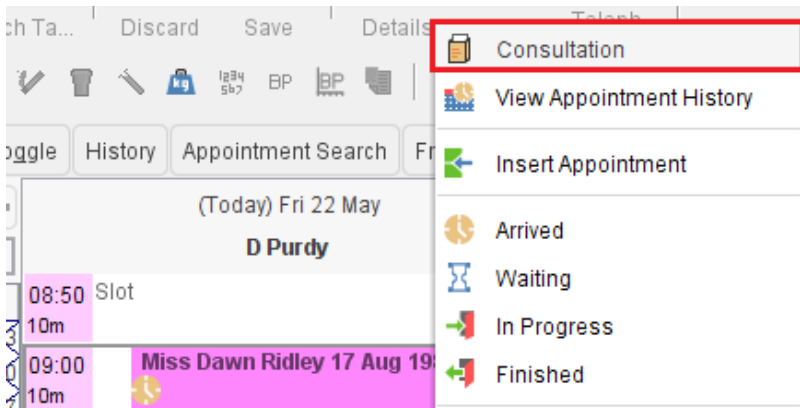
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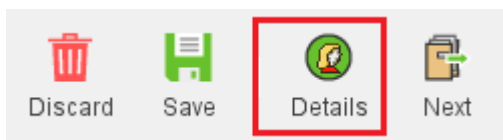
## Face to Face Consultation

1. Face to Face Consultations can be recorded using one of the below methods:
  - a. From the rota, right click on a patient who has arrived for their appointment and select **Consultation**



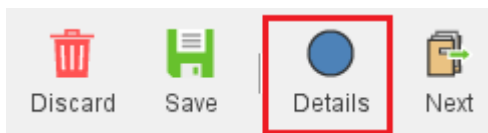
The patient record will open in consultation mode

The details will display as face to face



Record the consultation and **save the record** when complete

- b. **Retrieve** the **patient record** and click **Details** from the toolbar



Change the **date and time** if necessary, ensure the location is **surgery**, change the contact method to **face to face** and ensure **clinical relevant** is selected

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Date & Time

Template

Staff  
 Event done by  Known staff member   Unknown  
 Staff type   
 Authorised by

Location  
 Organisation   
 Other location    
 Comments

Contact  
 Contact method   Clinically relevant  Admin event  
 Event is incomplete (can be amended later)

The details will now show as face to face, Click **Start Consultation**

Search | Task | Sch Ta... | Discard | Save | **Details** | Next | Teleph... | Acute

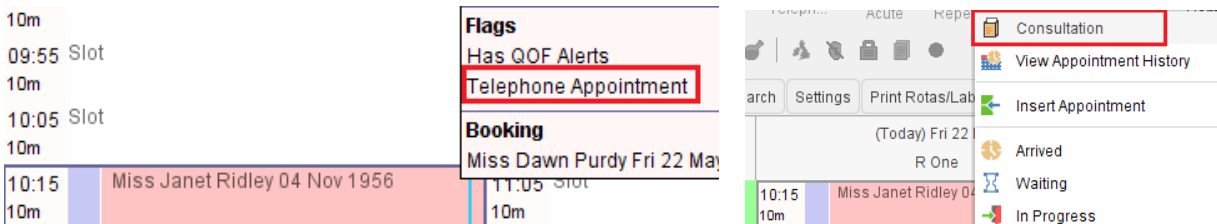
Start Consultation | Next Event | Event Details | Pathology | Drawing | Auto-Consultation | Settings

Record the consultation and **save the record** when complete

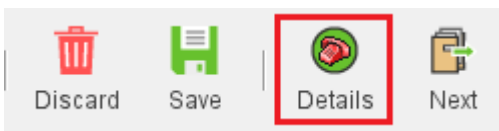
## Telephone Consultation

1. Telephone Consultations can be recorded using one of the below methods:

- a. From the appointment rota, If a telephone slot has been configured with the telephone flag. Right click on the appropriate **telephone slot** and select **Consultation**

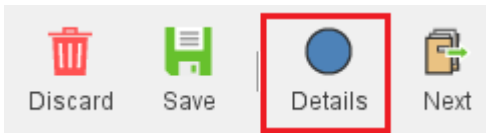


The patient record will open in consultation mode and the details will display as Telephone

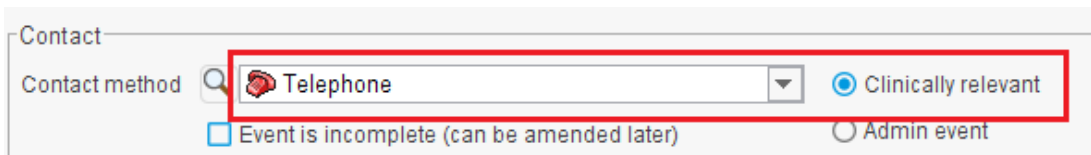


Record the consultation and **save the record** when complete

- b. **Retrieve** the **patient record** and click **Details** from the toolbar



Change the **date and time** if necessary, ensure the location is **surgery**, change the contact method to **Telephone** and ensure **clinically relevant** is selected



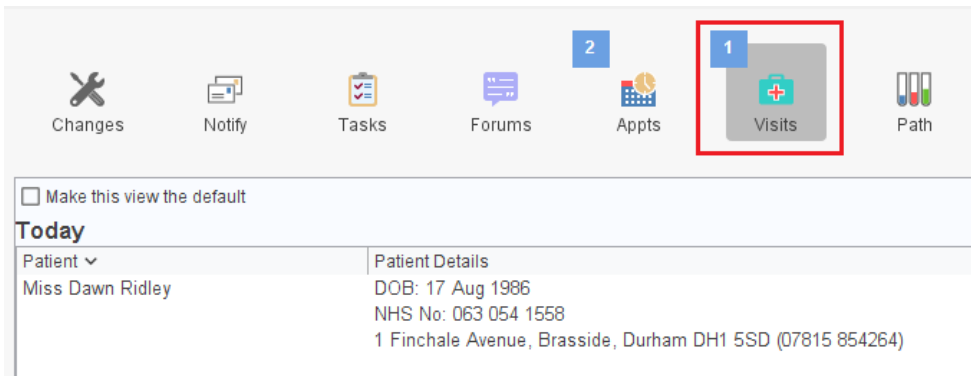
The details will now show as Telephone, Click **Start Consultation**, record the consultation and **save the record** when complete

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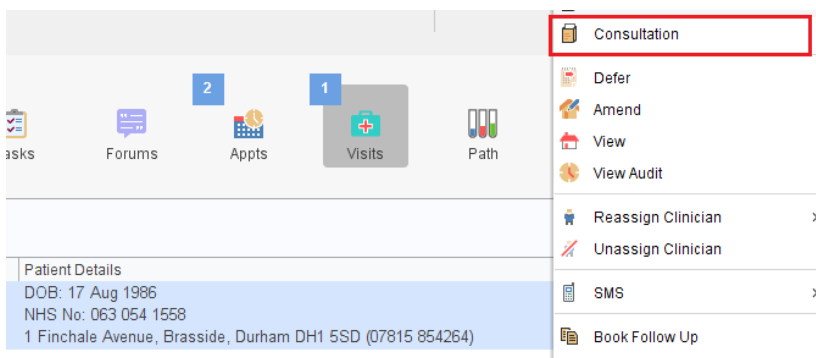
## Home Visit Consultation

1. A Home Visit Consultation can be recorded using one of the below methods:

- a. If the visits module is used to assign home visits to clinicians. Once the visit is complete, access the completed visit from the SystemOne home screen



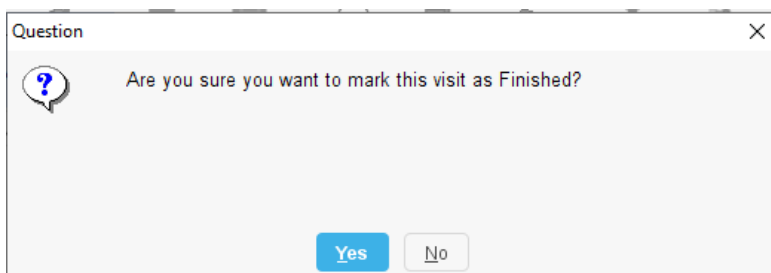
Right click on the appropriate patient and select **Consultation**



The details will show as **face to face** but the location will automatically change to **home** when the patient record is saved

Record the consultation and **save the record** when complete

A prompt will display to mark the visit as finished. Click **Yes**



b. **Retrieve the patient record** and click **Details** from the toolbar

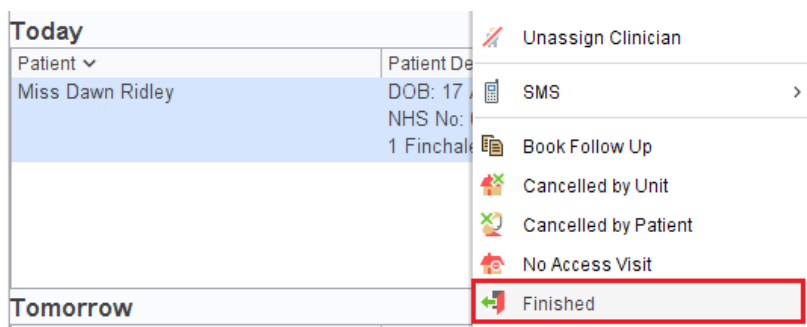
Change the date and time, other location to home, contact method to face to face and ensure clinically relevant is selected



The screenshot shows a form with two main sections: 'Location' and 'Contact'. In the 'Location' section, the 'Organisation' field contains 'NECS GP'. The 'Other location' dropdown menu is set to 'Home'. In the 'Contact' section, the 'Contact method' dropdown menu is set to 'Face to face', and the 'Clinically relevant' radio button is selected. There are also checkboxes for 'Event is incomplete (can be amended later)' and 'Admin event'.

Click **Start Consultation** and record the consultation, **save the record** when complete

Access the home visit, right click on the relevant patient and select finished



The screenshot shows a table with patient records. The first row is for 'Miss Dawn Ridley' with DOB: 17/01/1971 and NHS No: 1 Finchale. A context menu is open over this row, listing various actions. The 'Finished' option at the bottom of the menu is highlighted with a red box.

Today	
Patient	Patient Details
Miss Dawn Ridley	DOB: 17/01/1971 NHS No: 1 Finchale
<ul style="list-style-type: none"> <li>Unassign Clinician</li> <li>SMS</li> <li>Book Follow Up</li> <li>Cancelled by Unit</li> <li>Cancelled by Patient</li> <li>No Access Visit</li> <li>Finished</li> </ul>	
Tomorrow	

## Amending a Consultation Type Retrospectively

1. Find your saved consultation from the **Tabbed** or **New Journal** – right click over your name at the top of the entry.
2. Select **Amend Details**, click **Amend Location/Method** or **Amend Date**

