Guide and instructions for

Receptionists

www.care-response.com

CareResponse

Friday, 2 May 2014

Receptionist

Introduction

It is considered important for all healthcare organisations to recored and assess how well patients respond to care. Some third party payers such as insurance companies or the NHS insist on this. Care Response has been developed as a pragmatic way to collect information with minimal administration for participating clinics. Patients information is entered once and thereafter for most patients the collection of information is automatic.

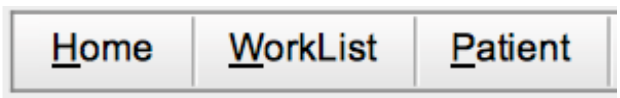
As a receptionist your role is to put patients details into the Care-Response system and to ensure that the practitioner has the results of the initial assessment form when they first see the patient. The whole development of the Care-Response system has been aimed to make this process as quick and simple as possible.

In most practices the majority of patients complete the initial assessment form from an email that the system sends to them. This means that their completed form is available in Care-Response before they arrive for their appointment. This is good as it saves time in the practice, and other than printing off the form for the practitioner there is nothing more you have to do.

Some patients are not able to do this either because they do not have access to email or because there is not time before they come in. For these patients the assessment form will be done when they arrive and they should be asked to come about 10 minutes early to allow time for this.

Navigating round Care Response

At the top left of all the windows is a list of tabs that can be used to move round the Care Response system. The labels on these are self explanatory.



Navigation tabs

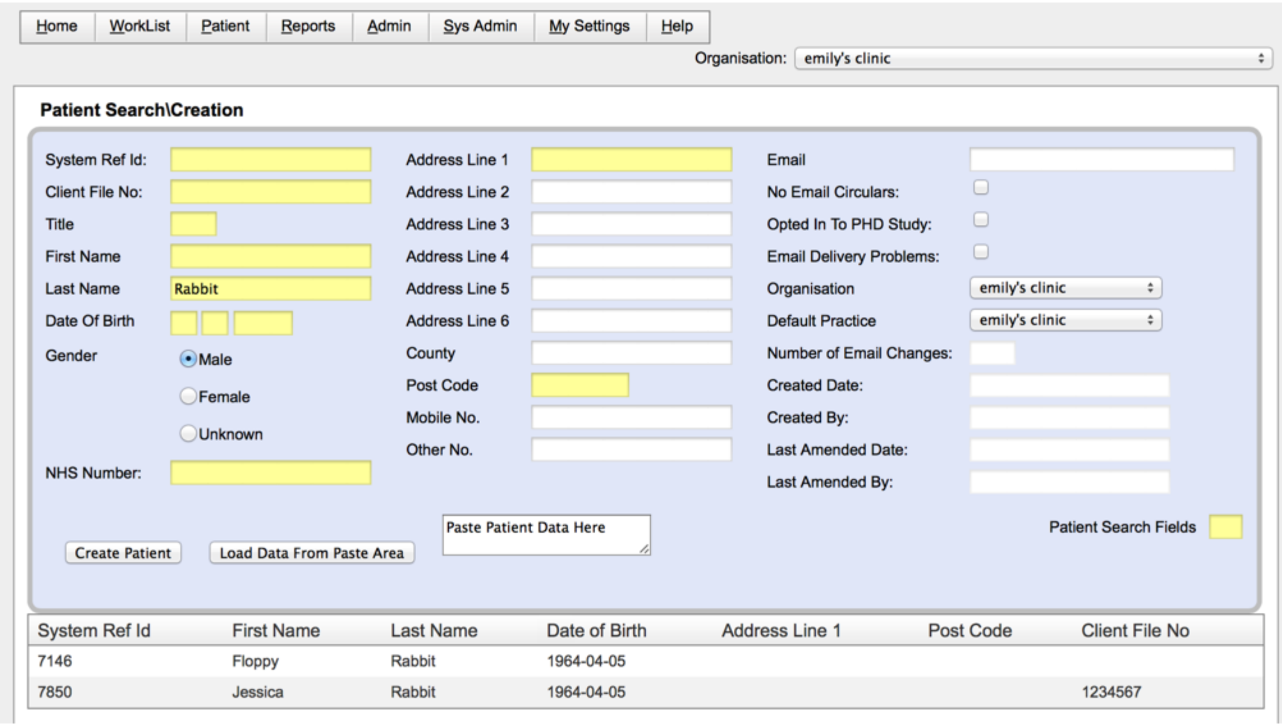
WorkList - Home screen

When you log in you will be shown a screen that gives you two choices; ‘Add or view a patient’, or ‘Go to my wordlist’.

Adding a new presentation / new patient

Each time a patient comes in with a new problem (which we call a new presentation) Care-Response needs to be told when the first visit is to send them an initial assessment. To do this select ‘Add or view a patient’ from the home menu. You can also do this by selecting ‘Search/Create’ from the Patient menu at the top of any window.

If it is a new patient to your clinic then fill in the blank fields as best as you can. At a minimum their name, date of birth and email must be completed. It is useful to have a phone number recorded as well as this may help you or a colleague at the practice later on. Once completed click the ‘Create Patient’ button to the left of the screen. If the patient has been to you before type in the initial of their first name and their last name and then select the correct patient from the list that appears below.

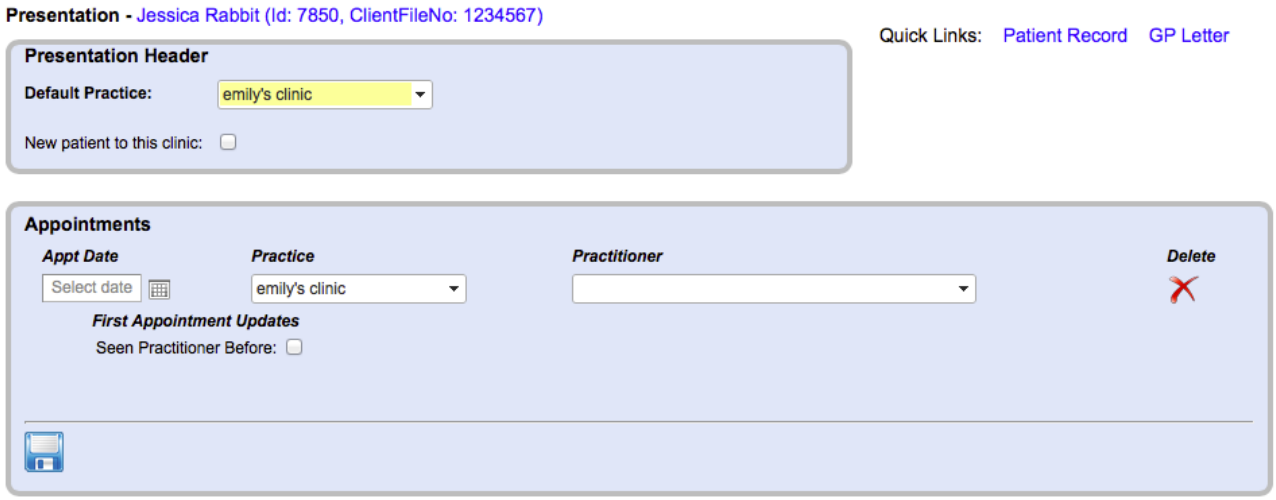


Add / edit patient window

If you have your patient files on a computer system such as Healthy Practice it may be possible to copy a patients address and paste it into the ‘Paste Address Here’ box. Then clicking on the Load Address From Paste Area button should fill in these fields for you. If this does not work because of the format that your computer system exports the address in let us know and we will try and accommodate it.

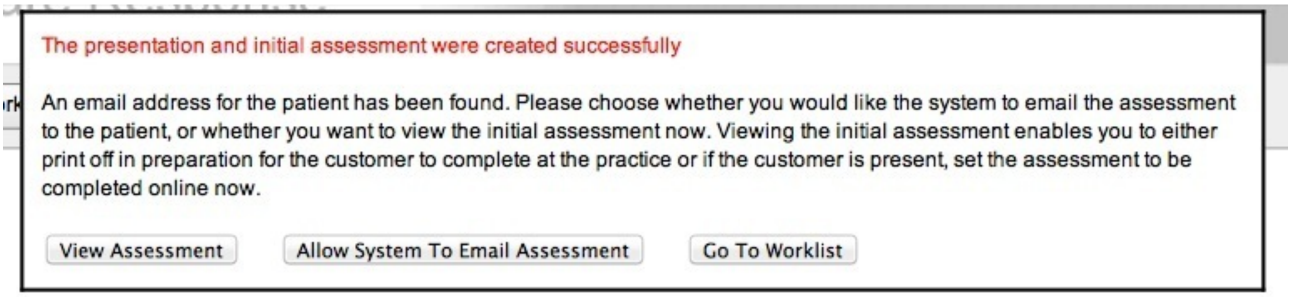
Now click the ‘Create New Presentation’ button which will appear at the bottom of the window. Note that if the patient has had one or more presentation in the past then this button will appear below these.

The screen will change to show you the details of the first visit for this new presentation. In the Appointments area set the practice, practitioner and date of the visit. If you know this please set the check boxes indicating if this patient is new to your clinic and if they have seen this practitioner before.



Presentation detail window

If all is well you will see a confirmation box pop up.



Confirmation of creation of initial assessment

You now have options:

- If the patient had an email address you can now select Allow System to Email Assessment. This causes an email to be sent with a link from which the patient can complete the assessment on-line. This is the most frequently used option. If there is no email address you will not be given this option.
- Go To WorkList - takes you back to your starting page. If the patient is to complete the assessment in the practice when they come in use this option. You can call up the assessment to be completed later.
- View Assessment - you may use this if you want to complete the assessment right now on your screen, possibly because the patient is sitting at it with you. This is rarely used.

Presentation Header information section.

At the top of the Presentation window is a small panel called the Presentation Header. The top right section of this provides some information about the status of the patients outcome assessments. When a presentation is first created it is empty however it changes she Care Response creates and send an assessment. The table below shows the different messages and their meanings.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NEW                           - New presentation, no assessments
emailed
INITIAL ASSESS INIT           - Initial assessment emailed
INITIAL ASSESS REM COMP       - Initial assessment reminder emailed
INITIAL ASSESS COMP           - Initial assessment complete
OUTCOME STAGE                 - Outcome assessment completed, but less
than 10 days from first appointment date.  Can't class as 14 day
assessment.
OUTCOME 14 INIT               - 14 day assessment emailed
OUTCOME 14 REM COMP           - 14 day assessment reminder emailed
OUTCOME 14 COMP               - 14 day assessment complete
OUTCOME 30 INIT               - 30 day assessment emailed
OUTCOME 30 REM COMP           - 30 day assessment reminder emailed
OUTCOME 30 COMP               - 30 day assessment complete
OUTCOME 90 INIT               - 90 day assessment emailed
OUTCOME 90 REM COMP           - 90 day assessment reminder emailed
OUTCOME 90 COMP               - 90 day assessment complete
STOPPED                        - the stop assessment tick box has been
checked either by the practice or by a patient opting out.
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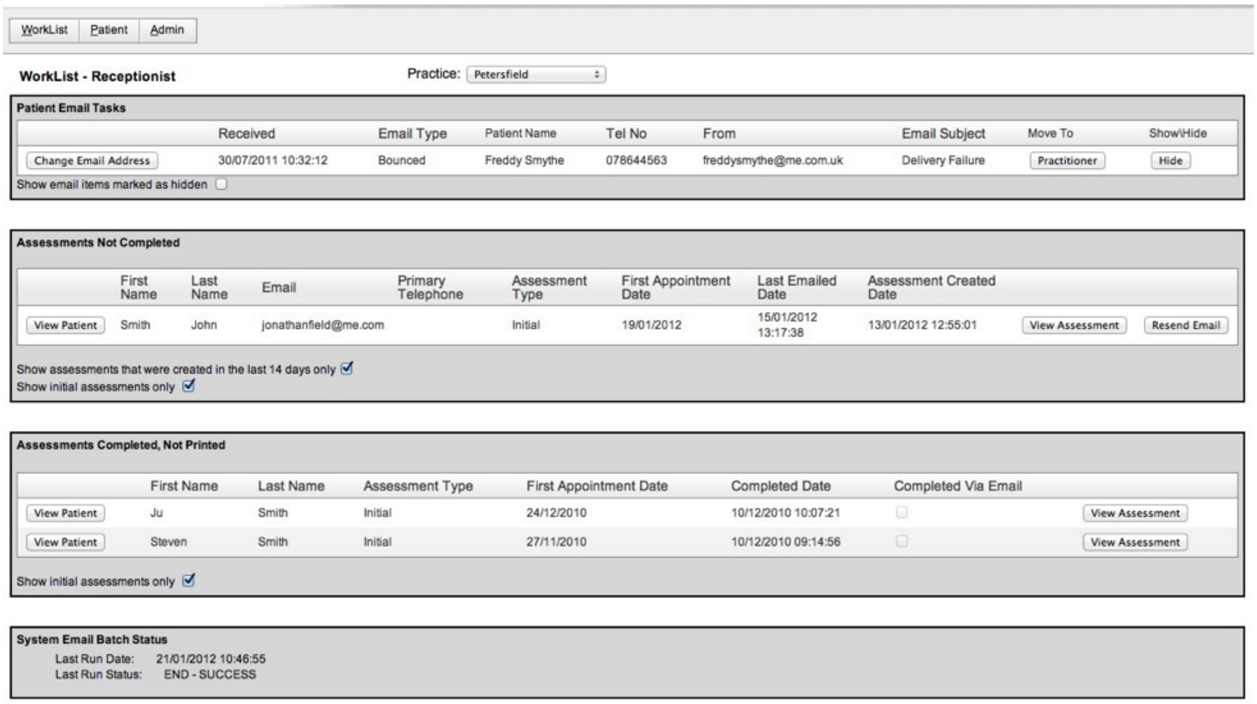
WorkList - Reception screen

When you log in you will be shown a screen that gives you information about the status of any patient activity that may need your attention. We call this a WorkList as it places any outstanding tasks in queue's. In an ideal world its three sections will be as empty as possible. You can return to this screen at any time by selecting WorkList from the menu towards the top left of the window.

The three sections in the WorkList screen are described more fully else where and they are:
Patient Email Tasks - emails that have been refused and need updating.
Assessments Not Completed - patients who have not yet returned assessments.
Assessments Completed, Not Printed - returned assessments not yet printed.

If there is more than one practice within your organisation there will be a separate WorkList for each practice. You can change the one you are looking at by selecting other practices from the practice pull down list towards the top centre of the window.

The final box at the bottom of the screen shows the System Email Batch Status. Emails and assessments are sent out every 15 minutes. This box tells us when the last set were sent and if we want to we can therefore work out when the next set will be sent.



WorkList - Reception screen

Assessments Completed, Not Printed

The initial assessment contains information that a practitioner is likely to find useful when first seeing a patient with a new problem (new presentation). CR provides a summary of this information that can be easily printed.

In the Receptionists WorkList is a section called ‘Assessments Completed, Not Printed’. From this list you can see the patients whose forms have not been printed. Clicking on the View Assessment button calls up the summery of the initial assessment. This should be printed as you would any window from your internet browser - often by choosing print from the file menu. This can differ from system to system so if you are not sure how to do this please ask someone at your practice familiar with the computer there.
Once printed click on the ‘Mark as Printed’ button in the window. The text under this will change from - Assessment Print Status: Not Printed. To say printed and giving the date and your name.
Returning to your WorkList now and the line will have been removed from the Not Printed section.

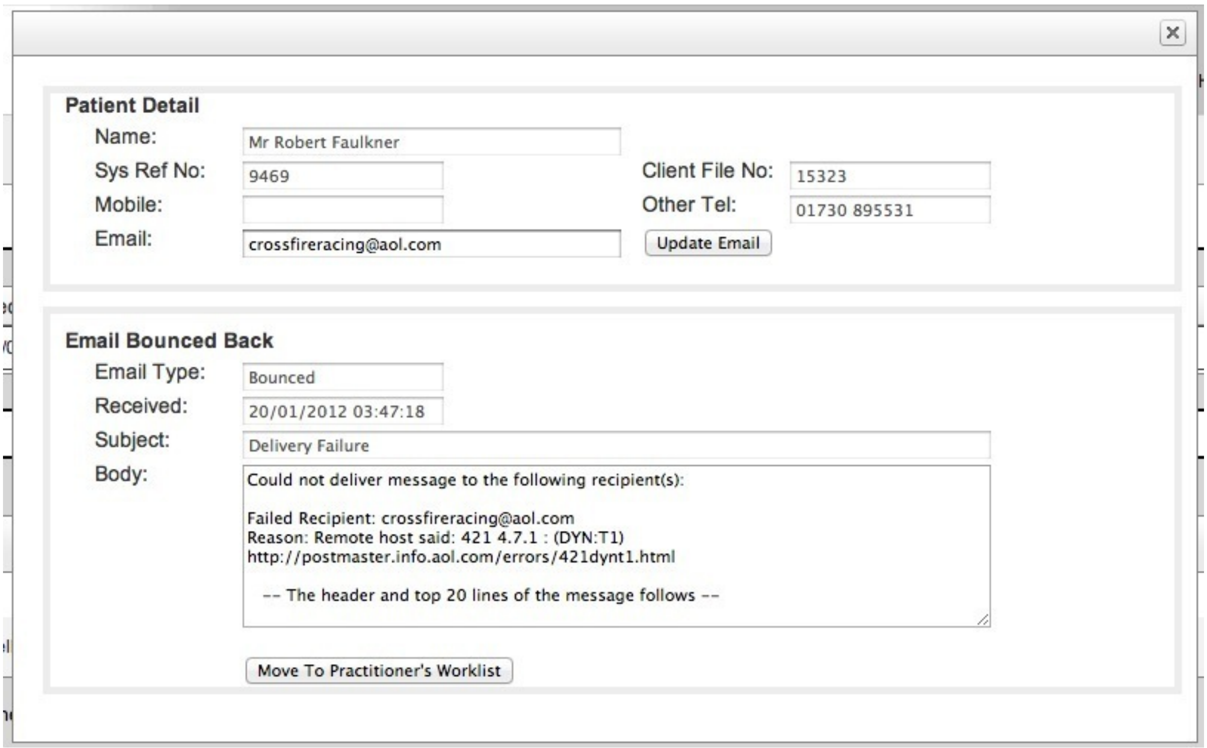
Assessments not completed

There is a section in the Reception WorkList which lists patients who have been set up with an initial assessment but this has not been completed on Care-Response.

For those completing this on-line it tell us that they have not done so yet. It is worth keeping an eye on this and possibly contacting the patient if the day of the appointment is close and you were expecting it to have been done. The list contains a contact number for the patient and a button that enables the email with the form to be resent. This button is to the far right of the list and on some computer screens you may have to scroll to the far side of the window to see it.
Where patients are going to complete the form in reception before their appointment this list can serve as a reminder to have them do this when they come in. For these patients practices either ask them to complete the forms on paper and then reception enters the responses into Care-Response or asks the patients to directly enter their answers using a computer or iPad. To do either of these click the View Assessment button in the work list and enter the responses. Click Save Assessment to finish.
Once the form has been saved it should be printed and then the button called 'Mark As Printed' pressed. This prevents the patient from appearing on your Assessment Completed, Not Printed' WorkList, if you don't do it now you can of course print the form and mark it as printed from this list but it is extra work.
Note that if your practice uses an iPad or an unsupervised computer for patients to complete forms on clicking the 'Set For Patient Input' will correctly format the form for the device and will safely lock the system preventing other patients details from being seen.

Patient Email Tasks

Sometimes the email address for a patient in the Care-Response may be incorrect. Either because the wrong one was entered when the patient was set up, or if a patient has changed their email. This causes messages Care-Response sends out to be returned (bounced back). If this happens then the patient will not be receiving our messages and will be unable to complete the assessments. It is therefore important that we update the address with the correct one.
Bounced back messages will appear in the 'Patient Email Tasks' WorkList along with a contact telephone number for the patient. You can view the message and change the email address by selecting the 'Change Email Address' button. Changing the email address in in the window that appears and selecting 'Update Email' will remove the patient from your Email Tasks WorkList. To close the window without updating the email click the close box to the very top right of this window.



Bounced email window

Rarely you may find that the message in the window was not about a bounced email. If this was a message for the practitioner you have received by mistake select the ‘Move to Practitioners WorkList button’ which will remove it from you WorkList. If the message relates to a clinical matter or appears important it may be an idea to ask the practitioner to check their WorkList as they may not do this regularly. Otherwise read the message and then remove it from your WorkList by pressing the ‘Hide’ button at the far right of the window.