

# IP Nurse Refresher

*Inpatient Ward Staff*

*User Guide*

*Patient Flow*

*PowerChart*

Support available through:

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## Accessing Patient Flow

Log onto the computer as usual

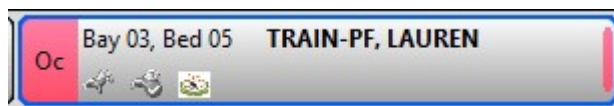


From your desktop, double click on the  icon to open the Patient Flow system.

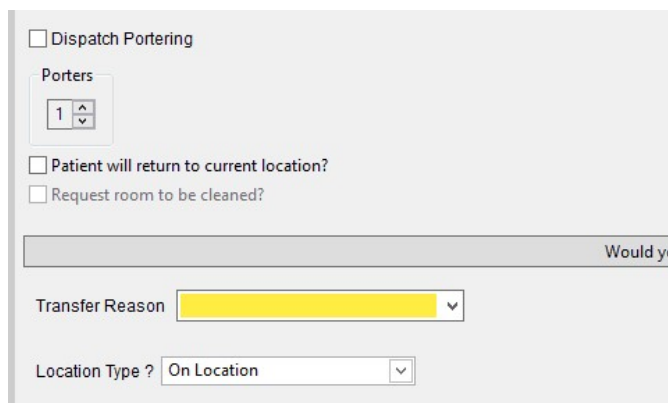
## Transfers

### Transfers within the same ward

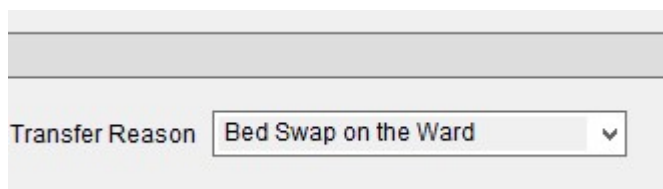
**Step 1.** On the Bed Board, Find the patient you wish to move beds and select them so there is a blue line around them.



**Step 2.** Now click and drag and drop the patient into an available bed. This will generate a pop up.

A screenshot of a transfer pop-up form. The form has a light gray background. At the top, there is a checkbox labeled 'Dispatch Portering'. Below this, there is a section titled 'Porters' with a dropdown menu showing the number '1'. Underneath, there are two checkboxes: 'Patient will return to current location?' and 'Request room to be cleaned?'. A horizontal line separates these from the bottom section. Below the line, there is a label 'Transfer Reason' followed by a yellow dropdown menu. At the bottom, there is a label 'Location Type ?' followed by a dropdown menu showing 'On Location'. The text 'Would ye' is partially visible on the right side of the form.

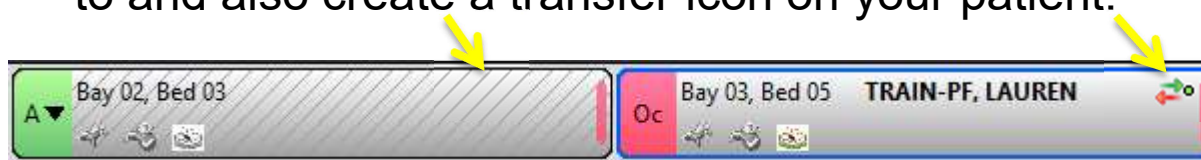
- Step 3.** You must fill out the **Transfer Reason** (highlighted in yellow). Do not change any other field, as you will not require porters.



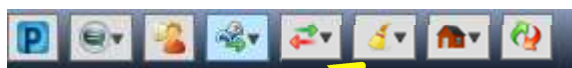
A screenshot of a web form showing a dropdown menu labeled 'Transfer Reason'. The selected option is 'Bed Swap on the Ward'.

- Step 4.** Click **OK**.

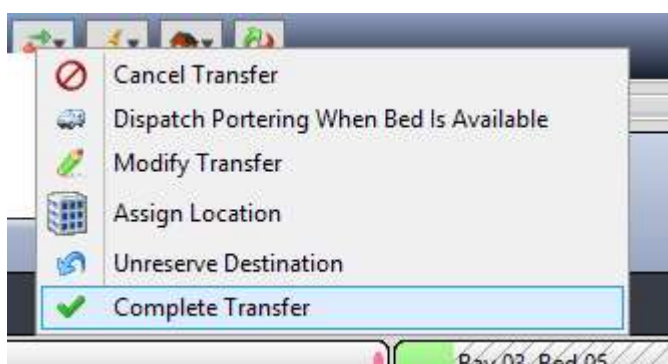
- Step 5.** This will grey out the bed you intend to swap the patient to and also create a transfer icon on your patient.



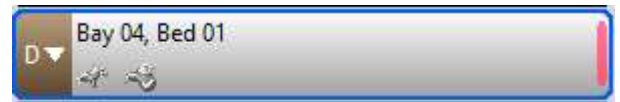
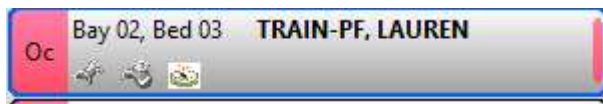
- Step 6.** Your patient should still be selected (Surrounded in blue). Now click on the **Transfer Icon** on the bed board.



- Step 7.** Simply click on the option 'Complete Transfer'.



**Step 8.** This will automatically move the patient to the new bed on the bed board and put the original bed into a 'dirty' status.

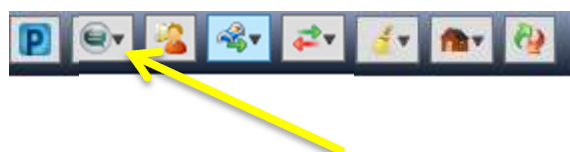


## Transferring Consultants

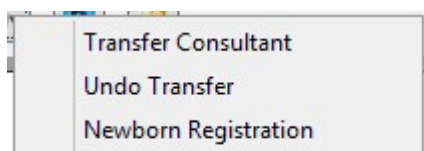
This process will detail how you change the name of the lead (attending) clinician

**Step 1.** Select the patient from the Bedboard that you would like to change the lead clinician. Note the current clinician is shown next to 'Attending Clinician'.

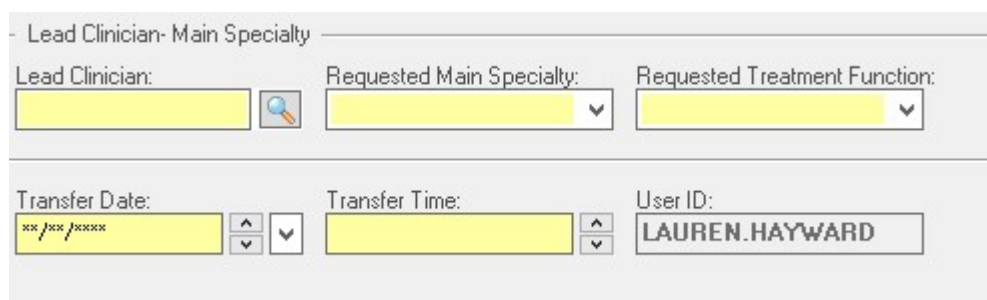
**Step 2.** Click on the PM Conversation Icon



**Step 3.** Select **Transfer Consultant**. This will open the PM Office Transfer conversation.



**Step 4.** Fill in the mandatory information (highlighted in yellow).  
Type in the new consultant in the **Lead Clinician** Box.



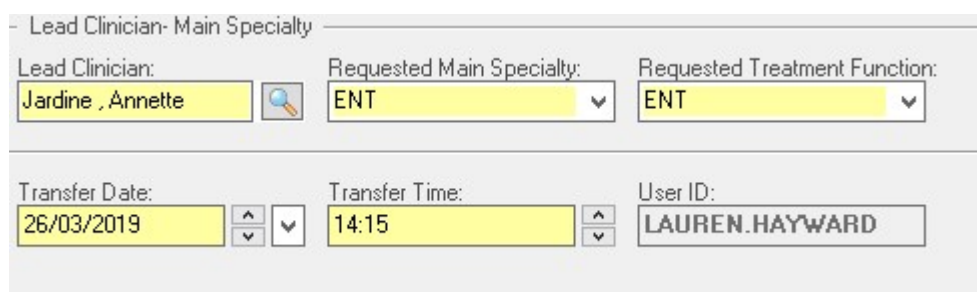
- Lead Clinician- Main Specialty

Lead Clinician: [Yellow box] [Search icon] Requested Main Specialty: [Yellow dropdown] Requested Treatment Function: [Yellow dropdown]

Transfer Date: [Yellow date picker] Transfer Time: [Yellow time picker] User ID: LAUREN.HAYWARD

**Step 5.** Once filled in the Specialty will automatically complete.  
Dependant on the clinician, you may have to select the Treatment Function

**Step 6.** Type in the current date and current time.



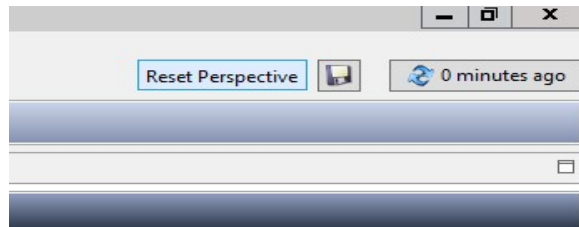
- Lead Clinician- Main Specialty

Lead Clinician: [Yellow box with 'Jardine , Annette'] [Search icon] Requested Main Specialty: [Yellow dropdown with 'ENT'] Requested Treatment Function: [Yellow dropdown with 'ENT']

Transfer Date: [Yellow date picker with '26/03/2019'] Transfer Time: [Yellow time picker with '14:15'] User ID: LAUREN.HAYWARD

**Step 7.** Click **OK**. This will complete the PM Office conversation and return you to Patient Flow.

**Step 8.** Click the refresh button in the top right hand corner of the screen.



**Step 9.** Double click on your patient. The clinician details have changed.

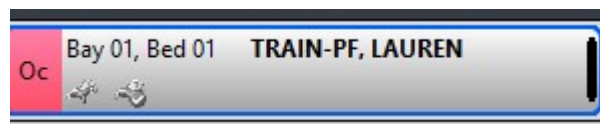
A screenshot of a 'Patient Details' window. The header is pink and contains the following information: **TRAIN-PF, SELINA** (Female, 33 years), Birth Date: 23/03/1986, MRN: 2216859, FIN: 2002379948. Below the header, there are fields for NHS Number, Current Location (Parry Ward-Bay 02, Bed 05), and Attending Clinician (Jardine, Annette). There are also fields for Diagnosis and Last Known Location. Below these are sections for Patient Attributes (with a checked box for 'Falls Risk') and Location Attributes (with checked boxes for 'Bariatric Bed', 'Certified', 'Enhanced Observations', and 'Medical Ward'). At the bottom, there is a 'Comment:' field with a text input area and an 'Undo' button. The window has a light blue header and a white body.

You have completed the consultant transfer.

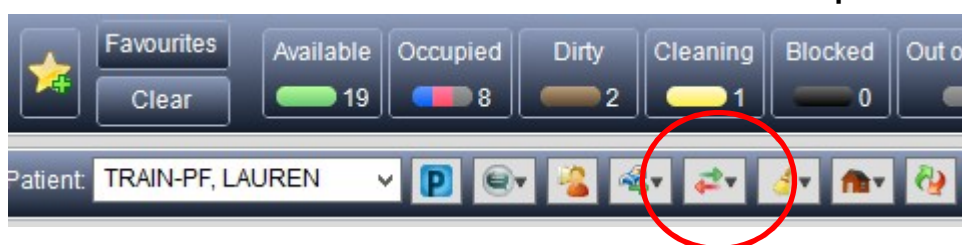
## Transferring a Patient to a New Location

**Step 1.** Find the patient you wish to move to a new ward via Global Search or your wards bed board

**Step 2.** Select your patient so they are highlighted.



**Step 3.** Select the transfer icon to transfer the patient.



**Step 4.** This will generate the **Transfer Patient** box.

A screenshot of the 'Transfer Patient' dialog box. It contains patient information: TRAIN-PF, LAUREN, Female, 26 years, Birth Date: 21/10/1992, MRN: 2216863, FIN: 2002379966. It also shows the current location (Parry Wards-Bay 01, Bed 01) and attending physician (Robinson, Anthony). There are sections for Patient Attributes (Bariatric Bed, Cardiac Monitoring, Dementia, etc.) and Portering Details (IV Pole, Monitor, Nurse Escort, etc.). The dialog has OK and Cancel buttons at the bottom.

**Step 5.** Click **OK**

**Step 6.** The patient will now be on the transfer List.



**Step 7.** Go to the transfer list and find the patient.

Name	Action
PHARM, TTANOW	All W:
TRAIN-PF, DJELECTIVE	Admi
TEST04, RICK	Emer
TEST-RETTIE, EARLY	Ches
LINEGAR, LIMPY	Emer
TRAIN-PF, LAUREN	Parry
TRAIN-PF, DJELECTIVE	Admi
SOONES, WALTER JULIAN	All W:

**Step 8.** Open the bed board of the receiving ward.

**Step 9.** Select your patient from the transfer list and drag and drop them onto the appropriate location on Parry ward.

**Step 10.** This will open a pop-up to dispatch Porters

**Step 11.** Ensure you have selected **Dispatch Portering** and supply a transfer reason. Click **OK**.

**Step 12.** This will open another

pop-up for a Transport request where you can specify additional information about the patient.

**Step 13.** Click **OK**.

**Step 14.** The porter request will be sent to the allocated porters and patient will be moved on the system when the porters start the job.

**Note:** Transferring Consultant must be completed as soon as the patient arrives from another ward. This ensures all results go to the correct clinician.

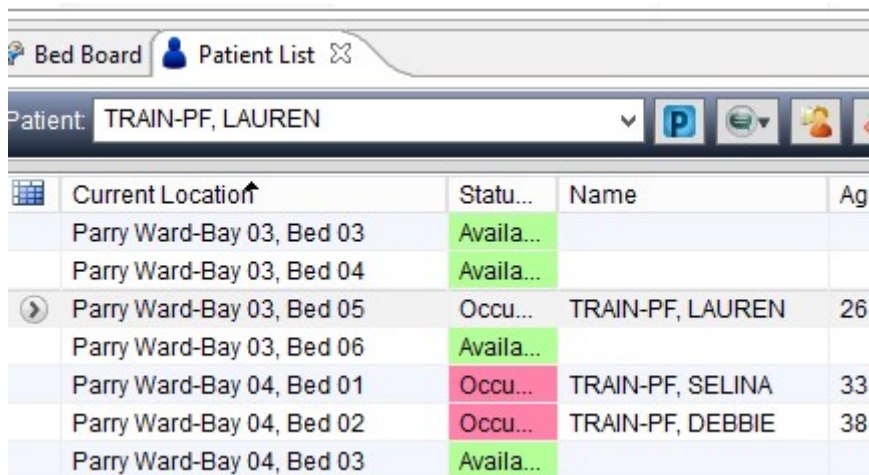
## The Discharge Process

This section shows you how to discharge a patient from Patient Flow. In order to discharge a patient they must be on the Discharge List

### Initiating the Discharge Process

The Discharge Process in Patient Flow is usually initiated by completing the 'Patient Status' Powerform in PowerChart.

**Step 1.** Find your patient in the **Patient List**.



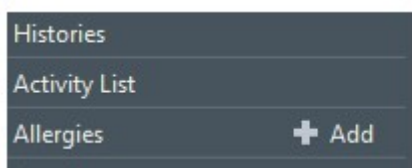
Current Location↑	Statu...	Name	Age
Parry Ward-Bay 03, Bed 03	Availa...		
Parry Ward-Bay 03, Bed 04	Availa...		
Parry Ward-Bay 03, Bed 05	Occu...	TRAIN-PF, LAUREN	26
Parry Ward-Bay 03, Bed 06	Availa...		
Parry Ward-Bay 04, Bed 01	Occu...	TRAIN-PF, SELINA	33
Parry Ward-Bay 04, Bed 02	Occu...	TRAIN-PF, DEBBIE	38
Parry Ward-Bay 04, Bed 03	Availa...		

**Step 2.** Select your patient.

**Step 3.** Click on the **Power Chart**  button to open Power Chart.

**Step 4.** This will launch Power Chart on your patient's record


**Step 5.** Once in Power Chart, click on **Activity List** in the left column.



**Step 6.** Select the **PowerForms** tab on the right hand side.

(no time frame defined)					
SALT Referrals	Physio Referrals	OT Referrals	Dementia Referrals	Safeguarding	<b>PowerForms</b>

**Step 7.** Select the **Patient Status** form and complete in the usual way.

Once completed and signed, close PowerChart and return to Patient Flow. Your patient will have a house symbol  in their Patient Attributes field to indicate that the Discharge Process has been initiated.

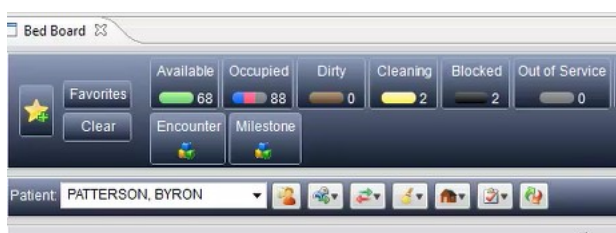
The patient will now appear in the **Discharge List**.

**Note:** The Patient Status part 3 should be updated regularly to ensure that the Discharge List is upto date.

## Confirmed Discharge

Once the patient's discharge date has been confirmed you will need to show this in Patient Flow.

**Step 1.** Locate your patient via the Discharge List or Patient list and select them



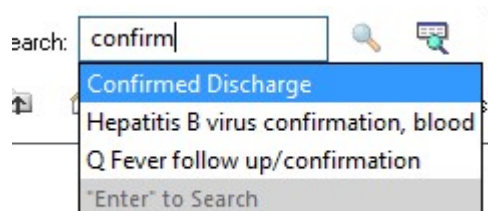
**Step 2.** Click on the **Power Chart**  button to open Power Chart.

**Step 3.** This will open Power Chart. Select **Requests / Meds / CarePlans**

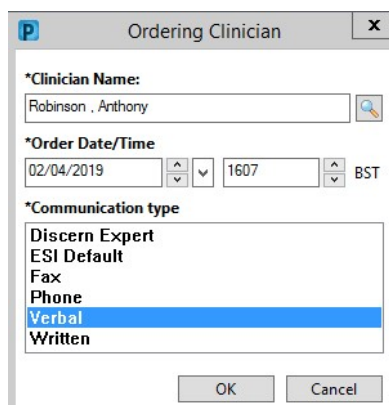


**Step 4.** Select **Add**  

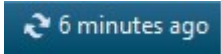
**Step 5.** When the search window opens, type **confirm** and select the option **Confirmed Discharge**




**Step 6.** In the **Ordering Clinician** pop-up, fill in the details and click **OK**, and then click **Done**.



**Step 7.** Click **Sign** to complete the order

**Step 8.** Click on the Refresh button  6 minutes ago to complete the process.

**Step 9.** Now close Power chart and go back to Patient Flow.

**Note:** You should now see a House with a green dot next to the patient to indicate that there is a confirmed discharge for the patient. 

## Cancelling a Confirmed Discharge

If the patient's confirmed discharge needs to be cancelled you will need to show this in Patient Flow.

**Step 1.** Locate your patient via the Discharge List or Patient list and select them

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**Step 2.** Click on the **Power Chart**  button to open Power Chart.

**Step 3.** This will open Power Chart. Select **Requests / Meds / CarePlans** 

**Step 4.** Find the patient's Confirmed Discharge, right click on the entry and select Cancel/DC from the menu.

This will remove the Green Dot from the house. However the estimated discharge date will remain on the Patient Status form, which is why the house icon remains.

## Day Case Patients

Day Case patients do not have a Patient Status Form and so need to be added to the Discharge list in a different way.

**Step 1.** Locate your patient via the Bed Board or Patient list and select them.

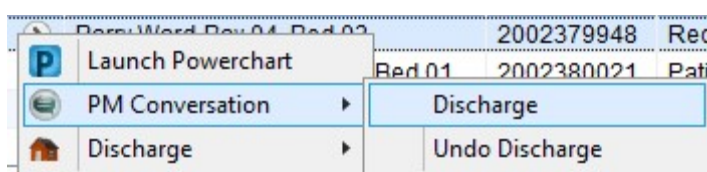


**Step 2.** Click on the **Discharge** button and select **Discharge Patient**.

This will add your patient to the discharge list. You can now proceed to discharge them from the hospital. There is no requirement to confirm the discharge.

## Completing the Discharge Process

**Step 1.** Click on the Arrow on the left of the patient's details and select **PM Conversation** and then **Discharge**.





## Step 2. This will open PM Office.

The screenshot shows a 'Discharge' form with the following fields and values:

- MRN: 2216859
- NHS Number: - -
- NHS No Status: [Dropdown]
- Financial Number: 2002379948
- Name: TRAIN-PF, SELINA
- DOB: 23/03/1986
- Age: 33Y
- Gender: Female
- Building: All Wards
- Department/Ward: Parry
- Encounter Type: Inpatient
- Lead Clinician: Robinson, Anthony
- Treatment Function: Endocrinology
- Discharge Method: [Highlighted in yellow]
- Discharge Destination: [Highlighted in yellow]
- Comment/Discharged To: [Text area]
- Deceased Info: [Section header]
- Discharge Info:
  - Discharge Date: 04/04/2019 [Highlighted in yellow]
  - Discharge Time: 09:26 [Highlighted in yellow]
  - User ID: LAUREN.HAYWARD
- Discharging Staff Member: [Text field with search icon]

At the bottom right, there are 'OK' and 'Cancel' buttons. The status bar at the bottom shows 'Ready' and 'C0470 | LAUREN.HAYWARD | 04/04/2019 | 09:27'.

## Step 3. Fill in all the highlighted fields.

- Discharge Method.
- Discharge Destination.
- Discharge Date.
- Discharge Time.

## Step 4. Now click **OK**.

**Note:** The patient has now been discharged from the hospital and their entry removed from the Bed board and the Discharge List in Patient Flow.

## Deceased patient

In order to have a deceased patient portered, **NOT TRANSFERRED**, to the Mortuary they must first be on the Discharge List.

If the patient is not on the list as the Patient Status has not been completed then use the process for a Day Case patient

**Step 1.** From the **Discharge list** Select the patient

**Step 2.** Click the options button to the left of the patient's name, select discharge and start discharge.



**Note:** **Only** when the deceased patient is ready to leave the ward and move to the mortuary should you complete the following steps.

**Step 3.** Click the options button to the left of the patients name again and now click Discharge, Dispatch Transport.



**Step 4.** Select the destination to be MORTUARY, check if two porters are required, and add any necessary comments. Click **OK**.

## Completing Deceased Patient discharge

**Only complete the Following process when the patient has left the ward and is now in the mortuary.**

The patient has reached the mortuary when the portering icon disappears from their milestones on the discharge list

**Step 1.** Ensure that you are on the Discharge List and find the Patient.

**Step 2.** Click the options button to the left of the patients name and select PM Conversation then Discharge.



This will open up PM Office.

**Step 3.** Select **Discharge method** from the drop down menu and select **Patient Died**. This will automatically fill in the rest of the conversation.

The screenshot shows a patient discharge form for patient TRAIN PF, LAUREN. The 'Discharge Method' dropdown is set to 'Patient Died', and the 'Discharge Destination' is 'Not Applicable Died or Still...'. Other fields include MRN (2216863), NHS Number, NHS No Status, Financial Number (2082379966), Name, DOB (21/10/1992), Age (26Y), Gender (Female), Building (All Wards), Department/Ward (Main Theatre Department), Encounter Type (Inpatient), Lead Clinician (Robinson, Anthony), Treatment Function (Endocrinology), and Deceased Info (Death Notification Status: Informal, Deceased Date: 10/04/2019, Deceased Time: 14:12, Death Verified By: [signature], Organs Donated: [dropdown]). The Discharge Info section shows Discharge Date: 10/04/2019, Discharge Time: 14:12, and User ID: LAUREN.HAYWARD. An 'OK' button is at the bottom right.

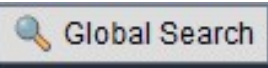
**Step 4.** Click **OK**.  
The patient has now been discharged deceased and removed from Patient Flow.

## Equipment Portering

Portering equipment around the hospital.

**Step 1.** At the top of the Patient Flow screen select **Equipment List**.

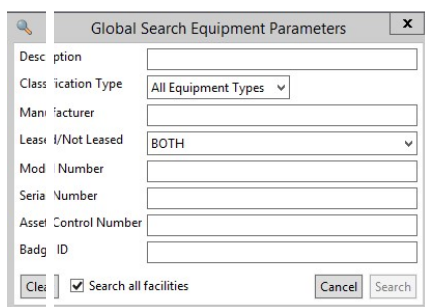
The screenshot shows the top of the Patient Flow screen with three tabs: 'Transfer List', 'Discharge List', and 'Equipment List'. The 'Equipment List' tab is selected. Below the tabs, there are status indicators: 'Transfer List 9/19', 'BBC Out 0/0', 'BBC In 0/0', 'Mary Out 0/0', and 'Mary In 0/0'.

**Step 2.** Click on Global Search  in the top right hand corner of your screen.

This allows you to search for equipment in different ways. The 'Classification Type' drop down list will give you equipment options, but other fields can also be used.

## **Lab or blood products portering should be ordered using this process.**

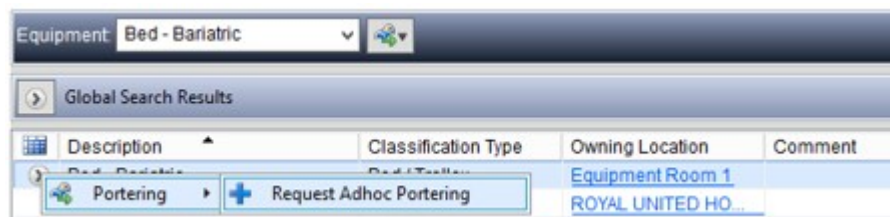
Select your equipment type from the classification list.



A dialog box titled 'Global Search Equipment Parameters' with a close button (X). It contains several input fields: 'Description', 'Classification Type' (a dropdown menu currently showing 'All Equipment Types'), 'Manufacturer', 'Lease / Not Leased' (a dropdown menu currently showing 'BOTH'), 'Model Number', 'Serial Number', 'Asset Control Number', and 'Badg ID'. At the bottom, there is a 'Clear' button, a checked checkbox labeled 'Search all facilities', and 'Cancel' and 'Search' buttons.

**Step 3.** Once you have selected your equipment click **Search**. This will fill the table below with equipment options.

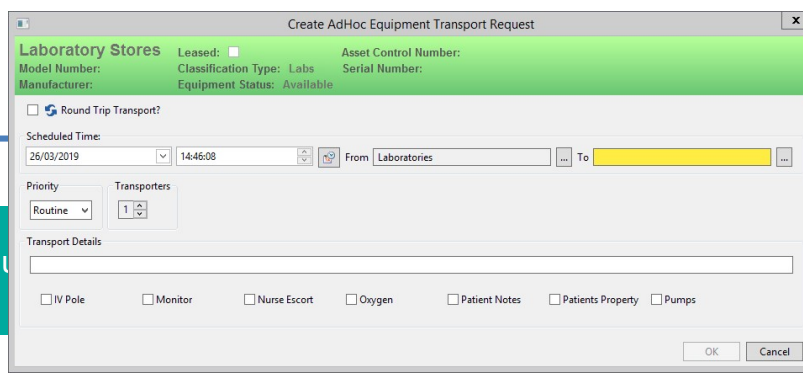
**Step 4.** Highlight the required equipment




A screenshot of the 'Global Search Results' window. At the top, there is a dropdown menu for 'Equipment' set to 'Bed - Bariatric'. Below it is a table with columns: 'Description', 'Classification Type', 'Owning Location', and 'Comment'. The first row shows 'Bed - Bariatric' under Description, 'Bed - Bariatric' under Classification Type, 'Equipment Room 1' under Owning Location, and 'ROYAL UNITED HO...' under Comment. Below the table, there are two buttons: 'Portering' (with a left arrow icon) and 'Request Adhoc Portering' (with a plus icon).

**Step 5.** Click the arrow in the left hand column and select **Portering** and then **Request Adhoc Portering**.

This will activate the **Create Adhoc Equipment Portering Request**.



A dialog box titled 'Create AdHoc Equipment Transport Request'. It has a green header bar with 'Laboratory Stores' and a green background. Below the header, there are fields for 'Leased' (checkbox), 'Asset Control Number', 'Model Number', 'Classification Type: Labs', 'Serial Number', 'Manufacturer', and 'Equipment Status: Available'. There is a checkbox for 'Round Trip Transport?'. Below that, there are fields for 'Scheduled Time' (26/03/2019, 14:46:08), 'From' (Laboratories), and 'To' (a yellow box). There is a 'Priority' dropdown (Routine) and a 'Transporters' spinner (1). Below that is a 'Transport Details' section with a text area and several checkboxes: 'IV Pole', 'Monitor', 'Nurse Escort', 'Oxygen', 'Patient Notes', 'Patients Property', and 'Pumps'. At the bottom are 'OK' and 'Cancel' buttons.

**Step 6.** Select the time and date for the Portering to occur.  
To select your location click the options  button to access the list of locations.

**Step 7.** Click on the arrow to the left of your desired location to expand the list. Continue to expand the list until the desired location is found and then select it.



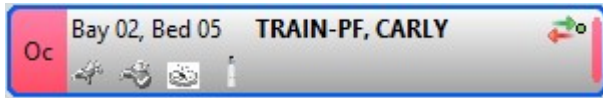
**Step 8.** Click **OK**.  
You will return to the Portering Request.


**Step 9.** Click **OK**.  
Your equipment request is complete and will now be sent to the Porters.

## Requesting an AdHoc Clean (Inpatient Area)

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**Step 1.** From the bed board find the bed you intend to request to clean. This will highlight the bed space with a blue border and is ready for your next action.



**Step 2.** Click the clean icon  above the bed board and select **Request Adhoc Clean**.



**Step 3.** The **Create AdHoc Housekeeping Request** box will appear for you to complete the cleaning details.

**Step 4.** Please indicate:

- Priority status.



- The number of domestics needed
- Provide as much information as possible in the **Adhoc Job Details** box to give the domestics additional information if necessary.
- Please schedule the date and time of the clean.

**Step 5.** Click OK. Your cleaning request is complete and will now be sent to the Housekeeping Team.

## Printing Wristbands & Labels

### Ad-Hoc Printing

**Step 1.** Open PMOffice from **Recap**

**Step 2.** In Pm Office select **Run Documents** from the top toolbar



**Step 3.** Select the **Find Patient**  button

**Step 4.** Enter the **Patient's Details**

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**IMPORTANT:** It is absolutely essential that you select the correct encounter from the list at the bottom of the search window.

**You MUST select the Inpatient encounter that has no Discharge Date.**

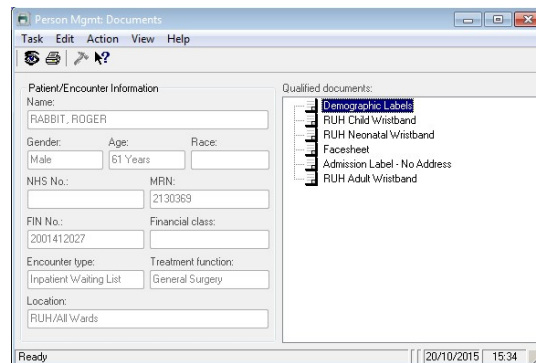
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**Step 5.** Click **OK**

**Step 6.** Select the **wristband, labels** or **facesheet**

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- Step 7.** Click the **Printer**  button
- Step 8.** Select the relevant printer.



- Step 9.** Click **OK**.

## Viewing Alerts

- Step 10.** In the patient's record in Powerchart click **Problems & Diagnosis** from the left menu.

**Note:** The problems pane is used for recording alerts (as well as clinical problems). What makes a problem an alert is selecting a flag in the classification field (e.g. patient preference flag).

**Note:** The Diagnosis is in the top part of the screen. The Problems / Alerts are in the lower part of the screen.