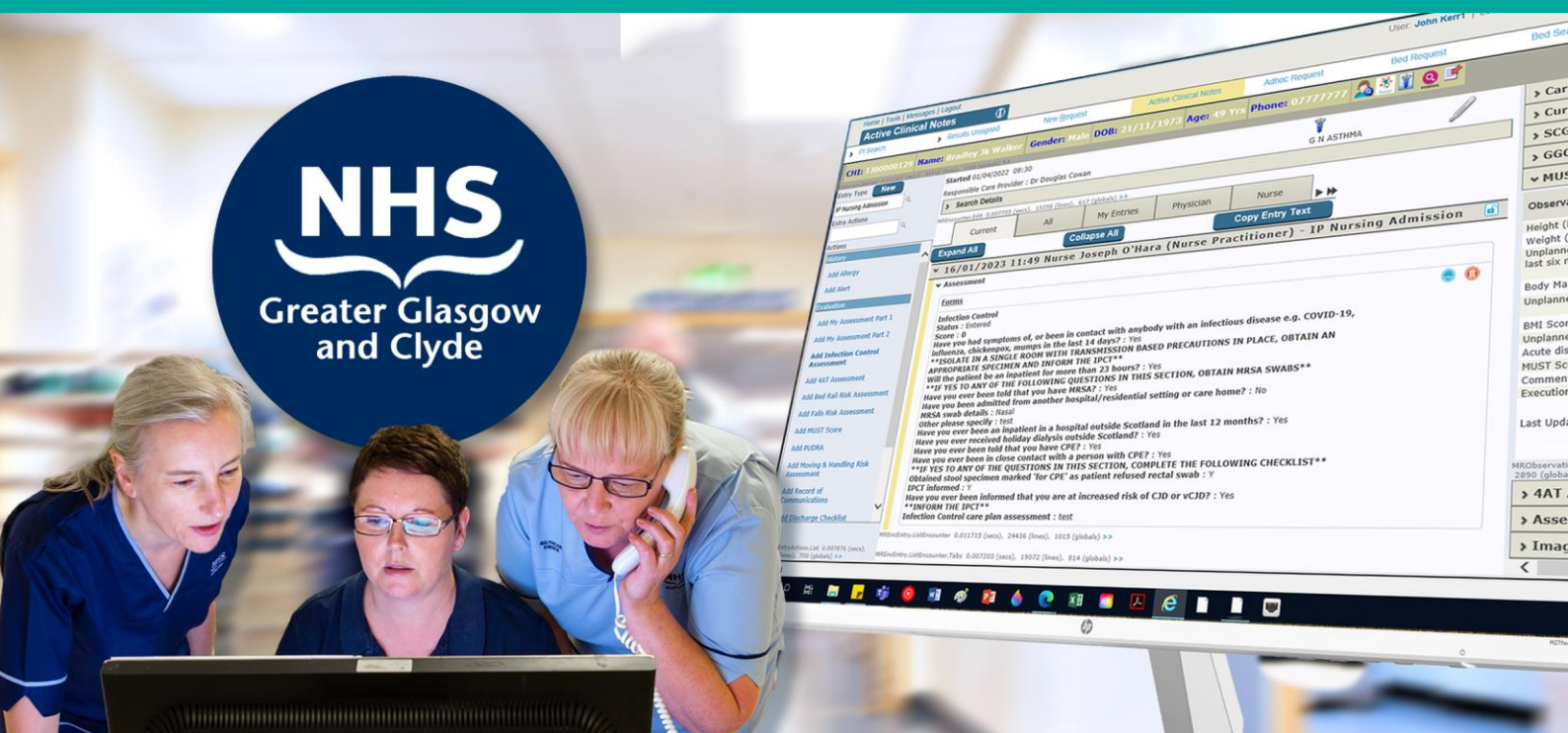


# Digital Clinical Notes



## USER GUIDE FOR NHSGGC STAFF

# Your TrakCare account

- Your **Username** and **Password** are exclusive to **YOU**
- After approximately **90 days** you will automatically be prompted to change your **password**
- However, you can change your password at **ANY** time by clicking your **Username** hyperlink at the top-right of the main **TrakCare** screen
- Do **NOT** allow any other person to use your logon details under **ANY** circumstances
- Inappropriate conduct – e.g. looking up confidential health records of patients that are NOT under your care or looking up your own records or those of your family, friends or neighbours, is strictly forbidden in all cases.
- All activity on **TrakCare** is closely monitored by eHealth using the intelligent ©FairWarning audit tool and disciplinary action can be taken if required.

## Accessing TrakCare

- Applications for new **TrakCare** accounts must be submitted by your line manager/ other via **My Account** (on **StaffNet**)
- Group training sessions are available for most NHSGGC staff groups on **MS TEAMS**. You must book to an appropriate course via **LearnPro**.
- If an appropriate training course is NOT listed on **LearnPro** then please submit your details via the **eHelp** icon on your desktop, providing as much detail as possible about your training requirements.
- **Please Note:** Many GGC departments and wards have nominated local staff as **TrakCare** super-users who can deliver training to colleagues. Please contact your line manager in the first instance to determine if training can be provided locally.





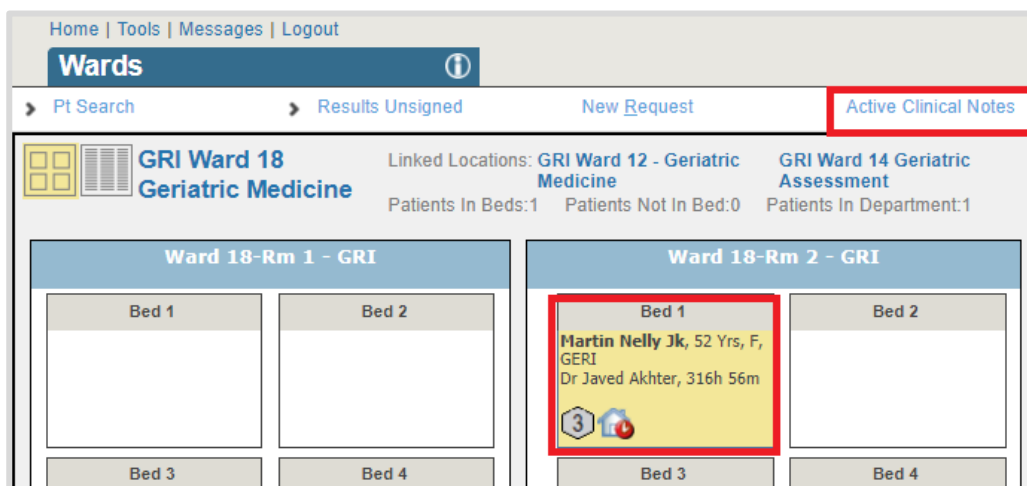
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## 1. About Digital Clinical Notes (DCN)

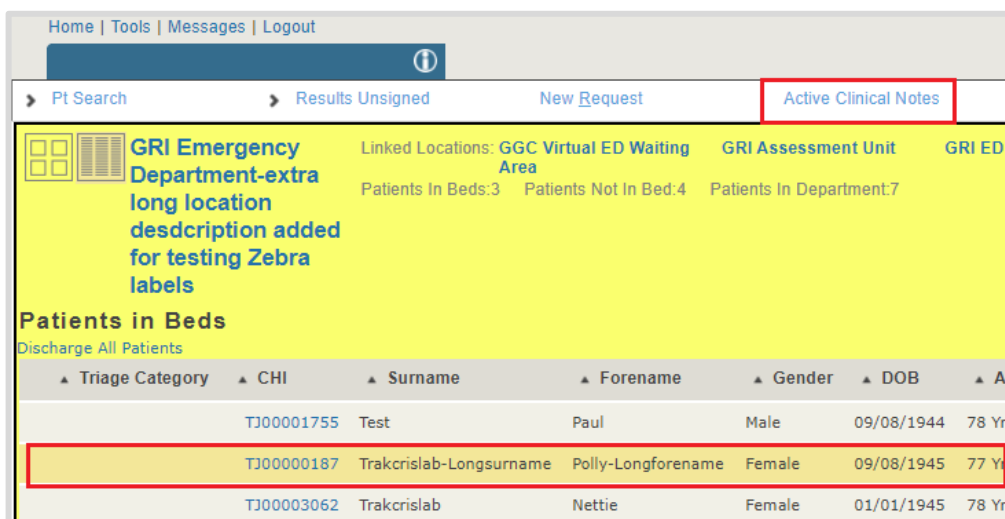
- The DCN workflow enables the recording of clinical notes on TrakCare; the DCN can include assessment forms, charts, free-text notes, medical illustrations and scanned documents – all easily accessed from a central location.
- Digital Clinical Notes can be recorded for **Inpatients**, **Emergency** patients and **Outpatients** from multiple areas of TrakCare.
- Notes can be viewed, added, and edited by GGC staff groups where appropriate.
- Each NHSGGC service that utilises DCN will have their own dedicated Digital Clinical Notes on TrakCare, the content of which should meet the requirements of the Department.

## 2. Launching Digital Clinical Notes for a patient

- a. From the **WARD FLOORPLAN**, select the relevant patient by clicking their details on-screen (to highlight them) and selecting the **Active Clinical Notes** option from the top of the screen (highlighted below):



- b. From the **ED PATIENT LIST**, select the relevant patient by clicking to highlight the patient's details and selecting the **Active Clinical Notes** option from the top of the screen (highlighted below):



- c. From the **CLINIC LIST**, select the relevant patient by ticking the checkbox and selecting the **Active Clinical Notes** option from the top of the screen (highlighted below):

<a href="#">Pi Search</a> <a href="#">Results Unsigned</a> <a href="#">New Request</a> <a href="#">Active Clinical Notes</a> <a href="#">Adhoc Request</a> <a href="#">CS Review</a> <a href="#">Episode Outcomes</a>													
PHYSIO-MSK: Physiotherapist QEUH ROT 4A MSK   PHYSIO-MSK: Physiotherapist QEUH ROT 8A MSK   <a href="#">Preferences</a>													
Clinic List													
Care Provider	Description	Clinic Location	Day	Date	Time From	Time To	Appointments Booked	Overbookings	Vacant	Attended	Did Not Attend	Message	Add/Edit Message
Physiotherapist QEUH ROT 8A MSK	SGR8AR578- PHYSIO QEUH ROT 8A MSK THURSDAY	Therapies Department Waiting Area A Ground Floor Queen Elizabeth University Hospital	Thursday	07/04/2022	09:30	16:30	2		21	0			
<input type="checkbox"/>		10:15	TJ81011014	Windsor-Ss	Emily	01/08/1981	Female	S N MSK	Slots=0		Arrived	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		10:30	TJ81010397	Simpson-Ss	Army	18/08/1987	Female	S R MSK	Slots=0		Arrived	<input checked="" type="checkbox"/>	

The **DIGITAL CLINICAL NOTES** workflow is launched.

- Before proceeding, and at all stages of the process, please check the demographic details that are displayed on the Patient Banner; always ensuring that the correct patient has been selected.

#### Actions List

Available forms, and other documentation that is specific to the patient's Specialty, will be listed here for completion, according to the **Entry Type** – e.g. *Nursing Daily Assessments, Paediatric Dentistry, etc.*

#### Digital Clinical Notes

All Digital Clinical Notes, as recorded by GGC staff, will be listed here.

#### Mini-Clinical Record

Contains additional sections that pertain to **DCN**. The **full** Clinical Record can be accessed as normal via the usual icon on the Patient Banner.



### 3. Digital Clinical Note tabs

<b>CURRENT</b>	The <b>unlocked</b> DCN that you are currently working on
<b>ALL</b>	<b>All</b> Digital Clinical Notes that have been recorded for the patient
<b>MY ENTRIES</b>	Only Digital Clinical Notes that <b>YOU</b> have recorded for the patient
<b>PHYSICIAN</b>	Digital Clinical Notes entered by <b>Clinicians</b>
<b>NURSE</b>	Digital Clinical Notes entered by <b>Nursing staff</b>
<b>ANCILLARY</b>	Digital Clinical Notes entered by other <b>Healthcare Professionals</b>

### 4. Completing a full DCN entry for a NEW patient

This process will vary for respective specialties but, in most cases, new patients to a service will usually be required to have a minimum number of forms completed at the time of their initial first appointment.

- Each time a form is selected and completed from the Actions List (left-hand section) it will be displayed in the Entry (middle section) with the most recently completed entry will appear at the top – showing Date, Time and Author details.

**Please follow these steps to commence a new Digital Clinical Note:**

- At the **Entry Type** field – click the spyglass and select the appropriate option from the popup list
- Click **New** button

The **Actions List** for that specific **Entry Type** will be displayed down the left-hand side of the screen – as can be seen on the example show here:

**DCN Entry Type**  
This must be selected in the first instance, before clicking **NEW**.

**Actions List**  
Blank forms and templates, that are pertinent to the patient's specialty of care, will be listed.

**DCN Entry**  
This banner will appear whenever a new Digital Clinical Note is commenced.  
*If generated in error it should be deleted via the **trashcan** icon.*

## a. Completing a DCN form

The majority of forms, which will be unique to each service, follow a similar design and are broken into separate sections consisting of **mandatory** and **non-mandatory** text entry fields (either free-text or spyglass options).

■ **Note:** Additional text entry fields will open in response to specific questions being answered – e.g. **YES** or **NO** when asked: *“Do you have a diagnosis of Diabetes?”*

Once all information, including free-text comments, has been added to the required form, special attention must be paid to the **Status** section at the bottom of the document:

## b. Status descriptions

<b>Authorised</b>	Form is <b>complete</b> and rendered <b>Read Only</b> .
<b>Entered</b>	Form is populated but <b>can be edited further if required</b> .
<b>Corrected</b>	Form has been revised; <b>Reason for Correction</b> can be used to update a form where the Status is <b>AUTHORISED</b> or <b>CORRECTED</b> .

Completed forms for the current DCN will be highlighted in **BOLD** on the **Actions** list (as shown on the example below):


## c. Adding Clinical Observations to a Digital Clinical Note

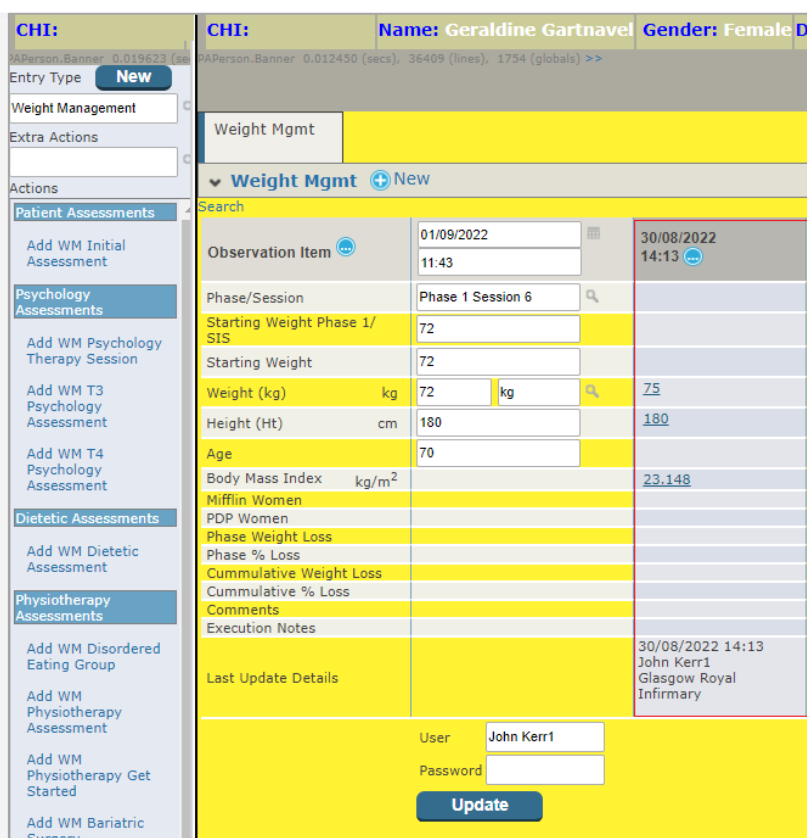
Clinical observations can be added to a Digital Clinical Note, where necessary, and these will be viewable on the full Clinical Record in addition to the Clinical Note itself.

■ Obs can be added in **TWO** ways:

1. via the **Thermometer** icon
2. via the **Actions** list (where applicable)

### Adding Obs via the Thermometer icon:

- With the DCN screen open, click the **Thermometer** icon  at the top-right of the screen
- The **Observations** chart will open and any existing obs will be displayed to the right of the fresh chart
- Complete all mandatory and other relevant fields before clicking **UPDATE** to save



**CHI:** **Name:** Geraldine Gartnavel **Gender:** Female **DOB:** 01/09/2022

Entry Type **New**

Weight Management

Extra Actions

Actions

**Weight Mgmt** **New**

Observation Item	01/09/2022	30/08/2022
Phase/Session	Phase 1 Session 6	
Starting Weight Phase 1/ SIS	72	
Starting Weight	72	
Weight (kg)	72 kg	75
Height (Ht)	180 cm	180
Age	70	
Body Mass Index	kg/m <sup>2</sup>	23.148
Mifflin Women		
PDP Women		
Phase Weight Loss		
Phase % Loss		
Cumulative Weight Loss		
Cumulative % Loss		
Comments		
Execution Notes		
Last Update Details		30/08/2022 14:13 John Kerr1 Glasgow Royal Infirmary

User: John Kerr1

Password:

**Update**

### Adding Obs via the ACTIONS list:

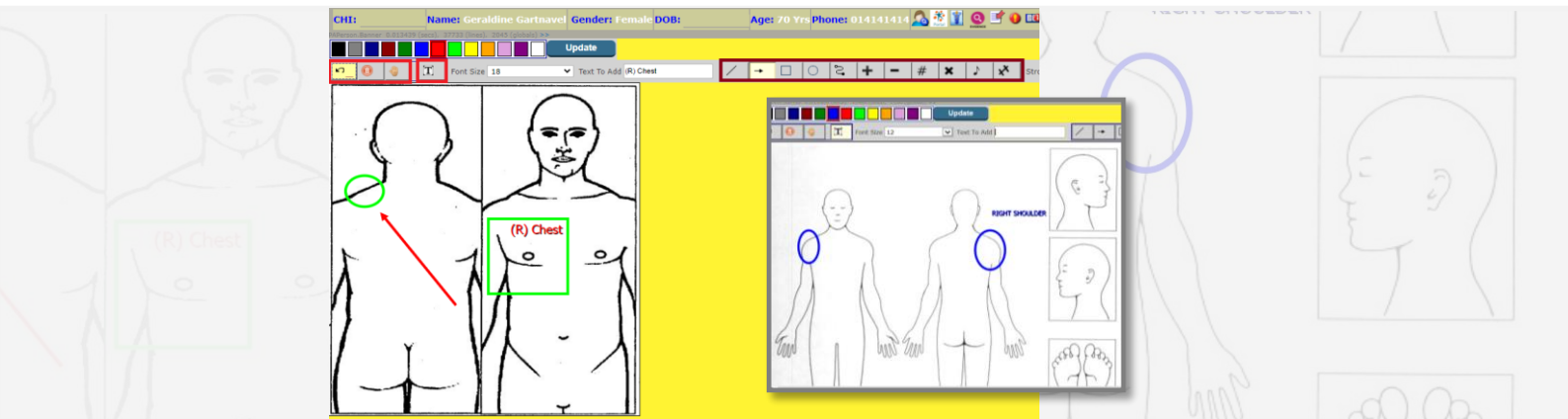
- With the DCN screen open, select the appropriate option from the **Actions** list
- The **Observations** chart will open on the right; any existing obs will be listed
- Complete the new chart, again recording all mandatory information and other relevant details
- Click **APPLY** button to auto-generate BMI, etc.
- Click **UPDATE** to save



## d. Adding Medical Images and Annotations to a Digital Clinical Note

As a replacement for paper-based forms, medical images with annotations and comments can be recorded and incorporated into a DCN via the **ADD ANNOTATIONS** link that is located in the **Actions List**.

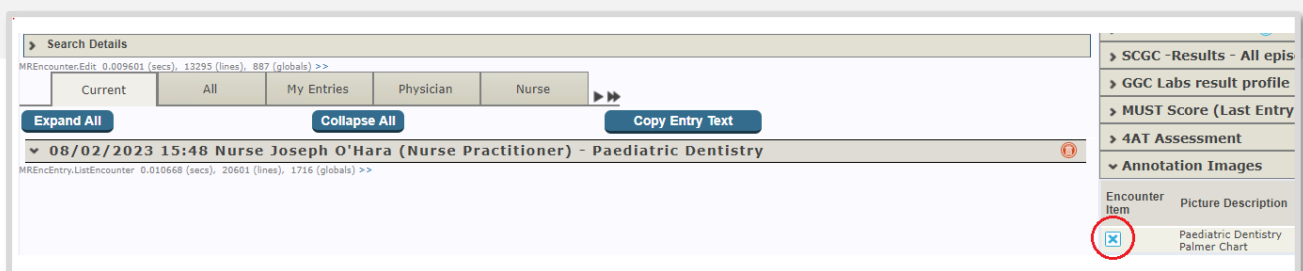
- Click the **Add Annotations** link to open the list of available options
- Select the required form – e.g. *Chest Injury, Paediatric Dentistry Palmer Chart, etc.*
- Areas of the head/body can be highlighted using the text and drawing tools – i.e. rectangles, ellipses, arrows, etc. The colour of the lines and text can be changed.



### Adding outlines, arrows and text to the Annotation

- Click onto the relevant section of the **Annotation** image and drag the mouse to display the shape. [You can click the **Undo** icon to remove and then re-enter the shape].
- To reposition the inserted shape, select the **Hand** icon, click on the shape and drag with the mouse to the correct position. Proceed to insert another shape if required.
- To delete a shape or text, select the **Hand** icon, select the shape/text you want to delete and click the **Delete** icon.
- Click the **TEXT** icon, select the required type size/colour and enter the relevant text into the **Text to Add** field.
- Click onto the relevant section of the body map and drag the mouse to display the text. [You can click the **Undo** icon to remove and then re-enter the shape or select **Delete**].
- Click the **Update** button at the top of the screen to save the completed diagram.
- The completed annotation image will automatically be added to the **current** Active Clinical Note.

■ **NOTE:** Annotations from previous Digital Clinical Notes can be copied into new **Current** notes by clicking the **Encounter Item** icon found beside the image details in the mini-Clinical Record, as circled on the example shown below:



## e. Scanning and uploading files to a Digital Clinical Note

Image files and documents can be added to a DCN via the **SCANNED EPR DOCUMENTS** section of the mini-Clinical Record.

■ **NOTE:** Text documents and images can be uploaded to the Digital Clinical Note.

- Click to open the **Scanned EPR Documents** tab
- Click the **NEW** button

- Enter a free-text **DESCRIPTION** of the upload
- Enter a **DOCUMENT TYPE**, selecting a relevant option via the spyglass – e.g. *Miscellaneous*
- Click the **BROWSE** button to locate and select the file you wish to upload from your PC/Laptop
- Click **UPDATE** button to finish

The document that you have added will now be visible to all users via the **Scanned EPR DOCUMENTS** tab.

■ **NOTE:** Scanned/uploaded documents will **NOT** be shown in the middle pane/main Digital Clinical Notes area.

- To view attachments, click the **Path** number link – shown on the example below:

Scanned EPR Documents				
New				
Description	Path	Document Type	Last Update User	Date Created
Patient Referral	21130	Referral	John Kerr1	31/01/2023
John Kerr1 16/01/2023				
MRPictures.ListEPR 0.002496 (secs), 9033 (lines), 341 (globals) >>				
Image - Unrep Requests				

## f. Deleting a scanned file/document

- Click the **Path** number link
- Click the **DELETE** button – as highlighted here:

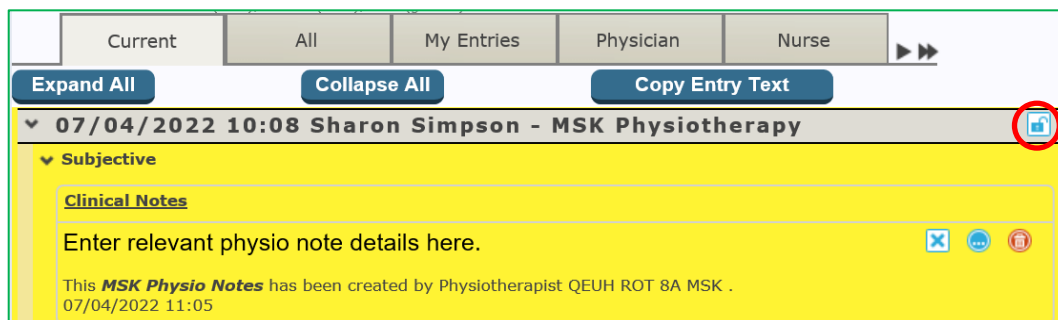
Last Update Date	25/10/2022
Last Update Time	11:50
Last Update User	John Kerr1
Last Update Hospital	Glasgow Royal Infirmary
<div> <div>Delete</div> <div>Update</div> </div>	

## g. Locking a Digital Clinical Note

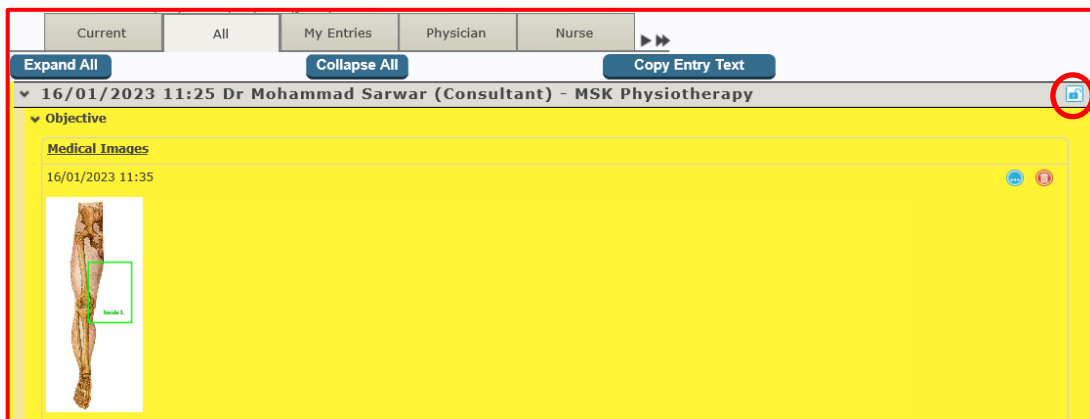
Once you are **finished recording data** for a specific patient you must **LOCK** the entry. Even if you are not finished and wish to return after an interruption, it should still (in most cases) be locked; it simply means you are finished with it, for the moment.

- You have the ability to create as many entries as required to contribute more data to the patient's record.
- On locking, a **DATE** and **TIME-STAMP** as well as **YOUR** name as the author, will be recorded.
- Multiple GGC staff can continue to add to the patient's record through DCN following the same process - i.e. opening, completing, saving and locking their specific entries.
- Unlocked entries will continue to appear under the **CURRENT** tab in the main DCN part of the screen.
- When locked, entries will **NOT** be available under the **CURRENT** tab but will be accessible via both the **ALL** and **MY ENTRIES** tabs respectively. The **ALL** tab can be used during return appointments if you are required to check previous notes.

■ **Unlocked DCN** – still accessible from the **CURRENT** tab – with opened date and time displayed with author's name:



■ **Locked DCN** – only accessible from the **ALL** and **MY ENTRIES** tabs with opened AND closed date and time displayed with author's name:



## 5. Editing Digital Clinical Note entries

You can return to, and edit, a completed Digital Clinical Note from the Ward Floorplan, ED Patient List and Outpatient **Clinic List** in addition to the **Pt Activity** tab.


- ↳ **From the Ward Floorplan** – select the patient's details and click **Active Clinical Notes** tab
- ↳ **From the ED Patient List** – select the patient's details and click **Active Clinical Notes** tab
- ↳ **From the Clinic List** – select the relevant patient by ticking the checkbox and clicking **Active Clinical Notes** tab
- ↳ **From Pt Activity** – search using CHI/etc., select relevant care episode from the list and click **Active Clinical Notes** tab.

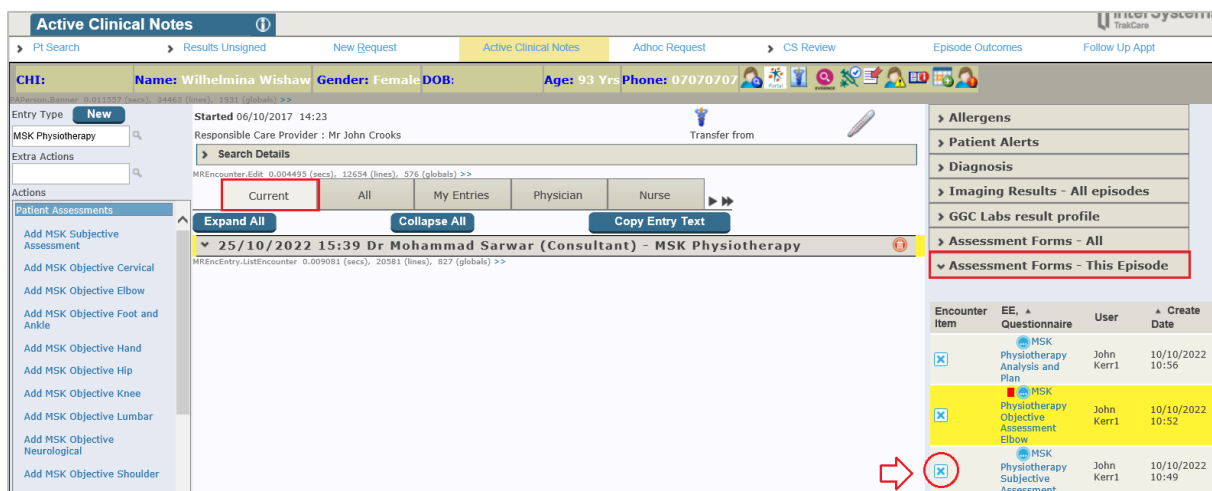
■ **NOTE:** Please take care to select the **CORRECT** episode of care from the **PT ACTIVITY** list.

For the following example the patient will be selected from the **Clinic List** before adding additional information to a DCN form; the form in question has a Status of **AUTHORISED** and has been **PADLOCKED** – as per the normal process.

- The patient details are selected from the **Clinic List**
- Select the **Active Clinical Notes** tab to launch **DCN**
- Select the appropriate **Entry Type** – e.g. *Nursing Daily Assessments; Paediatric Dentistry, etc.*
- Click **NEW** button


This launches a new, blank Digital Clinical Note for the selected patient in the **CURRENT** tab.

- From the mini-Clinical Record, select **Assessment Forms – This Episode**
- Identify the relevant form that is to be copied into the new DCN
- Click the  to copy the **entire form** to the **Current** DCN – as circled on the example shown below:



Encounter Item	EE, Questionnaire	User	Create Date
<input checked="" type="checkbox"/>	MSK Physiotherapy Analysis and Plan	John Kerr1	10/10/2022 10:56
<input checked="" type="checkbox"/>	MSK Physiotherapy Objective Assessment Elbow	John Kerr1	10/10/2022 10:52
<input checked="" type="checkbox"/>	MSK Physiotherapy Subjective Assessment	John Kerr1	10/10/2022 10:49

The copied form will be embedded in the current Digital Clinical Note.

- Click  to open the form for editing
- The form will open in a split-screen format

- In the example [shown below] we are required to add more information to the **Subjective Assessment** form for the MSK Physiotherapy service – but this process will be the same for **ANY** form used by **ANY** GGC service.

■ **NOTE:** If the form you wish to edit has a **Status** of **AUTHORISED** then it is **read-only**; the **Status** must be updated to make the form editable.

### a. Editing an Authorised form

- Scroll to the bottom of the form  
 → In the **Reason for Correction** field select an appropriate open – e.g. **Additional Information**  
 → The form will now be editable; all fields will be active and further details can be added

■ **NOTE:** Do **NOT** complete the **Error Reason** field. This should be left **BLANK**. However, if you have entered details on the **WRONG** patient's record, different steps should be followed. Please refer to the **Troubleshooting Guide** for these.

**Proceed to add/edit the contents of the form, as required.**

The original **Status** value will be retained before you click **Update** – e.g. if the form's **Status** was **Authorised**, as per the above example, then it will remain at **Authorised** after you have edited the details.

- Your password must be entered before you click **UPDATE** or **APPLY**  
 → The **Status** on the completed form will now be set to **Corrected** – as shown below:

Status	Corrected	
User	John Kerr1	Update
Password		Preview
		Apply
		Print



If no further changes are required to be made, the **Digital Clinical Note** should be **LOCKED** by clicking the open padlock icon



**Reminder:** When a Digital Clinical Note is locked, it no longer appears under the **CURRENT** tab; it can now be accessed via the **ALL** tab where it will be displayed at the top of the main pane with the newly added information and the **Status** showing as **Corrected**.

■ **NOTE:** The original DCN entry will **ALSO** be displayed but will be outlined by a pink border. This indicates that the form in question has been amended and that the text shown may not display the latest version of this information – as per the example below:

06/09/2022 13:42 - 06/09/2022 13:51 Dr Mohammad Sarwar (Consultant) - MSK Physiotherapy

▼ Assessment

**Forms**

**MSK Physiotherapy Subjective Assessment**  
 Status : Authorised  
 Assessing Clinician : Dr Mohammad Sarwar

Attendance Policy Explained : Yes  
 Interpreter present : Yes  
 Presenting Condition : test  
 History and Management : test  
 Numeric Pain Rating Scale (NPRS) : 4  
 Investigation Undertaken

Patient Specific Functional Scale (PSFS) : 4  
 Additional Falls Questions  
 Medication

Work Status (Initial Assessment) : At work and struggling or reduced duties due to complaint  
 Yellow Flags Details

The text may not display the latest version of this information.



## 6. Information for Qualified Staff, Students and Healthcare Support Workers when completing Digital Clinical Notes

### a. A specific process must be followed firstly by Student/HCSW staff when completing Digital Clinical Notes.

- 1 Students/HCSW staff will complete all required details and must enter a status of **AUTHORISED** at the end of the form
- 2 They will then click the **APPLY** button
- 3 An appropriate **REASON FOR CORRECTION** must then be recorded - i.e. **Entered by Student** or **Entered by HCSW**
- 4 Enter **Password**
- 5 Click **UPDATE** button to finish

### b. Qualified Staff must THEN be informed by the Student/HCSW that a Digital Clinical Note is now required to be countersigned.

→ To countersign, **ALWAYS CREATE A NEW ENTRY** via the **NEW** button.


■ **NOTE:** The DCN that has **ALREADY** been completed by the Student/HCSW will be located in the mini-Clinical Record at the right-hand side of the screen.

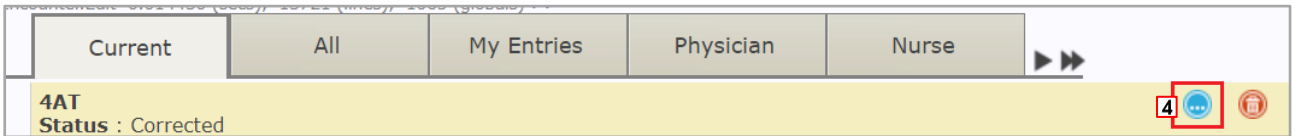
→ This must be **COPIED** into the new DCN entry in order for it to be countersigned.

- 1 Select the relevant **Entry Type** via the spyglass
- 2 Click **NEW** button to open a new Digital Clinical Note

■ **NOTE:** It is only possible to **COPY** a previous DCN from the mini-Clinical Record when a **NEW** DCN is launched and the  icon appears beside the item that is to be copied.

- 3 Click the  displayed left of the form's details (in the mini-Clinical Record) to copy it

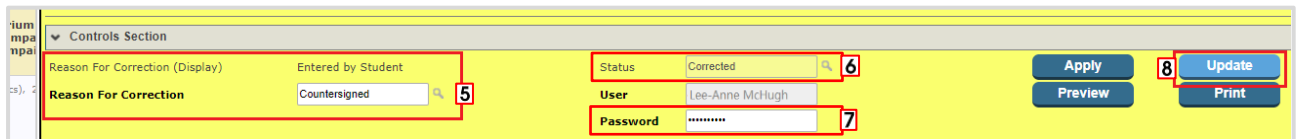
- 4 Click the **EDIT ENTRY ITEM** icon on the copied  to re-open it for countersigning



→ Scroll down to the bottom of the form ...

5. At **REASON FOR CORRECTION** field, select a value of **COUNTERSIGNED**

The form now becomes **EDITABLE** and its contents can be checked and verified by the Qualified Staff.



6. The **Status** updates to **CORRECTED**
7. Enter **Password**
8. Click **UPDATE** button to complete

## What is the meaning of a pink border that is displayed around a form's contents?

There can be TWO reasons why a pink border is displayed (as shown on the example below):

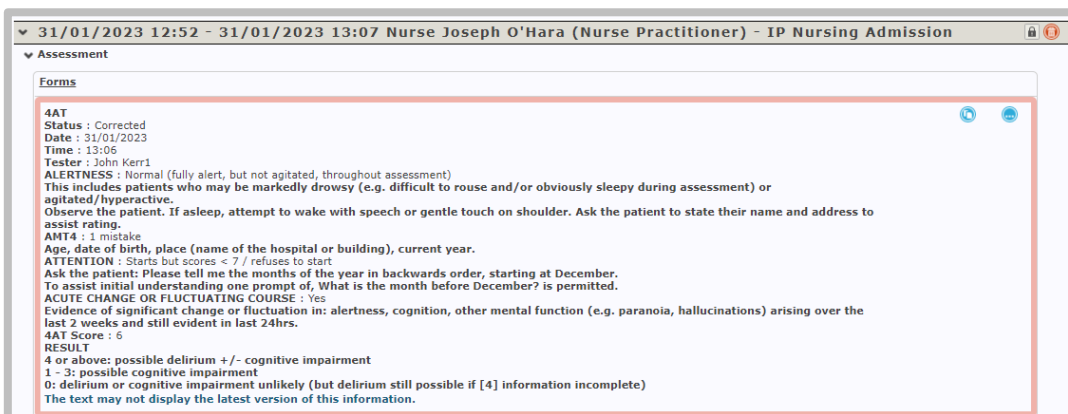
1. Qualified Staff have countersigned a form that has been completed by Student/HCSW Staff, as per local procedure

OR

2. Changes have been made to the content of the form – e.g. additions or corrections.

This means that the form that is outlined in pink MAY NOT display the latest version of this information.

**NOTE: The updated version will be displayed further up the chronology of the Digital Clinical Note.**



## 7. Viewing and Searching Digital Clinical Notes on TrakCare

Once a Digital Clinical Note has been completed it can easily be viewed, and searched, as follows:

### a. Via DCN workflow

- From the **Ward Floorplan** view
- From the **ED Patient List** view
- From the Outpatient **Clinic List**, by clicking the checkbox beside the relevant patient
  - Click **Active Clinical Notes** tab
  - Select the relevant tab in the main DCN section – remember all padlocked entries will be listed under the **ALL** and **MY ENTRIES** tabs.
  - There is also a robust search facility available; click **Search Details** to reveal the search fields. You can search by **date**, across all **patient encounters** and by **keyword(s)**, e.g. *Red Flags*

■ **NOTE:** If an entry has **NOT** been **LOCKED** by the author then this will impact on any date-range searches that are conducted using **Search Details** as the real-time date and time will not have been added to the Form.

- Click **COLLAPSE ALL** button to minimise all DCN entries; you can then open a specific entry if there are multiple available [see example below]
- Click **EXPAND ALL** button to re-open all entries

## b. Viewing Digital Clinical Notes via the patient's Clinical Record


- From the **Ward Floorplan** view, hover over the patient's details and click the **Clinical Record** icon
- From the **ED Patient List** view, click the **Clinical Record** icon
- From the **Clinic List**, click the relevant patient's **Clinical Record** icon

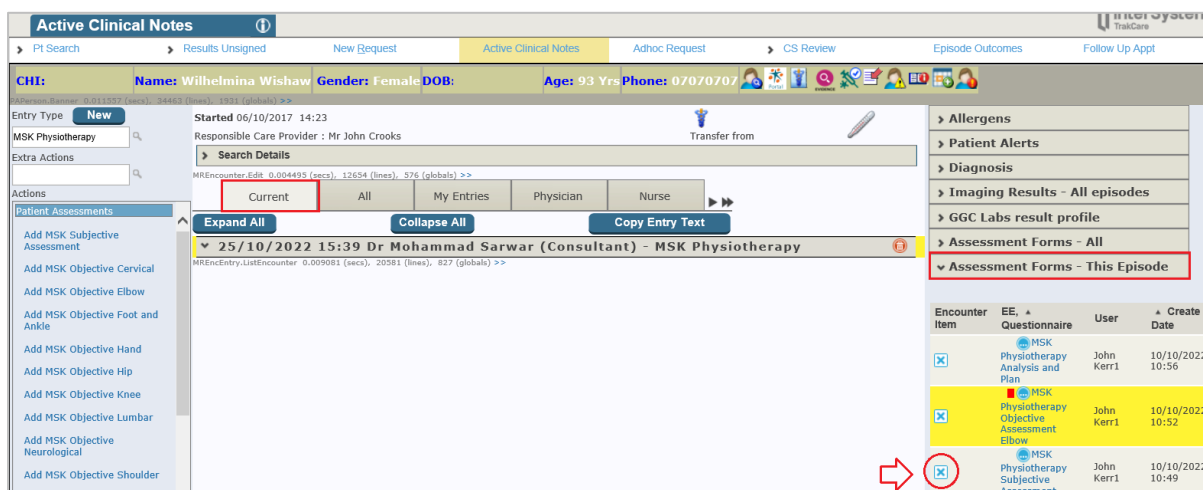
**You will find DCN documentation and notes under these specific tabs in the Clinical Record:**

<b>Clinical Assessment &gt; Clinical Notes</b> tab	Free-text notes such as <b>Nurse Note</b> , <b>Doctor Note</b> , etc.
<b>Clinical Assessment &gt; Questionnaire</b> tab	All completed Assessment forms
<b>Documents</b> tab > <b>Scanned EPR Documents</b> tab	All scanned documents that have been attached to the patient's DCN record
<b>Documents</b> tab > <b>Annotation Images</b> tab	All medical images with text and annotations




## 8. Copying existing Forms, etc., into a new DCN

The DCN functionality allows existing Assessment Forms and other information to be copied from the mini-Clinical Record into a new Digital Clinical Note – i.e. the forms are then embedded into the body of the new DCN and viewable in the same context as other new content.

- From the mini-Clinical Record, select **Assessment Forms – All**
- Identify the relevant form that is to be copied into the new DCN
- Click the  to copy the **entire form** to the **Current** DCN – as circled on the example shown below:



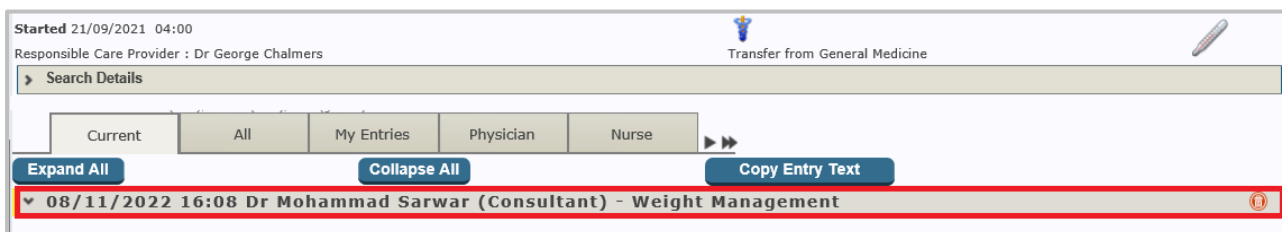
The screenshot shows the 'Active Clinical Notes' interface for patient Wilhelmina Wishaw. The 'Current' tab is selected. The 'Assessment Forms - This Episode' section is expanded, showing a table of assessment forms. A red box highlights the 'Copy Entry Text' button. A red arrow points to the copy icon in the table row for 'Physiotherapy Subjective Assessment'.

Encounter Item	EE, Questionnaire	User	Create Date
	MSK Physiotherapy Analysis and Plan	John Kerr1	10/10/2022 10:56
	MSK Physiotherapy Objective Assessment Elbow	John Kerr1	10/10/2022 10:52
	MSK Physiotherapy Subjective Assessment	John Kerr1	10/10/2022 10:49

## 9. Removing DCN Entry headings that are not required

Each time you launch a new Digital Clinical Note an entry heading is generated.

This header displays **Date**, **Time**, **Author** and **Service** - as shown below. This information is important as it allows you to search TrakCare for a specific Digital Clinical Note using date, time, author, etc.



The screenshot shows the DCN entry heading for a new entry. The entry is highlighted with a red box. The entry text is: **08/11/2022 16:08 Dr Mohammad Sarwar (Consultant) - Weight Management**.

If a DCN entry is created by **YOU** in error, or is simply no longer required, and no data has been recorded - it is good record-keeping practice to delete them as they could easily increase in number and take up screen-space and cause confusion.

- Simply click the **delete** icon to remove 

■ **Note: Only delete entry headings that have been generated by YOU, no-one else.**

