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## Patient Overview App Quick Reference Guide



The **Patient Overview** app is aimed at simplifying the workload of reception and administration staff. It provides a range of functionality within a single module enabling the management of multiple patient requests for a selected patient in one place, where as in the past you would have had to access various Vision modules. The Patient Overview App can be accessed from either:

- **Apps Controller**, or
- **Consultation Manager - Apps**

Add patient photo if required  
 Miss) Born 15-Jan-1995 (19y) Gender Female NHS No. 922 386 4291  
 LYN, BODDFORDD, PRESTATYN, LL77 7EJ Email:

Patient Overview  
 (Empty) Summary [Ctrl+S] Demographics, Contacts, and Preferences [Ctrl+D]

Summary and Demographics, Contacts and Preferences tabs

Patient Overview information is displayed here

**Future Appointments**  
 Wed 10th Dec 2014 with CLINIC at 2:30 PM (10 minutes) Dressing change  
 Wed 17th Dec 2014 with CLINIC at 2:40 PM (10 minutes) Dressing change  
 Thu 18th Dec 2014 with Dr Dave Keighley at 9:20 AM (10 minutes) Check up

**Outstanding tasks for patient**  
 Reauthorise Repeats Due: 11/12/2014 Assigned by: E Hopper on 10/12/2014

**Current Medication**

- Repeat Ambrisentan 10mg tablets Last issued: 25/07/2014 Issued: 1 maximum 6 allowed Supply: ( 30 ) tablet 1 TABLET ONCE DAILY Dr Sean Spencer
- Repeat Salbutamol 100micrograms/dose breath actuated inhaler CFC free Last issued: 25/07/2014 Issued: 2 maximum 8 allowed Supply: ( 200 ) dose 1 TO 2 PUFFS UP TO FOUR TIMES DAILY
- 25/07/2014 Atenolol 25mg tablets Supply: ( 28 ) tablet 1 TABLET ONCE A DAY Dr Sean Spencer
- 25/07/2014 Bezafibrate 200mg tablets Supply: ( 84 ) tablet 1 THREE TIMES DAILY Notes for dispenser: Blah Blah Notes for patient: Blah Blah Blah Dr Sean Spencer
- 02/07/2014 Amoxicillin 250mg capsules Supply: ( 21 ) capsule 1 CAPSULE THREE TIMES A DAY Dr Sean Spencer
- 02/07/2014 Amoxicillin 250mg capsules Supply: ( 21 ) capsule 1 CAPSULE THREE TIMES A DAY Dr Sean Spencer

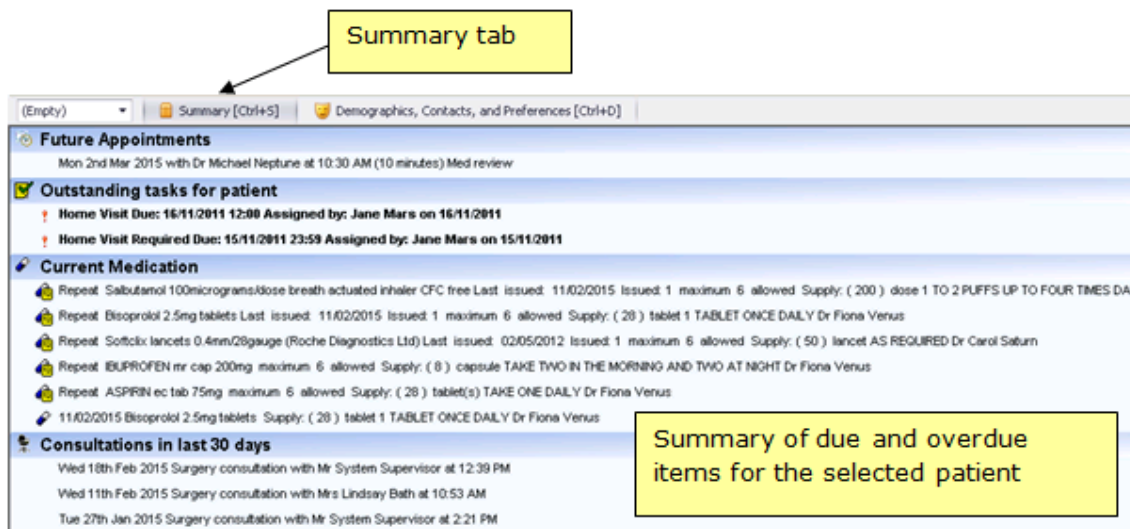
Patient Overview



It comprises the following tabs:

- **Summary Tab** (page 3)
- **Demographics, Contacts and Preferences Tab** (page 6)

## Summary Tab



### Summary tab

The **Summary** tab provides a summary view of the following patient data where available:

- **Reminders** - Displays all patient reminders. Right-mouse click on a reminder for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.
  - **Cancel** - Select to cancel the selected reminder.
  - **Edit** - Select to edit the selected reminder.
  - **Add Manual Reminder** - Select to add a new manual reminder.
- **Prescription Notes** - A sub-category of reminders. Right-mouse click on a reminder for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.
  - **Cancel** - Select to cancel the selected prescription note.
  - **Edit** - Select to edit the selected prescription note.
  - **Add Manual Reminder** - Select to add a new manual prescription note.
- **Future Appointments** - Displays all future appointments for the patient. Right-mouse click on an appointment for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.
  - **Cancel Appointment** - Select to cancel the appointment, you are prompted for a cancellation reason.

- **Reschedule Appointment** - Select to move an appointment. The Book Appointment screen is displayed, select a slot and the original appointment is cancelled with the 'moved to another slot' and a new appointment created.
- **Make New Appointment** - Select to make a new appointment for the selected patient.
- **Outstanding Tasks for Patient** - Displays all outstanding Daybook tasks for the currently selected patient, irrespective of assignment. Right-mouse click on a task for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.
  - **Open Task** - Select to open the Daybook task ready for actioning.
  - **Add New Task** - Select to add a new task for the selected patient.
- **Incoming Mail in Last 60 Days** - Displays all incoming Mail Manager messages in the last 60 days along with any associated actions. Unread messages and outstanding actions are displayed in bold. Right-mouse click on an item for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.
  - **Edit Action** - Select to edit the action.
  - **Complete Action** - Select to complete an incomplete action.
  - **Mark as Incomplete / Complete Action** - Select to revert a previously complete action back to outstanding or complete an action.
  - **Add Action** - Select to add a new action to the message.
  - **Launch Mail Manager** - Select to launch Mail Manager.
- **Current Medication** - Displays all active repeats and acutes issued in the last 6 months. Active but expired repeats are shown in grey. There are no right-mouse menu options available for Current Medication, but



you can use **Open Therapy Record** from the Apps Controller toolbar to access the patient's therapy.

- **Consultations in Last 30 Days** - Displays all practice consultations in the last 30 days with the exception of the following consultation types:

**Administration**

**Day Case Report**

**GOS18 Report**

**Letter from Outpatients**

**Mail to Patient**

**NHS Direct Report**

**Results Recording**

**Casualty Attendance**

**Discharge Details**

**Hospital Admission**

**Mail from Patient**

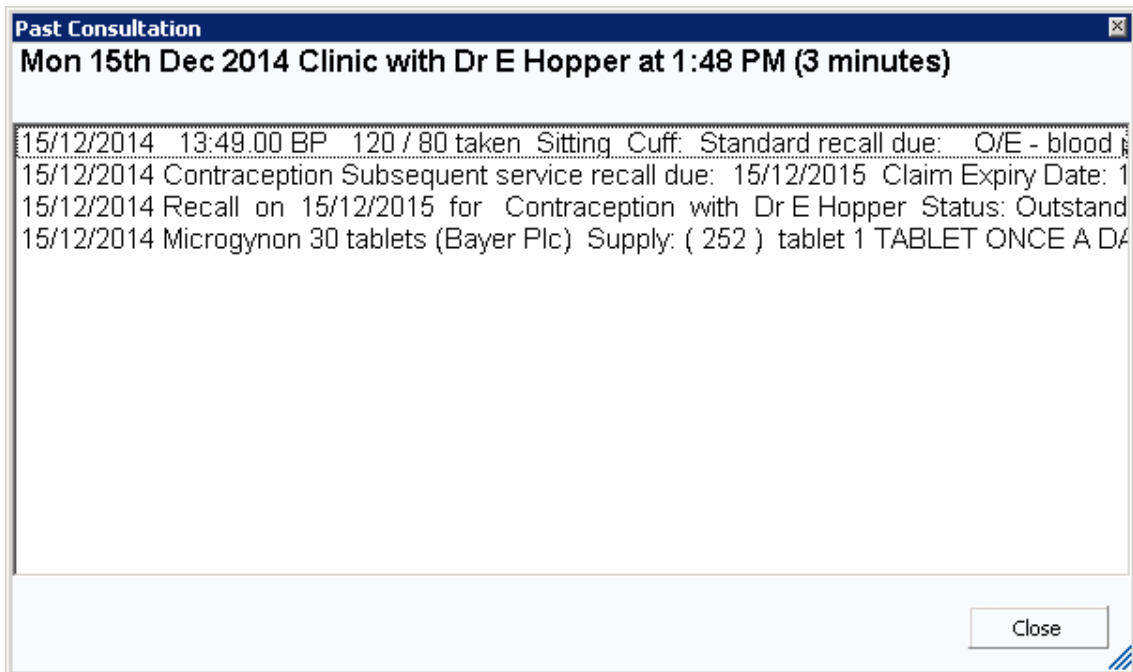
**Medicine Management**

**Other**

- Right-mouse click on an item for the following options:
  - **Refresh** - Select to refresh the Patient Overview screen.



- **View** - Displays the content of the selected consultation:



**Past Consultation** ✕

**Mon 15th Dec 2014 Clinic with Dr E Hopper at 1:48 PM (3 minutes)**

15/12/2014 13:49:00 BP 120 / 80 taken Sitting Cuff: Standard recall due: O/E - blood  
15/12/2014 Contraception Subsequent service recall due: 15/12/2015 Claim Expiry Date: 1  
15/12/2014 Recall on 15/12/2015 for Contraception with Dr E Hopper Status: Outstand  
15/12/2014 Microgynon 30 tablets (Bayer Plc) Supply: ( 252 ) tablet 1 TABLET ONCE A DA

*Past Consultation*

## Demographics, Contacts and Preferences Tab

The **Demographics, Contacts and Preferences** tab displays demographic, contact and preference information for the selected patient.

**Demographic information**

Surname	HABGOOD	Sex	Female
Forename1	JOAN	Date of Birth	26/11/1978
Forename2	MARGARET JANE	Marital Status	Unknown
Previous Surname	BEARD	Date Applied	28/04/2009
Title	MRS	Date Accepted	28/04/2009
Reg. Status	Permanent	Registration	Living
Registered GP	Dr Jane Mars	GP	Dr Trainee Gp
CHI No.	230823907	S No	prev
Notes Kept At:		Additional Identifier	10526

Address: 171, PRIVETT ROAD, LEEDS, Z99 9ZZ

**Contacts for main address**

Telephone - home: 01015011111  
Mobile phone: 0208123123

**Contacts for patient**

Telephone - home: 02075017100  
Telephone - home: patient  
Mobile phone: 07845111222

**Family members**

SHALIN, Brian (Mr) 18/12/1977  
HABGOOD, Zernie (Mr) 12/12/1958  
DANIEL, Susan (Miss) 01/02/2013  
HABGOOD, Zethel (Ms) 01/01/2000  
HABGOOD, Kerry (Ms) 12/12/1923

**Carers/Contacts**

Next of Kin: HABGOOD, Katherine (Ms) 05/09/1905 [Next of Kin]  
Next of Kin: GABRIEL, Owen (Mr) 09/01/1924 [Next of Kin]

**Additional demographic and preference information is displayed and can be added**

**Access Information**

02/12/2014 Patient door access key code 14135 Mr System System Supervisor  
10/11/2014 Key Holder Mr System System Supervisor  
27/02/2013 Key Holder Mrs Jenkins next door (173) Dr Jane Mars

**Other Agencies Involved**

12/03/2013 Home help organised Mr System System Supervisor  
12/03/2013 Voluntary worker Mr System System Supervisor  
27/02/2013 Domiciliary services Dr Jane Mars  
27/02/2013 Domiciliary services Dr Jane Mars

**Language(s) Spoken**

10/11/2014 Language Spoken: Bilingual (Welsh/English) Preferred: No Dr Carol Saturn  
10/04/2014 Language Spoken: Akan (Ashanti) Preferred: No Dr Fiona Venus

**Language(s) Read**

10/04/2014 Language Read: Bilingual (Welsh/English) Preferred: No Dr Fiona Venus



**Patient Preference**


Preference expressed: 10/11/2014 Preference confirmed: 10/11/2014 Has made a living will Dr Carol S

Demographics, Contacts and Preferences tab



The following can be added, edited or deleted from this screen:

- **Registration Details** - Click  **Registration** to go to the selected patients registration screen.
- **Telephone numbers** - To add a phone number, click either:
  - **Add to Address**, to add contact details to the address (which updates other patients added as family members to this address) eg home phone number
  - **Add to Patient**, to add contact details to the individual patient eg mobile phone , email address
  - To edit phone numbers click on the number you want to update and click **Edit**.
  - To delete phone numbers, click on the number you want to remove and click **Delete**.
- **Carers/Contacts** - To view, add or edit carer or contact information, click  **Maintain** and complete as usual.
- **Access Information** -
- **Other Agencies Involved** -
- **Language(s) Spoken** -
- **Language(s) Read** -
- **Patient Preference** -

To add or edit access the above, either right click or click  and select either:

- **Add**, to add new access information
- **Edit**, to update existing access information
- Select **Close** to close the **Patient Preference** screen.