Niche Health
OASIS GROUP

noteSpace
Userguide

Documentation for Lloyd George and paper records management

Contents

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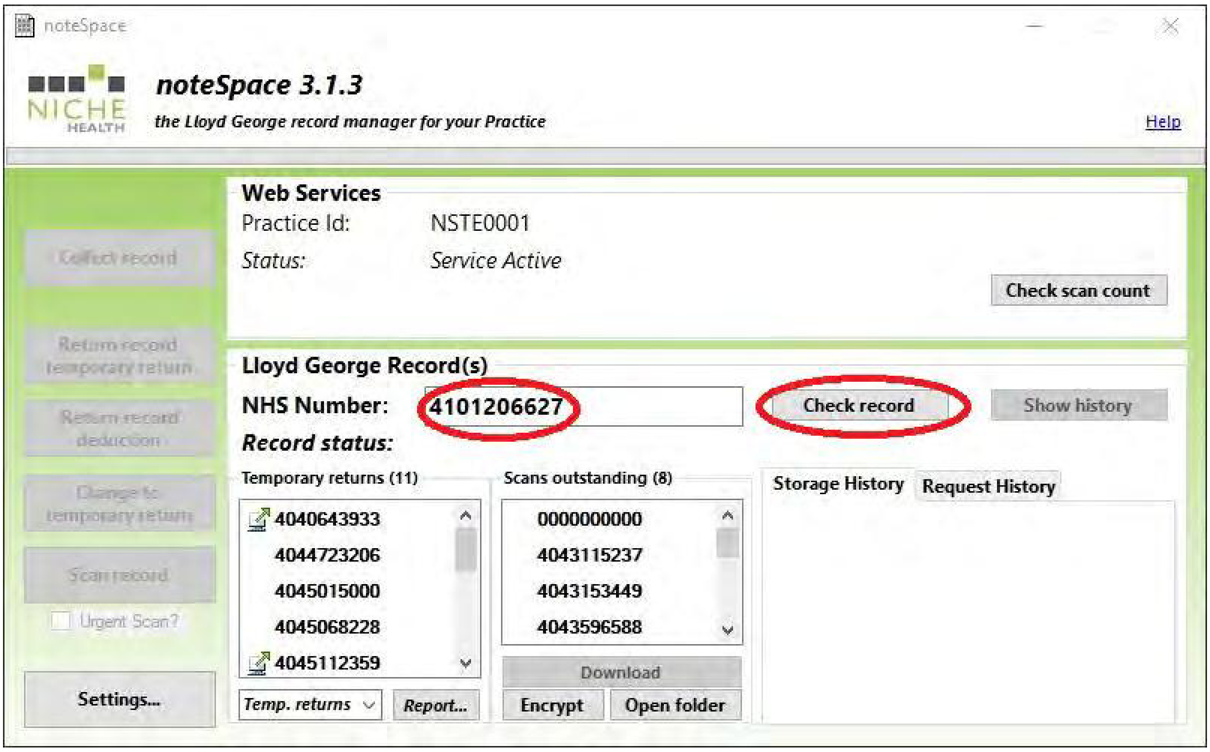
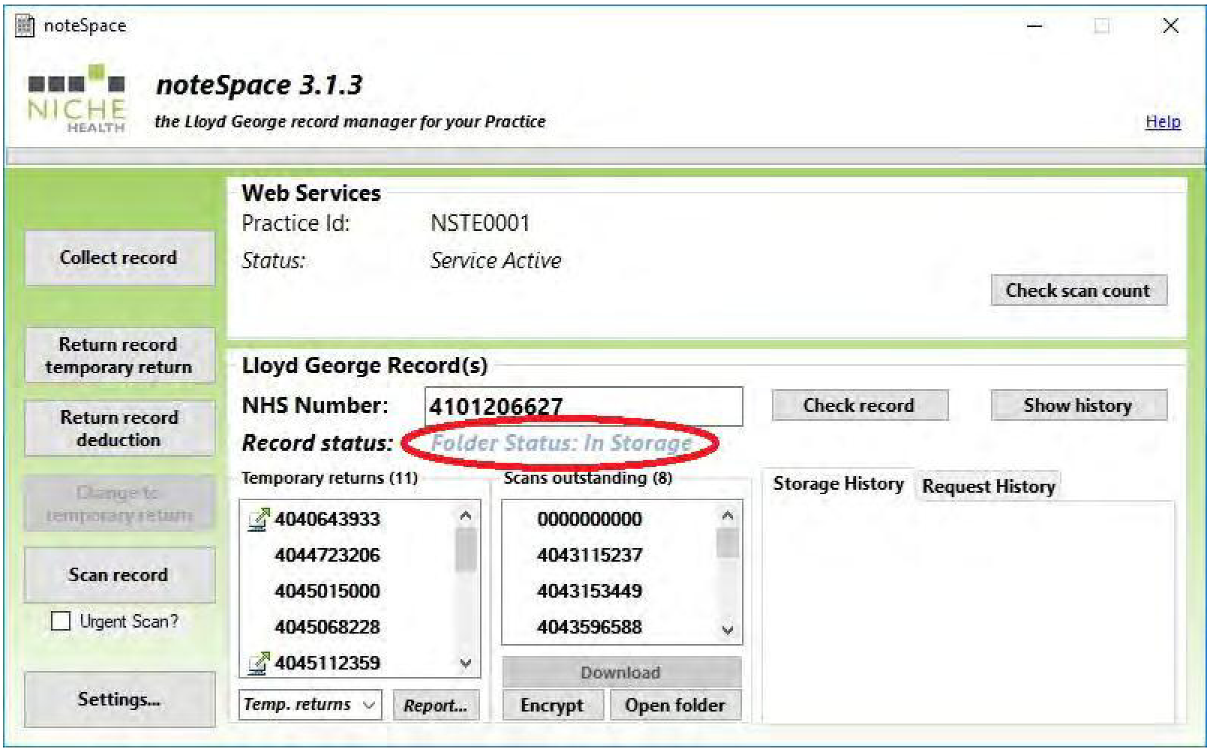
Requesting a Record as a Deduction

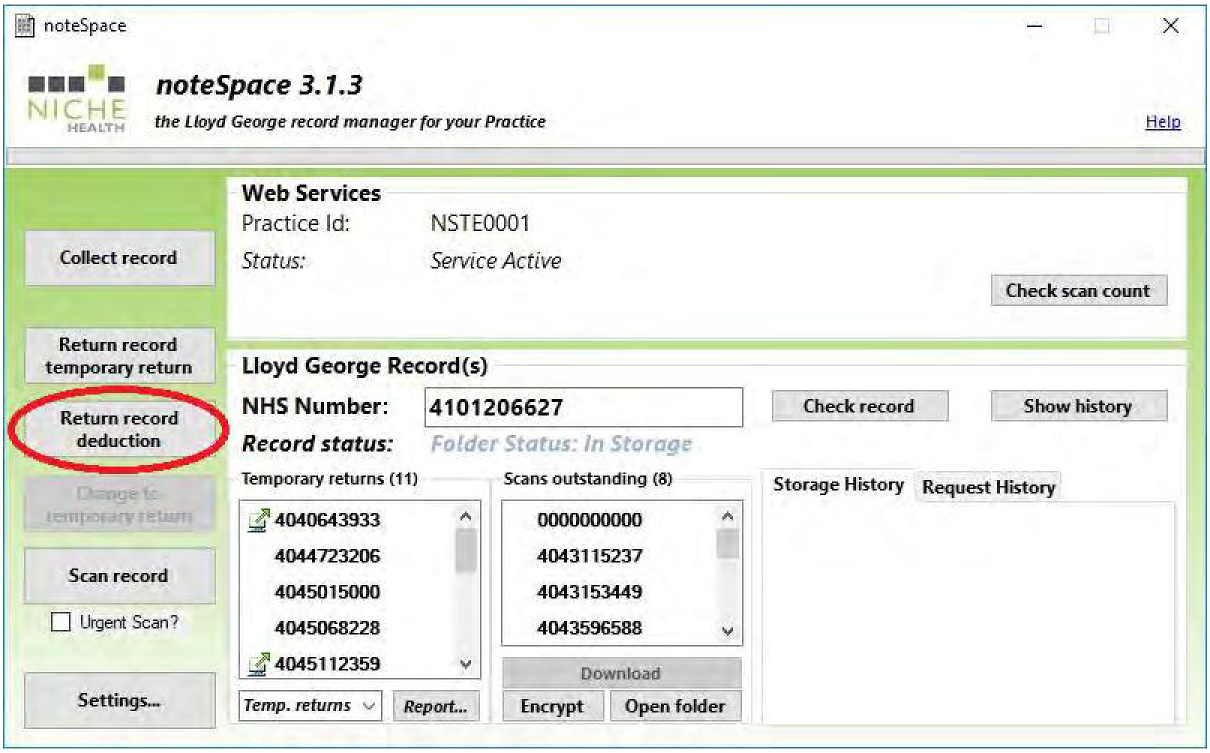
1. Enter the patients ten-digit NHS number and click on ‘Check record’.



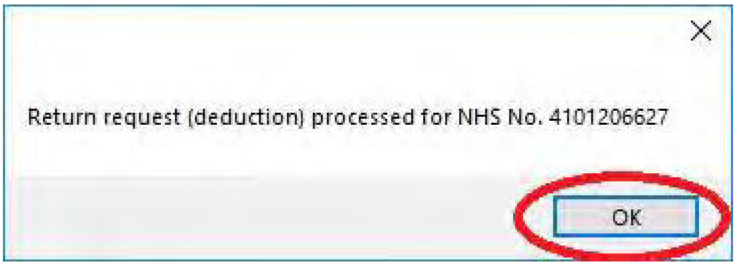
2. This will now check whether the record is in storage and update the record status accordingly.



3. If the record status is set to ‘In Storage’ click on ‘Return record (deduction)’.

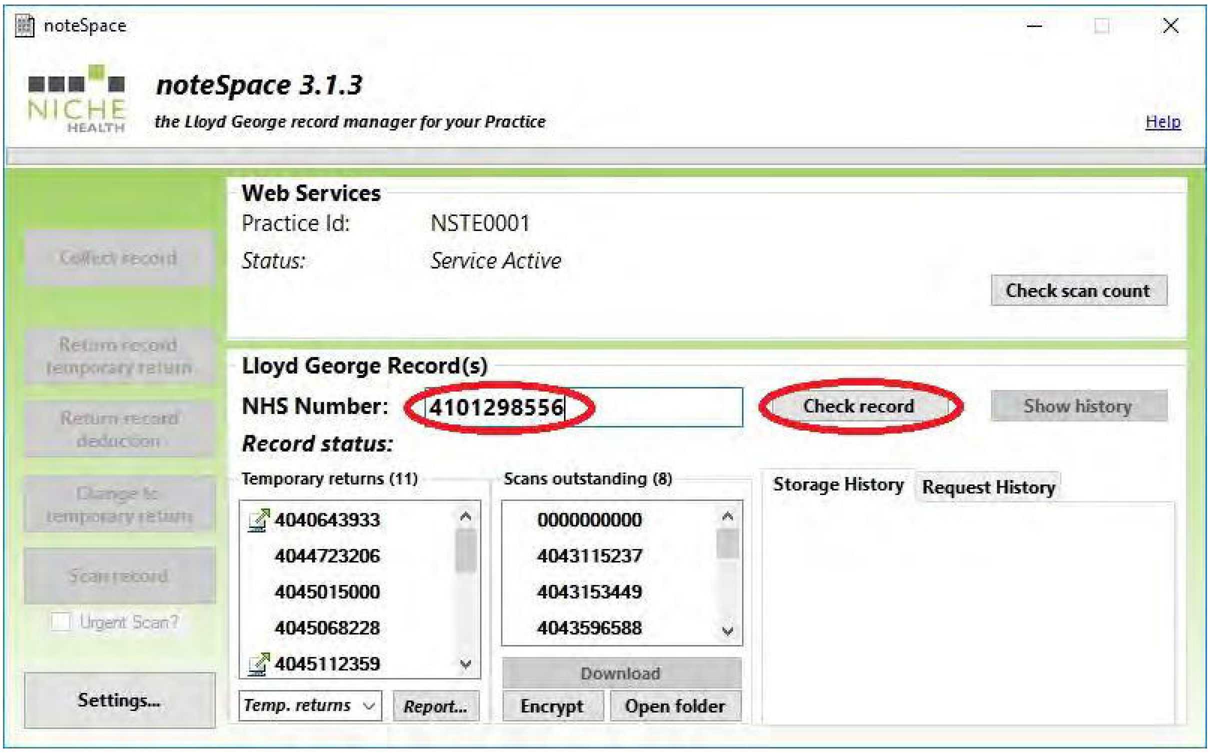


4. You will now be prompted with a confirmation that the deduction request has been processed, click on ‘Ok’.

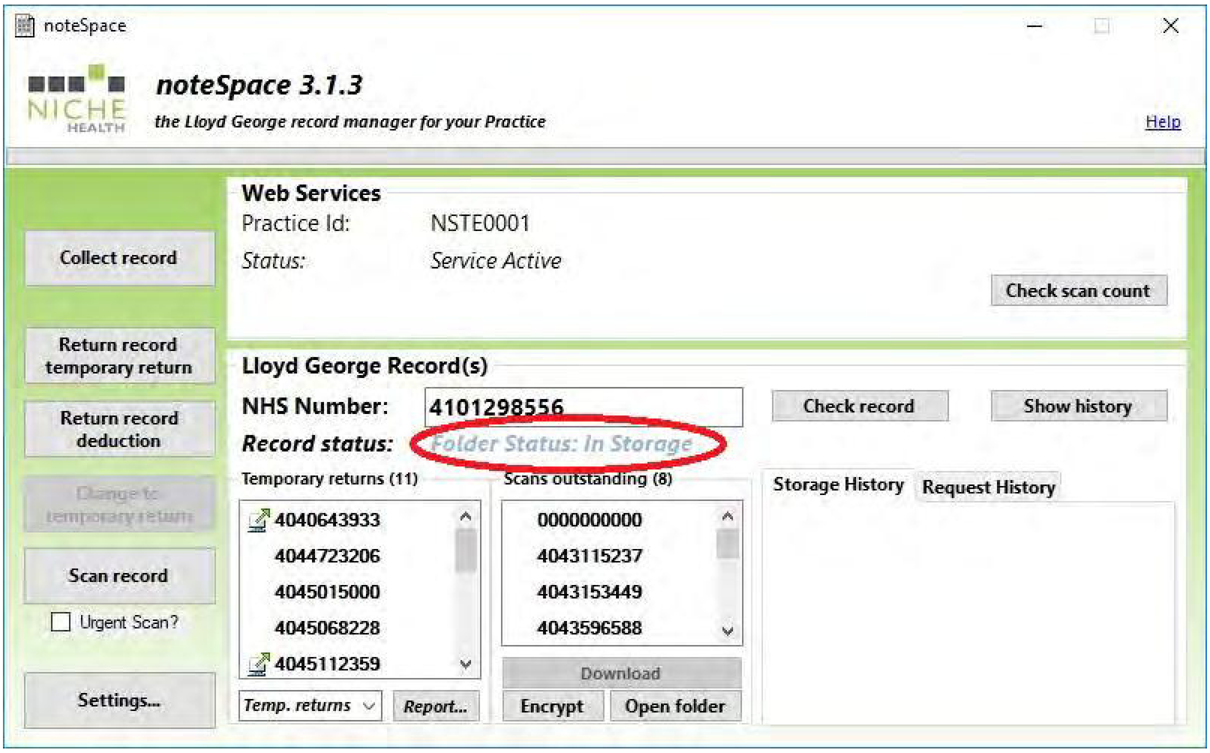


Requesting a Temporary Return

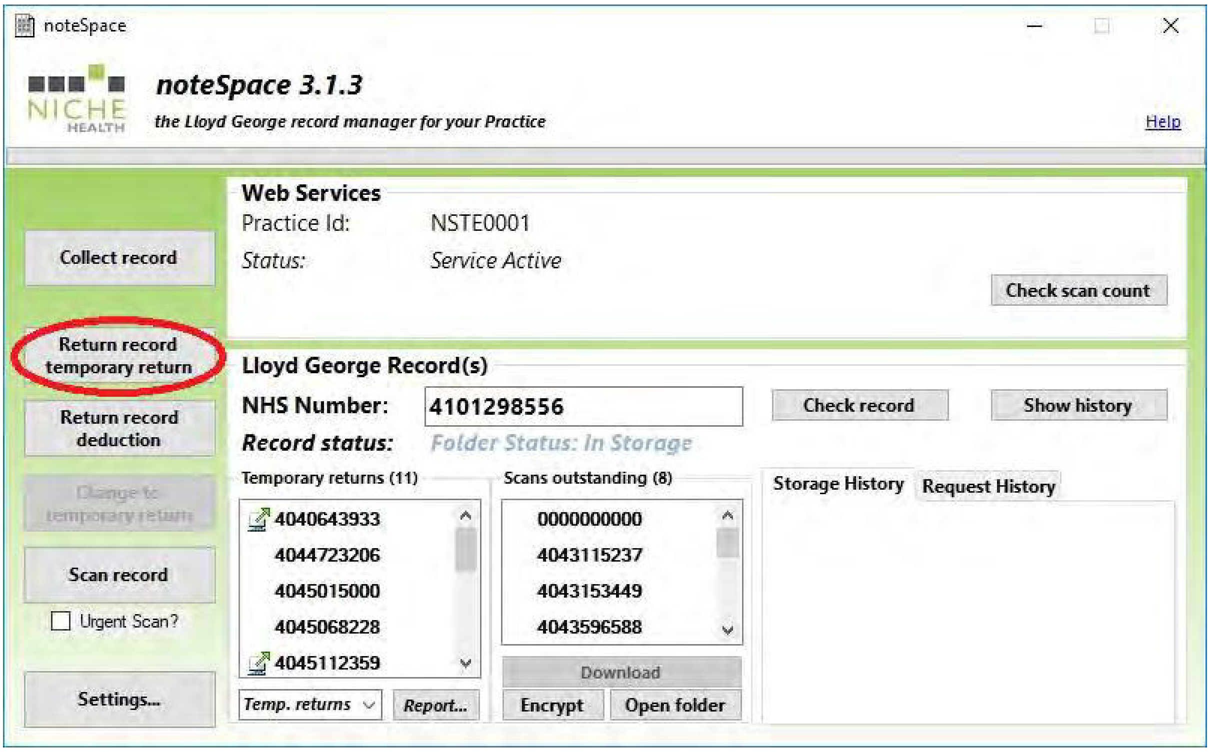
1. Enter the patients ten-digit NHS number and click on 'Check record'.



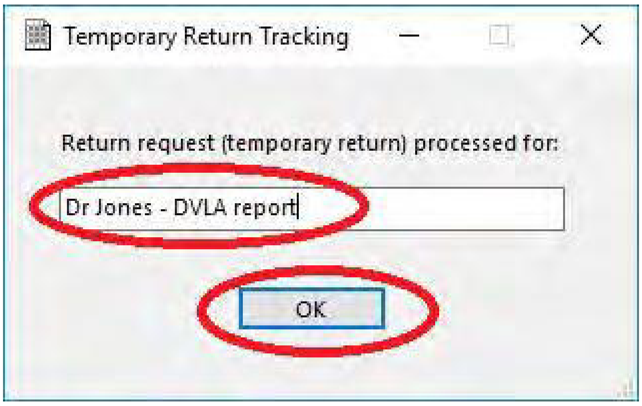
2. This will now check whether the record is in storage and update the record status accordingly.



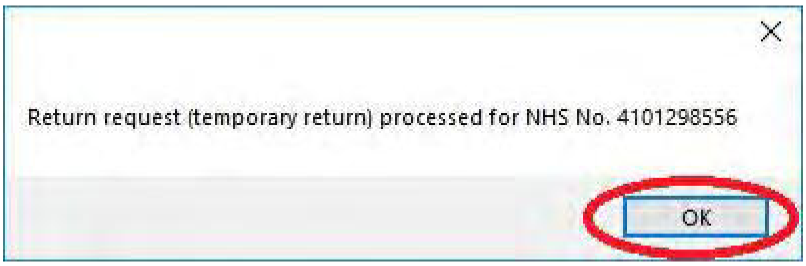
3. If the record status is set to ‘In Storage’ click on ‘Return record (temporary)’



4. You will now be prompted to enter some information about the request. The information entered can be used at a later date if you need to track who requested the record. Once you have entered the relevant information click on ‘Ok’

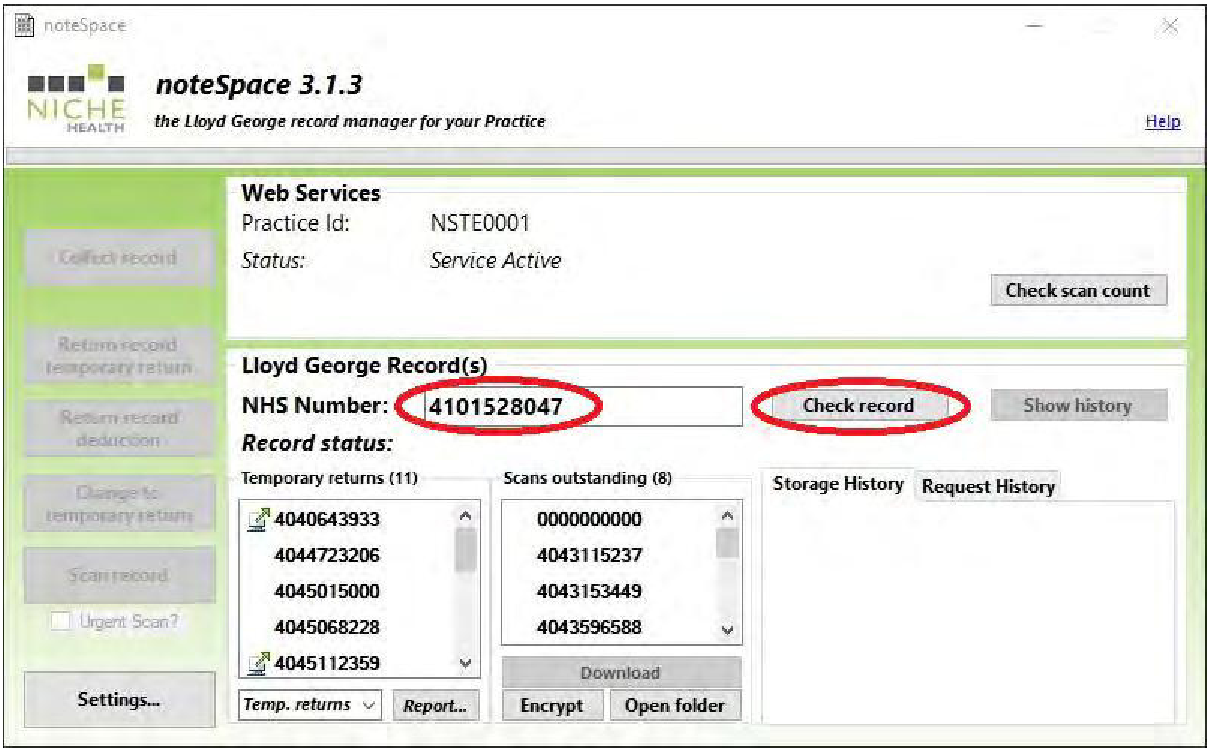


5. You will now be prompted with a confirmation that the temporary return request has been processed, click on ‘Ok’.

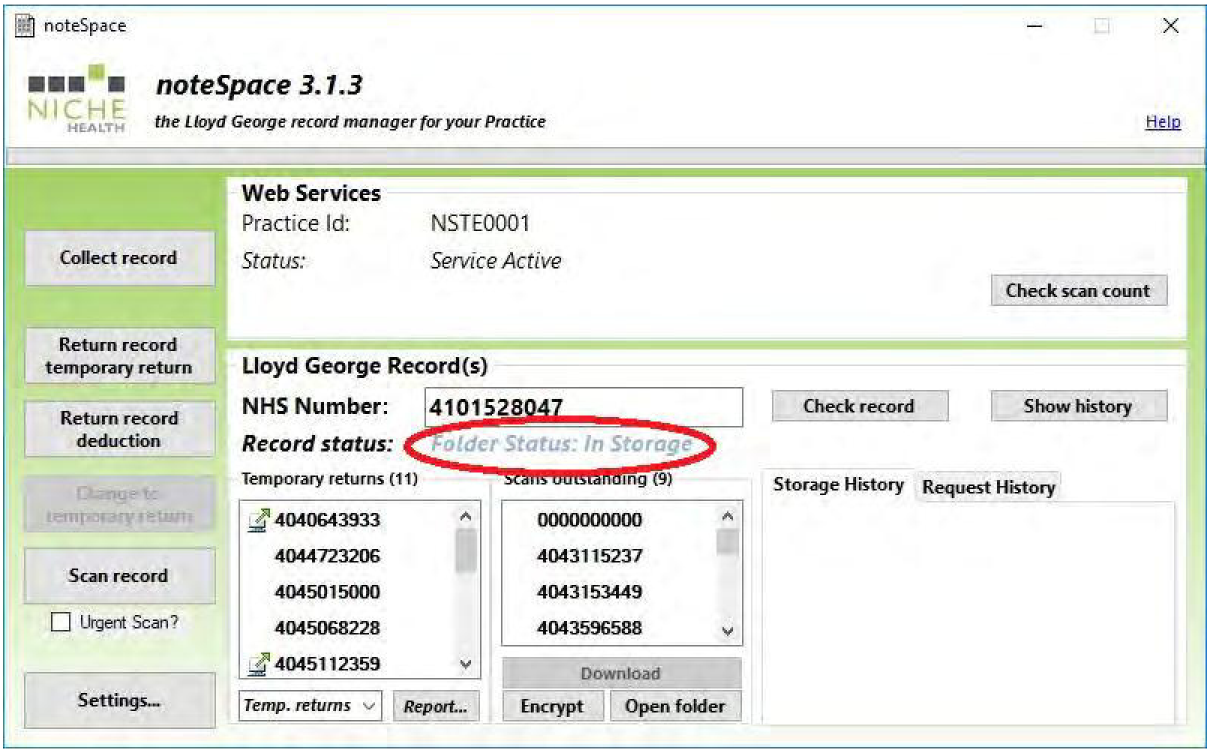


Requesting a Scanned Record

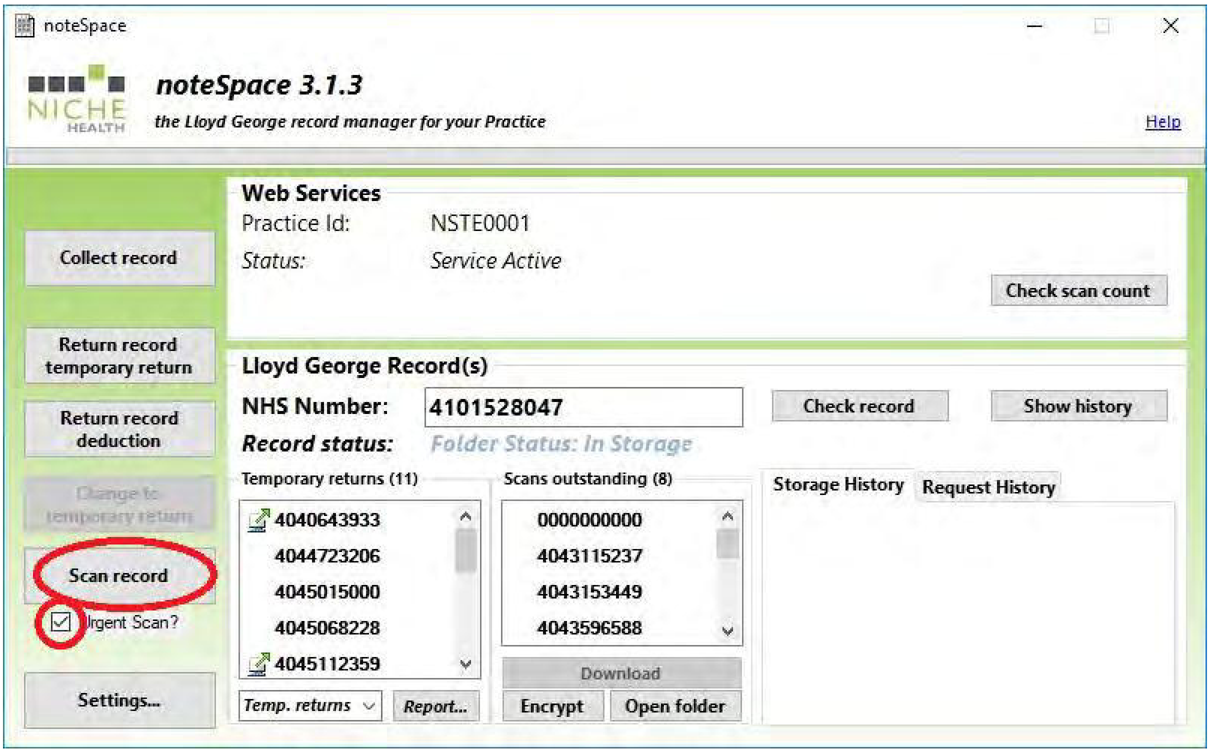
1. Enter the patients ten-digit NHS number and click on ‘Check Record’.



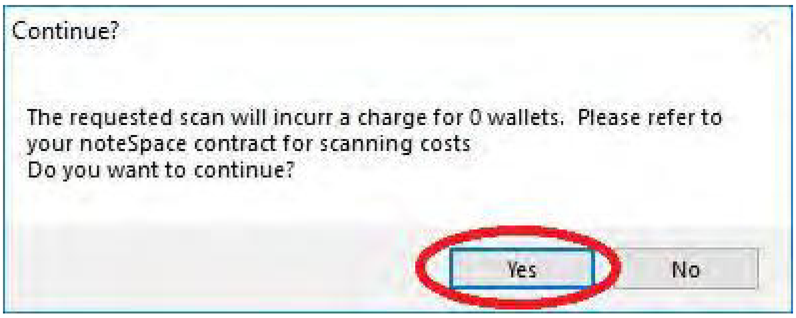
2. This will now check whether the record is in storage and update the record status accordingly.



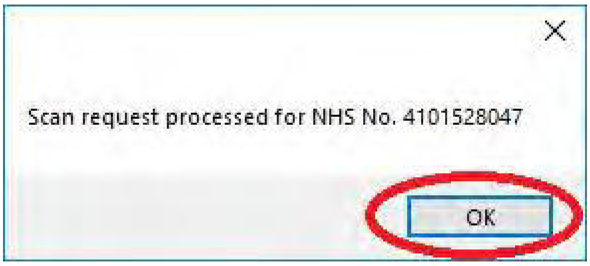
3. If the record status is set to ‘In Storage’ you can request the file to be scanned. You can request the scan to be urgent by ticking the ‘Urgent Scan’ box this will inform the storage facility that you need the scan delivered within four working hours otherwise the scan will be delivered within twenty-four working hours. To request the scan, click on ‘Scan Record’.



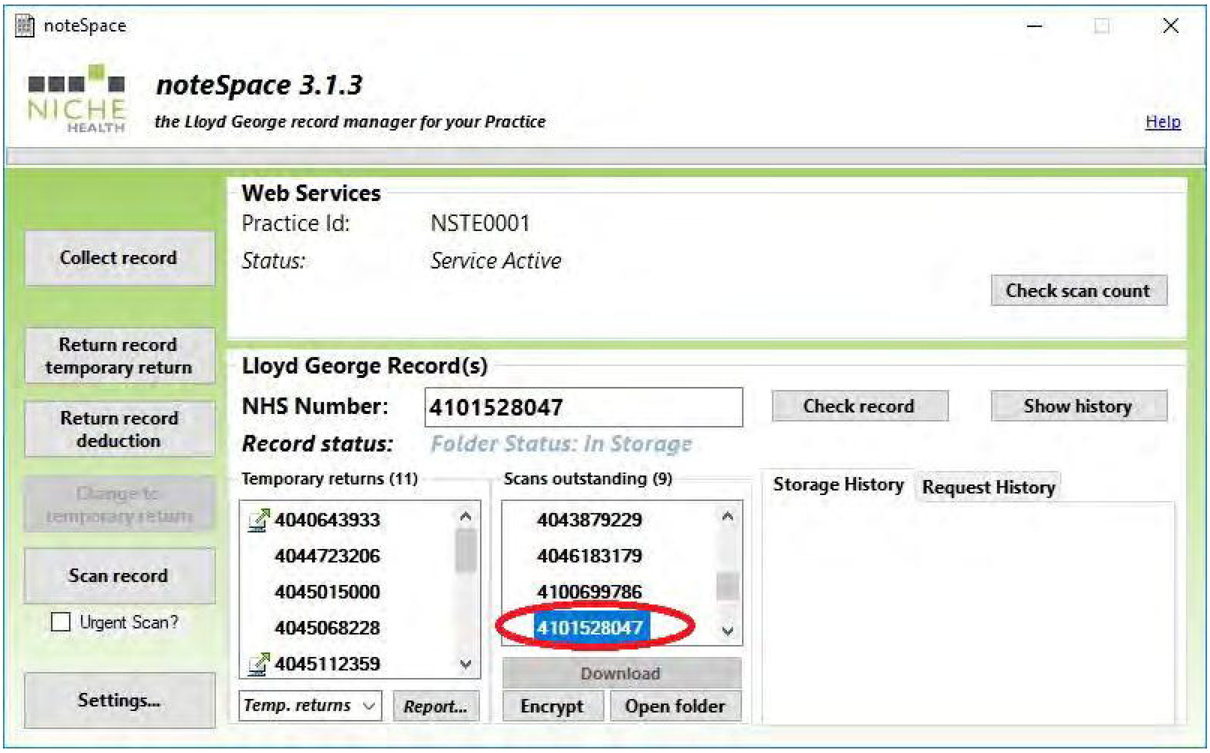
4. You will now see a message box informing you how many wallets there are for that NHS No. You can either click ‘Yes’ to proceed with the Scan request or ‘No’ to cancel the request.



5. If you clicked Yes you will now be prompted with a confirmation that the scan request has been processed click on ‘Ok’.

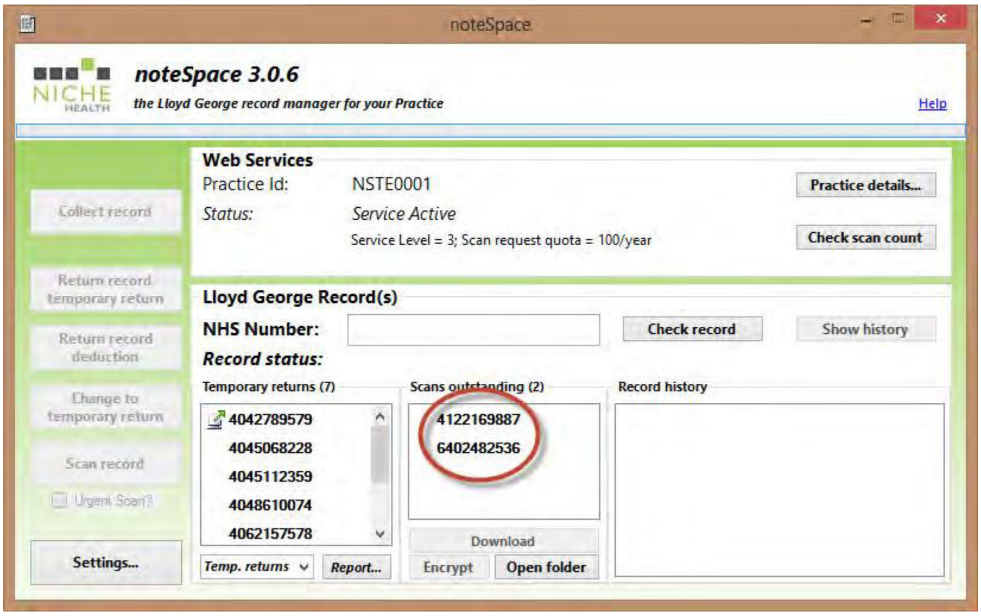


6. You will now see in the 'Scans outstanding' window that the record has been requested as a scan.

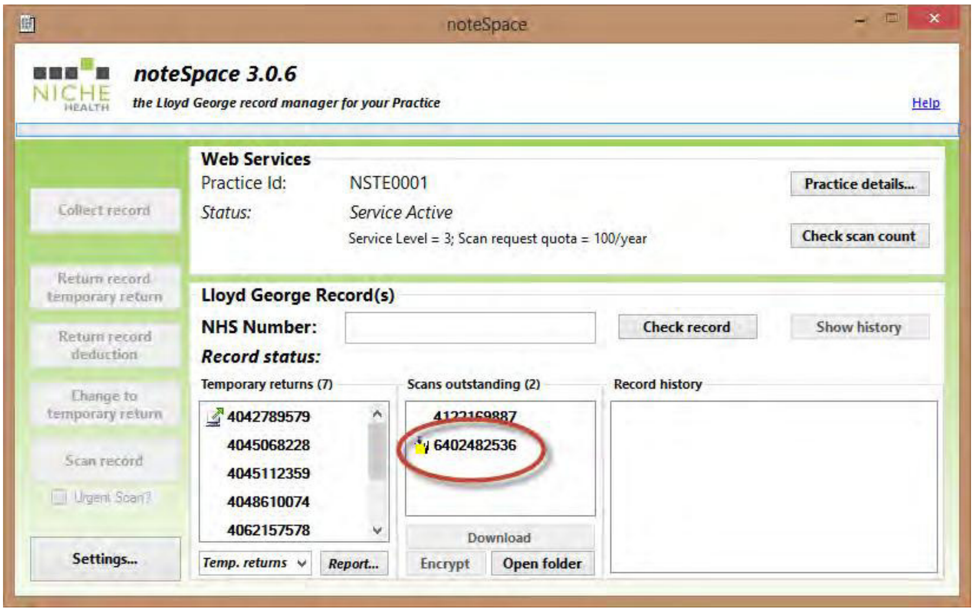


Downloading Scan Requests

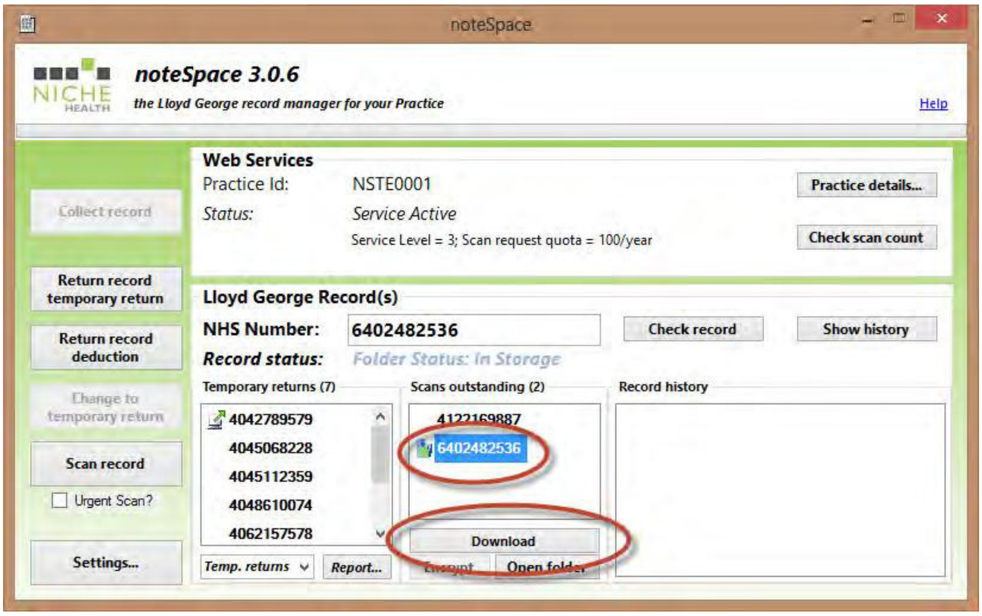
1. Under the ‘Scans outstanding’ window you will see how many scans are currently outstanding



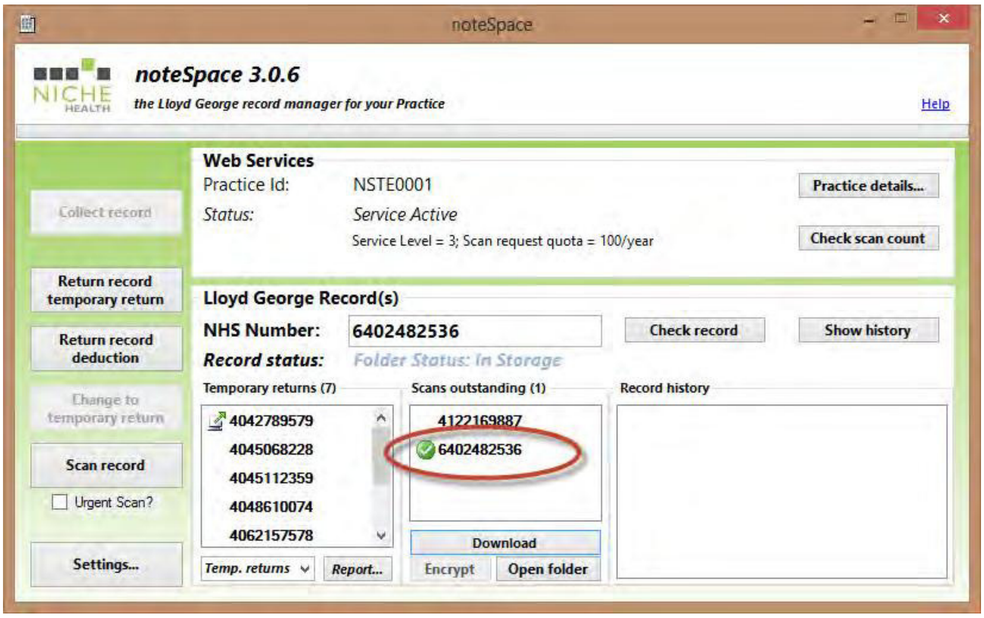
2. When a patient’s record has been scanned and is waiting to be downloaded from the secure server, noteSpace will identify this by putting a yellow folder next to the relevant NHS number



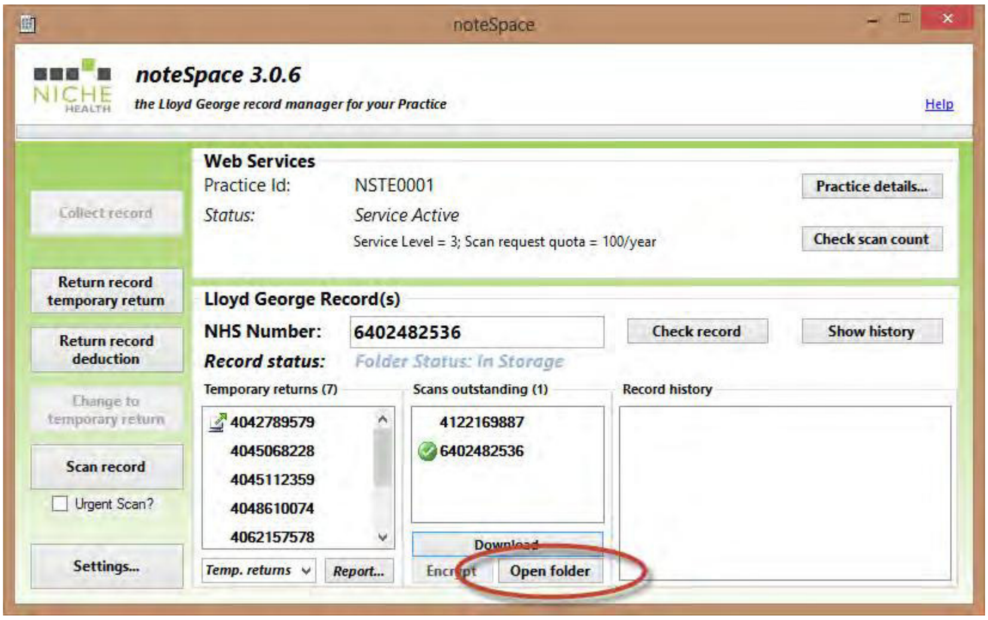
3. Click on the file you wish to download and click on ‘Download’



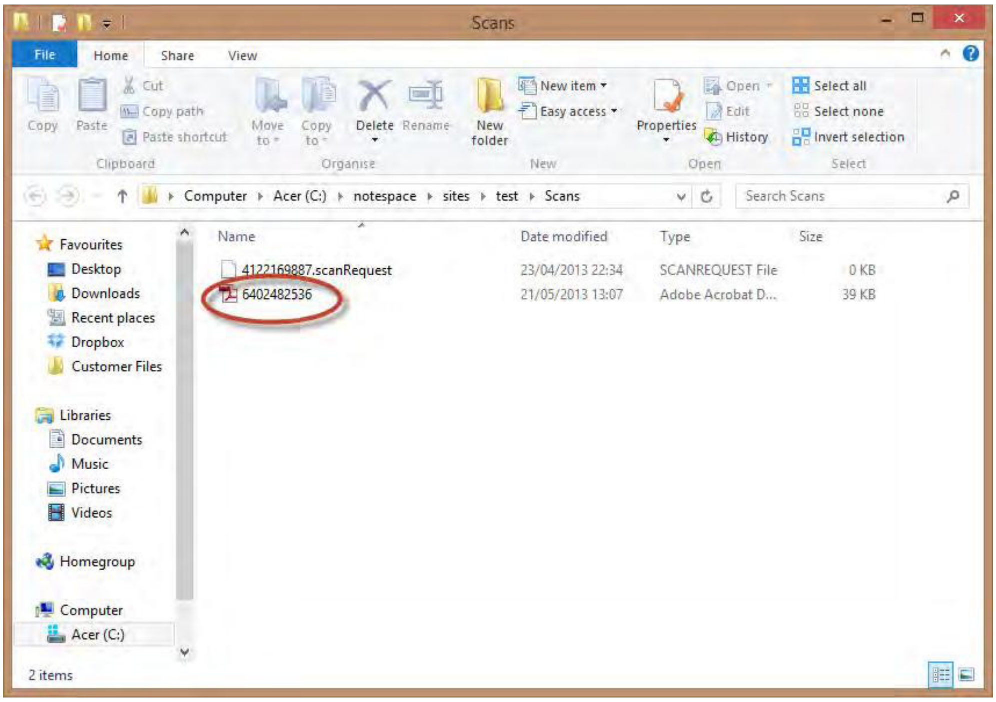
4. This will now download the file and the NHS number will have a green tick next to it to identify this file is downloaded



5. To access the downloaded file, click on 'Open Folder'

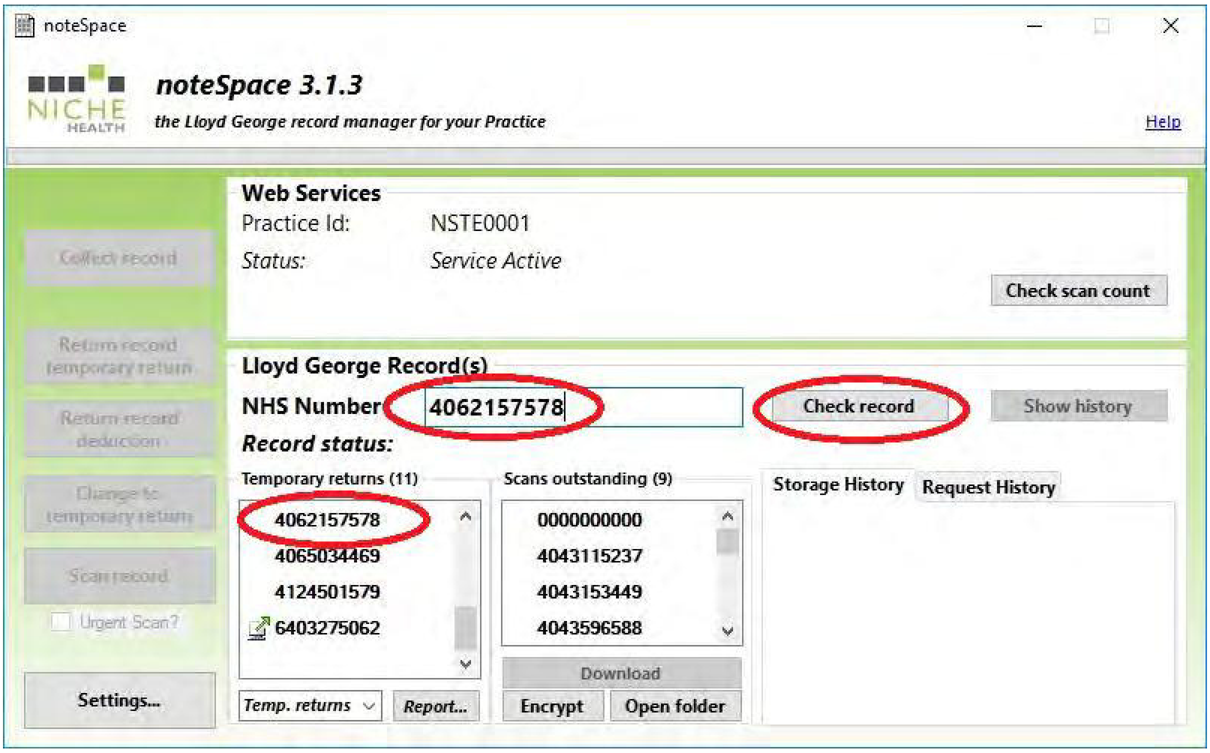


6. From here you have access to the downloaded PDF files allowing you to print them or attach them to your clinical system / document management system

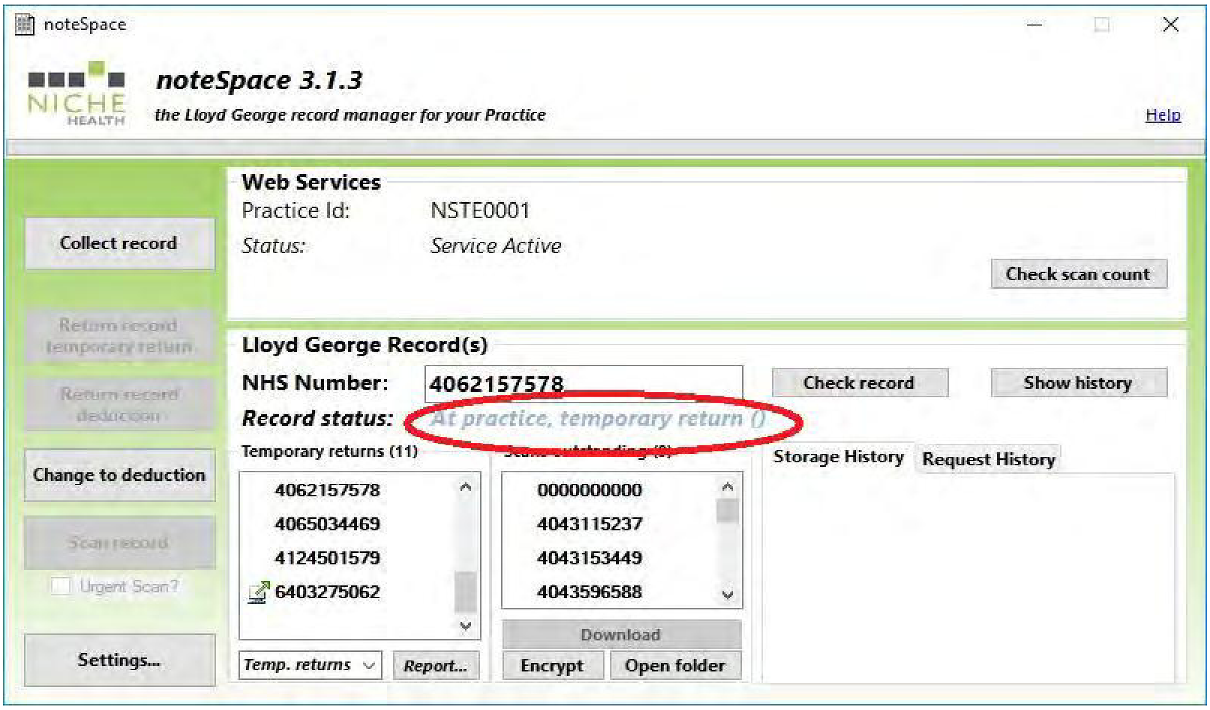


Returning a Record to Storage

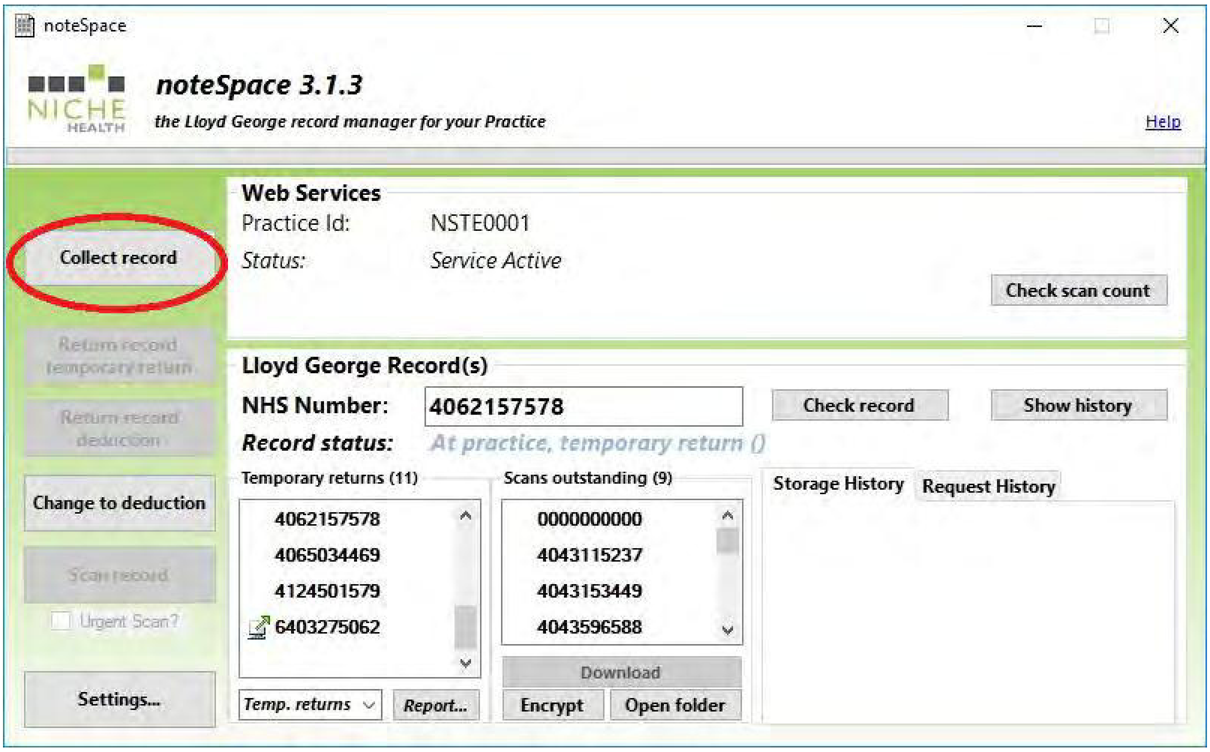
1. Enter the patients ten-digit NHS number and click on ‘Check record’ alternatively you can click on the NHS number under the ‘Temporary Returns’ window.



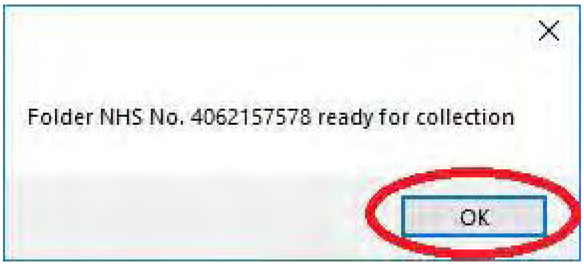
2. This will now check whether the record is currently at the Practice as a temporary return.



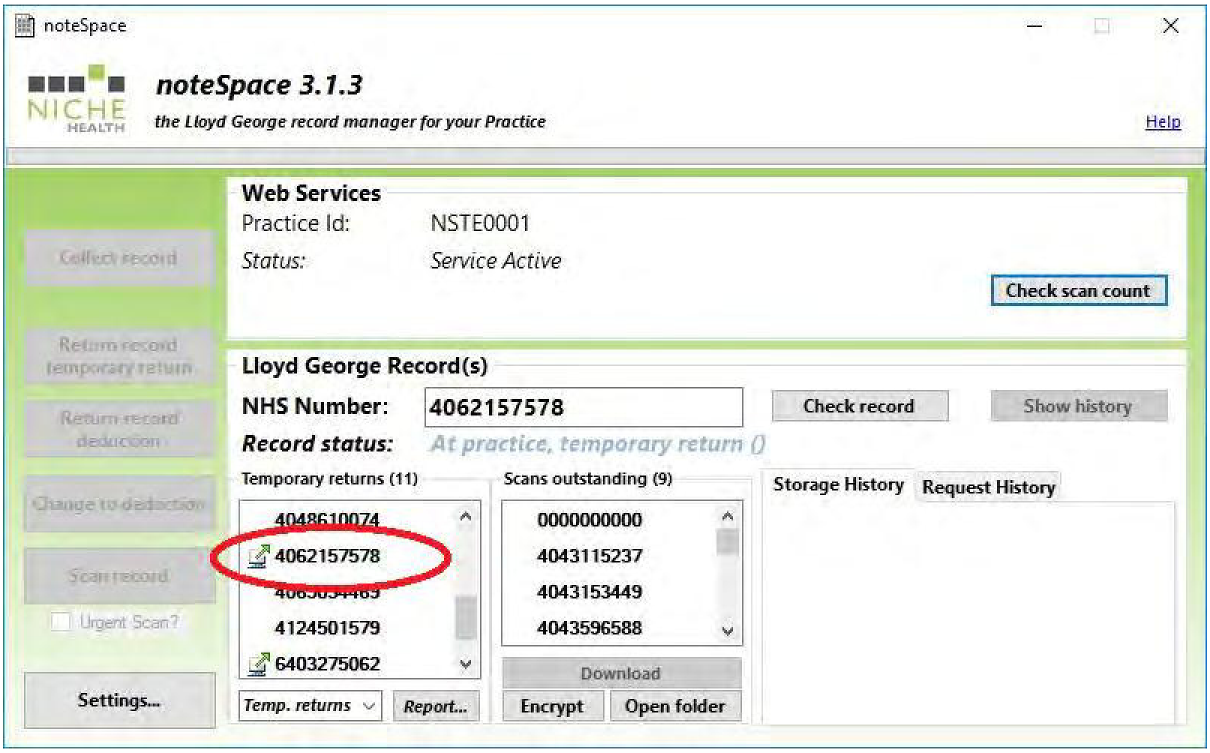
3. If the record status is set to ‘At practice, temporary return’ click on ‘Collect record’. If the file status is set to ‘At practice, deduction’ you will need to change the status from deduction to temporary return before proceeding.



4. You will now be prompted with a confirmation that the collection request has been processed, click on ‘Ok’.

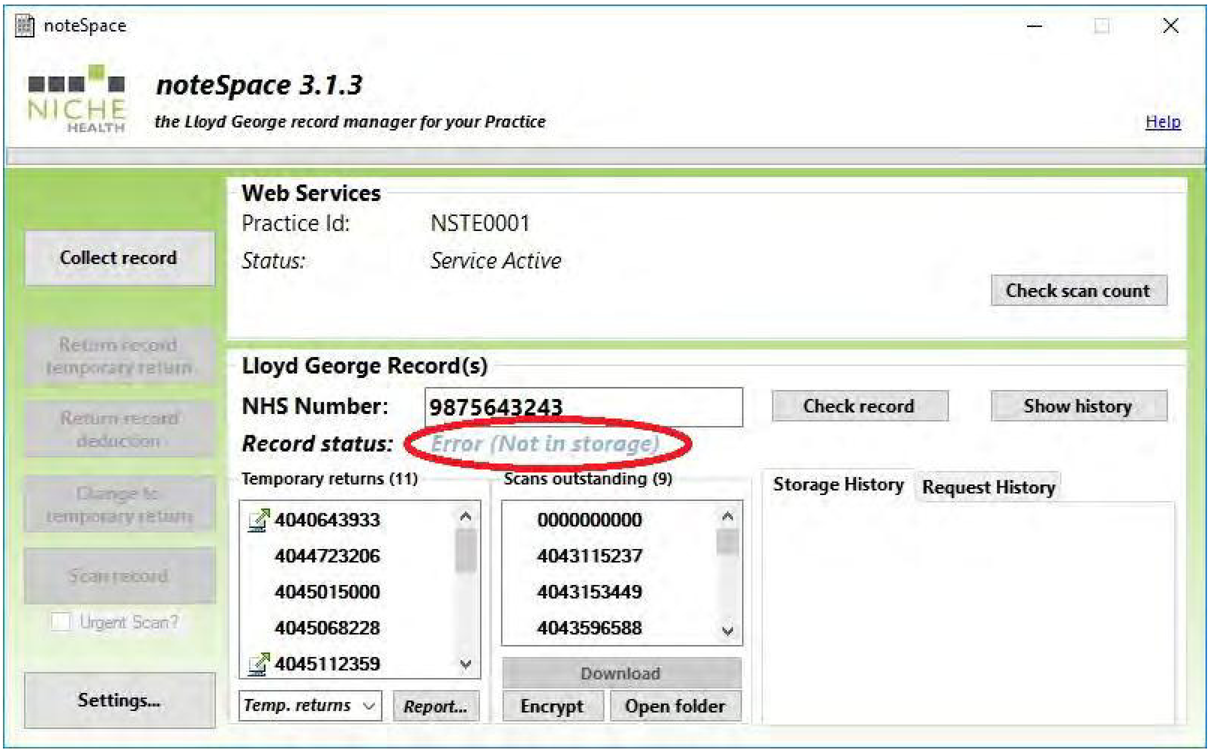


5. The NHS number that you have requested for collection now has an arrow symbol next to it that identifies that this record has been marked for collection.

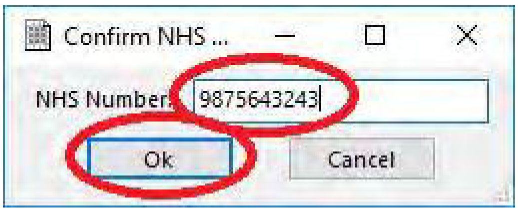


Adding new Records into Storage

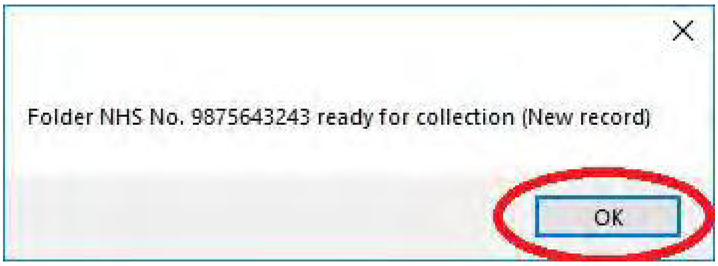
1. Enter the new patient's ten-digit NHS number in the NHS Number field and click on 'Check Record', Record status will show 'Error (Not in storage)'.



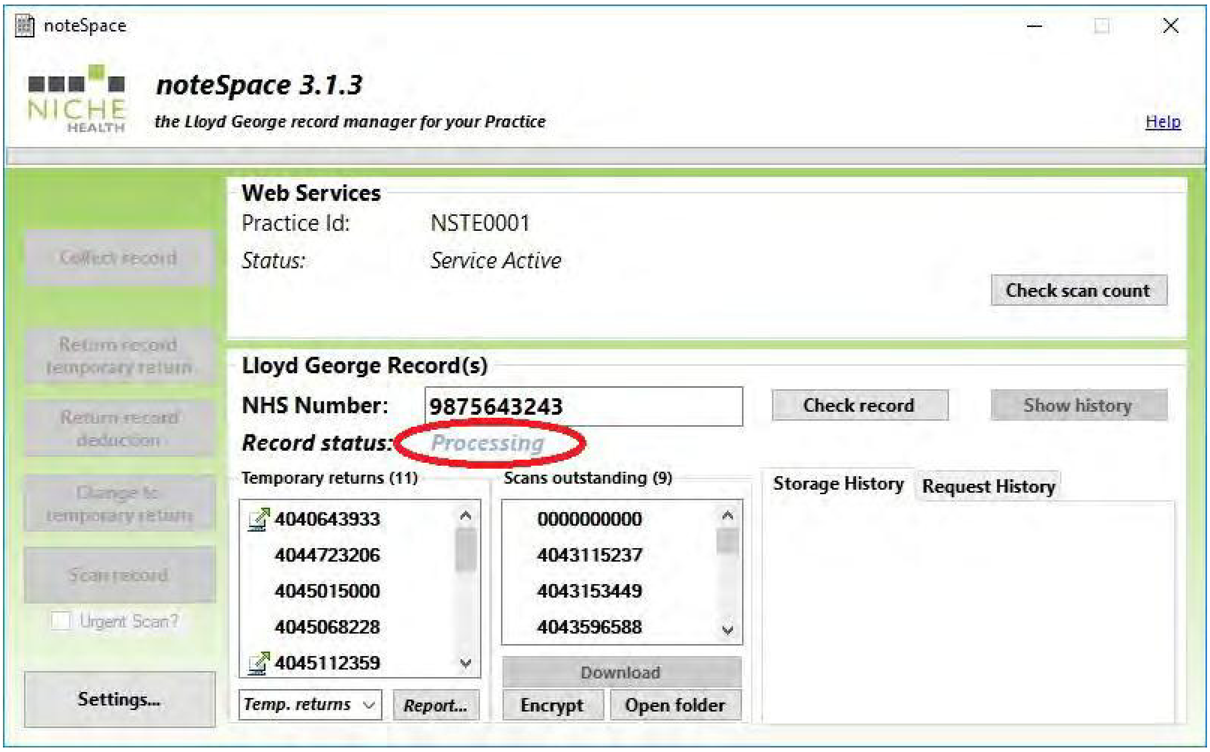
2. Click on 'Collect Record' and Confirm NHS Number box will appear. Re-enter the NHS number and click on 'Ok'.



3. Once you have clicked on 'OK' the following window will open. Press 'Ok'.



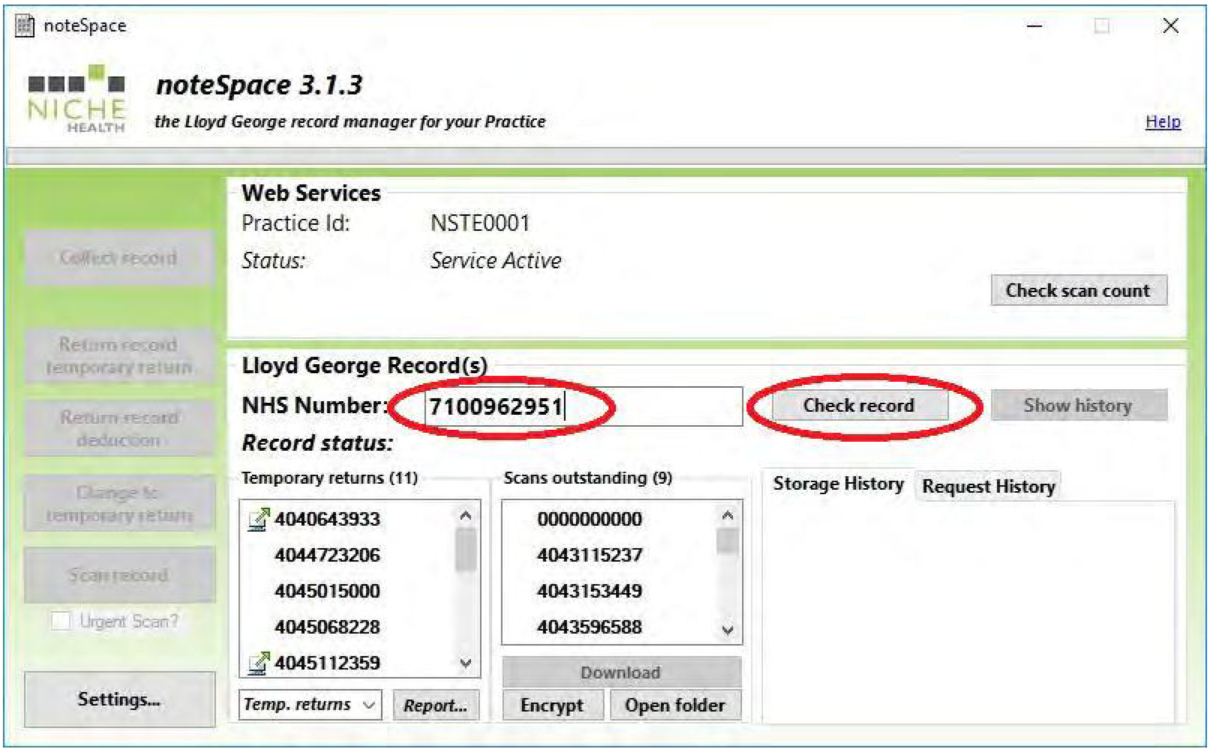
4. Please note that once the new number has been entered and confirmed, the 'Record status' will show 'Processing', this status will remain until the notes have been collected and processed at Box-it - Oasis Group.



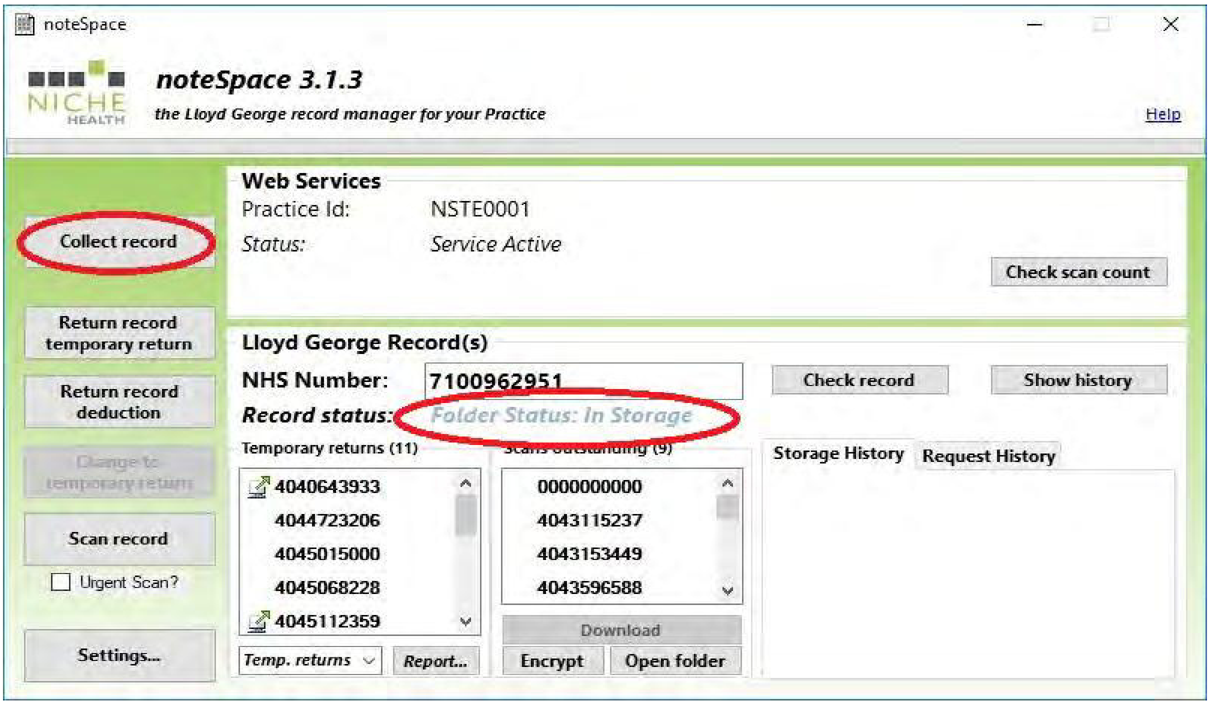
Please remember to keep new notes with no barcodes on in a separate box to those with barcodes on

Adding a New Part of an Existing Record into Storage

1. Enter the ten-digit NHS number and press 'Check record' Record Status will show 'Record status: In Storage".



2. Press 'Collect record' button.



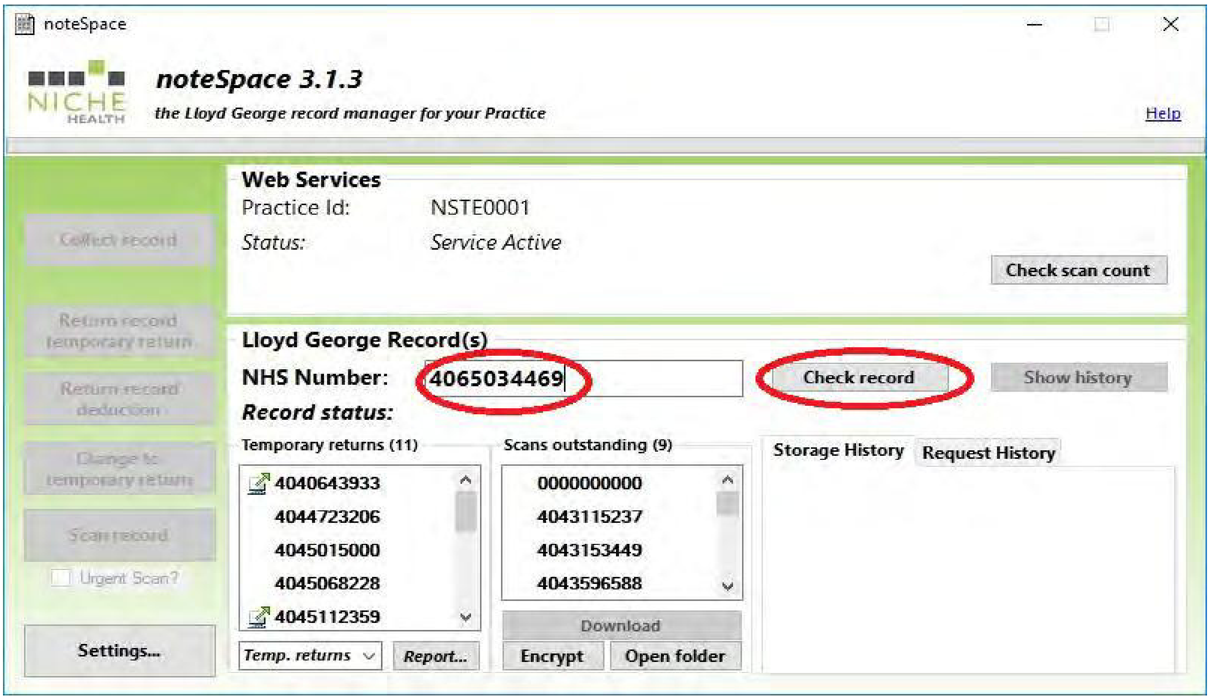
3. The following window will open, Press on ‘OK’.

The notes will now be put together when in storage.

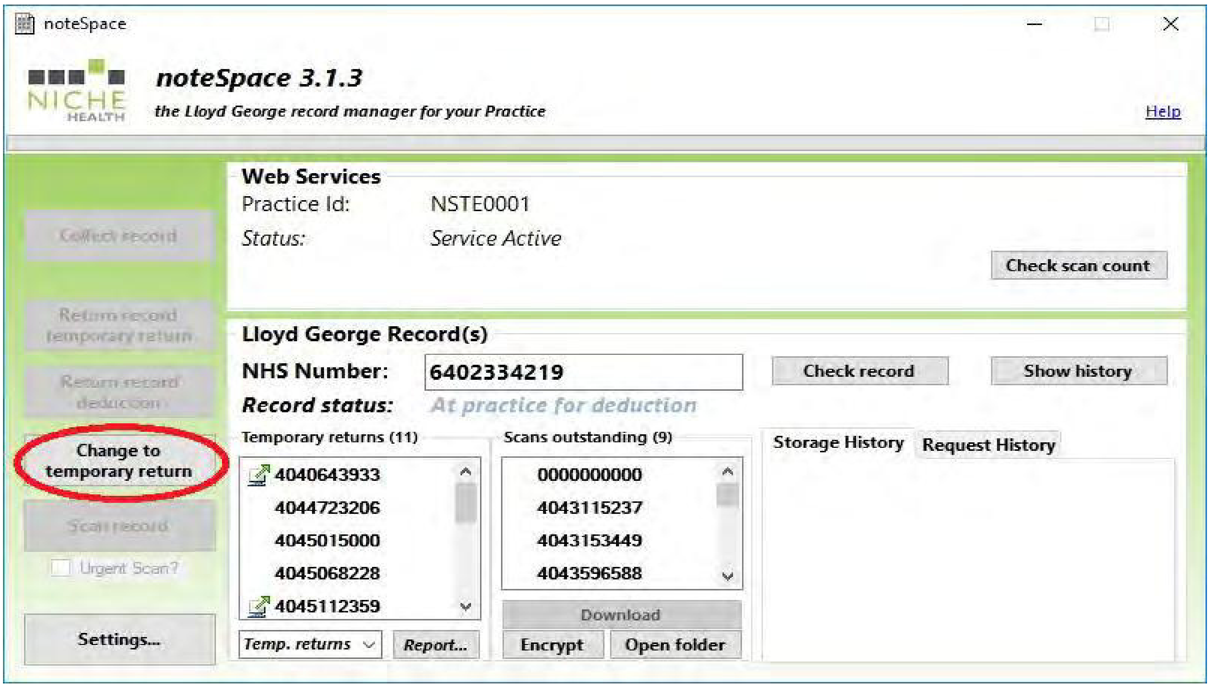
Please remember to keep new notes with no barcodes on in a separate box to those with barcodes on

Changing the Status from a Deduction to Temporary Return

1. Enter the patients ten-digit NHS number and click on ‘Check record’.



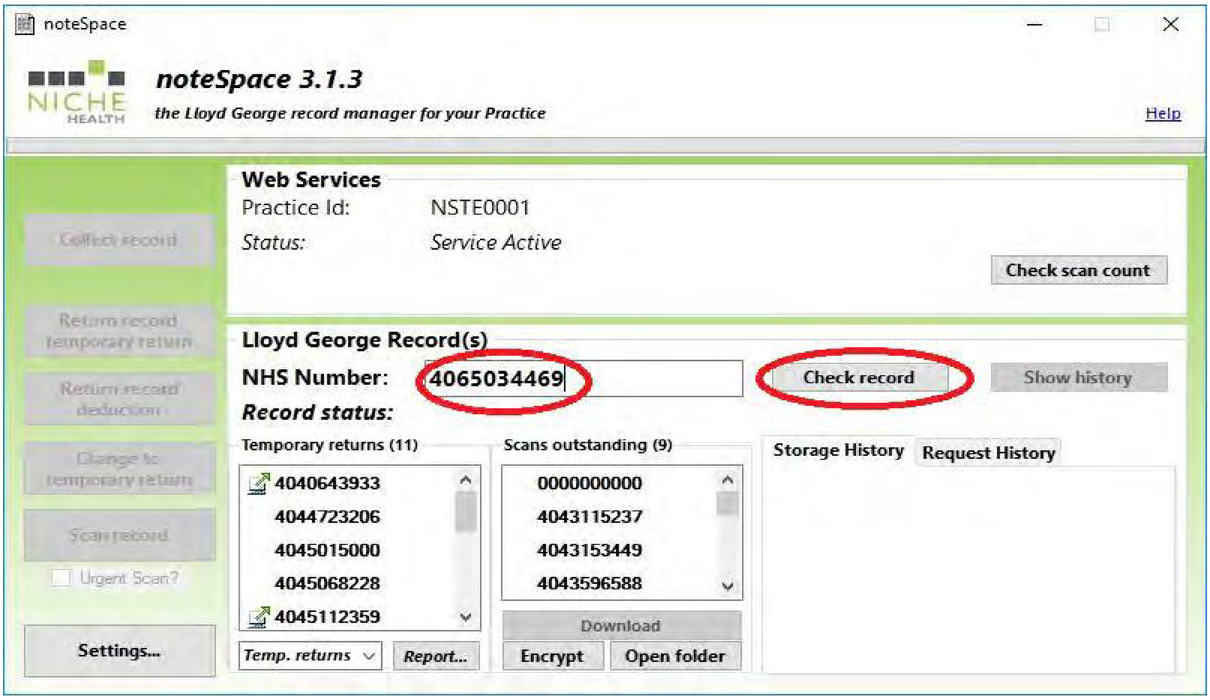
2. If the status is set to ‘At practice for deduction’ click on ‘Change to temporary return’.



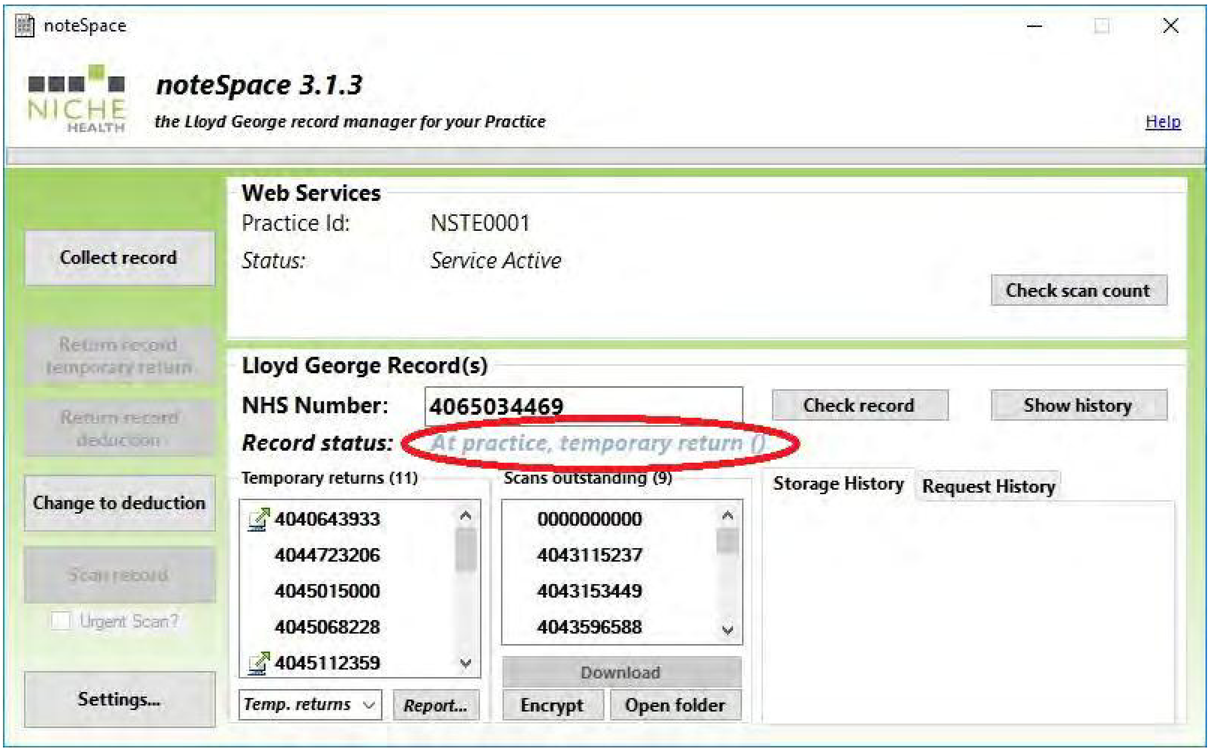
3. This will now send a request to the storage facility informing them to change the status of this record to a temporary return.

Changing the Status from a Temporary Return to Deduction

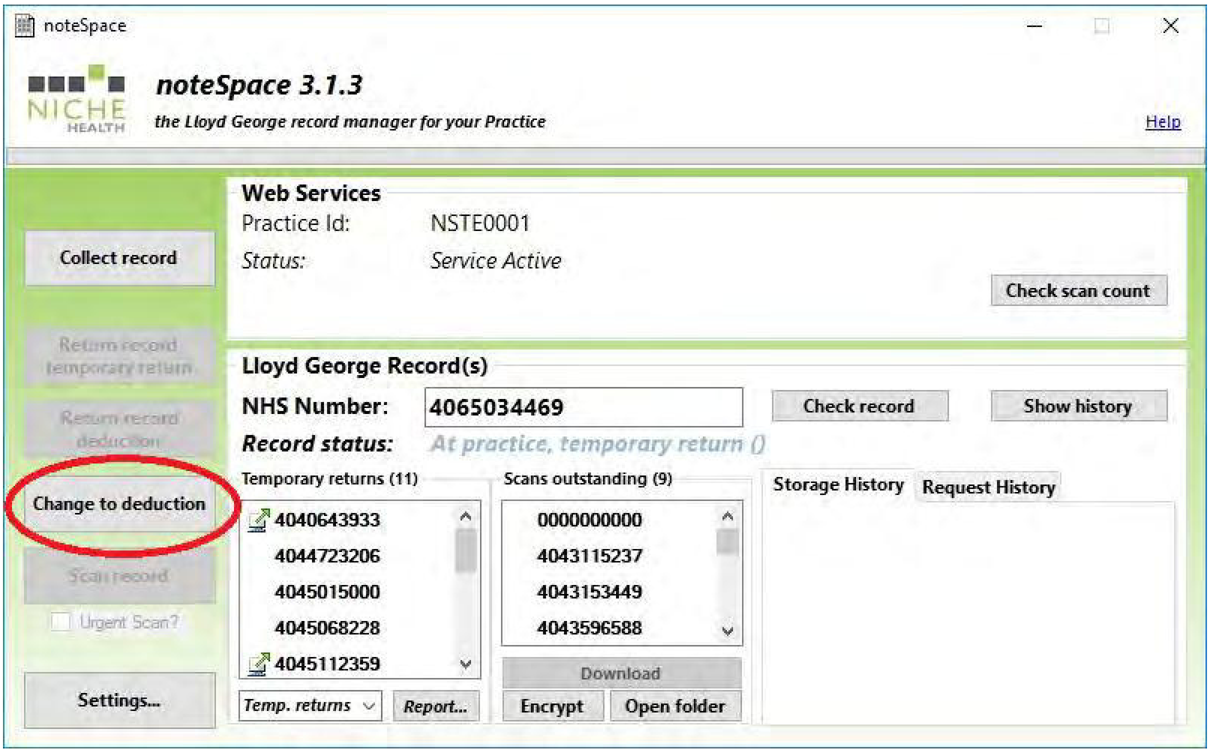
1. Enter the patients ten-digit NHS number and click on ‘Check record’.



2. This will now display the current status of the record.



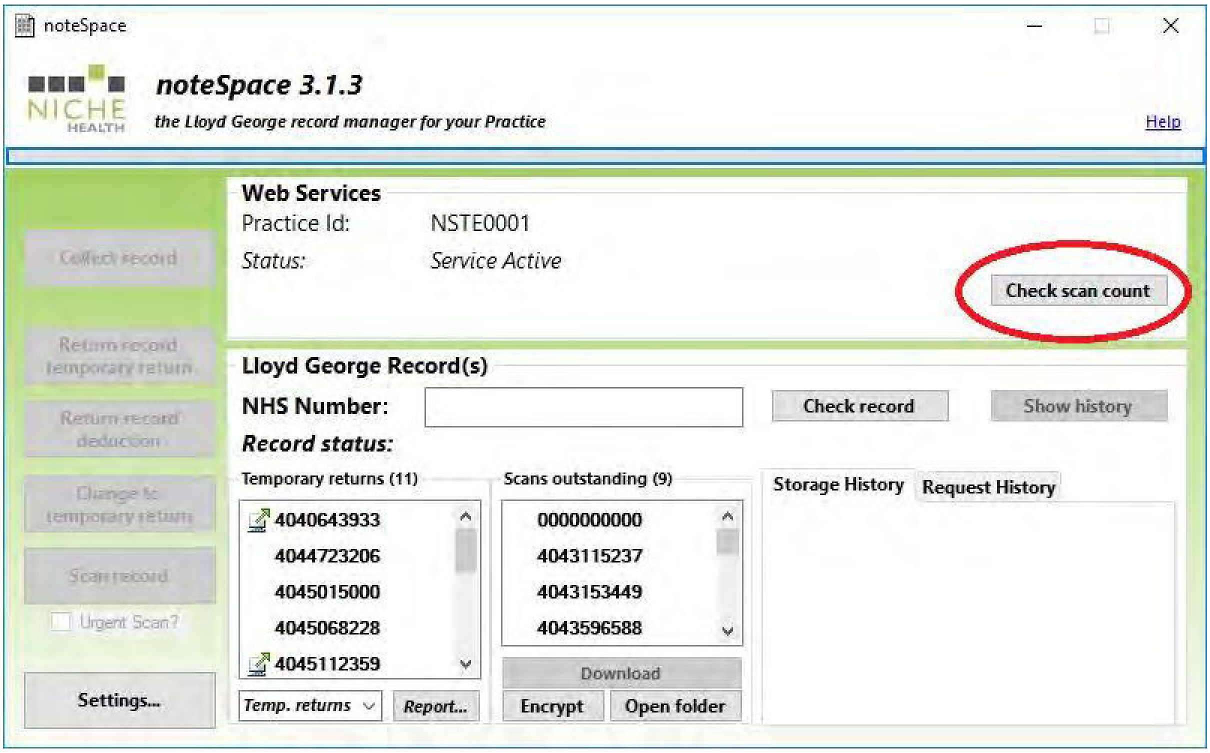
3. If the record status is set to 'At practice, temporary return' click on 'Change to deduction'.



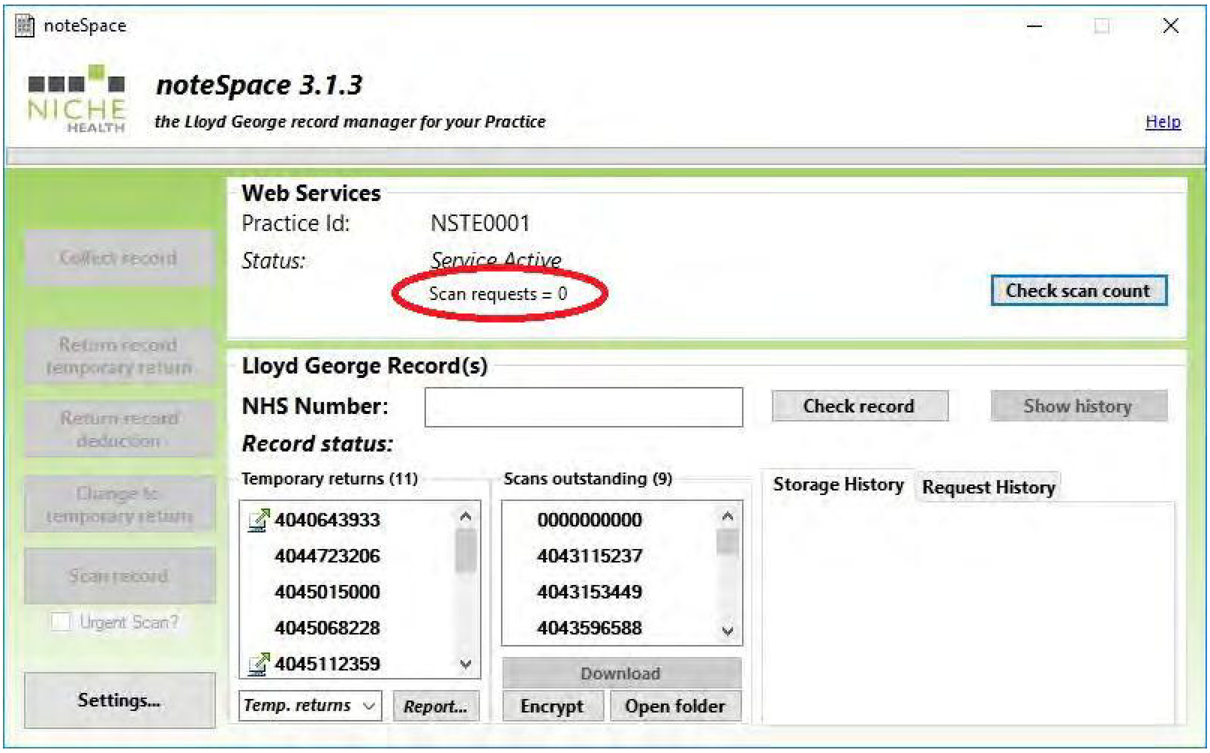
4. This will now send a request to the storage facility informing them to change the status of this record to a deduction.

Checking how Many Scans you have Ordered

1. On loading noteSpace click on the 'Check scan count'.

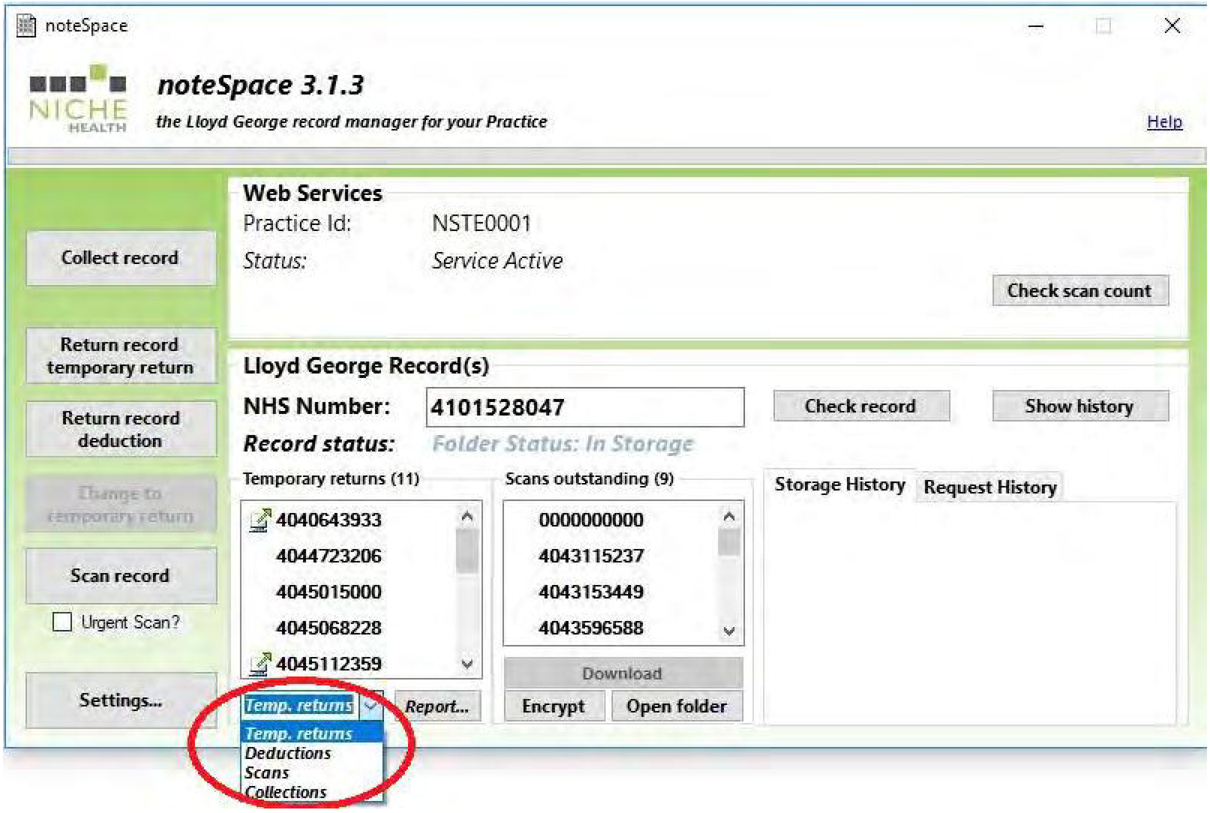


2. The number of scan requests ordered will be displayed under the service status. This number does not include current scans outstanding.

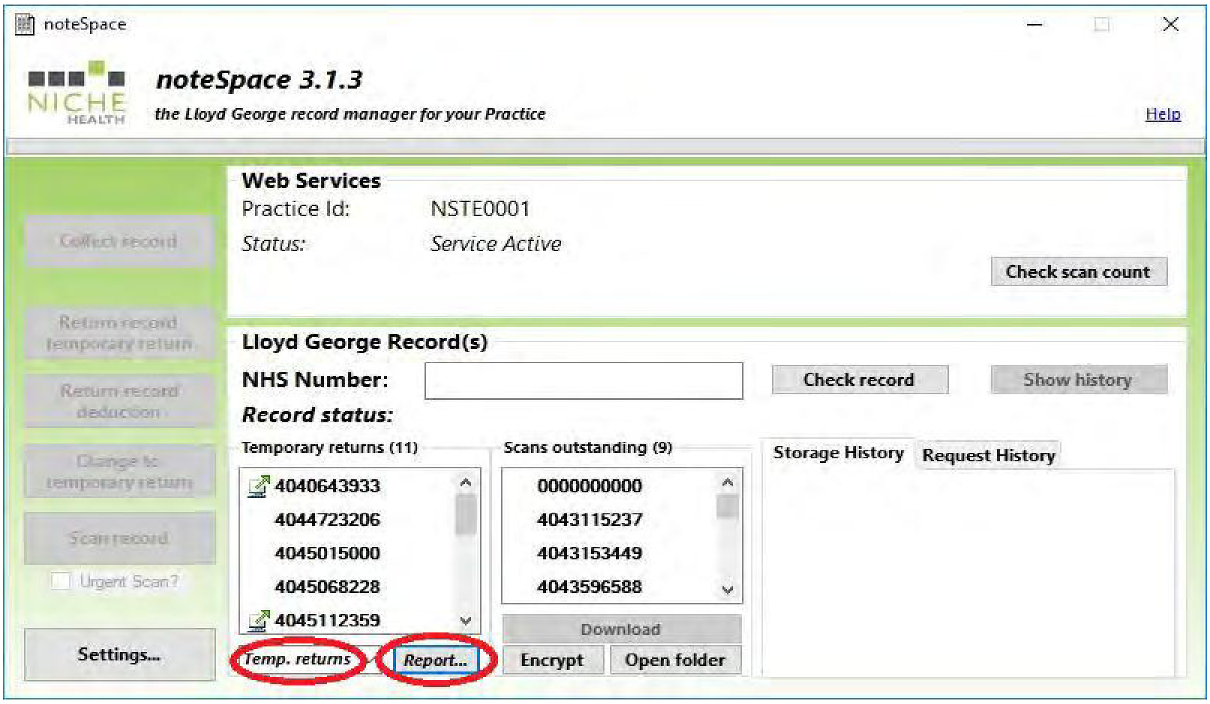


Reporting

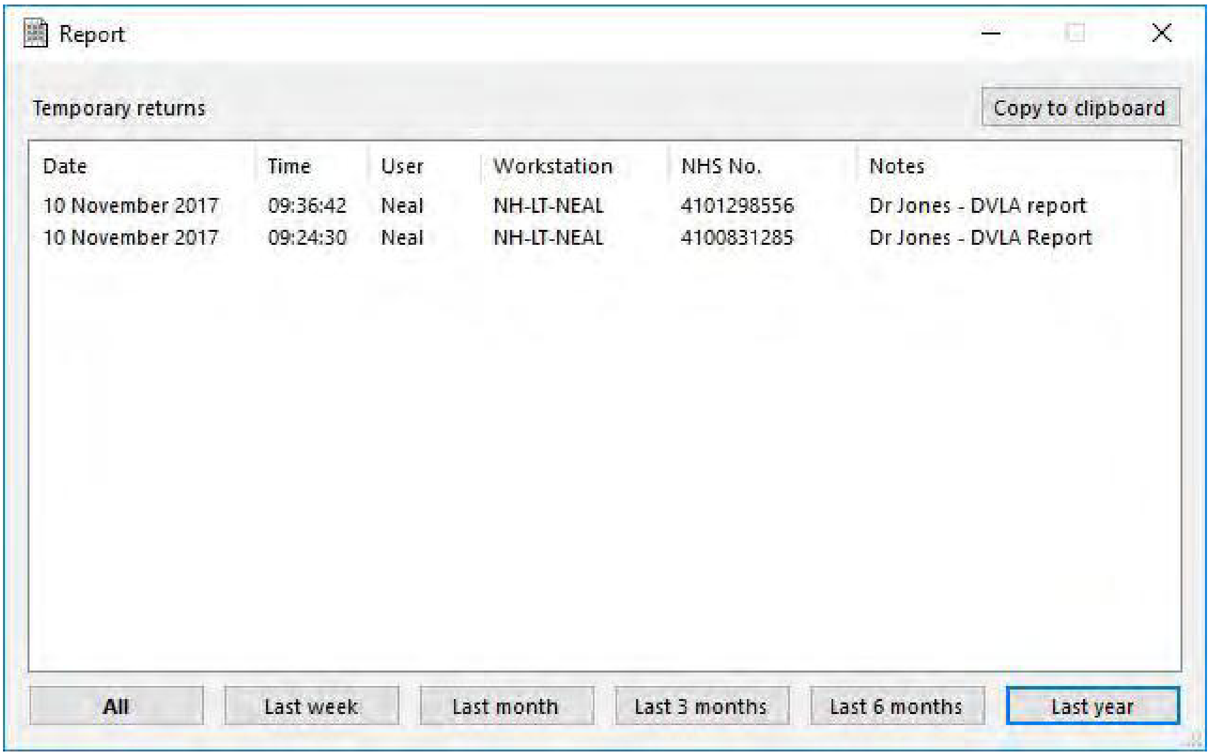
1. At the bottom of the screen you can define which type of activity you want to report on by clicking in the drop down arrow



2. Select the report you wish to run i.e. Temp. returns and click on 'Report'



3. This will now display all of the deductions you have requested



4. By default, all deductions are displayed but you can change this by utilising the date range buttons at the bottom of the screen.

   The following information is displayed: -

   a. Date and time of request
   b. What user requested the deduction (this is the network login)
   c. What PC they were sitting at
   d. The NHS number of the patient