**What are Special Patient Notes in Adastra Web Access?**

Special Patient Notes (SPN) in Adastra Web Access are notes that can be attached to a new or existing patient to alert or highlight any specific care requirements, long term care plans or any other item of useful information for the patient. They will show up in the main Adastra v3 system when the patient contacts the service.

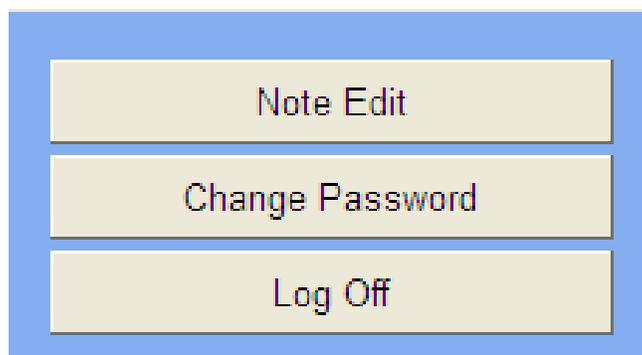**How to access Adastra Web Access**

Go to:

https://shropdoc.advhc.net/awa
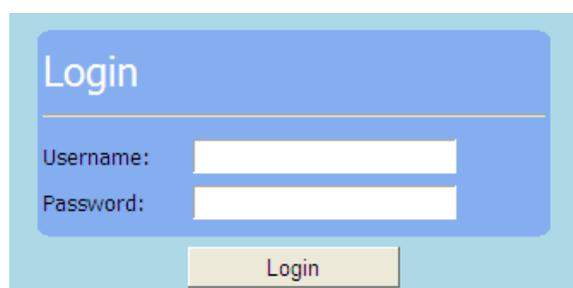
How to use SPN in Adastra Web Access

When logging in to Adastra Web Access, a list of menu options will be displayed (the exact options displayed will depend on configuration and user rights):

Note edit – adding a note for a new patient

To add a note for a new patient, open 'Note Edit' by clicking on the appropriate 'Note Edit' button. This will present a screen showing all the notes. (The screen shot below is from the surgery specific 'Note Edit'; the template specific 'Note Edit' will appear the

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same, but will not display the 'Show only my patients' and 'Show my surgeries' radio buttons.) Notes in red have passed their review date; notes in black are still valid. Be aware that notes that have past their expiry date will still be highlighted in Adastra.

In the Note Edit screen, all notes for your surgery are shown by default. ☑ Show hidden notes . Ticking this box will allow the viewing of any hidden (obsolete) notes on the system. Hidden notes may be relevant when creating a new note for an ongoing condition. A column titled 'Hidden' appears next to 'Doctor'; any hidden notes will have an ✗ in this column.
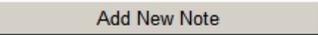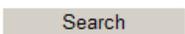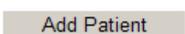

The list of notes may be re-ordered by clicking on the blue text in any of the column headers. The column by which the list is currently sorted has an asterisk (*) after the title. In the example above, the list is sorted by 'Review Date'.

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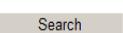
To add a new note, begin by clicking the [Add New Note] button. This will present the 'Search Criteria' page. On the left are the searchable fields (note that forename cannot be searched on alone alone) and on the right are four buttons. Click:
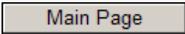
- [Main Page]   - to return to the main menu screen
- [Notes List]   - to return to the previous screen
- [Search]   - to search on the entered criteria
- [Add Patient]   - to add a new patient to the system and attach notes

The ☐ Show hidden patients checkbox (below the search criteria) can be used to search on hidden patients as well as current ones:

Note that only search for patients that have been recorded in Adastra as registered with your associated surgery will be returned from the search.

Enter the search criteria and click on the [Search] button. A message will be displayed at the bottom of the screen if no patient is found matching the search criteria:
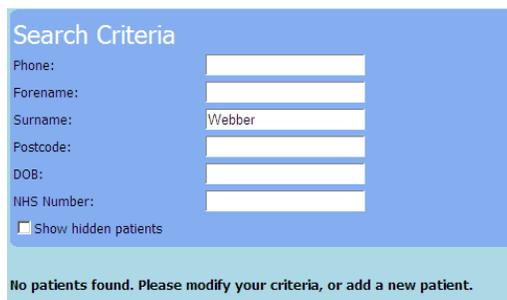
To add a new patient to the database, click on the [Add Patient] button.

This will display the 'Note Edit' screen which is broken down into six main sections:

1. Patient demographics

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2. Home address
3. Contact details
4. Note settings
5. Note questions
6. Notes

1. Patient demographics

The different sections of the screen may be completed in any order; this example will start with the 'Demographics' section.
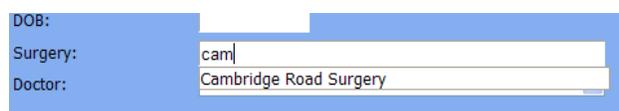
Select the patient's gender from the drop-down box as shown below, and type into the free text boxes to enter the patient's forename, surname and date of birth (in DD/MM/YYYY format.)
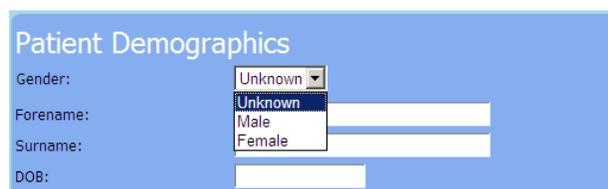
The 'Surgery' field is a lookup field which will allows you the recording off patient notes for patients registered with any of the surgeries that you cover. The lookup requires a minimum of three characters of the surgery name before any matches are returned. Once the possible matches are displayed, click on the appropriate one to select it.


Select the patient's doctor by clicking on the drop-down arrow next to the 'Doctor' field and choosing a doctor from the list. The doctors offered for selection will belong to the previously selected surgery. This field will not contain any doctor names until a surgery is selected.

There is also a field for recording an NHS number if required. However, this is not a mandatory field.

(Notice that the 'Surgery' field is greyed out in the surgery-specific "Note Edit" screen. This is because only new patients can be added to the surgery that the current login is associated to.)
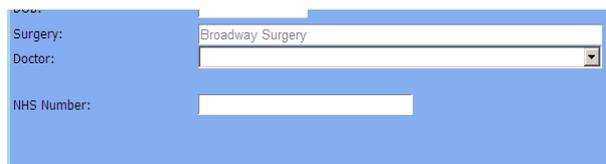
2. Contact details

The next section to be completed is the patient's contact details. To enter a number, click into the appropriate field and type the number. It will need to be a valid telephone number; the system will not accept the number and a warning will be displayed if too few or too many digits are entered.

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3. Home address details

The next section is the 'Home Address' details. The first part of this section is the 'Address Lookup' field. This can be used to search for the patient's address using part of their address, for example a postcode, or a combination of a house number and a postcode separated by a comma. Once part of the address has been entered, click the 'Lookup' button to perform the search. Any matches will be displayed and can be selected by double-clicking. If only one exact match is found, this will automatically populate the address fields.
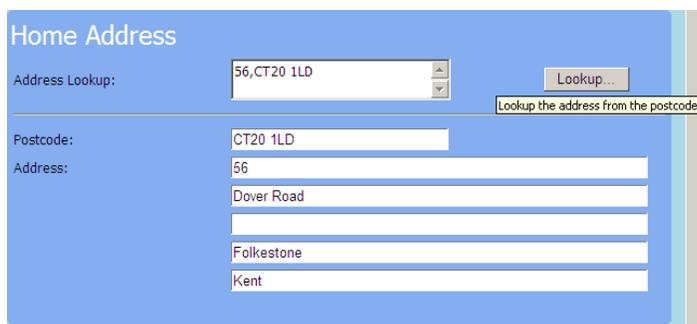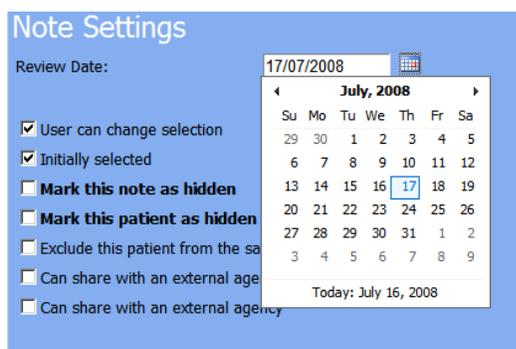

There is an area labelled 'Directions' where any additional information regarding the address can be stored. This is a free text box and can contain a large amount of text if needed.

4. Note settings

The next section of the screen is the 'Note Settings'. The first field available is the 'Review Date' field. The review date will automatically be set to six months from the current date, but this can be set to a more suitable date if required by using the small calendar icon to the right of the field. Clicking on this will bring up a calendar from which a review date may be chosen. Use the arrows either side of the month shown to navigate through the calendar to find a suitable date. Alternatively, type the date directly into the review date field.

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Underneath the 'Review Date' field there are seven checkboxes, which select various different options.
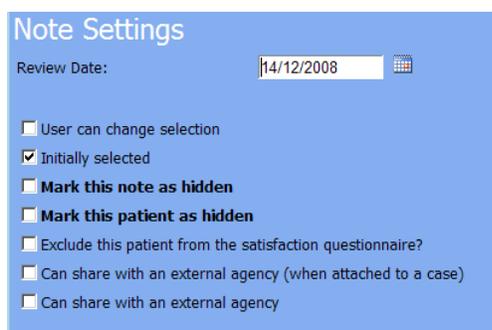
- **'User can change selection'**- sets whether the user entering a case for the patient can choose whether or not to attach the note to the case
- **'Initially selected'** - if checked, when the user entering a case selects the patient, the note will automatically be attached to the case
- **'Mark this note as hidden'** - makes the note obsolete, and no longer available to attach to the patient (this option is available when reviewing a note)
- **'Mark this patient as hidden'** - makes the patient record obsolete; can be used if, for example, a patient dies (this option is available when reviewing a note or patient record)
- **'Exclude this patient from the satisfaction questionnaire?'** - will stop a satisfaction questionnaire from being sent to the patient by the out-of-hours service, ie. if patient is incapable of completing the form, or is terminally ill and does not need to receive such communications
- **'Can share with an external agency (when attached to a case)'** - sets whether the note will be seen if the case is passed to external triage software for nurse assessment, for example

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- '**Can share with an external agency'** - Sets whether the note can be shared with other external agencies, eg. NHS Direct/ NHS24

5. Note questions

It is also possible to record information via a set of 'Note Questions', which are taken from a note template. There are several default question templates. Custom question sets can be created by Adastra if required. To choose a template, click on the drop-down arrow and select a question set by double-clicking it. The questions to be filled in will be displayed in the area below the selection box.

The 'Alter Template' button can be used to remove the current template and answers from the system. However, it is not advisable to change a note template once it has been used operationally.

(Note that in the template-specific 'Note Edit' screen, the 'Template' drop-down box and Alter Template button will be greyed out and unchangeable).
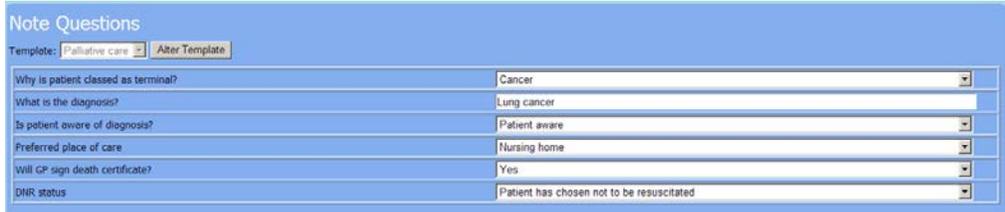
The example above shows a Palliative Care template. Questions can be of different types, including drop-down selection, yes or no, and free-text. It is also possible that certain questions may be displayed depending on the answer selected in a previous question. Some questions can be made mandatory; if a required question is missed, the system will display a warning prompting the user to select an answer.

6. Notes

In the large white box at the bottom of the screen, the current text can be edited for this patient note. This is a free text box and any text can be entered.

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There are two buttons available at the bottom of the screen; 'Update' and 'Cancel'. 'Update' saves any changes made to the note and returns you to the list of your surgery's patient notes. 'Cancel' will discard any changes and return to the list of the surgery's patient notes.

Note edit – editing or adding a note to an existing patient

1. Editing an existing note

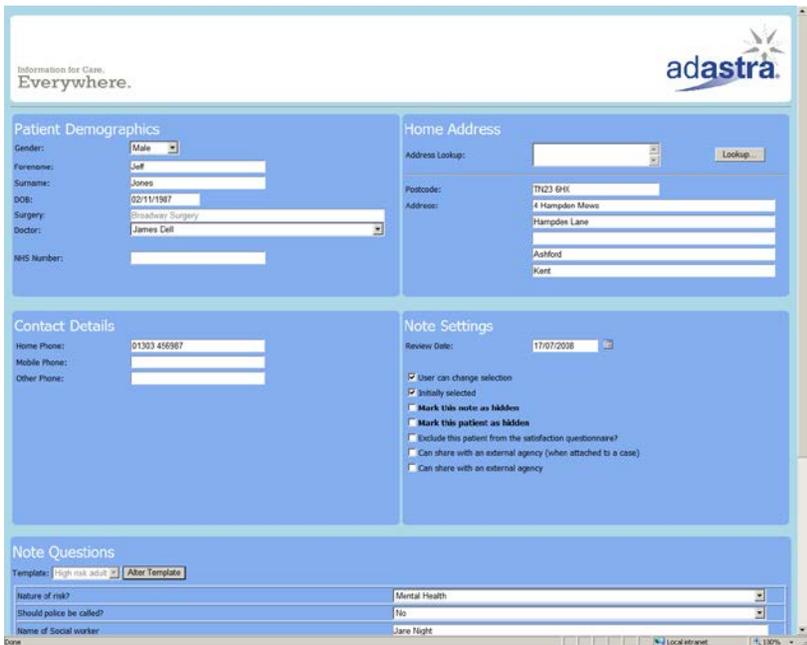From the list of notes, click on the blue Edit text next to the note to be edited.

The 'Note Edit' screen will be displayed complete with the patient's demographic details and current note information:

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Edit the patient and/or note details as appropriate as shown previously; in particular, the review date for the note may need amending. Alternatively, if the note is no longer appropriate for the patient, it can be marked as hidden.

2. Adding a note to an existing patient

Follow the steps on searching for a patient as detailed on page 5. The search results will be displayed below the search criteria section:

Once the correct patient record has been identified, click on the Create Note text in the Create Note column for that record (as highlighted). This will open the 'Note Edit' screen where the patient's demographics should already be populated. Details may also be amended or added in this screen, as in previous screens.

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Select the appropriate 'Note Settings' and the appropriate 'Note Questions' template, if required. Complete the 'Notes' section with the relevant information and click the 'Update' button to save the note.

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