SYSTEM FOR FOLLOW UP OF TEST AND RESULTS

Introduction & Definitions

The objective of these policies is to ensure that all investigations that are ordered by doctors are followed up efficiently, safely and confidentially and to ensure that no results are mislaid and that an audit trail is maintained for future reference. A general understanding of appropriate actions to be carried out is essential.

Definitions of intended action

No Action	When a patient rings in to be told: “No action- nothing further needs to be done.”
Return Urgent	Patient to be contacted by phone to make an appointment in the next 48 hrs where possible. When a doctor perceives that this particular test requires more urgent attention than the above, then it is the doctors’ responsibility to see that this is carried out.
Discuss	***Patient to be contacted by phone to make an appointment (non-urgent) to discuss the results.***
Non urgent apt	When the patient rings in to be told that the doctor would like them to make a non-urgent appointment in the coming 2 weeks

Doctors may add individual comments for reception staff to inform the patient.

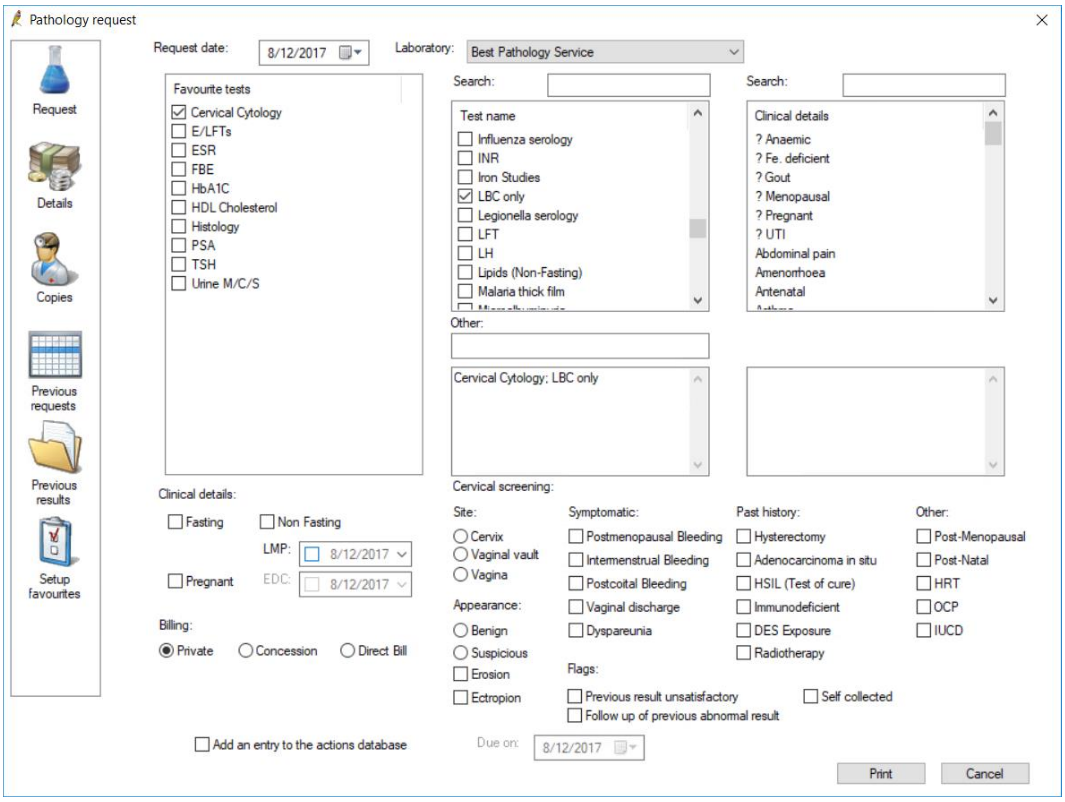
eg - INR- normal 2.5 – re-test in 3 wks.

Examples of routinely used **comments** are:

- No further action required
- Result within normal range
- Urgent action required
- Stay on the same dose
- Better than last time
- Specialist ordered test

Request pathology

1. From the patient record, select **Request** > **Pathology**. The **Pathology request** screen



   will appear.

2. Select the **Laboratory** to conduct the test.
3. If the test you are requesting is in your [Favourites tests] list, select the test. Otherwise, enter text into the first **Search** field to search for tests in the **Test name** list.
4. You can also enter a test as free text in the **Other** field.
5. Search for conditions requiring the investigation in the **Clinical details** list. Double-click a condition to print on the form. Add as many conditions as required.
6. Complete the **Clinicial details** fields at the bottom of the screen.

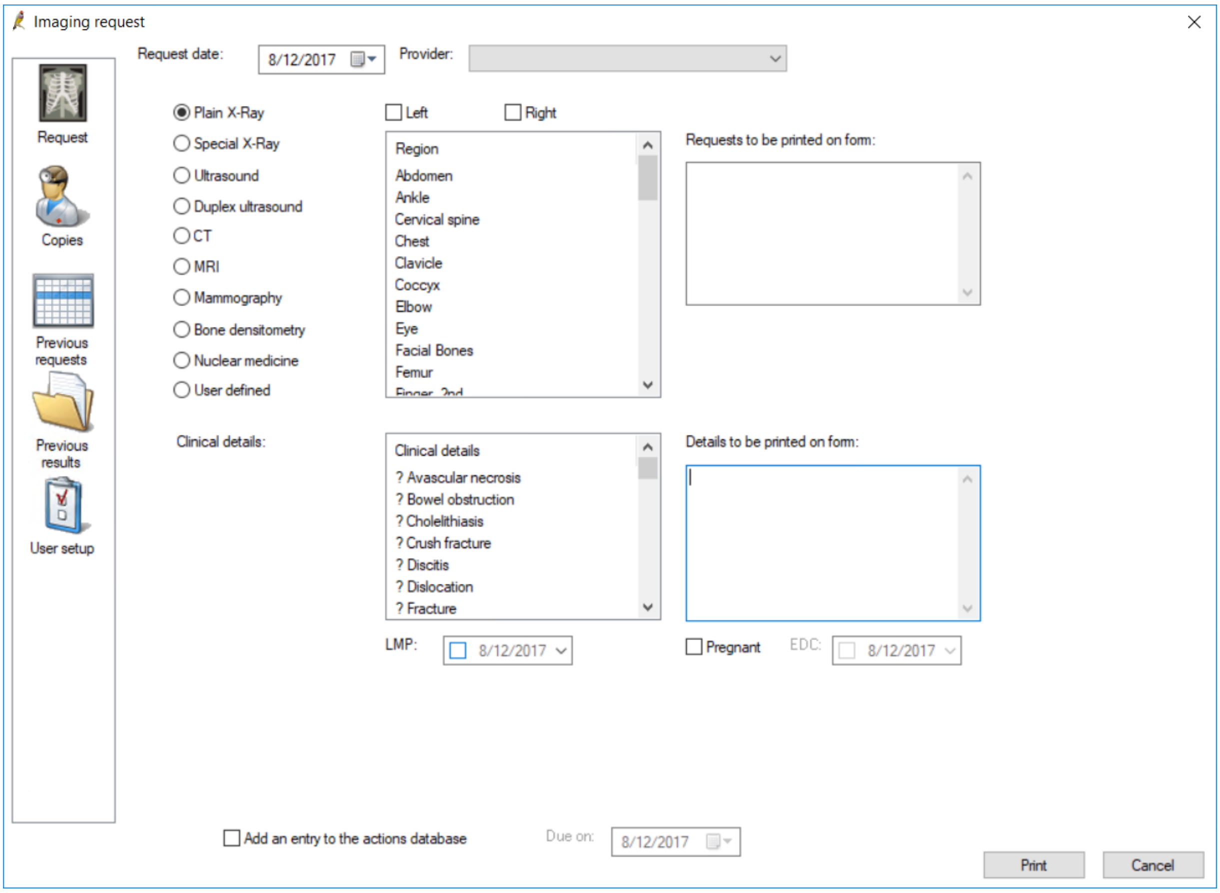
   If the pathology request is a cervical screen, complete the **Cervical screening** fields. See Cervical screening for more information.

7. Change the **Billing** type from the default, if necessary.
8. Tick **Add an entry to the actions database** to generate a staff Action for this request.

9. If the request is urgent, select the **Details** tab, tick **Urgent**, and enter the date the report is required in the **By** field.
10. If you need to send copies of the request, select the **Copies** tab. Select a **category** to display contacts and account holders in that category, and double-click an entry to add to the **Send copies to** list.
11. Click **Other** to manually enter copied-in parties.
12. The **Previous requests** and **Previous results** tabs show the patient's previous investigation requests and results.
13. If you are satisfied the request is correct, click **Print** to print the pathology request form on the selected laboratory's format to hand to the patient.

Request radiology

1. From the patient record, select **Request** > **Imaging**. The **Imaging request** screen will



appear.

2. Select the **Provider** to conduct the test.

3. Select the imaging type from the list of radio buttons.
4. If the type is not listed, you will have to create a user-defined custom test. Select the **User defined** radio button to see the list of custom tests.
5. Double-click in the **Clinical details** list to add conditions requiring imaging investigation to be printed on the request form. Add as many conditions as required.
6. Tick **Add an entry to the actions database** to generate a staff Action for this request.
7. If you need to send copies of the request, select the **Copies** tab. Select a **category** to display contacts and account holders in that category, and double-click an entry to add to the **Send copies to** list.
8. Click **Other** to manually enter copied-in parties.
9. The **Previous requests** and **Previous results** tabs show the patient's previous investigation requests and results.
10. If you are satisfied the request is correct, click **Print** to print the pathology request form on the selected laboratory's format to hand to the patient.

Managing Pathology and Radiology Results

Action results from the Provider Inbox

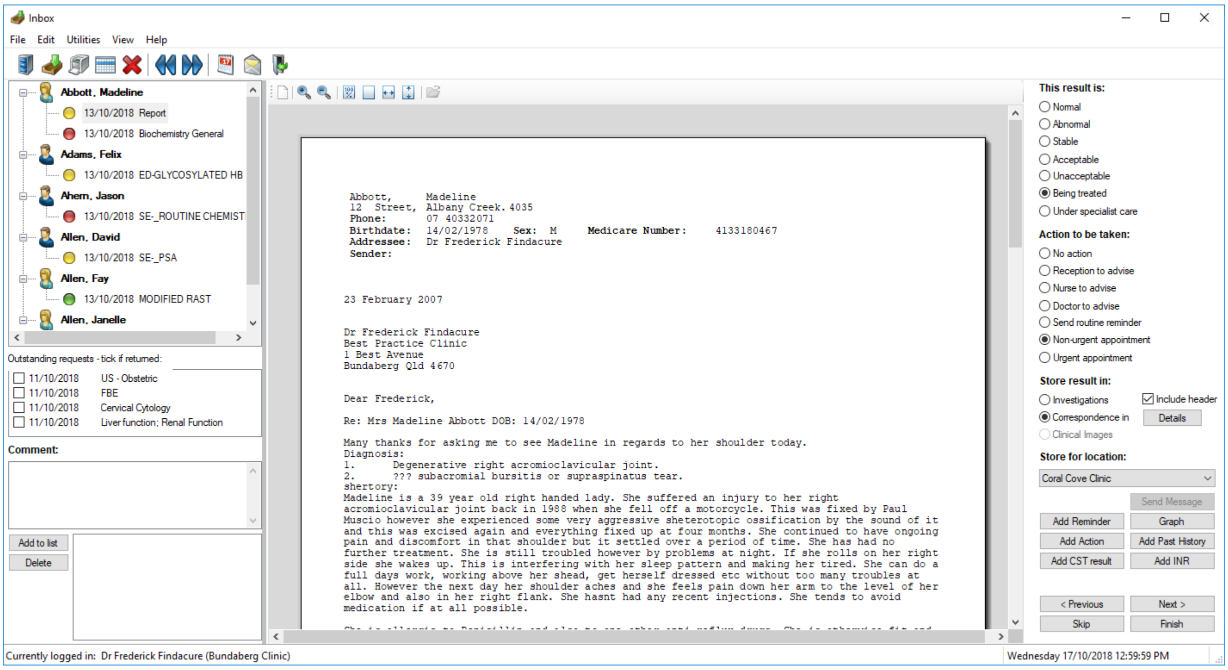
The Provider Inbox is used to check investigation results that have been imported from a pathology or radiology laboratory, action the result for followup, and save the result file to the patient record.

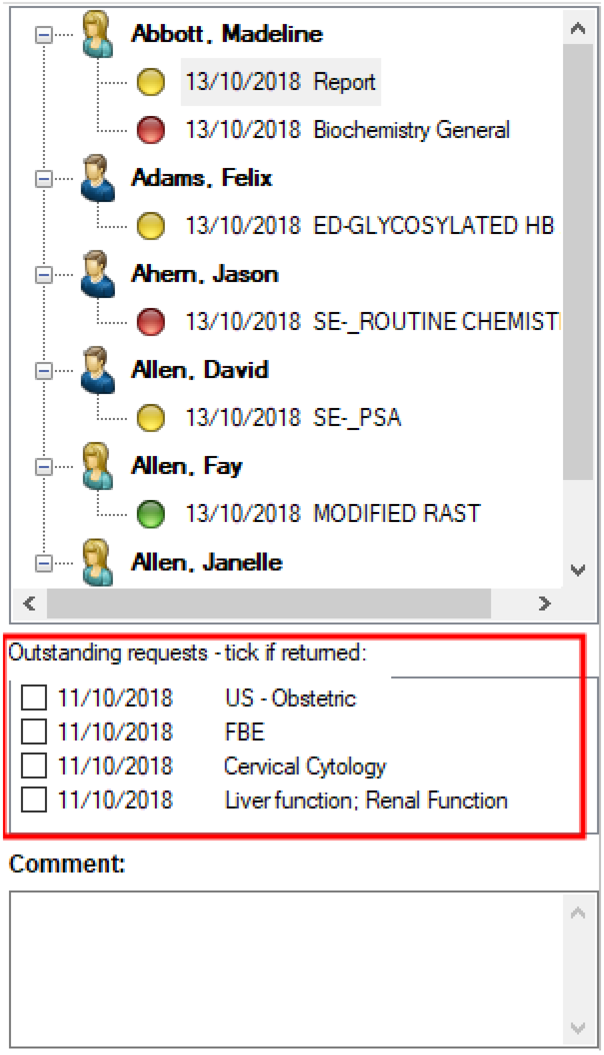
To access the Inbox, select **View** > **Inbox** from the main menu or press **F3**. The tree view on the left of the screen displays unactioned results by patient name.

Action an investigation result

1. Select **View** > **Inbox** from the main menu or press **F3**.
2. Select the result you want to action from the list on the left.

3. If the result is for an request that has not been marked as returned, tick the corresponding request in the **Outstanding requests - tick if returned** list.





4. Enter a **Comment** and click **Add to list** to add any comments about a result. For example, a comment might contain relevant information for another provider tasked with following up the result.

Action the result

5. Action the request by selecting from the following radio button sections from the right:
   - **This result is** — Clinical evaluation of result.
   - **Action to be taken** — Followup action. All actions except for ‘No action’ will add the result to the **Followup Inbox** for later actioning by the practice.

Store the result

Click a button to perform additional actions for the selected result and patient:

- **Store result in** — Where in the patient’s record to store the result.

- **Include header** — Tick to store the report header with the result.
- **Store for Location** — Practice location to store result for.

What else can I do in the Inbox?

View another doctor's Inbox

Providers can view each other's Inbox screens for results that have not been marked confidential. For example, a provider who goes on leave may ask another provider to review their Inbox to ensure urgent issues are addressed.

1. Select **File** > **Change Inbox** from the menu, or click the **Change Inbox** icon. The **Select doctor** screen will appear. This screen only lists providers who have results allocated to them.
2. Select a provider and click **Select**.
3. The Inbox will load the outstanding results for the new provider.

Book a recall appointment

A provider can also book a recall appointment directly from the Inbox.

1. Select **File** > **Patient appointments** or click the **Patient appointments** icon. The **Patient appointments** screen will appear, showing future appointments for the patient.
2. Tick **Include past appointments** to view historical appointments.
3. Click **New** to create a Recall (or ‘review’) appointment for the patient.

A recall system is used to recall the patient back to the surgery for discussion of abnormal results.

The newsletter contains a permanent request for patients to ring for their results.