Healthcare Improvement Scotland



# Document Management Pathway Example

| Document type | Emergency and Out of Hours services | Action |
|---|---|---|
| **Out of Hours (OOH)** | • Patient advised self-care. | File. |
| | • Patient advised to go to hospital. | File. |
| | • Patient advised to see GP;<br>➢ Check GP Extras - patient has already called Practice. | Add relevant info to appointment and place in acute tray. |
| | ➢ Check GP Extras - patient has not called the Practice. | File. It is the patient's responsibility to call if advised to do so. |
| **Minor Injury Unit (MIU)** | • Any diagnosed fractures/dislocations etc. | Code and File. |
| | • If admitted under orthopaedics or diagnosis is uncertain, await further correspondence for coding. | File. |
| | • Look for any child protection issues or adult safeguarding issues and pass to GP if concerns. | Workflow to GP if any concerns. |
| **Accident & Emergency (A&E)** | • Code any confirmed diagnosis, do not code query diagnosis, await further info. | Code and File. |
| | • Look for any child protection issues or adult safeguarding issues and pass to GP if concerns. | Workflow to GP if any concerns. |

| Document type | CLINIC LETTERS | Action |
|---|---|---|
| **Cardiology<br>Vascular<br>Rheumatology<br>Dermatology** | • What to look for in General clinic letters:<br>➢ Check for any diagnosis<br>➢ or new procedure<br>➢ Pacemaker fitted<br>➢ On home oxygen therapy.<br><br>• Check for anything that we have been requested to do:<br>➢ Provide further information<br>➢ GP follow-up<br>➢ Or GP appointment for review.<br><br>➢ Blood test.<br><br>➢ Changes to medication or new medication requests. | Code.<br>Add a recall date if new chronic disease to be reviewed annually.<br><br>Deal with yourself, if appropriate or workflow to GP, if clinical.<br><br>Invite patient, or set recall for future date.<br><br>Workflow to Pharmacist.<br><br>Always highlight and detail action taken before passing on or filing. |
| **Oncology/<br>Chemotherapy** | • New cancer diagnosis.<br><br>• Chemotherapy and Radiotherapy first cycle.<br><br>• Follow-up blood tests. | Code as new episode, and workflow to referring GP for information.<br><br>Code.<br><br>Invite patient, or set recall for future date. |
| **Community Alcohol and Drug Service (CADS)** | • Check if surgery asked to do anything or be aware of anything.<br><br>• Being put on Methadone programme/drug addiction therapy.<br><br>• List of meds that GPs are asked <u>not</u> to prescribe. | Add patient warning and file.<br><br>Code.<br><br>Workflow to Pharmacist if these are currently prescribed on repeat.<br>Add patient warning/ alert. |
| **Mental Health** | • New diagnosis.<br><br>• Blood monitoring requested or suggested. | Code and workflow to referring GP for information.<br><br>Invite patient, or set recall for future date. |

| Document type | Clinic letters | Action |
|---|---|---|
| **Colposcopy/ Gynaecology/ Family Planning** | • Nexplanon or coil insertion. | Code and add recall date |
| **Early Pregnancy Assessment Unit (EPAU)** | • Patient pregnant.<br>• Patient had miscarriage.<br>• Ongoing investigations and not sure if viable.<br>• If patient seeking a termination of pregnancy.<br>• Termination of pregnancy. | Code and file.<br>Code and file.<br>File, awaiting further correspondence.<br>File, awaiting further correspondence.<br>Code and file. |
| **New Pregnancy letter (May be Booking clinic, A&E or EPAU)** | • Confirmed pregnancy.<br>• Look for any medication requests, iron, folic acid, aspirin etc.<br>• Look out for any booster vaccinations needed following the birth.<br>• Patient diagnosed with Gestational Diabetes – code.<br>• Look for any child protection issues raised. | Code, and file.<br>Workflow to Pharmacist<br>Add recall for after Expected Delivery Date<br>Code and add recall for annual HbA1c.<br>Add patient warning/alert. |
| **Urology** | • Recall for PSA blood monitoring. | Return letter to decline ongoing monitoring. |
| **Consultant / Out Patient** | • Medication requests. | Workflow to Pharmacist. |
| **MDT meeting** | • Any new diagnosis or procedures.<br>• Medication requests.<br>• GP follow-up. | Code.<br>Workflow to Pharmacist.<br>Add recall, or contact patient to make appointment. |
| **DNA Letter** | • Check patient contact details on the letter (if given) are correct. | Provide correct contact details if different.<br>If same, File. |
| **Patient Appointment Allocation** | • Check contact information for patient is correct (if given). | File |

| Document type | Diagnostics | Action |
|---|---|---|
| **Aortic Aneurysm Screening** | • Abdominal aortic aneurysm screen. | Code and file.<br><br>Code any abnormal results and pass to referring GP for info. |
| **Ambulatory BP and ECG** | • 24-hour BP results.<br><br>• ECG results. | Workflow to GP.<br><br>Workflow to referring GP. |
| **Bone Density Scan** | • Bone Densitometry.<br><br>• Check to see if been diagnosed with Osteopenia or Osteoporosis.<br><br>• Follow-up requested.<br><br>• Medication recommended.<br><br>• Any other treatment suggested. | Code and file.<br><br>Code and file.<br><br>Add recall.<br><br>Workflow to Pharmacist.<br><br>Workflow to GP. |
| **Endoscopy Gastroscopy, Colonoscopy Sigmoidoscopy** | • Any procedures such as polypectomy etc.<br><br>• Any proven diagnosis.<br><br>• If possible malignancy, wait for further info before coding, for example biopsy results.<br><br>• Any medication requested.<br><br>• If diagnosis from GP referral, or there is info a GP should be aware of.<br><br>• If no further action. | Code.<br><br>Code.<br><br>Wait for further info before coding.<br><br>Workflow to Pharmacist.<br><br>Workflow to GP.<br><br>File. |
| **Home BP monitoring** | • View Report. | Code average BP.<br><br>Workflow to Nurse. |
| **Retinal Screening** | • Check code is entered into patient notes automatically.<br><br>• DNA letters.<br><br>• Has screening picked up an eye problem not related to diabetes and requests Ophthalmology or GP to follow up. | Code and file.<br><br>File.<br><br>Workflow to GP. |

| Document Type | Discharge letters | Action |
|---|---|---|
| **Mother and Baby Discharge letters** | • Letters should be scanned onto the Mother's record.<br>• Code birth of the baby, for example spontaneous vertex delivery or caesarean delivery, put in coding notes the gender of the baby.<br>• If patient pregnant still in summary.<br>• If Mother has needed blood transfusion.<br>• If premature delivery.<br>• Look for any child protection issues or adult safeguarding issues.<br>• If any follow-up requested, for example bloods, injections. | Code.<br>Right click to remove from summary.<br>Code.<br>Code.<br>Workflow to GP if any concerns.<br>Add Recall. |
| **Ward Discharge letters** | • New diagnosis or procedures.<br>• Pacemaker fitted.<br>• Medication changed or requested.<br>• Any allergies and sensitivities noted.<br>• Check for advance directives started in hospital, for example Do Not Attempt Resuscitation, Adults with incapacity forms, RESPECT forms.<br>• Look for any child protection issues or adult safeguarding issues.<br>• Highlight anything that you think the clinicians should be aware of and pass to the relevant person. | Code.<br>Code.<br>Workflow to Pharmacist.<br>Check if already recorded. If not, enter them.<br>Workflow to GP so that Key Information Summary (KIS) can be updated.<br>Workflow to GP if any concerns.<br>Workflow to appropriate clinician. |

| Document Type | Miscellaneous | Action |
|---|---|---|
| **Change to personal details, name/address etc** | • Note and deal with any changes to address shown on discharge letter. | Action changes and file. |
| **Optician Letter** | • New diagnosis.<br>• Patient been referred to another department (Ophthalmology for example).<br>• Request to refer patient to another department (Stroke for example).<br>• Medication requests.<br>• Follow-up with practice requested. | Code and file.<br>File.<br>Workflow to GP.<br>Workflow to Pharmacist.<br>Add recall, or contact patient to make appointment. |
| **Physiotherapy** | • Notification of self-referral.<br>• Notification of referral from another department.<br>• Discharge notification. | File.<br>File.<br>File. |
| **Central Pharmacy** | • Any action recommended.<br>• Medication review complete. | Workflow to Pharmacist.<br>Code and File. |