

<b>Work Instruction</b>	<b>Note management within oncology clinical trials</b>
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<b>1.0</b>	<b>Purpose, Scope &amp; Objectives</b>
	To ensure the patients paper clinical notes are traced accurately and quickly within the department to avoid being mis-placed or lost. UHPNT uses the iPMS system to trace notes across departments, the oncology clinical trials department wanted to further improve on their local management of this process by developing a local work instruction.
<b>2.0</b>	<b>Personnel &amp; Responsibilities</b>
	All Oncology Clinical Trial Staff
<b>3.0</b>	<b>Background</b>
	Being able to quickly locate a patient's clinical notes is important across all departments within the hospital. Oncology clinical trials regularly request, store, review and return patients notes as part of looking after a patient on a clinical trial. The process of accurately recording the location of the clinical notes is done via iPMS (integrated Patient Manager System) and is called tracing. By reviewing local departmental practice the following instructions were drawn up and distributed.

<b>4.0</b>	<b>Definitions</b>
	iPMS – integrated Patient Manager System
<b>5.0</b>	<b>Health &amp; Safety</b>
	As per Trust policies and guidance: - Information Governance Policy V5 (January 2019) - Notes Management Policy
<b>6.0</b>	<b>Equipment &amp; Documentation</b>
	Access and training on using the iPM system is required for all staff who use patient clinical notes.
<b>7.0</b>	<b>Procedure</b>
	<p><b>Notes for Clinics:</b></p> <p>Notes will arrive from Bush Park in blue boxes or bags for any RESONCDF or ONCOREDF clinics we have (not for nurses clinics). Trace in notes for clinics immediately. All notes that arrive into the office whether from Bush Park or other areas of the Trust <b>must</b> be traced in via iPMS by the F/T administrator, or if not available, the P/T administrator or a member of the administration team <b>as soon as they come in</b>. This will save time hunting in blue boxes for notes.</p> <ul style="list-style-type: none"> <li>• If notes are for a clinic, then the tracing must be '<b>Derriford Departments</b>'; '<b>Oncology Clinical Trials</b>' and '<b>Clinic</b>'. In the 'notes box' ensure a note is left as to where they are traced i.e. '<b>appointment shelf/typing shelf/cupboard</b>' and put notes on the appointment shelf.</li> <li>• These will be prepped by the F/T administrator and placed in a trolley for the clinics. Following the clinicians appointments, F/T administrator will place them on the typing shelf. If notes are taken by a nurse for a clinic downstairs or to a nurses desk for use on a particular trial, they <b>must</b> be traced to that nurse/clinic by admin. For speed, we are currently using a '<b>patients location sheet</b>' for staff to sign/put patient label on to say they have taken them (these sheets are now located on notes cupboard door and above typing shelf).</li> <li>• Returning nurses clinic notes. If the notes do not need a letter typed then they will <b>NOT</b> go on the typing shelf. These will be traced back to Bush Park daily by admin but <b>always</b> check iPMS to ensure the patient has not got an appointment within the next 7 days. However, if the patient is receiving <b>regular treatment</b> or are returning in the next week or two then they can be filed in alphabetical order on the top two shelves of the notes cupboard.</li> <li>• If notes are not needed to file letters following typing, then they will also need to be returned to Bush Park following an appointment check on iPMS for the patient. Unless patients are returning for a clinic here in the very near future or are receiving regular treatment i.e. weekly/fortnightly/regular chemo they will be returned to Bush Park.</li> </ul>

	<p><b>Returning Notes:</b></p> <p>If notes are taken from here by a member of staff outside our department please trace out to that department. Notes sent back to Bush Park they <b>must</b> be traced out: '<b>Central Records Library</b>', '<b>Returned</b>', '<b>RCRF</b>' (or wherever they have gone within the Trust). Always note if they are in a blue box or orange bag and are labelled with the date are where they are from. If more than one box/bag is being returned to Bush Park, number the boxes on the 'return sticker' that goes at the side of the blue box.</p> <p><b>Notes for Monitors:</b></p> <p>Administration will order notes following searching Edge or looking on the calendar for monitors appointments.</p> <ul style="list-style-type: none"> <li>• Trace in: '<b>Derriford Departments</b>', '<b>Oncology Clinical trials</b>', '<b>Monitor visit</b>'. Please type in notes which trial it is.</li> <li>• Trace out the notes when they go over to the monitors room. When the monitors have finished with them, Data Managers will return them back to admin. Admin will check for any upcoming appointments and send back to Bush Park using the usual process.</li> <li>• If there is a clinic appointment due anywhere in the Trust within the next few days for the patient, trace them back to our cupboard and someone will collect them from that department.</li> <li>• The remaining free shelves could be used by Data Managers for monitor notes prior to monitors visits. The shelf will be labelled. Once used by the monitors, they will be returned to <b>Bush Park</b>.</li> </ul>
<b>8.0</b>	<b>References</b>
	<p>Trust policies and guidance:</p> <ul style="list-style-type: none"> <li>- Information Governance Policy V5 (January 2019)</li> <li>- Notes Management Policy</li> </ul>
<b>9.0</b>	<b>List of Appendices</b>
	N/A
<b>10.0</b>	<b>Document Control</b>
	<p>All Work Instructions are stored on the shared research drive: G/Research Common/Training &amp; Education/How To work instructions/</p> <p>Printed copies are not controlled and therefore may not be the current version of the document.</p>
<b>11.0</b>	<b>Training Record &amp; Competency Assessment</b>
	<p>Records of the training and competency assessment for this work instruction shall be retained by the nominated educator for the staff group involved.</p> <p>All staff members have a responsibility to retain their own training records for continuing personal &amp; professional development.</p>
<b>12.0</b>	<b>Monitoring Compliance and Effectiveness</b>
	? Audit ? How could we monitor this?
<b>13.0</b>	<b>Revision History</b>

	Issue 1 – First issue
<b>14.0</b>	<b>Managerial Approval</b>

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