Oncology LTFU Follow Up Tests

This solution allows tracking of future test dates for Oncology LTFU patients. It consists of three components:

- An electronic form through **Ad Hoc Charting in PowerChart** to enter the data on when tests are due, and when they are booked.
- A **report in Explorer Menu,** to display what tests are due within a specified time frame.
- A **Clinical Note in PowerChart** to print reminder letters to send to patients / carers on when these tests are due.

Open the Oncology LTFU Future Tests Form

The Oncology LTFU Appointments form is used to enter the information on when the tests are due.

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Note:	Because the form is a piece of clinical documentation in the eMR (PowerChart), admin staff cannot currently enter the data. They can, however, run the report.

To enter data:

- Open the patient's chart in PowerChart.
- Click on the **Ad Hoc** charting button on the toolbar.
- In the Ad Hoc chart window, choose the Oncology folder (left frame), then select the **Oncology Long Term Follow Up Future Tests** form (right frame). You can double-click the form, or click once and then click **Chart.**
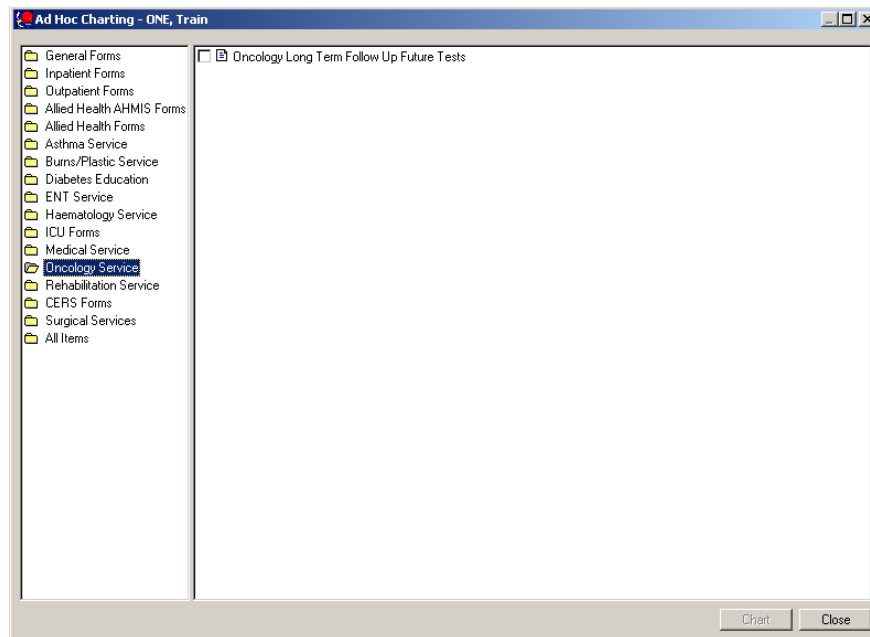
- The form will open.
- The form consists of one page, showing a table for data entry, and a 'read-only' text field that lists if the patient has had pathology or medical imaging tests posted in PowerChart. This information corresponds to the tests that the service keeps track of (you would have to go to the Results tab in PowerChart to view the actual results).
- Previous entries into the table will copy forward, but can be deleted or added to.

The yellow fields on the form indicate mandatory information is required. These are mandatory as the report will not work without the name of the test and the date it is due.
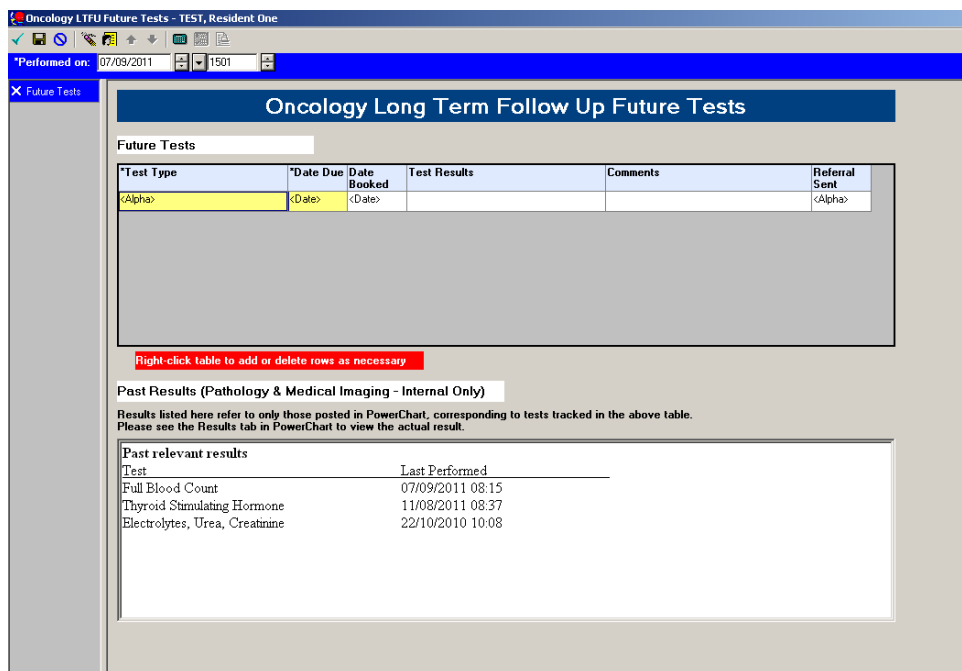
To add a new test:

- Click **<Alpha>** in the first field, and from the list that appears, select the desired test type.
- Click or tab to the next field (press Spacebar to activate the popup if you tabbed there), and enter the date the test is due.
- Complete the other fields as appropriate.
- To add another test, right-click on the table and from the submenu, select **Add Row.** Enter the data as above.
- If the due date for a test has passed, and you wish to remove that row from the table, right-click on the row, and select **Delete Row**.
- Right-click on the table and select **Clear** to delete all rows from the table.

Information:	The report looks for the last-created form for each patient. If you delete a test from the form before its due date, it will not appear on the report, even if it is still listed on older versions of the form.

Tip:	If a reminder letter has been previously sent, and the patient confirms when the test is to be held, you may wish to update the information in PowerChart. To update information, you should create a new form, as described above. The old information will copy in, and you can modify/add to it as necessary.

You can view what is documented on the forms from the **Clinical Notes** tab in PowerChart, and from the folders on the left, navigating to the **Oncology Service**, then locating the **Oncology LTFU Late Affects Appointments** documents.

Oncology LTFU Tests Due Report

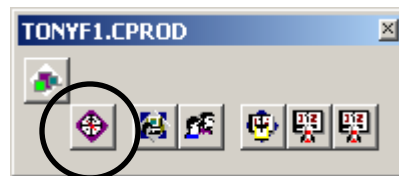The report to summarise which patients have tests due is in **Explorer Menu**. You can get to Explorer Menu from:
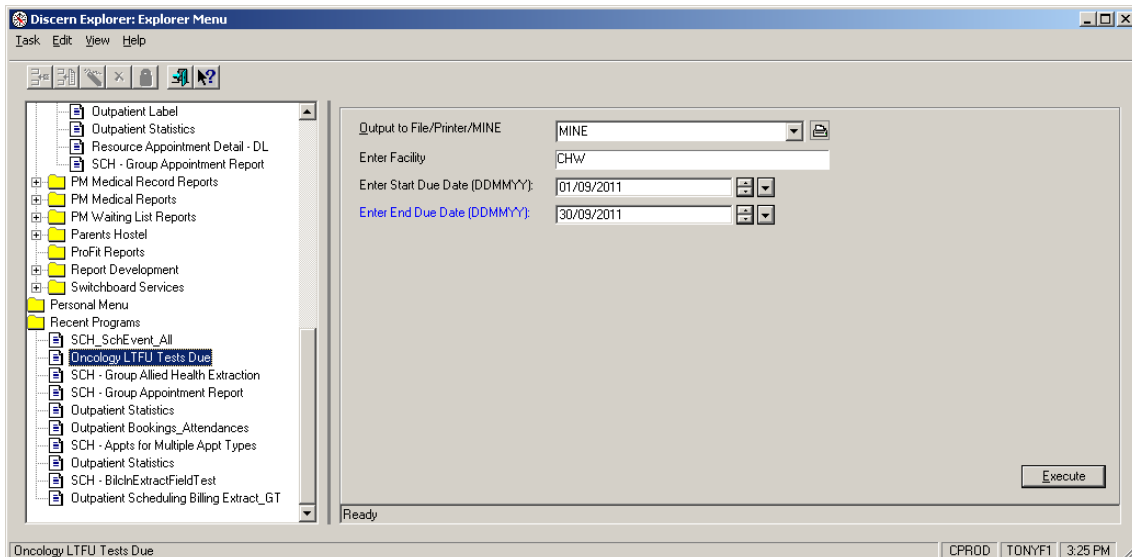
1. PowerChart toolbar	2. Patient Management App Bar
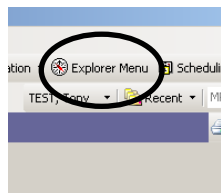
Please contact the IT Service Desk if you have difficulty locating these buttons.

The report is located in the folder structure on the left, under **Main Menu → PM Clinic Reports → Oncology LTFU Tests Due**. The report lists all details entered on the form (except comments), as well as the next Oncology LTFU appointment booked for the patient in Patient Scheduling.

- Click once on the report to select it.
- In the Input fields, leave the Output to File set to MINE (this means onscreen). Leave Facility as CHW. Enter the start and End dates for the required period. Note that if you select a long period, the report may take a long time to run, or worst case, will freeze the system. It is best to run for one month only.
- Also note that if the <u>Start Date and End Date must be different</u> in order to return any results.
- Click **Execute** to run the report.

When it is finished, click the Printer button to print the report (you may have to select your printer).

## Oncology LTFU Appointment Reminder Letters

The patient reminder letters are generated from within PowerChart, on the Clinical Notes tab. At present only clinical staff can generate the letters, as they are part of the patient's medical record.

The letters read information from the form, and can also vary content based on the patient's age, with different text printed for <18 year olds, and 18+ year olds. You can edit the content of the letter before signing it, but note that the patient address is positioned to sit in the window of an envelope, for mailing.

To create the letter:

- Open your patient's chart, and click on the Clinical Notes tab.

- Click the **Add** button.

- In the Add Document window, select Oncology LTFU Appointment Reminder Letter. The letter will automatically be generated for this patient, including all tests entered on the form within the next 6 weeks. (Note, you cannot enter a search date range in the letter, like you can in the report).

- Where a test is due, it will include the instructions for attending that test, based on the patient age. Where a test is already booked, that will be noted on the letter, and you can highlight and delete it if desired.
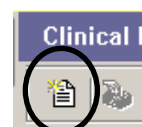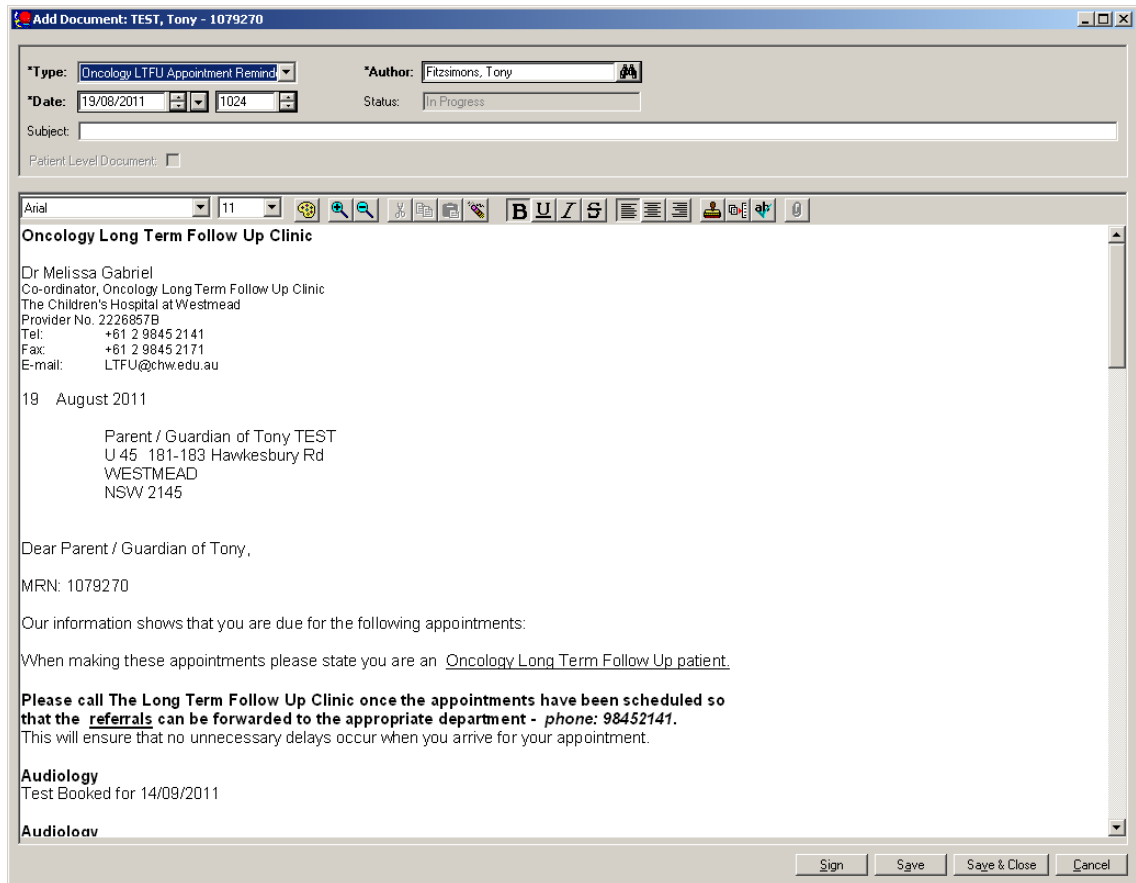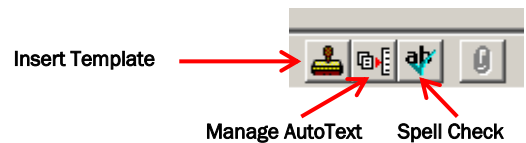
- Edit the letter as desired. (There are some parts locked, e.g. the patient's name and address).
- If a test is not listed on the letter because was outside the 6-week period, you can type the necessary text, or add the text from an *associated template*.

To add text from an associated template:

- Click on your document where you want to place the template.
- Click the **Insert Template** button.
- From the **Template Selection** window, choose the desired associated template, and click **Insert**.
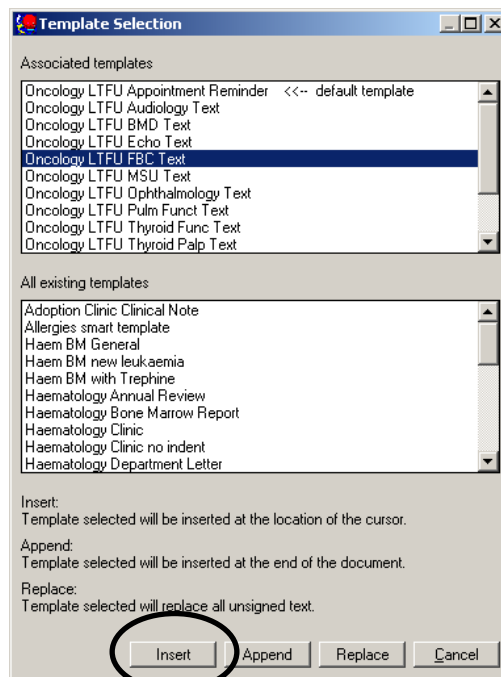
- The template you selected will be inserted into the document.

To complete the letter, type your signature/designation and contact details, or you can use auto text to insert this for you. (See the Quickstart for **Creating Auto Text** on how to create your signature block of text).

- Click on your document where you want the auto text.
- Type the first few letters of your assigned shortcut. When the auto text description pops up, press **Enter**.
- Your auto text will be inserted.
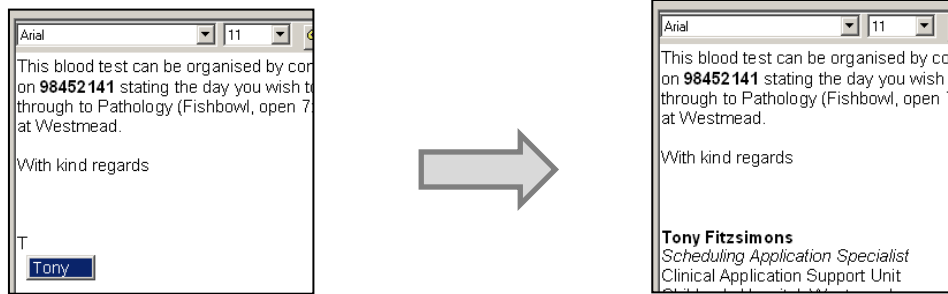
When your document is complete, click **Sign**. You will be given the option to view your new document immediately, or you can view it later on the Clinical Notes tab for the patient in PowerChart.

To print the letter:

- Locate and open the letter in Clinical Notes.
- This letter is formatted to print on letterhead paper, so ensure you know which tray in your printer to direct it to.
- Click the **Print** button.
- Make sure you select *Draft Print Without Headers and Footers*, so that system-generated information is not printed to the letter.