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NHS

SevernSide

Integrated Urgent Care

Adastra Administration Tasks Handbook

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V1.2	Dan Cotton	29th August 2024
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04.08.2025	Lucy Grinnell	04.08.2026

Contents

Purpose

The purpose of the Handbook is to describe the processes for managing administration tasks associated within Adastra.

Special Notes

Special notes can be added to a patients Adastra record to hold important information regarding a patient and/or their care. All notes should be added within 24 hours, but ideally on the same working day.

Patient information is sent to brisdoc.careplan@nhs.net and can be received in different formats.

- Care plans
- Respect forms
- DNAR's
- SWAST Repeat Caller
- Advanced Decision to Refuse Treatment
- Treatment Escalation Plans (TEP)

This may be accessed from any site with a HSCN (secure internet) connection.

The Rota Team are responsible for the addition of special notes and should ideally be input onto Adastra the same day. Acknowledging the Rota Team work primarily Monday to Friday 9am to 5pm, special notes received after 4pm Monday to Friday and during the out of hours periods will be uploaded to Adastra until the next working day.

Setting email and Adastra Access

1) Log into the email account above.

2) Scroll to the bottom to the oldest email.

3) Login into Adastra.

4) Useful 'Tabs' to have open to deal with the messages are:

- Case Search,
- Case Edit,
- Patient Edit,
- Look-up Patient Details

Processing a Care Plan

Select the email you are dealing with.

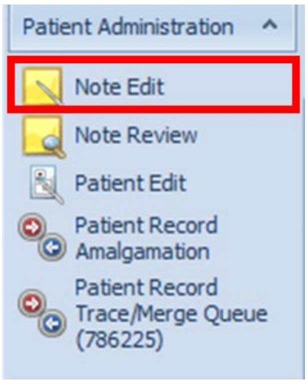
Place a Category on the email with your name so that we know who is dealing with this and to save duplicating work. To do this right click on the email select category and then your name.

If at any point we require confirmation on anything, reply to the email.

It is useful to put a tag on the email ‘Returned for further…’

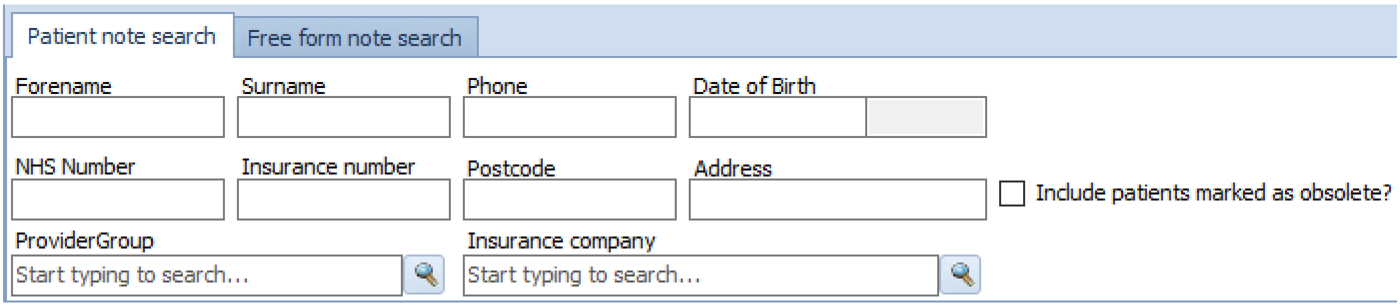
In this case a note still needs to be added but can just use the ‘EMIS template’.

Open Adastra, navigate to ‘Patient Administration menu and select ‘Note Edit’.



Then click ’Advanced’ in the top right-hand side.

Search for the patient you are looking for, ideally the Practice should have included an NHS number, input the information and press search. If you do not find the patient using the NHS number, search by the name and DOB.



You need to be confident that the patient you are adding is actually the patient, does all the information match?

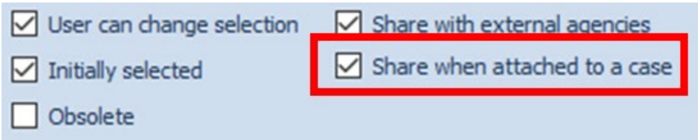
Select the correct patient and make sure they are highlighted.

Full Name	Home Phone	Address	Sex	Age
Donald Duck		Brisdoc Healthcare Services Ltd 21 Os...	Male	20 years

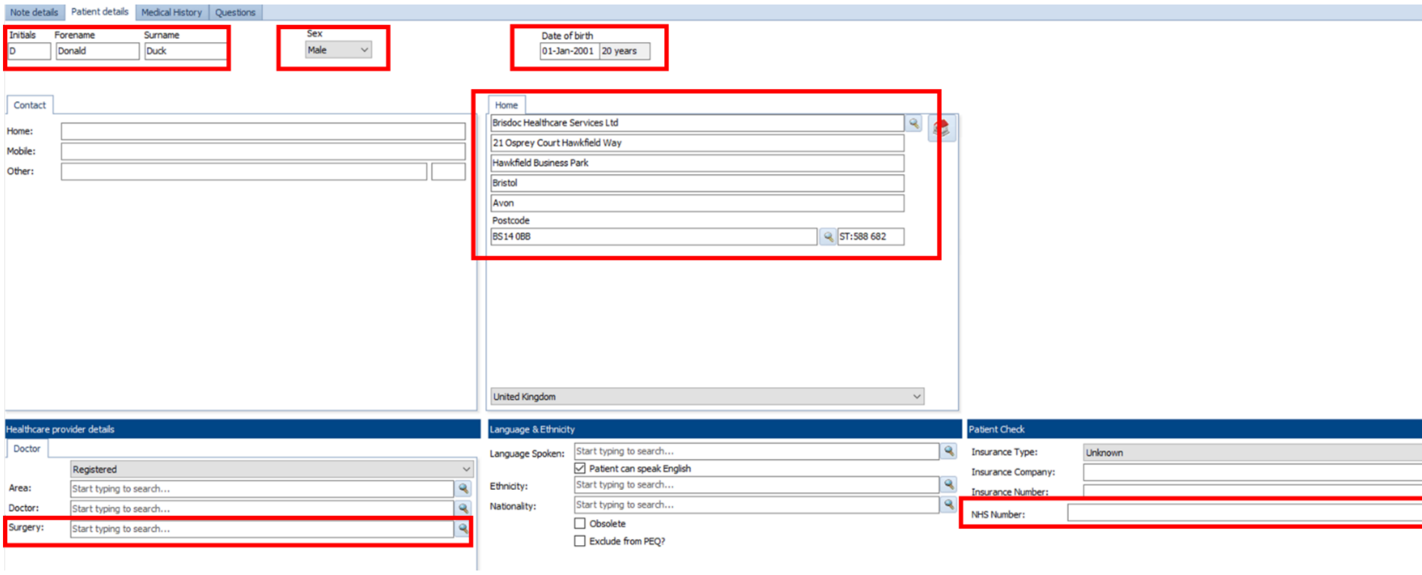
Click ‘New note…’.

The new note template will automatically default to ‘Basic note’, please ensure this is the template you use.

Make sure you tick ‘Share when attached to a case’.



Go to the ‘Patient details’ tab and confirm the demographics are correct. Have they changed Practice or address?



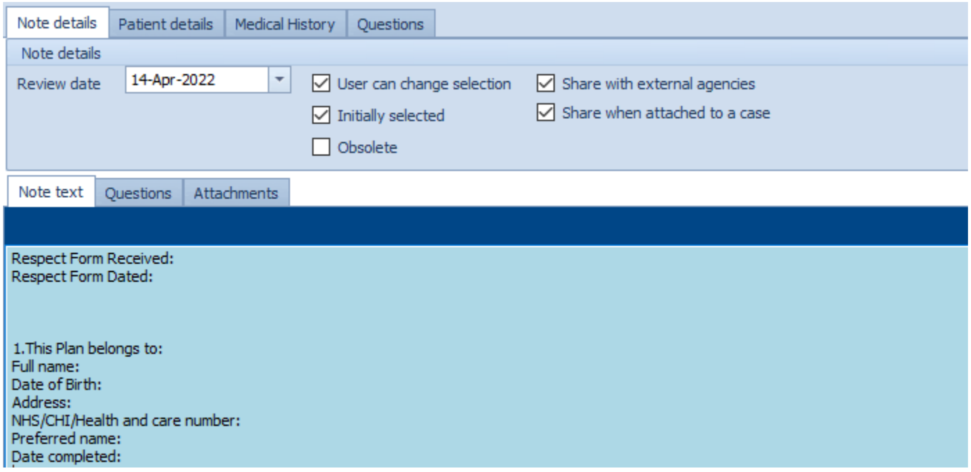
Download the template wording document from Radar

*** RESPECT FORM 2 ** ADDED 15.10.2020 **

Respect Form Received:

Respect Form Dated:

Copy and paste the relevant template into the special note using the ‘Note details’ tab.



Using the attachment emailed to us to either copy and paste the information or type ensuring that all information is copied across and is clear what we have added.

The main points to note:

- If information is unclear, do not guess
- If there is an abbreviation, leave it as an abbreviation
- Use each other, if you are unsure then ask

Try to make the information as clear as possible, below is an example of how to make the information to stand out.

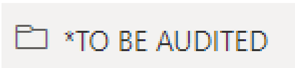
1. This Plan belongs to:
Full name: **DONALD DUCK**
Date of Birth: **01/01*2020**

Once you are happy that all the information has been completed, go back over and double check to see if there is anything you can see that does not match.

Once complete press 'Update' in the bottom left of the screen.

Reply to the sender letting them know the records have been updated.

The email needs to be moved from the Inbox to the 'TO BE AUDITED' folder.



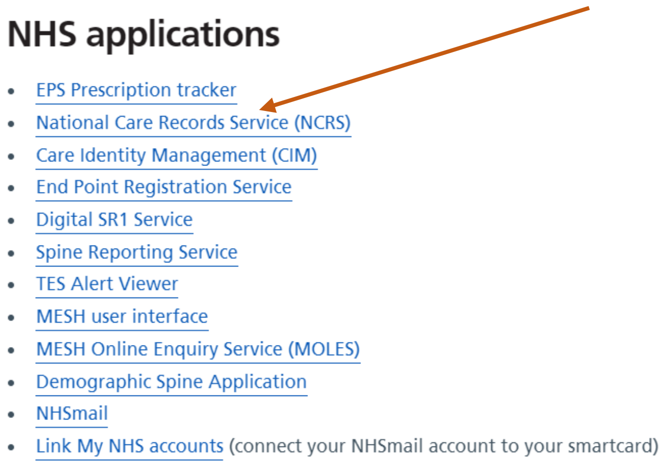
Audits

To ensure process are being completed to the required quality standard there are a number of quality audits that are carried out. Audit frameworks are in place for the following processes and the full frameworks can be found in the appendices:

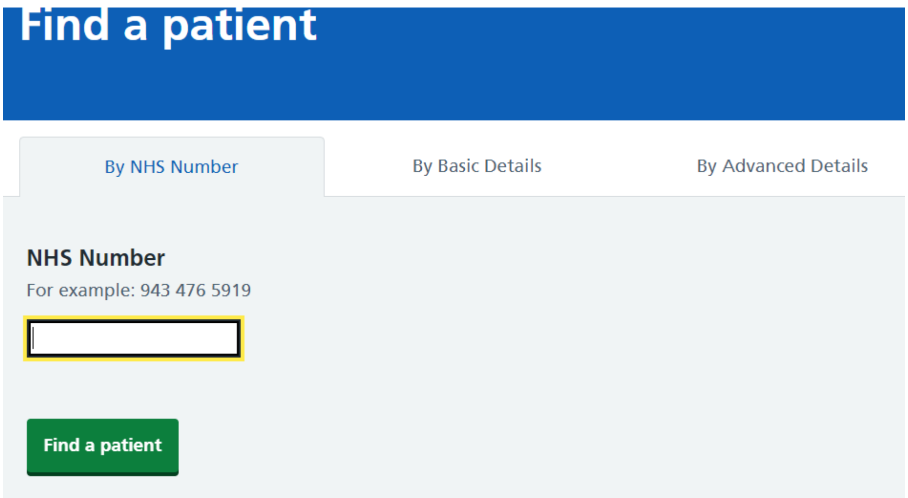
- Patient Special Notes (appendix two)

Appendix One – National Care Record Service (NCRS)

- Open **Smartcard Management** from Weblinks – **National Care Record Service** – https://portal.spineservices.nhs.uk/nationalcarerecordsservice/app/landing



- using the patients NHS number (if available), or patient details (using the basic or advance details tabs) search for the patient and look for their GP Practice



- If a GP Practice is shown on the **NCRS**, edit the case and add the GP Practice to the record – Go to **General Edits** – using the dropdown menu chose one of the following responses, and **Update.**

Appendix Two – Care Plan Audit Framework

Audits are completed on 5 care plans per person of the special notes entered.

The Rota Team Manager is responsible for ensuring the audits are completed monthly. Either by completing them themselves or delegating to a team member.

Audits need to be completed by a different person than the person completing the special note.

The template for auditing can be found in the S:Drive

Locate the ‘Care Plan Audit Template’.

Save a copy of the file into the Audits folder under in the correct month.

Save the file as ‘Care Plan Audit DDMMYYYY’ followed by your initials.

Open the mailbox and go to the ‘*TO BE AUDITED’ folder.

Flag five emails per person to identify for audit.

On the audit spreadsheet, complete the name of the person being audited, the auditor and date of the audit.

The various criteria have different weightings, with some being worth a maximum of 2 points, and others 4. Criteria worth 2 points can be scored at either 2, 1 or 0, and criteria worth 4 points are scored at 4, 2 or 0. Overall points are totalled, and a percentage score assigned.

Adastra Administration

Patient information		Effecive notes				General		
Patients Details Correct (Name, Address, DOB)	Surgery Correct	Identified need to go back to Surgery	All notes added correctly	Easy to read notes	Supplementary Information recorded	Share Ticked	Pt only record	Reply to Sender
Criteria 1	Criteria 2	Criteria 3	Criteria 4	Criteria 5	Criteria 6	Criteria 7	Criteria 8	Criteria 9

Criteria 1

Does the patient's demographics match?

Criteria 2

Is the patient's Practice correct?

Criteria 3

Have we identified the need to go back to the Practice? (If there is no need then =3)

Criteria 4

Have all notes been entered correct an no sections missed?

Criteria 5

Are the notes added easy to identify? Have we spaced information out?

Criteria 6

Has any supplementary information been recorded? (If there is no need then =3)

Criteria 7

Has the 'Share when Attached' box been ticked?

Criteria 8

Is this the only patient record? There should be no duplicated records.

Criteria 9

Have we replied to the sender informing them we have updated our records?

If there is anything that does not match or needs updating, this can be recorded in the comments section.

Comments
All correct

Please correct any errors identified in the comments section confirm complete in the actions column.

Actions
None

Finally, check if the special notes have been actioned within 24 hours during the week. If received between 4pm on a Friday and 4pm on a Sunday need to have been input by 4pm on a Monday.

Within 24 Hours?
Yes

Appendix Three – Care Plan Email Template

The template for the body of the email should read as follows:

Good morning/afternoon,

We have updated our records.

Thank you

BrisDoc Healthcare Services

T: 0117 937 0900

A: Unit 21, Osprey Court, Hawkfield Business Park, Whitchurch, Bristol, BS14 0BB

SevernSide
Integrated Urgent Care

BrisDoc
Supporting Pride
Because inclusivity leads to better healthcare

Change Register

Version	Date	Author	Comments
DRAFT 0.1	17.01.2023	DC	Document created, Merging PEMS, Amalgamations, Care plans and PLS SoP into one SoP.
1	29.08.2024	DC	Document published
1.1	06.11.2024	SE	Clarification of PEMS process for WPL teams and Rota team, to include the action required around GP replies and deleting sent items Page 5 – Clarification of re-issuing PEMS within Adastra Page 6 – Process for deleting emails for sent emails/overseas/unregistered patients Page 6 – Practice replies clarification of process Page 6- Follow up folder (Rota team) process Page 20 – Auditing Failed PEMS
1.2	01.07.2025	DC	Removal of all sections apart from Patient Special Notes. Other sections moved to CLEO Administration Handbook.