

# SevernSide

## Integrated Urgent Care

# Managing Special Patient Notes

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Bookmark not defined.

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**Appendix 2 – Special notes relating to patients on the Special Allocation Scheme (SAS).....** Error! Bookmark not defined.

**Version Control.....23**

## The Purpose of Special Patient Notes

Special Patient Notes (SPNs) are notes that are attached to a patient's IUC record. Their purpose is to make colleagues at SevernSide Integrated Urgent Care (IUC) (BrisDoc and Practice Plus Group), both operational and clinical, aware of key information that will help to improve the care of patients managed in our service and ensure patients and colleagues safety.

Some examples of SPNs are:

- Abusive behaviours care plan
- High intensity user plans
- Hospice care plan for a child
- Respect forms on patient's EMIS record

This SOP is created to ensure that SPNs are accurate and updated in a timely manner, with regular reviews. The SOP also clarifies the roles and functions across SevernSide in relation to the SPN process.

## User Access

The management of SPNs will be available to the following groups:

- Rota Team
- SPN Group
- HIU Group
- Governance Team
- SevernSide Colleagues

## Sight of SPNs

SPNs can be viewed by SevernSide IUC colleagues (BrisDoc and Practice Plus Group) who have access to the clinical system. This ensures that operational and Clinical colleagues can read the SPN regarding updates or specific care instructions for the patient.

## Creating SPNs

The creation of SPNs sits within the below groups:

### Rota Team

The Rota Team are responsible for the addition of SPNs within 24 hours of receipt. The Rota Team work primarily from 9am to 5pm, Monday to Friday. SPNs received after 4pm, Monday to Friday and during the Out-of-Hours periods will not be uploaded onto the system until the next working day. The Rota Team will upload SPNs to Share My Care and also copy all SPNs added to Aadastra, so that the notes are visible to NHS111.

In order to add a SPN, the community provider will send an email to [brisdockareplan@nhs.net](mailto:brisdockareplan@nhs.net) and this will be uploaded onto the system by the Rota Team.

New SPNs (excluding ReSPECT forms) will be emailed to the SPN Group via a shared inbox.

### HIU Group

HIU (High Intensity User) Group will add SPNs directly onto the system. SPNs are added for High Intensity User patients either following discussions in HIU meetings, highlighted by learning events, discussions with their usual GP or MDT meetings. The HIU team will upload SPNs to Share My Care and copy all SPNs onto Aadastra so that the notes are visible to NHS111.

### Governance Team

The Governance Team may receive SPN requests however, these will be forwarded to the Rota Team to follow the process in this SOP. The Governance Manager will retain the ability to add SPNs in exceptional circumstances.

## SPN Plan Types

In Share My Care there are several plan types with different usages as follows:

- **Aadastra SP Notes – Brisdoc Data Transfer** - This plan should not be manually selected by any user. This is used to support the data transfer of Special Patient Notes between Aadastra and Cleo.
- **Black Pear ReSPECT Form** - This plan should not be manually selected by any user. It is used to populate the data for BlackPear Respect Forms within the Cleo Application.
- **High Intensity User** - This plan will be used by the HIU group, to inform our teams of any important information for this patient and how to best manage their needs within our service. For details, please refer to the HIU SOP.
- **Respect Form Alert** - This plan will be used by the Rota Team, upon receipt of an email informing them of a respect form for a patient. Adding this note to the patient's record will inform our clinicians within the Cleo Application that the patient has a Respect form that they may need to be aware of. For details, please refer to the SPN SOP.
- **Special Allocation Scheme** - This plan will be used by the Rota Team, to inform our colleagues of a patient's Special Allocation Scheme status. For template SPN wording see Violence, Aggression, and Discrimination Prevention and Reduction Policy.
- **Special Patient Note** - This Plan will be used by the Rota team & SPN Group (the Governance team have the ability to add these in exceptional circumstances).

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- **Violence and Aggression** - This Plan will be used by the SPN Group, to inform our teams of any important information relating to any violent or aggressive behaviour & how best to manage this patient within our service. For template SPN wording see Violence, Aggression, and Discrimination Prevention and Reduction Policy

### Reviewing SPNs

The majority of SPNs will be reviewed, updated or made obsolete by the SPN Group and, in the case of High Intensity Users (HIUs), by the HIU Group.

### Rota Team

The Rota Team will update cases on both Share My Care and Adastral where there has been a patient death or an update regarding the Special Allocation Service (SAS).

### Deceased Patients

Deceased patients' information updates will be provided by community providers or SevernSide. The information received will allow the Rota Team to obsolete SPNs for patients that have died.

### SAS Patients

SAS patient information will be reviewed monthly by the Rota Team. The information received will advise if the patient has been added, removed or is continuing on the scheme. If SAS patients are removed from the scheme, the existing SPN will be obsoleted and a new SPN will be added to advise of the SAS removal. This will have a 5-year review date.

### HIU Group

SPNs relating to HIUs will be reviewed by the HIU Group prior to expiry of the review date.

The HIU Group will update their spreadsheet which will be used as a monitoring tool, to see whether a special note has been issued for a patient and the review date. Once these fields have been added to the HIU spreadsheet, it will provide assurance that SPNs are reviewed prior to becoming out of date and either extended or obsoleted where appropriate.

### SPN Group

The SPN Group are clinicians providing oversight who review SPNs. The SPN Group members are as follows:

- HIU Lead GP
- HIU Lead Clinical Practitioner
- Lead GP
- Head of Nursing and AHPs SevernSide
- Governance Manager (by invitation as necessary)
- Representation by IAP (Integrated Access Partnership) (by invitation as necessary)

The SPN Group will receive a weekly update to a dedicated email box for any existing SPNs requiring review and newly created SPNs. The mailbox will be reviewed and Care Plans reviewed weekly.

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The SPN Group will review SPNs and update or obsolete information as necessary on **both** Share My Care and Adastra. All active SPNs will be allocated a further review date using Clinical discretion.

The SPN Group will work with the IAP team where the SPN being reviewed needs IAP clinical input on an ad-hoc basis.

### Review Dates and Actions

The following teams are responsible for the actions summarised below:

**Table 1**

<b>Team</b>	<b>SPN type</b>	<b>Set Review Date</b>	<b>Action</b>
Rota Team	New Clinical SPN	2 weeks	Add SPN to system and email SPN Group for clinical review
Rota Team	Death notice	N/A	Obsolete
Rota Team	New Respect Forms	5 years	Add SPN to system. No review required by SPN Group
Rota Team	SAS new	6 months	Add SPN to system No review required by SPN Group
Rota Team	SAS removal	5 years	Add SPN to system No review required by SPN Group
SPN Group	New Clinical SPN	Clinical discretion (usually 6 month / 12 month / obsolete)	Review and set review date
SPN Group	Existing clinical SPN	Clinical discretion (usually 6 month / 12 month / obsolete)	Review note and set review date
HIU	New SPN	Clinical discretion (usually 6 month / 12 month / obsolete)	Add note and set review date
HIU	Existing SPN	Clinical discretion (usually 6 month / 12 month / obsolete)	Review note and set review date

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Please refer to the Violence, Aggression, and Discrimination Prevention and Reduction Policy for further information about special notes relating to patient's who have a history of violence or aggression including for the SPN template.

### Audit

The Rota Team and SPN Group will collaborate closely to ensure the efficient management and tracking of all SPNs monthly. To assure that correct process is being followed, a monthly audit should be carried out.

### SPN Group Audit

A sample of 5 random SPNs from all existing SPNs will be selected. This will be the responsibility of the SPN Team. This will be done for a trial period of 6 months and then reviewed as to whether this audit is required. The following audit criteria will be used:

- Is the review date appropriate?
- Is the SPN free from spelling mistakes?
- Is the SPN compliant with Caldicott principles which is that sharing information can be as important as the duty to protect confidentiality:
- Is the SPN free from confidential information? Where use of confidential information is necessary, each item of information must be justified so that only the minimum amount of confidential information is included as necessary for a given function.
- Is the SPN justified? Every proposed use or transfer of confidential information should be clearly defined, scrutinised and documented, with continuing uses regularly reviewed by an appropriate guardian.
- Does the SPN contain a clear management plan for the patient?

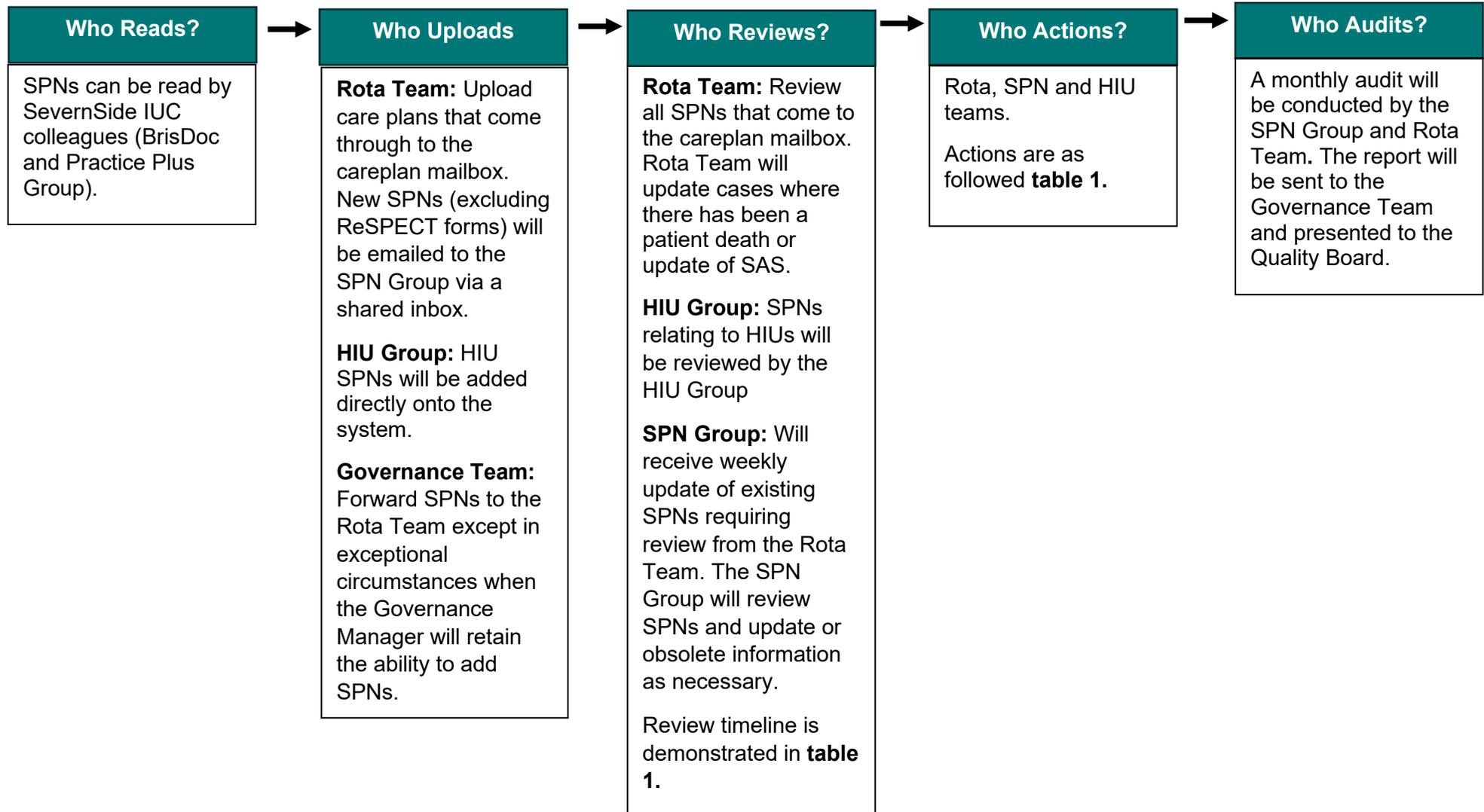
### Rota Team Audit

The number of SPNs with an expired review date and the oldest expired review date will be reported by the Rota Team as part of the audit results monthly to Quality Group.

### Audit Results

The reporting of SPN audits will be sent to the Governance Team and presented to the Quality Group for monitoring.

## SPN Process Flow Chart



## Glossary

Rota Team	This is part of SevernSide operational functionality. This Team work Weekday hours.
SPN Group	This Group is newly created clinical group with sole function to review Special Patient Notes weekly
HIU Group	The High Intensity User Group manage the cohort of users that use the service regularly within SevernSide and is a multidisciplinary group from Practice Plus Group, Out of Hours, Governance and Integrated Access Partnership. The Group have there own Terms of Reference and Standard Operating Procedure.
Governance Team	The Governance team work ensure standards of clinical governance and patient safety for BrisDoc Healthcare Services
SAS	This is a service within the Health Authority of BNSSG – Bristol, North Somerset and South Gloucestershire for Special Allocation Patients that are unsuitable for treatment within primary care usually due to behaviours of patients.

## Share My Care Instructions

ShareMyCare is a Special Patient Note & Care Plan Register designed to simplify the sharing of care information to our Clinical colleagues. The register supports the automated and manual entry of Respect Forms, and special instructions from our Clinical teams who manage High Intensity Users & patients within the Special Allocation Scheme within our service.

### Logging in to ShareMyCare

#### Setting up your Account

When your organisation administrator has created your account, you will receive an email advising you of your username and password. When logging in for the first time, you will be prompted to set a new password.

**Important Note:** If you are logging in for the first time, ensure that you use the password that was provided to you in the setup email. This password will expire after 24 hours of sending. If this timeframe has elapsed, please liaise with your organisation administrator.

#### Login

The ShareMyCare login can be found on the BrisDoc Weblinks page under;

#### Useful Operational Weblinks; ShareMyCare

Click this link, you will then be presented with login fields where you will be prompted to enter your username and password.

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On the next page, your Role and Organisation will automatically populate, select **Continue**.

Please choose your role and organisation from the selection below.

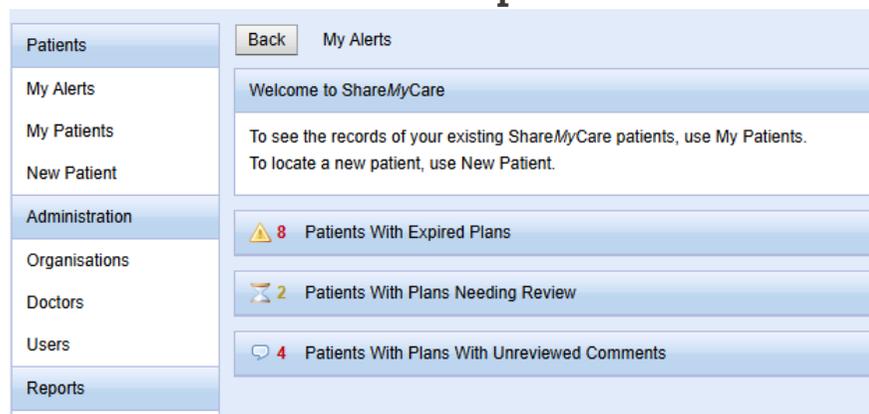
Role\*

Organisation\*

### Home Page & Navigation

Once you have logged in to ShareMyCare you will reach your homepage, here you will see Alerts for plans that have expired, plans needing review & plans with unreviewed comments;

## Special Patient Notes – Version 1.6



If you select any of these items, I will list the patient records needing attention. If you wish to select one of these records, click **Select** next to their name.

### Patient Records

#### Searching for a Patient

To begin a search for a patient record within ShareMyCare, select **New Patient** from within the Patients section of the navigation menu.



From here, you will be able to search for a patient record. You should always search for the patient via their NHS number if you have it, this is to reduce duplicate records in ShareMyCare.

Alternatively, you can search by the patients' demographics. The patients Surname, Date of Birth and Gender must be entered as a minimum.

## Special Patient Notes – Version 1.6

**Search All Patients**

NHS Number\*  

---

Surname\*

Forename

Postcode

Date of Birth\*

Age

Years

Gender\*

When the search is complete, any patients that fit the search criteria you have entered will display next to the search panel.

	Surname	Forename	D.O.B	NHS Number	Organisation
Select	TEST 1	Schr	11-Dec-2000	1111111111	Brisdoc

If you wish to proceed and view the patient record, click the **Select** button on the patient record.

### Creating a Patient Record

If you have performed a search for a patient and they do not exist within ShareMyCare, you can proceed to create a record for them.

Once the search has completed and you have been unable to find the patient record you are searching for, you can begin the process of creating a new record with the **New Patient** button.

## Special Patient Notes – Version 1.6

**New Patient**

**i** If you cannot locate a patient, please create a new patient record.

[New Patient](#)

When taken to the new patient form, you can then provide all the information you have available for the patient. **Important Note:** You must ensure that you complete all the mandatory fields within the form. These fields can be identified by the red field label and asterisk.

**Edit Patient Details**

<p><b>Surname*</b> <input type="text" value="TEST"/></p> <p><b>Forename*</b> <input type="text"/></p> <p><b>Preferred Name</b> <input type="text"/></p> <p><b>NHS Number*</b> <input type="text"/></p> <p><b>Postcode*</b> <input type="text"/> <a href="#">Find</a></p> <p><b>Building</b> <input type="text"/></p> <p><b>Street*</b> <input type="text"/></p> <p><b>Town</b> <input type="text"/></p> <p><b>County</b> <input type="text"/></p>	<p><b>Telephone</b> <input type="text"/> <b>Ext.</b> <input type="text"/></p> <p><b>Mobile</b> <input type="text"/></p> <p><b>Date of Birth*</b> <input type="text" value="01-Jan-1940"/></p> <p><b>Gender*</b> <input type="text" value="Female"/></p> <p><b>Ethnicity</b> <input type="text" value="Not Specified"/></p> <p><b>Interpreter Required</b> <input type="checkbox"/></p> <p><b>Preferred Language</b> <input type="text" value="Not Specified"/></p> <p><b>Functional Status</b> <input type="text"/></p> <p><b>Disabilities</b> <input type="text"/></p>	<p><b>Reg. Surgery*</b> <input type="text" value="Brisdoc"/></p> <p><b>Reg. Doctor</b> <input type="text"/> <a href="#">Find</a></p> <p><b>Telehealth Device Id</b> <input type="text"/></p>	
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[Save](#) [Cancel](#) \* Denotes required fields

Once you have added all the necessary information for the patient record, select **Save**. Alternatively, if you wish to close without saving, you can select the **Cancel** button.

### Editing a Patient Record

If you wish to amend a patient record after it has been created, you can select the **Edit** button on their profile.

## Special Patient Notes – Version 1.6

Patient Details	
Name	TEST 1, Schr
Preferred Name	
Born	11-Dec-2000 (24 Years)
Gender	Female
Detail	
Current Address	THE LONG BARROW, ORBITAL PARK ASHFORD TN24 0GP
Telehealth Id	
Functional Status	
Disabilities	

Edit

You will then be permitted to amend any of the details within the patient record that you require.

Once you have amended all the necessary information, select **Save**. Alternatively, if you wish to close without saving, you can select the **Cancel** button.

### Archiving a Patient (Obsolete)

To archive a patient, you must search for and open the patient record and then select the **Archive Patient** button.

Archive Patient

You will then be presented with a form where you will need to tick **Patient Deceased?** and enter the **Date of death**. Once these fields have been completed, the **Archive Patient** button will allow you to proceed.

## Special Patient Notes – Version 1.6

**Archive Patient**

This will archive the current patient, which indicates that you no longer need to work with the patient on a regular basis.

Patient Deceased?

Date of Death

Diagnosis

Actual Place of Death

By default, archived patients will no longer appear in your Index view.

### Un-Archiving a Patient

If a patient has been archived incorrectly, you can select the **Un-Archive** button, which will appear in the place of the original **Archive** button.

### Plan Management

#### Plan Types

Within ShareMyCare we will have multiple plan types to select and add to the patient record.

**Add Plan**

**Add Plan**  
Please choose the type of plan required from the selection below:

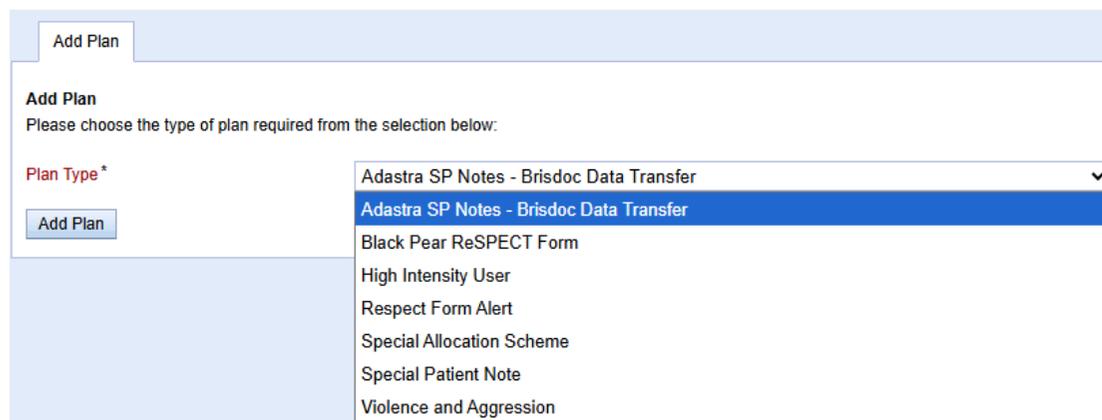
Plan Type\*

- Aadastra SP Notes - Brisdoc Data Transfer
- Aadastra SP Notes - Brisdoc Data Transfer**
- Black Pear ReSPECT Form
- High Intensity User
- Respect Form Alert
- Special Allocation Scheme
- Special Patient Note
- Violence and Aggression

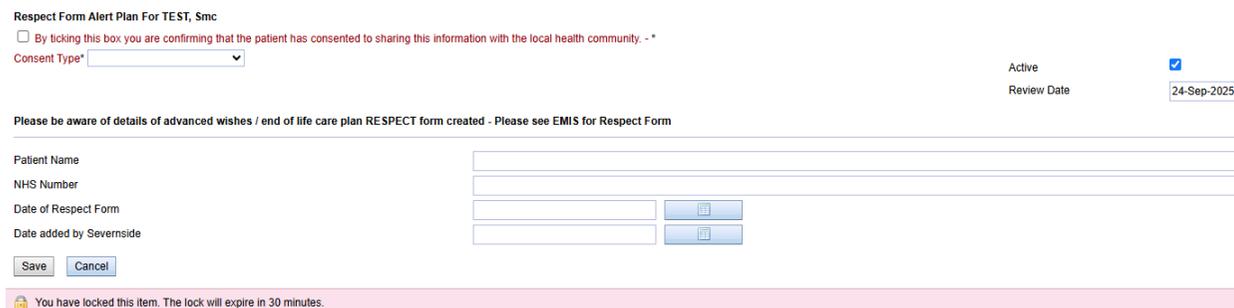
## Special Patient Notes – Version 1.6

### Adding a Plan to a Patient Record

Within the patient record, navigate to the bottom half of the record and view the **Add Plan** tab. Select the plan you need to add from the dropdown menu and then select **Add Plan**.



You will then be presented with the plan that you selected above. You can now enter all the information necessary within the fields provided. Good practice would be to specify the SPN plan. All migrated plans from Adastra would be 'Adastra SP Notes' – re-enter this with a specific plan from the menu. Below is an example of how a plan may appear:



Tick to confirm consent and select the Consent Type from within the dropdown menu – This will be **Best Interest of Patient**.

## Special Patient Notes – Version 1.6

### Respect Form Alert Plan For TEST, Smc

By ticking this box you are confirming that the patient has consented to sharing this information with the local health community. - \*

Consent Type\*

- Explicit Consent
- Best Interest of Patient
- Lasting Power of Attorney
- Withdrawn

Please be aware that this is a / end of life care plan RESPECT form created - Please see EMIS for Respect Form

Patient Name

NHS Number

Date of Respect Form

Date added by Severnside

<input type="text"/>	<input type="button" value="Calendar"/>
<input type="text"/>	<input type="button" value="Calendar"/>

The plan should automatically be set to **Active**. If it hasn't, please tick the box to activate it. Then, add the plan's Review Date.

Active



Review Date

### Edit a Plan

Any plan that has been recorded against a patient record can be updated where required. Within the patient record, navigate to the bottom half of the record and select the tab of the plan you would like to edit. Select the **Edit** button.

## Special Patient Notes – Version 1.6

Add Plan	Adastra SP Notes - Brisdoc Data Transfer	Add new plan type Test ⚠️	Attachment Test	Black Pear ReSPECT Form
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Respect Form Alert Plan For TEST, Smc

Please be aware of details of advanced wishes / end of life care plan RESPECT form created - Please see EMIS for Respect Form

Patient Name	Smc TEST
NHS Number	1111111111
Date of Respect Form	25/06/2025
Date added by Severnside	26/06/2025

Edit

Here you will be able to change the required information. These amendments are Audited.

### Make a Plan Inactive

If a patient's plan has expired or is no longer applicable, the plan can be marked as inactive. Within the patient record, navigate to the bottom half of the record, and select the tab of the plan you would like to mark as inactive. Select the **Edit** button, untick the **Active** field and **Save**.

Active

### Plan Audits

The creation of, or edits made to any plan within Sharecare are fully audited. To review the change history of a plan, you must firstly search for and open a patient record.

Within the patient record, you must select the tab of the plan that you would like to view the history of. Please see an example below.

Add Plan	Black Pear ReSPECT Form
----------	-------------------------

## Special Patient Notes – Version 1.6

If you wish to view the history of the plan including when it was created and any updates that have been made to it, click the **Plan History** button. This will bring up the Version History, where each field can be expanded to view further detail.

Version History	
Date Order:	<input type="checkbox"/>
Field	
Version 2 - 26/06/25 14:50 by Chelsea STEVENS	
Version 1 - 26/06/25 14:35 by Chelsea STEVENS	
Version 0 - 26/06/25 14:34 by Chelsea STEVENS	

If you wish to view any changes to any specific fields within the plan including when they were updated and the user who made these updates, click the **Field History** button. This will bring up the Version History, where each row can be expanded to view further detail. Here you will be able to see the plan content on particular dates changes were made.

Row	Value	Data	Plan	PlanFieldDefinition	Version	Modified	ModifiedUser
Date added by Severnside							
0	25/06/2025 00:00:00			Date added by Severnside	2	26/06/2025 14:50:25	Chelsea STEVENS
0	26/06/2025 00:00:00			Date added by Severnside	1	26/06/2025 14:35:28	Chelsea STEVENS

### Adding notes to a plan

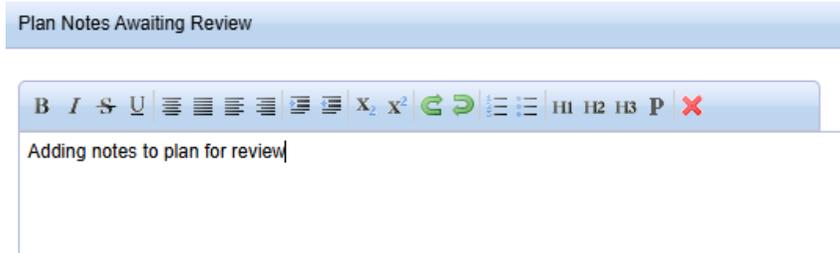
To add a note, you must firstly search for and open a patient record.

Within the patient record, select the tab of the plan that you would like to add a note for.

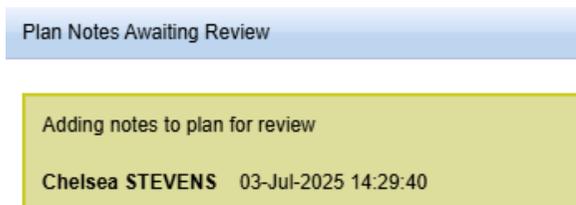


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Once the plan is opened, at the very bottom of the page will be a **Plan Notes Awaiting Review** panel where you can add your notes to the plan. Once you have added all the detail you would like to include, select the **Add Comment** button.



Once you have saved your note, this will appear within the **Plan Notes Awaiting Review** panel.



This will also show under the My Alerts section, within the **Patients with Plans with Unreviewed Comments** heading.

Once these comments have been Approved or Rejected, this information will be shown underneath the **Reviewed Plan Notes** panel at the bottom of the page. The Notes on the left will detail the user & the note they have added. The notes on the right will detail the User who approved or rejected the comments.

Approved comments will appear in **Bold**. Rejected comments will show with a ~~strikethrough~~ and be faded out.

Reviewed Plan Notes

Hide ▲

Adding note for approval.

**Aimee HENLEY 04-Jul-2025 19:13:28**

Approved by Chelsea STEVENS 04-Jul-2025 19:13:56

Adding comment for review

**Aimee HENLEY 04-Jul-2025 19:07:11**

Rejected by Chelsea STEVENS 04-Jul-2025 19:12:16

### Logout

Once you have finished using ShareMyCare, navigate to the top right-hand corner of the page and select the **Logout** button.

Logout

## Version Control

Version:	Owner:	Comment:
DRAFT	Louise Whyte and Renuka Suriyaarachchi	Document creation
1.0	Louise Whyte and Renuka Suriyaarachchi	Document published
1.1	Louise Whyte	Reference Violence prevention and reduction policy and added SAS removal to table.
1.2	Louise Whyte/Lucy Grinnell	SPNs copied into Aadastra for NHS111 visibility. Updated to include Share My Care and the plan templates and instructions
1.3	Louise Whyte/Lucy Grinnell	Templates for SAS patients and violence and aggression plans added
1.4	Lucy Grinnell	Removal of and references to the templates for SAS patients and violence and aggression plans replaced by directing to the Violence, Aggression, and Discrimination Prevention and Reduction Policy

### Special Patient Notes – Version 1.6

1.5	Renuka Suriyaarachchi	Clarity of changing plan in ShareMyCare when editing a AdastraSPN
1.6	Louise Whyte	20/2/26 review minor edits