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The BrisDoc Burren Transfer of Care Hub (BToCH) Daily Handover and Input Tracker Guidance SOP

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What is the Daily BToCH Handover and Input Tracker?

This is an excel spreadsheet that performs two main functions;

1. Provides continuity across days between Clinical Practitioners at The BToCH.
2. Enables us to log and record the input we are providing to the service

The spreadsheet is saved on the S drive in the following location: **S:/BTOCH/Handover**

General principles of the spreadsheet

- The spreadsheet is not intended to replace the clinical medical notes; it is for the above purposes only.
- The NHS number will be used as the patient identifier.
- **Do not paste into cells as this can bypass checks**.
- There are three colour coded headings:
- Grey headed sections do not need to be amended at any point; these sections auto-populate from other parts of the sheet.
- Purple headed sections must be completed when any BToCH patient arrives or leaves the Burren. Please complete this as part of your admission clerking and ensure it is also completed when a patient leaves.
- Blue headed sections must be completed
- Pick from drop down lists rather than typing in non-free text cells, so that data always matches correctly.
- You can use the arrows in the header row to filter. This does not change anyone else's data.

Please review and update the spreadsheet daily. We anticipate that as a minimum this will be at the start and end of your shift, but you may prefer to update as you go through the day to ensure all inputs are tracked.

When ending your day, **please ensure you save and close the spreadsheet** to ensure your colleague the next day can open it.

Sections of the Spreadsheet

The initial 'sheet info' of the excel spreadsheet provides an overview of the 4 separate pages of the spreadsheet, which are expanded on below:

1. Handover

This section is intended to be a location to share salient and important clinical tasks for colleagues on the next shift. For example, if you have taken bloods from a patient, you would add a task to the handover for your colleague to review the results of these bloods the subsequent day. Another example might be to finalise the discharge summary for a patient leaving the Burren.

There may also be occasions where you identify a task that is *needed at a future point*; this can also be added to the handover section when it is identified. An example might be an action from the hospital discharge summary that bloods for renal function must be repeated in two weeks' time. In this scenario, you might add this to the handover with the relevant future date that the bloods need to be taken.

Please ensure that each action has **its own independent line**. i.e. if one patient needs two actions to be handed over, they *each* require their *own* entry.

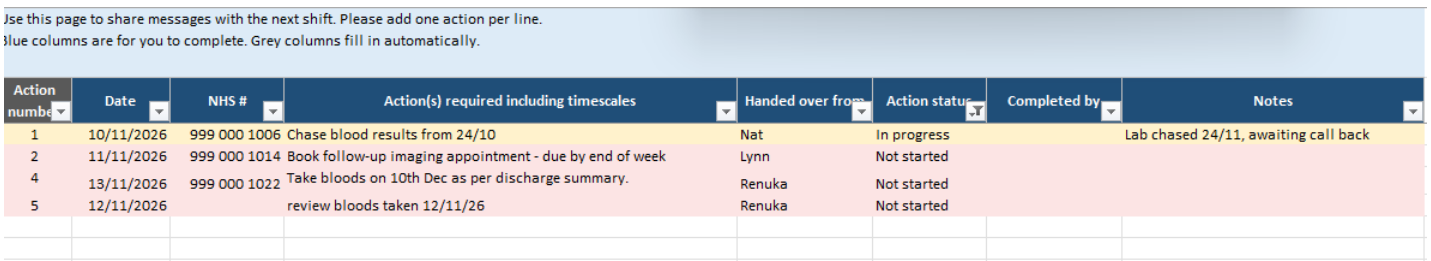
Please complete all relevant sections of this form. There are drop down options to make this easier, and a free text slot for the action itself. Please ensure this free text is kept succinct and focused on the action or task required. If further expansion is required, you may wish to signal where the clinical note entry on EMIS relating to this action is located e.g. '*check bloods requested on 12.12.26 and enact as per plan signalled in EMIS on that date'.*

When entering an action, please also indicate the status of this action as follows:

- **Not started** - no action taken at all for this task thus far (e.g. the example where bloods are needed in 2 weeks' time). These will appear red.
- **In progress** - some action taken towards this task (e.g. prepare discharge summary for departure in 3 days' time). These will appear yellow.

If you are reviewing actions at the end of your day, please ensure you update the status accordingly. If the task is fully completed, please mark its status as '**completed'.** Once completed, the task will appear greyed out.

You have the options of filtering actions based on their progress using the action status row if wished.


Use this page to share messages with the next shift. Please add one action per line.
Blue columns are for you to complete. Grey columns fill in automatically.

Action numbe	Date	NHS #	Action(s) required including timescales	Handed over fro	Action statu	Completed by	Notes
1	10/11/2026	999 000 1006	Chase blood results from 24/10	Nat	In progress		Lab chased 24/11, awaiting call back
2	11/11/2026	999 000 1014	Book follow-up imaging appointment - due by end of week	Lynn	Not started		
4	13/11/2026	999 000 1022	Take bloods on 10th Dec as per discharge summary.	Renuka	Not started		
5	12/11/2026		review bloods taken 12/11/26	Renuka	Not started		

2. Patient overview

This section provides an overview of the patient during their stay. You will need to complete the

- **NHS number and admission date when a patient arrives at The BToCH**. Note that NHS numbers that have *not* been entered in this section will appear red in any other part of the spreadsheet. This

helps you identify if you have incorrectly entered NHS number that is not corresponding to a current BToCH patient.
- **Departure date** (when they leave)

The grey-headed sections auto-populate from other sections/ entries. They will enable you to identify when a patient was last seen. To support our wish to ensure that all patients receive a 'Regular Routine Review' at least once every 14 days, this section of the chart provides a visual clue when this date is approaching (turning red on this section when this is due within 2 days).

3. Contacts

The 'contacts section' is our mechanism to log and record our input to the service for each patient.

To support this, we ask that you record every clinical contact regarding a patient. As with the handover section, we ask that each individual contact has its own individual line for things that are related to that individual contact.

As an example, if you assessed a patient following a report of a fever by a Burren nurse overnight, you would log this as a clinical contact. If you took bloods as part of this clinical assessment, we would expect this to be encapsulated within that line. To support recording of this, we have created drop down menus for each row and we ask that these are also completed. They include, for example, whether or not samples were taken, or advice was sought.

If, the following day, you were asked to chase bloods from that preceding day's events, we would expect that to be logged as separate clinical contact given that it is materially distinct in time and space.

Examples of individual clinical contacts might include

- All Admission Reviews
- Completion of a discharge summary paperwork and prescriptions
- Clinical assessment of a patient at the request of a MDT colleague
- Ward round review
- Discussion about the patient in the GP MS team's slot.

All the examples above should be coded a clinical contact on the drop-down menu.

- Any Regular Routine Review – should be coded as a RRR on the drop-down menu.

4. Lookups List

This section determines the options for the drop downs and will not be used in daily practice. However, if you need to add additional drop-down options these can be added to columns F-H. E.g. if you wish to add a new staff name it can be added directly beneath the last one, with no gaps, and they'll appear in the dropdowns

The other lists are locked because calculations depend on them.

Trouble shooting

You may encounter a scenario where the spreadsheet cannot be opened as an editable copy. It may only be opened as a read only copy usually because a previous copy has not been closed down properly. Please open the spreadsheet as a read only copy. Use the **Save as** facility and save the spreadsheet as *Daily BToCH Handover and Input Tracker* and todays date in this circumstance. You can then add your documentation for the day and save the new document.

The older read only version can be moved to the archive folder within the S drive.

Change Register

Date	Version	Author	Change
20/11/2026	V.10	Rebecca Cooke (Deputy Medical Director) and Renuka Suriyaraachchi (Head of Nursing)	