

INFOFLEX WEB V6

QUICK REFERENCE GUIDE – Colorectal Stratified Follow-Up (SFU)

Note: A patient must have a recorded diagnosis of Colorectal Cancer before they can be placed on a Colorectal Stratified Follow-up pathway. They must also have been placed on a Stratified Pathway through an MDT meeting (Outcomes and Actions section).

Section 1: Searching for the patient

There are two main ways to search for a patient that has been placed on a Colorectal SFU pathway. The first is to search for the patient's individual record and the second is using the Tracking list function to find the patient.

Method 1 – Searching for an individual patient record:

- 1) Log into Infoflex Web.
- 2) In the search screen enter the patient's NHS number or search by name (use wildcards %* to increase search results).
- 3) Click on the row of the returned result for the correct patient in order to select that patient's record.
- 4) The following screen will appear, click on the option for Stratified Follow-Up.

Cancer Information System Profile Tasks 0 Log out

Patient Search Tracking MDT Recovery Packages Clinical Guidelines Datasets **Patient Record**

NHS Number	Person Family Name	Person Given Name	Person Birth Date	Record ID
098 765 4321	Testing	Testing	01/12/1957	0000530922

< Patient Search Contact Details

Please select from one of the available options.

Administration:

View Cancer Pathways

CNS/HCP Referral / Patient Contact

The Recovery Package:

Holistic Needs Assessments

Stratified Follow-up

- 5) The next screen prompts the user to choose the appropriate pathway, clicking the relevant line will open the Colorectal SFU Module.

Method 2 – Searching for patients via Tracking Lists

- a. Log into Infoflex Web.
- b. From the Recovery Packages Menu select Stratified Follow-Up > Colorectal.
- c. On the next screen there are two drop down menu options, select the appropriate options.
- d. A list of patients will appear and the relevant patient can be select by clicking on the row. This opens the Colorectal SFU module.

The screen is designed to present the most useful information at a glance with quick reference links to view screens with information on Diagnosis, Treatments, Pathology. Clicking on these links will open up a screen with relevant information. When wishing to return to the Stratified Followup screen click the link.

Patient Search						Tracking ▼		MDT ▼		CNS ▼		Recovery Packages ▼		Guidelines ▼		Datasets ▼		
<h3>Colorectal Stratified Follow-up</h3>																		
NHS Number 098 765 4321				Person Family Name Testing				Person Given Name Testing				Person Birth Date 01/12/1957				Record ID 0000530922		
◀ Patient Record						Colorectal ▼		Contact Details				Stratified Followup		Diagnosis		Treatments	Pathology	Patient History
Referral Date 09/10/2019				Diagnosis Date 15/09/2020		Type New Primary Diagnosis			Non Primary Type			Active Specialty Lower Gastrointestinal			Diagnosis Colon, unspecified			
F-up Start Date 08/01/2021		Month(s) on Pathway 9		Last Review 18/04/2024	Next Review 08/07/2024	CEA 08/07/2024	CT TAP 08/07/2024	Colon 08/07/2024	Flex Sig 08/07/2024	MRI 08/07/2024	Liver MRI 08/07/2024	PET 08/07/2024						

Tab 1 Stratified Follow-up details

The first time this section is accessed it will appear almost blank. If reviewing a previously completed record you will see the already populated fields. It presents the top-level information and should not need to be routinely changed unless the patient is discharged or taken out of the pathway.

Patient Record		Colorful		Stratified Followup		Diagnosis		Treatments		Pathology		Patient History	
Referral Date		Diagnosis Date		Type		Non Primary Type		Active Specialty		Diagnosis			
09/01/2020		24/06/2020		New Primary Diagnosis				Lower Gastrointestinal		Ascending colon			
Diagnosis Date	Month(s) on Pathway	Last Review	Next Review	CEA	CT TAP	Colon	Flex Sig	MRI	Liver MRI	PET			
24/06/2020	4												
Save changes													

Stratified Follow-up Details

Current Review

Stratified Follow-up Summary

Is Patient Eligible for Stratified Follow-up?*

Date of 1st Curative Surgery

Follow Up Start Date*

Follow-up Group

Follow-up Led by

Follow-up Status (Update)

Org. F-Up Carried out at*

Managing Surgeon

Managing Oncologist

Keyworker (KW)

Hospital (KW)

Patient Email address

Invited to Work-shop?

Tracker comments

All follow-up details

Reviews	Status History	CEA	CT TAP	Colonoscopy	Flexi Sigmoid	MRI Rectum	Liver MRI	PET Scan	Documents	F-Up Group		
Date	Review Outcome	CEA	CEA Outcome	Colon	Colon Outcome	CT	CT Outcome	Flexi Sig	Flexi Sig Outcome	MRI	MRI Outcome	Liv
No Results Found												

Is Patient Eligible for Stratified Follow-up?*: This is a tick box, clicking in the box applies the tick. This must be ticked to enable further fields within the form.

Date of 1st Curative Surgery: Date field. Date can be typed in DD/MM/YYYY or use calendar. This field will be auto-populated based on the recorded treatment (unless treatment was prior to SFU module implementation within Infoflex).

Follow up Start Date: Date field. Auto-populated with the date patient was placed on SFU pathway via MDT meeting. Date can be changed.

Follow-up Group: Dropdown list from which appropriate option can be selected.

Follow-up Led by: Dropdown list from which appropriate option can be selected.

Follow-up Status (Update): Once the Follow-up Led by field has been completed this field will be updated with the status Active.

Org. F-up Carried out at*: enter site code or use dictionary to lookup

Managing Surgeon: start typing name /use dictionary to lookup

Managing Oncologist: start typing name /use dictionary to lookup

Keyworker: start typing name /use dictionary to lookup

Hospital (KW): Will auto fill based on dictionary entry

Patient Email address: Free text field to enter email address

Invited to workshop: Click into box once to apply tick, twice to place a cross and three times to clear. (*If ticked the next two fields will appear)

***Date Invited**: Date field. Today's date can be entered by pressing 't' key. Date can be typed in DD/MM/YYYY or use calendar.

***Attended Work-shop**: Click into box once to apply tick, twice to place a cross and three times to clear.

Date Attended Work-shop: Date field. Today's date can be entered by pressing 't' key. Date can be typed in DD/MM/YYYY or use calendar. (Appears if date entered in date attended workshop field)

Tracker comments: Free text field to type any comments you feel maybe relevant.

Tab 2: Current Follow-up

The first time this screen is accessed it will appear blank as this would normally be the review at which the tests are scheduled. From the second review dates will be populated in the Last Test scheduled column.

Stratified Follow-up Details		Current Review		Review on Pathway	
Date of Review*	Person Reviewing	Hospital Name	Review on Pathway	On Pathway	Not required
CEA	02/06/2021	MEDAW - Amy W	MEDWAY MARITIME		
CT TAP	08/07/2024				
Colonoscopy	08/07/2024				
Flexi Sigmoid	08/07/2024				
MRI rectum	08/07/2024				
Liver MRI	08/07/2024				
PET Scan	08/07/2024				

Enter a [Date of Review] to begin.

Next Test Date: Review Status*:

* Fields must be entered before the Review can be marked as complete.

Date of review: Use 't' to default in today's date or alternatively the calendar and clock icons can be used.

Person Reviewing: will auto fill from Tab 1. If need to change, delete out the current name and start typing the new one or use dictionary icon to lookup.

Hospital Name: Auto fills based on the dictionary entry for the Person Reviewing.

Review on Pathway: Shows the number of months on the SFU pathway that this review is occurring. (Calculated item)

The next few rows relate to the individual tests that can be/have been ordered.
For the first review, tests would need to be scheduled.
(Please note, that this does send/order these investigations)

To record the scheduling of tests:

- In line of required test, click into Modify Schedule box and a tick will appear.
- In the next column Schedule Next Test (from F-up Start Date) use the arrows to enter the number of months (from the SFU F-up Start Date) that the test needs to be carried out.
- In the next column a date will appear.

To record results of previous test:

The Last test Scheduled column will contain the date that the test was carried out. The **'Outcome of Last Test'** field is a code list from which 'Normal' or 'Abnormal' can be selected. Once either option has been selected a comments field will appear to document specific information as required.

Stratified Follow-up Details		Current Review	
Date of Review*	02/06/2021 00:00	Person Reviewing	MEDAW - Amy W
Hospital Name		MEDWAY MARITIME	
Review on Pathway		5 months	
	Last Test Scheduled	Outcome of Last Test	Modify Schedule (from F-up Start Date)
CEA	08/07/2024	Normal	
		testing	
CT TAP	08/07/2024	Abnormal	
		test	
Colonoscopy	08/07/2024	Normal	
		
Flexi Sigmoid	08/07/2024	Abnormal	
		IIIIII	
MRI rectum	08/07/2024	Normal	42 months
		1111111	
Liver MRI	08/07/2024	Abnormal	
		22222	
PET Scan	08/07/2024	Normal	
		333333	
Review Outcome*		Next Test Date	
Letter to generate		08/07/2024	
		Review Status* Started	

* Fields must be entered before the Review can be marked as complete.

Review Outcome: Drop-down list with a selection to choose from. The first time you are scheduling you will need to select 'Schedule Tests'

Next Review Date: Will default to the earliest next scheduled test date.

Review Status: Must be changed to complete before saving data.

Letter to Generate: This is a code list from which a letter template can be selected. If the **'Ad Hoc letter'** is selected a free text box will appear. Any text entered will appear within the body of the letter.

*Discharge/ Off Pathway

To change the follow-up status:
Stratified Follow-up Details tab

Follow-up Status Update?: Click into the box to place a tick. The box to the right of this that currently displays active will enable a dropdown list of options to select from.
Two more fields will then appear.

Discharge Date: enter date or use calendar.

Reason for Discharge: Free text field.

Refer back to Cancer Team

- **Refer back to cancer team?:** A tick will appear if this option has been selected in the Follow-up Status.
- **Reason for Referral (Re-entry):** dropdown .
- **Date Decision made of Referral (Re-entry):** The date on which it was decided to refer back the patient to the cancer team.
- **Urgency of Referral:** It indicates the urgency of the current refer back.
- **Information Provided to:** It specifies to whom the information of refer back has to be provided like GP, Patient, Cancer Care Team etc.
- **Letter(s) (Re-entry)** – It provides an option to generate either Patient Letter or a GP Letter. (Additional letters can be added)
- **Comments (Re-entry)** – Freetext field.

All Follow-up details

At the bottom of the SFU screen is another section containing useful at a glance information:

At the bottom of the SRS screen is another section containing user-at-a-glance information:

Reviews	Status History	CEA	CT TAP	Colonoscopy	Flexi Sigmoid	MRI Rectum	Liver MRI	PET Scan	Documents	
Date	Review Outcome	CEA	CEA Outcome	Colon	Colon Outcome	CT	CT Outcome	Flexi Sig	Flexi Sig Outcome	MRI
01/01/2019	Satisfactory review	01/07/2018		01/04/2018		01/12/2017		01/12/2017		01/12/2017
27/12/2018	Satisfactory review	01/07/2018		01/04/2018		01/12/2017		01/12/2017		01/12/2017
01/10/2018	Test Abnormal: Monitor	01/07/2018		01/12/2017		01/12/2017		01/12/2017		01/12/2017
01/03/2018	Test Abnormal: Further tests	01/12/2017		01/12/2017		01/12/2017		01/12/2017		01/12/2017
25/11/2017	Schedule Tests									

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5 rows per page

Showing

- **Reviews:** A summary of all the previous reviews appears at the bottom of the screen, with dates and results.
- **Status History:** This will show details of pathway status for example if the patient has been taken off-pathway and then made Active again.
- **CEA:** Interface based summary view. Coming soon.
- **CT TAP:** Interface based summary view. Coming soon.

- **Colonoscopy:** Interface based summary view. Coming soon.
- **Flexi Sigmoid:** Interface based summary view. Coming soon.
- **MRI Rectum:** Interface based summary view. Coming soon.
- **Liver MRI:** Interface based summary view. Coming soon.
- **PET Scan:** Interface based summary view. Coming soon.
- **Documents:** All the letters that have been generated from the reviews can be found here, clicking on a row will open the document in PDF format in another tab in the Web Browser.

Letters available for selection:

Starting SSM – A confirmation letter to the patient copying in GP informing them, the patient has agreed to SSM programme and explaining what it involves

Introduction to SSM – A confirmation letter to the patient explaining what will happen next in their Remote SSM pathway and the steps involved

CEA Missed – A letter to the patient highlighting missed CEA blood test and prompting them to arrange within two weeks

CEA Due – A letter to the patient highlighting a CEA blood test is required and prompting them to arrange as soon as possible

Overdue Test Reminder – A letter to the patient informing them that the selected test is over due and to contact the nursing team

SSM review – Recall to Clinic – A letter to the patient asking them to attend an outpatient/telephone clinic to discuss recent results

Colonoscopy CT/CEA Normal – A letter to the patient stating recent results were normal and if any concerns/new symptoms to call the nursing team

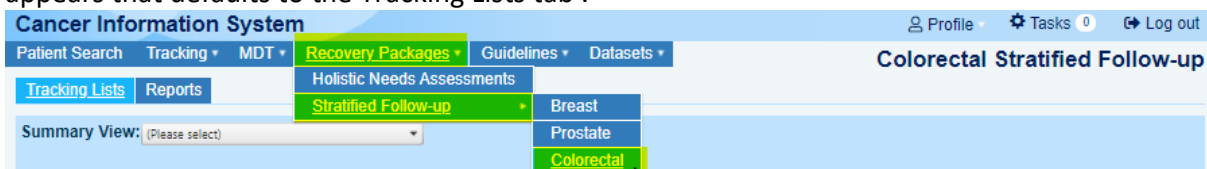
5 Year Discharge – No Colonoscopy – A letter to the patient discharging them back to the care of their GP after normal results for five years

5 Year Discharge – Continued Surveillance – A letter to the patient discharging them back to the care of their GP after normal results for five years but with routine surveillance Colonoscopies

Ad Hoc Patient Letter – When selected a free text box will appear and any text entered will populate in the letter

Section 3: Tracking Lists and Reports

These can be accessed via the Recovery Packages link that appears at the top of the screen. The dropdown menu gives the option for Stratified Follow-up > Colorectal, once selected a screen appears that defaults to the Tracking Lists tab .



Tracking Lists

The Summary View dropdown contains several options, when an option is selected, a query can then also be selected to display the required list of patients.

(Please select)

Colonoscopy Completion Overdue

Index Surgery

Pathways not on Stratified F-up Tracking

Review - Due

Status

Status - Active Nurse

Status - Active SSIM

Status Active Consultant

Tests - Done (CEA)

Reviews – Due | Queries:

2_CO - All - Review Over Due

1_CO - All - Review Over Due SFU Org

1_CO - All - Tests Due in Next Month SFU Org

1_CO - All - Tests Due in Parameter - CEA SFU Org

1_CO - All - Tests Due in Parameter - Colon SFU Org

1_CO - All - Tests Due in Parameter - CT SFU Org

1_CO - All - Tests Due in Parameter - Flexi Sig SFU Org

1_CO - All - Tests Due in Parameter - MRI SFU Org

2_CO - All - Review Over Due

2_CO - All - Tests Due in Next Month

2_CO - All - Tests Due in Parameter - CEA

2_CO - All - Tests Due in Parameter - Colon

2_CO - All - Tests Due in Parameter - CT

2_CO - All - Tests Due in Parameter - Flexi Sig

2_CO - All - Tests Due in Parameter - MRI

Status | Queries

2_CO - SFU Not Initiated

1_CO - Active Consultant SFU Org
1_CO - Active Nurse SFU Org
1_CO - Active SSM SFU Org
1_CO - All Status SFU Org
1_CO - Deceased SFU Org
1_CO - Discharged SFU Org
1_CO - Off Pathway SFU Org
1_CO - Re Entry Off Pathway SFU Org
1_CO - Refer Back to Cancer Team SFU Org
1_CO - Suspended SFU Org
1_Colorectal Tracking (All) SFU Org
2_CO - Active Consultant
2_CO - Active Nurse
2_CO - Active SSM
2_CO - All Status
2_CO - Deceased
2_CO - Discharged
2_CO - Off Pathway
2_CO - Re Entry Off Pathway
2_CO - Refer Back to Cancer Team
2_CO - SFU Not Initiated
2_CO - Suspended
2_Colorectal Tracking (All)

Reports

The Standard reports available show numbers of patients in specific follow up categories:

Report A – All Status Report

- Runs on today's date by default.
- Displays data for last month, 3 months and 12 months.
- Shows a summary of the numbers Follow-ups broken down into various categories such as Follow-up Group, Follow-up Led By and Follow-up Status.

Report B – For all Organisations

- User enters Start and End Dates for report to run.
- Shows a summary of the numbers of Follow-ups broken down into various categories and also by Organisation (site).
- Shows number of investigations ordered during requested period.

Report C – Organisation Specific

- User enters Organisation and Start and End Dates for report to run.
- Displays data on various Follow up categories for the specific organisation.
- Displays the number of Investigations ordered within the selected dates.