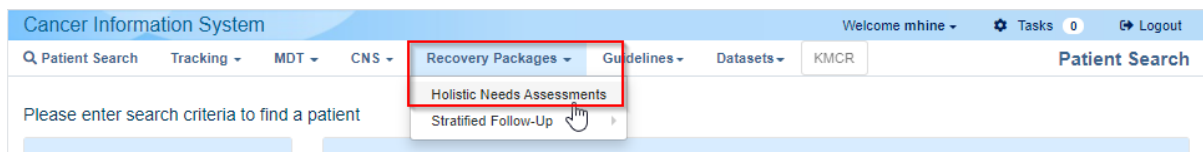


INFOFLEX WEB V6

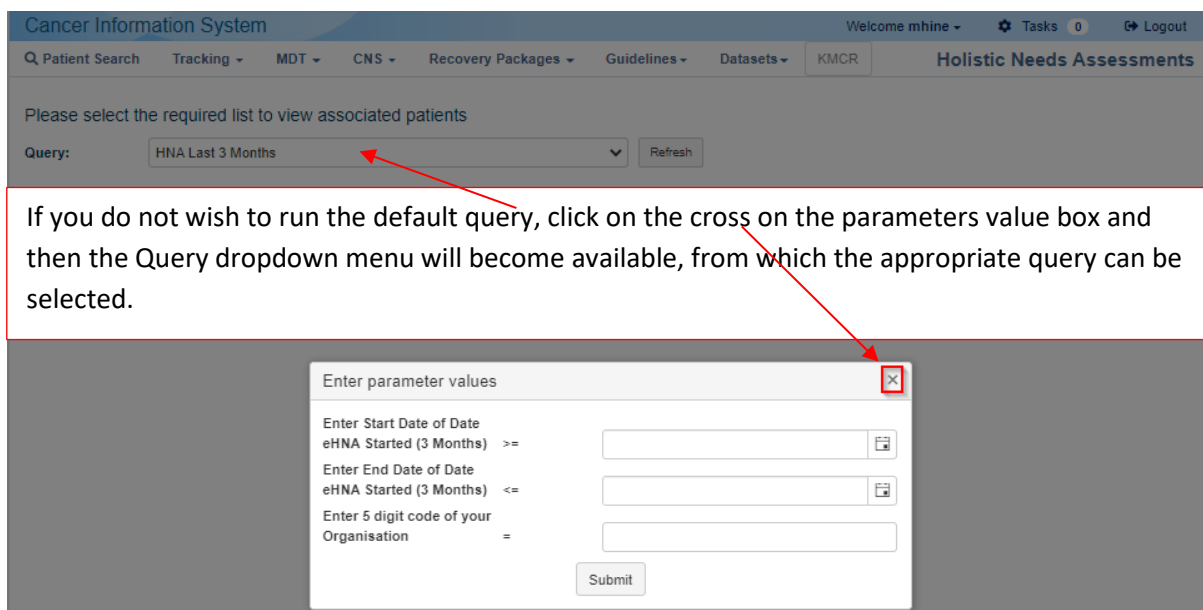
QUICK REFERENCE GUIDE – HNA Tracking Lists

1) Viewing HNA Tracking lists

- Log into Infoflex V6.
- From the top menu click on the '**Recovery Packages**' link then click on '**Holistic Needs Assessments**'.



- A default query is automatically selected of '**HNA Last 3 Months**' with an '**Enter parameter values**' box visible for you to enter the required criteria.



- List of queries (available at the time of QRG production, see Appendix 1 for details of the 'DATA' lists):

Please select the required list to view associated patients

Query: HNA Last 3 Months Refresh

- DATA - 1. HNA Top 3 Concerns (All)
- DATA - 2. HNA Top 3 Concerns (By Tumour Group)
- DATA - 3. HNA Completed - At End of Treatment
- DATA - 4. HNA Care Plan Completed - At End of Treatment
- DATA - 5. HNA Completed - within 31 Days of Diagnosis
- DATA - 6. HNA Initiated - Care Plan Completed within 31 Days of Diagnosis
- DATA - 7. Count of First Definitive Treatment Pathways (All Tumour Sites)
- DATA - 8. Count of First Definitive Treatment Pathways (By Tumour Site)
- Diagnosed - No HNA
- HNA Initiated-Care Plan Complete
- HNA Initiated-Care Plan In Progress
- HNA Initiated-Care Plan Not Required
- HNA Initiated-Care Plan Pending
- HNA Last 3 Months
- HNA Offer Only-Accepted
- HNA Offer Only-Declined
- HNA Patients (All HNA Initiated)
- HNA Patients (All HNA Initiated)-3 Digit Org Code**
- HNA Review Due
- HNA Test Patients
- HNA-Accepted
- HNA-Declined**

- With the required query selected, enter your criteria into the fields within the parameter values box. (If you do not know the 5 digit code for your organisation, please see Appendix 2)

Enter parameter values

Enter Start Date of Date eHNA Started (3 Months) >=

Enter End Date of Date eHNA Started (3 Months) <=

Enter 5 digit code of your Organisation =

OK

- Click OK.
- A list of patients matching the criteria entered will appear on the screen.
- Select a patient record to view their HNA details. (Move the mouse pointer/hand over a row, it will turn light blue, clicking the mouse button selects the record.)

Please select the required list to view associated patients

Query:

Enter Start Date of Date eHNA Started (3 Months) [>=] 01/01/2021

Enter End Date of Date eHNA Started (3 Months) [<=] 21/09/2021

Enter 5 digit code of your Organisation [=] rrvkc

Export to Excel

Drag a column header and drop it here to group by that column

| NHS Number | Hospital Number | Surname | Forename | Referral Request Date | Diagnosis Date | Primary Diagnosis | Date HNA Offered | HCP Offering HNA | Point in Pathway HNA Offered | HNA Form |
|------------|-----------------|---------|----------|-----------------------|---------------------|--------------------------------------|------------------|------------------|------------------------------|------------|
| 123456789 | 12345678 | SMITH | MARISA | 22/08/2021 00:01:00 | 08/09/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 21/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 12/07/2021 09:07:29 | 27/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 21/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | HARRIS | JENNIFER | 30/08/2021 00:01:00 | 31/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 21/09/2021 | Jennifer Harris | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | HARRIS | JENNIFER | 09/07/2021 21:48:00 | 03/09/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 20/09/2021 | Jennifer Harris | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 12/07/2021 09:47:00 | 02/09/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 20/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 18/07/2021 13:22:42 | 02/09/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 20/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 23/08/2021 00:01:00 | 31/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 20/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 23/07/2020 00:00:00 | 21/08/2020 00:00:00 | C81 - Malignant neoplasm of prostate | 20/09/2021 | Marisa Smith | End of treatment | Electronic |
| 123456789 | 12345678 | WILSON | ASHLEY | 10/09/2014 00:00:00 | 15/09/2014 00:00:00 | C50.9 - Breast, unspecified | 20/09/2021 | Ashley Wilson | Start of treatment | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 13/11/2020 00:00:00 | 23/12/2020 00:00:00 | C81 - Malignant neoplasm of prostate | 17/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 25/11/2020 00:00:00 | 12/01/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 17/09/2021 | Marisa Smith | End of treatment | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 30/01/2021 00:00:00 | 05/02/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 17/09/2021 | Marisa Smith | End of treatment | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 17/08/2021 00:01:00 | 27/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 18/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | HARRIS | JENNIFER | 14/07/2021 09:00:00 | 02/09/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 15/09/2021 | Jennifer Harris | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | SMITH | MARISA | 07/07/2021 08:59:00 | 23/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 15/09/2021 | Marisa Smith | Initial cancer diagnosis | Electronic |
| 123456789 | 12345678 | HARRIS | JENNIFER | 17/08/2021 00:01:00 | 18/08/2021 00:00:00 | C81 - Malignant neoplasm of prostate | 15/09/2021 | Jennifer Harris | Initial cancer diagnosis | Electronic |

2) Changing the order of the tracking list

- The tracking list table can be sorted into a different order by clicking on the required column heading, clicking once will place the data in ascending order and clicking a further time will place it in descending order.
- It is also possible to group items by a specific column header, for example to breakdown the list into sections based on the HCP Offering HNA, click and hold on the column header for that item and then drag and drop it over the row above the column headings (when the symbol changes from to , release the button).

Query:

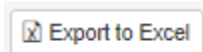
Enter Start Date of Date eHNA Started (3 Months) [≥] 01/01/2021
 Enter End Date of Date eHNA Started (3 Months) [≤] 21/09/2021
 Enter 5 digit code of your Organisation [=] rvvkc

Drag a column header and drop it here to group by that column

| NHS Number | Hospital Number | Surname | Forename | Referral Request Date | Diagnosis Date | Primary Diagnosis | Date HNA Offered | HNA Offering HNA | Point in Pathway HNA Offered | HNA For |
|------------|-----------------|---------|----------|-----------------------|----------------|-------------------|------------------|------------------|------------------------------|---------|
| | | | | 22/08/2021 | 08/09/2021 | C81 - Malignant | | | | |

3) Exporting tracking list to an Excel Spreadsheet

- The list can be exported to Excel by clicking on the 'Export to Excel' button



- The document will then load at the bottom of your web browser

| | | | | | |
|--|--|--|--|---------------------|---------------------|
| | | | | 13/11/2020 00:00:00 | 23/12/2020 00:00:00 |
| | | | | 26/11/2020 00:00:00 | 12/01/2021 00:00:00 |

20210921T1057 -.....xlsx ^

Click on this to launch it in the Excel Spreadsheet application.

- Once opened the data can then be manipulated using the Excel functions such as Sort and Filter etc. The file can be saved to an appropriate location.

Appendix 1

HNA Tracking/Worklists

The worklists have been configured to display a list of patients that match a set of pre-determined criteria.

The results that are displayed relate to data items that are completed in the individual patient HNA/Care Plan records.

Once the parameters have been entered it can take a while for the results to appear. A process in the background checks all of the data within Infoflex to find results that match the criteria selected.

- **DATA – 1. HNA Top 3 Concerns (All)**

Will return the patients top 3 concerns if they have;

- An HNA Completed at a specified trust.
- An HNA Completed within a specified time period.
- A Primary Diagnosis entered (ICD)
- A Care Plan Status is either Pending, In Progress or Complete.

- **DATA – 2. HNA Top 3 Concerns (By Tumour Group)**

Will return the patients top 3 concerns if they have;

- An HNA Completed at a specified trust.
- An HNA Completed within a specified time period.
- A Diagnosis in the specified Tumour Group.
- A Primary Diagnosis entered (ICD)
- A Care Plan Status is either Pending, In Progress or Complete.

- **DATA – 3. HNA Completed – At End of Treatment (1st Definitive Only)**

Will return all patients;

- With an HNA Completed at a specified trust.
- With an HNA Completed within a specified time period.
- With a First Definitive Treatment Start Date.
- Who were offered the HNA at '04 – End of Treatment'. (*Point in pathway Assessment Offered/Completed*)

- **DATA – 4. HNA Care Plan Completed – At End of Treatment (1st Definitive Only)**

Will return all patients;

- With an HNA Completed at a specified trust.
- With an HNA Completed within a specified time period.
- With a First Definitive Treatment Start Date.
- Who were offered the HNA at '04 – End of Treatment'. (*Point in pathway Assessment Offered/Completed*)

- Who have a Care Plan Status is '03 – Care Plan Complete'.
- **DATA – 5. HNA Completed – within 31 Days of Diagnosis**
Will return all patients;
 - Diagnosed at a specified trust.
 - With an HNA Offered within a specified time period.
 - Where the Date the HNA Completed is not blank.
 - That have a Primary Diagnosis entered (ICD)
 - Whose HNA was completed within 31 days of their Diagnosis date.

**NOTE: Patients whose HNA was completed prior to their official Diagnosis Date will be included in the returns. **

- **DATA – 6. HNA Initiated – Care Plan Completed within 31 Days of Diagnosis**
Will return all patients;
 - Diagnosed at a specified trust.
 - With an HNA Offered within a specified time period.
 - Where the Care Plan Status equals '03 – Care Plan Complete'.
 - That have a Primary Diagnosis entered (ICD)
 - Whose Care Plan was agreed within 31 days of their Diagnosis date.

**NOTE: Patients whose Care Plan was completed prior to their official Diagnosis Date will be included in the returns. **

- **DATA – 7. Count of First Definitive Treatment Pathways (All Tumour Sites)**
Will return a number, for patients;
 - Treated at a specified Trust
 - Between specified Decision to Treat Dates
- **DATA – 8. Count of First Definitive Treatment Pathways (By Tumour Sites)**
Will return a number, for patients;
 - Treated at a specified Trust
 - Between specified Decision to Treat Dates
 - For a specified Tumour site (picked from a list)

Diagnosed – No HNA

Will return all patients;

- With no HNA initiated
- Diagnosed at a specified trust
- Within a user selected period of time of when the diagnosis was recorded.

HNA Initiated-Care Plan Complete

Will return all patients;

- With a completed HNA Assessment
- With a care plan where the 'Care Plan Status' is recorded as 'Care plan complete'

HNA Initiated-Care Plan In Progress

Will return all patients;

- With a completed HNA Assessment
- With a care plan where the 'Care Plan Status' is recorded as 'Care plan in progress'

HNA Initiated-Care Plan Not required

Will return all patients;

- With a completed HNA Assessment
- With a care plan where the 'Care Plan Status' is recorded as 'No care plan required'

HNA Initiated-Care Plan Pending

Will return all patients;

- With a completed HNA Assessment
- With a care plan where the 'Care Plan Status' is recorded as 'Pending care plan'

HNA Last 3 Months

Will return all patients;

- With a completed HNA Assessment
- In a user selected time period based on Date HNA Offered (usually 3-month period)

HNA Offer Only-Accepted

Will return all patients;

- In a user specified time period based on the patient's diagnosis date
- With an 'Action to complete' of 'Record offer details only'
- With an 'HNA Offer Status' of 'Accepted'
- At the Hospital site of the keyworker offering assessment's base

HNA Offer Only-Declined

Will return all patients;

- In a user specified period based on the patient's diagnosis date
- With an 'Action to complete' of 'Record offer details only'
- With an 'HNA Offer Status' of 'Declined'
- At the Hospital site of the keyworker offering assessment's base

- **HNA Patients (All HNA Initiated)**

Will return all patients;

- Where a 'Setting up the assessment' (step 1 min.) screen has been completed
- At the Hospital site of the keyworker offering assessment's base
- In a user specified period based on the patient's diagnosis date
- With any HNA Offer Status

HNA Review Due

Will return all patients;

- In a user specified time period based on 'Next review date' from the 'Care Plan Details'
- With a completed HNA Assessment
- With a date entered into the field 'Next review date'

HNA-Accepted

Will return all patients;

- Where a 'Setting up the assessment' (step 1 min.) screen has been completed
- At the Hospital site of the keyworker offering assessment's base
- In a user specified period based on the patient's diagnosis date
- With an HNA Offer Status of 'Accepted'

HNA-Declined

Will return all patients;

- Where a 'Setting up the assessment' (step 1 min.) screen has been completed
- At the Hospital site of the keyworker offering assessment's base
- In a user specified period based on the patient's diagnosis date
- With an HNA Offer Status of 'Declined'

Appendix 2
5 digit Organisation Codes

MTW:

Maidstone Hospital – RWF03

Tunbridge Wells Hospital – RWFTW

EKHUFT:

Kent and Canterbury Hospital – RVVKC

William Harvey Hospital – RVV01

Queen Elizabeth the Queen Mother Hospital – RVV09

D&G

Dartford Hospital – RN707

Queen Mary's Hospital Sidcup – RN7QM

MFT:

Medway Maritime Hospital – RPA02