

# CMC103: Reviewing, Updating and Recording Death

Welcome to *Reviewing, Updating and Recording Death*. This module contains three instructional lessons, plus several quiz questions. The videos and simulations in this module are best if viewed full screen.

This module explains how to find a patient's care plan and the difference between opening a care plan in View Only and Editing mode. Specific use cases are described including:

- Patient death.
- Withdrawn consent.
- Restricted records.

**Prerequisite Learning or Experience** [CMC102 Creating a New Care Plan](#)

**Audience** Administrative users – those who create and edit care plans on behalf of clinicians.  
Clinical users – those who also create, edit and review care plans and in addition have the authority to approve care plans.

**Learning Objectives** By the end of this module, you will be able to:

1. Find a patient's care plan.
2. Identify care plans needing review.
3. Print a care plan.
4. Update a care plan.
5. Record a patient death.
6. Restrict a patient's record.

**Duration** 30 minutes.

**Grading Criteria** This module is not graded; quiz questions are provided for self-assessment.

**Resources Needed** None.

**Questions, Comments, or Feedback?** Contact us at [cmc\\_training@nhs.net](mailto:cmc_training@nhs.net).

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## Module Introduction

### Module Introduction

#### Module Introduction

Welcome to *Reviewing, Updating and Recording Death*. This module contains three instructional lessons, plus several quiz questions. The videos and simulations in this module are best if viewed full screen.

This module explains how to find a patient's care plan and the difference between opening a care plan in View Only and Editing mode. Specific use cases are described including:

- Patient death.
- Withdrawn consent.
- Restricted records.

By the end of this course, you will be able to:

1. Find a patient's care plan.
2. Identify care plans needing review.
3. Print a care plan.
4. Update a care plan.
5. Record a patient death.
6. Restrict access to a patient's record.

# 1 Finding and Viewing a Care Plan

## 1.1 Care Plan Search

### 1.1.1 Introduction (text)

This lesson describes the ways in which administrative and clinical users can find a care plan and explains the difference between opening the plan in Editing mode and opening the plan in View Only mode.

### 1.1.2 Searching for a Care Plan (text/image)

Users, who will know specific details about the patient, have two different means of searching for a care plan: either by NHS number or by demographic details.

#### 1. By NHS Number

This search option is available from the Create a Care Plan and Find a Patient tasks.

Both NHS number and date of birth are required fields.

### Find a Patient

The screenshot shows the 'Find a Patient' search form with the 'By NHS Number' tab selected. The form includes a text input field for 'NHS Number \*', a date selection interface for 'Date of Birth \*' with dropdowns for Day, Month, and Year, and a 'Reset' link. A purple 'Find' button is located at the bottom right.

#### 2. By Surname

This search option is also available from the Create a Care Plan and Find a Patient Tasks.

Surname, date of birth and gender are required fields.

First name and post code can be used to further narrow search results.

The screenshot shows the 'Find a Patient' search form with the 'By Surname' tab selected. The form includes text input fields for 'Surname \*', 'First Name', and 'Post Code'. It also features a date selection interface for 'Date of Birth \*' with dropdowns for Day, Month, and Year, and a 'Reset' link. A purple 'Find' button is located at the bottom right.

### 1.1.3 Search Results (text/image)

In the care plan search results, each care plan will have a **View** and an **Edit** button.

Existing Care Plans: 1 result

<b>Imelda Avery</b>		<b>View</b>
NHS Number	306 914 6333	<b>Edit</b>
Born	24 Apr 2004 (Age 11)	
Gender	Female	
Address	1488 Franklin Avenue Albany SW1A 2AA	

Click **Edit** to open the care plan in Editing mode. If a draft exists, that draft will be opened and the last saved date and time will be displayed. If a draft does not already exist, a new one will be started.

State of Care Plan: **Draft, Editing**  
Last saved on: **15 Oct 2015 at 06:52**



Click **View** to open the care plan in View Only mode. If a published care plan exists for the patient, then that care plan will be displayed. If no published care plan exists, then the draft will be displayed in View Only. Users in View Only mode who need to update the care plan can quickly and easily switch to Edit mode.

State of Care Plan: **Draft, View Only**

### 1.1.4 System Modes (text/image)

As mentioned, a care plan can be opened in one of two modes: Editing or View Only. Typically, View Only mode provides the ability to view a published care plan while Editing mode opens a draft to edit. The current mode is displayed in the care plan banner.

Editing mode allows changes to be made to the care plan data; View Only mode does not. Only use Edit mode if you intend to edit or review a patient's care plan as this may generate a draft care plan, which will require further work and approval. Use the View Only mode if you simply wish to be informed about the patient's care plan. Once in View Only mode you can quickly and easily switch to edit mode.

Administrative and clinical users can open published care plans in View Only mode and draft care plans in Editing mode.

State of Care Plan: **Draft, Editing**  
Last saved on: **15 Oct 2015 at 06:52**



If an administrative or clinical user tries to open a care plan in View Only mode but no care plan has yet been published for the patient, a draft care plan, if it exists, will be opened in View Only mode.

State of Care Plan: **Draft, View Only**

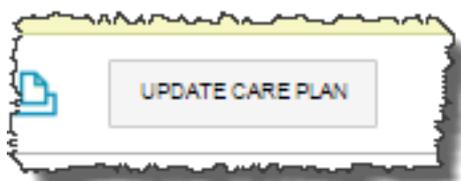
Urgent care staff can open only published care plans, and then only in View Only mode; they do not have access to Editing mode.

State of Care Plan: **Published, View Only**  
Last saved on: **15 Oct 2015 at 06:53**



#### 1.1.5 Switching Modes (text/image)

To switch from View Only mode to Editing mode, click **Update Care Plan** in the care plan banner.



#### 1.1.6 Duplications (text)

The Coordinate My Care (CMC) system is designed to reduce the possibility of duplicate care plans being created for a patient, however this may sometimes happen. If you encounter a patient for whom there appears to be duplicate care plans, please contact CMC via telephone:

*Phone:* 020 7811 8513

*Hours:* Monday to Friday from 9am to 5pm

*Email:* [coordinatemycare@nhs.net](mailto:coordinatemycare@nhs.net) Please include CMC IDs for both patients.

### 1.1.7 Summary (text)

Patient care plans can be found using the NHS number and demographics searches available from the Create a Care Plan and Find a Patient tasks.

Administrative and clinical users can open results in either View Only mode or Editing mode.

The View Only display mode mimic the functionality available to urgent care users. For more information about how urgent care users interact with care plans, see [CMC104 Viewing Care Plans](#).

## 1.2 Care Plan Lists

### 1.2.1 Introduction (text)

There are two means of seeing groupings of care plans. This lesson reviews the home screen Action Needed list which can be filtered to group care plans by task, and it explains the View Patient List task which provides a list of all the patients a user's team or organisation has claimed a legitimate relationship with.

### 1.2.2 Action Needed List (text/image)

Recall that your home screen lists all the care plans for which your organisation is responsible and which need “action” by you or by someone else in your organisation.

Care plans in the Action Needed list will need to have one of three tasks performed:

**FINALISE**

The care plan is a draft; data entry for the care plan should be completed and the care plan approved or submitted for approval by a clinician.

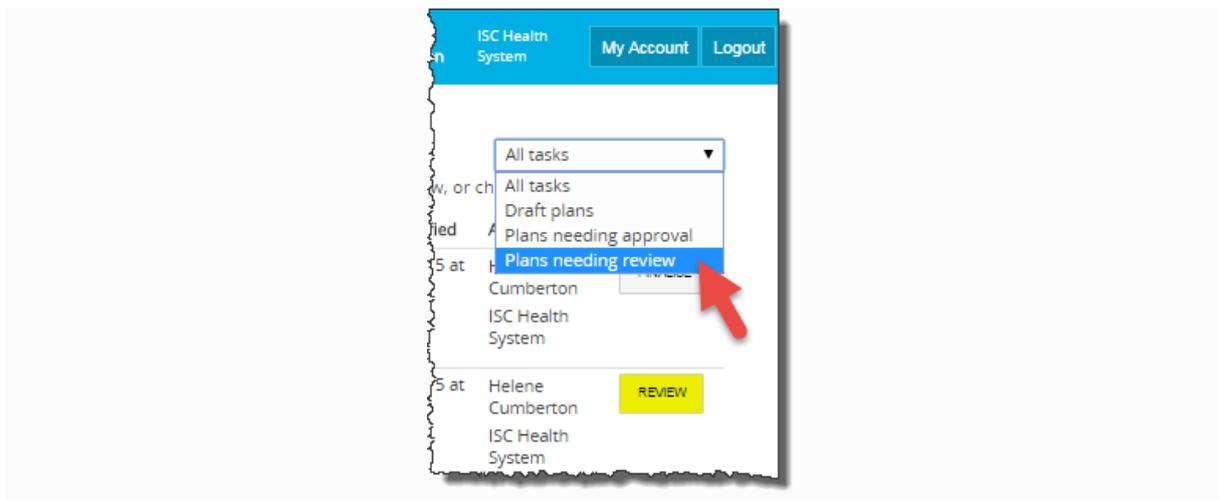
**APPROVE**

The care plan is a draft, but an administrative user has completed the data entry for the care plan and submitted it for approval by a clinician.

**REVIEW**

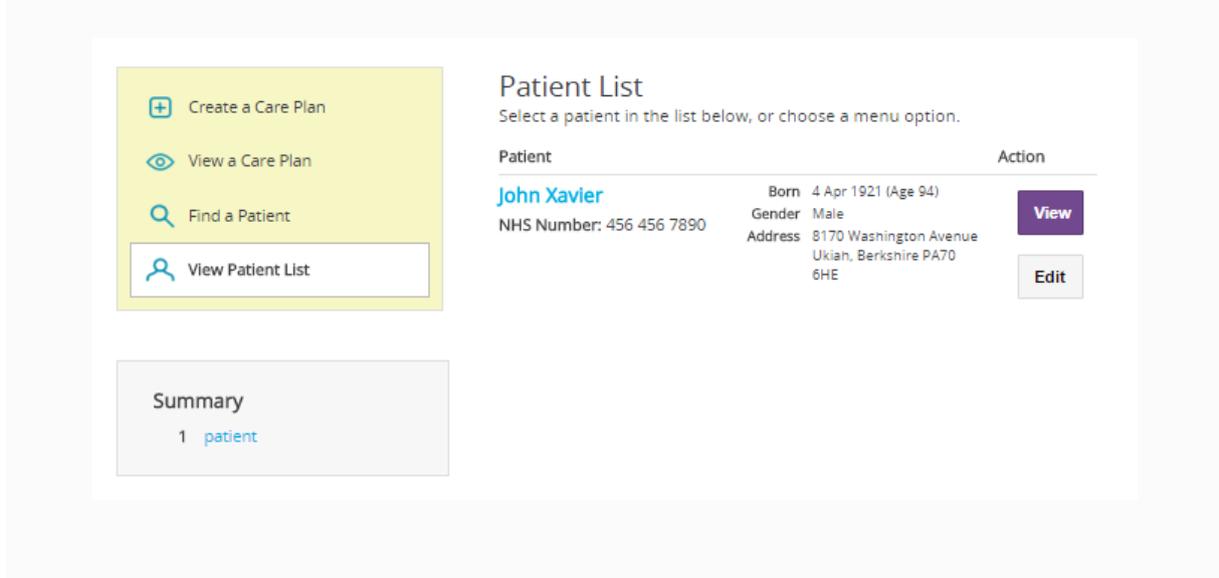
The care plan is published, but the review date is approaching and the plan should be reviewed, updated as appropriate and re-approved.

You can view a list of care plans requiring a specific task by filtering the Action Needed list.



### 1.2.3 View Patient Lists (text/image)

The View Patient List task provides a list of patients with whom your team or organisation has claimed a legitimate relationship. Editing and View Only modes are available for each patient in the list, regardless of whether there are any outstanding tasks for them either to finalise, approve or review.



### 1.2.4 Summary (text)

From the home screen, care plans for an organisation with tasks due can be filtered by task type.

A list of all care plans for which the user's team or organisation has a legitimate relationship can be viewed under the View Patient List task.

## 1.3 Printing a Care Plan

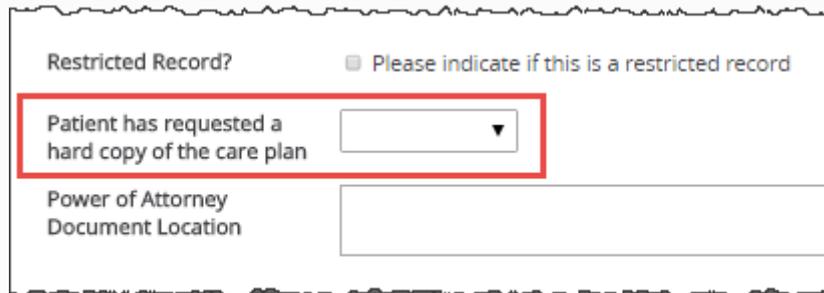
### 1.3.1 Printing a Care Plan (text/image)

Published care plans can be printed using the print icon in the care plan banner.



The care plan will open in a new browser window or tab as a PDF file, which can then be printed.

If the care plan is being printed at the request of the patient, then the user printing the care plan should set the **Patient has requested a hard copy** flag to *Yes*, to inform the patient's care team that as the care plan is updated, the patient may have an out of date hard copy. This flag can be found on the consent screen and updating it will require the care plan to be re-approved.



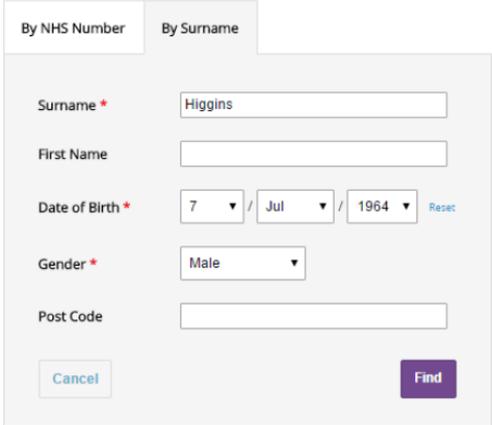
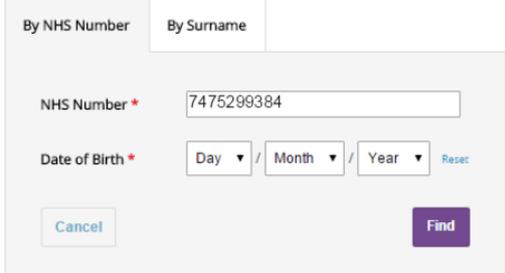
Restricted Record?  Please indicate if this is a restricted record

Patient has requested a hard copy of the care plan

Power of Attorney Document Location

## 1.4 Simulation

### 1.4.1 Simulation

Instructions to the user	Notes for Simulation
<p>Overview</p> <p>In this simulation you will find a patient care plan using each of the three search methods. You will also print a published care plan.</p>	
<p>1. Using the <b>Create a Care Plan</b> NHS search, view the care plan for Eliza Doolittle.            NHS number: 675 431 8198            DOB: 6 June 1964</p>	<p>Find a Patient</p> 
<p>What is the state of Eliza's care plan? (Draft, View Only)</p>	<p>State of Care Plan: <b>Draft, View Only</b>            Last saved on: <b>4 Nov 2015 at 06:47</b></p>
<p>2. Using the <b>Find a Patient</b> demographics search, edit the care plan for Henry Higgins            Surname: Higgins            Date of Birth: 7 July 1964            Gender: Male</p>	<p>Find a Patient</p> 
<p>What is the state of Henry's care plan? (Draft, Editing)</p>	<p>State of Care Plan: <b>Draft, Editing</b>            Last saved on: <b>4 Nov 2015 at 06:51</b></p>
<p>3. Using the <b>Find a Patient</b> search, view the care plan for Hugh Pickering.            NHS Number: 7475299384</p>	<p>Find a Patient</p> 
<p>What is the state of Hugh's care plan?</p>	<p>State of Care Plan: <b>Published, View Only</b>            Last saved on: <b>4 Nov 2015 at 09:01</b></p>
<p>Print Hugh's care plan.            Hugh's care plan has been printed and is now open for editing</p>	

## 2 Updating an Existing Care Plan

### 2.1 Care Plan Review

#### 2.1.1 Introduction (text)

Timely review of patient care plans increases urgent care confidence in the accuracy of the information they contain.

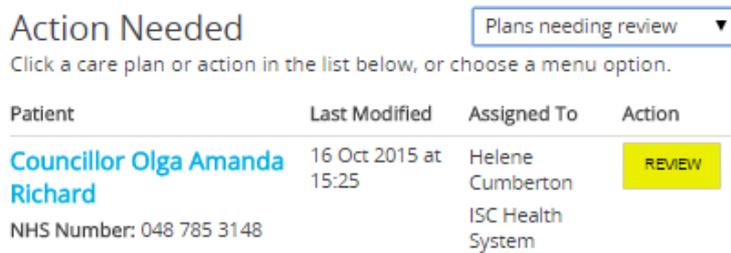
This lesson explains what happens when a care plan is due for review. It also describes the urgent care update functionality which urgent care staff will use to make the patient's care team aware of important urgent care events.

#### 2.1.2 Review Tasks (text/image)

Recall that when a care plan is published the approver chooses a review date, review organisation, and optionally, a clinician responsible for the review.

While care plans can be reviewed and updated at any time, to encourage timely clinical review of care plans, the CMC system will:

- Create a review task 14 days before the selected review date. This task will be added to the Action Needed list for all clinical users of the review team or organisation.
- Email a reminder to the clinician responsible for performing the review, if one was chosen when the care plan was approved. If no clinician owns the task, all users with clinical roles at the selected team or organisation will receive an email.



Patient	Last Modified	Assigned To	Action
<b>Councillor Olga Amanda Richard</b> NHS Number: 048 785 3148	16 Oct 2015 at 15:25	Helene Cumberton ISC Health System	<b>REVIEW</b>

Figure 1: Helene Cumberton will receive an email 1 day before the care plan review date.

- Email another reminder to both the responsible clinician and all clinical users in the responsible team or organisation seven days after the review date.
- Email a reminder to CMC 14 days after the review date, if no action has been taken.

#### 2.1.3 Urgent Care Updates (text/image)

When urgent care users view a care plan, the system audits that the care plan has been accessed and adds an urgent care update to the care plan. The urgent care user can add a note to urgent care update, providing details about why they viewed the care plan and what action was taken on behalf of the patient. These details may be useful when reviewing the patient's care plan.

Below is an example of an urgent care update, with details about the patient's condition.

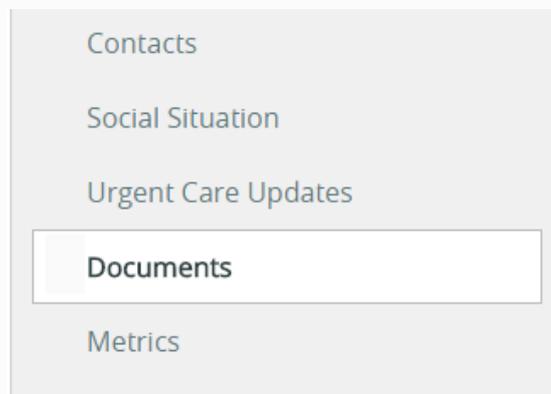
## Urgent Care Updates

### Updates Attached to Care Plan

Provider & Organisation	Date	Note
John Watson LONDON AMBULANCE SERVICE NHS TRUST	9 Nov 2015 at 15:35	Wife called because George had fallen and she could not help him back to bed. She reports he is generally weaker and needs more assistance. He has been referred to his own GP.

### 2.1.4 Viewing Documents (text/image)

Some data may only be available in a care plan on an attached document. To view documents within a care plan, navigate to the **Documents** tab on the left side of the screen.



This will pull up a list of all documents attached to the current care plan. Select the **View** button on the right to view the contents of the attachment. In the care plan below, you will see that there is one document attached to the care plan: a DNACPR.

### Documents

Documents Attached to Care Plan

Type	Title	Date/Time	Uploaded By	Additional Details
Do Not Attempt CPR Document		9 Nov 2015 at 20:52:44	Shilpa Patel at PARK END SURGERY	<a href="#">View</a>

< Urgent Care Updates Urgent Care Summary >

### 2.1.5 Summary (text)

Care plan tasks will appear in a team or organisation's Action Needed list 14 days before the care plan review date. Email reminders will be sent to encourage clinical users to review the care plans by the review date. Comments added by urgent care users should be taken into consideration when reviewing a care plan.

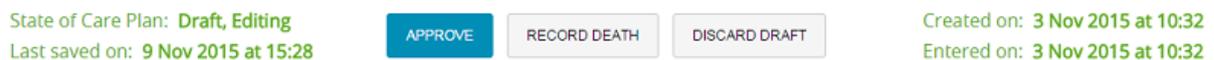
## 2.2 Updating Care Plan Details

### 2.2.1 Introduction (text)

The majority of the care plan can be edited as demonstrated in [CMC102 Creating a New Care Plan](#).

This lesson explains the date and timestamps that appear in different areas of the care plan.

### 2.2.2 Timestamps (text/image)



The screenshot shows a care plan banner with the following elements: On the left, the text 'State of Care Plan: Draft, Editing' and 'Last saved on: 9 Nov 2015 at 15:28'. In the center, three buttons: 'APPROVE' (blue), 'RECORD DEATH' (grey), and 'DISCARD DRAFT' (grey). On the right, the text 'Created on: 3 Nov 2015 at 10:32' and 'Entered on: 3 Nov 2015 at 10:32'.

The care plan banner displays the care plan state and two important timestamps. If the state is *Draft, Editing* and an asterisk (\*) is displayed, then changes made to the draft have not yet been saved. Save the care plan by switching back to the previous screen. If you created the draft in error and would prefer to delete the draft, you can click the **Discard** button.

The two important timestamps are:

- **Last saved on:** the date and time on which the draft was last updated and saved.
- **Created on:** the date and time on which the care plan was first created.

### 2.2.3 Last Edited Date

In addition to the timestamps in the care plan banner, there are last edited timestamps together with the name of the user who made the change in three important sections of the care plan:

- Patient Consent.
- Significant Medical Background – Significant Diagnoses.
- Medication.

If more than one member of the patient's care team will be updating the care plan, these timestamps will alert you to whether others have been making changes.

It is important to pay attention to the last edited dates as there is a risk that someone who is familiar with a care plan may fail to notice that someone else has updated the care plan since last viewing it.

### 2.2.4 Patient Details (PDS) (text/image)

Patient details can be updated via a service called the Personal Demographics Services (PDS). This is done manually by clicking **Check for Updates** on the Patient Details screen.

The existing CMC care plan data will be displayed next to the current PDS data. All data available from PDS can be updated by clicking **Apply**. Or click **Cancel** to leave the care plan as it is.

Property	Value in Care Plan	Value from PDS
NHS Number	655 051 1739	655 051 1739
Last Name	on	on
First Name	john	J
Gender	Not Known	Not Known
Date Of Birth	1990-08-03	1990-08-03
Date Of Death		
Primary Address		
Line 1	2070 Second Street	2070 Second Street
Line 2		
Town	Pueblo	Pueblo
County	Worcestershire	Worcestershire
Postcode	YO19 6SG	YO19 6SG
Temporary Address		
Line 1	2070 Second Street	2070 Second Street
Line 2		
Town	Pueblo	Pueblo
County	Worcestershire	Worcestershire
Postcode	YO19 6SG	YO19 6SG
Home Phone		
Contact Value		550-243-4167

When you have clicked **Apply**, you will receive notification that the record has been updated.

If the patient has moved outside of London it is the clinician's responsibility to inform the patient that the CMC care plan may not be visible to urgent care as they will have moved out of the area that CMC currently covers. In these circumstances they should phone the CMC helpdesk for further guidance and clarification:

*Phone:* 020 7811 8513

*Hours:* Monday to Friday from 9am to 5pm

It is possible that a patient's date of death may be imported from PDS. See 3.2.3 Recording Patient Death for more information on what happens to the care plan when patient death is recorded.

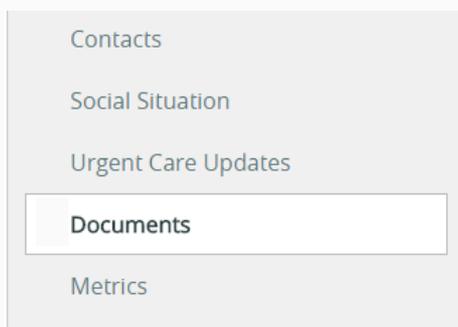
### 2.2.5 Medication (text/image)

Medication entered before the CMC system was upgraded in November 2015 will be identifiable by the designation *Migrated Medication* in the medication name field.

When the care plan is reviewed, the medication list should be checked and updated as appropriate.

### 2.2.6 Attaching Documents (text/image)

To attach documents to a care plan, first select **Documents** from the navigation menu.



Then, select **Add a document** on the Documents screen and upload your document. Be sure to select the document type, as this will alert other users what information the document contains.

Once you click **Done**, you are returned to the Documents screen, where you can see that your document has been uploaded and is stored as the type assigned:

Documents Attached to Care Plan

Type	Title	Date/Time	Uploaded By	Additional Details
Do Not Attempt CPR Document		9 Nov 2015 at 20:52:44	Shilpa Patel at PARK END SURGERY	<a href="#">View</a>

[Add a document](#)

### 2.2.7 Metrics (text)

The Metrics tab is an extra option that services are welcome to use if they find it helpful. It is likely to be of most interest to clinicians working in specialist palliative care and can be added by either administrative or clinical users. Note, though, that the Metrics screen must be filled in completely or not at all, which may affect whether or not your service opts to use it.

The Metrics tab provides a template for recording items like the incidence and scoring for symptom distress and the changing phases of a palliative care patient. This information could be used for audit, research and service evaluation at a local level. Metrics from your service are stored for later reference by CMC, but are not viewable or editable by the end user.

Though the metrics are available via a patient's care plan, they are not part of the care plan, and can be submitted even for patients without a published care plan. As such, updates to the Metrics screen do not need to be approved via the care plan approval process. Instead, the user entering the data can simply click **Submit Metrics** when the metrics are fully entered.

### 2.2.8 Approval Process (text)

The approval process for updated care plans is the same as for new care plans:

- Administrative users submit the care plan for clinical approval.
- Clinical users should approve the care plan.

Note that, as with new care plans, updated care plans also need to be published before they can be viewed by urgent care users.

### 2.2.9 Summary (text)

Date and timestamps appear in different areas of the care plan to quickly identify when a care plan was last updated. Special attention needs to be made to these dates as you cannot assume the care plan is unchanged since you last viewed it.

## 2.3 Updates that end the Care Plan Life Cycle

### 2.3.1 Introduction (text)

Once published, care plans remain available to urgent care users until consent is withdrawn or the patient's death is recorded.

### 2.3.2 Withdrawing Patient Consent (text/image)

Patient consent can be withdrawn at any time. To withdraw consent, search for the patient's care plan and choose to edit or update the care plan as appropriate. On the patient consent screen, set the consent method to **Consent is now withdrawn**.

**Consent Type \*** Please select the consent type.

- The patient is an adult (18+) and has agreed to the creation of a personalised care plan and sharing of information as above
- The patient is an adult (18+) but lacks mental capacity to make the above decisions. Consent has been given by an appointed person with Lasting Power of Attorney for Health and Welfare
- The patient is an adult (18+) but lacks mental capacity to make the above decisions. A clinical decision has been made in their best interest in consultation with the family/carers
- Consent is now withdrawn**

A pop-up will be displayed which asks the user to confirm this decision. **NOTE:** Consent is not withdrawn until the updated care plan is approved.

When consent is withdrawn, the care plan will no longer be available to all users and will not be returned in search results. If at any point in the future the patient again gives consent, then a new care plan will need to be created. If the consent has been withdrawn in error, please contact CMC:

*Phone:* 020 7811 8513

*Hours:* Monday to Friday from 9am to 5pm

### 2.3.3 Recording Patient Death (text/image)

It is possible that a patient death will be recorded when PDS updates are applied.

In other cases, you may hear about patient death from the patient's family or other clinicians.

To record the patient's death, open the care plan in Editing mode and click on Record Death in the care plan banner.



Enter as much detail as possible about where and when the patient died. If the patient did not die in their preferred place of death, then it is important to record the reason for this, if it is known. Data on place of death is a key part of CMC reporting.

**Recording Death**

**Date of Death** Please enter the date of the patient's death.  
17 / Oct / 2015 [Today](#) [Reset](#)

**Place of Death** Hospice

**Other Details** Details on place of death

**Reason for Variance** Carer Changed Mind

**Other Details** Burden of care was too much for family.

**Source of Information** Daughter

Once a patient's death has been recorded and change in the care plan has been approved, the care plan will no longer be available to urgent care users. Administrative and clinical users will be able to access the care plan and will be able to open it in View Only mode; no further updates can be made to the care plan.

Below is the patient banner of a deceased patient. Notice that it includes the patient's date of death and age at time of death.

<b>john ON</b> Deceased NHS No: 655 051 1739	Born: 3 Aug 1990 Died: 17 Oct 2015 (Age 25) Gender: Not Known	Address: 2070 Second Street Pueblo, Worcestershire YO19 6SG
---	---	--

The patient will also be labelled as Deceased in search results:

Existing Care Plans: 1 result

john on **Deceased**

NHS Number 655 051 1739  
Born 3 Aug 1990  
Died 17 Oct 2015 (Age 25)  
Gender Not Known  
Address 2070 Second Street  
Pueblo YO19 6SG

[View](#)

[Edit](#)

If the patient's death is recorded by mistake, please contact CMC:

*Phone:* 020 7811 8513

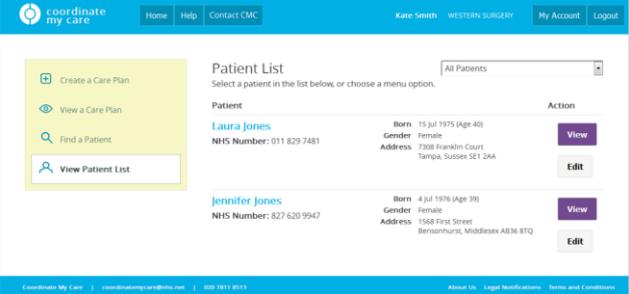
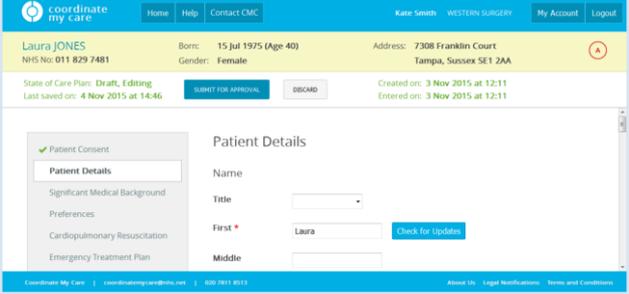
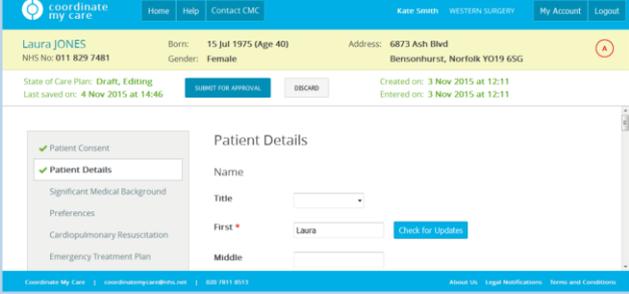
*Hours:* Monday to Friday from 9am to 5pm

#### 2.3.4 Summary (text)

When consent for the care plan is withdrawn or a patient's death is recorded, the care plan will no longer be available to urgent care users. However, administrative and clinical users will have read-only access to care plans for deceased patients.

## 2.4 Simulation

### 2.4.1 Simulation – PDS Updates

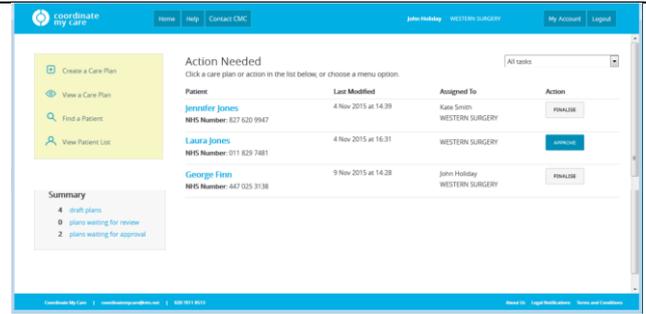
Instruction to the user	Notes for Simulation
<p><b>Overview</b></p> <p>In this simulation you will select a care plan from your patient list and update the patient's demographics. You are already logged in as administrative user Kate Smith.</p>	
<p>Open your patient list. Edit the care plan for Laura Jones.</p>	
<p>Update Laura's demographic details from PDS.</p>	
<p>Submit Laura's care plan for approval.</p>	
<p>You have updated and submitted Laura's new demographics for approval.</p>	

### 2.4.2 Simulation – Review Urgent Care Updates

Setup: Log in as an urgent care user.

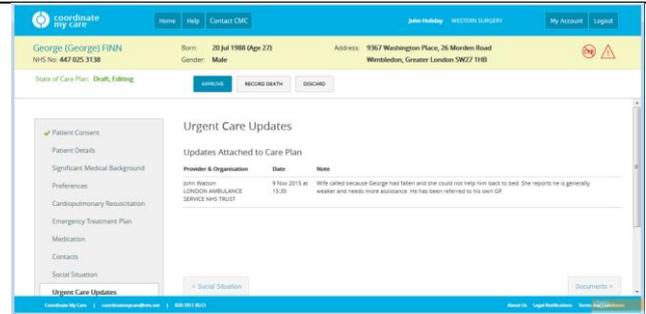
Instruction to the user	Notes for Simulation
<p><b>Overview of exercise</b></p> <p>In this simulation, you are an urgent care user. You will view a care plan and update the urgent care update record about why we viewed the record.</p>	

Select George Finn's care plan in the Action Needed list.



Navigate to the **Urgent Care Updates** tab to review notes made by urgent care staff.

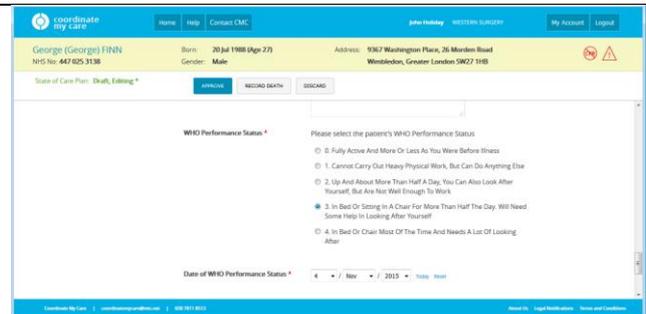
Notice that John Watson, a member of urgent care staff, has added a note that George has fallen again. In response, his GP, John Holiday has determined George's WHO status should be updated. Navigate to **Significant Medical Background** to make this change.



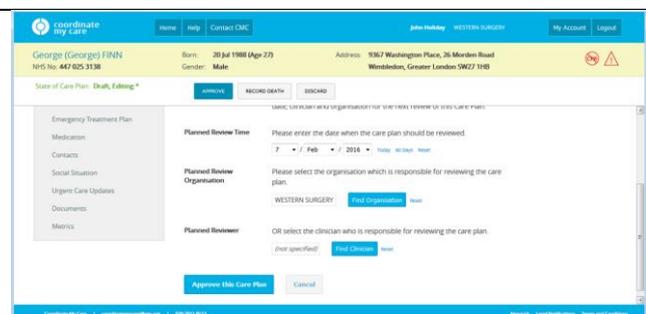
Scroll down.

Update WHO status to 3.

Select APPROVE to approve the change to the care plan.

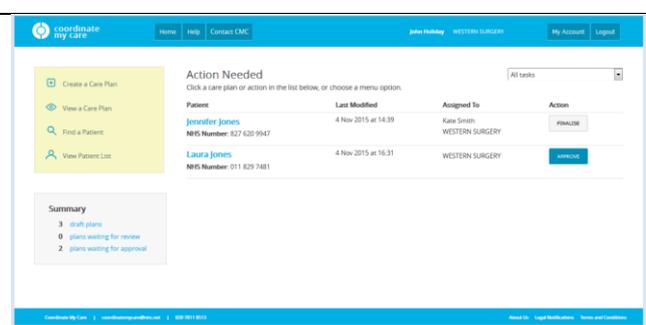


Scroll down and approve this care plan.

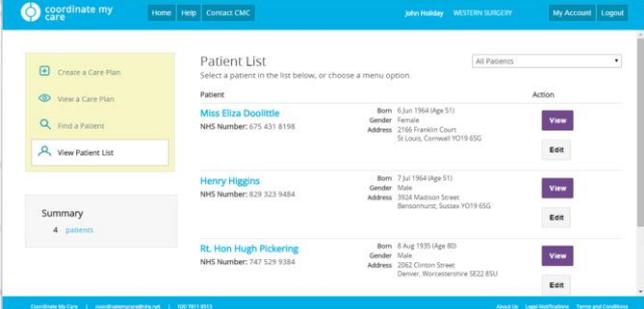
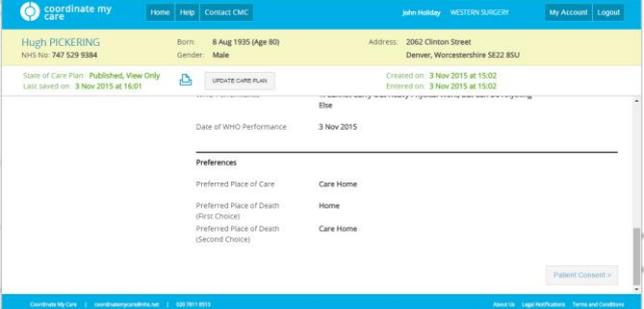
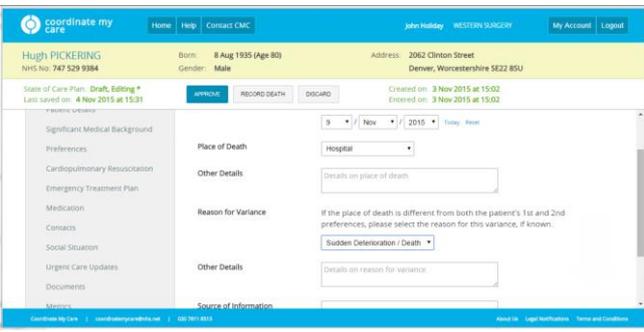


George Finn is no longer in your Action Need list.

You have now reviewed urgent care updates for George Finn and updated his WHO Performance Status.



### 2.4.3 Simulation – Record a death

Instruction to the user	Notes for Simulation
<p><b>Overview</b></p> <p>The spouse of one of your patients has informed you that the patient has died. In this simulation you will update the patient's date of death.</p>	
<p>Use your patient list to open Hugh Pickering's care plan.</p> <p>View Hugh's care plan.</p>	
<p>Look at his place of death preferences. What is Hugh's preferred place of death? Home.</p> <p>Update Hugh's care plan.</p>	
<p>Select <b>Record Death</b>. Scroll to the bottom and record Date of Death 9<sup>th</sup> Nov 2015, and place of death as Hospital.</p> <p>Because Hugh did not die in his preferred place, record the <b>Reason for Variance</b> as Sudden Deterioration/Death.</p> <p>Scroll down and enter the source of information as his wife. Select Approve to approve the care plan.</p>	
<p>Approve the care plan.</p>	

## Module Conclusion

### C.1 Module Conclusion

#### C.1.1 Module Summary

Care plans may be updated at any time, and timestamps can be seen in the care plan banner as well as in some sections of the care plan data. All updates must be approved by a clinician, including changes to patient consent and patient death information. Care plans can be found using the searches under Create a Care Plan, Find a Patient or View a Care Plan.

Care plans that need to be reviewed can be identified from the home screen Action Needed list, and a list of all patients with whom the user's team or organisation has claimed a legitimate relationship can be found under the View Patient List task.

Feedback on this module can be provided to Coordinate My Care via email.

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