

Using the GPASS Integrated Version of QuickTrace/ColourTrace

You must be logged on to GPASS to operate QuickTrace /ColourTrace in this mode!

Synchronising Patient Data

Previous versions of QuickTrace were based entirely upon a separate database of patient information. Consequently if a patient was added or edited in GPASS, the same changes needed to be manually made in QuickTrace. From Version 3.2.0 of QuickTrace synchronisation of this data is automatic. Synchronisation can take place in two ways, Firstly there is bulk synchronisation where all significant changes in the GPASS database are mapped to the QuickTrace database in a single operation. Secondly, each time an individual patient is selected in QuickTrace, the details in GPASS for that particular patient are copied to QuickTrace.

Configuring the System to Synchronise only the Required Patients

In GPASS, there are eight separate categories of patients - "Permanent", "Temporary Resident" etc. Each may be "Active" or "Deducted" and in addition may have User Markers to indicate special status. QuickTrace uses these categories and user markers to filter patients to be included in QuickTrace for tracing. Separately, users can filter patients for addition to the list of those for whom a colour tab should be printed in ColourTrace.

Active/Deducted Status

Deducted patients in GPASS for whom no record already exists in QuickTrace are not added to the QuickTrace database on synchronisation. When a patient is made deducted in GPASS for whom a record in QuickTrace already exists, the patient status in QuickTrace will be changed to "Inactive". This is reversed if the patient is subsequently Re-registered.

Home File Store

Where a practice has multiple clinical premises where notes may be kept, and "Default Premises" are assigned to each patient, these will correspond with file stores in QuickTrace. The "Default Premises" set in GPASS for each patient may then be mapped automatically to "File Stores" in QuickTrace. This is configured via the "View/System/GPASS Premises" option which allows the file stores in QuickTrace to be assigned to the corresponding premises in GPASS. On synchronisation, each patient will have the appropriate File Store allocated as "Home File Store" or will have the default file store allocated. However, in some circumstances, such as staff records designated as a separate file store, it may be necessary to prevent the "Home File Store" setting being automatically modified in QuickTrace. Hence each patient's home file store may be manually set in QuickTrace (via the Edit button on the File window for the patient) and then locked to prevent automatic editing by ticking the "Lock Home Location" checkbox.

Inclusion for QuickTrace

To allow only certain categories of GPASS patients to be synchronised to the QuickTrace database, the "View/System/General Preferences/Global-GPASS Synchronisation" option provides a facility for selection of the relevant categories. "Permanent" is always

selected. In addition, one or multiple User Markers may be specified. During synchronisation, the system checks for the existence of the any of the specified User Markers in the Clinical History for each GPASS patient. If found, this prevents the patient from being added to the QuickTrace database or has the effect of making them inactive, if previously added. This may, for example, be used to filter out dummy patients.

Inclusion for ColourTrace

An identical facility to that described above is provided for filtering patients added to the list to have a colour label printed. This is made available via the "View/System/ColourTrace Preferences/Global-GPASS Synchronisation". It is a second level of filtering, operating only on those patients added to the QuickTrace database, such that only those patients who should have a colour label printed are added to the list. If a patient's category in GPASS changes such to now be in the group who should be included for labelling when previously in the group to be filtered, this will result in the patient being added to the list. This is useful, if for example a patient who was previously a "Temporary Resident" becomes a "Permanent".

Running Bulk Synchronisation

This may only be initiated from a workstation where the option for Synchronisation has been set via "View/System/General Preferences. To manually initiate bulk synchronisation, select the "File/Synchronise Patients with external data source" option from the main menu. Synchronisation will now take place and progress will be indicated in the task window. On completion, a summary is provided on screen of the total numbers of patients edited, added, made inactive etc and of the consequent additional number of labels and colour tabs which have been added to the lists for printing. This information is also provided in the "Import Log" along with details of the edits etc carried out. Check this log file, especially if any errors are recorded. Archive or delete the file regularly as it is appended to, not replaced on each synchronisation.

Bulk synchronisation may also be initiated automatically - either on a regular timed basis such as every thirty minutes, or on first logging on to the system. These options are set via checkboxes on the "View/System/General Preferences" option ("Local" tab).

Looking up a Patient

Whenever an individual patient is selected in QuickTrace/ColourTrace and their details displayed, the details for that patient are first checked in GPASS and any changes mapped to the QuickTrace database. Note that if GPASS is not running, a log on to GPASS is initiated. If appropriate, the patient will be added to the lists for Batch Printing and/or ColourTrace. In fact, the same may occur even with a patient newly added in GPASS. Using the patient browser in QuickTrace to specify the required patient, with only Surname and/or Forename specified as lookup criteria, presents a list of patients obtained from GPASS. Consequently, it is possible to add a patient in GPASS then immediately switch to QuickTrace and select them.

Note that the patient browser provided in QuickTrace may, if preferred, be replaced by the GPASS patient browser. If you prefer to use the GPASS browser, this may be selected via the View/System/General Preferences option. This is not recommended due to possible confusion as to whether the browser window refers to GPASS or QuickTrace. In addition the QuickTrace native browser provides more appropriate lookup options.

Moving from GPASS Encounter to QuickTrace

A method is provided for selecting a patient in QuickTrace directly from GPASS. While working in GPASS, select the required patient via the patient browser or appointment module then press F8 (or right click and select New Encounter) to bring up a New Encounter window. You will see a "QuickTrace" tab. Click this tab to bring it to the front, revealing a button "Launch QuickTrace with patient details". Clicking this button will make QuickTrace the active application (initiating a log on to QuickTrace if it is not already running) and opening the Files window for the relevant patient. If QuickTrace is running minimised, its window will be opened automatically.

On opening the Files window for the patient, if the patient does not already exist in QuickTrace a new record is created. If the patient has different data in GPASS compared to that already stored in the QuickTrace database, the QuickTrace data is modified. You may be asked if you wish to print a label etc, just as if the patient had been added or edited directly in QuickTrace in previous versions.

Printing Labels

QuickTrace has a facility for printing labels for tracing related activities as well as for lab request forms and/or specimens directly to dedicated label printers. When operating integrated with GPASS, this functionality is extended to permit GPASS patient data to be included on labels. Note that a separate application, "LabelTrace for GPASS", provides similar functionality directly from the Encounter window. A list of the GPASS data fields which may be included is provided in a separate document "Designing Labels for LabelTrace - GPASS Version".

Note that batch label printing to these label printers also supports GPASS data but printing to inkjet/laser printers (Windows printer mode) does not currently support GPASS data. ColourTrace does not currently support GPASS data.

Printing GPASS Appointments

Printing appointment listings in GPASS in order to pull notes is a common task. As the current location of each set of notes is available within QuickTrace, a facility to print appointment listings is provided from within QuickTrace. These are based on the GPASS appointments data but include for each patient, the current location of their notes at the time the report was printed. The facility makes use of assigned premises, if any, to separate out groups of sessions and lists relevant sessions by clinician and session name. The appointment listings are accessed via the "Report/GPASS Appointments" option.

To begin, specify the date of interest (defaults to "today"), the premises of interest or "unassigned" and whether sessions should be sorted by start time or clinician. When this has been done, clicking the "retrieve Sessions" button will query GPASS for matching sessions which will then be listed. Each is listed with relevant clinician and name.

Now choose the session to be printed by clicking on it to highlight it. A set of sessions may be selected together by the usual Windows methods of Shift/click or Control/click. You may now choose whether the appointments within each session should be ordered on the printed report by Appointment time, Patient Name or Date of Birth. In each case the sort order may also be selected eg Earliest time First or Latest Time first, if ordering by Appointment Time.

When you are ready to print, click the "Print Appointment" button.