

# Adding Retrospective Data

Sometimes adding data retrospectively can feel complicated in a system that is designed for real time use. This step by step guide should help when adding data in retrospect.

It is first useful to understand how the system notifies patients and the running order of actions on the database. When a record is added to the system and an email address is present in the record, during the night the system runs through all records and sees where there is a new task for a patient to complete. Once it finds this it then sends an email, or SMS, to the patient. The system then takes a backup and at the same time checks for any tasks that are no longer relevant e.g. a 6-month task is outstanding but the 12-month task is now due so it removes the 6-month task because it is no longer relevant. The following day when the patient receives the email, or SMS, they click the link to go to the portal and complete the tasks that are now due and relevant.

First step is to **add the patient and the pathway** you want to add retrospective data to. When you are creating the pathway it is especially important to **choose an appropriate start date**. We would recommend this is the date of surgery or intervention.

The screenshot shows the 'My Dashboard' interface. On the left, there are three main sections: 'WORKLIST' (NO ITEMS FOR 20 JUL 2021 - 20 JUL 2021), 'TASKS' (2 CLINICIAN 1 PATIENT), and 'ADD PATIENT' (FIND PATIENT). The main content area displays patient information for 'EXAMPLE, Retrospective (F, 33y)' with SERIAL NO.: CR00004316, NHS: Unknown, and HOSP: Unknown. The 'Pathway' dropdown is set to 'Hip (Primary Arthroplasty) Pathway' and the 'Side' dropdown is set to 'Left'. The 'Start Date' field is highlighted with a yellow box and contains '01 Nov 2020'. Below this are two dropdown menus: 'Add to Worklist' (Do not create a worklist entry) and 'Add to Whiteboard' (Do not create a whiteboard entry). At the bottom right, there are three buttons: 'Add Pathway', 'Add & Open Pathway' (indicated by a yellow arrow), and 'Cancel'.

In this example, the patient had hip surgery on 01/11/20 (7 months prior to the writing of this article). This pathway collects baseline, 3-month, 6-month, 1-year, and 2-year scores. The pathway start date is marked as November 2020 as per the surgery date.

On selecting **Add and Open Pathway** you will see that it has **created the baseline tasks** that the patient should have filled out. They will be **dated appropriately** e.g., here they are dated as 18/10/20, 2 weeks prior to the pathway start date.

If you have **historic data** that you are manually going to input e.g. you collected paper baseline scores from this patient in October, you will need to **input this data on the day** you created the pathway otherwise the nightly cleanup process will delete the tasks. If this happens however, all is not lost as you can still create an Ad Hoc Task for the forms you want to manually input. Ensure to label the form as baseline and change the completion date to when it was that you collected the paper scores.

If you did not collect paper scores at the time, and are **only interested in collecting current and future scores**, overnight the cleanup process will delete any scores no longer due and when the patient logs in the following day they will only be presented with the current set that are due for completion. **Please note: we never delete baseline scores**, so in this example they would be presented with the baseline and the 6-month scores to fill out. Therefore, if you do not want the patient to fill out baseline scores, simply **manually delete** them by clicking the three lines next to the form.

If you want the patient to complete the scores on the same day you add them, rather than waiting overnight, you can do this by clicking the Send Email button. However you will need to review the due tasks and manually delete any that are not relevant as clearly the overnight deletion process will not have had a chance to run.

Now you need to **add the retrospective data**. In this case we are adding a procedure form for 01/11/20. Ensure you **choose the correct date** at the top of the form as this will default to today's date.

When you have saved this form, you will likely see some **future tasks** as well as **due tasks**, but this will depend on the dates you are working with.

They will all have due dates that are relevant to the procedure date – not today's date.

Gold ADMINISTRATOR REPORTS

EXAMPLE, Retrospective GENDER: Female BORN: 01 Jan 1988 (33y) SERIAL: CR00004316 NHS NUMBER: Unknown HOSP: Unknown CONSENTS TO CONTACT: No CONSENT STATUS: Consent Not Yet Recorded

No Email Address 1 Other Pathways

This patient has not consented to data collection but has not been anonymised Fix Now...

CLINICAL RECORD 55 ITEMS (11 OUTSTANDING)

CLINICAL SCORES OUTSTANDING SCORES DUE

PATIENT DETAIL PATHWAY DETAIL

LIST HISTORY

PATIENT PORTAL ATTACHMENTS GENERATE DOCUMENT

HIP (PRIMARY ARTHROPLASTY) PATHWAY [LEFT] PATHWAY ACTIVE

COVID Screening Clinical Assessments Treatment Complications Discharge from Hospital Outcomes

Ad Hoc Task

Lock All Unlock All Only Pathway Related Forms

Patient's Post-Op Tasks (7 items)

- 01 Nov 2020 Indications for Primary Arthroplasty Left Osteoarthritis of the Hip Secondary to Haemophilia
- 01 Nov 2020 Complexity Factors (Case-Mix Adjustment)
- 01 Nov 2020 Primary Arthroplasty Procedure Uncemented THR
- 01 Nov 2020 Discharge from Hospital
- 02 Nov 2020 Discharge from Hospital
- 01 May 2021 Patient Discharge from Treatment

FUTURE TASKS (42 items)

As with the baseline scores, you have three main options:

1. Wait for the overnight service to remove any irrelevant tasks and automatically send the patient those that are currently due and relevant.
2. If you have collected the scores on paper, you can input that data now.
3. Cleanup any unwanted/outdated tasks and send an email to the patient now.

The patient will be notified of future tasks when they become due for completion.