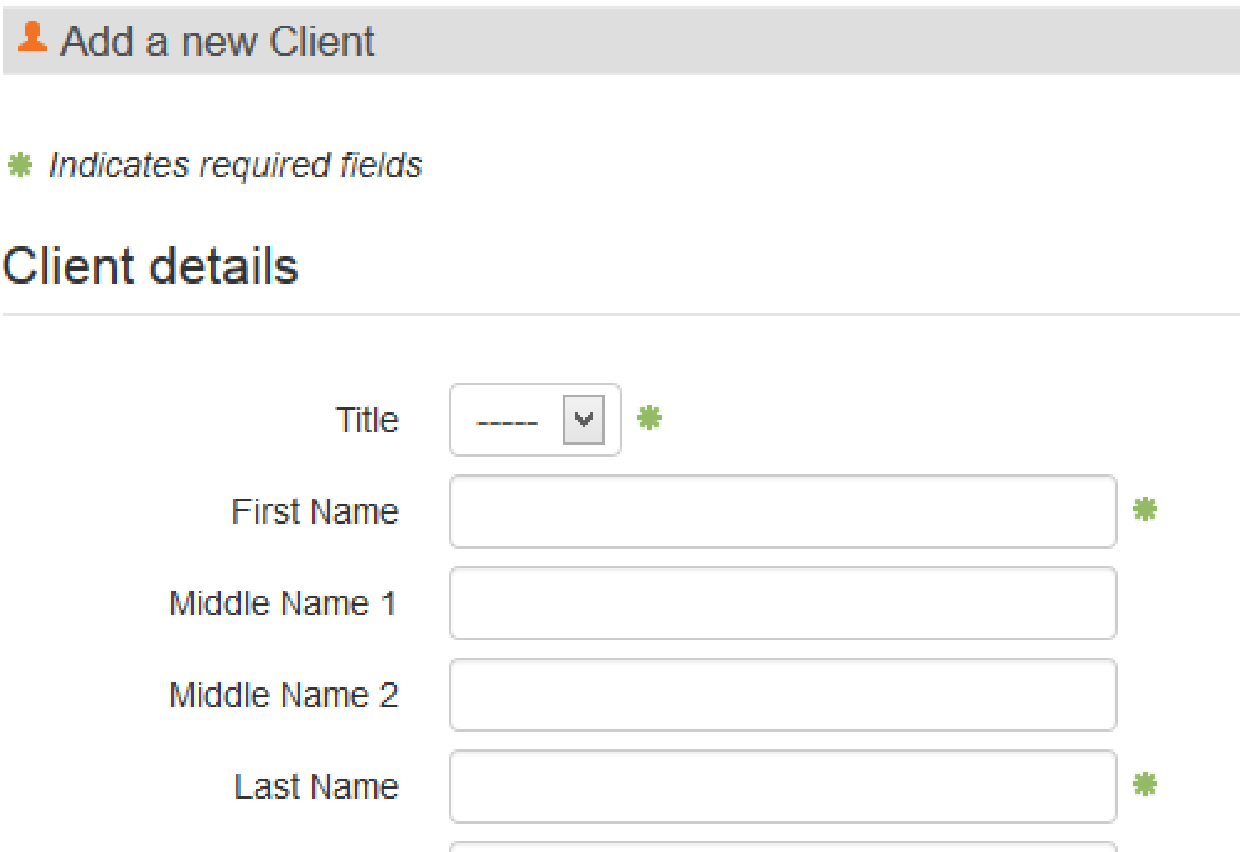
How to Bac-Pac

Adding a New Client.

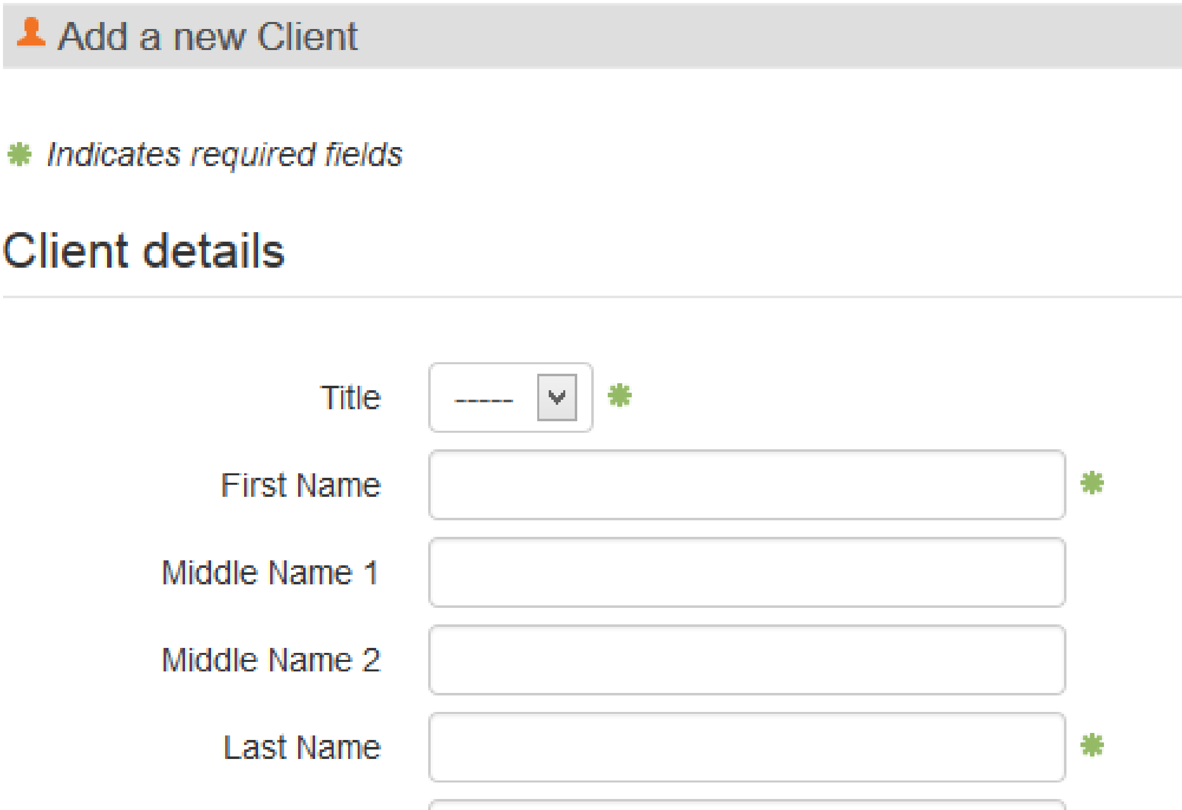
Adding a new client allows you to create their profile, add case and session information, store their personal data and keep up to date with their progress.

To add a new client, click on the 'Add a new client' option at the top of the bacpac screen. This opens up a blank template in the middle of your screen where you can add your new client's details. The template is split into different sections which contain text boxes so you can enter mandatory and optional data about your client.



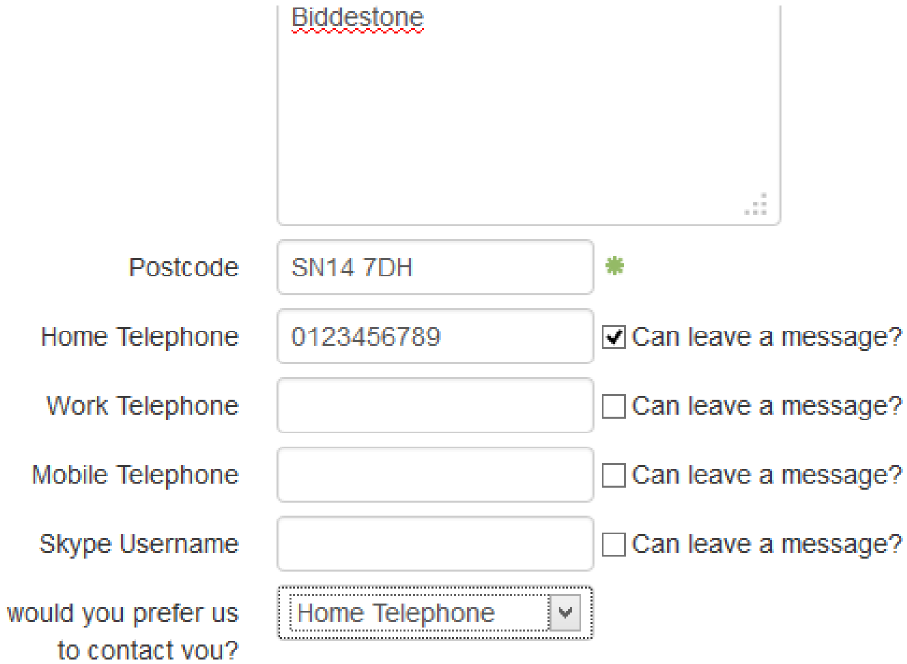
These sections are:
Client Details – Name, Gender and Date of Birth details, Client History.
Contact Details – Email, Address, Contact details and contact preferences.
Optional – Miscellaneous, Practice and GP, Next of Kin, Demographic and Service

information.

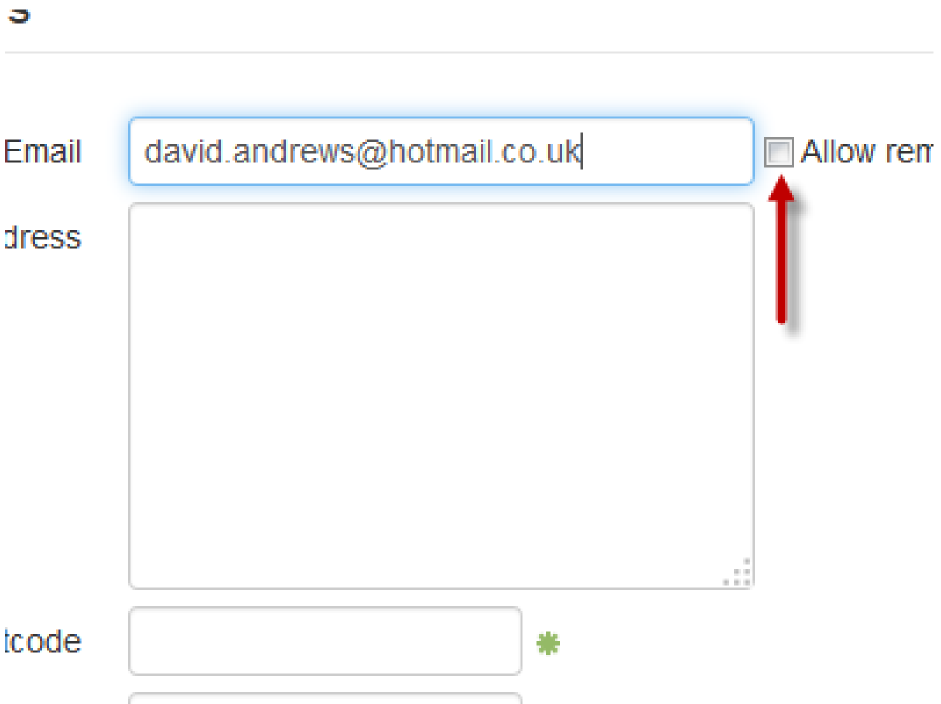


The small green arrows you will see at the end of a header will indicate that there is more information to **show** about this section. The green up arrow will **hide** the information in a section where present.

Enter the client's personal information. Within the Client Contact section is where you are able to add the client's email address, postal address and telephone numbers, this is where you can also ask if the client is happy for you to leave a message (simply click on the tick box to mark if they are happy for you to do this, as shown below).

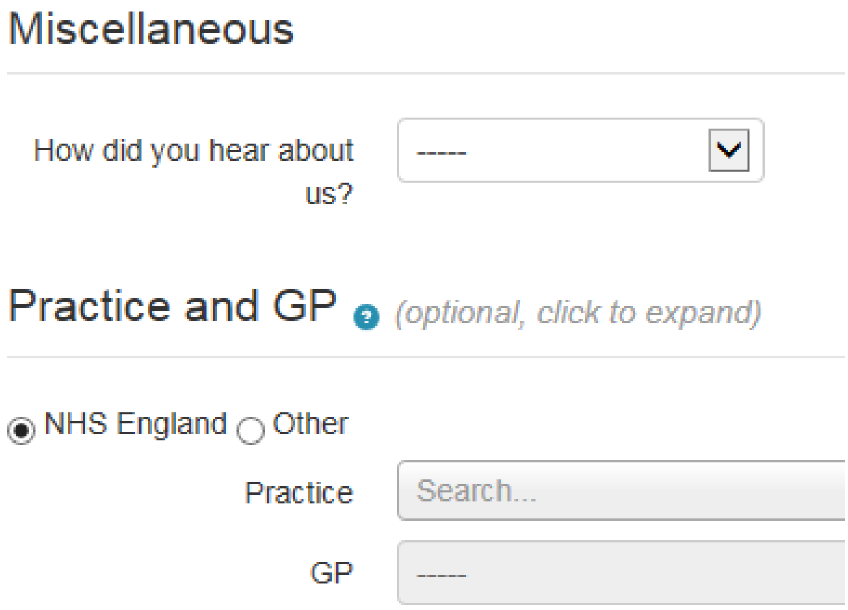


If you wish the client to receive appointment reminders via email, you will need to tick the box adjacent to the Email details (as below).



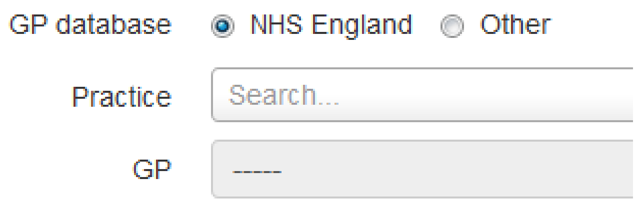
HINT – The Miscellaneous section is optional so you do not have to add anything here

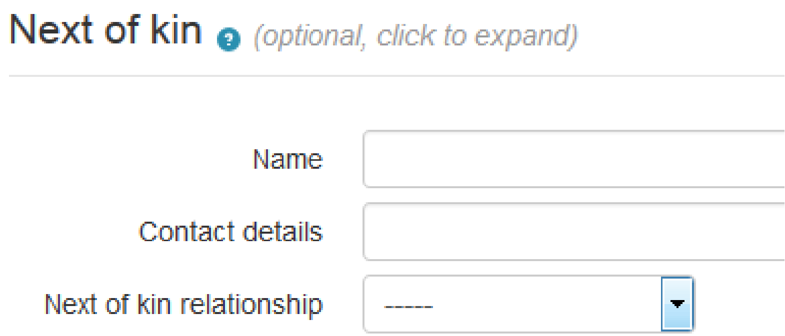
Miscellaneous – How did you hear about us?



HINT – The following sections are optional so you do not have to add anything here.

Practice and GP – Select NHS England or other GP database, search for practice and select GP from selected practice.



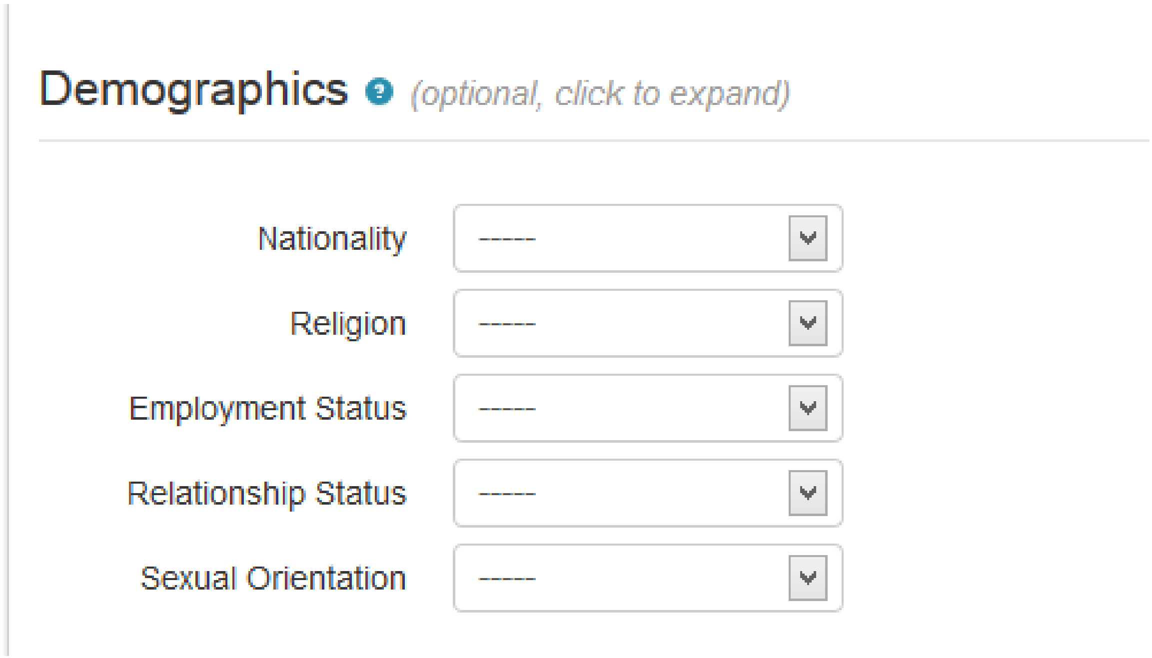


HINT- When searching for GP practice, type in at least 2 characters and a list of potential matches for your search will appear. Continuing typing and the list will decrease. You can then select the GP Practice you require.

Next of Kin – Name, Contact detail and relationship.

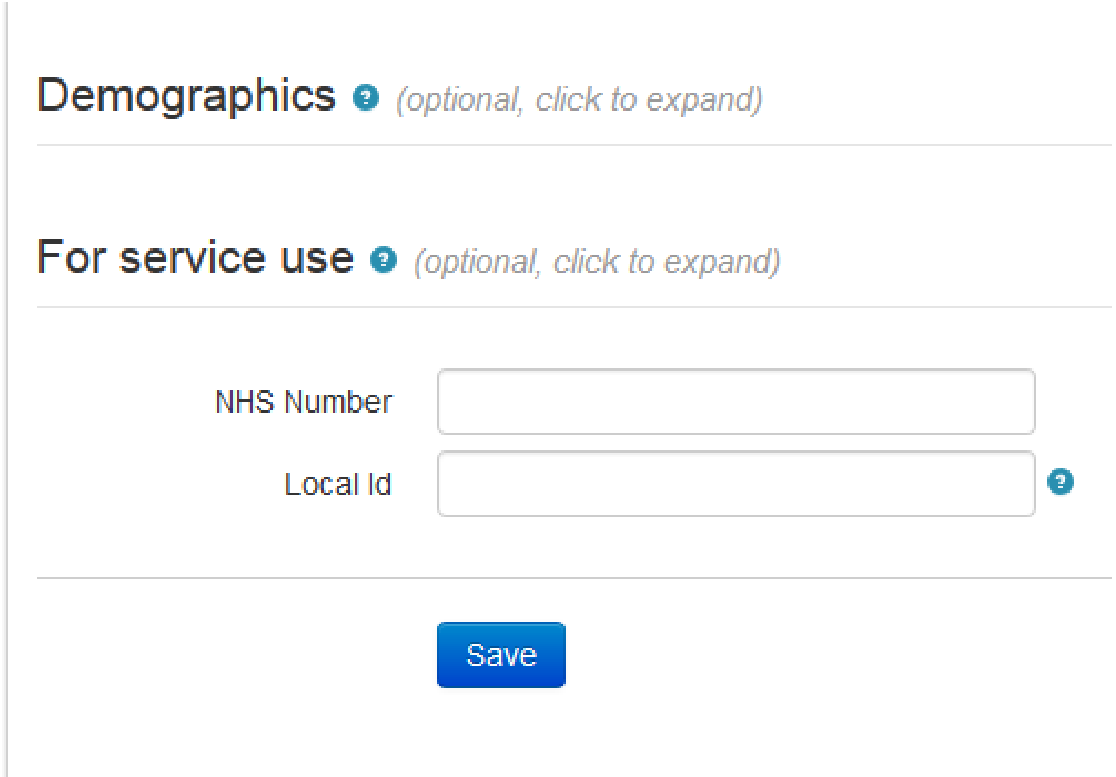
HINT – The following section is optional so you do not have to add anything here

Demographics – Nationality, Religion, Employment Status, Relationship Status and Sexual Orientation information can be added here. You can enter information into some, none or all of the fields displayed



You can enter information into some, none or all of the fields displayed

HINT – The following section is optional so you do not have to add anything here



For Service Use – NHS Number or Local ID number can be added here. The Local ID could be an identifier that you use in your own practice for billing or other purposes.

Once you have filled in all the relevant information for your new client press the blue save button at the bottom of the template

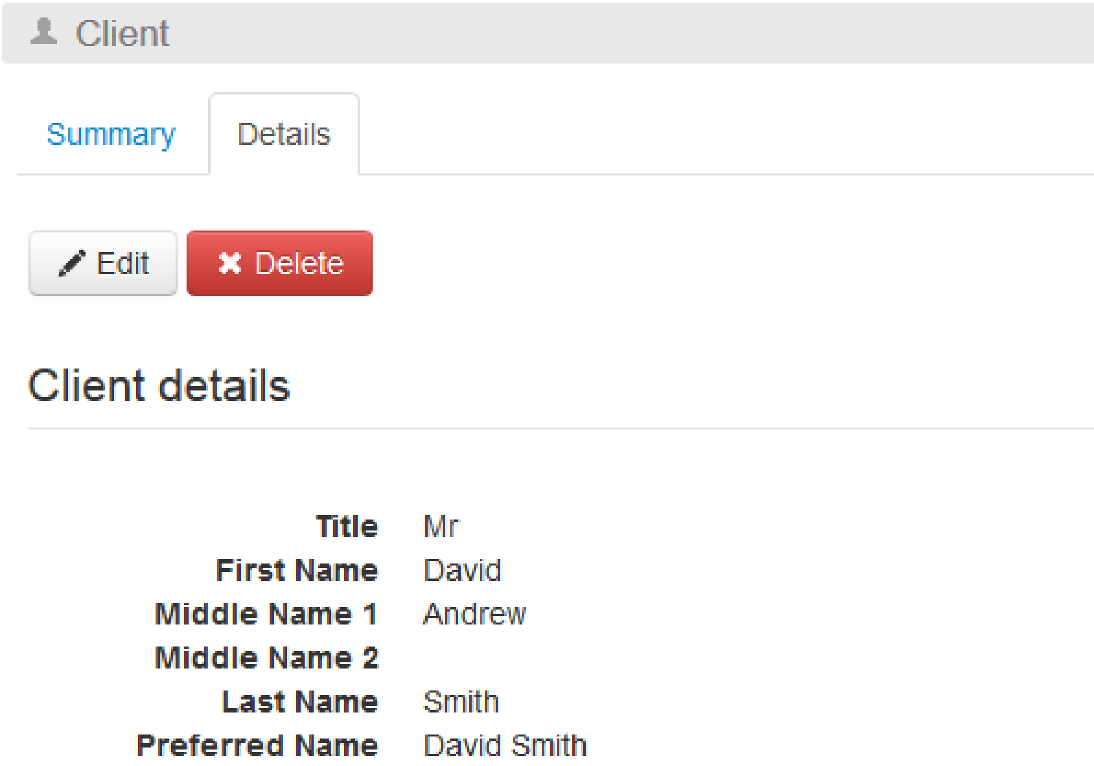
You will receive a notification if you have added an item which is not in the correct format. Once you have pressed save then the box around the item which has been filled in will go red, and a message will appear to the right hand side saying 'The input does not appear to be a….'

You have to correct these details and then press save again to be able to continue adding your new client onto the bacpac system

You have now added your new client onto the system. By doing this the system automatically creates a Client file for this client

All details you have added for the new client can be found in the grey header Client. Click anywhere along the client bar for the details to expand. Here you are able to view different sections of the client's profile.

Summary (which it defaults to automatically) – this shows key useful information about the client



Details – here is where all the information you have added about who the client is and how to contact them is stored. If you need to edit/update any of this information, simply click edit, amend the relevant details and then save.

Creating a New Contact.

To keep a full record of the client's progress you should create a contact for each time you plan to meet with your client. The contact you create then becomes the link to everything that happened in the session – attendance (or not), questionnaires, clinical and non-clinical notes and supporting documents are all dependent on a contact. You can have as many contacts within one case as is required to keep a full history of your client's progress.

To add a contact to a client, make sure that the client's details have been entered and saved, and that there has been a case created for that client. Now you can create a contact. Click on the blue plus (+)Contact option located on the client's timeline, underneath the Show/hide filters.

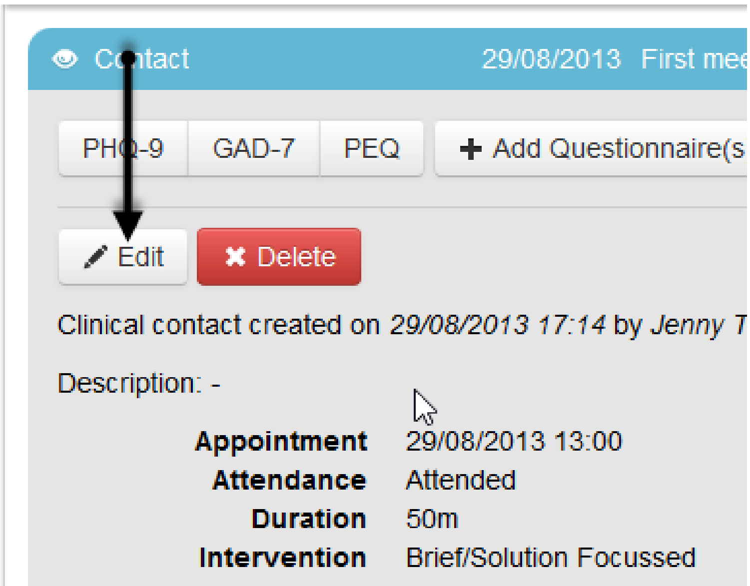
The contact form will appear in the middle of your screen for you to add the details of the contact. The appointment will appear with today's date and the current time. Change these using the up and down arrows. The contents of the drop down boxes for Intervention, Stage of Therapy, Contact Type, and Location are taken from the details you entered when you set up the system.

Complete the form by typing into the text boxes and selecting from the drop down options. Once you have filled in your contact form for the client, click the blue Save button at the bottom of the form, or click Cancel to go back to the client's timeline without saving the contact.

Tip: If you missed a value for any of these fields, a message prompting you to complete it will appear after you have clicked Save. The item you missed will be outlined in red. You will need to correct this before trying to Save button again.

Once you have saved the contact it should now appear on the client's timeline as a blue bar, showing that it is a Contact, and the date and headline of that contact.

To view the details of the contact, click on the blue bar and the details of the client will expand below.



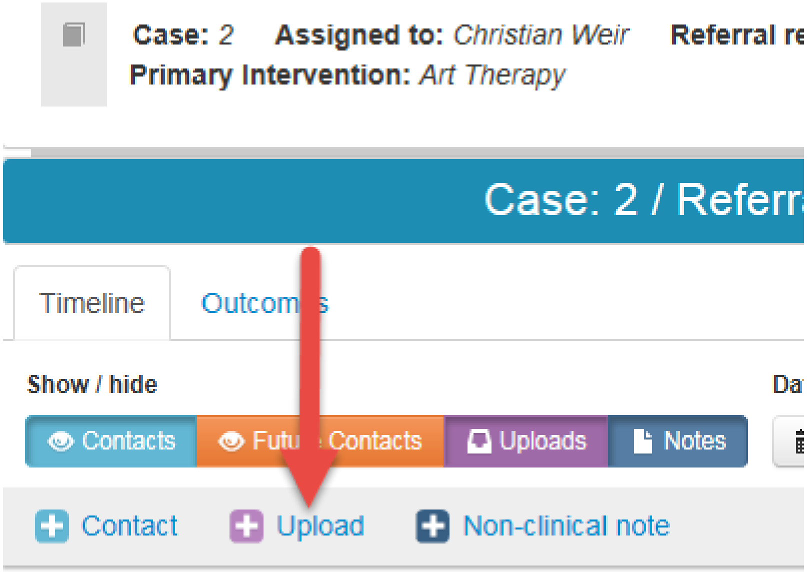
To edit the details of the contact, click the blue bar to expand the contact and view the details, then click the Edit button. The details will open in the contact form; make your changes and click the blue Save button to save your changes. To discard your changes and go back to the client's timeline, click the Cancel button.

To delete the contact, click the blue bar to expand the contact and view the details, then click the Delete button. A warning will appear to confirm that you want to remove the contact. Click OK to delete or cancel to keep the contact and go back to the timeline.

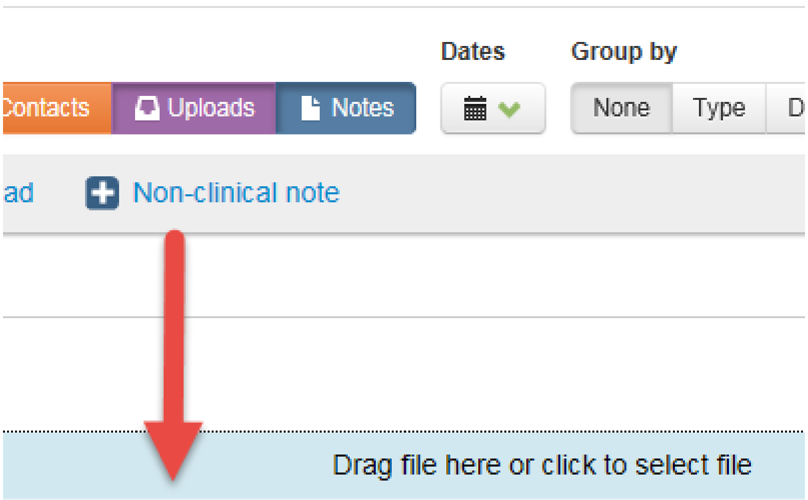
Uploading a Document.

Uploading a document is a very useful tool. Instead of having to write these out by hand, you can upload a doctor's note, hand written notes and prescriptions from your saved files. Using the upload function ensures that all documentation about a client can be held safely and securely, including scanned versions of paper based information where appropriate.

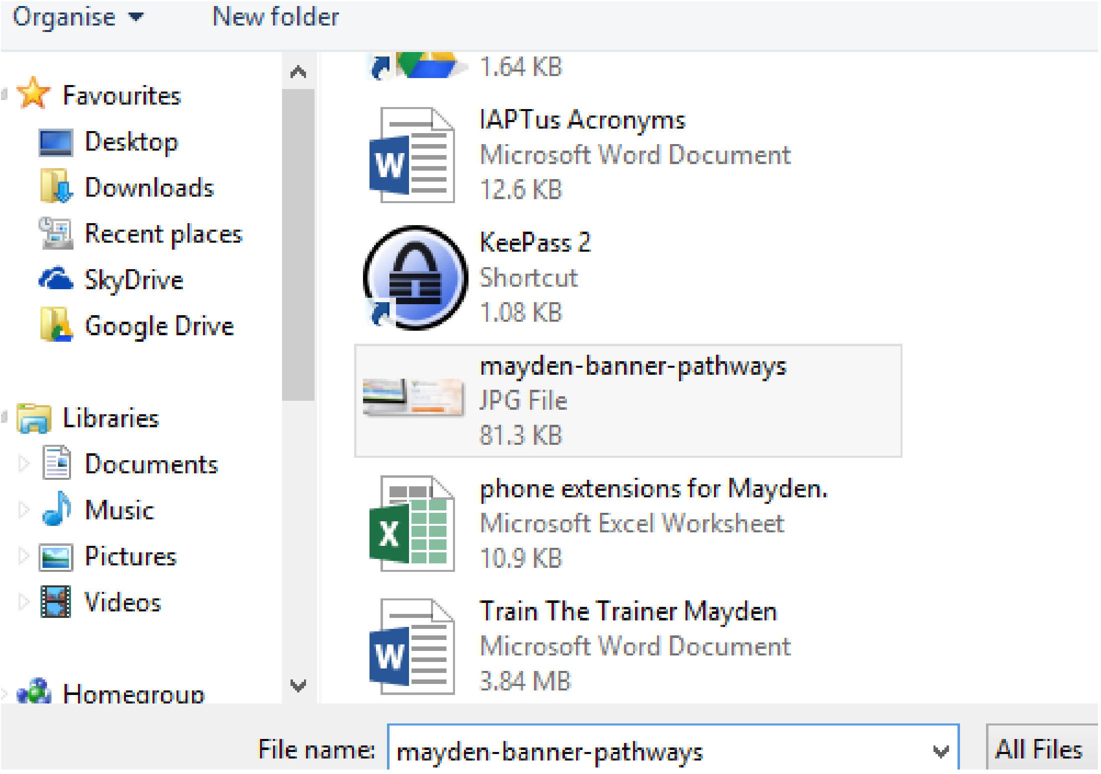
To upload a single new document to a client's record, click on the purple plus (+) Upload option located on the client's timeline, underneath the Show/hide filters.



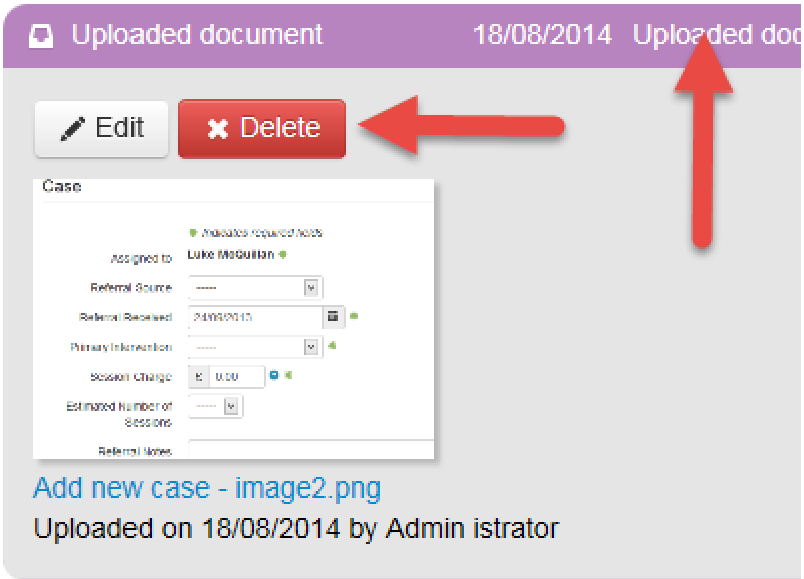
An upload section will appear directly underneath, click the blue bar ‘Drag file here or click to select file’.



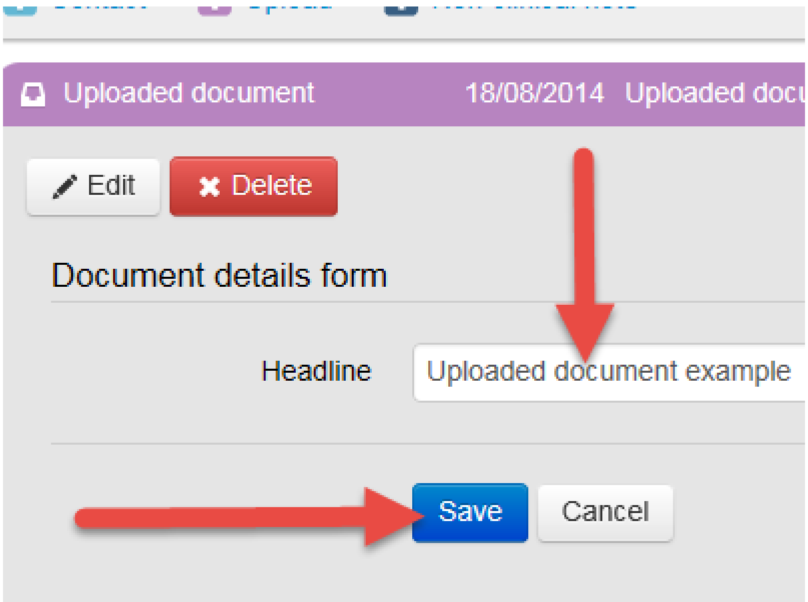
A window will open allowing you to browse through your files and folders to locate the document you want to upload to the client’s timeline. Click once on the document and then click the open button.



Once you have uploaded a document, a pink bar will appear with the file name and the date it was uploaded.



To Edit or Delete the uploaded document, click on the pink bar to view the document and click on the Edit or Delete button.

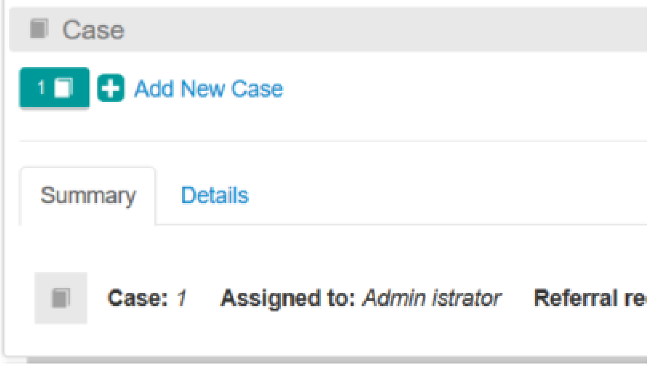


If you click the Edit button, a text box will appear, marked Headline, showing the name of the file in the text box. You can change this to give the document a different title. To action the amended file title, click the blue Save button located underneath the filename. To return without saving the amended file title, click the cancel button.

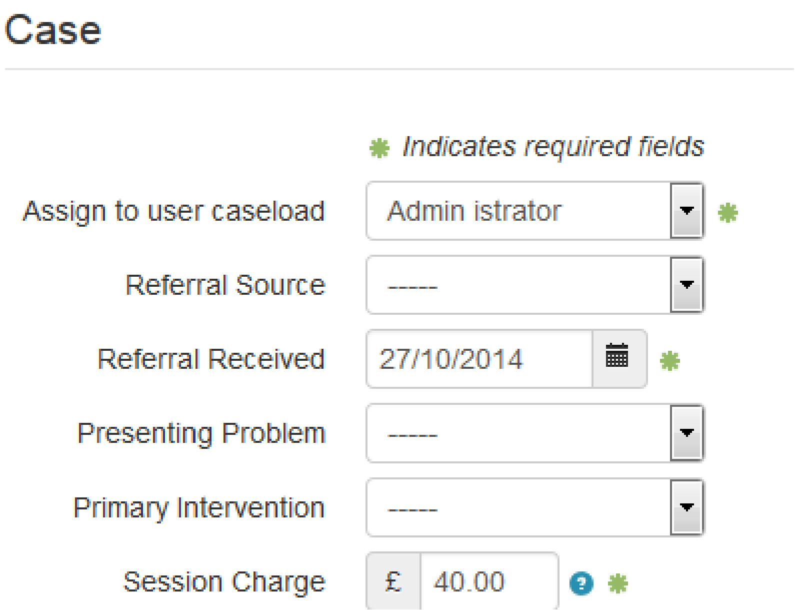
Adding a New Case

Cases are used to record each referral a client has with you. Rather than adding the client's details into the bacpac system each time they refer or re-refer, you simply add a new case to the client file – this not only saves time but also keeps data in one place making it neat and

tidy.
Check Client details each time a client re-refers just in case anything has changed since last time such as their mobile telephone number



To add a new case, you will need to be in the appropriate client file. Make sure you can see the "Add new Case" text. If this is not visible, click on the grey bar at the bottom of the Client Summary. It is possible to have more than one case – there will be a folder symbol on the left hand side below the grey Case bar, indicating other cases.

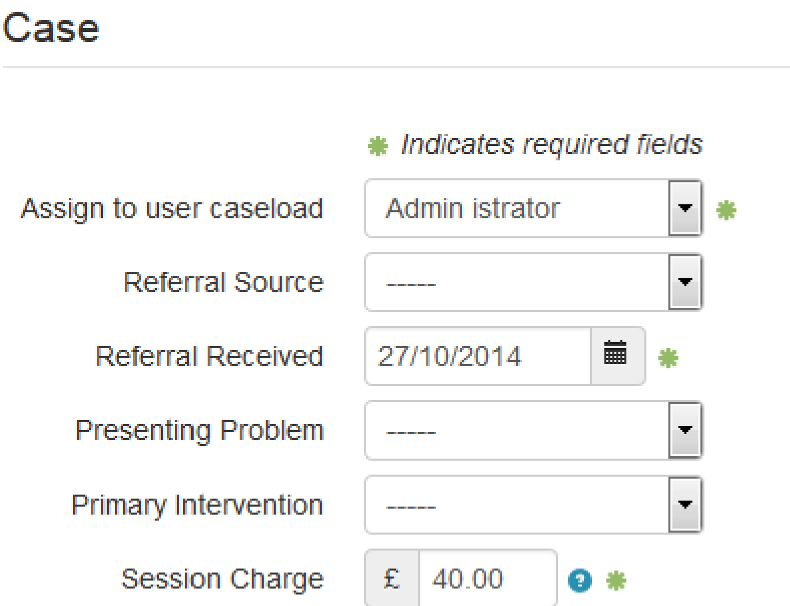


- If there is more than one therapist in your practice, select from the "Assigned to" drop down box.
- Fill in the referral source from the drop down options.
- The referral date will default to today's date. You can change this as required.
- The Presenting Problem and Primary Intervention is from the list you entered when you set up bacpac.
- Although you set up a standard session charge when you started using bacpac, you can change it here just for this particular case, your standard charge will remain as you originally set it.
- Enter the number of sessions you think this client might require using the drop down.

- This is where you will view details of the patient's history that has been entered in the Patient's details.

You can add some notes about the case referral, and a Referral Id if relevant.
Finally, you can choose to add the case straight to the caseload, by leaving the Waiting list tick box unchecked or, add the case to a waiting list by ticking the box.
Now click the Save button.

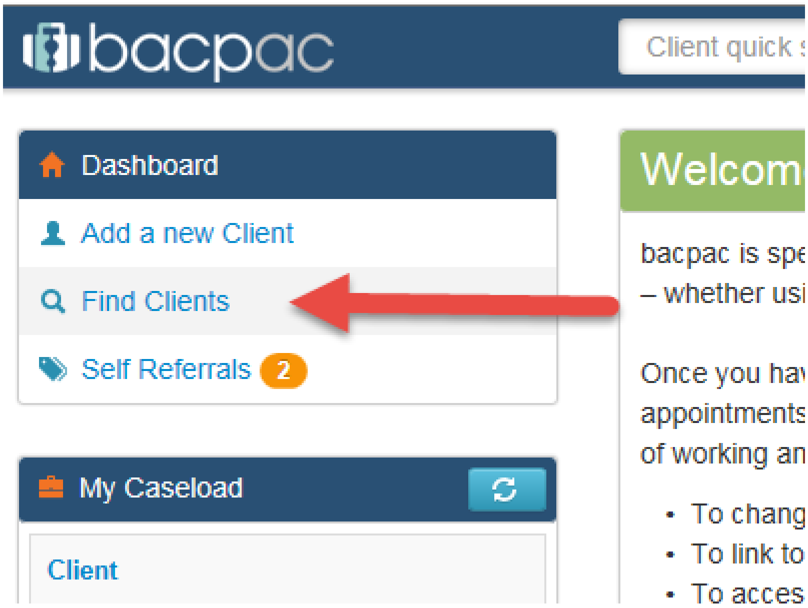
WARNING – the Assigned to and Primary Intervention fields must be filled in to be able to save this form.



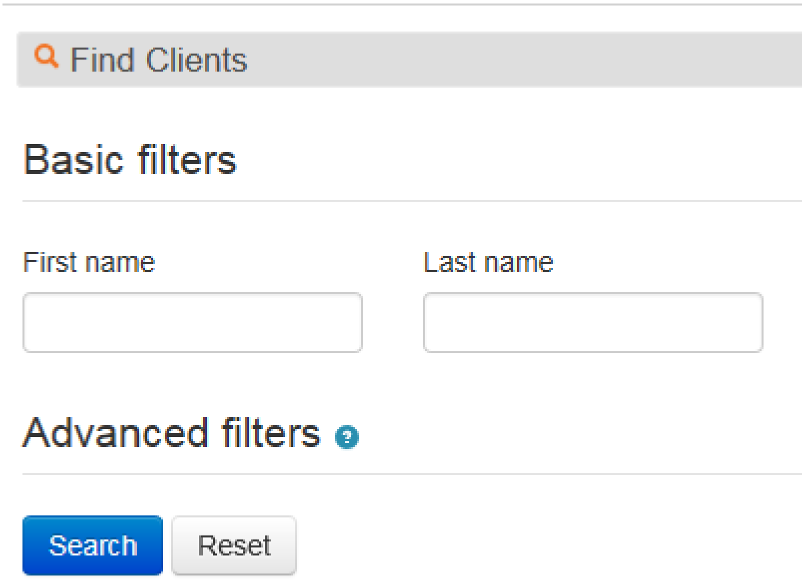
If a client has two or more cases linked to them. The most recent one is shown at the bottom. You can move between each case for the client by clicking on the case folder icons. Notice too, that you can access the client's details, and each case's details from this page should you want to change anything.

Finding a Client

This is a helpful tool when you need to locate a client, or groups of clients. Type in their Name, Date of Birth, Gender or any other information you may have saved against the Client Record.



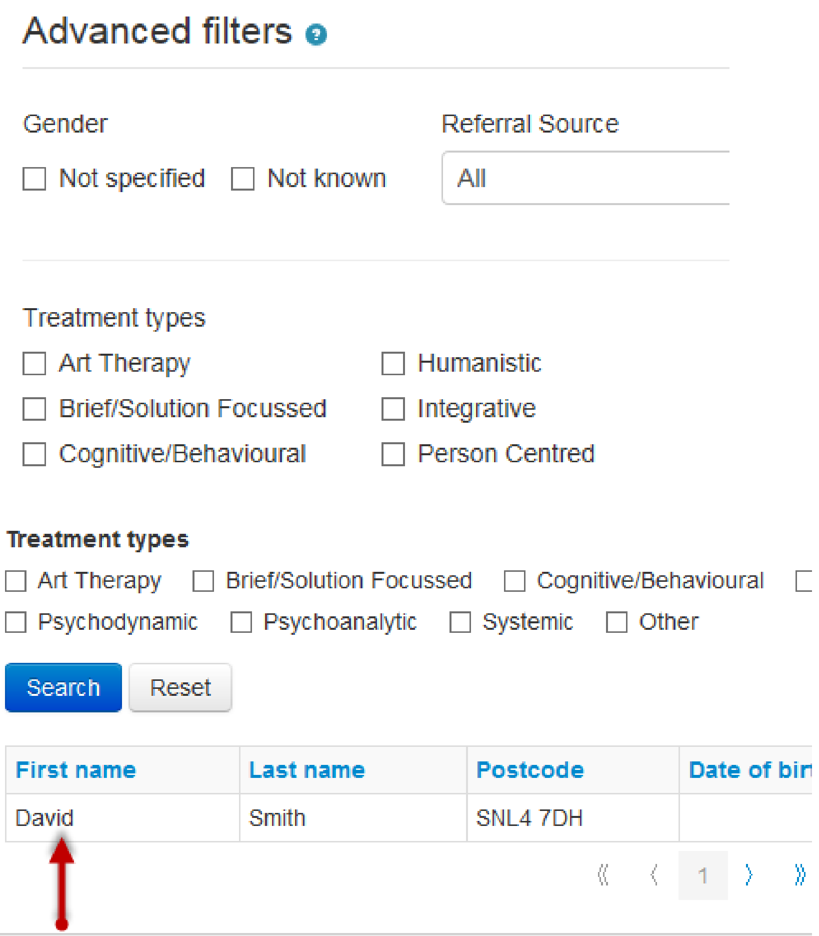
Click on the Find Client option within the Dashboard, this is located in the top left hand side of the screen. You will then be able to use the available filters to search for the client. These include First name, Last name, Date of Birth, Gender, On waiting list? Etc.



TIP – If you want to reset the criteria that you have entered and start again, press the grey Reset button, this will clear the page and allow you to start again.

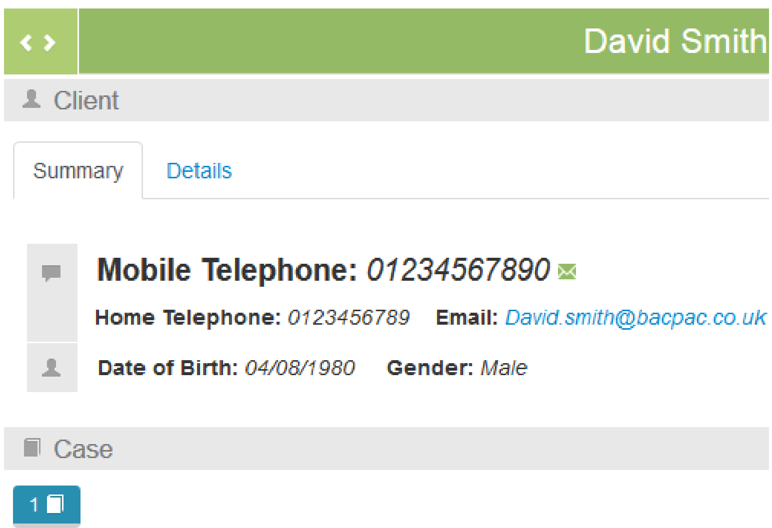
It is possible to search on more advanced filters. Click on the Advanced filters. This will allow you to search on advanced Gender options and Treatment types.

TIP-If you want to reset the criteria that you have entered and start again, press the grey Reset button, this will clear the page and allow you to start again.



Once you have filled in the criteria press the Search button and all the clients that match your criteria will appear below.

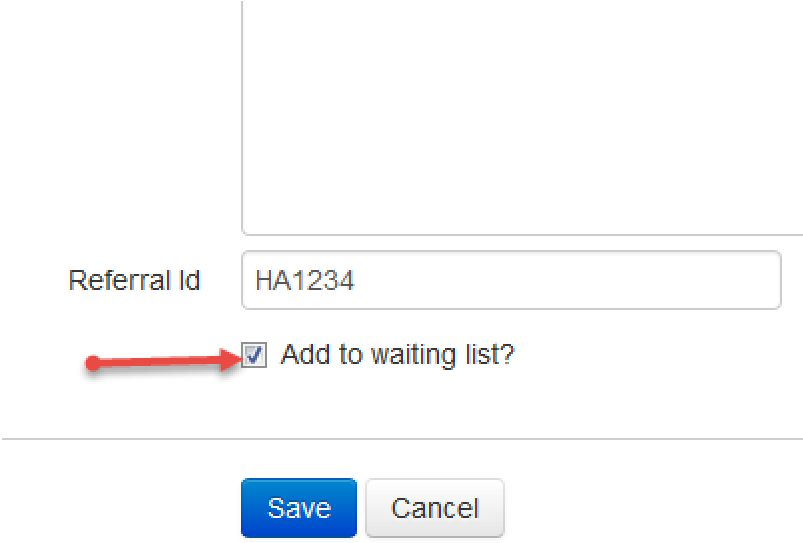
Select the client you want by simply clicking on any of that client's information.



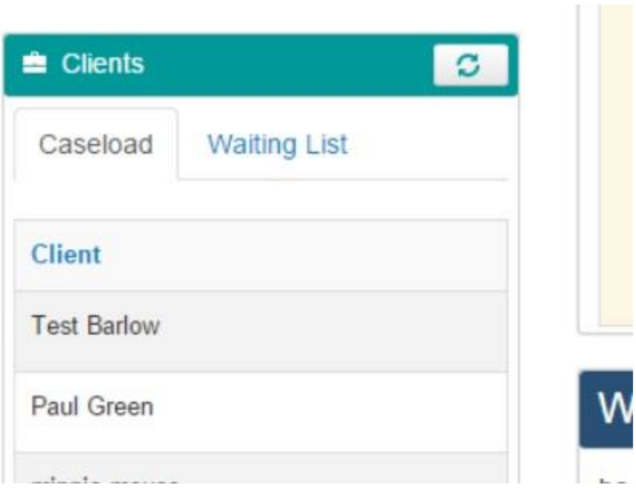
Once you have clicked on the client you are looking for, you will be able to see to their profile.

Waiting List

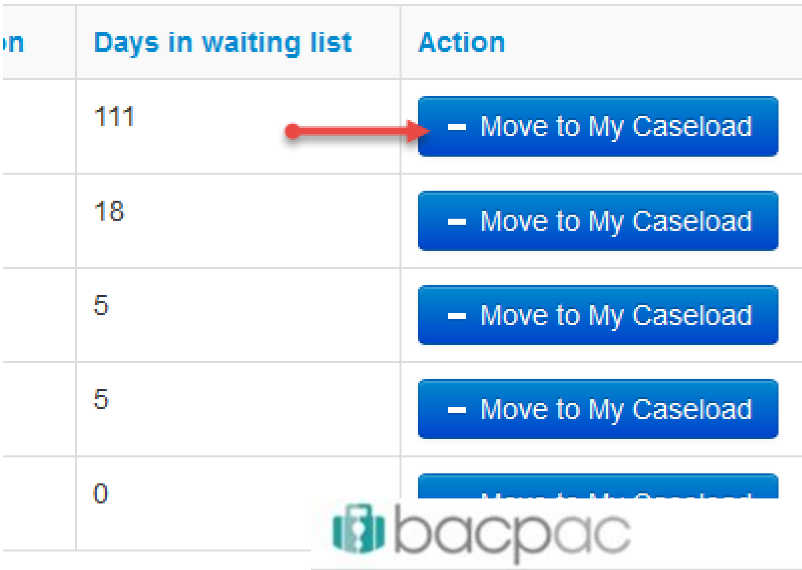
bacpac offers a waiting list option so you can separate your current caseload from clients you are waiting to see.



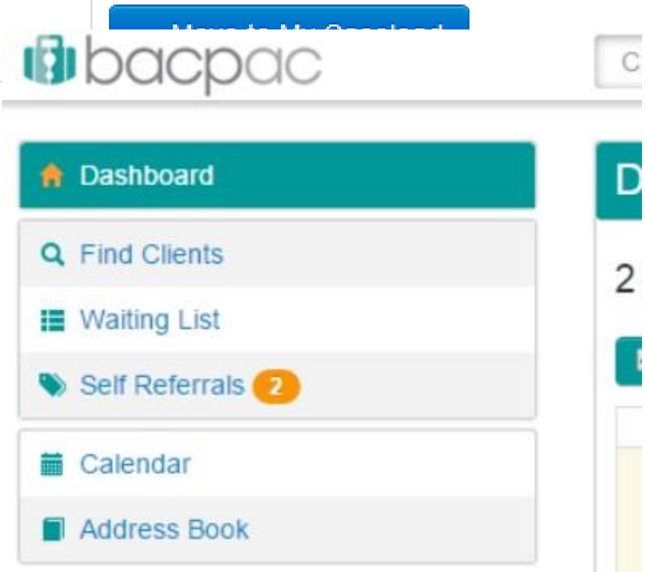
When adding a new case to an existing Client, there is a Waiting List tick box just above the Save button. By ticking the box, the case for the client will be put into a waiting list. Leaving the box un-ticked will put the case onto the caseload for the allocated therapist.

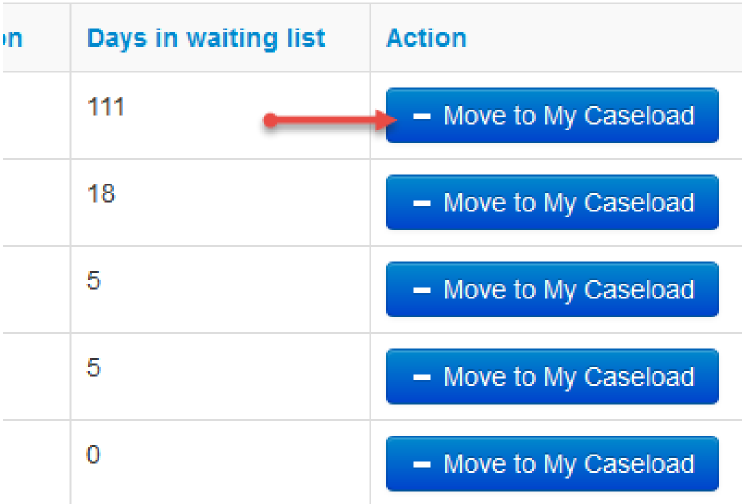


You can see who is currently in the waiting list by clicking on Waiting List in the side Menu Bar.



To manage your waiting list, click on Waiting List from the Menu bar. The details of the existing cases on the waiting list will be displayed with an option to move to caseload





To move a case from a caseload to the waiting list, use the search option to locate the client and select. Click on the “plus” sign.