

Apex (Pathology)

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IT TRAINING has made every effort to ensure that the material in this manual was correct at the time of publication but cannot be held responsible for any errors or inaccuracies. IT TRAINING reserves the right to change or replace information contained in the manual without notice. For the most up to date version please refer to the IT Training website. All references made to patient records are fictitious for the purpose of training only.

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Pathology System Course

1. GENERAL COURSE INFORMATION

Course Title	APEX - PATHOLOGY
Method of Training	Workshop or E-Learning
Length of Course	1 hour
Pre-Requisites	None, although Keyboard Skills advisable.

Course Description:

The Pathology Record holds general demographic details about a patient and provides results of any pathology samples, occurring at hospitals within the Portsmouth/IoW area and connected on lying services/areas, (e.g. GPs).

Target Group:

All Staff - Clerical & Clinical

Course Content:

This course will enable the student to:

1. Display knowledge of the structure of the Pathology system.
2. Display knowledge of their personal responsibilities for Data Protection and the Caldicott Principles.
3. Log on and off of the APEX system.
4. Find a patient with and without a Case note number.
5. Use the menu options.
6. Identify specific information, particularly results outside of the normal range.
7. Select specific test results.
8. Move between different results.
9. Select and print results

2. INFORMATION GOVERNANCE

Information Governance (IG) sits alongside the other governance initiatives of clinical, research and corporate governance. **Information Governance is to do with the way the NHS handles information about patients/clients and employees, in particular, personal and sensitive information.** It provides a framework to bring together all of the requirements, standards and best practice that apply to the handling of personal information.

Information Governance includes the following standards and requirements:

- Information Quality Assurance
- NHS Codes of Conduct:
 - Confidentiality
 - Records Management
 - Information Security
- The Data Protection Act (1998)
- The Freedom of Information Act (2000)
- Caldicott Report (1997)

Further information can be accessed through the Trust Intranet:

Information Governance (Departments sections), and
Management Policies (Policies section)

2.1. What can you do to make Information Governance a success?

2.1.1. **Keep personal information secure**

Ensure confidential information is not unlawfully or inappropriately accessed. Comply with the Trust IT Security Policy, Confidentiality Code of Conduct and other IG policies. There are basic best practices, such as:

- Do not share your password with others
- Ensure you "log out" once you have finished using the computer
- Do not leave manual records unattended
- Lock rooms and cupboards where personal information is stored
- Ensure information is exchanged in a secure way (e.g. encrypted e-mails, secure postal or fax methods)

2.1.2. **Keep personal information confidential**

Only disclose personal information to those who legitimately need to know to carry out their role. Do not discuss personal information about your patients/clients/staff in corridors, lifts or the canteen or other public or non-private areas.

2.1.3. **Ensure that the information you use is obtained fairly**

Inform patients/clients of the reason their information is being collected. Organisational compliance with the Data Protection Act depends on employees acting in accordance with the law. The Act states information is obtained lawfully and fairly if individuals are informed of the reason their information is required, what will generally be done with that information and who the information is likely to be shared with.

2.1.4. **Make sure the information you use is accurate**

Check personal information with the patient. Information quality is an important part of IG. There is little point putting procedures in place to protect personal information if the information is inaccurate.

2.1.5. Only use information for the purpose for which it was given

Use the information in an ethical way. Personal information which was given for one purpose e.g. hospital treatment, should not be used for a totally separate purpose e.g. research, unless the patient consents to the new purpose.

2.1.6. Share personal information appropriately and lawfully

Obtain patient consent before sharing their information with others e.g. referral to another agency such as, social services.

2.1.7. Comply with the law

The Trust has policies and procedures in place which comply with the law and do not breach patient/client rights. If you comply with these policies and procedures you are unlikely to break the law.

For further Information Governance training refer to:

<http://www.igte-learning.connectingforhealth.nhs.uk/igte/index.cfm>

Written by PHT Information Governance Manager, Sept 2010

3. SECURITY

Please ensure that you read the Data Protection Act.

It is essential that you **DO NOT** share your password or allow others access to the system using your account. **IF YOU DO YOU ARE LIABLE FOR DISCIPLINARY ACTION AND POSSIBLE DISMISSAL.**

It is essential that you log yourself out when you have completed your task. If you leave the system logged on and unattended this could breach patient confidentiality and possible unauthorised usage. Although the system automatically logs out (exits) after a few minutes of non-use it is still your responsibility to close your account.

4. USERNAME AND PASSWORDS

USERNAME

If you do not have a username then you will be issued with one after the successful completion of the course. Details of your username will be sent to you by the IT Service Desk.

If you have a username for email, PAS, etc. already then, in most cases, you will use the same one for Apex.

PASSWORD

Your password must be between 6 and 12 characters (containing at least one letter of the alphabet and no more than two repeated characters and you can include a number).

Passwords automatically expire after 90 days. In the Apex Pathology System you have the functionality to change your password at any time but you must change your password at least one day before it expires.

If you do not re-new your password BEFORE it expires, when you next attempt to access APEX you will find that your account has been 'disabled'. If this happens please contact the SERVICE DESK ([see page 13](#)). If you are likely to be absent when your password expires it is advisable to change your password before the expiry date by selecting option 2 – 'UPASS Change of Password' from 'Ward Enquiry Menu'.

You may alternate between passwords, but it is possible to use a wider selection if preferred.

5. THE PATHOLOGY SYSTEM

The Pathology system is designed to look up patient results relating to the following disciplines:

- Biochemistry
- Microbiology
- Cellular Pathology
- Blood Transfusion
- Haematology.

5.1. Discipline Codes

B – Biochemistry H – Haematology M - Microbiology
T – Transfusion C - Cellular Pathology including Cytology

If you know what type of test your patient has had then you can specify using the initial of the discipline code. You can select up to 3 at one time.

6. USEFUL FUNCTION KEYS

- F7 - Short Help, message appears at the bottom of the page
- F8 - Long Help, this will give you a detailed description of what is required
- F9 - Refresh Screen (Press <return> on Refresh screen to exit)
- F10 - Quick Access to Action Bar/Quick Return

7. COMPLETING MANUAL TEST RESULTS REQUEST FORMS

Please remember to write the patient's Case note number on the request form. The laboratory can then input this number onto the Pathology system when entering results. This will help you when making a result enquiry.

If you do not do this then a Pathology number may be recorded against the result, in addition to any results recorded under the Case note number.

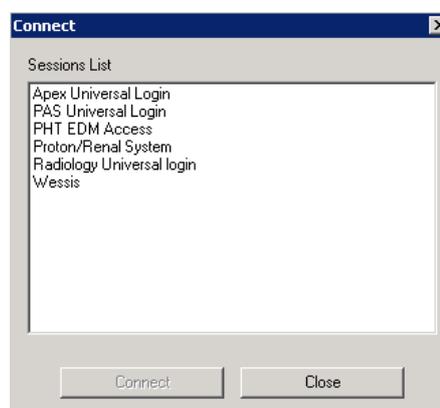
8. HOW TO ACCESS APEX PATHOLOGY

Across the Trusts there are a number of possible methods to accessing APEX Pathology. The method you need to use may depend on: where you are based, the age of your computer equipment and the way your computer was set up when it was issued. It is best to ask a colleague for the method for your computer.

8.1. Desktop Short Cuts

A Desktop short cut is the easiest way to access APEX. Double click on the appropriate icon on your desktop.

The **Powerterm** icon will offer you a menu from which to select **APEX Universal Login**. Click on your choice and then click on the **Connect** button.

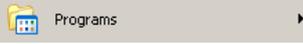


The **APEX** icon will take you straight to the log in prompt for the system.



8.2. The Start Menu

Click on the **Start** button () at the bottom left of your screen.

Click on **Programs/All Programs** ().

A sub menu will appear. Click on **Powerterm**, or **Smart Term Essential**, or **Smart Term Hosts**, or **Kea**; whichever is available.

Further sub menus may appear. Click on the relevant options until you get to the system you require.

8.3. Internet Explorer

1. Open **Internet Explorer** (). (Where is this? – you may have a Desktop icon, find it in the Start Button menus).
2. Click in the Address Bar and type in `http://powerterm`.
3. Click on the Go button.
4. (If asked, say Yes to the ActiveX control message.)
5. Wait for the screen to load with the menu.
6. Select APEX Universal Login and Connect.

8.4. Initial Log On – Caps Lock Off

1. At **Login** enter **apex (must be in lowercase)**.

```
Compaq Tru64 UNIX V5.1R (Rev. 1885) (pimsstatic.porthosp.swest.nhs.uk) (pts/108)
login: apex
```

2. If your computer is not registered with the Pathology Department you will see the following prompt at the bottom of this screen:

Please enter Terminal ID (Answerback):

You must get your PC registered with the Pathology IT Office to avoid this. **Contact them on 02392 9228 6470.**

In the meantime, to allow you to access the system you may enter the following code:

ZLN - your Caps Lock must be switched on.

3. At **Username** enter your personal username.
4. At **Password** enter the password provided by the IT Service Desk.

```
QAH
Username : PIKEJ
Password :
```

BE CAREFUL!

The terminal will '**Lock**' if you fail to log on after **5** attempts at entering your password. Your password will also be disabled.

9. TO MAKE AN ENQUIRY – FINDING RESULTS

9.1. How to find a patient using a case note number

1. Select '**1 – WENQ**', press <return>
2. **If the patient's case note number is known** it can be entered into the '**Patient Number**' field. You then, only need to type in the first 2 letters of the patient's surname. If you type in the incorrect surname the system will confirm the name of the patient connected to the case note number by identifying this at the bottom of the screen. When correct patient identified go to step 3.

```
Ward Enquiry

Patient Number : WH1212
or New NHS Number :
Surname (2 Chrs): █
Forename :

DOB/Age :

Sex :

Location :
Consultant :

From date :

Discipline :

1 Accept 2 select Spec 3 Reject 4 taBulated enq 5 eXit A
```

3. The cursor will be sitting on the '**From Date**' field, which will contain the current date, change the date if necessary. If you leave the '**From Date**' at the current date you will be taken to the most recent result for the patient.
 - a. If you wish to display results for all disciplines press **F10** to move to the bottom of the screen and press <return> on the 'A' prompt, to accept the patient's details. Results from all disciplines will then be displayed.
 - b. If you wish to display results for a specific discipline, enter the required discipline code, as specified on [page 5](#), e.g. B – Biochemistry and press <return> (Up to three may be specified).

9.2. How to find a patient without a case note number

1. **If the patient's case note number is not known** type **U** (for Unknown) in the '**Patient Number**' field and press <return>. The screen will then change to the '**Patient Search Screen**' enabling the inputting of patient details. Enter any relevant details you have on your patient. Surname, Soundex search (can this surname be spelt in any other way, enter Y for yes if you feel it could be). **Synonym Search** is not switched on in the live system. At Forename enter only the initial and this will give you more options particularly if a name can be spelt in different ways. If you know the DOB enter it as six digits e.g. 070750 or you can enter the age. After entering the information to be searched on, you can bypass the other fields by pressing the **F10** key to quickly access the '**A**' to 'Accept' located at the bottom of the screen.

Press <return> to accept the '**A**' prompt search criteria.

2. Select your patient from the list displayed by using the arrow keys. Cursor up or down until the selection bar rests over your patient. At this point you will be informed if your patient has an

```

Patient Search

Patient Number : U
New NHS Number :
Old NHS Number :
Service Number :

Surname : DUSTBIN
Previous Surname :
Soundex Search (Y/N) : Y
Synonym Search (Y/N) :
Forename : U

DoB/Age : U
Extd Age Search (Y/N) :
Sex :

Location :
Consultant :

1 Accept 2 Reject 3 Change 4 New patient 5 Swap 6 eXit
UNKNOWN
  
```

alias number, (remember this would occur if you do not put the original number on the manual pathology form). You can either press **F10** to accept the selected patient, or press <return> twice to confirm acceptance. When correct patient identified go back to step 3, as described on the previous page.

9.2.1. The initial screen

When viewing the Apex screen it is important to look all around the screen for the information.

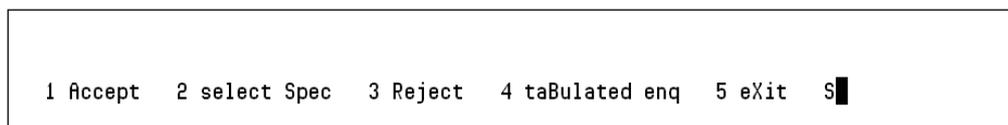
At the top right hand side of the result is the date of the specimen. The screen will show you to <Page up> for earlier samples or <Page down> to return to more recent results, if there are any more to view.

Some results cover more than one screen, use your <cursor down> and then you will get a prompt at the bottom of the screen to tell you "no more data" or <cursor up/down> for more. Sometimes people call <cursor keys>, directional arrow keys.

To exit this patient press <return> on the x prompt located on the toolbar.

10. WARD ENQUIRY OPTIONS

1. You also have some other **options** at the bottom of the **ward enquiry screen**. If you wish to reject the data already entered select 3 or R. If you wish to exit this screen select 5 or X.



Another option that is particularly useful is to **select specimen**.

Select Specimen – this allows you to select specific test results from a screen identified as either being available, in progress or requested.

1. From the **'Ward Enquiry'** screen select option 2 or S from the toolbar located at the bottom of the screen and press <return>

2. You will be presented with the following message:

Warning – compiling index make take a while –continue (Y/N) – press <return>

3. You will be presented with a list of all the tests carried out on your patient.

The next screen will give you information on Specimen number, date/time and type of test taken by the patient. The right hand column will inform you whether a test is -

- **Avlbl**
- **In Progress**
- **Requested**

Ward Enquiry

Patient Number : WH1212
or New NHS Number :
Surname : TRYOUT
Forename : TOMMY

Specimens

BB200002B	28/07/00 13:40	Lipids	Avlbl
BB222221W	28/07/00 13:40	Cholesterol,Glucose,Triglyceri	Avlbl
BB200000M	28/07/00 13:39	Lipids,Glucose,Glucose	In Progress
BB111110E	28/07/00 12:02	Cholesterol,Glucose	In Progress
BB111111H	28/07/00 11:50	Glucose	Avlbl
BB111112W	28/07/00 11:46	Glucose	Avlbl
BB111115F	19/07/00 13:31	Delayed U/E	Avlbl
BB111114A	19/07/00 13:26	Delayed U/E	In Progress
BB111113P	19/07/00 13:12	Delayed U/E	Avlbl
HQ456789E	19/07/00 09:48	HB	Avlbl
BB111112W	18/07/00 09:32	U/E	Avlbl

1 Accept 2 select Spec 3 Reject 4 taBulated enq 5 eXit S
Compiling index ... please wait

4. You can view the result of tests that are available, (Avlbl) highlight your required test using the <cursor> or 'down arrow' key and press <return>.

5. The selected test will be presented on screen. If you wish to select another test from the specimen screen, press return until the specimen screen appears again and then arrow down to another test and press return.

6. When you have finished with this option, **remember** to change your option to 3 to reject the patient or 5 to exit.

11. TOOLBAR OPTIONS

Toolbar options within **Result Screen:**

WH1212	TRYOUT, TOMMY	01/03/1981	LABQ	TC
Clinical Info:		Sex: M	Tel:	
Specimen No : BB200002B (Biochemistry)		Date Collected: 28/07/2000		
		<PgUp> for earlier samples		
BB200002B	28/07/2000	13:40	Serum	
Cholesterol		5.20	mmol/L	Auth
Triglyceride		1.23	mmol/L	(0.70 to 2.10) Auth
<hr/> 1 Date 2 Earlst 3 Latst 4 rep seQ 5 Spec 6 DFT 7 Matches 8 Options 9 eXit X				

- 1 - Date:** If you are looking for results for specific dates, on selection of this option a specimen date box will appear in the bottom right hand corner. Type in the date of the required test and press <return>. The result for this date will be displayed.
- 2 - Earliest:** Will find the earliest result available.
- 3 - Latest:** Will find the most recent result.
- 4 - rep seQ:** Cellular Pathology only. Enables you to view a sequence of connected tests i.e. Smears for Gynaecology and Patch tests for Dermatology. Selecting this option will not give you any extra information.
- 5 - Specimen:** This displays information completed on the manual request form and details of the Pathology Laboratory processes.
- 6 - DFT:** Dynamic Function Test. If your patient has had a series of tests performed for investigation on the same day e.g. . Glucose Tolerance Test. Selection of this option will allow you to view the results for the whole day on one table. You will be offered a comment option e.g. **1. Comments**. On selection of this you will view any comments reported here by the Pathology staff on individual results.
- 7 - Matches:** Will take you back to the Index of patients Search Screen; (but this can only used when doing an unknown number search).
- 8 - Options:** Select No. 2 or **U** = Cumulative (to view all results)
 If monitoring a patient across a series of tests e.g. glucose levels, select a test that reports this. Results will be brought through into the '**Cumulative Screen**' containing dates and times of tests. You will be able to see the results as a table.

If you wish to produce a graph, use the **'tab'** key (above Caps Lock key, on the left side of the keyboard), to move to the date you wish to graph and select option **'2 Graph'**. At **'Select Test to Graph:'** type in a code e.g. GL for glucose in capital letters. A graph will now display.

9 - eXit: X Will take you back to the search screen to find another patient.

12. PRINTING

Choose file, print from the toolbar to make sure that your results print to the correct printer otherwise this could be a breach of security if your results are printed elsewhere and picked up by an unauthorised person.

If your result covers more than one screen then you will have to move, cursor up/down to each individual screen to print.

Not all terminals are set up to print results as this needs to be achieved by use of a special set-up. If you cannot print from your terminal but feel it is essential to do so please contact the Service desk ([see Fault Reporting section on page 13](#)).

13. REFRESHING YOUR SKILLS

If you wish to have a refresher course regarding Apex, you can log on to the IPHIS training website on <http://www.porthosp.nhs.uk/it-training> and select E-Learning from the Training link on the left hand menu. This will allow you to select an Apex turbo demo where you can be prompted through step by step.

For a list of glossary of terminology and jargon buster of abbreviations please refer to the IPHIS training Website on <http://www.porthosp.nhs.uk/it-training>

14. FAULT REPORTING

From time to time you may experience problems with faulty equipment, software problems or access to the Apex Pathology system ie password non acceptance problems. To resolve your problem a call with need to be logged with the IT Service Desk.

14.1. IT Service Desk

Email	it.servicedesk@porthosp.nhs.uk
Phone	02392 432 333

You will need to give the Service Desk certain information, so always ensure you have the following information available. They may need to know:

Your Username.

The KB Number of the equipment. This is found on a small label (usually red or blue) stuck to the equipment.

The clinical system you were working on.

The patient's details e.g. case note no.

Exactly what you were attempting to do, e.g. log on, view a patient's results.

14.2. Out of office hours

Contact the IT Service Desk and leave a message on the answer machine. They will deal with the problem as soon as they can. Alternatively email them.

If you feel there is a major system problem contact the switchboard for them to contact the engineer on call.

14.3. IT Training

If you identify an error in this manual or think that it would be useful to include something that has not been covered, please contact IT Training.

Email	it.training@porthosp.nhs.uk
External Phone	02392 432 333

15. HELP WITH USING APEX

If you have only just attended the course and feel you may need additional support, help or advice, you can contact the IT Training Office.

* If you have not used your account for more than 12 months you will be required to re-attend your training.

Email	it.training@porthosp.nhs.uk
External Phone	02392 432 333

16. IT TRAINING CANDIDATE APPEALS PROCEDURE

- Candidates who are unhappy with any aspect of the end of course/test assessment decision should first discuss the problem with the IT Trainer at the time of receiving the result.
- The reasons must be made clear by the candidate at this time.
- If the candidate is still unhappy with the result further discussion should take place involving the IT Training Manager within 3 days of the course/test date.
- The IT Training Department will keep a record of such discussion together with date and outcome.
- Where necessary the 1st marker will be asked to re-mark and the marking checked by the IT Training Manager.
- It should be noted that if the candidate was borderline double marking should already have been undertaken.
- If this does not provide satisfaction the candidate may raise a formal appeal.
- Appeals will only be accepted if made in writing (not e-mail) to the Head of Engagement & Delivery within 10 days of the candidate receiving their result, outlining clearly the circumstance of the appeal.
- The 1st & 2nd markers will meet with the Head of Engagement & Delivery to consider if there are any aspects that should be taken into account in the candidate's performance.
- In some circumstances the candidate may be offered a re-test (e.g. hardware or software problems).
- If this is not the case and the result remains unchanged and the Training Manager is unable to resolve the impasse then the candidate may write to the Head of Engagement & Delivery (within 5 days of receiving the 3rd result) who will consider all evidence and circumstances of the appeal also taking into consideration responsibilities to the Trust and Data Protection Act to make a final decision.

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17. VERSION CONTROL/LOG

Manual	Apex Pathology	
Version	V.N2.4	
Date	April 2015	
Revisions		Page
Updated	Headers and Footers	All
Updated	Service desk numbers/ IT Training numbers	13
Updated	All reference to IT changed to IT	ALL

Manual	Apex Pathology	
Version	V.N2.3	
Date	July 2011	
Revisions		Page
Updated	Headers and Footers	All
Updated	Help desk to Service Desk	13

Manual	Apex Pathology	
Version	V.N2.2	
Date	March 2009	
Revisions		Page
Updated	Accessing Pathology –instructions for Powerterm method.	6
New	Instructions to by pass Terminal ID prompt	7

Manual	Apex Pathology	
Version	V.N2.1	
Date	January 2008	
Revisions		Page
Updated	Formatting and text refinements (unlisted as content and meaning unchanged)	All

Manual	APEX Pathology	
Version	V.N2	
Date	12 December 2005	
Revisions		Page
Updated	Information Governance Replaces previous Data Protection and Freedom of Information Act	3
Updated	Instructions re Answer Back message	6

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Version	V.N1	
Date	December 2005	
Revisions		Page
Updated	Format (front page, screen shots, font, layout, headings)	All
New	Course Criteria	2
New	Data Protection/Freedom of Information Act information	3
Moved	Username and Passwords section	4
Updated	Username and Passwords section	4
New	Instructions for Terminal ID (Answerback)	6
Updated	How to find a patient using a Casenote number	8
Updated	How to find a patient without a Casenote number	9
Updated	The Initial Screen	9
Updated	Ward Enquiry Options	10
New	Printing instructions	12
New	Refreshing your skills section	12
Moved	Fault Reporting section	13
Updated	Fault Reporting section (contact details)	13
New	Training Appeals Procedure	14