

## QuitManager Guidance Note Creating a new client and episode

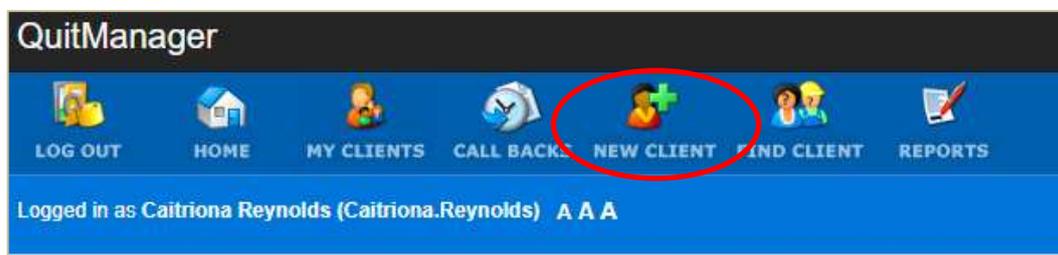
### The Purpose

This explains how to create a new client and an episode of care on QuitManager.

1. Create Client
2. Create episode – this is broken into 2 steps
3. Send SMS – GDPR leaflet
4. Record medical and smoking history.

### 1. Create Client

- Select “New Client”



- Complete information for New Client. All items marked with \* are mandatory fields

New Client:

Fields marked with an \* are required fields.

Forename\*  Surname\*  Date of Birth (dd/mm/yyyy)\*  Gender\*  Individual Health Identifier

- Click “Create Client”

New Client:

Fields marked with an \* are required fields.

Forename\*  Surname\*  Date of Birth (dd/mm/yyyy)\*  Gender\*  Individual Health Identifier

If a record already exists for the client, please refer to Guidance Note 5: Episode creation for a client with an existing record on QuitManager.

If the client has an open episode of care with another Advisor, please contact the SuperUsers ([quitmanager.tfi@hse.ie](mailto:quitmanager.tfi@hse.ie)), referencing the Client ID.

## 2. Create episode

### Episode Creation Step 1

- Select the correct clinic for your client

Episode Creation - Step 2

Select the clinic you would like to add this client's episode to:

Groups		
Name	Address	Options
We Can Quit - Balbriggan - Feb 2021	Aster FRC, 1 George's Square, Balbriggan, Co. Dublin	Select

One to Ones		
Name	Address	Options
Louth/Meath Virtual Smoking Cessation Clinic	Louth/Meath Virtual Smoking Cessation Clinic	Select
TFI Team Clinic	Perry Square	Select

### Episode Creation Step 2

- Complete **mandatory** fields and other fields as appropriate
- **Please remember to:** complete the demographic fields and the referral source

## 3. Send the GDPR text message

- This must be done as soon as the episode has been created
- Select "Client SMS" from the left hand column

- Client
  - Client Details
- Episode 1
  - Episode Details
  - Address
  - Medical
  - Sessions
  - Mark Complete
  - Client Letters
  - Client SMS**
  - Demographics

- Client details will be populated already. Select "Choose Template"

SMS

New Message

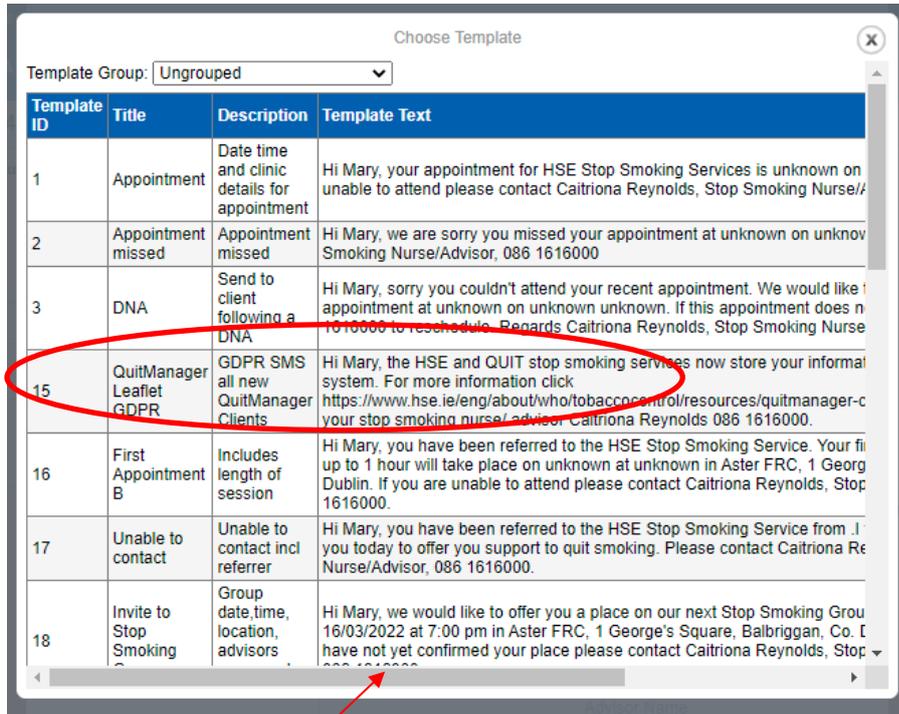
Recipient:

Contact Number:

**Choose Template**

Message Text:

- Select 15 “QuitManager Leaflet GDPR”



- You may need to scroll to the right to find the “Select” tab
- Before sending, check that your number is correct and edit if required. Only one advisor’s phone number can be added to a clinic. Many clinics have more than one advisor

### SMS

New Message

Recipient:

Contact Number:

Message Text: 

Hi Mary, the HSE and QUIT stop smoking services now store your information on the QuitManager system. For more information click <https://www.hse.ie/eng/about/who/tobaccocontrol/resources/quitmanager-client-information.pdf> or speak to your stop smoking nurse/ advisor Caitriona Reynolds 0871234568

- Send message

If the client does not have a mobile number, you must give them a hard copy of the Client Information leaflet, available to download [HERE](#). You must record having done this by using the “Add Comments” tab.

## 4. Complete Medical and Smoking History

- Select “Medical” from the left hand column



- If the client has no medical condition click the box as below

The 'Medical' section of the form. At the top, a message states: 'Patient does not have any relevant medical conditions and is not taking any relevant medication.' This message is circled in red. Below it, the 'Medical Conditions' section contains several checkboxes: Cancer, Diabetes, Mental illness, Renal Disease, Respiratory Disease, Cardiovascular Disease, Gastro-intestinal Disease, and Neurological Disease. All are currently unchecked.

- If the client has a medical condition, click the appropriate box, see example below:

The 'Medical History' section of the form. In the 'Medical Conditions' section, the 'Diabetes' checkbox is checked and circled in red. Below this section, the 'Any Other Details' label and its corresponding text box are circled in red. A red arrow points from the 'Any Other Details' label to the text box.

- Only use the “Any Other Details” box to enter additional information or if there is no appropriate box to choose from under “Medical Conditions”
- Complete the Smoking History fields at the bottom of the page before selecting “Save Changes”

### Further reading:

Client Information Leaflet (GDPR leaflet), available to download from [HERE](#)

Guidance Note 5: Episode Creation for Client with an Existing QuitManager record, available to download from [HERE](#)

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### Contact Us:

If you have any further queries please email [quitmanager.tfi@hse.ie](mailto:quitmanager.tfi@hse.ie)

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