



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"

		0.		-	07	
LOG OUT	HOME	MY CLIENTS	CALL BACK	NEW CLIENT	IND CLIENT	REPORTS

• Complete information for New Client. All items marked with $^{m *}$ are mandatory fields

New Client									
Fields marked w	ith an " are require	d fields.							
Forename*	Mary	Sumame*	Smith	Date of Birth (ddimm/yyyy)*	01/01/1975	Gender*	Female 🗸	Individual Health Identifier	
Create Clie	at								

• Click "Create Client"

Vew Client								
Fields marked w	ith an * are required	fields.						
Forename*	Wary	Sumame *	Smith	Date of Birth (ddimm/yyyy)*	01/01/1975	Gender*	Female 🗸 Individual Healt) identifier
Create Clie								

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 (<u>quitmanager.tfi@hse.ie</u>), referencing the Client ID.

2. Create episode

Episode Creation Step 1

• Select the correct clinic for your client

pisode Creation - Step 2		
Select the clinic you would like to add this clients episode to		
Groups		
Name	Address	Options
We Can Guil - Balbriggen - Feb 2021	Acter FRC, 1 George's Square, Babriggan, Co. Dublin	Relect
One to Ones		
Name :	Address	Options
Louts/Meeth Virtual SmokingCessation Clinic	Louth Meath Votual Scoting Cessation Citric	Select
TFI Team Clinic	Perry Bouard	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 details will be populated already. Select "Choose Template"

SMS	
New Message	
Recipient:	Mary Smith
Contact Number:	0871234568
Choose Template	\supset
Message Text:	

ſ				Choose Template	x)
L	Template G	roup: Ungrou	iped	▼	*
	Template ID	Title	Description	Template Text	
	1	Appointment	Date time and clinic details for appointment	Hi Mary, your appointment for HSE Stop Smoking Services is unknown on unable to attend please contact Caitriona Reynolds, Stop Smoking Nurse//	
	2	Appointment missed	Appointment missed	Hi Mary, we are sorry you missed your appointment at unknown on unknov Smoking Nurse/Advisor, 086 1616000	
	3	DNA	Send to client following a	Hi Mary, sorry you couldn't attend your recent appointment. We would like a appointment at unknown on unknown unknown. If this appointment does n 1010000 to reschedule. Begards Caitriona Reynolds, Stop Smoking Nurse	
	15	QuitManager Leaflet GDPR	GDPR SMS all new QuitManager Clients	Hi Mary, the HSE and QUIT stop smoking services now store your informal system. For more information click https://www.hse.ie/eng/about/who/tobaccocentrol/resources/quitmanager-c your stop smoking nuse/ advisor caltriona Reynolds 086 1616000.	
	16	First Appointment B	Includes length of session	Hi Mary, you have been referred to the HSE Stop Smoking Service. Your fii up to 1 hour will take place on unknown at unknown in Aster FRC, 1 Georg Dublin. If you are unable to attend please contact Caitriona Reynolds, Stop 1616000.	
	17	Unable to contact	Unable to contact incl referrer	Hi Mary, you have been referred to the HSE Stop Smoking Service from .1 you today to offer you support to quit smoking. Please contact Calitriona R ε Nurse/Advisor, 086 1616000.	
	18	Invite to Stop Smoking	Group date,time, location, advisors	Hi Mary, we would like to offer you a place on our next Stop Smoking Grou 16/03/2022 at 7:00 pm in Aster FRC, 1 George's Square, Balbriggan, Co. I have not yet confirmed your place please contact Caitriona Reynolds, Stop	•
L	4			×	
				<u>Advisor Name</u>	

- 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	
ew Message	
Recipient:	Mary Smith
Contact Number:	0871234568
Choose Template	
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.bee.te/eng/about/who/tobaccocontrol/reserver/ /quitmanager-client-information.pdf or speak to your stop smoking nurse/ advisor Caitriona Reynolds 0871234569

• 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 <u>HERE</u>. 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

		5-27-20-20-20-20-20-20-20-20-20-20-20-20-20-		
		Platient-does not have	s any relevant medical conditions as	id is not taking any relevant methodion.
ical History				
Medical Conditions				
Cancer	Databas	C Mantal Imaza	Rena Disease	Besperatory Disease
	Gartin-Intertional Diseases	Chausebore of Dansers		

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

Medical History

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- 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 <u>HERE</u>

Contact Us:

If you have any further queries please email quitmanager.tfi@hse.ie