

# CS R4+ (England Only)

## Submitting Triage Reporting Data using CS R4+

This 6-page handout is aimed at all clinical staff members and shows how to submit triage appointment data using CS R4+ practice management software.

### Why is this being introduced?

As part of the current Coronavirus Act 2020, practices are being requested to provide additional data to help Public Health England monitor and manage the response to COVID-19 in relation to dental activity. At the present time this data must be entered manually through the NHSBSA online portal (Compass).

In order to assist practices, from 30<sup>th</sup> November 2020 it will be possible to submit this data as part of the normal EDI transmission process in CS R4+.

The data can be transmitted as a stand-alone claim where the patient does not attend the practice for treatment (Band 6) or as part of a normal or ortho claim after treatment has been completed at the practice.

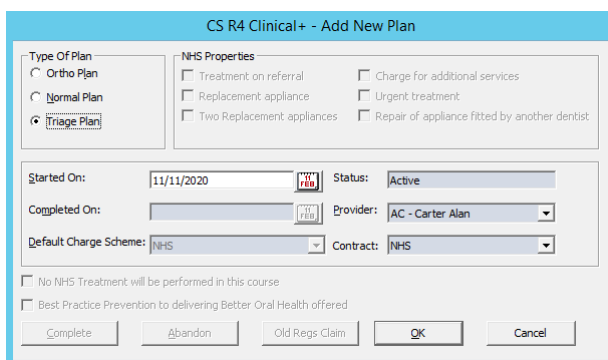


**Note:** If the information has already been submitted through Compass then it should not be re-transmitted through CS R4+.

Handout

### Creating a Triage Only (Band 6) Course of Treatment Using the Treatment Tab

A Triage Plan can be created directly from the patient's Treatment tab by clicking Add New Course.

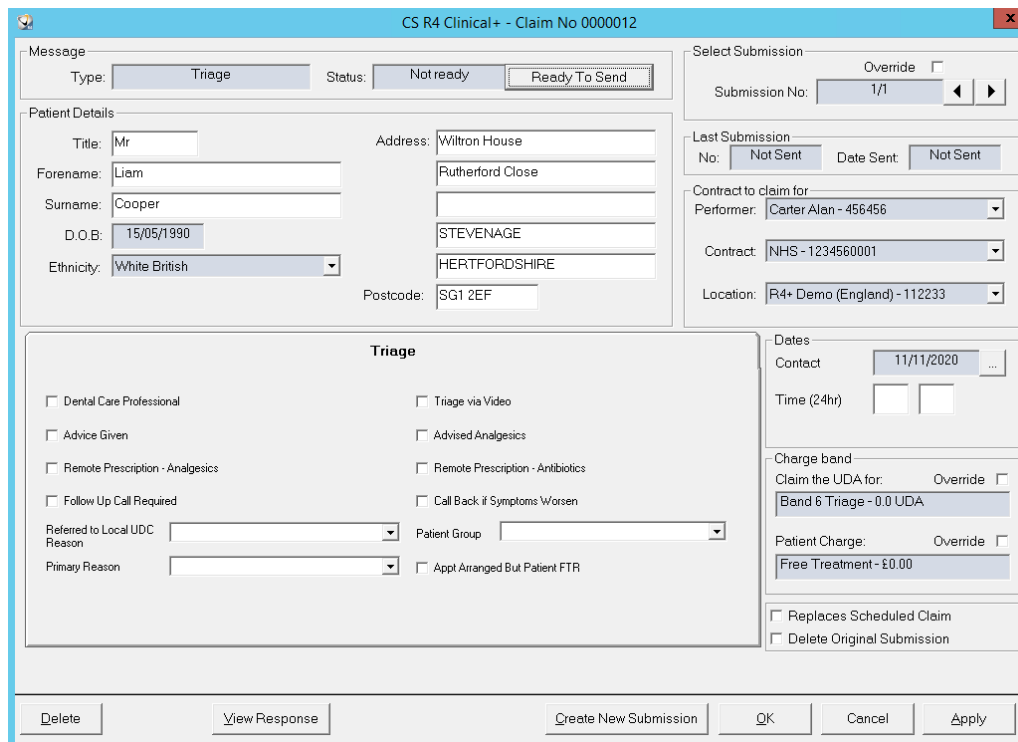


The Add New Plan window now has a new option under Type of Plan called Triage Plan.

Once selected, the Started On date: can be modified but all the other options are disabled. Clicking OK will start an empty course of treatment.

## Submitting Triage Reporting Data using CS R4+ (NHS England only)

Clicking Complete will close the course of treatment and generate the FP17 claim form.



In the Triage section complete the relevant fields by placing a tick in the box or selecting the required option from the drop-down lists.

In the Dates section enter the date and time of the initial contact.

Once you are happy that all the information is correct, click Ready To Send.

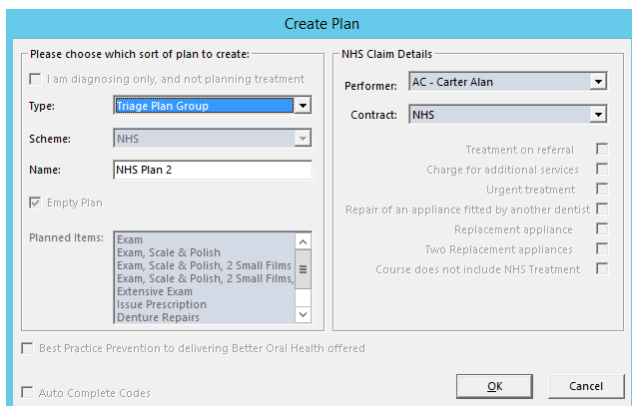


**Note:** If the Triage appointment took place prior to 30<sup>th</sup> November 2020 it must be entered through Compass and must not be submitted through CS R4+.

## Submitting Triage Reporting Data using CS R4+ (NHS England only)


### Creating a Triage Only (Band 6) Course of Treatment from the Patient's Clinical Chart

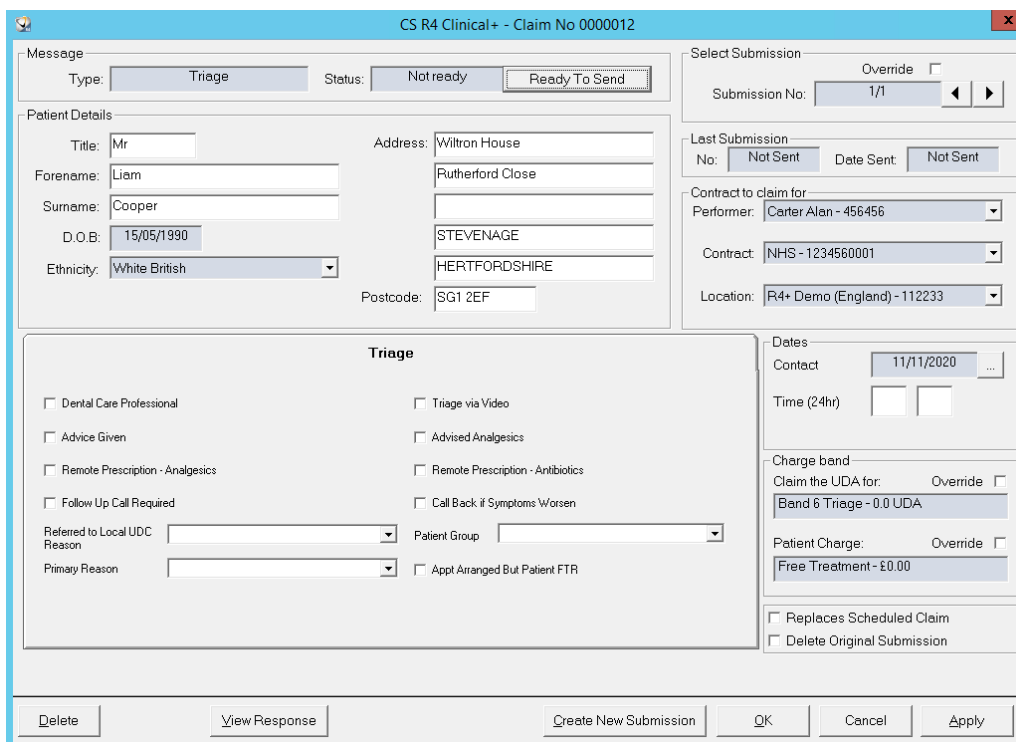
A Triage Plan can also be created directly from the patient's clinical chart.



When the Create Plan window is displayed select Triage Plan Group from the Type drop-down list.

Once selected, the name of the course of treatment can be modified but all the other options will be disabled. Clicking OK will start an empty course of treatment.

Clicking  will complete the current plan and generate the FP17 claim form.



## Submitting Triage Reporting Data using CS R4+ (NHS England only)

In the Triage section complete the relevant fields by placing a tick in the box or selecting the required option from the drop-down lists.

In the Dates section enter the date and time of the initial contact.

Once you are happy that all the information is correct, click Ready To Send.

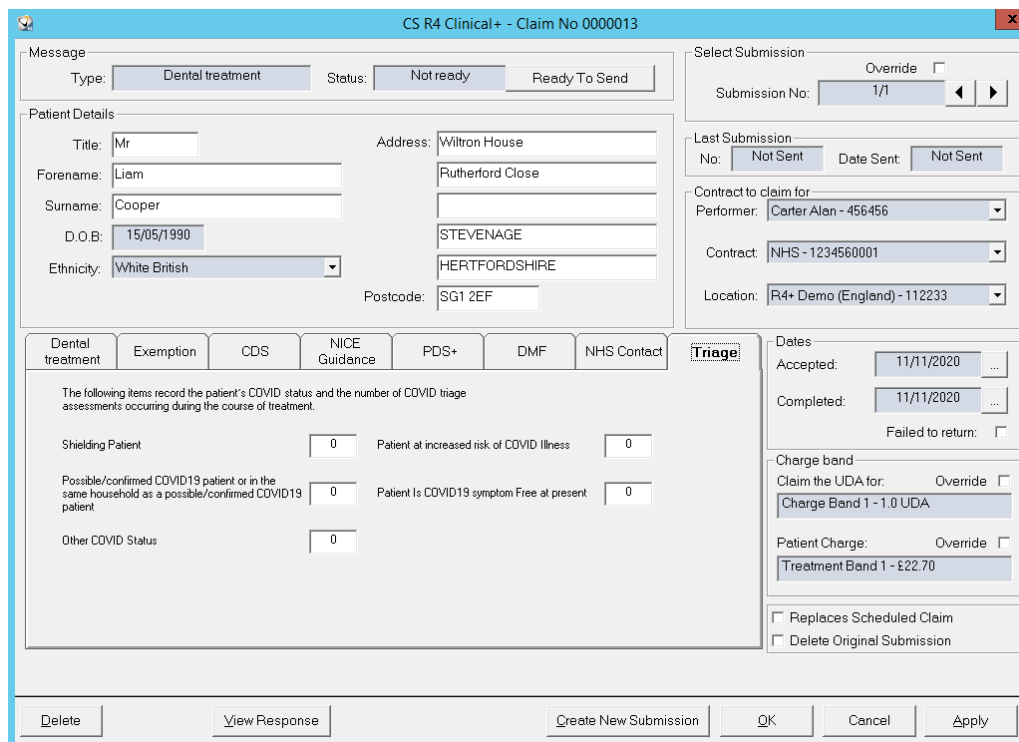


**Note:** If the Triage appointment took place prior to 30<sup>th</sup> November 2020 it must be entered through Compass and must not be submitted through CS R4+.

### Including Triage Data in a Normal Course of Treatment

If a triage assessment is carried out on a patient who attends the practice for dental treatment, the Triage data can be included on the normal FP17 Claim Form.

Complete all treatment items in the normal way and complete the course of treatment to generate the FP17 claim Form. Once you are happy that all the usual information is correct click on the Triage tab.



The screenshot shows the 'CS R4 Clinical+ - Claim No 0000013' window. The 'Message' section shows 'Type: Dental treatment' and 'Status: Not ready / Ready To Send'. The 'Patient Details' section includes fields for Title (Mr), Forename (Liam), Surname (Cooper), D.O.B. (15/05/1990), and Ethnicity (White British). The address is Wiltton House, Rutherford Close, STEVENAGE, HERTFORDSHIRE, SG1 2EF. The 'Triage' section has tabs for Dental treatment, Exemption, CDS, NICE Guidance, PDS+, DMF, NHS Contact, and Triage. The Triage section contains several assessment items with input fields: 'Shielding Patient' (0), 'Patient at increased risk of COVID illness' (0), 'Possible/confirmed COVID19 patient or in the same household as a possible/confirmed COVID19 patient' (0), 'Patient is COVID19 symptom Free at present' (0), and 'Other COVID Status' (0). The 'Dates' section shows 'Accepted: 11/11/2020' and 'Completed: 11/11/2020'. The 'Submission' section shows 'Submission No: 1/1', 'Contract to claim for: Carter Alan - 456456', 'Contract: NHS - 1234560001', and 'Location: R4+ Demo (England) - 112233'. The bottom of the window has buttons for 'Delete', 'View Response', 'Create New Submission', 'OK', 'Cancel', and 'Apply'.

## Submitting Triage Reporting Data using CS R4+ (NHS England only)

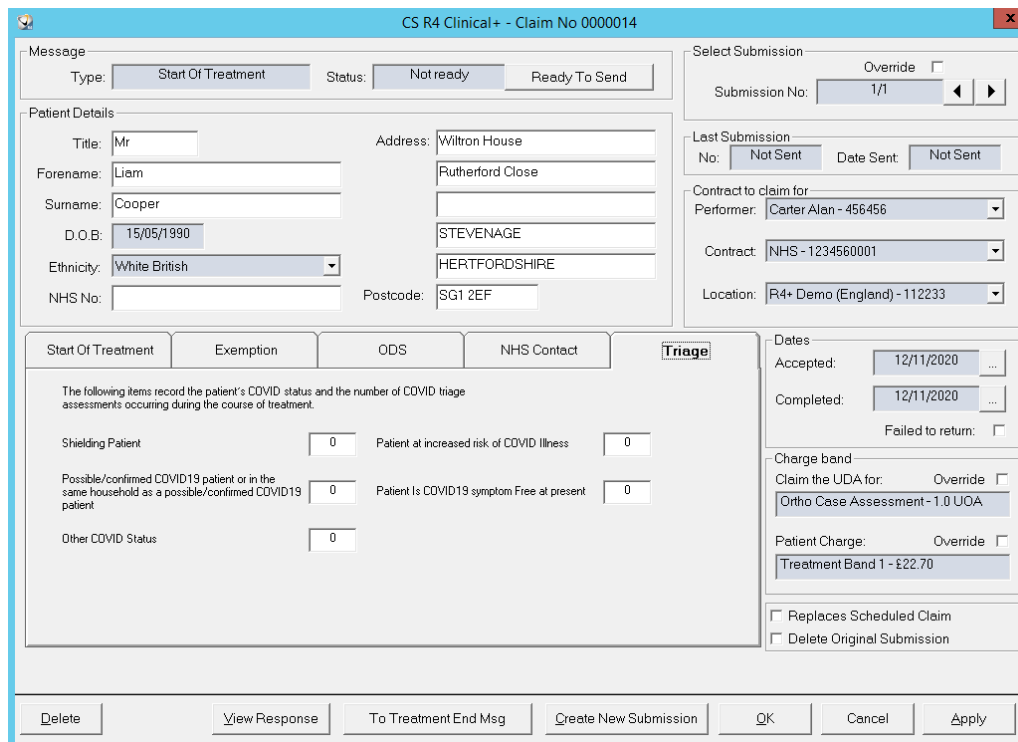
Complete the relevant fields by entering the number of times that the patients' COVID status was established during the course of treatment. It is possible to enter figures in more than one field if necessary.

Once you are happy that all the information is correct, click Ready To Send.

### Including Triage Data in an Orthodontic Course of Treatment

If a triage assessment is carried out on a patient who attends the practice for dental treatment, the Triage data can be included on the normal FP170 Claim Form.

Complete all treatment items in the normal way and complete the course of treatment to generate the FP170 claim Form. Once you are happy that all the usual information is correct click on the Triage tab.



The screenshot shows the 'CS R4 Clinical+ - Claim No 0000014' window. The 'Message' section has 'Type: Start Of Treatment' and 'Status: Not ready'. The 'Patient Details' section includes: Title: Mr, Forename: Liam, Surname: Cooper, D.O.B: 15/05/1990, Ethnicity: White British, NHS No: [blank], Address: Wiltron House, Rutherford Close, STEVENAGE, HERTFORDSHIRE, Postcode: SG1 2EF. The 'Triage' tab is active, showing a table for recording COVID status and triage assessments:

Start Of Treatment	Exemption	ODS	NHS Contact	Triage
The following items record the patient's COVID status and the number of COVID triage assessments occurring during the course of treatment.				
Shielding Patient	0	Patient at increased risk of COVID illness	0	
Possible/confirmed COVID19 patient or in the same household as a possible/confirmed COVID19 patient	0	Patient Is COVID19 symptom Free at present	0	
Other COVID Status	0			

Other form fields include: 'Select Submission' (1/1), 'Last Submission' (Not Sent), 'Contract to claim for' (Carter Alan - 456456), 'Contract' (NHS - 1234560001), 'Location' (R4+ Demo (England) - 112233), 'Dates' (Accepted: 12/11/2020, Completed: 12/11/2020), 'Charge band' (Ortho Case Assessment - 1.0 UOA), and 'Patient Charge' (Treatment Band 1 - £22.70). Buttons at the bottom include Delete, View Response, To Treatment End Msg, Create New Submission, OK, Cancel, and Apply.

Complete the relevant fields by entering the number of times that the patients' COVID status was established during the course of treatment. It is possible to enter figures in more than one field if necessary.

Once you are happy that all the information is correct, click Ready To Send.

## Submitting Triage Reporting Data using CS R4+ (NHS England only)

### Searching for Triage (Band 6) Claim Forms on the EDI Claims screen

Any completed Triage (Band 6) claim form can be found by searching the EDI claims.

The screenshot shows the 'CS R4 Clinical+ - Claims' search interface. The 'Criteria' section has 'Type' set to 'All' and 'Dentist' set to 'AC Carter Alan'. The search results table is as follows:

Claim Ref	Forename	Surname	Initials	Accepted	Type	Patient	DPB	Total	rth	UDA/UDX
000001	Minion	Kevin	AC	0	26/02/2020	Dental treatment	0.00			0
000003	Minion	Kevin	AC	0	26/02/2020	Dental treatment	0.00			1
000004	Minion	Kevin	AC	0	26/02/2020	Dental treatment	0.00			1
000005	Minion	Kevin	AC	0	26/02/2020	Dental treatment	0.00			1
000010	Alan	Smith	AC	0	10/11/2020	Triage	0.00			0
000011	James	Smith	AC	0	10/11/2020	Dental treatment	22.70			1
000012	Liam	Cooper	AC	0	11/11/2020	Triage	0.00			0
000013	Liam	Cooper	AC	0	11/11/2020	Dental treatment	22.70			1

8 Records

In addition to the existing options a new option has been added to the Type drop-down list under Criteria if you only wish to display Triage claims in the result.

The screenshot shows the 'CS R4 Clinical+ - Claims' search interface with 'Type' set to 'Triage'. The 'Criteria' section has 'Type' set to 'Triage' and 'Dentist' set to 'Prior Approval Orthodontic Triage Only Other'. The search results area is empty, showing '<No of Records>'. The 'Include' section has 'Totals', 'All patients', 'All Acceptances', and 'All Completions' checked.



**Note:** The number of Triage (Band 6) claim forms will also appear on the NHS Activity Report from the Utilities menu.