

**Standard Operating Procedure
Joining the Breast Cancer Self-Managed Pathway (SMP)**

Purpose:	Management of patients joining the SMP, through the use of Clinic Outcome Forms			
Scope:	ANP's, receptionists, anyone involved in the process of a patient joining the SMP			
SOP Reference Number:	SMP 2			
SOP Relates To:	Criteria for Personalised Breast Cancer Follow Up SMP1			
Date of Issue:	February 2021 TBC			
Date of Review:	December 2022			
Version Control:	Version	Date	Author(s)	Summary of Changes
	0.5	April 2020	Mike Barnett	Ready for Directorate review
	0.6	February 2021	Dorinda Palmer	Removed process for existing patients Updated links to Appendices

Introduction

SOP SMP1 indicates the decision making process which allocates patients to the self-managed pathway (SMP).

For new patients, they are advised via a Results Clinic.

This SOP describes how new patients will be recommended to join the SMP via attendance at an End of Treatment Review (EOTR) clinic.

Patients are only placed on the SMP after attending an EOTR clinic, at which specific steps must be undertaken, including giving advice to the patient on self-management, access to support when it is needed, and what to do if symptoms occur. After joining the SMP, the Macmillan Breast Care Navigator has a key role in tracking and monitoring the patient, and in providing support via the Helpline. All staff involved in delivering this pathway will be appropriately trained and supported.

Clinic outcome forms must be processed correctly to ensure patients remain on the appropriate follow up and are not discharged

Scope

This SOP applies to ALL staff who are involved in the management of patients joining the SMP including the updating of Trust records.

Section	Instruction	References
1	<p>Overview of process – new patients</p> <p>MDT decides that patient is suitable to join SMP</p> <p>Patient attends End of Treatment Review clinic (led by ANP) three months after treatment is complete</p> <p>ANP confirms no clinical concerns have emerged since treatment completed, and that patient agrees to join SMP</p> <p>Navigator updates Trust systems, tracks patients progress using partially booked waiting list and Remote Monitoring System (RMS)</p> <p>Navigator provides support to patient via Helpline, referring patients to CNS/ANP colleagues where appropriate (see Helpline SOP)</p>	
1.1	<p>New patients</p> <p><u>At the Results Clinic</u> Consultant advises patient that they are recommended to join SMP, three months after their treatment is completed</p> <p>Where <u>no further surgery and no oncological treatment is planned</u>, the surgeon undertaking the Results Clinic will complete a Clinic Outcome form, referring patient to EoTR Clinic (see Section 1.2)</p> <p>Where no further surgery is planned, <u>but oncological treatment is planned</u>, the surgeon will complete a Clinic Outcome form accordingly, so that the planned oncological treatment takes place. <i>(no change to existing procedures)</i></p> <p><u>After completion of oncological treatment</u> The clinician responsible for the patient’s oncological care will undertake a clinical assessment.</p> <p>If further treatment is indicated, the oncology clinician will make the appropriate referral/appointment, completing the Clinic Outcome form as appropriate <i>(no change to existing procedures)</i></p> <p>If no further treatment is required, the clinician will complete a Clinic Outcome form, referring the patient to End of Treatment Review clinic.(see Section 1.2)</p>	<pre> graph TD A[MDT decision] --> B[No further surgery – oncology treatment] A --> C[No further treatment] B --> D[Oncology treatment complete] D --> E[Join self managed pathway] C --> E </pre>

Section	Instruction	References
1.2	<p>Process relating to Clinic Outcome Form for NEW patients being referred to End of Treatment Review clinic</p> <p><u>Consultant /oncologist responsibility</u> For new patients who are joining the Self-Managed Pathway the Clinic Outcome form for <u>Consultant Results Clinic</u> appointment should be completed as below:</p> <p><u>On section ONE of Clinic Outcome form</u>, select: “Internal referral for same condition”</p> <p><u>On section TWO of Clinic Outcome form</u>, select: “CNS/ANP/Nurse/other” and circle ANP</p> <p>Date of the appointment to join the SMP: to be three months after the date of the Results Clinic appointment.</p> <p>Ensure Outcome form is delivered to reception staff</p> <p><u>Reception staff responsibility</u> Update Medway in accordance with instruction on Outcome Form</p>	<p>See Appendix 1 for example of appropriate completed Clinic Outcome form</p> <p>See Appendix 4 for codes to be used and further detail and guidance</p>
2	<p><u>For existing patients</u></p> <p>Patients attending Professional Care Pathway follow-up (consultant/oncologist) appointments, by mutual agreement between the patient and clinician, may join the SMP.</p> <p>The clinician will complete a Clinic Outcome Form</p>	<p>See Appendix 2 for example of appropriate completed Clinic Outcome form</p>
3	<p><u>End of Treatment review (EOTR) clinic</u></p> <p>Elements of EoTR clinic are:</p> <ul style="list-style-type: none"> • Clinical Examination (where appropriate) • HNA - Signposting • Discussion post treatment – back to family life/back to work/sexual issues/menopausal issues/side effects • Discussion of how SMP works • Signs and symptoms to watch out for/who to contact via Helpline • Provide Self-Managed Pathway patient booklet • Benefits of attending Health & Well Being events and accessing other support in the community • End of Treatment Summary- copy to patient and GP • Confirmation that all remaining consultant/oncologist appointments will be cancelled while patient is on SMP <p>On completion of this appointment the ANP will complete the relevant Clinic Outcome form and the patient will pass this onto the clinic receptionist (see section 3.1)</p>	<p>The ANP is accountable for the completeness and accuracy of the End of Treatment Summary</p>

Section	Instruction	References
3.1	<p>After patient has attended End of Treatment Review (EOTR) clinic</p> <p><u>ANP responsibility</u> Complete online iPortal RTT outcome form:</p> <p><u>On section ONE of Clinic Outcome form</u>, select: “Ref onto another Consultant/Department “</p> <p><u>On section TWO of Clinic Outcome form</u>, select: “SMP Consultant Partial Booking List</p> <p>Complete weeks/months section: x months – where x = unexpired months since diagnosis, so that total time patient has been in hospital care is 60 months (5 years)</p> <p><u>Ensure reception staff receive the completed Outcome Form</u></p>	<p>See Appendix 3</p> <p>For example – pt diagnosed Jan 2019, undergoes extended treatment, commences on SMP in Jan 2021, ‘36 months’ to be entered on Outcome Form</p>
3.2	<p><u>Reception /other admin staff responsibility</u></p> <p><u>Update Medway - from Clinic Outcome Form:</u></p> <ul style="list-style-type: none"> - Record outcome - R1 the Breast Care Nurse referral - Under the correct referral/s (Breast/Oncology) set Partial Booking details - The Acknowledgment date is the date they were seen by the ANP for their EoTR appointment - If pt is on anti-hormone treatment, ‘Appt by’ date needs to be 5yrs after starting anti-hormone treatment - All other pts, ‘Appt by’ date will be 5yrs from when they started their treatment. - ANP will calculate the 5yr ‘Exp appt date’ for partial booking. - In the comments field, type: “Patient added to Self-Managed Pathway (SMP) to be seen (month/year.) - Under ‘selected schedules’, the relevant consultants SMP partial booking code will need to be selected. <p><u>NOTE</u> if patient is under both breast and oncology teams this process needs to be done on both referrals – section 4</p> <p>The Macmillan Breast Care Navigator is responsible for adding the patient to the RMS, and for maintaining this status through any changes. They will also check patients record for relevant oncology appts and seek ANP advice regarding cancellation of these</p>	<p>Appendix 5</p>
4	<p><u>Example 1</u></p> <p>Mrs Smith is under the Breast team only. After her EOTR appointment with the ANP she will need to be added onto the Breast SMP partial booking waiting list code under the Breast referral only.</p>	

Section	Instruction	References
	<p><u>Example 2</u> Mrs Jones is under both the Breast and Oncology teams. After her EOTR appointment with the ANP a Breast SMP partial booking waiting list will need to be added under the Breast referral and an Oncology SMP partial booking waiting list will need to be added under the Oncology referral.</p>	

Appendix 1 – Example outcome form completed by CONSULTANT /CLINICIAN
 - New patient, **no further treatment**, referred to ANP to join SMP



Dear Patient, after your appointment please hand this form to the receptionist before leaving the area.

Clinic Outcome Form

Consultant/Clinician: =		Clinic code: =	Date/Time: =
Clinic-Prep-for-xxxx- Speciality=		Referral-To-Treatment-Status: =	Appointment-Type=
Name:† Date of Birth: Local-Identifier:† NHS-Number: =		Breach-Date:† Weeks-To-Breach: =	

Section one: =		Complete-Section-Two=	Please-tick-one=	Medway-Outcome=
Appointment Outcomes	1st-treatment-given--follow-up-required=	YES=	<input type="checkbox"/>	FU1BN/FUPB=
	1st-treatment-given--discharged=	<input type="checkbox"/>	<input type="checkbox"/>	D1=
	Substantially-new-treatment-given-or-started-Follow-up-appointment-required=	YES=	<input type="checkbox"/>	FU1BN/FUPB=
	Substantially-new-treatment-given-or-started-Discharged=	<input type="checkbox"/>	<input type="checkbox"/>	D1=
	Discharge-/Decision-not-to-treat-/No-treatment-required=	<input type="checkbox"/>	<input type="checkbox"/>	D1=
	Treatment-declined-by-patient=	<input type="checkbox"/>	<input type="checkbox"/>	D1=
	Watchful-waiting--doctor-initiated=	YES=	<input type="checkbox"/>	FU1BN/FUPB=
	Watchful-waiting--patient-initiated=	YES=	<input type="checkbox"/>	FU1BN/FUPB=
	Follow-up-appointment-required--same-condition=	YES=	<input type="checkbox"/>	FU1BN/FUPB=
	Sent-for-tests=	YES=	<input type="checkbox"/>	R3=
	Add-to-the-waiting-list=	<input type="checkbox"/>	<input type="checkbox"/>	A1DC/A21P=
	Add-to-waiting-list-new-treatment=	<input type="checkbox"/>	<input type="checkbox"/>	A1DC/A21P=
	Internal-referral-for-same-condition=	YES=	<input checked="" type="checkbox"/>	R1=
	Referral-to-other-external-provider-(excl-County-&-R3)=	<input type="checkbox"/>	<input type="checkbox"/>	R2=
	Patient-DNA--Discharge=	<input type="checkbox"/>	<input type="checkbox"/>	DNAFAD/DNASAD=
Patient-DNA--Further-appointment-to-be-offered=	YES=	<input type="checkbox"/>	DNAFAPB/DNAFABN† /DNASAPB/DNASABN=	
Patient-left-without-being-seen-follow-up-required=	YES=	<input type="checkbox"/>	FU1BN/FUPB=	
Patient-left-without-being-seen-discharged=	<input type="checkbox"/>	<input type="checkbox"/>	D1=	
Close-referral-care-continues=	<input type="checkbox"/>	<input type="checkbox"/>	D4=	

Section Two:†		Please tick all that apply=		Weeks=	Months=
Follow-up	1. Consultant=	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2. Any Clinician=	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3. C/S/ANP/Nurse/other=	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
	4. Telephone follow-up=	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5. Test/results-review-only--add-to-tests-Virtual-Partial-Booking-List=	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	6. Self-Managed-Pathway--add-to-Consultant-Partial-Booking-List=	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

For procedures performed in clinic, please complete coding overleaf to ensure correct payment†



Appendix 2 – Example outcome form completed by CONSULTANT - Existing patient on professional pathway, referred to ANP to join SMP



Dear Patient, after your appointment please hand this form to the receptionist before leaving the area.

University Hospitals of North Midlands NHS

Clinic Outcome Form

Consultant/Clinician: =		Clinic code: =	Date/Time: =	
Clinic-Prep-for-xxxx- Speciality=		Referral-To-Treatment-Status: =	Appointment-Type: =	
Name: } Date of Birth: } Local Identifier: } NHS-Number: =		Breach- Date: } Weeks-To-Breach: =		

Section one		Complete-Section-Two	Please-tick-one	Medway-Outcome
Appointment-Outcome	1st-treatment-given--follow-up-required	YES	<input type="checkbox"/>	FU1BN/FUPB
	1st-treatment-given--discharged	<input type="checkbox"/>	<input type="checkbox"/>	D1
	Substantially-new-treatment-given-or-started-Follow-up-appointment-required	YES	<input type="checkbox"/>	FU1BN/FUPB
	Substantially-new-treatment-given-or-started-Discharged	<input type="checkbox"/>	<input type="checkbox"/>	D1
	Discharge-/Decision-not-to-treat-/No-treatment-required	<input type="checkbox"/>	<input type="checkbox"/>	D1
	Treatment-declined-by-patient	=	=	D1
	Watchful-waiting--doctor-initiated	YES	<input type="checkbox"/>	FU1BN/FUPB
	Watchful-waiting--patient-initiated	YES	<input type="checkbox"/>	FU1BN/FUPB
	Follow-up-appointment-required--same-condition	YES	<input type="checkbox"/>	FU1BN/FUPB
	Sent-for-tests	YES	<input type="checkbox"/>	R3
	Add-to-the-waiting-list	<input type="checkbox"/>	<input type="checkbox"/>	A1DC/A21P
	Add-to-waiting-list-new-treatment	=	=	A1DC/A21P
	Internal-referral-for-same-condition	YES	<input checked="" type="checkbox"/>	R1
	Referral-to-other-external-provider-(excl-County-&-R3)-	<input type="checkbox"/>	<input type="checkbox"/>	R2
	Patient-DNA--Discharge	=	=	DNAFAD/DNASAD
Patient-DNA--Further-appointment-to-be-offered	YES	<input type="checkbox"/>	DNAFAPB/DNAFABN /DNASAPB/DNASABN	
Patient-left-without-being-seen-follow-up-required	YES	=	FU1BN/FUPB	
Patient-left-without-being-seen-discharged	<input type="checkbox"/>	<input type="checkbox"/>	D1	
Close-referral-care-continues	<input type="checkbox"/>	<input type="checkbox"/>	D4	

Section Two	Please tick all that apply	Weeks	Months	Follow-up	
				Next available	
Follow-up	1. Consultant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	2. Any Clinician	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	3. CNS/ANP/urse/other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Next available
	4. Telephone follow-up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	5. Test/results review only -- add to tests-Virtual-Partial-Booking-List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	6. Self-Managed-Pathway -- add to Consultant-Partial-Booking-List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

For procedures performed in-clinic, please complete coding overleaf to ensure correct payment



Appendix 3 – Example outcome form completed by ANP – patient joining SMP

Standard Operating Procedure - SMP2 Joining the breast SMP
Date approved: (to be confirmed)
Date for Review: (to be approval +24m)





Dear Patient, after your appointment please hand this form to the receptionist before leaving the area.

Clinic Outcome Form

Consultant/Clinician: =		Clinic code: =		Date/Time: =	
Clinic Prep for xxxx: Speciality =		Referral To Treatment Status: =		Appointment Type: =	
Name: } Date of Birth: } Local Identifier: } NHS Number: =		Breach Date: } Weeks To Breach: =			
Section one			Complete Section Two	Please tick one	Medway Outcome
Appointment Outcome	1st treatment given – follow-up required =		YES =	<input type="checkbox"/>	FU1BN/FUPB =
	1st treatment given - discharged =		<input type="checkbox"/>	<input type="checkbox"/>	D1 =
	Substantially new treatment given or started. Follow-up appointment required =		YES =	<input type="checkbox"/>	FU1BN/FUPB =
	Substantially new treatment given or started. Discharged =		<input type="checkbox"/>	<input type="checkbox"/>	D1 =
	Discharge / Decision not to treat / No treatment required =		<input type="checkbox"/>	<input type="checkbox"/>	D1 =
	Treatment declined by patient =		<input type="checkbox"/>	<input type="checkbox"/>	D1 =
	Watchful waiting – doctor initiated =		YES =	<input type="checkbox"/>	FU1BN/FUPB =
	Watchful waiting – patient initiated =		YES =	<input type="checkbox"/>	FU1BN/FUPB =
	Follow-up appointment required – same condition =		YES =	<input type="checkbox"/>	FU1BN/FUPB =
	Sent for tests =		YES =	<input type="checkbox"/>	R3 =
	Add to the waiting list =		<input type="checkbox"/>	<input type="checkbox"/>	A1DC/A21P =
	Add to waiting list – new treatment =		<input type="checkbox"/>	<input type="checkbox"/>	A1DC/A21P =
	Internal referral for same condition =		YES =	<input checked="" type="checkbox"/>	R1 =
	Referral to other external provider (excl County & R's) =		<input type="checkbox"/>	<input type="checkbox"/>	R2 =
	Patient DNA - Discharge =		<input type="checkbox"/>	<input type="checkbox"/>	DNAFAD/DNASAD =
Patient DNA – Further appointment to be offered =		YES =	<input type="checkbox"/>	DNAFAPB/DNAFABN } /DNASAPB/DNASABN =	
Patient left without being seen follow-up required =		YES =	<input type="checkbox"/>	FU1BN/FUPB =	
Patient left without being seen discharged =		<input type="checkbox"/>	<input type="checkbox"/>	D1 =	
Close referral care continues =		<input type="checkbox"/>	<input type="checkbox"/>	D4 =	
Section Two		Please tick all that apply		Weeks	Months
Follow-up	1. Consultant =		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2. Any Clinician =		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3. CNS/ANP/Nurse/other =		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4. Telephone follow-up =		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5. Test/results review only – add to tests Virtual Partial Booking List =		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	6. Self-Managed Pathway – add to Consultant Partial Booking List =		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				Mm/yyyy - See SOP section 3A	

For procedures performed in clinic, please complete coding overleaf to ensure correct payment



Appendix 4

How to book patients onto an End of Treatment Review Clinic (Induction - Self-Managed Pathway) (SOP section 1.2)

Patients who have received both surgical and oncology treatment

When patients have finished their treatment, the Oncology ANP will fill out an outcome form for patient to see Breast ANP in 3 months at an End of Treatment review clinic (prior to them joining the Self-Managed Pathway)

To process the outcome form, oncology reception will need to:

- 1) log an internal referral from Oncology to Breast Care nurse and
- 2) add a partial booking waiting list for 3 months' time.

NOTE - You will need to make a note of the Pathway ID for the Breast and Oncology referral. This will help further down the process.

Log referral:

Log a new referral for the Breast Care Nurse

Referral Type: Nurse Led Clinic

Source of Referral: Consultant – Internal same provider. This will be from Oncology

Referred by: This will be the consultant who the patient is under

Referral Dates: This will be the date of the patients last date of treatment

Assessment: Routine

Clinician: Breast Care Nurse

Speciality: Breast Surgery

Referral Note/Comment: End of Treatment Review (EOTR) onto SMP

RTT: Existing pathway – you will need to select correct pathway. Breast and Oncology pathway ID

Actual Status: 90 – Post 1st Treatment

Adding the patient onto the ANP partial book

Set partial booking – you need to select the correct referral. Breast Care Nurse Referral.

Appt Duration: Leave this as 0

Notes/comments: ANP induction apt for 3 months

Selected Scheduled: You will need to select the correct ANP EoTR/induction code

BREAST-OANPISMP - Breast old ANP Induction Self-Managed Pathway.	Stoke – Outpatients Main Building
BREAST-OANPSMP2 - Breast old ANP Induction Self-Managed Pathway.	Stoke – Radiotherapy Department
BREA-OANPISMP2CO - Breast old ANP Induction Self-Managed Pathway.	County – Breast Care
BREA-OANPSMP2CO2 - Breast old ANP Induction Self-Managed Pathway.	County – OP Ground Floor

Acknowledgment date: This will be the date of the patients last date of treatment - this will match the referral date you have logged from Oncology to Breast Care Nurse.

Expected date: This date will be when they need to see the ANP. 3 months after the patients last date of treatment.

Review date: This date will be when they need to see the ANP. 3 months after the patients last date of treatment. This date will match the Expected date.

Review comment: this should read exactly the same as the notes/comments box. (Copy and paste)

Appendix 5

ONCE THE PATIENT HAS ATTENDED THEIR ANP INDUCTION APPOINTMENT – HOW TO OUTCOME. (SOP section 3.2)

****If the patient is under both oncology and surgery Breast pathways you will need to add the patient onto the SMP pathway under the Breast consultant and speak with the Breast Navigator regards to the oncology pathway.**

Outcome ANP appointment:

On section ONE of Clinic Outcome form: “R1 – internal referral for same condition”

On section TWO of Clinic Outcome form: “SMP Consultant Partial Booking List”

Review Date: 1 week.

Add only 1 week after the patient was seen by the ANP under the Nurse referral only.

(systems will not allow more than 36 months and by adding 1 week it keeps consistency on all patients)

You will need to add in a comment: “SMP – Open access required – Navigator only”

****you will see the Breast Care Nurse referral is left open with a review date of 1 week, this is in case the patient needs to come back in to see the ANP whilst on SMP.**

- bring up the **Breast consultants referral** (this is the consultant who the patient had follow-up appointments with) and add the **Self-Managed Pathway** partial booking to this.
- **Set partial booking**
- **Appointment Duration:** Leave this as 0
- **Notes/comments:** SMP – under cons xx/Review on VMDT Date xx
- **Selected Scheduled:** You will need to select the correct SMP waiting list code.

SMP – BREAST
SMP-BREASTWL-SS (Mr Soumian)
SMP-BREASTWL-SJ (Dr Jafferbhoy)
SMP-BREASTWL-SN (Mr Narayanan)
SMP-BREASTWL-SM (Mr Marla)
SMP-BREASTWL-VG (Mr Gopalan)

Acknowledgment date: This is the date the patient saw the ANP and was added to the SMP Pathway.

- **Expected date:** This date will be written on the form by the ANP – Example VMDT August 2023.
- **Review date:** This is the same as the VMDT date – this date should match the expected date.
- **Review comment:** this should read exactly the same as the notes/comments box. (Copy and paste)
- **Acknowledgment letter:** “No” to sending out a letter.

You have now added the patient onto the BREAST Self-Managed Pathway.

Oncology SMP - Pass any paper work to the Macmillan Breast Care Navigator.

Oncology Consultant SMP codes
SMP-ONCBRWL-MS (Dr Sivaramalingam)
SMP-ONCWL-AP (Dr Jegannathen)
SMP-ONCWL-DG (Dr Gahir)
SMP-ONCWL-LE (Dr El-Helw)