

DCCR - Worklists (Portal Only)

Introduction

This guide relates to the use of worklists for Portal users. This facility is not available to Launch in Context users.

The Worklists function allows for the creation of personal worklists of patients/service users to enable quicker access to their records. Up to six worklists are available and up to 100 names can be added to each worklist.

Note that Worklists are only accessible to the users who created them and cannot be shared with other users.

Rename a Worklist

By default, worklists are labelled with colours, but it is advisable to rename worklists to reflect the purpose of the list.

To rename expand the Worklist menu item on the right hand side of the screen and select the Rename item.

Devon & Cornwall Care Record

RECORDS
Person Search
Recently Accessed

WORKLISTS
Red
Orange
Yellow
Green
Blue
Purple

PATIENTS

Red Rename

<input type="checkbox"/>	NHS Number	Name	Gender	Born (Age)	
<input type="checkbox"/>	999 050 8453	XXTESTPATIENT-TBDP, Donotuse	Male	22-Apr-2001 (21 years)	-
<input type="checkbox"/>	999 000 0174	XXTESTPATIENTAAUK, EBS-DoNotUse	Male	06-May-1901 (120 years)	-

Remove None selected

Showing 2 of 2

Display worklist on summary page

As well as being able to access worklists from the left-hand menu worklists can be added to the home page for even faster access.

To enable a specific worklist to be displayed on the home page click on the down-arrow alongside the username and select User Settings.

Devon & Cornwall Care Record

RECORDS
Person Search
Recently Accessed

WORKLISTS
MESSAGING

Recently Accessed

Last 12 Months

<input type="checkbox"/>	NHS Number	Name	Gender	Born (Age)
<input type="checkbox"/>	485 337 9371	JORDAN, Sarah	Female	21-Aug-1922 (95)
<input type="checkbox"/>	642 456 1811	WILKINSON, LINDA	Female	04-Feb-1939 (85)
<input type="checkbox"/>	-	MOON, Howard	Male	04-May-1968 (55)
<input type="checkbox"/>	822 567 6149	ROBERTS, Alice	Female	03-Mar-1965 (55)
<input type="checkbox"/>	732 137 1425	FITZGERALD, Robert	Male	13-Jan-1981 (41)
<input type="checkbox"/>	-	BENNION, EDWARD STEVEN	Male	02-Mar-1995 (28)

Remove None selected

Showing 6 of 6

My Worklist

Red Rename

NHS Number	Name
There are no items to display.	

Remove None selected

Username LOGOUT

User Settings

Help

ORION HEALTH

From the settings screen click on the magnifying glass alongside Worklists to Show on My Homepage and select the worklist, or worklists, that you would like to show.

Users	
E-mail	<input type="text" value="Username"/>
Practitioner	
Specialty	<input type="text" value="Q"/>
Organization Name	<input type="text"/>
Provider Homepage	
Worklist to show on My Homepage	<input type="text" value="Q"/>
User Attributes	
Job Title	<input type="text"/>
<input type="button" value="Update Preferences"/> <input type="button" value="Discard Changes"/>	

Users

E-mail Username Organization

Practitioner

Specialty

Organization Name

Provider Homepage

Worklist to show on My Homepage

User Attributes

Job Title

Display Name

Red

Blue

Purple

Orange

Yellow

Green

Update Preferences Discard Changes

The image shows a web interface for user management. On the left, there are several form sections: 'E-mail' with a 'Username' field, 'Practitioner' with a 'Specialty' dropdown and 'Organization Name' field, 'Provider Homepage' with a 'Worklist to show on My Homepage' dropdown, and 'User Attributes' with a 'Job Title' field. A modal dropdown menu is open over the 'Username' field, showing a list of color options: 'Red', 'Blue', 'Purple', 'Orange', 'Yellow', and 'Green'. At the bottom of the page, there are two buttons: 'Update Preferences' and 'Discard Changes'.

Add Record to Worklist

To add a patient/client to a Worklist open the record to add and then click on the small + tab to left of the patient/client name in the banner and then select the appropriate worklist.

JORDAN, Sarah (MRS)
 DOB 21-Aug-1922 (99y) GENDER Female
 Red odgara Way Liske... HOME 01752445566
 Blue y
 Yellow ts
 Green All As Read
 Orange Sort By Date
 Purple cs
 Data Quality Feedback
 Send Feedback
 There are no items to display

Events & Appointme
 10 items
 All GP Hosp M
10 0 10
 2021

Remove Record from Worklist

To remove a record, select the record by clicking in the box to the left of the patient/client name and then click on the Remove button.

My Worklist

Red [Rename](#)

<input type="checkbox"/>	NHS Number	Name	Gender	Born (Age)
<input checked="" type="checkbox"/>	485 337 9371	JORDAN, Sarah	Female	21-Aug-1922 (101 y)

1 selected

Showing 1 of 1

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Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=245>