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.

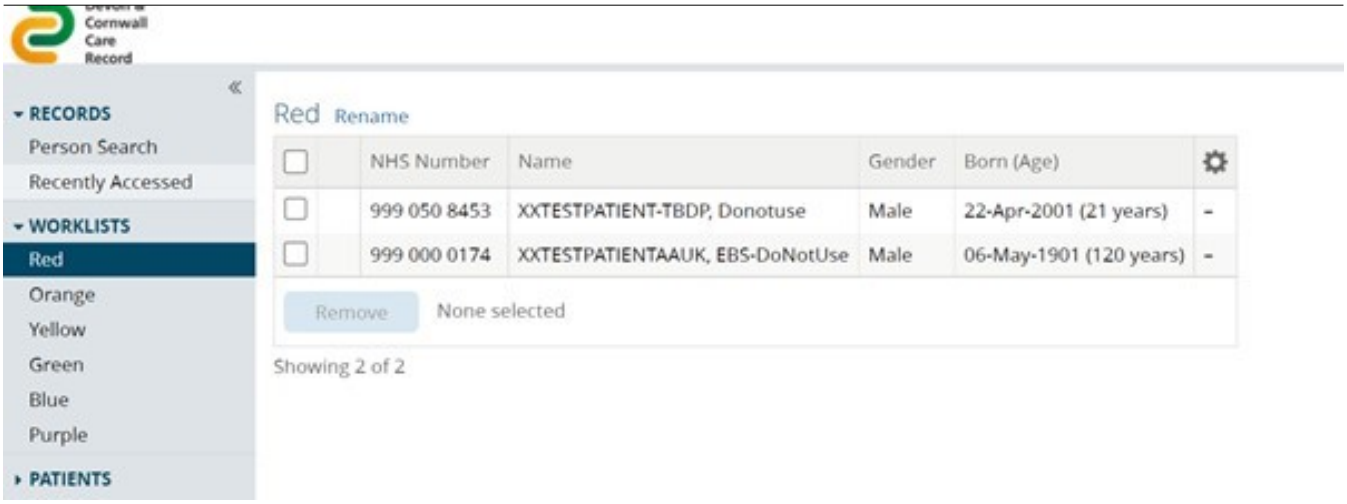
The Worklists function allows for the creation of personal worklists of patients/service users to enable quicker access to their records. Up to six worklists are available and up to 100 names can be added to each worklist.

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.

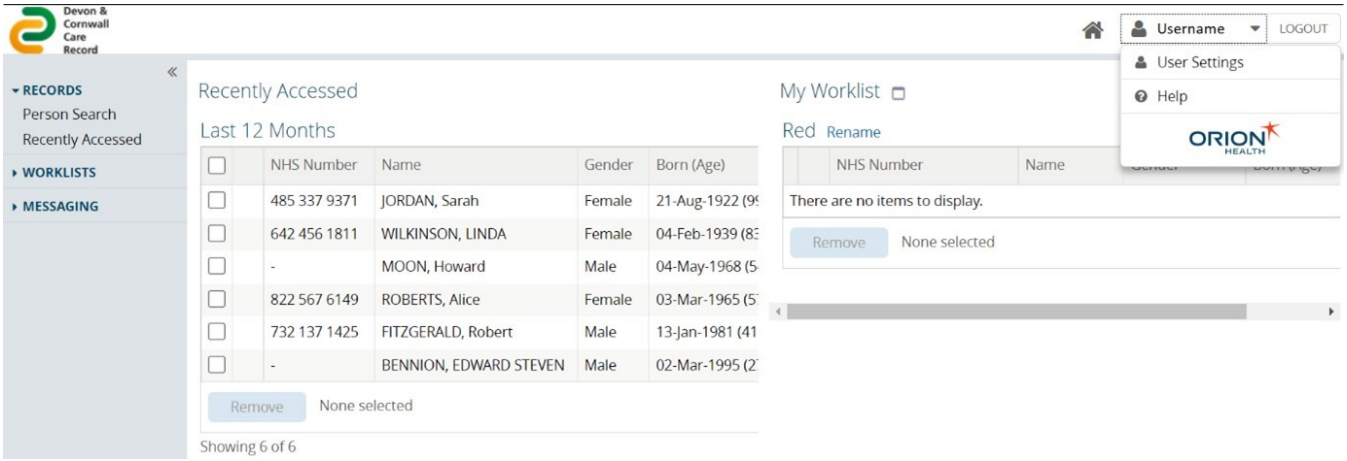
To rename expand the Worklist menu item on the right had side of the screen and select the Rename item.



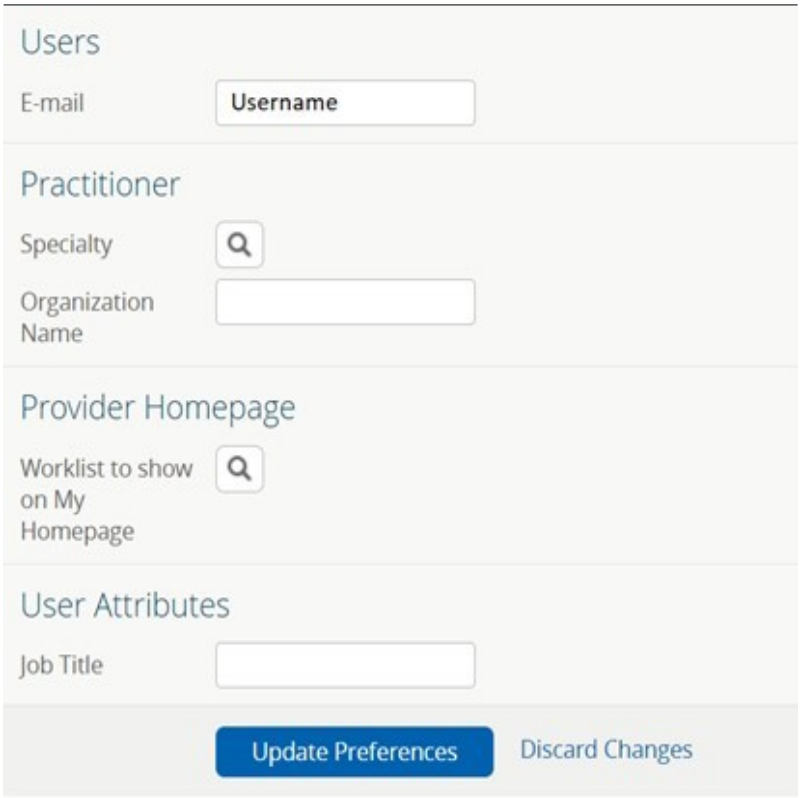
Display worklist on summary page

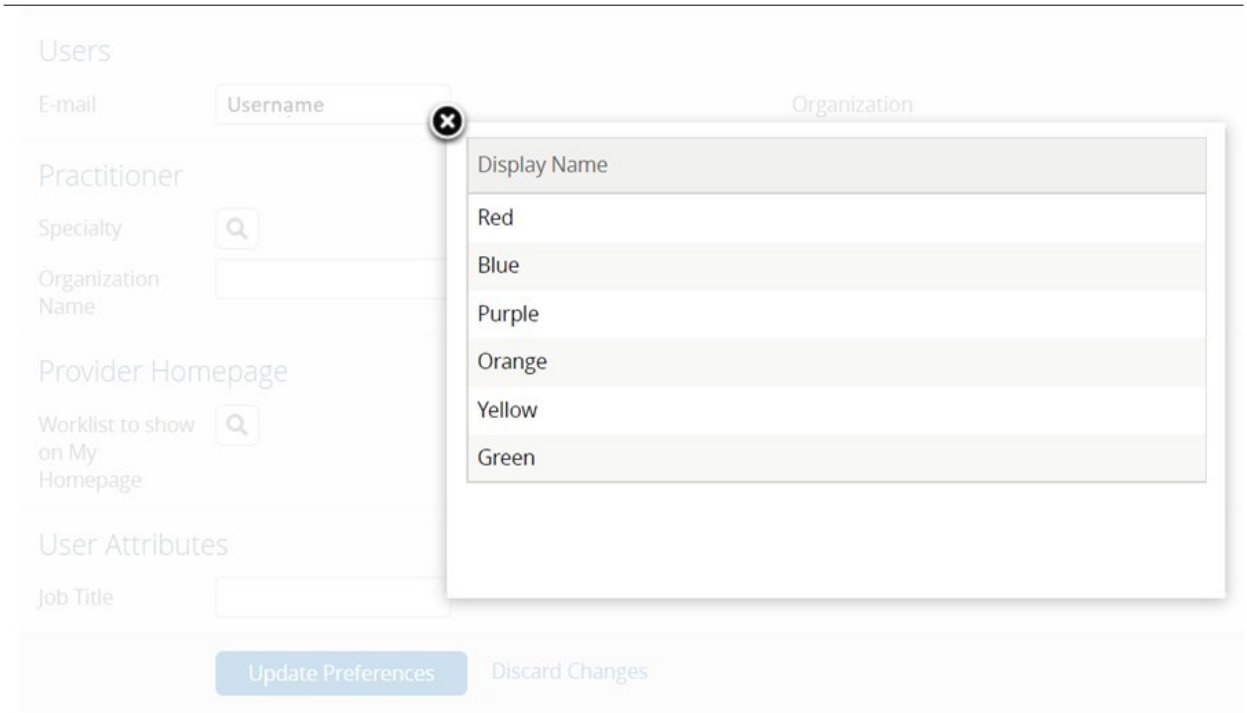
As well as being able to access worklists from the left-hand menu worklists can be added to the home page for even faster access.

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



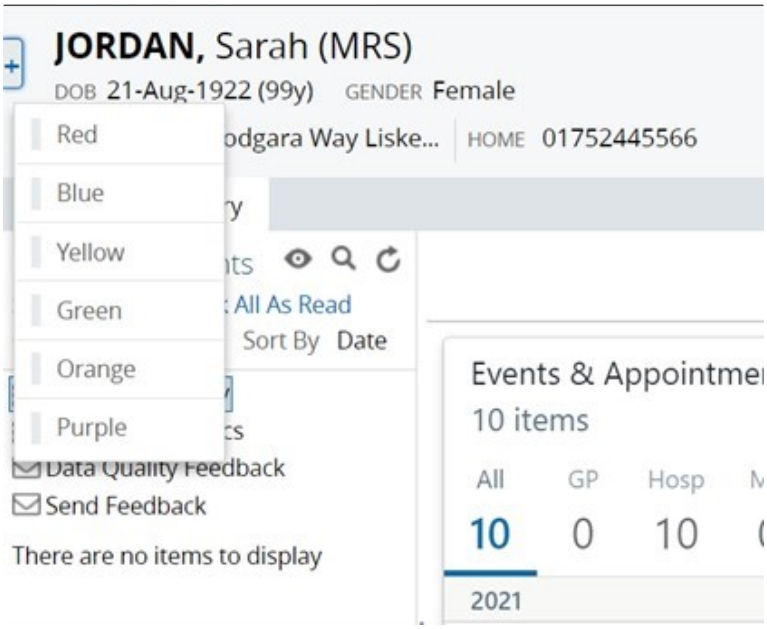
From the settings screen click on the magnifying glass alongside Worklists to Show on My Homepage and select the worklist, or worklists, that you would like to show.





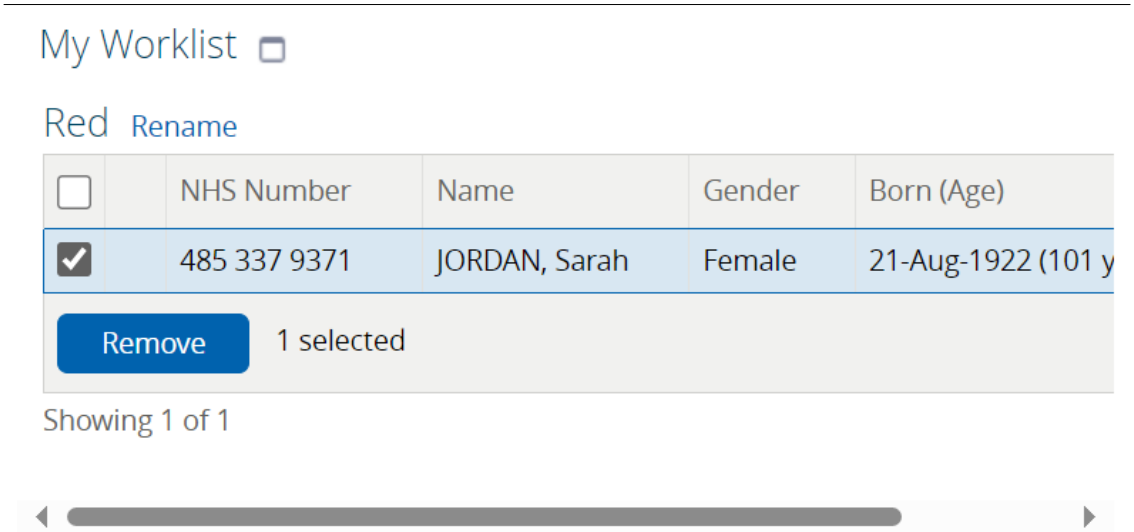
Add Record to Worklist

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.



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.



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