



Electronic Document and Records Management System (EDRM)

Letters Module

User Guide

CCube Solutions | 13 Diamond Court | Opal Drive | Milton Keynes | MK15 0DU Main Office: +44 (0)1908 677752 | Fax: +44 (0)1908 679444 | Web: www.ccubesolutions.com

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2 Revisions and Distribution

Revision	Summary of Changes	Author	Date
1	Initial creation of document	Chris Rothwell	27/05/2015
..	Various updates not shown in this list.	Various	Various
4.0	Content optimised for use at MKUH	Andrew Phelps	11/01/2019

3 Introduction

The CCube EDRM system Letters Module automates the creation of letters by using patient and document data. Letters can be created independently or associated with a specific patient or patient appointment.

4 Creating a Letter

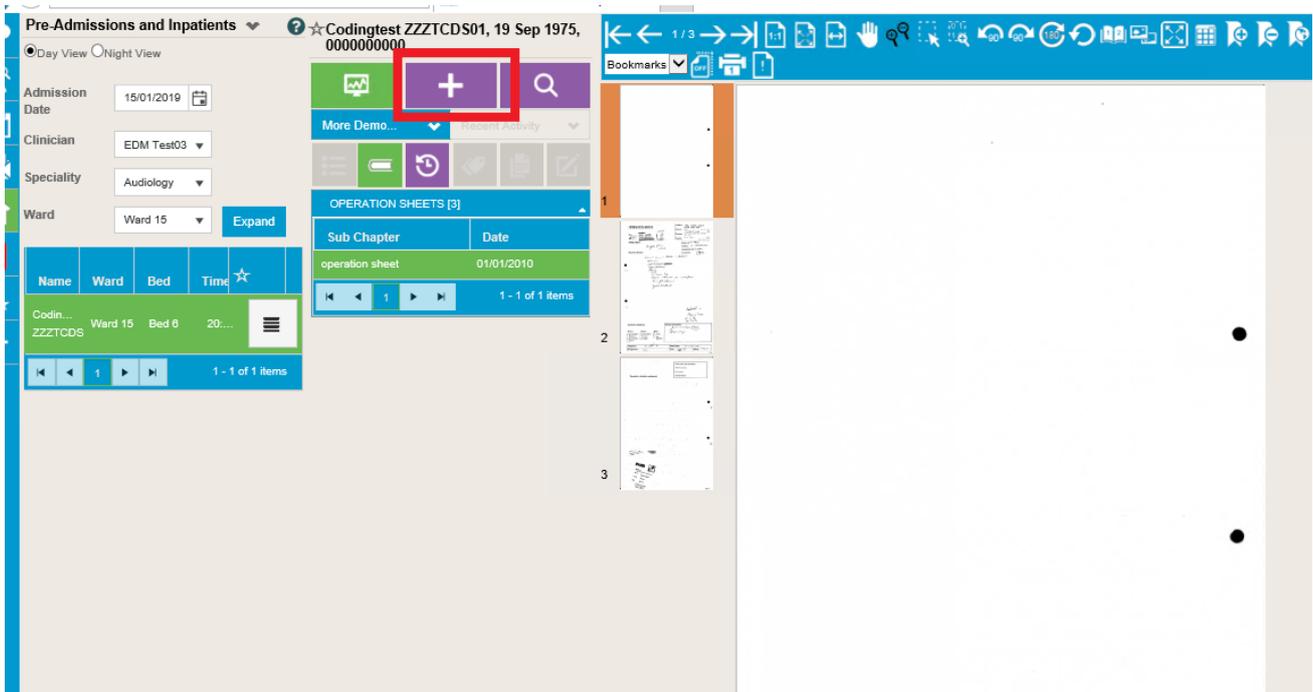
There are several types of letter that can be created within the EDRM the most common are:

1. Appointment Letter – The letter created is based upon an outpatient appointment.
2. Adhoc Letter – Ad-hoc letters can be created either for a selected patient or independently of any data in the system.

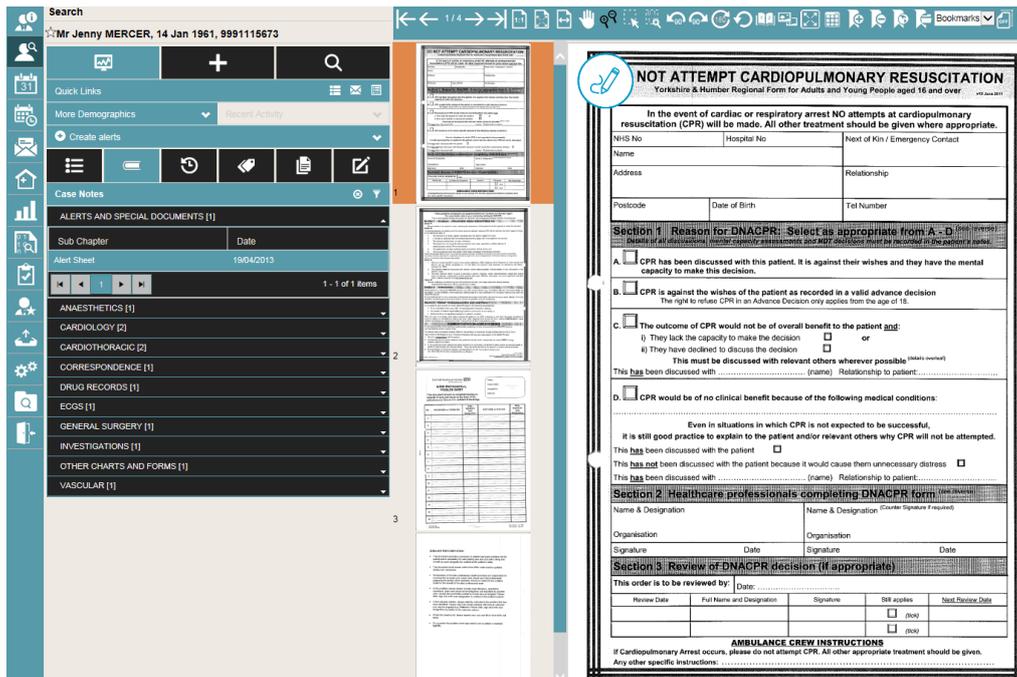
Letters can be created in the following ways;

- View a patient appointment and the corresponding case note
- View a patient admission and the corresponding case note
- Search for the patient and view the patient case note

When the patient case note is displayed, to create a letter click this button;



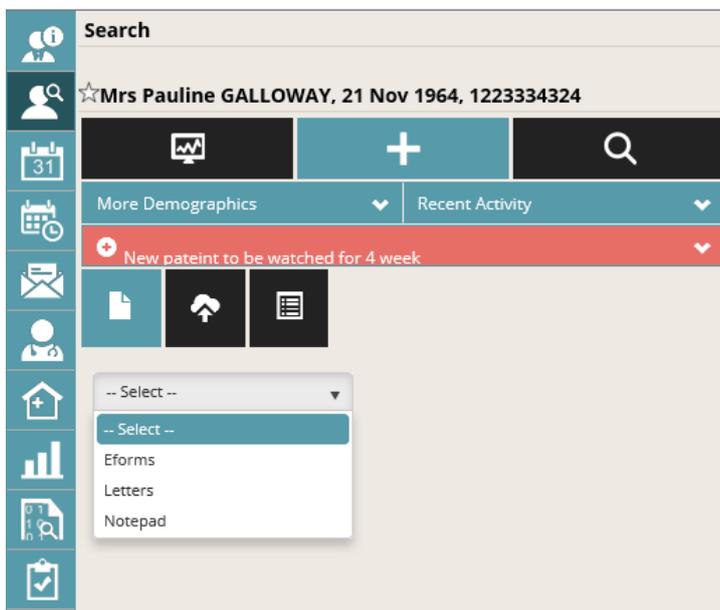
To create a letter, the Electronic Health Record for the patient must first be displayed. For details of how to display patient details please refer to user guides for patient search  or Appointments.



To initiate the letter creation process, click the “Create”. This appears as a large “plus” icon in the tab list at the top of the patient electronic health record.

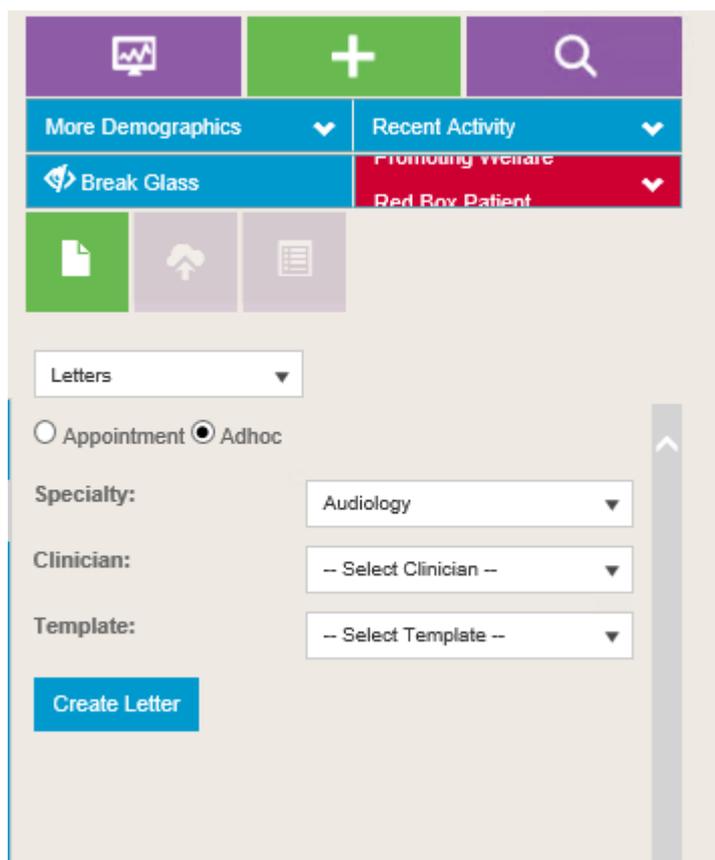


Once selected the non-viewer parts of page will be hidden and a dropdown list will be provided.



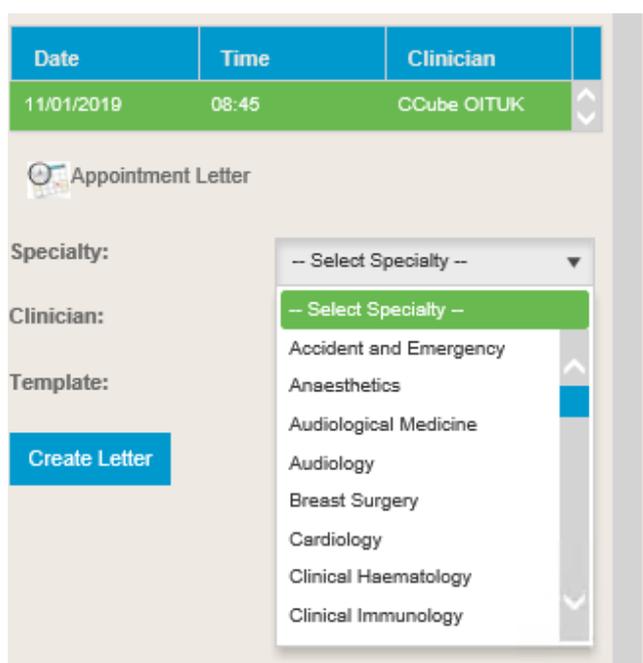
From the dropdown list select “Letters”.

After you have selected letters the screen will change to what you see below;



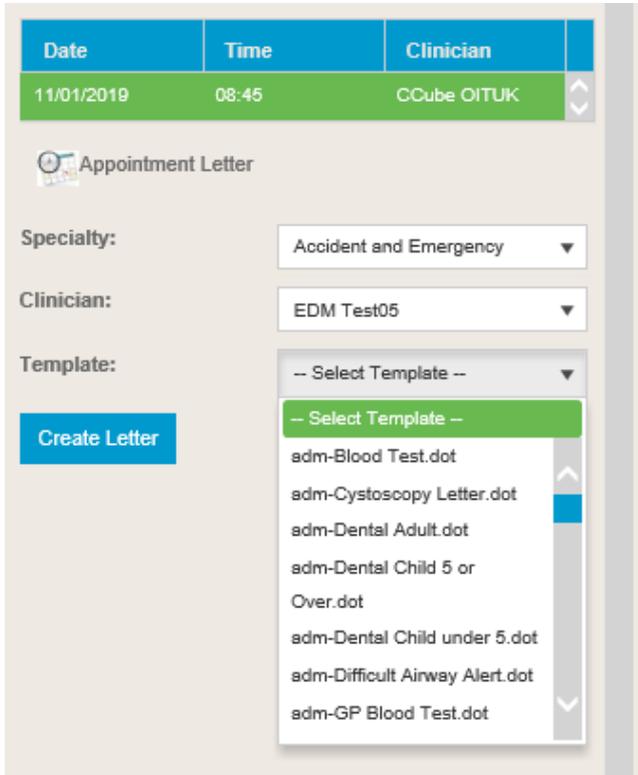
The Template dropdown provides a list of pre-defined templates that define the content and appearance of the letter to be created.

Select a Specialty to display a list of Clinicians having that Specialty, and a list of letter templates created for that Specialty.



Selecting a Clinician will include where appropriate the details of that Clinician within the created letter.

Select the appropriate template for the required Letter.



Date	Time	Clinician
11/01/2019	08:45	CCube OITUK

Appointment Letter

Specialty: Accident and Emergency

Clinician: EDM Test05

Template: -- Select Template --

- Select Template --
- adm-Blood Test.dot
- adm-Cystoscopy Letter.dot
- adm-Dental Adult.dot
- adm-Dental Child 5 or Over.dot
- adm-Dental Child under 5.dot
- adm-Difficult Airway Alert.dot
- adm-GP Blood Test.dot

Create Letter

After selecting a template, if there are any data fields for that template the list of data fields will be displayed.

Appointment Adhoc

Date	Time	Clinician
11/01/2019	08:45	CCube OITUK

Appointment Letter

Specialty:

Clinician:

Template:

Consultant:

Specialty:

Admission date:

Time:

Report to:

Hub:

Number:

The data fields can be left blank if required, and any data added whilst the letter is being edited.

Alternatively, enter the data values into this form, and they will be included in the letter when it is displayed;

Date	Time	Clinician
11/01/2019	08:45	CCube OITUK

Appointment Letter

Specialty:

Clinician:

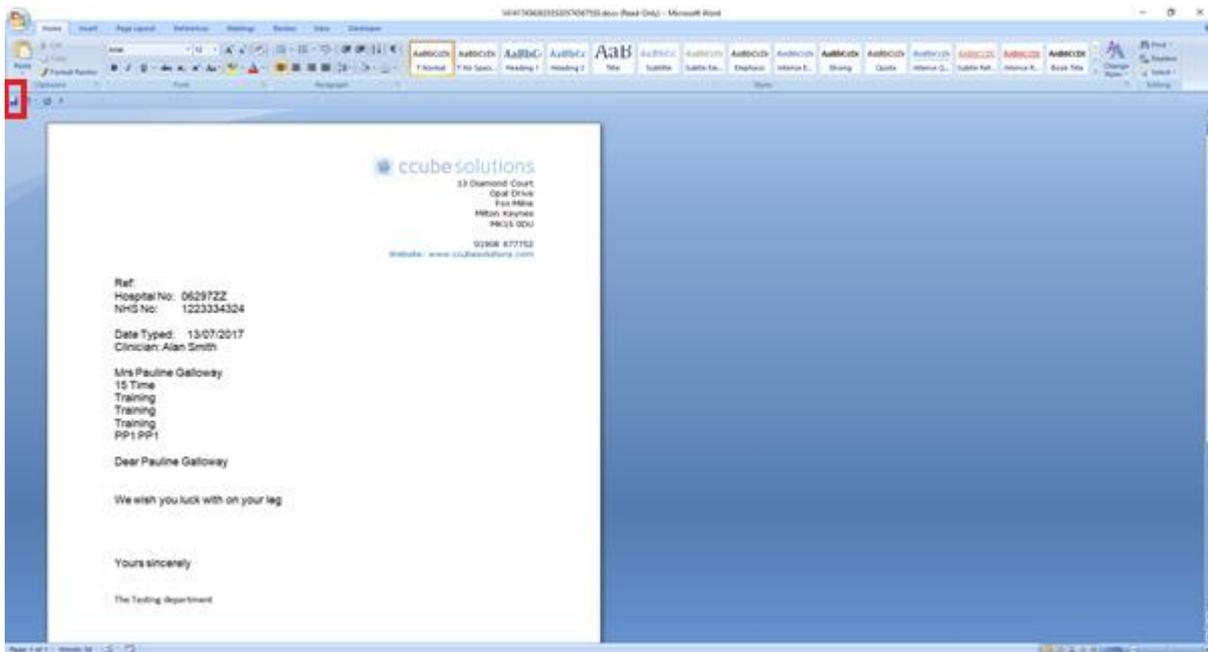
Template:

Week commencing:

Telephone number:

Hub:

A Microsoft Word Document will be created.



To save the document press the “Save” button, as highlighted above.

Alternatively, click File > Save.

Then close the word document. The letter will appear in the patient letters list for further action.

5 Letters Module

The letters module can be accessed by clicking on the letters menu icon.



5.1 Filtering the Letters list

The letters filter will as a default show the status “-- Active --”. This will show all letters that require attention.

Letters ▲

Appointments Adhoc Letters

Clinician: Charles Bucket
 Appointment Date: 10/12/2018
 AM/PM: Both
 Clinic: Dermatology
 Status: -- Active --
 Change Status: CREATED Update

	Hospital Number	Name	Letter Type	Create Date	Created By	Status	
<input type="checkbox"/>	5237541E	Faith Constance	CCubeDemoTest	10/12/2018 10:58	Charles Bucket	CREATED	
<input type="checkbox"/>	5202718X	Smith Brandon					
<input type="checkbox"/>	1433105N	Stacy Joan					
<input type="checkbox"/>	1060390N	Derek Dominic					
<input type="checkbox"/>	5237541E	Faith Constance					
<input type="checkbox"/>	1058889T	Thomas Jenny					
<input type="checkbox"/>	5237541E	Faith Constance					
<input type="checkbox"/>	5202718X	Smith Brandon					
<input type="checkbox"/>	1433105N	Stacy Joan					
<input type="checkbox"/>	1060390N	Derek Dominic					

1 - 10 of 10 items

Selecting any of the dropdown options will filter the list of letters. When viewing the Appointment Letters tab the list can be filtered by any of the following; Appointment Date, Clinician, Clinic and letter status. For Ad-hoc letters the list can be filtered by Clinician, and letter status.

5.2 Letter Statuses

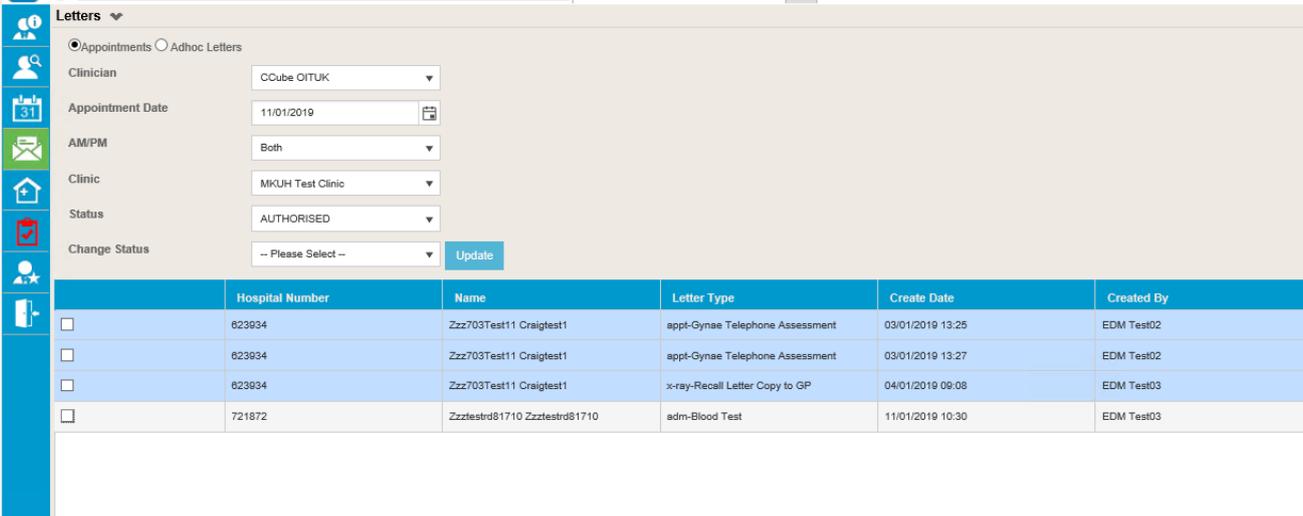
Newly created letters are assigned the “Created” status. The letter status indicates the current state of the document in relation to the document lifecycle.

A full list of the available statuses is included below.

- **Created.** The first stage of the workflow.
- **Created in Error.** If a letter is mistakenly created, the user can set the status and the letter will be hidden from the user. Only a letter with a status of Created can be changed to Created In Error.
- **Authorised.** A letter has been typed by the secretary and seen by the consultant.
- **Draft.** The letter has been created but is not considered completed.
- **Rejected.** The letter has not been approved and has been rejected by the consultant and amendments are required.
- **Sent.** The letter has been sent to the patient. This action transfers the Letter into the Patient’s case note where it can be viewed by all users.

5.3 Changing the status of a Letter

When using the Letters module, use the filters to display a list of letters for a given Clinician or Clinic;



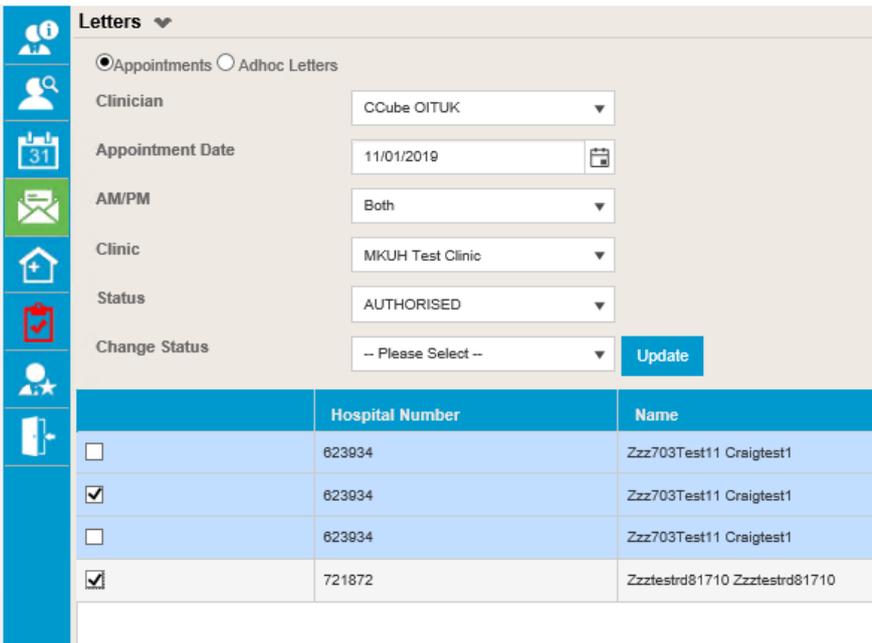
The screenshot shows the 'Letters' module interface. On the left is a navigation sidebar with icons for home, search, calendar, mail, and other functions. The main area has a filter section with the following settings:

- Appointment Type: Appointments (selected)
- Clinician: CCube OITUK
- Appointment Date: 11/01/2019
- AM/PM: Both
- Clinic: MKUH Test Clinic
- Status: AUTHORISED
- Change Status: -- Please Select --

 Below the filters is a table of letters with the following data:

	Hospital Number	Name	Letter Type	Create Date	Created By
<input type="checkbox"/>	623934	Zzz703Test11 Craigtest1	appt-Gynae Telephone Assessment	03/01/2019 13:25	EDM Test02
<input type="checkbox"/>	623934	Zzz703Test11 Craigtest1	appt-Gynae Telephone Assessment	03/01/2019 13:27	EDM Test02
<input type="checkbox"/>	623934	Zzz703Test11 Craigtest1	x-ray-Recall Letter Copy to GP	04/01/2019 09:08	EDM Test03
<input type="checkbox"/>	721872	Zzzlestrd81710 Zzzlestrd81710	adm-Blood Test	11/01/2019 10:30	EDM Test03

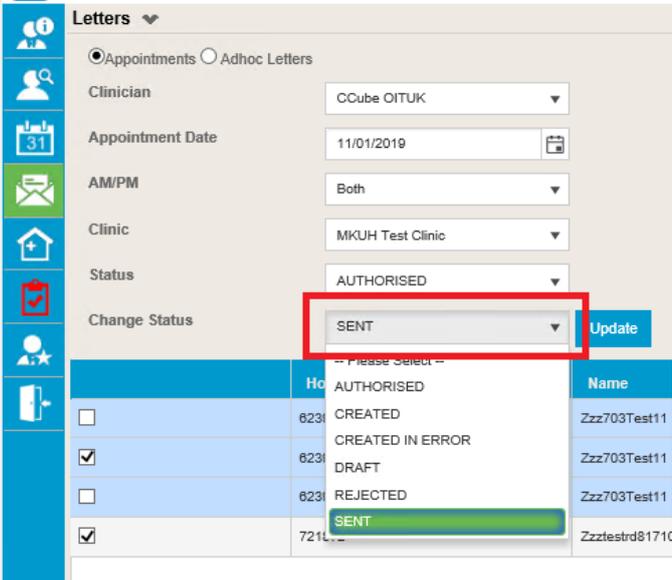
You can change the status of a batch of letters by clicking the tick-box for the letter or letters for which you are going to change the status.



This screenshot shows the same 'Letters' module interface as above, but with the 'Change Status' dropdown menu open, showing the option '-- Please Select --'. In the table below, the second and fourth rows are selected, indicated by checked checkboxes in the first column:

	Hospital Number	Name
<input type="checkbox"/>	623934	Zzz703Test11 Craigtest1
<input checked="" type="checkbox"/>	623934	Zzz703Test11 Craigtest1
<input type="checkbox"/>	623934	Zzz703Test11 Craigtest1
<input checked="" type="checkbox"/>	721872	Zzzlestrd81710 Zzzlestrd81710

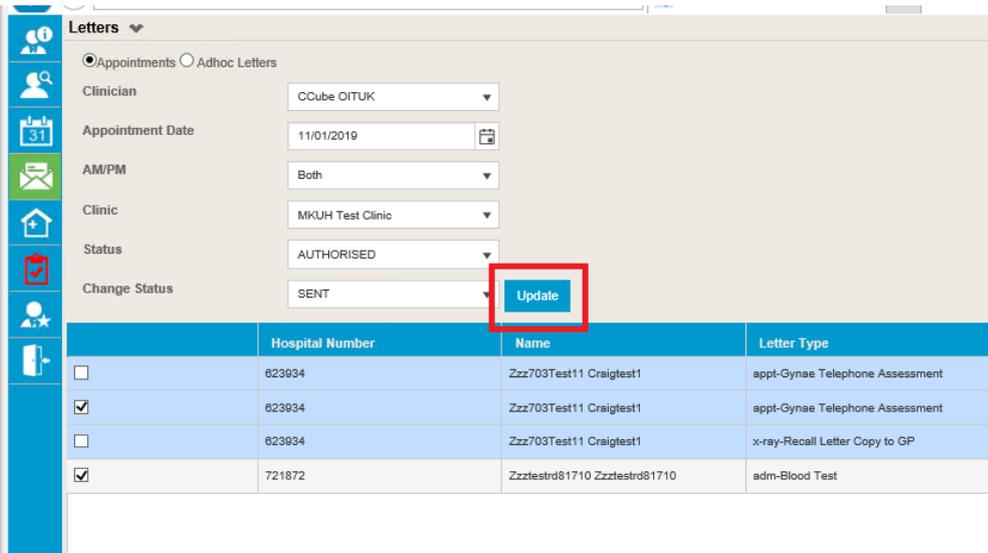
Then set the “Change status” dropdown to the status that the letters will be changed into;



The screenshot shows the 'Letters' module interface. The 'Change Status' dropdown menu is open, and 'SENT' is selected. The 'Update' button is highlighted in blue.

Change Status	Update
SENT	Update

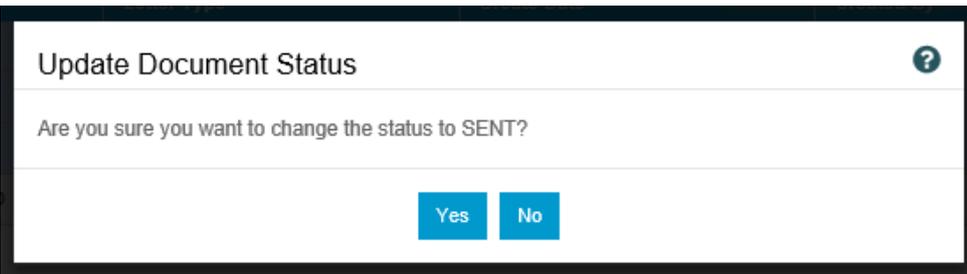
Then click the “Update” button;



The screenshot shows the 'Letters' module interface. The 'Update' button is highlighted in blue.

Change Status	Update
SENT	Update

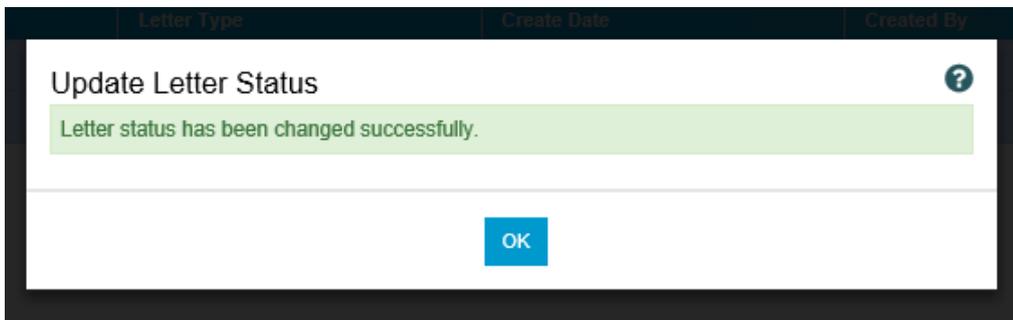
A confirmation window will be displayed;



The screenshot shows a confirmation window titled 'Update Document Status'. The window asks 'Are you sure you want to change the status to SENT?' and has 'Yes' and 'No' buttons.

Click “No” to abort the update. Click “Yes” to continue.

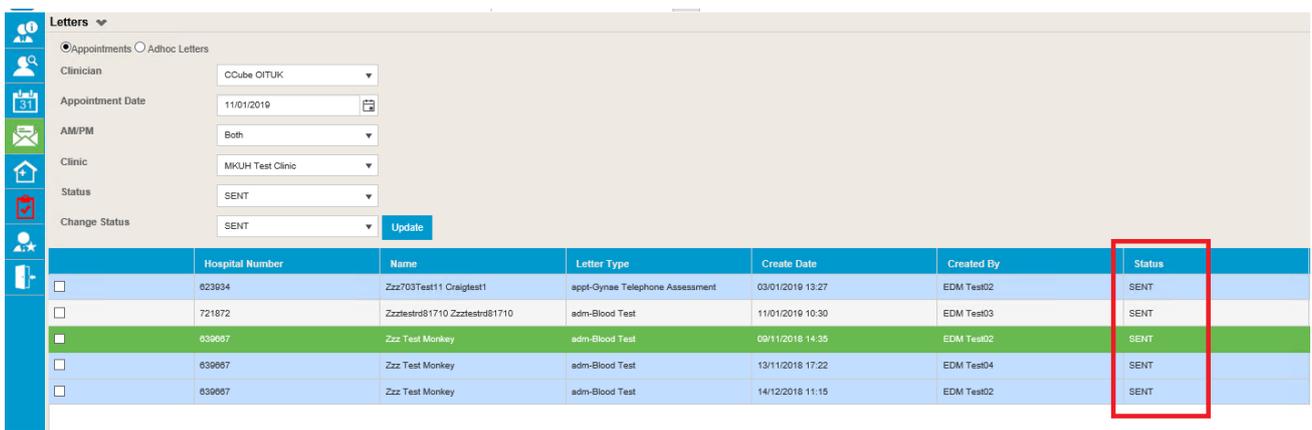
When the update is completed, a confirmation window will be displayed;



The updated letters will disappear from the displayed list;



You can verify the status change by changing the “Status” filter to the new status (eg. “Sent”) and seeing that the letters have the new status.



When a letter is given the “Sent” status, it will become visible in the patient case note.