ccube solutions

Electronic Document and Records

Management System (EDRM)

My Patients/Favourites Module

User Guide

1 Contents

2 Revisions and Distribution

Revision	Summary of Changes	Author	Date
0.1	Initial creation for 4.2	Michael Robertson	16/01/2018
…	…	…	…
2.0	Content optimised for MKUH	Andrew Phelps	15/01/2019

3 Purpose

The EDRM system "My Patients" module enables a user to create shortlists of patients. The My Patients module is frequently referred to as the "Favourites" module.

4 User Guide

The "My Patients" module is opened by clicking the following option in the left side menu;
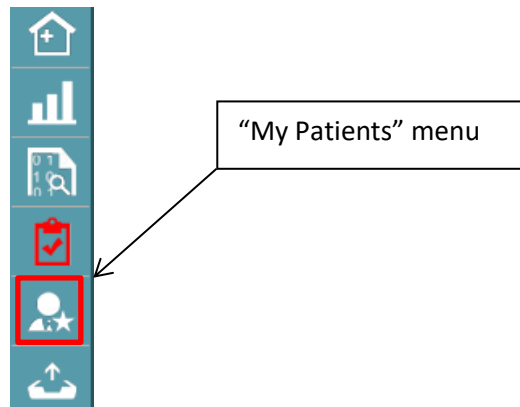
"My Patients" menu

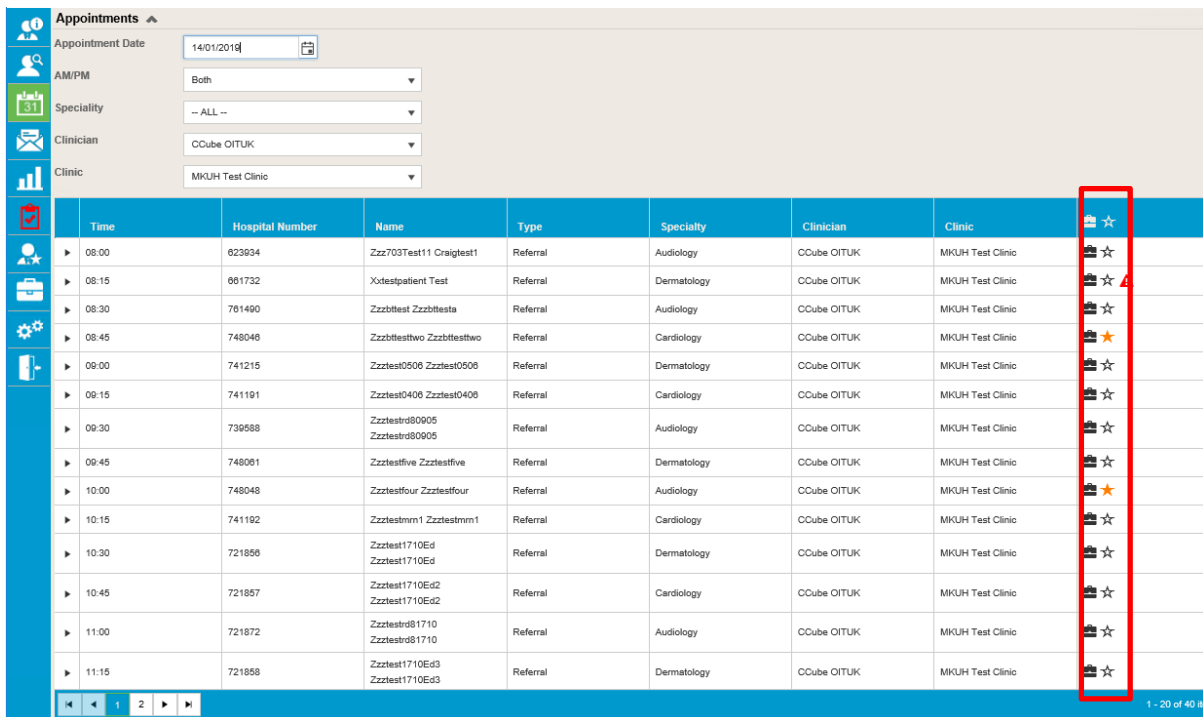The Favourites list will appear as follows;

4.1 Adding and Deleting from "My Patients"

A patient can be added to the My Patients list by clicking the "star" icon on the Search, Appointments or Admissions pages;

When the Favourites icon is ticked it will change to yellow to indicate the patient has been added to the current My Patients list.

Hosp No	Name	NHS Number	Date Of Birth	Address	G.P	Practice	
▶ 1315251H	Mrs Pauline CUDDY	1766098320	21 Nov 1964	15 Time Training Training Training PP1 PP1			★
▶ 999999A	Mrs Pauline DANIELS	1144462929	21 Nov 1964	15 Time Training Training Training PP1 PP1			★
▶ 1190867X	Mrs Pauline DONALDSON	4762521744	21 Nov 1964	15 Time Training Training Training PP1 PP1			★
▶ 06297ZZ	Mrs Pauline GALLOWAY	1223334324	21 Nov 1964	15 Time Training Training Training PP1 PP1			★
▶ 111111A	Mrs Pauline GLORTER	7879209280	21 Nov 1964	15 Time Training Training Training PP1 PP1			★
▶ 1220340V	Mrs Pauline GRIFFITHS	4407899026	21 Nov 1964	1 Toto Wad Wad Townsfilldon Exexex TT1 7TH			☆
▶ 123456B	Mrs Pauline JAMES	4446883640	21 Nov 1964	15 Time Training Training Training PP1 PP1	David Smith	CCube Solutions GP Practice	☆
▶ 123456A	Mrs Pauline SMITH	4986883640	21 Nov 1964	15 Time Training Training Training PP1 PP1			☆

A patient can also be marked as a Favourite from within the patients Electronic Health Record page;

4.2   Creating Favourites Lists

The 'My Favourites' functionality allows users to save lists of patients.

To create a Favourites list the user types in a name of the list they want to create and clicks the Add button.
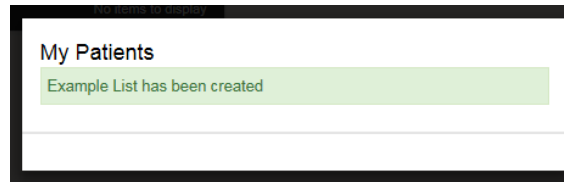
Important
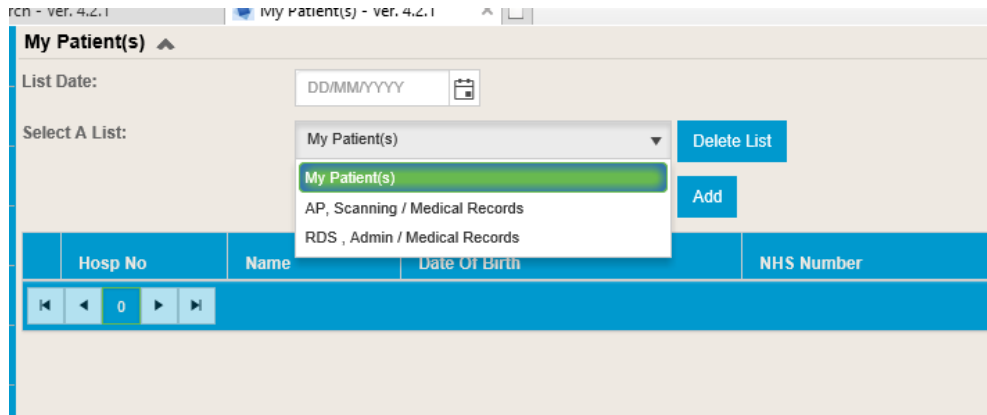The name of a Patient List will have the following format;

Your initials , area / department

When Add is clicked, then all the patients currently shown as Favourites will immediately be stored into the new Favourites list & disappear from the temporary My Patients list.
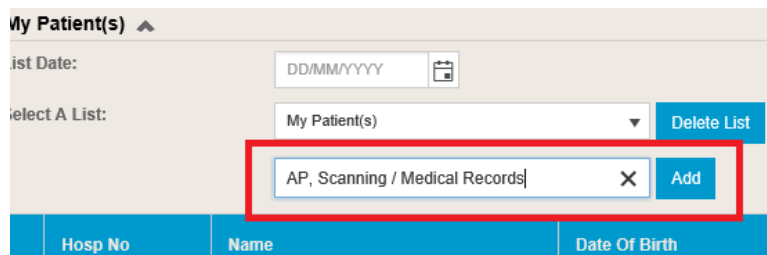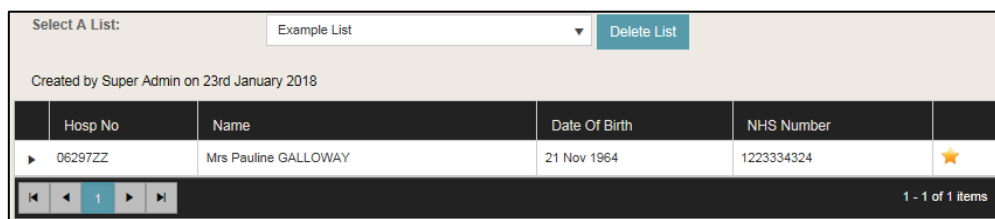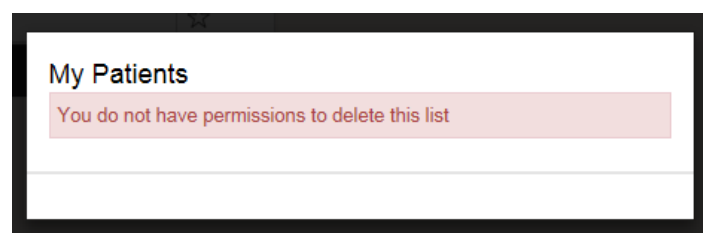
Below is an example of the new Favourites list after being created;

When selecting a Favourites list the creator of the list and date it was created is also displayed.

A user can only delete Favourites lists they have created. If they attempt to delete another users Favourites list they will see the following message;

4.3   Managing Favourites Lists

The creator of a Favourites list can manage the Favourites list by using the **remove** and **copy to** function.

To remove a Favourites list you must first display the required list. Then click "Delete List".

To remove a patient from a Favourites list the patient must be selected. Then click the "Remove" button.

To copy a patient to another Favourites list the patient must be selected. Then select the appropriate list name from the "Copy To" dropdown. Then click the "Copy" button.

A confirmation message will be displayed.

If "Yes" is clicked then a further confirmation message is displayed.