



## **CCube EDM 4**

CCube4.2PUG - Task Letters User Guide.doc

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](http://www.ccubesolutions.com)

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## 2 Revisions and Distribution

### Revisions

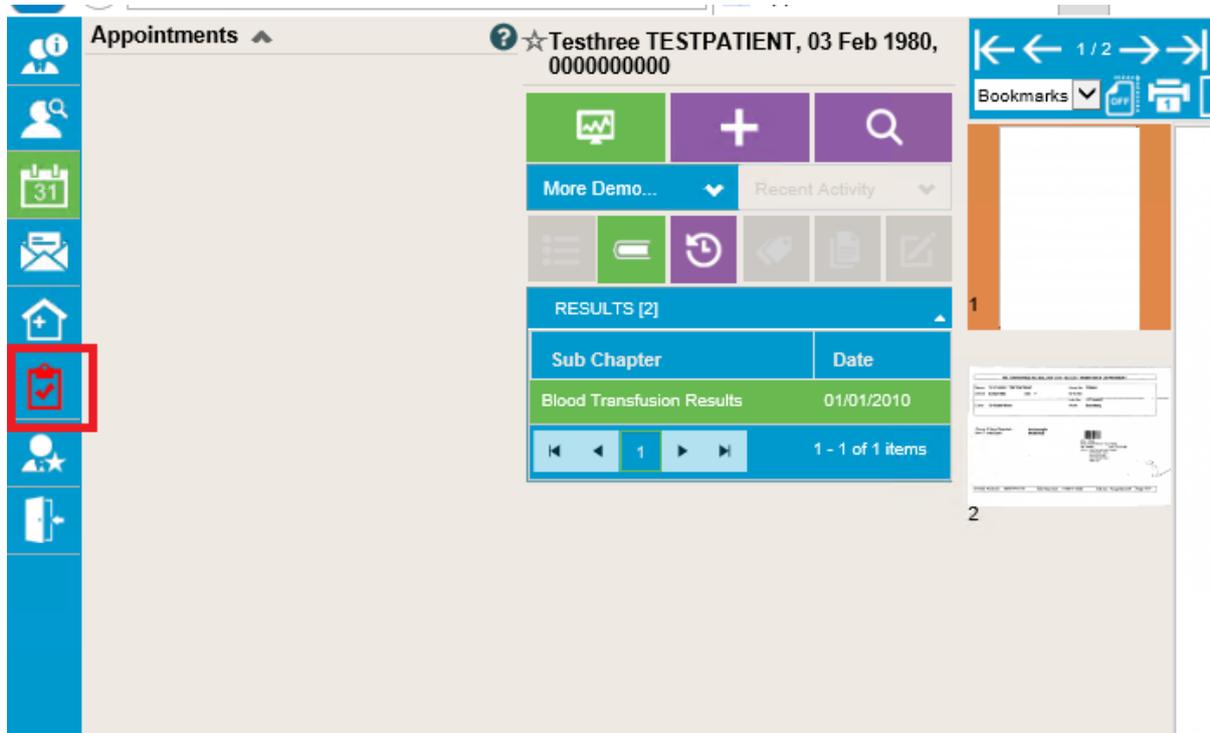
Revision	Summary of Changes	Author	Date
0.1	Initial creation of document	Paul Glock	24/04/2015
...	...	...	...
2.0	Content optimised for MKUH	Andrew Phelps	16/01/2019

### 3 Introduction

When working with Letters, the Task page provides a list of letters where action is required.

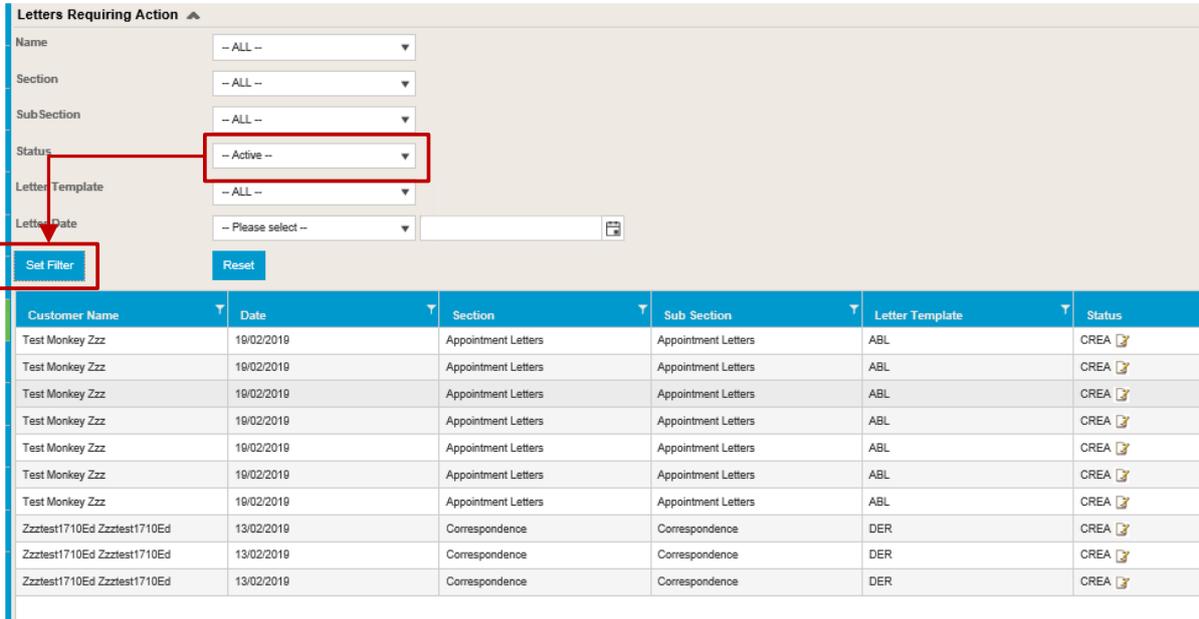
### 4 Opening the Letters Task List

The Task List is opened by clicking the Task icon on the left menu, and then clicking the “Letters” option;



## 4.1 Filtering the Letters list

The letters filter will as a default show the status “ALL”. Change the status to “-- Active --” and click “Set Filter”. This will show all letters that require attention;



Customer Name	Date	Section	Sub Section	Letter Template	Status
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA 
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA 
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA 

Selecting any of the dropdown options will filter the list of letters. The list can be filtered by any of the following; Patient Name, Casenote Section, Case-note Sub-Section, Letter Status, Letter Type and by the Letter creation date.

## 4.2 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.

### 4.3 Changing the status of a Letter

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

Customer Name	Date	Section	Sub Section	Letter Template	Status
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA

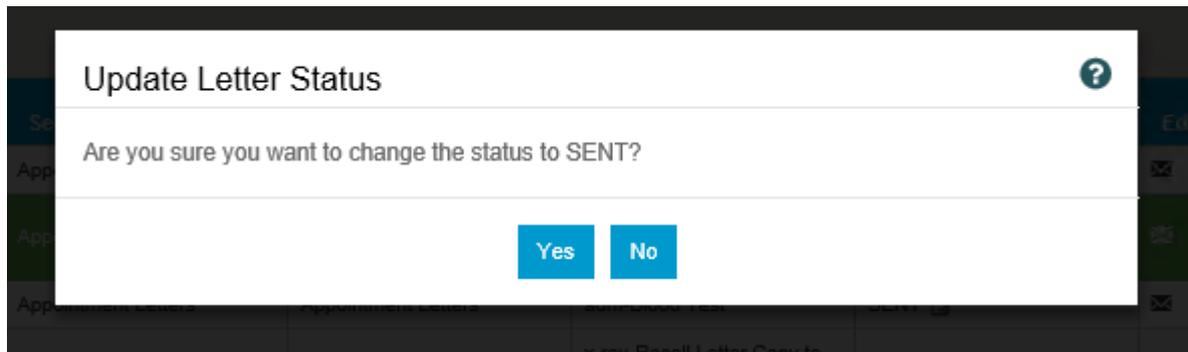
You can change the status of a letter by clicking the pen icon;

Customer Name	Date	Section	Sub Section	Letter Template	Status
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA

Select the status that the letter will be changed to;

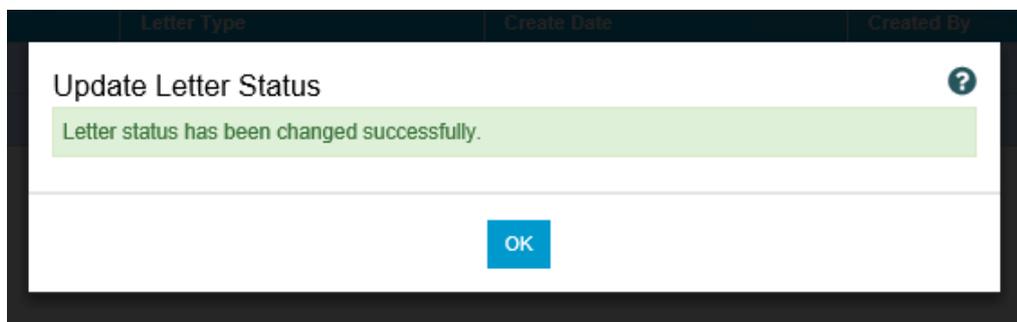
Customer Name	Date	Section	Sub Section	Letter Template	Status
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA
Zzztest1710Ed Zzztest1710Ed	13/02/2019	Correspondence	Correspondence	DER	CREA

A confirmation window will be displayed;

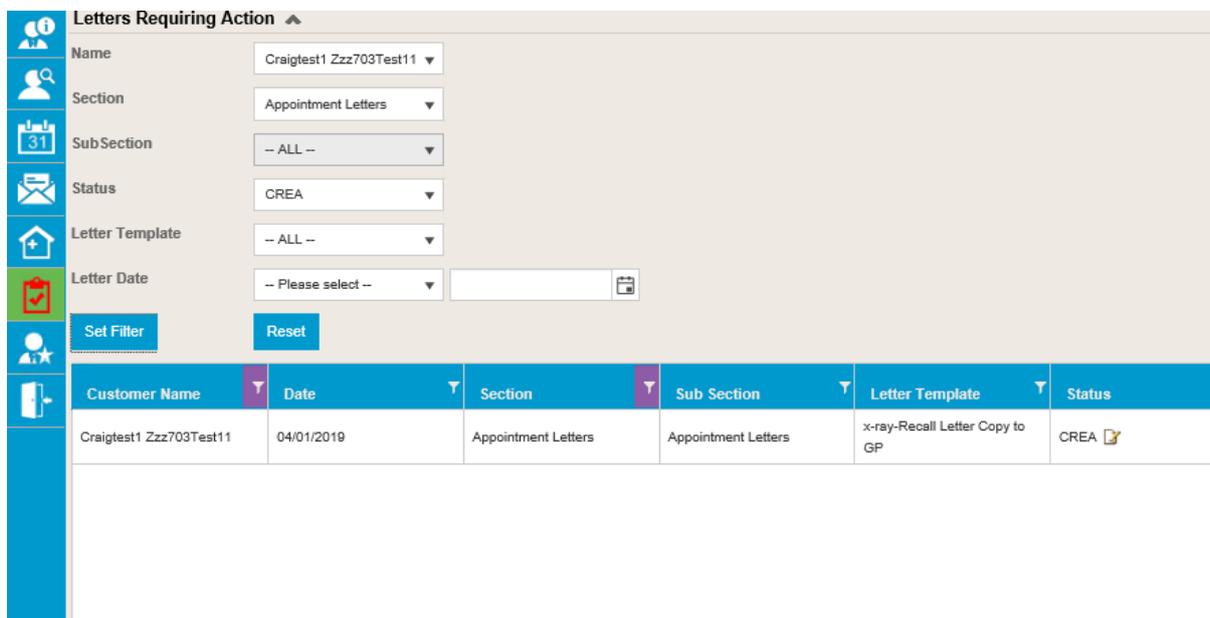


Click "No" to abort the update. Click "Yes" to continue.

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



The updated letters will disappear from the displayed list;



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