



# CCube EDRM 4

CCube4.2PUG - Task Letters User Guide.doc

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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

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## **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;

Letters Requiring Action 🔺					
Name	- ALL - 🔻				
Section	- ALL 🔻				
SubSection	ALL 🔻				
Status	Active 🔻 🔻				
Letter Template	-ALL-				
LetterDate	Please select				
	• Flease select •• •	Lel			
Set Filter	Reset				
Customer Name	Y Date	T Section T	Sub Section	Letter Template	Status
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 🍞
Test Monkey Zzz	10/02/2010	Ann aintean til attant	Annal-terret Latterr		
	18/02/2019	Appointment Letters	Appointment Letters	ABL	CREA 📝
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREA
Test Monkey Zzz Test Monkey Zzz	19/02/2019 19/02/2019 19/02/2019	Appointment Letters Appointment Letters	Appointment Letters Appointment Letters Appointment Letters	ABL ABL	CREA 🕃 CREA 🕃 CREA 🕃
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz	18/02/2019 18/02/2019 19/02/2019 18/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters	Appointment Letters Appointment Letters Appointment Letters Appointment Letters	ABL ABL ABL ABL	CREA 3 CREA 3 CREA 3 CREA 3
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz	19/02/2019 19/02/2019 19/02/2019 19/02/2019 19/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters	ABL ABL ABL ABL ABL ABL	CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz	16/02/2019 16/02/2019 16/02/2019 16/02/2019 16/02/2019 16/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters	Appointment Letters	ABL ABL ABL ABL ABL ABL ABL ABL	CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Zzztest1710Ed Zzztest1710Ed	18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence	ABL ABL ABL ABL ABL ABL DER	CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed	16/02/2019           16/02/2019           16/02/2019           16/02/2019           16/02/2019           16/02/2019           16/02/2019           13/02/2019           13/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence Correspondence	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence Correspondence Correspondence	ABL ABL ABL ABL ABL ABL DER DER	CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3 CREA 3
Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Test Monkey Zzz Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed Zzztest1710Ed	18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019           18/02/2019	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence Correspondence Correspondence Correspondence	Appointment Letters Appointment Letters Appointment Letters Appointment Letters Appointment Letters Correspondence Correspondence Correspondence Correspondence Correspondence	ABL ABL ABL ABL ABL ABL DER DER DER	CREA 3 CREA 3

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.

- <u>**Created</u>**. The first stage of the workflow.</u>
- <u>Created in Error</u>. 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.
- **<u>Authorised</u>**. A letter has been typed by the secretary and seen by the consultant.
- **<u>Draft</u>**. The letter has been created but is not considered completed.
- <u>**Rejected</u>**. The letter has not been approved and has been rejected by the consultant and amendments are required.</u>
- <u>Sent</u>. 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 T
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 <b>T</b>	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	
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	CREATED S
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	DRAFT REJECTED
Test Monkey Zzz	19/02/2019	Appointment Letters	Appointment Letters	ABL	SENT
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;

	Update Letter Status (?	
Se App	Are you sure you want to change the status to SENT?	Edi
Арр	Yes No	<u>1</u>
Арр		

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

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

Update Letter Status		0
Letter status has been changed succ	cessfully.	
	ок	

The updated letters will disappear from the displayed list;

40	Letters Requiring Acti	on 🔺						
	Name	Craigtest1 Zzz703Test11	Ŧ					
<u></u>	Section	Appointment Letters	Ŧ					
и и 31	SubSection	ALL	•					
	Status	CREA	•					
<u>ج</u>	Letter Template	ALL	Ŧ					
Ê	Letter Date	Please select	Ŧ		ä			
2	Set Filter	Reset						
	Set Filter Customer Name	Date	Ţ	Section	T	Sub Section	Letter Template 🔻	Status
<b></b> ₽	Customer Name	Reset Date 04/01/2019	T	Section Appointment Letters	T	Sub Section	Letter Template T x-ray-Recall Letter Copy to GP	Status CREA 📝
<b></b> ₽-	Set Filter Customer Name Crsigtest1 Zzz703Test11	Date           04/01/2019	Ţ	Section Appointment Letters	T	Sub Section	Letter Template x-ray-Recall Letter Copy to GP	Status CREA 📝
<u>_</u>	Set Filter Customer Name Craigtest1 Zzz703Test11	Date           04/01/2019	T	Section Appointment Letters	T	Sub Section T Appointment Letters	Letter Template T x-ray-Recall Letter Copy to GP	Status CREA 📝
<b></b> 	Set Filter Customer Name Craigtest1 Zzz703Test11	Date           04/01/2019	T	Section Appointment Letters	T	Sub Section	Letter Template	Status CREA 📝

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