



**Electronic Document and Records
Management System (EDRM)**

**My Patients/Favourites Module
User Guide**

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2 Revisions and Distribution

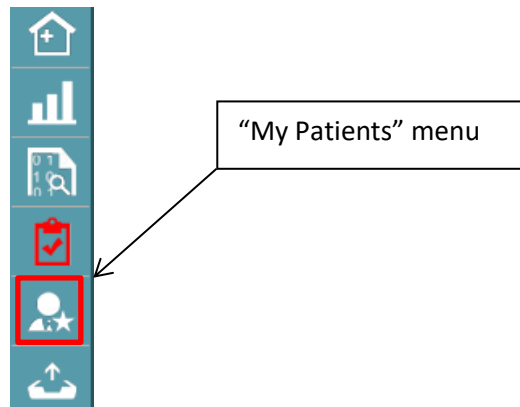
Revision	Summary of Changes	Author	Date
0.1	Initial creation for 4.2	Michael Robertson	16/01/2018
...
2.0	Content optimised for MKUH	Andrew Phelps	15/01/2019

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;



The Favourites list will appear as follows;

My Patient(s) ?

List Date:

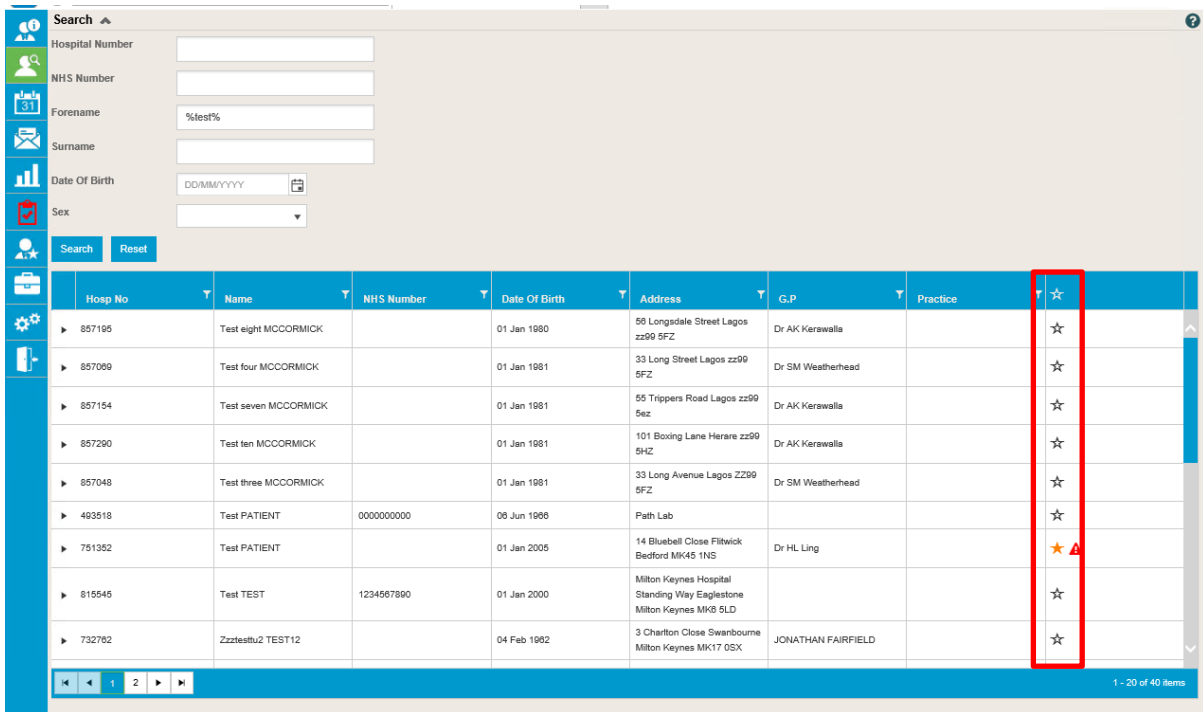
Select A List:

	Hosp No	Name	Date Of Birth	NHS Number	
▶	1315251H	Mrs Pauline CUDDY	15 May 1969	1768098320	★
▶	123456B	Mrs Pauline JAMES	24 Dec 1984	4446883640	★
▶	0264910B	Mrs Princess LEA	03 Jul 1972	4540355686	★
▶	123456A	Mrs Pauline SMITH	18 Jun 1973	4986883640	★

1 - 4 of 4 items

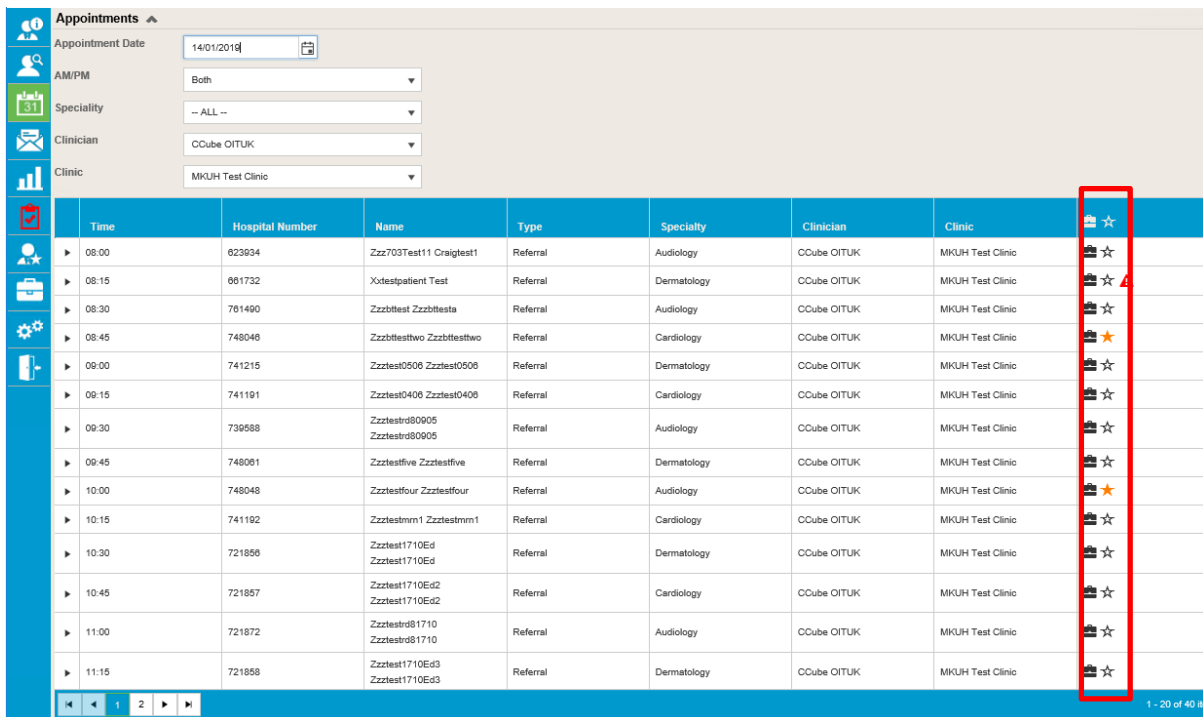
4.1 Adding and Deleting from “My Patients”

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



The screenshot shows the 'Search' interface with a search form and a table of results. The table has columns for Hosp No, Name, NHS Number, Date Of Birth, Address, G.P, and Practice. A star icon is present in the right-hand column of each row. A red box highlights these star icons.

Hosp No	Name	NHS Number	Date Of Birth	Address	G.P	Practice	Star Icon
857195	Test eight MCCORMICK		01 Jan 1980	58 Longsdale Street Lagos zz99 5FZ	Dr AK Kerwalla		☆
857099	Test four MCCORMICK		01 Jan 1981	33 Long Street Lagos zz199 5FZ	Dr SM Weatherhead		☆
857154	Test seven MCCORMICK		01 Jan 1981	55 Trippers Road Lagos zz99 5ez	Dr AK Kerwalla		☆
857290	Test ten MCCORMICK		01 Jan 1981	101 Boxing Lane Herere zz99 5HZ	Dr AK Kerwalla		☆
857048	Test three MCCORMICK		01 Jan 1981	33 Long Avenue Lagos Z299 5FZ	Dr SM Weatherhead		☆
493518	Test PATIENT	000000000	06 Jun 1966	Path Lab			☆
751352	Test PATIENT		01 Jan 2005	14 Bluebell Close Filwick Bedford MK45 1NS	Dr HL Ling		☆
815545	Test TEST	1234567890	01 Jan 2000	Milton Keynes Hospital Standing Way Eaglestone Milton Keynes MK9 5LD			☆
732762	Zzztestf2 TEST12		04 Feb 1992	3 Charlton Close Swanbourne Milton Keynes MK17 0SX	JONATHAN FAIRFIELD		☆



The screenshot shows the 'Appointments' interface with a search form and a table of results. The table has columns for Time, Hospital Number, Name, Type, Speciality, Clinician, and Clinic. A star icon is present in the right-hand column of each row. A red box highlights these star icons.

Time	Hospital Number	Name	Type	Speciality	Clinician	Clinic	Star Icon
08:00	823934	Zzz703Test11 Craigtest1	Referral	Audiology	CCube OITUK	MKUH Test Clinic	☆
08:15	861732	Xtestpatient Test	Referral	Dermatology	CCube OITUK	MKUH Test Clinic	☆
08:30	781490	Zzzbttest Zzzbttesta	Referral	Audiology	CCube OITUK	MKUH Test Clinic	☆
08:45	748048	Zzzbttesttwo Zzzbttesttwo	Referral	Cardiology	CCube OITUK	MKUH Test Clinic	☆
09:00	741215	Zzztest0508 Zzztest0508	Referral	Dermatology	CCube OITUK	MKUH Test Clinic	☆
09:15	741191	Zzztest0408 Zzztest0408	Referral	Cardiology	CCube OITUK	MKUH Test Clinic	☆
09:30	739588	Zzztestr90905 Zzztestr90905	Referral	Audiology	CCube OITUK	MKUH Test Clinic	☆
09:45	748061	Zzztestfive Zzztestfive	Referral	Dermatology	CCube OITUK	MKUH Test Clinic	☆
10:00	748048	Zzztestfour Zzztestfour	Referral	Audiology	CCube OITUK	MKUH Test Clinic	☆
10:15	741192	Zzztestmm1 Zzztestmm1	Referral	Cardiology	CCube OITUK	MKUH Test Clinic	☆
10:30	721856	Zzztest1710E4 Zzztest1710E4	Referral	Dermatology	CCube OITUK	MKUH Test Clinic	☆
10:45	721857	Zzztest1710E2 Zzztest1710E2	Referral	Cardiology	CCube OITUK	MKUH Test Clinic	☆
11:00	721872	Zzztestr981710 Zzztestr981710	Referral	Audiology	CCube OITUK	MKUH Test Clinic	☆
11:15	721858	Zzztest1710E3 Zzztest1710E3	Referral	Dermatology	CCube OITUK	MKUH Test Clinic	☆

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	1768068320	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			★
▶ 119067X	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	4407869026	21 Nov 1964	1 Toto Wad Wad Townsfieldon Exexx 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	4968883640	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.

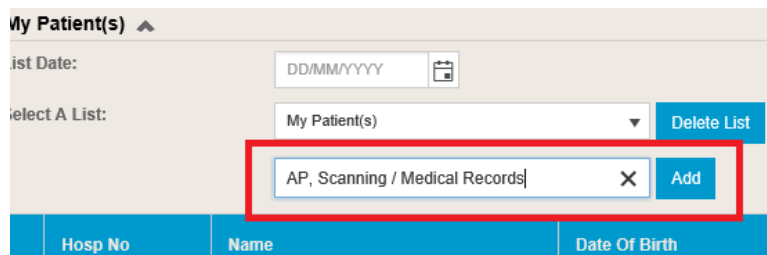
To create a Favourites list the user types in a name of the list they want to create and clicks the Add button.

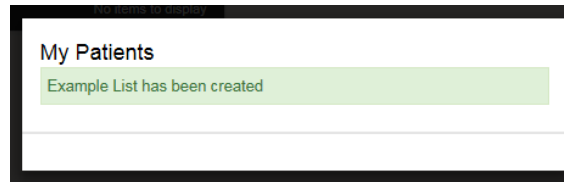
Important

The name of a Patient List will have the following format;

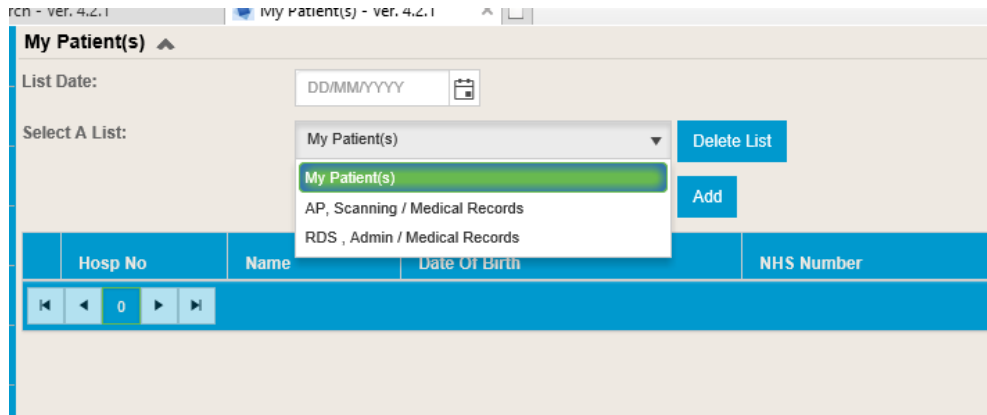
Your initials , area / department

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.

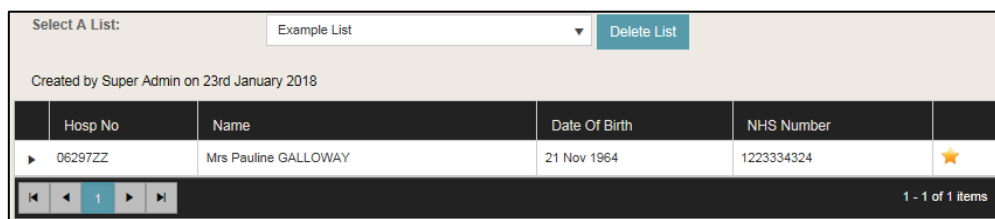




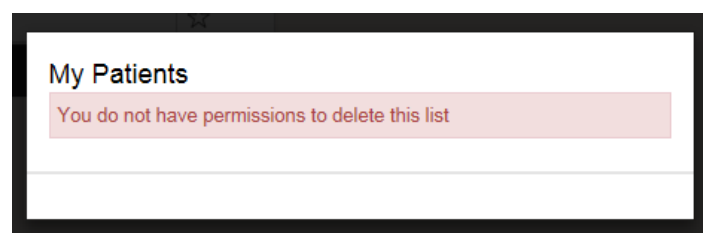
Below is an example of the new Favourites list after being created;



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.

Hosp No	Name	Date Of Birth	NHS Number	
111111A	Mrs Pauline GLORTER	10 Feb 1968	7879209280	☆
Copy To		-- Please Select --	Remove	
				1 - 1 of 1 items

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.

My Patients

Are you sure you want to copy this patient to the list Example List

Yes

If “Yes” is clicked then a further confirmation message is displayed.

My Patients

This patient has been copied to the list Example List