



Better informed means better care

Dorset Care Record brings all your health details together so medical and social care staff **can give you the best possible care**

Dorset Care Record How to create Collaborative Worklists



For more information please visit:
news.dorsetcouncil.gov.uk/dcr-staff-area

Objectives

This user guide will help you to:



Understand what **Collaborative Worklists** are and **when** to use them



Create a new collaborative worklist, and mark them as **favourite**



Add and remove people from a collaborative worklist



Customise and update your collaborative worklist, including **adding quick comments**



Sort and filter a collaborative worklist



Download and print a collaborative worklist



Access **support and further information**



Collaborative Worklists Overview

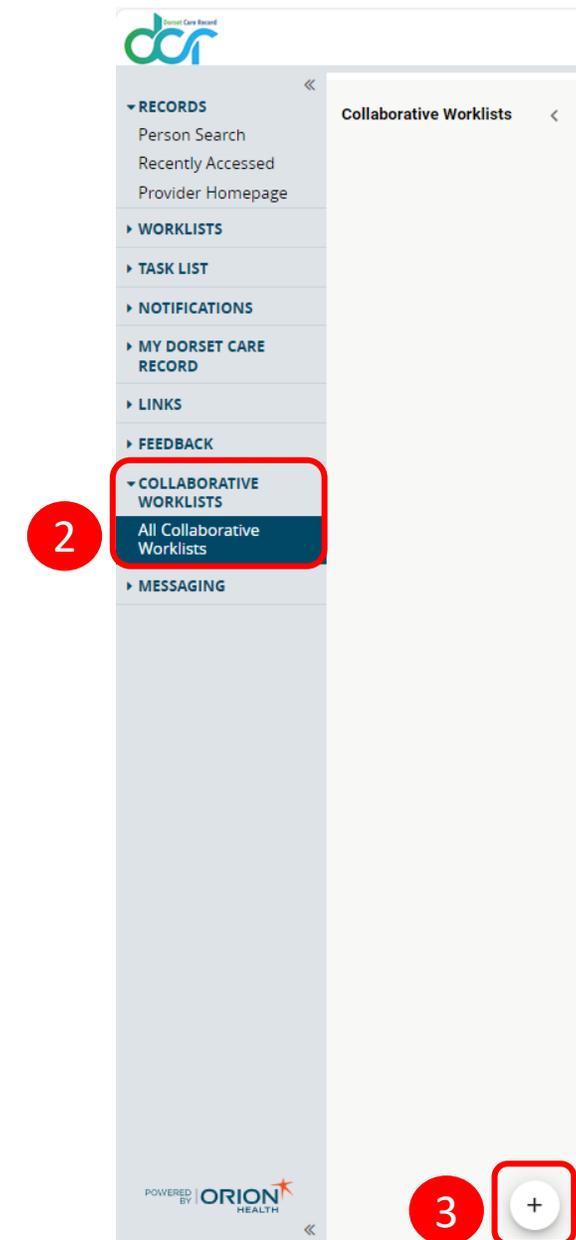
Collaborative Worklists within DCR provide the technology for care teams to collaborate and proactively manage care, within their direct teams or across multi-disciplinary teams.

Users can set up a clinic that provides information about the people beforehand or they can set up a caseload for monitoring the most at-risk people.

This can help to rapidly close gaps in care to achieve better collaboration across teams and partners and improved care provision and outcomes.

Create a New Worklist

- 1 Access the DCR from the internet browser at <https://prof.dorsetcarerecord.nhs.uk/concerto/Login.htm>.
- 2 From the side menu in the DCR, click on **Collaborative Worklists** and then on **All Collaborative Worklists**.
- 3 Click on the **plus symbol button** at the bottom of the screen. **Create New List** appears, as can be seen in the next slide.



Create a New Worklist

- 4 Create a new **List Name** and add a **Description** of what this list is for e.g. Radiology Clinic list

Create New List

List Name* 4

Description

Columns

List Specific Columns

- Date
- Date1
- Date2
- Date3
- Date4
- Date5
- Date6
- Date7
- Date8
- Date9
- List Comments
- List Comments1
- List Comments2
- List Comments3
- List Comments4
- List Comments5
- List Comments6
- List Comments7

Drag and drop columns into order here

- Patient ID*
- Name*

Create a New Worklist: Adding Columns

5 You can add columns from the following categories to a collaborative worklist – **List Specific Columns**, **Patient Demographics**, **Patient Identifier**, **Pathway Enrolment**, **Tasks**, **Patient Encounters**, **Relationships**. All the columns, except for the **List Specific Columns**, pull data from the **DCR**. You can customise **the List Specific Columns**.

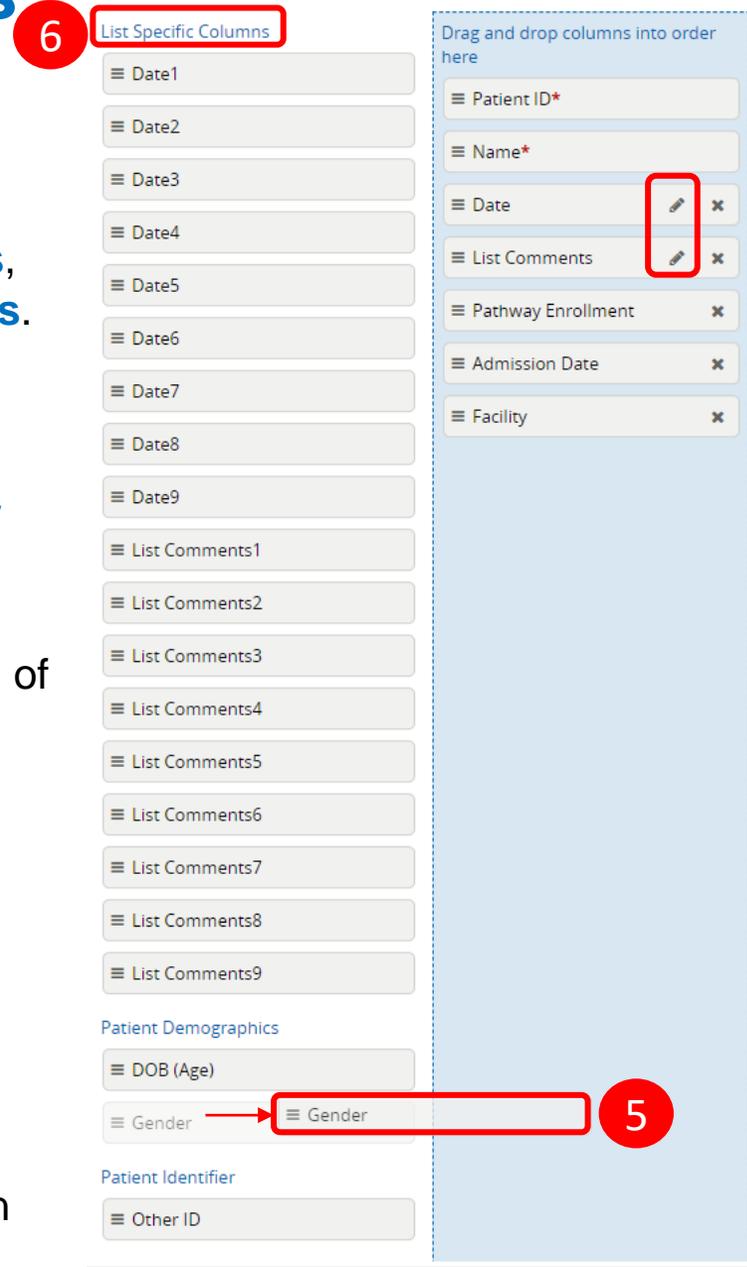
Click on relevant **Columns** from the left side and drag-and-drop the required columns from the left to the right side. You can also move a column by highlighting it with the **Tab** key, and then pressing the **Enter** key, on your keyboard.

6 Under the heading **List Specific Columns** there are two special types of columns – **Date** and **List Comments** which can be customised once they've been added in the column to the right.

7 Click on the **pencil symbol** to customise the titles of these columns.

For the **Date** column, you can make this date represent something meaningful to you e.g. date of a clinic, or last contact or last review.

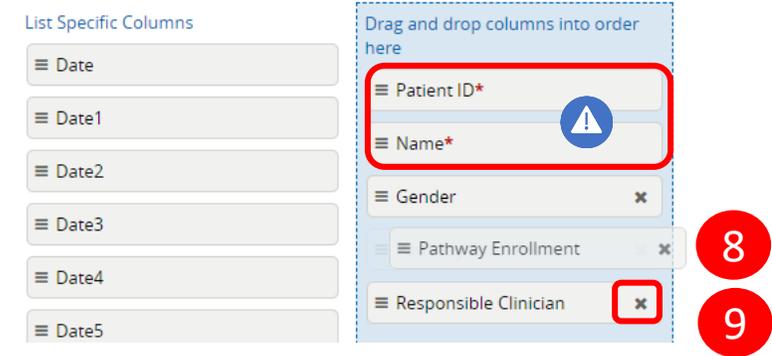
The **List Comments** column allows you to add your own comments relating to this person. The **Date** column could also be used to directly relate to the comments, such as the date a conversation or observation was made.



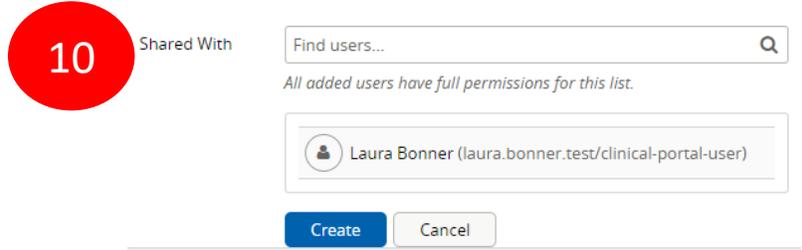
The screenshot displays the 'List Specific Columns' interface. On the left, a list of columns is shown under the heading 'List Specific Columns'. A red box highlights the 'List Specific Columns' heading. Below it, there are two categories: 'Date' (with columns Date1 through Date9) and 'List Comments' (with columns List Comments1 through List Comments9). Below these are 'Patient Demographics' (with columns DOB (Age) and Gender) and 'Patient Identifier' (with column Other ID). A red box highlights the 'Gender' column in the 'Patient Demographics' section, with a red arrow pointing to it from the right. On the right side, a dashed box contains the 'Drag and drop columns into order here' area. It shows a list of columns: Patient ID*, Name*, Date, List Comments, Pathway Enrollment, Admission Date, and Facility. Red boxes highlight the pencil icons next to the 'Date' and 'List Comments' columns in this area. A red circle with the number '7' is positioned to the right of this area. At the bottom right, a red circle with the number '5' is positioned next to the 'Gender' column in the 'Patient Demographics' section.

Create a New Worklist: Adding Columns

- 8 To change the column order in the list to the right, drag-and-drop the column badges to the required position.
- 9 To remove a column from the list to the right, click its remove icon **X** or drag-and-drop it into the left list.
- ⚠ The **Patient ID** and **Name** columns marked with red asterisk on the right side are mandatory and cannot be deleted from the list.



- 10 Find **Users** that you wish to share this list with or *please note* that you can have a **Personal** list for your use only.

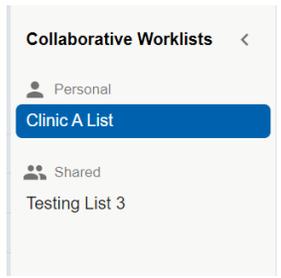


Note

- ⚠ Be mindful that the list can only be shared with staff with DCR access.

All shared lists give members **rights** to **edit**, **delete**, **add comments**, **add** or **remove users**.

The staff you are sharing this collaborative worklist with will **not** receive a notification that the list has been shared with them. Therefore, an email advising the person that you have shared a worklist would be advisable. The staff member will then need to go to the collaborative worklist menu in the DCR to see it.



11

Once the collaborative worklist is completed, click on **Create**.

Shared With

All added users have full permissions for this list.

 Laura Bonner (laura.bonner.test/clinical-portal-user)

Create Cancel

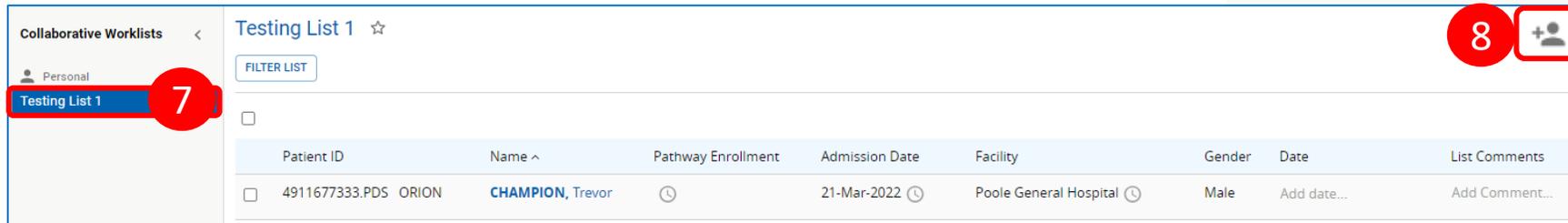
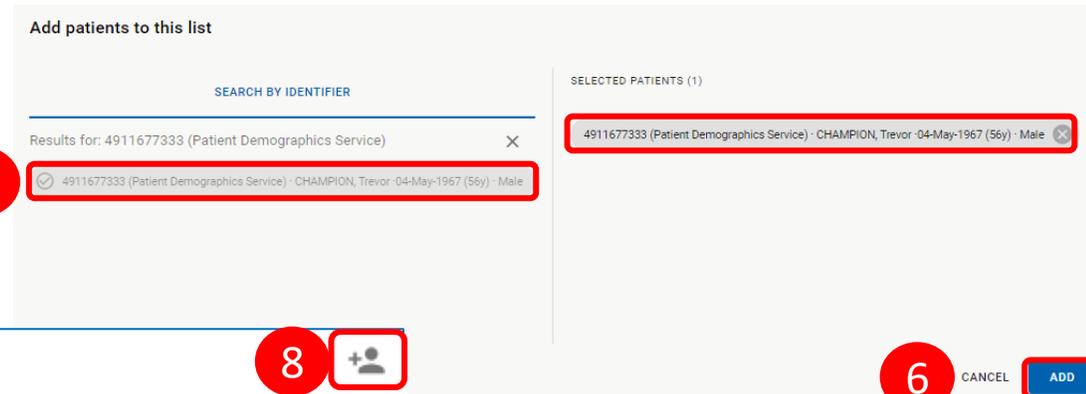
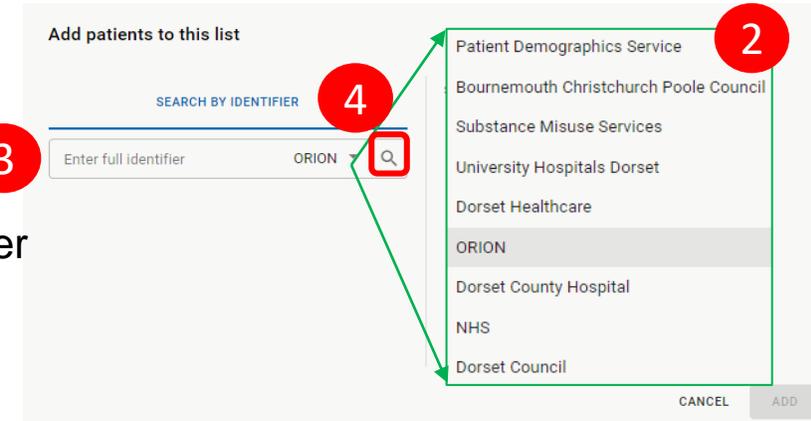
Your new worklist opens, and you can now start adding patients to the list.



The screenshot shows the Dorset Care Record interface. On the left is a navigation menu with categories: RECORDS (Person Search, Recently Accessed, Provider Homepage), WORKLISTS, TASK LIST, NOTIFICATIONS, MY DORSET CARE RECORD, LINKS, FEEDBACK, and COLLABORATIVE WORKLISTS (All Collaborative Worklists). The main content area is titled 'Collaborative Worklists' and shows a sub-section for 'Personal' with a list containing 'Testing List 1'. The 'Testing List 1' entry is highlighted. To the right of the list is a 'FILTER LIST' button. Below the list, a message states 'There are no patients to display' with a 'START ADDING PATIENTS' button. The top right of the main area contains icons for user, download, refresh, settings, and print.

Add a Person to a Collaborative Worklist: Option 1

- 1 Click on the **Start Adding Patients** button that appears after you've created the new collaborative worklist, as can be seen in the previous slide.
- 2 Select a **Partner** from the Partner drop-down menu.
- 3 Enter the person's **full identifier**. Please ensure this corresponds with the Partner selected, otherwise it will return **No Results Found**.
- 4 Click on the **Search symbol**. The search Results will be shown underneath.
- 5 Click on the relevant result and this will populate the **Selected Patients** list on the right.
- 6 Click on **Add**. The patient has been added to the list.
- 7 For the patient to *show* in the list, refresh the list by clicking on the list.



- 8 To keep adding patients to the list, you now need to click on the **add people symbol** in the top right part of the screen and repeat the steps above.

Add a Person to a Collaborative Worklist: Option 2



- 1 Another way to add a person to a collaborative worklist is to search in the DCR for the person that you wish to add, and from the Person Summary of their record, select **Collaborative Worklists**.
- 2 Select **Add Patient to list**.
- 4 From the collaborative worklists that are available to add this person to e.g. Testing List 1, click on the collaborative worklist you would like to add them to.



CHAMPION, Trevor (Mr)
BORN 04-May-1967 (56y) GENDER Male
ADDRESS (3) Dorset County Hospital, WILLIA... HOME -

Summary Problem List Patient Task List

Documents Showing All Mark All As Read Group By Category Sort By Date

Summary
Additional Details
my Dorset Care Record Invitation
Circle of Care
Collaborative Worklists
Goals and Actions
Send Citizen Feedback

+ Add Patient to List
This patient is not on any lists.

Once the patient has been added to a collaborative worklist, this will show in their record:

[+ Add Patient to List](#)

The patient is currently on 1 list

The patient will also show on the **Collaborative Worklist**.

Collaborative Worklists < Testing List 1 ☆

PERSONAL
Testing List 1

FILTER LIST

Patient ID	Name ^	Gender	Pathway Enrollment	Responsible Clinician
<input type="checkbox"/>				
<input type="checkbox"/>	4911677333.PDS ORION	CHAMPION, Trevor	Male	🕒 1

Adding Patients with Similar Names to a Collaborative Worklist



Please note the following when you add 2 or more patients with similar names e.g. please see example below where two patients have the same surname:

- 1 It will highlight the names in red and
- 2 It will notify you above the Filter List button.

The screenshot shows the 'Collaborative Worklists' interface for 'Clinic A List'. A notification box above the 'FILTER LIST' button states: 'This list contains patients with similar names.' The table below lists patients with columns for Patient ID, Name, DOB (Age), Gender, and Date. Two rows are highlighted in red: 'SOCIALCARE, Oct' and 'SOCIALCARE, TwelveTest'. A red circle with the number '1' points to these highlighted rows, and another red circle with the number '2' points to the notification box.

Patient ID	Name ^	DOB (Age)	Gender	Date
<input type="checkbox"/> 9999999646.PDS ORION	BOSTON , Buddy	01-Jan-2000 (23y)	Male	Add date...
<input type="checkbox"/> 1417194200.NHS ORION	• SOCIALCARE , Oct	29-Dec-2000 (22y)	Female	Add date...
<input type="checkbox"/> 4462644271.NHS ORION	• SOCIALCARE , TwelveTest	12-Jan-1990 (33y)	Female	Add date...
<input type="checkbox"/> T4160583.RDZ.CAMIS ORION	TURTLE , AMY	01-May-1997 (26y)	Female	02-May-2022

Removing a Person From a Collaborative Worklist: Option 1



1 Open the person's **DCR** record, and from the list in the left menu on the **Summary tab** choose **Collaborative Worklists**.

This will show you all the collaborative lists that this person is on e.g. Testing List 1 & Testing List 3.

The screenshot displays the Dorset Care Record interface for a patient named Trevor Champion. The patient's details, including NHS and PDS numbers, are visible at the top. The left-hand navigation menu is open, and the 'Collaborative Worklists' option is highlighted with a red box and a red circle containing the number '1'. The main content area shows a list of collaborative worklists: 'Testing List 1' and 'Testing List 3'. The 'Testing List 1' entry has a red box around its 'X' icon, with a red circle containing the number '2' next to it. A status message at the top right of the list area reads 'The patient is currently on 2 lists'.

2 Click on the **X** of the **Collaborative List** from which you would like to remove the patient from.

The person will then be removed from that collaborative worklist.

Removing a Person From a Collaborative Worklist: Option 2



1 From the Collaborative Worklist, select the patient you would like to remove.

The screenshot shows the Dorset Care Record interface. On the left is a navigation menu with sections: RECORDS (Person Search, Recently Accessed, Provider Homepage), WORKLISTS (Testing List 3 selected), TASK LIST, NOTIFICATIONS, MY DORSET CARE RECORD, and LINKS. The main area displays 'Collaborative Worklists' with 'Testing List 3' selected. Below this, it says 'Shared with 2 users' and 'FILTER LIST'. A table lists patients with columns: Patient ID, Name, List Comments, Gender, DOB (Age), and Other ID. The first row, '9999999646.PDS ORION BOSTON, Buddy', is selected (checkbox checked) and highlighted with a red box labeled '1'. A bin icon is next to the selection, labeled '2'. Below the table, a pop-up box titled 'Remove Patient(s) from list' is shown, containing the text 'These patients will be removed from this list' and 'SELECTED PATIENTS'. A patient entry 'BOSTON, BUDDY 9999999646.PDS • MALE 23Y' is listed with a bin icon labeled '3'. At the bottom of the pop-up are 'CANCEL' and 'Remove' buttons, with 'Remove' labeled '4'.

Patient ID	Name ^	List Comments ⁹	Gender	DOB (Age)	Other ID
<input checked="" type="checkbox"/> 9999999646.PDS ORION	BOSTON , Buddy	Add Comment...	Male	01-Jan-2000 (23y)	9999999646 NHS
<input type="checkbox"/> 4911677333.PDS ORION	CHAMPION , Trevor	Add Comment...	Male	04-May-1967 (56y)	4911677333 NHS

2 Click on the **Bin symbol**, which gives you the option to **Remove Selected Patients**.

3 A pop-up box gives you the option to check that this/these are the patients you would like to remove. If you've included patients that you no longer want to remove, click on the **X** for them to remain on the **Collaborative Worklist**.

4 Click on **Remove** and the patients will be removed from that **Collaborative Worklist**.

Remove Patient(s) from list
These patients will be removed from this list
SELECTED PATIENTS

BOSTON, BUDDY 9999999646.PDS • MALE 23Y

CANCEL

Remove

Marking Collaborative Worklists as Favourite

1 You can also mark a personal or shared list as a **favourite list**.

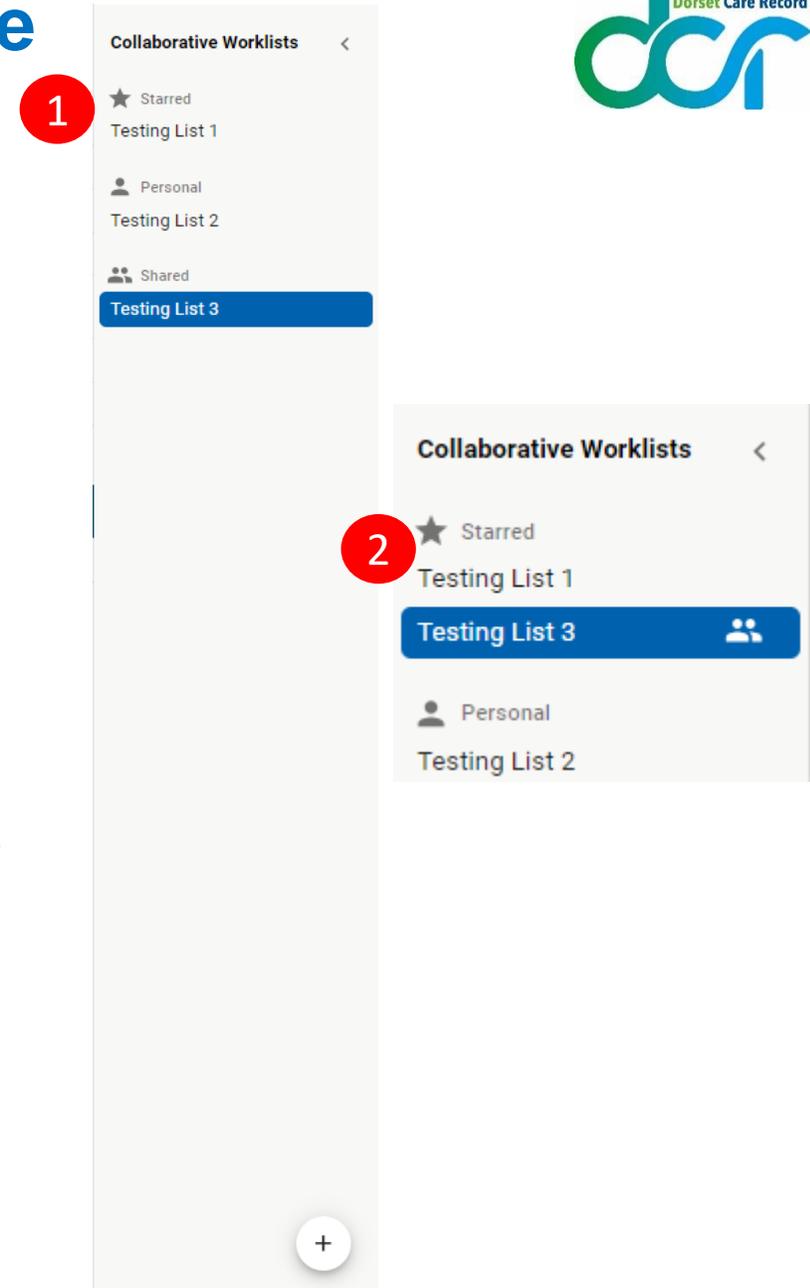
Favourite lists are for lists that you use a lot and will appear at the top of the worklist panel.

To mark it as favourite, click on the star symbol next to the name of the list. Testing List 1 

2 If a list is both a **favourite** and **shared**, it will show under the **Starred** category and carry the shared symbol. 

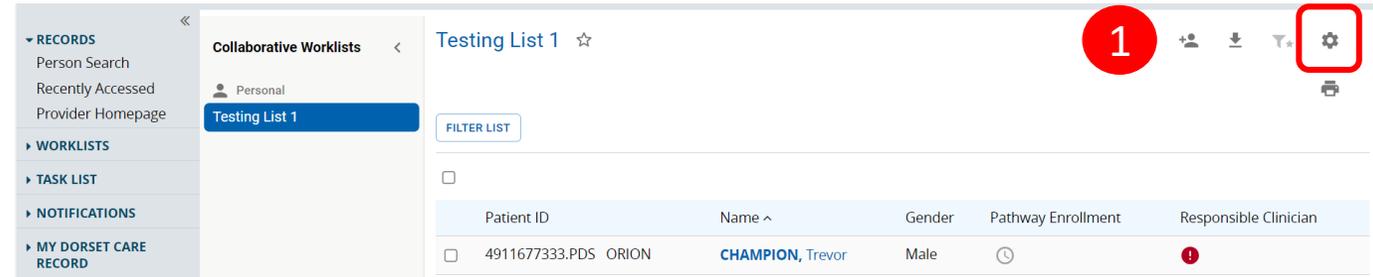
Note

Please note that either the Starred, Personal or Shared Collaborative Worklists will show the lists arranged alphabetically.



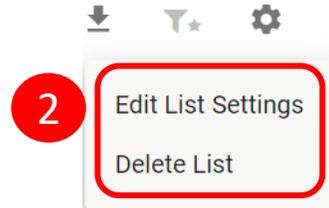
Updating a Collaborative Worklist

1 To update a collaborative worklist, click on the cog in the right corner of the screen.



2 Select **Edit List Settings** if you would like to edit the list or **Delete List** if you would like to delete it.

3 In the **Edit List Settings** screen, you can add extra columns or remove columns that are not needed.



4 Click **Update** to update your list.

5 In the **Delete List** screen, you will be asked to **confirm** your action.

If this is a shared collaborative worklist, please advise the other users of this shared list that you intend to delete it, in case they may still need to see this list.

Confirm Delete

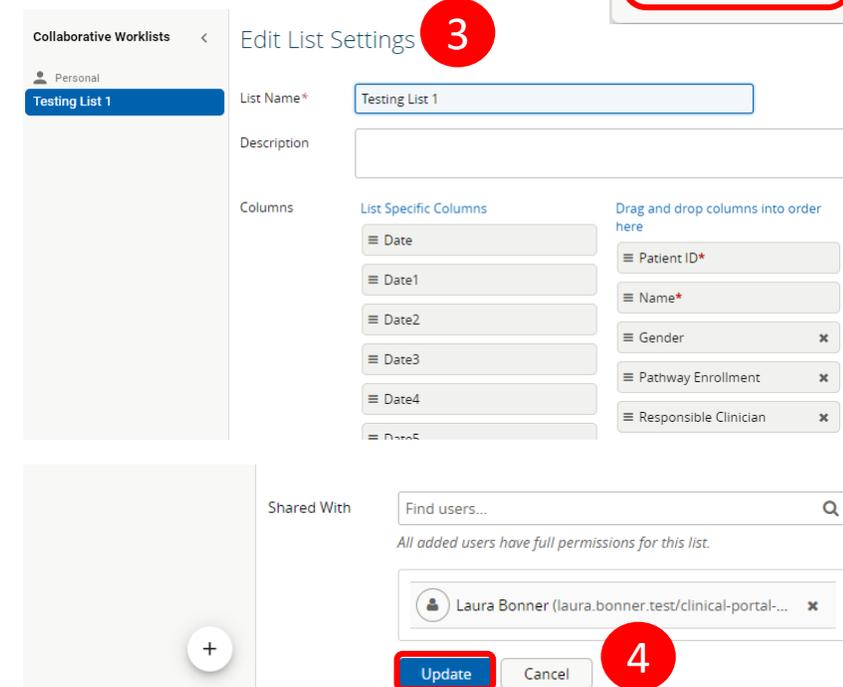
This list contains patients. Are you sure you want to delete it?

CANCEL

CONFIRM

5

Once confirmed, the collaborative worklist will be removed from DCR.



Customise your Worklist by Adding Customised Dates and List Comments

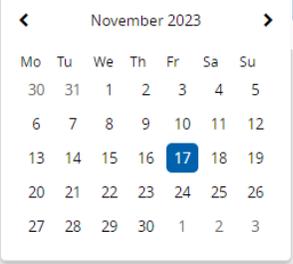
Once a patient has been added to a collaborative worklist and if the Date and List Columns have either been selected for that collaborative worklist when it was first set up or added in at a later date, you can add customised dates and comments in the Date and List Comments boxes to aid with their monitoring.

Testing List 1 ☆

Patient ID	Name ^	Pathway Enrollment	Admission Date	Facility	Gender	Date	List Comments
<input type="checkbox"/> 4911677333.PDS ORION	CHAMPION, Trevor		21-Mar-2022	Poole General Hospital	Male	<input type="text"/>	<input type="text"/>

1

2



Mo	Tu	We	Th	Fr	Sa	Su
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

1

Create a date in this field that is relevant to your list. For example, clinic date could be entered here.

2

You can add your own comments in this box, up to a maximum of 800 characters.

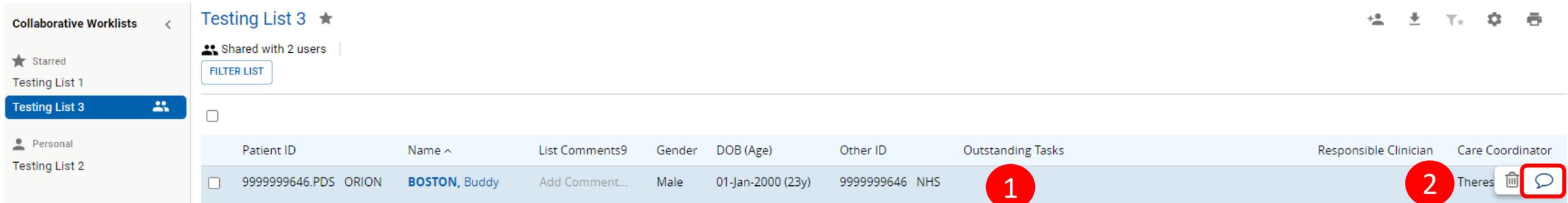


Important

Comments made in this box are not recorded anywhere else in DCR. Therefore, if the collaborative list is deleted at a later date these notes are also deleted.

Adding Quick Comments

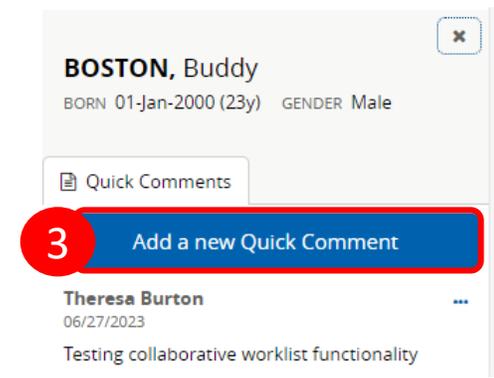
Quick comments can be used to let the staff you are sharing collaborative worklists with know that one person appears on other worklists too. Otherwise, this can only be known from the person's DCR record under Collaborative Worklists.



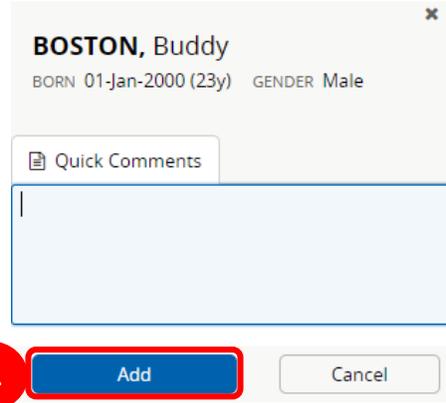
Patient ID	Name ^	List Comments9	Gender	DOB (Age)	Other ID	Outstanding Tasks	Responsible Clinician	Care Coordinator
9999999646.PDS ORION	BOSTON , Buddy	Add Comment...	Male	01-Jan-2000 (23y)	9999999646 NHS		Theres	Theres 

- 1 Click on the **patient line** to add a quick comment.
- 2 Click on the **quick comments symbol** that appears.
- 3 Click on **Add a new Quick Comment** in the fold-over screen that shows.

Previous quick comments can be seen listed underneath the **Add a new Quick Comment** button.



Adding Quick Comments



4 Type in your comment and click on **Add**.

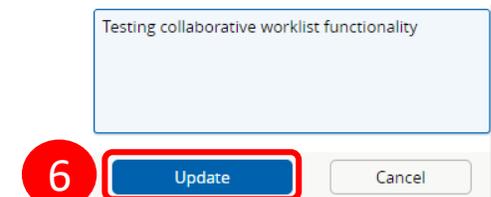
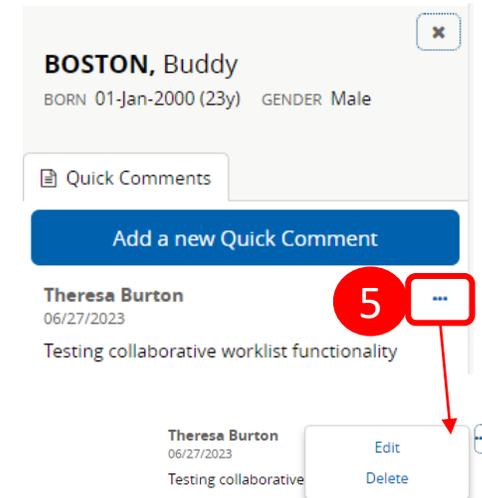
5 Once added, the quick comment can be seen underneath the Add a new Quick Comment button. give you the option to **Edit** or **Delete** the comment.

6 You can edit all quick comments, irrespective of who has added these. When you've finished editing a quick comment, click on **Update**.

Note

Please note that these quick comments are not saved anywhere in DCR so if deleted there is no record of them.

If you've accidentally deleted a quick comment, the option to Undo is available to you for 3 seconds, with a countdown giving you the option to click on Undo.



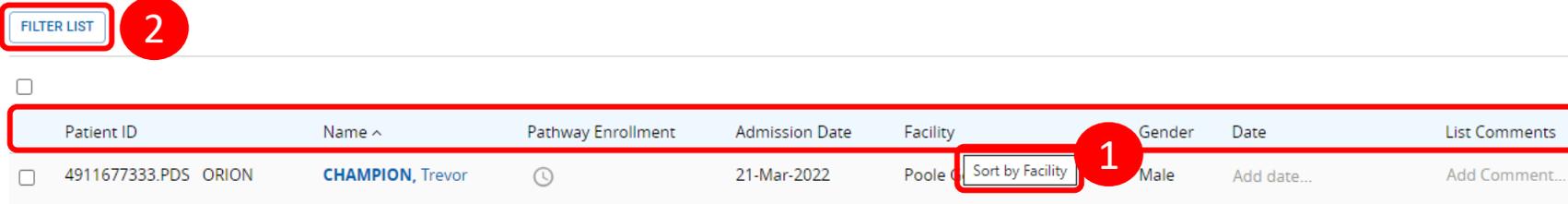
Sorting / Filtering a Collaborative Worklist

The **default sorting** for a **Collaborative Worklist** is alphabetically by surname. Where there are several surnames that are the same, the sorting will be then made by forename.

1 You can **sort** a collaborative worklist by the categories listed in the header - click on any of them to sort the list accordingly.

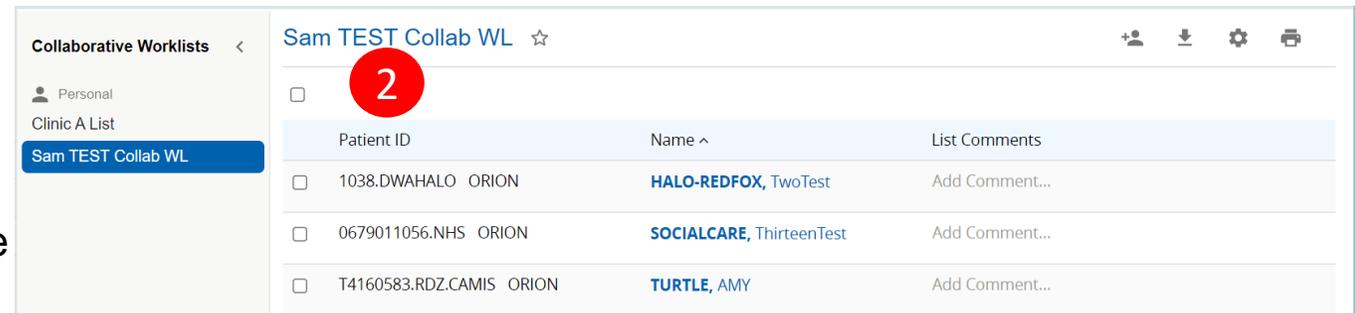
For example, hovering above the Facility column shows that if I click on Facility, it will sort my list by Facility.

Testing List 1 ☆



Patient ID	Name ^	Pathway Enrollment	Admission Date	Facility	Gender	Date	List Comments
<input type="checkbox"/> 4911677333.PDS ORION	CHAMPION, Trevor		21-Mar-2022	Poole	Male	Add date...	Add Comment...

2 *Please note* that the **Filter List button** will only show if there are dates within the data within the columns you've selected for the **Collaborative Worklist**. Please see screenshot on the right without the **Filter List button** and screenshot above with the **Filter List button**.



Patient ID	Name ^	List Comments
<input type="checkbox"/> 1038.DWAHALO ORION	HALO-REDFOX, TwoTest	Add Comment...
<input type="checkbox"/> 0679011056.NHS ORION	SOCIALCARE, ThirteenTest	Add Comment...
<input type="checkbox"/> T4160583.RDZ.CAMIS ORION	TURTLE, AMY	Add Comment...

If the **Filter List button** shows, click on it to filter your collaborative worklist by the data in the columns you've selected.

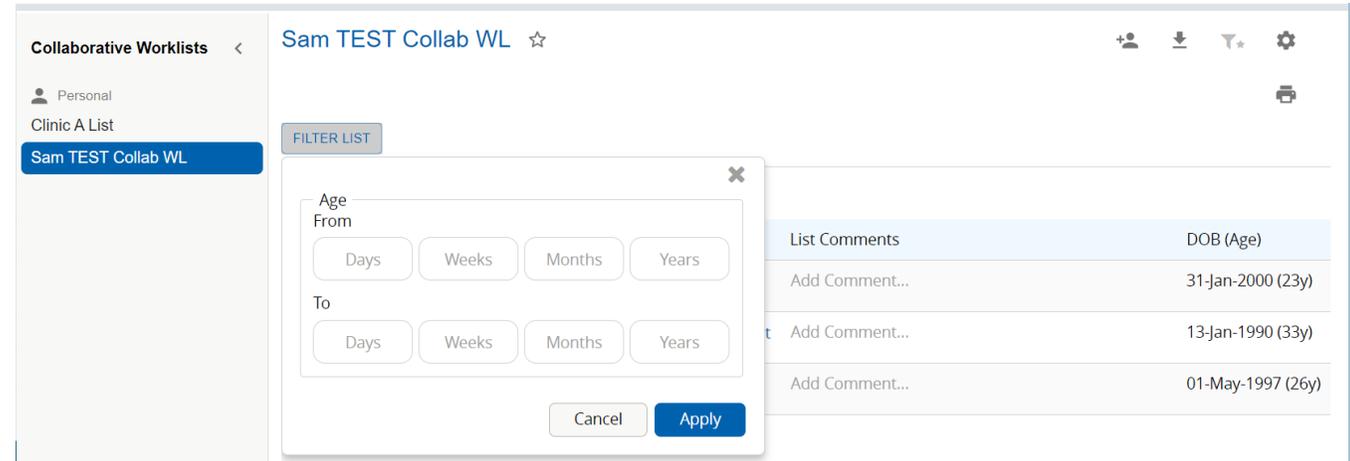
Sorting / Filtering a Collaborative Worklist

2 Continued.

A pop-up box will ask you to input the dates for filtering.

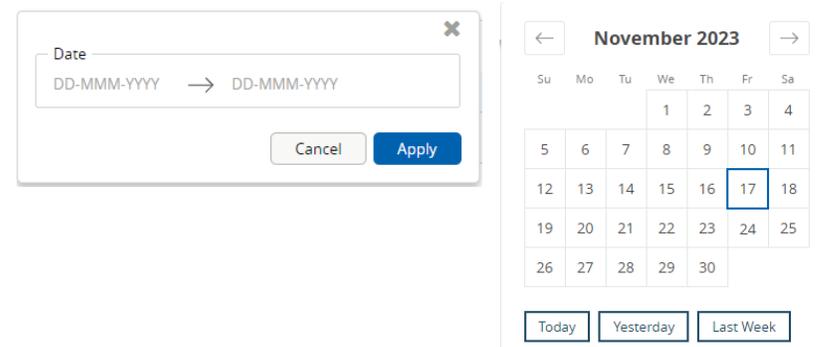
Please see the two example screenshots to the right.

Select the dates from the pop-up calendars and then click on Apply.



The screenshot shows the 'Sam TEST Collab WL' interface. A 'FILTER LIST' dialog box is open, allowing selection of a filter type (Age) and date ranges (From and To) using 'Days', 'Weeks', 'Months', or 'Years'. The background shows a table with columns for 'List Comments' and 'DOB (Age)'. The table contains three rows of data:

List Comments	DOB (Age)
Add Comment...	31-Jan-2000 (23y)
Add Comment...	13-Jan-1990 (33y)
Add Comment...	01-May-1997 (26y)



The first screenshot shows a 'Date' input field with the format 'DD-MMM-YYYY' and an 'Apply' button. The second screenshot shows a calendar for November 2023 with the 17th highlighted. The calendar includes navigation arrows, a header for 'November 2023', and buttons for 'Today', 'Yesterday', and 'Last Week'.

Downloading and Printing a Collaborative Worklist

This may be particularly useful when preparing for a clinic for example. Whilst you can also email a worklist, please be mindful of the UK GDPR and data protection your organisation's secure email policy, as the list contains confidential information.



1 To download a worklist, click on the **Download button** to the right of the **Collaborative Worklists** screen. This will inform you that you are about to download the worklist as a CSV file.

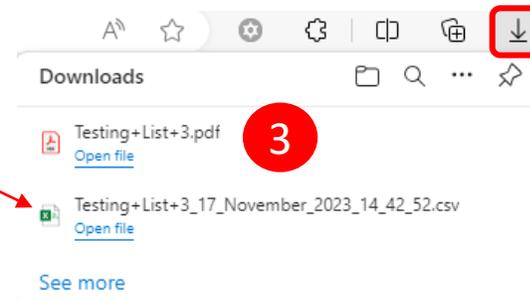
2 Click on **Download**, and a message will pop up at the top of your page to show you that it's been downloaded.

Download CSV file

You are about to download this worklist as a CSV file.

CANCEL **DOWNLOAD**

2



3 To print a worklist, click on the **Print button**, and when ready a pdf version of the downloaded worklist will be available to you for printing.



Access further **support and information** from
<https://news.dorsetcouncil.gov.uk/dcr-staff-area/learning-resources/>



Disclaimer

The screenshots in this training guide are taken from a test system and as such may vary slightly to the live DCR system.

Screenshots in this training guide do not contain any real patient data.

Data provided by source systems is read-only in DCR. There are various level of restrictions and sensitivities being applied within the Partner's systems, and the DCR respects and displays the data as provided by the Partners.

The information contained within the NHS Dorset system (the Spine) is the overriding system for updating demographics.