



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 worklists to view a number of records



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

Worklists

A worklist is an optional tool that can be used to easily find people you may be interested in regularly viewing or monitoring, saving time searching or needing reference numbers to hand.

Examples of using worklists include monitoring people under a specific consultant, clinic, or a practitioner's caseload.

Note

There are 6 worklists available so you could monitor 6 separate groups of people if you wish. Worklists are initially represented by colour names but you can rename these to make them more meaningful to you.

RECORDS

Person Search

Recently Accessed

Provider Homepage

WORKLISTS

Red

Orange

Yellow

Green

Blue

Purple

LINKS

Red [Rename](#)

<input type="checkbox"/>	NHS Number	Other Identifier	Other Identifier	Name	Gender	Born (Age)	
<input type="checkbox"/>	-	1251666 (DHUFT RiO)	1251666 (DHUFT RiO)	ROBERTS, Hugh	Male	19-Feb-1988 (29 years)	
<input type="checkbox"/>	416 006 6348	HE00017044 (RBCHFT CaMIS)	HE00017044 (RBCHFT CaMIS)	RICHARD, GARNER	Male	21-Dec-1933 (84 years)	
<input type="checkbox"/>	485 337 9371	HE00017043 (RBCHFT CaMIS)	HE00017043 (RBCHFT CaMIS)	JORDAN, SARAH	Female	21-Aug-1922 (95 years)	
<input type="checkbox"/>	-	HE00011888 (RBCHFT CaMIS)	HE00011888 (RBCHFT CaMIS)	WHITE, SNOW	Female	26-May-1995 (22 years)	
<input type="checkbox"/>	570 020 0716	HE00017041 (RBCHFT CaMIS)	HE00017041 (RBCHFT CaMIS)	DODD, PATRICIA	Female	23-Apr-1957 (60 years)	
<input type="checkbox"/>	822 567 6149	HE00017042 (RBCHFT CaMIS)	HE00017042 (RBCHFT CaMIS)	ALICE, ROBERTS	Female	03-Mar-1965 (52 years)	
<input type="checkbox"/>	-	D802122 (DCHFT PCS)	D802122 (DCHFT PCS)	COPATH, Blake	Male	12-Dec-1966 (51 years)	

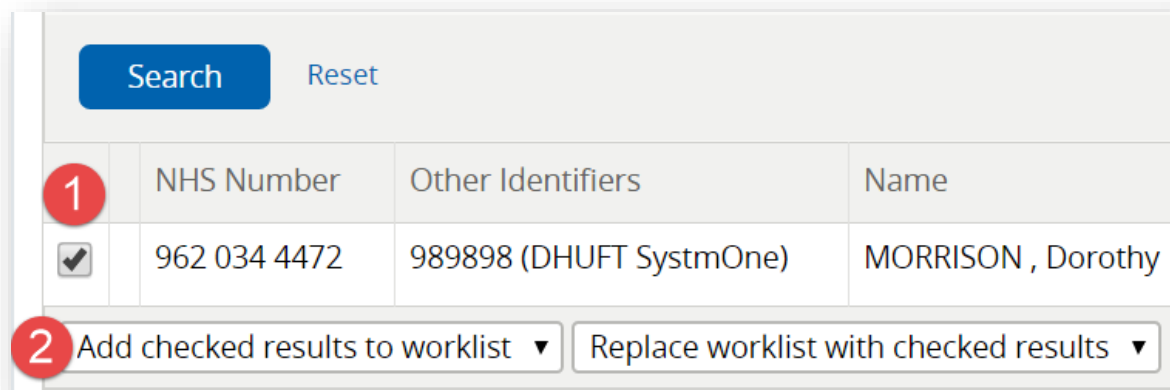
[Remove](#) None selected

Adding to a Worklist

To add a person to a worklist, first search for the person in DCR, then:

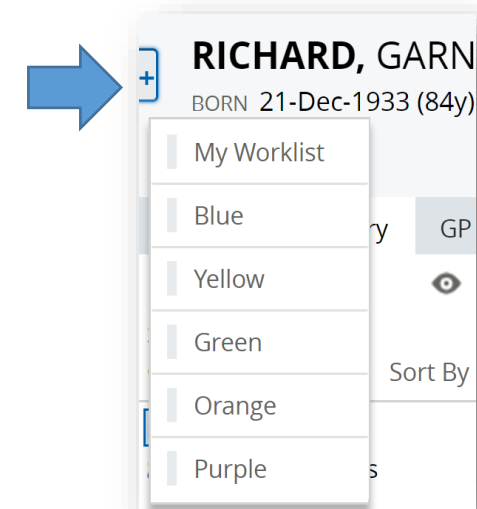
1. In the person search results, tick the check box on the left (as shown below)
2. Click on the “Add checked results to worklist” dropdown box, which will show all the worklists available
3. Select the name of the worklist you wish to add this person to.

Alternatively, with a person’s record open, you can add them to a worklist by clicking on the plus sign next to their name, then from the dropdown list, click on the name of the worklist you wish to add them to.



	NHS Number	Other Identifiers	Name
1 <input type="checkbox"/>	962 034 4472	989898 (DHUFT SystemOne)	MORRISON , Dorothy

2 Add checked results to worklist ▼ Replace worklist with checked results ▼

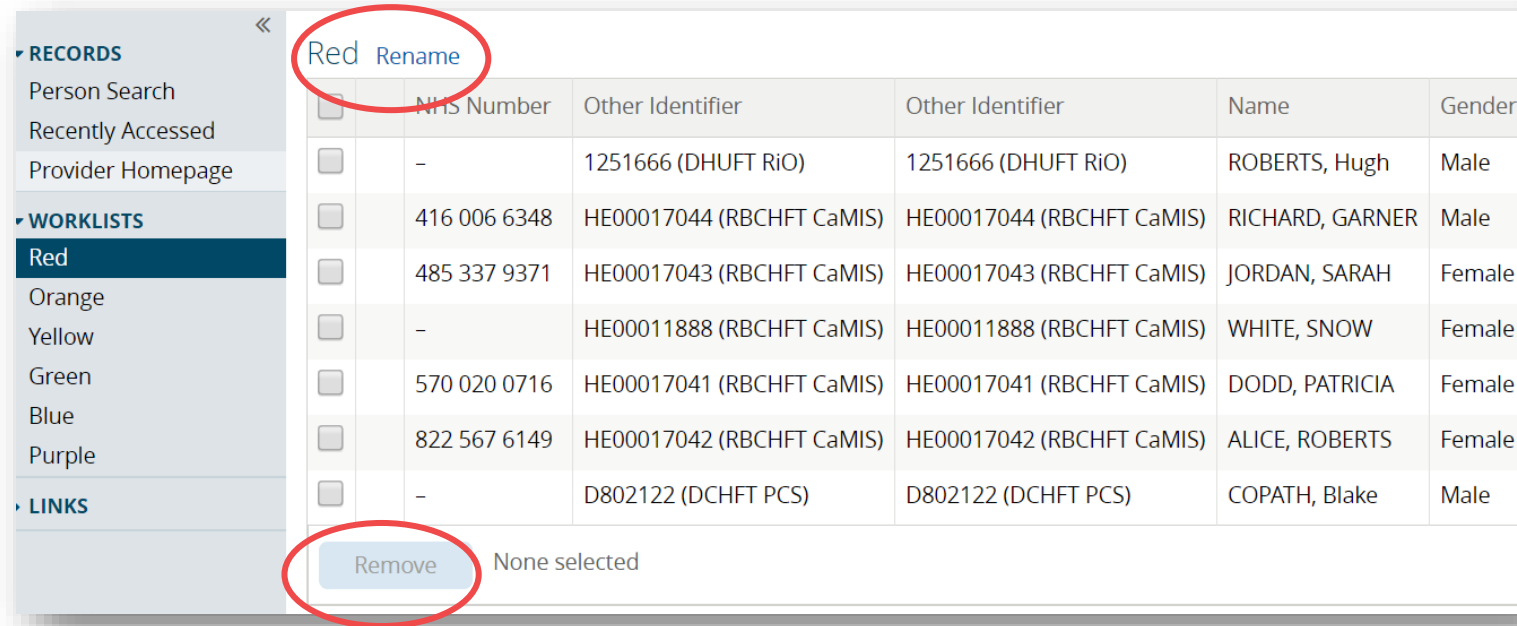


RICHARD, GARN
BORN 21-Dec-1933 (84y)

+ My Worklist
Blue
Yellow
Green
Orange
Purple

Editing a Worklist

A worklist can be renamed to make it more meaningful for you. Simply select the worklist from the left panel and click **Rename**.



The screenshot shows a sidebar on the left with 'RECORDS' and 'WORKLISTS' sections. Under 'WORKLISTS', the 'Red' worklist is selected. The main area displays a table with columns: NHS Number, Other Identifier, Other Identifier, Name, and Gender. The 'Red' label and 'Rename' button are circled in red. At the bottom, a 'Remove' button is also circled in red.

<input type="checkbox"/>	NHS Number	Other Identifier	Other Identifier	Name	Gender
<input type="checkbox"/>	-	1251666 (DHUFT RiO)	1251666 (DHUFT RiO)	ROBERTS, Hugh	Male
<input type="checkbox"/>	416 006 6348	HE00017044 (RBCHFT CaMIS)	HE00017044 (RBCHFT CaMIS)	RICHARD, GARNER	Male
<input type="checkbox"/>	485 337 9371	HE00017043 (RBCHFT CaMIS)	HE00017043 (RBCHFT CaMIS)	JORDAN, SARAH	Female
<input type="checkbox"/>	-	HE00011888 (RBCHFT CaMIS)	HE00011888 (RBCHFT CaMIS)	WHITE, SNOW	Female
<input type="checkbox"/>	570 020 0716	HE00017041 (RBCHFT CaMIS)	HE00017041 (RBCHFT CaMIS)	DODD, PATRICIA	Female
<input type="checkbox"/>	822 567 6149	HE00017042 (RBCHFT CaMIS)	HE00017042 (RBCHFT CaMIS)	ALICE, ROBERTS	Female
<input type="checkbox"/>	-	D802122 (DCHFT PCS)	D802122 (DCHFT PCS)	COPATH, Blake	Male

Remove None selected



Note

You can change the order of lists by clicking on the headings.

To remove a person from a worklist, tick the box next to their name to select them, then click on the **Remove** button.



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.