



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**

How to manage a patient's Actions in the DCR



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

Managing a patient's Actions in the DCR

This user guide will show you how to find a patient's **Actions** in the DCR, how to view and add notes under **Actions**, how to edit an existing **Action** and add a new **Action**.

- Health and social care practitioners can monitor patients' progress against their **Actions**.
- The practitioners or the patients need to update the progress made against these regularly.
- The practitioners and the patients also need to check the **Actions** regularly for any updates made as there are no notifications to inform them that there have been any changes/updates made.
- The **Actions** functionality is an **UNMONITORED** service which should only be used for routine, non-emergency, situations.

User Guide Content

1. How to find a patient's Goals and Actions in the DCR
2. An Action's status can vary from Active to Planned, Completed, On Hold or Cancelled
3. How to view and add notes under Actions
4. How to edit an Action, including how to link and unlink a related Goal from an Action
5. How to update the status of an Action: from Active to Planned, Completed, On Hold or Cancelled
6. How to add a new Action

There are additional User Guides at <https://news.dorsetcouncil.gov.uk/dcr-staff-area/how-to-guides/> to help with **how to log in to the DCR** and many others.

1. Finding a patient's Goals and Actions in the DCR



Access the citizen's DCR record either via single sign-on from the DCR tab/link within your current organisational system, or login via the DCR browser <https://prof.dorsetcarerecord.nhs.uk/concerto/Login.htm> and search for the patient.

The patient record opens on the **Summary** tab. **Goals and Actions** can be found on the left of the screen on the **Summary** or **my Dorset Care Record** tabs.

1 Summary Problem List Patient Task List Medications Viewer my Dorset Care Record Social Care

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
- Relationships and Contacts
- Assessment (8 / 8)
- Community (30 / 30)
- Correspondence (44 / 46)
- Primary Care (20 / 20)

Goals

Goal	START	Frequency	Due
Alcohol Reduction Added by Trevor CHAMPION on 05-Jan-2022	10 /d 28-FEB-22	8 /d 09-MAR-22	5 28-J
Blood Pressure Control For weekly measurements Added by Emma DAVIS on 22-Jan-2022	160/110 02-JAN-22	70/34 22-JAN-22	11 26-J
Healthy Eating Added by Trevor CHAMPION on 13-Feb-2023	X 13-FEB-23	✓ 14-FEB-23	30-J

2 my Dorset Care Record

Summary Problem List Patient Task List Medications Viewer my Dorset Care Record

- my Dorset Care Record Invitation
- Shared Files
- myDCR Health Library Tags
- myDCR Health Library
- Circle of Care
- Goals and Actions**

Goals Show All

Alcohol Reduction Added by Trevor CHAMPION on 05-Jan-2022	START 10 /d 28-FEB-22	8 /d 09-MAR-22	TARG 2 /d 30-JUN
Alcohol Reduction Agreed to have one drink at Christmas Added by Georgina HULBERT on 25-Aug-2021	START 4 /d 22-AUG-21	3 /d 16-NOV-21	2 /d 14-DEC
Blood Pressure Control For weekly measurements Added by Emma DAVIS on 22-Jan-2022	START 160/110 02-JAN-22		There are no progress
Effective Coping	START		

Actions Show All

- Attend CBT session**
Effective Coping

2. An Action's Status can vary from Active to Planned, Completed, On Hold or Cancelled

NOTE

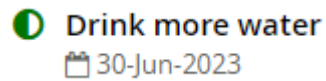
The **Actions** shown are all open/**Active Actions**, and the **half-filled green circle symbol** denotes that these actions are in progress.

Actions can also be **Planned**, **Completed**, **On Hold** or **Cancelled**. The **Actions** with any of these statuses are 'hidden' from the main page, so that on the main page only the **Active Actions** are shown.

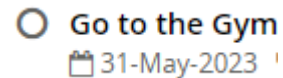
3 To see all actions, will all the different statuses, click on **Show All**. **Show All** will change to **Show Active**.

The **Actions** that are no longer **Active** will show respective badges.

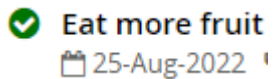
Active



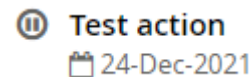
Planned



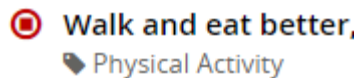
Completed






On Hold



Cancelled









Actions

-  Drink more water
30-Jun-2023
-  Eat more veg
31-Aug-2023
-  Go to the Gym
31-May-2023 Healthy Eating

Add Action

Show All

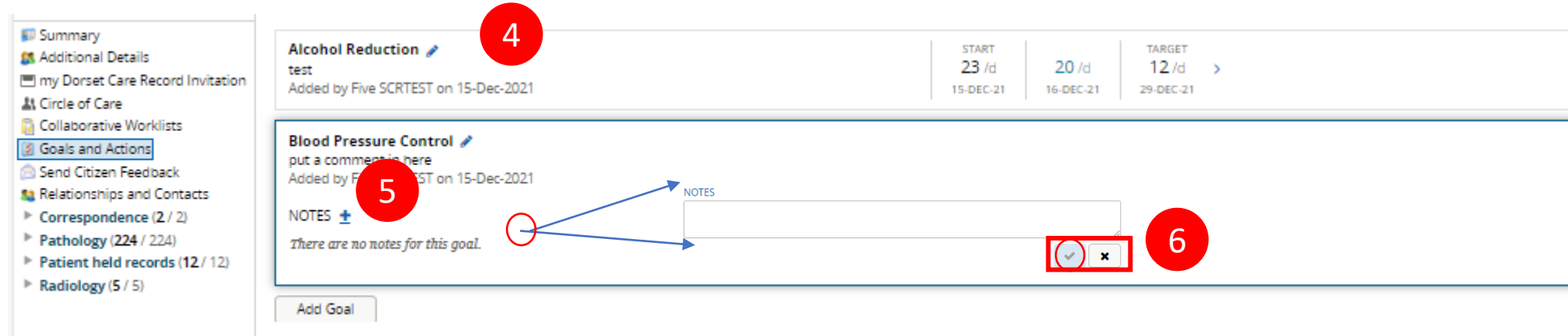
Actions

-  Drink more water
30-Jun-2023
-  Eat more veg
31-Aug-2023
-  Go to the Gym
31-May-2023 Healthy Eating
-  Test action
24-Dec-2021 Pain Control
-  Attend CBT session
Effective Coping
-  check feet daily
22-Jan-2022

Show Active

3. Viewing and Adding Notes under Actions

4 Click on any of the existing **Actions** to expand the box and view any **notes**.



The screenshot shows the Dorset Care Record interface. On the left is a sidebar with navigation options: Summary, Additional Details, my Dorset Care Record Invitation, Circle of Care, Collaborative Worklists, **Goals and Actions** (highlighted), Send Citizen Feedback, Relationships and Contacts, Correspondence (2 / 2), Pathology (224 / 224), Patient held records (12 / 12), and Radiology (5 / 5). The main panel displays two goal cards. The top card is 'Alcohol Reduction' with a test value of 23/d and a target of 12/d. The bottom card is 'Blood Pressure Control' with a comment 'put a comment is here'. Below the comment is a 'NOTES' section with a plus icon (circled in red and labeled 5), a text input box, and a close button (circled in red and labeled 6). A red circle labeled 4 points to the 'Blood Pressure Control' title. A red circle labeled 6 points to the close button.

5 To add **notes**, click on the **Plus symbol**.

Type in the notes in the free text box that appears and click on the **Tick**.

6 Click on **x Close** to minimise the box.

4. Editing an Action

NOTE

You can update the **Description** of your **Action**; link the **Action** to a **Related Goal**; update the **Action's Status** from **Active** to **Planned**, **Completed**, **On Hold** or **Cancelled**; and input a new **Review Date**.

7 Click on any of the existing **Actions** to expand the box and click on **Edit**. The **Edit Action** box opens up.

8 Edit the following as required
Description
Related Goals
Status
Review Date

More guidance on Related Goals and Status coming up next.

Actions Show All

Drink more water
30-Jun-2023
LAST UPDATED BY Sam Belhomme on 08-Jun-2023
Edit
NOTES +
There are no notes for this action.

Eat more veg
31-Aug-2023

Go to the Gym
31-May-2023 Healthv Fatine

Drink more water
30-Jun-2023

Edit Action

* Description

Related Goals +

Status

Review Date

Update Cancel

Editing an Action: Linking and Unlinking a Related Goal from an Action

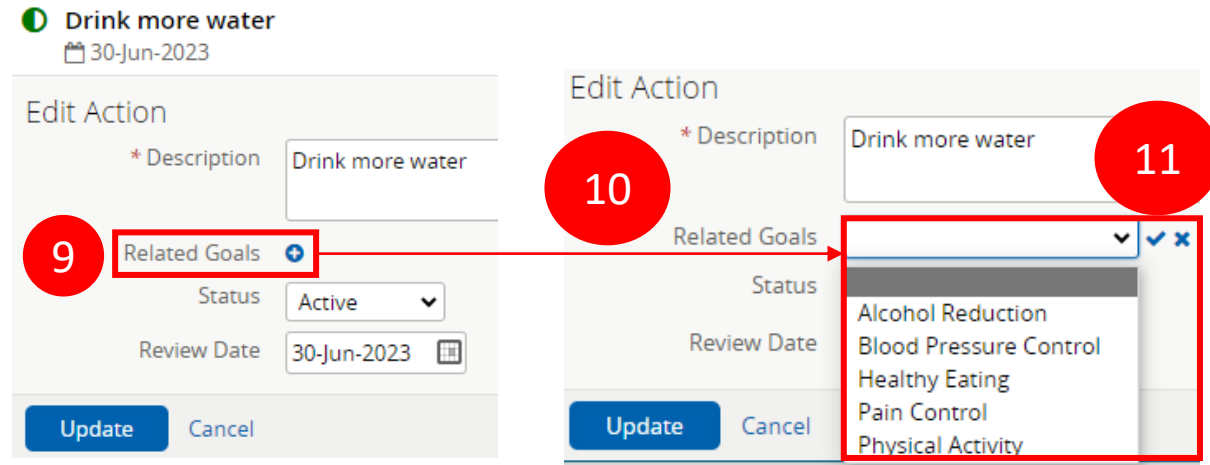
9 Click on the **Plus symbol** to the right of **Related Goals**.

10 Select a **Related Goal** from the drop-down box that appears.

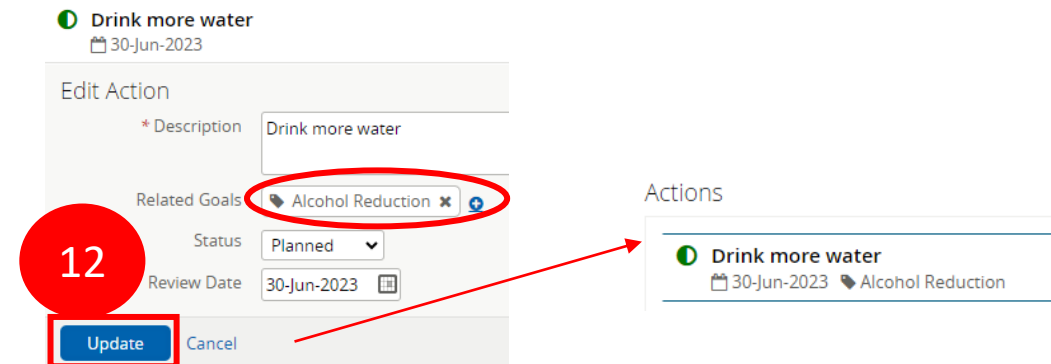
11 Click on the **Tick symbol** next to the drop-down box to link the action to the selected **Goal**.

A **Label symbol** now indicates that this **Action** has been linked to a **Related Goal**.

12 Click on **Update**.



The screenshot shows the 'Edit Action' form for 'Drink more water' (dated 30-Jun-2023). The 'Related Goals' dropdown menu is open, displaying a list of goals: Alcohol Reduction, Blood Pressure Control, Healthy Eating, Pain Control, and Physical Activity. A red box highlights the dropdown menu, and a red circle with the number 10 is placed over the dropdown arrow. Another red circle with the number 11 is placed over the tick icon in the top right corner of the dropdown menu.



The screenshot shows the 'Edit Action' form after the goal has been selected. The 'Related Goals' field now displays 'Alcohol Reduction' with a small label icon to its left. A red circle with the number 12 is placed over the 'Update' button. A red arrow points from the 'Update' button to the 'Actions' list on the right, which shows the action 'Drink more water' (dated 30-Jun-2023) with a label icon and 'Alcohol Reduction' listed below it.

Editing an Action: Linking and Unlinking a Related Goal from an Action



You can link the **Action** to as many **Related Goals** as required, by repeating the above process.

Start by clicking on the **Plus symbol**.

The screenshot shows the 'Edit Action' form with the following fields: Description: 'Drink more water', Status: 'Active', Review Date: '30-Jun-2023'. The 'Related Goals' section contains 'Alcohol Reduction' and a plus sign. A dropdown menu is open, showing options: 'Blood Pressure Control', 'Healthy Eating', 'Pain Control', and 'Physical Activity'. The 'Update' and 'Cancel' buttons are at the bottom.

13

To unlink a **Related Goal**,

Click on the **X** next to the **Related Goal** in the box, and

Click on **Update**.

The screenshot shows the 'Edit Action' form with the following fields: Description: 'Drink more water', Status: 'Active', Review Date: '30-Jun-2023'. The 'Related Goals' section contains 'Alcohol Reduction' and a plus sign. The 'Unlink Related Goal' button is highlighted. The 'Update' and 'Cancel' buttons are at the bottom.

5. Editing an Action: Updating the Action's Status from Active to Planned, Completed, On Hold or Cancelled

NOTE **Active** keeps the **Action** open and showing on the main **Actions** page. **Planned, Completed, On Hold** and **Cancelled** 'hide' the **Action**.

14 Click on the drop-down box next to **Status**, and select from: **Planned, Active, Completed, On Hold, Cancelled**.

When selecting **On Hold** or **Cancelled**, a mandatory box appears which requires you to provide a **Reason for Status**.

15 Click on **Update**.

16 Click on **x Close** to return to the collapsed view of **Actions**.

The image shows two screenshots of the 'Edit Action' form for 'Drink more water' (dated 30-Jun-2023). In the first screenshot, the 'Status' dropdown menu is open, showing options: Planned, Active, Completed, On Hold, and Cancelled. A red circle '14' is around the dropdown, and a red circle '14' is around the 'On Hold' option. In the second screenshot, the 'Status' is set to 'On Hold', and a red box highlights the '* Reason For Status' field. A red circle '15' is around the 'Update' button.

The image shows a screenshot of the 'Actions' list. The first action, 'Drink more water' (dated 30-Jun-2023), is expanded. It shows an 'Edit' button, a 'NOTES +' section with the text 'There are no notes for this action.', and a red circle '16' around the 'x Close' button. Below it are two other actions: 'Eat more veg' (dated 31-Aug-2023) and 'Go to the Gym' (dated 31-May-2023).

6. Adding a new Action

17 Scroll to the bottom of the list of **Actions** and click on **Add Action** to add a new action.

Actions Show All

- Attend CBT session
Effective Coping
- check feet daily
22-Jan-2022
- Drink 3 Fortisips a day
Increase Weight
- Eat high protein food
Increase Weight
- Walk and eat better, etc.
Physical Activity

Add Action

18 Complete the mandatory **Description** field.

19 Select a **Related Goal** to link the Action to - click on the **Plus** to reveal a drop-down selection box.

New Action

* Description Attend CBT session

19 Related Goals +

Status Active

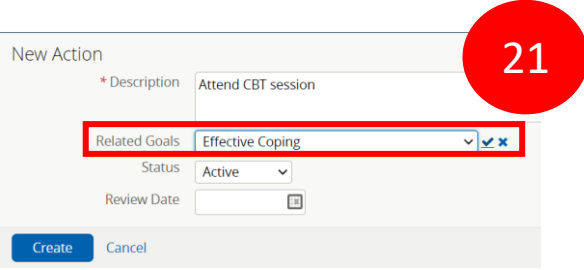
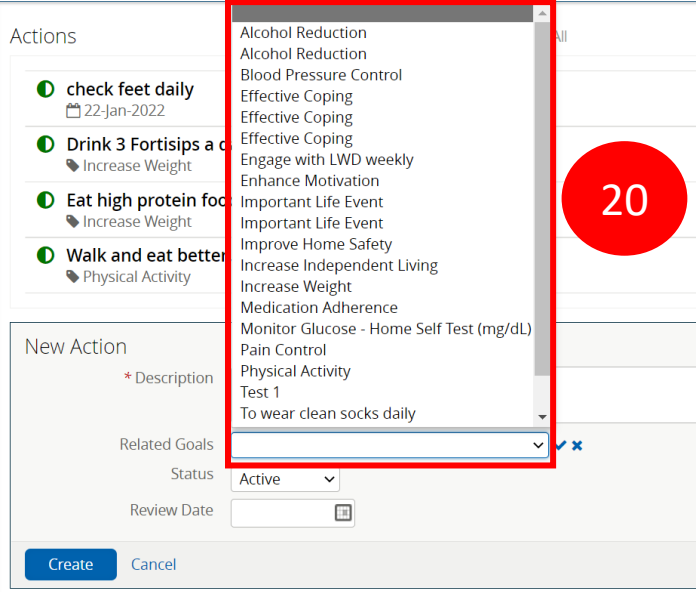
Review Date

Create Cancel

Adding a new Action

20 Click on a **Related Goal** to link the Action to from the drop-down box that appears.

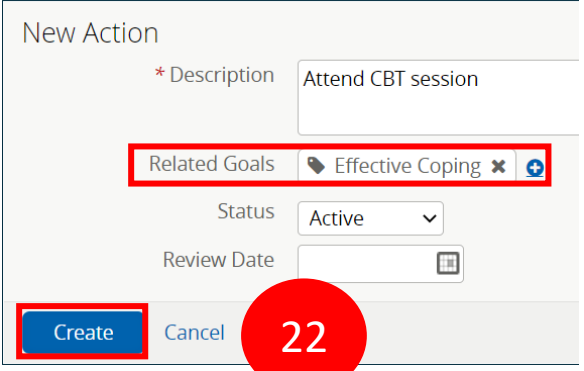
21 Click on the **Tick symbol** next to the drop-down box to link the action to the selected Goal.



A **Label symbol** now indicates that this **Action** has been linked to a **Related Goal**.

You can link the **Action** to as many **Related Goals** as required, by repeating the above process. Start by clicking on the **Plus symbol**.

To unlink a **Related Goal**, click on the **X** next to the **Related Goal** in the box.



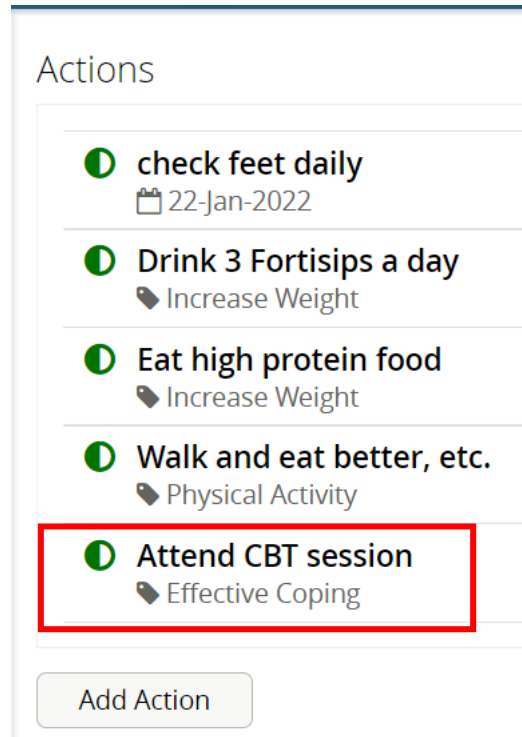
22 You can also set the **Status** and **Review Date**. Once all complete, click on **Create**.

Adding a new Action

23

The newly added **Action** will appear in the list of **Actions**.

If the **Action** has been linked to a **Goal**, the **Goal** will show under the **Action** in faint font and with a label symbol.

A screenshot of a user interface showing a list of actions. The list is titled 'Actions' and contains five items, each with a green circular icon containing a white letter 'D'. The first item is 'check feet daily' with a date '22-Jan-2022' below it. The second item is 'Drink 3 Fortisips a day' with a goal icon and the text 'Increase Weight' below it. The third item is 'Eat high protein food' with a goal icon and the text 'Increase Weight' below it. The fourth item is 'Walk and eat better, etc.' with a goal icon and the text 'Physical Activity' below it. The fifth item is 'Attend CBT session' with a goal icon and the text 'Effective Coping' below it. This fifth item is highlighted with a red rectangular border. At the bottom of the list is a button labeled 'Add Action'.

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.