



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 Goals in the DCR



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

Managing a patient's Goals in the DCR

This user guide will show you how to find a patient's **Goals** in the DCR, how to view and add notes and comments under **Goals**, how to add and set a new **Goal**, as well as how to edit and update existing **Goals**.

- Health and social care practitioners can monitor patients' progress against their **Goals** e.g. reduce high blood pressure or glucose levels.
- The practitioners or the patients need to update the progress made against these regularly.
- The practitioners and the patients also need to check regularly for any updates made as there are no notifications to inform them that there have been any changes/updates made.
- The **Goals** 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. A Goal's status can vary from Active to Achieve to Cancelled
3. How to view and add notes under Goals
4. How to view and add comments under Goals
5. How to input updates/record progress to existing Goals
6. How to record progress for existing Goals when the Target Date has passed
7. How to update the status of a Goal: from Active to Achieved or Cancelled
8. How to add and set a new Goal

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**, how to record a **Discussion to View**, 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	Target
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. A Goal's Status can vary from Active to Achieved or Cancelled

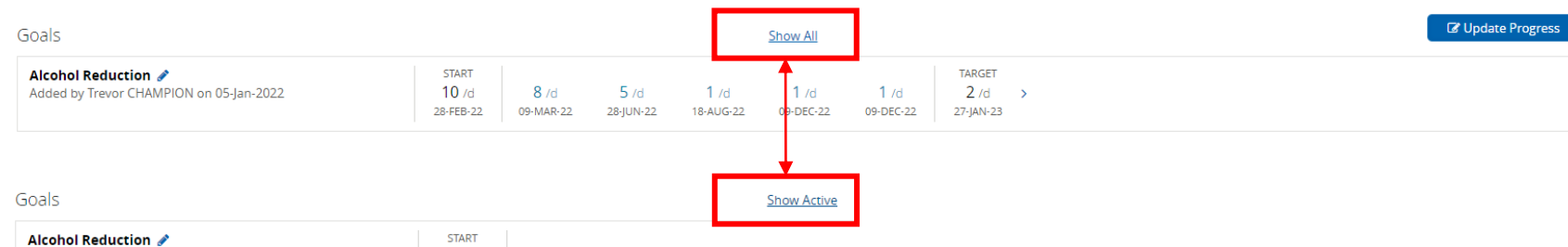
NOTE

The **Goals** shown on the main page are all open/**Active Goals**.

Goals can also be **Achieved** or **Cancelled**. The **Goals** with any of these statuses are 'hidden' from the main page.

3

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



The screenshot shows two instances of the 'Goals' section. The top instance shows a goal titled 'Alcohol Reduction' with a progress bar and a 'Show All' button highlighted in a red box. The bottom instance shows the same goal with a 'Show Active' button highlighted in a red box. A red double-headed arrow indicates the transition between the two buttons.


Alcohol Reduction	START	8 /d	5 /d	1 /d	1 /d	1 /d	TARGET
Added by Trevor CHAMPION on 05-Jan-2022	28-FEB-22	09-MAR-22	28-JUN-22	18-AUG-22	09-DEC-22	09-DEC-22	27-JAN-23

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

Achieved

Engage with LWD weekly 
Citizen needs to lose weight and has been sign
Added by Theresa BARTON on 15-Dec-2021

Cancelled

Alcohol Reduction 
Agreed to have one drink at Christmas
Added by Georgina HULBERT on 25-Aug

3. Viewing and Adding Notes under Goals

4 Click on any of the existing **Goals** to expand the box and view any **NOTES**.

CHAMPION, Trevor (Mr)
 BORN 04-May-1967 (56y) GENDER Male
 ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste... HOME
 GP PRACTICE CANFORD HEATH GROUP PRACT
 NHS Number 491 167 7333
 PDS 4911677333
 Laura BONNER LOGOUT

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
 Community (30 / 30)
 Correspondence (29 / 40)
 Discussion to View (8 / 11)
 Primary Care (20 / 20)

Goals Show All Update Progress

Goal	START	8 /d	5 /d	1 /d	1 /d	1 /d	TARGET
Alcohol Reduction Added by Trevor CHAMPION on 05-Jan-2022	10 /d 28-FEB-22	8 /d 09-MAR-22	5 /d 28-JUN-22	1 /d 18-AUG-22	1 /d 09-DEC-22	1 /d 09-DEC-22	2 /d 27-JAN-23
Blood Pressure Control For weekly measurements Added by Emma DAVIS on 22-Jan-2022	160/110 02-JAN-22	70/34 22-JAN-22	110/80 26-JUN-23	150/100 30-JUN-23	TARGET 140/90 01-JAN-24		
Healthy Eating Added by Trevor CHAMPION on 13-Feb-2023	START 13-FEB-23	✓ 14-FEB-23	✗ 30-JUN-23				

5 Click on the **Plus symbol** to add **NOTES**.

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

Goals Show All Update Progress

Alcohol Reduction
 Added by Trevor CHAMPION on 05-Jan-2022

START 10 /d TARGET 2 /d

NOTES +

There are no notes for this goal.

8 drinks/day Trevor CHAMPION

Close

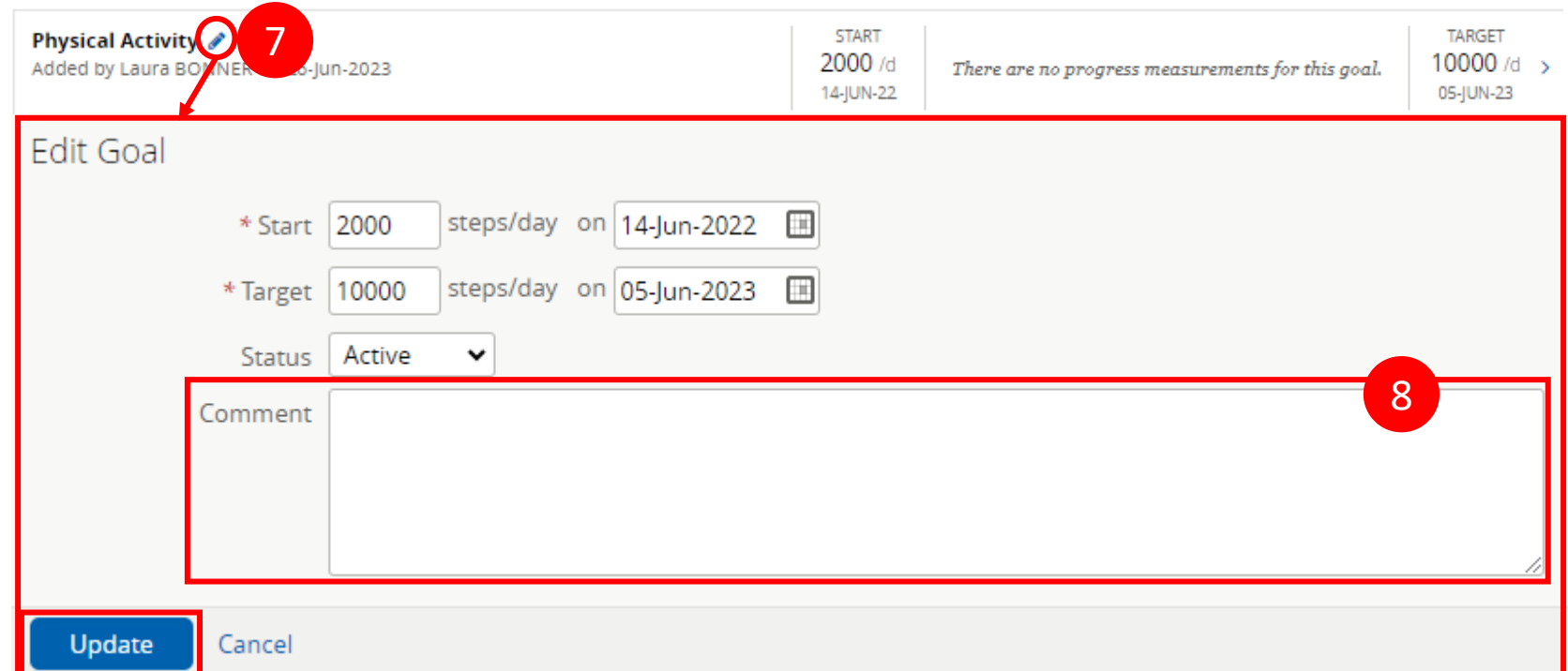
6 Click on **x Close** to minimise the box.

4. Viewing and Adding Comments under Goals

7 Click on the **crayon** to the right of the **Goal's** title. This opens the **Edit Goal** box.

8 Type in your Comment.

9 Click on **Update**.



The screenshot shows the 'Edit Goal' interface for a goal titled 'Physical Activity'. The goal was added by Laura BOMNER on 14-Jun-2023. The start date is 14-JUN-22 with a target of 2000 /d. The target date is 05-JUN-23 with a target of 10000 /d. The status is 'Active'. The progress is 'There are no progress measurements for this goal.' The interface includes a 'Comment' text area and 'Update' and 'Cancel' buttons. Red callouts are placed over the edit icon (7), the comment text area (8), and the 'Update' button (9).

Physical Activity	START	TARGET
Added by Laura BOMNER 14-Jun-2023	2000 /d 14-JUN-22	10000 /d 05-JUN-23

There are no progress measurements for this goal.

Edit Goal

* Start 2000 steps/day on 14-Jun-2022

* Target 10000 steps/day on 05-Jun-2023

Status Active

Comment

Update Cancel

5. Updating Progress/Adding new Data to existing Goals

Goals

Show All

10

Click on **Update Progress** to add new data to any of the existing **Goals**.

Alcohol Reduction

Added by Trevor CHAMPION on 05-Jan-2022

START		TARGET	
10 /d	8 /d	2 /d	>
28-FEB-22	09-MAR-22	30-JUN-22	

Goals

Show All

DATE 28-Feb-2022

Alcohol Reduction

Added by Trevor CHAMPION on 05-Jan-2022

START		TARGET	
10 /d	8 /d	2 /d	>
28-FEB-22	09-MAR-22	30-JUN-22	

drinks/day

Alcohol Reduction

Agreed to have one drink at Christmas
Added by Georgina HULBERT on 25-Aug-2021

START		TARGET		TARGET	
4 /d	2 /d	12 /d	3 /d		>
22-AUG-21	15-DEC-21	18-DEC-21	30-DEC-21	31-DEC-21	

drinks/day

11

Input new data in the boxes to the right of each the **Goals**; The **Update Progress** box has been replaced by the Date box, where you can select the date required.

Weight Management (lbs)

need to lose weight
Added by Trevor CHAMPION on 23-Nov-2021

START		TARGET	
200 lbs	199 lbs	180 lbs	50-75 lbs >
24-NOV-21	15-DEC-21	22-JAN-22	

lbs

Weight Reduction (lbs)

Added by Theresa SMITH on 15-Dec-2021

START		TARGET	
200 lbs	199 lbs	150 lbs	>
15-DEC-21	15-DEC-21	29-DEC-21	

lbs

12

Click on the **Tick** button at the bottom of the page to save the new data, or on the **X** to cancel.

Add Goal

6. Updating existing Goals when the Target Date has passed



NOTE If you have provided a **Progress Update** for a **Goal** and this is not showing, this might be happening when the **Target Date** has passed. You will therefore need to update the **Target Date** to a new date in the future. Updating the **Target Date** will automatically show the **Progress Update**.

13 You can change the current Target End Date e.g. from 05-Jun-23 to 30-Jun-23, by clicking on the **crayon** to the right of the **Goal**'s title. This opens the **Edit Goal** box.

14 Select a **new date in the future** under the *Target line e.g. 30-Jun-2023 instead of 05-Jun-2023.

15 Click on **Update**.

The **Goal** will be updated with the new future Target date and include the update previously provided.

The screenshot shows the 'Edit Goal' interface for a 'Physical Activity' goal. At the top, the goal title 'Physical Activity' has a blue crayon icon next to it, which is circled in red and labeled '13'. Below the title, the goal details are shown: 'Added by Laura BONNER on 26-Jun-2023', 'START 2000 /d 14-JUN-22', and 'TARGET 10000 /d 05-JUN-23'. The main 'Edit Goal' form contains the following fields: '* Start 2000 steps/day on 14-Jun-2022', '* Target 10000 steps/day on 05-Jun-2023' (this line is highlighted with a red box and labeled '14'), 'Status Active', and a 'Comment' text area. At the bottom of the form, there are 'Update' and 'Cancel' buttons, with 'Update' also highlighted with a red box. Below the form, the updated goal summary is shown: 'Physical Activity', 'Added by Laura BONNER on 26-Jun-2023', 'START 2000 /d 14-JUN-22', and 'TARGET 10000 /d 30-JUN-23'. The new target date '30-JUN-23' and the new progress value '8500 /d 26-JUN-23' are highlighted with red boxes.

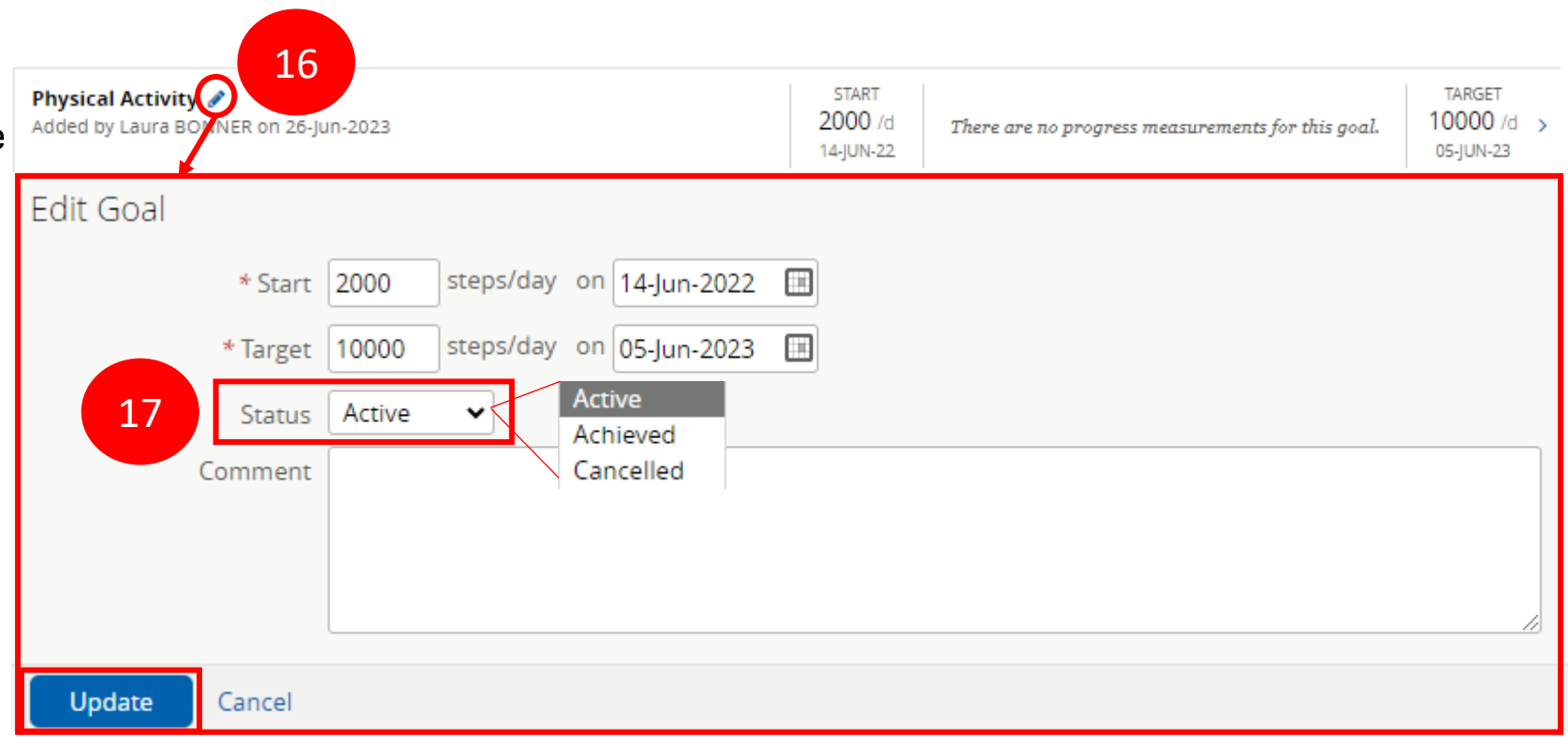
7. Updating the status of a Goal: From Active to Achieved or Cancelled

NOTE **Active** keeps the goal open and showing on the main Goals page. **Achieved** and **Cancelled** 'hide' the goal, so that on the main page only the Active goals are shown.

16 Click on the **crayon** to the right of the **Goal's** title. This opens the **Edit Goal** box.

17 Click on the drop-down box next to **Status**, and select from **Active**, **Achieved** or **Cancelled**.



18 Click on **Update**.



The screenshot shows the 'Edit Goal' interface for a goal titled 'Physical Activity'. At the top, the goal title is followed by a blue crayon icon (annotated with a red circle '16') and a pencil icon. Below the title, it says 'Added by Laura BOMNER on 26-Jun-2023'. To the right, there are fields for 'START' (2000 /d on 14-JUN-22) and 'TARGET' (10000 /d on 05-JUN-23). A note below the target says 'There are no progress measurements for this goal.' The main area is titled 'Edit Goal' and contains a form with the following fields: '* Start' (2000 steps/day on 14-Jun-2022), '* Target' (10000 steps/day on 05-Jun-2023), and a 'Status' dropdown menu (annotated with a red circle '17') currently set to 'Active'. The dropdown menu is open, showing options: 'Active', 'Achieved', and 'Cancelled'. Below the status field is a 'Comment' text area. At the bottom of the form are two buttons: 'Update' and 'Cancel'.

8. Adding and Setting a new Goal

19 Click on **Add Goal** to add a new goal.

Weight Management (lbs)  need to lose weight Added by Trevor CHAMPION on 23-Nov-2021	START 200 lbs 24-NOV-21	199 lbs 15-DEC-21	180 lbs 22-JAN-22	TARGET 50-75 lbs >
Weight Reduction (lbs)  Added by Theresa SMITH on 15-Dec-2021	START 200 lbs 15-DEC-21	199 lbs 15-DEC-21	TARGET 150 lbs >	

Add Goal

20 Select a **Goal** from the drop-down list or select the **Custom** option.

Select from Library

- Alcohol Reduction
- Blood Pressure Control
- Cholesterol Reduction (Total Cholesterol)
- Disease Monitoring & Self Management
- Effective Coping
- Enhance Motivation
- Healthy Eating
- Important Life Event
- Improve Home Safety
- Increase Independent Living
- Medication Adherence
- Monitor Glucose - Home Self Test (mg/dL)
- Pain Control
- Physical Activity
- Reduce A1c (%)
- Smoking Cessation
- Weight Management (lbs)
- Weight Reduction (lbs)
- Custom**

New Goal

Goal Type Select from Library ▾

Create Cancel

The **Goals** in the drop-down list will have prepopulated mandatory fields that you will need to complete before creating a new **Goal**.

If you select the **Custom** option, you will need to specify a name and a measure for the **Custom Goal**.

New Goal

Goal Type Custom ▾

*** Custom Goal Name**

*** How to Measure** Select Measure ▾

Create Cancel

Setting a new Goal

21

Complete the **Mandatory Fields**, where each Goal has different measurements, and click on the **Create** button.

New Goal

Goal Type

* Start steps/day on

* Target steps/day on

Comment

Create Cancel

New Goal

Goal Type



* On Track

Comment

Create Cancel

22

The newly added **Goal** will appear in alphabetical order in the list of **Goals**.

<p>Increase Independent Living </p> <p>Added by Trevor CHAMPION on 24-Feb-2022</p>	<p>START</p> <p></p> <p>24-FEB-22</p>	<p><i>There are no progress measurements for this goal.</i> ></p>
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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.