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

Dorset Care Record

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

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2. A Goal's status can vary from Active to Achieve to Cancelled
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5. How to input updates/record progress to existing Goals
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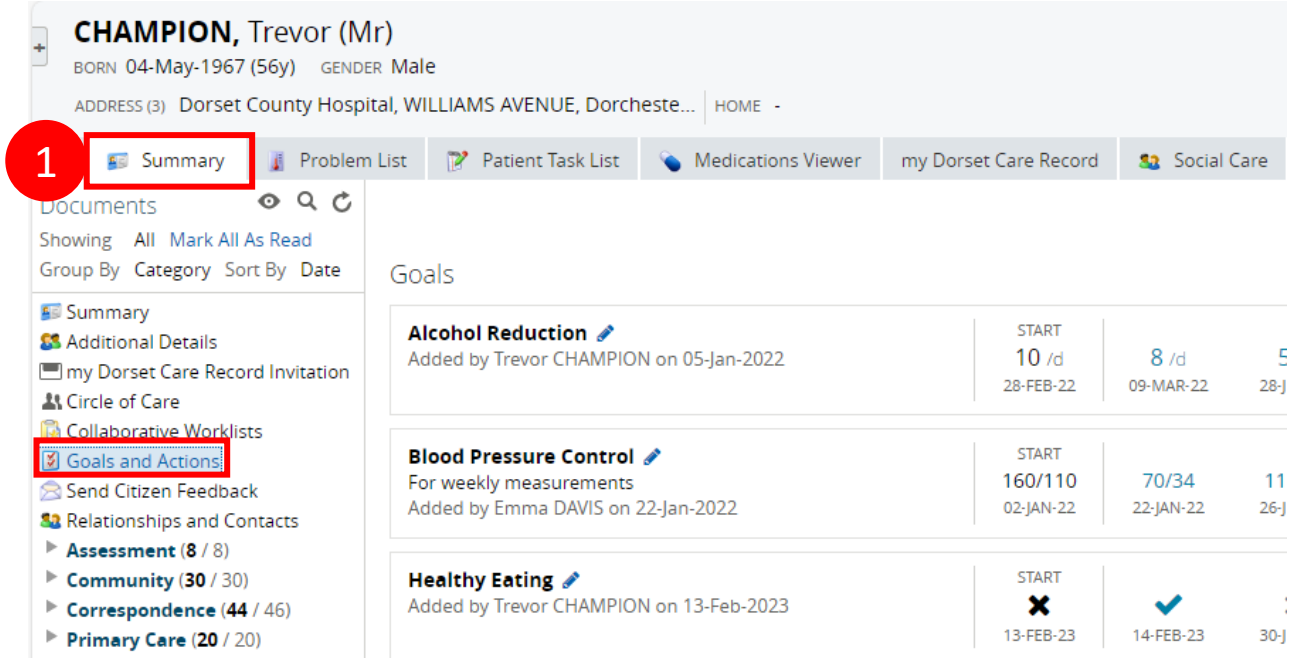
7. How to update the status of a Goal: from Active to Achieved or Cancelled
8. How to add and set a new Goal

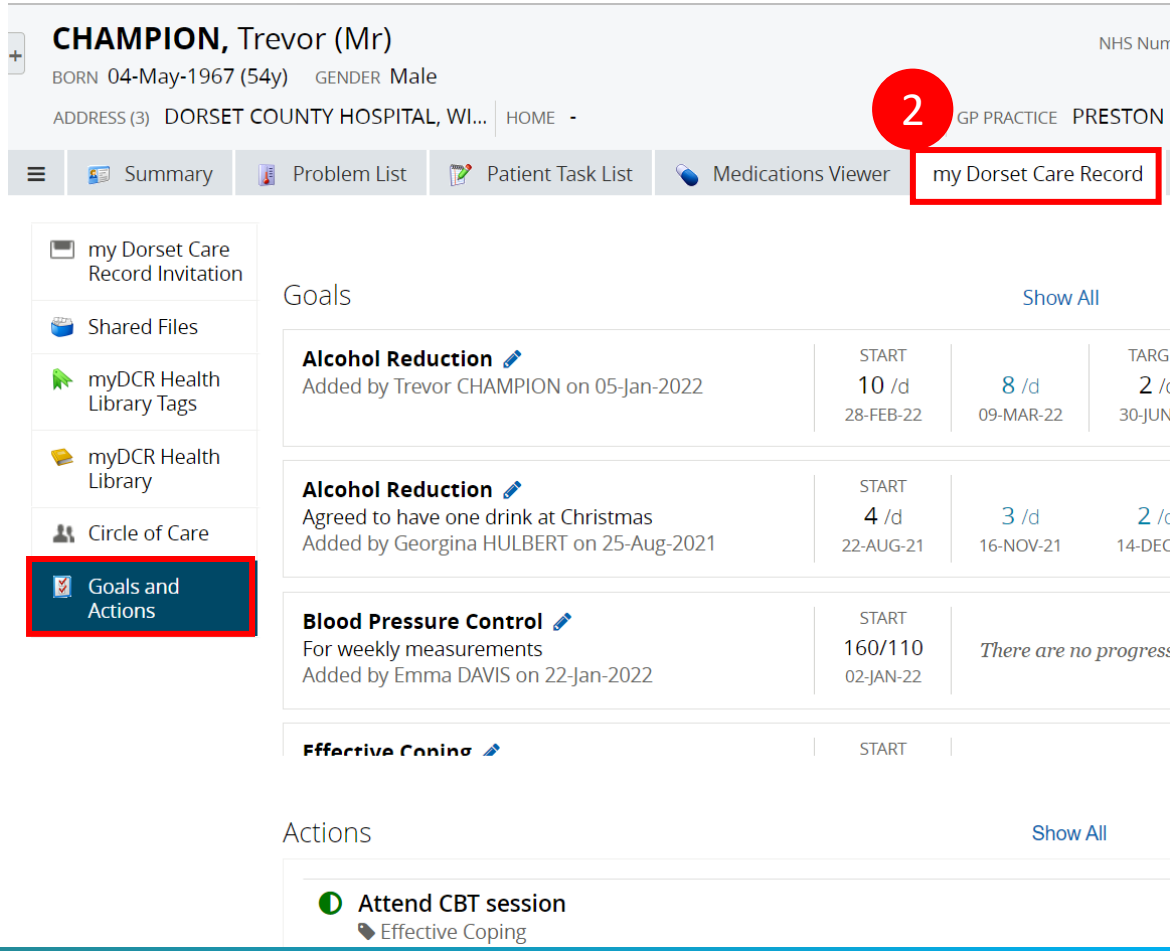
There are additional User Guides at https://news.dorsetcouncil.gov.uk/dcr-staff-area/how-to-guides/ to help with **how to log in to the DCR**, how to record a **Discussion to View**, and many others.

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.





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**.

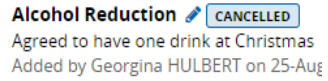
Goals can also be **Achieved** or **Cancelled**. The **Goals** with any of these statuses are 'hidden' from the main page.

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

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

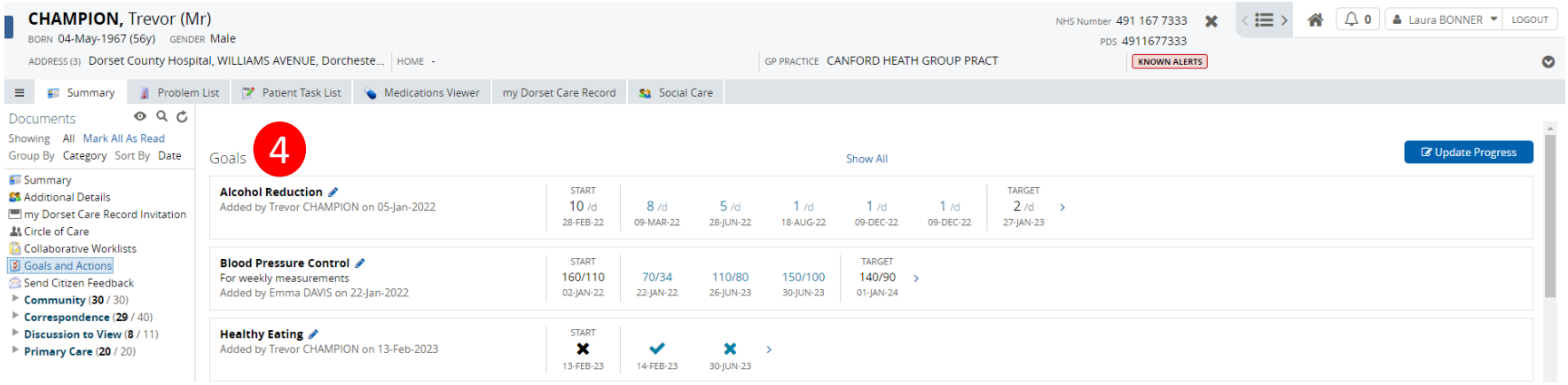
Achieved

Cancelled



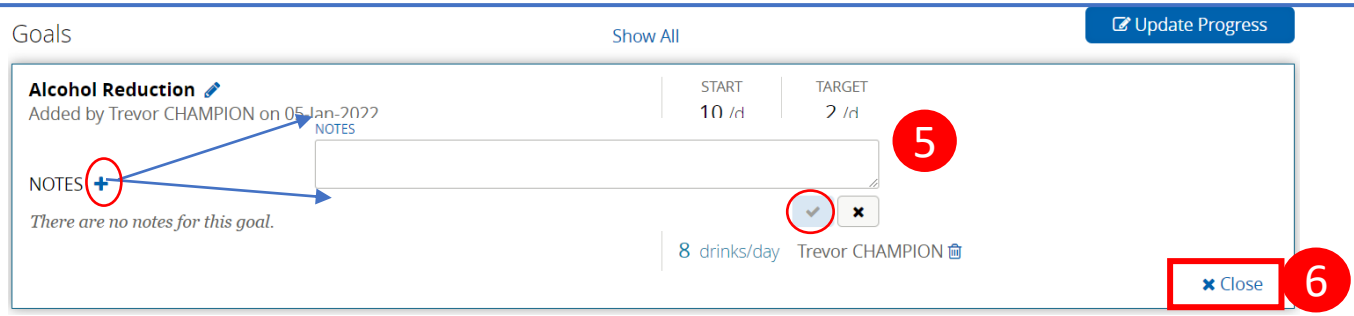
3. Viewing and Adding Notes under Goals

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



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**.



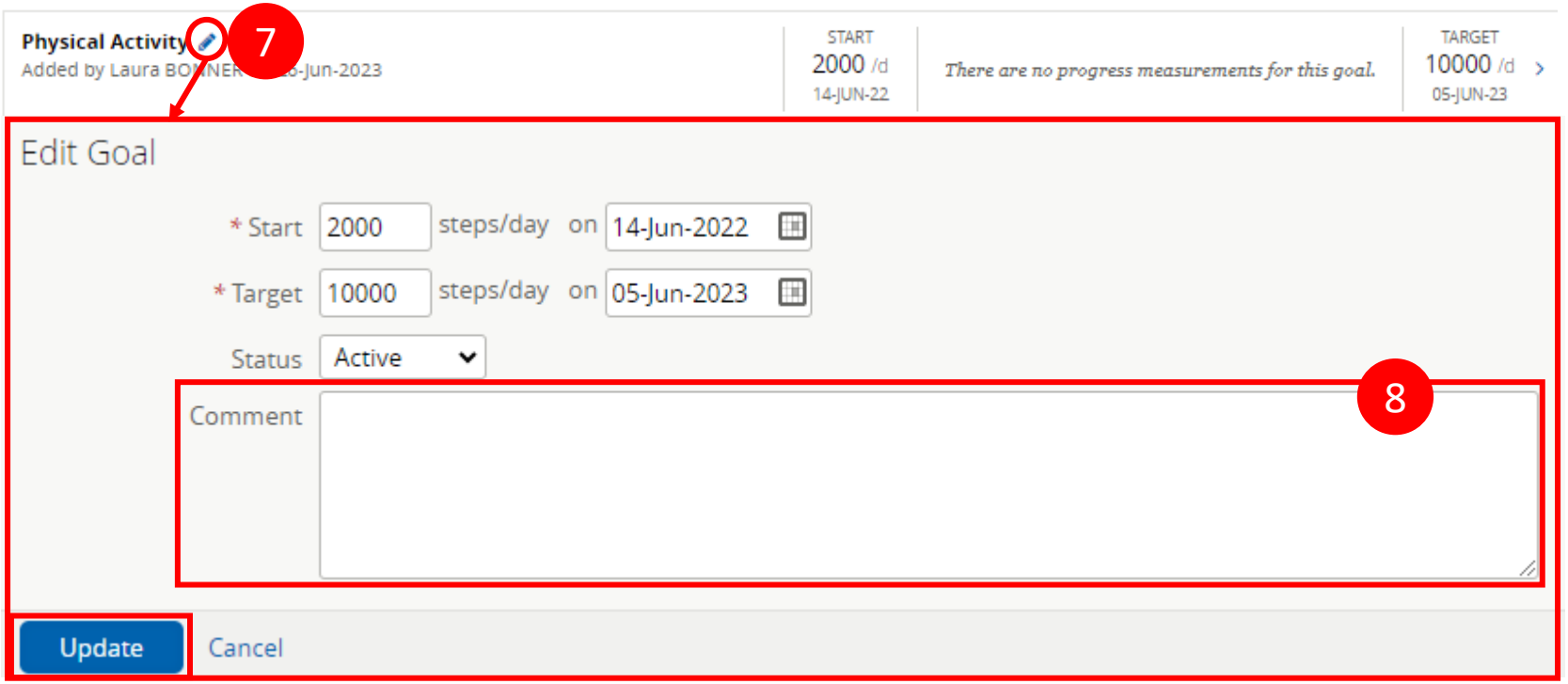
6 Click on **x Close** to minimise the box.

4. Viewing and Adding Comments under Goals

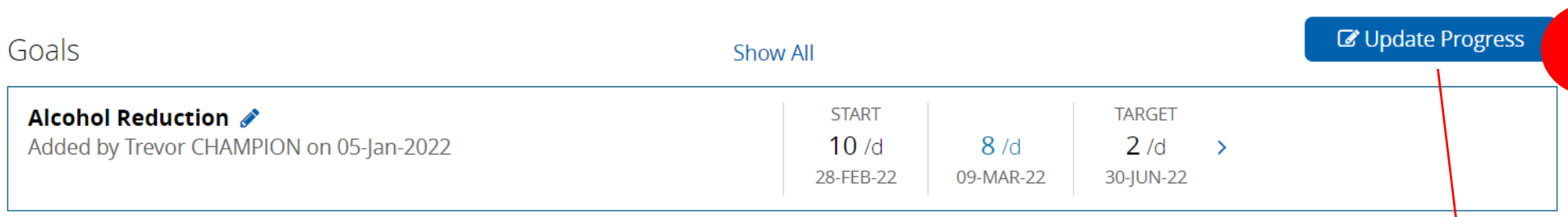
7 Click on the **crayon** to the right of the **Goal**'s title. This opens the **Edit Goal** box.

8 Type in your Comment.

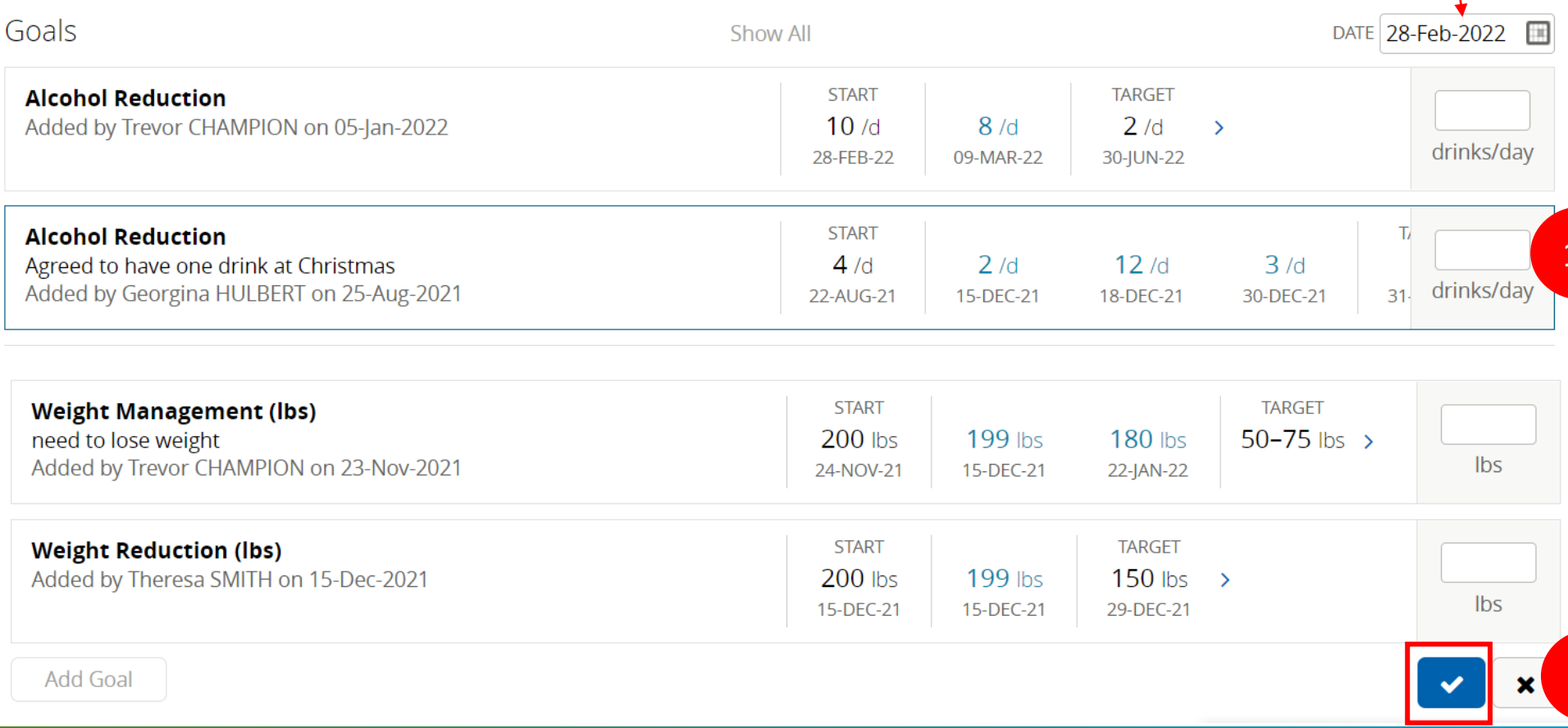
9 Click on **Update**.



5. Updating Progress/Adding new Data to existing Goals



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



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.

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

6. Updating existing Goals when the Target Date has passed

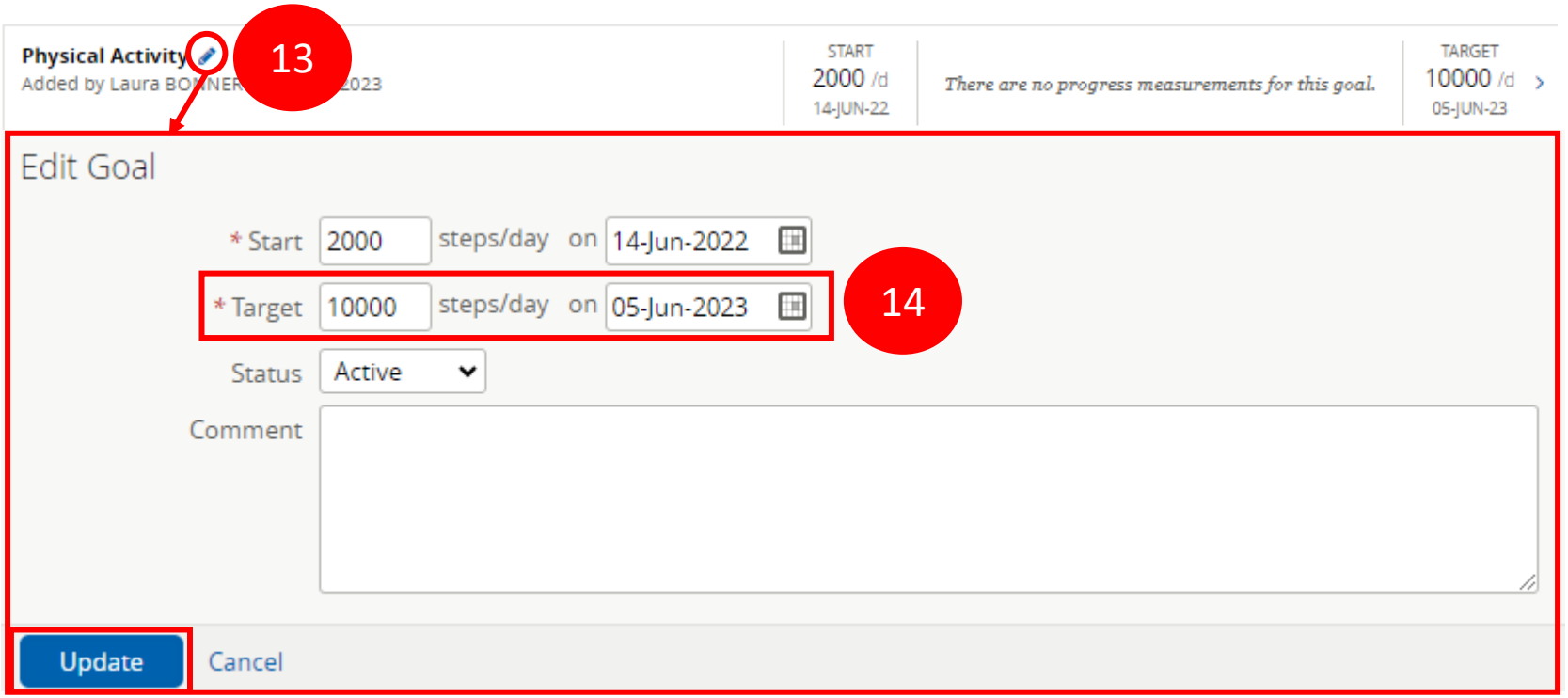
NOTE

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**.

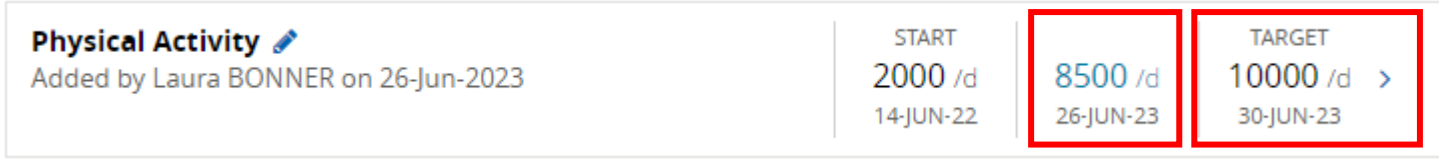
13 You can change the current Target End Date e.g. from 05-Jun-23 to 30-Jun-23, by clicking on the **crayon** to the right of the **Goal**'s title. This opens the **Edit Goal** box.

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.



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

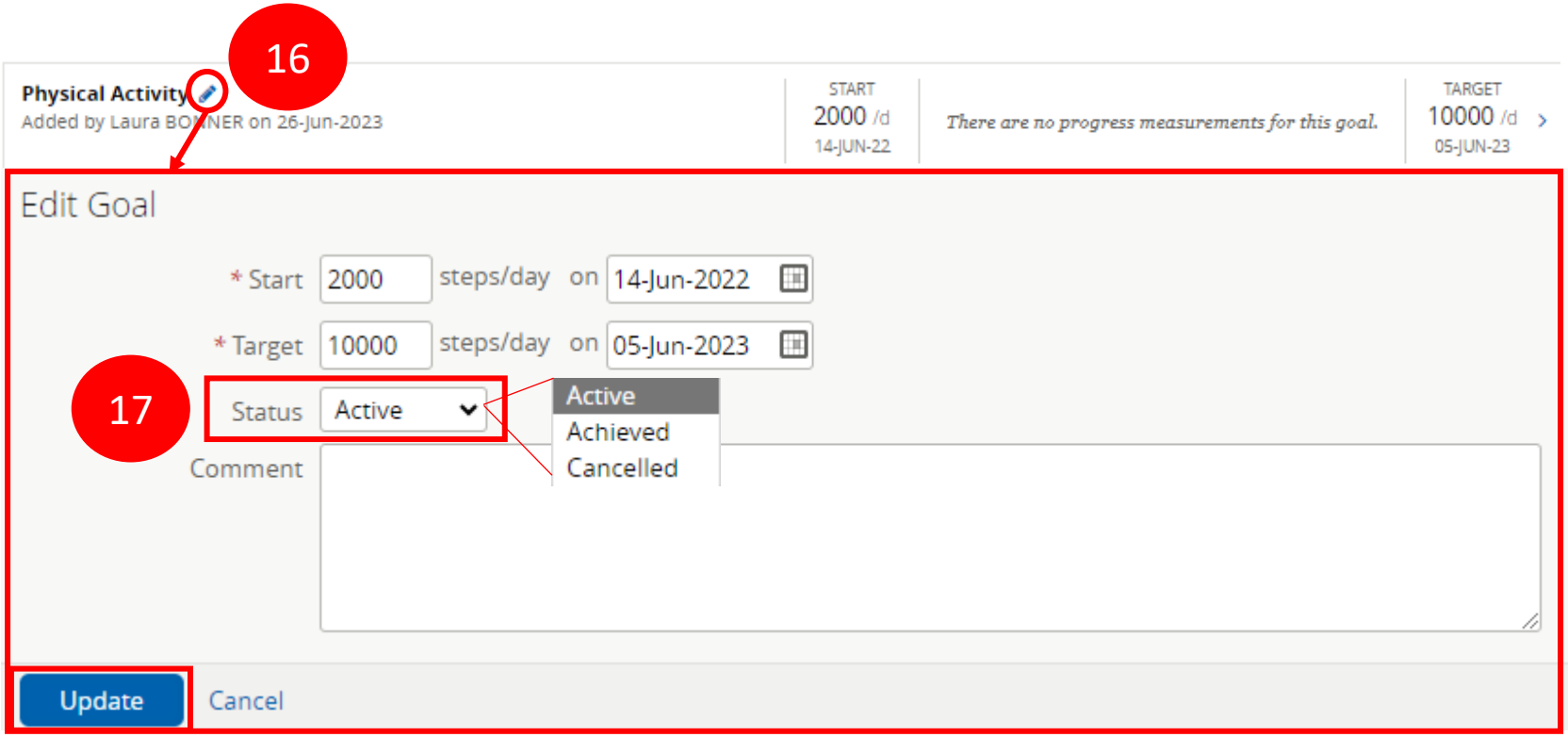
NOTE

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.

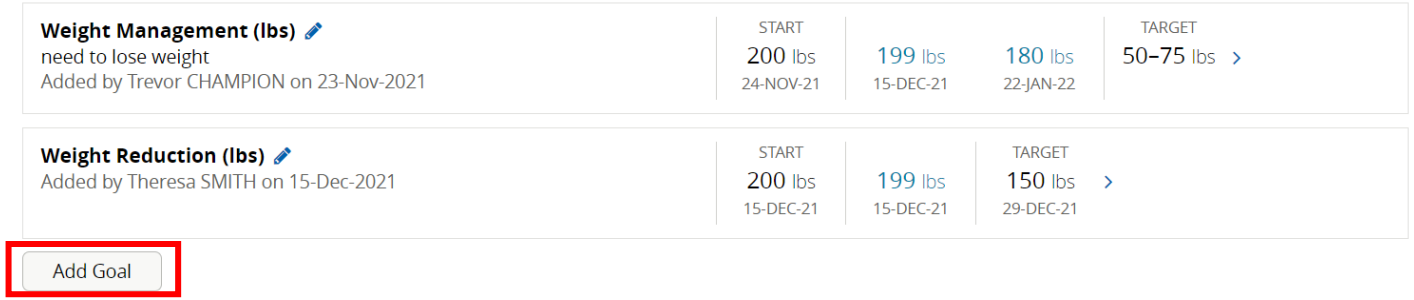
17 Click on the drop-down box next to **Status**, and select from **Active**, **Achieved** or **Cancelled**.

18 Click on **Update**.

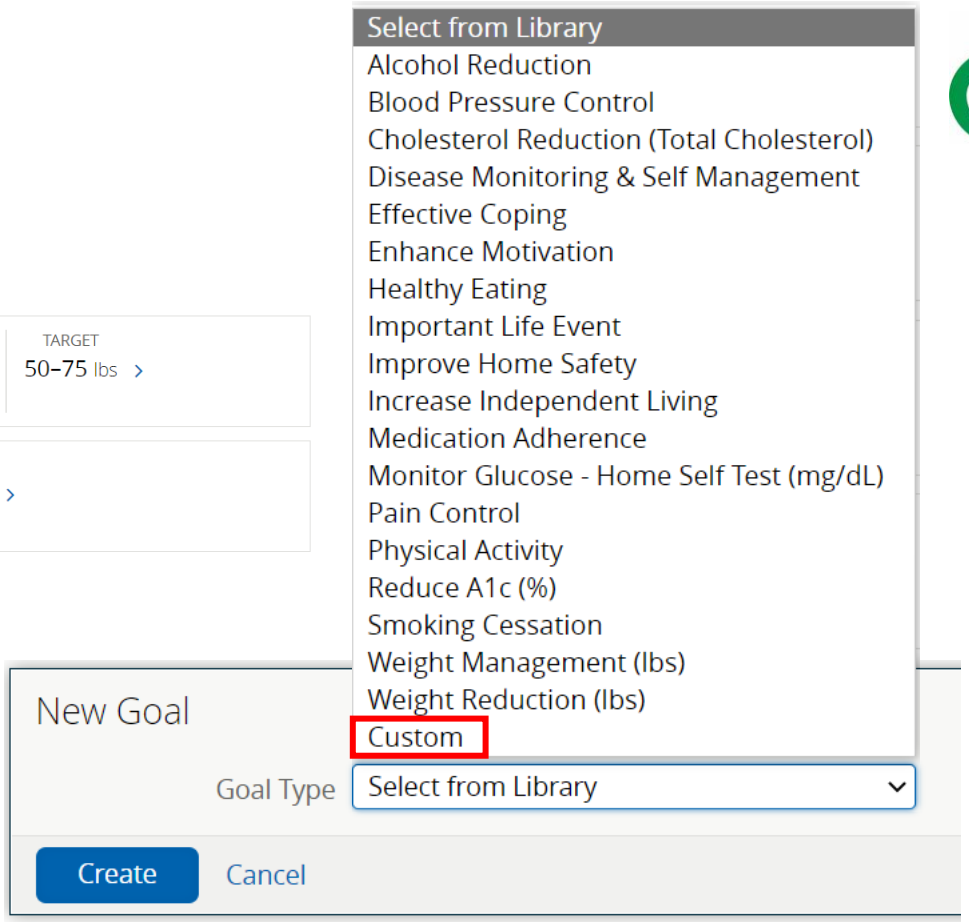


8. Adding and Setting a new Goal

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

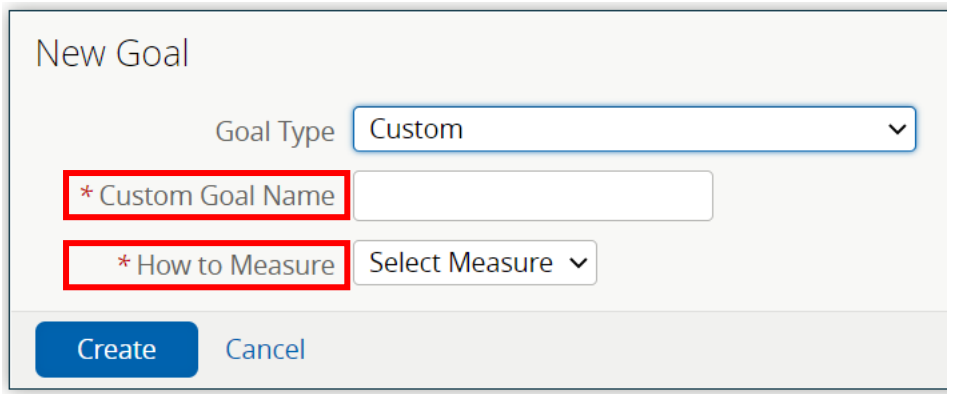


20 Select a **Goal** from the drop-down list or select the **Custom** option.



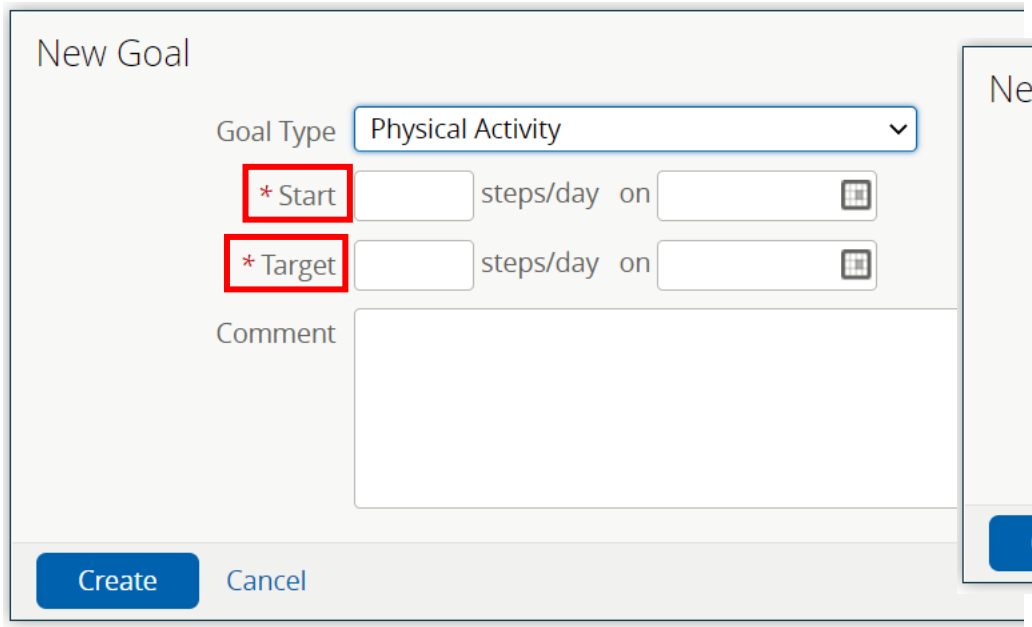
The **Goals** in the drop-down list will have prepopulated mandatory fields that you will need to complete before creating a new **Goal**.

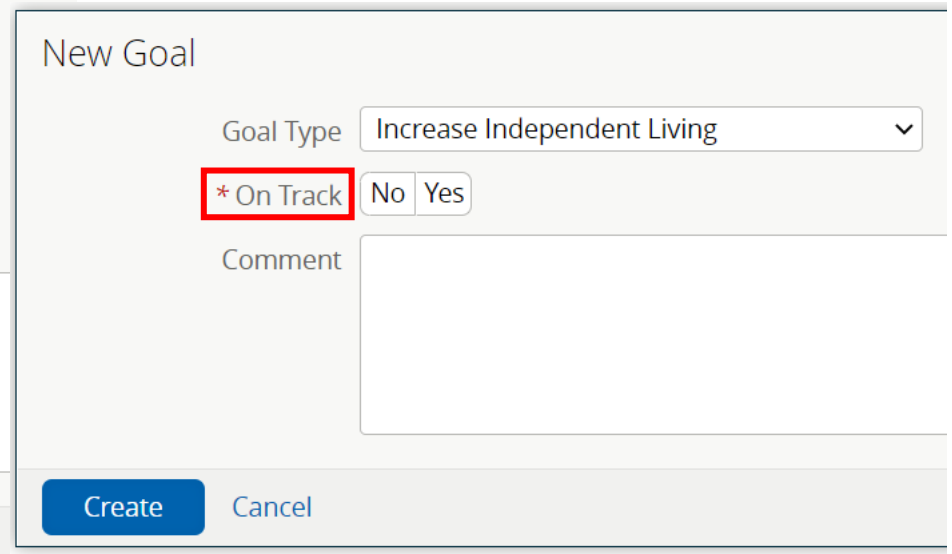
If you select the **Custom** option, you will need to specify a name and a measure for the **Custom Goal**.



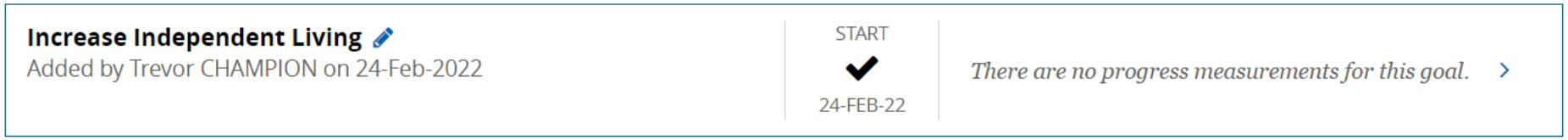
Setting a new Goal

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





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



Access further **support and information** from
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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.