Worklists User Guide

In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS South West London

Contents

1. Introduction and adding patients to worklist
2. Functionality overview
3. Content details by columns
4. Removing patients from worklists
5. Frequently asked questions

Introduction and adding patients to worklist

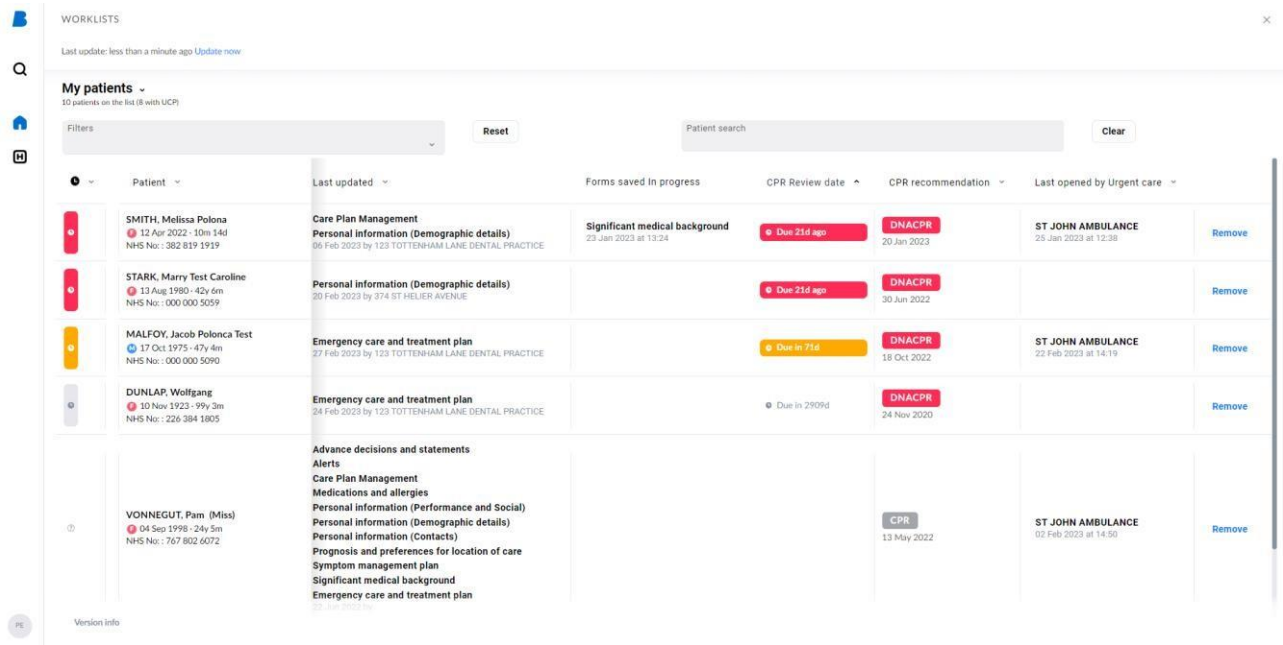
In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS
South West London

Introduction

- The Better Worklists functionality enables users to track patients, activities and tasks around their universal care plans on user level or workplace level.
- Worklists can be built on user level by displaying patients that have been marked as My patient or on an organisation level where the system displays patients that are assigned to user's organisation.

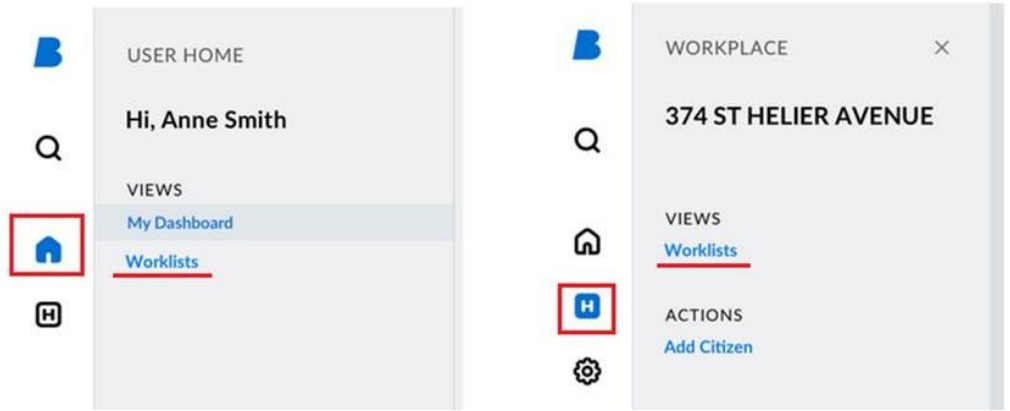


* To note* When opening patient list for the first time, it may take up to 10 minutes to load.

Accessing the worklist views

Users can access worklists on the UCP **web portal only** via:

- User dashboard module (home icon)
- Workplace module (H icon)



Users need to have the following roles to be able to access worklists:

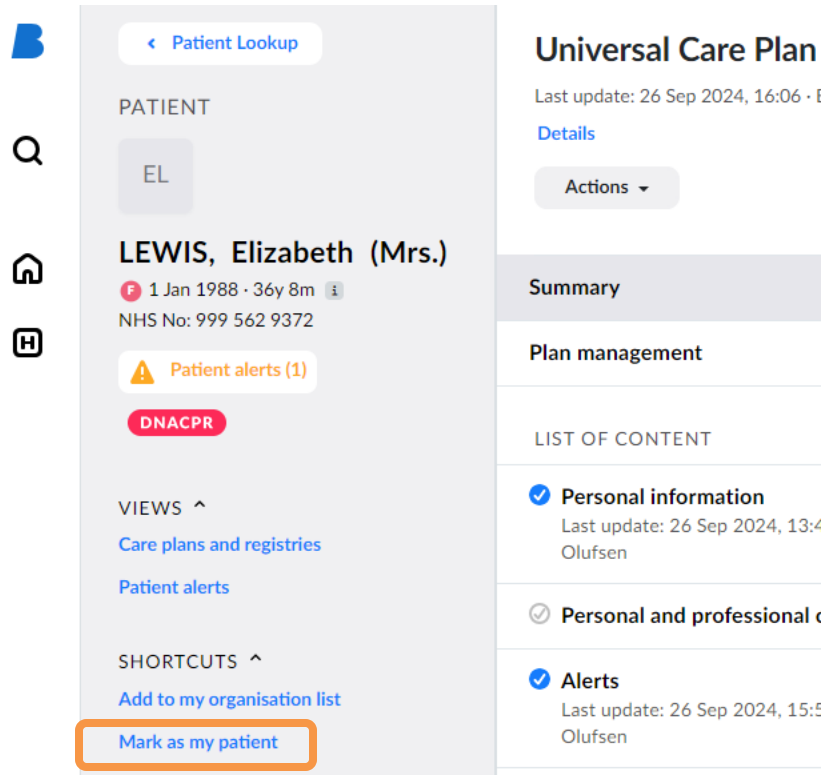
- Clinician
- Non-clinician

Based on point of access, default view is displayed:

- When user navigates from **user dashboard** to worklists functionality, default view is My patients list.
- When user navigates from **workplace module** to worklists functionality, default view is My organisation list.

My Patients worklist view

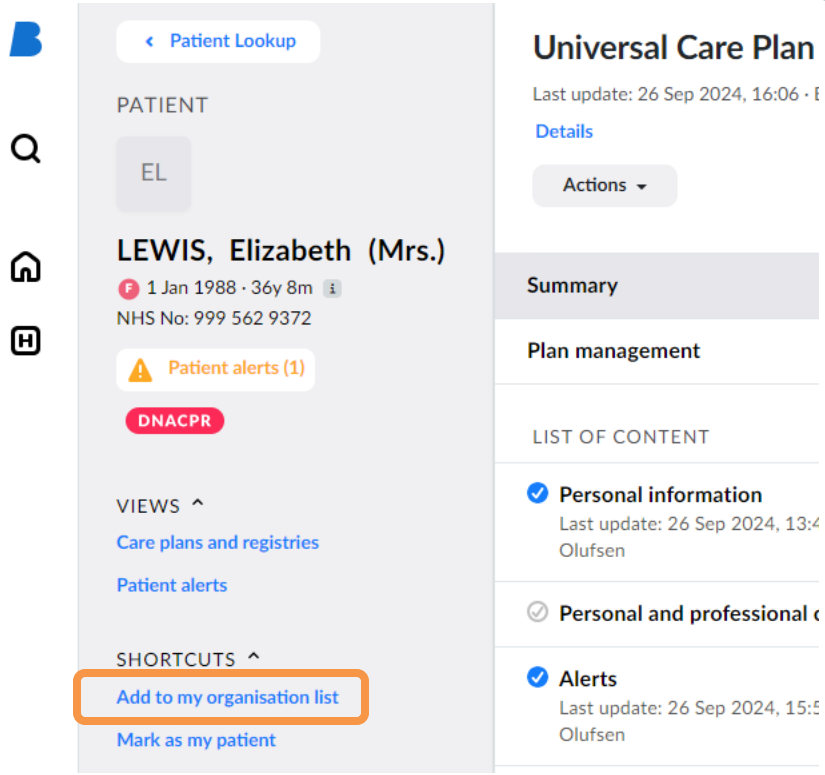
- You can add a patient to your My patients list by clicking mark as my patient which is available on patient dashboard within the section SHORTCUTS.
- Only the user will see this list.
- Only patients that have an active care plan or whose care plan was never started will be displayed.



My Organisation list

Adding to My organisation List depends on which organisation you work for:

- If you work for a GP Practice your list of patients with a UCP will automatically be added to your My organisation list based on information retrieved from the Patient Demographic Service (PDS).
- If you work for an organisation that is not a GP Practice, worklists can be built manually by using Add to my organisation list action that is available on patient dashboard within section SHORTCUTS.
- Everyone in your organisation will see this list.
- Only patients that have active care plan are displayed. Those with deleted, withdrawn or never started before care plan are not included into worklist.



* Hint* For users working for two or more organisations, remember to select the relevant organisation when adding a patient to ensure they are on the correct organisation list.

Functionality Overview

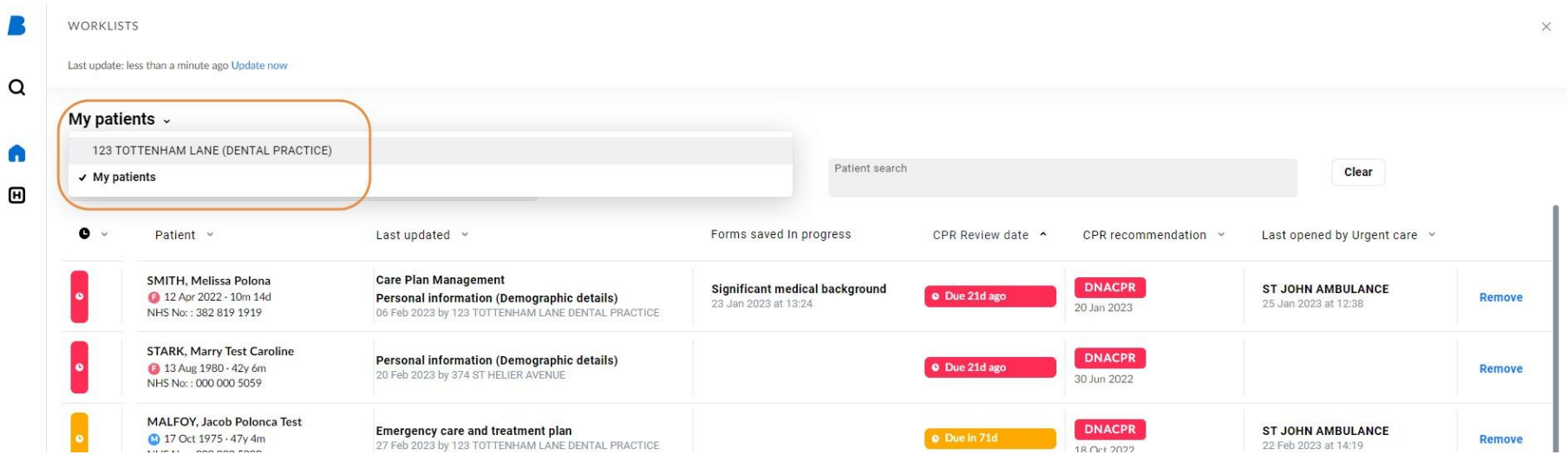
In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS South West London

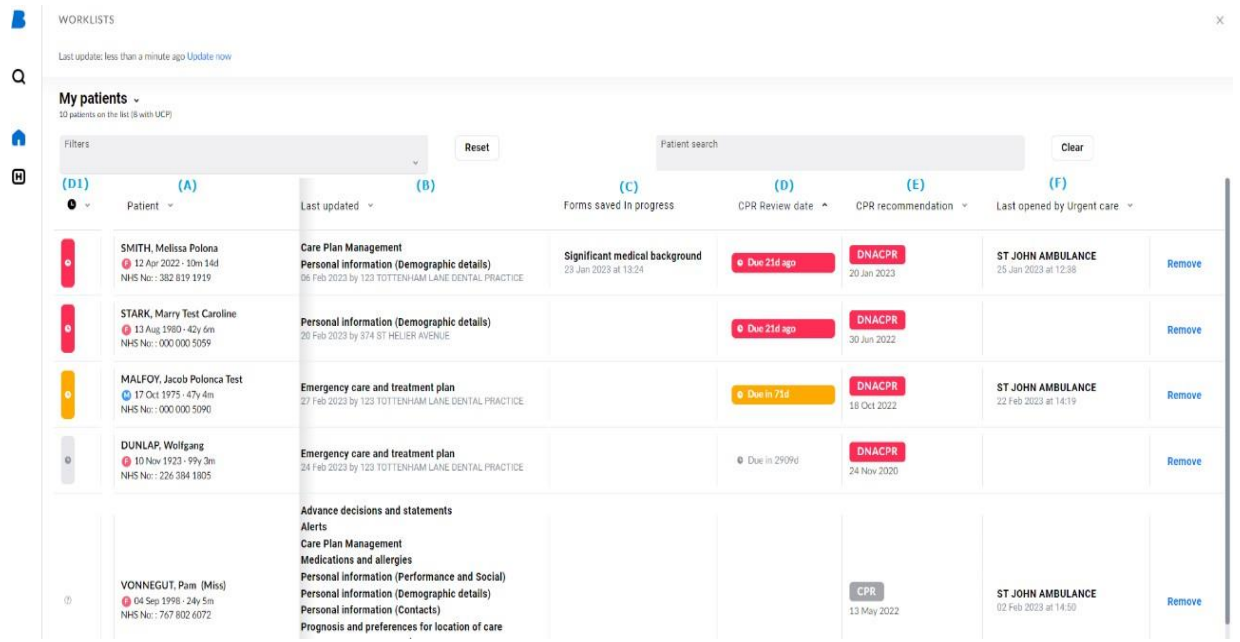
Worklist view selector

Dropdown list selector enables user **to switch between worklist views** – My patients or My organisation worklist view.



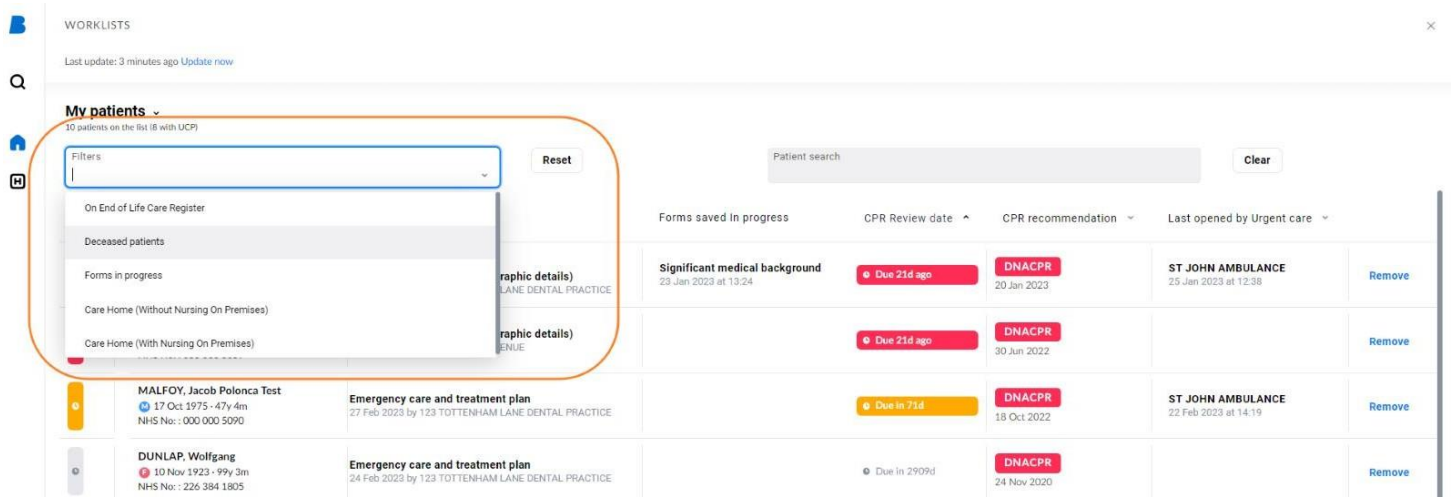
Worklist content

The works lists include information about: Patient demographics, Last updated, Forms saved in progress, CPR review date, CPR recommendation and last opened by urgent care.



Worklist views

You can filter worklists and narrow down list of patients by: On End of Life Care Register, Sections in progress, Care Home (Without Nursing On Premises), Care Home (With Nursing On Premises).



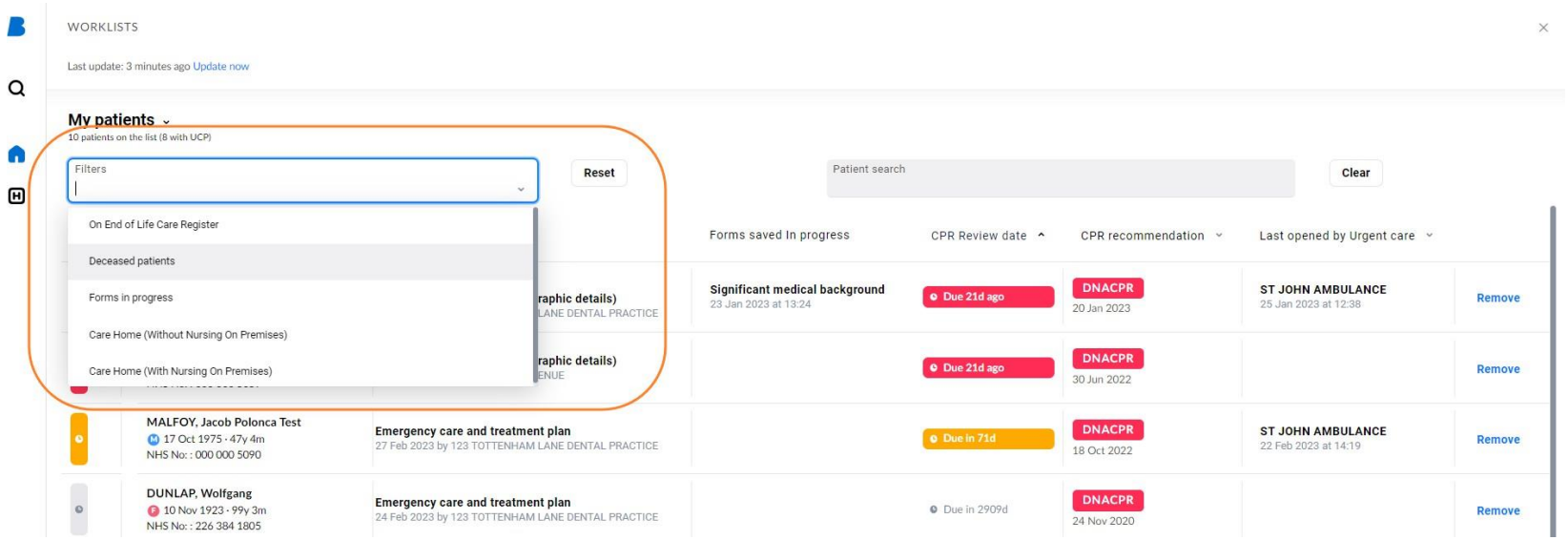
Filtering options

The user is able to narrow down list of patients by applying one or more filtering options:

- **On End of Life Care Register**: system will display all patients that are on End of life register, if it is recorded so in section *diagnoses and prognosis* in field 'Is the patient on the GP's Palliative / End of Life Care Register?'.
- **Sections in progress**: if this filtering option is applied, system filters out all patients whose care plans do not have any forms in progress.
- **Care Home (Without Nursing On Premises)**: system displays all patients that have this value set as Type of accommodation within form *Personal information*.
- **Care Home (With Nursing On Premises)**: system displays all patients that have this value set as 'Type of accommodation' within form *Personal information*.

Filtering options

Applied filters are **saved for next time** user returns to Worklists. The reset button next to the filters returns it to default view (show all on the list but hide deceased patients).

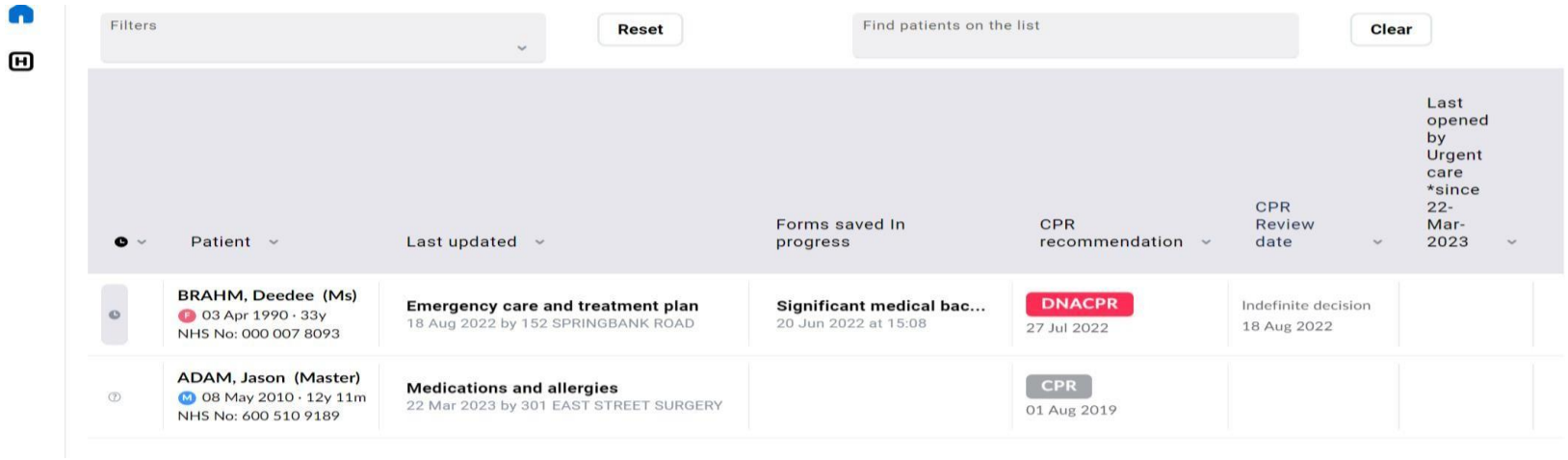


Patient Search

- The user is able to search for certain patients by entering **full NHS number** or by part of the **patient's name** (at least 3 characters) into search box above list of patients. The clear button next to the search box clears filled in search criteria.

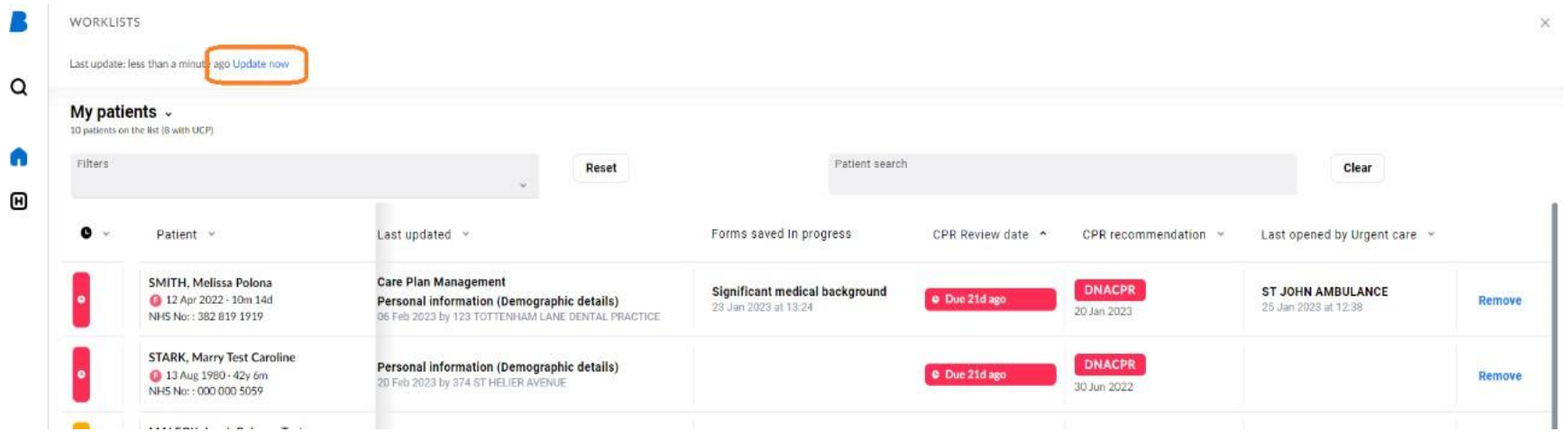
- Upon entering full NHS number of part of the patient's name, the list automatically narrows down to patients that match search criteria.

- If search doesn't return the desired result, please check whether the patient is included in the list or might be deceased, had his/her care plan withdrawn or deleted.



Update

- User can update worklist view by selecting Update now in left upper corner.
- User can see how long ago the worklist page was last updated.



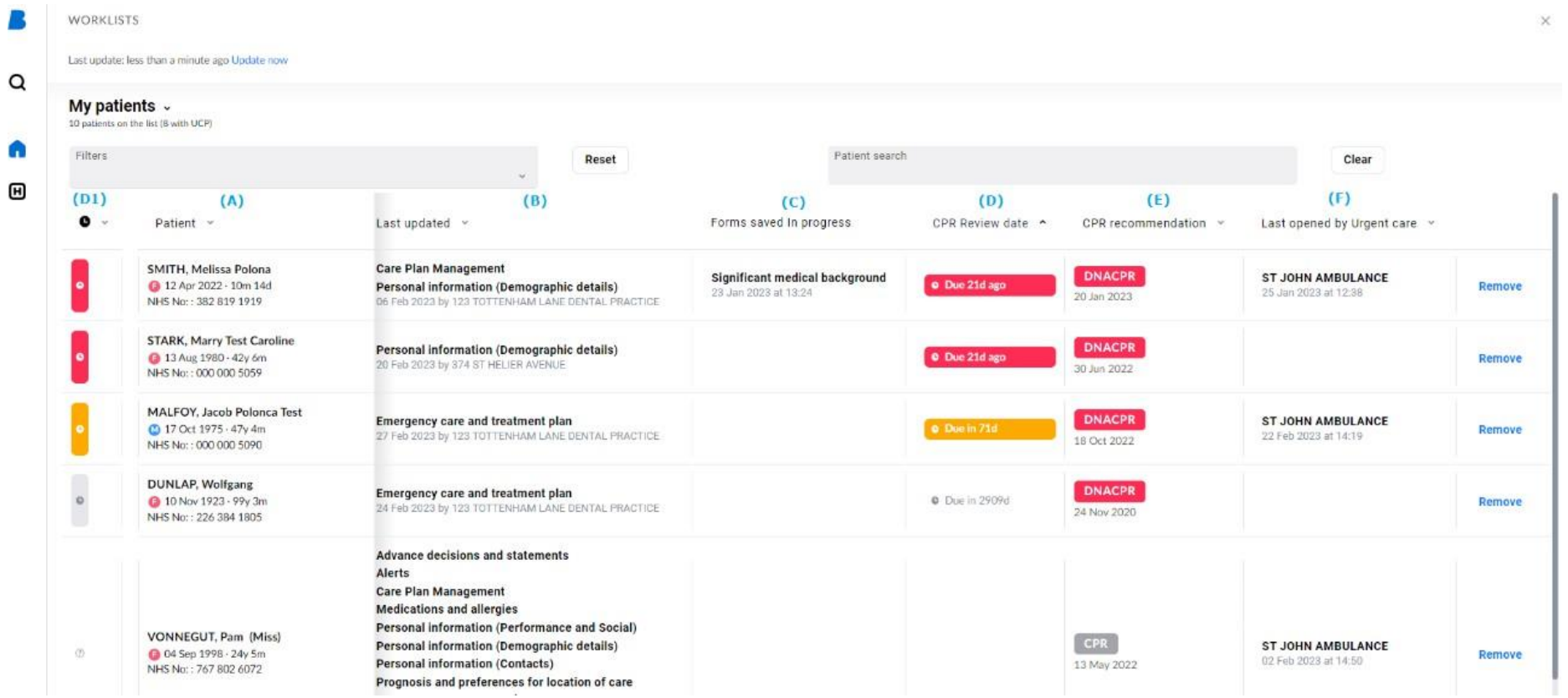
Content details by columns

In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS
South West London

Content details by columns



Content details by columns

Patient (A): basic patient’s demographic data. User can sort patients by Surname (A-Z and Z-A) by selecting arrow icon next to column tittle.

Last update (B): This column contains date when some or all sections were submitted (complete). In My patient worklist view, if patient doesn't have care plan yet user will see message that will reflect absence of the care plan. User can sort patients by last updated date (ascending, descending) by selecting arrow icon next to column tittle.

Forms saved In progress (C): This column displays forms (care plan sections) that are saved as in progress in patient's care plan. There is no sort option for this column.

Content details by columns

CPR Review date (D): This column displays information if Emergency Care and Treatment Plan needs to be reviewed or if review date is already past due. If review is not needed, indefinite decision text is displayed. **(D1)** Time icon in 1st column is a reflection of CPR Review date column. User can sort patients by Review date (ascending, descending) by selecting arrow icon next to column tittle.

Legend:

- Due date is greater (older) than current date, which means that review date is overdue - system will display **red** flag
- Due date is in 3 or less months from current date - system will display **amber** flag
- Due date is more than three months from current date in future - system will display **grey** text

Content details by columns

CPR recommendation (E): User sees what CPR recommendation was entered into patient's CPR and treatment escalation decision.

Legend:

- If 'Yes' was selected in the CPR and treatment escalation decision form, it's marked with **grey** flag with text **CPR**
- If option 'No' was selected in CPR and treatment escalation decision form, then it's marked with **red** flag with text **DNACPR**
- If option 'Decision Not Yet Made' was selected in CPR and treatment escalation decision form, user will see grey text **No decision**
- Regardless of selected option in the form CPR and treatment escalation decision, system will also display date which is taken from same form in field Date of CPR recommendation. User is able to sort by this date (ascending, descending) by selecting arrow icon next to column tittle

Content details by columns

Last opened by urgent care (F): This information will be presented to user if the patient's care plan was opened (viewed) by a urgent care user in past three months. Only last viewing urgent care organisation is displayed (not history of all views in past three months). User can sort patients by Last opened by urgent care date (ascending, descending) by selecting arrow icon next to column tittle.

Removing patients from Worklist

In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS South West London

Removing patients from Worklist

Removing patients from worklists is supported only for:

- My patients worklist
- Non-GP My organisation worklist

GP based worklist view has automised logic of adding and removing patients to the list therefore manual removal is not available to user.

Removing patients from Worklist by system

The system will automatically remove patients under certain circumstances:

- **Care plan is withdrawn**

The withdrawal action is performed by a user within the patient's care plan under the Actions menu in Settings. The system will remove patient from all worklists if their care plan is withdrawn.

- **Care plan is deleted**

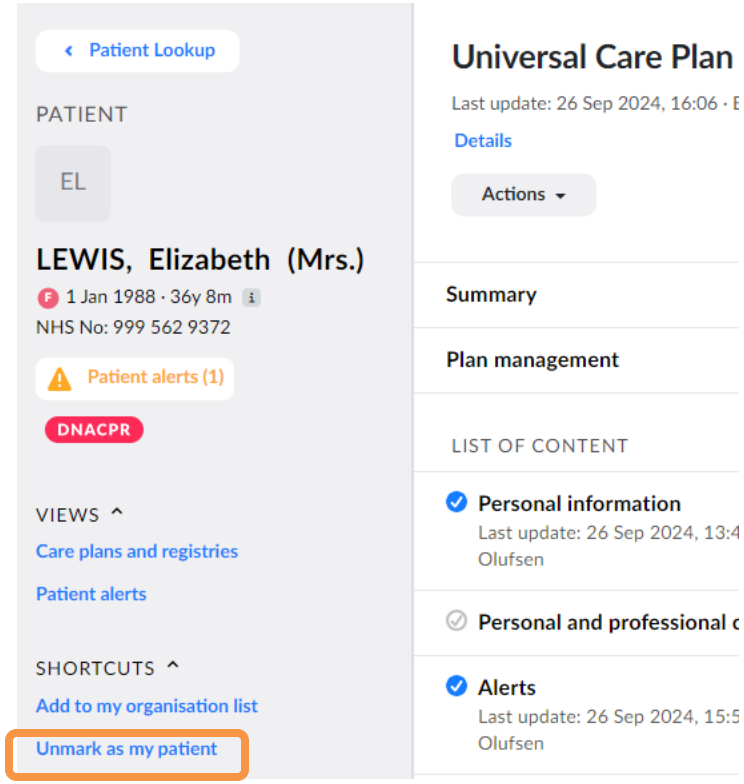
A patient's care plan can be deleted by users (with proper permission) within the care plan's Actions menu. The system will remove patients from all worklists if their care plan is deleted.

- **Upon PDS sync, patient is not under GP anymore**

The PDS sync is triggered every time the user opens a patient's care plan. The GP Worklist will be built based on data from last performed PDS sync on a patient's care plan. If the system doesn't detect a certain patient registered within a user's GP anymore, such patient won't be included in the GP worklist and won't appear on it.

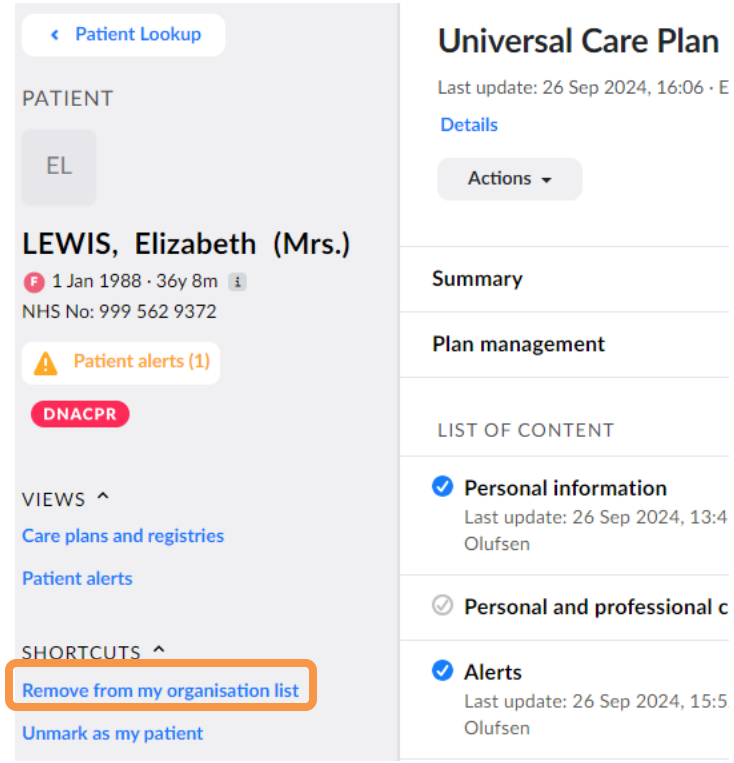
Removing patients from worklist

You can remove patient from your worklist by Unmark as my patient action available on patient dashboard within section SHORTCUTS.



Removing patients from worklist

For non-GP organisations, you can remove patient from My organisation worklist by Remove from my organisation list available on patient dashboard within section SHORTCUTS.

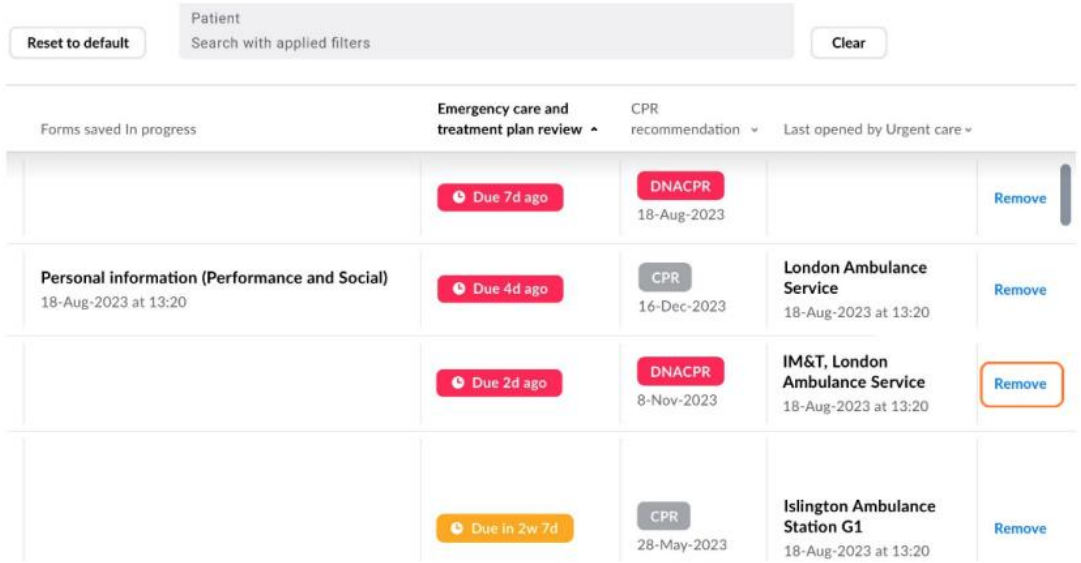


Removing patients from worklist

User is able to remove patient from worklists by action available on patient care plan, or with remove action, positioned in last column for each individual patient.

Once remove action is selected, dialog box appears, and user must select remove button to confirm action.

Patient is only removed from worklist on which user is performing removal action



* Tip* Before moving organisation, remember to add patients to the Organisation's worklist and removed them from your personal list.

Frequently asked questions

In partnership with OneLondon
Hosted by NHS South West London

ONE LONDON

NHS South West London

1. Why can’t I access Worklists?

- To be able to access the Worklists you must be logged into the UCP web portal and have an appropriate user role.

See details in the slide titled **Accessing the worklist views**.

2. There are no patients in My patients worklist view

- If no patients were manually added to the list via the Mark as my patient action, the list will be empty.
- If there are patients that are marked as My patient but do not appear in the My patient worklist view, check if patient is deceased or if their care plan was withdrawn or deleted.

See details in slide titled **My patients worklist** for ‘Mark as my patient’ feature.

3. There are no patients in My organisation worklist view for non-GP organisation

- If no patients were manually added to the list by the Add to my organisation list action, the list is empty.
- If there are patients that are marked as Add to my organisation list but do not appear in the My organisation worklist view, check if patient is deceased or if their care plan was withdrawn or deleted.

See details in slide titled **My Organisation list.**

4. There are no patients in My organisation worklist view for a GP organisation

- If system doesn't find any patients that are registered within a user's GP, the GP Worklist is empty.
- In this case, the user is advised to search for a patient and open their care plan in order to trigger a PDS sync.
- If PDS sync was performed but the patient still doesn’t appear to be in My organisation worklist, check if the patient is deceased or if their care plan was withdrawn or deleted.

5. Why can’t I see the add and/or remove action in worklists?

- Only users with clinical and non-clinical roles can access Worklists and therefore have access to the related actions. Urgent care users will not see the worklist functionality.
- Another reason might be that you’re currently logged in as a user working under a GP organisation.
- The Add to my organisation list and Remove from my organisation list action is not available for GP organisations.

6. How can I see deceased patients?

- Deceased patients will not show on the Worklist feature.

Service Support

For any queries or more information please follow the link below:

Contact – Universal Care Plan (onelondon.online) .