Point-of-Care

User Guide

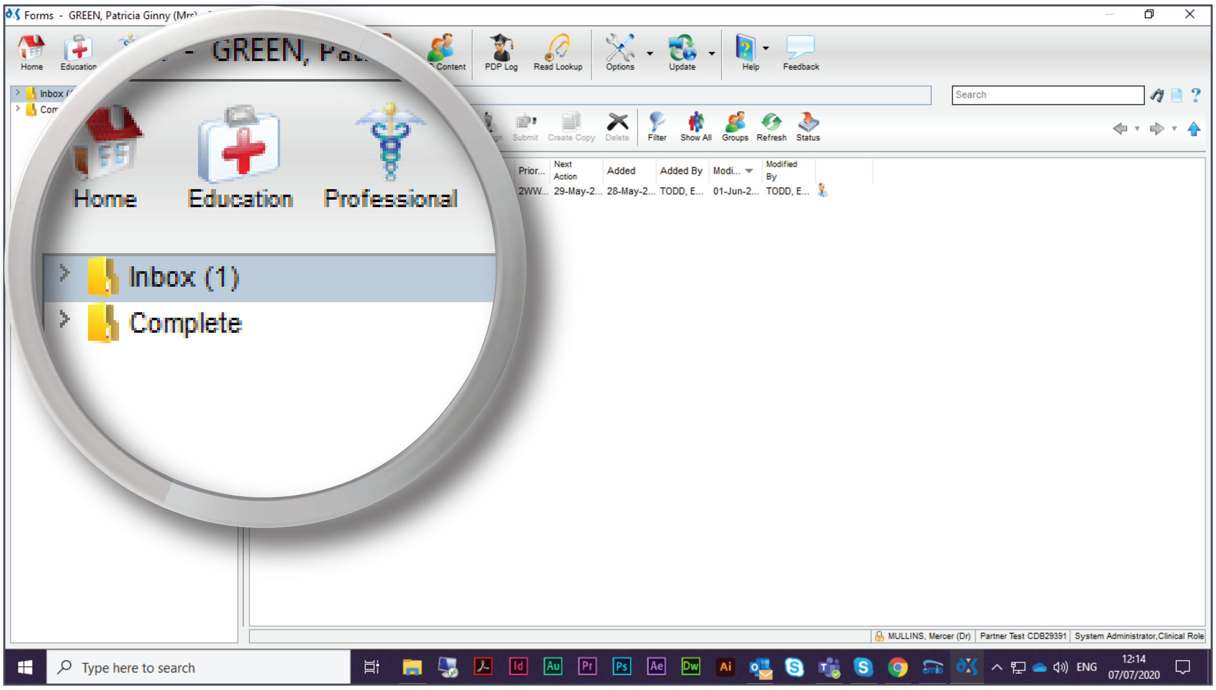
How to Use the Forms Section

Introduction

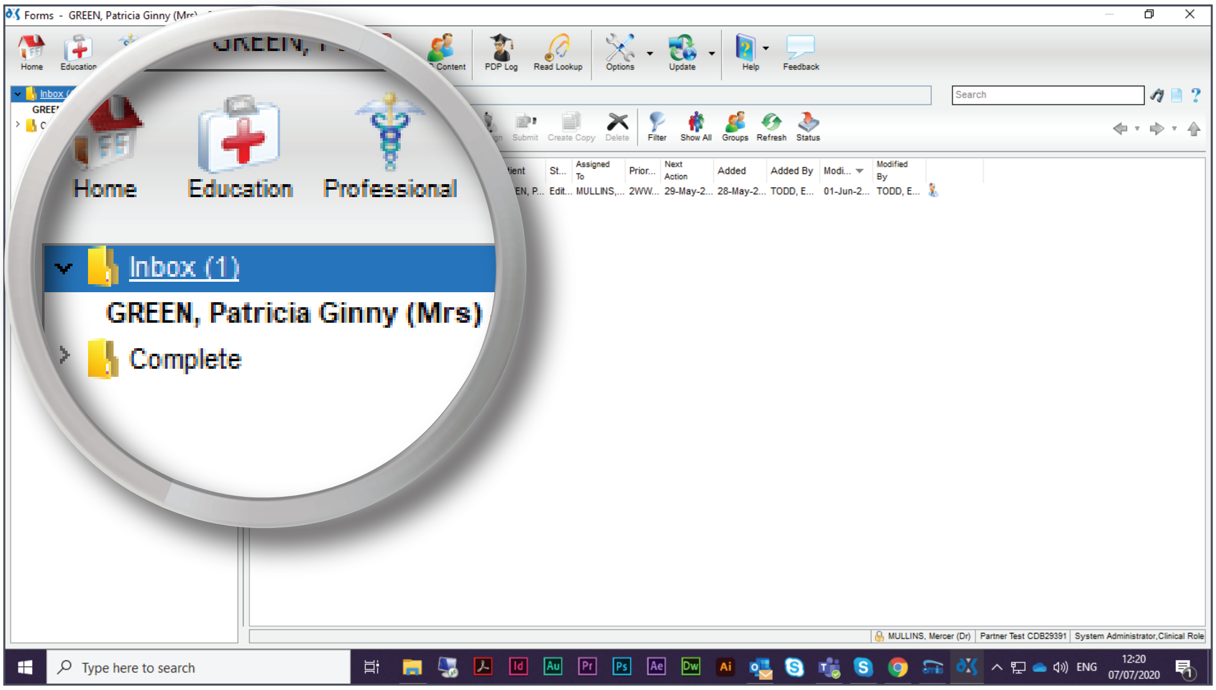
The ‘Forms’ section contains all draft and completed referral forms. This guide will show you how to use the ‘Forms’ section.

Instructions

1. Referral forms are categorised into folders based on their status.



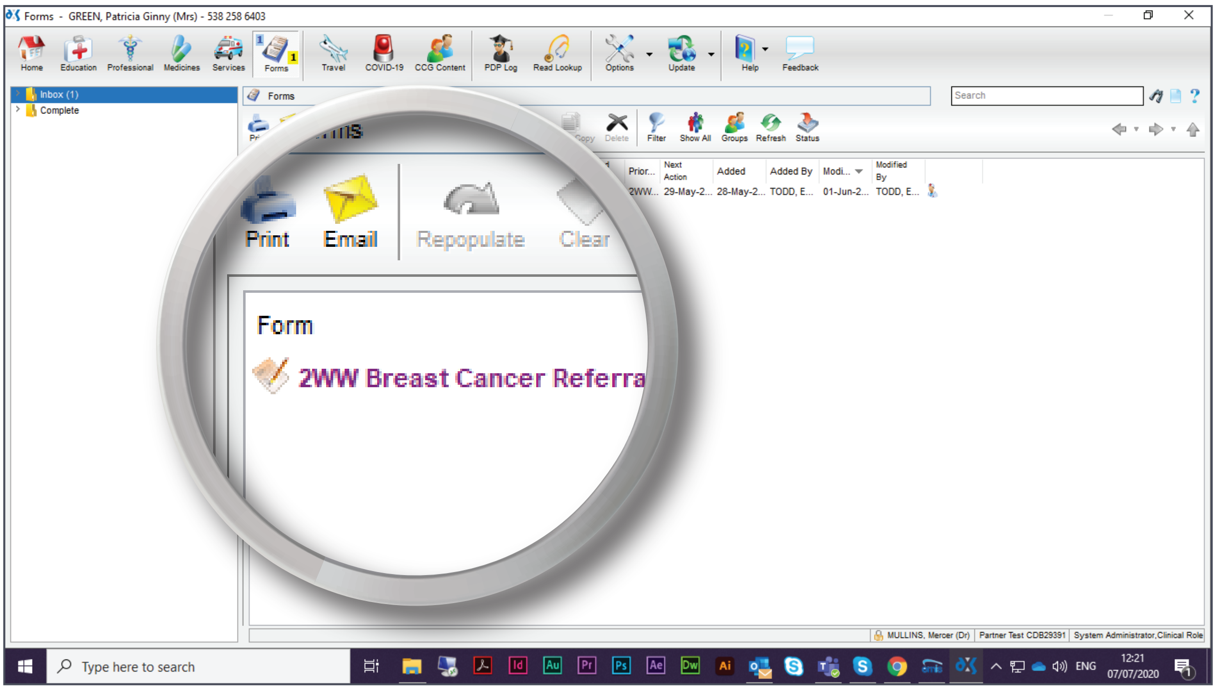
2. All forms that require your attention are located in the ‘Inbox’ folder.
3. This includes your draft forms and forms assigned to you by other users.



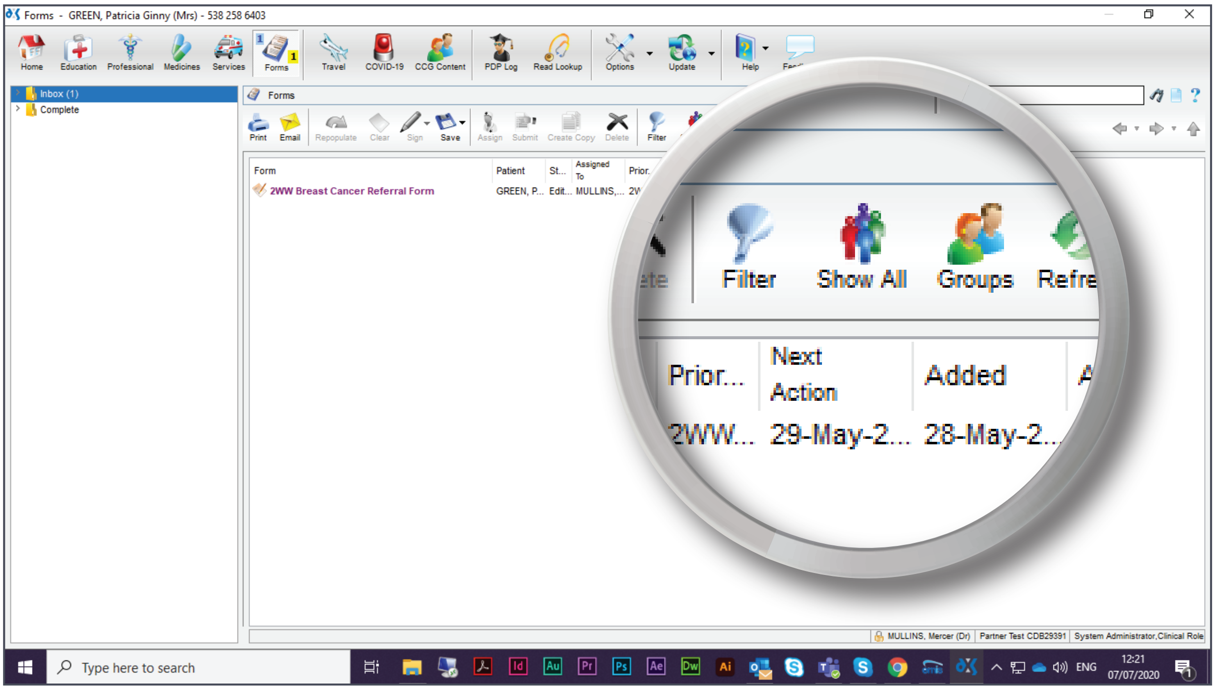
4. The small number located in the top left corner of the ‘Forms’ button indicates the number of forms in the ‘Inbox’.

5. The small number, highlighted in yellow, located in the bottom right corner of the 'Forms' button indicates the number of forms that has been assigned to you.

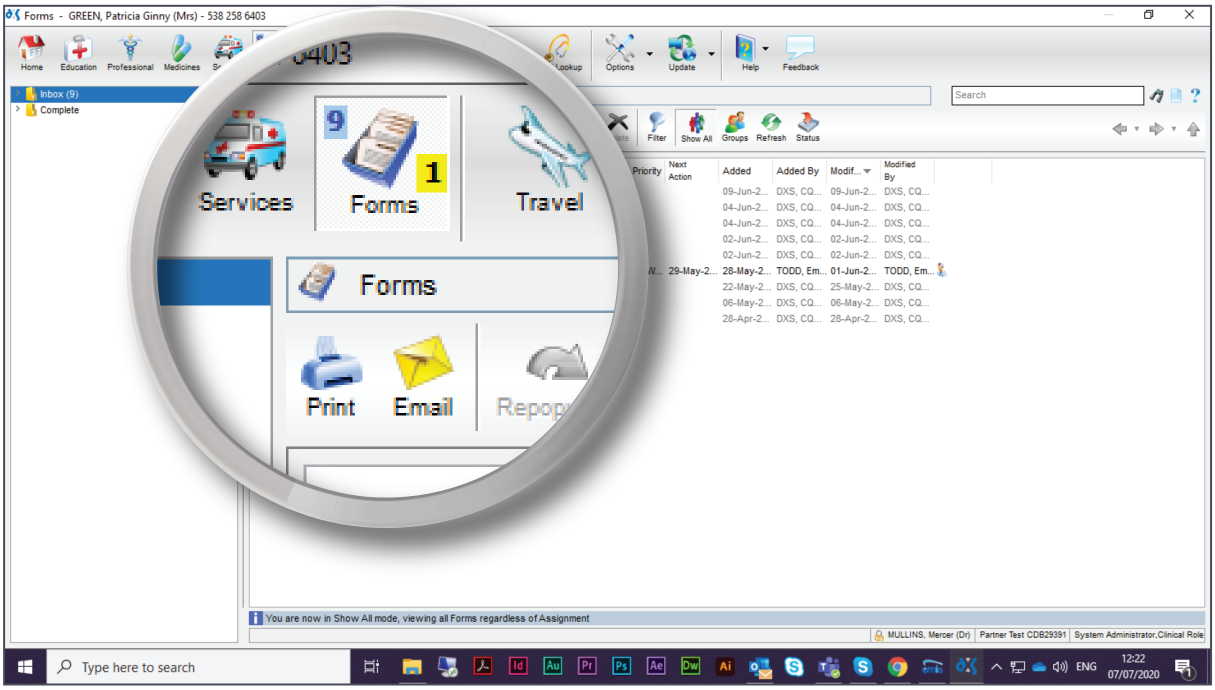
6. The forms relevant to the current patient record, will be displayed in bold.



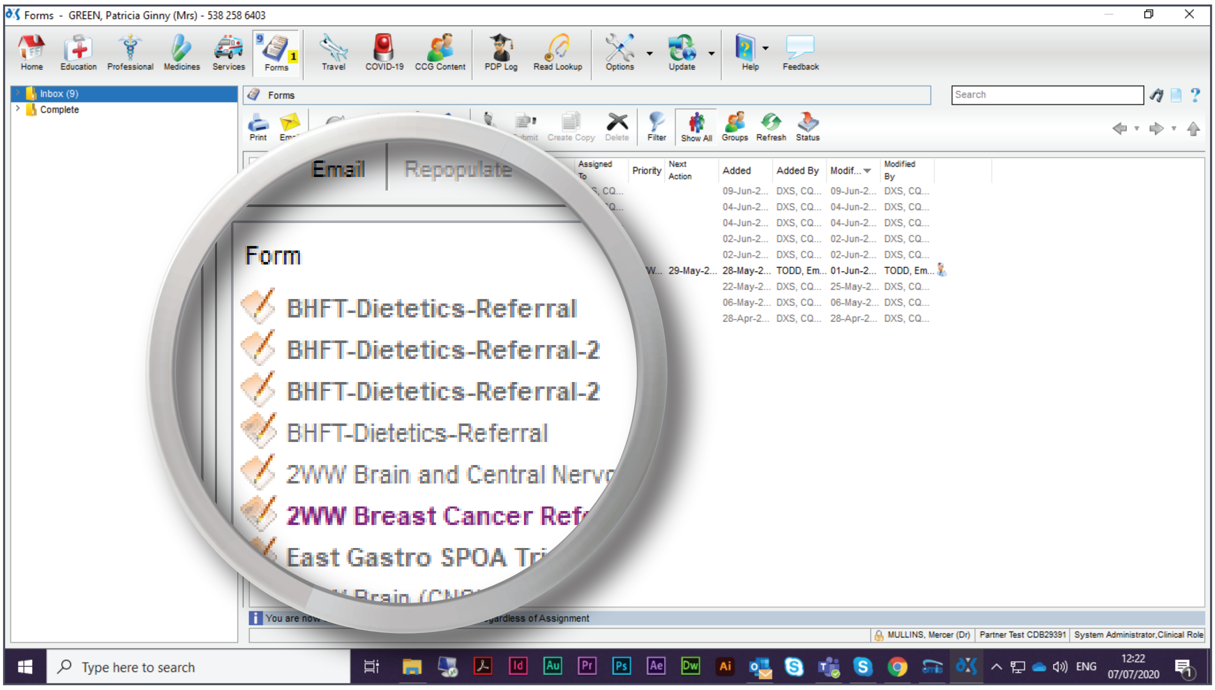
7. To view all referral forms, including forms assigned to other users, select 'Show All'.



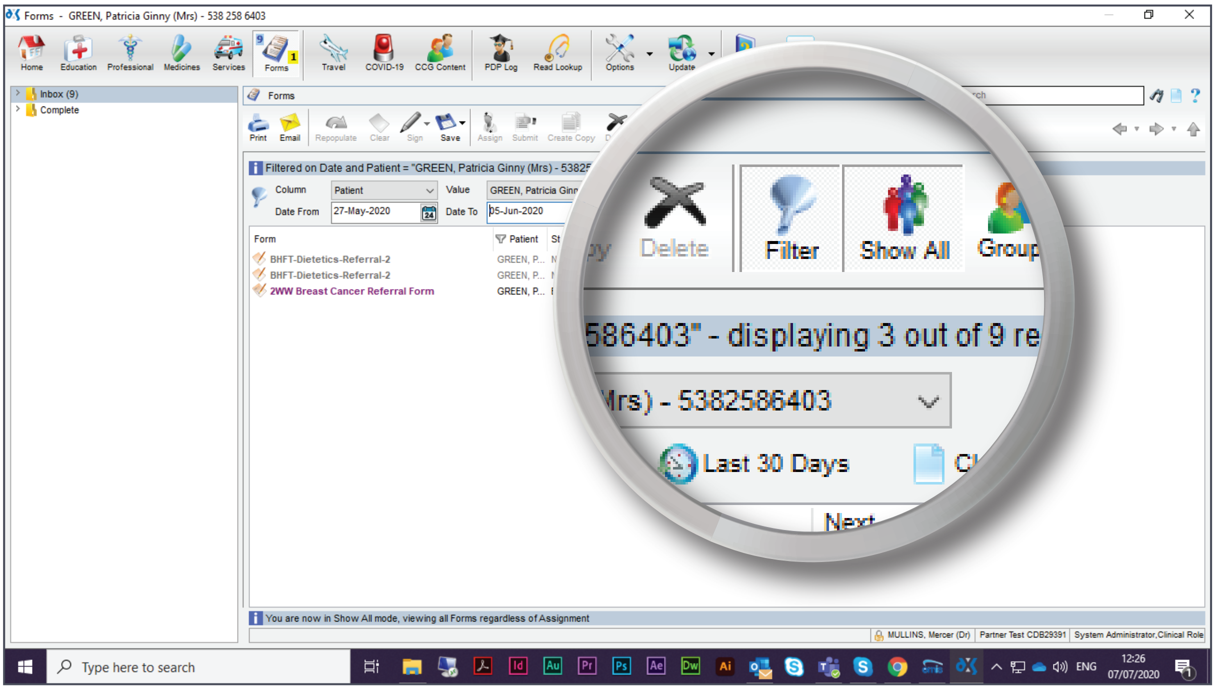
8. When 'Show All' has been selected, the number of forms in the 'Inbox' will change.



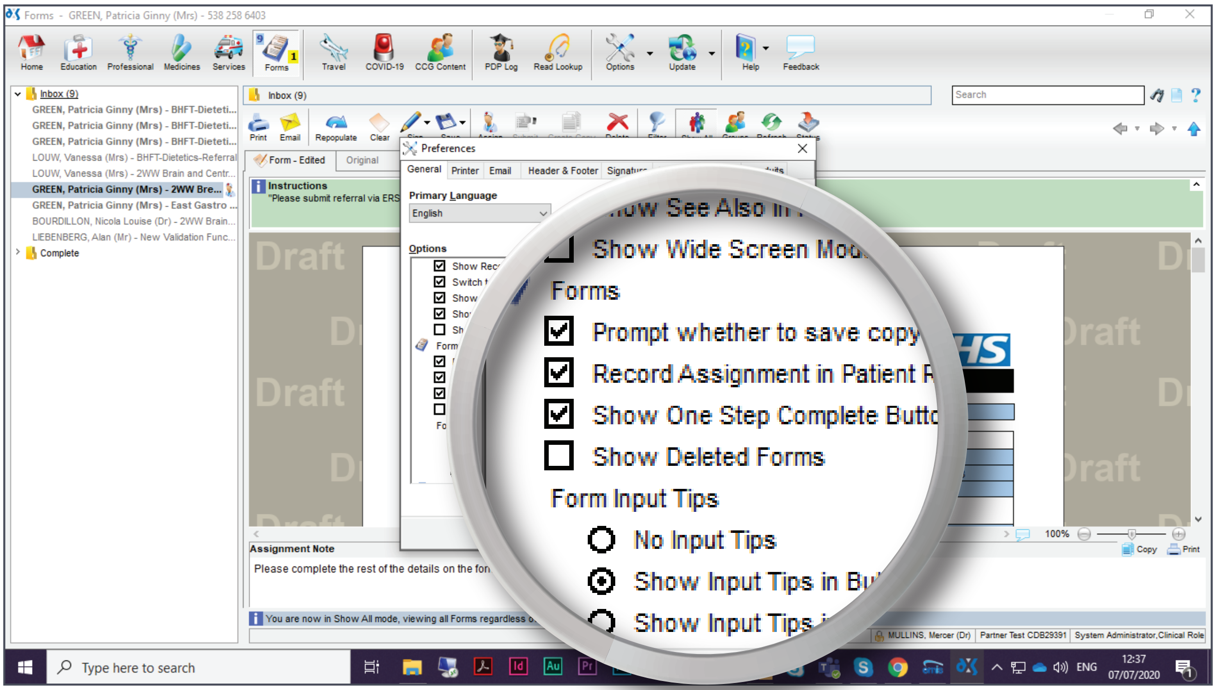
9. Referral forms that have been assigned to other users will be greyed out.



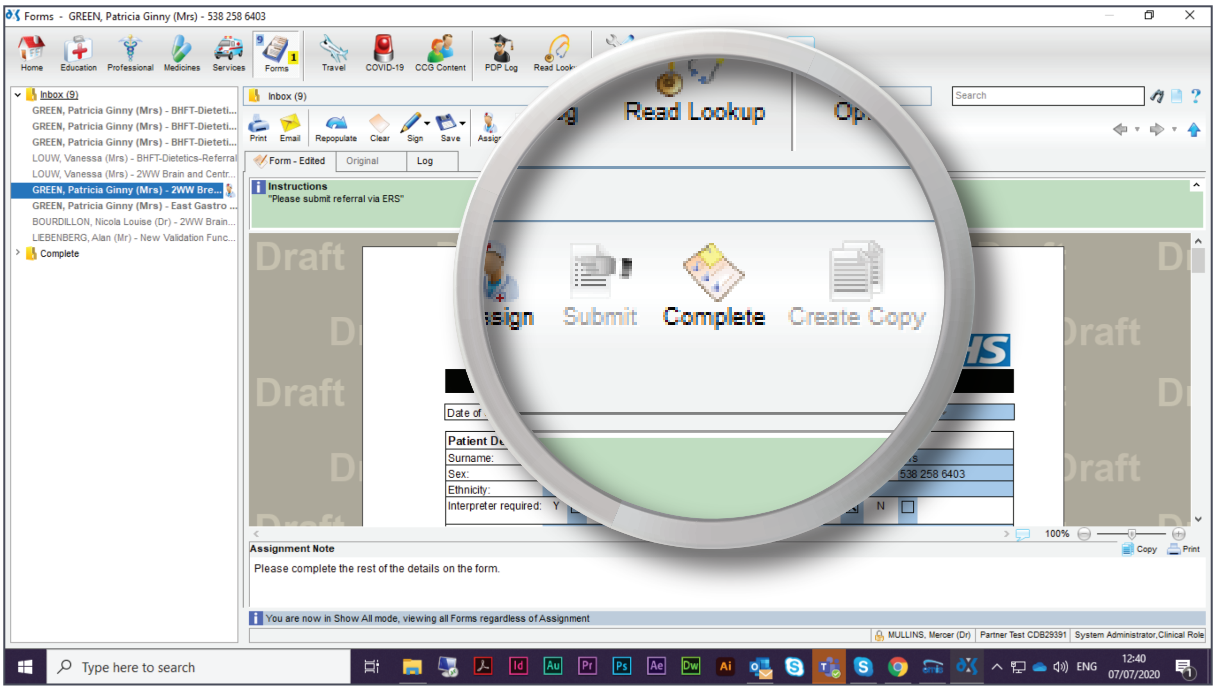
10. For more information on how to assign a referral form, read the ‘How to Assign a Referral Form’ user guide.
11. Referral forms can be filtered according to column and filter value, as well as according to a specific date range.
12. Click on the ‘Filter’ button and set the relevant parameters.



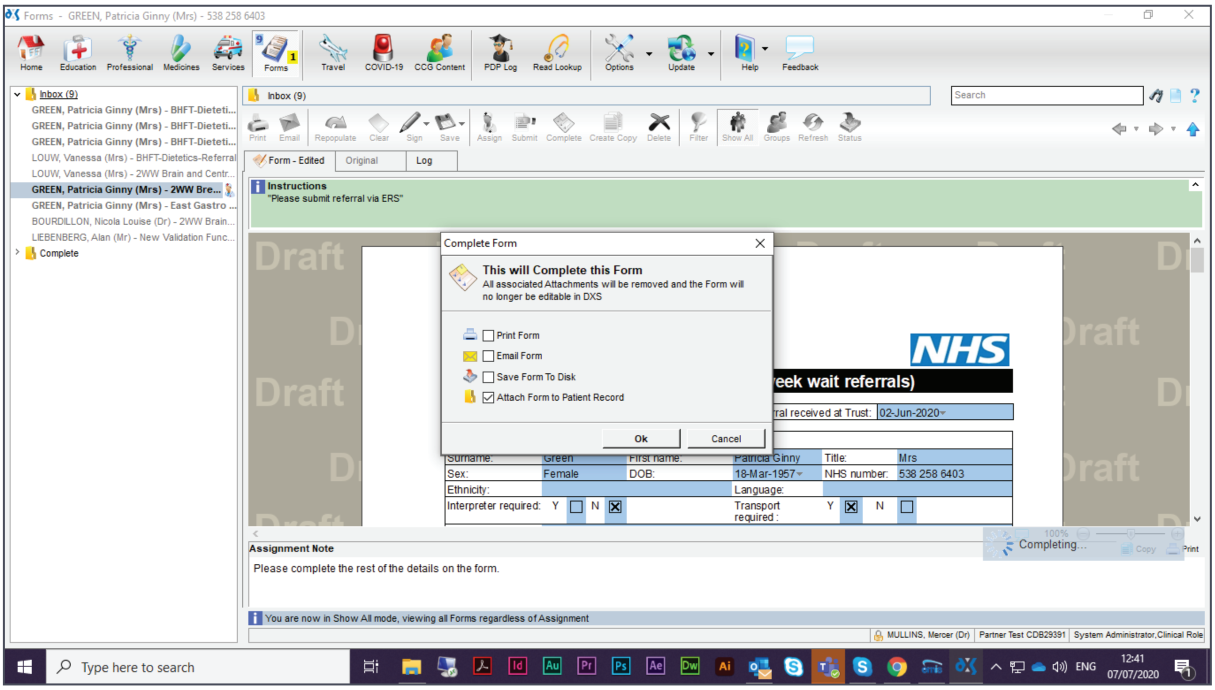
13. You can complete a draft referral form from within the ‘Forms’ section by clicking on the ‘Complete’ button.
14. The ‘Complete’ button does not show by default.
15. Click on the ‘Options’ button in the main toolbar and ensure that the ‘Show One Step Complete Button’ option has been selected.



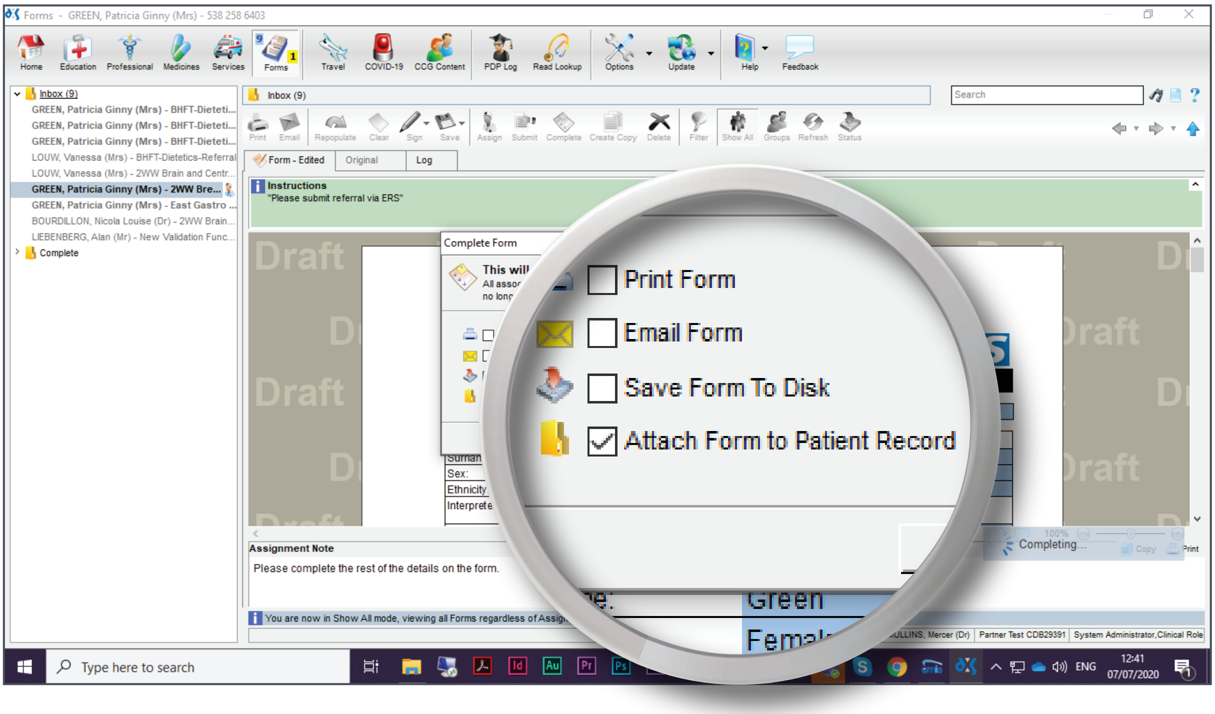
16. Click ‘Ok’ to save the settings.
17. The ‘Complete’ button will now be visible. Click on the ‘Complete’ button to complete the form.



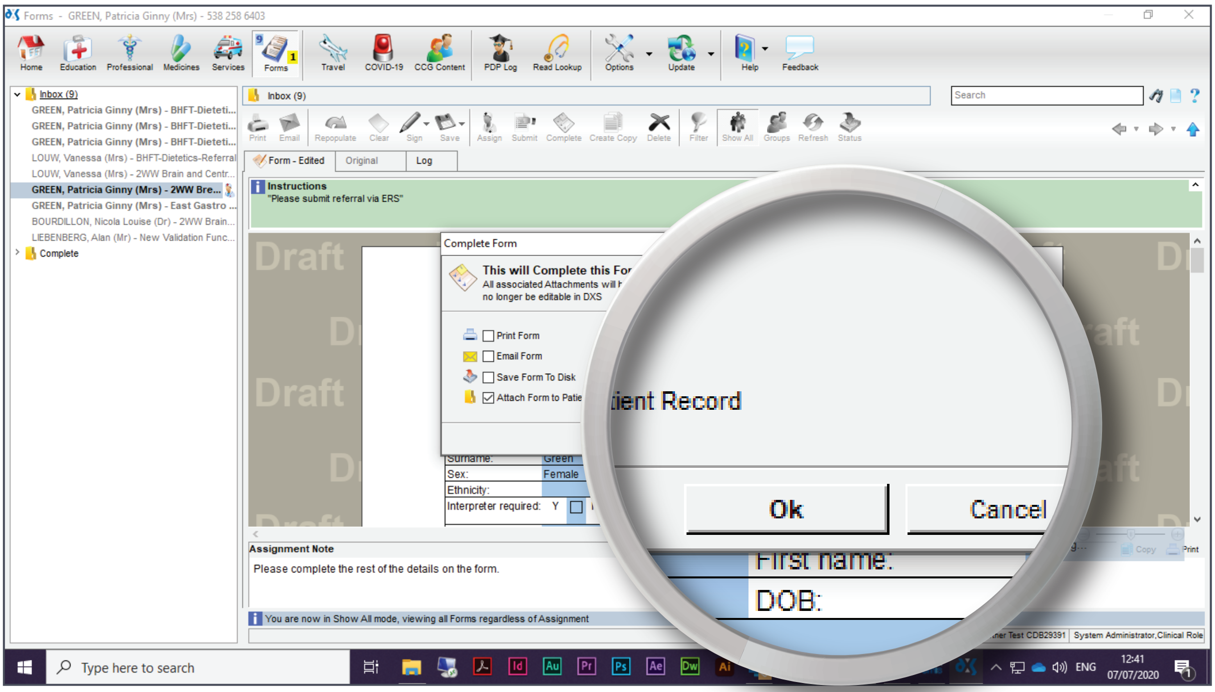
18. A prompt box will appear, listing various options.
19. The completed form can be printed, emailed, saved to disk or attached to the patient's record.



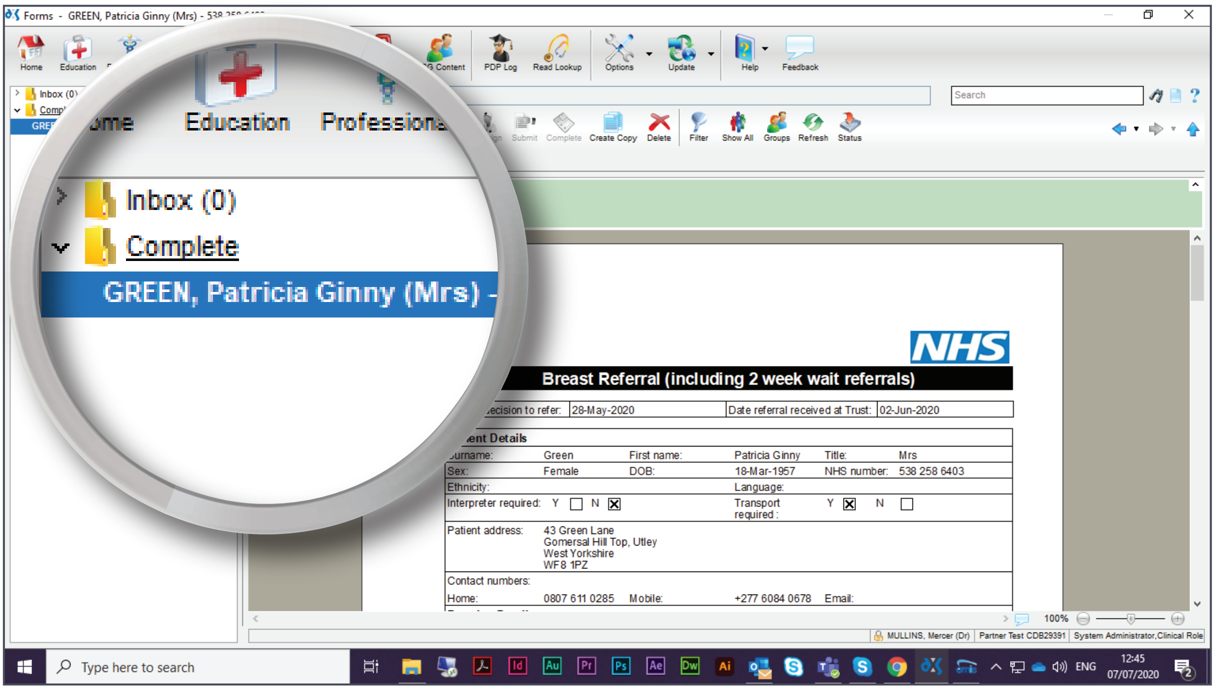
20. The 'Attach Form to Patient Record' option will be selected by default.



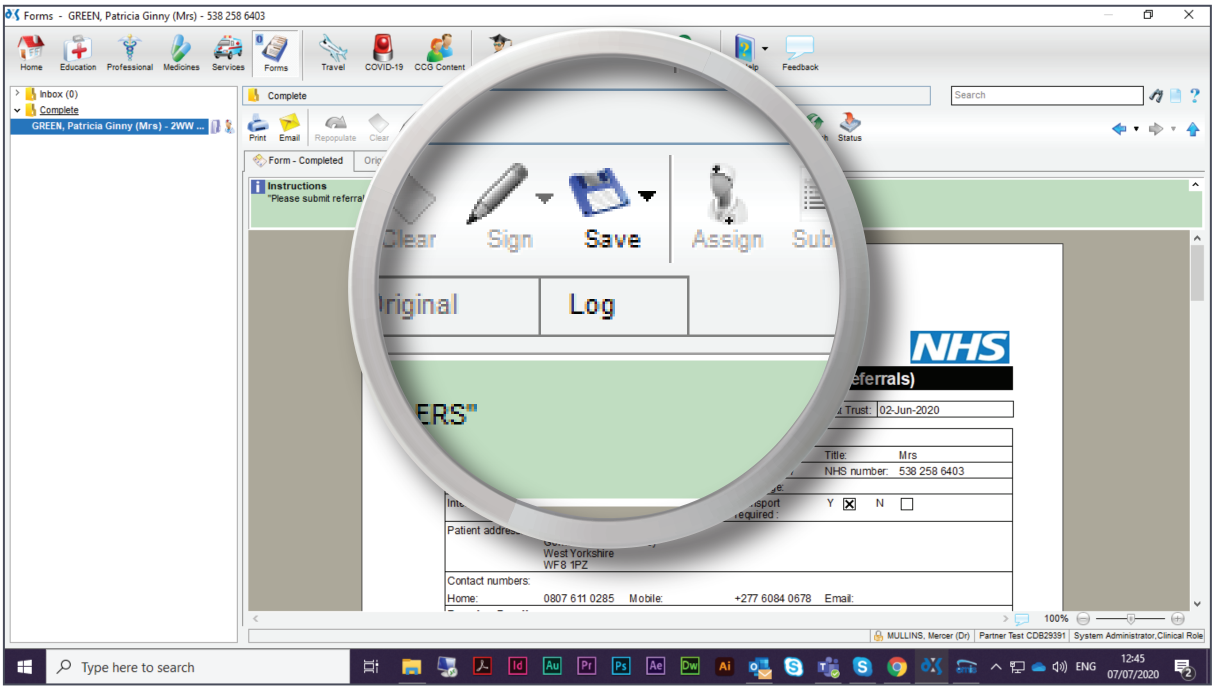
21. Click ‘Ok’ to proceed.



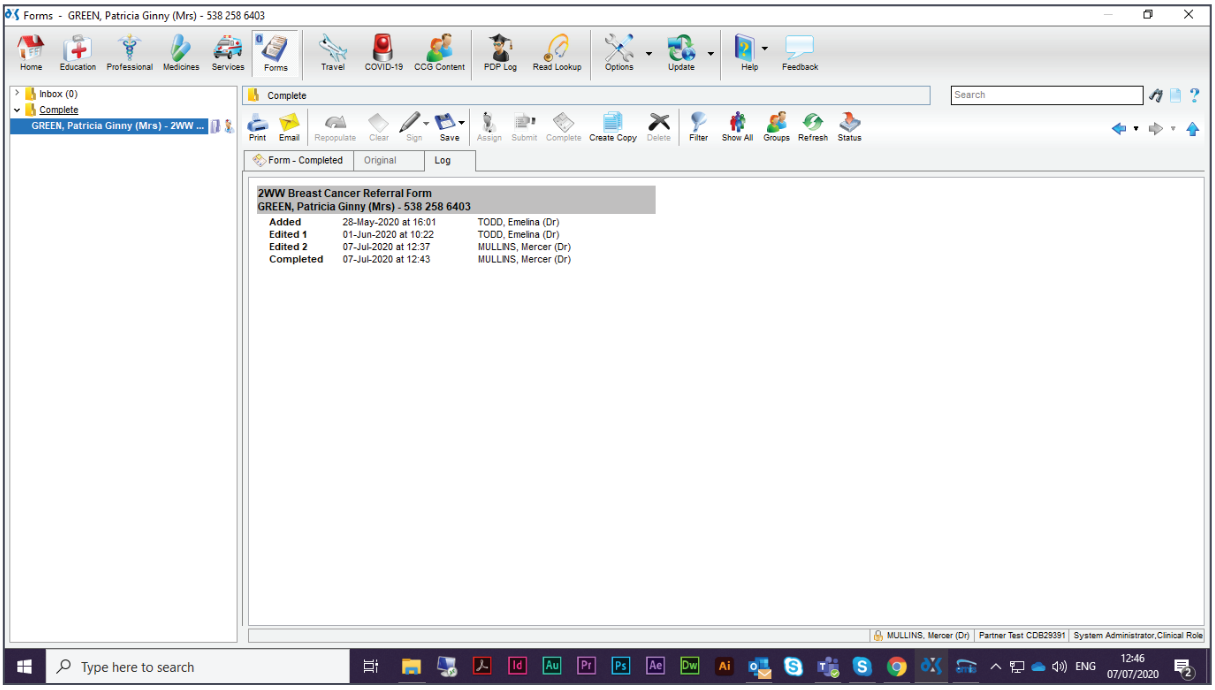
22. Forms that have been completed are located in the ‘Complete’ folder.



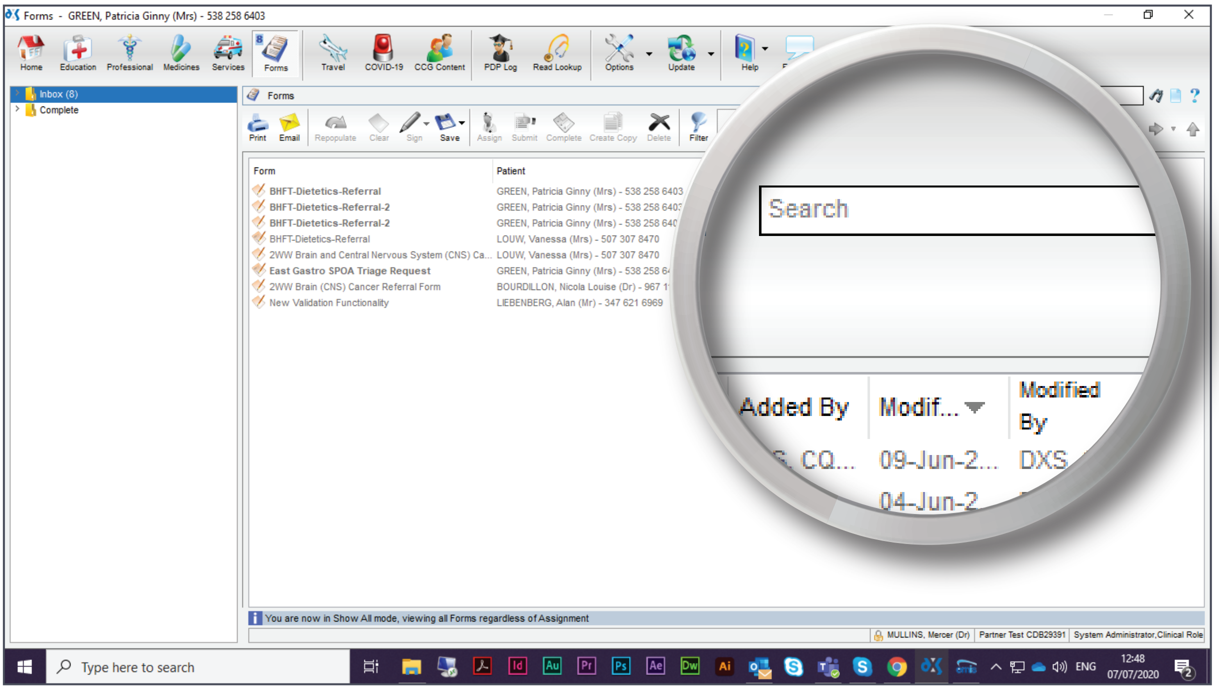
23. An audit trail of the edits performed on a form can be found under the ‘Log’ tab on the document.



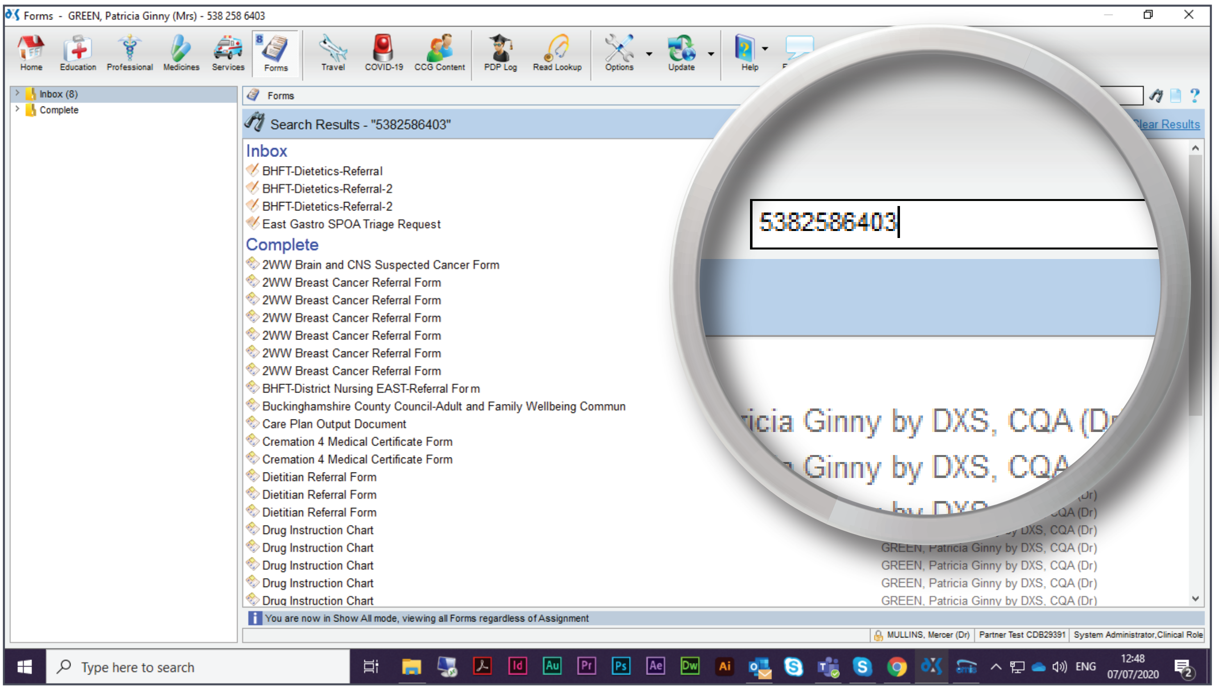
24. Specific information regarding the referral form’s history will be visible, such as by whom and when a referral was initiated, edited, and completed.



25. You can search for drafts and completed referral forms by using the search bar.



26. The search bar allows you to search for referral forms based on the patient's first or last name, NHS number, the title of the form, or by the name of the user who added the form.



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