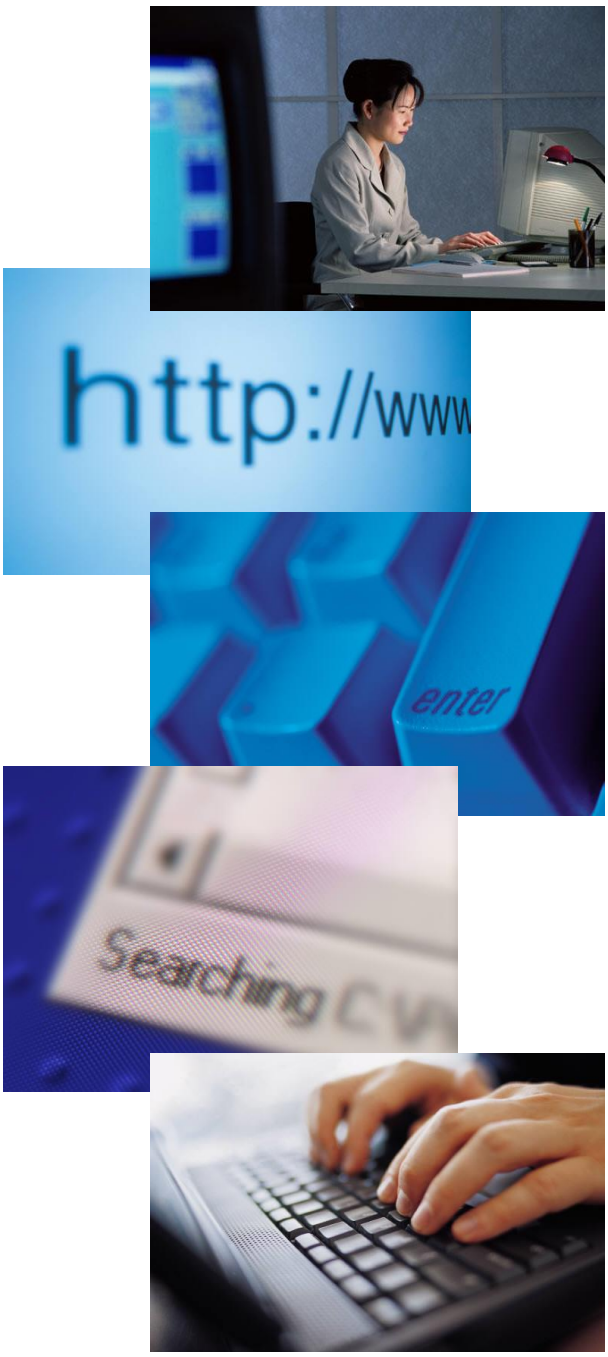
HSC Business Services Organisation



Clinical Communications Gateway

Dental Practice User Guide

March 2019

Contents

1. Introduction

The Clinical Communications Gateway (CCG) is the national product in HSC for the electronic exchange of clinical information *i.e.* referral letters between Primary and Secondary Care.

You can use CCG to send and receive referrals, and you can monitor the progress of referrals once they have arrived at the hospital.

Who is this guide for?

This guide can be used as a reference tool by anyone who uses CCG in the workplace to create referrals or manage worklists. It can also be used as a resource by anyone responsible for delivering training on CCG.

Areas covered

This User Guide will provide information on the following areas:

Accessing CCG

- Generating and Sending Messages
- Managing the Message Work lists
- Other CCG functions

Getting help

Problems and enquiries regarding CCG Accounts (i.e. password resets) should be directed to BSO Service Desk where the service request will be passed to the appropriate team:

Contact us:

Centre House
79 Chichester Street
Belfast
BT1 4JE

Telephone: 028 9536 2400

Email: Supportteam@hscni.net

?? Add New Account Request Procedure
?? Add software issues contact details? i.e eBusiness@hsnci.net

2. Accessing CCG

Access to CCG is controlled by the use of User Names and Passwords. These are normally issued and maintained by Business Services Organisation staff, and any queries regarding user names and passwords should be directed there in the first instance.

This section covers:

- Accessing CCG
- Passwords & Security
- The CCG Homepage
- Changing Passwords
- More about password security in CCG

Accessing CCG

Practice CCG Access

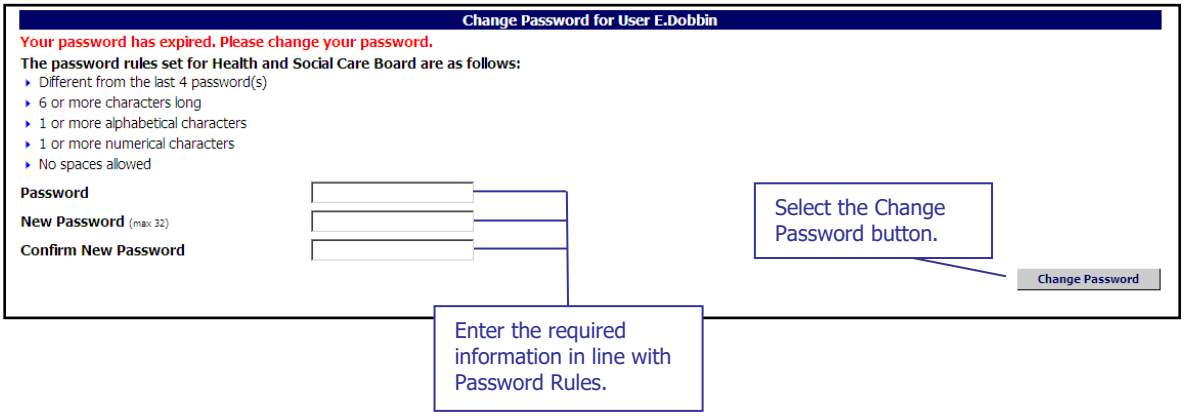
You will access the CCG trough the Business Services Organisation (BSO) Family Practitioners Services web portal. This portal is also used for access to the Dental Claims System and HSCNI email. Only practices which have agreed to use the DCS and/or have requested access to CCG and/or HSCNI email will be able to access the portal. There are minimum IT specifications/ requirements to enable access to the portal and a practice must agree to fulfil these prior to accessing the portal.

Passwords & Security

When you log onto CCG you are establishing a connection over the NHSNet, therefore you will need a CCG user name and password for security purposes. In the first instance you will be given these by a member of Business Services Organisation – you will be able to change your password at any time after this.

Logging on to CCG for the first time

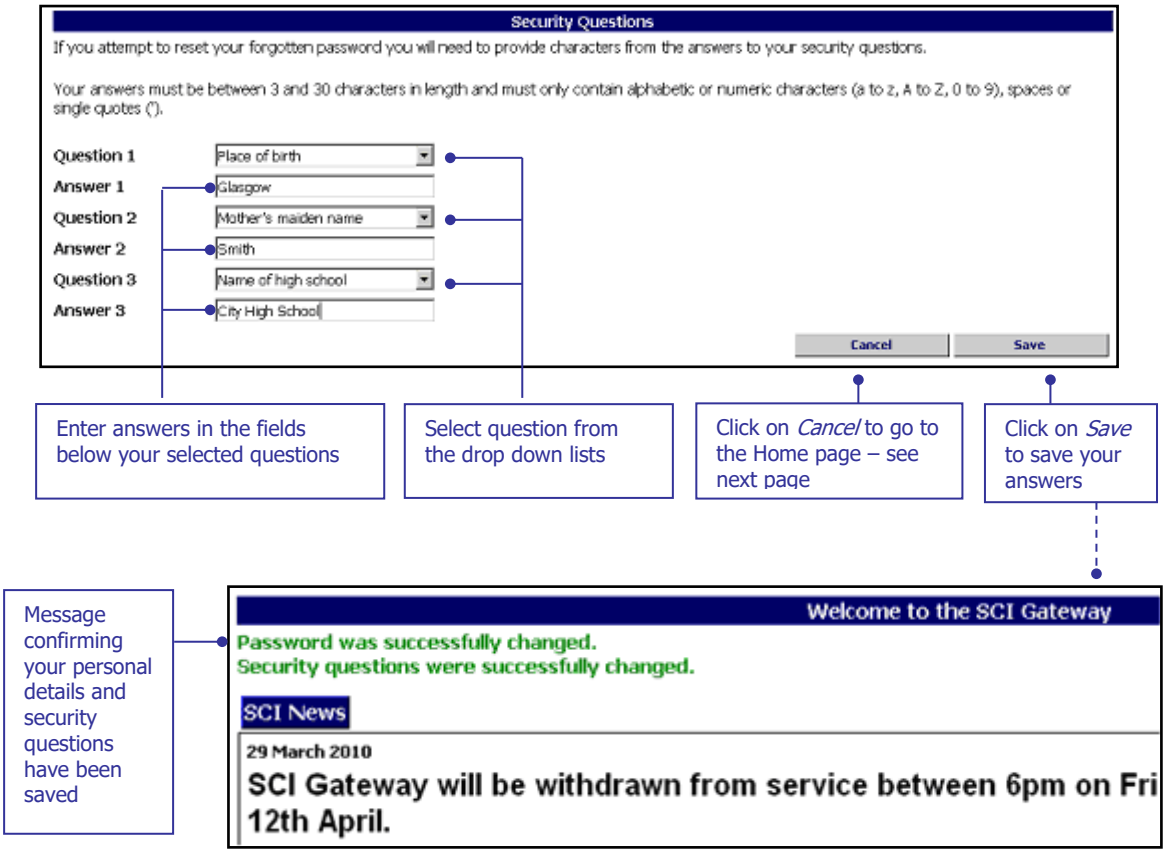
When you log on to CCG for the first time you will be asked to change your password for security purposes and you may be required to add your demographic information:



Security Questions

Pictured below is the Security Questions window which is displayed when you log on to CCG for the first time. You are required to select three security questions and your answers from the lists provided.

The answers you provide will be stored and used as security change questions which will allow you to reset your password if you should forget it in future. It will no longer be necessary for you to contact your local administrator to reset your password.



Your security questions and answers have now been saved to your login account.

You can create your own security questions by typing your preferred question in the relevant fields.

Security Question Options:

There are 10 security question options. You must select an option that is relevant to you from the list for each of the three questions. The options are:

- Colour of eyes
- Father's given name
- Favourite colour

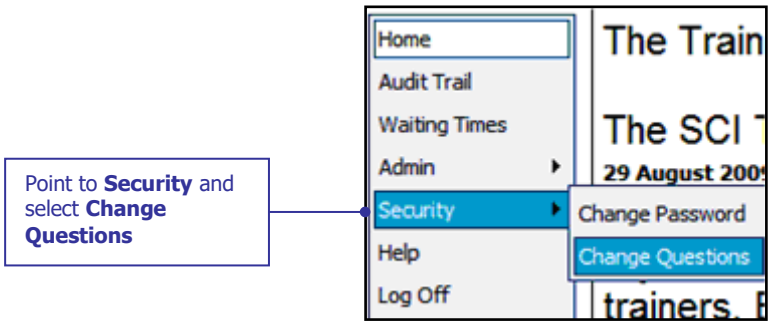
- Favourite country
- First pet's name
- Mother's maiden name
- Name of first school
- Name of high school
- Place of birth
- Town/suburb of birth

Security Questions Answer Rules

- Answers must be between 3 and 30 characters
- Must contain only alphabetic or numeric characters, spaces or single quotes

You can bypass the security questions if you select Cancel as described on the previous page and you will be returned to the Home page. Each time you log onto CCG the Security Questions window will be displayed until you add them to your account.

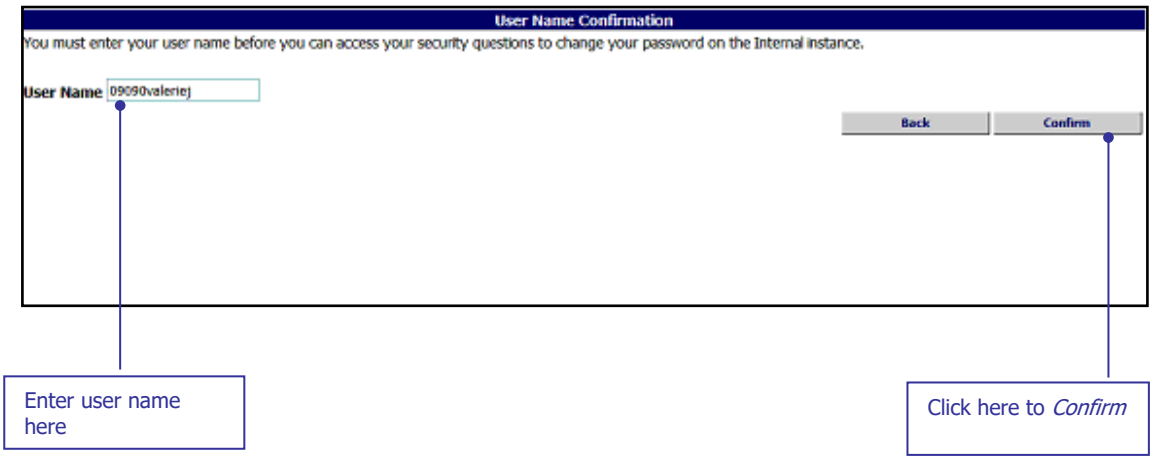
You can change your security answers and/or questions by pointing to Security and selecting Change Questions from the Menu Bar as pictured below:



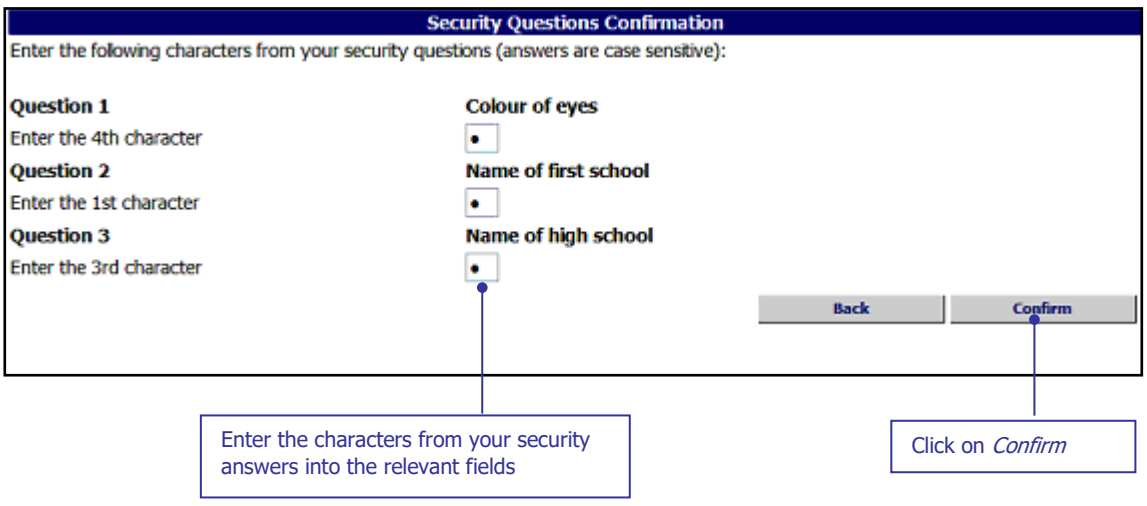
User Reset Password

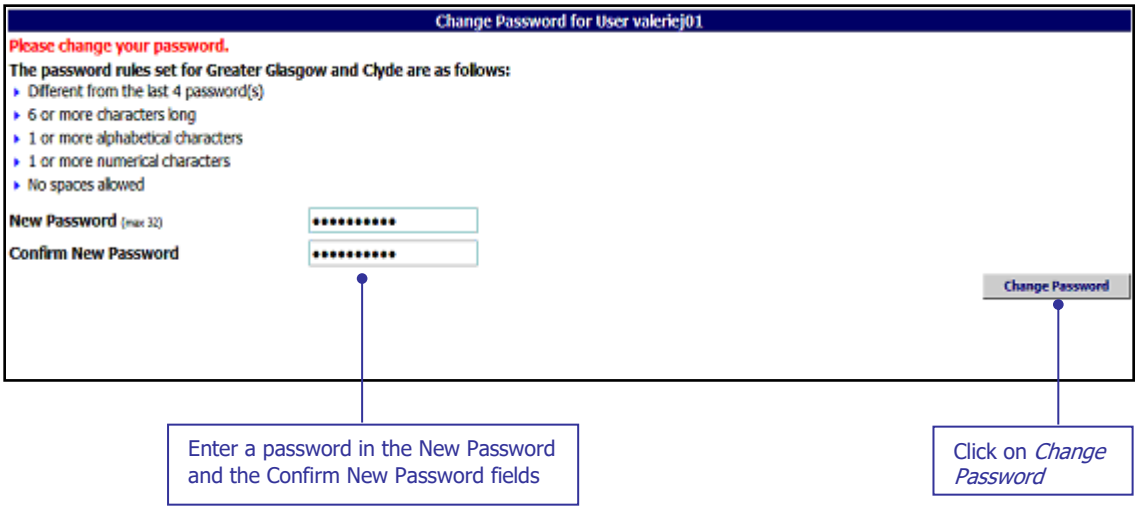
If after a period of inactivity on CCG a user forgets their password, previously they would have had to call their local administrator to have it reset. Users will now be able to reset their own password at the login page if they have set their own security questions. See relevant pages for information on how to add security questions.

Access CCG in your usual way either from the desktop icon or through your other IT system until you have the login window displayed:

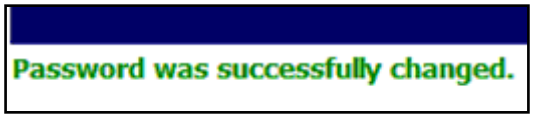


An email will be sent to the assigned email address for the CCG Account with a link that will open the page shown below.

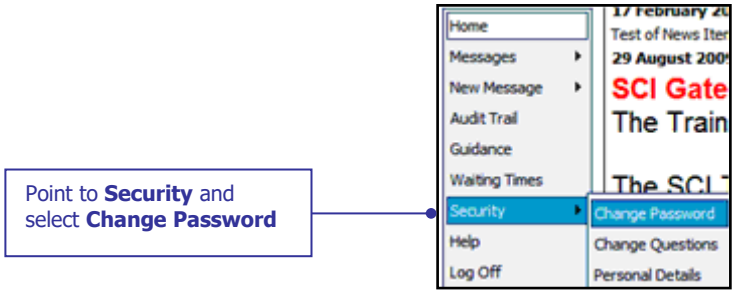




After clicking on Change Password you will be taken to the CCG Home page and a message will be displayed confirming you have changed your password.

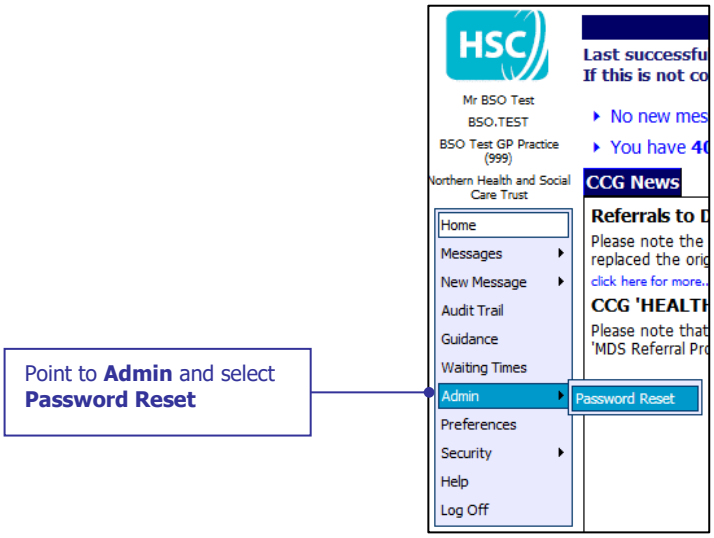


You can change your password at any time when you are logged in to CCG by pointing to Security and selecting Change Password from the Menu Bar as pictured below:

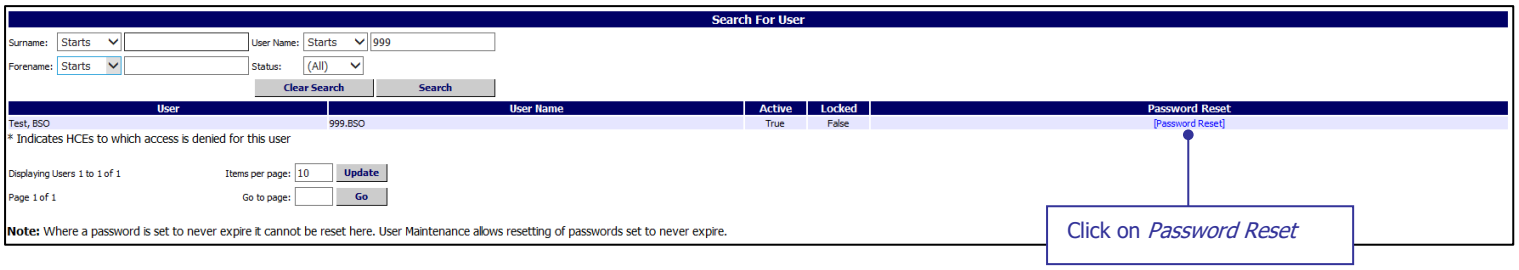


Reset Password in the Dental Practice

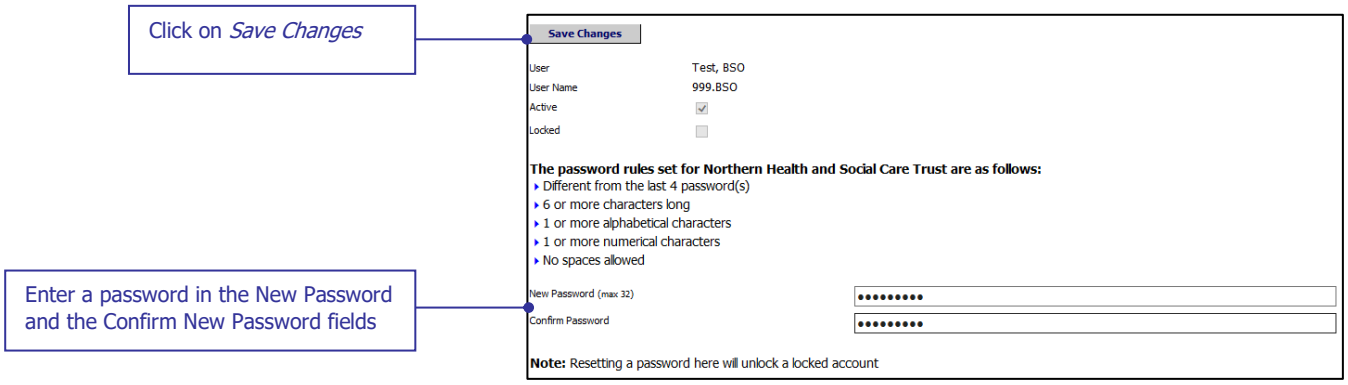
If a user requires a password reset, this can be done by the nominated user by selecting Admin from the menu bar.



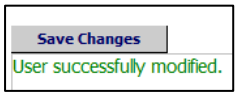
This will open the window below, where the relevant Search criteria can be filled in. clicking on 'Password Reset' will open a page where the new password can be set.



Set the new password and Save Changes to save the new temporary password

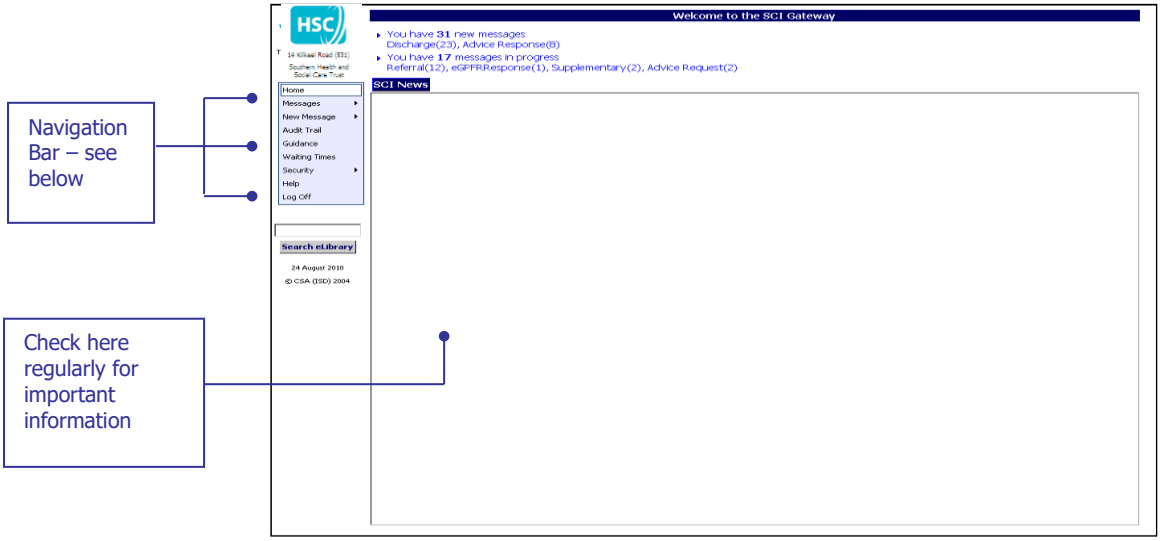


After clicking on Save Changes a message will be displayed confirming you have changed your password.



The CCG Homepage

The CCG Homepage is displayed when you log on to CCG. Some of the items in the navigation bar and links pictured may not be available, depending on how CCG is configured for your Dental practice.



Navigation Bar Options

Home	Return to the CCG homepage
Messages ▸	Allows users to access the messages worklists
New Message ▸	Allows users to make new messages – currently referrals
Audit Trail ▸	Allows users to access the audit trail
Guidance	Allows users to access local and national referral guidelines
Waiting Times	Allows users to access the HSC Waiting Times web page when available.
Security ▸	Allows users to change their password or security questions
Help	Allows users to access CCG online help pages
Log Off	Logs off CCG and closes Internet Explorer window

Navigation Links

Navigation links allow you to open the message worklist to display only those messages specified in each link. In the example pictured on the previous page there are '17 messages in progress' and '21 new messages received'.

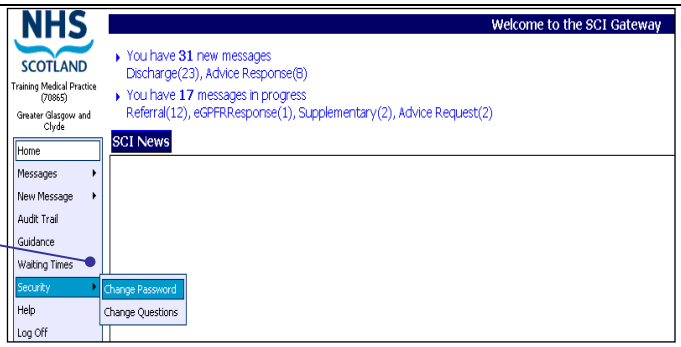
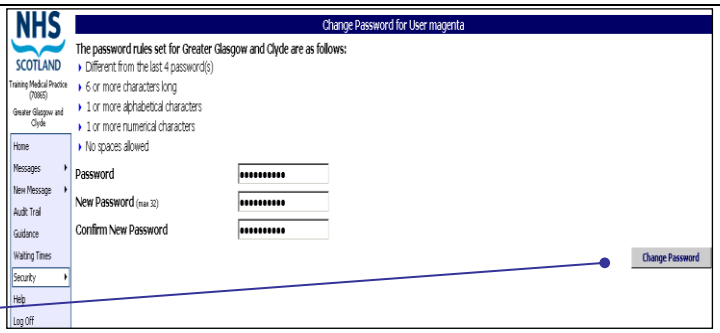
Using the links you can choose to display all 21 new messages in the worklist or you can choose the link to open the worklist for one message type. For example if you click on the 'Referral(21)' link it will open only the Advice Response worklist.

You have **21** new messages	Opens all new message worklists – Referrals and Supplementary messages. NB. you will only see those that you are configured for
You have **1** Referral in progress	Opens the referral worklist - filtered to show only referrals not yet sent.
You have 24 messages in progress	Opens the all message worklist - filtered to show messages not yet sent
Referral(21),	Opens the referral worklist - filtered to show only referrals not yet sent

Passwords In CCG

Changing Passwords

You can change your password at any time by following the steps outlined below.

1	Point to Security and click on Change Password Change Password	
2	Type in your current password and then enter and confirm your new password. Click on Change Password to make the change Change Password	

Password Security

- Your password must be at least six characters in length
- Your password must have a combination of alpha and numeric characters and is case sensitive
- Never write down your password or reveal it to others
- When keying in your password it will be displayed as a series of ●●●●●● so that it cannot be read
- When you change your password, the new one must not match any of the previous four passwords used for your user name
- If you think someone else may know your password, you should change it as soon as possible

Password Expiry

Passwords in CCG are configured to expire after 90 days. Messages indicating the countdown to the expiry date will be displayed when you log on from seven days prior to that date. You should change your password during this notification period.

Locked Account

If you attempt to enter the incorrect password 3 times the CCG account will lock and you will need an administrator to unlock your account.

Password Grace Period

If you do not change your password prior to it expiring, the system will initiate a 21-day grace period. If you log on during this time you will be prompted to change your password before you can proceed.

If you do not change your password prior to it expiring or during the 21-day grace period, a message will be displayed the next time you log on informing you that your password has expired. If this happens you can ask the Nominated user to reset your password in the first instance. If this is not possible you can contact the Helpdesk to have a new password issued.

3. Generating & Sending Messages

CCG uses protocols (templates) to generate messages, for example Referrals and Supplementary messages. Protocols are created and maintained by Business Services Organisation.

When you access CCG through your Dental practice, the protocol will be pre-populated with some of the information necessary to produce the letter/message, such as patient demographics and Health and Care Number.

Before using CCG to generate and send messages, practices and healthcare providers may wish to consider how the use of CCG for electronic referral interfaces with their individual business processes to use the system to its best advantage.

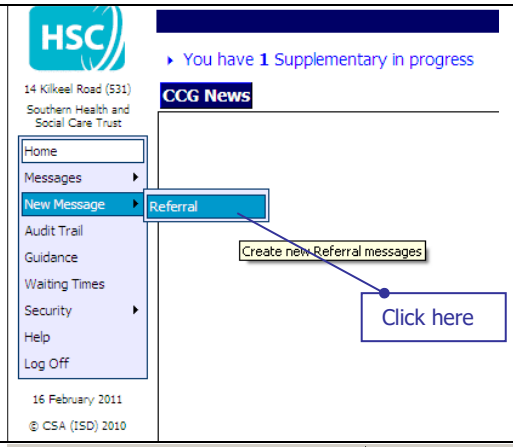
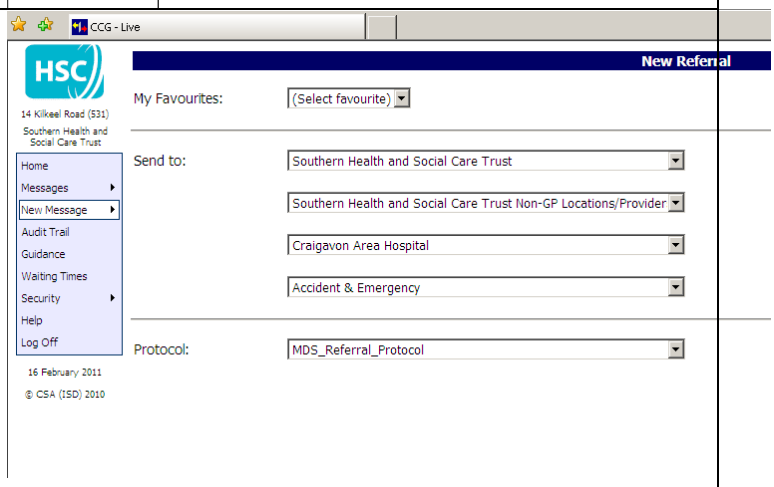
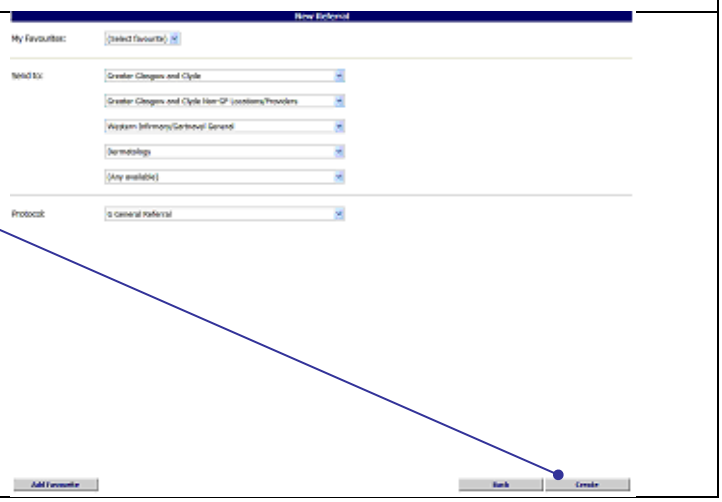
At this time the only new messages sent through CCG are Referrals; therefore this guide will use referrals to illustrate the generating and sending of messages. Additional message options may be configured in the future and training will be provided should this occur.

This section covers:

- Creating a New Message
- Completing a Protocol
- Previewing & Printing the Letter
- Parking a Message
- Adding Attachments to a Message
- Removing Attachments from a Message
- Sending the Message
- Further Options When Sending a Referral

Creating A New Message

The table below illustrates the steps to be undertaken when creating a new referral using CCG.

1	From the CCG home page, point to New Message and click on Referral	
2	In the New Referral screen, select the destination of the referral from the drop down lists then select which protocol you want to use. Alternatively select these options from My Favourites – see page 3-1 for information on My Favourites **Note:** Allow a few moments after selecting from the drop down lists for the screen to refresh	
3	Click on the Create button Create	

Note: The default HSC Trust area is determined by the location of the sender through CCG configuration, although it is possible to select a different trust area if required.

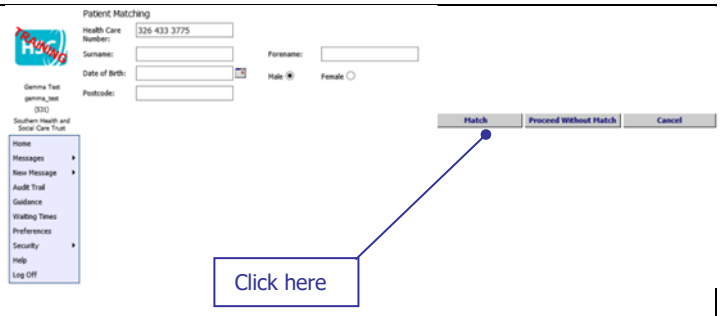
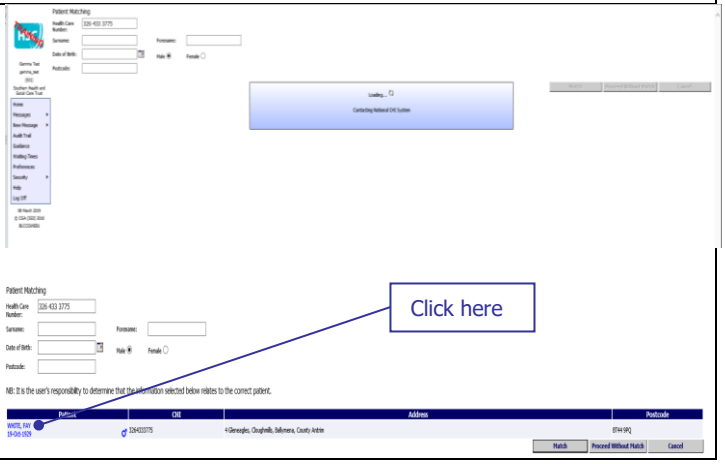
After choosing a destination and destination type (hospital/clinic) you can choose from the list of specialties available within that location. Below that there may be an option for choosing a clinician. This is a locally configurable option and may not be available in your trust area. Finally, you can choose the protocol.

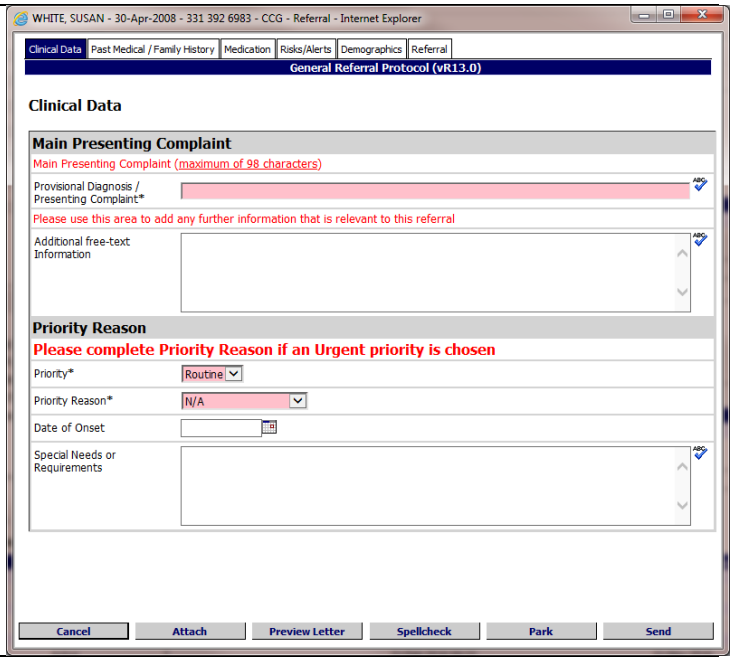
HCN Matching Adaptor

The HCN Matching Adaptor is a piece of software that sits between the Clinical Communication Gateway (CCG) and the Health + Care number (HCN) generic interface. It will receive matching requests from CCG, convert them and submit them as HCN matching requests.

The HCN Matching Adaptor will process the CCG lookup fields for HCN **or** surname, forename, date of birth and sex. Although the HCN generic interface does not use the postcode field for matching a correct postcode should still be entered as CCG will validate this against any matching records.

You will be presented with the 'Patient Matching' screen after you have pressed the 'Create' button to generate a referral as above. The table below illustrates the steps to be undertaken when creating a new referral using CCG.

1	Enter the Patient HCN **or** the look up field details as these are mandatory and press Match Match **Note:** if you are not using a HCN and leave out any of the mandatory fields you will not be able to return matching details	
2	A message will appear on screen to notify that the matching adaptor is loading **Note:** Allow a few moments after selecting Match for the matching adaptor to find the correct patient details and generate the referral letter	

3	The referral protocol will now open with the patient demographics having been matched and extracted	

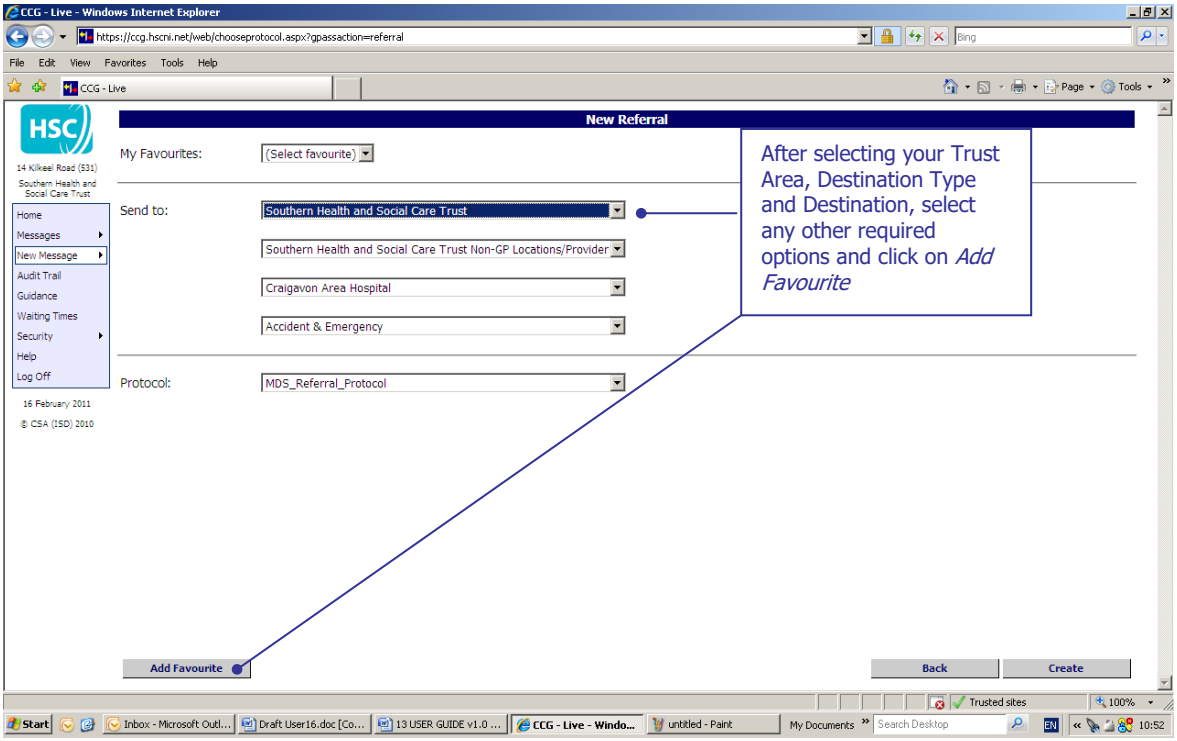
Note: Where necessary you can bypass the Patient Matching screen by selecting Procced without Match and a blank referral protocol will open.

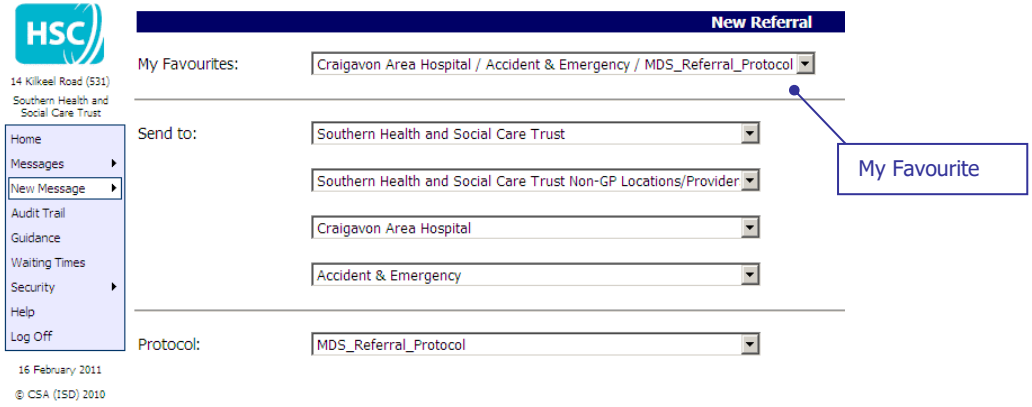
My Favourites

Users can create a list of shortcuts to destinations and services they use most frequently. This facility is particularly useful for practices that regularly send messages to services out with their own trust area.

When selecting the destination options for your messages you will find the Add Favourite 

button. This button allows you to add the destination and service type for your message to your list of favourites.





You will now be able to select the destination and service from the My Favourites drop down list anytime you create a message – this will pre-populate the relevant fields.

My Favourites Options

- Destination – You can create a favourite where the link populates the destination field for the hospital/clinic only. For example 'The Ulster Hospital'.

- Specialty/service – you can create a favourite where the link populates the specialty field with a specific specialty at the hospital destination. For example 'Ophthalmology' at 'The Royal Victoria Hospital'

- Healthcare Professional/Other - You can create a favourite where the link populates the consultant field with a specific consultant, for the specialty at the hospital. For example Consultant's name, General Surgery at The Ulster Hospital.

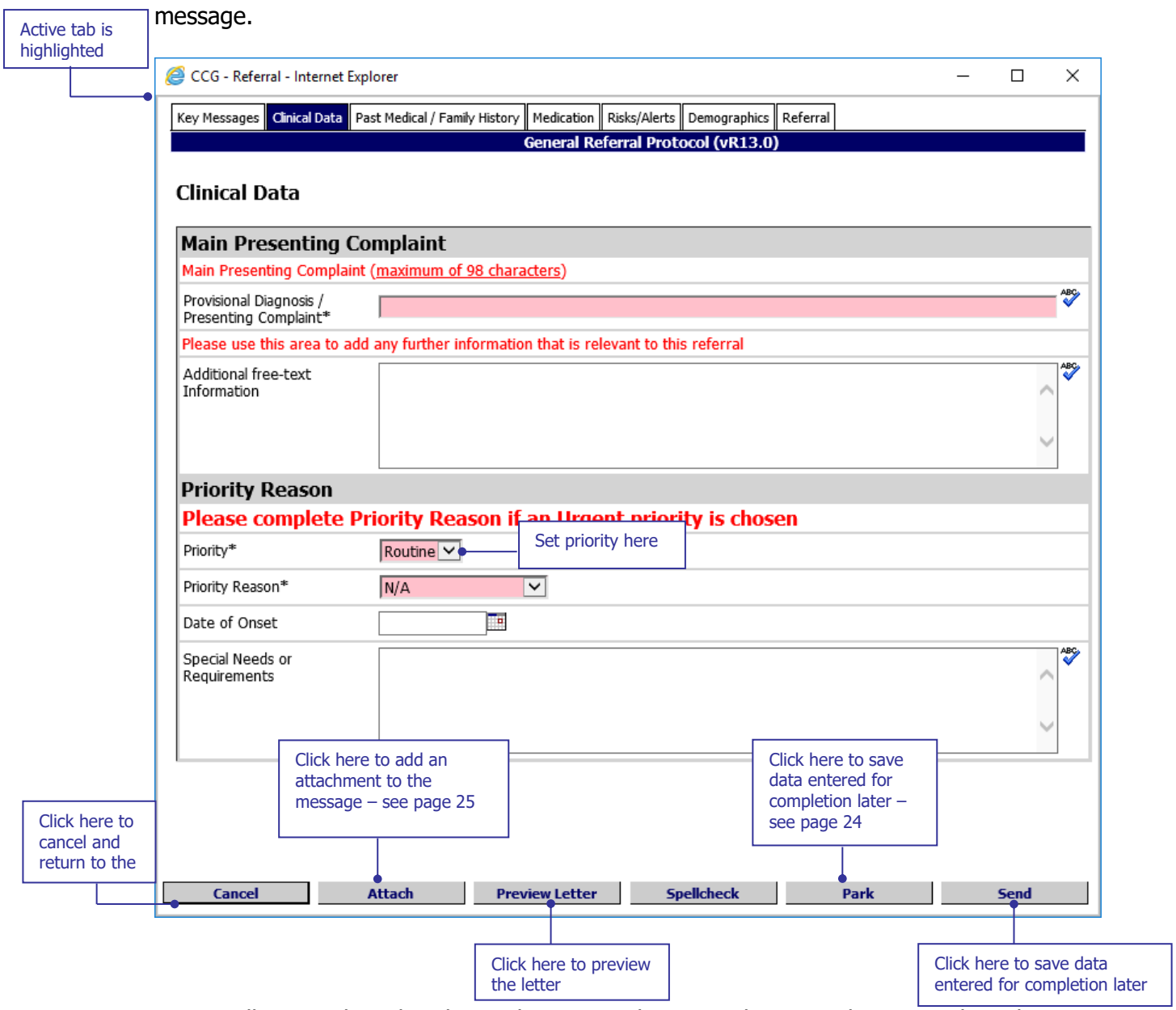
- Protocol – You can create a favourite where the link populates the protocol field with a specific protocol for a specialty at the hospital. For example AC Upper GI, General Surgery at The Ulster Hospital.

The list in **"My Favourites"** is unique to your login.

4. Completing A Protocol

The Protocol Window

When you click on the Create button, a protocol window similar to the one pictured below will open, allowing you to enter and review information you wish to appear on the message.



Note: All protocols within the application work in a similar way. The protocol window consists of a series of tabs that allow you to enter information you want to include in the referral letter.

Fields marked with an asterisk and coloured pink are mandatory and must be completed.

Commonly Used Tabs

Although protocols can differ greatly in layout and what information is required, there are certain commonly used tabs which will appear in most protocols.

If you have accessed CCG from a patient encounter in your primary care system, many of the fields will be pre-populated with data from the patient's record. Data used to pre-populate the fields is dependent on the protocol used.

Tab Content	Function
Clinical data	Records the diagnosis / presenting complaint, and any related information
Past Medical/Family History	Records any relevant past medical history – you can delete any history pre-populated from your primary care system that is not relevant
Medication	Records details of any Current Medication or Other Recent Medication
Risks / Alerts	Records details of risks and alerts for the patient, such as allergies, intolerances, tobacco and alcohol consumption, etc.
Demographics	Records details of patient's name, address, Health Care Number, etc.
Referral	Records details of the sending practice and the referring/requesting Optometrists

Help Links

Help links – indicated by a Help  icon – are included for certain fields to assist in the completion of the referral. Clicking on the icon opens a message box containing information relevant to the field.

Add / Delete Rows

You can add a row in certain parts of the protocol by clicking on the 

button.

You can delete rows in certain parts of the protocol by clicking on the delete  button – this can be used to ensure irrelevant data is not included in the referral letter.

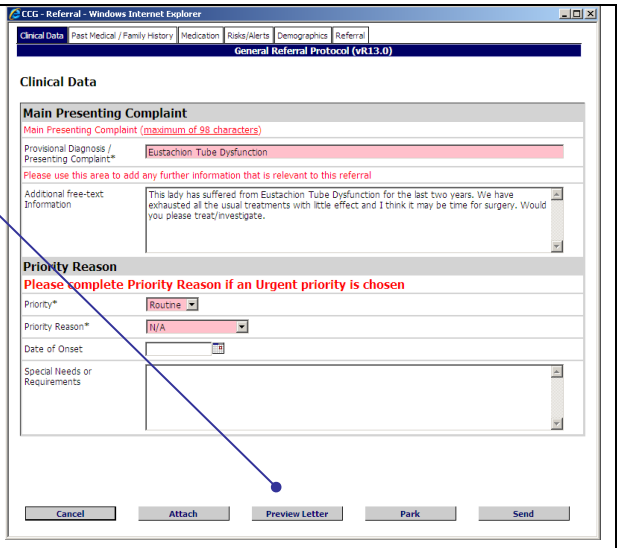
Previewing & Printing The Letter

You can generate a preview of the letter, and print it if required, prior to completing the protocol and sending the message. For example, you may wish to print a copy of the referral letter to retain in the patients clinical record before sending.

1

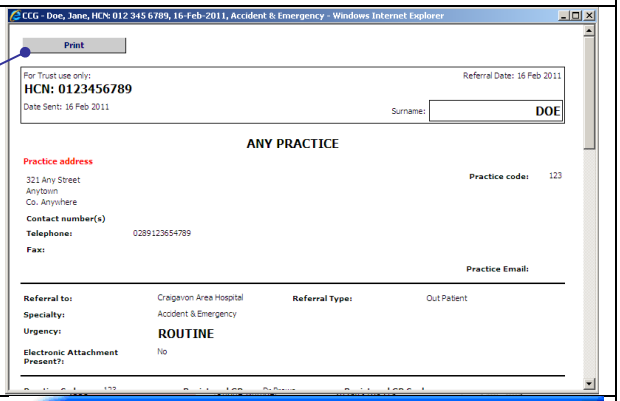
In the Protocol window, click on the Preview Letter button

Note: If the referral has been previously parked (see following page) you will have to open it by clicking on the patient name in the Referral Worklist



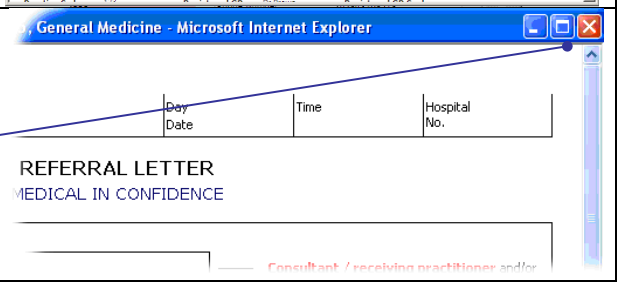
2

The letter is displayed in a separate window – click on the Print button to produce a printout



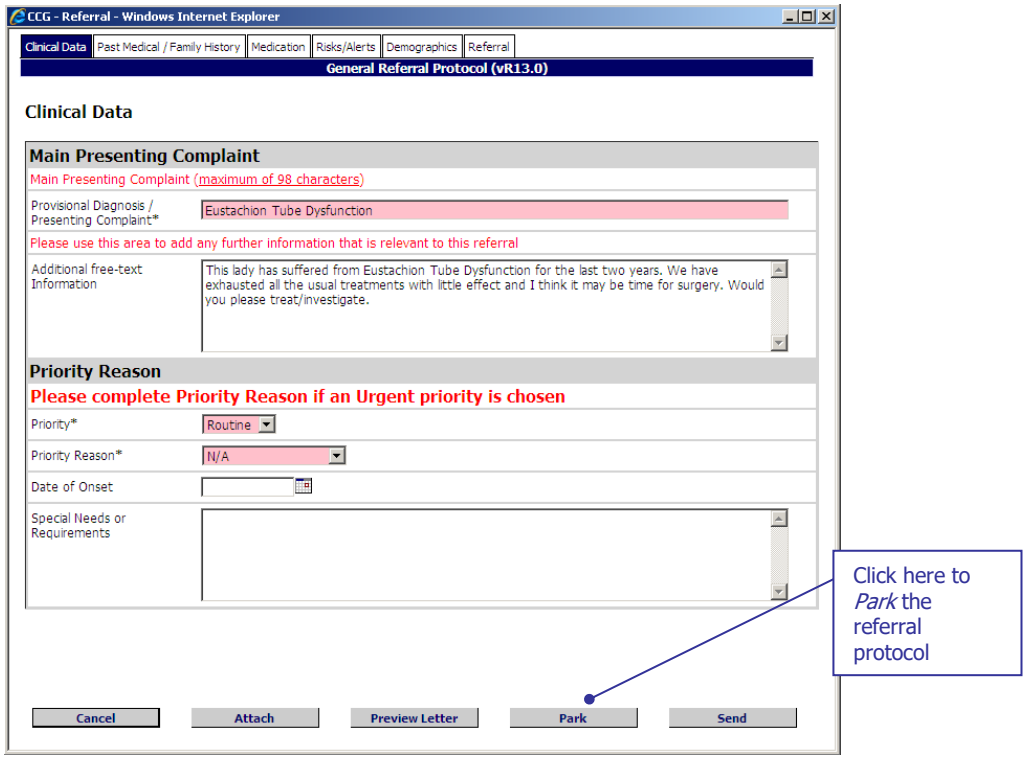
3

Close the Preview Letter window by clicking on the Close icon – you will return to the Protocol window



Parking A Message

Parking a message allows you to save the information entered in the protocol; **the message is not sent to the hospital at this stage.**

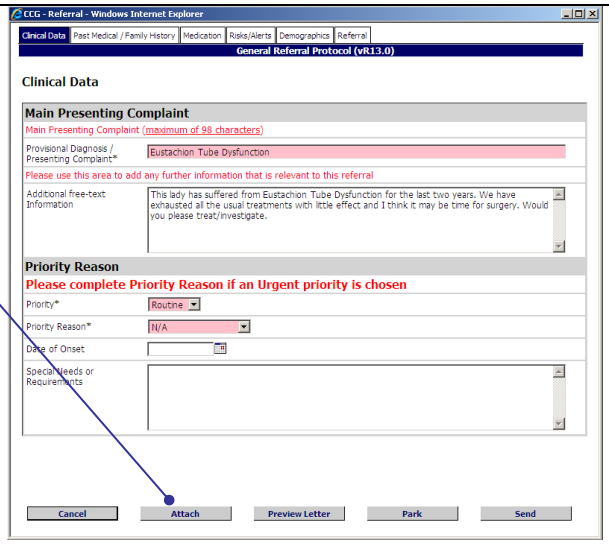
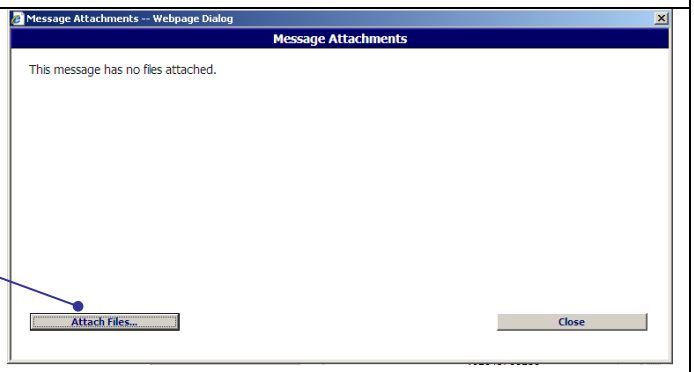
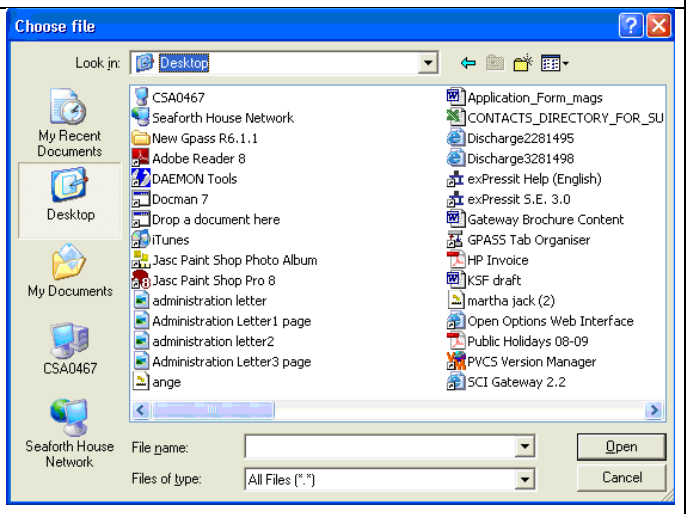


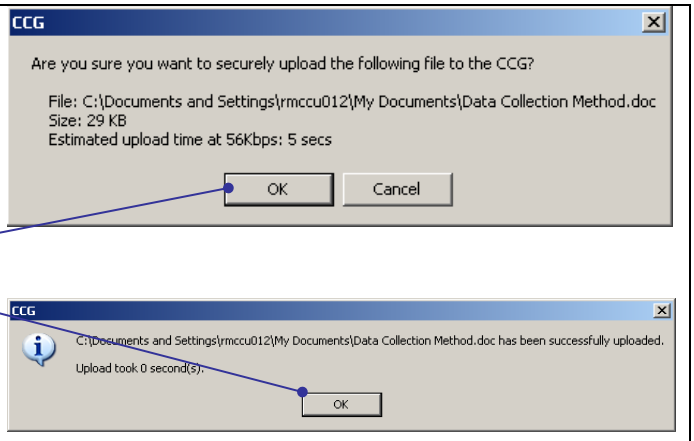
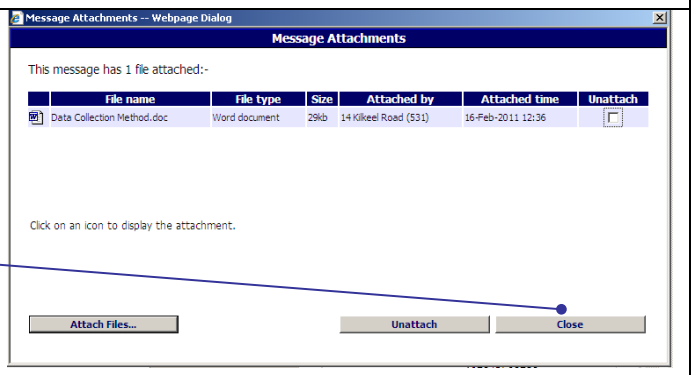
Note: When you park a message for the first time it is given the default status for messages that have not yet been sent – this is "In Progress."

The Referral Worklist pictured above shows referrals for several patients.

Adding An Attachment To A Message

You can attach a file to a message, such as a Word document or a picture, by following the steps outlined below.

1	With the Protocol window open, click on the Attach button Attach	
2	In the Message Attachments window click on Attach Files… to add a file from your local area network or PC Attach Files...	
3	In the Choose File window, navigate to the location of the file you wish to attach and click on the file to highlight then click on Open	

4	Click on OK to accept the next two confirmation messages Click on *Ok* to acknowledge the messages	
5	The attachment is displayed with an icon depicting the type of file attachment e.g. Word document Click on *Close*	

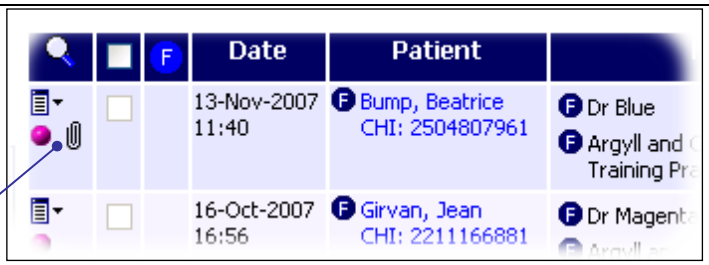
Note: Messages with an attachment are shown in the message Worklist by the paperclip icon.

Removing Attachments From A Message

You can unattach a file that you have attached to a message in error. Follow these steps:

1 Click on the Paperclip to open the Message Attachments window for the message required

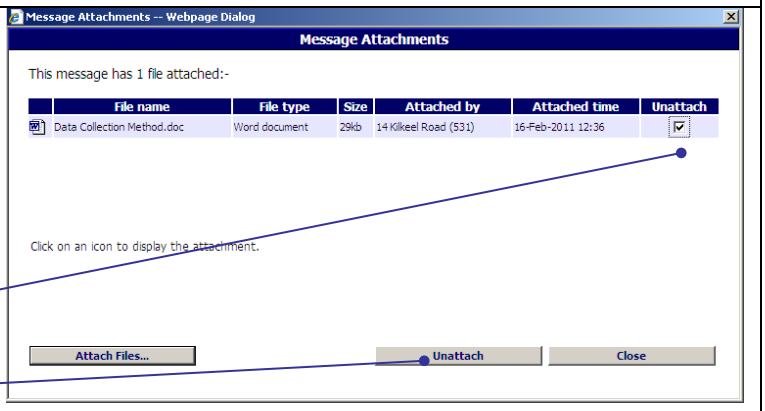
Click here to open



2 The Message Attachments window is displayed. Place a tick in the Unattach box and click on Unattach

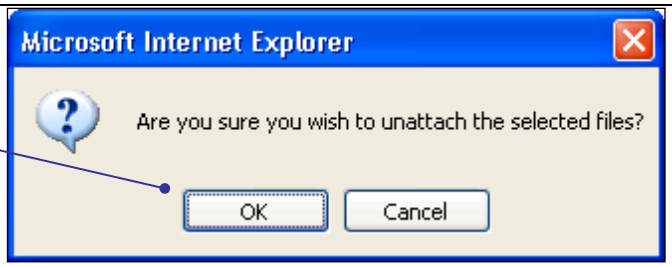
Place a tick here

Click on *Unattach*



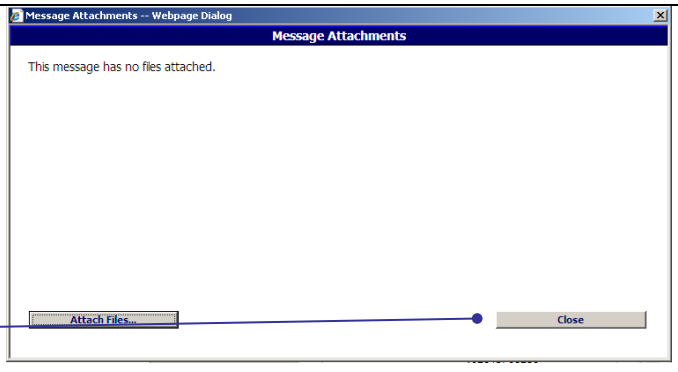
3 Click on OK to confirm

Click on *OK*



4 The Message Attachments window confirms that the message no longer has an attachment. Click on Close to return to the worklist.

Click on *Close*

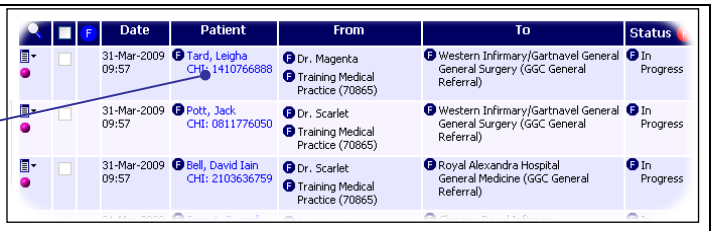


Sending The Message

When a protocol has been completed and the message is ready to be sent, search for the relevant entry in the Worklist, in this instance the Referral Worklist and follow the steps outlined below. See Section 5 for more information about searching the Message Worklist.

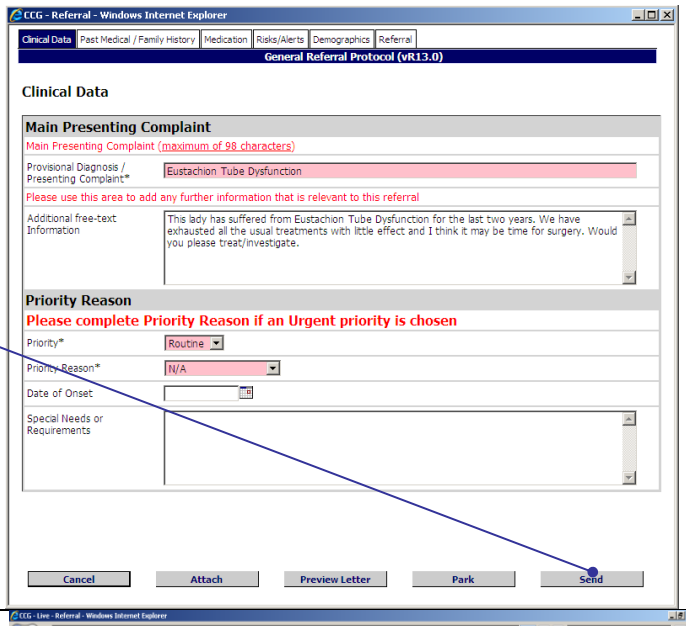
1 From the Worklist, click on the patient name for the message you wish to send

Click here



2 In the Protocol window, ensure all required data has been entered and click on the Send button

Send

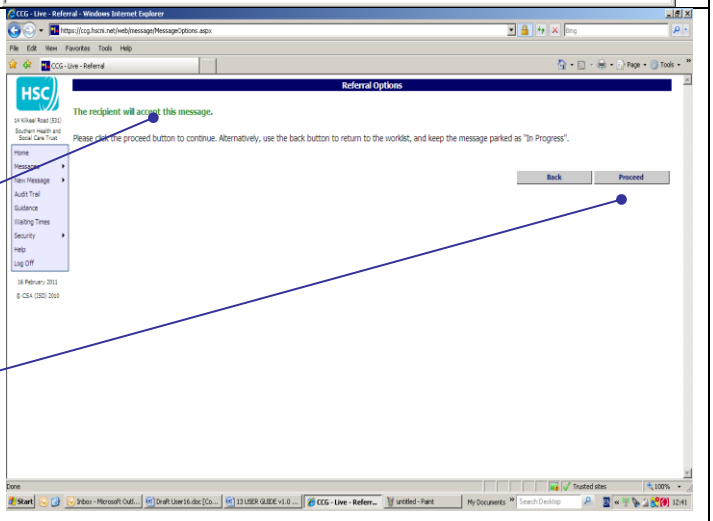


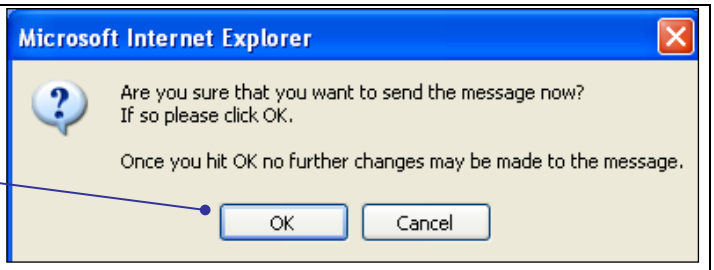
3 The Referral Options window will be displayed with the header indicating that the message will be accepted

The recipient will accept this message.

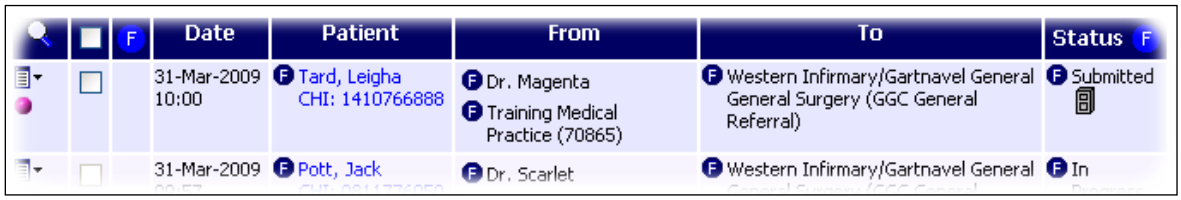
Click on the Proceed button to continue

Proceed



4	A final message box will be displayed. Click on Ok to confirm Click on *Ok*	

The completed referral is sent to the specified healthcare provider via CCG. When the referral is completed you are returned to the relevant Worklist and the status indicates that the message has been **"Submitted"** as shown below.



Date	Patient	From	To	Status
31-Mar-2009 10:00	Tard, Leigha CHI: 1410766888	Dr. Magenta Training Medical Practice (70865)	Western Infirmary/Gartnavel General General Surgery (GGC General Referral)	Submitted
31-Mar-2009	Pott, Jack	Dr. Scarlet	Western Infirmary/Gartnavel General	In

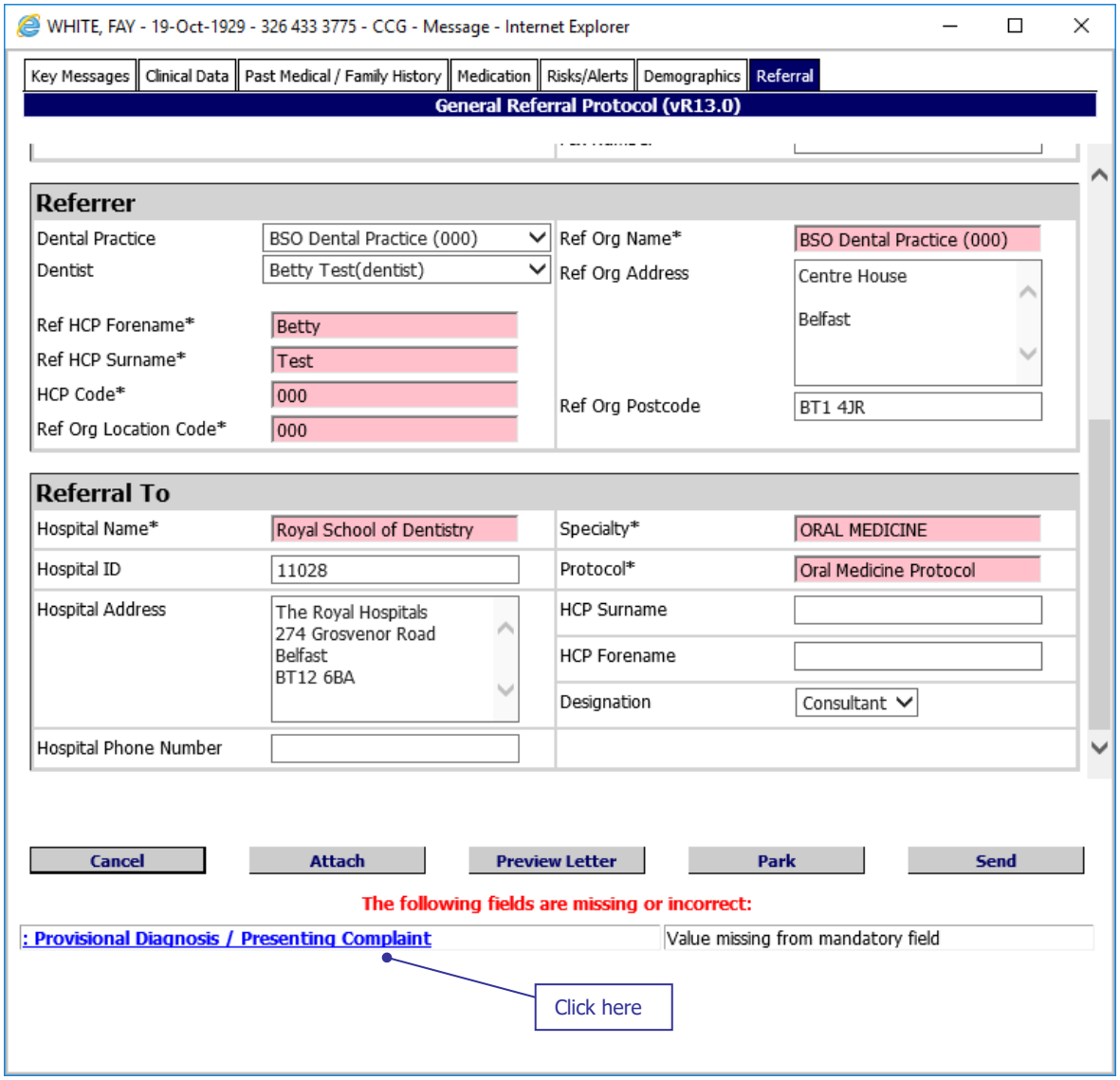
If you are managing your referrals with the worklist filtered for 'In progress' referrals the newly submitted referral will not be displayed. To see the referral open the full Referral Worklist, see Section 5

Please be aware that a referral with an "In Progress" status has NOT been sent and will NOT have been received by the intended hospital.

Referrals will only have been sent when both 'Send' and 'Proceed' have been clicked and the status is shown as "Submitted"

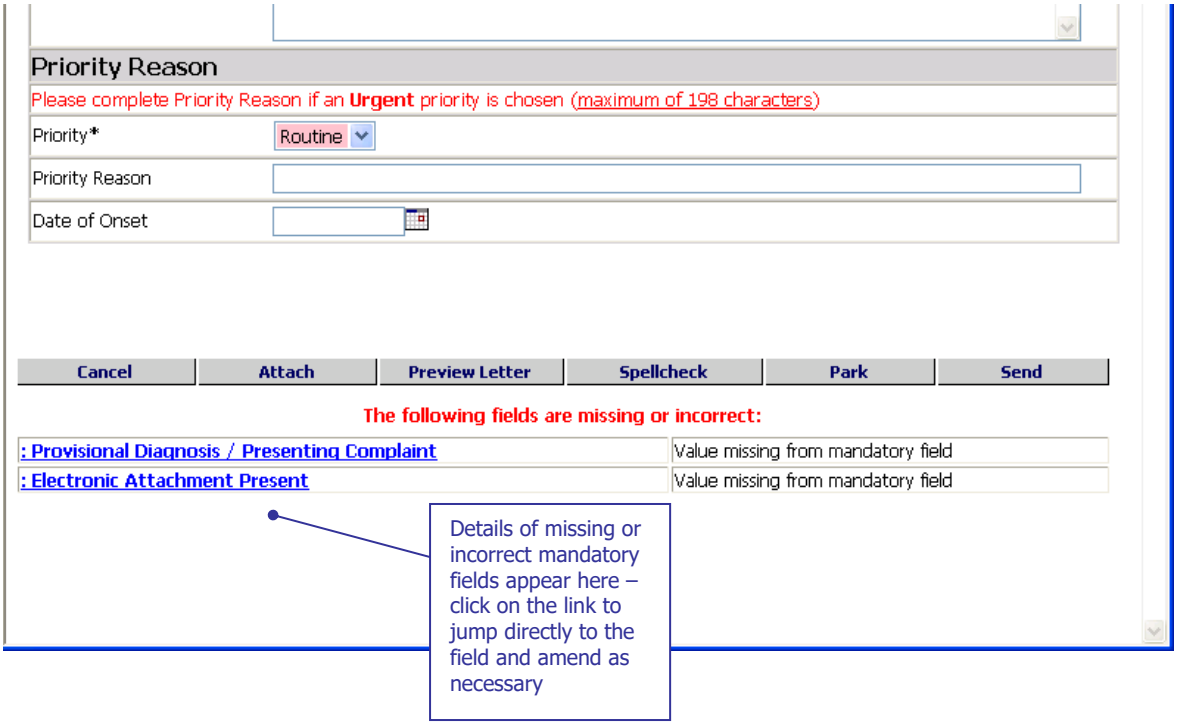
Validating a Message

When you click on the Send button, the application checks the protocol to ensure all mandatory information has been included. If a mandatory field has been left blank a hyperlink message will appear at the bottom of the protocol to alert you. You can click on the hyperlink to take you to the specific mandatory field which has been left blank.



Checking Mandatory Fields

After the system has checked the Registered and Referring / Requesting Dentist details as described on the previous page, it will check for errors or omissions in any mandatory fields.


Priority Reason
Please complete Priority Reason if an Urgent priority is chosen (maximum of 198 characters)
Priority*
Routine
Priority Reason
Date of Onset
Cancel
Attach
Preview Letter
Spellcheck
Park
Send
The following fields are missing or incorrect:
: Provisional Diagnosis / Presenting Complaint
Value missing from mandatory field
: Electronic Attachment Present
Value missing from mandatory field
Details of missing or incorrect mandatory fields appear here – click on the link to jump directly to the field and amend as necessary

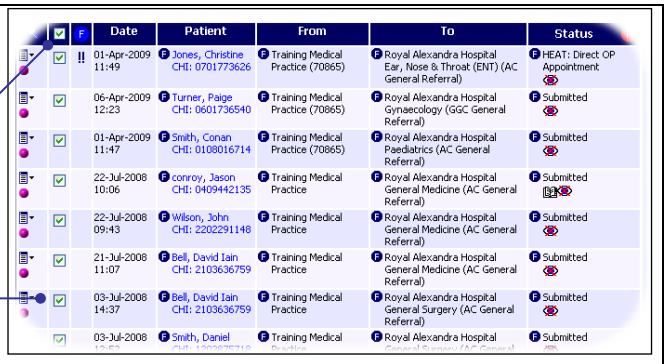
Printing Messages

Bulk Printing

You can use the CCG bulk printing function to print all messages on the Message Worklist page, or a selection of messages, by following the steps outlined below. Alternatively you can print messages individually – see page 4-5.

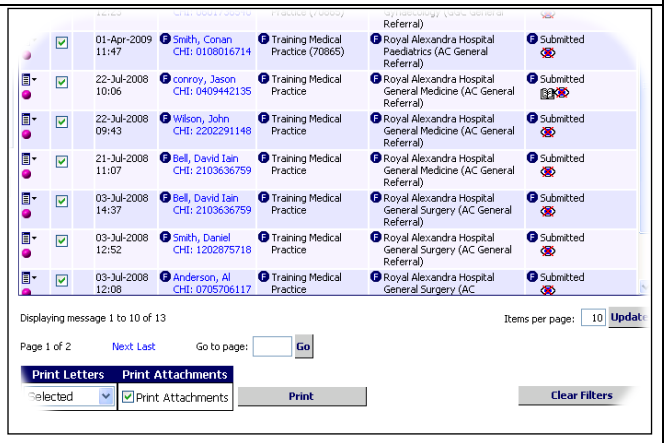
1 Click the tick box beside each message you wish to print – alternatively click the tick box in the column header to select all messages on this page of the worklist

Click here to select all or in the boxes to select individual letters

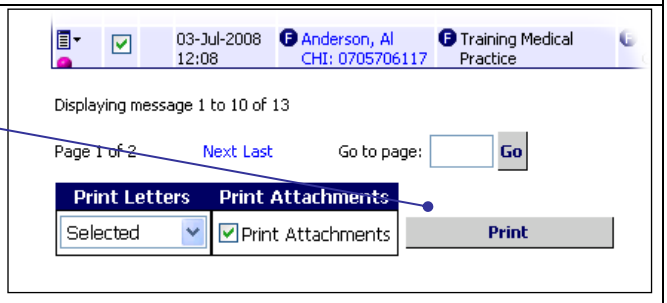


2 The Print Attachments box is ticked by default – remove if required. Messages with attachments are indicated by the paperclip icon

Ensure Selected is displayed in the Print Letters drop down field



3 Click on the Print button to print all selected referrals



Messages that have been printed have the Printed and Viewed flags applied and therefore will no longer appear on the worklist unless you clear the filter– see Section 4 for more information on flags.

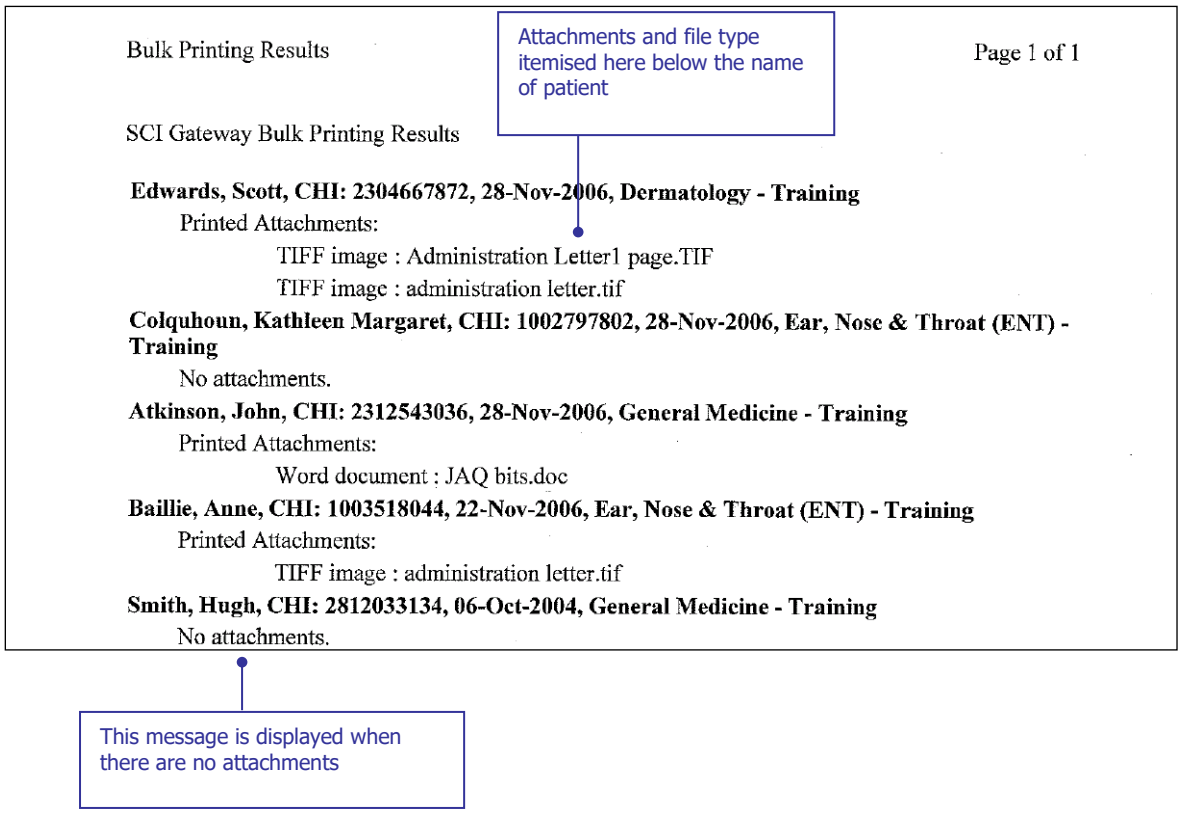
When bulk printing multiple messages as described above, only certain attachment formats will be printed automatically – specifically .txt, .doc, .rtf, .tif, .bmp, .jpg and .gif. Other types of

attachment can be viewed and/or printed individually for example .pdf - see page 25.

Bulk Printing Confirmation Sheet

When printing multiple messages using the bulk print option, a Bulk Printing Results sheet itemising the messages that you have just printed will be produced at the end of the print run. It will also itemise number and type of attachments associated with the message.

Pictured below is an example of a confirmation sheet.

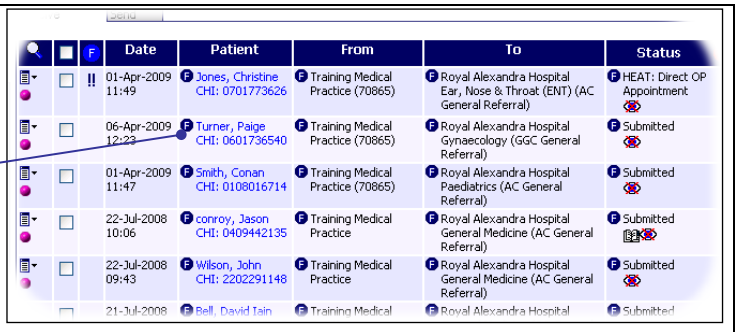


Opening And Printing Individual Messages

As an alternative to bulk printing messages, it is possible to view and print individual messages.

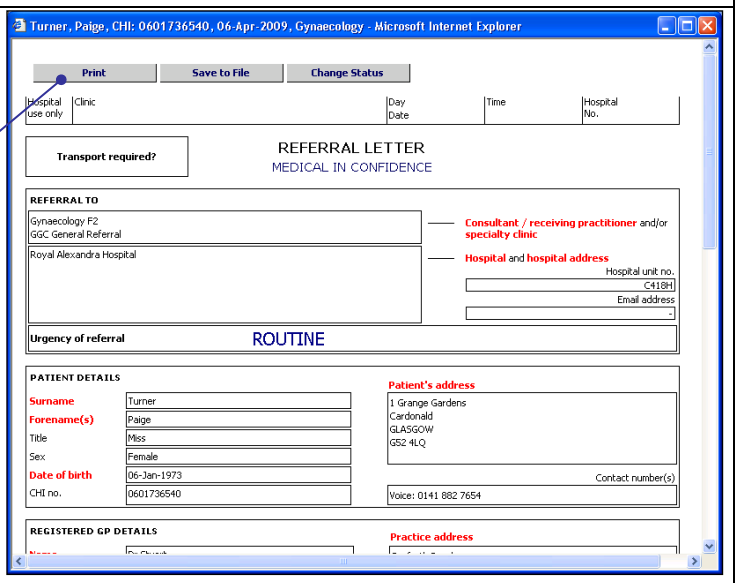
1 In the Message Worklist click on the Patient name to open the letter

Click here

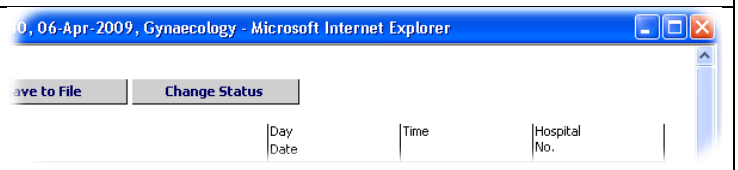


2 The letter is displayed in a separate window – click on the Print button to produce a printout

Print



3 Close the Preview Letter window by clicking on the Close icon – you will be returned to the Worklist



Note: If you print a letter as described above, any attachments will not be printed. Attachments can be printed separately – see next page.

When you open a new message, or print it individually or using bulk printing, the 'Viewed' flag is set which is seen by both the sender and receiver.

Opening a new message as shown in step 1 will not remove the message from the New Messages worklist.

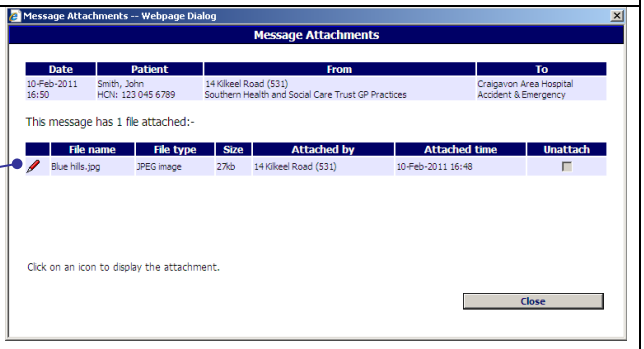
Opening Individual Attachments

When bulk printing messages, you have the option to print attachments at the same time. However, only some types of files will be printed using this method. You can open individual files that have been uploaded as attachments to referrals (and subsequently print them if required) by following the steps outlined below.

1 Click on the paperclip icon next to the message to display the list of attachments

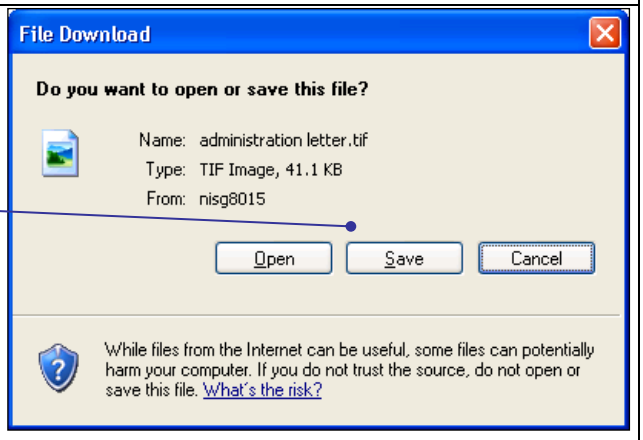
Click here

2 The Message Attachments screen is displayed – click on the relevant icon to download the file



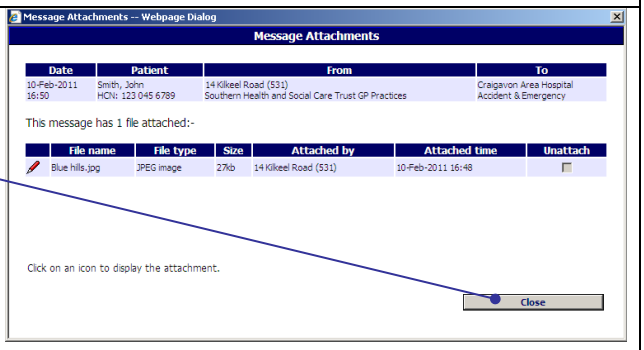
3 In the File Download dialogue box, click on Open to open the file or Save to save the file to your computer

Click on *Save*



4 To return to the Message Worklist click on Close

Click on *Close*



5. Managing the Message Worklists

You can manage all of your messages using the message worklists. You have the option to view all types of messages together or open individual worklists by selecting the option required, for example Referrals.

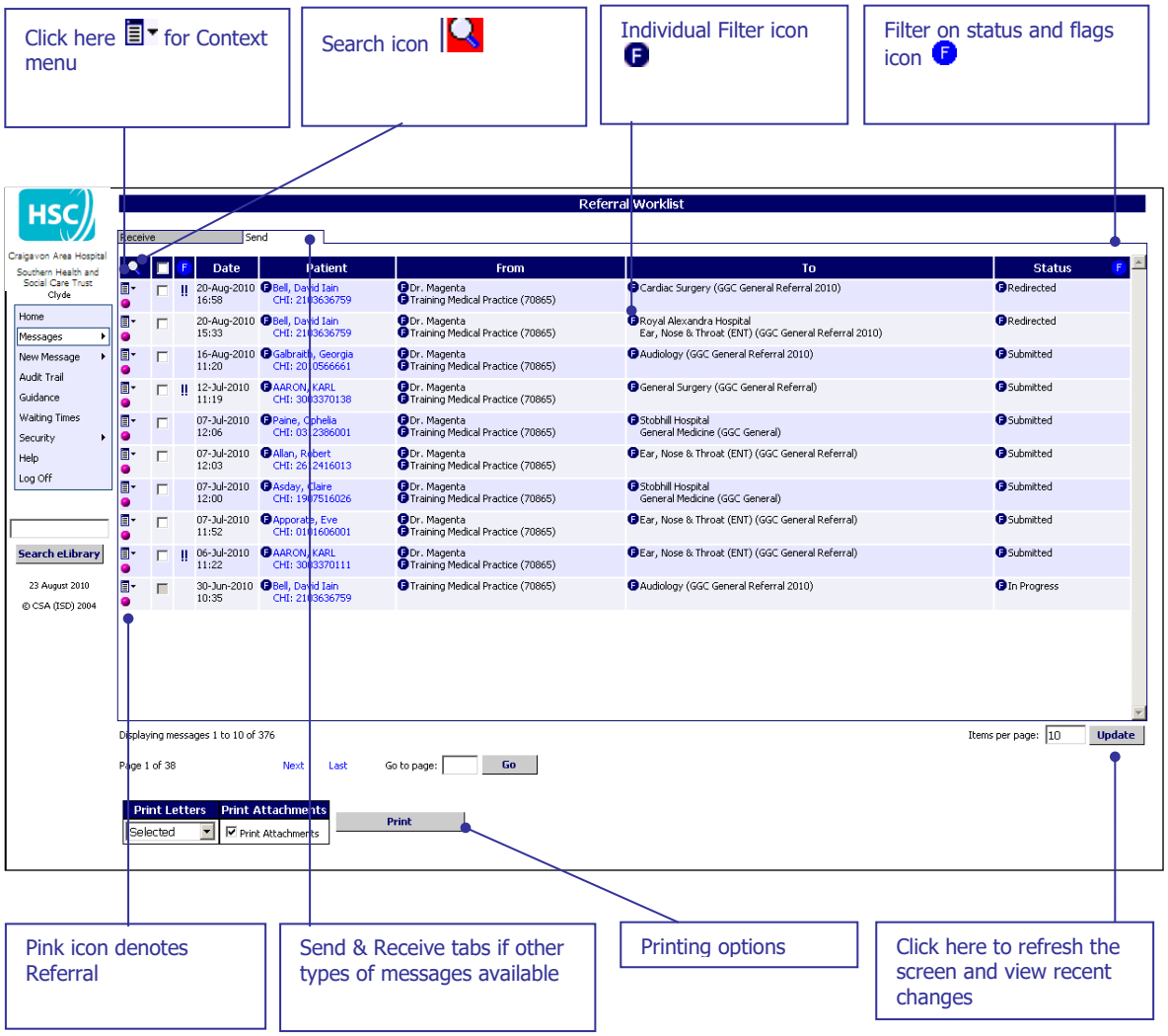
How you access the message worklists will differ depending on whether you are a hospital and use the CCG icon on your desktop or with an outpatient management system or if you are a Dental practice and access within the practice.

This section covers:

- The Message Worklist
- Sorting the Worklist
- Filtering the Worklist
- Statuses and Flags
- Changing the Status
- Flags in CCG
- Flagging a Message as Filed
- Filtering on Status and Flags
- Searching the Message Worklist
- Cancelling and deleting messages

The Message Worklist

Pictured below is an example of the Message Worklist. It provides a range of options to help you view and manage your referrals and other messages. You can access the full Message Worklist at any time by pointing to Messages and clicking on All on the navigation bar on the left-hand side of the screen. This will display all message types that you are configured for. Alternatively clicking on Referrals or any other option will open the specific worklist required.



Note: If you have the capability to receive and send messages you will have the Send and Receive tabs displayed at the top of the worklist. The white tab is the active tab. On opening, the worklist is filtered to display messages for one month only.

Message Icons

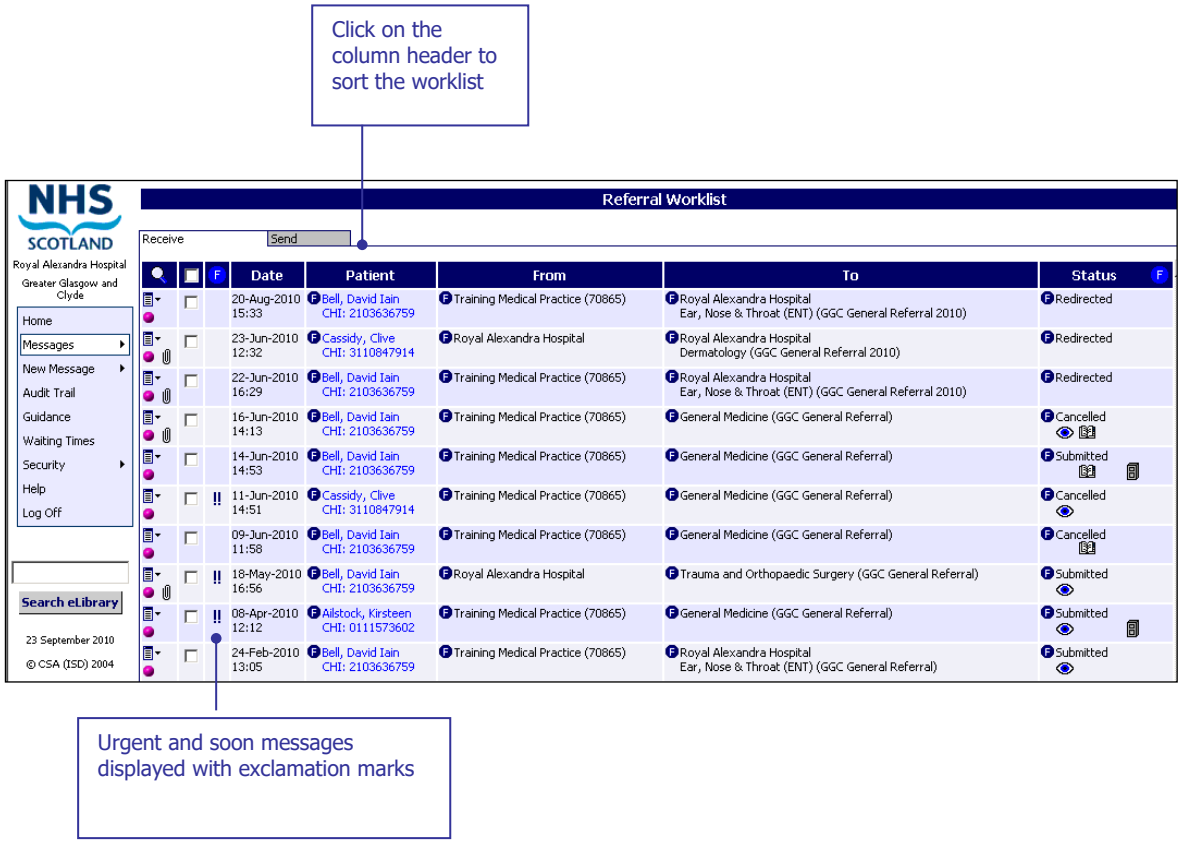
Each different message type on CCG is denoted with a unique icon to make the message type easily identifiable.

Referral	

Sorting the Worklist

By default, information in the Message Worklist is organised by date and time. However, when you open your new message work list urgent messages are displayed higher in the worklist than Routine messages sent earlier and are highlighted in the priority column.

You can sort the list according to your requirements by clicking on the relevant column header – in the example pictured below.

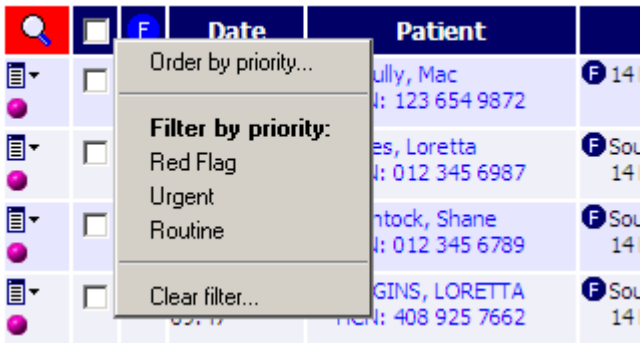


Note: In the new messages worklist the urgent messages are displayed at the top of the worklist, taking precedence over more recent messages. A Red Flag donates a Suspicion of Cancer referral. Two exclamations !! denote urgent and a blank denotes routine.

Arranging the Worklist by Priority

Once you have printed your new messages they are removed from the New Messages worklist and can be found by selecting a specific message worklist or the 'All' worklist. The usual order of date and time will be the default. You will have the option to filter or order the worklist to suit your needs.

Click on the F icon to Filter/Order the worklist and then select option required



Order by priority

This option will reorder the worklist to show urgent and soon priority messages at the top.

Filter by priority

This option allows you to filter the worklist to show only Red Flag, Urgent or Routine messages depending on the option selected.

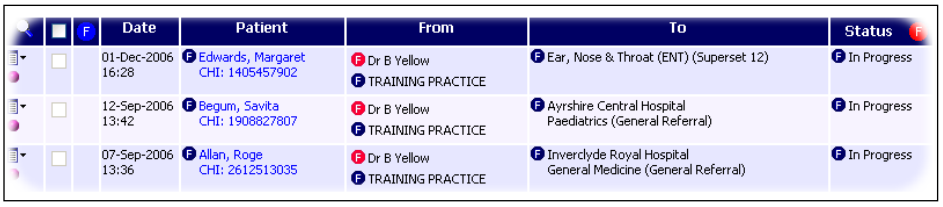
Clear Filters

This option allows you to clear any priority filter you have applied and display the full worklist.

Filtering the Worklist

You can click on any of the Filter F icons to show only those messages containing the filtered item. For example, filtering on the Optometrist Name will only show messages for that Optometrist – the Filter icon will turn red F to show the filter has been applied.

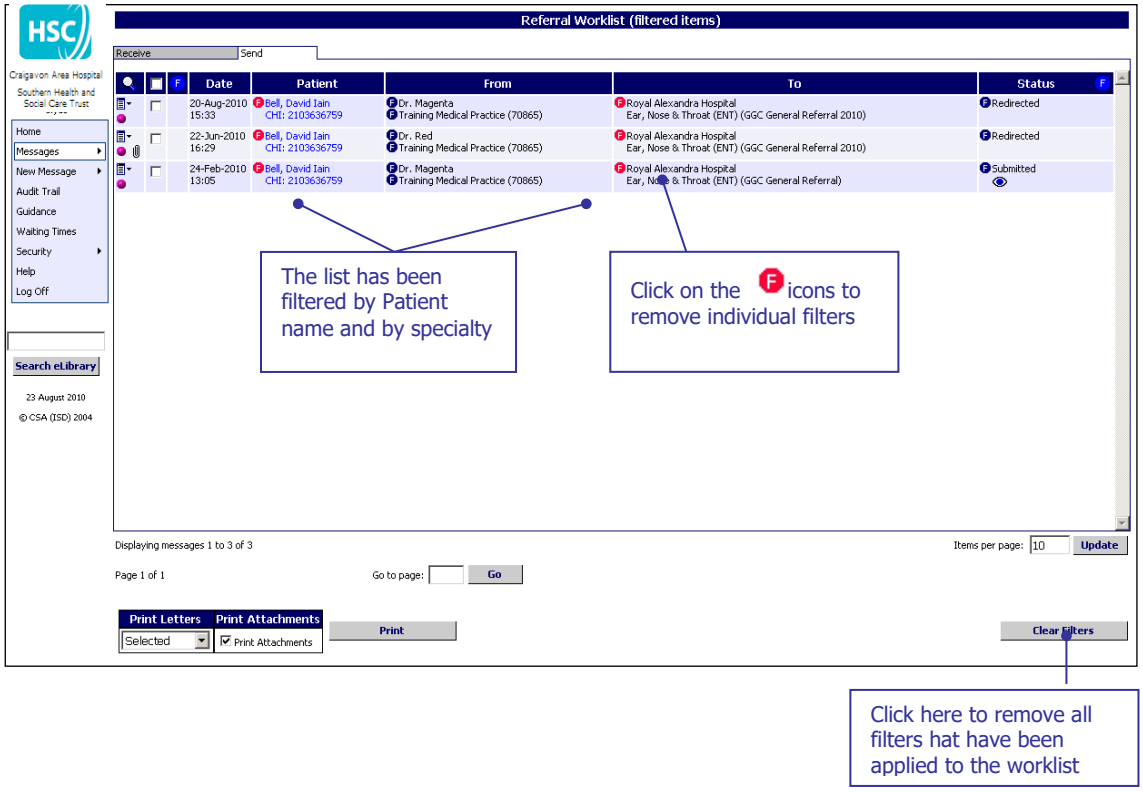
The list has been filtered by Dentist Name



Note: You can have more than one filter applied at the same time. For example, if your Referral Worklist has been filtered to show only referrals for a selected Dentist you can further filter the list to only show In Progress referrals.

Removing Filters

You can remove individual filters that you have applied by clicking on the red Filter icon – other filters will be unaffected.

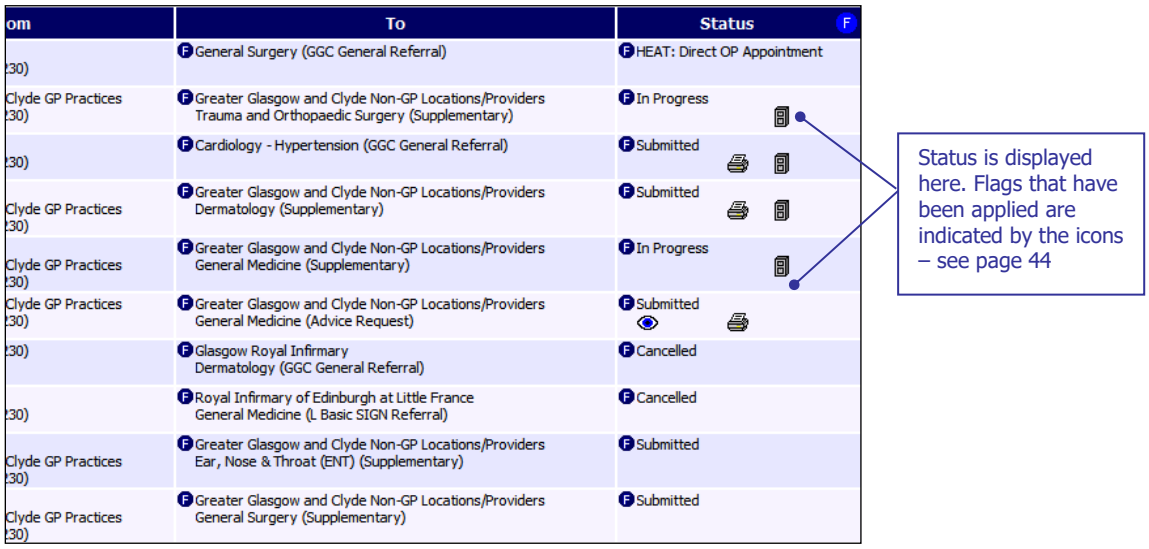


Note: To remove all filters, click on the Clear Filters button as illustrated above. This option will also remove priority and status and flags filters.

Care should be taken when filtering on Dentist Name. The name may differ depending on whether it has been typed into the protocol or pre-populated from a primary care system or the ISD reference file, and only those referrals which exactly match the spelling and format of the Dentist Name on which you have applied the filter will be returned.

Statuses And Flags

Statuses and Flags allow users to monitor the progress of messages accurately, both within the practice and hospital.



Statuses

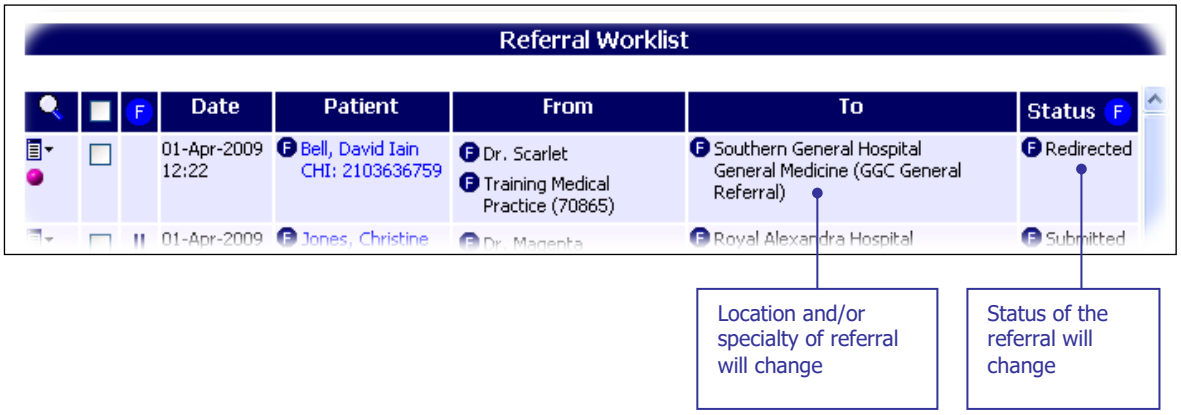
Statuses are automatically applied to messages, depending on what stage they are at in the process. For example if a referral is parked before being sent, it will have the default In Progress status applied. When it is sent, it will have the default Submitted status applied.

Redirected Referrals

Once a referral has been received and vetted by a clinician, there may be occasions when the most appropriate course of action is to redirect the referral to another specialty and/or location.

When a referral is redirected on CCG to another specialty or location within the user's permission range the associated details displayed in the worklist will change. The date and time will be changed to reflect when the redirection took place (i.e. when the referral was re-sent through CCG). The location and/or specialty will be replaced with the new details and the Status will indicate that the referral has been redirected.

If the referral is redirected to an area outwith the user's permission range the referral will disappear from the hospital worklist. Pictured below is an example of a redirected referral.



Note: It is not possible for a practice to redirect a referral. Please check the relevant section in this guidance for more information on how to redirect referrals.

Flags

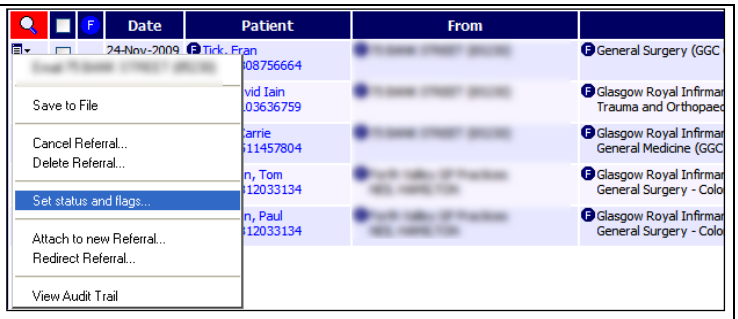
Flags are designed to show what actions have been carried out against a message, either within the practice or by the hospital once the message has been submitted. Flags are usually applied automatically, for example**" Viewed"** when the hospital opens or **"Printed"** when the hospital prints a referral.

You can apply a flag of **"Filed"** if you want to record the fact that a copy of the message has been kept. See page 5-10 for more information about the use of flags in CCG.

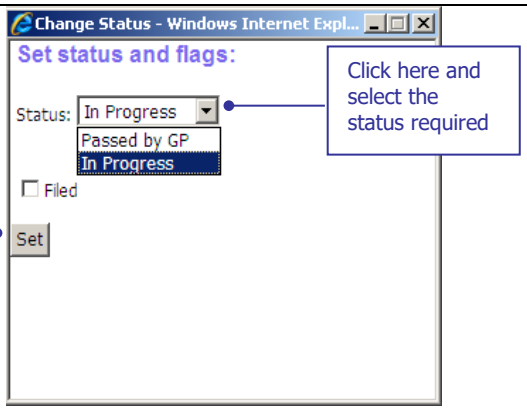
Changing The Status Of A Message

You can change the status of a message by following the steps outlined below. For example, you may wish to assign a different status for a referral.

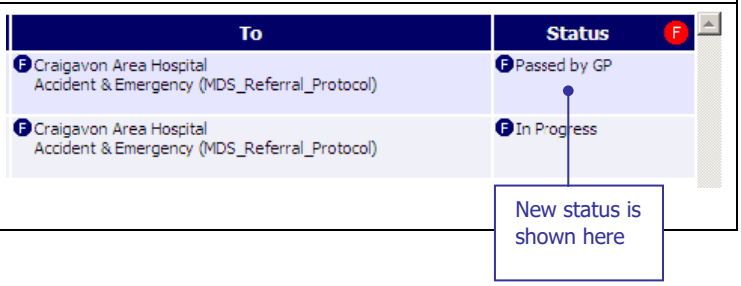
1 Click on the Context menu next to the message you wish to change the status of and select Set status and flags...



2 Select the status you wish to assign to the message from the Status drop down list



3 The screen will refresh and the message will be displayed in the Message Worklist with the new status



Note: Changing the status of a message is only possible if CCG has been configured to allow this by the local health board area.

Once the message has been sent the status may be updated automatically depending on what the receiver does with it. Any changes to a status will automatically update the status in both the receiver's and the sender's Message Worklist.

Flags In CCG

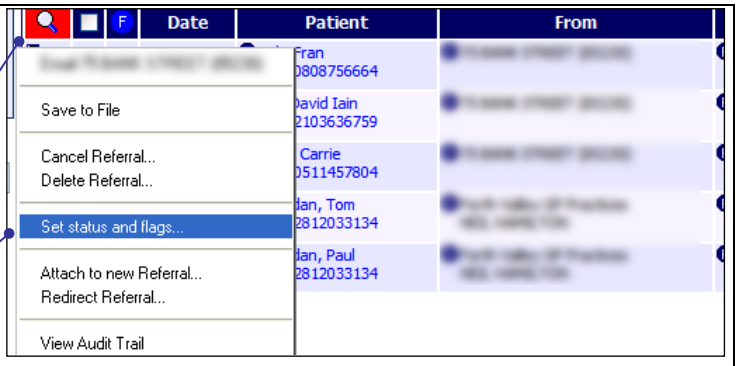
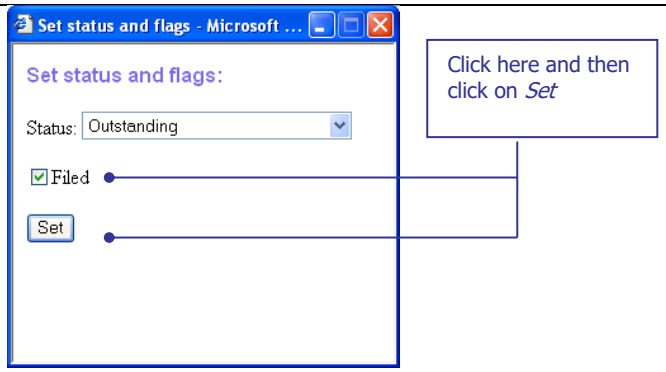
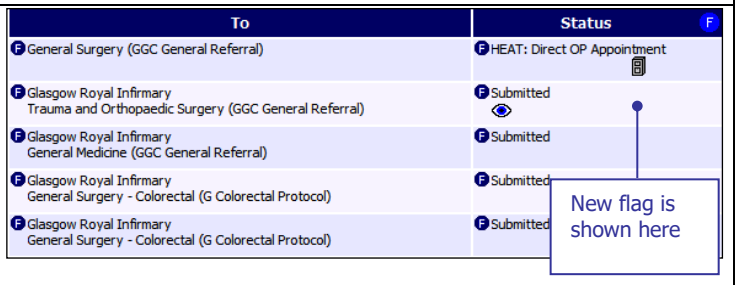
Name	Icon	Icon – not set	How is it set?	What can it be used for?
Printed			Set automatically when printing a copy of the message. It is only visible to the location at which it was printed	If you want to ensure all messages have been printed for checking or filing, you can filter the worklist to show messages that have not been printed
Filed			Set manually by clicking on 'Set status and flags…' (see page 5-13)	If you use this flag to note that a copy of the message has been filed, you can filter the worklist to show those referrals that have yet to be filed.
Viewed			Set automatically when a location views, prints or changes the status of a received message	You can filter the Message Worklist to show messages that have been submitted but not Viewed by the receiving location and take appropriate action if necessary
Sent	No icon	No icon	Set automatically when a message is submitted	If you use more than one status for In Progress messages to manage the workflow of messages, you can use the Sent flag to filter the worklist to show all messages not yet submitted

Note: You can use any of the flags described above to filter the message worklist.

The not set icons will only be displayed in the worklist when you open your new message worklist or when you apply the 'Not Set' options when filtering on status and flags on the Status column.

Flagging a Message as Filed

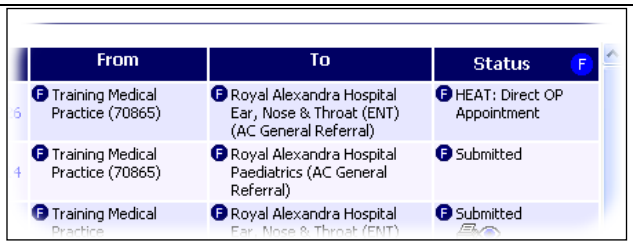
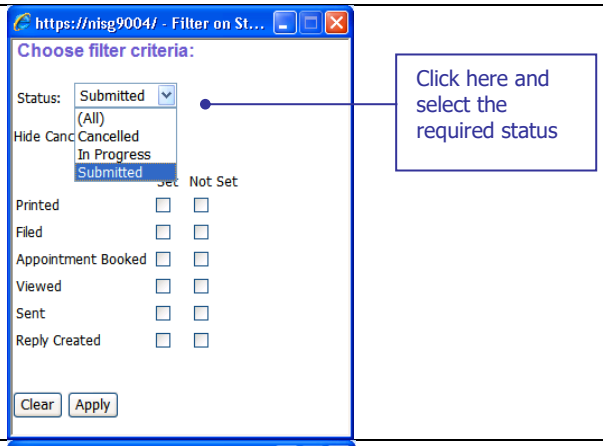
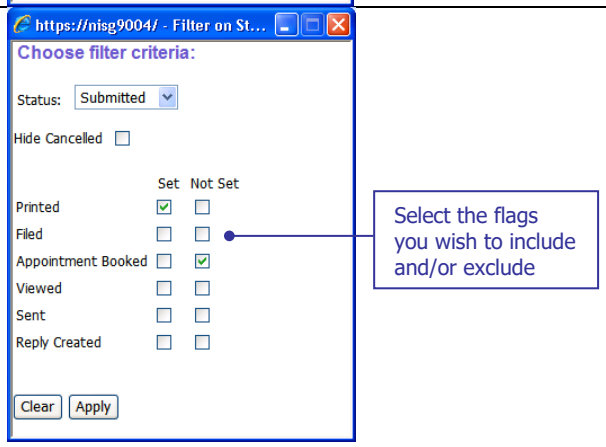
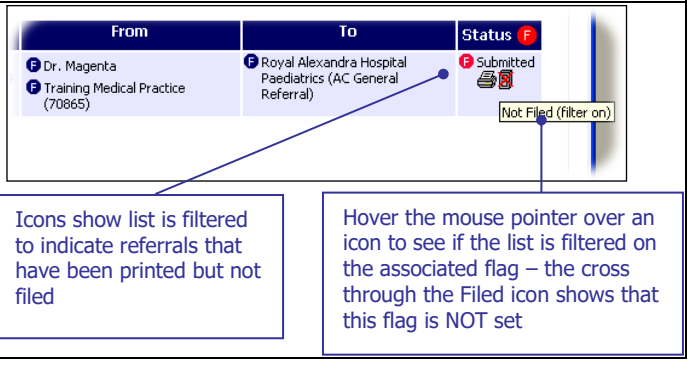
The only flag a location can manually apply themselves is **"Filed"** . For example you may want to use this flag to record the fact that you have included a copy of the message in the patient's notes.

1	Click on the Context Menu next to the message you wish to attach a flag of Filed to and select Set status and flags…	
2	Enter a tick in the Filed tick box and then click on Set	
3	The screen will refresh and the message will be displayed in the Referral Worklist with the new flag	

Note: If required, you can repeat the above process un-checking the tick box to remove the Filed flag from a message.

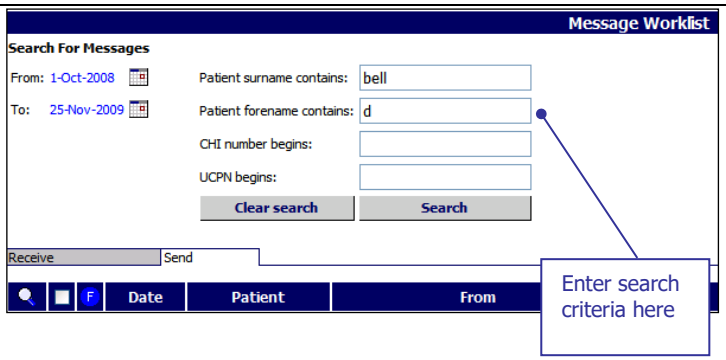
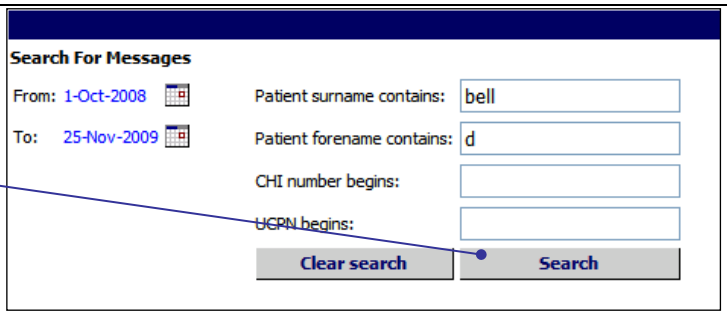
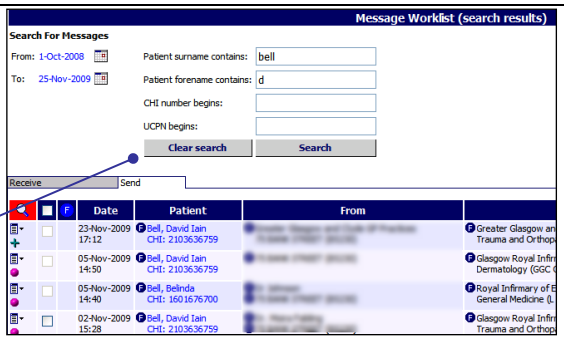
Filtering The Message Worklist On Status And Flags

As well as filtering directly by clicking on the icons, you can filter the Message Worklist using a combination of Statuses and Flags.

1	Click on the Filter (F) icon in the Status column header	
2	In the Filter on Status and Flags window, select the Status you wish to filter on from the drop down list **Note:** The Status drop down list will only show statuses that appear in the Message Worklist	
3	Select which flags you wish to include and which you wish to exclude. In the example given, only referrals that have been printed but have not yet had an appointment booked will be returned. **Note:** The Hide Cancelled tick box can be used to exclude Referrals with a status of Cancelled	
4	The red icon in the Status column header shows that the Referral Worklist has been filtered on Status and Flags. The icons underneath the status show which flags are Set and which are Not set	

Searching The Message Worklist

CCG has a search function that allows you to search the Message Worklist by patient name, date range, CHI number and UCPN.

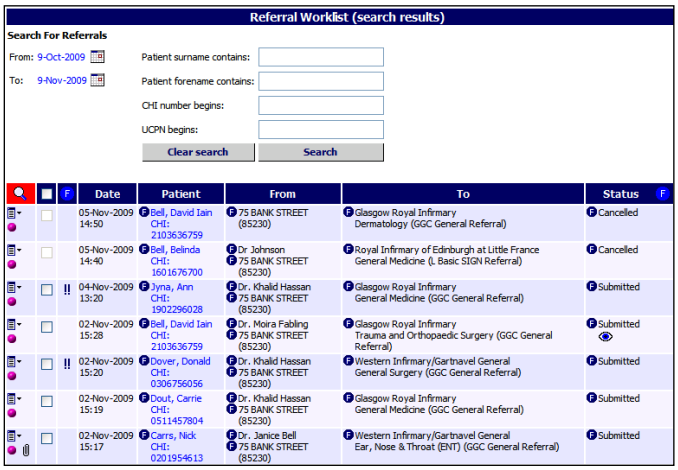
1	In the Message Worklist, click on the Search icon 	
2	In the search area, enter a date range and/or patient details **Note:** The default date range is all dates up to today's date – you can change the From and/or To date by clicking on the calendar icon 	
3	Click on the Search button to begin searching the worklist 	
4	Search results are displayed – to return to the full worklist, click on the Clear Search button 	

Note: When you click on Search the system will search the entire Message Worklist. If you have filtered the Message Worklist prior to starting the search, then the search results will also have the filters applied – click on the Clear Filters button to see all search results.

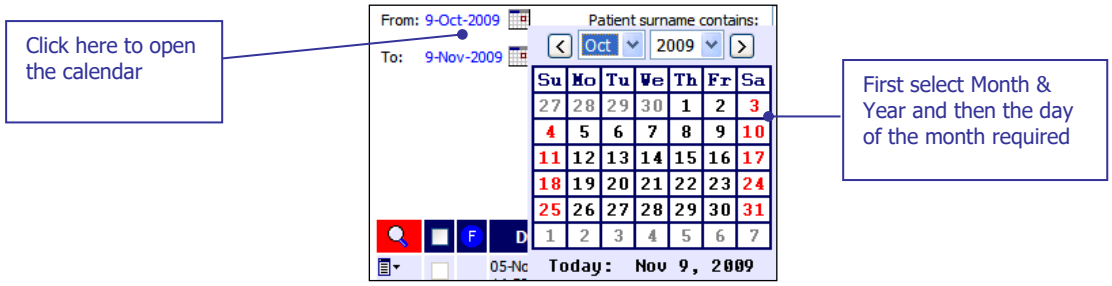
Using The Restricted Search Function

When you open a message worklist which shows old as well as new messages, the search function is displayed by default. In the home page point to Messages and then click on the option required:

The worklist is displayed showing messages for one month previous to the current date with the date range set in the search facility. To search for a patient, key in the patient's name and/or CHI and click on Search.



To search for a patient outside of the set date range click on the calendar icons and reset the date:

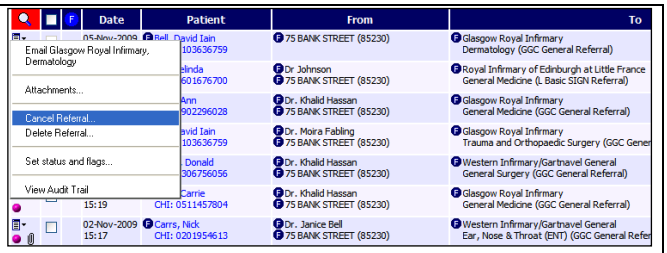


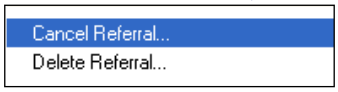
Once you have selected an appropriate date range click on Search to display the results.

Cancelling And Deleting Messages

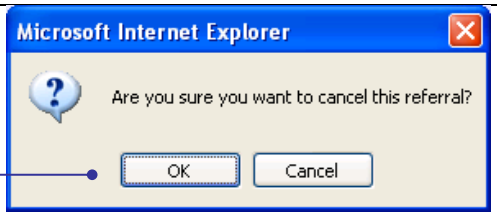
From time to time you may find it necessary to cancel or delete a message from the worklist. Follow the steps below to cancel or delete a message – in this example a referral.

1 Click on the Context Menu and select Cancel Referral… or Delete Referral… as required (see below)
Note: The menu option will denote the message type selected in this instance referral

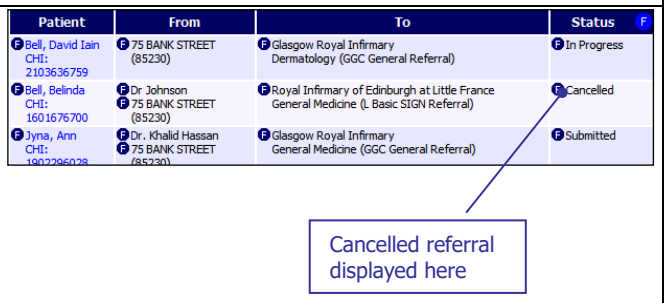




2 Click OK to continue or Cancel to abandon cancelling or deleting the referral



3 If the message was cancelled, it will remain on the worklist with a status of Cancelled. If it was deleted, it will no longer be on the worklist and cannot be retrieved



Cancel

This option changes the status of the message to Cancelled. The message will remain on the worklist and can be accessed at any time.

Delete

This option ends the message and removes it from the worklist. You cannot access a deleted message, although details of all activity relating to it can still be viewed in the Audit Trail

Once a message has been submitted only the receiver can cancel or delete. All messages can be cancelled or deleted by the creator prior to being submitted.

Other Message Options

When you click on the Context Menu  a number of message options is offered to help you manage your messages.

Email

This option is not applicable at this time.

Upload Attachment

You can attach files to a message by clicking on the Context Menu  and selecting **Attachments**… from the menu. You will then have to navigate to the required file.

Set status and flags

You can change the status of a message, or attach a flag of Filed to a message, by clicking on the Context Menu  and selecting **Set status and flags…** from the menu.

6. Other CCG Functions

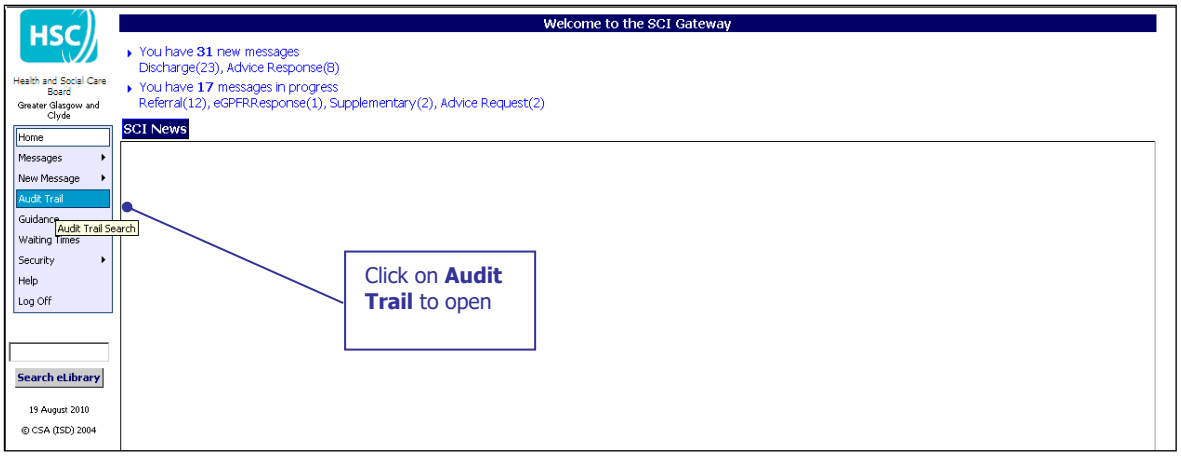
CCG provides access to some other functions which you may find useful when using the application.

This section covers:

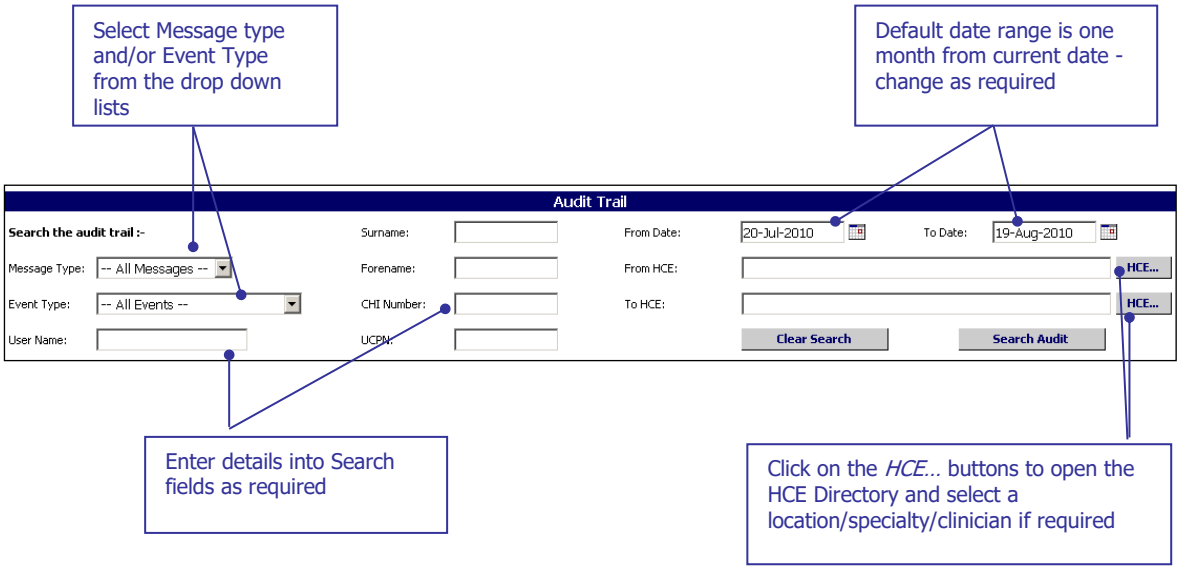
- The Audit Trail
- On-Line Help File
- Archiving

The Audit Trail

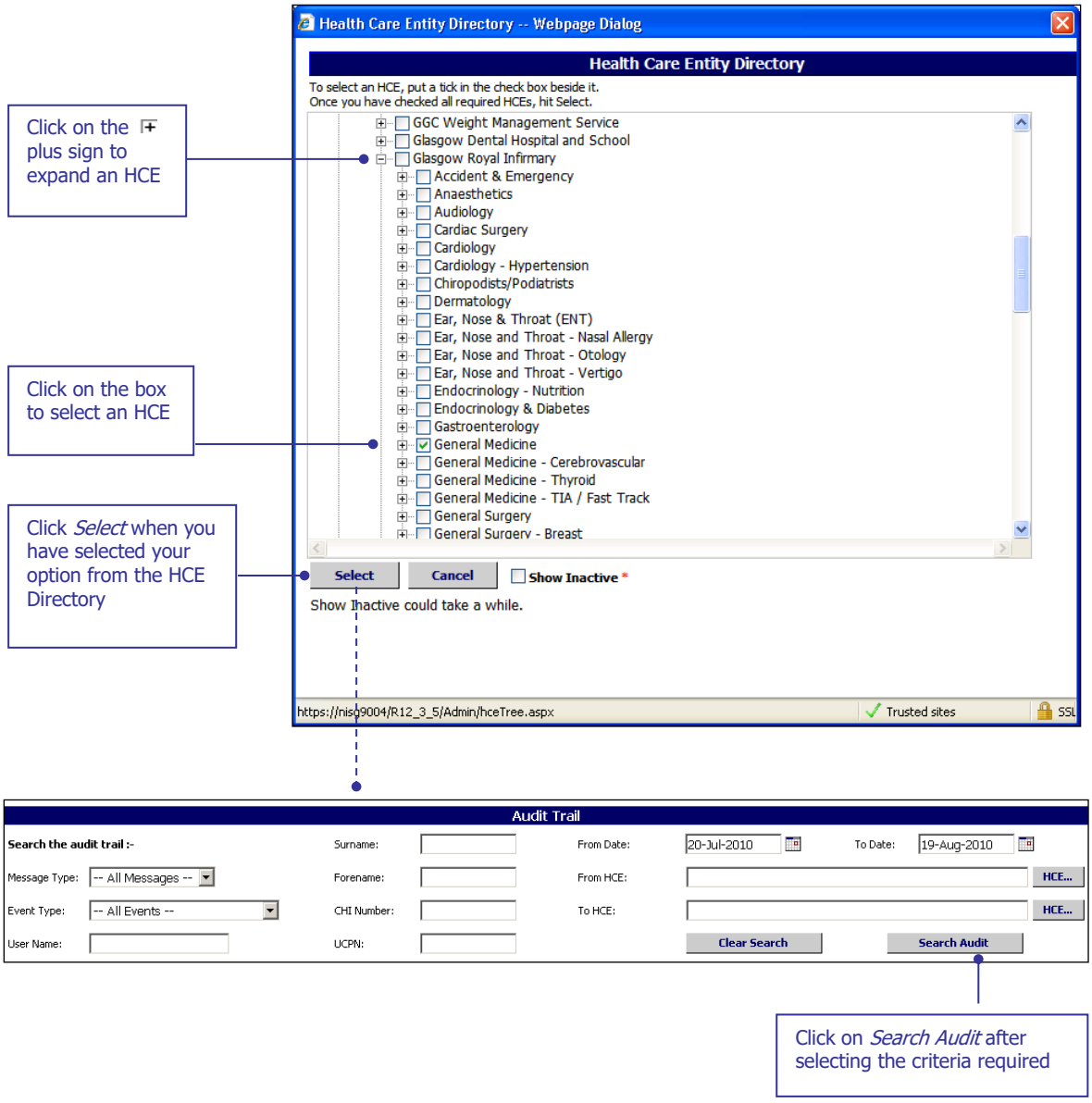
The Audit Trail allows users to view historical information regarding messages sent through CCG and uses similar search options to those available when using the search function in the message worklists.



The Audit Trail search function is displayed with a default date range of one month as you would see in a worklist.



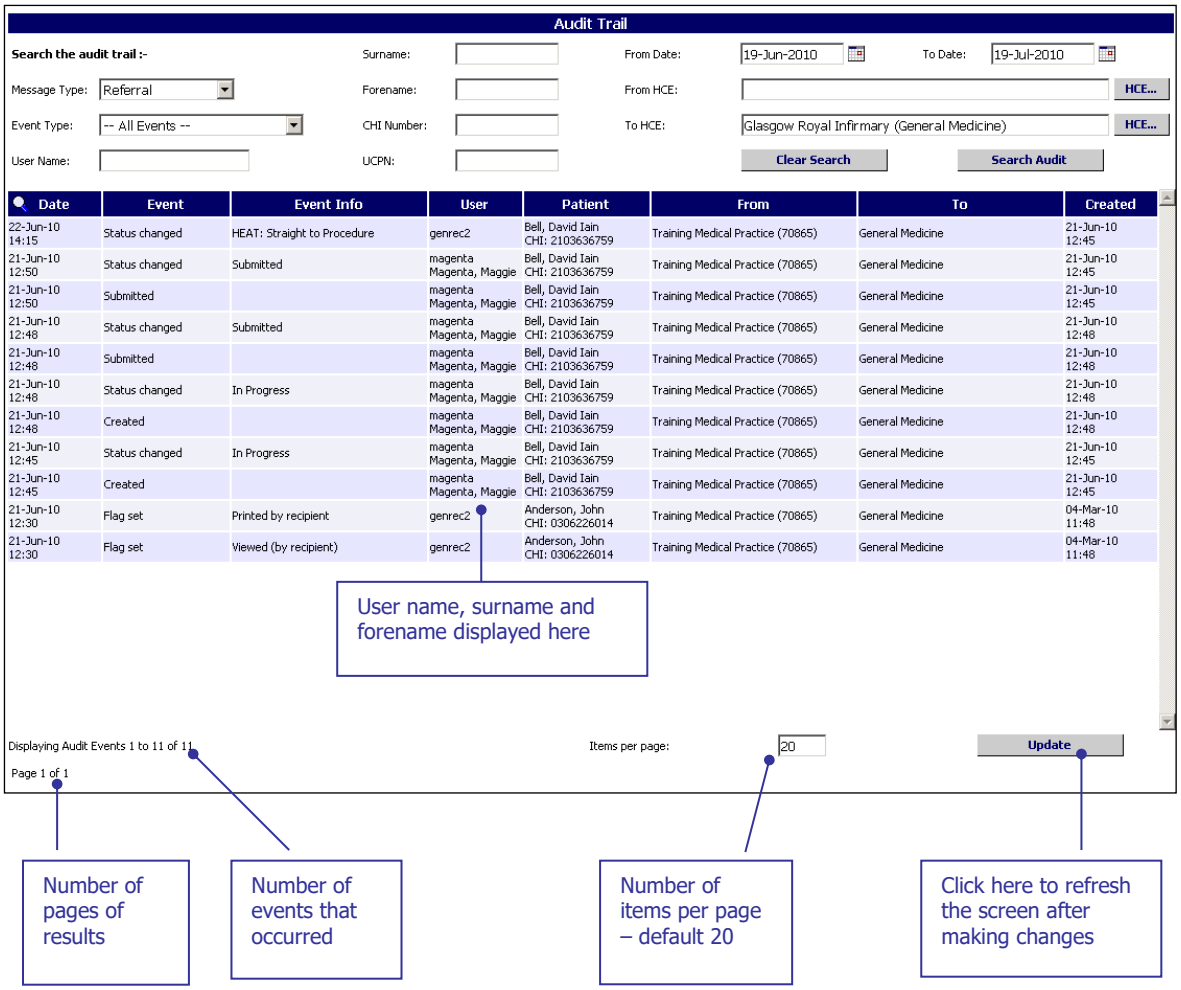
Pictured below is the HCE Directory window which is displayed when you click on the HCE… button as described on the previous page.



When searching on the From HCE… and To HCE…you can only have one HCE in each of the HCE… fields. For example you can search for Referrals sent from one Dental practice to one Specialty at a hospital.

If you select a hospital name you may not get any results returned and the message pictured below would be displayed. Messages are generally sent directly to Specialties or Consultants on CCG rather than the actual hospital.

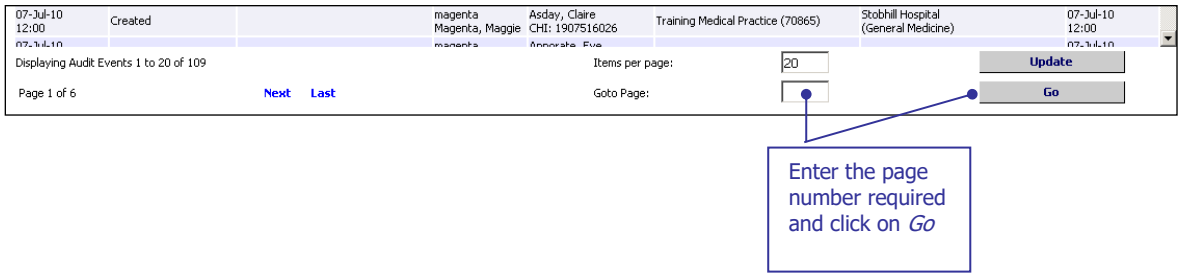
Pictured below is the result of the search carried out in the example on the previous page:



In order to improve management and identification on CCG, users will have additional demographic information recorded against their user account. This allows the Audit Trail to display more information.

When a search is run on the Audit Trail, the results will display the first name and surname as well as the user name of the relevant users.

If you have more than one page of search results the bottom of the audit screen will look as below:



Note: The Results are displayed in date and time order like the worklist.

The update button can be used if you change the number of items per page or make a change to the search criteria.

Clicking on the magnifying glass  icon will close the search criteria window but the results of your search will remain displayed on the page.

Clicking on the Clear Search button will clear all search criteria and the results from your search but leave the window open.

To search on a date range of one specific day the From and To dates should have the same date.

Audit Trail Search Criteria

Message Type

Allows you to search by message type, for example Referral, Advice Request etc.

Event Type

Allows you to search by different actions that have taken place when creating, sending and managing a message.

Attached to message	A submitted message was attached to a new message using the 'Attach to new' option. The audit record is for the original submitted message e.g. an original referral was attached to a new tertiary referral
Created	A message was created
File attached	A file was attached to a message
File Unattached	A file was unattached from a message
Flag set	A flag was set on a message e.g. Filed icon
Flag unset	A flag was unset from a message e.g. Filed icon
Message attached	A submitted message was attached to a new message using the 'Attach to new' option. The audit record is for the new message e.g. an original referral was attached to new tertiary referral
Message attachment attached	A submitted message that had an attachment was attached to a new message using the 'Attach to new' option e.g. a referral with an attachment was attached to a new tertiary referral. If the original referral has more than one attachment there will be an audit record for each attachment
Redirected	A message was redirected to another healthcare provider
Status change	The status of a message was changed
Submitted	A message was submitted

User Name

Allows you to search for actions carried out by a specific user.

UCPN

Allows you to search by the UCPN - the patient's referral Unique Care Pathway Number.

Health Care Number

Allows you to search by the patient's Health Care Number.

Forename

Allows you to search by the patient's first name.

Surname

Allows you to search by the patient's last name.

From Date - To Date

Allows you to search through a date range. If you choose All Messages the date range is restricted to one day. The following message will be displayed if you attempt a search on a longer date range.

From HCE... to HCE...

Allows you to search for the location or clinician that sent or received a message. Clicking on the button will display the HCE director