

## Letters Training Course Overview (Remote)

The CRIS Letters Training Course has been developed to enable customers to make modifications to their own CRIS Appointments Letters, and develop the skills required to introduce new Letter Formats such as alternative Prep Letters, Conditional Letters, Information Sheets and Questionnaires.

The course utilises a practical approach and is designed to enable delegates to acquire the knowledge and skills required to successfully maintain CRIS Appointment Letters, negating the need to request quotes for letter amendments or log calls with the CRIS helpdesk.

### Course Notes / Guidance

- **COURSE DURATION & DELIVERY** - This course is currently only available remotely using MS Teams or GoToMeeting but will be undertaken using the customers own Training System and delegates will have the opportunity to undertake practical, hands-on exercises via 3 x ½ Day sessions.
- **KNOWING WHAT TO EXPECT** - Magentus Software envisage that undertaking CRIS Letters courses will enable the Trust to take control of maintaining their own basic Appointment Letters and Information Sheets. This should prove beneficial from a practical and financial perspective in enabling the Trust to make changes to Preparation Letters, Info Sheets and Departmental Directions, as well as to introduce new patient documentation without cost implications associated with requesting these changes via the CRIS Helpdesk.
- **This course is not designed to demonstrate CRIS Label or Report Formats** as typically these formats do not require amendments following the first few weeks of go-live, and the maintenance of these formats is much more complicated than Letter formats.
- **Magentus Software do not therefore recommend that the Trust make amendments to this area of the system.** Based on experience, if errors are made in these areas, it has a much more significant impact on departmental working practice as unlike Letter formats which can be temporarily generated via third party word-processing systems, there is no workaround for the creation of Labels and Reports. Additionally, in the event of mistakes, corrections may need to be made by the CRIS Helpdesk and are unlikely to be covered by the standard maintenance contract.
- **MAXIMUM NO. OF DELEGATES PER SESSION** - CRIS Letters training will be delivered remotely using MS Teams to a **maximum of 4 delegates**.
- **CHOOSING DELEGATES FOR LETTERS TRAINING** - CRIS Letter formats utilises a certain amount of simple programming clauses and although this can be mastered by any user given the appropriate amount of individual consolidation and practice, Magentus Software would recommend that anyone attending this course has reasonably high levels of computer literacy. Delegates would also benefit from some experience of conditional programming statements (If, Else etc.) although this is not essential to attending the course.
- **RADIOLOGY & CRIS SYSTEM KNOWLEDGE** - Due to the specialised nature of this training, anyone attending the course must have practical experience of current Radiological Guidelines and Working Practice. Prospective delegates must also be proficient CRIS System Users, with an understanding of adding requests, maintaining waiting lists and making, changing and cancelling appointments via CRIS.

- Delegates attending this course would also benefit from a good familiarisation with CRIS System Management Tables, to better understand the configuration which contributes to CRIS Appointments and Letters, and thereby enable them to go on to create and maintain associated documentation.

**\*\*\*IMPORTANT PLEASE NOTE\*\*\***

Delegates who have no previous CRIS or Radiology based experience WILL NOT BE ELIGIBLE to attend this course and Magentus Software reserve the right to refuse attendance to anyone who does not meet this pre-requisite.

## Training Pre-Requisites / Actions

- Provide names & roles of all delegates attending the session
- Ensure all delegates can access MS Teams
- Ensure all delegates have their local CRIS training system installed
- Download & print hard copies of all associated course documentation.

**\*\*\*IMPORTANT PLEASE NOTE\*\*\***

Once Magentus Software and the Trust have formally agreed on the date of CRIS training course, the Trust will be liable for the whole fee / equivalent training days unless we receive written notification of cancellation.

For bookings cancelled two or more weeks before a course is due to start, 100% per cent of course fees paid will be refunded to the applicant.

No refund will be made for bookings cancelled less than two weeks before the event, except in exceptional circumstances and then only at the discretion of the Training Manager.

Magentus Software also reserve the right to cancel and charge for any training where the Trust does not formally confirm that the above actions have been undertaken by the training deadline, or in the event it transpires that despite formal confirmation the set-up is not as required upon commencing the session.

## CRIS Letters Training – Course Overview

### PART I: Letters Configuration Tables – ½ Day

The concept for 'Day One' Letter Training is that a 'new' hospital is opening within the Trust with new Departments which will require Appointment Letters with Directions, and associated Examination Preparations.

This exercise is designed to introduce the following principals:

- Making use of the CRIS 'Format Tool' to 'Back-up' or 'Restore' Letter formats.
- Overview of all Tables used to Facilitate Letter Creation and Letterhead Naming Conventions – i.e. Trusts, Sites, Referral Sources, Referral Locations, Departments, Rooms, Exams Per Hospital, Examination Codes and Print Content Editor.
- Basic Amendments to Hospital 'Directions' to include details of new parking costs.

### PART II: Letter Composition – ½ Day

During this session we will build on the concepts undertaken during Day One Training covering the following:

- Basic Amendments to Examination Prep – in this example adding a General Ultrasound Letter.
- Basic Amendments to 'Departments Table' due to a Change in Telephone Number/Appointment Clerk
- Streamlining Letter Content and increasing content clarity through the use of supplementary 'Info Sheets'.
- Further Streamlining exercise to create MRI General Information, leading onto creating an MRI Questionnaire and Info Sheet during the second day.
- How to utilise 'Conditional Prep' in this example for 'Children Under a Specific Age' – Child 2-5 years old = A cup of water, Child Under 2 = Half a cup.
- Using the optional 'Letter' field to create alternative Letters – in this example how to create an 'Exam Specific' Letter for an 'Ultrasound Fast & Full Bladder'.
- Alternative LMP text – in this example creating text to use the 28-day rule, in addition to the standard text for the 10 Day rule.
- How to utilise 'Pronouns' in CRIS Letters (You/He/She rather than 'The Patient').

### PART III: Advanced Conditional Prep and Content – ½ Day

- Use of AM & PM Preparation – in this example how to add a letter for a Barium Meal Prep with differing AM and PM instructions for adults and children.
- Use of alternative 'In Patient' Preparation Letters – in the example an 'In Patient Barium Meal'.
- Overview of the CRIS Status Codes and 'Status Codes' table to enable the Trust to create letters specific to individual statuses rather than the overall category – i.e. Request, Waiting, Cancelled vs. Request Rejected, Waiting – Partial Booking 1, Cancelled etc.
- How to create a site-specific Letter associated with particular 'Status' codes using two exercises:
  - How to add a letter to the cancellation status 'CPDNA – DNA Card Returned Status' to enable sites to print the same letter for Auto DNAs, and vetted DNA's.
  - How to add site specific letter for use with the 'Partial Booking Letter' to advise the patient that we have tried to contact them by phone, and they should now contact us. This is for use with a new status 'Telephoned' recommended for use in 'Direct Booking' situations.
  - How to add specific letters for Rejected or Cancellations status codes.
- How to create a Questionnaire to send out with the Appointment Letter – in this example we will introduce an MRI questionnaire.
- We will also look at the inclusion of Images within letters to enable Maps to be incorporated into directions information where applicable.

## Document Control

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Change History			
Issue	Date	Author	Details of Change
V1.0	05/04/2021	Emma Savage-Mady	First Issue
V1.1	30/04/2021	Emma Savage-Mady	Amendments based on course delivery and lessons learnt.
V2.0	07/03/2022	Emma Savage-Mady	Amendments based on new pricing model for a maximum of 4 delegates.
D3.0	21/12/2023	Christine Anthony	Rebranded to Magentus.
V3.0	22/12/2023	Suzie Landgrebe	Review
Reviewed by			Date
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Review Date			