Healthcare
Software | Solutions

The Radiology Information Solution

Sessions Module

Meeting Management & Bespoke Reporting Worklists

For more details please contact:
e: sales@hssnet.com
t: 01623 489825
HSS, 3rd Floor, i2 Mansfield, Hamilton Court
Oakham Business Park, Mansfield, NG18 5FB

HSS is part of the
Wellbeing Software Group

Copyright

© Healthcare Software Solutions 2014

Registered Office: 3rd Floor i2 Mansfield, Hamilton Court, Oakham Business Park, Mansfield, NG18 5FB

These materials are or comprise restricted and proprietary confidential information of Healthcare Software Solutions. Disclosure to or use by the recipient shall not convey any intellectual property rights in these materials. The right to use these materials by the recipient is subject to restrictions and limitations contained in the Provision of Integrated Care Record System and Associated Services Agreement and related agreements.

Confidentiality

All information in this document is provided in confidence for the sole purpose of adjudication of the document and shall not be used for any other purpose and shall not be published or disclosed wholly or in part to any other party without HSS prior permission in writing and shall be held in safe custody. These obligations shall not apply to information which is published or becomes known legitimately from some source other than HSS. Many of the product, service and company names referred to in this document are trademarks or registered trademarks. They are all hereby acknowledged.

Table of Contents

Introduction 4
Sessions Module 5
Creating Meetings 5
Adding People / Participants 6
Adding Events / Patient Records 7
METHOD ONE: ASSIGNING INDIVIDUAL EVENTS / PATIENT RECORDS 7
ADDING EVENTS FROM CRIS WORKLISTS 7
ADDING EVENTS / PATIENT RECORDS VIA CRIS MODULES 8
METHOD TWO: POPULATING A SESSION USING CRIS STATISTICAL REPORTS 8
Assigning Checklist Actions – To be completed ahead of the Session / Meeting 10
Undertaking the Session / Meeting 11
STARTING A SESSION / MEETING 11
REVIEWING EVENTS / PATIENT RECORDS 12
OUTCOME ACTIONS – To be completed following the Session / Meeting 13
MARKING EVENTS / PATIENT RECORDS AS COMPLETED 14
Editing / Administrating Session Lists – Remove, Copy and Move events / patient records 14
Checklist Actions and Outcome Actions Tabs 16
CHECKLIST ACTIONS – Required prior to the Session / Meeting 16
TO COMPLETE A CHECKLIST ACTION 17
OUTCOME ACTIONS – RESULTING FROM THE SESSION / MEETING 17
Viewing Events assigned to Sessions via Event Details 18
The [Sessions] Worklist via CRIS Main Menu screen 18
Sessions Module System Access 19
CRIS LICENSES 19
XR SETTINGS 19
SECURITY SETTINGS 19
Session Module Table Configuration 20
ASSIGNING MEETING PARTCIPANTS AND ADMINSTRATIVE USERS 20
CREATING MEETING VENUES 21
DEFAULT MEETING TYPES 21
CREATING SUB MEETING TYPES 22
DEFINING CHECKLIST AND OUTCOME ACTIONS 23

Introduction

Purpose

The session's module has been designed to facilitate meetings and is specifically tailored for Radiology. Meetings can be anything from **M**ulti-**D**isciplinary **T**eam Meetings to Teaching Lists, and 'Bespoke' reporting worklists. All CRIS 'Events' can be added to an active session, events can also be populated using CRIS Statistical reporting functionality. Comments and actions can be added to individual events, or to the overall meeting. Once a meeting has started CRIS reports and dictations are accessible from within the module and when using a PACS workstation images can also be loaded and discussed during the meeting.

Audience

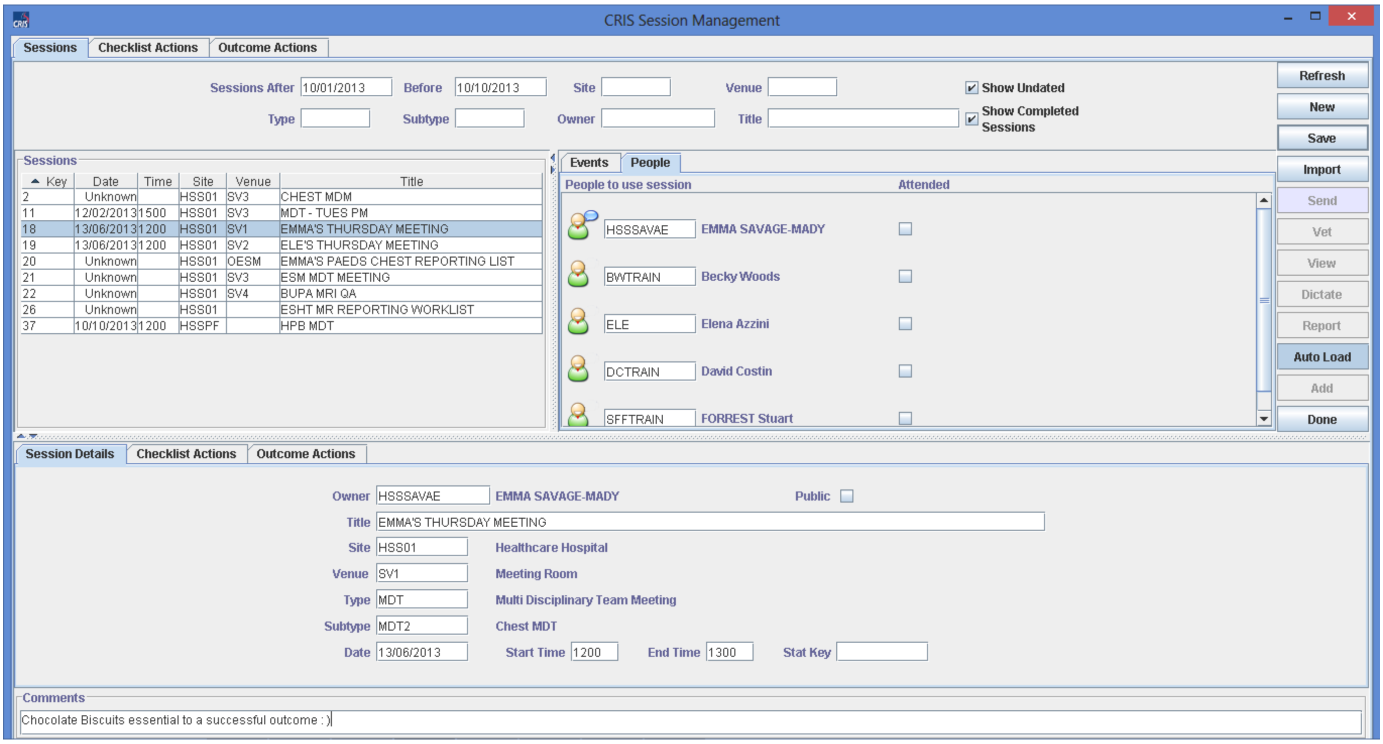
This document has been designed to inform users on how to create sessions, add users, and record notes and actions. The final section covers configuration of the module aimed at RIS / PACS System Managers.

Sessions Module

DICTATION or REPORTING mode is typically the most appropriate mode for use with the Sessions module, although clerical users can continue to use their own preferred mode for administration purposes.

Creating Meetings

1. To create meetings load the **SESSIONS MODULE** by selecting the Sessions icon from the main menu.



2. Once loaded, select the **[New]** function button from the top right hand side of the screen.

3. Complete the 'Session Details' fields at the bottom of the screen as follows:

Field	Description
Owner	Person who created / who is responsible for organising the meeting. This is automatically populated based on the current user or can be amended if applicable. Coded field - Press [F4] for a prompt list.
Public	If left unchecked / un ticked this session will be private and only visible to meeting participants, when checked / ticked the list is visible to anyone accessing the Sessions Module.
Title	Free text field using to enter the 'Title' of the meeting. Please note: HSS would recommend prefixing titles with relevant details such as CHEST_MDT – Weekly Meeting, or C12345_PAEDS – Reporting Worklist to facilitate column re-ordering and sorting of more extensive lists showing all available Sessions.
Site	Hospital where the meeting will be held. Coded field - Press [F4] for a prompt list or leave blank for cross-site reporting.
Venue	Location of the meeting (Conference / Seminar room). Coded field - Press [F4] for a prompt list.

Type	Used to specify the 'Meeting Type' – i.e. Parent category such as MDT, Teaching etc. Coded field - Press [F4] for a prompt list.
Subtype	Used to further define the type of meeting being held – i.e. Child Category such as Chest, Breast , Paediatric, MSK etc. Coded field - Press [F4] for a prompt list.
Date	Date the meeting will take place or can be left blank for on-going meetings or reporting worklists.
Start time	Time the meeting will begin if required or leave blank.
End time	Expected time the meeting will conclude if required or leave blank.
Stat Key	This function allows users to link a Statistical Report to a meeting. This will then be primarily used to populate the session, although individual events can also be added manually in addition to the auto generated list. This is particularly useful for 'Bespoke' reporting worklists where the filter options via the 'Report Info List' are not specialised enough – i.e. Paediatric Chests. Press [F4] to display a list of all available Statistical reports.
Comments	Any relevant comments / details which are appropriate to the meeting can be entered here – i.e. AED MSK – Reporting Worklist – Reporting group includes Emma Savage-Mady, Elena Azzini, Stuart Forrest etc.

4. Having completed the 'Session Details' move on to inviting 'People' to attend / access the meeting.

Adding People / Participants

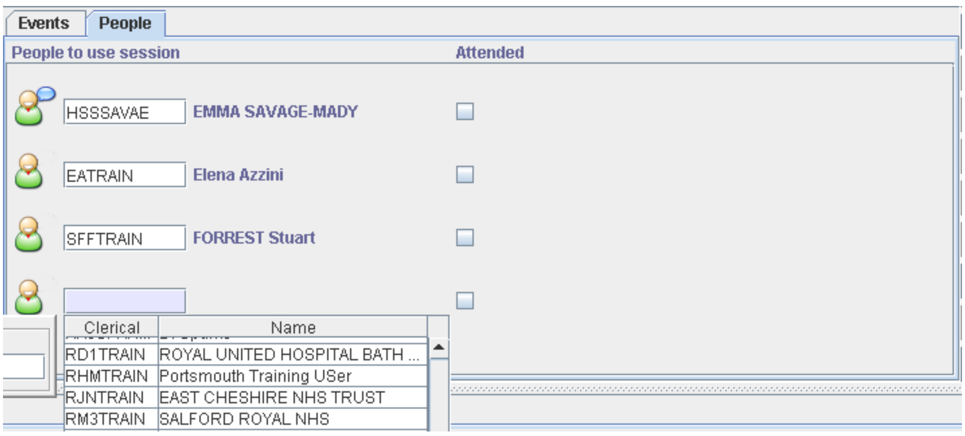
Only the 'Chairperson' / 'Creator' of the session can add participants to private sessions. Any user can add themselves to public sessions.

Private Sessions can only be amended by 'People' already assigned to the meeting / reporting worklist.

Meeting Participants can be added at any time prior to, or during the meeting. An 'Attended' checkbox is also provided to record which of the assigned delegates attended the meeting.

5. To add meeting participants click on the 'People' tab.

6. The creator of the session will be automatically assigned to the 'People' or can be amended as applicable. Additional Participants can be added by pressing [Enter] after the 1st participant to create a new blank field and entering the code for the person or pressing [F4] for a prompt list.



Adding Events / Patient Records

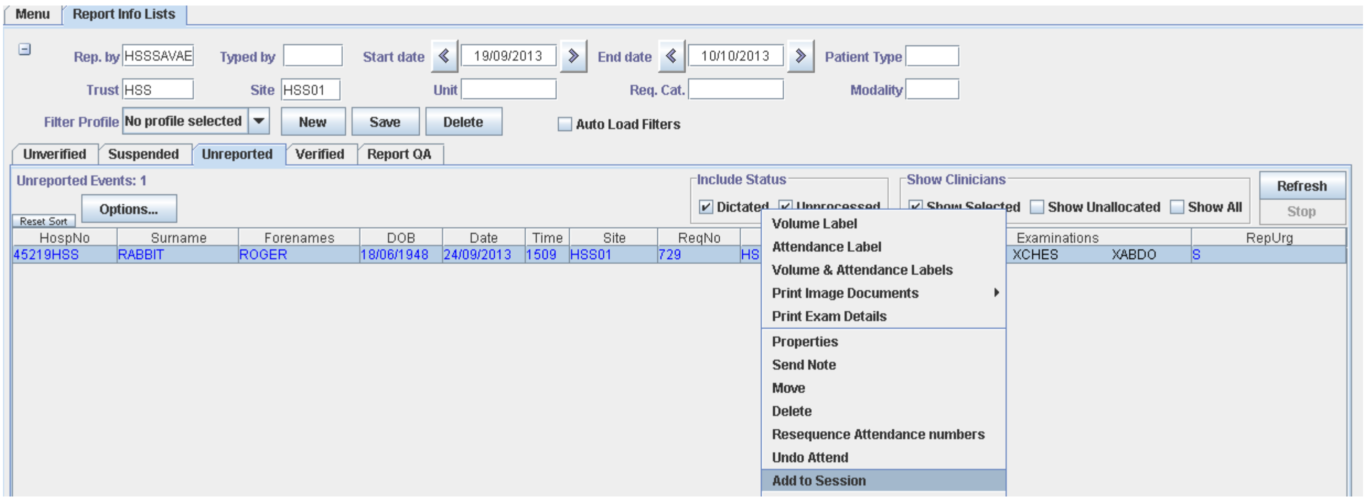
There are two methods of **ADDING EVENTS / PATIENT RECORDS** to a Session:

METHOD ONE: ASSIGNING INDIVIDUAL EVENTS / PATIENT RECORDS

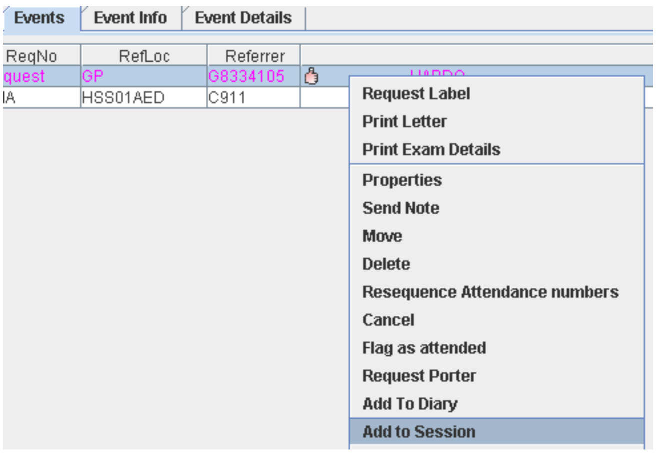
Events / Patient Records can be added to a Session in most key screens / modules and right-click menus via the CRIS system.

ADDING EVENTS FROM CRIS WORKLISTS

An event can be added to a Session from the following CRIS Worklists – [Daylist], [Unprocessed], [Appointments], [Report Info List], [Waiting List], [Orders], [Request List] and [Vetting List]. To do this highlighting the relevant event, right-click and select 'Add to Session' from the resulting menu.



You can also select 'Add to Session' via the right click menu on the Patient's 'Events' list.

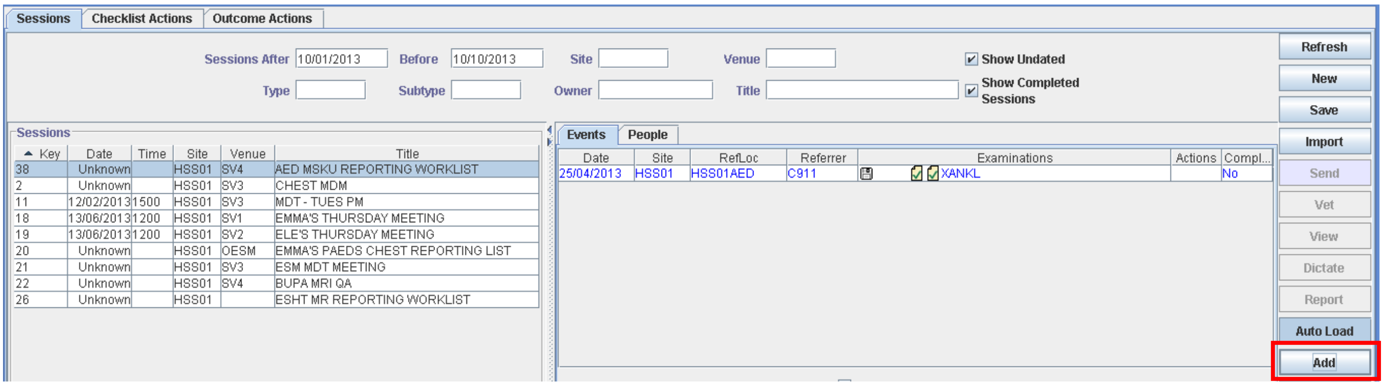


ADDING EVENTS / PATIENT RECORDS VIA CRIS MODULES

The **Add to Session** function button is also available via the following CRIS Module Screens:

- EVENT DETAILS
- POST PROCESSING
- DICTATION SCREEN
- REPORT EDITOR
- BATCH VERIFY

Once you have selected **'ADD TO SESSION'** the **SESSIONS MODULE SCREEN** will appear to enable you to specify which 'Session / Meeting' you wish to assign the event / patient record.

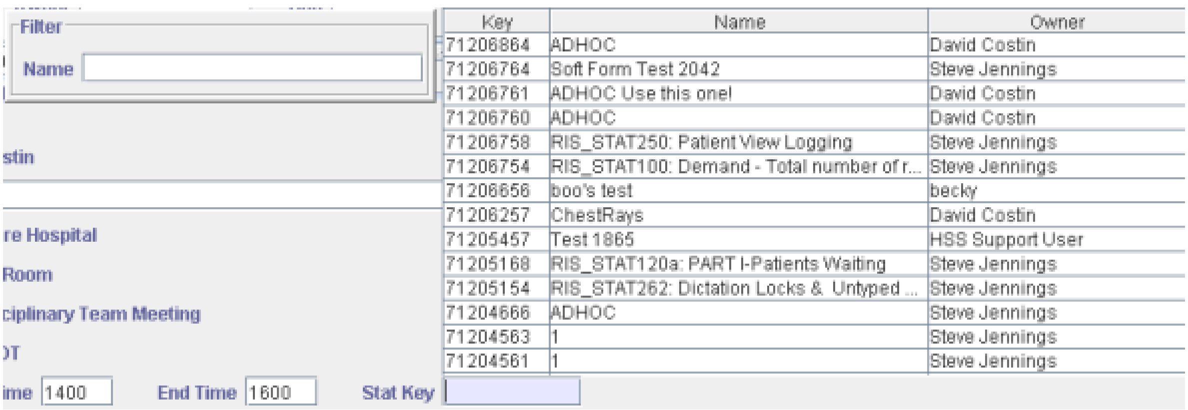


You should therefore highlight the appropriate Session / Meeting and click the [Add] function button on the right hand side of the screen.

Please note: If the Sessions Module screen does not appear automatically it may already be loaded / minimised in the background. You should therefore select it from the Taskbar as applicable before selecting [Add].

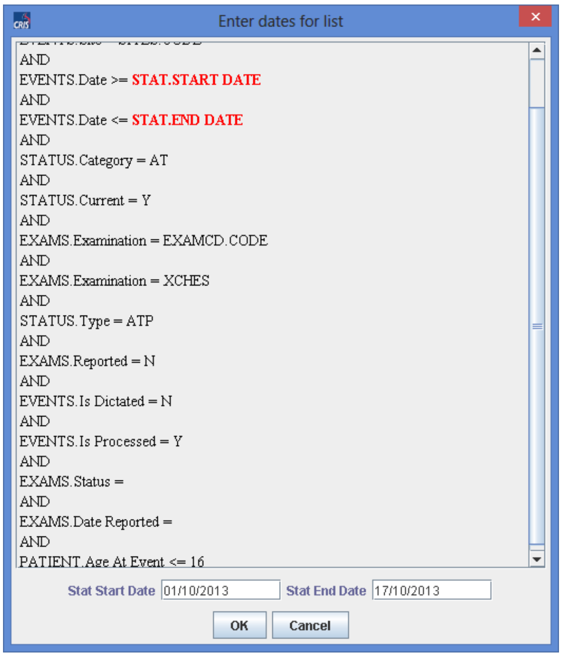
METHOD TWO: POPULATING A SESSION USING CRIS STATISTICAL REPORTS

It is also possible to populate a Session / Meeting using CRIS Statistical Reports – this is a particularly effective way to add events / patient records as once the report has been configured using the appropriate SELECTIONS (i.e. Exams, Patient Types, Patient Ages, Urgencies etc.) has been configured to pull back the relevant events / patients, users can select the appropriate report from the 'Stat Key' field.



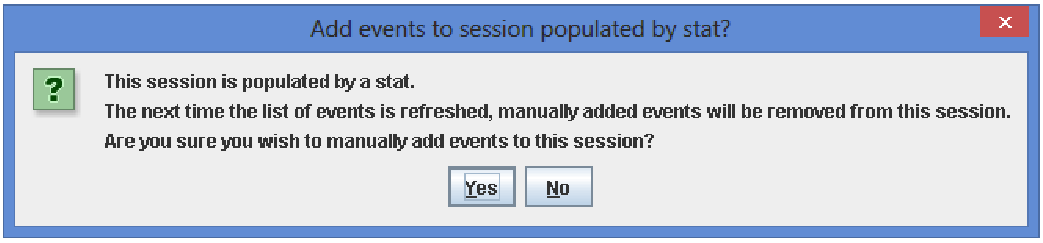
1. To do this you will need to link the relevant ‘Stat Key’ to the Session / Meeting by choosing this from the [F4] prompt list.

2. Once the appropriate Statistical Report has been linked to the Session / Meeting you should click the [List] function button located on the right hand side of the screen and enter the required date range via the below ‘Stat Start Date’ and ‘Stat End Date’ fields before clicking [OK] to populate the session.

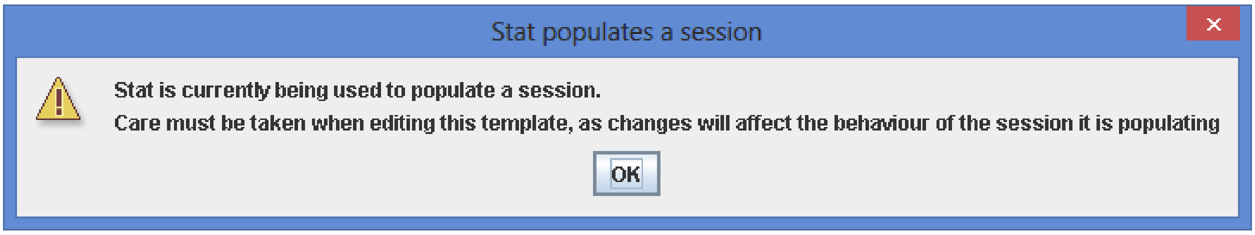


3. You can then work from the resulting ‘Events’ list as normal.

It is also possible to add **INDIVIDUAL EVENTS / PATIENT RECORDS TO SESSIONS** populated by a Statistical Report however you should add these events AFTER running the [List] function and upon doing so you will be presented with the following message:

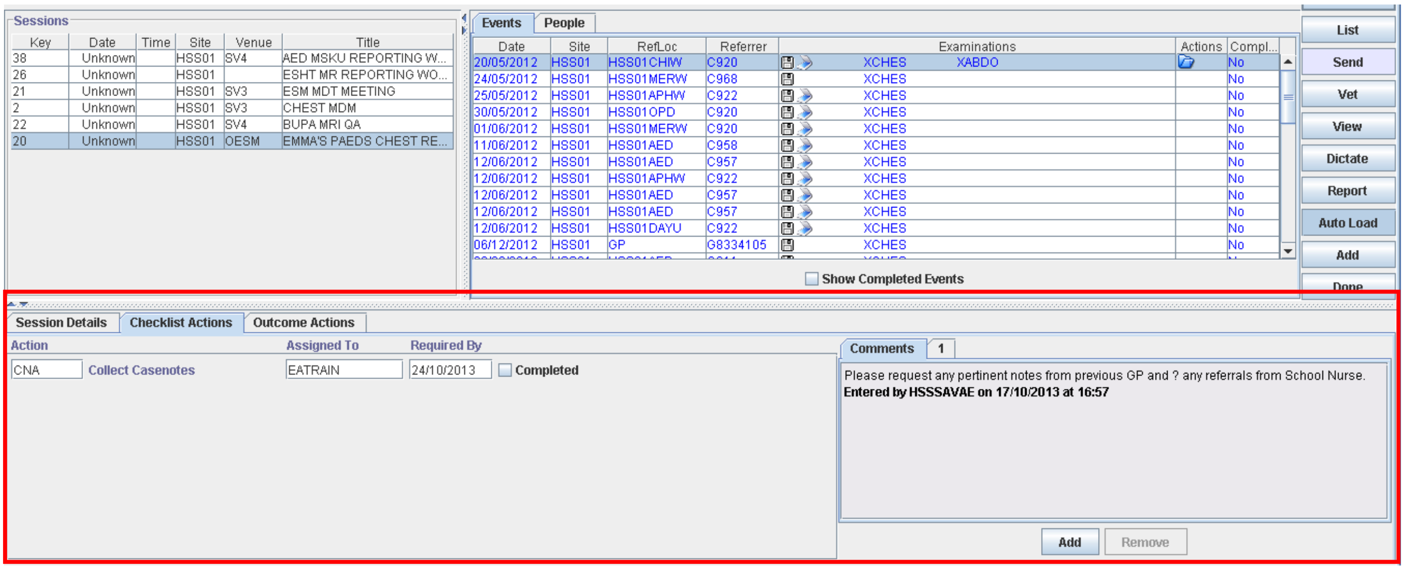


Reciprocally if anyone attempts to amend the source Statistical Report via the Statistical Reports module the user will be warned as follows:



Assigning Checklist Actions – To be completed ahead of the Session / Meeting

It is possible to assign **CHECKLIST ACTIONS** which need to be undertaken for all relevant patients ahead of a meeting taking place. These 'Action Categories' are defined during the set-up of the Sessions Module (See SYSTEM CONFIGURATION section) and are used to define any pre meeting activities (i.e. Request Case Notes, Digitise or Import Images etc).



1. To assign a **CHECKLIST ACTION** via an Event / Patient Record highlight the appropriate record and click on the **'Action'** field at the bottom of the screen.

Field	Description
Action	Press [F4] to select an Action Code from the prompt list, or type the code directly.
Assigned To	Use this field to specify the person responsible for completing the action via the using the [F4] prompt or by typing their code directly.
Required By	Enter a deadline date where possible as this enables other users to prioritise their outstanding actions. This this field can be left blank for on-going actions.
Completed	This box can be ticked by the person the action is assigned to indicate that the action is complete.
Comments	Click the [Add] button to assign comments against any action. These can be entered at any time by the person setting the action, the person completing the action or other people attending the meeting. All saved comments will be marked with details of the author in addition to date and time of entry. You can also choose to [Delete] comments at the time of entry but once saved comments remain on the record.

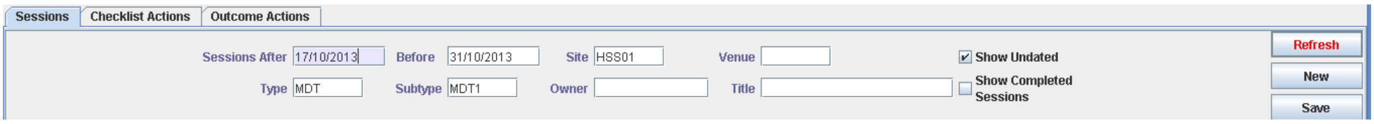
2. Click [Save] to complete the Action. This will display the following icon indicating an outstanding action against the event. 

Once 'Completed' the actions icon will be displayed as the following icon. 

Undertaking the Session / Meeting

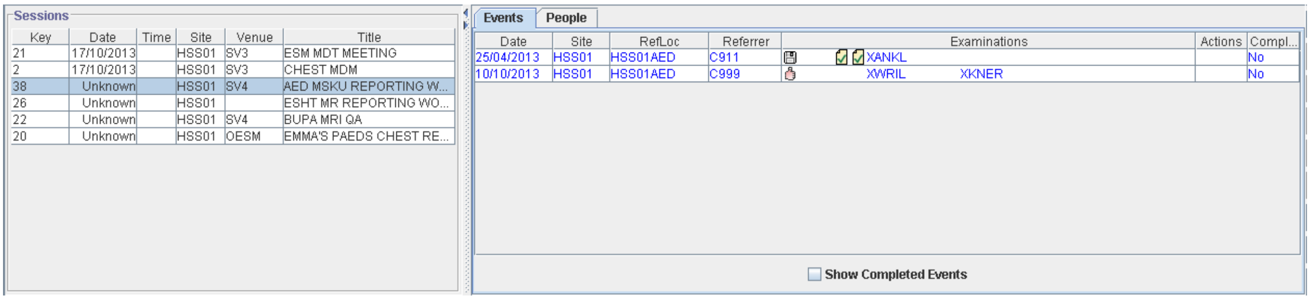
STARTING A SESSION / MEETING

1. To start a session / meeting you should first search for and display all outstanding meetings using the ‘Sessions’ search fields at the top of the screen using any combination of the following search fields.



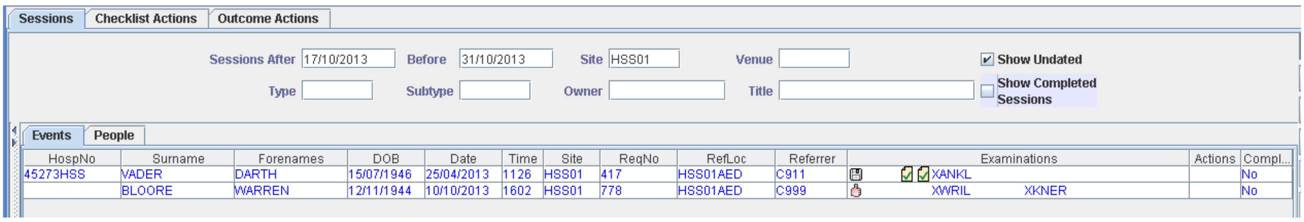
Field	Description
Sessions After	Enter a relevant date range for searching purposes.
Before	
Site	Enter a relevant site. This field cannot be left blank.
Venue	Use this field to filter by Venue / Meeting Room.
Type	Use this field to filter by Meeting Type – i.e. MDT or Reporting Worklist.
Subtype	Additional filter if required – i.e. Type = MDT Subtype = Breast MDT.
Owner	Filter by Meeting Organiser.
Title	Filter based on title – text search.
Show Undated	This filter is recommended as standard as session dates are now obligatory.
Show Completed Sessions	Optional filter to enable you to include or omit completed meetings.

2. Having completed the relevant search criteria click the [Refresh] button the display all Outstanding Sessions.

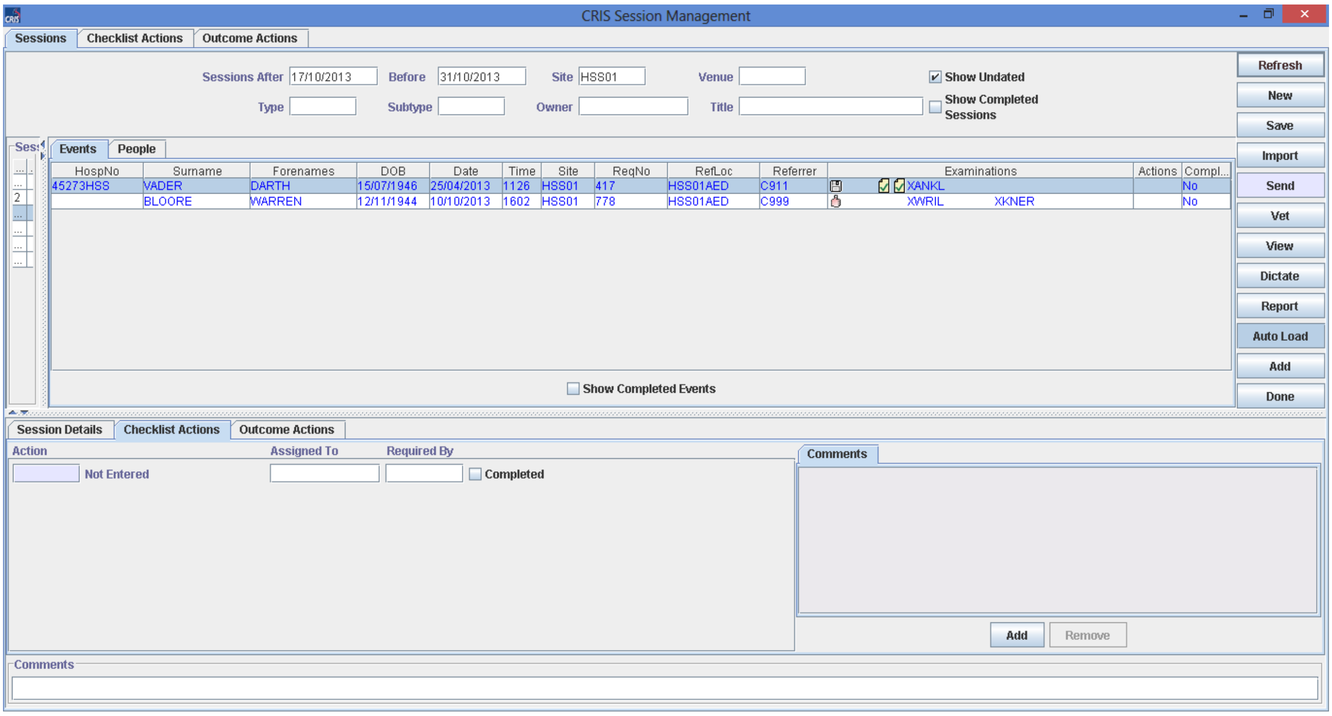


3. Highlight the relevant Session / Meeting on the list and click the ‘People’ tab to indicate which participants have attended the meeting.

4. When all meeting participants are acknowledged you can begin the meeting by selecting the ‘Events’ tab to begin discussing the first event. It is also possible to double-click the ‘Session Title’ to display an **EXPANDED SESSION / PATIENT VIEW –** which includes the patient names and additional details.



REVIEWING EVENTS / PATIENT RECORDS

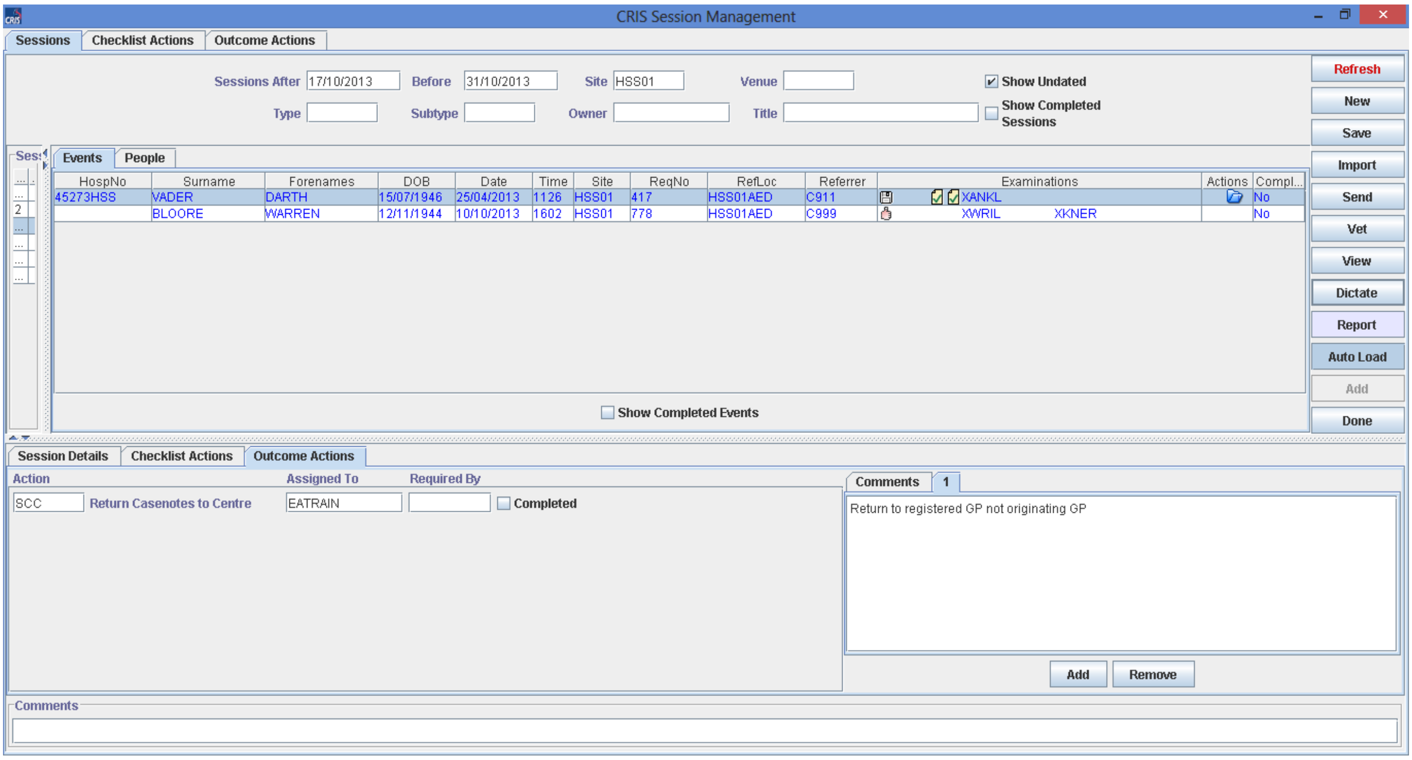


Once you have loaded a session you can begin reviewing events / patient records using any of the following function buttons:

Field	Description / Purpose
[Send]	This function is designed to enable you to load the Event Details for review or editing purposes.
[Vet]	This button enables you to access the 'Event Info' screen to vet and protocol requests as applicable.
[View]	This button will display the CRIS Report Viewer to enable you to review all previous events for the patient including documents, and images; the latter is only if using a PACS workstation which has this functionality supported via your PACS vendor.
[Dictate]	Use this button to dictate report, or addendum reports as applicable. This function will also display associated documents and images; the latter is only if using a PACS workstation.
[Report]	Use this button for reporting using Voice Recognition or direct transcription. This function will also display associated documents and images; the latter is only if using a PACS workstation.
[Auto Load]	Click this option to enable [Auto Load] then depending on the CRIS system mode in use (i.e. Vetting, Dictation, Reporting etc.) the user will only need to select the 1st Event in the session and all subsequent patients will auto-load one after another. To pause the session to 'add an 'Outcome Action' or 'Comment', press [F5] to return the Session Management screen. The session can be restarted again by selecting the next event and clicking the required function button. Please note: This mode is designed for use in conjunction with reporting worklists and is not typically suitable for meetings.

OUTCOME ACTIONS – To be completed following the Session / Meeting

OUTCOME ACTIONS allows those attending the meeting to specify ACTIONS which arise during the Session / Meeting and will need to be addressed following the meeting.



1. To assign an **OUTCOME ACTION** via an Event / Patient Record highlight the appropriate record and click on the **'Action'** field at the bottom of the screen.

Field	Description
Action	Press [F4] to select an Action Code from the prompt list, or type the code directly.
Assigned To	Use this field to specify the person responsible for completing the action via the using the [F4] prompt or by typing their code directly.
Required By	Enter a deadline date where possible as this enables other users to prioritise their outstanding actions. This this field can be left blank for on-going actions.
Completed	This box can be ticked by the person the action is assigned to indicate that the action is complete.
Comments	Click the [Add] button to assign comments against any action. These can be entered at any time by the person setting the action, the person completing the action or other people attending the meeting. All saved comments will be marked with details of the author in addition to date and time of entry. You can also choose to [Delete] comments at the time of entry but once saved comments remain on the record.

2. Click [Save] to complete the Action. This will display the following icon 

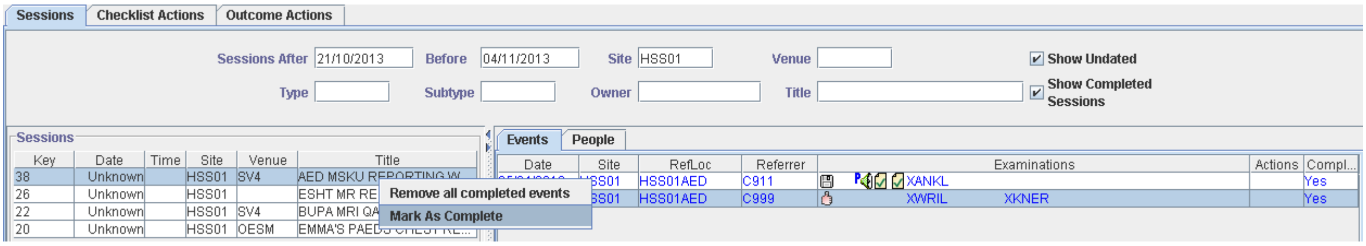
indicating an outstanding action against the event. For icon for an **Outcome Action** is displayed to the **RIGHT**, whilst **Checklist Actions** are to the **LEFT**. Once 'Completed' the actions icon will be displayed as the following icon. 

MARKING EVENTS / PATIENT RECORDS AS COMPLETED

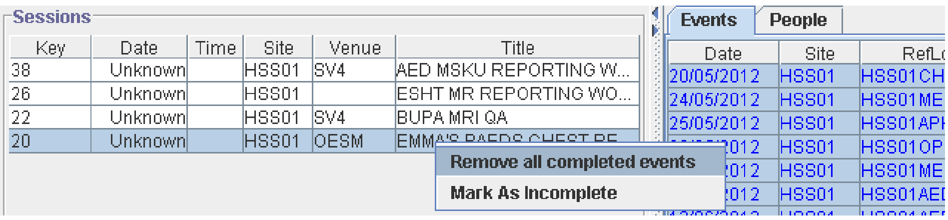
Once a patient event / record has been completed – i.e. discussed or reported you should mark the record as **COMPLETED** by right clicking the event / patient record and choosing **'Mark as complete'** from the resulting menu. This will update the 'Completed' column via the Events list as a visual reference and to enable column reordering.

Alternatively, it is also possible to **SELECT A RANGE** or **ALL EVENTS** using [Ctrl + Left Click or Shift + Left Click] before right clicking and setting the whole selection to **'Mark as complete'.**

This is the process required to **END THE MEETING / REPORTING SESSION** as once you have marked records as complete you can right click the Session Name and select **'Remove all completed events'** followed by selecting **'Mark As Complete'**. Once completed the session will no longer show in the list unless specifically asked for with the "Include Complete" checkbox.

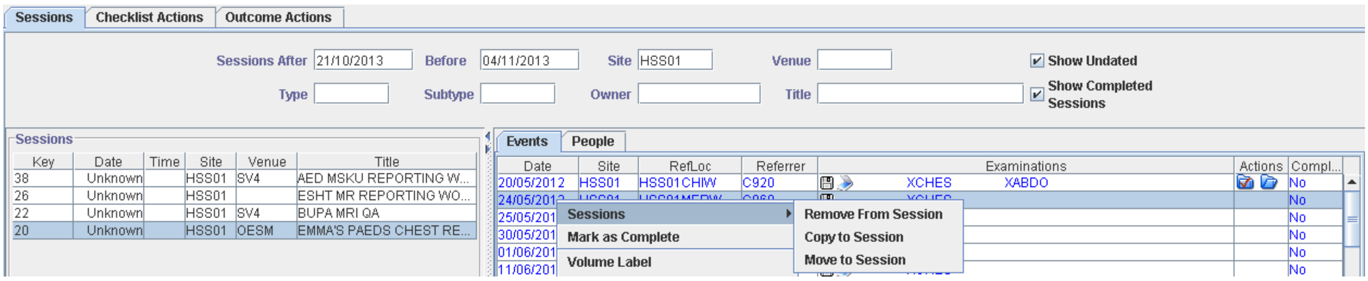


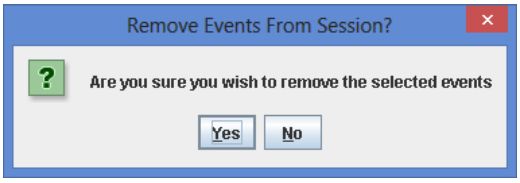
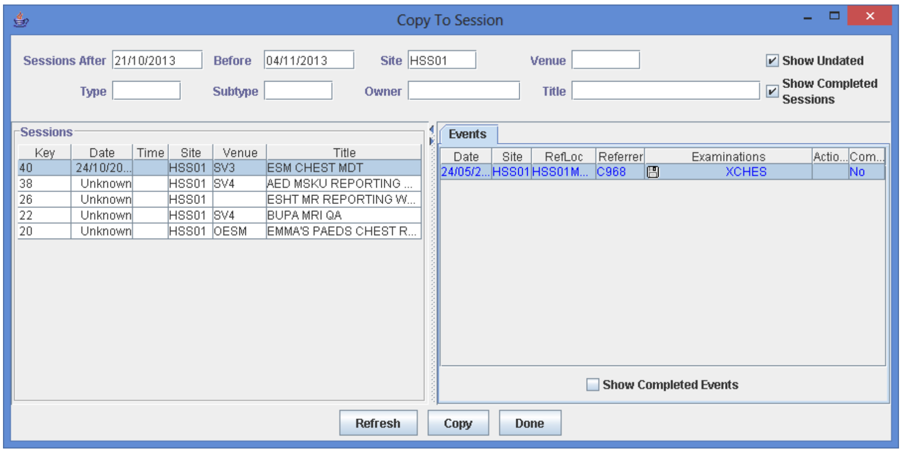
The other advantage to marking events as complete is this you can also choose to reduce the list by streamlining the remaining events using **'Remove all completed Events'** followed by **'Mark as Incomplete'** so that the remaining events will remain visible in the sessions for you to return to at a subsequent date or time. This is particularly useful for Reporting Worklists populate from Statistical Reports.



Editing / Administrating Session Lists – Remove, Copy and Move events / patient records

It is possible to **EDIT A SESSION** to **REMOVE, COPY or MOVE** any events / patient records in any time.



Field	Description
Remove from Session	This option should be used to remove events added to the session in error or those that are no longer required. To do this select one, or more events, right click and select 'Remove from Session' from the resulting menu. You will be presented with a confirmation message, and you should click [Yes] to proceed or [No] to cancel.  Please note: This option should not be used instead of marking events as complete, as you should use 'Remove Completed Events' via the Session Title instead.
Copy to Session	This function is designed to enable you to **COPY ONE** or **MULTIPLE EVENTS** to follow-up or related meetings. To do this select one, or more events, right click and select **'Copy to Session'** from the resulting menu. You will be presented with the following screen, and will need to find all relevant sessions using the 'Search' fields at the top and [Refresh] function button at the bottom of the screen. Highlight the destination Session on the list and click the [Copy] function button at the bottom of the screen to copy the event from one session to another.  Please note: The original event / patient record will also remain on the original session.
Move to Session	The function allows you to **MOVE ONE** or **MULTIPLE EVENTS** to a follow-up or related meeting or in the event that the event has been inadvertently assigned to the wrong session. To do this select one, or more events, right click and select **'Move to Session'** from the resulting menu. You will be presented with the following screen, and will need to find all relevant sessions using the 'Search' fields at the top and [Refresh] function button at the bottom of the screen. Highlight the destination Session on the list and click the [Move] function button at the bottom of the screen to copy the event from one session to another.

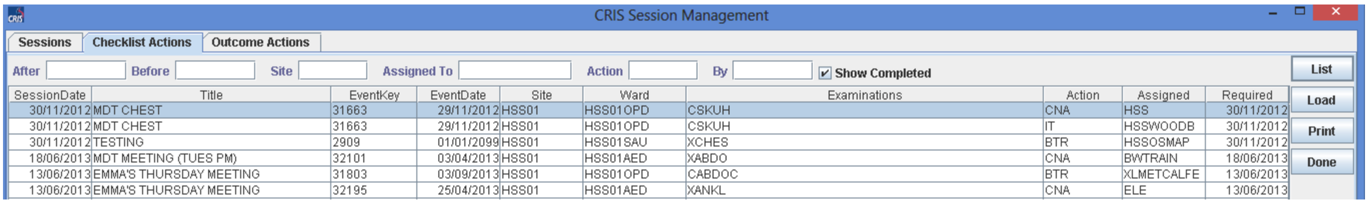
It is also possible to undertake this action via the [Sessions] worklist from the CRIS Main menu.

Checklist Actions and Outcome Actions Tabs

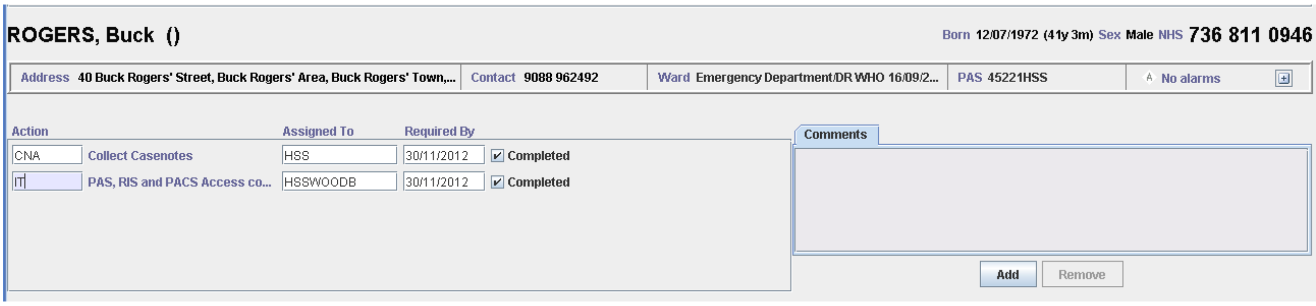
The **CHECKLIST ACTIONS** and **OUTCOME ACTION** screens are designed as administrative tools which enables clerical and clinical users to identify any outstanding actions that have been assigned to them (or others users) and appropriately complete the action prior to, or following a session / meeting.

CHECKLIST ACTIONS – Required prior to the Session / Meeting

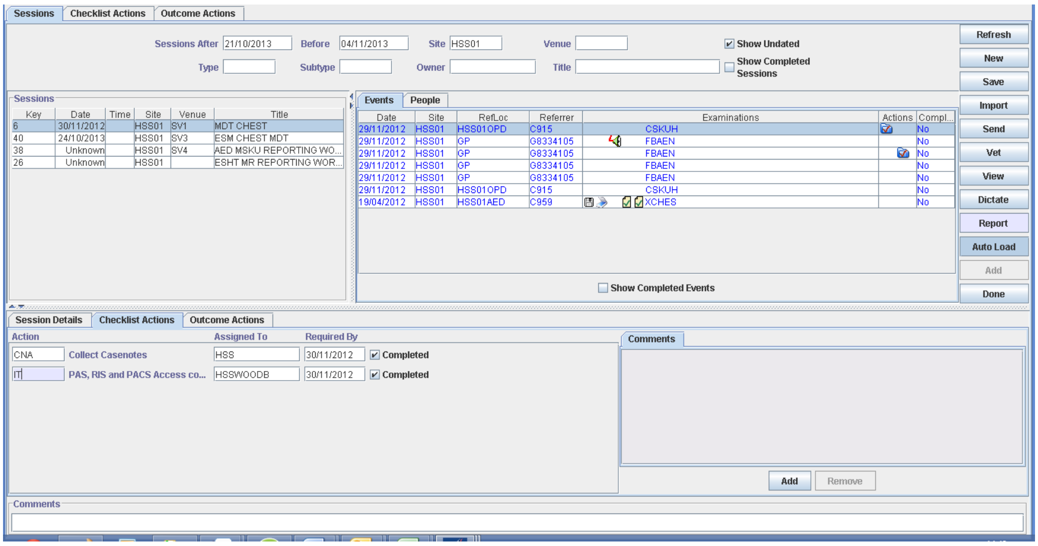
You should complete any required filters, or leave the fields blank to return all pre session meeting actions and clicking the [List] function button on the right hand side of the screen. It is also possible to reorder any columns by clicking the headers (once for ascending, twice for descending order).



VIEWING PATIENT DETAILS – You can double click the action to view the patient details as follows:



If you would like to view the Session itself you can also click [Load] which will move you to the Sessions screen with all associated events. This is useful if you are working through unallocated actions.



It is also possible to [Print] the list to generate a copy of all actions in the following format:

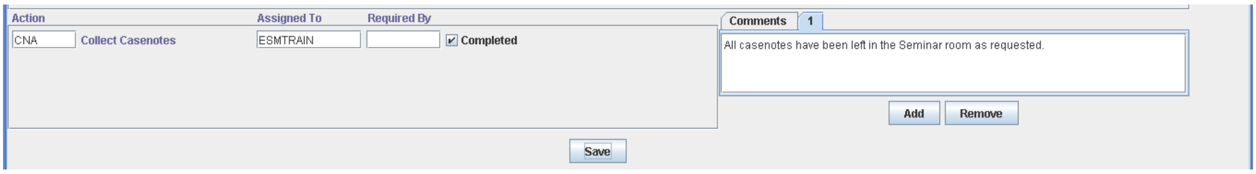
CRIS Stats Viewer

Date Run : 21/10/2013 ACTIONLIST Pag
Time Run : 1437 Outstanding Actions List Run By : HSSSAVAE

CRIS No.	Name	Event key	Site	Referring Locat	Session date	Title	Action code	Description	Assigned to	Required by	Completed date
9311	GEMMA CHRISTINE TAYLOR	32103	HSS01	HSS01AED	24/10/2013	ESM CHEST MDT	CNA	Collect Casenotes			
22068	WELL BEING	32403	HSS01	HSS01OPD	13/06/2013	EMMA'S THURSDAY MEET	MDT	Keep on list for next meeting			
18144	JOHN LEWIS	32872	HSS01	HSS01AED		AED MSKU REPORTING W	CNA	Collect Casenotes	ESMTRAIN		
21860	PETER PAN	31502	HSS01	HSS01AED		AED MSKU REPORTING W	CNA	Collect Casenotes	ESMTRAIN		
21411	BUCK ROGERS	31663	HSS01	HSS01OPD	30/11/2012	MDT CHEST	CNA	Collect Casenotes	HSS	30/11/2012	21/10/2013
18549	ALAN STEPHEN WILSON	2909	HSS01	HSS01SAU	30/11/2012	TESTING	BTR	Collect Blood Test Results	HSS0SMAP	30/11/2012	30/11/2012
21411	BUCK ROGERS	31663	HSS01	HSS01OPD	30/11/2012	MDT CHEST	IT	PAS, RIS and PACS Access confi	HSSWOODB	30/11/2012	21/10/2013
18549	ALAN STEPHEN WILSON	2909	HSS01	HSS01SAU	30/11/2012	TESTING	AR	Arrange Re Scan	PHILIPS_TG	31/12/2012	30/11/2012
21403	SCARLETT OHARE	31658	HSS01	GP	30/11/2012	MDT CHEST	AR	Arrange Re Scan	PHILIPS_NB	29/05/2013	29/11/2012
12936	DOREEN AHMED	32101	HSS01	HSS01AED	18/06/2013	MDT MEETING (TUES PM	MDT	Keep on list for next meeting	ESMTRAIN	11/06/2013	
21840	EMMA TEST	31803	HSS01	HSS01OPD	13/06/2013	EMMA'S THURSDAY MEET	BTR	Collect Blood Test Results	XLMETCALFE	13/06/2013	
22019	DARTH VADER	32195	HSS01	HSS01AED	13/06/2013	EMMA'S THURSDAY MEET	CNA	Collect Casenotes	ELE	13/06/2013	
12936	DOREEN AHMED	32101	HSS01	HSS01AED	18/06/2013	MDT MEETING (TUES PM	CNA	Collect Casenotes	BWTRAIN	18/06/2013	
21379	PATIENT TEST	31373	HSS01	HSS01OPD	13/06/2013	EMMA'S THURSDAY MEET	GAMA	General Meeting Action (See Co	AWTRAIN	30/06/2013	
21879	ELENA AZZINI	32407	HSS01	GP	11/07/2013	CHEST THURSDAY	CHC	Collect Hard Copy Film	ESMTRAIN	11/07/2013	09/07/2013
21879	ELENA AZZINI	32407	HSS01	GP	11/07/2013	CHEST THURSDAY	BTR	Collect Blood Test Results	ELE	11/07/2013	
21420	DARTH VADER	31812	HSS01	HSS01AED	12/02/2013	MDT - TUES PM	AR	Arrange Re Scan	ESMTRAIN	23/07/2013	
21939	JAMES BOND	32390	HSS01	HSS01AED	26/09/2013	WED TEST	BTR	Collect Blood Test Results	BECKY	26/09/2013	
21978	MARY POPPINS	32747	HSS01	HSS01AED	10/10/2013	EA TEST THURS	CNA	Collect Casenotes	ESMTRAIN	10/10/2013	
21879	ELENA AZZINI	32761	HSS01	GP	10/10/2013	EA TEST THURS	BTR	Collect Blood Test Results	EATRAIN	10/10/2013	
8678	KERRY DOREEN HARVEY	17661	HSS01	HSS01OPD	21/10/2013	TEST MDT	IT	PAS, RIS and PACS Access confi	RJNTRAIN	21/10/2013	
13560	DENNIS ALI	10919	HSS01	HSS01CHIW		EMMA'S PAEDS CHEST R	CNA	Collect Casenotes	EATRAIN	24/10/2013	17/10/2013
13560	DENNIS ALI	10919	HSS01	HSS01CHIW		EMMA'S PAEDS CHEST R	SCC	Return Casenotes to Centre	EATRAIN	31/10/2013	

TO COMPLETE A CHECKLIST ACTION

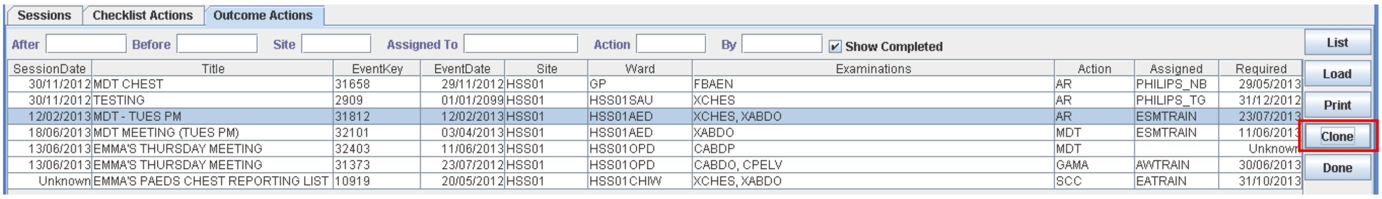
To complete a 'Checklist Action' you should highlight the relevant action, and tick completed. You can also click [Add] if you would like to record any notes against the event. Finally click [Save] at the bottom of the screen to complete the process.



OUTCOME ACTIONS – RESULTING FROM THE SESSION / MEETING

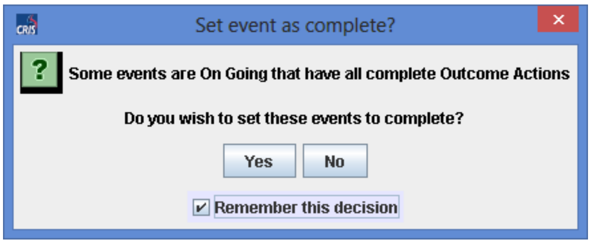
The Outcome Actions screen work in the same way as Checklist Actions but this is an administration tool for resolving actions resulting from the meeting.

All functionality is the same except as described in the previous section but there is also an additional **[Clone]** function button which allows you to **CLONE THE EVENT DETAILS** for use in requesting rescans – i.e. Planned Events in 6 months, 1 year etc. It may however be necessary to amend details such as Referring location and Referrer as applicable.



SessionDate	Title	EventKey	EventDate	Site	Ward	Examinations	Action	Assigned	Required
30/11/2012	MDT CHEST	31658	29/11/2012	HSS01	GP	FBAEN	AR	PHILIPS_NB	29/05/2013
30/11/2012	TESTING	2909	01/01/2099	HSS01	HSS01SAU	XCHES	AR	PHILIPS_TG	31/12/2012
12/02/2013	MDT - TUES PM	31812	12/02/2013	HSS01	HSS01AED	XCHES, XABDO	AR	ESMTRAIN	23/07/2013
18/06/2013	MDT MEETING (TUES PM)	32101	03/04/2013	HSS01	HSS01AED	XABDO	MDT	ESMTRAIN	11/06/2013
13/06/2013	EMMA'S THURSDAY MEETING	32403	11/06/2013	HSS01	HSS01OPD	CABDP	MDT		Unknown
13/06/2013	EMMA'S THURSDAY MEETING	31373	23/07/2012	HSS01	HSS01OPD	CABDO, CPELV	GAMA	AWTRAIN	30/06/2013
Unknown	EMMA'S PAEDS CHEST REPORTING LIST	10919	20/05/2012	HSS01	HSS01CHIW	XCHES, XABDO	SCC	EATRAIN	31/10/2013

Having completed all actions against an event you may be presented with the following message if the event was not ‘marked as completed’ during the session. You can choose to set the events as completed if applicable which will prevent them from appearing in future sessions, or say [No] if the events are ongoing.



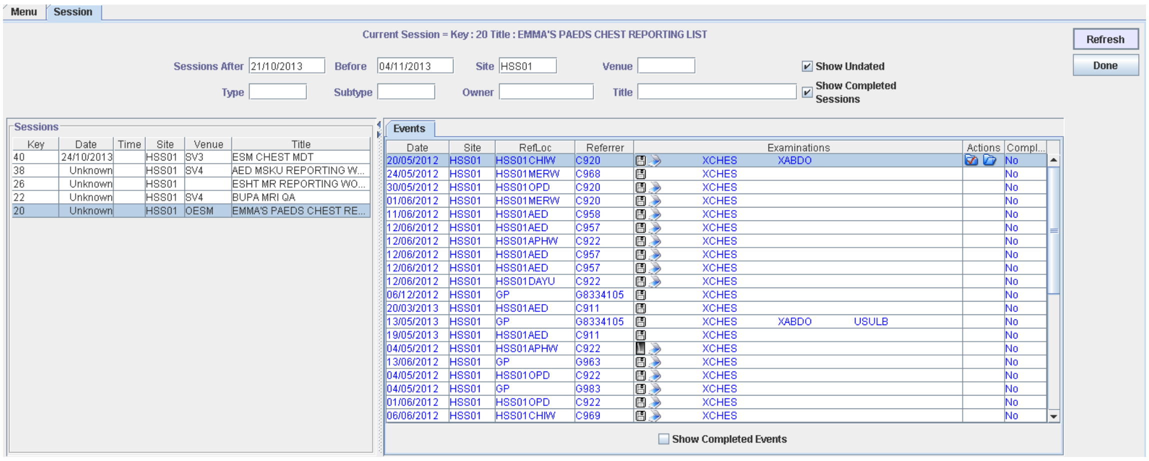
Viewing Events assigned to Sessions via Event Details

If an event / patient record is assigned to a Session this will be displayed via the **‘Sessions’** tab in the **<u>‘Event Details’</u> screen** next to the ‘Status’ history. This shows all the sessions that the selected event is part of. You can also double click on the record via the ‘Session’ tab to display / update any ‘Outcome Actions’ assigned to the event following the session / meeting.

It is also possible to right click the session choose **‘Show In Management’** to display the Session Module.

The [Sessions] Worklist via CRIS Main Menu screen

It is possible to access a view only version of the all Sessions via the [Sessions] worklist on the CRIS Main Menu screen. You can then use this screen to search for all existing meetings and associated events assigned to sessions using the filter boxes at the top of the screen and the [Refresh] function button.



You can also right click as Session and choose **‘Show in Management’** to launch the Sessions module, or right click an event to access **‘Session’** tools such as REMOVE, COPY and MOVE, and to **‘Mark as complete’** as applicable.

Sessions Module System Access

CRIS LICENSES

A valid trust license will be required for the CRIS Sessions Module. You can check if a valid 'SESSIONS' Module Code has already been applied to the system via **TABLES > SYSTEM TABLES > LICENSES.** In the event that the license is not present and you have purchased the 'Sessions Module' or the module is 'Inclusive' to your CRIS deployment this can be requested via your Client Manager or the Helpdesk.

XR SETTINGS

The following XR setting are designed for use with the Sessions Module. These settings can be applied at XRTR (Trust), XRS (Site) or XRT (Terminal) Level as applicable via **TABLES > SYSTEM TABLES > XR SETTINGS.**

Setting	Description
General.SessionModuleAvailable	Specifies if the Specifies if the module is available on a terminal.
SESSION.AutoLoadNextEvent	Allows the [Auto load] button to show on the session management module.
SESSION.SendPreadmitMessageDaysBefore	Sets the number of days before a session to send pre admit images on PACS.

SECURITY SETTINGS

The following security settings are required to access the Sessions Module. HSS recommend that the Trust create a new **ACTIVITY** Group called ***MODSES = Sessions Module***. You should then assign **MODSES** Activities to all relevant ROLES. This can be undertaken via **TABLES > PEOPLE > SECURITY SETTINGS.**

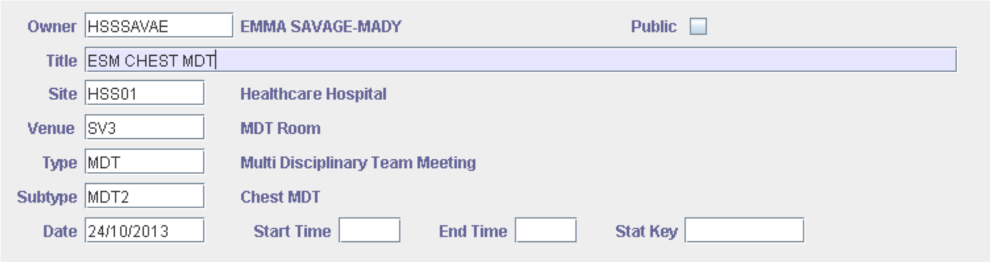
In this way during a pilot phase of the Sessions Module each individual user can just have the MODSES Activity assigned to their existing Userids via Staff Tables and [Edit Group]. Then when the Trust / Site are ready to go live with the Sessions Module you can assign the Activity MODSES to all relevant ROLES to activate this for all appropriate users (i.e. RADIOL, RADREP etc).

The use of Activities rather than simply adding security settings to each role makes it much easier update the Sessions Module with any new security settings which are associated with future module developments.

Section	Item	Description
VIEWS	SESSIONS	Allows access to the Sessions Module.
VIEWS	SESSION_SUBTYPE	Allows System Managers access to the **Session Subtype Table** – Chest MDT.
VIEWS	ACTIONCD	Allows System Managers access to the **Session Action Codes Table** to create check list and outcome actions.
VIEWS	VENUES	Allows System Managers access to the **Venue Setup Table** – i.e. locations.

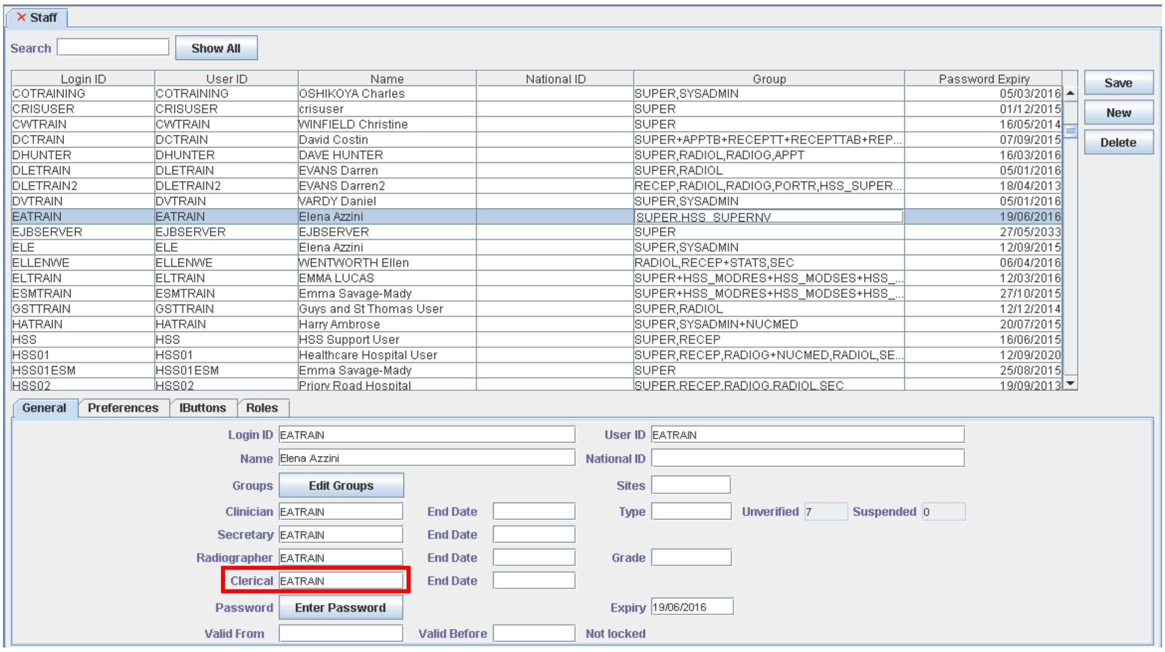
Session Module Table Configuration

To use the Sessions Module it will be necessary to configure the following CRIS System Tables to facilitate the creation of Meetings and Reporting Worklists.

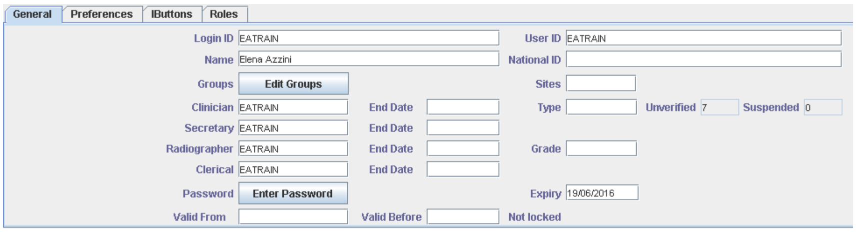


ASSIGNING MEETING PARTCIPANTS AND ADMINSTRATIVE USERS

This table is required to give users access to the Session module. All users who will be involved in a Session either as a participant or undertaking administrative actions prior to or following the meeting will need to allocated a Clerical ID via **TABLES > STAFF**.

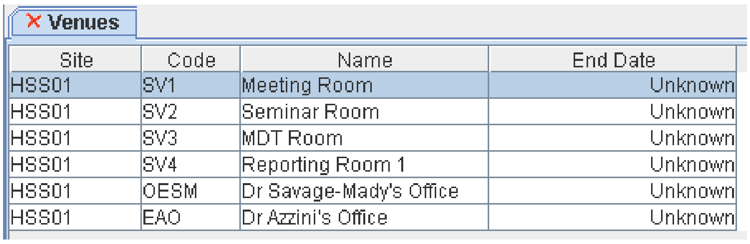


Highlight the Login ID of the person and enter the new Clerical code – this should be the same as any existing Clinician, Secretary or Radiographer codes. Click [Save] to confirm the changes. This will reciprocally add the User to the **CLERICAL TABLE** and enable them to be selected as a meeting 'Owner', 'Participant' and or to have actions 'Assigned To' them via the Sessions Module.

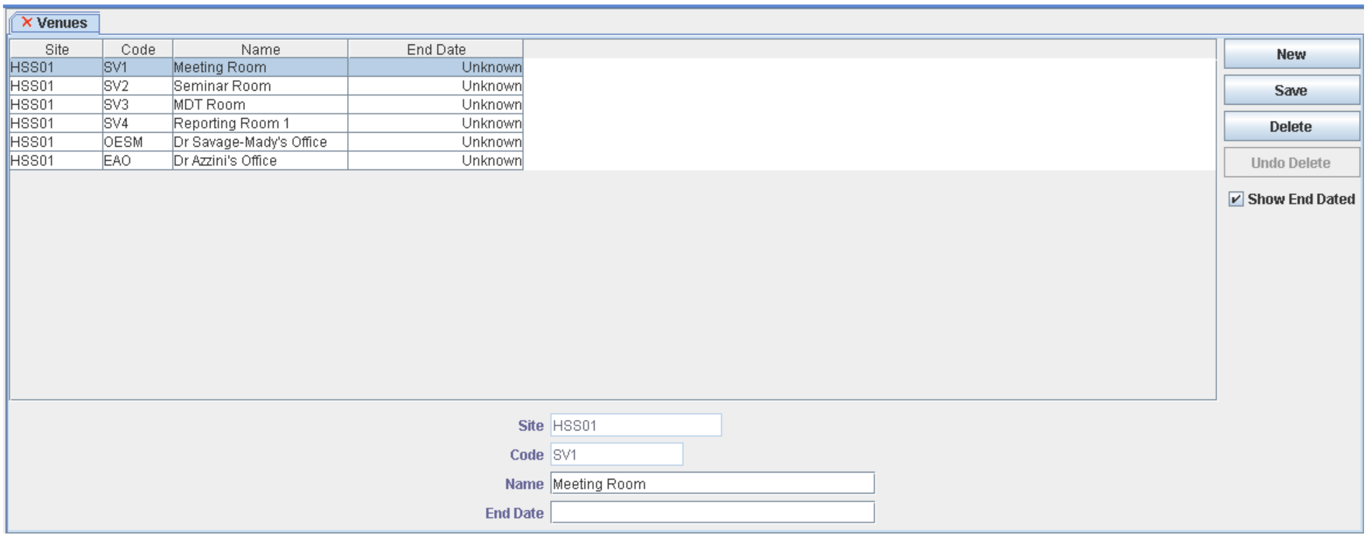


CREATING MEETING VENUES

To schedule a Session it will be necessary to create venues for Sessions / Meetings to specify all physical locations where the module will be used i.e. Seminar Rooms, MDT Rooms, Reporting rooms etc.


Venues

Site	Code	Name	End Date
HSS01	SV1	Meeting Room	Unknown
HSS01	SV2	Seminar Room	Unknown
HSS01	SV3	MDT Room	Unknown
HSS01	SV4	Reporting Room 1	Unknown
HSS01	OESM	Dr Savage-Mady's Office	Unknown
HSS01	EAO	Dr Azzini's Office	Unknown


Venues

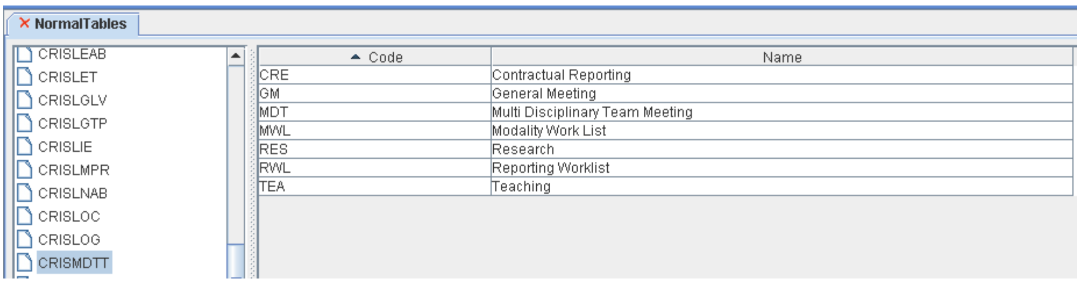
Site	Code	Name	End Date
HSS01	SV1	Meeting Room	Unknown
HSS01	SV2	Seminar Room	Unknown
HSS01	SV3	MDT Room	Unknown
HSS01	SV4	Reporting Room 1	Unknown
HSS01	OESM	Dr Savage-Mady's Office	Unknown
HSS01	EAO	Dr Azzini's Office	Unknown

Field	Description
Site	Hospital where the venue is located
Code	Unique code to identify the venue / room
Name	Venue description – i.e. Seminar Room, Meeting Room 1, Reporting Room 1
End Date	Used to deactivate the room if no longer required

Once you have configured the room, press the [Save] function button to make the room active within the Session's Module.

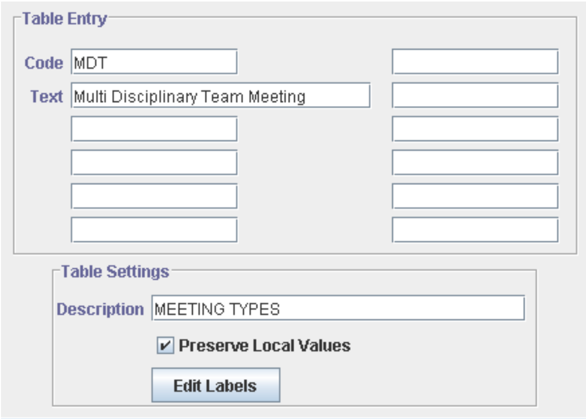
DEFAULT MEETING TYPES

The system is preconfigured with the following default Meeting Types via the CRISMDTT table in **TABLES > SYSTEM > NORMAL TABLES.**



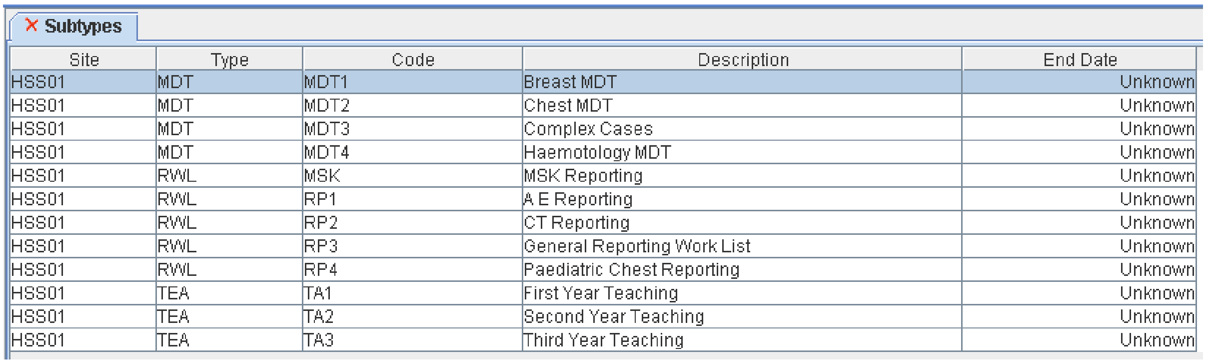
Code	Name
CRE	Contractual Reporting
GM	General Meeting
MDT	Multi Disciplinary Team Meeting
MWL	Modality Work List
RES	Research
RWL	Reporting Worklist
TEA	Teaching

It is possible to add additional meeting types but this is a system wide table (i.e. Consortium level) so any entries must be agreed with all relevant RIS Administrators. Any amendments to this table should be marked **'Preserve Local Values'** to ensure that they are maintained in any subsequent system updates.



CREATING SUB MEETING TYPES

The system has been designed to enable Trust's to add their own meeting **'Sub Types'** via **TABLES > OTHER TABLES > SESSIONS > SUBTYPES.**

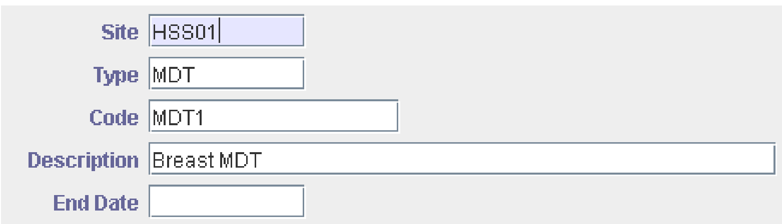


Subtypes

Site	Type	Code	Description	End Date
HSS01	MDT	MDT1	Breast MDT	Unknown
HSS01	MDT	MDT2	Chest MDT	Unknown
HSS01	MDT	MDT3	Complex Cases	Unknown
HSS01	MDT	MDT4	Haemotology MDT	Unknown
HSS01	RWL	MSK	MSK Reporting	Unknown
HSS01	RWL	RP1	A E Reporting	Unknown
HSS01	RWL	RP2	CT Reporting	Unknown
HSS01	RWL	RP3	General Reporting Work List	Unknown
HSS01	RWL	RP4	Paediatric Chest Reporting	Unknown
HSS01	TEA	TA1	First Year Teaching	Unknown
HSS01	TEA	TA2	Second Year Teaching	Unknown
HSS01	TEA	TA3	Third Year Teaching	Unknown

Meeting subtypes allow you to describe the meeting in more detail – i.e. Meeting Type = Reporting Worklist, Subtype = MSK Reporting or a Meeting Type = MDT with a Subtype = Breast MDT.

To create a new meeting subtype, press the [New] button to create a new entry in the table and complete the fields below.



Field	Description
Site	Hospital where the subtype meeting will be held.
Type	Select 'Parent' Meeting Type from [F4] Prompt list or type code if known.
Code	Unique Subtype identifier.
Description	Subtype Description – i.e. Breast MDT, MSK Reporting.
End date	Used to deactivate the subtype if no longer required.

DEFINING CHECKLIST AND OUTCOME ACTIONS

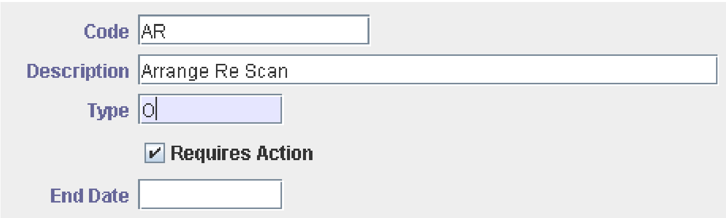
There are two types of actions - Checklist Actions which are assigned ahead of Sessions / Meetings, and Outcome Actions which are assigned during Sessions / Meetings. Check list actions are tasks that need to be completed before the meeting begins. Outcome actions are tasks to complete once the meeting has finished.

It is possible to add additional Action Codes but this is a system wide table (i.e. Consortium level) so any entries must be agreed with all relevant RIS Administrators.

ActionCodes

Code	Description	Type	Requires Action	End Date
AR	Arrange Re Scan	O	✔	Unknown
BTR	Collect Blood Test Results	C	✔	Unknown
CANC	Cancel Event	O	✔	Unknown
CHC	Collect Hard Copy Film	C	✔	Unknown
CNA	Collect Casenotes	C	✔	Unknown
GAMA	General Meeting Action (See Comments)	O	✔	Unknown
GPMA	General Pre Meeting Action (See Comments)	C	✔	Unknown
IT	PAS, RIS and PACS Access confirmed in room	C	✔	Unknown
MDT	Keep on list for next meeting	O	✔	Unknown
SCC	Return Casenotes to Centre	O	✔	Unknown

Press the [New] button to create a new entry in the table and complete the fields below.



Field	Description
Code	Unique code to identify the action.
Description	Task required to complete the action.
Type	This is either an Outcome action or a Checklist action.
Requires Action	Specifies that the current action will require further action as part of the code.
End Date	Used to deactivate the code.

Click [Save] to complete the process.

Document Control

Title	CRIS Sessions Module – Meeting Management and Bespoke Reporting Worklists		
Author	HSS Training Manager	**Date Created**	01/09/2009
File Ref.	CRIS_CRIB_IM_351_Sessions Module_V2.2.doc		
CRIS Version	2.09.10p		

Change History

Issue	**Date**	**Author / Editor**	**Details of Change**
V1.0	01/09/2009	David Costin	First Issue
V1.1	13/05/2011	David Costin	Amendments to clarify the Auto load feature, check list / outcome action tabs and system configuration.
D2.0	21/10/2013	Emma Savage-Mady	2.0 issue due to significant training documentation format review in line with ISO 13485 and release of 2.09.10p.
V2.0	31/01/2014	Emma Savage-Mady	First Issue for 2.09.10p
V2.1	13/08/2014	Emma Savage-Mady	Amendment to omit MWL security setting which refer to Modality Worklist rather than Session Module Worklists.
V2.2	15/02/2017	Emma Savage-Mady	Amendment to Site details which cannot be left blank.
Review Date		15/02/2019	