



The Radiology Information Solution

Sessions Module

Meeting Management & Bespoke Reporting Worklists

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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 Team 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.

CRIS Session Management	- 🗆 🗙							
Sessions Checklist Actions Outcome Actions								
Sessions filter 10/01/2012 Defere 10/10/2012 Site Venue	Refresh							
The State and St	New							
Type Sumple The Sessions	Save							
Sessions f Events People	Import							
A Key Date Time Site Venue Title People to use session Attended 2 Unknown HS301 (SY3) CHESTMDM Image: Chest of the session Attended	Sond							
	Vet							
20 Unknown HS01 OESM EMMA'S PAEDS CHEST REPORTING LIST AND A CONTRAINT Becky Woods	View							
22 Unknown HSS01 SV4 BUPA MRI 0A 26 Linknown HSS01 EVH DEPOTING WORK IST	Dictate							
37 10/10/2013/1200 HSSPF HPB MOT A ELE Elena Azzini	Report							
	Auto Load							
CCTRAIN David Costin	Add							
SFFTRAIN FORREST Stuart	Done							
	<u> </u>							
Session Details Checklist Actions Outcome Actions								
Owner HSSSAVAE EMMA SAVAGE-MADY Public								
Title EMMA'S THURSDAY MEETING								
Site HSS01 Healthcare Hospital								
Venue SV1 Meeting Room								
Type MDT Mutti Disciplinary Team Meeting								
Subtype MDT2 Chest MDT								
Date 13/06/2013 Start Time 1200 End Time 1300 Stat Key								
Companya								
Comments Chancials Riscuits essential to a successful outcome								

- 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.
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Туре	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.

Events People	
People to use session	Attended
EATRAIN Elena Azzini	
SFFTRAIN FORREST Stuart	
Clerical Name RD1TRAIN ROYAL UNITED HOSPITAL BATH A	
RINTRAIN Portsmouth Training USer RINTRAIN EAST CHESHIRE NHS TRUST RM3TRAIN SALFORD ROYAL NHS	

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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.

Menu	Report Info Lists								
Ξ	Rep. by HSSSAVAE	Typed by	Start date 19/09/2	2013 🔰 End date 🔇	10/10/2013	> Patient Type			
	Trust HSS	Site HSS01	Unit	Req. Cat.		Modality			
Filt	er Profile No profile s	elected v New	Save Delete	🔄 Auto Load Filters					
Unveri	fied Suspended	Unreported Verified	Report QA						
Unrepo	rted Events: 1				Include Statu	us Show Clini	ians		Refresh
	Options				✓ Dictated	V Unnrocessed V Show S	elected 📄 Show Una	llocated 📃 Show All	Stop
Hos	pNo Surnam	e Forenames	DOB Date	Time Site R	leaNo V	Volume Label	Examinations	R	epUra
45219H	SS RABBIT	ROGER	18/06/1948 24/09/2013	1509 HSS01 729	HS	Attendance Label	XCHES	XABDO S	
						Volume & Attendance Labels			
					F	Print Image Documents	•		
					F	Print Exam Details			
					F	Properties			
					5	Send Note			
					b	Move			
					E	Delete			
					F	Resequence Attendance number	s		
					ι	Undo Attend			
					P	Add to Session			

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

Events	Event Info	Event Details	
RegNo	RefLoc	Referrer	
quest	GP	G8334105	ů <u> </u>
A	HSS01AED	C911	Request Label
			Print Letter
			Print Exam Details
			Properties
			Send Note
			Move
			Delete
			Resequence Attendance numbers
			Cancel
			Flag as attended
			Request Porter
			Add To Diary
			Add to Session





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.

Sessions Checklist Actions Outcome Actions														
Sessions After 10/01/2013 Before 10/10/2013 Site Venue Venue Show Undated										Refresh				
				т	subture				Titlo			Show Completed		New
					ype cumype							Sessions		Save
Session	s					11	Events F	People						Import
🔺 Key	Date	Time	Site	Venue	Title		Date	Site	RefLoc	Referrer		Examinations	Actions Compl	
38	Unknown	1	HSS01	SV4	AED MSKU REPORTING WORKLIST	2	25/04/2013	HSS01	HSS01AED	C911	H	XANKL	No	Send
2	Unknown	1	HSS01	SV3	CHEST MDM						_			
11	12/02/2013	31500	HSS01	SV3	MDT - TUES PM									Vet
18	13/06/2013	31200	HSS01	SV1	EMMA'S THURSDAY MEETING									
19	13/06/2013	31200	HSS01	SV2	ELE'S THURSDAY MEETING									View
20	Unknown	1	HSS01	OESM	EMMA'S PAEDS CHEST REPORTING LIST	18								
21	Unknown	1	HSS01	SV3	ESM MDT MEETING	18								Dictate
22	Unknown	1	HSS01	SV4	BUPA MRI QA									
26	Unknown)	HSS01		ESHT MR REPORTING WORKLIST									Report
														Auto Load
						-								Add

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

<u>Please note</u>: 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.

Filter	Key	Name	Owner
	71206864	ADHOC	David Costin
Name	71206764	Soft Form Test 2042	Steve Jennings
	71206761	ADHOC Use this one!	David Costin
	71206760	ADHOC	David Costin
- 11	71206758	RIS_STAT250: Patient View Logging	Steve Jennings
stin	71206754	RIS_STAT100: Demand - Total number of r	Steve Jennings
	71206656	boo's test	becky
	71206257	ChestRays	David Costin
re Hospital	71205457	Test 1865	HSS Support User
Doom	71205168	RIS_STAT120a: PART I-Patients Waiting	Steve Jennings
Room	71205154	RIS_STAT262: Dictation Locks & Untyped	Steve Jennings
ciplinary Team Meeting	71204666	ADHOC	Steve Jennings
	71204563	1	Steve Jennings
)1	71204561	1	Steve Jennings
me 1400 End Time 1600 Stat Key			

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- 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.

Enter dates for list	
AND]
EVENTS.Date >= STAT.START DATE	
AND	
EVENTS.Date <= STAT.END DATE	
AND	
STATUS.Category = AT	
AND	
STATUS.Current = Y	
AND	
EXAMS.Examination = EXAMCD.CODE	
AND	
EXAMS.Examination = XCHES	
AND	
STATUS. Type = ATP	
AND	
EXAIVIS.Reported = N	
AND EVENTS Is Distated - N	
AND	
FUENTS Is Processed - V	
AND	
EXAMS Status =	
AND	
EXAMS.Date Reported =	
AND	
PATIENT Age At Event <= 16	1
Stat Start Date 01/10/2013 Stat End Date 17/10/2013	1
OK Cancel	

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).

Sessions						1	Events	People									
Kev	Date	Time	Site	Venue	Title	18	Doto	Oito	Pofl or	Poforror			Exeminations	Actions	Compl		LIST
38	Unknown	ŀ	HSS01	SV4	AED MSKU REPORTING W		20(05/2012	HSS01	HSS01CHIM	C920		XCHES	XABDO	Actions	No.		Send
26	Unknown	ŀ	HSS01		ESHT MR REPORTING WO		24/05/2012	HSS01	HSS01MERW	C968	8	XCHES	A1880		No		Conta
21	Unknown	ŀ	HSS01	SV3	ESM MDT MEETING		25/05/2012	HSS01	HSS01APHW	C922		XCHES			No		Vet
2	Unknown	ŀ	HSS01	SV3	CHEST MDM		30/05/2012	HSS01	HSS010PD	C920	ēž	XCHES			No		
22	Unknown	ŀ	HSS01	SV4	BUPA MRI QA	1	01/06/2012	HSS01	HSS01MERW	C920	ē Š	XCHES			No	HI	View
20	Unknown	ŀ	HSS01	OESM	EMMA'S PAEDS CHEST RE		11/06/2012	HSS01	HSS01AED	C958	83	XCHES			No		
							12/06/2012	HSS01	HSS01AED	C957	8.>>	XCHES			No	1	Dictate
							12/06/2012	HSS01	HSS01APHW	C922	8 🄊	XCHES			No	1 ;	
							12/06/2012	HSS01	HSS01AED	C957	8 🃎	XCHES			No	1	Report
							12/06/2012	HSS01	HSS01AED	C957	8 ≫	XCHES			No		Auto Land
							12/06/2012	HSS01	HSS01DAYU	C922	8 🃎	XCHES			No		Auto Load
							06/12/2012	HSS01	GP	G8334105	8	XCHES			No	Ţ	0 did
							00000000	100001	100001050	10011						-	Muu
						1.3					Sł	now Completed Eve	ents				Done
* . 																	
Session [Details C	hecklis	t Actio	ns Out	come Actions												
Action					Assigned To Requir	ed I	Ву					Comments 1	1				
CNA	Collect (Casenot	tes		EATRAIN 24/10/	201	3 🗌 Con	npleted				Please request a	ny pertinent notes from previous GP and	1 2 anv ref	errals from	n Sek	nool Nurse
												Entered by HSSS	AVAE on 17/10/2013 at 16:57	a : any ren	sirais iron	1 0 01	1001140136.
																	· .
													Add Remov	е			

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.
	Use this field to specify the person responsible for completing the action via the using the
Assigned To	[F4] prompt or by typing their code directly.
Dequired Dy	Enter a deadline date where possible as this enables other users to prioritise their
Required By	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
Completed	complete.
	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
Comments	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. Actions 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.

Sessions Checklist Actions Outcome Actions	
Sessions After 17/10/2013 Before 31/10/2013 Site HSS01 Venue Venue	Refresh
Type MDT Subtype MDT1 Owner Title Show Complete	d New
	Save

Field	Description
Sessions After	Enter a relevant date range for coarching nurneses
Before	Enter a relevant date range for searching purposes.
Site	Enter a relevant site. This field cannot be left blank.
Venue	Use this field to filter by Venue / Meeting Room.
Туре	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.

Sessions						Events	People								
Key	Date	Time	Site	Venue	Title	Date	Site	RefLoc	Referrer			Examinations	Acti	ons Co	mpl
21	17/10/2013		HSS01	SV3	ESM MDT MEETING	25/04/2013	3 HSS01	HSS01AED	C911	B	XANKL			No	
2	17/10/2013		HSS01	SV3	CHEST MDM	10/10/2013	3 HSS01	HSS01AED	C999	6	XWRIL	XKNER		No	
38	Unknown		HSS01	SV4	AED MSKU REPORTING W				1						
26	Unknown		HSS01		ESHT MR REPORTING WO										
22	Unknown		HSS01	SV4	BUPA MRI QA										
20	Unknown		HSS01	OESM	EMMA'S PAEDS CHEST RE										
						·									
											Show Completed Ev	/ents			
						8									

- 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.

	10		1/											
Sess	ions	Checklist Actions	Outcome Actions											
			Sessions After 17/10/	2013 Be	efore 31/10/3	2013	Si Own	te HSS01	Venue Title	ə	SI Se	how Undated how Completed essions		
Ev	ents	People												
	HospNo	Surname	Forenames	DOB	Date	Time	Site	RegNo	RefLoc	Referrer	Exam	ninations	Actions	Compl
452	73HSS	VADER	DARTH	15/07/1946	25/04/2013	1126	HSS01	417	HSS01AED	C911	🖪 🚺 🗹 XANKL			No
		BLOORE	WARREN	12/11/1944	10/10/2013	1602	HSS01	778	HSS01AED	C999	👌 XWRIL	XKNER		No
											^			

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REVIEWING EVENTS / PATIENT RECORDS

CONT .						CRIS Sessio	n Management	1						- 🗇 🗙
Sess	ions Checklist	st Actions	Outcome Actions											
			Sessions After 17/10/	2013 Before 31	/10/2013 Site	HSS01	Venue			✓ Show	Undated			Refresh
			Tumo	Subtano	Quina	r [Titlo			Shov	/ Completed			New
			Type	Suntype	Owner	·	nue			Sess	ions			Save
Ses	Events Peo	eople												Import
	HospNo 45273H88	Surr	ame Forename	S DOB	Date Time Si 4/2013 1126 HSS(te ReqNo	RefLoc HSS01AED	Refer	rer 🖪	Exam	inations		Actions Compl	Send
2		BLOORE	WARREN	12/11/1944 10/1	0/2013 1602 HSS	01 778	HSS01AED	C999	ð	XWRIL	XKNER		No	26-4
														VEL
														View
														Dictate
														Report
														Auto Load
														Add
					E.	Show Compl	eted Events							Done
A. <u></u>	1		V											
Sess	ion Details Ch	hecklist Act	ions Outcome Action	S Decision										
Action			Assigned	To Required By					Comments					
	Not Enter	red			Completed									
											Add	Remove		
-Comr	nents													
I														

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

Field	Description / Purpose	
[Sond]	This function is designed to enable you to load the Event Detail	s for review or editing
[Send]	purposes.	
	This button enables you to access the 'Event Info' screen to vet an	nd protocol requests as
[vet]	applicable.	
	This button will display the CRIS Report Viewer to enable you to rev	view all previous events
[View]	for the patient including documents, and images; the latter is	only if using a PACS
	workstation which has this functionality supported via your PACS ve	endor.
	Use this button to dictate report, or addendum reports as applic	able. This function will
[Dictate]	also display associated documents and images; the latter is	only if using a PACS
	workstation.	
	Use this button for reporting using Voice Recognition or direct tran	scription. This function
[Report]	will also display associated documents and images; the latter is	s only if using a PACS
	workstation.	
	Click this option to enable [Auto Load] then depending on the CR	RIS system mode in use
	(i.e. Vetting, Dictation, Reporting etc.) the user will only need to se	lect the 1 st Event in the
	session and all subsequent patients will auto-load one after anothe	er. To pause the session
[Auto Load]	to 'add an 'Outcome Action' or 'Comment', press [F5] to return th	e 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	s and is not typically suitable
	for meetings.	
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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.

Sessions Outcome Actions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Show Unitated Type Subtrype Owner Title Sossions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Sossions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Sossions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Sossions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Sossions Sessions After 1710/2013 Before 31/10/2013 Site H8801 Venue Sossions Session Amane OFFINE 16007/1844 504/2013 10/20 H8801 P70 H88017AED 0311 Site H8801 Actions Actions Completed Units 100/02/13/00/2 H8801 P70 H88017AED 0319 WARREN 1/2011/1844 10110/2013 10/2 H8801 P70 H88017AED 0319 WARREN 1/2011/1844 10110/2013 H8801 P70 H88017	CRIS						(CRIS Session	n Management						- 🗇 🗙
Sessions Atter 17102013 Before 311102013 Site 145001 Owner Show Completed Type Subtype Owner Tite Show Completed Sessions Sessions Save Sessions Actions Completed Sessions Actions Non Sessions Sessions Save Sessions Save Sessions Actions Sessions Actions Sessions Save Sessions Save Sessions Save Sessions Actions Sessions Save Save Save Save Save Save Save Save Save <td>Sess</td> <td>ions Chec</td> <td>klist Actions (</td> <td>utcome Actions</td> <td></td>	Sess	ions Chec	klist Actions (utcome Actions											
Type Subtrype Owner Title Show Completed Save Save Save HospNo Summane Forenames DOR DARTH 150/179.46 250/47013 120/179.46 250/47014 120/179.46 250/47014 120/179.46 250/47014 120/179.46 250/47014 250/47014 250/47014 250/47014 250/47014 250/47014 250/47014 250/47014 250/47014 25			5	essions After 17/10/20	3 Before	31/10/2013	Site H	18801	Venue			🖌 Sh	ow Undated		Refresh
See				Type	Subtype		Owner		Title			Sh	ow Completed		New
Session Details Checklist Actions Outcome Actions Completed Main or Regulated By Completed By Completed Centre Import						,,						Se	ssions		Save
Add Done Series Details Competed Events Sec Return Casenotes to Centre EATRAIN Completed Completed Completed Completed OP not originating OP	Sest	Events	People	Faranamaa	DOD	Dete	Time Oite	Deable	Deflee	Defer		Ever.	minationa	tationa Com	Import
BLOOKE WARKEN IDTUTISA4 IDTUTISA44 IDTUTISA4		45273HSS	VADER	DARTH	15/07/1946 2	5/04/2013 1	126 HSS01	417	HSS01AED	C911			MANER	No	Send
View Dictate Report Auto Load Auto Auto Show Completed Events Done Session Details Checklist Actions Outcome Actions Action Assigned To Required By Sco Return Casenotes to Centre EATRAIN			BLOORE	WARREN	12/11/1944 [11	001002013 p	602 (HSS01	118	HSSUTAED	0999		AWRIL	XKNER		Vet
Dictate Report Auto Load Add Session Details Checklist Actions Acton Assigned To Required By Comments Scc Return Casenotes to Centre EATRAIN Completed Return to registered OP not originating GP															View
Report Auto Load Add Add Session Details Checklist Actions Outcome Actions Action Assigned To Required By Scc Return Casenotes to Centre EATRAIN Completed Return to registered GP not originating OP	··· _														Dictate
Auto Load Add Add Session Details Checklist Actions Action Assigned To Return Casenotes to Centre EATRAIN Scc Return to registered OP not originating OP															Report
Add Completed Events Add Done Session Details Checklist Actions Outcome Actions Action Assigned To Required By Comments 1 Secc Return Casenotes to Centre EATRAIN Completed Return to registered OP not originating OP															Auto Load
Session Details Checklist Actions Outcome Actions Action Assigned To Required By Comments 1 SCC Return Casenotes to Centre EATRAIN Completed Return to registered OP not originating GP															Add
Session Details Checklist Actions Outcome Actions Action Assigned To Required By SCC Return Casenotes to Centre EATRAIN SCC Return Casenotes to Centre EATRAIN Return Casenotes to Centre EATRAIN Completed Return to registered GP not originating GP							9	Show Comple	ted Events						Done
Action Assigned To Required By SCC Return Casenotes to Centre EATRAIN	Sess	ion Details	Checklist Actio	s Outcome Actions	1										
SCC Return Casenotes to Centre EATRAIN Completed Return to registered GP not originating GP	Actio	1		Assigned To	Required	By					Comments	1			
	scc	Retur	n Casenotes to C	entre EATRAIN		Com	pleted				eturn to regi	stered GP not or	iginating GP		Ĩ
	ļ,										etann to regi	stered of hot on	iginaung or		
Add Remove													Add	Remove	
Comments	Com	nents													

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
Assigned to	[F4] prompt or by typing their code directly.
Required By	Enter a deadline date where possible as this enables other users to prioritise their
Required by	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
Completed	complete.
	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
Comments	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 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.

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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.

Sessions	Checklis	st Actio	ons 0	utcome A	ctions										
			Se	ssions Aff	er 21/10/201	3 Before	04/11/	2013	Site	HSS01	Venue			✓ Show Undated	
				Ту	pe	Subtyp	e		Owner		Title			Show Completed Sessions	
Sessions							E	vents [People						
Key	Date	Time	Site	Venue	٦	Title		Date	Site	RefLoc	Referrer			Examinations	Actions Compl
38	Unknown		HSS01	SV4	AED MSKU R	EPORTING W	3	10010	8501	HSS01AED	C911	B	ANKL		 Yes
26	Unknown		HSS01		ESHT MR RE	Remove all c	omplete	d events	3801	HSS01AED	C999	Å	XWRIL	XKNER	Yes
22	Unknown		HSS01	SV4	BUPA MRI QA	Mark As Con	nplete					1-0-			
20	Unknown		HSS01	OESM	EMMA'S PAED	b o oneor ne.									

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.

Sessions								Event	is	People	
Key	Date	Time	Site	Venue		Title	1000	Da	ite	Site	RefL
38	Unknown		HSS01	SV4	AED	MSKU REPORTING W	100	20/05/2	2012	HSS01	HSS01CH
26	Unknown		HSS01		ESH	T MR REPORTING WO		24/05/2	2012	HSS01	HSS01ME
22	Unknown		HSS01	SV4	BUP	A MRI QA	100	25/05/2	2012	HSS01	HSS01APF
20	Unknown		HSS01	OESM	EMM		18		1012	HSS01	HSS010P
						Remove all completed	eve	ents	012	HSS01	HSS01ME
						Mark As Incomplete			012	HSS01	HSS01AEI

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.

Sessions	Checklis	st Actio	ins 0	utcome A	ctions											
			Se	ssions Aft	er 21/10/2013	Before	04/11/2013	Site	HSS01	Ven	ue	1	Show Undated			
				Туј)e	Subtype		Owner	r []	Ti	ile		Show Completed Sessions			
Sessions							Events	People								_
Key	Date	Time	Site	Venue	Tit	le	Date	Site	RefLoc	Referre	er 🗌		Examinations	Actions	Compl	
38	Unknown		HSS01	SV4	AED MSKU REP	PORTING W	20/05/201	2 HSS01	HSS01CHIW	C920	. 🖪 🌛	XCHES	XABDO		No	
26	Unknown		HSS01		ESHT MR REPO	DRTING WO	24/05/201	2 00004	LICCOMMEDIA	0.080	m	VOLIDO			No	
22	Unknown		HSS01	SV4	BUPA MRI QA		25/05/201	Sessions		Þ	Remove From	Session			No	
20	Unknown		HSS01	OESM	EMMA'S PAEDS	CHEST RE	30/05/201	Mark as C	omnlete		Convito Sessi	on			No	
							01/06/201	Volume La	abel		Move to Sess	ion			No No	

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Field	Description							
	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.							
Remove from Session	Remove Events From Session? Image: Are you sure you wish to remove the selected events Image: Image: Image: 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.							
Move to Session	<u>Please note:</u> The original event / patient record will also remain on the original 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							

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

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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).

CRIS					CRIS Session	Management				-	×
Sessions	Checklist Actions Outcome Actions										
After	Before Site	Assig	ned To		Action	By	Show Completed				List
SessionDate	Title	EventKey	EventDate	Site	Ward		Examinations	Action	Assigned	Required	Load
30/11/2012	MDT CHEST	31663	29/11/2012	HSS01	HSS010PD	CSKUH		CNA	HSS	30/11/2012	Loau
30/11/2012	MDT CHEST	31663	29/11/2012	HSS01	HSS010PD	CSKUH		IT	HSSWOODB	30/11/2012	Print
30/11/2012	TESTING	2909	01/01/2099	HSS01	HSS01SAU	XCHES		BTR	HSSOSMAP	30/11/2012	
18/06/2013	MDT MEETING (TUES PM)	32101	03/04/2013	HSS01	HSS01AED	XABDO		CNA	BWTRAIN	18/06/2013	Done
13/06/2013	EMMA'S THURSDAY MEETING	31803	03/09/2013	HSS01	HSS010PD	CABDOC		BTR	XLMETCALFE	13/06/2013	00110
13/06/2013	EMMA'S THURSDAY MEETING	32195	25/04/2013	HSS01	HSS01AED	XANKL		CNA	ELE	13/06/2013	

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

ROGERS, Buck ()					Born 12/07/1972 (41y 3m) Sex	Male NHS 736 81	1 0946
Address 40 Buck Rogers' Street, Buck Rogers' A	Area, Buck Rogers' Town,	Contact 9088 962492	Ward Emergency Depart	ment/DR WHO 16/09/2	PAS 45221HSS	🚸 No alarms	۲
Action Ass CNA Collect Casenotes HS: IT PAS, RIS and PACS Access co HS:	signed To Required I 35 30/11/201 35W00DB 30/11/201	By 2 V Completed 2 V Completed		Comments	Add Remove		

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.

Sessions	Checklist A	ctions	Outcome A	ctions										
		5	iessions Af	ter 21/10/2013	Before 04	4/11/2013	Site	HSS01	Venue			Show Undated		Refresh
												Show Completed		New
			iy	pe	Suntype		Owner		Inte			Sessions		Save
Sessions						Events	People							Innet
Key	Date Tir	ne Site	Venue	Title		Date	Site	RefLoc	Referrer	1		Examinations	Actions Compl	Import
6 3	30/11/2012	HSSO	1 SV1	MDT CHEST		29/11/2012	HSS01	HSS010PD	C915		CSKUH		No No	Send
38	Unknown	HSSO	1 SV4	AED MSKU REPO	RTING WO	29/11/2012	HSS01 HSS01	GP GP	08334105		FBAEN		NO Ra No	Vet
26	Unknown	HSSO	1	ESHT MR REPOR	TING WOR	29/11/2012	HSS01	GP	G8334105		FBAEN		No	
						29/11/2012	HSS01	GP	G8334105		FBAEN		No	View
						29/11/2012	HSS01 HSS01	HSS010PD	0915	8 » (CSKUH XCHES		NO	Dictate
							,	,						
														Report
														Auto Load
														Add
										Sho	w Completed	I Events		Done
Section De	ntaile Chor	kliet Acti	one Out	anno Actione										
Action	etalis cilec	KIISCACU		Assigned To	Required	Bv					C	1		
Chu	Collect Cons			Lino	2044/204		Interal				comments	L		
	Collect case	notes		100	130117201	z 🕑 comp	leteu							
m	PAS, RIS and	I PACS A	ccess co	HSSWOODB	30/11/201	2 Comp	leted							
										L				
												Add Remove		
Comments														
II		_												

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

<u>ځ</u>					CRIS	Stats Viewe	er					- 🗆 💌
Date	Run : 21/10/2013				AC	TIONLIS	ST					Pag
Time	Run : 1437				Outstandi	ing Act:	ions List			Run	ву :	HSSSAVAE
CRIS No.	Name	Event key Site	Referring Locat	Session date	Title	Action code	Description	Assigned to	Required by	Completed date		
9313	GEMMA CHRISTINE TAYLOR	32103 H3301	H3301AED	24/10/2013	ESM CHEST MDT	CNA	Collect Casenotes					
22058	WELL BEING	32403 H3301	H330 LOPD	13/05/2013	EMMA'S THURSDAY MEET	MDT	Keep on list for next meeting					
18144	JOHN LEWIS	32872 H3301	H330LAED		AED MSKU REPORTING W	CNA	Collect Casenotes	ESMTRAIN				
21850	PETER PAN	31502 H3301	H330 LAED		AED MSKU REPORTING W	CNA	Collect Casenotes	ESMTRAIN				
21413	BUCK ROGERS	31553 H3301	H330L0PD	30/11/2012	MDT CHEST	CNA	Collect Casenotes	H33	30/11/2012	21/10/2013		
18549	ALAN STEPHEN WILSON	2909 H3301	H33013AU	30/11/2012	TESTING	BTR	Collect Blood Test Results	HSSOSMAP	30/11/2012	30/11/2012		
21413	BUCK ROGERS	31553 H3301	H33010PD	30/11/2012	MDT CHEST	IT	PAS, RIS and PACS Access confi	HSSWOODB	30/11/2012	21/10/2013		
18549	ALAN STEPHEN WILSON	2909 H3301	HSSOLSAU	30/11/2012	TEST ING	AR	Arrange Re Scan	PHIL IPS_TG	31/12/2012	30/11/2012		
21403	SCARLETT OHARE	31558 H3301	GP	30/11/2012	MDT CHEST	AR	Arrange Re Scan	PHIL IPS_NB	29/05/2013	29/11/2012		
12936	DOREEN AHMED	32101 H3301	HSS0 LAED	18/05/2013	MDT MEETING (TUES PM	MDT	Keep on list for next meeting	ESMTRAIN	11/05/2013			
21840	EMMA TEST	31803 HSS01	H33010PD	13/05/2013	EMMA'S THURSDAY MEET	BTR	Collect Blood Test Results	XLMET CAL FE	13/05/2013			
22015	DARTH VADER	32195 H3301	H330LAED	13/05/2013	EMMA'S THURSDAY MEET	CNA	Collect Casenotes	ELE	13/05/2013			
12936	DOREEN AMMED	32101 H3301	H330LAED	18/05/2013	MDT MEETING (TUES PM	CNA	Collect Casenotes	BUTRAIN	18/05/2013			
21379	PATIENT TEST	31373 H3301	H330L0PD	13/05/2013	EMMA'S THURSDAY MEET	GAMA	General Meeting Action (See Co	AUTRAIN	30/05/2013			
21879	ELENA AZZINI	32407 H3301	GP	11/07/2013	CHEST THURSDAY	CHC	Collect Hard Copy Film	ESMTRAIN	11/07/2013	09/07/2013		
21879	ELENA AZZINI	32407 H3301	GP	11/07/2013	CHEST THURSDAY	BTR	Collect Blood Test Results	ELE	11/07/2013			
21420	DARTH VADER	31812 H3301	H3301AED	12/02/2013	MDT - TUES PM	AR	Arrange Re Scan	ESMTRAIN	23/07/2013			
21935	JAMES BOND	32390 H3301	H330LAED	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	32751 H3301	GP	10/10/2013	EA TEST THURS	BTR	Collect Blood Test Results	EATRAIN	10/10/2013			
8578	KERRY DOREEN HARVEY	17551 H3301	H330LOPD	21/10/2013	TEST MDT	IT	PAS, RIS and PACS Access confi	RJNTRAIN	21/10/2013			
13550	DENNIS ALI	10919 H3301	H3301CHIW		EMMA'S PAEDS CHEST R	CNA	Collect Casenotes	EATRAIN	24/10/2013	17/10/2013		
13550	DENNIS ALI	10919 H3301	H3301CHIW		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.

Action	Assigned To Required By		Comments 1
CNA Collect Casenotes	ESMTRAIN Completed		All casenotes have been left in the Seminar room as requested.
			Add Remove
		Save	

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.

Sessions	Checklist Actions Outcome Actions									
After	Before Site	Assig	ned To		Action	By Show Completed				List
SessionDate	Title	EventKey	EventDate	Site	Ward	Examinations	Action	Assigned	Required	heol
30/11/201	2 MDT CHEST	31658	29/11/2012	HSS01	GP	FBAEN	AR	PHILIPS_NB	29/05/2013	Loga
30/11/201	2 TESTING	2909	01/01/2099	HSS01	HSS01SAU	XCHES	AR	PHILIPS_TG	31/12/2012	Drint
12/02/201	3 MDT - TUES PM	31812	12/02/2013	HSS01	HSS01AED	XCHES, XABDO	AR	ESMTRAIN	23/07/2013	TTIK
18/06/201	3 MDT MEETING (TUES PM)	32101	03/04/2013	HSS01	HSS01AED	XABDO	MDT	ESMTRAIN	11/06/2013	Clone
13/06/201	3 EMMA'S THURSDAY MEETING	32403	11/06/2013	HSS01	HSS010PD	CABDP	MDT		Unknown	olonio
13/06/201	3 EMMA'S THURSDAY MEETING	31373	23/07/2012	HSS01	HSS010PD	CABDO, CPELV	GAMA	AWTRAIN	30/06/2013	Done
Linknow	MEMMA'S PAEDS CHEST REPORTING LIST	10010	20/05/2012	HSS01	HSS01CHIM	YCHES YABDO	800	FATRAIN	31/10/2013	00/10





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</u> <u>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.

History	Q&A's Status	Sessi	ons Reso	urces	
Key	Date	Time	Site	Venue	Title
38	Unknown		HSS01	SV4	AED MSKU REPORTING WORKLIST

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.

Menu	Session																		
						(urrent Se	ssion	- Key : 20	Title : EMMA'S P	AEDS CHEST I	EPORTIN	G LIST						Defeash
									-										Refresh
			S	essions /	After 21/10/20	13 Before	04/11/2	013	Sit	e HSS01	Venue			Show	Undated				Done
							_	_						- Show	Completed				
					Туре	Subtyp			Owne	er	Title			✓ Sessi	ons				
Sessio	ns						Ever	ıts											
Key	Date	Time	Site	Venue		Title	D	ate	Site	RefLoc	Referrer			Examinations		Actions	Compl		
40	24/10/201	3 -	18801	SV3	ESM CHEST	MDT	20/05	2012	HSS01	HSS01CHIW	C920	8>	XCHES	XABDO		🛛 🔽	No		
38	Unknow	n F	19801	SV4	AED MSKU F	EPORTING W	24/05	2012	HSS01	HSS01MERW	C968	8	XCHES				No		
26	Unknow	n F	45501	01.14	ESHT MR RE	PORTING WO	30/05	2012	HSS01	HSS010PD	C920	8 🌛	XCHES				No		
22	Unknow	n F	18801	SV4	BUPAMRIG		01/06	2012	HSS01	HSS01MERW	C920	8 🃎	XCHES				No		
20	Olikuow		18801	UESIII	EMIMASPAE	JS CHEST RE	11/06	2012	HSS01	HSS01AED	C958	8 ≫ 🔜	XCHES				No		
							12/06	2012	HSS01	HSS01AED	C957	8 🌛	XCHES				No		
							12/06	2012	HSS01	HSS01APHW	C922	8.>	XCHES				No		
							12/06	2012	HSS01	HSS01AED	C957	🖪 ≫	XCHES				No		
							12/06	2012	HSS01	HSS01AED	C957	8.>	XCHES				No		
							12/06	2012	HSS01	HSS01DAYU	C922	8 🃎	XCHES				No		
							06/12	2012	HSS01	GP	G8334105	8	XCHES				No		
							20/03	2013	HSS01	HSS01AED	C911	8	XCHES				No		
							13/05	2013	HSS01	GP	G8334105	8	XCHES	XABDO	USULB		No		
							19/05	2013	HSS01	HSS01AED	C911	8	XCHES				No		
							04/05	2012	HSS01	HSS01APHW	C922	L 📎	XCHES				No		
							13/06	2012	HSS01	GP	G963	8.>>	XCHES				No		
							04/05	2012	HS801	HSS010PD	C922	🖪 🌛	XCHES				No		
							04/05	2012	HSS01	GP	G983	8.>	XCHES				No		
							01/06	2012	HSS01	HSS010PD	C922	8 🌛	XCHES				No		
							06/06	2012	HSS01	HSS01CHIW	C969	8 🄌	XCHES				No	-	
												🗆 S	how Completed	Events					

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.

Owner	HSSSAVAE	EMMA SAVAGE-MADY Public
Title	ESM CHEST MDT	
Site	HSS01	Healthcare Hospital
Venue	SV3	MDT Room
Туре	MDT	Multi Disciplinary Team Meeting
Subtype	MDT2	Chest MDT
Date	24/10/2013	Start Time End Time Stat Key

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**.

× Staff					
Search	Show All				
Login ID	UserID	Name	National ID	Group	Password Evning
COTRAINING	COTRAINING	OSHIKOYA Charles	Transfirm 12	SUPER.SYSADMIN	05/03/2016
CRISUSER	CRISUSER	crisuser		SUPER	01/12/2015 Now
CWTRAIN	CWTRAIN	WINFIELD Christine		SUPER	16/05/2014
DCTRAIN	DCTRAIN	David Costin		SUPER+APPTB+RECEPTT+RECEPTTAB+REP	07/09/2015 Delet
DHUNTER	DHUNTER	DAVE HUNTER		SUPER, RADIOL, RADIOG, APPT	16/03/2016
DLETRAIN	DLETRAIN	EVANS Darren		SUPER, RADIOL	05/01/2016
DLETRAIN2	DLETRAIN2	EVANS Darren2		RECEP,RADIOL,RADIOG,PORTR,HSS_SUPER	18/04/2013
DVTRAIN	DVTRAIN	VARDY Daniel		SUPER, SYSADMIN	05/01/2016
EATRAIN	EATRAIN	Elena Azzini		SUPER.HSS SUPERNV	19/06/2016
EJBSERVER	EJBSERVER	EJBSERVER		SUPER	27/05/2033
ELE	ELE	Elena Azzini		SUPER, SYSADMIN	12/09/2015
ELLENWE	ELLENWE	WENTWORTH Ellen		RADIOL, RECEP+STATS, SEC	06/04/2016
ELTRAIN	ELTRAIN	EMMA LUCAS		SUPER+HSS_MODRES+HSS_MODSES+HSS	12/03/2016
ESMTRAIN	ESMTRAIN	Emma Savage-Mady		SUPER+HSS_MODRES+HSS_MODSES+HSS	27/10/2015
GSTTRAIN	GSTTRAIN	Guys and St Thomas User		SUPER, RADIOL	12/12/2014
HATRAIN	HATRAIN	Harry Ambrose		SUPER, SYSADMIN+NUCMED	20/07/2015
HSS	HSS	HSS Support User		SUPER,RECEP	16/06/2015
HSS01	HSS01	Healthcare Hospital User		SUPER, RECEP, RADIOG+NUCMED, RADIOL, SE	12/09/2020
HSS01ESM	HSS01ESM	Emma Savage-Mady		SUPER	25/08/2015
HSS02	HSS02	Priory Road Hospital		SUPER.RECEP.RADIOG.RADIOL.SEC	19/09/2013
General Prefere	nces IButtons Roles				
	Login ID	EATRAIN	Use	ID EATRAIN	
	Name	Elena Azzini	Nation	al ID	
	Groups	Edit Groups	s	ites	
	Clinician	EATRAIN End Date	1	ype Unverified 7 Suspende	d O
	Secretary	EATRAIN End Date			
	Radiographer	EATRAIN End Date	Gr	ade	
	Clerical	EATRAIN End Date			
	Password	Enter Password	Ex	piry 19/06/2016	
	Valid From	Valid Befo	re Not loc	ked	

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.

General Preferences IButtons Roles				
Login ID	EATRAIN		User ID	EATRAIN
Name	Elena Azzini		National ID	
Groups	Edit Groups		Sites	
Clinician	EATRAIN	End Date	Туре	Unverified 7 Suspended 0
Secretary	EATRAIN	End Date		
Radiographer	EATRAIN	End Date	Grade	
Clerical	EATRAIN	End Date		
Password	Enter Password		Expiry	19/06/2016
Valid From	V	/alid Before	Not locked	

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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		New
HSS01	SV1	Meeting Room	Unknown		
HSS01	SV2	Seminar Room	Unknown		Save
HSS01	SV3	MDT Room	Unknown		
HSS01	SV4	Reporting Room 1	Unknown		Delete
HSS01	OESM	Dr Savage-Mady's Office	Unknown		
HSS01	EAO	Dr Azzini's Office	Unknown		Undo Delete
					Show End Dated
			Site	9 H5501	
			Code	9 SV1	
			Name	Meeting Room	
			End Date		

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.**

× NormalTables		
CRISLEAB	Code	Name
CRISLET	CRE	Contractual Reporting
	GM	General Meeting
	MDT	Multi Disciplinary Team Meeting
CRISLGTP	MWL	Modality Work List
	RES	Research
CRISLMPR	RWL	Reporting Worklist
CRISLNAB	TEA	Teaching
CRISLOC		
CRISLOG		

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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.

Table Entry	
Code MDT	
Text Multi Disciplinary Team Meeting	
	ļ
Table Settings	
Description MEETING TYPES	
✓ Preserve Local Values	
Edit Labels	

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	Туре	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.

Site	HSS01
Туре	MDT
Code	MDT1
Description	Breast MDT
End Date	

Field	Description
Site	Hospital where the subtype meeting will be held.
Туре	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.

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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	Туре	Requires Action	End Date
AR	Arrange Re Scan	0		Unknown
BTR	Collect Blood Test Results	С	V	Unknown
CANC	Cancel Event	0	V	Unknown
СНС	Collect Hard Copy Film	С	Ľ	Unknown
CNA	Collect Casenotes	C	Ľ	Unknown
GAMA	General Meeting Action (See Comments)	0	Ľ	Unknown
GPMA	General Pre Meeting Action (See Comments)	C	Ľ	Unknown
IT	PAS, RIS and PACS Access confirmed in room	C	Ľ	Unknown
MDT	Keep on list for next meeting	0	Ľ	Unknown
SCC	Return Casenotes to Centre	0	V	Unknown

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

Code	AR
Description	Arrange Re Scan
Туре	o
	✓ Requires Action
End Date	

Field	Description
Code	Unique code to identify the action.
Description	Task required to complete the action.
Туре	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 Trainir	ng 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 21/1		0/2013	Emma Savage-Mady	2.0 issue due to significant training documentation format	
				review in line with ISO 13	3485 and release of 2.09.10p.
V2.0	31/01/2014		Emma Savage-Mady	First Issue for 2.09.10p	
V2.1	2.1 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		

