# Quick Reference Guide - Worklist

1. Viewing a Worklist

A **Worklist** allows you to group together individuals. You can create a Worklist for your own specific requirements, and the list can only be seen by you. There are six blank Worklist categories that can be used to create the lists you may need.

- Log into the Connecting Care portal
- Click on **Worklists** on the left hand pane to view the categories as indicated below
- It can also be accessed in the **Common** section
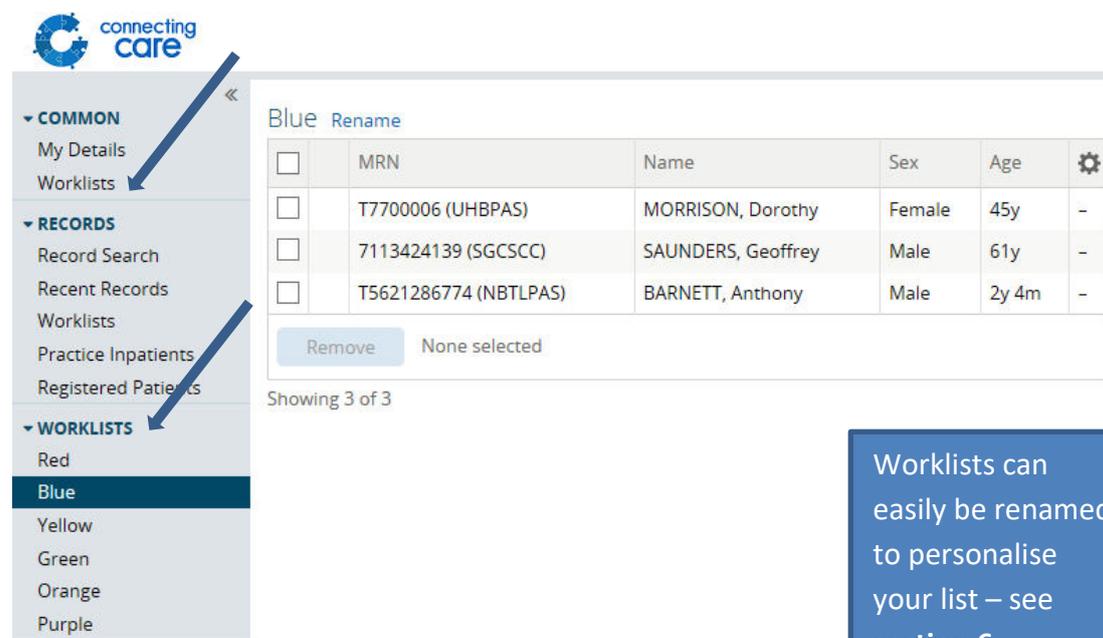
Worklists can easily be renamed to personalise your list – see **section 6**
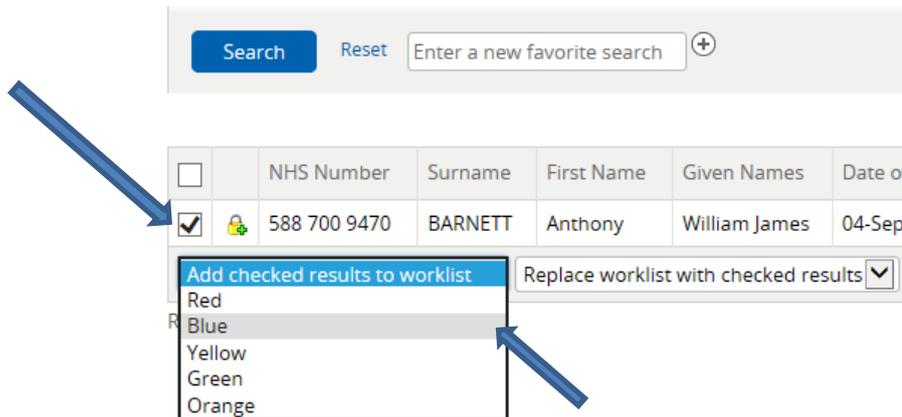
2. Adding an individual to a Worklist

There are two ways of adding a patient to a Worklist:

- From the result of a **Record Search**
- From the Banner within the **individual's record**

- **Using the Record Search Result**

To add an individual to a Worklist from a Record Search:

- Click **Record Search** on the left hand side panel to locate a person
- Click on the check box on the left to select the individual from the search results
- Click on the drop down next to **Add Checked Results to Worklist** as indicated below

By default all of the Worklists are pre-named using colours

- **Using the Banner**

The **Worklist** icon is located in the top left hand corner of the banner within the individual's record and is a plus **+** sign. To add an individual to a Worklist using the icon:

- Click on the icon on the banner to view available Worklists
- Click on chosen Worklist
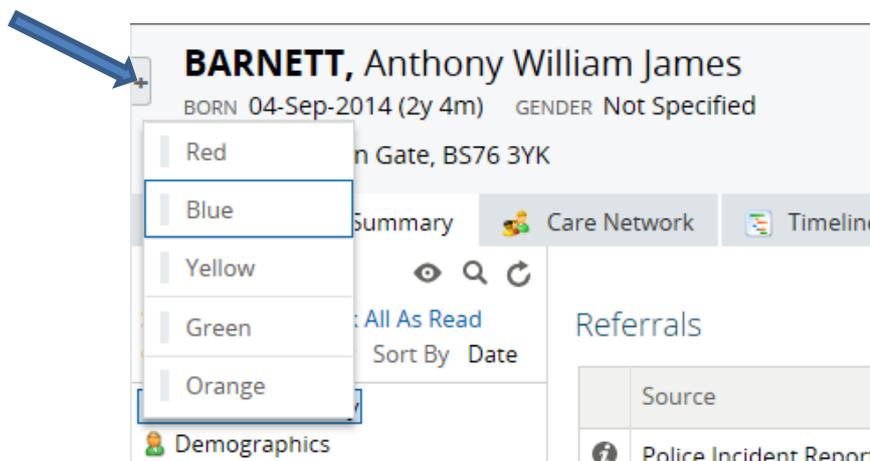
An individual can be on one or more Worklists therefore the first colour/name chosen will take precedent

If a patient is already on a Worklist the icon will reflect the chosen colour.

3. Renaming a Worklist

- Click on the '**Rename'** link next to the Worklist name

- Type in chosen name
- Click the **'Save'** link

A Worklist can be renamed to something more meaningful, e.g. Cardiology, Diabetes

4. Removing an Individual from a Worklist

- Select an individual(s) from the list by clicking the check box to the left
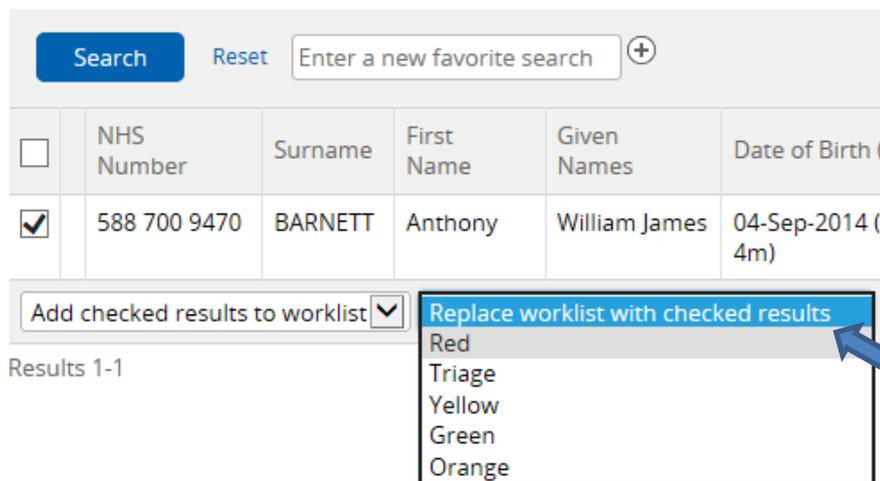- Click on the **'Remove'** button below the list

5. Replacing Individuals on a Worklist

You can replace the individuals on an existing Worklist from the results of a Record Search

- Click **Record Search** on the left panel to locate an individual
- Select the individuals to be included on the Worklist by clicking the checkboxes to the left of each name
- Select a Worklist from the '**Replace Worklist with checked results**' drop down.

N.B This action replaces all of the individuals on the Worklist with the names selected from the Search

For more information & support contact your local IT Helpdesk