1. Upon successful login to the database, the **Patients** screen is displayed as follows listing all patients within the database assigned to the current **Consultant**.

2. The main sections are the **Patients** tab, the **Dashboard** tab and the **Reports** tab (the **Reports** tab will be discussed in a subsequent User Guide).

3. Within the **Patients** Tab:

   3.1. The **Search** section allows a user to search for a patient by entering a single or combination of criteria. The user may enter:
   
   3.1.1. **First name**
   
   3.1.2. **Last name**
   
   3.1.3. **UR number**
   
   3.1.4. **Sex**
3.2. Select the Search option.

3.3. Where a patient is found, the patient is displayed on the Patients screen.

3.4. The Query function allows a user to enter text which is searched across all the search fields. This is the fastest way to find a patient as only the first few characters of their last name are required – e.g. entering ‘Cit’ will locate the patient ‘John Citizen’.

3.5. All patients are listed alphabetically displaying Name, Consultant, Hospital, UR Number, Sex, DOB (date of birth) and Postcode.

3.6. An existing patient may be edited by selecting the patient – refer to the Edit an Existing Patient guide.

3.7. A new patient may be added to the system by clicking the Add New Patient option – refer to the Add a New Patient guide.

4. The Dashboard tab shows the following:

4.1. Due Tasks are displayed to show tasks that are based on a timing event – e.g. after 30 days discharge from hospital, a Due Task is displayed for a patient to allow Readmitted after 30 Days data to be entered.

4.2. Outstanding Tasks – All patient records where data is missing or has not been entered is displayed in this section by Name and No. of Outstanding Tasks e.g. CITIZEN, Jane (5).
4.2.1. To view the outstanding tasks, click on the patient link and the tasks will be expanded.

<table>
<thead>
<tr>
<th>Outstanding Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITIZEN, Jane (5)</td>
</tr>
<tr>
<td>Start Preoperative for CITIZEN, Jane</td>
</tr>
<tr>
<td>Start Operative for CITIZEN, Jane</td>
</tr>
<tr>
<td>Start Postoperative for CITIZEN, Jane</td>
</tr>
<tr>
<td>Start Pathology for CITIZEN, Jane</td>
</tr>
<tr>
<td>Start Adjuvant Therapy for CITIZEN, Jane</td>
</tr>
</tbody>
</table>

4.2.2. Clicking on the link again will return the display to the previous view.

4.2.3. Clicking on a specific task link will take a user directly to the data screen in Edit mode, allowing the outstanding data items to be entered.

4.2.4. Where the task has been started and some data items are missing. Placing the mouse over the items icon will allow you to see the missing data items as follows.

4.3. Recent Patients are displayed and their records can be accessed by clicking on the patient link – refer to the Edit an Existing Patient guide.

4.4. Recent activity is listed and the patient record can be accessed by clicking on the activity link – refer to the Edit an Existing Patient guide.
5. User account details can be updated by clicking the Name of the user on the top right of the screen to display the Your Account screen as follows:

6. Select Edit Account to update the Email address or Change password as per the following screen:

7. Select Update Account to save any changes.
8. Select Cancel to cancel any changes.

9. Select Logout at the top right of the screen to exit the system.