Glasgow Clinical Trials Unit
NHS GG&C Clinical Research Facility

MANDATORY

GUI 57.001B: Creating and Sharing a Worklist on Clinical Portal v2.0

Worklists can be created on Clinical Portal to manage a group of patients. The patient health record can be accessed directly from the Worklist preventing the need to search for them each time. The Worklist can be shared with other Clinical Portal accounts.

Creating a Worklist

1. Ensure Worklist Manager is visible on portal account. If not available, contact IT and request it is added.
2. Click on Shared Worklist Manager.
3. Enter and **Name** and **Description** for your Worklist. Please note both fields must be the same.
4. Click **ADD.**

Adding a Patient to a Worklist

1. Click on **Home Page**.
2. Search for patient using CHI number, click **Search**.
3. Move the cursor to desired patient details until blue line appears highlighting row.
4. Click anywhere on the row to open patient record.
5. Select **Add to shared Worklist** icon 
6. Dialogue box will appear, detailing Worklists available for selection.
7. Select relevant Worklist.
8. Click **Save**. The patient will now be added to the selected Worklist.

Sharing a Worklist

1. Click on **Shared Worklist Manager**.
2. Select the Worklist to be shared.
3. Scroll to **Permissions - User ID** section.
4. Click the cross; enter first name and surname of user. Fields are case sensitive. Please note for Monitor/Audit access enter **Clinical Trial** in first name and **Monitor** as surname along with allocated number.
5. Click **Search** that person should appear below **User ID**.
6. Select user. User will now be able to view Worklist.

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1.0	14/03/16	Creation of Guidance document
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