Card List
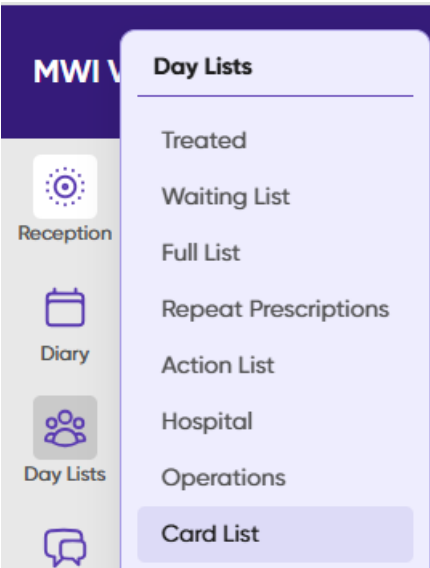
Summary

The Card List is used to manage the process of sending sympathy cards to owners. A diary column must be created in order to use this daylist.

Details

The Card List can be accessed via the 'Day Lists' button from Primary Navigation on the left-hand side.

Once selected, the Card List will display:

There are multiple ways to add a patient onto the Card List.

Adding a Patient to the Card List

Add to Card List - From Treatment Screen (Send to)

1. From the Treatment Screen, select the arrows in the top right of the screen. Select 'Send To' and select 'Card List'.
2. This will send the patient to the Card List for today's date.

Add to Card List - Dispensing Treatment

1. From the Treatment Screen, when adding a treatment, certain treatment codes can be configured to display a prompt to 'Send To Card List'.

2. Selecting 'Yes' to this prompt will send the patient onto the Card List for today's date.

Add to Card List - From the Diary Screen

In order to use this option, you will need to have a Card column setup in the Diary screen. Once this has been setup, you can add to the Card List via the Diary screen.

1. Navigate to the Diary screen and locate the 'Card column'.
2. Specify a 'reason' for the action and Save the 'appointment'.
3. The entry will display in the Diary screen and on the 'Card' Daylist.

Using the Card List

When selecting a patient from the Card List, right-clicking provides you with six options:

Function	Description / Function
Set Priority	Priority levels 1-10. If set, this block of colour will show in the first column in the Card List.
Set Card Created	Updates the status of the card to display progress of card creation. (This can also be done by selecting the patient and using the icon in the top left).
Set Card Sent	Updates the status of the Card to display card has been sent. (This can also be done by selecting the patient and using the icon on the top left).
Edit Appointment	Allows the user to edit the 'Appointment Reason'.
Delete Appointment	Allows the user to remove the appointment. This will remove from the Card List and Diary screen.

View Appointment Trail	Displays an audit trail for the selected 'appointment'.

Once a card has completed both steps, it will be removed from this list and will be shown when 'Show Sent Cards' is ticked.