

SystemOne QRG - Discharge Summary Physical Health - Completing To Do List Items

Introduction

- This user guide has been created to show system functionality not clinical processes and should be used in conjunction with the relevant Standard Operating Procedures (SOP) for your appropriate service
- Any changes will be updated and published online, and staff should be aware that any printed copies of the guide are only correct at the time of printing and should constantly check the online version for updates
- The following support materials are available from these locations:
[Course: Online System Resources \(cpft.nhs.uk\)](https://cpft.nhs.uk)
- When in SystemOne you can press F1 for Help (or choose Help on the Menu at the top of the screen)

Revision History

Revision date	Version	Summary of Changes	Author
02.07.2025	1	Initial Draft	Megan Moore

Approvals

Version 1.0 and above of document requires the following approvals:

Name	Title	Signature	Date	Version
George Griffiths	Lead Pharmacist – Digital Medicines Optimisation and EPMA	e-approved		1.0

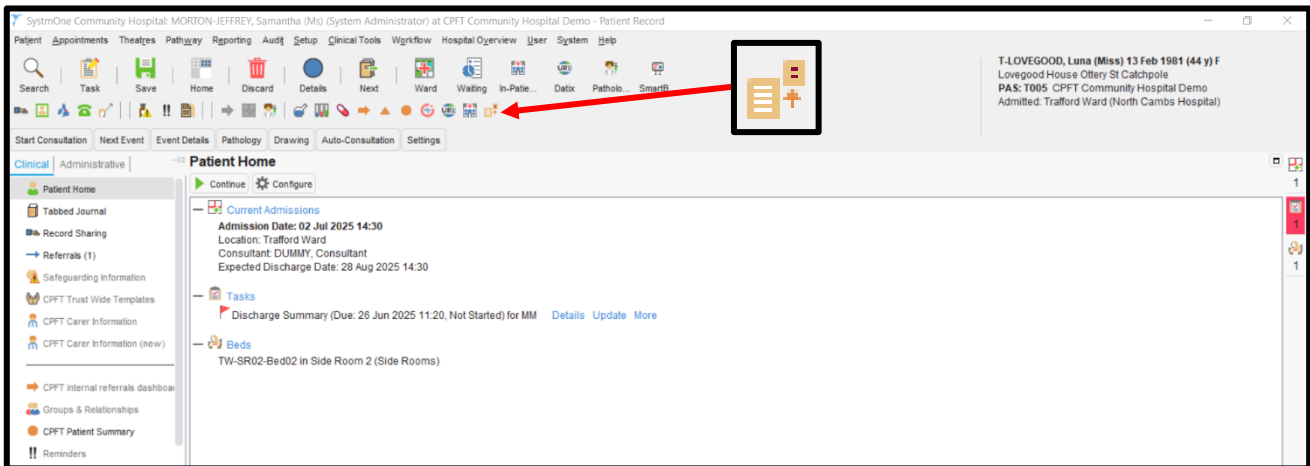
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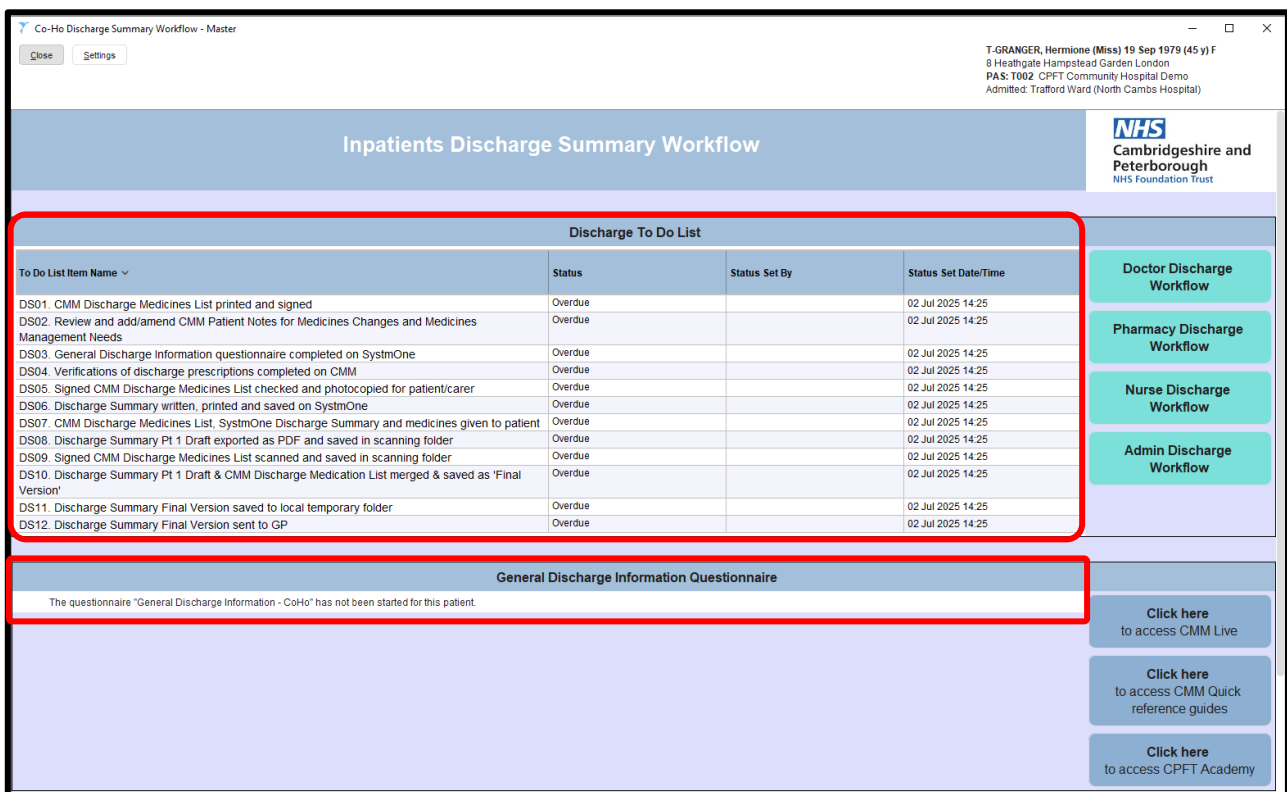
Opening the Inpatients Discharge Summary Workflow

This Quick reference guide provides instructions on how to navigate to the Discharge Summary Workflow and complete the Discharge To Do list items on SystmOne.

1. **Open** the patient in SystmOne then **click** on the Discharge Summary Workflow icon on the small toolbar.



2. The Discharge Summary Workflow home screen shows the status of all discharge To Do list Items on the left and links to role-specific workflows on the right. Once completed, the latest General Discharge Information Questionnaire appears below. Quick links to CMM Live and support tools are at the bottom right in dark blue.



Note: click on the To Do List Item name heading to sort the items into order (DS01 to DS11)

Click on the workflow for your job role to complete the To Do list items.

Inpatients Discharge Summary Workflow

Discharge To Do List

To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS01. CMM Discharge Medicines List printed and signed	Overdue		02 Jul 2025 14:25
DS02. Review and add/amend CMM Patient Notes for Medicines Changes and Medicines Management Needs	Overdue		02 Jul 2025 14:25
DS03. General Discharge Information questionnaire completed on SystmOne	Overdue		02 Jul 2025 14:25
DS04. Verifications of discharge prescriptions completed on CMM	Overdue		02 Jul 2025 14:25
DS05. Signed CMM Discharge Medicines List checked and photocopied for patient/carer	Overdue		02 Jul 2025 14:25
DS06. Discharge Summary written, printed and saved on SystmOne	Overdue		02 Jul 2025 14:25
DS07. CMM Discharge Medicines List, SystmOne Discharge Summary and medicines given to patient	Overdue		02 Jul 2025 14:25
DS08. Discharge Summary Pt 1 Draft exported as PDF and saved in scanning folder	Overdue		02 Jul 2025 14:25
DS09. Signed CMM Discharge Medicines List scanned and saved in scanning folder	Overdue		02 Jul 2025 14:25
DS10. Discharge Summary Pt 1 Draft & CMM Discharge Medication List merged & saved as 'Final Version'	Overdue		02 Jul 2025 14:25
DS11. Discharge Summary Final Version saved to local temporary folder	Overdue		02 Jul 2025 14:25
DS12. Discharge Summary Final Version sent to GP	Overdue		02 Jul 2025 14:25

General Discharge Information Questionnaire

The questionnaire "General Discharge Information - CoHo" has not been started for this patient.

- [Click here to access CMM Live](#)
- [Click here to access CMM Quick reference guides](#)
- [Click here to access CPFT Academy](#)

The role specific workflow will open in another window and will only display the relevant To Do list Items for the role selected. Each specific workflow screen will have different functions available.

Quick links – These will appear in a dark blue box. When clicked on they will take to other systems or external websites.

Inpatients Discharge Summary Workflow

Discharge To Do List

To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS01. CMM Discharge Medicines List printed and signed	Overdue		02 Jul 2025 14:25
DS02. Review and add/amend CMM Patient Notes for Medicines Changes and Medicines Management Needs	Overdue		02 Jul 2025 14:25
DS03. General Discharge Information questionnaire completed on SystmOne	Overdue		02 Jul 2025 14:25
DS04. Verifications of discharge prescriptions completed on CMM	Overdue		02 Jul 2025 14:25
DS05. Signed CMM Discharge Medicines List checked and photocopied for patient/carer	Overdue		02 Jul 2025 14:25
DS06. Discharge Summary written, printed and saved on SystmOne	Overdue		02 Jul 2025 14:25
DS07. CMM Discharge Medicines List, SystmOne Discharge Summary and medicines given to patient	Overdue		02 Jul 2025 14:25
DS08. Discharge Summary Pt 1 Draft exported as PDF and saved in scanning folder	Overdue		02 Jul 2025 14:25
DS09. Signed CMM Discharge Medicines List scanned and saved in scanning folder	Overdue		02 Jul 2025 14:25
DS10. Discharge Summary Pt 1 Draft & CMM Discharge Medication List merged & saved as 'Final Version'	Overdue		02 Jul 2025 14:25
DS11. Discharge Summary Final Version saved to local temporary folder	Overdue		02 Jul 2025 14:25
DS12. Discharge Summary Final Version sent to GP	Overdue		02 Jul 2025 14:25

General Discharge Information Questionnaire

The questionnaire "General Discharge Information - CoHo" has not been started for this patient.

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Action Buttons - These will appear as a turquoise button. When clicked on these will take you to other parts of SystemOne to allow you to complete the actions for a to do list item.

Action instructions – These will appear as plain text and provide instruction on completing an action on the workflow or outside of SystemOne.

Inpatients Discharge Summary Workflow - Admin

Discharge To Do List

To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS09. Signed CMM Discharge Medicines List scanned and saved in scanning folder	Overdue		02 Jul 2025 14:41
DS10. Discharge Summary Pt 1 Draft & CMM Discharge Medication List merged & saved as 'Final Version'	Overdue		02 Jul 2025 14:41
DS11. Discharge Summary Final Version saved to local temporary folder	Overdue		02 Jul 2025 14:41
DS12. Discharge Summary Final Version sent to GP	Overdue		02 Jul 2025 14:41

Discharge Letters

Date/Time	Type	Date/Time Completed ...	Sender	Recipient	Document Title	Flags
03 Jun 2025	Discharge Summary Final Version	25 Jun 2025 09:36	CPFT Community Hospital Demo	Miss Romilda T-Vane		

Action Instructions (DS08-DS12):

- DS08:** Right click on the Discharge Letters table to Export PDF
- DS09:** Confirm signature on CMM DC Meds List, then scan & save to scanning folder
- DS10:** Click here to action in Acquired Documents exported as PDF and saved
- DS11:** Right click on the Discharge Letters table to save a copy
- DS12:** Click here to send task to GP

Completion Buttons (DS08-DS12): Click here to mark as completed

Completion Buttons – These green buttons allow you to mark to-do list items as complete. Follow the steps below to see how to use them.

Completing To Do List Items

1. Once an item has been actioned **click** on the green button to mark as complete.

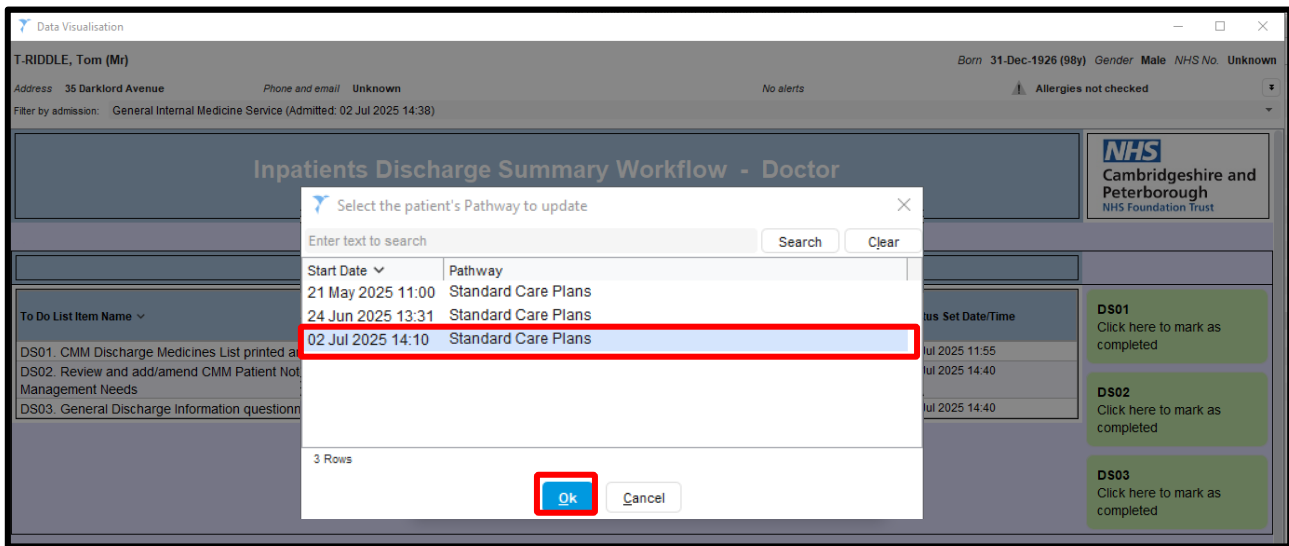
Inpatients Discharge Summary Workflow - Doctor

Discharge To Do list items table (shows tasks due and completed)

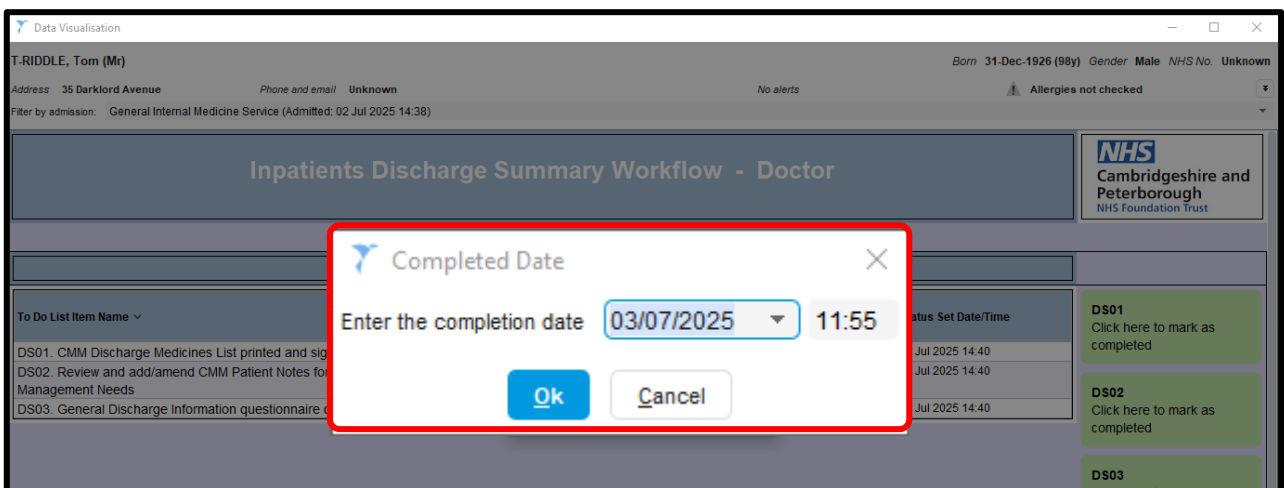
To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS01. CMM Discharge Medicines List printed and signed	Overdue		02 Jul 2025 14:40
DS02. Review and add/amend CMM Patient Notes for Medicines Changes and Medicines Management Needs	Overdue		02 Jul 2025 14:40
DS03. General Discharge Information questionnaire completed on SystemOne	Overdue		02 Jul 2025 14:40

Completion Buttons (DS01-DS03): Click here to mark as completed

2. **Select** the Patient pathway (If more than one, select the most recent date) and **click ok**.



3. The current date and time will be entered for the completion details. This can be amended if required. **Click Ok** to confirm.



4. The Discharge To Do List table will automatically update the status to complete and will show who completed the task and when.

Discharge To Do list items table (shows tasks due and completed)			
To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS01. CMM Discharge Medicines List printed and signed	Complete	MOORE, Megan	03 Jul 2025 11:55
DS02. Review and add/amend CMM Patient Notes for Medicines Changes and Medicines Management Needs	Overdue		02 Jul 2025 14:40
DS03. General Discharge Information questionnaire completed on SystemOne	Overdue		02 Jul 2025 14:40

5. Once the To Do list Items have been actioned and marked as complete you will need to **save** the Patient record. To Do this **close** the role specific workflow and the main inpatient discharge summary Workflow by **clicking X**.

Inpatients Discharge Summary Workflow - Doctor

To Do List Item Name	Status	Status Set By	Status Set Date/Time
DS01. CMM Discharge Medicines List printed and signed	Complete	MOORE, Megan	03 Jul 2025 11:55
DS02. Review and add/amend CMM Patient Notes for Medicines Changes and Medicines Management Needs	Overdue		02 Jul 2025 14:40
DS03. General Discharge Information questionnaire completed on SystmOne	Overdue		02 Jul 2025 14:40

DS01
Click here to mark as completed

DS02
Click here to mark as completed

DS03
Click here to mark as completed

6. Once all additional windows are closed you can then Save the patient record by **clicking** on the Save icon.

Save

T-RIDDLE, Tom (Mr) 31 Dec 1926 (98 y) M
 35 Darkford Avenue CPFT Community Hospital Demo
 Admitted: Trafford Ward (North Cambs Hospital)

Current Admissions
 Admission Date: 02 Jul 2025 14:38
 Location: Trafford Ward
 Consultant: DUMMY, Consultant
 Expected Discharge Date: 21 Aug 2025 14:39

Beds
 TW-SR01-Bed01 in Side Room 1 (Side Rooms)