## HOW TO SELECT WHICH CONSULTATIONS TO PUT IN A DOCUMENT

When creating a referral letter or discharge, we often need to include previous consultations in the letter.

First of all, you need to create your letter by clicking the **Add** dropdown button, scrolling down to **Document**, then selecting Create Letter.



The **New Patient Letter** pop-up box will appear, offering you to create a New Document (from scratch), a list of frequently used document templates, and a search button () if the template you want to use is not shown.



Once you have opened your chosen template, you can add previous consultations by selecting **Clinical Content** from the left hand menu, then double clicking the **Consultations** option.

(Please make sure you delete any consultations that have been pulled through on the template)



When you do this, the following **Consultations Table** pops up.

Consultations Table	:	X
Please enter the det	ails for the consultations table below.	
Table Details		
Display table title	Consultations	
No results found	Isplay table title only	
	C display nothing	
	$^{\bigcirc}$ display the title and the following text:	
	No consultations recorded.	
Table borders		
Column Headings		
Consultation Det	ails	
O AI		
○ In the past	Days 💌	
<ul> <li>Include the last</li> </ul>	3 consultations in the past Days	
	OK OK and Select Cancel	

Here you can specify whether to include all consultations, consultations in a set period of time (e.g in the past 7 days), or a set number of consultations (e.g. the last 3 consultations).

Sometimes however, we may want to hand pick which consultations go into our document. To do so, rather than click OK, click **OK and Select**...



Now you can select whichever consultations you wish to go into the document. Check the tick boxes to select the consultations you need.

Consul	tations				X
Speci	fic items have been chose		Reset		
	Date	Consultation Text			
	22-Mar-2019 15:11	Administration note (KINGSTON HEALTH CENTRE) LINSELL, Jak (Mr)			
	Examination	O/E - blood pressure reading 140/90 mmHg • O/E - pulse rate 80 beats/min O/E - pulse rhythm regular • O/E - height 180 cm • O/E - weight 76 kg • Body mass index 23.5 kg/m2	•		
	Comment	DFGHJKL			
	04-Mar-2019 13:37	Administration note (KINGSTON HEALTH CENTRE) LINSELL, Jak (Mr)			
	Examination	O/E - blood pressure reading 120/80 mmHg • O/E - pulse rate 90 beats/min O/E - pulse rhythm regular • O/E - height 180 cm • O/E - weight 64 kg • Body mass index 19.8 kg/m2 • Ideal weight 74.5 kg • Alcohol consumption 0 U/week • Teetotaller • Body mass index 19.8 kg/m2 • Diabetic annual rev	• riew		
	Additional	Physical activity opportunity signposted			
	Family History	FH: Diabetes mellitus			
	Assessment	Never smoked tobacco • Mental health annual physical examination done			
	Follow up	Diary Entry Diabetic annual review (04-Mar-2019 13:37)			
		Diary Entry Medication review due (04-Mar-2019 13:37)			
	Comment	Medication review with patient • No follow-up NOS			
	04-Mar-2019 13:11	Administration note (KINGSTON HEALTH CENTRE) LINSELL, Jak (Mr)			
	Comment	Type 2 diabetes mellitus			
	18-Jan-2019 14:58	GP Surgery (KINGSTON HEALTH CENTRE) HUNT, Cassie (Miss)			
	Procedure	Dressing of ulcer • Dressing of ulcer			
	Assessment	O/E - Wound healing well • Skin ulcer swab taken			
	15-Jan-2019 18:07	KINGSTON HEALTH CENTRE HUNT, Cassie (Miss)			
	Comment	Influenza vaccination invitation first SMS text message sent			
		Patient mobile telephone number 07432680111			
		SMS text message sent to patient			•
		OK		ance	el

When you have finished selecting, click **OK**.

You will now see your selected consultations in your document.

Consultations	
Date	Consultation Text
22-Mar-2019 15:42	GP Surgery (KINGSTON HEALTH CENTRE) LINSELL, Jak (Mr)
Comment	Suicide risk assessment High suicide risk 9
04-Mar-2019 13:37	Administration note (KINGSTON HEALTH CENTRE) LINSELL, Jak (Mr)
Examination	O/E - blood pressure reading 120/80 mmHg • O/E - pulse rate 90 beats/min • O/E - pulse rhythm regular • O/E - height 180 cm • O/E - weight 64 kg • Body mass index 19.8 kg/m2 • Ideal weight 74.5 kg • Alcohol consumption 0 U/week • Teetotaller • Body mass index 19.8 kg/m2 • Diabetic annual review
Additional	Physical activity opportunity signposted
Family History	FH: Diabetes mellitus
Assessment	Never smoked tobacco • Mental health annual physical examination done
Follow up	Diary Entry Diabetic annual review (04-Mar-2019 13:37) Diary Entry Medication review due (04-Mar-2019 13:37)
Comment	Medication review with patient • No follow-up NOS
18-Jan-2019 14:58	GP Surgery (KINGSTON HEALTH CENTRE) HUNT, Cassie (Miss)
Procedure	Dressing of ulcer • Dressing of ulcer
Assessment	O/E - Wound healing well • Skin ulcer swab taken