


# Managing local information in the Map of Medicine

## Selecting and managing local administrative information

The types of local administrative information that you might add to pathway page node's **Quick info** panel include local guidelines, protocols, professional development opportunities, contacts for referrals, waiting times, and any other information that will help ensure a smoother patient care journey.

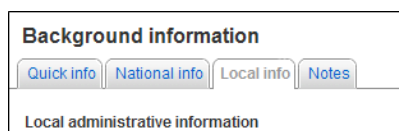
This level of localisation is a quick way to make the pathway more relevant to all users in your local healthcare community. You should never add any information to a node related to a specific patient or that would allow a user to identify a specific patient.

## Add local administrative information to a node


- Go to the pathway that contains the node you want to add local administrative information to.
- Select the node.  
The **Quick info** panel for the node opens.
- Select the **Add local info node** link in the **Quick info** panel.
- In the local administrative information text editor, read the **Guidance Notes** to ensure that your information meets the criteria for the type of information you should add to nodes.
- Type your local administrative information in the text field. You can format the text you add using the available formatting tools.
- When you have typed your local administrative information and are satisfied with the content and formatting, select the **Save** link.  
Map of Medicine saves your information and displays it in a new **Local info** tab in the **Quick info** panel. The node now has a local info icon  indicating that it contains local administrative information.

## Edit local administrative information on a node

- Go to the pathway that contains the node you want to edit local administrative information for.
- Select the node with local information that you want to edit.  
The **Quick info** panel for the node opens.
- Select the **Local info** tab in the **Quick info** panel.  
The **Local info** tabs shows the existing local administrative information.
- Select the **Edit local admin info** link.  
The panel expands to show the local administrative information text editor.
- Edit your local administrative information in the text field.
- When you have typed your local administrative information and are satisfied with the content and formatting, select the **Save** link.  
Map of Medicine saves your information and updates it in the **Local info** tab in the **Quick info** panel.



## Revert to inherited local administrative information

 The **Revert** link only appears in the Local admin info editor panel if there is local administrative information available to revert to in the parent view from which your view inherits.

- Go to the pathway that contains the node on which you want to revert the local administrative information.
- Select the node for which want to revert the local administrative information.  
The **Quick info** panel for the node opens.
- Select the **Local info** tab in the **Quick info** panel.  
The **Local info** tabs shows the existing local administrative information.
- Select the **Edit local admin info** link.  
The panel expands to show the local administrative information text editor.
- Select the **Revert** link at the bottom left side of the panel.  
The panel updates to show the information your current information and the information you will revert to.
- Select the **Revert** link at the bottom right side of the panel.  
A dialog box appears asking you to confirm that you want to revert the local administrative information.
- Click **OK**.

## Dealing with 'orphaned' local administrative information

If a node that you have added local administrative information to is deleted from a pathway in a view above yours, the node and your local information will no longer be available to users in your view--it is 'orphaned'. If the information is still relevant in your local healthcare community, determine whether you can add it to another node in the pathway or a node in a related pathway. You cannot recover local administrative information if the node that it was attached to is deleted.

Make sure that you also have all of your local administrative information recorded somewhere outside of the Map of Medicine. You can print the **Local admin report** available in the Map to track and manage the local administrative information.

## Generate a Local admin report

- From any page in the Map of Medicine, select the **Admin report** link at the top of the page.  
The **Local admin report** page appears.
- From the first drop-down list, select the department that you want to generate a Local admin report for.
- From the second drop-down list, select the specialty.
- From the third drop-down list, select the pathway.
- Click **Go**.  
The **Local admin report** page appears. You can navigate to nodes with local information using the links in the report.
- Select the **View All** link to show the whole report on one page.
- To print the report, click the **Print Page** button.
- Configure your print options in the **Print** dialog box.  
The report prints on your specified printer.

# Managing local information in the Map of Medicine


## Localising and managing referral forms in your view

Before you can manage the referral forms in Map of Medicine, you must save your locally-created referral form document to a server that has a publicly-accessible URL. In Map of Medicine, you add a link to this URL to enable users to access your local referral form. Map of Medicine does not actually host the local referral forms on its servers.

Remember that referral forms hosted on an intranet site (instead of a publicly-accessible Internet site) will only be available to users with permission to access that intranet site and might not be available to all users in your view.


## Add information for a locally-added referral form

1. On the **Referral information** page, select the **Add new information or form** link at the bottom of the page. The **Add referral information** page appears.
2. Type the title and description associated with the referral form, being sure to follow the guidelines indicated on the page.
3. Type the URL of the location where the referral form is hosted.

 Remember to include the full URL to the location where the referral form is hosted so that it accessible to all users, even those without access to your local network.

4. Click **Submit**.  
Map of Medicine saves your information and returns you to the referral information page. The referral form that you added appears in the **Case-specific referral information** section.

## Localise an inherited referral form

1. On the referral information page, select the **Edit** link for the referral form that you want to localise. The **Edit referral information** page appears.
2. If necessary, edit the title and description associated with the referral form, being sure to follow the guidelines indicated on the page.
3. If necessary, edit the URL of the location where the referral form is hosted.
4. Click **Submit**. Map of Medicine saves your information and returns you to the referral information page. The referral form that you edited now has a localised icon:  indicating that you have changed it from the inherited version.

## Referral form formats

Referral forms must be in HTML, TXT, DOC, or PDF format in order to link to them in the Map of Medicine. Remember that only users with Acrobat Reader already installed on their computers can read PDF forms without first downloading and installing the software and only users with Microsoft Word or a compatible application will be able to open referral forms in DOC format.


## Generate a list of available referral forms for a speciality

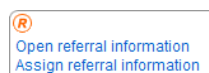
1. From any page in the Map of Medicine, select the **Referral info** link at the top of the page. The **Referral information** page appears.
2. From the first drop-down list, select the department that you want to see referral forms for.
3. From the second drop-down list, select the speciality within that department that you want to see referral forms for.
4. Click **Go**. The referral information page for your selected speciality appears.

## Generate the referral info usage report

1. On the referral information page, there are two ways to generate the referral info usage report:
  - Select the **Usage report** link at the bottom of the page.
  - Select the **Nodes linked to this item:** link for a referral form.
 The **Referral info usage report** page appears.
2. Use the referral info usage report to perform the following additional tasks:
  - To view a referral form listed in the usage report, select the referral form title link. The referral form opens in a new browser window.
  - To view the pathway that contains the referral node a referral form is associated with, select the pathway hierarchy link. The selected pathway appears.
  - To view the referral information for a different speciality, select the department and speciality from the drop-down lists and click **Go**. The referral information page for that speciality appears.

## Assign a referral form to a pathway referral node

1. Go to the pathway that contains the referral node you want to associate with a referral form.
2. Click the **Referral** icon:  on the node. The icon expands to show available action links:



- **Open referral information:** selecting this link opens the referral form in a new browser window
  - **Assign referral information:** selecting this link opens the **Select Referral Form** dialog box
3. In the **Select Referral Form** dialog box, from the drop-down list, select referral form that you want to assign to the referral node.

**Select Referral Form**

Please select the referral form to be used on this node

By clicking Save, a link to the selected form is created in this local view. You will no longer inherit changes to the assignment of forms to this node.

Colorectal Cancer Referral form (2 week wait)

Cancel
Save

4. Click **Save**. Map of Medicine updates the referral form assignment for the node.