



Contents

Diary Overview	1
Booking a Diary Appointment	3
Booking a Diary Appointment with an Additional HCP	4
Adding Intended Activities to an Appointment	4
Booking Repeat Appointments	5
Booking an Appointment for Multiple Clients	6
Booking an Appointment for Multiple Family Members	6
Printing a Diary List.....	7
Outcoming a Diary Appointment	8
Cancelling a Diary Appointment	10
Outcoming as a Did Not Attend (DNA)	11
Rescheduling An Appointment	12
Group Activities	13
Other Activities	15

Diary Overview

The Diary is used by a Health Care Professional to book their Community Appointments for their Clients. It can also be used to record time spent writing clinical documents/admin duties.

Located on the left of the screen you will see **Current Selection/Change Selection**.

Current Selection

HCP: [ASTON, Deidre](#)
Date: ← 17 Feb 2021 →
Day: Wednesday
Week: 7

Change Selection

HCP:
Date:

HCP: whose diary is currently displaying.

Date: date of currently displayed day which can be changed using the backward/forward arrows.

Week: current week of the Year.

HCP: use the drop-down list to select a different HCP.

Date: use the calendar to view another date, the calendar with red date indicator inserts today's date.

When the date and/or the HCP have been changed you will need to update the HCP diary screen

- To **update** the diary, click **Go**



Comments

Complete mileage claim

Below the **Current Selection/Change Selection**, you will see **Comments**

Comments may be used as an aide memoire and is visible to the whole team; remember not to use this for Client details. Any Comments entered will only display on the specific day.

- Enter any required Comments
- Click **Save**

Appointment Scratch Pad

TALBOT, Jerry (Mr)

16 Jul 2013 08:00

Key

Team Planner	HCP Diary
Clinic	Unscheduled

The **Appointment Scratch Pad** is located at the bottom left of the Diary along with its own key.

Client Jerry Talbot has been placed onto the scratchpad ready to be rescheduled to another appointment.

The Diary has 3 views **Daily**, **Weekly** & **Monthly** to accommodate all user preferences. The Diary times are set up according to the individual service requirements and the colours used are all according to Trust standards.

The top right of the Diary screen allows the user to select whether they wish to use the visual indicators.

HCP: ASTON, Deidre

Visual Indicators

- Select the **Visual Indicator checkbox** (top right) to display

Community Appointment

Working Hours	Daily Team Allocated	Outside Hours
Monthly Team Allocated	Past Unoutcomed	

Clinic Appointment

Working Hours	Outside Hours	Past Unoutcomed
---------------	---------------	-----------------

This displays a code in the Appointment key (bottom).

Once the user is familiar with the colour coding, the key can be hidden by clicking on the grey triangle which is located above the key.

[To-Do List](#)
[Team Caseload](#)
[Caseload](#)
[Referral List](#)

you directly to other Rio functionalities

At the bottom of the screen, there are useful **hyperlinks** which take



Booking a Diary Appointment

- Check your **Current Selection** displays the date you wish to book the appointment for
- Click on a displayed time (e.g., 09:00)

This will take you directly to the **Search** screen to insert the Client's details.

The **Book HCP Appointment** screen displays. Please note that all pink/lilac fields are mandatory and **must be** completed.

Date	25 Feb 2021	Time	09:00	Intended Duration	30 minutes	Location	Clients Home
HCP	ASTON, Deidre	Urgency	Routine	Type	First Appointment	Comments Client is in a wheelchair	
Carer Appointment	<input type="checkbox"/>	Face-to-face Contact	<input checked="" type="checkbox"/>	Transport Required	<input type="checkbox"/>		

Client(s)
Additional HCPs
Intended Activities
Repeat Appointments

Client ID	Client	Relationship to Client	Referral	Transport	Interpreter Required	Proxy Contact	Comments
1000616	TAYLOR, Eddie (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (COTTERIDGE, K	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Book
[Close Booking](#)

- **Date:** (auto fills)
- **Time:** (auto fills)
- **Intended Duration:** (auto fills)
- **Location:** Select as appropriate
- **Type:** Select as appropriate
- **Urgency:** Select as appropriate
- **Face to Face Contact:** Select as appropriate in accordance with Type
- **Comment:** If required

Client(s)
Additional HCPs
Intended Activities
Repeat Appointments

The **Client(s)** tab displays the **Client ID & Name**. The **Referral** field is mandatory; you will be unable to book an appointment without a referral to your service.

- Click **Book** (bottom)

When you return to the Diary screen, the booked appointment will display.

09:00 - 09:30
TAYLOR, Eddie (Mr)
Clients Home
First Appointment
To Outcome



Booking a Diary Appointment with an Additional HCP

Follow the instructions for Booking a Diary Appointment to the **Client(s)** tab, but don't book the appointment.

- Click the **Additional HCPs** tab
- Scroll to view the lower part of the screen
- Click **Please Select** drop-down (right) to locate the HCP
- Select the required HCP from the list
- When the Additional HCP name is visible, click **Add HCP**

Client(s) Additional HCPs Intended Activities Repeat Appointments

Please Select ▼

BLACK, Jacob ▼

Add HCP

HCP Name	Client(s)
BLACK, Jacob	TAYLOR, Eddie (Mr)

The **Additional HCP** has now been added to the Appointment and the booking will appear in their Diary.

Adding Intended Activities to an Appointment

You may add Intended Activities to the Appointment at the time of booking if they are known, alternatively you can add them when outcoming the Appointment.

Complete the booking process to the **Client(s)** tab

- Click the **Intended Activities** tab
- Check the **Activities** intended to be carried out at the Appointment
- Click **Add**

Client(s) Additional HCPs Intended Activities Repeat Appointments

<input type="checkbox"/> *Double-Up - Manual Handl...	<input type="checkbox"/> A&E Attendance
<input checked="" type="checkbox"/> Advice	<input checked="" type="checkbox"/> Assessment
<input type="checkbox"/> Catheter Care	<input type="checkbox"/> Compression bandaging
<input type="checkbox"/> Dietary Advice	<input type="checkbox"/> End of Life Care
<input type="checkbox"/> Home Assessment	<input type="checkbox"/> Immunisation given
<input type="checkbox"/> Pain Management	<input type="checkbox"/> Palliative - Symptom Cont...
<input type="checkbox"/> Treatment	<input type="checkbox"/> Wound Care - Simple (Mult...

Client	Activities	HCP	Main?	<input type="checkbox"/>
TAYLOR, Eddie (Mr)	Advice	ASTON, Deidre	<input checked="" type="radio"/>	<input type="checkbox"/>
TAYLOR, Eddie (Mr)	Assessment	ASTON, Deidre	<input type="radio"/>	<input type="checkbox"/>

The **Intended Activities** are now added to the Appointment



Booking Repeat Appointments

You may wish to add a series of Appointments at the same time on a daily/weekly or monthly basis. This can be done using **Repeat Appointments**

Complete the booking process to the **Client(s)** tab

- Click the **Repeat Appointments** tab



Allow Repeat Bookings:



Appointment Type:

Select as required

Frequency Daily/Weekly/Monthly/Yearly:

Select appropriate

Recur every:

Select as required

Mon/Tue/Wed/Thu/Fri/Sat/Sun:

Select the required day/days

End After? Total No of Repetitions:

Number of Appointments needed

or

End By:

Select date of last appointment

Allow Repeat Bookings Appointment Type: Follow-Up Appointment

Frequency: Daily, Weekly, Monthly, Yearly

Recur every: 1 week(s) on

Monday Tuesday Wednesday
 Thursday Friday Saturday
 Sunday

End After: 3 Total No. of Repetitions

End By: 25 Feb 2021

Client/HCP Name Group	Booking Date
▲ TAYLOR, Eddie (Mr) - 1000616	<input checked="" type="checkbox"/> 25 Feb 2021 10:30
	<input checked="" type="checkbox"/> 4 Mar 2021 10:30
	<input checked="" type="checkbox"/> 11 Mar 2021 10:30
	<input checked="" type="checkbox"/> 18 Mar 2021 10:30

The lower part of the booking screen lists the proposed repeat booking dates if these are acceptable

- Click **Book**



Booking an Appointment for Multiple Clients

Rio will allow you to book an Appointment for more than one Client at the same time.

Follow the instructions for Booking a Diary Appointment to the **Client(s)** tab.

- Click **Add Client** (lower right)

This takes you directly to the **Client Search** screen.

Complete the **Search** criteria for the Client that needs to be added.

- Click **Search**
- Select the correct Client from the **Search Results** screen

The second Client & their referral has now added to the booking.

Client ID	Client	Relationship to Client	Referral	Transport	Interpreter Required	Proxy Contact	Comments	
1000613	FOSTER, Rodger (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (15 Jul 2013 00:)			<input type="checkbox"/>		<input type="checkbox"/>
1000616	TAYLOR, Eddie (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (COTTERIDGE, K			<input type="checkbox"/>		<input type="checkbox"/>

- Click **Book**

Booking an Appointment for Multiple Family Members

Follow the instructions for Booking a Diary Appointment to the **Client(s)** tab.

- Click **Add Client** (lower right)

This takes you directly to the **Family Members** screen where any of the first Client's family can be chosen, providing they also have a referral to your Service.

- Click **Referred**
- Select the appropriate **Referral** from the available list

Client	Participant	Not Invited	Invited	Referred	Referral
TAYLOR, Eddie (Mr)	TAYLOR, Baby (Master)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Referral Not Required
TAYLOR, Eddie (Mr)	TAYLOR, Miriam (Miss)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Referral Not Required
TAYLOR, Eddie (Mr)	TAYLOR, Willemena (Mrs)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	GENERAL MEDICINE (Birmingham Healthcare (15 Jul 201: X

- Click **Add Client(s)**

Client ID	Client	Relationship to Client	Referral	Transport	Interpreter Required	Proxy Contact	Comments	
000046	TAYLOR, Willemena (Mrs)	Partner (1000616)	GENERAL MEDICINE (Birmingham Healthcare (15 Jul 2013 09:)			<input type="checkbox"/>		<input type="checkbox"/>
000616	TAYLOR, Eddie (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (COTTERIDGE, K			<input type="checkbox"/>		<input type="checkbox"/>

- Click **Book**

09:00 - 09:30	TAYLOR, Willemena (Mrs)	Clients Home	First Appointment	To Outcome	
	TAYLOR, Eddie (Mr)			To Outcome	

All the Client(s) will then display in the booked appointment



Printing a Diary List

Rio will allow you to print a list of your Diary Appointments if you are required to do so.

Click

Click

Click

Start Date & Time: Select as required

End Date & Time: Select as required

HCP's Name: Select as required

- Click **OK**

Printable HCP Diary

Start Date	<input type="text" value="25 February 2021 07:00"/>	
End Date	<input type="text" value="25 February 2021 18:00"/>	
HCP	<input style="border: 1px solid #ccc;" type="text" value="Aston, Deidre"/>	

The **Printable HCP Diary** for the HCP on that date and within the specified time period now displays

Printable HCP Diary									
Run Time: 4 Mar 2021, 13:55			RIO Instance: TRAIN04 (Live)			Logged in User: BCHC01 (Deidre Aston)			
Parameters: Start Date = 25 February 2021 07:00, End Date = 25 February 2021 18:00, HCP = Aston, Deidre									
Record Count: 5 records returned									
Name	Address	Postcode	Date of Birth	Appointment Date	Intended Time	Location	Referral Reason	Intended Activities	Next Immunisation
Mr Rodger FOSTER	7 York Road, Birmingham,	B23 6TE	21 Sep 1970	25 Feb 2021	08:00 - 08:30	Clients Home	Assessment	Reassessment	
Mr Eddie TAYLOR	475a Coventry Road, Birmingham,	B10 0TJ	21 Sep 1970	25 Feb 2021	09:00 - 09:30	Clients Home	Assessment	Advice Assessment	
Mrs Willemena TAYLOR	475a Coventry Road, Small Heath, Birmingham,	B10 0TJ	25 Apr 1972	25 Feb 2021	09:00 - 09:30	Clients Home	Assessment	Advice Assessment	
Mr Thomas RUSSELL	15 Grange Road, Aston, Birmingham, West Midlands	B6 6LA	21 Sep 1970	25 Feb 2021	10:30 - 11:00	Clients Home	Assessment	Medication - Administration Eye drops/Eardrops	
Mr James DANKS	497a Coventry Road, Small Heath, Birmingham,	B10 0JS	21 Sep 1970	25 Feb 2021	12:00 - 12:30	Clients Home	Assessment	Continance Advice	
<input type="button" value="Print"/> <input type="button" value="Close"/>									

- Click **Print**
- Click **Close**



Outcoming a Diary Appointment

When a Client has been seen by the HCP, the Diary Appointment should be outcomed to reflect this action has taken place.

- Access the **HCP Diary**
- Locate the **Appointment**

08:00 - 08:30	FOSTER, Rodger (Mr)	Clients Home	Follow-Up Appointment	To Outcome
-------------------------------	-------------------------------------	------------------------------	---------------------------------------	----------------------------

- Click **To Outcome**

The **Attendance Indicator** screen displays giving the details of the **Appointment Date, Intended Duration, HCP(s) and Location** (top of screen).

The Clients details are displayed for you to check you are outcoming the correct Client.

- For **multiple Client** appointments, tick to select the required Client(s) at the top of the screen

Clients	Specialty	Details	<input type="checkbox"/> Check All
ORIBA, Angela (Mrs)	GENERAL MEDICINE	No	<input checked="" type="checkbox"/>
RYDER, Clare (Mrs)	GENERAL MEDICINE	No	<input type="checkbox"/>

There are two blue tabs (left)



- Complete the **Attendance Information** tab

The pink/lilac fields are all mandatory

- Actual Duration:** Length of time spent at the visit
- Seen Time:** Arrival Time
- Consultation Medium:** Select Appropriate
- Conclusion:** Select Appropriate
- Attendance Comment:** If required

Attendance Information

Actual Duration minutes

Seen Time

Consultation Medium

Conclusion

Below this is the **Progress Note** recording option, this can be done at the time of outcoming or later via the Clients Clinical Portal, but **must be** completed within the timeframe given by your service.



- Click **Activities** tab

The **Actual Activities** screen now displays. If you added Intended Activities you will see the example below

Client	Activities	HCP	Actual Duration	Actual	<input type="radio"/> Actual	<input type="radio"/> Intended	Main Activity	<input type="radio"/> Delete
FOSTER, Rodger (Mr)	Reassessment	ASTON, Deidre	<input type="text"/> minutes	No	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

If you carried out the intended (Reassessment) **Activity** at the visit with the Client, then this needs to be indicated.

- Click **Actual**

If you wish to add further activities

Activity

Admission Assessment

Advice

Assessment

Bereavement Support

Blood Pressure Management

HCP

BLACK, Jacob

+

- Click **Activity** list
- Select the **Activity**
- Click **HCP** to select HCP
- Click

The second **Activity** (of Advice) has now been added and recorded that it was carried out by the second **HCP** in attendance.

Client	Activities	HCP	Actual Duration	Actual	<input type="radio"/> Actual	<input type="radio"/> Intended	Main Activity	<input type="radio"/> Delete
FOSTER, Rodger (Mr)	Advice	BLACK, Jacob	<input type="text"/> minutes	Yes	<input checked="" type="radio"/>	N/A	<input type="radio"/>	<input type="radio"/>
FOSTER, Rodger (Mr)	Reassessment	ASTON, Deidre	<input type="text"/> minutes	No	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

The **Main Activity** needs to be identified before this can be saved

- Click **Main Activity**
- Click **Save**
- Click **Close Outcome**



cancelling a Diary Appointment

It is important to monitor cancellations by Clients or by our service, as this provides the Trust with a true reflection of the patient's journey.

14:30 - 15:00	ADAMS, Alan (Mr)	Patient's Home	First Appointment	To Outcome
---------------	------------------	----------------	-------------------	----------------------------

- To **Cancel**, click the appointment time eg **14:30 – 15:00**

This opens the **Book HCP Appointment** screen.

- Click **Cancel Appointment** (located at the bottom, centre)
- For **multiple Client** appointments, tick to select the required Client(s) at the top of the screen

Client ID	Client Name	<input type="checkbox"/>
1000479	ORIBA, Angela (Mrs)	<input checked="" type="checkbox"/>
1000297	RYDER, Clare (Mrs)	<input type="checkbox"/>

Cancellation Date Time: Change this to reflect the date the patient called/you called

Cancellation Reason: Choose from the list

Cancellation Comment: Type in relevant comment

Cancelled By: Autofills user from Smartcard

- Click **Cancel this Appointment**

You will see a prompt asking 'are you sure you wish to continue to cancel?'

- Click **Yes**

Rio now presents the **Select Letter** screen which allows you to generate a cancellation letter from the Rio letter templates.

- Click **Close**

You will see a prompt 'do you want to discharge the referral for Client?'

- Click **No**

Rio returns you to the HCP Diary.

You will see that the appointment no longer displays in the diary.



Outcoming as a Did Not Attend (DNA)

When attending a home visit, if there is no answer at the door, the outcome is recorded as follows.

- Access the **HCP Diary**
- Locate the **Appointment**

08:00 - 08:30	WALKER, Ethan (Mr)	Patient's Home	First Appointment	To Outcome
-------------------------------	------------------------------------	----------------	-------------------	----------------------------

- Click **To Outcome**

The **Attendance Indicator** screen displays giving the details of the **Appointment Date, Intended Duration, HCP(s) and Location** (top of screen)

The Clients details are displayed for you to check you are outcoming the correct Client.

There are two blue tabs (left)



- Complete the **Attendance Information** tab

The pink/lilac fields are all mandatory

Actual Duration: Leave Blank

Seen Time: Leave Blank

Consultation Medium: Leave Blank

Conclusion: Did Not Attend

Attendance Comment: Left a note through the door

The **Activities** tab has disappeared as the Conclusion of Did Not Attend tells Rio that the Client was not seen, therefore no Activities were carried out.

- Click **Save**

Rio will prompt you to book a follow up

Information

Do you want to book a follow-up appointment?

- Click **No**
- Click **Close Outcome**

08:00 - 08:30	WALKER, Ethan (Mr)	Patient's Home	FU-F2F Consultation	Did Not Attend
-------------------------------	------------------------------------	----------------	---------------------	--------------------------------



Rescheduling An Appointment

Once an Appointment has been booked it can be rescheduled using the **Appointment Scratch Pad**. However, this should be used carefully as incorrect use will result in Client Appointments being duplicated or missed and this could provide false statistics for our services.

The Appointment is booked in the usual way.



The Client calls to ask you to visit tomorrow instead as they have an urgent hospital appointment. Rather than Cancel the Appointment and Rebook for the following day you can utilise the Appointment Scratch Pad.

- **Click & drag** Appointment to Scratch Pad (located at the bottom left)

Move Appointment to Scratch Pad dialogue box displays:

Reschedule Reason: Select a required reason

Reschedule Comment: Enter an appropriate comment

- Click **Move to Scratch Pad**



The Client's appointment now appears in the Scratch Pad, **this is temporary** and should be moved as soon as possible.

When the new appointment date and time is agreed, you will need to move the appointment to the new new Appointment Date & Time.

- **Click & drag** Appointment **from** the Scratch Pad **to** the new position (this will highlight in blue)

Rio will prompt for you to Select a reschedule letter from the templates

- Click **Close**

The Appointment now displays with the Rescheduled icon on the far right of the diary.





Group Activities

Some services book Group Activities into their HCP Diaries when working with groups of Clients. This does not specify the names of the Clients or record in their EPR but provides other information for the service.

- Click **Location/Other Activity** at the specific time (3rd column on diary)

Book Other Activity screen displays

- Start Date:** Autofills
- Time:** Autofills
- Duration:** Select time required
- HCP:** Autofills
- Activity Type:** Type of Group
- Location:** Location of Group
- Comments:** Complete if required

Start Date	25 May 2021	Time	14:00	Duration	1 hour
HCP	ASTON, Deidre	Comments	Group for parents		
Activity Type	Baby Massage				
Location	RiO Health Centre				

There are 3 tabs (located left)



If you have colleagues also invited to the group session, select these on the HCPs Invited tab.

- Click **HCP's Invited**
- Click

HCP Name	Include In Activity
AMALIA, Vitya	<input type="checkbox"/>
ANDERSON, James	<input type="checkbox"/>
BEARWOOD, William	<input checked="" type="checkbox"/>
BEGUM, Aska	<input type="checkbox"/>
BHATTI, Charan	<input type="checkbox"/>
BLACK, Jacob	<input checked="" type="checkbox"/>
CANNON, Fernando	<input type="checkbox"/>



Repeat Activities can be booked for recurring Group Sessions, here we have booked sessions to repeat weekly, every Tuesday for the next 6 weeks.

- Click **Repeat Activities** tab

Allow Repeat Bookings:

Frequency Daily Recur every 1 week(s) on

 Weekly Monday

 Monthly Tuesday

 Yearly Wednesday

 Thursday

 Friday

End After 6 Total No. of Repetitions

Group Booking tab can now be completed with the finer details of the session and its attendees. These are all mandatory fields.

- Click **Group Booking** tab

Name of Group: Complete as required

Venue: Complete as required

Type of Group: Complete as required

Number of People Present: Complete as required

- Click **Book**

The **Group Activity** displays in the Diary as a Group Contact in **Green** with the **Repeating icon** alongside the time of the group.

When hovering over the Repeating icon you will see the number of repeating group activities have been made.

13:30	1 of 7	
14:00 - 15:00		Baby Massage



Other Activities

Other activities may be recorded in the HCP Diary e.g., training days, meetings etc.

- Click **Location/Other Activity** column at the specific time (3rd column on diary)

Book Other Activity screen displays

- Start Date:** Autofills
- Time:** Autofills
- Duration:** Select time required
- HCP:** Autofills
- Activity Type:** Type of Group
- Location:** Location of Group
- Comments:** Complete if required

- Click **Book**

The Other Activity displays in the Diary in a darker green compared to the green of the Group Activity.

15:30 - 17:30		Training-mandatory
-------------------------------	--	--------------------