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### **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.



**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.

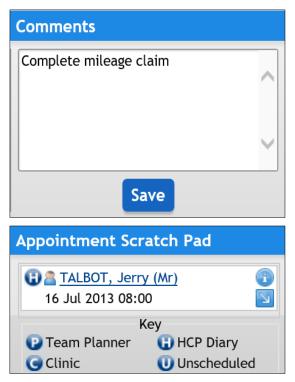
**Date:** use the calendar to view another date, the calendar with red date indicator inserts today's date.

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

## Diary





# 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

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

- Community Appointment COH Working Hours MTA Monthly Team Allocated Clinic Appointment CLW Working Hours CLO Outside Hours CLU Past Unoutcomed
- Select the Visual Indicator checkbox (top right) to display

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

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

you directly to other Rio functionalities





### **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., <u>09:00</u>)

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 H	ome		•			
НСР	ASTON, Deidre			•	Urgency	Routine	•	Туре	First App	ointment		•			
Face-to-fac	er Appointment Comments Client is in a wheelchair nsport Required														
Client(s)	Additional HCF	Ps Inter	ded Activities	Repea	t Appointments										
Client ID	Client		Relationship to	Client	Referral					Transport	Interpreter	Required	d Proxy Contact	Comments	
1000616	a TAYLOR, Edd	lie (Mr)	Client		GENERAL MEDICINE	(Birmingham Healt	hcar	e (COTTERI	DGE, K 🔻						
	Book Close Booking														
						close	0001	Ming							

- 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



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 🚡 <u>TAYLOR, Eddie (Mr)</u>	Clients Home	First Appointment	To Outcome		W
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### 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	Client(s)	Additional HCPs	Intended Act	tivities	Repeat A	ppointments
•	Scroll to view the lower part of the screen						
Click Please Select drop-down (right) to locate the HCP     Please Select							
•	Select the required HCP from the list				BLACK,	, Jacob	•
•	When the Additional HCP name is visible,	, click <b>Add</b>	НСР				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	<b>s</b> tab	Client(	s)	Additional HCPs	Intended	Activities	Repeat Appointments
•	Check the <b>Activities</b> intende out at the Appointment	ed to be carri	ed	✓ Ad Ca Die Ho	ouble-Up - Manual lvice atheter Care etary Advice ome Assessment in Management	Handl	End of	nent ession bandaging
•	Click Add	Add			eatment			Care - Simple (Mult

Client	Activities	НСР	Main?	_
TAYLOR, Eddie (Mr)	Advice	ASTON, Deidre	۲	
TAYLOR, Eddie (Mr)	Assessment	ASTON, Deidre	0	t

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
 Client(s)
 Additional HCPs
 Intended Activities
 Repeat Appointments

Allow Repeat Bookings:	
Appointment Type:	Select as required
Frequency Daily/Weekly/Monthly/Yearly:	<ul> <li>Select appropriate</li> </ul>
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	O Daily Weekly Monthly Yearly		week(s) on Tuesday Uednesday Friday Saturday
End After     End By 25 Fel		of Repetitions	

Clien	t/HCP Name Group	Booking Date
	AYLOR, Eddie (Mr) - 1000616	
		☑ 25 Feb 2021 10:30
		🗹 4 Mar 2021 10:30
		🗹 11 Mar 2021 10:30
		🗹 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.

C	lient ID	Client	Relationship to Client	Referral	Transport	Interpreter Required	Proxy Contact	Comments	
1	000613	FOSTER, Rodger (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (15 Jul 2013 00: 💌					
1	000616	a TAYLOR, Eddie (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (COTTERIDGE, K					

• 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)	۲	0	0	Referral Not Required
TAYLOR, Eddie (Mr)	TAYLOR, Miriam (Miss)	۲	0	$\bigcirc$	Referral Not Required
TAYLOR, Eddie (Mr)	TAYLOR, Willemena (Mrs)	0	0	۲	GENERAL MEDICINE (Birmingham Healthcare (15 Jul 201: 🗙 📼

#### • Click Add Client(s)

lient 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: 🔻					
000616	a TAYLOR, Eddie (Mr)	Client	GENERAL MEDICINE (Birmingham Healthcare (COTTERIDGE, K 💌					

#### Click Book

09:00 - 0	0.30	🚡 <u>TAYLOR, Willemena (Mrs)</u>	Clients Home		<u>To Outcome</u>	
09:00 - 0	7:30	🚡 <u>TAYLOR, Eddie (Mr)</u>	ctients nome	First Appointment	<u>To Outcome</u>	Ē

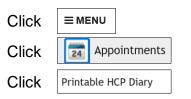
All the Client(s) will then display in the booked appointment

Best Care BCHC Digital Skills Training Team/V1.0/JP Healthy Communities

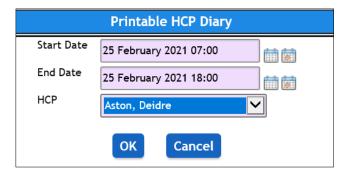


### **Printing a Diary List**

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



Start Date & Time:	Select as required
End Date & Time:	Select as required
HCP's Name:	Select as required



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

	Parameters: Start Date	= 25 Feb	ruary 2	021 07:00, E	nd Date =	25 Febru	ary 2021 18	:00, HCP = Aston, Deidre	
				Record Count:	5 records re	turned			
Name	Address	Postcode	Date of Birth	Appointment Date	Intended Time	Location	Referral Reason	Intended Activities	Next Immunisatior
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	Continence Advice	

Click Print

Click OK

•

• Click Close





Activities

### **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 Source Follow-Up Appointme	nt <u>To Outcome</u>
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#### 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

Cli	ients	Specialty	Details	Check All
2	ORIBA, Angela (Mrs)	GENERAL MEDICINE	No	✓
2	RYDER, Clare (Mrs)	GENERAL MEDICINE	No	

Attendance Information

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
	5 1

- Seen Time: Arrival Time
- Consultation Medium: Select Appropriate
- Conclusion: Select Appropriate
- Attendance Comment: If required

	Attendance Information
Actual Duration	45 minutes
Seen Time	07:50
Consultation Medium	Face to Face with Client
Conclusion	Attended 🗸

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

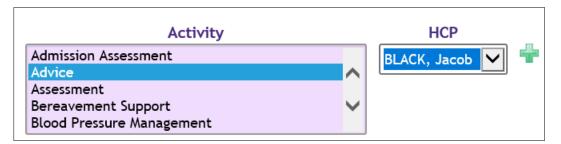
The **Actual Activities** screen now displays. If you added Intended Activities you will see the example below

Client	Activities	НСР	Actual Duration	Actual	O Actual	Intended	Main Activity	O Delete
EOSTER, Rodger (Mr)	Reassessment	ASTON, Deidre 🔽	minutes	No	0	0	۲	0

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



- 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	НСР	Actual Duration	Actual	O Actual	Intended	Main Activity	O Delete
FOSTER, Rodger (Mr)	Advice	BLACK, Jacob	minutes	Yes	۲	N/A	0	0
EOSTER, Rodger (Mr)	Reassessment	ASTON, Deidre 🔽	minutes	No	۲	0	۲	0

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.



• 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	Client ID	Client Name	
•	select the required Client(s) at the top of the	1000479	ORIBA, Angela (Mrs)	✓
		1000297	RYDER, Clare (Mrs)	
	screen			

- **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

	Select Letter				
ADAMS, Alan (Mr) 1 Jan 1951 (70 ye	ear(s) old) Male NHS. 941 022 6104 🔼 👔 Actions				
Letter Template Batch Print Selection Letter Template Diary Test Letter 1 (Default)					
	Print Close				

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	<u>To Outcome</u>
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#### Click <u>To Outcome</u>

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)

Attendance Information Activities

• 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?	
Yes No	

- Click No
- Click Close Outcome

<u>08:00 - 08:30</u>	🚨 WALKER, Ethan (Mr)	Patient's Home	FU-F2F Consultation	Did Not Attend
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### **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	Move Appointment to Scratch Pad			
dialogue box displays:	Reschedule Reason Reschedule Comment	Please Select	•	
		Move to Scratch Pad		

**Reschedule Reason:** 

Select a required reason

Enter an appropriate comment

**Reschedule Comment:** 

Click Move to Scratch Pad

Appointment Scratch Pad		
TALBOT, Jerry (Mr) 16 Jul 2013 08:00	1	
WALKER, Ethan (Mr) 24 May 2021 10:30	3	

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.

12:00 - 12:30 📓 WALKER, Ethan (Mr) Patient's Home First Appointment <u>To Outcome</u> 🕓	
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### **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 💌
НСР	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	
ANDERSON, James	
BEARWOOD, William	
BEGUM, Aska	
BHATTI, Charan	
BLACK, Jacob	
CANNON, Fernando	





**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:		$\checkmark$		
Frequency	Daily	0	Recur every 1 week(s)	
	Weekly	$\odot$	Monday	
	Monthly	0	Tuesday	$\checkmark$
	Yearly	0	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.

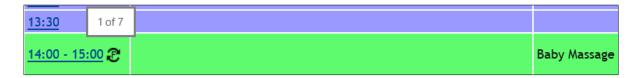
• Click Group Booking tab

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.





### **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 (3<sup>rd</sup> 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.

