



Contents

Overview	2
Opening Clinics	2
Clinic Screen Overview	3
Show/Hide Option Panel, Buttons and Visual Indicators	3
Clinic Views	4
Date Options.....	4
Refresh Button.....	4
Actions Options.....	5
Clinic Date Options and Search Appointment.....	6
Booking a Clinic Appointment.....	7
Client(s) Section	8
Additional HCP's Section	9
Intended Activities Section.....	9
Repeat Appointments Section	10
Appointment Options	11
Editing an Appointment	12
Arriving a Client (List View)	12
Printing a Clinic List (List View)	12
Booking an Appointment for Family Member Clients.....	13
Appointment Search.....	14
Recording an Outcome (One Client)	15
Attendance Information Tab.....	15
Activities Tab	16
Recording Outcomes (Multiple Clients)	17
Recording Activities (Two HCPs)	18
Attendance Information Tab.....	18
Activities Tab	18
Cancelling an Appointment.....	19
Recording a DNA (Did Not Attend).....	20
Rescheduling a Clinic Appointment.....	21
Booking Other Activities	22
Reversing an Outcomed Appointment.....	23



Overview

The Clinic Appointment screen allows a user to view Clinic information in a variety of layouts and perform different functions. You can book and outcome appointments for an individual, multiple Clients and even a group of Clients.

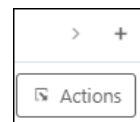
Opening Clinics

- Click **MENU**
- Click **Quick Menu**
- Click **Clinic Appointments**

Any previously opened Clinic(s) will display automatically. If you have no open Clinics, you will be prompted to select one from a picklist

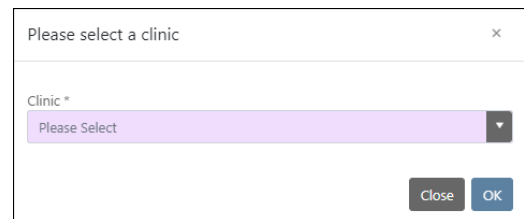
You may have several Clinics open at the same time

- To open a Clinic, click the **grey Plus** (top right, above Actions)



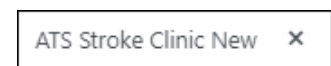
The **Please select a clinic** dialogue box will display

- Click the **Clinic** drop-down
- Locate your Clinic and select it
- Click **OK**



The Clinic screen now displays and will open at the last date that this Clinic was accessed

The name of the Clinic displays in the top left, with a **Close** option to the right of the tab.





Clinic Screen Overview

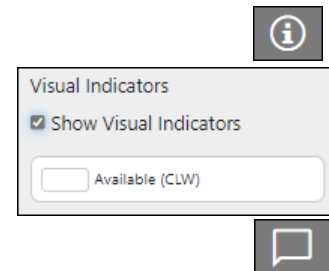
Show/Hide Option Panel, Buttons and Visual Indicators



The Clinic screen will open displaying the various options on the left in a column

The Calendar option is normally auto-selected (See Clinic Date Options section for full Calendar details)

- Click the **Visual Indicators** button to reveal the Key for the colours
- Click the **Show Visual Indicators** tick box to reveal the text codes
- Click the **Show Visual Indicators** tick box to remove the tick and hide the text codes
- Click the **Comments** button to reveal any Comments



There are two types of Comments:

Clinic Comment which is added when the Clinic is built and displays for every instance of the Clinic

Day Comments which can be completed with information relevant to that specific day.

- Click the **Edit** button to add a Day Comment, then click the **Save** button
- Click the **Scratch Pad** button to reveal the Scratch Pad (see Rescheduling a Clinic Appointment below for more information)
- The Trust does not use the **Unscheduled** functionality
- Click the **"X"** button to hide the Options Panel



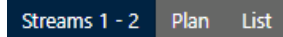


Clinic Views

Stream View

This is the default View for Clinics. A Clinic may have several Streams; these could be for each individual room at a Clinic Venue or for each HCP working in the Clinic

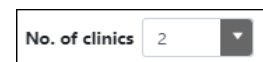
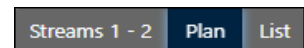
- Click the **Streams** button (top left) to display the Clinic in **Stream View**



Plan View

Plan View allows you to see multiple Clinics for future dates

- Click the **Plan** button (top left) to display the Clinic in **Plan View**
- Click the **No. of clinics** drop-down to choose the number of Clinics dates you want to display
- Click the **Next** button (top right) or **Prev** (previous) button (top left) to scroll through the Clinics

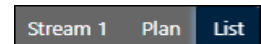


Plan View hides Client information unless you hover over a purple block

List View

List View displays appointments in a list format:

- Click the **List** button (top left) to display the Clinic in **List View**



Appointments are arranged by appointment time
Appointment letters can be generated from this view
Allows staff to Arrive Clients / Patients
Allows users to Print a Clinic List

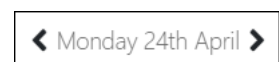
Date Options

The selected Clinic date will display above the Stream/s

The **Single arrow to the left** takes the date back 1 Clinic day

The **Single arrow to the right** takes the date forward 1 Clinic day

The **Today** button changes the date to "Today"



Refresh Button

The Refresh button allows you Refresh the current screen

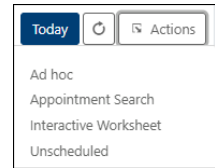


- Click the **Refresh** button (top right) to reload the screen with updated information e.g. View new Arrival data



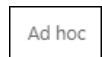
Actions Options

The **Actions** button offers a selection of other functions



- Click the **Actions** button (top right) to see the various options

The **Ad hoc** link allows users to access an HCP Diary and book a Community Appointment. This link does not display for all users



- Click the **Ad hoc** link, select the required **HCP** from the list, click **OK**

The **Appointment Search** link allows users to search for an Available/Booked/Other Activity appointment. See the



Appointment Search section for full details

- Click the **Appointment Search** link

The **Interactive Worksheet** link allows users to open the Interactive Worksheet for their team. The Interactive Worksheet is a list of Clients who have an open referral to the team and are waiting for an appointment. The Interactive Worksheet link will only display for Services who use this functionality



- Click the **Interactive Worksheet** link

The Trust does not use the **Unscheduled** functionality



Clinic Date Options and Search Appointment

The **Calendar** button allows the user to change the date in a variety of different ways

- Click the **Calendar** button (left)

The **Clinic Date** allows the user to free-type a date, then press **Enter**

The **Today** button changes the date to “Today”

The **Double arrow to the left** takes the date back 5 Clinic days

The **Single arrow to the left** takes the date back 1 Clinic day

The **Single arrow to the right** takes the date forward 1 Clinic day

The **Double arrow to the right** takes the date forward 5 Clinic days

The screenshot shows a dark grey 'Calendar' button with a calendar icon. Below it is a 'Clinic Date' input field with the text '8 Jan 2024'. To the right of the input field is a navigation bar with a double left arrow, a single left arrow, the text 'Today', a single right arrow, and a double right arrow.

The **Calendar** options allow the user to change the day, month and year

The screenshot shows a calendar for June 2023. At the top, there are dropdown menus for 'Jun' and '2023'. Below the dropdowns is the text 'June 2023'. The calendar grid shows days of the week (Mo, Tu, We, Th, Fr, Sa, Su) and dates from 1 to 30.

The **Clinic Day** allows the user to select the previous or future 7 Clinic dates

The screenshot shows a 'Clinic Day' dropdown menu with the text '22 May 2023' and a downward arrow.


The **Weeks in Advance** allows the user to search for Clinics up to 26 weeks in advance of the displayed Clinic date

The screenshot shows a 'Weeks in Advance' dropdown menu with the text '0 Week' and a downward arrow.



Booking a Clinic Appointment

If you are assigned to a Service specific Clinic this will display. If not, follow the **Opening Clinics** section of this guide


- Ensure the **required Clinic** is displaying for the **correct date**
- Locate the required **Stream** and **time** of the appointment to be booked
- Click the **grey Action**  button (far right)
- Click **New Appointment**
- **Search** for the Client you wish to book into the appointment

The **Book Appointment** screen will display

There are 5 sections to complete

The **Appointment Details** section will display at the top of the screen

▼ Appointment Details

Date	9 Oct 2023 	Time	13:00	Intended Duration	1 hour	Intended Consultation Medium	Face to Face with Client
HCP	Please Select	Urgency	Please Select	Type			First Appointment
Clinic	BCHC Clinic 01						
Comments	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>						

Complete as required.

- **Date:** Autofills (Mandatory)
- **Time:** Autofills (Mandatory)
- **Intended Duration:** Autofills (Mandatory) – amend if required
- **Intended Cons. Medium:** Complete if required
- **HCP:** Leave blank if the HCP is unknown at time of booking or select if required
- **Urgency:** Complete as required
- **Type:** Select required appointment type
- **Clinic:** Autofills (Mandatory)
- **Comments:** Complete if required



Client(s) Section

▼ Client(s)

Client ID	Client	Relationship to Client	Referral & Waiting List	Transport	Interpreter Required	Proxy Contact	Comments
1000562	EDWARDS, Courtney (Miss)	Client	Please Select			<input type="checkbox"/>	

Ad hoc Client for

Transport Required Carer Appointment **Add Client** **Remove Client(s)**

Add

Key

Interpreter Required Interpreter Not Required Interpreter Booked Interpreter Cancelled

Transport Required Transport Not Required Transport Booked Transport Cancelled

This section displays the Client's name and most importantly the Referral information. It also allows for indication that an Interpreter needs to be booked, cancelled, is required and multiple Clients to be added to the appointment (if required).

Adding an Interpreter

- Click the **Green Plus Symbol** below **Interpreter Required**

The **Please choose Interpreter options for this Client** dialogue box will display

- Interpreter Required is auto-selected
- Language:** Select Language
- Comments:** Complete if required
- Click **Save**

Please choose Interpreter options for this Client

Choose Options

Not Required

Interpreter Required

Interpreter Booked

Interpreter Cancelled

Language

Comments

Prefers a female.

Note: Changes will not be saved until the book or update button on main window is clicked!

Save **Cancel**

Please note: you must follow your SOP's for physically booking the interpreting services

Adding Multiple Clients

If the appointment is shared with another Client, they can be added here

- Click the **Add Client** button (bottom right)
- Search** for the additional Client
- Click **Add Client**

The additional Client is now visible in the booking screen

Client ID	Client	Relationship to Client	Referral & Waiting List	Transport	Interpreter Required	Comments
1052213	ADYA_Rahem'S (Mr)	Client	PARKINSON'S SPECIALIST NURSING SERVICE (Parki			<input type="checkbox"/>
2001606	EL_KHIRAOUI_Lincoln (Mr)	Client	PARKINSON'S SPECIALIST NURSING SERVICE (Parki			<input type="checkbox"/>



Additional HCP's Section

▼ **Additional HCPs**

HCP Name	Client(s)
No HCP added.	
<input type="button" value="Search for HCP"/> <input style="width: 100px;" type="text" value="Please Select"/>	<input type="button" value="Add HCP"/> <input type="button" value="Remove HCP(s)"/>

If no HCP is selected in the Appointment Details then the Additional HCP section will not be active.

Appointments can be edited and HCPs added as required at any stage until the appointment is Outcomed

If an HCP is selected in the Appointment Details then the Additional HCP section will be active allowing users to add additional HCPs to the appointment if required

- Select the **Additional HCPs** section
- Click **Please Select** dropdown
- Select the **additional HCP's name** from the list of available staff
- Click **Add HCP** (right)

The additional HCP will be added to the appointment

Intended Activities Section

▼ **Intended Activities**

Client	Activities	HCP	Main?																																
EDWARDS, Courtney (Miss) (1000562)	Advice	ASTON, Deidre	<input checked="" type="checkbox"/>																																
		<input type="button" value="Add Activities"/> <input type="button" value="Remove Activities"/>																																	
<p>HCP(s)</p> <input checked="" type="checkbox"/> ASTON, Deidre																																			
<p>Client(s)</p> <input checked="" type="checkbox"/> EDWARDS, Courtney ...																																			
<p>Activities</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Photo Image Taken</td> <td><input type="checkbox"/> Activities of Daily Living</td> <td><input type="checkbox"/> Advice</td> <td><input type="checkbox"/> A&E Attendance</td> </tr> <tr> <td><input type="checkbox"/> Admission Assessment</td> <td><input type="checkbox"/> Assessment</td> <td><input type="checkbox"/> Bereavement Support</td> <td><input type="checkbox"/> Health Education</td> </tr> <tr> <td><input type="checkbox"/> Counselling</td> <td><input type="checkbox"/> Carer Support/Training</td> <td><input type="checkbox"/> Dietary Advice</td> <td><input type="checkbox"/> Home Assessment</td> </tr> <tr> <td><input type="checkbox"/> Health Promotion</td> <td><input type="checkbox"/> Immunisation given</td> <td><input type="checkbox"/> Joint Review with HCP</td> <td><input type="checkbox"/> Medication - Administration Eye drops/Eardrops</td> </tr> <tr> <td><input type="checkbox"/> Palliative - Symptom Control</td> <td><input type="checkbox"/> Review</td> <td><input type="checkbox"/> Treatment</td> <td><input type="checkbox"/> Accident Prevention</td> </tr> <tr> <td><input type="checkbox"/> Respiratory-Assessment</td> <td><input type="checkbox"/> Continence Advice</td> <td><input type="checkbox"/> Diabetic Care</td> <td><input type="checkbox"/> Reassessment</td> </tr> <tr> <td><input type="checkbox"/> Catheter Care</td> <td><input type="checkbox"/> Pain Management</td> <td><input type="checkbox"/> Blood Pressure Management</td> <td><input type="checkbox"/> Compression bandaging</td> </tr> <tr> <td><input type="checkbox"/> Enuresis assessment</td> <td><input type="checkbox"/> End of Life Care</td> <td><input type="checkbox"/> Medication-Advice</td> <td><input type="checkbox"/> Wound Care - Simple (Multiple)</td> </tr> </table>				<input type="checkbox"/> Photo Image Taken	<input type="checkbox"/> Activities of Daily Living	<input type="checkbox"/> Advice	<input type="checkbox"/> A&E Attendance	<input type="checkbox"/> Admission Assessment	<input type="checkbox"/> Assessment	<input type="checkbox"/> Bereavement Support	<input type="checkbox"/> Health Education	<input type="checkbox"/> Counselling	<input type="checkbox"/> Carer Support/Training	<input type="checkbox"/> Dietary Advice	<input type="checkbox"/> Home Assessment	<input type="checkbox"/> Health Promotion	<input type="checkbox"/> Immunisation given	<input type="checkbox"/> Joint Review with HCP	<input type="checkbox"/> Medication - Administration Eye drops/Eardrops	<input type="checkbox"/> Palliative - Symptom Control	<input type="checkbox"/> Review	<input type="checkbox"/> Treatment	<input type="checkbox"/> Accident Prevention	<input type="checkbox"/> Respiratory-Assessment	<input type="checkbox"/> Continence Advice	<input type="checkbox"/> Diabetic Care	<input type="checkbox"/> Reassessment	<input type="checkbox"/> Catheter Care	<input type="checkbox"/> Pain Management	<input type="checkbox"/> Blood Pressure Management	<input type="checkbox"/> Compression bandaging	<input type="checkbox"/> Enuresis assessment	<input type="checkbox"/> End of Life Care	<input type="checkbox"/> Medication-Advice	<input type="checkbox"/> Wound Care - Simple (Multiple)
<input type="checkbox"/> Photo Image Taken	<input type="checkbox"/> Activities of Daily Living	<input type="checkbox"/> Advice	<input type="checkbox"/> A&E Attendance																																
<input type="checkbox"/> Admission Assessment	<input type="checkbox"/> Assessment	<input type="checkbox"/> Bereavement Support	<input type="checkbox"/> Health Education																																
<input type="checkbox"/> Counselling	<input type="checkbox"/> Carer Support/Training	<input type="checkbox"/> Dietary Advice	<input type="checkbox"/> Home Assessment																																
<input type="checkbox"/> Health Promotion	<input type="checkbox"/> Immunisation given	<input type="checkbox"/> Joint Review with HCP	<input type="checkbox"/> Medication - Administration Eye drops/Eardrops																																
<input type="checkbox"/> Palliative - Symptom Control	<input type="checkbox"/> Review	<input type="checkbox"/> Treatment	<input type="checkbox"/> Accident Prevention																																
<input type="checkbox"/> Respiratory-Assessment	<input type="checkbox"/> Continence Advice	<input type="checkbox"/> Diabetic Care	<input type="checkbox"/> Reassessment																																
<input type="checkbox"/> Catheter Care	<input type="checkbox"/> Pain Management	<input type="checkbox"/> Blood Pressure Management	<input type="checkbox"/> Compression bandaging																																
<input type="checkbox"/> Enuresis assessment	<input type="checkbox"/> End of Life Care	<input type="checkbox"/> Medication-Advice	<input type="checkbox"/> Wound Care - Simple (Multiple)																																

This section allows the user to select the activity/ies they intend to do at the appointment, at the time of booking. However, activities can also be recorded when Outcoming the appointment.

- Select the **Intended Activities** Section
- Click to select the **required Activity/ies**
- Click the **Add** button (above on the right)

Once the Add button is selected, the Selected Activities will display alongside Client's name under the section heading



Repeat Appointments Section

This section allows the user to create repeat appointments, for example, if a Client is going to attend a series of exercise classes or a regular appointment as part of a course of treatment

Users do not need to complete this section unless repeat appointments are required

Repeat Appointments

Allow Repeat Bookings Appointment Type: Follow-Up Appointmen

Frequency:
 Daily
 Weekly
 Monthly
 Yearly

Recur every week(s) on
 Monday Tuesday Wednesday
 Thursday Friday Saturday
 Sunday

End After Total No. of Repetitions
 End By 9 Oct 2023

Client/HCP Name Group	Booking Date	Status
▲ EDWARDS, Courtney (Miss) (1000562) - 1000562	<input checked="" type="checkbox"/> 9 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 16 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 23 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 30 Oct 2023 13:00	




- Place a **tick** in the **Allow Repeat Bookings** tick box
 - **Appointment Type:** Select as required
 - Select the **Frequency** Depending on when the Client needs to be seen
 - **Recur every:** Select the number of days/weeks/months etc. required and the required days of the week or day/repeat pattern for the months/years
 - **End After:** Select the total number of appointment repetitions
- Or
- **End By:** Select the date of the last appointment

The repeat appointments will display towards the bottom of the screen

Once you are happy with the information you have completed on the booking


- Click **Book**

If any of the appointments occur on a scheduled Bank Holiday (e.g. Christmas Day) a Booking Clash message will display. Select the Book Available option to only book appointments on the available dates

If the appointment has been booked with repeats, a repeat appointment icon will display on every appointment;  First appt,  Repeat appt,  Last appt



Appointment Options

When you select the **grey Action**  button several different options will display:

Open Appointment

Allows the user to make any changes to the appointment

Cancel Appointment

Allows the user to cancel the appointment from the Clinic

Record Outcome

The user completes the Outcome with the actions that took place at the appointment and this generates funding for the Service

Case Record

Opens the Client's Record on the Clinical Portal – Client's View screen

Client Diary

Open the Client's Record on the Client Diary screen

Slot History

Displays any previous bookings in the appointment slot

Client Arrived

Automatically records the current time as the arrival time on all Clinic Views and on the Outcome screen

Enter Arrival Time

Displays the Enter Arrival Time screen for the user to enter the time

Move Appointment

Displays the Move Appointment to Scratch Pad screen, a quick way to change an appointment

Book Follow Up

Displays the Appointment Search screen for the user to find available appointments slots and book a follow up appointment for the same Client


Depending on the state of the slot, the available options will vary





Editing an Appointment

An appointment can be edited up until it has been Outcomed. If appointment information needs to be edited after Outcoming, the appointment Outcome will need to be Reversed by a Rio user with Reversal functionality rights (usually Administrators, Team Leaders, Managers). Alternatively, this can be done on request by the Service Support team.

- Click the **grey Action**  button
- Select **Open Appointment**

The Appointment screen displays with an Update button located at the bottom.

- Make the required changes.
- Click **Update**

Arriving a Client (List View)

List View is the screen often used by receptionists to arrive Clients on Clinic. Once entered the colour of the appointment changes to a paler pink, to indicate the Client has arrived

Time	Client Name	Stream	Main HCP	Appointment Type	Arrival	Seen	End
08:00	EL KHI	2: Park	HCP, Bo (Mr)	First-F2F Consultation	12 : 48	HH : MM	HH : MM

- Click into each of the **Arrival** fields
- Complete as required. Clicking the clock icon next to the Arrival field auto fills the arrival time with the current time or type in the required time.
- Click **Save**

Printing a Clinic List (List View)


A paper copy of the Clinic List can also be printed in List View. The Print Clinic List button is located to the lower right of the List View screen

- Click **Print Clinic List**
- Complete as required
- Click **Go**



Booking an Appointment for Family Member Clients

Some Services associate Clients together as 'Family Members'. If a Client is a Family Member you can easily add other Family Members to the appointment

- Click the **grey Action**  button
- Click **New Appointment**
- Search for the first Client you wish to book into the appointment

The **Appointment Booking (Clinic)** screen will display

Complete as required

- **Date:** Autofills (Mandatory)
- **Time:** Autofills (Mandatory)
- **Intended Duration:** Autofills (Mandatory)
- **Intended Consultation Medium:** Complete if required
- **HCP:** Leave Blank or select as required
- **Urgency:** Complete as required
- **Type:** Select required appointment type
- **Clinic:** Autofills (Mandatory)
- **Comments:** Add if required
- Click **Add Client** (bottom right)

If the Client has Family Members added to their Rio record, the Family Members screen will display, Family Members are listed in the Participant column

Locate the Family Member/s you want to include in the appointment

- Click in the **Referred** column
- **Select the Referral** to your team


Client	Participant	Not Invited	Invited	Referred	Referral
EL KHI	ADDISON, Jan (Mrs) (1001000)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	TRAINING SERVICE TEAM


- Click **Add Client(s)** (bottom)
- Click **Book**

The Family Member is now added to the appointment

If the Clinic is displayed in **Stream View**, an appointment containing Multiple Clients will display as a **Group Booking**



- Click the **grey Action** button  to display the names of the booked Clients

Group Booking (2 people)




08:30 - ADRA, Ray (Mr)

08:30 - EL KHI, Lin (Mr)

Appointment Search

The Appointment Search functionality allows users to search for available or booked appointments in specific Clinics or with specific HCPs on specific dates or within a date range. Users can also book appointments from the Appointment Search screen.

- Click the **Actions** button (top right)
- Click **Appointment Search**

Today

 Actions

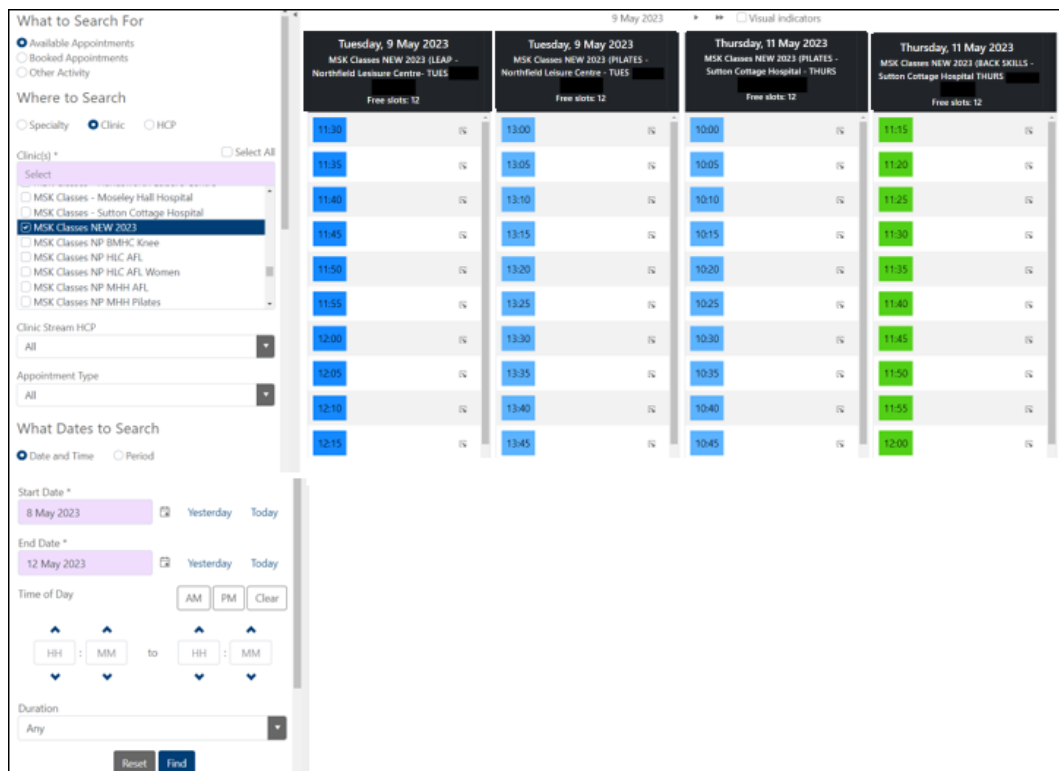
Ad hoc

Appointment Search

Interactive Worksheet


The **Appointment Search** screen will open

- Select the required available/booked appointments; Clinic/HCP and Date and Time/Period
- Click **Find**




The screenshot shows the 'Appointment Search' interface. On the left, there are search filters: 'What to Search For' (Available, Booked, Other), 'Where to Search' (Specialty, Clinic, HCP), 'Clinic(s)' (MSK Classes NEW 2023), 'Appointment Type' (All), and 'What Dates to Search' (Date and Time, Period). The main area displays a calendar view for 9 May 2023 and 11 May 2023, showing appointment slots with times and status indicators (e.g., 11:30, 13:00, 10:00, 11:15).

Only dates with the selected appointment type display

- Click the **grey Action** button  to book an appointment



Recording an Outcome (One Client)

- Click the **grey Action**  button
- Click **Record Outcome**

If the HCP was not selected when the appointment was booked, the HCP Selection screen will display

- Select the **HCP** name
- Click **Yes**

The **Attendance Indicator** screen will display

The Clinic ID, date, time, intended duration and HCP display at the top of screen

Clinic ID	PSNS Nurse Led Clinic – Sutton Cottage
Appointment Date	Monday, 24 Apr 2023, 08:00
Intended Duration	30 minutes
HCP	HCP, Bo (Mr)

There are two Tabs on the left of the screen **Attendance Information** and **Activities**, both will need completing


Attendance Information Tab

- **Arrival Time:** Complete with Client arrival time, if not already completed
- **Actual Duration:** Amend length of appointment, if required, in minutes
- **Seen Time:** Complete with the appointment start time
- **Actual Consultation Medium:** Autofills if added to Book Appt screen, complete as required
- **Conclusion:** Complete as required
- **Attendance Comment:** Complete if necessary

Recording Progress Notes during the Appointment Outcome

A Progress Note can be recorded when Outcoming the appointment. The Note may be completed and Validated or be partially completed and saved with a Validation Status of 'Unvalidated' allowing the Note to be completed later via the Clinical Portal

Progress Note

Originator 

Note Type Administrative/Clerical

B I U ☰ ☰ ✂ 📄 📄

This is a test Progress Note

Validation Status **Unvalidated** **This is a significant event**

This Note contains third party information



Activities Tab

If Intended Activities were added at the time of booking, these will show on the Activities Tab. The HCP will be required to actualise the Activity and identify the Main Activity carried out at the appointment by selecting the Actual and Main Activity radio buttons ☉

Client	Activities	HCP	Actual Duration	Actual	<input type="radio"/> Actual	<input checked="" type="radio"/> Intended	<input type="radio"/> Main Activity	<input type="radio"/> Delete
EL KHI, Lin (Mr)	Advice	HCP, Bo (Mr)	minute(s)	No	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Activity

- Activities of Daily Living
- Advice
- Advice about Alcohol
- Advice about Benefits

Ctrl + click to select multiple.

HCP

HCP, Bo (Mr) +

Any additional Activities can be added from the Activity list

Adding Additional Activities

- Select the required **Activity** from the list
- Click the **green plus** +

If the new added Activity is the Main Activity, then the Main Activity ☉ needs to be changed to reflect this

Client	Activities	HCP	Actual Duration	Actual	<input checked="" type="radio"/> Actual	<input type="radio"/> Intended	<input type="radio"/> Main Activity	<input type="radio"/> Delete
EL KHI, Lin (Mr)	Advice	HCP, Bo (Mr)	minute(s)	No	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EL KHI, Lin (Mr)	Assessment	HCP, Bo (Mr)	minutes	Yes	<input checked="" type="radio"/>	N/A	<input checked="" type="radio"/>	<input type="radio"/>

Activity

- Activities of Daily Living
- Advice
- Advice about Alcohol
- Advice about Benefits

Ctrl + click to select multiple.

HCP

HCP, Bo (Mr) +



- Click **Save**
- Click **Close** ✕ icon (top right)

The appointment is now green indicating that it has been Outcomed

08:00	EL KHI, Lin (Mr) (20016)	↻
08:05		



Recording Outcomes (Multiple Clients)

- In Streams View
- Click the **grey Action**  button
- Click the **grey Action**  button for 1 of the Clients
- Click **Record Outcome**


If the HCP was not selected when the appointment was booked, the HCP Selection screen will display

- Select the **HCP** name
- Click **Yes**


The **Attendance Indicator** screen displays with a list of the booked Clients. Each Client has a tick box (far right)

If the outcome is the same for all clients in the booking i.e. They all attended and had same activities carried out:

Click **Check All** tick box

Clients	Specialty	Details	<input checked="" type="checkbox"/> Check All
ADRA, Ray (Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>
 EL KHI, Lin(Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>


If different Outcomes need to be recorded for each Client. Select the tick box for each individual Client and Outcome separately

Clients	Specialty	Details	<input type="checkbox"/> Check All
ADRA, Ray (Mr)	TRAINING SERVICE TEAM	No	<input type="checkbox"/>
 EL KHI, Lin(Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>

Complete the Attendance Information and Activities Tabs. See the Attendance Information Tab and Activities Tab sections



Recording Activities (Two HCPs)

- Click the **grey Action**  button
- Click **Record Outcome**

The **Attendance Indicator** screen displays the Clinic ID, date, time, intended duration and HCP(s) details of the appointment

There are two Tabs on the left of the screen **Attendance Information** and **Activities**, both will need completing


Attendance Information Tab

- **Arrival Time:** Complete with Client arrival time
- **Actual Duration:** Amend length of appointment, if required, in minutes
- **Seen Time:** Complete the appointment start time
- **Actual Consultation Medium:** Complete as required
- **Conclusion:** Complete as required
- **Attendance Comment:** Complete if necessary
- Record a **Progress Note** if required. See the Recording Progress Notes during the Appointment **Outcome** section


Activities Tab

Any Intended Activities which were added when the appointment was booked are displayed


Activities can also be selected from the Activity list

- Select the **Activity**
- Select the **HCP** who carried out the Activity
- Click **green Plus** 

Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
EL_KHI_Lin.(Mr)	Advice	HCP, Bo (Mr)	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EL_KHI_Lin.(Mr)	Assessment	HCP, Bo (Mr)	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Activity	HCP
<ul style="list-style-type: none"> Medication-More Monitoring Medication-Prescription Medication-Review Medication-Syringe Driver Mental Health Wellbeing Multiple Medication 	HCP, Ann (Ms) 


Ctrl + click to select multiple.

- Click **Actual** and **Main** (as required)
- Click **Save**
- Click **Close**  icon (top right)

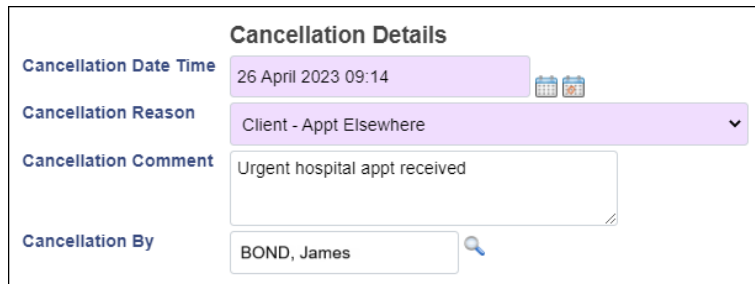


labelling="Section-Header">Cancelling an Appointment

Appointments may be cancelled by the Service or by the Client

- Locate the appointment which needs to be cancelled
- Click the **grey Action**  button
- Click **Cancel Appointment**

The **Cancel Appointment(s)** screen displays, complete the cancellation details



- **Cancellation Date Time:** Amend if required e.g. Date/ time Client notified
- **Cancellation Reason:** Select as required
- **Cancellation Comment:** Complete if required
- **Cancellation By:** Autofills
- Click **Cancel This Appointment**

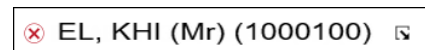
An Information prompt displays, asking **'Are you sure you want to continue to cancel?'**

- Click **Yes**

An Information prompt displays, asking **'Do you want to re-book this appointment?'**

- Click **No**

The cancelled appointment displays with the Client's name and the Cancellation icon in Stream View



Another Client can be booked into this appointment slot if required



Recording a DNA (Did Not Attend)

If a Client fails to attend their appointment, it is Outcomed as a DNA (Did Not Attend)

- Click the **grey Action**  button
- Click **Record Outcome**

The **Attendance Indicator** screen will display


- **Arrival Time:** Leave blank
- **Actual Duration:** Autofills
- **Seen Time:** Leave blank
- **Actual Consultation Medium:** Autofills if completed at time of booking.
- **Conclusion:** Did Not Attend
- **Attendance Comment:** Complete if required e.g. Admin to call Client to discuss
- Click **Save**

Attendance Information	
Arrival Time	<input type="text"/>
Actual Duration	60 minutes
Seen Time	<input type="text"/>
Actual Consultation Medium	Please Select <input type="text"/>
Conclusion	Did Not Attend <input type="text"/>
Attendance Comment	Admin to call Client to discuss

An Information Prompt displays, asking '**Do you want to book a follow-up appointment?**'

- Click **No**
- Click **Close**  icon (top right)

The Outcomed appointment displays in grey

EL, KHI (Mr) (1000100) 



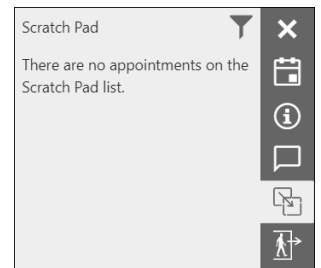
Rescheduling a Clinic Appointment

If an appointment needs to be moved to an alternative date, time or Clinic this can be done easily via the Appointment Scratch Pad. The Appointment Scratch Pad belongs to the team not to an individual. Any appointments moved onto the Scratch Pad must be immediately moved to the new appointment slot

The Appointment Scratch Pad is usually collapsed on the Clinic screen and will need to be displayed before starting to reschedule the appointment



- Click the **Scratch Pad** button (left) to open the Appointment Scratch Pad

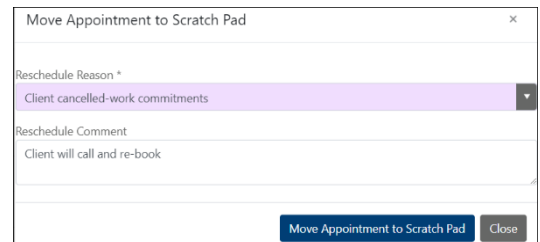


The appointment can now be 'dragged and dropped' into the Scratch Pad

- Click the **appointment**
- Holding the mouse button down, **drag** the appointment to the **Scratch Pad**
- **Release** the mouse button

The **Move Appointment to Scratch Pad** dialogue box will display

- **Reschedule Reason:** Select as required
- **Reschedule Comment:** Complete as required
- Click **Move Appointment to Scratch Pad**



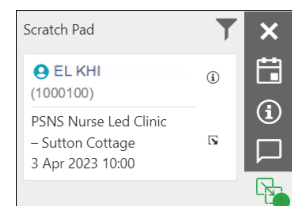
A Message Prompt displays, advising 'Appointment(s) successfully rescheduled!'

- Click **OK**

The Client's appointment will now display in the Scratch Pad

The icon will change to green with the number of appointments

- Locate the **new appointment slot**
- **Click and Drag** the appointment from the Scratch Pad to the new slot



A Message Prompt displays, advising '1 Appointment successfully rescheduled!'

- Click **OK**

The appointment displays with the **Reschedule** icon





Booking Other Activities

The **New Activity** function allows user to record Activities such as meetings, training events etc., where Client details don't need to be captured

- Click the **grey Action** button
 - Click **New Activity**
 - **Start Date:** Autofills
 - **Time:** Autofills, amend if required
 - **Duration:** Autofills, amend if required
 - **Activity Type:** Select as required
 - **Comments:** Complete if required
 - **Streams Tab:** Autofills
 - **HCP's Invited Tab:** Normally blank
 - **Repeat Activities Tab:** Complete if required
 - Place a **tick** in the **Allow Repeat Bookings** tick box
 - **Activity Type:** Select as required
 - Select the **Frequency** Depending on when the Activity occurs
 - **Recur every:** Select the number of days/weeks/months etc. required and the required days of the week or day/repeat pattern for the months/years
 - **End After:** Select the total number of Activity repetitions
- Or
- **End By:** Select the date of the last Activity
 - Click **Book**

The **Activity/Event** displays in green

Meeting- MDT

