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#### Overview

The Daily Team Planner (DTP), allows a team to build a list of Clients who need to be seen by the team. These 'tasks' can then be scheduled as Community Appointments with HCP's (Health Care Professionals) within the team.

For some services, the Daily Team Planner (DTP) is used alongside external systems which use other information such as the Teams Rota & HCPs competency levels to help decide which HCP sees which Client.

### **Accessing the Daily Team Planner**

- Click Menu
- Click Client Details
- Click Daily Team Planner
- Select your Team
- Click Go



## Filtering the Daily Team Planner

View the **Filter** pane (left of the screen)

- Team: select the specified team
- Date: select the required date
- Family Name: enter a Client's Family Name to filter and locate individual Client in DTP



- Appointment Type: default display is ☑ Booked and ☑ Unbooked tick to select/deselect
- Filter button: applies changes
- Reset button: resets to default settings





### **Adding Clients to the Daily Team Planner**

- Ensure you are on the correct Date
- Click the Add Client button (bottom left)

This Search screen opens

Enter the Client's details and search for them

The **Add to Daily Team Planner** screen displays. The Client's grey banner bar shows at the top of the screen.

Complete the fields as required.

Example - Our Client requires Wound Care daily for 7 days, preferably a morning visit

Referral: Will autofill with the team's referral

Appointment Comment: Wound Care (Right Leg)

Intended Activities: \*AM Visit ☑, Wound Care ☑

Book Repeat Appointments: ☑

• Total No. Of Appointments: 7

• Daily: ⊙

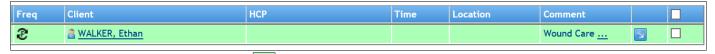
Daily every 1 day(s): ⊙



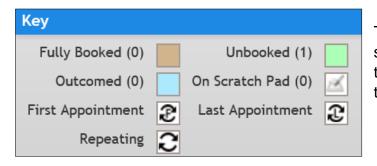
• Click Add (bottom of screen)



The Client will now be added to the DTP as a 'task' for the number of days specified in the repeat schedule you have created for them. If the Client needs to be seen multiple times in the same day, they will need to be added to the DTP for each time they need to be seen.



Hover over the First Appointment to view how many further appointments are added to the DTP

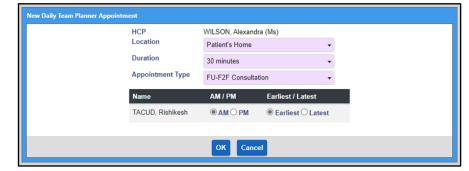


The Key is located on the left-hand pane of the screen and can be used to determine status of task added to DTP. In this case, 'Unbooked' task.

### Allocating the Task to a Health Care Professional

Each task added to the DTP needs to be placed in a specified HCP's Diary:

- Click the Place in Diary button
- The New Daily Team Planner Appointment dialogue box displays
- ALWAYS click Automatic •
- Complete the pink mandatory fields
- HCP: select the required HCP
- Intended Consultation
  Medium: select as required
- Location: Select the required location
- Duration: Select the required duration



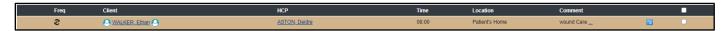
- Appointment Type: Select the required appointment type
- Click O AM/PM as required to indicate if this is an AM or PM visit
- Click O Earliest/Latest as required to indicate if the Client needs to be seen at the earliest or latest time
- Click Ok





The colour of the task changes. This is now a **Fully Booked** appointment.

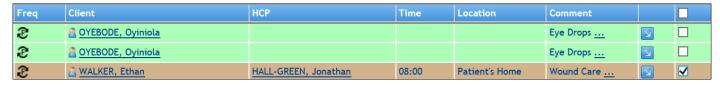
The allocated HCP's name, Time & Location of the Appointment is displayed on the DTP



Hover over the ellipses (...) next to the comment to display full details of the comment

#### Removing a Health Care Professional

If the HCP is unable to carry out the appointment added via the Daily Team Planner the task can be removed from that HCP and given to another HCP



- Click ☑ for specified task
- Click the Remove HCP button (bottom)

The **Remove HCP** dialogue box displays complete as required

- Reason: select relevant reason
- Date: enter date
- Click the Remove HCP button



The task will display in the green 'unbooked' colour. It will now need to be allocated to a different HCP.

## **Editing a Task**

If a task needs to be edited this can be done via the blue action button:

- Click
- Click Edit

You can add/delete information to the appointment comment or add/delete activities to the task; you are unable to edit the schedule of the tasks

Click Update







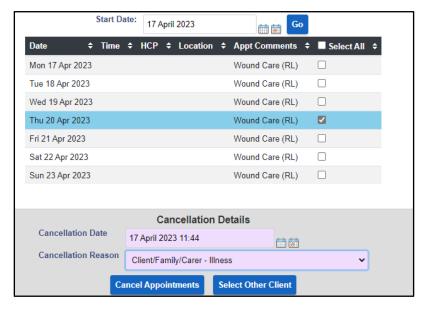
### **Cancelling a Task**

If a task needs to be Cancelled this can be done via blue action button:

- Click
- Click Cancel



#### The Cancel Team Planner Appointment/Allocation screen opens



**Note**: If a new schedule is required, tick **Select All** at the top of the screen to select all tasks to be cancelled

- Cancellation Date: enter date/time
- · Cancellation Reason: enter required reason
- Click Cancel Appointments button

An Information dialogue box displays asking if you are sure you want to cancel the appointment

Click Yes

The Daily Team Planner screen displays. The selected task for the date specified does not show as it has been cancelled.