



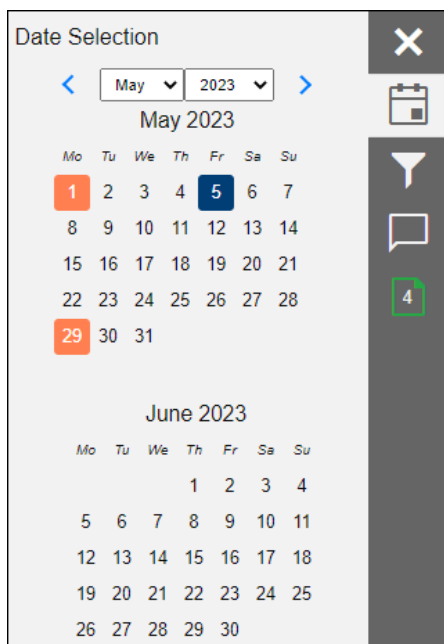
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Overview

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 **Date Selection**



Here you can select the date of the Diary you want to see displayed on the Right-hand side of the screen

The **Blue Chevrons** will change the Month selection forwards or backwards by 1 Month. You can also use the **Dropdown** boxes to select a specific month and/or year.

The **Selected date**, for the diary that is displaying on the right of the screen, will display in **Blue**

Bank Holidays will be displayed in **Orange**



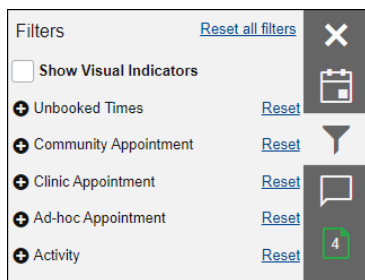
To the Right of the Date Selection, you will see the following icon menu

- Click to **Hide** the pane
- Click to **Open** the pane
- Click to display the **Date Selection** calendars
- Click to show **Filter** options
- Click to view **Comments**
- Click to show the **Scratchpad**

The pane on the Left of the screen will change to display the option selected in the Dark Grey icon menu list to the Right. The selected icon will display on a Light Grey background.

- Clicking on the **3 Dots** (bottom of the pane) will show another menu containing hyperlinks to different areas of Rio.

You can Filter the Diary screen to show specific information.

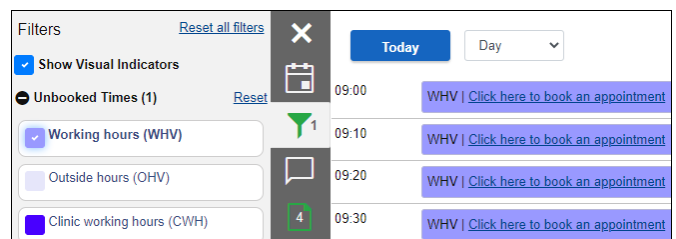


- Click on the **Filter icon** from the icon menu
- Select the **Visual Indicator checkbox** (top Left)

This displays a code in the Diary Appointment slots and alongside the Filter option.

The Diary times are set up according to the individual service requirements. The colours used in the Diary are all according to Trust standards.

- Click to **Display** the Filter options
- Click **Working Hours (WHV)** this will Filter the diary to only display the slots in Working Hours.

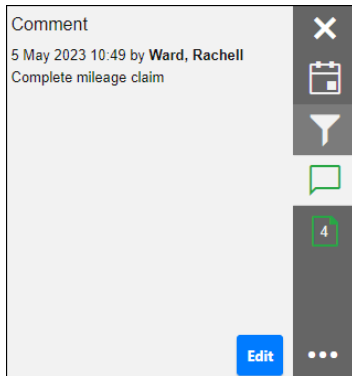


You can select to Filter the Diary using Multiple Filters (if required). The Filters icon in the menu (to the right) will display in Green when Filters are selected. The Number of Filters selected will display next to the Filters Menu Icon.

- Click [Reset](#) to remove Filters in a specific section
- Click [Reset all filters](#) (top of the pane) to deselect all Filters



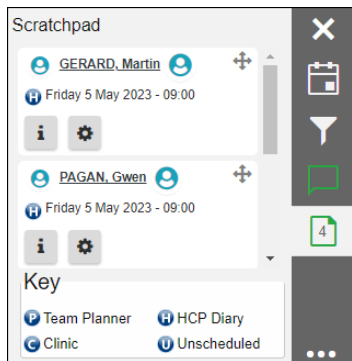
You can select the Comments Icon to view and record any Diary Comments.



The Comments icon in the menu will display in Green if there are Comments recorded. 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.

- Click **Edit** (bottom of pane)
- **Type** in comment text
- Click **Save**

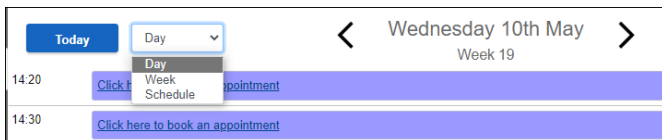
You can select the Scratchpad Icon to view any appointments waiting to be rescheduled.



There are 4 clients on this scratchpad waiting to be rescheduled. This is indicated by the number within the Icon.

There is a Key at the bottom of the pane to help determine what sort of appointment it is.

Moving over to the main Diary area (Right of Screen)



- Click **Today** to return to todays date in the diary
- Click the dropdown next to **Day** to select a different view of the diary

The Diary has 3 views Daily, Weekly & Schedule to accommodate all user preferences.



Booking a Diary Appointment

- Check the diary displays the date you wish to book the appointment for
- Click on the link [Click here to book an appointment](#) in the desired time slot (e.g., 11:00)

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:** (auto fills)
- **Time:** (auto fills)
- **Intended Duration:** (auto fills)
- **Intended Consultation Medium:** Select as appropriate
- **HCP** (auto fills)
- **Urgency:** Select as appropriate
- **Type:** Select as appropriate
- **Location:** Select as appropriate
- **Comments:** If required

The **Client(s)** section displays the **Client ID** and **Client** name. The **Referral & Waiting List** 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.



Booking a Diary Appointment with an Additional HCP

Follow the instructions for Booking a Diary Appointment to the **Additional HCPs** section, but don't book the appointment.

▶ Additional HCPs

- Click the **Additional HCPs** section to open it
- Click **Please Select** drop-down (on the Left) to locate the HCP
- Select the required HCP from the list
- When the Additional HCP name is visible, click **Add HCP** (on the Right)

Please Select ▼

BLACK, Jacob ▼

Add HCP

▼ Additional HCPs
Client(s)

HCP Name	Client(s)
MOWBRAY, Sarah	WARD, Courtney (Miss) (1860846)

Search for HCP
MOWBRAY, Sarah ▼

Add HCP
Remove HCP(s)

If you cannot find the required HCP in the list,

- Click **Search for HCP**

The **HCP Search** window will open to allow you to search using the Surname and Forename.

HCP Search

HCP National Code

HCP Surname

HCP Forename

Main Speciality

Staff Professional Group

Care Coordinator

Authorised SOAID

Named Nurse

Responsible Clinician

Responsible Clinician Profession

Search Result

Search for HCP

Mowbrey

Sarah

Please Select

Please Select

Consultant AMHP
 Other Doctor Approved Clinician

Please Select

MOWBRAY, Sarah

Search
Close
Accept HCP

- Enter **HCP Surname**
- Enter **HCP Forename**
- Click **Search**
- Select the correct HCP in the **Search Result** box
- Click **Accept HCP**
- Click **Book** (bottom)

The **Additional HCP** has now been added to this 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 **Intended Activities** section

- Click **Intended Activities** to open the section

▶ Intended Activities

- Tick the **Activities** (bottom of the section) intended to be carried out at the Appointment

<input type="checkbox"/> Activities of Daily Living <input type="checkbox"/> Catheter - Care <input type="checkbox"/> Giving Training <input type="checkbox"/> Personal care <input type="checkbox"/> Support Visit	<input type="checkbox"/> Advice <input type="checkbox"/> Counselling <input type="checkbox"/> Health Promotion <input type="checkbox"/> Reassessment <input type="checkbox"/> Treatment	<input type="checkbox"/> Assessment <input type="checkbox"/> Developmental Assessment <input type="checkbox"/> Medication-Injection <input type="checkbox"/> Review <input type="checkbox"/> Wound care	<input type="checkbox"/> Blood Pressure Management <input type="checkbox"/> End of Life Care <input type="checkbox"/> Pain Management <input type="checkbox"/> Social Care
---	---	---	---

- Click **Add Activities**

Add Activities

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

Client	Activities	HCP	Main?	
WARD, Courtney (Miss) (1860846)	Advice	WARD, Rachell	⊙	<input type="checkbox"/>
WARD, Courtney (Miss) (1860846)	Assessment	WARD, Rachell	○	<input type="checkbox"/>

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 **Repeat Appointments** section

- Click **Repeat Appointments** to open the section

▶ Repeat Appointments

Allow Repeat Bookings:

Appointment Type:

auto fills

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



Repeat Appointments

Allow Repeat Bookings Appointment Type: FU-F2F Consultation

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 27 Jun 2023

Client/HCP Name Group	Booking Date	Status
▲ WARD, Courtney (Miss) (1860846) - 1860846	<input checked="" type="checkbox"/> 27 Jun 2023 11:10	
	<input checked="" type="checkbox"/> 29 Jun 2023 11:10	
	<input checked="" type="checkbox"/> 6 Jul 2023 11:10	
	<input checked="" type="checkbox"/> 13 Jul 2023 11:10	

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)** section.

- Click **Add Client** (right)

Family Members **Client Search** If the client has Family Members recorded, you will be able to select them on the **Family Members** tab **if not** select **Client Search**.

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 & Waiting List	Transport	Interpreter Required	Proxy Contact	Comments	
1165783	TACUD_Merran (Mrs)	Client	DIGITAL SKILLS TRAINING (DST Total Mobile Training (<input type="checkbox"/>		<input type="checkbox"/>
2510852	TAYLOR_Edwina (Miss)	Client	DIGITAL SKILLS TRAINING (DST Total Mobile Training (<input type="checkbox"/>		<input type="checkbox"/>
No available waiting lists for the selected referral								

- Click **Book**



Booking an Appointment for Multiple Family Members

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

- Click **Add Client** (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.

Client	Participant	Not Invited	Invited	Referred	Referral
TAYLOR, Edwina (Miss) (2510852)	BAYLIS, Subayer (Mr) (2202491)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Referral Not Required
TAYLOR, Edwina (Miss) (2510852)	PICART, Mariuss (Mrs) (1957321)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	Referral Not Required
TAYLOR, Edwina (Miss) (2510852)	TAJUDDI, Lily (Mrs) (2508723)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Please Select

- Click **Referred**
- Select the appropriate **Referral** from the available list
- Click **Add Client(s)**

Client ID	Client	Relationship to Client	Referral & Waiting List	Transport	Interpreter Required	Proxy Contact	Comments
2508723	TAJUDDI, Lily (Mrs)	Half Sibling (2510852)	DIGITAL SKILLS TRAINING (DST Total Mobile Training () No available waiting lists for the selected referral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2510852	TAYLOR, Edwina (Miss)	Client	DIGITAL SKILLS TRAINING (DST Total Mobile Training () No available waiting lists for the selected referral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

- Click **Book**

09:10 - 09:20

TAJUDDI, Lily (Mrs) | [To Outcome](#)

Consultation Medium

TAYLOR, Edwina (Miss) | [To Outcome](#)

Consultation Medium


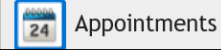

First-F2F Consultation @ Patient's Home

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 **Menu** 
- Click **Appointments** 
- Click **Printable HCP Diary** 



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	25 February 2021 07:00	
End Date	25 February 2021 18:00	
HCP	Aston, Deidre ▼	

OK
Cancel

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

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

Printable HCP Diary

Run Time: 15 May 2023, 12:26 RIO Instance: SPINETEST (Live) Logged in User: WardR01 (Rachell Ward)

Parameters: Start Date = 12 May 2023 09:00, End Date = 15 May 2023 12:26, HCP = Ward, Rachell

Record Count: 3 records returned

Name	Address	Postcode	Date of Birth	Appointment Date	Intended Time	Location	Day Phone Number	Mobile Number	Referral Reason	Intended Activities	Next Immunisation
Miss Edwina TAYLOR	21 Birdbrook Road, Birmingham,	B44 8RE	8 Mar 2022	13 May 2023	09:00 - 09:10	Patient's Home		078965769384	Advice		
Miss Edwina TAYLOR	21 Birdbrook Road, Birmingham,	B44 8RE	8 Mar 2022	13 May 2023	09:10 - 09:20	Patient's Home		078965769384	Advice	Advice Assessment	
Mrs Lily TAJUDDI	23 Birdbrook Road, Birmingham,	B44 8RE	29 Jun 2022	13 May 2023	09:10 - 09:20	Patient's Home		07975323211	Advice	Advice Assessment	

Print
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**



- Click **To Outcome**

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

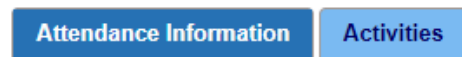
The Clients details are displayed for you to check you are outcoming the correct Client.

- For **Multiple Client** appointments, tick to select the required Client(s) In the middle of the screen

Clients	Specialty	Details	<input type="checkbox"/> Check All
TAJUDDI, Lily (Mrs)	DIGITAL SKILLS TRAINING	No	<input type="checkbox"/>
TAYLOR, Edwina (Miss)	DIGITAL SKILLS TRAINING	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
- Actual Consultation Medium:** Select Appropriate
- Conclusion:** Select Appropriate
- Attendance Comment:** If required
- Reasonable Adjustment Made Indicator** If required

Actual Duration

30 minutes

Seen Time

10:00

Actual Consultation Medium

Face to Face with Client

Conclusion

Attended

Attendance Comment

Reasonable Adjustment Made Indicator

Please Select

Diary



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 would see the example below

Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
TAYLOR, Edwina (Miss)	Advice	WARD, Rachell	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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

- Click **Actual**


If you wish to add further activities

- Select the **Activity** from the list
- Click **HCP** to select HCP
- Click the **Green Plus** 

Activity

- Admission Assessment
- Advice**
- Assessment
- Bereavement Support
- Blood Pressure Management

HCP

BLACK, Jacob 

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

- Click **Main Activity**

Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
TAYLOR, Edwina (Miss)	Advice	WARD, Rachell	minute(s)	No	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
TAYLOR, Edwina (Miss)	Assessment	WARD, Rachell	minute(s)	No	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- Click **Save**
- Click **Close Outcome**



labelling Cancellling 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 e.g., **09:00 - 09:10**

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	
2508723	TAJUDDI, Lily (Mrs)	<input type="checkbox"/>
2510852	TAYLOR, Edwina (Miss)	<input type="checkbox"/>

Cancellation Details

Cancellation Date Time: 15 May 2023 13:21

Cancellation Reason: Please Select

Cancellation Comment: [Text Area]

Cancellation By: WARD, Rachell

[Cancel This Appointment](#)

[Close Cancellation](#)

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: Autofill's 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.

Select Letter

TAJUDDI, Lily (Mrs) 29 Jun 2022 (45 week(s) old) Not Specified NHS, N/A [Icons] [Actions](#)

Letter Template Batch Print Selection

Letter Template: CF-PEYE ORTH Optim NF

[Print](#) [Close](#)



- Click **Close** (unless required)

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

- Click **No** (unless required)
- Click **Close Booking**

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 community visit, if there is no answer at the door, the outcome is recorded as follows.

- Access the **HCP Diary**
- Locate the **Appointment**
- Click **To Outcome**



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

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

- Click **No** (unless required)
- Click Close Outcome






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.

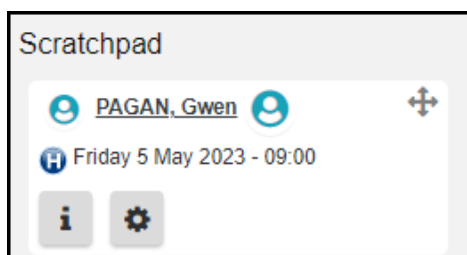
- Click on the **Scratchpad Icon**  (to the left of the Diary)
- **Click & drag** Appointment to Scratch Pad (located on the left)

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 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 letter**

- 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.

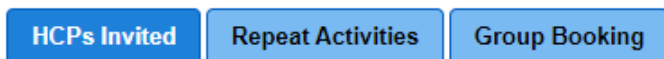
- Click **Book an Activity** at the specific time (Right of Diary slots)

Book Other Activity screen displays

- Start Date:** Autofill's
- Time:** Autofill's
- Duration:** Select time required
- HCP:** Autofill's
- Activity Type:** Type of Activity
- Location:** Location of Activity
- 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 Include in Activity

HCP Name	Include In Activity
DELEGATE, iPad2	<input type="checkbox"/>
DELEGATE, iPad3	<input type="checkbox"/>
DELEGATE, iPad4	<input type="checkbox"/>
DELEGATE, iPad5	<input type="checkbox"/>
DELEGATE, iPad6	<input type="checkbox"/>
DELEGATE, iPad7	<input type="checkbox"/>
DELEGATE, iPad8	<input type="checkbox"/>
DELEGATE, iPad9	<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:	<input checked="" type="checkbox"/>	Activity Type Same as Above	
Frequency	Daily	<input type="radio"/>	Recur every 1 week(s) on
	Weekly	<input checked="" type="radio"/>	Monday <input type="checkbox"/>
	Monthly	<input type="radio"/>	Tuesday <input checked="" type="checkbox"/>
	Yearly	<input type="radio"/>	Wednesday <input type="checkbox"/>
			Thursday <input type="checkbox"/>
			Friday <input type="checkbox"/>

End After 6 Total No. of Repetitions

Or End By a specific date

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 **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 the **Book an activity** link at the specific time (right of diary)

Book Other Activity screen displays

Start Date:	Autofill's
Time:	Autofill's
Duration:	Select time required
HCP:	Autofill's
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.

