# Interactive Worksheet

## Contents



## Overview

The Interactive Worksheet displays a list of clients who are waiting for an appointment to be booked for them.

If you create a referral in Rio, the client will automatically be added to the Interactive Worksheet.

The client will automatically be removed from the Interactive Worksheet once the appointment has been booked and may display on the Interactive Worksheet again depending on the conclusion of their appointment.

## Opening The Interactive Worksheet

- Click the **Menu** button
- Open the **Client Details**  menu
- Click **Interactive Worksheet**

The **Interactive Worksheet** screen will load.

- Select the required team
- Click **Go**

The last refreshed Interactive Worksheet for your team will display.

- Click the **Refresh** button (bottom centre)

An Information prompt will display stating:

'Rebuilding the Interactive Worksheet data can take a while, depending on the amount of data in the database.  Are you sure you want to rebuild now?'

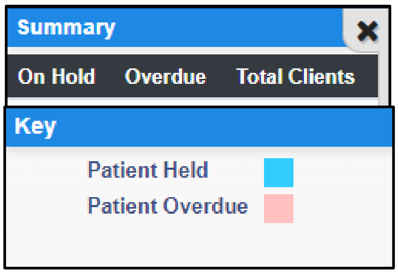
- Click **Yes**

The most up to date client information will now display.

## Viewing the Interactive Worksheet

Most clients should display in White as their appointments are not overdue, clients whose appointments are overdue display in Pink and clients whose appointments are marked as 'on hold' display in Blue.

**Summary** (top left) displays tally boxes to show the number of clients in each category (**On Hold**, **Overdue** and **Total clients)**




**Filter -** allows filtering by **Team**, **Scheduled Date** and/or **Family Name**

**Key** - explains the colours you will see in the Interactive Worksheet

**Patient Held** (Blue) - Patient on holiday etc.

**Patient Overdue** (Pink) - Patient waiting for appointment to be made

Remember clients who are not overdue will display in White

To the **bottom left** of the screen you will see how the number of pages

Use the **arrow buttons** to navigate to the:

First Page    Previous Page    Next Page    Last Page

To the **bottom right** of the screen you will see the total number of clients (items) in the total number of pages of the Interactive Worksheet.

The main part of the screen is laid out in columns and is (by default) sorted alphabetically by the client's Family name.  You can sort any column by clicking on the column heading.

Most of the Columns contain easily recognisable data such as Date of Birth, Gender, Appointment Priority etc.

Notice the Elapsed Time Column; this displays the number of weeks/days the client has been waiting since either the referral was received by the service, or the client's previous appointment.

## Filtering to Find Clients

An easy way to find clients on the Interactive Worksheet is by using a **Family Name** filter.

| | |
|---|---|
| **Team:** | Select the required team |
| **Scheduled Date:** | Select the required date |
| **Family Name:** | Enter your client's Family Name |

- Click **Filter** button to apply filter

You will now see that only clients with the selected Family Name are display on the Interactive Worksheet.

The **Reset** button next to the Filter button will remove any filter data and will reset the Interactive Worksheet to the default settings and display in full again.

## Sorting the Interactive Worksheet

The interactive worksheet may be sorted via any of the columns. This Sort icon  represents the column the data displayed has been sorted by.

- Click the **Sort** icon or any column you wish to sort by

The **Sort By** dialogue box will display.

You can sort by up to three fields (columns) of data and in Ascending (A>Z) or Descending (Z>A) order.

- Click **Apply** (bottom left)

Please note, the Referral Urgency column will display with either Routine or Urgent if the client has not yet had an appointment.

## Action Button Options

There are several actions which can be performed from the Interactive Worksheet screen.

- Find your client by **Filtering** by their **Family Name**
- Click the blue **Action Button** (far right)

There are several options:

- Book Community Appointment
- Book Clinic Appointment
- Hold
- Unhold
- Add Comment
- Edit Comment

Some options may be greyed out; this is because the available options are dependent on the status of the task so may not be available at this time.

You can book both Community and Clinic Appointments from the Interactive Worksheet.

When you book an appointment, the client will be removed from the Interactive Worksheet.

## Booking an HCP Diary Appointment

- Locate your **Client** (you may want to use the **Family Name Filter** to help you find them)
- Click the **Blue Action button** (far right)
- Select **Book Community Appointment**

The **Community Appointment** dialogue box will display.

You will need to tell RiO which HCP you want to book the appointment with.

- Click the **HCP** dropdown**:** Select the required HCP
- **Appointment Date:** Enter the required appointment date & time
- Click the **Ok** button

The **HCP Diary** will open

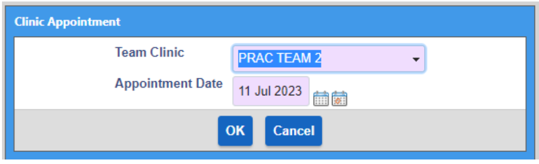
- The Diary will open to the selected HCP and date. Continue to book the appointment as required
- When the appointment has been booked, click the **Back to Interactive Worksheet link** (top left corner)

The **Interactive Worksheet** screen will display.

Because the client now has a booked an appointment, they will no longer display on the Interactive Worksheet.

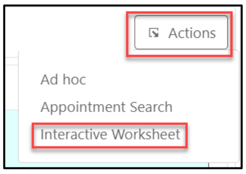
## Booking a Clinic Appointment

- Locate your **client on the** Interactive Worksheet (you may want to use the **Family Name Filter** to help you find them)
- Click the **blue Action button**  (far right)
- Select **Book Clinic Appointment**




The **Clinic Appointment** dialogue box will display.

- You will need to tell Rio which Clinic you want to open
- **Team Clinic:** Select the **required clinic**
- **Appointment Date:** Enter the required appointment date & time
- Click the **Ok** button
- The Clinic will open to the selected Clinic and date. Continue to book the appointment as required
- Return to the Interactive Worksheet via the Actions icon (top right)




The **Interactive Worksheet** screen will display.

Because the client now has a booked Clinic appointment, they will no longer display on the Interactive Worksheet.

## Appointment Outcomes

Before you **Outcome** the **Appointment**, it is **very important** that you understand the importance of selecting the correct appointment **Conclusion**.

Each appointment conclusion will display with a number of days, weeks, or months.  The different time periods determine how long it will be before the client will display on the Interactive Worksheet again.

For example, selecting a conclusion with '3 months' will mean the client will display on the Interactive Worksheet after 6 weeks.  See the examples below:

| Appointment Conclusion | Displays on the Interactive Worksheet |
|---|---|
| 1 Day | Straight away |
| 1 Week | Straight away |
| 1 Month | Straight away |
| 3 Months | After 6 weeks |
| 6 Months | After 18 weeks |
| 12 Months | After 46 weeks |

Additionally, any **Attendance Comment** entered on the **Attendance Indicator** screen when outcoming the appointment will display in the **Comments** field on the Interactive Worksheet screen.

Entering attendance comments can be a useful way to indicate which HCP or Clinic the client needs to be booked with, items which need to be checked before booking etc.

The client will be automatically removed from the Interactive Worksheet when their referral is discharged.

## Placing a Client 'On Hold'

A client can be put on hold if they are not available to attend their appointment. This will prevent client's having appointments booked for them while they are unavailable (away on holiday etc.).

- Locate your **Client**
- Click on **Blue Action Button**
- Select **Hold**

The **Interactive Worksheet – Hold** screen will display.

The Team, Date & time referral received and Client Name fields will already be completed.

- Select the **Hold Date:** Enter start date
- Enter a **Comment**: Enter relevant information e.g. on holiday for 3 weeks
- Click **Update** (bottom centre)

The **Interactive Worklist** screen will now display.

You will see that your **client** now displays in **blue** which indicates they are 'On Hold'.

Your comment will display in the **Comments** field.

## Removing a Client from Hold

- Locate your **Client**
- Click on **Blue Action Button**
- Select **Unhold**

The **Interactive Worksheet – Remove Hold** screen will display.

- Enter a **Comment**: Enter relevant comment e.g. holiday cancelled
- Click **Update** (bottom centre)

Your client will now display on the Interactive Worksheet and the **Comment** column is updated.

## Adding a Comment

Comments can be entered via the Attendance Indicator screen when outcoming an appointment or directly into the Interactive Worksheet.

- Locate your **Client**
- Click on **Blue Action Button**
- Select **Add Comment**

The **Interactive Worksheet – Comment** screen will display.

The Team, Date & Time referral received, and Client Name fields will display at the top of the screen.

- **Comment**: Enter relevant information e.g., Morning visits only
- Click **Update** (bottom centre)

The **Interactive Worklist** screen will now display.

Your comment will display in the **Comments** field. If the comment is longer than 10 characters, you will see **...** display at the end of the comment.

- Hover over the **...** to view the comment in full
- Click **...** to display the comment in full in a pop-up box.

## Editing a Comment

Comments can be edited at any time.

- Locate your **Client**
- Click on **Blue Action Button**
- Select **Edit Comment**

The **Interactive Worksheet – Comment** screen will display.

The Team, Date & Time referral received, and Client Name fields will display at the top of the screen.

- **Comment**: Edit existing comment
- Click **Update** (bottom centre)

The **Interactive Worklist** screen will now open, and the amended comment will display in the **Comments** field.