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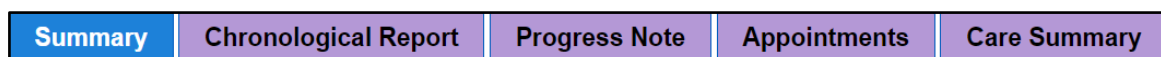
Overview

The Clinical Portal – Client’s View screen is undergoing a brand-new look, that provides users access to key information on one summary page.

Viewing the Tabs

- Select **Menu**
- Select **Quick Menu**
- Select **Client’s View**
- Search and Open your Client’s record
- The **Clinical Portal – Client’s View** screen will display

Current tabs are displayed. (These may vary depending on your Job Role)



+

Summary

Chronological Report

Progress Note

Appointments

Care Summary

Indicators

22 Nov 2024

Conditions

A

Summary Alert Indicator

22 Nov 2024

Consent Not Indicated

L

Summary Condition Indicators

Conditions

Consent Not Indicated

L

Reasonable Adjustments 2

Consent Not Indicated

Reasonable Adjustment

L

R

Demographics

Full Name

ClientID

COVID 19 Status

Gender

Full Address

PostCode

First Language (If Not English)

Interpreter Required?

Interpreter

Registered GP

Miss Courtney EDWARDS

1000562

No status recorded

F

10 Short Street, Halesowen, B63 3UH

English

Not required

Not Required

LOFTUS CE

Navigation

Case Record

CR - Care Plan

CR - Referrals

CR - Documents

CR - Mental Health

Clinical Coding Assessment Form

Childrens and Families Assessment Forms

BCHC Generic Assessment Forms

Dependency Level Assessment Form

Learning Disabilities Assessment Forms



Adding Further Rio Tabs

- Click 

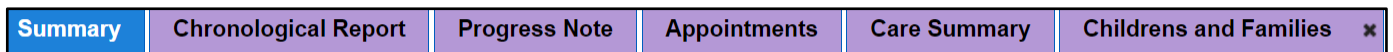
Additional tabs are displayed on the **Clinical Summary Selector**

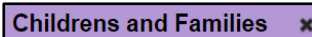
- Click ☒ **Childrens and Families Divisional** tab
- Click 

The new tab will be displayed to the right of the current tabs

Clinical Summary Selector

- ☒ **Appointments**
Past and Upcoming Appointment
- ☒ **Chronological Report**
Chronological Report
- ☒ **Progress Note**
Progress Note
- ☐ **Childrens and Families**
Childrens and Families
- ☐ **Clinical Summary**
Clinical Summary



- Select 

Once selected, the tab colour changes to blue

This **C & F Divisional tab displays** more information relating to the Client within individual panes. These panes have vertical scroll bars (bottom right of pane)



Maximising the Pane

Some panes will have an option to maximise

- Click 

The whole pane will display

- Click 

The pane has now returned to its original view

Client Family 	
ClientID	Client Name (Relationship)
1000835	EDWARDS, Joseph - Parent



Updating/Editing Client Details

If the pane displays a hyperlink (underlined text) this will directly access the screen for the user to update/edit the information

Client Personal Contacts				
Rank	Type	Relation	Name	Main phone
1	Next of Kin	Father	SMITH John	0751845784587

- Click **Client Personal Contacts**

A new tab displays to the right of the Rio Tabs (top left of screen)

IMPORTANT - ALWAYS CHECK YOU HAVE THE CORRECT CLIENT'S RECORD BEFORE UPDATING/EDITING

EDWARDS, Courtney (Miss) 18 Aug 2014 (10 year(s) old) Female NHS. 941 022 4284											
Rank	Type	Relation	NHS Number	Family Name	Given Name	Address	Main phone	Email	Start Date	End Date	Correspondence
1	Next of Kin	Father		SMITH	John	10 Short Street	0751845784587		1 Nov 2013		Correspondence Edit
2	Friend or Relative (Has contact with the patient)	Next of kin		EDWARDS	Jenny	10 Short Street					Correspondence Edit
Add New Contact											

- Click **Add New Contact** (bottom centre)

Complete the details as required

- Click **Save**
- Click **New Rio Tab X**

This will close the tab



Using the Client Overview

Users can see all the information via the Overview button

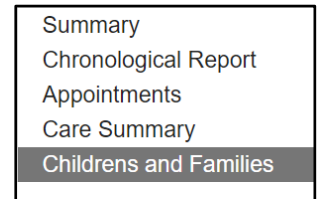
- Click **Overview**



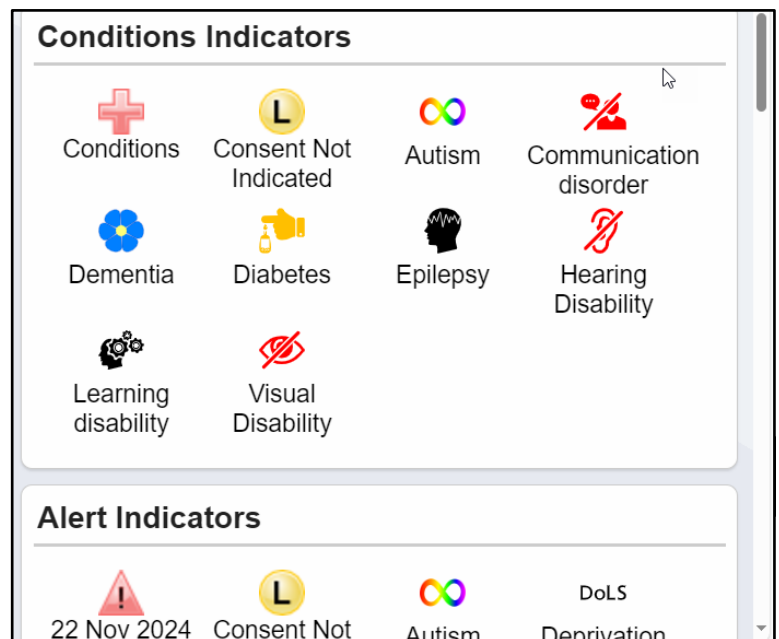
The **Client Overview** will display

- Click

Select the title of the pane you wish to view



The user can view all contents of each pane via the vertical scroll bar (right side of pane)



Closing the Client Overview

- Click **Close**