Team Caseload

Contents

The Team Caseload displays all Clients with an active Referral to the Team. The Team Caseload screen allows users to quickly locate Clients, access Client records and information and book Clinic and Diary appointments.

Accessing the Team Caseload

- Click **Menu**

- Click **Client Details**

- Click **Team Caseload**

Filtering the Team Caseload

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

Select **Team Name** to view all Clients with an Active Referral (this screen will auto refresh if you select a different team)

Filters (allows you to filter on one of the headings)

Enter **Client's Family Name** here to find any Clients with this specific Family Name

Select a **HCP** to view all Clients who are on the selected HCP's caseload

Select a **Waiting List** to view all Clients who are on the selected Waiting List

Clicking the **Go** button will give you the results of the filter you have chosen

Sorting the Team Caseload

The Team Caseload can be sorted on the following headings:

Client	Post Code	Start Date	Next Review	Inpatient Location	HCP	Referral Urgency	Next Appointment	Waiting List(s)

Click ▲ for Ascending Order (A > Z)

Click ▼ for Descending Order (Z > A)

Viewing Client Information from the Team Caseload

- Click 🔵 to display **Person Information** about the Client

Person Information

COVID - 19 Status	No status recorded	Consultation Medium	
Full Name	Mrs Sabina Sibyl ADAIR	Client Email	
ClientID	2642938	Birmingham Shared Care Record	View client shared care record
Date Of Birth	28 Feb 1947	YCC Availability	Yes
NNN	9657695503	First Language (If Not English)	English
Gender	F	Ethnicity	Client Ethnicity Not Recorded
Full Address	10 West Heath Road, Winson Green, Birmingham,	Interpreter Required?	Not required
		School	
PostCode	B18 4DL	Registered GP	ADELSON N
Client Telephone		Registered Dental Practice	Unknown
		LD HONOS Alert	
Evening Tel. Number	Unknown	Care Co-ordinator	None
Mobile Tel.Number	Unknown	CPA Level	None
Patient Communication Preferences	SMS Consent Not Recorded | Research Consent Implied	Current Inpatient (Y/N)	No
		Last 3 users to access record	Janice, Pettitt | Total, Mobile | iPad9, Delegate |

Close

- Click <u>Client's Name</u> to access their Clinical Portal – Client's View

Client	Post Code	Start Date	Next Review	Inpatient Location	HCP	Referral Urgency	Next Appointment	Waiting List(s)
🔵 AANTU, Nagawo Nagawo Nagawo Nagawo Nagawo (Mr)	ZZ99	1 Apr 2023		-		Routine	-	↘
🔵 ADAIR, Sabina Sibyl (Mrs)	B18 4DL	1 Jun 2023		-		Routine	5 Jul 2023, 08:00	↘
🔵 AVERY, Ann (Ms)	B44 8RE	1 Jun 2023		-		Routine	5 Jul 2023, 08:00	↘

- The **HCP** column displays the name of the Clients allocated Health Care Professional
- The **Next Appointment** column displays the details of the next appointment
- The **Waiting List(s)** displays any waiting list the Client is currently on

Actions from the Team Caseload

There are five actions available from the Team Caseload which are accessed via the **Action Button**

View Other Professionals	Lists any other HCP who has the Client on their Caseload
View Appointments	Lists past or future appointments for the Client with your team
Book Clinic Appointment	Allows direct access to the Clinic to book an appointment for the Client
Book Community Appointment	Allows direct access to the HCP Diary to book an appointment for the Client
Create Bed Request	Allows user to create a bed request for an Inpatient unit within BCHC **(NOT used in Trust currently)**

Navigating Pages in the Team Caseload

The Team Caseload can be multiple pages long and can be viewed page by page using the page

Result page: First < Previous 1 2 3 4 5 6 Next > Last   Total pages: 6

selectors (bottom of the page)

Hyperlinks to Other Functions

Located at the foot of the screen you will find hyperlinks to other Rio Functionality. They are the

HCP Diary & Caseload

Clicking on either of the hyperlinks will take you directly to that screen