Team Caseload



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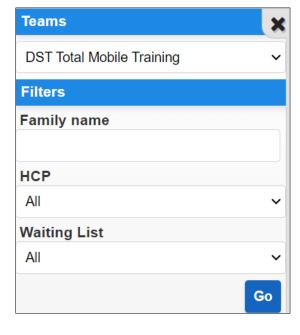
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The Team Caseload displays all Clients with an active Referral to the Team. The Team Caseload screen allows users to quickly locate Clients, access Client records and information and book Clinic and Diary appointments.

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

Team Caseload



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 Ascer	nding Order ((A > Z)						
Click for Desc	ending Order	(Z > A)						

Viewing Client Information from the Team Caseload

Click to display Person Information about the Client

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

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	-		Î
ADAIR, Sabina Sibyl (Mrs)	B18 4DL	1 Jun 2023		-		Routine	5 Jul 2023, 08:00		<u> </u>
AVERY, Ann (Ms)	B44 8RE	1 Jun 2023		-		Routine	5 Jul 2023, 08:00		<u> </u>

- 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



Team Caseload



Actions from the Team Caseload

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



View Other Professionals
View Appointments
Book Clinic Appointment
Book Community Appointment
Create Bed Request

Lists any other HCP who has the Client on their Caseload

Lists past or future appointments for the Client with your team

Allows direct access to the Clinic to book an appointment for the Client

Allows direct access to the HCP Diary to book an appointment for the Client

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: <u>First < Previous 1 2 3 4 5 6 Next > Last Total pages: 6</u> 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