Caseloads

Contents

Overview

The individual HCP (Health Care Professional) Caseload shows all allocated Clients for a particular HCP. The Caseload screen allows users to quickly locate Clients, access Client records and information and book Clinic and Diary appointments.

Accessing the HCP Caseload

- Click **Menu**
- Click **Quick Menu**
- Click **Caseload**

You can also access the HCP Caseload using the **<u>Caseload</u>** link found at the bottom of the HCP Diary and Team Caseload screens

HCP Caseload Overview

Filtering the HCP Caseload

View the **HCP/Filters** pane (left of the screen)

HCP: displays *your* name by default, but you can view the Caseloads of other team members by selecting their name from the list

Filters: place a tick ☑ to select **All**

- **Alloc. & Care co-ordinator** and **Care co-ordinator** are only applicable to Learning Disabilities division
- **Referred**: Clients directly referred to an individual
- **Allocated**: Clients allocated to your Caseload
- **Team Referral**: Clients who have not been allocated
- **Discharged**: Clients who have died and who's record has been synchronised with the Spine

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

Team: allows you to view caseloads for other teams you work for

Clicking the **Go** button will apply any filters or changes you have made

- Click [✖] to **Close** Filter Pane
- Click [▼] to **Open** Filter Pane

The main area of the screen will display the Client, Team who has the referral, Client's Postcode, Start Date of the Allocation and the Urgency and the Client's Next Appointment. You can also see if a Client is on a Waiting List.

Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment	Waiting List(s)		
ALENIZE, Simrenjit (Mr)	CFPAED CCS Team	ZZ99	22 Nov 2021		-	Routine	-	✚	🔲	☐
AMAYA, Wanjun (Mr)	CFPAED CCS Team	ZZ99	21 Aug 2019		-	Routine	-	✚ CPAEDFU52	🔲	☐
BELO-OSAGIE, Phoebe-Louise (Miss)	CFPAED CCS Team	ZZ99	22 Nov 2021		-	Routine	-	✚ CPAED89	🔲	☐

Sorting the HCP Caseload

The Caseload displays in alphabetical order of the Client's Family Name, however the information can be sorted by clicking on White triangles within the Column Headers

Viewing Client Information from the HCP Caseload

- Click [icon] to display the Person Information about the Client

- Click the **Client's Name** link to access the Client's record

Caseload Actions

- Click the blue action button [icon] (far right of the Client's information)

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
View Allocation	Displays Allocation History
View Referral	Displays the Referral Information
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

Deceased Clients

If a Client displays as 'Discharged' you will see the colour changes to green and a black diamond icon alongside the Client's Name. This Client is deceased and will need to be removed from the individual HCP Caseload.

Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment	Waiting List(s)	☐
ACEY, Nancie-Rae (Mr)◆	IMT Northfield DN	ZZ99	14 Jan 2023		-	Routine	-	[icon]	☐

Removing Deceased Client

- Click checkbox ☑ (far right)

- Click **Remove** button (bottom of the screen)

Caseloads

First Allocations from the Generic (Lead HCP) Caseload

The Generic (Lead HCP) Caseload shows all Clients with a Referral to the Team. Any initial Client Allocation **must** be made from this screen.

To access the Generic (Lead HCP) Caseload from the Caseload screen

- Select **Generic** Team (Lead HCP) Name from the HCP dropdown list (top left)
- Click **Go**

The Generic (Lead HCP) Caseload now displays

Allocating an Individual Client to an HCP Caseload

- Enter the Client's **Family Name** into the Family Name field
- Click the **Go** button
- Click
- Click **Allocate**

Family Name

TEST ✕

The **Caseload Allocation** screen now displays

- **Allocate to HCP**:   Select the appropriate HCP from the list
- **Allocation Date**:   Complete as required
- Click **Save**

The Client will no longer display on the Generic (Lead HCP) Caseload

Return to the individual HCP Caseload to see the newly allocated Client has been added

Bulk Allocation

Bulk Allocation allows users to allocate Multiple (or individual) Clients at the same time. Please note that you are unable to set the date of allocation with this option. The allocation date will always default to 'today'.

In Generic (Lead HCP) Caseload

- Click to place a tick ☑ to select the Client(s)
- Click the **Allocate** button (bottom)

The **Bulk Allocation** screen will display

- **HCP**: select the appropriate HCP from the list
- Click the **Allocate** button (bottom)

The Client will no longer display on the Generic (Lead HCP) Caseload. Return to the individual HCP Caseload to see the newly allocated Client(s)

Reallocating/Sharing Client(s)

You may need to reallocate the Client to another HCP or back to the Generic (Lead HCP's) caseload or even share the Clients care with another HCP

- Click **Menu**

- Click **Client Details**

- Click **Caseload Transfer/Allocation**

The **Caseload Transfer/Allocation** screen displays

- **Team**:   Select your **Team**

Team	Select	Go	HCP	Select	Go

Please note you MUST NOT select the HCP's name at this point

- Click the first **Go** button

- **Team**:   Defaults to the team selected

- **Allocate From**:   Select the name of the HCP you are transferring/reallocating from

Team	DST Total Mobile Training
Allocate From	Select

A list of all the Clients currently on the HCP's caseload will display

- **Allocate To**:   Select the person you wish to reallocate to/share with

- **Start Date**:   Complete as required

Team	DST Total Mobile Training	
Allocate From	DELEGATE, iPad1	
Allocate To	DELEGATE, Ipad2 / DELEGATE, Ipad3 / DELEGATE, Ipad4 / DELEGATE, Ipad5 / DELEGATE, Ipad6 / DELEGATE, Ipad7 / DELEGATE, Ipad8	Start Date: 2 May 2023 / Comment

Name	Address	DOB	Referral	Share ☐	Reallocate ☐
GERARD, Martin (Mr)	229 Somerville Road B10 9DD	10 May 1978	DIGITAL SKILLS TRAINING on 3 Apr 2023, 09:00	☐	☐
TAZSDA, Laduben (Master)	Not Known ZZ99	12 Sep 2021	DIGITAL SKILLS TRAINING on 6 Mar 2023, 09:00	☐	☐
TWIST, Carl (Mr)	105 Ombersley Road B12 8UU	18 Jul 1972	DIGITAL SKILLS TRAINING on 1 Mar 2023, 09:00	☐	☐
UNWIN, Gideon (Mr)	1 Park Road B18 5JH	14 Sep 1986	DIGITAL SKILLS TRAINING on 1 Mar 2023, 09:00	☐	☐

- Locate the Client(s) you want to reallocate or share in the Client list

- Click to select **Reallocate** ☑ or **Share** ☑ for the Client(s)

- Click **Allocate Caseload Item(s)** bottom

You will see **Allocation status: Transfer Successful** message at the top of your screen and the Client(s) will be Reallocated or Shared to the selected HCP's Caseload

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