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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

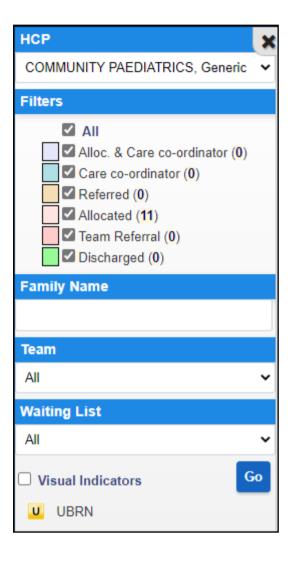
- Alloc. & Care co-ordinator and Care co-ordinator are only applicable to Learning Disabilities division
- o Referred: Clients directly referred to an individual
- o Allocated: Clients allocated to your Caseload
- Team Referral: Clients who have not been allocated
- Discharged: Clients who have died 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

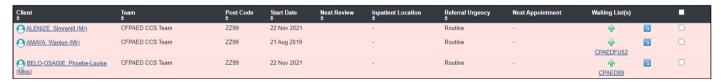
Team: allows you to view caseloads for other teams you work for

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.



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 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 (far right of the Client's information)

| View Other Professionals |
|----------------------------|
| View Appointments |
| View Allocation |
| View Referral |
| Book Clinic Appointment |
| Book Community Appointment |

Lists any other HCP who has the Client on their Caseload

Lists past or future appointments for the Client with your Team

Displays Allocation History

Displays the Referral Information

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

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 Ap pointme nt | | • |
|---------------------------|-------------------|--------------------|---------------------|----|---|---------|--------------------------|--|---|
| ACEY, Nancie- Rae (Mr) | IMT Northfield DN | ZZ99 | 14 Jan 20 | 23 | - | Routine | - | | |

Removing Deceased Client

- Click checkbox ☑ (far right)
- Click **Remove** button (bottom of the screen)





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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.

Family Name

TEST

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 Allocate

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 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



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



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



| 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 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

