



Contents

Overview.....	1
Accessing the Daily Team Planner	1
Filtering the Daily Team Planner	1
Adding Clients to the Daily Team Planner.....	2
Allocating the Task to a Health Care Professional.....	3
Removing a Health Care Professional	4
Editing a Task	4
Cancelling a Task	5

Overview

The Daily Team Planner (DTP), allows a team to build a list of Clients who need to be seen by the team. These 'tasks' can then be scheduled as Community Appointments with HCP's (Health Care Professionals) within the team.

For some services, the Daily Team Planner (DTP) is used alongside external systems which use other information such as the Teams Rota & HCPs competency levels to help decide which HCP sees which Client.

Accessing the Daily Team Planner

- Click **Menu**
- Click **Client Details**
- Click **Daily Team Planner**
- Select your **Team**
- Click **Go**

Filtering the Daily Team Planner

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

- **Team:** select the specified team
- **Date:** select the required date
- **Family Name:** enter a Client's Family Name to filter and locate individual Client in DTP
- **Appointment Type:** default display is ☒ Booked and ☒ Unbooked tick to select/deselect
- **Filter button:** applies changes
- **Reset button:** resets to default settings



Adding Clients to the Daily Team Planner

- Ensure you are on the correct Date
- Click the **Add Client** button (bottom left)

This **Search** screen opens

- Enter the Client's details and search for them

The **Add to Daily Team Planner** screen displays. The Client's grey banner bar shows at the top of the screen.

Complete the fields as required.

Example - Our Client requires Wound Care daily for 7 days, preferably a morning visit

- **Referral:** Will autofill with the team's referral
- **Appointment Comment:** Wound Care (Right Leg)
- **Intended Activities:** *AM Visit ☒, Wound Care ☒
- **Book Repeat Appointments:** ☒
- **Total No. Of Appointments:** 7
- **Daily:** ☒
- **Daily every 1 day(s):** ☒

Team	Birmingham Healthcare	Date	15 Feb 2021	Day	Monday
Referral	Birmingham Healthcare : 15 Jul 2013				
Appointment Comment	Wound Care (Right Leg)				
Intended Activities	☐ End of Life Care ☐ Enuresis assessment ☐ Health Education ☐ Health Promotion ☐ Home Assessment ☐ Immunisation given ☐ Joint Review with HCP ☐ Medication - Administrat ... ☐ Medication-Advice ☐ Pain Management ☐ Palliative - Symptom Con ... ☐ Reassessment ☐ Respiratory-Assessment ☐ Review ☐ Treatment ☒ Wound Care - Simple (Mul ...				
Book Repeat Appointments	☒				
Total No. of Appointments	7				
Frequency	☒ Daily ☐ Weekly ☐ Monthly ☐ Yearly				
	☒ Daily every 1 day(s) ☐ Every Weekday				

- Click **Add** (bottom of screen)

Daily Team Planner



The Client will now be added to the DTP as a 'task' for the number of days specified in the repeat schedule you have created for them. If the Client needs to be seen multiple times in the same day, they will need to be added to the DTP for each time they need to be seen.

Freq	Client	HCP	Time	Location	Comment		
	 WALKER, Ethan				Wound Care ...		☐

- Hover over the First Appointment  to view how many further appointments are added to the DTP

Key

Fully Booked (0)		Unbooked (1)	
Outcomed (0)		On Scratch Pad (0)	
First Appointment		Last Appointment	
Repeating			

The Key is located on the left-hand pane of the screen and can be used to determine status of task added to DTP. In this case, 'Unbooked' task.

Allocating the Task to a Health Care Professional

Each task added to the DTP needs to be placed in a specified HCP's Diary:

- Click ☒ to select the task/s
- Click **the Place in Diary** button
- The **New Daily Team Planner Appointment** dialogue box displays
- ALWAYS click **Automatic** ⦿
- Complete the pink mandatory fields

- **HCP:** select the required HCP
- **Intended Consultation Medium:** select as required
- **Location:** Select the required location
- **Duration:** Select the required duration
- **Appointment Type:** Select the required appointment type

New Daily Team Planner Appointment

HCP	WILSON, Alexandra (Ms)	
Location	Patient's Home	
Duration	30 minutes	
Appointment Type	FU-F2F Consultation	
Name	AM / PM	Earliest / Latest
TACUD, Rishikesh	☒ AM ☐ PM	☒ Earliest ☐ Latest

- Click ☒ **AM/PM** as required to indicate if this is an AM or PM visit
- Click ☒ **Earliest/Latest** as required to indicate if the Client needs to be seen at the earliest or latest time
- Click **OK**

Daily Team Planner



The colour of the task changes. This is now a **Fully Booked** appointment.

The allocated HCP's name, Time & Location of the Appointment is displayed on the DTP

Freq	Client	HCP	Time	Location	Comment		
	WALKER, Ethan	ASTON, Deirdre	08:00	Patient's Home	wound Care ...		☐

Hover over the ellipses (...) next to the comment to display full details of the comment

Removing a Health Care Professional

If the HCP is unable to carry out the appointment added via the Daily Team Planner the task can be removed from that HCP and given to another HCP

Freq	Client	HCP	Time	Location	Comment		
	OYEBODE, Oyiniola				Eye Drops ...		☐
	OYEBODE, Oyiniola				Eye Drops ...		☐
	WALKER, Ethan	HALL-GREEN, Jonathan	08:00	Patient's Home	Wound Care ...		☒

- Click ☒ for specified task
- Click the **Remove HCP** button (bottom)

The **Remove HCP** dialogue box displays complete as required

- **Reason:** select relevant reason
- **Date:** enter date
- Click the **Remove HCP** button

Remove HCP

Reason Provider - Priority change

Date 17 Apr 2023

Remove HCP

Abort

The task will display in the green 'unbooked' colour. It will now need to be allocated to a different HCP.

Editing a Task

If a task needs to be edited this can be done via the blue action button:

- Click
- Click **Edit**

You can add/delete information to the appointment comment or add/delete activities to the task; you are unable to edit the schedule of the tasks

View
Edit
Cancel

- Click **Update**



Cancelling a Task

If a task needs to be Cancelled this can be done via blue action button:

- Click 
- Click **Cancel**



The **Cancel Team Planner Appointment/Allocation** screen opens

Start Date:

Date	Time	HCP	Location	Appt Comments	Select All
Mon 17 Apr 2023				Wound Care (RL)	☐
Tue 18 Apr 2023				Wound Care (RL)	☐
Wed 19 Apr 2023				Wound Care (RL)	☐
Thu 20 Apr 2023				Wound Care (RL)	☒
Fri 21 Apr 2023				Wound Care (RL)	☐
Sat 22 Apr 2023				Wound Care (RL)	☐
Sun 23 Apr 2023				Wound Care (RL)	☐

Cancellation Details

Cancellation Date:

Cancellation Reason:

- Click ☒ to select the required task(s) to be cancelled

Note: If a new schedule is required, tick **Select All** at the top of the screen to select all tasks to be cancelled

- **Cancellation Date:** enter date/time
- **Cancellation Reason:** enter required reason
- Click **Cancel Appointments** button

An Information dialogue box displays asking if you are sure you want to cancel the appointment

- Click **Yes**

The Daily Team Planner screen displays. The selected task for the date specified does not show as it has been cancelled.