Team Caseload

Contents

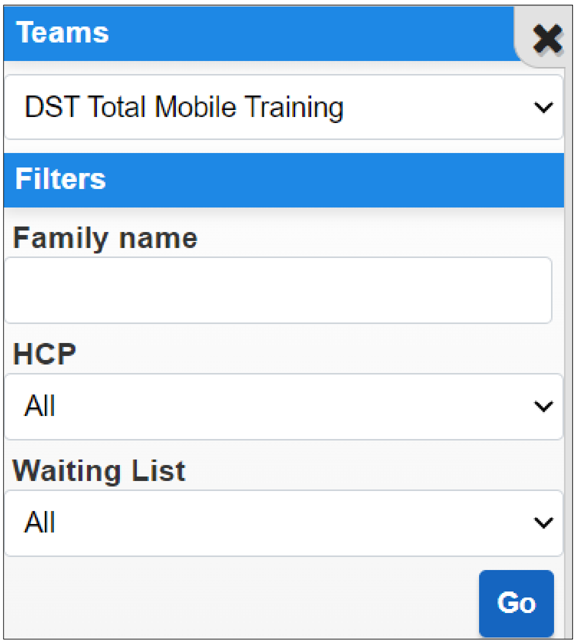
Overview

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 (the information to the right will auto refresh if you select a different team)

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

Enter a 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/s 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

Click for Ascending Order (A > Z)

Click for Descending Order (Z > A)

Viewing Client Information from the Team Caseload

- Click to display the **Person Information** for a 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	
		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**
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 **Close** to return to the Team Caseload
- Click a **Client's Name** link to access their Clinical Portal – Client's View screen

ANUMEL, Zoe-Ann Zoe-Ann Zoe-Ann Zoe-Ann Zoe-Ann (Mr)	ZZ99	18 Jun 2025	-		Routine	-	Transfer		
ASHBY, Sian Ann (Mrs)	ZZ99	1 Apr 2025	-	DST TM TRAINING, Generic	Routine	20 Jun 2025, 14:20	Transfer	DSTFU	
BAND, Gemma Alexi (Mrs)	B6 6LD	1 Apr 2025	LD Inpatients	WARD, Rachell	Routine	20 Jun 2025, 14:20	Transfer		

- 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 next column contains **Transfer** links allowing you to transfer a Client's referral to another team within your specialty
- The **Waiting List(s)** displays any waiting list the Client is currently on

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Actions from the Team Caseload

There are 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
View Allocation	Takes you to the Allocation History for the Client
View Referral	Opens the Referral for the Client
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 selectors (bottom of the page)

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

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