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## Overview

The Clinic Appointment screen allows a user to view Clinic information in a variety of layouts and perform different functions. You can book and outcome appointments for an individual, multiple Clients and even a group of Clients.

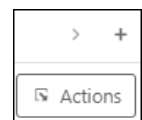
## Opening Clinics

- Click **MENU**
- Click **Quick Menu or Appointments**
- Click **Clinic Appointments**

Any previously opened Clinic(s) will display automatically. If you have no open Clinics, you will be prompted to select one from a picklist

You may have several Clinics open at the same time

- To open a Clinic, click the **grey Plus** (top right, above Actions)

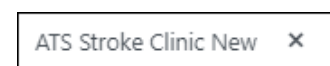


The **Please select a clinic** dialogue box will display

- Click the **Clinic** drop-down
- **Locate** and **select** your Clinic
- Click **OK**

The Clinic screen now displays and will open at the last date that this Clinic was accessed

The name of the Clinic displays on the top, with a Close option to the right of the tab.





## Clinic Screen Overview

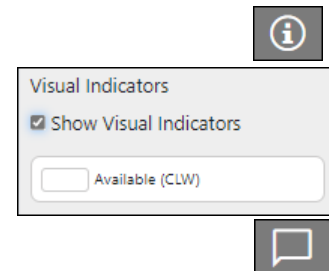
### Show/Hide Option Panel, Buttons and Visual Indicators



The Clinic screen will open displaying the various options on the left in a column

The Calendar option is normally auto selected (See Clinic Date Options section for full Calendar details)

- Click the **Visual Indicators** icon to reveal the Key for the colours
- Click the **Show Visual Indicators** tick box to reveal the text codes
- Click the **Show Visual Indicators** tick box ☐ to remove the tick and hide the text codes
- Click the **Comments** icon to reveal any Comments



There are two types of Comments:

Clinic Comment which is added when the Clinic is built and displays for every instance of the Clinic

Day Comments which can be completed with information relevant to that specific day.

- Click the **Edit** button to add a Day Comment, then click the **Save** button
- Click the **Scratch Pad** icon to reveal the Scratch Pad (see Rescheduling a Clinic Appointment below for more information)
- The Trust does not use the **Unscheduled** functionality
- Click the **"X"** button to hide the Options Panel



## Clinic Views

### Stream View

This is the default View for Clinics. A Clinic may have several Streams; these could be for each individual room at a Clinic Venue or for each HCP working in the Clinic


- Click the **Streams** button (top left) to display the Clinic in **Stream View**

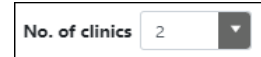
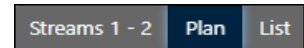




## Plan View

Plan View allows you to see multiple Clinics for future dates

- Click the **Plan** button (top left) to display the Clinic in **Plan View**
- Click the **No. of clinics** drop-down (middle) to choose the number of Clinic dates you want to display
- Click the **Next** button (top right) or **Prev** (previous) button (top left) to scroll through the Clinics
- **Display Client**  displays booked appointments

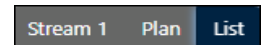


Plan View hides the Client information unless you hover over a purple block

## List View

List View displays appointments in a list format:

- Click the **List** button (top left) to display the Clinic in **List View**



Appointments are arranged by appointment time

Appointment letters can be generated from this view

Allows staff to Arrive Clients / Patients

Allows users to Print a Clinic List

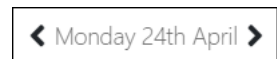
## Date Options

The selected Clinic date will display above the Stream/s

The **Single arrow to the left** takes the date back 1 Clinic day

The **Single arrow to the right** takes the date forward 1 Clinic day

The **Today** button changes the date to "Today"



## Refresh Button

The Refresh button allows you Refresh the current screen



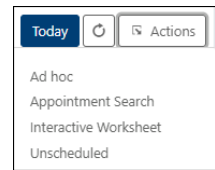
- Click the **Refresh** button (top right) to reload the screen with updated information e.g. View new Arrival data



## Actions Options

The **Actions** button offers a selection of other functions

- Click the **Actions** button (top right) to see the various options



The **Ad hoc** link allows users to access an HCP Diary and book a Community Appointment. This link does not display for all users

- Click the **Ad hoc** link, select the required **HCP** from the list, click **OK**



The **Appointment Search** link allows users to search for an Available/Booked/Other Activity appointment. See the

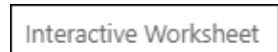


Appointment Search section for full details

- Click the **Appointment Search** link

The **Interactive Worksheet** link allows users to open the Interactive Worksheet for their team. The Interactive Worksheet is a list of Clients who have an open referral to the team and are waiting for an appointment. The Interactive Worksheet link will only display for Services who use this functionality

- Click the **Interactive Worksheet** link



The Trust does not use the **Unscheduled** functionality



## Clinic Date Options and Search Appointment

The **Calendar** button allows the user to change the date in a variety of different ways

- Click the **Calendar** icon (left)

The **Clinic Date** allows the user to free-type a date, then press **Enter**

The **Today** button changes the date to “Today”

The **Double arrow to the left** takes the date back 5 Clinic days

The **Single arrow to the left** takes the date back 1 Clinic day

The **Single arrow to the right** takes the date forward 1 Clinic day

The **Double arrow to the right** takes the date forward 5 Clinic days



Clinic Date

« ‹ Today › »

The **Calendar** options allow the user to change the day, month and year

< Jun 2023 >

June 2023

Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

The **Clinic Day** allows the user to select the previous or future Clinic dates

Clinic Day


The **Weeks in Advance** allows the user to search for Clinics up to 26 weeks in advance of the displayed Clinic date

Weeks in Advance



## Booking a Clinic Appointment

If you are assigned to a Service specific Clinic this will display. If not, follow the **Opening Clinics** section of this guide

- Ensure the **required Clinic** is displaying for the **correct date**
- Locate the required **Stream** and **time** of the appointment to be booked
- Click the **grey Action**  icon (far right)
- Click **New Appointment**
- **Search** for the Client you wish to book into the appointment

The **Book Appointment** screen will display

There are 5 sections to complete

The **Appointment Details** section will display at the top of the screen

Appointment Details

Date	9 Oct 2023	Time	13:00	Intended Duration	1 hour	Intended Consultation Medium	Face to Face with Client
HCP	Please Select	Urgency	Please Select	Type			
Clinic	BCHC Clinic 01						First Appointment
Comments							

Complete as required.

- **Date:** Autofills (Mandatory) – amend if required
- **Time:** Autofills (Mandatory) – amend if required
- **Intended Duration:** Autofills (Mandatory) – amend if required
- **Intended Cons. Medium:** Complete as required
- **HCP:** Leave blank if the HCP is unknown at time of booking or select if required
- **Urgency:** Complete as required
- **Type:** Select required appointment type **(See\*)**
- **Clinic:** Autofills (Mandatory)
- **Comments:** Complete if required

### \* **Please Note**

A patient can only ever have one First Appointment Type with a team. Any further appointments will need to be Type of Follow Up.



## Client(s) Section

▼ Client(s)

Client ID	Client	Relationship to Client	Referral & Waiting List	Transport	Interpreter Required	Proxy Contact	Comments
1000562	EDWARDS, Courtney (Miss)	Client	Please Select			<input type="checkbox"/>	

Ad hoc Client  for

☐ Transport Required ☐ Carer Appointment **Add Client** **Remove Client(s)**

**Add**

Key

- Interpreter Required
- Interpreter Not Required
- Interpreter Booked
- Interpreter Cancelled
- Transport Required
- Transport Not Required
- Transport Booked
- Transport Cancelled

This section displays the Client's name and most importantly the Referral information. It also allows for indication that an Interpreter needs to be booked, cancelled, is required and multiple Clients to be added to the appointment (if required).

## Adding an Interpreter

- Click the **Green Plus Symbol** below **Interpreter Required**

The **Please choose Interpreter options for this Client** dialogue box will display

- Interpreter Required is auto selected ☒
- Language:** Select Language
- Comments:** Complete if required
- Click **Save**

Please choose Interpreter options for this Client

Choose Options

☐ Not Required

☒ Interpreter Required

☐ Interpreter Booked

☐ Interpreter Cancelled

Language

Comments

Prefers a female.

Note: Changes will not be saved until the book or update button on main window is clicked!

**Save** **Cancel**

Please note: You **must** follow your SOP's for physically booking the interpreting services

## Adding Multiple Clients

If the appointment is shared with another Client, they can be added here. For adding Family Members, follow the Booking an Appointment for Family Member Clients.

- Click the **Add Client** button **Add Client** (bottom right)
- Search** for the additional Client
- Click **Add Client**

The additional Client is now visible in the booking screen

Client ID	Client	Relationship to Client	Referral & Waiting List	Transport	Interpreter Required	Comments
1052213	ADYA, Rahem'S (Mr)	Client	PARKINSON'S SPECIALIST NURSING SERVICE (Parki			
2001606	EL KHIRAQUI, Lincoln (Mr)	Client	PARKINSON'S SPECIALIST NURSING SERVICE (Parki			





## Additional HCP's Section

Additional HCPs

HCP Name	Client(s)
No HCP added.	

Search for HCP

Please Select

Add HCP

Remove HCP(s)

If no HCP is selected in the Appointment Details then the Additional HCP section will not be active.

Appointments can be edited and HCPs added as required at any stage until the appointment is Outcomed

If an HCP is selected in the Appointment Details then the Additional HCP section will be active allowing users to add additional HCPs to the appointment if required

- Select the **Additional HCPs** section
- Click the **Please Select** dropdown
- Select the **additional HCP's name** from the list of available staff
- Click **Add HCP** (right)

The additional HCP will be added to the appointment

## Intended Activities Section

Intended Activities

Client	Activities	HCP	Main?
EDWARDS, Courtney (Miss) (1000562)	Advice	ASTON, Deldre	<input type="checkbox"/>

Add Activities

Remove Activities

HCP(s)

☒ ASTON, Deldre

Client(s)

☒ EDWARDS, Courtney ...

Activities

☐ Photo Image Taken  
☐ Admission Assessment  
☐ Counselling  
☐ Health Promotion  
☐ Palliative - Symptom Control  
☐ Respiratory-Assessment  
☐ Catheter Care  
☐ Enuresis assessment

☐ Activities of Daily Living  
☐ Assessment  
☐ Carer Support/Training  
☐ Immunisation given  
☐ Review  
☐ Continence Advice  
☐ Pain Management  
☐ End of Life Care

☐ Advice  
☐ Bereavement Support  
☐ Dietary Advice  
☐ Joint Review with HCP  
☐ Treatment  
☐ Diabetic Care  
☐ Blood Pressure Management  
☐ Medication-Advice

☐ A&E Attendance  
☐ Health Education  
☐ Home Assessment  
☐ Medication - Administration Eye drops/Eardrops  
☐ Accident Prevention  
☐ Reassessment  
☐ Compression bandaging  
☐ Wound Care - Simple (Multiple)

This section allows the user to select the activity/ies they intend to do at the appointment, at the time of booking. However, activities can also be recorded when Outcoming the appointment.

- Select the **Intended Activities** Section
- Click to select the **required Activity/ies** ☒
- Click the **Add** button (above on the right)

Once the Add button is selected, the Selected Activities will display alongside Client's name under the section heading



## Repeat Appointments Section

This section allows the user to create repeat appointments, for example, if a Client is going to attend a series of exercise classes or a regular appointment as part of a course of treatment

Users do not need to complete this section unless repeat appointments are required

Repeat Appointments

☒ Allow Repeat Bookings
Appointment Type Follow-Up Appointmen

Frequency
☐ Daily
☒ Weekly
☐ Monthly
☐ Yearly

Recur every 1 week(s) on
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday

☒ End After 3 Total No. of Repetitions
☐ End By 9 Oct 2023

Client/HCP Name Group	Booking Date	Status
▲ EDWARDS, Courtney (Miss) (1000562) - 1000562	<input checked="" type="checkbox"/> 9 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 16 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 23 Oct 2023 13:00	
	<input checked="" type="checkbox"/> 30 Oct 2023 13:00	




- Place a **tick** in the ☒ **Allow Repeat Bookings** tick box
  - Appointment Type:** Select as required
  - Select the **Frequency** ☐ Depending on when the Client needs to be seen
  - Recur every:** Select the number of days/weeks/months etc. required and the required days of the week ☒ or day/repeat pattern for the months/years
  - ☒ **End After:** Select the total number of appointment repetitions
- Or
- ☐ **End By:** Select the date of the last appointment

The repeat appointments will display towards the bottom of the screen

Once you are happy with the information you have completed on the booking


- Click **Book**

If any of the appointments occur on a scheduled Bank Holiday (e.g. Christmas Day) a Booking Clash message will display. Select the Book Available option to only book appointments on the available dates

If the appointment has been booked with repeats, a repeat appointment icon will display on every appointment;  First appt,  Repeat appt,  Last appt



## Appointment Options

When you select the **grey Action**  button several different options will display:

### Open Appointment

Allows the user to make any changes to the appointment

### Cancel Appointment

Allows the user to cancel the appointment from the Clinic

### Record Outcome

The user completes the Outcome with the actions that took place at the appointment and this generates funding for the Service

### Case Record

Opens the Client's Record on the Clinical Portal – Client's View screen

### Client Diary

Open the Client's Record on the Client Diary screen

### Slot History

Displays any previous bookings in the appointment slot

### Client Arrived

Automatically records the current time as the arrival time on all Clinic Views and on the Outcome screen

### Enter Arrival Time

Displays the Enter Arrival Time screen for the user to enter the time

### Move Appointment

Displays the Move Appointment to Scratch Pad screen, a quick way to change an appointment

### Book Follow Up

Displays the Appointment Search screen for the user to find available appointments slots and book a follow up appointment for the same Client


Depending on the state of the slot, the available options will vary

Open Appointment  
Cancel Appointment  
Record Outcome  
Case Record  
Client Diary  
Slot History  
Client Arrived  
Enter Arrival Time  
Move Appointment  
Book Follow up



## Editing an Appointment

An appointment can be edited up until it has been Outcomed. If appointment information needs to be edited after Outcoming, the appointment Outcome will need to be Reversed by a Rio user with Reversal functionality rights (usually Administrators, Team Leaders, Managers). Alternatively, this can be done on request by the Service Support team.




- Click the **grey Action**  button
- Select **Open Appointment**

The Appointment screen displays with an Update button located at the bottom.

- Make the required changes.
- Click **Update**

## Arriving a Client (List View)

List View is the screen often used by receptionists to arrive Clients on Clinic. Once entered the colour of the appointment changes to a paler pink, to indicate the Client has arrived

<input type="checkbox"/>	Time	Client Name	Stream	Main HCP	Appointment Type	Arrival	Seen	End
<input type="checkbox"/>	08:00	EL KHI	2: Park	HCP, Bo (Mr)	First-F2F Consultation	12 : 48 	HH : MM 	HH : MM 

- Click into each of the **Arrival** fields
- Complete as required. Clicking the clock icon next to the Arrival field auto fills the arrival time with the current time or type in the required time.
- Click **Save**

## Printing a Clinic List (List View)

A paper copy of the Clinic List can also be printed in List View. The Print Clinic List button is located to the lower right of the List View screen

- Click **Print Clinic List**
- Complete as required
- Click **Go**

Please choose printing options below
×

☒ Print a single specified Stream

☐ Print all Streams, one Stream per page


☐ Print all Streams, ordered by time

Go Cancel



## Booking an Appointment for Family Member Clients

Some Services associate Clients together as 'Family Members'. If a Client is a Family Member you can easily add other Family Members to the appointment

- Click the **grey Action**  button
- Click **New Appointment**
- Search for the first Client you wish to book into the appointment


The **Appointment Booking (Clinic)** screen will display

Complete as required

- **Date:** Autofills (Mandatory)
- **Time:** Autofills (Mandatory)
- **Intended Duration:** Autofills (Mandatory)
- **Intended Consultation Medium:** Complete if required
- **HCP:** Leave Blank or select as required
- **Urgency:** Complete as required
- **Type:** Select required appointment type
- **Clinic:** Autofills (Mandatory)
- **Comments:** Add if required
- Click **Add Client** (bottom right)

If the Client has Family Members added to their Rio record, the Family Members screen will display, Family Members are listed in the Participant column

Locate the Family Member/s you want to include in the appointment

- Click  in the **Referred** column
- **Select** the **Referral** to your team

Family Members

Client Search

Client	Participant	Not Invited	Invited	Referred	Referral
EL KHI	ADDISON, Jan (Mrs) (1001000)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	TRAINING SERVICE TEAM

- Click **Add Client(s)** (bottom)
- Click **Book**


The Family Member is now added to the appointment

If the Clinic is displayed in **Stream View**, an appointment containing Multiple Clients will display as a **Group Booking**

- 



The Appointment Search functionality allows users to search for available or booked appointments in specific Clinics or with specific HCPs on specific dates or within a date range. Users can also book appointments from the Appointment Search screen.

- Today  Actions

Ad hoc

Appointment Search

Interactive Worksheet

- Select the required available/booked appointments; Clinic/HCP and Date and Time/Period

- ## What to Search

9 May 2023
Visual Indicators

☒ Available Appointments  
☐ Booked Appointments  
☐ Other Activity

### Where to Search

☐ Specialty   
 ☒ Clinic   
 ☐ HCP

Clinic(s) \* ☐ Select All

Select
 
  - ☐ MSK Classes - Moseley Hall Hospital
  - ☐ MSK Classes - Sutton Cottage Hospital
  - ☒ **MSK Classes NEW 2023**
  - ☐ MSK Classes NP BMRB Knee
  - ☐ MSK Classes NP HLC AFL
  - ☐ MSK Classes NP HLC AFL Women
  - ☐ MSK Classes NP MRH AFL
  - ☐ MSK Classes NP MRH Pilates

Clinic Stream HCP

All

Appointment Type

All

### What Dates to Search

☒ Date and Time   
 ☐ Period

Start Date \*

8 May 2023

End Date \*

12 May 2023

Time of Day

AM PM Clear

↑  
HH  
↓

↑  
MM  
↓


>

↓  
HH  
↑

↓  
MM  
↑

Duration

Any

- Click the **grey Action** 

- 



## Recording an Outcome (One Client)

- Click the **grey Action**  button
- Click **Record Outcome**

If the HCP was not selected when the appointment was booked, the HCP Selection screen will display

- Select the **HCP** name
- Click **Yes**

The **Appointment Outcome** screen will display with multiple sections to complete

## Appointment Details

The Clinic ID, date, time, intended duration and HCP display at the top of screen

## Client(s)

This section will display the **Client, Specialty and Details**

## Attendance Information

- **Arrival Time:** Complete with Client arrival time, if not already completed
- **Seen Time:** Complete with the appointment start time
- **Actual Duration:** Amend length of appointment, if required, in minutes
- **Who Else Was Seen?:** Not used currently at BCHC
- **Actual Consultation Medium:** Autofills if added to Book Appt screen, complete as required
- **Follow-Up** Not used currently at BCHC
- **Conclusion:** Complete as required
- **Reasonable Adjustment Made Indicator:** Not used currently at BCHC
- **Attendance Comment:** Complete if necessary

## Recording Progress Notes during the Appointment Outcome

A Progress Note can be recorded when Outcoming the appointment. The Note may be completed and 'Validated' or be partially completed and saved with a Validation Status of 'Unvalidated' allowing the Note to be completed later via the Clinical Portal



## Progress Note

Originator

TEST, Admin

Note Type

Administrative/Clerical

**B I U** [List Icon] [Link Icon] [Cut Icon] [Copy Icon] [Paste Icon]

This is a test Progress Note

Validation Status



Unvalidated

This Note contains third party information



This is a significant event

## Activities

If Intended Activities were added at the time of booking, these will show on the Activities Section. The HCP will be required to actualise the Activity and identify the Main Activity carried out at the appointment by selecting the Actual and Main Activity radio buttons ☉

▼ Activities

Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
SALLOUT, Aleison (Miss)	Advice	Please Select	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Activity

- Activities of Daily Living
- Advice
- Ax - Screening
- Blood Pressure Management
- Catheter Care

Ctrl + click to select multiple.

HCP

RAHMAN, Wahidur

Any additional Activities can be added from the Activity list

## Adding Additional Activities

- Select the required **Activity** from the list
- Click the **green plus**

If the new added Activity is the Main Activity, then the Main Activity ☉ needs to be changed to reflect this

▼ Activities

Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
SALLOUT, Aleison (Miss)	Advice	Please Select	minute(s)	No	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SALLOUT, Aleison (Miss)	Treatment	RAHMAN, Wahidur	minutes	Yes	<input checked="" type="radio"/>	N/A	<input checked="" type="radio"/>	<input type="radio"/>

Activity

- Activities of Daily Living
- Advice
- Ax - Screening
- Blood Pressure Management
- Catheter Care

Ctrl + click to select multiple.

HCP

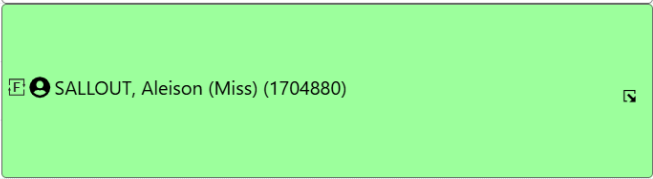


RAHMAN, Wahidur

- Click **Save**
- Click **Close** icon (top right) or Close Outcome (at the bottom)







The appointment is now green indicating that it has been Outcomed

09:00		
09:10		
09:20		   <b>SALLOUT, Aleison (Miss) (1704880)</b>

## Recording Outcomes (Multiple Clients)

- In Streams View
- Click the **grey Action**  button
- Click the **grey Action**  button for 1 of the Clients
- Click **Record Outcome**


If the HCP was not selected when the appointment was booked, the HCP Selection screen will display

- Select the **HCP** name
- Click **Yes**


The **Attendance Indicator** screen displays with a list of the booked Clients. Each Client has a tick box (far right)

If the outcome is the same for all clients in the booking i.e. They all attended and had same activities carried out:

- Click **Check All** ☒ tick box

Clients	Specialty	Details	<input checked="" type="checkbox"/> Check All
ADRA, Ray (Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>
 EL KHI Lin(Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>

If different Outcomes need to be recorded for each Client. Select the tick box for each individual Client and Outcome separately

Clients	Specialty	Details	<input type="checkbox"/> Check All
ADRA, Ray (Mr)	TRAINING SERVICE TEAM	No	<input type="checkbox"/>
 EL KHI Lin(Mr)	TRAINING SERVICE TEAM	No	<input checked="" type="checkbox"/>


Complete the Attendance Information and Activities sections. See the Client(s)

This section will display the **Client**, **Specialty** and **Details**

Attendance Information and Activities sections



## Recording Activities (Two HCPs)

- Click the **grey Action**  button
- Click **Record Outcome**

The **Appointment Outcome** screen displays multiple sections that will need completing.

### Appointment Details

Displays the appointment booking information

### Client(s)

Displays the Clients, Specialty, Details.


### Attendance Information

- **Arrival Time:** Complete with Client arrival time
- **Seen Time:** Complete the appointment start time
- **Actual Duration:** Amend length of appointment, if required, in minutes
- **Who Else Was Seen?:** Not used currently at BCHC
- **Actual Consultation Medium:** Complete as required
- **Follow Up:** Not used currently at BCHC
- **Conclusion:** Complete as required
- **Reasonable Adjustments Made Indicator:** Not used currently at BCHC
- **Attendance Comment:** Complete if necessary
- Record a **Progress Note** if required. See the Recording Progress Notes during the Appointment Outcome section

### Activities

Any Intended Activities which were added when the appointment was booked are displayed

Activities can also be selected from the Activity list

- Select the **Activity**
- Select the **HCP** who carried out the Activity
- Click **green Plus** 

# Clinic Appointments



Client	Activities	HCP	Actual Duration	Actual	Actual	Intended	Main Activity	Delete
EL KHI, Lin (Mr)	Advice	HCP, Bo (Mr)	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EL KHI, Lin (Mr)	Assessment	HCP, Bo (Mr)	minute(s)	No	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>


Activity

- Medication-MBC Monitoring
- Medication-Prescription
- Medication-Review
- Medication-Syringe Driver
- Mental Health Wellbeing
- Multidisciplinary Medicine

HCP

HCP, Ann (Ms)

Ctrl + click to select multiple.

- Click **Actual** ☒ and **Main** ☒ (as required)
- Click **Save**
- Click **Close**  icon (top right)

## Error Message – Outcoming an Appointment

When you are outcoming an Appointment and have completed all the necessary information, as you save the outcome you may get a prompt.

**Information**


One or more Clients in this series of appointments has already had a 'First Appointment' outcomed.  
You cannot save this outcome until the appointment type has been changed, or the outcome of the other First Appointment(s) in the series has been reversed.

This is because the appointment was booked as a First Appointment, but Rio knows, this is a Follow-Up Appointment.

## Changing the Appointment Type

- Click **Close Outcome**
- Click **Time**

08:00 - 08:30



**WALKER, Ethan (Mr)** | [To Outcome](#)

**Consultation**

**Medium**

Face to Face with Client

First Appointment @ Patient's Home



Appointment displays on the screen for you to change the appointment type


- **Type** FU-F2F Consultation
- Click **Update**

Now repeat the outcome steps and the prompt will no longer display

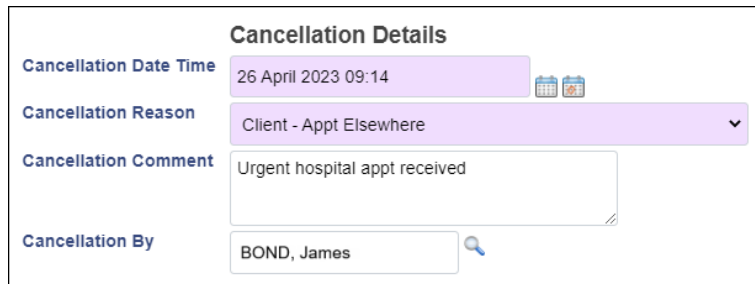


## Cancelling an Appointment

Appointments may be cancelled by the Service or by the Client

- Locate the appointment which needs to be cancelled
- Click the **grey Action**  button
- Click **Cancel Appointment**

The **Cancel Appointment(s)** screen displays, complete the cancellation details



Cancellation Details	
Cancellation Date Time	26 April 2023 09:14
Cancellation Reason	Client - Appt Elsewhere
Cancellation Comment	Urgent hospital appt received
Cancellation By	BOND, James

- **Cancellation Date Time:** Amend if required e.g. Date/ time Client notified
- **Cancellation Reason:** Select as required
- **Cancellation Comment:** Complete if required
- **Cancellation By:** Autofills
- Click **Cancel This Appointment**

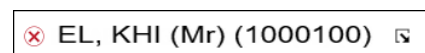
An Information prompt displays, asking '**Are you sure you want to continue to cancel**'?

- Click **Yes**

An Information prompt displays, asking '**Do you want to re-book this appointment**'?

- Click **No**

The cancelled appointment displays with the Client's name and the Cancellation icon in Stream View



Another Client can be booked into this appointment slot if required



## Recording a DNA (Did Not Attend)

If a Client fails to attend their appointment, it is Outcomed as a DNA (Did Not Attend)

- Click the **grey Action**  button
- Click **Record Outcome**

The **Appointment Outcome** screen will display

## Appointment Details

Details the appointment booking information

## Client(s)

Details the clients the appointment is booked for. If multiple Clients select the Client that DNA'd.

## Attendance Information

- **Arrival Time:** Leave blank
- **Seen Time:** Leave blank
- **Actual Duration:** Autofills
- **Who Else Was Seen?:** Not used currently at BCHC
- **Actual Consultation Medium:** Autofills if completed at time of booking.
- **Follow-Up:** Not used currently at BCHC
- **Conclusion:** **Did Not Attend**
- **Reasonable Adjustment Made Indicator:** Not used currently at BCHC
- **Attendance Comment:** Complete if required e.g. Admin to call Client to discuss
- Click **Save**

An Information Prompt displays, asking '**Do you want to book a follow-up appointment?**'

- Click **No**
- Click **Close**  icon (top right)

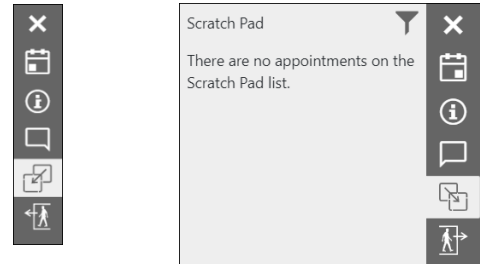
The Outcomed appointment displays in grey



## Rescheduling a Clinic Appointment

If an appointment needs to be moved to an alternative date, time or Clinic this can be done easily via the Appointment Scratch Pad. The Appointment Scratch Pad belongs to the team not to an individual. Any appointments moved onto the Scratch Pad must be immediately moved to the new appointment slot

The Appointment Scratch Pad is usually collapsed on the Clinic screen and will need to be displayed before starting to reschedule the appointment



- Click the **Scratch Pad** icon (left) to open the Appointment Scratch Pad

The appointment can now be 'dragged and dropped' into the Scratch Pad

- Click the **appointment**
- Holding the mouse button down, **drag** the appointment to the **Scratch Pad**
- Release** the mouse button

The **Move Appointment to Scratch Pad** dialogue box will display

- Reschedule Reason:** Select as required
- Reschedule Comment:** Complete as required
- Click **Move Appointment to Scratch Pad**

A Message Prompt displays, advising 'Appointment(s) successfully rescheduled!'

- Click **OK**

The Client's appointment will now display in the Scratch Pad

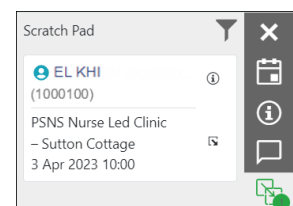
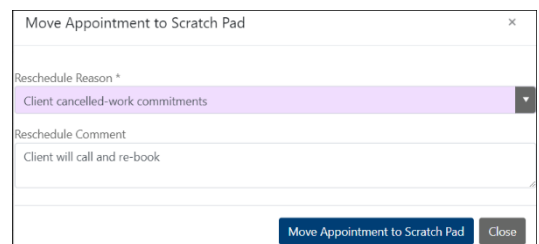
The icon will change to green and display the number of appointments waiting

- Locate the **new appointment slot**
- Click and Drag** the appointment from the Scratch Pad to the new slot

A Message Prompt displays, advising '1 Appointment successfully rescheduled!'

- Click **OK**


The appointment displays with the **Reschedule** icon





## Booking Other Activities

The **New Activity** function allows user to record Activities such as meetings, training events etc., where Client details don't need to be captured

- Click the **grey Action**  button
  - Click **New Activity**
  - **Start Date:** Autofills
  - **Time:** Autofills, amend if required
  - **Duration:** Autofills, amend if required
  - **Activity Type:** Select as required
  - **Comments:** Complete if required
  - **Streams Tab:** Autofills ☒
  - **HCP's Invited Tab:** Normally blank
  - **Repeat Activities Tab:** Complete if required
    - Place a **tick** in the ☒ **Allow Repeat Bookings** tick box
    - **Activity Type:** Select as required
    - Select the **Frequency** ☐ Depending on when the Activity occurs
    - **Recur every:** Select the number of days/weeks/months etc. required and the required days of the week ☒ or day/repeat pattern for the months/years
    - ☐ **End After:** Select the total number of Activity repetitions
- Or
- ☐ **End By:** Select the date of the last Activity
  - Click **Book**

The **Activity/Event** displays in green

Meeting- MDT





## Reversing an Outcomed Appointment






Once an appointment has been Outcomed it cannot be amended. If errors have been made (wrong HCP/time/activities etc.), then the appointment Outcome will need to be 'Reversed'

The Service Support team can Reverse Outcomed appointments on your behalf. Some BCHC staff, usually administrators, will have Reverse Outcome functionality on their Rio Access

As the name of the HCP doesn't display on the Reverse Outcome screen, always check the HCP details via the Client Diary before Reversing an appointments

- Click **MENU**
- Click  Reverse Functions
- Click **Reverse AMS Outcome**

The **Reverse Outcome** screen will display

Client	<input type="text"/>		Start Date	<input type="text"/>		End Date	<input type="text"/>			
Clinic	Stream	Date	Time	Duration	Seen Time	Seen Duration	Outcome			

- **Client:** Click 






The **Select Client for Reverse Outcome (Search)** screen will display

- **Search** for Client

The Client's name will now display

- **Start Date:** Complete as required e.g. Date of appointment to be Reversed
- **End Date:** Complete as required e.g. Date of appointment to be Reversed or date range
- Click **Go**

A list of Outcomed appointments within the date range for the Client will display

Client	<input type="text" value="EI KHI"/>		Start Date	<input type="text" value="4 April 2023"/>		End Date	<input type="text" value="28 April 2023"/>			
Clinic	Stream	Date	Time	Duration	Seen Time	Seen Duration	Outcome			
PSNS Nurse Led Clinic – Sutton Cottage	2	24 Apr 2023	09:00	60	09:00	50	Attended, FU (F2F) – 1 Week	<input checked="" type="checkbox"/>		

- Click ☒ to select the appointment(s) you wish to Reverse
- Click **Reverse Outcome** (bottom)

The appointment is now removed from the list and can be Outcomed correctly via the Clinic Appointments screen or Client Diary