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Overview

It is very important that Client's Telephone numbers and Email Addresses are accurate and up to date. The information is recorded on the **Demographic Details** screen using the **Communications** hyperlink.

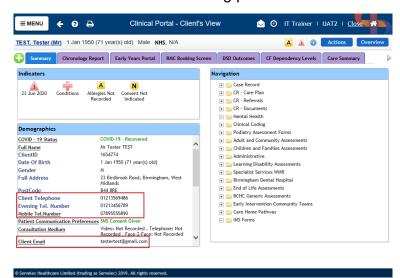
Viewing Telephone Numbers and Email Addresses

Client telephone numbers and email addresses can be viewed in the following places in Rio:

Via the Demographics pane of the Clinical Portal.

By hovering over the Client's name on the Banner bar.





By clicking the **Client Personal Information** icon. This icon is visible on various screens including **Clinic List View** and **Diary**, next to the **Clients Name**.



And also, on the **Demographic Details** screen.





Recording Telephone Numbers

Client Telephone Number

- Search for Client
- Access Demographic Details screen
- Click **Communications** (bottom of the screen)
- Click Edit this client (bottom of the screen)
- Click Add New Telecom (bottom of the screen)
- Click Method Select Telephone number
- Click Context Select Office Address
- Click Contact Details Type Number (no spaces)
- Click Valid From Enter Start Date
- Click Save to local and national

An Information window will display informing you Saving changes will update the Spine. Continue with save?



• Click Yes

The 'Office Address' will display as a Daytime phone number in the demographics tool tip which displays when you hover over the Clients Name on the Banner bar in the Clinical Portal.





Evening Telephone Number

- Click Menu
- Click Quick menu
- Click Demographic Details
- Search for Client

The **Demographic Details** screen will display.

- Click <u>Communications</u> (bottom of the screen)
- Click Edit this client (bottom of the screen)
- Click Add New Telecom
- Click Method Select Telephone number
- Click Context Select Primary home (after business hours)
- Click Contact Details Type Number (no spaces)
- Click Valid From Enter Start Date
- Click Save to local and national

An Information window will display informing you Saving changes will update the Spine. Continue with save?



• Click Yes

The **Evening** telephone number doesn't display in the demographics tool tip which displays when you hover over the Clients Name on the Banner bar in the Clinical Portal.





Mobile Telephone Number

- Search for Client
- Access Demographic Details screen
- Click **Communications** (located at the bottom of the screen)
- Click Edit this client
- Click Add New Telecom
- Click Method Select Telephone number
- Click Context Select Mobile device
- Click Contact Details Type Number (no spaces)
- Click Valid From Enter Start Date
- Click Save to local and national

The **Mobile phone number** displays in the demographics tool tip which displays when you hover over the Clients Name on the Banner bar in the Clinical Portal.

Adding an Email Address

- Search for Client
- Access Demographic Details screen
- Click **Communications** (located at the bottom of the screen)
- Click Edit this client
- Click Add New Telecom
- Click Method Select Email address
- Click Context Select Communication address at home
- Click Contact Details Type email address (no spaces)
- Click Valid From Enter Start Date
- Click Save to local and national

The **Email address** doesn't display in the demographics tool tip which displays when you hover over the Clients Name on the Banner bar in the Clinical Portal.





Ending Telephone Numbers and Email Addresses

- Search for Client
- Access Demographic Details screen
- Click <u>Communications</u> (located at the bottom of the screen)

Method	Context	Contact Details	Valid From	Valid To	
Telephone number	Communication address at home	01213545432	7 Mar 2006		Edit
Telephone number	Primary home (after business hours)	01213603545	1 May 1982		Edit

- Click Edit this Client
- Click **Edit** (on the number to be ended)
- Click Valid To Enter End Date
- Click Save to local and national



The number is no longer visible however you may still view it by checking the **Show Closed** tick box located on the bottom right of the screen.