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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?**

Information

Saving changes will update Spine. Continue with save?

Yes No

- 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.

WALKER, Ethan (Mr) 18 Apr 1993 (28 year(s) old)

Client:	WALKER, Ethan (Mr)
Address:	Flat 1, 2 Kenwood Road, Birmingham, West Midlands
Postcode:	B9 5UH
Daytime phone number:	01211234455



Evening Telephone Number

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

The **Demographic Details** screen will display.

- Click **Communications** (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?**

The screenshot shows a white rectangular dialog box with a thin border. At the top left, the word "Information" is written in a small, bold font. Below this, the text "Saving changes will update Spine. Continue with save?" is centered. At the bottom right of the dialog box, there are two blue buttons with white text: "Yes" and "No".

- 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 screenshot shows a form with the following fields:

- Method:** A dropdown menu with 'Email address' selected.
- Context:** A dropdown menu with 'Communication address at home' selected.
- Contact Details:** A text input field containing 'Test1@hotmail.com'.
- Valid From:** A date picker field showing '14 July 2021' with a close button (X) and calendar icons.
- Valid To:** An empty date picker field with calendar icons.

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 **Communications** (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**

 Show closed

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.