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Client Diary Overview

The Client Diary provides Rio users with a comprehensive overview of a Client's appointments. Users can view the full appointment details, Cancellations, Appointment Outcomes of an Appointment. They can also Filter appointments from the Client Diary screen.

Date & Time	Location	Team	HCP	Referral	Specialty	Activity	Outcome/Cancellation Reason	Other
9 Nov 2020 08:30	Clients Home	Birmingham Healthcare	ASTON, Deidre	15 Jul 2013 09:00	GENERAL MEDICINE	Assessment	Attended, Follow Up Appointment Required	[Icons]
10 Nov 2020 09:35	Clients Home	Birmingham Healthcare	ASTON, Deidre	15 Jul 2013 09:00	GENERAL MEDICINE	Advice	Attended, Follow Up Appointment Required	[Icons]
11 Nov 2020 09:00	Clients Home	Birmingham Healthcare	ASTON, Deidre	15 Jul 2013 09:00	GENERAL MEDICINE	Advice	Cancelled by provider-facilities not available	[Icons]
12 Nov 2020 08:00	Clients Home	Birmingham Healthcare	ASTON, Deidre	15 Jul 2013 09:00	GENERAL MEDICINE		Cancelled by provider-facilities not available	[Icons]
12 Nov 2020 13:00	BCHC Clinic 01, RIO Health Centre	Birmingham Healthcare	MISKIMMIN, Linda	15 Jul 2013 09:00	GENERAL MEDICINE		Client cancelled	[Icons]
13 Nov 2020 13:00	BCHC Clinic 01, RIO Health Centre	Birmingham Healthcare	MISKIMMIN, Linda	15 Jul 2013 09:00	GENERAL MEDICINE		Cancelled by provider-facilities not available	[Icons]
16 Nov	Clients	Birmingham	ASTON	15 Jul	GENERAL			[Icons]

Accessing the Client Diary via the Main Menu

- Click **Menu**
- Click **Appointments**
- Select **Client Diary**

The **Client Search** screen will display

- **Search** for your Client

The **Client Diary** for your Client will display



Accessing the Client Diary via the Clinical Portal

- Ensure you are displaying the **Summary** tab within the Client's Portal
- Locate the **Referrals** folder in the Navigation pane
- Click to open the **Referrals** folder
- Select **Client Diary**

The **Client Diary** for your Client will display

Filtering the Client Diary

To the left of the Client Diary screen is the **Appointment Filter**.

By default the **Start Date** is one month ago and the **End Date** is one month in the future; however you can search as far back or forward in time as required by entering the required date range.

By default All Appointments, is selected; however you can choose to view Cancelled, Non-Cancelled or Urgent Care Attendances.

The HCP dropdown will display a list of all the HCPs who have had an appointment with the Client. Selecting a name from the list will allow you to find appointments with that specific HCP.

The Referral dropdown will display a list of all the Referrals for a Client. Selecting a Referral from the list will allow you to find all the appointments recorded against that Referral.


- Select your required Filter
- Click the **Find** button

Client Diary Icons

- Displays next to the HCP name, hover over to view names of additional HCPs associated with this appointment
- Booked Appointment
- Outcomed Appointment, hover over to view attendance outcome information
- Cancelled Appointment, hover over to view cancellation information
- Rescheduled appointment, hover over to view reschedule information
- Appointment Activities, hover over to view all recorded/intended activities
- Appointment Comment, hover over to display comment added during the booking of this appointment



Client Diary Actions

The blue action button  found to the right of each Appointment allows users to perform tasks from the Client Diary screen. This options available depend on the status of that appointment.

Outcomed Appointment Actions

- Click the action button for an Outcomed appointment

You will see the **Appointment Details** option

- Click **Appointment Details**

The **Book HCP Appointment** screen will display

- Click the **Appointment History** tab (top left) to view the appointment history
- Click the **Close Booking** link (bottom of screen) to return to the Client Diary screen

Booked Appointment Actions

- Click the action button for a Booked appointment

You will see the following options:

- | | |
|-----------------------------|--|
| Record Outcome: | This option will only display if the appointment is booked for Today or in the past. Selecting this option will open the Attendance Indicator screen allowing you to Outcome the appointment |
| Appointment Details: | Opens the Book HCP Appointment screen allowing you to Edit the appointment |
| Cancel Appointment: | Opens the Cancel Appointment screen allowing you to Cancel the appointment |
| Move to Scratch Pad: | Allow you to Reschedule the appointment using the Appointment Scratch Pad |
| Transfer to HCP: | This option is not used at the Trust |