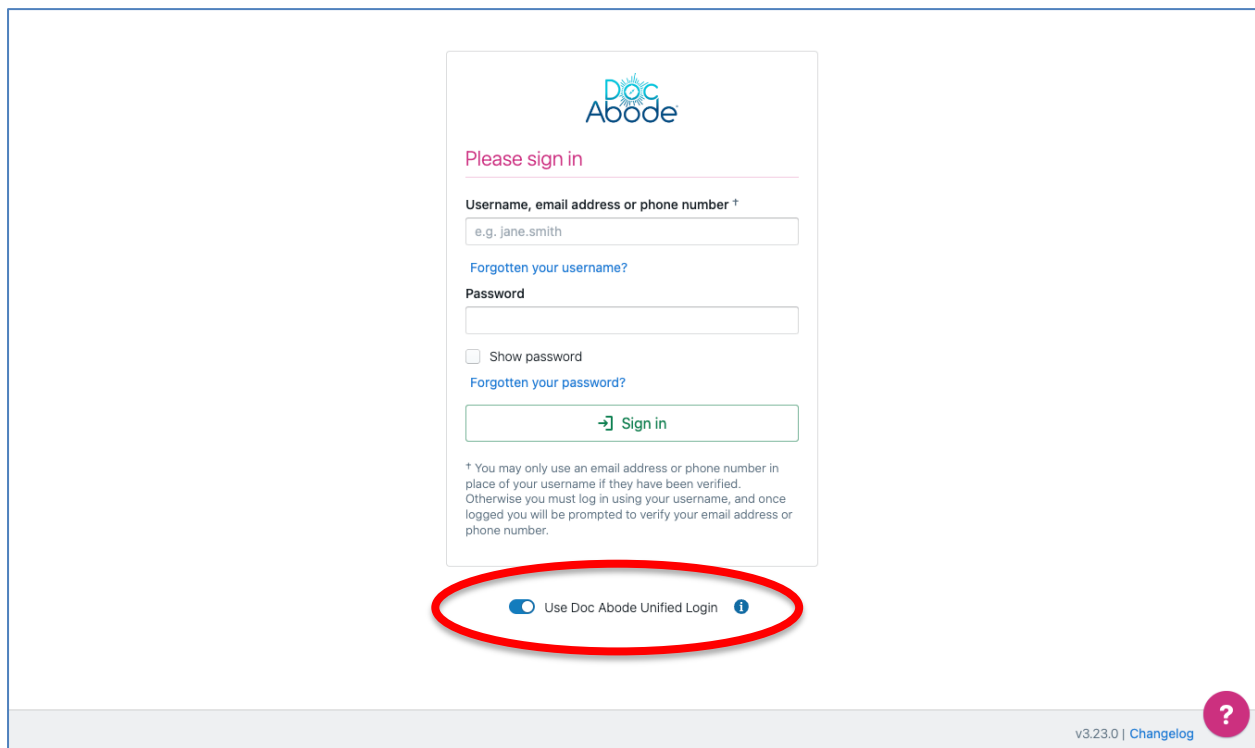# Scheduling System – Controller Functions

Orientation

This document describes how to log in to the Doc Abode system and the features of the webpage that is first presented to the Controller. The objective is to help Controllers to make the best use of the system.

Please note that the Controller application is best experienced on Edge and Chrome browsers.

1. Select https://controller.docabode.com/ to navigate to the login page shown below. Please enter the user credentials supplied by Doc Abode and then press the *Sign in* button.
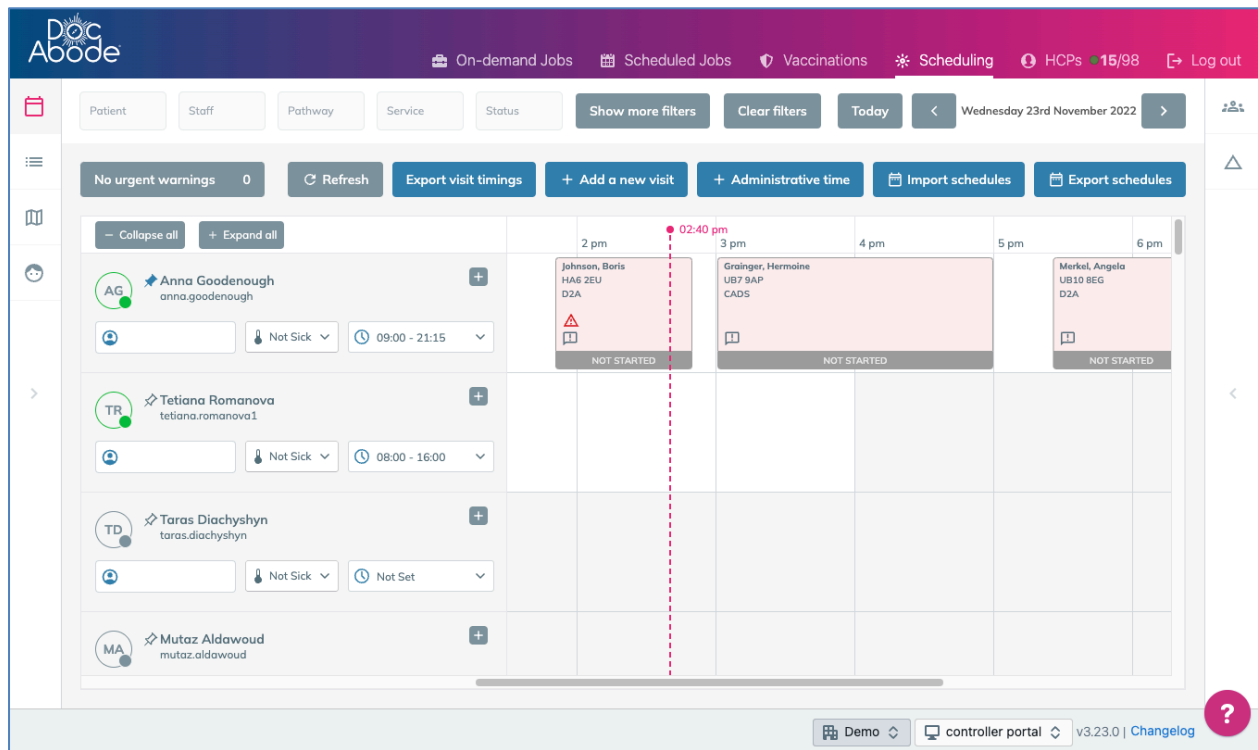
   Note the *Use Doc Abode Unified Login* button should be switched **on** as shown below
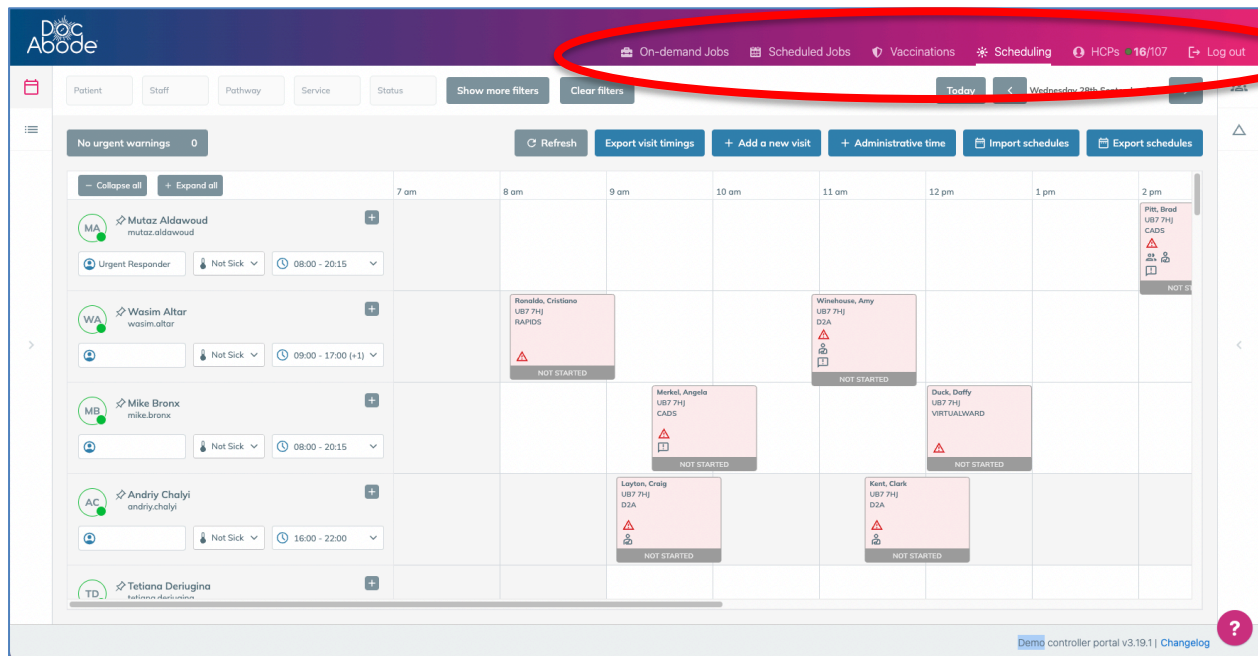

2. Then select the Scheduling tab
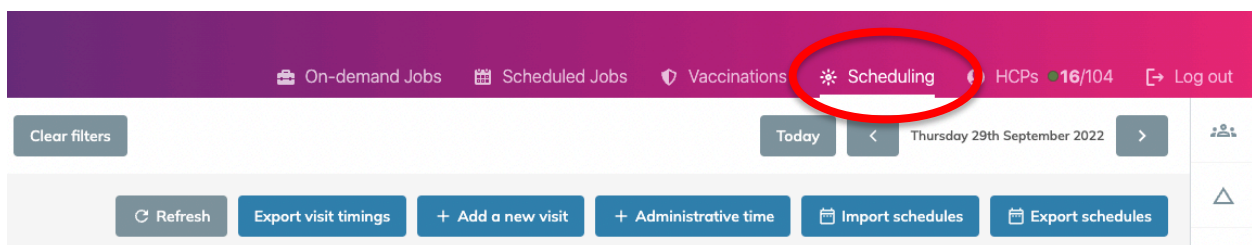
3. A webpage similar to the example below is displayed.

This document will work its way around the page to describe the main features presented to the controller.

Further user guides describe the use of each feature in more detail, please see the full list of user guide documents if further information is needed.

- **Menu Bar**

The top header will offer access to any modules the user has access to are presented. In the example above, the Controller has access to four modules provided by Doc Abode, which are the On-demand, Scheduled jobs and Vaccinations modules as well at the Scheduling system. These are not in scope for this document. Please contact Doc Abode you are interested in finding out more about these.

The Scheduling system is the module we are describing in this document.

To the right of HCPs we see a couple of numbers – in this example it is **16**/107. This shows how many HCPs (16) are receiving notifications and how many (107) are set up in the system. Finally, there is the option to log out.

- **Choosing the layout**
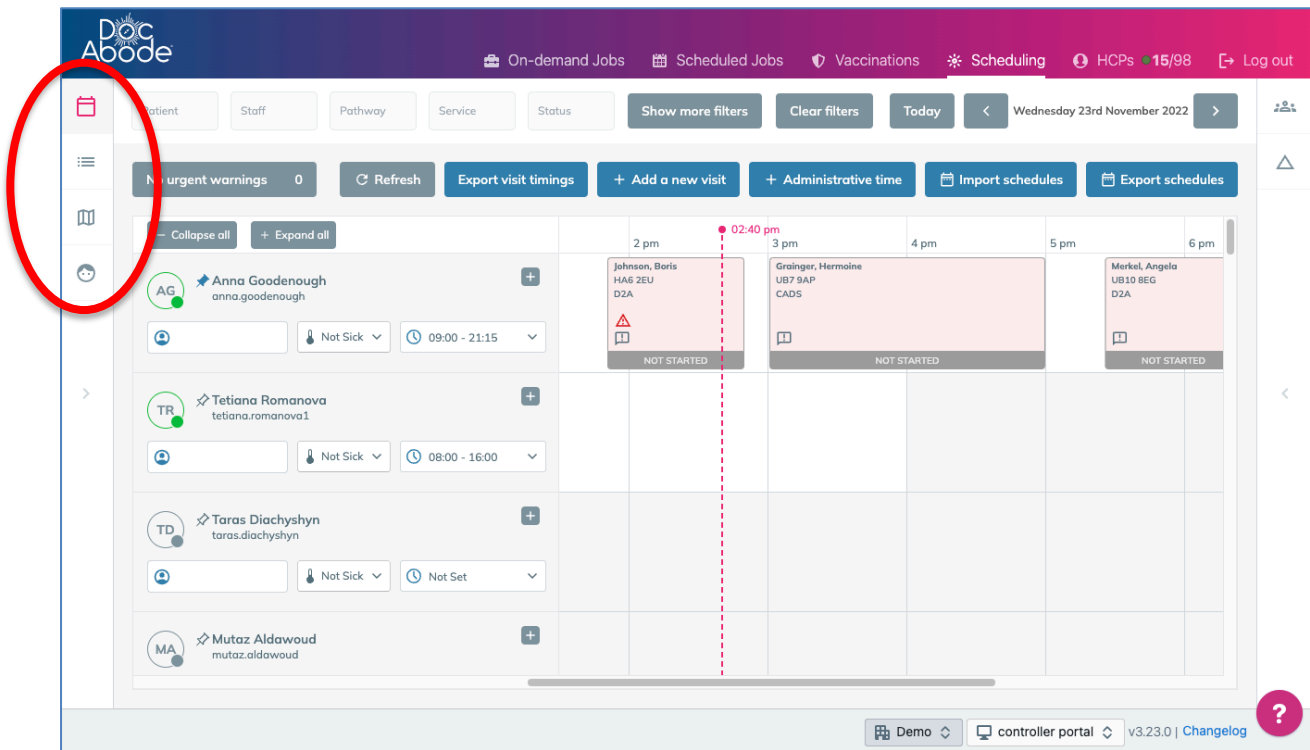
The default presentation of the main part of the page is a vertically orientated view of all HCPs, showing their planned visits, we call this the calendar (or grid) view. Each HCPs planned visits are shown horizontally as swim lanes. The calendar icon circled above is shown in red.

The band along the base of each tile is coloured to highlight the status of each visit. The colours are as follows

Status	Colour	Meaning
Not started	Grey	Visit not yet started
Current	Blue	HCP is on their way
Arrived	Pink	Care started
Completed	Green	Visit completed
Aborted by (COD/HCP)	Red	Visit cancelled

The next alternative view is the list view. Select the list view icon, circled below in red. The controller is presented with a list of visits, sorted alphabetically by patient surname, as shown below.

The next view is the map view

In the example shown a filter has been applied for the single HCP. All their visits are shown and the icons are all grey as none have started. The map size can be increased by pressing the circled arrow, as shown below.
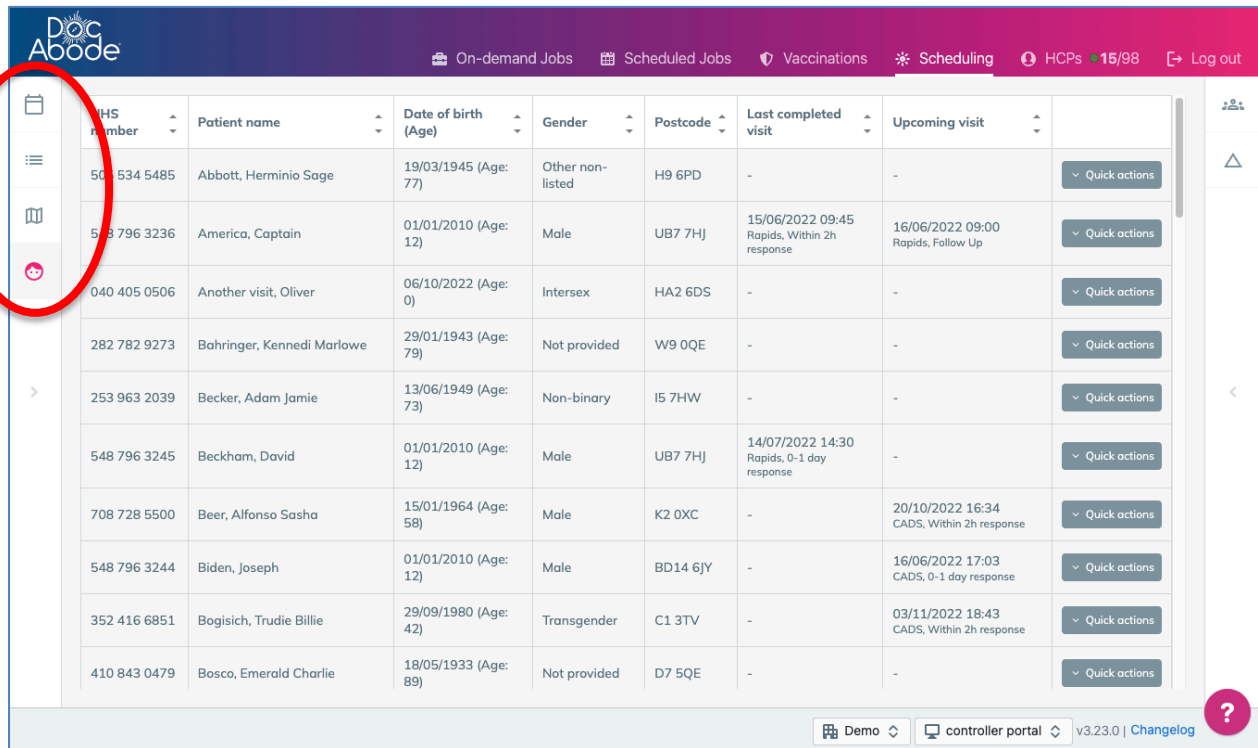
This HCP's four visits are shown on the map, which has been centered according to the data for the team. The pins will change colour in the same way as the visit tiles on the calendar view. This picture also shows some double-up pins to illustrate the independent colour changes.
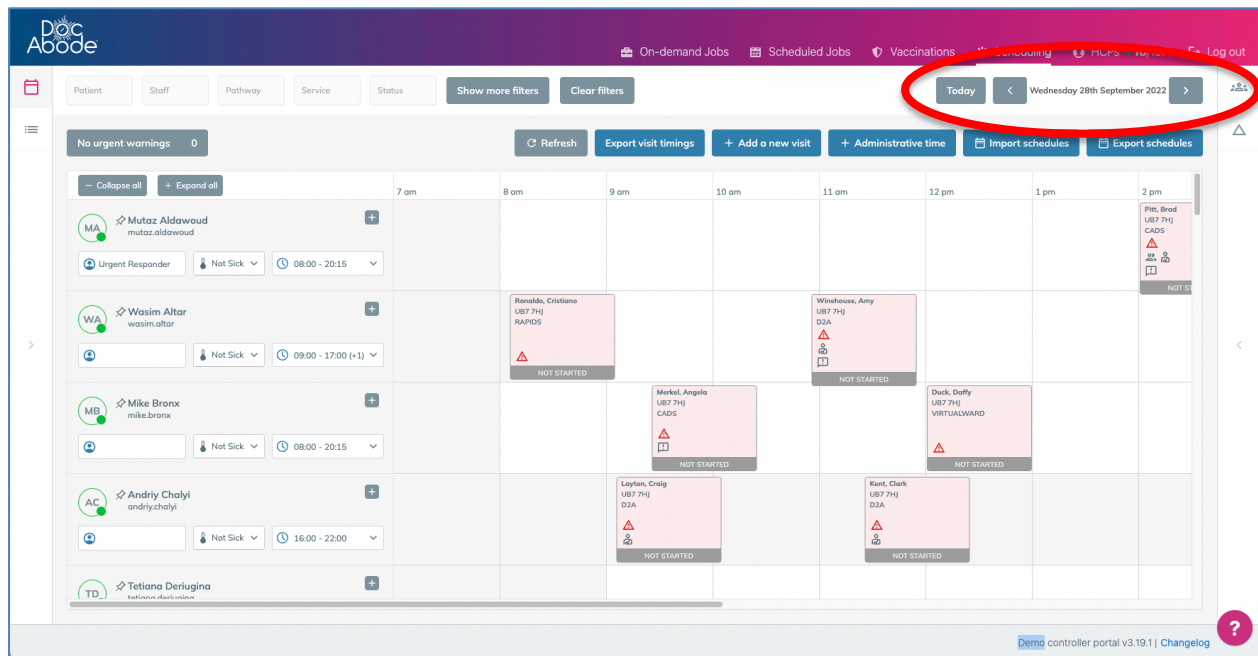
Finally, the controller can select the patient list view to see an alphabetical list of all the patients known to the Doc Abode system. The list can be sorted and filtered, and there are 'quick actions' to enable the addition of a visit or admin time to be added for the patient.
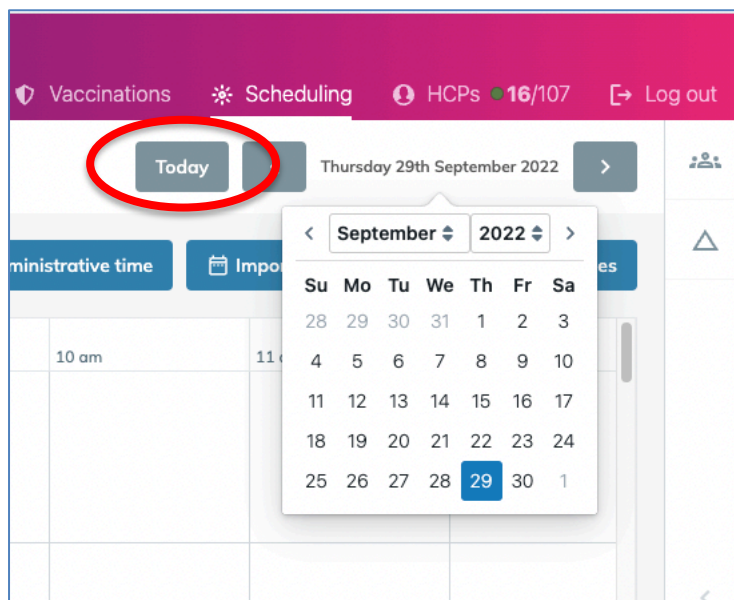
- **Date selection**

By default the date presented is today's date. It is possible to move forwards and backwards in time by using the arrows to the left and right of the date. Additionally, when the date itself is pressed a calendar will appear and the desired date can be selected from there.


For convenience, in order to go back to today's date, simply press the button marked *Today*, just to the left of the date.

- **Using filters**
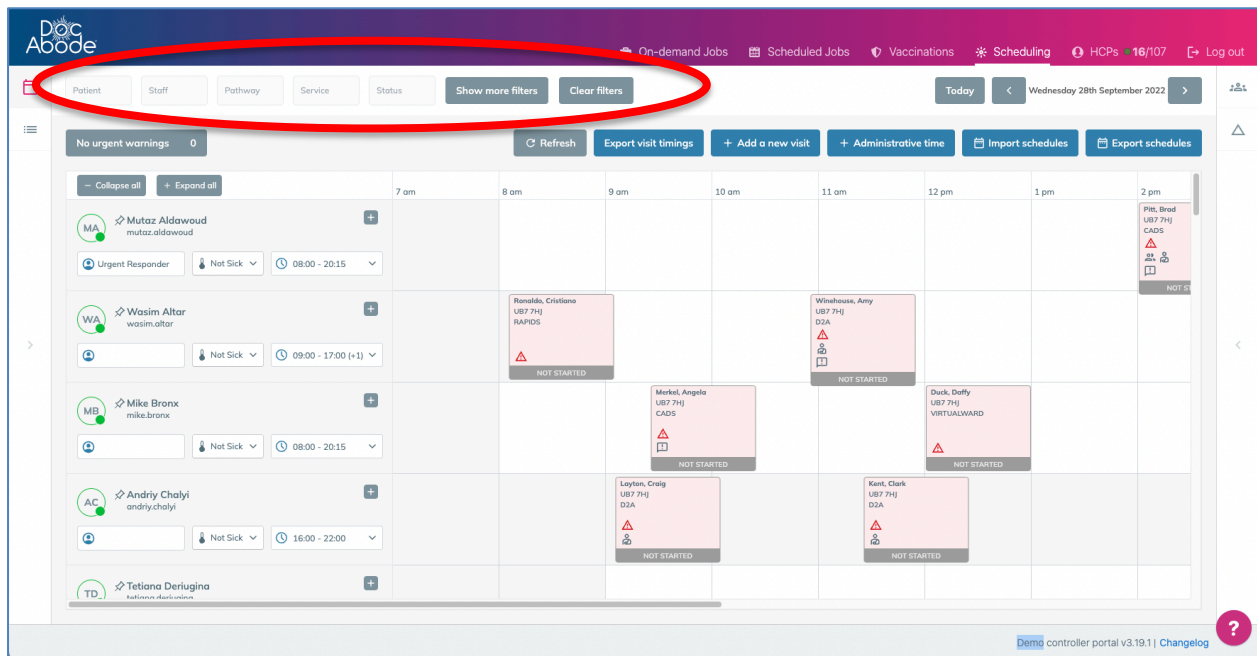
Filtering is a powerful capability within Doc Abode. This feature enables the controller to select only a desired subset of data to view. The most common filters are fixed on the webpage, the button *Show more filters* will display an additional set. The *Clear filters* button will reset to the Doc Abode default, which is no filtering at all and not displaying aborted visits.
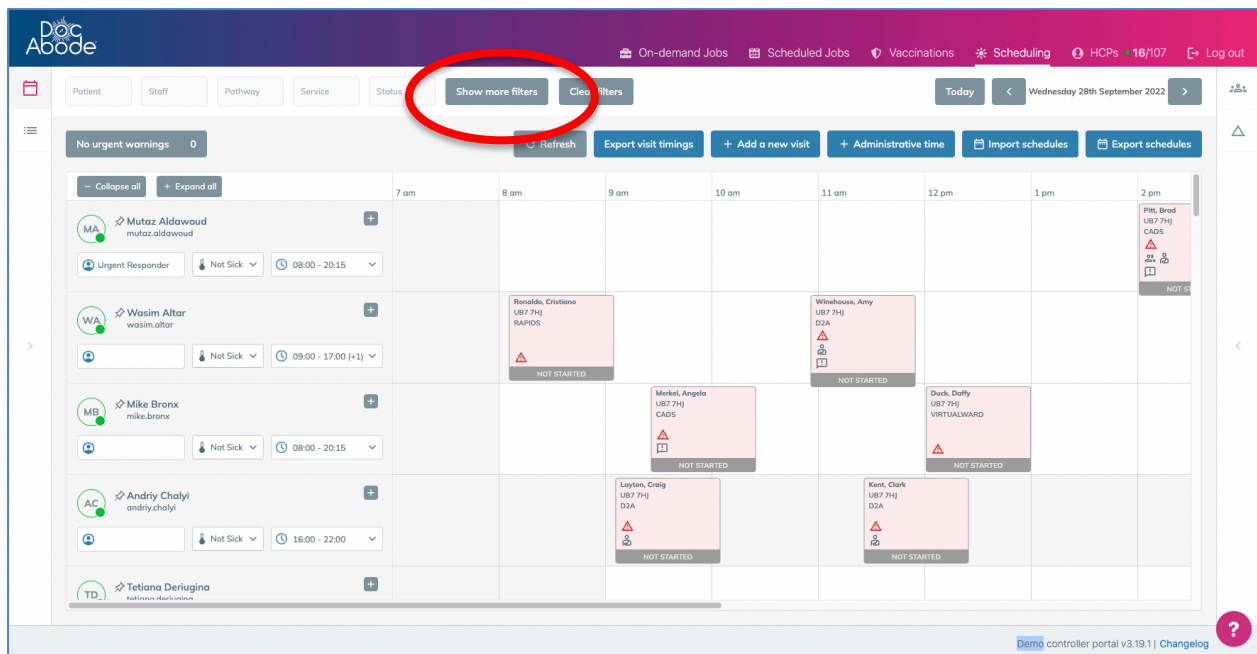
When the *Show more filters* button is pressed the following display is presented

By default the *Show aborted visit* checkbox is unticked. When this is ticked, all aborted visits will be displayed.

- **How to use the filters**

When the filter box does not contain arrows, this means the user can enter full or partial data. More than one entry can be made and they will be treated as an OR search. For example the list of patients we have presented in screenshots above includes Angela Merkel and Amy Winehouse. By entering *mer*, pressing the return button, then entering *hou*, and pressing the return button again the filter box and main page then looks like this. This will display only those patients that include the letters *mer* or *hou* in their names.

As soon as the x next to the filter is pressed to remove it, such as pressing the x against *mer*, the webpage will immediately be refreshed with the new filter applied.

In the example below, only the patient with *hou* somewhere in their name is displayed.

When the filter box contains arrows, this indicates there are multiple selections available, the user can select one entry from a drop-down list. This list always has *All* at the top, which is a quick way to remove an unwanted filter.

By default the *Show aborted visit* checkbox is unticked. When this is ticked, all aborted visits will be displayed. These are easily identifiable as they are presented with a red border and the status along the bottom of the tile will show either ABORTED BY HCP or ABORTED BY COD.
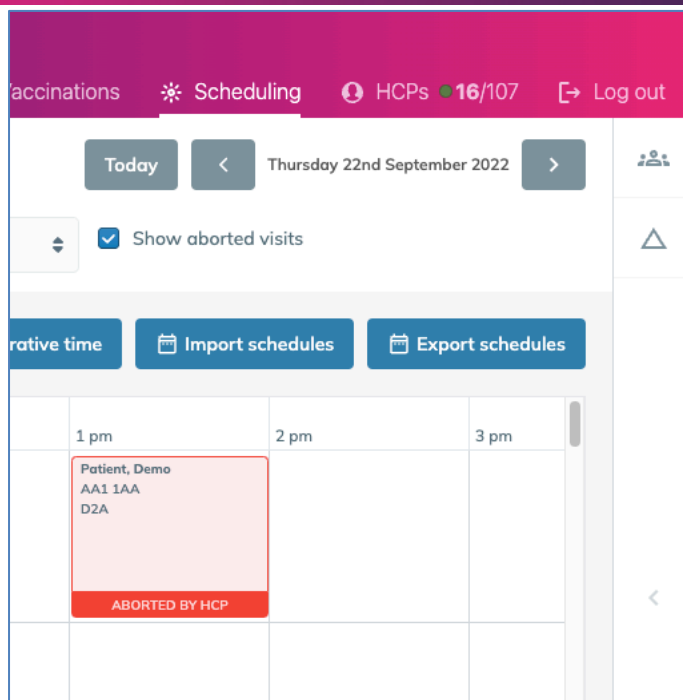
- **Warning panel**

The warning panel is usually grey as shown below to indicate there are no urgent warnings. When there are urgent warnings this will change to bright red and can't be missed!
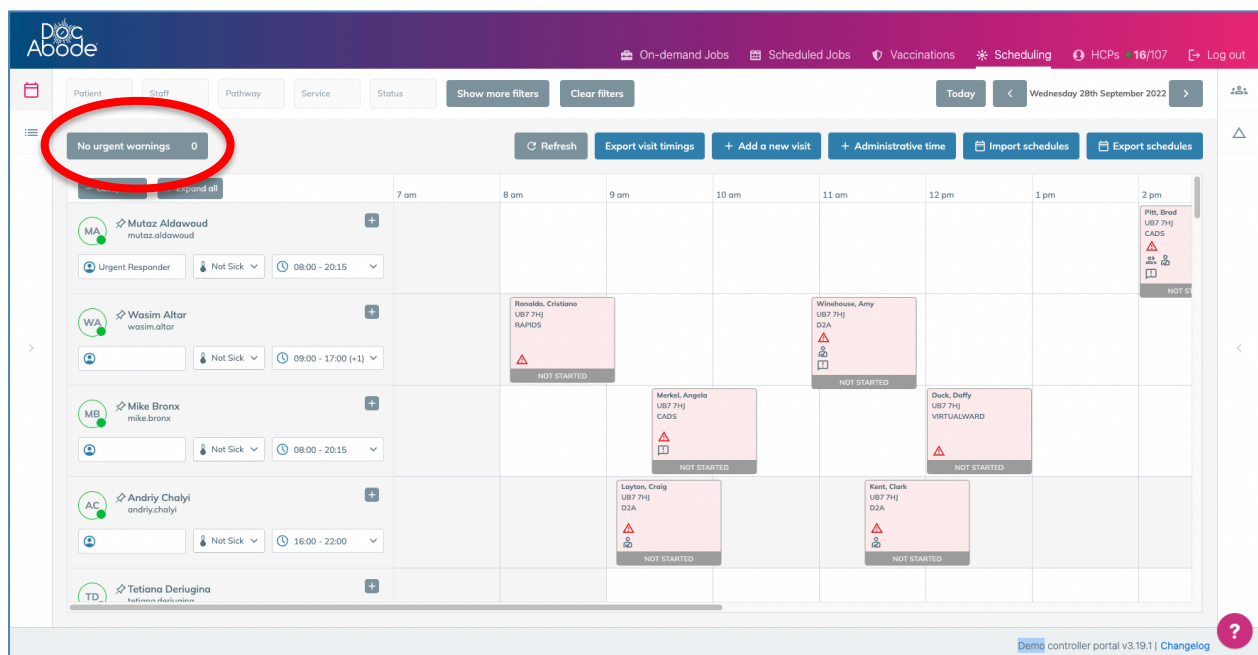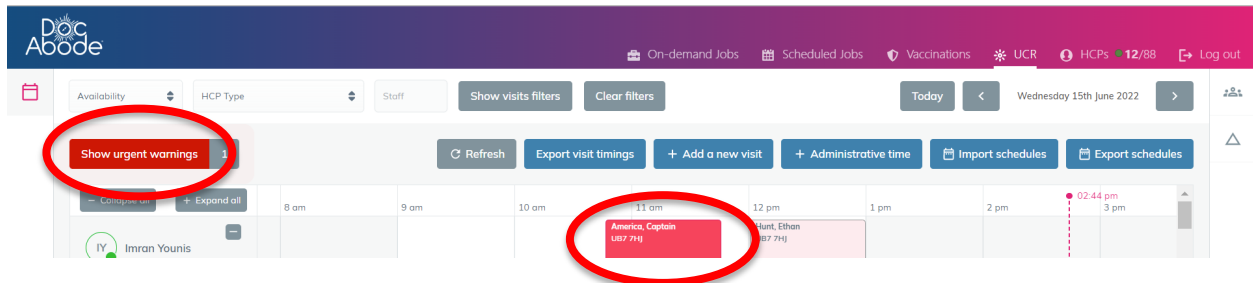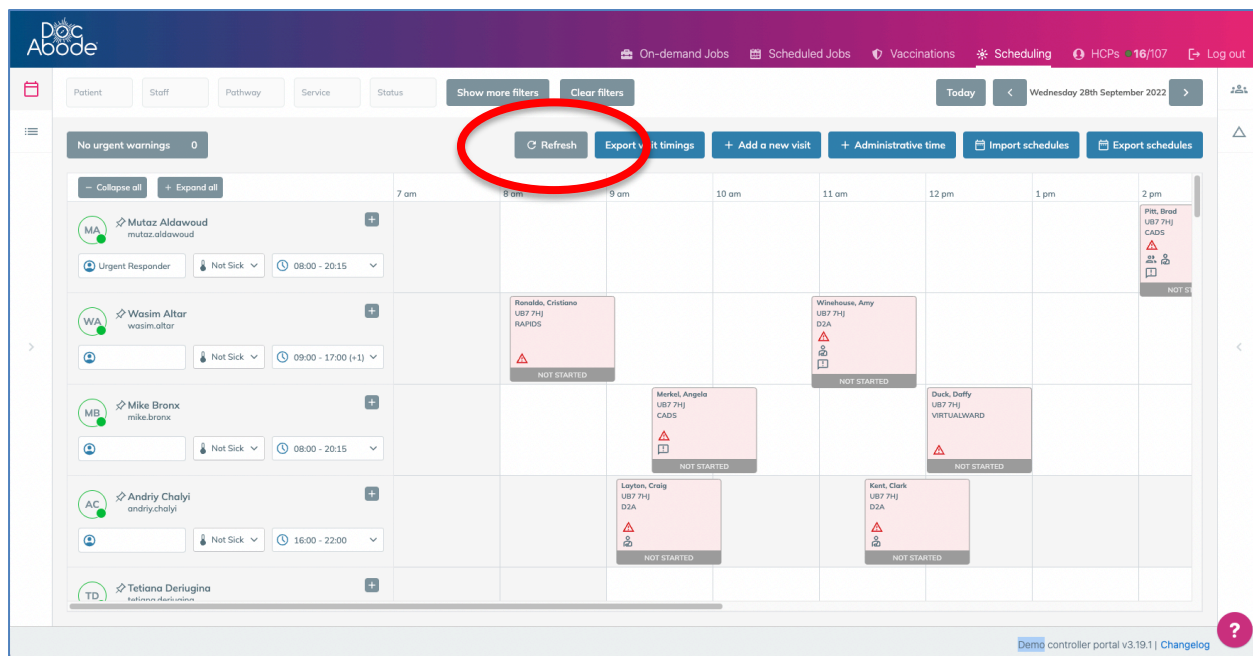
Please see separate guides for details on how to raise and resolve warnings.

- **Refresh button**

The Doc Abode system is refreshed every minute to show changes that have been applied, but users can refresh sooner of needed by clicking the *refresh* button. It may be useful at times, for example when visit timings have been changed but the dashboard has not updated.

Do use this whenever there is uncertainty around whether the data displayed is up to date.

Note similar functionality is available using the normal browser refresh capability, for example for Microsoft Edge this is Ctrl-F5. However, if the browser refresh option is selected then the context may be lost – for example if the controller is looking at a day that is not today, the refresh will set the page back to the default which is today, rather than preserving the state of the webpage as it was.

- **Pinning HCPs**
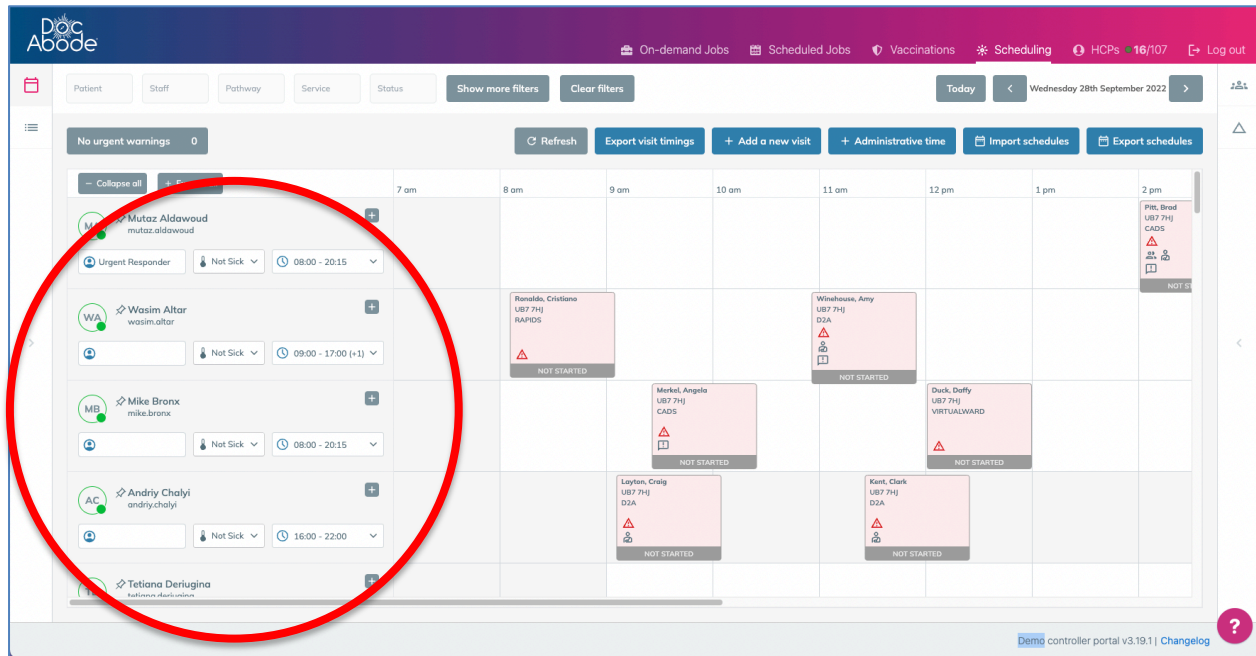
The calendar view is the one most commonly used. On the left there is a list of HCPs, who by default are presented in alphabetical order by surname, with available HCPs first then unavailable ones later.

It is possible to change this order by pinning HCPs. By pressing on the pin icon the HCP is pushed to the top of the list, and the pin icon is filled in in blue. An unlimited number of HCPs can be pinned. The HCPs that are pinned will be sorted in the order that the pins were made. Unpinning the HCP will revert to listing them in the default sequence.

Pins will remain in place until removed and are unique to each user. For HCPs that also have Controller access, we recommend they pin themselves to the top of the HCP list for convenience.

By pressing the plus (+) sign to the right of the HCP their details will be expanded to show the HCP's role and mobile phone number. Using the *Expand all* and *Collapse all* button will do the same for all HCPs in the list.
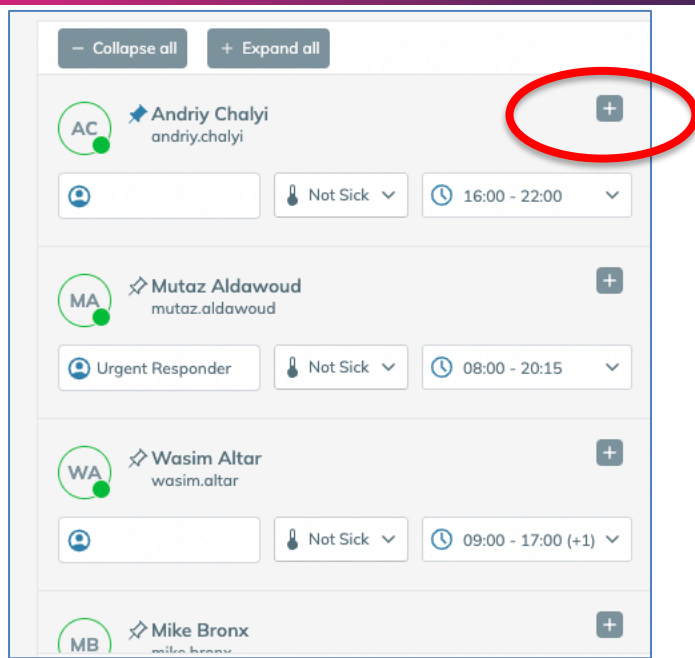
When an individual HCP has been expanded, press on the minus (-) button to collapse it again.
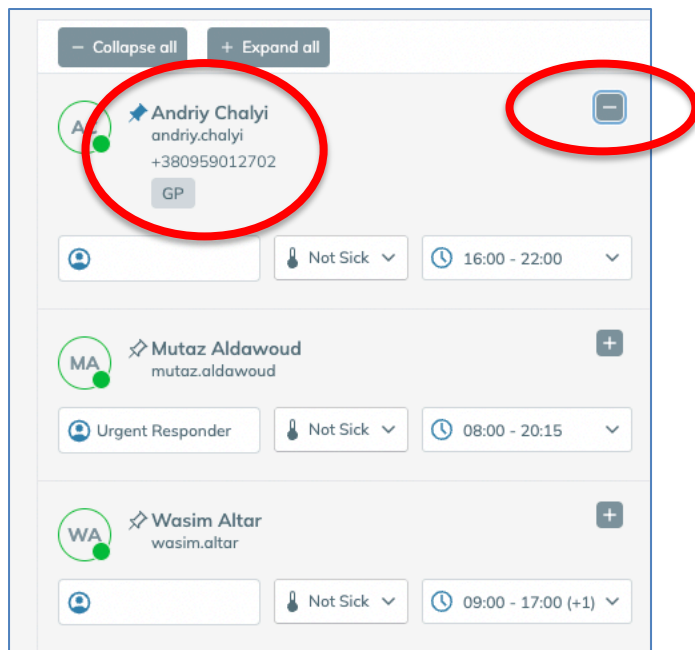
- **Assigning functions to HCPs**

The box under the HCP's name is used to denote any special role the person has on that day. The system enables this to be set to Coordinator and/or Urgent responder. If any further options are required please contact Doc Abode to discuss.

- **Marking HCP as sick**

The *Not sick* button can be changed to *Sick* by toggling, as an easy way of showing the team that an expected HCP is suddenly unavailable, for whatever reason. This state will remain for future days until changed back.
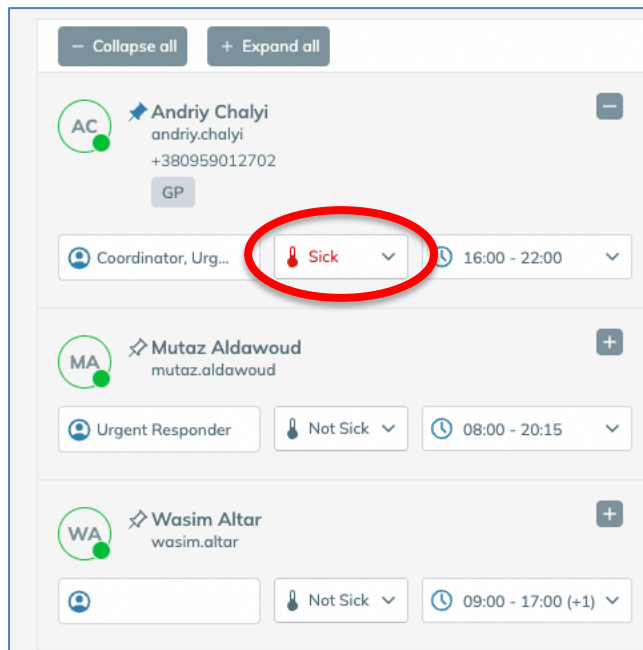
- • **Setting staff availability**

Finally, whilst we recommend setting up shifts in bulk using the Import schedules button (see separate guide), individual availability can be changed using the drop-down list to the right of the sickness entry.
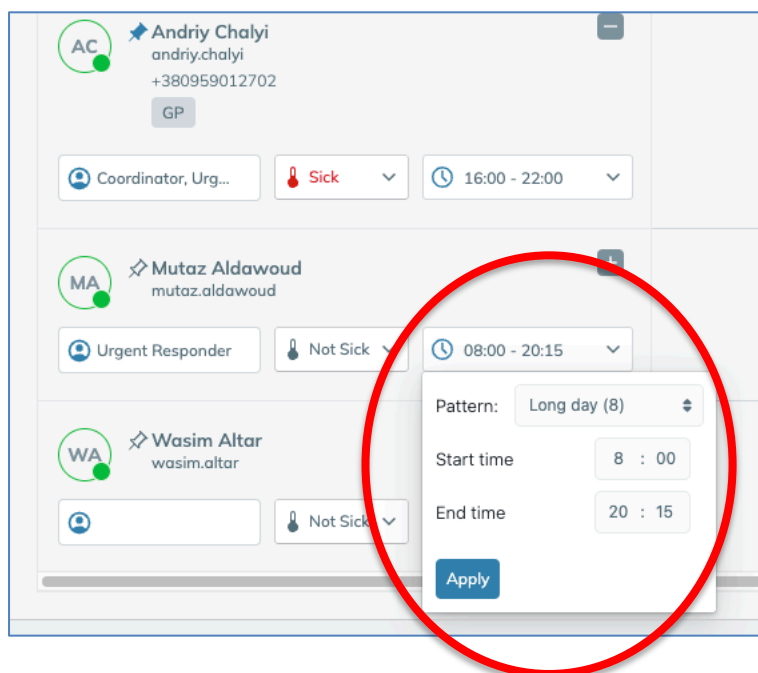
A drop-down list of options is presented for ease of entering common shift times. There is also a custom option which enables any time to be entered. The shift duration is changed by pressing the Apply button.

- **Viewing the legend**

The tiles in the centre of the calendar show visits, and for convenience a number of symbols are used to advise on a variety of circumstances. When the legend icon is pressed, the controller can see the list of possible symbols that could be presented and what these mean.
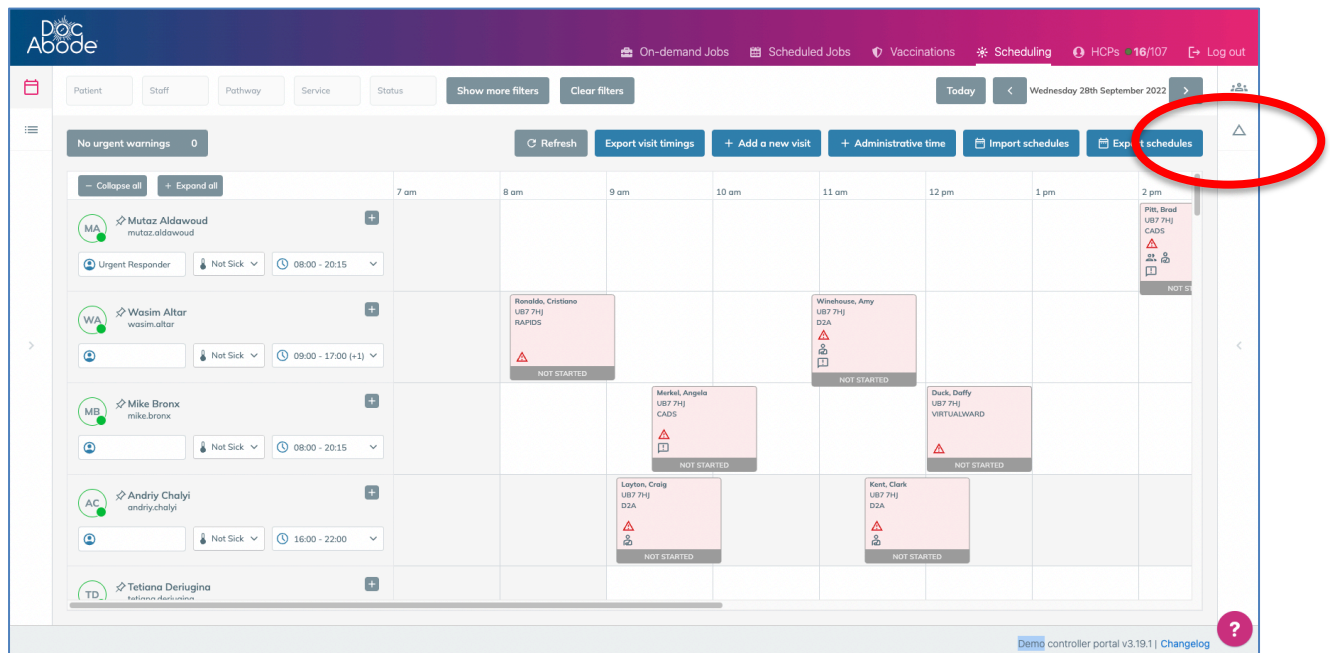
At the time of writing the list of legends extends to over one page and is shown below.

Legend ✕

Warning indicators
⚠ Visit has warnings
🕓 Earliest time of arrival set
🕓 Latest time of arrival set
👥 Double-up visit

Visits / admin blocks
☐ First time visit
☐ Follow-up visit
☐ Admin time
☐ Coordinator or urgent responder
☐ Meeting, training or other admin types
☐ Unresolved patient alert

Visit states
■ Visit not yet started
■ En-route to patient
■ Care started
■ Visit completed
■ Visit cancelled

Additional information
⚠ Visit has warnings
🕓 Earliest time of arrival set
🕓 Latest time of arrival set
👥 Double-up visit
🚗 Visit requires a car
📋 Pre-visit notes set
🗣 Patient a non-English speaker
👶 Complex case
📞 Callback requested

Demo controller portal v3.19.1 | Changelog

- **Viewing unassigned visits**
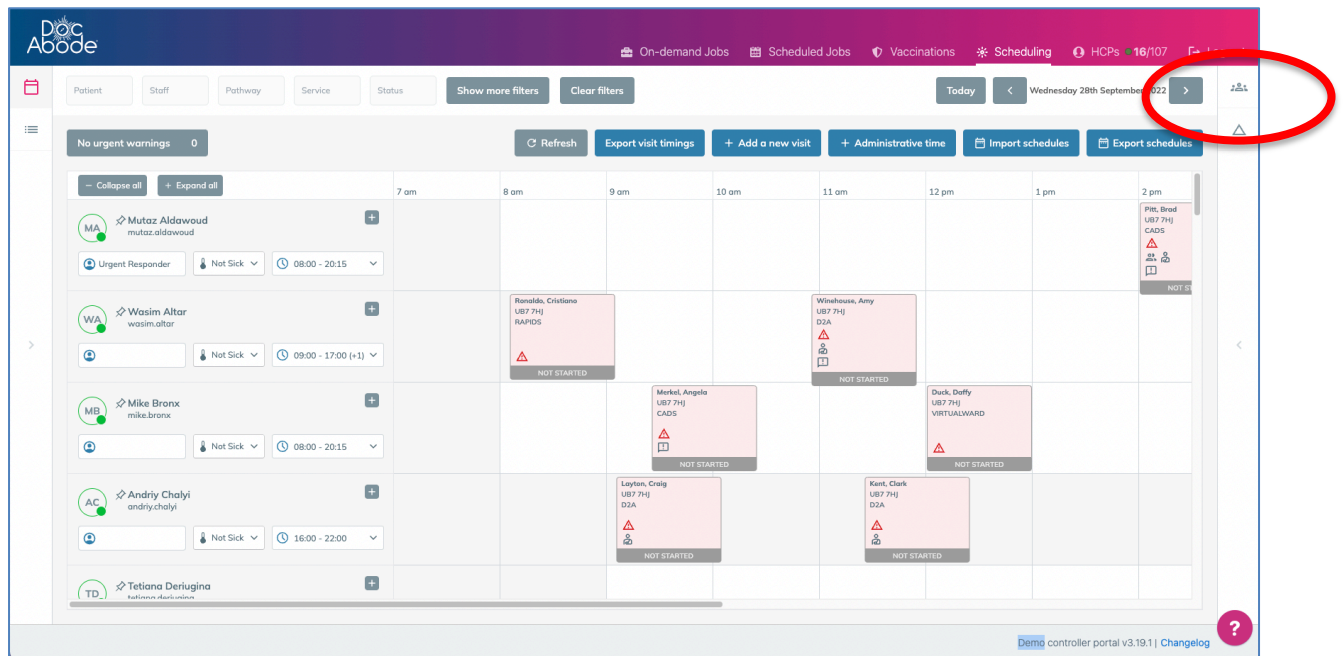
The icon on the top right, below *Log out* will present a list of unassigned visits, sorted as oldest first.
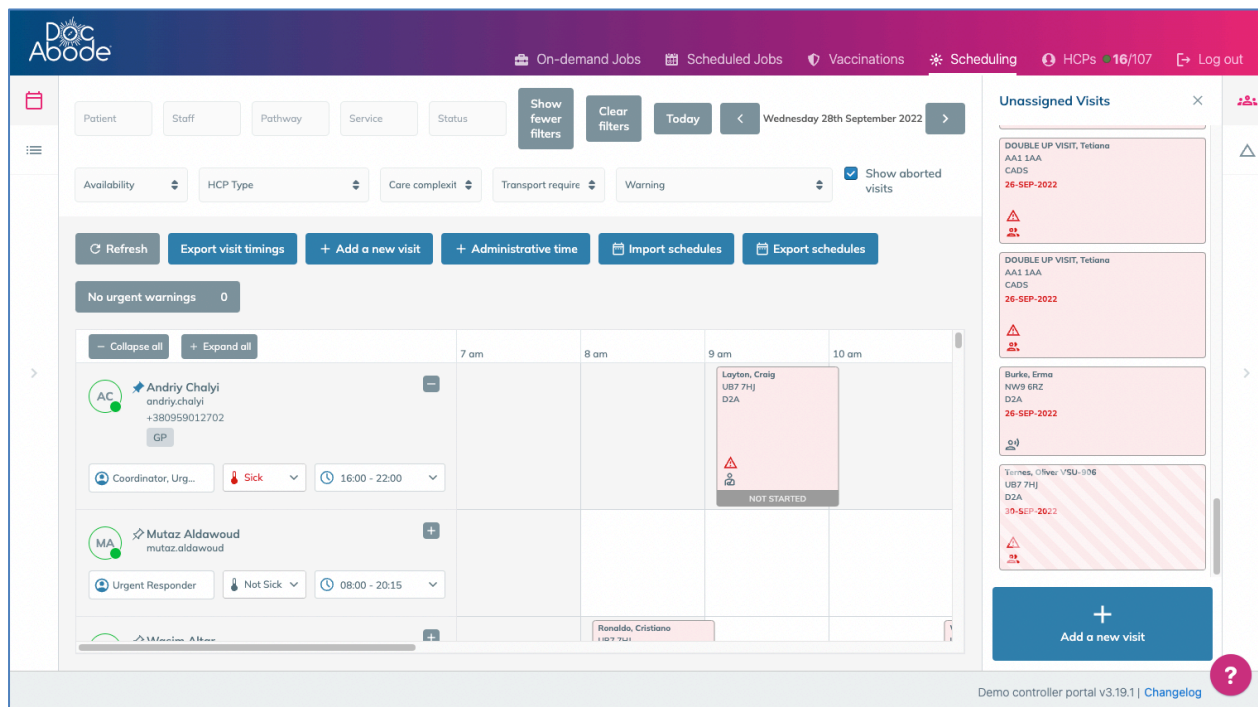
This panel can be used to drag-and-drop visits to an HCP swim lane, which is the easiest way of assigning a visit to an HCP.

New visits can be added via the *Add a new visit* button at the bottom of the unassigned visits list.

Further details about visit management are provided in other guides.

- **System information**

In the bottom right of the webpage the Controller can see
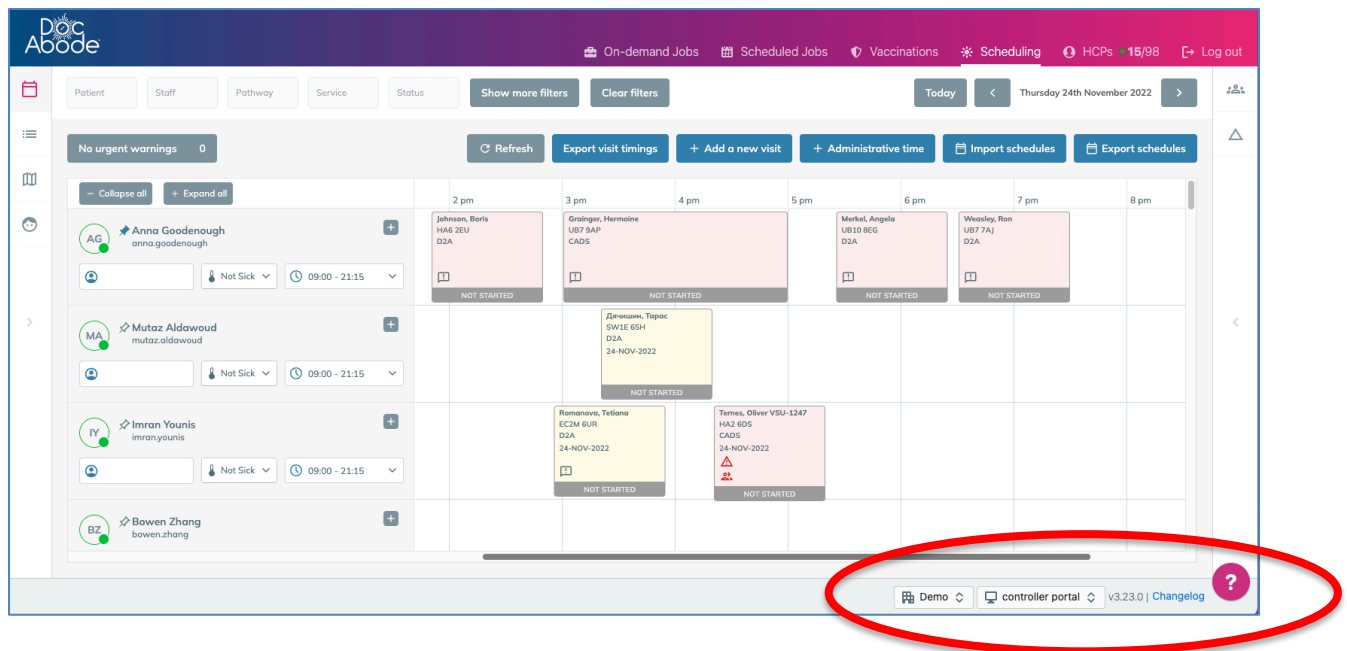- the **database name** (in this case it is set to Demo),
- the **access type** (controller portal). If the user also has administration rights then the admin web pages can be selected by pressing this and selecting the admin portal. Please see the user guide on administration functions for further details.
- the **system version number**, in this case it is version 3.19.1.
- *Changelog*. Pressing changelog will present release notes – brief summaries of the features that have been introduced or changed in recent releases. In this way, users are always able to see what's new and changed in the Doc Abode system. An update is issued every two weeks so it's worth checking the changelog to keep up to date with the latest features. These are also promptly communicated to nominated superusers for every customer, in a way that can be cascaded through the user population.

If you have any questions about new features in Doc Abode then please ask your nominated superusers.
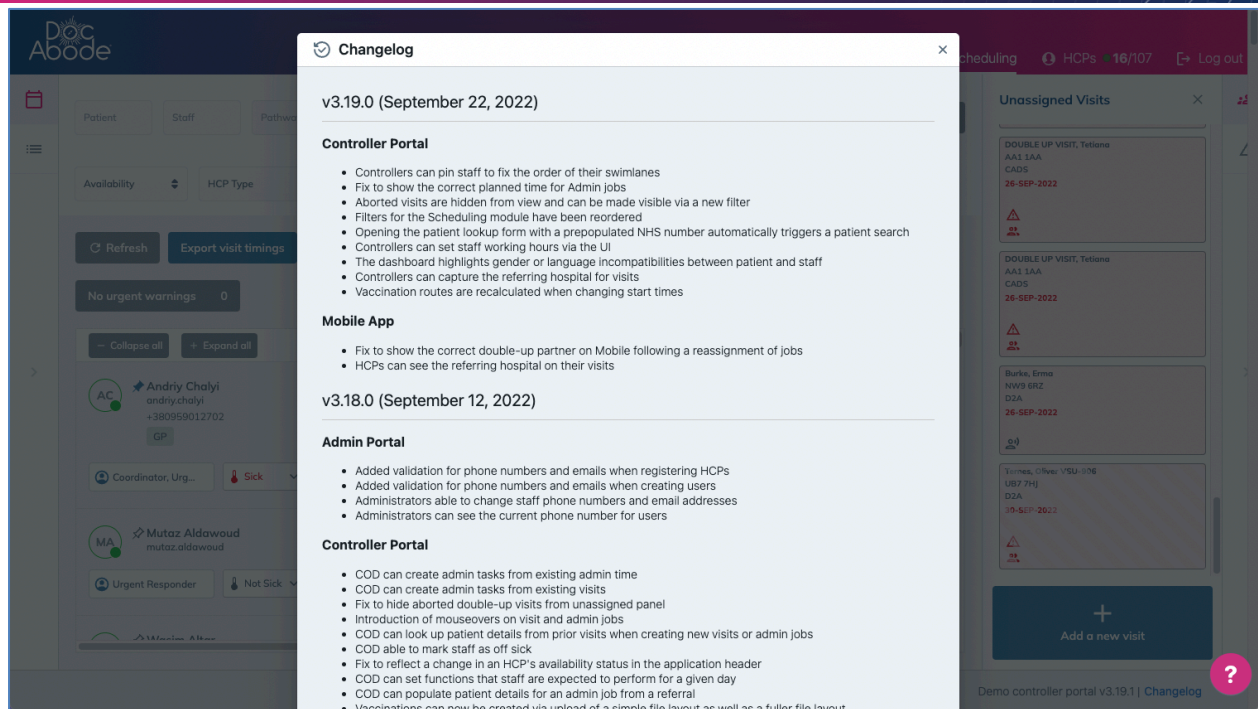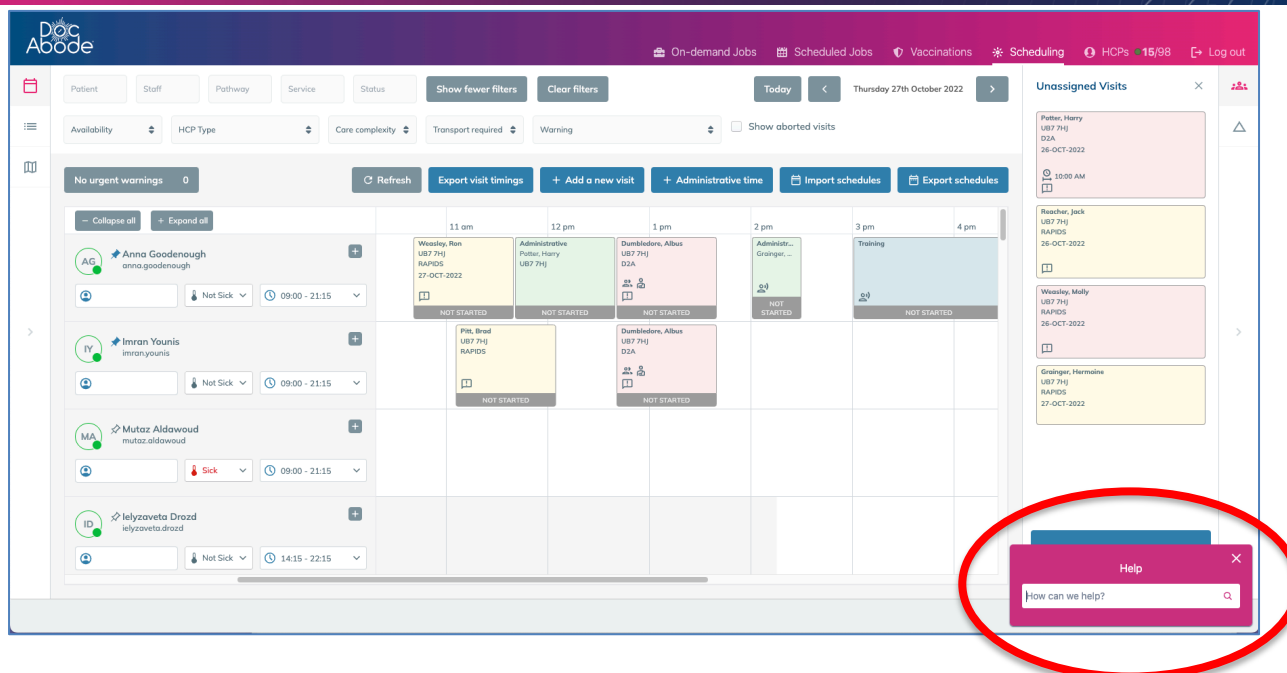
- **Raising a support ticket**
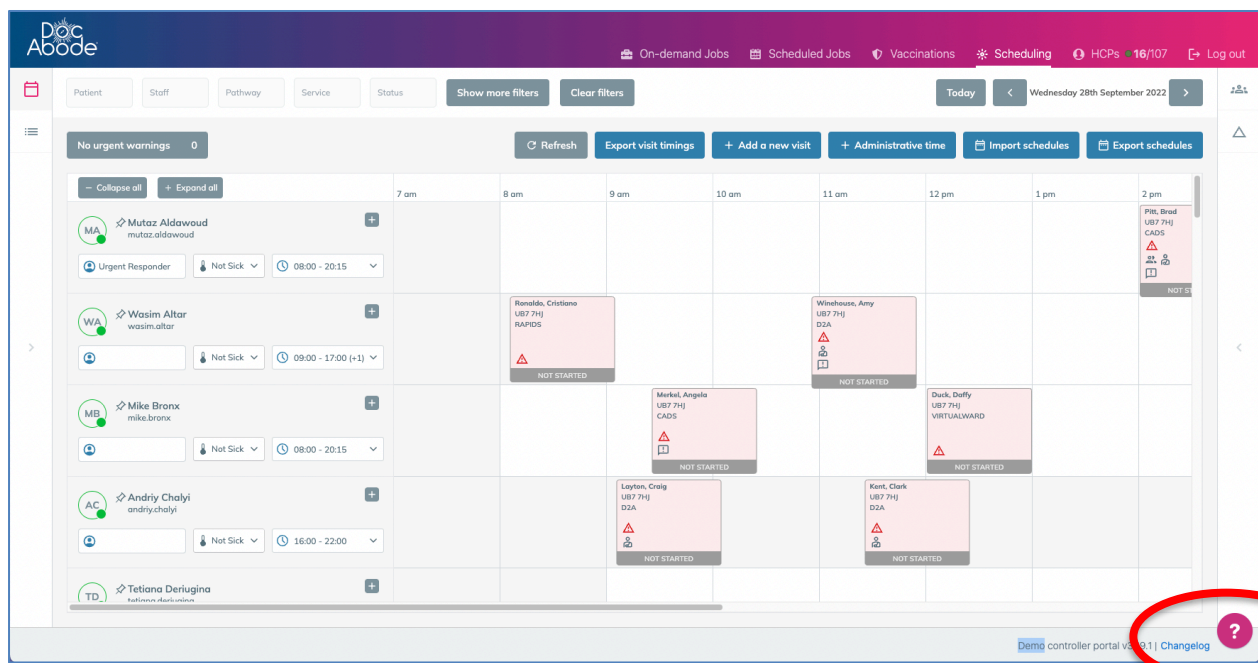
If there is a problem with the system that cannot be resolved internally, or the user wishes to advise Doc Abode of an idea for a new feature, then press the support (?) button in the bottom right of the webpage.

The following window appears

The controller can enter a free text question which the system interprets. In the background the help system decides which menu or menus are appropriate for this query. In practice there are three options

- Raise a bug
- Suggest a new feature
- Ask for general IT support (logins, passwords etc.)

In the example below the user has entered the single word *mobile* and as it's not obvious which of the options above applies then all three data entry options are presented.
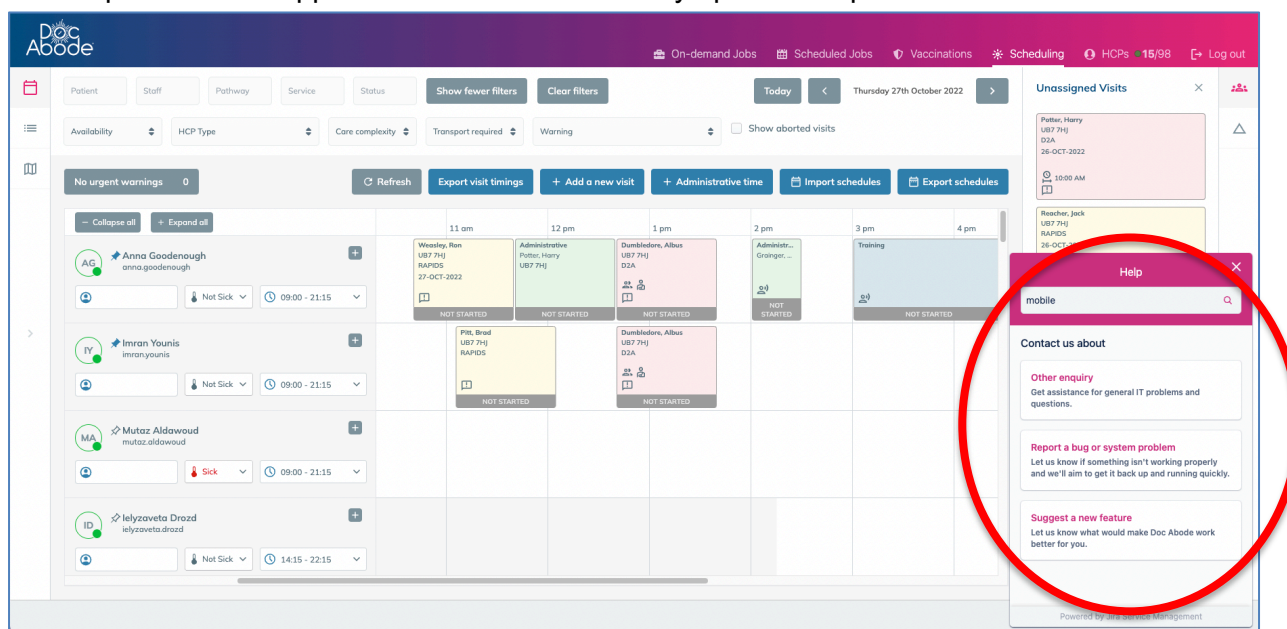
Enter details using the most appropriate form, with attachments if needed, and press *Send*. This will raise a ticket with the Doc Abode support desk.