



Scheduling System – Controller Functions

Viewing visits

This document describes how to how to find visits and then how to see the details about these visits.

1. Log in to Doc Abode on https://controller.docabode.com/ and select the Scheduling tab

	🚔 On-demand Jobs	Scheduled Jobs	Vaccinations	☆ Scheduling) HCPs e16 /104	[→ Log out
Clear filters			Tod	ay < Thursda	ay 29th September 2022	> :21
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2. A webpage similar to the example below is displayed.

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Visits can be found in a number of ways

- a) The filters at the top left can be used to find a subset of visits. This is a flexible search facility that will enable visit(s) of interest to be found.
 - The results can be presented in either the celendar or list view
- b) Unassigned visits can be viewed by selecting the icon on the top right



• The results are presented in a column on the right hand side of the webpage, latest first

Finding visits 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 displayed 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.

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							Demo controller porta	al v3.19.1 Changelog

The filters are presented on the top left of the webpage

The Show more filters button will provide additional filtering options.



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When the Show more filters button is pressed the following display is presented

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Patient	Staff	Pathway	Service	Status	Show fewer filters	Clear filters		Today < Thursday	y 29th September 2022	> :21
Availability	\$	НСР Туре	\$	Care complexity 🜲	Transport required 🖨	Warning	\$	Show aborted visits		\bigtriangleup

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



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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 presented.

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hou × S ff Pathway	Service Status	Show fewer filters	Clear filters	Today < Wednesday 2	8th September 2022	:81
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When the filter box contains arrows, this means the user can select one entry from a dropdown list. This list always has *All* at the top, which is an easy way to remove an unwanted filter.



oc ode	🚔 On-demand Jobs 🛛 🛱 Scheduled .	Jobs 🜓 Vaccinations 🔆 Scheduling	• HCPs ● 16 /107
Patient Staff Patience Service Status	Show fewer filters Clear filters	Today < Wednesda	y 28th September 2022
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OP Clinical Pharmacist No urgent varnings Clinical Pharmacist Advanced Nurse Practitioner C R Yesh Vaccine Administrator Vaccine Administrator	port visit timings + Add a new visit	+ Administrative time 🛗 Import schedules	🛱 Export schedules
Collige e all 4 Physiotherapist CP (visiting) MA Arturaz aldar MA Arturaz aldar Ma Chrome working) Health and Wellbeing Coach Other Allied Health Professional Image: Urgent Response Not Sick ✓ ① 08:00 - 20 cm ✓	8 am 9 am	10 am 11 am	12 pm
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By default the *Show aborted visit* checkbox is unticked. When this is ticked, all aborted visits will be displayed. These are easily recognised 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.

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	Patient, Demo AA1 1AA D2A ABORTED BY HCP				<



Viewing visits on the main page

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The default presentation of the main part of the page is a sideways calendar view of HCPs, showing their planned visits. We refer to these a swim lanes. This icon is shown in red. The button below that looks like a bulleted list, by pressing that button the controller is presented with a list of visits, sorted alphabetically by patient surname, as shown below. The bulleted list icon is now shown in red.

8	Patient	Staff Pathway	Service	Status	Sh	ow more filters	Clear filters				Todo	y < Wednesday	28th September 202	2
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	NHS number	Patient	Date of birth	Gender	Postcode	Pathway	Service / activity	Planned time	Duration	Actual start time	Actual end time / cancelled time	Staff	Status	
	4893280474	Melody Brewer	24/04/1991	Female	NW10 0BG	CADS	2d reablement		01:15				Unassigned	
	4609555804	Erma Burke	08/12/1939	Female	NW9 6RZ	D2A			01:00				Unassigned	
	8420410027	Douglas Floyd	14/01/1963	Male	NW7 1GF	CADS	Within 2h response		01:15				Unassigned	
>	7695995369	Fred Lyons	26/12/1988	Male	NW10 2SD	D2A	Other		01:15				Unassigned	
	5487963247	Angela Merkel	01/01/2010	Female	UB7 7HJ	Rapids	0-1 day response		01:00				Unassigned	
	5487963211	Austin POWERS	01/01/2010	Male	UB7 7HJ	D2A	0-1 day response		01:00				Unassigned	
	9873654738	Tetiana Romanova	23/09/2022	Female	AA1 1AA	Rapids	Over 2h response		01:00				Unassigned	
	8341149533	Linda Romero	11/11/1969	Female	NW4 2BY	Virtual Ward			01:15				Unassigned	
	9873654738	Tetiana Romanova	10/08/2022	Female	AA1 1AA	Rapids	Within 2h response	10/08/2022 12:55 PM	01:00				Unassigned	



By using a combination of the filters and choosing the best main page layout it is easily possible to find any visit(s) of interest.

It is also possible to find only unassigned visits by selecting the icon on the top right of the page.

Viewing unassigned visits

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The icon on the top right, below *Log out* will present a list of unassigned visits, sorted with the oldest first.



Patient Staff Pathway Service Status	Show fewer filters	Wednesday 28th September 2022	> Anassigned Visits
Availability \$ HCP Type \$ Care complexit \$	Transport require 🖨 Warning	Show abort visits	DOUBLE UP VISIT, Tetiana Aut IAA CADS 26-SEP-2022
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- Collapse all + Expand all 7 a	m 8 am	9 am 10 am	<u>A</u>
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Coordinator, Urg		د ک Not started	Ternes, Offwer VSU-906 U877HJ D2A 19-SEP-2022
MA * Mutaz Aldawoud *			▲ 2.
			+
Alter 1	Ronaldo, Cristiano		Add a new visit

Viewing Visit Details

All of the search options will present only key information about a visit, and when that information is not sufficient the controller is able to view full details

Viewing further details from the calendar view mouseover

In calendar view, when the controller's mouse hovers over a visit tile, further details are displayed, as in the example below.

Note that in future releases the size and content of the mouseover may change, this is the display at the time of writing.





Viewing full details

Whether in calendar view, list view, map view or in the list of unassigned visits, selecting a visit by pressing on the tile or row or icon containing the visit the lower part of the main page will change to present full details. These may be just viewed or further actions performed. In this guide we will only describe viewing options, please see other guides for details of how to change visit details.

The image below shows the visit window selected from the calendar view



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	Planned start time of the visit is in the past! Patient details	Visit details		Visit timing			
	Address Kirk House High Street Yiewsley West Drayton UB7 7HJ	Referrer Pathway Service	Not set D2A 0-1 day response	Earliest date of visit Earliest time of visit	Not set		0
					Demo controlle	er portal v3.19.1 Change	elog

The image below shows the impact of selecting this visit from the list view

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5487963246	Hilary Clinton	01/01/2010	Female	UB7 7HJ	D2A	U-1 day response	28/09/2022 08:00 AM	01:00	28/09/2022 09:20 AM	28/09/2022 09:36 AM	Imro
5487963235	Cristiano Ronaldo	01/01/2010	Male	UB7 7HJ	Rapids	0-1 day response	28/09/2022 08:05 AM	01:00			Wa
5487963240	Craig Layton	01/01/2010	Male	UB7 7HJ	D2A	0-1 day response	28/09/2022 09:05 AM	01:00			Anc
Amy Wineho	use NOT STARTED	c				cr	eated by Imran You	nis on 27th Septe	ember 2022 - last upd	 Actions ated Imran Younis on 28th Septer 	mber 2022
🛕 Plann	ned start time of the visit is ir	the past!									
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Futient deta		Address Kirk House High Street					Referrer Not set				
Address	Kirk House High Street		Re	eferrer	Not se	et		Earliest da of visit	te Not	set	

Finally, this is the presentation from the unassigned visits pane



Patient	Staff Pathway	Service	Status	Shi ma	ow ore ers	r s Today	K Wednesday	28th Septembe	2022 >	Unassigned Visits
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NHS number	Patient	Date of birth	Gender	Postcode	Pathway	Service / activity	Planned time	Duration	Actual st time	CADS 26-SEP-2022
4893280474	Melody Brewer	24/04/1991	Female	NW10 0BG	CADS	2d reablement		01:15		۵ ۲
4609555804	Erma Burke	08/12/1939	Female	NW9 6RZ	D2A			01:00		Burke, Erma NW9 6RZ D2A 26-SEP-2022
Erma Burke			•					~ Actions	×	21) Terres, Oliver VSU-906 97 7HJ
				create	d by visit.generato	on 9th August 2022 last	updated Oli 🔐 Ter	nes on 26th Septe	mber 2022	р. 30. р-2022
Patient detai	ls	Visit	t details			Visit timir	ng			2
Address	123 Sheaveshill Avenu London	e Refe	rrer	- Not set		Earliest da of visit	te Not	ser	-	+
4.50	NW9 6R2	Path	. way	D2A		Earliest tin	ne Not	set		Add a new visit

As you can see, the impact of selecting a particular visit is always the same.

Note that if you press on a different visit, the details will change to show the newly selected visit. Pressing the X at the top right of the visit window will close it.

From the visit details section, the controller can do the following

- scroll down the window presented using the scroll bar, which shows patient details only
- view full details.

To view full details, press the action button and select View full details



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:=	C Refresh	Export visit timings	+ Add a new vi	sit +	Administrativ	e time 🗮 📅	Import schedules	🖶 Export s	chedules		DOUBLE UP VISIT, Tetione AA11AA CADS 26-SEP-2022	
	No urgent wa	rnings 0 Patient	Date of birth	Gender	Postcode	Pathway	Service / activity	Planned time	Duration	Actual st time	AA11AA CADS 26-SEF-2022	
>	4893280474 4609555804	Melody Brewer Erma Burke	24/04/1991 08/12/1939	Female Female	NW10 0BG NW9 6RZ	CADS D2A	2d reablement		01:15		Burke, Erma NV9 6RZ D2A 25:5FP-2022	ן י
	Erma Burke	UNASSIGNED 🧪 🤇	3						~ Action	s X	2) Iornes, Offwer VSU-906 ∀7Hj	
	Age	82	Serv	way ice	create	d by visit.generato	r on 9th August 2022 last Earliest tin of visit	updated Oi er Ter ne Not	ne: View full d se Cancel Create foll	etails ow-up visit	194 2222 A	
	Date of birth Gender NHS number	08 Dec 1939 Female 4609555804	Com Car r # Sto	plexity equired Iff required	Non-com No 1	nplex	Planned st Planned di Planned ei	tart – Not uration 01:0 nd – Not	set 00 set		+ Add a new visit	
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A webpage similar to the one below will be displayed. Note the heading section and choice of options on display will differ according to the status of the visit. The viewing options remain consistent

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8	Patient St		Show Clear		1 201 0 1 1 202	Una	ssigned Visits	× :2
=		Edit visit	created by Imran Younis	on 27th September 2022 last	updated by Imran Younis a	n 28th Septer	X tiana	
	C Refresh	Patient details 🧷						
	No urgent warnin	NHS number 5487963251					tiana	
	- Collapse all	Name Winehouse, Amy						
	MA Mutaz mutaz.	Phone number(s) Not set						
	Urgent Respor	Date of birth 01/01/2010						
		Gender Female						
	Amy Winehouse	Address line 1 Kirk House					6	
	Blannad	Address line 2 High Street						
	Patient details	Address line 3 Yiewsley						
	Address	Town West Drayton					new visit	
						Demo co	ntroller portal v3.19.1 Cha	ingelog ?

The central window enables the controller to view or edit a visit. This is displayed in three sections, which can be expanded or contracted via the arrows on the top right. The controller can also use the mouse to scroll down the page.





The controller can easily navigate through the window to see details about the patient, the referral and the care required.

By selecting a pencil icon the controller is able to edit visit details, and there are various actions that can be taken via buttons at the bottom of the window. These features are described in other user guides.