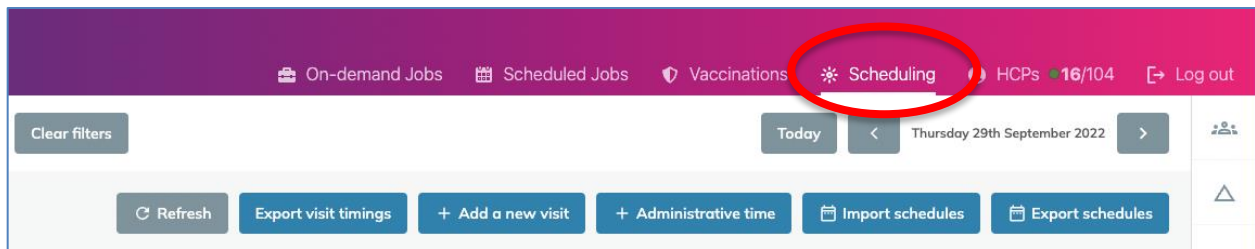# Scheduling System – Controller Functions
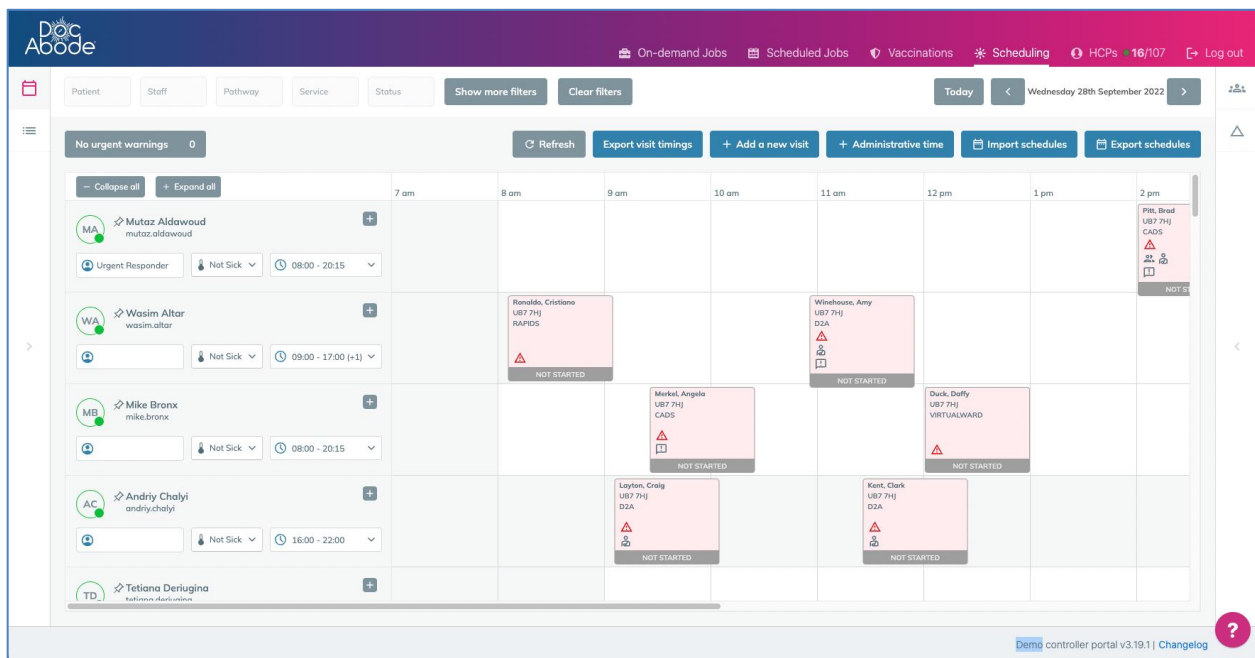
Viewing visits

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 as a COD https://controller.docabode.com/ and select the Scheduling tab

2. A webpage similar to the example below is displayed.


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 grid 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.
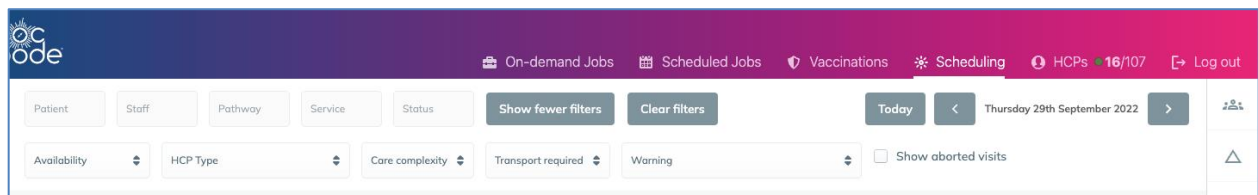
The filters are presented on the top left of the webpage
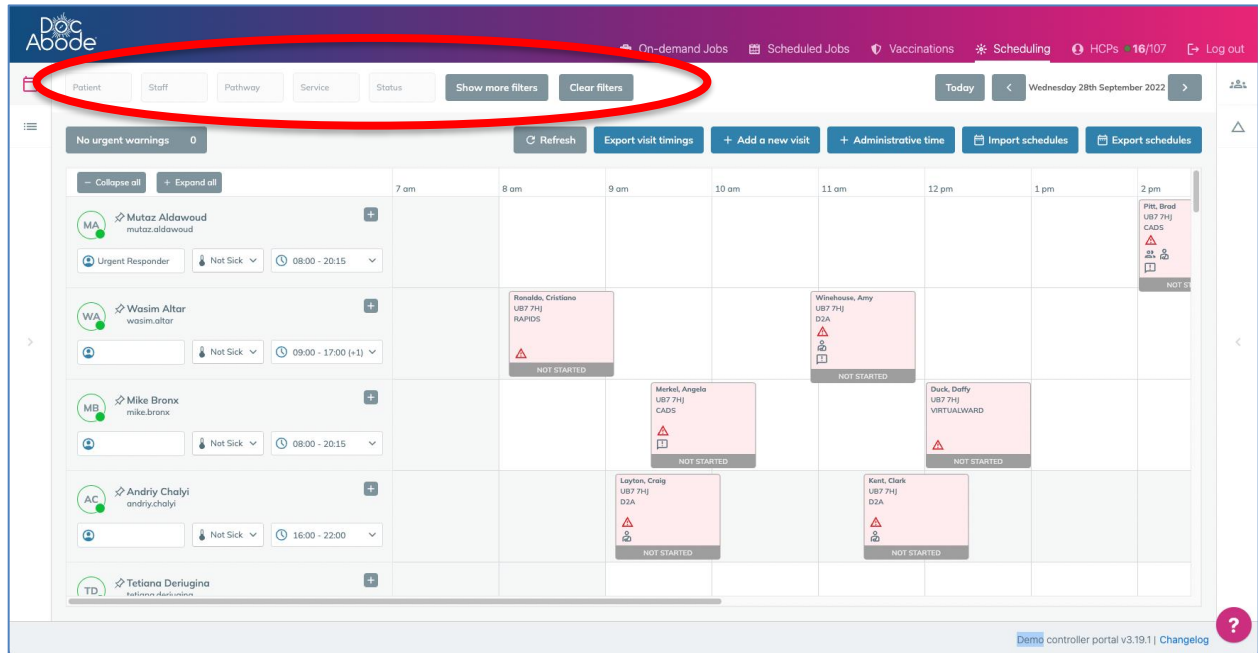
The *Show more filters* button will provide additional filtering options.
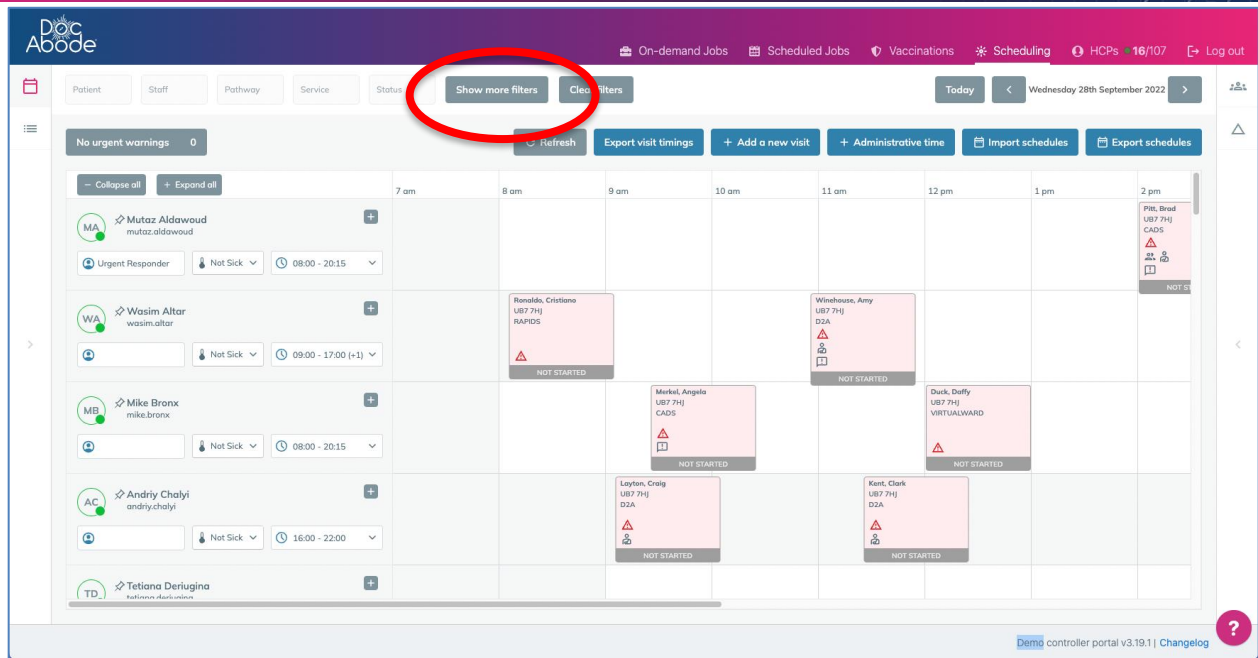
When the *Show more filters* button is pressed the following display is presented

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

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.

When the filter box contains arrows, this means the user can select one entry from a drop-down list. This list always has *All* at the top, which is an easy 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 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.

Viewing visits on the main page

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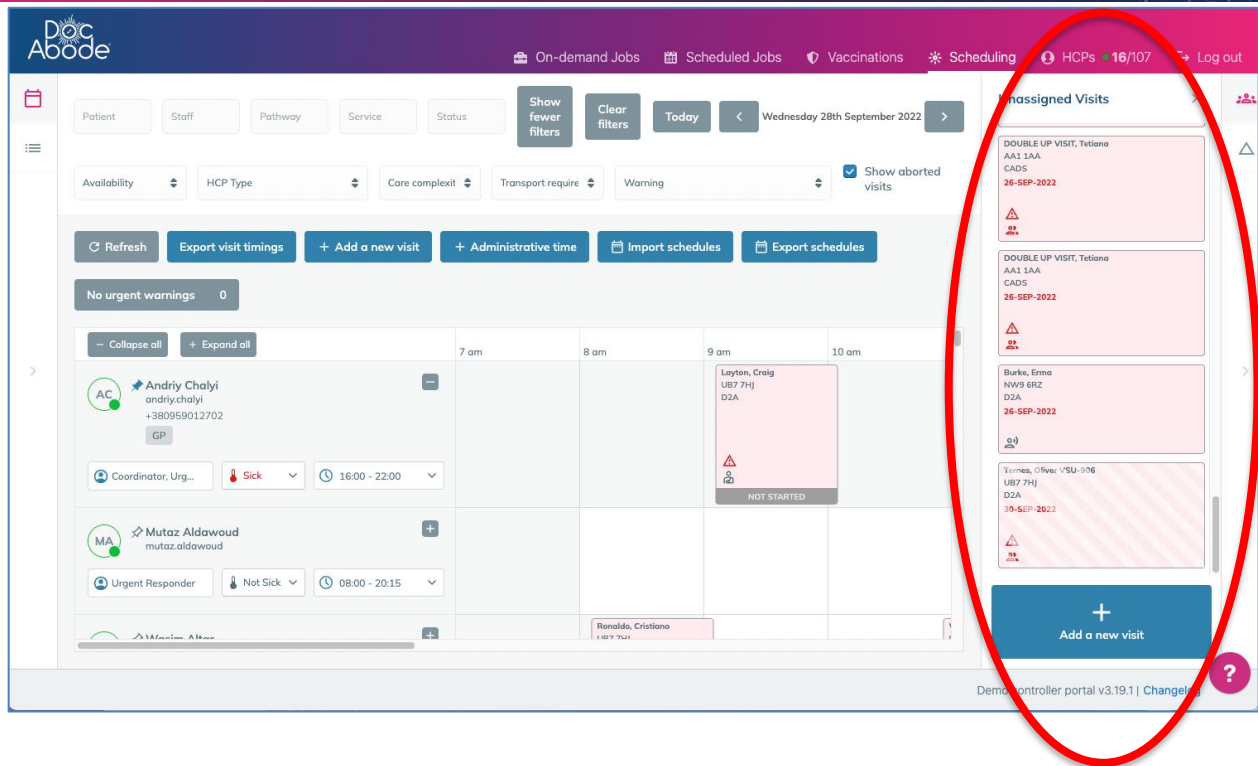
By using a combination of the filters and choosing the best main page layout it is easily possible to find any visit(s) of interest.

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

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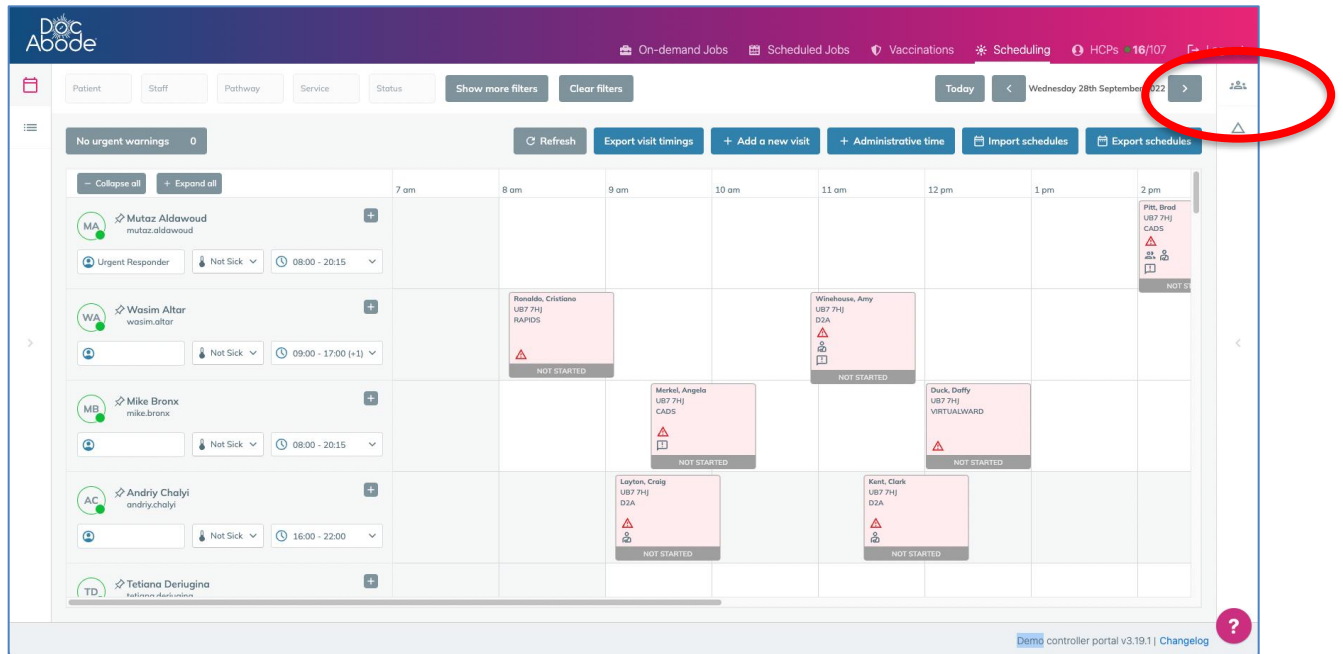
The icon on the top right, below *Log out* will present a list of unassigned visits, sorted with the oldest first.
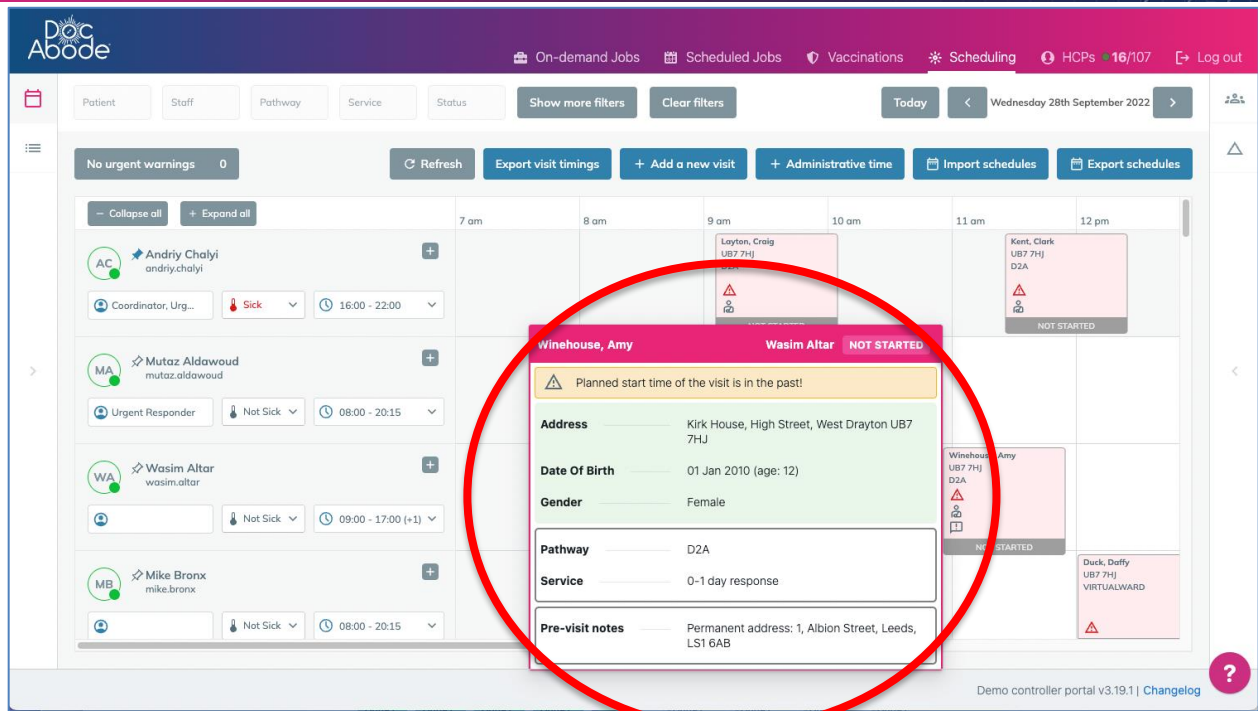
Viewing Visit Details

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 grid view mouseover

In grid 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 grid view, list view or in the list of unassigned visits, selecting a visit by pressing on the tile or row 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 grid view

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

Finally, this is the presentation from the unassigned visits pane

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*

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

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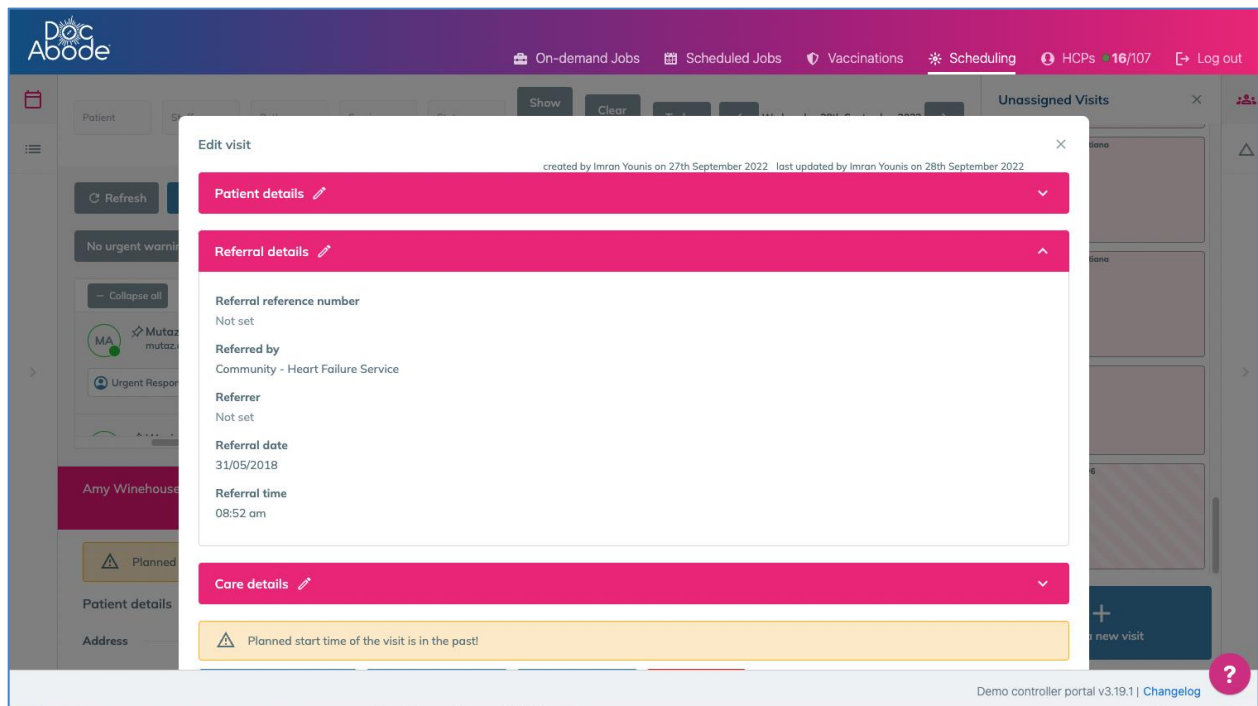
The controller can easily navigate through the window to see details about the patient, the referral and the care required.

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.