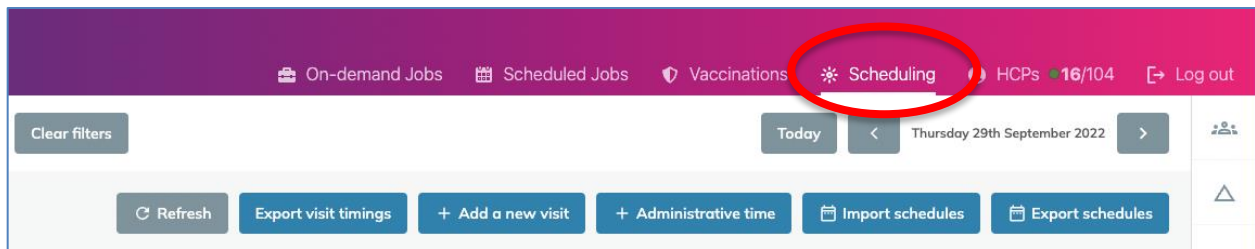


Scheduling System – Controller Functions

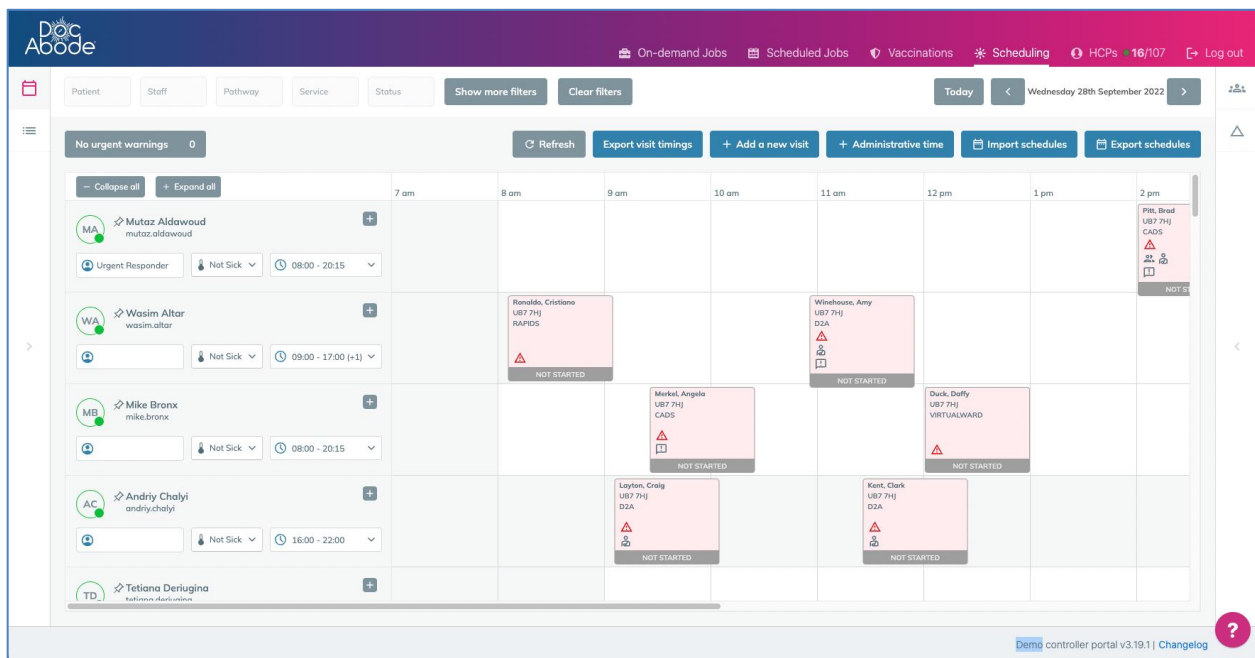
Viewing visits

This document describes 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

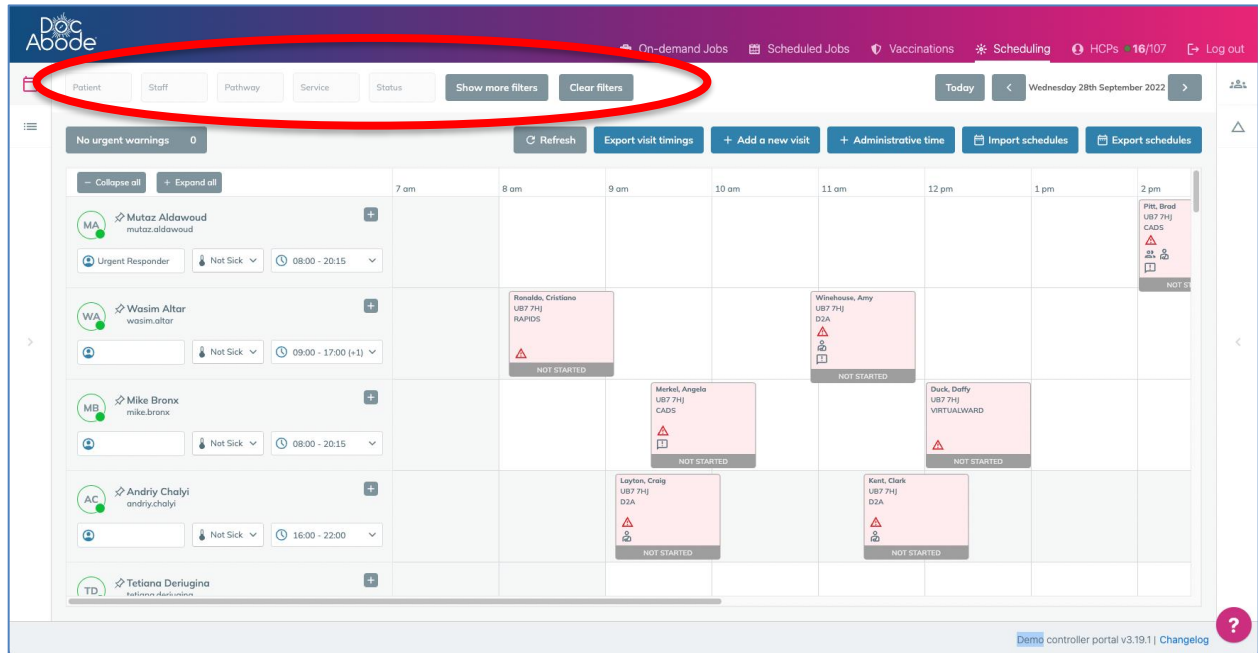
- a) The filters at the top left can be used to find a subset of visits. This is a flexible search facility that will enable visit(s) of interest to be found.
 - The results can be presented in either the grid or list view
- b) Unassigned visits can be viewed by selecting the icon on the top right

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

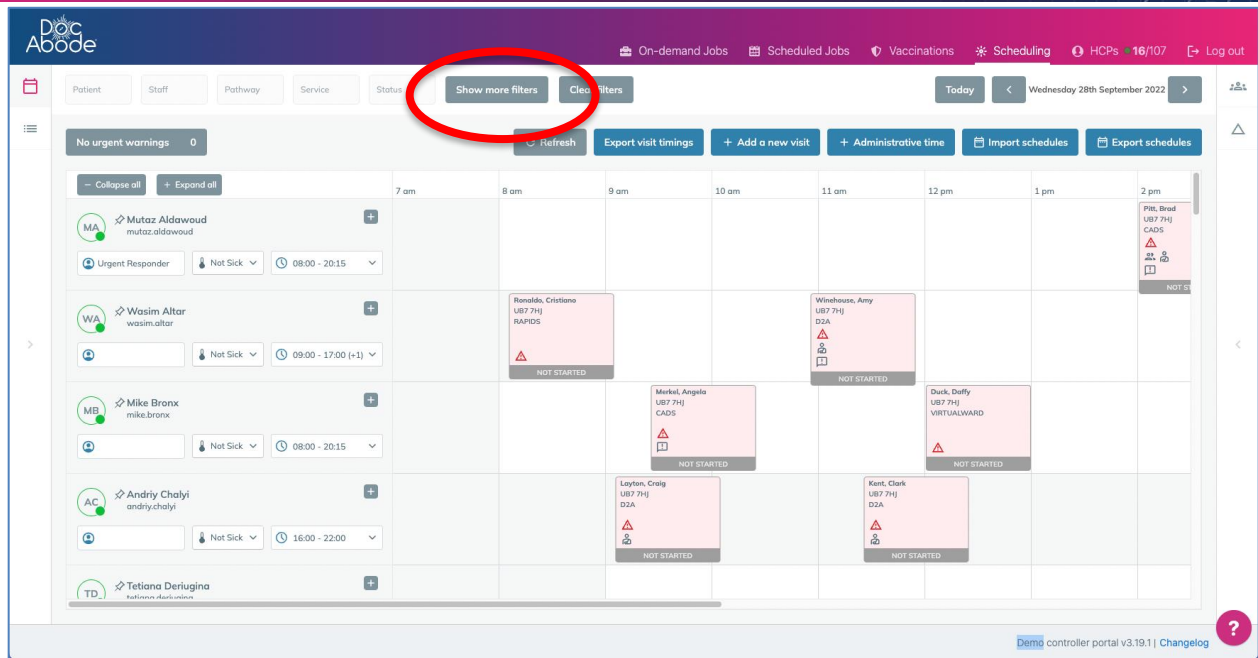
Finding visits using filters

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.

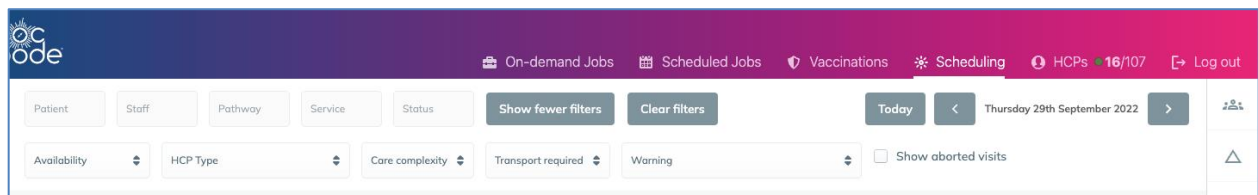
The filters are presented on the top left of the webpage



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

The screenshot shows the Doc Abode Scheduling Controller interface. At the top, there are navigation tabs: On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling (active), HCPs (16/107), and Log out. Below the navigation bar, there are filter buttons: Staff, Pathway, Service, Status, Show fewer filters, and Clear filters. A date selector shows 'Today' and 'Wednesday 28th September 2022'. A search bar contains the text 'mer' and 'hou', with a red circle highlighting the 'x' icons next to each name. Below the search bar, there are dropdown menus for Availability, HCP Type, Care complexity, Transport required, and Warning. A 'Show aborted visits' checkbox is also present. The main area displays a list of HCPs: Mutaz Aldawoud (MA), Wasim Altar (WA), and Mike Bronx (MB). Each HCP has a status icon, a name, a role, a 'Not Sick' indicator, and a time slot. The time slots are 7 am, 8 am, 9 am, 10 am, 11 am, and 12 pm. The 10 am slot shows a red box for 'Merkel, Angela' and a red box for 'Winehouse, Amy'. The 11 am slot shows a red box for 'Winehouse, Amy'. The 12 pm slot shows a red box for 'Winehouse, Amy'. The 10 am slot also shows a red box for 'Merkel, Angela'.

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.

The screenshot shows the Doc Abode Scheduling Controller interface after the filter 'mer' has been removed. The search bar now only contains 'hou', which is highlighted with a red circle. The rest of the interface is the same as the previous screenshot, showing the list of HCPs and the time slots. The 10 am slot shows a red box for 'Merkel, Angela' and a red box for 'Winehouse, Amy'. The 11 am slot shows a red box for 'Winehouse, Amy'. The 12 pm slot shows a red box for 'Winehouse, Amy'.

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.

Doc Abode

On-demand Jobs Scheduled Jobs Vaccinations Scheduling HCPs 16/107 Log out

Patient Staff Patients Service Status Show fewer filters Clear filters Today Wednesday 28th September 2022

Availability ☒ HCP Type All GP Clinical Pharmacist Advanced Nurse Practitioner Vaccine Administrator Physiotherapist GP (visiting) GP (home working) Health and Wellbeing Coach Other Allied Health Professional

No urgent warnings Refresh Export visit timings Add a new visit Administrative time Import schedules Export schedules

7 am 8 am 9 am 10 am 11 am 12 pm

MA Mutaz Alda Not Sick 08:00 - 20:15

WA Wasim Altar Not Sick 09:00 - 17:00 (+1)

MB Mike Bronx Not Sick 08:00 - 20:15

Ronaldo, Cristiano UB7 7H RAPIDS NOT STARTED

Winehouse, Amy UB7 7H D2A NOT STARTED

Merkel, Angela UB7 7H CABS NOT STARTED

Duck, Duffy UB7 7H VIRTUALWARD NOT STARTED

Layton, Craig Kent, Clark

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.

Vaccinations Scheduling HCPs 16/107 Log out

Today Thursday 22nd September 2022

☒ Show aborted visits

Administrative time Import schedules Export schedules

1 pm 2 pm 3 pm

Patient, Demo AA1 1AA D2A

ABORTED BY HCP

Viewing visits on the main page

The screenshot shows the Doc Abode Scheduling Controller 2 interface. The top navigation bar includes links for On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling, HCPs (16/107), and Log out. The left sidebar contains a calendar icon (highlighted with a red circle) and a list of HCPs: Mutaz Aldawoud, Wasim Altar, Mike Bronx, Andriy Chalyi, and Tetiana Deriugina. The main area displays a sideways calendar view for Wednesday 28th September 2022, showing planned visits for each HCP. Visits are represented by colored blocks with details like patient name, HCP name, and status (e.g., NOT STARTED).

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.

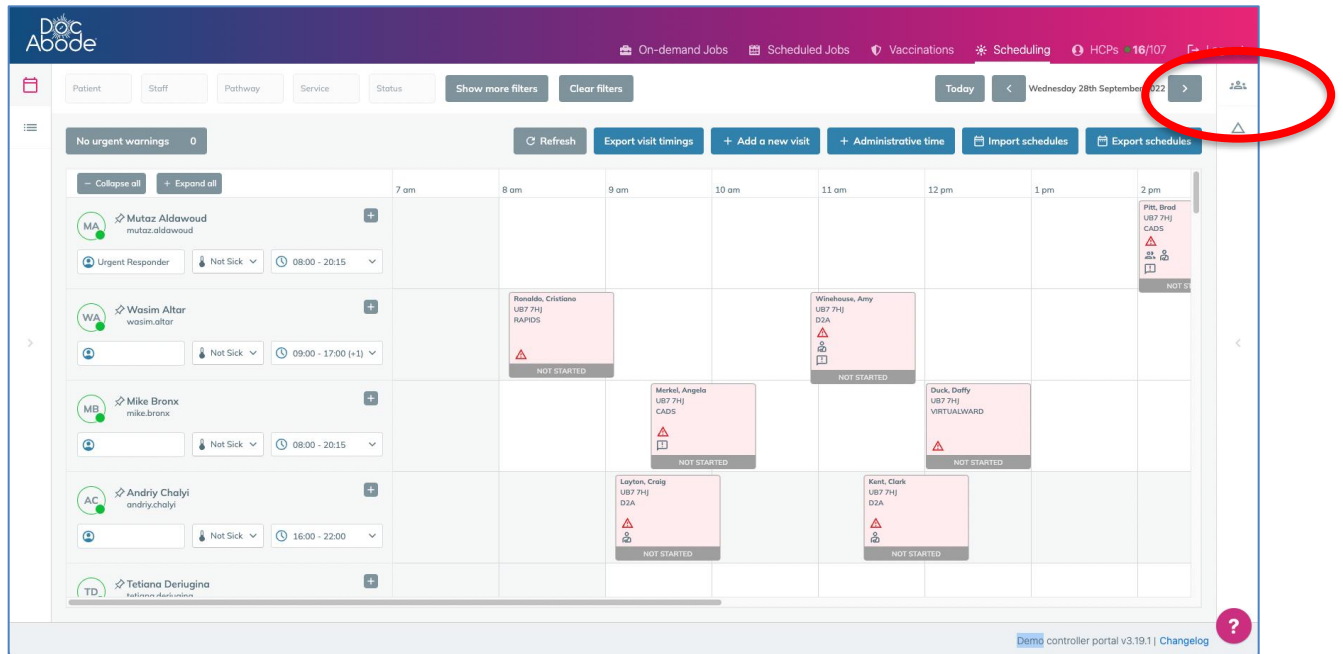
The screenshot shows the Doc Abode Scheduling Controller 2 interface with the list view selected. The left sidebar now shows a bulleted list icon (highlighted with a red circle) instead of the calendar icon. The main area displays a table of visits, sorted alphabetically by patient surname.

| NHS number | Patient | Date of birth | Gender | Postcode | Pathway | Service / activity | Planned time | Duration | Actual start time | Actual end time / cancelled time | Staff | Status | File |
|------------|------------------|---------------|--------|----------|--------------|--------------------|---------------------|----------|-------------------|----------------------------------|-------|------------|------|
| 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 | |

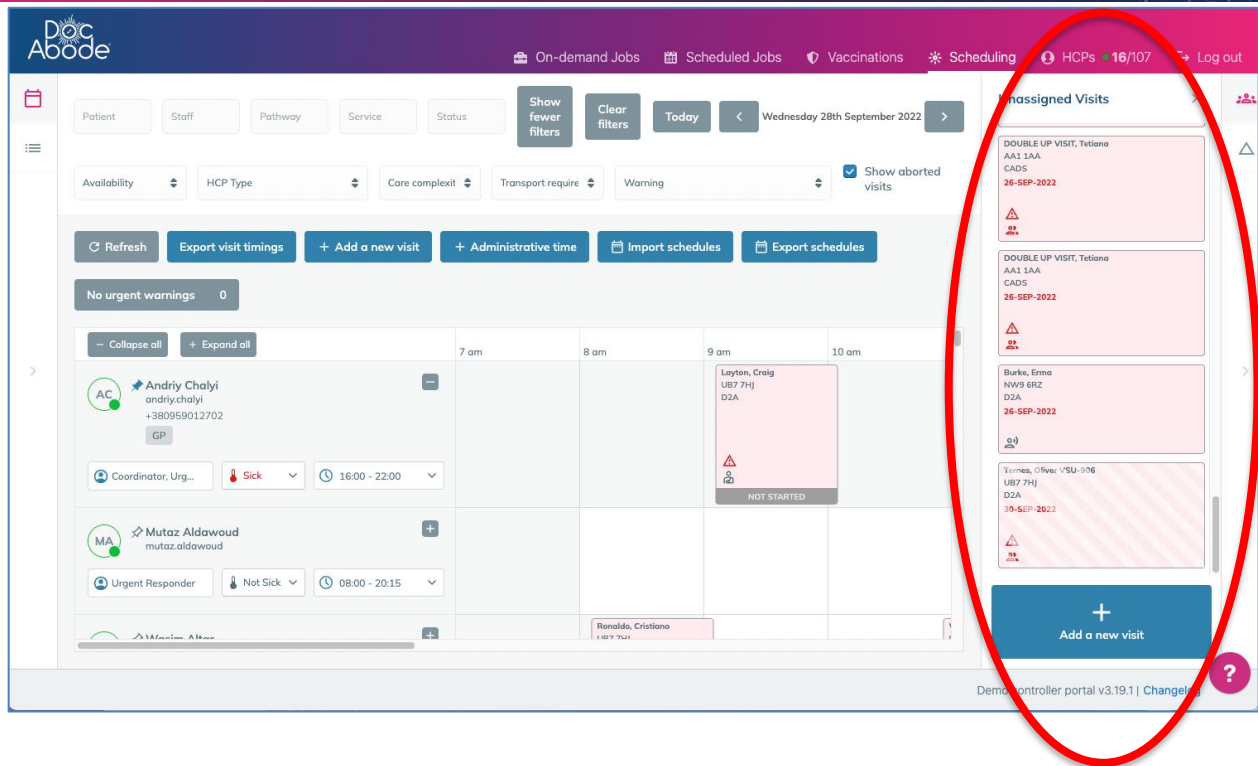
By using a combination of the filters and choosing the best main page layout it is easily possible to find any visit(s) of interest.

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

Viewing unassigned visits



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



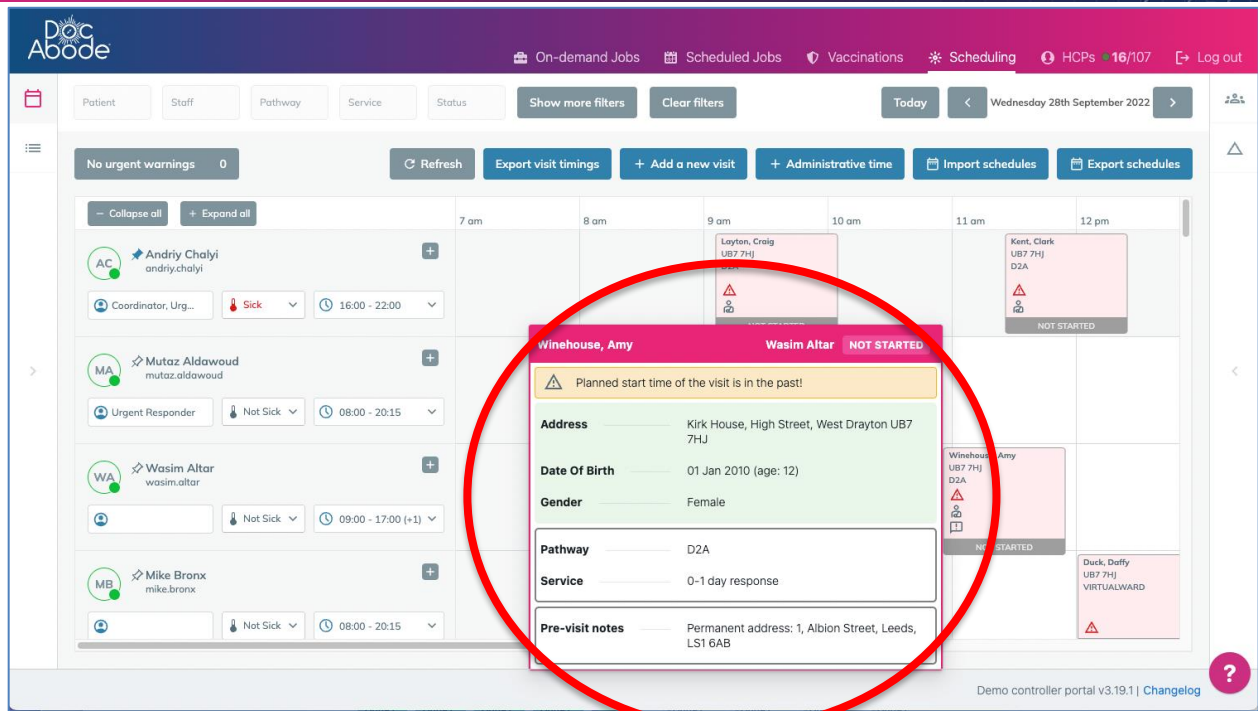
Viewing Visit Details

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

Doc Abode

On-demand Jobs Scheduled Jobs Vaccinations Scheduling HCPs 16/107 Log out

Patient Staff Pathway Service Status Show more filters Clear filters Today Wednesday 28th September 2022

No urgent warnings 0 Refresh Export visit timings Add a new visit Administrative time Import schedules Export schedules

7 am 8 am 9 am 10 am 11 am 12 pm

AC Andriy Chalyi andriy.chalyi Coordinator, Urg... Sick 16:00 - 22:00

MA Mutaz Aldawoud mutaz.aldawoud

Layton, Craig UB7 7HJ D2A NOT STARTED

Kent, Clark UB7 7HJ D2A NOT STARTED

Amy Winehouse NOT STARTED Actions

created by Imran Younis on 27th September 2022 last updated Imran Younis on 28th September 2022

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 Not set Pathway D2A Service 0-1 day response Earliest date of visit Not set Earliest time of visit Not set

Demo controller portal v3.19.1 | Changelog

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

Doc Abode

On-demand Jobs Scheduled Jobs Vaccinations Scheduling HCPs 16/107 Log out

Patient Staff Pathway Service Status Show more filters Clear filters Today Wednesday 28th September 2022

No urgent warnings 0 Refresh Export visit timings Add a new visit Administrative time Import schedules Export schedules

| NHS number | Patient | Date of birth | Gender | Postcode | Pathway | Service / activity | Planned time | Duration | Actual start time | Actual end time / cancelled time | Status |
|------------|-------------------|---------------|--------|----------|---------|--------------------|---------------------|----------|---------------------|----------------------------------|--------|
| 5487963246 | Hilary Clinton | 01/01/2010 | Female | UB7 7HJ | D2A | 0-1 day response | 28/09/2022 08:00 AM | 01:00 | 28/09/2022 09:20 AM | 28/09/2022 09:36 AM | Impr |
| 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 Winehouse NOT STARTED Actions

created by Imran Younis on 27th September 2022 last updated Imran Younis on 28th September 2022

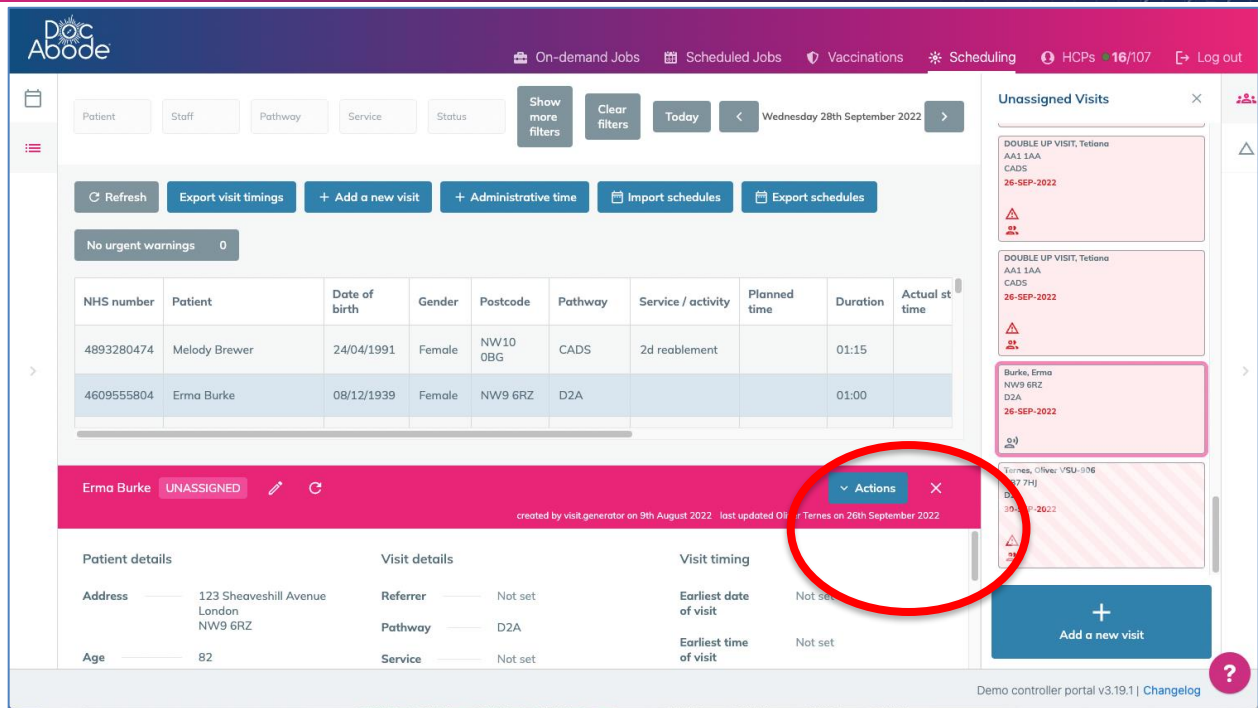
Planned start time of the visit is in the past!

Patient details Visit details Visit timing

Address Kirk House High Street Yiewsley West Drayton UB7 7HJ Referrer Not set Pathway D2A Service 0-1 day response Earliest date of visit Not set Earliest time of visit Not set

Demo controller portal v3.19.1 | Changelog

Finally, this is the presentation from the unassigned visits pane



The screenshot shows the Doc Abode Scheduling Controller 2 interface. At the top, there are navigation tabs: On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling (selected), HCPs 16/107, and Log out. Below the navigation, there are filters for Patient, Staff, Pathway, Service, and Status. A date selector shows Wednesday 28th September 2022. A toolbar includes buttons for Refresh, Export visit timings, Add a new visit, Administrative time, Import schedules, and Export schedules. A status bar indicates 'No urgent warnings 0'. A table lists visits with columns: NHS number, Patient, Date of birth, Gender, Postcode, Pathway, Service / activity, Planned time, Duration, and Actual start time. Two visits are shown: Melody Brewer (4893280474) and Erma Burke (4609555804). Below the table, a detailed view for Erma Burke is shown, including patient details (Address: 123 Sheaveshill Avenue, London NW9 6RZ; Age: 82), visit details (Referrer: Not set; Pathway: D2A; Service: Not set), and visit timing (Earliest date of visit: Not set; Earliest time of visit: Not set). A red circle highlights the 'Actions' button in the visit details section. On the right, an 'Unassigned Visits' panel shows a list of unassigned visits, including 'DOUBLE UP VISIT, Tetiana AA1 1AA CADS 26-SEP-2022' and 'Burke, Erma NW9 6RZ D2A 26-SEP-2022'. At the bottom right, there is a '+ Add a new visit' button and a 'Demo controller portal v3.19.1 | Changelog' link.

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.

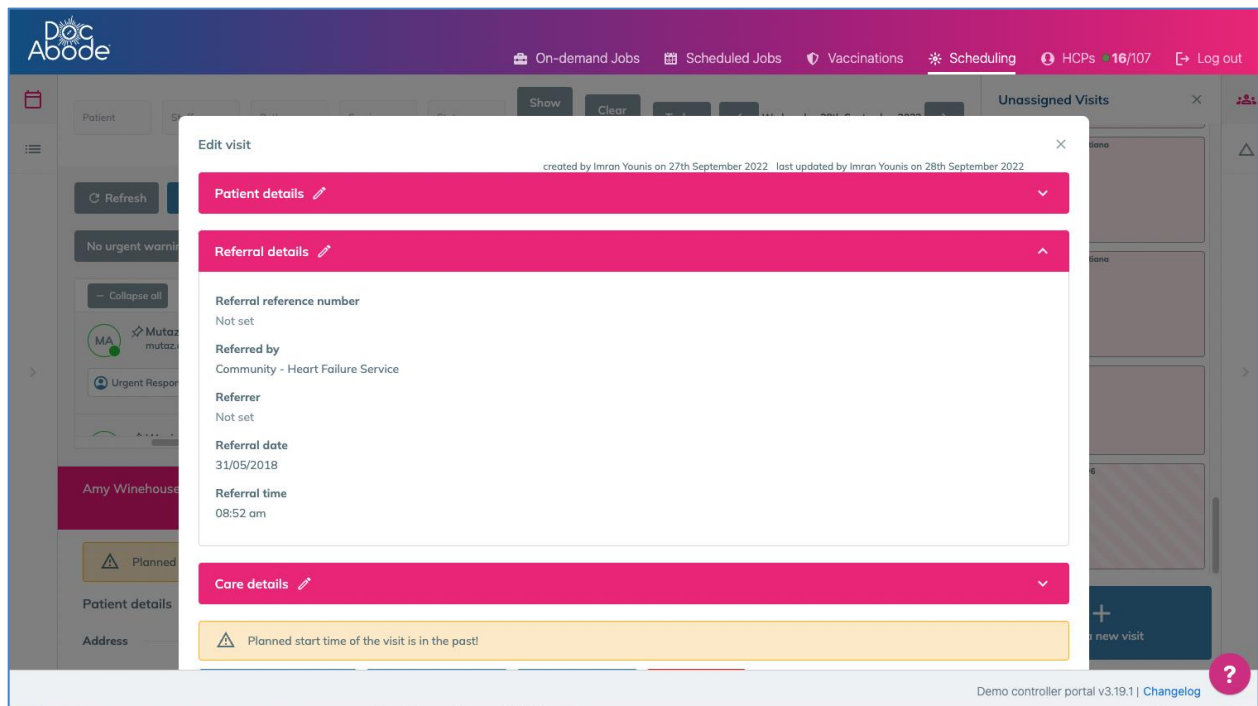
To view full details, press the action button and select *View full details*

The screenshot shows the Doc Abode Scheduling Controller 2 interface. At the top, there are navigation tabs: On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling (active), HCPs 16/107, and Log out. Below the navigation, there are filters for Patient, Staff, Pathway, Service, and Status. A date selector shows 'Wednesday 28th September 2022'. A table lists visits with columns: NHS number, Patient, Date of birth, Gender, Postcode, Pathway, Service / activity, Planned time, Duration, and Actual start time. Two visits are listed: Melody Brewer (24/04/1991, Female, NW10 0BG, CADS, 2d reablement, 01:15) and Erma Burke (08/12/1939, Female, NW9 6RZ, D2A, 01:00). Below the table, there is a section for 'Erma Burke' with details like Age (82), Date of birth (08 Dec 1939), Gender (Female), NHS number (4609555804), Service (Not set), Complexity (Non-complex), Car required (No), and # Staff required (1). A red circle highlights the 'Actions' menu for this visit, which includes options: View full details, Cancel, and Create follow-up visit.

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 screenshot shows the Doc Abode Scheduling Controller 2 interface with the 'Edit visit' modal window open. The modal has a title bar 'Edit visit' and a close button. Below the title bar, there is a section for 'Patient details' with a red circle highlighting an expand/collapse arrow. The patient details include: NHS number (5487963251), Name (Winehouse, Amy), Phone number(s) (Not set), Date of birth (01/01/2010), Gender (Female), Address line 1 (Kirk House), Address line 2 (High Street), Address line 3 (Yiewsley), Town (West Drayton), and Address. The modal also shows a section for 'Visit details' with fields for 'Planned start' and 'Planned end'.

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.