

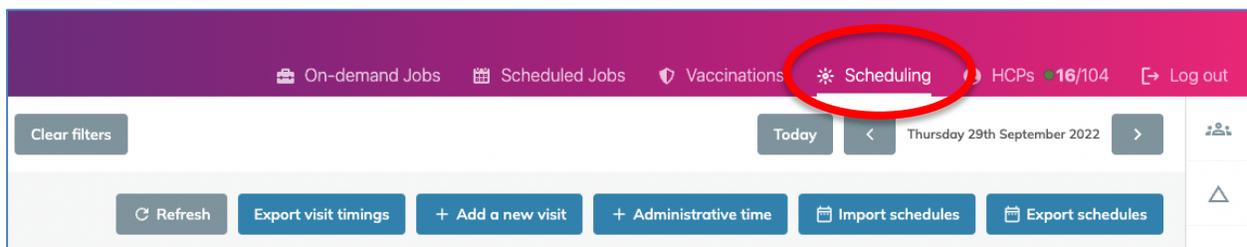
Scheduling System – Controller Functions

Adding visits

This document describes how to add visits. This can be achieved in one of three ways

- From a referral
- Via a lookup
- As a follow-up from another visit

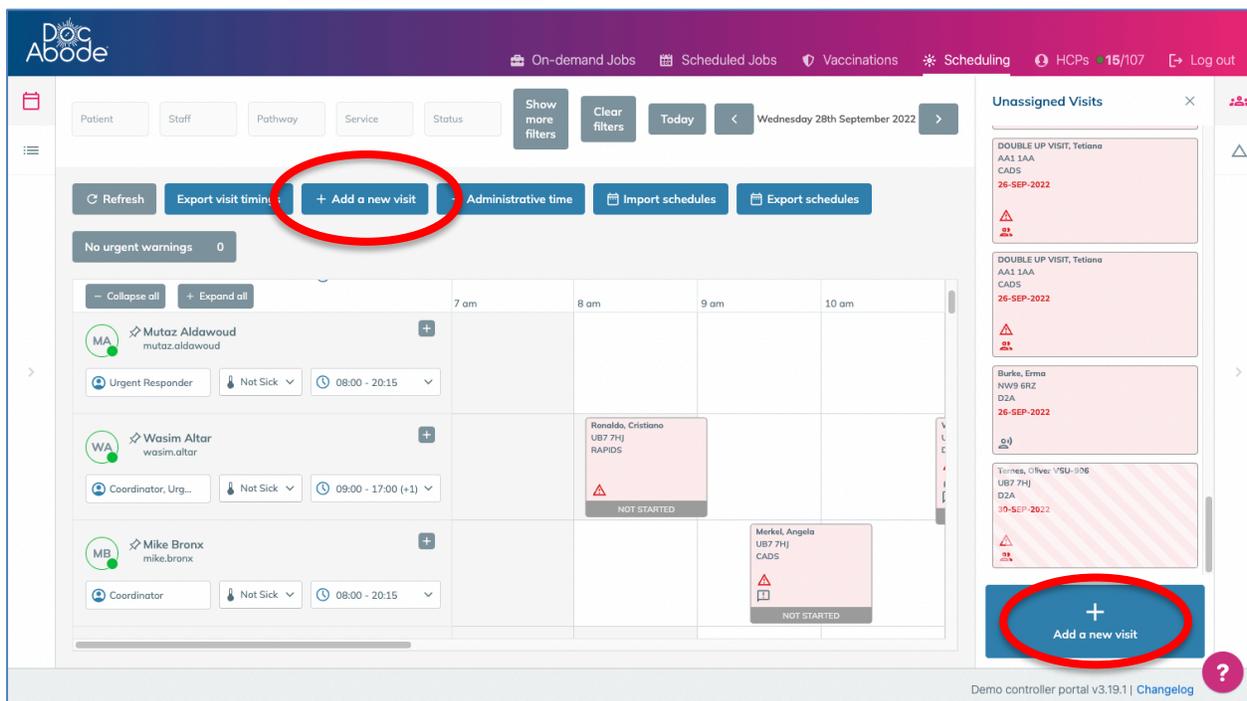
1. Log in to Doc Abode as a COD <https://controller.docabode.com/> and select the Scheduling tab



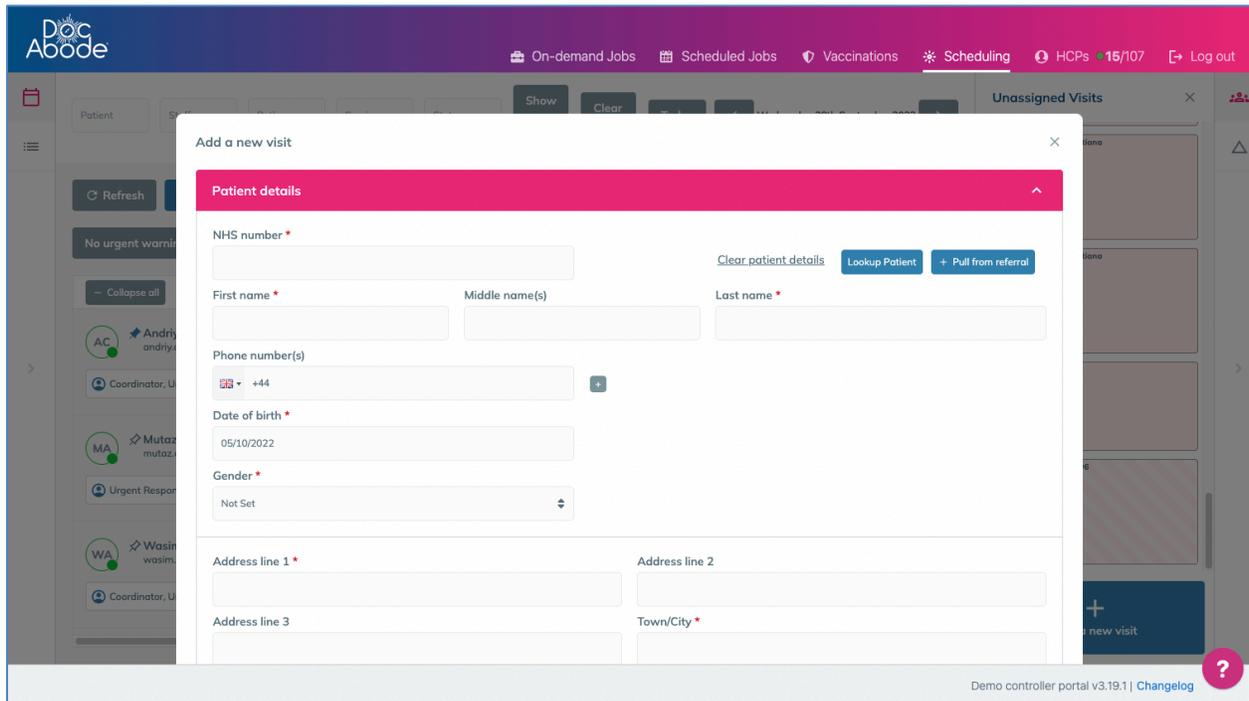
The ability to add a new visit is available from two places:

- The *Add a new visit* button on the main page, and
- The Add a new visit button at the bottom of the list of unassigned visits

These buttons are shown in the screenshot below.



When the *Add a new visit* button is pressed, the following page is displayed

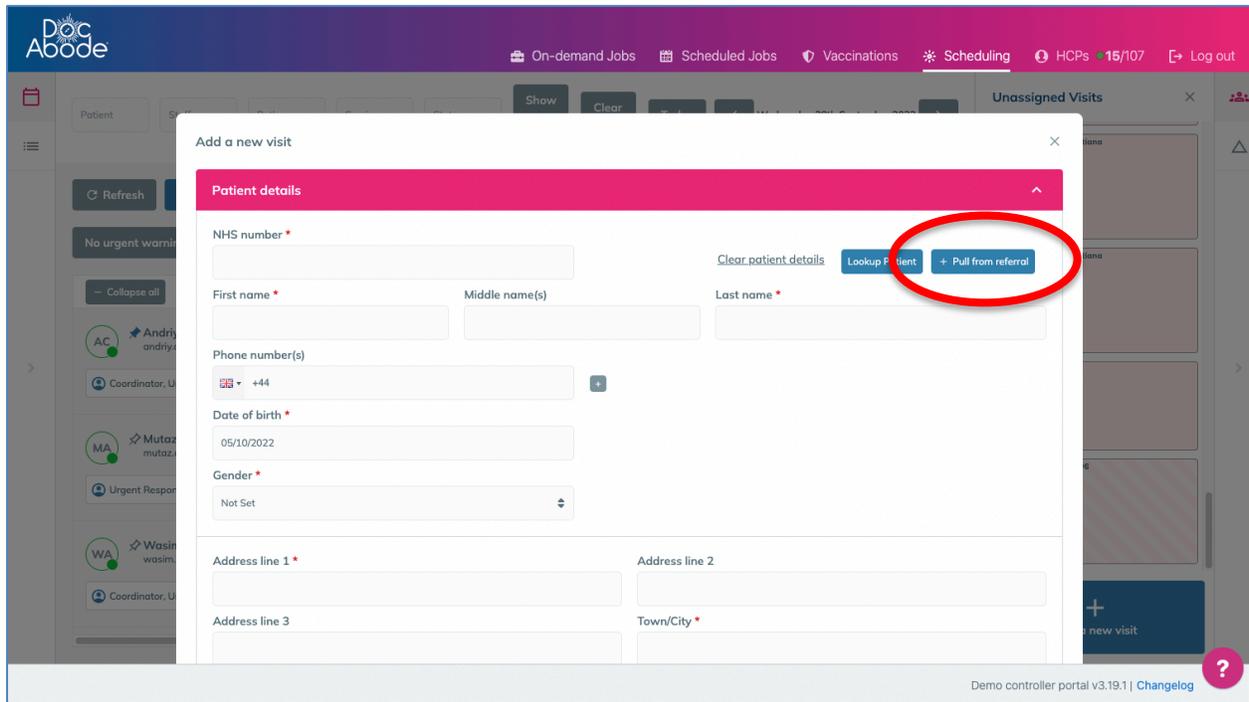


From here there are three options

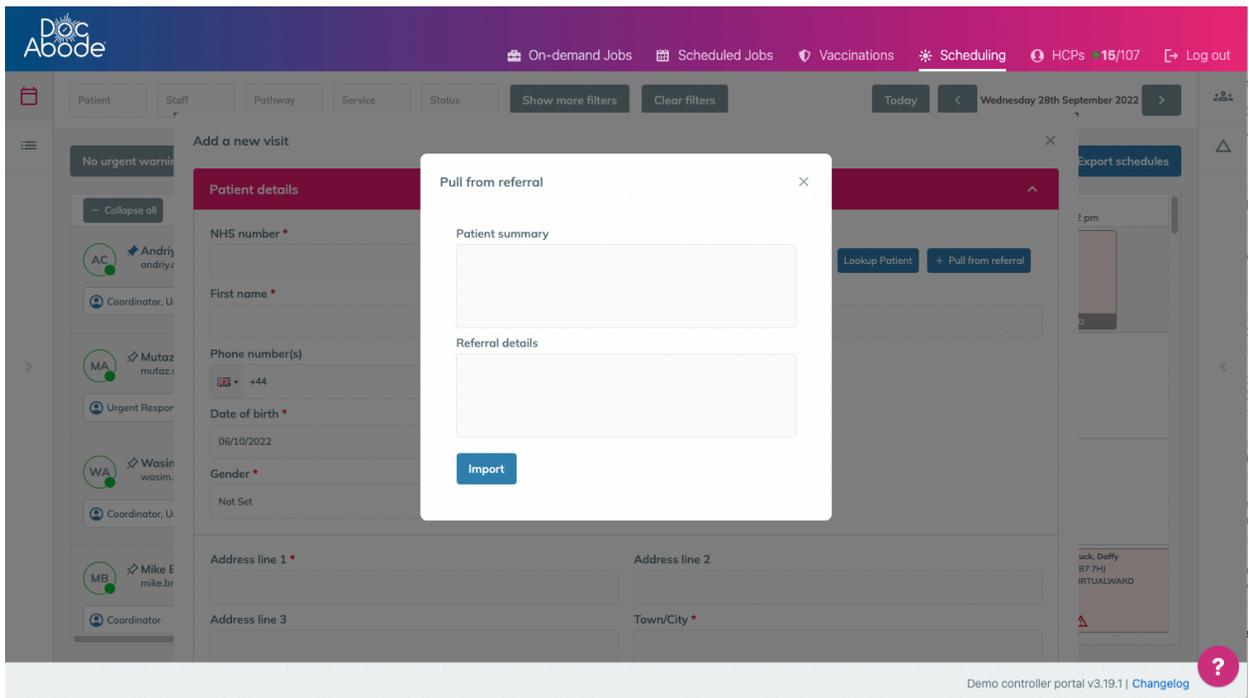
- Pulling details from a referral
- Pulling details from a lookup
- Entering all details manually

Adding a visit from a referral

Select the + Pull from referral button shown below

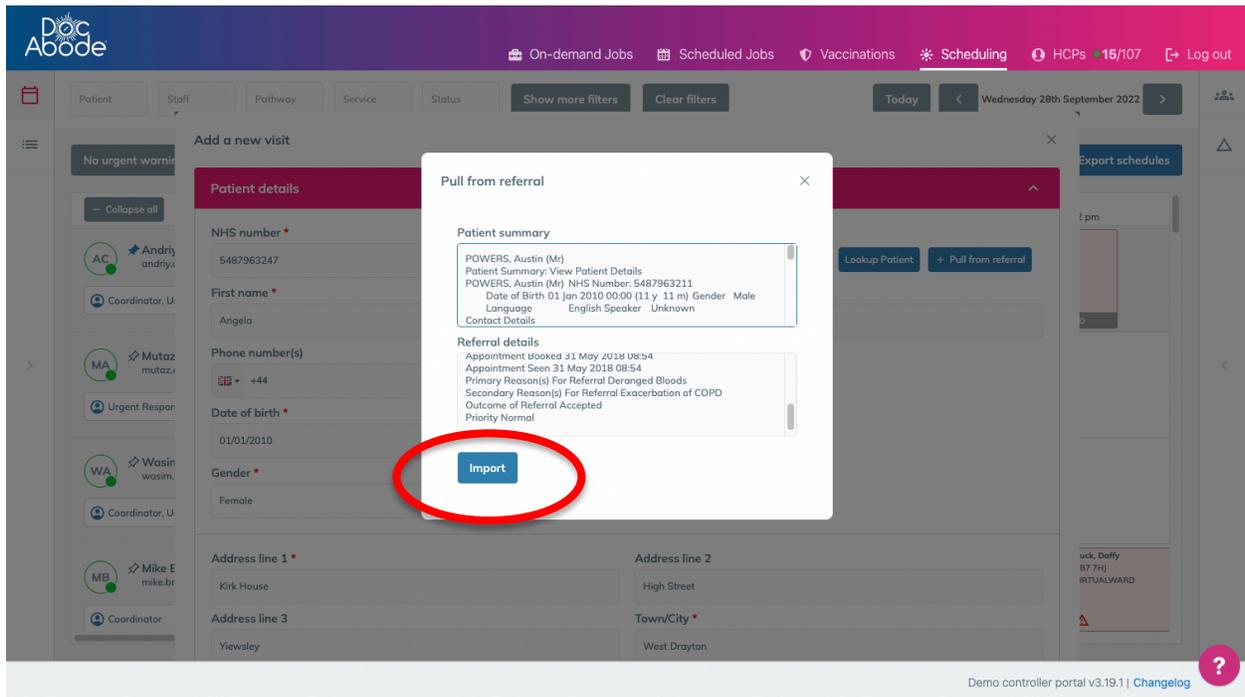


The following page will be displayed.



Patient and referral details can be pulled into Doc Abode from a screen grab of referral details from the local patient record system. Please see local instructions on how to do this, as this may vary for each Doc Abode customer.

Once details that have been obtained from the patient record system have been copied into the appropriate windows, press the *Import* button to load these in Doc Abode.



The original window will be displayed, but this time it is completed with data that has been imported

Doc Abode

On-demand Jobs | Scheduled Jobs | Vaccinations | Scheduling | HCPs 15/107 | Log out

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

Add a new visit

Patient details

NHS number *
5487963247 [Clear patient details](#) [Lookup Patient](#) [+ Pull from referral](#)

First name * Middle name(s) Last name *
Angela Merkel

Phone number(s)
+44

Date of birth *
01/01/2010

Gender *
Female

Address line 1 * Address line 2
Kirk House High Street

Address line 3 Town/City *
Viewsley West Drayton

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Scroll down to the end of the Patient details section of the form. Details about the patient can of course be amended in the meantime. By pressing on the Continue button the referral details section of the form is opened.

Doc Abode

On-demand Jobs | Scheduled Jobs | Vaccinations | Scheduling | HCPs 15/107 | Log out

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

Add a new visit

Spoken language
German

Gender of visiting staff
Search...

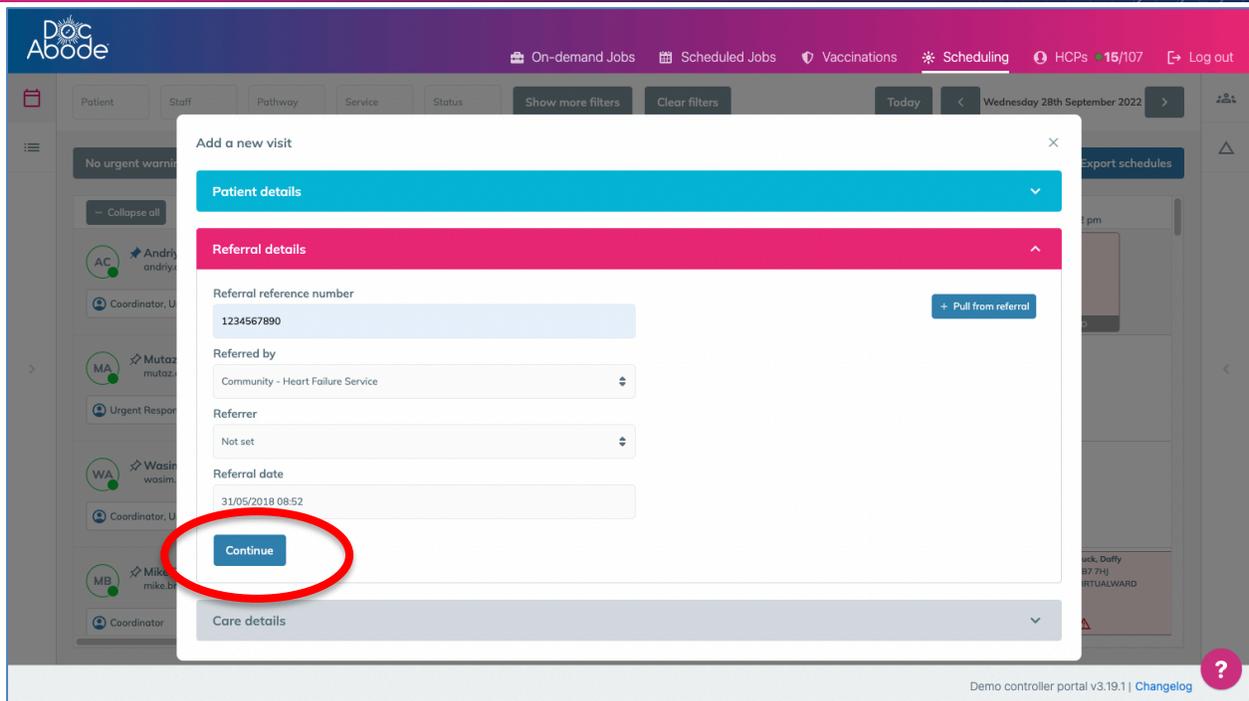
Continue

Referral details

Care details

Demco controller portal v3.19.1 | [Changelog](#) ?

Referral details will have been imported as described above.



Referral details are not mandatory but are of course useful. In particular, the information recorded here can be used to calculate clock start and stop times – the time taken from referral to visit.

Press *Continue* to get to the final section, *Care details*.

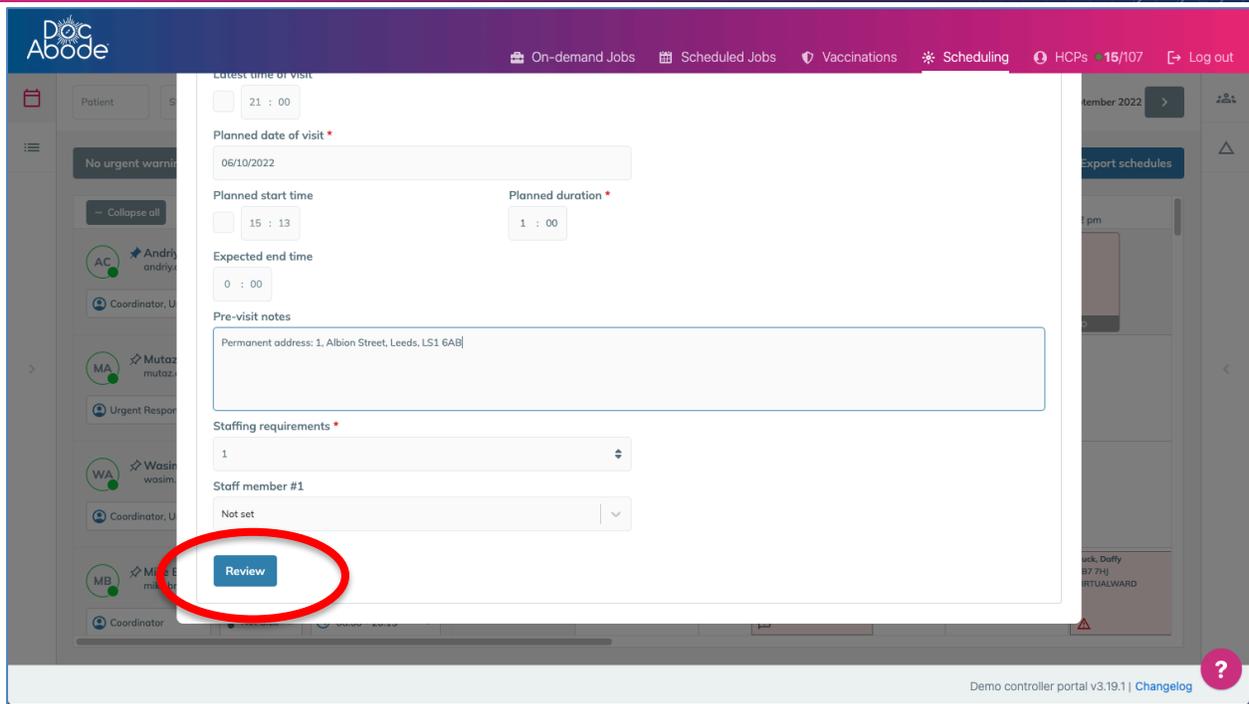
Details, where available, will have been populated from the referral loaded above. All mandatory data, marked with a red * needs to be completed before the visit can be added.

The system helps to ensure quality data is recorded by validating the NHS number, phone number and postcode are in correct UK formats.

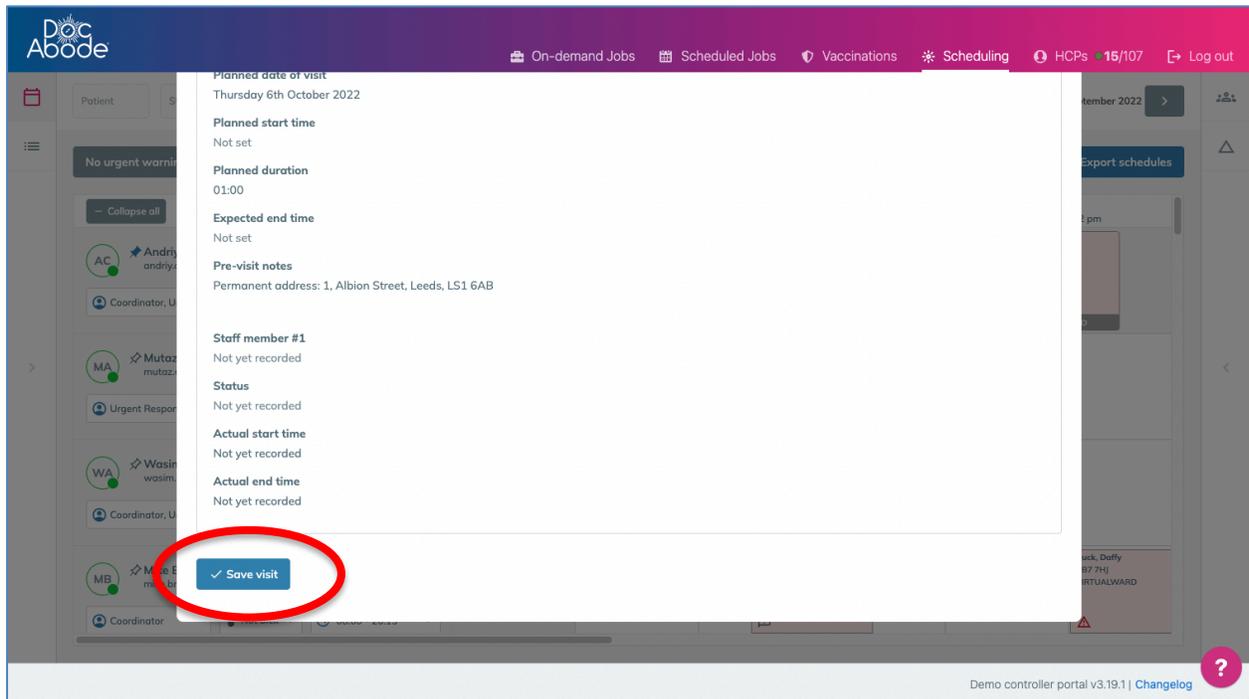
The system enables the earliest and/or latest date and time of a visit to be entered, which is useful for situations such as hospital discharges. This information is stored on the visit and the system will warn the controller and HCP if the visit time falls outside planned hours.

The *Pre-visit notes* box can be populated with a copy of the pre-assessment notes on the patient record system. It is also useful for recording any special details about access e.g. key safe number.

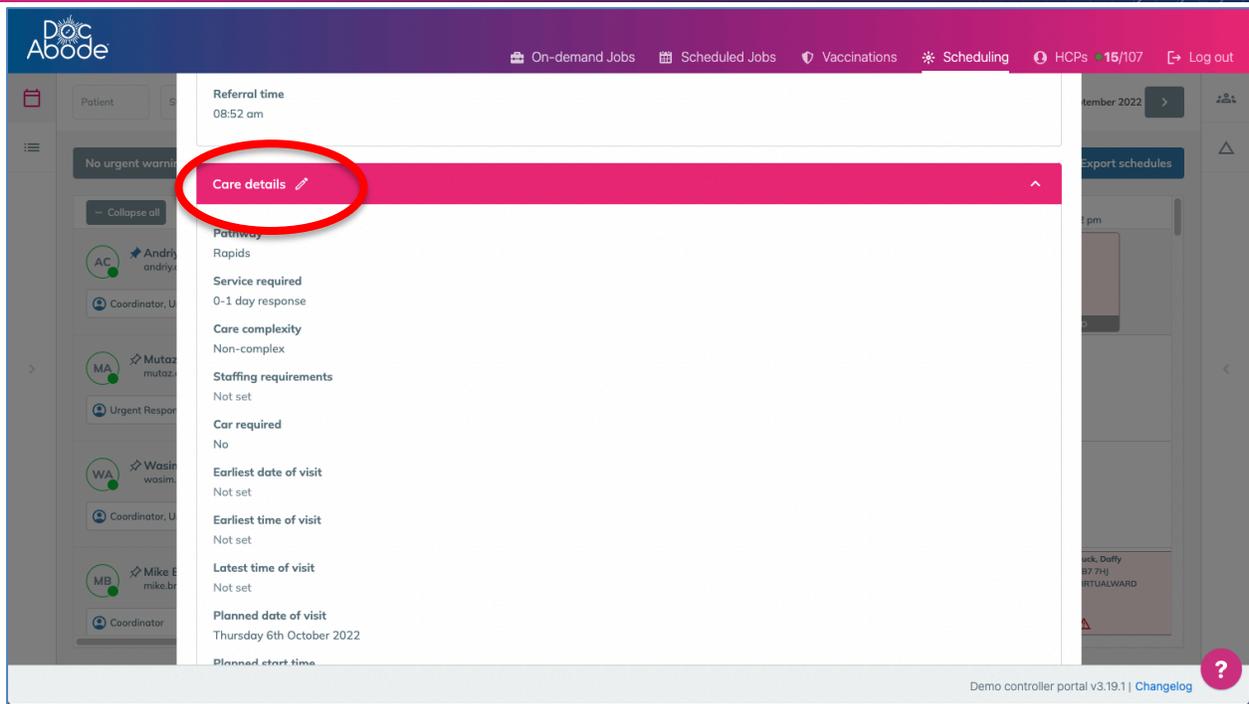
At the bottom of this section there is the opportunity to enter an HCP (or two if a double-up). If this is entered the visit will appear on the HCP(s) swim lane; if left blank the visit will be added to the *Unassigned visits* list.



Press the Review button to see all the details for that visit in a read-only form and press *Save visit* to add the visit to Doc Abode.

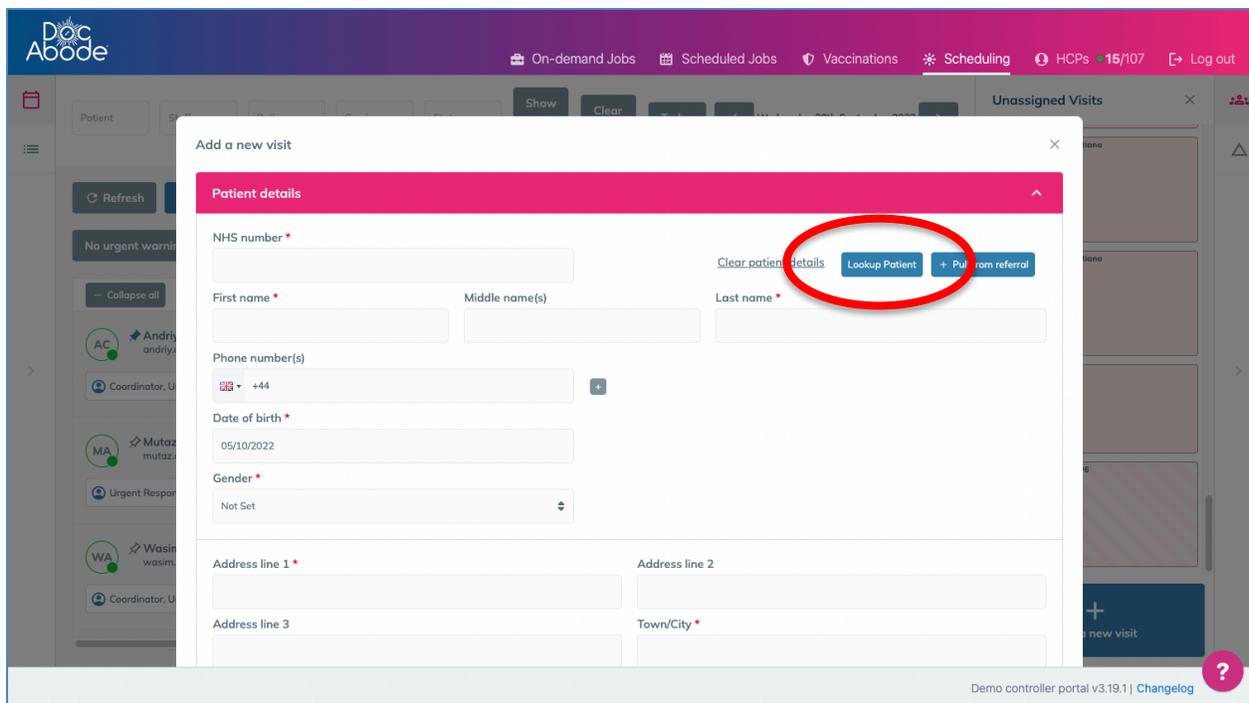


To cancel this addition, scroll to the top of the form and press the X in the top right of the form. To make changes, scroll up to the heading of the section to be changed and press on the pencil icon to enable editing. Press *Save visit* once all details are correct.

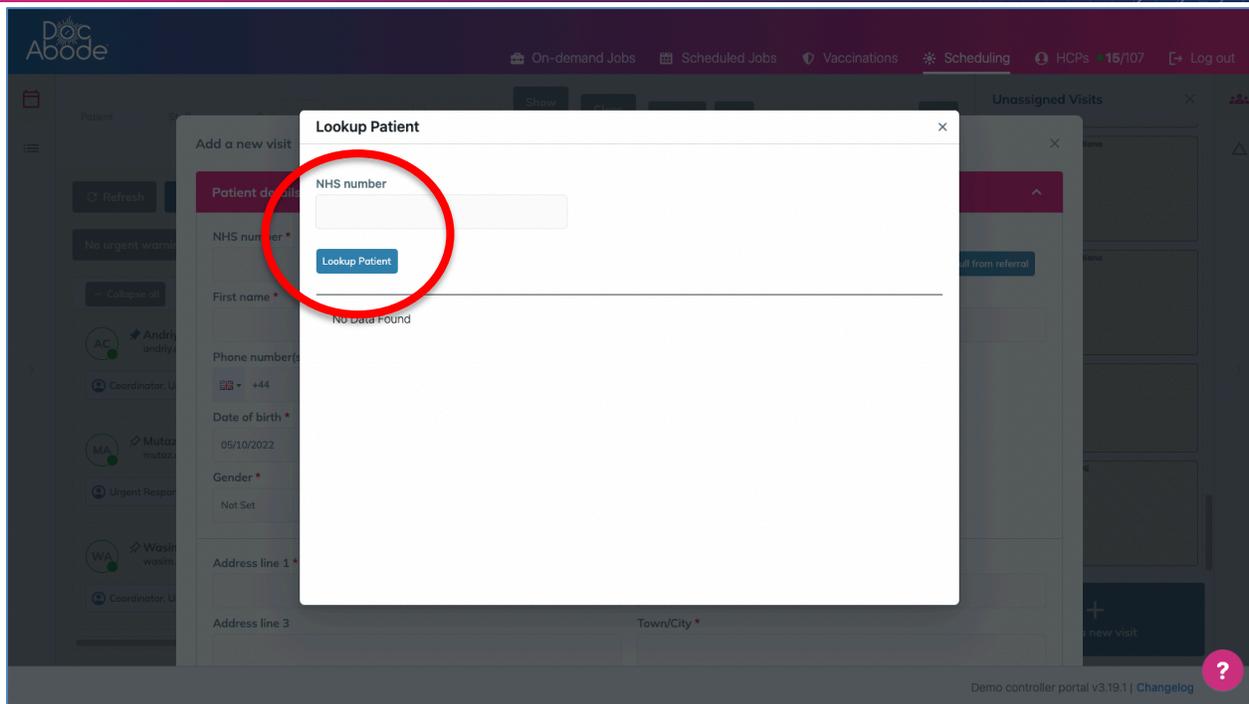


Adding a visit from a lookup

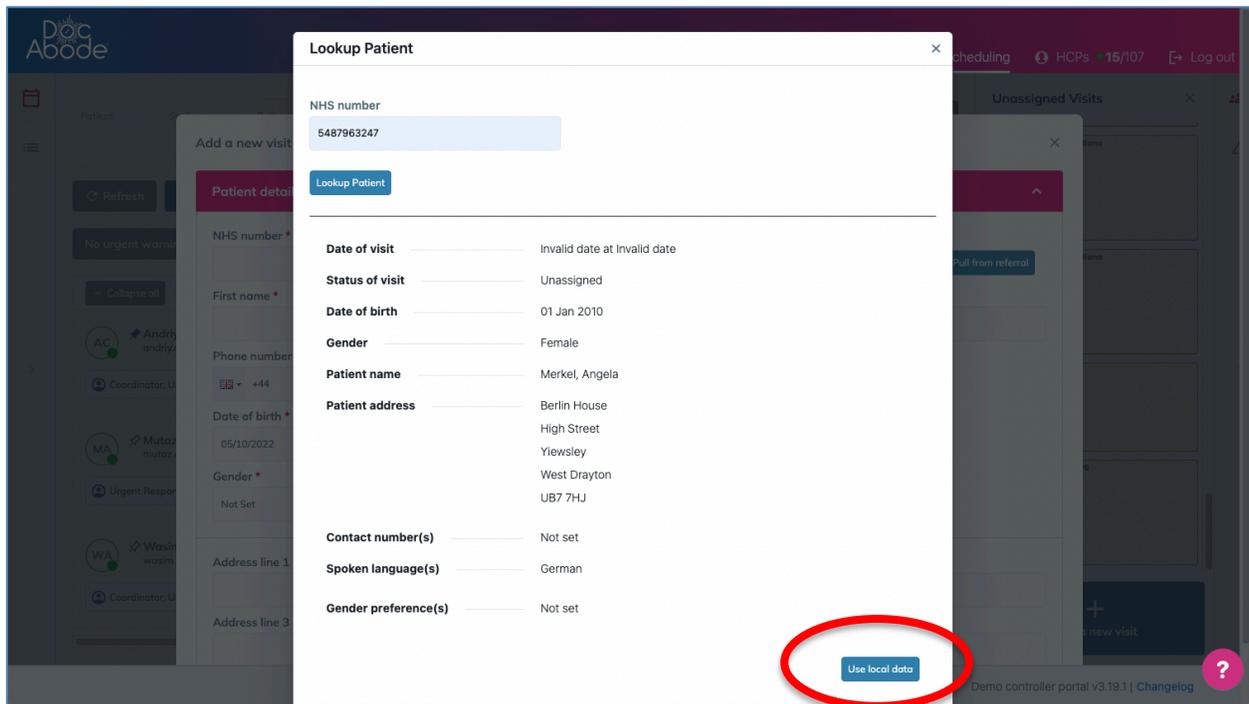
Select the *Lookup Patient button* shown below



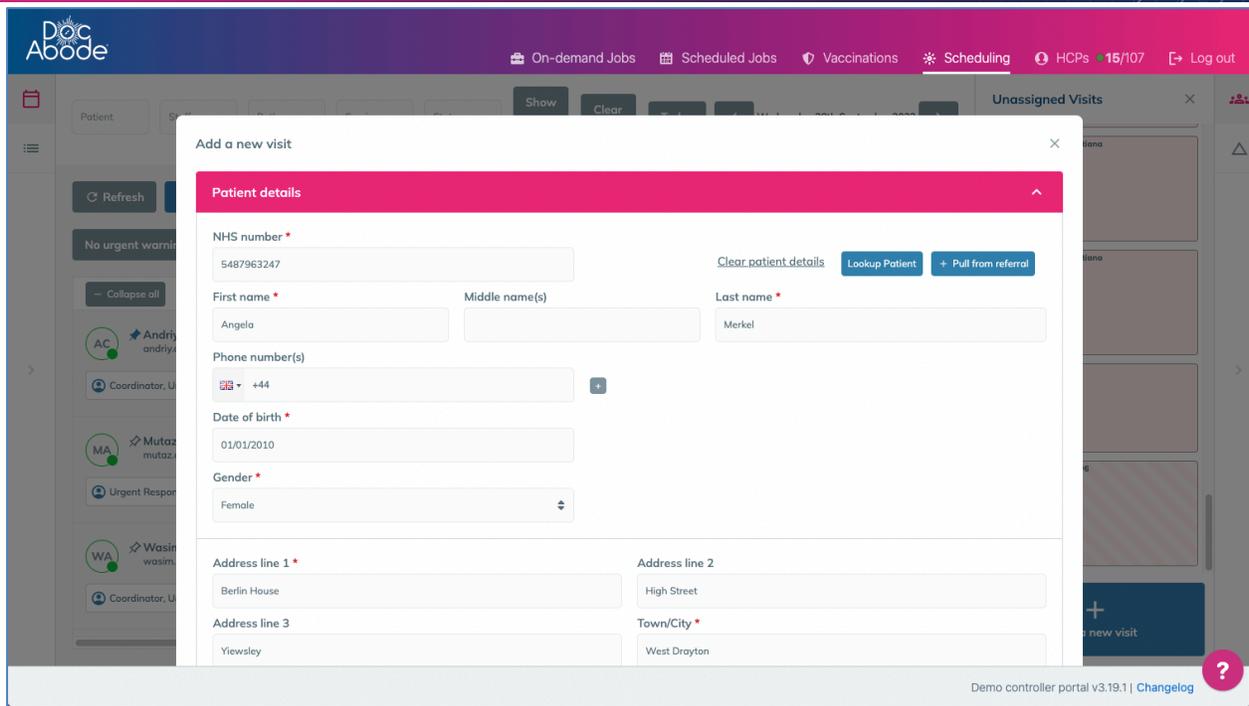
The following page will be displayed.



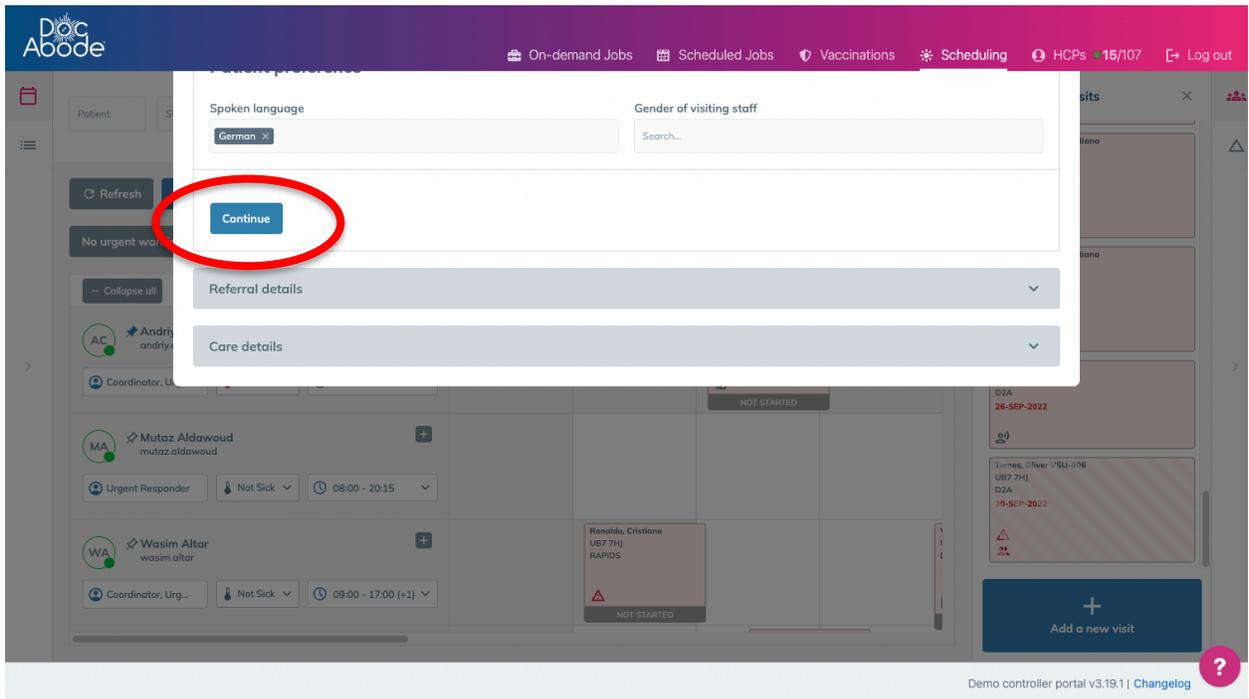
Enter the patient's NHS number, press *Lookup Patient* and the webpage will be populated with patient data.



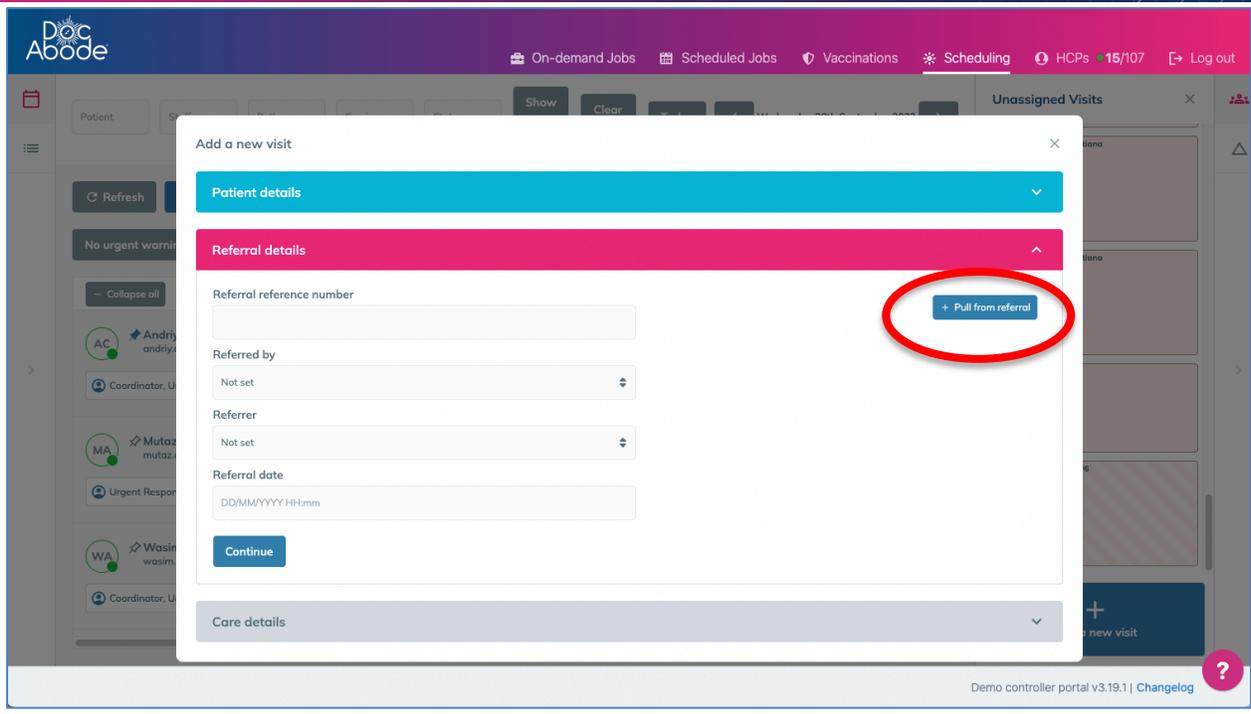
Press *Use local data* to populate the *Add a new visit* page with details about this patient.



Scroll down to the bottom of the patient details section of the visit. Details about the patient can be amended if needed. Press *Continue* to open the referral details section of the form.



Referral details can be entered manually or pulled from a screen grab of referral details from the local patient record system. Please see local instructions on how to do this.



Finally, edit the *Care details* section of the form, *Review* and then *Save visit* as described above.

Adding a visit as a follow-up

Select a visit to be followed up, either by clicking on a tile in the tile view, clicking on a row in list view or clicking on an unassigned visit.

If the visit isn't obvious, the filter options can be used to find it. See the *Viewing Visits* guide for details of how to use the filters.

Whichever way the controller gets there, the lower part of the webpage will be populated with the full details of the selected visit. The screenshot below shows the result of clicking on a row in list view

The screenshot displays the Doc Abode Scheduling Controller interface. At the top, there are navigation tabs for 'On-demand Jobs', 'Scheduled Jobs', 'Vaccinations', 'Scheduling', and 'HCPs 15/107'. Below this is a filter bar with 'Patient', 'Staff', 'Pathway', 'Service', and 'Status' filters, along with 'Show more filters' and 'Clear filters' buttons. A date selector shows 'Today' and 'Wednesday 28th September 2022'. A toolbar contains buttons for 'No urgent warnings 0', 'Refresh', 'Export visit timings', '+ Add a new visit', '+ Administrative time', 'Import schedules', and 'Export schedules'. A table lists visits with columns for NHS number, Patient, Date of birth, Gender, Postcode, Pathway, Service / activity response, Planned time, Duration, Actual start time, Actual end time / cancelled time, and Status. The selected visit is for Angela Merkel (NHS 5487963247), a 0-1 day response scheduled for 28/09/2022 at 09:25 AM. Below the table, a red circle highlights the 'Actions' button. The details section for Angela Merkel shows 'NOT STARTED' status and a warning: 'Planned start time of the visit is in the past!'. The details are organized into three columns: Patient details (Address: Kirk House, High Street, Yiewsley, West Drayton, UB7 7HJ), Visit details (Referrer: Not set, Pathway: CADS, Service: 0-1 day response), and Visit timing (Earliest date of visit: Not set, Earliest time of visit: Not set). The footer indicates 'Demo controller portal v3.19.1 | Changelog'.

A list of actions is presented when the controller presses the *Action* button. One of these is *Create follow-up visit*.

The screenshot shows the Doc Abode Scheduling Controller interface. At the top, there are navigation tabs for 'On-demand Jobs', 'Scheduled Jobs', 'Vaccinations', 'Scheduling', and 'HCPs 15/107'. Below this is a filter bar with 'Patient', 'Staff', 'Pathway', 'Service', and 'Status' filters. A table lists visits with columns for NHS number, Patient, Date of birth, Gender, Postcode, Pathway, Service / activity, Planned time, Duration, Actual start time, Actual end time / cancelled time, and Status. The visit for Angela Merkel is highlighted. Below the table, a detailed view for Angela Merkel is shown, with a red circle around the 'Actions' menu. The 'Actions' menu includes options: 'View full details', 'Cancel', 'Create follow-up visit', and 'Change status'. The 'Create follow-up visit' option is selected.

Selecting *Create follow-up visit* presents the controller with an *Add a new visit* form in which the top two sections have been copied across and is open at the *Care details* section.

The screenshot shows the 'Add a new visit' form in the Doc Abode Scheduling Controller. The form is divided into sections: 'Patient details', 'Referral details', and 'Care details'. The 'Care details' section is highlighted in pink. It includes fields for 'Pathway' (set to CADS), 'Service required' (set to Follow Up), and 'Care complexity' (set to Non-complex). There are also checkboxes for 'Transport requirements' (Car required) and 'Earliest date of visit' (DD/MM/YYYY) and 'Earliest time of visit' (7 : 00). A 'Pull from referral' button is visible next to the Pathway field.

Edit the *Care details* section of the form, *Review* and then *Save visit* as described above.