



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

| | 🚔 On-demand Jobs | 🛱 Scheduled Jobs | Vaccinations | |) HCPs 16 /104 | [→ Log out |
|---------------|------------------------|---------------------|---------------------|--------------------|------------------------|------------|
| Clear filters | | | Tod | ay < Thursdo | ay 29th September 2022 | > 224 |
| C Refresh | Export visit timings + | Add a new visit + A | Administrative time | 🖻 Import schedule: | s 🗮 Export schedul | |

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.

| Ab | óc ode | 🚔 On-demand Jobs 🛙 🖽 | Scheduled Jobs 🔹 Vaccinations | ※ Scheduling |
|----|--|--|------------------------------------|--|
| ⊟ | Patient Stoff Pathway Service Sto | Show Orean Tod Filters | ay < Wednesday 28th September 2022 | Unassigned Visits X 22 DOUBLE UP VISIT, Tetiono An1 JAA |
| | C Refresh Export visit timin: 1 + Add a new visit No urgent warnings 0 | : Administrative time 🗎 Import sch | edules 🛛 🛱 Export schedules | CADS 26-SEP-3022 |
| > | Collapse all + Expand all MAA | 7 am 8 am | 9 am 10 am | CADS 26-5EP-3022 2. Burks, Erms NWW BRZ D2A |
| | Wasim Altar Wasim Altar Coordinator, Urg Image: Not Sick ∨ Image: Not Sick ∨ Image: Not Sick ∨ | Renalds, Cristiano UB7741 RAPDS NOT-STARTED | | 26-5EP-2022 20 20 4 1 1 1 1 1 26-5EP-2022 20 1 20 1 20 1 20 1 20 20 20 20 20 20 20 20 20 20 |
| | Mike Bronx mike bronx | | Merkel, Angela US77H] CADS | Add a new visit |
| | | | | Demo controller portal v3.19.1 Changelog |





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

| Abo | oc ode | | 🚔 On-demand Je | obs 🛱 Scheduled Jobs | Vaccinations | * Scheduling Q | HCPs ●15/ 107 | |
|-----|-------------------|----------------------------|----------------|----------------------|----------------|----------------------|------------------------|-------|
| Ħ | Patient | anan Casaan Garaan G | Show | | | Unassigne | d Visits | × 2 |
| = | | Add a new visit | | | | × | tiana | |
| | C Refresh | Patient details | | | | ^ | | |
| | No urgent warnir | NHS number * | | Clogr patient | dotaile | | Gana | |
| | - Collapse all | First name * | Middle name(s) | Last name * | Lookup Patient | + Pull from referral | | |
| | AC Andriy | Phone number(s) | | | | | | |
| | Coordinator, U | ⊟∃ ▼ +44 | • | | | | | |
| | MA Mutaz | Date of birth * 05/10/2022 | | | | | | |
| | (2) Urgent Respor | Gender * | | | | | 6 | |
| | | Not Set | T | | | | | |
| | WA wasim. | Address line 1 * | | Address line 2 | | | | |
| | Coordinator, U | Address line 3 | | Town/City * | | | + a new visit | |
| | | | | | | | | - ? |
| | | | | | | Demo controller | portal v3.19.1 Chang | jelog |

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

| AB | oc ode | | 🚔 On-demand Job | os 🛗 Scheduled Jobs | Vaccinations | * Scheduling | • HCPs • 15 /107 | |
|----|--------------------|--------------------------------------|-----------------|---------------------|-------------------|----------------------|----------------------------|---------|
| Ħ | Patient St | ineral (interaction (interaction (in | Show Clear | | 1 2011 0 1 1 2022 | Unass | igned Visits | × 281 |
| := | | Add a new visit | | | | | × tiana | |
| | C Refresh | Patient details | | | | | ^ | |
| | No urgent warnir | NHS number * | | Clogr patient a | dataila | | liana | |
| | — Collapse all | First name * | Middle name(s) | Last name * | Lookup P tient | + Pull from referral | | |
| | AC Andriy | | | | | | | |
| | Coordinator, U | Phone number(s) | | | | | | |
| | | Date of birth * | | | | | | |
| | MA Mutaz mutaza | 05/10/2022 | | | | | | |
| | Urgent Resport | Gender * | A | | | | | |
| | | | | | | | | |
| | WA wasim. | Address line 1 * | | Address line 2 | | | | |
| | Coordinator, U | Address line 3 | | Town/City * | | | + | |
| | | | | | | | a new visit | |
| | | | | | | Demo cont | roller portal v3.19.1 Ch | angelog |

The following page will be displayed.

| Ab Ab | oc ode | | 🖴 On-demand Jo | bs 🛗 Scheduled Jobs | ¢ v | accinations | ☆ Scheduling | 0 нс | CPs ●15/ 107 [→ L | og out |
|----------|-----------------------|-------------------------------|--------------------------|---------------------|-----|---------------|---------------------|--------------|------------------------------------|------------------|
| Ħ | Patient Staff | Pathway Service | Status Show more filters | Clear filters | | Tode | ay < Wednes | day 28th S | eptember 2022 | :81 |
| = | No urgent warnir | Add a new visit | _ | | | | | × | Export schedules | \bigtriangleup |
| | - Collapse all | Patient details | Pull from referral | | × | | | ^ | lan la | |
| | Andrij | NHS number * | Patient summary | | | | | | | |
| | Coordinator, U | First name * | | | | Lookup Patier | + Puil from referre | | | |
| > | MA * Mutaz mutaz.e | Phone number(s) 태종 + +44 | Referral details | | | | | | | |
| | Urgent Respor | Date of birth * 06/10/2022 | | | | | | | | |
| | WA ☆ Wasin wasim. | Gender * | Import | | | | | | | |
| | Coordinator, U | Not Set | | | | | | | | |
| | MB Mike E mike.br | Address line 1 * | | Address line 2 | | | | | uck, Daffy B7 7HJ IRTUALWARD | |
| | Coordinator | Address line 3 | | Town/City * | | | | | ۵ | |
| | | | | | | | Demo cor | ntroller por | rtal v3.19.1 Changelog | ? |





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



| Abc | ode | | 🚔 On-demand Jobs 🛗 S | cheduled Jobs 🔹 🗘 Vaccination | ns 🔆 Scheduling 💽 H | ICPs ●15 /107 [→ Log of | |
|-----|--------------------|------------------------|-------------------------|--------------------------------|-----------------------------|--------------------------------|-----|
| Ħ | Patient Staff | Pathway Service Status | Show more filters Clear | filters | Today < Wednesday 28th | September 2022 | 0.1 |
| = | No urgent warnir | Add a new visit | | | × | Export schedules | 4 |
| | - Collapse all | Patient details | | | ^ | | |
| | | NHS number * | | | | 2 pm | |
| | AC Andriy | 5487963247 | | Clear patient details Lookup P | atient + Pull from referral | | |
| | Coordinator, U | First name * Midd | le name(s) | Last name * | | | |
| | | Angela | | Merkel | | | |
| | Ma AMutaz | Phone number(s) | | | | | |
| | mutaz | 513 ▼ +44 | • | | | | |
| | Urgent Response | Date of birth * | | | | | |
| | | 01/01/2010 | | | | | |
| | WA Wasin wasim. | Gender * | | | | | |
| | Coordinator, U | Female | \$ | | | | |
| | | | | | | | |
| | Mike E | Address line 1 * | Address I | ine 2 | | uck, Daffy B7 7HJ | |
| | mike.br | Kirk House | High Stre | et | | RTOALWARD | |
| | Coordinator | Address line 3 | Town/City | * | | Δ | |
| | | Yiewsley | West Dro | yton | | 6 | |
| | | | | | Demo controller p | ortal v3.19.1 Changelog | |

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.

| Ab | oc ode | | 🚔 On-demand Jobs 🛗 Scheduled Jobs 🌓 Vaccinations | 🔆 Scheduling 💽 HC | Ps €15 /107 [→ | |
|----|----------------------------|-------------------------------------|--|-------------------------------|------------------------|-------|
| ⊟ | Patient | Spoken language German × | Gender of visiting staff Search_ | | sits tiana | × :8: |
| | C Refresh | Continue | | | liong | |
| | — Collapse all | Referral details | | ~ | | |
| , | AC Andriy | Care details | | ~ | | |
| | Coordinator, U | | NOT STARTED | D2A 26-SEP+2022 | | |
| | MA Mutaz Ala mutaz.alda | lawoud 🛨 | | Citernes, Offver VSU | 906 | |
| | Urgent Responder | Not Sick V 08:00 - 20:15 V | | UB7 7HJ D2A 30-SEP-2022 | | |
| | WA Wasim Al wasim.alta | tar | Ronaldo, Cristiano U877HJ RAPIDS | 2 | | |
| | Coordinator, Urg | ▲ Not Sick ∨ ③ 09:00 - 17:00 (+1) ∨ | NOT STARTED | Ade | + I a new visit | |
| | | | | Demo controller por | tal v3.19.1 Changelo | og 🕑 |

Referral details will have been imported as described above.



| Abc | ode Inde | | | 🚔 On-demand Jobs | 🛱 Scheduled Jobs | Vaccinations | * Scheduling | • HCPs • 15/107 | |
|-----|-----------------------|----------------------------------|----------|-------------------|------------------|--------------|-------------------|------------------------------------|-----------|
| Ħ | Patient Staff | Pathway Servi | e Status | Show more filters | Clear filters | Todo | ay < Wednes | day 28th September 2022 | > 23 |
| = | No urgent warnir | Add a new visit | | | | | | × Export sched | |
| | - Collapse all | Patient details | | | | | | ~ | |
| | AC Andriy | Referral details | | | | | | ^ | |
| | Coordinator, U | Referral reference number | | | | | + Pull from refer | ral | |
| | (MA) ≫ Mutaz | Referred by | | | | | | | |
| | (2) Urgent Respon | Community - Heart Failure Servio | e | \$ | | | | | |
| | | Not set | | \$ | | | | | |
| | WA Wasin wasim. | Referral date | | | | | | | |
| | Coordinator, U | 31/05/2018 08:52 | | | | | | | |
| | MB * Mikes mike.br | Continue | | | | | | uck, Daffy B7 7HJ IRTUALWARD | |
| | Coordinator | Care details | | | | | | ~ | |
| | | | | | | | Demo cor | ntroller portal v3.19.1 Ch | angelog ? |

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.



| Ab | oc ode | | 🚔 On-demand Jobs | Scheduled Jobs | Vaccinations | 🔆 Scheduling | |
|----|------------------------|---|--------------------|----------------|--------------|--------------|-------------------------------------|
| Ħ | Patient | 21 : 00 | | | | | tember 2022 > 😤 |
| := | | Planned date of visit * | | | | | |
| | No urgent warnir | 06/10/2022 | | | | | Export schedules |
| | - Collapse all | Planned start time | Planned duration * | | | | ? pm |
| | AC * Andriy andriya | Expected end time | | | | | |
| | Coordinator, U | Pre-visit notes | | | | | |
| | MA Mutaz mutaza | Permanent address: 1, Albion Street, Leeds, LS1 6AB | | | | | < |
| | Corgent Respor | Staffing requirements * | | | | | |
| | → Wasin | 1 | \$ | | | | |
| | WA wasim. | Staff member #1 | | | | | |
| | Coordinator, U | Not set | ~ | | | | |
| | MB Mi SE mik lor | Review | | | | | ack, Daffy 87.7HJ IRTUALWARD |
| | Coordinator | | | μ | | | |
| | | | | | | Demo co | ntroller portal v3.19.1 Changelog |

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.

| Ab | oc ode | | 🚔 On-demand Jobs | 留 Scheduled Jobs | Vaccinations | ☆ Scheduling | O HCPs ■15/107 [→ Log out |
|----|------------------------------------|---|------------------|------------------|--------------|--------------|-------------------------------------|
| Ħ | Patient | Planned date of visit Thursday 6th October 2022 | | | | | tember 2022 > #84 |
| | | Planned start time Not set | | | | | |
| | No urgent warnin — Collapse all | Planned duration 01:00 Expected end time | | | | | Export schedules |
| | AC Andrig andriga | Not set Pre-visit notes Permanent address: 1, Albian Street, Leeds, LS1 6AB | | | | | |
| > | MA Mutaz mutaza | Staff member #1 Not yet recorded Status Not yet recorded | | | | | < |
| | Wasin wasim. | Actual start time Not yet recorded Actual end time Not yet recorded | | | | | |
| | MB M & E mitubr | Save visit | | لنب | | | uck, Deffy 97 74j RTUALWARD |
| | | | | | | Demo cor | ntroller portal v3.19.1 Changelog |

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.





 (\neg)

Adding a visit from a lookup

Select the Lookup Patient button shown below

| Ab | ode ode | | 🖴 On-demand Jobs 🛙 🖽 | Scheduled Jobs 🔹 🗘 Vaccination | s 🔆 Scheduling 💽 HCPs • | 15 /107 [→ Log out |
|----|--------------------|-----------------------------|----------------------|--------------------------------|---------------------------|---------------------------|
| Ħ | Patient | anal (Manua) (Manua) (Manua | Show Clear - | | Unassigned Visits | × 224 |
| = | | Add a new visit | | | × tiana | |
| | C' Refresh | Patient details | | | ^ | |
| | No urgent warnir | NHS number * | | Clear patien details Lookup P | atient + Pul rom referral | |
| | - Collapse all | First name * Middl | e name(s) | Last name * | | |
| | AC Andriy | Phone number(s) | | | | , |
| | Coordinator, U | <u>}</u> +44 | ٠ | | | |
| | MA & Mutaz | 05/10/2022 | | | | |
| | mutaza | Gender * | | | 6 | |
| | Urgent Respor | Not Set | \$ | | | |
| | WA Wasin wasim. | Address line 1 * | Address | line 2 | | |
| | Coordinator, U | | | | | |
| | | Address line 3 | Town/C | ty * | i nev | w visit |
| | | | | | Demo controller portal v3 | .19.1 Changelog |

The following page will be displayed.



| Abc | ic ide | | | | | | |
|-----|------------------|-------------------------------|------|--------|-------------------|-------------------------|----------|
| | | | Show | | Unassig | | × 224 |
| | | Lookup Patient | | | × | × tiana | |
| | C Refresh | Patient de cils NHS number | | | ^ | | |
| | No urgent warnin | NHS num er * | | | ull from referral | tiana | |
| | | First name * No Data Found | | | - | | |
| | AC andrig | Phone number(s | | | | | |
| | Coordinator, U | <u> 113</u> + 44 | | | | | |
| | (MA) ☆ Mutaz | Date of birth * 05/10/2022 | | | | | |
| | Urgent Respon | Gender * | | | | 1 | |
| | | Not Set | | | | | |
| | WA Wasin wasin. | Address line 1 * | | | | | |
| | Coordinator, U | | | | | + | |
| | _ | Address line 3 | | City * | | new visit | |
| | | | | | | er portal v3.19.1 Cha | ngelog ? |

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

| , P | Óζ | | | | | | |
|-------|-------------------|-----------------|-------------------------------|------------------------------|--------------------|-----------------------|---------|
| Abode | | | Lookup Patient | | × cheduling 🛛 🛛 H | | |
| 8 | | | NHS number | | Unassigned | | × 22 |
| := | | Add a new visit | 5487963247 | | × | tiona | |
| | C Refresh | Patient detai | Lookup Patient | | ^ | | |
| | No urgent warnir | NHS number * | Date of visit | Invalid date at Invalid date | Pull from referral | tiana | |
| | | First name * | Status of visit Date of birth | Unassigned 01 Jan 2010 | | | |
| | AC Andris | Phone number | Gender | Female | | | |
| | Coordinator, U | 215 + +44 | Patient name | Merkel, Angela | | | |
| | | Date of birth * | Patient address | Berlin House | | | |
| | MA Mutaz | 05/10/2022 | | High Street Yiewsley | | | |
| | | Gender * | | West Drayton | | 6 | |
| | (2) Urgent Respor | Not Set | | UB7 7HJ | | | |
| | → Wasin | | Contact number(s) | Not set | | | |
| | | Address line 1 | Spoken language(s) | German | | | |
| | Coordinator, U | Address line 3 | Gender preference(s) | Not set | | + 1 new visit | |
| | | | | Use local data | Demo controller po | ortal v3.19.1 Chang | gelog ? |

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



| Patient Show Clear Unassigned Visits Add a new visit × Patient details NHS number * 6487963247 First name * Middle name(s) Last name * Andria Phone number(s) Effer + 44 01012010 01012010 Gender * Fernale Wide # to in the intervent | godi |
|--|------|
| Add a new sit C Refresh NHS number* 5487963247 First name* Middle name(s) Last name* Angelo Phone number(s) Bit+ 44 Octor of birth* 01012010 Gender* Finale Phone | 241 |
| Patient details No urgent wardt • Ndf number • • Sd87963247 • Endee • Middle name(s) • Last name • • Middle name(s) • Last name • • Middle name(s) • Constructore • Ponen number(s) • ende • Outgent Responder • Outgent Responder • Ungent Responder | |
| No urgent word Image: Image: < | |
| S487963247 Clear patient details Last name* Middle name(s) Last | |
| Collapse all First name* Angela Phone number(s) Phone number(s) Obte of birth* Obte of birth* Obte of birth* Outgent Respondence Penole With X Wasin Angela Phone number(s) Phone number(s) Conditionation Conditionation Phone number(s) Previous Phone number(s) Conditionation Phone number(s) Conditionation Previous Phone number(s) Conditionation Phone number(s) Conditionation Phone number(s) Conditionation Conditionation Phone number(s) Conditionation Conditionation Phone number(s) Penole </td <td></td> | |
| Angela Merkel Angela Merkel Phone number(s) Image: Phone number(s) | |
| Phone number(s) @ Coordinater, I @ Coordinater, I @ Urgent Respont @ Urgent Respont @ Wasin | |
| • Coordinator, U • Mutaz • Mutaz • Mutaz • Urgent Respon • Urgent Respon • Wasin • Wasin • Wasin • Wasin • Wasin • Wasin • Mutaz • Mutaz | |
| Image: Second secon | |
| Windows 0101/2010 Ourgent Respondence Gender* Female Control | |
| Gender* Female Female | |
| Female | |
| (WA) & Wasin | |
| | |
| Address line 1 Address line 2 | |
| Coordinator, U High Street | |
| Address line 3 Town/City * | |
| Yiewsley West Drayton | 2 |

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.

| Ab | oc ode | | 🚔 On-demand Jobs 🛗 Scheduled Jobs 📢 | 🕽 Vaccinations 🌸 Scheduling 💽 HC | Ps ●15 /107 [→ Log out |
|----------|---------------------------|----------------------------------|---|--|-------------------------------|
| ⊟ | Patient | Spoken language German × | Gender of visiting staff Search | | sits × 22 |
| | C Refresh | Continue | | | iana |
| | - Collapse all | Referral details | | ~ | |
| | AC Andriy | Care details | | ~ | |
| | Coordinator, U | | NOT STARTED | D2A 26-SEP-2022 | |
| | MA Mutaz Ala | lawoud 🛨 | | 21 | |
| | Urgent Responder | Not Sick 🗸 🔇 08:00 - 20:15 🗸 | | Ternes, Offver VSU- U87 7Hj D2A 30-SEP-2022 | 906 |
| | WA Wasim Al wasim.alta | tar 🔳 | Ronaldo, Cristiano UB7 7HJ RAPIDS | | |
| | Coordinator, Urg | Not Sick v 309.00 - 17.00 (+1) v | NOF STANTED | Ado | + I a new visit |
| | | | | Demo controller po | tal v3.19.1 Changelog |

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

| Abode | | | | | | | | | | | | | |
|--|--|-------------------------------------|------------------|---------------|------------------|------------------|---------------------|---------------------------|--------------------------|----------------------|-------------------------------------|---------------|-----|
| Ħ | Patient | Staff Pathway | Service | Status | Sł | now more filter: | s Clear filters | | | Today < | Wednesday 28th September | 2022 > | :8: |
| := | No urgent warnings 0 C Refresh Export visit timings + Add a new visit + Administrative time 🛱 Import schedules 🛱 Export schedu | | | | | | | | schedules | | | | |
| | NHS number | Patient | Date of birth | Gender | Postcode | Pathway | Service / activity | Planned time | Duration | Actual start time | Actual end time / cancelled time | Stat | |
| | 5487963240 | Craig Layton | 01/01/2010 | Male | UB7 7HJ | D2A | 0-1 day response | 28/09/2022 09:05 AM | 01:00 | | | Anc | |
| | 5487963247 | Angela Merkel | 01/01/2010 | Female | UB7 7HJ | CADS | 0-1 day response | 28/09/2022 09:25 AM | 01:00 | | | Mik | |
| > | 5487963251 | Amv Winehouse | 01/01/2010 | Female | UB7 7HI | D2A | 0-1 day | 28/09/2022 | 01:00 | | | Wa | < |
| Angela Merkel NOT STARTED / C v Actions × created by Inran Younis on 27th September 2022 | | | | | | | | X sber 20 ⁿ | | | | | |
| A Planned start time of the visit is in the past! | | | | | | | | | | | | | |
| | Patient detai | ils | Vi | Visit details | | | | | Visit timing | | | | |
| | Address Kirk House High Street | | | Re | eferrer | Not se | t | | Earliest da of visit | r te Not | set | | |
| | | Yiewsley West Drayton UB7 7HJ | | Po | athway ervice | CADS 0-1 do | ıy response | | Earliest tin of visit | ne Not | set | | |
| | | | | | | | | | | C | Demo controller portal v3.19 | 1 Changelog | U |

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



| | Patient | Staff | Service | Status | SH | ow more filter | Clear filters | | | Today | Wednesday 28th Sentember | 2022 |
|--|-----------------|---------------------------|------------------|-----------|-------------|----------------|---------------------|------------------------|--------------------------|----------------------|-------------------------------------|------------|
| | Putteric | Stan | Service | Stutus | | low more mere | Clear niters | | | | Wednesday 2001 September | |
| | No urgent wa | rnings 0 | | C Refresh | Export v | isit timings | + Add a new visit | + Admin | istrative time | 🛱 Import s | 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 | Stai |
| | 5487963240 | Craig Layton | 01/01/2010 | Male | UB7 7HJ | D2A | 0-1 day response | 28/09/2022 09:05 AM | 01:00 | | | Anc |
| | 5487963247 | Angela Merkel | 01/01/2010 | Female | UB7 7HJ | CADS | 0-1 day response | 28/09/2022 09:25 AM | 01:00 | | | Mik |
| | 5487963251 | Amv Winehouse | 01/01/2010 | Female | UB7 7HI | D2A | 0-1 day | 28/09/2022 | 01:00 | | | Wa |
| Angela Merkel NOT STARTED C C Created by Invan Younis on 27th September 2022 last updated if on Youris View full details | | | | | | | | | × tails | | | |
| A Planned start time of the visit is in the past! | | | | | | | | | | | Create follo | w-up visit |
| | Patient details | | | | sit details | | | Visit timin | g | Change sta | tus | |
| | Address | Kirk House High Street | | R | eferrer | Not se | t | | Earliest dat of visit | te Not | set | |
| | | Yiewsley | | Po | thway | CADS | | | | | | |

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.

| AD | oc ode | | 🚔 On-demand Jobs 🛛 🛱 Scheduled Job | os ♥ Vaccinations 🔆 Scheduling ❶ HCPs ■15/107 [→ Log out |
|----|------------------|------------------------|------------------------------------|--|
| Ħ | Patient Staff | Pathway Service Status | Show more filters Clear filters | Today < Wednesday 28th September 2022 > |
| = | No urgent warnir | Add a new visit | | × Export schedules |
| | NHS number P | Patient details | | / Star |
| | | Referral details | | × |
| | 5487963240 C | Care details | | Anc |
| | 5487963247 A | Pathway * | | Mik ⁰ |
| | 5487963251 A | CADS | \$ | + Pull from referral Wa |
| | | Service required * | | |
| | Angela Merkel | Follow Up | \$ | |
| | | Care complexity * | | full details |
| | A Planned | Non-complex | • | te follow-up visit |
| | Patient details | Car required | | ige status |
| | Address | Earliest date of visit | Earliest time of visit | |
| | | DD/MM/YYYY | 7 : 00 | |
| | | Latest time of visit | | |
| | | | | Demo controller portal v3.19.1 Changelog |

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