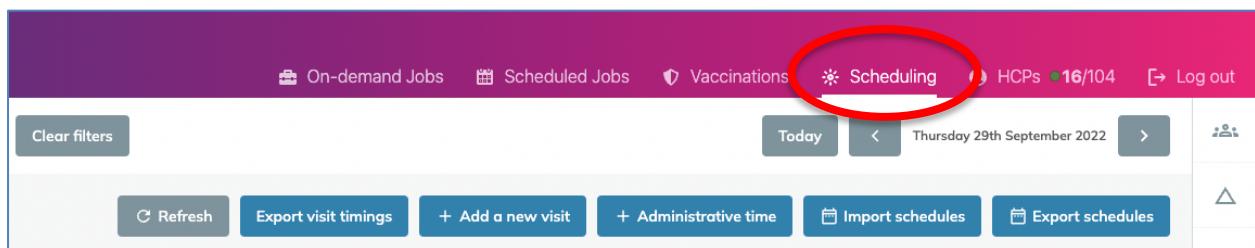# Scheduling System – Controller Functions

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 on https://controller.docabode.com/ and select the Scheduling tab

Visit details are presented in three sections
1. Patient details
2. Referral details
3. Visit details

There are many options for adding a visit and depending on the option selected there will be streamlined ways of populating the patient details and referral details sections. Visit details will always need to be entered manually.

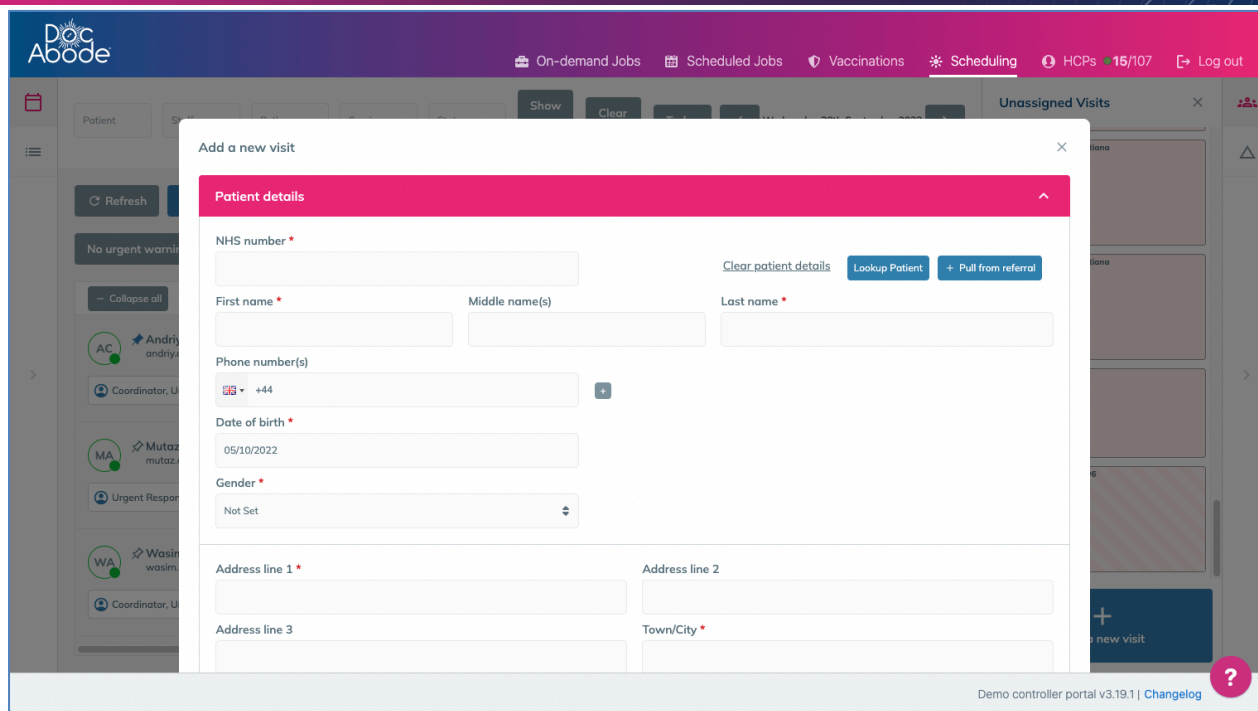The ability to add a new visit is available from three places:
- The *Add a new visit* button on the main page
- The *Add a new visit* button at the bottom of the list of unassigned visits
- The *Quick actions* menu on the patient list view

These buttons are shown in the screenshot below.

When the *Add a new visit* button is pressed the following page is displayed, to enable entry of the patient details.

Note that when the *Add visit* option is selected from the patient list, this first section is skipped because the patient details are known
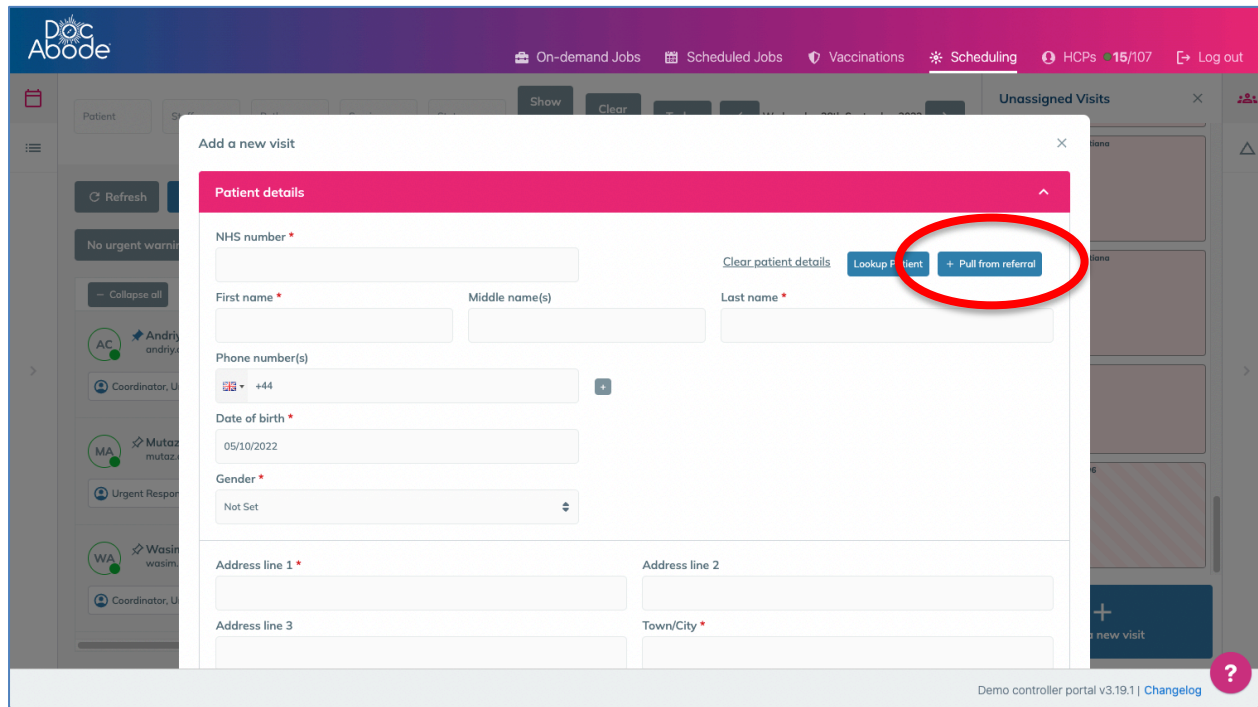
When the *Add a new visit* button is pressed, there are three options

- 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.
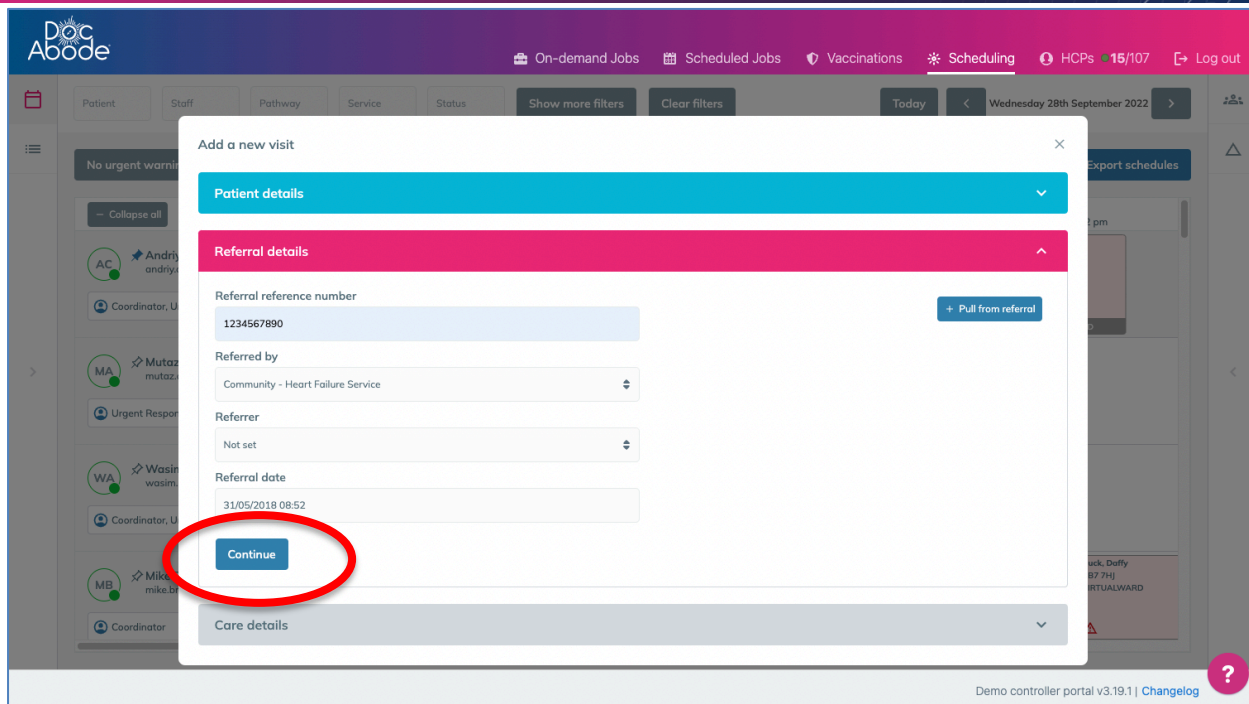
Once details that have been obtained from the patient record system have been copied into the appropriate windows, press the *Import* button to load these in Doc Abode.
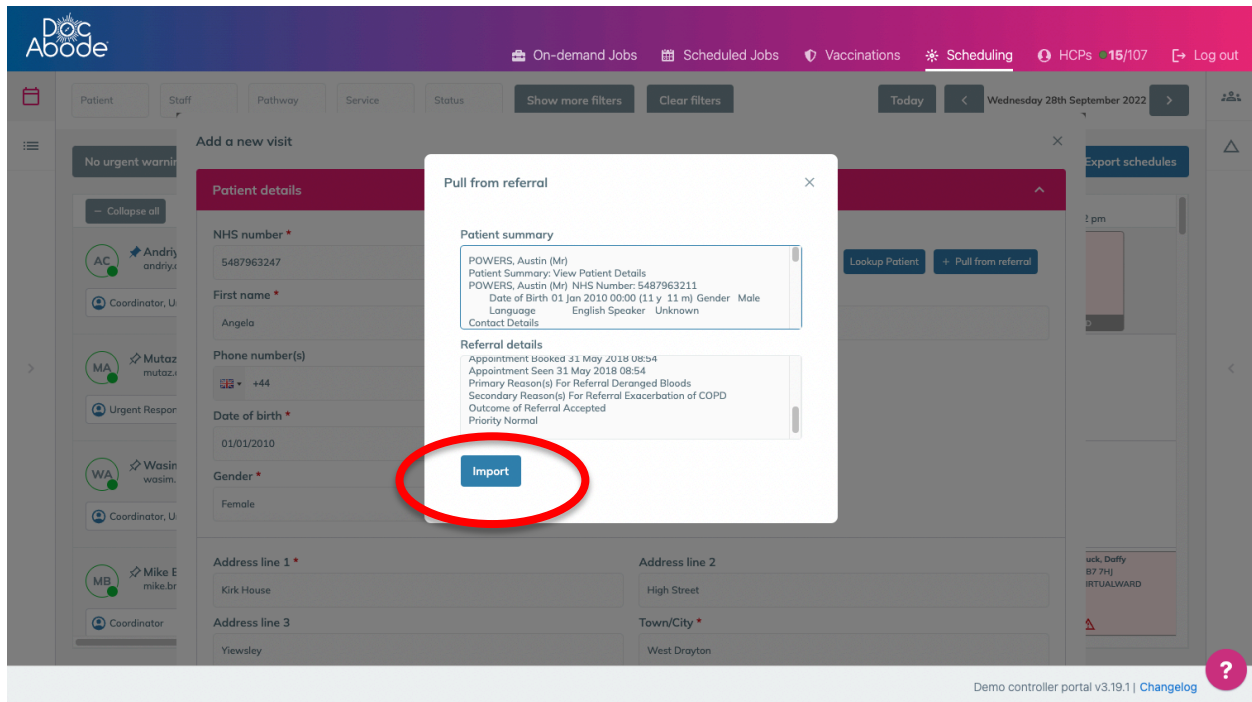
The original window will be displayed, but this time it is completed with data that has been imported

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.

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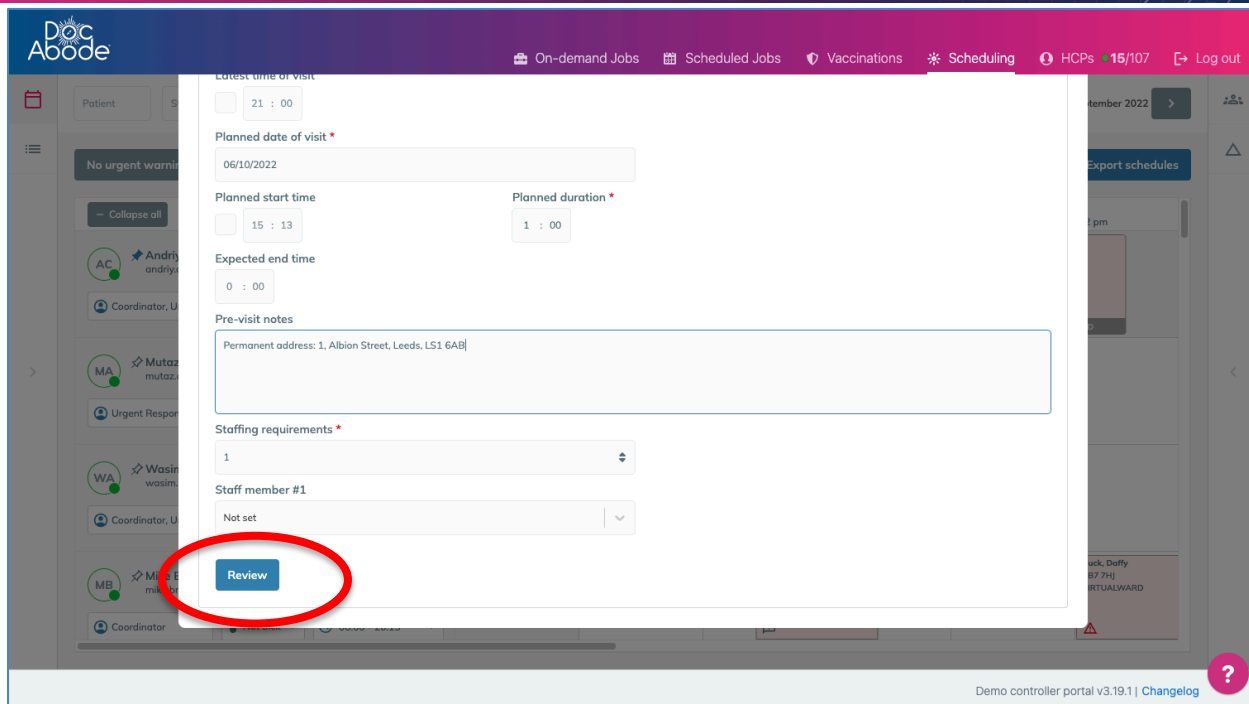
The system helps to ensure quality data is recorded by validating the NHS number, phone number and postcode are in correct UK formats.

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.

The drop-down list of HCPs will show availability, to enable the controller to easily identify a person that is able to fulfill the visit.
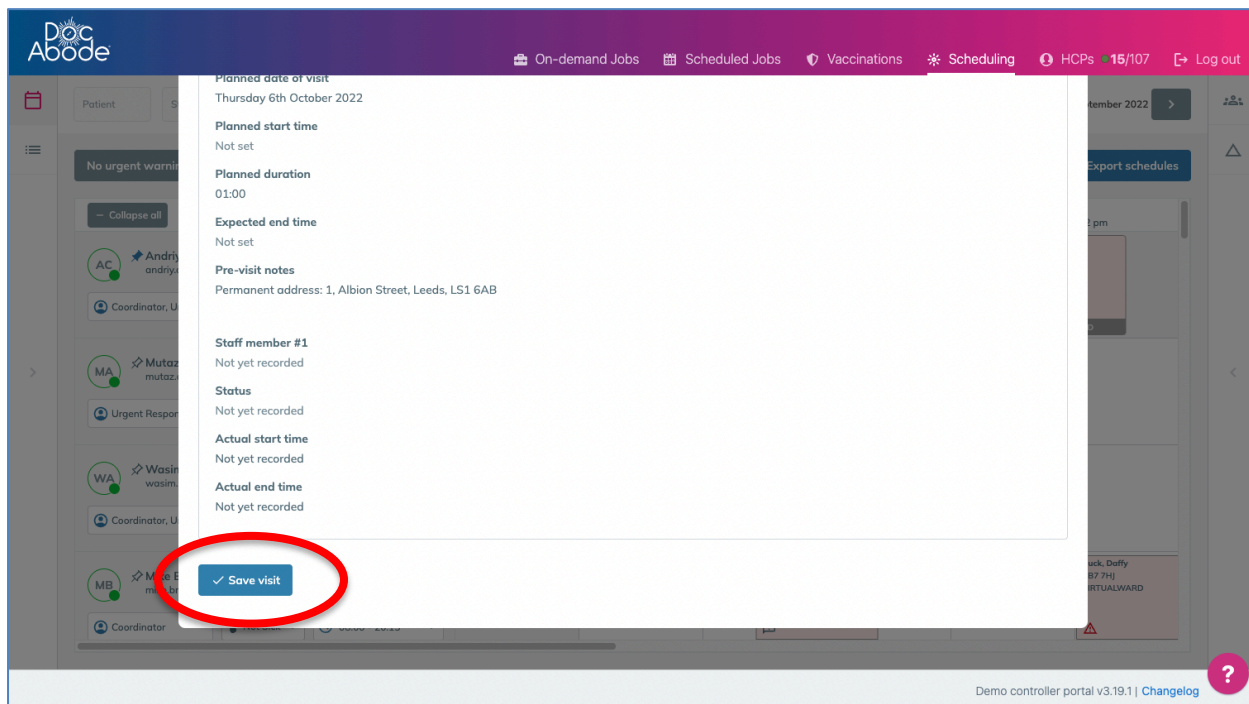
Press the Review button to see all the details for that visit in a read-only form and press *Save visit* to add the visit to Doc Abode.

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.
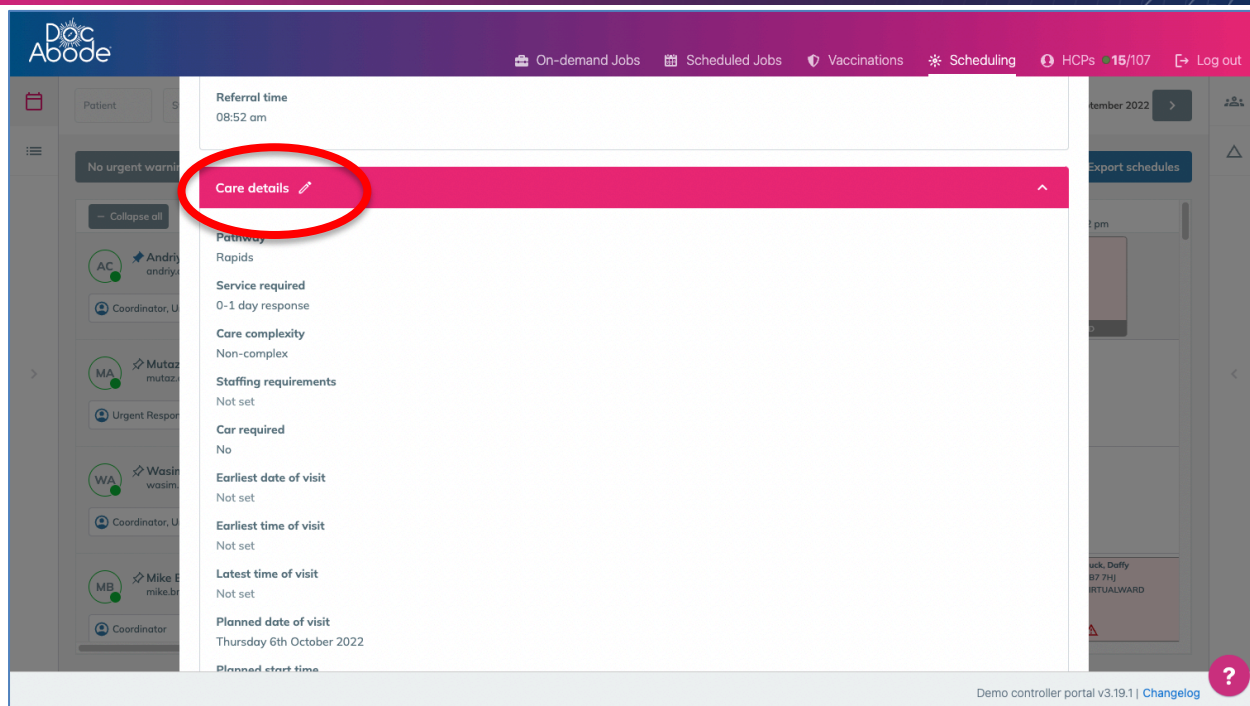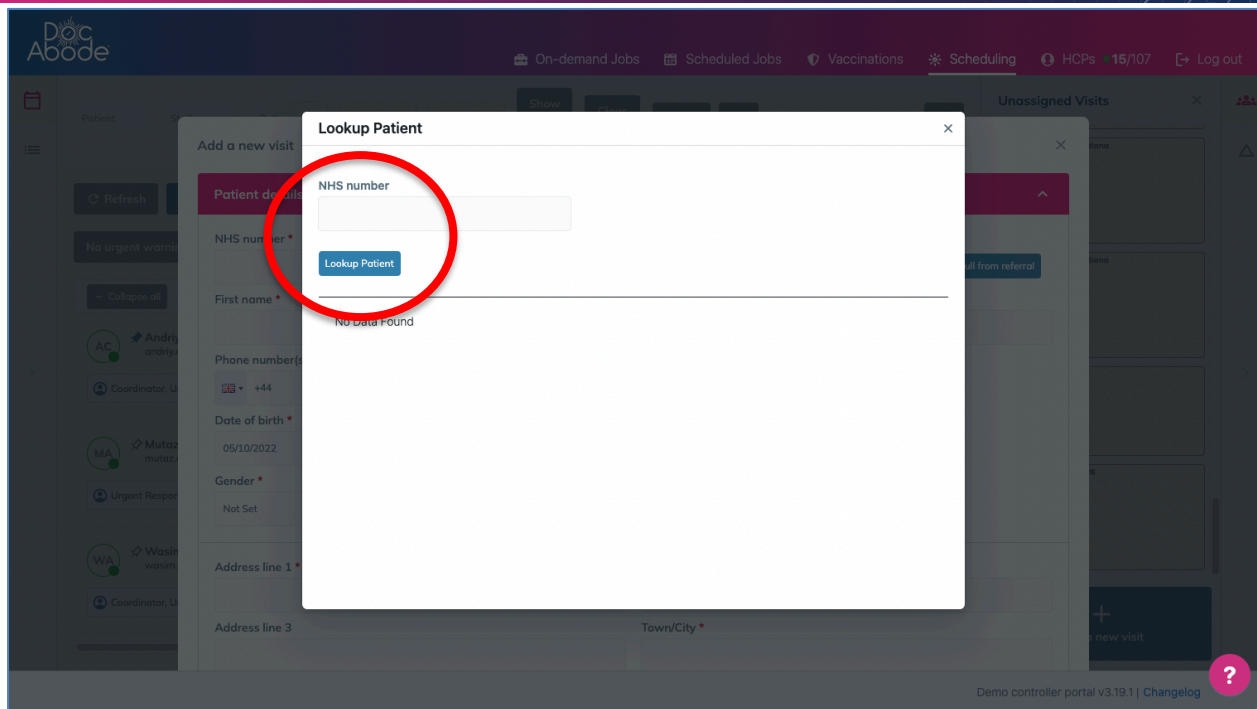
Adding a visit from a lookup

Select the Lookup *Patient button* shown below
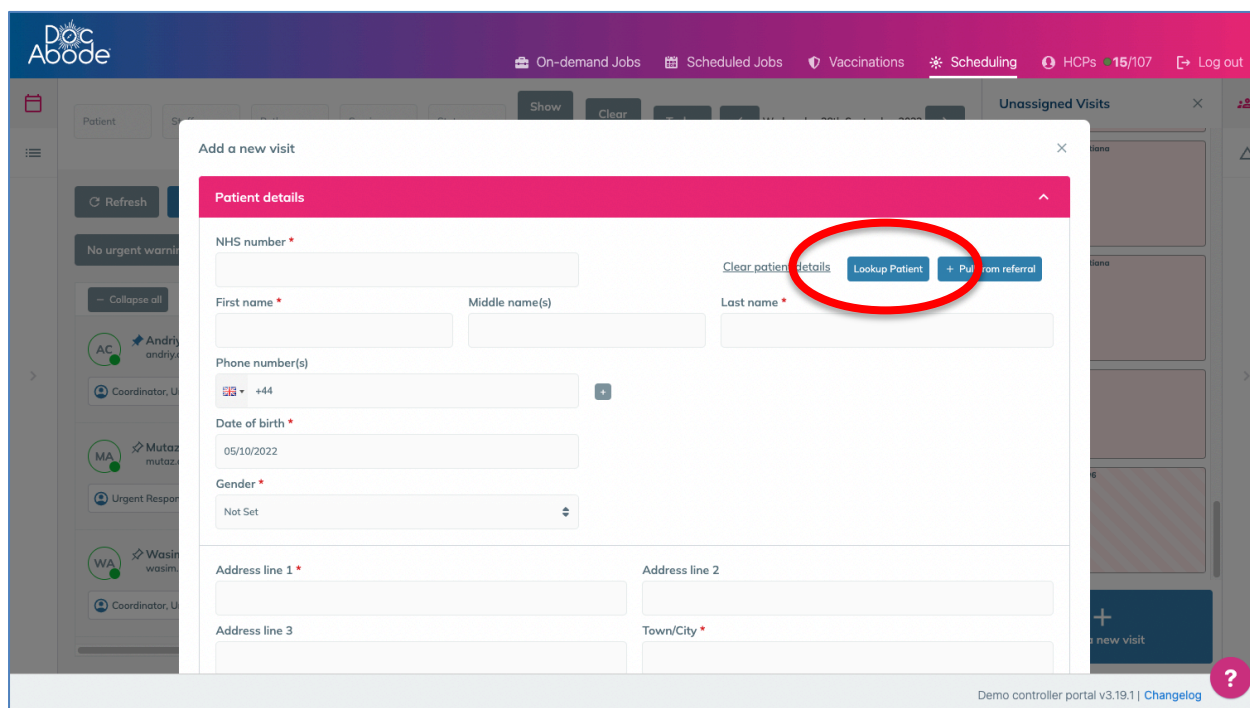
The following page will be displayed.
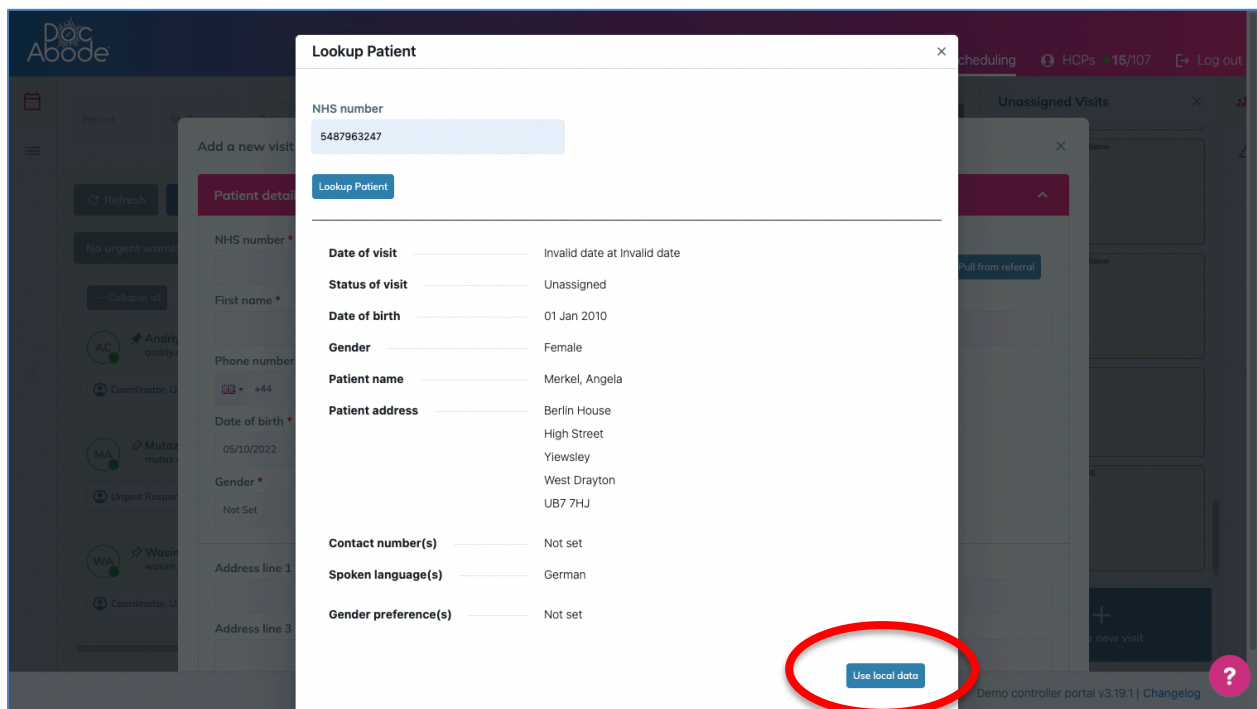
Enter the patient's NHS number, press *Lookup Patient* and the webpage will be populated with patient data.
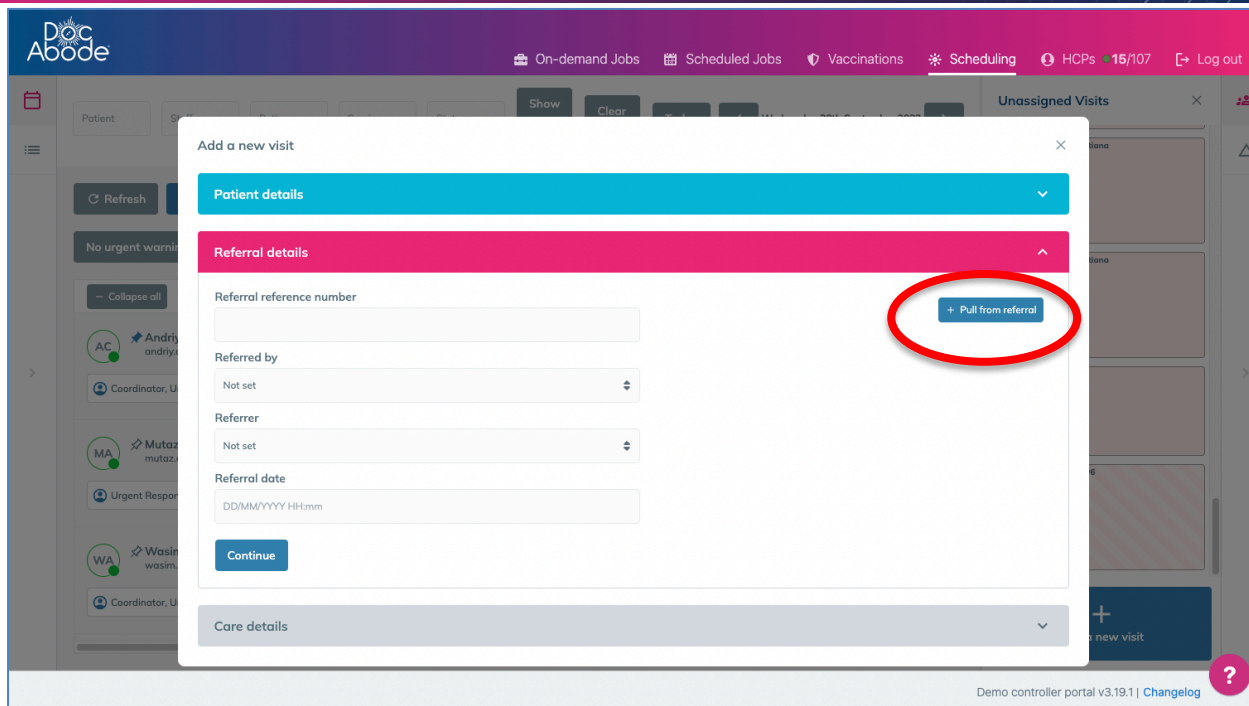
Press *Use local data* to populate the *Add a new visit* page with details about this patient.

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 manually

A useful capability here is that when entering a patient's address the system is linked to Google and addresses start to be suggested as soon as they start to be entered. We recommend using this capability as it will result in better quality addresses.

In the example below the controller has types *10 do* and a list of potential addresses has been displayed, as the controller continues to type the list will become more refined, and when the user presses return the whole address will be populated, including the Town/City and Postcode.

Adding a visit from list of known patients

An *Add visit* button is available from the patient list, from the *Quick actions* menu at the end of the row for the patient. In this case, when the button is pressed the visit is populated with the patient's details so this step can be skipped. Remaining details are entered 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

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

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.

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