

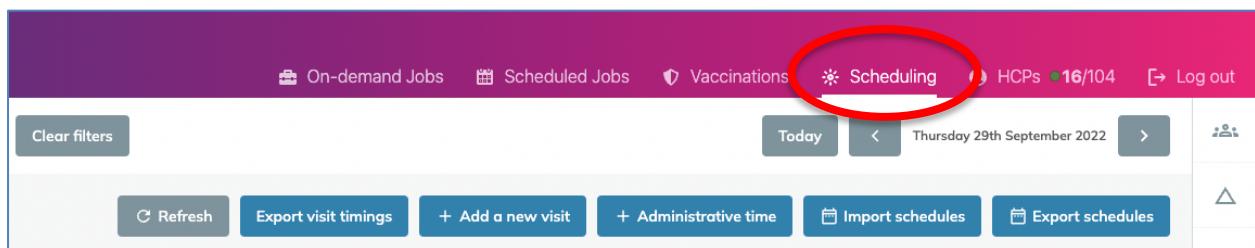
Scheduling System – Controller Functions

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:

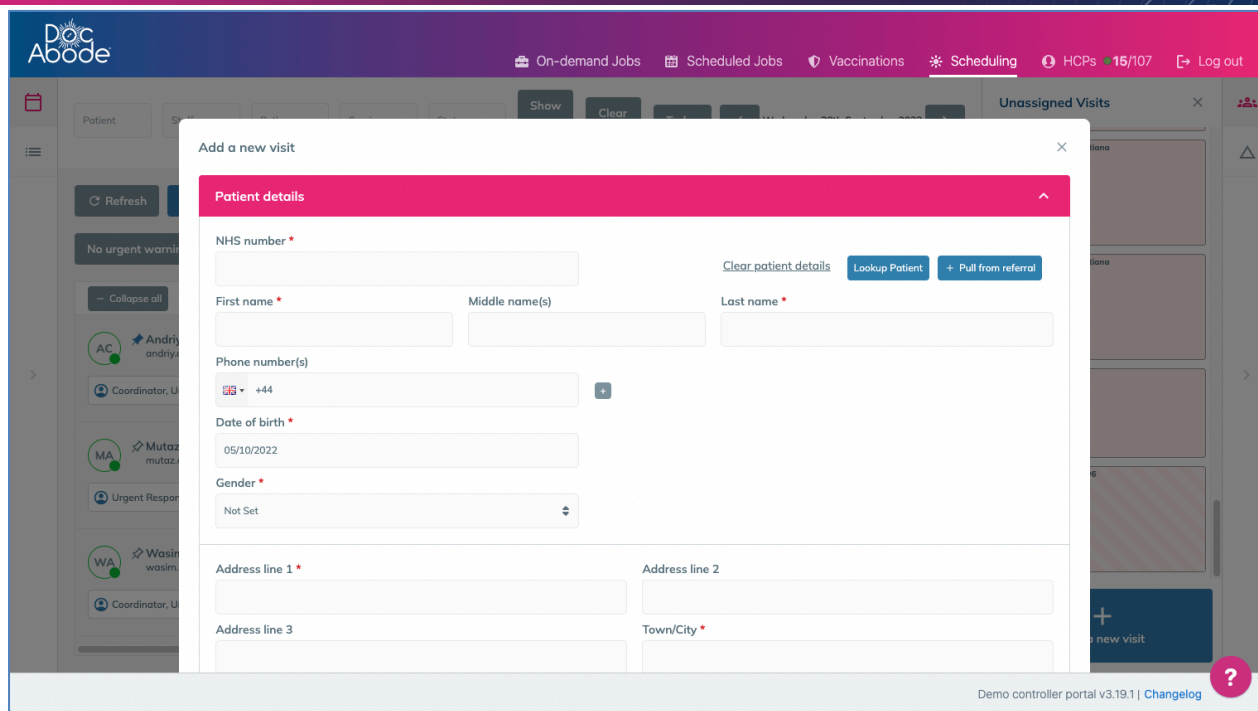
- The *Add a new visit* button on the main page
- The *Add a new visit* button at the bottom of the list of unassigned visits
- The *Quick actions* menu on the patient list view

These buttons are shown in the screenshot below.

NHS number	Patient name	Date of birth (Age)	Gender	Postcode	Last completed visit	Upcoming visit	Quick actions
548 796 3216	Pitt, Brad	01/01/2010 (Age: 12)	Male	UB7 7HJ	25/10/2022 07:00 Rapid, 0-1 day response	28/09/2022 14:00 CADS, 0-1 day response	Quick actions
123 123 1231	Potter, Harry	01/01/1990 (Age: 32)	Male	UB7 7HJ	01/11/2022 16:02 D2A, 2d reablement	27/10/2022 14:40 D2A, 2d reablement	Quick actions
548 796 3211	POWERS, Austin	01/01/2010 (Age: 12)	Male	UB7 7HJ	22/11/2022 10:00 D2A, 0-1 day response	09/03/2022 09:25 Rapid, 2h Crisis	Quick actions
548 796 3213	POWERS, Austin	01/01/2010 (Age: 12)	Male	UB7 7HJ	-	03/11/2022 09:00 Rapid, Follow Up	Quick actions
548 796 3256	POWERS, Austin	01/01/2010 (Age: 12)	Male	UB7 7HJ	01/04/2022 12:32 Rapid, 2h Crisis	-	Quick actions
548 796 3230	POWERS, Bob	01/01/2010 (Age: 12)	Male	UB7 7HJ	-	-	Quick actions
548 796 3234	POWERS, Gene	01/01/2010 (Age: 12)	Male	UB7 7HJ	03/11/2022 21:02 D2A, Over 2h response	04/11/2022 00:00 D2A, Follow Up	Quick actions
548 796 3210	POWERS, Jane	01/01/2010 (Age: 12)	Female	UB7 7HJ	01/11/2022 10:30 D2A, 0-1 day response	-	Quick actions
548 796 3289	POWERS, Oli	01/01/2010 (Age: 12)	Male	UB7 7HJ	-	-	Quick actions
548 796 3219	POWERS, William	01/01/2010 (Age: 12)	Male	UB7 7HJ	-	-	Quick actions

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



Doc Abode

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

Unassigned Visits

Add a new visit

Patient details

NHS number *

First name * Middle name(s) Last name *

Phone number(s)

Date of birth *

Gender *

Address line 1 * Address line 2

Address line 3 Town/City *

Clear patient details Lookup Patient + Pull from referral

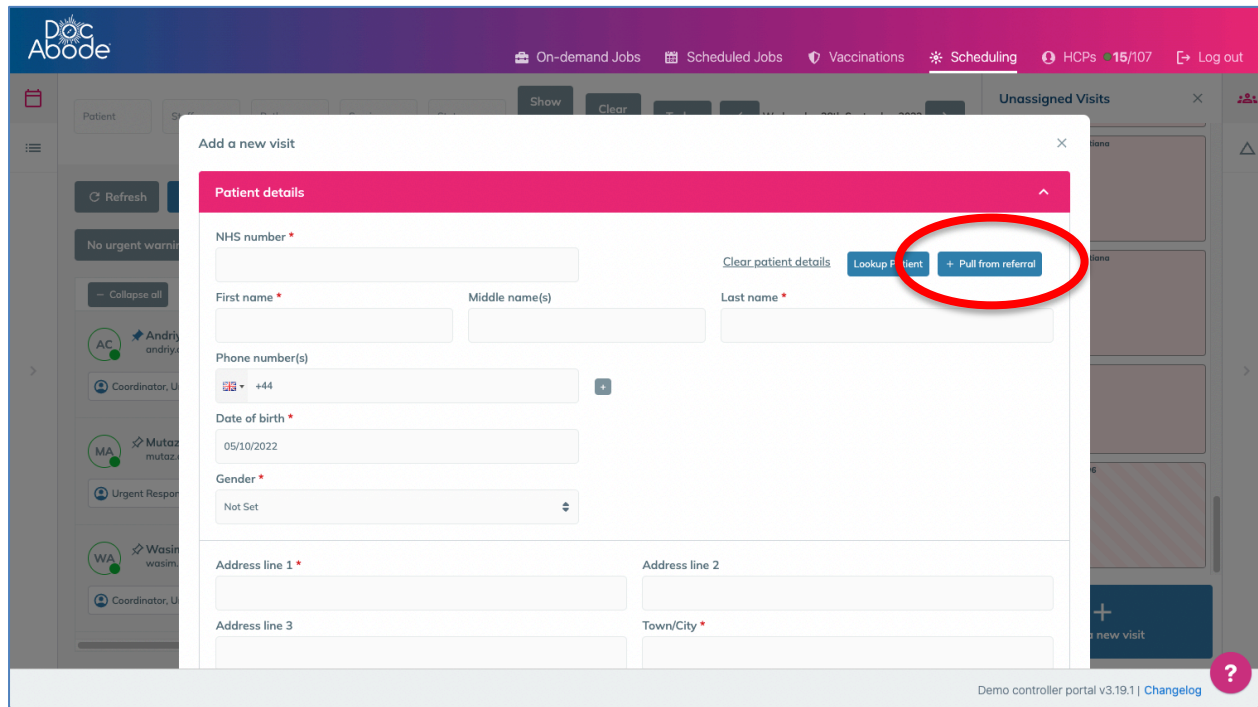
Demo controller portal v3.19.1 | Changelog

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



Doc Abode

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

Unassigned Visits

Add a new visit

Patient details

NHS number *

First name * Middle name(s) Last name *

Phone number(s)

Date of birth *

Gender *

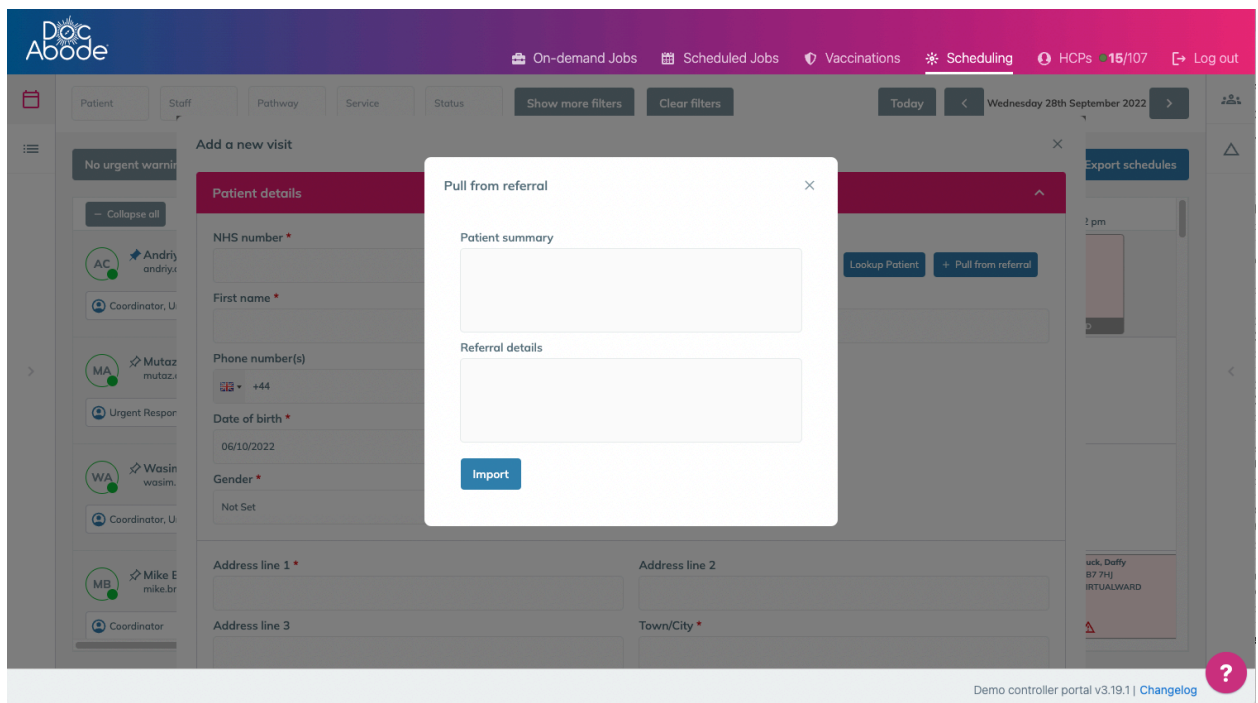
Address line 1 * Address line 2

Address line 3 Town/City *

Clear patient details Lookup Patient + Pull from referral

Demo controller portal v3.19.1 | Changelog

The following page will be displayed.



Doc Abode

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

Today Wednesday 28th September 2022

Add a new visit

Patient details

NHS number *

First name * Middle name(s) Last name *

Phone number(s)

Date of birth *

Gender *

Address line 1 * Address line 2

Address line 3 Town/City *

Pull from referral

Patient summary

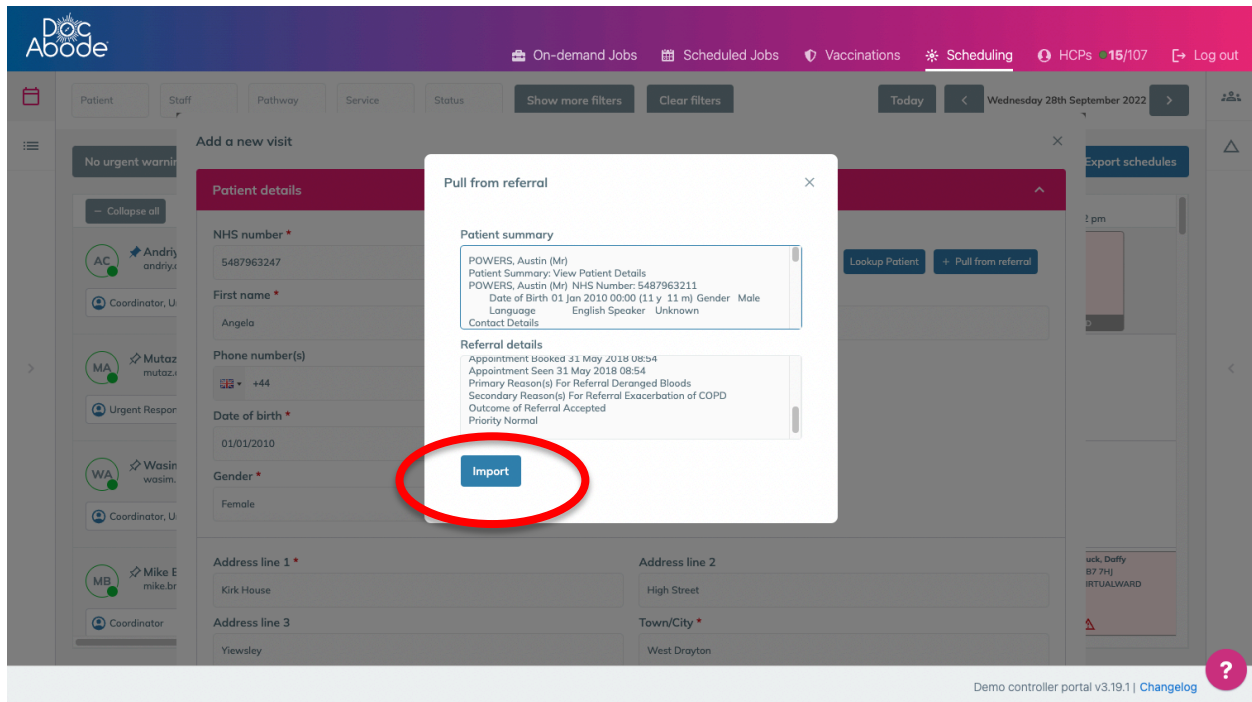
Referral details

Import

Demo controller portal 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.

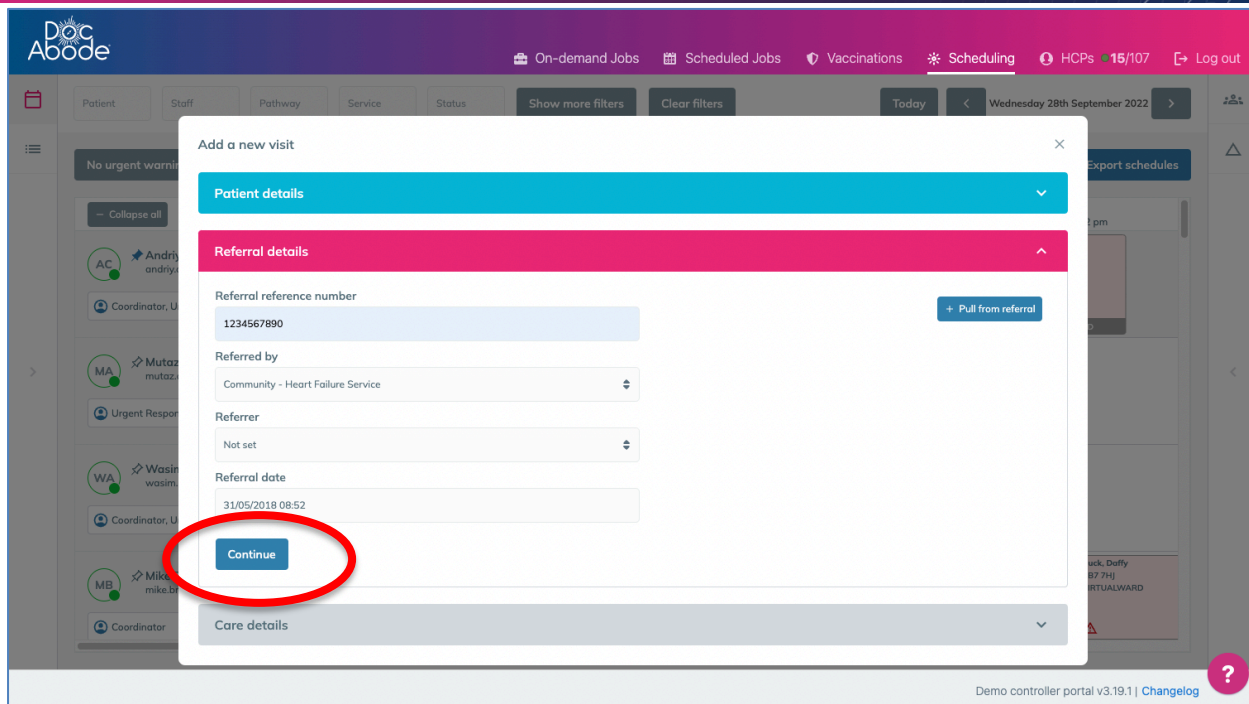
Once details that have been obtained from the patient record system have been copied into the appropriate windows, press the *Import* button to load these in Doc Abode.



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

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.

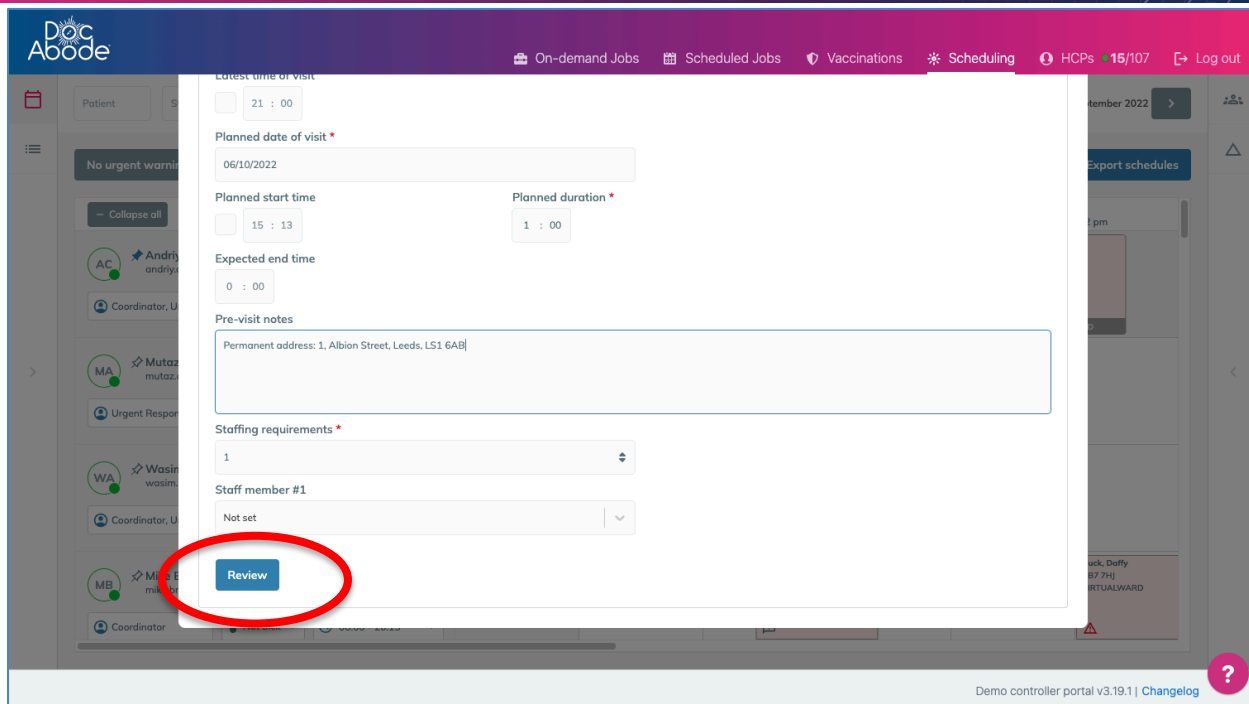
The system helps to ensure quality data is recorded by validating the NHS number, phone number and postcode are in correct UK formats.

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.



Doc Abode

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

Latest time of visit
21 : 00

Planned date of visit *
06/10/2022

Planned start time
15 : 13

Planned duration *
1 : 00

Expected end time
0 : 00

Pre-visit notes
Permanent address: 1, Albion Street, Leeds, LS1 6AB

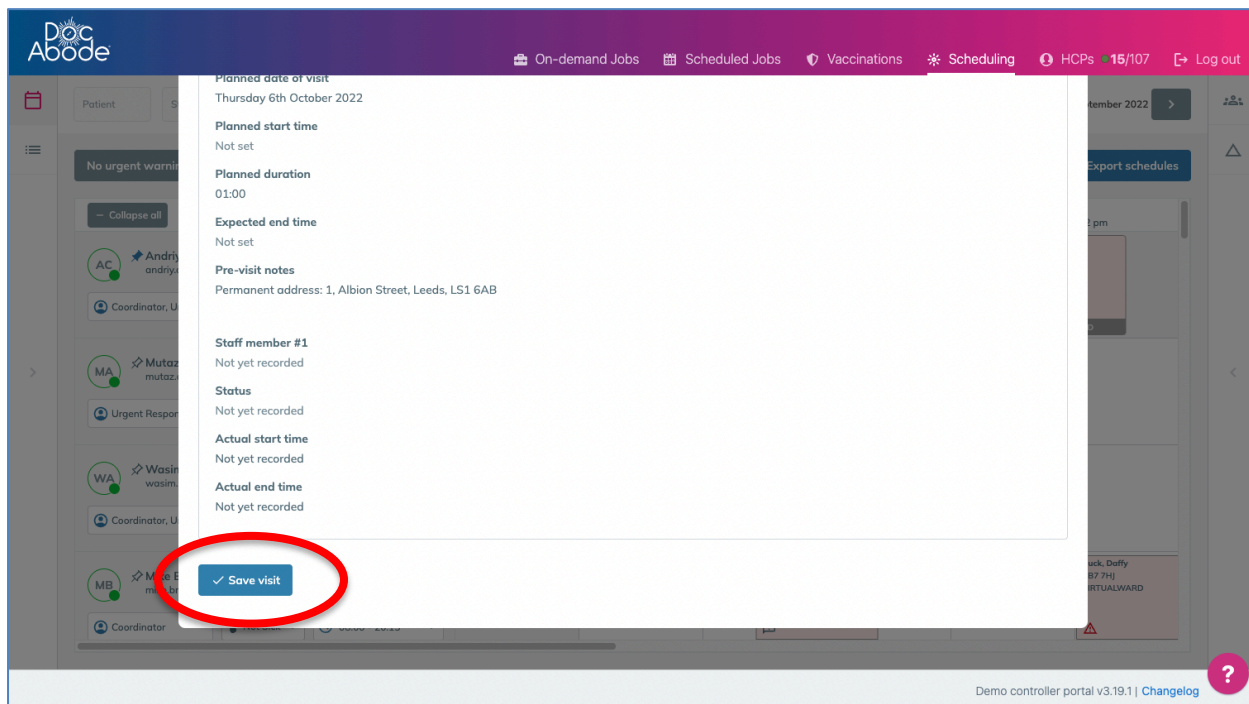
Staffing requirements *
1

Staff member #1
Not set

Review

Demo controller 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.



Doc Abode

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

Planned date of visit
Thursday 6th October 2022

Planned start time
Not set

Planned duration
01:00

Expected end time
Not set

Pre-visit notes
Permanent address: 1, Albion Street, Leeds, LS1 6AB

Staff member #1
Not yet recorded

Status
Not yet recorded

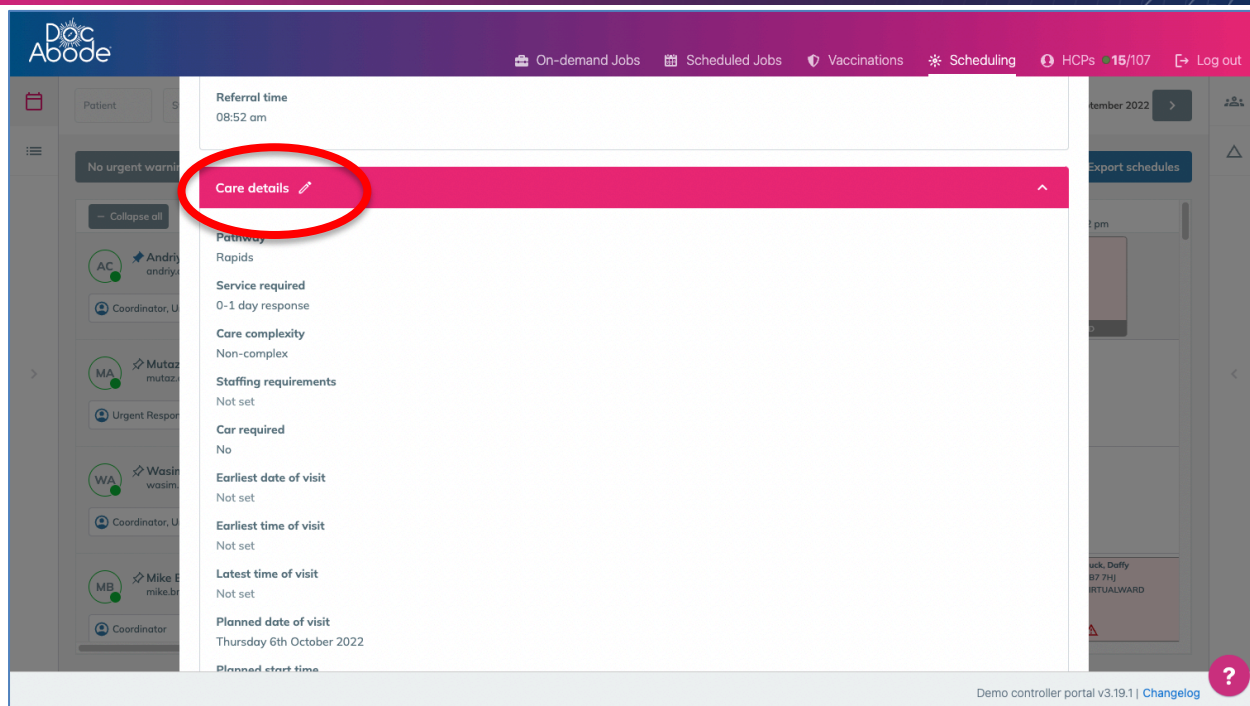
Actual start time
Not yet recorded

Actual end time
Not yet recorded

✓ Save visit

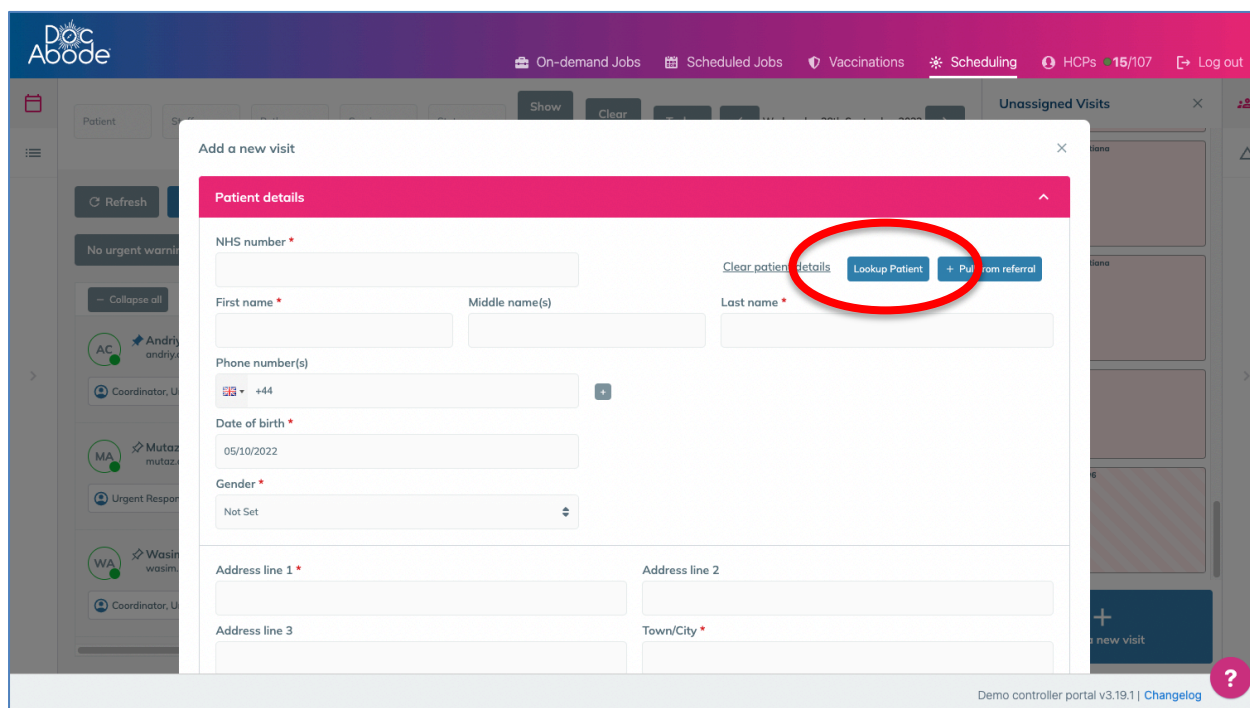
Demo controller portal v3.19.1 | Changelog ?

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.

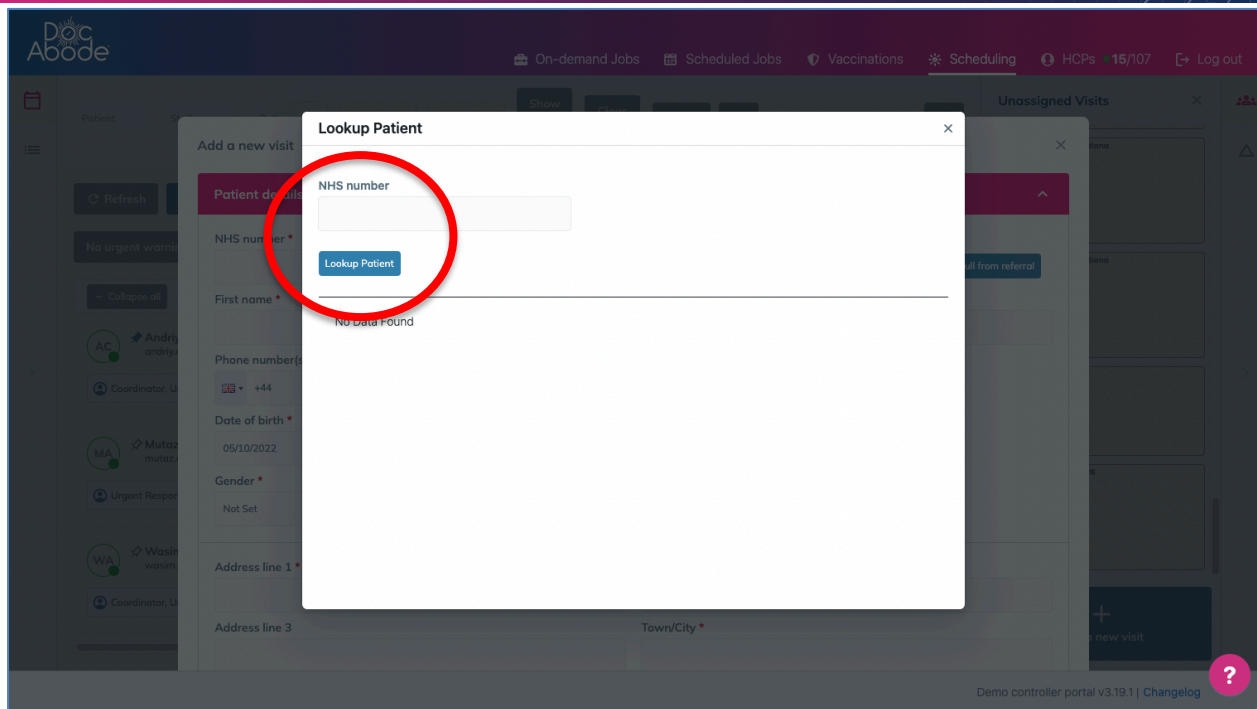


Adding a visit from a lookup

Select the Lookup *Patient* button shown below



The following page will be displayed.



Doc Abode

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

Lookup Patient

NHS number

Lookup Patient

No Data Found

First name *

Phone number

+44

Date of birth *

05/10/2022

Gender *

Not Set

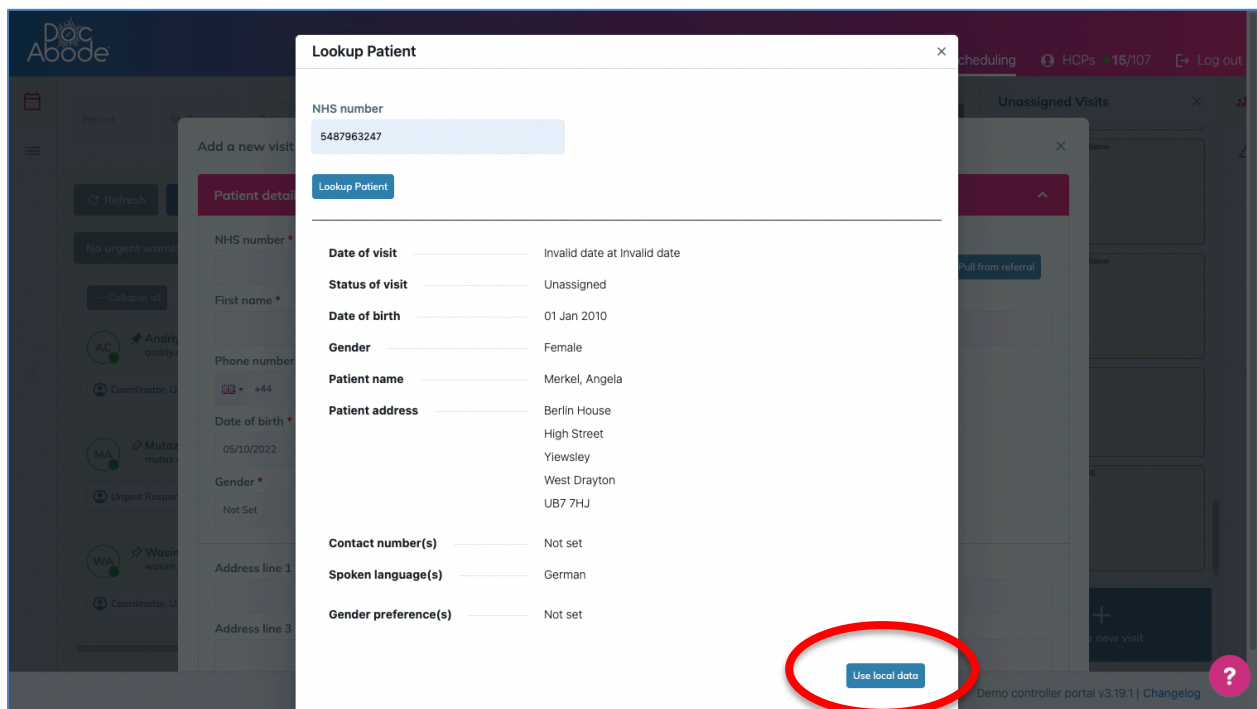
Address line 1 *

Address line 3

Town/City *

Demo controller portal v3.19.1 | Changelog

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



Doc Abode

Scheduling HCPs 15/107 Log out

Lookup Patient

NHS number

5487963247

Lookup Patient

Date of visit Invalid date at Invalid date

Status of visit Unassigned

Date of birth 01 Jan 2010

Gender Female

Patient name Merkel, Angela

Patient address Berlin House
High Street
Yiewsley
West Drayton
UB7 7HJ

Contact number(s) Not set

Spoken language(s) German

Gender preference(s) Not set

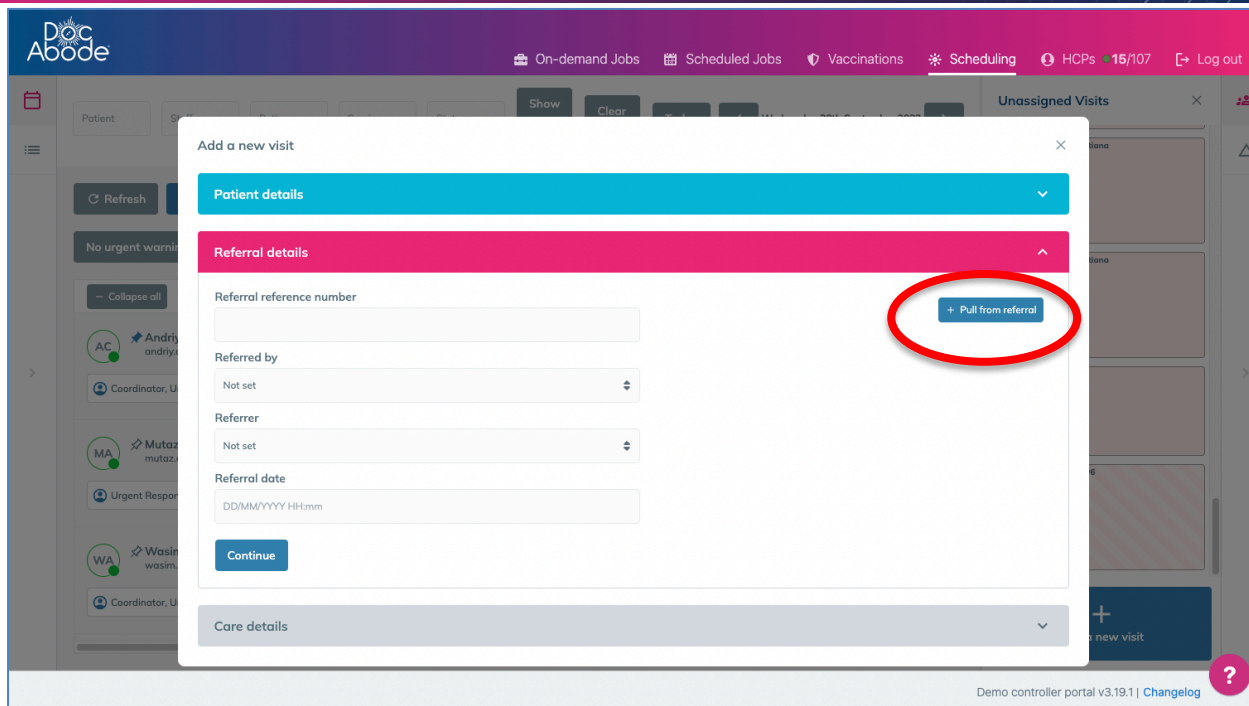
Use local data

Demo controller portal v3.19.1 | Changelog

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.

Doc Abode On-demand Jobs Scheduled Jobs Vaccinations **Scheduling** HCPs 15/98 Log out

Phone: +44 7777 123456

Date of birth: 01/01/1950

Gender: Male

Address line 1: 18 do
 18 Dock Street London, UK
 18 Dover Street London, UK
 18 Dorset Square London, UK
 18 Downhill Street Partick, Glasgow, UK
 18 Dorking Road Epsom, UK

Address line 2:
 Town/City:
 powered by Google

Patient preference

Spoken language: Search... Gender of visiting staff: Search...

Demo controller portal v3.23.0 Changelog ?

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.

NHS number	Patient name	Date of birth (Age)	Gender	Postcode	Last completed visit	Upcoming visit	
505 534 5485	Abbott, Herminio Sage	19/03/1945 (Age: 77)	Other non-listed	H9 6PD	-	-	Quick actions
548 796 3236	America, Captain	01/01/2010 (Age: 12)	Male	UB7 7HJ	15/06/2022 09:45 Rapid, Within 2h response	16/06/2022 09:00 Rapid, Follow Up	Quick actions
040 405 0506	Another visit, Oliver	06/10/2022 (Age: 0)	Intersex	HA2 6DS	-	-	Quick actions
282 782 9273	Bahringer, Kennedi Marlowe	29/01/1943 (Age: 79)	Not provided	W9 0QE	-	-	Quick actions
253 963 2039	Becker, Adam Jamie	13/06/1949 (Age: 73)	Non-binary	I5 7HW	-	-	Quick actions
548 796 3245	Beckham, David	01/01/2010 (Age: 12)	Male	UB7 7HJ	14/07/2022 14:30 Rapid, 0-1 day response	-	Quick actions
708 728 5500	Beer, Alfonso Sasha	15/01/1964 (Age: 58)	Male	K2 0XC	-	20/10/2022 16:34 CADS, Within 2h response	Quick actions
548 796 3244	Biden, Joseph	01/01/2010 (Age: 12)	Male	BD14 6JY	-	16/06/2022 17:03 CADS, 0-1 day response	Quick actions
352 416 6851	Bogisich, Trudie Billie	29/09/1980 (Age: 42)	Transgender	C1 3TV	-	03/11/2022 18:43 CADS, Within 2h response	Quick actions
410 843 0479	Bosco, Emerald Charlie	18/05/1933 (Age: 89)	Not provided	D7 5QE	-	-	Quick actions

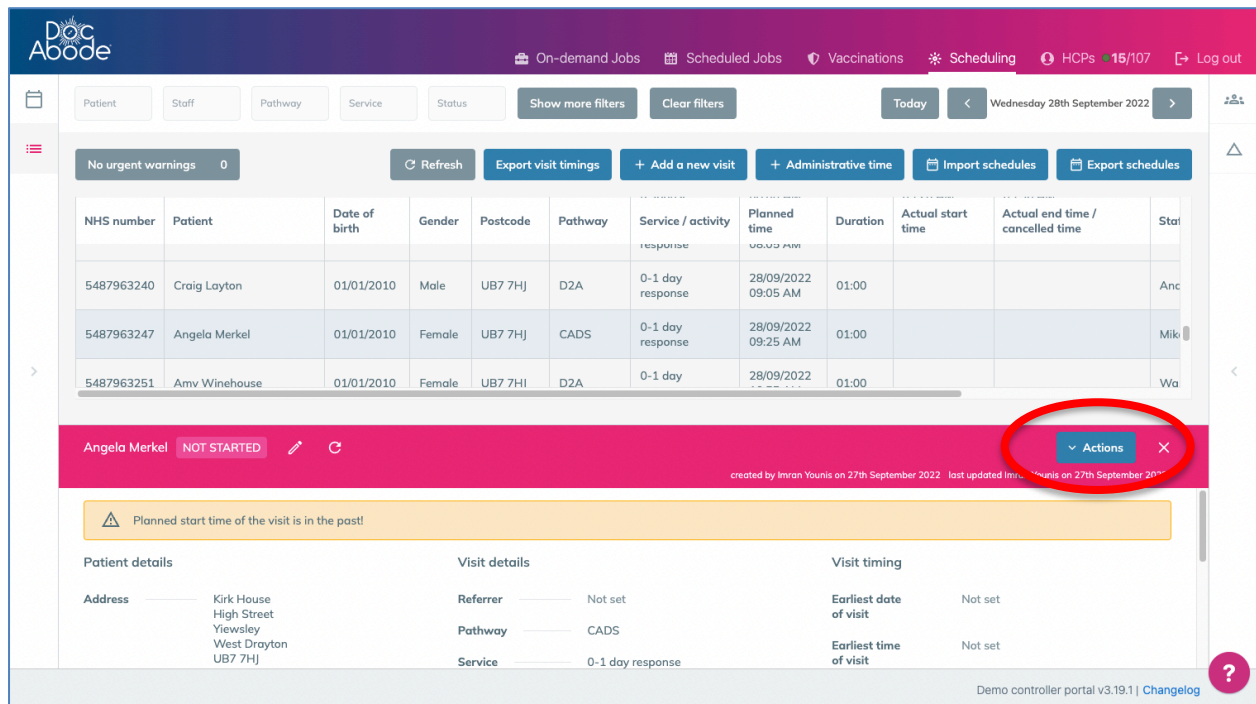
Demo controller portal v3.23.0 Changelog ?

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 shows the Doc Abode Scheduling Controller interface. At the top, there's a navigation bar with links for On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling, HCPs (15/107), and Log out. Below this is a filter section with tabs for Patient, Staff, Pathway, Service, and Status, along with buttons for Show more filters and Clear filters. A date selector shows 'Today' and 'Wednesday 28th September 2022'. 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 table shows three visits, with the second one, Angela Merkel, highlighted. Below the table, a detailed view for Angela Merkel is shown, including a 'NOT STARTED' status, a warning message 'Planned start time of the visit is in the past!', and sections for Patient details, Visit details, and Visit timing. An 'Actions' button is circled in red in the top right corner of the detailed view.

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

Planned start time of the visit is in the past!

Patient details

Address: Kirk House, High Street, Yiewsley, West Drayton, UB7 7HJ

Visit details

Referrer: Not set
Pathway: CADS
Service: 0-1 day response

Visit timing

Earliest date of visit: Not set
Earliest time of visit: Not set

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*.

NHS number	Patient	Date of birth	Gender	Postcode	Pathway	Service / activity	Planned time	Duration	Actual start time	Actual end time / cancelled time	Status
5487963240	Craig Layton	01/01/2010	Male	UB7 7HJ	D2A	0-1 day response	28/09/2022 09:05 AM	01:00			Completed
5487963247	Angela Merkel	01/01/2010	Female	UB7 7HJ	CADS	0-1 day response	28/09/2022 09:25 AM	01:00			Planned
5487963251	Amv Winehouse	01/01/2010	Female	UB7 7HI	D2A	0-1 day	28/09/2022	01:00			Planned

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.