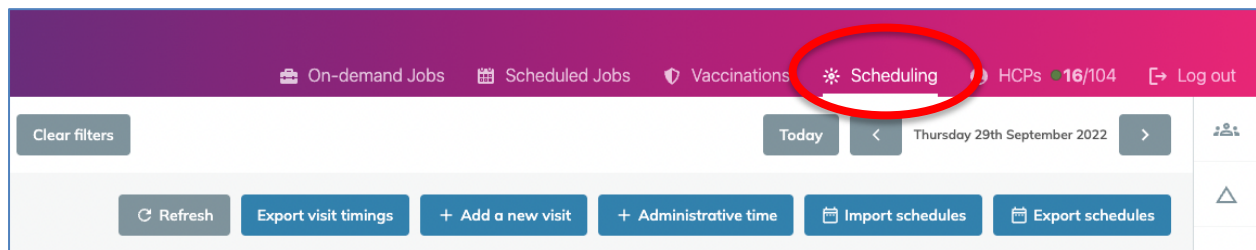


Scheduling System – Controller Functions

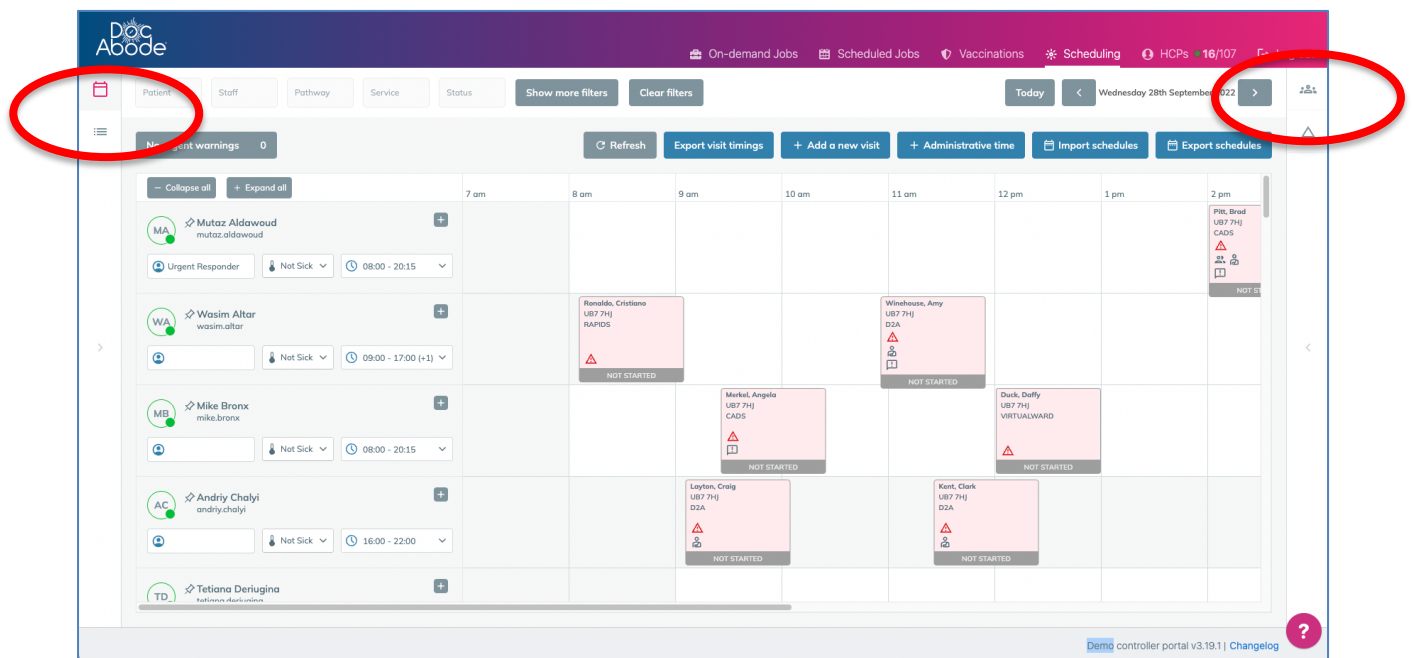
Managing single visits

This document describes how to manage visits that have a single HCP tasked to carry this out. A separate guide describes how to manage double-up visits.

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



2. A webpage similar to the example below is displayed.



From the controller's perspective, the first step in managing a visit is to find the visit itself.

Visits can be found in three places

- Calendar view (as shown above) will display visits assigned to HCPs presented as tiles in their swim lane
- List view will present all visits, both assigned and unassigned, sorted by patient surname
 - The choice of calendar view and list view is selected via the icons on the top left

- The Unassigned Visits pane (select the icon on the top right) will present a list of unassigned visits only, sorted to show the oldest first.

The powerful Doc Abode filtering capability can be used in any of these views to help to find the visit of interest. The *Viewing visits* guide explains how to find a visit using filters in detail.

Visits are also displayed on the map view, so the controller can ensure HCPs are not asked to make unnecessarily long journeys.

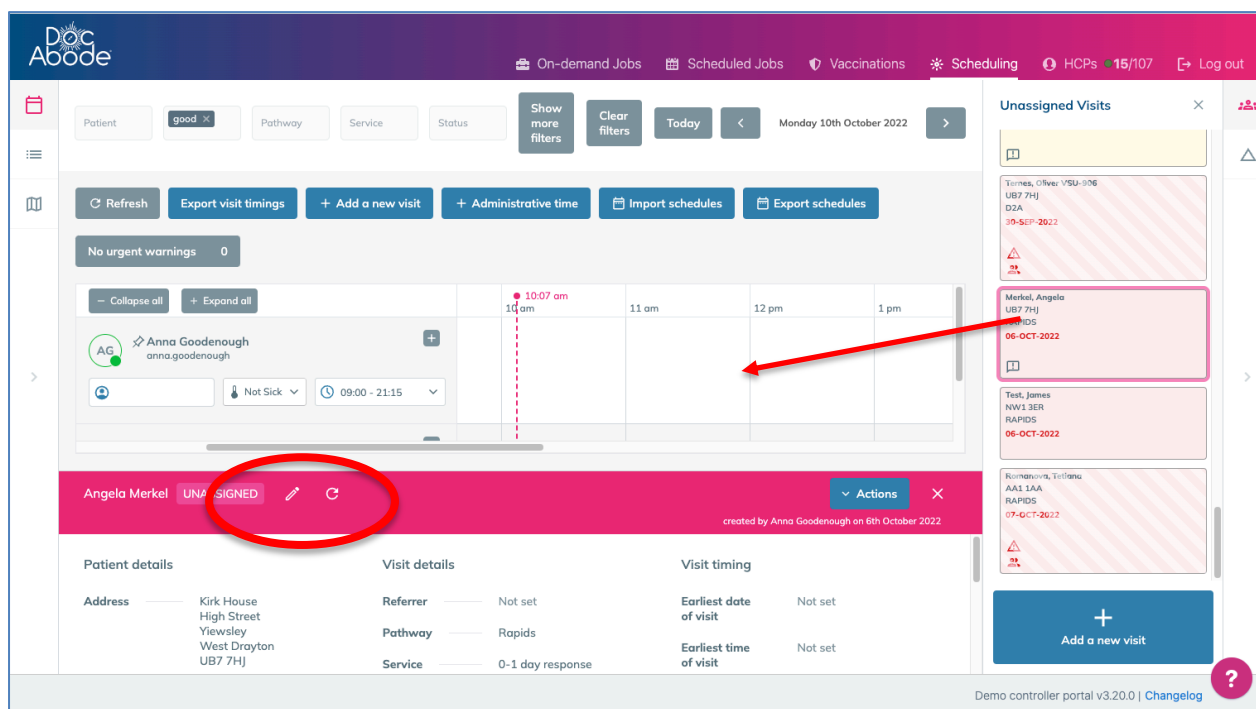
In essence, the controller can do one of four main things to a visit:

- Assign a visit to an HCP, and reversing that if needed
- Change visit details about the patient, referral and care to be provided
- Change visit status
- Abort a visit, and reversing that if needed

Assigning a visit to an HCP

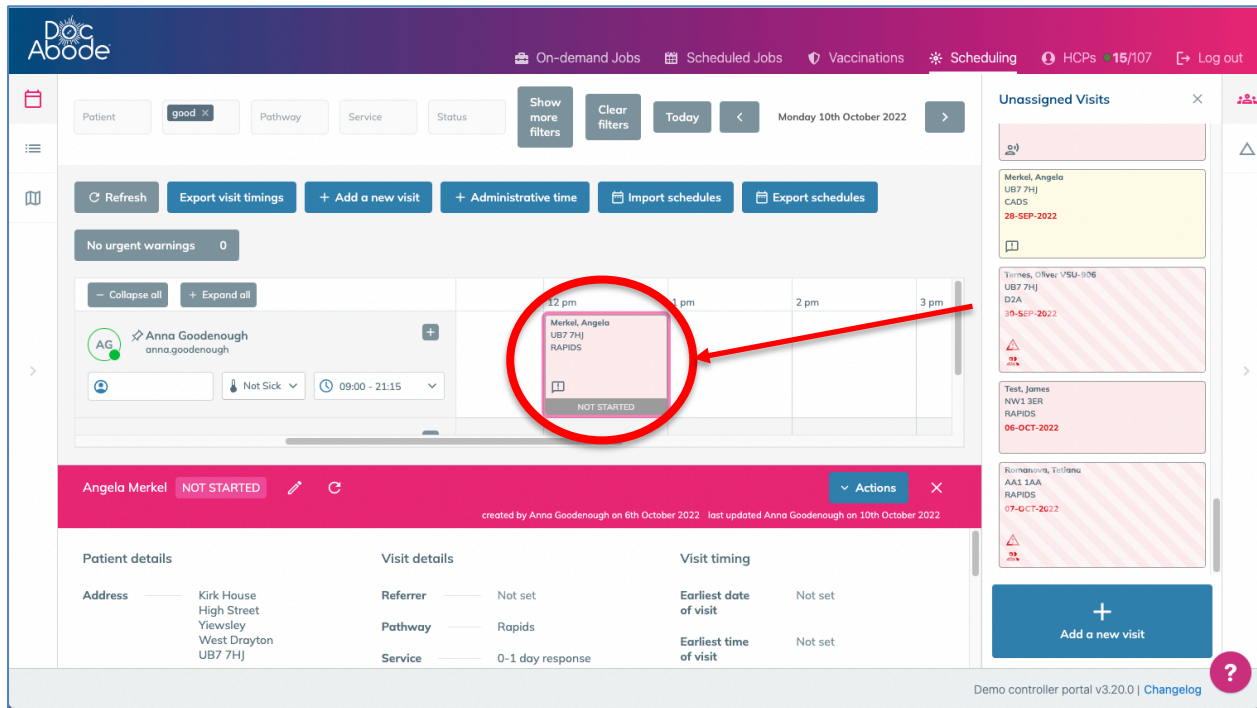
There are two ways to do this

- Using drag and drop from the unassigned visits pane to the calendar view. This is an easy and intuitive way to assign visits and to change the time. Note the visit can also be dragged from the HCP's swim lane to another HCP, a different time and even dragged back to the unassigned visits list.
In most cases this is the easiest way to assign and un-assign visits
- Going to the full details window and editing the third section, headed Care Details

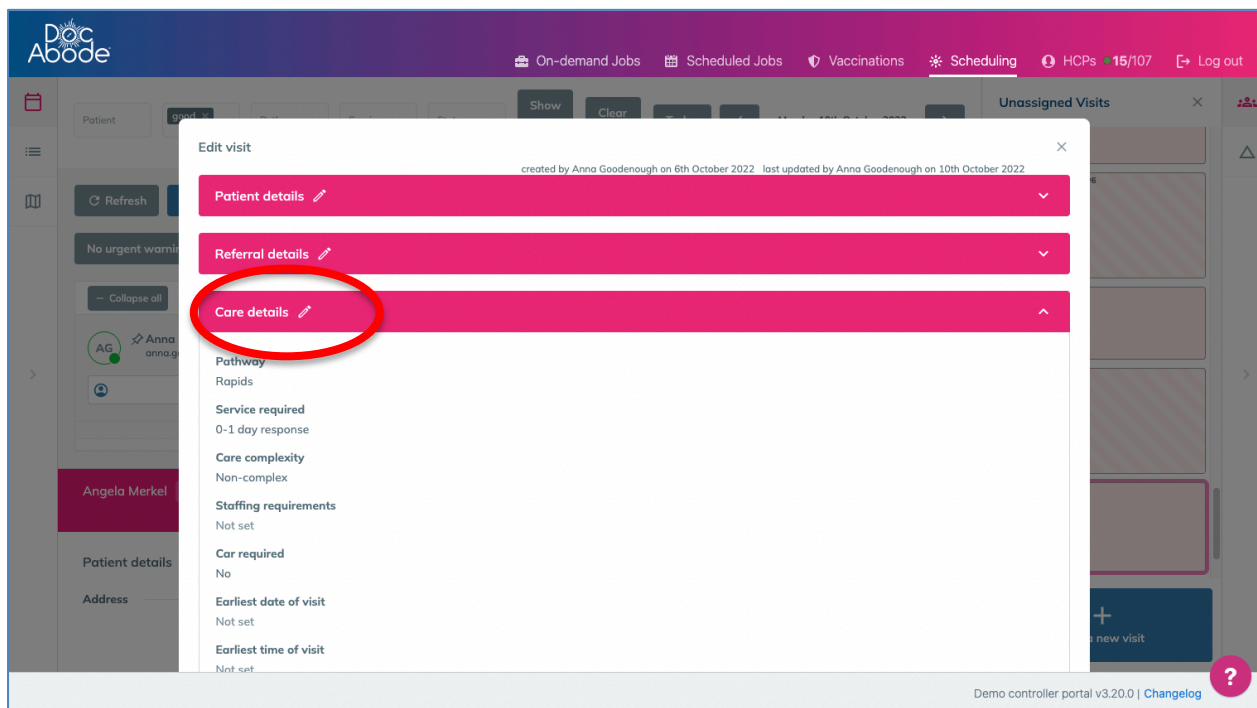


The screenshot displays the Doc Abode Scheduling Controller interface. At the top, there's a navigation bar with tabs for On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling, HCPs (15/107), and Log out. Below this, a filter bar includes Patient (good), Pathway, Service, Status, and buttons for Show more filters, Clear filters, Today, and a date selector for Monday 10th October 2022. The main area features a calendar view for the selected date. A red arrow points from the 'Unassigned Visits' pane on the right to a visit card for 'Angela Merkel' in the calendar. The visit card is circled in red. Below the calendar, the 'Care Details' section is visible, showing patient details, visit details, and visit timing. The 'Unassigned Visits' pane lists several visits, including 'Turner, Oliver', 'Merkel, Angela', 'Test, James', and 'Rumyantova, Tatyana'.

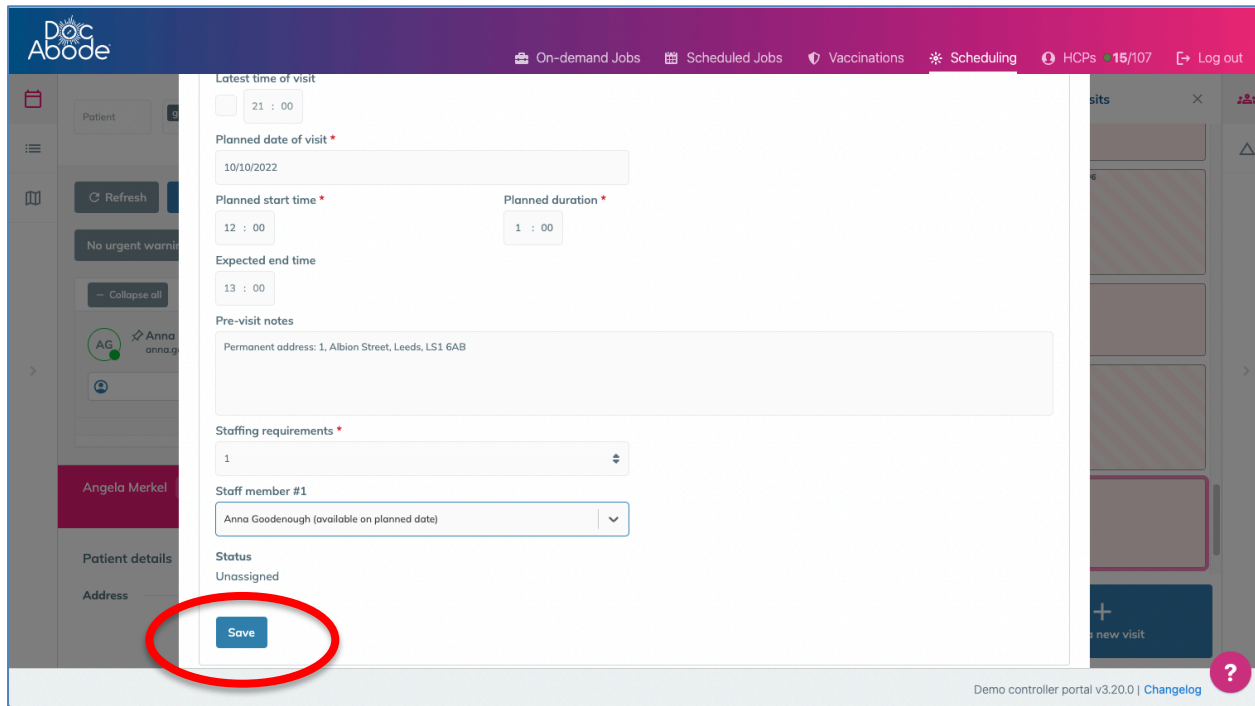
In the screenshot below the visit has been dragged using the mouse



Editing a visit to assign an HCP in the Care details pane is shown below. Select the pencil icon to enable editing of the section and complete the details required



The controller can enter the HCP and edit the date and time of the visit, as well as other details, using this pane. Press the Save button to save changes.



The screenshot shows the 'Edit Visit' pane in the Doc Abode Scheduling Controller. The pane is titled 'Edit Visit' and contains the following fields:

- Latest time of visit:** A time selector set to 21 : 00.
- Planned date of visit:** A date selector set to 10/10/2022.
- Planned start time:** A time selector set to 12 : 00.
- Planned duration:** A time selector set to 1 : 00.
- Expected end time:** A time selector set to 13 : 00.
- Pre-visit notes:** A text area containing 'Permanent address: 1, Albion Street, Leeds, LS1 6AB'.
- Staffing requirements:** A dropdown menu set to 1.
- Staff member #1:** A dropdown menu set to 'Anna Goodenough (available on planned date)'.
- Status:** A dropdown menu set to 'Unassigned'.

The 'Save' button is located at the bottom of the pane and is highlighted with a red circle.

The Doc Abode will display messages when the data being entered in this way does not make sense, for example if the HCP is not set up to be working in the time period selected, or the date and time of the visit is outside the acceptable range set up against the visit – for example the visit may be set up to start *no earlier than* or *no later than* a specific time. The various messages are easy to understand and visit details can be changed accordingly.

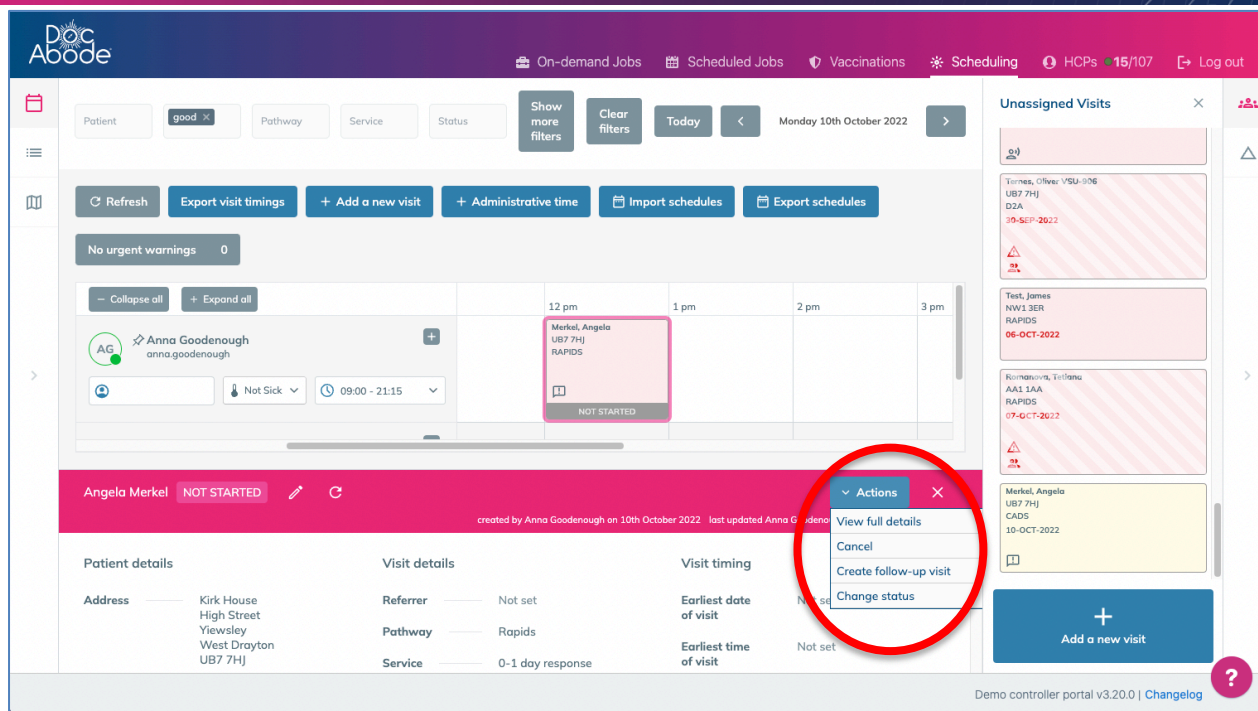
Changing visit details

In the example above the assignment of an HCP was illustrated. In practice any of the three sections in this panel (Patient details, referral details and Care details) can be edited. In this way any inaccuracies can be corrected on the visit record and saved.

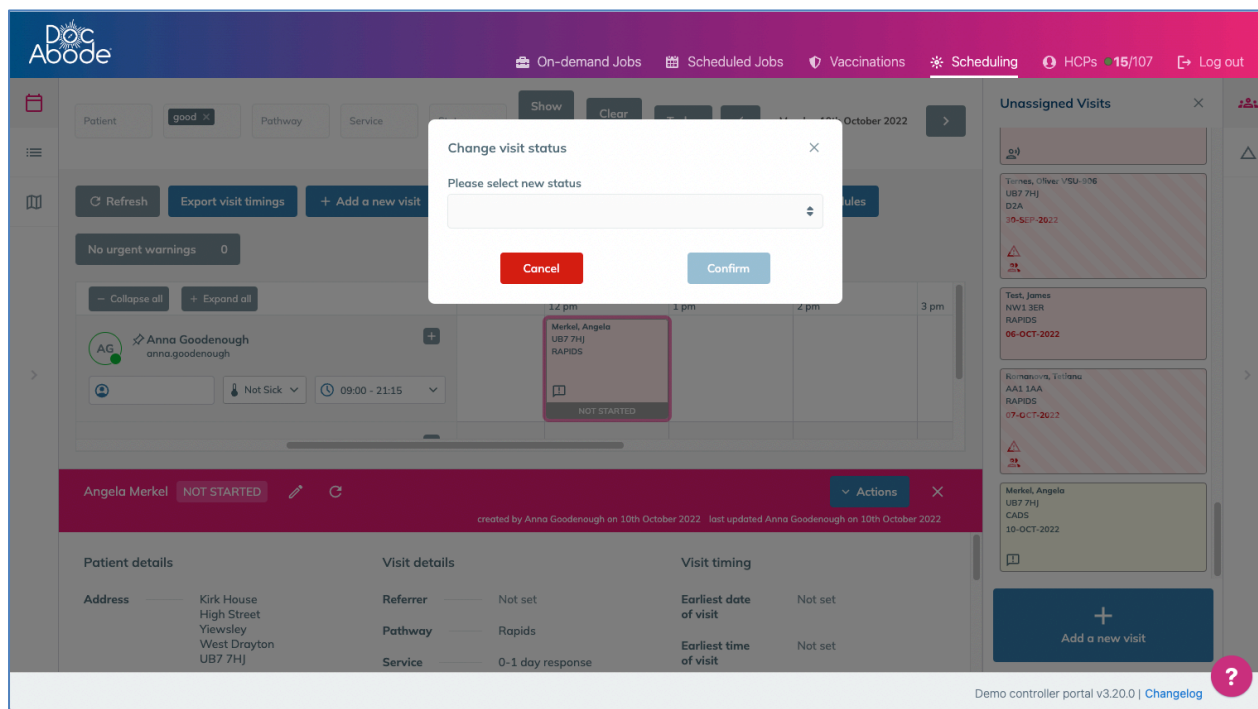
Simply select the visit, press the pencil icon on the section to be changed, make the required changes and press Save.

Changing visit status

Changing the status of a visit is carried out via the *Action* button on the visit details pane



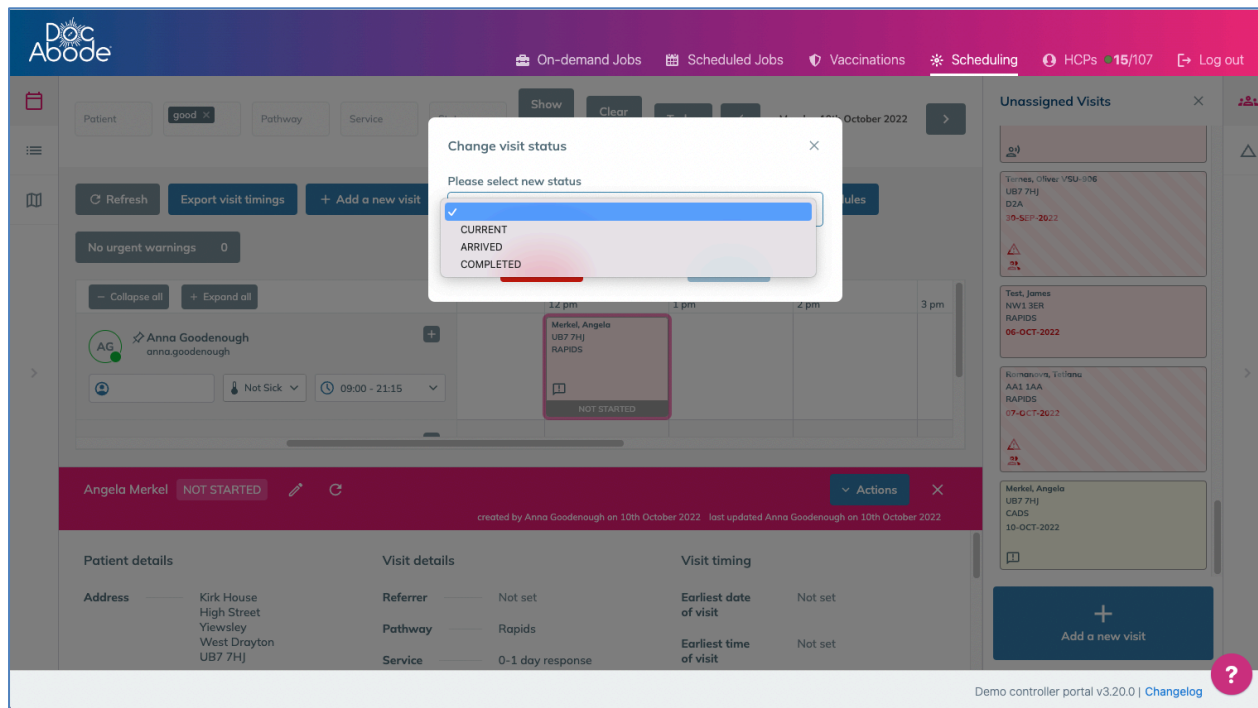
Pressing the Action button will result in a drop-down list of context-sensitive actions that can be made for the visit. Selecting the *Change status* option will present the following window



Pressing the arrows to the right will reveal a list of possible statuses to select. Highlight the desired status and press return.

Alternatively, if the controller knows which new status is appropriate, they can enter the first letter or two of the required status to find it and then press return.

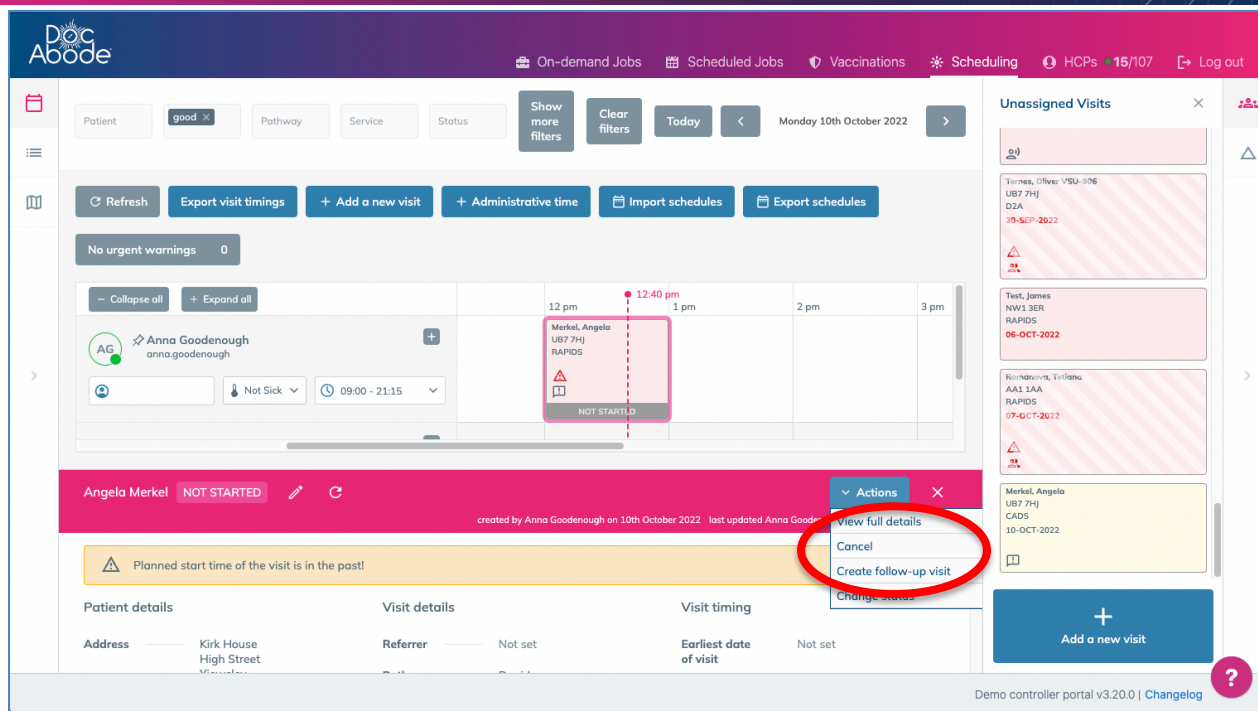
Note it is also possible to enter actual start and end time of this visit in this window, for convenience.



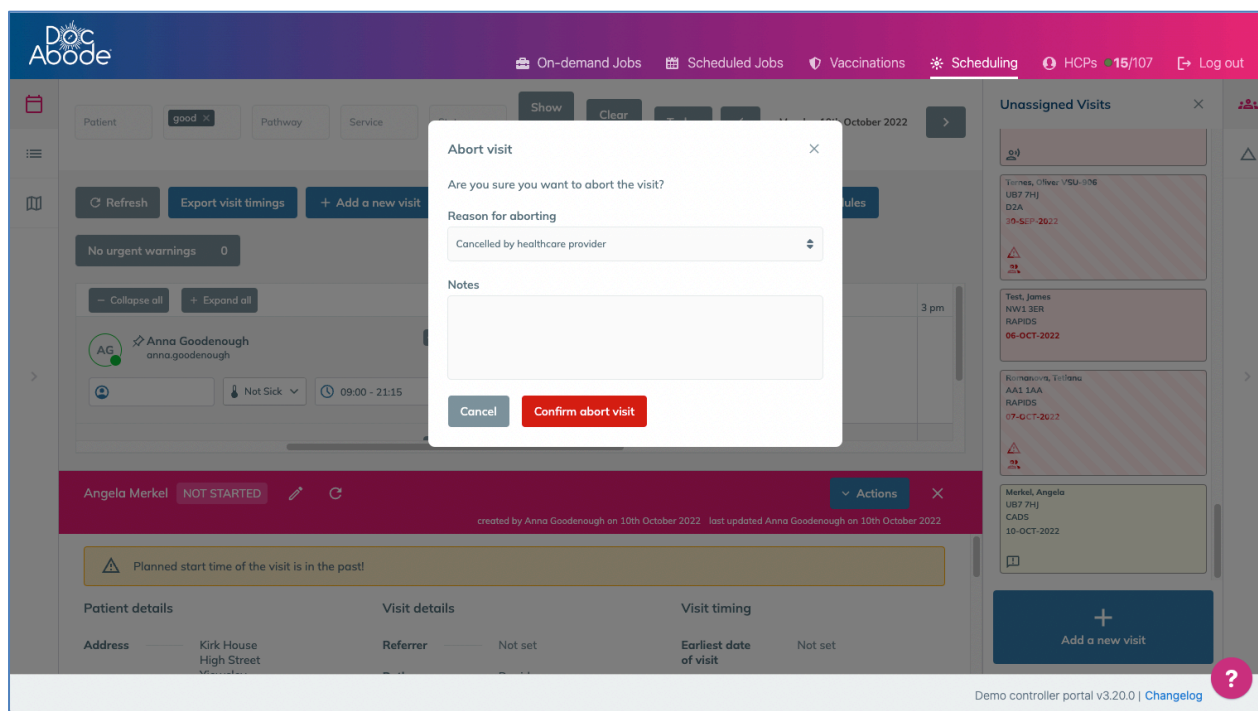
Aborting a visit, and reversing that if needed

If a visit is no longer required, for example if the patient is admitted to hospital, then the visit can be aborted. This will remove the visit from the Doc Abode web pages but it does not delete the entry. The visit can be re-instated later if this was done by mistake or circumstances change.

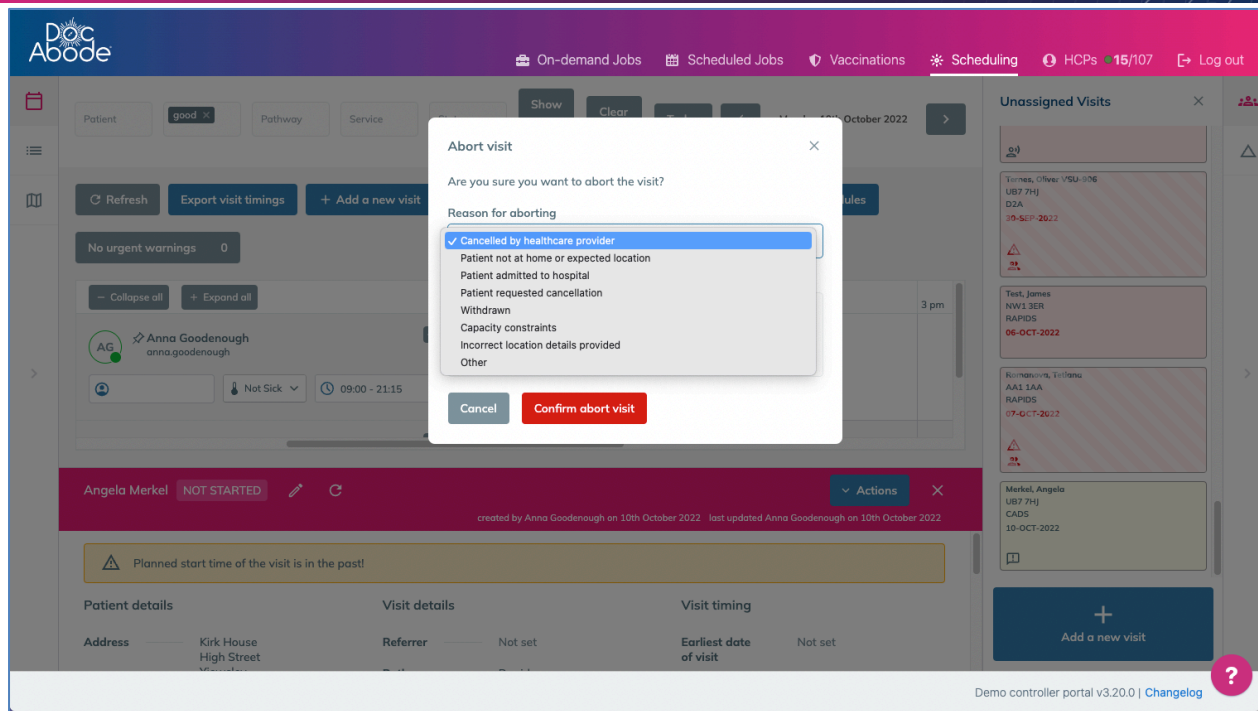
To abort a visit, select option *Cancel* from the Actions menu.



This will pull up the following window



The reason for aborting the visit is selected from a dropdown list, see below. This categorisation will enable analysis of aborted visits at a later date. It is also possible to enter notes as free text, to provide further context.



When the controller presses the *Confirm abort visit* button the visit seems to disappear. However the visit can be re-instated.

Reversing a visit cancellation

By the default, when the controller is presented with visits on any of the views, aborted visits are not displayed. However they are not deleted from the system. Select the *Show more filters* button at the top of the page and then tick *Show aborted visits*.

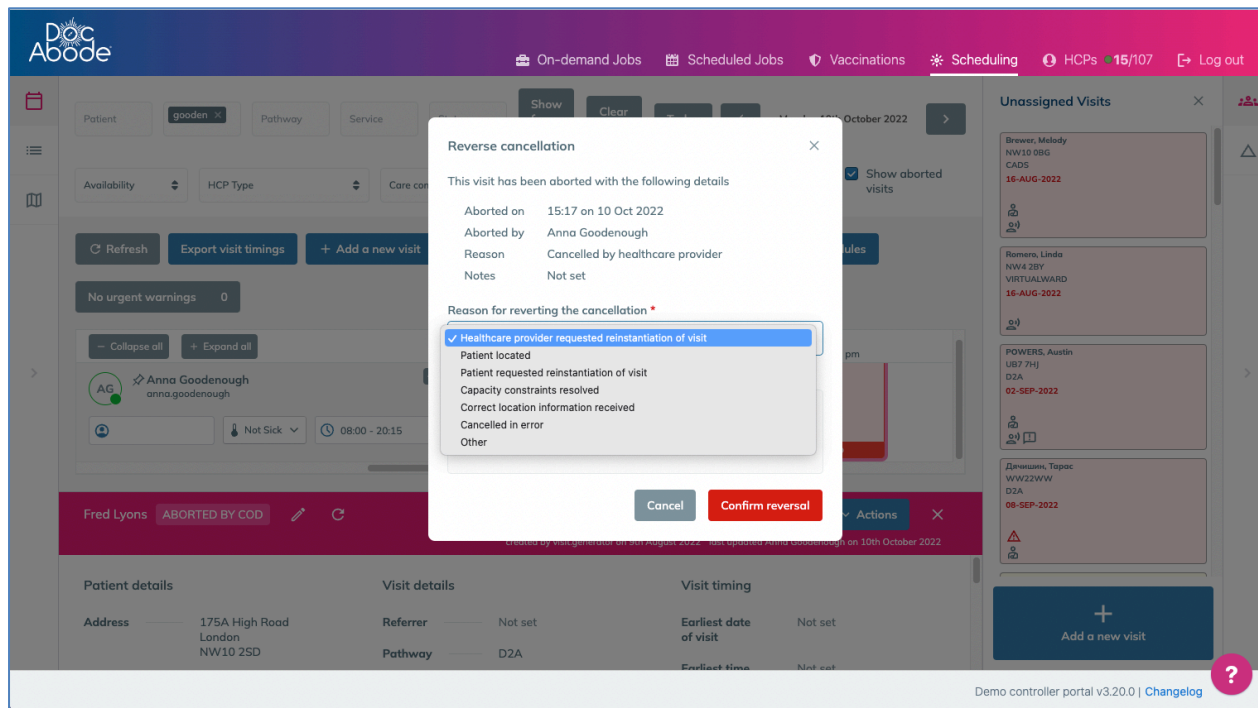
The screenshot shows the Doc Abode Scheduling Controller interface. At the top, there are tabs for On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling, and HCPs (15/107). A red circle highlights the 'Show aborted visits' checkbox, which is checked. Below the calendar, a red banner for 'Angela Merkel' indicates the visit was 'ABORTED BY COD'. The banner includes a timestamp 'created by Anna Goodenough on 10th October 2022' and 'last updated Anna Goodenough on 10th October 2022'. The banner also contains an 'Actions' button. Below the banner, the patient details and visit details are displayed. The patient details include the name 'Angela Merkel', address 'Kirk House High Street Yewlsley West Dravton', and HCP 'Anna Goodenough'. The visit details include the referrer 'Not set', pathway 'Rapids', and earliest date of visit 'Not set'. The visit timing shows the visit was scheduled for 12 pm on Monday 10th October 2022.

Aborted visits are always clearly marked in red, to distinguish them from visits with other statuses, and the banner along the base of the tile will be *ABORTED BY COD*.

When an assigned aborted visit is selected, the action menu will contain the option *Reverse cancellation*.

The screenshot shows the Doc Abode Scheduling Controller interface. At the top, there are tabs for On-demand Jobs, Scheduled Jobs, Vaccinations, Scheduling, and HCPs (15/107). A red circle highlights the 'Show aborted visits' checkbox, which is checked. Below the calendar, a red banner for 'Fred Lyons' indicates the visit was 'ABORTED BY COD'. The banner includes a timestamp 'created by visit generator on 9th August 2022' and 'last updated Anna Goodenough on 9th August 2022'. The banner also contains an 'Actions' button. Below the banner, the patient details and visit details are displayed. The patient details include the name 'Fred Lyons', address '175A High Road London NW10 2SD', and HCP 'Anna Goodenough'. The visit details include the referrer 'Not set', pathway 'D2A', and earliest date of visit 'Not set'. The visit timing shows the visit was scheduled for 03:17 pm on Monday 10th October 2022. A red circle highlights the 'Reverse cancellation' option in the 'Actions' menu.

A window will appear containing a list of reasons for reversing the cancellation and a box for entering notes.



As before, select a reason and enter notes as needed, then press the button *Confirm reversal*. The visit will go back to a *Not started* status.

When an aborted unassigned visit is selected, the *Action* list does not contain the option to reverse the cancellation. Instead, the option *Create follow-up visit* should be used in order to create a new visit. This option will use details copied over from the aborted one.