



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

	🚔 On-demand Jobs		Vaccinations	☆ Scheduling) HCPs •16 /104	[→ Log out
Clear filters			Tod	lay < Thursd	lay 29th September 2022	> 281
C Refresh	Export visit timings +	Add a new visit + A	Administrative time	🛱 Import schedule	es 📄 Export schedu	ules

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

٥	Patient Staff Pathway Service Sta	tus Show m	ore filters Clear	filters			Today <	Wednesday 28th Se	eptember 022 >	181
:=	Nr gent warnings 0		C' Refresh	Export visit timings	+ Add a new visit	+ Administrativ	e time 🗎 Import	schedules 🗎 🛱	Export schedules	^
	- Collapse all + Expand all	7 am	8 am	9 am	10 am	11 am	12 pm	1 pm	2 pm	
	MAN 2 Aldawoud mutaz Aldawoud (2 Urgent Responder) (3 Not Sick V) (3 0800 - 20.15 V)								Pitt, Brad UB7 7HJ CADS	
	✓ Wasim Altar wasim altar ② ▲ Not Sick ✓ ③		Ronaldo, Cristiano UB7 7HJ RAPIDS			Winehouse, Amy UB7 7HJ D2A Â Î			NOT ST	<
			NOT STARTED	Merkel, Angela UB7 7Hj CADS		NOT STARTED	Duck, Doffy UB7 7HJ VIRTUALWARD			
	Ac *Andriy Chalyi andriy.chalyi			Layton, Craig UB7 7HJ D2A	RTED	Kent, Clark UB7 7HJ D2A	NOT STARTED			
	Not Sick 16:00 - 22:00			NOT STARTED		А А NOT ST	ARTED			
	TD. Tetiana Deriugina									

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
 - \circ The choice of calendar view and list view is selected via the icons on the top left

Scheduling Controller 6 Managing single visits.docxLast updated 28-Nov-22



• 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

	oc ode	æ	On-demand Jobs 留 S	Scheduled Jobs 🔹 🕈 Vac	cinations 🔆 Sched	luling () HCPs e15 /107	[→ Log out
⊟	Patient good × Pathway	Service Status	Show Clear Toda more filters Toda	y Konday 10th O	ctober 2022	Unassigned Visits	×
囗	C Refresh Export visit timings + a	Add a new visit + Administra	tive time 🦳 🛱 Import sche	dules 📄 🛱 Export schedu	les	Tarnes, Ofiver VSU-906 U87 7H] D2A 30-5EP-2022	
>	Collapse all + Expand all AG Anna Goodenough anna goodenough AG Ana Goodenough Ana Sick C	09:00 - 21:15 V	0.07 am 11 am	12 pm	1 pm	Markel, Angele U877HJ 06-05 06-0CT-2022 Test, Jomes NV1 JER RAPOS 06-0CT-2022	,
	Angela Merkel UN# SIGNED / C Patient details	Visit details	VI	created by Anna Goodenough	Actions X	Romanova, Tellana AAI IAA RAPIDS 07-0CT-2022	
	Address Kirk House High Street Yiewsley West Drayton UB7 7HJ	Referrer Not se Pathway Rapid: Service 0-1 do	s Ec	rliest date Not set visit rliest time Not set visit	De	+ Add a new visit	ngelog

Scheduling Controller 6 Managing single visits.docxLast updated 28-Nov-22





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

AB	oc ode	🚔 On-demand Job	s 🛱 Scheduled Jobs	🕈 Vaccinations 🐇	Scheduling
⊟	Patient good × Pathway	Service Status Show more filters Clear filters	Today < M	londay 10th October 2022	Unassigned Visits × 22
>	No urgent warnings 0 - Collapse all + Expand all Agg Anna Goodenough anna.goodenough	Add a new visit + Administrative time in 12 pm Herek, Angels US77H] RADE 09:00 - 21:15 V NOT STATED	1 pm	2 pm 3 pm	Model, Angelo GADS 28-587-2022 Immedia UD27H1 CADS UD27H2 UD27H1 DADA 10-587-2022 Immedia Trans, Offwar VSU-506 UD27H1 DADA 10-587-2022 Immedia Trans,
	Angela Merkel NOT STARTED 🥜 C		h October 2022 last updated Anna	Goodenough on 10th October 2022	Romenyver, Terlene AA13AA RAPDS 07-QCT-2022
	Address Kirk House High Street Yiewsley West Drayton UB7 7HJ	Referrer Not set Pathway Rapids Service 0-1 day response	Earliest date of visit Earliest time of visit	Not set	Add a new visit

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.

Ab	oc ode		🚔 On-demand Jobs	聞 Scheduled Jobs	Vaccinations	☆ Scheduling	Q HCPs 15 /107	
8		Latest time of visit					sits	× 281
	Patient	Planned date of visit *						
.=		10/10/2022					6	
	C Refresh	Planned start time *	Planned duration *					
	No urgent warnir	12 : 00	1 : 00					
		Expected end time						
	– Collapse all	Pre-visit notes						
	AG Anna anna.g	Permanent address: 1, Albion Street, Leeds, LS1 6AB						
>	٢							
		Staffing requirements *						
		1	\$					
	Angela Merkel	Staff member #1						
		Anna Goodenough (available on planned date)	· ·					
	Patient details	Status Unassigned						
	Address	ondolighed					+	
		Save					a new visit	
						0		?
						Demo con	troller portal v3.20.0 Cha	ngelog

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

Changing visit status

changes and press Save.

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



Doc Abode		🚔 On-dema	and Jobs 🛗 Scheduled Jol	os 🜓 Vaccinations 🔆	Scheduling
Patient	good × Pathway	Service Status Show more filters	Clear filters Today <	Monday 10th October 2022	ين
C Refresh		ld a new visit + Administrative time	🛱 Import schedules 🗮	Export schedules	Tomes, Oliver VSU-036 U82741 204597-2022
	nna Goodenough nna.goodenough	12 pm Merical An UB2 7HJ UB2 7HJ UB	1 pm	2 pm 3 pm	Test, Jomes NVL3 BR RAPDS 06-OCT-2022 ANDS ANDS 07-OCT-2022 AL AL 2.
Angela Mer	cel NOT STARTED 🧷 C	created by Anna Goodenou Visit details	igh on 10th October 2022 last updated A Visit timing	Actions X nna 6 deno View full details Cancel Create follow-up visit	Merkel, Angele U877Hj CADS 10-0CT-2022
Address –	Kirk House High Street Yiewsley West Drayton UB7 7HJ	Referrer Not set Pathway Rapids Service 0-1 day response	Earliest date of visit Earliest time of visit	Net set	+ Add a new visit

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

Ab	óc ode	🚔 On-der	mand Jobs 🛛 🛱 Scheduled Jobs	🕈 Vaccinations	Scheduling	
₿	Patient good × Pathwe	y Service Show	Clear , , , , , , , , , , , , , , , , , , ,	October 2022	Unassigned Visits ×	:&:
	C Refresh Export visit timings	Please select new status	5	¢	Ternes, Oliver VSU-306 U877Hj 102A 10-SEP-2022	
		U077* RAPID: 09:00 - 21:15	Angelo 1) 5 NOT STARTED	2 pm 3 pm	A Janes No. 38H RANDS 06-0CT-2022 At 1AA RANDS 07-0CT-2022 At 1AA RANDS 07-0CT-2022	
	Angela Merkel NOT STARTED	C created by Anna Goode Visit details	nough an 10th October 2022 last updated Anna G Visit timing	Actions X		
	Address Kirk House High Street Yiewsley West Drayton UB7 7HJ	Referrer Not set Pathway Rapids Service 0-1 day respon	Earliest date of visit Earliest time	Not set Not set	+ Add a new visit	?
					Demo controller portal v3.20.0 Changelog	

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.





	je Je			🚔 On-demand Jobs	Scheduled Jobs	Vaccinations	* Scheduling	• HCPs •15/107	
	Patient	od × Pathway	Service	Show Clear		October 2022	Un	assigned Visits	×
			Change	visit status		×	2		
	C Refresh		d a new visit	D		lules	UB1 D2/	SEP- 20 22	
		+ Expand all oodenough idenough	0	12 pm Merkel, Angelo UB7 7HJ RAPIDS	1 pm	z pm :	3 pm NW	, james 1 35R 105 DCT-2022	
	٢	Not Sick V 🕚 05	:00 - 21:15 🗸	D NOT STARTED			AA: RAS 07-	DCT- 20 22	
	Angela Merkel 🕴	NOT STARTED 🧨 C	crec	ted by Anna Goodenough on 10th Oct	ober 2022 - last updated Anna (Actions Goodenough an 10th October 2		kel, Angela ' 7HJ	
F	Patient details		Visit details		Visit timing				
,	Address	Kirk House High Street Yiewsley West Drayton		Not set Rapids	of visit	Not set		+ Add a new visit	٦

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.



Ab	oc ode	📾 On-demand Jobs 🛛 🛗 Scheduled	Jobs 🜓 Vaccinations 🌸 So	theduling
₿	Patient good X Pathway Service Status	Show more filters Today <	Monday 10th October 2022	Unassigned Visits × 2
即	C Refresh Export visit timings + Add a new visit + Admi No urgent warnings 0	inistrative time 🗎 Import schedules	🛱 Export schedules	Terres, Oliver VSU-006 UB7 771 D2A 39-557-2822
>	Collapse all + Expand all Ag Anna Goodenough ana.goodenough B Not Sick O 09:00 - 21:15	12 pm 12 pm 1 pm	2 pm 3 pm	Test, James NVI 3 281 DAM05 D6-CCT-2022 Romework, Tridenu AA3 DAPDS 07-0CT-2022 A
	Angela Merkel NOT STARTED C creat	ted by Anna Goodenough on 10th October 2022 lest updat	Actions X ed Anna Gooder View full details Cancel Create follow-up visit	Merkel, Angelo UB7 7H1 CAOS 10-OCT-2022
	High Street	Visit timing Not set Earliest date of visit	Change and S	+ Add a new visit
				Demo controller portal v3.20.0 Changelog

This will pull up the following window

Show Clear Or Not wisit Abort visit Abort	Ab D	óc óde	🚔 On-demand Jobs 🛚 🛱 Sched	uled Jobs 🔹 Vaccinations 🔆 S	cheduling	
Are you sure you want to abort the visit? No urgent warnings 0 Cancelled by healthcare provider Not Sick v @ 0800 - 2115 Cancel Confirm abort visit	8	Patient good x Pathway Service	Clear _ ,		Unassigned Visits ×	2:
		No urgent warnings 0 - Collapse all + Expand all Anna Goodenough anna goodenough	Are you sure you want to abort the visit? Reason for aborting Cancelled by healthcare provider Notes	ules ¢	Stores, Olive: VSD-006 UB2.74j DDA PD-SEP-2022 A Max Test, Jonase NV4.3 BR RAPDS 06-OCT-2022 Revenue-revert RAFDS A45.3AA RAPDS	>
Angelo Merkel NOT STARTED C C C C C C C C C C C C C C C C C C C		Angela Merkel NOT STARTED C Angela Merkel NOT STARTED C Patient details Visit details Visit details Address Kirk House Referrer	talls Visit tin Not set Earliest	updated Anna Goodenough on 10th October 2022	A Veriest Argelie 197701 1905 19-0CT-2022 1 4 Add a new visit	

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.



Ab	oc ode	🚔 On-demand Jobs	🛱 Scheduled Jobs	Vaccinations	* Schedulin	• HCPs • 15 /107	[→ Log	
⊟	Patient good × Pathway Service	Show Clear Abort visit		October 2022		nassigned Visits	×	:گ: ا
	C Refresh Export visit timings + Add a new vis	Are you sure you want to abort the vis Reason for aborting	sit?	lules	U D 31	rmes, Ofwer VSU-906 87 7HJ 2A -SEP-2022		
	No urgent warnings 0 Collopse all + Expand al Collopse al Collopse al Collopse al Collopse al Collopse al Collopse	Patient not at home or expected location Patient admitted to hospital Patient requested cancellation Withdrawn Capacity constraints Incorret location details provided Other Cancel Confirm abort visit			3 pm	A at, Jones At, Jones At, Jones Hand Horr. At Jone At Jone At Jone At Jone At Jone At Jone At Jones At		
	Angela Merkel NOT STARTED 🖋 C	created by Anna Goodenough on 10th O	ctober 2022 last updated Anna G	• Actions	X M	erket, Angela 37 7H ADS OCT-2022		
	Planned start time of the visit is in the past Patient details Visit	details	Visit timing					
	Address Kirk House Refer			Not set	Demo	+ Add a new visit	angelog	?

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*.



Ab	öc öde	盘 On-demand Jobs 箇 Scheduled Jo	bs 🜒 Vaccinations	Scheduling O HCPs •15/107	[→ Log out
Ħ	Patient good × Pathway Service Status	Show fewer filters Today <	Monday 10th October 2022	Unassigned Visits	×
:=		filters		27	
	Availability 🖨 HCP Type 🗢 Care complexit 🖨	Transport require 🖨 Warning	Show aborted visits	Ternes, Offwer VSU-906 UB7 7HJ D2A 30-SEP-2022	
	C Refresh Export visit timings + Add a new visit + Ad	Iministrative time 🛱 Import schedules 🛱	Export schedules	▲ 2.	
	No urgent warnings 0		• 0	Test, James NW13ER RAPIDS 06-0CT-2022	
>	Collopse all + Expand all Arg	12 pm 1 pm Merkel, Angelo UB77H) RAPIDS	2 pm P p		,
	Angela Merkel ABORTED BY COD 🧨 C	eated by Anna Goodenough on 10th October 2022 last updated A	 Actions Actions Anna Goodenaugh on 10th October 2023 	10-0CT-2022	
	Patient details Visit details	Visit timing			
	Address Kirk House Referrer High Street Yiewsley Pathway West Dravton	Not set Earliest date of visit Rapids	Not set	+ Add a new visit	
			0_000	Demo controller portal v3.20.0 Change	elog ?

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*.

ode [.]		🚖 On-dema	and Jobs 🖽	Scheduled Job	s 🜓 Vacci	nations 🔆 🔆 Sch	eduling O F	ICPs •15/107	[→ Log	g out
Patient gooden × Pathway	Service Status	Show fewer	Clear filters To	day <	Monday 10th Octo	ober 2022 >	Unassigned	Visits	×	
		filters					Brewer, Melody NW10 0BG CADS			
Availability 🖨 HCP Type	Care complexit \$	Transport require	Warning		÷ 🔽	Show aborted visits	16-AUG-2022			
						_	୍ଥି ବ୍ର			
C Refresh Export visit timings	+ Add a new visit + A	dministrative time	🛱 Import so	hedules 🗎 🛱 🛙	Export schedule	5	Romero, Linda NW4 2BY			
No urgent warnings 0							VIRTUALWARD 16-AUG-2022			
				• 03:17			왕			
- Collapse all + Expand all	1 pr	n 2	2 pm	3 pm	4 pm		POWERS, Austin UB7 7HJ	1		
AG AG anna.goodenough	•			NW10 250 DZA	0		D2A 02-SEP-2022			
Not Sick ~	③ 08:00 - 20:15 ∨						යි දුමු []			
					BORTED BY COD		Дячишин, Тара	c		
					_	_	WW22WW D2A 08-SEP-2022			
Fred Lyons ABORTED BY COD 🧨	G					ctions X				
		created by visit.gene	rator on 9th August	2022 last updated An		full details	â			
Patient details	Visit details			Visit timing		te follow-up visit				
Address 175A High Road	Referrer	Not set		Earliest date of visit	Not set		Δ	+ dd a new visit		
NW10 2SD	Pathway	D2A		Farliest time	Not set					?





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

Ab	óc ode	🚔 On-demand Jobs 🛗 Scheduled Jobs 🌓 Vaccinations 💥 Scheduling 💽	HCPs □15 /107
	Availability + HCP Type C Refresh Export visit timings + Ad No urgent warnings 0 - Collapse all + Expand all Age Anna Goodenough anna goodenough	This visit has been aborted with the following details Carecor This visit has been aborted with the following details Aborted on 15:17 on 10 Oct 2022 Aborted by Anna Goodenough Reason Cancelled by healthcare provider Notes Not set Reason for reverting the cancellation * V Healthcare provider requested reinstantiation of visit Patient located Patient requested reinstantiation of visit Carecor On - 20:15 On - 20:15 Correct location information received Cancelled in error Other	
	Fred Lyons ABORTED BY COD 🖋 C Patient details Address 175A High Road London NW10 25D	Concel Confirm reversal Actions X Center by watgewood of our August 2022 Actions X Visit details Visit timing Referrer Not set of visit Pathway D2A Engliset time	er + Add a new visit
		Demo controller	portal v3.20.0 Changelog

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.