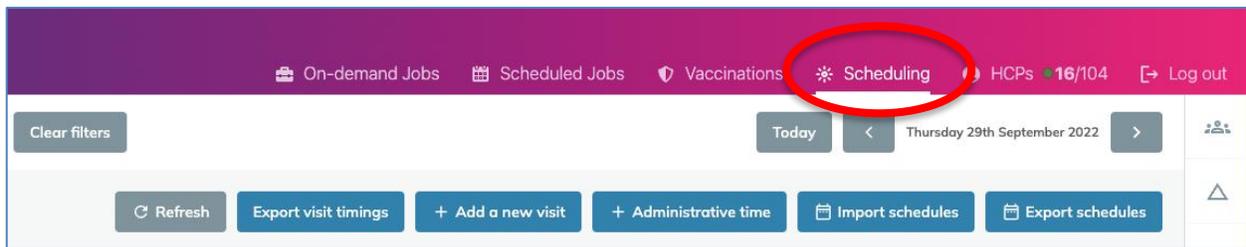


# Scheduling System – Controller Functions

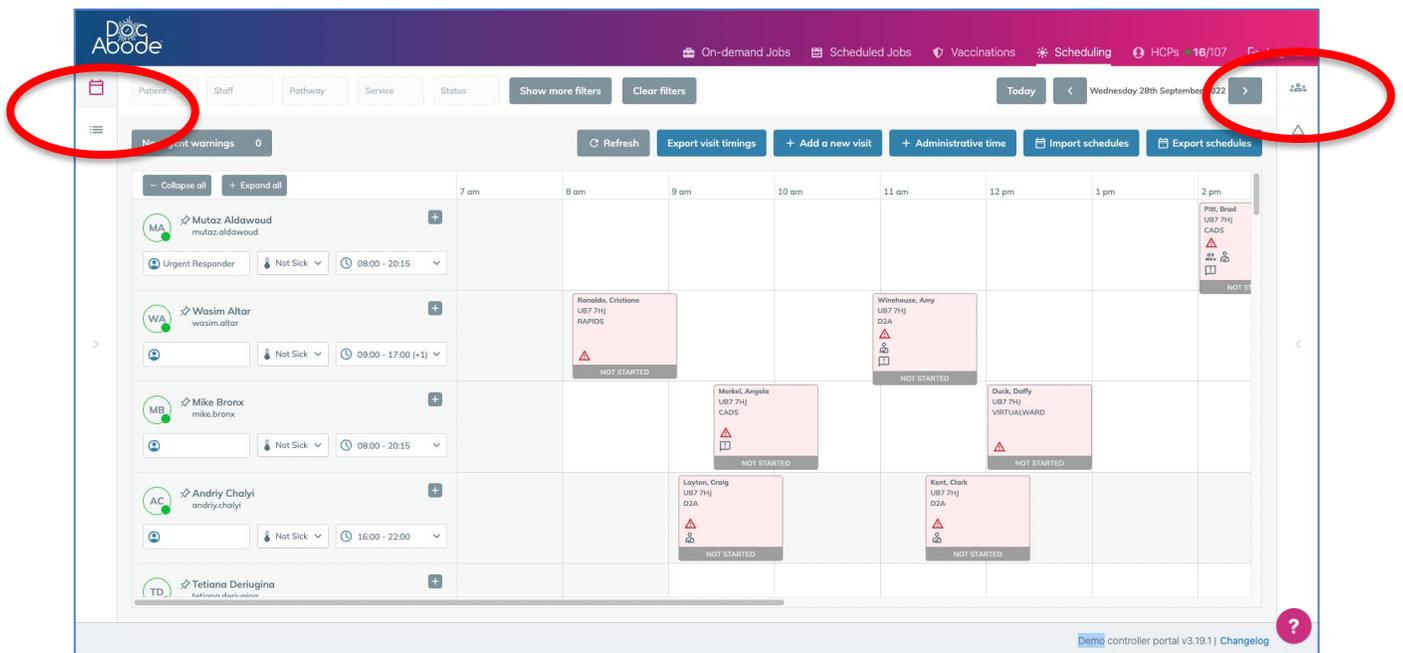
## Managing single visits

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 as a COD <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

- Grid 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 grid 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.

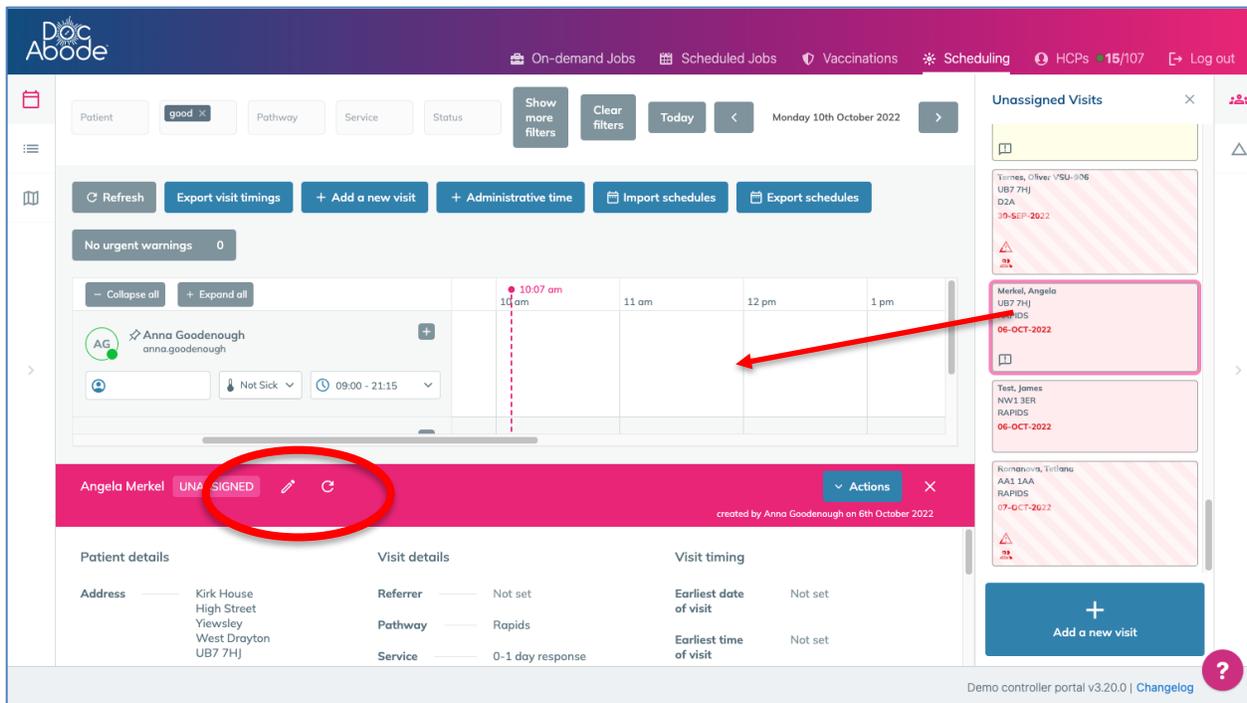
In essence, the controller can do one of four main things to a visit:

- 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

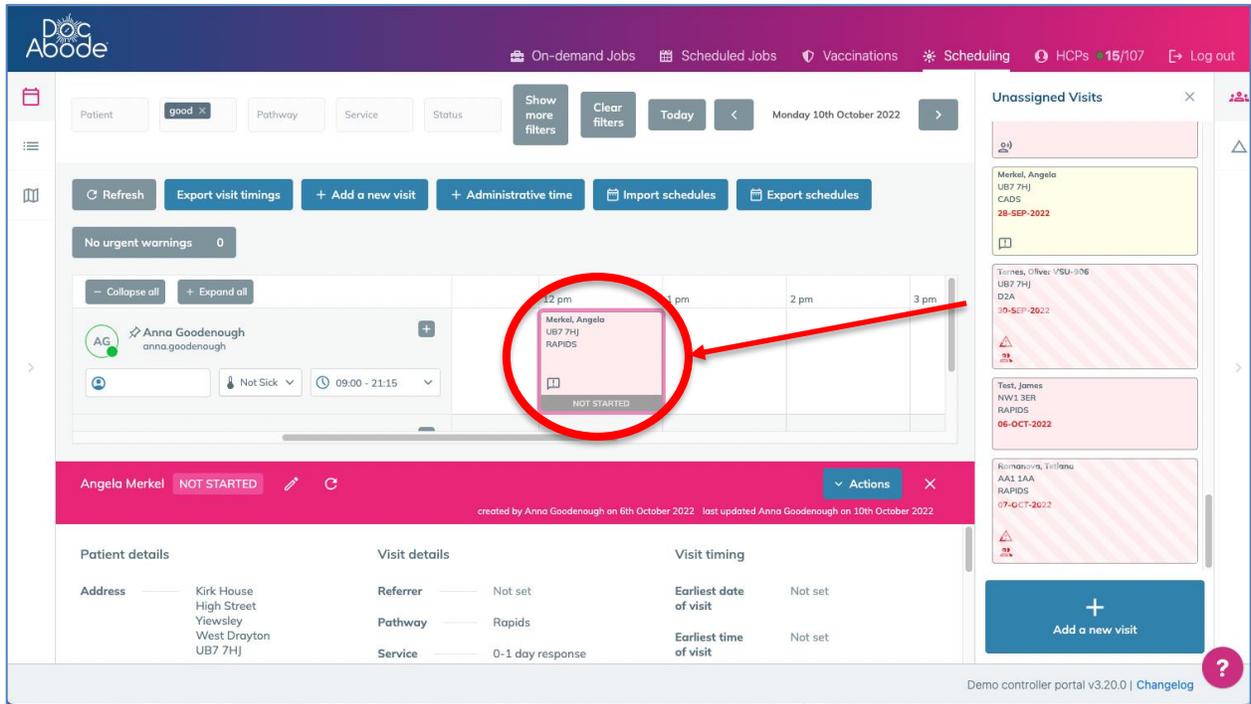
### Assigning a visit to an HCP

There are two ways to do this

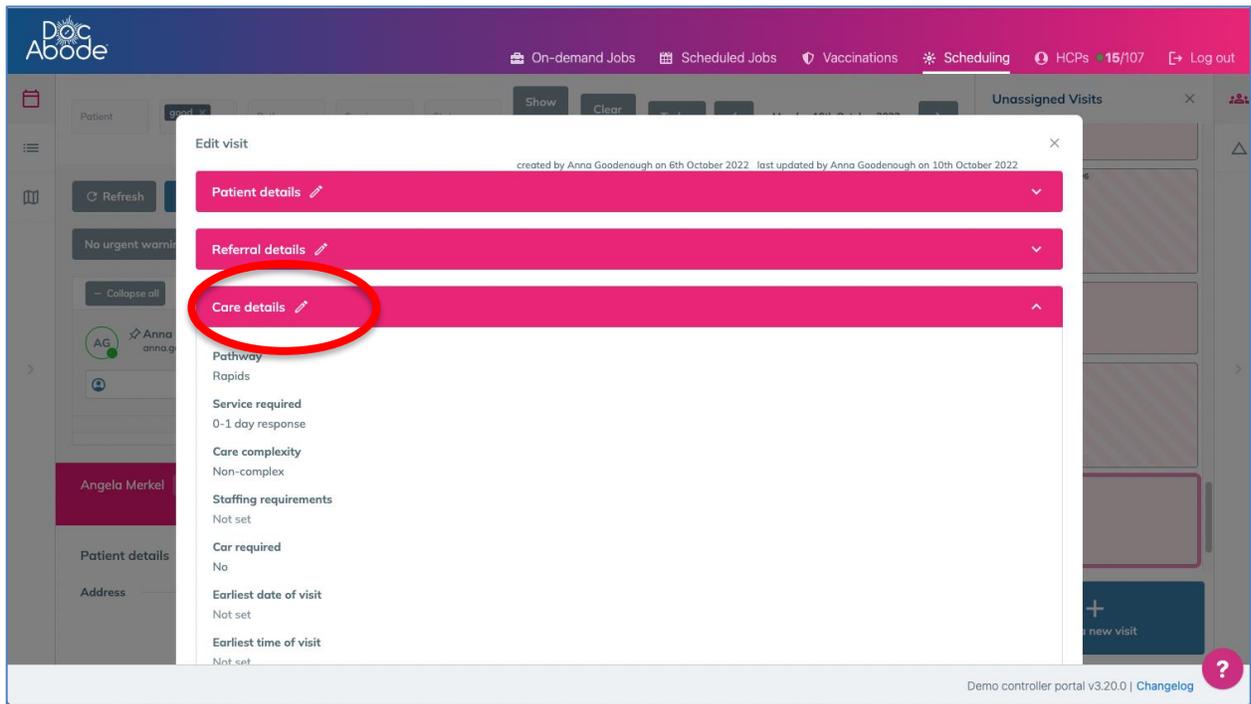
- Using drag and drop from the unassigned visits pane to the grid view. This is an easy and intuitive way to assign visits and to change the time. Note the visit can also be dragged from the HCP's swim lane to another HCP, a different time and even dragged back to the unassigned visits list.
- Going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



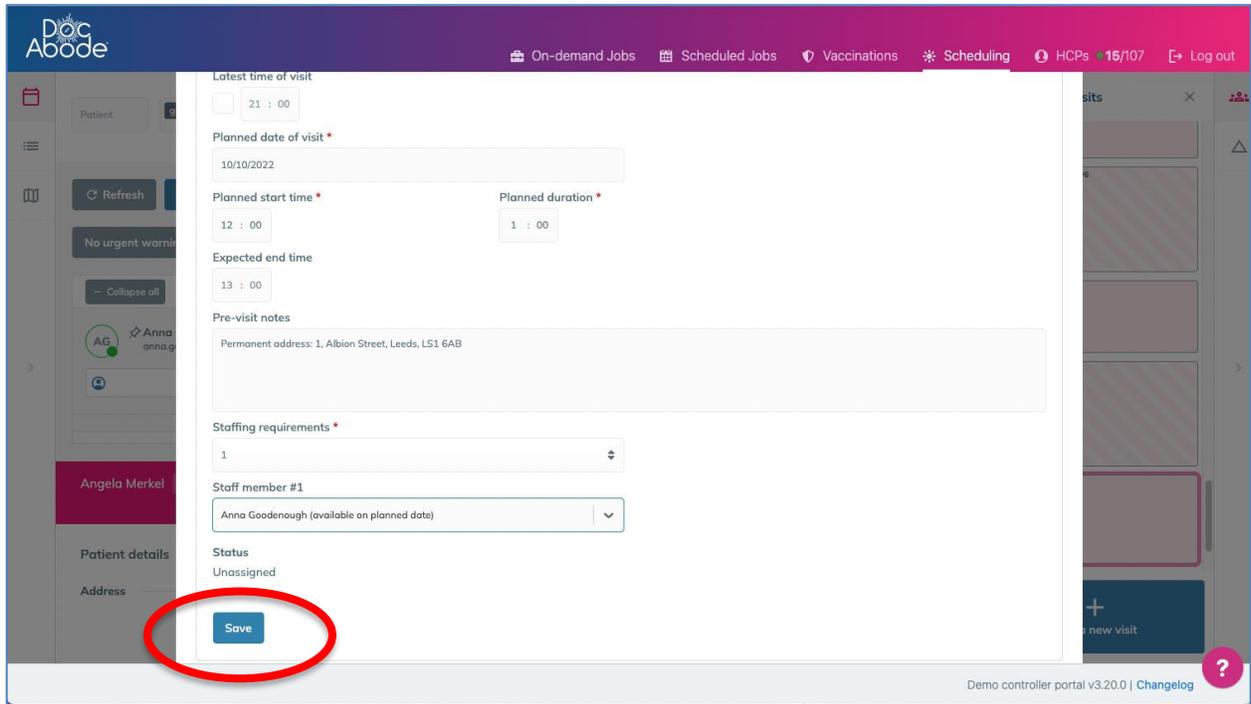
In the screenshot below the visit has been dragged using the mouse



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 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.

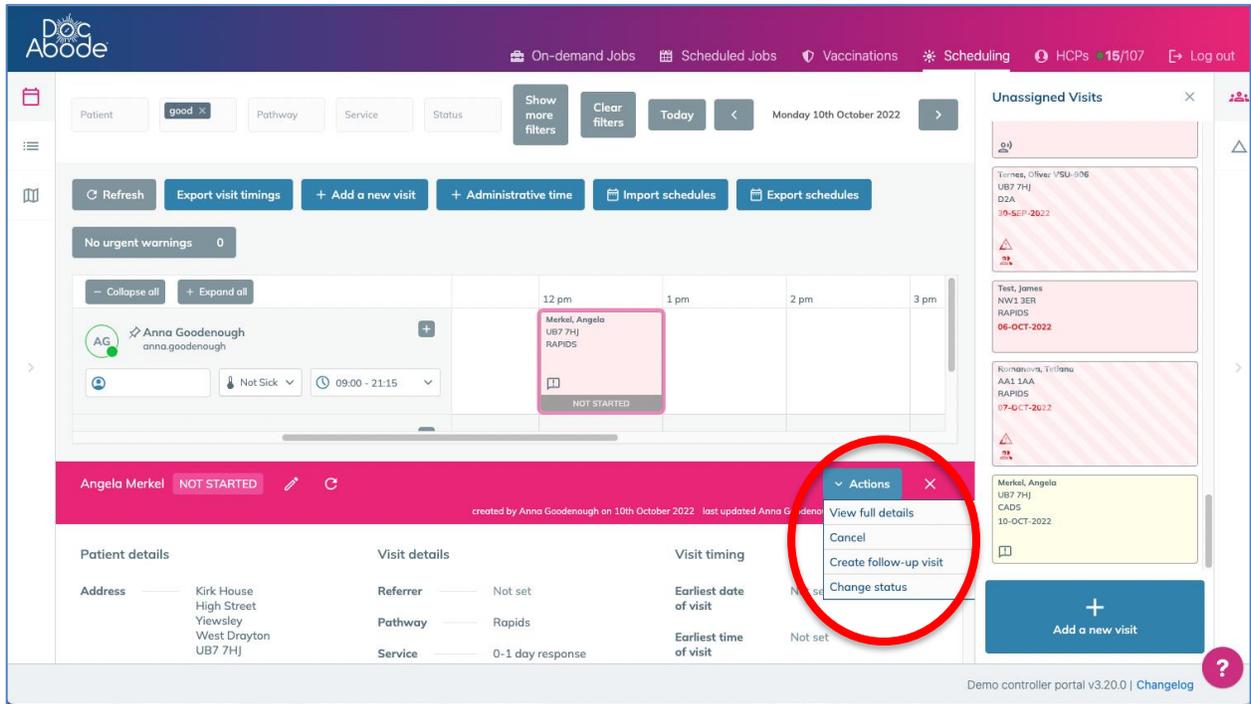
### Changing visit details

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.

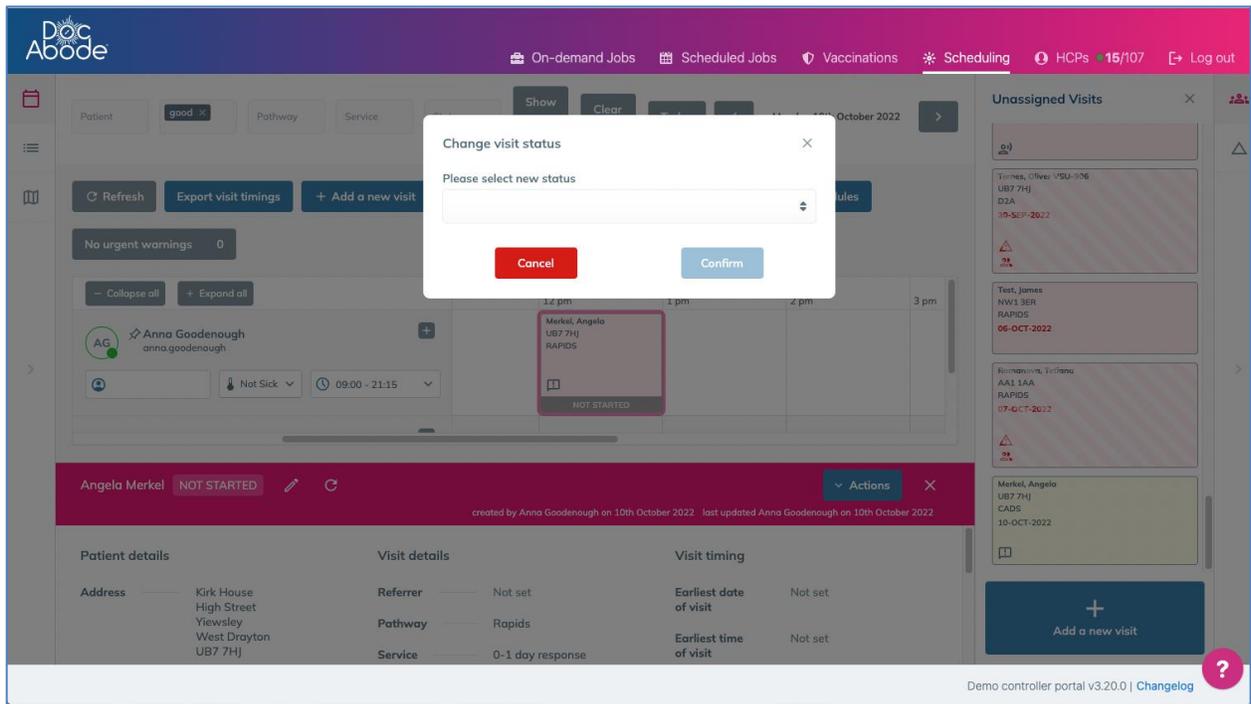
Simply select the visit, press the pencil icon on the section to be changed, make the required changes and press **Save**.

### Changing visit status

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



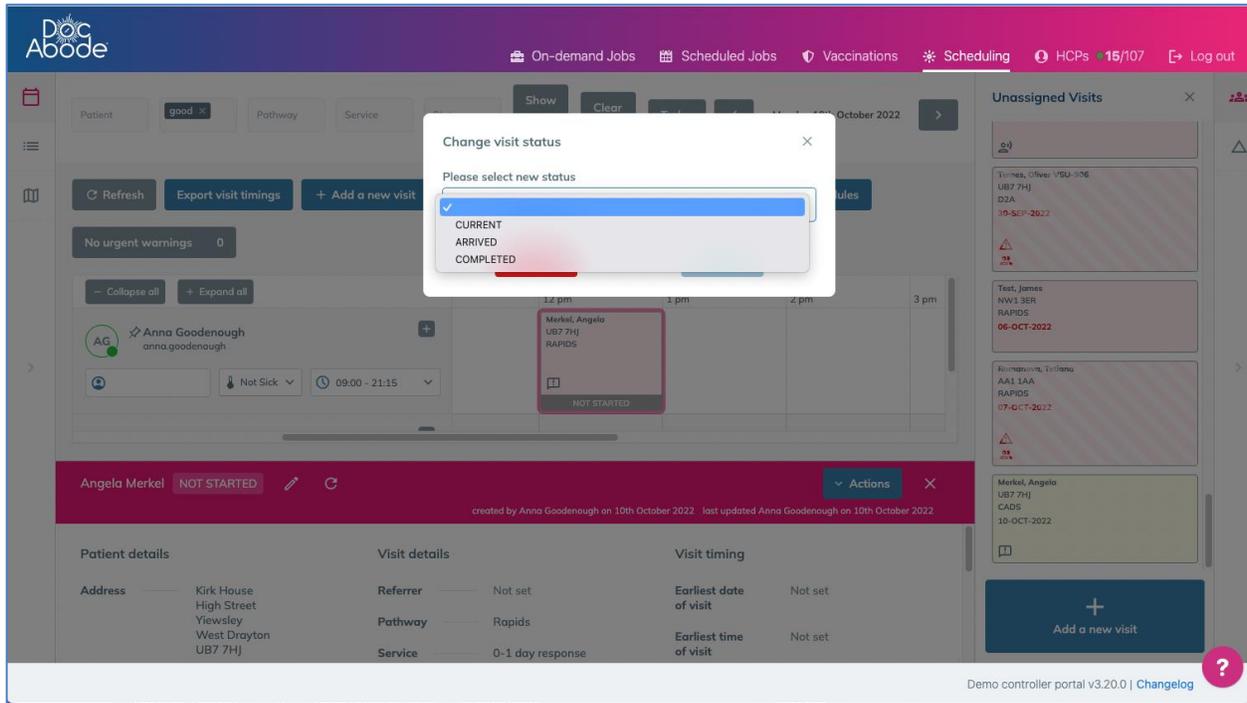
Pressing the Action button will result in a drop-down list of context-sensitive actions that can be made for the visit. Selecting the *Change status* option will present the following window



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.

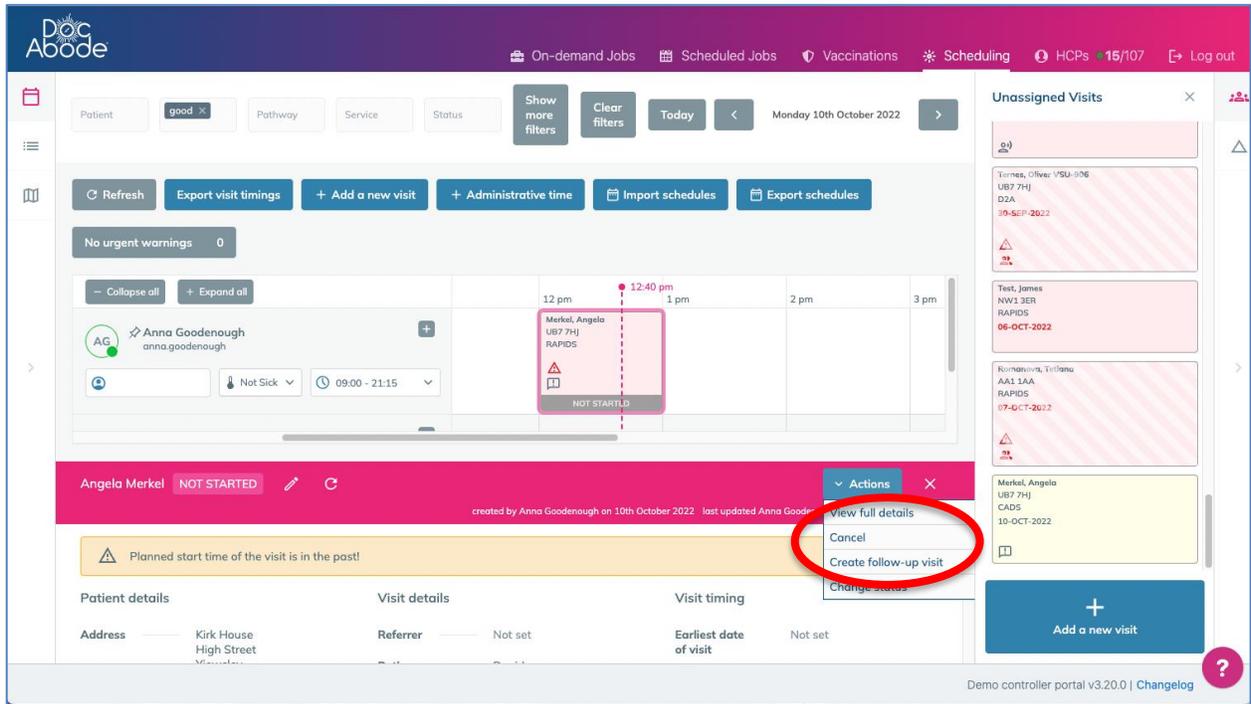
Note it is also possible to enter actual start and end time of this visit in this window, for convenience.



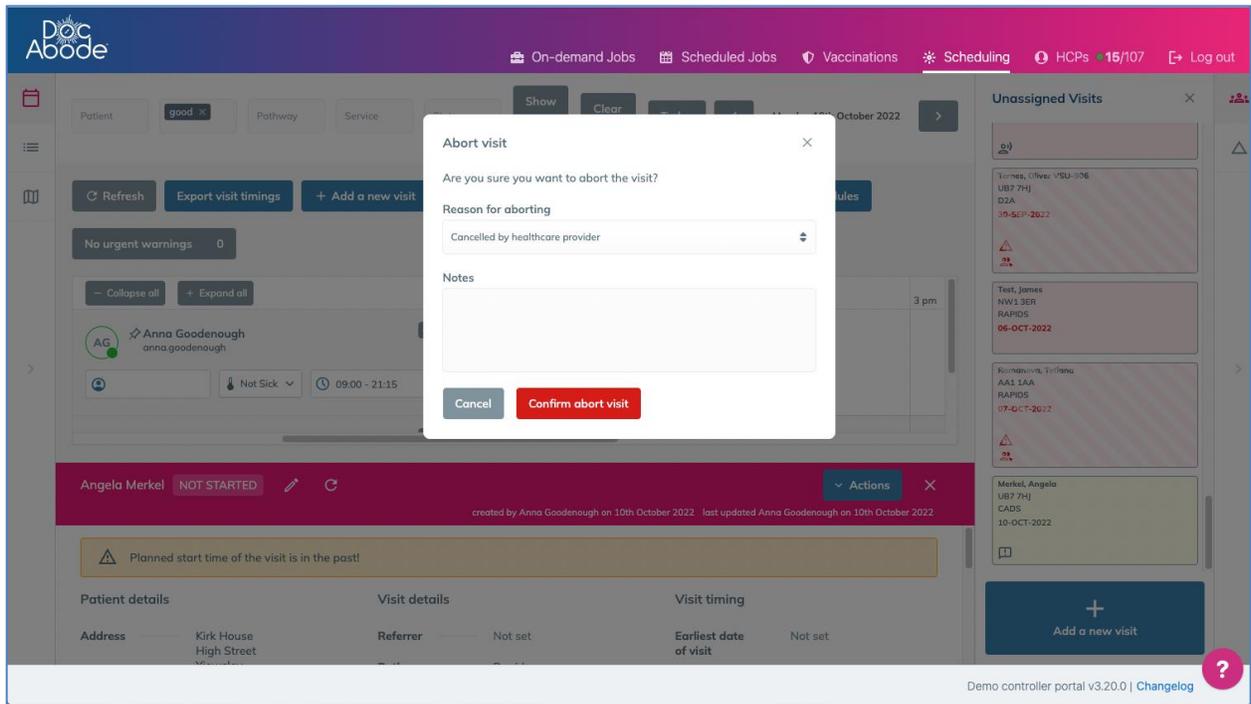
## Aborting a visit, and reversing that if needed

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.

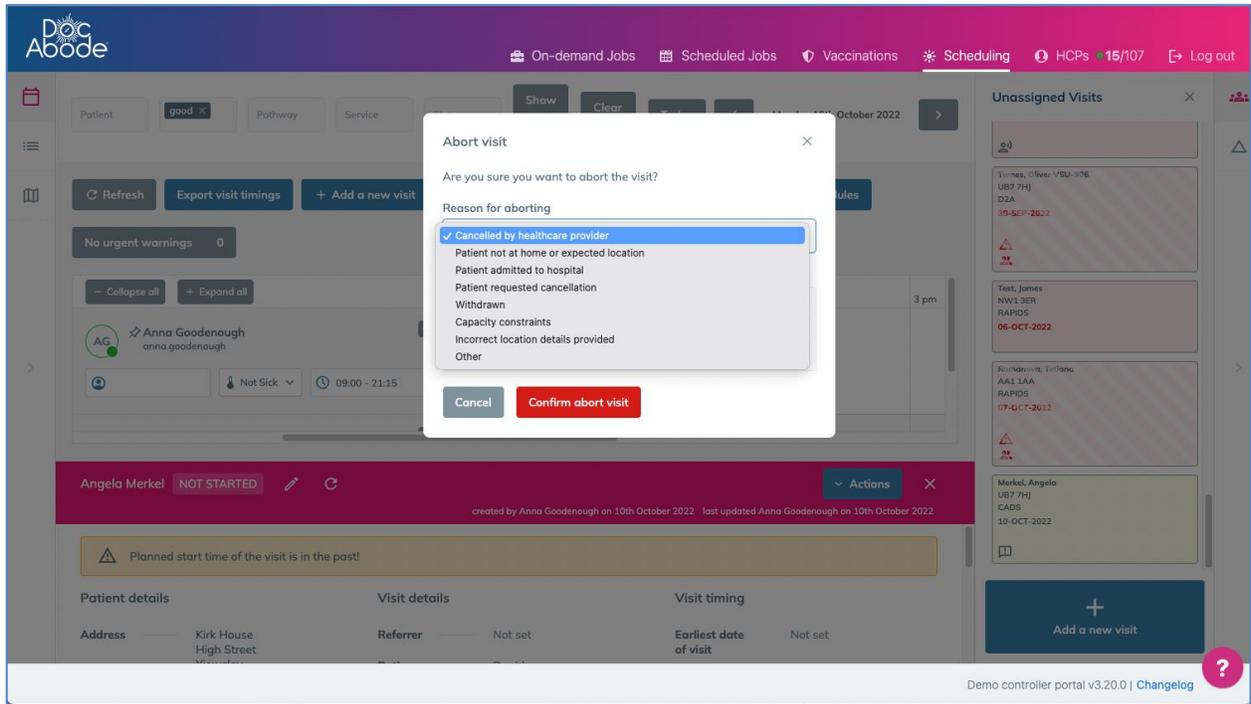
To abort a visit, select option *Cancel* from the Actions menu.



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*.

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

Monday 10th October 2022

Show aborted visits

Refresh | Export visit timings | Add a new visit | Administrative time | Import schedules | Export schedules

No urgent warnings 0

Anna Goodenough (HCP) | 09:00 - 21:15

12 pm | 1 pm | 2 pm | 03:00 pm

Merkel, Angela (Patient) | UB7 7HJ | RAPIDS | ABORTED BY COD

Angela Merkel | ABORTED BY COD | Actions

created by Anna Goodenough on 10th October 2022 | last updated Anna Goodenough on 10th October 2022

Patient details		Visit details		Visit timing	
Address	Kirk House High Street Yiewsley West Dravton	Referrer	Not set	Earliest date of visit	Not set
		Pathway	Rapids	Earliest time	Not set

Unassigned Visits

- Ternes, Oliver | VSLU-906 | UB7 7HJ | D2A | 09-SEP-2022
- Test, James | NW1 3ER | RAPIDS | 06-OCT-2022
- Romanova, Tatiana | AA1 1AA | RAPIDS | 07-OCT-2022
- Merkel, Angela | UB7 7HJ | CADS | 10-OCT-2022

Demco controller portal v3.20.0 | Changelog

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*.

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

Monday 10th October 2022

Show aborted visits

Refresh | Export visit timings | Add a new visit | Administrative time | Import schedules | Export schedules

No urgent warnings 0

Anna Goodenough (HCP) | 08:00 - 20:15

1 pm | 2 pm | 3 pm | 4 pm

Lyons, Fred (Patient) | NW10 2SD | D2A | 03:17 pm | ABORTED BY COD

Fred Lyons | ABORTED BY COD | Actions

created by visit.generator on 9th August 2022 | last updated Anna Goodenough on 10th October 2022

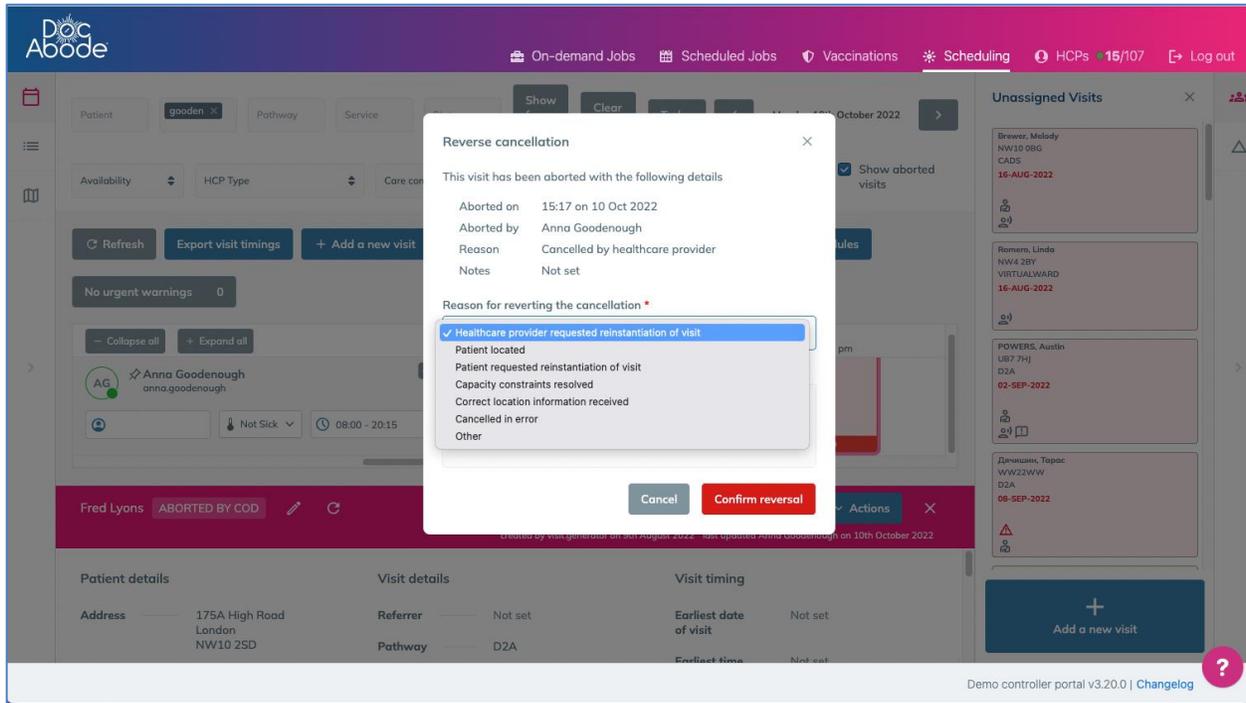
Patient details		Visit details		Visit timing	
Address	175A High Road London NW10 2SD	Referrer	Not set	Earliest date of visit	Not set
		Pathway	D2A	Earliest time	Not set

Unassigned Visits

- Brewer, Melody | NW10 0BG | CADS | 16-AUG-2022
- Romero, Linda | NW4 2BY | VIRTUALWARD | 16-AUG-2022
- POWERS, Austin | UB7 7HJ | D2A | 02-SEP-2022
- Демченко, Тарас | WW23WVW | D2A | 08-SEP-2022

Demco controller portal v3.20.0 | Changelog

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.