

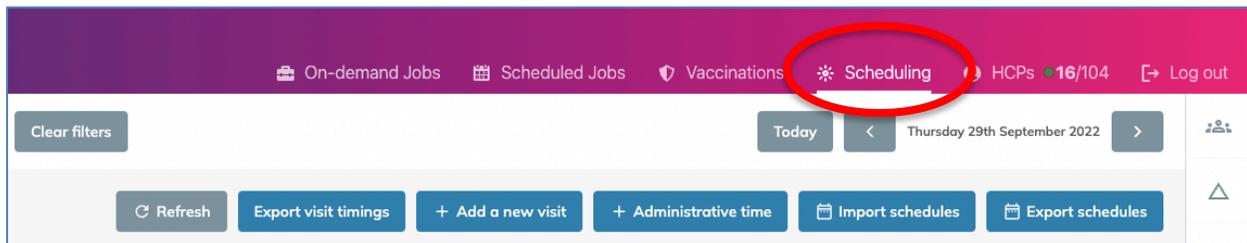
Scheduling System – Controller Functions

Managing double-up visits

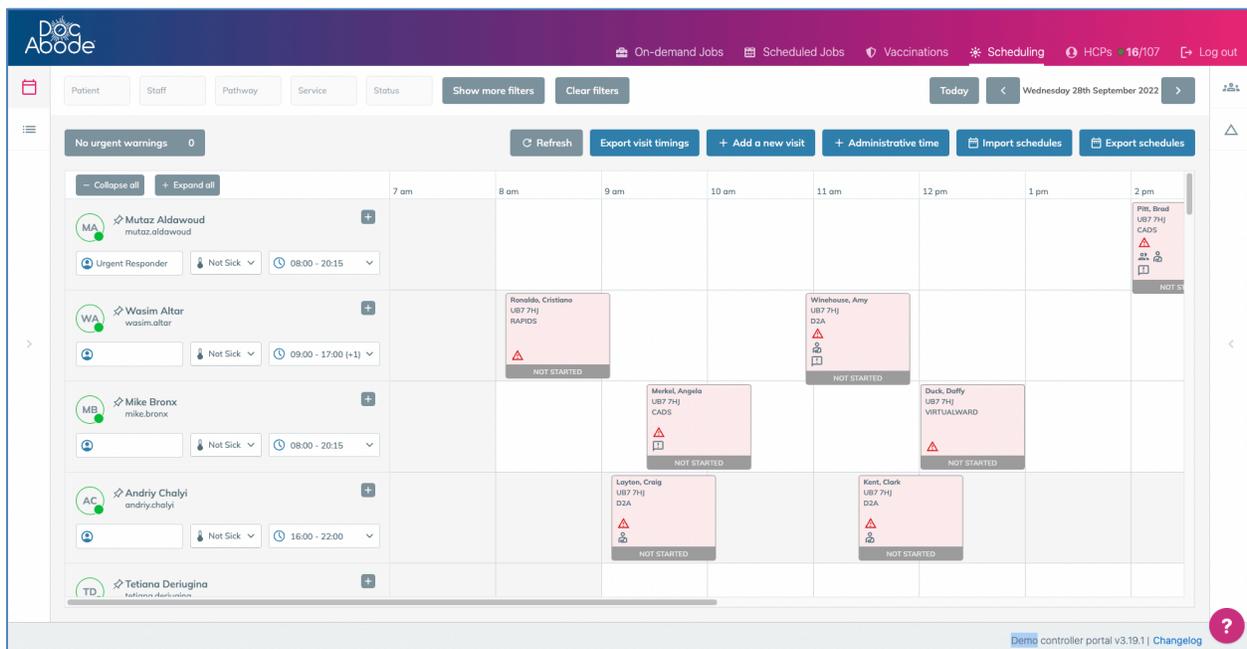
This document describes how to manage visits that have two HCPs tasked to carry this out, commonly known as double-ups.

A separate guide describes how to manage single visits and should be read before this guide.

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.



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

- Add a double-up visit
- Change a single visit to a double-up
- Change one of the HCPs in the pair
- Change a double-up to a single visit

Additional functionality such as updating other data about the patient, referral and care details and using actions to change status are all the same as for single visits, please refer to that user guide for details.

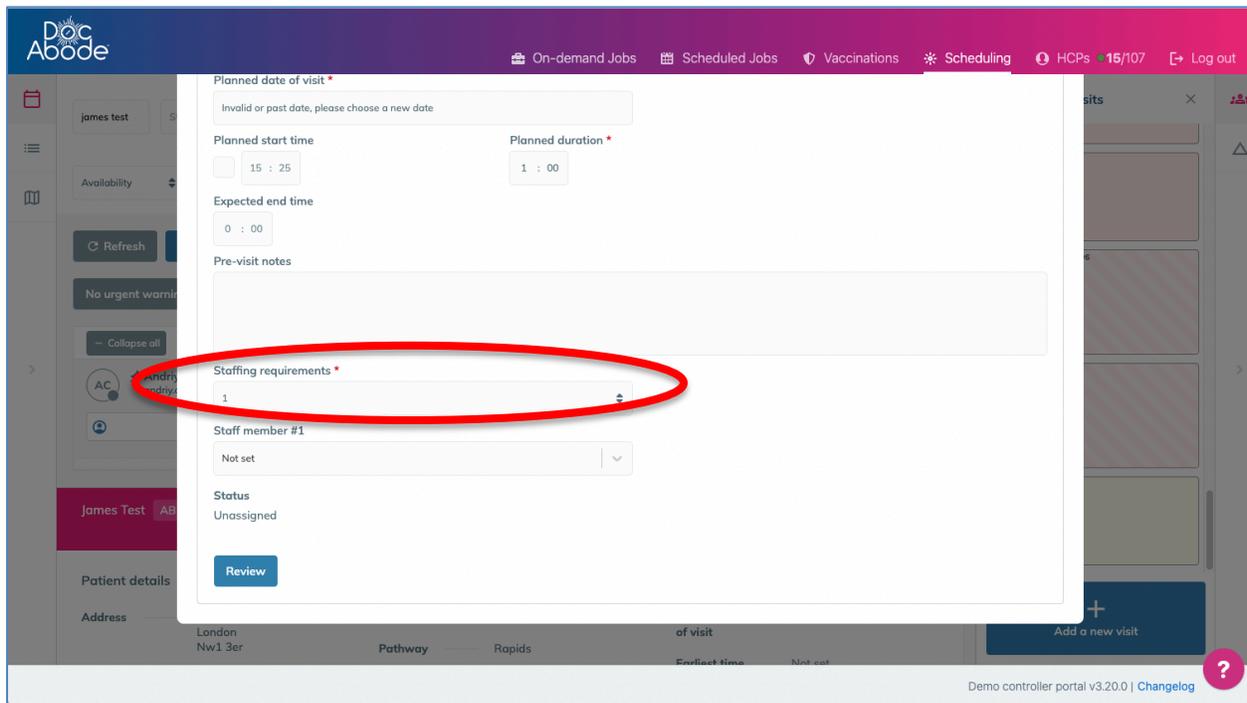
Adding a double-up visit

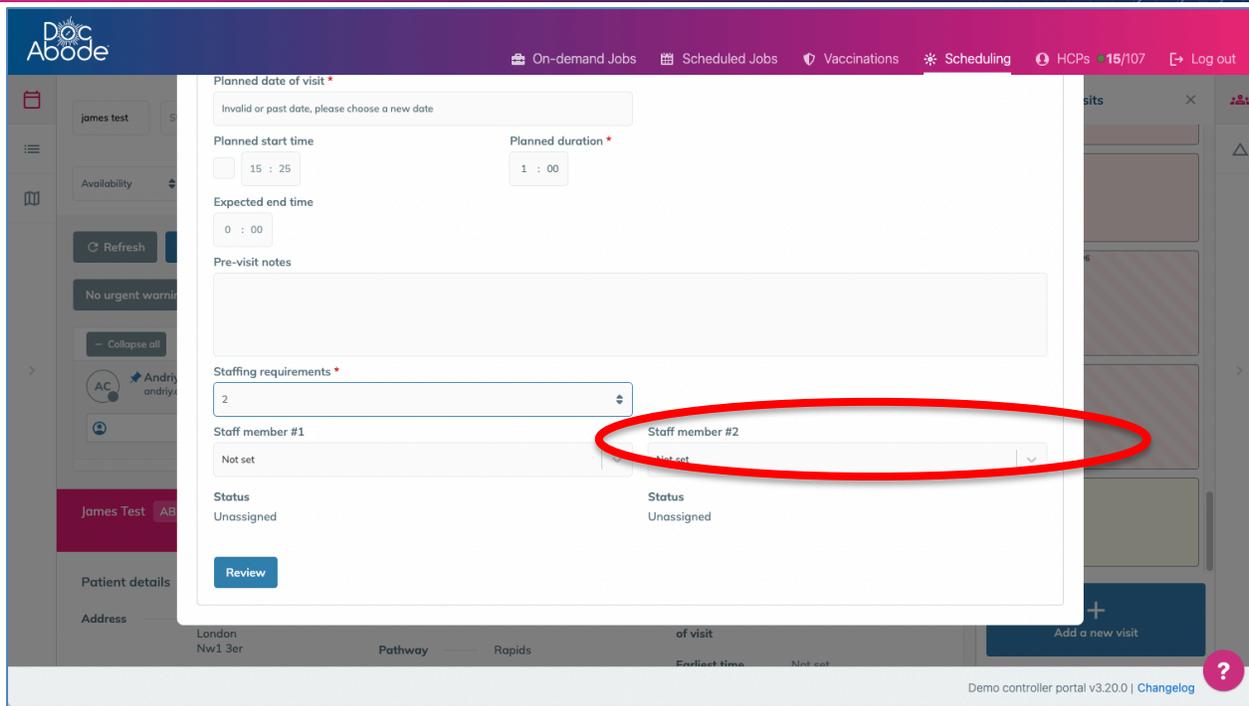
A double-up visit is added in the same way as a single visit: it can be added

- from a referral,
- via a lookup or
- as a follow-up.

In all cases when the full visit details are presented the final section on Care details needs to specify that it is a double-up visit.

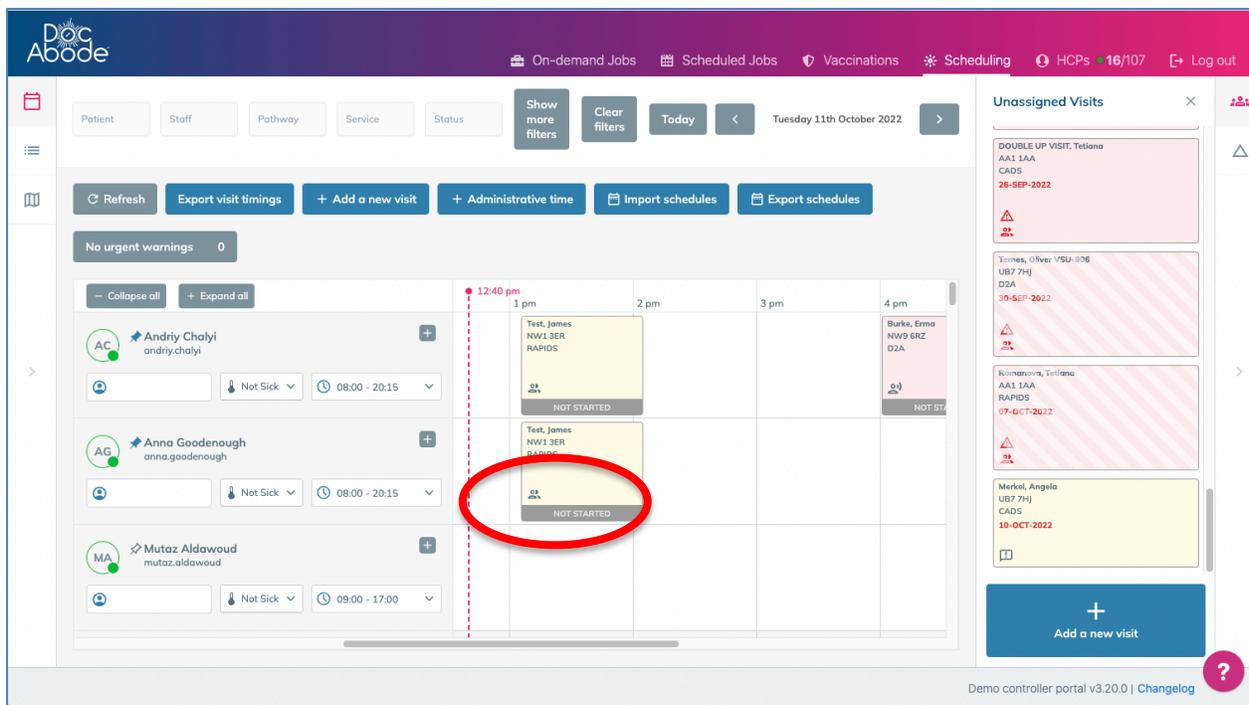
The default setting is labelled Staffing requirements and is set to 1. Select the drop-down list and change this to 2



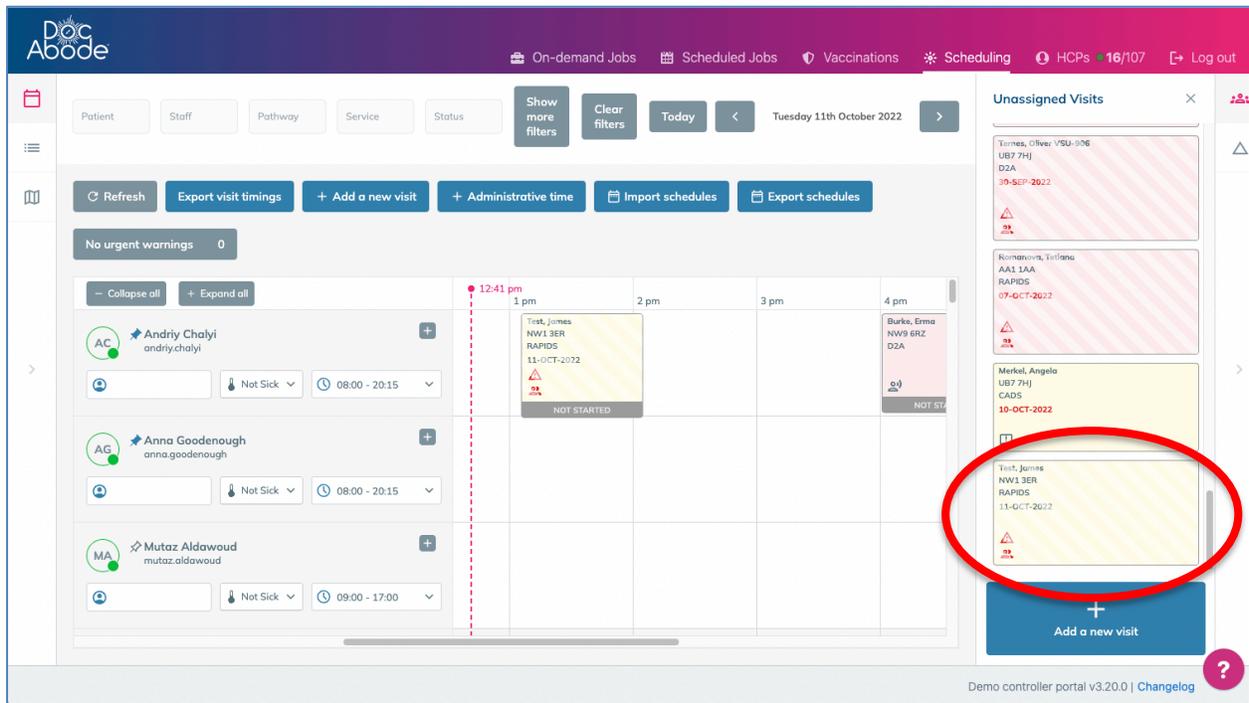


At the point a second HCP can be entered on the page. The page can be reviewed and saved in the usual way.

Note that in tile view a two-person icon is shown in the bottom left of the tile.



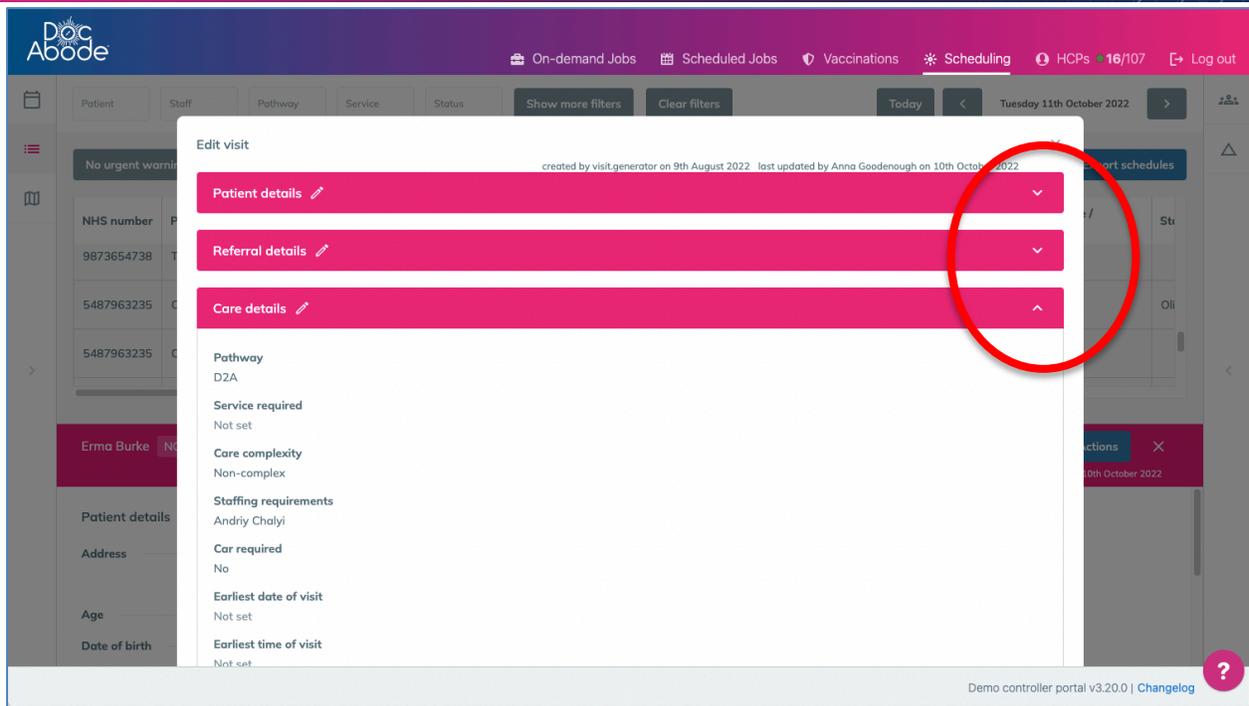
If one HCP is unassigned this icon will be shown in red and the tile will be washed with diagonal stripes. If the visit is overdue the wash will also be in red.



Changing a single visit to a double-up

This can only be done by selecting the visit, which can be found in grid view, list view or in the unassigned visits pane, scrolling down to the *Care details* section and pressing the pencil icon to enter edit mode.

If this is the only change to be made, the quickest way is to collapse the arrows to the right of the *Edit visit* pane to bring up the *Care details* window.



Then scroll down to get to the Staffing requirements field and change this to 2, as described above.

Changing one of the HCPs in the pair

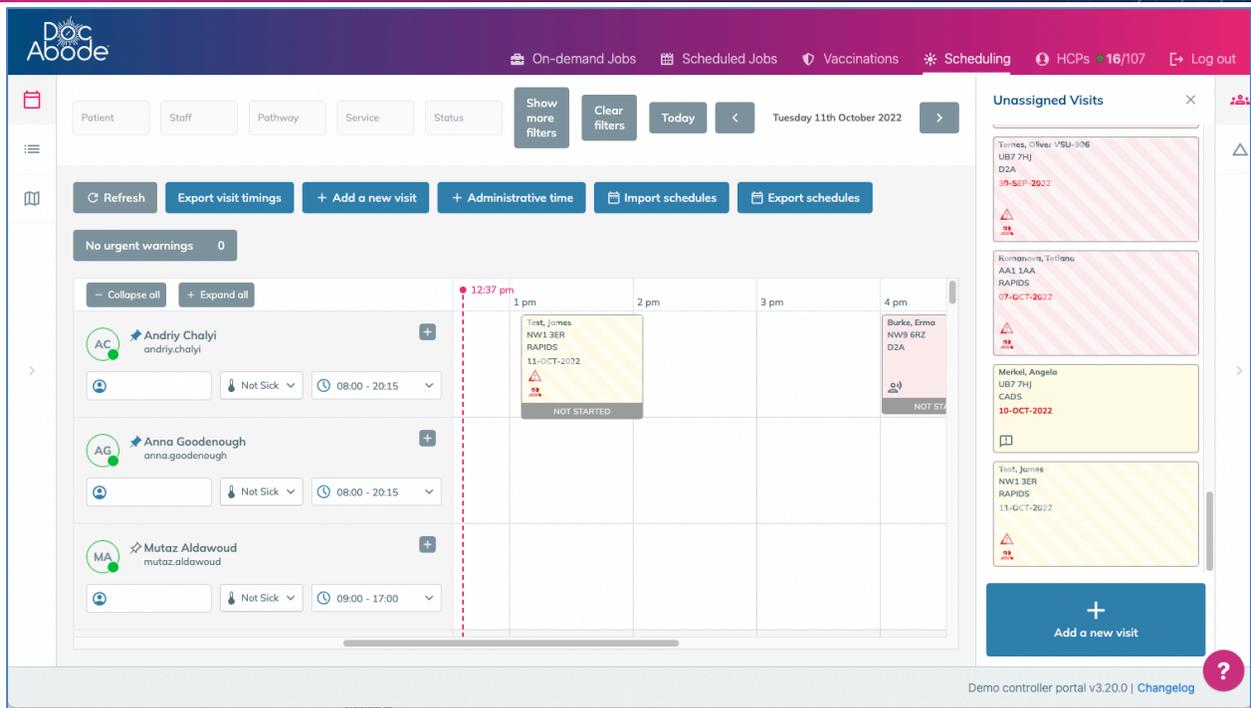
This can be achieved in two ways:

- in the *Edit details* pane, and
- via drag and drop in the grid view.

Using the grid view, one of the two tiles can be dragged to another HCP or even into the *Unassigned visits* pane.

Note that if one tile in a double-up is moved to change the visit time, the other tile will also move in tandem. Doc Abode will ensure both HCPs in a double-up visit are assigned for the same timeslot.

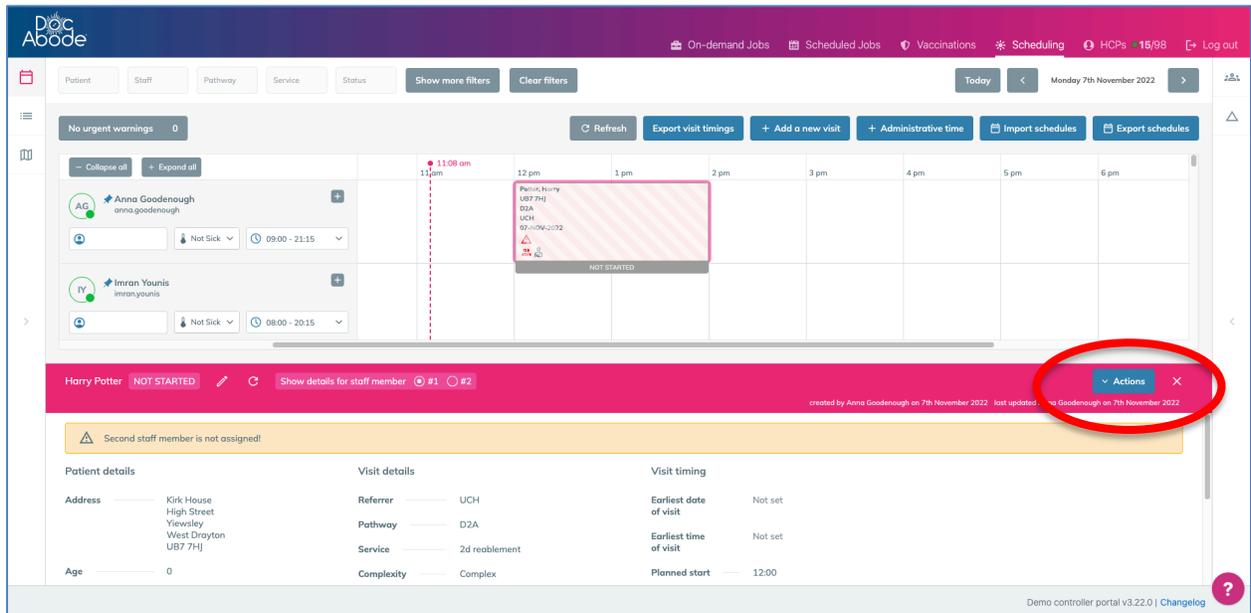
If there is one HCP in a double-up visit unassigned then the tile will appear with diagonal shading across it.



Changing a double-up to a single visit

This capability is available from the action menu in the visit.

Select the visit and press the Actions button



The option *Change to single staff* is presented.

The screenshot shows the Scheduling interface for Monday 7th November 2022. A patient named Harry Potter has a visit at 11:10 am. The visit is currently assigned to Anna Goodenough and is in a 'NOT STARTED' state. A red circle highlights the 'Change to single staff' option in the Actions menu.

This option will ask the controller which staff member to remove. This may be either of the HCPs assigned to the visit, including an unassigned HCP.

The screenshot shows the 'Change to single staff' dialog box. The dialog asks the user to select a staff member to remove from the double-visit. The options are #1 Anna Goodenough - NOT STARTED and #2 Unassigned - PENDING. The 'Confirm staff removal' button is highlighted.

Select the entry to remove and press the Confirm staff removal. If no staff member is assigned to the visit then it will move to the unassigned visits pool, otherwise it will remain allocated to the HCP but will become a single visit.