RiO 6

East London **NHS**
NHS Foundation Trust

RiO HCP Diary Management Client Contact Crib Sheet

Purpose

This document enables RiO users to record direct and indirect contact within the RiO diary management function.

Direct Client Contact is defined as an appointment, group, meeting, telephone call where the client is present / spoken to [OR this was the intention].

Indirect Client Contact is defined as a meeting, discussion or telephone contact concerning a client where the intention was for the client not to be present.

IMPORTANT NOTE: CPA review meetings must be recorded as a contact in the HCP diary in addition to recording the event details in the CPA Management screens.

Trust Recording Standards

Trust RiO Recording Standard 9:

Appointment outcomes must be entered in RiO within one working day.

Section 1: How to enter a direct client / carer contact

Navigate to diary screen [figure 1]

Click on the **Appointments** icon

Select the **Diary** option from the menu

Figure 1: Appointment menu

Select HCP from the drop down on the left of the screen [figure 2]

Enter the contact date required

Click **'Go'** [this will display the relevant HCP diary]

Click on the correct time of the contact

Figure 2: HCP diary

The standard client search screen appears

Search for the relevant client using the required search recommendations listed in the PDS Policy and Procedure, ensure the correct client record is selected and update any changes to demographic information.

IMPORTANT NOTE If the **Referral field** is blank select the appropriate referral for your contact

Repeat appointment: click the **Book Repeat Appointments** check box if required

- o Select the number of repeat appointments
- o Select the frequency
- o Do not select more repeat appointments than have been agreed with the client

Add another client button: click to add additional clients / carers to this appointment

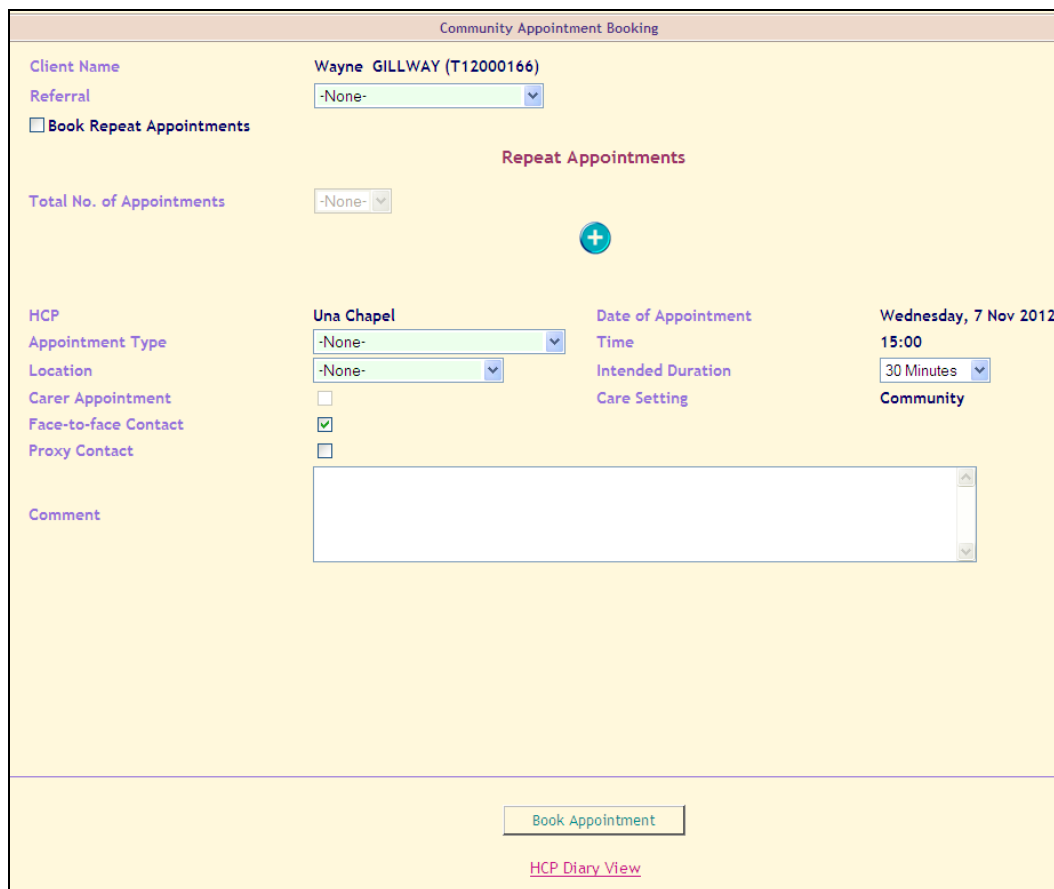**Appointment type:** select the most appropriate appointment type from the drop down

- o Select **'review'** for CPA reviews

Location: from the drop down list select the **'Location'** which reflects where the activity occurred

Intended duration: select the intended duration form the drop down

IMPORTANT NOTE Face to face: It is important for the accurate reporting of direct client contacts that the **'Face to Face'** box remains ticked, including where a telephone call with the client takes place/is being recorded. [Note that "Telephone" and "face to face" contacts will be distinguished via the use of Outcome codes]

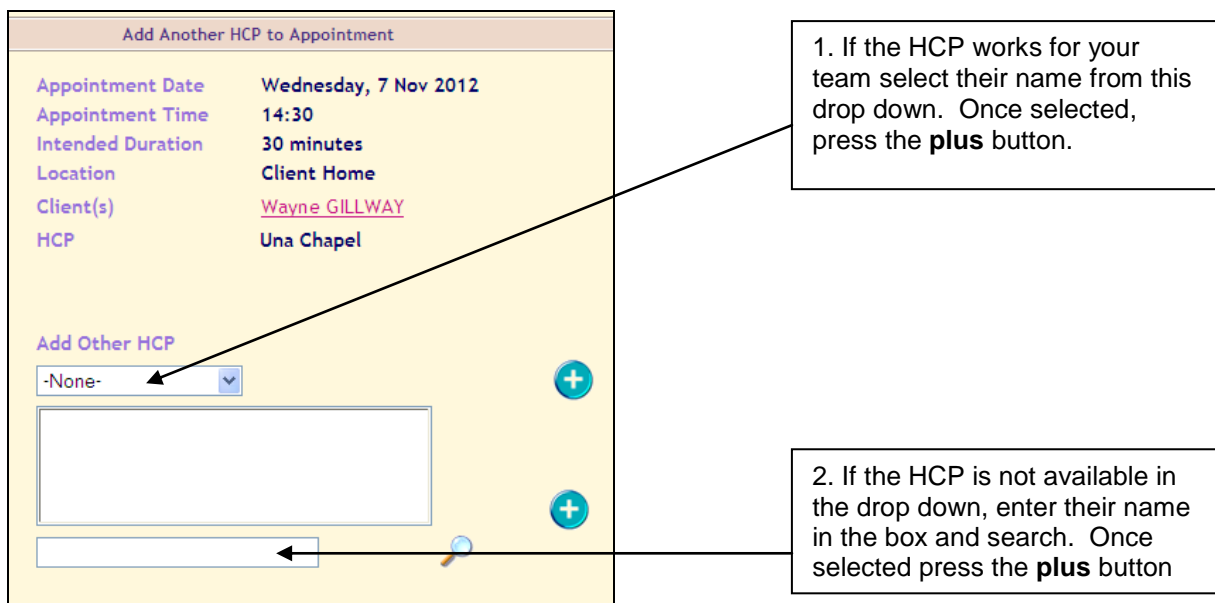**Book appointment:** click this button to save the direct contact details

Figure 3: Booking a diary appointment

Add other HCP: Once appointment has been booked, click the **blue 'plus'** button to add extra HCPs to this appointment. You will then be taken to the Appointment – Add Other HCP screen [figure 4]

Figure 4: Adding other HCPs to an appointment

Section 2: Additional Information when booking carer contact

Follow the steps above to book a carer contact. There is an additional step as you will need to confirm you are booking a carer contact [figure 5].

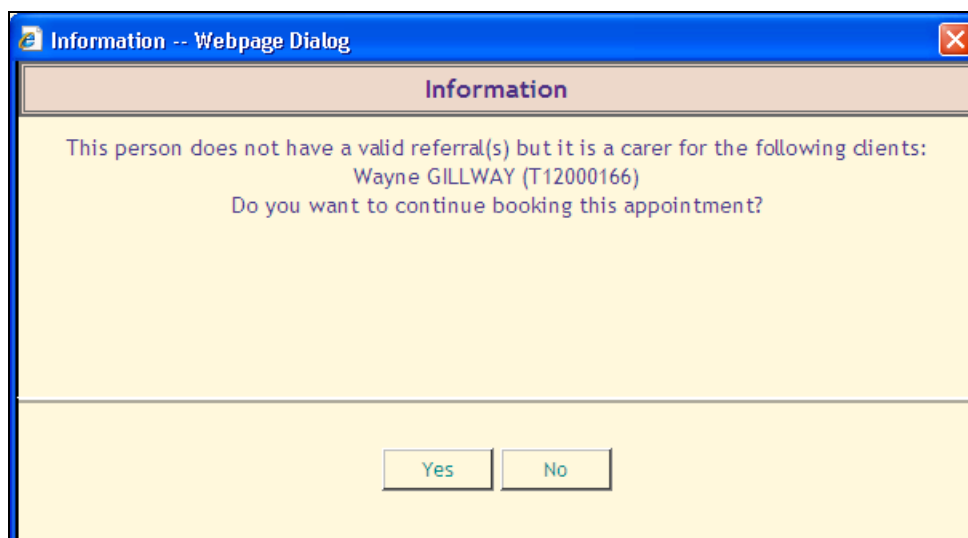**Figure 5: Valid referral message for a carer**

If the carer is also a client with a valid referral you will be prompted to chose the capacity in which you are seeing the person [figure 6].
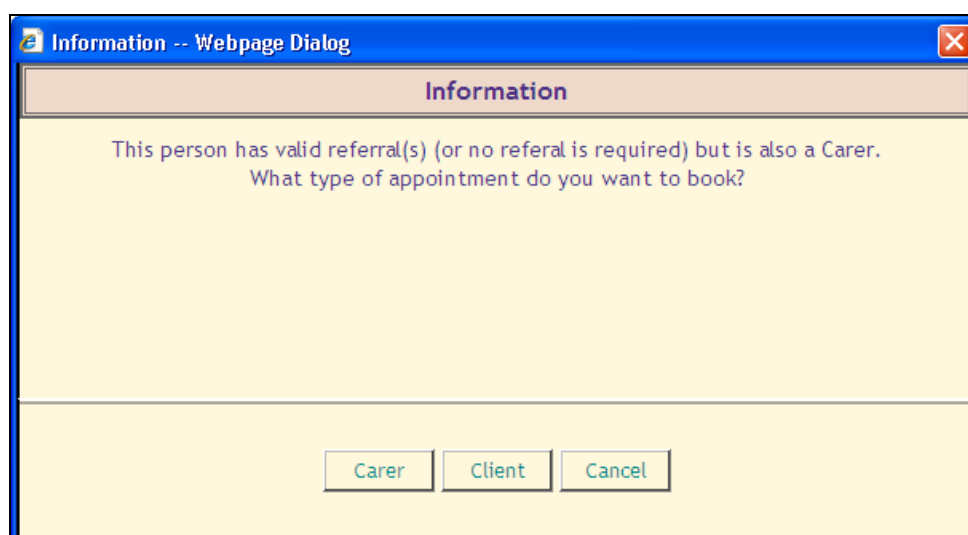
Figure 6: Valid referral message for a client / carer

IMPORTANT NOTES:

Carers need to be registered in RiO to enable contact recording.

Carers do not require a referral to enable contact recording

Section 3: Booking a diary appointment through HCP caseload

Navigate to the HCP caseload screen by selecting the **Client Record** icon and then select **Caseload**.

From the HCP drop down on the left hand side of the screen select the relevant HCP and click **'Go'**. This will display a list of clients associated with the selected HCP. If the user is a HCP the drop down should automatically default to the user's name and caseload.

Click on the arrow on the left of the client's details [figure 7] this displays a pick list of options. Click on the **Book Community Appointment** option.

Figure 7: Booking a diary appointment through the HCP caseload screen

This displays the HCP diary at today's date.

Figure 8: HCP diary

To book an appointment follow the steps in **Section 1** [figure 3].

Section 4: How to outcome a direct client contact

Navigate to the appropriate HCP diary screen for the contact to be outcomed

Click on the **'to outcome'** hyperlink to take you to the appointment outcome screen [figure 9]

To outcome the appointment

Actual duration: record the length of time spent with client
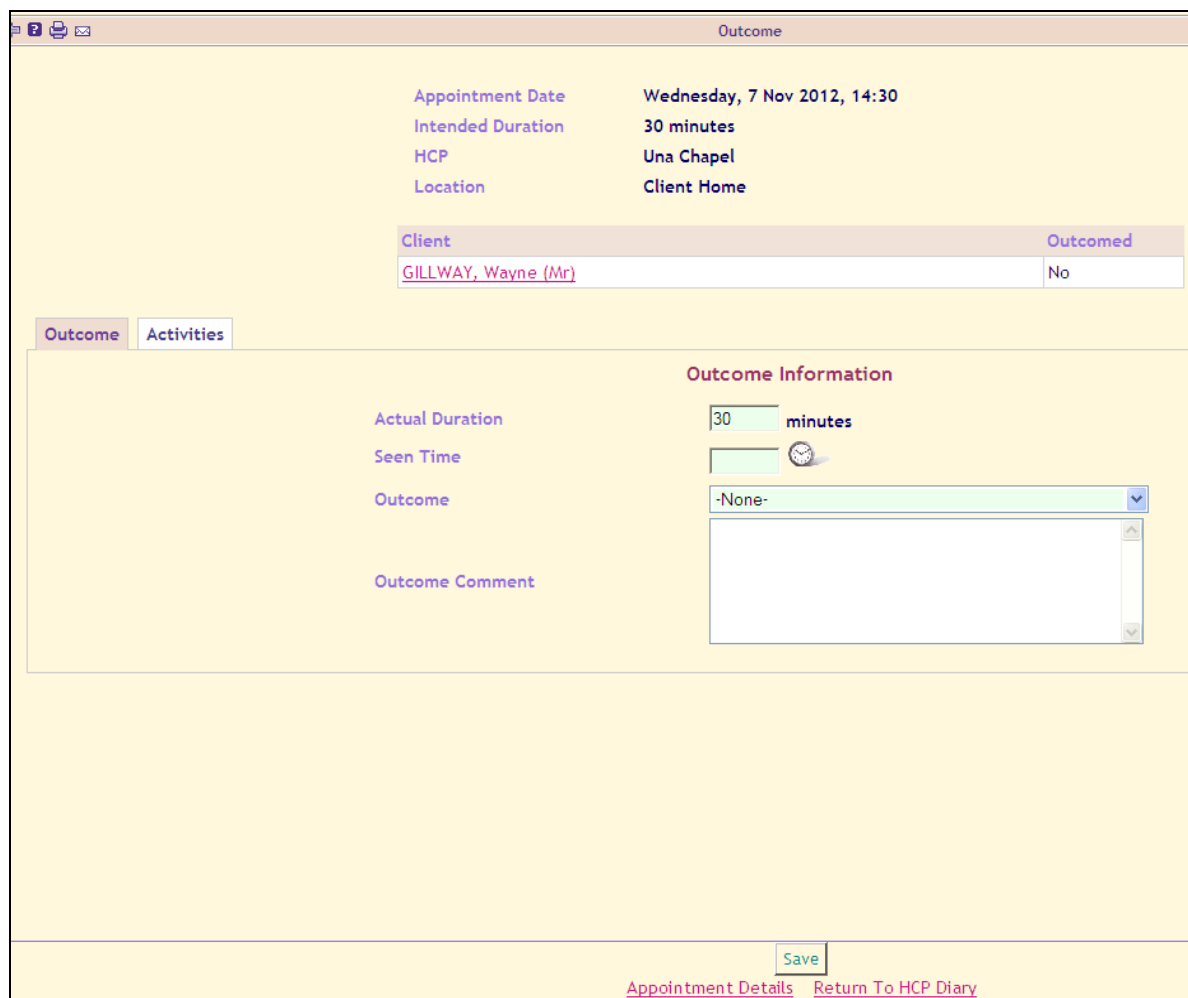
Seen time: record the start time of the client contact

Outcome: select the most appropriate outcome type from the drop down list

- o The Trust recording standard for 'Outcomes' is: 'ALL contact outcomes must be entered in RiO within one working day'
- o The most appropriate 'Outcome' must be selected from the drop down list see Table 1 for list of outcomes, note DNAs are included in this list].
- o **IMPORTANT NOTE:** It is of critical importance for the accurate reporting of **Telephone Contacts** that one of the Telephone outcomes is selected

Save button: click **'Save'**

IMPORTANT NOTE: only click **'Save'** once all data has been correctly entered, as this action will outcome the appointment. Ensure you record the activity before recording the outcome and saving.

Figure 9: Outcome an appointment

IMPORTANT NOTE: It is of critical importance to the accurate reporting of appointment outcomes that the correct selection is made from the 'Outcome' drop down list. Table 1 below lists the appointment outcomes and how they are mapped in Trust and National reports.

Appointment Outcome Drop Down List	Trust Report Mapping
Add to inpatient waiting list	The wait time for referral to first seen measure is achieved when one of the positive appointment outcomes is selected within the target timeframe. This WILL stop the wait time clock for referral to first seen reports.
Admitted	
Arrived late – seen	
Attended/Seen – change to plan	
Attended/Seen – discharge	
Attended/Seen – Follow up appointment needed	
Attended/Seen – MHA assessment	
Attended/Seen – no change to plan	
Attended/Seen – Referred for admission	
Telephone contact – change to plan	
Telephone contact – discharge	
Telephone contact – Follow up appointment needed	
Telephone contact – MHA assessment	
Telephone contact – no change to plan	
Telephone contact – Referred for admission	
Arrived late – not seen	If the patient does not attend their appointment select the most appropriate DNA code as the appointment outcome and this WILL reset the wait time clock for referral to first seen reports.
DNA/Not Seen – Add to inpatient waiting list	
DNA/Not seen – change to plan	
DNA/Not seen – discharge	
DNA/Not seen – Follow up appointment needed	
DNA/Not seen – no change to plan	
Telephone contact – no contact made	

Table 1

Section 5: How to enter an indirect contact

Follow **Section 2** to navigate to an HCP diary and select the relevant client in the correct appointment slot.

To book an indirect appointment complete the following:

IMPORTANT NOTE If the **Referral field** is blank select the appropriate referral for your contact

Repeat appointment: click the **Book Repeat Appointments** check box if required

- o Select the number of repeat appointments
- o Select the frequency
- o Do not select more repeats than have been agreed with the client

Add another client button: click to add additional clients / carers to this appointment

Appointment type: select the most appropriate appointment type from the drop down

Location: The location type of **'Indirect client contact'** must always be used when recording an indirect contact about a client.

Intended duration: select the intended duration form the drop down

IMPORTANT NOTE Face to face: It is important for the accurate reporting of indirect client contacts that the **'Face to Face'** box is **unticked**, this includes indirect telephone calls concerning the client. (NB this is a positive action as it is automatically ticked as a default).

Section 6: How to outcome an indirect client contact

Navigate to the correct date in the diary screen for the contact to that needs to be outcomed.

Click on the **'to outcome'** hyperlink to take you to the appointment outcome screen [figure 9Figure]

To outcome the appointment complete the following:

Actual duration: record the length of time of the contact when applicable

Seen time: record the time of the contact when applicable

Outcome: The outcome to be used for indirect client contacts must be one of the **"DNA/Not Seen"** options from the drop down list.

- o The Trust recording standard is: 'contact outcomes must be entered in RiO within one working day'
- o **IMPORTANT NOTE:** It is of critical importance for the accurate reporting of **Telephone Contacts** that one of the Telephone outcomes is selected

Save button: click **'Save'**

Section 7: How to cancel a contact

Navigate to the appointment booking screen

Click on the **Appointments** icon

Select the **Diary** option form the menu

Select the required HCP from the HCP drop down

Enter the date and time

Click **'Go'** (this will display the relevant HCP diary)

Click on the time of the contact you want to cancel

To cancel the contact complete the following:

Cancel button: Click on the **'Cancel'** button at the bottom of the screen

The cancel appointment screen appears

Cancellation reason: Select the most appropriate cancellation reason from the drop down [Table 2]

Cancel this appointment button: Click on the **'cancel this appointment'** button

Information dialogue box: Confirm cancel this appointment select **'yes'**

IMPORTANT NOTE: It is of critical importance to the accurate reporting of appointment cancellation reasons that the correct selection is made from the 'Cancellation Reason' drop down list. Table 2 below lists the cancellation reasons and how they are mapped in Trust and National reports.

Cancellation Reason Drop Down List	Trust Report Mapping
Cancelled by carer	APPOINTMENT cancelled by, or on behalf of, the PATIENT Codes included in cancellation reports as appointment cancelled by patient Appointments cancelled by one of these reasons WILL reset the wait time clock for referral to first seen reports
Cancelled by client	
Client died	
Client ill	
Client on holiday	
Client -other more pressing engagement	
Intend to go private	
Other client cancellation reason	
Cancelled by discharge	APPOINTMENT cancelled or postponed by the Health Care Provider Codes included in cancellation reports as appointment cancelled by Trust Appointments cancelled by one of these reasons WILL NOT reset the wait time clock for referral to first seen reports
Cancelled by HCP	
Client discharged	
Clinic cancelled	
Clinic overrun	
Not known who cancelled	
Referral transfer	
Rescheduled clinic	
Slot cancelled	
Treatment no longer required	
Death entered in error	Codes not included in cancellation reports
Appt. made for wrong client	
Appt. made with wrong provider	
CPA episode reversed	
Entered in error	

Table 2

Key contacts

If you make an error after outcoming the appointment please send an email to:

ElectronicSystems.Help@eastlondon.nhs.uk with the following details:

> Full Name of Client and Date of Birth or RiO Client ID
>
> Date and Time of outcomed appointment and name of HCP Diary
>
> Helpdesk will be able to reverse the outcome for it to be correctly entered

If any of the following occurs:

> HCPs change profession
>
> HCPs change team
>
> HCPs work for multiple teams

Send an email to: ElectronicSystems.Help@eastlondon.nhs.uk