Go to the patient’s Clinical Portal

From the Case Record Menu panel, click Referrals

The Referrals screen will show any current or discharged referrals

Click the RTT/Waiting List icon to the right of the referral you will associate with this appointment

Ensure you click Waiting Lists, in order to show the Current Waiting Lists screen containing the waiting list entry for your patient

Click the Book icon and click Community Appointment

The HCP Diary for the HCP associated with this waiting list will display, showing timeslots for today. You can click the arrows to show a different day, or click the Weekly or Monthly tabs

Click in the Change Selection area if you need to book a community appointment with a different HCP

Click the required timeslot for the community appointment
The **Book HCP Appointment** screen will display showing the **Date/Time** you have selected and the default **Intended Duration**

Ensure you have selected the correct referral to associate with the appointment

Click in the appropriate field if you wish to record **Transport** or **Interpreter** requirements or add **Comments**. This will display a pop-up window

Complete the fields as appropriate in the pop-up window and click **Save**

If appropriate, click on the **Additional HCPs** or **Intended Activities** tabs and complete the additional fields that subsequently appear

Click the **Repeat Appointments** tab if you wish to set up a pattern of appointments for the same duration and with the same HCP, and any other criteria set for the initial appointment

You will need to tick **Allow Repeat Bookings** in order to set repeat bookings

Click **Add Client** if more than one patient is to be seen at the appointment. Enter the name of anyone present who is not a patient in **Ad hoc Client** and click **Add**
Click **Book** at the foot of the screen

**RiO – Cancelling/Rescheduling Community Appointments**

Go to the **Diary** of the HCP who has an appointment to see the patient

Click the **timeslot** if you wish to amend any details of the appointment or wish to cancel the appointment

Complete the fields as appropriate in the **Cancel Appointment** screen

Click **Cancel This Appointment**

The **Appointment Scratch Pad** is used to re-schedule appointments. Note that although it is possible to click, drag and drop an appointment into a new timeslot, this will not correctly generate a new appointment letter. Therefore the **Appointment Scratch Pad** should always be used when rescheduling appointments.

The **appointment scratchpad should not be used by any Service using the Daily Team Planner** i.e. the IDT nursing teams. See the Daily Team Planner Quick ref guide.

Click the **timeslot** and drag and release it within the **Appointment Scratch Pad**

Any other appointments that are ready to be rescheduled will also show on the scratch pad
Complete fields in the **Move Appointment to Scratch Pad** window

Click **Move to Scratch Pad**

Go to the day when you will be rebooking the new appointment

Click the original appointment in the **Appointment Scratch Pad**, (the appointments will display in alphabetical order of the patients’ surname), and click, drag and release it into the new **timeslot**

Note that the click, drag and release procedure will not function in **Weekly** or **Monthly** view

The new **timeslot** will contain the patient’s re-scheduled appointment

Clicking the **status icon** will confirm that the appointment has been rescheduled

Clicking the **timeslot** will display the **Book HCP Appointment** screen

Click the **Appointment History** tab to display a history of appointments for the patient
RiO – Outcoming Community Appointments

Go to the Diary of the HCP who has seen the patient

In the Outcome column, click To Outcome. The Attendance Indicator screen will display

There are up to 4 tabs in the Attendance Indicator screen

Do NOT click Save until all relevant tabs have been completed

Click the Attendance Information tab and complete fields as appropriate

Click the Activities tab, select one or more Activity and click the green plus icon

Record the Actual Duration of the activity you have selected

Click the Assessments tab and then click each folder until you are able to complete all necessary assessment information.
When you are completing a form, ensure you click any appropriate Add icon that is within the body of the form.

If you do not click on any appropriate Add icons, then once you have fully completed the form (and clicked on the Save icon for that form), not all of your entries will be retained.

Click the RTT National Status tab and select the relevant RTT code

Only click Save once all relevant details of the appointment have been recorded in each tab

Once an appointment has been outcome it will not be possible to amend any recorded details

Trouble Shooting Outcomes

If the outcome fails to save – it may be due to a number of reasons which include (but not limited to):

<table>
<thead>
<tr>
<th>Issue</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overlapping times/events in clinicians diary</td>
<td>Check the timeslots before and after the slot you are trying to outcome and change any times</td>
</tr>
<tr>
<td>Not recording the status of activities</td>
<td>If you have recorded Intended activities ensure you check the activity tab and ensure you have checked the appropriate radio button i.e. Actual</td>
</tr>
<tr>
<td>Attempting to record a “new” appointment against a referral that has already has a “new” contact recorded and should therefore be a Follow up</td>
<td>Check the patient has no previous contact that has been recorded as New activity. Change the activity type to Follow up</td>
</tr>
<tr>
<td>If you attempt to save the outcome 3 times (without making corrections) the information in your progress notes and forms will not be saved.</td>
<td></td>
</tr>
</tbody>
</table>