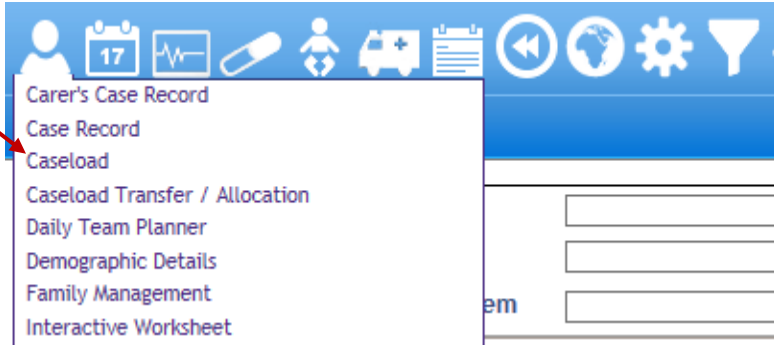



RiO – Allocating Patients to a HCP Caseload



Access to this function may be restricted

Click the **Patient** icon  on the Rio homepage

Click **Caseload**




The **Caseload** screen will display your name as the **HCP**. Select the lead **HCP** for your team

Tick the **Team Referral** check box

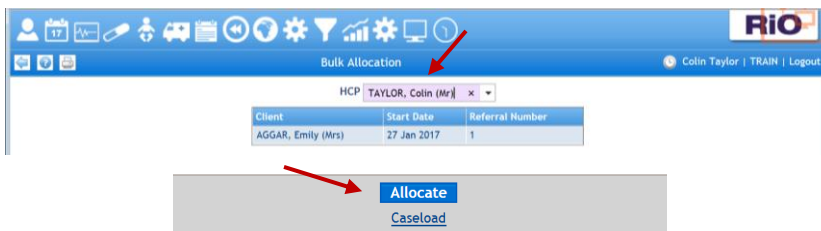
Click **Go** to display all team referrals, i.e. referrals not yet allocated to a specific HCP



Click the **action** icon  to display a menu of possible actions for the caseload entry

Click **Allocate**

If you wish to carry out a bulk allocation, tick the check box for each caseload entry and click **Allocate** at the foot of the screen



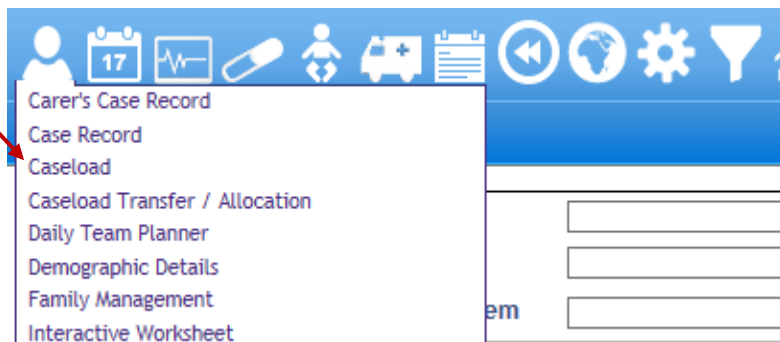
In the **Bulk Allocation** screen, select the **HCP** who is being allocated the caseload entry


Click **Allocate**

HCP	Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment
TAYLOR, Colin (Mr)	AGGAR, Emily (Mrs)	POD - Domiciliary	SY20 8SB	2 Feb 2017			Routine	
	BABEL, Jane (Ms)	POD - General Contacts	SY13 3HL	2 Jan 2017			Routine	
	BABEL, Jane (Ms)	POD - Domiciliary	SY13 3HL	2 Jan 2017			Routine	
	CAVE, Joan	POD - General Contacts	WF13 3HG	1 Feb 2017			Routine	
	WHITE, Walter	POD - Domiciliary	B65 9SG	31 Jan 2017			Routine	

The allocated caseload entry will now display on the **Caseload** screen of that HCP

RiO – Viewing Caseloads



Click the **Patient** icon  on the Rio homepage

Click **Caseload**

HCP	Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment
TAYLOR, Colin (Mr)	WHITE, Walter	POD - Domiciliary	B65 9SG	31 Jan 2017			Routine	

The **Caseload** screen will display your name as the **HCP**. A different **HCP** can be selected if available

The screen will be empty until you tick at least one **Filter** box and click **Go**


HCP	Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment
TAYLOR, Colin (Mr)	WHITE, Walter	POD - Domiciliary	B65 9SG	31 Jan 2017			Routine	

Result page: 1 Total pages: 1
[Allocate](#) [Remove](#)
[HCP Diary](#) [To-Do List](#) [Team Caseload](#)

Click the **Team** filter and **Go**, or click **Team Caseload** if you wish to see caseload entries for teams

Team Caseload

Teams	Client	Post Code	Start Date	Next Review	Inpatient Location	HCP	Referral Urgency	Next Appointment
POD - General Contacts	WINDSOR, Elizabeth	SW1A 1AA	30 Nov 2016				Routine	
	WILLIAMS, Robbie (Mr)	SY1 4SJ	8 Nov 2016				Routine	
	WILCOX, William (Mr)	B65 9SG	17 Nov 2016			CLINICIAN, Anne	Routine	
	WILCOX, William (Mr)	B65 9SG	13 Dec				Routine	3 Feb


Click the black **arrows**  to sort the order of records

Enter text in the **Family name** field and click **Go**, to display a patient's caseload entry

Team Caseload


Teams	Client	Post Code	Start Date	Next Review	Inpatient Location	HCP	Referral Urgency	Next Appointment
POD - General Contacts	WHITE, Walter	B65 9SG	13 Dec 2016				Routine	3 Feb 2017

- View Other Professionals
- View Appointments
- Book Clinic Appointment
- Book Community Appointment

Click the **action** icon  to display a menu of possible actions

RiO – Transferring Caseloads

- Carer's Case Record
- Case Record
- Caseload
- Caseload Transfer / Allocation**
- Daily Team Planner
- Demographic Details
- Family Management
- Interactive Worksheet

Click the **Patient** icon  on the RiO homepage

Click **Caseload Transfer/ Allocation**

Caseload Transfer / Allocation

Team Select HCP Select

- ADMIN, Servelec
- ADMIN2, Servelec2
- ADMIN3, Servelec3
- BAILEY, Jen
- FORBES, Sophie (Miss)
- HILL, Sandy (Mrs)
- OLEARY, Helen (Ms)
- TURTON, Katie
- TAYLOR, Colin (Mr)

You can view team or HCP caseloads by selecting from the **Team** or **HCP** picklist and clicking **Go**

Caseload Transfer / Allocation

Allocate From: OLEARY, Helen (Ms)

Allocate To: GOODFELLOW, Mark (Mr); HILL, Sandy (Mrs); HILTON, Eric; OLEARY, Helen (Ms); TAYLOR, Colin (Mr); TURTON, Katie

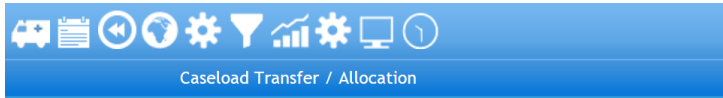
Start Date: 2 January 2017

Name	Address	DOB	Referral	Share	Reallocate
BABEL, Jane (Ms)	Greenbank Grange Rd SY13 3HL	27 Sep 1963	PODIATRY SERVICE on 28 Nov 2016, 13:53	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BABEL, Jane (Ms)	Greenbank Grange Rd SY13 3HL	27 Sep 1963	PODIATRY SERVICE on 28 Nov 2016, 14:03	<input type="checkbox"/>	<input type="checkbox"/>
BABEL, Jane (Ms)	Greenbank Grange Rd SY13 3HL	27 Sep 1963	PODIATRY SERVICE on 28 Nov 2016, 14:04	<input type="checkbox"/>	<input type="checkbox"/>

In the **Caseload Transfer/ Allocation** screen, select when and to whom the caseload entry will be transferred by completing the **Allocate To** and **Start Date** fields

Tick the **Reallocate** check box of the caseload entry you will be transferring

Click **Allocate Caseload Item**



Allocation status: Transfer Successful

Allocate From: O'LEARY, Helen (Ms)

Allocate To:

- ADMIN, Servelec
- ADMIN2, Servelec2
- ADMIN3, Servelec3
- BAILEY, Jen
- CLINICIAN, Anne
- CLINICIAN, Carmen

Start Date: [Calendar icon]

Comment: [Text area]

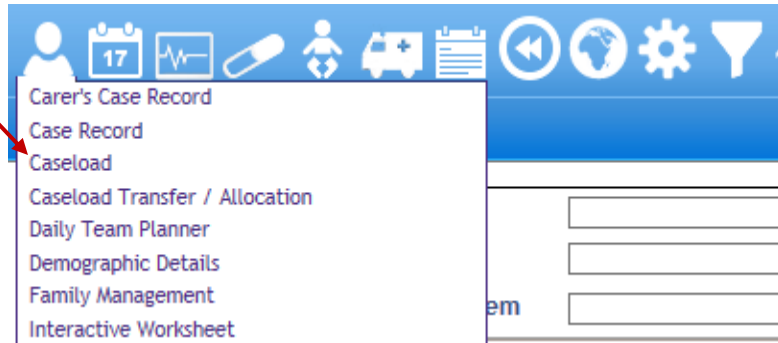
A confirmation message will appear -


Allocation status: Transfer Successful

HCP	Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment
TAYLOR, Colin (Mr)	BABEL, Jane (Ms)	POD - General Contacts	SY13 3HL	2 Jan 2017			Routine	
	WHITE, Walter	POD - Domiciliary	B65 9SG	31 Jan 2017			Routine	

The transferred caseload entry will now display on the **Caseload** screen of the new HCP

RiO – Removing Caseload Entries



Click the **Patient** icon  on the Rio homepage

Click **Caseload**

HCP	Client	Team	Post Code	Start Date	Next Review	Inpatient Location	Referral Urgency	Next Appointment
TAYLOR, Colin (Mr)	AGGAR, Emily (Mrs)	POD - Domiciliary	SY20 8SB	2 Feb 2017			Routine	
	BABEL, Jane (Ms)	POD - General Contacts	SY13 3HL	2 Jan 2017			Routine	<input checked="" type="checkbox"/>
	BABEL, Jane (Ms)	POD - Domiciliary	SY13 3HL	2 Jan 2017			Routine	
	CAVE, Joan	POD - General Contacts	WF13 3HG	1 Feb 2017			Routine	
	WALTER, Sidney	POD - General Contacts	BD19 3HH	2 Feb 2017			Routine	
	WALTER, Sidney	POD - General Contacts	BD19 3HH	2 Feb 2017			Routine	
	WALTER, Sidney	POD - General Contacts	BD19 3HH	2 Feb 2017			Routine	
	WHITE, Walter	POD - Domiciliary	B65 9SG	31 Jan 2017			Routine	
	WHITE, Walter	POD - General Contacts	B65 9SG	2 Feb 2017			Routine	

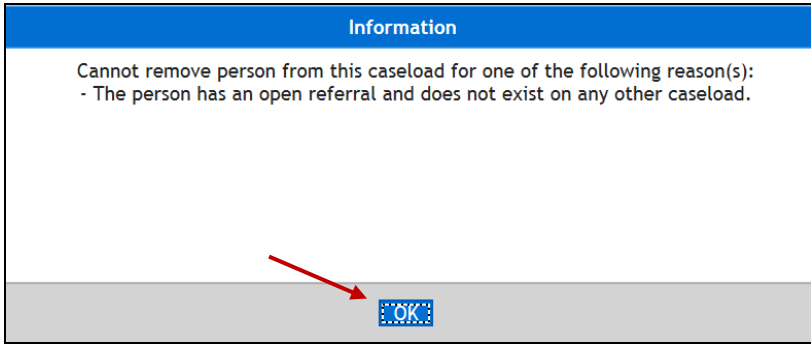
In the **Caseload** screen, tick the check box of the caseload entry you will be removing

Result page: 1 Total pages: 1

[Allocate](#) [Remove](#)

[HCP Diary](#) [To-Do List](#) [Team Caseload](#)

Click **Remove**



If you try to remove a caseload entry that still has an open referral, and does not exist on another caseload, an **Information** message will display.

Click **OK**

You will firstly need to close the referral if you still wish to remove the caseload entry