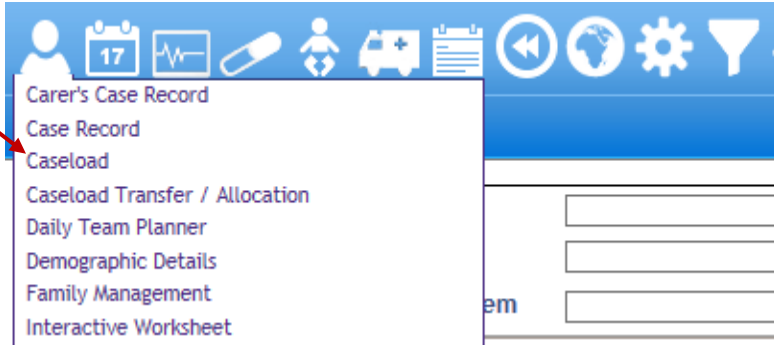# RiO – Allocating Patients to a HCP Caseload

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

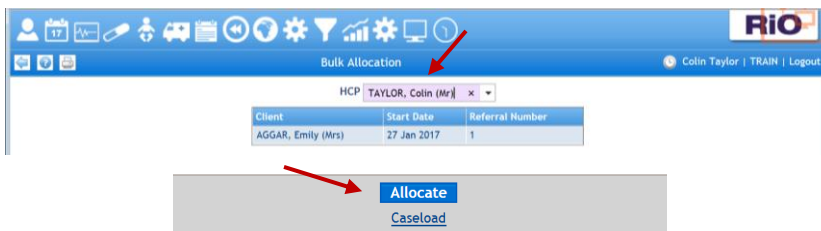Tick the **Team Referral** check box

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
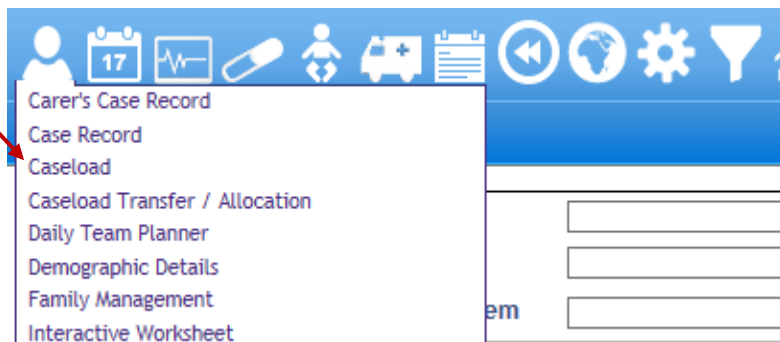

In the **Bulk Allocation** screen, select the **HCP** who is being allocated the caseload entry

Click **Allocate**

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

RiO – Viewing 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**

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 **Filte**r box and click **Go**

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

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

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

RiO – Transferring Caseloads

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

Click **Caseload Transfer/ Allocation**

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

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**

A confirmation message will appear -
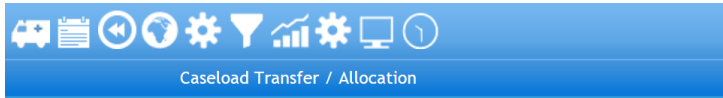
Allocation status: Transfer Successful

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**

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

Click **Remove**
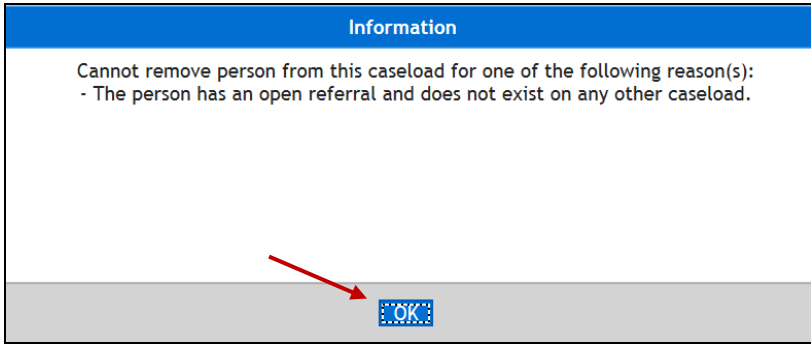
Information Cannot remove person from this caseload for one of the following reason(s): - The person has an open referral and does not exist on any other caseload. OK	If you try to remove a caseload entry that still has an open referral, and does not exist on another caseload, an **Information** message will display. Click **OK** You will firstly need to close the referral if you still wish to remove the caseload entry