



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne - Caseload Management Mini Guide



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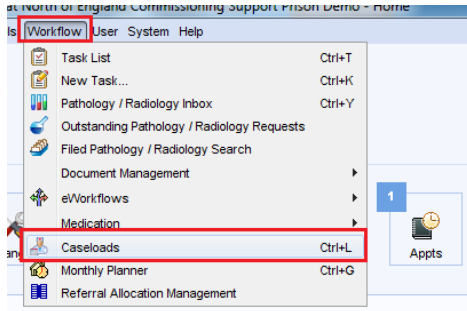
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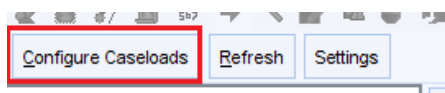
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Configure Caseload

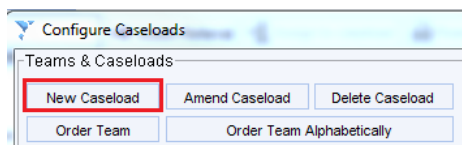
1. Click **Workflow > Caseloads**



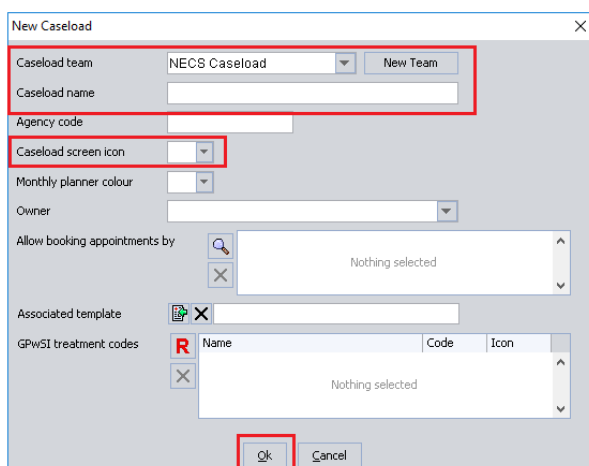
2. Click **Configure Caseloads**



3. Click **New Caseload**

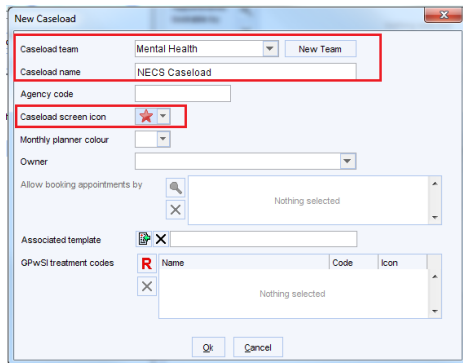


4. Select a **Caseload team** from the existing drop down list or click **New Team**

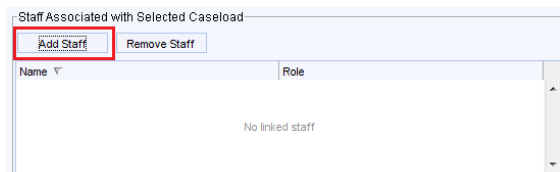


5. Type the **Caseload name**
6. Select an **Icon** for the team
7. Click **Ok** when complete

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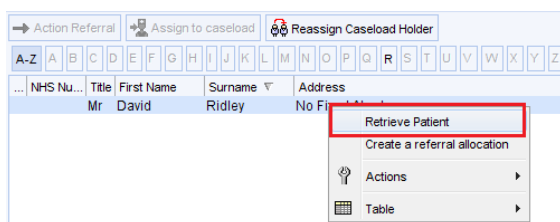
8. Highlight the relevant caseload from the left pane and click **Add Staff** on the right hand pane to associate staff to this caseload



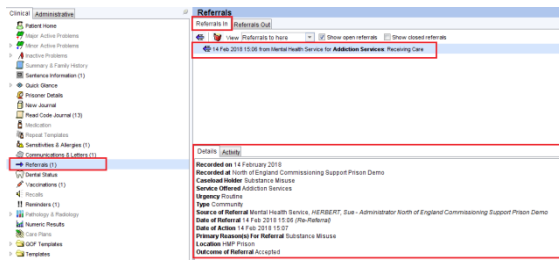
9. Continue this process to create more team / individual caseloads

Reviewing a Referral In

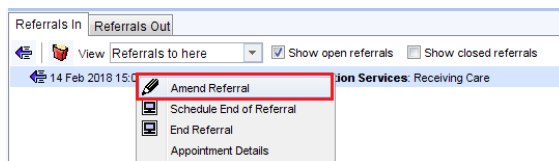
1. Although referrals can be assigned / reassigned to teams or individuals from the caseload screen, it is good practice to review the patient record and then update the referral
2. Highlight the relevant patient, right click and select **Retrieve Patient**



3. Review the patient record as per normal process
4. Click **Referrals** from the clinical tree and ensure the **Referral In** tab is selected
5. Click to highlight the relevant referral to view more details

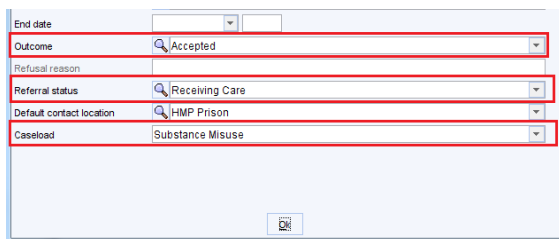


6. Right click on the referral and select **Amend Referral**



7. The referral can now be updated / amended for example:

Outcome
Referral Status
Caseload

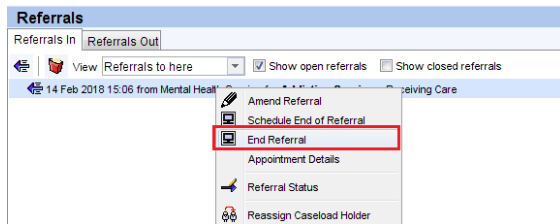


8. Click **Ok** and **Save** the patient record when finished

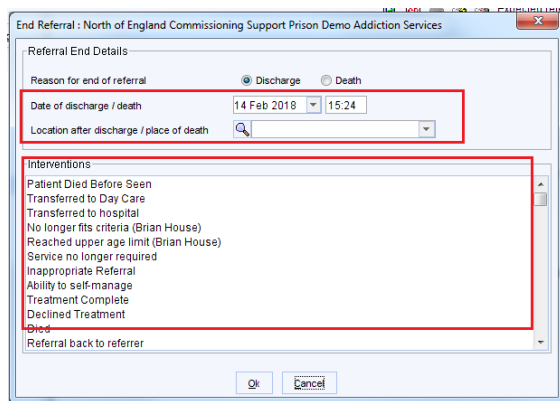
Ending a Referral In

1. When the patient's care is complete for a particular service the referral will need to be ended to remove from the caseload.
2. Retrieve the patient and record any clinical information as per normal process.
3. Click **Referrals** from the clinical tree and ensure the **Referral In** tab is selected.
4. Click to highlight the relevant referral
5. Right click and select **End Referral**

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6. Complete the **Date of discharge**, the **Location after discharge** and **Interventions**



7. Click **Ok** and **Save** the patient record

Note: You cannot delete a caseload until all patients care has been ended, then the caseload must be removed via Configure Caseloads.