

## InTouch Flow Manager – Filtering the Patient List

You can tailor the appointment list displayed in the Dashboard/Clinician tabs by using filters.

### I. Location/ Specialty/ Clinician / Clinic Filters



The screenshot shows a filter interface with four dropdown menus arranged in a 2x2 grid. The top-left dropdown is labeled 'Location' and has a downward arrow. The top-right dropdown is labeled 'Specialty' and has a link 'Click to change Specialties' next to it. The bottom-left dropdown is labeled 'Clinician' and has a link 'Click to change Clinician' next to it. The bottom-right dropdown is labeled 'Clinic' and has a link 'Click to change Clinics' next to it.

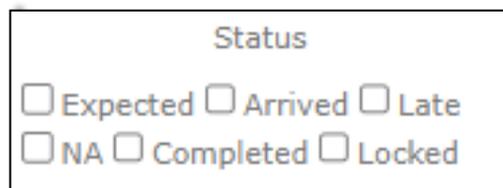
- A. Location – displays patient appointments in the selected location
- B. Clinician – displays patient appointments for a specific clinician
- C. Specialty – displays patient appointments for a specific specialty.
- D. Clinic – displays patient appointments for a specific clinic (Session short name code in PAS)

#### Note:

1. **For Receptionist** – To unarrive a patient, the Location must be set to the “Main” waiting area and not an indented sub-waiting area
2. **For Nurses** – Set the Location to the indented sub-waiting area you are working from
3. **For Clinician** – Set the Clinician to the Clinician in Charge of your clinic, which may be you

All the above filters are cumulative and are retained even when you log out and log back in again.

### II. Status tick boxes



The screenshot shows a box titled 'Status' containing six checkboxes with labels: 'Expected', 'Arrived', 'Late', 'NA', 'Completed', and 'Locked'.

- A. Expected (Default) – patients expected to attend their appointments today
- B. Arrived (Default) – patients who have arrived via kiosk/reception (Green)
- C. Late – patients who are 30+ mins late (Orange)
- D. NA (Not Arrived) – patients who are 1+ hour late (Red)
- E. Completed – appointments which have been marked as Outcomed in PAS. (Yellow)
- F. Locked – patients with a locked appointment.

Tick statuses as required, the more tick boxes selected, the more appointments will be displayed.

All the above filters are cumulative and are retained even when you log out and log back in again.

## II. Status Radio Buttons



- A. All – will show all appointments from 00:00 – until last appointment of the day
- B. Morning- will show appointment from 00:00 – 13:00
- C. Afternoon – will show appointment from 13:00 – until the last appointment of the day

**Note:** This filter is **not** retained when you log out and in again.

## III. Time Bar



- A. Using the slider will show patient appointments ranging from 0 (the current hour) to 6 (in the future) hours.

**Note:** The Time Bar resets to 1 hour if you click on another tab (if you have more than one tab).

## IV. Clear filter

Click



The Dashboard/Clinician tab returns to its default filters.

A screenshot of the filter settings interface. It includes several sections:
 

- Location:** A dropdown menu with 'None Selected'.
- Specialty:** A dropdown menu with 'Click to change Specialties'.
- Status:** A group of checkboxes: 'Expected' (checked), 'Arrived' (checked), 'Late' (unchecked), 'NA' (unchecked), 'Completed' (unchecked), and 'Locked' (unchecked).
- Time Scale:** A slider set to '1 hr(s)'.
- Clinician:** A dropdown menu with 'Click to change Clinician'.
- Clinic:** A dropdown menu with 'Click to change Clinics'.
- Media:** A dropdown menu with 'Click to change Media' and a clear filter icon.
- Radio Buttons:** 'All' (selected), 'Morning', and 'Afternoon'.