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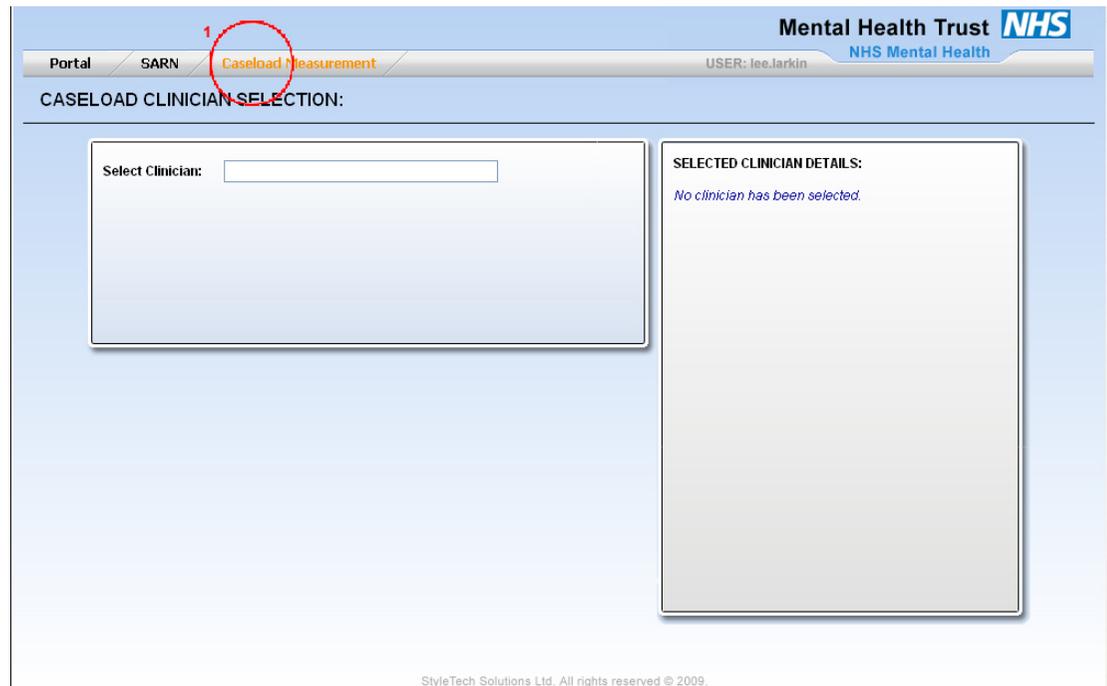
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CASELOAD MEASUREMENT

CASELOAD SELECTION

The Caseload Measurement can be accessed by clicking the “Caseload Measurement” menu option on the menu bar. Once selected a blank “Caseload Clinician Selection” screen is displayed. The selection screen allows the following functionality:

- Select a clinician
- Creation of a new caseload
- Complete a caseload
- Change a caseload
- View of an assessment
- List a clinicians caseload history



Key Areas:

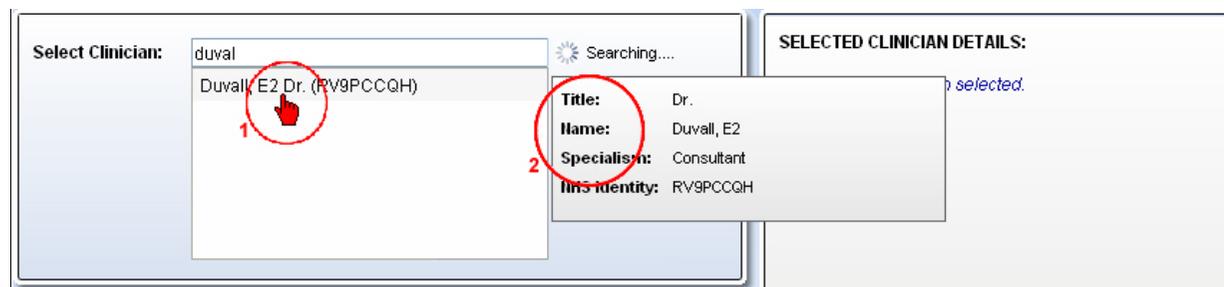
1. Caseload Measurement menu option selected from the menu bar.

SELECTING A CLINICIAN

The blank selection page has two panels. The panel on the left is used to input and select the clinician and the right panel is used to display the selected clinician information.

The clinician is selected by entering the clinicians' name or NHS identity number into the "Select Clinician" input box. As the details are typed, the search is performed and a drop down selection list displayed below the input box. The more characters typed into the box the more the search is refined and the selection list reduced in size.

When the required clinician is found, highlight the clinician in the list by hovering over the item in the list using the mouse and click to select.



Key Areas:

1. As characters are typed, a drop down is displayed allowing selection to be made.
2. As the cursor is moved over the clinicians, in the dropdown, a tool tip giving further clinician details is displayed on the right.

If the entered criterion returns more than 250 clinicians, the drop down selection list displays "Your criteria returned too many clinicians, please continue".

If the entered criterion returns no clinicians, the drop down selection list displays "No clinicians match your criteria".



NEW CASELOAD ASSESSMENT

The “Caseload Assessments” can be accessed by clicking the “Caseload Measurement” menu option on the menu bar; the “Caseload Clinician Selection” screen is displayed. Enter the criteria required to select the required clinician.

The “Caseload History” is displayed below and will list completed and partially complete caseload details. Only one caseload assessment can be processed at a time, depending on the status of the latest caseload assessment the [New Caseload] action button will either be displayed or hidden. In the example below with no partially completed caseload assessments the [New Caseload] action button is displayed. If a partially completed caseload exists it must be finished before a new caseload assessment can begin.

To begin entering the new caseload, click the [New Caseload] action button and the “New Caseload” screen will be loaded. If at any time you wish to return to the “Caseload Clinician Selection” screen, click the “Caseload Measurement” menu option on the menu bar.

Key Areas:

1. Click the [New Caseload] action button to begin entry of a new caseload for the selected clinicians.



NEW CASELOAD – continued:

Caseload Initial Layout

A blank “Caseload Assessment” screen is displayed in the example below. The screen consists of three main panels; a patient list panel on the left, a progress panel top right, a question panel bottom right. Header details including the caseload assessment date, the clinician and the selected patient’s details are displayed across the top. The selected patient is also highlighted in the patient list panel.

The screenshot displays the 'Caseload Measurement' interface. At the top, it shows the user 'lee.larkin' and the assessment date '03 September 2008'. The clinician is 'Duvall, E2 Dr. (RV9PCCGH)' and the patient is '...2 (9999999999)'. The patient list on the left shows 343 patients, with 0 completed. The progress panel shows a table with columns Q1a through Q4 and Caseload Weighting. The question panel shows 'Q1A) CLIENT FACTORS - DISORDER/DIAGNOSIS/PRESENTATION' with a text area and a score selection area at the bottom with buttons for None (0), Slight (1), Moderate (2), Significant (3), and Very Significant (4).

Key Areas:

1. Progress panel displaying the 7 questions and the final caseload weighting for the patient.
2. Selected question and details.
3. Question score buttons (0-4)
4. Number of patients for this clinician and number completed in this caseload.
5. [Select] action button which can be used to select any patient in the clinicians list.
6. [Delete Assessment] will delete any partially completed caseload assessment. Completed assessments cannot be deleted.
7. [View] action buttons used to display further information on the clinician and patient. The [Change] action button is used to return to the blank “Caseload Clinician Selection” screen



NEW CASELOAD – continued:

Patient List Panel

The patient list panel is populated with all the clinicians' patients at the time (snapshot) the caseload assessment was created. Patients that are added or removed from the clinician's workload in "iPM" will not be reflected in the patient list until a new caseload assessment is created. The list contains details on each patient with further details available by clicking the patient in the list to display a grey tool tip. Each patient also includes an action button which is initially set to [Select] but becomes [Edit] when dependency scores have been saved for the patient. The panel also displays the number of patients and the number completed.

Progress Panel

The progress panel displays the seven questions which require dependency scores and a final caseload weighting showing the total score for the selected patient. The questions are selected automatically as each score is added but can be selected manually by clicking the question number i.e. by clicking "Q1b". The progress panel current question is highlighted with a yellow background. A progress panel question that has a score is highlighted with an amber background.

Question Panel

The question panel displays the current question heading and the question information. Below the information the five scoring buttons are displayed. Clicking a scoring button adds the score to the progress panel and automatically selects the next question. To review a question that already has a score, click the question number on the progress panel and the question panel will redisplay the question allowing the score to be updated using the scoring buttons.

When all scores have been added the panel displays the final caseload weighting and a calculated dependency score ranging from 1 to 4 for the selected patient. Further information on the patients care cluster will also be displayed if available.



NEW CASELOAD – continued:

Patient Scoring

When a new caseload is selected the screen automatically selects the first patient in the patient list panel (Key area: 1). The first question is selected and highlighted in the progress panel. The clinician can then score each question using the scoring buttons displayed on the bottom of the question panel. As each question is scored the next question is displayed automatically. To return to a question previously scored simply click the question number on the progress panel and the selected question is re-displayed allowing the score to be updated.

Mental Health Trust NHS
NHS Mental Health
USER: lee.jarkin

CASELOAD ASSESSMENT: 03 September 2008 [Delete Assessment] Clinician: Duvall, E2 Dr. (RV9PCCQH) [View] [Change]
Patient: ..., ..2 (9999999999) [View]

Q1a	Q1b	Q1c	Q1d	Q2	Q3	Q4	Caseload Weighting
1	2	3	2				

Q2) ENVIRONMENTAL FACTORS
Are you working predominately with the carer? Does this entail establishing FAC's criteria to determine eligibility for services for client or carer eg. Respite care/ direct payments. Does the inadequate/unstable staffing levels/lack of clarity in roles, mix in homes or the need for support add time on to your work with the client? Is the environment inappropriate to meet the client's needs or care plan? Is the client employed or homeless which makes visiting difficult. Are there difficulties with the client using mainstream services? Is there any conflict of professional/carers/client opinion over treatment or referral? Does the requirement for protocol/guidelines extend the time taken to complete your work? Are there repeated failed visits?

None (0) Slight (1) **Moderate (2)** Significant (3) Very Significant (4)

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Key Areas:

1. The selected patient is highlighted in the patient list panel.
2. The current question is highlighted in the progress panel.
3. Scoring buttons ranging from 0 – 4 for each question.



NEW CASELOAD – continued:

Patient Caseload Weighting

Once the final question has been scored the total of all scores for the selected patient is added to the caseload weighting on the progress panel and the calculated dependency displayed in the question panel. If the patient has undergone a SARN assessment the care cluster information is also displayed.

The patient list is updated with the caseload weighting and dependency score and the completed count updated by 1. The [Select] action button is changed to an [Edit] on the selected patient. To select the next patient the clinician can click the “Next Patient” button (Key area: 5), this will automatically select the next patient in order and reset the progress panel highlighting question “Q1a”.

Mental Health Trust NHS
NHS Mental Health
USER: lee.larkin

CASELOAD ASSESSMENT: 03 September 2008 [Delete Assessment] Clinician: Duvall, E2 Dr. (RV9PCCQH) [View] [Change] Patient: ...2 (999999999) [View]

Q1a	Q1b	Q1c	Q1d	Q2	Q3	Q4	Caseload Weighting
1	2	3	2	2	3	4	17

PATIENT DEPENDENCY SCORE:

DEPENDENCY: 3
WEIGHTING SCORE: 17
CARE CLUSTER: No SARN assessment exists for this patient

Next Patient

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Key Areas:

1. The caseload weighting is the total of all the question scores for the selected patient.
2. The patient is updated in the patient list with the calculated dependency and weighting score. The patient completed count is also updated.
3. The dependency score is calculated based on the caseload weighting score. The higher the weighting the higher the dependency. Dependency scores range from 1 to 4.
4. Care cluster information for the selected patient, which will include the latest SARN assessment scoring chart.
5. Click 'Next Patient' to automatically move.

Note: To select a specific patient the clinician must click the [Select] action button on the patient list.



NEW CASELOAD – continued:

Next Patient Selected

The example shows how the patient list is gradually updated with scores and the next patient selected in the list. As each patient is scored the [Select] action button is changed to an [Edit] button allowing previous patients scores to be updated if required.

The patient’s dependency scores are only saved when the last question has been scored. If the clinician selects another patient or leaves the caseload assessment screen the scores for the current patient will be lost. Completed patients are saved so the caseload assessment can be completed over a period of time, accessed through the “Caseload Clinician Selection” screen.

Mental Health Trust NHS
NHS Mental Health
USER: lee.larkin

CASELOAD ASSESSMENT: 03 September 2008 [Delete Assessment] **Clinician:** Duvall, E2 Dr. (RV9PCQGH) [View] [Change] **Patient:** Bayliss, Maria1 (999999999) [View]

Q1a	Q1b	Q1c	Q1d	Q2	Q3	Q4	Caseload Weighting

Q1A) CLIENT FACTORS - DISORDER/DIAGNOSIS/PRESENTATION

Consider if the client is acutely mentally ill; psychotic, depressed and/or anxiety state, have a dual diagnosis, bi-polar disorder or present with high risk behaviours and or personality disorder. Does the Clients have multiple health needs e.g. physical health needs, physical disability, hearing/sight impairments, epilepsy, and polypharmacology? Is the client's condition chronic / acute? Does he/she have changing needs? Do you co-work with a colleague? How able is the client in carrying out vital personal care and domestic routines (including management of household accounts, attending appointments etc, how much time do you spend supporting. Consider employment, occupation, social networks, family/ social roles and responsibilities. How able is the client in developing/maintaining these roles and responsibilities? How much help or support do you provide or organise in this area?

None (0) Slight (1) Moderate (2) Significant (3) Very Significant (4)

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Key Areas:

1. The progress panel is reset and the first question selected.
2. The completed scores have been updated.
3. The next patient that requires scoring is selected.
4. The [Edit] action button replaces the [Select] action button as the patient's dependency scores are completed.

NEW CASELOAD – continued:

Caseload Assessment Completed

When the last patient’s dependency scores have been entered the [\[Dependency Summary Report\]](#) action button is enabled (Key area: 5) at bottom of the patients list panel. Once completed the [\[Delete Assessment\]](#) button is hidden from the display as completed caseload assessments cannot be deleted.

In the example below the clinician has clicked the “Next Patient” button and a warning message dialog has been displayed stating that, “All patients have been completed. You may now run the dependency report by clicking [\[Dependency Summary Report\]](#) below the patient list”.

The screenshot shows the 'Caseload Measurement' interface for '03 September 2008'. At the top, it displays 'Mental Health Trust NHS' and 'USER: lee.larkin'. The main header indicates 'CASELOAD ASSESSMENT: 03 September 2008' and lists the 'Clinician: Duvall, E2 Dr. (RV9PCCQH)' and 'Patient: Allan, Elaine1 (9999999999)'. A table shows dependency scores for Q1a through Q4, with a total 'Caseload Weighting' of 15. Below this is a 'PATIENT DEPENDENCY SCORE' section with a 'DEPENDENCY' score of 3 and a 'Next Patient' button. A list of patients is shown on the left, with their NHS numbers, names, and scores. A warning dialog box is open, stating 'All patients have been completed. You may now run the dependency report by clicking [Dependency Summary Report] below the patient list'. The dialog has an 'OK' button. A '[Dependency Summary Report]' button is visible at the bottom of the patient list.

Key Areas:

1. All patients now have dependency scores.
2. [\[Delete Assessment\]](#) button is removed.
3. “Next Patient” button will now display a message highlighting the dependency summary report is now available.
4. Click “OK” to remove warning message dialog.
5. [\[Dependency Summary Report\]](#) action button, which when clicked will display the report.



NEW CASELOAD – continued:

Dependency Summary Report

The “Dependency Summary Report” is only available once all patients have been scored. When the [Dependency Summary Report] action button is clicked the progress panel and question panel are replaced by the summary report.

The report aggregates the total number of patients by their dependency score by care cluster. The care clusters listed on the left and the dependency scores across the top. The report can be printed by clicking the [Print Report] action button (Key area: 4) to produce a paper copy.

Mental Health Trust NHS
 USER: lee.larkin
 CASeload ASSESSMENT: 03 September 2008
 Clinician: Duvall, E2 Dr. (RV9PCCQH) [View] [Change]
 Patient: Bayliss, Maria1 (9999999999) [View]

Patients: 343 [Back to Selection...]
Completed: 343

NHS No:	Patient:	Score:
9999999999	...2	(3) 17 [Edit]
9999999999	Allan, Elaine1	(3) 16 [Edit]
9999999999	Allman, Roger1	(3) 17 [Edit]
9999999999	Anderson, Neil1	(3) 17 [Edit]
9999999999	Andrew, Gary1	(3) 18 [Edit]
9999999999	Azzopardi, Helen1	(3) 17 [Edit]
9999999999	Barber, Fiona1	(3) 20 [Edit]
9999999999	Barford, Ian1	(4) 24 [Edit]
9999999999	Barlow, Chris1	(1) 7 [Edit]
9999999999	Bartley, C1	(3) 15 [Edit]
9999999999	Bate, Alison1	(2) 10 5 [Edit]
9999999999	Bayliss, Maria1	(3) 16 [Edit]
9999999999	Beesley, Carol2	(3) 17 [Edit]
9999999999	Bell, Eric1	(2) 13 [Edit]
9999999999	Bennett, Julie1	(2) 12 [Edit]

Cluster	1	2	3	4	Total
-			1		1
1	23	6	1	5	35
2	7	7	3	4	21
3	5	3	2		10
4	7			1	8
5	27	12	4		43
6	2	7		3	12
7	4		3		7
8	7	3		5	15
9	5	4	1		10
10	8	3		1	12
11	21	10			31
12	4	3	2	1	10
13	4	2			6
14					0
15		7	2	3	12
16	4				4
17	18	12	2		32
18	26	4			30
19	10	4	3	1	18
20	11	3			14
21	12				12
Total	205	90	24	24	343

[Print Report]

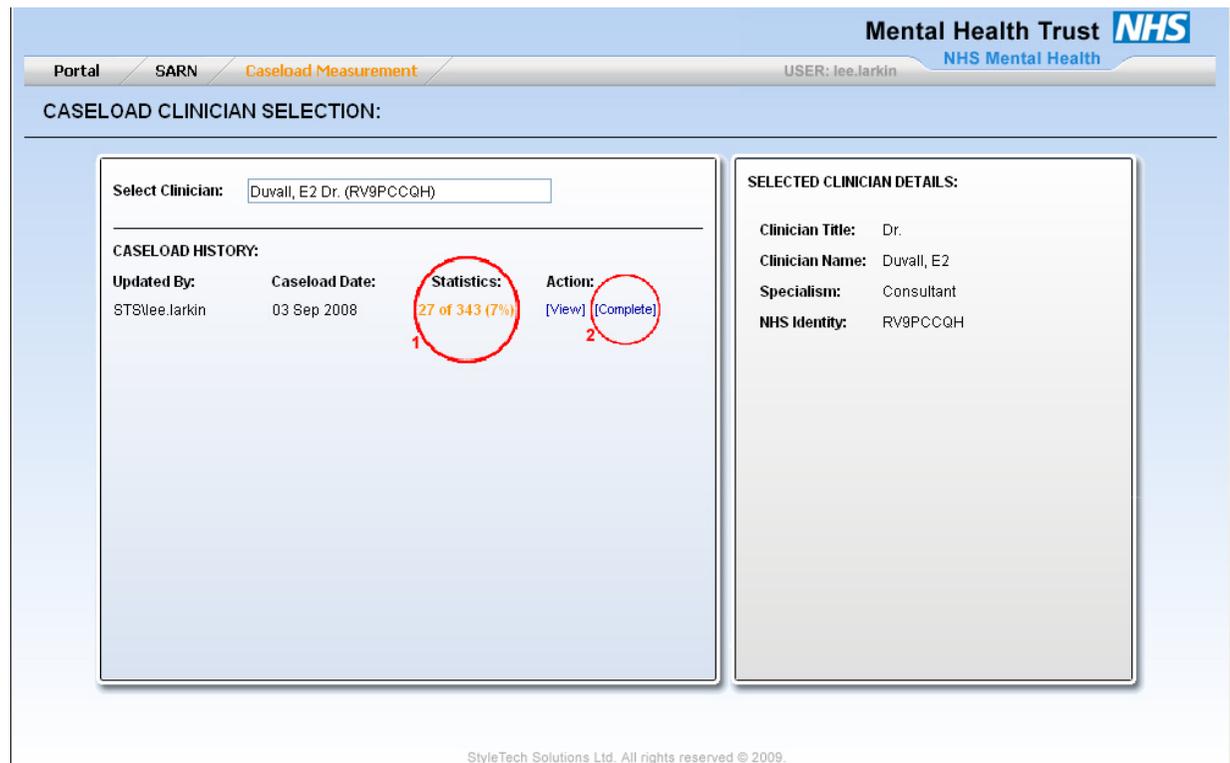
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Key Areas:

1. Dependency scores ranging from 1 – 4.
2. Total number of patients for the selected dependency score by care cluster.
3. Total number of patients.
4. [Print Report] action button will print the report details with the caseload assessment information i.e. clinician, caseload assessment date etc.
5. To close the report and return to the patient questions, click the [Edit] action button against the required patient on the patient list panel.

PARTIAL CASELOAD

It may take more than one visit to a caseload assessment before all patients have been scored. This is termed a partial caseload assessment and is displayed on the “Caseload History” with a [\[Complete\]](#) action button. Only the latest caseload will have a [\[Complete\]](#) action button.



Updated By	Caseload Date	Statistics	Action
STSllee.larkin	03 Sep 2008	27 of 343 (7%)	[View] [Complete]

Key Areas:

1. Partial caseloads display the number of patients scored and the percentage complete. A caseload is only complete when 100% of the patients have been scored.
2. [\[Complete\]](#) action button is only for a partial caseload assessment. When clicked the caseload assessment is loaded with the next non-scored patient selected.



CHANGE CASELOAD

A caseload assessment is complete when all patients have been scored. Once the caseload assessment has been completed it cannot be removed but it can be changed. The “Caseload History” displays all completed caseloads as 100% complete. The latest completed caseload assessment will have a [Change] action button, which when clicked will display the caseload assessment in update mode.

Key Areas:

1. A caseload is only complete when 100% of the patients have been scored.
2. [Change] action button is only for a complete caseload assessment. When clicked the caseload assessment is loaded. As all patients have been scored the clinician must select the patient from the patient list panel by clicking the [Edit] action button.



CHANGE CASELOAD – continued:

When the caseload assessment is displayed for change the progress panel and question panel are blank. To change a patient’s score the clinician must click the required patients’ [\[Edit\]](#) action button on the patient list panel. The progress panel is populated with the saved scores and the caseload weighting. The question (bottom right) panel displays the caseload weighting and dependency score details.

The clinician can then change any question score by clicking the question identifier in the progress panel i.e. **“Q1b”**. The question detail is loaded into the question panel so the score can be changed with the scoring buttons 0 – 4. Once the score has been changed the caseload weighting and dependency details are redisplayed to reflect the changes to the overall score.

Any changes are automatically saved and will be reflected in the “Dependency Summary Report”.

Mental Health Trust NHS
 USER: lee.jarkin
 CASeload Measurement
 CASELOAD ASSESSMENT: 03 September 2008
 Clinician: Duvall, EA Dr. (RV9PCCGH) [View] [Change]
 Patient: No Patient Selected [View]

Q1a	Q1b	Q1c	Q1d	Q2	Q3	Q4	Caseload Weighting

Patients: 343 [Back to Selection...]
 Completed: 343

NHS No:	Patient:	Score:	[Edit]
9999999992	(3) 17	[Edit]
999999999	Allan, Elaine1	(3) 16	[Edit]
999999999	Allman, Roger1	(3) 17	[Edit]
999999999	Anderson, Neil1	(3) 17	[Edit]
999999999	Andrew, Gary1	(3) 18	[Edit]
999999999	Azzopardi, Helen1	(3) 17	[Edit]
999999999	Barber, Fiona1	(3) 20	[Edit]
999999999	Barford, Ian1	(4) 24	[Edit]
999999999	Barlow, Chris1	(1) 7	[Edit]
999999999	Bartley, C1	(3) 15	[Edit]
999999999	Bate, Allison1	(2) 10	[Edit]
999999999	Bayliss, Maria1	(3) 16	[Edit]
999999999	Beesley, Carol2	(3) 17	[Edit]
999999999	Bell, Eric1	(2) 13	[Edit]
999999999	Rennett, Julie1	(2) 12	[Edit]

[Dependency Summary Report]

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Key Areas:

1. Caseload assessment displayed with no patient selected.
2. Progress panel is displayed blank.
3. [\[Edit\]](#) action button allows the patient scores to be reloaded. Clicking the question identifier allows a change to be made to an individual questions score.



VIEW CASELOAD

A caseload assessment can be viewed at any time although the “Caseload Dependency Report” is only available when the caseload assessment is fully complete. The view screen shows two reports:

- Patient Scoring Report
- Caseload Dependency Report

Patient Scoring Report

The patient scoring report displays a list of all patients for the selected caseload assessment. The report lists the patients in alphabetical order and shows the scores for each individual question, the caseload weighting score, the calculated dependency score and the latest SARN assessment care cluster.

The screenshot shows the 'Caseload Measurement' interface for a 'CASELOAD ASSESSMENT' on 03 September 2008. The interface includes a navigation bar with 'Portal', 'SARN', and 'Caseload Measurement' tabs. The user is identified as 'USER: lee.larkin'. The assessment is for 'Clinician: Duvall, E2 Dr. (RV9PCCQH)'. The report is titled 'PATIENT SCORING REPORT: Patients: 343 Completed: 343'. The table below lists patients with columns for questions Q1a through Q4, Weight, Dependency, and Care Cluster. Action buttons for '[Caseload Details]', '[View]', and '[Dependency Report]' are visible. Red circles highlight specific elements: 1. [Caseload Details] button, 2. [View] button, 3. Completed count (343), 4. [Dependency Report] button, 5. Patient name (Barber, Fiona), 6. Weight column, 7. Dependency column.

Patient	Q1a	Q1b	Q1c	Q1d	Q2	Q3	Q4	Weight	Dependency	Care Cluster
... ..2	1	2	3	2	2	3	4	17	3	Awaiting Assessment
Allan, Elaine1	1	2	3	1	3	4	2	16	3	Awaiting Assessment
Allman, Roger1	2	3	4	3	2	1	2	17	3	Awaiting Assessment
Anderson, Neil1	2	3	4	2	1	2	3	17	3	Awaiting Assessment
Andrew, Gary1	2	3	4	3	2	1	3	18	3	Awaiting Assessment
Azzopardi, Helen1	2	1	2	3	4	3	2	17	3	Awaiting Assessment
Barber, Fiona1	3	4	2	3	3	2	3	20	3	Awaiting Assessment
Barford, Jan1	4	4	4	4	3	2	3	24	4	Awaiting Assessment
Barlow, Chris1	0	1	2	1	0	1	2	7	1	Awaiting Assessment
Bartley, C1	2	3	2	1	2	3	2	15	3	Awaiting Assessment
Bate, Alison1	2	1	2	1	1	2	1	10	2	Awaiting Assessment
Bayliss, Maria1	1	2	3	4	1	2	3	16	3	Awaiting Assessment
Beesley, Carol2	3	2	4	3	2	1	2	17	3	Awaiting Assessment
Bell, Eric1	1	0	1	2	4	3	2	13	2	Awaiting Assessment
Bennett, Julie1	2	3	3	1	0	1	2	12	2	Awaiting Assessment
Berry, Lynda1	2	1	3	4	3	1	0	14	2	Awaiting Assessment
Betts, Catherine1	1	2	3	4	3	2	3	18	3	Awaiting Assessment
Beverley, Peter1	0	1	2	1	3	2	4	13	2	Awaiting Assessment
Bhavsar, .1	0	1	2	3	4	3	1	14	2	Awaiting Assessment
Billows, Mark0	0	1	2	1	0	1	3	8	2	Awaiting Assessment
Bishop, Paul1	1	2	1	2	3	2	1	12	2	Awaiting Assessment

Key Areas:

1. [Caseload Details] action button displays high level information such as percentage completed and last update user.
2. [View] action button for clinician details.
3. Number of patients completed.
4. [Dependency Report] action button displays the report in the panel below.
5. Patient list showing scores for each question.
6. Final weighting score for each patient.
7. Final dependency scores for each patient.



VIEW CASELOAD – continued:

Caseload Dependency Report

The caseload dependency report aggregates the total number of patients by their dependency score by care cluster.

Mental Health Trust NHS
NHS Mental Health
USER: lee.larkin

Portal SARN Caseload Measurement
CASELOAD ASSESSMENT: 03 September 2008 [Caseload Details] Clinician: Duvall, E2 Dr. (RV9PCCQH) [View] [Change]

CASELOAD DEPENDENCY REPORT: [Print Report] [Patient Scoring Report] [Dependency Report] [Back to Selection...]

Cluster	1	2	3	4	Total
-			1		1
1	23	6	1	5	35
2	7	7	3	4	21
3	5	3	2		10
4	7			1	8
5	27	12	4		43
6	2	7		3	12
7	4		3		7
8	7	3		5	15
9	5	4	1		10
10	8	3		1	12
11	21	10			31
12	4	3	2	1	10
13	4	2			6
14					0
15		7	2	3	12
16	4				4
17	18	12	2		32
18	26	4			30
19	10	4	3	1	18
20	11	3			14
21	12				12
Total	205	90	24	24	343

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Key Areas:

1. [Print Report] action button prints a paper copy.
2. [Patient Scoring Report] action button displays the report in the panel below.