

## Adults Quick Guide

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### Visits

The **Visits** section, in the sidebar menu on a person's record, is not used to record details of any visits but can be used to view some historic visit information.

If a visit has taken place, where appropriate, you should record an **AC Visit Note** case note within the **Case notes** section in the sidebar menu. Or, you can record details of the visit within relevant workflow steps e.g. Adult Conversation Record, Adult OT Casework Record etc.

### Viewing Historic Visit Details

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Historic visit details can be viewed by clicking **Visits** in the sidebar menu.

The **Visits** screen will display - this screen shows a list of the visits that have previously taken place.

The screen will list the following information for each visit:

- Planned date and time
- Whether the visit took place or not
- Actual date and time (if the visit took place)
- The worker who was scheduled to attend/attended the visit and their team

It is important to remember the use of the **Visits** section was optional for Adult Care so while the **Visits** screen will provide a list of historic visits recorded within the section you should also use the **Case notes** section and any relevant forms within the **Documents** section to obtain a complete picture of the number of visits that have taken place.

To view the details of individual visits within the **Visits** screen click the **Visit Planned date/time** hyperlink.

The **Person visit** screen will display - this screen shows a summary of the visit containing:

- Whether or not the visit took place
- The planned date and time of the visit
- The actual date and time of the visit (if it took place)
- The reason the visit did not happen (if it did not take place)
- The reason the date/time was changed (if the visit took place at a different date/time to when it was scheduled)
- Whether or not the person was seen alone during the visit
- The type of visit

## Filtering the list of Visits

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You can filter the list of visits with the Visits screen by clicking the **Find visits** button and specifying search criteria.

The search criteria options (to use one or as many criteria as necessary) are:

- Planned date range – enter relevant dates
- Actual date range – enter relevant dates
- Worker/Organisation – select from dropdown menu
- Team – select from dropdown menu
- Include visits of related people – tick checkbox to include
- Include visits which took place only – tick checkbox to include

Once the criteria have been entered you should click the **Find** button to display the filtered list of visits.