BrisDoc Patient care by people who care

NHS

SevernSide

Integrated Urgent Care

# Cleo Action & Audit Guide

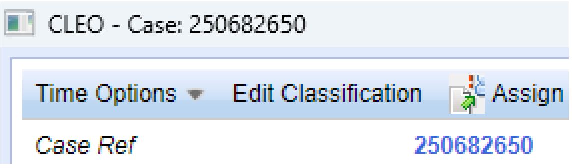
| Version: | Owner: | Created: |
|---|---|---|
| V1.1 | Chelsea Stevens | 27/06/2025 |
| **Published:** | **Approving Service Lead:** | **Next Review** |
| 31/07/2025 | Lucy Grinnell | 21/07/2026 |

# Contents

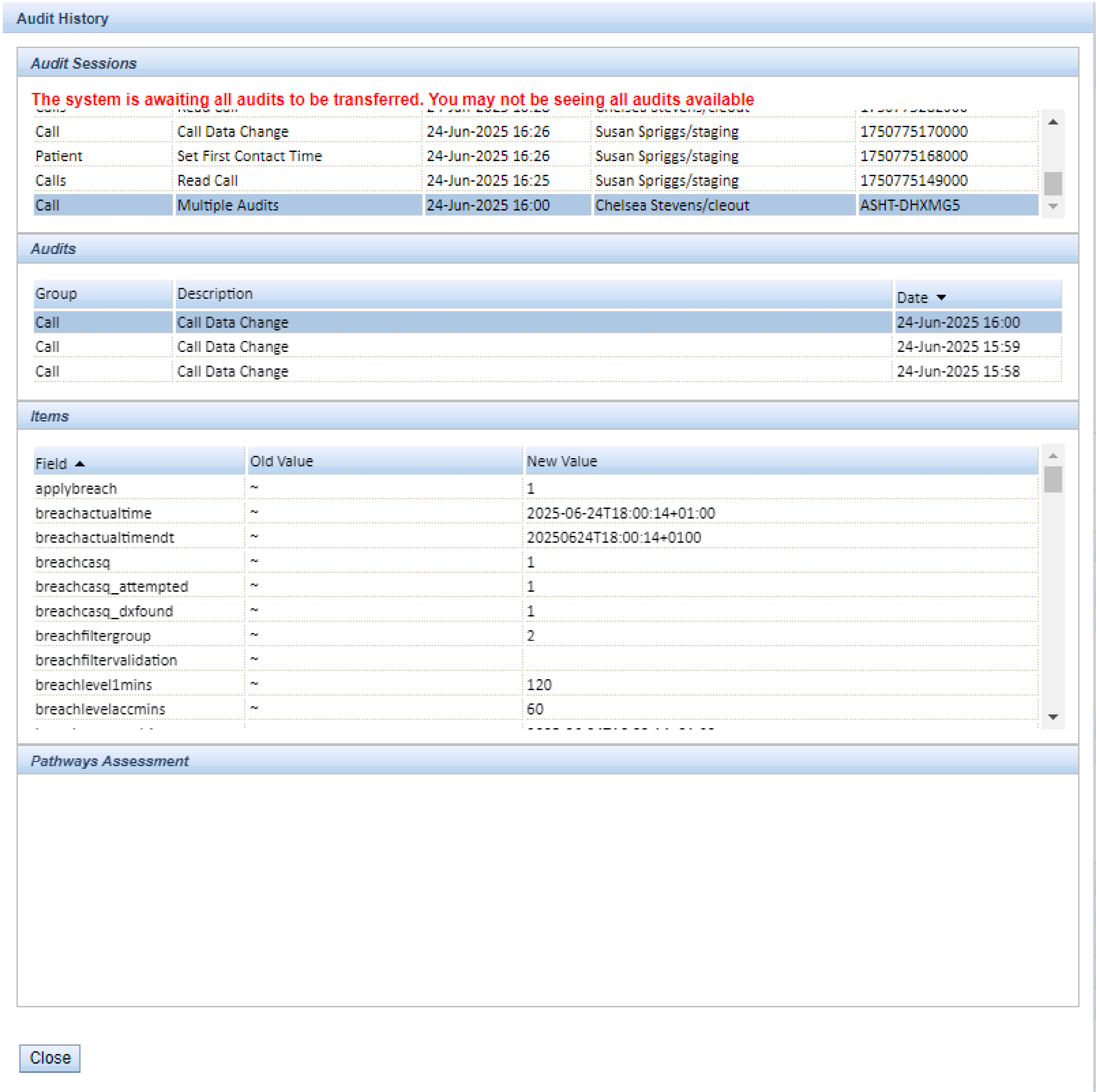
# Cleo Audit Introduction

## Accessing Cleo Case Audits (Event List)

The Cleo Audit allows you to view any actions carried out within the case. To access the audit, firstly open the case you would like to review. In the top left-hand corner of the case, the CLEO Case Reference appears in blue.




Clicking this will launch the Audit History window;



## Audit Window Panels

The Cleo Audit is split into four panels;

- **Audit Sessions**
  This is where groups of audits are stored. In CLEO, multiple actions can occur simultaneously. Therefore, if multiple actions occur at once, they will be grouped together. For audits to be grouped together they must all occur within the same minute. (i.e. all actions that occur at 11:15 will be grouped together. Any actions occurring on 11:14 or 11:16 will then begin a new group of audits) This view will provide a brief description of what change was made, the date/time the change was made, and the user that carried out the change.

- **Audits**
  If you have selected a group of audits from within the Audit Sessions section, the Audits panel will appear. This will allow you to select a specific audit from that group that you would like to inspect. These audits are listed in time order, with the most recent action appearing at the top of the list.

- **Items**
  The Items panel lists all the changes that were made to the case during the selected audit action. The panel will typically display these changes via two columns: *Old Value* and *New Value*. The *Old Value* column will display what data/state the field was before this change as made, and the *New Value* column will display the newly set value.

- **Pathways Assessment**
  The final panel will display the Pathways/PaCCS assessment that is present on the case. If the case does not have any Pathways/PaCCS data, this section will remain blank.

  p

## Reviewing Audits

We begin by selecting our Audit Session within the top panel. We can identify what the audit will contain by the description listed. Please find examples below of common audits:

**New Call** – This indicates that the audit is for the entry of the case into the system, whether this be manual entry via our Call Handlers or via 111.

**Read Call** – This indicates that the user listed against the audit has opened the case and viewed the contents.

**Multiple Audits** – This indicates that more than one action occurred at the listed moment in time. Selecting this will present the Audits panel to select from.

**Set First Contact Time** – This indicates that a Clinical user has entered the case and has clicked the Start Consultation button.

**Call Data Change** – This indicates that data within the case has changed. This will be clearer when you inspect the Items panel

**Audit Read** – This indicated that the user listed against the audit has reviewed the CLEO Case Audit.

**Finish Consultation** – This indicates that the user listed against the audit has ended a consultation, via Save & Return to Queue, Selecting a Follow Up action (F2F, Home Visit or CC Follow by the CC) or via End Assessment.

**Call Complete** – This indicates that the user listed against the audit has marked the case as complete.

Once we have selected our audit from the Audit Sessions/Audits panel(s), we can inspect the detail of the audit within the Items panel.

*Items*

| | | |
|---|---|---|
| callfaction | ~ | |
| callsassigneeyn | No | |
| callstatus | New | Completed |
| callstatusvalue | 1 | 2 |
| callwithvehicle | No | |
| callwithvehicleackyn | No | |
| consult_session_id | 20250516103228584 | 20250516103256110 |
| cpl_action | SAVE_AND_RETURN_TO_QUEUE | COMPLETE |
| cpl_exitreason | FAILED_CONTACT | |
| cpl_failedcontactwarning | SAVE_AND_RETURN_TO_QUEUE | |
| cpl_managedhow | 1-VirtualConsultTelOnly | |
| dispatch_vehicle | ~ | |

The example above shows a change in status from *New* to *Completed* for the **callstatus** item. This is particularly helpful when reviewing case audits, as it provides a clear view of the data that existed in the case before the change was recorded.

## Important Notes / Considerations

Below are items that should be considered when reviewing CLEO Audits:

- CLEO Audits are not instantaneous and can take a few moments to update before the very latest actions are listed. It takes anywhere up to 15 minutes after an action has taken place for it to be available to view in the Audit History window.

- When an action is listed as being conducted by Code Signer, this pertains to the back-end CLEO system. Any actions listed under this user are automated process that run as the case progresses through CLEO. End users do NOT conduct these actions.

- When selecting a Multiple Audits session from within the Audit Sessions panel, the user listed against the session may not necessarily be responsible for all audits in that section. Whilst typically the user will be responsible for all the actions in the group, you should exercise caution and read the details of the audits to confirm which user carried out the action.

## Closing the Audit History Window

Once you have finished reviewing the CLEO Case Audits, you can return to the underlying CLEO case with the **Close** button

# Cleo Actions & Audits

This section will give some guidance on the steps taken within Cleo & detail how this will be recorded within the Audit.

## New Case added to the system (Severnside Call Handler)

**Cleo Action;**

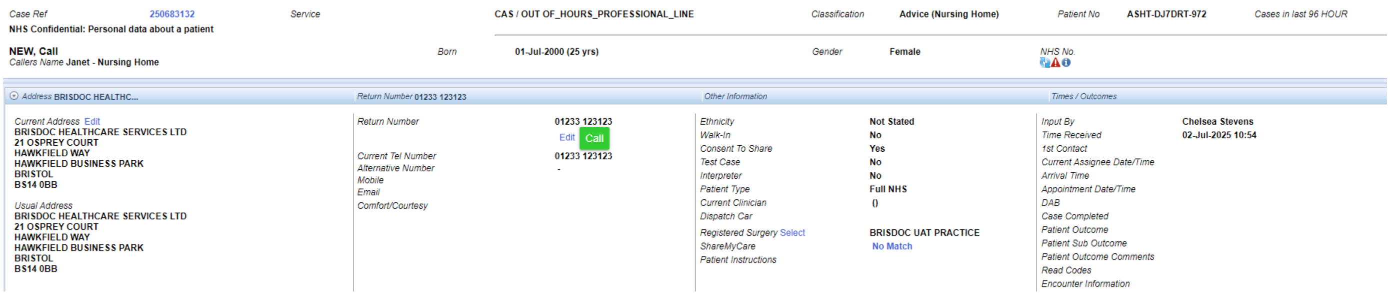
In the CAS Queue> Select the **New Call** button> choose the appropriate Sub-service and follow the case entry process> once the case has been added, this will show in the appropriate place in the CAS queue (ordered by breach time)

**Cleo Audit;**

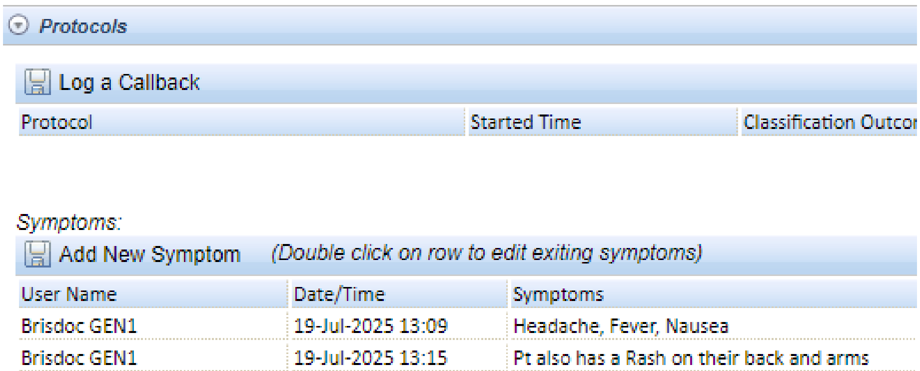
This information can be seen by double clicking into the case.

In the header section you will be able to see the Sub Service of the case, patient details, the name of the caller, the Relationship to Caller and any sub-classification automatically added to the case.

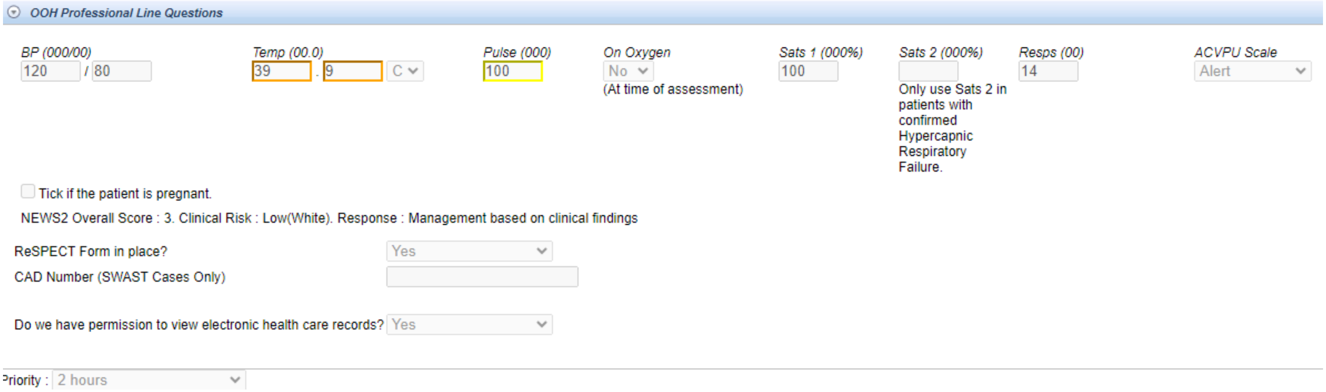
Under the Times / Outcomes section it will detail the User who Input the call along with the time and date this was carried out.




In the **Add Symptoms** section it will tell you who entered the symptoms (and therefore the call), including the date, time, and symptoms entered. Additional symptoms can be added by the same, or other users at any time; these updated details will be recorded underneath the original symptoms.



If you navigate further through the Panels, you will see a set of questions & answers specific to the Sub-service the case was entered as for example; OOH Professional Line, Weekday Professional Line etc; Frailty etc


OOH Professional Line Questions

BP (000/00): 120 / 80
Temp (00.0): 39 . 9 C
Pulse (000): 100
On Oxygen: No (At time of assessment)
Sats 1 (000%): 100
Sats 2 (000%): Only use Sats 2 in patients with confirmed Hypercapnic Respiratory Failure.
Resps (00): 14
ACVPU Scale: Alert

Tick if the patient is pregnant.
NEWS2 Overall Score : 3. Clinical Risk : Low(White). Response : Management based on clinical findings

ReSPECT Form in place? Yes
CAD Number (SWAST Cases Only)

Do we have permission to view electronic health care records? Yes

Priority : 2 hours

The above can all be viewed in the Audit, under the first **Multiple Audit** registered against the case.

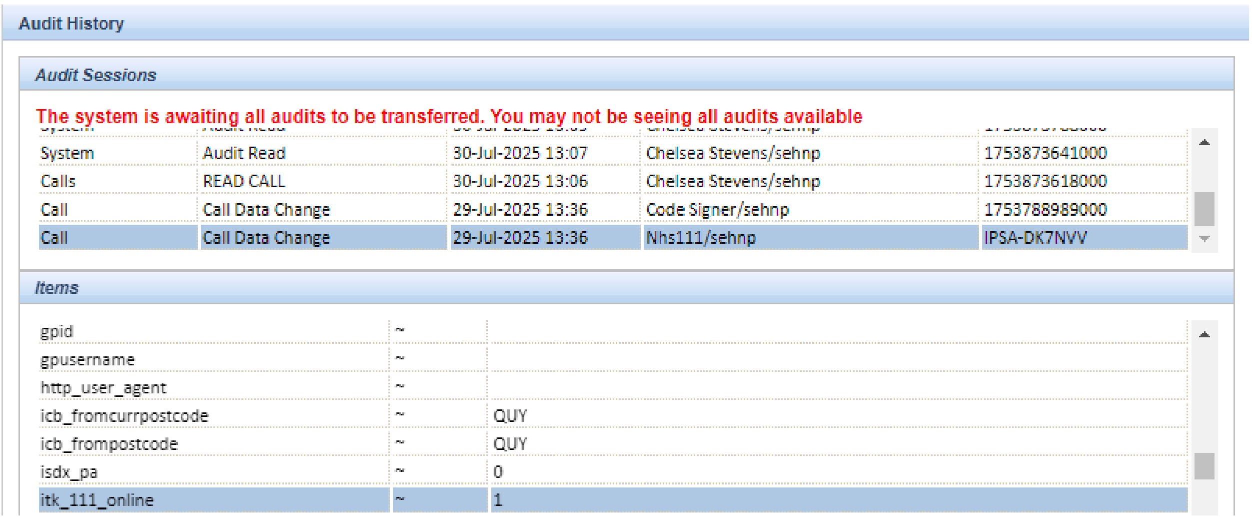
## Case received by 111

When a case is received via 111, there will be no sub-service. This will simply be a Service of **CAS.** Additionally, If a case is from 111 online, this will be indicated by the @ symbol on the CAS queue.

**Cleo Audit;**

- **Case received from 111 Online**

This will be recorded under the **itk_111_online** item (Value of 1), within the Nhs111 Audit Session. This will be the first Audit Session on the case and will be recorded as below;


Audit History

Audit Sessions

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| System | Audit Read | 30-Jul-2025 13:07 | Chelsea Stevens/sehnp | 1753873641000 |
| Calls | READ CALL | 30-Jul-2025 13:06 | Chelsea Stevens/sehnp | 1753873618000 |
| Call | Call Data Change | 29-Jul-2025 13:36 | Code Signer/sehnp | 1753788989000 |
| Call | Call Data Change | 29-Jul-2025 13:36 | Nhs111/sehnp | IPSA-DK7NVV |

Items

| | | |
|---|---|---|
| gpid | ~ | |
| gpusername | ~ | |
| http_user_agent | ~ | |
| icb_fromcurrpostcode | ~ | QUY |
| icb_frompostcode | ~ | QUY |
| isdx_pa | ~ | 0 |
| itk_111_online | ~ | 1 |

You will also be able to see this by looking at the Pathways received, which will show the Selected service as 111 Online as below;

**Pathways Disposition**

**Disposition:**
To Contact a Primary Care Service within 2 hours(Dx05)
**Selected care service:**
(CLEO) 111 Online OOH Callback - Severnside 111 Primary Care Callback - BNSSG

- **Case received from 111 (telephone call)**

This will be recorded within the first Nhs111 Audit Session. **Nhs111/sehnp** informs us that the case has been received by 111. The **itk_111_online** item with a value of 0, informs us that this was not an online case;

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| System | Audit Read | 30-Jul-2025 13:11 | Chelsea Stevens/sehnp | 1753873914000 |
| Calls | READ CALL | 30-Jul-2025 13:11 | Chelsea Stevens/sehnp | 1753873885000 |
| Call | Call Data Change | 29-Jul-2025 13:36 | Code Signer/sehnp | 1753788969000 |
| Call | Call Data Change | 29-Jul-2025 13:36 | Nhs111/sehnp | IPSA-DK7NVD |

*Items*

| | | |
|---|---|---|
| icb_frompostcode | ~ | QUY |
| isdx_pa | ~ | 0 |
| itk_111_online | ~ | 0 |
| itk_111_online_to_111 | ~ | 0 |
| itk_dx | ~ | Dx333 |
| itk_x_effusername | ~ | CN\Nhs111/O\sehnp |
| iuc_cas_at_one_time | ~ | 1 |
| iuc_cas_view_flag | ~ | 1 |

You will also be able to see this by looking at the Pathways received, which will show the Selected service.

## Successful & Unsuccessful contact (safety call by the Ops team)

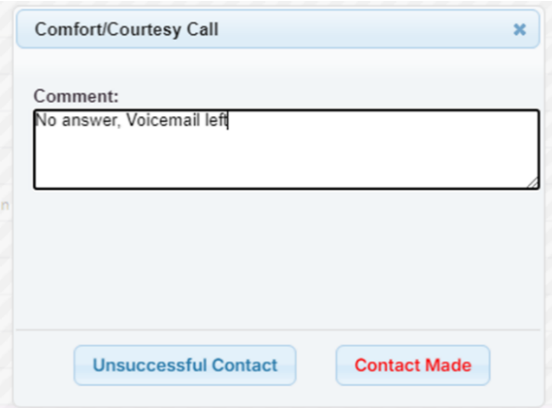
**Cleo Action;**

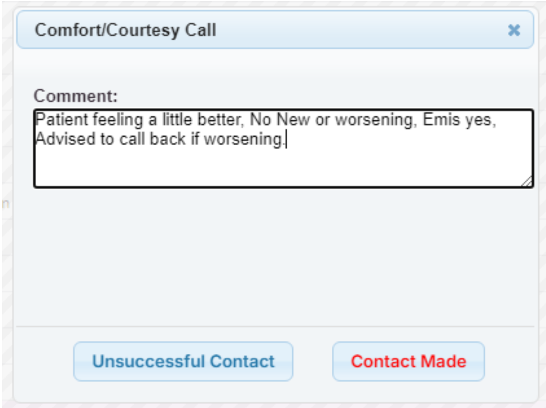
Right click on the case > select **Comfort / Courtesy Call**>

| | | |
|---|---|---|
| -1d 15h | 250670354 | CAS: BrisDoc |
| -1d 15h | 250670355 | CAS: BrisDoc |
| -1d 15h | 250670356 | CAS: BrisDoc |
| | 250670361 | CAS: BrisDoc |
| -2h 8m | 250670381 | CAS: Patient Lin |
| 1h 6m | 250670403 | CAS: OOHsPL |
| 1h 30m | 250670418 | CAS: OOHsPL |
| 1h 52m | 250670424 | CAS: Patient Lin |
| 1h 56m | 250670425 | CAS: Patient Lin |
| 4h 11m | 250670383 | CAS: BrisDoc |
| 6h 49m | 250670372 | CAS: BrisDoc |
| 9h 46m | 250670382 | CAS: BrisDoc |

Case Comments
Comfort / Courtesy Call
Edit Classification
Priority
Unlock Call
Print
Dispatch To Vehicle
Send SMS
Request Photo

Add your notes> select **Unsuccessful Contact** or **Contact Made**



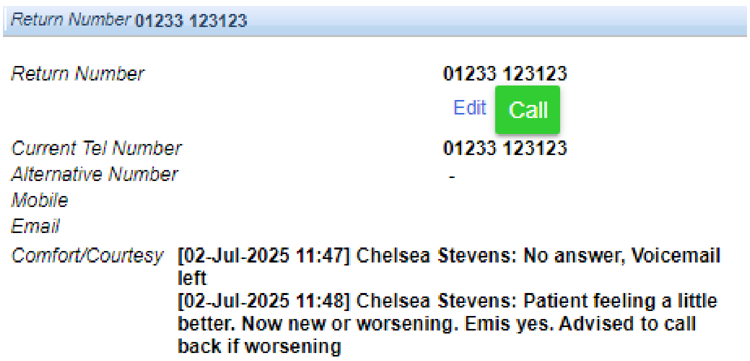

The window will close.

In the CAS queue, a successful contact will show with a red heart.


An unsuccessful contact will show with a purple heart.


**Cleo Audit;**

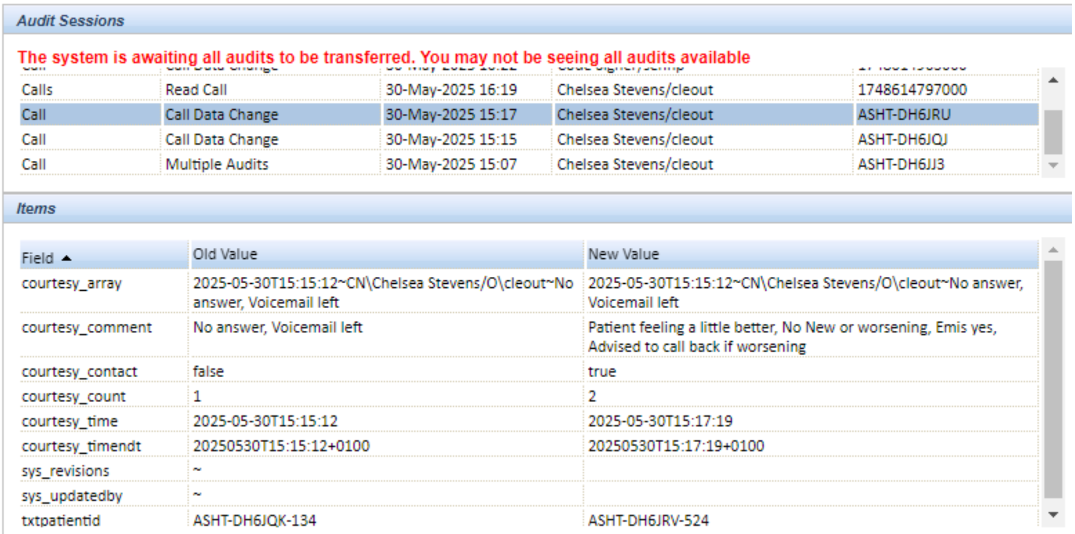
The quickest place to view Courtesy / Comfort calls that have been carried out, is by double clicking into the case and navigating to the Comfort / Courtesy call section. This will detail the date, time, user & comments added.


*Return Number* 01233 123123

| | |
|---|---|
| *Return Number* | 01233 123123<br>Edit Call |
| *Current Tel Number* | 01233 123123 |
| *Alternative Number* | - |
| *Mobile* | |
| *Email* | |
| *Comfort/Courtesy* | [02-Jul-2025 11:47] Chelsea Stevens: No answer, Voicemail left<br>[02-Jul-2025 11:48] Chelsea Stevens: Patient feeling a little better. Now new or worsening. Emis yes. Advised to call back if worsening |

You can also find this information in the Audit, where it appears as **courtesy_contact** with a value of either *True* or *False*.

In the example below, under the items panel, the *Old Value* for **courtesy_contact** is *false* and the *New Value* is *true*. This indicates that the case initially had an unsuccessful contact, which has now been updated to a successful one.
Within the same audit session, the **courtesy_array** item will show the date, time, user, and any comments added during the courtesy call.


Audit Sessions

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Calls | Read Call | 30-May-2025 16:19 | Chelsea Stevens/cleout | 1748614797000 |
| Call | Call Data Change | 30-May-2025 15:17 | Chelsea Stevens/cleout | ASHT-DH6JRU |
| Call | Call Data Change | 30-May-2025 15:15 | Chelsea Stevens/cleout | ASHT-DH6JQJ |
| Call | Multiple Audits | 30-May-2025 15:07 | Chelsea Stevens/cleout | ASHT-DH6JJ3 |

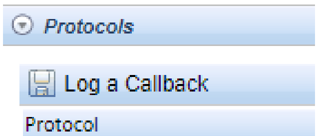
Items

| Field ▲ | Old Value | New Value |
|---|---|---|
| courtesy_array | 2025-05-30T15:15:12~CN\Chelsea Stevens/O\cleout~No answer, Voicemail left | 2025-05-30T15:15:12~CN\Chelsea Stevens/O\cleout~No answer, Voicemail left |
| courtesy_comment | No answer, Voicemail left | Patient feeling a little better, No New or worsening, Emis yes, Advised to call back if worsening |
| courtesy_contact | false | true |
| courtesy_count | 1 | 2 |
| courtesy_time | 2025-05-30T15:15:12 | 2025-05-30T15:17:19 |
| courtesy_timendt | 20250530T15:15:12+0100 | 20250530T15:17:19+0100 |
| sys_revisions | ~ | |
| sys_updatedby | ~ | |
| txtpatientid | ASHT-DH6JQK-134 | ASHT-DH6JRV-524 |

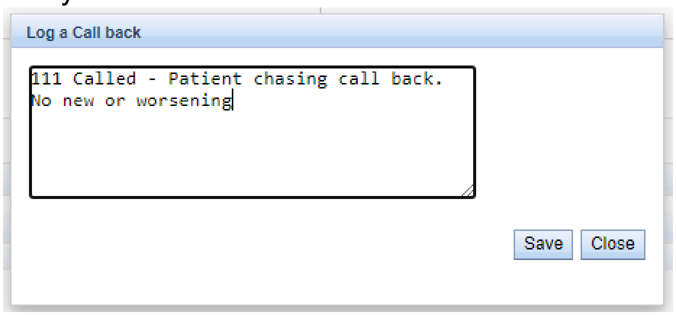
## Log a Call back

**Cleo Action;**

Double click into the case> under the protocols banner select **Log a Callback**>

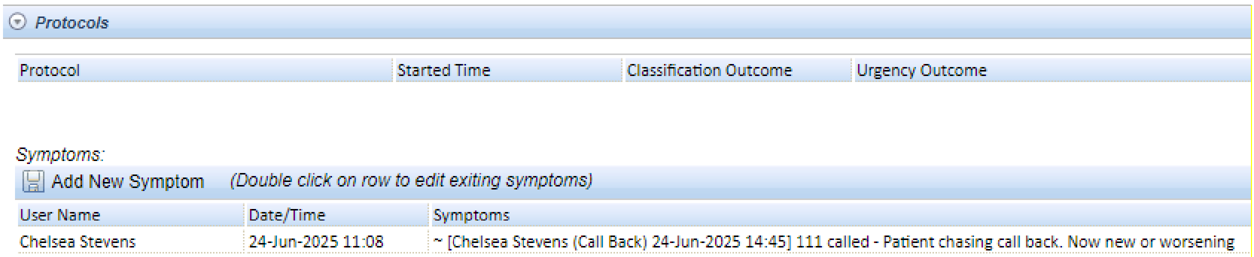



add your notes in the free text box > **Save**




**Cleo Audit;**

The quickest place to see if a call back has been logged is within the case under the Protocols panel, this will state '(Call Back)' as below;


Protocols

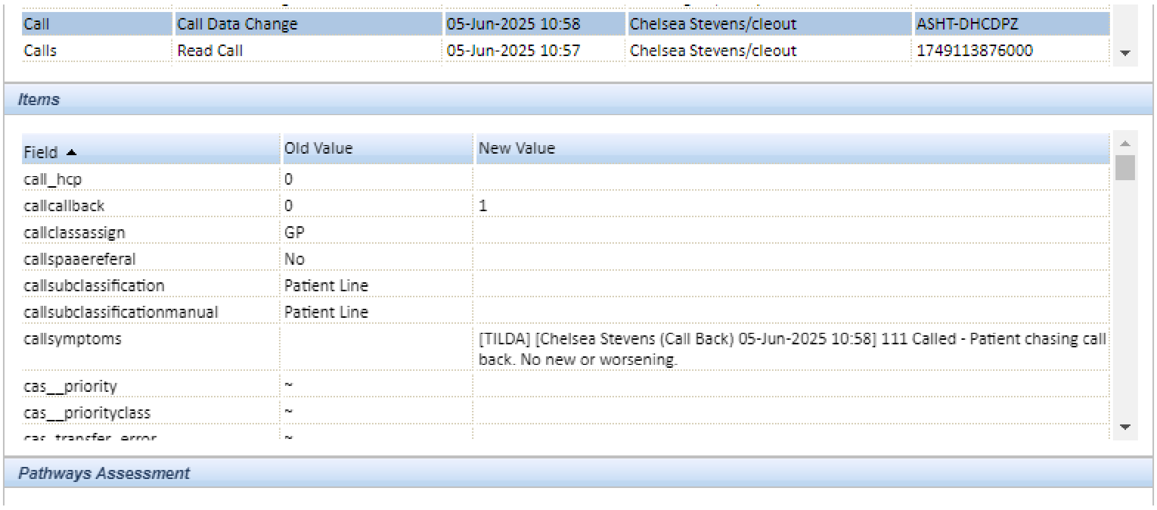
| Protocol | Started Time | Classification Outcome | Urgency Outcome |
|---|---|---|---|

Symptoms:

Add New Symptom (Double click on row to edit exiting symptoms)

| User Name | Date/Time | Symptoms |
|---|---|---|
| Chelsea Stevens | 24-Jun-2025 11:08 | ~ [Chelsea Stevens (Call Back) 24-Jun-2025 14:45] 111 called - Patient chasing call back. Now new or worsening |

You can also view this within the Audit – this will be recorded as **callcallback** and it will have a *New Value*, which is higher than the *Old Value.* The **callsymptoms** item will have a *New Value* which details the date, time, user & note added to the case.



| | | | | |
|---|---|---|---|---|
| Call | Call Data Change | 05-Jun-2025 10:58 | Chelsea Stevens/cleout | ASHT-DHCDPZ |
| Calls | Read Call | 05-Jun-2025 10:57 | Chelsea Stevens/cleout | 1749113876000 |

Items

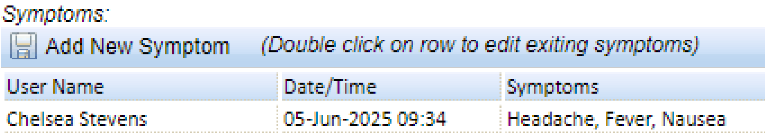
| Field | Old Value | New Value |
|---|---|---|
| call_hcp | 0 | |
| callcallback | 0 | 1 |
| callclassassign | GP | |
| callspaaereferal | No | |
| callsubclassification | Patient Line | |
| callsubclassificationmanual | Patient Line | |
| callsymptoms | | [TILDA] [Chelsea Stevens (Call Back) 05-Jun-2025 10:58] 111 Called - Patient chasing call back. No new or worsening. |
| cas__priority | ~ | |
| cas__priorityclass | ~ | |

Pathways Assessment

## Add New Symptoms

**Cleo Action;**

Double click into the case> navigate to & select the **Add New symptom** button

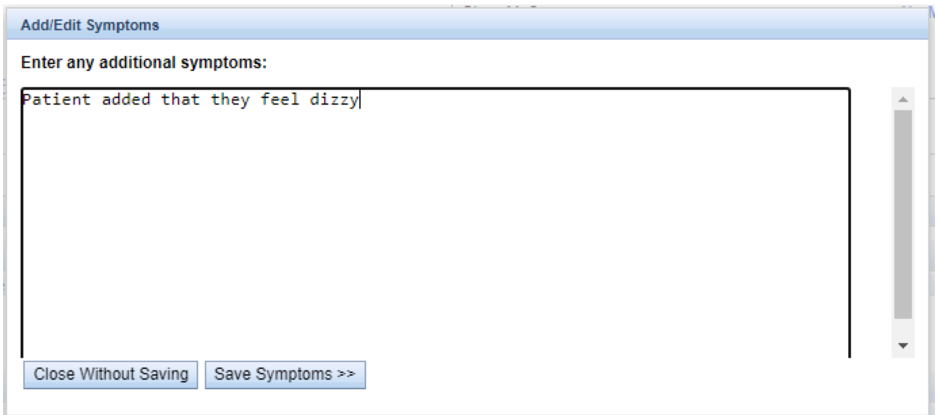


*Symptoms:*

Add New Symptom *(Double click on row to edit exiting symptoms)*

| User Name | Date/Time | Symptoms |
|---|---|---|
| Chelsea Stevens | 05-Jun-2025 09:34 | Headache, Fever, Nausea |

Type the updated symptom information in the free text box> **Save** symptoms




**Cleo Audit;**

The additional symptoms will now show underneath the initial symptoms on the case

*Symptoms:*

Add New Symptom *(Double click on row to edit exiting symptoms)*

| User Name | Date/Time | Symptoms |
|---|---|---|
| Chelsea Stevens | 05-Jun-2025 09:34 | Headache, Fever, Nausea |
| Chelsea Stevens | 05-Jun-2025 14:29 | Patient added that they feel dizzy |

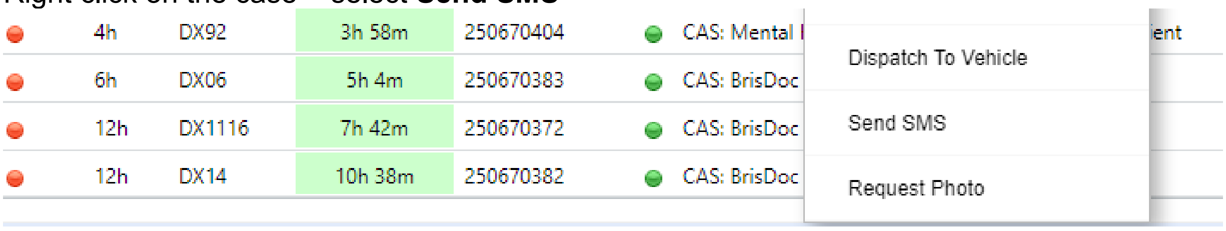
You can also view this in the Audit under **callsymptoms**, this will have a *New Value*, which will detail the notes added, along with the time, date and user who carried out the action.

| Field ▲ | Old Value | New Value |
|---|---|---|
| callpregnant | No | |
| callsymptoms | Headache, Fever, Nausea | Headache, Fever, Nausea[TILDA] [Chelsea Stevens 05-Jun-2025 14:29] Patient added that they feel dizzy |
| chub_checknamedob | | PLEASE_SELECT |
| chub_tele | | PLEASE_SELECT |
| cpis_retrieve_issued | 2025-06-05T13:52:50+01:00 | 2025-06-05T13:52:50 01:00 |
| cpis_search_issued | 2025-06-05T09:34:34+01:00 | 2025-06-05T09:34:34 01:00 |
| cpl_action | SAVE_AND_RETURN_TO_QUEUE | |
| cpl_exitreason | NO_ACTION_TAKEN | |
| flag_complete | 0 | |

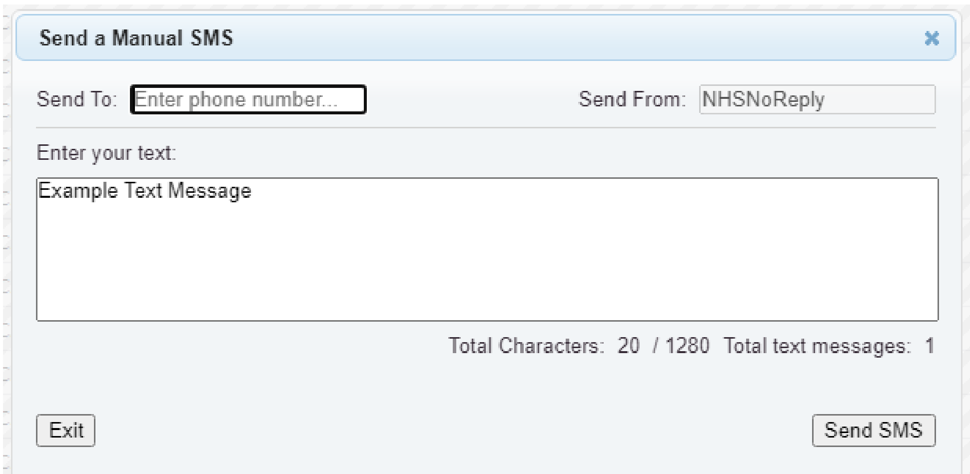
## Send SMS (Successful)

**Cleo Action;**

Right click on the case > select **Send SMS**>




If the return number on the case is a mobile number, this will auto populate in the box below. If not, you will need to add this manually. Enter the text message you wish to send & click send SMS.



Clinicians are also able to send an SMS once they have double clicked into the case. Navigate to the top toolbar and select Send SMS.

When you return to the CAS queue view, the green SMS Icon will appear on the case; 

**Cleo Audit;**

For a successful SMS, the **sms_count** and **sms_sent** values will match in the Audit. In this section you will also be able to see the date and time the message was sent, the SMS content, and the Cleo user who performed the action.

| Field ▲ | Old Value | New Value |
|---|---|---|
| sms_count | ~ | 1 |
| sms_has | ~ | 1 |
| sms_latest_at | ~ | 20250530T14:20:26+0100 |
| sms_latest_message | ~ | Example Text Message |
| sms_latest_user | ~ | CN\Chelsea Stevens/O\cleout |
| sms_sent | ~ | 1 |

## Send SMS (Failed)

**Cleo Audit;**

**Sms_count** will tell you how many SMS actions have been performed, however the **sms_sent** field will tell you how many were successful. The below shows 0 sent, which means this was a failed SMS.

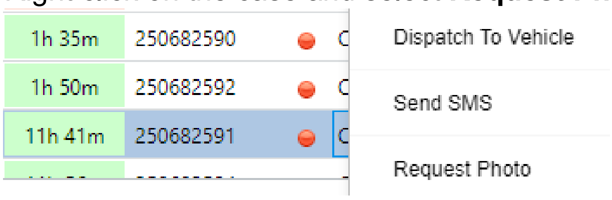
| Field ▲ | Old Value | New Value |
|---|---|---|
| sms_count | ~ | 1 |
| sms_has | ~ | 1 |
| sms_latest_at | ~ | 20250520T10:50:45+0100 |
| sms_latest_message | ~ | Test text message - Adding more characters |
| sms_latest_user | ~ | CN\Chelsea Stevens/O\cleout |
| sms_sent | ~ | 0 |

## Request Photo

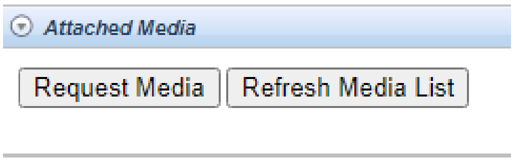
**Cleo Action;**

You can request a photo two ways within Cleo;

1. Right click on the case and select **Request Photo**




2. Double click into the case> Navigate to the **Attached Media** tab> Select **Request Media**




Both of these actions will bring up a new window> enter the phone number> click **Confirm**;


The grey camera Icon will show against the case, to indicate they have been requested 

**Cleo Audit;**

The action of requesting a Photo will be recorded under the *New Value* for **goodsam_image_status**, this will include the date and time this was carried out & the user who carried out the action.

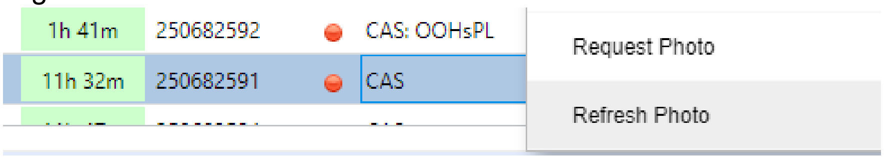
| Field ▲ | Old Value | New Value |
|---|---|---|
| goodsam_image_status | | REQUESTED |
| goodsam_image_time | ~ | 20250623T14:37:15+0100 |
| goodsam_image_user | ~ | CN\Chelsea Stevens/O\cleout |

## Refresh Media (Attach Photo)

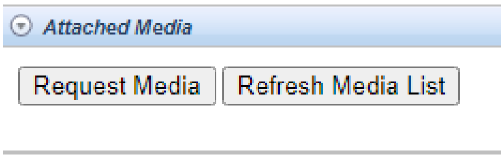
**Cleo Action;**

You can refresh media two ways within Cleo;

1. Right Click on the case and select **Refresh Media**



2. Double click into the case> Navigate to the **Attached Media** tab> Select Refresh Media List




The green camera Icon will show against the case to indicate they have been added

**Cleo Audit;**

The action of receiving a Photo will be detailed under the *New Value* for **goodsam_image_status**, this will be recorded as **RECEIVED**

| Field ▲ | Old Value | New Value |
|---|---|---|
| goodsam_image_status | REQUESTED | RECEIVED |

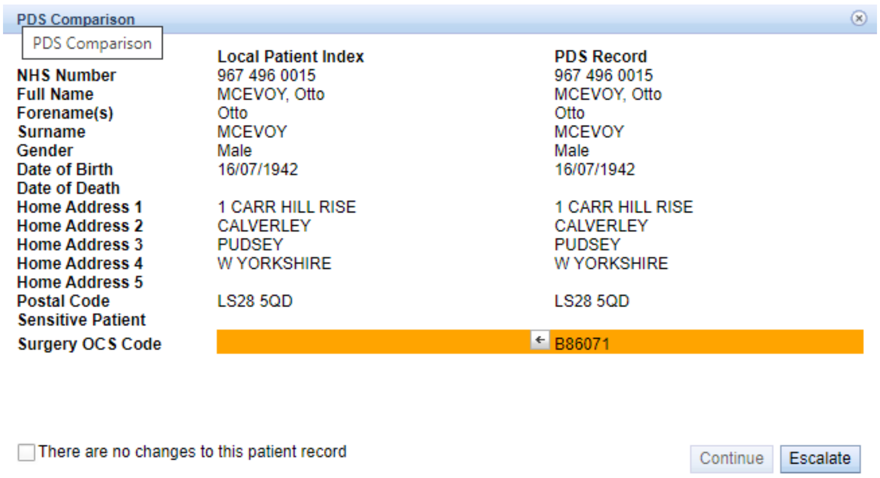
## Sync with PDS

**Cleo Action;**

Double click into the case> Select **Admin** from the top toolbar> select **Sync with PDS**> Follow the steps to match the record.


The fields that do not match will be highlighted in Orange.

Select the arrow next to the PDS record to copy them across to the LPI Record (Local Patient Index)



PDS Comparison

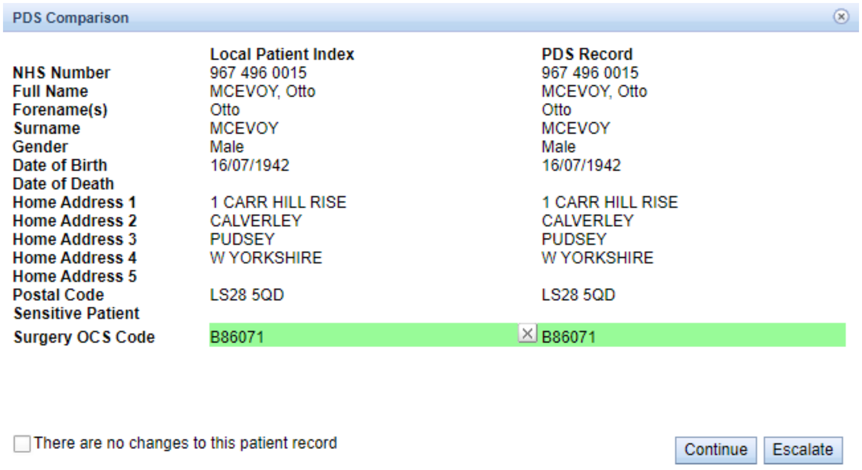
PDS Comparison

| | Local Patient Index | PDS Record |
|---|---|---|
| NHS Number | 967 496 0015 | 967 496 0015 |
| Full Name | MCEVOY, Otto | MCEVOY, Otto |
| Forename(s) | Otto | Otto |
| Surname | MCEVOY | MCEVOY |
| Gender | Male | Male |
| Date of Birth | 16/07/1942 | 16/07/1942 |
| Date of Death | | |
| Home Address 1 | 1 CARR HILL RISE | 1 CARR HILL RISE |
| Home Address 2 | CALVERLEY | CALVERLEY |
| Home Address 3 | PUDSEY | PUDSEY |
| Home Address 4 | W YORKSHIRE | W YORKSHIRE |
| Home Address 5 | | |
| Postal Code | LS28 5QD | LS28 5QD |
| Sensitive Patient | | |
| Surgery OCS Code | | B86071 |

☐ There are no changes to this patient record

Continue Escalate

Once the records match, the fields will be highlighted in green



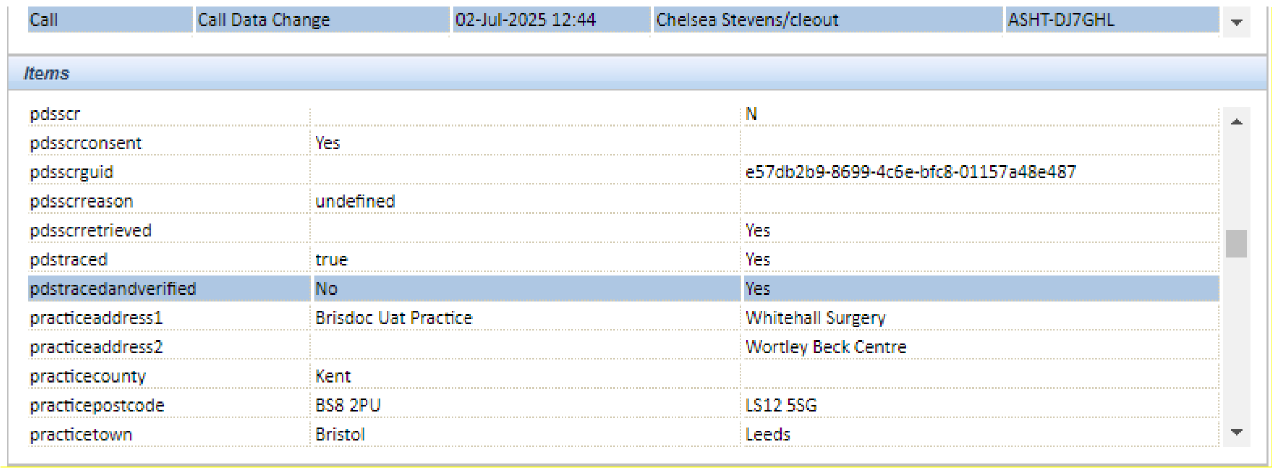

Click **Continue** > **Save & Close** case

**Cleo Audit;**

You can see if a case has been Synchronised by double clicking into the case. If the case was successfully Synchronised, it will have the following icon in the header.


However, this will not tell you who carried out the action or at what time.

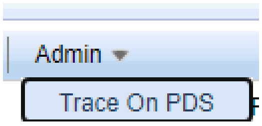
To see the user, date and time this was carried out you will need to look in the Audit. This can be found under the **pdstracednadverified** item. There are three possible outcomes in the *New Value*; Yes, No, No_Match. No match means an attempt was made to PDS trace, but a match was not found.



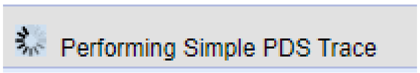
## Trace on PDS

**Cleo Action;**

Double Click into the case> **Admin** from the top toolbar> select **Trace on PDS**>

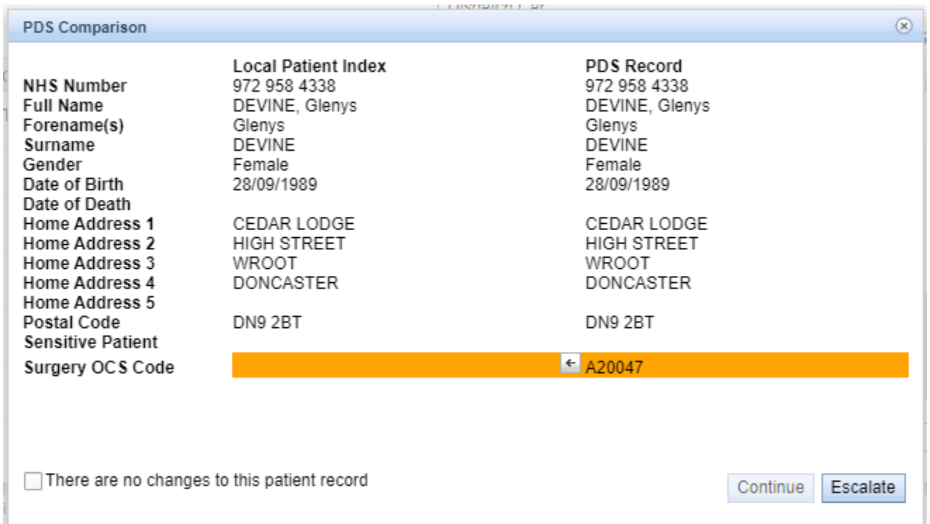



In the grey panel in the bottom left-hand corner of the window, it will tell you that Cleo is performing a PDS Trace




Once the search has completed it will tell you if there are any results, if there are it will appear as below;


Select the Blue text and this will allow you to follow the PDS matching process as below;




Select the arrow next to the PDS record to pull it through to the LPI record, these lines will turn green once they have been matched. Click **Continue** & select the patient record.

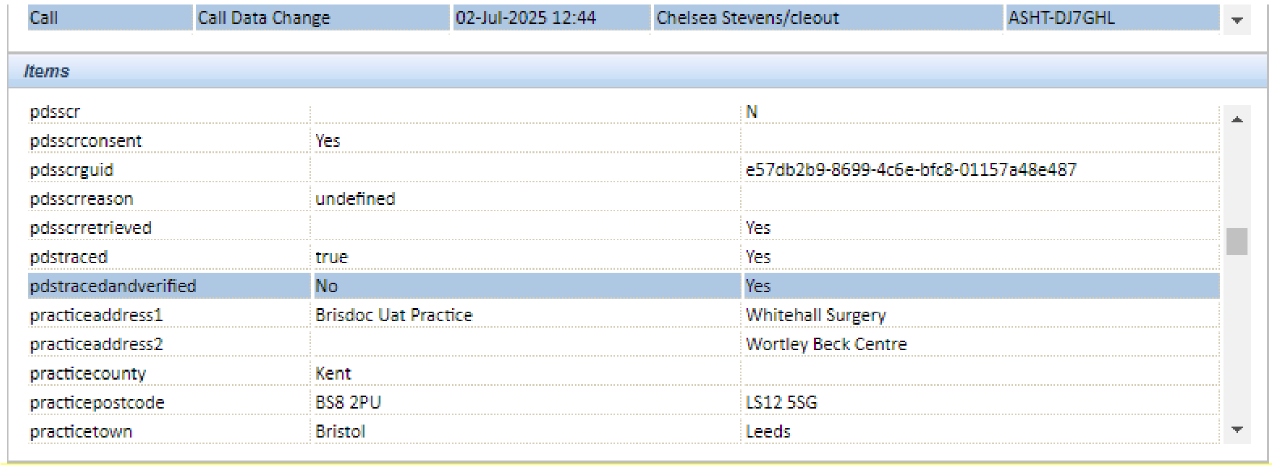
**Cleo Audit;**

You can see if a case has been Traced and Verified by double clicking into the case. If the case was successfully verified it will have the following icon on the header


However, this will not tell you who carried out the action or at what time.

To see the user, date and time this was carried out you will need to look in the Audit. This can be found under the **pdstracednadverified** item. There are three possible outcomes in the *New*

*Value* – Yes, No, No_Match. No match means an attempt was made to PDS trace, but a match was not found.



| Call | Call Data Change | 02-Jul-2025 12:44 | Chelsea Stevens/cleout | ASHT-DJ7GHL |
|---|---|---|---|---|

Items

| | | |
|---|---|---|
| pdsscr | | N |
| pdsscrconsent | Yes | |
| pdsscrguid | | e57db2b9-8699-4c6e-bfc8-01157a48e487 |
| pdsscrreason | undefined | |
| pdsscrretrieved | | Yes |
| pdstraced | true | Yes |
| pdstracedandverified | No | Yes |
| practiceaddress1 | Brisdoc Uat Practice | Whitehall Surgery |
| practiceaddress2 | | Wortley Beck Centre |
| practicecounty | Kent | |
| practicepostcode | BS8 2PU | LS12 5SG |
| practicetown | Bristol | Leeds |

## Add Non-Cinical Note

**Cleo Action;**

Double click into the case> Scroll to the bottom of the page> Select **Edit** next to Comments (NON CLINICAL)

*Comments (NON CLINICAL)* Edit

Enter your Non-Clinical comments> **Save** comments


**Cleo Audit;**

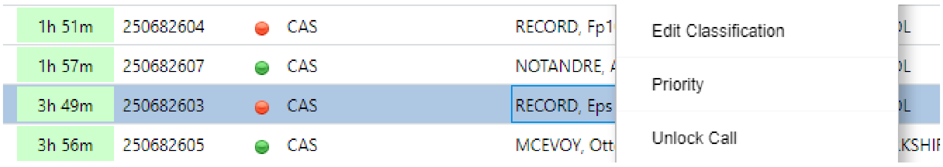
The action of adding a non-clinical note will be recorded under the *New Value* for **callcomments**, this will tell you the Cleo user, date, time and the comments added.

| Field ▲ | Old Value | New Value |
|---|---|---|
| audit_nhsjobrolecode | ~ | |
| audit_nhsorg | ~ | |
| audit_nhsuid | ~ | |
| audit_sessionroleuid | ~ | |
| call_hcp | 0 | |
| callclassassign | GP | |
| callcomments | | [Chelsea Stevens 24-Jun-2025 14:43][BR]Non clinical note test |

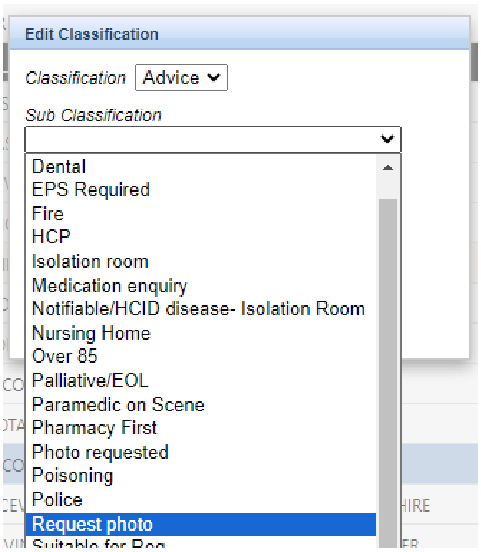
## Change Sub-Classification

**Cleo Action;**

Right click on the case> Select **Edit Classification**>




Choose the appropriate sub-classification from the dropdown menu> Click **OK**




When you return to the CAS queue, the Sub Classification will now be set to the selection made from the dropdown.


**Cleo Audit;**

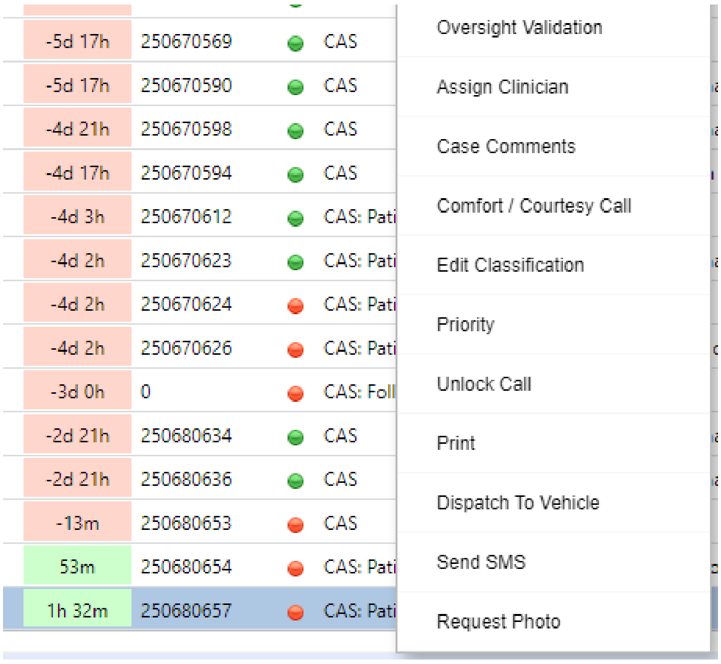
The action of manually changing the subclassification will be recorded under the *New Value* for the **callsubclassificationmanual** field as below;

| Field ▲ | Old Value | New Value |
|---|---|---|
| callsubclassificationmanual | | Request photo |

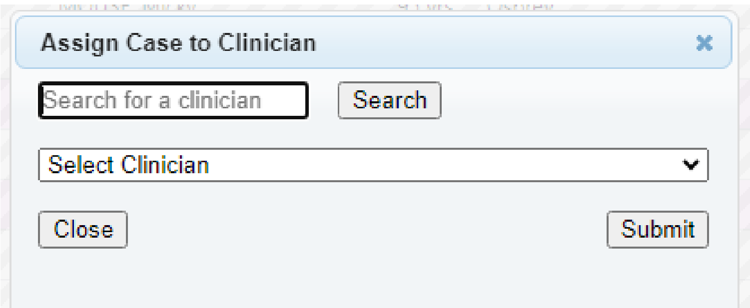
## Assign a case to a Clinician

**Cleo Action;**

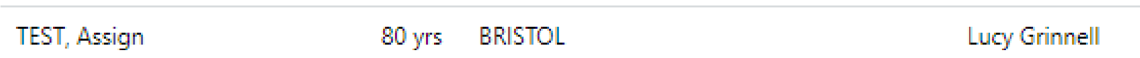
Right click on the case & select **Assign Clinician**




Type the surname of the Clinician you would like to Assign the case to > click **Search**> Select the clinician from the drop-down menu > **Submit**




The Clinicians name will appear on the case in the CAS queue

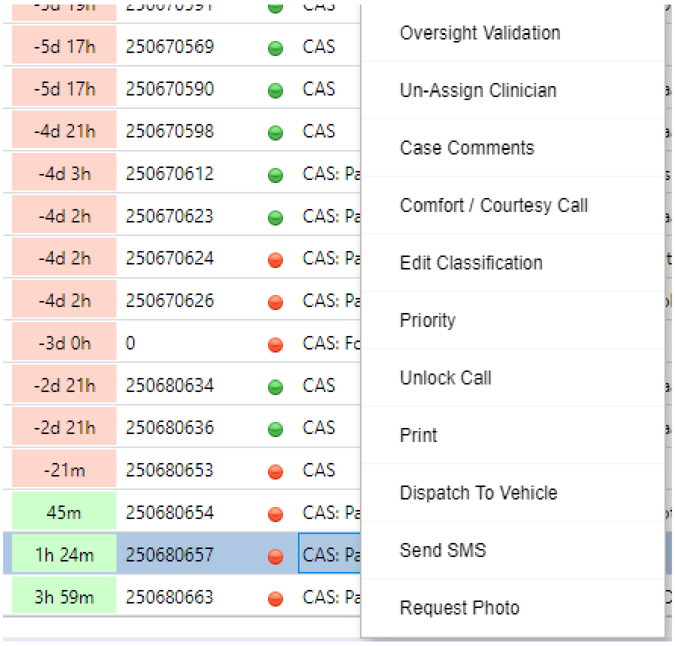



**Cleo Audit;**
The action of Assigning a case will be recorded under the *New Value* section for **gpassignedname**

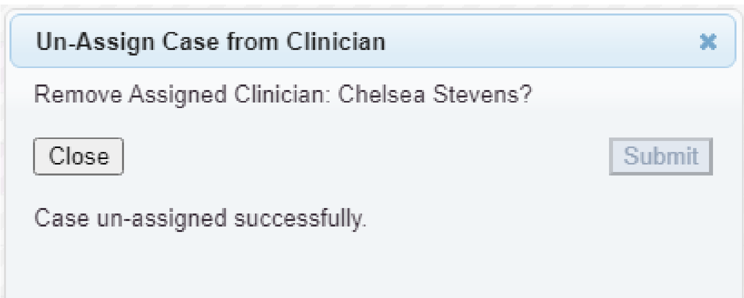

## Un-Assign a case

**Cleo Action;**

In the CAS queue > right click & select **Un-Assign Clinician**




Select **Submit** & then **Close**



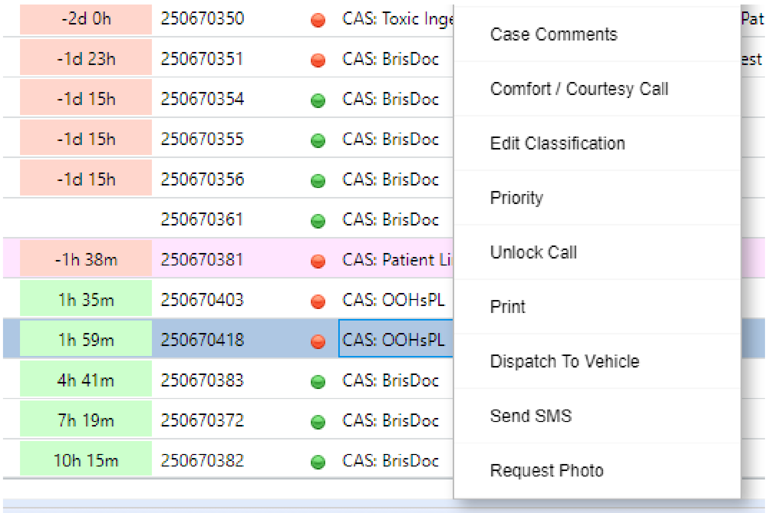

The clinicians name will be removed from the case in the CAS queue

**Cleo Audit;**
The action of Un-assigning a case will be recorded under the **gpassignedname** item. The *Old Value* will show the details of the previously assigned clinicians name, and the *New Value* will show the details of the new clinicians name.

## Add Case Comments

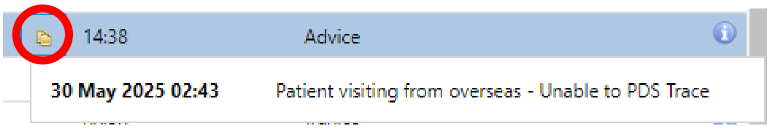
**Cleo Audit;**

Right click on the case > select **Priority**




Add in the comment and select **Confirm**


You will be returned to the CAS queue and the Sticky Note Icon will appear on the case, if you hover over this, you will be able to view the case comment and the date & time this was added




**Cleo Audit;**

The action of adding case comments will be recorded under **call_casecomments**. This will also include the time this was carried out, the comment added & the user who carried out the action.

Audit History

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 30-May-2025 14:43 | Chelsea Stevens/cleout | 1748609009000 |
| Call | Multiple Audits | 30-May-2025 14:41 | Chelsea Stevens/cleout | ASHT-DH6HZL |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| call_casecomments | | 2025-05-30T14:43:29 01:00~:~Patient visiting from overseas - Unable to PDS Trace |

## Book F2F Appointment

**Cleo Action;**

Right click on the case and select **Book appointment**> Choose the location, and time> a green message will display, confirming the appointment has been booked successfully> Close this window and check your patient is in the correct location and time slot.

**Cleo Audit;**

The action of booking an appointment will be recorded in the Audit session that contains the '**Appt External**' wording as highlighted below. In the items section you will be able to see Location (**dutybase**), Appointment time (**timeappointmenttstart**), and the Appointment date (**dateappointmenttstart**).

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Call | Call Data Change | 24-Jun-2025 12:44 | Code Signer/sehnp | 1750761875000 |
| Call | Call Data Change | 24-Jun-2025 12:44 | Appt External/sehnp | 1750761860000 |
| Calls | Read Call | 24-Jun-2025 12:43 | Lucy Grinnell/cleouat | 1750761787000 |
| Calls | New Call | 24-Jun-2025 12:33 | Chelsea Stevens/cleout | 1750761188000 |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| all_view_include | OVERSIGHT_FOLLOW_UP | |
| appointmentbookingguid | ~ | 0197a1c0-d796-7aa5-a94e-d7bc1df59314 |
| dateappointmentstart | | 20250624T16:00:00+0100 |
| dateappointmentstartiso | ~ | 2025-06-24 |
| dutybase | | Greenway |
| dutybaseid | ~ | 138 |
| timeappointmentstart | | 20250624T16:00:00+0100 |
| timeappointmentstartiso | ~ | 2025-06-24T15:00:00Z |

The user who booked the appointment will be recorded in the audit, appearing just before the **Appt External** audit entry. In this section, you'll see **appointmentsystem_launch**, and the *New Value* will display the user who performed the action.

**Note:** Users may open the appointment booking system and then close it without booking an appointment, if they need more information before proceeding for example. Launching the system doesn't always mean an appointment was booked. The user who successfully made the booking will be listed in the **appointmentsystem_launch** entry that appears directly before the *Appt External* audit.

| Audit Sessions | | | | |
|---|---|---|---|---|
| The system is awaiting all audits to be transferred. You may not be seeing all audits available | | | | |
| Calls | READ CALL | 16-Jul-2025 13:06 | Chelsea Stevens/sehnp | 1752663965000 |
| Call | Call Data Change | 16-Jul-2025 12:58 | Appt External/sehnp | 1752663499000 |
| Call | Call Data Change | 16-Jul-2025 12:57 | Chelsea Stevens/sehnp | 1752663469000 |
| Call | Call Data Change | 16-Jul-2025 12:57 | Code Signer/sehnp | 1752663465000 |

Items

| Field | Old Value | New Value |
|---|---|---|
| appointmentsystem_launch | ~ | CN\Chelsea Stevens/O\sehnp |

## Book Home Visit

**Cleo Action;**

To arrange a home visit, you need to right click and select **Despatch to vehicle**> Choose the appropriate vehicle from the list> navigate to the Home Visit queue> assign the case to the Clinician in the chosen vehicle (the Clinician will not be able to start their consultation if this is not assigned to them)

**Cleo Audit;**

The action of arranging a home visit will be recorded in the Audit session that contains the **Dispatch to car** wording as highlighted below. In the items section you will be able to see which car it has been assigned to, under the **callassignedvehicle** item.

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Calls | Read Call | 24-Jun-2025 12:49 | Lucy Grinnell/cleouat | 1750762167000 |
| Calls | Dispatch To Car | 24-Jun-2025 12:46 | Lucy Grinnell/cleouat | ASHT-DHXEAZ |
| Call | Call Data Change | 24-Jun-2025 11:28 | Code Signer/sehnp | 1750757305000 |

Items

| Field | Old Value | New Value |
|---|---|---|
| all_view_include | OVERSIGHT_FOLLOW_UP | |
| callassignedvehicle | | Christchurch Car |
| callwithvehicle | | Yes |
| casqueuekeys_visit | ALL | ALL |
| consult_session_id | 20250624111925580 | |
| dispatch_vehicle | | Christchurch Car |

## Pass case back to triaging Clinician

**Cleo Action;**

In the Oversights queue> right click and select **Move**> choose CAS as the Service, and select the appropriate sub service. This will generate a new case number for the case as it is moving Service.

**Cleo Audit;**

When a case is sent back to the CAS queue for further clinical input by the triaging clinician, this action will be recorded in the audit under **cpl_outcome**. It will show an *Old Value* of 'Severnside Face-to-Face' and a *New Value* of 'Cancelled (Case moved to alternative service)'.

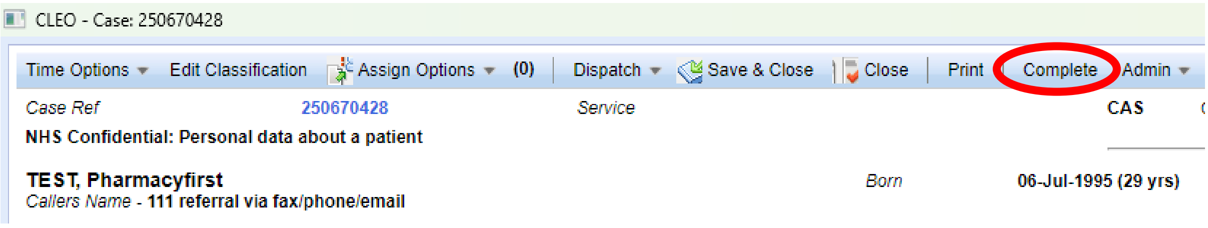
*Items*

| Field ▲ | Old Value | New Value |
|---|---|---|
| callstatusvalue | 1 | 2 |
| cpl_outcome | Severnside Face-to-Face | Cancelled (Case moved to alternative service) |
| tar_cleo_call_ref | ~ | 250683009 |
| utc_vw_key | ~ | ~ |
| utc_vw_sort | ~2025-06-30T22:44:00+01:00 | 9~20501231235959 |

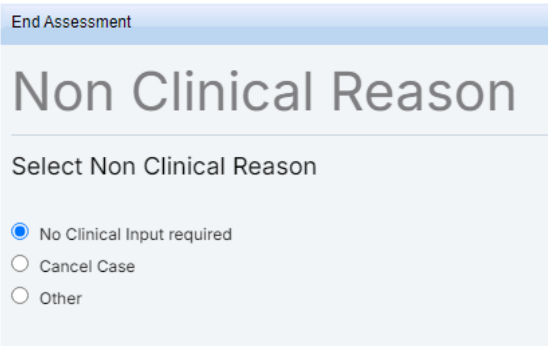
## Complete Case (No Clinical Input)

**Cleo Action;**

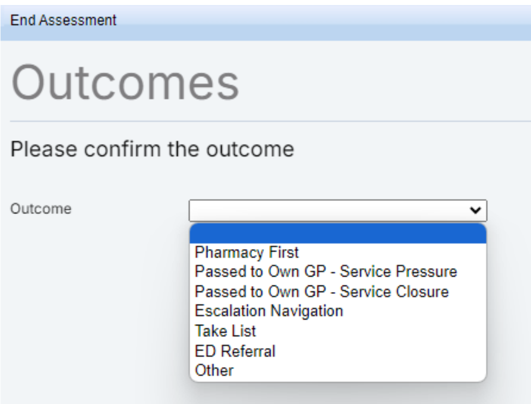
To complete a case where no further clinical input is required (Pharmacy First, Take List, Children's ED etc), Double click into the case> select **Complete** on the top toolbar




Follow the steps on screen> Select **No Clinical Input required**>




Select the appropriate option from the below list



**Cleo Audit;**

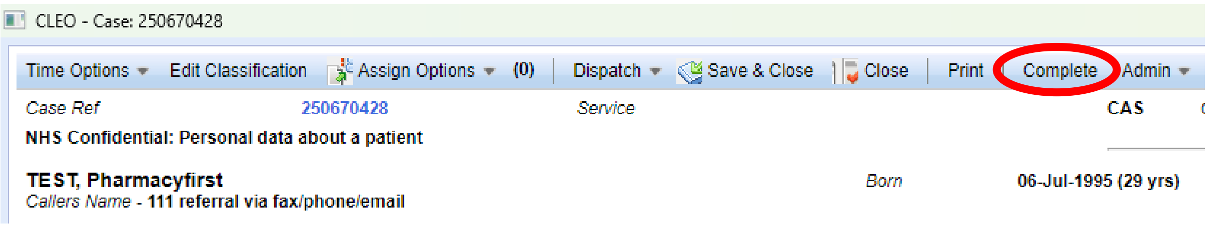
When a case is completed operationally, this action will appear in the **callstatus** field under the *New Value*. The **callinformationaloutcomes** section below will detail the reason selected when completing the case. In the example provided, *Pharmacy First* was chosen as the completion reason, but this section could display any of the available options.

| Field ▲ | Old Value | New Value |
|---|---|---|
| callcompleted | | 20250612T14:51:10+0100 |
| callinformationaloutcomes | | Pharmacy First |
| callstatus | New | Completed |
| callstatusvalue | 1 | 2 |
| callsubclassification | Pharmacy First | |
| callsubclassificationmanual | Pharmacy First | |

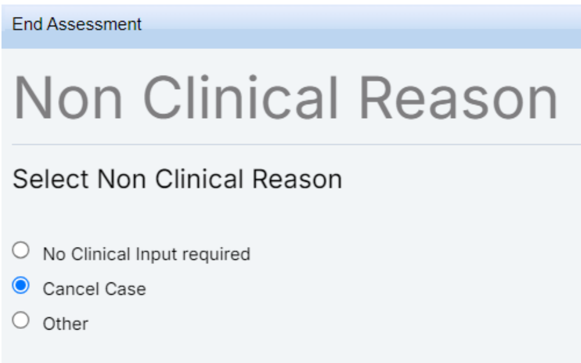
## Complete Case (Cancel Case)

**Cleo Action;**

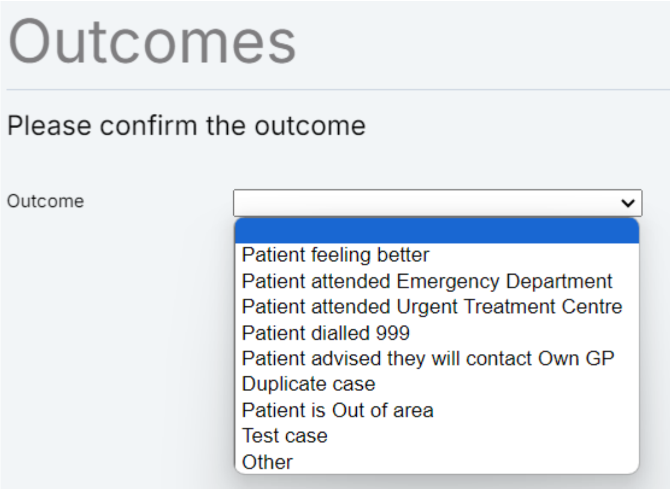
To cancel a case, for example if the Patient is feeling better, the patient is out of our area, it is a duplicate case etc, Double click into the case> select **Complete** on the top toolbar




Follow the steps on screen> Select **Cancel Case**>

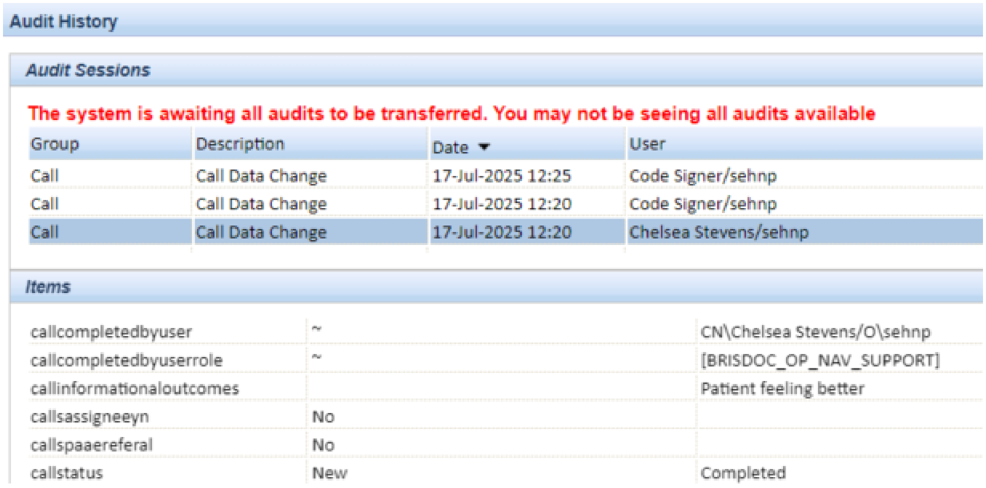


Select the appropriate option from the below list




**Cleo Audit;**

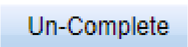
When a case is completed operationally, this will be reflected in the **callstatus** field under the *New Value*. The **callinformationaloutcomes** section shows the reason chosen for completing the case. In the example below, *Patient Feeling Better* was selected, but this section could display any option from the dropdown list above.




## Un-Complete a case

**Cleo Action;**

Once you have found the case you would like to Un-complete, double click into the case> select **Un-Complete** on the top toolbar




The case will now be live in the queue in which it was completed within, i.e. If this was a Face to Face appointment at the point of closing, it will re-open within the F2F queue.

**Cleo Audit;**

The action of un-completing a case will be recorded under the *Uncomplete* audit, as recorded below. In this audit, the *New Value* for the **callstatus** field will be ‘New’.


Audits

| Group | Description | Date |
|---|---|---|
| Calls | Uncomplete | 11-Jun-2025 14:26 |
| Calls | Patient History | 11-Jun-2025 14:26 |

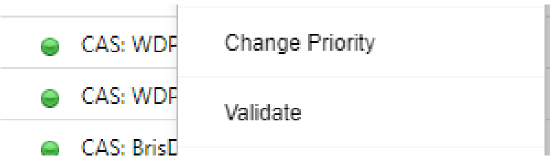
Items

| Field | Old Value | New Value |
|---|---|---|
| callcompleted | 20250610T12:24:00+0100 | |
| calldtsagentyn | NA | Yes |
| callinformationaloutcomes | Severnside Follow Up | |
| callreadcodes | XaBVJ - Clinical findings | |
| callstatus | Completed | New |

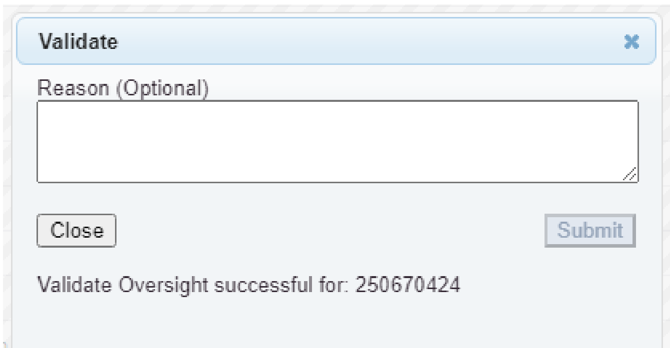
## Clinical Navigator Validate

**Cleo Action;**

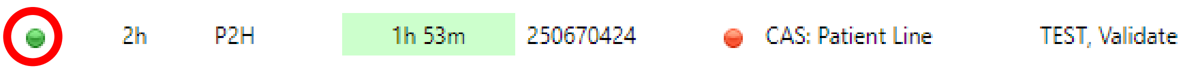
Select a case that has not been validated (this will be indicated by the red dot Icon, on the far left of the CAS queue)> Right click on the case > select **Validate**




Click **Submit** & then **Close** to exit out of the window.




When you return to the CAS queue, the red dot Icon on the left of the case, will now be Green;




**Cleo Audit;**

The action of validating will be recorded under the **casvalidationcount** item.
The same Audit Session will detail the date, time and user who carried out the action.

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 30-May-2025 15:09 | Chelsea Stevens/cleout | 1748610568000 |
| Call | Multiple Audits | 30-May-2025 15:02 | Chelsea Stevens/cleout | ASHT-DH6JGU |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| casvalidationcount | ~ | 1 |
| casvalidationreason | ~ | |
| casvalidationtime | ~ | 20250530T15:09:28+0100 |
| casvalidationuser | ~ | CN\Chelsea Stevens/O\cleout |

On a busy day, this can be carried out more than once, the Audit will record this has happened, as with the *New Value* below. If a Clinician has entered a reason, this will show in the **casvalidationreason** section;

**Audit History**

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Calls | Read Call | 30-May-2025 15:21 | Chelsea Stevens/cleout | 1748611313000 |
| Call | Call Data Change | 30-May-2025 15:21 | Chelsea Stevens/cleout | 1748611272000 |
| Call | Call Data Change | 30-May-2025 15:20 | Code Signer/sehnp | 1748611243000 |
| System | Audit Read | 30-May-2025 15:19 | Chelsea Stevens/cleout | 1748611199000 |

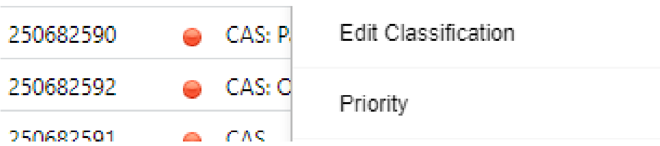
*Items*

| Field | Old Value | New Value |
|---|---|---|
| casvalidationcount | 1 | 2 |
| casvalidationreason | | 2nd Validation - High Volume |
| casvalidationtime | 20250530T15:09:28+0100 | 20250530T15:21:12+0100 |

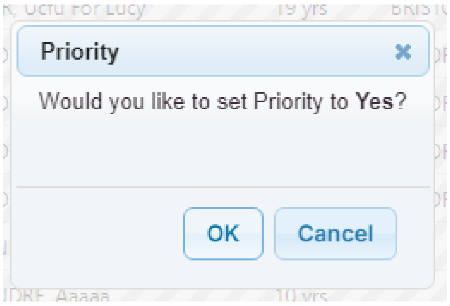
## Pinking (Priority Tag)

**Cleo Action;**

Right click on the case > select **Priority**




Select **Yes**




The case will then turn Pink on the CAS queue, highlighting that this case is high priority.

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| ● | 2h | P2H | 1h 50m | 250670380 | ● CAS: OOHsPL | FAILEDCONTACT, Clinical | 25 yrs | BRISTOL |
| ● | 2h | P2H | 1h 55m | 250670381 | ● CAS: Patient Line | TEST, Pinking | 34 yrs | BRISTOL |
| ● | 12h | DX1116 | 10h 53m | 250670372 | ● CAS: BrisDoc | WEBBER, Horton | 102 yrs | LOWESTOFT |

**Cleo Audit;**

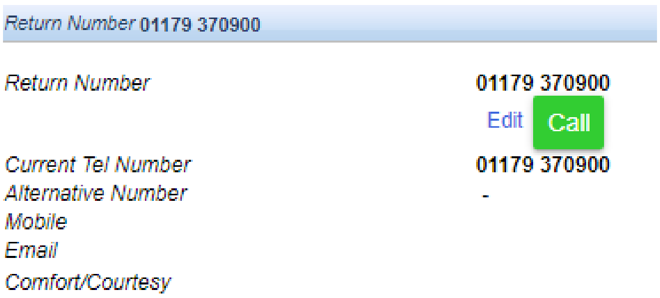
The action of pinking will be recorded within the **clinihighpriority** item. This will have a *New Value* of 1. The same Audit Session will show you the time this was carried out & the user who carried out the action.

| Field ▲ | Old Value | New Value |
|---|---|---|
| clinihighpriority | ~ | 1 |
| clinihighpriority_comments | ~ | |
| clinihighpriority_time | ~ | 20250530T11:06:59+0100 |
| clinihighpriority_user | ~ | CN\Chelsea Stevens/O\cleout |

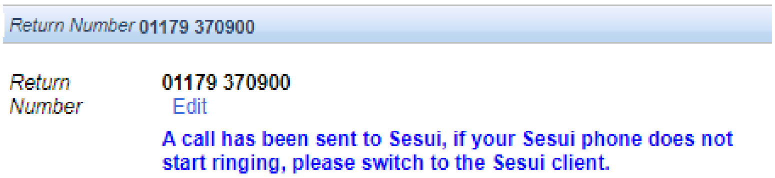
## Sesui Click to Dial

**Cleo Action;**

Double click into the case> Click on the green **Call** button next to the return number> this will start to call the patient / HCP.




Cleo will indicate that your call has been sent to Sesui, and to navigate to the application if you have any issues or need to end the call.

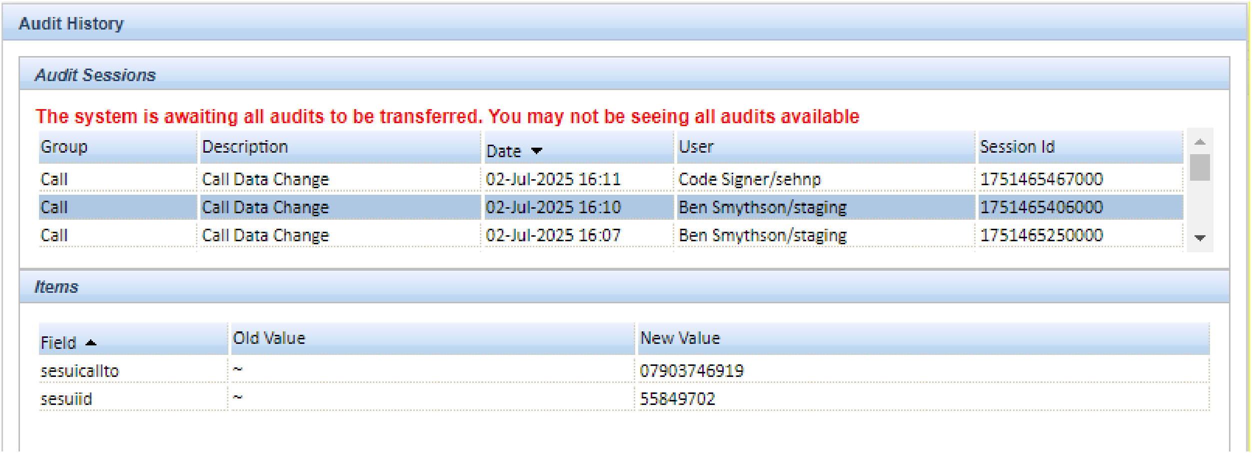



**Cleo Audit;**

The action of using Sesui Click to Dial will be recorded as below;

Sesuicallto – This will be the number called

Sesuiid – This will be the unique Sesui ID used to make the call



Audit History

Audit Sessions

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 02-Jul-2025 16:11 | Code Signer/sehnp | 1751465467000 |
| Call | Call Data Change | 02-Jul-2025 16:10 | Ben Smythson/staging | 1751465406000 |
| Call | Call Data Change | 02-Jul-2025 16:07 | Ben Smythson/staging | 1751465250000 |

Items

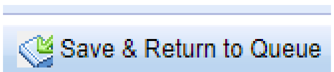
| Field | Old Value | New Value |
|---|---|---|
| sesuicallto | ~ | 07903746919 |
| sesuiid | ~ | 55849702 |

## Clinical Failed Contact

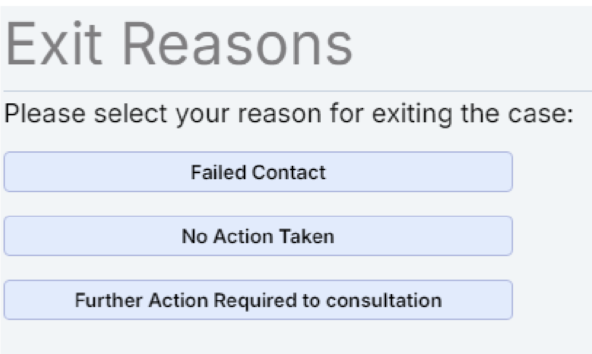
Within Cleo a 'Failed Contact' can only be registered by a Clinician.

**Cleo Action;**

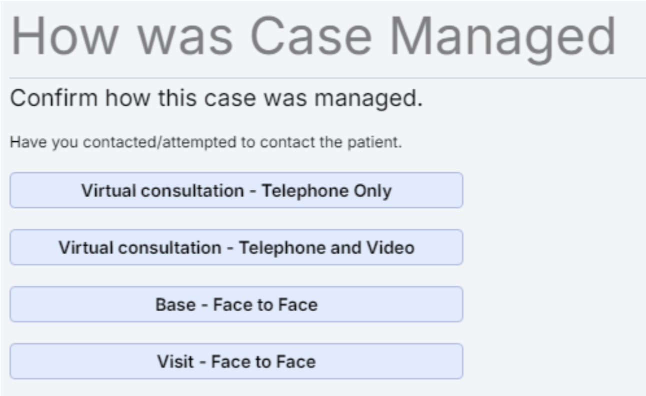
Detail the failed contact within your Consultation> Click **Save & Return to Queue**>




Choose **Failed Contact**>




Choose your failed contact method> Select **next**




Choose your Failed contact reason> select **next**


Select **Save and return to Queue**> There will now a first failed contact icon on the case

**Cleo Audit;**

A failed contact will be recorded under the **Finish Consultation** Audit. Here you are specifically looking for the **cpl_exitreason** & **cpl_failedcontactreason** items as per the below image;

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Calls | Read Call | 23-Jun-2025 16:33 | Chelsea Stevens/cleout | 1750689212000 |
| Call | Call Data Change | 23-Jun-2025 15:17 | Code Signer/sehnp | 1750684676000 |
| Call | Multiple Audits | 23-Jun-2025 15:17 | Chelsea Stevens/cleout | ASHT-DHWJJZ |
| Call | Call Data Change | 23-Jun-2025 15:06 | Chelsea Stevens/cleout | 1750684016000 |
| Patient | Set First Contact Time | 23-Jun-2025 15:06 | Chelsea Stevens/cleout | 1750684014000 |

*Audits*

| Group | Description | Date |
|---|---|---|
| Call | Call Data Change | 23-Jun-2025 15:17 |
| Consultation | Finish Consultation | 23-Jun-2025 15:17 |

*Items*

| | | |
|---|---|---|
| consult_session_id | ~ | 20250623150626426 |
| cpl_action | ~ | SAVE_AND_RETURN_TO_QUEUE |
| cpl_auditquestions | ~ | |
| cpl_contactmade | ~ | |
| cpl_exitreason | ~ | FAILED_CONTACT |
| cpl_failedcontactreason | ~ | Answerphone - Message left |
| cpl_failedcontactwarning | ~ | SAVE_AND_RETURN_TO_QUEUE |
| cpl_furtheractiongp | ~ | |
| cpl_furtheractiongptext | ~ | |
| cpl_insufficientcontactattempts | ~ | |
| cpl_managedhow | ~ | 1-VirtualConsultTelOnly |

## Save & Return to Queue

**Cleo Action;**

In addition to the Failed Contact option, Save and Return to Queue has the following options;

- **No Action Taken**
- **Further Action Required to Consultation**

**Cleo Audit;**

If either of these options are selected, this will be recorded within **Finish Consultation** audit as per the Failed contact section of this document (**cpl_exitreason**).

No Action taken will be recorded as below;

| | | |
|---|---|---|
| cpl_action | ~ | SAVE_AND_RETURN_TO_QUEUE |
| cpl_auditquestions | ~ | |
| cpl_contactmade | ~ | |
| cpl_exitreason | ~ | NO_ACTION_TAKEN |

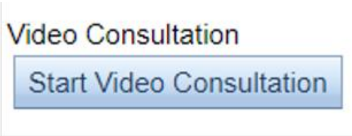
Further Action required to consultation will be recorded as below;

| | | |
|---|---|---|
| cpl_action | ~ | FURTHER_ACTION_REQUIRED |
| cpl_auditquestions | ~ | |
| cpl_contactmade | ~ | |
| cpl_exitreason | ~ | FURTHER_ACTION_REQUIRED |

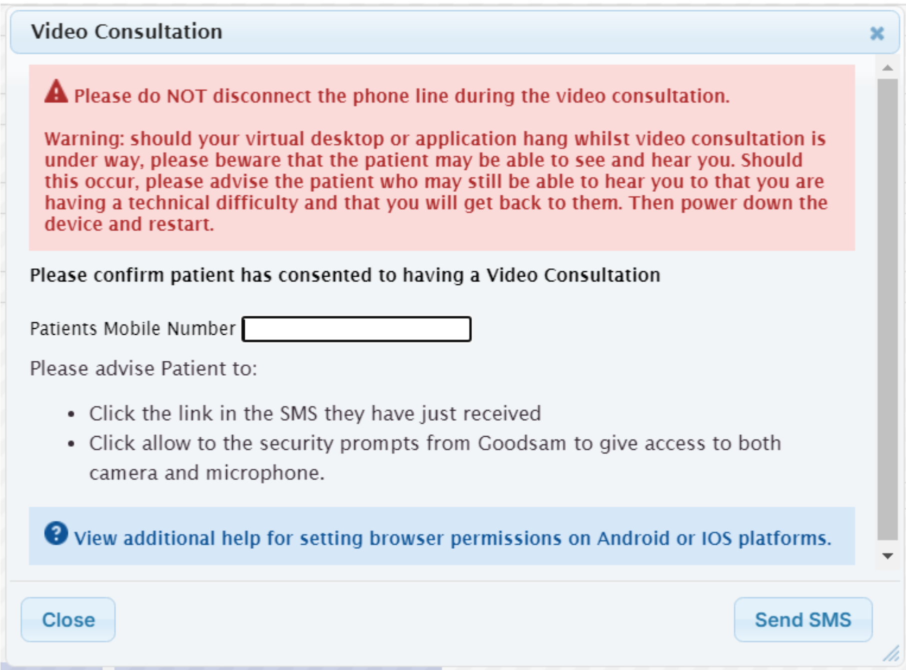
## GoodSam Video Consultation

**Cleo Action**

Start Consultation> Navigate to the Video Consultation field> click the **Start Video Consultation** button




The mobile may be auto populated in the field, if not enter this manually> Click **Send SMS**>




The video will load on the computer and once the patient has actioned their end, you will be able to carry out the video consultation. Once completed exit out of & finish the video consultation.

**Cleo Audit;**

The date and time of a video consultation will be recorded under the **vc_start** field


## PaCCs

**Cleo Action;**

Double click into the case & navigate to the PaCCs module> follow the PaCCs process> follow the End Assessment process.

**Cleo Audit;**

The Action of completing PaCCs will be in the audit, under the **paccsstarted** item.

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 02-Jul-2025 15:24 | Code Signer/sehnp | 1751462671000 |
| Calls | Multiple Audits | 02-Jul-2025 15:24 | Ben Smythson/staging | ASHT-DJ7PD8 |
| Call | Call Data Change | 02-Jul-2025 15:24 | Ben Smythson/staging | 1751462647000 |

*Audits*

| Group | Description | Date |
|---|---|---|
| Calls | Call Complete | 02-Jul-2025 15:24 |
| Consultation | Finish Consultation | 02-Jul-2025 15:24 |
| Call | Call Data Change | 02-Jul-2025 15:24 |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| action_time | | 20250702T15:24:13+0100 |
| browser | ~ | NETSCAPE |
| client | ~ | WEB |
| fullpath | ~ | HTTPS://ASH-BRISDOC-CLEOUAT.SEHNP.NHS.UK/STAGE/CLEO.NSF |
| http_user_agent | ~ | MOZILLA/5.0 (WINDOWS NT 10.0; WIN64; X64) APPLEWEBKIT/537.36 (KHTML, LIKE GECKO) CHROME/120.0.0.0 SAFARI/537.36 |
| jobrole | ~ | [BRISDOC_CLINI_NAV_SUPPORT] |
| paccsstarted | ~ | PACCS NOT COMPLETE |
| remote_addr | ~ | 192.168.132.215 |
| servername | ~ | ASH-BRISDOC-CLEOUAT.SEHNP.NHS.UK |
| username | ~ | CN\BEN SMYTHSON/O\STAGING |

## Consultation Notes

**Cleo Action;**

Double click into the case & navigate to the consultation fields> enter the consultation details> once the case has been saved & returned to queue or actioned via End Assessment, these notes will be saved against the case.

**Cleo Audit;**

The quickest place to view the Consultation notes is by double clicking into the case and navigating to the bottom of the page to expand the consultation panel;

24-Jun-2025 10:22 - Chelsea Stevens [GP] | Advice (Not Urgent) | Smart Card: YES

**History**
Patient details confirmed: YES.
Spoken to: Patient
Patient presenting with: Example text for presenting complaint
Example text for Past medical history, Allergies and Medications
Red Flags: Example text for Red Flags [Document any area of the history or symptoms that helped diagnose the patients condition].

**Examination**

**Diagnosis**
Example text for Diagnosis / Assessment

**Treatment**
Example text for Management Plan
Safety netting: Example text for Safety netting

**Prescribing**

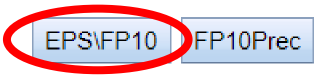
You can also see this information in the audit, under the **Finish Consultation** section, however this information is not bunched together as it is with the consultation panel above.

## EPS

**Cleo Action;**

Double click into the case & navigate to the EPS/FP10 button & follow the EPS process;

*Prescriptions Details*




**Cleo Audit;**

The quickest place to view an EPS which has been recorded, is within the Consultation panel, once double clicked into the case. Any medications issued via EPS will be prefixed with 'EPS'.

30-Jun-2025 14:46 - Chelsea Stevens [GP] | Advice (Not Urgent) | Smart Card: YES

**History**

Patient presenting with: test

**Examination**

**Diagnosis**

**Treatment**

**Prescribing**
Script ID : 028747-Y03662-EAA91K

EPS - Amoxicillin 500mg capsules (qty : 15)
Used as directed

EPS - Morphine sulfate 10mg/1ml solution for injection ampoules (qty : 5)
Used as directed

You can also see this information in the audit, under the **Finish Consultation** section, this will be recorded under **epstypes**, **epsdrugs** etc as per the below;

*Audits*

| Group | Description | Date |
|---|---|---|
| Call | Call Data Change | 30-Jun-2025 14:54 |
| Consultation | Finish Consultation | 30-Jun-2025 14:54 |

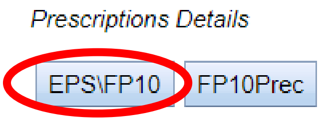
*Items*

| | | |
|---|---|---|
| cpl_vulnerabilitychild | ~ | |
| current_user_role | ~ | [BRISDOC_CAS_CLINI] |
| docid | ~ | D586B20B0D0A8E9E80258CB9004B8362 |
| epsdesc | ~ | Used as directed |
| epsdrugs | ~ | Amoxicillin 500mg capsules |
| epsguid | ~ | 469bbb70-78a8-4b2f-8c19-70182f20889a |
| epsqtys | ~ | 15 |
| epsscriptids | ~ | 028747-Y03662-EAA91K |
| epstypes | ~ | eps |

## FP10

**Cleo Action;**

Double click into the case & Navigate to the **EPS/FP10** button & follow the FP10 process;




**Cleo Audit;**

The quickest place to view an FP10 which has been recorded, is within the Consultation panel, once double clicked into the case. Any medications added to an FP10 will be prefixed with 'FP10'.

24-Jun-2025 09:53 - Chelsea Stevens [GP] | Advice (Not Urgent) | Smart Card: YES

**History**

Patient presenting with: Patient needing medication

**Examination**

**Diagnosis**

**Treatment**

**Prescribing**
Script ID : AE48C9-Y03662-EAA78N

FP10 - Paracetamol 500mg tablets (qty : 32)
Used as directed

You can also see this information in the audit, under the **Finish Consultation** section, this will be recorded under **epstypes**, **epsdrugs** etc as per the below;

| | | |
|---|---|---|
| current_user_role | ~ | [BRISDOC_CLINI_NAV_SUPPORT_NOPACCS] |
| docid | ~ | 894723305462808380258CB3002E406C |
| epsdesc | ~ | Used as directed |
| epsdrugs | ~ | Paracetamol 500mg tablets |
| epsguid | ~ | a02028f8-554c-47fa-beed-d776ddaadbcb |
| epsqtys | ~ | 32 |
| epsscriptids | ~ | AE48C9-Y03662-EAA78N |
| epstypes | ~ | fp10 |

## ShareMyCare Viewed

**Cleo Action;**

You can view a patient ShareMyCare (Special Patient Notes) record in three ways;

1. On case entry
2. By double clicking into the case and selecting **View Detail Match**

3. By navigating to the ShareMyCare in the 'Other Information' section, near the patients' demographics

**Cleo Audit;**

The action of viewing a ShareMyCare record will be detailed within **SMC View** audit section. This will tell you the date & time this was viewed. You will also be able to see who carried out the action in the Audit Session.

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Calls | Read Call | 24-Jun-2025 11:28 | Lucy Grinnell/cleouat | 1750757339000 |
| Call | Call Data Change | 24-Jun-2025 11:28 | Code Signer/sehnp | 1750757322000 |
| Calls | Read Call | 24-Jun-2025 11:28 | Lucy Grinnell/cleouat | 1750757282000 |
| Call | Multiple Audits | 24-Jun-2025 11:14 | Lucy Grinnell/cleouat | ASHT-DHXDZZ |

*Audits*

| Group | Description | Date |
|---|---|---|
| Call | Call Data Change | 24-Jun-2025 11:14 |
| Calls | SMC View | 24-Jun-2025 11:13 |
| Call | Call Data Change | 24-Jun-2025 11:13 |

## Summary Care Record Viewed

**Cleo Action;**

Double click into the case> **Start Consultation**> navigate to the Summary Care Record panel and view

**Cleo Audit;**

This action will be recorded in various places within the case, the quickest place to view this is under the **Add New Symptom** header within the Protocols panel;

*Symptoms:*

Add New Symptom *(Double click on row to edit exiting symptoms)*

| User Name | Date/Time | Symptoms |
|---|---|---|
| Chelsea Stevens | 02-Jul-2025 10:13 | SCR was viewed for this call. |

This will tell you the User who viewed the SCR and the date & time.
This action can also be viewed within the Audit.

## GP Connect HTML Viewed

**Cleo Action;**

Double click into the case> **Start Consultation**> navigate to the **GP Connect HTML** panel and view

**Cleo Audit;**

This action will be recorded in the Audits section as below;

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| System | Audit Read | 24-Jun-2025 17:41 | Chelsea Stevens/cleout | 1750779672000 |
| Calls | Read Call | 24-Jun-2025 17:41 | Chelsea Stevens/cleout | 1750779661000 |
| Call | Call Data Change | 24-Jun-2025 16:54 | Code Signer/sehnp | 1750776896000 |
| Calls | Multiple Audits | 24-Jun-2025 16:44 | Chelsea Stevens/cleout | ASHT-DHXNS6 |
| Call | Call Data Change | 24-Jun-2025 16:44 | Chelsea Stevens/cleout | [illegible] |

**Audits**

| Group | Description | Date |
|---|---|---|
| Call | Call Data Change | 24-Jun-2025 16:54 |
| Consultation | Finish Consultation | 24-Jun-2025 16:54 |
| Calls | GP Connect View | 24-Jun-2025 16:44 |

## CPIS Viewed

**Cleo Action;**

Double click into the case> **Start Consultation**> navigate to the **CIPS** Panel and view

**Cleo Audit;**

This action will be shown in the Audits section as below;

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| System | Audit Read | 24-Jun-2025 17:39 | Chelsea Stevens/cleout | 1750779558000 |
| Calls | Read Call | 24-Jun-2025 17:39 | Chelsea Stevens/cleout | 1750779546000 |
| Call | Call Data Change | 24-Jun-2025 16:55 | Code Signer/sehnp | 1750776956000 |
| Call | Multiple Audits | 24-Jun-2025 16:55 | Chelsea Stevens/cleout | ASHT-DHXP5Z |
| Call | Call Data Change | 24-Jun-2025 16:55 | Chelsea Stevens/cleout | 1750776932000 |

**Audits**

| Group | Description | Date |
|---|---|---|
| Call | Call Data Change | 24-Jun-2025 16:55 |
| Consultation | Finish Consultation | 24-Jun-2025 16:55 |
| Call | CPIS VIEW | 24-Jun-2025 16:55 |

## Pathways Viewed

**Cleo Action;**

Double click into the case> navigate to the **Pathways Reports** panel & view

**Cleo Audit;**

This action will be recorded in the Audits section as below;

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Call | Call Data Change | 24-Jun-2025 17:01 | Chelsea Stevens/cleout | 1750777311000 |
| Patient | Set First Contact Time | 24-Jun-2025 17:01 | Chelsea Stevens/cleout | 1750777309000 |
| Calls | View Pathways | 24-Jun-2025 17:01 | Chelsea Stevens/cleout | ASHT-DHXPCU |
| Calls | Read Call | 24-Jun-2025 17:01 | Chelsea Stevens/cleout | 1750777279000 |
| Call | Call Data Change | 18-Jun-2025 16:22 | Code Signer/sehnp | 1750256572000 |

## Agency Referral

**Cleo Action;**

Once a consultation has started> navigate to the **Agency** panel & select the agency you wish to refer to> select **Click to Email**. A window will display to will confirm that once the case has been completed, the Agency referral will be sent.

Agency

Click to Email

**Cleo Audit;**

If a Clinician has selected Agency Referral, this will be detailed under the **agency_referral_to item** in the Audit. The email address this was sent to, will show in the highlighted field below.

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 15-Jul-2025 11:48 | Code Signer/sehnp | 1752572915000 |
| Call | Call Data Change | 15-Jul-2025 11:48 | Chelsea Stevens/sehnp | 1752572912000 |
| Call | Call Data Change | 15-Jul-2025 11:48 | Chelsea Stevens/sehnp | 1752572910000 |

**Items**

| Field | Old Value | New Value |
|---|---|---|
| agency_referral_to | ~ | |

## Urgent Follow Up, F2F & Home Visit Request

**Cleo Action;**

Once a Clinician has carried out their consultation, they can request a Face-to-Face Appointment, Home Visit, or Further Urgent Care Follow Up if required.

*Note: When a case gets moved from one service to another it will create a new case number. The easiest way to view both of these cases, is within the Patient History panel once double clicked into a case.*

**Cleo Audit;**

To see which of the three follow up options has been requested, navigate to the following fields in the items panel of the audit;

**tar_cleo_call_base** – this will show either Base, Visit or Advice

**tar_cleo_call_ref** – this will show the case number of the new case created for the follow up consultation.

**tar_cleo_call_sub_service** – this will show either Face to Face, Home Visit or Follow Up

Please see below examples for each of these follow up audits;

**Face to Face;**

Audit History

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Call | Call Data Change | 15-Jul-2025 11:48 | Chelsea Stevens/sehnp | 1752572912000 |
| Call | Call Data Change | 15-Jul-2025 11:48 | Chelsea Stevens/sehnp | 1752572910000 |
| Call | Multiple Audits | 15-Jul-2025 11:48 | Chelsea Stevens/sehnp | NORA-DJX62L |
| Call | Call Data Change | 15-Jul-2025 11:46 | Chelsea Stevens/sehnp | 1752572794000 |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| calldtsagentyn | Yes | No |
| dailyindividual | | 1 |
| dailysummary | ~ | 1 |
| tar_cleo_call_active | ~ | 20250715T11:48:29+0100 |
| tar_cleo_call_class | ~ | Base |
| tar_cleo_call_dx_priority | ~ | P6h |
| tar_cleo_call_question | ~ | No specific PPE requirements/infectious concerns |
| tar_cleo_call_ref | ~ | 251315524 |
| tar_cleo_call_sub_class | ~ | |
| tar_cleo_call_sub_service | ~ | Face to Face |
| tar_cleo_call_type | ~ | No specific PPE requirements/infectious concerns |

**Home Visit;**

Audit History

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 15-Jul-2025 16:11 | Code Signer/sehnp | 1752588674000 |
| Call | Call Data Change | 15-Jul-2025 16:11 | Chelsea Stevens/sehnp | 1752588671000 |
| Call | Multiple Audits | 15-Jul-2025 16:11 | Chelsea Stevens/sehnp | NORA-DJXM2P |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| calldtsagentyn | Yes | No |
| dailyindividual | | 1 |
| dailysummary | ~ | 1 |
| tar_cleo_call_active | ~ | 20250715T16:11:11+0100 |
| tar_cleo_call_class | ~ | Visit |
| tar_cleo_call_dx_priority | ~ | P6h |
| tar_cleo_call_question | ~ | No specific PPE requirements/infectious concerns |
| tar_cleo_call_ref | ~ | 251316759 |
| tar_cleo_call_sub_class | ~ | |
| tar_cleo_call_sub_service | ~ | Home Visit |
| tar_cleo_call_type | ~ | No specific PPE requirements/infectious concerns |

**Follow Up;**


Audit History

Audit Sessions

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| Group | Description | Date | User | Session Id |
|---|---|---|---|---|
| Call | Call Data Change | 15-Jul-2025 16:13 | Code Signer/sehnp | 1752588821000 |
| Call | Call Data Change | 15-Jul-2025 16:13 | Chelsea Stevens/sehnp | 1752588818000 |
| Call | Multiple Audits | 15-Jul-2025 16:13 | Chelsea Stevens/sehnp | NORA-DJXM7F |

Items

| Field | Old Value | New Value |
|---|---|---|
| calldtsagentyn | Yes | No |
| dailyindividual | | 1 |
| dailysummary | ~ | 1 |
| tar_cleo_call_active | ~ | 20250715T18:00:00+0100 |
| tar_cleo_call_class | ~ | Advice |
| tar_cleo_call_dx_priority | ~ | P6h |
| tar_cleo_call_question | ~ | |
| tar_cleo_call_ref | ~ | 251316775 |
| tar_cleo_call_sub_class | ~ | Follow Up |
| tar_cleo_call_sub_service | ~ | FOLLOW_UP |
| tar_cleo_call_type | ~ | |

## End Assessment

**Cleo Action;**

Once the consultation is complete and there is no further input required, The Clinician needs to End their assessment.
Select **End Assessment** on the top toolbar> confirm you wish to end assessment> confirm whether contact was made> select **No** to Non-Clinical Support> answer the questions on Verification of death & safeguarding as appropriate> select the appropriate Outcome> answer the GP Further Action question as appropriate> select the appropriate Read Code> select Next, select Complete.

**Cleo Audit;**

The Action of ending an assessment will be detailed within the **Call Complete** and **Finish Consultation** Audits

*Audits*

| Group | Description | Date ▼ |
|---|---|---|
| Calls | Call Complete | 24-Jun-2025 10:05 |
| Consultation | Finish Consultation | 24-Jun-2025 10:05 |

*Items*

| Field ▲ | Old Value | New Value |
|---|---|---|
| call1stcontact_success | 0 | 1 |
| call_hcp | 0 | |
| callassignedvehicle | ~ | |
| callclassassign | GP | |
| callcompleted | | 20250624T10:05:23+0100 |
| callcompletedbyuser | ~ | CN\Chelsea Stevens/O\cleout |
| callcompletedbyuserrole | ~ | [BRISDOC_CLINI_NAV_SUPPORT_NOPACCS] |
| callinformationaloutcomes | | Treatment given- call back as necessary |
| callpregnant | | No |
| callreadcodes | | XaBVJ - Clinical findings |

Key sections of the audit to look for are;

- **cpl_outcome** – this will be the Outcome selected by the Clinician
- **cpl_readcodes** - this will be the Read Code selected by the Clinician
- **cpl_auditquestions** – This will be **yes** or **no** for Verification of Death & Safeguarding questions
- **cpl_nonclinicalsupporttocomplete** – this will say false if non clinical input is not required, and true if non clinical support has been requested.

## MHCN Review

**Cleo Action;**

On End Assessment the Mental Health Clinical team will have an additional question for Registered MH Clinician Sign off.

End Assessment

Non Clinical and Prescribing

| | | |
|---|---|---|
| Non-Clinical support to complete case required? | ◉ No | ○ Yes |
| Registered MH Clinician Sign off required | ○ No | ◉ Yes |

If they select **Yes**, the case will remain in the CAS queue with a new Sub-Classification of **Registered MH Sign Off**

**Cleo Audit;**

This action will be recorded within the Call Complete Audit; the Item will be detailed as **cpl_mhcliniciansignoffrequired - True**

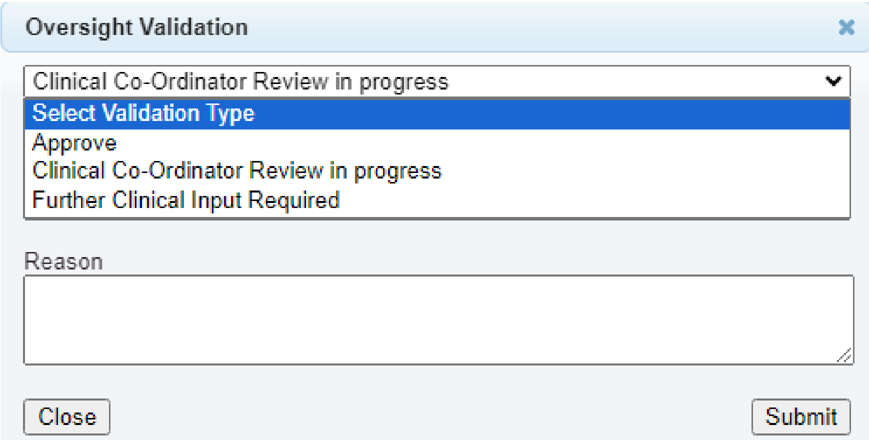
| | | |
|---|---|---|
| cpl_mhcliniciansignoffrequired | ~ | true |

## CC Approved, Further Clinical Input & Review In Progress

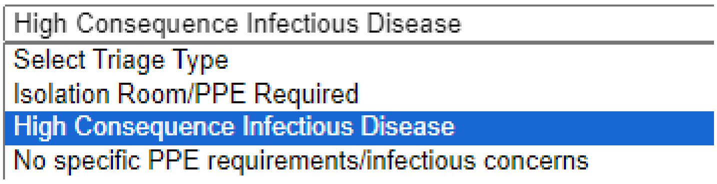
**Cleo Action;**

Once a case has landed in the Oversights queue, the Clinical Coordinator can do one of three Oversight Validation actions;

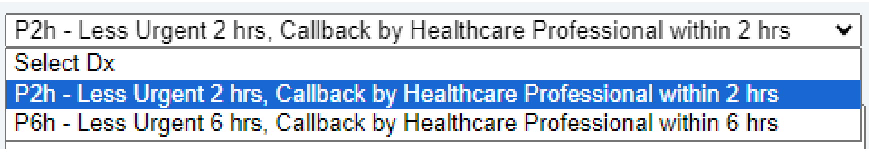
1. Approve
2. Clinical Co-Ordinator Review in progress
3. Further Clinical Input Required




When approving an appointment, the CC will need to either confirm or change the PPE requirement.




They will also need to confirm or amend the Priority of the Appointment / Home Visit.




**Cleo Audit;**

These actions will be recorded under the **finaldispositioncode, oversightvalidationtype**, & **oversight_base_triage_type** as below;

**Approved;**

| | | |
|---|---|---|
| breachwarnactualtime | 2025-06-24T12:54:03+01:00 | 2025-06-24T16:54:03+01:00 |
| breachwarnactualtimendt | 20250624T12:54:03+0100 | 20250624T16:54:03+0100 |
| callcomments | | [BR][Lucy Grinnell 24-Jun-2025 12:37] Validation Type: Approve, High Consequence Infectious Disease[BR]test |
| finaldispositioncode | | P6h |
| oversight_base_triage_type | ~ | High Consequence Infectious Disease |
| oversightvalidationreason | ~ | test |
| oversightvalidationtime | ~ | 20250624T12:37:34+0100 |
| oversightvalidationtype | ~ | Approve |
| oversightvalidationuser | ~ | CN\Lucy Grinnell/O\cleouat |
| utc_vw_sort | ~2025-06-24T13:14:03+01:00 | ~2025-06-24T17:14:03+01:00 |

**Further Clinical Input required;**

| Field ▲ | Old Value | New Value |
|---|---|---|
| callcomments | | [BR][Lucy Grinnell 24-Jun-2025 12:40] Validation Type: Further Clinical Input Required, No specific PPE requirements/infectious concerns[BR]please do a video call |
| oversightvalidationreason | ~ | please do a video call |
| oversightvalidationtime | ~ | 20250624T12:40:34+0100 |
| oversightvalidationtype | ~ | Further Clinical Input Required |
| oversightvalidationuser | ~ | CN\Lucy Grinnell/O\cleouat |

**CC Review in progress;**

| Field ▲ | Old Value | New Value |
|---|---|---|
| callcomments | | [BR][Lucy Grinnell 24-Jun-2025 12:39] Validation Type: Clinical Co-Ordinator Review in progress, Isolation Room/PPE Required |
| oversightvalidationreason | ~ | |
| oversightvalidationtime | ~ | 20250624T12:39:34+0100 |
| oversightvalidationtype | ~ | Clinical Co-Ordinator Review in progress |
| oversightvalidationuser | ~ | CN\Lucy Grinnell/O\cleouat |

## Appointment / Home Visit Arrival Time

**Cleo Action;**

Double click into the case in the relevant Queue> Navigate to the **Time Options** button on the top toolbar> Select **Arrived**

**Cleo Audit;**

Both Home Visit and Face-to-Face arrival times are recorded within the **Set Arrival Time** audit session, specifically **dtarrivedtime**

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Calls | Read Call | 30-Jun-2025 18:43 | Chelsea Stevens/cleout | 1751301788000 |
| Call | Call Data Change | 30-Jun-2025 18:41 | Code Signer/sehnp | 1751301674000 |
| Calls | Set Arrival Time | 30-Jun-2025 18:41 | Chelsea Stevens/cleout | 1751301668000 |
| Calls | Read Call | 30-Jun-2025 18:41 | Chelsea Stevens/cleout | 1751301664000 |

**Items**

| Field ▲ | Old Value | New Value |
|---|---|---|
| dtarrivedtime | | 20250630T18:41:08+0100 |

## Urgent Follow Up Active Time

**Cleo Action;**

Right click on the case in the Urgent Follow Up queue> select **Make Active**

**Cleo Audit;**

The action of making a case active from the Urgent Follow Up queue, before the time selected by the clinician will be recorded in the audit as below;

**Audit Sessions**

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | |
|---|---|---|---|
| Calls | Read Call | 01-Jul-2025 15:35 | Lucy Grinnell/cleouat |
| Calls | Read Call | 01-Jul-2025 15:35 | Chelsea Stevens/cleout |
| Call | Call Data Change | 30-Jun-2025 18:44 | Chelsea Stevens/cleout |
| Calls | New Call | 30-Jun-2025 11:00 | Chelsea Stevens/cleout |

**Items**

| Field ▲ | Old Value | New Value |
|---|---|---|
| all_view_include | OVERSIGHT_FOLLOW_UP | |
| breachactualtime | 2025-07-01T00:00:00 | 2025-07-01T00:44:21+01:00 |
| breachactualtimendt | 20250701T18:45:24+0100 | 20250701T00:44:21+0100 |
| breachstarttime | 20250701T00:00:00+0100 | 20250630T18:44:21+0100 |
| breachwarnactualtime | 2025-07-01T00:00:00 | 2025-07-01T00:24:21+01:00 |
| breachwarnactualtimendt | 20250701T18:45:24+0100 | 20250701T00:24:21+0100 |
| urgentfollowupremovereason | ~ | testing |
| urgentfollowupremovetime | ~ | 20250630T18:44:21+0100 |
| urgentfollowupremoveuser | ~ | CN\Chelsea Stevens/O\cleout |
| utc_vw_sort | ~2025-07-01T00:00:00 | ~2025-07-01T00:44:21+01:00 |

The *Old Value* for **all_view_include** will be OVERSIGHT_FOLLOW_UP and the *New Value* will be blank.

In the fields below you can also see the name of the User (**urgentfollowupremoveuser**) who carried out this action, along with the date and time (**urgentfollowupremovetime**).

## PLS Actioned

**Cleo Action;**

The Rota Team will have a queue of PLS cases to action each morning (Monday – Friday).

Navigate to the PLS Queue on the right had side of Cleo> double click into the case> choose **Successful Contact – Own GP to follow up,** then **Save**.

**Cleo Audit;**

The action of completing PLS (Successful contact - OWN GP to follow up) is recorded under the **pls_time** item within the audit. Here you will also be able to see any additional notes added at the time of completing PLS (**pls_reason**)

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| System | Audit Read | 01-Jul-2025 14:30 | Chelsea Stevens/cleout | 1751373053000 |
| Calls | Read Call | 01-Jul-2025 14:30 | Chelsea Stevens/cleout | 1751373041000 |
| Call | Call Data Change | 01-Jul-2025 14:30 | Code Signer/sehnp | 1751373030000 |
| Call | Call Data Change | 01-Jul-2025 14:30 | Chelsea Stevens/cleout | 1751373023000 |

*Items*

| Field | Old Value | New Value |
|---|---|---|
| pls_action | ~ | SUCCESSFUL_CONTACT_GP |
| pls_actiontext | ~ | Successful Contact - Own GP to follow up |
| pls_processed | ~ | 1 |
| pls_reason | ~ | Patient not registered with GP, unable to PLS |
| pls_time | ~ | 20250701T14:30:23+0100 |
| pls_user | ~ | CN\Chelsea Stevens/O\cleout |

Please note; When carrying out the PLS process, there are two more options which can be selected;

**Unsuccessful contact** – Will try again

**Unsuccessful contact** – Email sent

If either of these have been selected for a case, this will be recorded in the same section of the Audit above.

## Print Cases

**Cleo Action;**

Printing a case within Cleo can be done on right click or once double clicked into the case.

**Cleo Audit;**

The action of printing a case is recorded within the audit session as **Print**

*Audit Sessions*

The system is awaiting all audits to be transferred. You may not be seeing all audits available

| | | | | |
|---|---|---|---|---|
| Call | Call Data Change | 30-Jun-2025 18:02 | Chelsea Stevens/cleout | 1751299321000 |
| Calls | Read Call | 30-Jun-2025 17:59 | Chelsea Stevens/cleout | 1751299176000 |
| Calls | Print | 30-Jun-2025 17:59 | Chelsea Stevens/cleout | ASHT-DJ5SC7 |

## PEM Sent

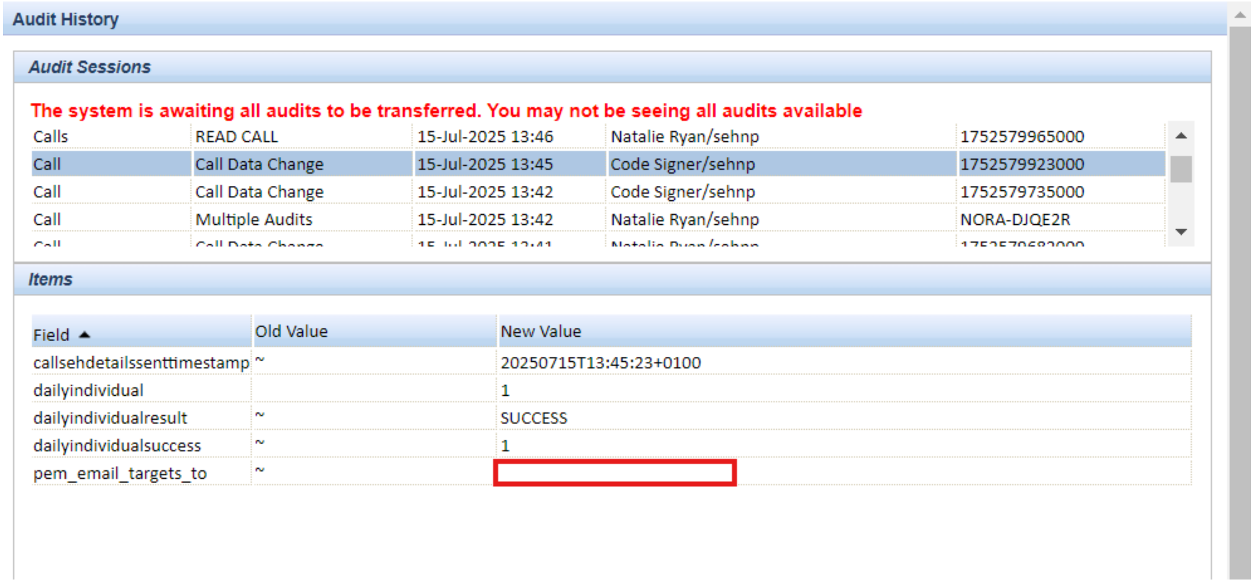
**Cleo Action;**

A PEM will automatically send to the patients GP Surgery within 5 minutes of a case being completed.

**Cleo Audit;**

If a PEM has been sent successfully the *New Value* for **dailyindividualresult** will be **SUCCESS**

Within this audit you will also be able to see the email address the PEM was sent to. This will be recorded under the *New Value* for the **pem_email_targets_to** field (red box below).



# Audit – Quick Reference

Please note that the list below highlights key words to look for in the audit. Some of these will be followed by values like True, False, Yes, No, Requested, or Received, indicating the status or action taken for that specific field.

| Role | Cleo Function | Key places to look / key wording |
|---|---|---|
| Operational | New Case added (Severnside Call Handler) | - Open case - Various sections<br>- Audit; within the first 'Multiple Audits' log |
| 111 | 111 (telephone call) case received | - itk_111_online (value of 0)<br>- Pathways |
| 111 | 111 Online case received | - itk_111_online (value of 1)<br>- Pathways |
| Operational | Successful & Unsuccessful contacts | - Open case and view the Comfort / Courtesy section<br>- Audit; courtesy_contact with a value of True or False |
| Operational | Log Call back | - Open case and view Log call back section<br>- Audit; callcallback |
| Operational | Add new symptoms | - Open case and view New Symptoms section<br>- Audit; callsymptoms |
| Clinical & Ops | Successful SMS | sms_count & sms_sent |
| Clinical & Ops | Unsuccessful SMS | sms_count & sms_sent |
| Clinical & Ops | Request Photo | goodsam_image_status (REQUESTED) |
| Clinical & Ops | Upload Photo | goodsam_image_ststus (RECEIVED) |
| Operational | Sync with PDS | pdstracednadverified |
| Operational | Trace with PDS | pdstracednadverified |
| Clinical & Ops | Add non clinical note | - Open case case & view New Symptoms section<br>- Audit; callcomments |
| Clinical & Ops | Change Subclassification | callsubclassificationmanual |
| Operational | Assign to Clinician | gpassignedname |
| Operational | Unassign | gpassignedname (*New Value*; BLANK) |
| Operational | Add Case Comments | call_casecomments |
| Operational | Operational - Book F2F Appointment | *Appt External and; dutybase, timeappointmentstart, dateappointmentstart,* appointmentsystem_launch |
| Operational | Book Home Visit | Dispatch to Car and; *callassignedvehicle* |
| Operational | Pass case to triaging clinician | cpl_outcome |
| Operational | Complete Case (No Clinical Input) Complete Case (Cancel) | callstatus (COMPLETE)<br>The reason for completing the case will be recorded underneath the callinformationaloutcomes field |
| Operational | Uncomplete a case | callstatus (NEW) |
| Clinical Navigator | Validate | casvalidationcount |
| Clinical Nav & Ops | Pinking | clinihighpriority |
| All Clinical & Ops | Sesui Click to Dial | sesuiid & sesuicallto |
| All Clinical | Clinical Failed Contact | cpl_exitreason & cpl_failedcontactreason |
| All Clinical | Save & Return to Queue | cpl_exitreason |
| All Clinical | Goodsam Video | vc_start |

| | | |
|---|---|---|
| All Clinical with PaCCs | PaCCs | - Pathways report<br>- Audit under Finish Consultation |
| All Clinical | Consultation Notes | View these by expanding the Consultation panel |
| All Clinical Prescribers | EPS | epstypes & epsdrugs |
| All Clinical Prescribers | FP10 | epstypes & epsdrugs |
| All Clinical & Ops | ShareMyCare Viewed | SMC View |
| All Clinical | Summary Care Record Viewed | Open case & view Symptoms section |
| All Clinical | GP Connect HTML Viewed | GP Cpnnect View |
| All Clinical | C-PIS Viewed | CPIS View |
| All Clinical & Ops | Pathways Viewed | View Pathways |
| All Clinical | Agency Referral | agency_referral_to |
| All Clinical | Urgent Follow up, F2F Home Visit request | tar_cleo_call_base<br>tar_cleo_call_ref<br>tar_cleo_call_sub_service |
| All Clinical | End Assessment – Verification of death | cpl_auditquestions |
| All Clinical | End Assessment – Safeguarding | cpl_auditquestions |
| All Clinical | End Assessment – Non Clinical Input required | cpl_nonclinicalsupporttocomplete |
| All Clinical | End Assessment – MHCN Review required | cpl_mhcliniciansignoffrequired |
| All Clinical | End Assessment – Medication from Stock | cpl_medicationissuedfromstock |
| All Clinical | End Assessment – Informational Outcome | cpl_outcome |
| All Clinical | End Assessment – Further GP Action (PLS) | cpl_furtheractiongp |
| All Clinical | End Assessment – Read Code | cpl_readcodes |
| Clinical Coordinator | CC Approved, Further Clinical Input or Review in Progress | oversightvalidationtype |
| Clinical Coordinator | CC Approved timeframe | finaldispositioncode |
| Clinical Coordinator | CC Approved PPE requirements | oversight_base_triage_type |
| Driver / Receptionist | Appointment / Home Visit Arrival time | Set Arrival Time, dtarrivedtime |
| All Clinical | Urgent Follow up Active time | urgentfollowupremovetime<br>urgentfollowupremoveuser |
| All Clinical & Ops | Print | Print |
| Rota Team | PLS Actioned | pls_time |
| Automatic | PEM sent to GP Surgery | dailyindividualresult<br>pem_email_targets_to |

## Tables

| Version | Date | Author | Comments |
|---|---|---|---|
| V0.1 | 27/06/2025 | Chelsea Stevens | Document Created |
| V1 | 22/07/2025 | Chelsea Stevens | Document Published |
| V1.1 | 31/07/2025 | Chelsea Stevens | Updated information on cases received via 111 & added wording to Quick Reference table. |