Care Control July 2019 – Part 2 Release Note

Care Control Windows 3.24+

Care Control Mobile 4.31+

Care Control Pocket 1.29+

Contents

Foreword by Matt Luckham, Creator of Care Control

For some of our customers, the changes to the new rota system have been challenging to adjust to and certain features have caused frustration. This update will address some of these issues.

This update completes the first set of integrations with the Payroll System. We have also made several changes to the rota system to reduce the report size and added reports that users felt were missing.

Please contact the Support team to report any issues that you need us to investigate.

Matt Luckham, July 2019

Introduction

This is a minor system update focussing on addressing issues associated with the major update released at the end of June.

System Versions Covered

This release covers changes to your Care Control Database, Care Control Windows, Care Control Mobile and Care Control Pocket.

After this update you should be using:

- CC Windows **3.24**
- CC Mobile **4.31**
- CC Pocket **1.29**

Summary of Changes

| Area	System(s)	Detail
Payroll	CC Windows	• New Payroll Pay Rates Area • Integration of new rota systems into Timesheets • Integration of Holidays into Timesheets
Staff Module	CC Windows	• Modifying Roles
Roster System	CC Windows	• Reverse Live Rota Changes • Slim print option • Grouping Option for Week Rota View • Agency User Guide • New Reports

Payroll Changes

New Payroll Pay Rates Area

We removed the pay rates area from the Staff Module in the last update. This is to allow organisations to easily separate the management of the pay from the management of the staff.
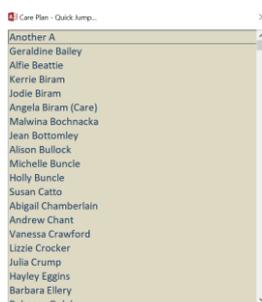
The new area is here: -
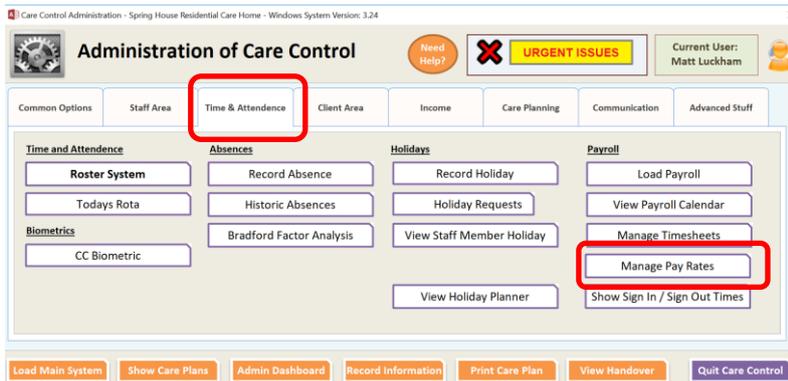
This will load the following screen: -
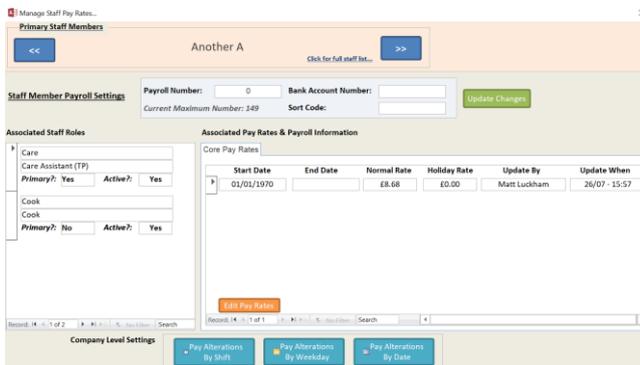
From this screen you can search for any staff member by clicking on the staff members name: -

For each staff member you can update the bank account and payroll reference: -

Against each staff member, their roles are listed on the left-hand side: -

If you click on the staff role, you will see the pay value on the right-hand side. You can now enter pay rates with start and end dates. Edit the pay rates by clicking this button: -


Holiday Pay Rate

You will notice there is a holiday pay rate. This can be used by staff who have a mixed rota and may be paid different rates for different shifts. If you set this pay rate to zero, the hourly rate will be used for any holiday pay.

Integration of Rota into Payroll

The new rota system has been integrated into the payroll system. This includes the new holidays system which is closely aligned to the recent rota change.

The staff timesheets are now based on the rota system: -
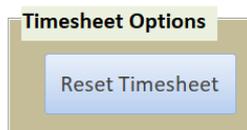
When staff select Reset Timesheet, the system will generate a timesheet based on any shifts assigned to that staff member on the live rota.

A significant change is how holidays are now dealt with on the staff members timesheet. In the last update we moved holidays so that they are based correctly on the staff contracted hours. This allowed you to ask staff to book the holiday even if they are not working.

However, for the payroll to be correct, we still need to show holiday hours in the staff timesheets but apportioned correctly based on the roles of that staff member.

Example of Holiday Treatment in Payroll

A staff member has two roles of a care homes: -

- Role 1 – Care Assistant – Contracted Hours – 16 Hours Per Week
- Role 2 – Domestic – Contracted Hours – 12 Hours per Week

The staff member books a holiday for 1 week. The total hours booked would be 28 hours.

In the payroll we need to assign holiday hours booked to the Care Assistant Role, and holiday hours booked for the Domestic Role. This apportionment is calculated based on the average hours assigned to each role's contract across the holiday year.

This is apportionment is important if the role was started during the holiday year.

In this example, both roles were started at the beginning of the year so the apportionment would be: -

- Domestic: 43%
- Care Assistant: 57%

On the timesheet, the holidays hours for the week will be split as follows: -

Care Assistant Role	Domestic Role
Day 1: 2.28 hours	Day 1: 1.72 hours
Day 2: 2.28 hours	Day 2: 1.72 hours
Day 3: 2.28 hours	Day 3: 1.72 hours
Day 4: 2.28 hours	Day 4: 1.72 hours
Day 5: 2.28 hours	Day 5: 1.72 hours
Day 6: 2.28 hours	Day 6: 1.72 hours
Day 7: 2.28 hours	Day 7: 1.72 hours
Total: 15.96 hours	Total: 12.04

The total is still 28 hours, but the roles have had the correct hours assigned.

Notice how the holiday hours are spread across each day of the booked holiday. This is a big difference from the previous system and staff will need to be made aware of this.

Other Payroll Integrations

We have added the following additional integrations into the Payroll Module.

On the Payroll Day View, the three icons on the day now have the following functionality: -
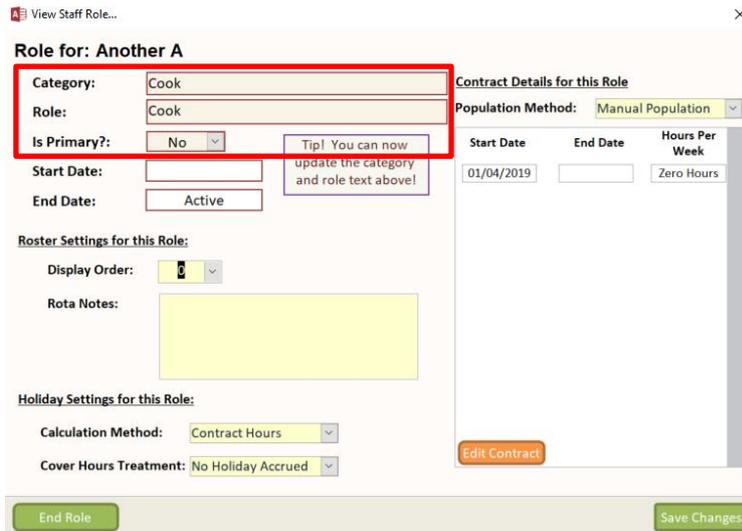
Payroll Date

25/06/2019

= Continues to load the timesheet screen

= Launches the day roster view

= Launches the staff members holiday

Modifying Roles

We have made some small amendments to how you can modify role information. When you view a role, you can now: -

1. Modify the Category
2. Modify the Role
3. Set the Primary Flag to Yes

If you set the Is Primary flag to Yes, the system will transfer that Role to become the primary role for the staff member.
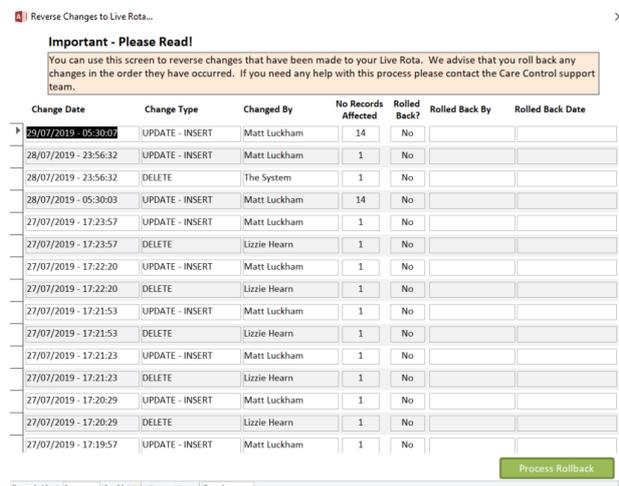
Roster System Changes

We have made further changes to the Roster System.

Reverse Changes

It is possible with the new Roster System to make some significant changes to the live rota, especially if you are processing a template. A feature that has been added is the ability to reverse any changes made.
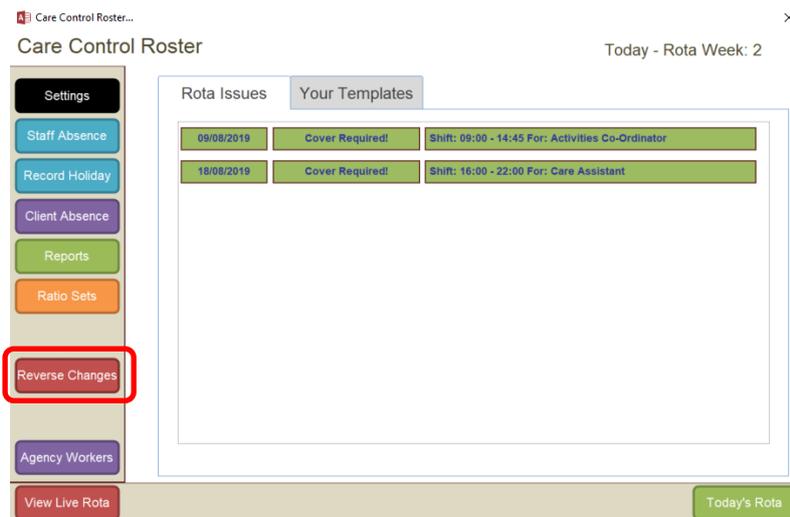
This now loads the Reverse Changes Screen: -

This screen shows the list of all changes that have happened to the live rota.

The Change Type and Change Date is important as this indicates the type of change to the live rota.

Different Types of Changes

When you make a change to the live rota, there are three processes that are initiated: -

1. **Adding a New Rota Cell**

   This is what happens when you click on the plus icon: - Sun 28 🔄

   This also happens when you click a blank cell or when you process a template which adds rows.

   On the Reverse Changes screen these entries will appear as single line entries with a specific Change Date and Time: -

29/07/2019 - 05:30:07	UPDATE - INSERT	Matt Luckham	14	No		

   In the above entry, 14 records where added to the Live Rota.

2. **Deleting a Rota Cell**

   This is what happens when you highlight a cell and press the Delete Icon: - 🗑️

   On the Reverse Changes screen you will see a DELETE entry: -

29/07/2019 - 09:31:30	DELETE	Vanessa Crawford	1	No		

3. **Update to a Rota Cell**

   The most common change to the Live Rota is when you update a cell. This could be when someone is sick and can no longer work, when you are covering a cell or adjusting the time.

   The process the system follows is that the original entry is deleted and the updated entry is inserted into the Live Rota. When this happens, you will see two entries in the Reverse Changes screen: -

29/07/2019 - 09:30:42	UPDATE - INSERT	Vanessa Crawford	1	No		
29/07/2019 - 09:30:42	DELETE	Vanessa Crawford	1	No		

   The fact that these two entries have the same Change Date / Time indicate that they are part of an Update process.

Reversing Changes

If you want to reverse a change, simply make sure that the row in question is selected: -

29/07/2019 - 09:39:11	UPDATE - INSERT	Vanessa Crawford	1	No		
29/07/2019 - 09:39:11	DELETE	Vanessa Crawford	1	No		

You then select the Process Rollback: -

When you select this entry, the screen will reload indicating that the entry has been rolled back: -


Advice on Rolling Back Changes

These are important rules to note about rolling back changes to your Live Rota: -

1. Once an entry has been rolled back it cannot be rolled back again or changed.

2. Rolling back an entry also creates a new entry which in turn can be rolled back. Rolling back a change is the same as completing the reverse of the original change.

3. The order you roll back a change is important, especially to rolling back updates. We advise that you roll back in the order that they appear on the Reverse Changes screen.

Slim Report Options

The print options in both the Live Rota and the Template have been changed to a slimmer report which does not include the Allocations. The prints are available from this icon: -
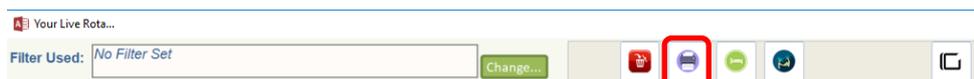
Grouping Option for Week Rota View

In the initial release, the Live Rota grouped staff based on the original target role. This meant that if a staff member covered a role different to their own, they would appear at different places on the live rota: -

In the above example, G Oliver who is a Care Assistant is to cover the role of Care Manager. As you can see the entries are at different parts on the rota.

This behaviour is by design. It indicates that a staff member is doing a different role than planned.
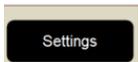
However, some customers prefer to group any worked shifts together by staff member.
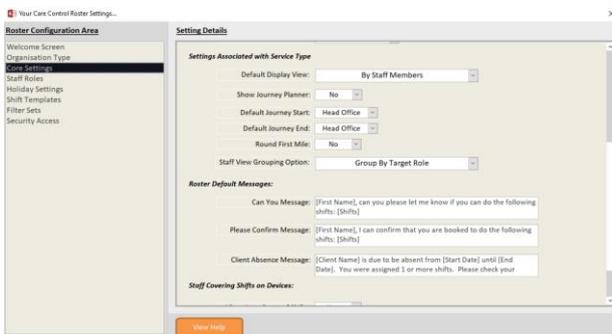
Group by Staff Member

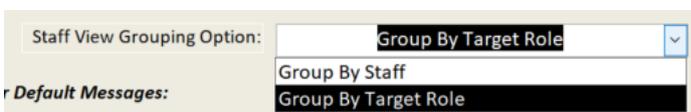To change the grouping by staff member you need to do the following: -

Click on Settings: -

Navigate to the Core Settings area, and change the setting for Staff View Grouping Option: -

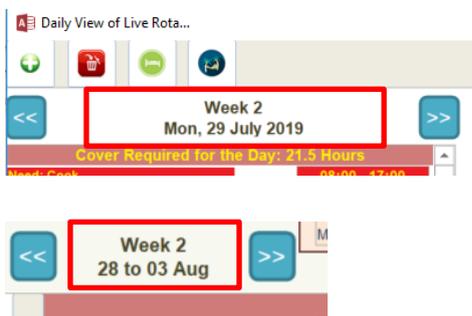If you change this grouping to Group by Staff the output is changed: -

Quick Jump to Rota Date

We have added the ability to quickly jump to a date on either the Day Rota or the Week Rota view: -

Clicking on these date fields will open a date entry screen: -
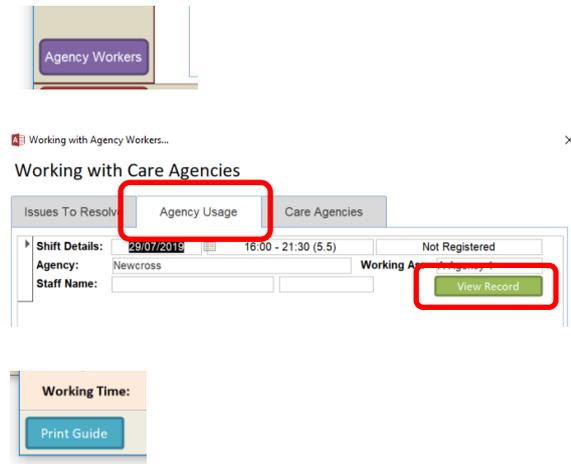

Entering a date in this screen will then jump the rota to that date.
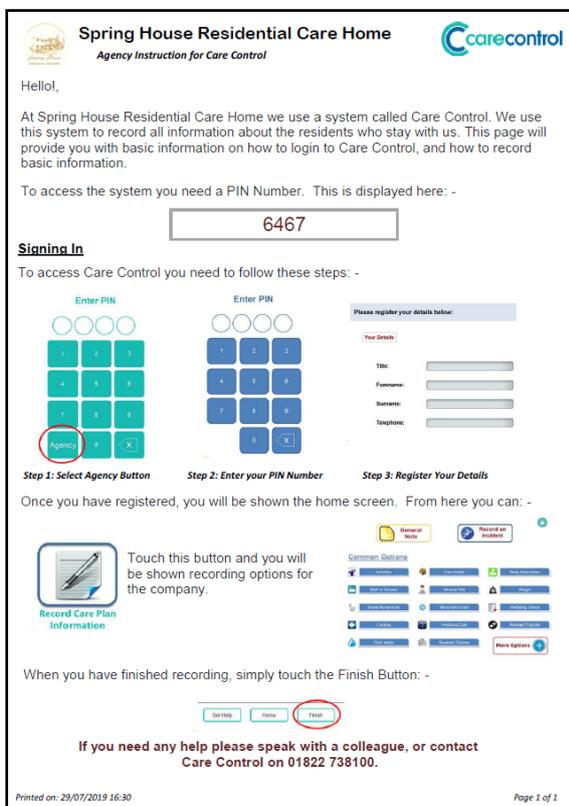
Agency User Guide

If you use Agency Staff with the Roster we have implemented a user guide as part of the system.

This can be printed and shared with the Agency Worker at the start of their shift.

To access the printout, go to: -

This will print a user guide for the Agency Worker: -

Example

New Roster Reports

We have added several new reports: -

Category	Report Name	Description	Report Type
Core Rota Reports	Slim Live Rota - By Staff	This report displays the live rota, but without the allocations.	Formatted
Template Analysis	Full Template Extract	This report extracts all of the template data on your system.	Excel
Template Analysis	Active Template Extracts	This report extracts the active templates data only.	Excel
Template Analysis	Active Template vs Contract	This report shows the average hours versus the current contract value.	Excel
Core Rota Reports	Future Live Rota	This report shows the future live rota from todays date forward.	Excel
Core Rota Reports	Full Live Rota Extract	This report extracts all of your live rota data going back 1 year and forward until the end.	Excel
Core Rota Reports	Live Rota vs Contract	This report shows the live rota broken down into Week 1 Start Dates, showing the average hours worked over the next N weeks. It also shows the contract hours at that time.	Excel