

Care Control July 2019 Release Note

Care Control Windows 3.21+

Care Control Mobile 4.30+

Care Control Pocket 1.28+

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Foreword by Matt Luckham, Creator of Care Control

The replacement of the Rota System is finally here! A huge amount of work has been completed on developing and testing this new system. With many new features included, this has been a massive challenge for everyone at Care Control in completing this key update.

Not that we have finished it of course! With all updates of this size, there is still more work to be completed, but with any large projects we had to draw the line at some point otherwise the development would never stop!

The biggest challenge has been migrating the existing data over to the new rota system. We have so many customers using the existing system, their data needs to be secured into the new format.

However, the old rota system needed to be changed. For accurate holidays, easy preparation of templates, to support other week combinations to name but a few reasons! But I know for many of our customers (including my own Care Home), this change will be difficult.

We have also included a new feature in this updated called Memory Box. This is a new area which will allow Family Members to load pictures, videos, internet links directly into Care Control. I am excited about this new development as it starts to widen the usage of Care Control to people outside of the care setting.

Following this update there will be lots of smaller updates, so bear with us while the new Rota System settles down and we fix any issues that we missed in the testing that we have completed to date.

Matt Luckham, June 2019

Introduction

This is a major system update with many changes affecting several core Care Control systems.

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 3.21, CC Mobile 4.30 and CC Pocket 1.29.

Summary of Changes

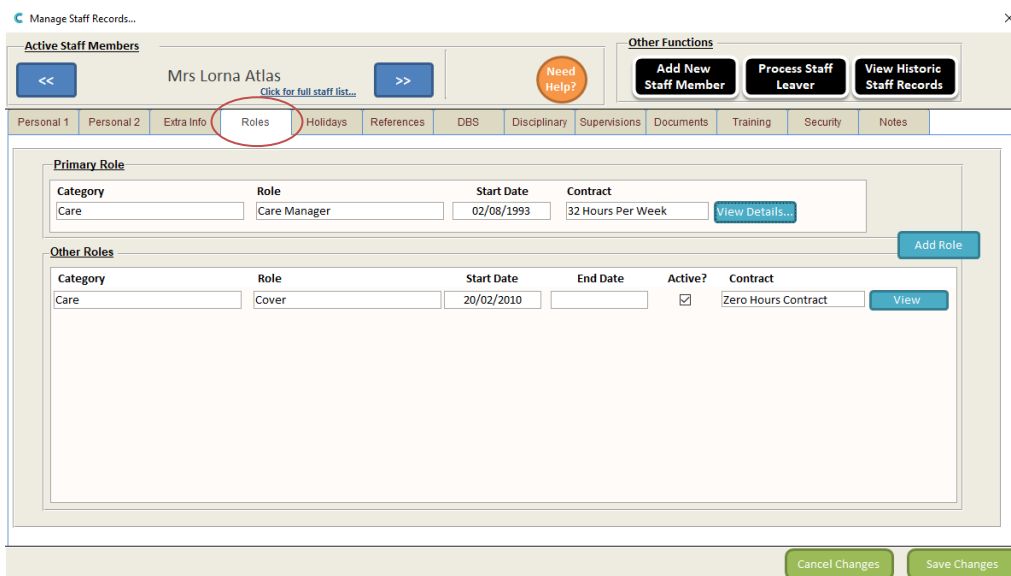
Area	System(s)	Detail
Staff Module	CC Windows	<ul style="list-style-type: none"> • Removal of Linked Staff, introduction of Roles • Weekly Contract Hours • Holiday Settings • Holiday Bookings / Cancellations/ Requests • Staff leaver process
Roster System	CC Windows	<ul style="list-style-type: none"> • Roster Settings • Templates • Week View Rota • Day View Rota • Rota Issues • Covering Shifts • Client Absences • Journey Planning • Agency Workers
Memory Box	CC Mobile	<ul style="list-style-type: none"> • Recording a memory • Reviewing a memory • Scoring a memory with service user
Installation	CC Windows	<ul style="list-style-type: none"> • Office 365 Installation
QR Codes	CC Windows	<ul style="list-style-type: none"> • Security Reference

Staff Module Changes

The staff module has had a number of new changes, including a complete re-write of the holiday system.

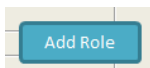
Staff Roles

We have removed the linked record from the staff module and replaced this with Roles. A staff member can have any number of roles. Each role has settings and a contract associated with it.

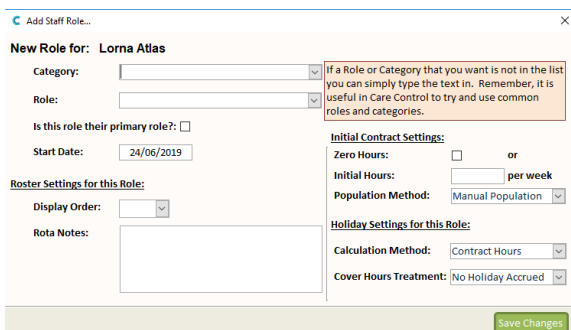


Adding a Role

You can add a role to the staff member by clicking on this button: -



This brings up the following screen: -



Here you can either select or enter a category, a role and a start date. If this role is going to be the primary role for this staff member tick the “Is this role their primary role?” Box. You can also set the Roster Display Settings and add any Rota Notes.

You also have some key contract and holiday settings: -

Initial Contract Settings:

Zero Hours: or

Initial Hours: per week

Population Method:

Holiday Settings for this Role:

Calculation Method:

Cover Hours Treatment:

If this is a Zero Hours contract tick the zero hours box, otherwise enter the contractual amount of hours per week.

The Population Method defines how the contract will be maintained going forward. You have two options: -

1. Manual Population (Default)

Administrators will be responsible for maintaining any changes to the contract.

2. By Processed Template

As Roster Templates are processed, if the average weekly contractual amount changes this will automatically update the staff member's contract.

Holiday Settings at Role Level

There are two settings at Role Level that are to do with Holidays: -

1. Calculation Method

How is the holiday allowance calculated? The options are: Contract Hours or Accrued as Worked.

2. Cover Hours Treatment

What happens if the staff member in this role works more than their contracted hours? Options are: Holiday Accrued or No Holiday Accrued.

Viewing a Role

The roles that are connected to a staff member can be viewed by clicking on the: -



or buttons. When clicked the following screen is shown: -

View Staff Role...

Role for: Lorna Atlas

Category: Contract Details for this Role

Role: Population Method:

Is Primary?:

Start Date:

End Date:

Roster Settings for this Role:

Display Order:

Rota Notes:

Holiday Settings for this Role:

Calculation Method:

Cover Hours Treatment:

Start Date	End Date	Hours Per Week
24/03/2019	04/05/2019	32.00
05/05/2019	11/05/2019	32.00
12/05/2019	25/05/2019	32.00
26/05/2019	22/06/2019	32.00
23/06/2019		32.00

On this screen you can change the holiday settings and Roster Settings. If the role is not the primary role you can End the Role by clicking: - . You will be asked to confirm the last working day for that staff member. If the role is a Primary Role you cannot end it. You first must move the primary flag to a different role.

Editing Role Contract

Against each role is a contract. The contract is used to calculate the holiday allowance for that role. You can edit a contract to allow you to modify the hours per week.

Contract Details for this Role

Population Method:

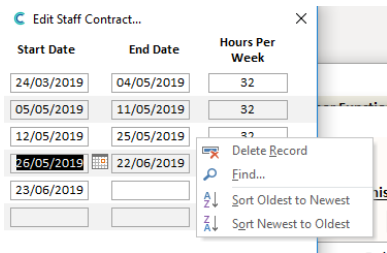
Start Date	End Date	Hours Per Week
24/03/2019	04/05/2019	32.00
05/05/2019	11/05/2019	32.00
12/05/2019	25/05/2019	32.00
26/05/2019	22/06/2019	32.00
23/06/2019		32.00

Edit Staff Contract...

Start Date	End Date	Hours Per Week
<input type="text" value="24/03/2019"/>	<input type="text" value="04/05/2019"/>	<input type="text" value="32"/>
<input type="text" value="05/05/2019"/>	<input type="text" value="11/05/2019"/>	<input type="text" value="32"/>
<input type="text" value="12/05/2019"/>	<input type="text" value="25/05/2019"/>	<input type="text" value="32"/>
<input type="text" value="26/05/2019"/>	<input type="text" value="22/06/2019"/>	<input type="text" value="32"/>
<input type="text" value="23/06/2019"/>	<input type="text" value=""/>	<input type="text" value="32"/>
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

When editing a contract, the End Date of the previous record must be only 1 day behind the Start Date of the next record.

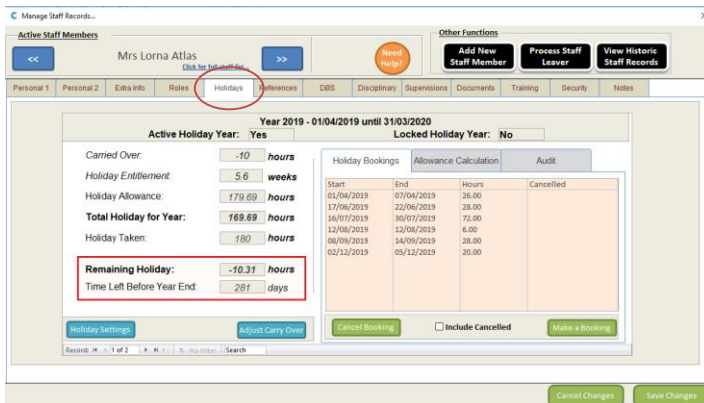
If you right click on a row whilst editing a contract you can delete a record: -



Holidays

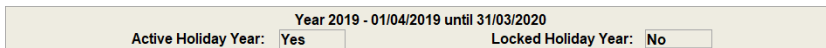
As part of this update the holidays within Care Control have been rewritten. Holidays in Care Control is now based on contracts which are associated with Roles. In addition there are settings associated with a staff member or at a company level.

Within the Staff Module there is a Holiday tab which contains holiday information for that staff member record: -

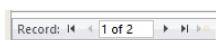


Holiday Screen

At the top of the screen you have the holiday year values: -



You can navigate to each open holiday year by using the navigation buttons at the bottom of this screen: -



On the left we have the following table: -

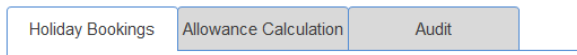


The values here are: -

- Carried Over – This is a positive or negative number that can be set using the Adjust Carry Over button.
- Holiday Entitlement – The base number of weeks that the staff member is entitled to.

- Holiday Allowance – The number of hours that have been calculated.
- Total Holiday for Year – The total of Carried Over and Holiday Allowance
- Holiday Taken – How many hours have been booked
- Remaining Holiday – Total Holiday for Year minus Holiday Taken
- Time Left Before Year End – Number of days left in his holiday year

On the left there are three tabs: -



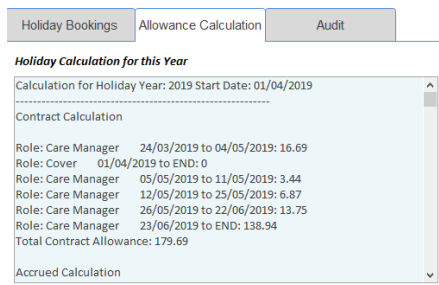
Holiday Bookings displays all of the current holiday books for this year for this staff member: -

Start	End	Hours	Cancelled
01/04/2019	07/04/2019	26.00	
17/06/2019	22/06/2019	28.00	
16/07/2019	30/07/2019	72.00	
12/08/2019	12/08/2019	6.00	
08/09/2019	14/09/2019	28.00	
02/12/2019	05/12/2019	20.00	

Include Cancelled

Bookings can be cancelled on this screen or additional bookings made.

Allowance Calculation displays details about how the holiday allowance for that year has been calculated: -



Holiday Calculation for this Year

Calculation for Holiday Year: 2019 Start Date: 01/04/2019

Contract Calculation

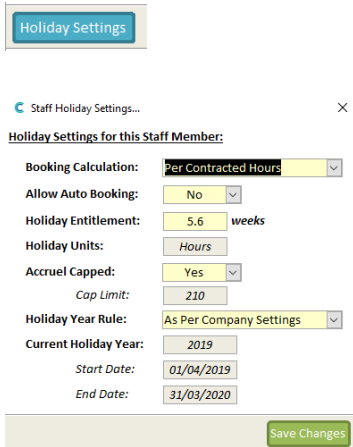
Role: Care Manager 24/03/2019 to 04/05/2019: 16.69
 Role: Cover 01/04/2019 to END: 0
 Role: Care Manager 05/05/2019 to 11/05/2019: 3.44
 Role: Care Manager 12/05/2019 to 25/05/2019: 6.87
 Role: Care Manager 26/05/2019 to 22/06/2019: 13.75
 Role: Care Manager 23/06/2019 to END: 138.94
 Total Contract Allowance: 179.69

Accrued Calculation

Audit – this feature is not enabled yet.

Holiday Settings

Against each staff record are holiday settings. These can be used to override the default settings for the company: -



These settings are also recorded as a default for the company in the Roster Settings (see below).

The settings are as follows: -

<p>Booking Calculation</p>	<p>This defines how the holiday amount is calculated. There are four options: -</p> <ol style="list-style-type: none"> 1. Per Contracted Hours <p>Using the contract, the system will calculate the amount of leave based on the start and end dates of the contract. For example, if a staff member is on a 25 week contract and tries to book 4 days of holiday the system will calculate: - $25 / 7 * 4 = 14.5$ hours holiday. The calculation is amended for multiple roles and contract changes across the holiday booking dates.</p> 2. As Planned Work <p>Looking at Active Templates Only, the system will use this information to calculate what hours the staff member would work using the start and end dates.</p> 3. User Defined <p>This will ask the user to enter the number of hours they wish to book for the period of time they are booking.</p>
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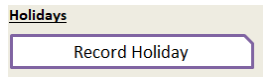
	<p>4. Manager Defined</p> <p>If you select this option, the manager must enter the number of hours when the request is authorised.</p>
<p>Allow Auto Booking</p>	<p>If this is set to Yes, any bookings the user makes, the system will try and auto-book based on your Roster Settings Holiday Rules. If set to No, all bookings will require manager sign off.</p>
<p>Holiday Entitlement</p>	<p>How much holiday time by default is allocated to the staff member? The default is the national minimum amount of 5.6 weeks.</p>
<p>Accrual Capped</p>	<p>If this is set to Yes, the accrual maximum is set to 210 hours. If not, a staff member could accrue more hours than 210.</p>
<p>Holiday Year Rule</p>	<p>There are three settings to define the holiday year: -</p> <ol style="list-style-type: none"> 1. As Per Company Settings This is the default Start and End Date for the holiday year as defined in the Holiday Settings within Roster. 2. By Birthday This will change the holiday year so that the staff member's birthday is used to define the start and end date of the holiday year. 3. By Start Date This will change the holiday year so that the staff member's start date is used to define the start and end date of the holiday year.

Booking a Holiday

Holidays can be booked through 4 different methods: -

1. Administrator – CC Windows

If you are an administrator you can book holidays through the Admin Centre on CC Windows. Either you can select: -



Or within a Staff Record you can select: -

Year 2019 - 01/04/2019 until 31/03/2020

Active Holiday Year: **Yes** Locked Holiday Year: **No**

Carried Over: hours

Holiday Entitlement: weeks

Holiday Allowance: hours

Total Holiday for Year: hours

Holiday Taken: hours

Remaining Holiday: hours

Time Left Before Year End: days

Start	End	Hours	Cancelled
01/04/2019	07/04/2019	26.00	
17/06/2019	22/06/2019	28.00	
16/07/2019	30/07/2019	72.00	
12/08/2019	12/08/2019	6.00	
08/09/2019	14/09/2019	28.00	
02/12/2019	05/12/2019	20.00	

Buttons: Cancel Booking, Include Cancelled, **Make a Booking**

Once you select a staff member, you will see a screen like below: -

Manage Your Holiday

Hello Lorna Atlas,
You can manage your holiday on this page including making bookings.

Manage Your Holiday Bookings

Year	Start Date	End Date	Total Allocation	Remaining Time	Booking Time Remaining
2019	01/04/2019	31/03/2020	169.69	-10.31	277
2020	01/04/2020	31/03/2021	179.2	23.2	642

Stage 1 - Enter your holiday dates

Holiday Start Date: Holiday End Date:

Start Time: End Time: **Next Step**

As Admin, force the booking to be made.

Dependent upon the Booking Calculation method for the staff member in question, this form will behave differently.

When Next Step is pressed, the system will examine the Booking Calculation method and either present the number of hours, ask for hours to be inputted, or (if manager defined) just present any issues.

Manage Your Holiday
×

Hello Lorna Atlas,

You can manage your holiday on this page including making bookings.

Manage Your Holiday Bookings

Your Holiday Allocation

Year	Start Date	End Date	Total Allocation	Remaining Time	Booking Time Remaining
2019	01/04/2019	31/03/2020	169.69	-10.31	277
2020	01/04/2020	31/03/2021	179.2	23.2	642

Stage 1 - Enter your holiday dates

Holiday Start Date:

Start Time:

Holiday End Date:

End Time:

Next Step

Stage 2 - Hours to Book:

Calculated Hours to Book:

Based on Contracted Hours

There are issues with this booking based on your company rules.

View Issues...

Reset Form
 As Admin, force the booking to be made.
Process Holiday

All holiday bookings will be checked against the holiday rules that are switched on within the Roster Settings. If there are issues then a message will be shown and a button “View Issues” will be available.

Checking your Holiday...

Sorry, this booking could fail for the following reasons: -

Failed - Check 2 - Has this holiday period already been allocated to other staff members?

The following members of staff are already away for part or all of your requested leave periods:

- Ruth James - Care - 21/06/2019 to 29/06/2019
- Sally Harris - Care - 23/06/2019 to 29/06/2019
- Regina Thomas - Care - 24/06/2019 to 28/06/2019
- Edith Jones - Care - 24/06/2019 to 29/06/2019
- Dolores Smith - Care - 28/06/2019 to 29/06/2019
- Lauren Smith - Care - 29/06/2019 to 29/06/2019
- Lauren Smith - Care - 30/06/2019 to 16/07/2019
- Dolores Smith - Care - 30/06/2019 to 30/06/2019
- Gail James - Care - 01/07/2019 to 03/07/2019

At any time you can Reset the Form.

As an administrator you have an additional option: -

As Admin, force the booking to be made.

If you tick the box, when you select Process Holiday the holiday will be booked, regardless of whether or not the booking breaks any company rules.

2. CC Windows

Staff can book holidays in the main windows system by going to: -

Personal Staff

Update Your Staff Record

Manage Your Holiday

View Holiday Planner

This presents the same screen as in the Administration Mode, but without the override option.

3. CC Mobile

You can book holidays using CC Mobile: -



This presents a similar looking screen to complete: -

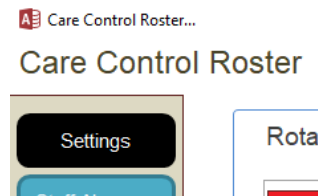
4. CC Pocket

Staff can now use CC Pocket to request holiday: -

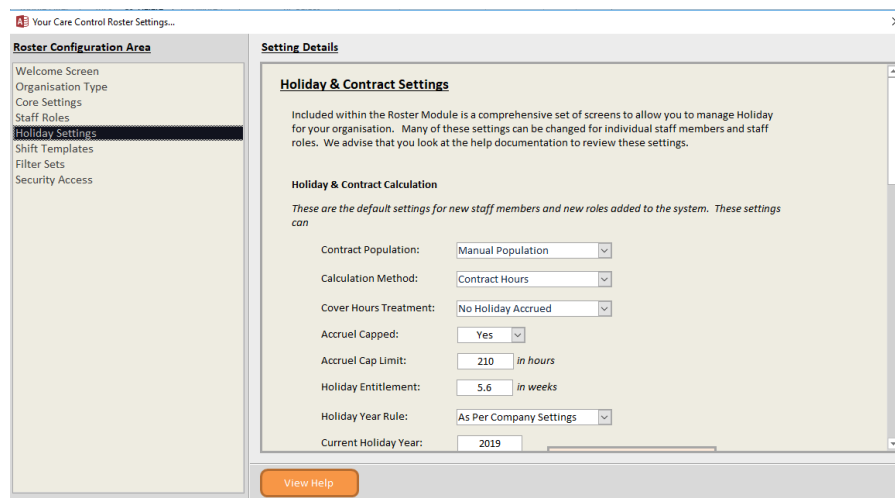
This is available for staff with Pocket on their own devices.

Holiday Booking Rules

When staff try and make a holiday booking, the system will run a series of checks and present back any issues. These are called Holiday Booking Rules and they are defined within the Roster System Settings: -

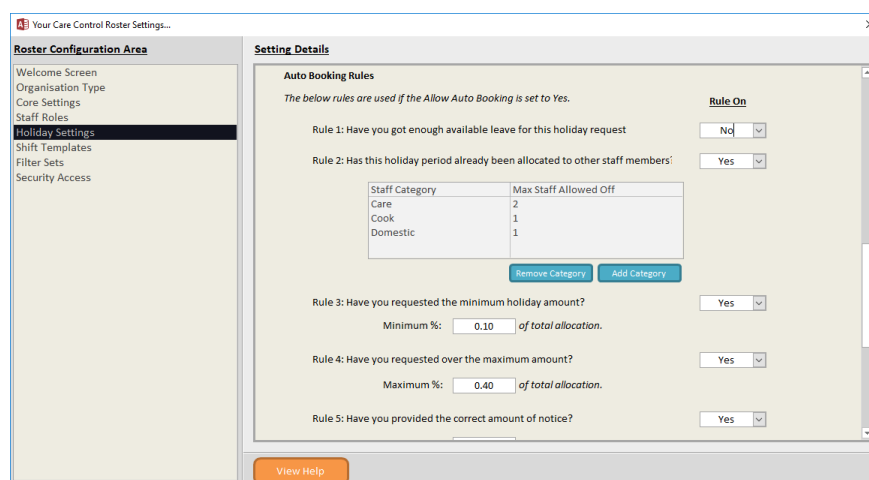


Clicking on Settings will display the following page: -



This page contains all the defaults for holidays within your Care Control. The settings at the top of the page are the defaults for any new staff.

As you scroll down you will see the Auto Booking Rules section: -



There are 7 rules in total: -

Rule 1: Have you got enough available leave for this holiday request?

If this is set to Yes, the system will check the total hours you are trying to book against the number of hours you have remaining for that holiday year.

Rule 2: Has this holiday period already been allocated to other staff members?

You have a small table that contains staff categories and the maximum number of staff that are allowed off.

Staff Category	Max Staff Allowed Off
Care	2
Cook	1
Domestic	1

You can update this table and the system will use it to confirm that no other staff are off during that time.

Rule 3: Have you requested the minimum holiday amount?

This is a percentage of the total holiday allowance. For example, if this value was set to 10% and the total holiday allowance for that holiday year was 100 then the minimum number of hours would need to be 10. This rule is to stop staff just taking a single day off without management oversight.

Rule 4: Have you requested over the maximum holiday amount?

Exactly the same as Rule 3, but this is the upper limit of holiday that can be automatically booked.

Rule 5: Have you provided the correct amount of notice?

This is a value in days which defines the minimum amount of notice that the staff member must provide before the start of the holiday being booked.

Rule 6: Have you tried to book holiday over reserve days?

You have a small table which can contain a series of reserve dates. You can also select to automatically include bank holidays or days in December.

Reserve Date	Description
25/12/2019	Christmas Day
24/12/2019	Xmas Eve
23/12/2019	Xmas Reserved
22/12/2019	Xmas Reserved

Automatically include all Bank Holidays

Include all of December as a reserve date each year

Rule 7: Is there at least a X day gap between any of your other holiday bookings?

If this is set to Yes, the staff member holiday booking cannot be less than the number of days set for this rule.

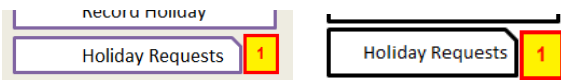
These rules can be used to control automatic holiday booking by staff members.

If a holiday booking fails these rules and the override option has not been selected, the holiday booking will be placed into the Holiday Request area.

Holiday Requests

Any staff holiday requests that have not been booked will be recorded as a Holiday Request.

On the Administration Centre and the Admin Dashboard within CC Windows, if you have any outstanding Holiday Requests a number is shown: -



If you click the Holiday Requests option, you will see the following screen: -

Historical Requests
Outstanding Requests
X

Staff Name	Start Date	End Date
Laura Atlas	28/06/2019	04/07/2019

About this request:

Start Date: End Date:

Start Time: End Time:

Booking Method:

Hours to Book:

Contracted Hours:

Planned Hours:

Request Status

Completed By:

Status:

About this staff member:

Name:

Primary Role:

Holiday Allocation: [View Bookings](#)

Holiday Remaining:

Holiday Accrued So Far: [Send Message](#)

Current Contract:

Other Absences during this Period:

Staff Name	Start Date	End Date	Reason
Leah Hughes	19/05/2018	01/12/2019	Rota Change
Ruth James	21/06/2019	29/06/2019	Holiday
Sally Harris	23/06/2019	29/06/2019	Holiday
Michelle Jenkins	23/06/2019	31/08/2019	Unpaid Leave
Edith Jones	24/06/2019	29/06/2019	Holiday
Regina Thomas	24/06/2019	28/06/2019	Holiday
Dawn Harris	26/06/2019	02/07/2019	Sickness
Claire Thomas	26/06/2019	28/06/2019	Sickness
Annie Thomas	26/06/2019	04/07/2019	Sickness
Dolores Smith	28/06/2019	29/06/2019	Holiday
Lauren Smith	29/06/2019	29/06/2019	Holiday
Julia Jones	29/06/2019	29/06/2019	Sickness
Lauren Smith	30/06/2019	16/07/2019	Holiday
Dolores Smith	30/06/2019	30/06/2019	Holiday
Gail James	01/07/2019	03/07/2019	Holiday
Geraldine Jones	02/07/2019	05/07/2019	Holiday
Dolores Smith	04/07/2019	17/07/2019	Sickness

Analysis Response:

Failed - Check 2 - Has this holiday period already been allocated to other staff members?
The following members of staff are already away for part or all of your requested leave period: -

Ruth James - Care - 21/06/2019 to 29/06/2019
Sally Harris - Care - 23/06/2019 to 29/06/2019

Confidential Notes on this Booking:

Refuse Request
Need Help?

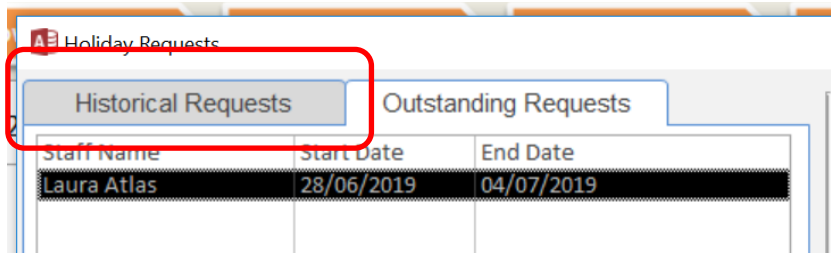
View Rota
View Calendar

Save Changes
Authorise Request

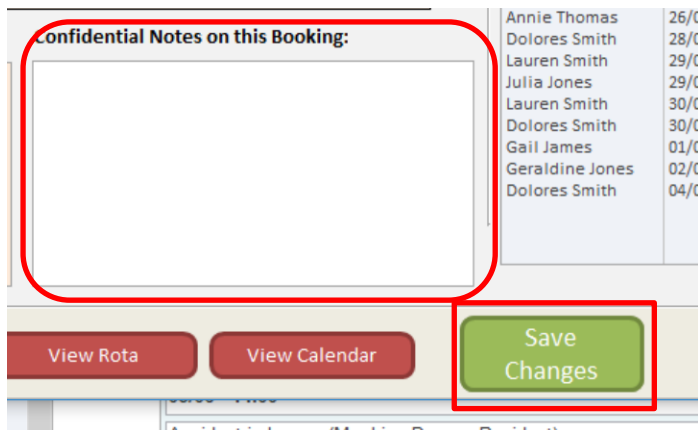
The idea of this screen is that, as a manager, you have all the information needed to be able to make a decision about whether a holiday request can be confirmed.

This is not a new screen for this release, however it has been enhanced as part of the Roster update.

Specifically: -



You can now access Historical Requests.

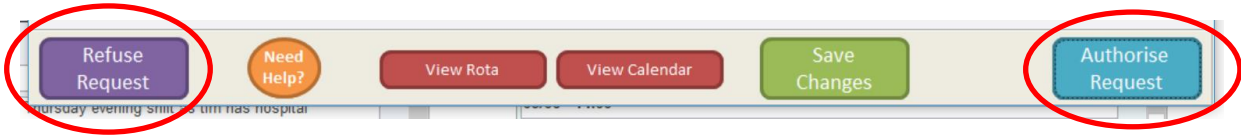


You can now add notes to the request to keep track of any conversations you may have had with the staff member.

Other Absences during this Period:

Staff Name	Start Date	End Date	Reason
Leah Hughes	19/05/2018	01/12/2019	Rota Change
Ruth James	21/06/2019	29/06/2019	Holiday
Sally Harris	23/06/2019	29/06/2019	Holiday
Michelle Jenkins	23/06/2019	31/08/2019	Unpaid Leave
Edith Jones	24/06/2019	29/06/2019	Holiday
Regina Thomas	24/06/2019	28/06/2019	Holiday
Dawn Harris	26/06/2019	02/07/2019	Sickness
Claire Thomas	26/06/2019	28/06/2019	Sickness
Annie Thomas	26/06/2019	04/07/2019	Sickness
Dolores Smith	28/06/2019	29/06/2019	Holiday
Lauren Smith	29/06/2019	29/06/2019	Holiday
Julia Jones	29/06/2019	29/06/2019	Sickness
Lauren Smith	30/06/2019	16/07/2019	Holiday
Dolores Smith	30/06/2019	30/06/2019	Holiday
Gail James	01/07/2019	03/07/2019	Holiday
Geraldine Jones	02/07/2019	05/07/2019	Holiday
Dolores Smith	04/07/2019	17/07/2019	Sickness

All absences that cross over the holiday request are shown, including sickness or unpaid leave.



In order to process the request, you must either select Refuse or Authorise.

Cancel a Holiday

You can cancel a holiday through the holiday record screen: -

Manage Your Holidays...

Year 2019 - 01/04/2019 until 31/03/2020

Active Holiday Year: Yes Locked Holiday Year: No

Carried Over: hours

Holiday Entitlement: weeks

Holiday Allowance: hours

Total Holiday for Year: hours

Holiday Taken: hours

Remaining Holiday: hours

Time Left Before Year End: days

Start	End	Hours	Cancelled
10/04/2019	11/04/2019	14.00	
12/04/2019	21/04/2019	50.00	
03/08/2019	17/08/2019	64.00	
26/10/2019	02/11/2019	36.00	

 Include Cancelled

Record: 1 of 2 No Filter Search

Staff Leaver Process

With the new Roster system you can now process a staff leaver at any time, including in the future: -



This then shows a screen like this: -

The screenshot shows the staff profile for Mrs Kim Smith. A modal dialog box titled "Enter Employee Leave Date" is open, prompting the user to "Enter the leave date for this employee. You can set a date up to 28 days in the future." The dialog has "OK" and "Cancel" buttons. The background form shows personal details like name, address, and contact information.

If you put a date in the future, the leave date will be shown on that staff record: -

The screenshot shows the same staff profile page. The "Leave Date" field at the bottom is now populated with "29/06/2019" and is highlighted with a red box. A "Cancel Leaver" button is visible next to the date field.

If you select Cancel Leaver the leave request will be cancelled.

Roster System

This update contains a significant change to the rota system. There is a great deal of new functionality contained within this update.

How Roster Works – Who & When

The Roster System works on the principle that you have a single, live rota. This rota contains a datasheet of who is working, when they are working and who they are looking after. In roster we call these areas: -

The Assignment

This is “Who is working”. In Roster this can be a Staff Role or Staff Member.

The Shift

This is the “When they are working”. In Roster this can be either a shift template or a user defined shift. The shift can optionally include a shift indicator. **Every cell in the Roster must have a shift value.**

The Allocation

This is the “Who they are looking after?”. This is optional and can be either a Care Service Group, a Rota Allocation Group or an individual Service User.

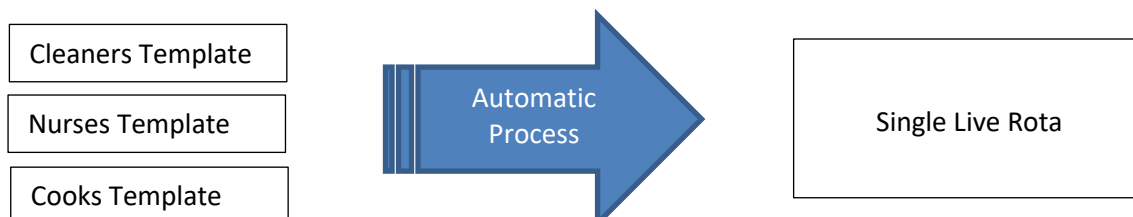
Each cell of a rota can have a Shift, Assignment and Allocation.

Using Templates

When managing a care organisation, it is important to have a clear idea about the costs of providing staff for the organisation. Within Roster you can create a Template of a rota which can be used to seed the live rota.

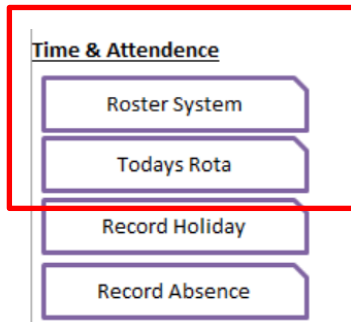
The template does not need to include actual staff names, but can instead use staff roles. We do not include in the template any absences or holidays.

The template is constructed over a set number of rota weeks. You can have any number of templates that are feeding into the live rota. For example, you could have a Cooks Template, Cleaner Template, Nurses Template.

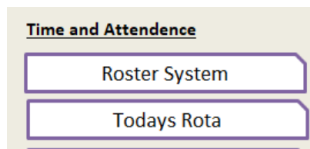


Accessing the Roster System

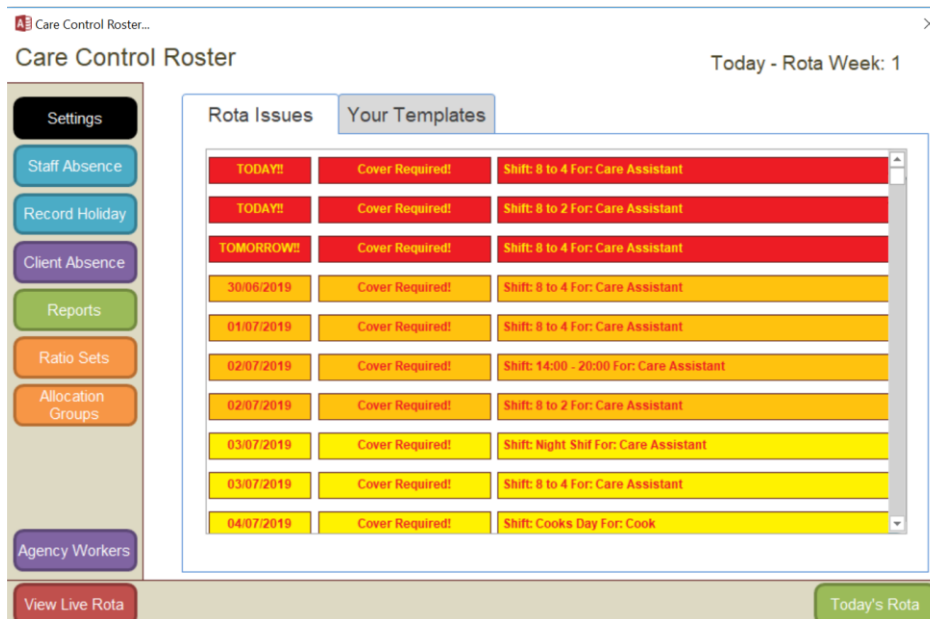
From the Admin Dashboard you can access the key features of the Roster System here: -



From the main Administration System, you select: -



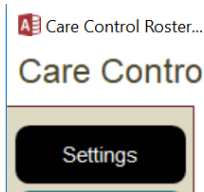
Clicking on the Roster System you will see the following screen: -



This screen displays a number of options.

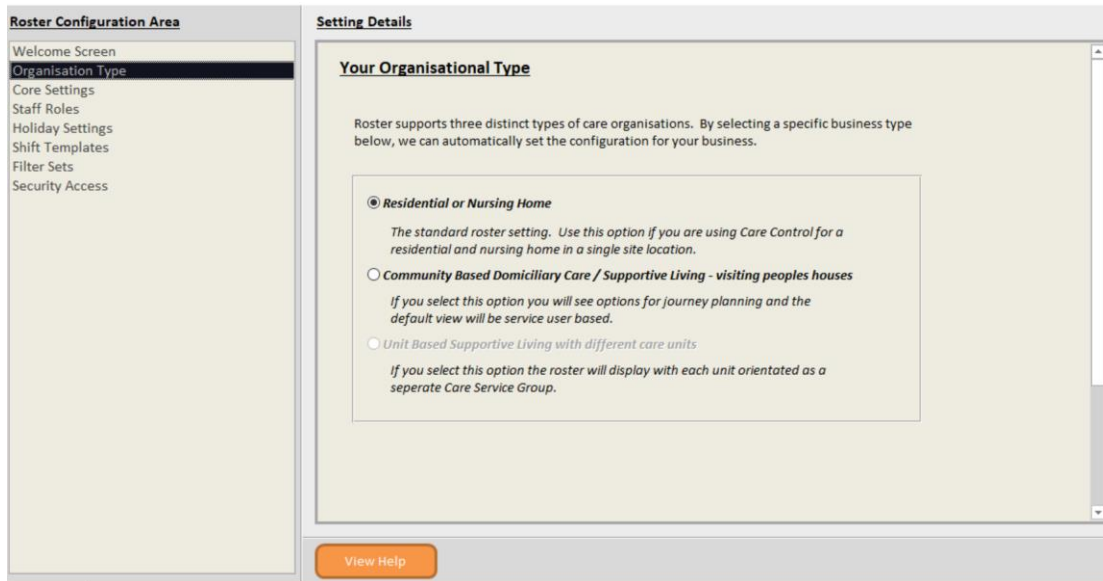
Roster Settings

The Roster Settings are accessed by this button: -



You will then see configuration options and settings relating to the Roster Module.

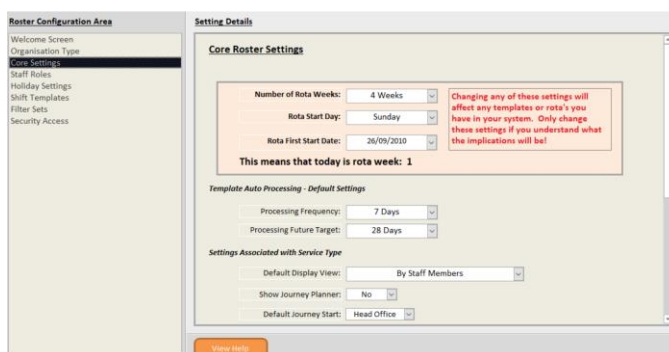
Organisation Type



The new roster system can be configured for both Domiciliary Care or Residential / Nursing Home businesses. On the Organisational Type screen, you can short cut the configuration of your roster system for the type that best matches your business.

Core Settings

The core settings options contain the following: -



Number of Rota Weeks

How many rota weeks do you want on your rota templates.

Rota Start Day

What day of the week does your rota start?

Rota First Start Date

This date defines the week 1, day 1 start date. This date is used to calculate the rota week for any given day. Make sure it is in the past.

Note – if you change any of these settings after you have started to use the rota system, you may get some unintentional results. Always check with the Care Control support desk if you plan on changing these core settings.

Template Auto Processing – Default Settings

These settings are the defaults for the processing frequency and future target days for rota templates.

Processing Frequency

How often is a rota template processed. Set in Days.

Processing Future Target

How many days in the future does the rota template get processed for? Set in Days.

Settings Associated with Service Type

These are settings that set the defaults for the service type you are operating. These are the settings that are modified when you set your organisational type.

Default Display View

This can be either By Staff Members or By Service User. Typically Care Homes and Nursing Homes show rotas By Staff Members, Domiciliary Businesses show rotas By Service User.

Show Journey Planner

This is a Yes or No value and will display the Journey Planner tool. This is typically only used for Domiciliary Businesses.

Default Journey Start

As part of the Journey Planner, you can define the default starting position. Options are: - Head Office or Home.

Default Journey End

As part of the Journey Planner, you can define the default ending position. Options are: -
Head Office or Home.

Round First Mile

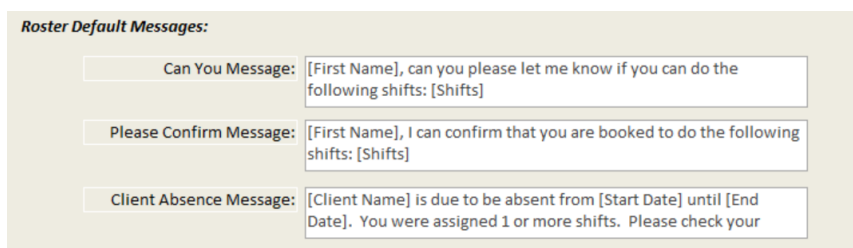
This is a Yes or No Option. If set to Yes, the first mile of the journey is always at least 1 mile.

Roster Default Messages

With the roster system you have three messages that can be used to either: -

1. ask staff if they can complete a shift,
2. confirm with a staff member that they are doing a shift,
3. send a message following a client that is going to be absent.

The next set of settings define these: -



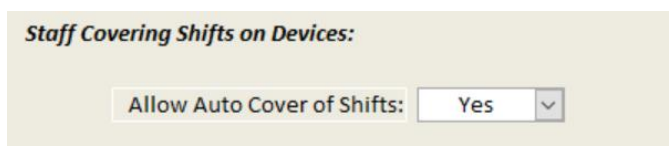
Roster Default Messages:

Can You Message:	[First Name], can you please let me know if you can do the following shifts: [Shifts]
Please Confirm Message:	[First Name], I can confirm that you are booked to do the following shifts: [Shifts]
Client Absence Message:	[Client Name] is due to be absent from [Start Date] until [End Date]. You were assigned 1 or more shifts. Please check your

Staff Covering Shifts on Devices

The final setting in the core settings is a Yes or No Setting that defines if staff are allowed to try and cover shifts on devices. As you may be aware, if staff are using Pocket or CC Mobile they will see rota and shifts that need to be covered.

If these staff have a matching role and are not working, they can automatically cover the shifts if this setting is set to Yes.



Staff Covering Shifts on Devices:

Allow Auto Cover of Shifts: Yes

Staff Roles

The staff roles area is really important as these are used by the rota system to group and order the staff when the rota is displayed. When you add a staff member with a new role, this table is automatically updated.

However, the order number is not updated and you must remember to change the order to suit your organisation.

Manage Your Roster Roles Add Role

Category	Role	Order
Cook	Cook	1
Care	Cover	2
Activities	Activities Co-Ordinator	2
Agency	Agency	2
Care	Bank Care Assistant	2
Care	Care Assistant	2
Care	Care Assistant (TP)	2
Care	Care Assistant(S)	2
Care	Care Manager	2
Domestic	Domestic	3
Domestic	Maintenance	4

If you touch a role you can update the order or role description: -

Care	Bank Care Assistant	2
Care	Care Assistant	2
Care	Care Assistant (TP)	2
Care	Care Assistant(S)	2
Care	Care Manager	2
Domestic	Domestic	3
Domestic	Maintenance	4

Category: Order Number:

Role: Delete Update

Holiday Settings

Please see above for these settings.

Shift Templates

The new rota system supports shift templates that can be used on the rota instead of rota shift values. For example, if you have a standard Cooks Day shift, this can be loaded into the system as a Shift Template. On your rota you would then see the shift Cooks Day instead of the rota value.

Note, the shift is only displayed if the rota value matches exactly. If for example you have a cook working a Cooks Day (which is 8am until 5pm) and they are late to work by 15 minutes, the shift would then read 08:15 – 17:00 as it no longer matches a Shift Template.

Shift Templates

Shift Templates are a fast way of describing your most common shifts your organisation use. They can help staff quickly understand what a shift is, instead of trying to read a rota shift value.

Shift Name	Short Name	Shift Value	No. Hours	Created By
Night Shift	Night Shift	22:00 - 08:00N	10	Johny Atlas (20/06 - 14:13)
2 to 10	2 to 10	14:00 - 22:00	8	Johny Atlas (20/06 - 14:13)
4 to 10	4 to 10	16:00 - 22:00	6	Johny Atlas (20/06 - 14:13)
6 to 10	6 to 10	18:00 - 22:00	4	Johny Atlas (20/06 - 14:13)
8 to 12	8 to 12	08:00 - 12:00	4	Johny Atlas (20/06 - 14:13)
8 to 2	8 to 2	08:00 - 14:00	6	Johny Atlas (20/06 - 14:13)
8 to 4	8 to 4	08:00 - 16:00	8	Johny Atlas (20/06 - 14:13)
8 to 6	8 to 6	08:00 - 18:00	10	Johny Atlas (20/06 - 14:13)
Cooks Day	Cooks Day	08:00 - 17:00	9	Johny Atlas (20/06 - 14:13)

Deactivate Add New...

You cannot delete a shift template once they have been created so be careful that you enter the text in correctly.

You can deactivate them so they no longer appear to be selected.

When you add a Shift Template you will see the following screen: -

The Shift Name is a full description that will appear in select lists.

The Short Name is what is displayed on the rota.

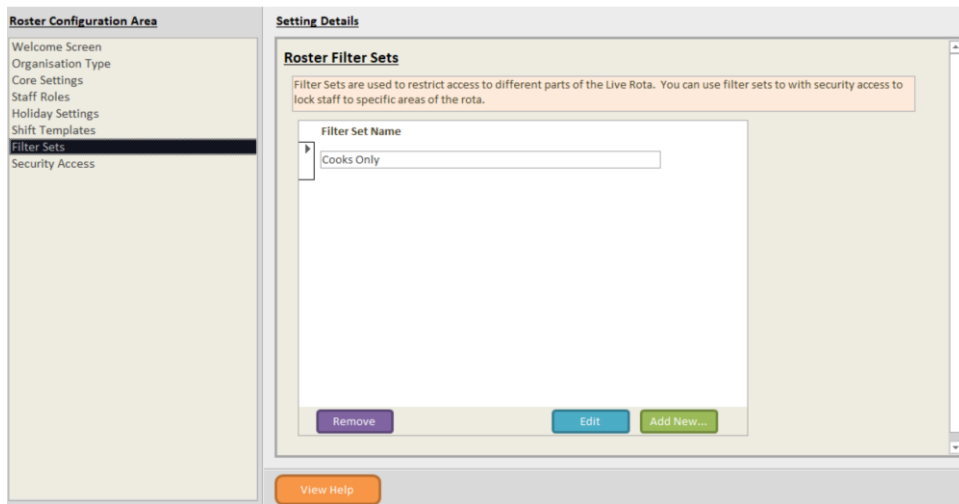
The shift value is the actual shift.

The shift indicator can be used for any payroll treatment for this shift.

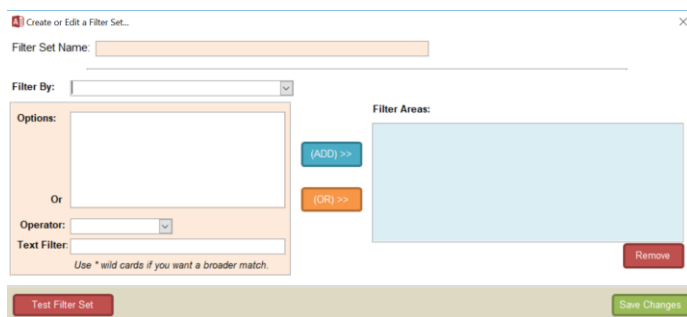
In this example we have a new shift called In Day which is 8am until 4pm with an In Charge Rate shift indicator.

Filter Sets

Filter Sets allows you to create filter groups that can be used by staff to either quickly filter the view of the rota or, through security, force staff to work only within a set group of either staff or service users.

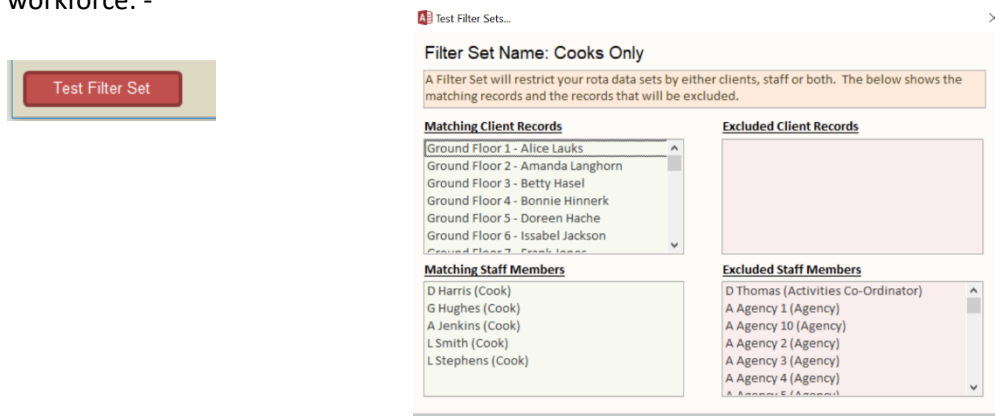


You can create a filter set by clicking on Add New: -



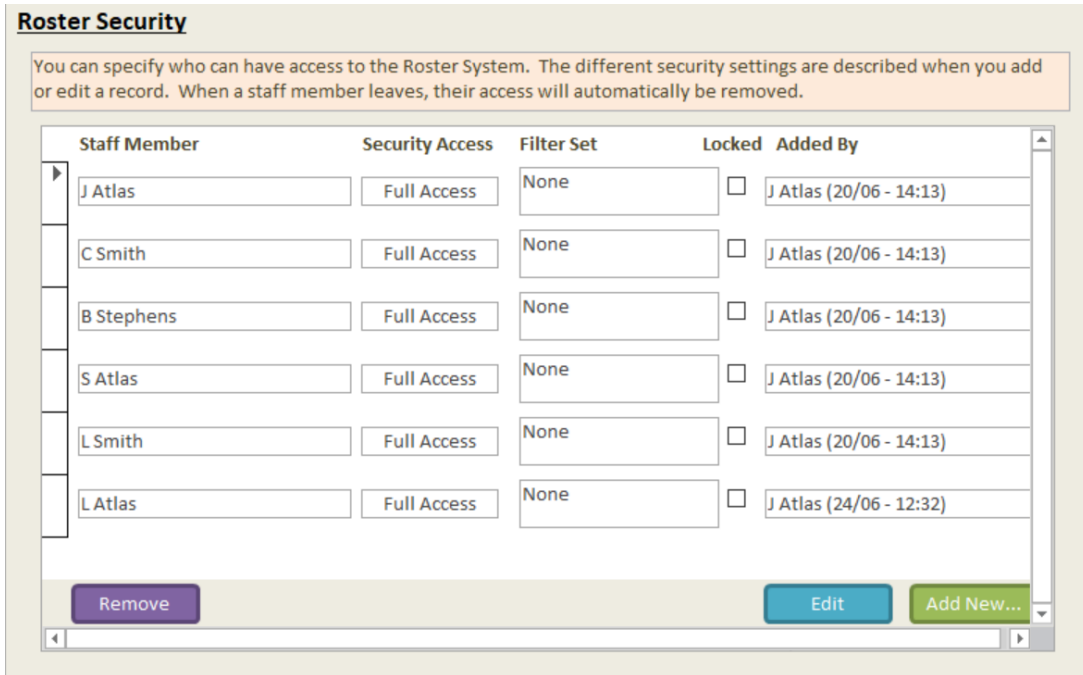
Here you can construct a filter by either selecting areas to include or by using wild card searches to include or exclude groups of staff.

Once you save your filter set you can test it to see what the results would be on your current workforce: -



Security Access

The final area that you can control in the Roster Settings is security access: -



In order to access the Roster Settings you need to have security access set-up. You can add staff in this area with the following security access: -

Security Level	Areas Allowed to Access
Full Access	Access to all areas including settings, security and filter sets.
Full Administrator	Change all data set, you just can't change any settings.
Template Administrator	Change all template data, including processes templates. Also Rota Admin!
Rota Administrator	You can't amend or edit Templates, but you can do everything with Rotas.
Rotas Only	Access to the rota to add, amend or remove shifts. Some bulk operations are switched off.
Simple	Easy access on CC Mobile and Windows to adjust shifts if needed. Great for senior team members.

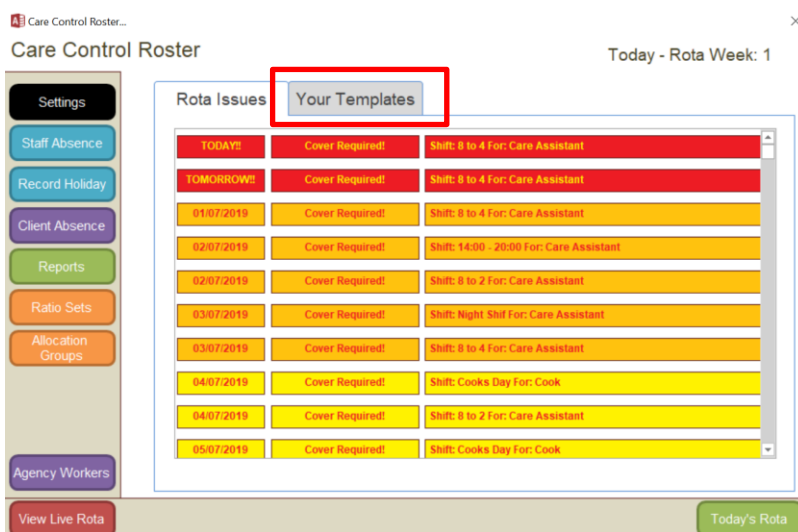
Roster Templates

The new roster system has a structure called a Template. The idea of a template is to allow you to structure the shifts you need against the roles in your organisation. Once created you can process the template into your live rota.

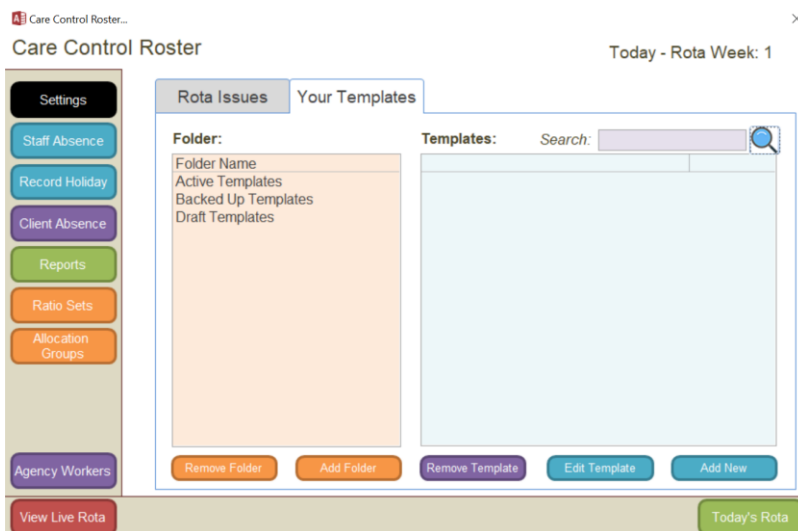
You can have as many templates as you want. You can set a template to auto process details into your live rota.

Working with Templates

Access templates here on the Roster System: -



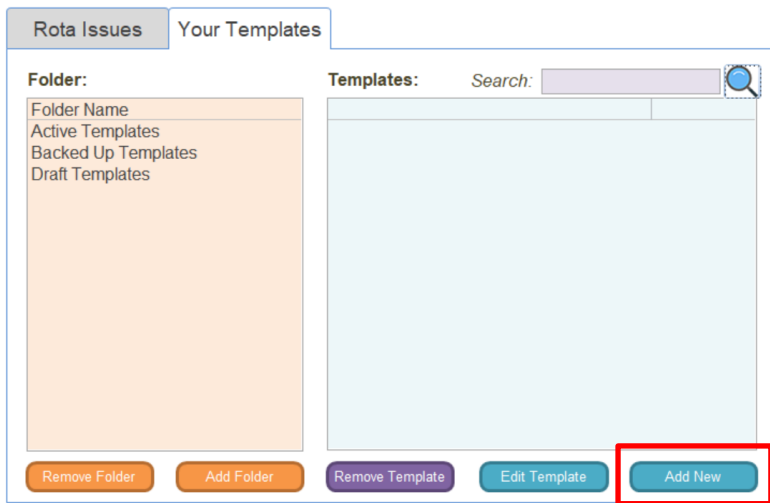
This will display the template screen: -



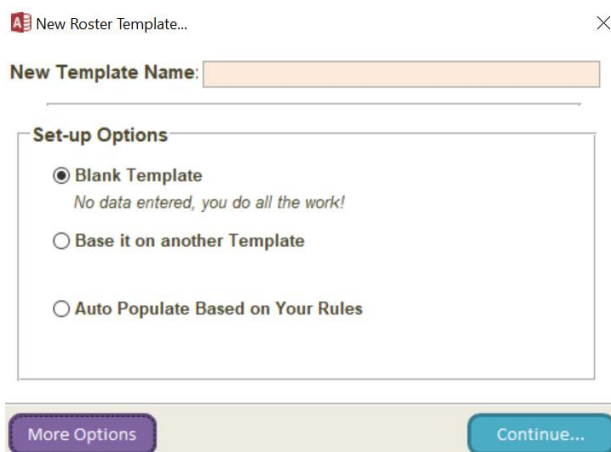
You can organise templates into folders to try and keep track of the templates you create.

Adding a Template

To add a template you need to click on the Add New button: -



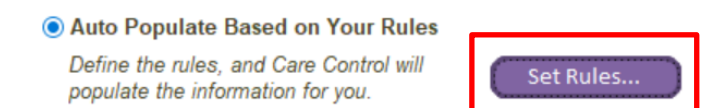
This shows the add new template screen: -



You need to enter a Template Name. You can either: -

1. Create a Blank Template – you have to fill it all out yourself!
2. Base the template on another template. Select this option and you can select a template of from the list.
3. Auto populate based on your Rules.

If you select option 3 you will see the following screen: -



Set Population Rules

If you have selected option 3 you can set the population rules: -

You can either use a previously saved Ratio Set, or you can enter the details directly into this screen.

For example, if for your template each week you want to have a cook each day, a senior carer, and 5 care assistants you would enter the following: -

Role	Weekday	Shift	Number
Cook	(All Days)	Cooks Day	1
Care Manager	(All Days)	8 to 6	1
Care Assistant	(All Days)	8 to 4	5
	(All Days)		0

You can now save this as a Ratio Set if you like or just click continue: -

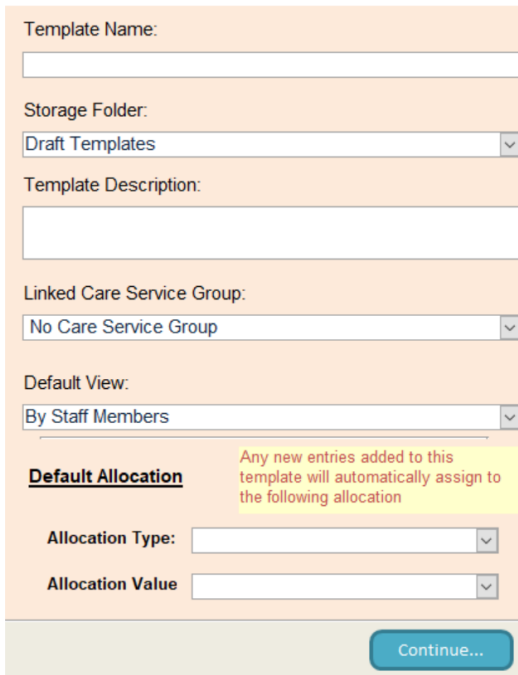
If you have saved a ratio set you will see a green tick on the create template screen: -

Auto Populate Based on Your Rules
Define the rules, and Care Control will populate the information for you.

Set Rules...

More Options

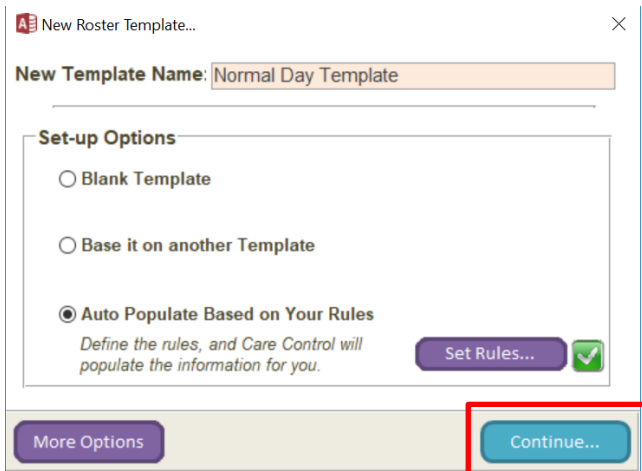
Before you create your template there are further options you can set: -



On this screen you can define further settings for your template, including a default allocation.

By defining a default allocation, each shift that is added to your template will have that allocation.

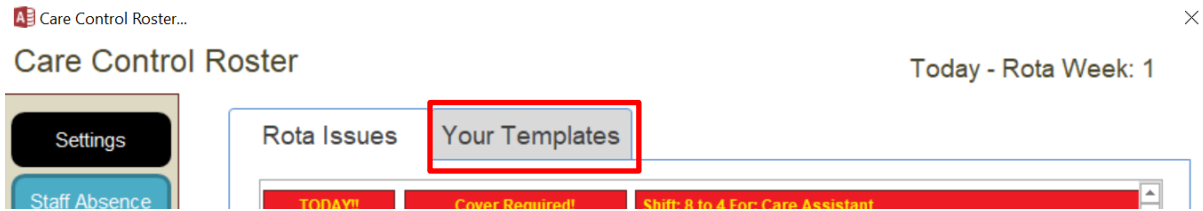
For example, if you are creating a template for a specific service user you can define this value here.



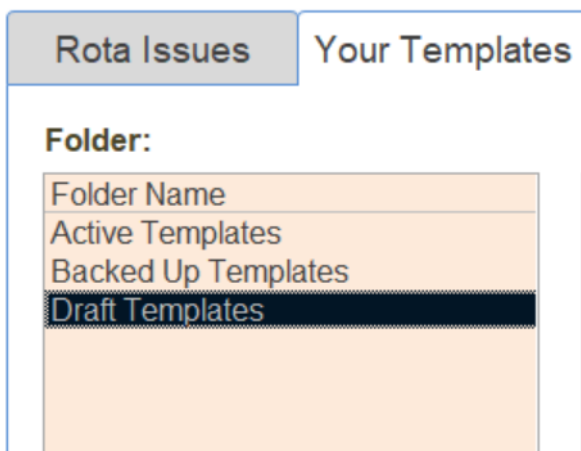
As long as you have entered a template name you can select Continue to create your template.

Loading Your Template

If you have added a template this will load automatically for you. To load a previously created template you need to: -



Select a folder: -

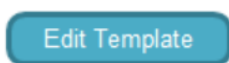


Select a template from the list: -

Templates: Search:

Name	Active
July 19	No
Normal Day Template	No
Testing 1234	No

You can either double click the entry or select Edit Template.



Working with a Template

Once your template has loaded it will be displayed as below: -

The screenshot shows the 'Roster Template' interface. At the top, the 'Template Name' is 'Normal Day Template' and 'Auto Process' is 'Off'. The 'Change View' dropdown is set to 'By Staff Members'. The main area is a grid for 'Week No: 1' with columns for Sunday through Saturday. The grid is organized into sections: 'Roles for: Cook' (Cooks Day), 'Roles for: Care Assistant' (8 to 4), and 'Roles for: Care Manager' (8 to 6). A sidebar on the right titled 'Your Template Statistics' provides a summary of hours.

Total Hours by Category		Value
Care		1400.00
Cook		252.00
Total Hours by Week		Value
Week 1		413.00
Week 2		413.00
Week 3		413.00
Week 4		413.00
Total Hours by Role		Value
Care Assistant		1120.00
Care Manager		280.00
Cook		252.00
Hours by Week, by Category		
Week 1	Care	350.00
Week 1	Cook	63.00
Week 2	Care	350.00
Week 2	Cook	63.00
Week 3	Care	350.00
Week 3	Cook	63.00
Week 4	Care	350.00
Week 4	Cook	63.00
Hours by Week, by Role		
Week 1	Care Assistant	280.00
Week 1	Care Manager	70.00
Week 1	Cook	63.00
Week 2	Care Assistant	280.00

On this screen you have a number of areas of functionality: -

Navigating to Different Weeks

You can move to the different weeks in your template through these buttons: -

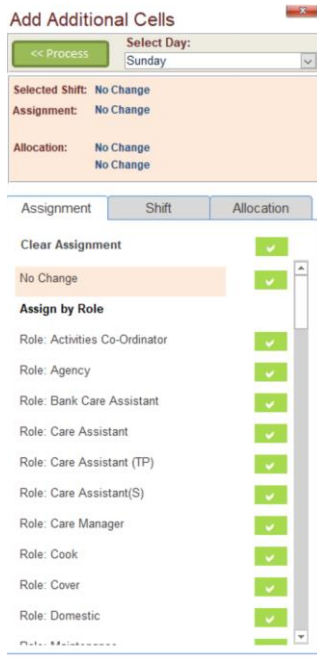


Adding a Cell

You can add a cell to any day by clicking on the following: -



Once you select this option the Smart Board will load on the right-hand side: -



The smart board allows you to: -

Set the Assignment

The Assignment is a Role or Staff Member.

Set the Shift

This can be a shift template or a user defined shift.

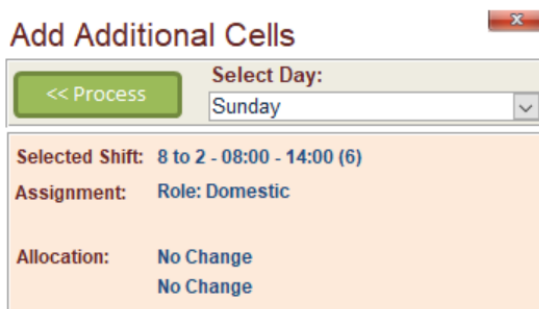
Set the Allocation

The Allocation is either a Care Service Group, Rota Allocation Group or Service User.

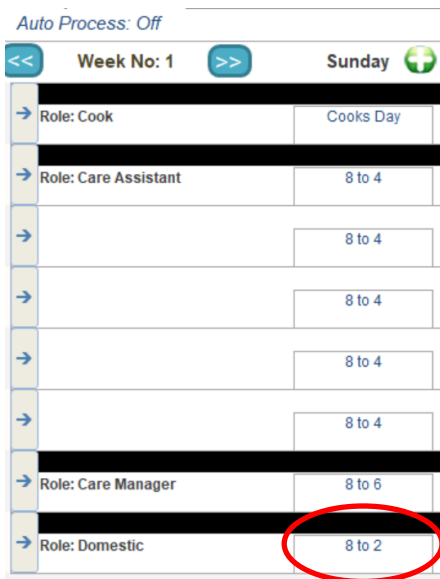
The minimum you must select is a Shift.

To select a value you need to select the Green Tick against the entry.

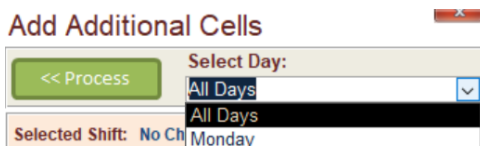
In the below example we are adding a new cell to a Sunday for the Domestic Role for a shift of 8 to 2: -



Once you select Process the cell will be added: -

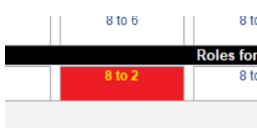


When you add a cell you can also select All Days from the list to add the shift to every day on the template:-



Selecting a Cell

Any of the cells in the template can be selected. Just click on the cell and it will be highlighted in a red square and in yellow: -



On the right the Smart Board will be loaded to allow you to modify the cell contents.

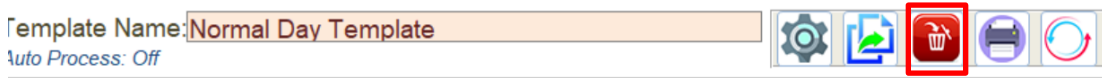
You can select multiple cells at a time by simply clicking a different cell.



If you have multiple cells selected, any values you select in the Smart Board will be processed against the selected cells.

Deleting Cells

You can delete a cell by making sure it is selected and selecting the Delete Icon: -



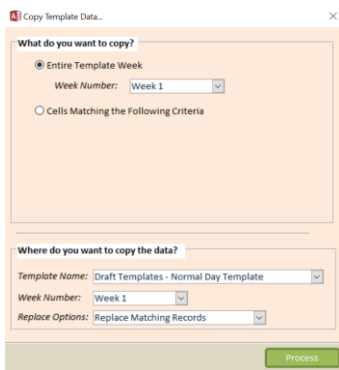
If you delete the cells it will remove these cells from the template, permanently.

Copying Template Data

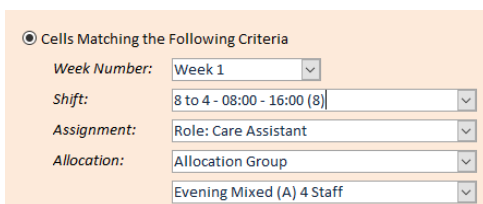
You can copy template data between weeks or between template: -



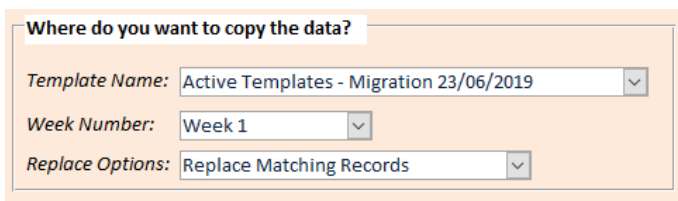
This opens the following screen: -



With this screen you either copy an entire week or you select cells matching your criteria: -



You can then decide which area you want to copy this data into: -



The replace options are: -

Replace Everything

This will remove all data for that week and replace it with data from the copy options.

Replace Matching Records

This will look at records in the template week that match the selection criteria from the copy options.

Add Records Only

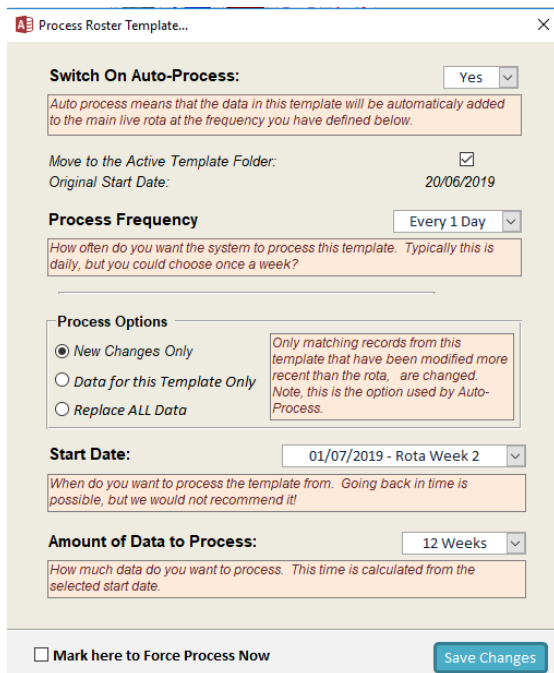
No records are deleted. Records are only added.

Processing a Template

When you have constructed your template, you can process the details into the live rota: -



This will display the following screen: -



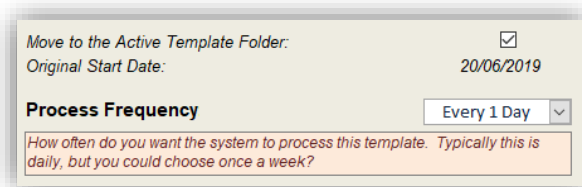
From this screen you can “Process” your template into your live rota.

Processing Options

There are a number of options associated with processing a template into your live rota: -

Switch on Auto-Process

If you select Yes, this will switch on the process of a template automatically at the frequency of the details shown below.



Move to the Active Template Folder:

Original Start Date: 20/06/2019

Process Frequency: Every 1 Day

How often do you want the system to process this template. Typically this is daily, but you could choose once a week?

Move to the Active Template Folder

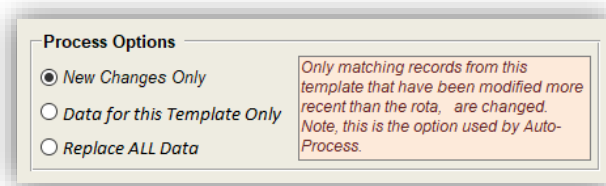
If you have configured this template to auto process, we advise that you move this template to your active folder.

Process Frequency

How often do you want to process this template into the live rota. If it is set to every day, the template will add information into your live rota daily.

Processing Options

There are three options to define what data you want to process: -



Process Options

New Changes Only

Data for this Template Only

Replace ALL Data

Only matching records from this template that have been modified more recent than the rota, are changed. Note, this is the option used by Auto-Process.

New Changes Only

Only new records that have a date greater than the entry stored in the rota are added. This is the default option for the auto process. New records include records that are not there on the live rota.

Data for this Template Only

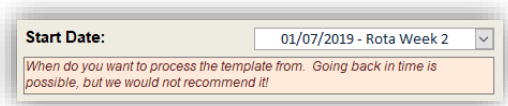
With this process option, data that has originated from this template will be removed from the live rota. This includes any data that may have been subsequently updated on the live rota after the original templated record was inserted.

Replace ALL Data

This option will remove all data from the start date (see below) within the live rota and insert the data from this template only.

Start Date

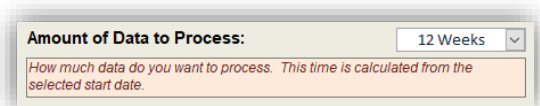
The date that you want the data to be processed from: -



This date corresponds to the date on the live rota that you want the data to be processed from. It also relates to the template week that will be used as the start of the process.

Amount of Data to Process

This defines how much data you want to process: -



You can select between 1 day and 12 weeks of data to process into the live rota.

How Auto-Process Works

As an example, if we have a template that we are going to process into the live rota each day, for 12 weeks, new data only, this is the process that will occur: -

Day 1 – 12 Weeks of Data Processed

On the first day the system will process 12 weeks of data into the live rota. The live rota has no data present so all data within the template is “new data”.

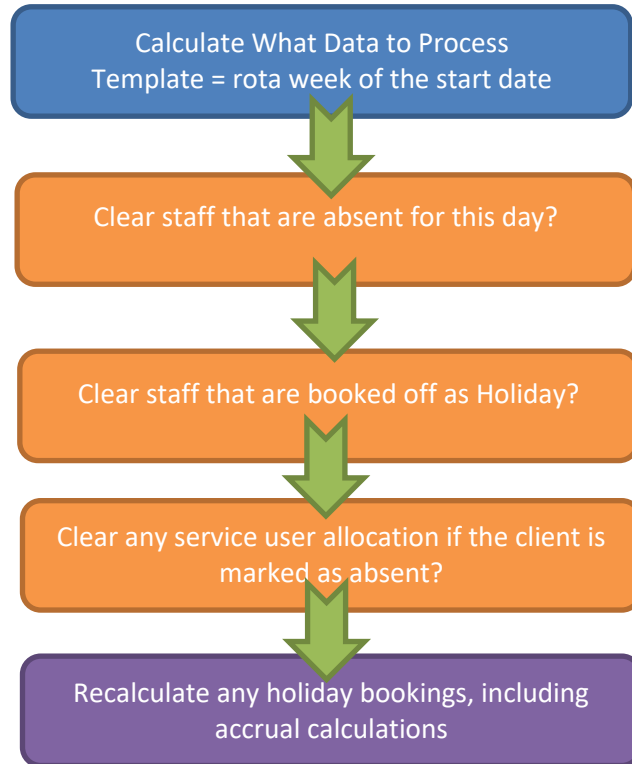
Day 2 – 1 Day is processed

As the system has already processed templated data, unless the templated data has changed, the system will only process 1 day of data which will be appended onto the end of the 12 week period. This will grow the live rota by 1 day.

This process will continue until the auto-process routine is switched off.

Template to Live Rota – Processing Steps

The moving of a template into the live rota completes a number of steps. The following workflow has been created to try and help explain what could happen to your data as it moves from a template into the live rota: -

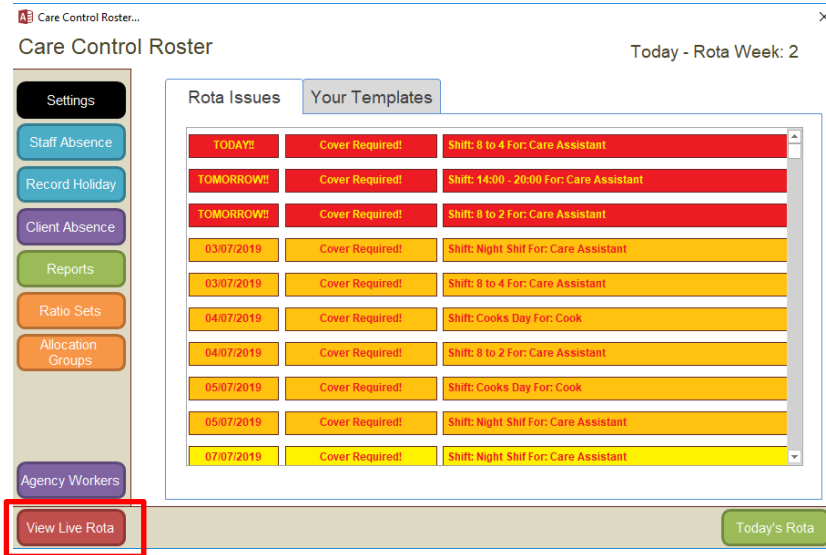


The Live Rota

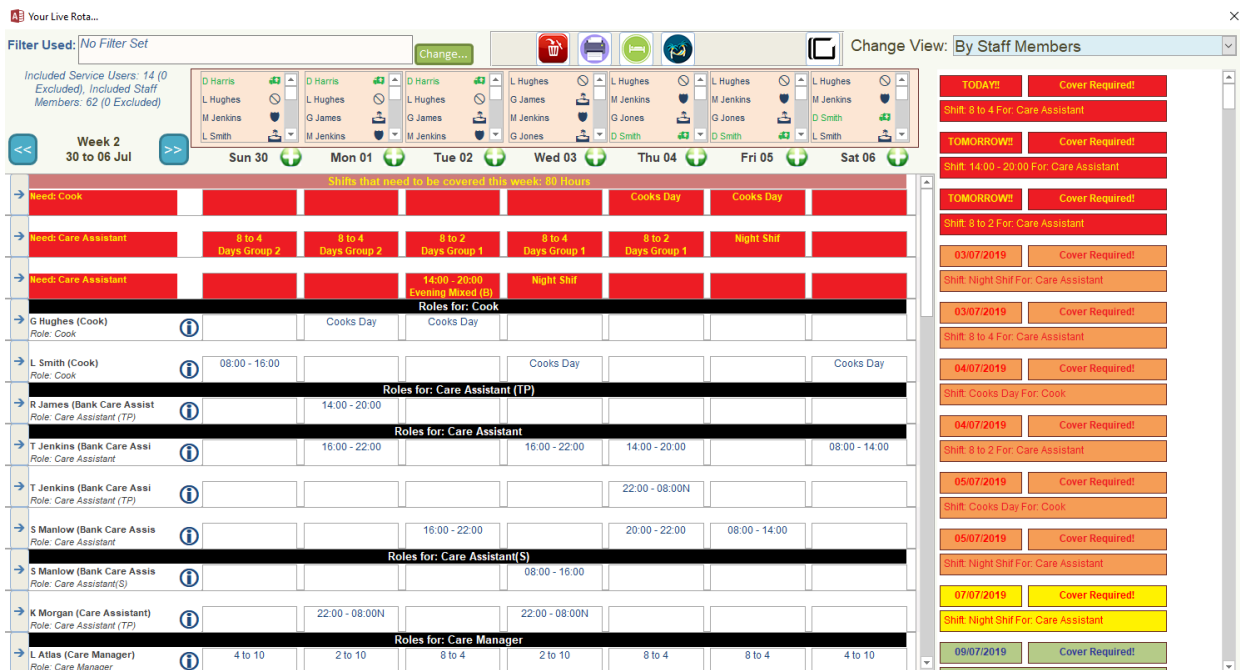
Within Care Control Roster you have a single live rota. This is populated either via templates being processed into it, or directly through the various population tools that come with the system.

Accessing the Week View

You can access the weekly view of the live rota here: -



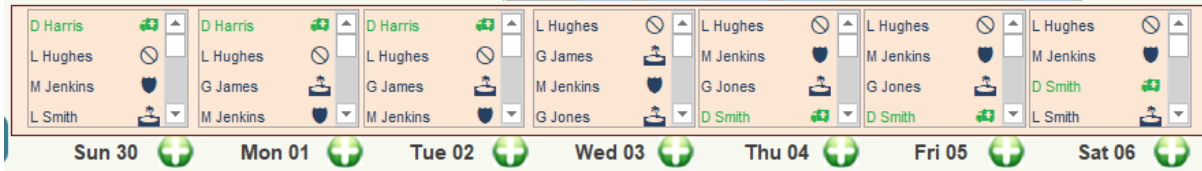
This will load the live rota for the week that contains today's date: -



There are a number of key differences between the live rota and the template view.

Absence Bar

The absence bar is shown at the top of the screen. All staff that that are marked as absent (on holiday, sickness, training or any other type of absence) are shown here: -

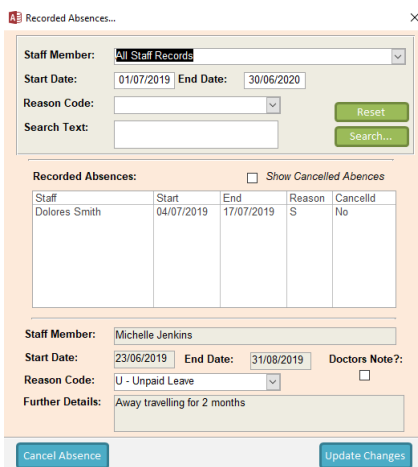


Each Absence Table relates to the day of the week.

The icons shown against the staff members' names provide some indication as to the absence reason. The possible absences and their absence icons are shown below: -

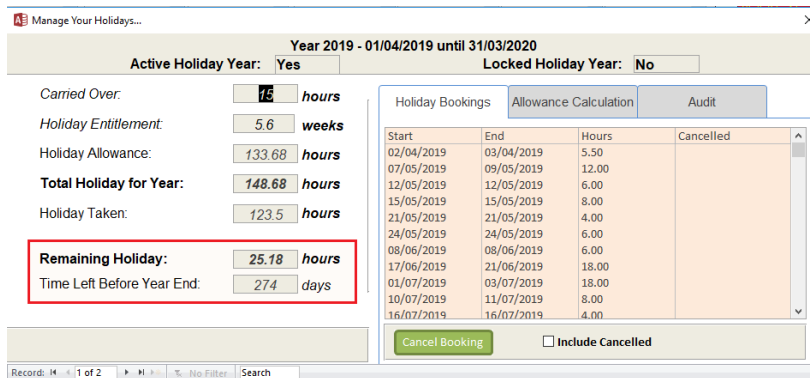
Reason	Icon
Comp Leave	
Holiday Absence	
Maternity	
Paid Holiday	
Paternity	
Rota Change	
Sickness	
Swapped	
Training	
Unpaid Leave	

If you have an entry on the absence bar you can view or edit this entry by simply clicking on it. For all entries other than Paid Holiday you will see the absence history screen: -



Here you can Cancel or Update the Absence Record.

If you click on a Paid Holiday absence you will also see the Holiday Booking Screen: -



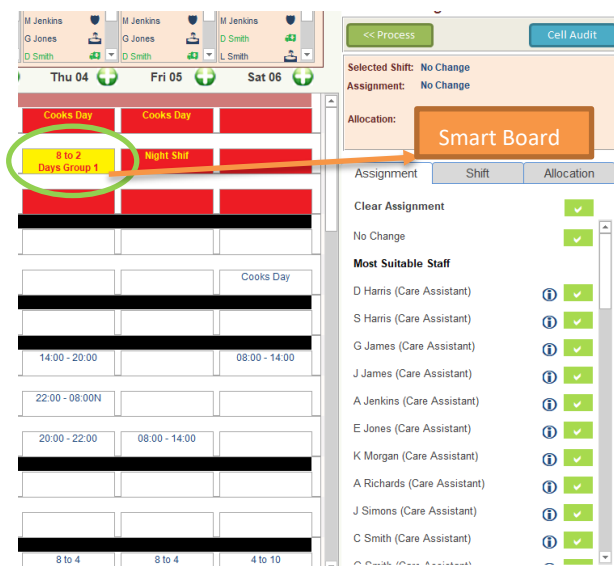
Issues Area

On the Week Rota View we display any issues that need to be resolved at the top of the rota: -



This can include Shifts that do not have a staff member assigned or, when looking at the data in Service Member View, issues can include shifts that have not been allocated to a service user.

Clicking on an issue cell (a cell in yellow with a red background) the Smart Board is loaded: -



The Smart Board is a screen that allows you to set the assignment, shift and allocation.

The Assignment screen presents the most suitable staff for the shift you are trying to cover.

If you select the Information Icon next to the staff member's name you can use the system to send a message to that staff member:

Staff Information...
✕

Jamie James

Role: Care Assistant
Category: Care
1st Tel No: 01822 738100
2nd Tel No:
3rd Tel No:
Email:

Roster Settings

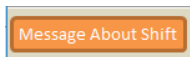
Display Order: 10 Other Staff Position:

Exclusion Rules: Amend...

Notes:

Message About Shift
Save Changes

From the information window for the staff member you can send a message to the staff member about this shift: -



This then presents an option to select a message type to send to the staff member: -

Select Message Type...
✕

Continue...

Can You

Please Confirm

If you select the Can You message, it uses a message template as defined in the Roster Settings to create a custom message to send to the staff member in question: -

Create an Alert / Message for Staff
✕

Check this box to create a Public Message

Available Staff / Message Groups:

<< All Staff >>

- Lorna Atlas
- Laura Atlas
- Johny Atlas
- Stacy Atlas
- Victoria Atlas
- Sally Harris
- Dawn Harris
- Leah Hughes
- Joan James

Staff to send Message To:

Jamie James

Your Message: 85 characters

Jamie, can you please let me know if you can do the following shifts: 04/07 - 8 to 2

Include Message in Handover Notes: Check Spelling

When for?: 01/07/2019 until 15/07/2019 How important?: For Information

Send Immediately as SMS to all Mobile Numbers of Selected Staff - Messages Cost 5p per Message

SMS Credits Remaining: 1025
Top Up!
Cancel
Send

To update any of the values you need to select the white tick in the green surround: -



This will then update the top part of the Smart Board: -

Selected Shift: No Change

Assignment: J James (Care Assistant)
Contract Hours: 20 | Assigned Hours: 30

Allocation: No Change
No Change

Once you have defined the changes you want to make to the cell, you simply select the Process option to update your cell value: -

Alter Existing Hk

<< Process

Live Active Area

The live active area is the shifts and assignment with a white background: -

Roles for: Cook							
→ G Hughes (Cook) Role: Cook	ⓘ		Cooks Day		Cooks Day		
→ L Smith (Cook) Role: Cook	ⓘ	08:00 - 16:00			Cooks Day		Cooks Day
Roles for: Care Assistant (TP)							
→ R James (Bank Care Assist) Role: Care Assistant (TP)	ⓘ		14:00 - 20:00				
Roles for: Care Assistant							
→ T Jenkins (Bank Care Assi) Role: Care Assistant	ⓘ		16:00 - 22:00		16:00 - 22:00	14:00 - 20:00	08:00 - 14:00
→ T Jenkins (Bank Care Assi) Role: Care Assistant (TP)	ⓘ					22:00 - 08:00N	
→ S Manlow (Bank Care Assis) Role: Care Assistant	ⓘ		16:00 - 22:00		20:00 - 22:00	08:00 - 14:00	
Roles for: Care Assistant(S)							
→ S Manlow (Bank Care Assis) Role: Care Assistant(S)	ⓘ				08:00 - 16:00		
→ K Morgan (Care Assistant) Role: Care Assistant (TP)	ⓘ		22:00 - 08:00N		22:00 - 08:00N		

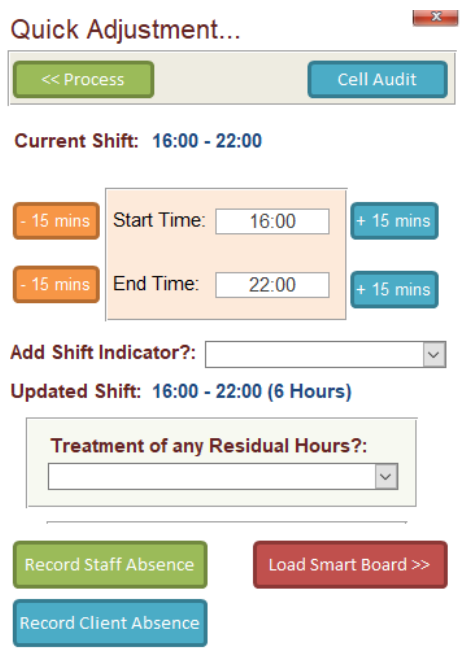
You can select any of these cells. If you select a cell with a shift value then this is the same as editing that cell: -



As with the template view, you can select multiple cells at a time if you check the multi-select icon in the top bar: -

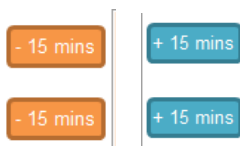


When you select an already existing cell, you are shown the Quick Adjustment Screen: -

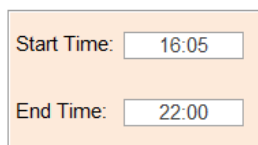


Using this screen you can make a quick adjustment to the select shift. You cannot change the assignment or allocation on this screen, but you can change the shift.

To quickly adjust the shift by adding or removing 15 minutes simply click these buttons: -



Or you can directly change the start time or end time by just typing in the fields directly: -



If you want to add a shift indicator to the shift you can do at this point.

If you have changed the hours and reduced the number of hours from the original value (either by shortening the start or end time (or both) you need to decide what you are going to do with the residual hours: -



What are the residual hours?

An example of residual hours is as follows: -

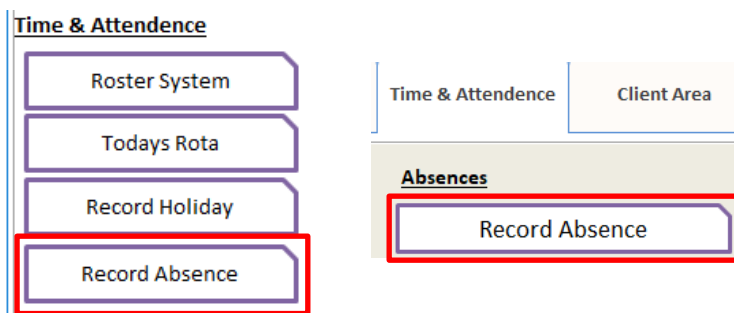
- Starting Shift:** 08:00 – 16:00
- Changed Shift:** 08:30 – 14:00
- Residual Hours:**
 - Shift 1: 08:00 – 08:30
 - Shift 2: 14:00 – 16:00

If you select Lose Residual Hours these hours will not be shown for cover.

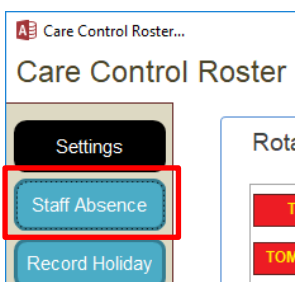
Recording a Staff Absence

There are a number of ways you can start the process of recording an absence: -

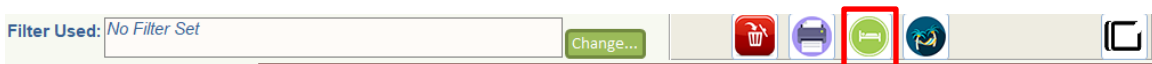
Option 1 – From Administration Centre / Administration Main



Option 2 – Roster Main Screen



Option 3 – Roster Toolbar



Option 4 – Quick Adjustment Screen

If you select an active rota cell you can select the Record Absence in the Quick Adjustment Screen: -

Quick Adjustment...

<< Process Cell Audit

Current Shift: 08:00 - 17:00

- 15 mins Start Time: 08:00 + 15 mins

- 15 mins End Time: 17:00 + 15 mins

Add Shift Indicator?:

Updated Shift: 08:00 - 17:00 (9 Hours)

Treatment of any Residual Hours?:

Record Staff Absence Load Smart Board >>

Record Client Absence

Staff Absence Screen

The absence screen allows you to select a staff member, select a start date, length of absence and absence reason: -

Record Staff Member Absence...

Record a Staff Absence Note, this form is NOT to be used for Staff Holidays.

Staff Member:

Start Date:

No. Days: Return Date:

Reason Code:

Further Details:

Doctors Note?:

Affected Shifts (Optional: Record cover now if you know about it)

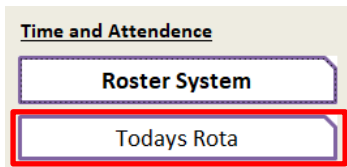
ShiftDate	Hours	Allocation	Covered By
03/07/2019	9.0	No Allocation	<input type="text"/>

Book Staff Holiday Process Absence

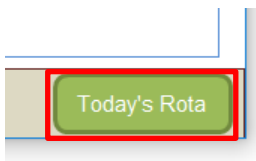
If you know who will be doing the shifts affected by the absence, you can enter these details at this point.

Rota Day View

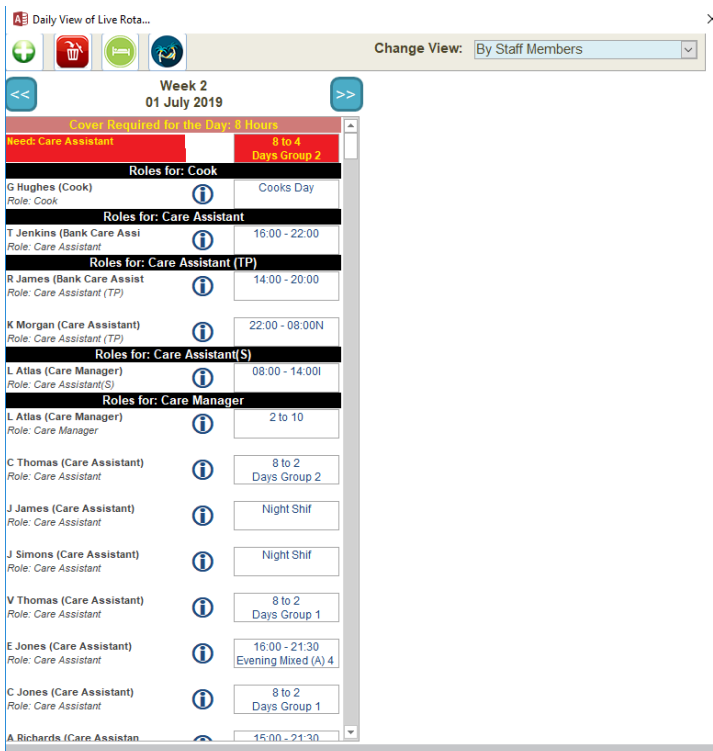
You can also see the rota in a day view. You can access the day view in the following way: -



Or



When you click one of these options you will see the day view screen: -

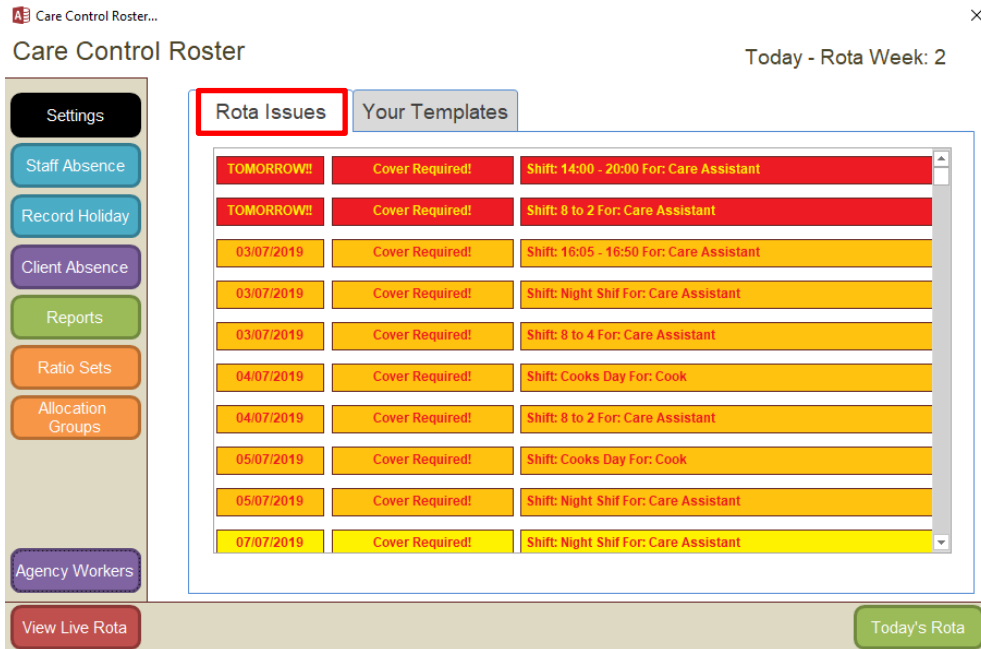


You have the same functionality on the day view screen as you do the week view screen.

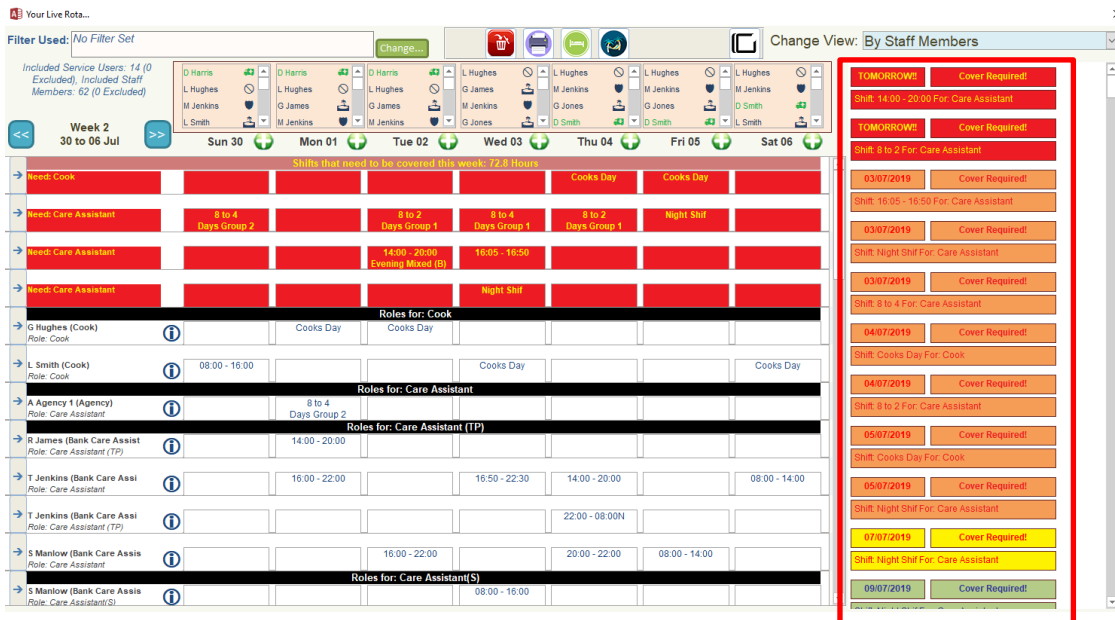
Rota Issues

Rota issues are displayed on the system to identify shifts that need to be assigned or agency records that need to be updated.

The rota issues are displayed on the Roster Main Screen: -



If you click on a Rota Issue it will load the rota day for that issue. You can also see the Rota Issues on the Live Rota Screen: -



If you click on these issues the system will navigate to the day of that issue.

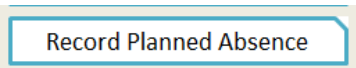
Client Absences

On the Roster System you can now record a client absence. This is useful for domiciliary care agencies who have clients who may need to stop using the organisation for a short period of time.

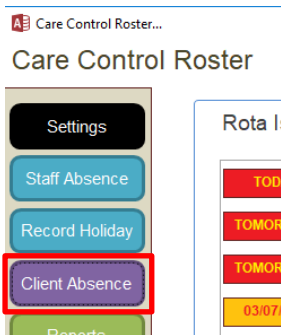
When you record a client absence the system will update the roster system and notify staff who are allocated to that client.

You can record a client absence in the following ways: -

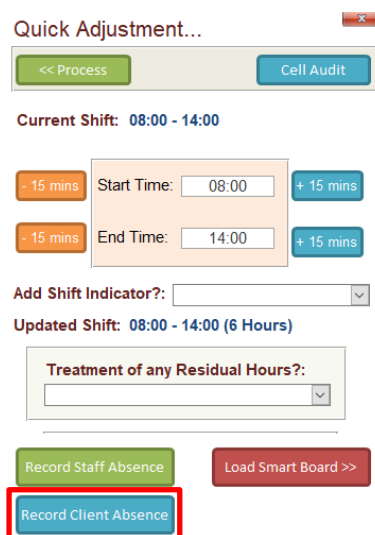
Option 1 – From Admin Centre



Option 2 – From Roster Main Screen



Option 3 – From Quick Adjust Screen



If you select one of these options, you will see the client absence screen: -

You can now select the client from the list, enter the absence dates, add any note that you want to be recorded on the client’s care plan and process the absence.

If you select the option: -

Send message to affected staff

Any staff assigned shifts that are also allocated to the client in question during the period of absence will receive a message of the planned absence and their names will be removed from the rota assignment.

Agency Workers

With this new version of roster we have included specific support for agency workers. You can assign a shift with an agency record: -

When you process this record through you will see this on your live rota: -

Roles for: Care Assistant	
→ A Agency 1 (Agency) Role: Care Assistant	8 to 4 Days Group 2

However, you will also see the agency record shown on your issues to resolve: -

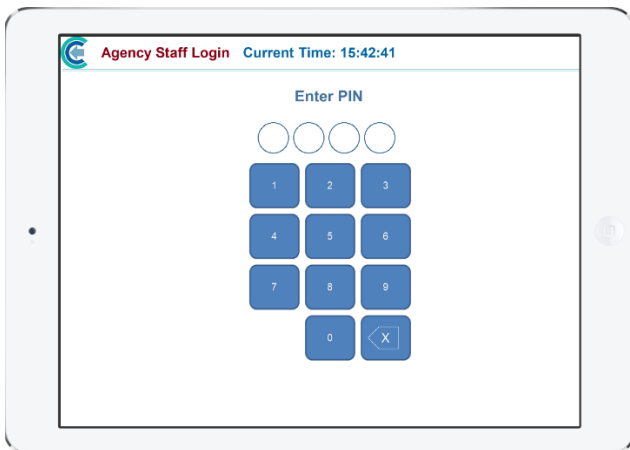
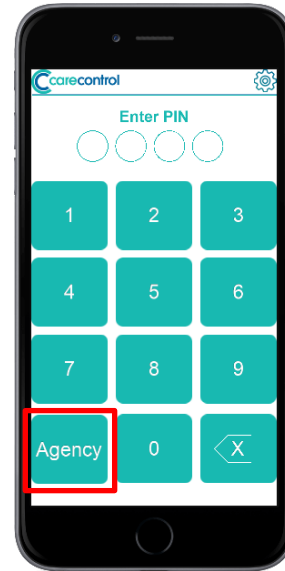
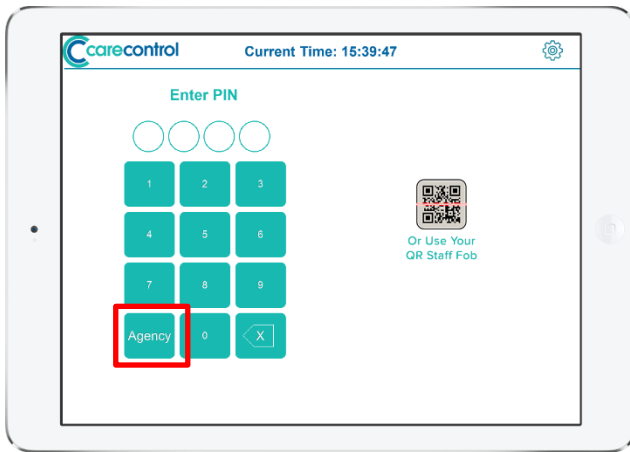
When you click on this issue record you will see the following screen: -

You need to complete the screen so that a temporary pin number can be generated for the agency staff member: -

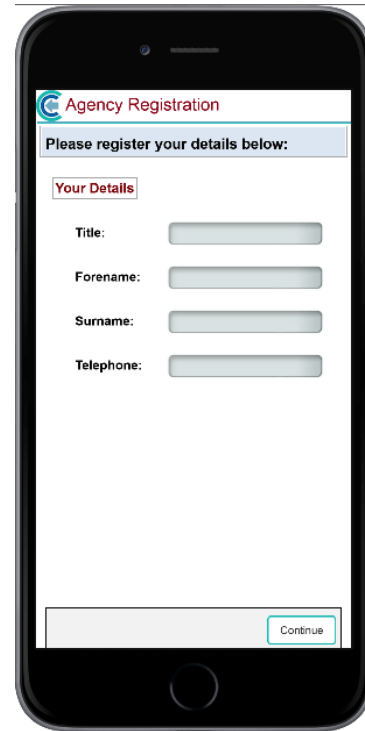
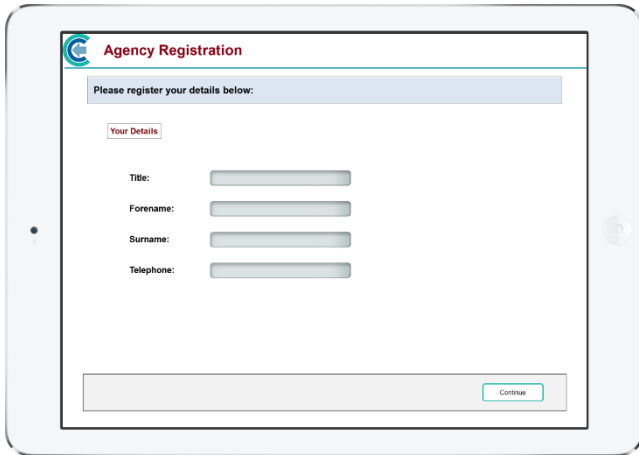
In this example we have selected the agency that we have contacted. We have selected the security level and saved the changes. This has created a pin number of 3151. At this stage you can print a user guide for the agency worker.

Agency Worker Usage

When the agency worker uses either CC Mobile or CC Pocket they will see an Agency Worker button: -



Enter the agency pin number.

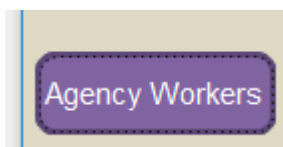


On first use, the agency worker must register their name and telephone number.

They can then sign in using their pin number during the shift.

Viewing Agency Worker Records

You can access the agency work records through the Roster Home Screen: -



This will show the agency records created to date, the registration details and information about usage: -

Working with Agency Workers...

Working with Care Agencies

Issues To Resolve | Agency Usage | Care Agencies

Shift Details:	21/06/2019	14:15 - 22:00 (7.8)	Not Registered
Agency:	AGENCY Dev	Working As:	A Agency 1
Staff Name:			View Record
Shift Details:	22/06/2019	14:00 - 22:00 (8)	Deactivated
Agency:	AGENCY Dev	Working As:	A Agency 1
Staff Name:	J Murphy	07772902966	View Record
Shift Details:	22/06/2019	14:00 - 22:00 (8)	Not Registered

Journey Planner

If you have the roster setting to display the journey planner tool, you will see a button on the Quick Adjustment Screen: -

If you have staff members allocated to service users, clicking on this button will display a journey plan for the day with the mileage and estimated travel time: -

You can also produce a monthly journey planner report through the Reports Screen: -

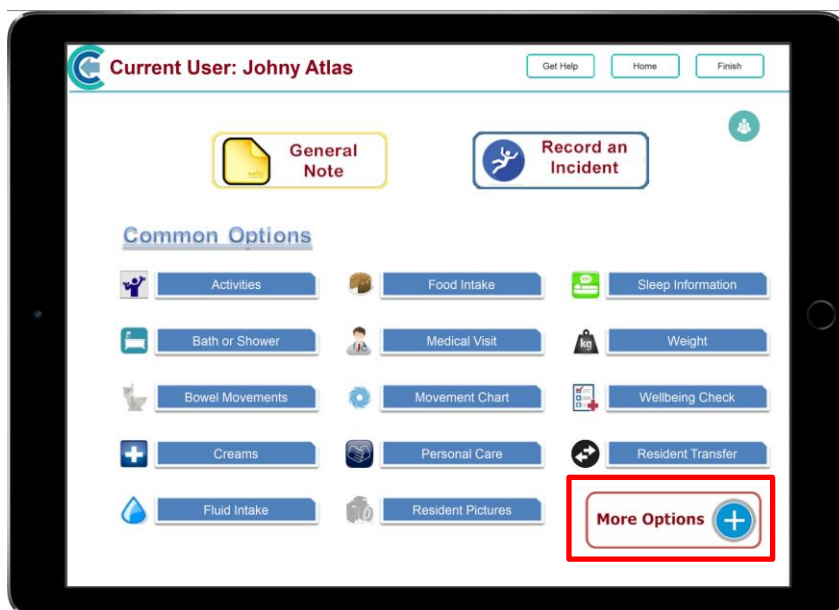
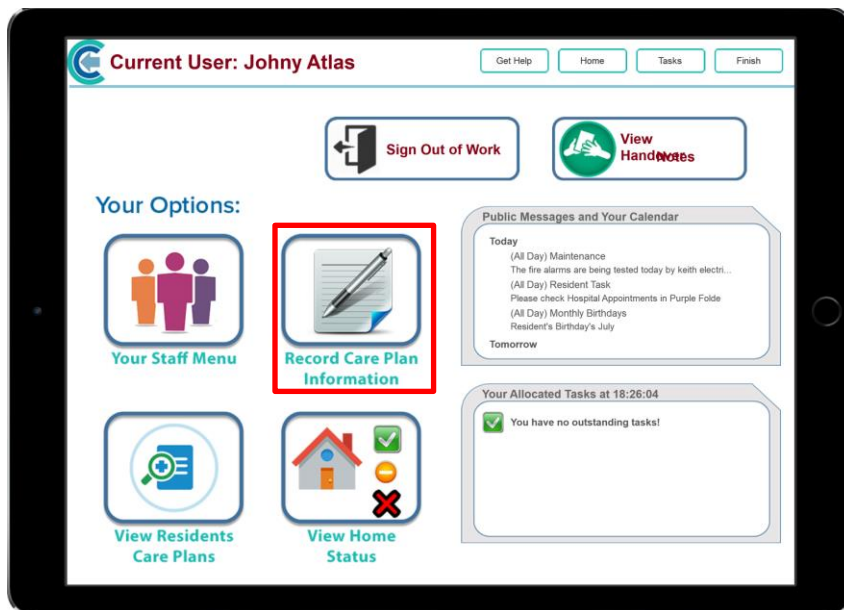
Memory Box

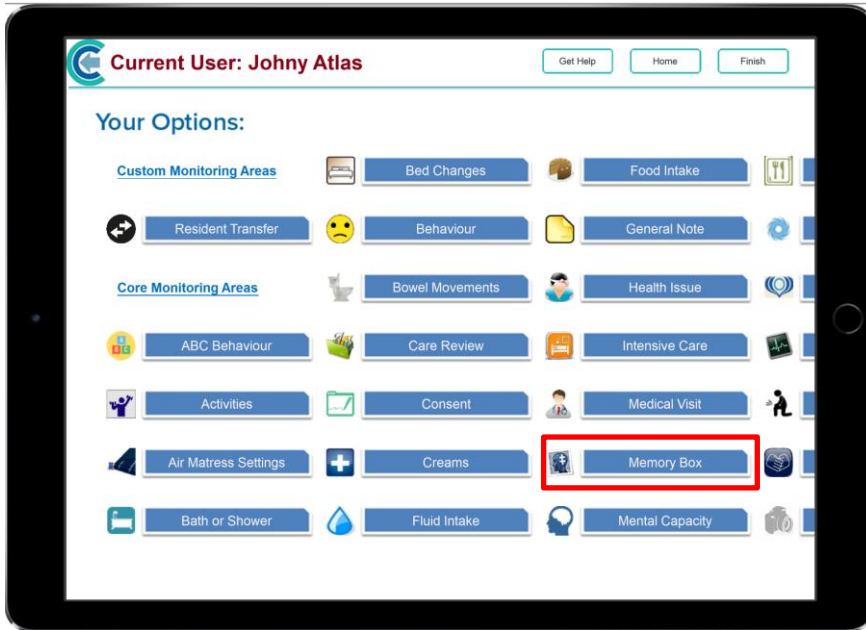
As part of this release we are developing a new feature called Memory Box. This is to allow family members to submit “memories” to service users for review and a response to be recorded.

With this initial release the memories can only be recorded through the Record Care Plan Information screen of Care Control Mobile.

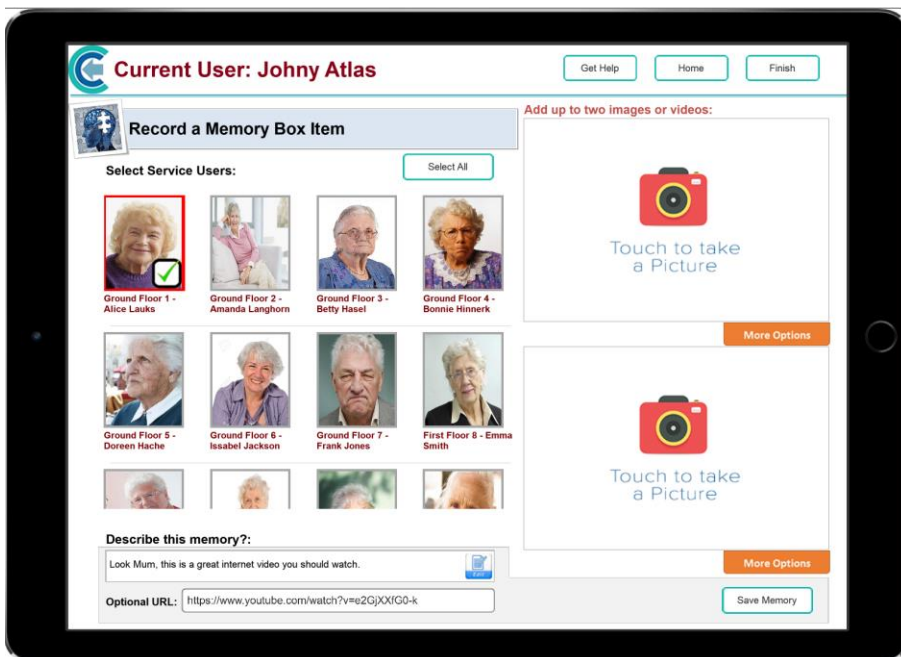
Recording a Memory

You can access the Record a Memory option within CC Mobile through the following screens: -





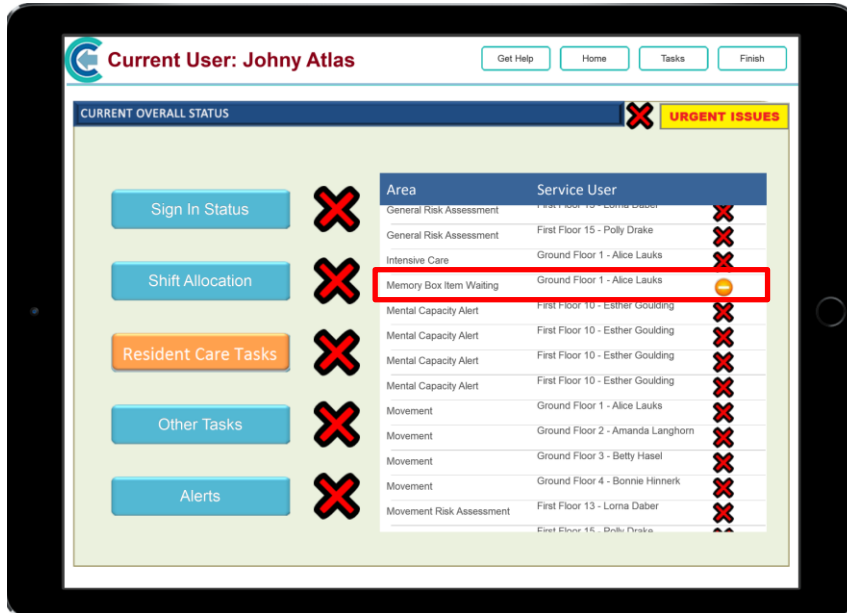
This will load the Record a Memory Box option: -



In this example we are loading an internet link to a YouTube video for Mrs Alice Lauks.

Reviewing a Memory

When a memory item has been recorded for a service user, you will be notified on your Home Status Screen / Service User Task Screen: -



If you touch this item it will load the review screen for that memory: -



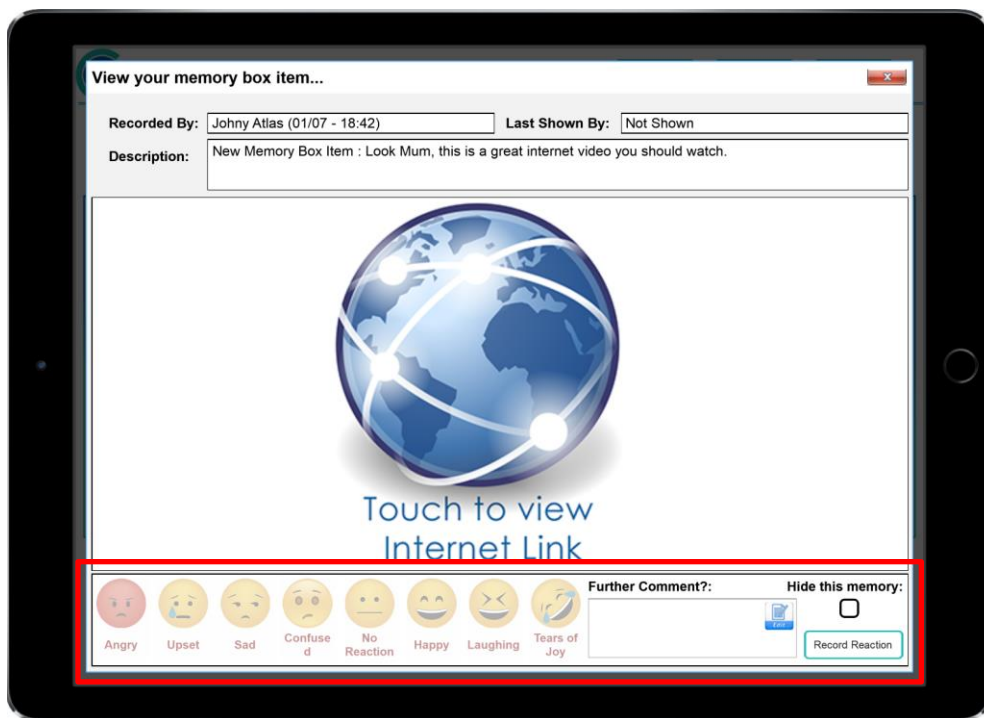
Depending upon the memory type you will either be shown the pictures, the video or an internet globe that links to the website that has been loaded.

The idea is that this review takes place with the service user.

Once the service user has reviewed the memory, you can then record a reaction.

Recording a Reaction

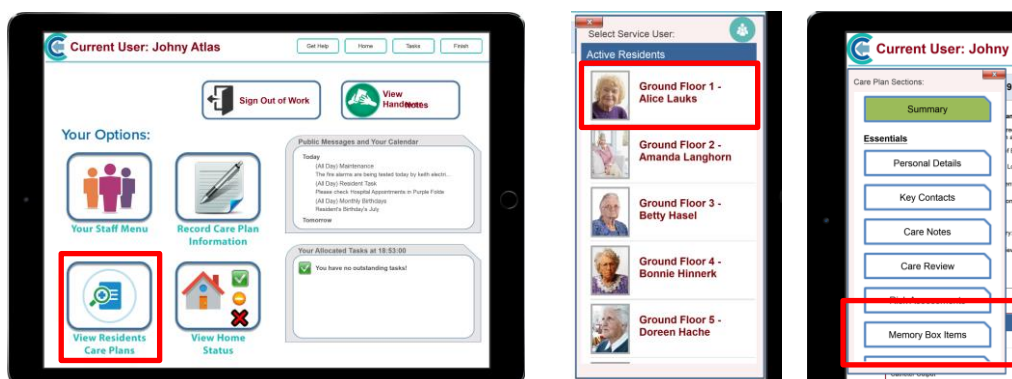
When you view a memory you can record a service user reaction: -



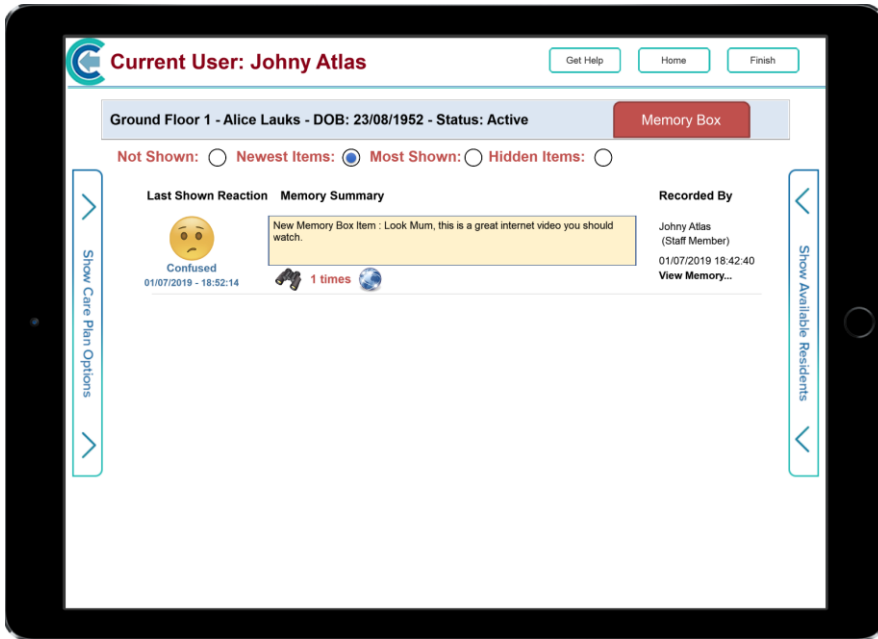
You simply touch the emoticon, enter a comment (optional) and select Record Reaction. If the reaction as negative you may choose to Hide This Memory, which will stop the memory being shown again.

Viewing Memories

The memories and any reactions are shown in the service user's care plans: -

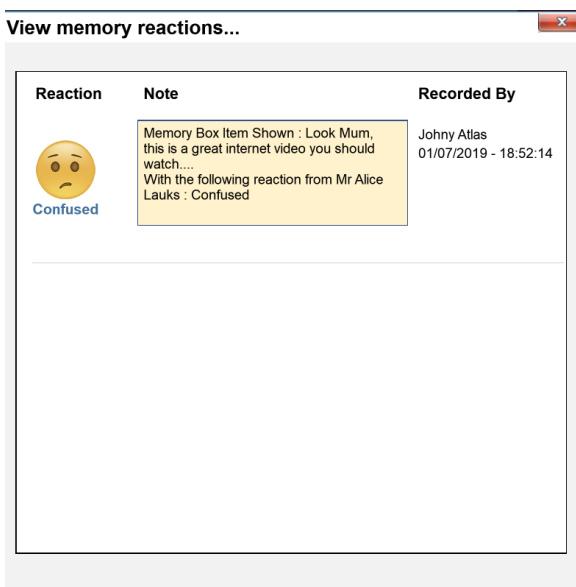


This will then load the memory review screen: -



It displays the memories for that service user. If you touch the View Memory, this will display the memory again.

If you select the emoticon, you can see a history of the memory reactions: -



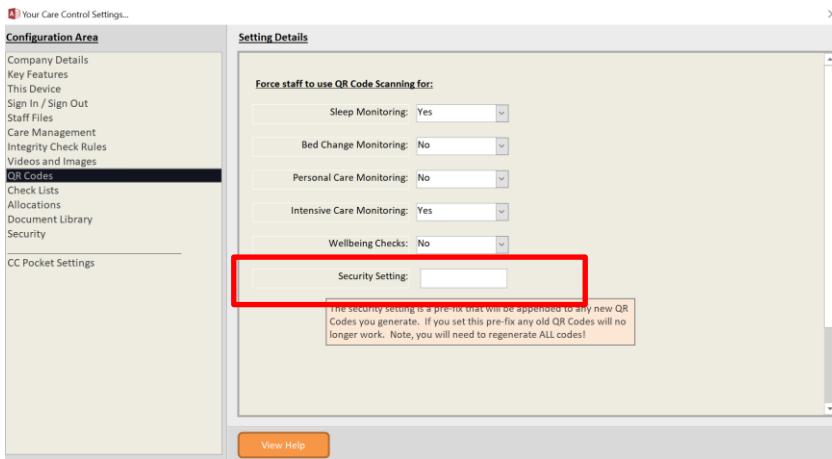
Office 365 Installation

As part of this update we are launching the new Office 365 installation. If any of you are struggling with Microsoft Office updates, please contact the office to have the new installer put onto your computer.

QR Code Security Reference

As part of this release, we have introduced a security reference for QR Codes. This is to force existing client QR Codes to expire.

To update the QR Code Reference you need to go to System Settings – QR Codes: -



Once you have updated this option you will need to Regenerate All Codes: -

