

Care Control December 2020

CC Windows, Pocket & Mobile

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Introduction by Matt Luckham

Our regular update of Care Control. In this update we have implemented a new version of our Payroll Module. It is a significant update and at this stage we are calling it a “Beta” release. This means that you can use it, but please be careful that there are no bugs the testing team have missed.

Systems Versions

After this update you need to be using CC Windows 3.36, CC Pocket 2.14 and CC Mobile 4.46.

Release Timetable

Your Cloud Database will be updated on a gradual process of the next few weeks. CC Windows will automatically update to version 3.36. You can download CC Pocket 2.14 and CC Mobile 4.46 now.

Background

This update includes some key changes to Payroll and Roster. We need to add more sophisticated support for our customers who have more complex business structures. By using the Care Service Groups and a new Manager Field, organisations can split access to the system without having to create a separate site.

We have added a host of reports, including specific support for eMar in this update.

This will be the final “big” release on CC Windows before its retirement next year. CC Windows is a system which is almost 10 years old. We have a replacement system that is under development that we plan to roll out next year. This new system will be easier to access, easier to understand and more flexible to the end user requirements.

There will of course be further tweaks to CC Windows in the coming months.

Summary of the Changes

The following forms a list of the changes included in this release: -

- **Payroll System 2.0**
A completely new Payroll System which is based on exceptions. Includes support for Mileage and Journey Costs. A new Work Record replaces the Timesheet, with further support for salary and recurring payments.
- **New Staff Fields inc. COVID Vaccine Support**
We have added extra fields in the Staff Record including NHS Number, GP Surgery, Driving Flags and support for COVID Vaccines.
- **Staff Manager Structure**
We have added a new manager structure on the staff record. This can be used to split the staff members up and is used throughout the system to filter records for that manager.
- **Incident Summary Descriptions**
You can now enter your own Incident Summary Descriptions if you want to.
- **Medication Reports**
Support for eMar reports within CC Windows.
- **Other Reports**
Lots of new reports that you can access including Movement and Turning Reports.
- **Further Offline Pocket Support**
Further tweaks around how and when Pocket may work offline.
- **Performance Improvements**
Plenty of performance improvements to make the system run more quickly.

Payroll System 2.0

With this release we have created a new payroll system. Although some of the calculations are based on the old payroll, in reality this is new. It can be used in conjunction with the old payroll for now.

Conceptual Changes

It is important to understand the key conceptual changes to Payroll 2.0.

Timesheets replaced with Work Records

We have removed the concept of a Timesheet in this release and replaced it with a Work Record.

The timesheet is a document that staff members can complete, change and amend.

The Work Record is generated by the Roster System based on what work we believe has / will be completed. The user can request adjustments to the Work Record, but those adjustments need to be confirmed and verified.

Payroll Managers

The responsibility of reviewing adjustment requests can now be shared across multiple people in the form of Payroll Managers. These can be restricted to a team or the entire company, with access permission restricted to key areas of the Payroll System.

Exception Based Analysis

The purpose of Payroll within Care Control was always to allow you to review the data and amend it if you feel it was incorrect. However, you had to “look” for the issues. In this new release, the system can be configured to identify “issues” and present options for you to correct, ignore or modify the outcome of those issues.

Support for Travel

Within this new release we have added specific support of staff journeys, mileage and travel costs.

Recurring Exceptional Lines

Within this release you can set-up recurring exceptional lines. This could be for statutory payments, loan repayments or a recurring bonus.

Holiday Pay Recalculated

We have added support for the correct method of calculating holiday pay based on the latest government directives. Holidays are added to the Work Record independently from the Roster, something that the old Payroll did not do.

Extensive Reporting

The new Payroll includes many more reports that can be used for analysis of your monthly pay run.

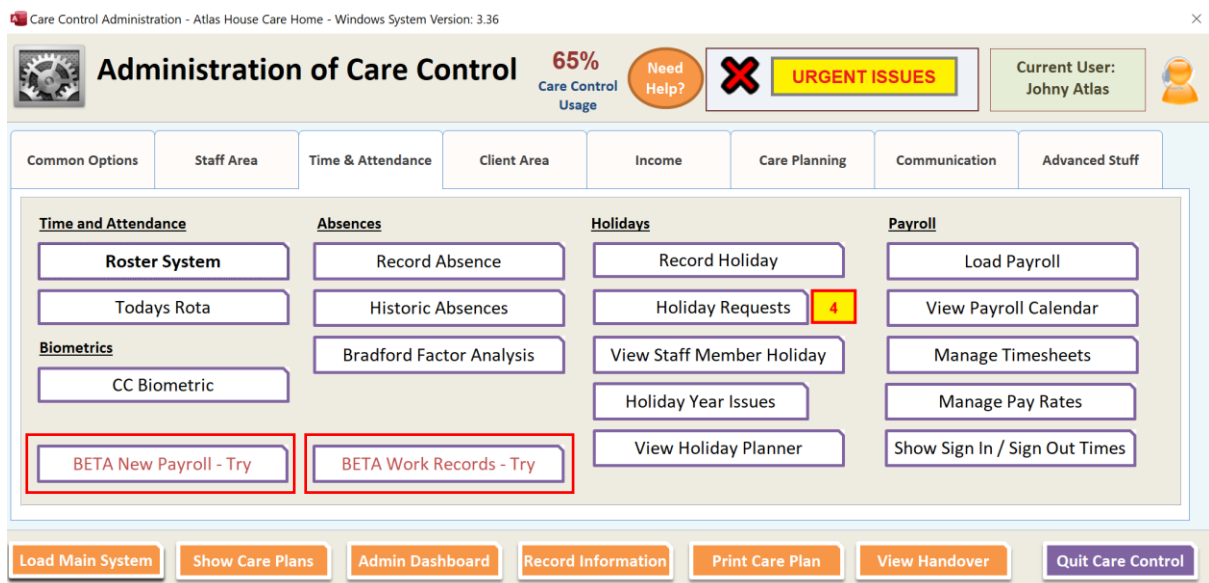
Getting Started

You can only access the new Payroll through CC Windows. On this release it is under a BETA release as we want you to use it, but understand it may contain bugs or errors.

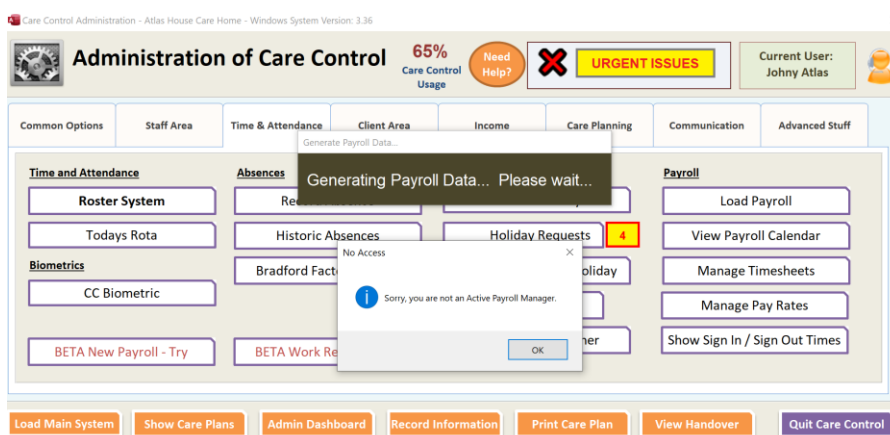
It is assumed that you: -

1. Understand how to add / amend staff pay rates
2. Have created a Payroll Calendar

Under Time & Attendance you will see the two new options: -



Click on BETA New Payroll – Try and you will see the following error message: -

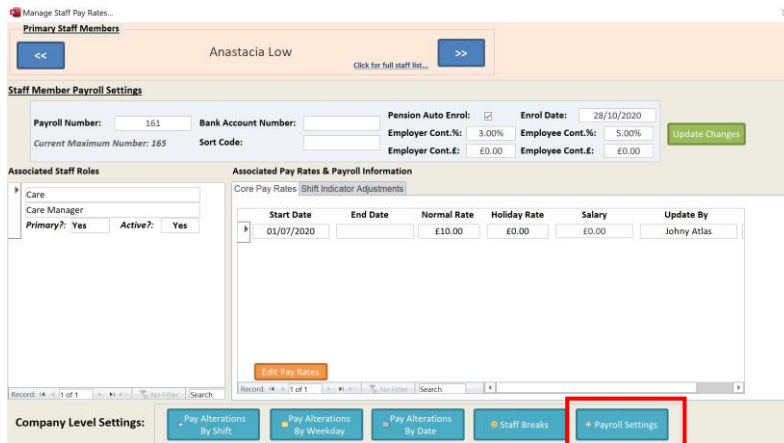


Setting Up Payroll Managers

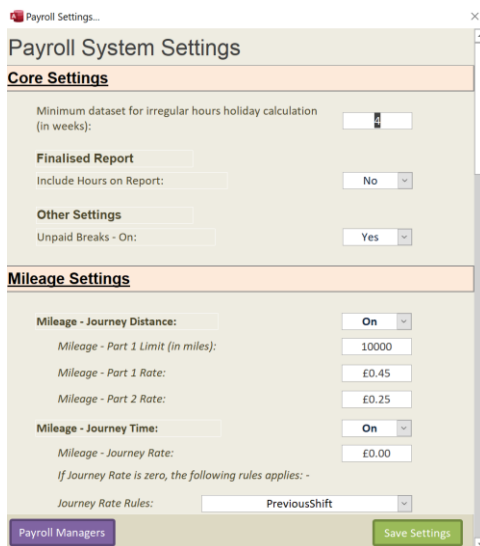
With this release we have introduced the concept of a Payroll Manager. A Payroll Manager is a staff member who has access to some part of the Payroll System. To create yourself as a Payroll Manager you first need to access the Payroll Settings.

Payroll Settings

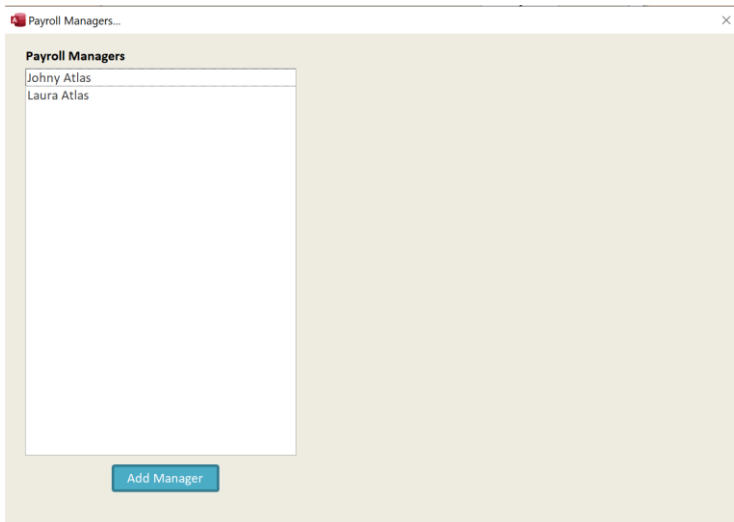
Payroll Settings can be accessed via the Manage Pay Rates section of Care Control. With this area you will see the Payroll Settings option: -



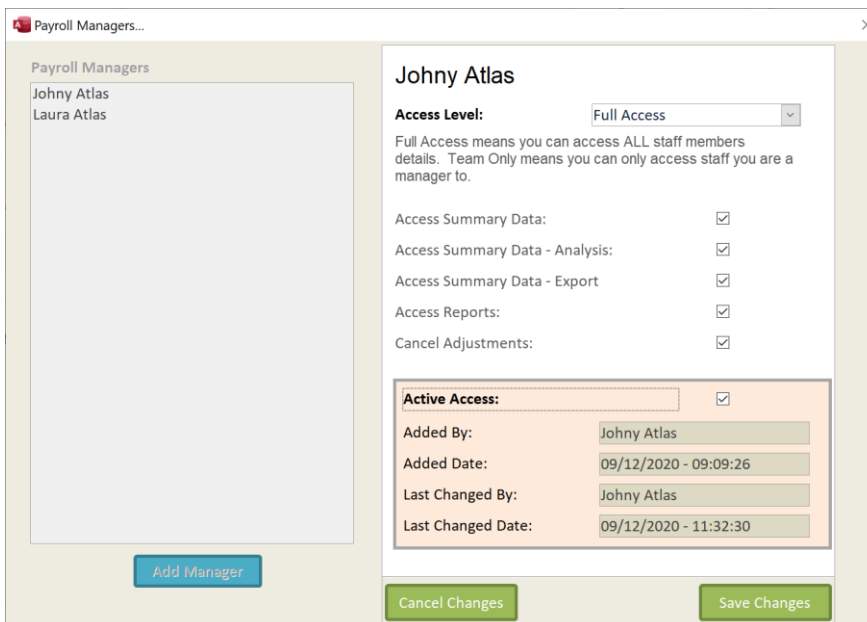
When you click on this button you will see the following screen: -



There are lots of settings here which we will touch on as we go through the Payroll System, but for now click on the Payroll Manager's button in the bottom left: -



Click Add Manager to add a new Payroll Manager: -



Here I have selected Johnny Atlas and given him Full Access. Full Access means they can access ALL staff pay records. The alternative is Team Only.

Manager's Teams

A Payroll Manager can also be a Manager of staff. With this release we have added a Manager Field within the Staff Records area: -

Manage Staff Records...

Active Staff Members

Mr Johnny Atlas

Other Functions

Managers Name: No Manager

Name: Mr Johnny Atlas

Address: 22 Atlas House
West Devon Business Park
Tavistock
Devon

Post Code: PL19 9DP

Initials: ML

Primary Tel No: 01822 738100

Date of Birth: 17/08/1973

Secondary Tel No:

Start Date: 01/09/2010

Third Tel No:

NI Number: PK-12-34-56-A

Email Address:

Copy any messages I receive to my Email?:

Change Image...

Cancel Changes Save Changes

You can set this field for multiple staff members, creating a “team” of staff who report back to that manager.

Once you have created yourself as a Payroll Manager you can now access the new Payroll.

New Payroll – First Load

The screenshot shows the 'Payroll Manager' application window. At the top, there is a 'Manager Filter' dropdown set to 'All Managers', with 'Apply Filter' and 'Clear Filter' buttons. Below this, the 'Payroll Period' is 'November 2020' and the 'Payroll Cost' is '£36,201 -10.1%'. A 'Show Detail' button is visible. The main area displays 'Outstanding Issues: 386' and 'Resolved Issues: 0', along with 'Potential Adjustment: £ -4,468' and 'Actual Adjustment: £ 0'. A 'View' button is next to the resolved issues. Below this is a table with columns for 'Display Issues' and 'Display Staff Adjustment'. The table lists various staff members and their associated costs for different dates in November 2020. At the bottom, there are buttons for 'Payroll Settings', 'Reports', 'Refresh Data', and 'Run Draft Payroll >>'. A search bar at the bottom left shows 'Record: 1' and 'Unfiltered'.

Date	Staff Name (Role)	Issue	Staff Adjustment
25/11/2020	Kim Smith (Care Assistant)	Sign In / Sign Out Issues	-10.00
		No Sign In for Shift	-£196.20
25/11/2020	Judith Thomas (Care Assistant)	Sign In / Sign Out Issues	-10.00
		No Sign In for Shift	-£196.20
06/11/2020	Judith Thomas (Care Assistant)	Sign In / Sign Out Issues	-10.00
		No Sign In for Shift	-£196.20
05/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
03/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
25/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
11/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
16/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
23/11/2020	Cathy Jenkins (Maintenance)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£93.60
25/11/2020	Lorna Atlas (Care Assistant)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£92.00
25/11/2020	Dave West (Care Manager)	Sign In / Sign Out Issues	-8.00
		No Sign In for Shift	-£90.00
29/10/2020	Kelly Smith (Care Manager)	Sign In / Sign Out Issues	-8.00

When the new Payroll System first loads you will see a screen similar to above. This screen has lots of information, so let's go through each section: -

This partial screenshot shows the top section of the 'Payroll Manager' interface, including the 'Manager Filter' dropdown set to 'All Managers' and the 'Apply Filter' and 'Clear Filter' buttons.

At the top you have a simple filter to look at the payroll through either your access or through a manager's access. If you are a manager with Team Only access only your name will appear here. Only managers with actual staff assigned will be listed here.

Payroll Period: November 2020
 Payroll Cost: £36,201 -10.1% [Show Detail](#)

The next section loads the current active pay period (as you have named it in your calendar) and the total Payroll Cost with an indication as to how that cost has changed since the previous pay period.

The total cost is made up of: -


- Staff Working Hours
- Holiday Pay
- Travel Costs (if switched on)
- Exceptional Lines (including Adjustments)
- Employer Pension Contributions

What does it NOT include (yet!): -

- Employer National Insurance Costs
- Statutory Payments (SSP or SMP etc.)

If you click on Show Detail you will see a breakdown of that number: -

Cost Per Day:	...	£1,206.70	-7.1%	Last Refresh:	09/12/2020 - 11:48:41
Holiday Pay:	...	£3,158.99	+72.9%	Period Dates:	27/10/20 to 25/11/20
Exceptional Lines:	...	£0.00	0.0%	Locked Date:	25/11/2020
Pension Cost:	...	£414.70	-68.2%	Export Summary	
Mileage Pay:	...	£0.00	0.0%	Hide Detail	

The green buttons  will either run a report or load a screen for further detail.

The next section is about the issues and adjustments you have made: -

Outstanding Issues:	386	Resolved Issues:	0
Potential Adjustment:	£ -4,468	Actual Adjustment:	£ 0

[View](#)

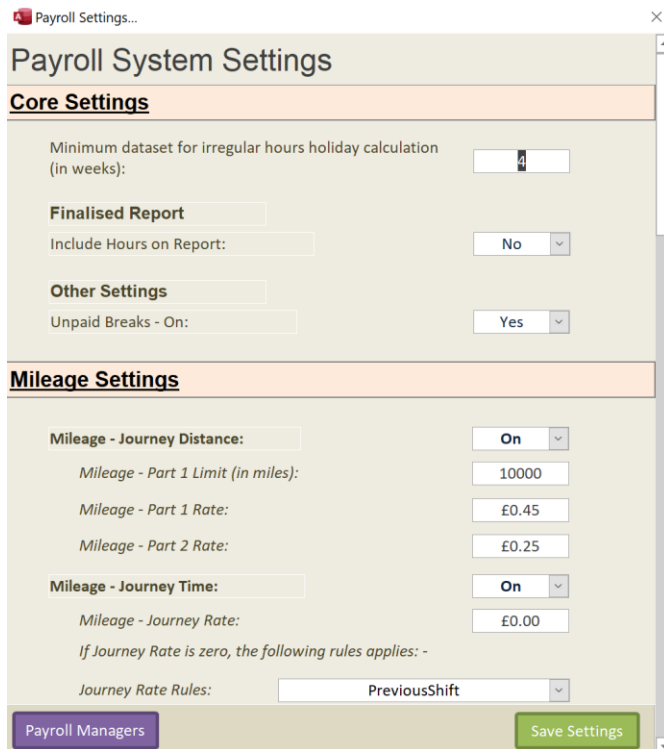
Issues

Issues are created by either staff members (through proposed adjustments) or automatically by the system (through the rules you have set in your system settings). The system provides a summary of the total number of issues you have to review, the potential adjustment saving (or cost) that agreeing to those issues will have, how many you have resolved and what the actual adjustment is.

The purpose of the new Payroll System is to review each of the issues generated and either confirm or refuse them.

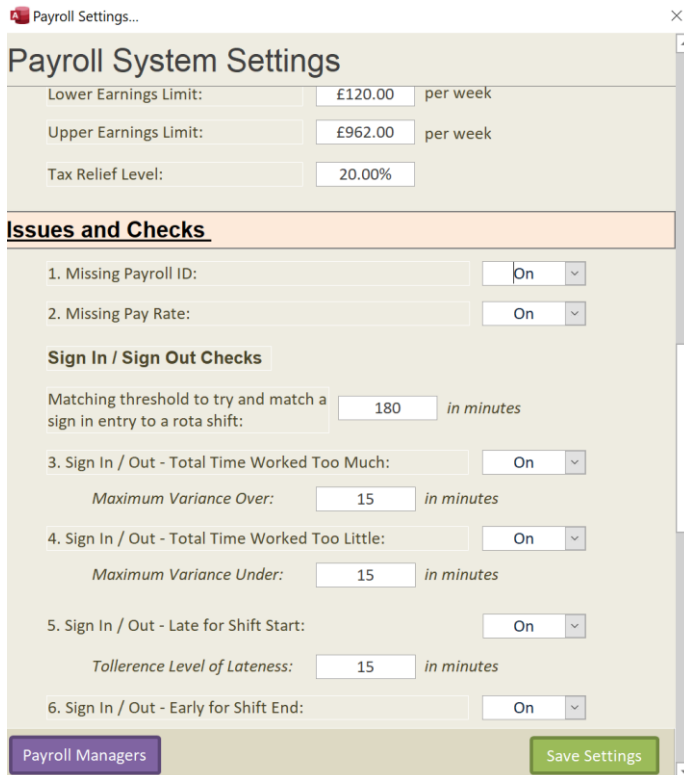
Automatic Issues

You switch on which issues the system automatically processes within the Payroll System Settings. Clicking on this option you will see the following: -



The screenshot shows the 'Payroll System Settings' window. The 'Core Settings' section includes: 'Minimum dataset for irregular hours holiday calculation (in weeks):' with a value of 4; 'Finalised Report' section with 'Include Hours on Report:' set to 'No'; and 'Other Settings' section with 'Unpaid Breaks - On:' set to 'Yes'. The 'Mileage Settings' section includes: 'Mileage - Journey Distance:' set to 'On'; 'Mileage - Part 1 Limit (in miles):' set to 10000; 'Mileage - Part 1 Rate:' set to £0.45; 'Mileage - Part 2 Rate:' set to £0.25; 'Mileage - Journey Time:' set to 'On'; 'Mileage - Journey Rate:' set to £0.00; and 'Journey Rate Rules:' set to 'PreviousShift'. At the bottom, there are buttons for 'Payroll Managers' and 'Save Settings'.

If you scroll down you will see the Issues Options: -



The screenshot shows the 'Payroll System Settings' window, scrolled down to the 'Issues and Checks' section. It includes: 'Lower Earnings Limit:' set to £120.00 per week; 'Upper Earnings Limit:' set to £962.00 per week; 'Tax Relief Level:' set to 20.00%; and a list of issues: '1. Missing Payroll ID:' set to 'On'; '2. Missing Pay Rate:' set to 'On'; 'Sign In / Sign Out Checks' section with 'Matching threshold to try and match a sign in entry to a rota shift:' set to 180 in minutes; '3. Sign In / Out - Total Time Worked Too Much:' set to 'On' with 'Maximum Variance Over:' set to 15 in minutes; '4. Sign In / Out - Total Time Worked Too Little:' set to 'On' with 'Maximum Variance Under:' set to 15 in minutes; '5. Sign In / Out - Late for Shift Start:' set to 'On' with 'Tolerance Level of Lateness:' set to 15 in minutes; and '6. Sign In / Out - Early for Shift End:' set to 'On'. At the bottom, there are buttons for 'Payroll Managers' and 'Save Settings'.

The checks you can configure are as follows: -

Issue	Further Detail
1. Missing Payroll ID:	This is a critical issue. Every staff member should have a Payroll ID as this is used to produce the final payroll report. If this check is left on you will get a warning if it identifies anyone on start up.
2. Missing Pay Rate:	All staff who are on the payroll should have a basic rate of pay.
3. Matching threshold to try and match a sign in entry to a rota shift:	<p>The Sign In / Sign Out Issues have to try and match the activity of the staff member with a Roster Entry.</p> <p>For example, if a shift on the rota states staff member should start work at 8am and finish work at 2pm, and they sign in at 9.30am, we want the system to link that sign-in event to the roster shift (e.g. they are 90 minutes late for work!). We need a threshold as it is possible for staff to have multiple shifts for a day.</p>
<p>4. Sign In / Out - Total Time Worked Too Much:</p> <p>Maximum Variance Over:</p>	<p>If a staff member works too much time the system can generate an issue. For example, if a staff member is assigned a shift 8am until 2pm. If they sign in at 7.30am and sign out at 1.55pm, the total time they worked is 6 hours, 25 minutes.</p> <p>You can set the maximum variance in which to flag the issue for you. So if you set that variance to 30 minutes the above example would not generate an issue.</p>

<p>5. Sign In / Out - Total Time Worked Too Little:</p> <p>Maximum Variance Under:</p>	<p>The same as above, but this time working too little for a shift.</p>
<p>6. Sign In / Out - Late for Shift Start:</p> <p>Tolerance Level of Lateness:</p>	<p>The staff member signed in late for the start of a shift. Tolerance Level of Lateness is how late can they be before the system generates an issue.</p>
<p>7. Sign In / Out - Early for Shift End:</p> <p>Tolerance Level for Early End:</p>	<p>The staff member signed out early for the shift end. Tolerance Level for Early End is how early they can sign out without an issue being generated.</p>
<p>8. Sign In / Out - No Sign In for Shift:</p>	<p>The staff member has shifts on the rota, but there is no sign-in information for that day.</p>
<p>9. Sign In / Out - Sign In, but no Shift:</p>	<p>The staff member has signed in, but there is no shift on the rota.</p>
<p>9. Sign In / Out - No Sign Out for Shift:</p>	<p>The staff member has shifts on the rota, but there is no sign-out information for that shift.</p>
<p>11. Check In / Check Outs</p>	<p>For our community based customers we recommending using our Pocket Devices with the Geocode Check In / Check Out switched on. This is similar to Sign In / Sign Out, but also stores a GPS location of the staff member.</p>
<p>12. Matching threshold to try and match a Check-in entry to a rota shift:</p>	<p>This is the setting that matches a check-in to a rota shift. Due to the tendency of community-based workers to have more shorter shift, this setting should not be set to too high a level.</p>
<p>13. Missing location data for home care clients</p>	<p>If you are using Check In / Check Out you need to make sure that Geo Code data is loaded for a client's home address. This</p>

	check will warn you if there is any Geo Code data missing for a client.
14. Check In early for Planned Visit: Tolerance Level for Early Start:	This can flag if a staff member has checked in early for a shift. The Tolerance Level for Early Start is in minutes and indicates when the issue will be raised. For example, if the target time on the rota is to be there at 9am and the staff member checks in at 8.50am, if the Tolerance Level for Early Start is set to 5 minutes then the check in would generate an issue.
15. Check In late for Planned Visit: Tolerance Level for Late Start:	Reverse of the above check, this is if a staff member checks in late for a visit.
16. Check Out early for Planned Visit:	Flags as an issue if the staff member checks out early. The tolerance level is the same as above.
17. Check Out late for Planned Visit:	Flags as an issue if the staff member checks out late for the planned visit. The tolerance level is the same as above.
18. Check In Missing for a Planned Visit:	Visit is on the Roster System, but no check in has been recorded.
19. Checked In, but no planned visit:	Staff member has checked in, but there is no Roster entry for the visit.
20. Check In outside of specified range for Client:	The check-in occurred, but the GPS reading indicates outside of an acceptable range.
21. Check Out outside of specified range for Client:	The check-out occurred, but the GPS reading indicates outside of an acceptable range.

22. Acceptable Check In / Out Range:	A value to indicate the maximum distance away a check-in or check-out can occur. The GPS for the client's location is based on the post code. Post Codes can have a broad range of a few hundred metres, so there will often be a variance. We recommend that you should set a minimum of 500 metres (or 0.5).
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Contiguous Shifts

It is common to have shifts that adjoin each other, especially if you are using shift indicators to pay differently for a specific shift. Look at this example: -

A care worker will occasionally "step up" to be in charge of a shift. During this in charge period, the care worker would receive an increase in pay rate.

In this example the care worker worked an 14:00 to 22:00, or an 8 hour shift. But between the hours of 4pm and 8pm they were asked to be in charge.

On the Roster System the shifts would be: -

- 14:00 – 16:00
- 16:00 – 20:00I
- 20:00 – 22:00

Note the use of "I", which for this care home is a shift indicator meaning "In Charge".

The Payroll System will treat the contiguous shifts differently.

Shift 1: 14:00 – 16:00

This shift the system will expect a Sign In, but no Sign Out.

Shift 2: 16:00 – 20:00I

This shift the system will not expect any Sign In or Sign Out

Shift 3: 20:00 – 22:00

For this shift the system will expect a Sign Out, but no Sign In.

Dealing with Issues

When you load Payroll any issues appear on the left hand side of the screen: -

The screenshot shows the Payroll Manager interface. At the top, there is a 'Manager Filter' set to 'All Managers' with 'Apply Filter' and 'Clear Filter' buttons. Below this, the 'Payroll Period' is 'November 2020' and the 'Payroll Cost' is '£36,201 -10.1%'. A 'Show Detail' button is visible. The summary section shows 'Outstanding Issues: 386', 'Resolved Issues: 0', 'Potential Adjustment: £ -4,468', and 'Actual Adjustment: £ 0'. A 'View' button is next to the resolved issues count. The main area is a table of payroll issues, with columns for date, name, role, sign-in/out issues, and amount. A red box highlights the table. At the bottom, there are buttons for 'Payroll Settings', 'Reports', 'Refresh Data', and 'Run Draft Payroll >>'.

Date	Name	Role	Sign In / Sign Out Issues	No Sign In for Shift	Amount
06/11/2020	Judith Thomas	Care Assistant	No Sign In for Shift		-10.00
25/11/2020	Kim Smith	Care Assistant	No Sign In for Shift		-10.00
25/11/2020	Judith Thomas	Care Assistant	No Sign In for Shift		-10.00
25/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
11/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
16/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
05/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
03/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
23/11/2020	Cathy Jenkins	Maintenance	No Sign In for Shift		-8.00
25/11/2020	Lorna Atlas	Care Assistant	No Sign In for Shift		-8.00
25/11/2020	Dave West	Care Manager	No Sign In for Shift		-8.00
29/10/2020	Kelly Smith	Care Manager			-8.00

You can filter or order this list by right clicking on your mouse: -

This screenshot is similar to the first one, but it shows a context menu open over the table. The menu options include 'Delete Record', 'End...', 'Sort A to Z', 'Sort Z to A', 'Remove Filter/Sort', 'Filter By Selection', and 'Filter Excluding Selection'. A red box highlights the context menu. The rest of the interface, including the summary and buttons, is the same as in the first screenshot.

Each issue can be looked into by clicking the blue button: -



The following is an example of an issue: -

Payroll Manager...

Manager Filter: All Managers Apply Filter Clear Filter

Payroll Period: November 2020
 Payroll Cost: £36,201 -10.1% Show Detail

Outstanding Issues: 386 **Resolved Issues:** 0
Potential Adjustment: £ -4,468 **Actual Adjustment:** £ 0 View

<input checked="" type="checkbox"/> Display System Issues		<input checked="" type="checkbox"/> Display Staff Issues		
02/11/2020	Joan James (Domestic)		-2.00	
Sign In / Sign Out Issues		Early for Shift End	-£17.60	
29/10/2020	Loretta Smith (Domestic)		-1.98	
Sign In / Sign Out Issues		Early for Shift End	-£17.42	
05/11/2020	Debbie Thomas (Activities Co-Ordinator)		-1.57	
Sign In / Sign Out Issues		Late for Shift Start	-£14.44	
27/10/2020	Kelly Smith (Care Manager)		-1.25	
Sign In / Sign Out Issues		Late for Shift Start	-£14.06	
28/10/2020	Kelly Smith (Care Manager)		-1.23	
Sign In / Sign Out Issues		Late for Shift Start	-£13.84	
11/11/2020	Kelly Smith (Care Manager)		-1.22	
Sign In / Sign Out Issues		Late for Shift Start	-£13.73	
29/10/2020	Christina Hughes (Care Assistant)		-1.47	
Sign In / Sign Out Issues		Late for Shift Start	-£13.52	
05/11/2020	Laura Atlas (Care Manager)		-1.00	
Sign In / Sign Out Issues		No Sign In for Shift	-£13.40	
01/11/2020	Lorna Atlas (Care Assistant)		-1.00	
Sign In / Sign Out Issues		Late for Shift Start	-£11.50	
05/11/2020	Dave West (Care Manager)		-1.00	
Sign In / Sign Out Issues		No Sign In for Shift	-£11.25	
17/11/2020	Joan James (Domestic)		-1.00	
Sign In / Sign Out Issues		Early for Shift End	-£8.80	
05/11/2020	Joan James (Domestic)		-1.00	

Record: 59 of 386 Unfiltered

View Rota Sign In Data Check In Data Wk Record

Payroll Settings Reports Refresh Data Run Draft Payroll >>

Issue Detail

Working Date: 02/11/2020

Category: Sign In / Sign Out Issues

Sub Category: Early for Shift End

Detail: Joan James finished early for their shift (10:00 - 16:00) by 120 minute(s) on the 02/11/2020

Staff Member: Joan James (Domestic)

Time Affected: -2.00

Potential Value: -£17.60

Options to Resolve This Issue

Add an adjustment to the staff member of:
 Adjustment £: -£17.60
 Hours: -2.00
 Explanation: Joan James finished early for their shift (10:00 - 16:00) by 120 minute(s) on the 02/11/2020 Resolve

Mark as Chargeable Adjustment to the Client

Ignore this issue

In this example we have a staff member (Joan James) who was supposed to work a 10:00 until 16:00 shift and signed out early by 2 hours.

On the right you have the issue detail and on the bottom right you have the ways to resolve the issue: -

Options to Resolve This Issue

Add an adjustment to the staff member of:


Adjustment £:

Hours:

Explanation:

Mark as Chargeable Adjustment to the Client

Ignore this issue



Resolve

View Rota
Sign In Data
Check In Data
Wk Record

You have two options: -

1. Add an adjustment

You can amend the adjustment amount and hours at this stage if you want.

2. Ignore the issue

Ignoring the issue means that no adjustment will be made and the issue will just be removed.

At the bottom you will see buttons to help you look into the issue. In this example I will press the Sign In Data button to see what the full sign-in time was: -

Joan James	02/11/2020 08:06:50	02/11/2020 14:00:26
------------	---------------------	---------------------

As you can see the staff member actually signed in just after 8am and finished at 2pm. This looks like the rota has not been updated. In this case I would opt to Ignore this issue.

Another example: -

Payroll Manager... - □ ×

Manager Filter: All Managers Apply Filter Clear Filter

Payroll Period: November 2020
 Payroll Cost: **£36,201 -10.1%** Show Detail

Outstanding Issues: 385	Resolved Issues: 1 View
Potential Adjustment: £ -4,450	Actual Adjustment: £ 0

Display System Issues Display Staff Issues

05/11/2020	Christina Hughes (Care Assistant)	-0.68	➔
Sign In / Sign Out Issues	Late for Shift Start	-£6.26	
22/11/2020	Anastacia Low (Care Manager)	-0.60	➔
Sign In / Sign Out Issues	Late for Shift Start	-£6.00	
07/11/2020	Dave West (Care Manager)	-0.53	➔
Sign In / Sign Out Issues	Late for Shift Start	-£5.96	
19/11/2020	Olga Smith (Domestic)	-0.48	➔
Sign In / Sign Out Issues	Late for Shift Start	-£5.62	
04/11/2020	Olga Smith (Domestic)	-0.47	➔
Sign In / Sign Out Issues	Late for Shift Start	-£5.50	
07/11/2020	Clara Smith (Care Assistant)	-0.55	➔
Sign In / Sign Out Issues	Late for Shift Start	-£5.06	
12/11/2020	Olga Smith (Domestic)	-0.42	➔
Sign In / Sign Out Issues	Late for Shift Start	-£4.91	
11/11/2020	Annie Thomas (Care Assistant)	-0.48	➔
Sign In / Sign Out Issues	Early for Shift End	-£4.42	
09/11/2020	Laura Atlas (Care Manager)	-0.43	➔
Sign In / Sign Out Issues	Late for Shift Start	-£4.30	
17/11/2020	Kelly Smith (Care Manager)	-0.27	➔
Sign In / Sign Out Issues	Late for Shift Start	-£3.04	
18/11/2020	Lois Smith (Cook)	-0.28	➔
Sign In / Sign Out Issues	Early for Shift End	-£2.69	
24/11/2020	Lois Smith (Cook)	-0.25	➔

Record: 14 | 74 | Unfiltered Search

Issue Detail

Working Date: 05/11/2020

Category: Sign In / Sign Out Issues

Sub Category: Late for Shift Start

Detail: Christina Hughes arrived late for their shift (16:00 - 22:00) by 41 minute(s) on the 05/11/2020

Staff Member: Christina Hughes (Care Assistant)

Time Affected: -0.68

Potential Value: -£6.26

Options to Resolve This Issue

Add an adjustment to the staff member of:
 Adjustment £: -£6.26
 Hours: -0.68
 Explanation: Christina Hughes arrived late for their shift (16:00 - 22:00) by 41 minute(s) on the 05/11/2020 Resolve

Mark as Chargeable Adjustment to the Client

Ignore this issue

View Rota | Sign In Data | Check In Data | Wk Record

Payroll Settings
Reports
Refresh Data
Run Draft Payroll >>

In this example the staff member arrived late for her 4pm shift. The Sign In time shows the following: -

Christina Hughes	05/11/2020 16:41:30	05/11/2020 22:02:20
------------------	---------------------	---------------------

In this example I will select to add the adjustment.

When the issues are resolve the Payroll Cost, Summary Data and the Issues Summary are all updated: -

Outstanding Issues: 384	Resolved Issues: 2 View
Potential Adjustment: £ -4,444	Actual Adjustment: £ -6

Staff Issues

Along with the system-generated issues, there are Staff Issues which come from the staff members requesting adjustments to their Work Record. These are mixed into your issues screen, but can be separated by simply choosing not to show the system issues: -

Display System Issues Display Staff Issues

When you click on a Staff Issue you can a different screen: -

Staff Adjustment

Working Date: 09/11/2020

Category: Staff Member Adjustment

Sub Category: Hours Adjustment

Detail: Laura Atlas has proposed an increase in hours of 0.25 on 09/11/2020 for the original shift of 08:00 - 16:00

Current Shift / Hours

Role: Care Manager

Shift: 08:00 - 16:00

Shift Indicator:

Allocation: No Allocation

No Allocation

Total Hours: 8

Proposed Changes * Indicates Whats Changed

Role: Care Manager

Shift: * 08:00 - 16:15

Shift Indicator:

Allocation: * No Allocation

No Allocation

Total Hours: * 8.25

[View Rota](#) [Sign In Data](#) [Check In Data](#) [Wk Record](#)

You are shown a summary of the issue, the Current Shift, the Proposed Changes.

Shift:	*	08:00 - 16:15
Shift Indicator:		
Allocation:	*	No Allocation
Total Hours:	*	8.25

Staff Member Reason for Change:

Stayed on later

Options to Resolve This Adjustment

Accept the adjustment and the figures below

Adjustment £: £3.35

Hours: 0.25


Mark as Chargeable Adjustment to the Client

Reject the requested adjustment

Your Explanation:

Adjustment agreed

This message will be visible to the staff member through their work record.

 **Resolve**

View Rota Sign In Data Check In Data Wk Record

And further down the difference in cost and hours and the option to either accept the adjustment or reject it.

Note: You cannot amend the adjustment amount. This is because the adjustment has originated from the staff member. You can either accept it or reject it.

In the above example a staff member (Laura Atlas) has requested an adjustment because she says she stayed on late by 15 minutes. However, looking at the sign in / sign out data she appears to only have worked until 9 minutes later: -

Laura Atlas	09/11/2020 16:26:13	09/11/2020 20:09:13
-------------	---------------------	---------------------

Due to this I will reject this request stating this: -

Options to Resolve This Adjustment

Accept the adjustment and the figures below

Reject the requested adjustment

Your Explanation:

Sorry Laura, but you started late and you actually signed out just after 10pm so I can't accept this adjustment.

This message will be visible to the staff member through their work record.

Resolve

View Rota Sign In Data Check In Data Wk Record

I then press the Resolve button and the issue is rejected. The staff member will be able to see that message on their Work Record.

Viewing Resolved Issues

If you have resolved issues you can view them at any time by clicking the View button: -

Outstanding Issues:	384	Resolved Issues:	2
Potential Adjustment:	£ -4,444	Actual Adjustment:	£ 16

[View](#)

This shows the below screen: -

Issues that have been resolved...

Issues that have been resolved

Working Date	Issue Detail	Staff Member	Resolution	Hours/Money	Select All
02/11/2020	Sign In / Sign Out Issue: Early for Shift End Joan James finished early for their shift (10:00 - 16:00) by 120 minute(s) on the 02/11/2020	Joan James (Domestic)	Rejected	0.00 £0.00	<input type="checkbox"/>
05/11/2020	Sign In / Sign Out Issue: Late for Shift Start Christina Hughes arrived late for their shift (16:00 - 22:00) by 41 minute(s) on the 05/11/2020	Christina Hughes (Care Assistant)	Adjusted	-0.68 -£6.26	<input type="checkbox"/>

Remember, you can right click on a field and filter. [Cancel Selected Resolutions](#)

Record: 1 of 2

As you can see there are two issues detailed. One has been Rejected, and one has been Adjusted. At this stage you can right click and filter the list. You can select a Resolution and cancel them. Cancelling a Resolution will put the issue back into the Payroll System to be resolved again.

Exceptional Lines

You can add Exceptional Lines to your payroll. These are viewable in the detail screen: -

The screenshot shows the 'Payroll Manager' interface. At the top, there is a 'Manager Filter' dropdown set to 'All Managers', with 'Apply Filter' and 'Clear Filter' buttons. Below this, the 'Payroll Period' is 'November 2020' and the 'Payroll Cost' is '£36,195 -10.2%'. A table of payroll components is displayed:

Cost Per Day:	...	£1,206.49	-7.2%	Last Refresh:	09/12/2020 - 13:41:05
Holiday Pay:	...	£3,158.99	+72.9%	Period Dates:	27/10/20 to 25/11/20
Exceptional Lines:	...	-£6.26	0.0%	Locked Date:	25/11/2020
Pension Cost:	...	£414.70	-68.2%	Export Summary	
Mileage Pay:	...	£0.00	0.0%	Hide Detail	

Exceptional Lines can be made up of any manual entry. They also contain any adjustments made, rolled up by Staff Members. To view the Exceptional Lines just click the Green Button: -

Adjustment Records:

These adjustments rows are totalled based on the adjustments completed within the Payroll. You cannot amend the figures here, rather you need to amend each adjustment within the Payroll System.

Staff Member	Line Description	Amount	Hours
Christina Hughes	Payroll Adjustments	-£6.26	-0.68

Other Extra Lines:

Staff Member	Line Description	Amount	Hours	Recurring

At the top you will see the Adjustments. These cannot be amended on this screen. These are rolled up to a staff member and will appear as adjusted hours on the final payroll output.

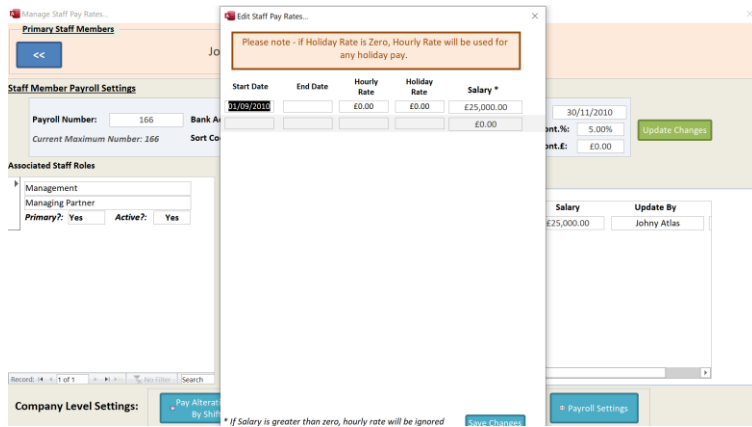
The bottom section contains any salary, recurring or single-entry lines.

Salary Entries

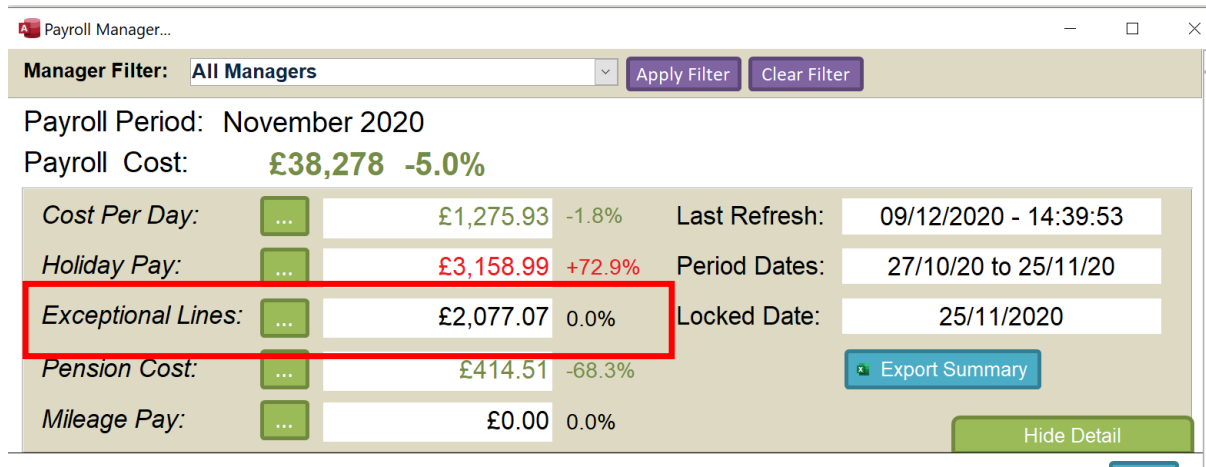
Salaries are maintained within the Manage Pay Rates Section. It is a very simple way of storing salary data by staff member. Any entry you place in here the system will automatically add the salary line the next time payroll is run: -

The screenshot shows the 'Edit Staff Pay Rates' dialog box. It features a table with the following columns: Start Date, End Date, Hourly Rate, Holiday Rate, and Salary *. The 'Salary *' column is highlighted with a red box and contains two rows of '£0.00'. A note at the top states: 'Please note - if Holiday Rate is Zero, Hourly Rate will be used for any holiday pay.' The dialog also includes a date field set to '28/10/2020' and an 'Update Changes' button.

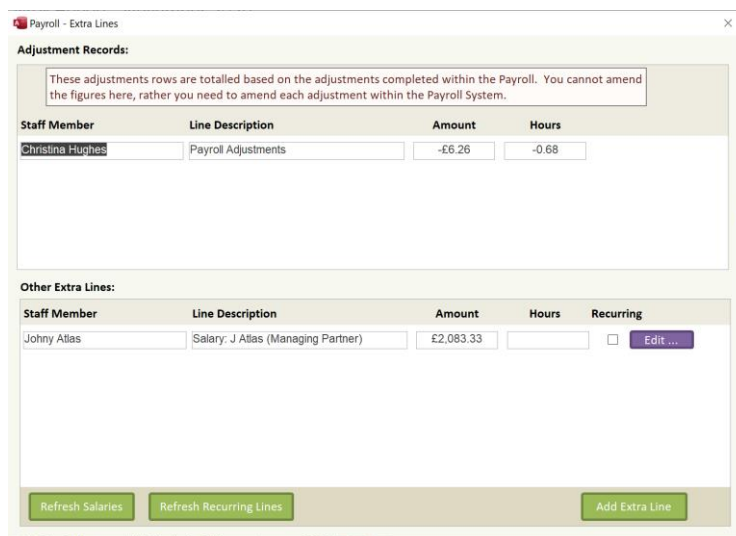
In this example we have set Johnny Atlas to have a yearly salary of £25,000 per year: -



When we load the payroll it now looks like this: -



When we go into the Exceptional Lines we will see the following: -



We can amend the salary line by clicking the Edit Button: -

The screenshot shows a web form titled "Add / Edit Payroll Extra Line...". It contains the following fields and controls:

- Staff Member:** A dropdown menu with "Johnny Atlas" selected.
- Line Description:** A text input field containing "Salary: J Atlas (Managing Partner)".
- Amount:** A text input field containing "£2,083.33".
- Number Hours:** A text input field containing "1.00".
- Exclude for Holiday Calculations:** An unchecked checkbox.
- Make it Recurring:** A red button.

At the bottom of the form, there are two green buttons: "Remove Entry" and "Save Changes".

Recurring Entries

You can create a Recurring Entry from this screen. When you Add an Extra Line the screen looks as follows: -

The screenshot shows the same "Add / Edit Payroll Extra Line..." form, but with the following differences:

- Staff Member:** The dropdown menu is empty.
- Line Description:** The text input field is empty.
- Amount:** The text input field is empty.
- Number Hours:** The text input field is empty.
- Exclude for Holiday Calculations:** An unchecked checkbox.
- Make it Recurring:** A red button.

At the bottom of the form, there is a single green button: "Save Changes".

An example could be that a staff member has borrowed £1,000 and wants to repay this at £100 per month. The recurring entry would look like this: -

Add / Edit Payroll Extra Line... ×

Staff Member: Clara Smith

Line Description: Staff Loan

Amount: -£100.00

Number Hours: 1.00

Exclude for Holiday Calculations:

Recurring Settings

Target Entries: Cancel Recurring

Number Remaining:

Created By:

Created Date:

Save Changes

Here we have set the target entries to five (for £500), four is the number remaining as the first repayment is happening now.

This will then appear as a separate line with the Recurring flag set: -

Other Extra Lines:

Staff Member	Line Description	Amount	Hours	Recurring	
Johnny Atlas	Salary: J Atlas (Managing Partner)	£1,800.00	1.00	<input type="checkbox"/>	Edit ...
Clara Smith	Staff Loan	-£100.00	1.00	<input checked="" type="checkbox"/>	Edit ...

Each time you finalise your payroll the number of recurring entries is decremented by one.

Mileage Pay

This version of Payroll includes full support for Mileage Pay. This includes pay for the actual miles that have been driven and also pay for the journey time.

Setting Up Mileage Pay

To use Mileage Pay you need to make sure the following is in place: -

1. You have identified and marked which staff members are “drivers”. This is done in the staff record: -

The screenshot shows the 'Manage Staff Records' interface for Miss Ellie Jones. The 'Driving Details' section is highlighted with a red circle. It contains the following information:

- Is this person a Driver?:
- Licence Expiry: 15/04/2026
- Business Car Insurance Expiry Date: 12/03/2021

Only staff members who are designated drivers can claim paid mileage.

2. The settings regarding mileage are configured: -

The screenshot shows the 'Mileage Settings' configuration page. The settings are as follows:

- Mileage - Journey Distance:** On (dropdown), 10000 (miles), £0.45 (Part 1 Rate), £0.25 (Part 2 Rate)
- Mileage - Journey Time:** On (dropdown), £0.00 (Rate)
- If Journey Rate is zero, the following rules applies: -*
- Journey Rate Rules:** PreviousShift (dropdown)
- Default Journey Start Location:** Head Office (dropdown)
- Default Journey End Location:** Head Office (dropdown)

These settings are: -

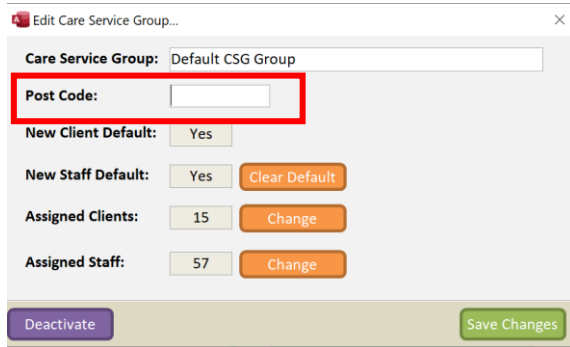
Mileage - Journey Distance:	Switch this on if you want the system to calculate the distance in miles between visit points.
-----------------------------	--

Mileage - Part 1 Limit (in miles):	This is the limit for the pay band for part 1. The default is 10,000 miles.
Mileage - Part 1 Rate:	The rate of pay per mile for part 1 miles.
Mileage - Part 2 Rate:	The rate of pay per mile for part 2 miles.
Mileage - Journey Time:	Switch this on if you want the system to calculate the time a journey should take between two visit points.
Mileage - Journey Rate: Journey Rate Rules:	The rate of pay per hour for the journey. If this value is zero the following rule is applied: - Options are: - Previous Visit Rate The rate of the starting visit is applied to the journey time. Next Visit Rate The rate of the ending visit is applied to the journey time. Average Visit Rate The average rate of the two visits is applied. Staff Standard Rate The standard hourly rate for that staff member.
Default Journey Start Location:	Options are: - Home Head Office First Visit
Default Journey End Location:	Options are: - Home Head Office First Visit

3. Visit data is loaded into Roster

Since the October release you can now mix both CSG and Service User visits. This is to enable supporting living users to put a “building” as a visit location which may contain a number of service users.

To support mileage pay for CSG visits you can now store a Post Code against the CSG: -



The screenshot shows a web form titled "Edit Care Service Group...". The form contains the following fields and controls:

- Care Service Group:** A dropdown menu currently showing "Default CSG Group".
- Post Code:** An empty text input field, which is highlighted with a red rectangular box.
- New Client Default:** A radio button labeled "Yes".
- New Staff Default:** A radio button labeled "Yes" and an orange "Clear Default" button.
- Assigned Clients:** A text input field containing the number "15" and an orange "Change" button.
- Assigned Staff:** A text input field containing the number "57" and an orange "Change" button.
- At the bottom left is a purple "Deactivate" button, and at the bottom right is a green "Save Changes" button.

Mileage Calculation

Care Control uses Google Maps to create an accurate mileage travel distance and time. When Payroll is run the system looks at all the visit information and breaks it up into two visit sections: - Start Post Code and End Post Code. This information is checked first against an internal table first, if it cannot find a match it will then go to Google to get the data and store this in your internal table.

Mileage Example

I have created a new CSG called Spring Lodge. At Spring Lodge we have four service users: -

The screenshot shows a dialog box titled "Edit Care Service Group...". It contains the following fields and buttons:

- Care Service Group:** Spring Lodge
- Post Code:** PL19 9AG
- New Client Default:** No (with a "Set as Default" button)
- New Staff Default:** No (with a "Set as Default" button)
- Assigned Clients:** 4 (with a "Change" button)
- Assigned Staff:** 38 (with a "Change" button)

At the bottom of the dialog, there are two buttons: "Deactivate" (purple) and "Save Changes" (green).

All staff can also work at Spring Lodge.

On the Roster we have a staff member called Miss Ellie Jones who is scheduled to visit Spring Lodge on a number of days: -

The screenshot shows a staff roster for Miss Ellie Jones (Care Assistant). The roles are listed as "Bank Care Assistant". The schedule is as follows:

Time Slot	Location
16:00 - 22:00	Evening Mixed (B) 4
08:00 - 16:00	Spring Lodge
08:00 - 16:00	Spring Lodge
08:00 - 16:00	Spring Lodge

Our mileage system is set up so that we pay for Ellie to travel to Spring Lodge from her Home Address and pay for her to return to her Home Address.

When we run the mileage as this is the first time of running, we get this warning as those mileage records will not exist and will need to be looked up in Google.

The screenshot shows the "Administration of Care Control" dashboard. At the top, there is a "65% Care Control Usage" indicator, a "Need Help?" button, and a "URGENT ISSUES" alert. The current user is identified as "Johny Atlas".

The dashboard is divided into several sections:

- Time and Attendance:** Roster System, Todays Rota, CC Biometric, BETA New Payroll - Try
- Absences:** Record Absence, Mileage Records Issue (with a warning message), Bradf
- Holidays:** Record Holiday
- Payroll:** Load Payroll, View Payroll Calendar, Manage Timesheets, Manage Pay Rates, Show Sign In / Sign Out Times

A warning message is displayed in the center: "Some of your mileage records have not matched. If you check back in a few minutes the system should have matched your records. If you get this message if returning after 5 minutes please let your manager know as you may have invalid postcode data." The message includes an "OK" button.

At the bottom of the dashboard, there are several navigation buttons: "Load Main System", "Show Care Plans", "Admin Dashboard", "Record Information", "Print Care Plan", "View Handover", and "Quit Care Control".

When the Payroll loads you will see a warning in the top right if you have mileage issues: -

The screenshot shows the Payroll Manager interface. At the top, there is a 'Manager Filter' dropdown set to 'All Managers' with 'Apply Filter' and 'Clear Filter' buttons. Below this, the 'Payroll Period' is 'November 2020' and the 'Payroll Cost' is '£38,100 -5.4%'. A red-bordered warning box in the top right corner contains the text 'Warning - Mileage Lookup Issues!'. To the right of the warning is a 'Show Detail' button. Below the summary, there are statistics: 'Outstanding Issues: 100', 'Resolved Issues: 3', 'Potential Adjustment: £ -4,656', and 'Actual Adjustment: £ -6'. A 'View' button is next to the 'Actual Adjustment'. At the bottom, there is a table with columns for dates, staff names, and amounts. The table has two rows visible: one for 06/11/2020 for Judith Thomas (Care Assistant) with a balance of -10.00 and a sign-in issue of -£196.20, and another for 25/11/2020 for Kim Smith (Care Assistant) with a balance of -10.00 and a sign-in issue of -£196.20. There are blue arrow buttons next to each row.

This warning means either: -

1. Google needs to match some records – check back in 5 minutes
2. You have invalid or missing postcodes – run the Mileage Lookup Exception Report

The fastest way to run the Mileage Lookup Exception Report is to click on the warning: -

This screenshot shows the same Payroll Manager interface as above, but with a dialog box open. The dialog box is titled 'Mileage Lookup Issues' and contains a yellow warning triangle icon. The text inside the dialog box reads: 'When the Payroll Generated, the system could not calculate all distances. Do you want to run the Mileage Lookup Exception Report?'. At the bottom of the dialog box, there are two buttons: 'Yes' and 'No'. The background of the screenshot is partially obscured by the dialog box, but the summary statistics and the top of the table are still visible.

If the Exception Report contains no records this means that Google has now matched the records and you can refresh your Payroll. To do that either shut the payroll down or press the Refresh Button at the bottom of the screen.

When you now look at the Payroll you will see this: -

<i>Cost Per Day:</i>	...	£1,270.25	-2.3%	Last Refresh:	09/12/2020 - 16:07:56
<i>Holiday Pay:</i>	...	£3,158.99	+72.9%	Period Dates:	27/10/20 to 25/11/20
<i>Exceptional Lines:</i>	...	£1,693.74	0.0%	Locked Date:	25/11/2020
<i>Pension Cost:</i>	...	£411.51	-68.5%	Export Summary	
<i>Mileage Pay:</i>	...	£7.16	0.0%	Hide Detail	

Clicking on the button next to the Mileage Pay will load the summary report: -

Report Analysis...

Report Category: << All Categories >> Report Name: Mileage Summary - Current Period [Run Report](#)

Description: The report shows a summary of the journey times and distance for all staff for the current payroll period. [Further Options](#) [Get Help](#)

Record ID	UserIndex	PayrollNumt	StaffMemb	NINumber	StaffRole	ManagersNa	WorkingDate	Journey	TotalDistanc	TotalTime
1	1	164	Ellie Jones	PJ370930C	Care Assistant		16/11/2020	PL19 9DP to PL	2.6	8
2	1	164	Ellie Jones	PJ370930C	Care Assistant		18/11/2020	PL19 9DP to PL	2.6	8
3	1	164	Ellie Jones	PJ370930C	Care Assistant		20/11/2020	PL19 9DP to PL	2.6	8

You also have a detailed report.

Refreshing Payroll Data

When you load the Payroll it does not reset or remove any issues that you have previously resolved. This allows you to return to the payroll at any time to continue to work on it. However, sometimes you may want to reset some areas. When you click on Refresh you will see the following screen: -

Refresh Payroll Data...

Refresh Payroll Data

Everytime you run the Payroll the data is refreshed, however some areas are created again unless you ask the system to do it.

Refresh Journey Calculations:

Refresh Exceptional Line Data:

If you refresh exceptional lines, any line entries you have entered or adjusted manually will be lost. Salary and agreed adjustments will automatically be repopulated.

Reset Resolved Issues / Adjustments:

Reset for a Specific Manager:

If you reset resolved issues, any issues you have resolved will be lost for this payroll period! This includes any adjustments that have been agreed. You can reset for just a specific manager if you want to, but be warned, basically you are starting again!

Refresh Payroll

Here you can choose to refresh any journey calculations (the default), clear and remove any exceptional extra lines and reset and resolved issues / adjustments.

If you choose to reset resolved issues you can also choose to reset for a specific manager.

Work Record

The Work Record is the replacement for the current timesheet. It is a document that is to be accessed by the staff to allow them to view their planned work for the current pay period and to propose adjustments.

This is a Beta Version. It is only currently assessable with CC Windows Administration. However, in January 2021 we will add the Work Record to CC Pocket and CC Mobile, as well as within CC Windows Staff Mode to allow staff full access.

When you access a Work Record the system will load the following screen: -

Work Record...

Johny Atlas Work Record - 27 October to 25 November 2020

Pay Period: November 2020 - Status:Locked

Change...

Hours Worked | Holiday Taken | Journeys | Adjustments

Days You Worked this Payroll Period:

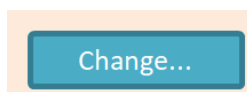
Date	Role	Shift	Allocation Detail	Hours
------	------	-------	-------------------	-------

Add Shift

Total Hours:

Email Me This Information | View Sign In / Sign Out Data | Show Estimated Pay

When you load this screen from Admin it will load the current user, in this case Johny Atlas. However, as Johny is also a Payroll Manager the Change button is shown: -



Note – this button is only ever shown if the user is a Payroll Manager.

When you click Change, you will see all the staff you are assigned (or all staff in the company)

Making an Adjustment

Staff can make an adjustment to a work record if they think there is an error. If we look at this work record for Gail James: -

Work Record...
Gail James Work Record - 27 October to 25 November 2020
Pay Period: November 2020 - Status:Locked

Hours Worked | Holiday Taken | Journeys | Adjustments

Days You Worked this Payroll Period:

Date	Role	Shift	Allocation Detail	Hours	Adjust
27/10/2020	Care Assistant	08:00 - 14:00	Allocation Group Days Group 2	6.00	Adjust
28/10/2020	Care Assistant	08:00 - 16:00	Allocation Group Days Group 2	8.00	Adjust
30/10/2020	Care Assistant	08:00 - 16:00	Allocation Group Days Group 1	8.00	Adjust
01/11/2020	Care Assistant	16:00 - 20:00	Allocation Group Evening Mixed (B) 4 Staff	4.00	Adjust
03/11/2020	Care Assistant	16:00 - 20:00	Allocation Group Evening Mixed (B) 4 Staff	4.00	Adjust
05/11/2020	Care Assistant	08:00 - 16:00	Allocation Group Days Group 1	8.00	Adjust

Add Shift | Total Hours: 131.00

Email Me This Information | View Sign In / Sign Out Data | Show Estimated Pay

Let us say that on the 1st November Gail stayed on at work for 15 minutes. She wants to request that this is adjusted. To do this she clicks on the Adjust button: -

01/11/2020	Care Assistant	16:00 - 20:00	Allocation Group Evening Mixed (B) 4 Staff	4.00	Adjust
------------	----------------	---------------	---	------	--------

You will then see the Hours Adjustment screen: -

Adjust Existing Hours... ×

Proposed Adjustment to Existing Hours

You can send proposed adjustments to your work record to your Payroll Manager. They will be notified if you send this proposed change. You can see on your Work Record if they grant or decline your proposed changes.

Current Shift / Hours	Your Proposed Shift / Hours Changes
Working Date: 01/11/2020	Working Date: 01/11/2020
Role: Care Assistant	Role: Care - Care Assistant
Shift: 16:00 - 20:00	Shift: 16:00 - 20:15 <small>Use this format: 14:00 - 18:00</small>
Shift Indicator:	Shift Indicator:
Allocation Type: Allocation Group	Allocation Type: Allocation Group
Allocation: Evening Mixed (B) 4 Staff	Allocation: Evening Mixed (B) 4 Staff
Total Hours: 4	Total Hours: 4.25

Or

Mark here to propose to Remove this shift

Why are you proposing this adjustment?:
I stayed on late as Maureen was late arriving.

Send Proposed Adjustment

Here Gail has adjusted the hours by 15 minutes and entered a reason for the adjustment below. Gail would then Send Proposed Adjustment.

When we then look at the Work Record, under the Adjustments Tab, you can see the adjustments that have been proposed: -

Work Record... - □ ×

Gail James Work Record - 27 October to 25 November 2020
Pay Period: November 2020 - Status:Locked Change...

Hours Worked Holiday Taken Journeys Adjustments

All the Adjustments made this Payroll Period:

Date	Adjustment Type	Proposed Hours	Status	Adjusted Hours / Money
01/11/2020	Amend Hours	4.25	Proposed	
Manager Response: <input type="text"/> View Detail...				

Total Adjusted:

Email Me This Information
View Sign In / Sign Out Data
Show Estimated Pay

When we go back to the Payroll System this proposed adjustment is shown for either agreement or rejection: -

Payroll Manager... - □ ×

Manager Filter: All Managers Apply Filter Clear Filter

Payroll Period: November 2020
 Payroll Cost: **£36,201 -10.1%** Show Detail

Outstanding Issues:	383	Resolved Issues:	0
Potential Adjustment:	£ -3,068	Actual Adjustment:	£ 0

View

Display System Issues Display Staff Issues

01/11/2020	Gail James (Care Assistant)	0.25	→
Staff Member Adjustment	Hours Adjustment	£2.30	

As you can see the 15 minutes of adjustment equals £2.30 of extra cost.

New Staff Fields

With this update we have included the following extra staff fields: -

Allergies / Medical Information

NHS Number:

GP Surgery:


GP Name:

Driving Details

Is this person a Driver?:

Licence Expiry:

Business Car Insurance Expiry Date:

 Manage Staff Records...

Active Staff Members

<<

Mrs Lorna Atlas

[Click for full staff list...](#)

>>

Need
Help?

Other Functions

Add New
Staff Member

Personal 1

Personal 2

Extra Info

COVID

Roles

Holidays

References

DBS

Disciplinary

Sup

Use this screen to update the status of any staff vaccinations with regards COVID. You can access a report on this information within the Analysis Reports area.

Vaccination Type:

First Vaccination Date:

Second Vaccination Date:

Notes or Comments:

Staff Manager Structure

As mentioned in the payroll changes, we have implemented a new manager field. This is in the Staff Record: -

Manage Staff Records...

Active Staff Members

<< Mrs Lorna Atlas >> [Click for full staff list...](#) **Need Help?** **Add New Staff Member**

Personal 1 Personal 2 Extra Info COVID Roles Holidays References DBS Disciplinary Supervision

Managers Name: No Manager

Name: Mrs Lorna Atlas

Address: 22 Atlas House

Any staff member can be a manager. Once created, a number of screens have been adjusted to support the new manager field, including: -

- Training
- Messages
- Sign In / Sign Out
- Holiday Requests

You will see at the bottom of these screens a new option to filter the records by “Your Team Only”: -

Staff Training Management...

Manage Staff Training

Tick Here to Only Show Your Team

Roster Changes

Linked to this change we have added a new setting in Roster to only show your team members when assigning shifts. The setting is called: -

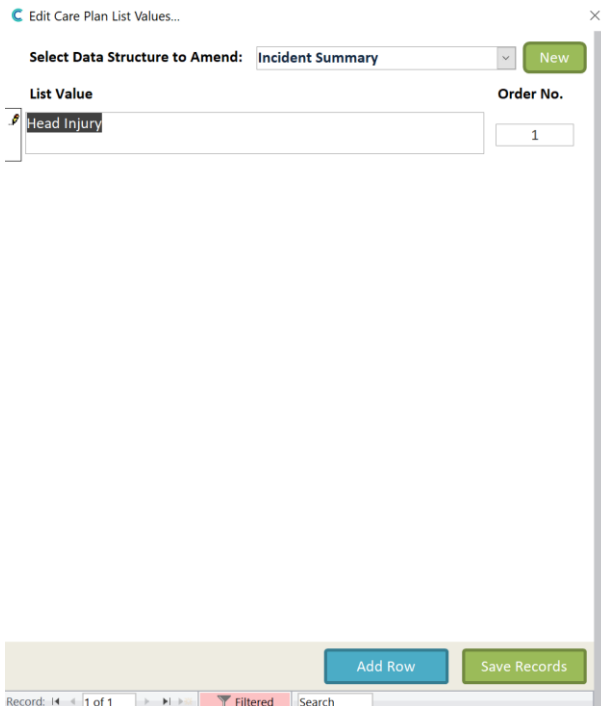
The screenshot shows a web application window titled "Your Care Control Roster Settings...". On the left is a navigation menu with the following items: "Welcome Screen", "Organisation Type", "Core Settings" (highlighted), "Staff Roles", "Holiday Settings", "Shift Templates", "Filter Sets", and "Security Access". The main content area is titled "Setting Details" and contains the following sections:

- Core Roster Settings**
 - Number of Rota Weeks: 4 Weeks
 - Rota Start Day: Sunday
 - Rota First Start Date: 26/09/2010
 - A red warning box states: "Changing any of these settings will affect any templates or rota's you have in your system. Only change these settings if you understand what the implications will be!"
 - Text below the warning: "This means that today is rota week: 2"
 - Staff Assignment Priority Option:** Team Members First - Other Staff Second (highlighted with a red box)
- Templates - Auto Processing etc**
 - Support Multi-Active Templates: No
 - Processing Frequency: Every Day
 - Maximum Future Target: 84 Days (with a note: "How far in advance do you want to be able to process your templates.")
- Settings Associated with Service Type**
 - Default Display View: By Staff Members

At the bottom of the window are three buttons: "View Help" (orange), "Cancel Changes" (blue), and "Save Changes" (blue).

Incident Summary Descriptions

In this update you can control the Incident Summary being shown if you want to. The setting is called Incidents_FixedList and is only available for Care Control to switch on. But if it is switched on then you can enter your own Summary Details through the Care Plan Comments screen: -



Medication Reports

We have added the following eMar reports to CC Windows: -

Title	Description
Administration - Full	The report shows the detailed administration (eMar) that has happened over the previous 56 days for all service users and all prescriptions.
Administration - Late	This report shows any medication administration that was administered late by 30 minutes or more over the previous 90 days.
Administration - Missed	This report shows the administration tasks that were missed over the previous 90 days.
Control Drugs - Active	This report shows the active controlled drugs assigned to active service users on your system.
Control Drugs - All	This report shows all the controlled drugs that have ever been assigned to any service users on your system.
Homely Remedy - Stock Levels	This report shows the current stock levels of all the active homely remedies in your system.
Medication - Admin Access	The report shows the detail of who was administering medication at a specific time, going back 180 days.
Medication - Audit	The report shows the audit information for all changes to the medication prescriptions, including any corrections that have been made.
Medication - Disposal	This report shows the medication that has been marked for disposal over the previous 28 days.
Medication - Ordering	This report shows active medication that needs to be reordered as the stock balance is not enough to cover a full delivery cycle.
Prescriptions - Active	This report shows medication details for all active prescriptions on your system.
Stock - Active	This report shows the current stock level for all active prescriptions.
Stock - Low	This report shows any active prescriptions that could run out of stock in the current stored schedule.

Other Reports

We have added a host of new reports to this update: -

Category	Title	Description
Alerts	Alerts - Detailed Analysis	The report shows the detail of the alerts that have been raised over the previous 90 days.
Care Planning	Movement - Bed / Turn Summary	The report shows a summary of the movements, specifically focussing on Bed and Turning, that have occurred over the previous 72 hours.
Care Planning	Movement - Detail Analysis	The report shows the detail of all movements that have been recorded over the previous 90 days.
Care Planning	Movement - General Summary	The report shows a summary of all movements that have been recorded over the previous 72 hours.
Payroll Reports	Adjustments - Current Period	This report shows the Adjustments requested, refused and agreed for the current period.
Payroll Reports	CSG Detail - Current Period	This report shows the CSG Detail for the current Payroll Period.
Payroll Reports	CSG Summary - Current Period	This report shows the CSG Summary Details for the current Payroll Period.
Payroll Reports	Current Issues - Current Period	This report displays all the issues raised by the Payroll System for the current period.
Payroll Reports	Detail - Current Period	This report displays the payroll detail for the current pay period.
Payroll Reports	Detailed Payroll Report - Current Period	This report shows the detail Payroll Report information for the current period.
Payroll Reports	Holidays - Current Period	This report displays all the holiday records for the current pay period.
Payroll Reports	Mileage Detail - Current Period	The report shows a detail of all journeys completed by staff including distance and time taken for the current payroll period.
Payroll Reports	Mileage Summary - Current Period	The report shows a summary of the journey times and distance for all staff for the current payroll period.
Payroll Reports	Pension Payments - Current Period	The report shows a breakdown of all the pensions payments for each qualifying staff member for the current period.
Payroll Reports	Summary by CSG - Current Period	This report shows the total hours and spend by CSG for the current period.
Staff Reports	Active Staff - All Fields	This report details all of the fields that are held for an active staff member.
Staff Reports	Active Staff - COVID Vaccine	This report details all staff who have started the COVID-19 Vaccination Programme.
Staff Reports	Active Staff - Medical Fields	This report details all active staff key medical fields including NHS Number, Surgery and Doctors Details.

Pocket Offline Support

We have added more support for pocket offline with a number of settings. These include: -

The screenshot displays the 'CC Pocket Settings' interface. On the left is a navigation menu with items like 'Videos and Images', 'QR Codes', 'Check Lists', 'Allocations', 'Document Library', 'Security', and 'CC Pocket Settings' (which is highlighted). The main content area is titled 'CC Pocket Home Page:' and includes a 'Support CSG Filtering:' dropdown set to 'No'. Below this is the 'Offline Working' section with several settings: 'Support Offline Working on Pocket Devices:' (No), 'Support Care Review Information Offline:' (Not supported), 'Level of Historic Offline Notes (In Hours):' (8 Hours), 'Maximum Roster Days to look in the future to synch data:' (3 Days), and 'Offline File Limit:' (200 Files). A 'View Help' button is at the bottom left. A 'Caution!' box on the right states: 'Using Offline Working will slow down your devices, as all data needs to be synched before the device can be used. Offline working means that you will not see if tasks have been completed until the data is uploaded. Setting a File Limit will stop very long synch times for Senior Staff Members'.

The objective of these settings is to try and ensure that offline working is efficient for staff who need to use it.

Have a play with these settings to find the right fit for your organisation.