

Care Control February 2021 – Part 2

CC Windows, Pocket & Mobile

Contents

Introduction by Matt Luckham	3
Systems Versions	3
Release Timetable	3
Background.....	3
Summary of the Changes	4
New Look and Appearance on some screens	5
Finalise Payroll Routine	7
Finalisation Process	9
CSG Screen Update	11
Edit CSG Screen	12
Service User Screen.....	13
Enhanced Template Rules Sets.....	15
Enhanced New Service User for Dom Care	18
Check In Alerts.....	20
Added Alert Support for Managers.....	21
Support for Extra Fields	22
Further Changes to Check In Feature on Pocket	22
Added Search and Filters on Key Screens.....	23
Default Shift Indicator on Service User.....	24
Shift Overlap Warning	25
Journey Time Warning	26
Add reason for change on rota changes.....	27

Introduction by Matt Luckham

Our second update in February 2021! This month we have added a number of changes to the Roster System and further support to Payroll. The systems we have updated are CC Windows, Pocket and Mobile.

Systems Versions

After this update you need to be using CC Windows 3.41, CC Pocket 2.17 and CC Mobile 4.48.

Release Timetable

We are planning on updating your databases on February 25th. The new apps will be available shortly after. CC Windows will automatically download.

Background

Continuing our work on the new Check In and Payroll functionality, we have added support to Finalise your Payroll in the update. We have also added new checks on forcing reasons for rota changes, checks on journey gaps versus visit gaps for our Dom Care clients and added more support with Pocket and Mobile.

You will also notice we have snazzed up the screens within CC Windows. I hope you like them!

Summary of the Changes


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

- **New Look and Appearance on some screens**
- **Finalise Payroll Routine**
- **CSG Screens Updated**
- **Enhanced Template Rules Sets**
- **Enhanced New Service User for Dom Care**
- **Check In Alerts**
- **Added Alert Support for Managers**
- **Support for Extra Fields**
- **Further Changes to Check In Feature on Pocket**
- **Added Search and Filters on Key Screens**
- **Default Shift Indicator on Service User**
- **Shift Overlap Warning**
- **Journey Time Warning**
- **Add reason for change on rota changes**
- **Service User Leaver Update**
- **Client Absence Updated**
- **Bug Fixes**


New Look and Appearance on some screens

You will notice that some of the screens with CC Windows have had a bit of “snazzing”. This is to bring this older system more in line with our other Apps: -

Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129 X



Administration of Care Control
70% Care Control Usage

Get Help  Urgent Issues

Current User: Johny Atlas

Common Options
Staff Area
Time & Attendance
Client Area
Income
Care Planning
Communication
Advanced Staff

Staff / Client Changes

- Add / Edit Staff Records
- Add a New Service User
- Staff File Integrity Checks

Care Planning

- Manage Monitoring
- Monitoring Analysis
- Care Plan Corrections
- Care Plan Integrity Checks

Time and Attendance

- Roster System
- Today's Rota
- Record Holiday
- Holiday Requests 1
- Record Absence


Communication Area

- Add / Amend Calendar Entry
- Create a Message
- View Your Messages
- Administer Messages
- Document Library
- Analysis Reports

Other


- Incident Analysis

Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129 X



Administration of Care Control
70% Care Control Usage

Current User: Johny Atlas

Get Help 

Adding Staff or Service User

- Add / Edit Staff Records
- Add a New Service User

Care Planning

- Manage Monitoring
- Monitoring Analysis
- Care Plan Corrections
- Care Plan Integrity Checks

Time & Attendance

- Roster System
- Today's Rota
- Record Holiday
- Record Absence

Communication Area

- Amend Calendar Entry
- Create a Message
- View Your Messages
- Administer Messages
- Document Library
- Analysis Reports

Other Areas

- Incident Analysis
- Holiday Requests 1

Home Status as at - 24/02/2021 12:58:14
View Status

Hours to Cover - Next 21 Days
View Today's Rota

24th 6 hrs	25th 8 hrs	26th 5 hrs	27th 8 hrs	28th 8 hrs	1st 0 hrs	2nd 6 hrs
3rd 6 hrs	4th 8 hrs	5th 0 hrs	6th 0 hrs	7th 0 hrs	8th 11 hrs	9th 8 hrs
10th 6 hrs	11th 7 hrs	12th 20 hrs	13th 18 hrs	14th 16 hrs	15th 6 hrs	16th 6 hrs

Your Recent Messages
View Your Message

For Information
Kelly Smith (20/02/2021)
Room 14's ring is in the safe as it keeps falling off her finger in case she asks where it is.

For Information
Christina Hughes (17/02/2021)
If anyone would like to donate to the residents comfort fund I have put a basket of wotnots in the staffroom to rummage through. cards keyrings etc so i can paint afresh when lockdown ends and have my stall again...take what you want but i would

Your Calendar for the next Two Weeks View Calendar

Today
(All Day) Birthday
Mrs Bonnie Hinnerk Birthday Today

Today
08:00 - 11:00 Chiroprapist
test event

Tomorrow
(All Day) Domestic Task

Previous 30 Days of Incidents View Incidents

1535
09/02 - 10:45
Fall in residents bedroom. (Mrs Polly Drake - Resident)

1534
03/02 - 13:40
A fall after standing at the dining room table (Loretta Smith - Staff)

1533
01/02 - 11:10
accident in residents bedroom (Mrs Vera Graham - Resident)

CURRENT OVERALL STATUS

Sign In Status 

Shift Allocation 









Service User Tasks 

Other Tasks 

Alerts 

Sign In / Sign Out Analysis






Show All Records

Staff Working Today	Signed In?	Signed Out?	Status
Madyson Lee (Bank Care Assistant)	<input type="checkbox"/>	<input type="checkbox"/>	
Madeline Wakefiled (Bank Care Assistant)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Dave West (Care Manager)	<input type="checkbox"/>	<input type="checkbox"/>	
Jean Smith (Cook)	<input type="checkbox"/>	<input type="checkbox"/>	
Debbie Thomas (Activities Co-Ordinator)	<input type="checkbox"/>	<input type="checkbox"/>	
Joan James (Domestic)	<input type="checkbox"/>	<input type="checkbox"/>	
Vanessa Thomas (Care Assistant)	<input type="checkbox"/>	<input type="checkbox"/>	
Claire Thomas (Care Assistant)	<input type="checkbox"/>	<input type="checkbox"/>	
Laura Atlas (Care Manager)	<input type="checkbox"/>	<input type="checkbox"/>	
Johny Atlas (Managing Partner)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Filter Your Results Set

Select Service User: Select CSG:
 Care Plan Area: What to Show?:

Update Results

Service User	Care Plan Area	Issue Level	Issue Detail
First Floor 15 - Polly Drake	Activities No Activities Recorded		No activities have been recorded in the last 7 days.
Ground Floor 4 - Bonnie Hinnerk	Care Notes Care Notes		No care note record for this service user in 24 hours.
Ground Floor 5 - Doreen Hache	Care Notes Care Notes		No care note record for this service user in 24 hours.
Ground Floor 6 - Issabel Jackson	Care Notes Care Notes		No care note record for this service user in 24 hours.
Ground Floor 6 - Issabel Jackson	Care Notes		No care note record for this service user in 48 hours.

Record: 1 of 126 Unfiltered Search


Get Help

Print Report

Finalise Payroll Routine

We have added support so you can now “Finalise” your payroll. You do this from the Draft Payroll Report. If you run the new Beta Payroll: -

Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129 X



Administration of Care Control
 70% Care Control Usage

Get Help
Urgent Issues

Current User:
 Johnny Atlas

Common Options
Staff Area
Time & Attendance
Client Area
Income
Care Planning
Communication
Advanced Staff

<p><u>Time and Attendance</u></p> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Roster System</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Todays Rota</div> <p><u>Biometrics</u></p> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">CC Biometric</div> <div style="border: 2px solid red; background-color: #27ae60; color: white; padding: 5px; margin-top: 10px; text-align: center;">BETA New Payroll - Try</div>	<p><u>Absences</u></p> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Record Absence</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Historic Absences</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Bradford Factor Analysis</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-top: 10px; text-align: center;">BETA Work Records - Try</div>	<p><u>Holidays</u></p> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Record Holiday</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Holiday Requests 1</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">View Staff Member Holiday</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Holiday Year Issues</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-top: 10px; text-align: center;">View Holiday Planner</div>	<p><u>Payroll</u></p> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Load Payroll</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">View Payroll Calendar</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Manage Timesheets</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px; text-align: center;">Manage Pay Rates</div> <div style="background-color: #27ae60; color: white; padding: 5px; margin-top: 10px; text-align: center;">Show Sign In / Sign Out Times</div>
---	--	---	---

Load Main System

Show Care Plans

Admin Dashboard

Record Information

Print Care Plan

View Handover

Quit Care Control

Payroll Manager...

Manager Filter: All Managers Apply Filter Clear Filter

Payroll Period: January 2021

Payroll Cost: **£44,161 +13.3%** Show Detail

Outstanding Issues:	152	Resolved Issues:	0
Potential Adjustment:	£ -4,812	Actual Adjustment:	£ 0

Display System Issues
 Display Staff Issues

01/01/2021	Lois Smith (Cook)	-8.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£153.60
01/01/2021	Dave West (Care Manager)	-6.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£135.00
25/12/2020	Kelly Smith (Care Manager)	-6.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£135.00
01/01/2021	Kelly Smith (Care Manager)	-6.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£135.00
01/01/2021	Debbie Thomas (Activities Co-Ordinator)	-6.25	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£115.00
01/01/2021	Gail James (Care Assistant)	-6.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£110.40
04/01/2021	Laura Atlas (Care Manager)	-8.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£107.20
12/01/2021	Laura Atlas (Care Manager)	-8.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£107.20
21/01/2021	Anastacia Low (Care Manager)	-10.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£98.10
17/01/2021	Naomi Marsden (Care Assistant)	-10.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£98.10
11/01/2021	Naomi Henry (Care Assistant)	-10.00	➔
Sign In / Sign Out Issues		No Sign Out for Shift	-£98.10

Record: 1 of 152 | Unfiltered | Search

Payroll Settings
Reports
Refresh Data

Run Draft Payroll >>

On the finalised report you can press the Finalise button: -

Draft Payroll Report for January 2021 Include / Exclude Hours on Report Export Data Change Grouping Finalise Payroll

PayrollNum	Title	FirstName	Surname	Role	NINumber	IsPrimary	Total Hours	Total Pay	Basic Hours	Basic Pay	Christmas	CM No
2	Mrs	Claire	Thomas	Care Assistant	WK540185D	True	117	1205.43	103	947.6	128.8	
12	Mrs	Laura	Atlas	Care Manager	YM265888C	True	184.5	2547.8	151	2023.4	214.4	
14	Mrs	Lorna	Atlas	Care Assistant	JE190596A	True	178.5	2124.4	157	1648.5	304.5	
15	Mrs	Jim	Simons	Care Assistant	NE992539B	True	100	981	0			
46	Mr	Olga	Smith	Domestic	JH503361B	True	107	1422.2	39	456.3	117	
46	Mr	Cathy	Jenkins	Maintenance		False	48	561.6	48	561.6		
63	Mrs	Vanessa	Thomas	Care Assistant	ZR184434B	True	115	1196	100	920	276	
69	Mr	Loretta	Smith	Domestic	NZ054356C	True	118	1144.89	82	721.6	88	
79	Miss	Regina	Thomas	Care Assistant	JR900479D	True	66	732.66	29	278.4	128.4	
84	Mrs	Kelly	Smith	Care Manager	JH652545B	True	170.5	2085.08	113.5	1276.88	135	
94	Mr	Stacy	Atlas	Registered Mar	JL781263D	True	12	2988.67	0	2820		
102	Mrs	Clara	Smith	Care Assistant	YW142764C	True	62.64	664.82	43	395.6	110.4	
102	Mrs	Gladys	Hughes	Cook		False	133.75	1365.6	125.25	1202.4	163.2	
105	Mrs	Debbie	Thomas	Activities Co-Ord	JE221606C	True	134.25	1323.88	125	1150	36.8	
117	Mrs	Kim	Smith	Care Assistant	JM266173B	True	11	202.4	0		202.4	
118	Ms	Cindy	Jones	Care Assistant	YW214914C	True	88.64	870.11	78.5	722.2	110.4	
124	Miss	Joan	James	Domestic	JW233253B	True	123	1144.15	98	862.4	105.6	
131	Mrs	Dawn	Harris	Care Assistant	NW247437B	True	67.5	700.18	20.5	188.6	147.2	
134	Miss	Gail	James	Care Assistant	PG914768A	True	58.5	622.66	47.5	437	73.6	
137	Miss	Annie	Thomas	Care Assistant	SS090713B	True	115	1062.52	109	1002.8		
141	Miss	Tina	Jenkins	Bank Care Assis	PC170936A	True	27.5	253	27.5	253		
142	Mr	Lois	Smith	Cook	SC396127D	True	58	625.75	49	470.4		
144	Mrs	Ruby	Hughes	Care Assistant	NY047794A	True	156.74	1599.36	106	975.2	110.4	
147	Mr	Daphne	Marsden	Care Assistant	YT001389D	True	117	1165.28	16	147.2		
150	Mrs	Christina	Hughes	Care Assistant	ME090692B	True	152.5	1489.71	144	1224.8	128	

You will see this message when the Finalisation Process has completed: -

mk	Title	FirstName	Surname	Role	NINumber	IsPrimary	Total Hours	Total Pay	Basic Hours
2	Mrs	Claire	Thomas	Care Assistant	WK540185D	True	117	1205.43	103
12	Mrs	Laura	Atlas	Care Manager	YM265888C	True	184.5	2547.8	151
14	Mrs	Lorna	Atlas	Care Assistant	JE190596A	True	178.5	2124.4	157
15	Mrs	Jim	Simons	Care Assistant	NE992539B	True	100	981	0
46	Mr	Olga	Smith	Domestic	JH503361B	True	107	1422.2	39
46	Mr	Cathy	Jenkins	Maintenance		False	48	561.6	48
63	Mrs	Vanessa	Thomas	Care Assistant	ZR184434B	True	115	1196	100
69	Mr	Loretta	Smith	Domestic	NZ054356C	True	118	1144.89	82
79	Miss	Regina	Thomas	Care Assistant	JR900479D	True	66	732.66	29
84	Mrs	Kelly	Smith	Care Manager	JH652545B	True	170.5	2085.08	113.5
94	Mr	Stacy	Atlas	Registered Mar	JL781263D	True	12	2988.67	0
102	Mrs	Clara	Smith	Care Assistant	YW142764C	True	62.64	664.82	43
102	Mrs	Gladys	Hughes	Cook		False	133.75	1365.6	125.25
105	Mrs	Debbie	Thomas	Activities Co-Ord	JE221606C	True	134.25	1323.88	125
117	Mrs	Kim	Smith	Care Assistant	JM266173B	True	11	202.4	0
118	Ms	Cindy	Jones	Care Assistant	YW214914C	True	88.64	870.11	78.5
124	Miss	Joan	James	Domestic	JW233253B	True	123	1144.15	98
131	Mrs	Dawn	Harris	Care Assistant	NW247437B	True	67.5	700.18	20.5
134	Miss	Gail	James	Care Assistant	PG914768A	True	58.5	622.66	47.5
137	Miss	Annie	Thomas	Care Assistant	SS090713B	True	115	1062.52	109
141	Miss	Tina	Jenkins	Bank Care Assis	PC170936A	True	27.5	253	27.5
142	Mr	Lois	Smith	Cook	SC396127D	True	58	625.75	49

Payroll Finalised

Your payroll has been finalised. You can access your finalised payroll reports from the Reports and Analysis Area.

OK

Finalisation Process

The finalisation process completes the following steps: -

1. Copy the summary payroll data for the period
2. Copy the adjustments payroll data for the period
3. Copy the issues payroll data for the period
4. Copy the holiday payroll data for the period
5. Copy the mileage payroll data for the period
6. Copy the pension payroll data for the period
7. Create Finalised Reports for all of these areas
8. Create Finalised Hours Reports
9. Remove any Mileage Lookup Errors for the Pay Period
10. Close the Pay Period

The reports generated with this process are accessible via the Analysis and Reports area: -

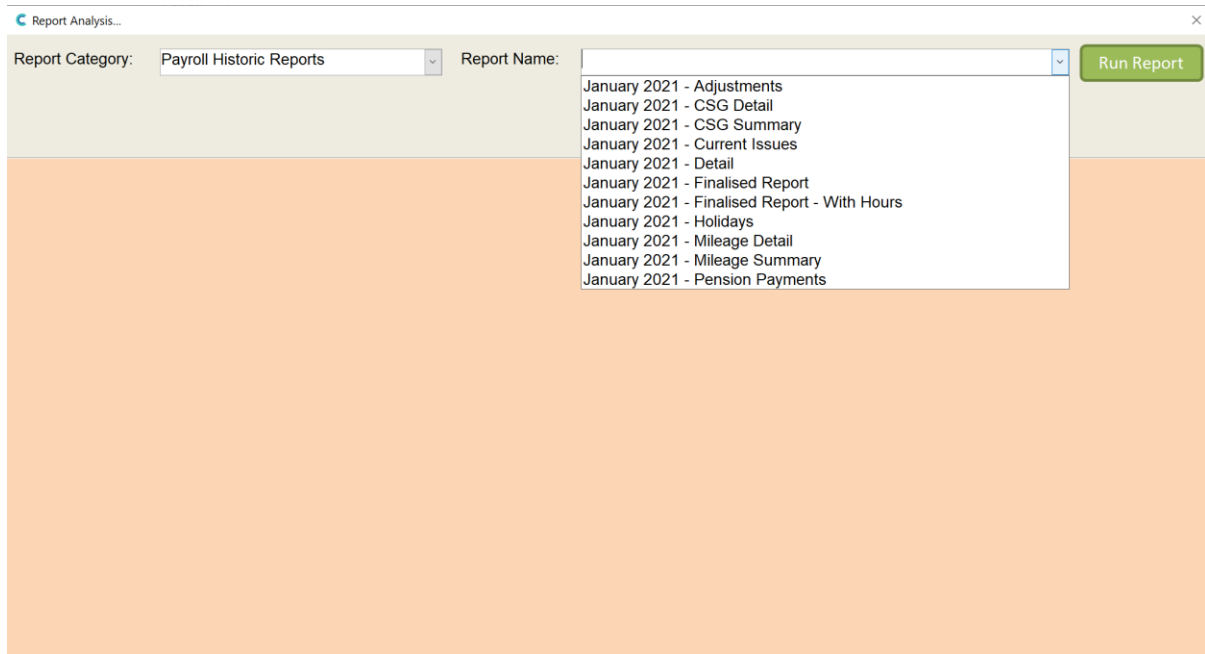
The screenshot displays the 'Administration of Care Control' software interface. At the top, the title bar reads 'Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129'. The main header includes the 'Administration of Care Control' logo with '70% Care Control Usage', a 'Get Help' button, an 'Urgent Issues' button, and the 'Current User: Johnny Atlas'.

The interface features a navigation bar with tabs: 'Common Options', 'Staff Area', 'Time & Attendance', 'Client Area', 'Income', 'Care Planning', 'Communication', and 'Advanced Staff'. Below this, the main content area is organized into four columns:

- Staff / Client Changes:** Add / Edit Staff Records, Add a New Service User, Staff File Integrity Checks.
- Care Planning:** Manage Monitoring, Monitoring Analysis, Care Plan Corrections, Care Plan Integrity Checks.
- Time and Attendance:** Roster System, Todays Rota, Record Holiday, Holiday Requests (with a yellow '1' icon), Record Absence.
- Communication Area:** Add / Amend Calendar Entry, Create a Message, View Your Messages, Administer Messages, Document Library, and Analysis Reports (highlighted with a red box).

An 'Other' section at the bottom left contains the 'Incident Analysis' button. A bottom toolbar includes icons for 'Load Main System', 'Show Care Plans', 'Admin Dashboard', 'Record Information', 'Print Care Plan', 'View Handover', and 'Quit Care Control'.

All historical payroll reports are under the report category of "Payroll Historical Reports": -



You will see them listed in Period order.

CSG Screen Update

The Care Service Group screens have been changed to include more functionality: -

Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129

Administration of Care Control
70% Care Control Usage

Get Help Urgent Issues Current User: Johnny Atlas

Common Options Staff Area Time & Attendance Client Area Income Care Planning Communication Advanced Staff

Adding / Removing Service Users Care Home Shop Print Resident Labels Home Care

Client Personal Accounts Other Options Enquiries / Pre-Assessments

Load Main System Show Care Plans Admin Dashboard Record Information Print Care Plan View Handover Quit Care Control

You will notice three tabs: -

Care Service Groups...

Care Service Groups By Service User By Active Staff

Active Only Deactive Only

CSG	No Serv Usrs	No Staff	Def Client	Def Staff
Buzza 1	1	1	No	No
Default CSG Group	14	58	Yes	Yes

Double Click a CSG to see Details Add CSG

Edit CSG Screen

Once you have created a CSG you can “Edit It” by double clicking the CSG Screen: -

Care Service Groups	By Service User	By Active Staff		
<input checked="" type="radio"/> Active Only <input type="radio"/> Deactive Only				
CSG	No Serv Usrs	No Staff	Def Client	Def Staff
Buzza 1	1	1	No	No
Default CSG Group	14	58	Yes	Yes

Double Click a CSG to see Details

[Add CSG](#)

Edit Care Service Group... ×

Care Service Group:

Post Code: [Geocode CSG](#)

Latitude:

Longitude: [View On Map](#)

New Client Default: [Set as Default](#)

New Staff Default: [Set as Default](#)

Assigned Clients: [Change](#)

Assigned Staff: [Change](#)

[Deactivate](#) [Save Changes](#)

We have added Geocode Support for CSG's. You can Geocode an entry by entering a Post Code and select Geocode CSG.

Care Service Group:

Post Code:

Latitude:

Longitude:

New Client Default:

New Staff Default:

Assigned Clients:

Assigned Staff:

This information can be used when we compare Check In / Check Out against a CSG Allocation.

Service User Screen

Search :

- Jim Simons - Ground Floor 1
- Amanda Langhorn - Ground Floor 2
- Betty Hasel - Ground Floor 3
- Bonnie Hinnerk - Ground Floor 4
- Doreen Hache - Ground Floor 5
- Issabel Jackson - Ground Floor 6
- Frank Jones - Ground Floor 7
- Emma Smith - First Floor 8
- Eve Gieves - First Floor 9
- Esther Goulding - First Floor 10
- Leah Gallyon - First Floor 11
- Lisa Dovey - First Floor 12
- Lorna Daber - First Floor 13
- Laura Derby - First Floor 14
- Polly Drake - First Floor 15

Care Service Group:

On the service user screen you can check and update the CSG for a given Service User. You can search for a Service User using the Search Field.

Care Service Groups
By Service User
By Active Staff

Search :

Johnny Atlas

Laura Atlas

Stacy Atlas

Lorna Atlas

Dawn Harris

Diana Harris

Naomi Henry

Ruby Hughes

Christina Hughes

Joan James

Tina Jenkins

Geraldine Jones

Ellie Jones

Cindy Jones

Madyson Lee

Holly Low

Maris Lyons

Naomi Marsden

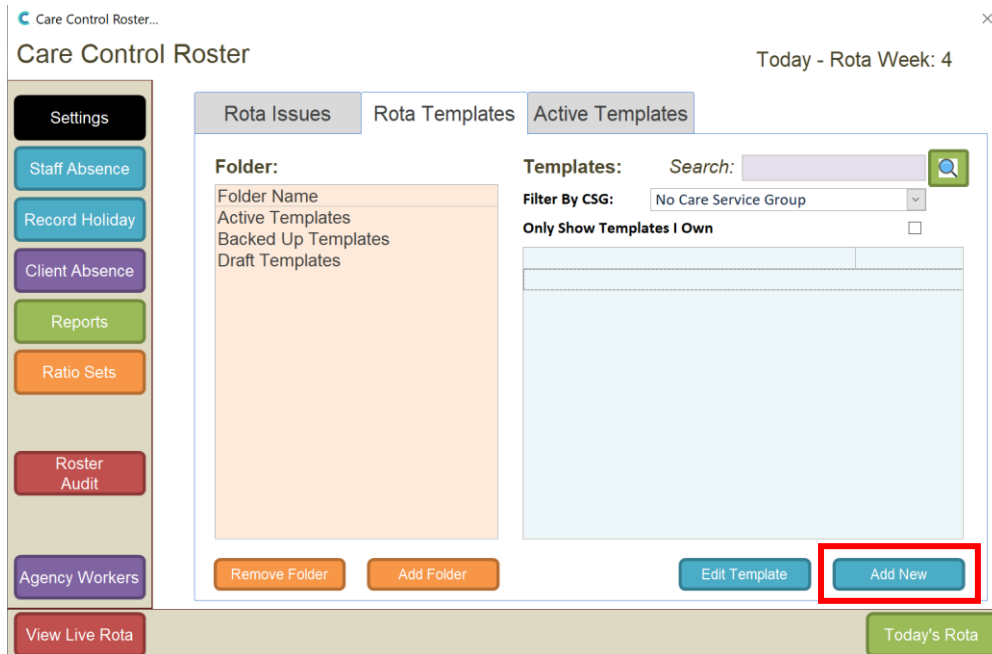
Assigned Care Service Groups:

Add a Care Service Group:

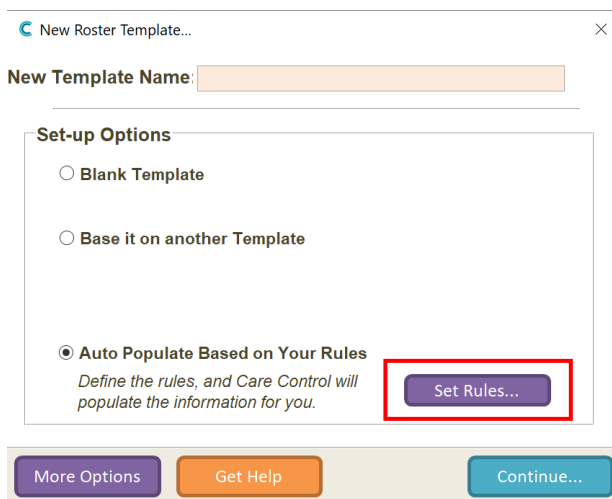
Similarly, on the By Active Staff screen you can view which CSG's a staff member is assigned. You can remove and add a CSG on this screen also.

Enhanced Template Rules Sets

The Template Rules area allows you to quickly create a Roster Rota Template based on a set of rules. We have added more support to this area to make it easier to create a more detailed Template: -



When you Add a New Template, you have the following options: -



Define Template Rules... ×

Saved Rules Sets:

Staff Member or Role:	Weekday	Shift or Shift Template	Number
<input type="text"/>	(All Days)	<input type="text"/>	0

Save Rules Set Continue...

You will see you can now add a Role or a Staff Member and now enter a Shift or select a Shift Template: -

Define Template Rules... ×

Saved Rules Sets:

Staff Member or Role:	Weekday	Shift or Shift Template	Number
Role:Care Assistant	Monday	08:00 - 16:00	3
Role:Care Assistant	Wednesday	08:00 - 14:00	2
Jean Smith (Cook)	Monday	08:00 - 17:00	1
Jean Smith (Cook)	Tuesday	08:00 - 17:00	1
Jean Smith (Cook)	Wednesday	08:00 - 17:00	1
Jean Smith (Cook)	Thursday	08:00 - 17:00	1
Jean Smith (Cook)	Friday	08:00 - 17:00	1
	(All Days)		0

Save Rules Set Continue...

In the above example we will create a rota template with a mixture of shifts assigned to roles and individual staff members. Note, you can also Save this Rule Set to access again.

Template Name:

Auto Process: Off



Change View:

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Roles for: Cook							
+ J Smith (Cook) <small>Role: Cook</small>	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00	08:00 - 17:00		
Roles for: Care Assistant							
+ Role: Care Assistant	08:00 - 16:00		08:00 - 14:00				
+	08:00 - 16:00		08:00 - 14:00				
+	08:00 - 16:00						

Your Template Statistics

Total Hours by Category	
Care	144.00
Cook	180.00

Total Hours by Week	
Week 1	81.00
Week 2	81.00
Week 3	81.00
Week 4	81.00

Total Hours by Role	
Care Assistant	144.00
Cook	180.00

Hours by Week, by Category		
Week 1	Care	36.00
Week 1	Cook	45.00
Week 2	Care	36.00
Week 2	Cook	45.00
Week 3	Care	36.00
Week 3	Cook	45.00
Week 4	Care	36.00
Week 4	Cook	45.00

Enhanced New Service User for Dom Care

We have enhanced the Home Care New Service User Screen. This screen is only showed if you are adding a service user of Type Home Care: -

Enter new client details... ×

Type: Home Care

Title:

Forename:

Surname:

Gender:

DOB:

Care Service Group: Default CSG Group

Reference:

Reference 2: **Suffix:**

Client Address:

Post Code: :Geocode After Save

Visit Start Date:

Visit Template:

New Template Name:

Auto Process On:

Changes include: -

1. If you enter a Client Address it is automatically Geocoded.
2. You can build a new Roster Template when you add a Service User: -

Enter new client details... ×

Type: Home Care

Title:

Forename:

Surname:

Gender:

DOB:

Care Service Group: Default CSG Group

Reference:

Reference 2: **Suffix:**

Client Address:

Post Code: **:Geocode After Save**

Visit Start Date:

Visit Template:

New Template Name: << Build New Template >>
2021 changes
Buzza 1
Care Manager Role
Charmain and Jay Starting

Auto Process On:

This allows you to create a template at the time that a client is added to your organisation.

Check In Alerts

We have added the following Check In / Check Out Alerts: -

Alert	Description
Alert me if a Check In is late.	Alert me if a Check In is late by %minutes% minutes from the planned Check In time.
Alert me if a Check Out is late.	Alert me if a Check Out is late by %minutes% minutes from the planned Check Out time.
Alert me if a Check Out is early.	Alert me if a Check Out is early by %minutes% minutes from the planned Check Out time.
Alert me if a Check In is missed.	Alert me if a Check In is missed. Only include Check Ins that should have been completed with
Alert me if a Check In is outside a range.	Alert me if a Check In is %distance% metres away from the Check In target location.
Alert me if a Check Out is outside a range.	Alert me if a Check Out is %distance% metres away from the Check Out target location.

Access these Alerts in the normal way: -

Care Control Administration - Atlas House Care Home - Windows System Version: 3.39.2129

Administration of Care Control
70% Care Control Usage

Get Help Urgent Issues

Current User: Johnny Atlas

Common Options | Staff Area | Time & Attendance | Client Area | Income | Care Planning | Communication | Advanced Staff

Monitoring & Alerts

- Manage Monitoring
- Monitoring Types
- Monitoring Analysis
- Alerts and Notifications**
- Make Amendments
- Care Plan Corrections

Care Plan Notes

- Set Note Filter Exclusions
- Shortcut Notes
- View Managers Scratch Pad
- Life History Configuration**
- Life History Questions
- Life History Sections

Risk Assessments & Care Reviews

- Generic Risk Assessments
- Care Review Domains
- Capacity & Consents**
- Mental Capacity Templates
- Consent Templates

Cost of Care Analysis

- Dependency / Cost of Care
- Analysis & Configuration**
- Care Plan Integrity Checks
- Care Note Analysis
- Analysis Reports
- Care Planning Comments

Load Main System | Show Care Plans | Admin Dashboard | Record Information | Print Care Plan | View Handover | Quit Care Control

Added Alert Support for Managers

Some of the Alerts have a new field that you can tick, so that if the Alert fires, the staff member's manager is notified: -

The screenshot shows a web form titled "Create / Amend Alert...". It is divided into three steps:

- Step 1 - Select Your Alert Template:** Includes dropdowns for "Select Category" (Management), "Select Sub Category" (Rota), "Alert Detail" (Alert me if a Check In is late.), and a text area for "Alert Wording" (Alert me if a Check In is late by 60 minutes from the planned Check In time.).
- Step 2 - Fill in Alert Parameters:** Contains a table for parameters and a "Parameter Details" section.

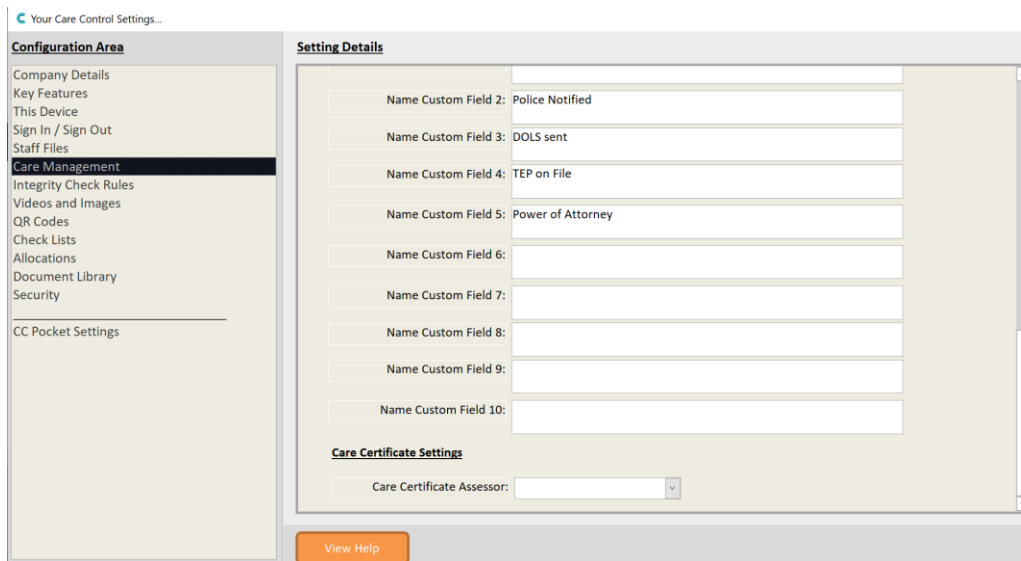
Name	Value
Minutes	60

The "Parameter Details" section shows "Name: Minutes" and "Your Value: 60" with a description "The number of minutes." and an "Update" button.
- Step 3 - Who is getting the Alert?:** Includes a "Message Group" dropdown (set to "<< Please Select >>"), a "Show on Home Status" checkbox (unchecked), and a new "Alert Staff Manager:" checkbox (checked). A "Save" button is at the bottom right.

In this example we are creating a Check In Alert which will fire if the staff member is 60 minutes late for a Check In. We have ticked the Alert Staff Manager field, which means that the manager of the staff member will be notified.

Support for Extra Fields

The previous release allowed you to create an extra 5 custom fields and added three new fields on Personal Details for Home Care Service Users: -



These fields are not visible on the latest version of Pocket (2.17) and Mobile (4.48).

Further Changes to Check In Feature on Pocket

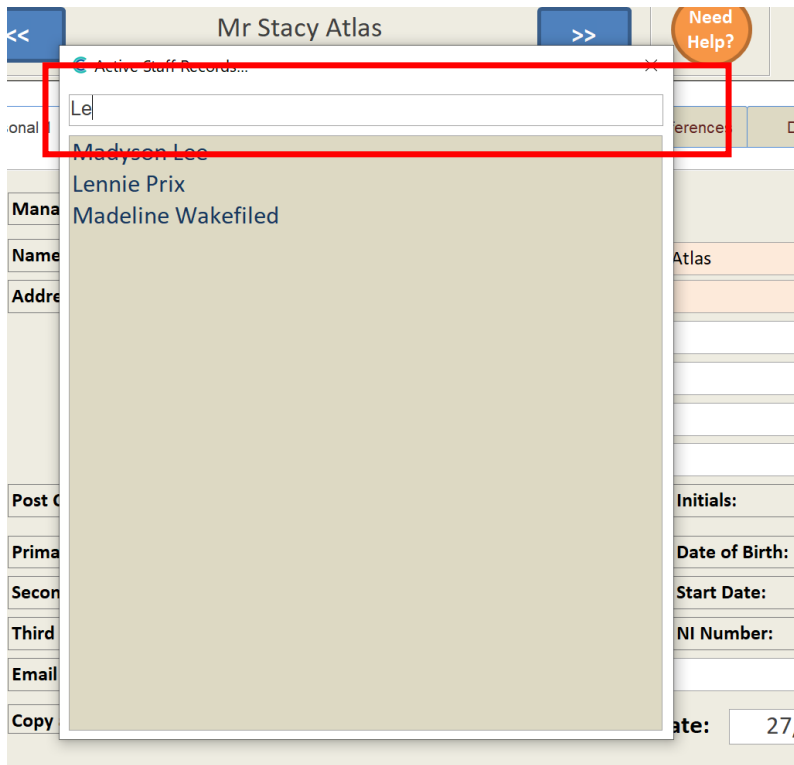
We have added further enhancements to the Check In / Check Out feature on Pocket which makes the version in Pocket 2.17 more robust for devices where location services may be switched off.

The Check In feature has been tested with devices in Airplane Mode and Offline Mode.

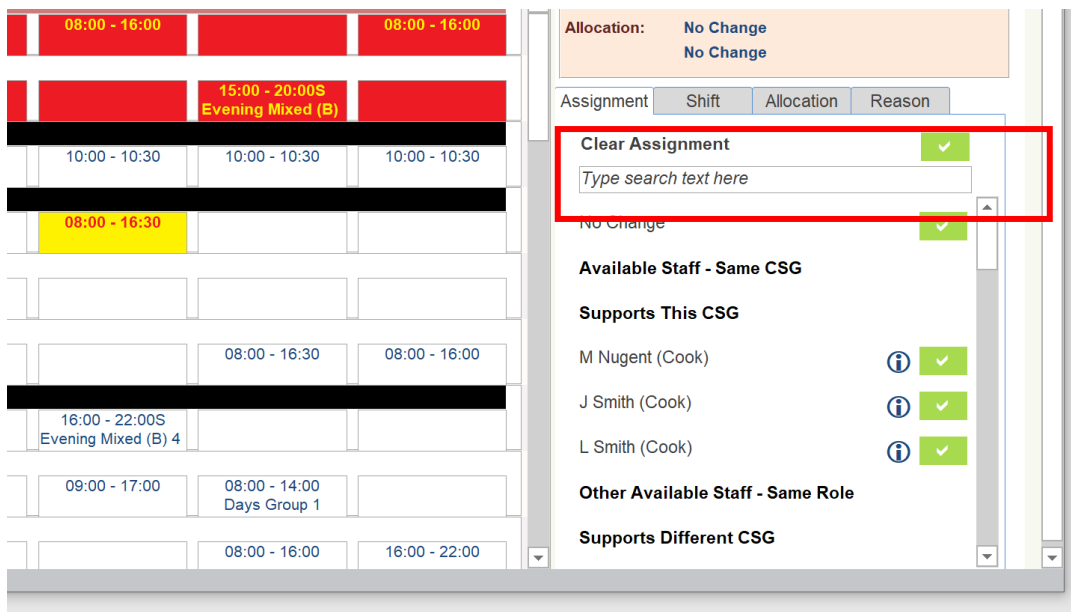
We ask that if you are using this feature that you move all your staff to Pocket 2.17.

Added Search and Filters on Key Screens

We have added more search and filter options to more screens on CC Windows. These include: -



Staff selection screen.



Smart Board for Assignments or Allocations.

Default Shift Indicator on Service User

For a Home Care Type Service user you have a new field called Default Shift Indicator within the Personal Details screen: -

The screenshot shows the 'Active Service Users' interface for Jim Simons. The top navigation bar includes 'Active Service Users', 'Jim Simons - Ground Floor 1', 'DOB: 06/11/1924', 'DOA 01/11/2007', and a 'Click to Change Record' button. The main form is divided into several sections: 'Personal Appearance' (with a photo of Jim Simons and fields for Height: 147, Eye Colour: Green, Hair Colour: gre/white, Build: Small, Hair Length: Medium, Eye Wear: Glasses, Hearing Aid: None, Weight on Admission: 56.9), 'Historical Details' (Maiden Name, Previous Occupation: Farmers Wife), and 'Further Information' (NHS Number: 6047118364). The 'Domicillary Details' section includes 'Current Address', 'Post Code', and 'Key Safe Number'. The 'Shift Indicator' field is highlighted with a red box. Other fields include 'Treatment Guide: DO NOT Resuscitate', 'Allergies: Penicillin', 'Special Dietary Needs: none', 'Religious Preferences: C of E', 'After Death Preferences: Burial', 'Preferred Sex of Carer: Female', 'Primary Carer: Anastacia Low - Care Manager', 'Doctors Surgery', 'GP', 'Mental Health Doctor', 'Funeral Director: Norman Lock and Son', and 'Nationality: British'. The 'Allocation Group' is set to 'Singles (A2)'.

If you set this field to a value, any shifts added to your rota that are allocated to this service user will be appended with this Shift Indicator as long as the shift being added does not already have a Shift Indicator.

Use this feature to help ensure that the correct payroll treatment is applied for any staff who look after specific clients.

Shift Overlap Warning

We have added a new warning that if a shift is added on the rota assigned to the same staff member (or a role of that staff member) that overlaps another shift, you will receive a warning that will prevent you from saving the shift: -

The screenshot shows the 'Daily View of Live Rota' for Week 4, Wednesday, 24 February 2021. The interface is divided into two main sections. On the left, a list of roles and their assigned shifts is displayed. On the right, the 'Add Additional Hours' dialog is open, showing a selected shift of 15:00 - 17:00 (2) and an assignment to 'M Wakefiled (BCA) 0/0 Hours'. Below this, a table shows the allocation and reason for the shift, with a warning icon next to the 'User Defined' entry.

Assignment	Shift	Allocation	Reason
No Change			✓
User Defined			✓
Predefined Shifts			
	sdfsdf - 10:00 - 14:00 (4)		✓
	15:00 - 17:00; (2)		✓

In this example we are trying to add a shift to our live rota (15:00 – 17:00) which overlaps an existing shift (08:00 – 16:00). When we press Process we get the following warning: -

Overlap Shift Issue



Overlap Shift Issue

The shift (15:00 - 17:00) you are trying to assign to Madeline Wakefiled would overlap with another shift they are already assigned.

The assignment cannot proceed.

Close

Journey Time Warning

There is a new Roster Setting called Enforce Journey Time Check: -

Setting Details

Core Roster Settings

Number of Rota Weeks: 4 Weeks

Rota Start Day: Sunday

Rota First Start Date: 26/09/2010

This means that today is rota week: 4

Staff Assignment Priority Option: CSG Staff First - Other Staff Second

Force a Reason on ALL Rota Changes: No

Display Chargeable Change Option: No

Enforce Journey Time Check: Yes

Display Shift Overlap Warning: Yes

Templates - Auto Processing etc

View Help Cancel Changes Save Changes

When this is switched on (it is off by default), any shifts added or updated that have a service user or CSG allocated, the system will check that the gap between visits is long enough to support the journey time between those visits.

In this example a staff member (J Atlas) has a visit to a client (J Simmons) at 11.00am which is planned to last until 11.30am. We are then trying to add another visit to (A Langhorn) at 12:00pm. As the distance between J Simmons and A Langhorn has a travel time of 55 minutes, but the time gap between the visits is only 30 minutes, you will receive this warning:

Journey Travel Time Issue

A visit planned (Jim Simons, PL19 9AG, 11:00 - 11:30M) immediately before this visit would result in a travel time of 55 minutes. This is more than the time gap, plus any allowed tolerance (30 minutes), for the start of this shift (12:00 - 12:30).

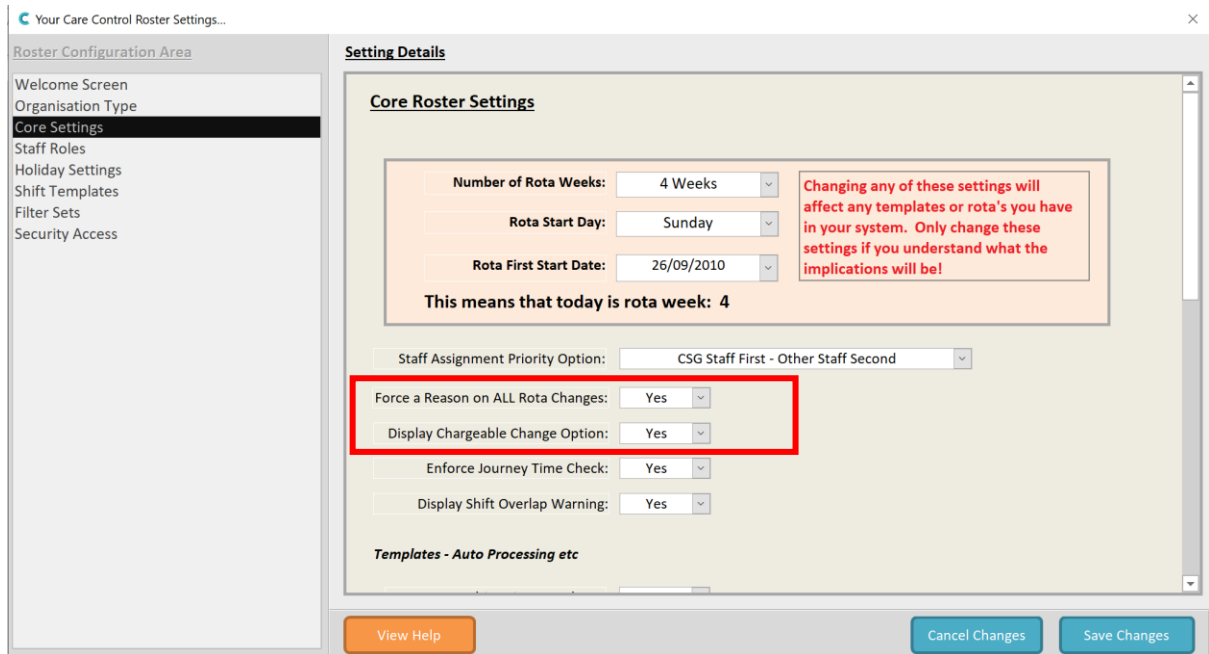
The assignment cannot proceed.

Close

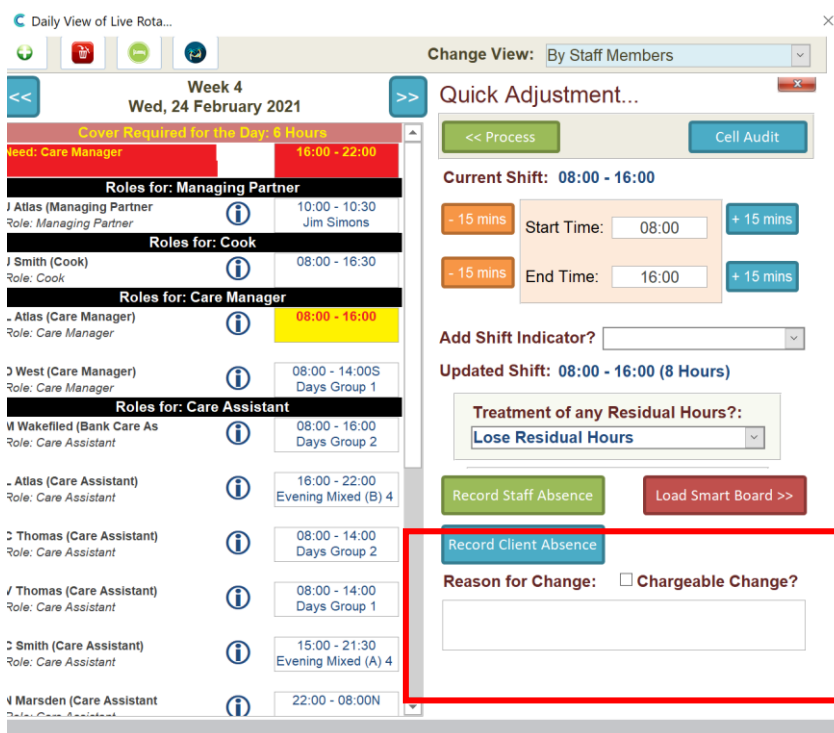
The system will not allow you to enter this visit.

Add reason for change on rota changes

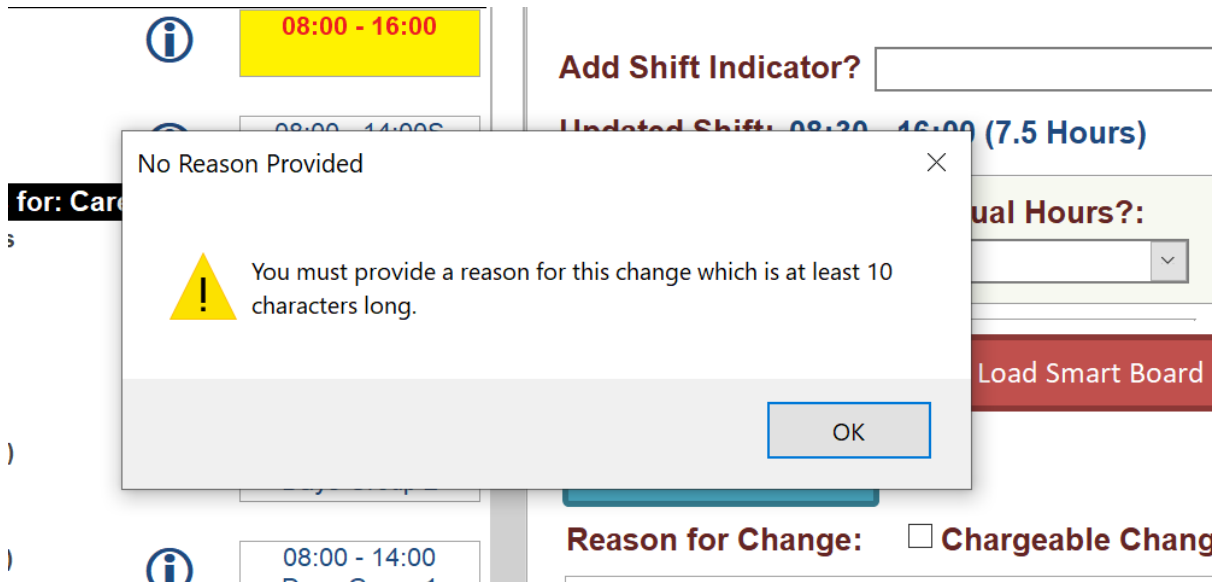
There are two further settings added to the Roster System: -



The first is a setting which will force any changes to the Live Rota, that the user must enter a Reason for that change: -



If you try and make a change you will be prompted to enter a reason: -



Any reason entered can be viewed on the Cell Audit: -

Changed Date	Changed By	Change Action	Week Info.	Rota Details	Assigned	AllocName	General Comments
24/02/2021 - 14:42:30	Johnny Atlas	UPDATE - INSERT	24/02/2021 4	08:30 - 16:00 08:30 - 16:00	Laura Atlas	No Allocation	Staff member called in and said they would be late.
24/02/2021 - 14:42:30	Johnny Atlas	DELETE	24/02/2021 4	08:00 - 16:00 08:00 - 16:00	Laura Atlas	No Allocation	
31/12/2020 - 10:09:41	Johnny Atlas	UPDATE - INSERT	24/02/2021 4	08:00 - 16:00 08:00 - 16:00	Laura Atlas	No Allocation	

There is also a “Chargeable Change” option which you can set on the Roster Settings. If this is set you will see this option on the Reason Screen: -

Chargeable Change?

This sets a field on the Rota which can be used for reporting purposes. You can also see this field if it is set on the Cell Audit.