# Care Control February 2021 – Part 2
# CC Windows, Pocket & Mobile

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## 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!

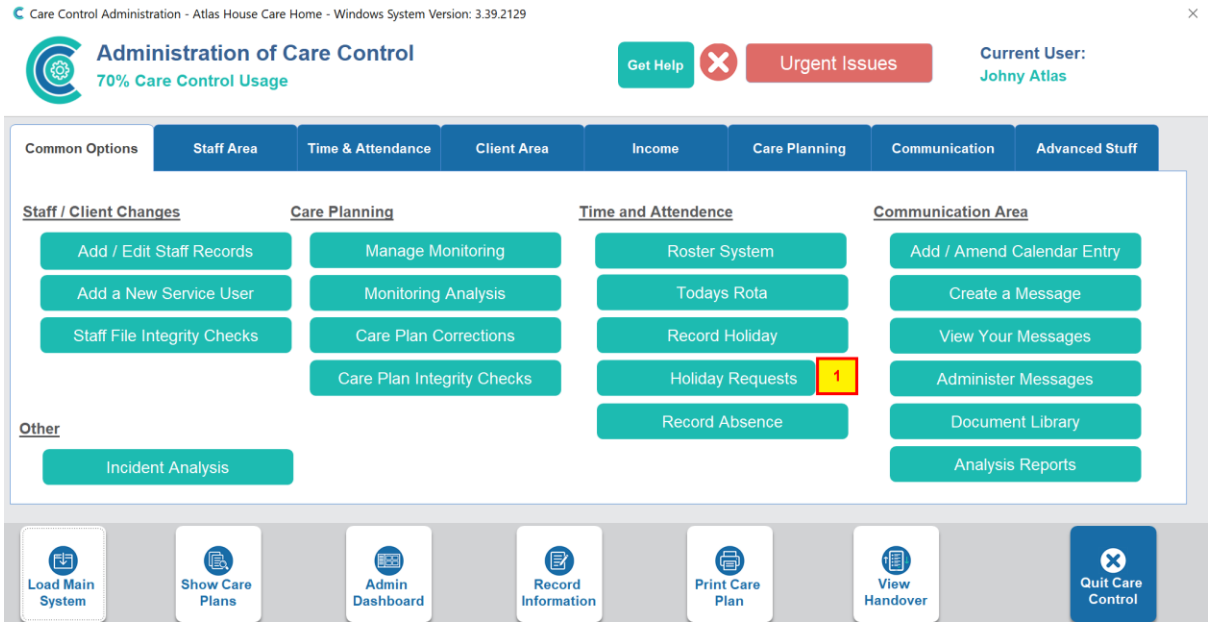
## Summary of the Changes

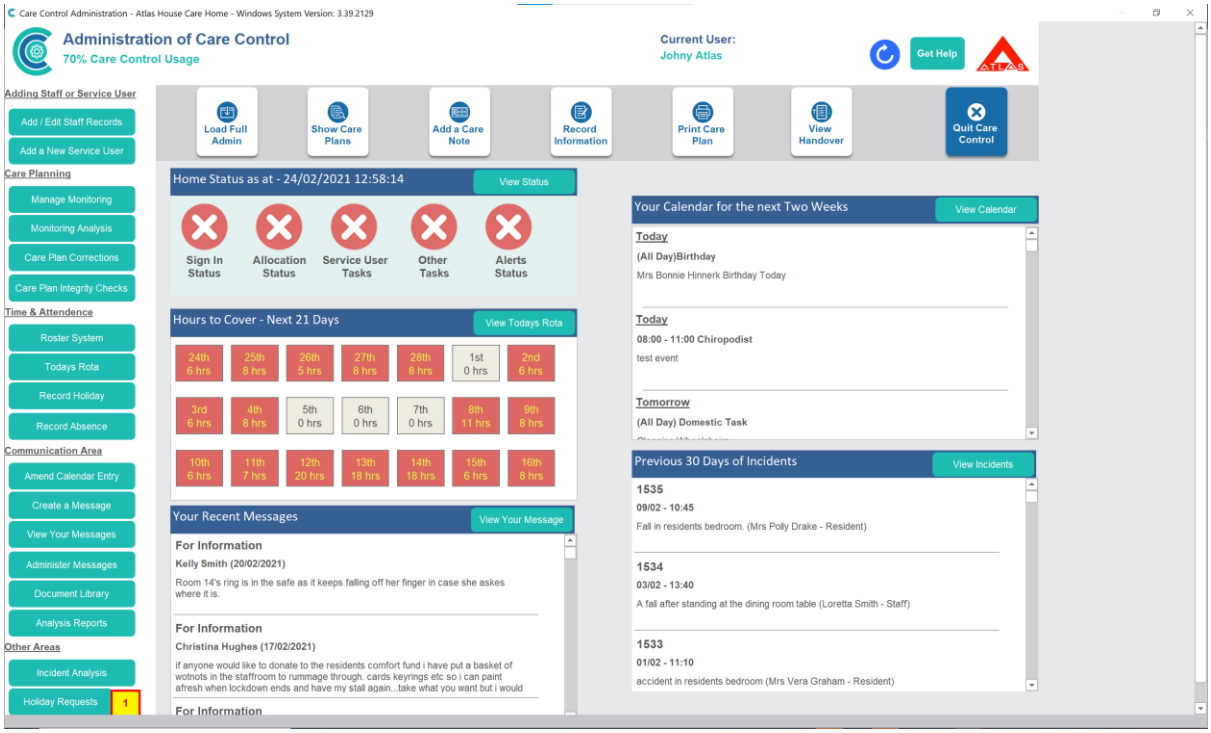
The following is a list of the changes included in this release: -

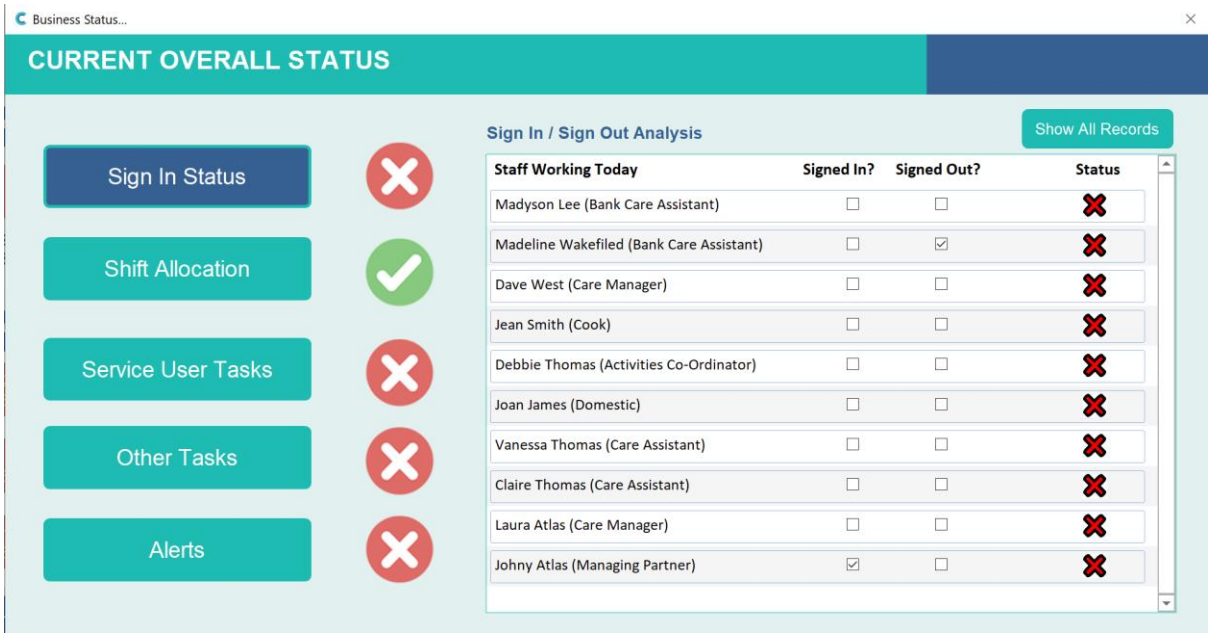
- **New Look and Appearance on some screens**
- **Finalise Payroll Routine**
- **CSG Screens Updated**
- **Enhanced Template Rules Sets**
- **Enhanced New Service User for Dom Care**
- **Check In Alerts**
- **Added Alert Support for Managers**
- **Support for Extra Fields**
- **Further Changes to Check 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**

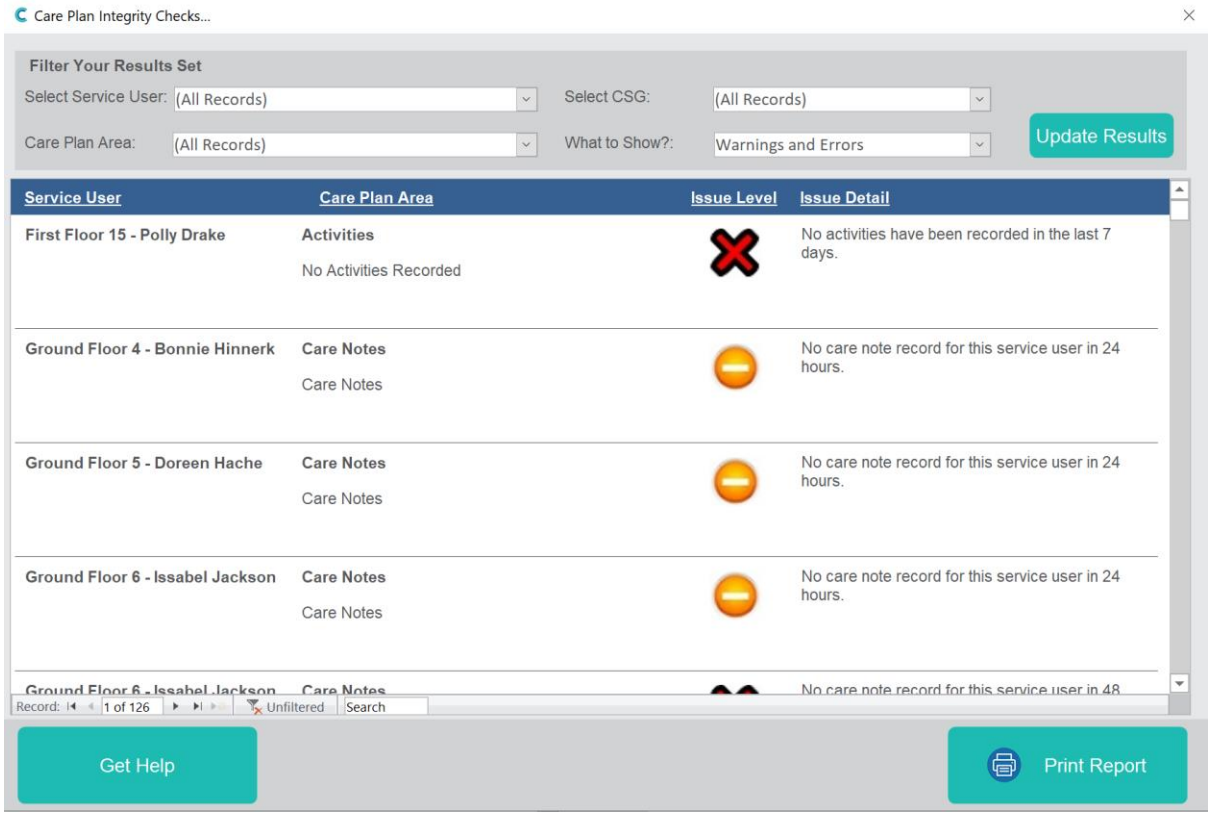
# New Look and Appearance on some screens

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: -



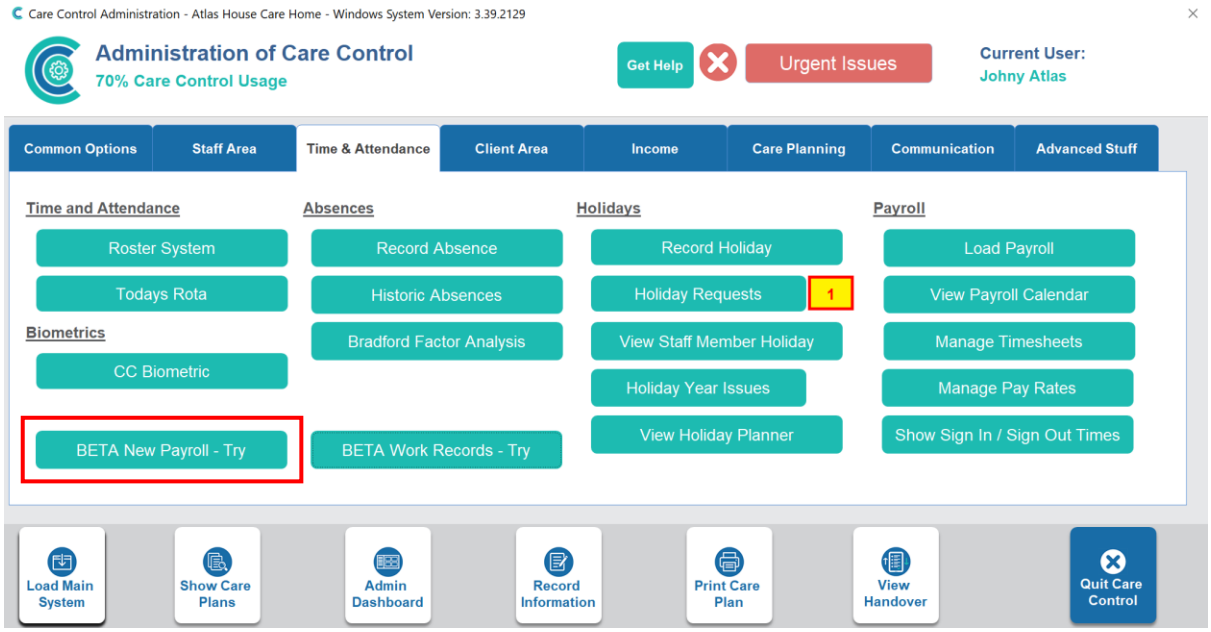



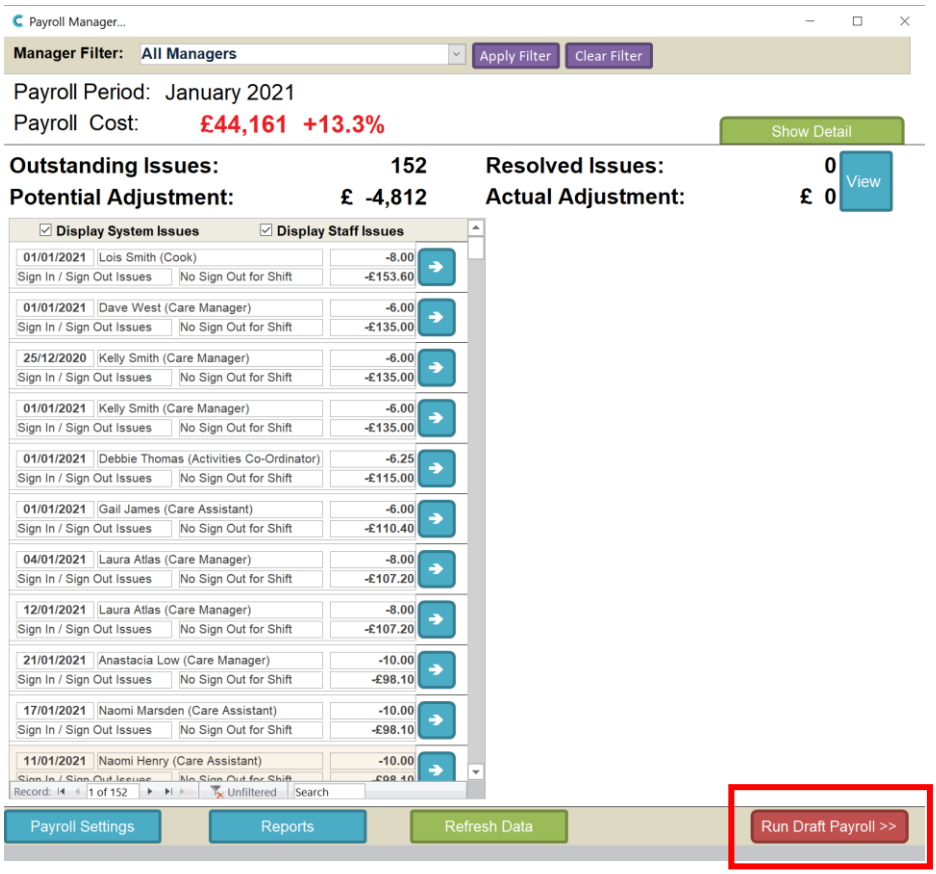

Business Status...
CURRENT OVERALL STATUS
Sign In Status
Shift Allocation
Service User Tasks
Other Tasks
Alerts
Sign In / Sign Out Analysis
Show All Records
Staff Working Today
Signed In?
Signed Out?
Status
Madyson Lee (Bank Care Assistant)
Madeline Wakefiled (Bank Care Assistant)
Dave West (Care Manager)
Jean Smith (Cook)
Debbie Thomas (Activities Co-Ordinator)
Joan James (Domestic)
Vanessa Thomas (Care Assistant)
Claire Thomas (Care Assistant)
Laura Atlas (Care Manager)
Johny Atlas (Managing Partner)


Care Plan Integrity Checks...
Filter Your Results Set
Select Service User:
(All Records)
Select CSG:
(All Records)
Care Plan Area:
(All Records)
What to Show?:
Warnings and Errors
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.
Record: 1 of 126
Unfiltered
Search
Get Help
Print Report

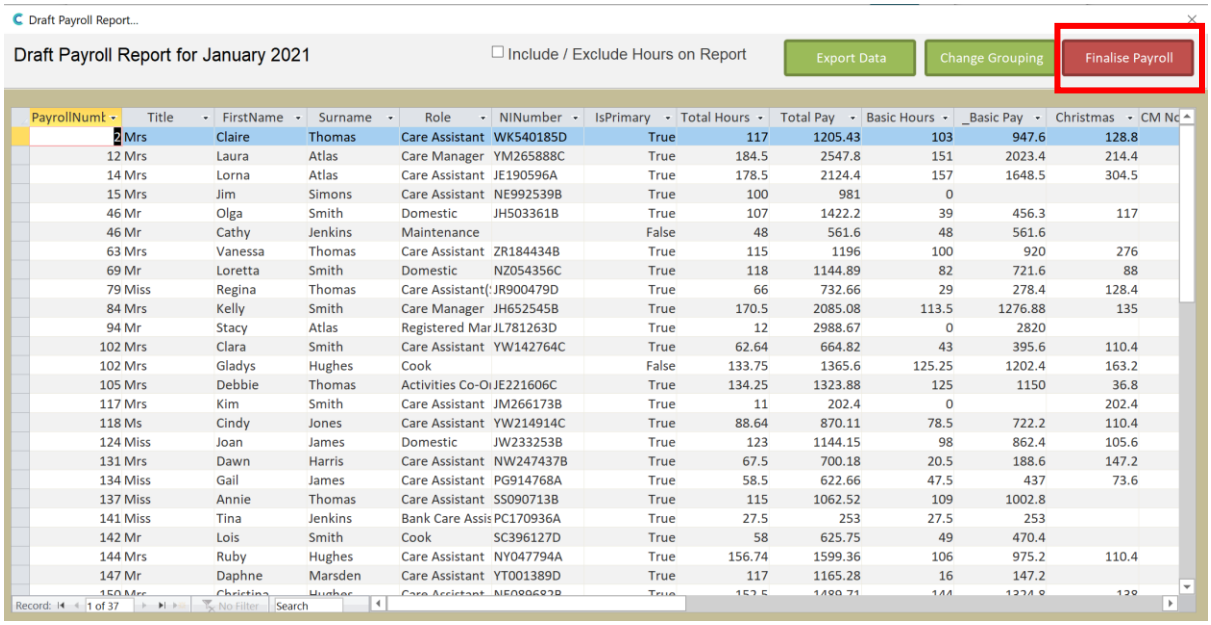
# Finalise Payroll Routine

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: -



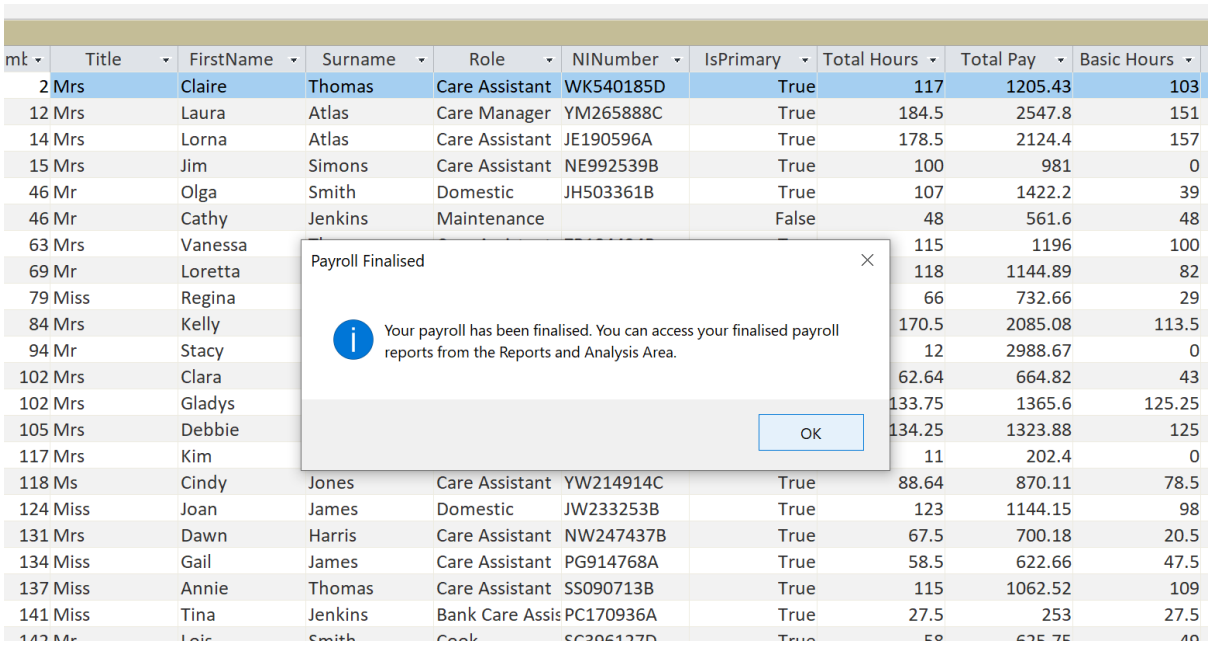



On the finalised report you can press the Finalise button: -




| PayrollNumb | 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-O | 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 | | |

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



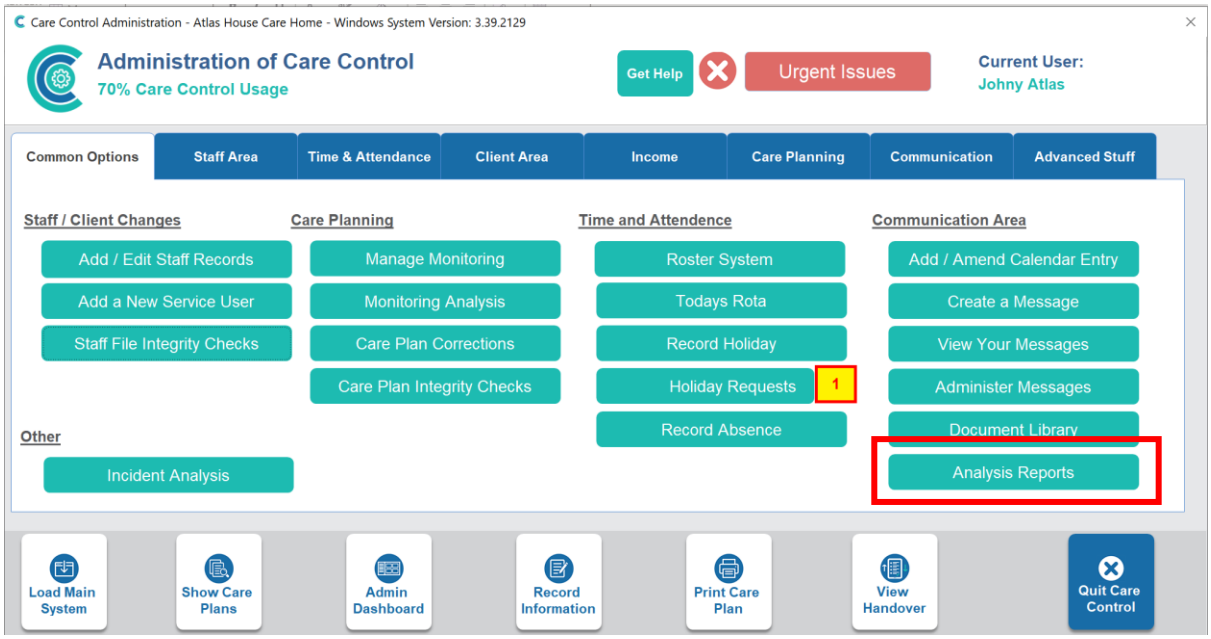

| mb | Title | FirstName | Surname | Role | NINumber | IsPrimary | Total Hours | Total Pay | Basic Hours |
|---|---|---|---|---|---|---|---|---|---|
| 2 | Mrs | Claire | Thomas | Care Assistant | WK540185D | True | 117 | 1205.43 | 103 |
| 12 | Mrs | Laura | Atlas | Care Manager | YM265888C | True | 184.5 | 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 | | | | | 115 | 1196 | 100 |
| 69 | Mr | Loretta | | | | | 118 | 1144.89 | 82 |
| 79 | Miss | Regina | | | | | 66 | 732.66 | 29 |
| 84 | Mrs | Kelly | | | | | 170.5 | 2085.08 | 113.5 |
| 94 | Mr | Stacy | | | | | 12 | 2988.67 | 0 |
| 102 | Mrs | Clara | | | | | 62.64 | 664.82 | 43 |
| 102 | Mrs | Gladys | | | | | 133.75 | 1365.6 | 125.25 |
| 105 | Mrs | Debbie | | | | | 134.25 | 1323.88 | 125 |
| 117 | Mrs | Kim | | | | | 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 |

## Finalisation Process

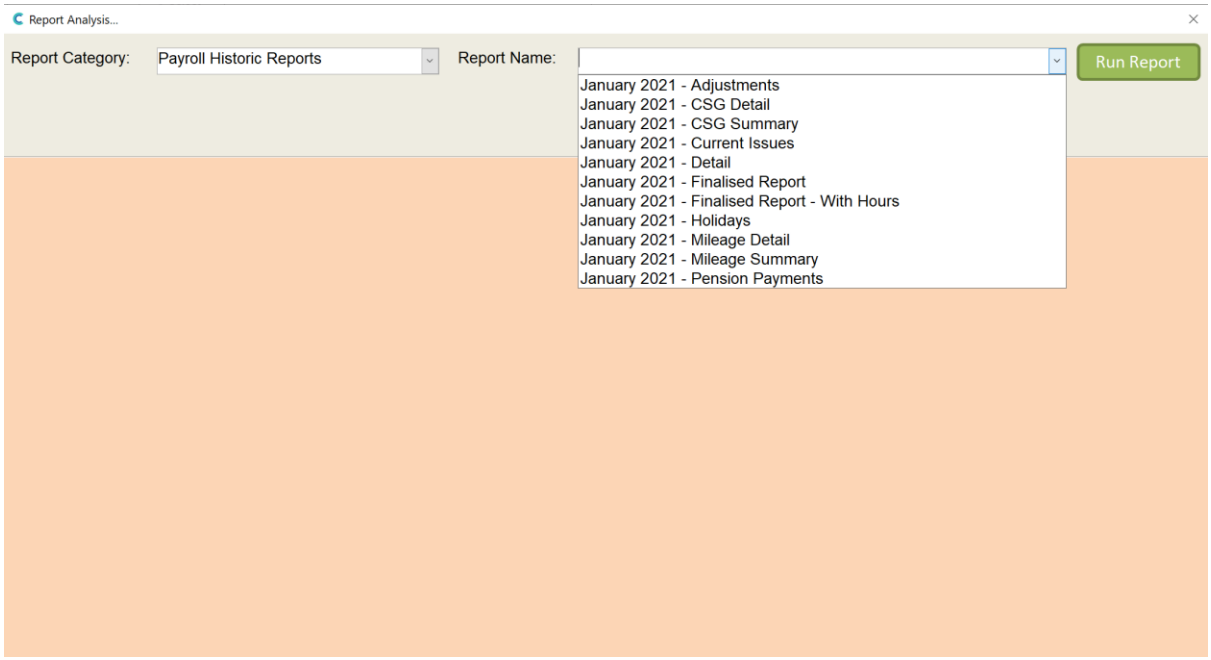
The finalisation process completes the following steps: -

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: -



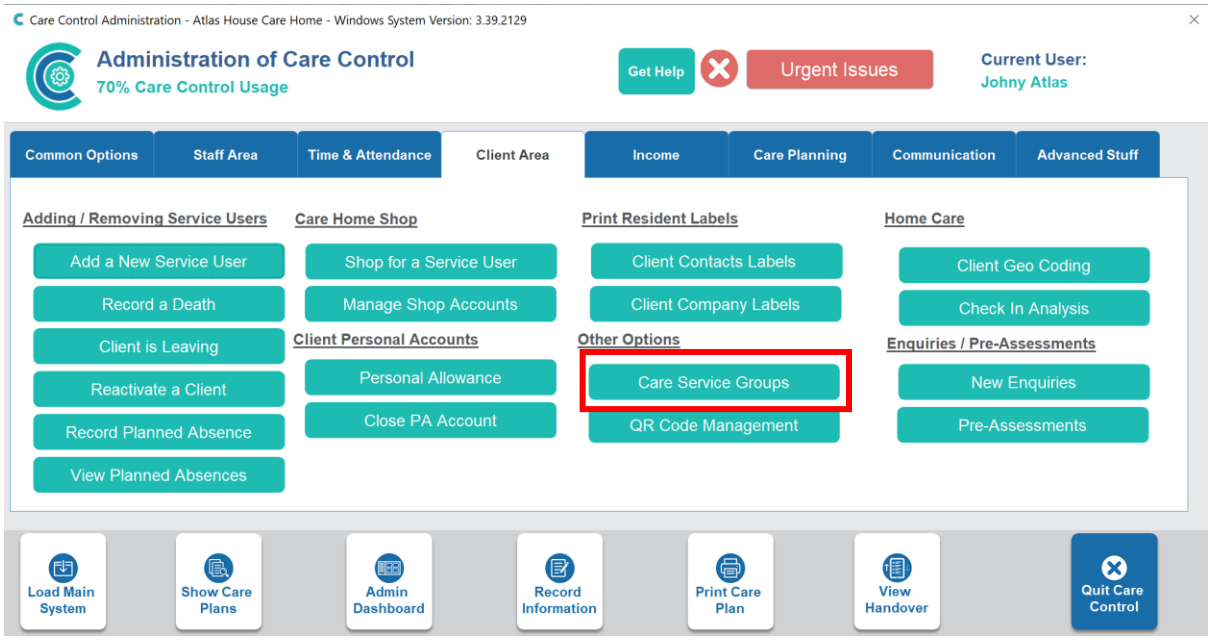
All historical payroll reports are under the report category of “Payroll Historical Reports”: -



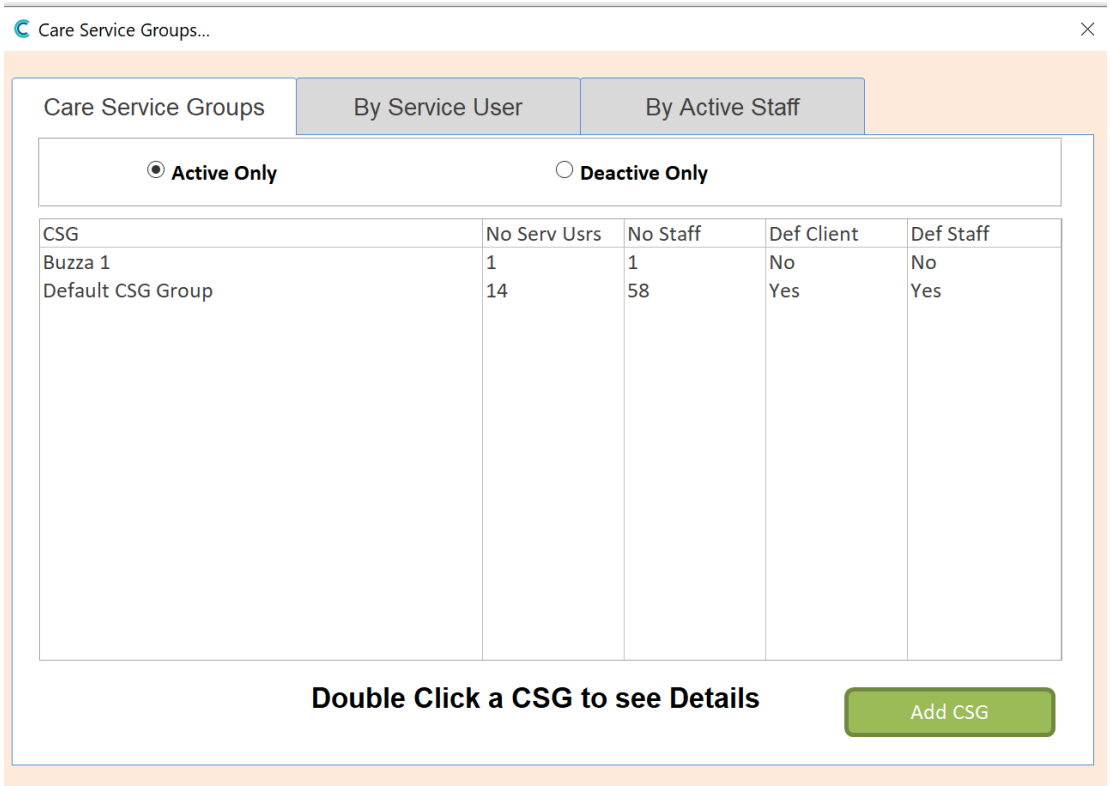

You will see them listed in Period order.

# CSG Screen Update

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

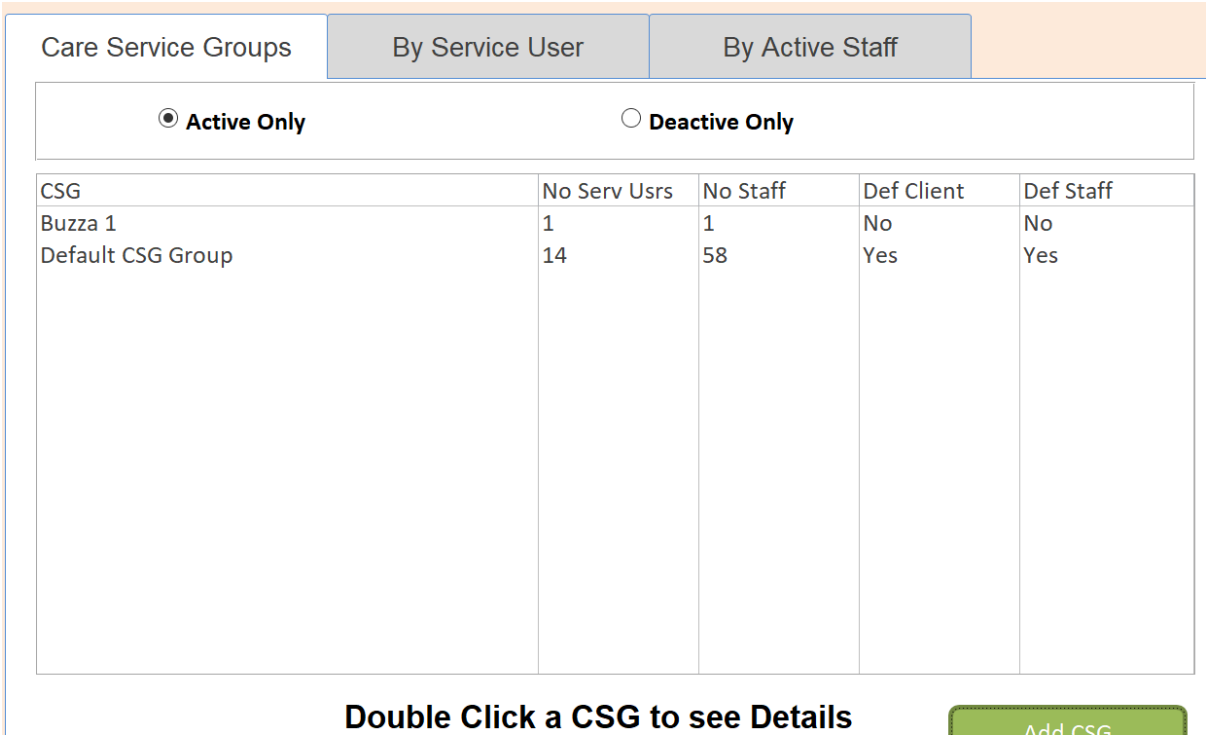


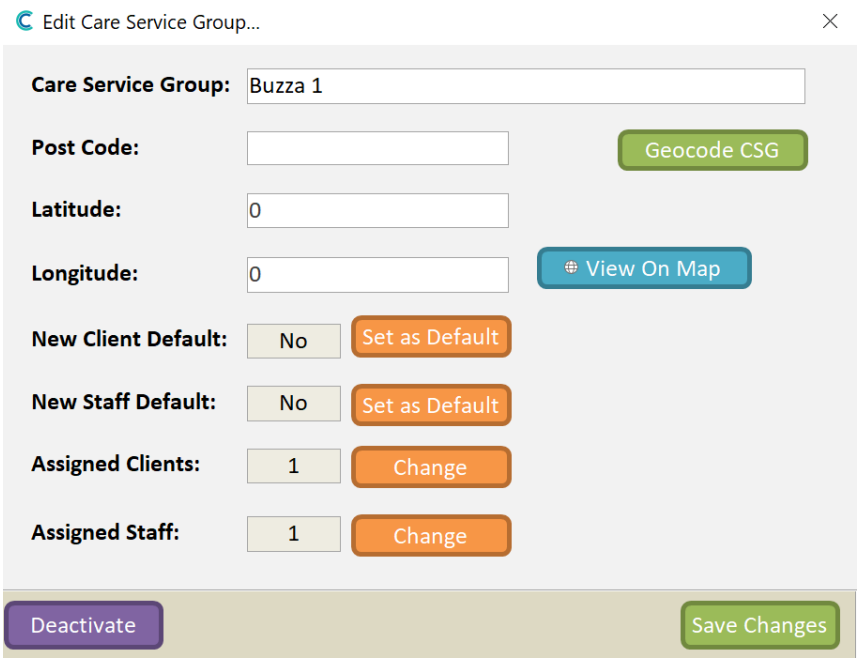

You will notice three tabs: -



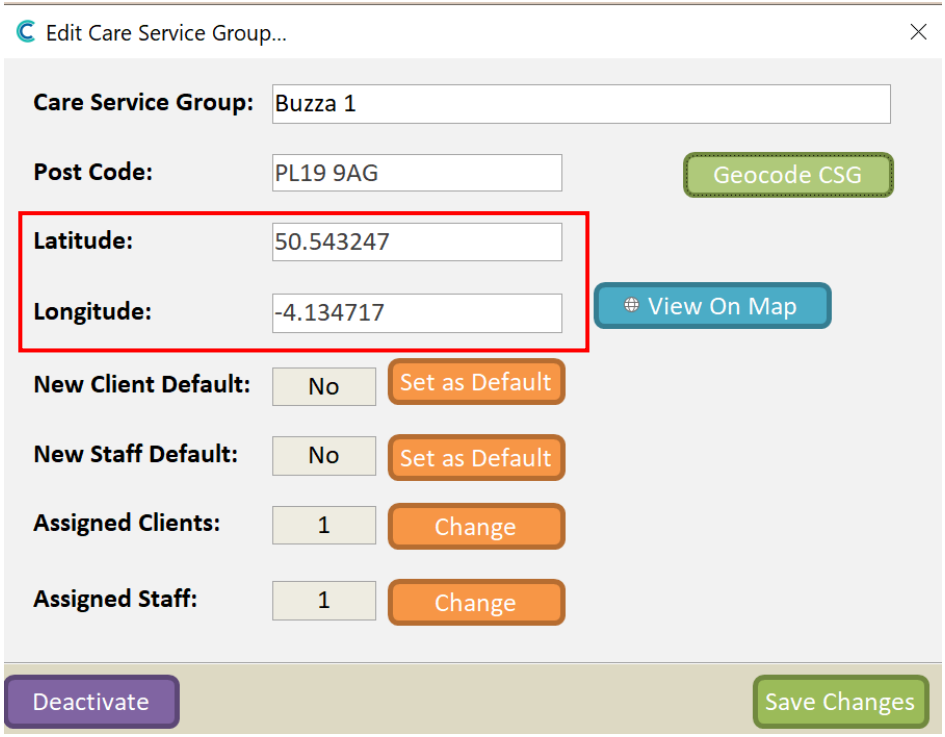
## Edit CSG Screen

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



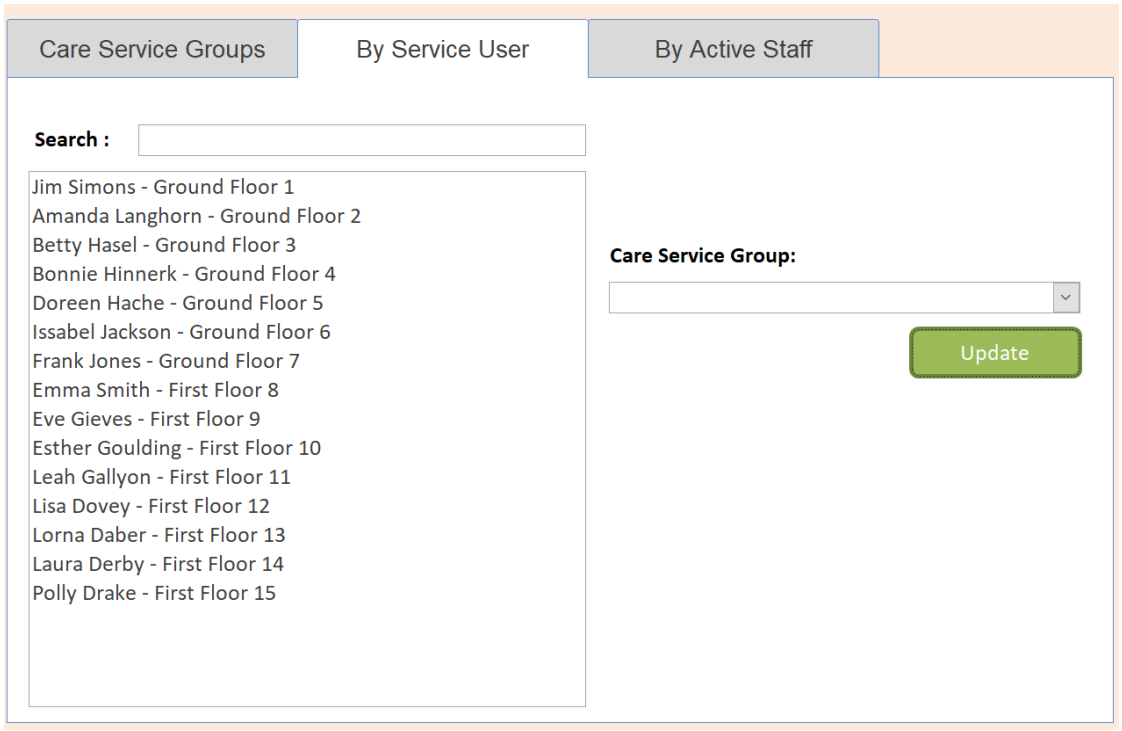




We have added Geocode Support for CSG’s.  You can Geocode an entry by entering a Post Code and select Geocode CSG.

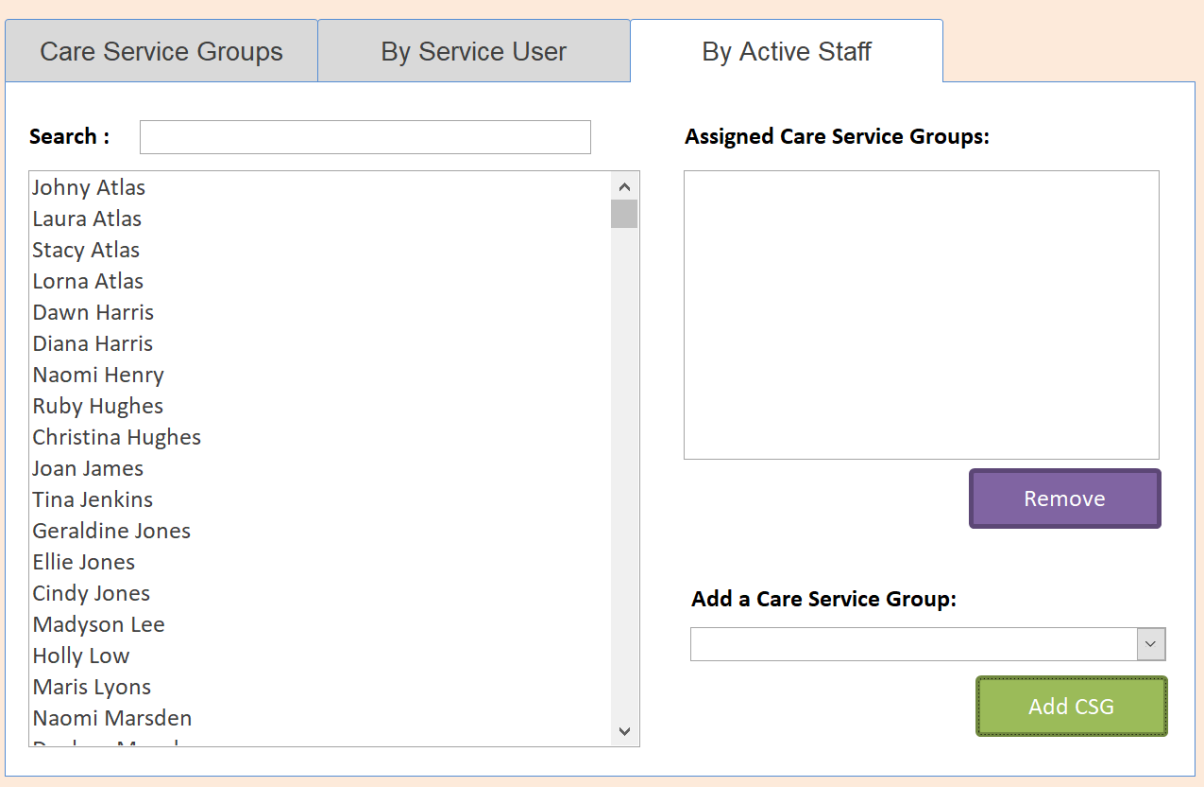



This information can be used when we compare Check In / Check Out against a CSG Allocation.

## Service User Screen



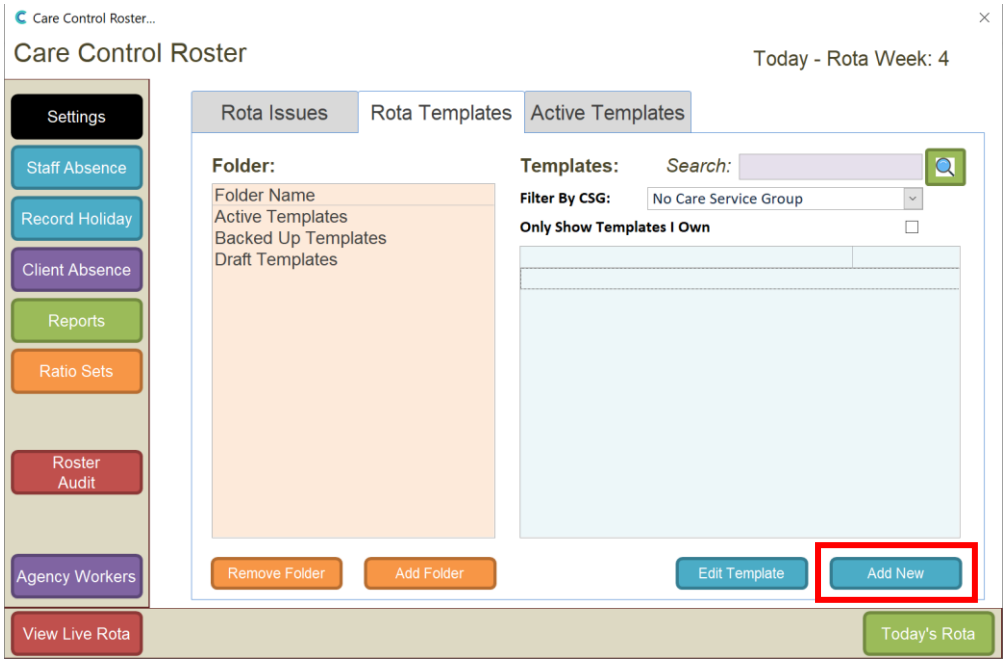

On the service user screen you can check and update the CSG for a given Service User. You can search for a Service User using the Search Field.



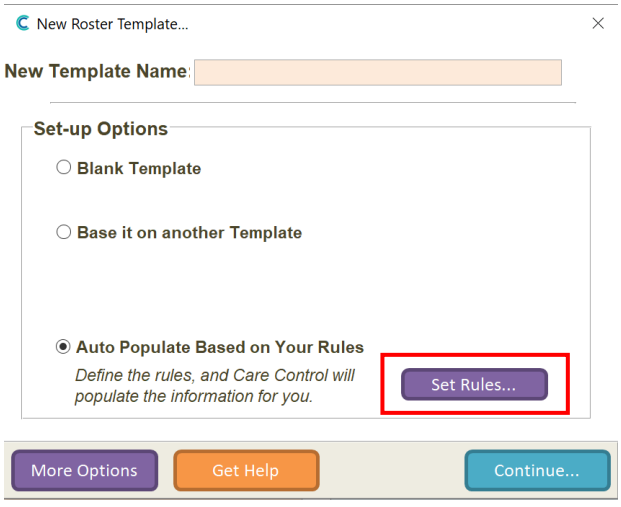

Similarly, on the By Active Staff screen you can view which CSG's a staff member is assigned.  You can remote and add a CSG on this screen also.

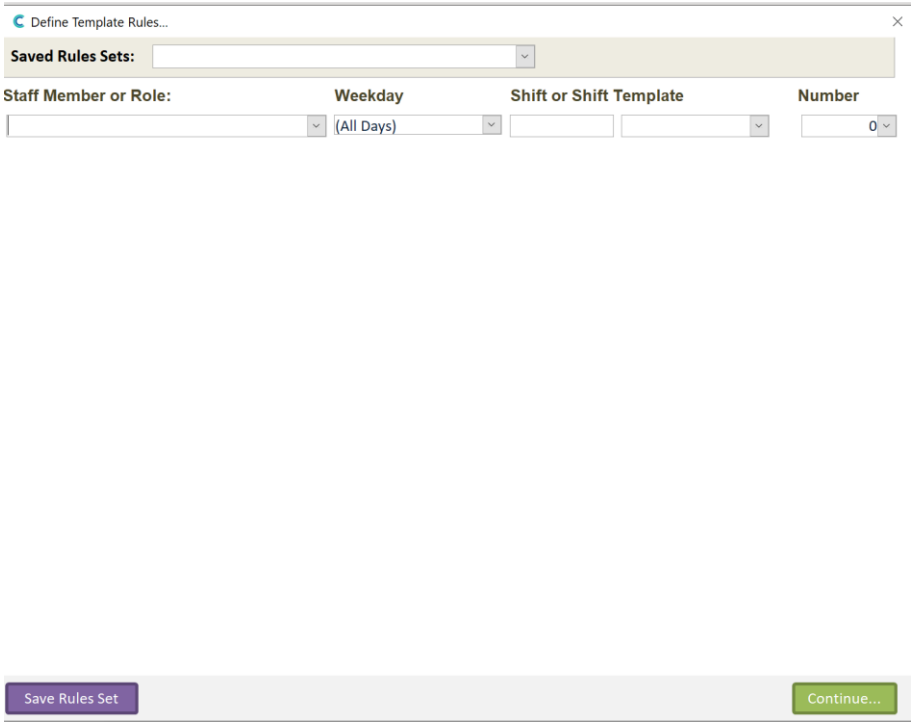
# Enhanced Template Rules Sets

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: -

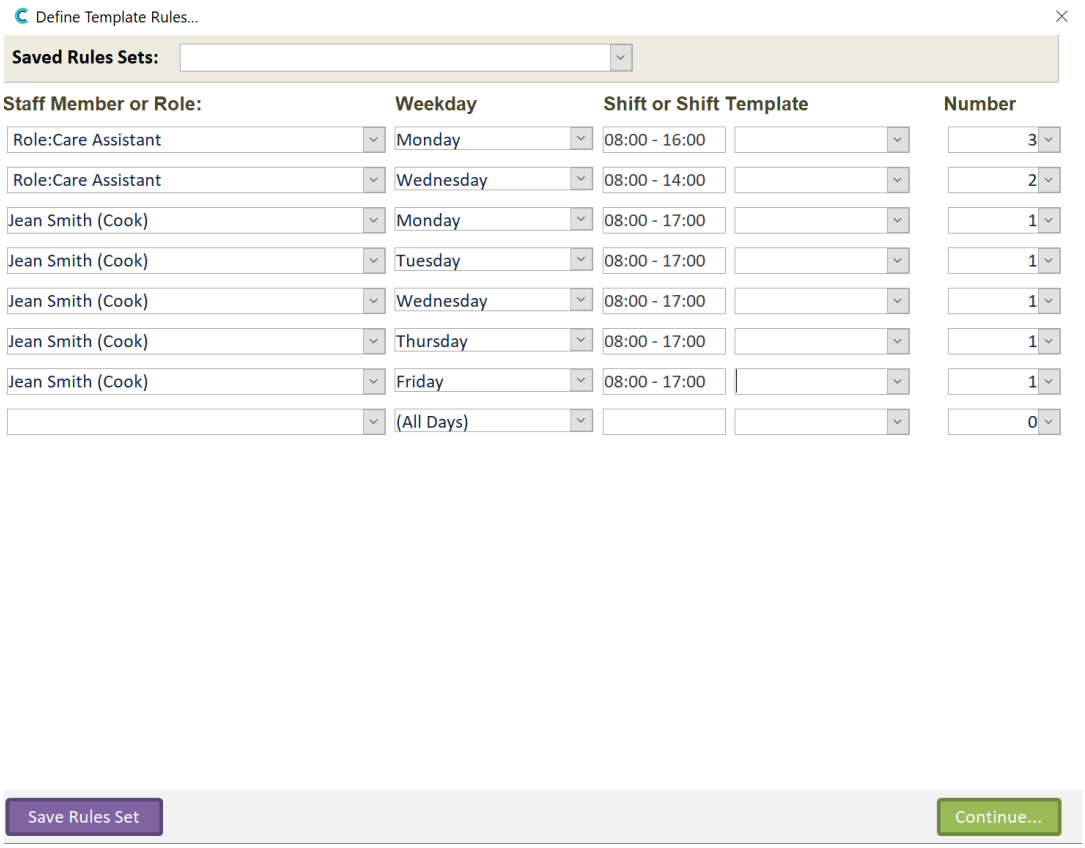



When you Add a New Template, you have the following options: -

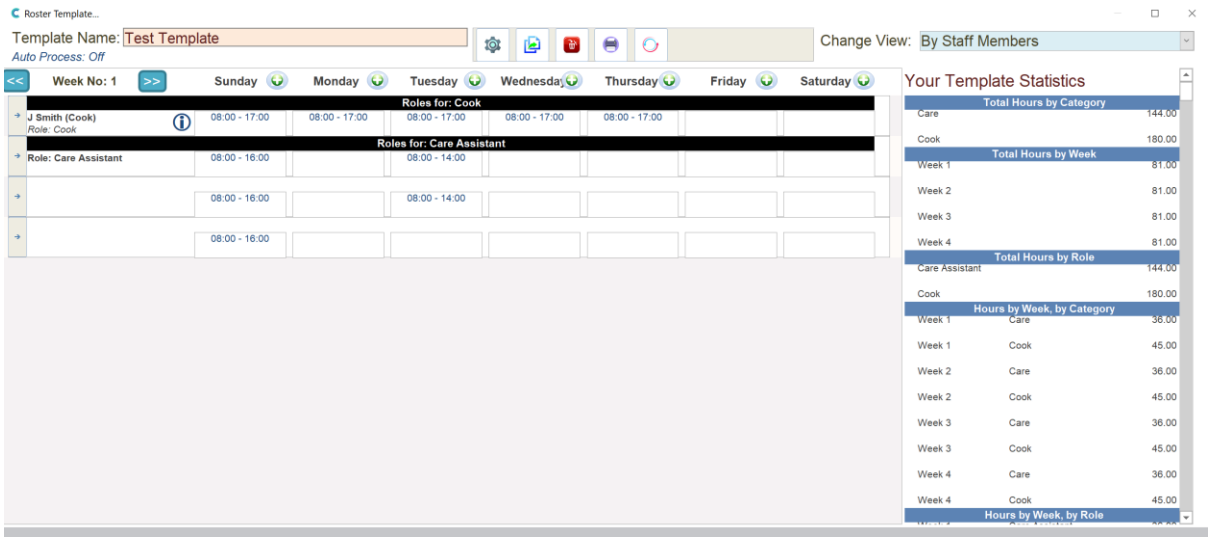





You will see you can now add a Role or a Staff Member and now enter a Shift or select a Shift Template: -

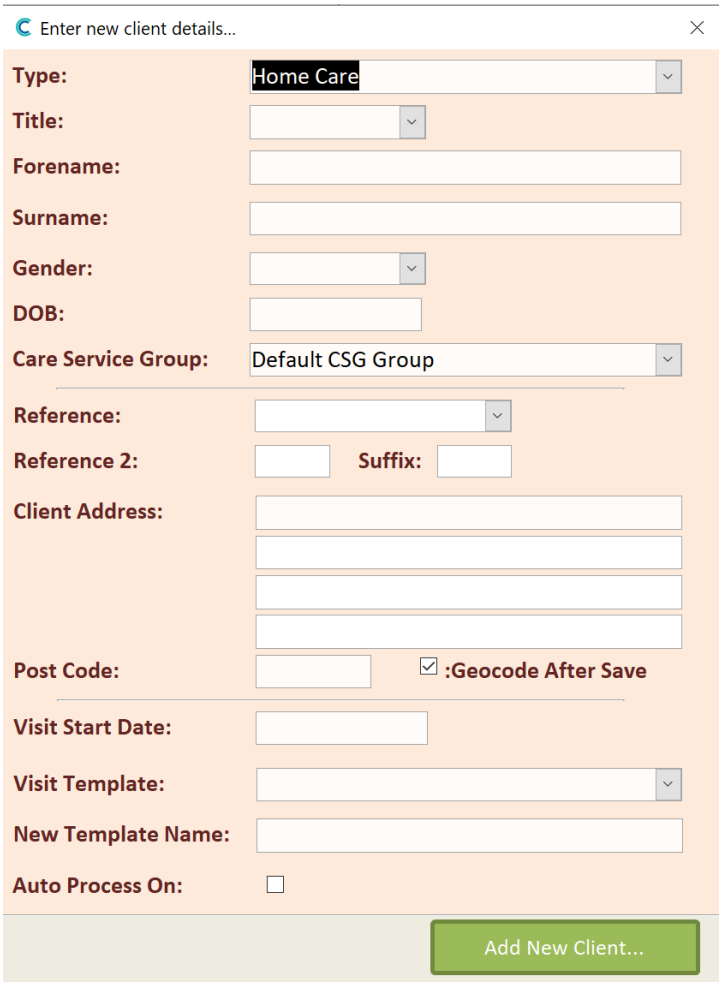



In the above example we will create a rota template with a mixture of shifts assigned to roles and individual staff members.  Note, you can also Save this Rule Set to access again.


Roster Template...
Template Name: Test Template
Auto Process: Off
Change View: By Staff Members
Week No: 1
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Roles for: Cook
J Smith (Cook)
Role: Cook
08:00 - 17:00
Roles for: Care Assistant
Role: Care Assistant
08:00 - 16:00
08:00 - 14:00
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
Hours by Week, by Role

## Enhanced New Service User for Dom Care

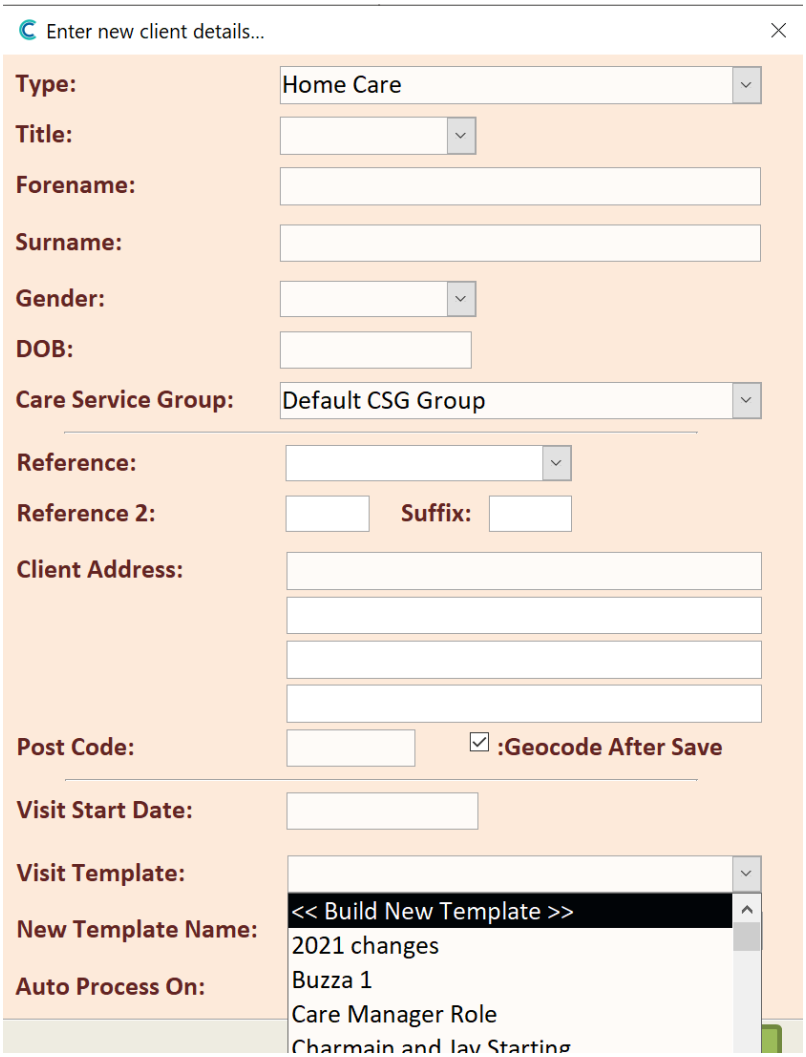
We have enhanced the Home Care New Service User Screen.  This screen is only showed if you are adding a service user of Type Home Care: -




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: -



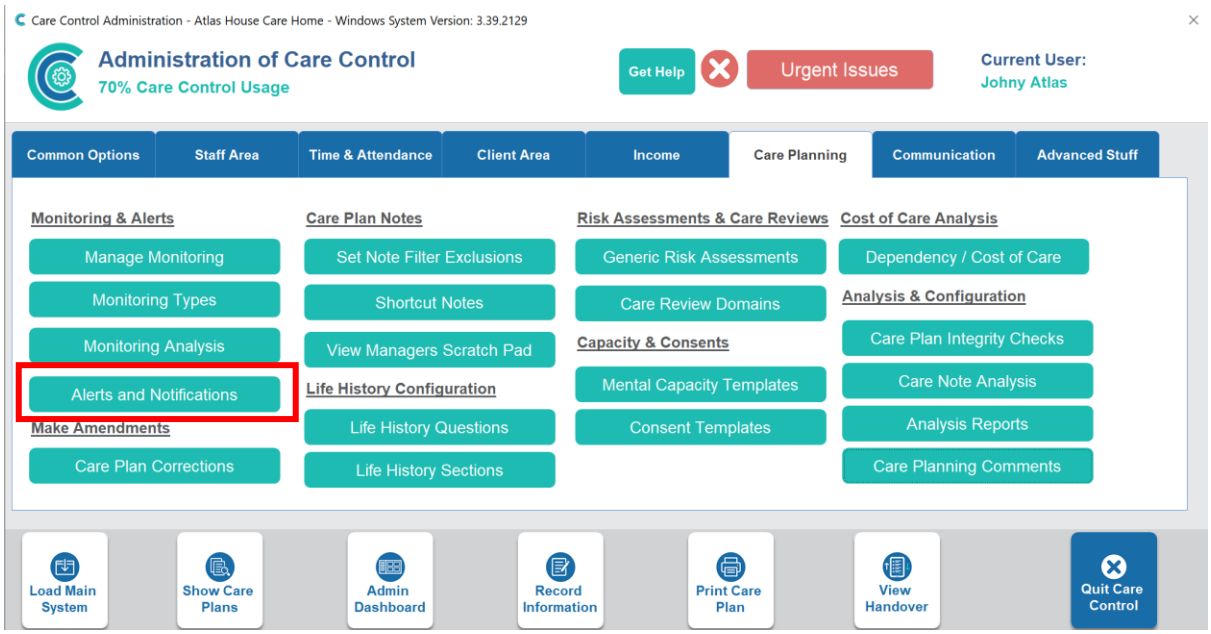

This allows you to create a template at the time that a client is added to your organisation.

# Check In Alerts

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

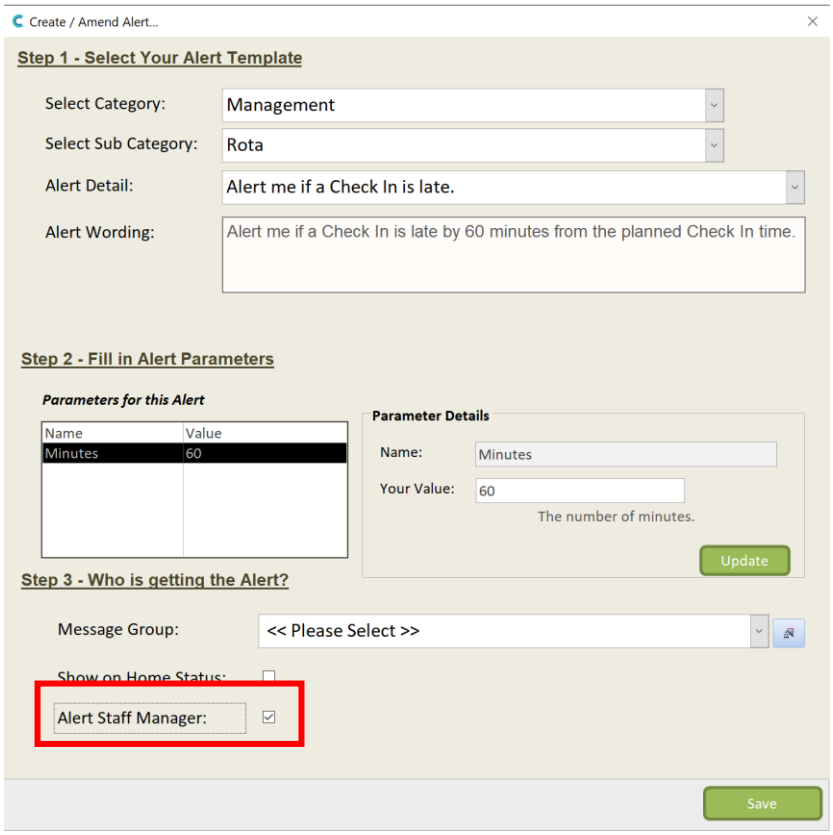
| Alert | Description |
|---|---|
| Alert me if a Check In is late. | Alert me if a Check In is late by %minutes% minutes from the planned Check In time. |
| Alert me if a Check Out is late. | Alert me if a Check Out is late by %minutes% minutes from the planned Check Out time. |
| Alert me if a Check 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: -



## Added Alert Support for Managers

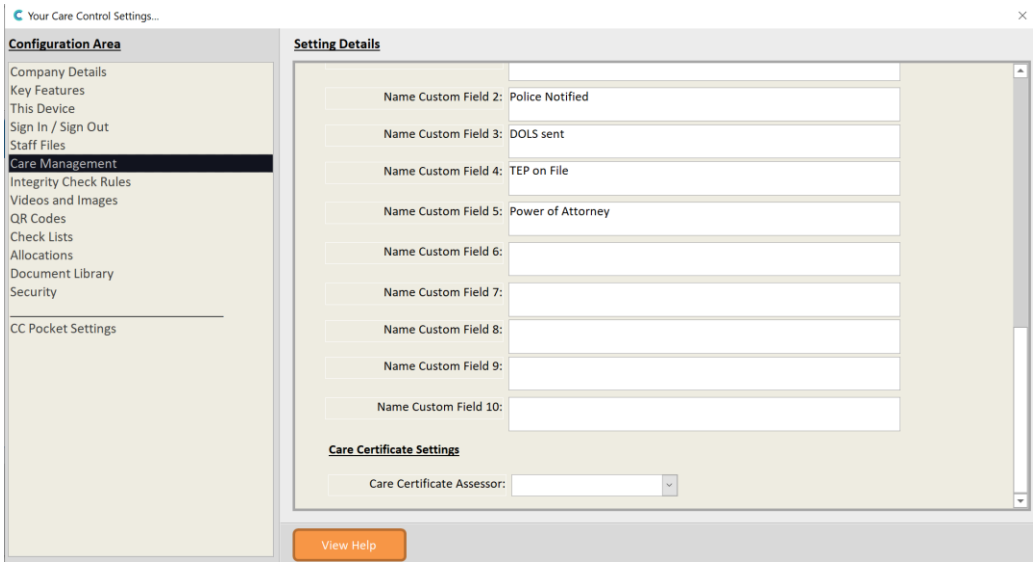
Some of the Alerts have a new field that you can tick, so that if the Alert fires, the staff member's manager is notified: -




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

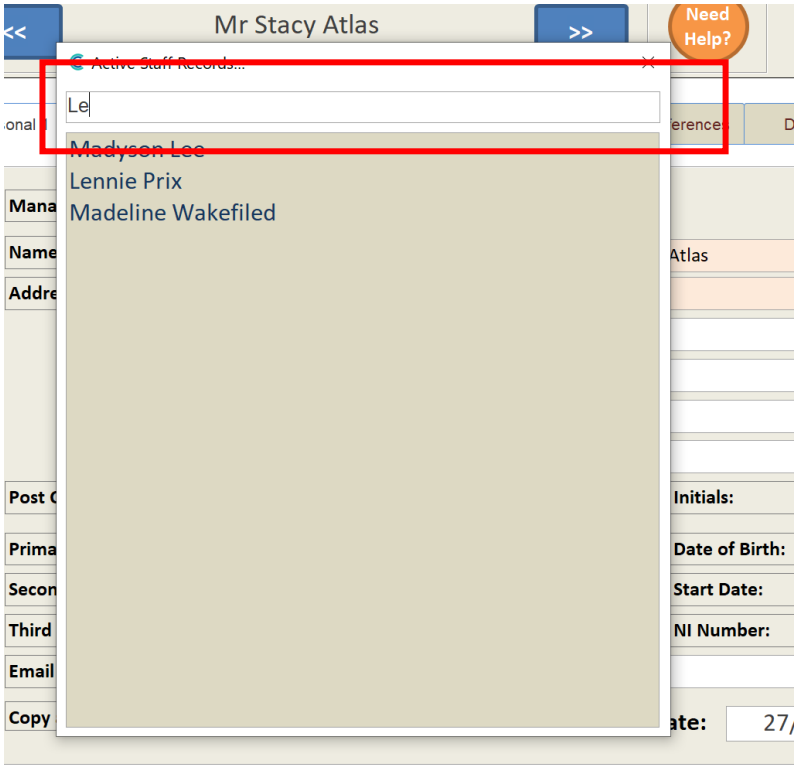
We have added further enhancements to the Check In / Check Out feature on Pocket which makes the version in Pocket 2.17 more robust for devices where location services may be switched off.

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

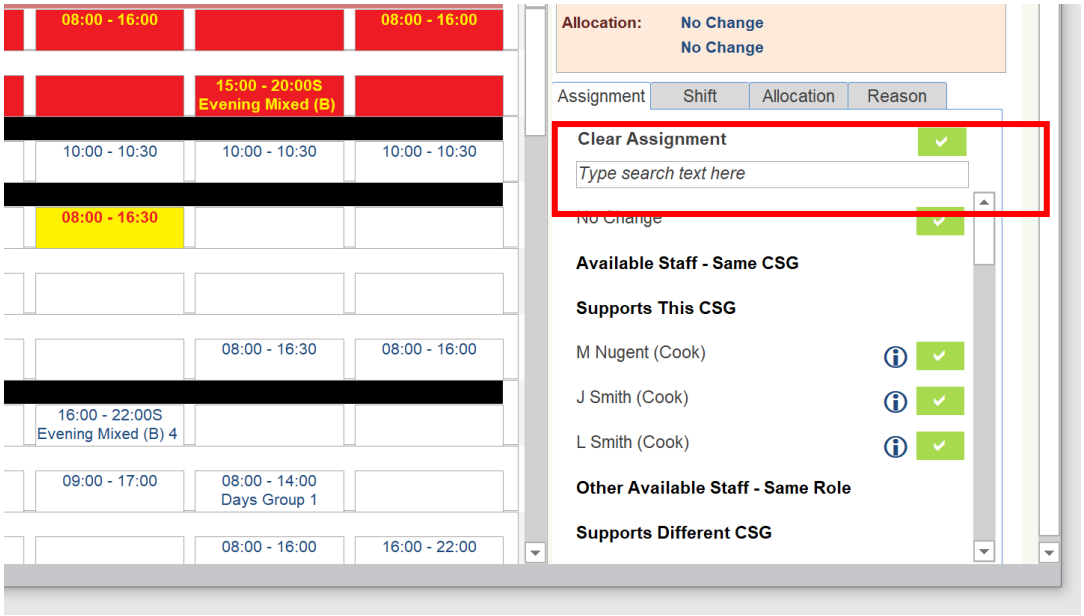
We ask that if you are using this feature that you move all your staff to Pocket 2.17.

## Added Search and Filters on Key Screens

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



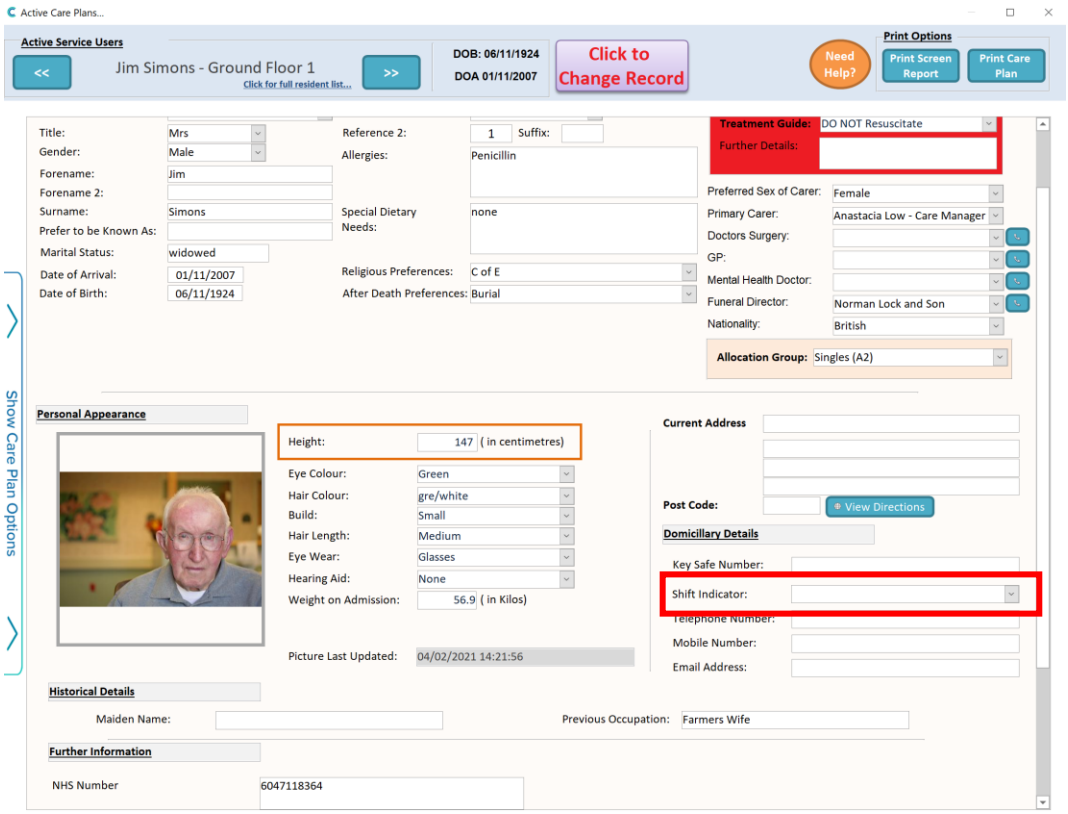

Staff selection screen.




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: -

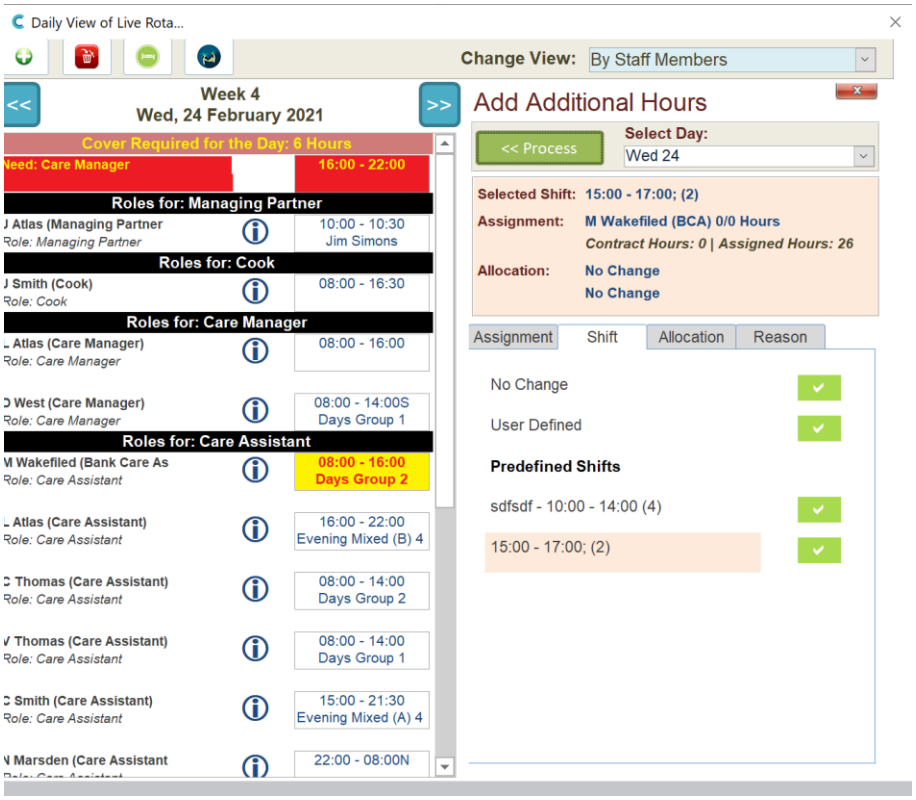



If you set this field to a value, any shifts added to your rota that are allocated to this service user will be appended with this Shift Indicator as long as the shift being added does not already have a Shift Indicator.

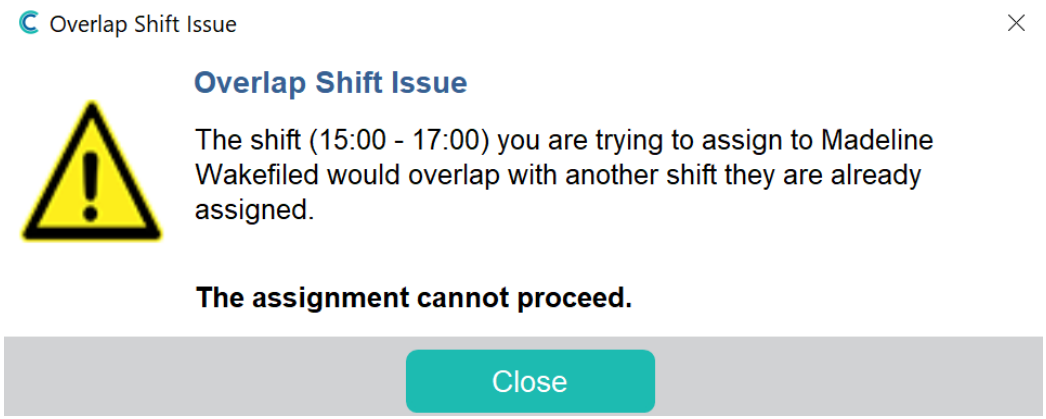
Use this feature to help ensure that the correct payroll treatment is applied for any staff who look after specific clients.

## 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: -

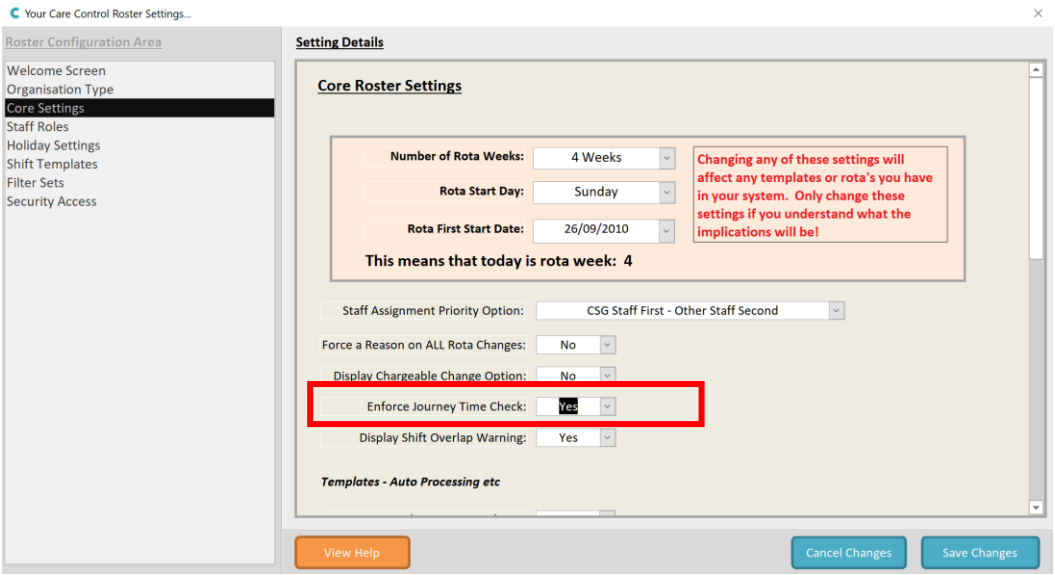



In this example we are trying to add a shift to our live rota (15:00 – 17:00) which overlaps an existing shift (08:00 – 16:00). When we press Process we get the following warning: -



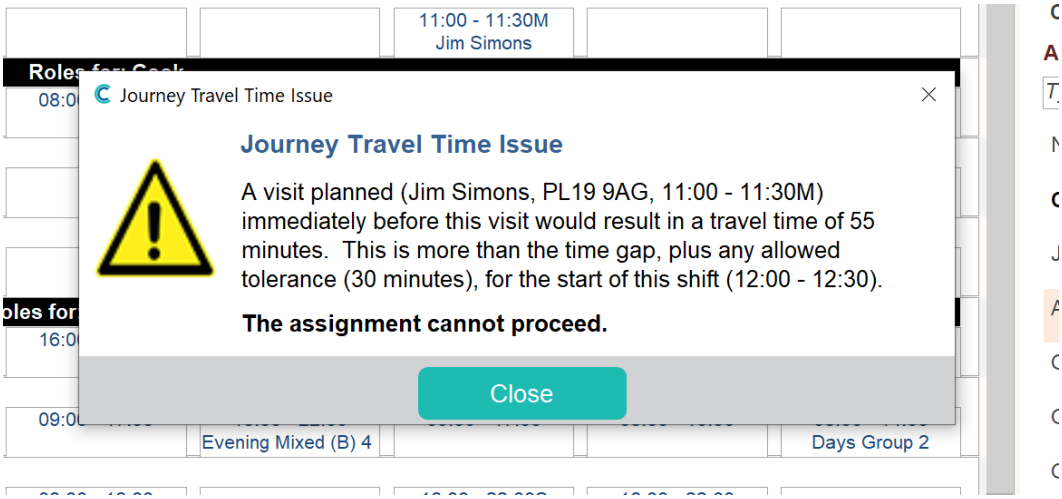
# Journey Time Warning

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




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.

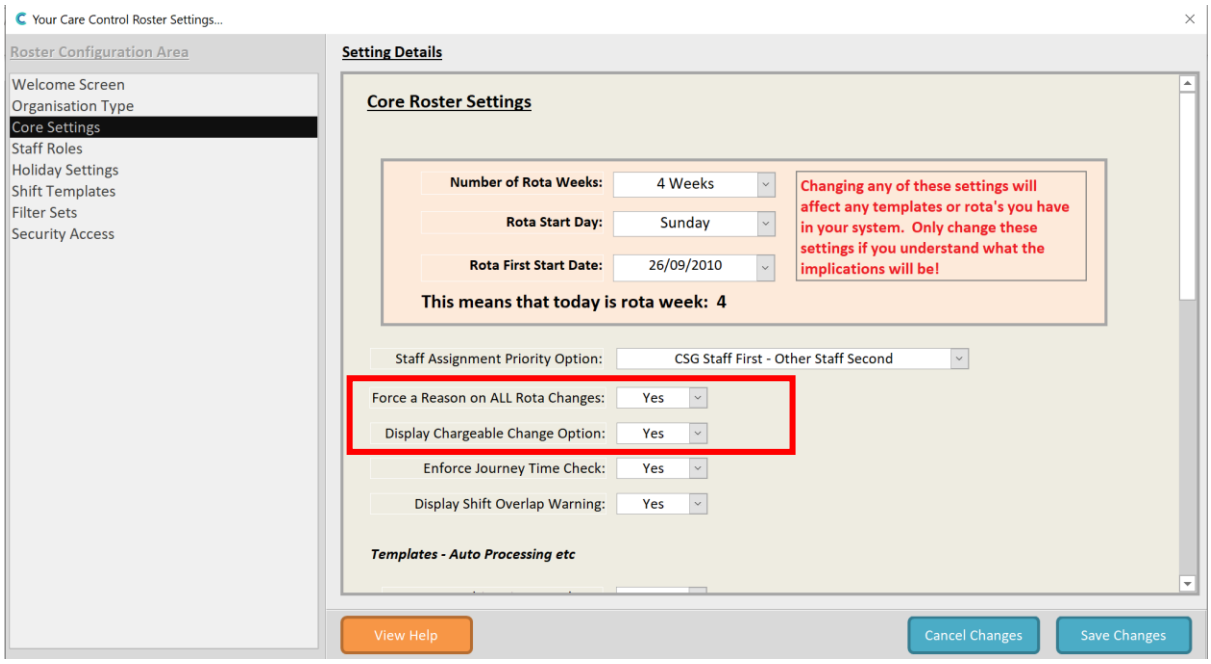
In this example a staff member (J Atlas) has a visit to a client (J Simmons) at 11.00am which is planned to last until 11.30am. We are then trying to add another visit to (A Langhorn) at 12:00pm. As the distance between J Simmons and A Langhorn has a travel time of 55 minutes, but the time gap between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



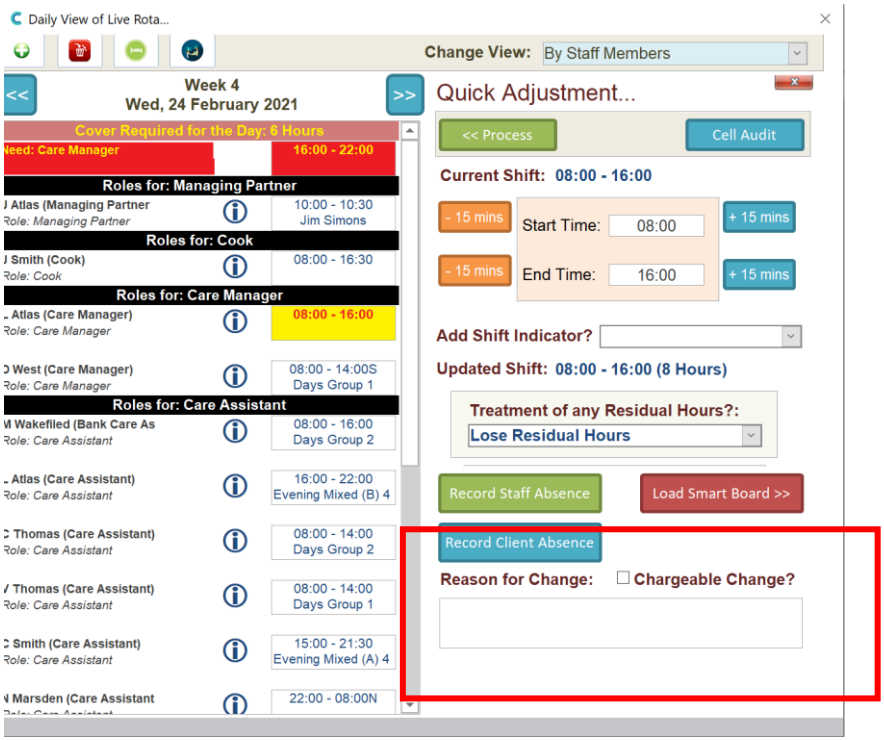

The system will not allow you to enter this visit.

# Add reason for change on rota changes

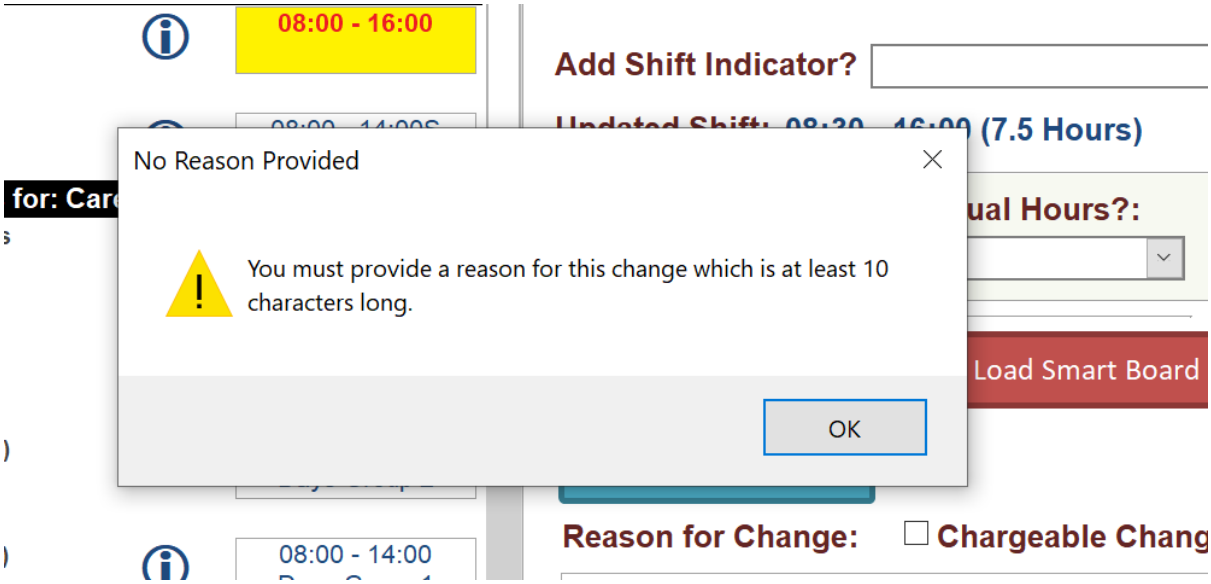
There are two further settings added to the Roster System: -



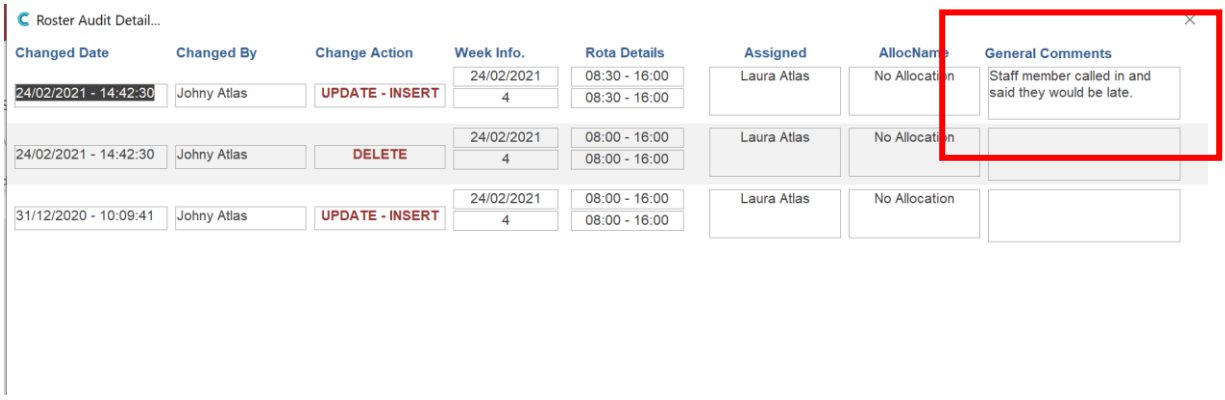

The first is a setting which will force any changes to the Live Rota, that the user must enter a Reason for that change: -



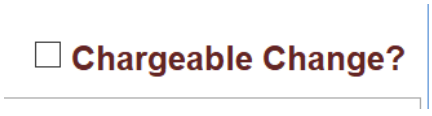

If you try and make a change you will be prompted to enter a reason: -




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




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: -




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.