

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 X 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

Other

- Incident Analysis

Care Planning

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

Time and Attendance

- Roster System
- Todays 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

Load Main System

Show Care Plans

Admin Dashboard


Record Information

Print Care Plan

View Handover

Quit Care Control

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 X ▲

Adding Staff or Service User
Load Full Admin
Show Care Plans
Add a Care Note
Record Information
Print Care Plan
View Handover
Quit Care Control

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
- Todays 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

X
Sign In Status

X
Allocation Status

X
Service User Tasks

X
Other Tasks

X
Alerts Status

Hours to Cover - Next 21 Days View Todays 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> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Roster System</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Todays Rota</p> <p><u>Biometrics</u></p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">CC Biometric</p> <div style="border: 2px solid red; padding: 5px; text-align: center; background-color: #27ae60; color: white; margin-top: 10px;">BETA New Payroll - Try</div> | <p><u>Absences</u></p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Record Absence</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Historic Absences</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Bradford Factor Analysis</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-top: 10px;">BETA Work Records - Try</p> | <p><u>Holidays</u></p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Record Holiday</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Holiday Requests 1</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">View Staff Member Holiday</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Holiday Year Issues</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-top: 10px;">View Holiday Planner</p> | <p><u>Payroll</u></p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Load Payroll</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">View Payroll Calendar</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Manage Timesheets</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-bottom: 5px;">Manage Pay Rates</p> <p style="text-align: center; background-color: #27ae60; color: white; padding: 5px; margin-top: 10px;">Show Sign In / Sign Out Times</p> |
|---|--|---|---|

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 | View |
| 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 Nd |
|------------|-------|-----------|---------|-------------------|-----------|-----------|-------------|-----------|-------------|-----------|-----------|-------|
| 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 | Mrs | 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 | ME090623B | True | 152.5 | 1489.71 | 144 | 1224.8 | 128 | |

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

| mt | 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

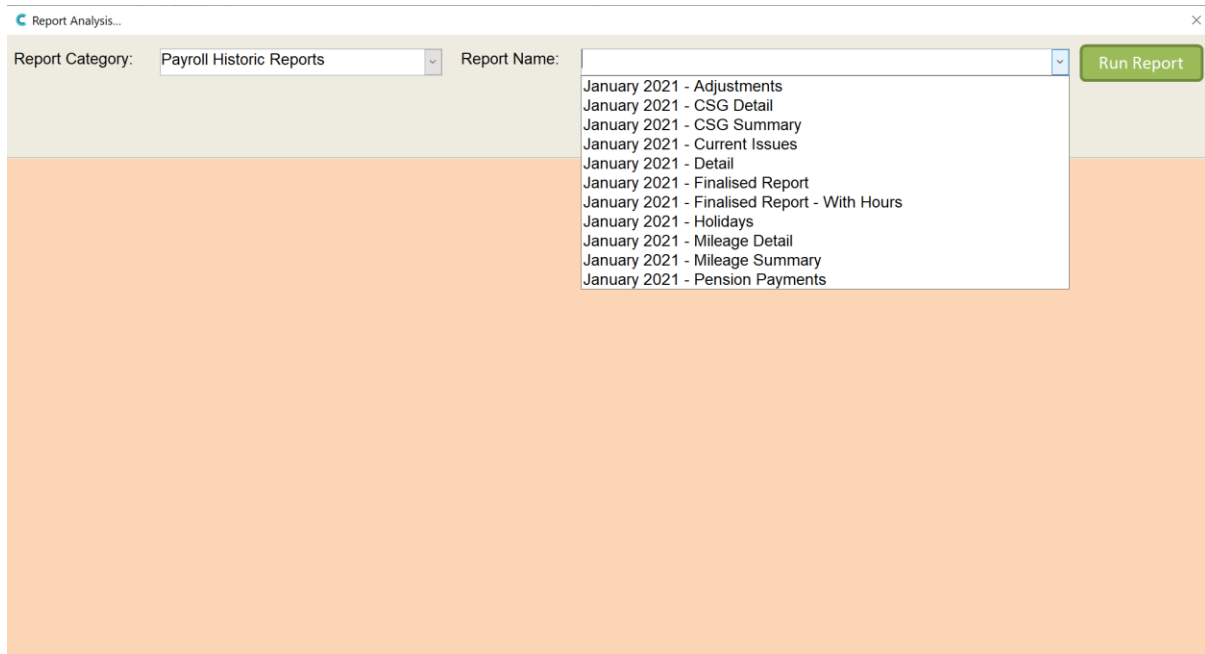
The finalisation process completes the following steps: -

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 logo, 'Administration of Care Control 70% Care Control Usage', a 'Get Help' button, an 'Urgent Issues' button, and the 'Current User: Johnny Atlas'. Below the header is a navigation bar with tabs for 'Common Options', 'Staff Area', 'Time & Attendance', 'Client Area', 'Income', 'Care Planning', 'Communication', and 'Advanced Staff'. The main content area is divided into four columns: 'Staff / Client Changes', 'Care Planning', 'Time and Attendance', and 'Communication Area'. The 'Communication Area' column contains buttons for 'Add / Amend Calendar Entry', 'Create a Message', 'View Your Messages', 'Administer Messages', 'Document Library', and 'Analysis Reports'. The 'Analysis Reports' button is highlighted with a red rectangular border. A yellow box with the number '1' is positioned over the 'Holiday Requests' button in the 'Time and Attendance' column. At the bottom of the interface is a footer bar with buttons 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: 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

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

Service User Screen

Care Service Groups By Service User By Active Staff

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: Update

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

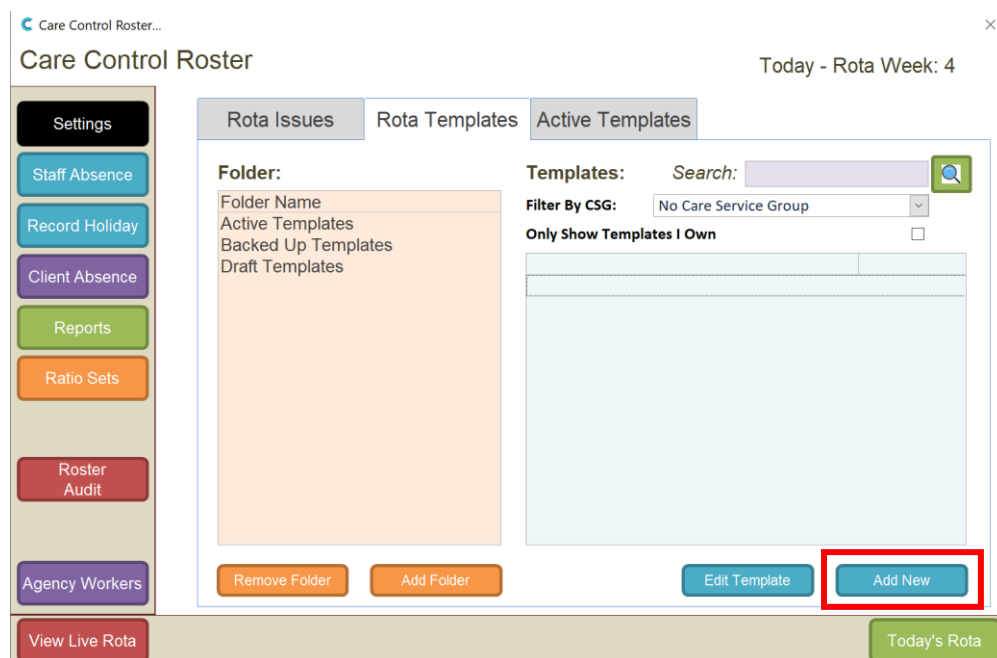
Assigned Care Service Groups:

Add a Care Service Group:

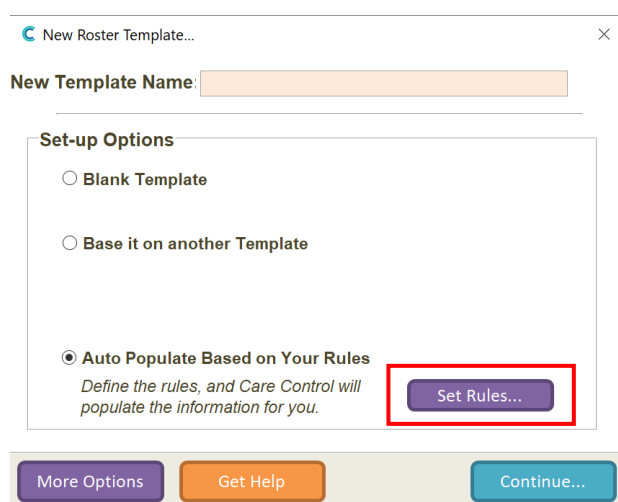
Similarly, on the By Active Staff screen you can view which CSG's a staff member is assigned. You can remove and add a CSG on this screen also.

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:

Title:

Forename:

Surname:

Gender:

DOB:

Care Service 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.

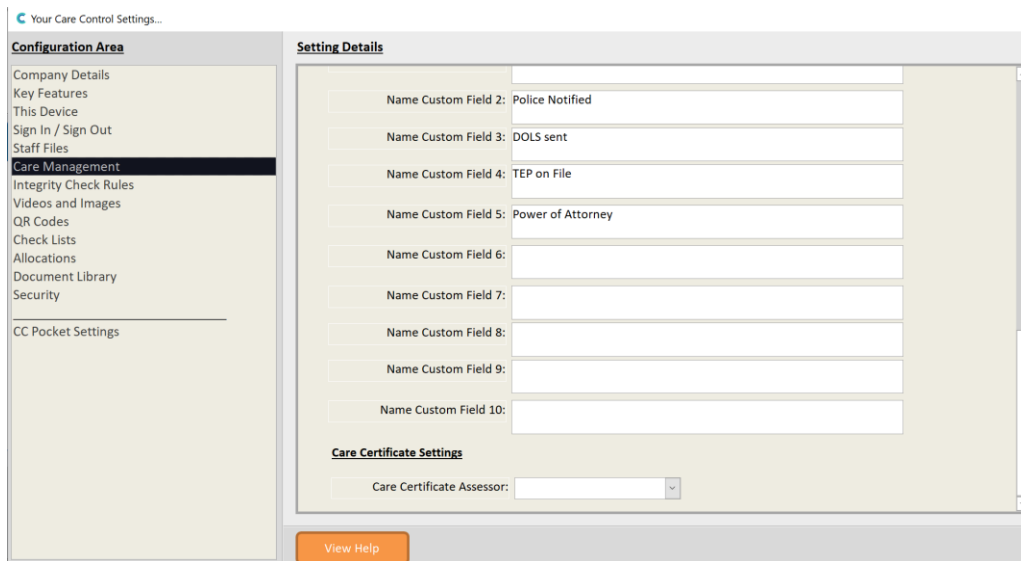
| Name | Value |
|---------|-------|
| Minutes | 60 |

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 red-bordered checkbox labeled "Alert Staff Manager:" which is 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

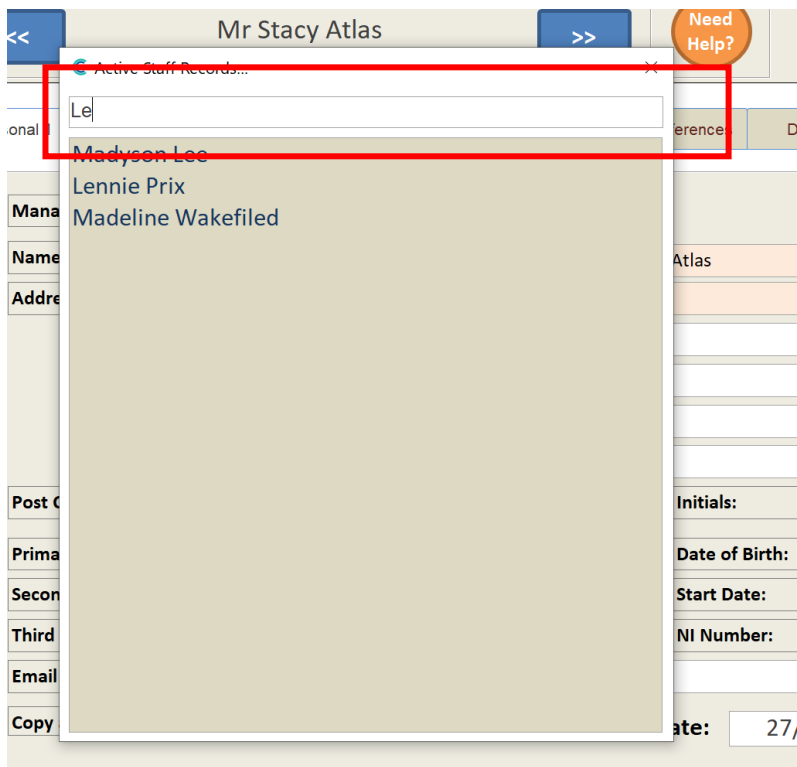
We have added further enhancements to the Check In / Check Out feature on Pocket which makes the version in Pocket 2.17 more robust for devices where location services may be switched off.

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

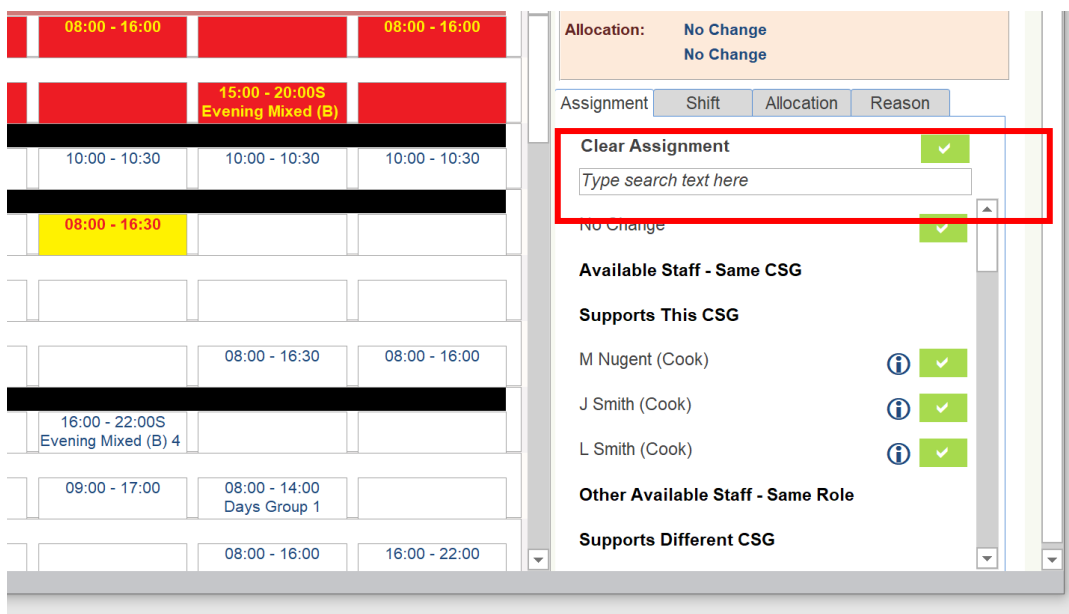
We ask that if you are using this feature that you move all your staff to Pocket 2.17.

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 'Personal Details' section includes fields for Title, Gender, Forename, Surname, Date of Birth, Date of Arrival, Reference 2, Suffix, Allergies (Penicillin), Special Dietary Needs (none), Religious Preferences (C of E), After Death Preferences (Burial), Treatment Guide (DO NOT Resuscitate), Preferred Sex of Carer (Female), Primary Carer (Anastacia Low - Care Manager), Doctors Surgery, GP, Mental Health Doctor, Funeral Director (Norman Lock and Son), Nationality (British), Allocation Group (Singles (A2)), Current Address, Post Code, Domiciliary Details (Key Safe Number, Shift Indicator, Telephone Number, Mobile Number, Email Address). The 'Shift Indicator' field is highlighted with a red box.

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 staff members and their assigned shifts is shown, categorized by role: Managing Partner, Cook, Care Manager, and Care Assistant. On the right, the 'Add Additional Hours' dialog is open, showing a selected shift of 15:00 - 17:00 (2) for Madeline Wakefiled (BCA). The dialog also displays the current assignment (M Wakefiled (BCA) 0/0 Hours) and allocation (No Change). Below this, a table lists the reasons for the warning:

| 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).

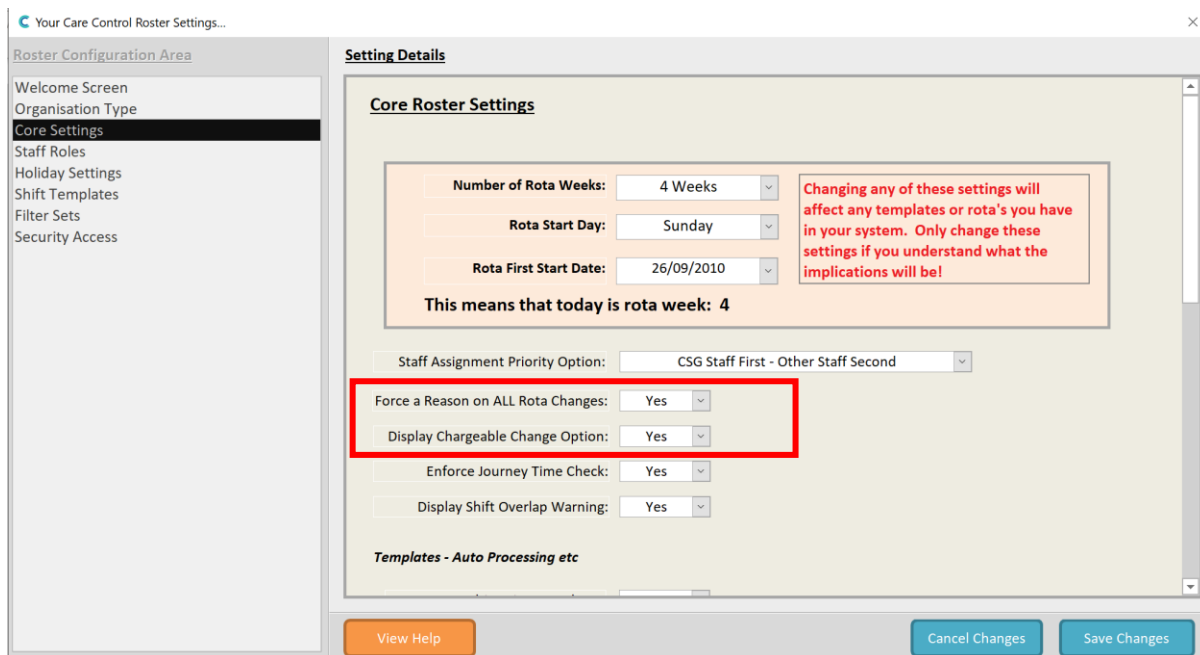
The assignment cannot proceed.

Close

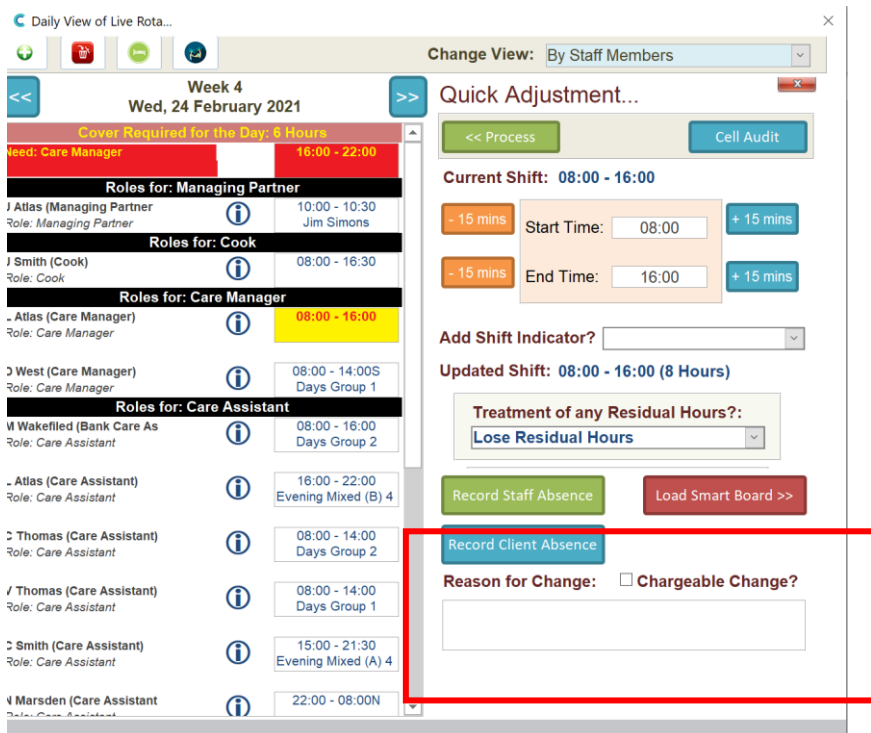
The system will not allow you to enter this visit.

Add reason for change on rota changes

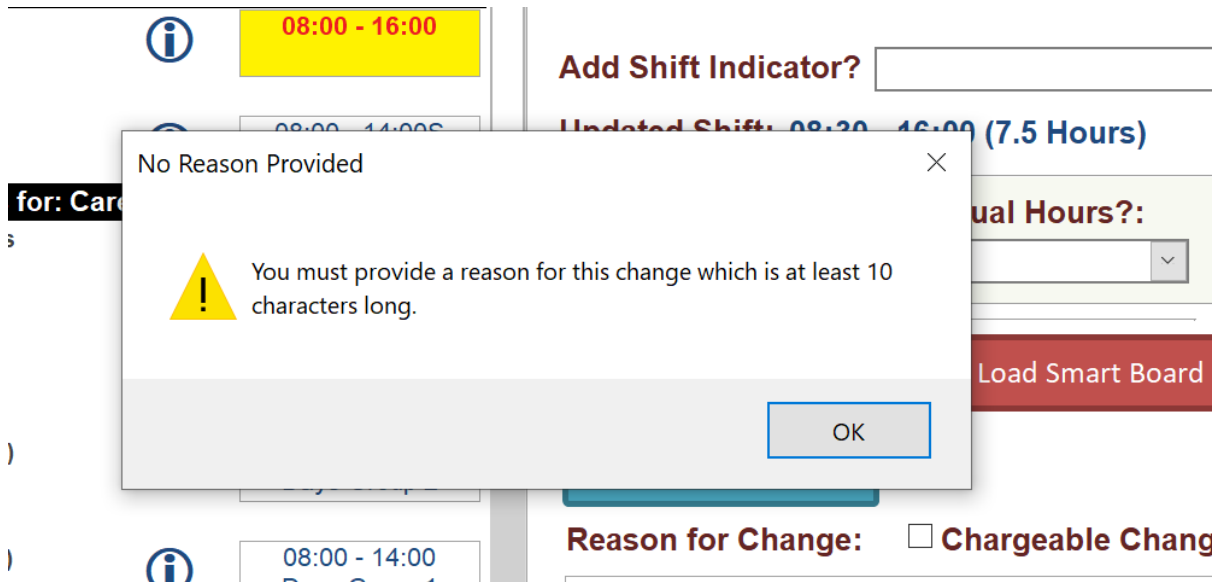
There are two further settings added to the Roster System: -



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.