Practitioner/ Co-ordinator
V2.1

Document	CM – Practitioner/ Co-ordinator
Purpose	Role specific guide focusing on what a practitioner/ co-ordinator will do on CM.
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Purpose of the guide

1. There are four separate roles on CM – Scheduler (Planner), Practitioner/Co-ordinator, Admin and Support Assistant. This guide is for those in the practitioner/co-ordinator role. I will be covering the process behind CM and what both reablement and extra will need to do.

2. If at any point you require support:
    a. Ask your superusers and your colleagues. They may be able to guide you in the correct direction.

3. If at all, you are still struggling and/or this guide needs updating/ tweaking or correcting please:
    a. Submit an eForms to Adults System Support via this link: eForms

4. Please be aware, that any new versions are available on TriX. The version and version control at the bottom of the document will assist you with this. Please ensure you are using the most up to date version of the document.
    a. Link: TriX

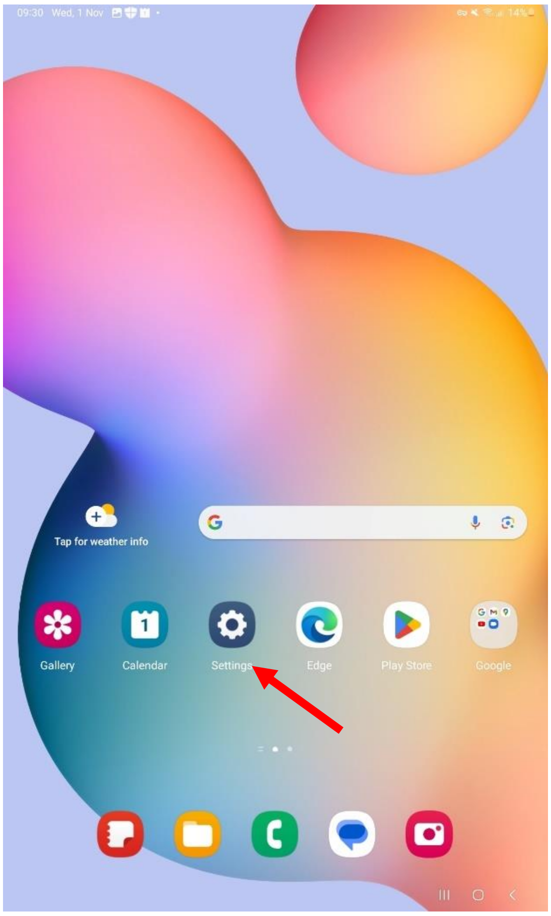
Access

1. As a practitioner/ co-ordinator it is important to realise you have access to the most areas: CM Mobile, CallConfirmLive! and Access Portal. This means there are a few steps on different devices to make everything work as they should. With the access section, please follow the steps below and open the email in the laptop version. That way you can save your password to get easy access there, then go back onto your tablet and locate the website. Then you can save your password there and it will be easier to get on CM Mobile application. If you struggle at any point please let your colleagues know however, this will be covered in your CM Fundamental Training.

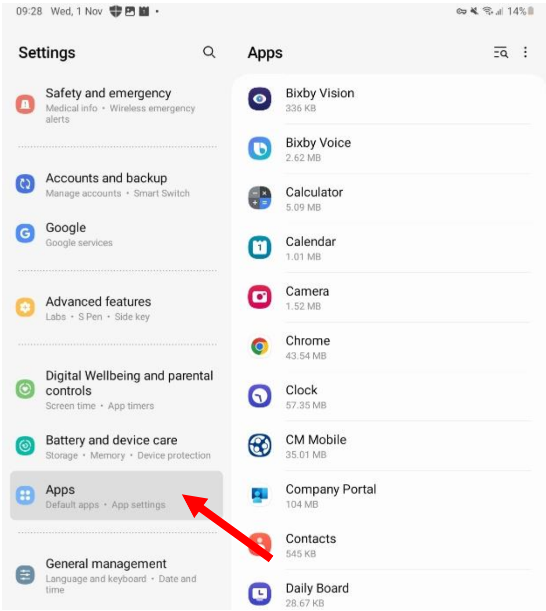
Default App Settings

1. Please ensure you do this first as when you come to save your password for Access it will work inside of the CM Mobile application. Due to you completing pre-visits it is important that your tablet has these settings done as well.

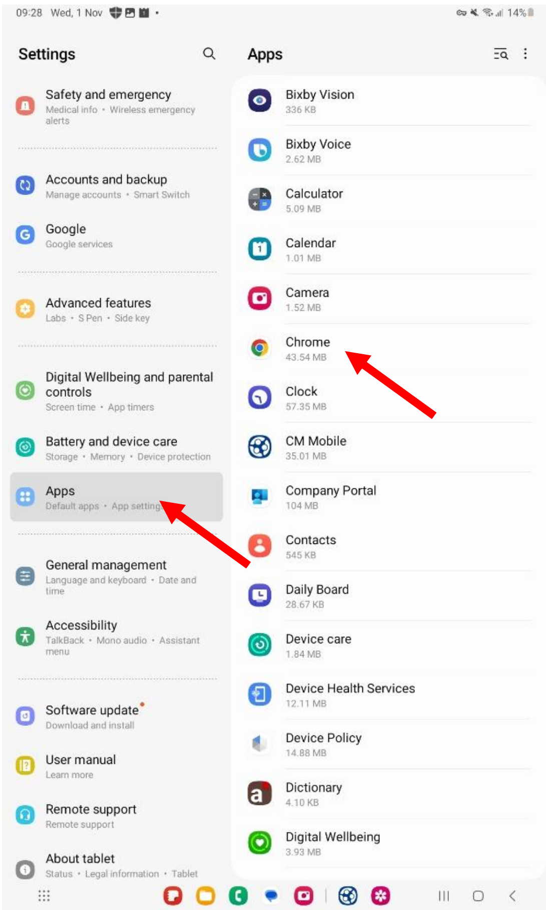
2. Open your tablet and open **Settings**.



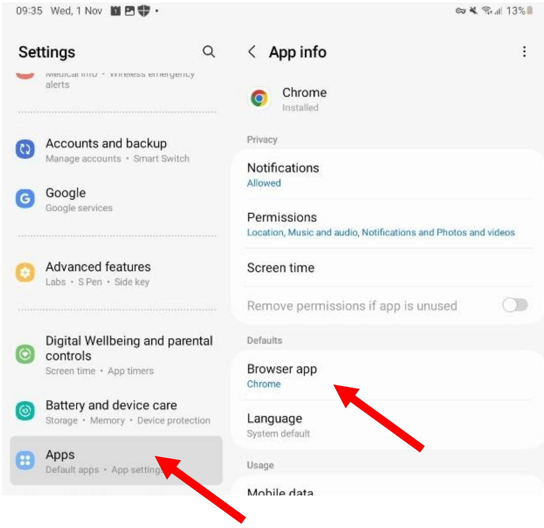
3. On the left, navigate to “**App**”.



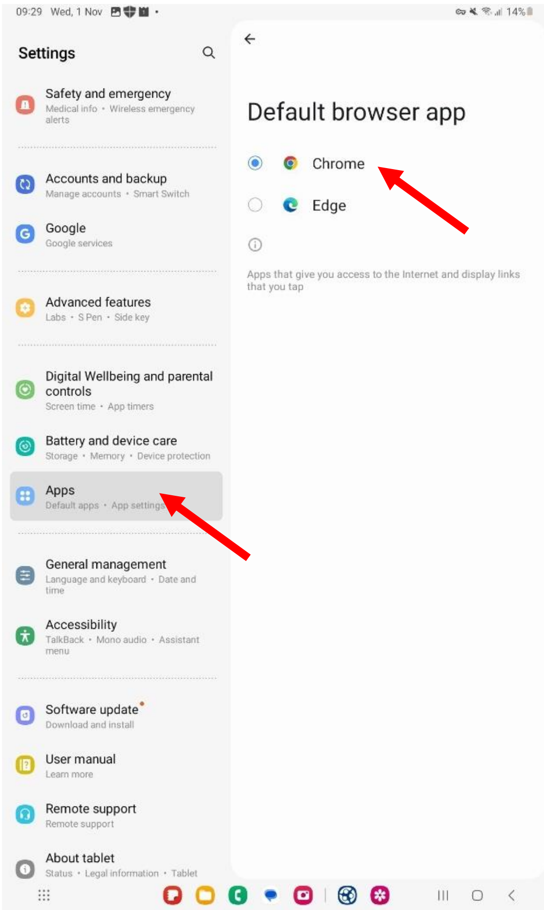
4. Then on the right go to “**Chrome**” and open it.



5. Once selected, it will change screen. Under “**Browser App**” it should say “Chrome”.

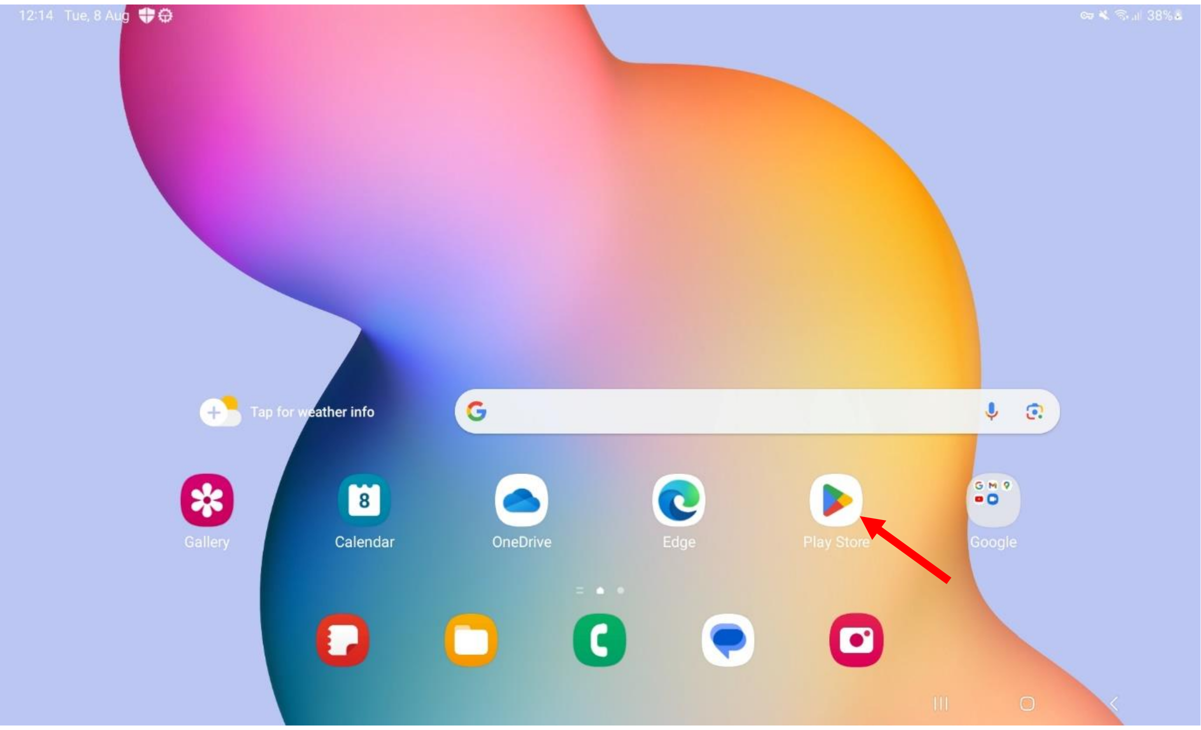


6. If it does not, then select “**Browser App**” and tick box the “**Chrome**” option.

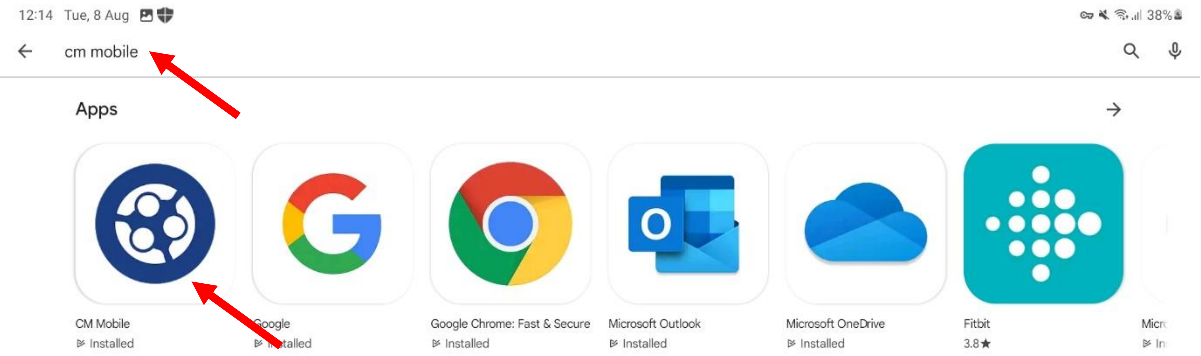


CM Mobile

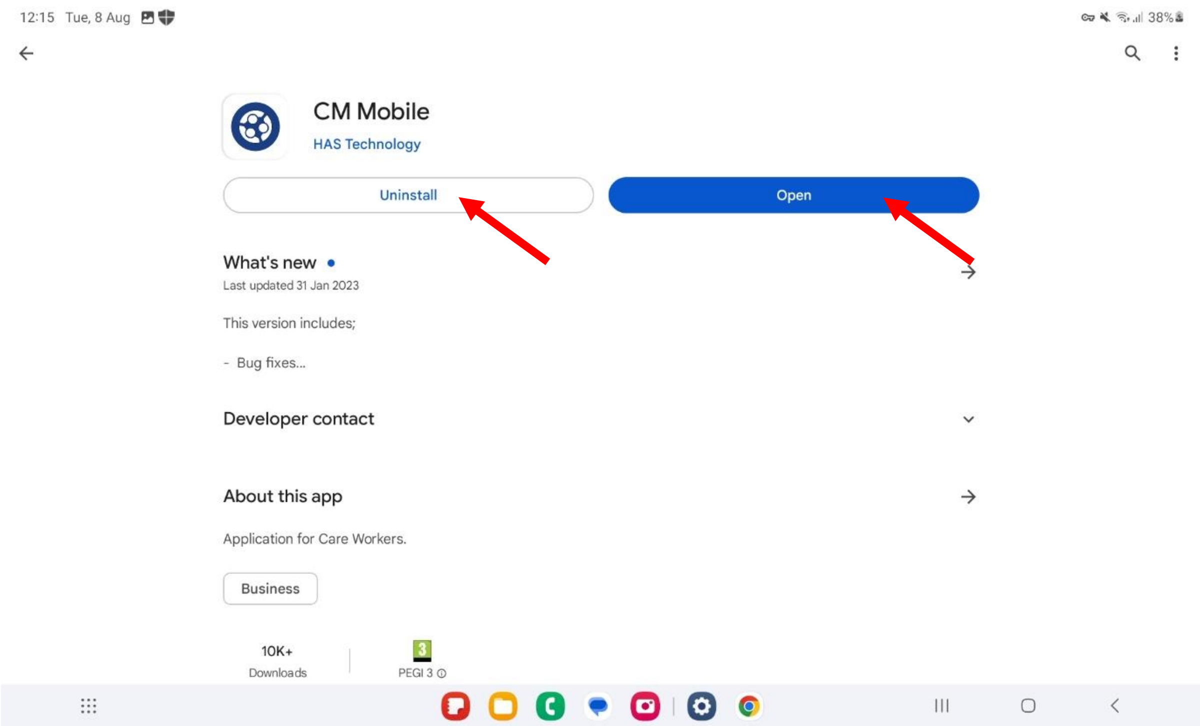
1. Unlock your tablet and find the app "**Play Store**".
   Please Note: These screenshots show the tablet in the vertical position, if you have it horizontal then it will jump to the next screen.



2. Once selected, press the search icon at the top of your screen. Search for "CM Mobile" and select it.



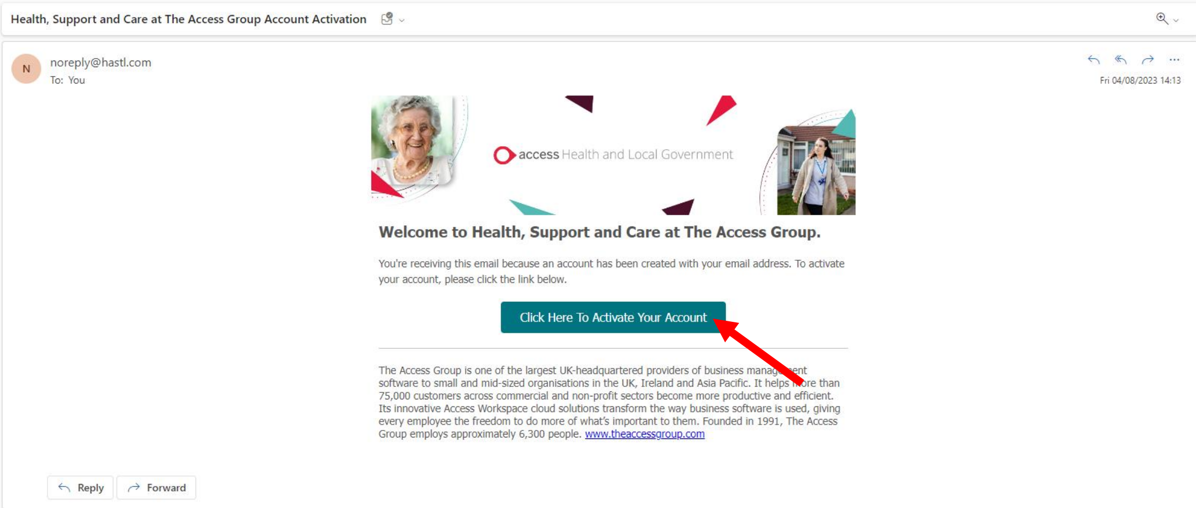
3. It will either say "**Install**" or "**Open**". If:
    a. **Install** – you need to install the app to be able to have it ready.
    b. **Open** – you already have it installed and you do not need to reinstall it.



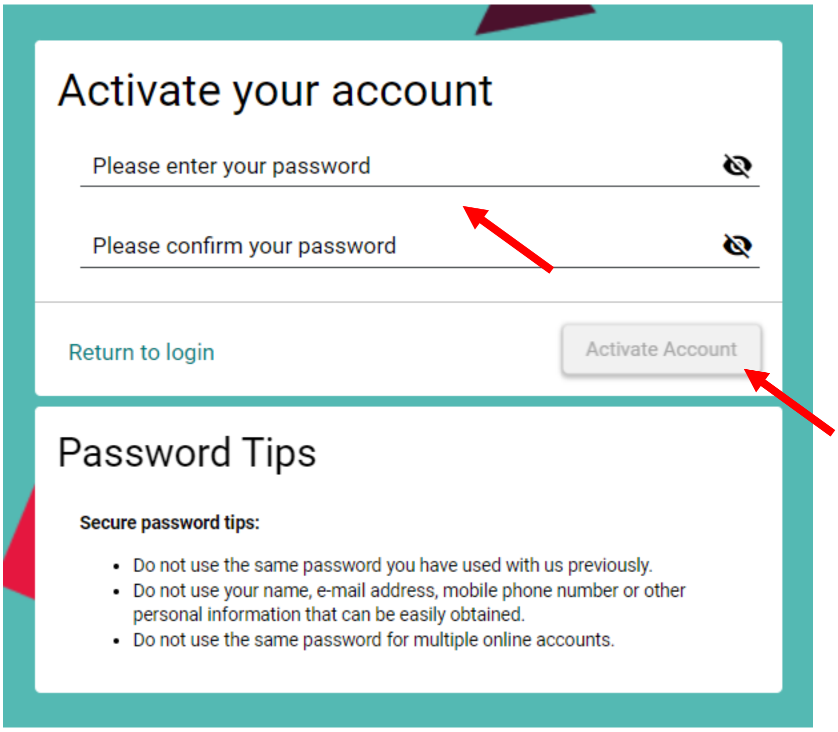
4. Do not worry about log in details yet for CM Mobile as these are going to be provided during your training.

Login/ Password Setup

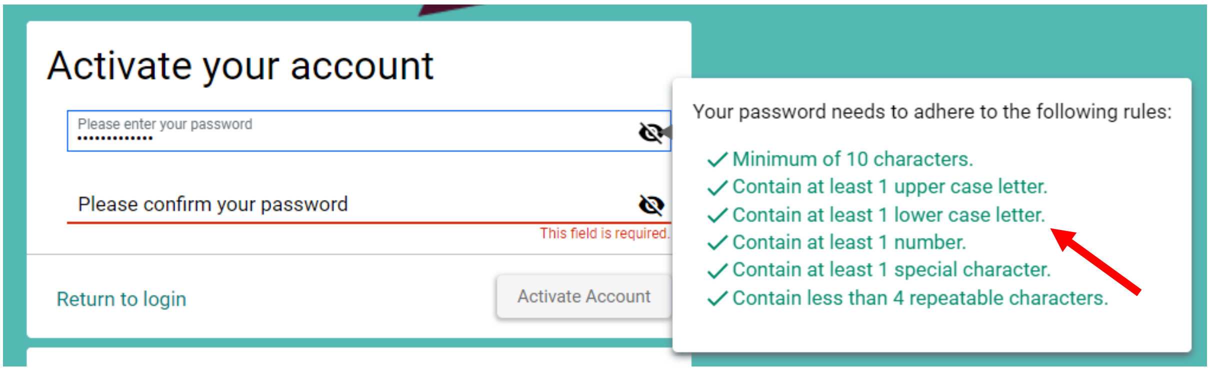
1. Within your emails, you will receive an email from noreply@hastl.com select "**Click here to activate your account**" within that email (please do this on your laptop).
   Please note: If you are not sure if this is the correct email, please ask your superuser or a colleague to check first.



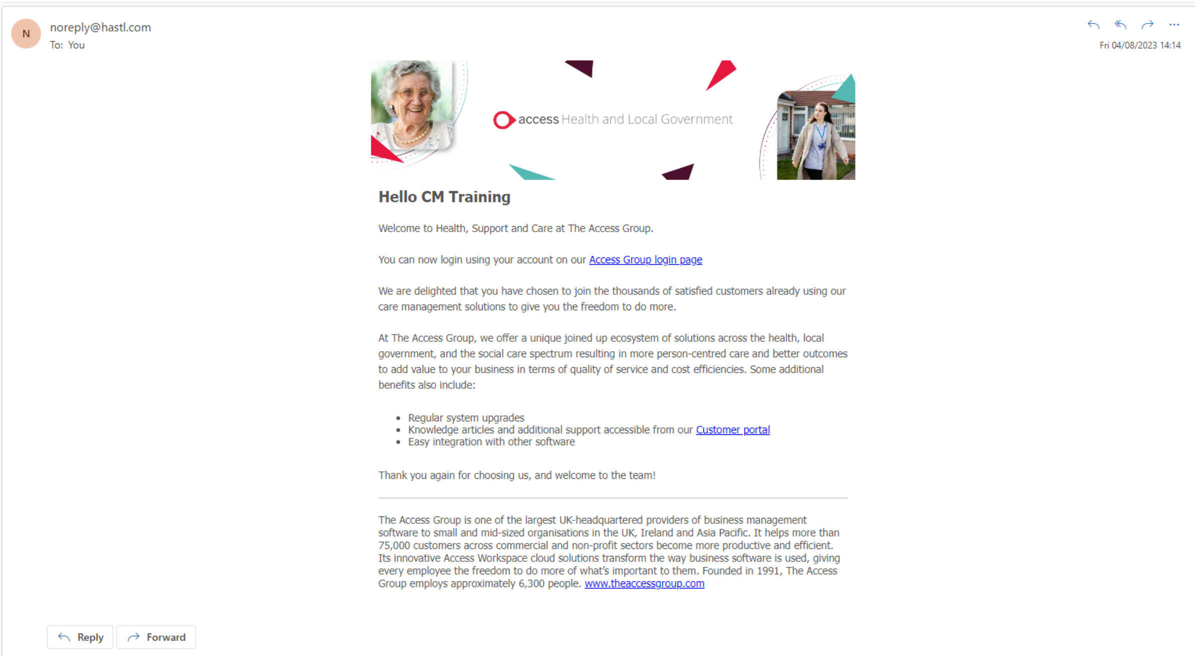
2. After you have selected the **Click here to activate your account** it will redirect you to a website that will ask you to create a new password and confirm it. When you have done so, select **Activate Account**.



3. Please note: When creating your password, you are required to make all the password requirements tick green.



4. After you have successfully created an account, you will receive another email welcoming you to Access.



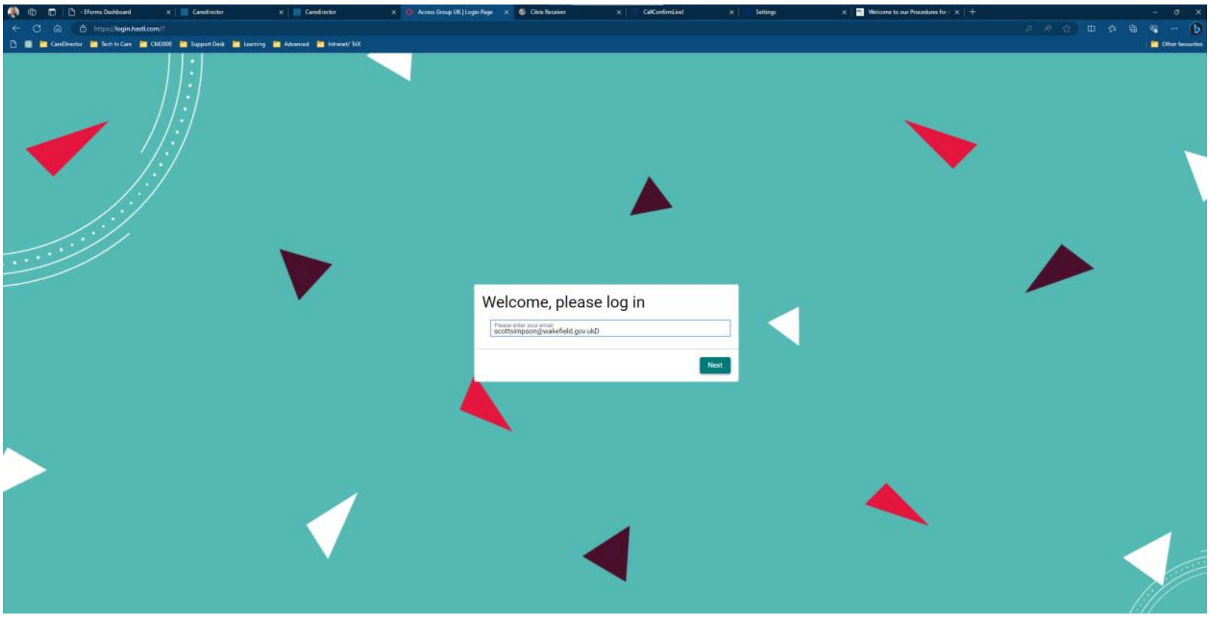
5. Please use your email address and the password you just created for logging into the CM Mobile application and on Access Portal.
   Please note: That when creating your password your browser will ask you if you want to "**remember your password**" and you do. Select "**Got It**" or "**Save**" as this will ensure when logging into Access Portal it will automatically fill in this information.

Laptop Access

1. You are now required to enter CallConfirmLive through the Access portal.

2. Go to **login.hastl.com**

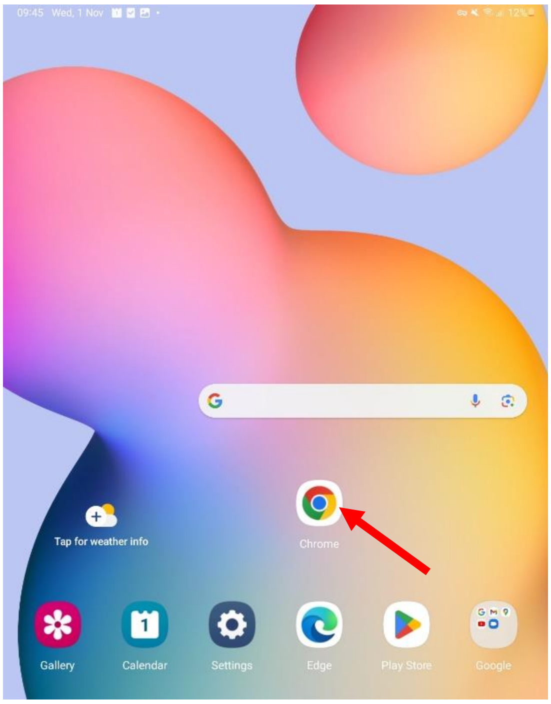
3. Enter your email and password and you then enter the Portal.



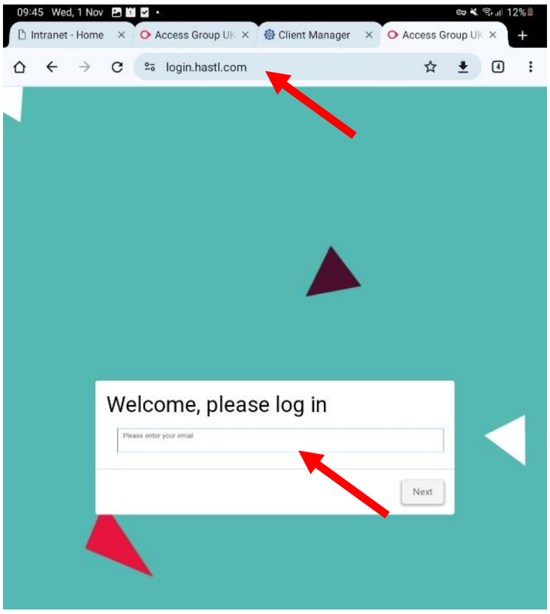
4. To access CallConfirmLive please select the box labelled as such.

Tablet Access

1. Open “**Chrome**” on your tablet and type in login.hastl.com. You will only have to do this once. After this, if done correctly, the system will save your password, so you can quickly log into CM Mobile.



2. Type in your email and password and select sign in. When you have done this, it will ask if you want to save your password and you do. This is useful for when you open CM Mobile it will automatically have your account details there.



Portal

1. The portal is what you will need to access to gain access to portal and CallConfirmLive!

Main Screen

1. This is your main screen. It is built upon different options available to you. When an option is selected it will open the window in a new tab.

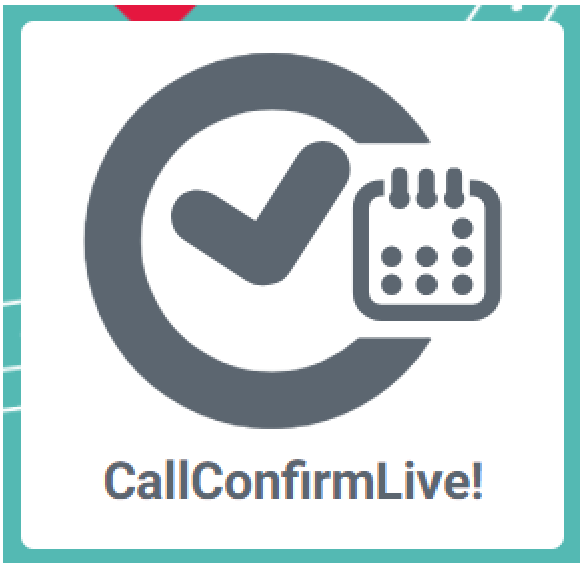
Permissions

1. Your role will dictate what options will be available for you. If you cannot see one of the options listed down below that your role has, please let adultssystemsupport@wakefield.gov.uk know.

Role	Options
Manager	CallConfirmLive Carer Manager Client Manager Visit Manager
Co-ordinator	CallConfirmLive Carer Manager Client Manager Visit Manager
Planner	CallConfirmLive Carer Manager Client Manager Visit Manager
TI	CallConfirmLive Carer Manager Client Manager CM Mobile
OT	CallConfirmLive Carer Manager Client Manager CM Mobile
Practitioner	CallConfirmLive Carer Manager Client Manager CM Mobile Visit Manager
Support Assistant	CM Mobile
Physio	CallConfirmLive Carer Manager Client Manager Cm Mobile

CallConfirmLive!

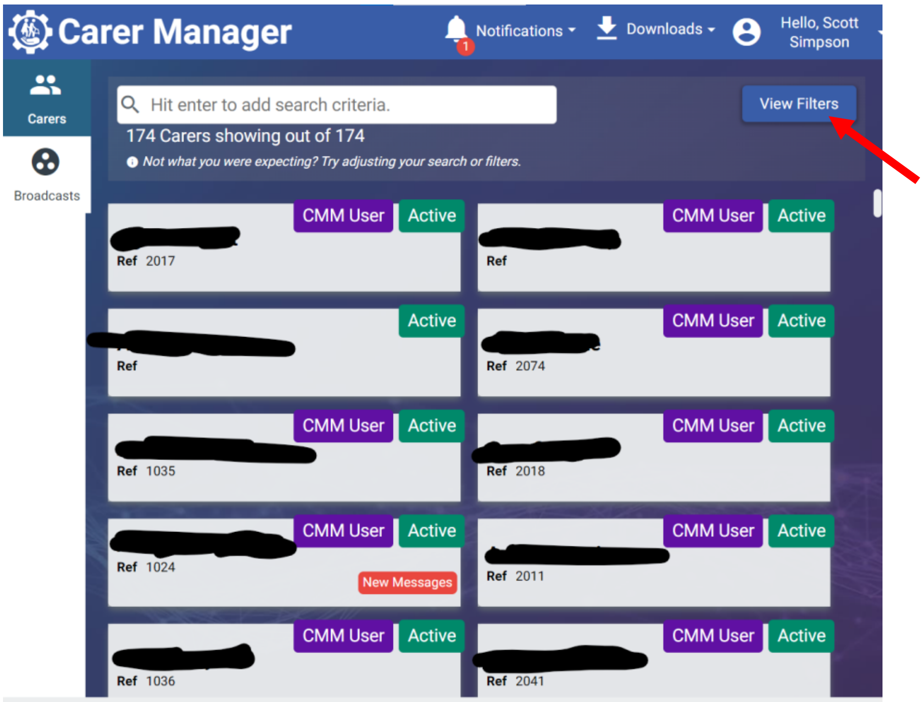
1. CallConfirmLive! is the option to access CCL. This will open the new login screen so please remember your other username and password.



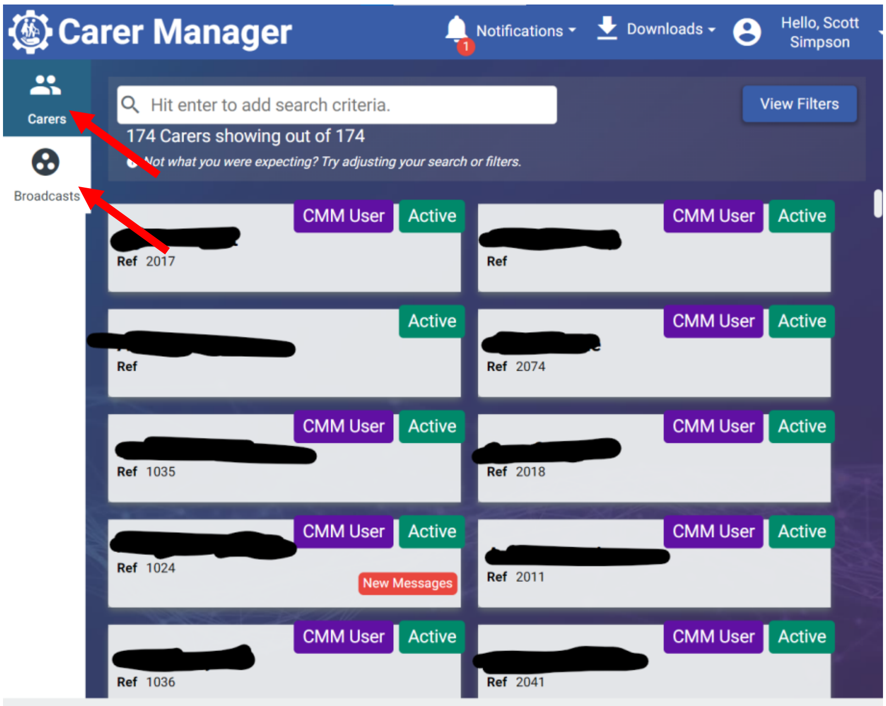
Carer Manager

1. Carer manager is for personal and broadcast messaging.
   Please note: If you want a group to be setup, please submit a request through Adults System Support eForms.

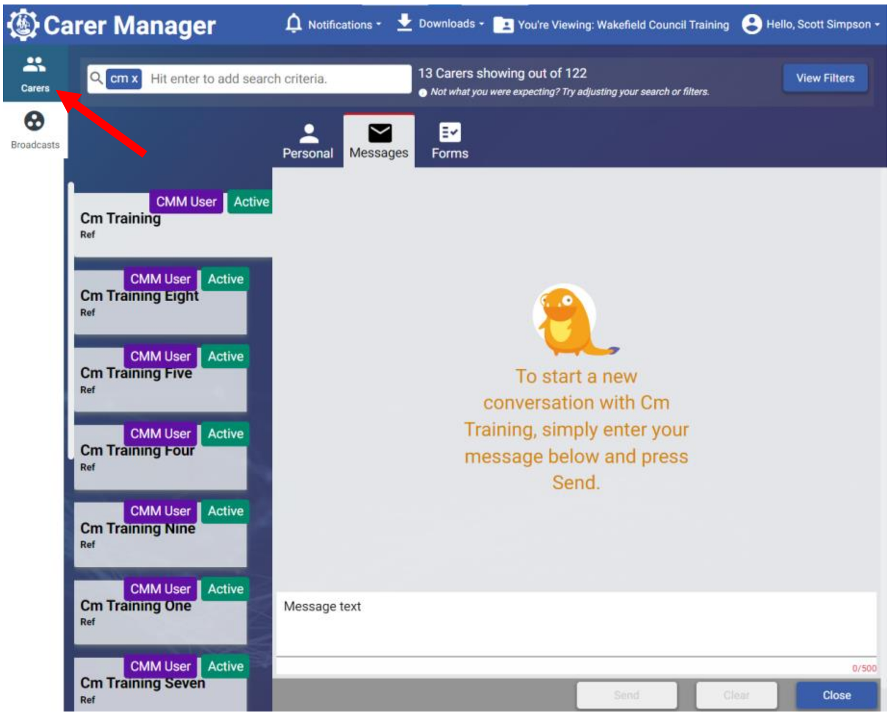
2. When opened you can filter through the results on the top right.



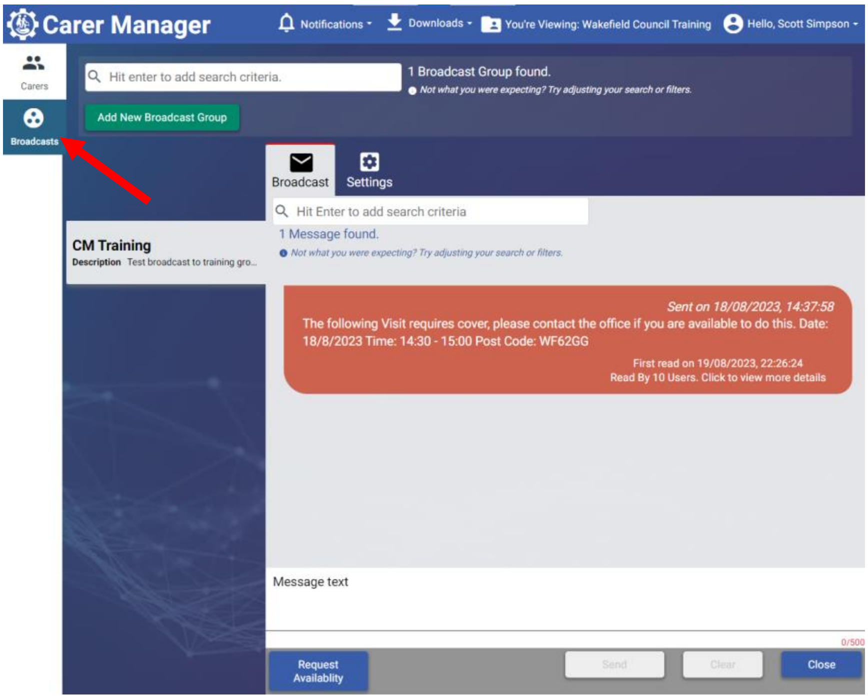
3. On the left you can choose from “Carers” or “Broadcasts”
    a. **Carers**: Individual personal messages
    b. **Broadcasts**: Group broadcast messages



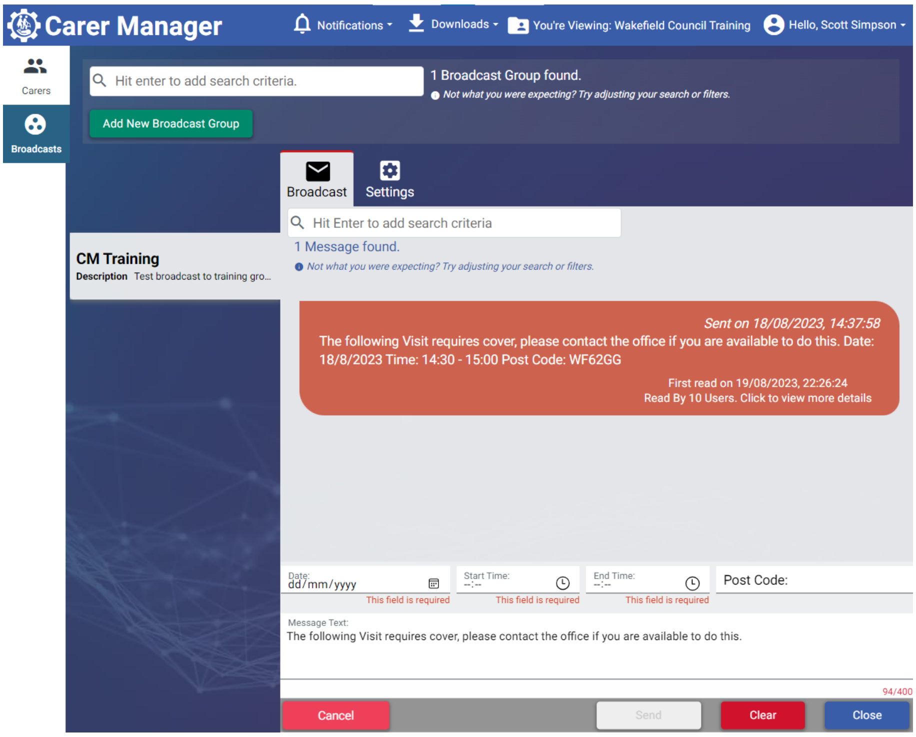
4. Whilst on “**Carers**” select someone from the list or search or filter down the options first. Once selected, their profile will open with different tabs above. Messages will allow you to send messages personally to that carer.



5. Whilst on “**Broadcasts**” select a group chat from the list. The same rule will apply, different tabs will appear both broadcast and settings (this will allow you to change personnel inside of the group.



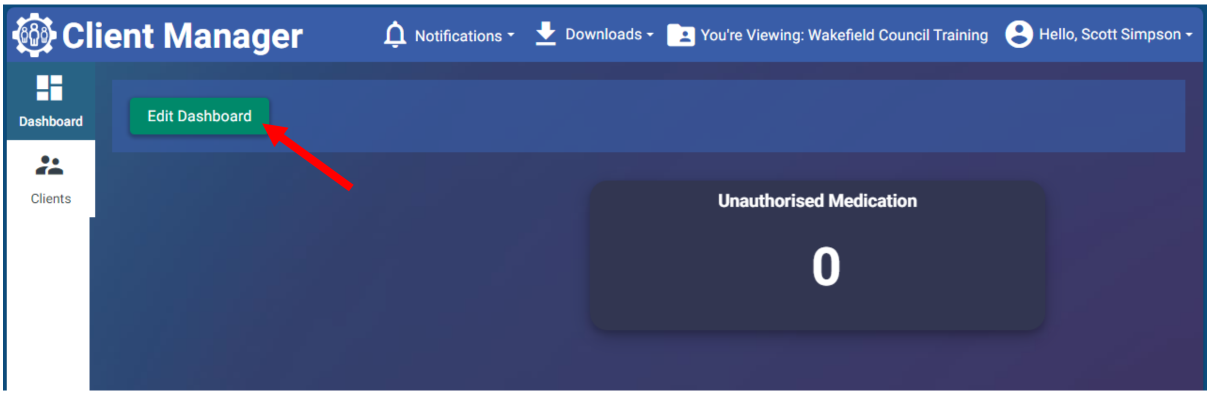
6. To request availability of staff, select the “**Request Availability**” option on the bottom left of the screen. A new box will appear asking what date, start/ end date including postcode. This is what visit you are asking someone to cover.



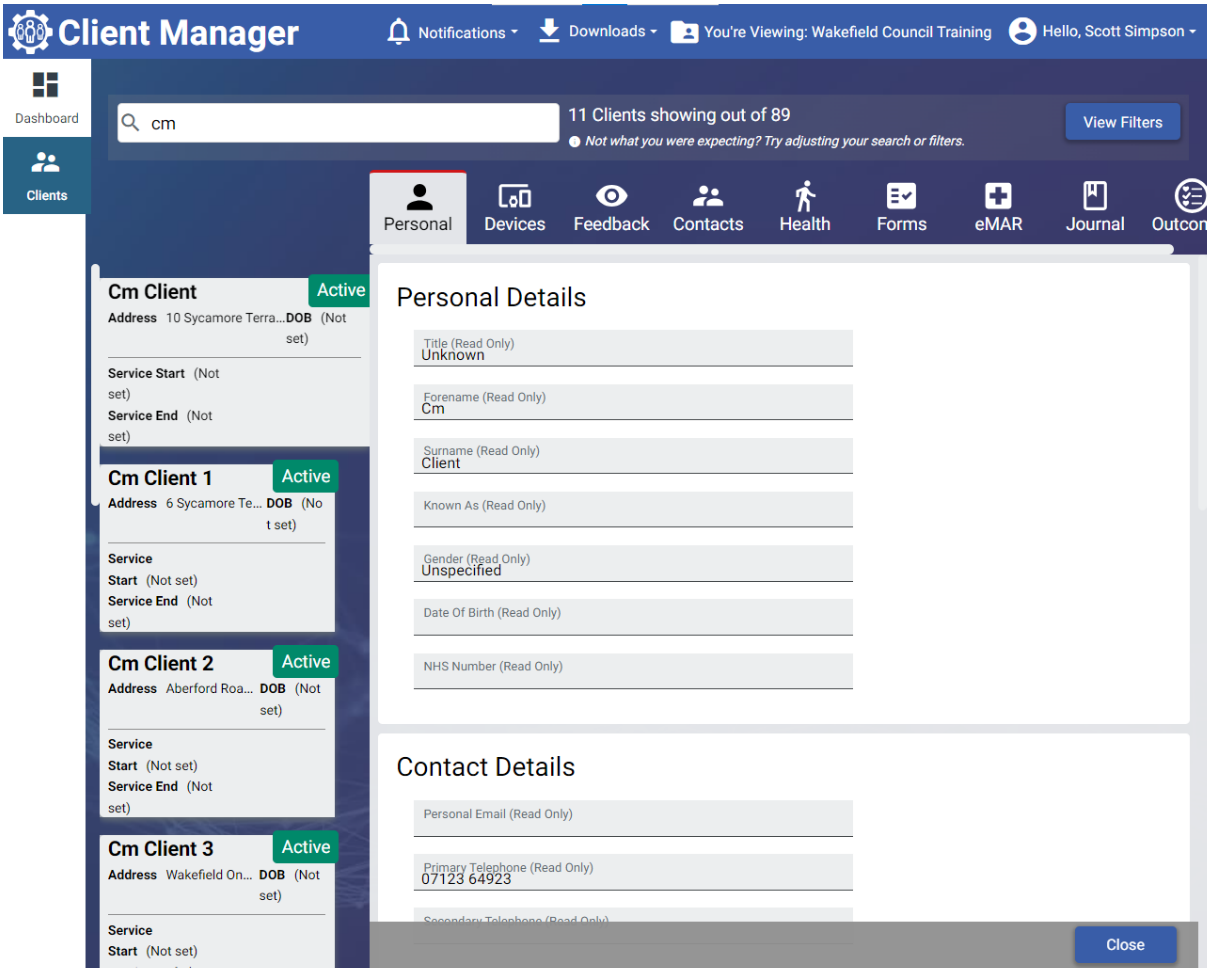
Client Manager

1. When client manager is for forms, client details, allergies, client feedback, contacts, eMar, Journal and Outcomes.

2. When opened, you will first see the "**Dashboard**" screen. This can be tailored to what you need to see. Select "Edit Dashboard" to make those reporting changes.



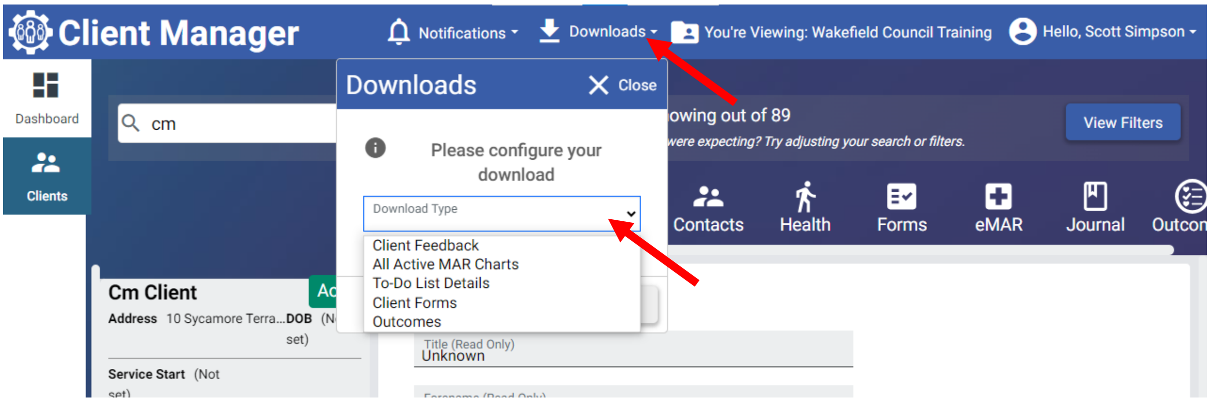
3. When “**Clients**” is selected, a new window will appear with all the clients in the CallConfirmLive database. Feel free to filter or search specifically otherwise select a client and then it will open a screen with a bunch of tabs.



4. These are the differences in the tabs:

Tab	Purpose
Personal	Will show all personal information about that client.
Devices	Not applicable.
Feedback	Shows all client feedback when it comes into CM Mobile.
Contacts	Any key contacts that can be used for that person.
Health	Allergies
Forms	Forms will be available here when it is implemented.
eMar	Medication forms will be available here when it is implemented.
Journal	Shows all visit logs created by a Support Assistant during the visit.
Outcomes	Shows progression notes compared to outcomes. This is the place to create them.

5. "**Downloads**" is also available for when you need to download a cluster of information about a particular topic.
   "**Downloads**" > "**Download Type**" > **Select**.



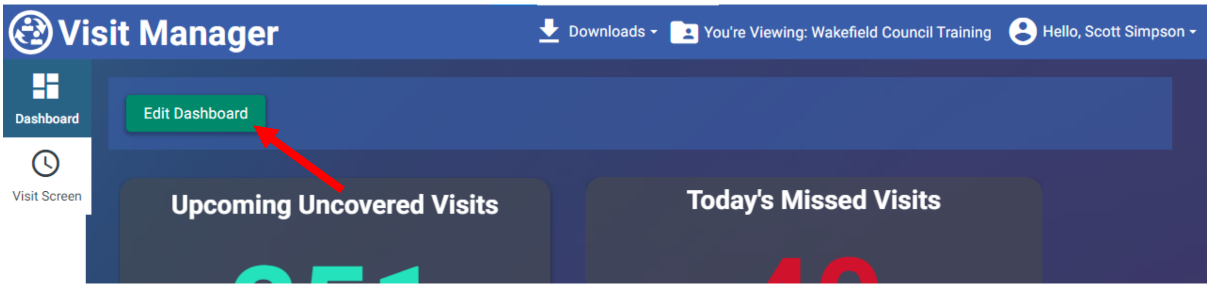
CM Mobile

1. There is no functionality to this option. It is just showing you have access to CM Mobile.

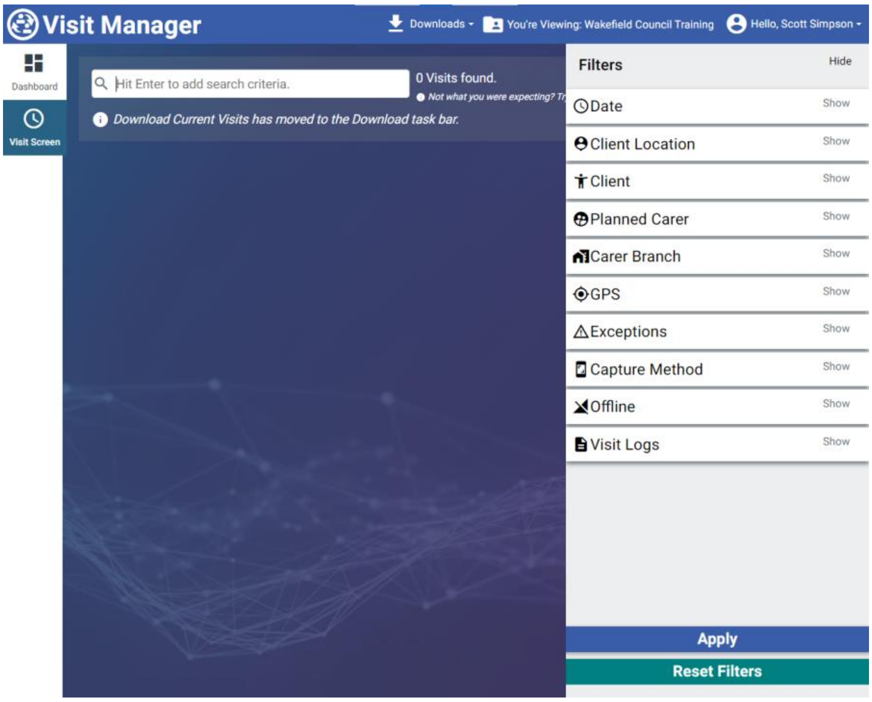
Visit Manager

1. Visit manager is responsible for showing you information about the visits scheduled for the same day you are looking at it.

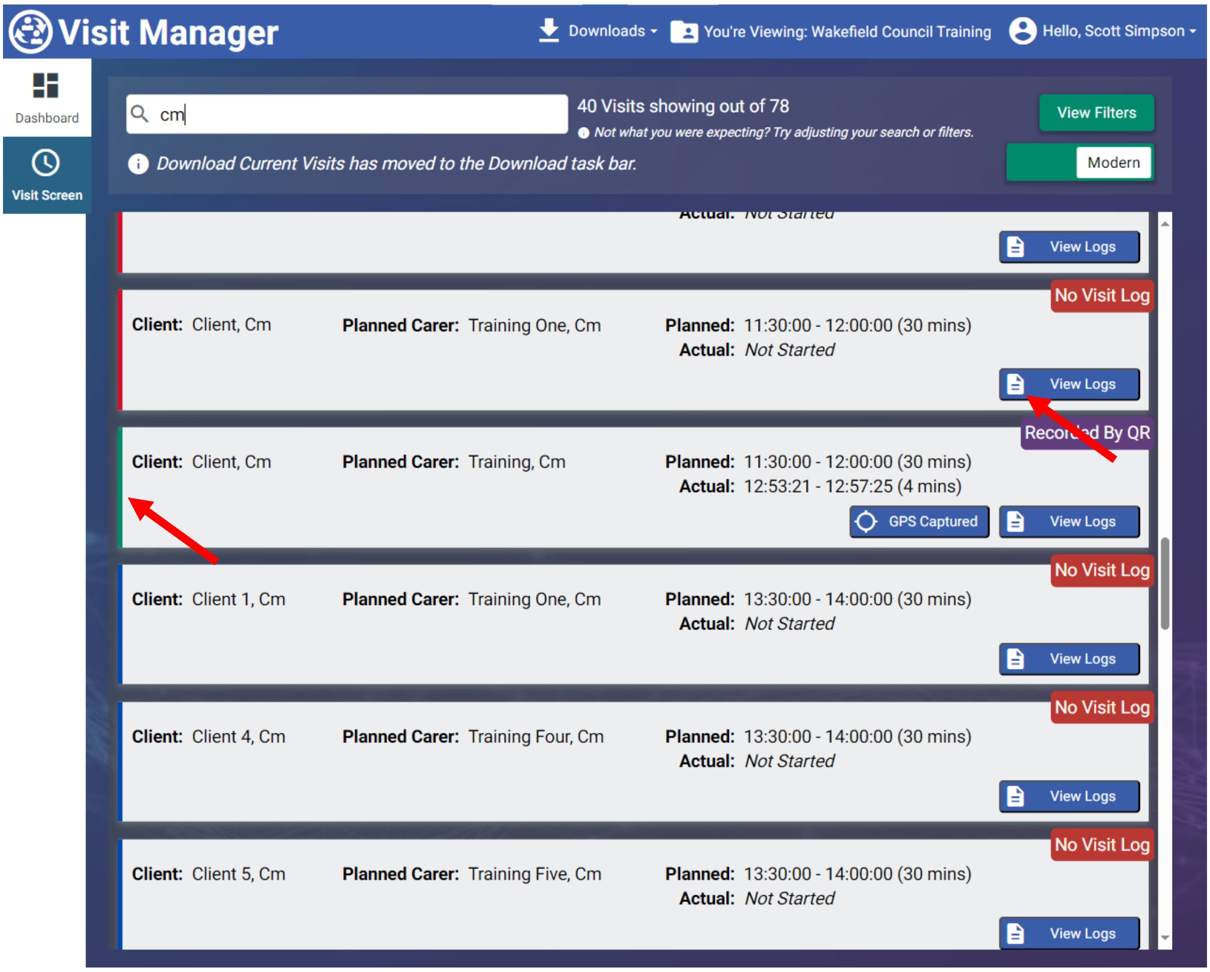
2. When opened, you will see an "**Edit Dashboard**". Again, select "**Edit Dashboard**" and change the widgets to your preferences.



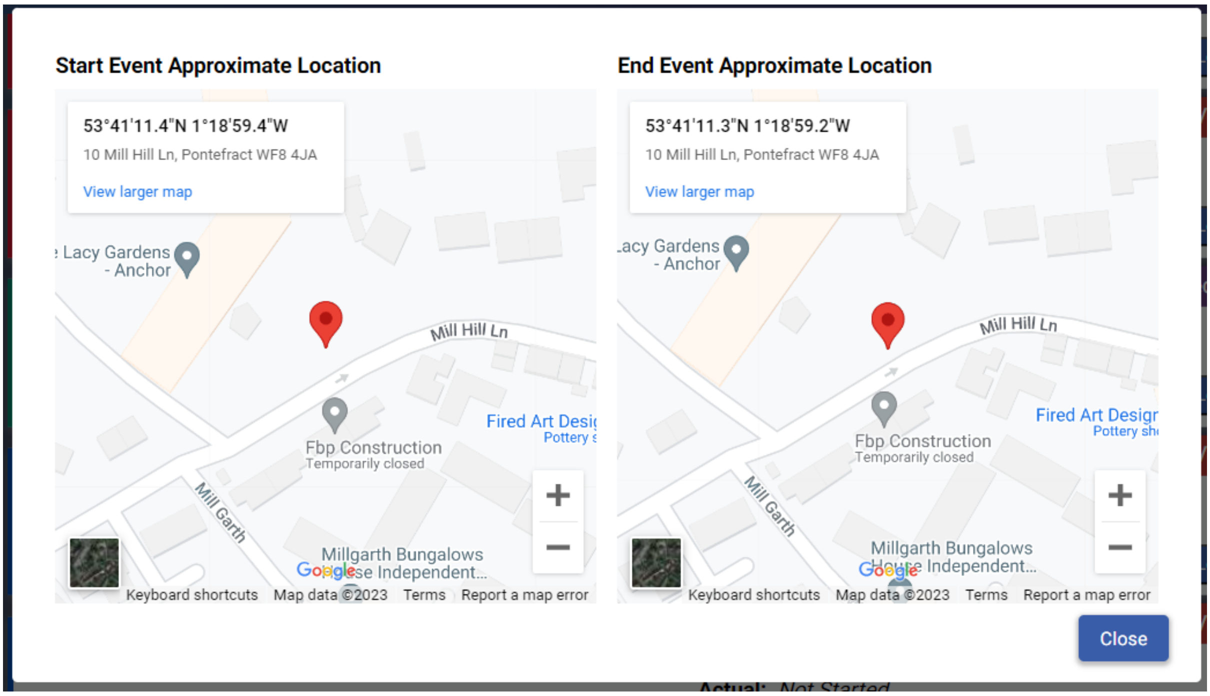
3. Under "**Visit Screen**" it will ask you to filter your results first. You do not need to do this so just select off it, however they are there if needed.


Visit Manager
Downloads
You're Viewing: Wakefield Council Training
Hello, Scott Simpson
Dashboard
Visit Screen
Hit Enter to add search criteria.
0 Visits found.
Download Current Visits has moved to the Download task bar.
Filters
Hide
Date
Client Location
Client
Planned Carer
Carer Branch
GPS
Exceptions
Capture Method
Offline
Visit Logs
Show
Apply
Reset Filters

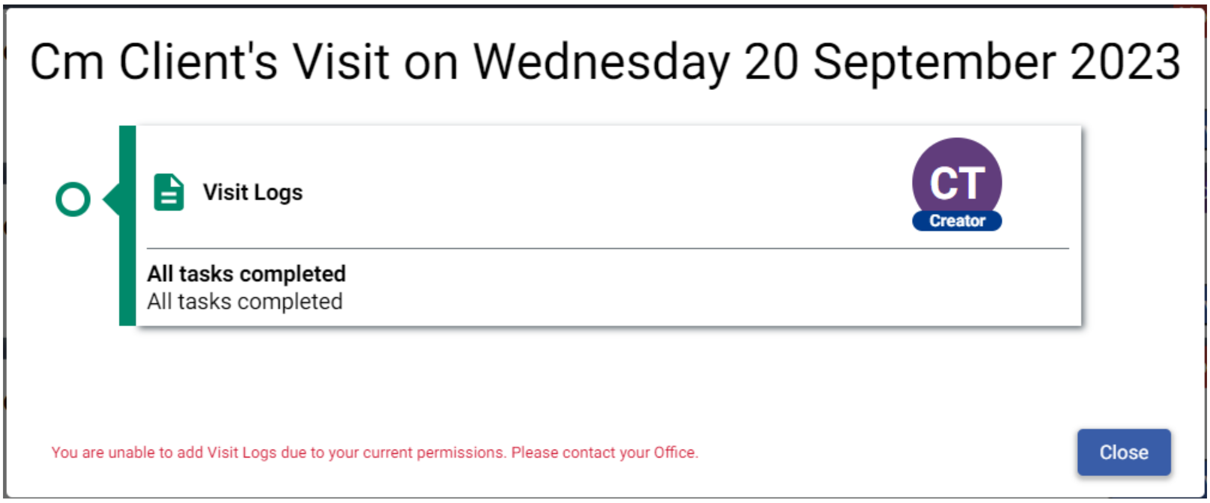
4. The list is a 24-hour clock of visits that have been planned and unplanned visits. The colour on the left shows red, yellow, green, or blue according to if they've been missed, arrived, completed, or not started yet. The client and Support Assistant shows who was seen and who went. The actual time shows when they arrived. "**View Logs**" show the visit log updates the Support Assistants make during the visit.



5. There is also "**GPS Captured**" – this is going to show an approximate location of where the QR code was scanned. This will support those occasions where there is an event of "the carer never arrived today".



6. "**View Logs**" will show what has been noted down as a visit log. This can be changed if required.

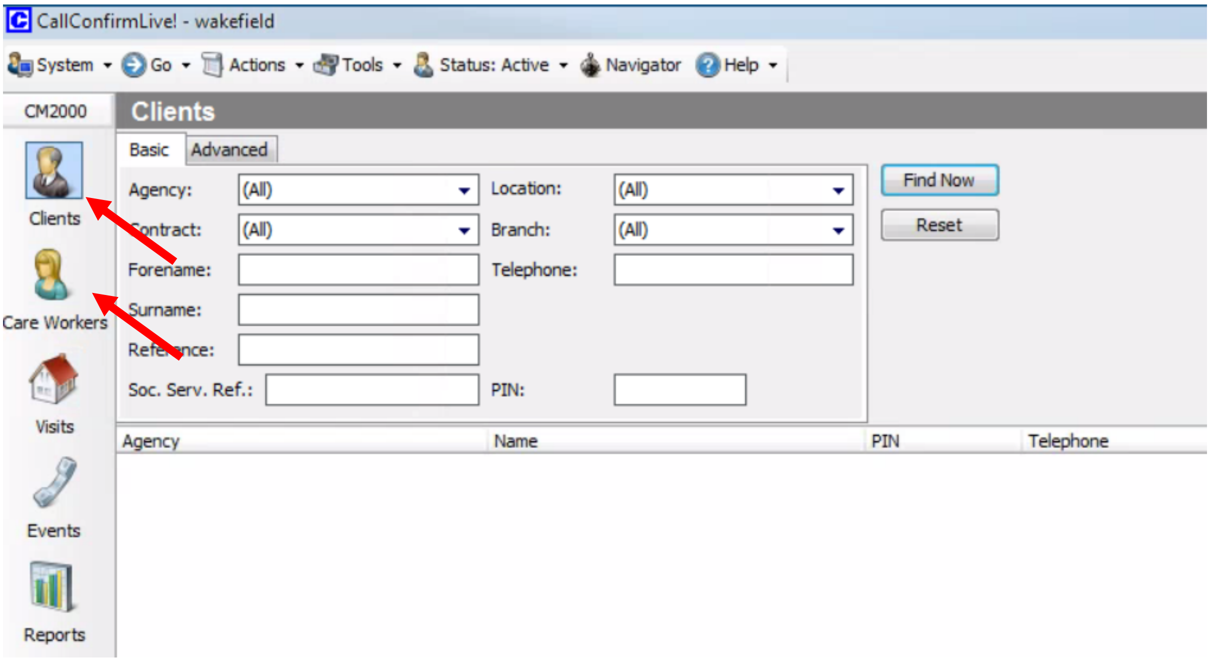


CallConfirmLive!

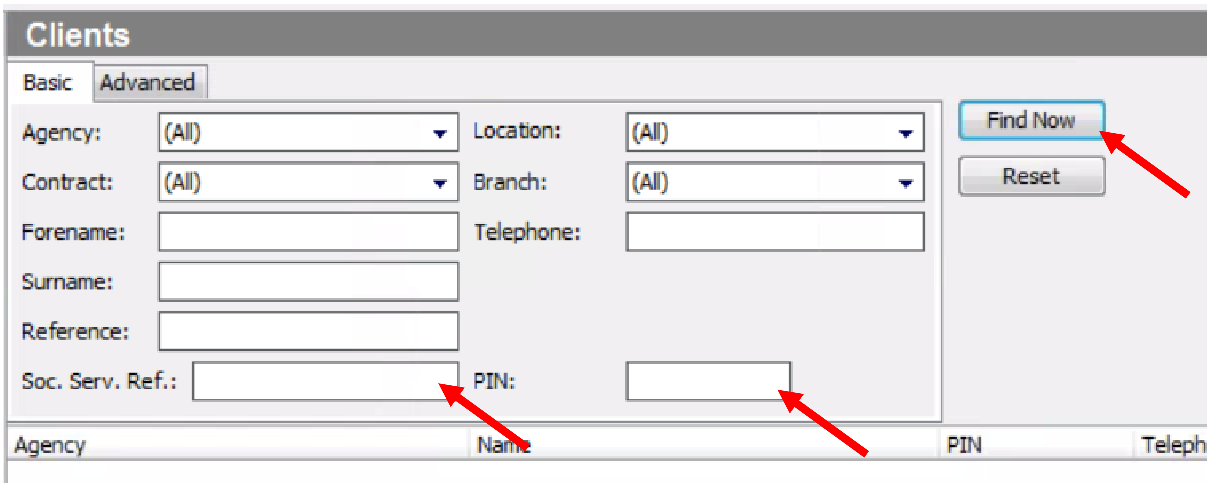
Search

1. The search functionality repeats itself throughout searching for clients and carers on the system.

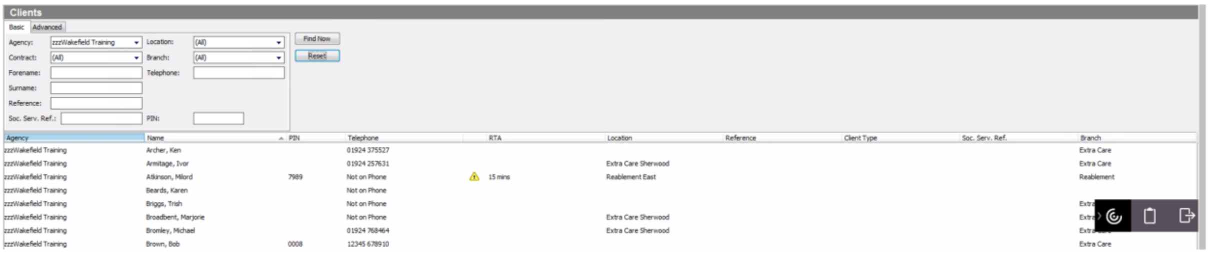
2. Select either "**client**" or "**Care Workers**" from the left toolbar.



3. Type and filter your search appropriately. Select "**Find Now**" to search based on your filters.
    a. Soc. Serv. Ref.: Caredirector ID
    b. PIN: Assigned ID given by CM



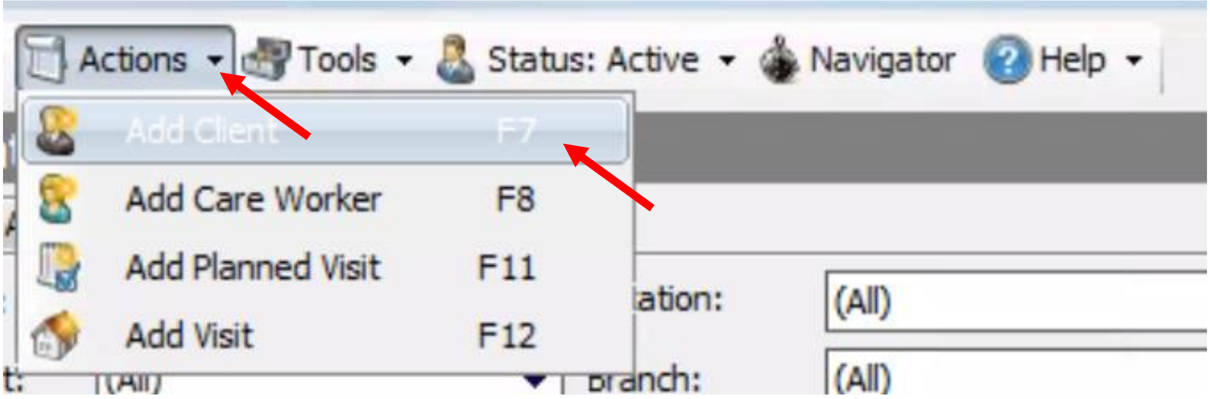
4. Double click the entry from the list below.



Creating Clients (Reablement Only)

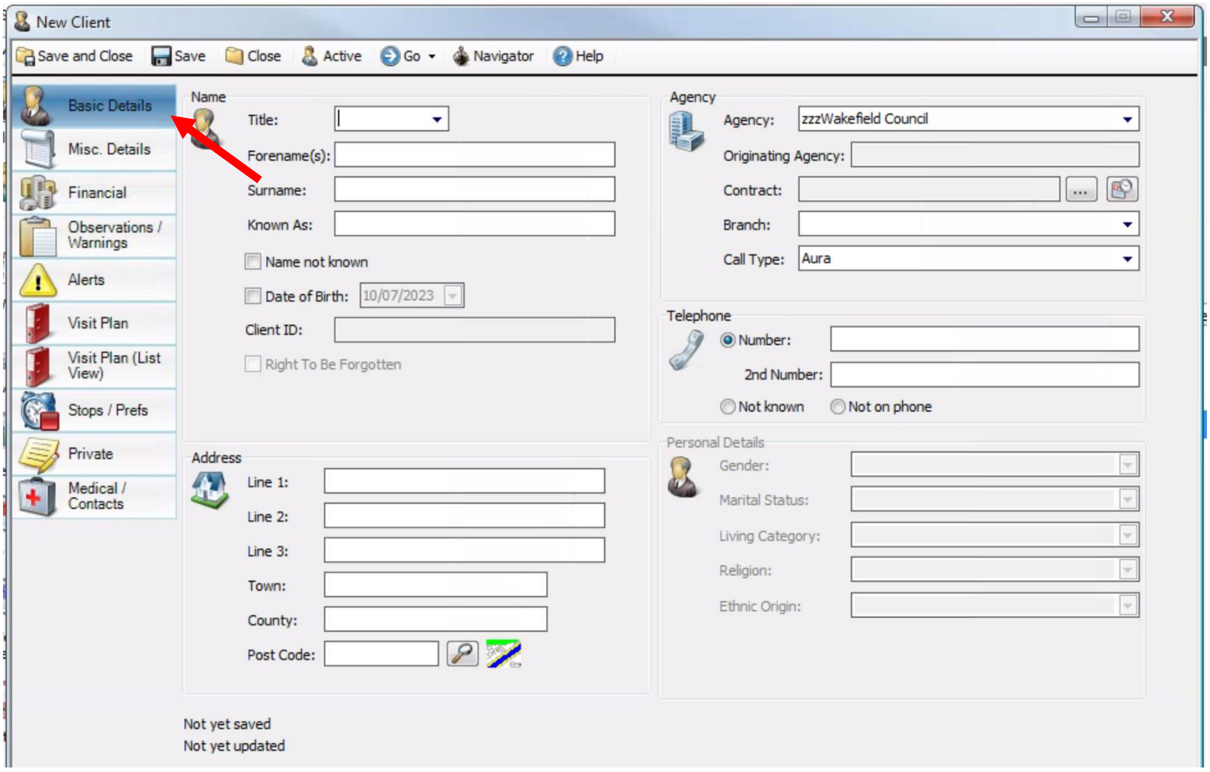
1. During the evening and weekend shifts, clients may need creating. This allows the practitioner/ co-ordinator to schedule visits.
   Please note: You are not creating a visit plan; this is so you can create one/ multiple visits. The planner will create the visit plan.

2. To create a client, go to the top toolbar and select "**Actions**" or press "**F7**" on your keyboard.

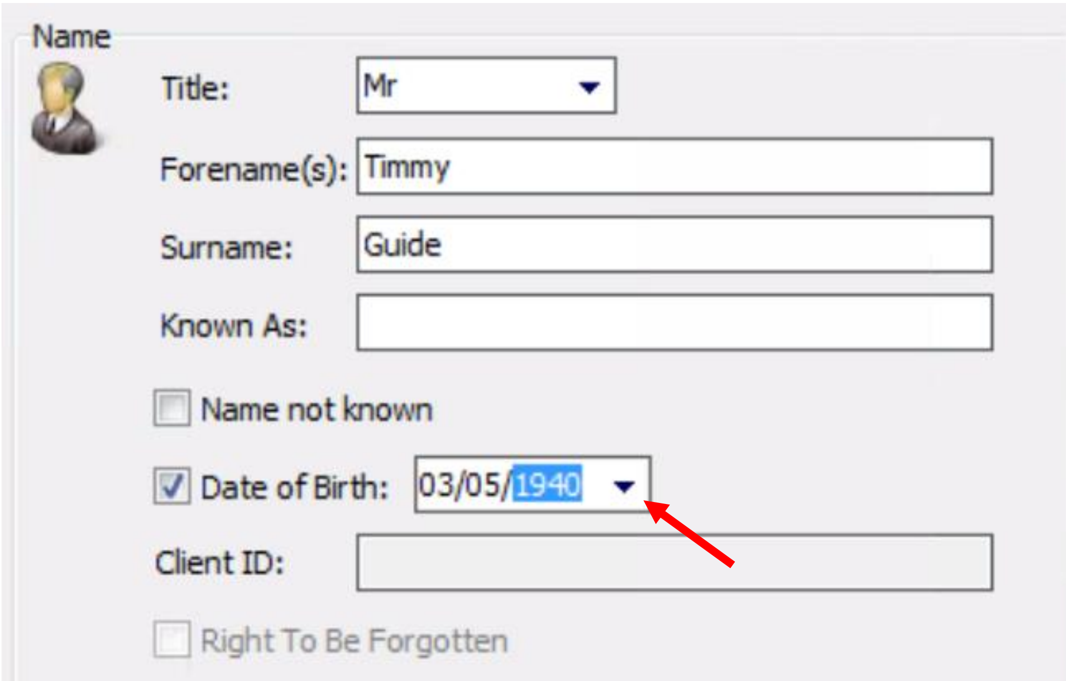


Basic Details

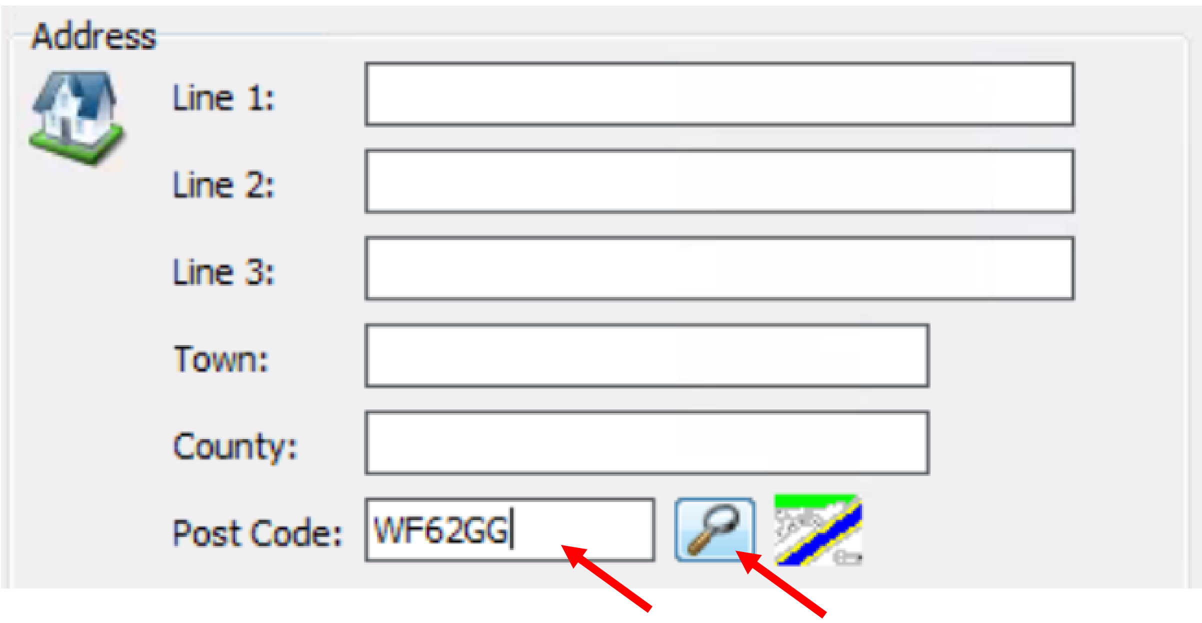
1. This will open a separate window, only the "**Basic Details**" tab will be visible to input any details. You cannot edit other tabs until the "**basic details**" section is "**saved**."



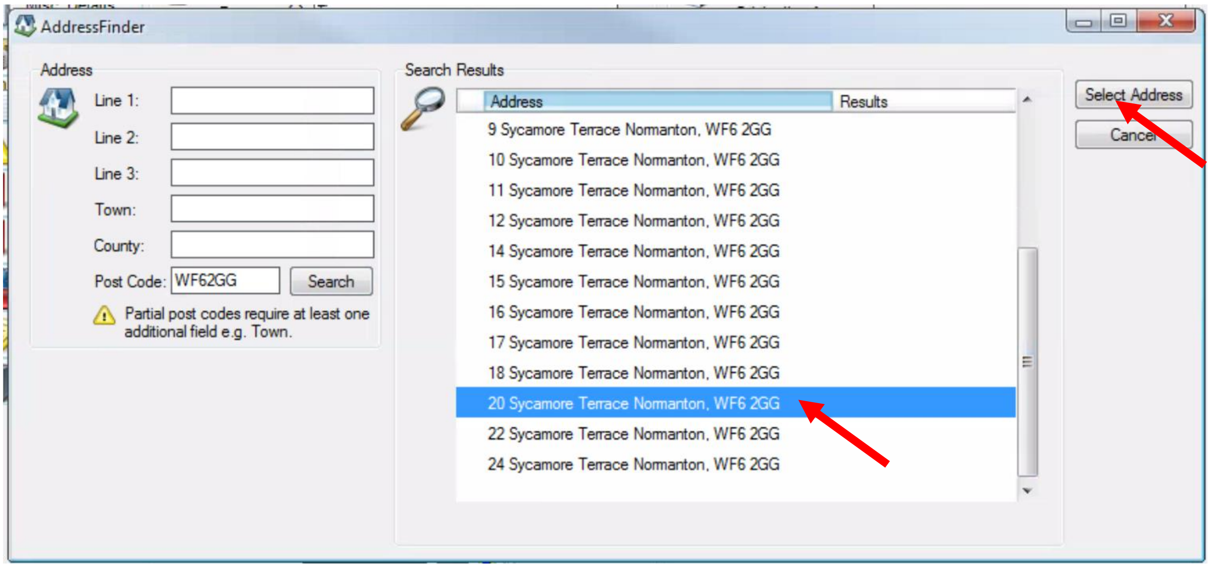
2. Name section:
    a. Type in their basic details where known.
    b. For the "**Date of Birth**" section, select the checkbox to be able to make changes rather than the dropdown box for the calendar, click on the numbers in each section, Day, Month or Year and manually type in the date.



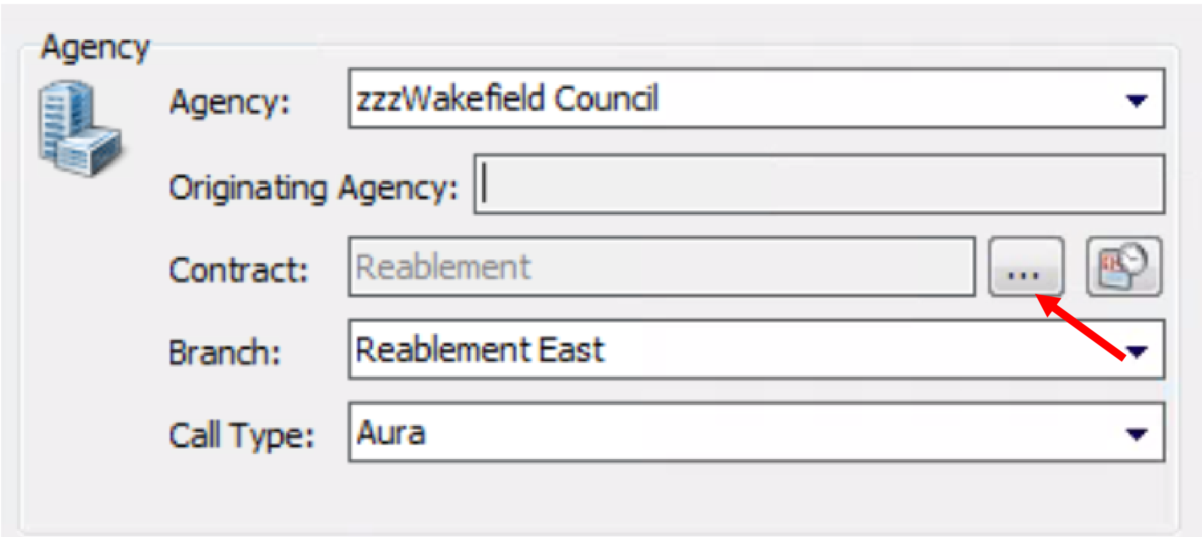
3. Address section:
    a. Type in the **postcode** first then select the magnify glass. (Do not include a space, type it as one continuous string).



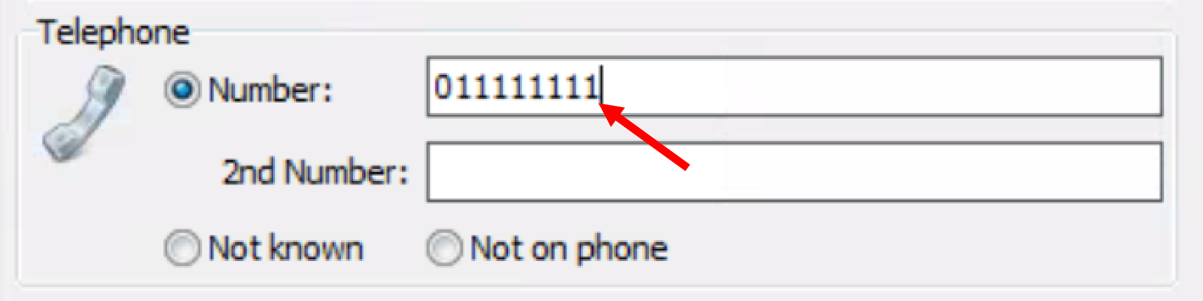
b. After selecting the magnify glass, a new list will appear with street name information. Select one from the list by clicking and going over to "**Select Address**."



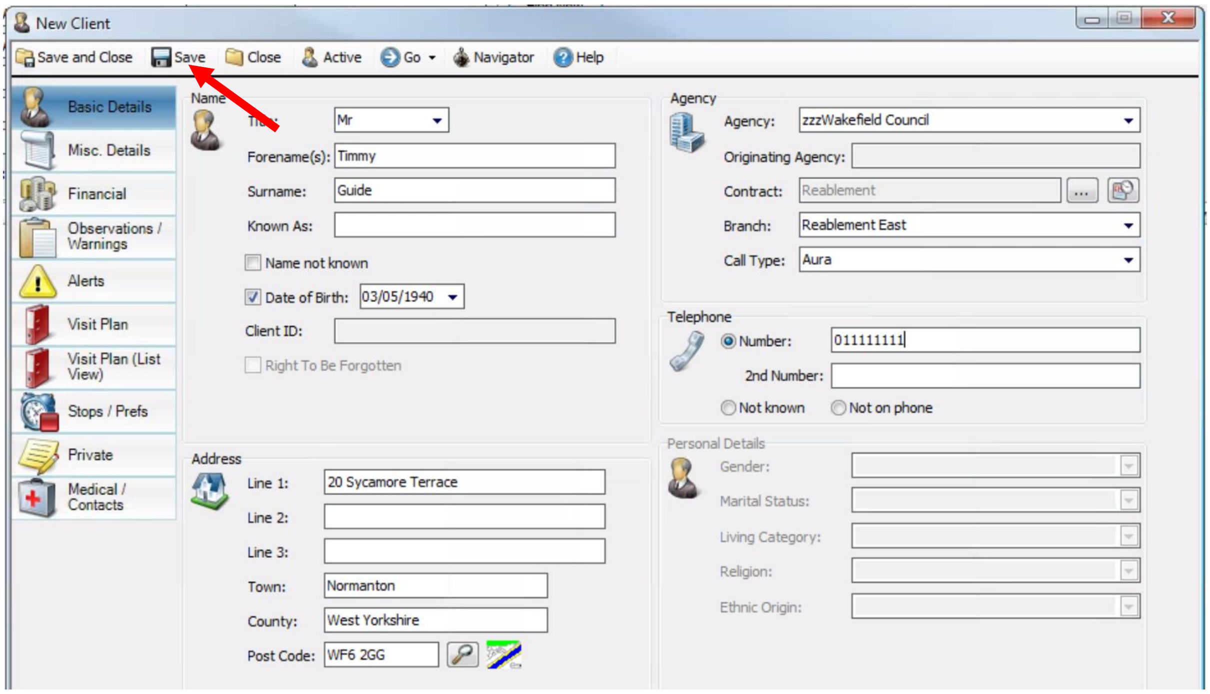
4. Agency section:
   a. **Agency**: This should be set correctly by default.
   b. **Contract**: Select the three dots and select who is responsible for the client.
   c. **Branch**: Select appropriate



5. Telephone section:
    a. Type in the relevant phone number.
    b. Add point of contacts later; this is the clients contact information.

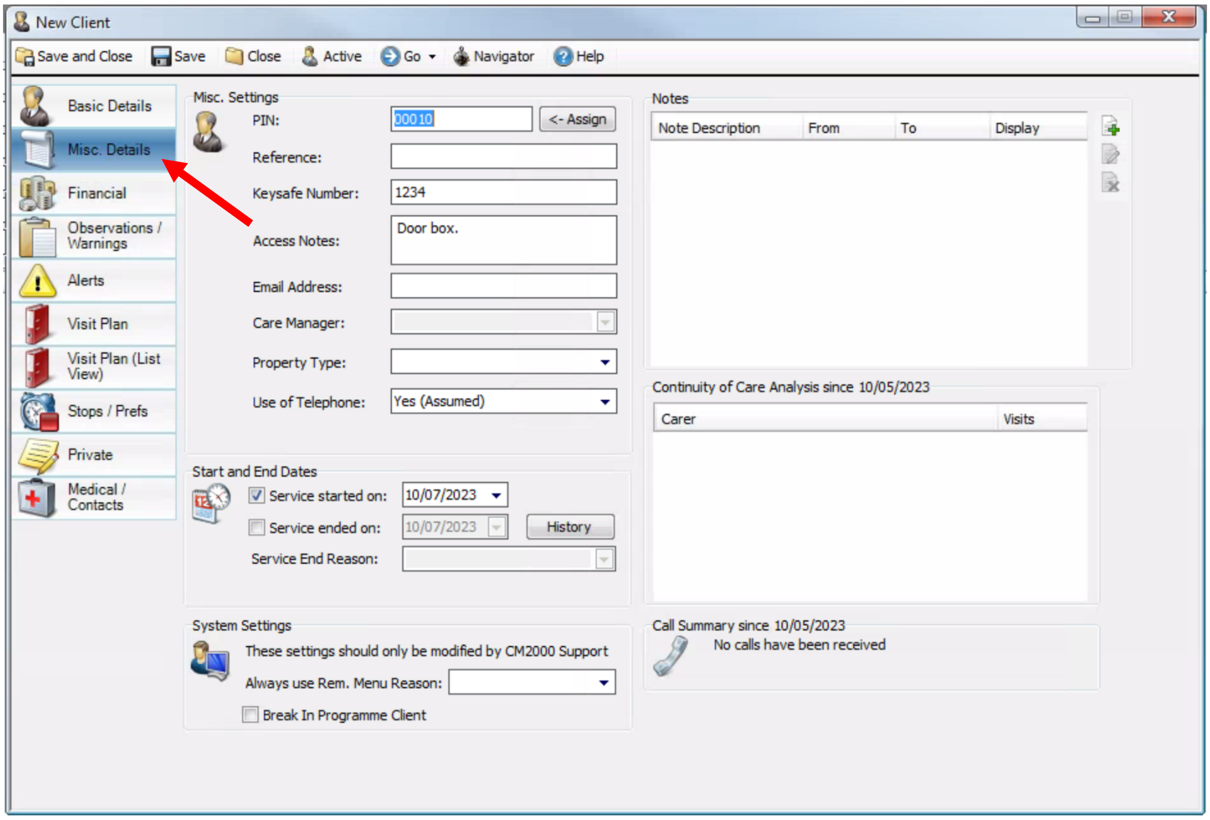


6. When completed, select "**Save**" from the toolbar.

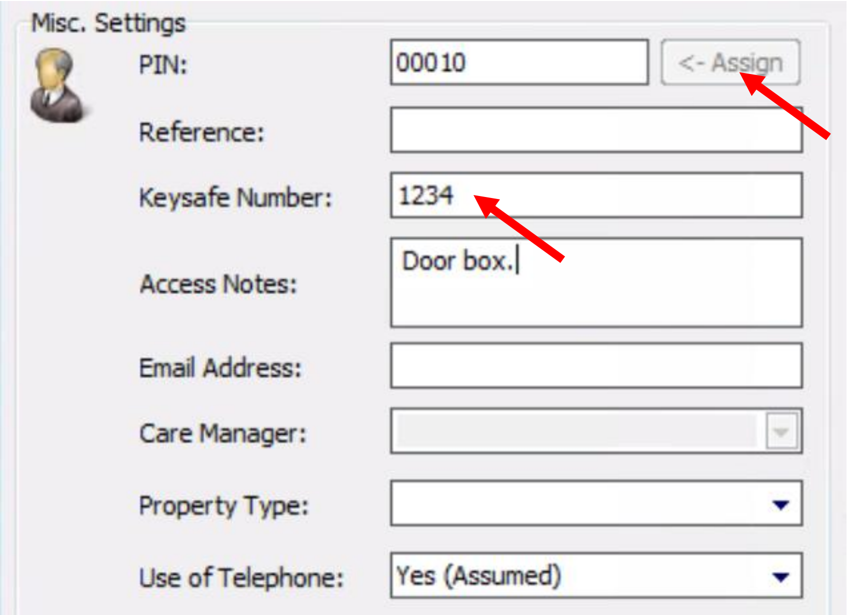


Misc. Details

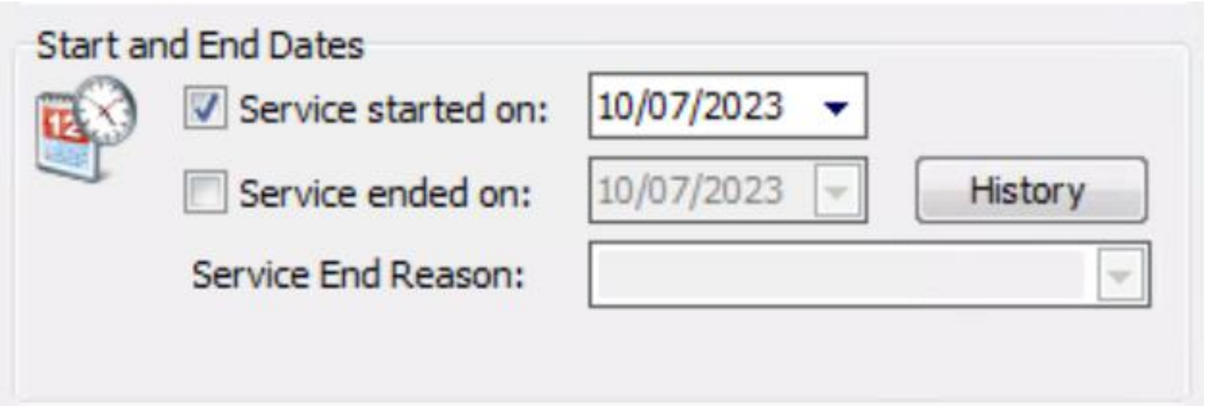
1. After saving, "**Misc. Details**" on the left will now be editable.



2. Misc. Settings section:
    a. Pin: Select "**Assign**" if you experience any issues later, go back to this and select "**Assign**" again and then save. This is for manual logins.
    b. Key safe number: If applicable, enter this in so the carer can enter the premises.
    c. Access notes: Include any notes about the entry of the property.

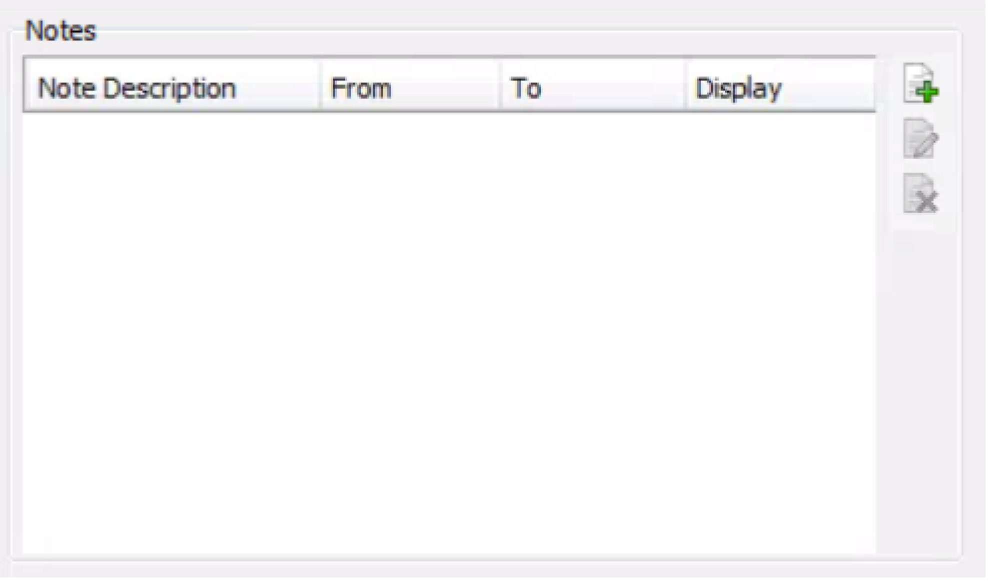


3. Start and End Date section:
    a. **Service started on**: This does not affect the visit plan. This is only for when the client is under your care. This should be set as today's date by default. Just check the box.
    b. **Service ended on**: This will require an end reason but once they are no longer in your care enter the end date.

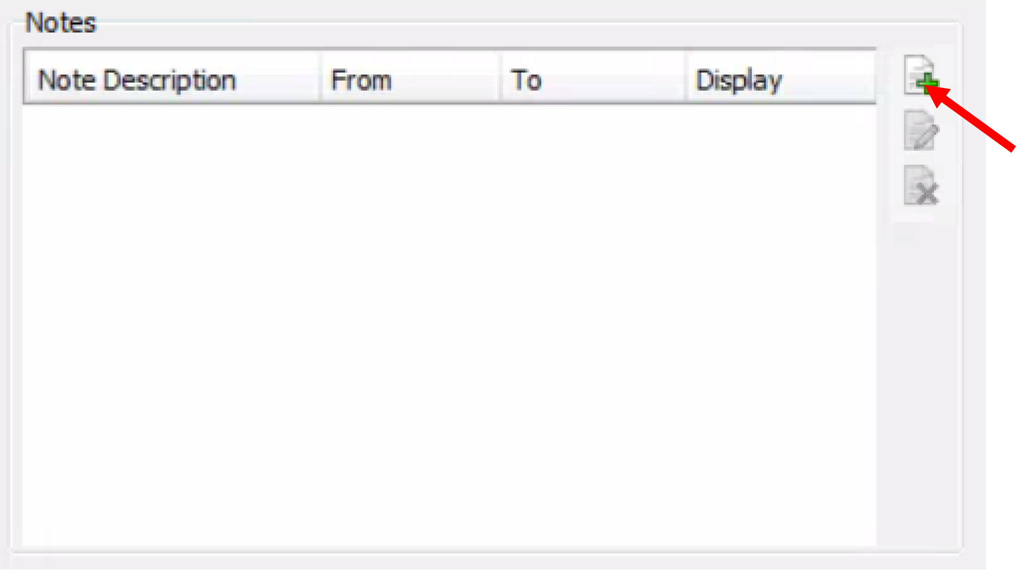


Adding Client Notes

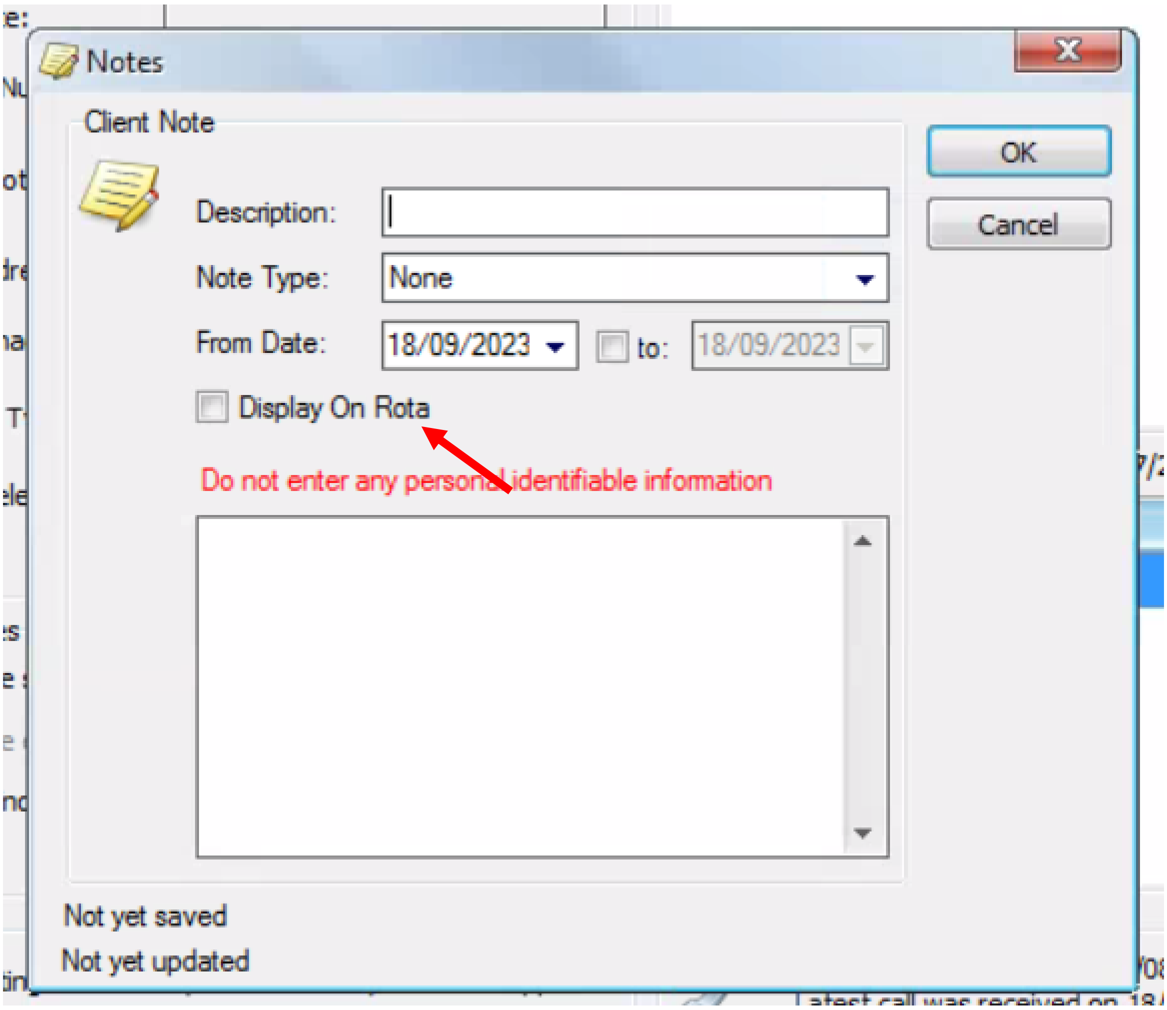
1. Notes could be to inform either the Support Assistant with information or a simple note for other office staff when entering their client record.



2. To add a new client, note, select the little paper with the green plus.



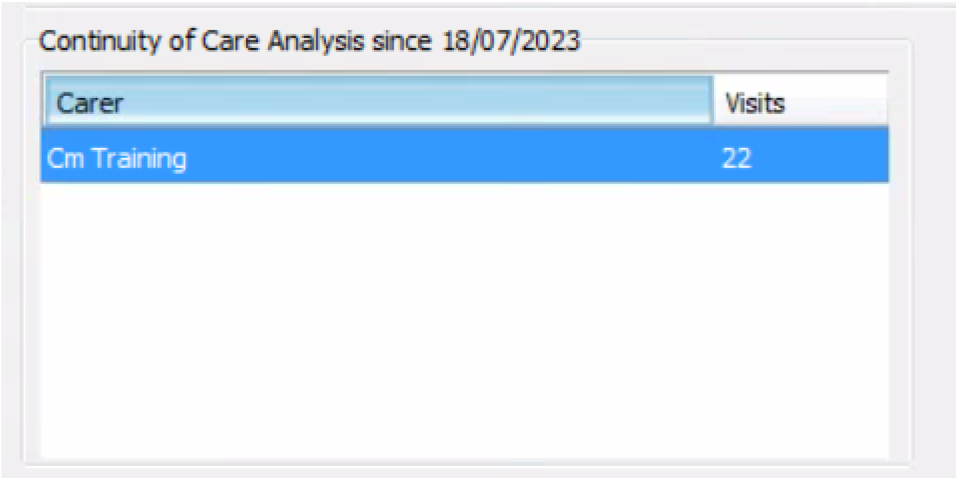
3. A new box will appear asking for the description and note type.
   a. **Description**: Is the title of the note
   b. **Note type**: Is what is it about. Please select the appropriate choice.
   c. **From Date**: If there is a specific time frame to the note, include it.
   d. **Display on Rota**: Is available if you want the Support Assistant to be able to see it on the CM Mobile application. Tick for Support Assistants to see, leave unticked if you only want other office staff to see.
   e. **White Box**: This is where the information is stored.
   f. Press **Ok** when done.
   g. Remember to select "**Save**" on the client record.



Carer continuity

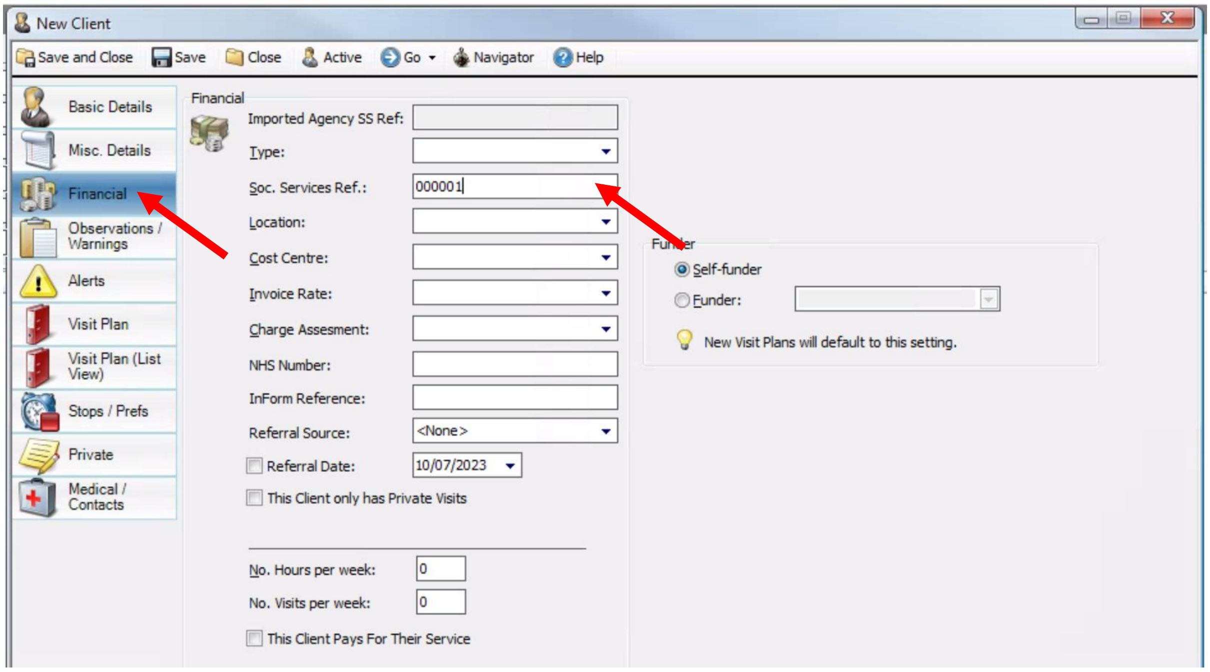
1. Underneath the client notes, you can see how many times certain Support Assistants have been to see that individual.

2. This helps with carer continuity.



Financial

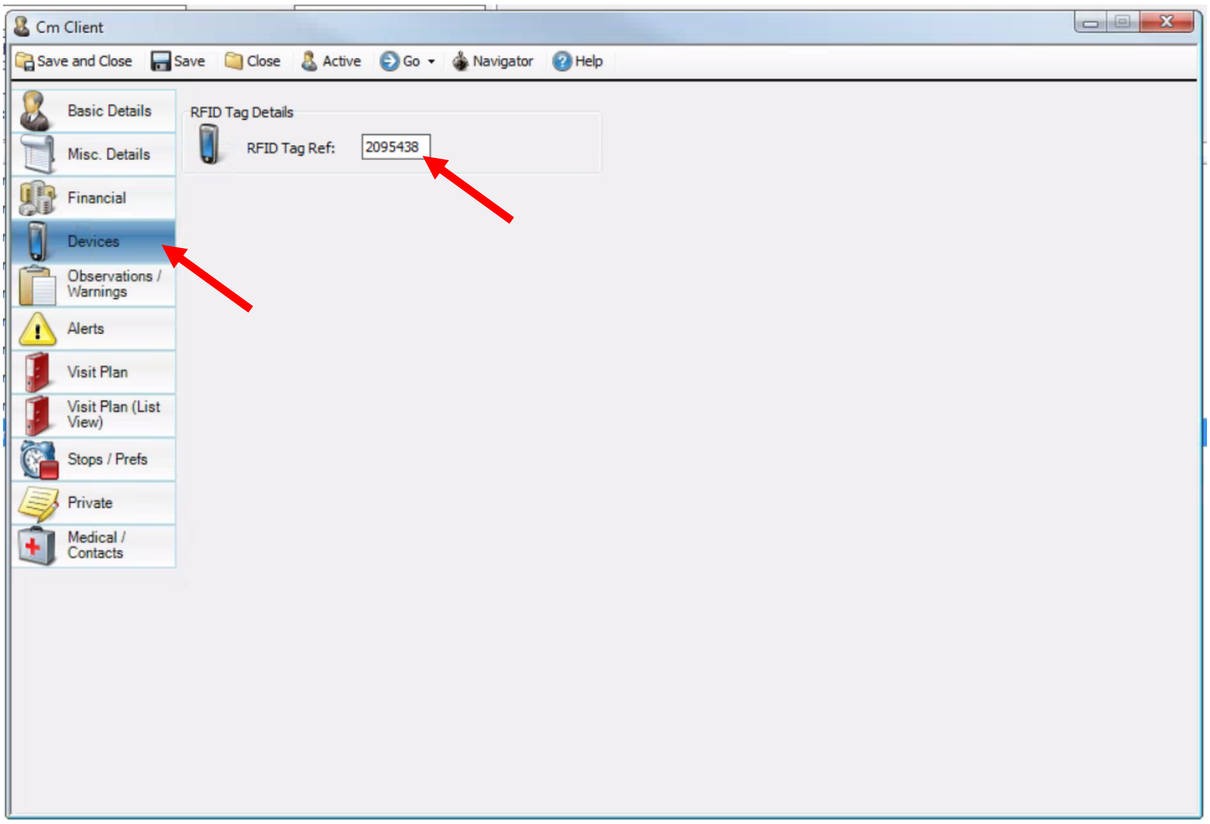
1. Little information required, on the financial section:
    a. Soc. Services. Ref.: This is the Caredirector ID of the client.



Tag Administrators

1. This only applies to those practitioner/ co-ordinators who complete pre-visits and/ or whom have been allocated to be tag administrators.

2. A tag administrator is responsible for allocating a QR code to a client. To allocate a tag go to "**Devices**" on the client record.



3. On a QR code, underneath the box you will see numbers.

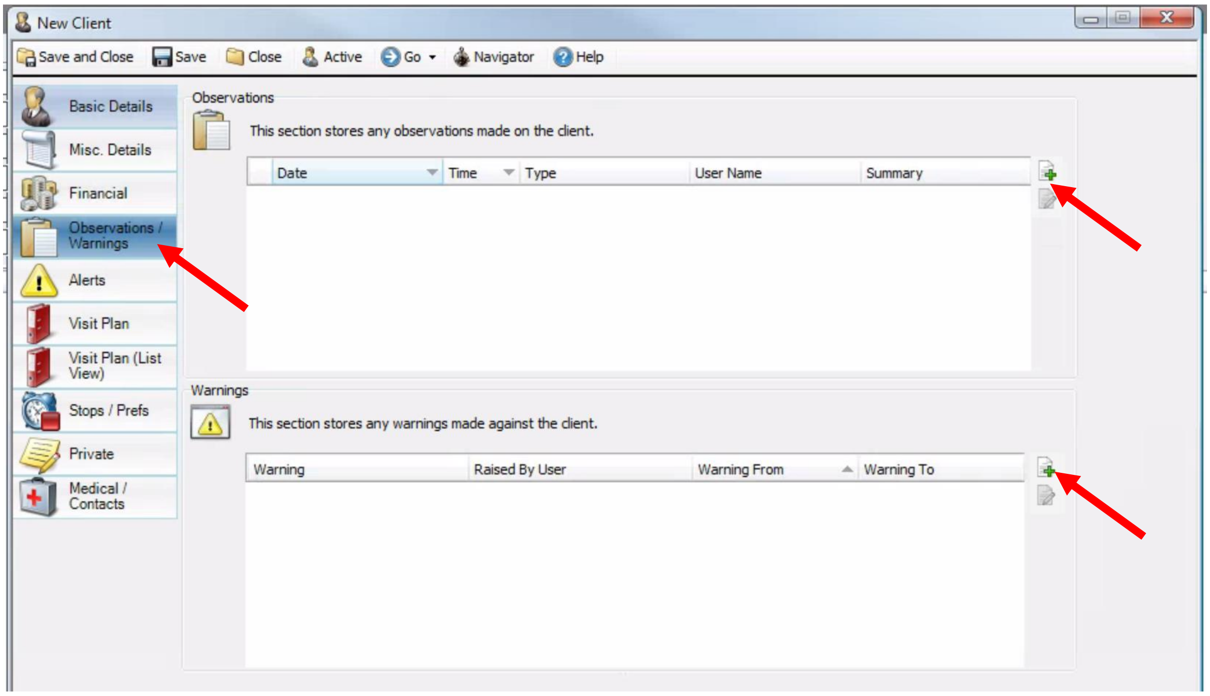
4. Type that numbers into the blank box next to "**RFID Tag Ref**:"

5. Then select "**Save**" on the client record.

6. Whenever a Support Assistant goes to that visit, that is the QR they will use. Please ensure when that client is no longer requiring service. That we go into their client record and remove this number making the box blank again. That way we allocate it to another client.

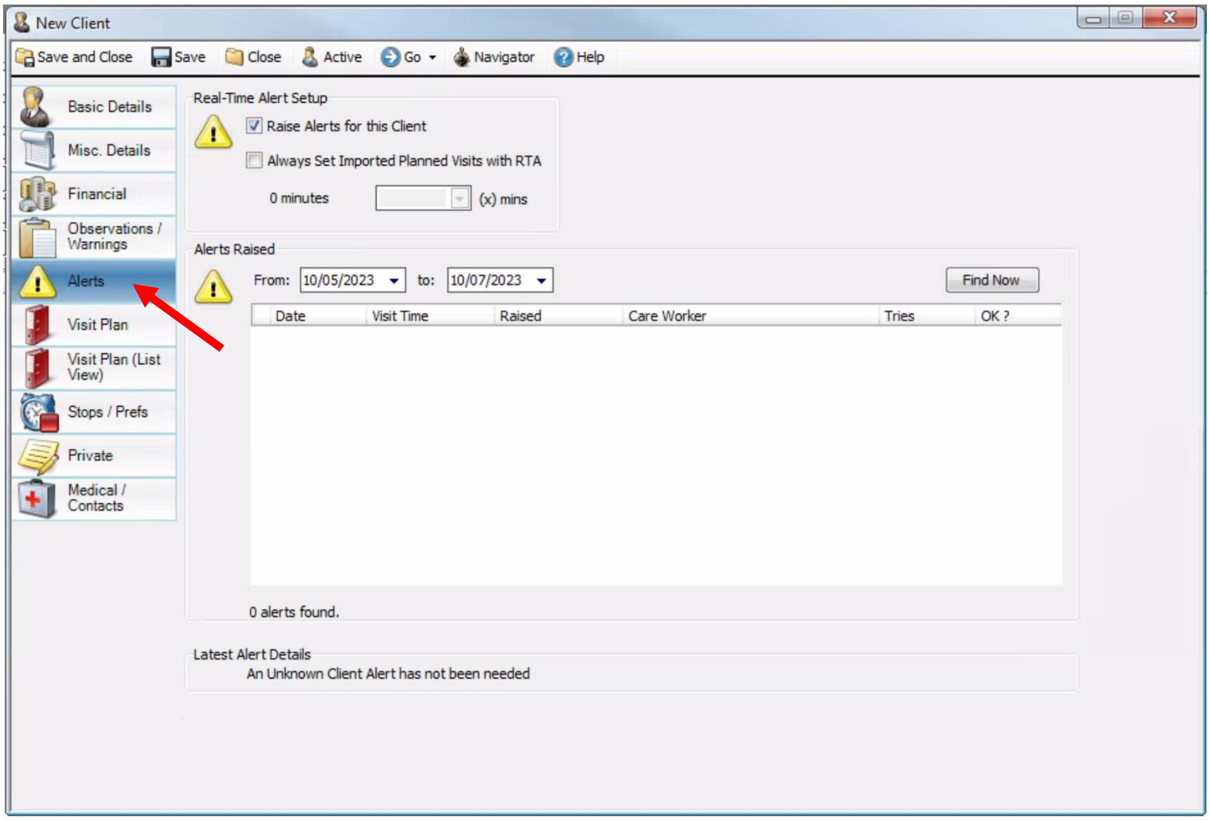
Observations/ Warnings

1. If there are observations or warnings that requires the carers attention, either before, during or after visiting. To add one, select the paper with the green plus on the right-hand side of the box.



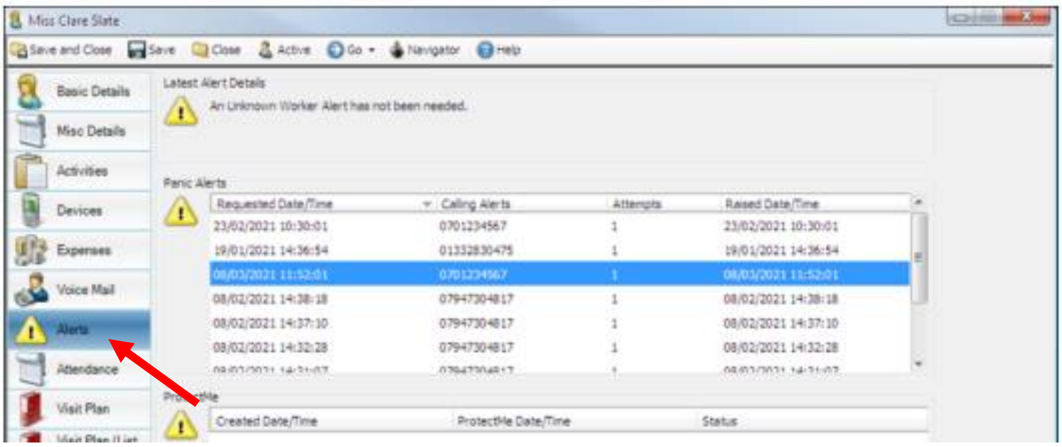
Alerts

1. You can view the history of alerts made on a client.



Panic Alerts

1. Support Assistants can raise a panic alarm on their tablet, this will contact the office. It will also show in the alerts section of the Support Assistant's record. A prerecorded message will be played with the phone is answered. This message will confirm that a panic alert has been raised by CM2000 by the PIN number relating to the Support Assistant. If you need to repeat the message, you can do this by pressing "1" on the phone.

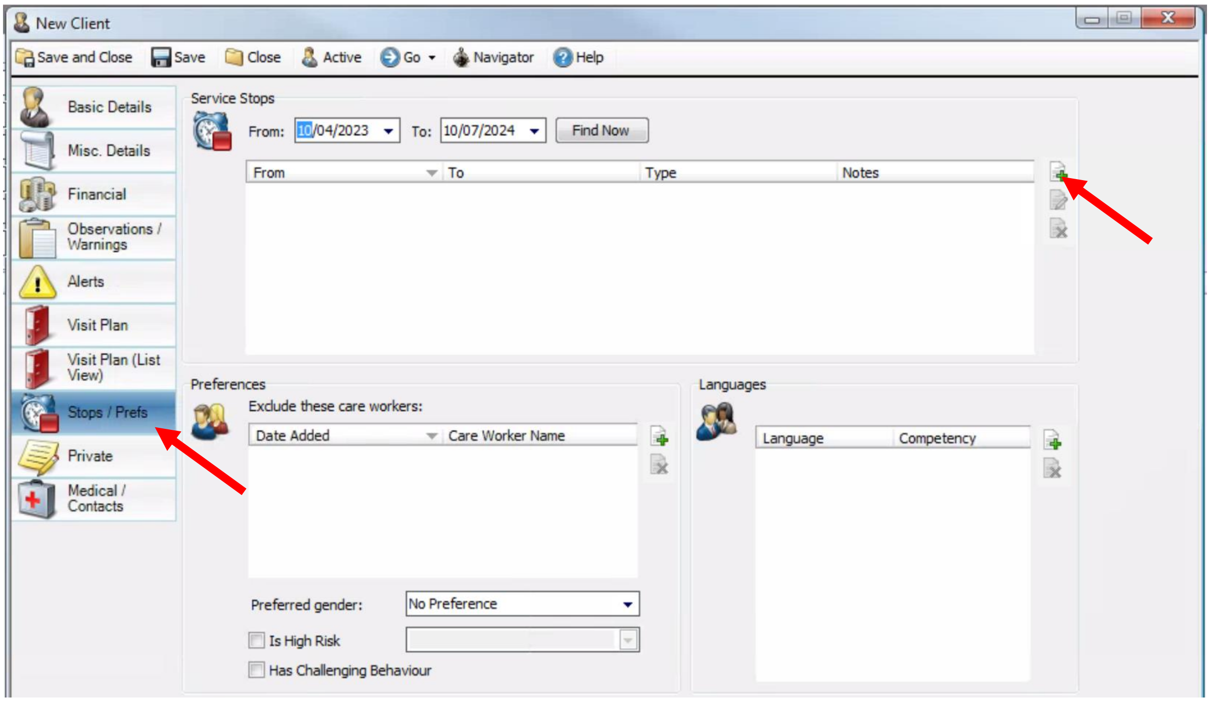


Stops/ Prefs

Service Stops

1. Use this location for any longer-term service stops and service stops for individual visits in the "**daily planner**" section.
   Please note when removing service stops, the carer does not automatically get reassigned. The practitioner/ co-ordinator does this manually.

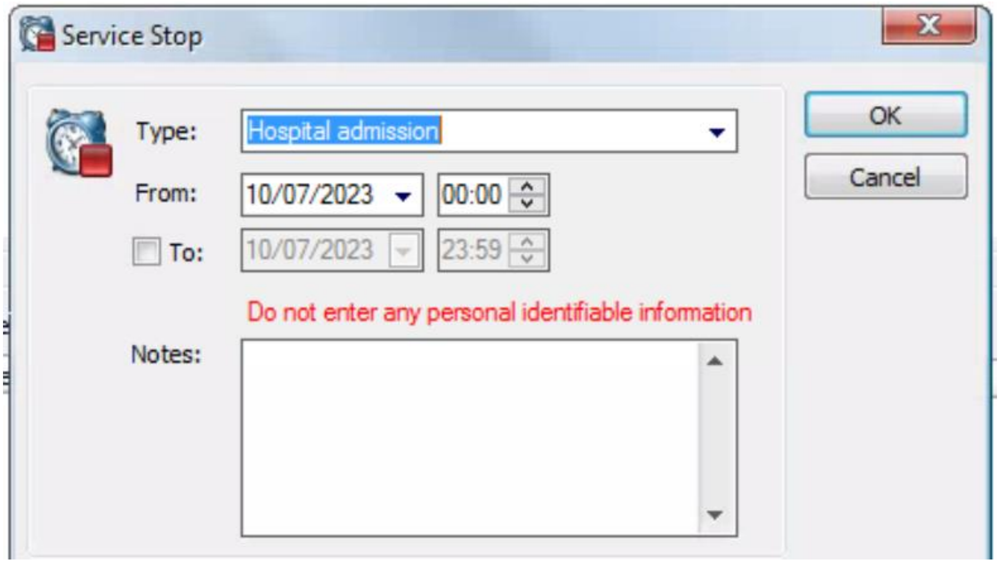
2. To add a service stop, select the paper with the green plus on the right-hand side of the box.



3. This will open another window, when finished select "Ok":
   a. **Type**: Select the relevant option.

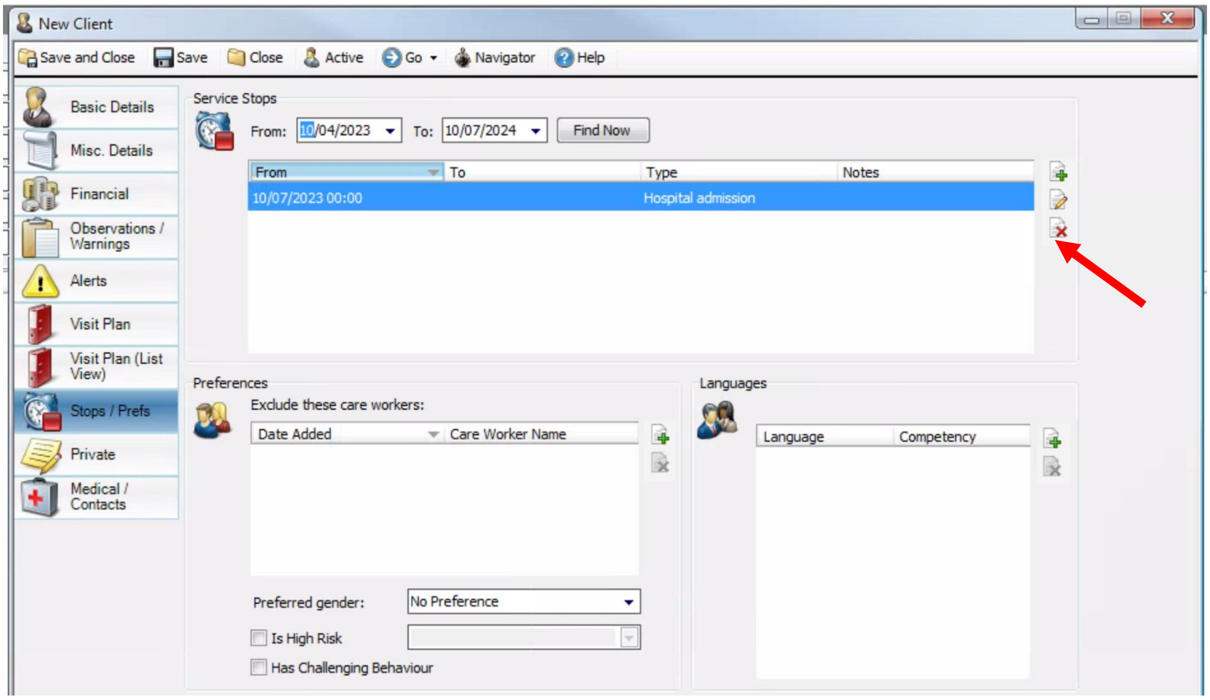
   b. **From**: When they want the service stop to begin. (Time is available).

   c. **To**: If readmission into hospital with no end date, leave unticked as this will stop all services for the near future. Later, you can come back and add a to. If it is a short holiday put in when they will be back.

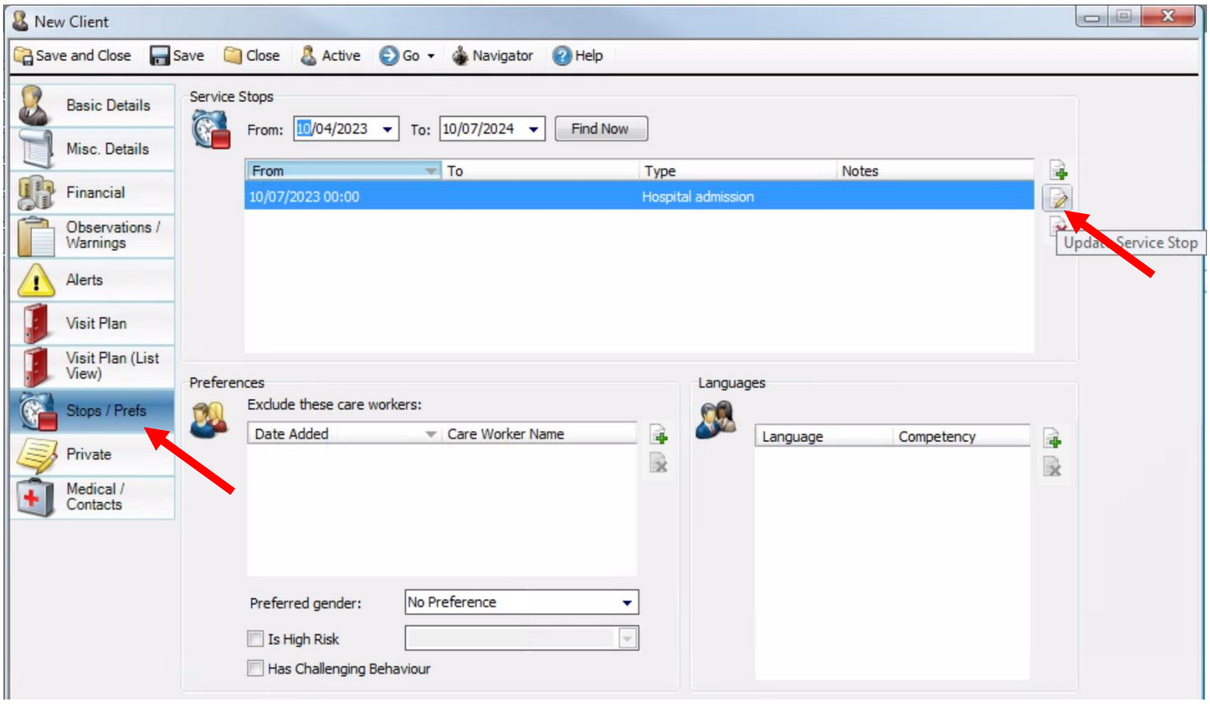


4. This will apply a purple service stop on the "**daily planner**" section and remove all visits during the time selected.

5. To delete a service stop, select the one you want to delete from the list and press the paper with a red X next to it. Do not delete anything other than service stops done for that day i.e., the client now requires the service stop at lunch today and wants to reorganise.



6. To edit a service stop, select the paper with the pencil icon on the right-hand side.

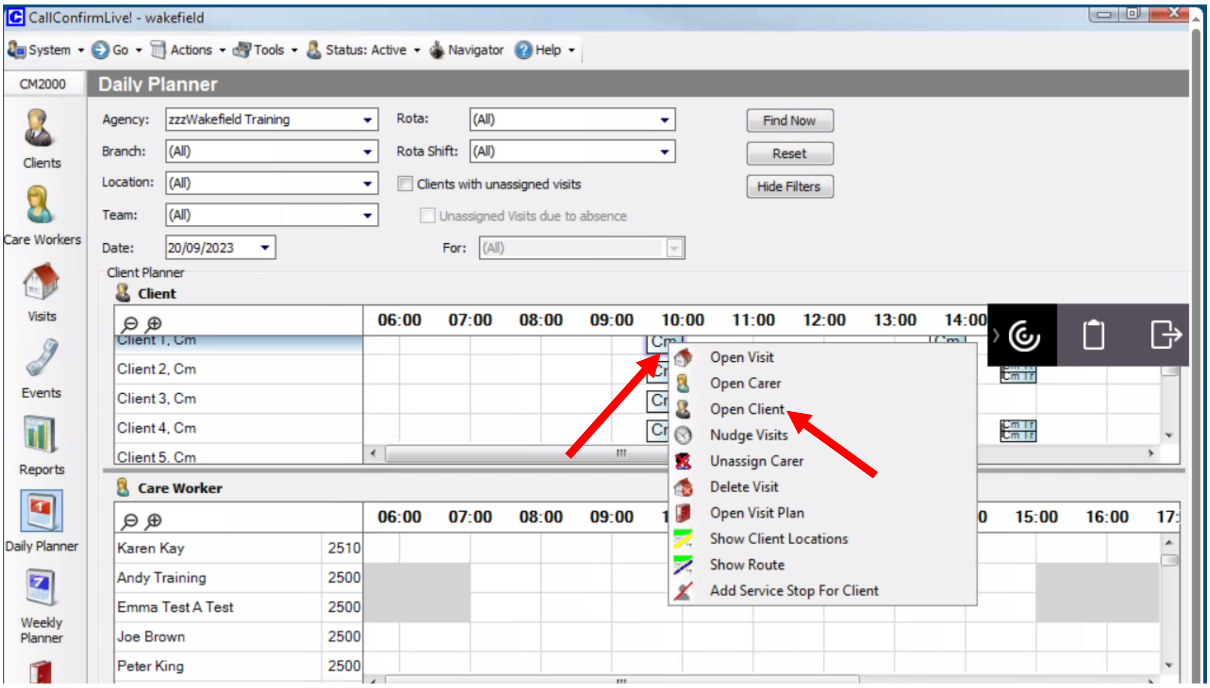


Support Assistant Exclusion

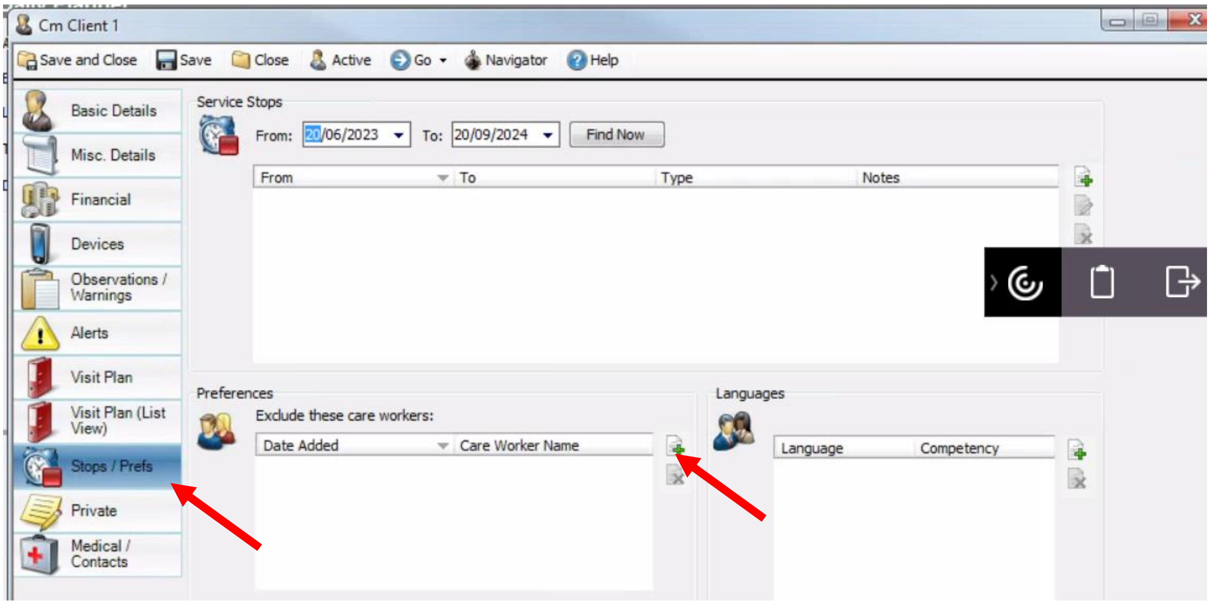
1. Occasionally we need to ensure Support Assistants are not assigned to a client.

2. This could be for a variety of reasons however to ensure they are not assigned and to remove any future planned visits they have recorded we need to add a client exclusion.
   Please note: They still may have a rota scheduled for that client with that Support Assistant in question. Please raise this to the planners/ schedulers to ensure this is changed.

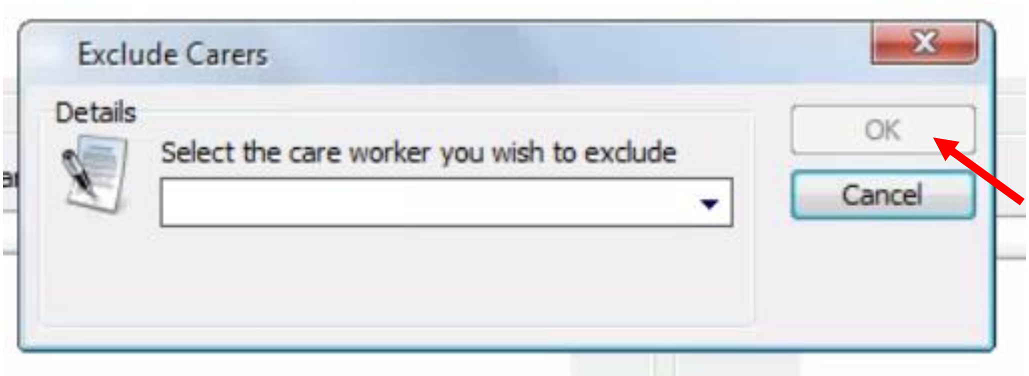
3. A wide range of ways to find a client record however, if it is from the daily planner screen. Right-click on the visit and open client record. Or find the client in the client section.



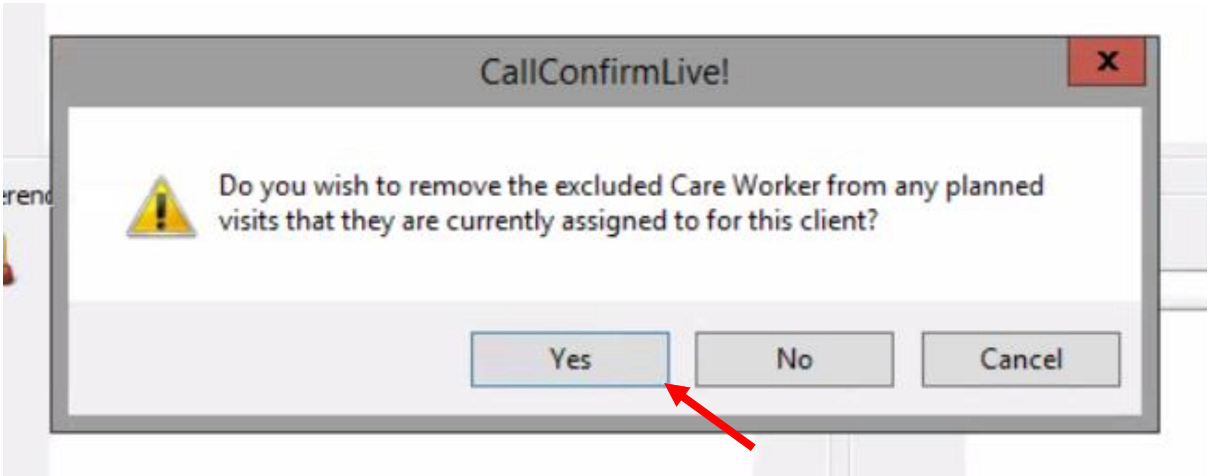
4. When the client record is open, go to “**Stops/ Prefs**” and select the green plus with the paper next to the Preferences section.



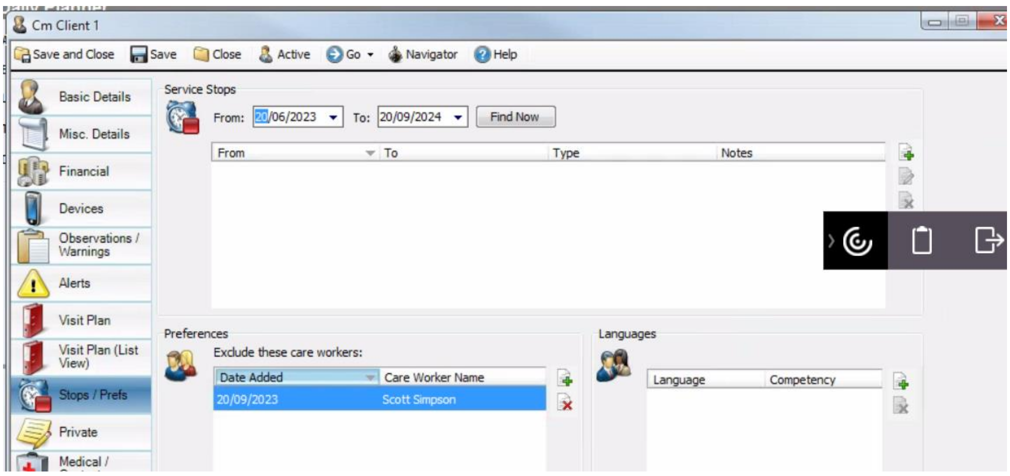
5. A new window will open, asking which carer needs to be excluded. When found press “**Ok**”.



6. When “**Ok**” has been selected, a new window will appear. Select “**Yes**”.



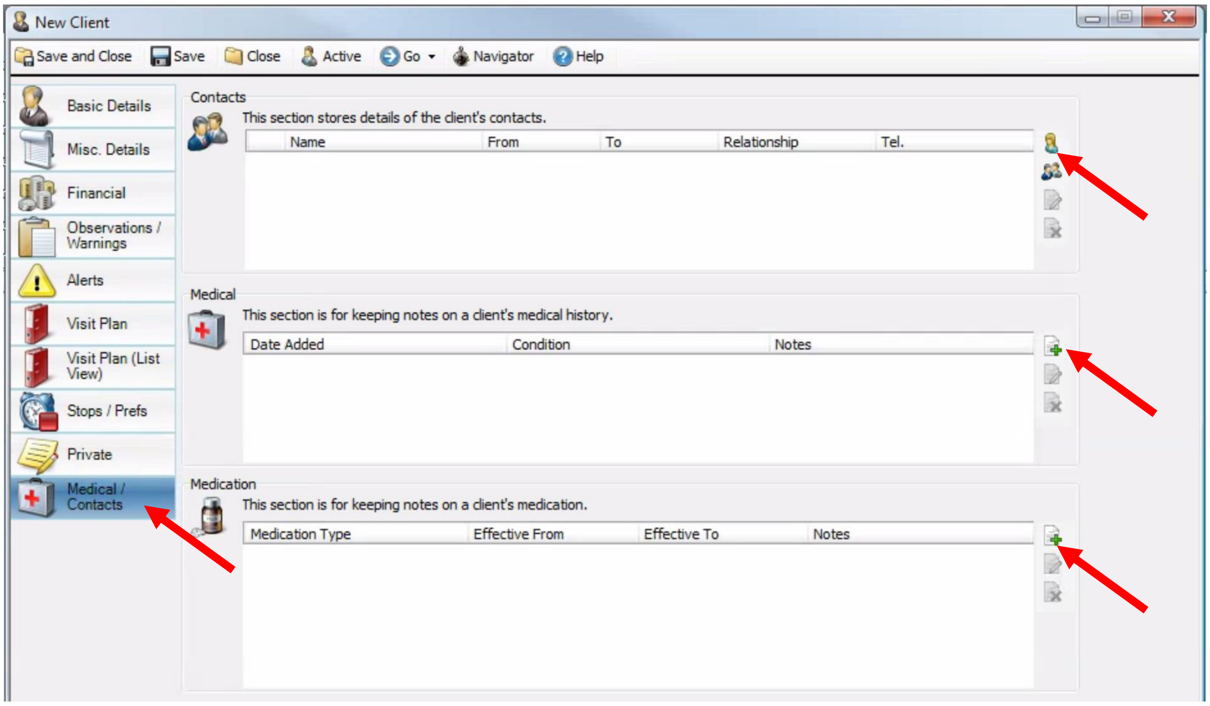
7. This carer will now no longer be an option to attach to any future visits required for that client. They will also be removed from any existing visits they have been allocated to. Select “**Save**” when finished.



Medical/ Contacts

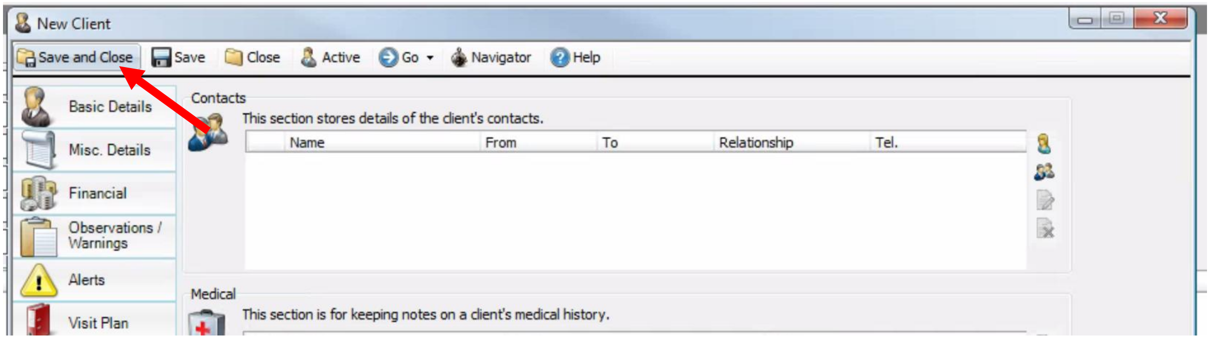
1. This is the section to include any point of contacts, any medical requirements from carers and any medication required.
   Please note: Medication, please use the existing form to complete this. Medication implementation will be at a future date.

2. Remember to use the paper with the green plus or the person icon to add new.



Saving

1. Please remember to save throughout via the "**Save**" button on the toolbar. When happy please select "**Save and Close**."

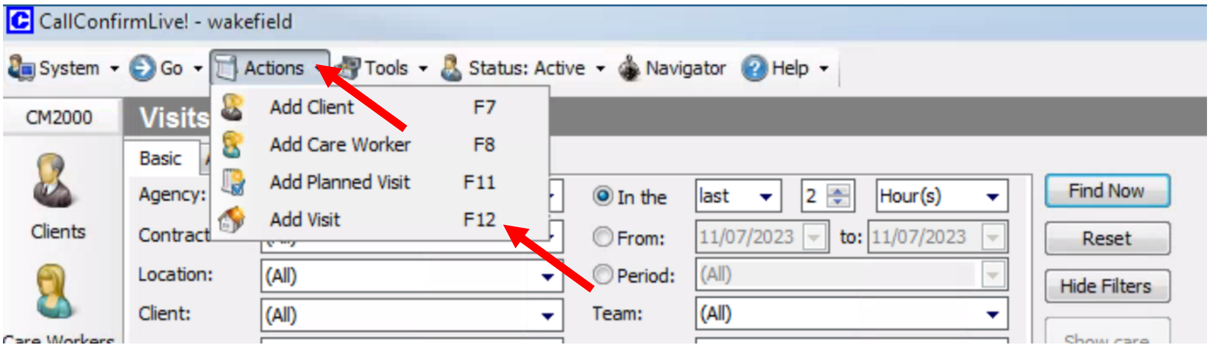


Setting up a one-off visit

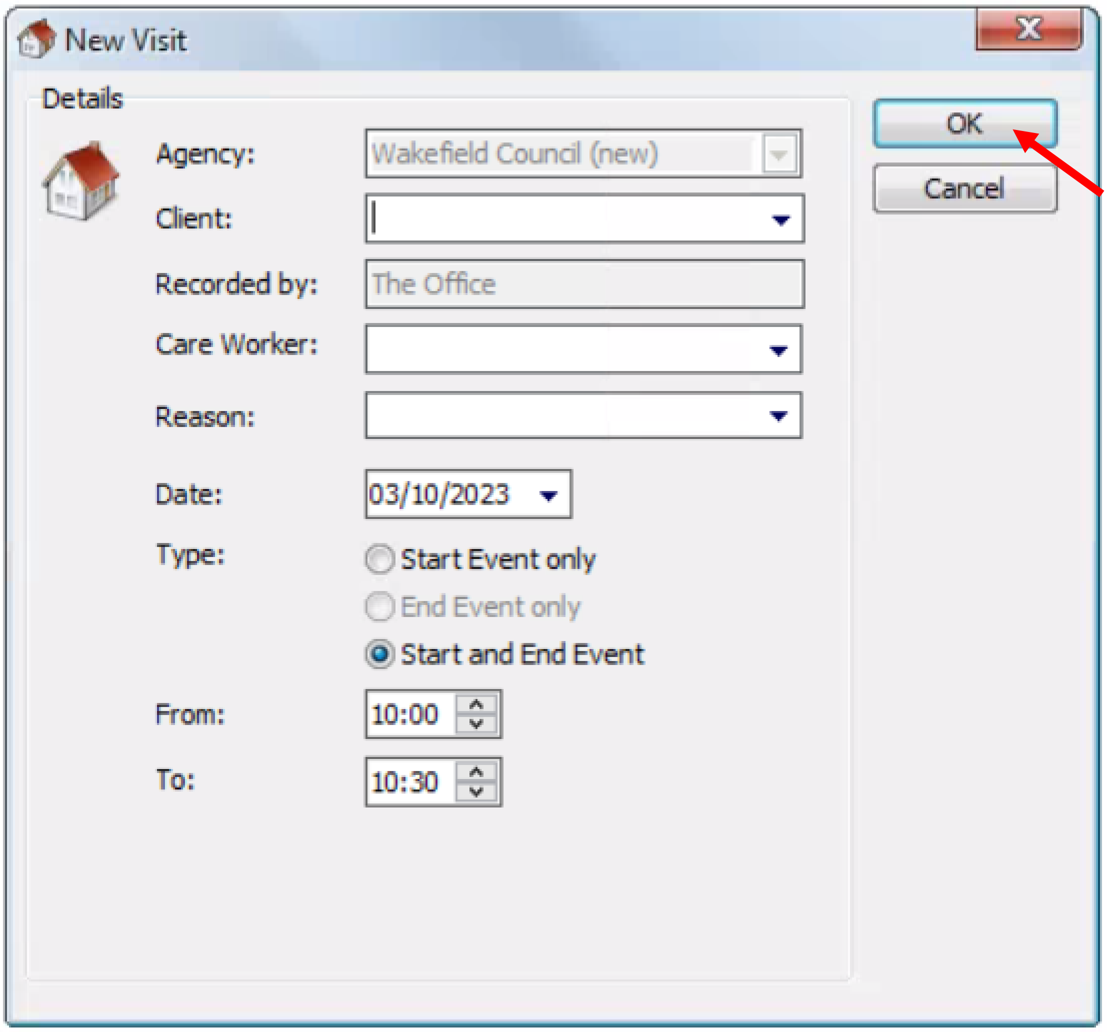
1. There are two ways to organise a visit:
    a. **Visit plan**: this is located on the client person under “Visit Plan” and is set up by the schedulers. A visit plan attached to a rota, is what automatically assigns carers to the runs.

    b. **Add visit**: this is in the action sub menu, and this is the way you will be organising those one-off visits before the scheduler can organise their visit plan (care plan). This is useful for setting up a pre-visit or a one-off visit that day.
    Please note: This is known as an unplanned visit. Sometimes Support Assistants run into complications where their unplanned visit matches to an existing visit with tasks. We need to remove that and set up an unplanned visit to the correct time they arrived. Please follow the following steps if this occurs so you can apply the correct time in and out and include a small description in the planned visit note section of why and assign it to them. The Support Assistant can go in and add a visit log to provide further details.

2. The way to add a one-off visit is to select “**actions**” and then go to “**add visit**” or press **F12**.



3. When selected, it will open a new window – select the "**Client**", who the Support Assistant will be (if you are doubling up please do two separate ones for the same time, or adding a double up to an existing planned visit just add a new visit with the other carer at the same time), what the reason is for the visit, date, and the time from and to. When completed, select "**Ok**"?



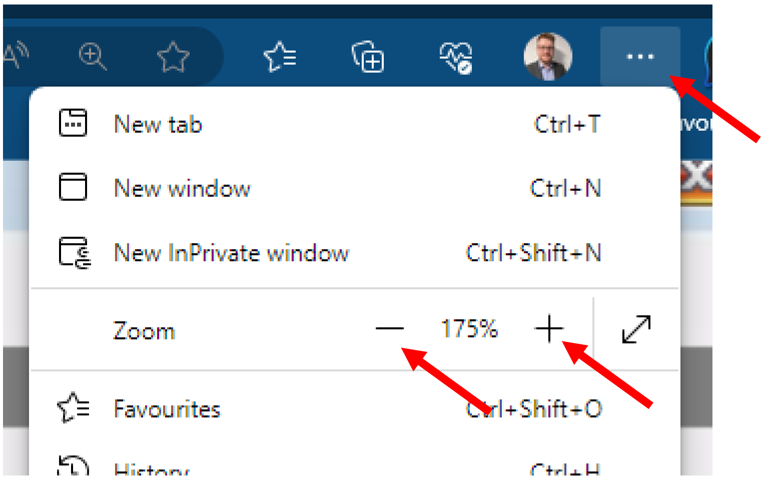
4. This is also used for when a carer has scanned incorrectly and requires a visit entered in for a buzz call type situation.

Daily Planner – Offloading and Shuffling

1. "**Daily planner**" is a great tool to check for capacity, assign carers to runs, log absences, service stops, training days for carers and to easily check to see who has and has not got a scheduled visit planned.

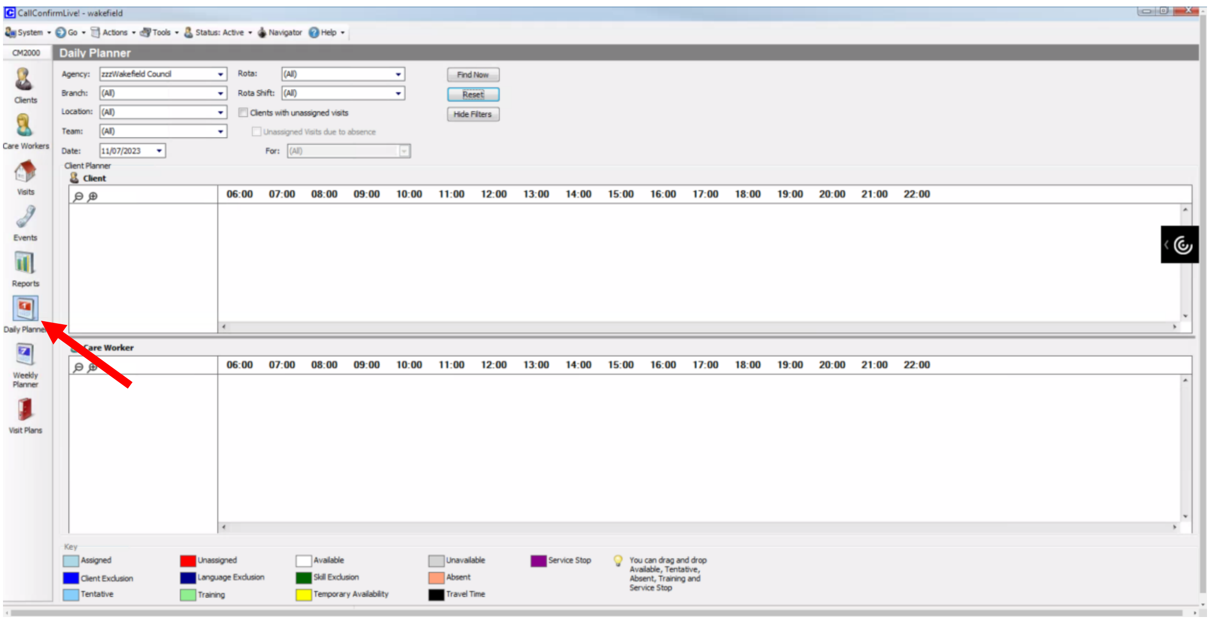
Zooming in and out

1. Select "**Daily Planner**" from the left-hand side. This can be tricky to see on a laptop as the information is within two boxes. If you have any difficulty with the view, please use the zoom in and zoom out functionality. Select Microsoft Edge's three dots and select zoom in or out.

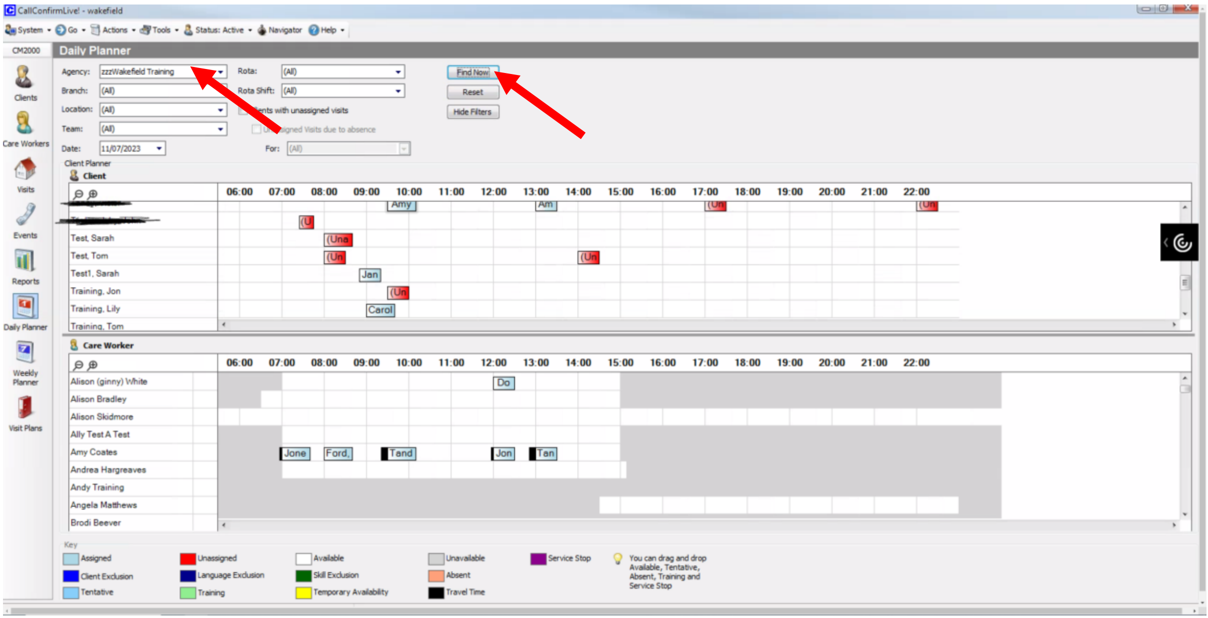


Daily planner - Filters

1. After you have selected the "**daily planner**" this screen will appear.

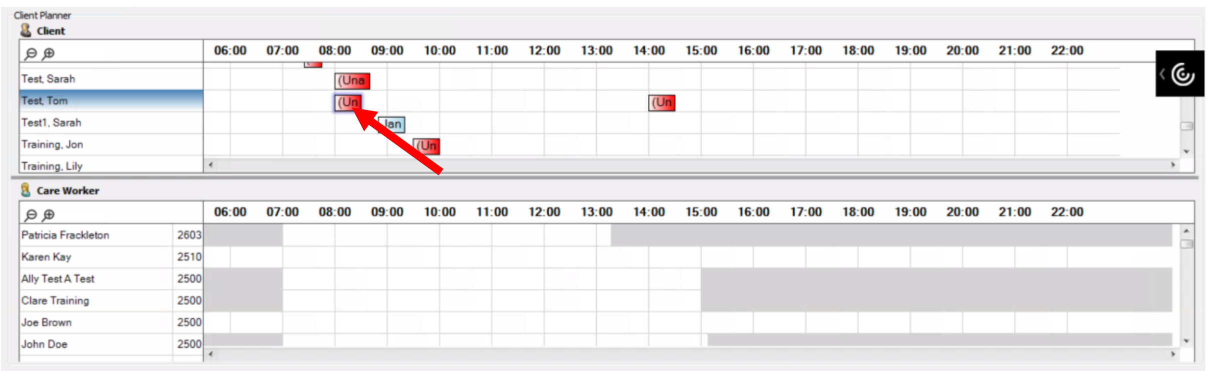


2. The screen will be blank due to the parameters not being set. Use the filters at the top left, to break down the results to branch, location and team as all individual clients are under a sector. This part is situational, so please set this up according to your visit needs and select "**Find Now**." Once you have, you will see a screen filled with blue and red boxes.

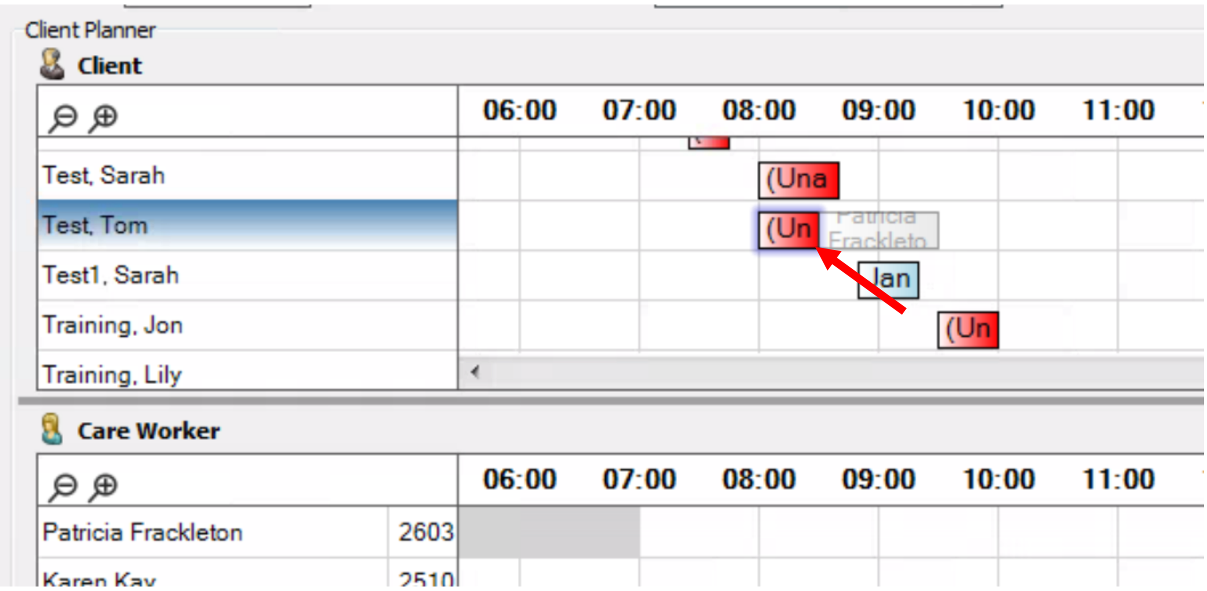


Assigning a carer to a run

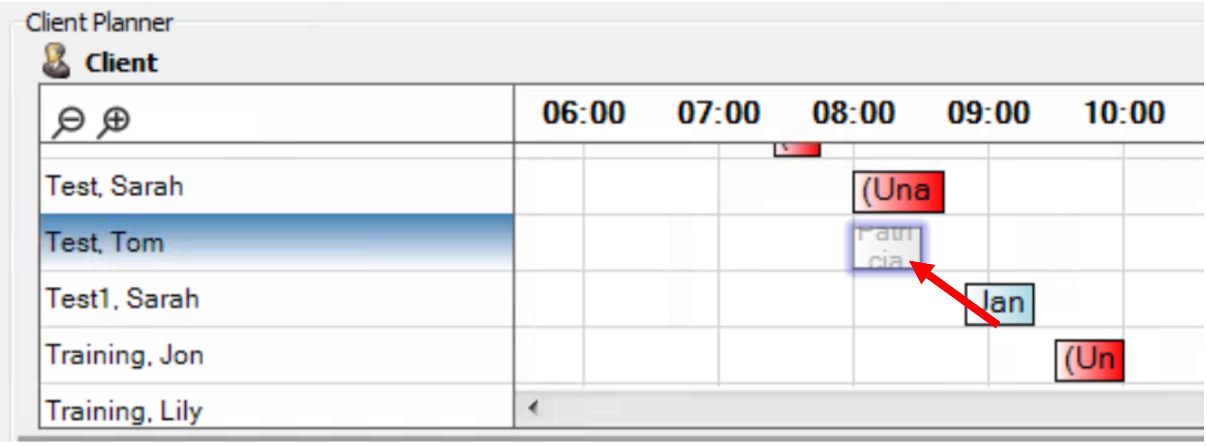
1. Personal information redacted. The top box is the client box to show all visits for the day selected and the bottom box is showing all carers under the filters selected. Anything with a blue box means that visit has a carer assigned, this is either done manually or automatically by the system. Anything in red, requires a Support Assistant. To do this, the process you must follow on every red box is to select the red in question. This will change the bottom Support Assistant box to show the best suitability for the visit from best (top) to worst (low). In this cause Patricia is the best carer suited for Tom Test. The score next to the Support Assistant name means, the higher the better.



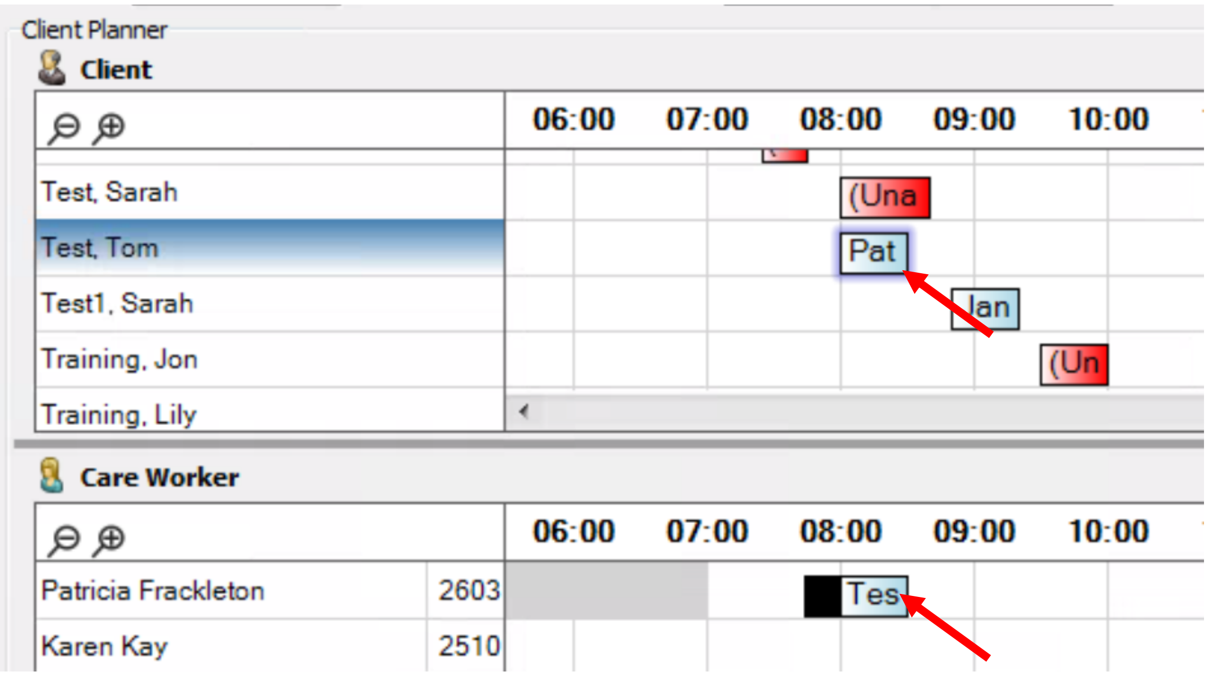
2. When selected, the red box, you must choose from the list below to assign a carer to that visit. To do this, simply click and hold over the name of the Support Assistant on the list on the left-hand side of the bottom box. Once you have clicked and held, drag the name over to the red box in question. You want the transparent box to “**snap**” onto the red box.
   a. Unsnapped: meaning there will be an issue with time.



   b. Snapped: meaning there will be no issues with the times.

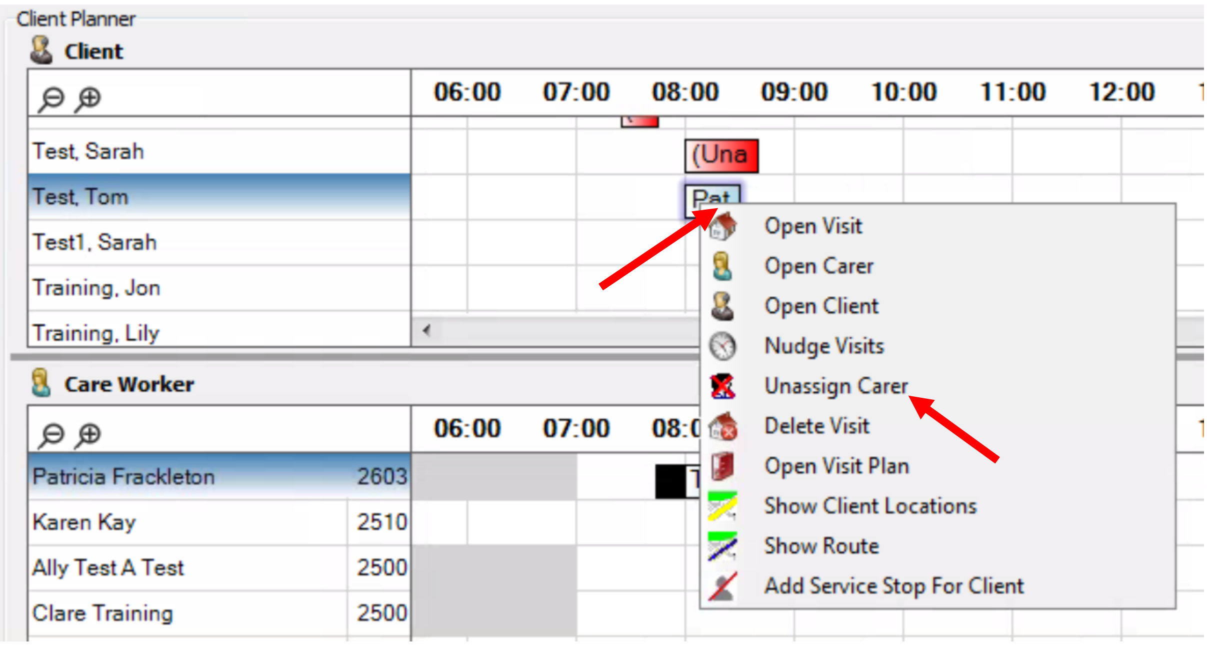


3. When snapped, the timing will be directly over the visit, let go of your left click and the box will turn blue, and the Support Assistant box underneath will now have the visit scheduled into the carer's day. The black box behind the blue box is showing the travel time between the two locations, either from the Support Assistants base to the client or the client-to-client locations.



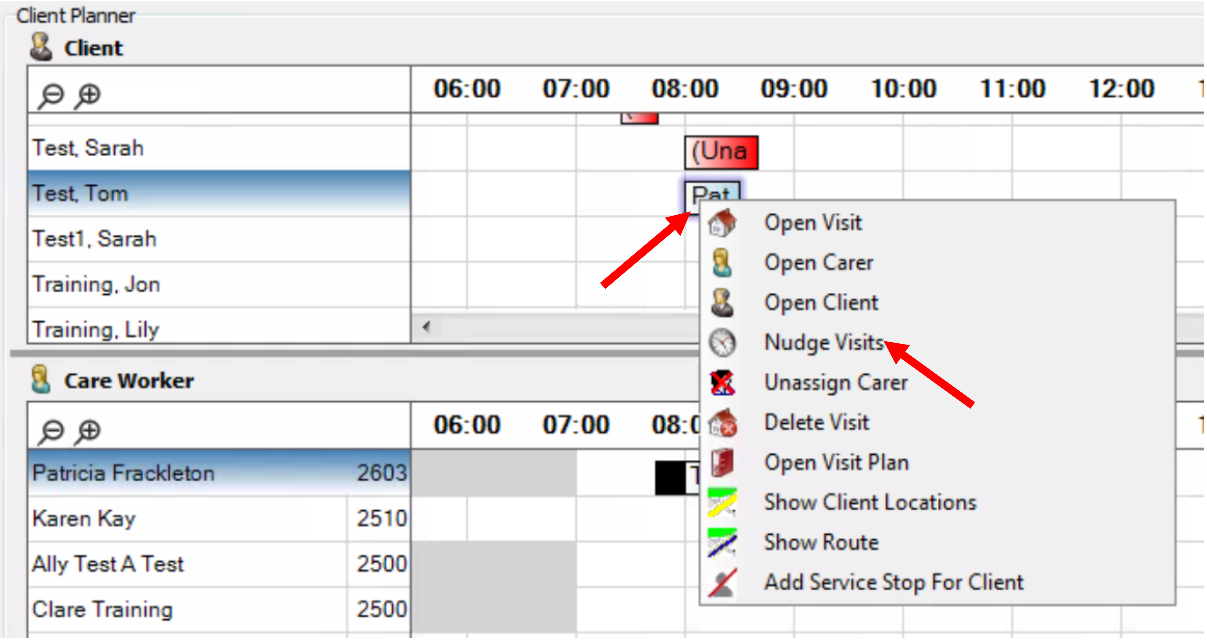
Unassigning a carer from a run

1. If you placed a carer to a run by accident, you can unassign it. Simply, right click the blue box on the client top box and go to "**unassign carer**".

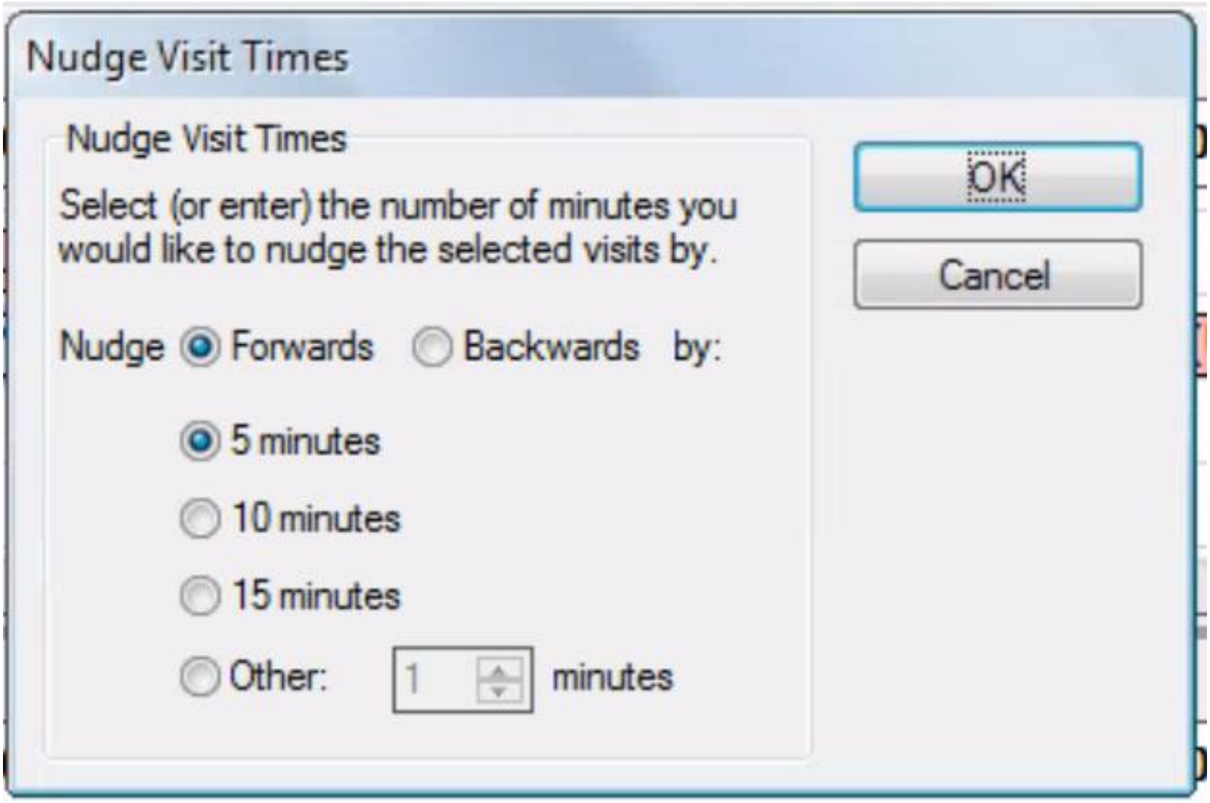


Nudging visits

1. There may be situations that require a time "**nudge**" to a visit either later or earlier. Simply, right click the blue box on the client top box and go to "**nudge visits**."

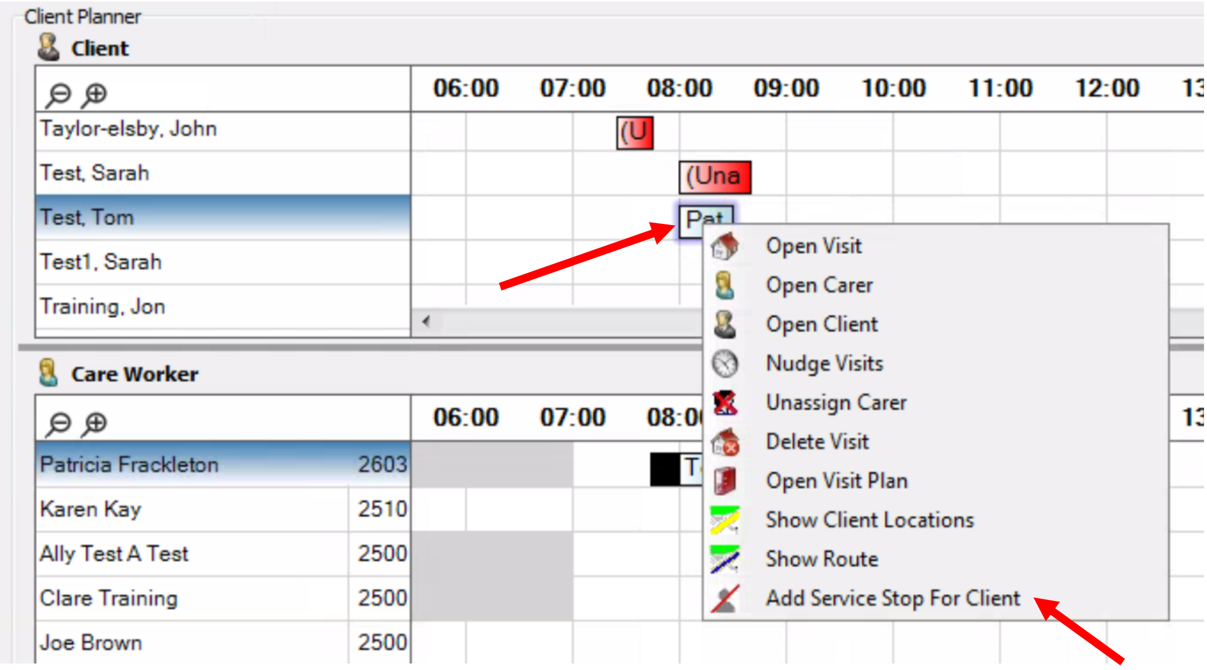


2. A new window will appear asking you about the visit nudge, select your timings, and select "**ok**."

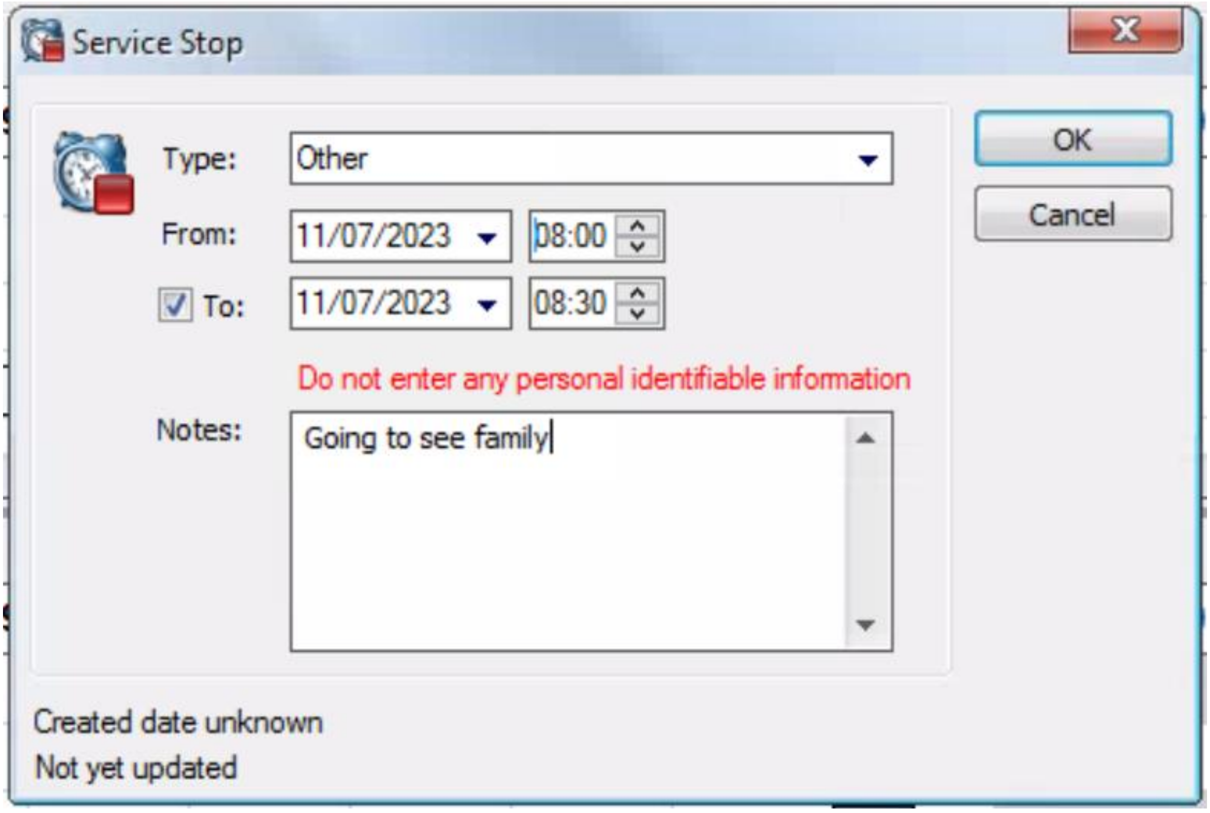


Daily planner – service stops

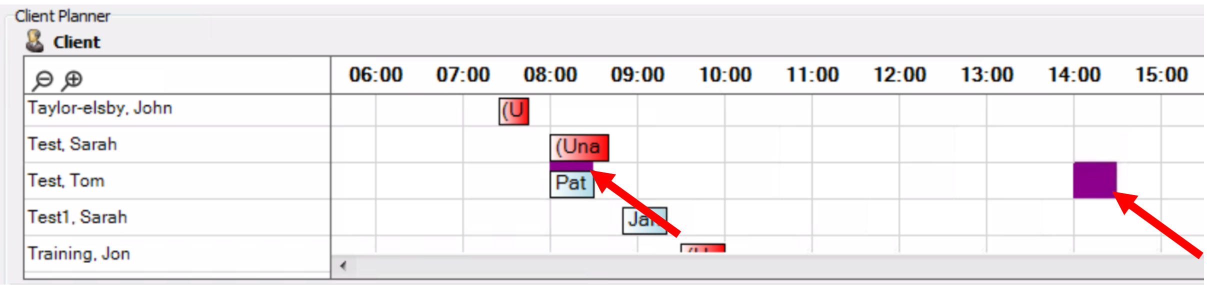
1. Situations may occur where the client requires a service stop on their visits. This is down to assorted reasons, however, let us say in this example, the person is wanting their morning and lunch visit stopped for the day as they are seeing family. Rather than adding a service stop for the entire day, we will want to add two separate service stops one for each time. This will mean if they decide to reorganise their lunch visit later, we will not have to cancel the entire service stop and reinput the lunch cancellation. To do this, simply right click on the blue box on the client top box and go down to “add service stop for client.” Make note of the time before you press this as it will not automatically enter these details in. To do this, hover over the blue box for a second to show the times before right clicking.



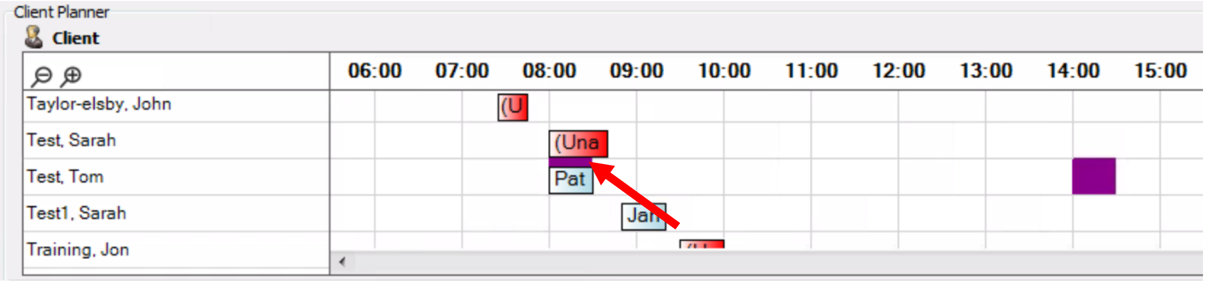
2. A new window will appear asking you for the date, time, and reason for the stop. Enter appropriately, remembering to add the time exactly to the visit. Then press "ok."



3. Once you have added in the appropriate service stops, you will see purple boxes over the services before and any carer that was assigned to visit them has now been automatically unassigned and available for new calls. Please note when ending a service stop, the original carer will not automatically be reassigned, this will need to be done manually or a new carer will be required.



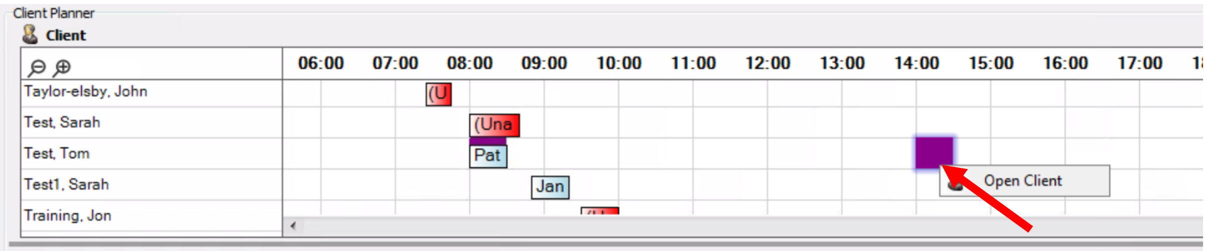
4. I have added this in for training purposes if you ever get this issue, where the service stops or absence or anything has not covered the visit and it is still showing the assigned carer or red box. It is because that time has passed. It is currently 10:16am and the call today was at 08:00 so the service stop has not cancelled out the morning. However, when you do this, you will more than likely not run into this issue.



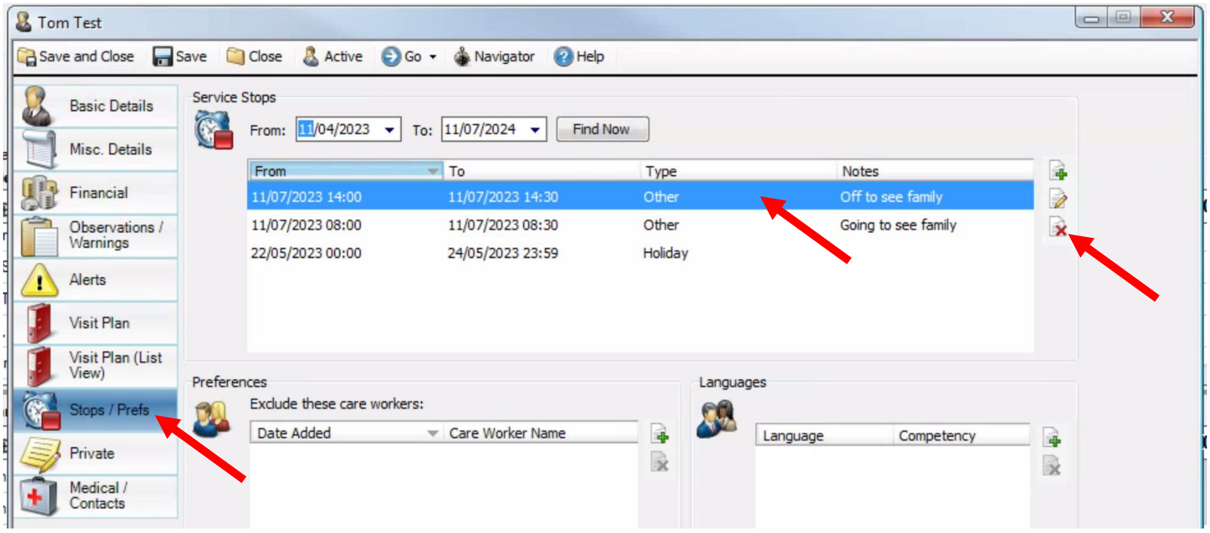
Cancelling service stops

1. Following the previous example, when assigning service stops for individual visits rather than holiday or hospital visits, we add them to our daily planner separately for each visit. That way if the visit needs to be reorganised, it is a straightforward process of deleting the service stop for that event rather than the entire day and reassigning all service stops to prior ones.

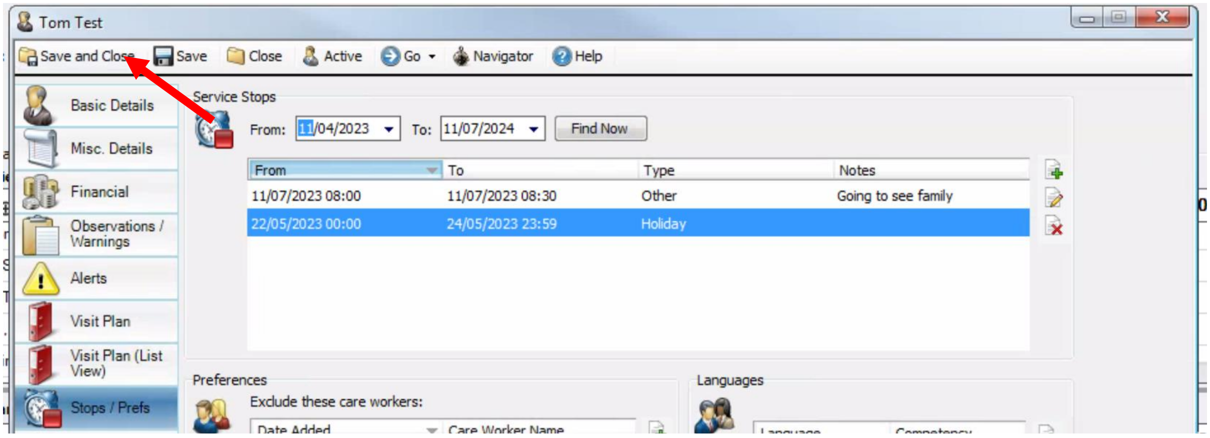
2. With our example, we stopped the morning and lunch visit. However, Tom Test now wants their lunch visit again. To delete this service stop, right click the purple box and select “open client.”



3. This will open their client record, go to the “stops/ prefs” on the left-hand side. Select the time and date you want to delete, it will highlight blue, and then go to the right-hand side of the service stops box and press the paper with the red x to delete it.

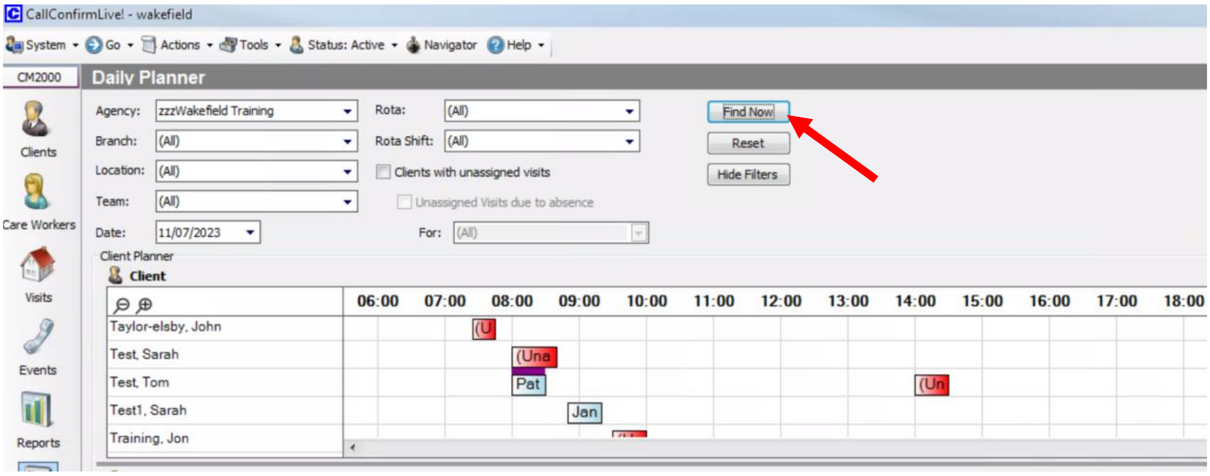


4. This will remove it from the list, now select “Save and Close.”

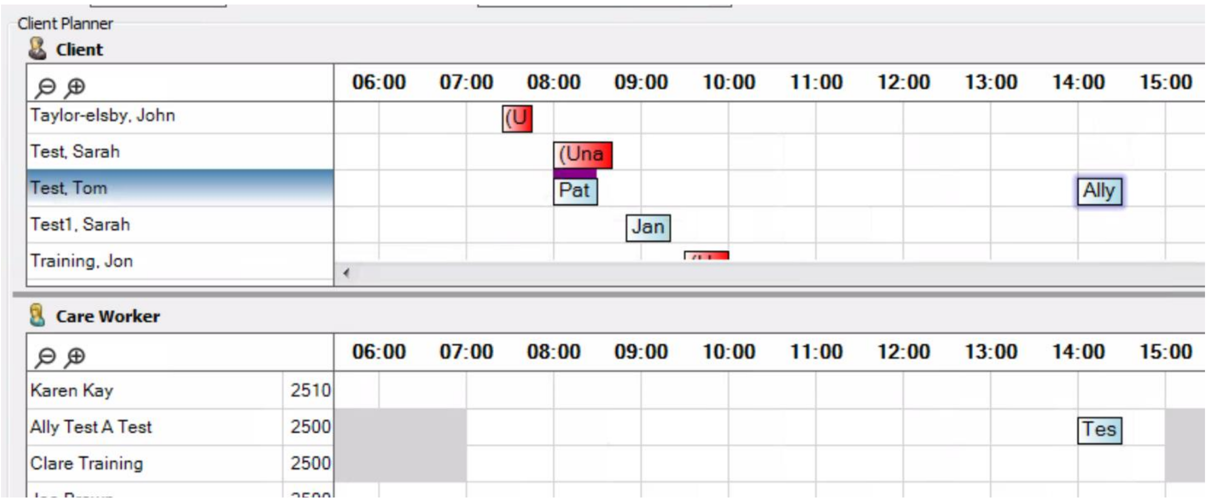


5. We may need to refresh the “daily planner” screen. If that is the case, do not change any filters or settings and select “find now” this will keep everything and will not “jump” your screen, so you do not have to find your client again.

k



6. From here, just reassign a carer by selecting the red box, find the most suitable, click and hold their name and drag over to the red box.



Extra Care – Travel Time

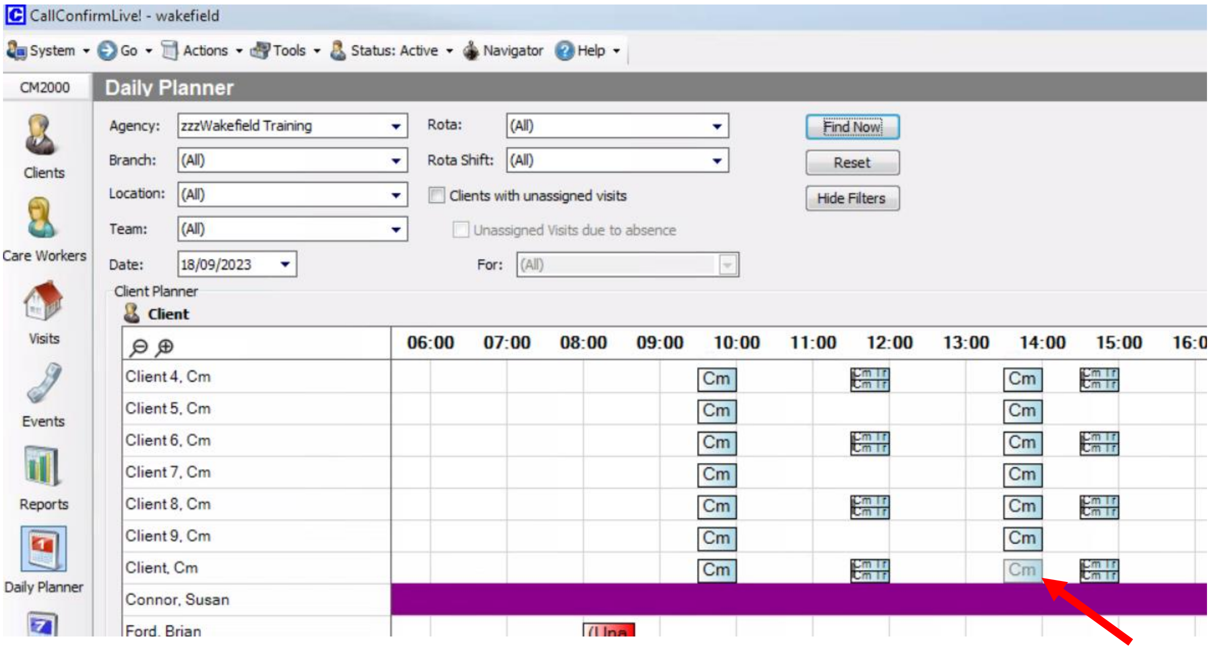
1. Travel time for extra care is turned off.

2. If carers from community/ reablement are assigned to extra care visits on occasions, travel time will not be applicable.

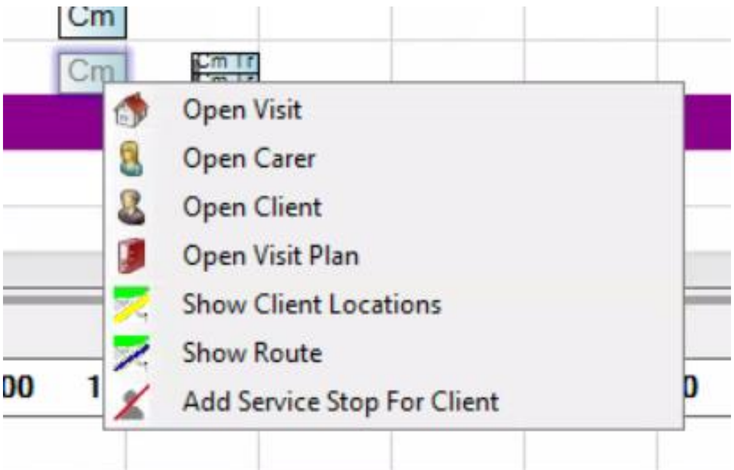
Daily Planner - Carer mismatch issues

1. Complications can occur for the Support Assistant where QR codes can match to the incorrect time and visit.
   Please note: This can occur when the Support Assistant is trying to input an unplanned visit like a dignity call or a buzz call, but it has matched it to a pre-existing visit with tasks. They cannot do anything on the tablet that is why it is important we unallocated this visit, so it is not affected, and we issue a new unplanned visit.

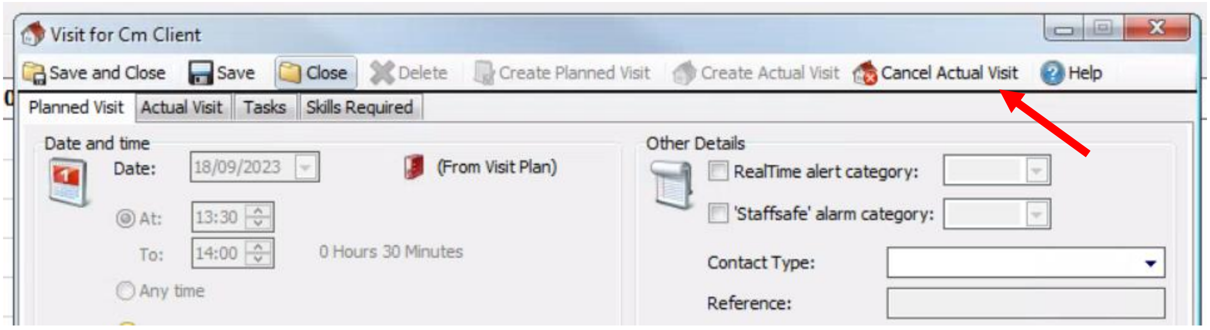
2. When a visit has been mis matched to show they have arrived hours before they should have done. Please go to "Daily Planner" find the visit in question under clients. It should be grey.



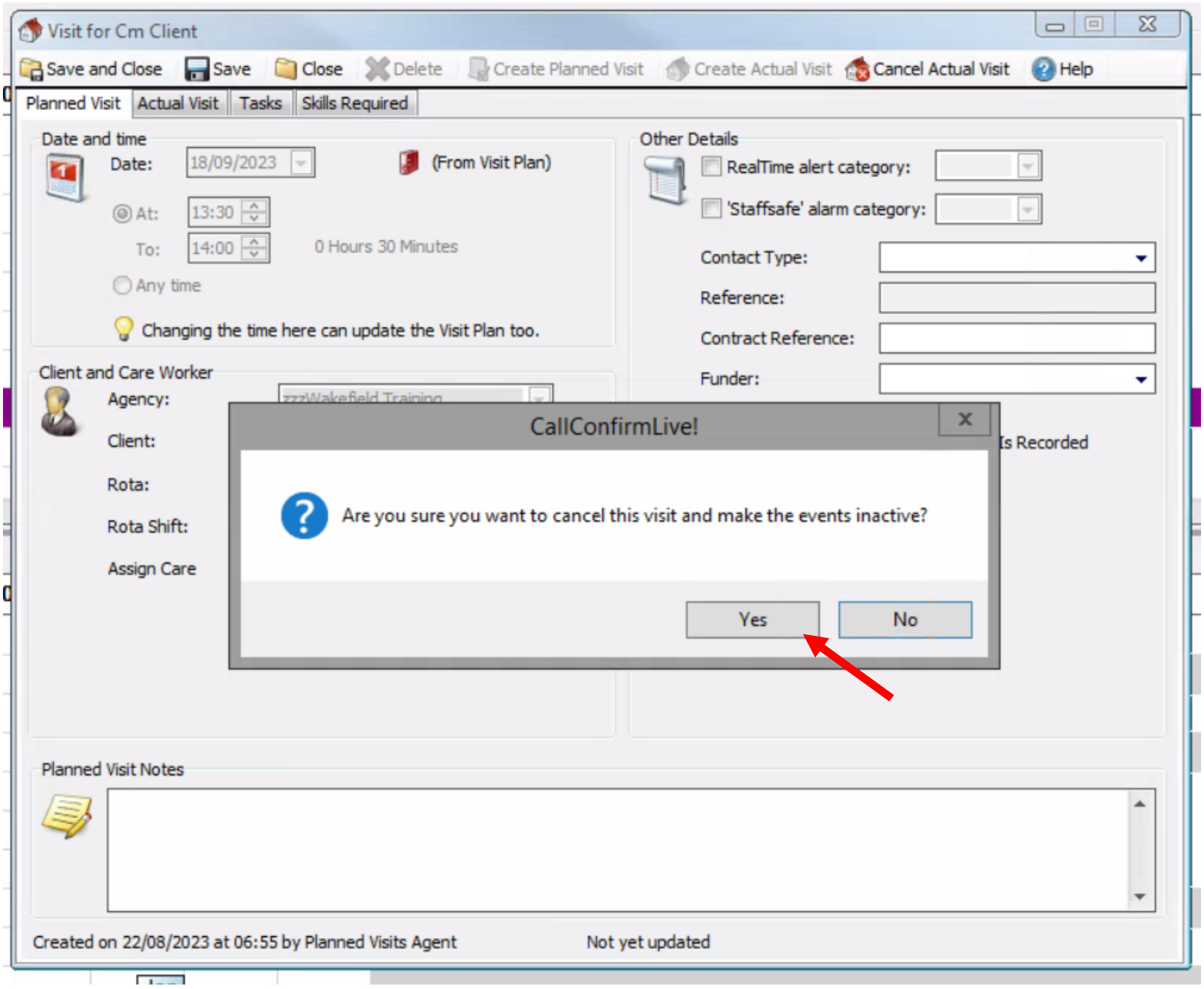
3. Right click the grey mismatched visit and select "**Open Visit**".



4. This will open the "**Add planned visit**" screen. Up at the top toolbar, select "**Cancel Actual Visit**".



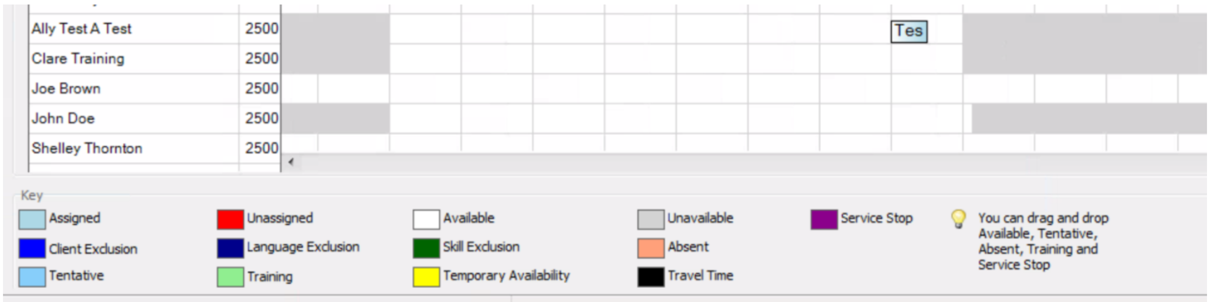
5. A new confirmation box will appear and just accept it. "**Yes**".



6. Then select "**Save**".
7. Then if they need the actual unplanned visit recording, please refer to the "Setting up an unplanned visit" to enter in their actual time.

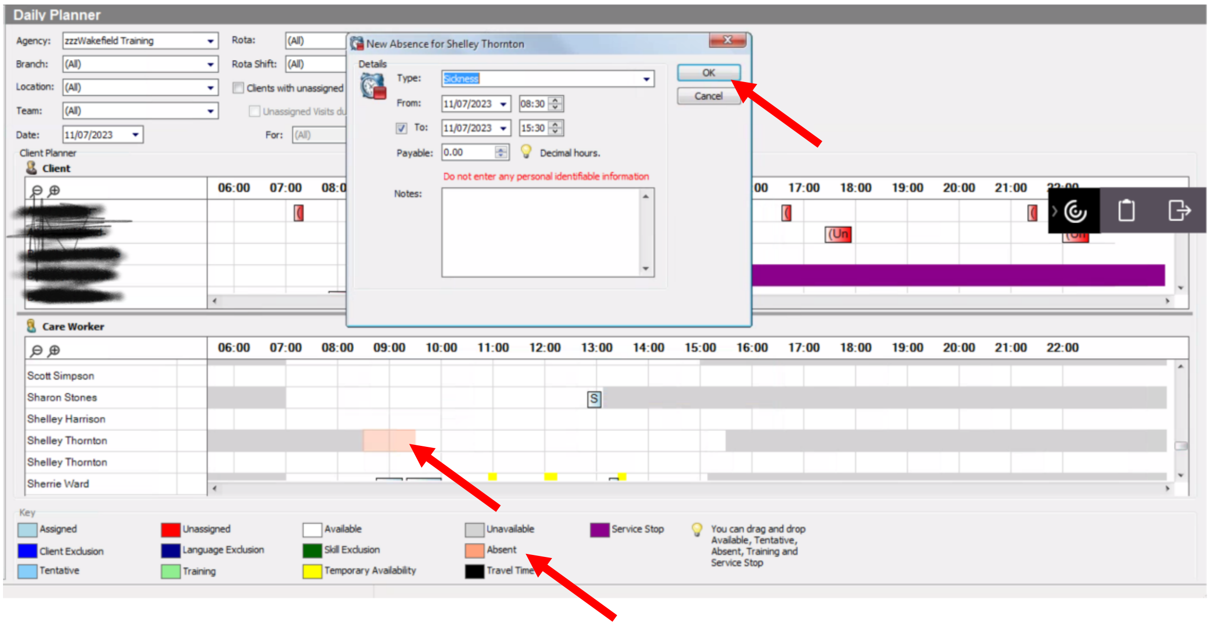
Daily Planner – Key

1. There is an interactable key at the bottom of daily planner, here it will allow you to click and hold and drag coloured boxes onto the carer or client box. Not every key will have a drag function but things like absences and training you can.



Absent

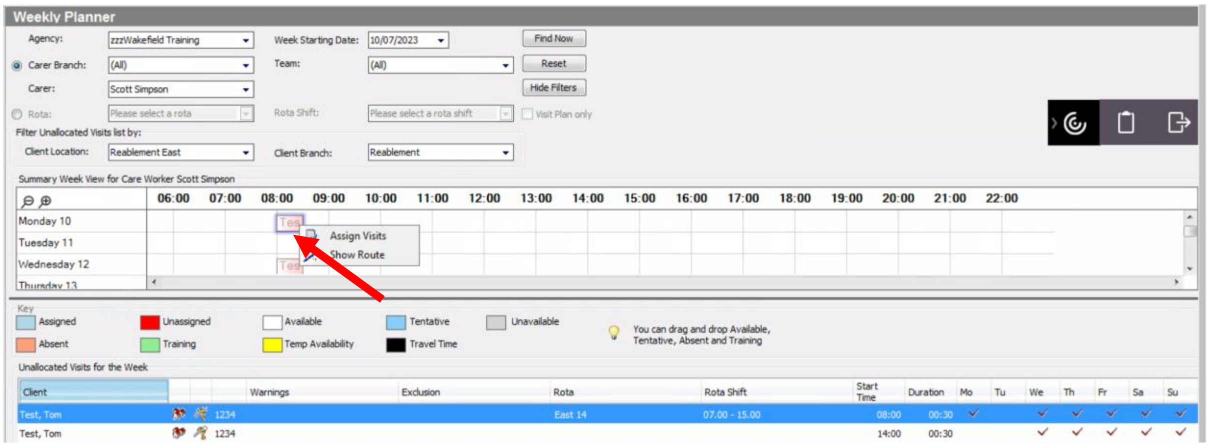
1. If a carer is absent, a quick way of unassigning all visits for the day including adding an absence note is by left clicking and holding the key colour “absent” and dragging that onto the open white space in the bottom Support Assistant box next to the carers name. When dropped it will open a new window that will ask you the absence reason and time. Leave “payable” blank, add the “to” and add notes when required. Then select “ok.”



Checking capacity

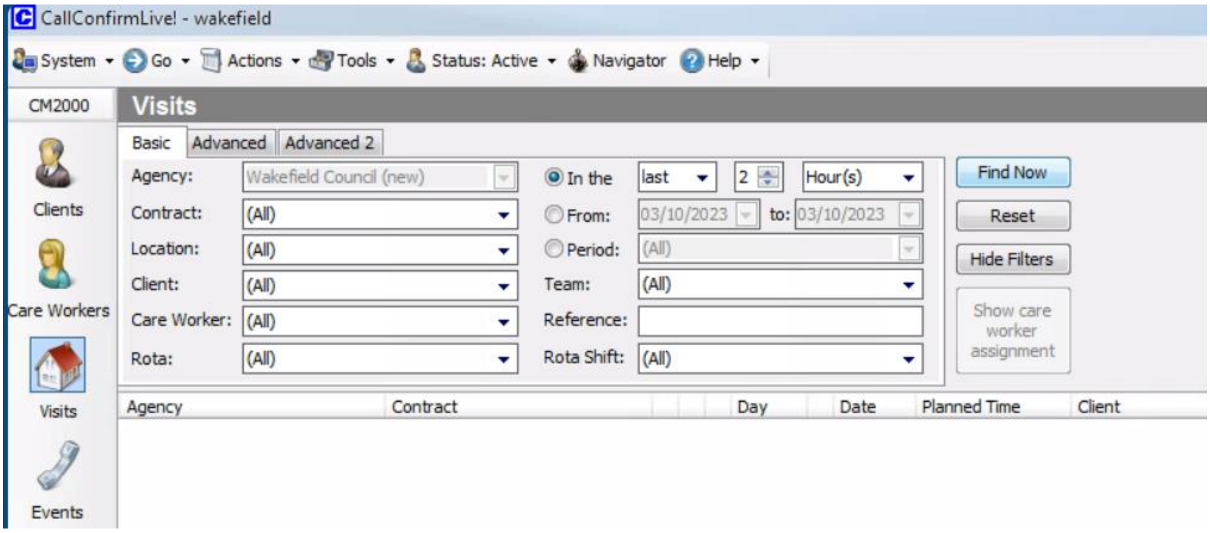
1. A visual way of checking for capacity falls underneath “daily planner” and “weekly planner.” Select the filters and sector as required and that will show how visits and the number of carers available.

2. With “**weekly planner**” you can see general capacity via rotas and individual Support Assistants. Filter your search and Support Assistant, then on the bottom box it will show on the right any ticks or blanks to highlight scheduled or not scheduled. Right click on the top box to assign the visit to the selected carer.



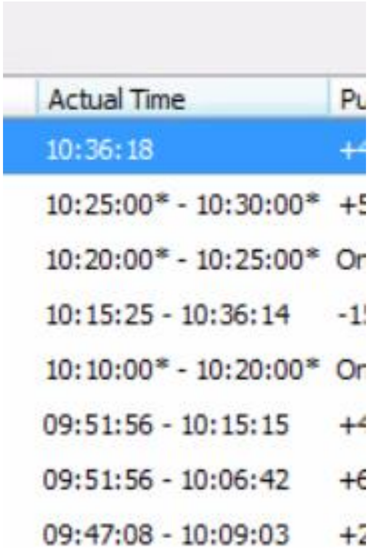
Visits

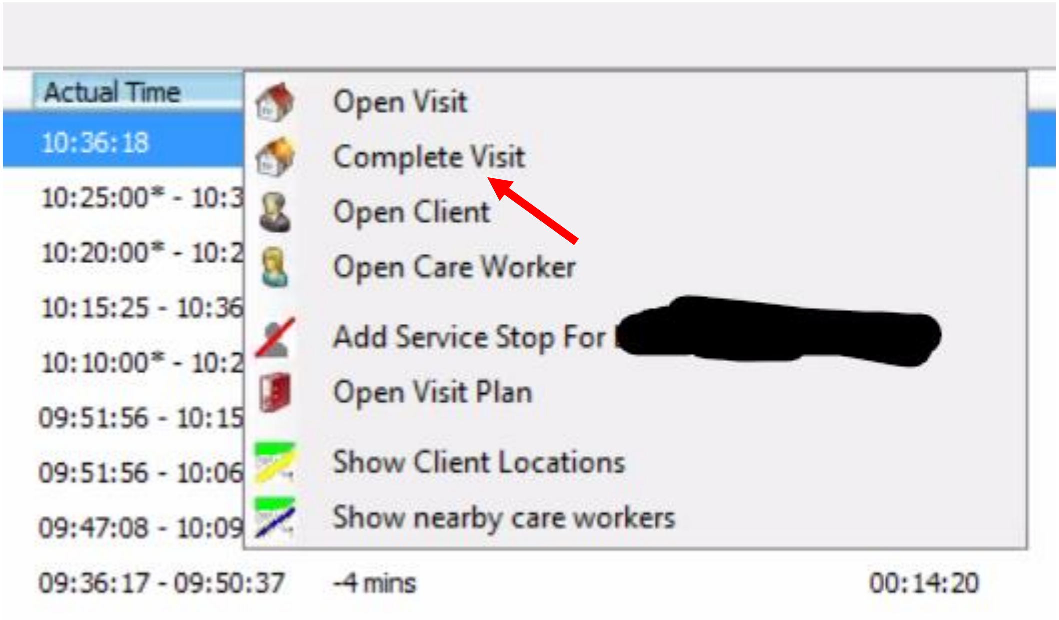
1. Visit screen is a great and easy way to track what is occurring during a specific time frame.



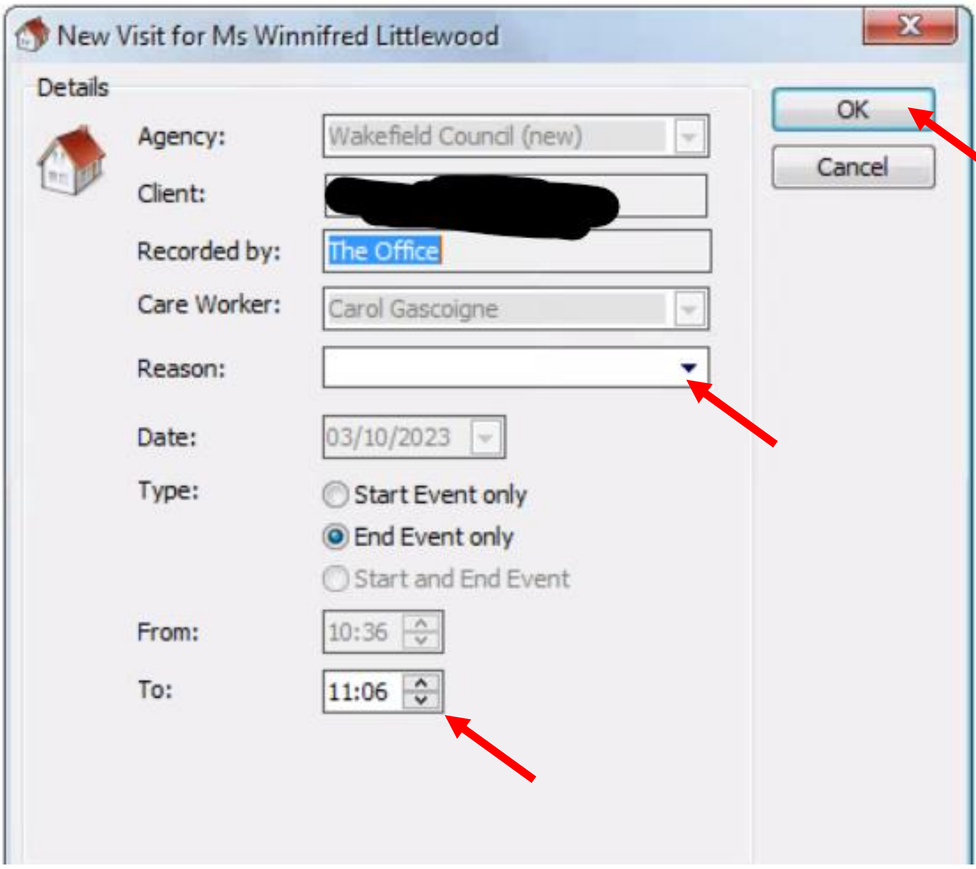
Visits – Completed Visits

1. Situations occur when a carer has not fully log in or log out correctly, so an actual time is missing. If this occurs, right click the visit, and go to "Complete Visit".





2. After selecting “**Complete Visit**” a new window will appear. This will allow you to select a reason for the entry including a “**To**” time to mark off when a visit was completed.

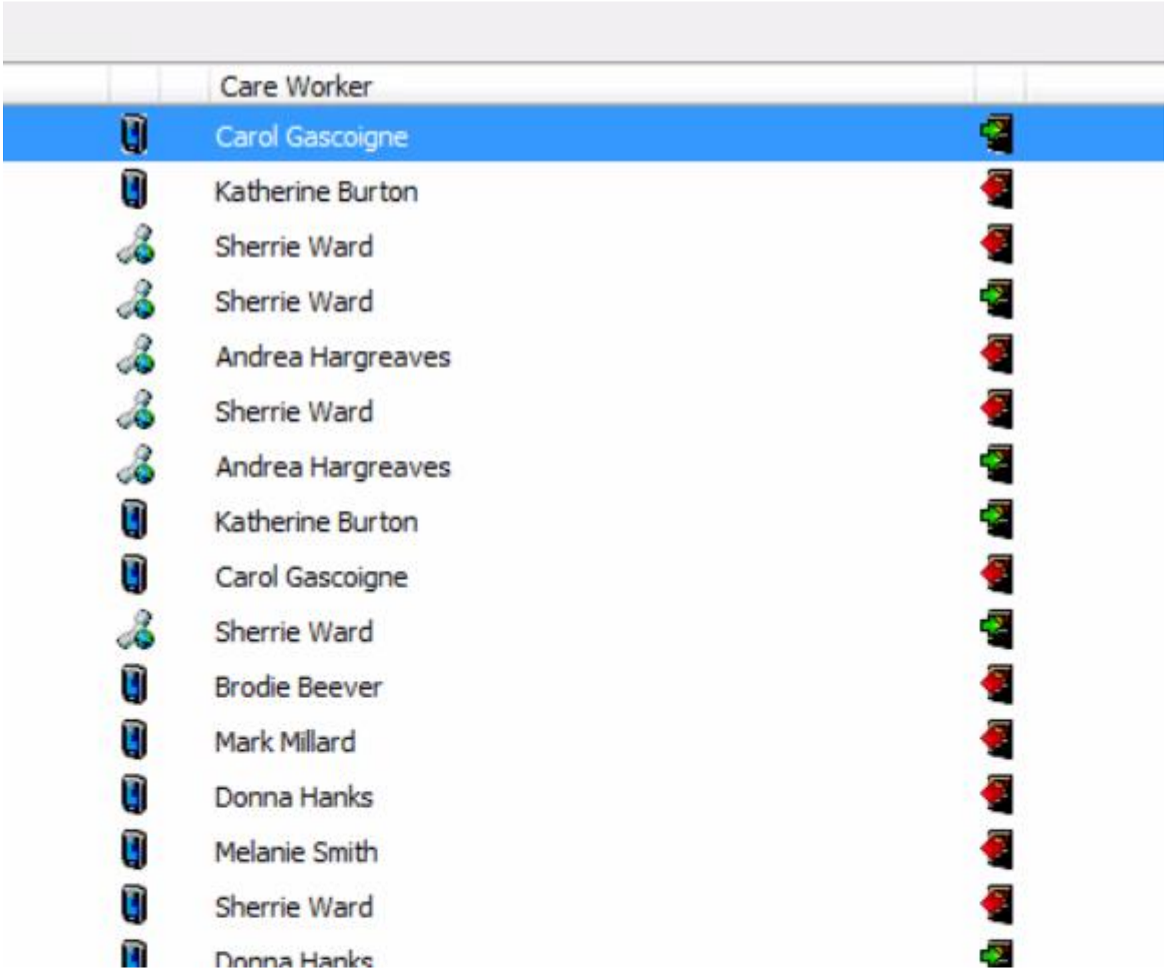


Visits – Icons

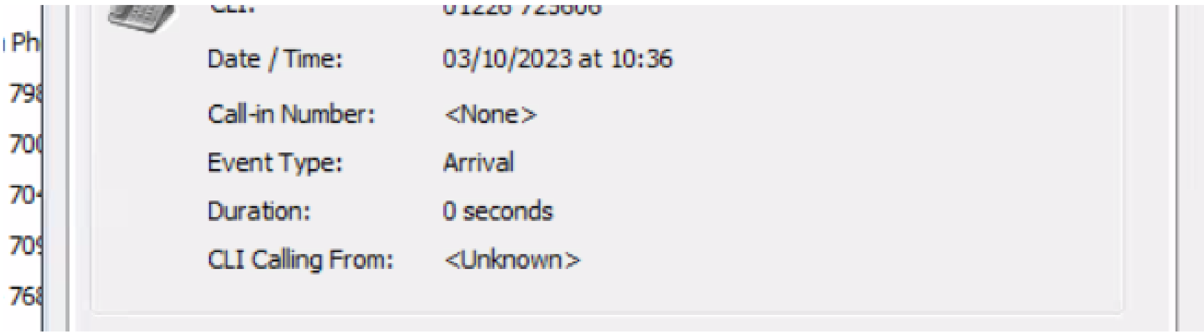
Icon		Status Column Description
	-	The actual visit has taken place
	-	The Care Worker has only logged one call
	-	The planned call has not taken place
	-	A call is scheduled to take place
	-	The call is in progress (the Care Worker has logged in to the visit and not yet logged out).
	-	There are access notes in the Misc. Details tab on the client record
	-	There has been an Ad Hoc change to the visit (different from visitplan)
	-	This is part of a double up visit
†	-	The login has been entered by the office (software visit)
*	-	The visit has been logged remotely either by anywhere remote number or by using the answered call back feature
		Punctuality Column Description
	-	The actual visit took place earlier than the planned time (30+ mins)
	-	The actual visit was late but has been completed or is in progress (30+ mins)
	-	The actual visit is running late i.e. the Care Worker has not yet arrived
	-	The visit has been marked as checked i.e. the Client cancelled the visit
		Real Time Alert Column Description
	-	A Real Time Alert has been set for this visit
	-	A Real Time Alert has been activated for this visit
	-	A Real Time Alert has been set up against the visit but not against the client therefore the alert will not be raised
		Duration Column Description
	-	Roughly a quarter of the planned time was delivered
	-	Roughly half of the planned time was delivered
	-	Roughly three-quarters of the planned time was delivered
	-	Roughly all the planned time was delivered
	-	More than planned time has been delivered

Events

1. **Events** are a great way of checking how a visit was logged.



2. Double click on one and it will show you the “Event Type”.



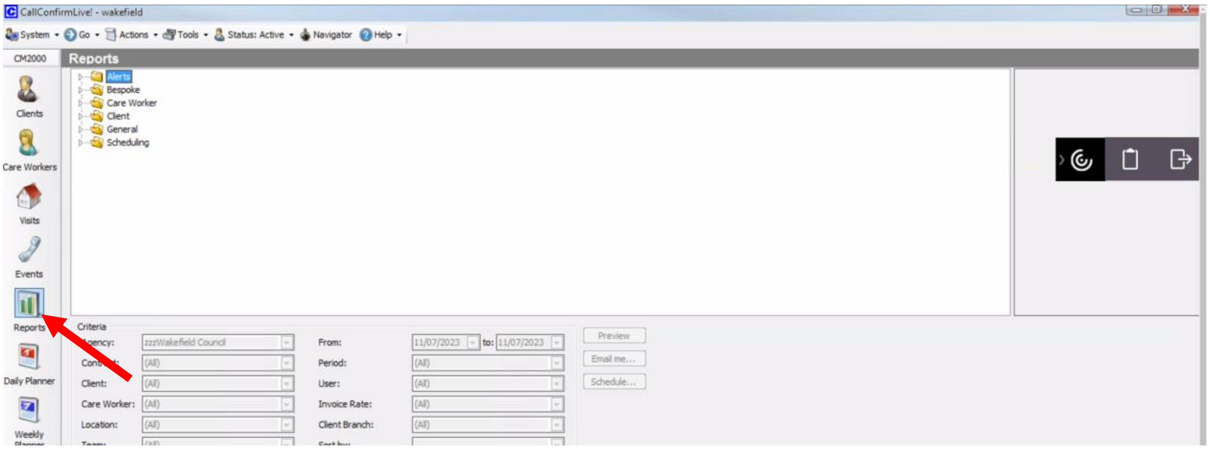
3. The icons available show what type of call was created and if they arrived or left.

Icon		**Call Type Column Description**
	-	The Event was created through the CallConfirmLive! software by an administrator
	-	The event was recorded using an MWS phone

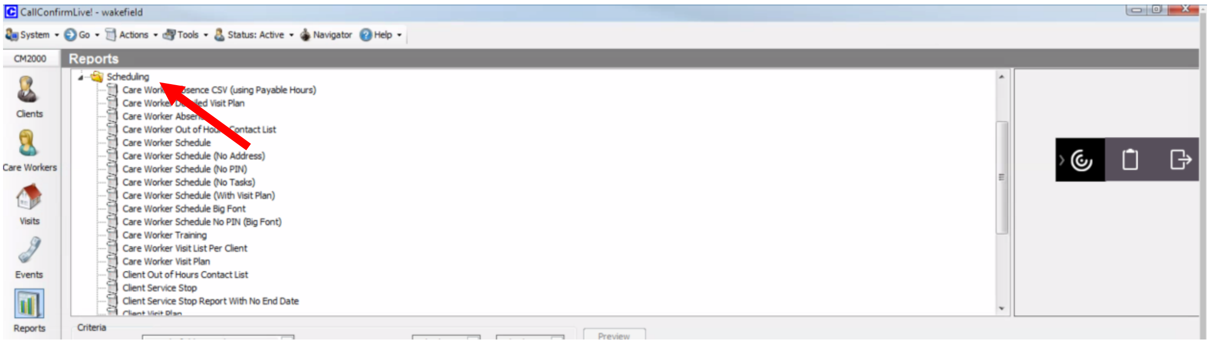
		Log In/ Log Out Column Description
	-	A Care Worker has arrived at a visit
	-	A Care Worker has departed from a visit
	-	The event type i.e. arrival or departure is unknown

Printing Case Worker Schedules

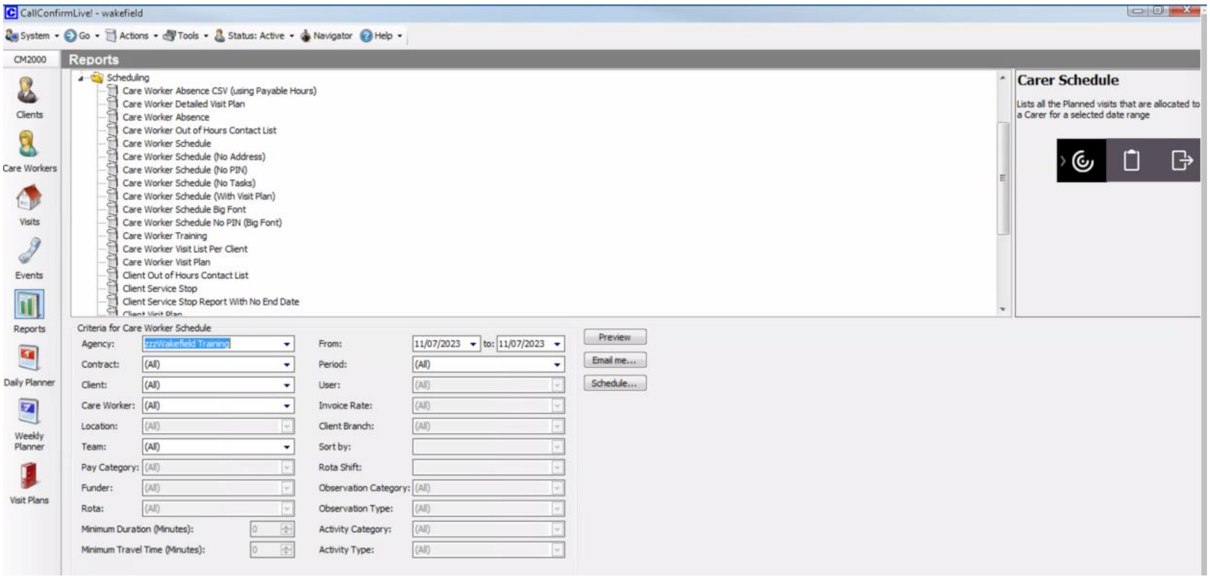
1. To print off case worker schedules, you will need to go to "**reports**" on the left-hand side.



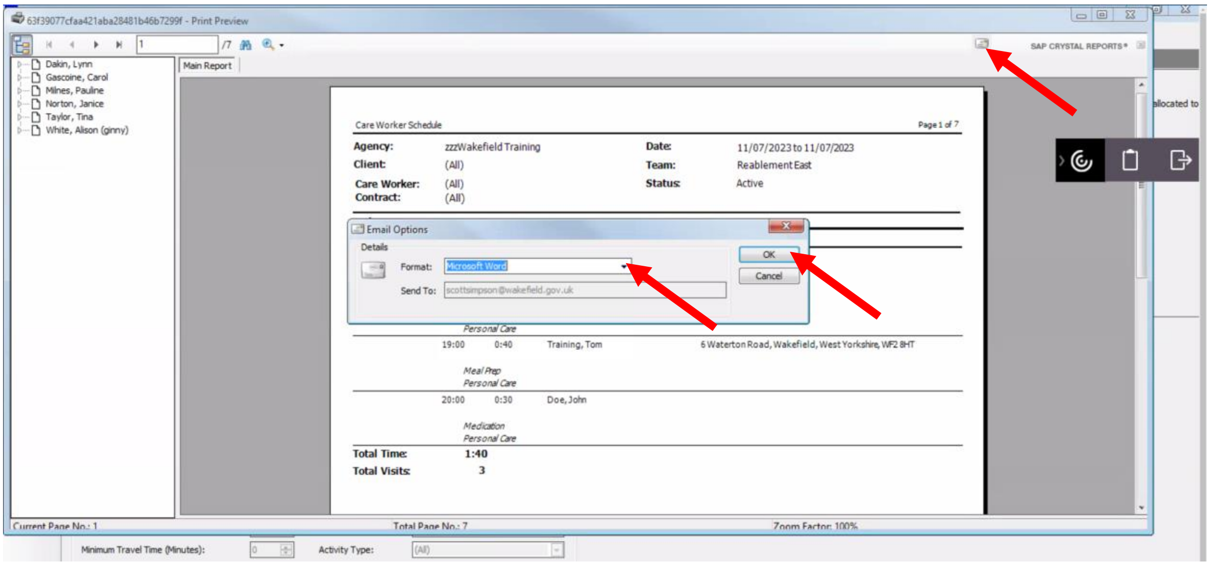
2. Selecting the arrow next to the "**scheduling**" folder, will expand the list.



3. Then select the “**Care Worker Schedule**” report from the dropdown list. Once selected, the filter parameters at the bottom will change title to show “**Criteria for Care Worker Schedule**.” Here you can select the team, carer, location. If you select the relevant team, when printed, will show all the visits scheduled for everyone under that specific team. When completed, select “**Preview**.”

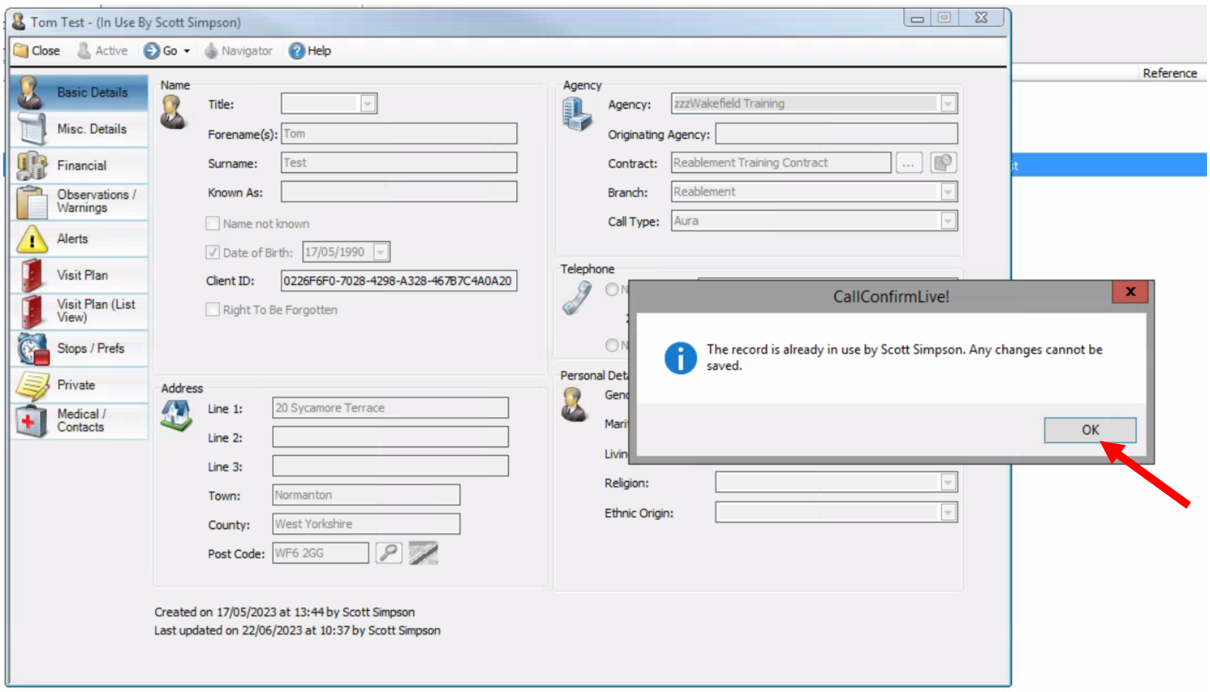


4. When opened, check to see if this information is correct. Then, select the email button in the top right. A box will appear asking what format you would like this as. If it is going around your team and not to a client, print in Microsoft Word. Then select “**ok**.” This will email you this preview as a word document.

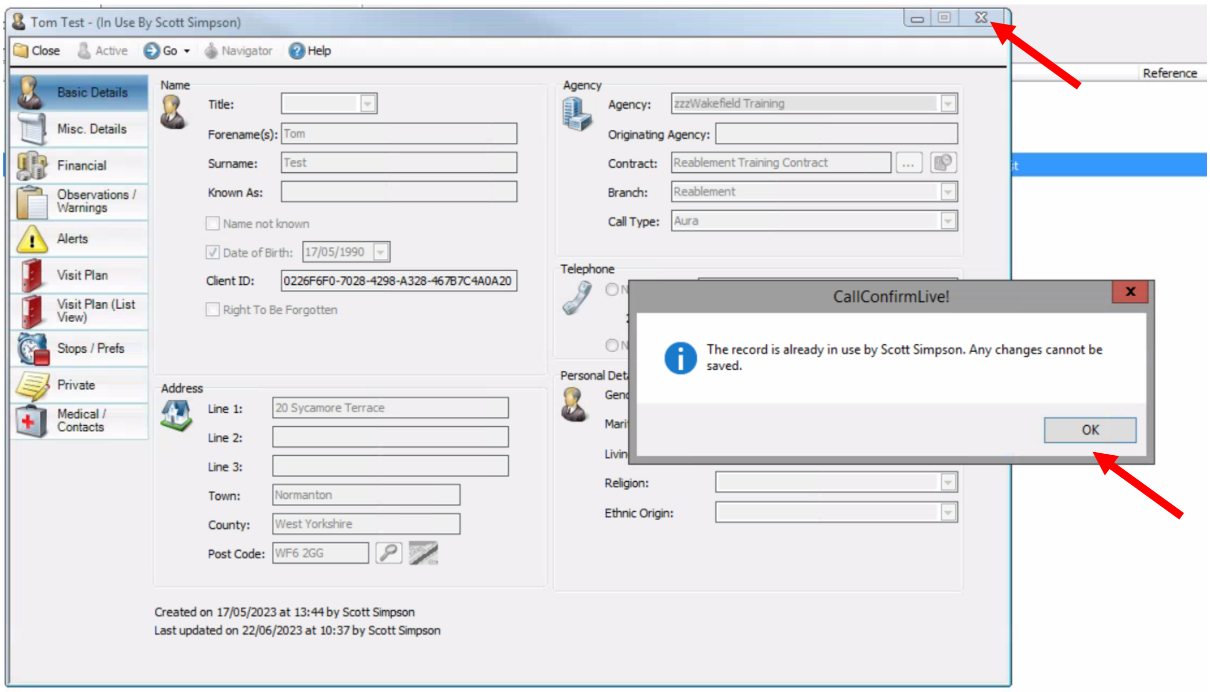


Disappearing windows

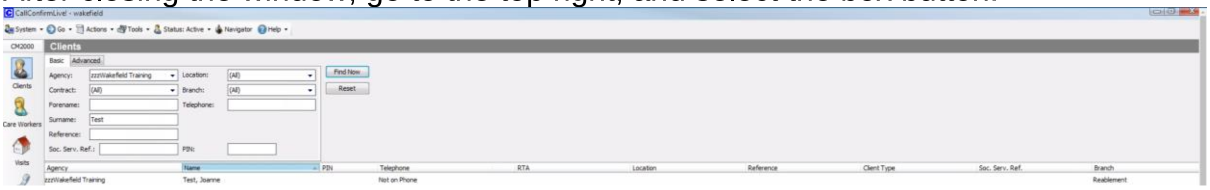
1. The possibility of windows disappearing will result in the inability to add anything to a record. This is an example of the error you may see.



2. To rectify the situation. Select “**Ok**” on the error and press the “**X**” on the top right of the greyed-out window.

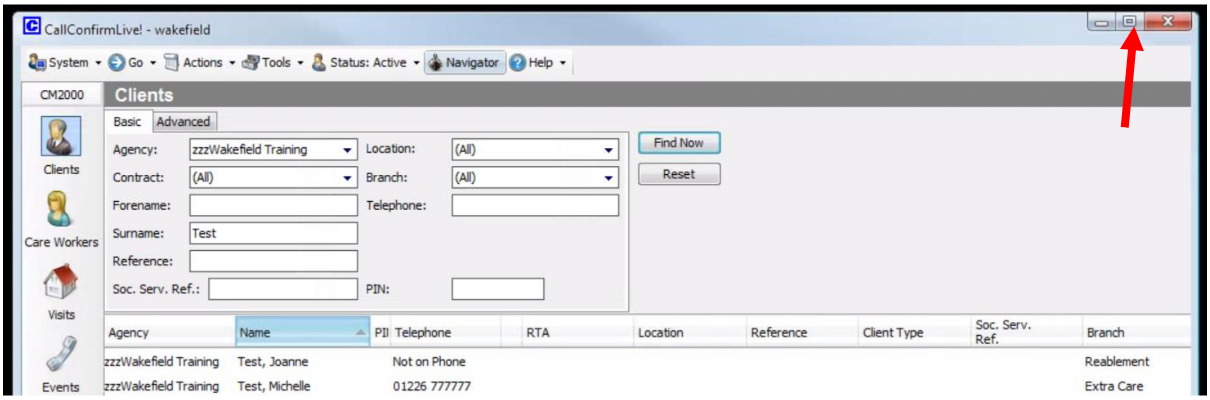


3. After closing the window, go to the top right, and select the box button.



4. The window that has disappeared will either be behind the window you made smaller, or it will be in the bottom left. If it is behind that simply select the window to bring it forward. If it is in the bottom left, select the top bar, and select **Restore**.

5. The window, which disappeared, will now be bigger. Complete what you need to and when you **Save and Close** to the original window you made smaller and select the box icon again to make larger.

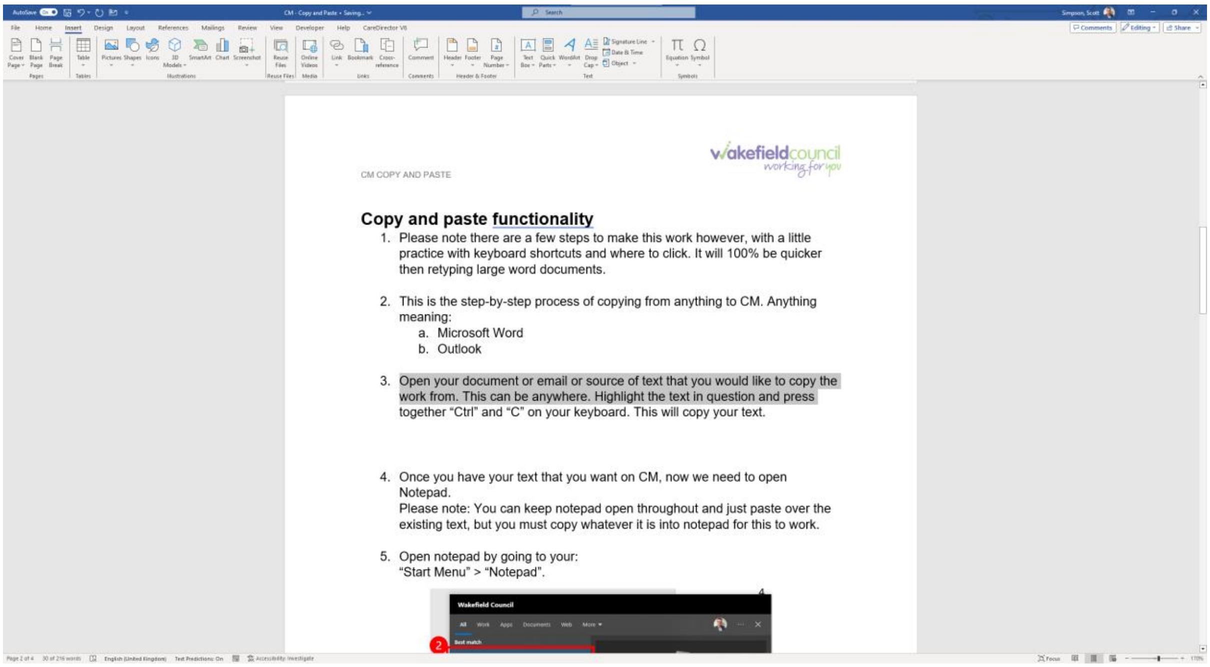


Copy and paste functionality

1. Please note there are a few steps to make this work however, with a little practice with keyboard shortcuts and where to click. It will 100% be quicker than retyping large word documents.

2. This is the step-by-step process of copying from anything to CM. Anything meaning:
    a. Microsoft Word
    b. Outlook

3. Open your document or email or source of text that you would like to copy the work from. This can be anywhere. Highlight the text in question and press together “Ctrl” and “C” on your keyboard. This will copy your text.


CM COPY AND PASTE

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4. Once you have your text that you want on CM, now we need to open Notepad.
Please note: You can keep notepad open throughout and just paste over the existing text, but you must copy whatever it is into notepad for this to work.

5. Open notepad by going to your:
“Start Menu” > “Notepad”.

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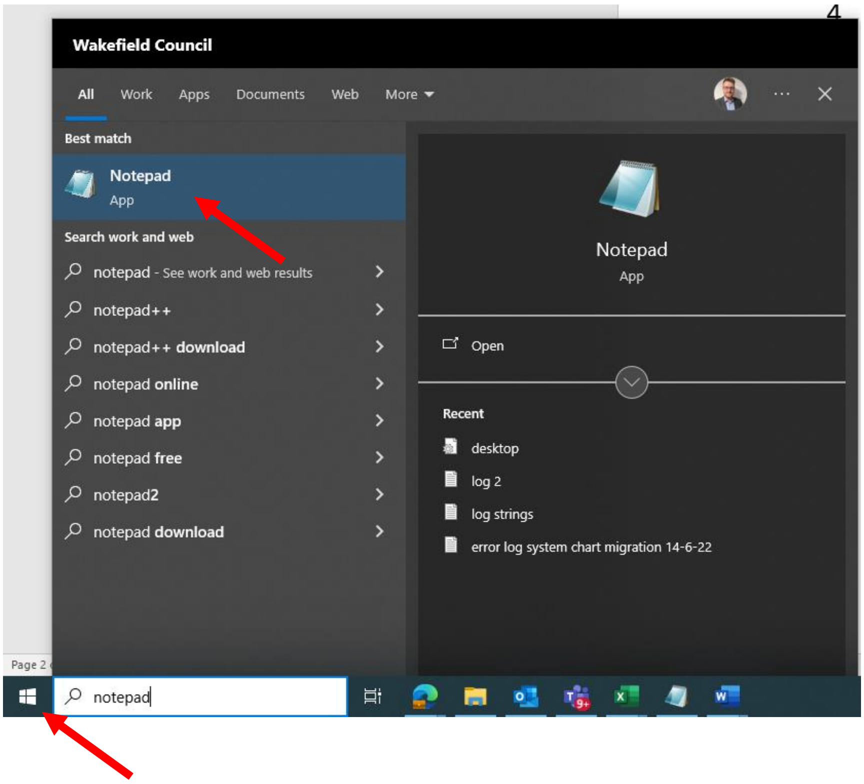
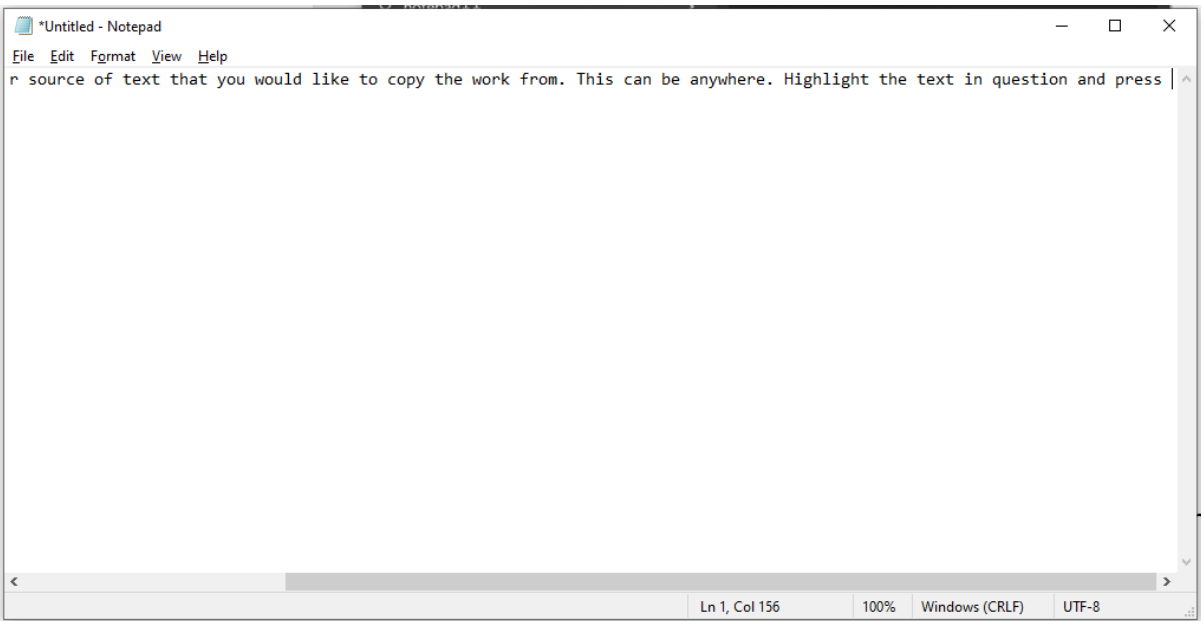
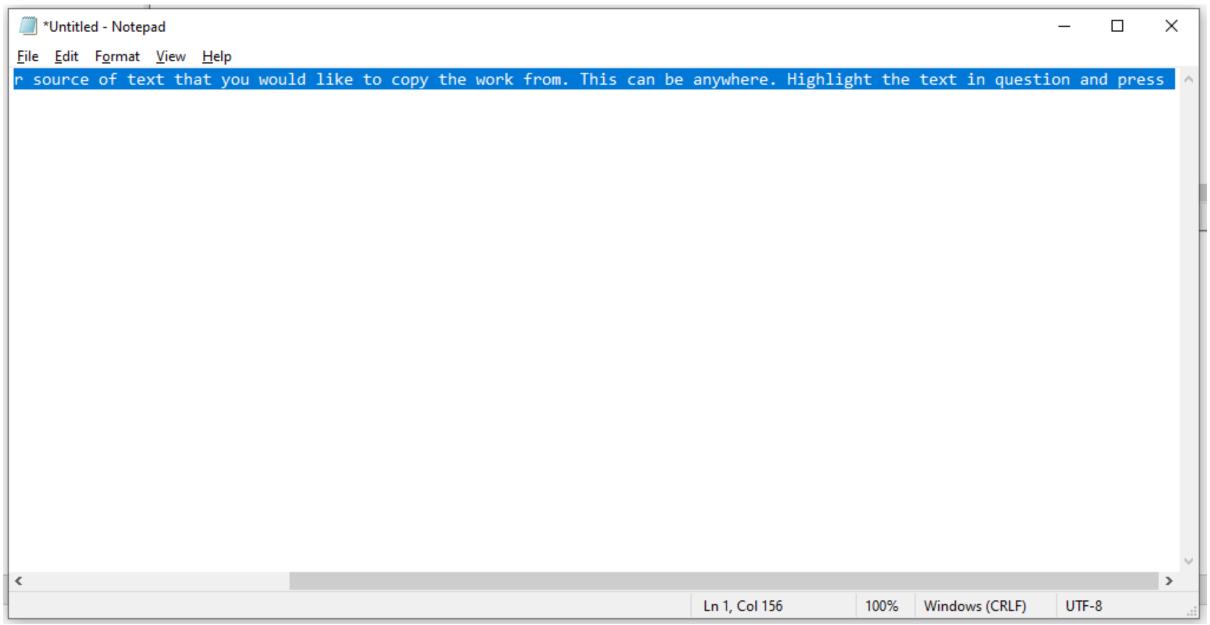


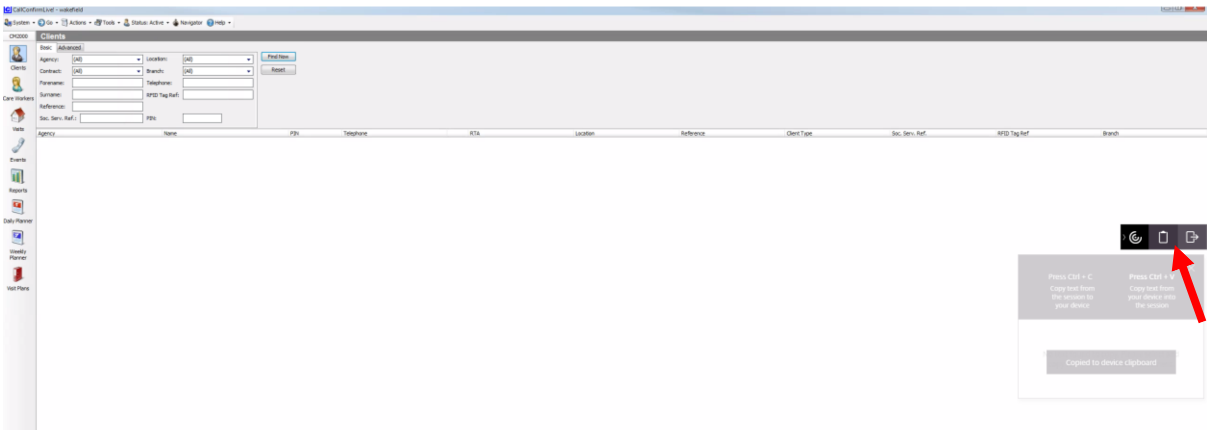
6. Once you have opened **Notepad** please paste by pressing “Ctrl” and “V” on your keyboard.



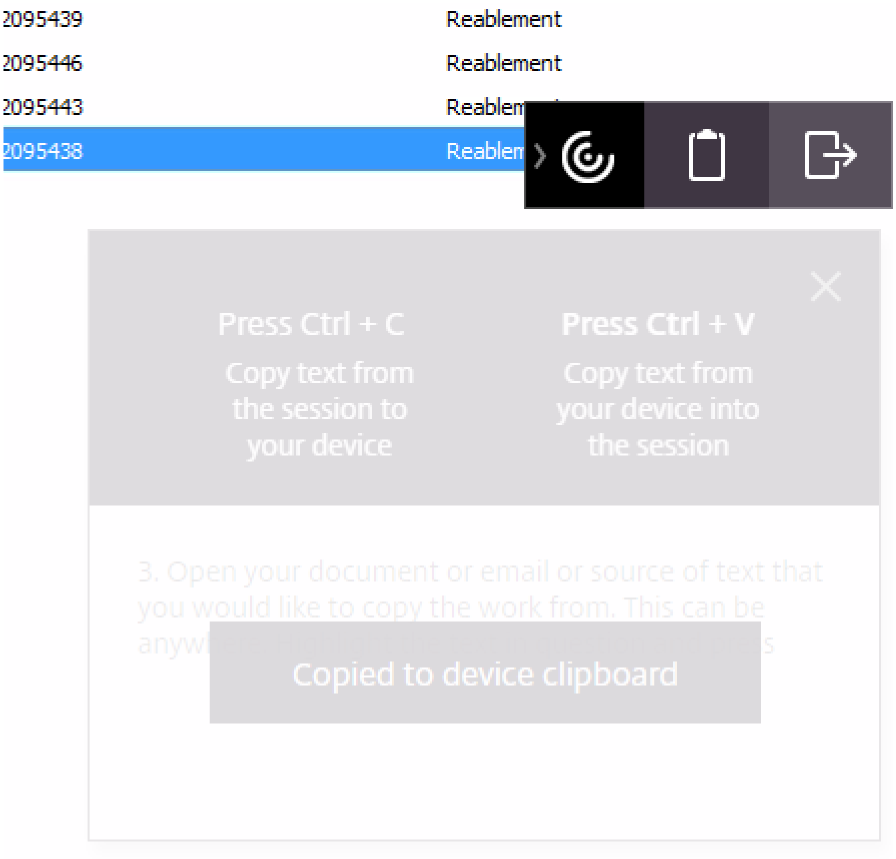
7. It does not matter if it is in one long sentence, this is ok. Now that we have pasted it inside of “**Notepad**” we now need to reselect all of it. You can do that by pressing “Ctrl” and “a” on your keyboard. This will select everything inside of the notepad document, so please ensure if this is the next time using it you are not copying anything else. This will highlight everything and then copy it “Ctrl” and “c”.
   Please note you do not have to save the notepad document.



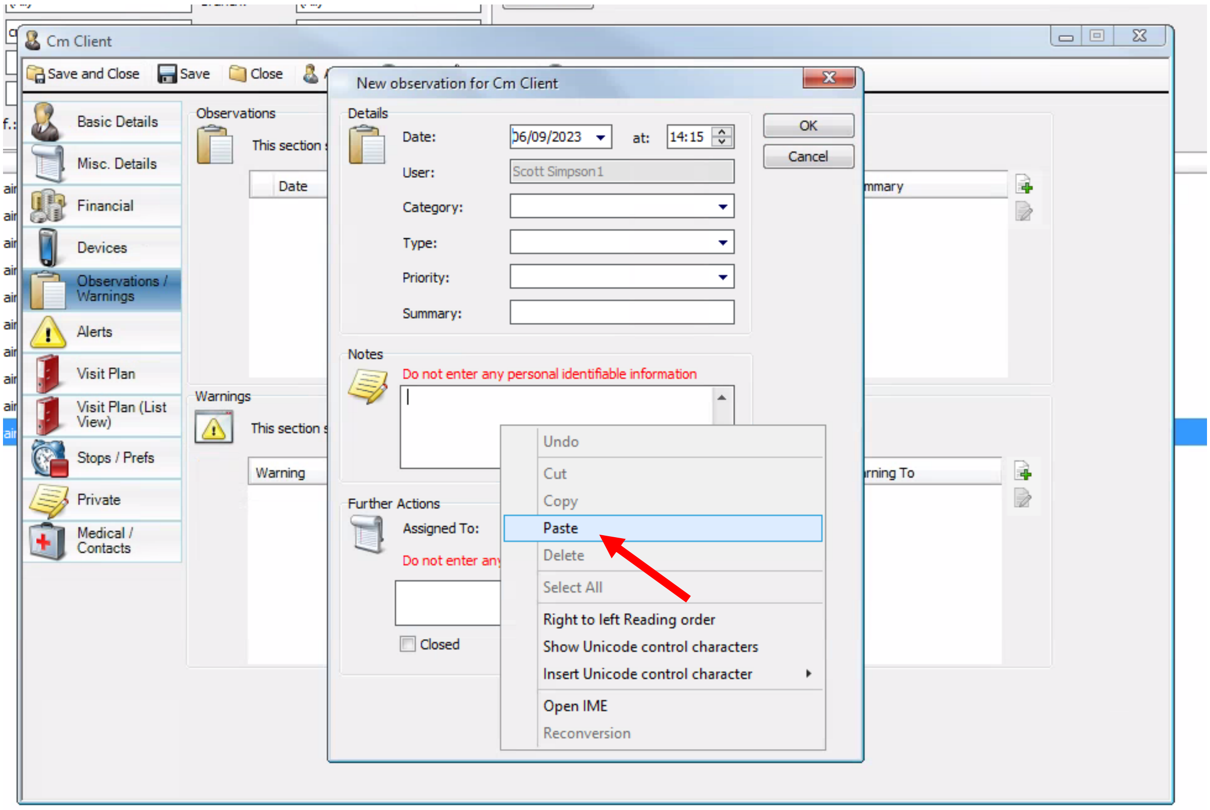
8. Go over to CCL and on the right-hand side you will see a little black box. Press that to open it and the middle one should say “**Open Clipboard**”. Select that and “Ctrl” and “v” to paste what we had in our notepad.
   Please note: the right click method of pasting does not work you need to press “Ctrl” and “v” for it to be pasted in there. Press “**Open clipboard**” and then “Ctrl” and “v”.



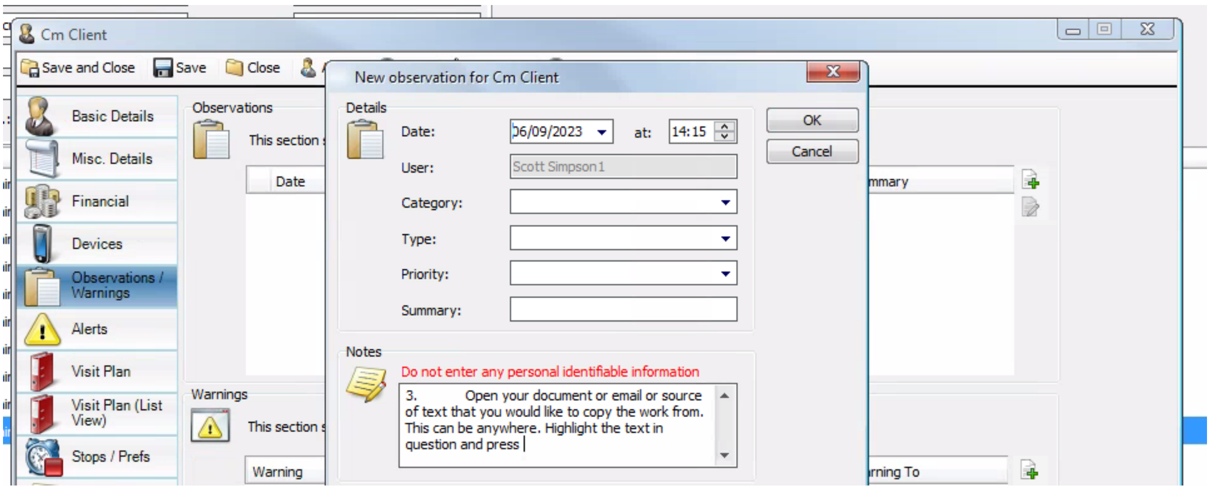
9. Now that has been pasted into the "**Open clipboard**" option, we can now copy it again using "Ctrl" and "c". When you see "**Copied to device clipboard**" it means you have copied it and can use it. Please ensure you then open or select the box you wish to place this text into before pasting otherwise you will have to repeat the copy and paste step.



10. Now that we have copied to device clipboard, open or select the box we want this information to go and then right click and paste. (This is to ensure we do not paste back into the little black box as we will then need to re copy and paste).



11. We have now pasted into CCL from a Microsoft Word document.



CM Mobile

1. You will primarily be using CM Mobile for pre-visits. This will have forms within them to complete during your visit. This can be done on your tablet or laptop. However, a lot of this information is to show you how to use CM Mobile as well as talking through your key principles.

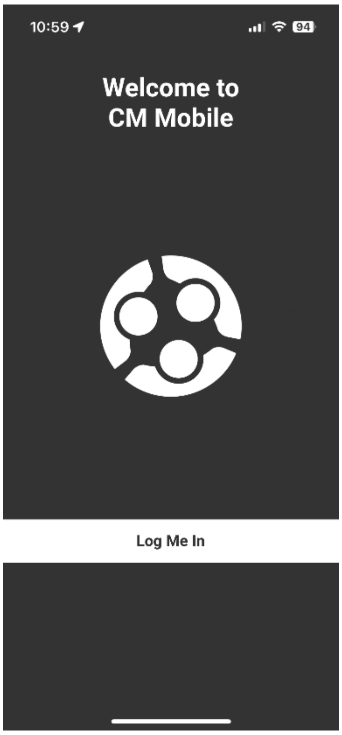
2. Aspects of this section will not be 100% relevant, however it is good to know how it works to help Support Assistants in the future and understand if there are questions and problems around it.

Tablet Login

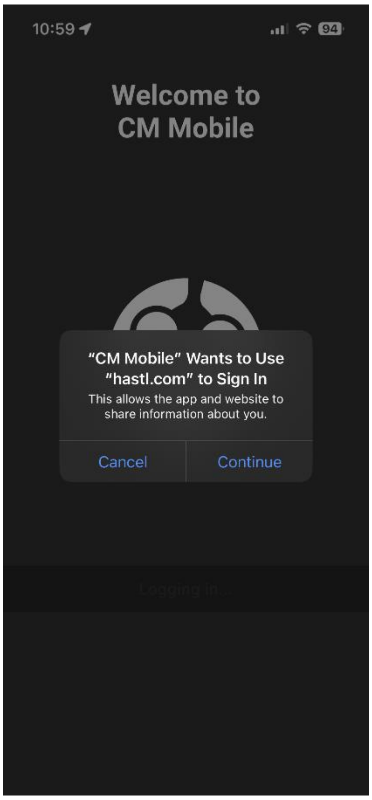
1. To gain access to the CM Mobile app, please ensure you have updated your tablet, download Microsoft Authenticator, and have downloaded CM Mobile. All guidance is linked here: CM – Tablet Setup guide.

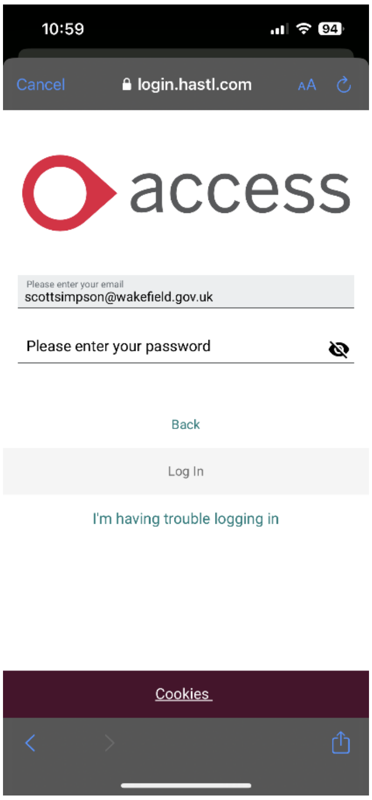
2. To receive your CM Mobile login, first you require training. Please talk to your manager, who will book you into new starter training for CM Mobile as it is important, we go through the basics and fundamentals of the system before giving full live access.

3. After you have received your log in details – which will be sent via an email from Hastl, open “**CM Mobile**” and select “**Log Me In**”.



4. It will then direct you to a log in page, if before this you encounter a warning message about google chrome please select “**Continue anyway**”.



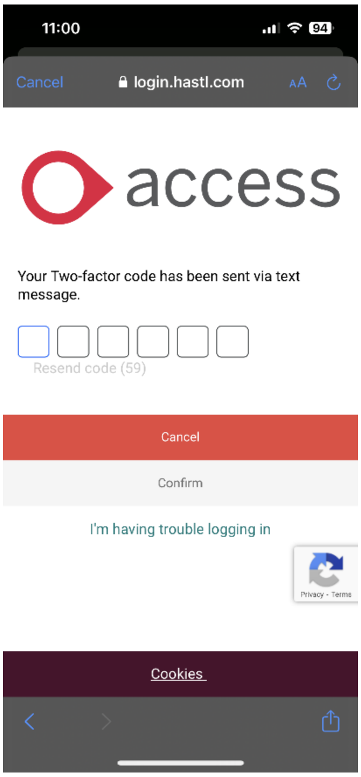


5. To set up your password, you will have received an email asking you to confirm and set up a password for your account. Type that emails and password into the next two screens and select “**Log in**”.

6. It will then send you a text message to your mobile phone associated with your account for 2FA (this will be your work phone).

7. When you have entered in the two-factor code that has been sent via text message select "**Confirm**".

8. This will then log you into CM Mobile so you can view and log your visits.



Offline Functionality

1. CM Mobile does work whilst signal or internet connection is poor. However, this is only when you have already logged into CM Mobile.

2. When opening CM Mobile for the first time in the day, you need to have internet or 3G/4G to sign in as it will not allow you to see your visit schedule or log into visits.

3. Find a location where signal is ok, sign into CM Mobile. Now you can move away and complete your visits in a poor connectivity area.

4. Whilst being offline during your visits, your tablet will "**Scan QR**" just fine but it will not change anything on screen. It will not go yellow or green. This is the same as visit logs (journal entries) you can type out your visit log and save it, but it will not appear. You cannot complete your tasks whilst connectivity is poor.

5. After you've re-entered an area with stable connectivity, the system will automatically update and upload the QR codes you've scanned, changing the status of your visits to green. In case this process does not occur automatically, please contact the office. Additionally, your notes will be uploaded. It's important to wait for this update to happen before entering a completed visit to mark your tasks as completed.

Key Principles

1. The discussion in your training session will have directed you to acknowledge that the system will be rolled out in sections. This is a working document therefore, as a new section is incorporated amendments will appear here. Please use key principles for a quick step by step process map for when using the tablet for a visit.

2. Use CM Mobile to log in. No need to log out each time; simply lock your screen. After a short period, you'll be automatically logged out, but you can log back in quickly. If you are entering your email and password by typing rather than it is appearing for you to press "**Next**" then "**Login**", please refer to the FAQ section of this booklet.

3. Visit programme: The first screen you will see will be your planned visits for the day. Information such as how many tasks, name, address, duration, planned time (actual time will appear after you scan QR) and if it is a double up. You can select anyone of those at any time to open the second screen.

4. When going to your (first) next visit it is important to check for any existing notes and key safe number. Please be aware the person still has their client record booklet, the notes found under "Client Notes" and "Planned Visit Notes" on the second screen is information the practitioner/ co-ordinator/ scheduler feels is important for you to know prior the visit (this might be in the form of an alert/ hazard or if they have gone back into hospital recently). Key safe number is in the second screen.

5. After all information has been read and you've entered the property, you will now need to "**Log In**" via scanning the QR code. On the first screen, press "**Scan QR**" and point it towards the QR code inside their property. If there is no QR code, please use manual logins or phone using their landline or codes.

6. When scanned, you will see a tick and a "**matching visit**" message at the bottom. You do not need to wait for confirmation just go on through and start the visit by looking at the tasks inside of the second screen. However, to just double check; on the first screen swipe down to refresh and you will see your visit turn "**yellow**", and the actual time will appear.

7. During your visit you will set up the client record booklet and fill out any pre-visit forms you have. This can be done on the tablet or the laptop.

8. When the visit has been completed, go back to the first screen and "**Scan QR**" again. This time wait until "**Completed**" green has appeared. Once it has by scrolling down to refresh the screen, go back into the second screen of the completed visit and open tasks. Now you will be able to mark off the ones that

have been completed (regardless of whom did it, just ensure you are making a journal entry into who did it), do not mark the ones that have been refused or has not been done (just ensure you are making a journey entry on why they have not).

9. Then check for your next visit and repeat from step 4.

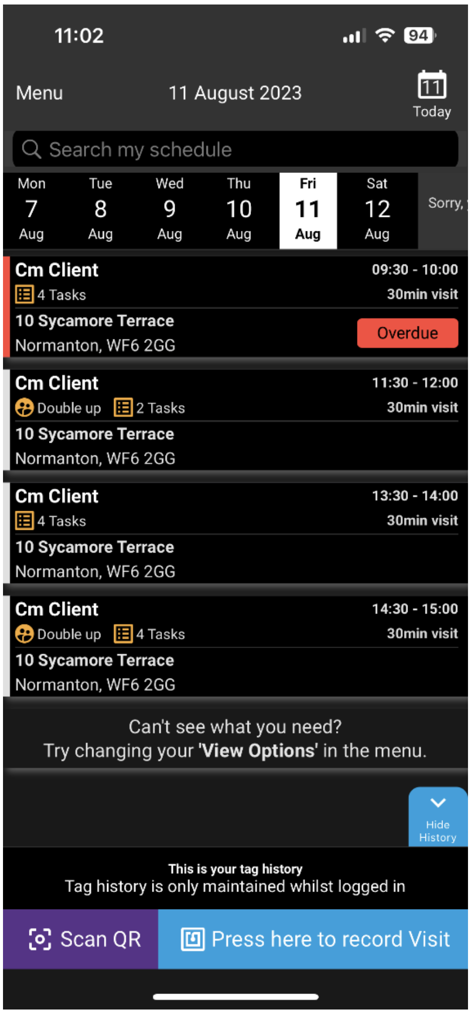
10. (Unplanned visits) As these are all planned visits, any buzz calls, dignity calls or emergency entries need to be logged. To do this, simply “**Scan QR**” as usual and if it matches to an existing planned visit, please let office staff know so they can remove it.

11. (Extra Care) You are to use the “**Scan QR**” functionality on visits that are conducted within their own flat. When it comes to coffee breaks, walking to dinner hall, etc., please use manual logins with their pins.

First screen

Planned Visit Screen

1. The first screen is what you see when you first log in. This is your planned visit programme screen. It contains information such as how many tasks, name, address, duration, planned time (actual time will appear after you scan QR), if it is a double up, scan QR and calendar to check tomorrows planned visits.

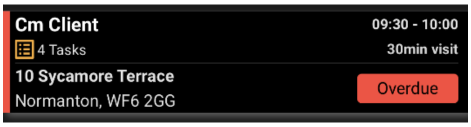


2. This is a touchscreen; you can use your finger to select which visit you want to open into the second screen.

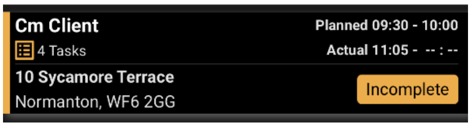
Coloured Boxes

1. The coloured boxes state whether you are late, arrived or completed the visit.

    a. The red "**Overdue**" box will indicate you are late, if this visit requires nudging back or you cannot make it, please ring the office to give a reason and ask for this to happen.



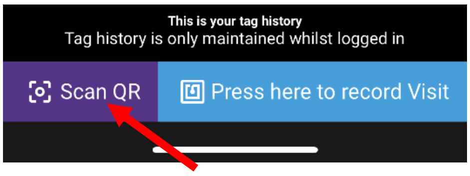
    b. The yellow "**Incomplete**" box means you have arrived and there should also be an "actual" time indicating when you arrived.

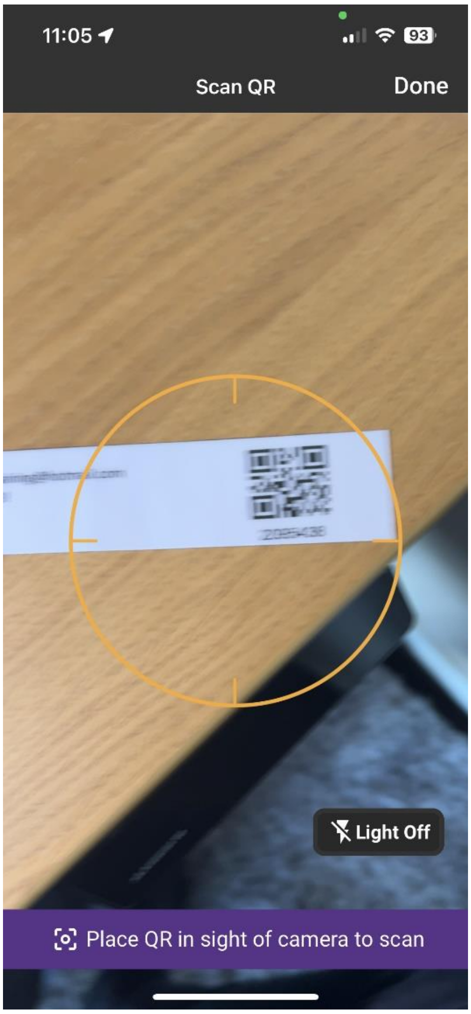


    c. The green "**Completed**" box means you have completed your visit. This is when you can go back into the second screen and tick off any completed tasks.

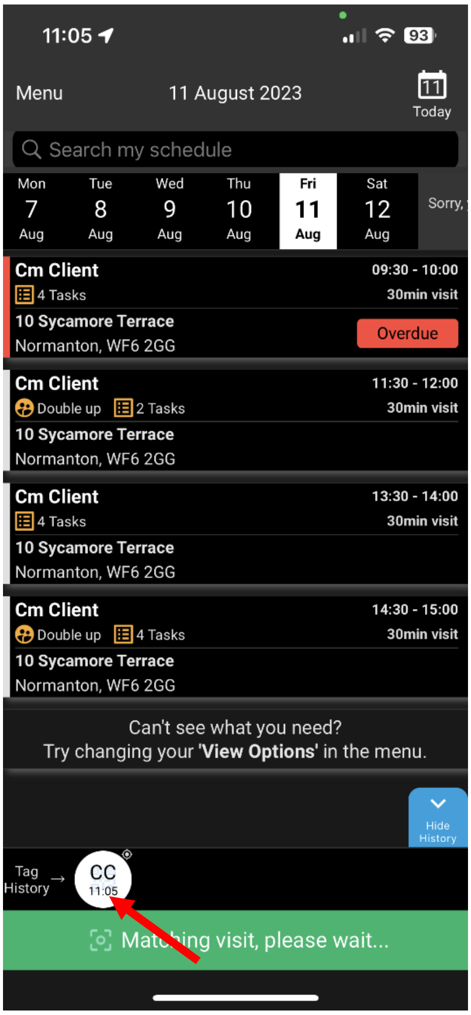
Scan QR

1. The “**Scan QR**” button will allow you to log in to visits. When scanned, the app will automatically match the assigned tag to the appropriate visit. Upon arrival at the visit, find the QR, press “**Scan QR**” and point the camera (which is located at the back right of the tablet) at the QR code and it will scan for you.

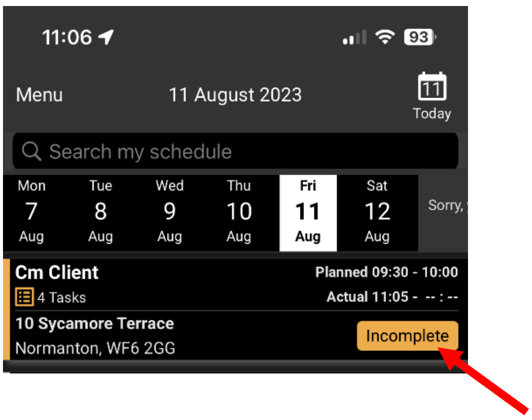




2. Please scan it only once, you will know it has worked when you get a big tick on your screen, including a green matching visit where the "**Scan QR**" button is located. You will also see a CC with a timestamp.



3. Once scanned, the matched visit will turn yellow, and an actual time will appear.
   Please note: if there is an issue if the scan or it has matched to the wrong time, please ring the office. This is not how you do an unplanned visit such as buzz call or dignity calls.

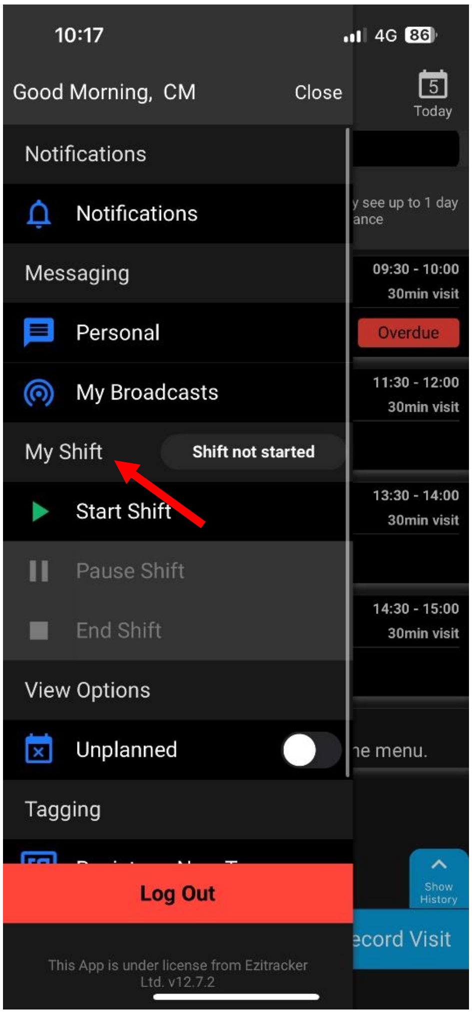


Menu

1. The “**Menu**” option is available from the first screen. Use this for Personal and My Broadcasts messages as well as creating unplanned visits.

Start/ Pause/ End Shift

1. This does nothing, please do not use these.

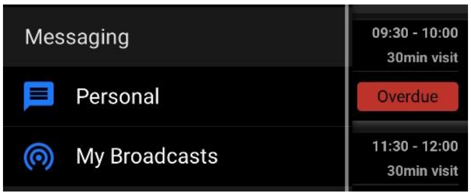


Messaging

1. Personal and my broadcasts are great way to communicate with people from the office and other carers. You will see when you have a new unread message via a little red circle next to "**Menu**".

2. Personal is a direct messaging channel to someone in the office.
   Please note: Office workers must create that link first. If there is an issue and you cannot find the message, please just ring the office.

3. My Broadcasts are group chats with yourself and a few selected others, this could be as small as three people or as big as your entire branch.

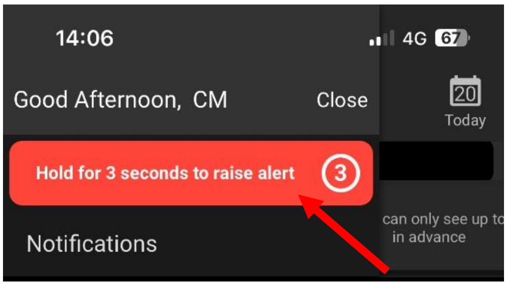


Unplanned Visits

1. This is how you filter planned and unplanned visits you have done. This is not how to scan into an unplanned visit.

Panic Button

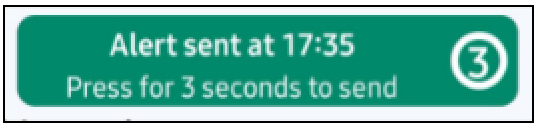
1. This for when emergencies happen. When you raise an alert in the app, an automated call will be initiated to the office.
   “**Menu**” > “**How for 3 seconds to raise alert**” > Hold for three seconds.



2. After holding for three seconds this will initiate a call to the office. The caller will hear an automated message that reads a Panic Alert has been raised and they will be able to identify you by your PIN number associated to your carer worker record in CallConfirmLive!

3. When completed, the following notifications will show within the app.

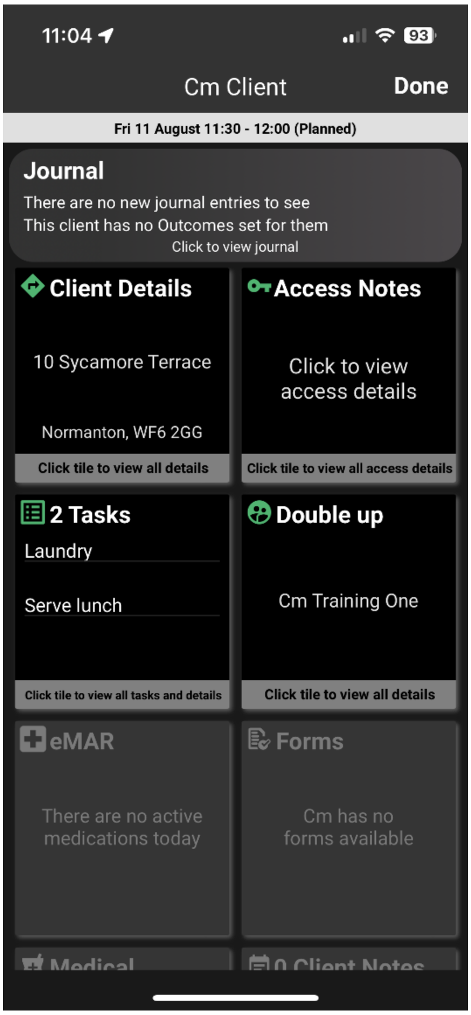
4. You can resend the alert by holding on the green banner.



5. Please note: To use Panic Alerts to send a message to your office the app will need to be online (with a data connection). If this is not in a place with the following, a banner will appear at the top of the menu. Please call 999 on your work mobile instead.

Second Screen

1. The second screen holds all the information, it is built upon boxes with a title, whenever something new is incorporated it will be placed within here. Each box holds information that can be read without pressing into them, however information such as key safe number and double up contact information requires the box to be pressed.



Client Details

1. This contains the clients phone number once selected.

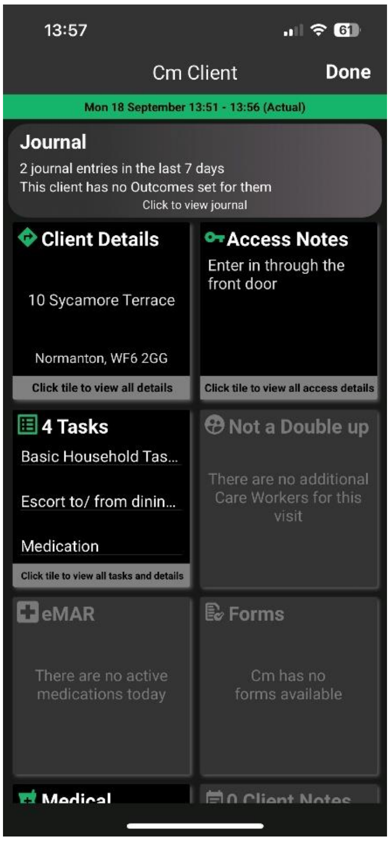
Key Safe Number

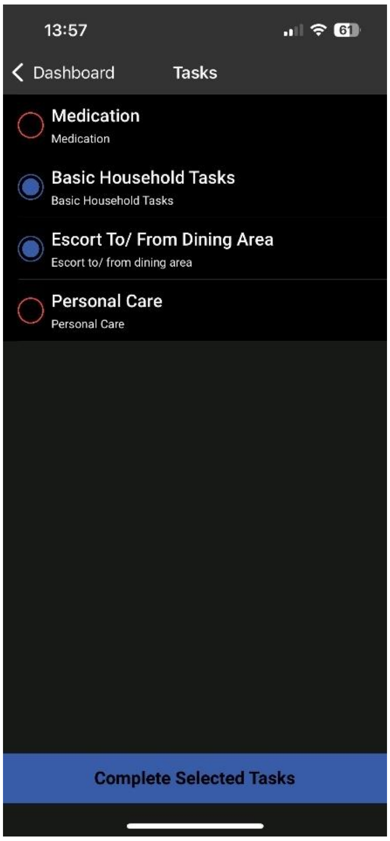
1. The key safe number is located inside of “Access Notes”. Open this box and select “Key Safe Number”.

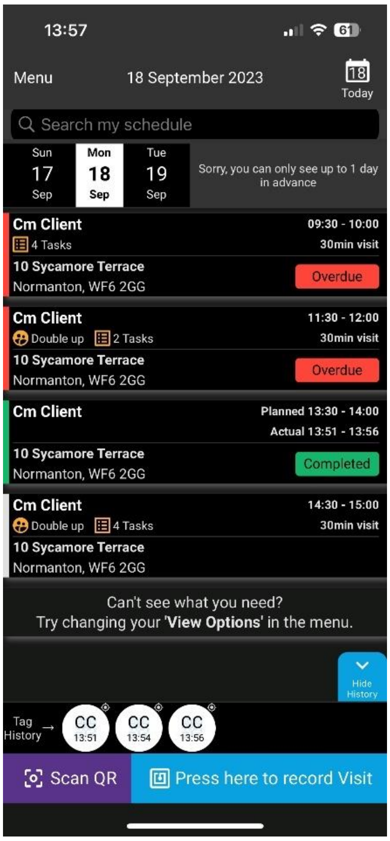
Complete Tasks

1. During your visit, you will have tasks to complete. To run through the process:
    a. Enter the property.
    b. Scan QR to say you have "**arrived**".
    c. Check tasks and conduct them.
    d. Update your journal entry, completed your client record booklet.
    e. **Scan QR** to say you have "**completed**" your visit.
    f. Once green, you now need to "**Complete**" your tasks.

2. How to complete your tasks:
    a. After step e. you now go back into your visit you have just completed.
    b. Select Tasks.
    c. You will now see checkboxes next to your tasks.
    d. Tick any you have completed or any that has been completed by someone else (just ensure you are stating who did them in your journal entry).
    e. Do not tick any that did not happen.
    f. Once ticked, select "**Complete Selected Tasks**".
    g. When the first screen is selected, it will remove all tasks notifications. This shows you that you have marked off the tasks appropriately Please note: If your mis tick, once you complete selected tasks you cannot change it from here. Please put a journal entry.







Client Contacts

1. This is for additional contact information for any other parties involved with the client.

Client Notes/ Planned Visit Note

1. This is used by the office staff for information that is important for you to know before your visit.

Journal Section

Purpose of this section

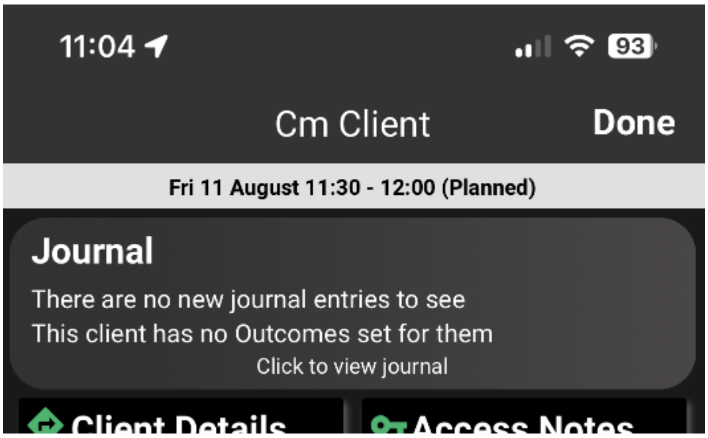
1. The journal (found in CM Mobile) is the only location where information can be written and updated. This will be the visit log/ client feedback/ outcome progression notes.

2. This section corresponds to both practitioner/ co-ordinators and Support Assistants. It is good as a practitioner/ co-ordinator to understand how it works on the Mobile version as you will be able to assist and have the knowledge of what they are required to do.

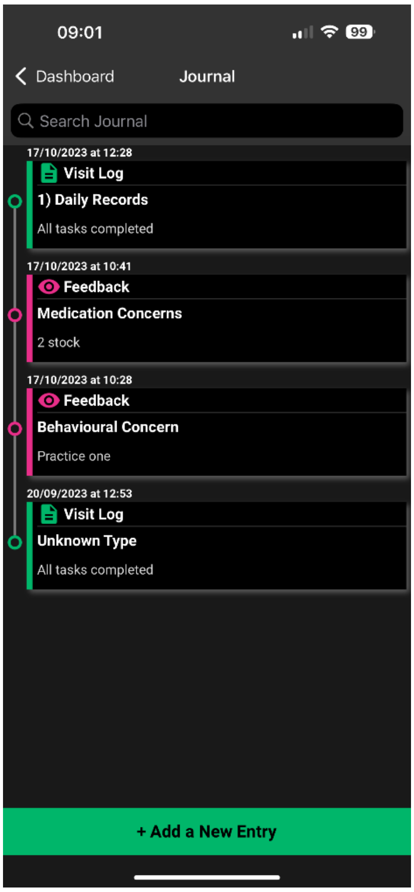
3. This section focuses how to enter the information on both the Mobile version as well as the portal version of CM.

How to find and use the Journal Entry (CM Mobile)

1. Select “**Journal**”.

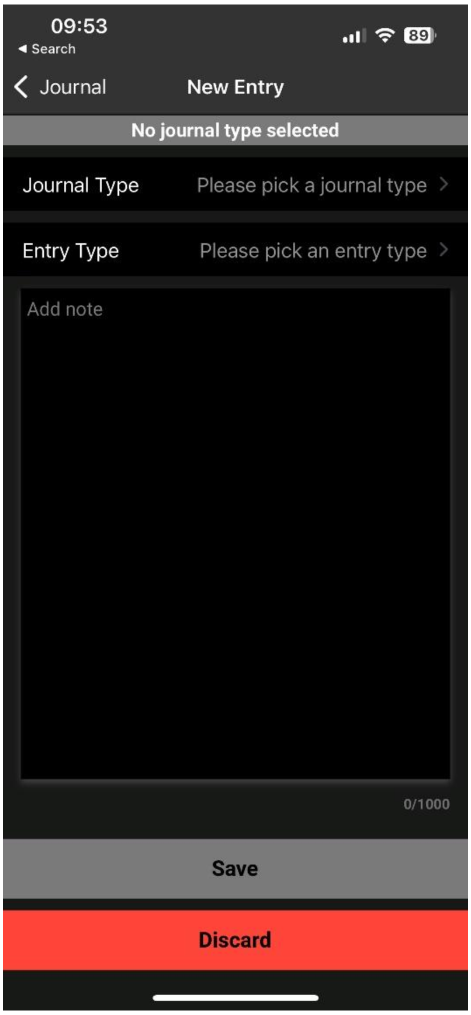


2. When selected, you will see previous entries by other carers. Feel free to read through those.



3. To add a new entry, select "**Add a New Entry**" at the bottom of the screen.

4. When selected it will open another screen asking what it is you want to enter. The top being the type of entry (Visit Log/ Client Feedback/ Outcome Progression Notes) you wish to enter via "**Journal Type**". The "**Entry Type**" are the pre-designated choices that can be selected depending on which Journal Type has been entered.



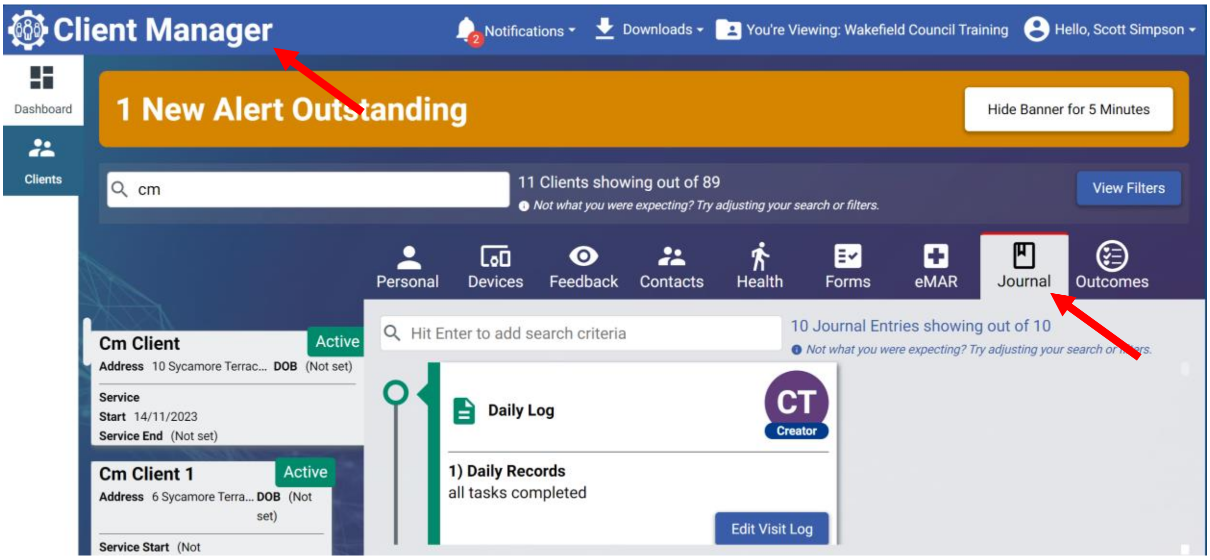
5. Once the journal type and entry type have been chosen, continue to record the information in the box marked "**Add Note**" and then select "**Save**".

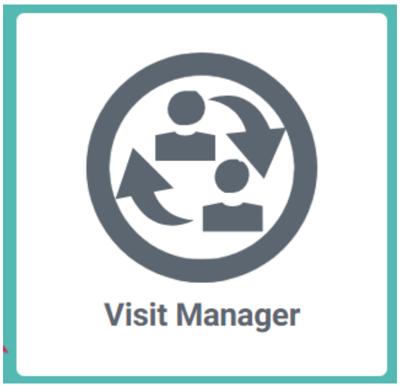
Visit Log

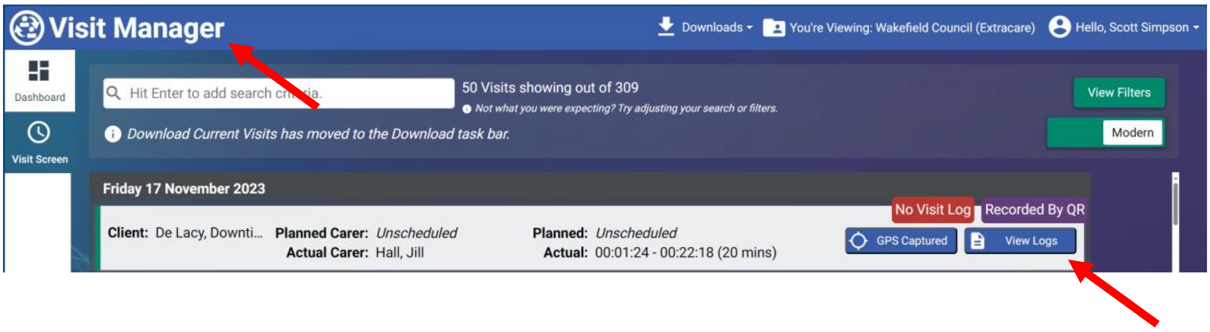
1. When you have chosen the **Visit Log** journal type, the “**Entry Type**” will give you two options:

Option	Reason
Declined Visit	Please select if someone has declined visit or cancelled at the point of entry. Do not worry about scanning QR code.
Buzz Call	If someone has a fall, or an emergency of any regard you can record what happened and why you were there. (Login and out via QR Code. Then select buzz call dropdown in the visit log. Record the details of the reason for the buzz call and action taken).

2. Updates to the visit log section can be viewed by practitioner/ co-ordinators and co-ordinators via the visit manger/ client manager section of the portal.







3. You will not be automatically notified of any new entries.

Client Feedback

1. When you have chosen the "**Client Feedback**" journal entry, the "**Entry Type**" will give you 10 different options:

Option	Reason
Accident, Incidents and Near Misses	If an accident occurs, then you can log it here.
Behavioural Concern	If there is a behavioural concern either with the client or in the vicinity of the client.
Complaints and Compliments	If the client has any.
Dietary Concern	If there are issues with foods or diet.
Environmental Concern	If the surrounding area or internal environment is a concern.
Medication Concerns	If there are medication concerns
Mobility Concerns	If there are signs of mobility issues
Safeguarding Concern	If there are signs of safeguarding issues.
Unable to Gain Entry	If you are unable to enter a property for whatever reason.
Request change to visit times	A request to change visit times. Not always can we accommodate however it is an opportunity to request changes.

2. Support assistants will use the client feedback section to record and raise concerns about individuals.

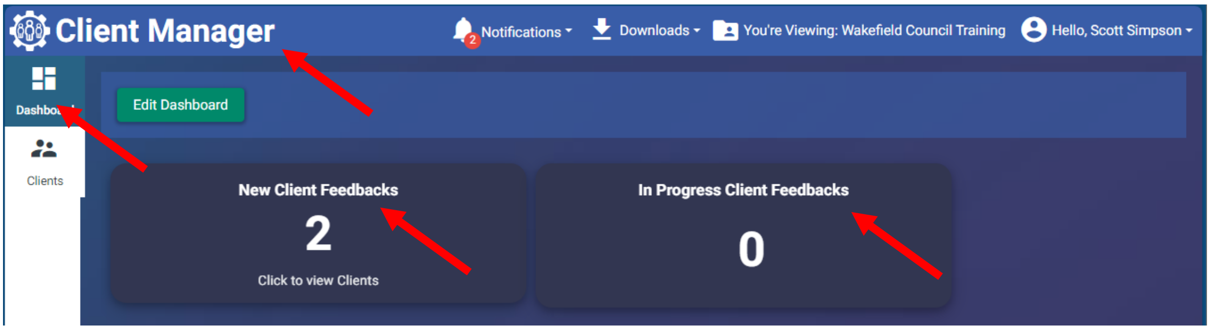
3. Concerns are categorised into themes.

4. Information added in this section via CM Mobile will be sent to a group dashboard on Client Manager under "**Client Manager**". Therefore, you will be notified when client feedback is recorded.

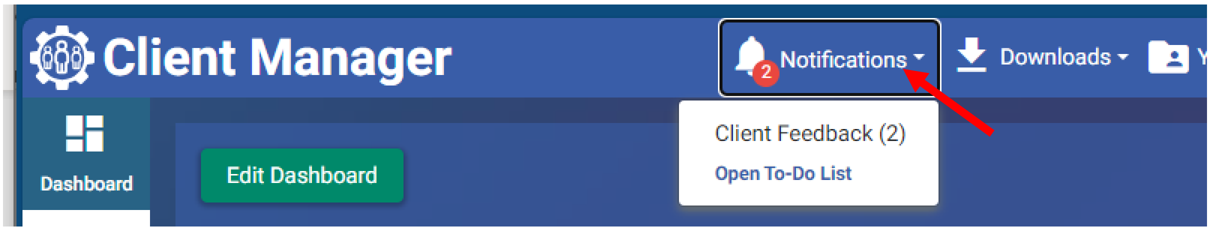
5. It is everyone's responsibility to check the dashboard and monitor what is happening (to check who is being assigned to what, just in case that person is off work).

6. Members of the group will:
    a. Check new notifications via the dashboard.
    b. Review concerns/ feedback and act.
    c. Record action taken/ assign to other people.
    d. 'Resolve' the concern in the system when actions are completed.
    e. View concerns being actioned by others.
    f. Monitor to ensure actions are completed in a timely manner.

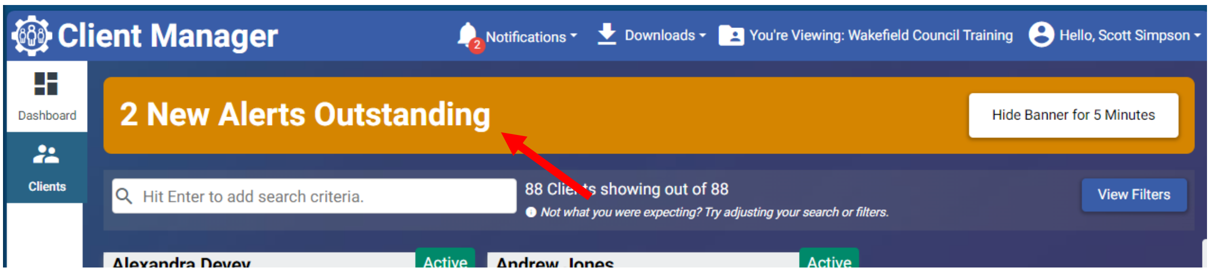
7. When a client feedback entry is created by the support assistants, the **client manager** section notifies you. When **Client Manager** is opened, you will be met with a dashboard. One of the two places it notifies you is "**New Clients Feedback**" and "**In Progress Client Feedback**".
    a. New Client feedback will show unassigned client feedback entries.
    b. In progress will show any client feedback entries that have been assigned to you.



8. Another place, it will notify will be on the **Notifications** tab.

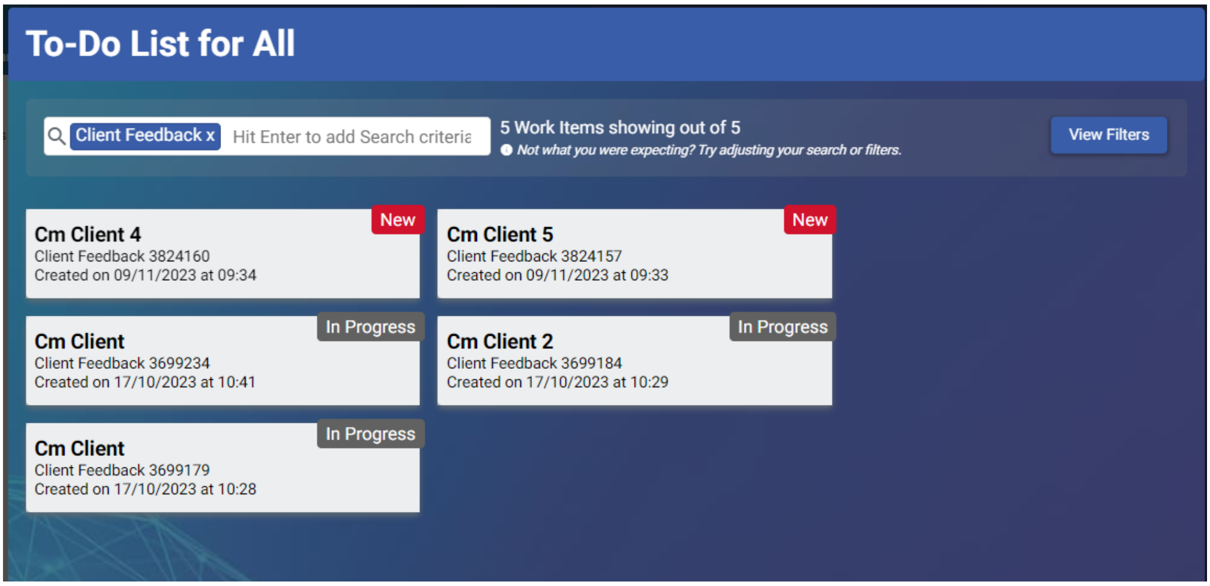


9. The final place it will notify you will be as an orange banner on the **Client Manager** page.

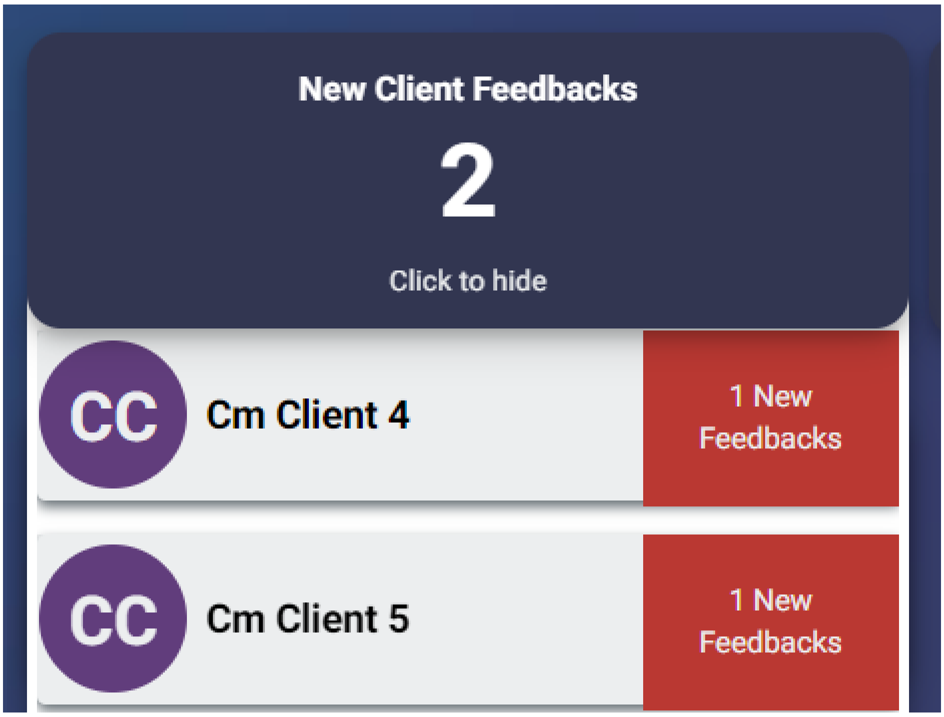


10. It is hard to miss when a client feedback entry is made towards a particular client. Client feedback is to notify you that you may need to do something to assist or for your awareness.

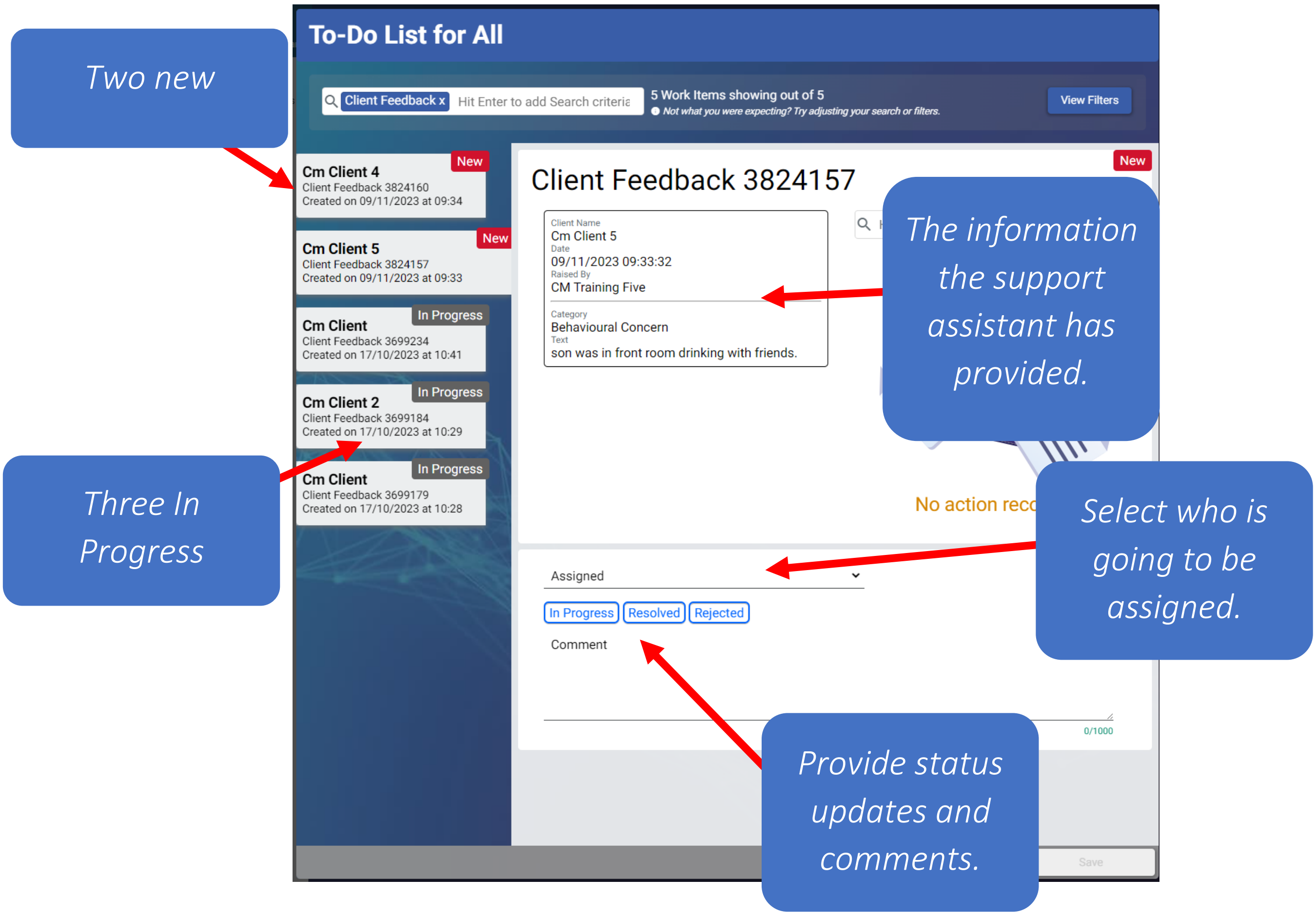
11. When you receive an alert, select it from **Notifications** or **Clients** – they both will look the same.



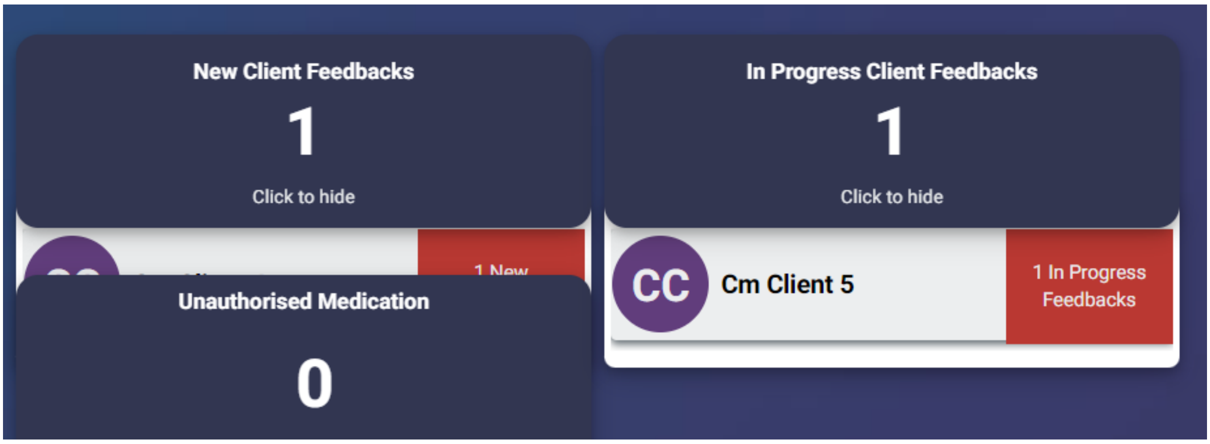
12. However, the **Dashboard** will look different. As when selected, it will filter it down to that client and not show anyone else like the other two options do.



13. On the To-Do List for All screen it showcasing how many new and in progress client feedback, what is the concern that has been raised by the support assistant, who is going to be or who is assigned, the status of the raised concern including any comments.
    a. **In progress** will show that the action has been assigned and is currently being worked upon.
    b. **Resolved** will show the concern/ feedback has been completed.
    c. **Rejected** is not used.



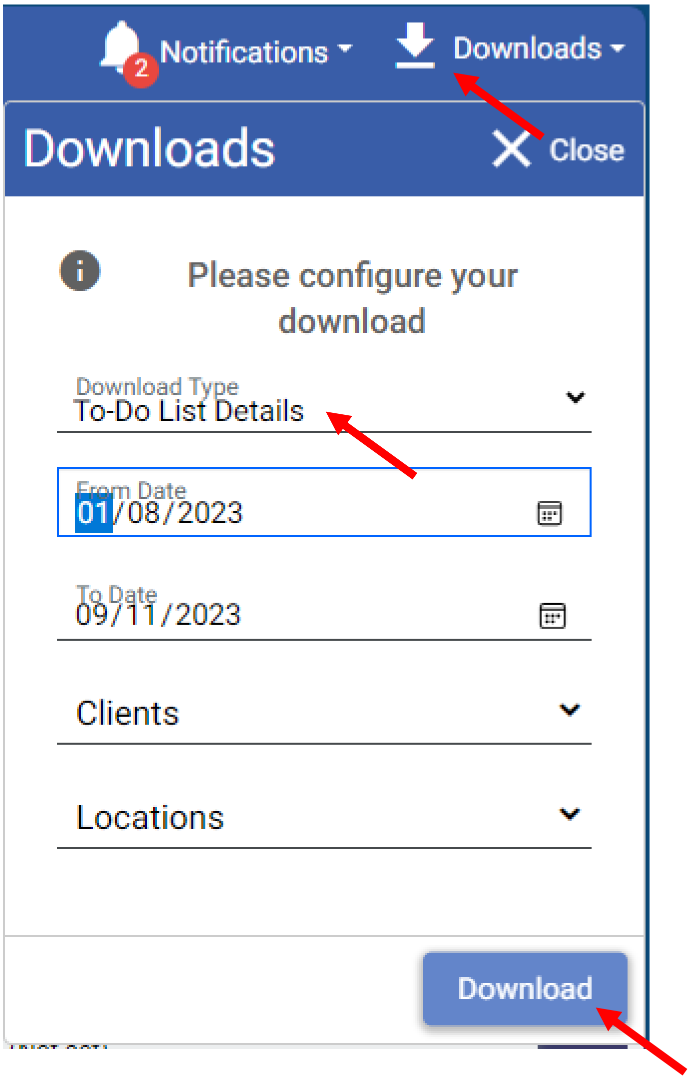
14. If left as “In Progress” this will now appear on your **dashboard** (if you have included the boxes on the **edit dashboard** screen). If **resolved** it will disappear.



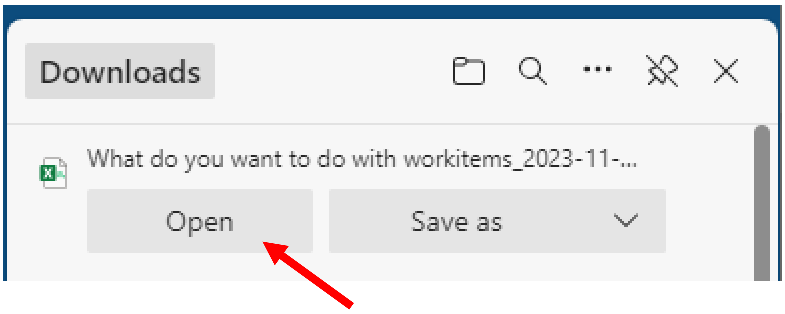
Current workloads of assigned client feedback

1. Checking people's workload is important. However, when client feedback grows to numbers of 30+ it gets difficult to see who is assigned what as you must individually click on each one to find out who it is assigned too.

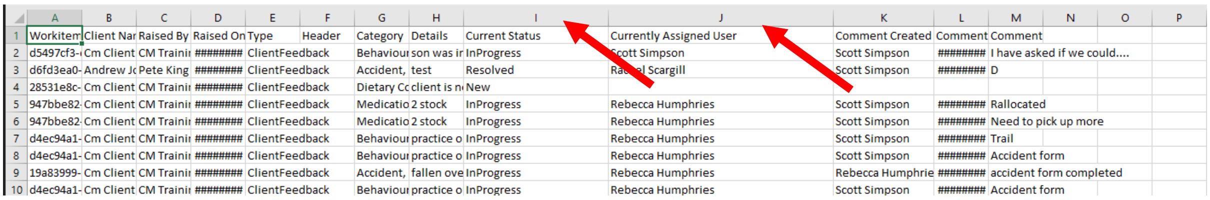
2. Select **Downloads** and choose **To-Do List Details** and the time frame you want to look at. You can also include individual clients or locations. Then **Download.**



3. This will then download the list of practitioner/ co-ordinators/ co-ordinators assigned client feedback and what they have been assigned. Select **Open**.

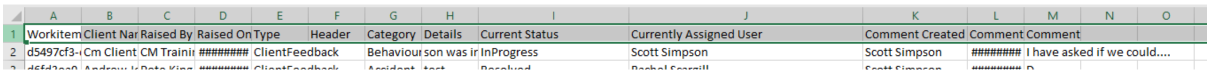


4. This will provide you with an excel spreadsheet with all current assigned client feedback. Increase the size of I and J column.



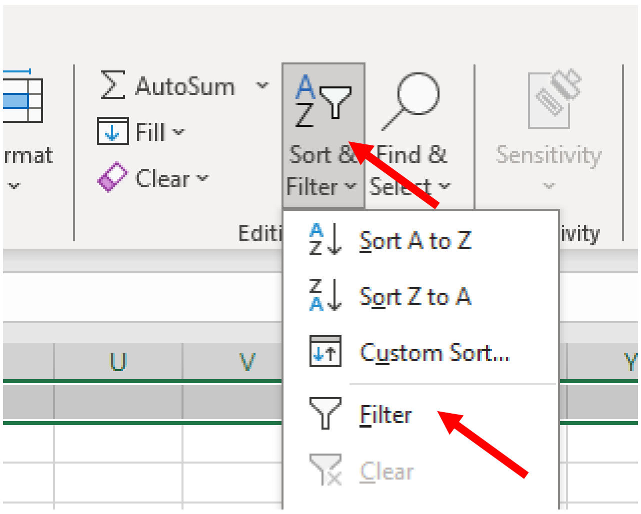
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Workitem	Client Nar	Raised By	Raised On	Type	Header	Category	Details	Current Status	Currently Assigned User	Comment Created	Comment	Comment			
2	d5497cf3-(	Cm Client	CM Trainii	#########	ClientFeedback		Behaviour	son was ir	InProgress	Scott Simpson	Scott Simpson	#########	I have asked if we could....			
3	d6fd3ea0-	Andrew Jc	Pete King	#########	ClientFeedback		Accident,	test	Resolved	Ra[illegible]el Scargill	Scott Simpson	#########	D			
4	28531e8c-	Cm Client	CM Trainii	#########	ClientFeedback		Dietary Cc	client is n	New							
5	947bbe82-	Cm Client	CM Trainii	#########	ClientFeedback		Medicatio	2 stock	InProgress	Rebecca Humphries	Scott Simpson	#########	Rallocated			
6	947bbe82-	Cm Client	CM Trainii	#########	ClientFeedback		Medicatio	2 stock	InProgress	Rebecca Humphries	Scott Simpson	#########	Need to pick up more			
7	d4ec94a1-	Cm Client	CM Trainii	#########	ClientFeedback		Behaviour	practice o	InProgress	Rebecca Humphries	Scott Simpson	#########	Trail			
8	d4ec94a1-	Cm Client	CM Trainii	#########	ClientFeedback		Behaviour	practice o	InProgress	Rebecca Humphries	Scott Simpson	#########	Accident form			
9	19a83999-	Cm Client	CM Trainii	#########	ClientFeedback		Accident,	fallen ove	InProgress	Rebecca Humphries	Rebecca Humphrie	#########	accident form completed			
10	d4ec94a1-	Cm Client	CM Trainii	#########	ClientFeedback		Behaviour	practice o	InProgress	Rebecca Humphries	Scott Simpson	#########	Accident form			

5. Highlight the 1st row. By selecting number 1 on the left-hand side.

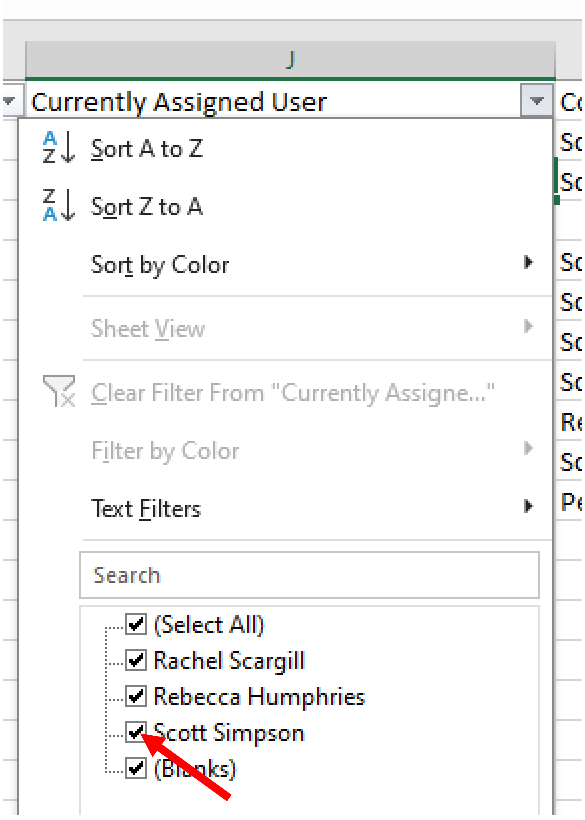


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Workitem	Client Nar	Raised By	Raised On	Type	Header	Category	Details	Current Status	Currently Assigned User	Comment Created	Comment	Comment		
2	d5497cf3-(	Cm Client	CM Trainii	#########	ClientFeedback		Behaviour	son was ir	InProgress	Scott Simpson	Scott Simpson	#########	I have asked if we could....		

6. Then go to “Filter”. Under “home”, “editing”, “sort & filter”, “filter”. This will ensure the headers are now filterable to find all under a certain Support Assistant.



7. Press on the arrow now shown on column J and you can untick or tick the right people's workload.



8. This is useful for when you need to see what someone's workload in case they are on annual leave or are off work. That way you can go back into **Client Manager** and reassign this workload on to other practitioner/ co-ordinators/ co-ordinators.

Outcome Progression Note

1. When you have chosen the **Outcome Progression Note** journal entry, the **Entry Type** the support assistant will be see all available goals/ outcomes that the practitioner/ co-ordinator has added to the client. This is how we add updates to that outcome/ goal to show progression at regular intervals including any additional notes that occur during the visit. Highlighting, when independent milestones and positive progression have been achieved. Please ensure this section is completed after every visit.

2. The goals/ outcomes will be based around the PSP of the client. What are they trying to achieve? What are they trying to maintain? This PSP section should be replicated into the **outcome progression notes** area. That way, the support assistants can add notes towards the goals/ outcomes the client wants to achieve.

3. This will replace the **paper goal sheets** and **daily record sheets.**

4. The practitioner/ co-ordinator will set the goals for individuals for each relevant area of care & support to achieve desired outcomes.

5. Practitioners/ co-ordinators will select the relevant description in the system.

6. Support assistant will record updates against each goal at each visit.

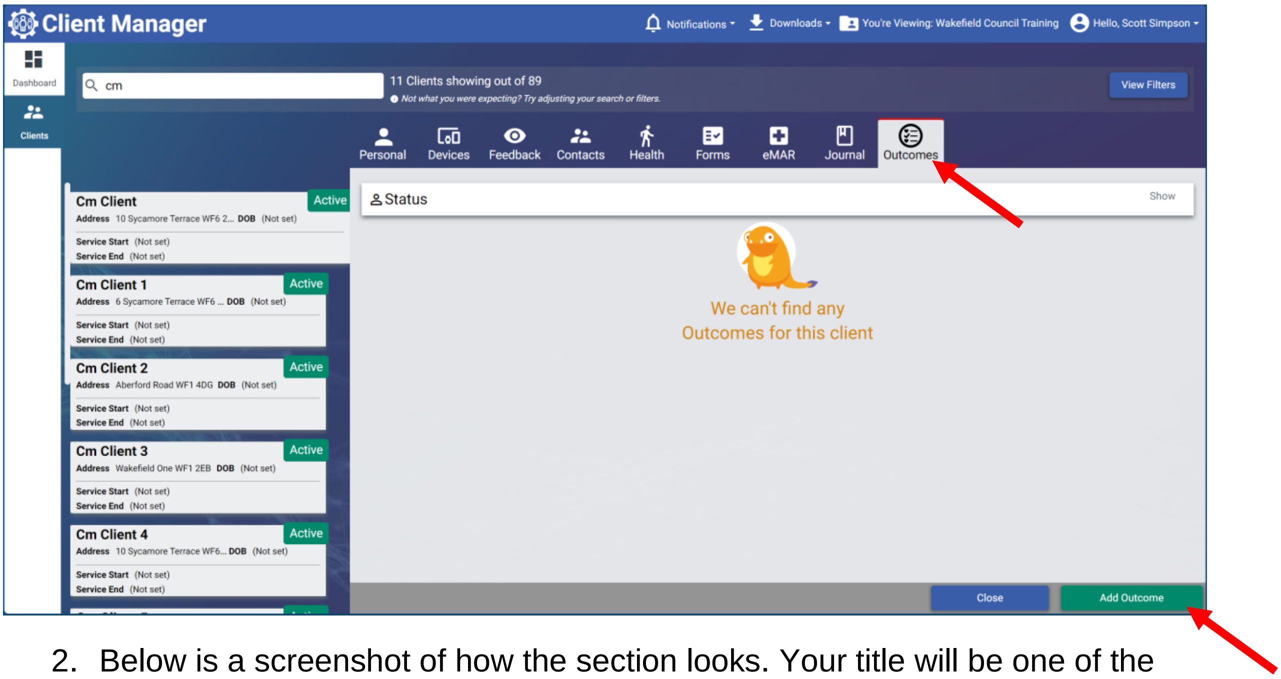
7. Within extra care, the goal may not always be to regain ability to optimise etc, instead it might be to maintain current ability and avoid client regressing. Be aware that outcomes are placed to showcase what their current level is, and that we want to maintain that level of ability. As well as there could also be goals that are further set such as regain ability or optimise.

8. Support Assistants can view previous notes made by colleagues on CM Mobile.

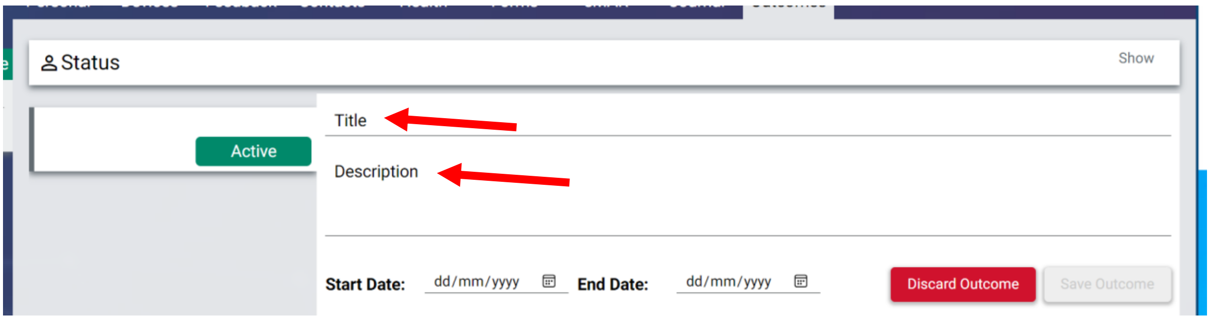
9. Practitioners/ Co-ordinators can see the progression notes via the **Client Manager.**

Adding Client Outcomes

1. To add a **Client Outcome,** Practitioners/ Co-ordinators go onto the **Client Manager** and select your client. Then select **Outcomes** and **Add Outcome.**



2. Below is a screenshot of how the section looks. Your title will be one of the choices found below. Your description will match what it says in the PSP of the in the goals and outcomes section Always also include an '**Additional Comments'** outcome with every client.



3. Please pick include as many outcomes as required according to their PSP. An example of the PSP is below. Please refer to this section of the PSP and beyond when inputting outcomes.

	My Care Needs and Goals
General Information about me	
Spiritual and Cultural Needs	
Support Networks	
Areas of care and support - Personal Cares	Washing/Bathing/Showering/Personal Grooming/Dental Hygiene Current Ability | Goals/Comments Continence Care Current Ability | Goals/Comments Dressing and Undressing

4

4. There are **areas of care and support** listed inside of the PSP. These are outcomes that require inputting onto CM. However, the titles can be confusing. Please pick from the agreed area of care and support as the title of your outcome:
    a. **Medication.**
    b. **Personal Care**
    c. **Mobility / Transfers / Escorts**
    d. **Fluid and Nutrition**
    e. **OT Visit Notes**
    f. **Downtime Therapy**
    g. **Household Tasks and Laundry (*EXTRA CARE ONLY*)**
    h. **Additional Comments (always include this one)**

5. For the description of each (apart from additional comments), it should be a condensed or a copy and paste of what is said inside of the PSP. Both "Current Ability" and "Goals/ Comments" including the additional goal specific risks/ actions needed.
    a. As an example. Here we have an PSP.

<table>
<tr>
<td>Areas of care and support - Personal Cares</td>
<td>Washing/Bathing/Showering/Personal Grooming/Dental Hygiene
<table>
<tr><th>Current Ability</th><th>Goals</th></tr>
<tr>
<td>I will require full assistance with my personal care needs.

10/01/2024
I am independent with washing my top half and below
Assistants have been supporting with washing my back, bottom and lower legs
[redacted]</td>
<td>To hopefully get my independence back once the pain to my knee subsides

10/01/2023
I want to regain full ability to be able to wash my own body, assistants to encourage and allow me time to wash independently.
[redacted]

12.1.24
Shower board been provided to support Ian to shower, only sat no standing
[redacted]</td>
</tr>
</table>
</td>
</tr>
</table>

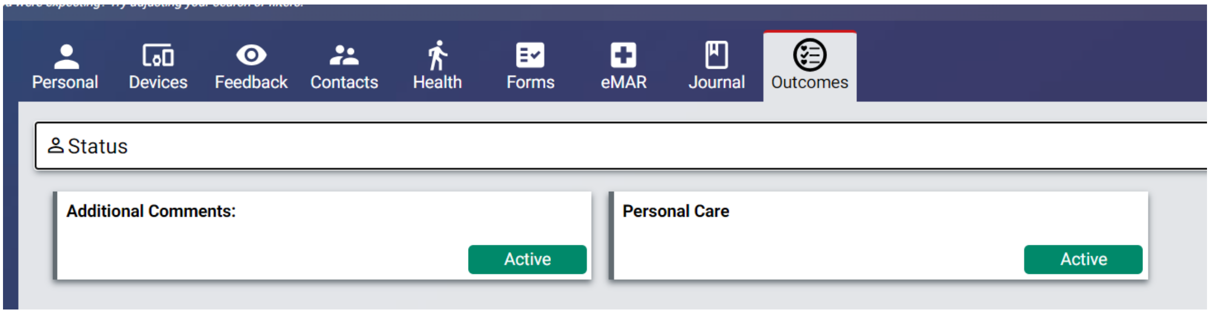
Continence Care

Current Ability	Goals
I am aware when I require the toilet but will require support to transfer on to commode with rota stand. 10/01/2024 I have progressed from requiring assistance of 2 with the rota stand to been able to stand and transfer using a Zimmer frame. Although it takes me time I can do it [redacted] 17/01/2024 I am using a urinal to pass urine, assistants have been emptying this for me. I have a glide commode which has been issued I am using this as I am unable to go into the toilet safely using my frame [redacted]	To hopefully get my independence back once the pain to my knee subsides 10/01/2024 Assistants at each visit to encourage me to use the toilet and to have a little walk and transfer around my room [redacted] 12.1.24 Issued with a glide about commode that can be used over the toilet [redacted] 17/01/2024 Assistants to continue to support with emptying my urinal and to allow me to use the toilet by placing me and the commode over the toilet, this allows me privacy when using the toilet when required [redacted]

Dressing and Undressing

Current Ability	Goals
I will require full assistance at present to dress/undress. 10/01/2024 I am independent with dressing my top half, I require support with putting my trousers/pants over my feet, I am independent with pulling my trousers up once over my feet. [redacted]	To hopefully get my independence back once the pain to my knee subsides 10/01/2024 I don't want to be reliant on long term care and in time want to regain the ability to dress independently, to do this I require support with encouragement and time to allow me to dress my lower half [redacted]

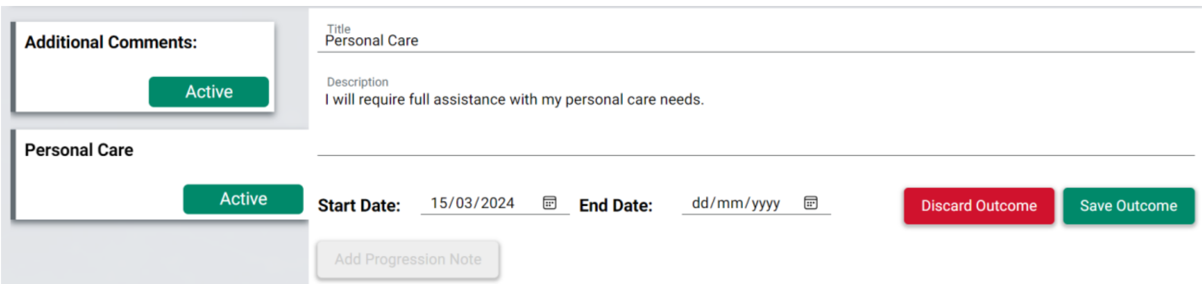
b. This is how it looks on **"Client Manager"**.



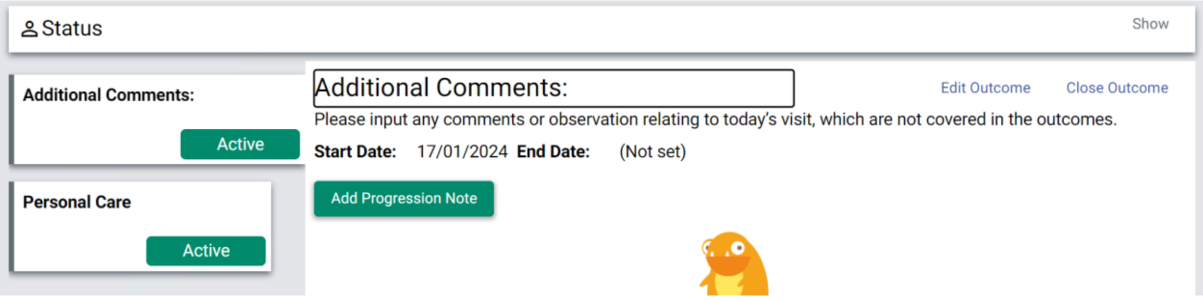
c. The practitioner/ care coordinator/ case manager has taken what was stated in the PSP under Personal Care Washing/ Bathing/ Showering/ Personal Grooming/ Hygiene.

Areas of care and support - Personal Cares	Washing/Bathing/Showering/Personal Grooming/Dental Hygiene	
	Current Ability	Goals
	I will require full assistance with my personal care needs. 10/01/2024 I am independent with washing my top half and below Assistants have been supporting with washing my back, bottom and lower legs [redacted]	To hopefully get my independence back once the pain to my knee subsides 10/01/2023 I want to regain full ability to be able to wash my own body, assistants to encourage and allow me time to wash independently. [redacted] 12.1.24 Shower board been provided to support Ian to shower, only sat no standing [redacted]

d. Changed it into Personal Care as stated with the choices of titles and condensed the information down so the support assistant is aware of the main key points and knows that they need to be aware of this during their visits.



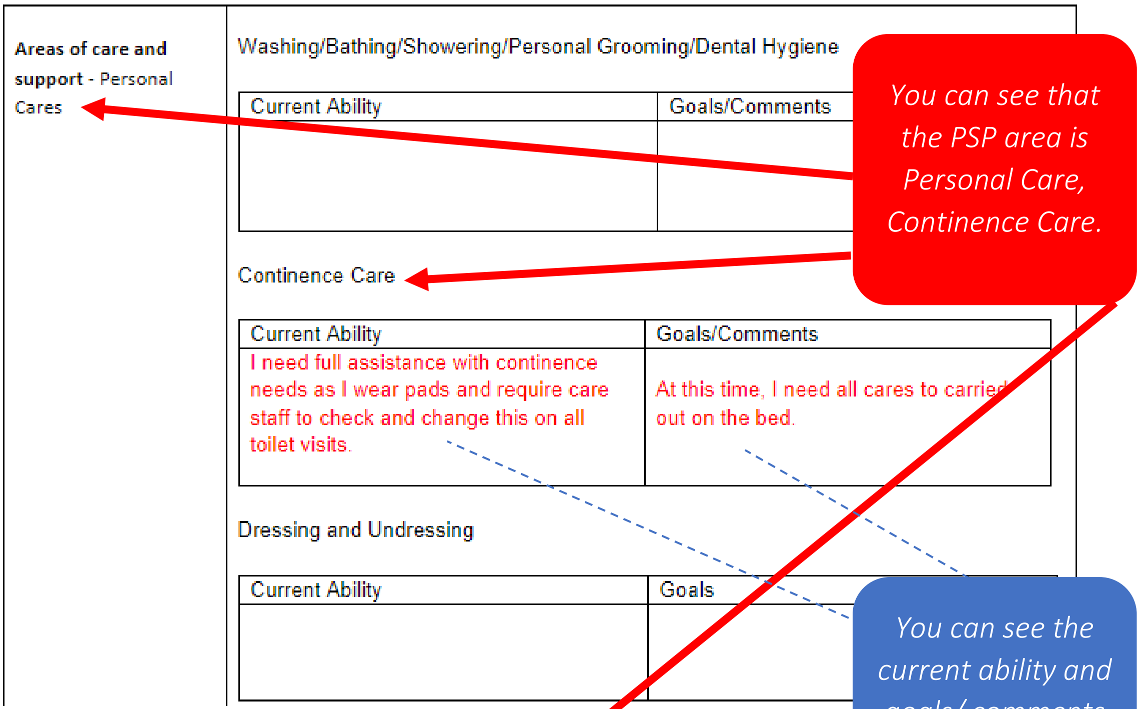
6. For **Additional Comments** please have the following: *"Please input any comments or observation relating to today's visit, which are not covered in the outcomes".*



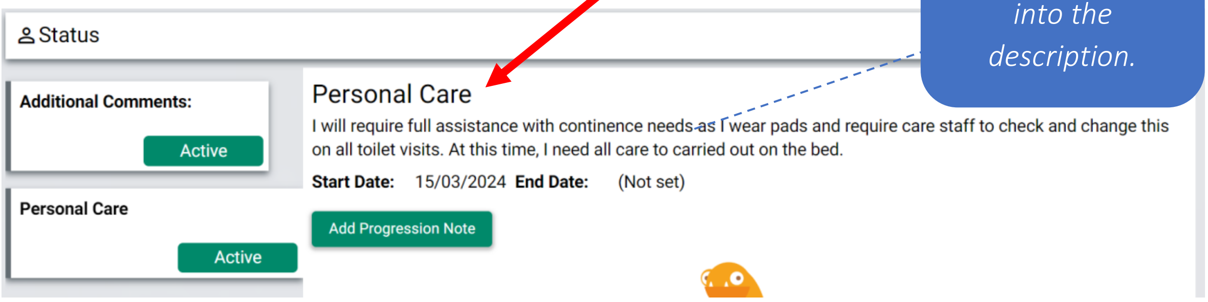
7. Select a **Start Date** and select **Save Outcome**.

Adding Client Outcome (Example)

1. I will now create one or two examples to help. If in the PSP it showed this.



2. This is how it will look inside of CM.



3. Out of the list of options for titles, the **Person Care** was chosen due to the name of the PSP section.
   a. **Medication.**
   b. **Personal Care**
   c. **Mobility / Transfers / Escorts**
   d. **Fluid and Nutrition**
   e. **OT Visit Notes**
   f. **Downtime Therapy**
   g. **Household Tasks and Laundry (*EXTRA CARE ONLY*)**
   h. **Additional Comments (always include this one)**

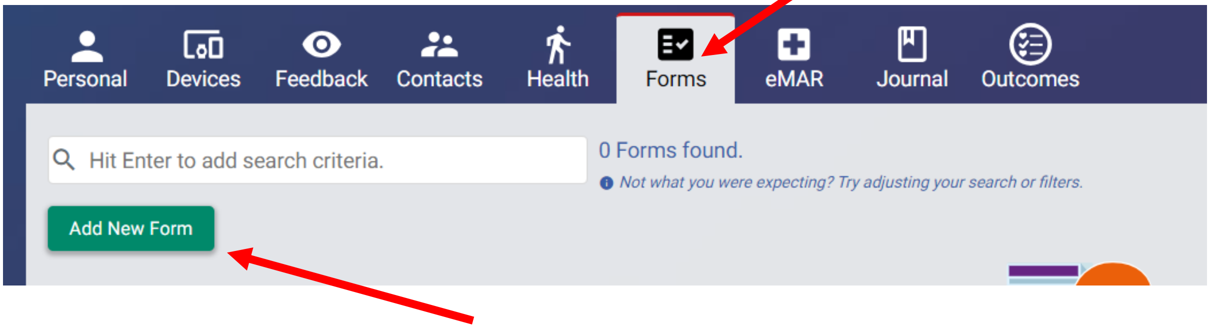
Forms

Forms have been recreated within CM Portal. Moving forward, we will use these forms and start to input information within CM Portal. This can be either done through the laptop on a visit, or through the **Chrome** app on your device. This is not a step by step on how to input the forms, but how to go through and attach forms to clients, how to print out the forms etc.

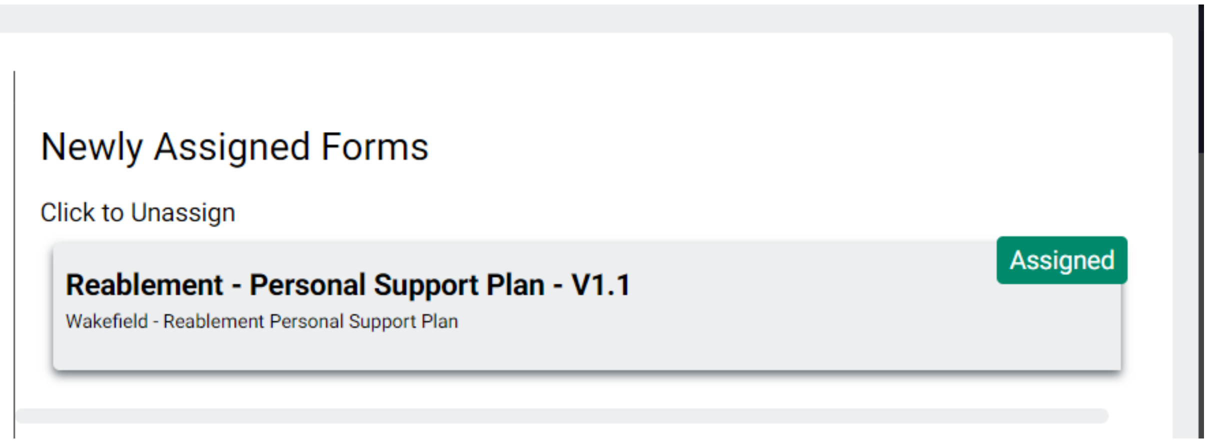
Typically, you want to tether your phone to your laptop data when complete visits. If you do not get 4G where you are, please follow the Import Form (Offline Mode) section.

Attaching a form to a client

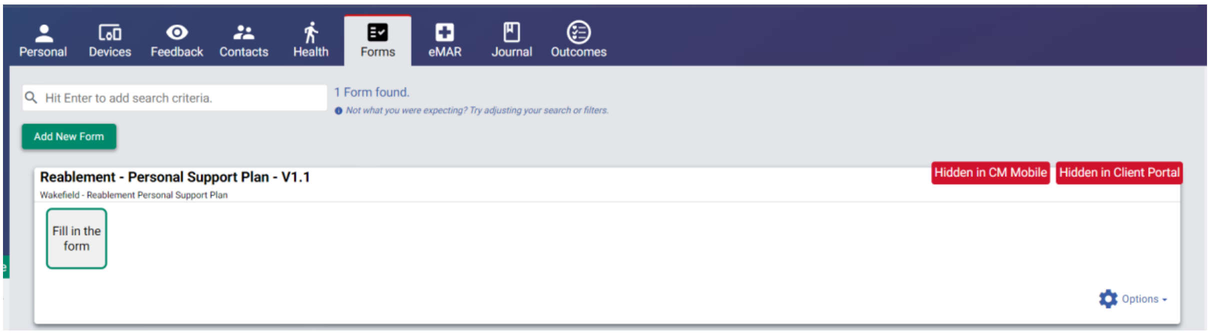
To access a form, you must attach it to a client first. This can be done within the CM Portal application. Go to **client manager** on the portal and select on the desired client. Once you've opened the desired client, go over to the **forms** tab and select **Add new form**.



On the left you will see a list of available forms to be attached. In this example, it is just the reablement PSP, for you please select whichever is relevant. When selected, it will move it to the right as **Assigned** and then you select **Next.**

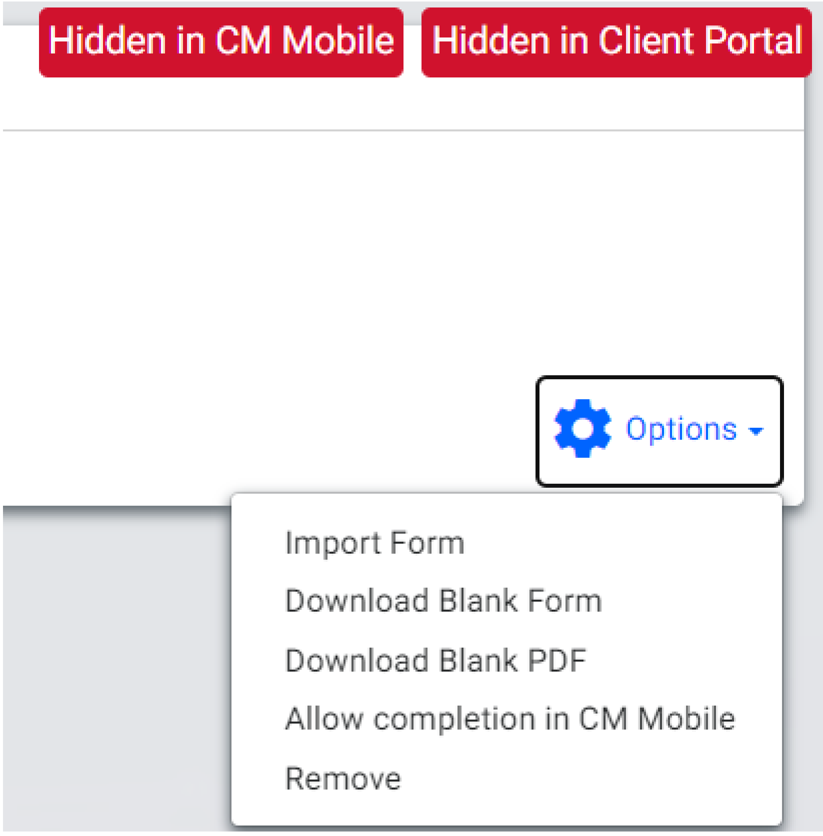


You can add multiple forms at the same time. This screen will provide you with an overview of which forms you are adding. If you are happy with your choice, select **Complete**. If not, please select **Previous** and choose another form. Once **Completed,** you will now see the forms that have been attached to the client.



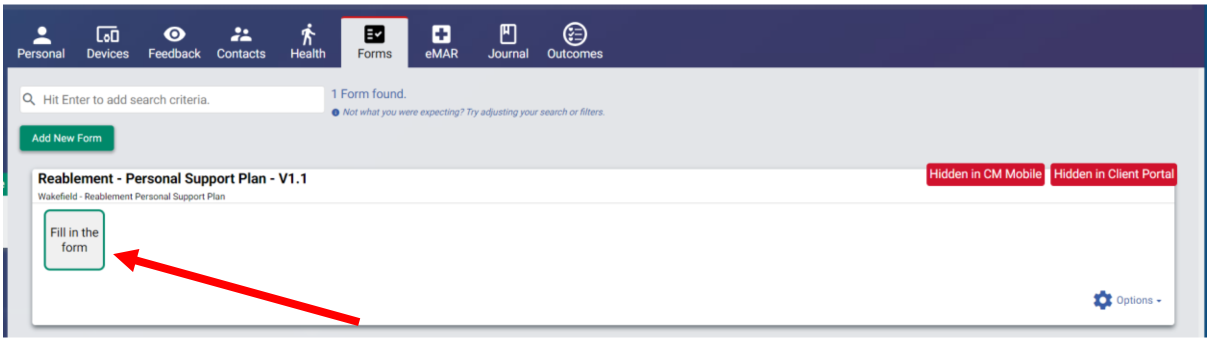
Forms Screen

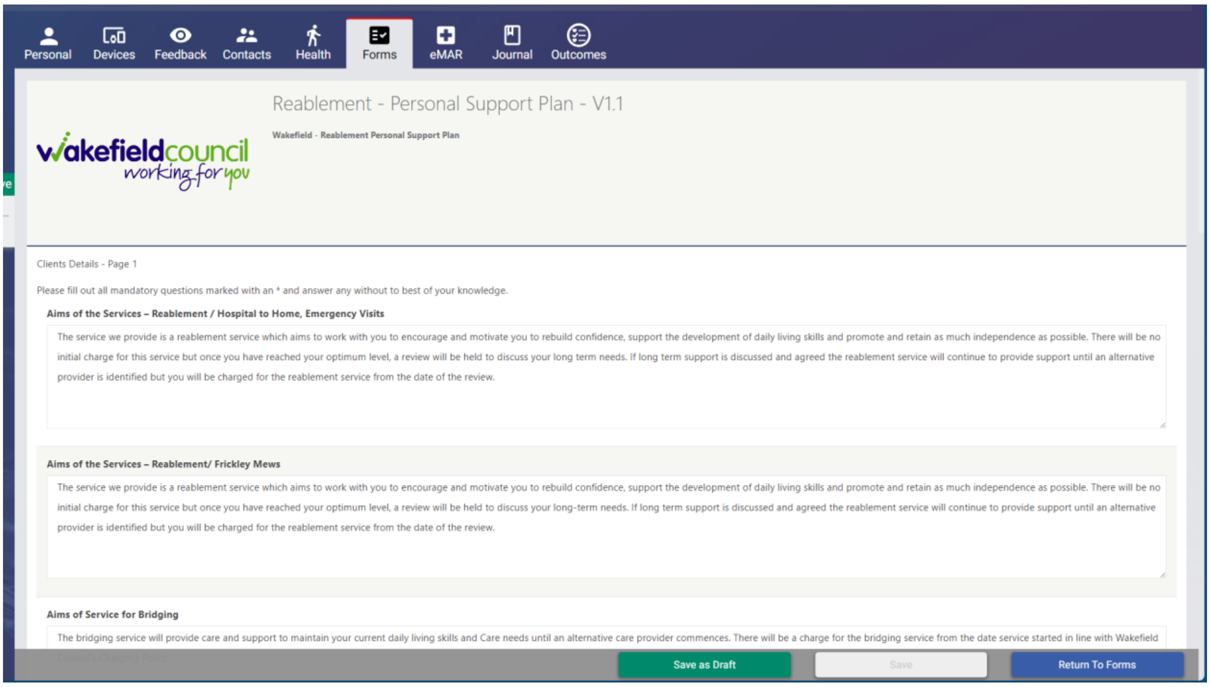
Before we will fill out the form, let me explain what you are seeing. Please be aware, if you have selected a different form than me then the only difference will be the title. On the left, you have **fill in the form**, you select this when you want to fill out the form. On the right you have, in red, **Hidden in CM Mobile, Hidden in Client Portal**. Hidden in CM Mobile means you have not shared it on the CM Mobile application for support assistants to see. Hidden in client portal, is for when we adopt the client portal into our system. Then in the bottom right you have **Options.**



Filling out a form

Now that we have attached the form to a client, we can now go ahead and fill it out on the portal. On the same screen as before, there will be a big **Fill in the form** option. Please select that, and it will pen the form inside of the forms section.

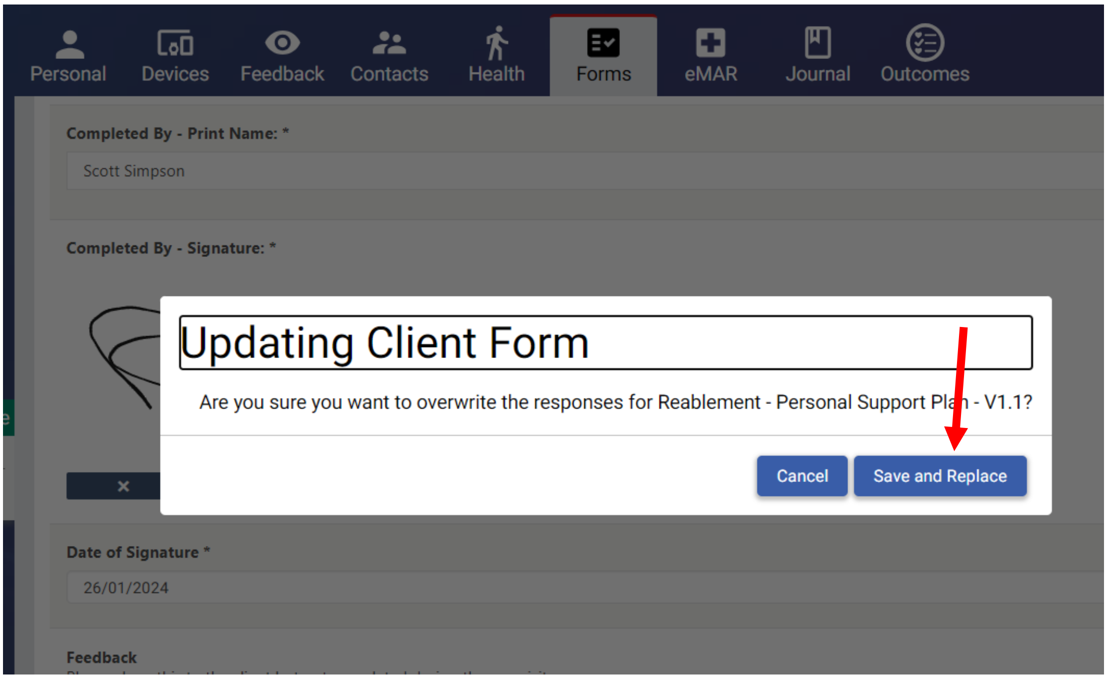




You will now need to go through the form you have selected, making sure to fill in all the mandatory fields in and reading each section as you go along. Once you have finished with a page it will allow you to move onto the next one so long as you have filled out of the sections. If you have not quite finished the form, please selected **Save As Draft** this will hold onto your progress so you can continue where you left off – it will show as a draft on the screen. Once you have completed it, press **Save.** If you need to cancel everything you have done and NOT save, please pick **Return to Forms**.

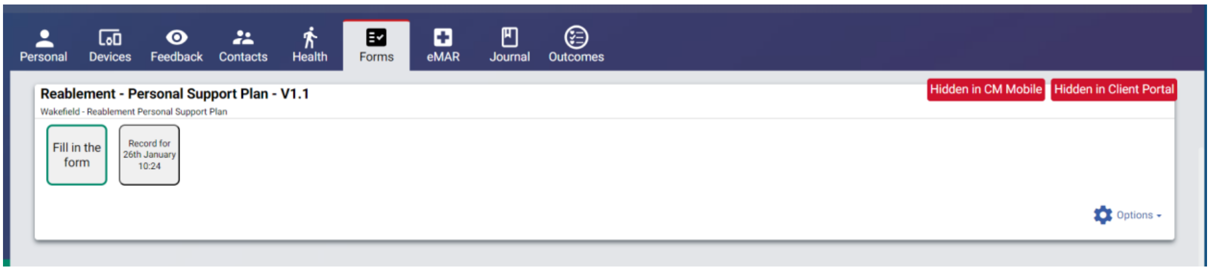
Please note: You cannot come off that forms section onto another tab like Personal, it will make you lose your progress. Nor can you duplicate tab to have another client manager running.

If you have **save as draft** when you get to the point when you need to save it, it may ask you if you are sure you want to overwrite options, and you want to select **Save and Replace.**

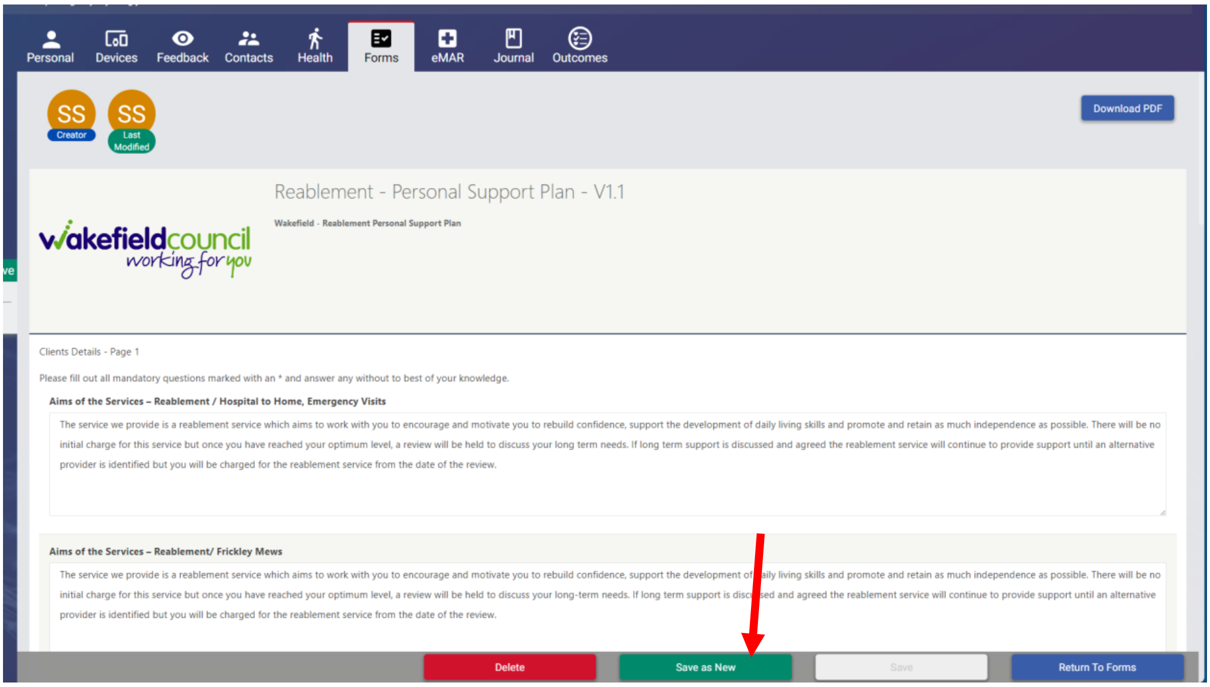


Saved Forms

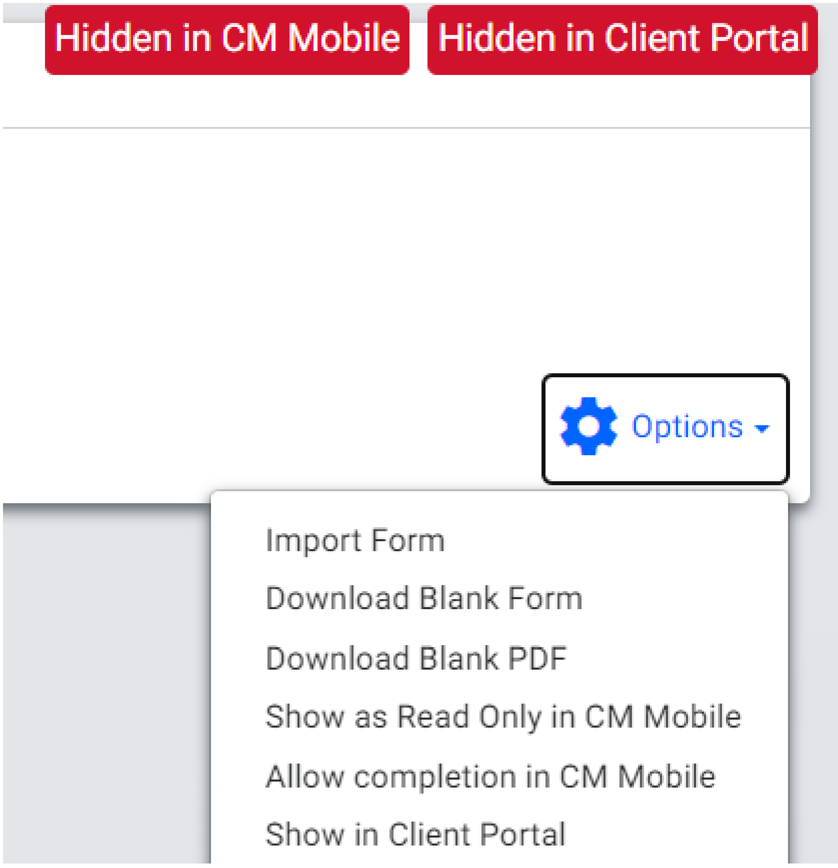
When you have saved a form, it will show the time and date you saved that form.



If we focus on that, if changes happen to that form, you can do one of two things if you need to change or create a new one. The first being you can select **Fill in the form** and create a brand-new version of the form from the beginning with none of the information saved in the previous one. When that is saved, then the most recent version you have saved will be the one people use and can see. If you want to "clone" the form so you are taking the same information as before but adapting and change onto the old version, please select the one that you last saved starting with **Record for**. This will open the old version of the form so you can go in, adapt, and change what it is you need and then select **Save as New** this will then become the new version that people will see and use.



Now that we know what we can do with saved forms and if we need to change the information or create a new version. This is what we can do with the version that we are happy with. On the screen where it shows **Hidden in CM Mobile**, select the **Options** button. The options will be different.

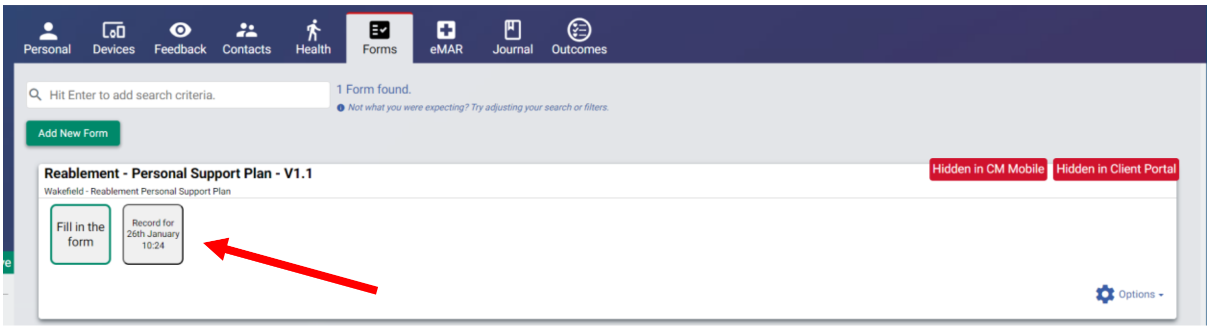


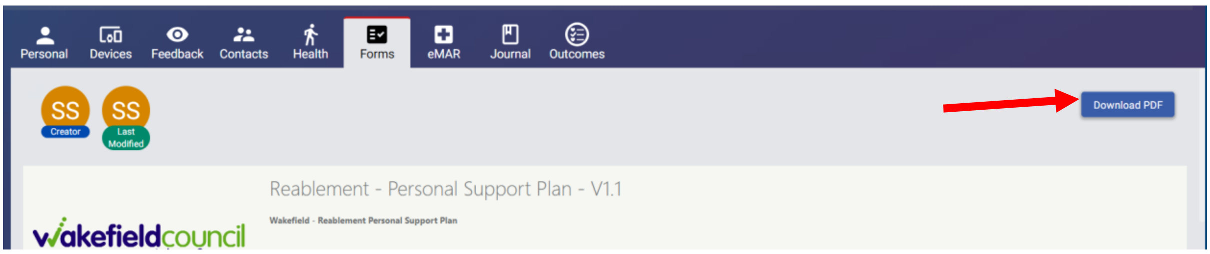
The options are shown as:

Option	**Use**
Import Form	This allows you to import a form that you have done offline. Ensure this is for the same client and the file type has been saved as a json.
Download Blank Form	This will allow offline completion as a HTML document on your web browser.
Download Blank PDF	This will allow offline completion as a PDF document on your web browser.
Show as Read Only in CM Mobile	This will show the most recent saved form to be viewable on CM Mobile for support assistants to see but not edit.
Allow Completion in CM Mobile	This will show an uncompleted version of the form on CM Mobile for the support assistants to fill out.
Show in Client Portal	This will show the most recent saved form to be viewable within the client portal so people with access can read through.

Print out the form

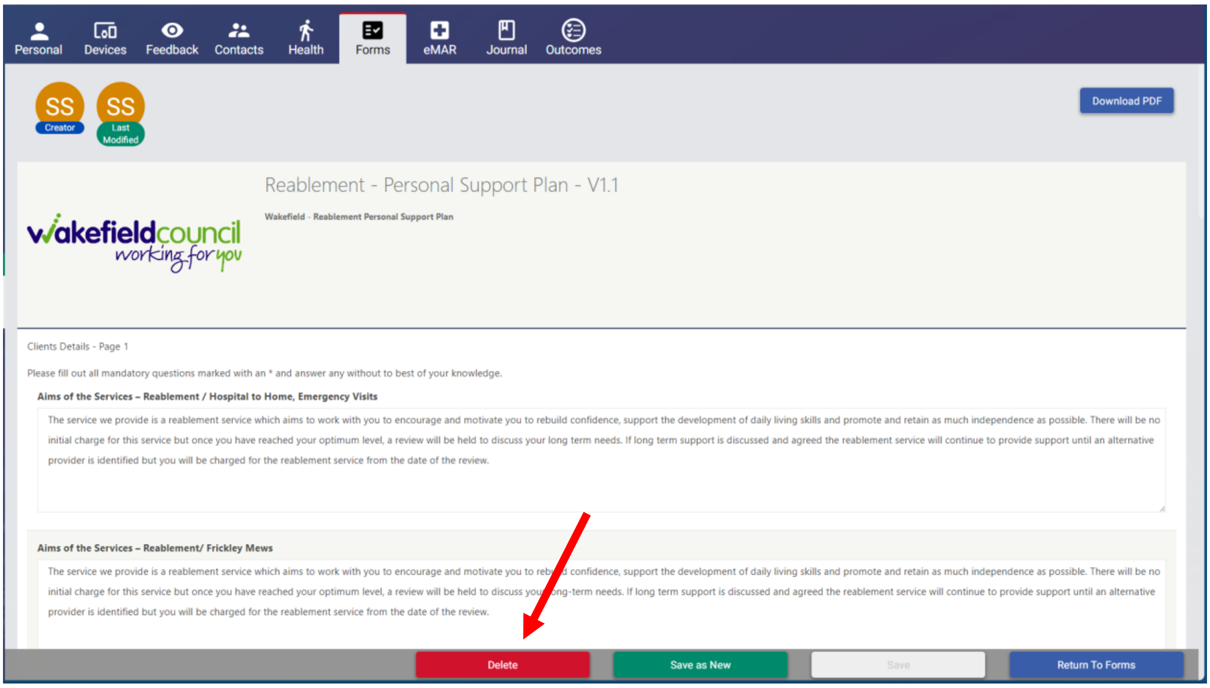
To print out the form you need to select the form from the **Forms** tab. If you select most recent saved form with the most recent date and time, this will open the form. In the top right it has **Download PDF** which will open the form as a PDF option. From here you can print, email as usual.
Please note: If you are downloading and saving forms onto your work computer please remember GDPR and data cleanse/ delete after use to ensure you are not keeping personal information on your computer beyond it's desired use.





Delete the form

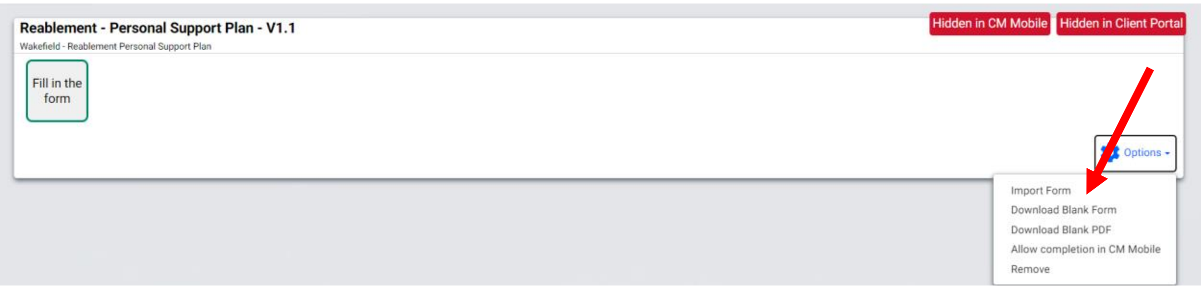
If you have attached the form by mistake, you can delete it off the record. Simply, open the form that you need deleting on the **Forms** tab of **Client Manager**. Then at the bottom of the screen, there will be a big red button saying **Delete.**



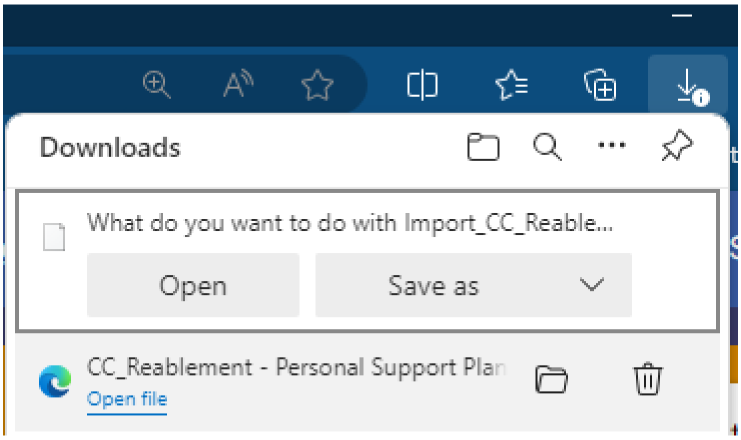
That is how you attach the form, fill it out, save, print, delete, and show inside of CM Mobile. If at any point you struggle with this, please inform adultssystemsupport@wakefield.gov.uk with the form, client and issue you are having.

Import Form (Offline Mode)

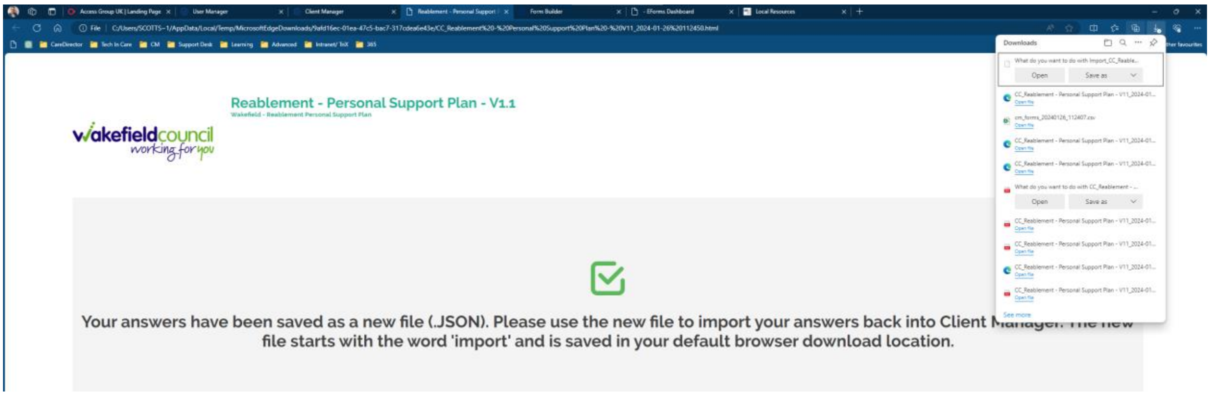
Within the options there is an **Import Form** option. The key uses of this are to be able to download the form and it out whilst being offline. For example, you can take your mobile device into a client home and use that to connect to 4G and fill out the form. However, if you want to use the laptop then you will not have connectivity unless you tether the laptop to your device. To avoid this, you create the person and attach the form and then download the form before you leave the office. That way you can fill out the form without internet connection. To download the form, under **options** select **Download Blank Form** and this will download it as a HTML form.



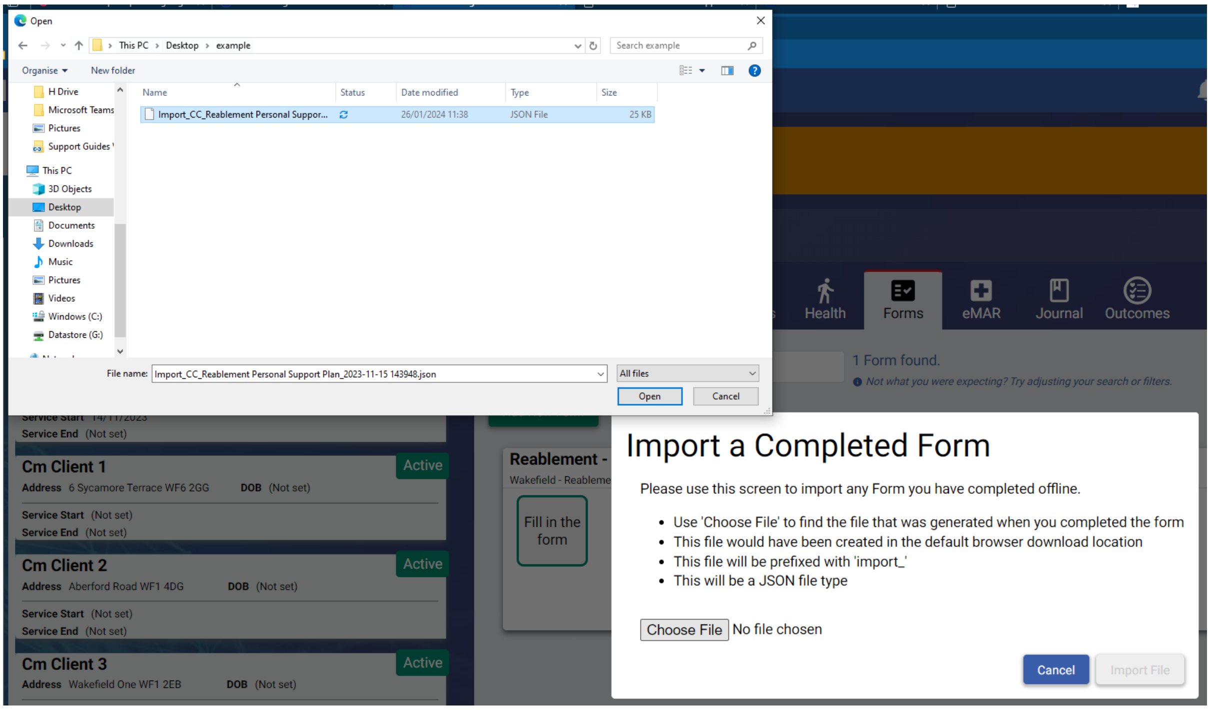
Within your downloads on Microsoft Edge, you can open this HTML file.

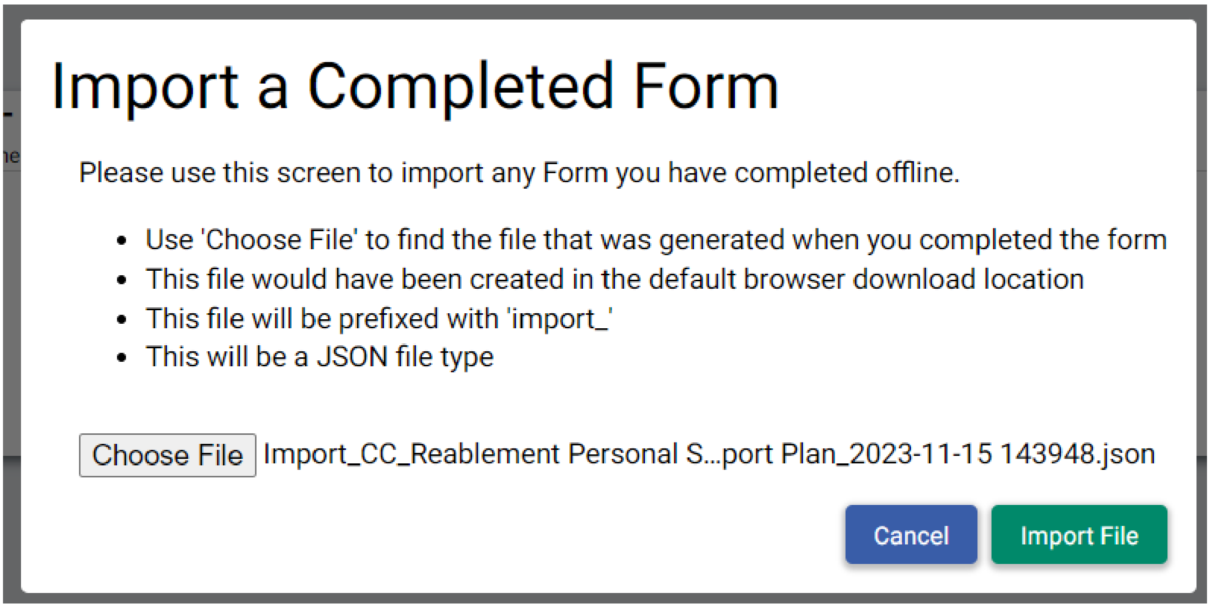


This will open it as a new Microsoft edge tab. You can fill this out offline. When you have completed the form, it will automatically download the form as a completed .json file which is required to be uploaded. Please **save as** into a safe location, so you can go back later and delete it after you upload it. Please do not rename the file.

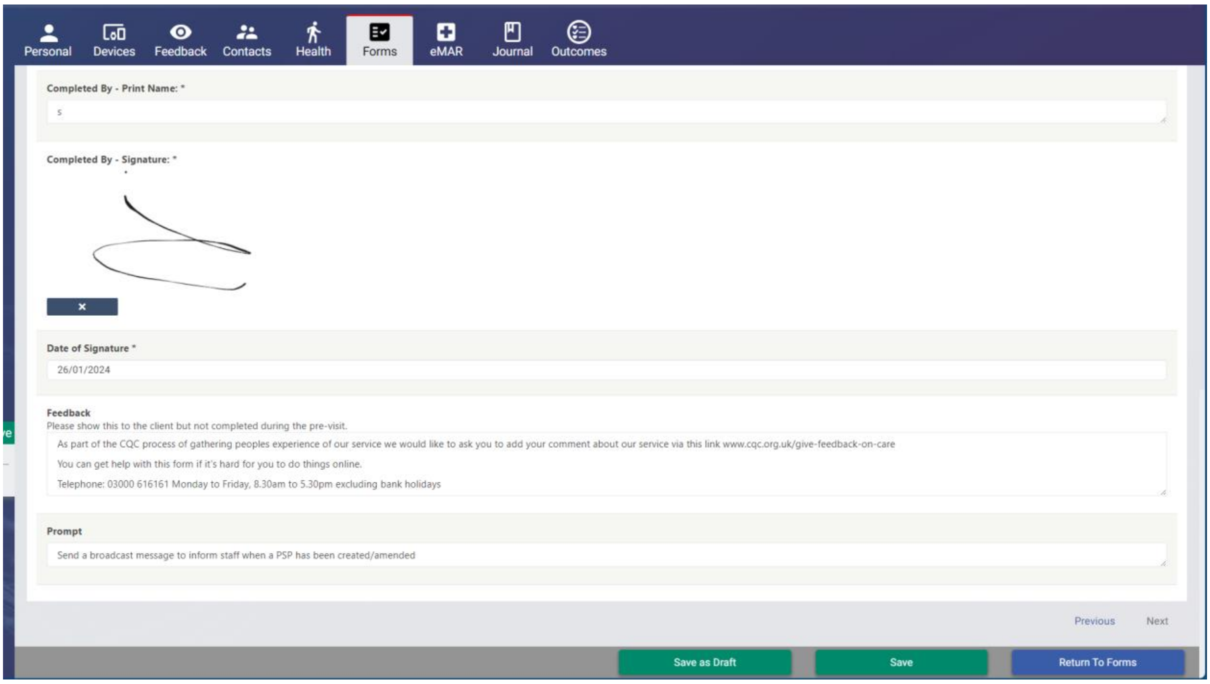


When you have saved it and connected back online. Please go to the forms tab for the client. Press **Options** and then **Import Form**. This will ask you to upload a .json file so **choose file**. Select the file where you saved it. Then **Import File.**





This will open the form inside of forms. Nothing is saved yet. You can amend where needed or save as draft. However, if you have completed the form and nothing else needs to be done – please go through to the end of form by selecting next page. Once you get to the last page, the **Save** option will become available. That way no one can amend it unless they save it as a new version.



Frequently Asked Questions

I am not getting a text message after logging in.

We must have entered in a wrong number for you. Please contact us on eForms or through email adultssystemsupport@wakefield.gov.uk with your correct phone number for us to check and change.

When I scan lunch breaks, meetings, or supervision on my device it is not completing, only creating another entry.

This is okay. Due to the fact there are multiple people attached to certain events like meetings, it may not show that entry as completed and will create a new one and leave the old one as Overdue. If this happens, please do not worry.

Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	11/07/2023
V1.1	Changes: - CM2000 is now CM. - Grammatical and readability changes.	SS	19/07/2023
V1.2	Changes: Changes to the notes section. Removed Private Set up a visit changed to setting up an unplanned visit. Added carer mismatched issues. Adding tags administration. Included an Access section	SS	18/09/2023
V1.3	Added exclusions	SS	20/09/2023
V1.4	Added panic button alerts	SS	25/09/2023
V1.5	Correct unplanned visits section. Included visits. Included events	SS	03/10/2023
V1.6	Changed to suit practitioners only. Added in how they would receive an email when first created. Added in CallConfirmLive! section separately. Added in CM Mobile section separately. Added in Portal section separately. Added copy and paste section	SS	01/11/2023
V1.7	Added Client feedback and client feedback managers section	SS	09/11/2023
V1.8	Added in a journal section. Added arrows instead of red boxes with numbers for clarity. Change “” to bold text to notify what is said in the system. Changed the name care workers to Support Assistants Change the title name to Practitioner/ Co-Ordinator’s	SS	17/11/2023
V1.9	Added another FAQ. Changed the client outcomes section. Adapted the visit logs and removed daily records sheet from there. Adapted the outcomes section and included any additional comments to explain this covers goals and daily record sheet.	SS	21/11/2023
V2.0	Changed the language for the outcome progression note section to make clearer.	SS	04/01/2024
V2.1	Added forms section.	SS	26/01/2024

	Removed a few FAQ's and put relevant ones for practitioners/ co.		
V2.2	Change outcomes options.	SS	1503/2024