



# Practitioner/ Co-ordinator V2.1

DocumentCM – Practitioner/ Co-ordinatorPurposeRole specific guide focusing on what a practitioner/ co-ordinator will do on CM.VersionV2.2OwnerICT Business Transformation Team / System Support TeamLast Updated15/03/2024



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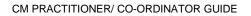
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## Purpose of the guide

- There are four separate roles on CM Scheduler (Planner), Practitioner/Coordinator, 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**

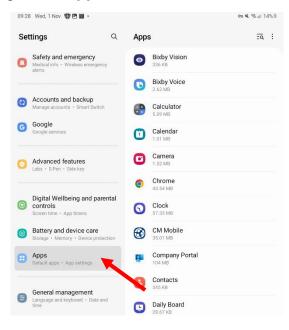
1. Please ensure you do this first as when you come to save your password for Access it will work inside of the CM Mobile application. Due to you completing pre-visits it is important that your tablet has these settings done as well.



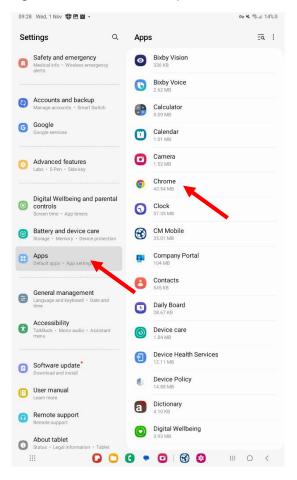
2. Open your tablet and open Settings.



3. On the left, navigate to "App".

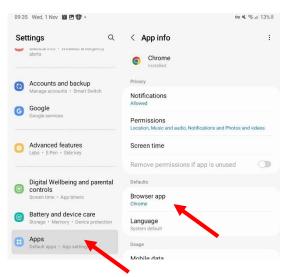


4. Then on the right go to "Chrome" and open it.

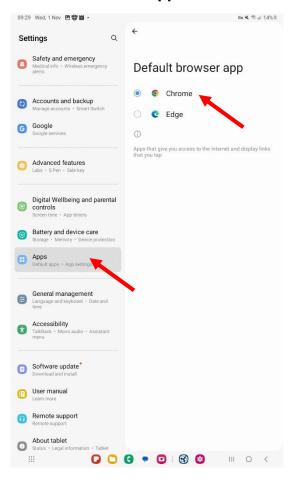




5. Once selected, it will change screen. Under "**Browser App**" it should say "Chrome".



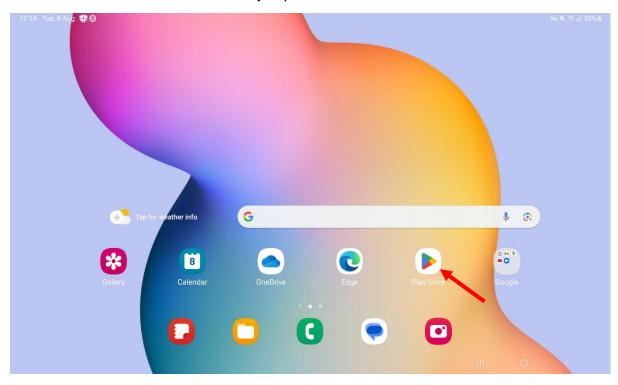
6. If it does not, then select "Browser App" and tick box the "Chrome" option.





## **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.

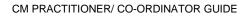




- 3. It will either say "Install" or "Open". If:
  - a. Install you need to install the app to be able to have it ready.
  - b. **Open** you already have it installed and you do not need to reinstall it.

12:15 Tue, 8 Aug 🖪 🗣			େ	¥ ⊚.⊪ 38	
÷				Q	:
	CM Mobile HAS Technology				
	Uninstall Open				
	What's new • Last updated 31 Jan 2023	$\rightarrow$			
	This version includes;				
	- Bug fixes				
	Developer contact	~			
	About this app	$\rightarrow$			
	Application for Care Workers.				
	Business				
	10K+ 3 Downloads PEGI 3 ©				
	O O O O O	111	0	<	

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

 Within your emails, you will receive an email from <u>noreply@hastl.com</u> 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.

Health, Support and Care at The Access Group Account Activation $-$ 🕲 $\sim$	Q ~
N noreply@hastl.com To: You	デ 低 ご … Fri 04/08/2023 14:13
access Health and Local Government	
Welcome to Health, Support and Care at The Access Group.	
You're receiving this email because an account has been created with your email address. To activate your account, please click the link below.	
Click Here To Activate Your Account	
The Access Group is one of the largest UK-headquartered providers of business management software to small and mid-sized organisations in the UK, Ireland and Asia Pacific. It helps fore than 75,000 customers across commercial and non-profit sectors become more productive and efficient. Its innovative Access Workspace cloud solutions transform the way business software is used, giving every employee the freedom to do more of what's important to them. Founded in 1991, The Access Group employs approximately 6,300 people. <u>www.theaccessgooup.com</u>	
← Reply → Forward	

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**.

Activate your account	I.
Please enter your password	Ø
Please confirm your password	8
Return to login	Activate Account
Password Tips	
Secure password tips:	
<ul> <li>Do not use the same password you have use</li> <li>Do not use your name, e-mail address, mobil personal information that can be easily obta</li> <li>Do not use the same password for multiple of the sam</li></ul>	e phone number or other ined.

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



Activate your account	ſ	
Please enter your password	Ø	Your password needs to adhere to the following rules:
Please confirm your password	<b>X</b> This field is required.	<ul> <li>✓ Minimum of To characters.</li> <li>✓ Contain at least 1 upper case letter.</li> <li>✓ Contain at least 1 lower case letter.</li> <li>✓ Contain at least 1 number.</li> </ul>
Return to login	Activate Account	<ul> <li>Contain at least 1 special character.</li> <li>Contain less than 4 repeatable characters.</li> </ul>

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

noreply@hastl.com To: You	← ≪ → … Fri 04/08/2023 14:14
access Health and Local Government	
Hello CM Training	
Welcome to Health, Support and Care at The Access Group.	
You can now login using your account on our <u>Access Group login page</u>	
We are delighted that you have chosen to join the thousands of satisfied customers already using our care management solutions to give you the freedom to do more.	
At The Access Group, we offer a unique joined up ecosystem of solutions across the health, local government, and the social care spectrum resulting in more person-centred care and better outcomes to add value to your business in terms of quality of service and cost efficiencies. Some additional benefits also include:	
Regular system upgrades     Knowledge articles and additional support accessible from our <u>Customer portal</u> Easy integration with other software	
Thank you again for choosing us, and welcome to the team!	
The Access Group is one of the largest UK-headquartered providers of business management software to small and mid-sized organisations in the UK, Ireland and Asia Paditic. It helps more than 75,000 customers across commercial and non-profit sectors become more productive and efficient. Its innovative Access Workspace doubt solutions transform the way business software is used, giving every employee the freedom to do more of what's important to them. Founded in 1991, The Access Group employs approximately 6,300 people. <a href="https://www.theaccessgroup.com">www.theaccessgroup.com</a>	
← Reply	

 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.

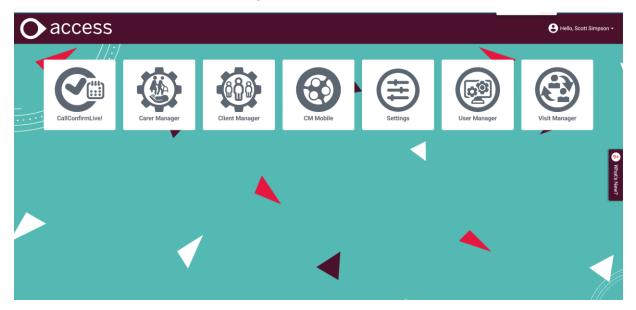


#### Laptop Access

- 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.

🍓 🗊 🗊 🗅 - Eforms Dashboard	x Gredirector	🛪 🔛 Caredrector	🗴 💿 Access Group UK   Login Page 🛛 x 🚳 Close Receiver	x CalConfirmLinet	X Settings	🗴 📔 Welcome to our Procedures for / 🗴   +	- 0 X
← C බ Ö https/login.hastle							· · · · · · · · · · · · · · · · · · ·
🗋 💼 CareDirector 🛅 Sech in Care 💼	CM0300 🛅 Support Deck 🛅 I	Learning 🛅 Advanced 🛅 Intranet/ Silk					Cither fevrurites
			Welcome, pleas	kD	Res		
		<b></b>		◀			1

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



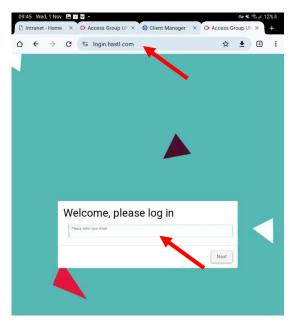


## **Tablet Access**

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

 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 <u>adultssystemsupport@wakefield.gov.uk</u> know.

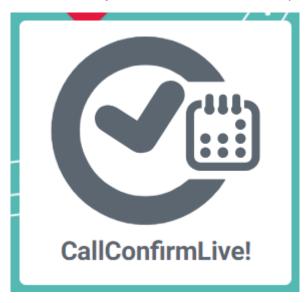
Role	Options
Manager	CallConfirmLive
	Carer Manager
	Client Manager
	Visit Manager
Co-ordinator	
	Carer Manager
	Client Manager
	Visit Manager
Planner	CallConfirmLive
	Carer Manager
	Client Manager
	Visit Manager
	<b>.</b>
TI	CallConfirmLive
	Carer Manager
	Client Manager
	CM Mobile
ОТ	CallConfirmLive
	Carer Manager
	Client Manager
	CM Mobile
Practitioner	CallConfirmLive
	Carer Manager
	Client Manager CM Mobile
	Visit Manager
	VISILIMAIIAGEI
Support Assistant	CM Mobile
Physio	CallConfirmLive
	Carer Manager
	Client Manager
	Cm Mobile

## Role Options



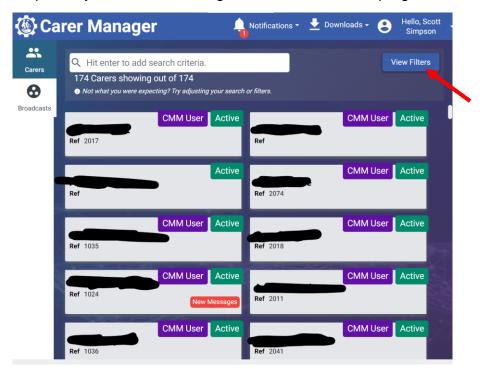
## CallConfirmLive!

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**

- 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.

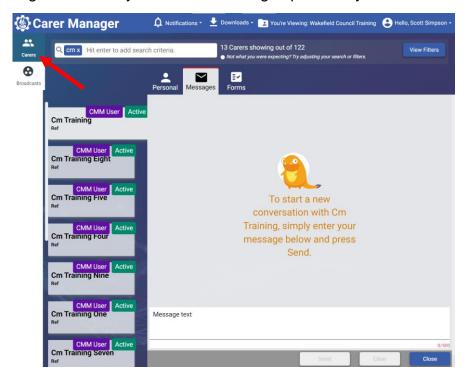




- 3. On the left you can choose from "Carers" or "Broadcasts"
  - a. Carers: Individual personal messages
  - b. Broadcasts: Group broadcast messages

🍥 Ca	rer Manage	er	Notifications -	🛨 Downloads 🗸 😫	Hello, Scott Simpson
Carers	C Hit enter to add 174 Carers showin Not what you were exp		r search or filters.		View Filters
Broadcasts	Ref 2017	CMM User A	Ref	CMM User	Active
	Ref		Ref 2074	CMM User	Active
	<b>Ref</b> 1035	CMM User A	<b>Ref</b> 2018	CMM User	
	<b>Ref</b> 1024	CMM User Ad	Ref 2011	CMM User	
	<b>Ref</b> 1036	CMM User A	Ref 2041	CMM User	Active

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.

🛞 Carer Manager	🛕 Notifications * 👱 Downloads * 💽 You're Viewing: Wakefield Council Training  🕃 Hello, Scott Simpson +
Carers Q Hit enter to add search criter	ia. 1 Broadcast Group found. ● Not what you were expecting? Try adjusting your search or filters.
Add New Broadcast Group	
	Broadcast Settings
	Q. Hit Enter to add search criteria
CM Training Description Test broadcast to training gro	1 Message found. ● Not what you were expecting? Try adjusting your search or filters.
	Sent on 18/08/2023, 14:37:58 The following Visit requires cover, please contact the office if you are available to do this. Date: 18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG First read on 19/08/2023, 22:26:24 Read By 10 Users. Click to view more details
	Message text
THE	0.500
	Request Sand Clear Close Close

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.

Q Hit enter to add search cr	eria. 1 Broadcast Group found.	
	O Not what you were expecting? Try adjusting your searched and the sear	rch or filters.
Add New Broadcast Group		
	Broadcast Settings	
	Q Hit Enter to add search criteria	
	1 Message found.	
CM Training Description Test broadcast to training gro	Not what you were expecting? Try adjusting your search or filters.	
		Sent on 18/08/2023, 14:
	The following Visit requires cover, please contact the office if	
	The following Visit requires cover, please contact the office if 18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG	
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi Read f	you are available to do this. D irst read on 19/08/2023, 22:26:24
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG	you are available to do this. D irst read on 19/08/2023, 22:26:24 by 10 Users. Click to view more de O Post Code:
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG Fi Read 1 dd/mm/yyyy This field is required This field is This field is required This fi	you are available to do this. D irst read on 19/08/2023, 22:26:24 by 10 Users. Click to view more de O Post Code:
	18/8/2023 Time: 14:30 - 15:00 Post Code: WF62GG	i you are available to do this. D irst read on 19/08/2023, 22:26:24 By 10 Users. Click to view more de y 10 Users. Click to view more de Post Code:

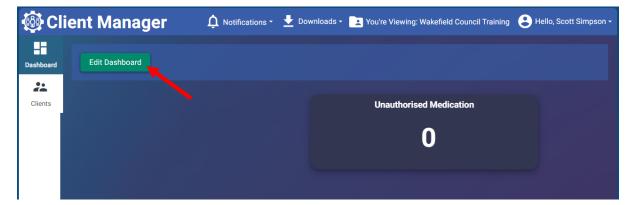


## **Client Manager**

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

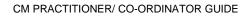


2. When opened, you will first see the "**Dashboard**" screen. This can be tailored to what you need to see. Select "Edit Dashboard" to make those reporting changes.



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.

🚳 Cli	ient Manager	🋕 Notifications 👻 🛓 Downloads 🕘 You're Viewing: Wakefield Council Training 😫	Hello, Scott Simpson 🗸	
Dashboard	Q. cm	11 Clients showing out of 89 ● Not what you were expecting? Try adjusting your search or filters.	View Filters	
Clients		Personal Devices Feedback Contacts Health Forms eMAR	Journal Outcor	
	Cm Client     Active       Address     10 Sycamore TerraDOB (Not set)       Service Start (Not set)       Service End (Not set)       Cm Client 1     Active       Address 6 Sycamore Te DOB (Not t set)       Service       Start (Not set)       Service	Personal Details         Title (Read Only)         Unknown         Forename (Read Only)         Surname (Read Only)         Client         Known As (Read Only)         Gender (Read Only)         Gender (Read Only)		
	Service End (Not set) Cm Client 2 Active Address Aberford Roa DOB (Not set) Service Start (Not set) Service End (Not set) Cm Client 3 Active Address Wakefield On DOB (Not set)	Date Of Birth (Read Only)          NHS Number (Read Only)         Contact Details         Personal Email (Read Only)         Primary Telephone (Read Only)         07123 64923		
	Service Start (Not set)	Secondary Telephone (Read Only)	Close	





4. These are the differences in the tabs:

	<b>Purpose</b> Will show all personal information about that client. Not applicable.
	Shows all client feedback when it comes into CM Mobile.
	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.

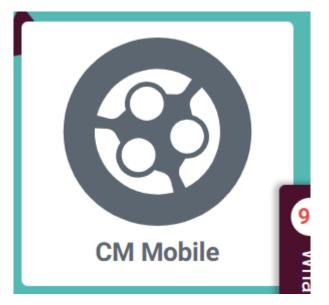
"Downloads" > "Download Type" > Select.

🐼 Client Manager	🛕 Notifications - 🛨 Downloads	• 🕒 You're Viewir	ng: Wakefield Co	ouncil Training 🙁	Hello, Scott Si	impson <del>-</del>
:	Downloads X Clos					
Dashboard Q cm	Please configure your	owing out of 89 were expecting? Try a		ch or filters.	View Fil	Iters
Clients	download	Contacts H		rms eMAR	Journal	Outcor
L	Client Feedback All Active MAR Charts To-Do List Details					
Address 10 Sycamore TerraDOB (1	Client Forms					
Service Start (Not	Title (Read Only) Unknown					



# **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.

🔁 Vi	sit Manager	🚽 Downloads -	You're Viewing: Wakefield Council Training	😫 Hello, Scott Simpson 🗸
Dashboard	Edit Dashboard			
()				
Visit Screen	Upcoming Uncovered Visits		Today's Missed Visits	

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 Viev	ving: Wakefield Council Training	😫 Hello, Scott Simpson -
Dashboard Q. Hit Enter to add search criteria.	0 Visits found.	Filters	Hide
Ownload Current Visits has moved to	Not what you were expecting?	©Date	Show
Visit Screen		<b>O</b> Client Location	Show
		★ Client	Show
		Planned Carer	Show
		Carer Branch	Show
		<b>∲</b> GPS	Show
		▲Exceptions	Show
		Capture Method	Show
		Offline	Show
		Visit Logs	Show
		Ap	ply
Accession of the second s		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.

🔁 Visi	it Manager	🛨 Downloads	<ul> <li>You're Viewing: Wakefield Council Training</li> </ul>	Hello, Scott Simpson -
Dashboard	<ul> <li>Q cm</li> <li>i) Download Current V</li> </ul>		showing out of 78 t you were expecting? Try adjusting your search or filters.	View Filters Modern
			Actual: wor Staned	View Logs
	Client: Client, Cm	Planned Carer: Training One, Cm	Planned: 11:30:00 - 12:00:00 (30 mins) Actual: Not Started	No Visit Log
	Client: Client, Cm	Planned Carer: Training, Cm	Planned: 11:30:00 - 12:00:00 (30 mins) Actual: 12:53:21 - 12:57:25 (4 mins) O GPS Captured	Recordend By QR
	Client: Client 1, Cm	Planned Carer: Training One, Cm	Planned: 13:30:00 - 14:00:00 (30 mins) Actual: Not Started	No Visit Log
	Client: Client 4, Cm	Planned Carer: Training Four, Cm	Planned: 13:30:00 - 14:00:00 (30 mins) Actual: Not Started	No Visit Log
	Client: Client 5, Cm	Planned Carer: Training Five, Cm	Planned: 13:30:00 - 14:00:00 (30 mins) Actual: Not Started	No Visit Log

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".

53°41'11.4"N 1°18'59.4"W	53°41'11.3"N 1°18'59.2"W
10 Mill Hill Ln, Pontefract WF8 4JA	10 Mill Hill Ln, Pontefract WF8 4JA
View larger map	View larger map
Lacy Gardens	-acy Gardens
Mill Hill Ln	Nill Hill Ln
Fbp Construction Temporarily closed	Fbp Construction Temporarily closed
Keyboard shortcuts Map data ©2023 Terms Report a map error	Keyboard shortcuts Map data ©2023 Terms Report a map error

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

Cm (	Client's Visit on Wednesday 20 Septembe	r 2023
0	Visit Logs	
	All tasks completed All tasks completed	
You are una	ble to add Visit Logs due to your current permissions. Please contact your Office.	Close

# 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.

CallConfi	rmLive! - wake	efield				
System 👻	🕤 Go 🝷 🗍 /	Actions 🝷 🖑 Tools 🝷 🤱 Statu	s: Active 🝷 鏅 I	Navigator 🕜 Help 👻		
CM2000	Clients					
	Basic Advar	nced				
	Agency:	(All) -	Location:	(All) •	Find Now	
Clients	Contract:	(All) 🗸	Branch:	(All) 👻	Reset	
2	Forename:		Telephone:			
Care Workers	Surname:					
	Reference:					
	Soc. Serv. Re	f.:	PIN:			
Visits	Agency		Name		PIN	Telephone
2						
Events						
Reports						

- 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

Clients						
Basic Adva	anced					_
Agency:	(All)	✓ Location:	(All)	•	Find Now	
Contract:	(All)	✓ Branch:	(All)	-	Reset	
Forename:		Telephone:				
Surname:						
Reference:						
Soc. Serv. Re	ef.:	PIN:				
Agency		Name		F	NIN	Teleph



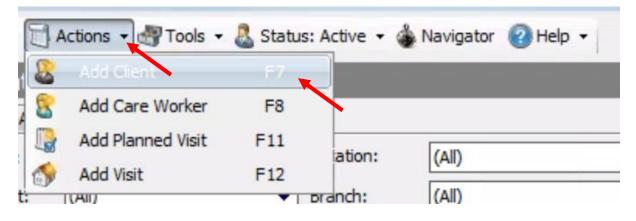
4. Double click the entry from the list below.

Clients											
Basic Advar	nced										
Agency:	zzzWakefield Training	<ul> <li>Location:</li> </ul>	(AI)	Find Nov							
Contract:	(AI)	Branch:	(All)	Reset							
Forename:		Telephone:									
Surname:											
Reference:		-									
Soc. Serv. Re	f.:	PIN:									
Agency		Name		A PIN	Telephone	RTA	Location	Reference	Client Type	Soc. Serv. Ref.	Branch
zzzWakefield Tr	aining	Archer, Ken		A 1941	01924 375527	N/A	Cocarion	NEIBBILE	Clent Type	DAL DEV. NET	Extra Care
zzzWakefield Tr		Armitage, Ivor	r		01924 257631		Extra Care Sherwood				Extra Care
zzzWakefield Tr	aining	Atkinson, Milor	rd	7989	Not on Phone	15 mins	Reablement East				Reablement
zzzWakefield Tr	aining	Beards, Karen			Not on Phone						
zzzWakefield Tr		Briggs, Trish			Not on Phone						Extra
zzzWakefield Tr		Broadbent, Ma			Not on Phone		Extra Care Sherwood				Extra) 🌔 📋 🕞
zzzWakefield Tr		Bromley, Mich	ael		01924 768464		Extra Care Sherwood				Extra
zzzWakefield Tr	aining	Brown, Bob		0008	12345 678910						Extra Care



## **Creating Clients (Reablement Only)**

- 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**."

& New Client		
😭 Save and Close 🛛 🗧 Save 🗯	🗋 Close 🔱 Active 🕤 Go 🗸 🎄 Navigator 🕜 Help	
Basic Details Misc. Details Misc. Details Financial Observations / Warnings Alerts Visit Plan Visit Plan Visit Plan (List View)	Title:	Agency Agency: zzzWakefield Council Originating Agency: Contract: Branch: Call Type: Aura Telephone Number: 2nd Number: Not known Not on phone
Stops / Prefs Private Address Medical / Contacts	S Line 1: Line 2: Line 3: Town: County: Post Code: $$	Not known       Not on phone         Personal Details <ul> <li>Gender:</li> <li>Marital Status:</li> <li>Living Category:</li> <li>Religion:</li> <li>Ethnic Origin:</li> </ul>
Not yet : Not yet :		



- 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.

2	Title:	Mr 👻
6	Forename(s):	Timmy
	Surname:	Guide
	Known As:	
	🔲 Name not k	nown
	V Date of Bir	th: 03/05/1940 -
	Client ID:	
	Right To Be	Faranthan

- 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).

Address	;	
	Line 1:	
~	Line 2:	
	Line 3:	
	Town:	
	County:	
	Post Code:	WF62GG



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."

Address	Search F	lesults			
Line 1: Line 2: Line 3: Town: County: Post Code: WF62GG Search M Partial post codes require at least one additional field e.g. Town.		Address           9 Sycamore Terrace Normanton, WF6 2GG           10 Sycamore Terrace Normanton, WF6 2GG           11 Sycamore Terrace Normanton, WF6 2GG           12 Sycamore Terrace Normanton, WF6 2GG           14 Sycamore Terrace Normanton, WF6 2GG           15 Sycamore Terrace Normanton, WF6 2GG           16 Sycamore Terrace Normanton, WF6 2GG           17 Sycamore Terrace Normanton, WF6 2GG           18 Sycamore Terrace Normanton, WF6 2GG           20 Sycamore Terrace Normanton, WF6 2GG           22 Sycamore Terrace Normanton, WF6 2GG           24 Sycamore Terrace Normanton, WF6 2GG	Results	E	Select Addre

- 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

Agency	Agency:	zzzWakefield Council
	Originating	Agency:
	Contract:	Reablement
	Branch:	Reablement East
	Call Type:	Aura 👻



- 5. Telephone section:

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

Telepho	one	
9	Number:	01111111
	2nd Number:	
	🔘 Not known	Not on phone

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

& New Client		
🕞 Save and Close 🛛 🕞	Save 🦳 Close 🤱 Active 🕤 Go 🗸 🎄 Navigator 🕜 Help	
Basic Details Misc. Details Misc. Details Financial Observations / Warnings Alerts Visit Plan Visit Plan Visit Plan (List View) Stops / Prefs	Name The: Mr Forename(s): Timmy Surname: Guide Known As: Name not known V Date of Birth: 03/05/1940 Client ID: Right To Be Forgotten	Agency Agency: zzzWakefield Council   Originating Agency: Contract: Reablement Branch: Reablement East V Call Type: Aura  Telephone  Onumber: Olililii Onumber: Not known Not on phone
Private Medical / Contacts	Address Line 1: 20 Sycamore Terrace Line 2: Line 3: Town: Normanton County: West Yorkshire Post Code: WF6 2GG	Personal Details Gender: Marital Status: Living Category: Religion: Ethnic Origin:



#### Misc. Details

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

Basic Details	Misc. Settings	Notes	
	PIN: 00010 <- Assign	Note Description From To Display	
Misc. Details	Reference:		
Financial	Keysafe Number: 1234		×
Observations Warnings	Access Notes: Door box.		
Alerts	Email Address:		
Visit Plan	Care Manager:		
Visit Plan (Lis View)	t Property Type:		
Stops / Prefs	Use of Telephone: Yes (Assumed)	Continuity of Care Analysis since 10/05/2023 Carer Visits	
Private	Start and End Dates		
Medical /	Start and End Dates		
Contacts	Service ended on: 10/07/2023 History		
	Service End Reason:		
	System Settings	Call Summary since 10/05/2023	
	These settings should only be modified by CM2000 Support	No calls have been received	
	Always use Rem. Menu Reason:		
	Break In Programme Client		



- 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.

Misc. S	ettings	
2	PIN:	00010 <- Assign
0	Reference:	
	Keysafe Number:	1234
	Access Notes:	Door box.
	Email Address:	
	Care Manager:	v
	Property Type:	<b></b>
	Use of Telephone:	Yes (Assumed) 🔹

- 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.

Service started on:	10/07/2023 🔻	
Service ended on:	10/07/2023 💌	History
Service End Reason:		



## **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.

Note Description	From	To	Display	-
				ER.
				X

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

lote Description	From	To	Display	1
				0
				X
				100



- 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.

e:				
NL	Notes		×	
٦	Client N	ote		
ot		Description:	OK Cancel	
ire		Note Type:	None	
na		From Date:	18/09/2023 - Ito: 18/09/2023 -	
т		Display Or	n Rota	
ele		Do not enter	any personal identifiable information	7/2
			*	H
s				F
2				
e (				
nc			-	
	Not yet sa			
tin,	Not yet up	dated	latest call was received on	108



## **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.

23
Visits
22



### Financial

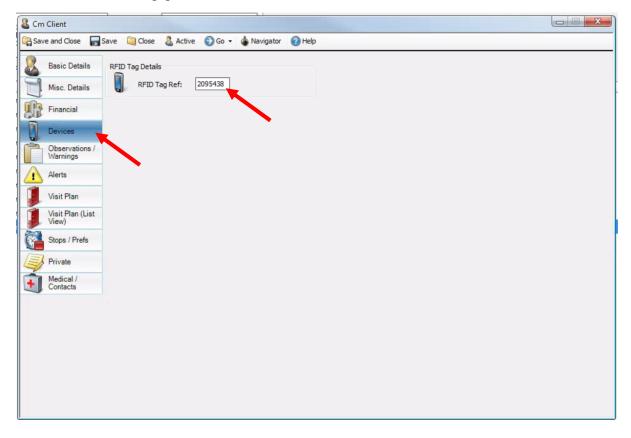
- 1. Little information required, on the financial section:
  - a. Soc. Services. Ref.: This is the Caredirector ID of the client.

& New Client		
Save and Close 🛛 🕞 S	Gave 🦳 Close 🤱 Active 🕤 Go 🔻 🎄 Navigator 🕜 Help	
Basic Details	Financial         Imported Agency SS Ref:         Iype:         Soc. Services Ref.:         Qost Centre:         Qost Centre:         Invoice Rate:         Qharge Assessment:         Qharge Assessment:         InForm Reference:         Referral Source:         Referral Date:         10/07/2023         This Client only has Private Visits         No. Visits per week:         0         This Client Pays For Their Service	Fuller



#### **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.



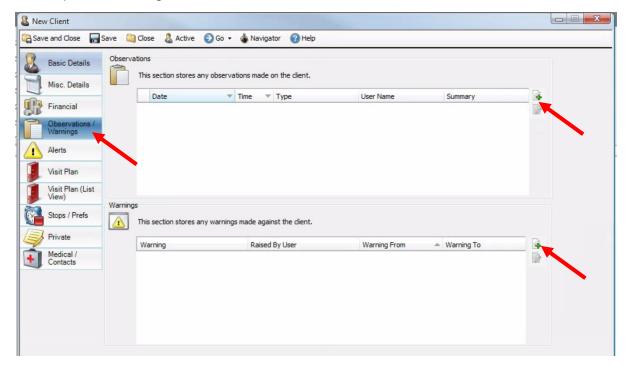
4. Type that numbers into the blank box next to "RFID Tag Ref:"



- 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.

& New Client		
😭 Save and Close 🛛 🕞	Save 📋 Close 🔱 Active 😥 Go 👻 🎄 Navigator 🕜 Help	
Basic Details	Real-Time Alert Setup	
Misc. Details	Raise Alerts for this Client     Always Set Imported Planned Visits with RTA	
Financial	0 minutes (x) mins	
Observations / Warnings	Alerts Raised	
Alerts	From: 10/05/2023 - to: 10/07/2023 - Find Now	
Visit Plan	Date Visit Time Raised Care Worker Tries OK ?	
Visit Plan (List View)		
Stops / Prefs		
Private		
Medical / Contacts		
	0 alerts found.	
	Latest Alert Details An Unknown Client Alert has not been needed	
	ni onivini dia cha cita filo dell'iteque	

#### **Panic Alerts**

 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.

Miss Clare Slate						
Save and Close	Save 🔍	Close 🔮 Active 🕥 Go +	🔹 Nevigetor 🛛 Help			
8 Basic Details	Latest	Nert Details An Unknown Worker Alert has r	ot been needed.			
Misc Details	4					
Activities	Peric A	lerts				
Devices		Requested Date/Time	→ Caling Alerts	Attempts	Reised Date/Time	
	4	23/02/2021 10:30:01	0701234567	1	23/02/2021 10:30:01	
Expenses		19/01/2021 14:36:54	01332830475	1	19/01/2021 14:36:54	
		08/03/2021 11:52:01	0701234967		08/03/2021 11:52:01	
Voice Mail		08/02/2021 14:38:18	07947304817	1	08/02/2021 14:38:18	
Aleta		08/02/2021 14:37:10	07947304817	1	08/02/2021 14:37:10	
		08/02/2021 14:32:28	07947304817	1	08/02/2021 14:32:28	
Atlendance		09/03/3031 14/31-07	070473048+7		00/00/10/11 14/01/07	
Visit Plan	Protect	Ne				
Stan Plan		Created Date/Time	ProtectHe Date/Time	e	Status	



## Stops/ Prefs

#### Service Stops

- 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.

& New	Client								
G Save	and Close 📊	Save 🞑	Close 🚨 Active 🌘	🕑 Go 👻 🎄 Navigator 🛛 💡	Help				
<b>&amp;</b> E	Basic Details	Service	Stops From: 10/04/2023	▼ To: 10/07/2024 ▼	Find Now				
	Misc. Details		From	▼ To			Notes	B	
	Financial		From	• 10	Туре		Notes		
	Observations / Warnings								
1	Alerts								
1	/isit Plan								
	√isit Plan (List √iew)	Preferer	nces			Languages			
<b>8</b>	Stops / Prefs		Exclude these care wo						
F	Private	~	Date Added	<ul> <li>Care Worker Name</li> </ul>		Lang	uage Compet	ency 🔒	
1	Medical / Contacts		•						
			Preferred gender:	No Preference	•				
			Is High Risk		w				
			Has Challenging Be	haviour					

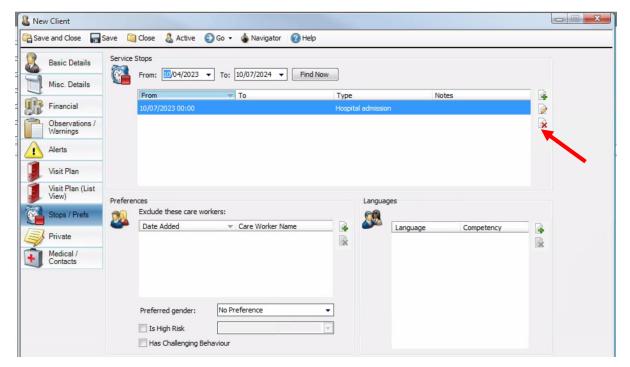
- 3. This will open another window, when finished select "Ok":
  - a. **Type**: Select the relevant option.
  - b. From: When they want the service stop to begin. (Time is available).
  - c. **To**: If readmission into hospital with no end date, leave unticked as this will stop all services for the near future. Later, you can come back and add a to. If it is a short holiday put in when they will be back.



CM PRACTITIONER/ CO-ORDINATOR GUIDE

🖥 Servi	ce Stop	×
2	Type:	Hospital admission
	From:	10/07/2023 - 00:00 - Cancel
	To:	10/07/2023 🚽 23:59 🜩
		Do not enter any personal identifiable information
	Notes:	<b>^</b>

- 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.

& New Client							
Save and Close	न Save	Close 🔱 Active	🔁 Go 👻 🎍 Navigator 🛛 😨 He	łp			
Basic Details	- 61	Stops From: 10/04/2023	▼ To: 10/07/2024 ▼ Fin	d Now			
Financial		From 10/07/2023 00:00	To	Type Hospital	admission	Notes	
Observations Warnings	s /						Updat Service Stop
Alerts							
Visit Plan							
Visit Plan (Li View)	st Prefere	nces			Languages		
Stops / Prefs	2	Exclude these care w	orkers:		<b>M</b>		
Private	~	Date Added	▼ Care Worker Name		Langu	age Competency	
Medical / Contacts							
		Preferred gender:	No Preference	•			
		Is High Risk		*			
		Has Challenging Be	ehaviour				

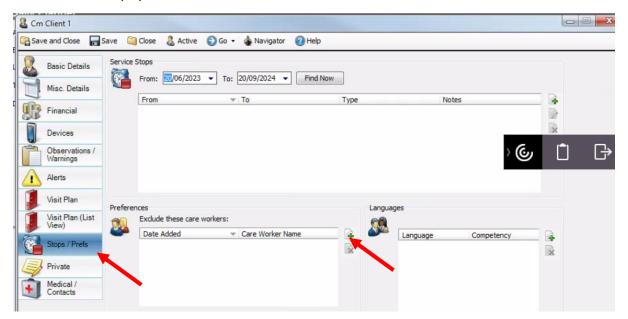
## Support Assistant Exclusion

- 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.

CallConfi	rmLive! - wa	akefield								
System 👻	🕤 Go 🔹 🗍	Actions 🝷 😽 Tools	🔹 🚨 Status	Active -	🚯 Navigator	🕜 Help 🗸	· [			
CM2000	Daily P	lanner								
Clients	Agency: Branch: Location: Team: Date:	zzzWakefield Trainin           (AII)           (AII)           (AII)           (AII)           (20/09/2023 *	- 			Visits due to		-	Find Now Reset Hide Filters	
	Client Pla	nner								
Visits	⊖ ∉ Client	) 1, Cm		06:00	07:00	08:00		10:00	0 11:00 12:00 13:00 14:00 Open Visit	<b>6 1 B</b>
Events	Client Client							1 2	Open Carer Open Client	Čm Tr
	Client			•					Nudge Visits Unassign Carer	Em Tr Em Tr
Reports	🔱 Car	re Worker							Delete Visit	
	₽œ	)		06:00	07:00	08:00	09:00	1	Open Visit Plan 0	15:00 16:00 17:
Daily Planner	Karen	Kay	2510					2	Show Client Locations	<b>^</b>
2	Andy T	Fraining	2500					~	Show Route Add Service Stop For Client	
Weekly	Emma	Test A Test	2500							
Planner	Joe Br	own	2500							
	Peter H	King	2500							· · · ·

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





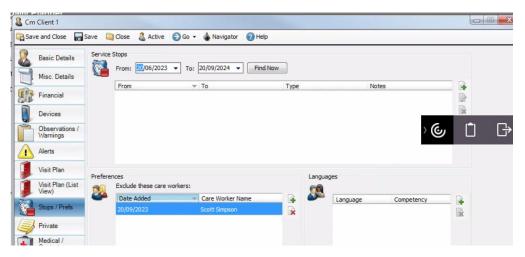
5. A new window will open, asking which carer needs to be excluded. When found press "**Ok**".

Details	s Select the care worker you wish to exclude	ОК
X		Cancel

6. When "Ok" has been selected, a new window will appear. Select "Yes".

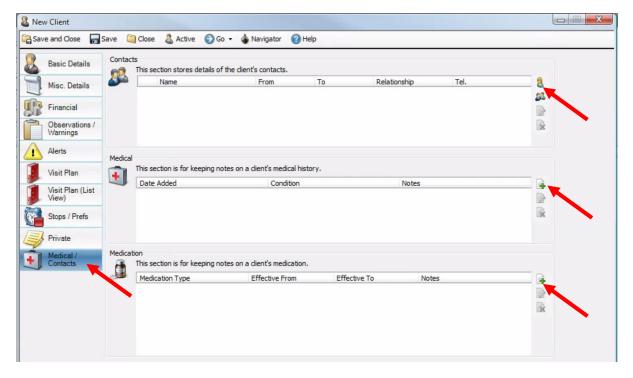
		CallConfirmL					
4	Do you wish to remove the excluded Care Worker from any planned visits that they are currently assigned to for this client?						
		Yes	No	Cancel			
		Yes	No	Cance			

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**

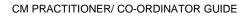
- This is the section to include any point of contacts, any medical requirements from carers and any medication required.
   Please note: Medication, please use the existing form to complete this.
   Medication implementation will be at a future date.
- 2. Remember to use the paper with the green plus 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**."

Save and Close	Save 🧎	Close 🚨 Active 🕥 🤇	Go 🔻 🎄 Navigator 🌘	Help			
Basic Details	Contacts	s This section stores details o	of the client's contacts.				
Misc. Details		Name	From	То	Relationship	Tel.	8
Financial							<u>8</u> 2
Observations / Warnings							*
Alerts	Medical						
Visit Plan		This section is for keeping r	notes on a client's medica	history.			





## 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.

CallConfi	rmLive! - wakef	field				
System 👻	🕤 Go 👻 🗍 A	ctions 🚽 🖑 Tools 🗸	🚨 Status: A	ctive 👻 🎄 Navig	jator 🕜 Help 👻	
CM2000	Visits 🚨	Add Client	F7			
	Basic / 😵	Add Care Worker	F8			
X	Agency:	Add Planned Visit	F11	r 💿 In the	last 👻 2 🚍 Hour(s) 🗸	Find Now
Clients	Contract	Add Visit	F12	© From:		Reset
1	Location:	(All)		O Period:	(All)	Hide Filters
4	Client:	(All)		Team:	(All)	•
Care Werkers		-		_		Chow care



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"?

New \	Visit		×
Details			ОК
	Agency:	Wakefield Council (new)	Cancel
	Client:	<b>└</b>	Cancel
	Recorded by:	The Office	
	Care Worker:	<b></b>	
	Reason:	<b></b>	
	Date:	03/10/2023 🔻	
	Type:	Start Event only	
		C End Event only	
		Start and End Event	
	From:	10:00 🗘	
	To:	10:30 🗘	

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

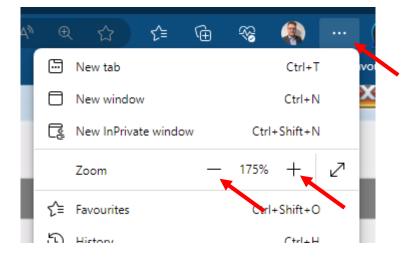


# **Daily Planner – Offloading and Shuffling**

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.

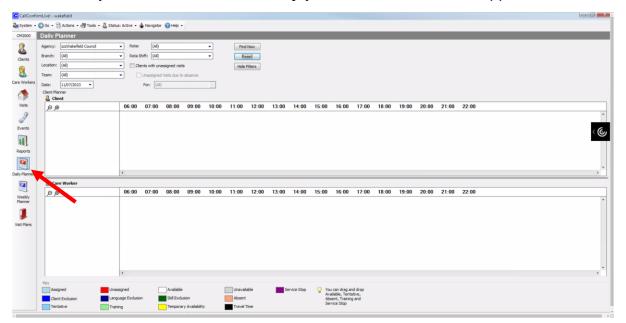
#### Zooming in and out

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.

	Rota:	(AI)				d Now											
Agency: zzzWakefield Training Branch: (All)		hift: (All)				leset	<b>K</b>										
Location: (All)		nts with unas	signed visits		_	e Filters											
Team: (All)	-		isits due to ab	sence													
Date: 11/07/2023 -		For: (AI)			-												
Client Planner					_												
Lient	06:00	07:00	08:00	09:00 1	0:00 11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	
(A)	00.00	07.00	00.00		ny	12.00	Am	14.00	15.00	10.00	(Un	10.00	19.00	20.00	21.00		
The second se		(		_													
Test, Sarah			(Una														
Test, Tom			(Un					(Un									
Test1, Sarah				Jan													
Training, Jon				(U	n												
Training, Lily				Carol													
Training, Tom																	
8 Care Worker																	
,⊖ ,⊕	06:00	07:00	08:00	09:00 1	0:00 11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	
Alison (ginny) White						Do											
Alison Bradley																	
Alison Skidmore																	
Alison Skidmore Ally Test A Test		Jone	Ford,	Ta	nd	Jon	Tan										
		30110															
Ally Test A Test	_	30110															
Ally Test A Test Amy Coates		30110															
Ally Test A Test Amy Coates Andrea Hargreaves		Jone															
Ally Test A Test Amy Coates Andrea Hargreaves Andy Training		Jone															
Ally Test A Test Amy Coates Andrea Hargreaves Andy Training Angela Matthews		June															

#### 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.

lient Planner																			
🚨 Client						10.00					15.00				10.00				
₽ @		06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	
Test, Sarah			-	(Un	0														<
Test, Tom				(Un						(Un									
Test1, Sarah					lan														
Training, Jon						(Un													
Training, Lily		٠																	>
8 Care Worker																			
⊕ ⊕		06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	
Patricia Frackleton	2603																		
Karen Kay	2510																		
	2500																		
Ally Test A Test																			
Ally Test A Test Clare Training	2500																		
	2500 2500																		

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.

ÐÐ		06:00	07:00	09:00	10:00	11:00	
Test, Sarah				(Una	3		
Test, Tom				(Un	Faulcia Frackleto	1	
Test1, Sarah					lan		
Training, Jon						(Un	
Training, Lily		•	1	1			
8 Care Worker							
ØØ		06:00	07:00	08:00	09:00	10:00	11:00
Patricia Frackleton	2603						
Karen Kay	2510						

a. Unsnapped: meaning there will be an issue with time.

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

ÐÐ	06:00	07:00	08:00	09:00	10:00
Test, Sarah			(Una	a	
Test, Tom			rau cia	1	
Test1, Sarah				lan	
Training, Jon					(Un



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.

ÐÐ		06:00	07:00	08:00	09:00	10:00
Test, Sarah				(Una	3	
Test, Tom				Pat	1	
Test1, Sarah					Jan	
Training, Jon						(Un
Training, Lily		•				
🔱 Care Worker						
ÐÐ		06:00	07:00	08:00	09:00	10:00
Patricia Frackleton	2603			Tes		
Karen Kay	2510					

#### 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**".

ÐÐ		06:00	07:00	08:00	09:00	10:00	11:00	12:00	
Test, Sarah				(Una					
Test, Tom				Pat					
Test1, Sarah					Open V				
Training, Jon				8	Open C			-	
Training, Lily	Training, Lily								
🔱 Care Worker					-	in Carer			
ÐÐ		06:00	07:00	08:0 🚳	Delete	Visit			
Patricia Frackleton	2603			٦ 🕽	Open V	isit Plan		-	
Karen Kay	2510					lient Locatio	ns		
Ally Test A Test	2500			~	Show R		Client		
Clare Training	2500			<b>X</b>	Add Se	rvice Stop Fo	r Client		

## **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."

₽₽		06:00	07:00	08:00	09:00	10:00	11:00	12:00
Test, Sarah				(Una				
Test, Tom				Pat				
Test1, Sarah					Open Vis			
Training, Jon				8	Open Ca			
Training, Lily	•			Open Cli Nudge V				
Care Worker					Unassign			
		06:00	07:00	08:0 🚳	Delete Vi	isit		
Patricia Frackleton	2603			۵	Open Vis	sit Plan		
Karen Kay	2510			<u>~</u>		ient Locatio	ns	
Ally Test A Test	2500			~	Show Ro		Client	
lare Training 2500				<b>X</b>	Add Serv	vice Stop Fo	rClient	

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

Nudge Visit Times	
Nudge Visit Times	ОК
Select (or enter) the number of minutes you would like to nudge the selected visits by.	
would like to hudge the selected visits by.	Cancel
Nudge  Forwards  Backwards by:	
In 5 minutes	
10 minutes	
15 minutes	
Other: 1 🚔 minutes	



## 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.

ÐÐ		06:00	07:00	08:00	09:00	10:00	11:00	12:00	13
Taylor-elsby, John				(U					
Test, Sarah				(Una					
Test, Tom	_			Pat					_
Test1, Sarah					Open V				
Training, Jon				8	Open C				
		•		&	Open C				
🔱 Care Worker				0	Nudge				
₽₽		06:00	07:00	08:0	Unassig				13
Patricia Frackleton	2603			Т 🔒	Delete \	/isit isit Plan			
Karen Kay	2510				-	lient Locatio	ons		
Ally Test A Test	2500			$\sim$	Show R				
Clare Training	2500			×	Add Ser	vice Stop Fo	or Client		

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."

Servi Servi	ce Stop		×
<b>1</b>	Type:	Other 🗸	ОК
-	From:	11/07/2023 🔻 08:00 🗘	Cancel
	🔽 To:	11/07/2023 👻 08:30 🗘	
		Do not enter any personal identifiable information	
	Notes:	Going to see family	
_			
Not yet u	date unkn updated	own	

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.

(							
	U						
	(Una	a					
	Pat						
		Jan					
			Pat	Pat Jah	Pat Jan	Pat Jan	



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.

ÐÐ	06:00	07:00	08:00	09:00	10:00	11:00	<b>12:00</b>	13:00	14:00	15:00
Taylor-elsby, John			(U							
Test, Sarah			(Una	3						
Test, Tom			Pat							
Test1, Sarah				Jan						
Training, Jon				U	/11					

#### **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."

ÐÐ	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	1
Taylor-elsby, John			(U										
Test, Sarah			(Una	a						_			
Test, Tom			Pat									_	
Test1, Sarah				Jan						Open	Client		
Training, Jon	4				71.1			4					



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.

E Ton	n Test						
Sav	e and Close 📊	Save 📋	Close 🔱 Active 📀	Go 🝷 췕 Navigator 🛛 🔞 Hel;	0		
8	Basic Details	Service S	Stops From: 11/04/2023 -	To: 11/07/2024 - Find	Now		
U	Misc. Details		From	Το	Туре	Notes	- B
B	Financial		11/07/2023 14:00	11/07/2023 14:30	Other	Off to see family	
Î	Observations / Warnings		11/07/2023 08:00 22/05/2023 00:00	11/07/2023 08:30 24/05/2023 23:59	Other Holiday	Going to see family	
	Alerts					•	
-	Visit Plan						
	Visit Plan (List View)	Preferen	ices		Langua	ages	
6	Stops / Prefs	20	Exclude these care worke		60		
	Private	~	Date Added	<ul> <li>Care Worker Name</li> </ul>	& 🍑	Language Competency	
Í	Medical / Contacts						120

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

🔏 Ton	e and Close 📊 9	Save 📋	Close 🤱 Active 🕤 Go	<ul> <li>Avigator Part Help</li> </ul>			
8	Basic Details	Service	Stops				
	Misc. Details		From: 11/04/2023 To	: 11/07/2024 ▼ Find Now	Туре	Notes	-
B	Financial		11/07/2023 08:00	11/07/2023 08:30	Other	Going to see family	- j
	Observations / Warnings		22/05/2023 00:00	24/05/2023 23:59	Holiday		×
	Alerts						
	Visit Plan						
	Visit Plan (List View)	Preferer	nces		Languages		
6	Stops / Prefs	20	Exclude these care workers:	Care Worker Name		compatency	

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.

System -	0.00														
M2000	Daily P	Planner													
2	Agency:	zzzWakefield Training	▼ Rota:	(All)				Find	Now						
ents	Branch:	(All)	▼ Rota S	hift: (All)			-	Re	set						
	Location:	(All)	- Clie	ents with una	assigned visit	s		Hide i	Filters						
5	Team:	(All)													
		(~")	•	Unassigned	Visits due to	absence									
Workers	Date:	11/07/2023	• L	For: (All)		absence	Ŧ								
	Client Pla	11/07/2023 <b>•</b>	•			absence	Y								
•		11/07/2023	• 06:00			0 absence 09:00	v 10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:0
Visits	Client Pla	11/07/2023		For: (All)				11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:0
e Workers	Client Pla	11/07/2023   Inner ent -elsby, John		For: (All)	08:00	09:00		11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:0
Visits	Client Pla	i11/07/2023   inner ent -elsby, John Sarah		For: (All)	08:00	09:00		11:00	12:00	13:00	14:00 (Un	15:00	16:00	17:00	18:0
Visits	Client Pla	i11/07/2023   inner ent -elsby, John Sarah		For: (All)	08:00 (U	09:00		11:00	12:00	13:00		15:00	16:00	17:00	18:0

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.

₽₽		06:0	0	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00
Taylor-elsby, John					(U							
Test, Sarah					(Uni	3						
Test, Tom					Pat						Ally	
Test1, Sarah						Jan						
Training, Jon		4					41					
Care Worker			_									
₽ @		06:0	0	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00
Karen Kay	2510											
Ally Test A Test	2500										Tes	
Clare Training	2500											
		1										

# 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.



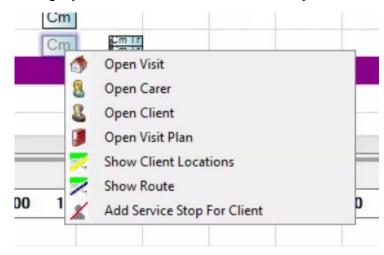
CM PRACTITIONER/ CO-ORDINATOR GUIDE

## **Daily Planner - Carer mismatch issues**

- 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 preexisting 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.

CM2000	Daily P	lanner								
2	Agency:	zzzWakefield Training	-	Rota:	(All)		•	Find Now		
Clients	Branch:	(All)	•	Rota Shift:	(All)			Reset		
	Location:	(All)	•	Clients w	ith unassig	ned visits		Hide Filters		
8	Team:	(All)	-	Una:	signed Visit	s due to abs	ence			
re Workers	Date:	18/09/2023 💌		For:	(All)		-			
	Client Pla				L					
Visits	₽€	)	06	:00 07	:00 0	8:00 0	9:00 10:00	11:00 12:00	13:00 14:00	15:00 16
2	Client	4, Cm					Cm	Cm Tr Cm Tr	Cm	Cm Ir
Events	Client	5, Cm					Cm		Cm	
	Client	6, Cm					Cm	Cm Ir Cm Ir	Cm	Cm Tr Cm Tr
	Client	7, Cm					Cm		Cm	
Reports	Client	8, Cm					Cm	Cm Ir	Cm	Cm Ir
	Client	9, Cm					Cm		Cm	
	Client,	Cm					Cm	Emir	Cm	Cmir
ily Planner	Conno	or, Susan								
		Brian				(Lina				

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".

Visit for Cm Client	
Save and Close 🛛 Save 📋 Close 💥 Delete 🌒 Create Planne	d Visit 🍈 Create Actual Visit 🍖 Cancel Actual Visit 💡 Help
anned Visit Actual Visit Tasks Skills Required	
Date and time	Other Details
Tate: 18/09/2023 🚽 🧊 (From Visit Plan)	RealTime alert category:
@ At: 13:30 ↔	Staffsafe' alarm category:
To: 14:00 0 Hours 30 Minutes	Contact Type:
O Any time	Reference:

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

Planned Visit Actual Visit Tasks Skills Required	
To: 14:00  O Hours 30 Minutes O Any time O Changing the time here can update the Visit Plan too.	etails  RealTime alert category:  Staffsafe' alarm category:  Contact Type:  Reference:  Contract Reference:  Funder:
Agency: ZZZWakefield Training CallConfirmLive!	Is Recorded
Rota: Rota Shift: Assign Care	d make the events inactive?
	Yes No
Planned Visit Notes	*
Created on 22/08/2023 at 06:55 by Planned Visits Agent Not yet updated	-

- 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.



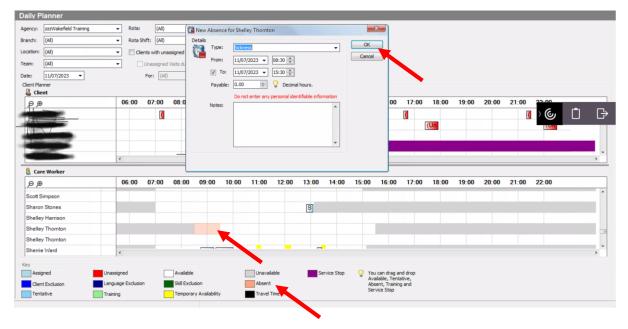
# Daily Planner – Key

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.

					Service Stop
Client Exclusion	Language Exclusion	Skill Exclusion	Absent		Absent, Training and
Assigned	Unassigned	Available	Unavailable	Service Stop	You can drag and drop Available, Tentative,
ey.					
,,	•				
Shelley Thornton	2500				
John Doe	2500				
Joe Brown	2500				
Clare Training	2500				
Ally Test A Test	2500			Tes	

## 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.

Weekly Plann	ner																							
Agency:	zzzWake	field Training	•	Week	Starting Date	: 10/07/20	23 -		Find	Now														
Oarer Branch:	(All)			] Team	:	(All)			Res	set														
Carer:	Scott Sin	npson	•	]					Hide F	ilters														
🔘 Rota:	Please si	elect a rota		Rota	Shift:	Please s	elect a rota :	shift –	Visit I	Plan only											C.	Ľ	1	B
Filter Unallocated Vis	isits list by:																				୍ତ	L	_	5
Client Location:	Reablem	ent East		Client	Branch:	Reablem	ent																	
Summary Week View	w for Care	Worker Scott	Simpson																					
ÐÐ		06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:0	0 21:	00	22:00	16				
Monday 10				Tes			_																	*
Tuesday 11						n Visits																		
Wednesday 12				Tes		Route																		~
Thursday 13		4																						
Кеу	_																							
Assigned		Unassign	ed	Av	ailable		Tentative		Unavailable	e	O You ca	n drag and d	rop Available											
Absent		Training		Ter	mp Availability		Travel Time				Tenta	ive, Absent a	nd Training											
Unallocated Visits fo	for the Week	¢																						
Client				Warnings		E	Exclusion		,	Rota		Ro	ta Shift		Sta Tim	rt e	Duration	Мо	Tu	We	Th	Fr	Sa	Su
Test, Tom		80 /	1234						1	East 14		07	00 - 15.00			08:00	00:30	• ¥		×	*	¥	*	×
Test, Tom		89 1	1234													14:00	00:30	)		~	~	~	~	~

## Visits

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

M2000	Visits								
0	Basic Advan	iced Advanced 2							
2	Agency:	Wakefield Council	(new) 👻	In the	last 🔻 2	Hou	ur(s) 🔻	Find Now	
lients	Contract:	(All)	•	O From:	03/10/2023 -	to: 03/1	0/2023 -	Reset	]
Care Workers	Location:	(All)	-	O Period:	(All)	All)		Hide Filters	1
	Client:	(All)	-	Team:	(All)				1
	Care Worker:	(All)	-	Reference:				Show care worker	
	Rota:	(All)	•	Rota Shift:	(All)			assignment	
	Agency		Contract		D	ay	Date	Planned Time	Client

## 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".

Actual Time	PL
10:36:18	#
10:25:00* - 10:30:00*	+5
10:20:00* - 10:25:00*	Or
10:15:25 - 10:36:14	-1
10:10:00* - 10:20:00*	Or
09:51:56 - 10:15:15	+4
09:51:56 - 10:06:42	+6
09:47:08 - 10:09:03	+2

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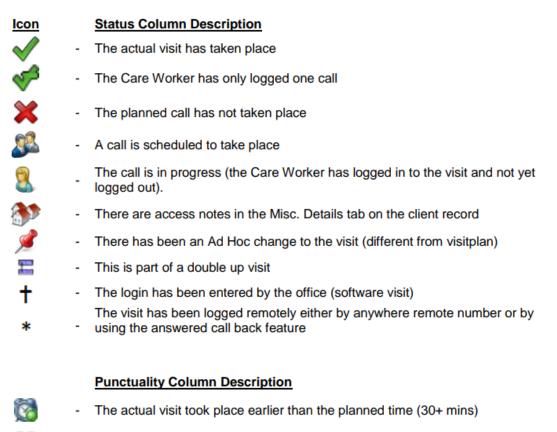
ctual Time 🧑	Open Visit	
):36:18	Complete Visit	
0:25:00* - 10:3	Open Client	
0:20:00* - 10:2 👧	Open Care Worker	
0:15:25 - 10:36	Add Service Stop For	
0:10:00* - 10:2	Open Visit Plan	
9:51:56 - 10:06	Show Client Locations	
9:47:08 - 10:09 🔀	Show nearby care workers	
9:36:17 - 09:50:37	-4 mins	00:14:20

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.

	Agency:	Wakefield Council (new)	ОК
JI.	Client:		Cancel
	Recorded by:	The Office	]
	Care Worker:	Carol Gascoigne	
	Reason:		
	Date:	03/10/2023 👻	
	Type:	<ul> <li>Start Event only</li> <li>End Event only</li> <li>Start and End Event</li> </ul>	
	From:	10:36 🗘	
	To:	11:06 🗘	



#### Visits – Icons



- 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

A



## **Events**

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

	Care Worker	
Ũ	Carol Gascoigne	4
	Katherine Burton	
2	Sherrie Ward	
2	Sherrie Ward	
2	Andrea Hargreaves	<u> </u>
2	Sherrie Ward	
2	Andrea Hargreaves	1
	Katherine Burton	2
	Carol Gascoigne	<u> </u>
2	Sherrie Ward	2
	Brodie Beever	
	Mark Millard	<u> </u>
	Donna Hanks	
	Melanie Smith	
	Sherrie Ward	<u> </u>
	Donna Hanks	42

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

	CL1.	01220 /23000
Ph	Date / Time:	03/10/2023 at 10:36
798	Call-in Number:	<none></none>
700	Event Type:	Arrival
70	Duration:	0 seconds
709	CLI Calling From:	<unknown></unknown>
768		



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



#### 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

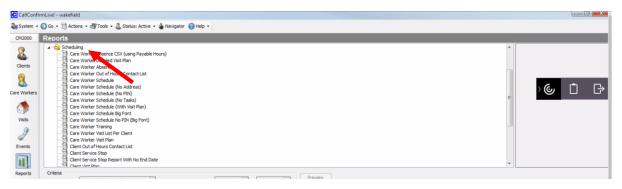


# **Printing Case Worker Schedules**

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

CallConfirm	nLive! - wakefiel	d					
🍓 System 🔹 🌘	🕑 Go 🔹 📆 Actio	ns 🔹 🎒 Tools 🔹 🔱 Status: Active 🔹	👍 Navigator 🕜 Help 🔹				
CM2000	Reports						
0	Þ- 🤤 Alerts						
<b>6</b>	D Sespoke						
Clients	D-G Client						
	schedul	ing					
Care Workers						) (J	Ô G⇒
Visits							
2							
Events							
Reports	Criteria						
	gency:	zzzWakefield Counci	From:	11/07/2023 - to: 11/07/2023 -	Preview		
<u> </u>	Cont. 11	(Al)	Period:	(Al) -	Email me		
Daily Planner	Client:	(AI)	User:	(Al) -	Schedule		
2	Care Worker:	(Al) -	Invoice Rate:	(A3) -			
Weekly	Location:	(Aš) 🔄	Client Branch:	(Al)			
Dianner	Team	(AB	Cart hun	121			

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."

M2000	Reports					
Clients Clients S Workers Wisits Visits Z Events	Scheduli     Gran     Gra	ng Worker Absence CSV (using Payable Worker Detailed Vist Plan Worker Detailed Vist Plan Worker Absence Worker Schedule (No Address) Worker Schedule (No Address) Worker Schedule (No Takis) Worker Schedule (No Takis) Worker Schedule (No Takis) Worker Schedule (No Takis) Worker Schedule Big Font Worker Schedule No PRI (Big Font) Worker Schedule No PRI (Big Font) Worker Torten) Worker Valt List Fer Clent Worker Valt List Fer Clent Worker Valt List Fer Clent Worker Valt List Step Report With No End Du t Service Step Report With No End Du				Carer Schedule Lists all the Tarmed visits that are allocal a Carer for a valected data range
Reports	Criteria for Care Agency: Contract: Client: Care Worker: Location: Team: Pay Category: Funder: Rota: Minimum Durat	Violar Schedule           [220:03:40:51 ] 7:04:00]           [AN]           (AN)	Period:     User:     User:     Invoice Rate:     Clent Branch:     Sort by:     Rota Shift:     Observation Category:     Observation Type:     Activity Category:	11/07/2023         •)         bit:         11/07/2023         •           (A0)         •         •         •         •         •           (A0)         •	Preview Emailme Schedule	1

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.

H 4 M 1 Dakin, Lynn Gascoine, Carol Milnes, Pauline	]/7 ∰ port		_		SAP CRYSTAL REPORTS*
Norton, Janice Taylor, Tina White, Alison (ginny)	Care Worker Sc	edule		Page 1 of	7
vinite, Alson (griny)	Agency: Client: Care Worker Contract:	zzzWakefield Training (All) (All) (All)	Date: Team: Status:	11/07/2023 to 11/07/2023 Reablement East Active	ש 1
	Details Form		-	Carcel	-
		Personal Care 19:00 0:40 Training, Tor Meal Pap Personal Care	n 61	Waterton Road, Wakefield, West Yorkphre, WF2 BHT	-
	Total Time:	20:00 0:30 Doe, John Medization Personal Care 1:40			-
	Total Visits:	1:40 3			
t Page No.: 1	Total	Page No.: 7		Zoom Factor: 100%	



## **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.

Visit Plan       Clent ID:       0226F6F0-7028-4298-A328-46787C4A0A20         Visit Plan (List View)       Right To Be Forgotten       CallConfirmLive!         Stops / Prefs       Address         Medical / Contacts       Line 1:       20 Sycamore Terrace         Line 2:       Line 2:         Line 3:       Line 3:         Town:       Normanton         County:       West Yorkshire	Close Active ( Basic Details Misc. Details Financial Observations / Warnings Alerts	Oo • <ul> <li>Name</li> <li>Title:</li> <li>Forename(s):</li> <li>Tom</li> <li>Surname:</li> <li>Test</li> <li>Known As:</li> <li>Name not known</li> <li>✓ Date of Birth:</li> <li>17/05/1990 •</li> </ul>	Agency: zzzWakefield Training   Agency: zzzWakefield Training   Originating Agency:  Contract: Reablement Training Contract   Branch: Reablement   Call Type: Aura	Refere
Line 2: Livin Livin Livin County: West Yorkshire Ethnic Origin:	Visit Plan (List View) Stops / Prefs Private Medical /	Right To Be Forgotten	CallConfirmLive!	nges cannot be
Post Code: WF6 2GG	Condus	Line 3: Town: Normanton	Livin Religion:	

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

E Ton	m Test - (In Use I se 🛛 🚨 Active		impson) 🍈 Navigator	Help			
	Basic Details Misc. Details Financial Observations / Warnings Alerts Visit Plan Visit Plan (List View)	Name	Title: Forename(s) Surname: Known As: Name not Ø Date of B Client ID: Right To I	Test known irth: 17/05/1990 v 0226F6F0-7028-4298-A328-46787C4A0A2	Agenc	Agency: zzzWakefield Training   Originating Agency: Contract: Reablement Training Contract  Branch: Reablement  Call Type: Aura	erence
	Stops / Prefs Private Medical / Contacts	Addres	Line 1: Line 2: Line 3: Town:	20 Sycamore Terrace	Person	The record is already in use by Scott Simpson. Any changes cannot be sonal Det Gene Mari Livin Religion: Ethnic Origin:	•
				3 at 13:44 by Scott Simpson /2023 at 10:37 by Scott Simpson			

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

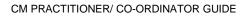
Clients	5								
Basic Ad	anced								
Agency:	zzzWakefield Training	Location:	(AI)	•	Find Now				
Contract:	(AI)	· Branch:	(AJ)	•	Reset				
Forename:		Telephone:							
ers Sumane:	Test								
Reference:									
Soc. Serv. I	Ref.:	PIN:							

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**.

ø	Restore			S Clients found. Row 4		
	Move					
	Size					
	Minimise					
	Magimise					
x	Close	Alt+F4				
5		- 77 I				

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.

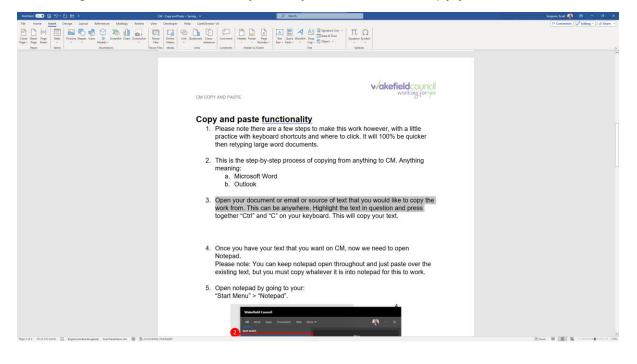
CallConfir	rmLive! - wakefield	1							
System -	🕤 Go 🔹 🗍 Actio	ons 🔹 🎒 Tools 🔹 🤱 St	atus: Active 🝷 🌢 Nav	vigator 🕜 Help 👻					T
CM2000	Clients								
	Basic Advanced	i .							
<b>a</b>	Agency: zzz	Wakefield Training	Location: (A	JI) -	Find Now				
Clients	Contract: (Al	0	▼ Branch: (A	ul) 🖛	Reset				
CM2000 Clients	Forename:		Telephone:		j				
Care Workers	Surname: Tes	st							
	Reference:								
	Soc. Serv. Ref.:		PIN:						
Visits	Agency	Name	PII Telephone	RTA	Location	Reference	Client Type	Soc. Serv. Ref.	Branch
	zzzWakefield Trainir	ng Test, Joanne	Not on Phone						Reablement
Events	zzzWakefield Trainin	ng Test, Michelle	01226 77777	7					Extra Care





## 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.



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**.

All Work Apps Documents \	Web Mo	re 🕶 🦣 …
Best match		
App		
Search work and web		Notepad
P notepad - See work and web results	>	Арр
∽ notepad++	>	
𝒫 notepad++ download	>	다 Open
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𝒫 notepad free	>	a desktop
,∽ notepad2	>	
	>	<ul> <li>log strings</li> <li>error log system chart migration 14-6-22</li> </ul>
𝒫 notepad	<u>⊒</u> i	📀 🚍 💁 🎼 🗷 🥥 🐖

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

*Untitled - Notepad				- 🗆	×	<
<u>File Edit Format View H</u> elp						
r source of text that you would like to copy the work from. This can be	anywhere. Highlig	ht the	text in questi	on and p	ress	$\sim$
<					>	
•	Ln 1, Col 156	100%	Windows (CRLF)	UTF-8		
	ch 1, cor 150	.0070	(CILE)	00		

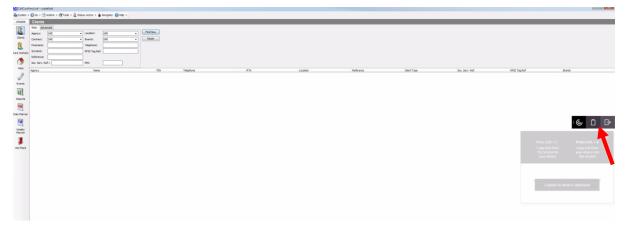


7. It does not matter if it is in one long sentence, this is ok. Now that we have pasted it inside of "**Notepad**" we now need to reselect all of it. You can do that by pressing "Ctrl" and "a" on your keyboard. This will select everything inside of the notepad document, so please ensure if this is the 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.

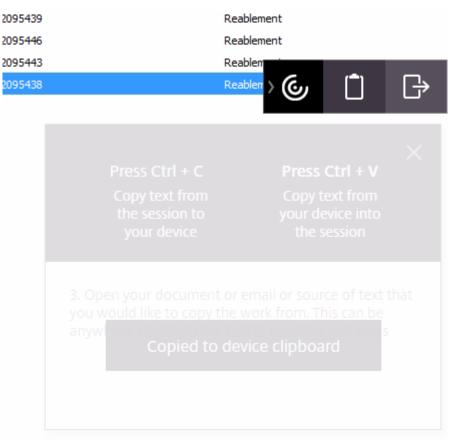
I *Untitled - Notepad	-		×	]
Eile Edit Format View Help				
r source of text that you would like to copy the work from. This can be anywhere. Highlight the text in ques	tion a	and pro	ess 🗠	1
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Ln 1, Col 156 100% Windows (CRLF)	UTF	F-8		ł

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).

Cm Client	Save 🗎 Close 🚨 🏾	New observatio	for Cm Client	
Basic Details Misc. Details Misc. Details Financial Devices Deservations / Warnings Alerts Wisit Plan	Observations This section : Date	Details Date: User: Categor Type: Priority: Summary Notes	D6/09/2023  at: 14:15  Cancel mmary Cancel mmary ar any personal identifiable information	
air Visit Plan (List View) Stops / Prefs Stops / Prefs Private Medical / Contacts	Warnings This section s Warning	Further Actions Assigned Do not e Close	Undo Cut Copy Paste	To 🕞

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

& Cm Client		<u>_</u>			
Save and Close	न Save 🗎 Close 🤱	New observation for (	2m Client	×	
Basic Details		Details Date:	D6/09/2023 ▼ at: 14:15 →	ОК	
Misc. Details		User:	Scott Simpson 1	Cancel	
Financial	Date	Category:		mmary	••
Devices		Type:	<b></b>		
Observations Warnings	<u>/</u>	Priority:	■		
Alerts		Summary:		_	
Visit Plan			y personal identifiable information		
Visit Plan (Lis View)	t Warnings	of text that you	n your document or email or source u would like to copy the work from. //where. Highlight the text in		
Stops / Prefs	Warning	question and p		Irning To	



## **CM Mobile**

- 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**

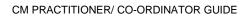
- To gain access to the CM Mobile app, please ensure you have updated your tablet, download Microsoft Authenticator, and have downloaded CM Mobile. All guidance is linked here: <u>CM – Tablet Setup guide</u>.
- 2. To receive your CM Mobile login, first you require training. Please talk to your manager, 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 you will be sent via an email from <b>Mobile</b> " and select " <b>Log Me</b>	m Hastl, open " <b>CM</b>	<sup>10:59</sup> <del>∕</del> Welco CM M	
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".	10:59 <b>୶</b> Welcome to CM Mobile		
	10:59 ACCESS	"CM Mobile" Wants to Use "hastl.com" to Sign In         This allows the app and website to share Information about you.         Cancel       Continue	Log M	le In
	Please enter your password  Please enter your password  Back Log in			

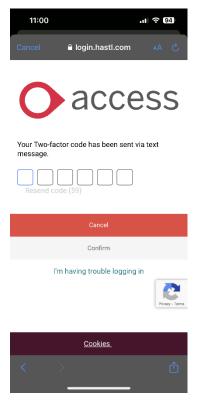
I'm having trouble logging in



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**".



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

- 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.
- 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 previsit 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**

 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.

11	:02				<b>''II                                  </b>	94)	
Menu		11 A	)23		11 Today		
Q Se	arch my	/ sched	lule				
Mon 7 Aug	Tue 8 Aug	Wed 9 Aug	Thu 10 Aug	Fri 11 Aug	Sat 12 Aug	Sorry,	
Cm Cli 4 Tas	ks					- 10:00 nin visit	
	more Ter ton, WF6				Over	due	
Double 10 Sycal	Cm Client       11:30 - 12:00            P Double up         D 2 Tasks         30min visit         10 Sycamore Terrace         Normanton, WF6 2GG						
						- 14:00 nin visit	
10 Syca	ent le up 🔲 ( I <b>more Te</b> r Iton, WF6	race				- 15:00 nin visit	
Try			e what yo <b>View Opt</b>		? 1 the men	u.	
						Hide History	
Т	ag histor	This is y is only	s your tag his maintaine	story d whilst	logged in		
<b>(</b> ) S	can QR		Press h	nere to	record	Visit	
		_					

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.

Cm Client	09:30 - 10:00 30min visit
10 Sycamore Terrace Normanton, WF6 2GG	Overdue

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

Cm Client	Planned 09:30 - 10:00
🖽 4 Tasks	Actual 11:05:
10 Sycamore Terrace	Incomplete
Normanton, WF6 2GG	incomplete

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.

Actual 11:05 - 11:10
Completed



## 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.

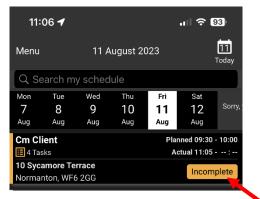


2. Please scan it only once, you will know it has worked when you get a big tick on your screen, including a green matching visit where the "**Scan QR**" button is located. You will also see a CC with a timestamp.

11	:05 🕇					3,
Menu		11 A	ugust 20	)23	1	11 <sup>T</sup> oday
Qs	earch m	ıy sched	ule			
Mon 7 Aug	Tue 8 Aug	Wed 9 Aug	Thu 10 Aug	Fri 11 Aug	Sat 12 Aug	Sorry,
-					09:30 - 30m Overc	in visit
10 Syc	lient ble up 🔢 amore Te	errace			11:30 - 30mi	12:00 in visit
					13:30 - 30m	14:00 in visit
10 Syc	lient ble up 🔢 camore Te	errace			14:30 - 30m	15:00 in visit
Tr			what yo View Opt		? I the menu	Ι.
						► Hide History
Tag History	CC 11:05					
	⊙ №	Aatching	g visit, p	lease	wait	
		_				

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.

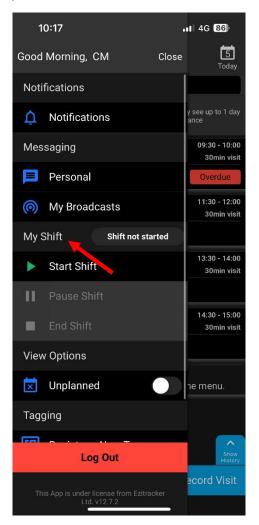


#### Menu

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**".
- 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**

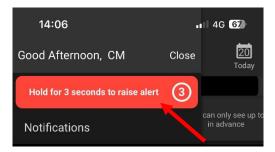
1. This is how you filter planned and unplanned visits you have done. This is not how to scan into an unplanned visit.



#### **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.

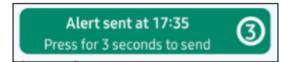
"Menu" > "How for 3 seconds to raise alert" > Hold for three seconds.



- 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.

You are offline. Click here to call 999 if in an Emergency.



## **Second Screen**

 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.

11:04 🕇	.11 🗢 93
Cm (	Client <b>Done</b>
Fri 11 August 11:3	0 - 12:00 (Planned)
Journal There are no new journal ent This client has no Outcomes Click to v	
Client Details	Access Notes
10 Sycamore Terrace	Click to view access details
Normanton, WF6 2GG	
Click tile to view all details	Click tile to view all access details
🗉 2 Tasks	🔁 Double up
Laundry	
Serve lunch	Cm Training One
Click tile to view all tasks and details	Click tile to view all details
em AR	🕼 Forms
Ef Medical	🛱 A Client Notes

## **Client Details**

1. This contains the clients phone number once selected.

#### Key Safe Number

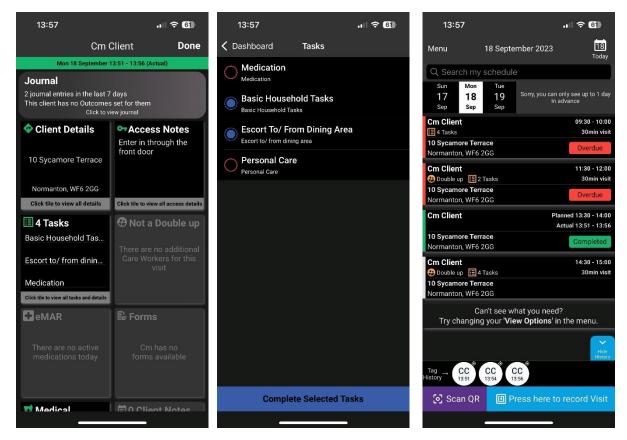
1. The key safe number is located inside of "Access Notes". Open this box and select "Key Safe Number".

CM PRACTITIONER/ CO-ORDINATOR GUIDE



## **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.



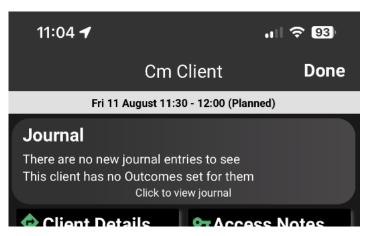
## **Journal Section**

### 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.



CM PRACTITIONER/ CO-ORDINATOR GUIDE

09:01		·II 令 99
<b>〈</b> Dashboard	Journal	
Q Search Journal		
17/10/2023 at 12:28		
📄 Visit Log		
1) Daily Records		
All tasks completed		
17/10/2023 at 10:41		
O Feedback		
Medication Concern	ns	
2 stock		
17/10/2023 at 10:28		
Feedback		
O Behavioural Concer	'n	
Practice one		
20/09/2023 at 12:53		
📄 Visit Log		
O Unknown Type		
All tasks completed		
+ Ad	ld a New I	Entry

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.



#### CM PRACTITIONER/ CO-ORDINATOR GUIDE

<b>09:53</b> ◀ Search		ul 🗢 89									
🗸 Journal	New Entry										
No journal type selected											
Journal Type	Please pick a	journal type >									
Entry Type	Please pick a	an entry type >									
Add note											
		0/1000									
	Save										
	Discard										

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:

	Reason 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.

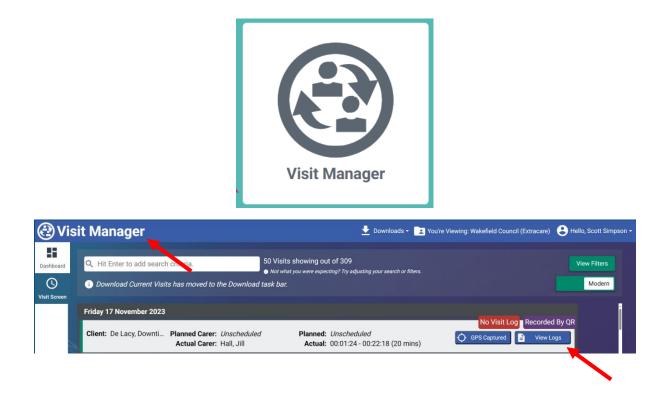
- can record what happened and why you were there. (Login and out via QR Code. Then select buzz call dropdown in the visit log. Record the details of the reason for the buzz call and action taken).
- 2. Updates to the visit log section can be viewed by practitioner/ co-ordinators and co-ordinators via the visit manger/ client manager section of the portal.



1 New Alert Out	tonding					ſ	Hide Banner	for E Mir
T New Alert Out	stanung						Hide bariner	
Q cm		Clients showing		sting your sea	rch or filters.			View
	<u>ت</u> ها ک	0	**	Ŕ	E~	Ð	۳	6
	Personal Devices	Feedback C	ontacts	Health	Forms	eMAR	Journal	Outco
Cm Client Act		earch criteria				ries showing are expecting? Tr	) out of 10 y adjusting your	search or
Address 10 Sycamore Terrac DOB (Not se				СТ				
Start 14/11/2023 Service End (Not set)	Daily I	-og		Creato	5			
Cm Client 1 Active	1) Daily Rec				-			
Address 6 Sycamore Terra DOB (Not set)	all tasks co	npieted			_			



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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:

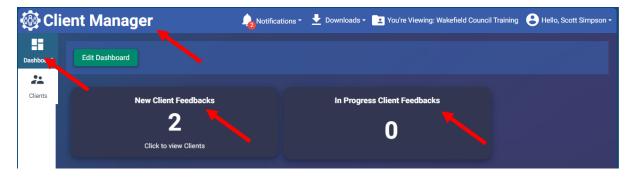
	<u>Reason</u> If an accident occurs, then you can log it here.
Behavioural Concern	If there is a behavioural concern either with the client or in the vicinity of the client.
Complaints and Compliments	If the client has any.
Dietary Concern	If there are issues with foods or diet.
Environmental Concern	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.
- 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).

CM PRACTITIONER/ CO-ORDINATOR GUIDE



- 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.

🚳 Cli	ent Manager		🛨 Downloads - 💽 Y
Dashboard	Edit Dashboard	Client Feedback (2) Open To-Do List	

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

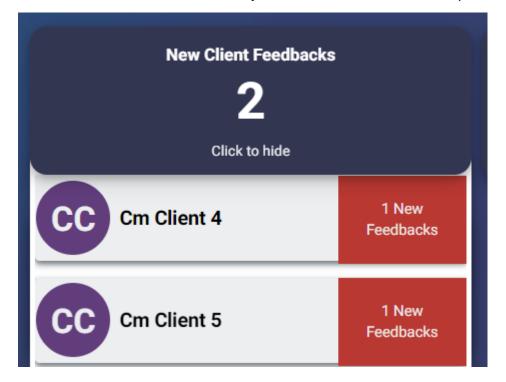




- 10. It is hard to miss when a client feedback entry is made towards a particular client. Client feedback is to notify you that you may need to do something to assist or for your awareness.
- 11. When you receive an alert, select it from **Notifications** or **Clients** they both will look the same.

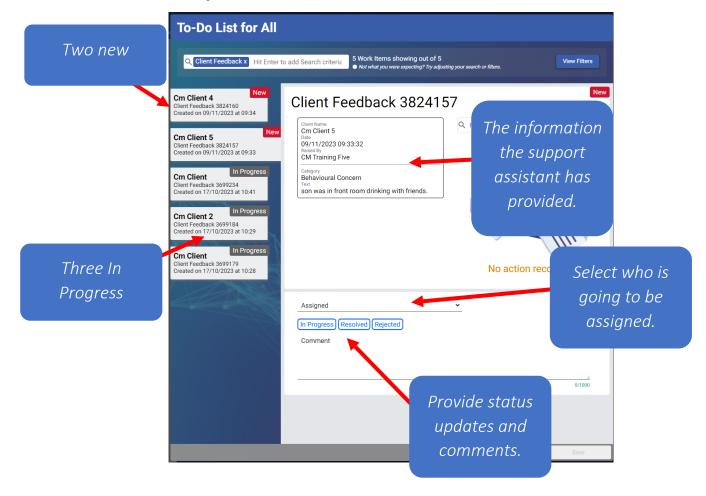
To-Do List for All		
Client Feedback x Hit Enter to add Search c	5 Work Items showing out of 5 ● Not what you were expecting? Try adjusting your search	or filters.
Cm Client 4 Client Feedback 3824160 Created on 09/11/2023 at 09:34	Cm Client 5 Client Feedback 3824157 Created on 09/11/2023 at 09:33	
Cm Client Client Feedback 3699234 Created on 17/10/2023 at 10:41	Cm Client 2 Client Feedback 3699184 Created on 17/10/2023 at 10:29	
Cm Client Client Feedback 3699179 Created on 17/10/2023 at 10:28		

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.





CM PRACTITIONER/ CO-ORDINATOR GUIDE

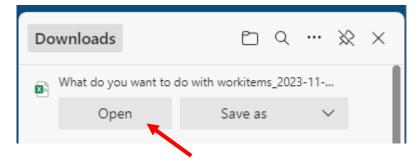
#### Current workloads of assigned client feedback

- 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.**

Notifications - 🛨	Downloads 🕶
Downloads	X Close
Please configure download	your
Download Type To-Do List Details	~
From Date 01/08/2023	æ
To Date 09/11/2023	Ħ
Clients	~
Locations	~
	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**.



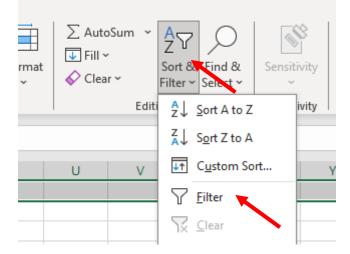
4. This will provide you with an excel spreadsheet with all current assigned client feedback. Increase the size of I and J column.

	Α	В	С	D	E	F	G	н	1	L	к	L	м	N	0	Р
1	Workitem	Client Na	Raised By	Raised On	Туре	Header	Category	Details	Current Status	Currently Assigned User	Comment Created	Comment	Comment			
2	d5497cf3-	Cm Client	CM Traini	******	ClientFee	edback	Behaviou	son was ir	InProgress	Scott Simpson	Scott Simpson	*****	I have ask	ed if we co	ould	
3	d6fd3ea0-	Andrew J	Pete King	*****	ClientFee	edback	Accident,	test	Resolved	Rac of Scargill	Scott Simpson	*****	D			
4	28531e8c-	Cm Client	CM Traini	******	ClientFee	edback	Dietary Co	client is n	New							
5	947bbe82	Cm Client	CM Traini	*****	ClientFee	edback	Medicatio	2 stock	InProgress	Rebecca Humphries	Scott Simpson	****	Rallocated	1		
5	947bbe82	Cm Client	CM Traini	*****	ClientFee	edback	Medicatio	2 stock	InProgress	Rebecca Humphries	Scott Simpson	****	Need to p	ick up mor	e	
7	d4ec94a1-	Cm Client	CM Traini	*****	ClientFee	edback	Behaviou	practice o	InProgress	Rebecca Humphries	Scott Simpson	*****	Trail			
8	d4ec94a1-	Cm Client	CM Traini	******	ClientFee	edback	Behaviou	practice o	InProgress	Rebecca Humphries	Scott Simpson	*****	Accident f	orm		
9	19a83999-	Cm Client	CM Traini	******	ClientFee	edback	Accident,	fallen ove	InProgress	Rebecca Humphries	Rebecca Humphrie	*****	accident f	orm compl	leted	
10	d4ec94a1-	Cm Client	CM Traini	*****	ClientFee	edback	Behaviou	practice o	InProgress	Rebecca Humphries	Scott Simpson	*****	Accident f	orm		

5. Highlight the 1<sup>st</sup> row. By selecting number 1 on the left-hand side.

1	А	В	С	D	E	F	G	Н		J	К	L	М	N	0
1	Workiten	n Client Nar	Raised By	Raised On	Туре	Header	Category	Details	Current Status	Currently Assigned User	Comment Created	Comment	Comment		
2	d5497cf3-	Cm Client	CM Traini	: #########	ClientFee	dback	Behaviou	son was ir	InProgress	Scott Simpson	Scott Simpson	*****	I have ask	ed if we co	uld
2	defdagoo	Androw I	Data Vina		ClientFor	dhadr	Assidant	++	Decolued	Bachal Conraill	Contt Cimpson		n		

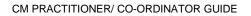
6. Then go to "Filter". Under "home", "editing", "sort & filter", "filter". This will ensure the headers are now filterable to find all under a certain Support Assistant.



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

	J		
- Curr	ently Assigned User	•	C
Ź↓	Sort A to Z		So
Z↓	S <u>o</u> rt Z to A		So
1	Sor <u>t</u> by Color	۲	So
	Sheet <u>V</u> iew	ŀ	So So
	<u>C</u> lear Filter From "Currently Assigne"		So Re
	Filter by Color	ŀ	So
-	Text <u>F</u> ilters	۲	P
	Search		
	<ul> <li> ♥ (Select All)</li> <li> ♥ Rachel Scargill</li> <li> ♥ Rebecca Humphries</li> <li> ♥ Scott Simpson</li> <li> ♥ (Blacks)</li> </ul>		

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**

- 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**.

lient Manager										
9 Q. cm		11 Clients showing out of 89 • Not what you were expecting? Try adjusting your search or								View Filters
	Personal	LoD Devices	O Feedback	Contacts	<b>於</b> Health	<b>≣</b> ∽ Forms	eMAR	Journal Outcome	3	
Cm Client Address 10 Sycamore Terrace WF6 2 DOB (Not set)	tive 올 Statu	IS			_				$\mathbf{\mathbf{h}}$	Show
Service Start (Not set) Service End (Not set) Cm Client 1 Active								•		
Address 6 Sycamore Terrace WF6 DOB (Not set) Service Start (Not set) Service End (Not set)							can't find les for th	d any his client		
Cm Client 2 Active Address Aberford Road WF1 4DG DOB (Not set) Service Start (Not set)										
Service End (Not set) Cm Client 3 Active	k.									
Address Wakefield One WF1 2EB DOB (Not set) Service Start (Not set) Service End (Not set)	2									
Cm Client 4 Active Address 10 Sycamore Terrace WF6 DOB (Not set) Service Start (Not set)										
Service Start (Not set) Service End (Not set)		_	_		_	_	_			

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.

2	≗ Status		Show
	Active	Title Description	
		Start Date: _dd/mm/yyyy 🖻 End Date: _dd/mm/yyyy 🗟 Discard Outcome Save O	utcome



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 N	eeds and Goals	
General Information about me			
Spiritual and Cultural Needs			
Support Networks			
Areas of care and support - Personal Cares	Washing/Bathing/Showering/F	<sup>D</sup> ersonal Grooming/Dental Hygiene	
	Current Ability	Goals/Comments	
			0
	Continence Care		
	Current Ability	Goals/Comments	
	P		
	Dressing and Undressing	1. 1.7	

٨



- 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.

support - Personal Cares	Current Ability	Goals
	I will require full assistance with my personal care needs.	To hopefully get my independence back once the pain to my knee subsides
	10/01/2024 I am independent with washing my top half and <u>below</u> Assistants have been supporting with washing my back, bottom and lower <u>legs</u>	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.
		12.1.24 Shower board been provided to support lan to shower, only sat no standing

a. As an example. Here we have an PSP.



Current Ability	Goals
I am aware when I require the toilet to 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	
Zimmer frame. Although it takes me	ime 12.1.24 Issued with a glide about commode that can be used over the <u>toilet</u>
17/01/2024 I am using a urinal to pass <u>urine</u> , assistants have been emptying this f me. I have a glide commode which h been issued I am using this as I am unable to go into the toilet safely usin my <u>frame</u>	use the toilet by placing me and the commode over the toilet, this allows me
Dressing and Undressing	
Current Ability I will require full assistance at presen dress/undress.	Goals           t to         To hopefully get my independence back once the pain to my knee subsides
10/01/2024 I am independent with dressing my to half, I require support with putting my trousers/pants over my feet, I am independent with pulling my trousers once over my feet.	care and in time want to regain the abilit to dress independently, to do this I

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

Person	LoD al Devices	O Feedback	Contacts	<b>於</b> Health	Er Forms	<b>e</b> MAR	<b>F</b> Journal	Outcomes		
	atus									
Ad	ditional Comm	ients:			Active	Perso	nal Care		Active	

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

Cares	Current Ability	Goals
	I will require full assistance with my personal care needs.	To hopefully get my independence back once the pain to my knee subsides
	10/01/2024 I am independent with washing my top half and <u>below</u> Assistants have been supporting with washing my back, bottom and lower <u>legs</u>	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.
		12.1.24 Shower board been provided to support lan to shower, only sat no <u>standing</u>

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.

Additional Comments:	Title Personal Care Description I will require full assistance with my personal care needs.
Personal Care	Start Date: 15/03/2024 🖻 End Date: dd/mm/yyyy 🖻 Discard Outcome Save Outcome
	Add Progression Note



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".* 

온 Status	Show
Additional Comments:	Additional Comments:       Edit Outcome       Close Outcome         Please input any comments or observation relating to today's visit, which are not covered in the outcomes.       Start Date: 17/01/2024 End Date: (Not set)
Personal Care	Add Progression Note
Active	2

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.

I	Areas of care and	Washing/Bathing/Showering/Personal Groo	oming/Dental Hygiene	
	support - Personal Cares	Current Ability	Goals/Comments	You can see that the PSP area is Personal Care,
		Continence Care		Continence Care.
		Current Ability	Goals/Comments	
		I need full assistance with continence needs as I wear pads and require care staff to check and change this on all toilet visits.	At this time, I need all out on the bed.	cares to carried
		Dressing and Undressing		
	This is how it :	Current Ability	Goals	You can see the current ability and goals/ comments
2.	I his is now it v	will look inside of CM.		have been copied
≗ Stati	us			into the description.
Addition	nal Comments:	Personal Care I will require full assistance with continence needs-a on all toilet visits. At this time, I need all care to carri		
Persona	al Care	Start Date: 15/03/2024 End Date: (Not set) Add Progression Note		

- 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)

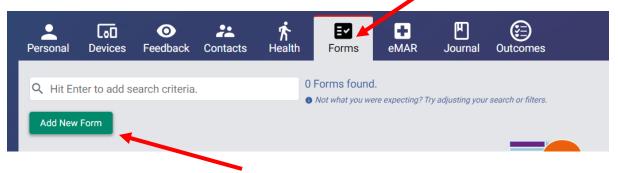
## Forms

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.

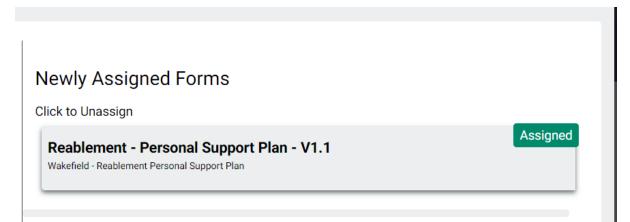
Typically, you want to tether your phone to your laptop data when complete visits. If you do not get 4G where you are, please follow the <u>Import Form (Offline Mode)</u> section.

### 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**.



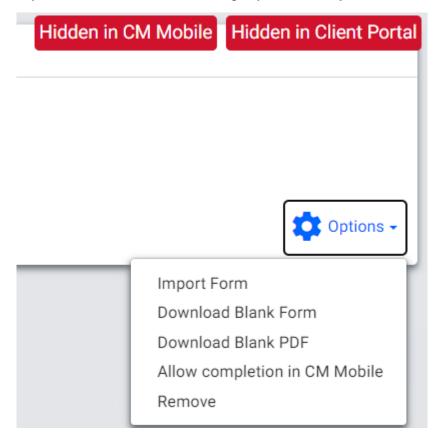


You can add multiple forms at the same time. This screen will provide you with an overview of which forms you are adding. If you are happy with your choice, select **Complete**. If not, please select **Previous** and choose another form. Once **Completed**, you will now see the forms that have been attached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

Personal	<b>Lo</b> Devices	O Feedback	Contacts	<b>於</b> Health	E <b>r</b> Forms	eMAR	<b>الل</b> Journal	Outcomes	:						
Q Hit E	_	earch criteria			Form found. Not what you we		ry adjusting your	search or filters.	L						
		ersonal Sup Personal Support	port Plan - Plan	V1.1								Hidden in CM Mobil	e Hidd	en in Client	Portal
	in the prm														
														💠 Optio	ns +

### **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.

ersonal Devices Feedback Contacts Health Forms eMAR Journal Outcomes			
A Hit Enter to add search criteria.     I Form found.     Mot what you were expecting? Try adjusting your search or filters.			
Add New Form			
Reablement - Personal Support Plan - V1.1 Wakefield - Reablement Personal Support Plan		Hidden in C	CM Mobile Hidden in Client Portal
Fill in the form			
			🔅 Options -
▲ CaO			
Reablement - Personal Support Plan - V1	.1		
Watefield Council Working for you			
Clients Details - Page 1			
Please fill out all mandatory questions marked with an * and answer any without to best of your knowledge.			
Aims of the Services – Reablement / Hospital to Home, Emergency Visits The service we provide is a reablement service which aims to work with you to encourage and motivate you to rebuild confide	an connect the development of daily foring all	ills and ecomote and ratain as much induced	energiance as possible. There will be no
initial charge for this service but once you have reached your optimum level, a review will be held to discuss your long term ne			
provider is identified but you will be charged for the reablement service from the date of the review.			
Aims of the Services - Reablement/ Frickley Mews			h.
The service we provide is a reablement service which aims to work with you to encourage and motivate you to rebuild confident			
initial charge for this service but once you have reached your optimum level, a review will be held to discuss your long-term ne provider is identified but you will be charged for the reablement service from the date of the review.	eds. If long term support is discussed and agr	eed the reablement service will continue	to provide support until an alternative
Alms of Service for Bridging			lê.
The bridging service will provide care and support to maintain your current daily living skills and Care needs until an alternative	e care provider commences. There will be a ch	arge for the bridging service from the da	te service started in line with Wakefield
	Save as Draft	Save	Return To Forms

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.** 

ersonal	Lo <b>D</b> Devices	<b>O</b> Feedback	Contacts	<b>济</b> Health	E <b>r</b> Forms	eMAR	<b>لا</b> Journal	Outcomes	
Complet	ted By - Print	Name: *							
Scott S	Simpson								
Complet	Are	datin	g Cliei u want to ove			Reablement	t - Personal S Cancel	Support Plan - V1.1 Save and Replace	]
Date of	Signature *								
26/01,	/2024								
Feedbac	k								

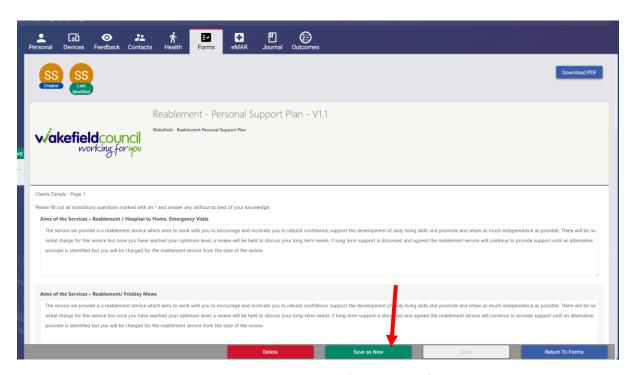
### **Saved Forms**

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

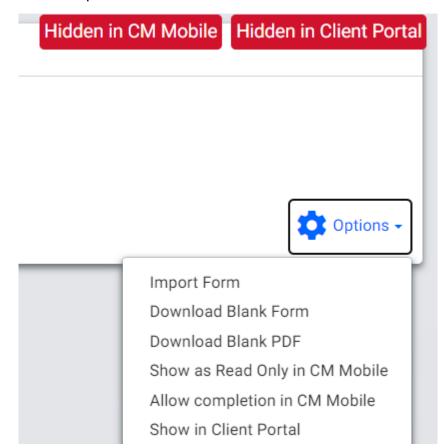
Personal	LoD Devices	O Feedback	Contacts	<b>於</b> Health	E <b>r</b> Forms	eMAR	<b>F</b> Journal	0utcomes	
		ersonal Sup	port Plan - Plan	V1.1					Hidden in CM Mobile Hidden in Client Portal
Fill ir for	26th	ord for January 0:24							
									💸 Options -

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.





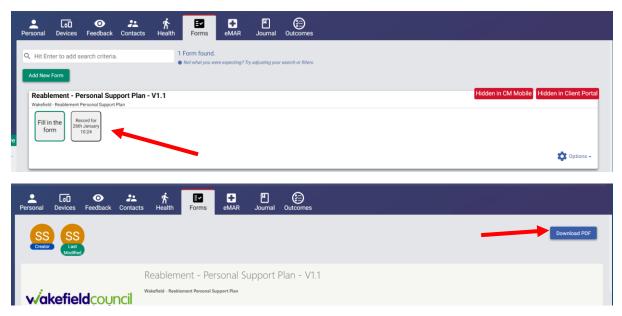
The options are shown as:

<u>Option</u> Import Form	<u>Use</u> 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	This will show the most recent saved form to
Mobile	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**

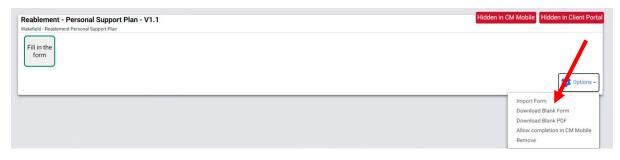
If you have attached the form by mistake, you can delete it off the record. Simply, open the form that you need deleting on the **Forms** tab of **Client Manager**. Then at the bottom of the screen, there will be a big red button saying **Delete**.

Personal Devices Feedback Contacts Health Forms eMAR Journal Outcomes					
Down	nload PDF				
Reablement - Personal Support Plan - V1.1					
Wakefield Council working for you					
Clients Details - Page 1					
Please fill out all mandatory questions marked with an * and answer any without to best of your knowledge.					
Aims of the Services – Reablement / Hospital to Home, Emergency Visits					
The service we provide is a reablement service which aims to work with you to encourage and motivate you to rebuild confidence, support the development of daily living skills and promote and retain as much independence as possible. There will be no initial charge for this service but once you have reached your optimum level, a review will be held to discuss your long term needs. If long term support is discussed and agreed the reablement service will continue to provide support until an alternative provider is identified but you will be charged for the reablement service from the date of the review.					
Aims of the Services - Reablement/ Frickley Mews					
The service we provide is a reablement service which aims to work with you to encourage and motivate you to rebuild confidence, support the development of daily living skills and promote and retain as much independence as possible. There	will be no				
initial charge for this service but once you have reached your optimum level, a review will be held to discuss your ong-term needs. If long term support is discussed and agreed the reablement service will continue to provide support until an alternative					
provider is identified but you will be charged for the reablement service from the date of the review.					
Delete Save as New Save	orms				

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 <u>adultssystemsupport@wakefield.gov.uk</u> with the form, client and issue you are having.

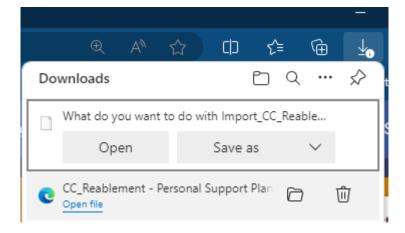
### Import Form (Offline Mode)

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.

	What do you want to do with import_CC_Rable. Open Save as
Reablement - Personal Support Plan - V1.1 Watefieldcouncil working-for you	Contractions of payment files = 11 (2014)     Contract Contrest Contract Contract Contract Contract Contrest Contract Contre
Your answers have been saved as a new file (JSON). Please use the new file to impor file starts with the word 'import' and is saved in your default b	



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**.

C Open			-		- -		×				
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H Drive	Name	Status	Date modified	Туре	Size						
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Datastore (G:)											
	me: Import_CC_Reablement Personal Support Pla	an 2023-11-15	143948.json		✓ All files		~	1 Form found.			
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Service End (Not set)					Im	nort	a C	completed Fo	nm		
Cm Client 1			Active	Reablemen	t- ''''	port	u U	ompicteure	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
Address 6 Sycamore To		Wakefield - Reable	eme Ple	ase use this	scree	en to import any Form you h	ave comple	ted offline.			
Service Start (Not set)											
Service End (Not set)				Fill in the form				e' to find the file that was ge have been created in the def			
			Antin	Ionn				prefixed with 'import_'	ault browse	er download	location
Cm Client 2	DOD (111		Active					SON file type			
Address Aberford Road	J WF1 4DG DOB (Not set)							sort no type			
Service Start (Not set)						noose File	No file	chocon			
Service End (Not set)						loose File	NO IIIE	e chusen			
Cm Client 3			Active							Cancel	Import File
Address Wakefield One	WF1 2EB DOB (Not set)										

# Import a Completed Form

Please use this screen to import any Form you have completed offline.

- Use 'Choose File' to find the file that was generated when you completed the form
- This file would have been created in the default browser download location
- This file will be prefixed with 'import\_'
- This will be a JSON file type

Choose File Import\_CC\_Reablement Personal S...port Plan\_2023-11-15 143948.json





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.

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Completed By - Signature: *		
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×		
Date of Signature *		
26/01/2024		
Feedback Please show this to the client but not completed during the pre-vis	sit	
		nent about our service via this link www.cqc.org.uk/give-feedback-on-care
You can get help with this form if it's hard for you to do things o		
Telephone: 03000 616161 Monday to Friday, 8.30am to 5.30pm	excluding bank holidays	
		10
Prompt		
Send a broadcast message to inform staff when a PSP has been	created/amended	
	Charles and an and a second	A.
		Previous Next
		Previous Next



## **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 <u>eForms</u> or through email <u>adultssystemsupport@wakefield.gov.uk</u> 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	Change	Author	Date
V1	INITIAL START	SS	11/07/2023
V1.1	Changes:	SS	19/07/2023
	<ul> <li>CM2000 is now CM.</li> </ul>		
	- Grammatical and		
	readability changes.		
V1.2	Changes:	SS	18/09/2023
	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.		
V1.3	Included an Access section Added exclusions	SS	20/00/2022
V1.3 V1.4		SS	20/09/2023
V1.4 V1.5	Added panic button alerts	SS	25/09/2023 03/10/2023
V1.5	Correct unplanned visits section. Included visits.	- 55	03/10/2023
	Included events		
V1.6	Changed to suit practitioners only.	SS	01/11/2023
V1.0	Added in how they would receive an email when	00	01/11/2023
	first created.		
	Added in CallConfirmLive! section separately.		
	Added in CM Mobile section separately.		
	Added in Portal section separately.		
	Added copy and paste section		
V1.7	Added Client feedback and client feedback	SS	09/11/2023
	managers section		
V1.8	Added in a journal section.	SS	17/11/2023
	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-		
14.0	Ordinator's	00	04/44/0000
V1.9	Added another FAQ.	SS	21/11/2023
	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.		
V2.0	Changed the language for the outcome	SS	04/01/2024
V 2.0	progression note section to make clearer.		51/01/2024
V2.1	Added forms section.	SS	26/01/2024

## **Version Control**



		Removed a few FAQ's and put relevant ones for practitioners/ co.		
V2	2.2	Change outcomes options.	SS	1503/2024