



Admin

Document	Admin guidance for CM
Purpose	Role specific guide focusing on what an admin will do on CM
Version	V1.1
Owner	ICT Business Transformation Team / Adults System Support
Last Updated	20/07/2023

Contents

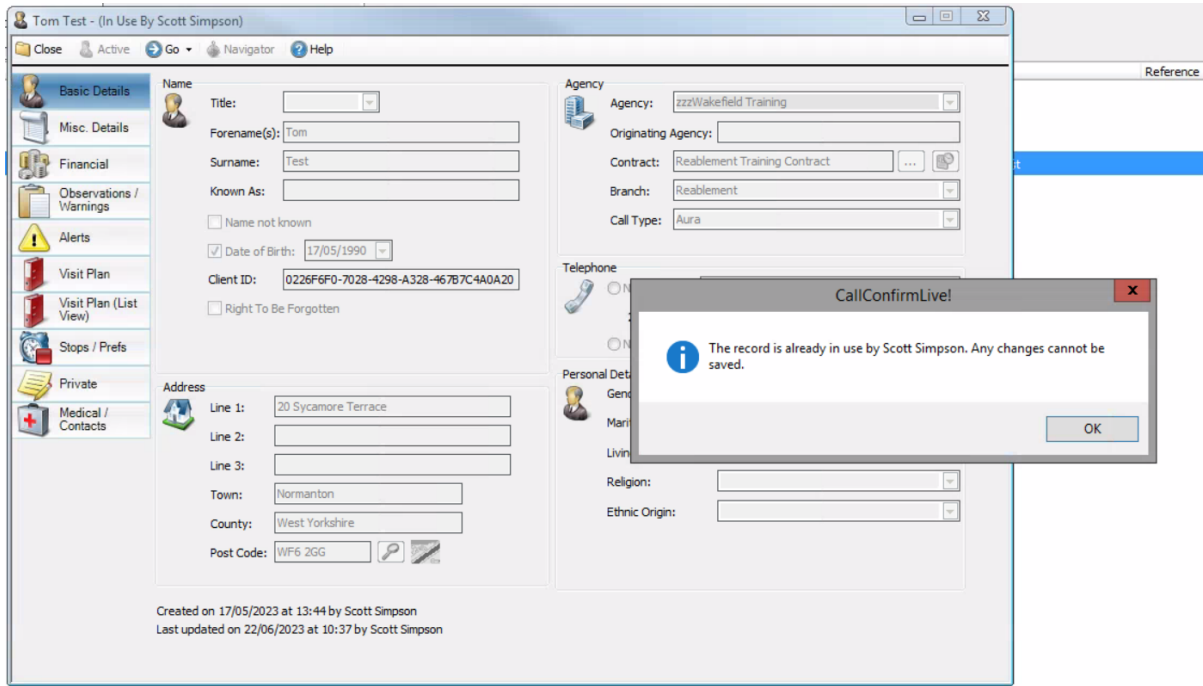
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Purpose of the guide

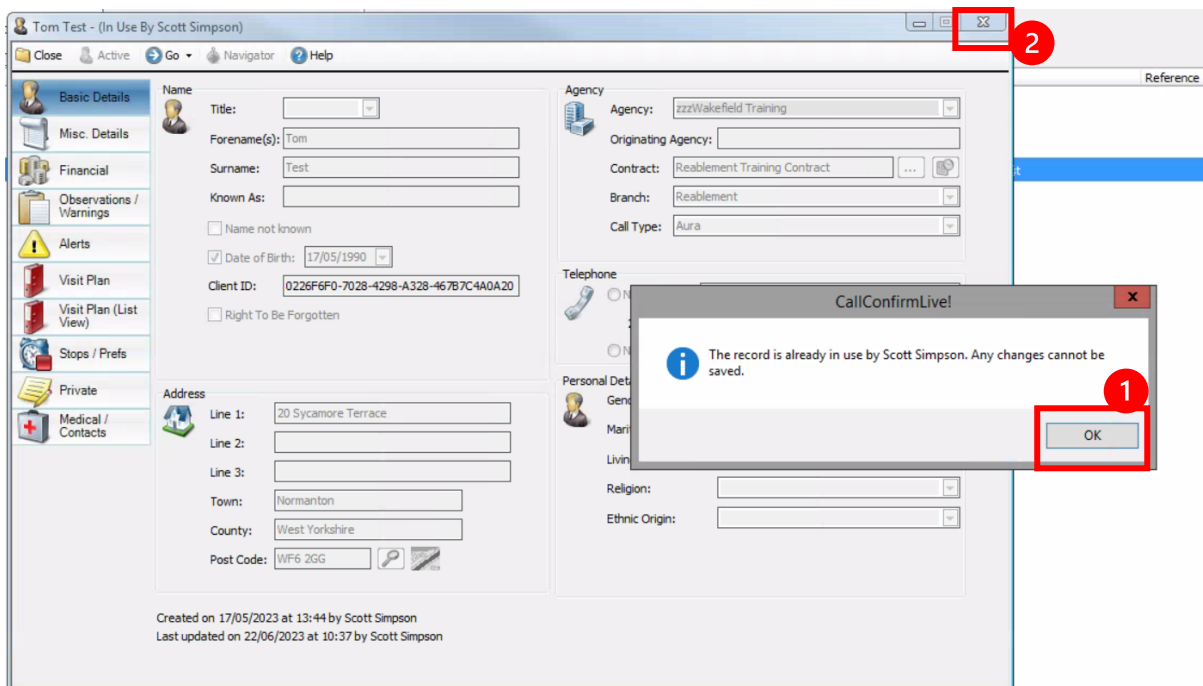
1. There are four separate roles on CM – Scheduler (Planner), Practitioner, Admin and Carer. This guide is for those in the admin role. I will be covering the process behind CM and what both reablement and extra will need to do.
2. If at any point you require support:
 - a. Ask your superusers and your 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](#)

Disappearing windows

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



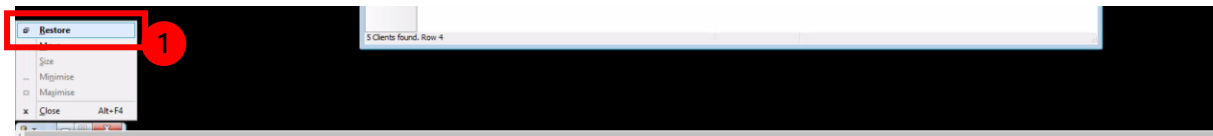
2. To rectify the situation. Select "Ok" on the error and press the "X" on the top right of the greyed-out window.



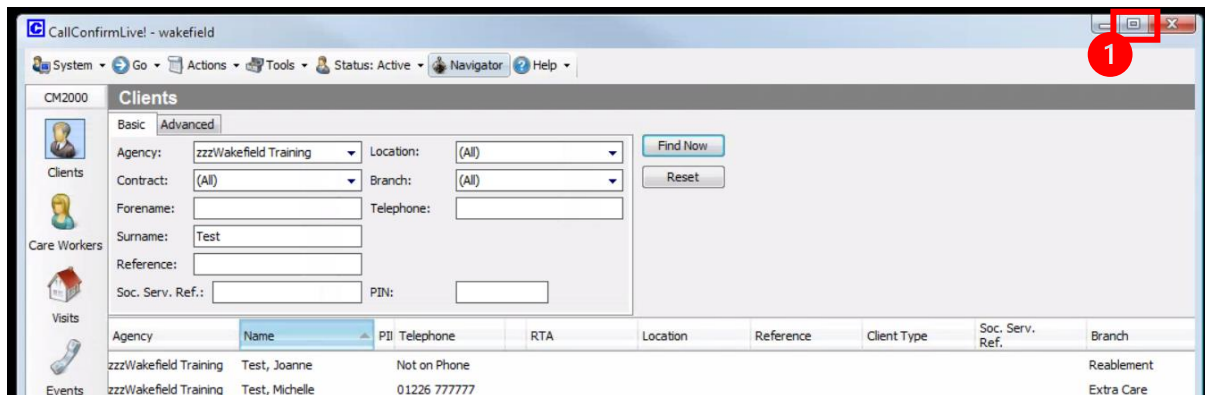
3. After closing the window, go to the top right, and select the box button.



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

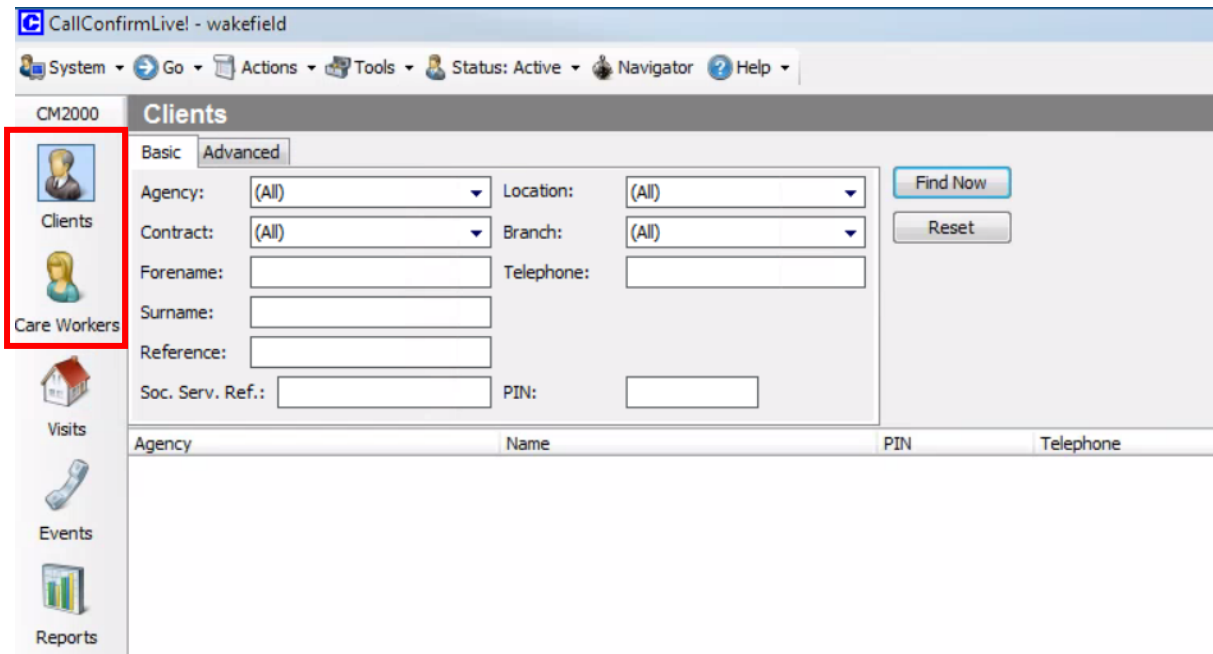


5. The window, which disappeared, will now be bigger. Complete what you need to and when you "Save and Close" go the original window you made smaller and select the box icon again to make larger.

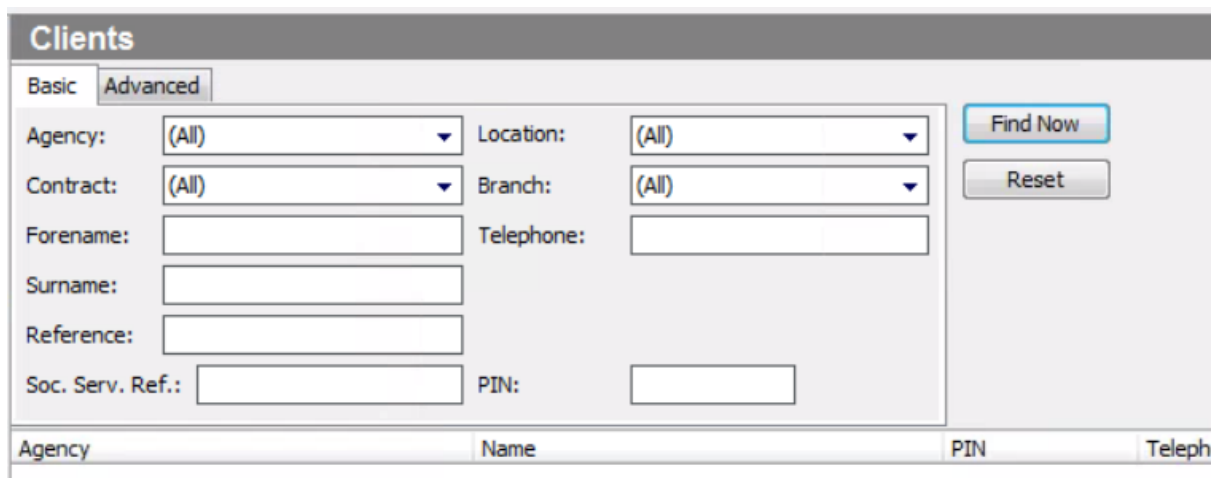


Search

1. The search functionality repeats itself throughout searching for clients and carers on the system.
2. Select either “client” or “care workers” from the left toolbar.



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



4. Double left-click the entry from the list below.

Clients

Basic | Advanced

Agency: zzzwakefield Training Location: (All) Find New
 Contract: (All) Branch: (All) Reset

Forename: Telephone:

Surname:

Reference:

Soc. Serv. Ref.: PIN:

Agency	Name	PII	Telephone	RTA	Location	Reference	Client Type	Soc. Serv. Ref.	Branch
zzzwakefield Training	Archer, Ken		01924 375327						Extra Care
zzzwakefield Training	Armstrong, Ivor		01924 257631		Extra Care Sherwood				Extra Care
zzzwakefield Training	Atkinson, Miroslav	7969	Not on Phone	⚠ 15 mins	Reablement East				Reablement
zzzwakefield Training	Beards, Karen		Not on Phone						Extra
zzzwakefield Training	Briggs, Leah		Not on Phone						Extra
zzzwakefield Training	Broadbent, Marjorie		Not on Phone		Extra Care Sherwood				Extra
zzzwakefield Training	Bronley, Michael		01924 768464		Extra Care Sherwood				Extra
zzzwakefield Training	Brown, Bob	0008	12345 678910						Extra Care

Viewing Visit Plans

Client record

Basic Details

1. After searching for a client, you will automatically open “Basic Details”. Here you can see the client (service user) address and contact information.

Tom Test

Save and Close Save Close Active Go Navigator Help

Name

Title: []

Forename(s): Tom

Surname: Test

Known As: []

Name not known

Date of Birth: 17/05/1990

Client ID: 0226F6F0-7028-4298-A328-467B7C4A0A20

Right To Be Forgotten

Agency

Agency: zzzWakefield Training

Originating Agency: []

Contract: Reablement Training Contract

Branch: Reablement

Call Type: Aura

Telephone

Number: []

2nd Number: []

Not known Not on phone

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: []

Created on 17/05/2023 at 13:44 by Scott Simpson
Last updated on 11/07/2023 at 10:23 by Scott Simpson

Misc. Details

1. Select “Misc Details” on the left-hand side, to view the Key Safe Number and access information. This may be required to provide to a carer to gain access into the property.

Tom Test

Save and Close Save Close Active Go Navigator Help

Misc. Settings

PIN: [] <- Assign

Reference: []

Keysafe Number: 1234

Access Notes: Back door

Email Address: []

Care Manager: []

Property Type: []

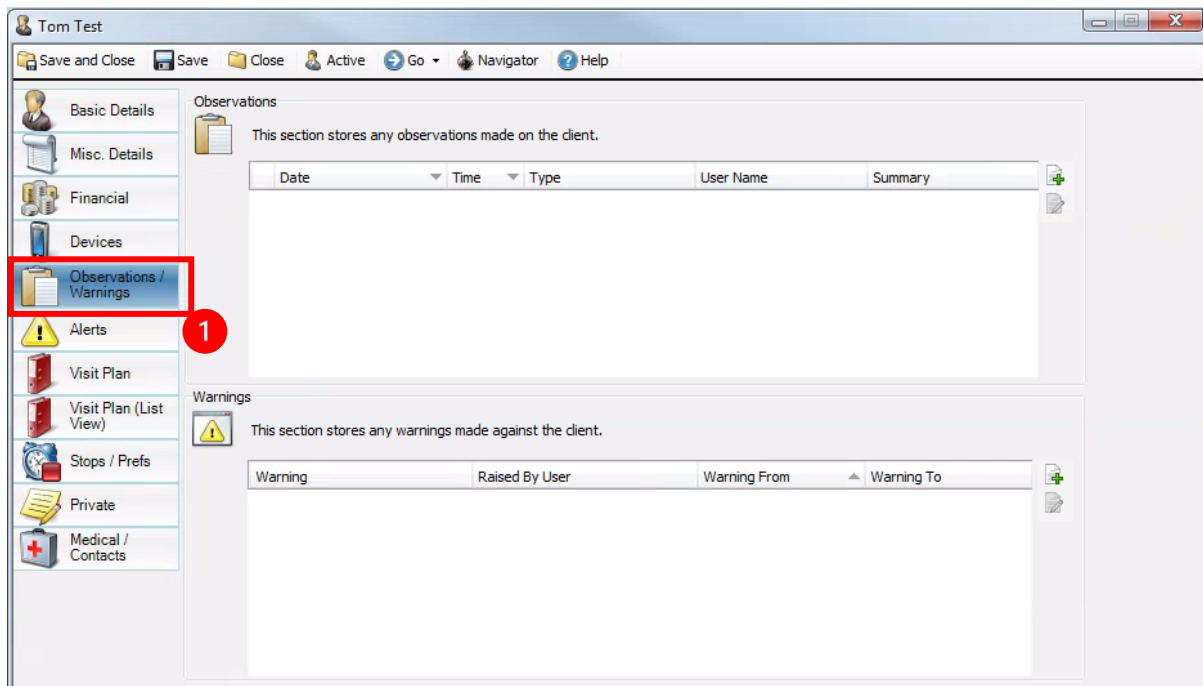
Use of Telephone: Yes (Assumed)

Notes

Note Description	From	To	Display
Continuity of Care Analysis since 20/05/2023			
Carer		Visits	

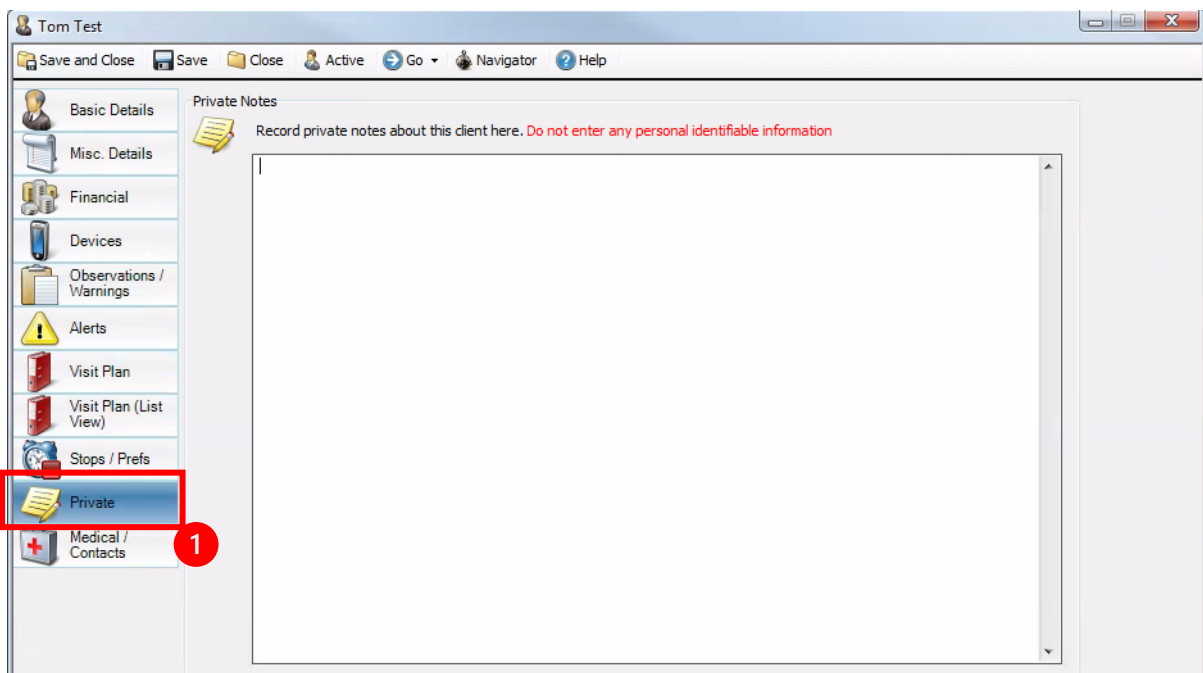
Observations/ Warnings

1. There may be warnings you need to inform the carer to be on the lookout for under the tab "Observations/ Warnings" tab.



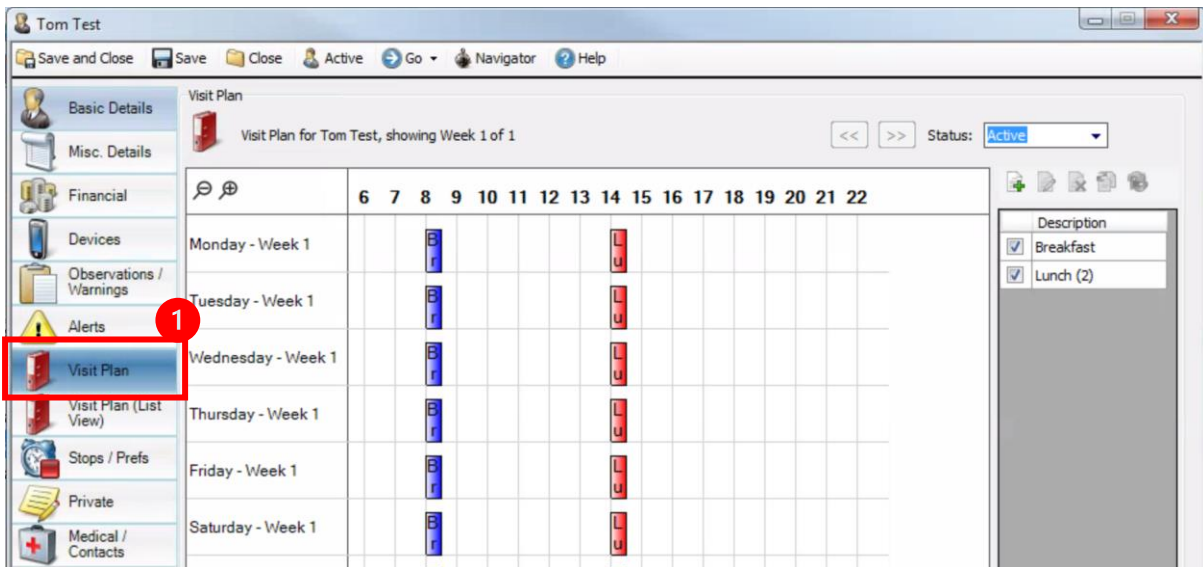
Private

1. This acts as the contact journal, information here may be applicable to share with the carer when conducting a home visit.

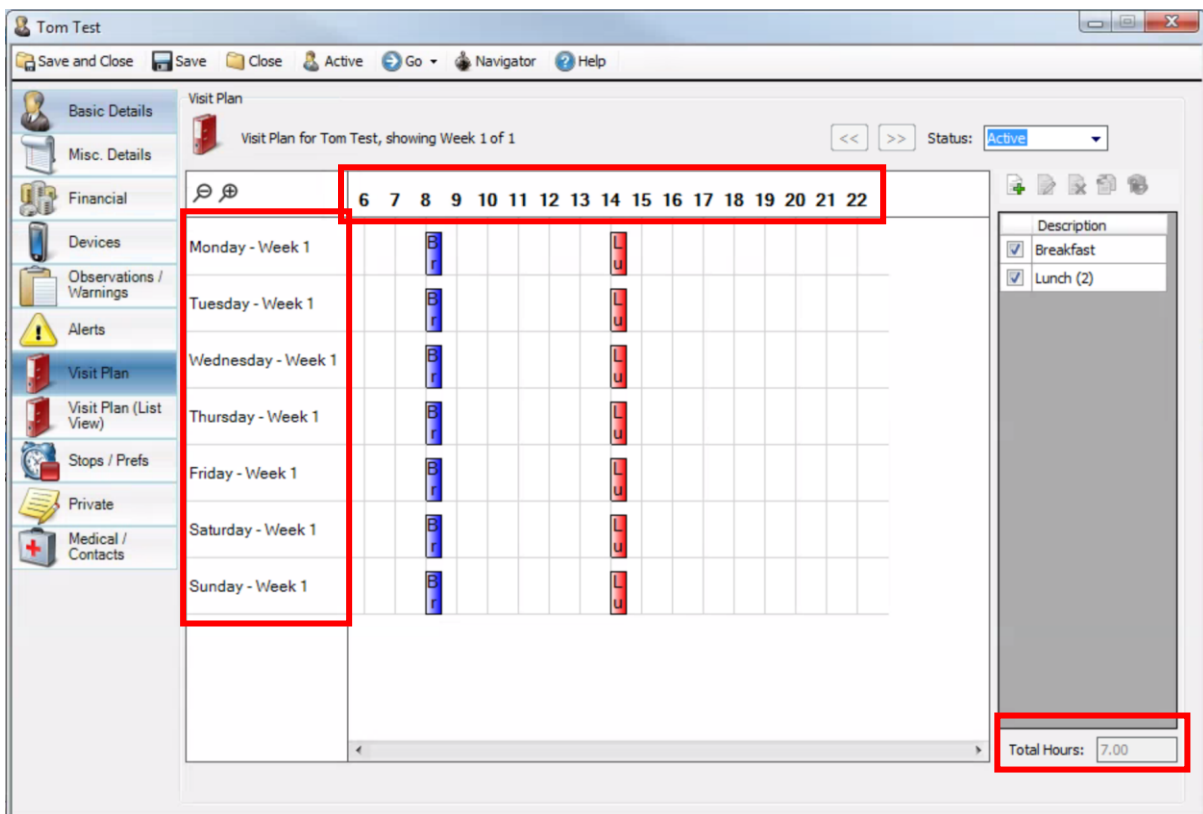


Visit Plan (Total Hours)

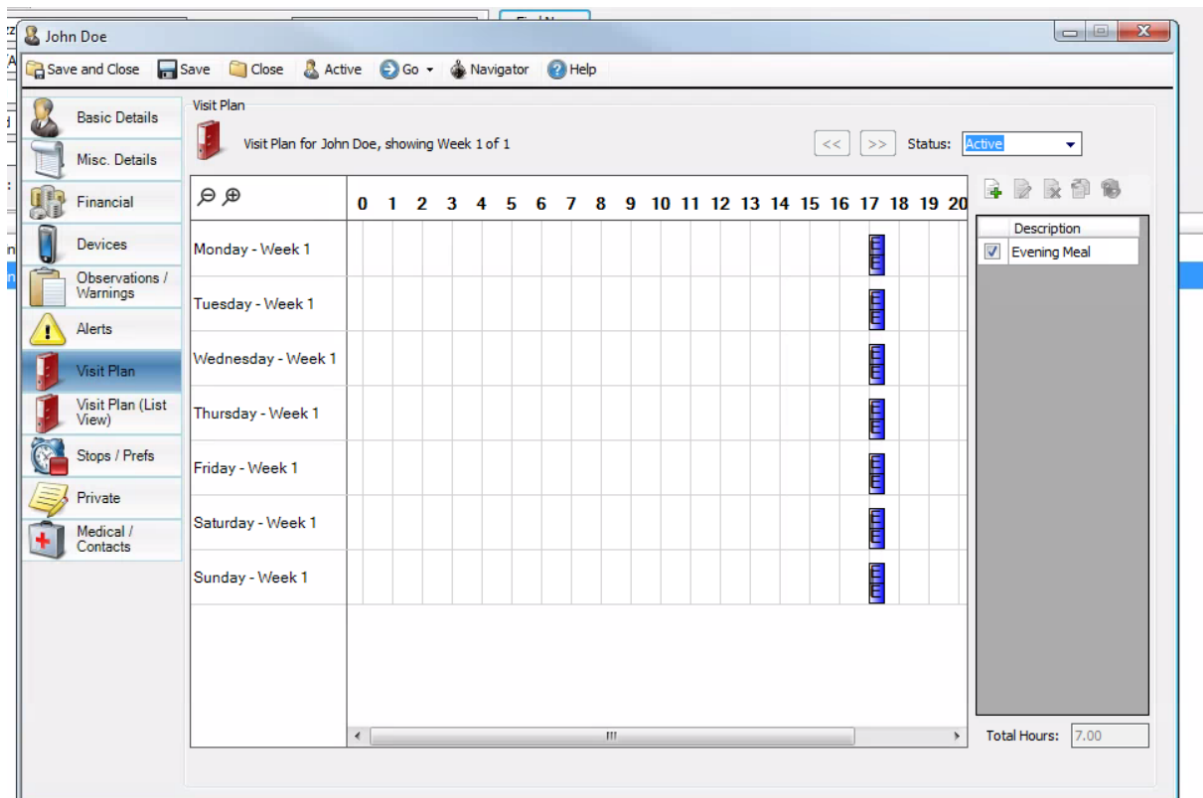
1. To view the allocated visit plan of a client, on the left-hand side, select “Visit Plan”.



2. Any coloured boxes will signify a planned visit. The row at the top till be the time and the column on the left is the day. In the bottom right of the screen, you can see the total weekly hours (“Total Hours:”). This is set out as decimal points – 30 minutes = 0.5.



3. From the "Visit Plan" tab, the coloured boxes will state if there is one or more carers assigned to the visit.
 - a. Singular coloured box = 1 carer.
 - b. Multiple coloured boxes = more carers.



Visit Plan (List View)

1. To view all the visits in an easier view, select the “Visit Plan (List View)” tab from the left-hand side.

The screenshot shows the 'Visit Plan' interface for a client named Tom Test. The interface includes a sidebar with navigation options and a main table of scheduled visits. The 'Visit Plan (List View)' tab is selected in the sidebar. The table displays the following data:

Wk1	Wk2	Day	Time	Rota Name	Rota Shift Name	Description	RTA	S/Safe
✓	✓	Mon	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Mon	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Tue	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Tue	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Wed	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Wed	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Thu	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Thu	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Fri	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Fri	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Sat	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Sat	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		
✓	✓	Sun	08:00-08:30	East 14	07.00 - 15.00	Breakfast		
✓	✓	Sun	14:00-14:30	(Unassigned)	(Unassigned)	Lunch (2)		

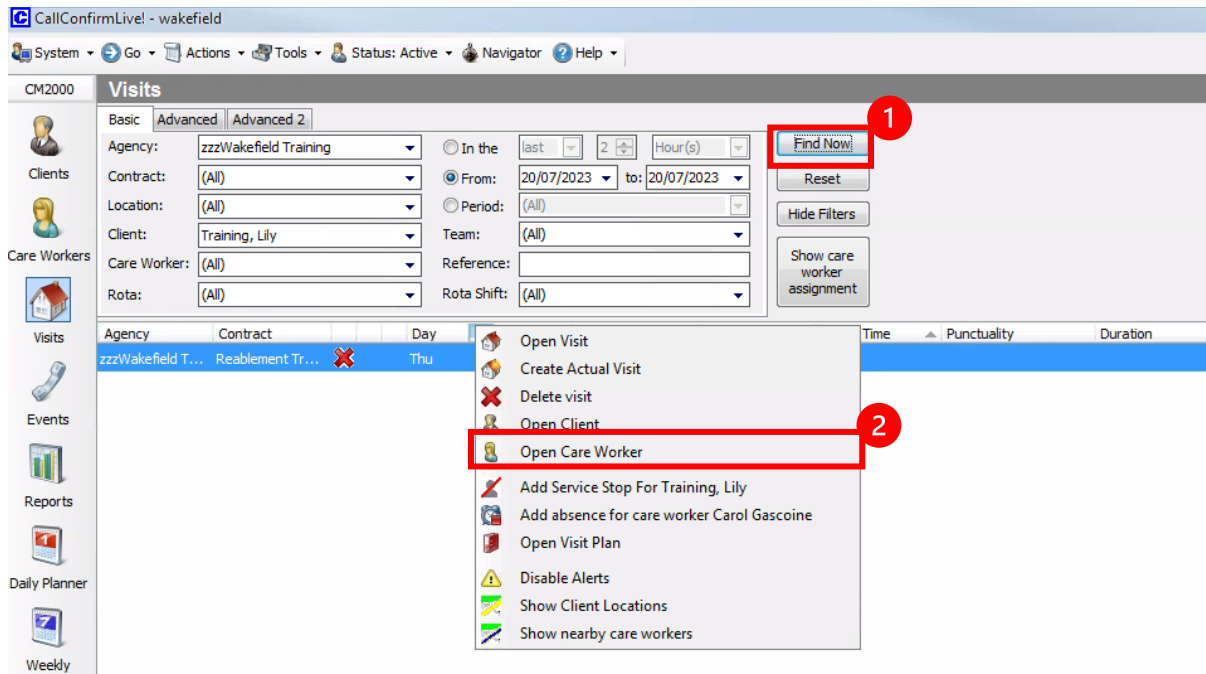
2. The “rota” column is the assigned runs the system will automatically allocate to specific carers.

Visits

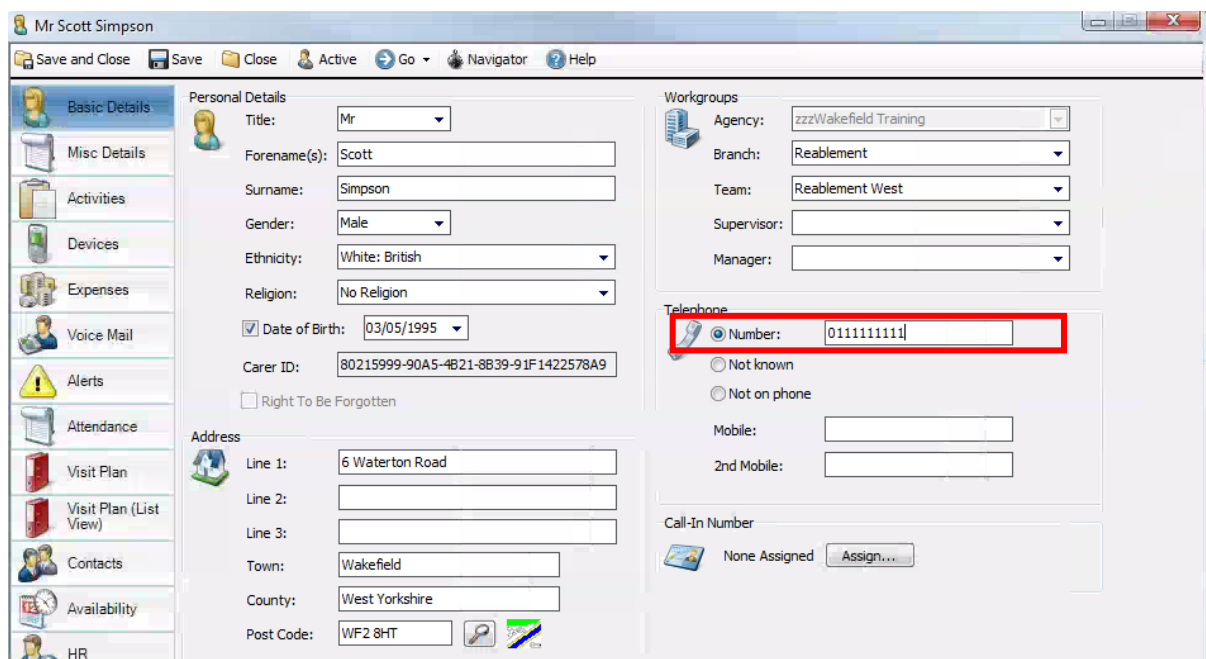
1. Situations may occur where the client no longer wants a visit to happen. Therefore, you need to find the client's visit and contact the allocated carer. Select the "Visit" tab on the left-hand side of the main screen.

2. Filter the information if you know the clients name use the "client" parameter. If not, use the others such as "Location" to show all clients link to reablement east/ west and so on. When using the dropdown of "Client" if it just states "All" then please select "Agency" first to the live environment. On the right-hand side use the "From" parameter to show all today's visits for that client(s). Then press "Find Now".

- After “Find Now”, this will display a list based on your filters selected. Find the visit that requires cancelling and right-click it, as we need to locate the carers contact information to let them know and select “Open Care Worker”.



- This will open the care workers record so we can find their contact information under “Basic Details”. Phone the carer to let them know.



Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	20/07/2023
V1.1	Changes: <ul style="list-style-type: none"> - Included Client record information, basic details, misc. details, key safe number, notes, and observations/ warnings. - Added visit plan (list view) - Visits – finding the cancelled visit and finding the carers information to contact them. 	SS	20/07/2023