Admin

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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

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.
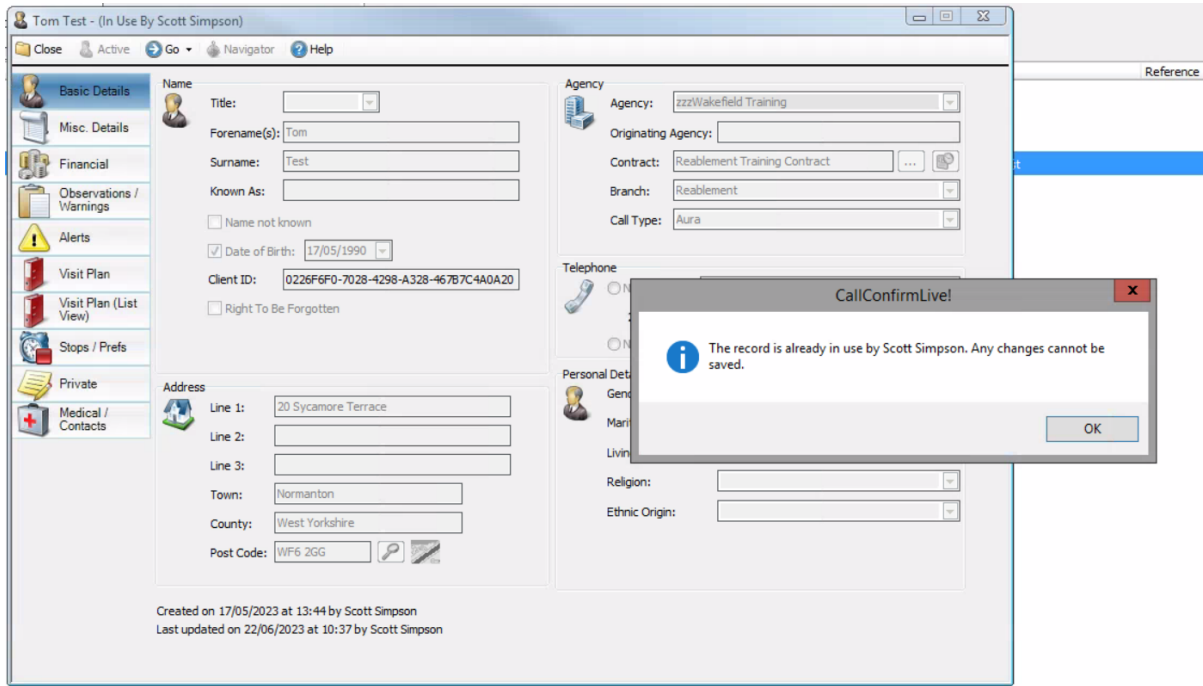

2. To rectify the situation. Select "Ok" on the error and press the "X" on the top right of the greyed-out window.
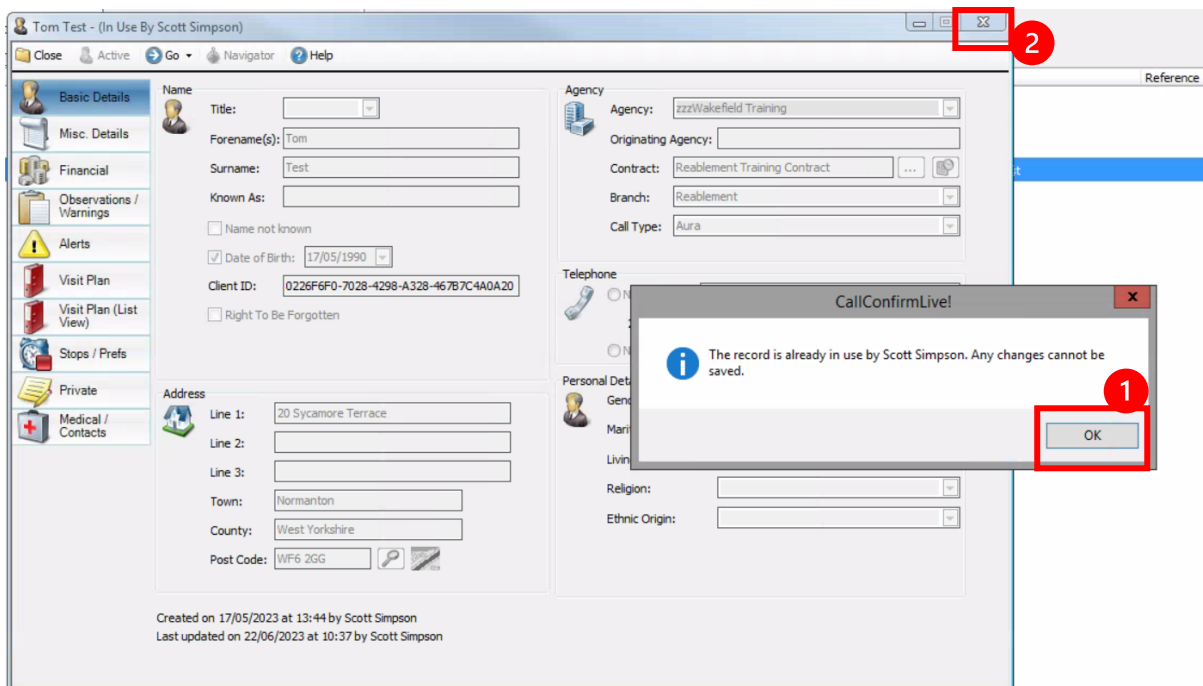
3. After closing the window, go to the top right, and select the box button.

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."
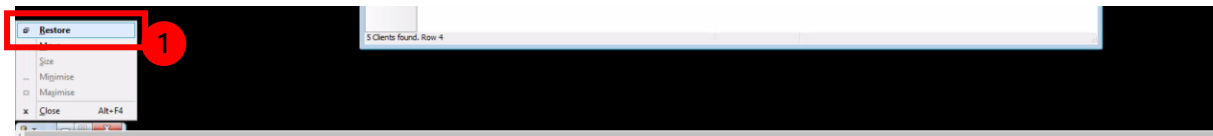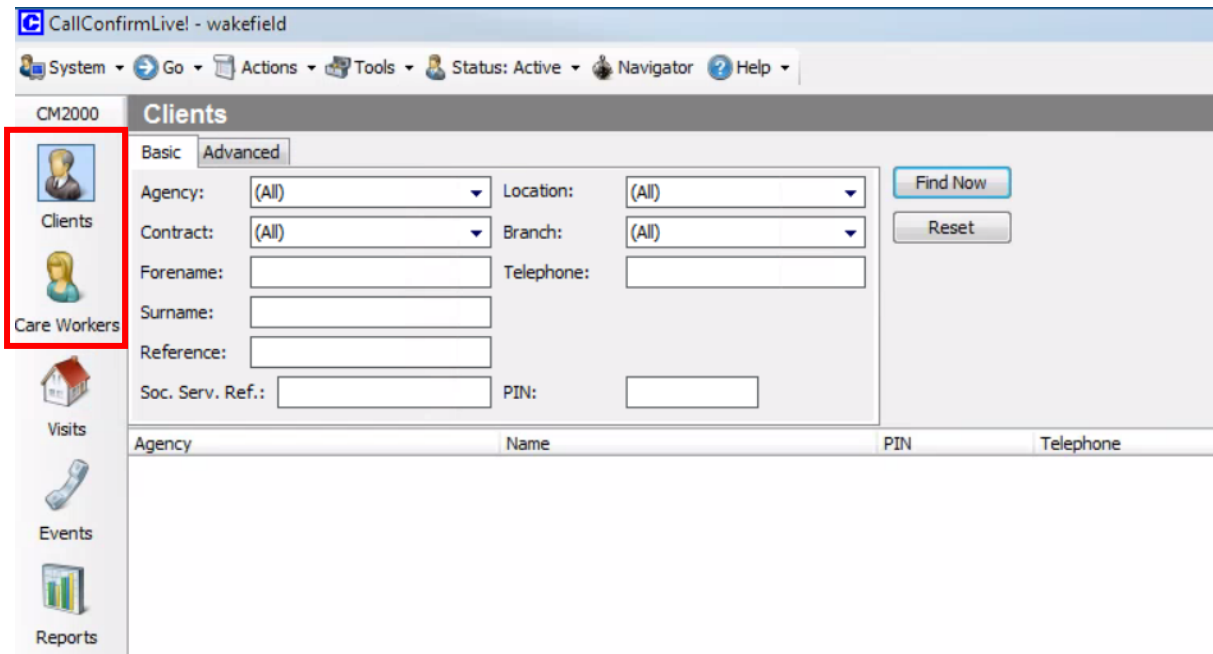

5. The window, which disappeared, will now be bigger. Complete what you need to and when you "Save and Close" go the original window you made smaller and select the box icon again to make larger.
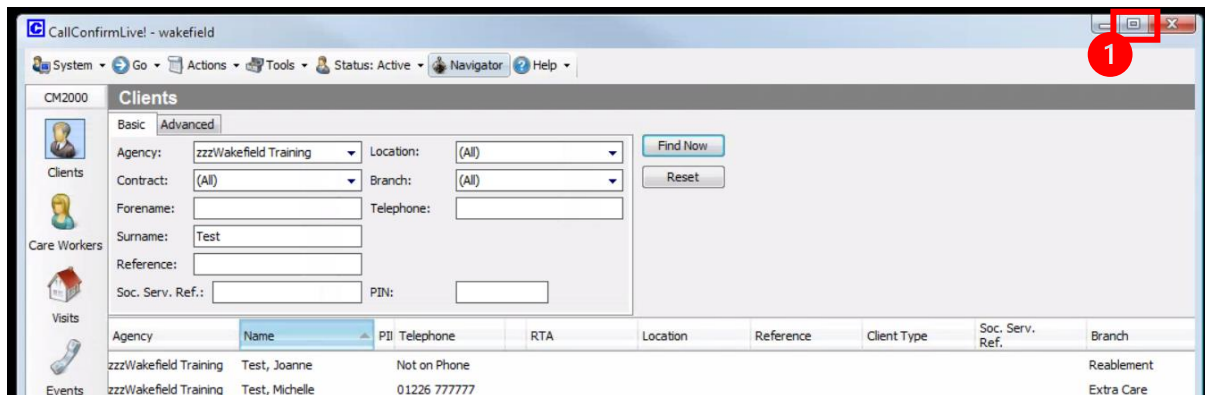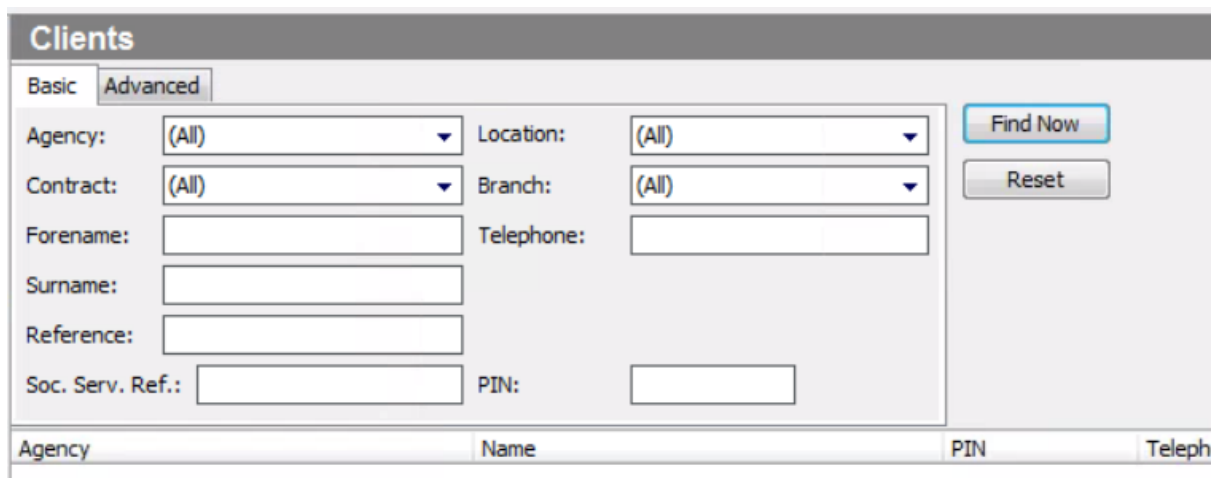
Search

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.

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.

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.

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.
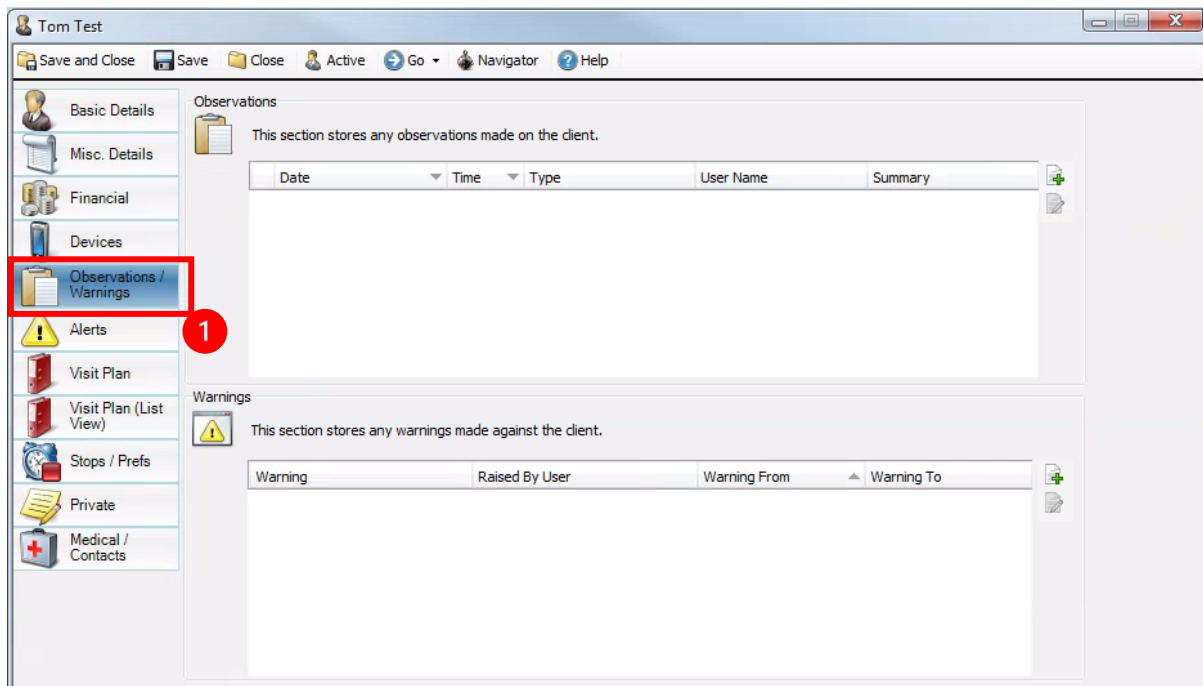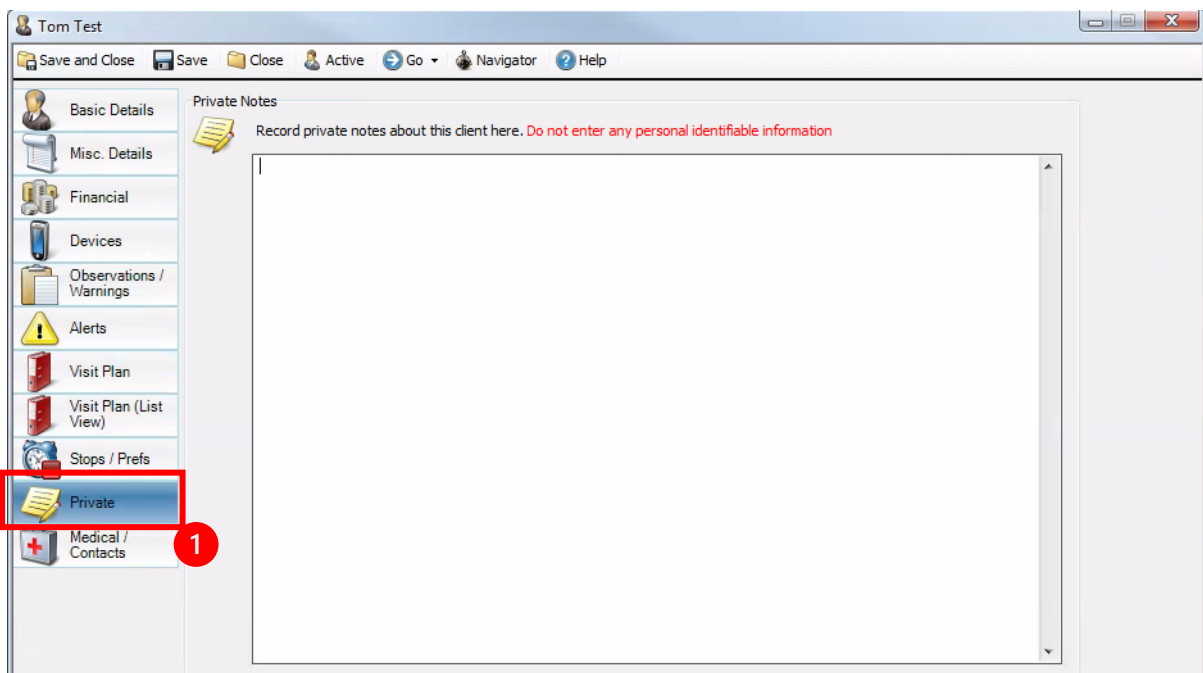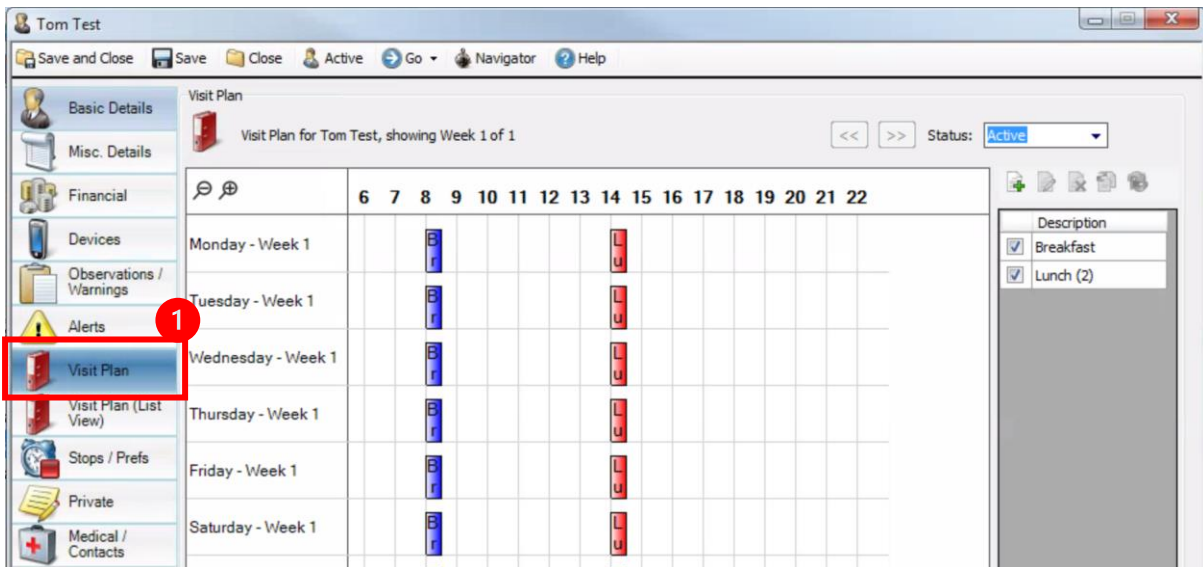

Private

1. This acts as the contact journal, information here may be applicable to share with the carer when conducting a home visit.
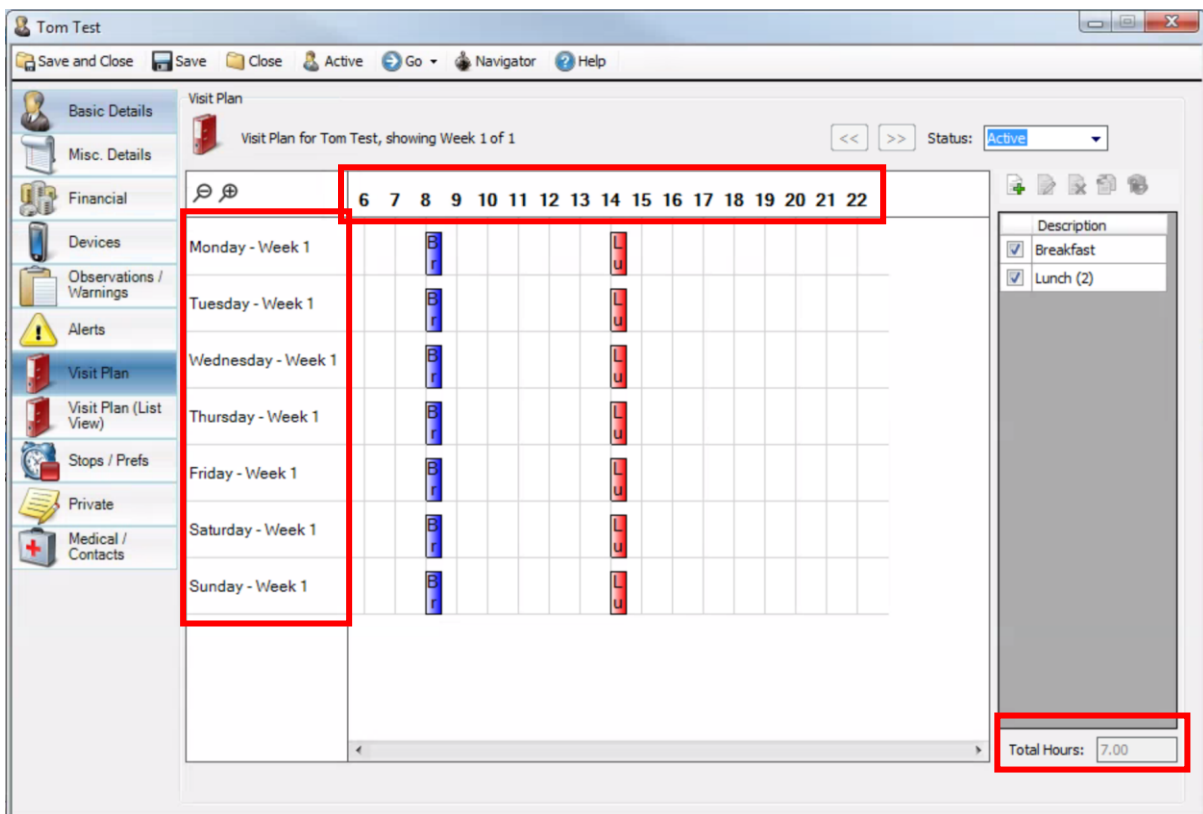
Visit Plan (Total Hours)

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.
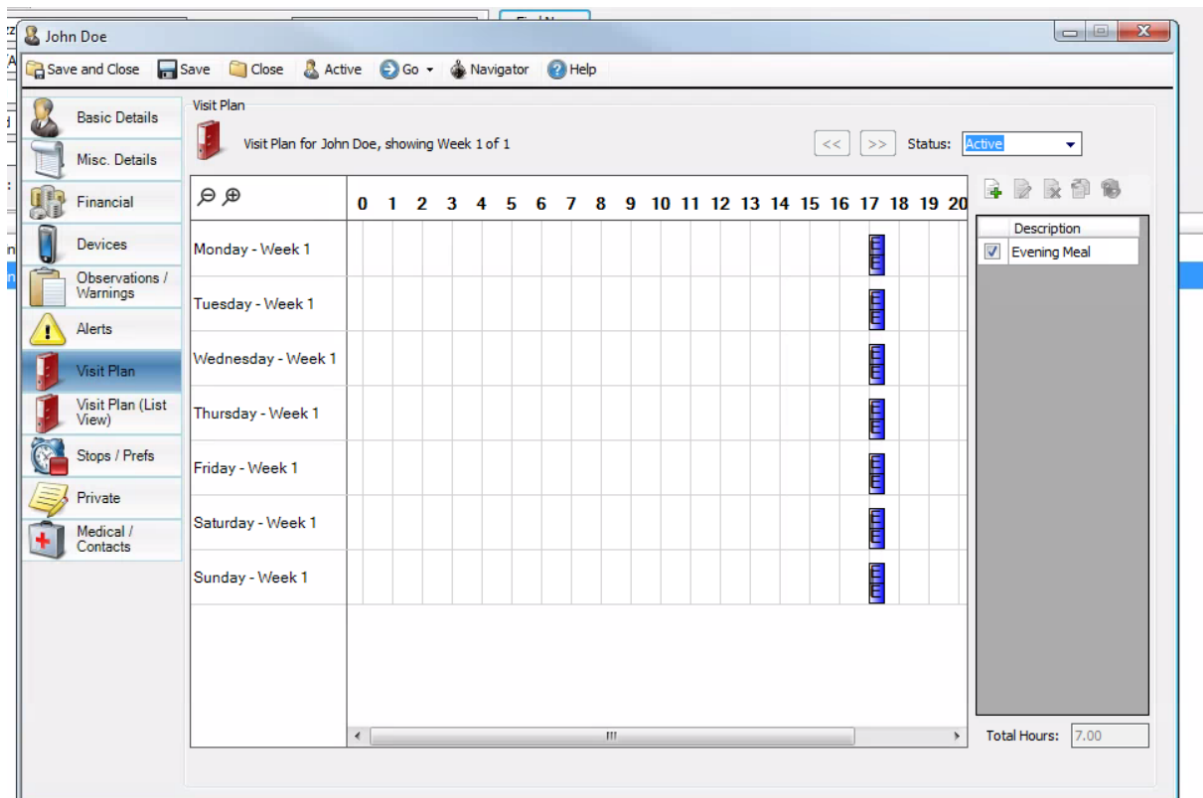
Visit Plan (List View)

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


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".

3. 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".
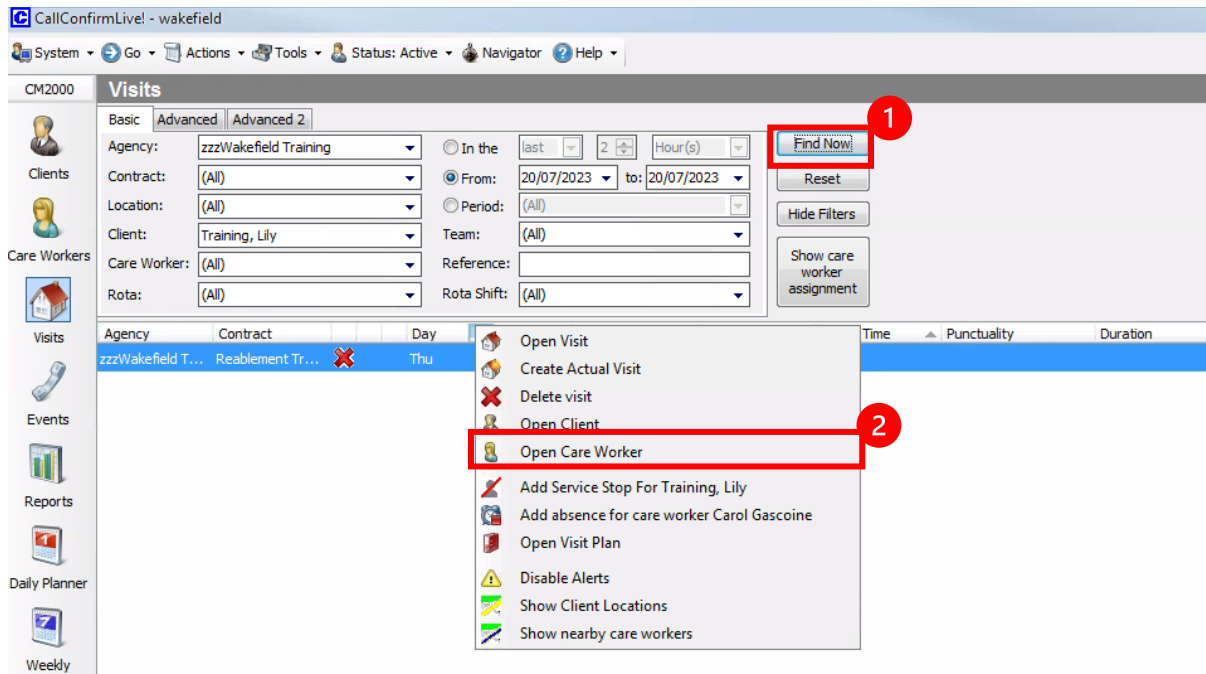
4. This will open the care workers record so we can find their contact information under "Basic Details". Phone the carer to let them know.
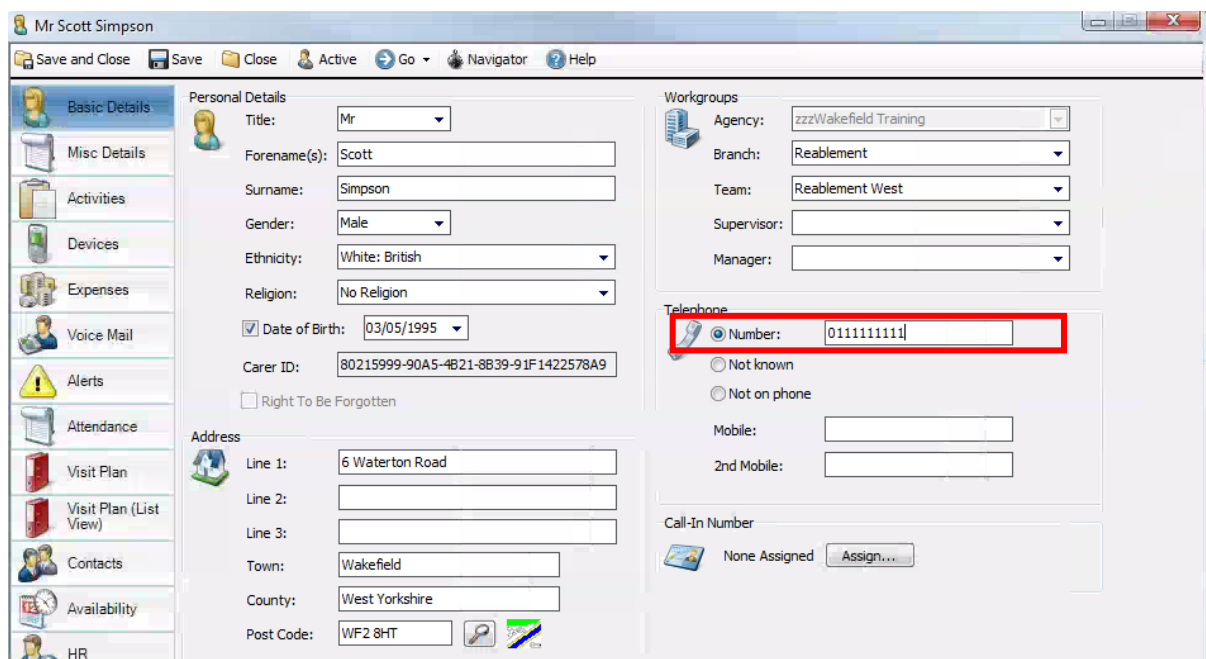
Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	20/07/2023
V1.1	Changes: - 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