Support Assistant Guide V1.8

Document   CM - Support Assistant

Purpose   A guide for the process behind carers for CM.

Version   V1.8

Owner   ICT Business Transformation Team / System Support Team

Last Updated   17/01/2024.

Contents

Purpose of the guide

1. There are four separate roles on CM – Scheduler (Planner), Practitioner, Admin and Carer. This guide is for those who act as a Support Assistant. I will be covering the process behind CM and what both reablement and extra care 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

5. Please use the CM – Tablet Setup guide if you have just received your tablet.

Access

1. As a support assistant it is important to realise you have access to CM Mobile only. This guide focuses on some changes you will only need to complete once as well as some day-to-day support if you need further clarity on areas. With the access section, please follow the steps below and open the email inside of Chrome so you can save your password. If you struggle at any point please let your practitioners/ co-ordinators 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.

2. Open your tablet and open **Settings**.
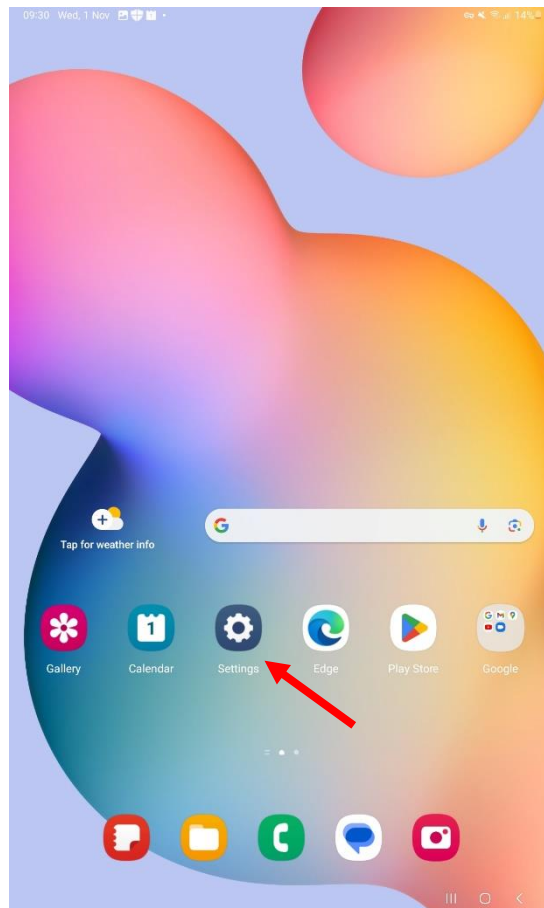
3. On the left, navigate to **App**.
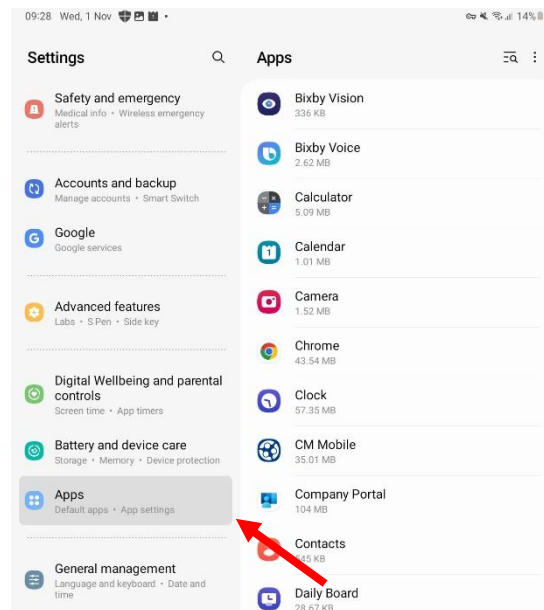
4. Then on the right go to **Chrome** and open it.
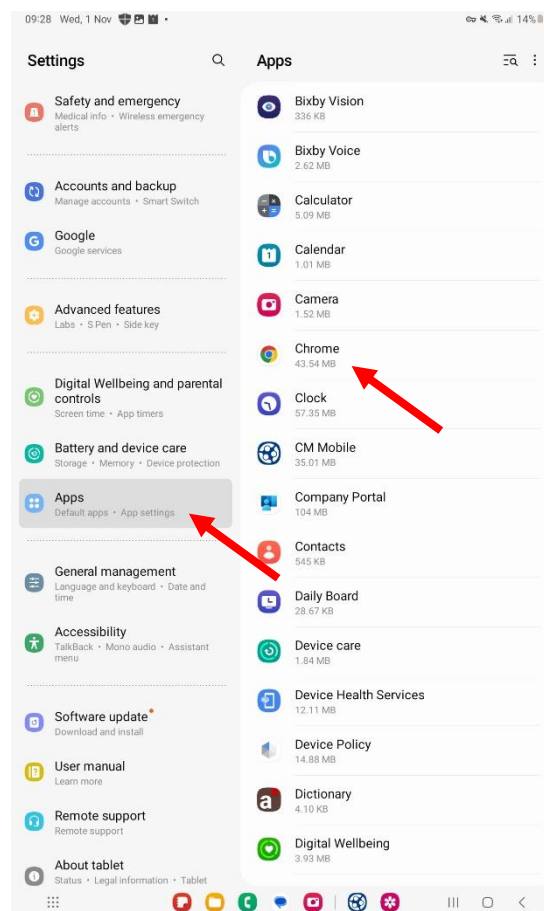
5. Once selected, it will change screen. Under **Browser App** it should say **Chrome**.
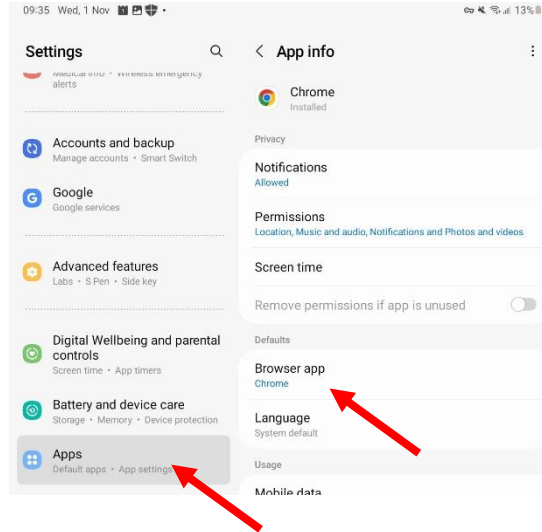
6. If it does not, then select **Browser App** and tick box the **Chrome** option.
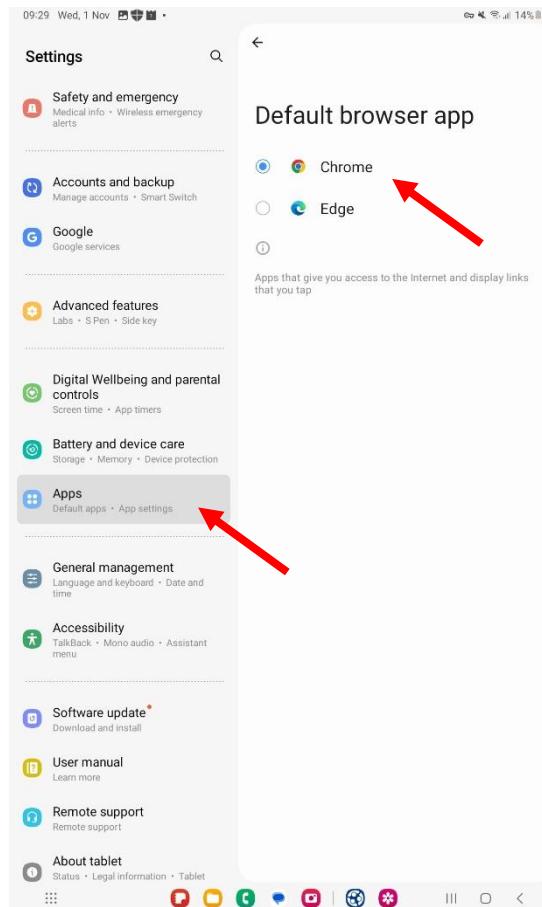
7. Now you can open the email in **Chrome** and when it asks for you to save password, please select it.

CM Mobile

1. Unlock your tablet and find the app **Play Store**.
   Please Note: These screenshots show the tablet in the vertical position, if you have it horizontal then it will jump to the next screen.
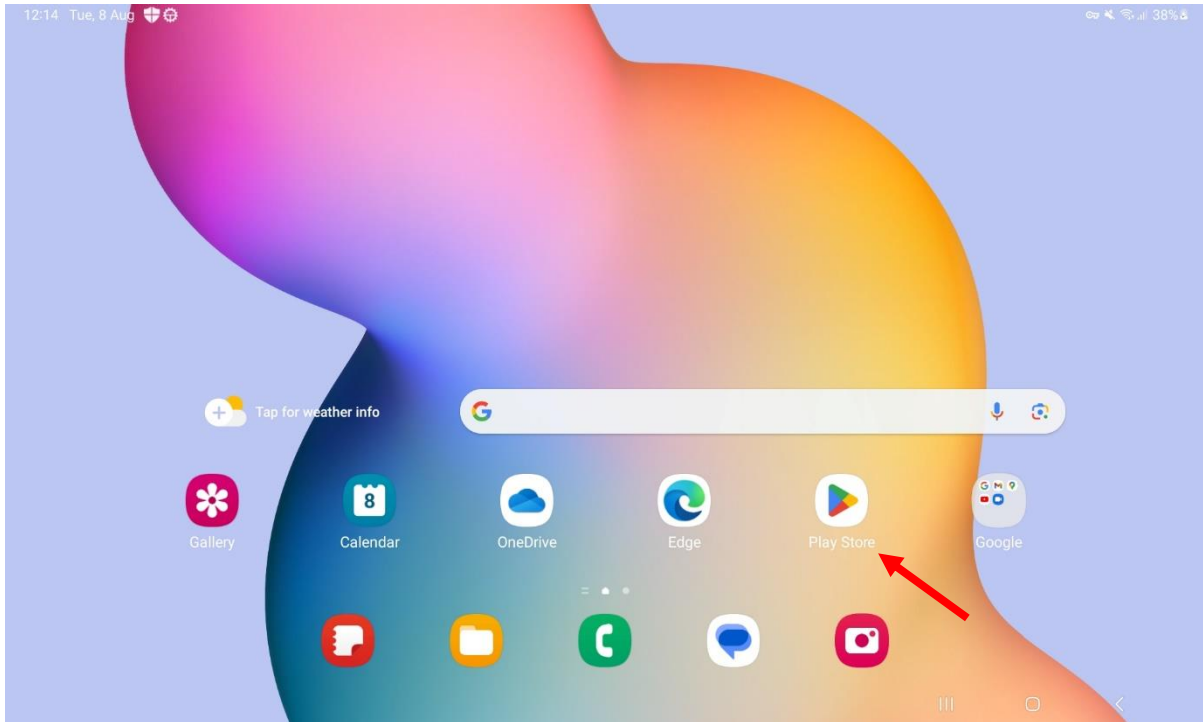
2. Once selected, press the search icon at the top of your screen. Search for **CM Mobile** and select it.
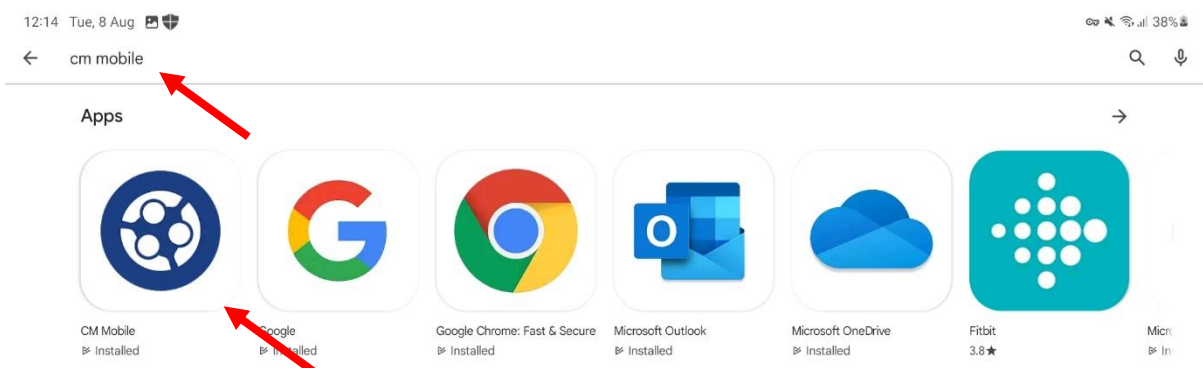
3. It will either say **Install** or **Open**. If:
    a. **Install** – you need to install the app to be able to have it ready.
    b. **Open** – you already have it installed and you do not need to reinstall it.
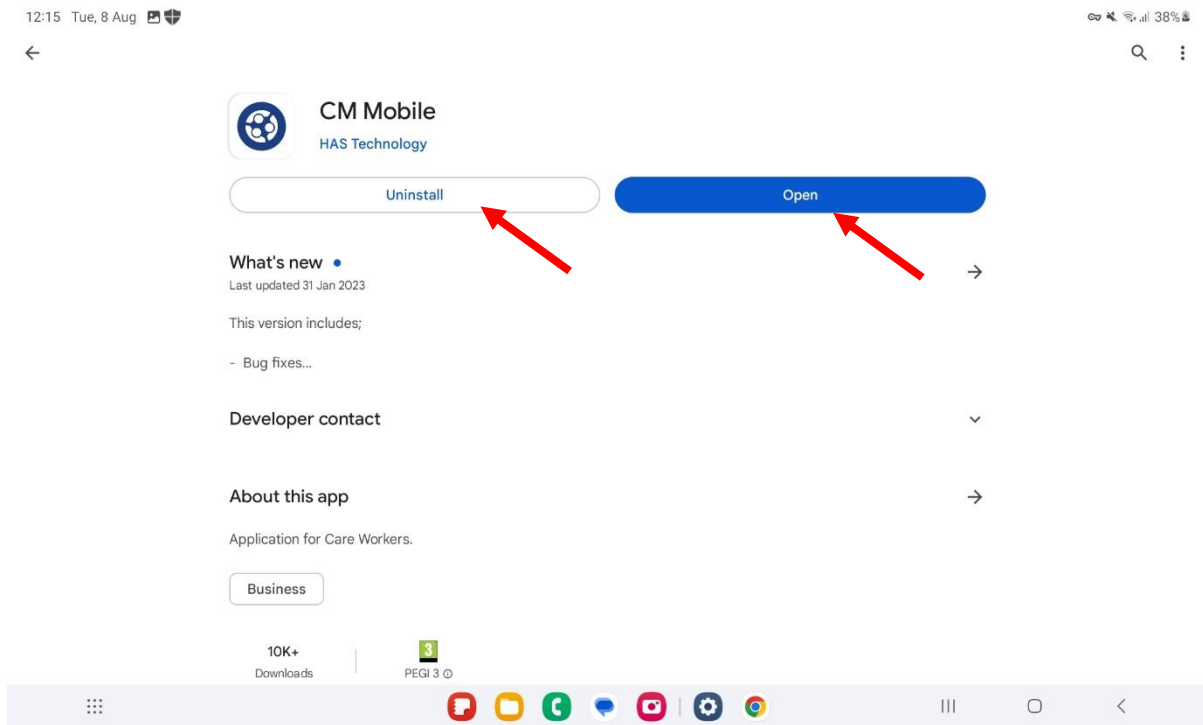
4. Do not worry about log in details yet for CM Mobile as these are going to be provided during your training.

Login/ Password Setup

1. Within your emails, you will receive an email from noreply@hastl.com select **Click here to activate your account** within that email (this can be done in your tablet).

   Please note: If you are not sure if this is the correct email, please ask your superuser or a colleague to check first.
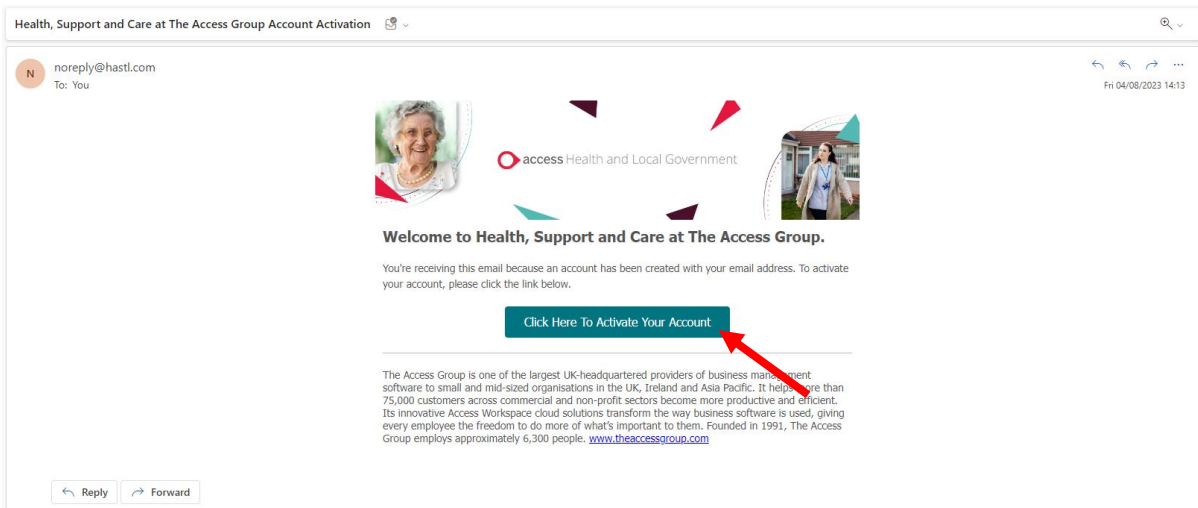
2. After you have selected the **Click here to activate your account** it will redirect you to a website that will ask you to create a new password and confirm it. When you have done so, select **Activate Account**.

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

3. After you have successfully created an account, you will receive another email welcoming you to Access.
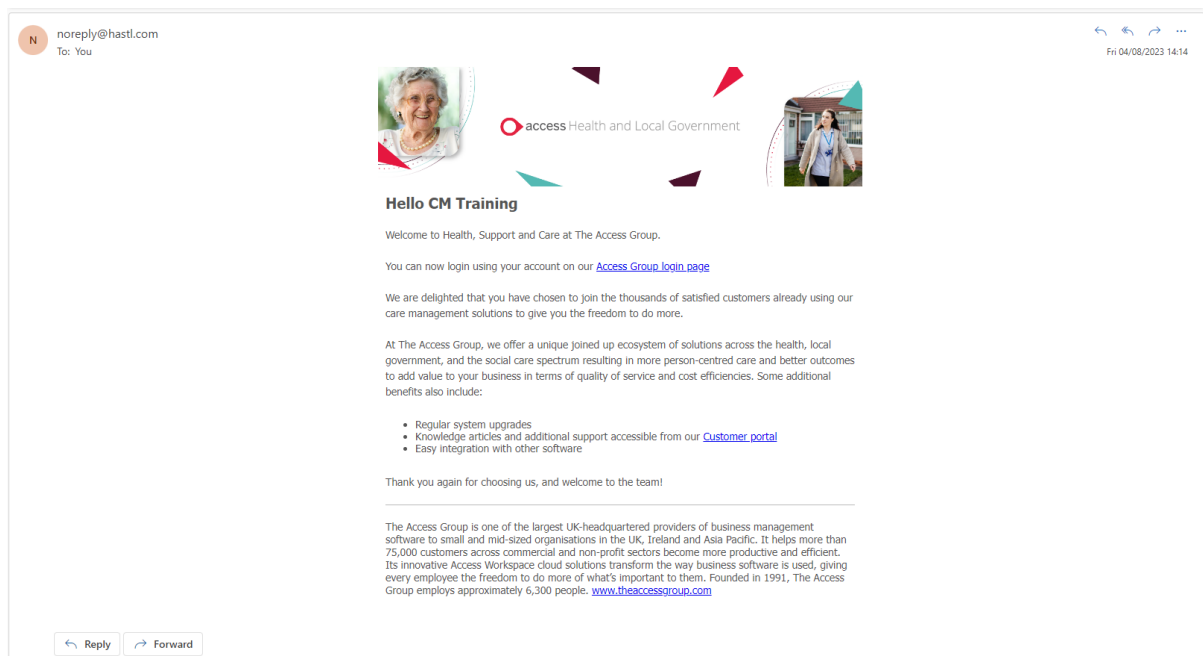
4. Please use your email address and the password you just created for logging into the CM Mobile application.
    Please note: That when creating your password your browser will ask you if you want to **remember your password** and you do. Select **Got It** or **Save** as this will ensure when logging into CM Mobile it will automatically fill in this information. If you have not done this, please refer to the frequently asked question section of this booklet to find out how to.

Tablet Login

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

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

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

4. It will then direct you to a log in page, if before this you encounter a warning message about google chrome please select **Continue anyway**.
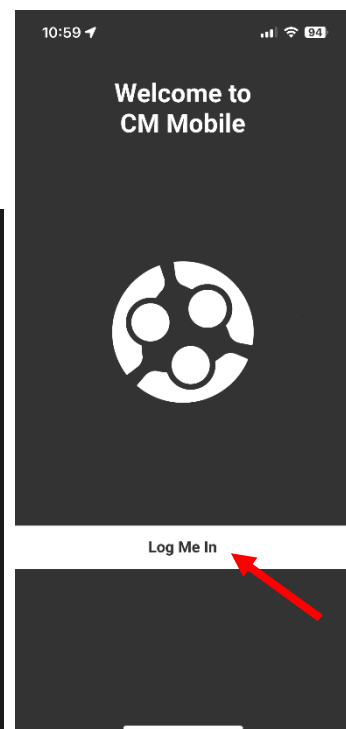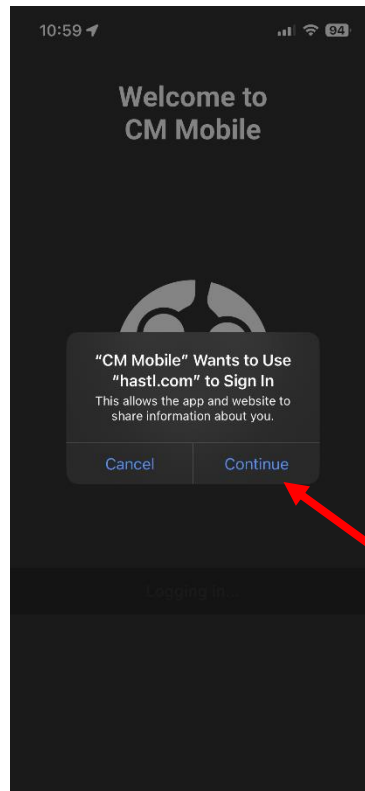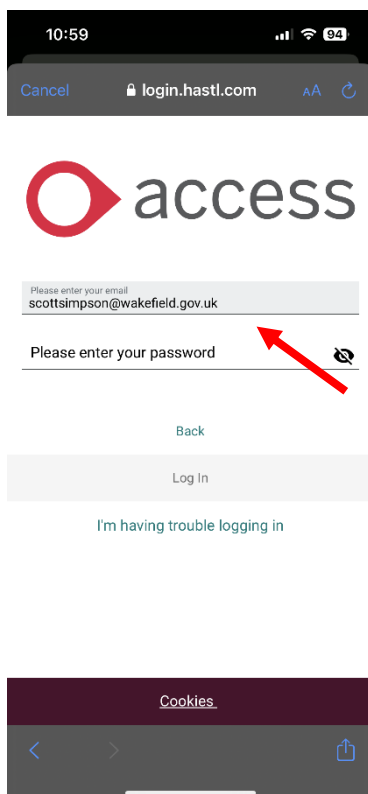
5. To set up your password, you will have received an email asking you to confirm and set up a password for your account. Type that emails and password into the next two screens and select "Log in".

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

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

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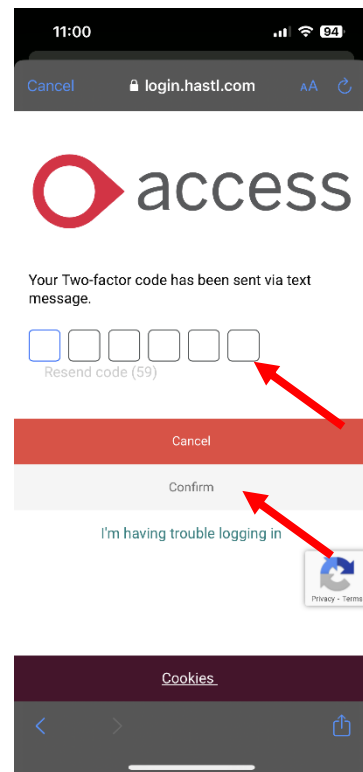
Offline Functionality

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

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

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

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

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

Key Principles

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

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

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

4. When going to your (first) next visit it is important to check for any existing notes and key safe number. Please be aware the person still has their client record booklet, the notes found under **Client Notes** and **Planned Visit Notes** on the second screen is information the practitioner/ 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 are still required to do forms, eMar, Med7, body/ fluid charts on paper. The list of tasks required to be completed will be inside the CM Mobile app in the second screen. Undertake these tasks and update the journal section– this is separated into three entry types. The visit log, client feedback, outcome progression notes. Update each accordingly. Please refer to the Journal Section if you need further clarity.

8. When the visit has been completed, go back to the first screen and **Scan QR** again. This time wait until **Completed** green has appeared. Once it has by scrolling down to refresh the screen, go back into the second screen of the completed visit and open tasks. Now you will be able to mark off the ones that have been completed (regardless of whom did it, just ensure you are making a journal entry into who did it), do not mark the ones that have been refused or has not been done (just ensure you are making a journey entry on why they have not).

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

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

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

First screen

Planned Visit Screen

1. The first screen is what you see when you first log in. This is your planned visit programme screen. It contains information such as how many tasks, name, address, duration, planned time (actual time will appear after you scan QR), if it is a double up, scan QR and calendar to check tomorrows planned visits.
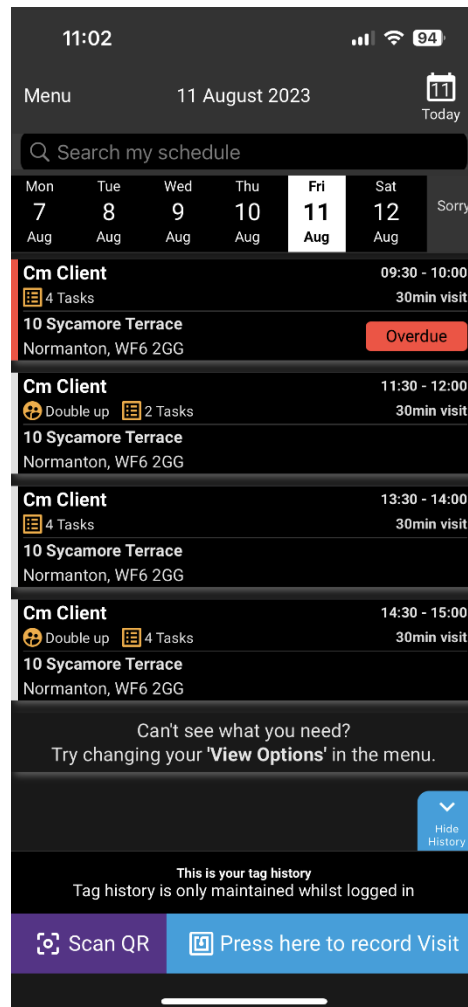
2. This is a touchscreen; you can use your finger to select which visit you want to open into the second screen.

Coloured Boxes

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

   a. The red **Overdue** box will indicate you are late, if this visit requires nudging back or you cannot make it, please ring the office to give a reason and ask for this to happen.
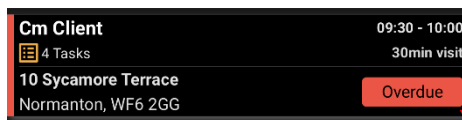
   b. The yellow **Incomplete** box means you have arrived and there should also be an "actual" time indicating when you arrived.
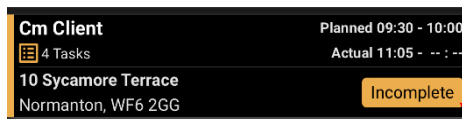
   c. The green **Completed** box means you have completed your visit. This is when you can go back into the second screen and tick off any completed tasks.
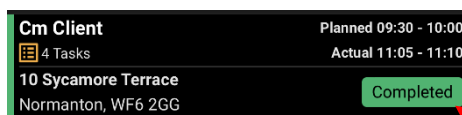
Scan QR

1. The **Scan QR** button will allow you to log in to visits. When scanned, the app will automatically match the assigned tag to the appropriate visit. Upon arrival at the visit, find the QR, press **Scan QR** and point the camera (which is located at the back right of the tablet) at the QR code and it will scan for you.
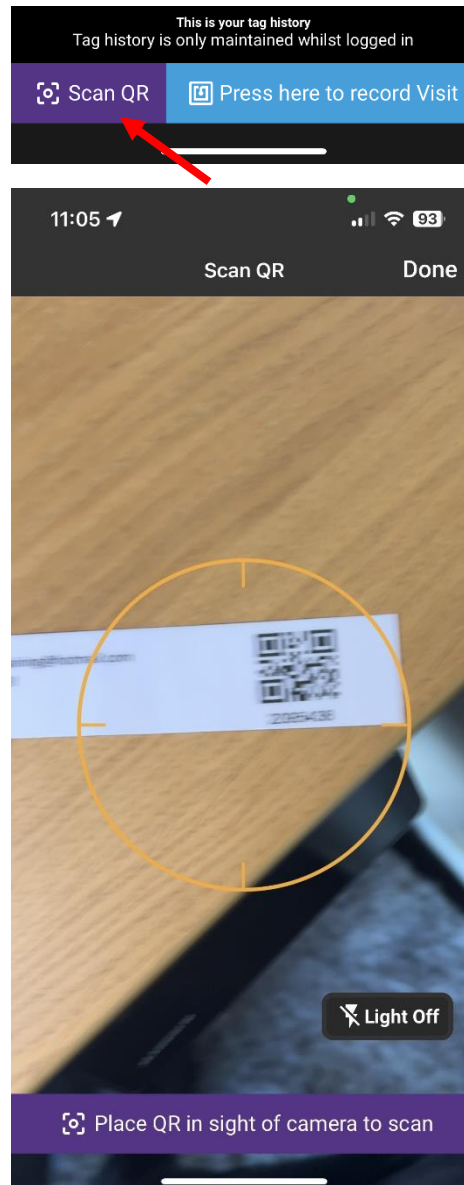
2. Please scan it only once, you will know it has worked when you get a big tick on your screen, including a green matching visit where the **Scan QR** button is located. You will also see a CC with a timestamp.
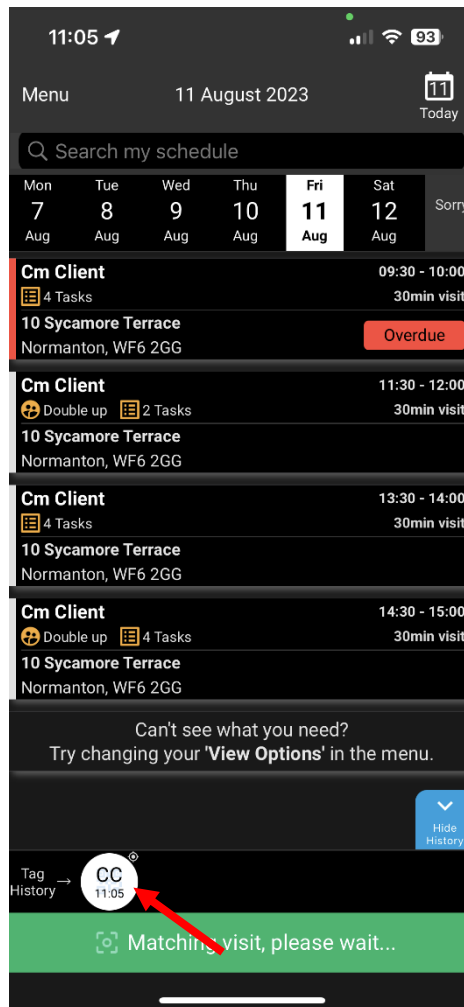
3. Once scanned, the matched visit will turn yellow, and an actual time will appear.
Please note: if there is an issue if the scan or it has matched to the wrong time, please ring the office. This is not how you do an unplanned visit such as buzz call or dignity calls.
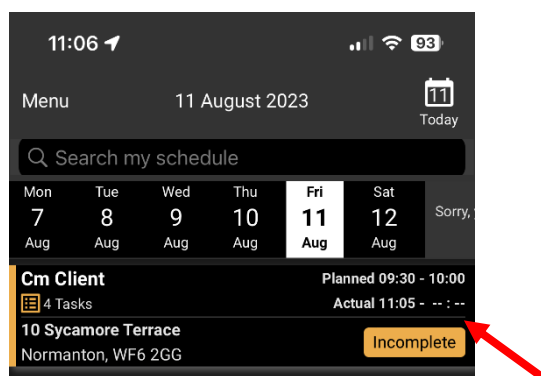
Menu

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

Start/ Pause/ End Shift

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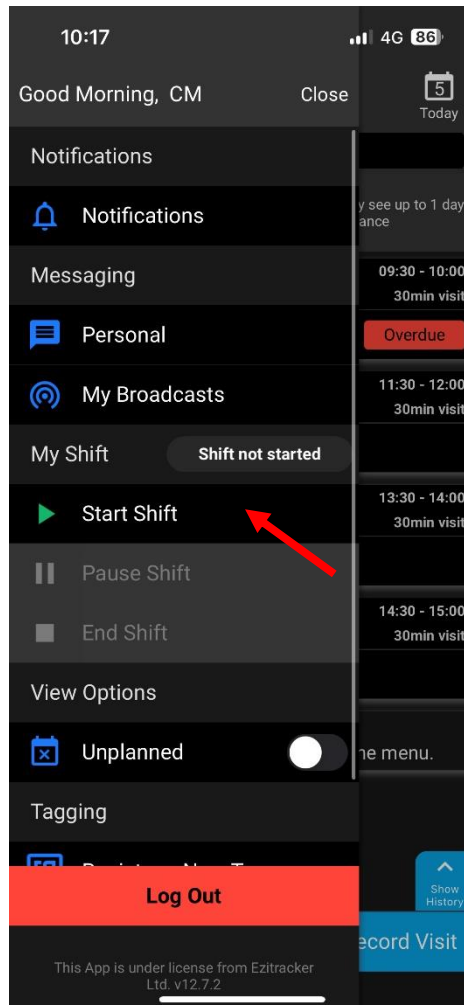
Messaging

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

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

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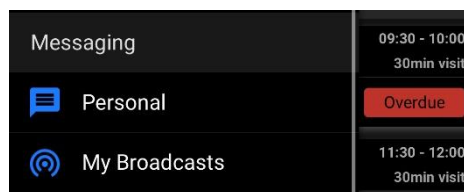
Unplanned Visits

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

Panic Button

1. This for when emergencies happen. When you raise an alert in the app, an automated call will be initiated to the office.
   Menu > How for 3 seconds to raise alert > Hold for three seconds.
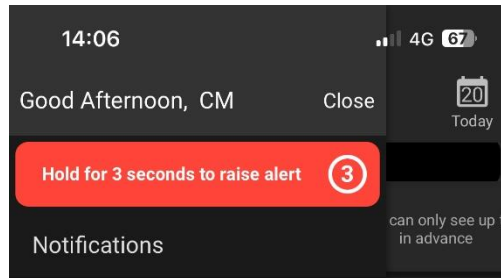
2. After holding for three seconds this will initiate a call to the office. The caller will hear an automated message that reads a Panic Alert has been raised and they will be able to identify you by your PIN number associated to your carer worker record in CallConfirmLive!

3. When completed, the following notifications will show within the app.
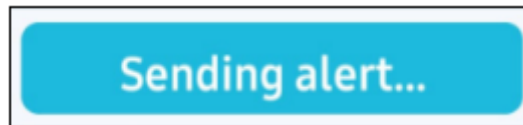
4. You can resend the alert by holding on the green banner.
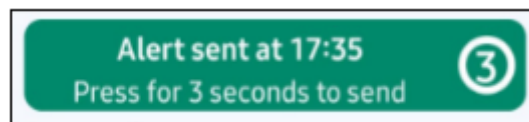
5. Please note: To use Panic Alerts to send a message to your office the app will need to be online (with a data connection). If this is not in a place with the following, a banner will appear at the top of the menu. Please call 999 on your work mobile instead.
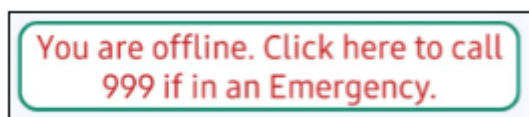
Second Screen

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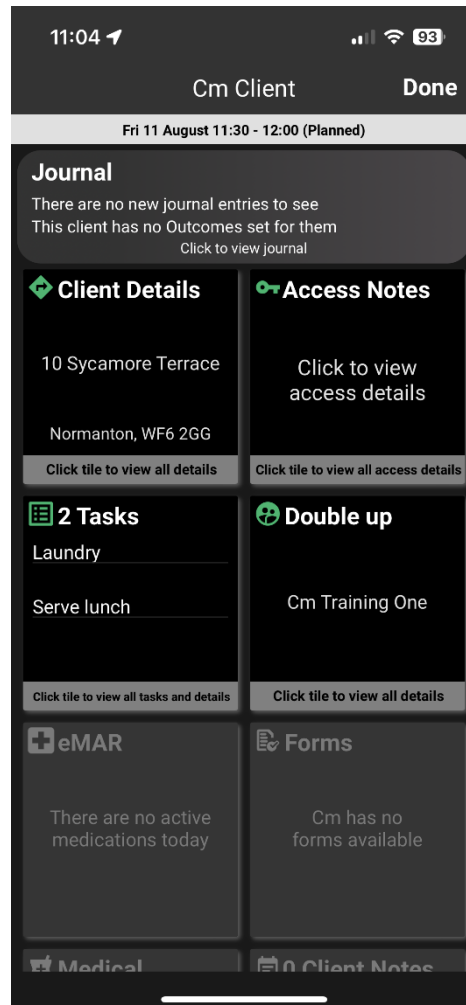
Client Details

1. This contains the clients phone number once selected.

Key Safe Number

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

Complete Tasks

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

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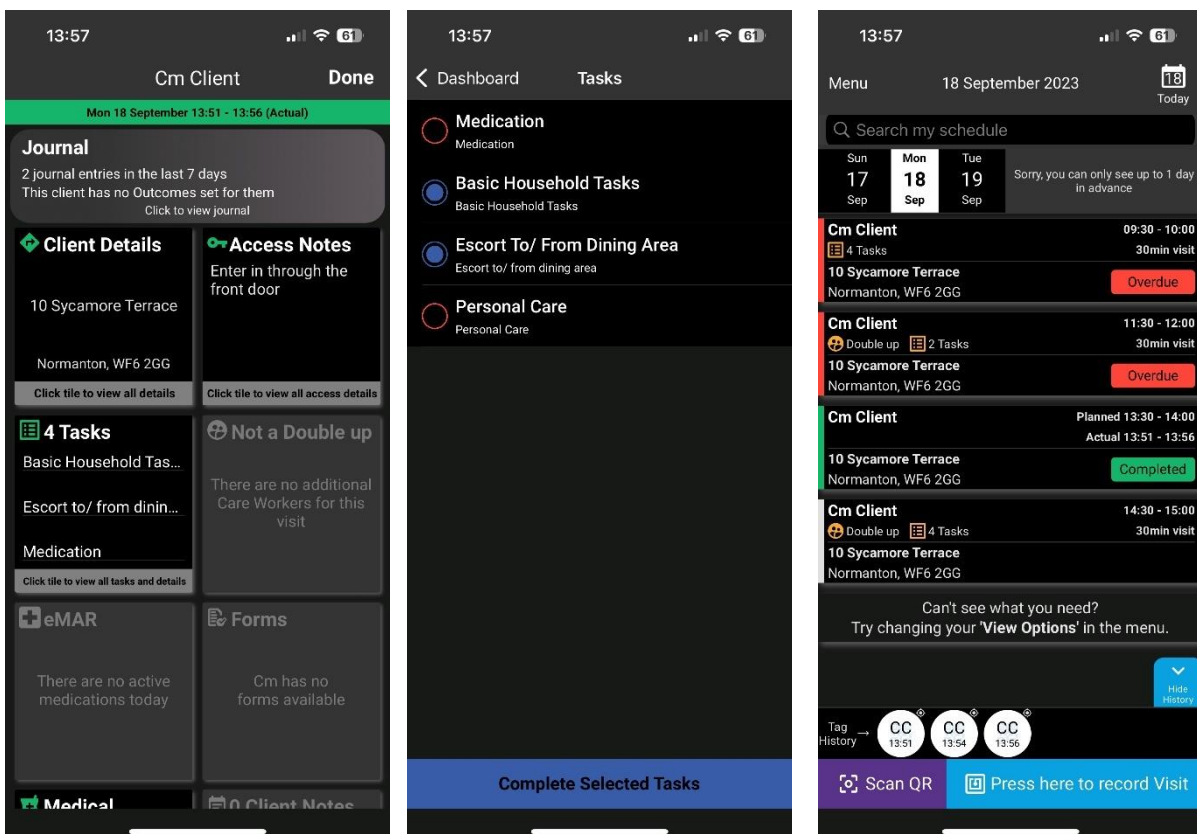
Client Contacts

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

Client Notes/ Planned Visit Note

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

Journal Section

Purpose of this section

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

2. This section corresponds to Support Assistants.

3. This section focuses how to enter the information on both the Mobile version.

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

1. Select "**Journal**".
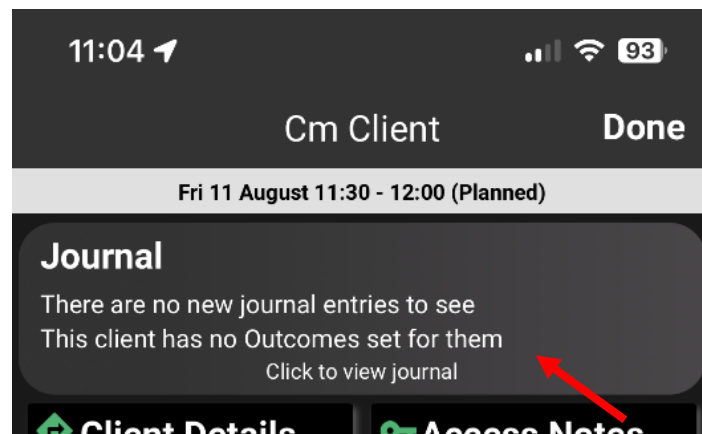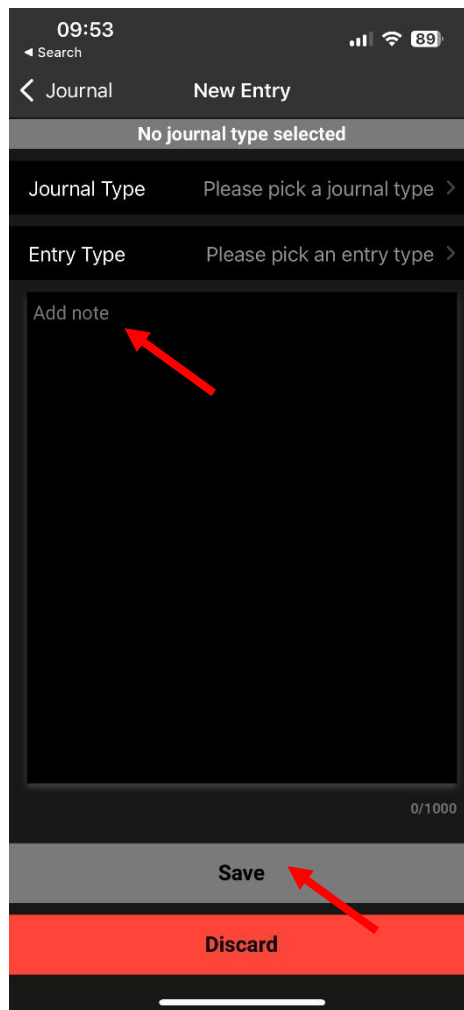
2. When selected, you will see previous entries by other carers. Feel free to read through those.
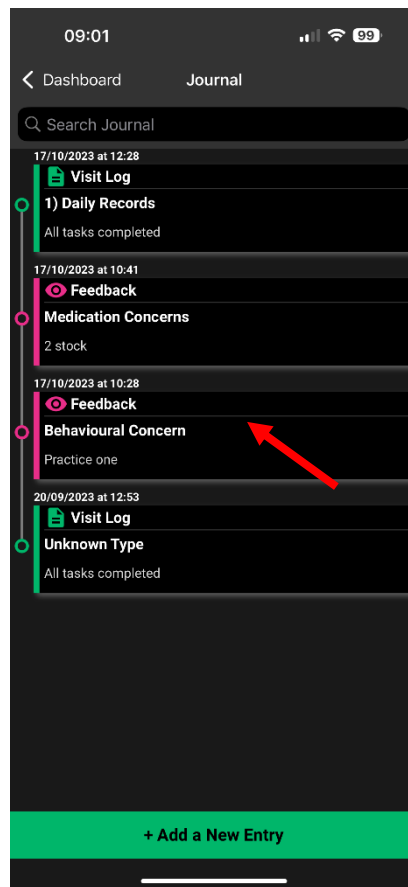
3. To add a new entry, select "**Add a New Entry**" at the bottom of the screen.
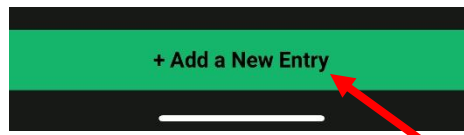
4. When selected it will open another screen asking what it is you want to enter. The top being the type of entry (Visit Log/ Client Feedback/ Outcome Progression Notes) you wish to enter via **Journal Type**. The **Entry Type**" are the pre-designated choices that can be selected depending on which Journal Type has been entered.

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

Visit Log

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

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

2. Completion of visit logs can be viewable by the practitioner/ co-ordinator however, they will not be notified of it.

Client Feedback

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

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

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

3. Concerns are categorised into themes.

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

Outcome Progression Note

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

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

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

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

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

6. 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.

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

Adding an outcome progression note

1. As a support assistant your role is to read through these outcomes that the practitioner/ care coordinator has designated to the client via their PSP and provide updates to each.

2. To add an outcome progression, note, open the client's record on the CM Mobile app and select "**Journal".**
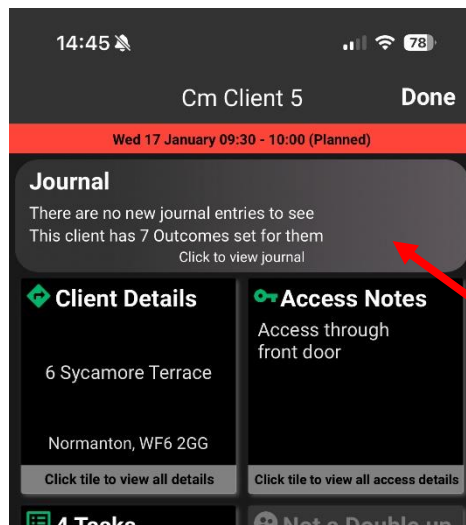
3. Then here you add a new entry via the **"Add new entry"** button located at the bottom of the page.
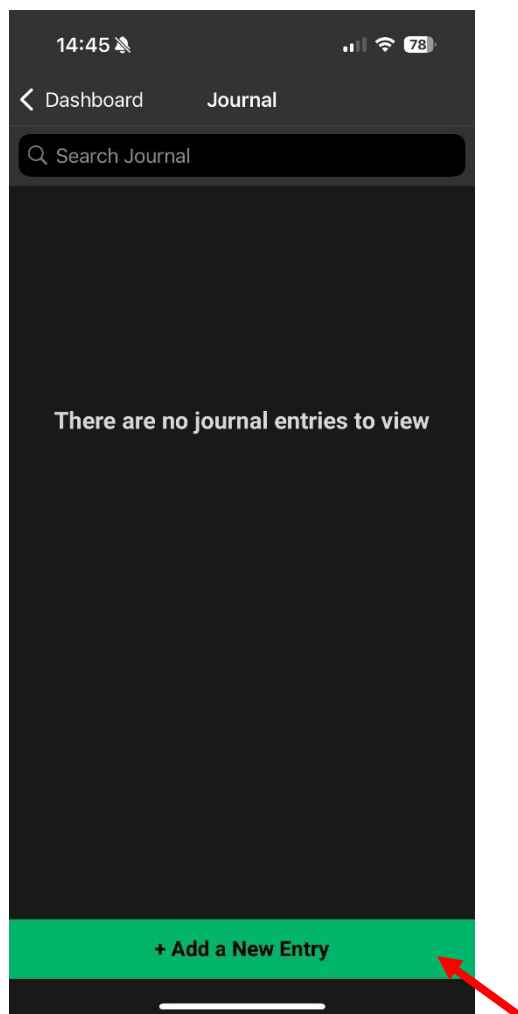
4. Then on the top box (Journal Type), select **"Outcome Progression Note"**.
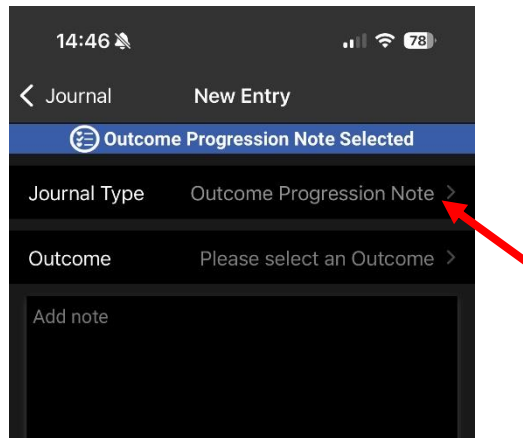
5. Underneath on outcome, when selected, will bring up all the goals and outcomes linked to this client. Whether that is to maintain or achieve more. Read through and select the one you need to update making sure we are updating each goal every visit.
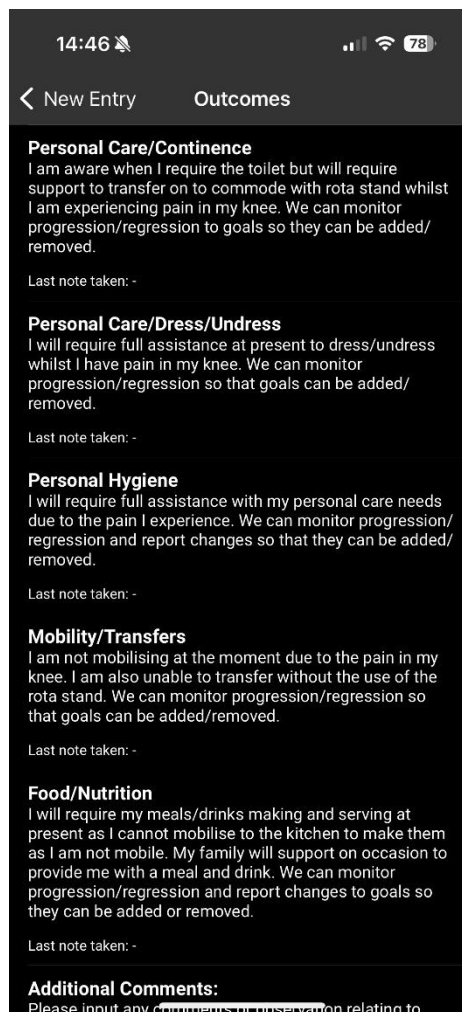
6. Once selected, it will bring up the page where you can add a note. Update the selected outcome with the specific update and save.
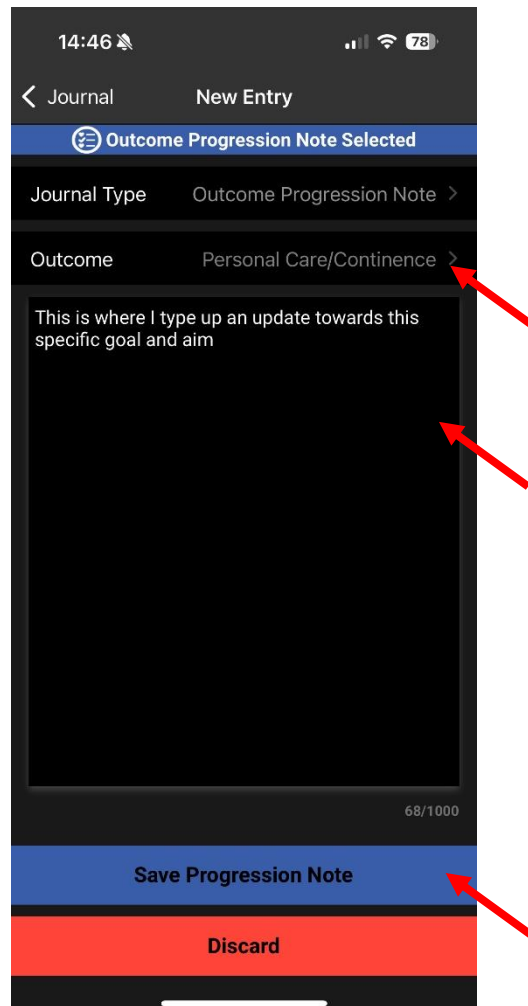
7. This will then be shown in the first screen where you can read all of the other update's carers have saved. Please repeat until all goals have been updated.

Frequently Asked Questions

Do I need to keep typing my email and password? Or is there a way to save it?

1. Of course, there is a way to save it. First you must open "Google Chrome" on your tablet and type this website into it. Login.hastl.com

2. Once opened, type your email and password. You will recognise this screen from CM mobile.

3. After you have typed your email and password a message will appear on screen either at the top or bottom asking you to save your password. You do want to save it.

4. Do not worry about putting your phone number in. Simply go on to CM Mobile and now when you press on your email it will pop up at the bottom of the screen with your username and password.

Extra Care – How do I Scan QR for coffee breaks and walking to dinner hall?

1. You do not for the time being. You only need to scan the QR code for when you are conducting visits inside of their flat. When it comes to anything else, use the manual login.

Do I need to keep logging out?

1. Nope, just lock your screen.

2. After a certain length of inactivity, you will be automatically signed out of the app therefore you need to sign back in then. Otherwise, keep it logged in. It will make the process faster for you.

How do I log my own lunch break?

1. You should have received a QR code or there will be one available in the staff room for you to create an Unplanned visit for.

2. Do not worry about the planned visit turning yellow and then green. You are simply pressing "Menu" > "Unplanned" > "Scan QR".

3. Any confusion asks your superuser.

It keeps taking me back to the log me in screen whenever I try and log in?

1. This is because you are entering the CM Mobile app whilst in horizontal mode. Please swipe down from the top of your screen and have "auto rotate" active and not locked. Ensure that you are angling your screen vertically before opening CM Mobile.

Can I use my own vertical case?

1. Yes, you can. Using the given horizontal case can sometimes be frustrating for some. If you would like to buy your own vertical case to assist you feel free.

Do I need to use the keyboard?

1. Not at all, feel free to place the keyboard in a safe place so you can return it in the future.

Can I use another device?

1. Yes, you can use your work phone if that device is suitable and can run the application. However, if you only have a tablet, please continue to use this. Please do not use your own personal device.

I am not getting a text message after logging in.

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

Extra Care Buzz Calls

1. Where staff receive a buzz call for someone who they provide care and must attend the persons property, staff should "Scan QR" as normal to log a visit. If it does match to an existing visit, please let office staff know so they can remove.
1. These visits are chargeable and need to be logged so they are included in the actuals reports.

Buzz call for people who are not supported.

1. Will continue to be logged in the Buzz book. All buzz calls including from Housing Association residents who don't receive care or those which do not need to be attended are also logged using the 'ticker tape' device within the EC properties and basic reports can be pulled off as and when required.

Dignity Calls

1. These are additional calls that are charged for and are undertaken for a short period of time (1-3 days). Where possible these calls should be scheduled as additional one-off calls. Where it is not possible to schedule these visits, staff should "Scan QR" as normal to log a visit. If it does match to an existing visit, please let office staff know so they can remove.

Extra Care Breaks

1. Tags are set up for each EC location as follows 'Delacy Breaks' 'Sherwood Breaks'. These QR tags will be displayed in the staff room. Staff will need to tag in and out of their breaks in the staff room.

Extra Care Training

1. Tags are set up for each EC location as follows 'Delacy Training' 'Sherwood Training'. These QR tags will be displayed in the staff room. Staff will need to tag in and out of their breaks in the staff room.

What do I do when I need to cover someone else's visit?

1. Typically, this will be reorganised by the office staff however, for when it is not.
2. If you know the time of the visit and the location, then you can go to the property and "Scan QR" like normal. This will open the planned visit from the other person and all tasks. It will even mark it as complete on the original carers tablet.

Extra Care – I got to their flat and they were not there.

1. If you get to a client flat, open the door and see that the client is in not in their flat, find the visit on your tablet and enter a visit log type declined visit note. If within their allocated planned time, you end up finding them in another place such as the dinner hall or shop, go check on them, find out if they are ok. Once you have, go back onto your tablet, and find the allocated time visit for the person you recently put as a declined visit. Then add an additional visit log with the buzz call entry, explaining you found them "here" at this time and I spent X amount of time with them. Once you have done that, go to the office and ask them to put a time entry on the planned time that they originally declined. Then moving forward, see if that time is the right time for the client.

Version Control

Version	Change	Author	Date
V1	INITIAL START	SS	11/08/2023
V1.1	Changes: Added a few more process steps in the F&Q section	SS	19/09/2023
V1.2	Removed unplanned visits step by step. Included offline functionality. Included panic button	SS	20/09/2023
V1.3	Included further information about panic button	SS	25/09/2023
V1.4	Included client feedback/ visit log information/ progression	SS	20/10/2023
V1.5	Changed title (CM – CM Mobile to CM – Care Workers) to illustrate this booklet is for carers only. Added how to change default browser	SS	01/11/2023
V1.6	Added in a journal section. Added arrows instead of red boxes with numbers for clarity. Change "" to bold text to notify what is said in the system. Changed the name care workers to support assistants. Changed the title to CM – Support Assistant Guide	SS	20/11/2023
V1.7	Added another FAQ Changed the client outcomes section Adapted the visit logs and removed daily records sheet from there. Adapted the outcomes sections included any additional comments to explain this covers goals and daily record sheet.	SS	22/11/2023
V1.8	Rewritten the journal section outcome progression to make clearer. Removed table from said section and included screenshots with examples.	SS	17/01/2024