

User Guide

Home Care Manager 2.1.1 General Rostering Process

Version 6.0.0

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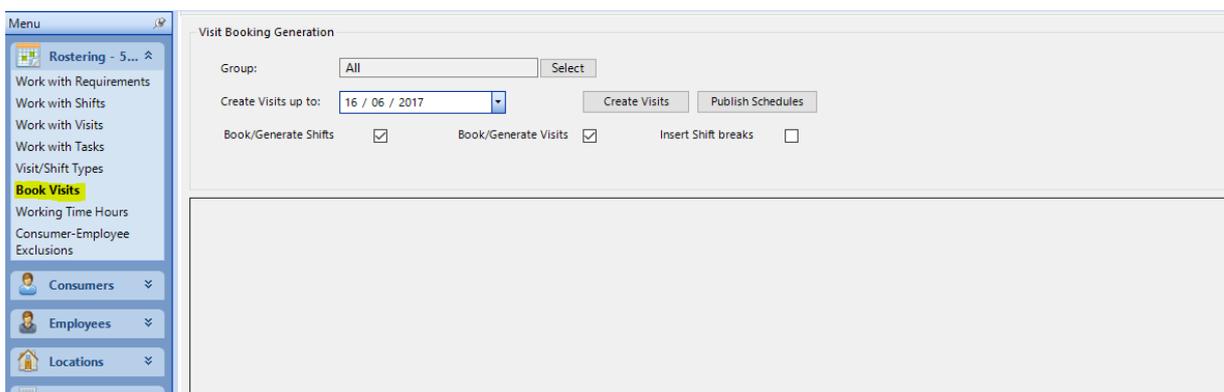
1 Active Rostering

Home Care Manager will book a list of shifts detailing when workers are available and a list of visits in which clients require care. If the worker has been set as the 'preferred worker' for a visit and has suitable availability, the worker will automatically be allocated to those visits. For those visits where a preferred worker has not been set, the visit will be scheduled with manual intervention required. Home Care Manager will assist to provide recommendations for the best worker to be allocated based on the Rostering Checks created.

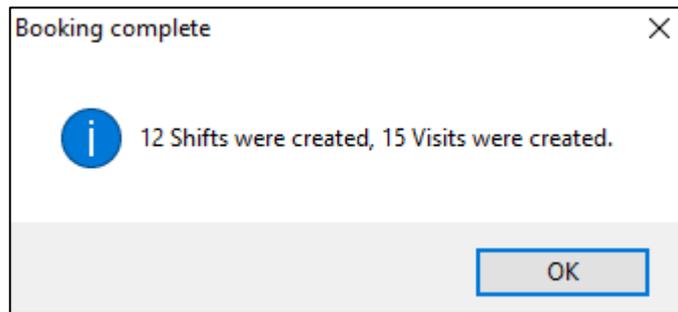
1.1 Visit Booking Generation

Navigate to **Rostering > Book Visits**

- **Group:** Select the Groups to be scheduled. 'All' is defaulted to generate all shifts and visits.
- **Create Visits up to:** Enter / select the date for all shifts and visits to be created up to (shifts and visits will be generated including the date selected).
- **Book/Generate Shifts:** The checkbox is defaulted to ticked. Keep the checkbox ticked to ensure shifts are generated.
- **Book/Generate Visits:** The checkbox is defaulted to ticked. Keep the checkbox ticked to ensure visits are generated.
- **Insert Shift Breaks:** This checkbox is defaulted to unticked. Tick this box if breaks have been configured to the system.
- **Create Visits:** Once the parameters have been set for the visit generation process, click 'Create Visits'. Home Care Manager will go through the generation process.



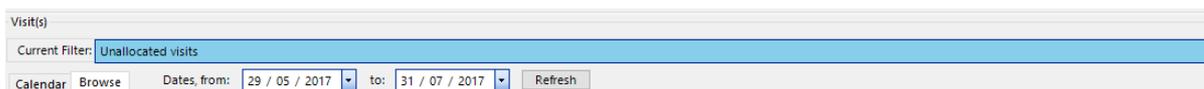
Once the process is completed, the following message will appear. Click 'OK'.



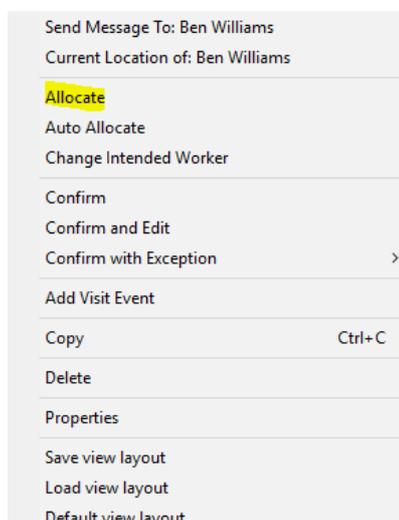
1.2 Work with Visits

Rostering > Work with Visits and select the date range that what just booked in the previous step

- At the top of the screen, select the date range for the roster period to be viewed.
- A list of all visits generated will be displayed.
 - A **Red** visit means there is no worker currently allocated. This may mean the preferred worker is unavailable for part or all of the visit, or a preferred worker was not selected prior to booking visits. These visits will need to be allocated to a worker if required.
 - A **White** visit means that a worker is allocated and therefore successfully rostered.
- **! TIP:** Change the 'Current Filter' at the top of the page to hide unwanted data (for example: select the filter 'Unallocated Visits' so that all **white** visits are hidden from view. This will display only the unallocated **Red** visits)



- Right click on a visit and select 'Allocate'.



- A list of workers is displayed in order of suitability to perform the visit based on availability and score results. The scores relate to the Rostering Checks configured in Home Care Manager.

Suitable Worker Search

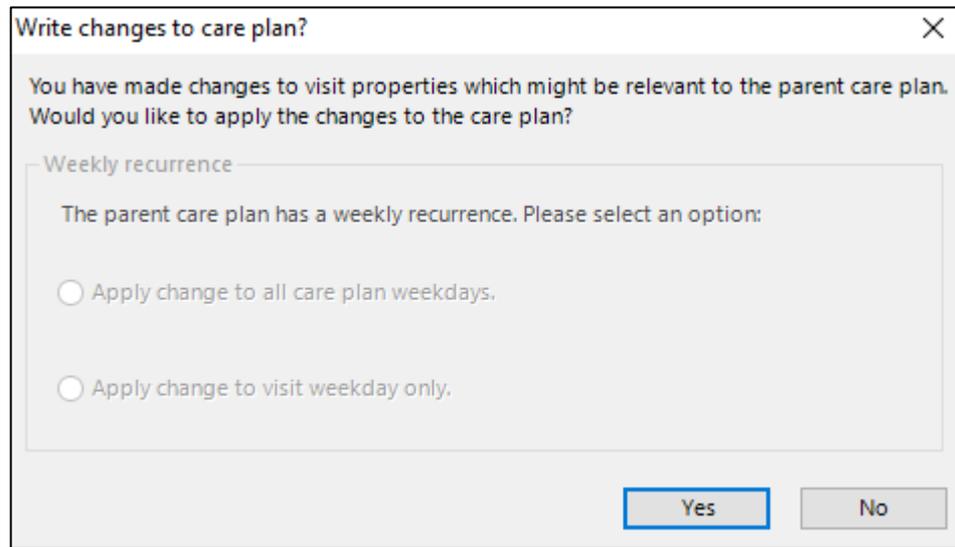
Current filter: Active | New | Only show best result for employees with multiple contracts

Drag a column header here to group by that column.

Alerts	Name	Grade/Type	Group	Telephone	Contracted?	Shift Type	Details Scores	Score
	Horton, Thomas	Registered Nur...	Place Holder	04129876543 (...)	Registered Nur...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (7); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2650
	CARDL, Mic...	Gardener	Place Holder	0411234567 (M...	Gardener	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (1); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2580
	DAILY, Sally	Social Worker	Place Holder	(Mobile)	Social Worker	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (7); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2390
	BROWN, Igor	Enrolled Nurse	Place Holder	0456789013 (M...	Place holder	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (1); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2380
	BRIGGS, June	Registered Nur...	Place Holder	0411876543 (M...	Registered Nur...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (7); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2380
	LEE, Jenny	Domestic Assis...	Place Holder	0423456789 (M...	Domestic Assis...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (1); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2380
	Michaels, Kosta	Enrolled Nurse	Place Holder	0432876432 (M...	Place holder	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has... Availability (9); Client exclusion (9); Worker Capabilities (7); Worker Checks (1); Employee Compatibility (3); Person Attribute...	2380
	Ben, Graham	Registered Nur...	Place Holder	0400987654 (M...	Registered Nur...	Standard Shift	[No shift but can create one]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preferenc... Availability (1); Client exclusion (9); Worker Capabilities (1); Worker Checks (1); Employee Compatibility (3); Person Attribute...	1660
	CANDLE, Jacqui	Personal Care...	Place Holder	0432123456 (M...	Personal Care...	Standard Shift	[No shift but can create one]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preferenc... Availability (1); Client exclusion (9); Worker Capabilities (1); Worker Checks (1); Employee Compatibility (3); Person Attribute...	1580
	GLENN, Thomas	Enrolled Nurse	Place Holder	0400868167 (M...			[No suitable contract found]; [No contract (0)];	0
	GRAY, June	Registered Nur...	Place Holder	0444567890 (M...	Registered Nur...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created]; [Availability (0)];	0
	Jackson, Terry	Domestic Assis...	Place Holder	(Mobile)	Domestic Assis...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created]; [Availability (0)];	0
	...	...	...	...	...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created];	0

- **Green** workers have an available shift and can be allocated to the visit.
- **White** workers are unavailable – currently do not have a shift, however you can create a shift for those workers. (Note: shifts will be created for the exact time of the visit to be allocated).
- **Red** workers are unavailable – this may be due to unavailability (already scheduled to another visit), or is excluded from performing the visit due to the Rostering Checks configured.
- Double click on a worker to allocate them to the visit. The visit will now appear as **white** – successfully scheduled.

- A prompt will appear to ask if the allocated worker should become the preferred worker for the visit. Select the correct bullet that applies if the worker is preferred or select 'No' to leave the preferred worker as is.



! TIP: On the Work with Visits screen, select multiple visits to be allocated at once by selecting the first visit and holding down the control key and then selecting other visits to allocate to the same worker.

Client to worker one-on-one visits must be allocated to a worker for the visit to be added to the workers' roster. If the visit remains red it will not appear on either a printed roster or on the Mobile Care Worker application.

1.2.1 Suitable Worker Search

Within the allocation screen, several tasks can be completed.

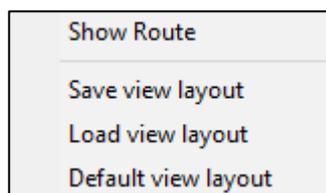
Suitable Worker Search

Current filter: Active Only show best result for employees with multiple contracts

Drag a column header here to group by that column.

Alerts	Name	Grade/Type	Group	Telephone	Contracted?	Shift Type	Details	Score
	Horton, Thomas	Registered Nur...	Place Holder	04129676543 (...)	Registered Nur...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2650
	CAROL, Mic...	Gardener	Place Holder	0411234567 (M...	Gardener	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2580
	DAILY, Sally	Social Worker	Place Holder	(Mobile)	Social Worker	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2390
	BROWN, Igor	Enrolled Nurse	Place Holder	0456789013 (M...	Place holder	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2380
	BRIGGS, June	Registered Nur...	Place Holder	0411876543 (M...	Registered Nur...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2380
	LEE, Jenny	Domestic Assis...	Place Holder	0423456789 (M...	Domestic Assis...	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2380
	Michaels, Kosta	Enrolled Nurse	Place Holder	0432876432 (M...	Place holder	Standard Shift	[Has shift]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preference]; [Consumer has...]	2380
	Ben, Graham	Registered Nur...	Place Holder	0400987654 (M...	Registered Nur...	Standard Shift	[No shift but can create one]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preferenc...]	1660
	CANDLE, Jacqui	Personal Care...	Place Holder	0432123456 (M...	Personal Care...	Standard Shift	[No shift but can create one]; [Not excluded]; [Visit has no required capabilities]; [Mandatory Checks Passed]; [No Preferenc...]	1580
	GLENN, Thomas	Enrolled Nurse	Place Holder	0400868167 (W...			[No suitable contract found]; No contract (0);	0
	GRAY, June	Registered Nur...	Place Holder	0444567890 (M...	Registered Nur...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created]; Availability (0);	0
	Jackson, Terry	Domestic Assis...	Place Holder	(Mobile)	Domestic Assis...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created]; Availability (0);	0
	...	...	...	...	...		[An Existing Shift is present which overlaps the Visit Times so No Shift can be created];	0

- **Show Route:** Right click on a worker and select 'Show Route'. A view of the route from the worker's previous visit the current visit will appear.



- **Client Information:** Click on the person icon to show information about the client.

Consumer (Mrs Joanne Smith)

Name and Address

Last name: Smith *

First name: Joanne

Title: [Dropdown]

Alias or friendly name: [Text]

Gender: [Dropdown]

Street Address: 6 Sydney Road

Suburb: Coburg

State: Victoria [Dropdown]

Postcode: 3058

Emergency Cont [Text]

GP/Medical Advisor [Text]

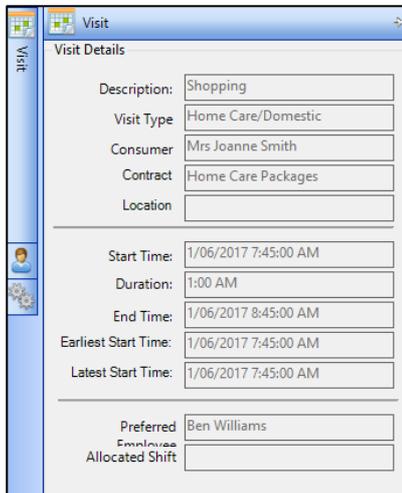
Social Worker [Text]

Mobile: (Mobile)

Home: 98765432 (Home)

Other: (Other)

- **Visit Information:** Click on the calendar icon to show information about the visit to be allocated.



Visit Details	
Description:	Shopping
Visit Type	Home Care/Domestic
Consumer	Mrs Joanne Smith
Contract	Home Care Packages
Location	
Start Time:	1/06/2017 7:45:00 AM
Duration:	1:00 AM
End Time:	1/06/2017 8:45:00 AM
Earliest Start Time:	1/06/2017 7:45:00 AM
Latest Start Time:	1/06/2017 7:45:00 AM
Preferred Employee	Ben Williams
Allocated Shift	

2 Ad-hoc Shifts and Visits

Ad-hoc shifts are shifts to be added to the existing list of booked shifts (for example: one-off availability, annual leave or one-off unavailability). Ad-hoc visits are created if there is a one-off instance of care required.

2.1 Ad-hoc Shift process

From the Workers menu, select the relevant worker and navigate to Shift Planning. The bottom section of the screen shows all booked shifts and is the location where ad-hoc shift occurrences are entered. Click New.

Normal Pattern of Work

Start	Finish	Type	Recurrence Pattern	Last Rostered	Ends	Description	Tag
07:30	16:00	Standard Shift	Occurs Daily	31/07/2017			
17:00	06:00	Standard Shift	Occurs Daily	31/07/2017			

Show Finished

Shift(s)

Calendar Browse Dates, from: 2 / 07 / 2017 to: 2 / 07 / 2017 Displaying 1 of 1 rows (show more)

Drag a column header here to group by that column.

Status	Start Time	End Time	Worker	Type	Group	Employee contra..	Description	Day	Tag
	02/07/2017 07:30	02/07/2017 16:00	Mr Bob Barnett	Standard Shift	Place Holder	Registered Nurse		Sunday	

To amend the details of an existing shift, e.g. to extend the time the worker is available, double click on the relevant shift to open Shift Properties.

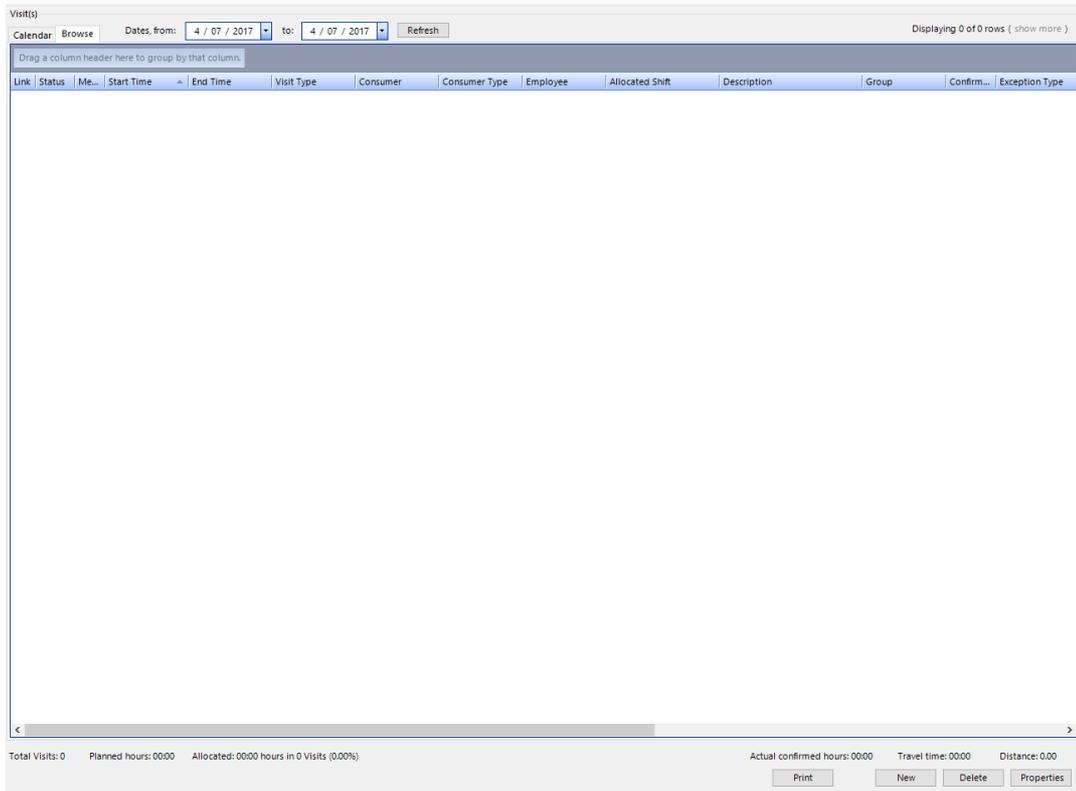
- Select the Shift Type that corresponds with the reason for adding an ad-hoc occurrence, e.g. annual leave, sick leave etc.
- Check the correct Worker Contract is selected (the workers contract will default here, however if the worker has multiple contracts, the correct contract should be selected for the shift being created).
- Select the Start and End times for the shift using 24-hour time format.
- Click OK to save the occurrence.

Note: If an available shift (can have visits allocated) for the same worker appears in the same time-frame as the unavailable ad-hoc shift, the unavailable shift will always override the shift previously recorded.

! TIP: When care workers are made unavailable for any reason any allocated visits they may have had will be deallocated and appear as red in the visit schedule. Any unallocated visits will need to be reallocated to a suitable worker.

2.2 Ad-hoc Visit process

From the Clients, select the relevant client and navigate to Visit Schedule. Click New.



Enter the data in the Visit Properties:

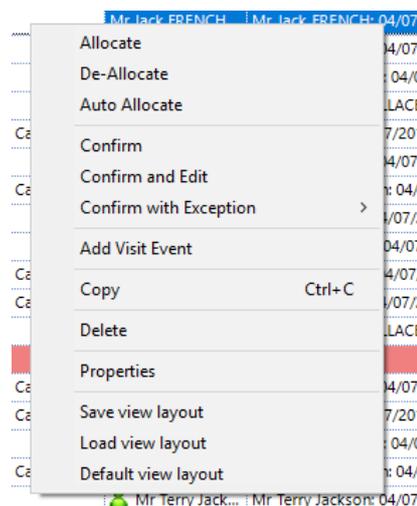
- Delivery tab – select Visit Type, ensure the correct Client is chosen, select suitable Contract add a Location and Tag if being utilised and is required for the ad-hoc visit being created.
- Select the date, time and duration of the visit
- Tasks tab – select tasks that are required for visit
- Workers tab – choose suitable worker to attend visit
- DSS tab – if the visit relates to a CHSP contract, enter the details for DSS reporting
- Click OK

3 Confirming Visits/Shifts Manually

Shift and visits need to be confirmed in order to be processed by a payroll or invoicing data export. Having both the shifts and visits confirmed is good practice and ensures accurate reporting functionality. If Mobile Care Worker is in use, shifts and visits will be confirmed automatically if they fall within any tolerance settings.

Navigate to either Rostering > Work with Visits or Rostering > Work with Shifts. The process is the same to confirm shifts or visits.

- Select a Date Range for the visits/shifts you wish to confirm and click Refresh. A list of visits/shifts within the date range are displayed.
- If the details of the relevant visit are correct, right click on the visit and click Confirm.



- If the visit details need to be amended, right click on the relevant visit and click Confirm and Edit. Update the details and click OK to save.
- If the visit did not occur as it should have or there is an exception that needs to be applied, right click on the relevant visit and select Confirm with Exception. Select the exception type required to identify the change or cancellation.

Note: It is important to understand which the Pay and Charge rules behind the exception to ensure the correct one is selected.

! TIP: It would be likely that if visits that did not actually occur will have been confirmed with an exception ahead of time to allow you workers to be rostered elsewhere should the need arise.

Once a visit is confirmed, it will display as Green, showing that the details contained within that visit are confirmed as being accurate. A confirmation of a visit using an exception will appear as a lighter shade of green to allow differentiation of visits.

Once a visit is confirmed, it then becomes available for payroll and invoicing data exports. Any visit/shift that has not been confirmed will not appear on payroll or invoicing data.

When confirming shifts only one option is available – Confirm. Any variations to a shift need to be dealt with by double clicking on the shift, make the adjustments required and click OK. Then right click on the shift and click Confirm.

4 Confirming Visits/Shifts with Visit Issues

For Mobile Care Worker clients only

If visits are completed by the Mobile Care Worker outside of the tolerances set, they will not automatically be confirmed and will appear in a list on the Visit Issues screen. All visits listed in the Visit Issues screen are required to be resolved to show as confirmed in the Visit Schedule.

Navigate to Mobile > Visit Issues and set a date range to review.

- Set the filter to view *All, Resolved, or Unresolved* issues.
 - To the visit in its entirety, click the Visit Properties button
- The left-hand list shows the visit issues with information about the visit (e.g. Visit Time, Client, Worker, Visit Type). Sort the list by clicking on the relevant heading to sort by.
- The right-hand pane shows details of the visit issue highlighted:
 - Planned details of the visit
 - Current status of the visit (confirmed or unconfirmed)
 - Mobile Event History (what time the device recorded start, end, etc.)
 - Visit Issue identifies the issue raised based on the settings and tolerances set up in Home Care Manager. Options are provided to resolve the issue based on what actually occurred, reverting back to the planned properties or making an individual decision to confirm the visit.

Visit issues

Filter: All Group: All Select Date range: 1 / 08 / 2015 to 19 / 11 / 2015

Drag a column header here to group by that column.

Issue time	Visit time	Client	Worker	Visit type
5/11/2015 8:52 AM	4/11/2015 3:30 PM-3:30 PM	Ms Claire Donk...	Miss Kelly Catfish	Home Care/Do...
22/10/2015 2:03 PM	20/10/2015 3:00 PM-5:00 PM	Ms Claire Donk...	Miss Kelly Catfish	Home Care/Do...
22/10/2015 12:03 PM	20/10/2015 1:30 PM-2:30 PM	Lemon Fruit	Miss Kelly Catfish	Personal Care
22/10/2015 12:00 PM	20/10/2015 10:00 AM-12:00 PM	Mr Peter Panda	Miss Kelly Catfish	Home Care/Do...
22/10/2015 11:13 AM	22/10/2015 3:00 PM-5:00 PM	Ms Claire Donk...	Miss Kelly Catfish	Home Care/Do...
22/10/2015 11:13 AM	22/10/2015 1:30 PM-2:30 PM	Lemon Fruit	Miss Kelly Catfish	Personal Care
16/09/2015 10:07 AM	16/09/2015 11:00 AM-12:00 PM	Marly Mouse	Mrs Cindy Tulip	Home Care/Do...
15/09/2015 2:38 PM	15/09/2015 1:30 PM-2:30 PM	Lemon Fruit	Miss Kelly Catfish	Personal Care
15/09/2015 2:29 PM	15/09/2015 10:00 AM-12:00 PM	Mr Peter Panda	Miss Kelly Catfish	Home Care/Do...
15/09/2015 12:54 PM	15/09/2015 1:00 PM-3:00 PM	Mrs Gail Toad	Mrs Cindy Tulip	Nursing Care
15/09/2015 12:44 PM	15/09/2015 10:00 AM-12:00 PM	Ms Mavis Poss...	Mrs Cindy Tulip	Home Care/Do...
15/09/2015 12:35 PM	14/09/2015 5:00 PM-6:00 PM	Ms Stacey Starf...	Mrs Cindy Tulip	Home Care/Do...
14/09/2015 3:10 PM	14/09/2015 2:00 PM-4:00 PM	Mrs Gail Toad	Mrs Cindy Tulip	Nursing Care
14/09/2015 2:54 PM	14/09/2015 11:00 AM-12:00 PM	Marly Mouse	Mrs Cindy Tulip	Home Care/Do...

Home Care/Domestic for Ms Claire Donkey

Planned time: 4/11/2015 3:30 PM-3:30 PM
 Planned care worker: Miss Kelly Catfish
 Status: Unconfirmed

[Visit properties](#) [Hide issues](#)

Mobile event history

Time	Description
5/11/2015 8:45 AM	Miss Kelly Catfish started the visit
5/11/2015 8:45 AM	Miss Kelly Catfish finished the visit
5/11/2015 8:52 AM	User admin resolved a tolerance issue by setting the preferred start time to Thursday, 5 November 2015 8:45 AM

Visit issues

Finished too late

Miss Kelly Catfish finished this visit too late, according to your tolerance settings.

Use actual time
 Thursday, 5 November 2015 8:45 AM

Use planned time
 Wednesday, 4 November 2015 3:30 PM

- Click Resolve to confirm the visit. The status of the issue will change to confirmed – ensuring that the visit is included in pay and invoice data exports.