

Quick Guide

How to schedule services to a Location

Services to Locations can be schedule from the clients plan of visits/visit schedule or the locations plan of visits/visit schedule. Workers will need to be allocated to client services at the Location through the Locations menu, as well as being allocated to Training/Meetings at an office location.

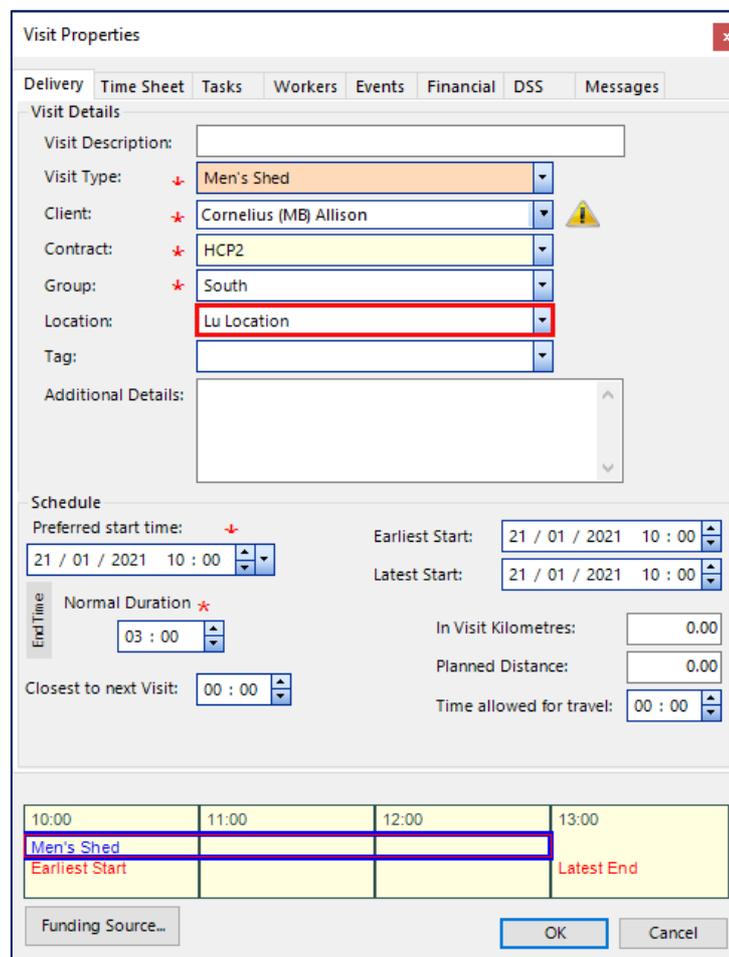
Services scheduled to a location remain unallocated (in red) due to the worker and client being allocated to the location rather than the worker allocated to the client.

1. Scheduling Location visits via Client

Services at Locations can be scheduled as recurring services within the Clients Care Plan or as an adhoc service within Visit Schedule.

Whether the service is to be set as a recurring service in the Care Plan or as an adhoc service in the Visit Schedule, when creating the new service to a location complete the Visit Properties as normal, but for the following:

- **Delivery Tab** – Select the Location where this service is to take place
- **Workers Tab** – Do not select a worker, as the worker will be allocated to a separate service via the Location menu



Visit Properties

Delivery | Time Sheet | Tasks | Workers | Events | Financial | DSS | Messages

Visit Details

Visit Description:

Visit Type: ↓ Men's Shed

Client: * Cornelius (MB) Allison 

Contract: * HCP2

Group: * South

Location: Lu Location

Tag:

Additional Details:

Schedule

Preferred start time: ↓ 21 / 01 / 2021 10 : 00

Earliest Start: 21 / 01 / 2021 10 : 00

Latest Start: 21 / 01 / 2021 10 : 00

Normal Duration *: 03 : 00

In Visit Kilometres: 0.00

Planned Distance: 0.00

Closest to next Visit: 00 : 00

Time allowed for travel: 00 : 00

10:00	11:00	12:00	13:00
Men's Shed			Latest End
Earliest Start			

Funding Source... OK Cancel

Plan of Visit Properties

Delivery Rostering Tasks **Workers** Events DSS

Preferred Worker Availability details:

Worker contract:

Found 8 Workers. Search

Available Workers

Search

Alerts	Worker	Suitability information	Type
	Ms Trish Brimelow	Availability=85%, Group=No, Type=1%	PCA
	Letitia Zoppo	Availability=71%, Group=No, Type=1%	PCA
	Maria Biggle	Availability=71%, Group=No, Type=1%	PCA
	Virginia Pedran	Availability=71%, Group=No, Type=1%	PCA
	Mr Frank Wesley	Availability=71%, Group=No, Type=1%	Brokered
	Lula Burgess	Availability=28%, Group=Yes, Type=1%	PCA
	Mazuan Bathusha	Availability=28%, Group=No, Type=1%	Brokered
	Mariluz Bravo	Availability=14%, Group=No, Type=1%	PCA

10:00
Yarn Group
Enter Start

10:30

OK Cancel

Browse Suspensions

Funding Sources

Name	Contract	Started	Ended	Next Review	Expires	Last Rostered	Cessation Reason
HCP Lvl 2	HCP2	3/09/2020		21/01/2021		31/01/2021	

Show Finished Funding Source(s) Book Visits Wizard New Delete Proper

Plan of Visits

List of Plan of Visits Plan of Visit Calendar

Drag a column header here to group by that column.

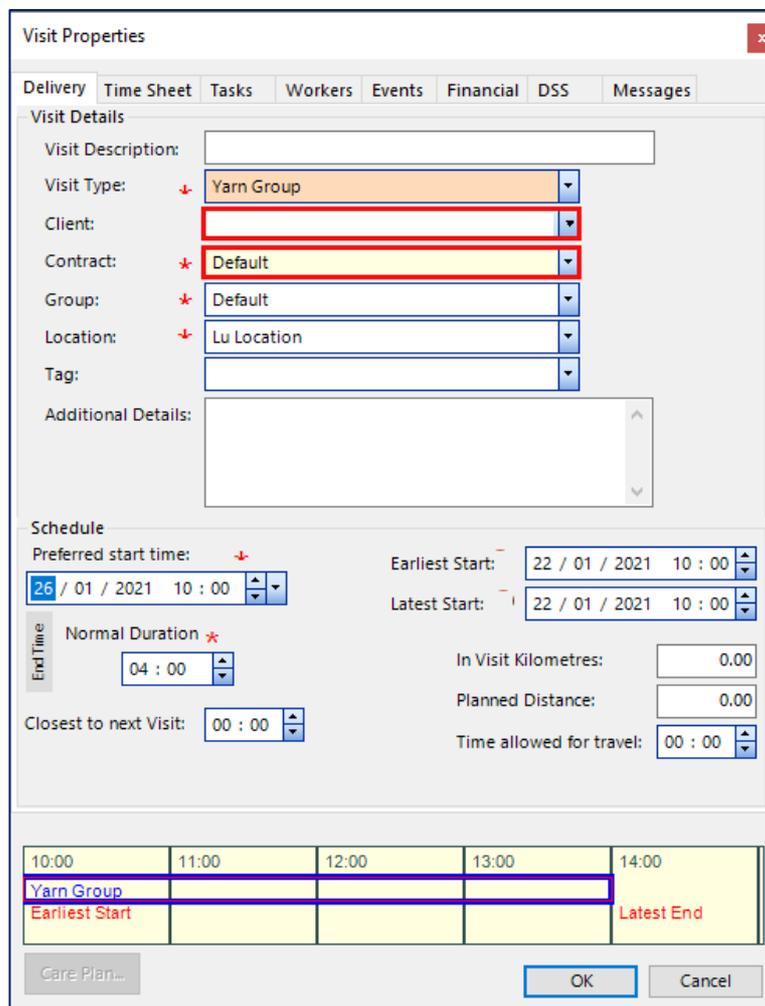
Link	Start Time	End Time	Description	Visit Type	Recurrence pattern	Last Rostered	Worker	Recurrence Type	Recurrence Start	Recurrence End
	07:25	07:40		Med Prompt	Occurs Weekly on Monday,...	31/01/2021	Marsha Copeland	Weekly	03/09/2020	
	08:30	10:00		Personal Care	Occurs Weekly on Monday,...	31/01/2021	Marsha Copeland	Weekly	03/09/2020	
	10:00	13:00		Men's Shed	Occurs Every 2 weeks on Th...	31/01/2021		Weekly	21/01/2021	
	14:00	16:00		Home Care/Dom...	Occurs Weekly on Monday,...	31/01/2021	Lula Burgess	Weekly	03/09/2020	
	19:30	20:30		Personal Care	Occurs Weekly on Monday,...	31/01/2021	Marsha Copeland	Weekly	03/09/2020	

2. Scheduling Location visits via Locations

Scheduling services to locations for clients can also be set up in Locations, where services may be capped. If services are capped, in this example it is assumed services are capped at a Location to maximum of 10 clients, these 10 services can be set up without clients being allocated to them – as clients call to attend this service, the service under Location can be updated to be allocated to the client and the client’s contract/funding.

Create the capped services as adhoc services within the Location > Visit Schedule as normal, but for the following:

- **Delivery Tab**
 - Do not select a client
 - Select Default/PlaceHolder contract – the contract will be updated once the client has been allocated to this service
- **Workers Tab** – Do not select the worker as a separate service will need to be created for the Worker



Visit Properties
✕

Delivery
Time Sheet
Tasks
Workers
Events
Financial
DSS
Messages

Preferred Worker

Worker contract:

Availability details:

Available Workers

Use the Allocate button to see a list of Suitable Workers:

Allocate

10:00	11:00	12:00	13:00	14:00
Yarn Group				
Earliest Start				Latest End

Care Plan...

OK

Cancel

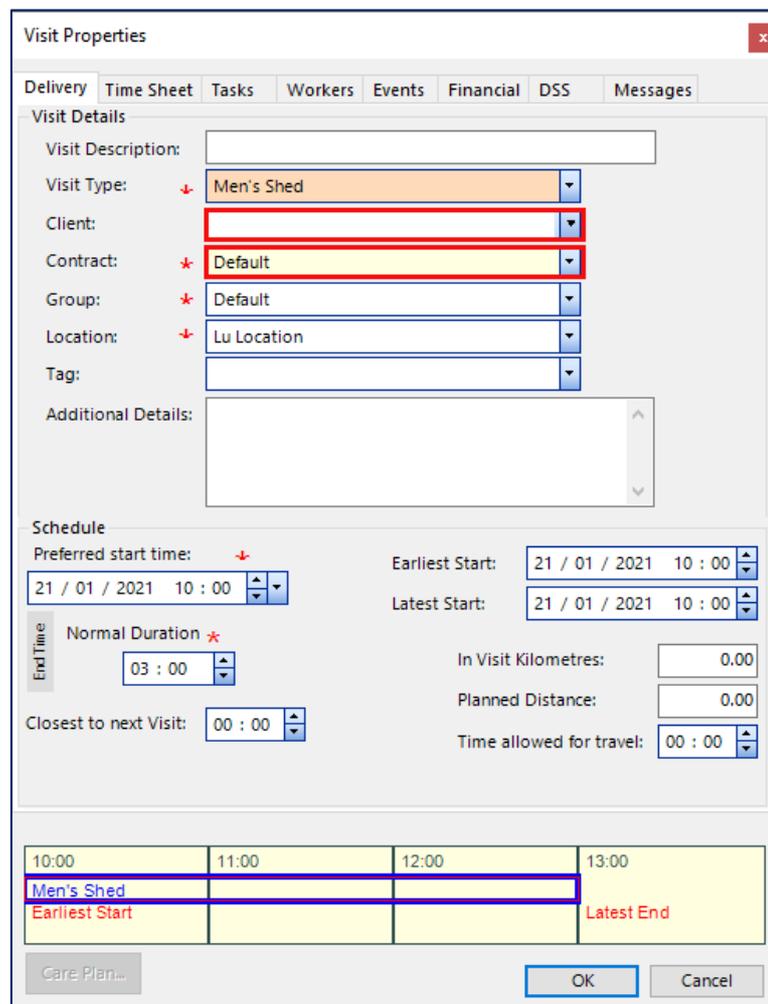
Allocating Workers to Location Services

Where there are multiple clients attending a group service with one-two workers – it is best practice to create the service in the Locations Visit Schedule and to allocate the worker to this one service, rather than double booking worker/s for all clients attending. Workers can also be allocated to Training/Meeting ‘services’, within a Location Care Plan named Staff Training / Staff Meeting, where clients do not need to be selected.

NB: Only one worker can be allocated to a service, if there are multiple workers, a service for each worker will need to be created.

In Locations > Visit Schedule create the visits as normal, but for the following:

- **Delivery Tab**
 - Do not select the Client
 - Select Default/Place Holder as no specific contract/funding is required for the worker or location
- **Workers Tab**
 - Ensure to allocate a worker to this service – the worker will see on Mobile Care Worker where they are supposed to be and for what service



Visit Properties

Delivery | Time Sheet | Tasks | Workers | Events | Financial | DSS | Messages

Visit Details

Visit Description:

Visit Type: - Men's Shed

Client:

Contract: * Default

Group: * Default

Location: - Lu Location

Tag:

Additional Details:

Schedule

Preferred start time: - 21 / 01 / 2021 10 : 00

Earliest Start: 21 / 01 / 2021 10 : 00

Latest Start: 21 / 01 / 2021 10 : 00

Normal Duration * 03 : 00

In Visit Kilometres: 0.00

Planned Distance: 0.00

Closest to next Visit: 00 : 00

Time allowed for travel: 00 : 00

10:00	11:00	12:00	13:00
Men's Shed			Latest End
Earliest Start			

Care Plan... OK Cancel

Visit Properties
✕

Delivery
Time Sheet
Tasks
Workers
Events
Financial
DSS
Messages

Preferred Worker	Availability details:
Mr Frank Wesley	Mr Frank Wesley: 21/01/2021 08:30 - 21/01/2021 17:30
Worker contract:	PCA Contract

Available Workers

Use the Allocate button to see a list of Suitable Workers: Allocate

10:00	11:00	12:00	13:00
Men's Shed			
Earliest Start			Latest End

Care Plan...
OK
Cancel