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.

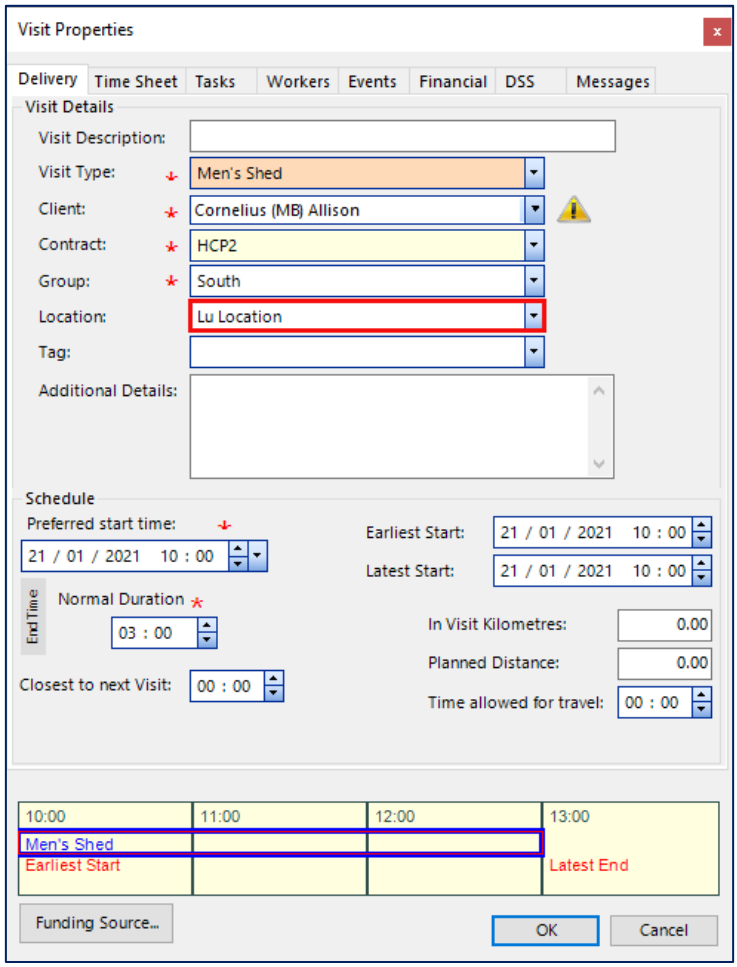
Services scheduled to a location remain unallocated (in red) due to the worker and client being allocated to the location rather than the worker allocated to the client.

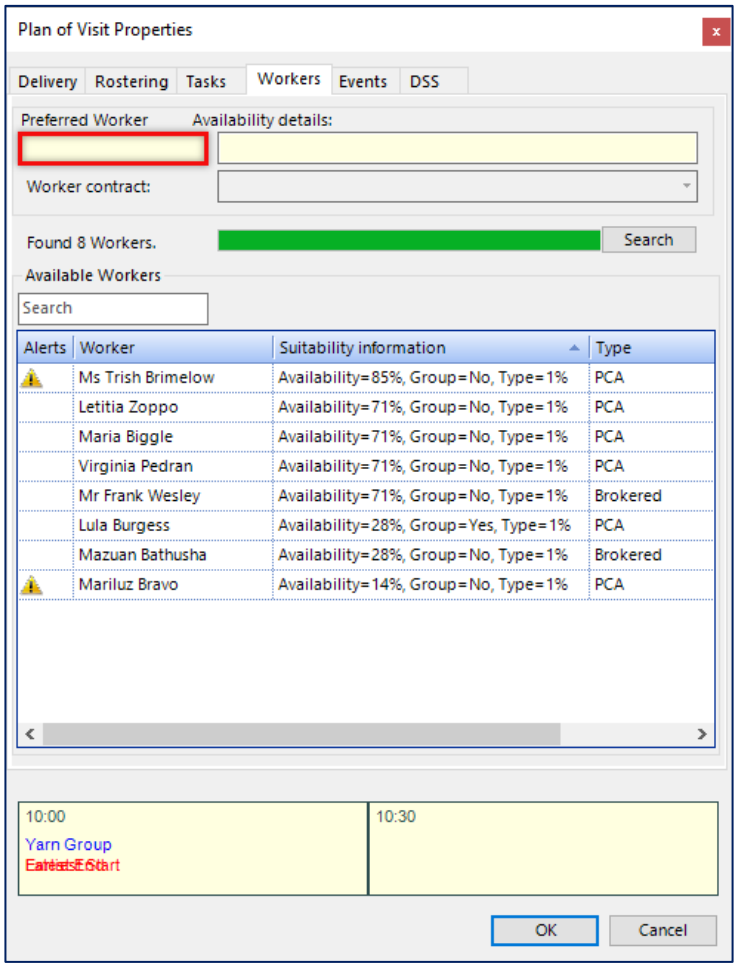
1. Scheduling Location visits via Client

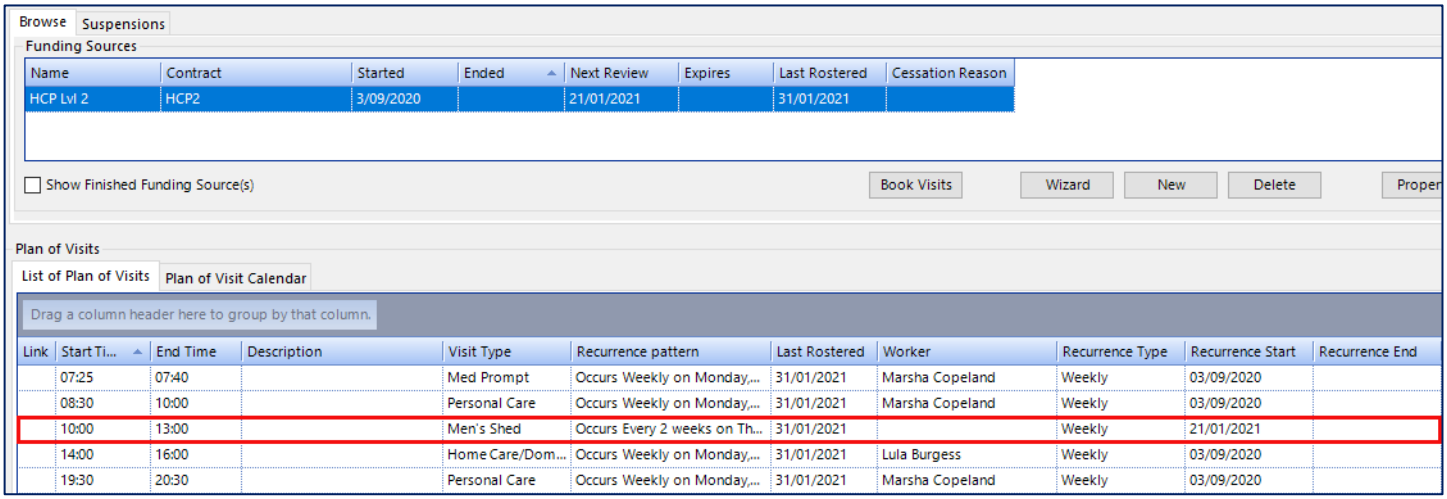
Services at Locations can be scheduled as recurring services within the Clients Care Plan or as an adhoc service within Visit Schedule.

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







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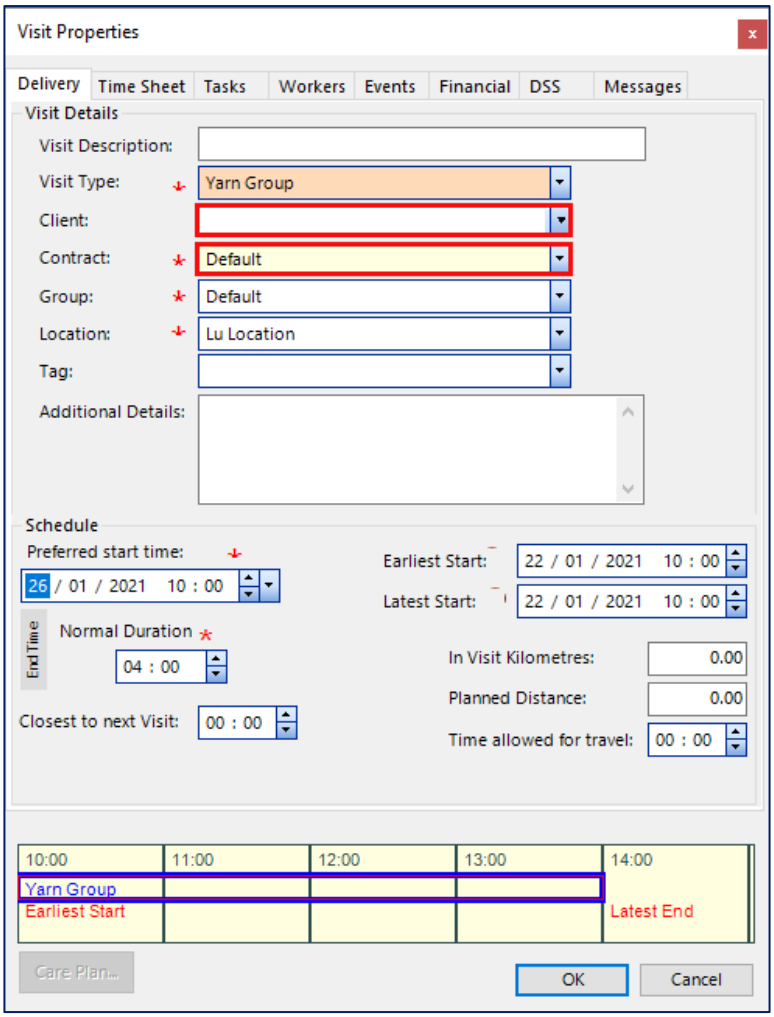
2. Scheduling Location visits via Locations

Scheduling services to locations for clients can also be set up in Locations, where services may be are 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



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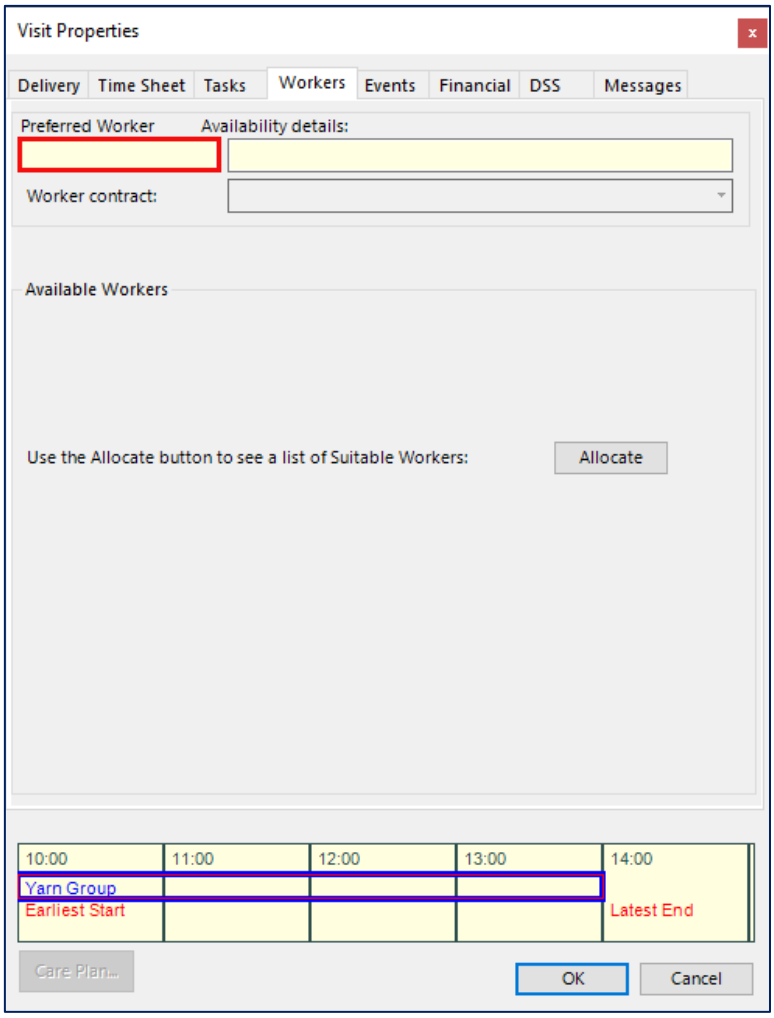

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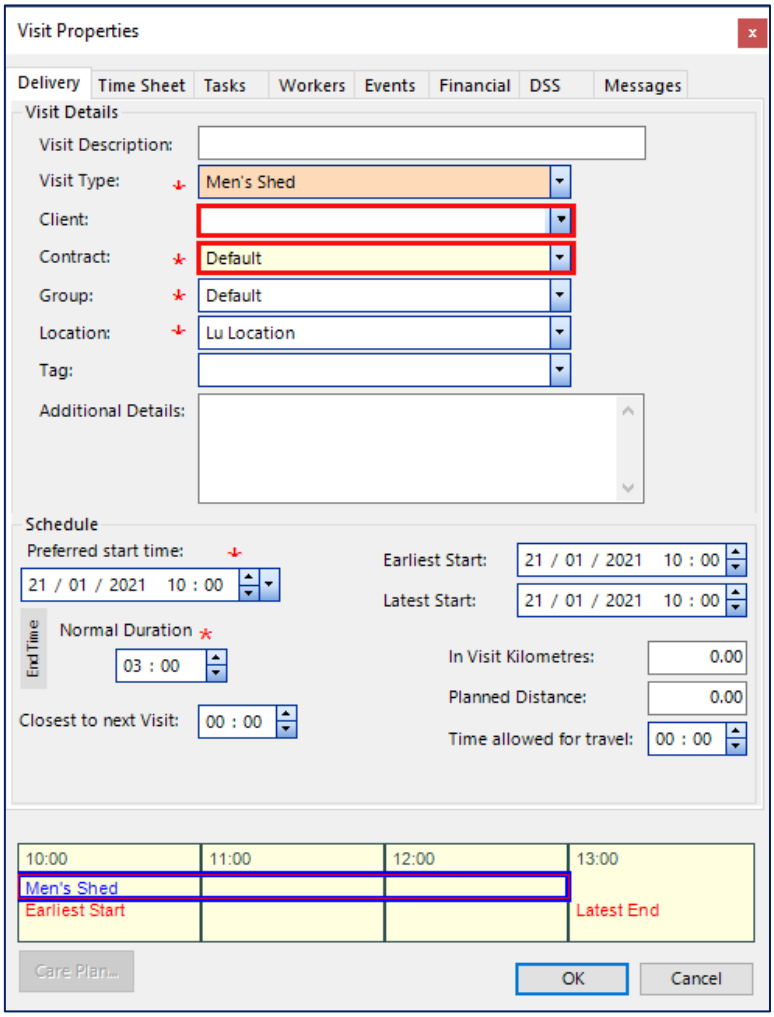
Allocating Workers to Location Services

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



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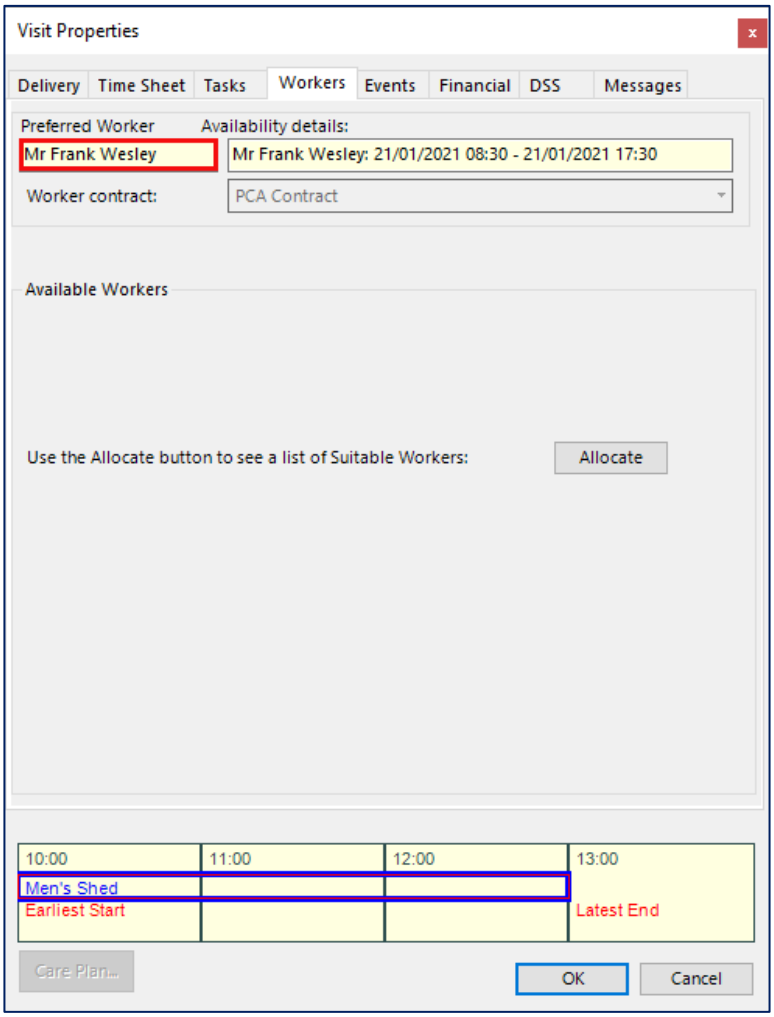

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