

Using the CarePlanner Mobile App

CARER VERSION 1.1.

March 2022

Change Log

Version	Summary	Edit by
1.1	Updated Styling	J Stanley
1.0	Initial document creation	J Stanley

Purpose of document

- This document accompanies the *CarePlanner Mobile App User Guide for Admins*.
- It will focus on features within the mobile app and how carers can utilise them

Contents

- [Setting up the app](#)
- [Appointment List Screen](#)
- [Appointment Summary Tab](#)
- [Notebook Tab](#)
- [Info Tab](#)
- [Contacts Tab](#)
- [Scheduled Appointments \(Call Monitoring\)](#)
- [Writing Notes](#)
- [Recording Medication Outcomes](#)
- [Tasks](#)
- [Ending Appointments](#)
- [Notifications & Warnings](#)
- [App Support](#)
- [Stay up to date](#)

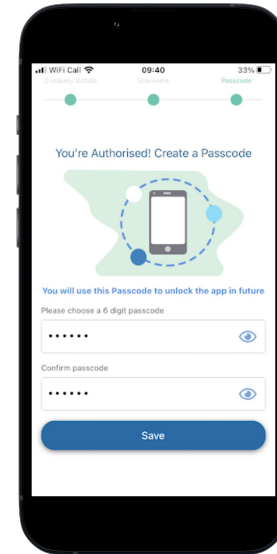
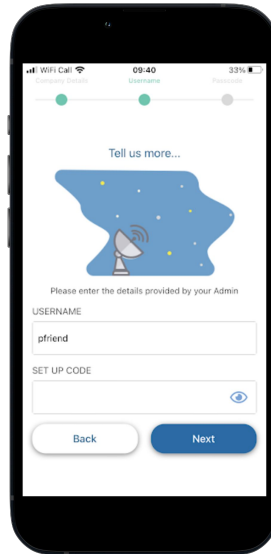
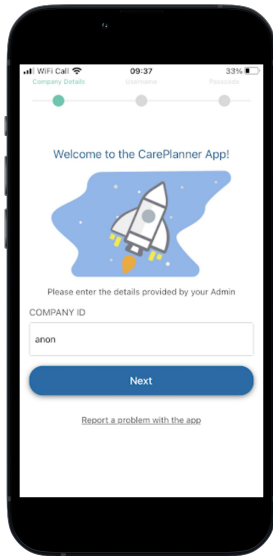


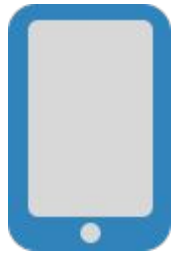
Setting up the app

Instructions for getting started with the CarePlanner mobile app

Setting up the app

Enter your Company ID and Username as provided by your administrator. Then choose a password, which you will use every time you log into the app.

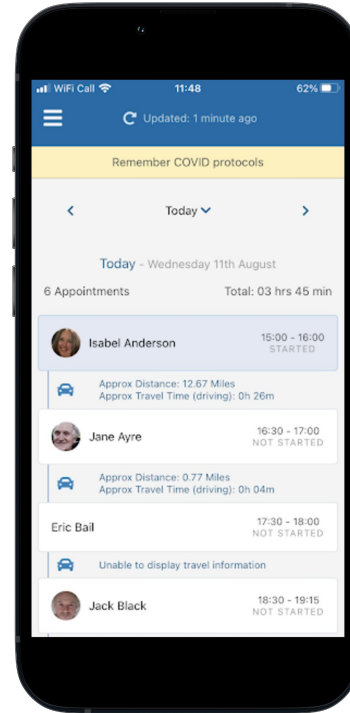




Appointment List Screen

Appointment List Screen

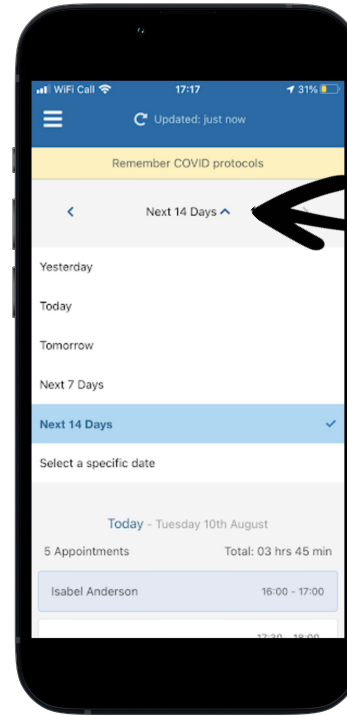
- You will be able to see a summary of your appointments for the day when you first log into the app.
- You can click on an appointment to view more information about it.
- You will see approximate time and distances between appointments (can be switched on and off in App Settings).



Appointment List Screen

You can use the date filter to choose between seeing appointments for:

- Yesterday
- Today
- Tomorrow
- The next 7 days
- The next 14 days
- A specific date of your choice

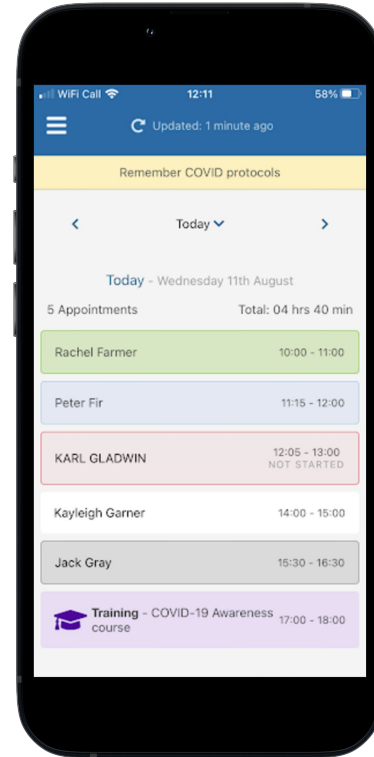


Tap the arrow to open the date filter dropdown

Appointment List Screen

Appointments are colour coded according to their status:

Colour	Status
White	Unstarted
Red	Late to be started
Light Blue	In Progress
Green	Complete
Pink	Training Event
Grey	Cancelled
Dark Blue	Unplanned

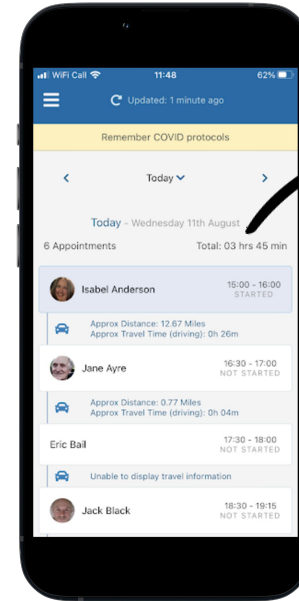
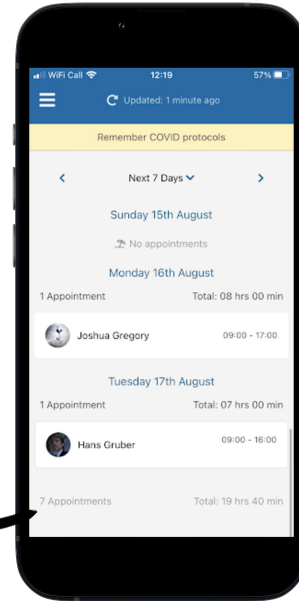


Appointment List Screen

If switched on in the settings, you will see the total number of appointments and total scheduled time of appointments, per day.

When using the 7 or 14 day options, you will see the totals for the entire 7/14 days at the end of the appointment list.

7/14 day totals



Daily totals

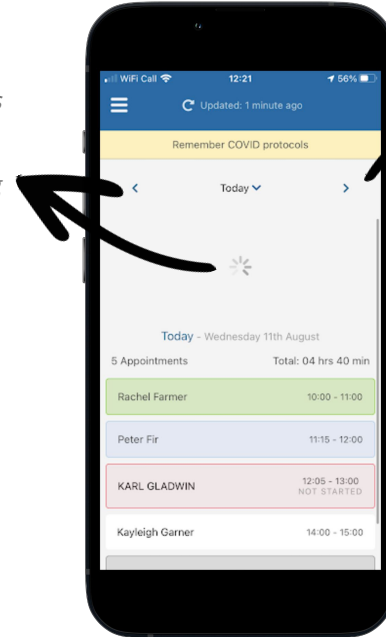


Appointment List Screen

Press the refresh icon at the top of your page or pull your list of appointments down to refresh the page and return the latest appointment information.

You can use the arrow buttons to quickly switch between date filter options.

Spinner shows that the appointment list is updating



Use the arrows to switch between date options



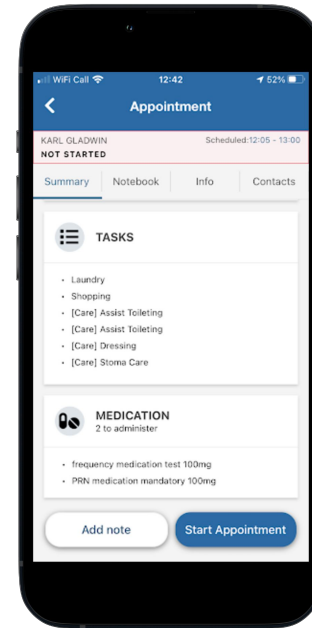
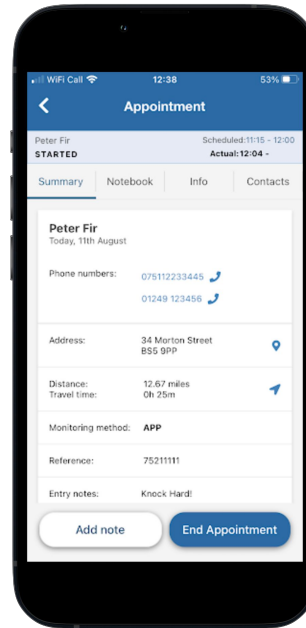
Appointment Summary Tab

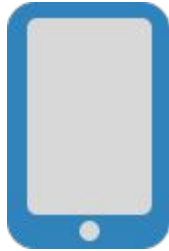
Appointment Summary Tab

When you select an appointment, you will see further details about the appointment.

Which details you see will be determined by your admins, but can include information about the client, or about other carers that are attending.

You will also see details of Tasks and Medications which are required to be completed during the appointment, and any applicable handover notes.





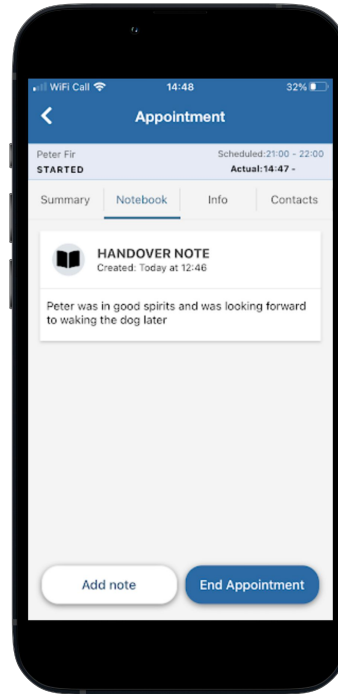
Notebook Tab

Notebook Tab

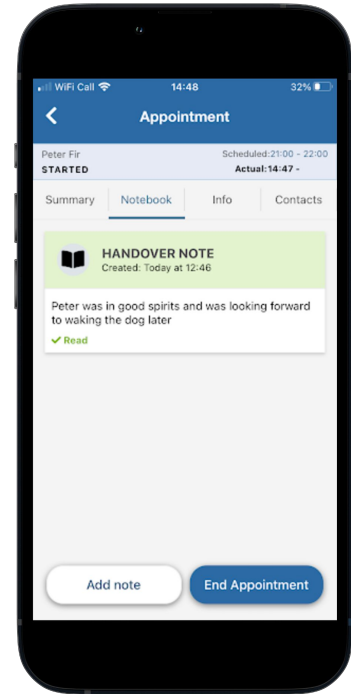
The Notebook tab shows any handover notes that were written by other carers (or yourself if applicable), as well as any other notes that admins have enabled you to see about the client/appointment.

Notes turn green when they have been opened so that it is clear which notes you have not read previously.

Unread



Read





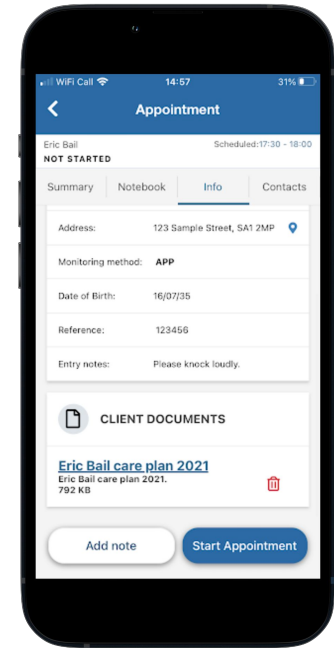
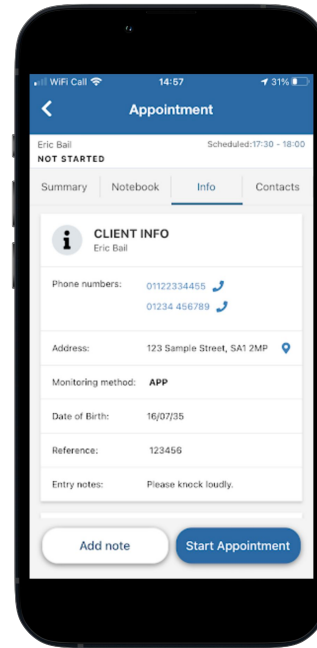
Info Tab

Info Tab

The Info tab shows useful information such as Medical Notes, Entry Notes, and Date of Birth for the client.

You can also download and view the client's Care Plan, if designated by your admins.

These sections will be used by admins to keep you up to date with ongoing information about the client and any updates you should be aware of.

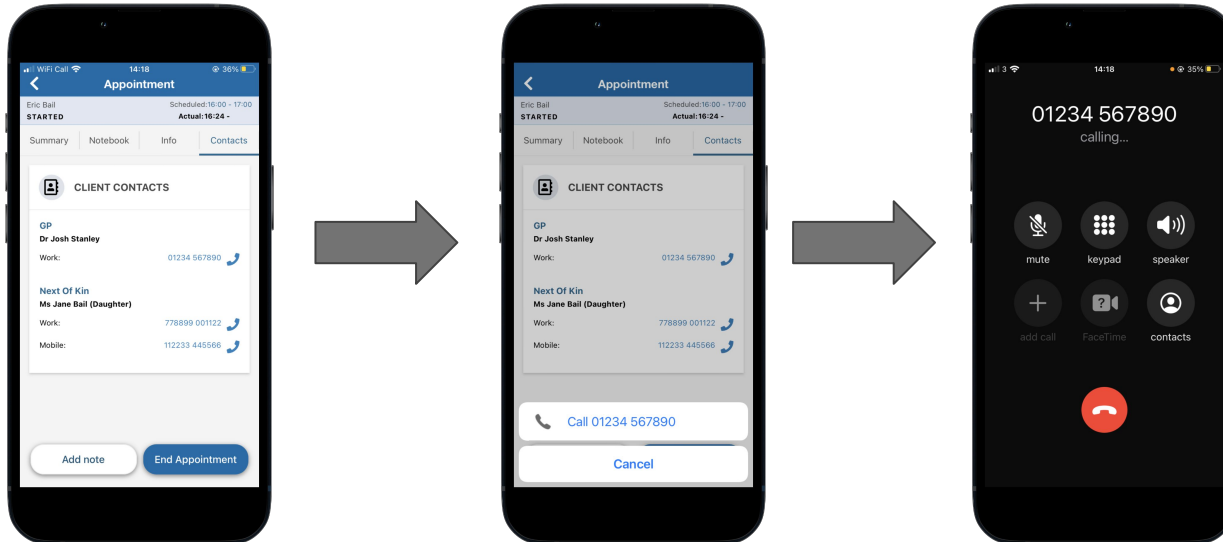


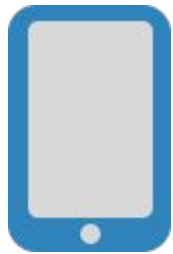


Contacts Tab

Contacts Tab

Contact details that your admins has chosen to display will be shown in the contact tab. Selecting a phone number enables you to call the contacts directly from the app.



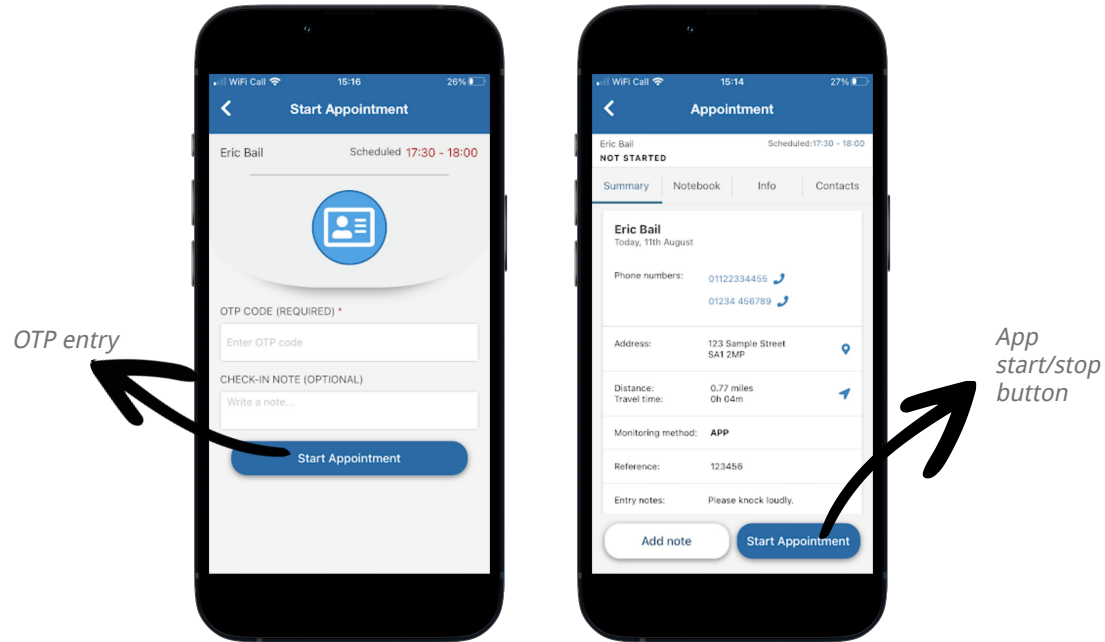


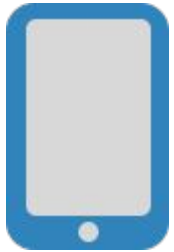
Scheduled Appointments (Call Monitoring)

Call Monitoring

There are a number of ways that 'Call Monitored' appointments can be started and stopped (and may vary from client to client):

- App Start Stop button
- OTP (One time password) entry devices)
- Holding your device against an NFC tag
- Using the client's landline to return a password





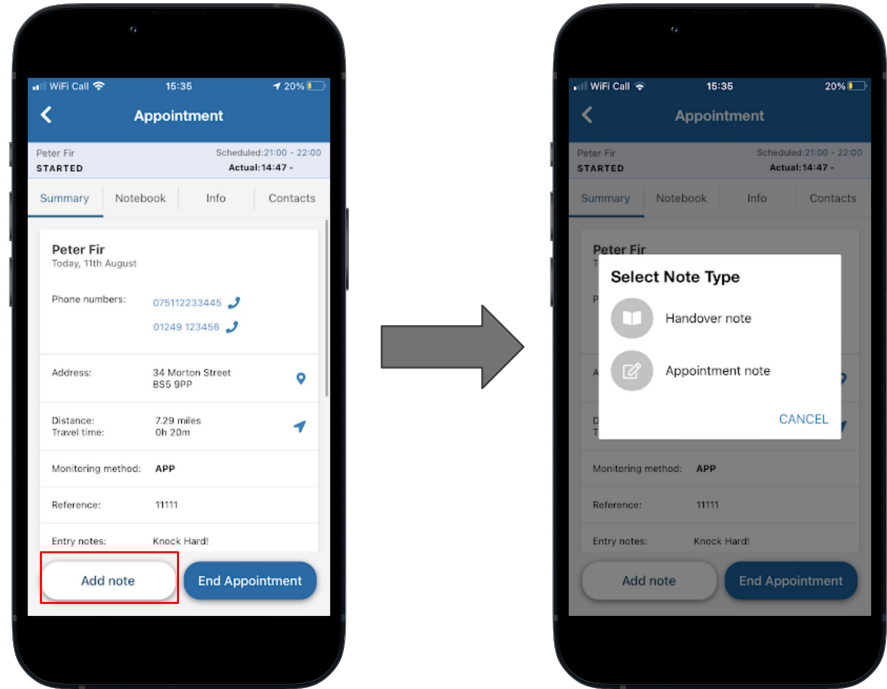
Writing Notes

Writing notes

If your admins have enabled the appropriate settings, you can add either an Appointment Note or Handover Note during an appointment.

Appointment Notes are sent to admins (who may choose to make the note visible to other carers).

Handover notes are displayed to other carers (and admins).

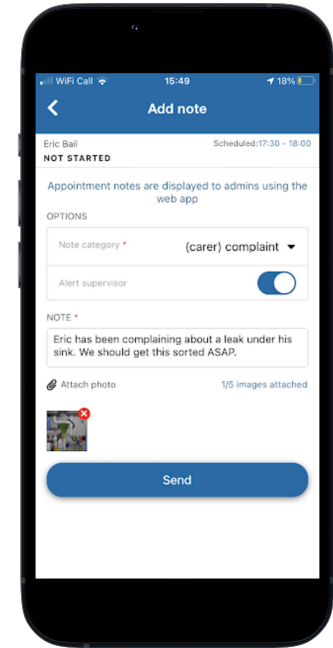
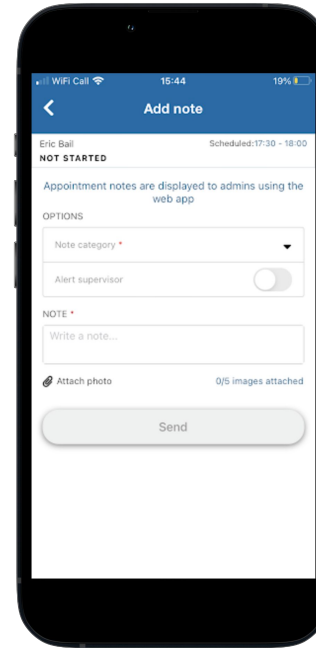


Appointment notes

When adding an Appointment Note, you must select a category for the note. The possible categories will be defined by your admins.

You can choose if you want Appointment Notes to alert a supervisor. If this option is selected, a notification will immediately be displayed to admins using the CarePlanner admin system.

You can add up to 5 images to Appointment Notes.



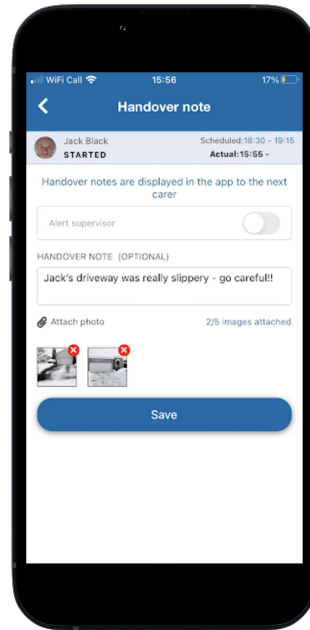
Handover notes

You can create a Handover Note at any time during an appointment and it can be edited throughout the appointment, if necessary.

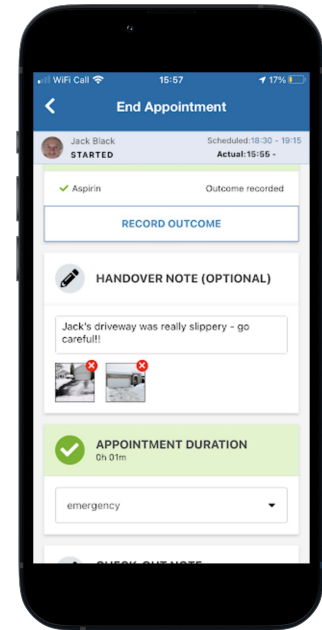
As with Appointment Notes, you can select to alert supervisors and add images if necessary.

Handover Notes are also displayed on the End Appointment screen, so you can check what you have written before it is sent.

During appointment



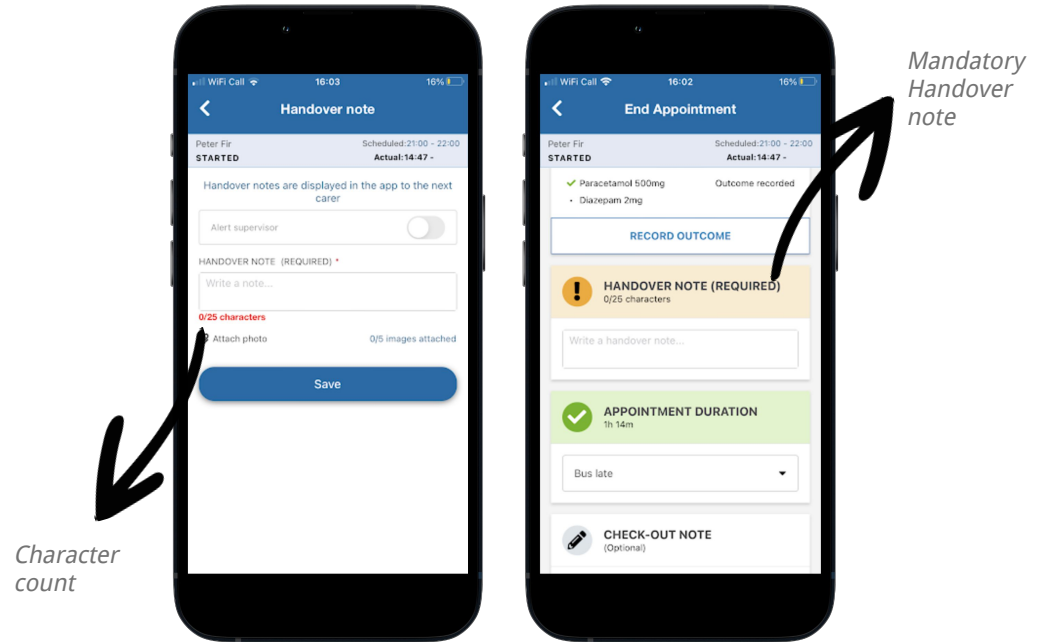
End of appointment



Handover notes

Your admins may have enabled a setting which makes adding a handover note mandatory.

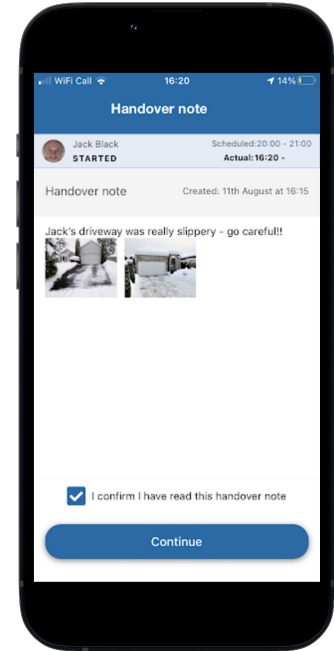
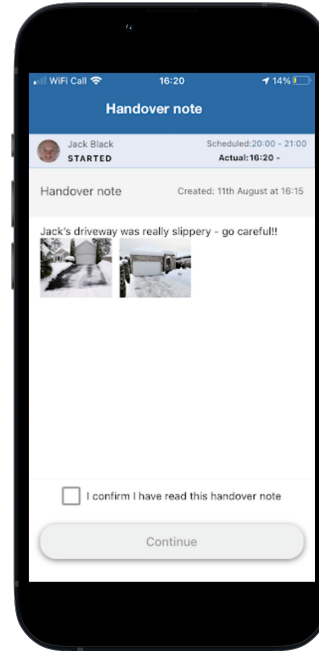
When this setting is enabled, you will need to ensure that you have added a note that is at least 25 characters long to be able to end the appointment.

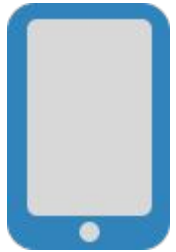


Handover notes

Admins can also enable an option which asks you to confirm that you have read a previous handover note before you can begin an appointment.

If this is the case, make sure you have read the handover note before you select the confirmation tick-box and press continue.





Recording Medication Outcomes

Recording Medication Outcomes

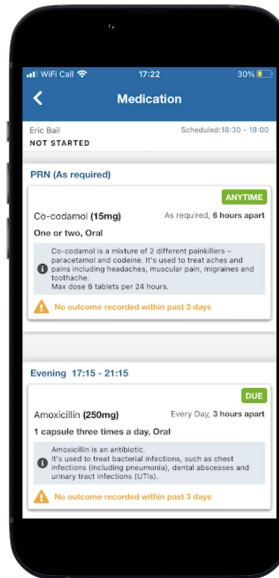
If your admins have chosen to use CarePlanner's eMAR functionality, medications that that can or should be administered during the appointment will be displayed.

You have the ability to record the outcome of each medication administration.

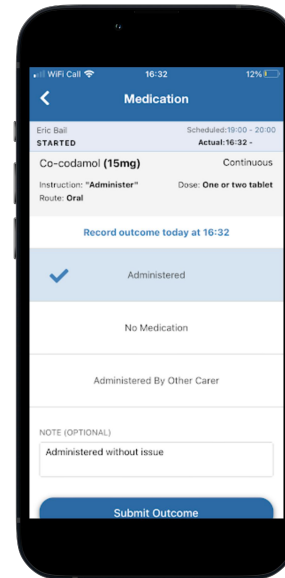
Simply click on the medication you have administered, input any notes you wish to record and select the appropriate outcome.

Outcomes are set on a per-medication basis by your admins, so you may have different options to choose from depending on the medication and client.

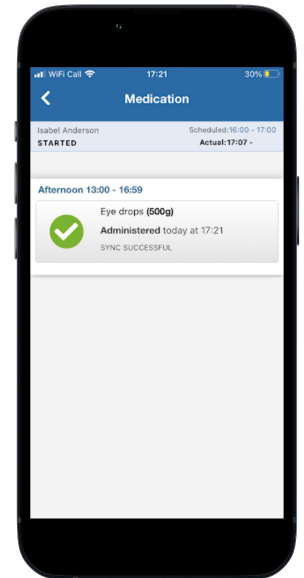
Medications List

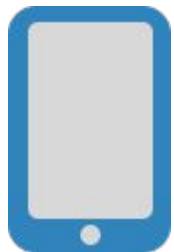


Administration Screen



Completed administration



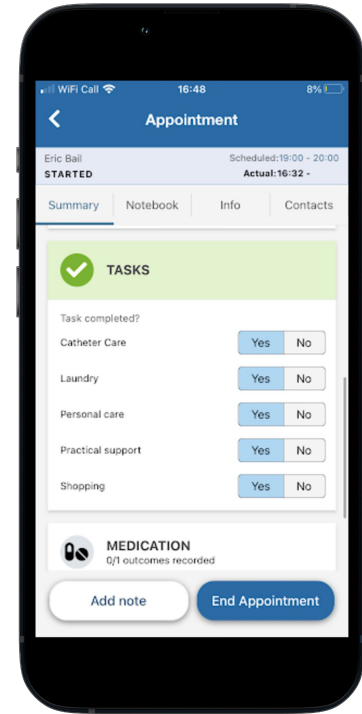
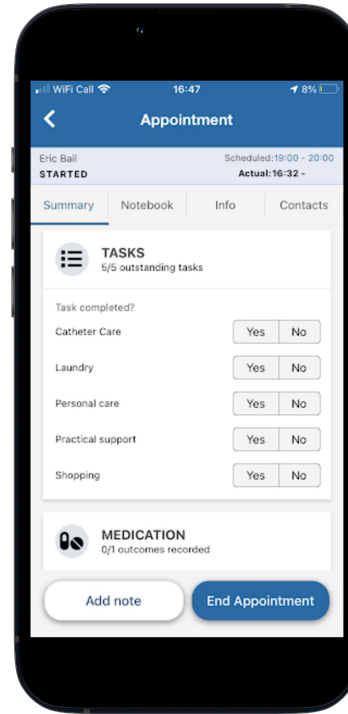


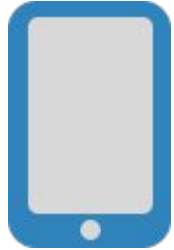
Tasks

Tasks

Admins may assign Tasks for you to complete during an appointment.

For Call Monitored appointments, you must confirm if each task has been completed or not.





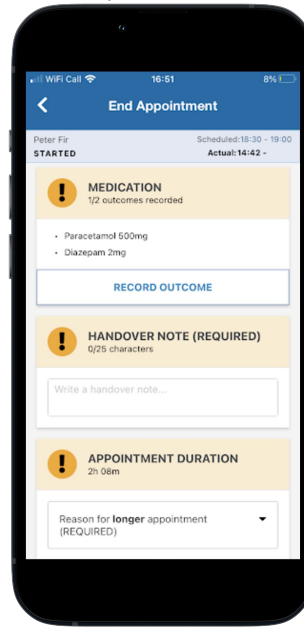
Ending Appointments

Ending Appointments

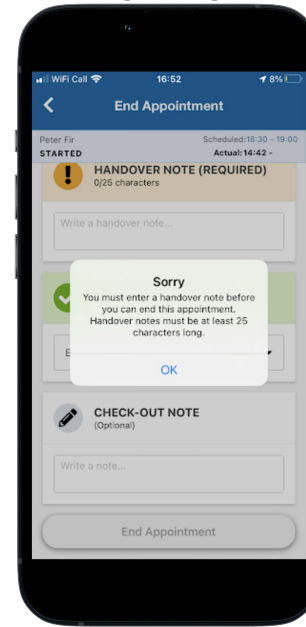
When you select the 'End Appointment' button, you will be taken to the End Appointment screen.

Any outstanding requirements (e.g. tasks, medications, mandatory handover notes) will be displayed with a warning icon, and you will not be able to end the appointment until they have been completed.

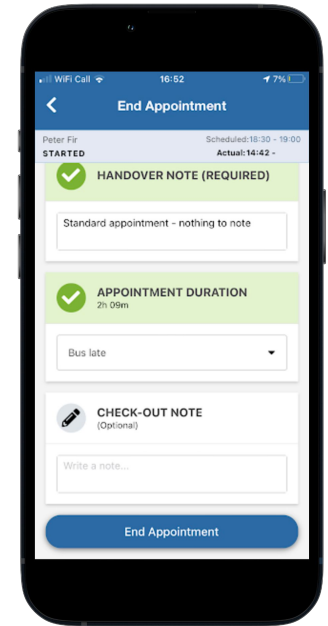
Incomplete items

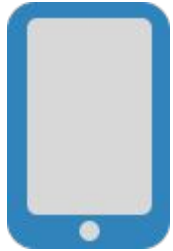


Warning message



All items complete



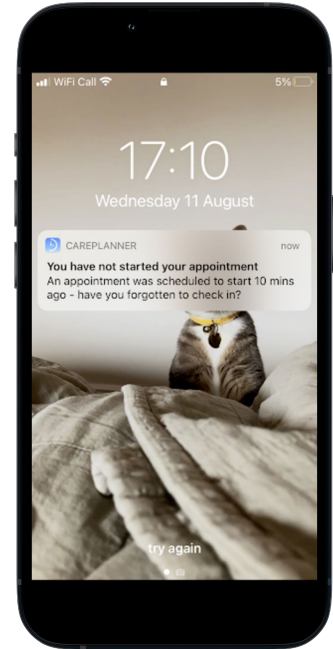
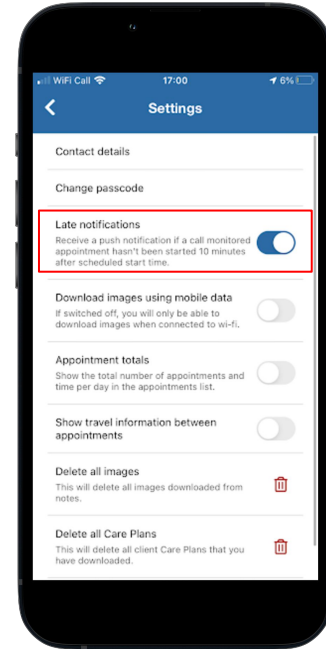


Notifications & Warnings

Notifications & Warnings

If enabled in the App Settings, you will receive push notifications to your device to warn you if an appointment has not yet been started 10 minutes after the scheduled start time.

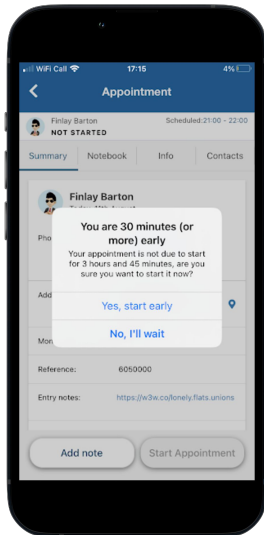
Push notifications must also be enabled for the app in your device settings to be able to use this function.



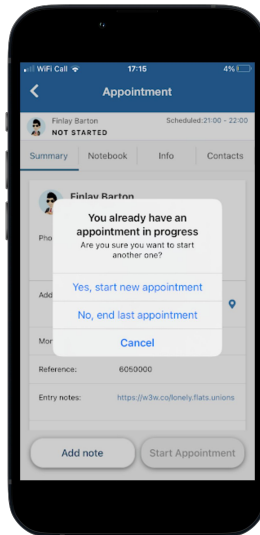
Notifications & Warnings

To ensure that appointments are correctly recorded, warnings appear in other scenarios.

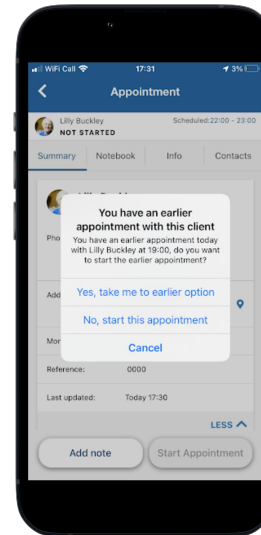
Attempting to start an appointment 30 mins (or more) early

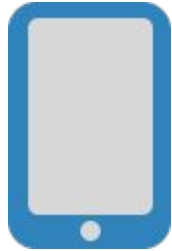


Attempting to start an appointment while another is still in progress



Attempting to start an appointment with a client whom there is an earlier unstarted appointment with that day

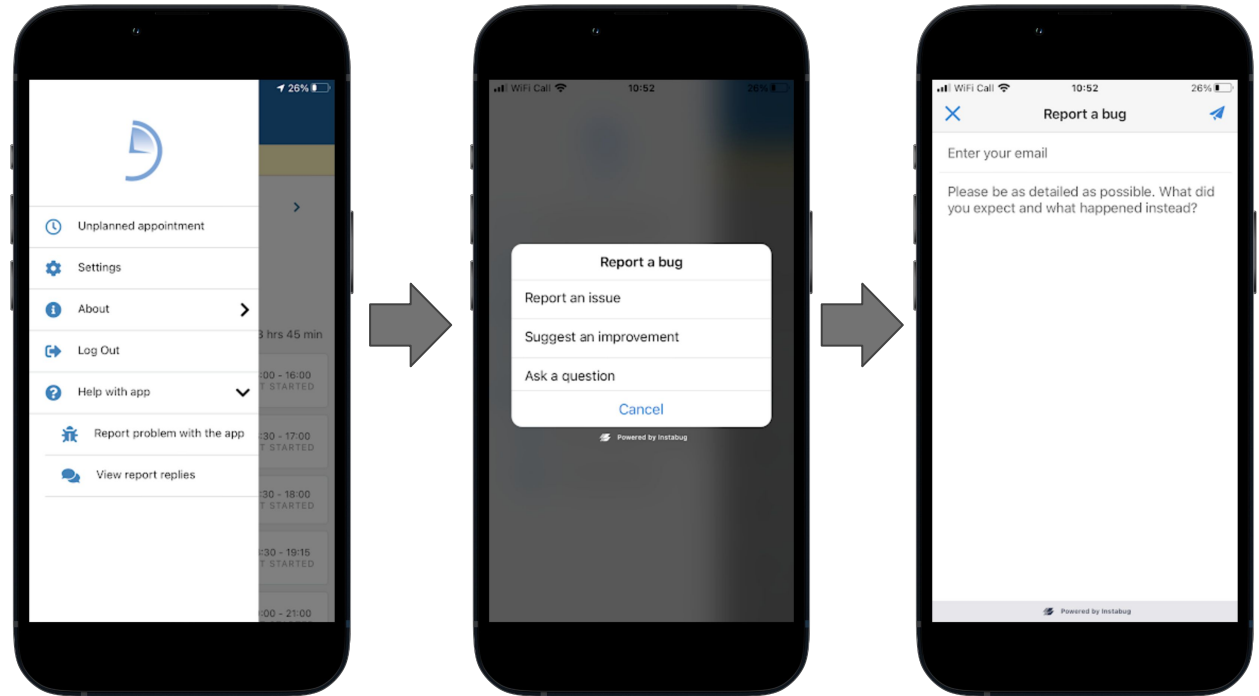


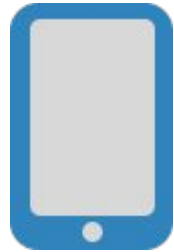


App Support

Notifications & Warnings

You can report an issue, suggest an improvement or ask a question about the CarePlanner mobile app by using the 'Help with app' option in the menu.





Stay up to date

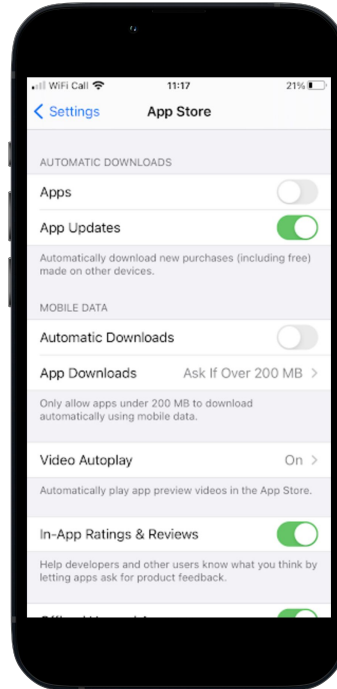
Stay up to date

CarePlanner will routinely make updates to the app to improve your experience as a carer.

Either turn on automatic updates on your device, or check your App Store regularly to ensure that you have the latest version!

iOS

Settings → *App Store* → *Automatic downloads*



Android

Google Play Store → *Settings* → *Network Preferences* → *Auto-update apps*

