End User Guide

clearcare

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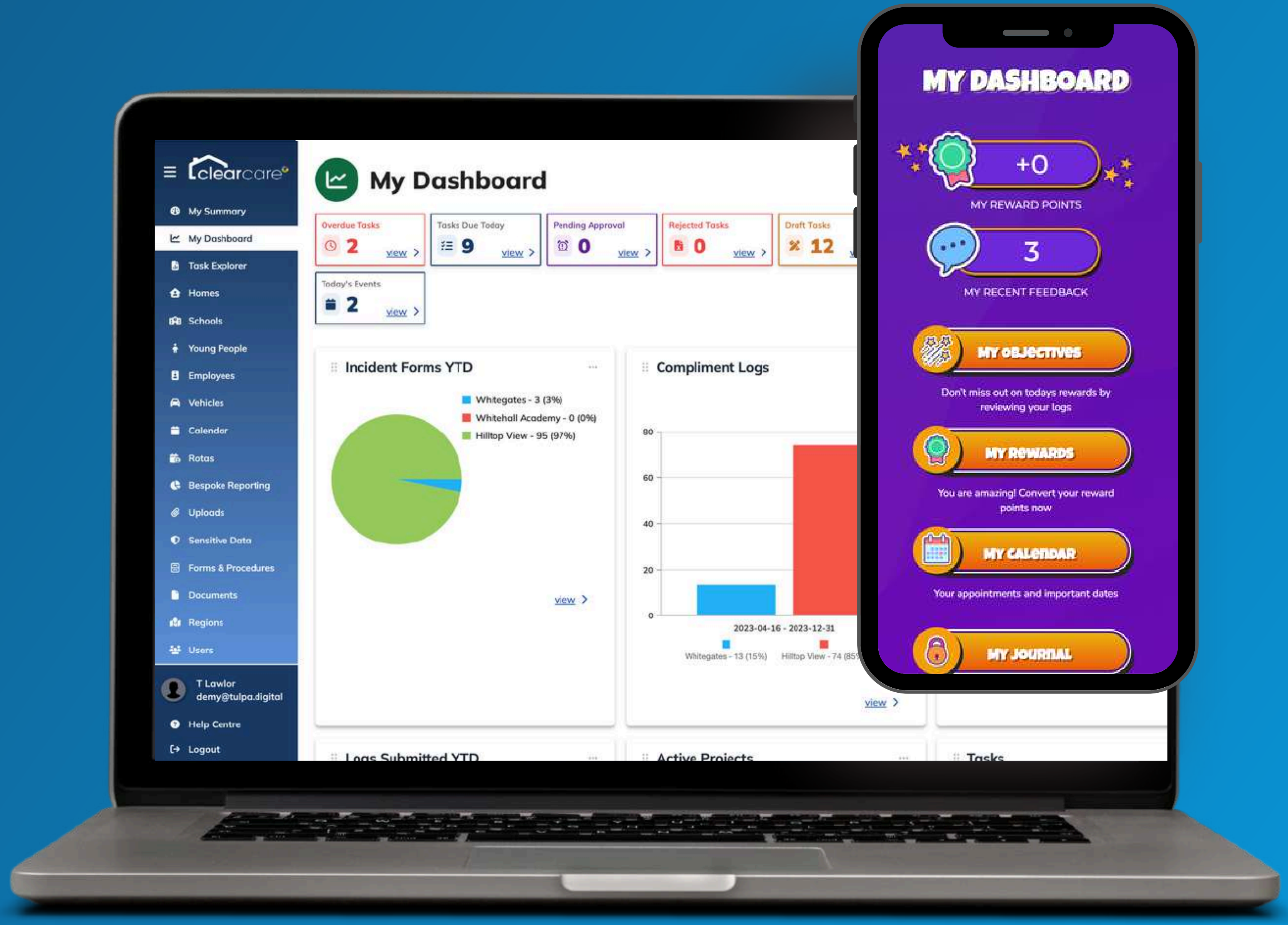
Introduction

This user training guide is for residential support workers, registered managers and senior management who need to record and report on information within ClearCare.

Clearcare is designed to integrate the reporting procedures and processes involved in the day-to-day running of a care facility, allowing all staff more time with children in their care.

This guide has been written to compliment your initial user training session. It may also be used for reference and to train additional users.



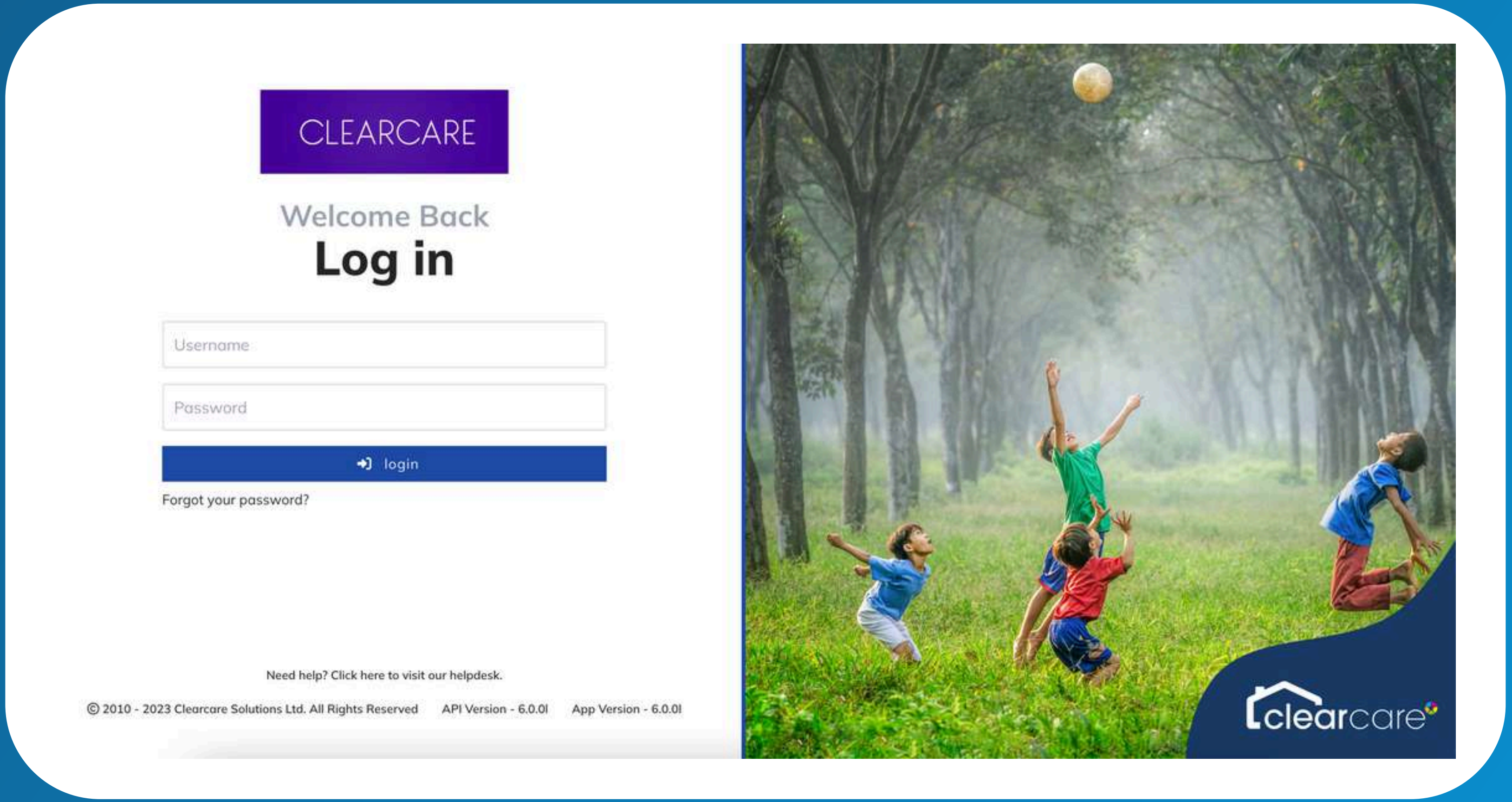
Still need support? Contact our team

Logging In

You can access the ClearCare application on any P.C, laptop or smart device that allows you to use a browser.

Begin by clicking the site link provided by your administrators. If you don't have this, type the appropriate site address into your web browser - for example: newcare.clearcare.co.uk

Once you have entered the address into the web browser, you will see a login page appear. Enter your Username and Password. Then click 'Login'. If this is your first login to ClearCare, you should be asked to change your password.



Please note:

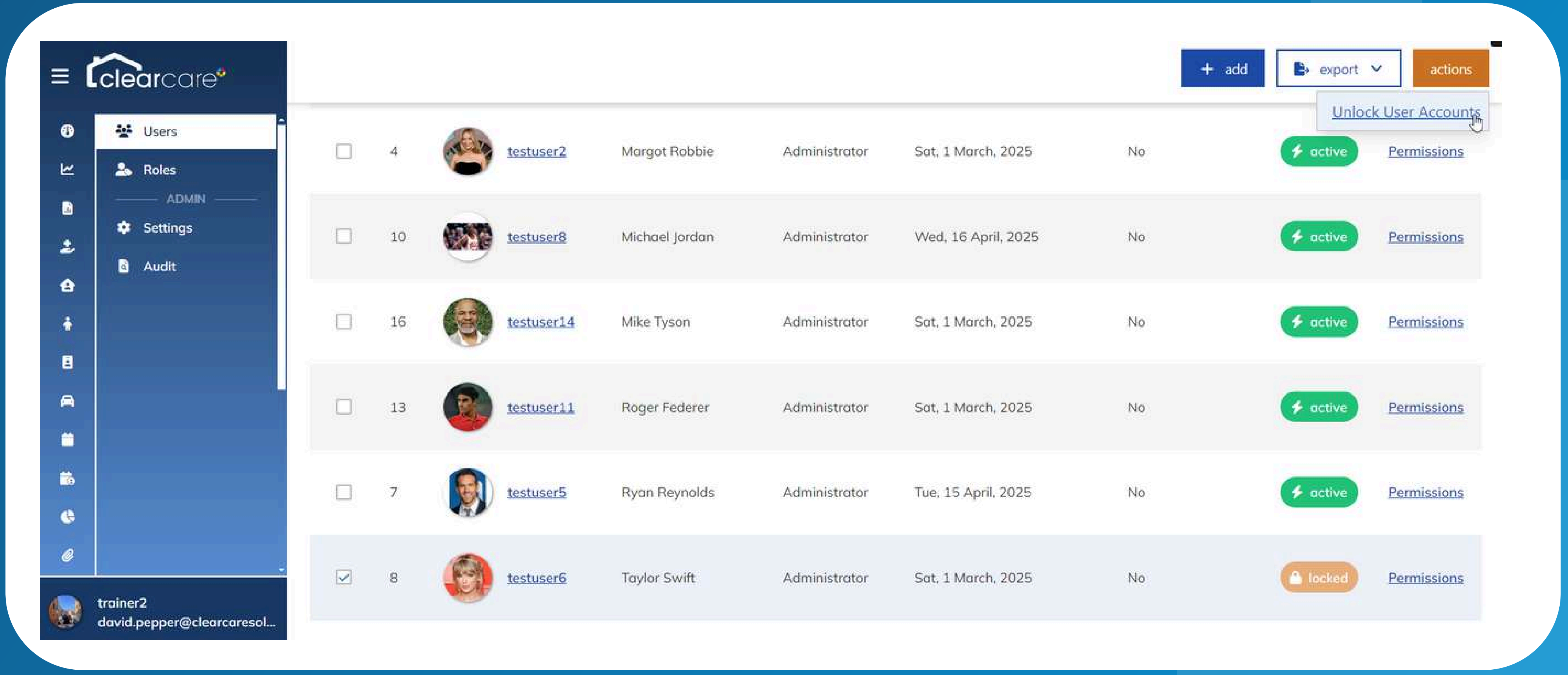
- Your password is case sensitive. Repeated failed logins will result in your account becoming locked.
- You must not share your Username or Password with others or allow the browser to remember your details.
- Should you forget your password, there is a password reset button on the main login page.
- Please always remember to log out of the application before leaving your device unattended. This prevents records being created or altered in error against your name.

How to Unlock a User Account

If a user repeatedly fails to enter the correct username or password, their Clearcare account will be locked. When this happens, only a manager or a user with administration permissions will be able to unlock the account.

To unlock an account, visit the Users module and find the locked account in the table of users. In the table's Status column, you will notice that the account in question has changed from green and marked as Active, to orange and marked as Locked.

Once the locked account has been selected, click the orange Actions button and select 'Unlock User Accounts'.

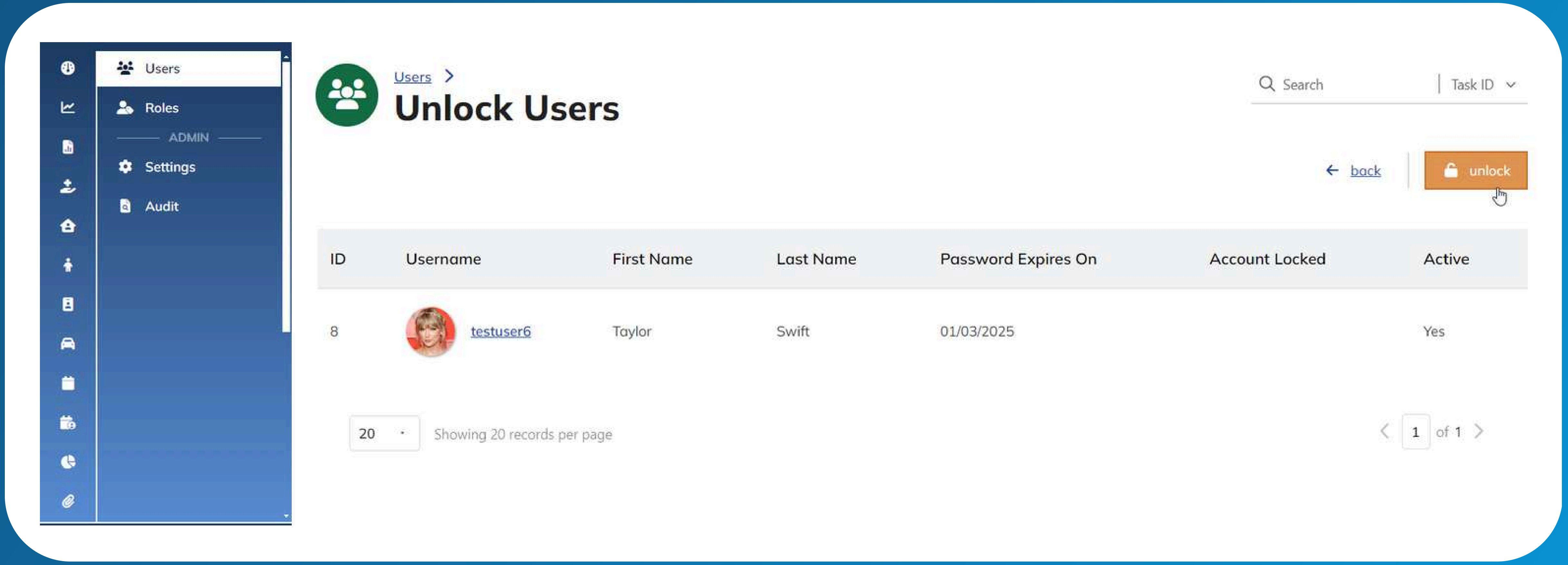


How to Unlock a User Account (cont.)

This will take you to a new temporary section where any selected accounts will be listed for you to check. When you're satisfied, click the orange button marked Unlock to confirm. You will then be taken back to the main Users module.

Scroll down the list of user accounts and you will see that the account you just unlocked is once again marked as Active. The user should now be able to access their account.

N.B - It is good security practice to discuss with the user how their account became locked, to ensure it doesn't happen in the future. Records of all failed logins can be found in the Audit section of the Users module, for those with permission.



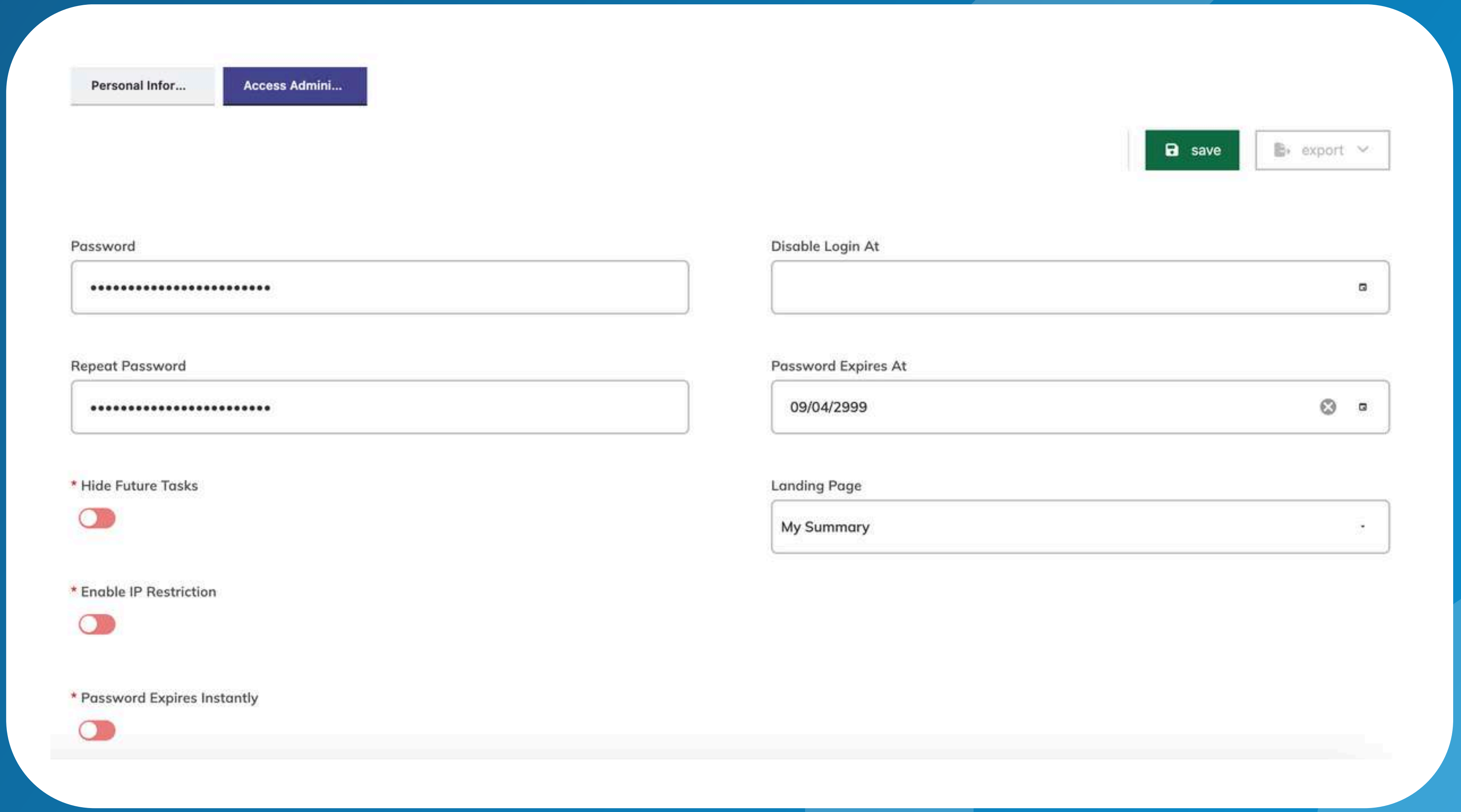
How to Change a User Password/Set a Temporary Password

To change your password, or to set a temporary password for another user, visit the Users module.

Click on the user whose password you want to change. This will take you to the user's filing cabinet. From the grey tabs at the top of the user's screen, click the one titled Access Administration. Here, you will be able to see the user's password and related settings.

Choose a simple password that meets all the password requirements, and enter it into the Password and Repeat Password fields.

You can also set a temporary password here, either by clicking the Password Expires Instantly toggle, or setting a specific date for when the password will expire. This is useful for giving temporary access to certain parties, such as Ofsted inspectors.

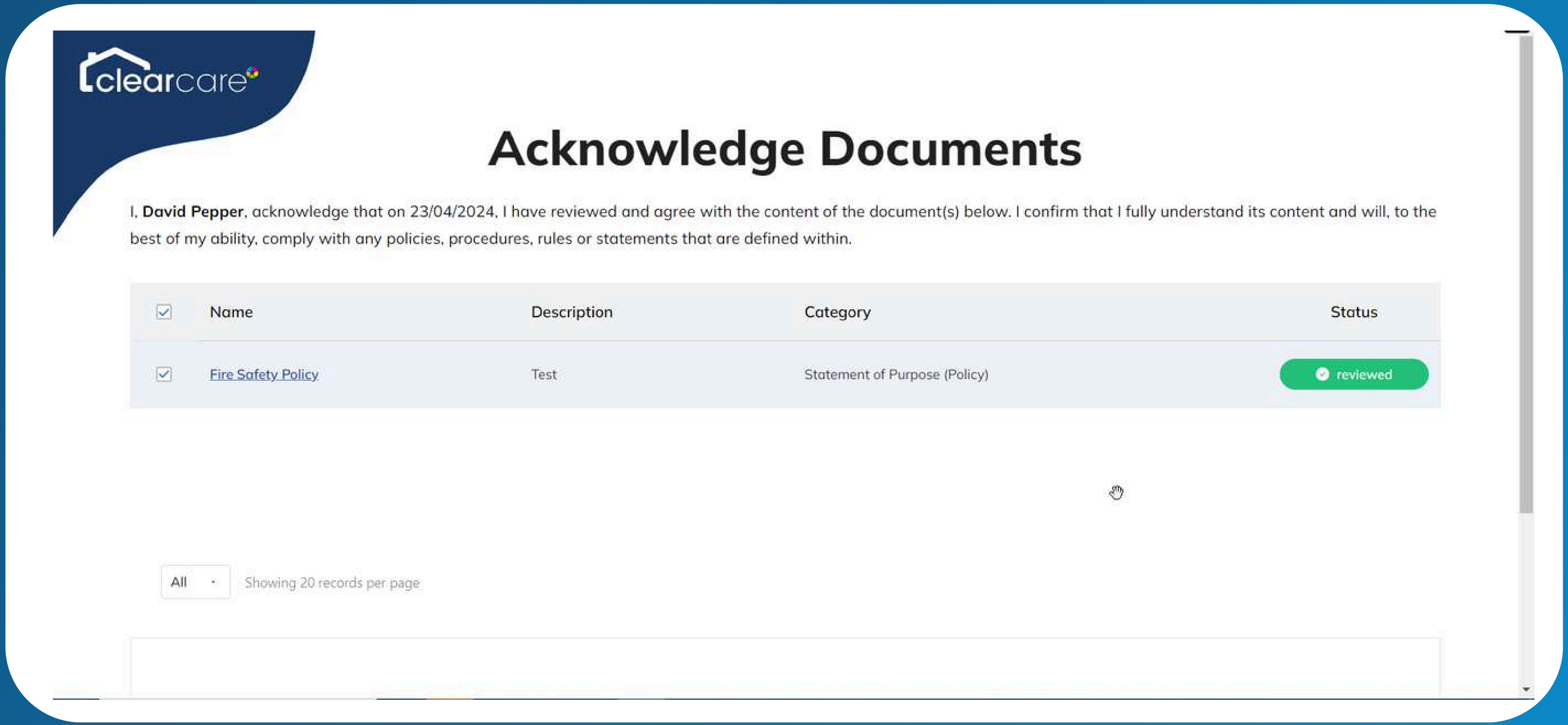


A user can also change their own password at anytime by visiting the Manage Profile section. This is accessed by clicking on your Username in the bottom left of your screen.

Acknowledging Policies & Documents

Upon logging in, you may be asked to acknowledge that you have read company policies or documents within your Clearcare site. If this is the case you will be prompted to view and acknowledge these documents.

Click on the document name to view the document and use the tick box and, where appropriate, the signature box followed by the Submit button to acknowledge it.

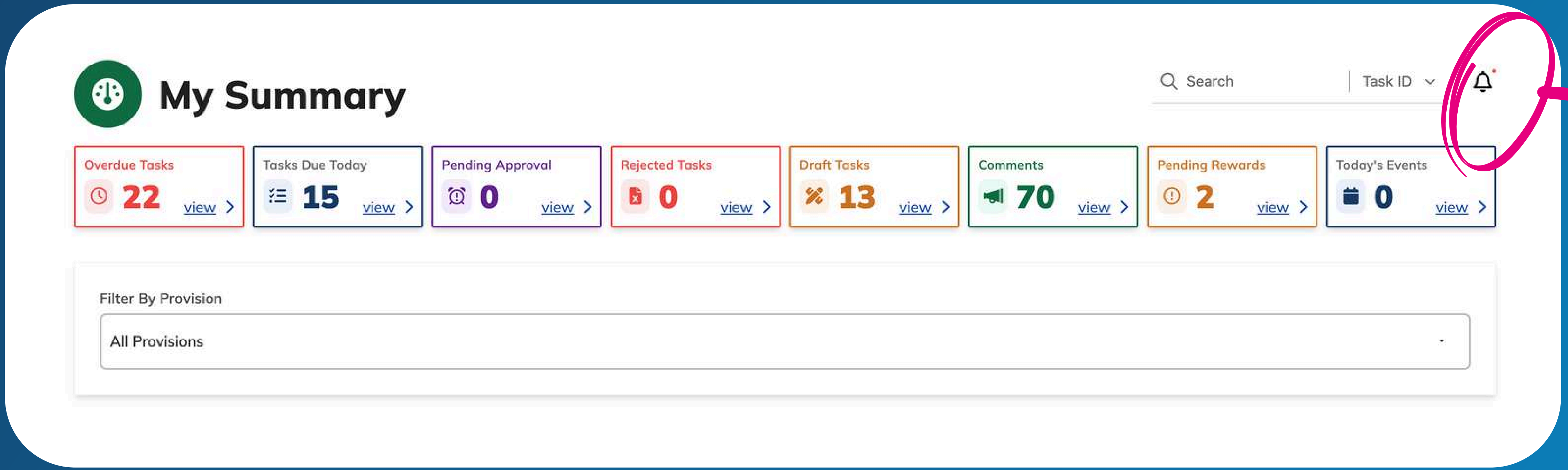


Navigating the Site

Search Box and Notifications

As you navigate through Clearcare, you will notice the ever-present search box and notification icon in the top-right corner of your screen. The search box helps to make finding today's tasks easier, with the ability to jump to the task or log you require from anywhere within Clearcare. By clicking the drop-down arrow next to the search bar, you can choose whether to search via unique Task ID or Log ID.

The notification bell tells you when actions have been completed on projects within your remit. The red dot indicates you have new notifications. Click the icon to see all pending notifications.

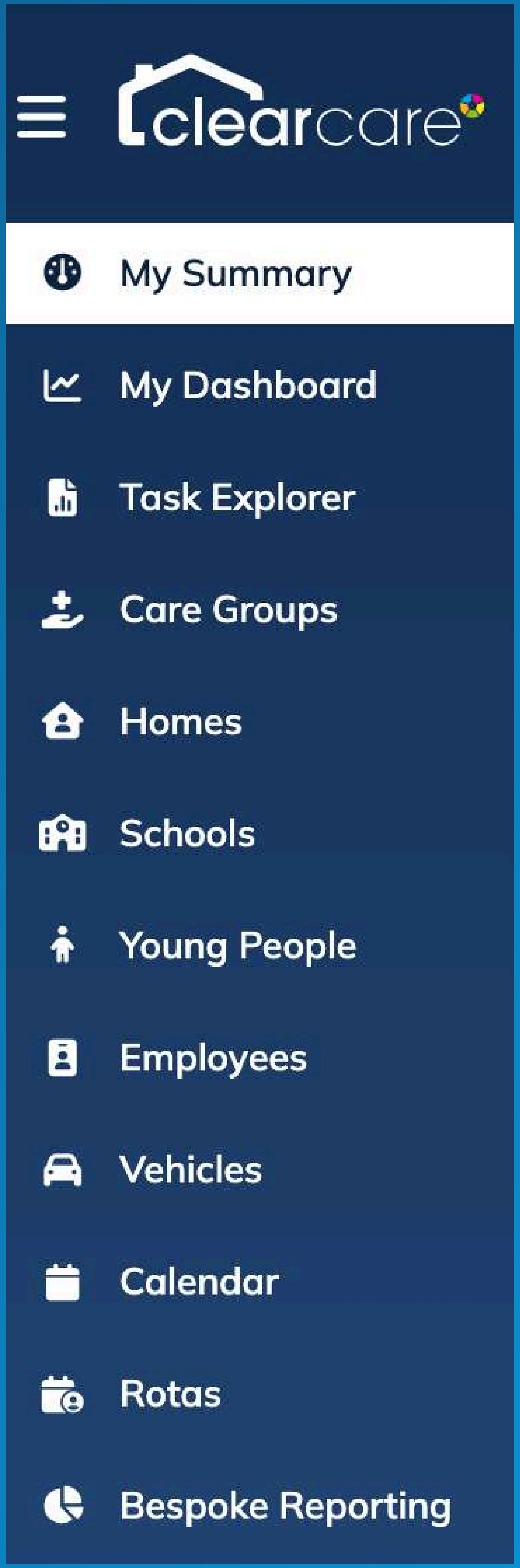


Modules

After successfully logging in to the site, you will also see a blue side menu on the left that contains all of the modules available to you.

To navigate to the parts of the site you have access to, simply click the appropriate module in the side menu.

If you are working from a tablet or small screen, the module links may not be immediately visible to you. Selecting the hamburger menu at the top right of your screen will open your Modules menu.



Introduction to Filing Cabinets

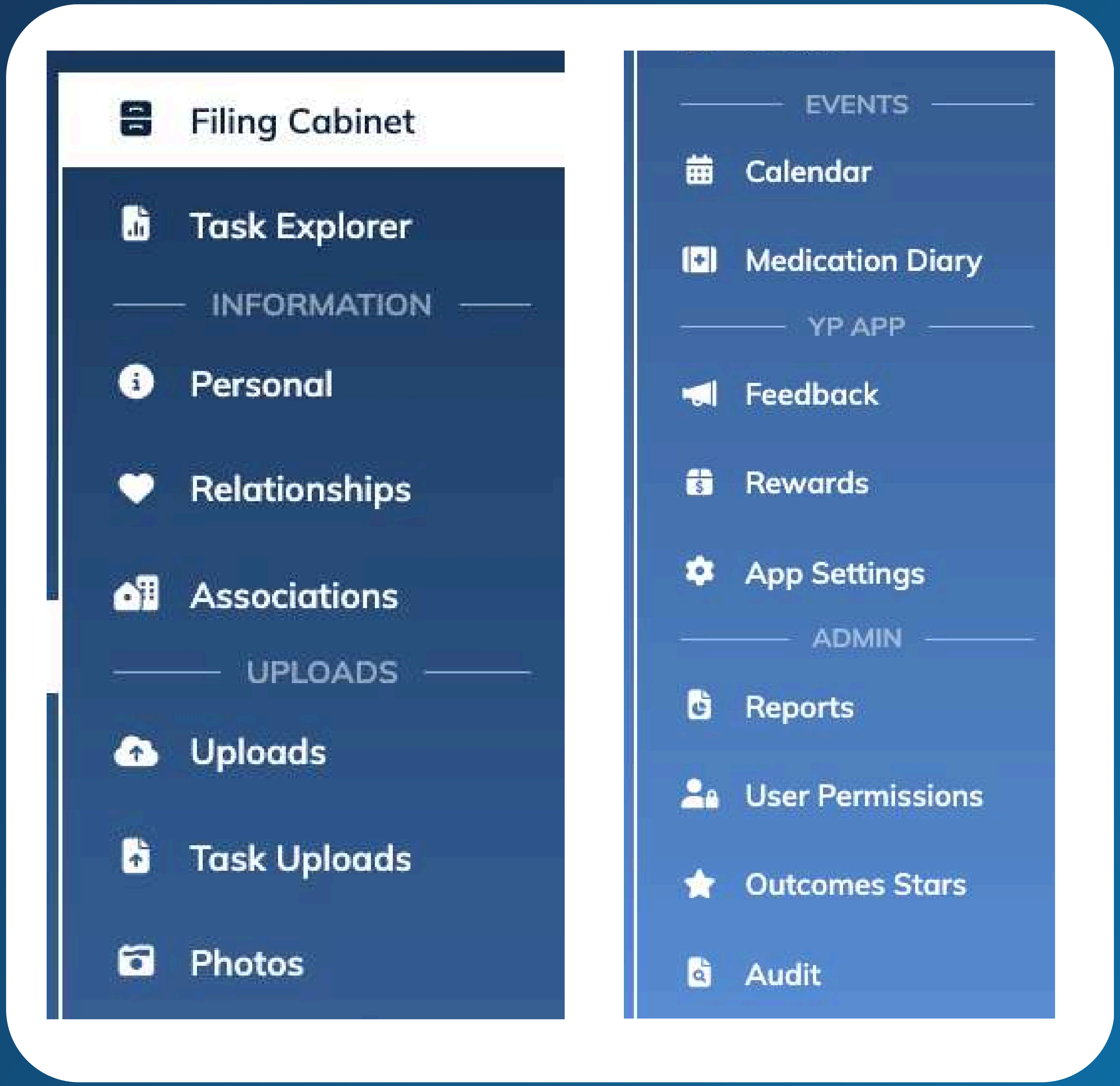
Filing cabinets can be found in almost every module, and are a convenient place to find submitted logs or drafts relating to that module and its contents. When logs have been submitted into the site, or saved as a draft, they are stored in a filing cabinet.

The Homes, Young People, Schools, Employees, Vehicles and Care Groups modules all each have their own filing cabinet containing all submitted logs and drafts. In addition to this, there is a filing cabinet in the Sensitive Data module that contains any uploads marked as 'sensitive' for all projects.

To access a young person's filing cabinet for example, visit the Young People module and click on the young person's name.

Filing cabinets have grey filter buttons at the top, to help you easily find specific submitted logs, forms and drafts for that project, starting with the most recent at the top.

The filing cabinets within any module automatically open with the All button pre-selected.



Introduction to Filing Cabinets (cont.)

Filing cabinets also have their own sub-menus, with headings that allow for easier navigation.

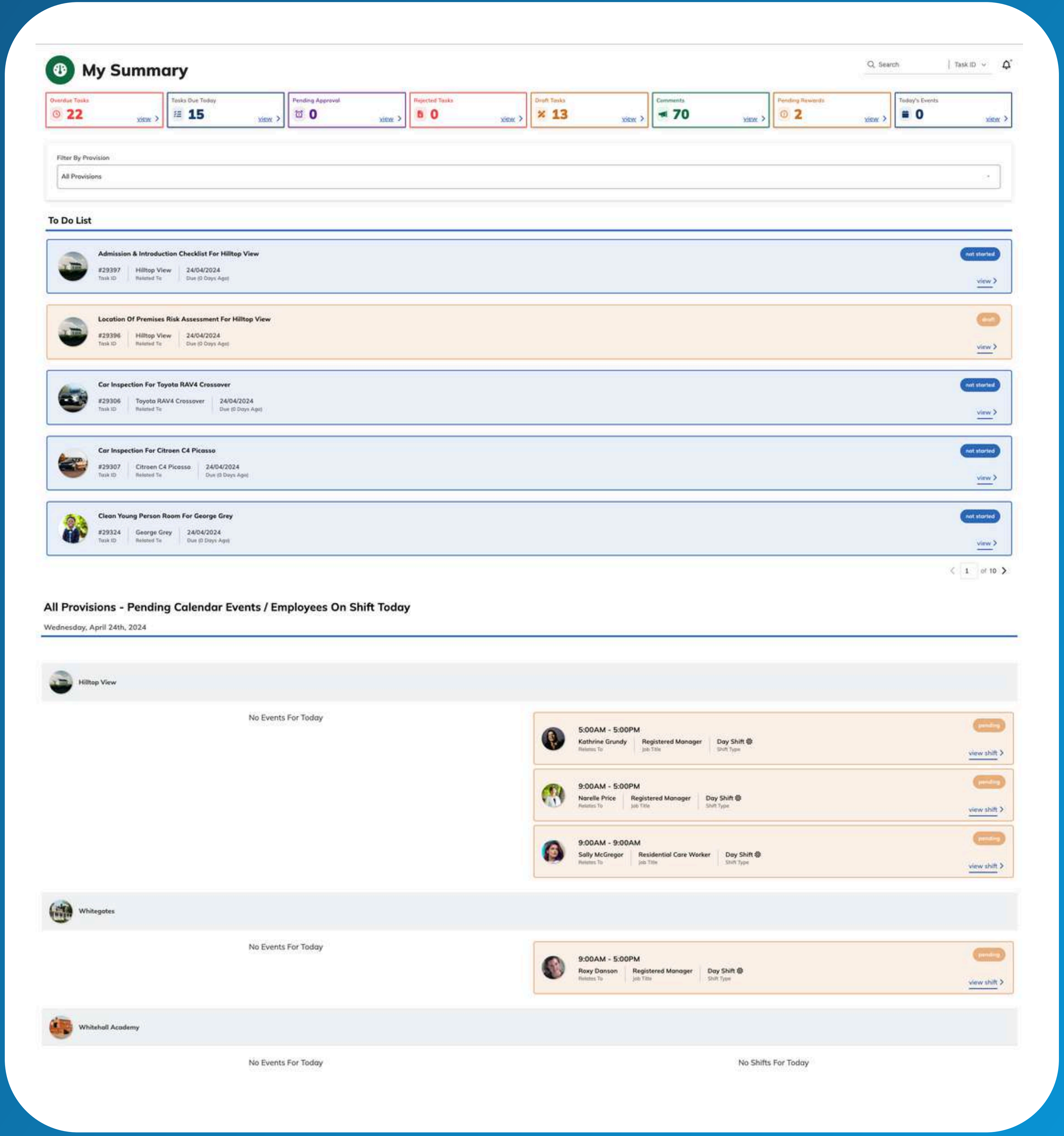
For example, in the Young People module, the filing cabinet headings let you find and edit personal information, change associations and permissions, review feedback, look at their calendar, and view, generate and export specific reports.

My Summary Module

After successfully logging in to the site, the next page you will see will be the summary screen.

From this screen, you can access any parts of the site available to you.

Your summary screen breaks down into the following key components:



Data Cards

Data cards are displayed at the top of your summary and give you an overview of your tasks for the day. Think of them like newspaper headlines - they clearly and concisely explain what's currently happening in your care setting, and establish a context that can be understood immediately.

Your data cards tell you whether you have tasks due, overdue, pending approval, unfinished etc. Click any of these data cards to see the list of tasks it relates to.

Your Data Cards Explained

Overdue Tasks

This data card alerts you to the number of tasks that have passed their scheduled date and become 'overdue'.

The number of overdue tasks in your list is displayed on this data card. Click on it to see and action all overdue tasks.

Tasks Due Today

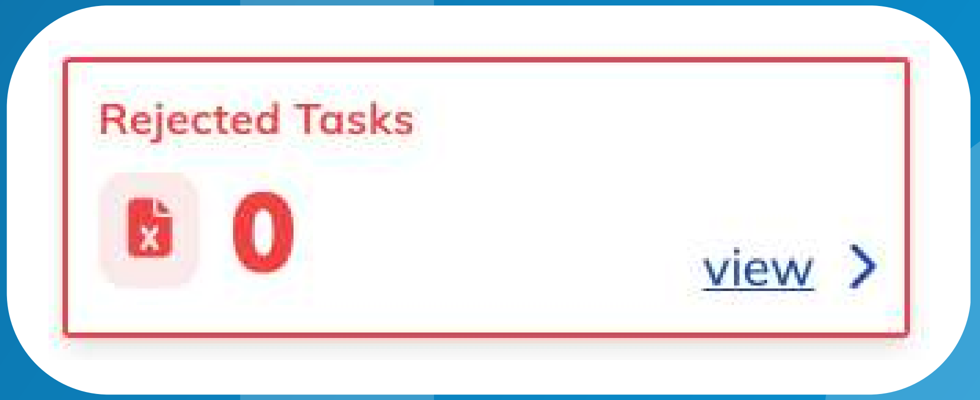
This data card shows which scheduled tasks are to be completed today, in order to meet organisational requirements.

The number of tasks in your list will also be displayed here. Click the data card to view and action the full list of today's tasks.

Rejected Tasks

If a task has been submitted for approval and the approver has rejected it, it will appear on this data card. Click on it to view a list of all rejected tasks and - where appropriate - action them accordingly.

Clicking any of the tasks in the list will open it to be completed. Rejected tasks will have provision for a "manager comment" to give the user guidance before resubmitting.



Please Note - The content of rejected tasks will not be taken into account when running reports, which may affect their outcome.

Future Tasks

This data card links to a list of tasks due to be completed over the next 3 days. These tasks can be completed in advance, if a meeting has been brought forward, for example. You can also use your list of future tasks to effectively plan your workload in advance, saving you time.

As a manager or administrator, you may choose to hide this list from your users' screens.

Comments

This data card alerts you when a young resident in your care has submitted a comment, a question or another form of feedback. Click on the data card to view the full list of young people's comments.

The list is organised by which young resident the comment relates to. Clicking on a comment will allow you to submit one in response and post an emoji reaction if desired. You may also toggle whether you want the young person to see your response.

Pending Approval

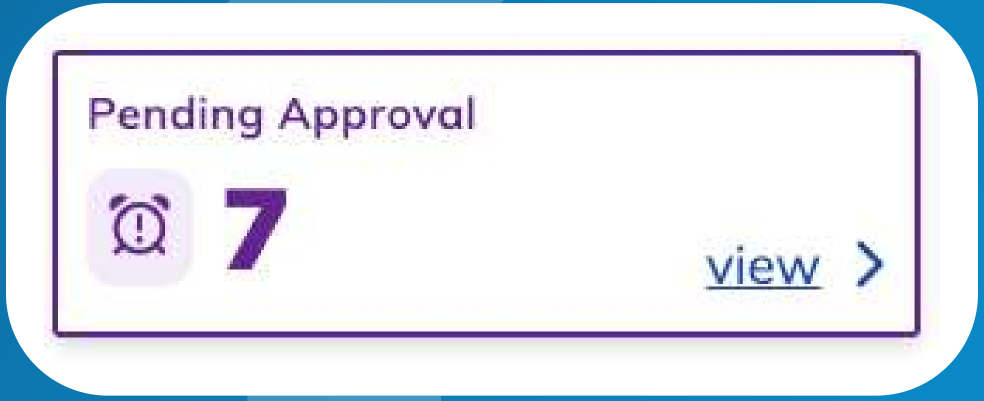
This data card shows a list of tasks waiting for approval. Some tasks may have "Named Approvers" on them. This means that, when submitted, another staff member will view the task and decide whether to approve or reject it.

When you click this data card, you will see a list of logs sent to your approvals queue i.e. logs that are waiting for you to approve them. Logs in this list will show an "awaiting approval" status. The grey filter buttons at the top of your screen allow you to switch between categories of pending approvals.

It's worth noting that the content of tasks pending approval will not be taken into account when running reports. This may affect the outcome of any related reports.

Once approved, these tasks will go into the appropriate filing cabinet.

[Learn more about the approval process here](#)

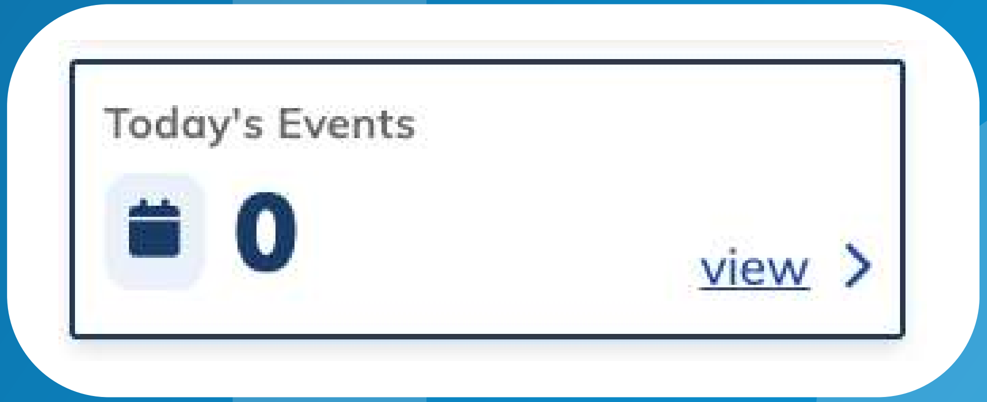


Draft Tasks

This is a list of incomplete tasks that have been saved as draft rather than being submitted. Clicking this data card will allow you to view all tasks currently saved as a draft. Tasks will appear in this menu if you have selected Save as Draft on the task, or the system has timed you out while the task is open.

Today's Events

This data card alerts you to upcoming events for the day, allowing you to plan your time effectively. Items appearing here have been scheduled on the Calendar or young persons' Medication Diary, and can include doctor appointments, family contact, medication to administer etc.



Selecting an entry will open the calendar module with all of your daily events listed. There are also filters that let you find events by status, as well as associated homes, employees, young people and more.

Click on an event to view it in more detail. You may then add notes and set the event as In Progress, Expired, Pending or Completed. For recurring events, you have the option to stop them from recurring in the future.

Filter by Provision

Your day-to-day duties may include multiple homes or schools, but sometimes you want to just focus on one specifically. In this case, Clearcare allows you to filter your summary to only show data from a provision of your choosing. Clicking the dropdown arrow gives you a clearly-labelled list of all homes and schools that you have permission to see. You can choose any specific provision here, or choose All Provisions to see all your data together.

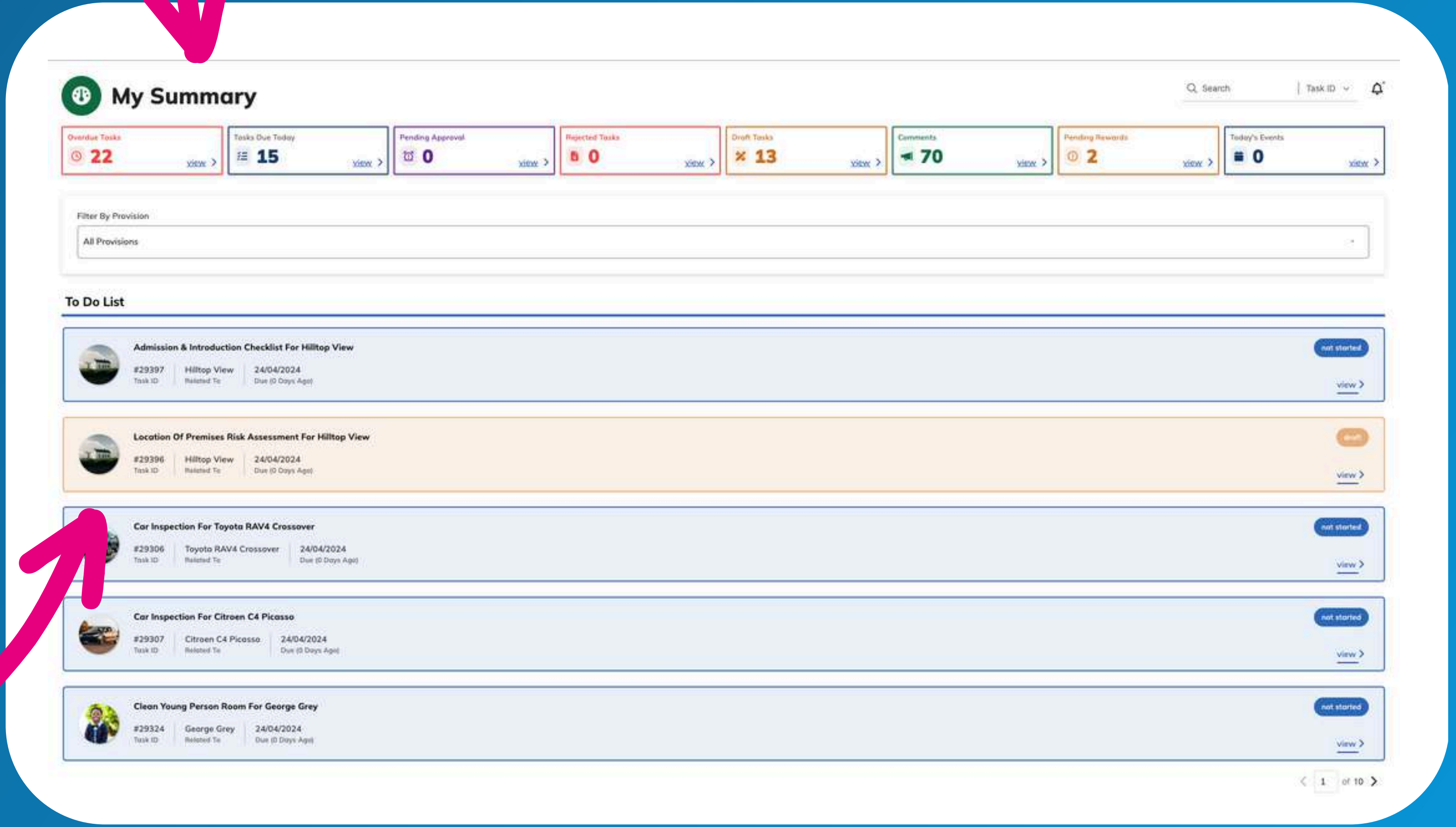
To - Do List

This is a list of all your scheduled task forms that are awaiting completion by staff and managers.

Each list item is labelled with its current status and colour-coded to reflect urgency, with overdue tasks displayed in red. Clicking any task will open it to be completed.

Tasks in your to do list are generated in one of two ways:

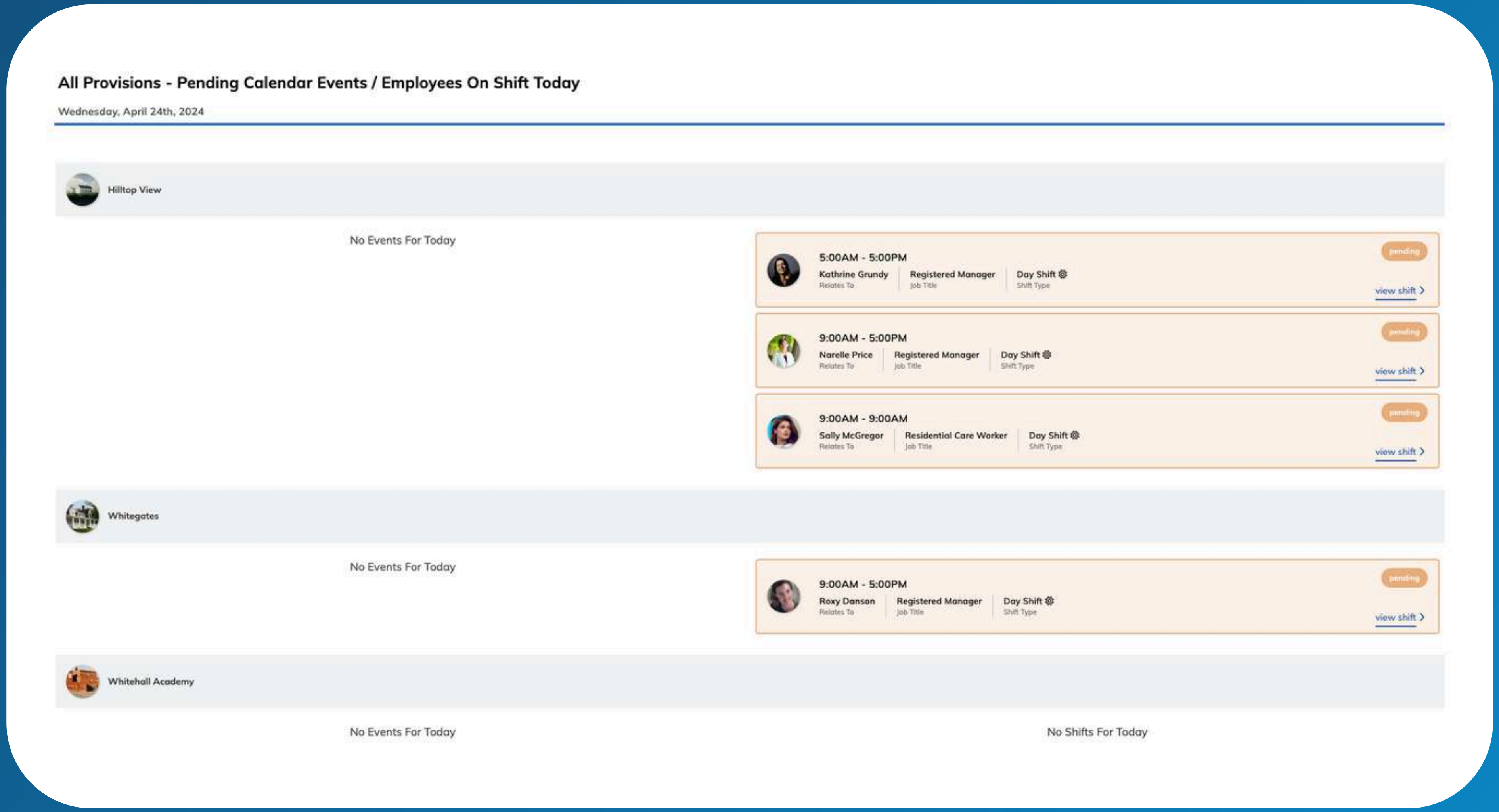
Firstly, your admins have set up procedures that ensure any tasks requiring your attention automatically appear in your summary. Secondly, completing a task form will often trigger follow-up tasks that will also appear in your summary to be actioned.



Pending Calendar Events/Employees on Shift Today

This section gives you an overview of what events are scheduled today, and the personnel you have with you. This provides an immediate impression of how busy your day is likely to be, and gives you the chance to plan accordingly. Events and shifts in this section are added via the Calendar module.

Marking an event as complete will remove it from the Pending Calendar Events section on the main summary page. However the event will still be still be accessible through the Today's Events data card and will show as green on the main calendar.



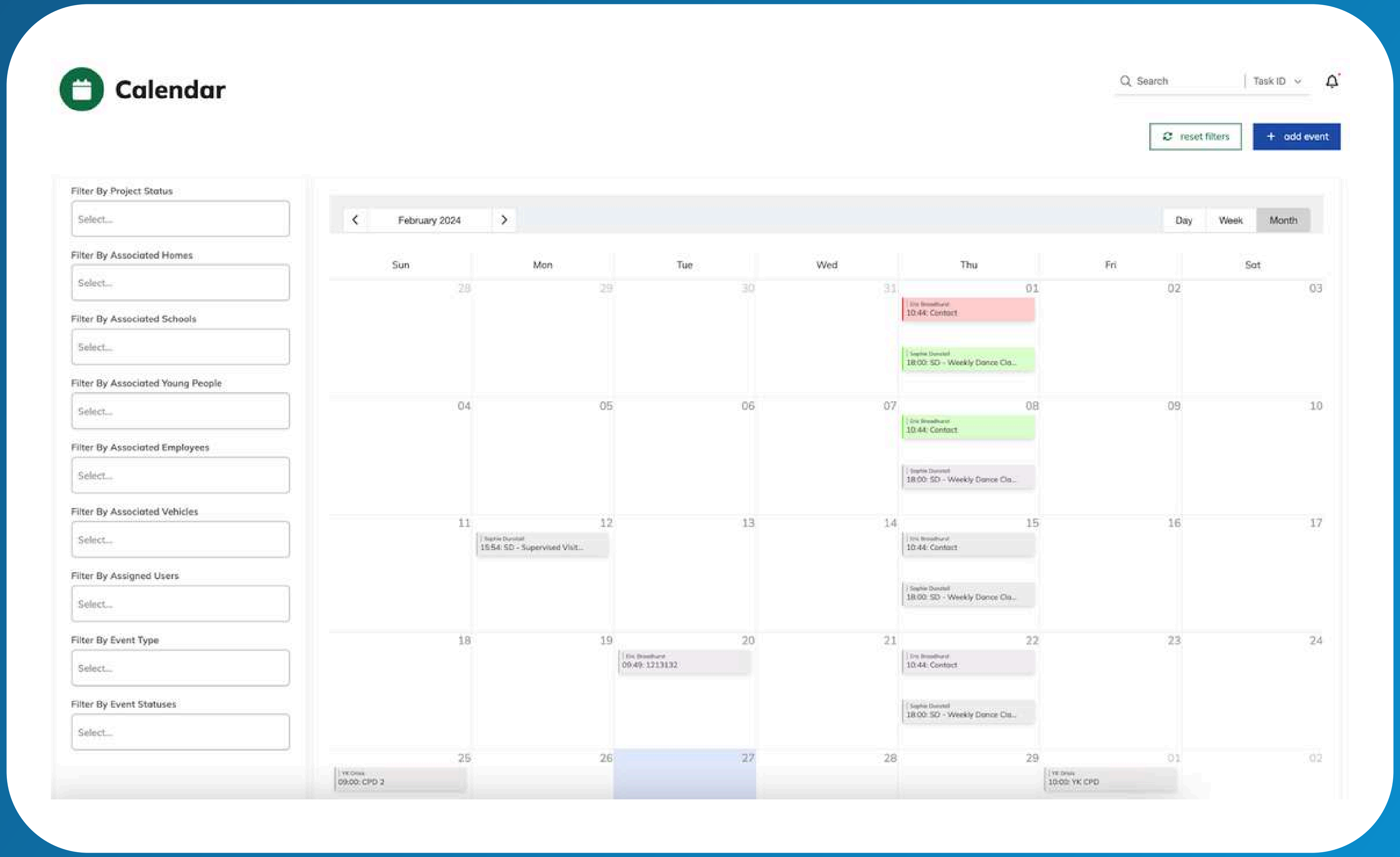
The Calendar Module

The Calendar module lets you record and see appointments that relate to Residents, Homes, Schools, Employees and Vehicles.

The module opens in the monthly view and shows appointments for the current month for all entries the user has permission to see.

On the left of the page, there is a list of various filters you can use to search for the calendar events you require.

Users can set the event as In Progress, Expired, Pending or Completed and notes can be added to the event.



Adding a New Calendar Event

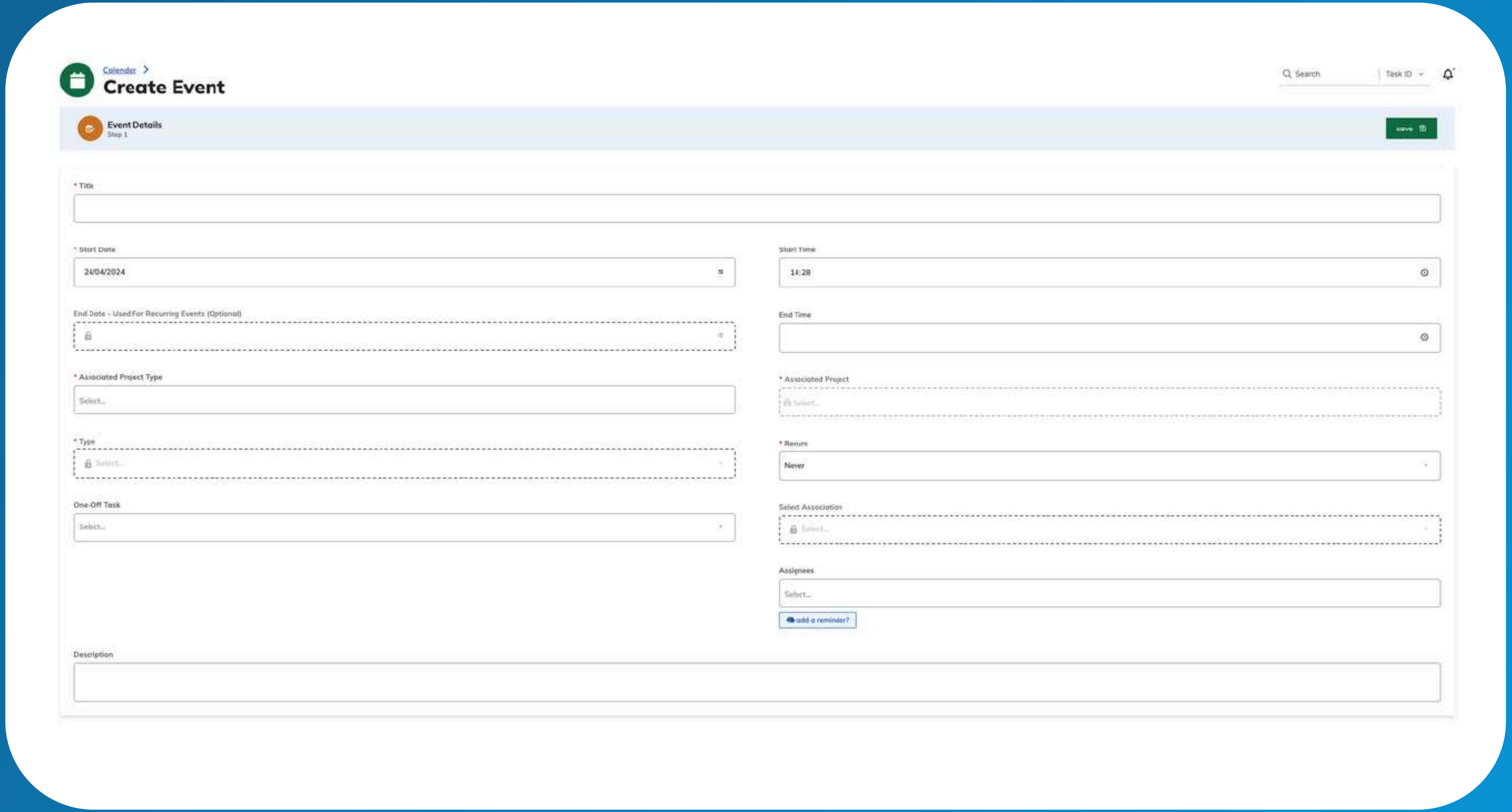
From the Calendar module, clicking Add New Event will open a window where the details of your event can be added. The first entry is the Title. This will appear on the calendar itself and so needs to be explanatory.

The Associated Project Type/Associated Project field allows you to set who or what the entry relates to. This makes the entry permission sensitive. All residents, employees, homes, schools and vehicles you have permission to see will be listed.

You can choose how often this event should recur and, if necessary, assign a one-off task, relating to this event, for the assignee to complete.

For example, you may want to generate a Health Appointment task for an event relating to a doctor's appointment.

Lastly, you can add any further information or a Description to your event. Clicking Submit will save your calendar entry. It will now be visible on the calendar and, when the event is due, you will also see it in your summary screen.

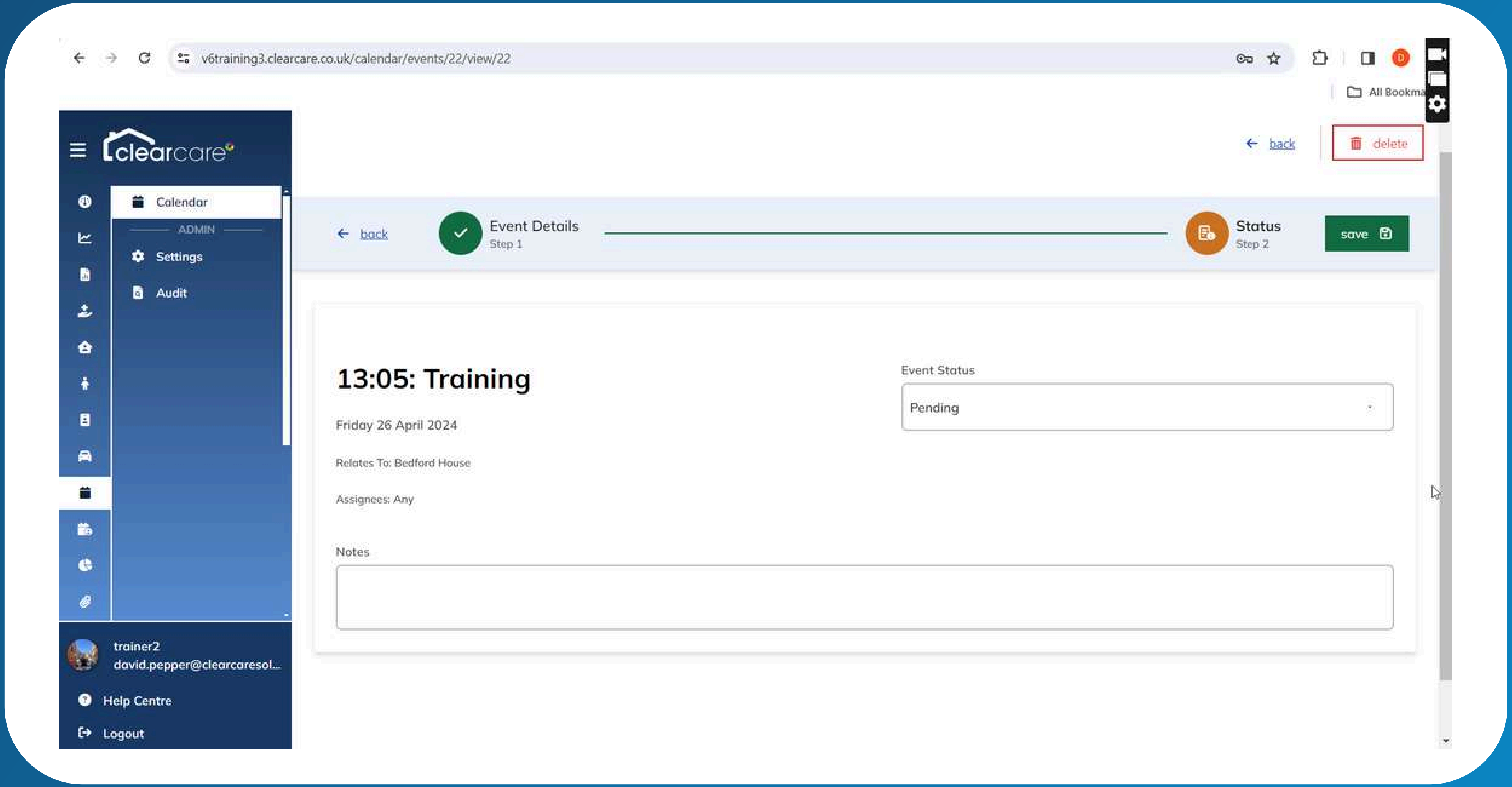


Editing an Existing Event

Clicking on any scheduled event on the calendar will open a view that allows you to edit its details.

Depending on the event type, there may be different or additional options that you can edit. For example, if the event type is set to Training, there are additional details about the venue, meeting and instructor (see image).

When you have finished editing the event, click the green Save button.

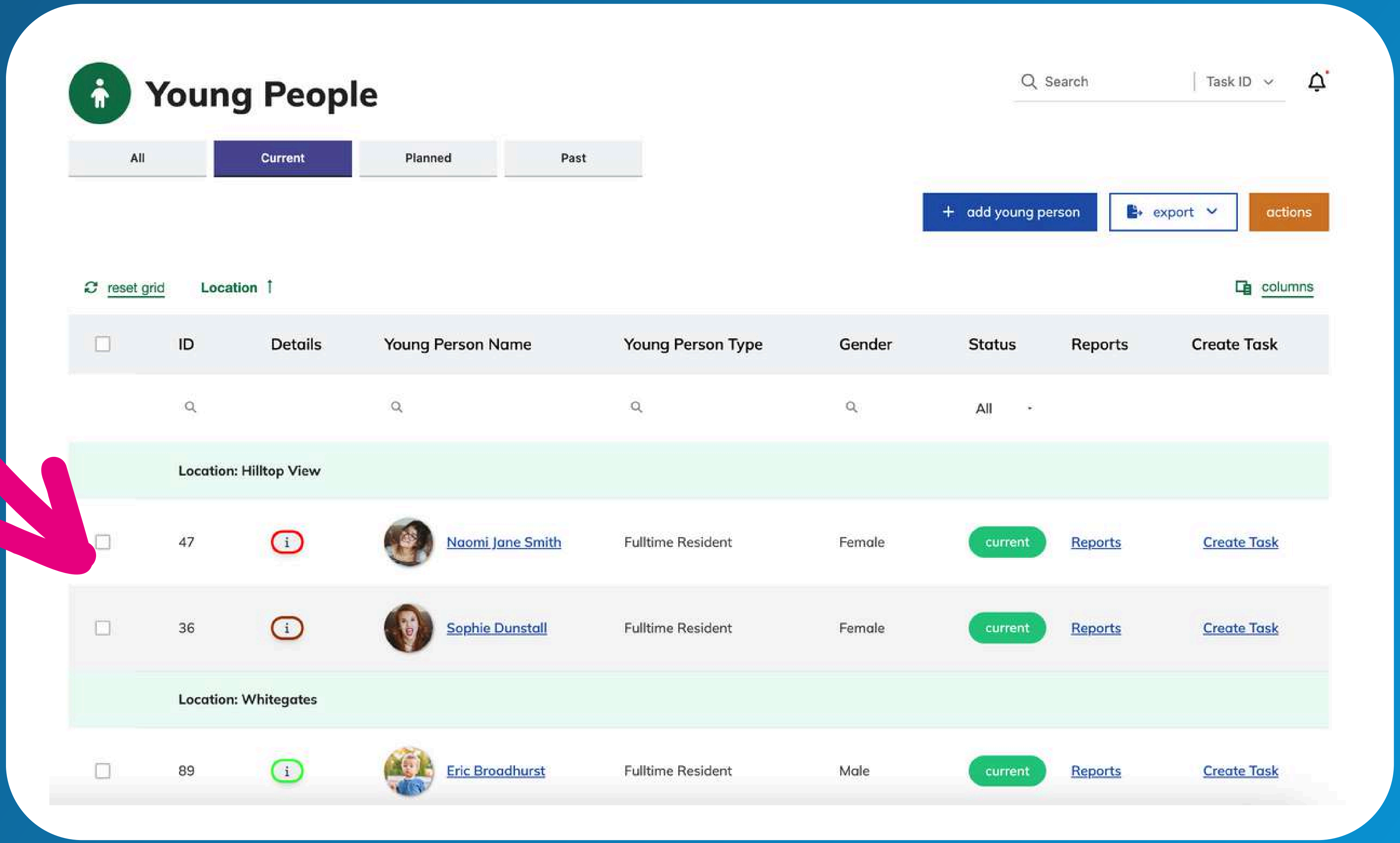


The Young People Module

Selecting the Young People module will take you to the following screen where you will see the list of residents you have permission to view. You can filter the list by Current, Past, Planned or All residents by using the grey filter buttons shown in the image.

From here, you can click the information icon for a 'quick look' view of a young resident's profile details. Clearcare will export a PDF summary containing all the high-level information you need for the young person.

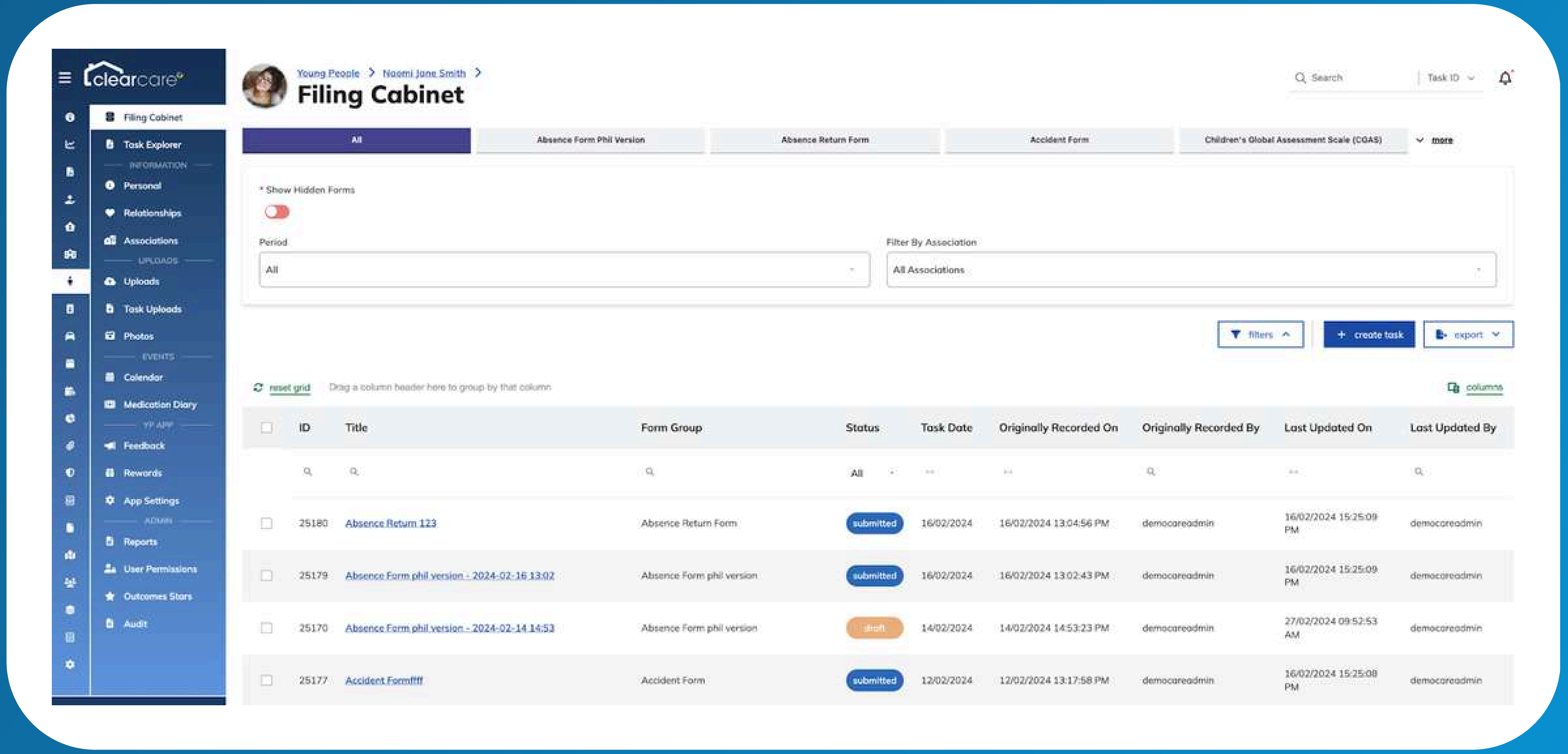
Depending on the permissions you have, you may also see shortcuts that let you run reports on a specific young person or create a new task relating to them.



Young Person’s Filing Cabinet

By clicking the name of a resident, or any other project in the site, you will be taken to the filing cabinet for that particular resident or project.

The filing cabinet menu allows you to jump quickly between sections of the young person’s profile. With the right permissions you can view and edit almost every aspect of the young person’s data, from personal information to reports, from uploads to feedback from the Kids App.



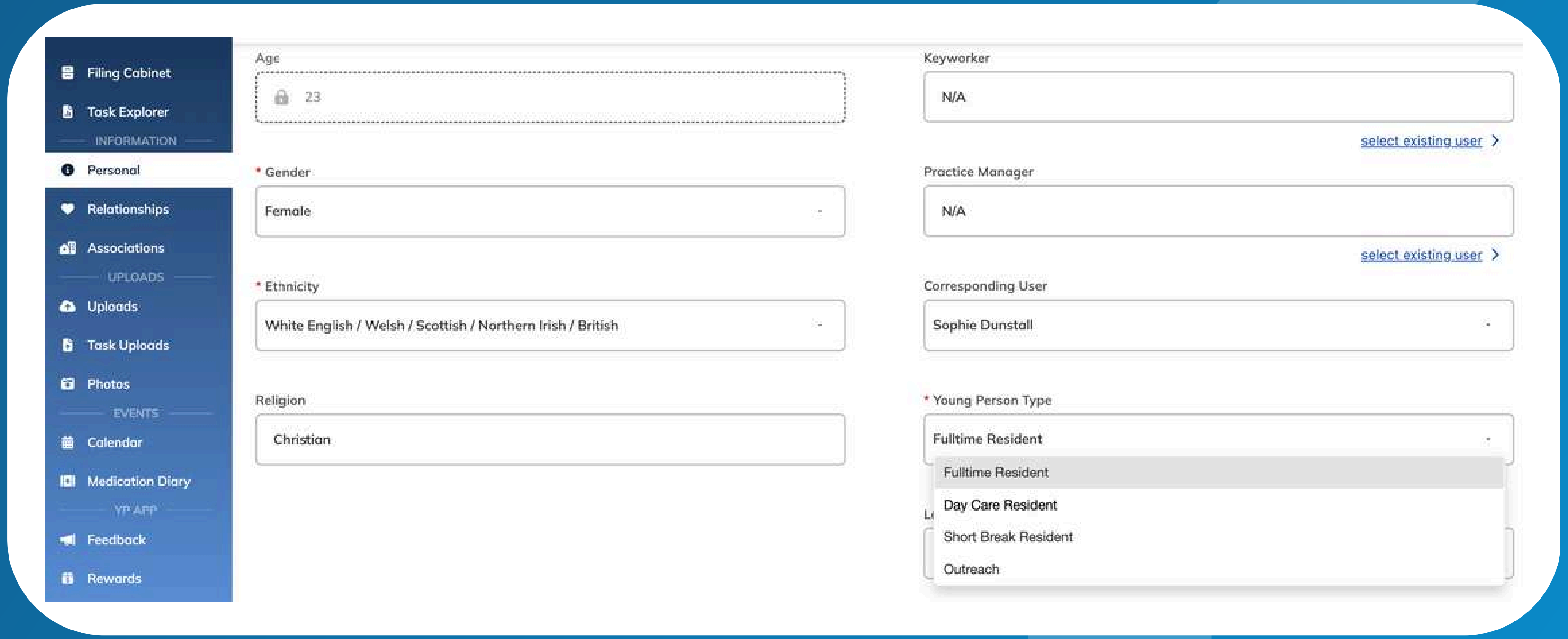
Again, you will see a variety of filter buttons at the top, with All selected. Clicking any of the other task/form group buttons will filter the results to show logs for that task or ‘form group’ only. For example, clicking the Absence Form button will filter the logs to only show logs using the absence form.

The logs from retired or “Hidden” forms can be seen by clicking the Show Hidden Forms toggle switch, so that it turns green. You can also filter the data by time periods and associated care settings.

Short Break & Day Care Residents

If a young person is a Short Break or Day Care resident, you will see an extra search field in the filing cabinet, which allows you to further filter your search by the resident's start date.

To identify a young person as a Short Break or Day Care resident, click Personal in the side menu of the filing cabinet. In this section, find the field marked Young Person Type and use the dropdown menu to choose whether they are a Full-Time, Short Break or Day Care resident.



Adding to a Young Person's Photo Roll

By selecting Photos in the resident's filing cabinet, you can view and upload photos that relate to the young person. The grey filter buttons at the top of your screen allow you to switch between Young Person Photos, Task Photos or All.

Click Add+ to add a new photo.

Follow the steps on the screen to select an image from your device, choose a category and then click Submit. Your newly added image will then display. You can repeat this process to add as many photos as you like.

Uploading Files and Historical Information

To view, add, edit or delete any uploaded files for a project, you must first begin by going to the filing cabinet for that project. For example; to view, add, edit or delete a file for a young person, you would begin by going to the filing cabinet of that young person.

Selecting the Uploads section in the filing cabinet sub menu will show you a list of uploaded files for that specific project. Files specifically attached to tasks relating to that project are housed separately in the Task Uploads section.

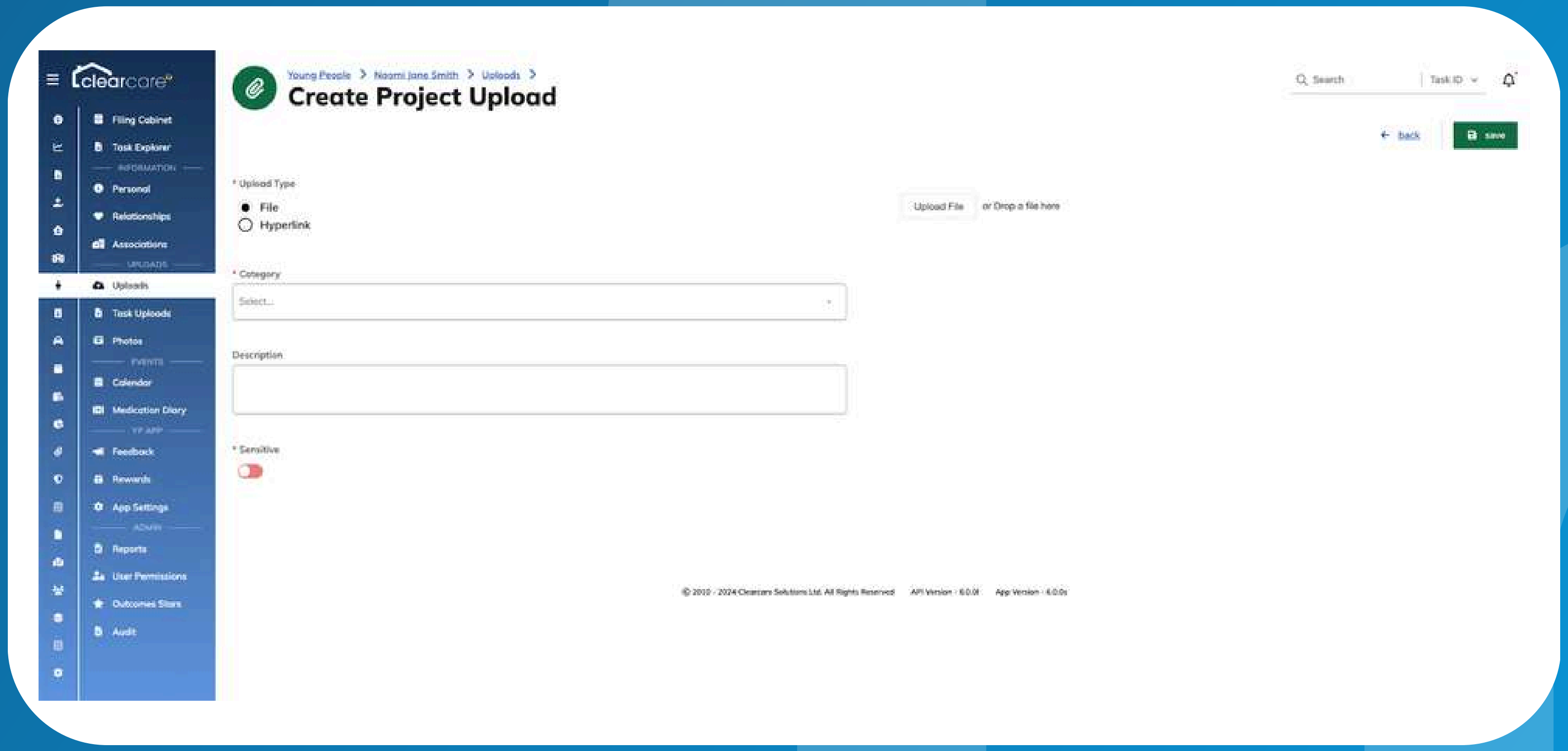
New files can be uploaded by clicking the blue Add+ button in the Uploads section.

The Create Project Upload window will now open.

Here you can select the type of upload, category and add a description for your file. You can then upload your file using the Save button. This file can also be marked as “sensitive” if required.

Files should be 20MB or smaller and PDF or JPEG format is recommended.

Uploaded files can be viewed, edited or deleted by users with adequate permissions by clicking on the file name.



Adding New File Categories

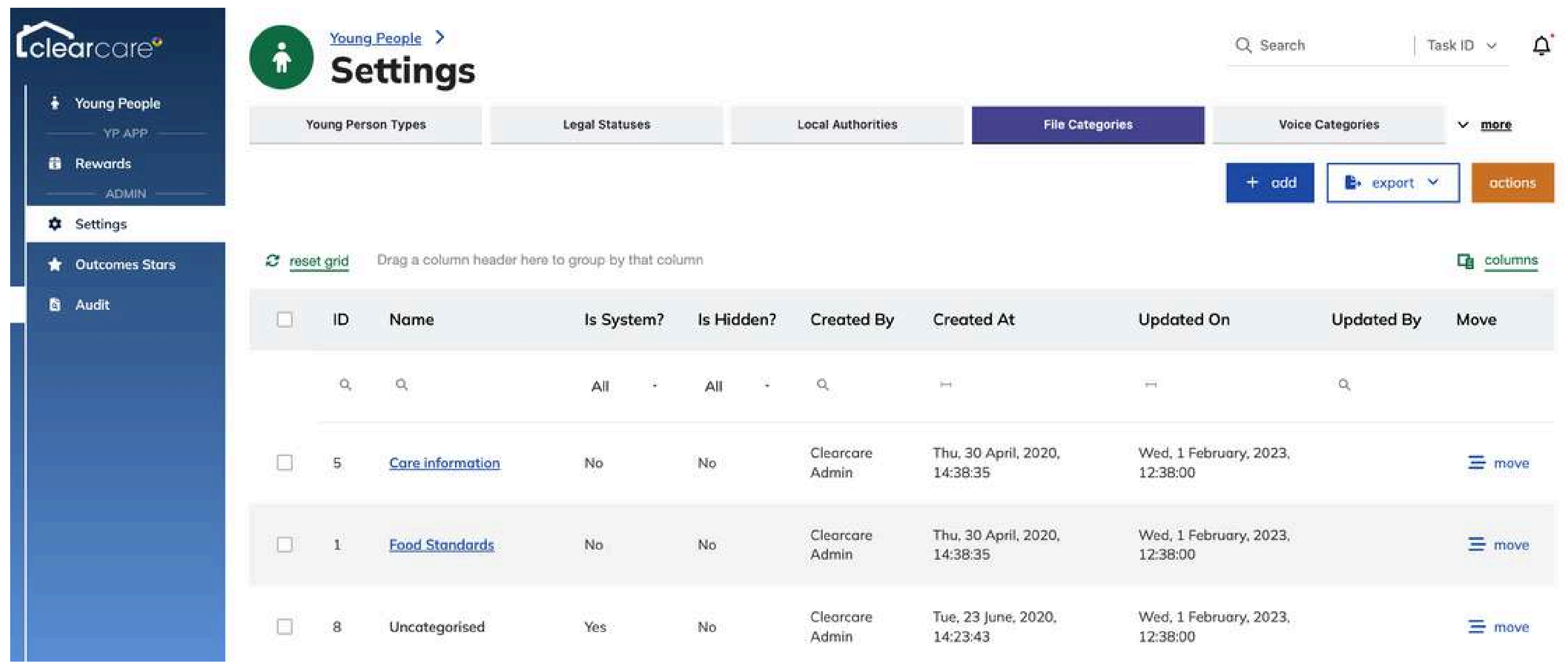
New file categories can only be added via a module's settings.

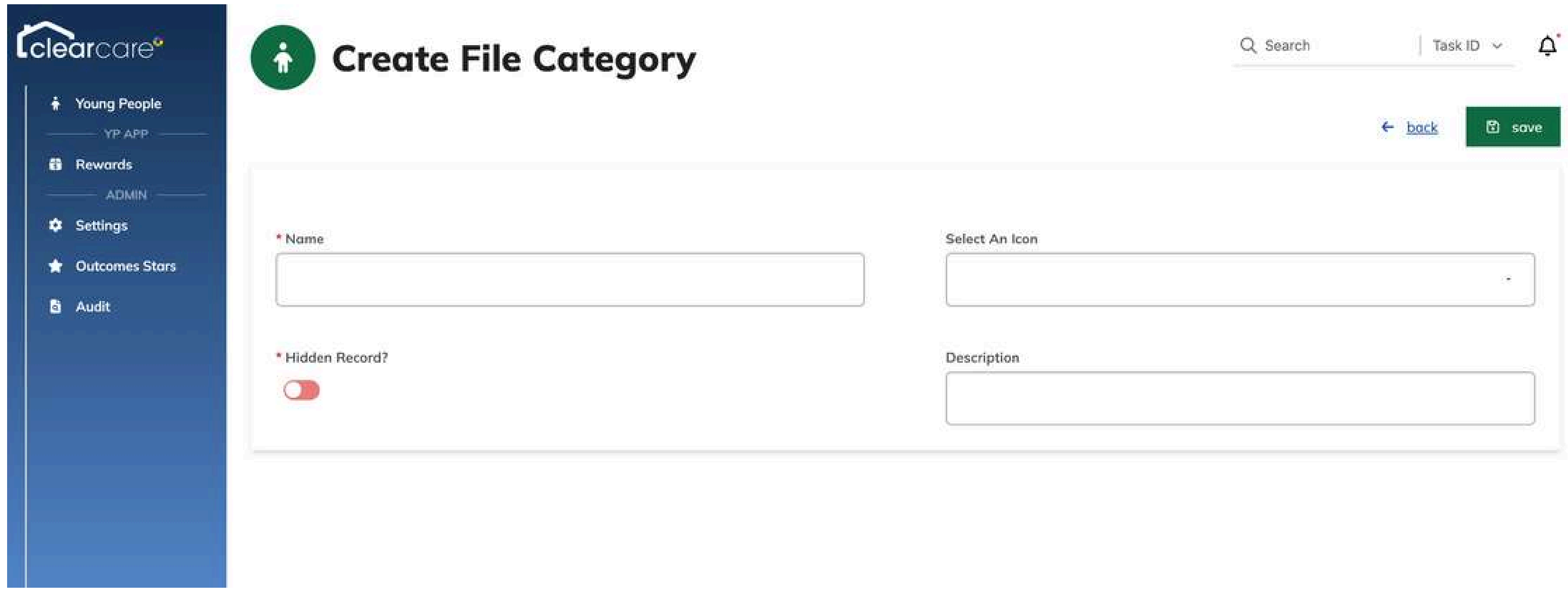
Click on your desired module and then select Settings from the side menu.

The settings window will open, with grey filter buttons at the top which let you switch between the elements you'd like to add to or change.

Select the button marked File Categories and then click the blue Add+ button to create a new file category.

This will open a new screen, where you can add information about the file before hitting Save.





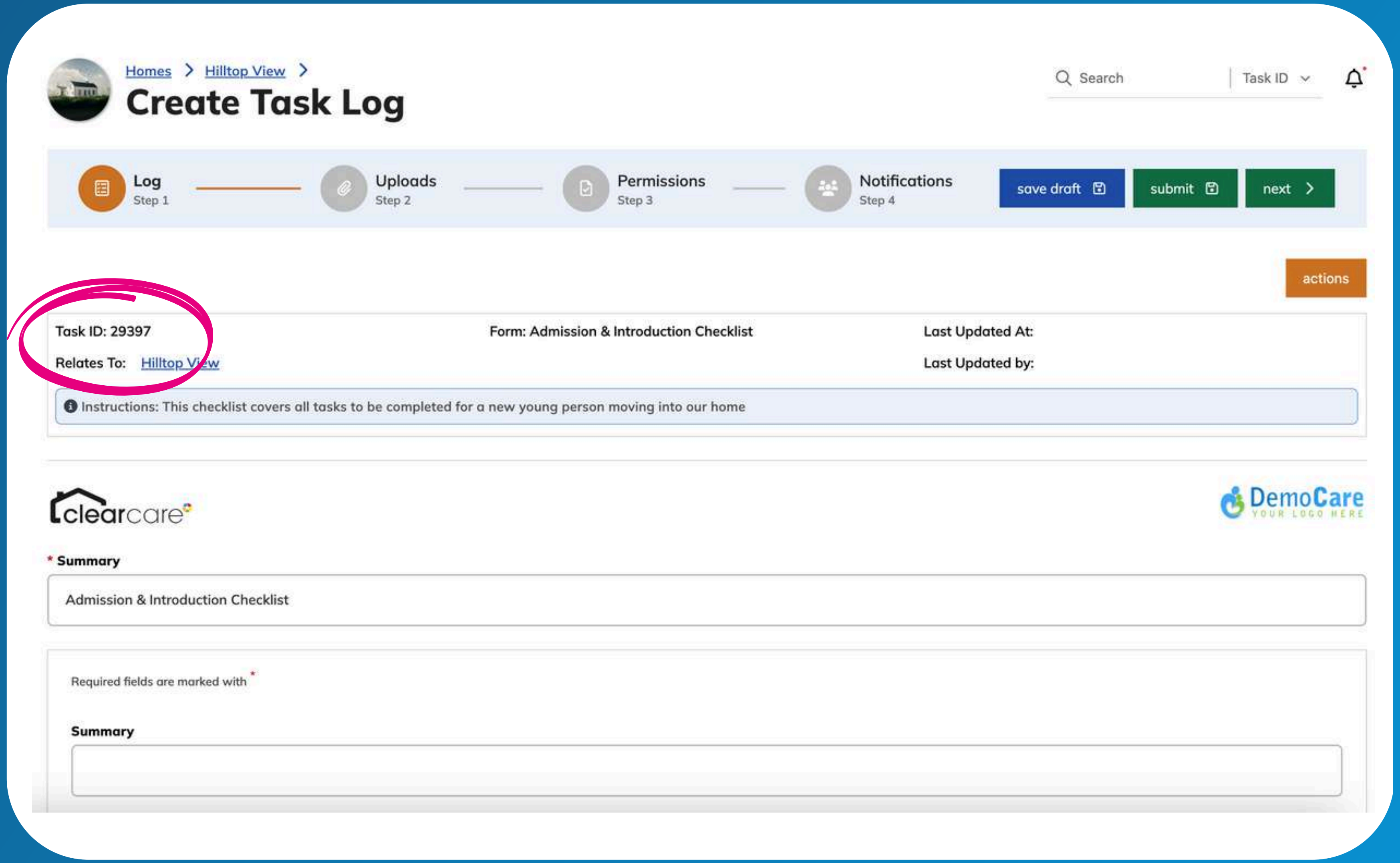
Completing Tasks & Logs

It is important to understand the correct procedure for completing tasks and logs, as incorrect use of the application may lead to inconsistencies when running reports. Your reports draw their information from the tasks and logs you complete daily. Clicking any task form will open it to be completed.

At the top of your task form to complete, you will see a Unique Task I.D. The Unique Task I.D will remain with this task, even if it is updated, as this reference number relates to the event documented and the task itself.

Tasks must only ever be edited to amend information relating to the original event. For example, an Absence Form task would be generated for completion on a particular date and relate to a singular absence. Should you wish to complete a new absence task, a new task must be generated and completed.

Each time this task is edited and saved it will be logged and a new Log I.D generated. This means that you can have one Task I.D number attached to multiple Log I.D numbers, each showing the individual edits of that task.

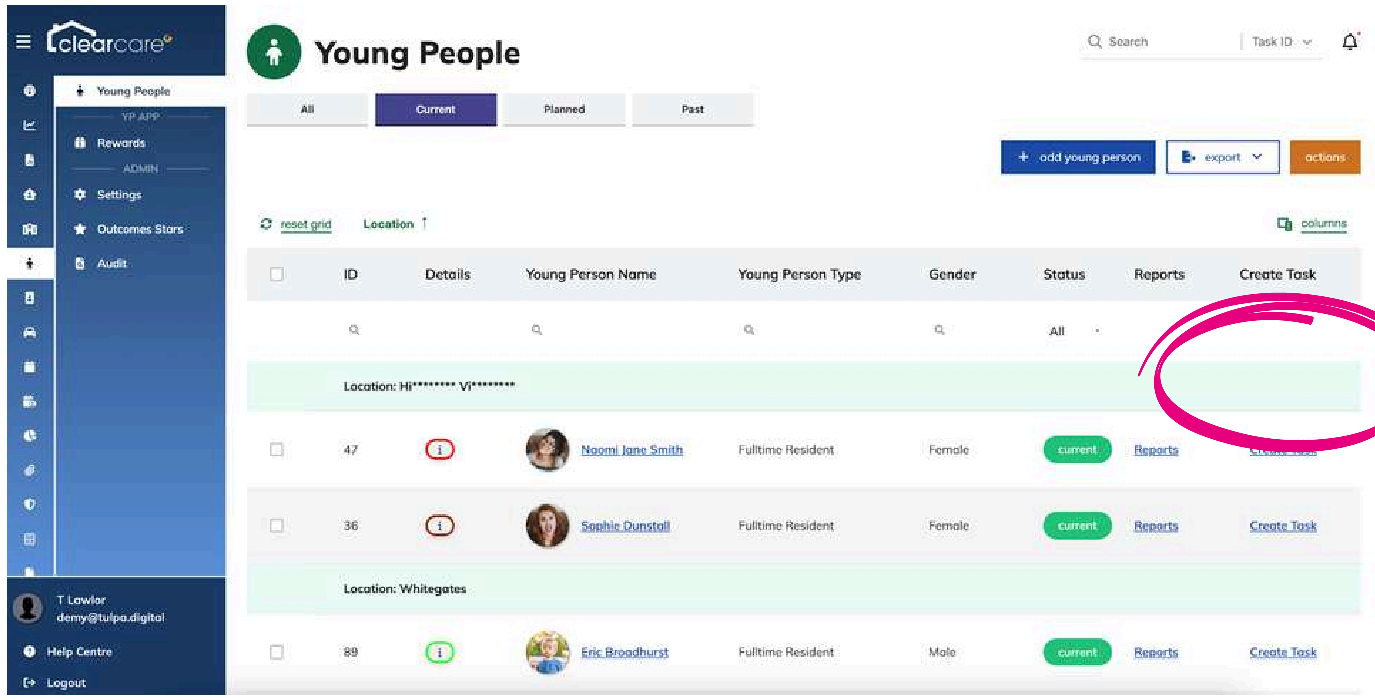


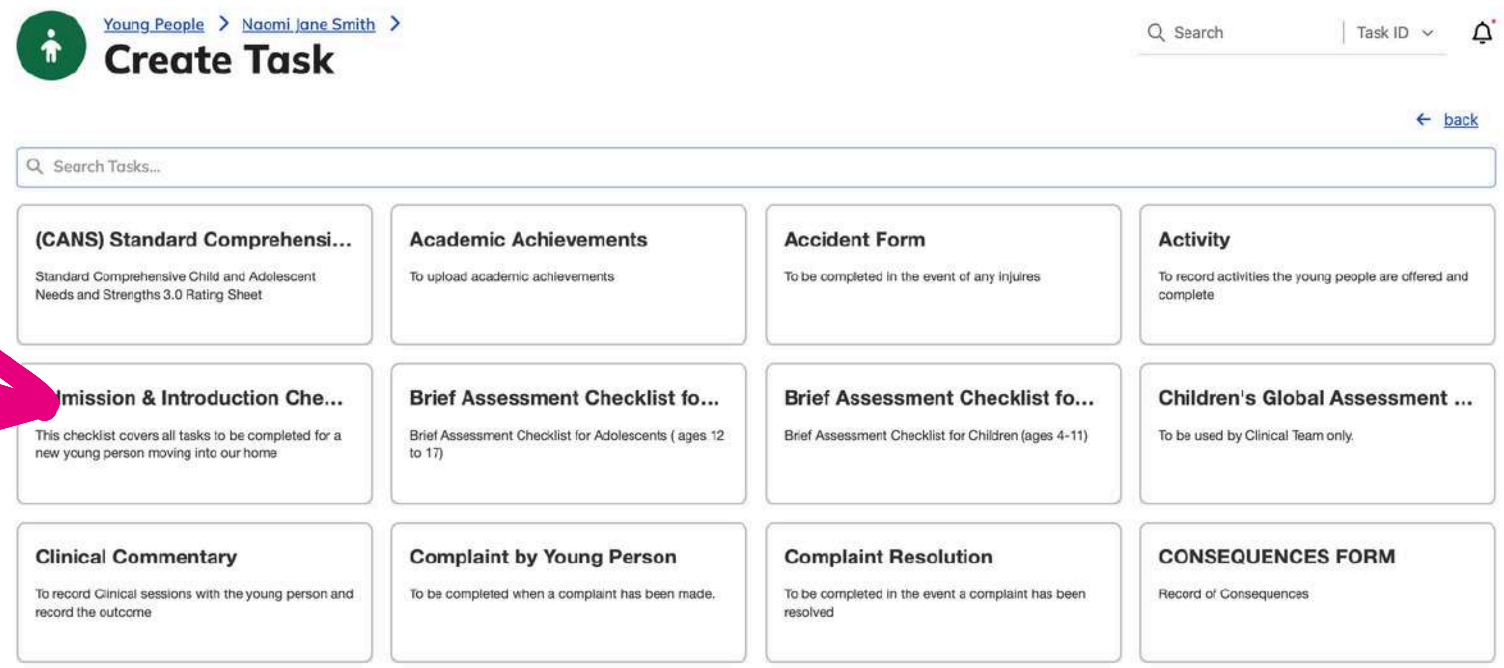
One-Off Tasks

Procedural tasks are usually found and completed in the My Summary module, where they are organised on your to-do list, or through the summary data cards. These relate to scheduled or procedural events, such as Daily Handovers, Daily Summaries, Freezer Temp Checks and more.

On the other hand, one-off tasks are completed as part of unpredictable or non-procedural events, such as incidents, absences etc. These tasks are completed in the related module by selecting the young person or project in question i.e. for an incident involving a young person, you would visit the Young People module to find the task. In this example, we visit the module's main menu, and click Create Task next to the young person we want to log an incident for.

This will take you to a section where you can choose your one-off task, or find it use the search bar at the top of the screen.





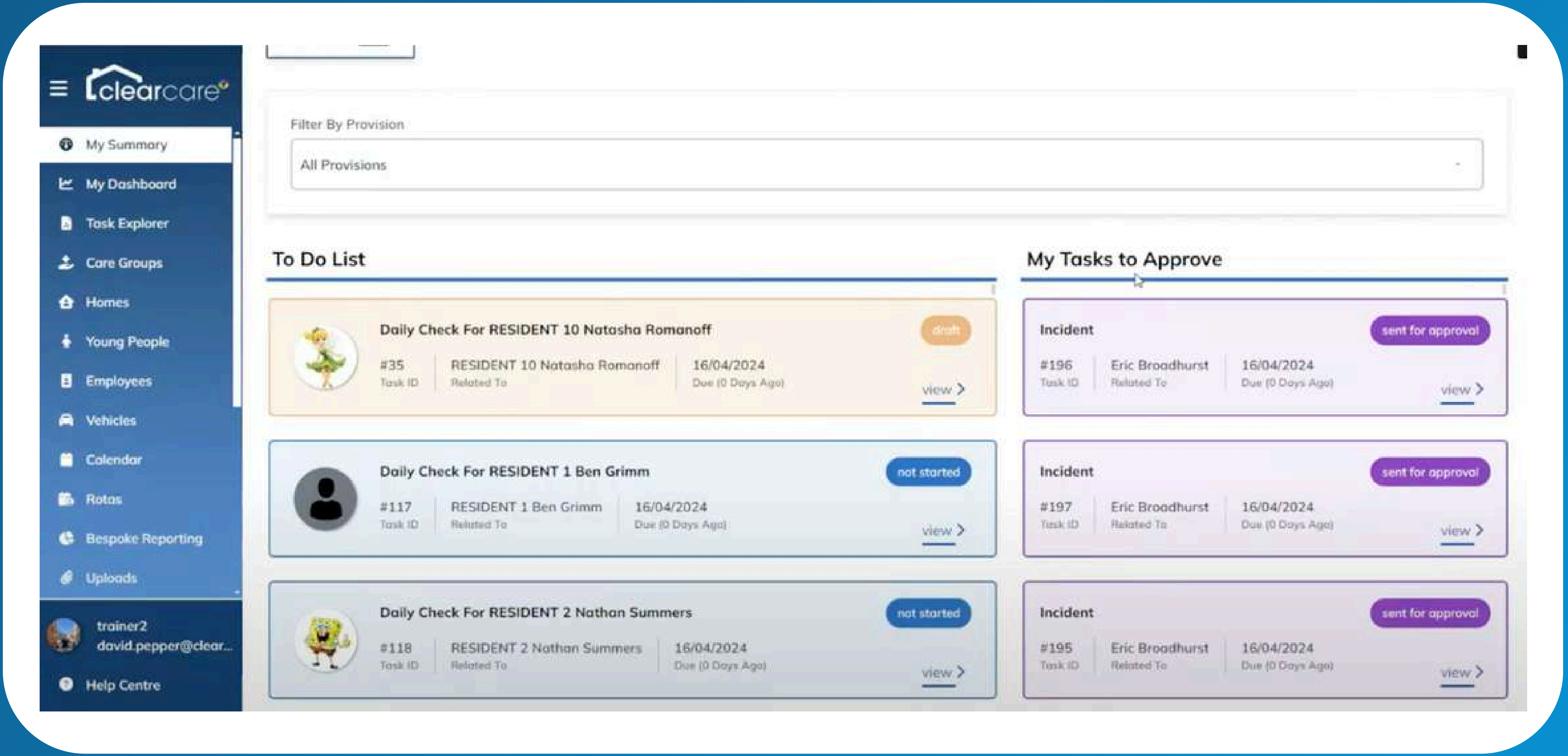
Approvals

As previously mentioned, some tasks have Named Approvers who can approve or reject certain tasks when they are submitted.

Your Summary module's data card will show how many submitted forms are waiting for an approval, but if you are not an approver you will not be able to approve them yourself.

When you are a named approver, tasks will be submitted to you for approval or rejection and will appear in your Summary module alongside your to-do list. From this list, click on any task and it will open up the full form for you to review.

When you are ready, you can click the Approve or Reject buttons.



Approved Tasks

When tasks are approved, they move into the relevant filing cabinet. For example, approved tasks relating to a young person can be found in their filing cabinet within the Young People module.

Rejected Tasks

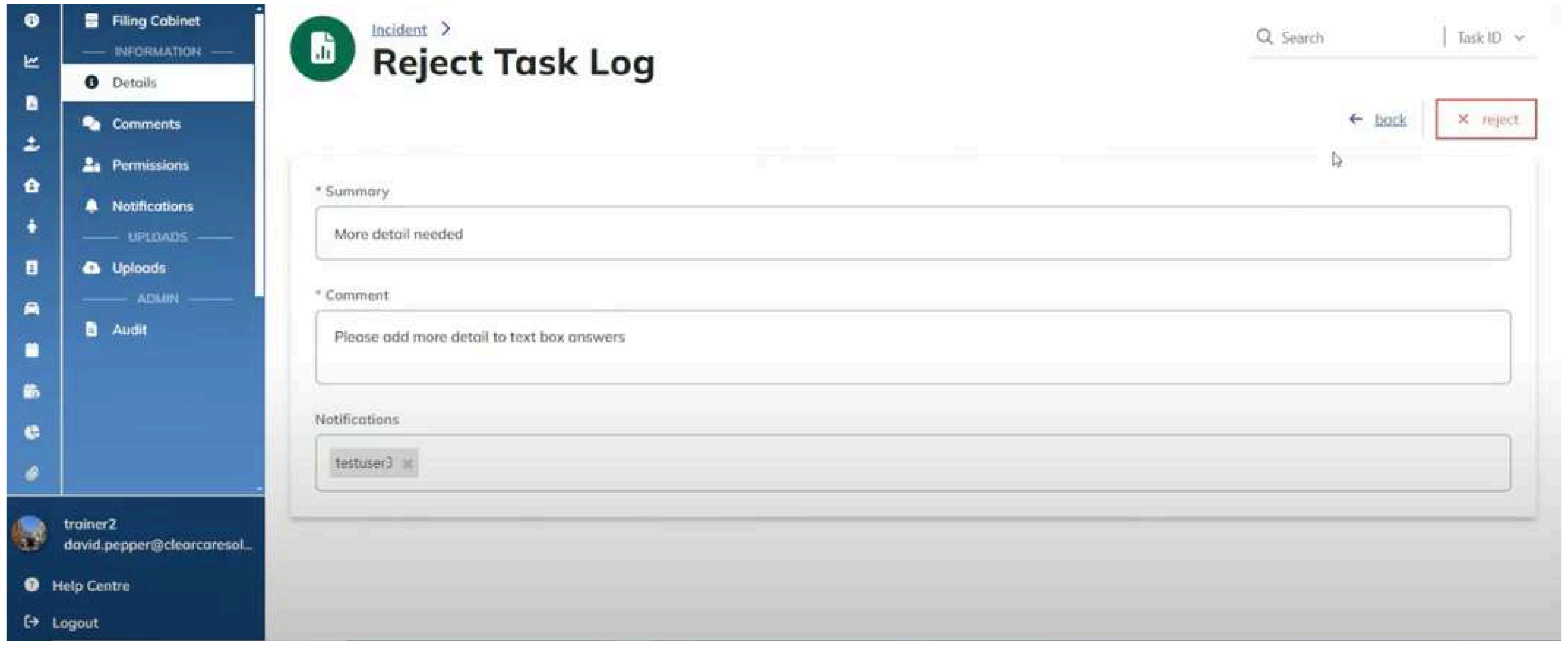
If you reject a task, you are taken to a new section where you can provide detailed comments to explain why. You can alert a specific user that the form requires further action by choosing their name from the Notifications dropdown list.

They will then receive an email notification that that their form has been rejected.

Rejected tasks appear in the Summary module within the Rejected Tasks data card.

To action a rejected task, users with the relevant permissions can click the data card and choose the rejected task from the list.

This will open the full form to review. You will also see a sub-menu with a Comments section, where you will find the approver's comments/feedback on why the task was rejected.

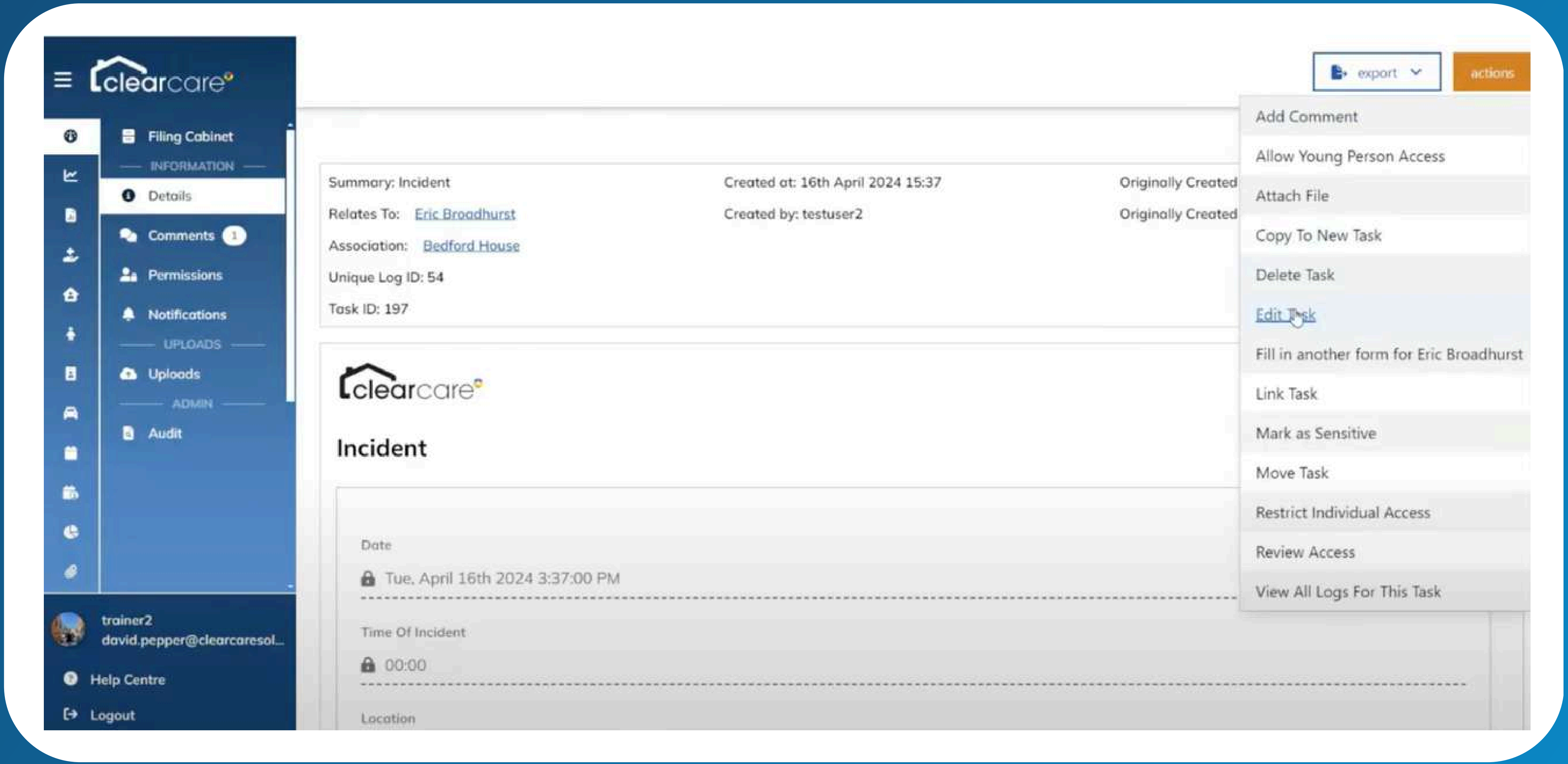


Editing and Re-Submitting a Task

Once you have accessed the rejected task, click the orange Actions button, and select Edit Task.

You will then be able to make changes in line with the approver's feedback before re-submitting the task for approval. It will then go back to the approver to be reviewed.

If you are an approver, re-submitting a task will cause it to be approved automatically.



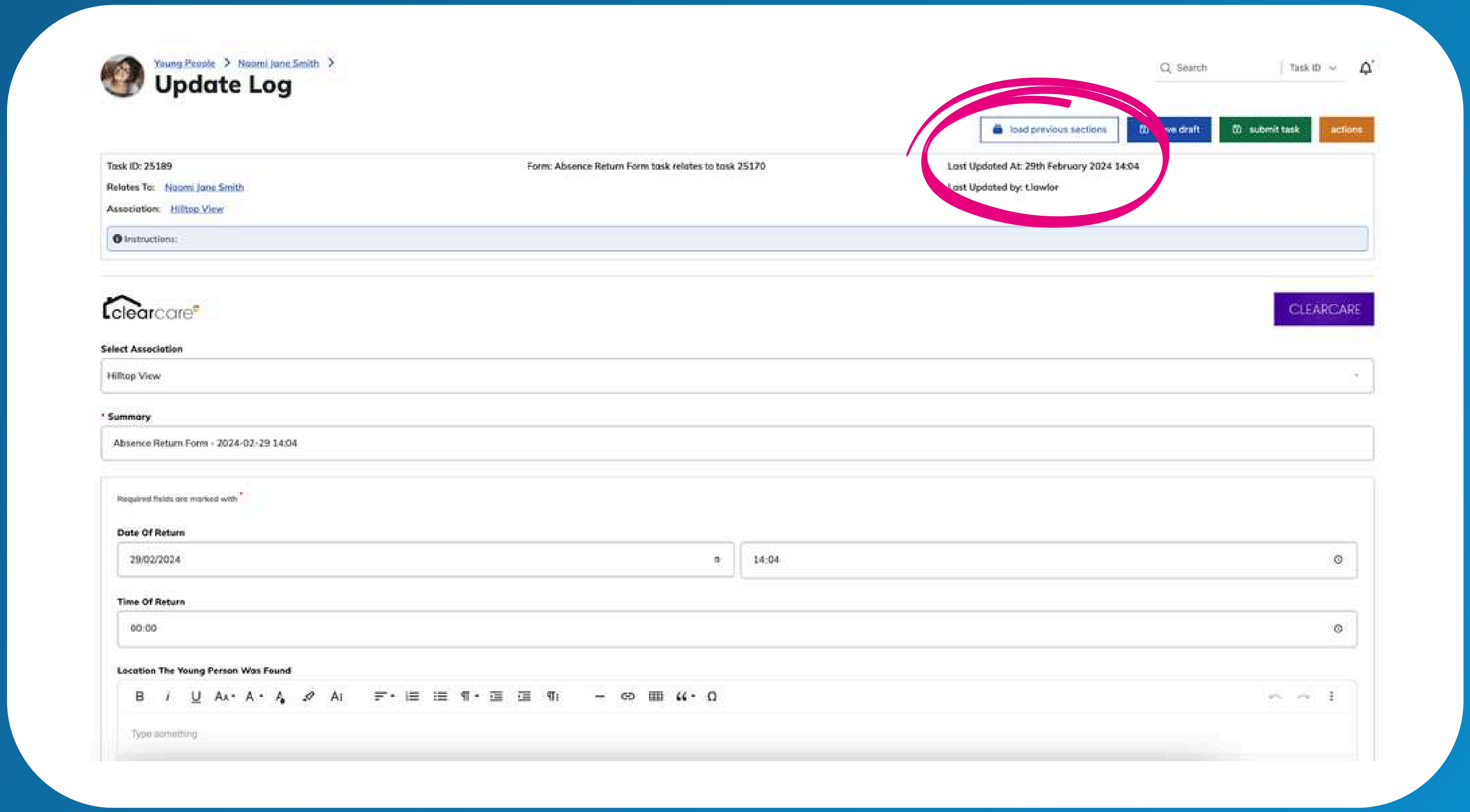
Workflow

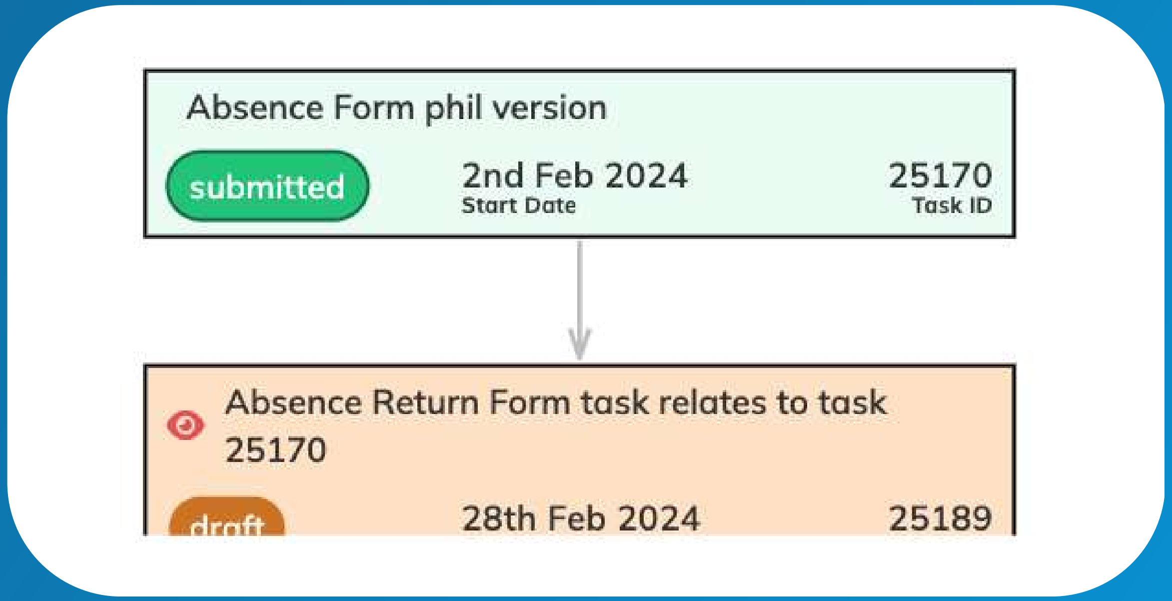
Workflow allows users to view any previous tasks in a chain of triggered tasks.

When opening a triggered task you will see a button marked Load Previous Sections. Providing you have permission, clicking this will display the previous triggered tasks from your flow of work.

This feature helps you to remain consistent in all related or follow-on tasks documenting one event.

You can also scroll down within the task to see a workflow overview chart. This simplified view helps you to see what your form or task relates to and how it has been managed up until this point.



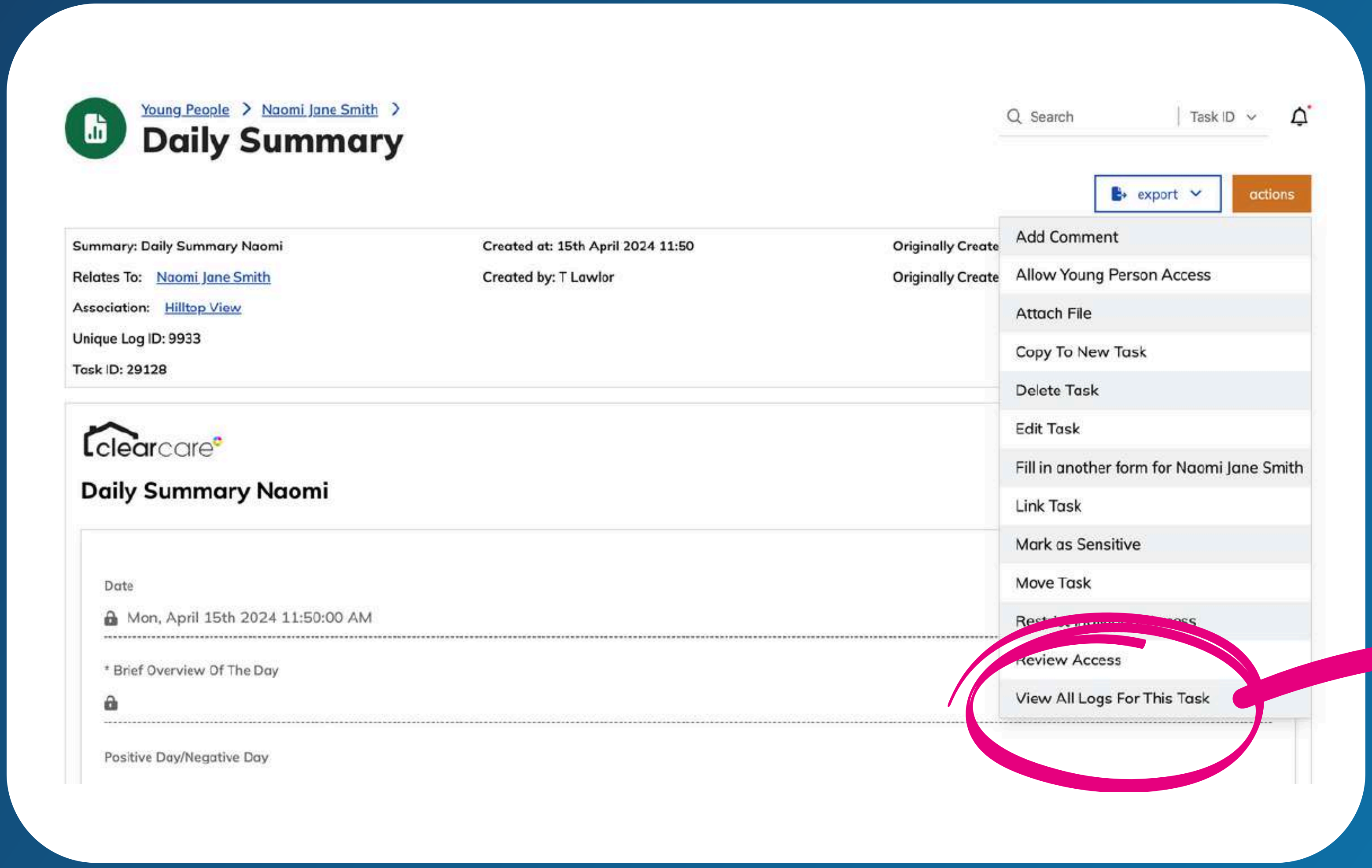


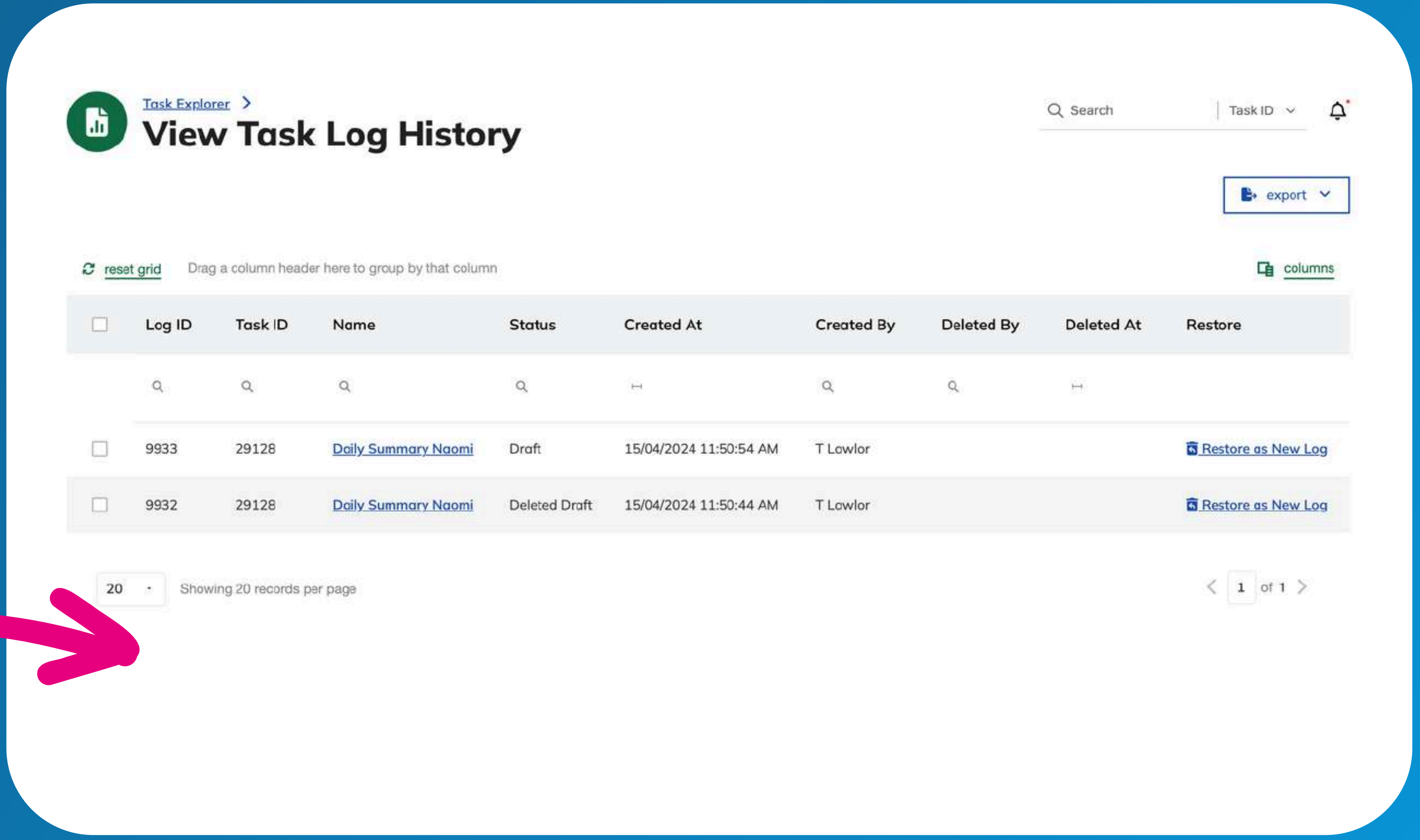
Previously Submitted Logs

You can also view all previously submitted logs for a particular task. When opening the task, you will see an orange button marked Actions.

Click this button to view a list of options, and select View All Logs For This Task.

This will open the View Task Log History section, where each submitted log is recorded separately along with details about who created it, when it was created etc. Click an individual log to review it.

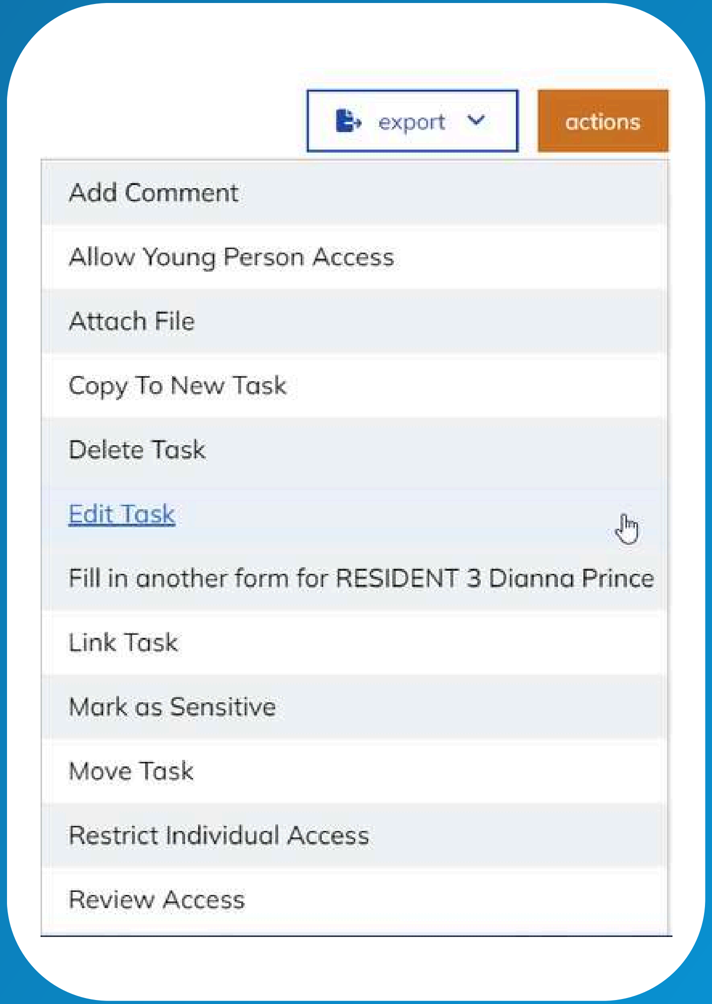




Retrieving and Editing Tasks

A submitted task can be accessed by clicking the task in the filing cabinet of its related project. For example, to find tasks related to a specific vehicle, you would start by selecting the Vehicles module, before clicking on the vehicle you require to
see its filing cabinet and full list of tasks.

The Task I.D number and Summary field are shown in the list to make your task easier to identify. Once selected, you will be taken to the submitted task where you can utilise further functions.



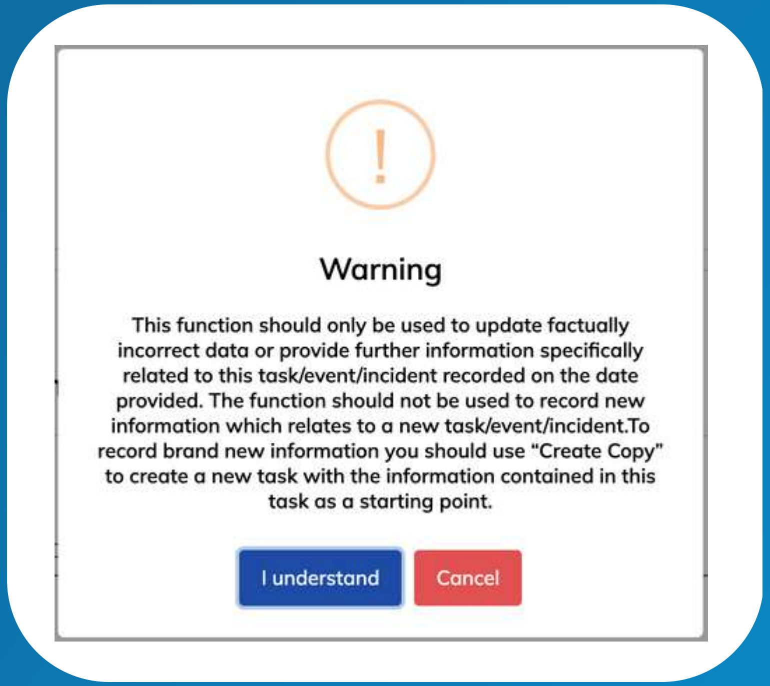
When it comes to editing, commenting or adding information to an existing task, we have housed all of these actions within a single button for simplicity and ease of use.

When you open a task, you will almost always see the orange Actions button in the top-right corner of the task view. Click this button to open a dropdown of options.

The buttons and options you see will depend on what permissions you have as well as the nature of the task/project, but in most cases you will be able to use this button to:

Edit the Task

Clicking the Edit Task button, providing you have permission, will take you to an editable version of the task, for you to edit or add further information relating to the original event. This action will be visible for up to 9 months after the original task was generated, giving you ample time to add any further information relating to the event. The task must only ever be edited to add information which relates to this specific event.

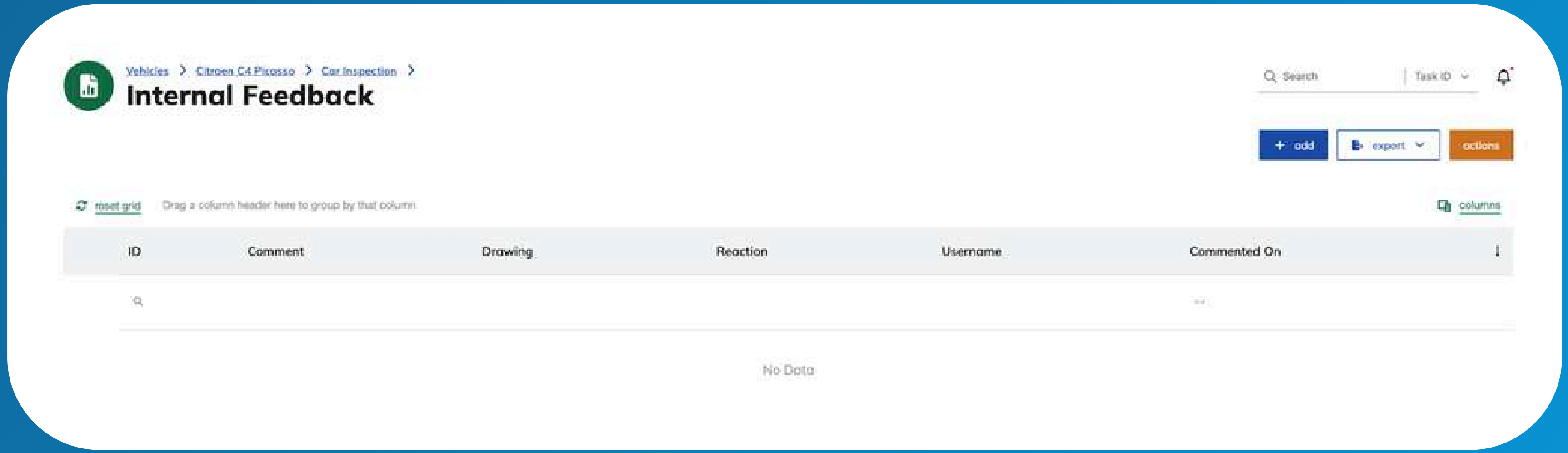


A pop-up window will appear when you click this button, for you to acknowledge that you are amending or adding to the original documentation of the event. After submitting, your changes will appear as an additional log on this task.

Add Comment

Clicking the Add Comment button, providing you have permission, will give you the option to add a comment to a submitted task.

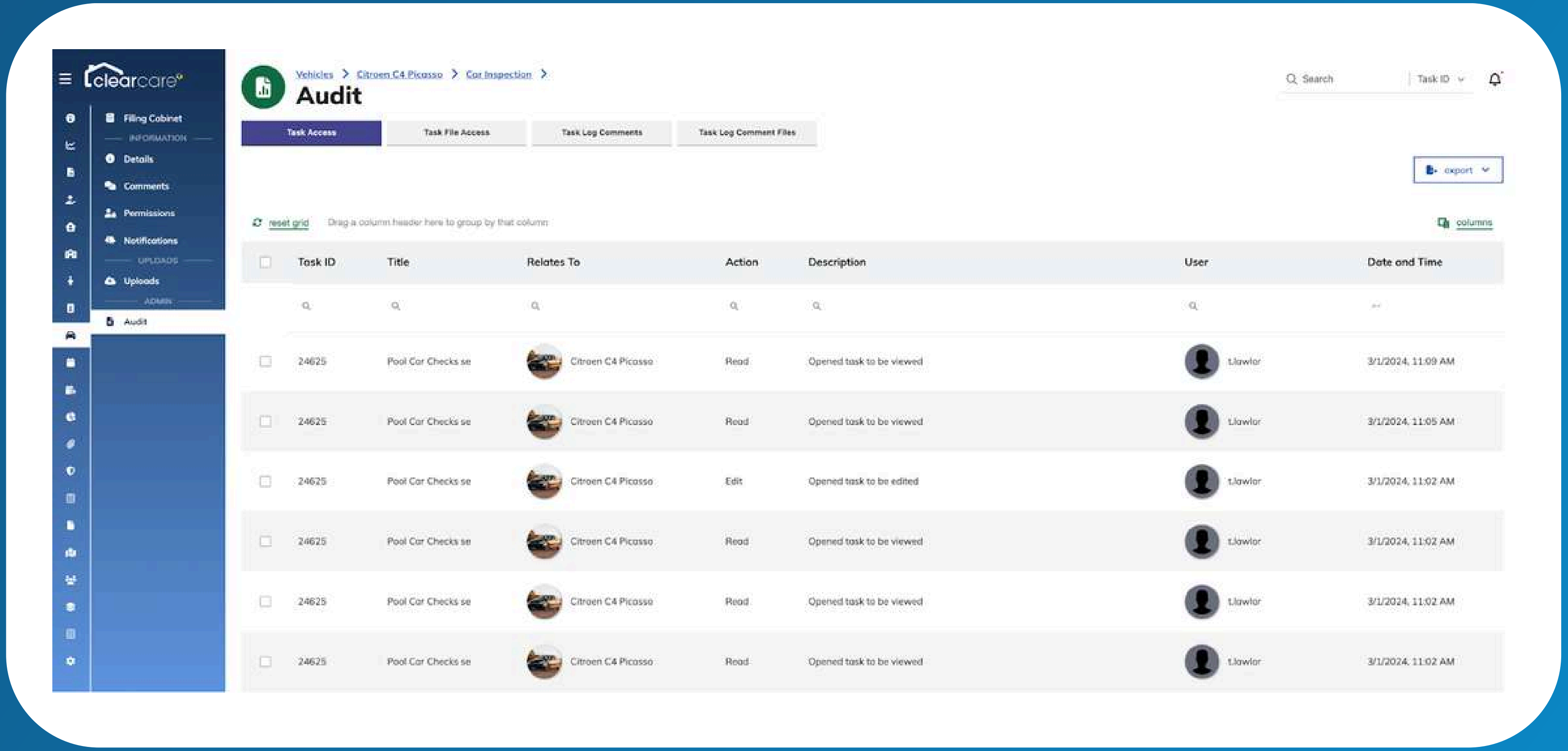
Submitted comments can be found in the Comments section of the filing cabinet, located in the side menu.



Review Access

Clicking the Review Access button, providing you have permission, will allow you to see all interactions with this task. Selecting this option will take you to the Audit section of the filing cabinet, where each interaction with this task has been logged and listed.

You can use the grey filter buttons at the top of the screen to review different types of access.



Allow Young Person Access

If a task directly relates to a young person, you can use this action to give them access to view it.

A young person with a user profile can access this task by logging in via the app (if this has been set up for them).

When you allow access to the young person, you will see a popup notifying you that the task has been successfully updated.

Mark as Sensitive

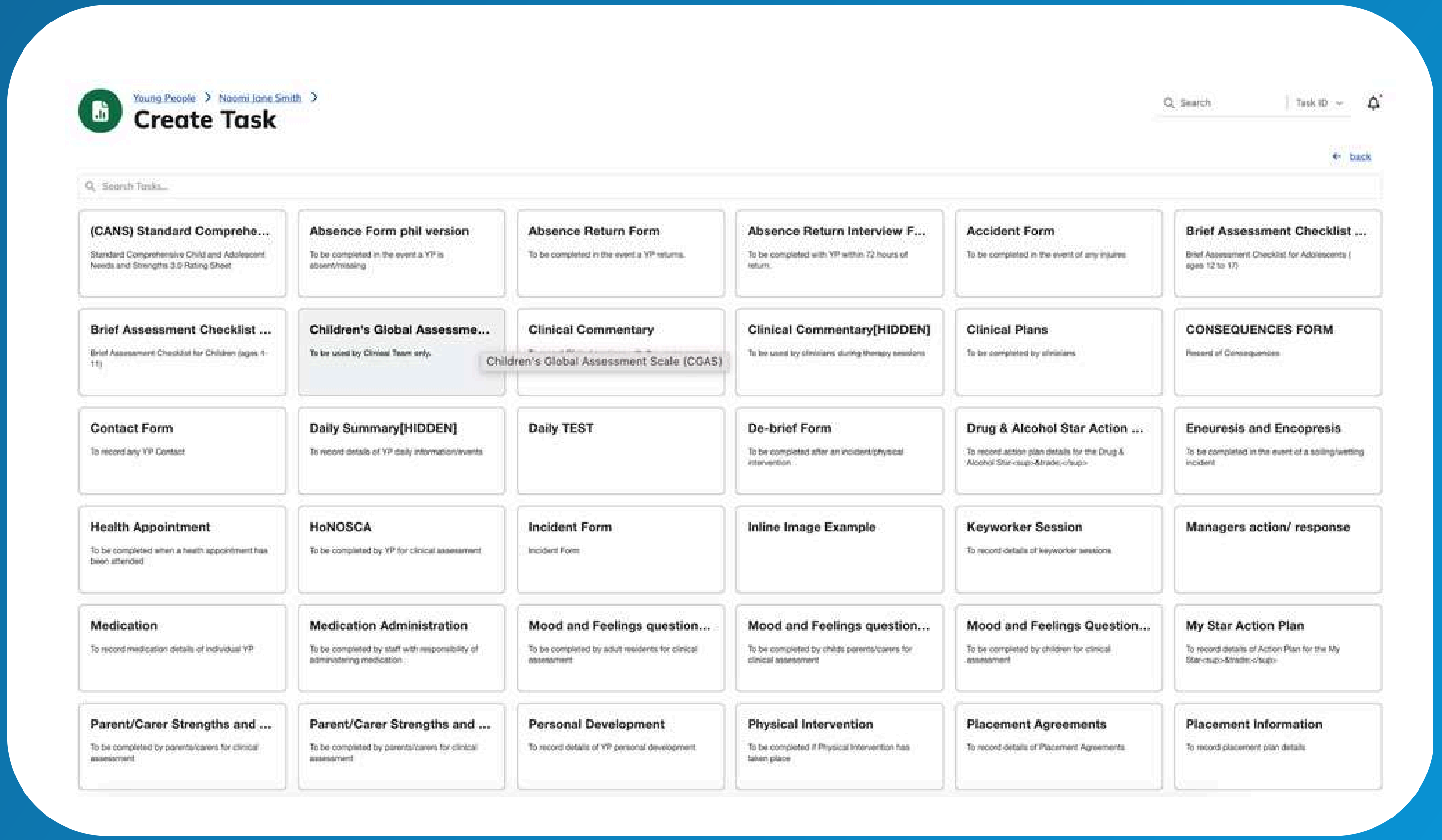
Clicking Mark As Sensitive will classify this task as sensitive. This means only users with permission can view the task. The task can then be found in the Sensitive Data module, if classified as sensitive, or (only for users with access) in the relevant filing cabinet marked with a small shield icon.

Any user can mark a task as sensitive.

Fill in Another Form

Clicking Fill In Another Form For... will open up the list of available tasks for you to select to complete for this project.

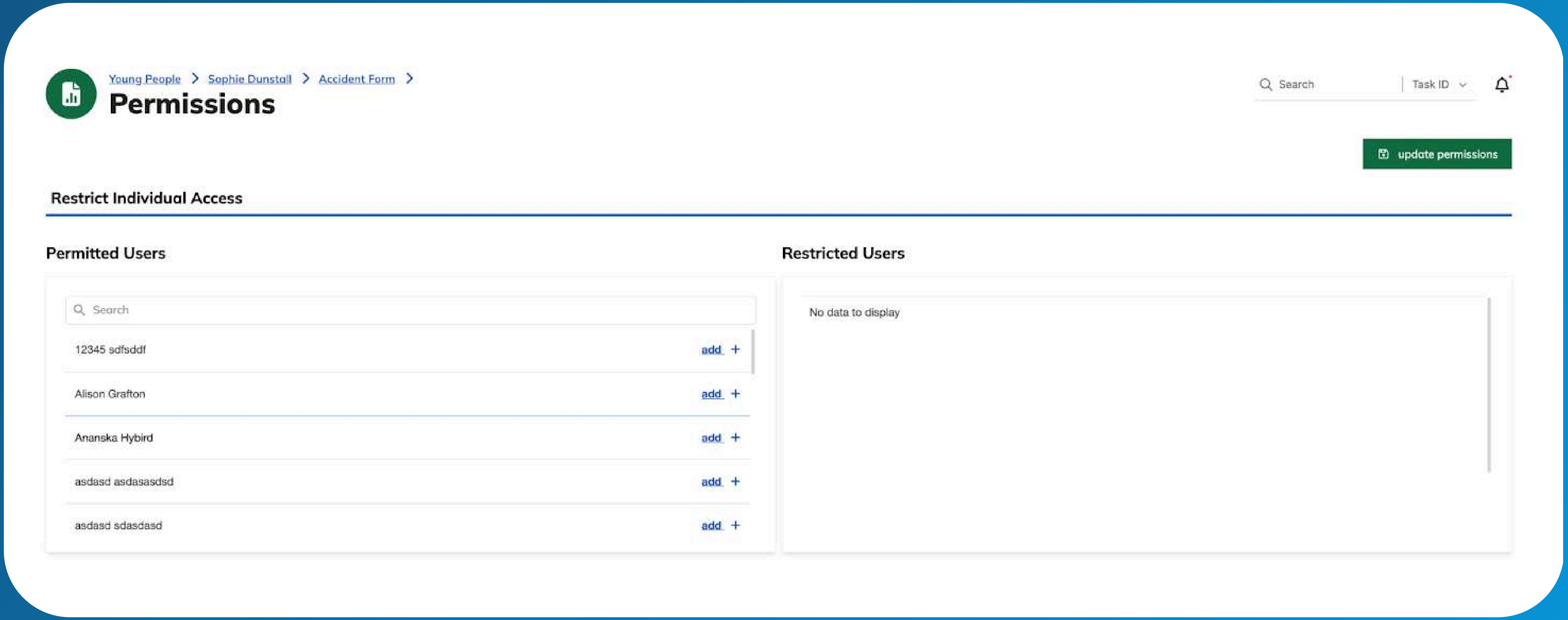
This is the full list of tasks you would always expect to see when creating a new task from scratch. This is a useful shortcutting tool when you need to fill out another task for the same project.



Restrict Individual Access

This function will allow the user to hide this task from a specific staff member or members. This could be used, for example, when logging a complaint about another member of your team.

To hide your submitted task from other staff, click Restrict Individual Access. This will open up the Permissions section of the filing cabinet, which can also be accessed from the left-hand menu. On the left is a list of all users; on the right is a list of users who will be restricted from seeing the task. Names can be moved from the list on the left to the list on the right by selecting the plus icon next to the user's name.



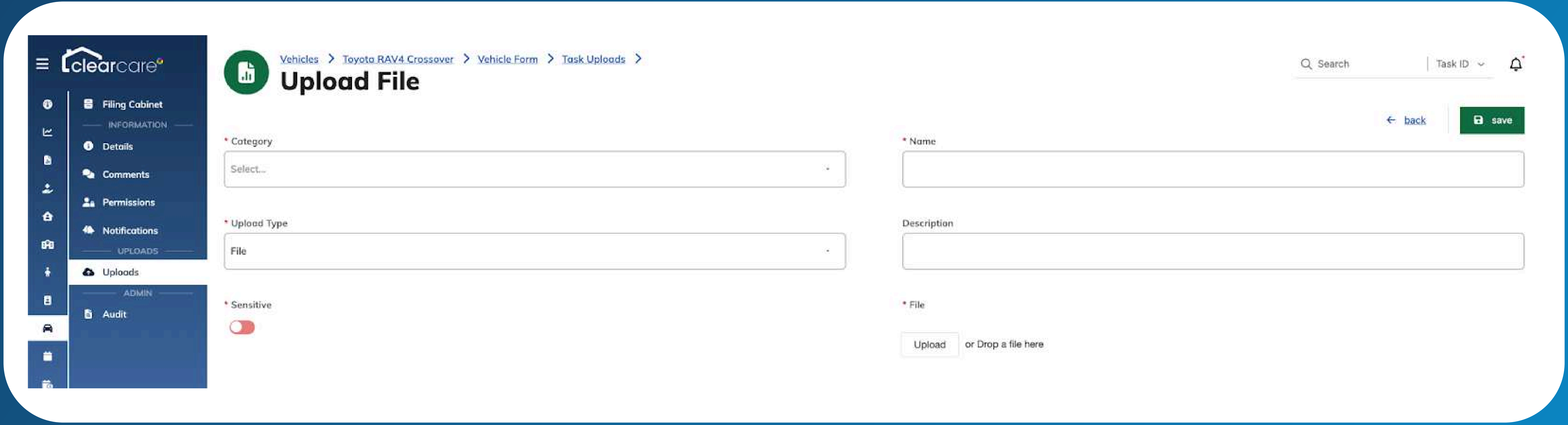
Attach a File

Clicking Attach File, providing you have permission, will give you the option to upload an attachment to the task.

Selecting this option will take you to the Uploads section of the filing cabinet where you can click Upload. This will open up your own file list to choose the files to attach. To select multiple files to attach, click on a file, hold down the Control (Ctrl) key on your keyboard and then click on any additional files you want to add.

If working from a Mac, substitute the Control key for your Command key. Double clicking on the final file to attach, or clicking Open when all required files are highlighted, will attach these files to the task.

Ticking the Sensitive checkbox will mark your attachment as sensitive. Once complete, these files will then sit in the Task Uploads section of the filing cabinet.

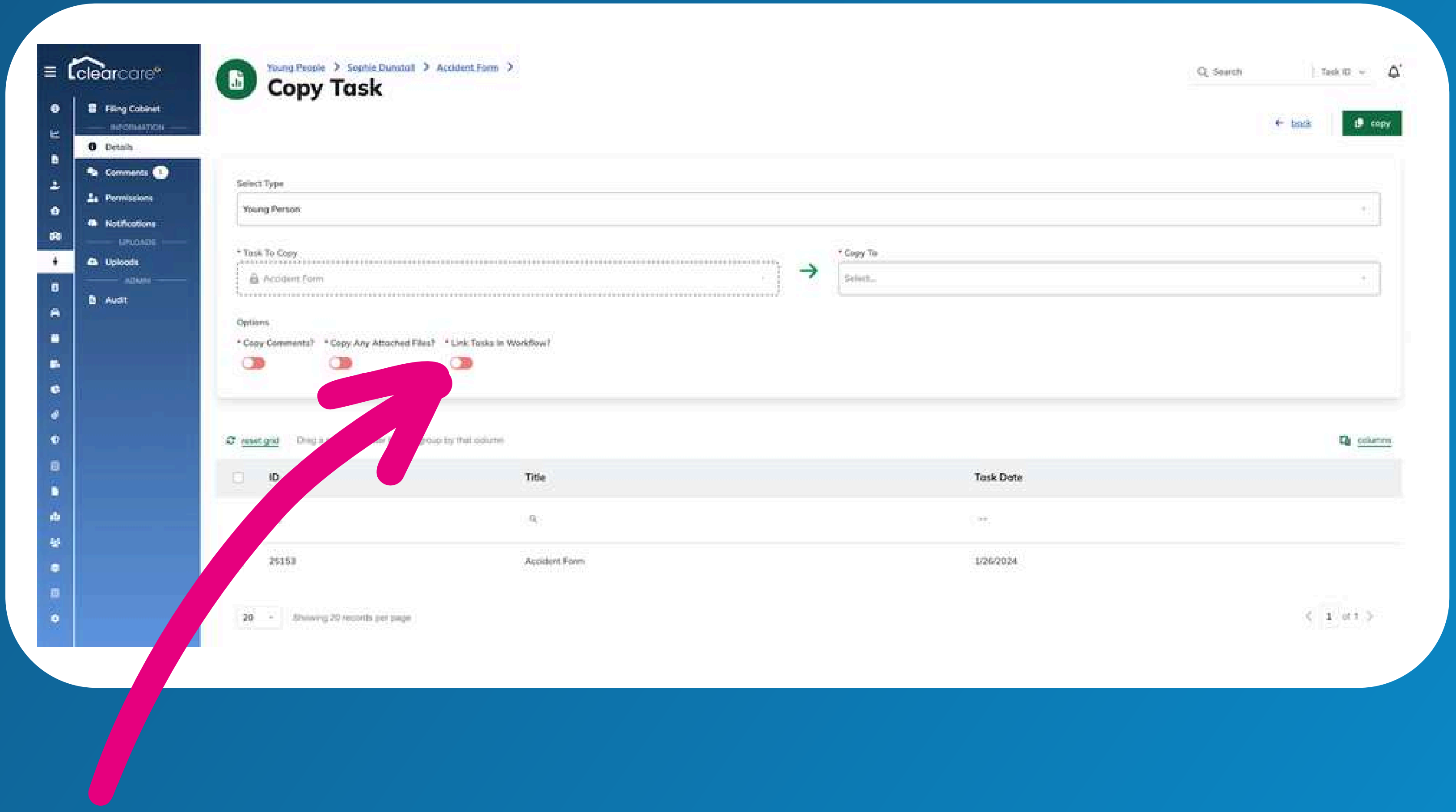


Copy to New Task

The Copy to New Task function will give you the option to generate a new task that retains all of the input information from this current task. This is useful for when more than one task needs to be created for a very similar event - for either the same project or a different project.

Toggling the switches to copy any attached documents or comments will also move them to your newly generated task. Selecting Submit will take you to the task edit screen for your new task. This will create a fresh task with its own Unique Task I.D.

The form fields will already have retained the information submitted in your previous task and brought across any files or comments (if you have chosen to do this). Use the dropdown menu to choose where you want to copy your task to.



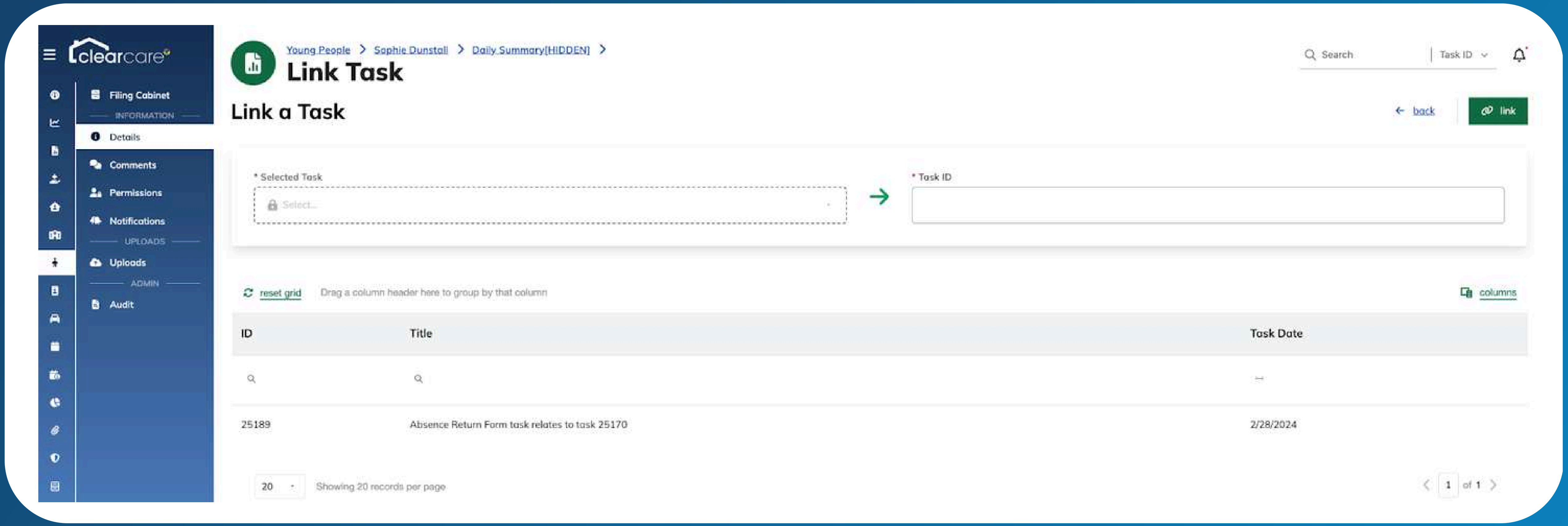
Clicking the Link Tasks in Workflow option will mean that current triggered tasks, that appear as part of workflow, will also appear as part of the newly copied task. This means you have less editing to do when completing multiple similar tasks. Following this method for "Ongoing forms" such as Placement Plans ensures that all of your task data can be accurately recorded for reporting.

Link Tasks

This field allows you to place a link to a previously submitted task on the task form you are currently completing.

When you have opened your desired task or form, click the Actions button and choose Link Task.

You will then be taken to a screen that lets you choose from a list of previously submitted tasks, or enter the Task ID in the top right-hand field.



Form Fields

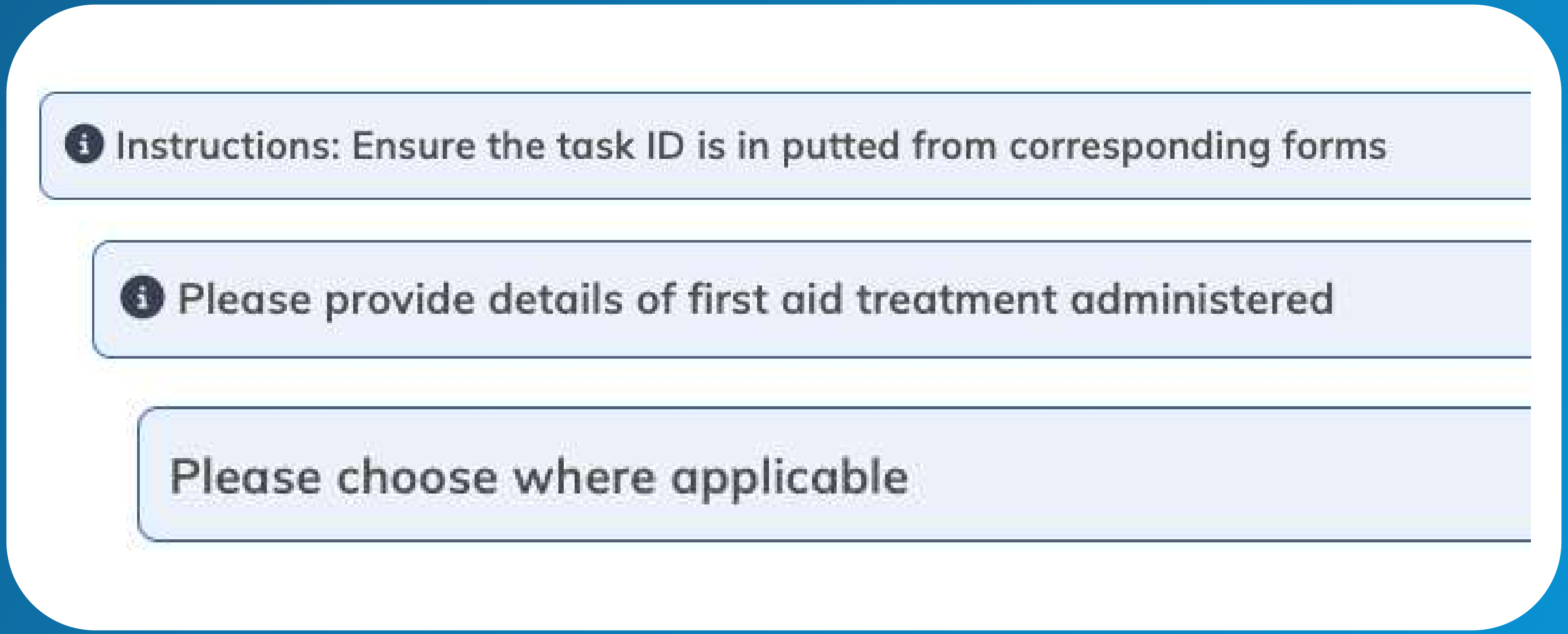
When building and completing forms in Clearcare, there are various fields within the forms that have different functions. Some will be standard fields that you are likely to already be familiar with, such as:

- Toggle Switches
- Date Fields/Date Pickers
- Text Fields
- Number Fields
- Drop-Down Lists
- Checkboxes

In addition to these standard fields are other form functions that have been developed to make recording information easier. Your Clearcare task forms will all have the facility for administrators to add instructions and "guidance bubbles".

When completing or editing a task, certain fields will have accompanying instructions to help you collect the exact data without room for error.

Here are some examples you might see:



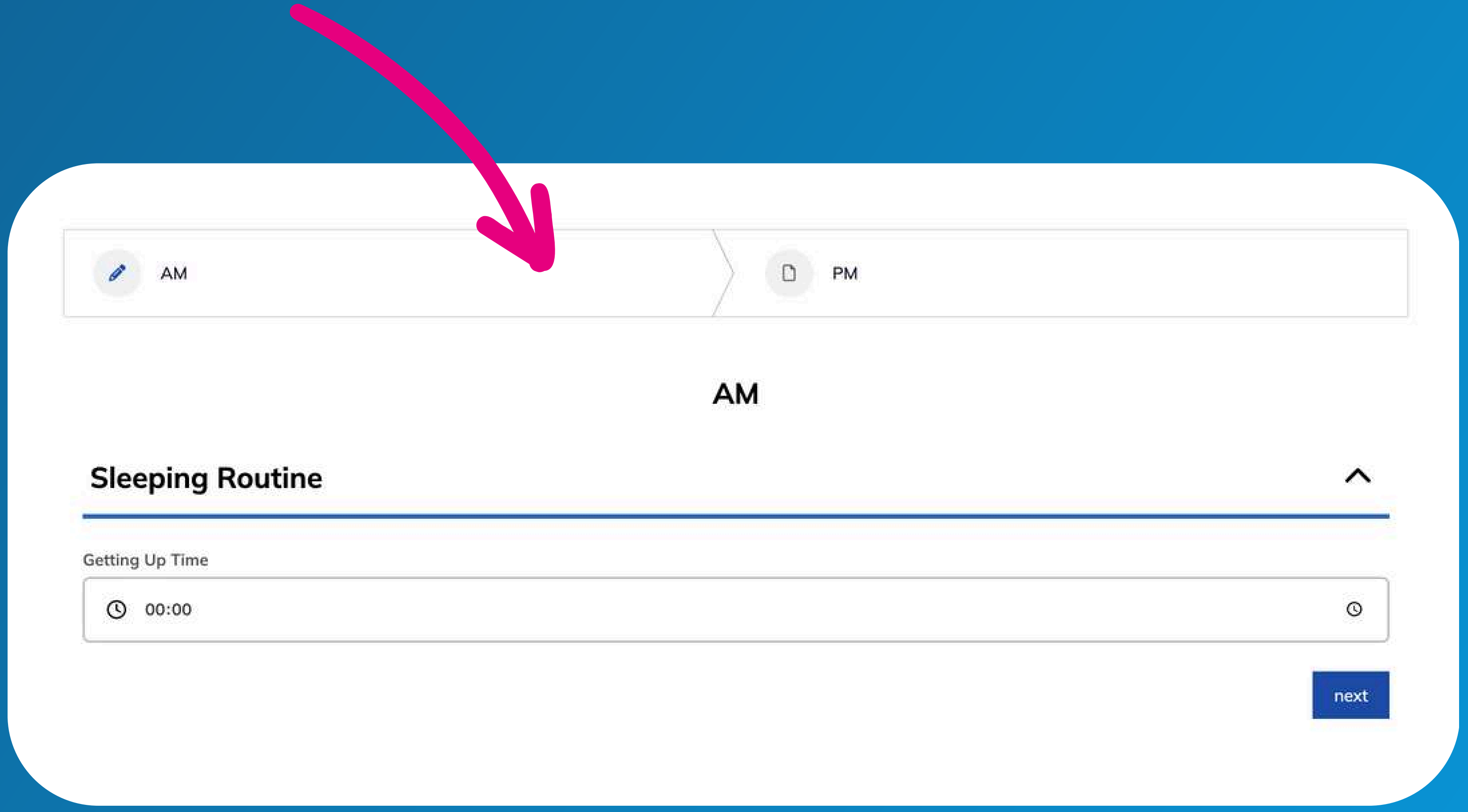
Multi Step Forms

Forms can often have different sections with information to be entered relating to different facets of an event. This can make forms very long and complicated.

The Multi Step Form feature allows 'section headings' to be added to forms to make accessing parts of the task form faster and easier for you. These section headings may be named according to section.

For example, a Daily Summary form could be split into sections AM, PM and Waking Night. To skip to a section of the form, click the relevant step at the top of the screen. For example, clicking Waking Night will skip to that section as shown below. Once completed, your section(s) of the form can be saved as a draft or submitted.

When using the form builder, you can add separate Multi-Step Form Sections which effectively split a section of the form into two or more parts that can be filled out or skipped over depending on the nature of the information you wish to record.



Text Fields

Text fields can display different types, styles, sizes and colours of text. You can select the text style from the toolbar above your text field. These options include size, bold, italics, coloured text, highlighted text, bullet lists, and numbered lists. A word counter in the bottom-right corner keeps track of how much text is required, or how much you've written.

Your selection can be cleared by selecting the Tx icon.

Related Tasks

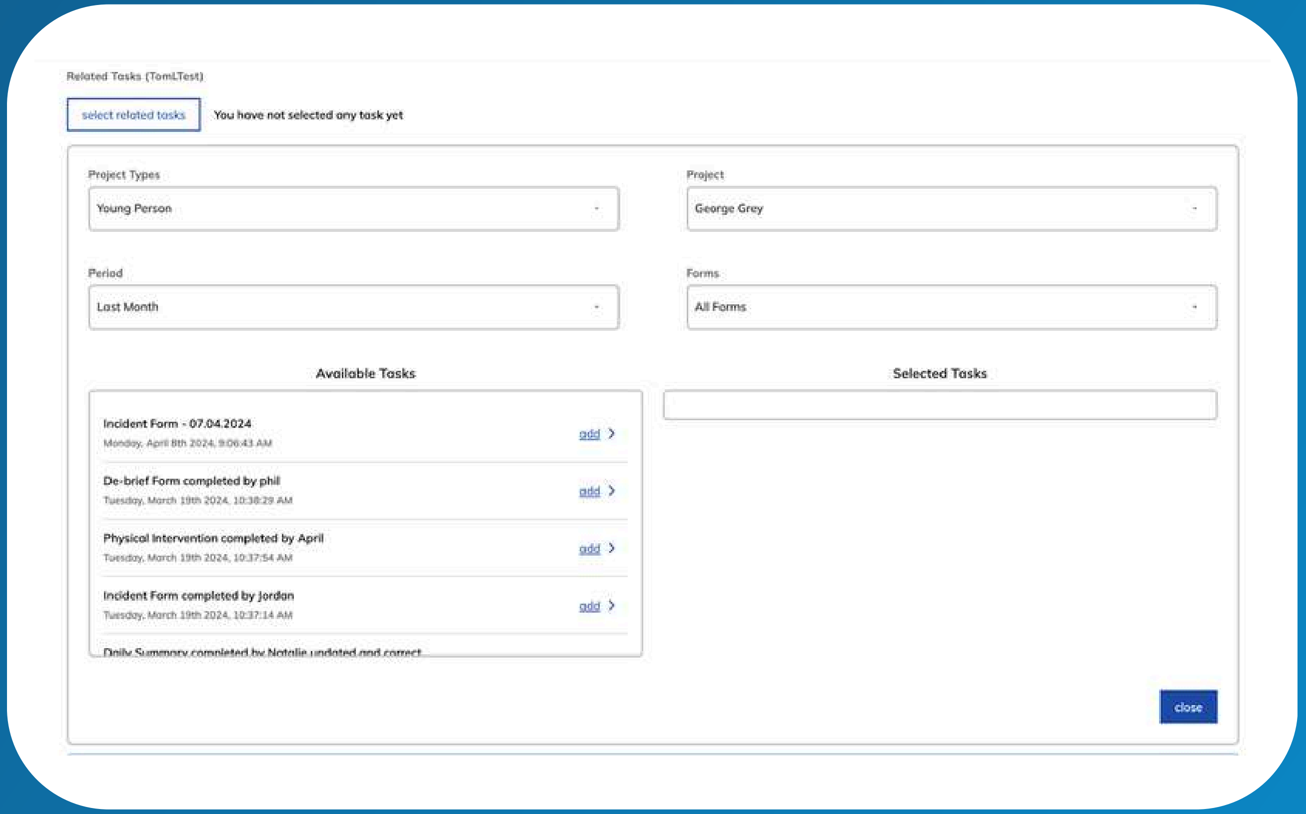
When completing certain task forms, you will notice a field that allows you to specify previous tasks that are related to your current activity:

Related Tasks (cont.)

To link a previous task to the form, click the Select Related Tasks button and enter search parameters using the drop down lists and date range fields. This will show a list of already submitted tasks that match those criteria.

You can select multiple items from the Available Forms list and move them to the Selected Forms list by clicking the add button next to each task form you want to link to.

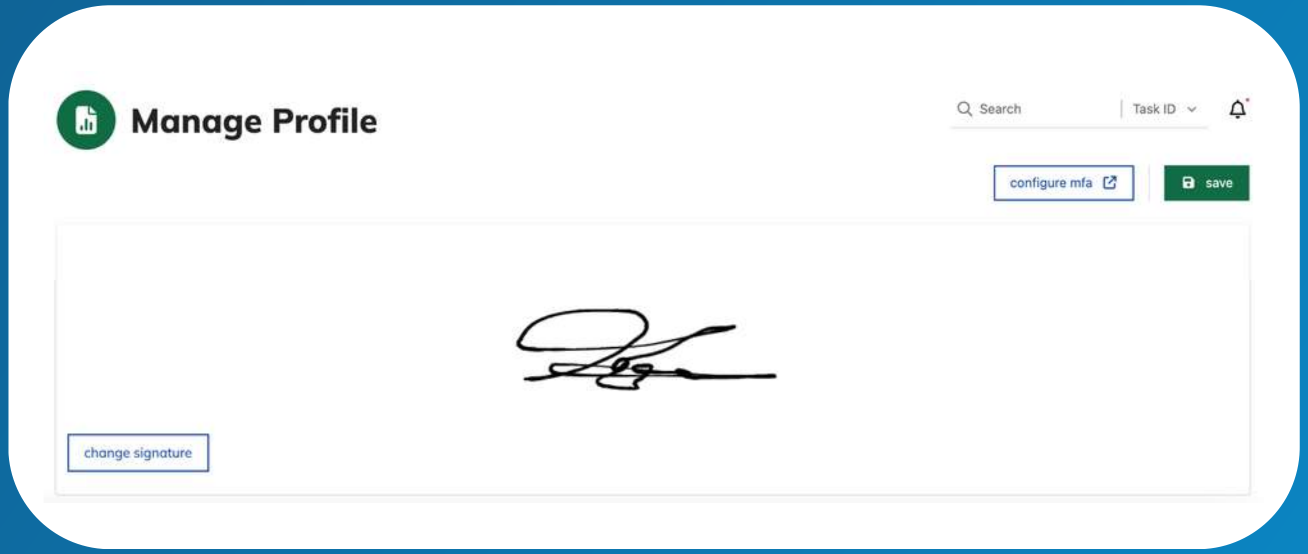
Close this window to save these changes, and return to your task edit screen. The task forms selected will now appear as clickable links that will direct you straight to the linked task.



Signature

This field gives you the option to put your signature on your task. You can also choose whether to add a signature field on your own form during the form building process.

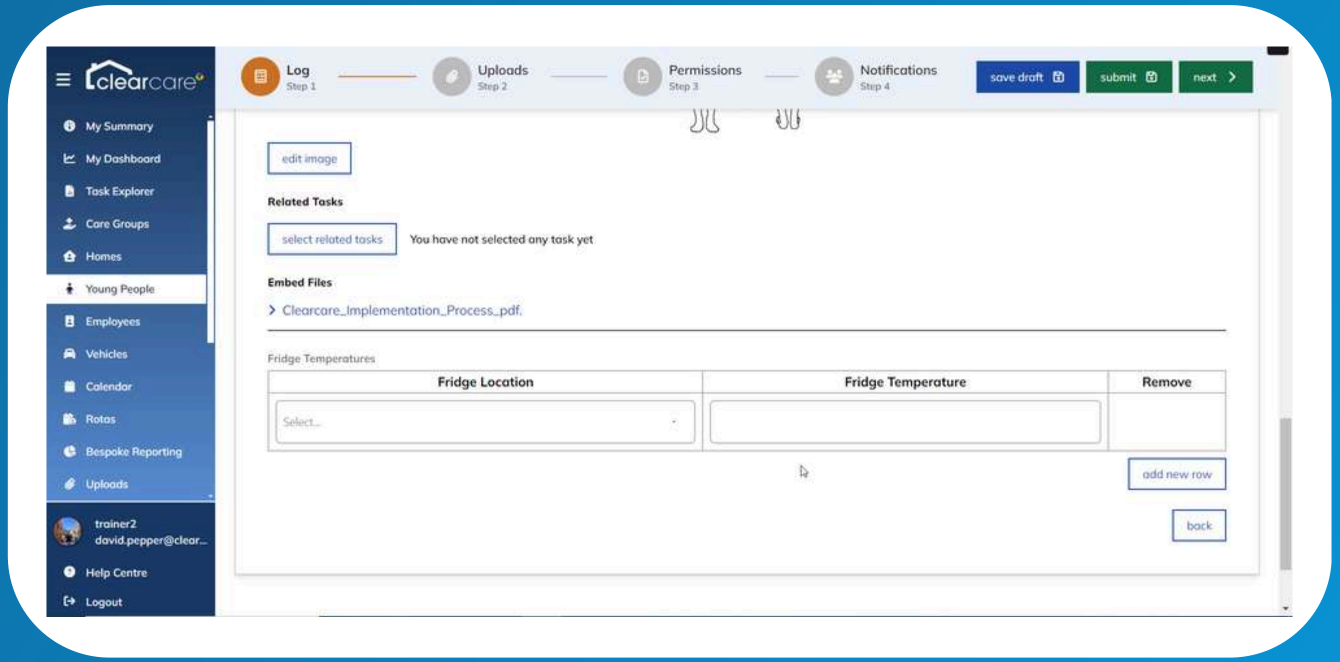
You can also update your signature at any time by clicking on your name in the bottom left corner of the screen in the "Manage User Profile" section of the site.



Embedded Files

This function allows your administrators to embed a file in each generated instance of this task form.

To assist you with the completion of this task, for example, your administrators could embed a file with guidance notes to help you document the event/record your data. Clicking the file will either open it in a separate window for you to view or download it to your desktop (depending on the file type).

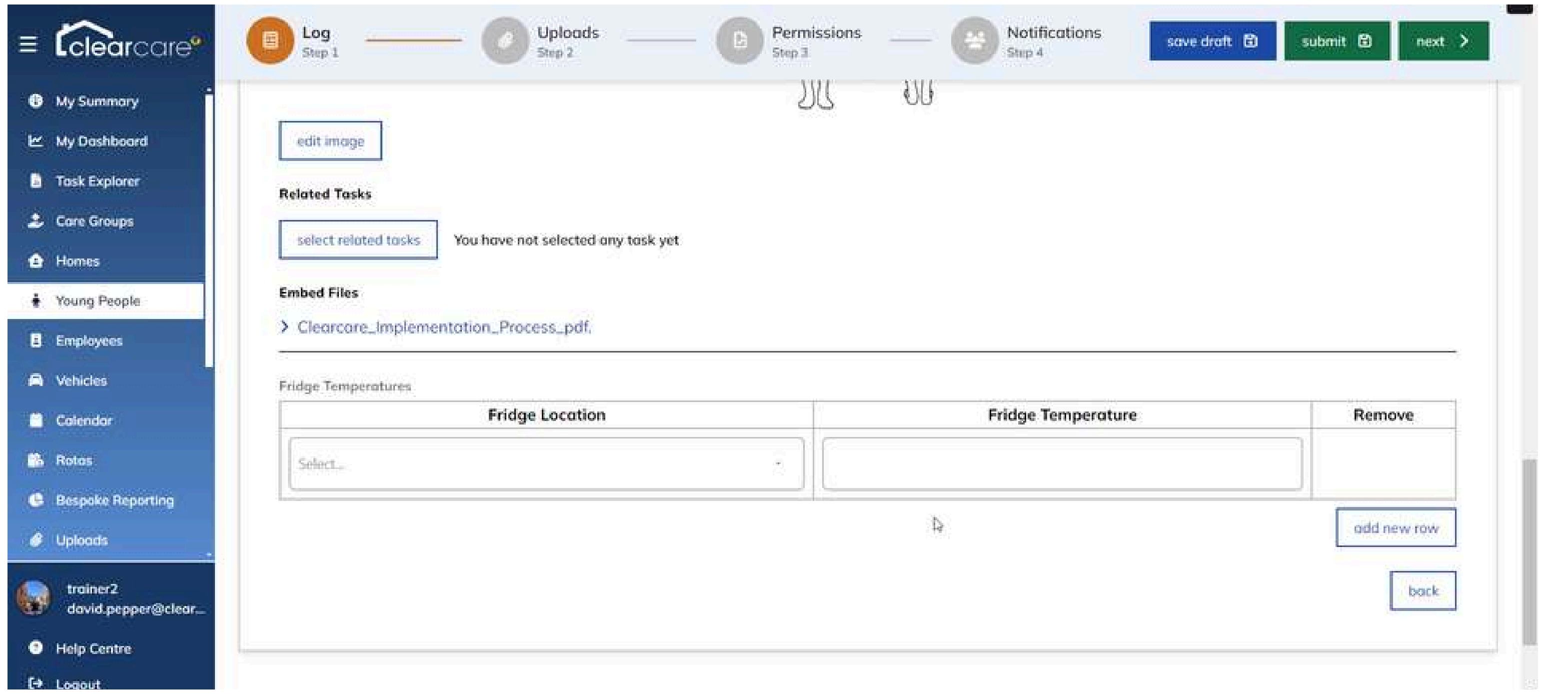


Tables

Some of the fields on your form may be grouped together to form a table. The table, upon generating the task, will only show one row of table cells.

Once the cells in this row have been completed, the table can be expanded to add a further row by selecting "Add Row".

You will be able to repeat this process to complete the table for as many rows as are required to document this particular event.



Configuring Your Dashboard Widgets

Your Dashboard screen can show you real-time data from various projects and task forms throughout your site. The data each user wishes to see in this section will be different, so this has been made fully configurable to allow each user to display the information they need in the format they need to see it.

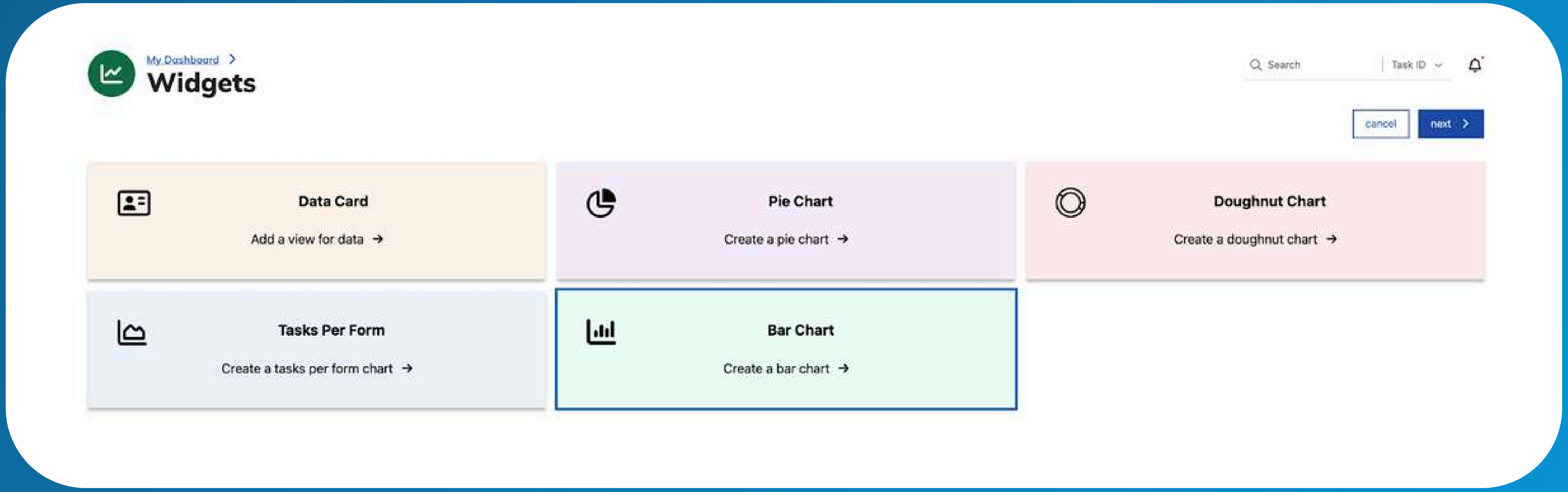
You can place both Data Card Widgets and Graph Widgets displaying chosen information to your Dashboard screen. To begin configuring this display, visit the Dashboard module and click the blank box marked +Add Widget.

This will take you to the Widget Builder where you can begin to configure the information you would like to see on screen.

Graph Widgets

Once you are in the Widget Builder, choose the format in which you'd like your data to be displayed and click Next.

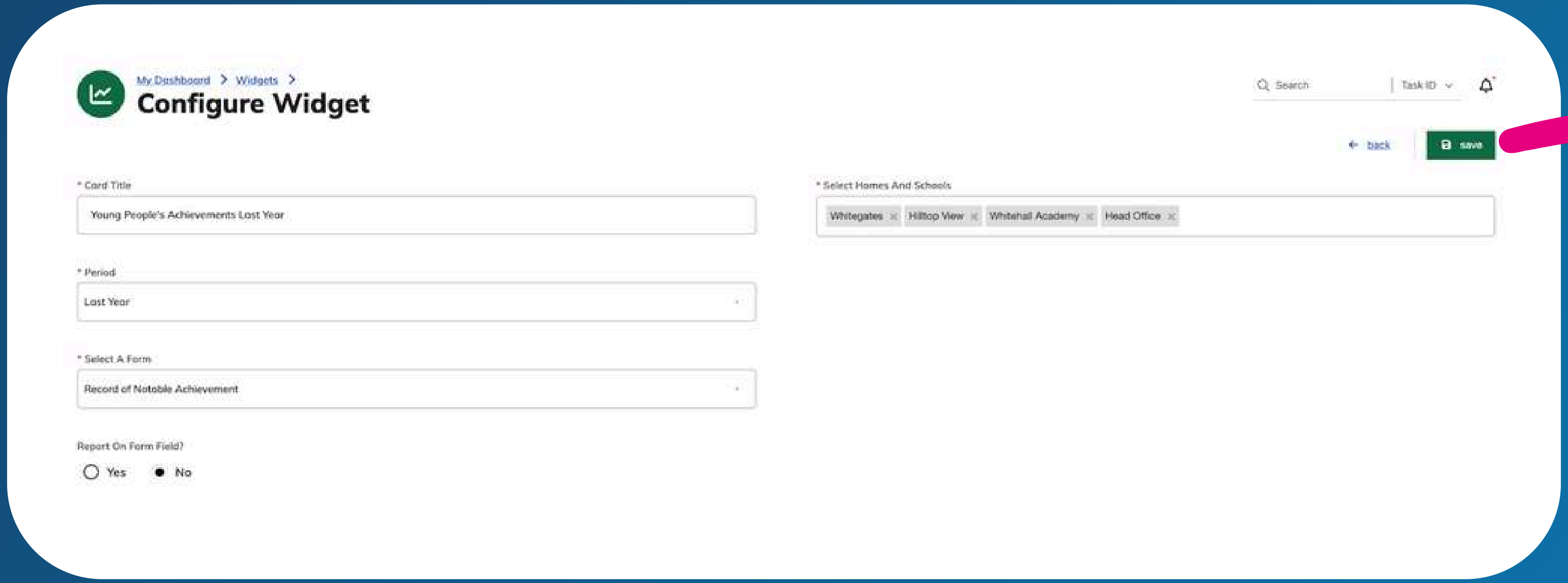
Here, for example. we're choosing a graph widget, specifically a Bar Chart.

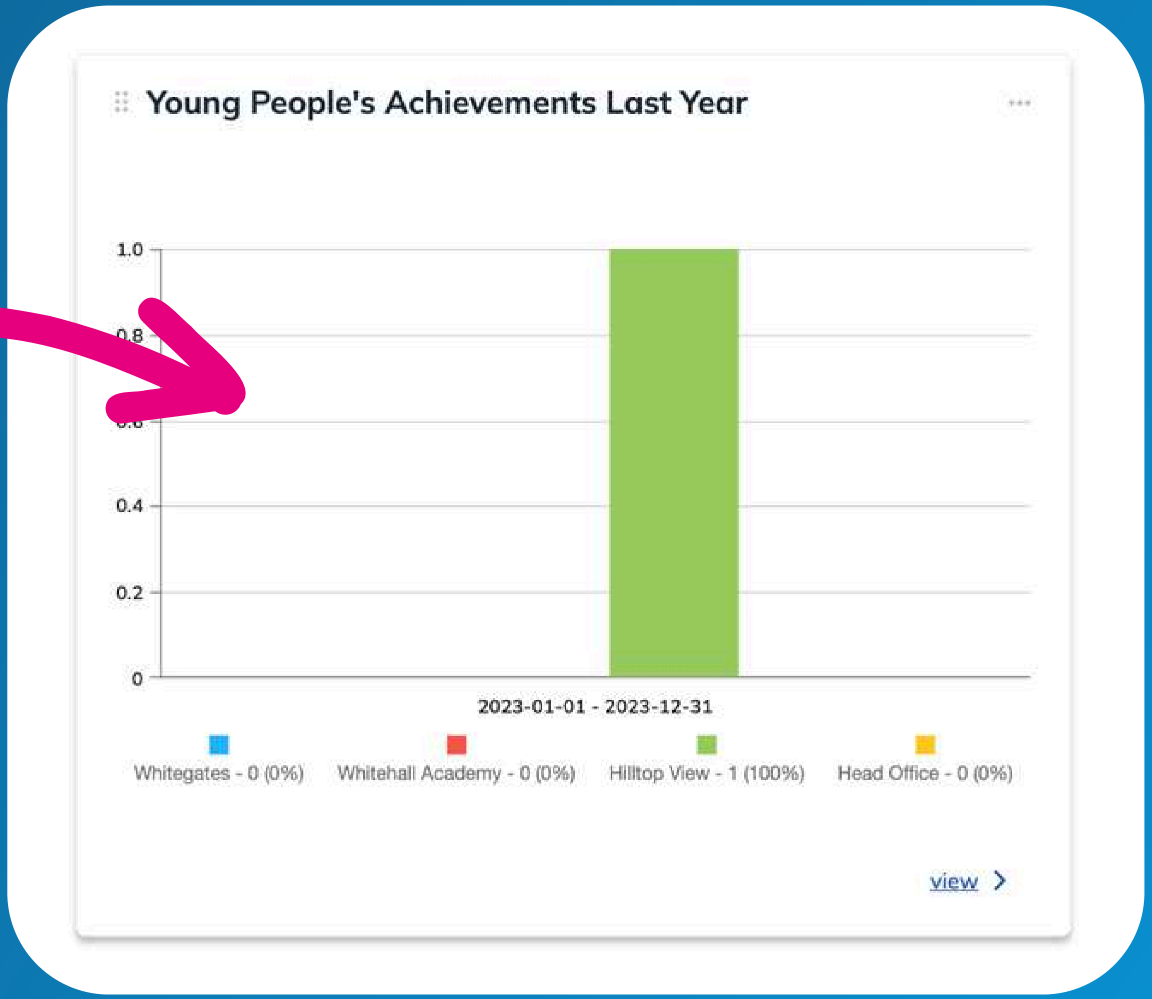


Graph Widgets (cont.)

Then, select a name for your widget and choose its data parameters. For example, here we are creating a widget for Record of Notable Achievement forms logged across all care settings last year.

When you're happy, click Save. and your new widget will automatically appear in your Dashboard module, tracking your chosen data in real-time.





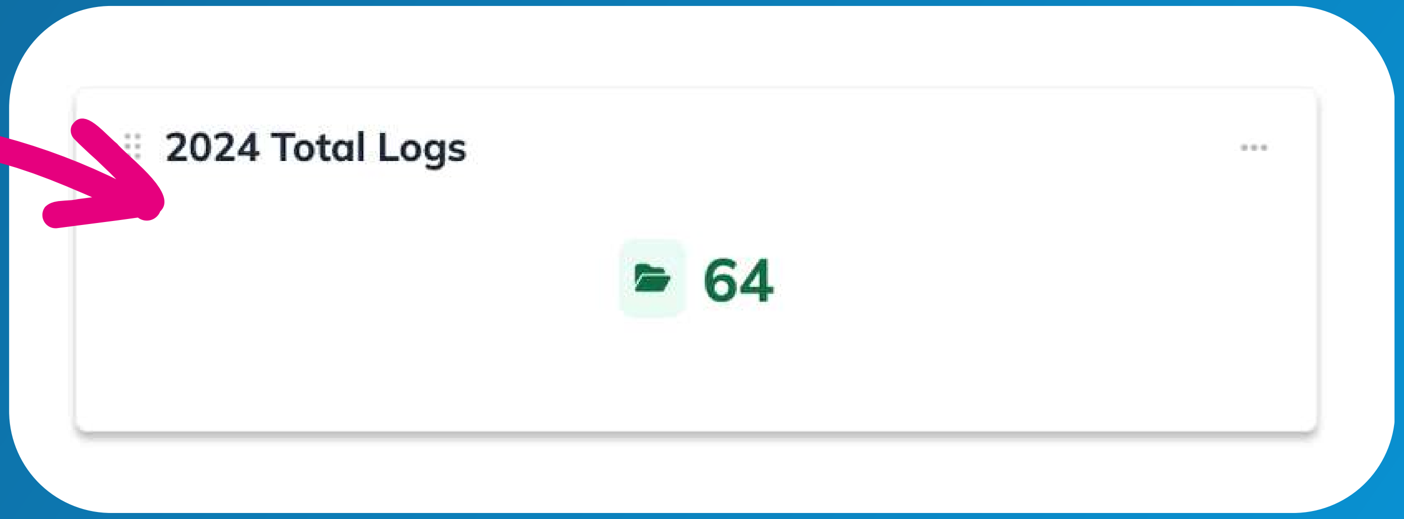
Data Card Widgets

Data card widgets don't track the same data, but they keep a running count of certain metrics such as the number of tasks generated, active projects, logs created, forms in use etc. across a certain period of time.

The process begins with the Widget Builder in the same way as before. The only difference is this time we are selecting a Data Card from the menu.

In the configuration screen, choose a name for your data card, followed by your desired time period and what you'd like to keep track of. In this case, we want a data card to show total logs submitted in 2024.

When you're happy, click Save, and your new data card will automatically appear in your Dashboard module, tracking your chosen data in real-time.



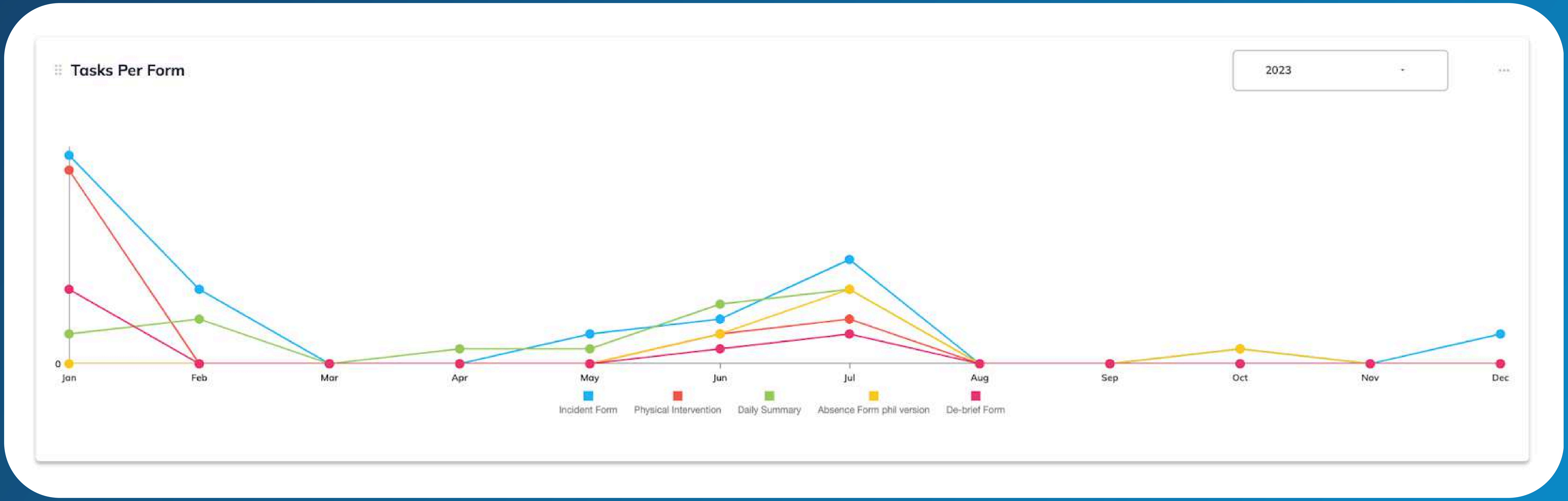
"Tasks Per Form" Graph Widget

The Tasks Per Form Graph will display the 5 form types with the highest number of generated tasks.

To add the Tasks Per Form Graph Widget to the Dashboard screen, start from the Widget Builder, and select the Tasks Per Form option.

Selecting the Finish button will save your choices.

The selections you have made will now all display real-time data on your configured Dashboard screen.



Further Support

We provide a dedicated in-house support team, who are here to help if you need us. We don't use robots at Clearcare, and we'll never make you fight with automated systems that don't help. Just get in touch, and a real person will come back to you.

1. Visit our Help Centre

The best way to get help is to visit our Help Centre. You can read up on our many independent articles, downloadable guides and videos, or get help from one of the team.

https://clearcaresolutions.zendesk.com/hc/en-us

2. Email Us

Prefer to email us? We closely monitor all emails, drop us a message and we'll get back to you as soon as possible.

Email: support@clearcaresolutions.co.uk

3. Call Us

We operate a callback system, simply call the below and leave us a voicemail after the beep, letting us know your name, company and issues. We'll send you a text confirmation of your callback request.

Call: 01785 335 525