Agilisys

NLC Home Care Field Services Guide

For Support Officers and Home Support Workers

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Version: 0.1

Contents

1 Introduction to this document

This user guide has been developed to support NLC staff manage and administer Home Care services in Dynamics.

1.1 Conventions used in this document.

This manual uses icons to illustrate comments with the following purposes:

- △ Warning
- ⓘ Useful tips
- ✓ Best Practice
- ➔ Navigate to

[***] On screen button, for example, Select **[Next]**.

1.2 Objectives

This user guide describes how the Support Officers and Home Support Workers will use Dynamics Field Services to process and manage home care appointments.

2 About Field Services

All Home Care appointments are schedules and logged within Microsoft Dynamics Field Services. This section explains the terms and relationships that are used in Field Services.

2.1 Using Field Services in Home Care

Field Services is a sophisticated tool that allows organisations to manage services where staff need to attend appointments out 'in the field' and there are equipment or facilities that need to be booked.

Field Services provides support for Home Support Workers, Support Officers and Service Coordinators.

Field Service has a huge range of features. For Home Care you'll only need to use a small portion of these, which are covered in this guide.

Primarily you'll be able to use Field Services for the following:

- Keeping up-to-date information on service users that is required to provide good quality home care to them
- Keeping up-to-date information on Home Support Workers such as working hours, skills and other attributes
- Booking and rescheduling visits for service users
- Viewing your schedule of visits, and logging completion of them
- Sending text and email updates on appointments to service users

2.2 Glossary

Field Services uses a variety of terms that you may not be familiar with, to describe the elements of the service being managed that you call other names. Below is a glossary of terms that are used in Field Services.

Bookable resources – the resources that are booked for appointments, either operatives or equipment. In this case these are Home Support Workers (HSWs)

Service users – these are essentially the customers for whom appointments are being made

Characteristics – attributes associated with a bookable resource or a service user. This includes skills (e.g. medication supervision training), or other types of attributes such a phobia or lifts or allergies to pets that might prevent a bookable resource from certain types of visit (classed as specific type of characteristic - '**Restrictions**' - in Field Service)

Preferences – this refers to the preferences of a service user – either **for** a specific HSW, or to **not have** a specific HSW visit them

Agreements – this essentially the home care plan for a service user. It sets out a schedule of visits (including the tasks that will be done as part of that visit) for a set period of time

Work orders – this is a visit within the care plan for a service user, which needs to be booked

Bookings – a booked work order i.e. an appointment

Booking setups – these are the schedule(s) of visits that form part of a care plan. Booking agreements record the tasks to be completed in a visit, timings and frequency of visits, and if known, the 'permanent' HSWs to carry them out. There can be several booking setups for any one agreement

Preferred resource – the equivalent to 'Permanent worker' in mySWIS. In booking setups, if you want Field Service to automatically book a visit in advance you must select a person to book it with. This is referred to as a 'preferred resource' – you will find this field in the booking setup form

Preferred time - in booking setups, if you want Field Service to automatically book a visit in advance you must select a time to book it. This is referred to as 'preferred time' – you will find this field in the booking setup form

Business units – organisational units that are stored in Field Services. There is a dedicated unit called Home Care. This is important because it differentiates from other types of workers and resources that use the system, and makes sure bookings aren't inadvertently made with the wrong worker (e.g. a Pest Control Officer)

Territory – a geographical area, essentially equivalent to a 'patch' or 'locality'. By defining service users and HSWs as being in a territory this allows field services to determine who is 'allowed' to make a visit or what team is responsible for that visit overall

2.3 How Field Services works

Field Services essentially takes information about the service user, the type of visit and Home Support Workers to find the most suitable match. It relies on having as much information on all three of these entities as possible, combined with a set of defined rules for matching up.

The diagram below shows roughly the relationship between the different types of information and how it is used by field services to match people up.

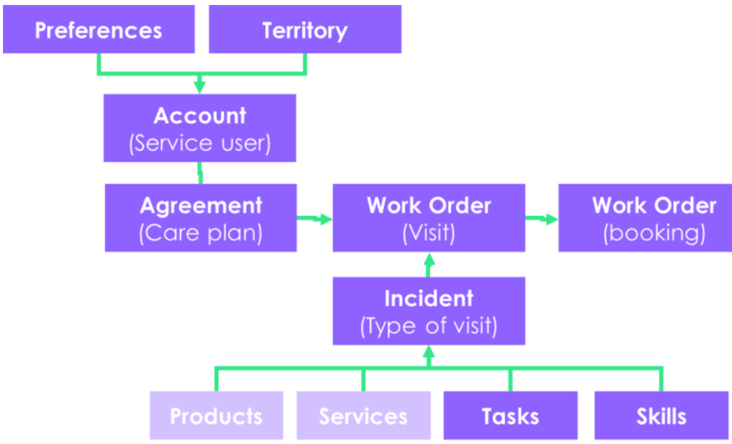

Figure 1. An 'entity relationship diagram' for Field Services. It sets out how the key fields that are recorded against service users, HSWs and work orders link together to help Field Services make bookings.

This means that Field Services will only be as good as the information recorded on each service user, task/visit and HSW. Therefore it is important to make sure all the relevant details are recorded in the system.

ⓘ You will still need to use mySWIS for certain Home Care activities – see appendix 6.1 for guidance on which system to use during the pilot.

3 Using Field Services as a Support Officer

This section explains how a Support Officer can use Field Services to set up new HSWs, edit SU preferences, book appointments and complete other tasks.

3.1 Logging in

Logging into Field Services is very similar to any other Office365 applications that you currently use.

1. Navigate to nlc.crm11.dynamics.com/
2. You will be presented with a Microsoft Dynamics log in page

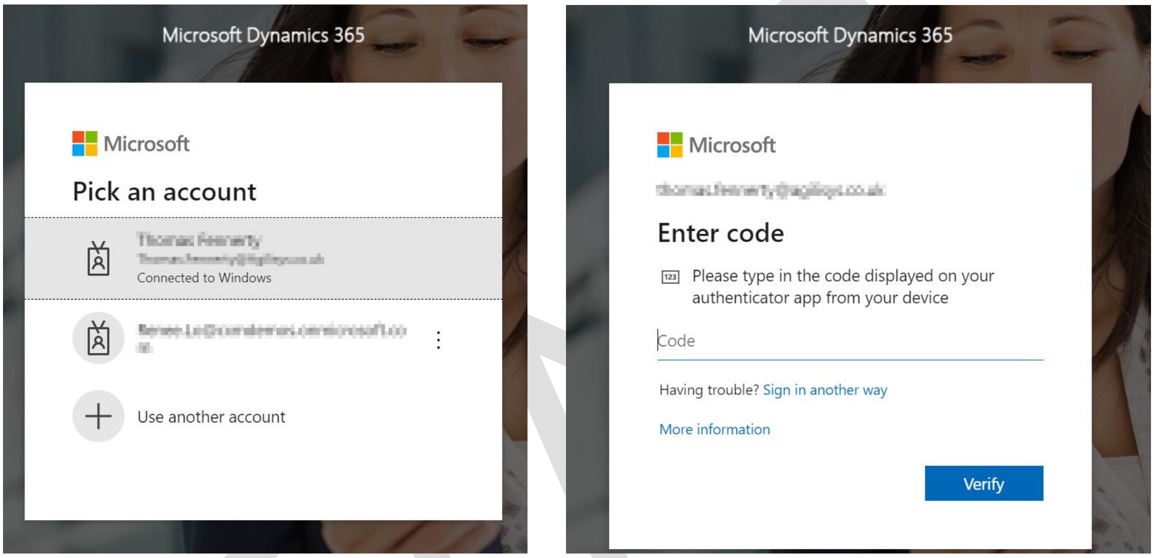

Figure 2. The log in page presented when you navigate to Dynamic Field Services, and the prompt you may get if 2-factor authentication is required.

3. Depending on whether you are already logged into Office365 you may be asked to enter your password
4. You may also be asked to enter a code from the Microsoft Authenticator app as part of multi-factor authentication
5. Once you've provided these details Dynamics will navigate you to the Field Services home page

✓ Once you are into the home page you can bookmark it in your web browser for quick and easy access

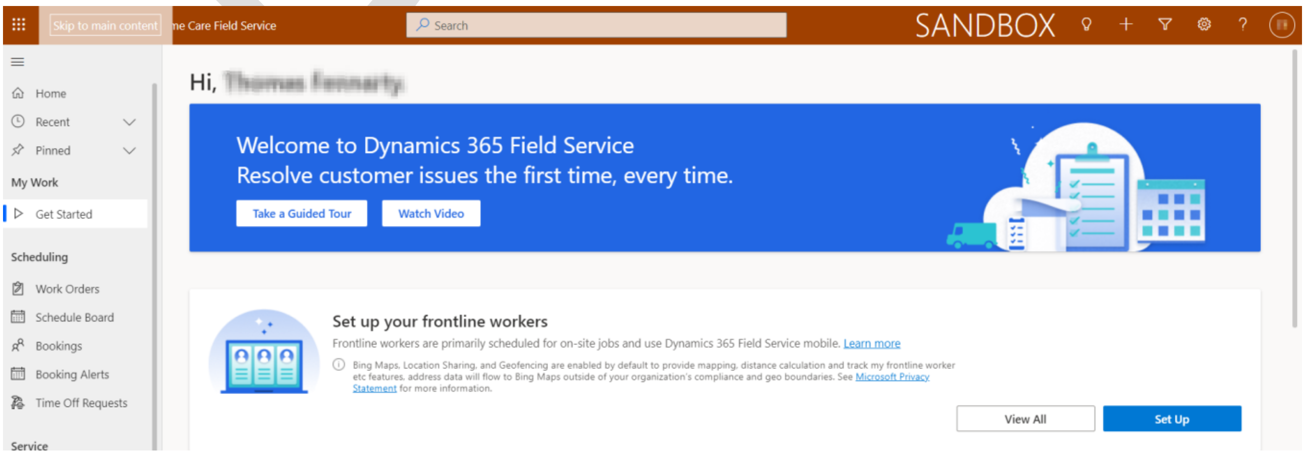

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Figure 3. The home page that will open once you have logged in.

3.2 App selection

1. Click 'Dynamics365' to display a list of available Apps and select as required
2. Select the 'Home Care Field Service' app (highlighted in the green box in the screenshot below)

ⓘ For this document we will focus on the NLC Home Care Field Service app.

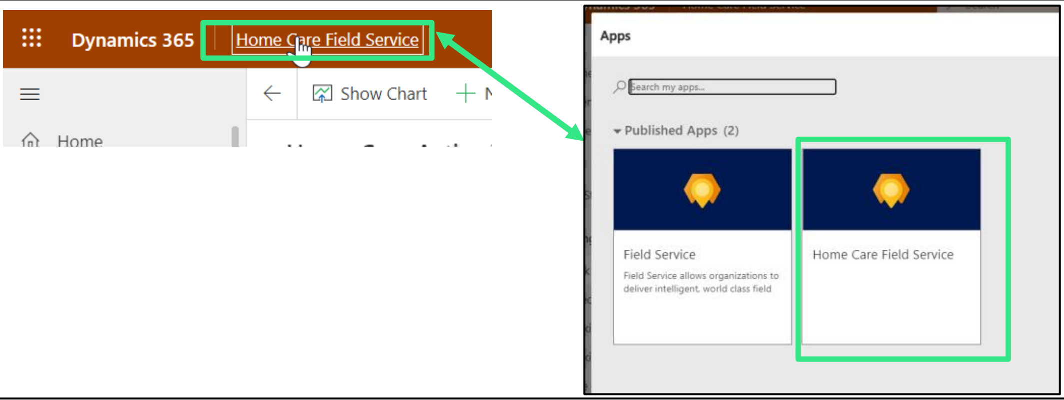
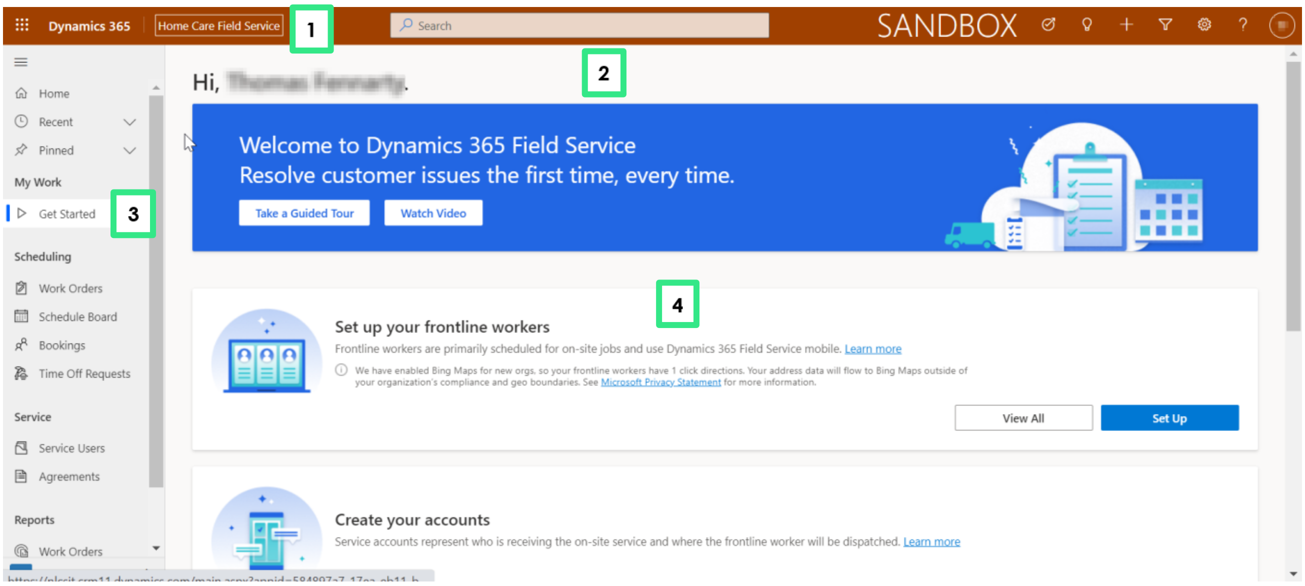


Figure 4. App selection within Dynamics – the Home Care Field Service app is highlighted here.

3.3 Home page



1. Dynamics 365 – App selection
2. Toolbar – Adaptive to selected views and process steps
3. Site Map – which allows you to navigate between different areas within Field Services. It contains the following:
   - Sections – Resource, Service, and Training – these are the areas that you will need to access to manage the service

- Pages – a link to pages within each section to access specific elements of the service (e.g. Schedule board, Service users, agreements)

4. Main work area, where you are able to carry out the main tasks within Field Services. You'll be able to access the following:
   - Schedule board
   - Accounts (SUs)
   - Agreements (Care plans)
   - Bookable resources (HSWs)

3.4 Home, Recent and Pinned

There are some other functions in the sitemap that you can use to help you quickly navigate around Field Service.

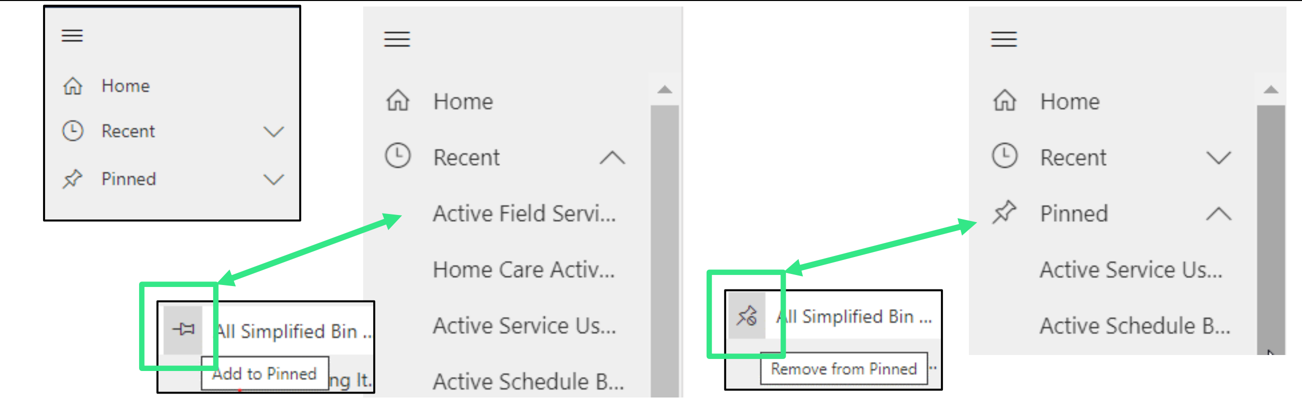


Figure 5. Screenshots of the useful navigation tools within the sitemap.

Set Menu (Burger) – expand/collapse the side menu

Home – Returns a user to the default page of 'Applications' within the Waste Services App

Recent – Expand to view 10 recently accessed pages. Pin and remove pinned pages.

Pinned – List of pinned pages (Max 10). Pinned items can also be removed here.

3.5 Resources and Service views

The two views you will need to use are shown below.

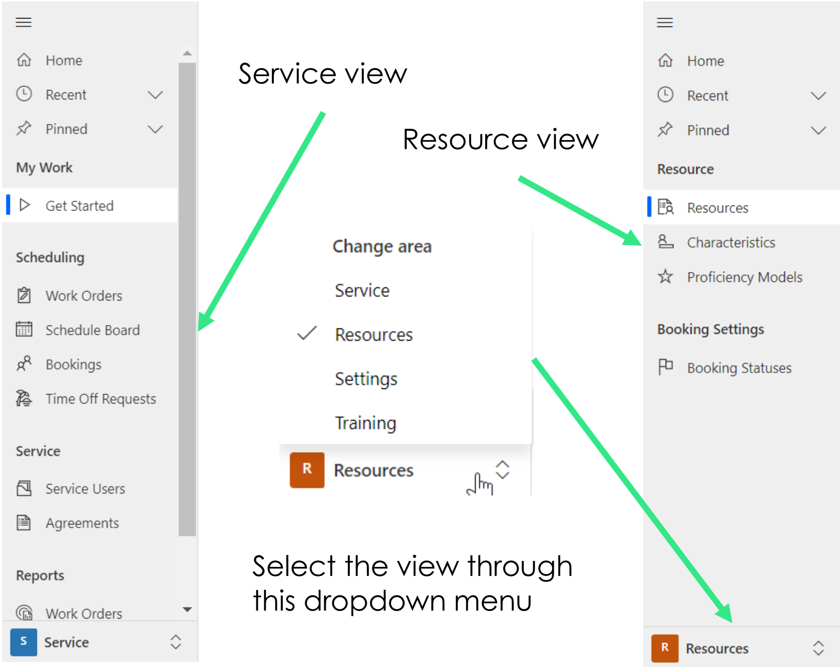


Figure 6. Selecting the view that you want through the menu in the bottom left-hand corner of the window.

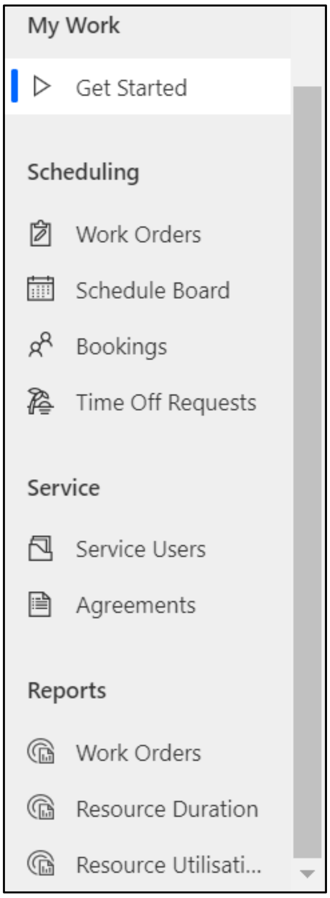
The main areas that you will use in Field Services can be accessed through the Resources and Service views.

ⓘ Once you've selected the view, you can navigate to the relevant section by clicking on the option in the menu on the left-hand side of the screen.

ⓘ You can open up multiple tabs in the browser for each view that you use most frequently - so that you have quick access to them

3.5.1 Service

The service view is where you are able to carry out tasks for managing service users and scheduling appointments.



My Work

Get Started – the default home page. It includes some quick links to the most common types of tasks and guidance and support resources

Scheduling

Work Orders – a page listing all active work orders

Schedule Board – the page that includes a board showing a diary of all the appointments, a list of un-booked work orders and alerts related to bookings. This is where you can schedule and re-schedule appointments

Bookings – a page list all scheduled appointments

Time-off requests – this is a standard view in Field Services but is not used here

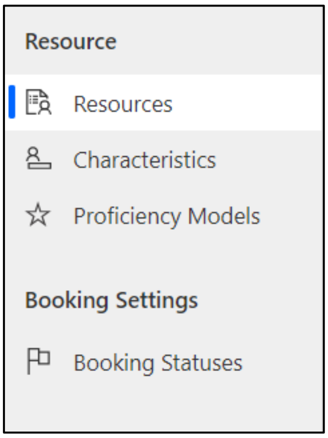
Service

Service Users – a page listing all the service users that have been recorded in Field Services

Agreements – a page listing all the agreements that have been set up in Field Services

3.5.2 Resources

The Resources view is where you are able to carry out the tasks for managing HSWs that carry out visits.



There are a few options in the Resources view, however the only one that you will need to use is the Resources page. This presents a list of 'bookable resources' that have been set up in Field Services.

3.6 Filter and Search

When you select an area where a list (e.g. customer accounts, agreements, work orders, etc.) are listed you can filter and search for the right results.

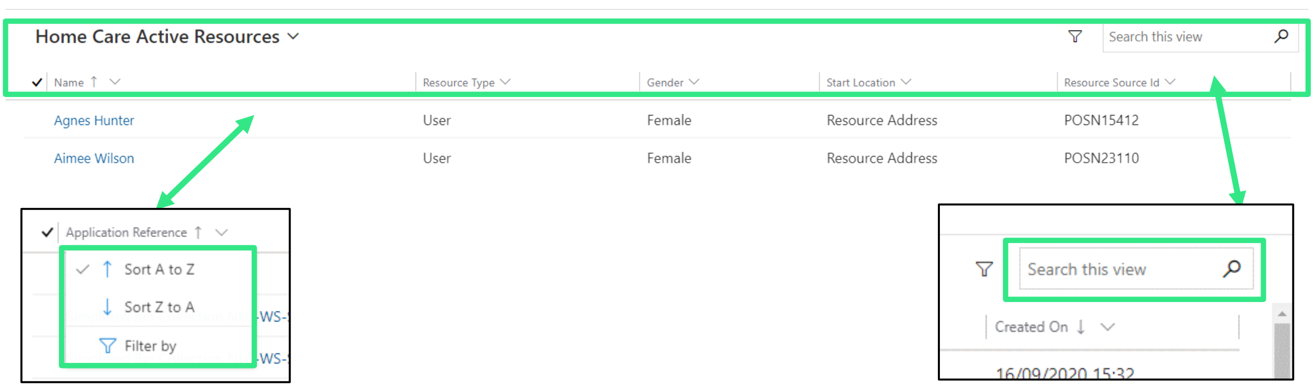


Figure 7. The sort and filter functions that are present in all lists within Field Service.

The results are separated into a series of columns, all of which can be sorted and filtered.

3.6.1 Column Sort and Filter

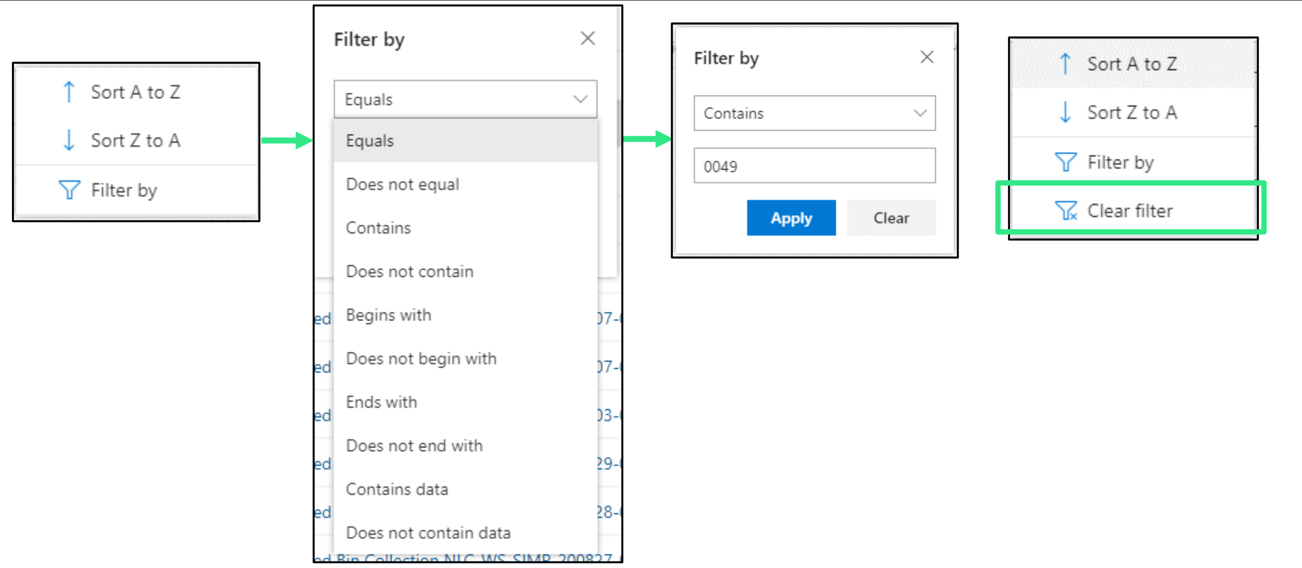


Figure 8. Using the column filter options within a list.

- Sort in ascending or descending order
- When Filtering, select an operator from the drop-list, then enter a value
- Once a value is entered [**Apply**] becomes active. Click to display filtered results.
- Return to the column filter to select 'Clear Filter' when no longer required

ⓘ Some columns have limited values which can be selected from a list, for example, the 'Status' column. Columns that refer to dates will present a calendar to select from, see images below.

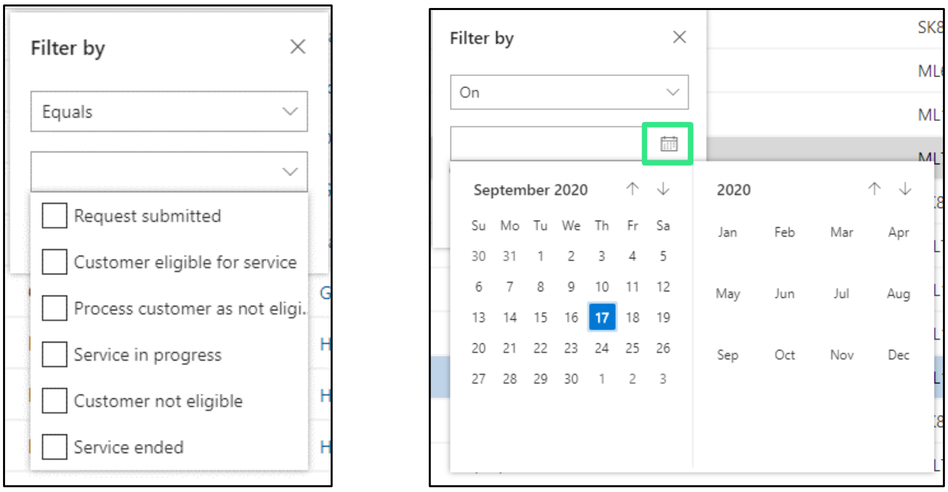


Figure 9. Using the filter functions to filter by status, and by date.

3.6.2 Search

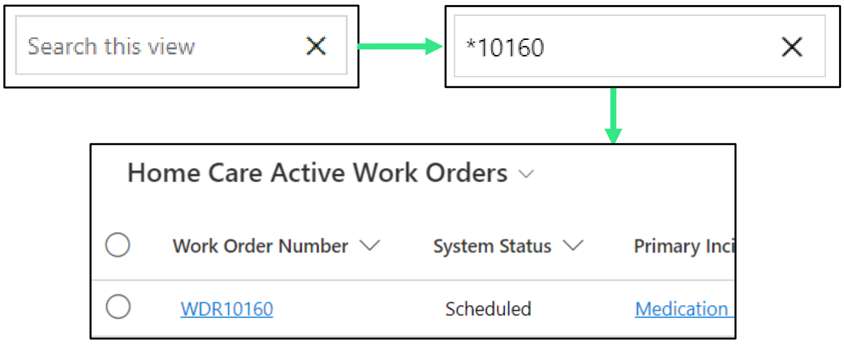


Figure 10. Using the search wildcard option to find specific records.

- The Search field can also be used to locate specific agreement, work order or booking records.
- Wildcard - Insert an asterisk * at the start of an application reference number and search to return results. See above example.

ⓘ Access to view documents will be restricted to relevant roles

3.7 Set up a new HSW

A HSW must be set up as a bookable resource in Field Services before you can schedule appointments for them.

You can set up a new HSW through the Resources page.

△ Before the new HSW can be set up they must be assigned a Microsoft Dynamics 'Team Member' license

1. Navigate to the Resources page in the Resources view
2. Select the **[+ New]** option in the toolbar – this will open a New Bookable Resource form

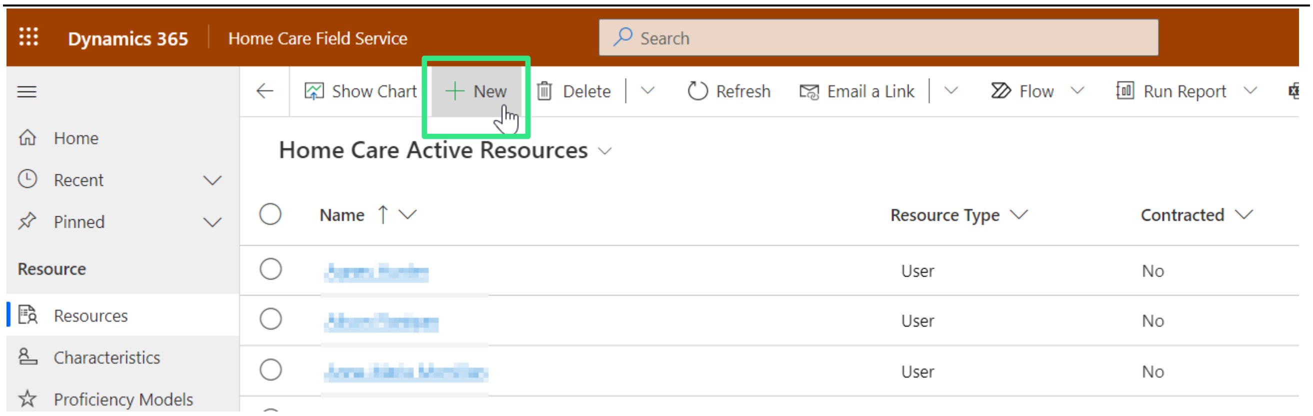


Figure 11. The [+ New] button to create a new 'bookable resource' in the Resources page.

3. Complete all unpopulated fields (those already populated should be correct) in the General tab of the form. The table below provides guidance on how to complete these.

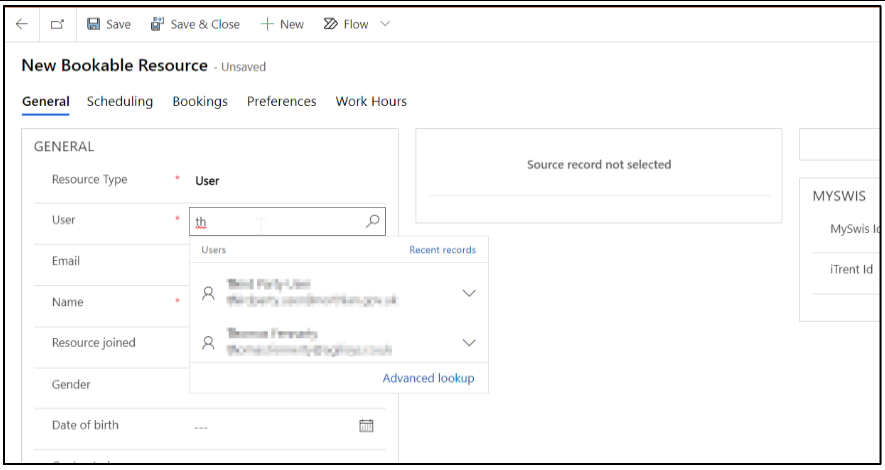


Figure 12. The 'General' tab in a blank form to create a new bookable resource record. In this image you can see that starting to type the username in will generate a list of options.

Field	Guidance
Resource type	This is already set to the correct value (User)

User	Start typing the HSW name and, provided they have been set up with a license, their name will appear in a drop-down list. Select their name from the list ⚠ You must pick the correct name off the list. If the name doesn't exist then you should contact IT support as they may not have been assigned a licence
Name	Type a preferred name (this is what will appear on the schedule board)
Resource joined	Enter the date that the HSW joined, by clicking the calendar icon and navigating through the to the date
Gender	Select either Male or Female from the dropdown menu ⓘ This can be used by field services to match appropriate HSWs to service users with gender preferences
Date of birth	Enter the date of birth for the HSW, by clicking the calendar icon and navigating through the to the date
Time zone	This is already pre-set to the correct value
mySWIS ID	The unique identifier for the HSW in mySWIS (will already be populated with mySWIS integration)
iTrent ID	The employee number for the HSW in iTrent (may already be populated with iTrent integration) ⚠ You must provide the employee number because field service uses this to update HSW absence from iTrent – this unique identifier is used for matching

4. Navigate to the **[Schedule]** tab. Complete all the fields – guidance on how to complete each field is set out in the table below.

Field	**Guidance**
Start location	This should be preset to the correct value (Location Agnostic)
End location	This should be preset to the correct value (Location Agnostic)
Organisational unit	Start typing in 'Home Care' and a drop-down list will display this as an option. Select this option. Alternatively select the magnifying glass to open the drop-down list.
Mode of Transport	Field Services calculates the travel time to appointments, and this is based upon whether the HSW is driving or on foot.

	If the HSW uses a car then select Driving from the drop-down. If they are travelling by foot then select Walking.
Display on Schedule Board	This should be pre-set to Yes – as this will automatically display the new HSW on the schedule board so that you can see their appointments and availability
Enable for Availability Search	This should be pre-set to Yes

5. Navigate to the 'Working hours' tab – you will be presented with a calendar
6. Select a day for which you'd like start adding the work hours of the resource
7. Select the **[+ New]** button at the top of the calendar and pick the Working hours option – this will open up a window on the right-hand side of the screen

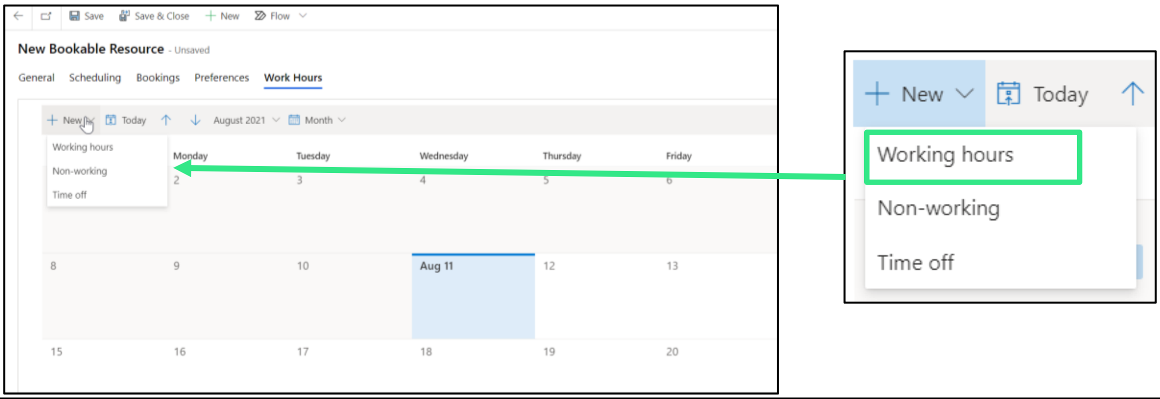


Figure 13. The calendar view within the new bookable resource form. This screenshot shows the options presented when you select the [+ New] button.

8. Complete the fields in this window. The table below provides guidance on how to complete this.

ⓘ If you need to add multi-week shifts for a HSW please contact the admin team and they will be able to add this type of working pattern for you

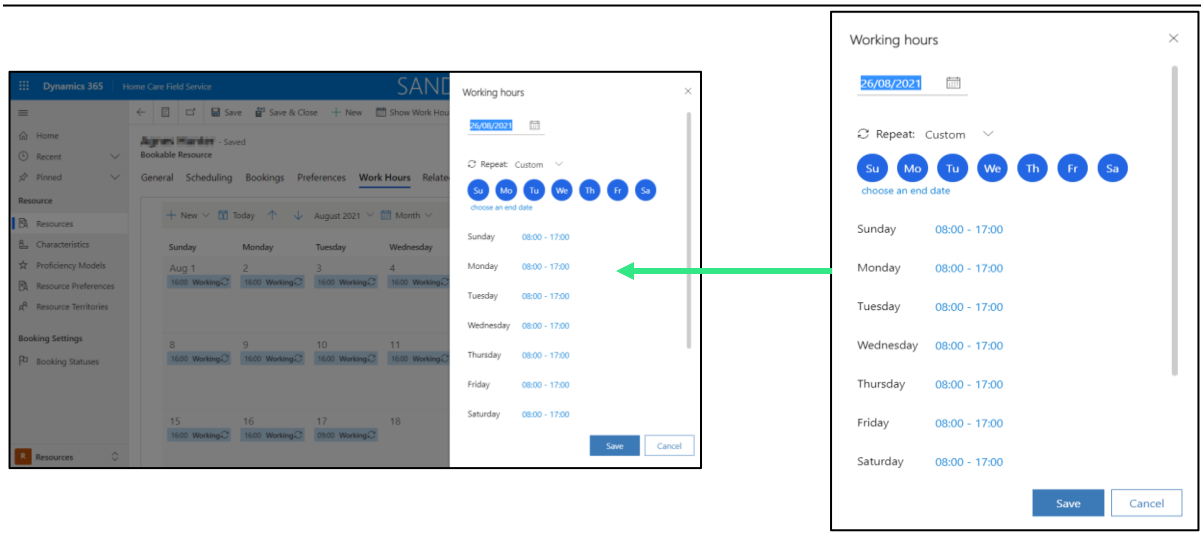


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Figure 14. The side window for entering new work hours. This screenshot shows what is presented when the 'custom' option is selected.

Field	Guidance
'All Day' toggle	This should be left switched off
'Capacity' toggle	This should be left switched off
Date and calendar icon	Select the start date for which you want to start working hours
Repeat	There are a range of different options in the drop-down list: • **Never** – select this if you want to add just working hours for a single day • **Every day** – select this if you want to add working hours for every single day • **Every week** – select if you want to add a weekly pattern of working hours that are the same for each working day of the week (e.g. 9-5pm, every Monday to Friday each week • **Custom** – select this if you want to put a range of different hours for each day in a working week (e.g. 12-9pm Mondays and Tuesday but 9-3pm Wednesdays and Thursdays)
Hours	The options for hours you can input will depend upon the repeat option chosen **For 'Never'** just enter the hours, or select from the drop-down list, in the two fields for start and finish hours. **For 'every day'** you just set the working hours in the field below the row of days. If you de-select days (by selecting them – they will turn grey), the form will switch to the 'every week' view automatically. **For 'every week'** you can select the days of the week to include in working hours, but the hours for each day must be the same. Select each day to add or remove it from your custom working pattern (blue is in, grey is out). Sets the working hours in the fields that appear below the row of days. **For 'custom'** you can select the days of the week and specify different hours for each day. Select each day to add or remove it from your custom working pattern (blue is in, grey is out). Set the hours for each day in the list that appears below the row of days. **You can also add breaks to a working hour schedule** by clicking the vertical ellipses ('⋮'). This will split a shift into two. The morning hours, break time, and afternoon hours can all be edited using the fields presented as part of this.
Time zone	Should be set to 'GMT +00:00'. This shouldn't be changed

ⓘ The standard Field Service solution doesn't include the ability to record multi-week shift patterns directly – however these can be added by importing the data from an existing excel file. Please talk to a system administrator for support to do this.

9. Select **[Save]** at the bottom of the widow
10. Select **[Save and Close]** from the toolbar. This will complete the setup of the new HSW

3.8 Edit the characteristics of a HSW

You can change the properties of a HSW to reflect any changes to their skills, working hours or other attributes.

Making changes to a HSW's characteristics is also done through the Resources page in the Resource view.

3.8.1 Change HSW characteristics

You can change the skills and preferences for a HSW using the following steps:

1. Navigate to the Resources page in the Resources view
2. Search the list of resources to find the HSW record that you want to edit (see section 3.6 for guidance on how to search) and select the name. This will open the HSW record
3. Go to the 'Characteristics' box on the front page of the record (located on the right-hand of the screen)

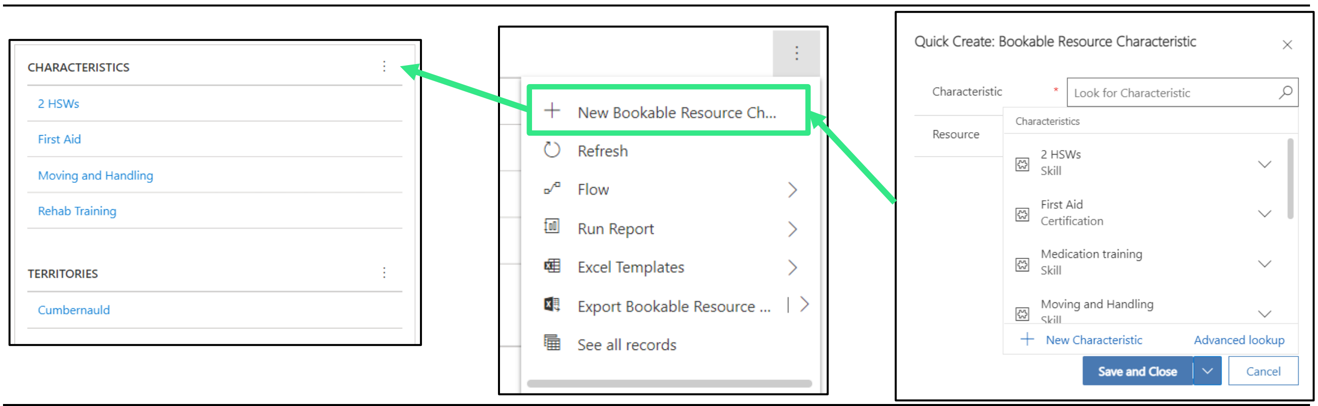


Figure 15. Adding a new characteristic in a HSW record. This screenshot shows the Characteristics box and menu presented when you select the ellipses – the [+ New Bookable Resource Characteristic] button

4. From here you can manage the characteristics for the HSW. The table below provides guidance on the types of changes you may want to make.

Change	Guide
Add a new characteristic	• Select the vertical ellipses (⁝) next to the 'Resource characteristics' heading and choose the '+ New bookable resource characteristic' • This will open a side window to create a new characteristic • In the 'Characteristic' field start typing the name of the characteristic you want to add – options will appear in a dropdown list • Select the relevant option • The 'Resource' field should already be pre-populated with the name of the HSW – do not change it • Select the 'Save and close' button at the bottom of this window
Remove a characteristic	• The list of characteristics against a HSW will appear under the 'Resource characteristics' heading • Select the vertical ellipses (⁝) next to the characteristic you want to delete

	• A menu should appear – select the 'Delete bookable resource characteristic' option

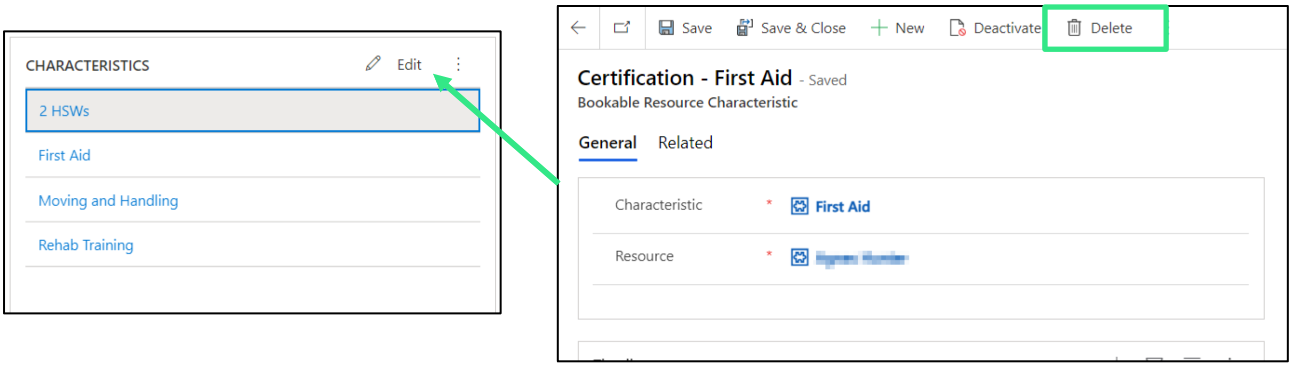


Figure 16. Adding a new characteristic in a HSW record. This screenshot shows the Characteristics box and menu presented when you select the ellipses – the [+ New Bookable Resource Characteristic] button

5. Select **[Save and close]** in the toolbar to make sure the record is updated.

3.8.2 Set characteristics that limit SUs that a HSW can visit

Field Services has been configured so that you can take into account some other specific factors that might stop you from booking an appointment for a SU with a specific HSW. These are:

- Where the SU only wants a HSW of a certain gender to make visits
- Where a HSW has either a pet allergy or a phobia of lifts – in these instances you would want to avoid pairing them up with either a SU that has pets, or lives at the top of a high-rise building

To make use of this you need to make sure the relevant details are recorded against both SUs and HSWs where they apply. This section shows how to record these against the HSW:

1. Navigate to the Resources view, then the Resources page
2. Search for, and select the HSW that you want to record details – this will open the record
3. Navigate to the 'Scheduling' tab
4. To set the gender of the HSW select either 'Male' or 'Female' from the dropdown menu in the 'Gender' field
5. If you want to record that the HSW has a pet allergy or phobia of lifts then select the 'SU characteristics' field – this will present a dropdown menu with options 'Pets' an 'Lifts' – select the one that applies

△ You should not select both restrictions as Field Service Scheduling Assistant will be unable to match correctly

6. Select **[Save & close]** to save your changes

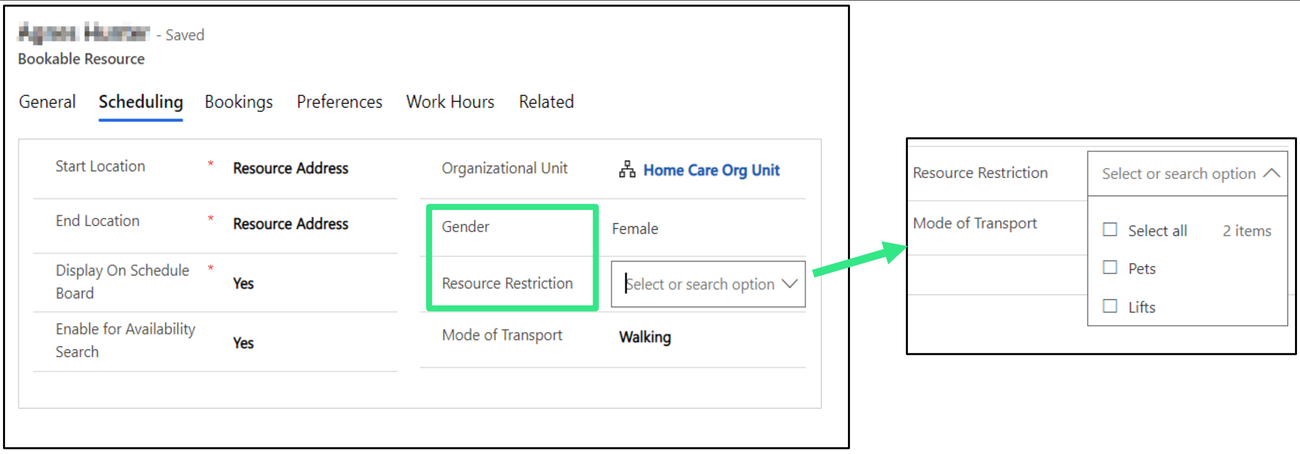


Figure 17. Selecting gender and resource restrictions that limit the types of SU that a HSW is able to visit.

3.8.3 Change working hours

You can change the working hours for a HSW using the following steps:

1. Navigate to the Resources page in the Resources view
2. Search the list of resources to find the HSW record that you want to edit (see section 3.6 for guidance on how to search) and select the name. This will open the HSW record
3. Go to the 'Working hours' tab at the top of the record (located just below the toolbar)
4. Select the working hours that you want to change in the calendar below – a dialogue box will appear

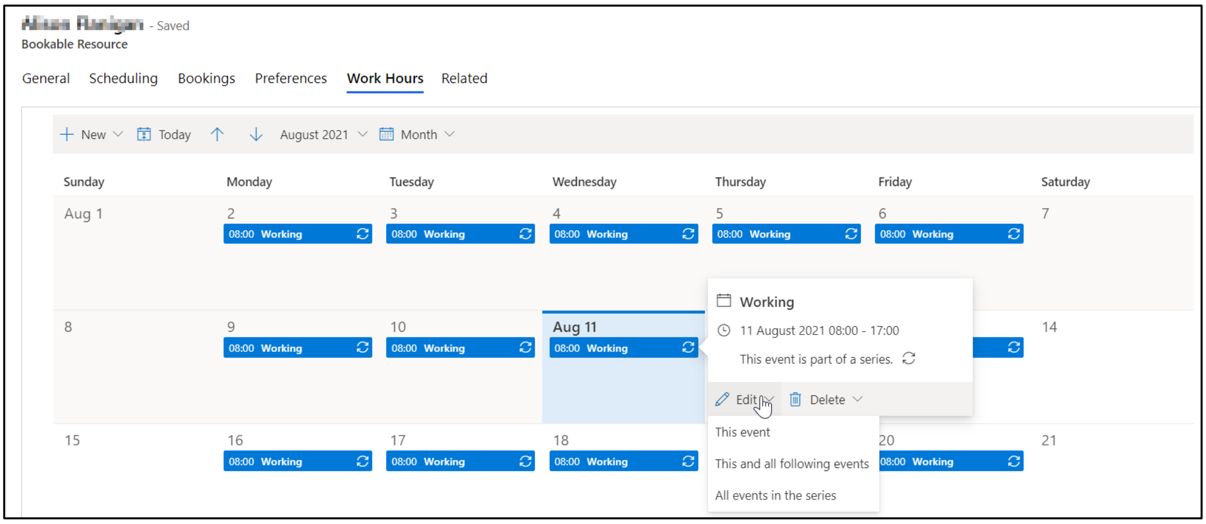


Figure 18. The working hours tab through which you can change working hours. This screenshot shows the menu that is presented when you select a date for which you want to change the working hours.

5. Select the 'Edit' option - a dropdown menu will appear – or 'Delete'. Guidance on each option is provided in the table below.

Option	**Guidance**

Delete	Selecting delete will allow you to delete the hours for that day It will generate a prompt to confirm that you wish to do this
This event	Use this option to make a one-off change for one day (e.g. the HSW is taking a half a day off) Change the hours using the fields under the date/calendar icon
This and all following events	Use this option if you want to change multiple days – either a set period or a permanent change You can either choose whether to repeat the changes: • **Every day** – applies your changes to all days • **Every week** – allows you to apply the same change to specific days in the week • **Custom** – allows you the flexibility to make different changes to every day in the week If you have a specific date you want the limit the changes to then you will need to choose an end date (displayed below repeat and days option). You can make changes using the same approach as you would for setting up working hours for a new HSW (see section Set up a new HSW3.7)
All events in the series	You can use this to make a permanent change, but it is no better than the option above

6. Select **[Save and close]**

The changes in working hours will be reflected in the availability for the HSW when you view the schedule board.

ⓘ If you want to record multi-week shift patterns (e.g. 'big weeks' and 'wee weeks' you can contact an administrator who will be able to add these for you

3.9 Adding overtime[1]

△ If you add overtime then you must add in a time entry (see instructions below)!

Where you have agreed with a HSW that they will work overtime you can update their working hours to reflect their extended availability. Currently you can do this by changing their working hours in the resource record (see 3.8.3 for instructions on how to do this) to cover the overtime **but you must also complete a time entry so that the overtime is recorded and included in payment calculations**.

You can add in a time entry to record overtime through the following steps:

[1] NOTE: This feature will be updated so that you will only need to complete time entry – this will then update the HSW calendar automatically

1. Go into service view and select the ‘Time entry’ page – this will present you with a list of all the time entries recorded
2. To create a new one, select the **[+ New]** to add a new overtime record

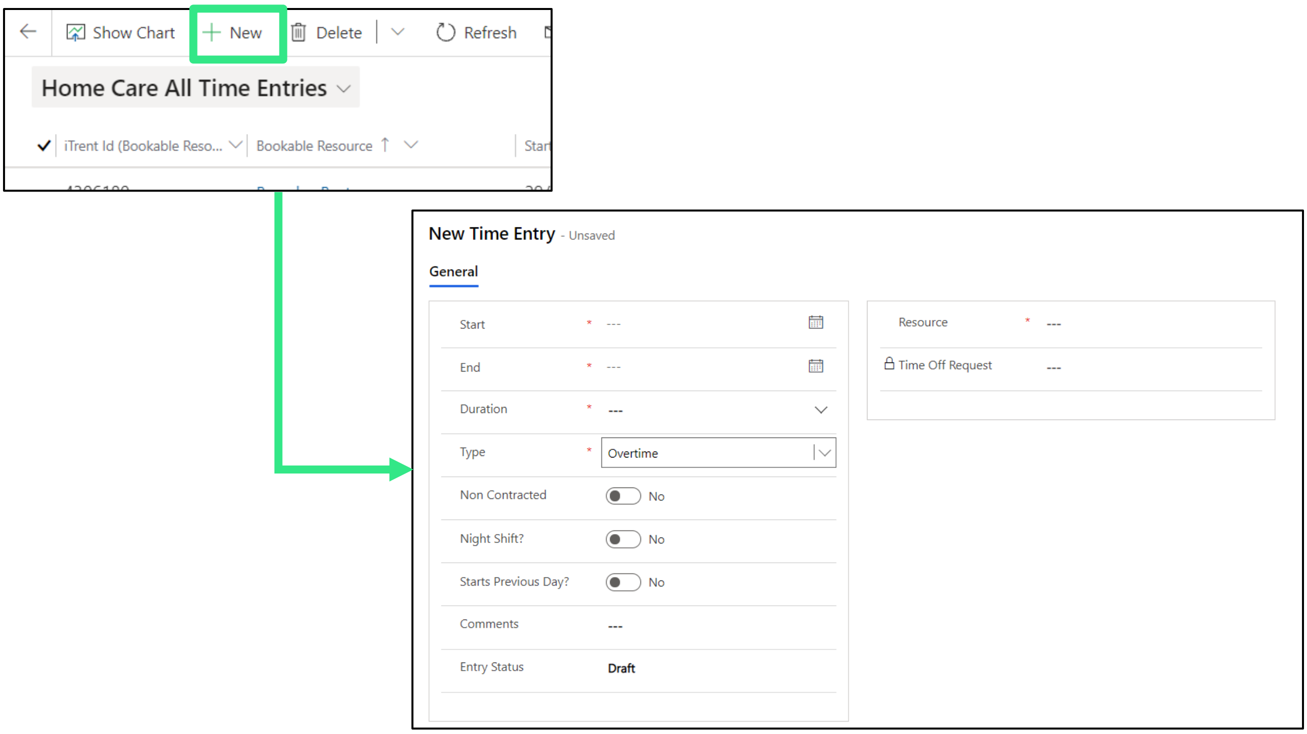


Figure 19. The time entry window that you should complete to record overtime – when the overtime option is selected it displays three toggles (Non contracted, night shift and starts previous day) to use to record all the information required to calculate overtime.

3. This will open a new window – complete the fields as follows:

Field	Instructions
Start	Select / record a start date and time that you want for the overtime record
End	Select / record an end date and time that you want for the overtime record
Duration	The duration will automatically calculate
Type	Select ‘Overtime’ from the dropdown list – this will cause the form to display the following three fields
Contracted	Select the same answer (yes or no) from the dropdown menu as you would in mySWIS
Night shift	Select the same answer (yes or no) from the dropdown menu as you would in mySWIS
Entry status	Select the same answer (yes or no) from the dropdown menu as you would in mySWIS

Resource	Search for, or type, the resource name for who you want to add as overtime
Entry status	Select 'Approved'
Description	Add a short note on overtime if required

4. Select **[Save & Close]** to save the new entry

This will then be used for a feed of data into mySWIS to calculate overtime for staff.

3.10 Processing absence[2]

ⓘ You shouldn't need to do this once iTrent is integrated with Field Services. **However, there are a couple of exceptions**. Any absence less than a day should be recorded in Field Service. Also at certain points of the year when iTrent is down for maintenance you may still need add leave manually using this process

Recording leave for a HSW in field services is quick and easy. Use the following steps to add annual leave:

△ Only do this if you have been specifically told to enter absence in Field Service instead of iTrent by Systems Admin or HR or the absence is less than a day

△ You will also need to complete time entry form so that this is logged and factored into overtime calculations (see instructions below)

To add absence in Field Service you should take the following steps:

[2] NOTE: This feature will be updated so that you will only need to complete a time entry, then this will update the calendar automatically

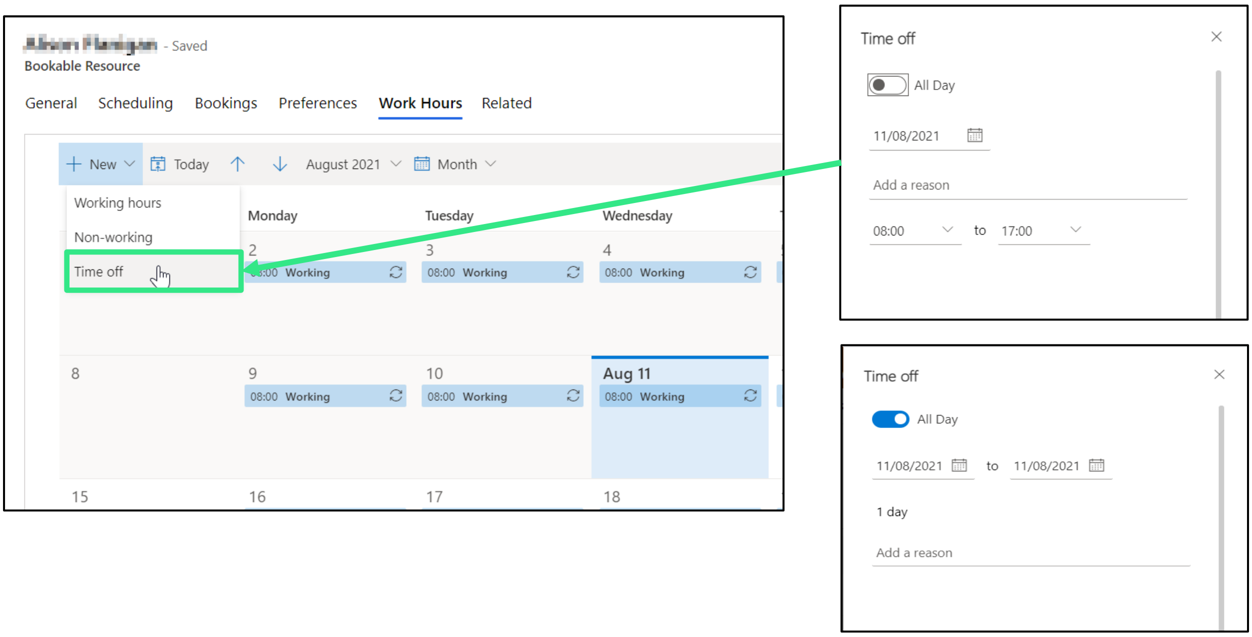


Figure 20. Selecting the option to add time off to a HSW's working hours. The screenshot shows the windows that appear when [Time off] is selected. The options presented depend upon whether the 'All day' toggle is switched on or off.

5. If the absence is for a whole day, or multiple days, select the toggle at the top to 'All day' (it will turn blue). If not leave it as it is
6. Select the date for which you want to record the absence as starting (if you'd already selected the day before clicking the [time off] off button then it will automatically pick this day. If you are recording multiple days off then you will need to select a start and end date
7. If the absence is only part of a day you can select the hours using the dropdown list of times in the two fields under the date field. Record a start and an end time.
8. Select **[Save]** at the bottom of the side-window
9. The absence will now appear as an orange bar in the HSW's working hours calendar

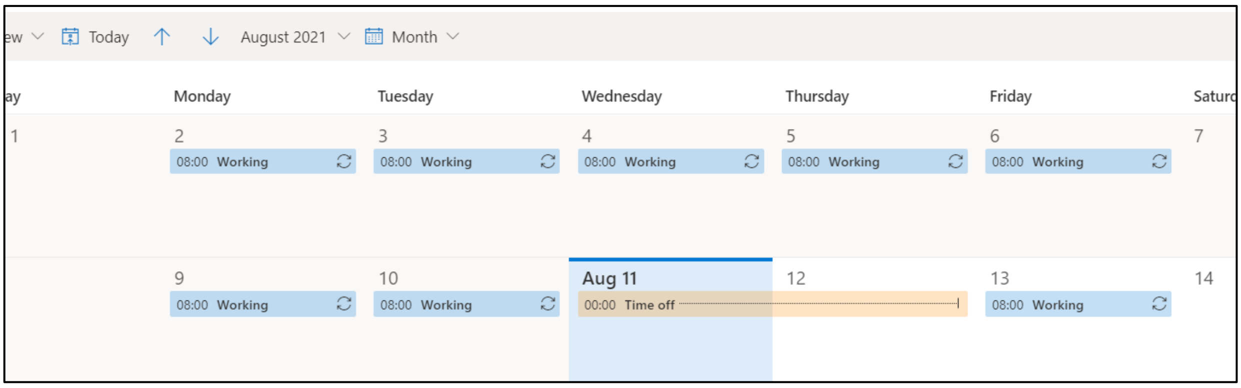


Figure 21. The orange bar that appears in the HSW working hours tab that represents time off.

This time off will also be reflected in the schedule board – the row for the HSW will be greyed out to show that they're unavailable.

10. Go to the 'Time entries' page in the 'Service' view
11. To create a new one, select the **[+ New]** to add a new overtime record

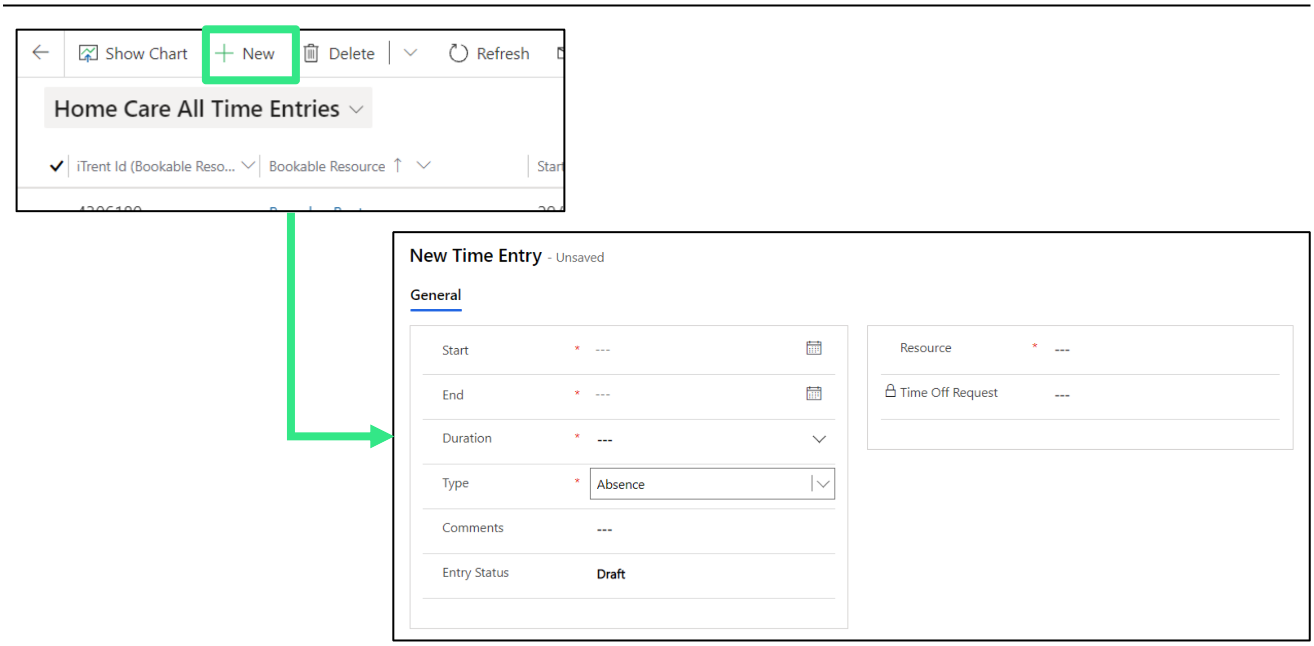


Figure 22. The time entry window that you should complete to record all the information required to calculate overtime.

12. This will open a new window – complete the fields as follows:

Field	Instructions
Start	Select / record a start date and time that you want for the absence record
End	Select / record an end date and time that you want for the absence record
Duration	The duration will automatically calculate
Type	Select 'Absence' from the dropdown list
Resource	Search for, or type, the resource name for who you want to add as absence
Entry status	Select 'Approved'
Description	Add a short note on the absence if required

13. Select **[Save & Close]** to save the new entry

This will then be used for a feed of data into mySWIS to calculate overtime for staff.

3.11 Edit a SU record

Service user records will be imported from mySWIS, therefore there should be minimal need to edit them.

You can send through changes to Field Service from mySWIS by selecting the [Release Changes to FS] button once you've created or edited a SU record.

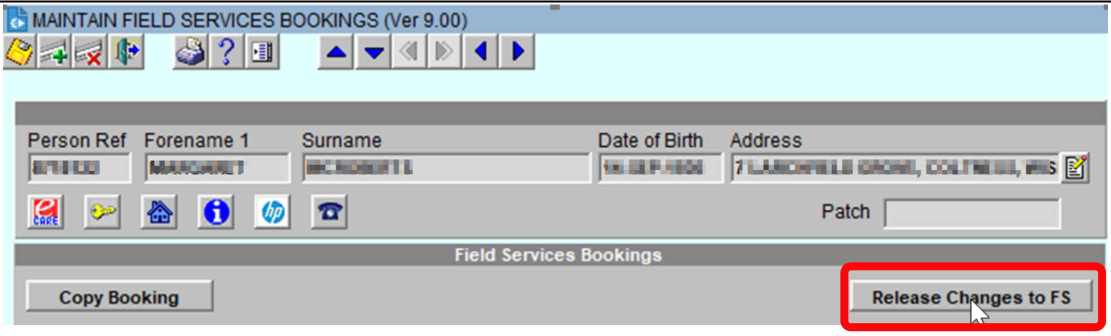


Figure 23. Updating Field Service when you change a SU record.

However, Field Services has been configured so that additional useful information can be recorded for SUs, that will help schedule appointments and complete visits. You can change (or add) details to the SU record, and also set preferred/prohibited workers there.

Steps for doing both of these are explained in the sections below.

3.11.1 Change SU record details

1. Navigate to the Service Users page in the Service view
2. Search for the SU for whom you want to edit their record

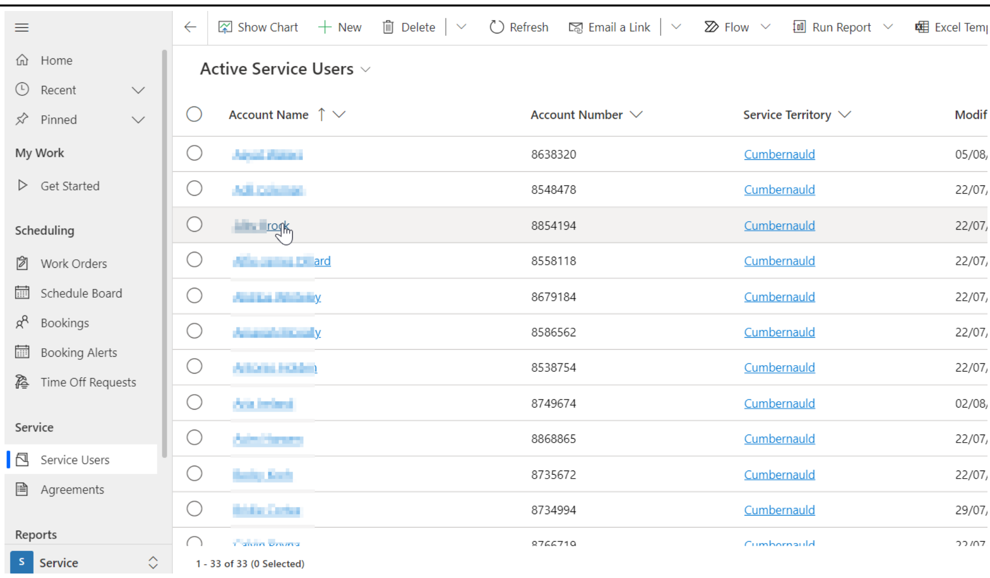


Figure 24. The Service Users page. This shows a list of (active) service users recorded in Field Services.

3. Open their record by selecting the SU name
4. Edit the field(s) that you want to update – a list of the fields recorded in a SU record are explained in the appendix 6.2 of this guide

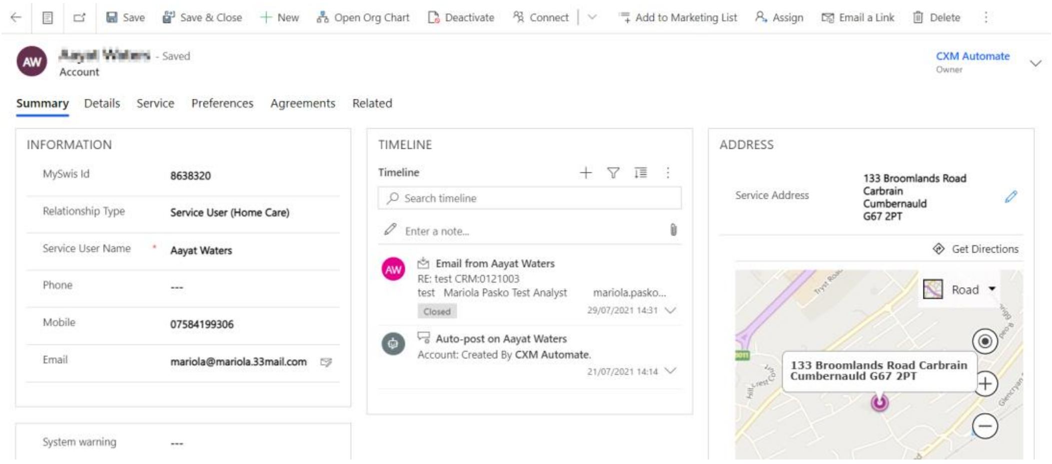


Figure 25. The SU record that is presented when you select them from the list in Service Users page. The fields that can/should be edited are presented on the first two tabs – 'Summary' and 'Details'. A guide for updating preferences is set out in the next section.

5. Select **[Save & Close]** to ensure your changes are saved

3.11.2 Set characteristics that limit types of HSW that can complete a visit

Field Services has been configured so that you can take into account some other specific factors that might stop you from booking an appointment for a SU with a specific HSW. These are:

- Where the SU only wants a HSW of a certain gender to make visits
- Where a HSW has either a pet allergy or a phobia of lifts – in these instances you would want to avoid pairing them up with either a SU that has pets, or lives at the top of a high-rise building

To make use of this you need to make sure the relevant details are recorded against both SUs and HSWs where they apply. This section shows how to record these against the SU:

1. Navigate to the Service view, then Service User page
2. Search for, and select the service user that you want to record details
3. Navigate to the 'Service' tab in the record
4. If you want to set a preference for a specific gender of carer the select the 'Preferred gender' field – this will present a dropdown menu with options for preference – select the one that applies for the service user
5. If you want to record that the service user has a pet or lives in a high-rise flat which requires lift access then select the 'SU characteristics' field – this will present another dropdown menu with options – select the one that applies
6. Select **[Save & close]** to save your changes

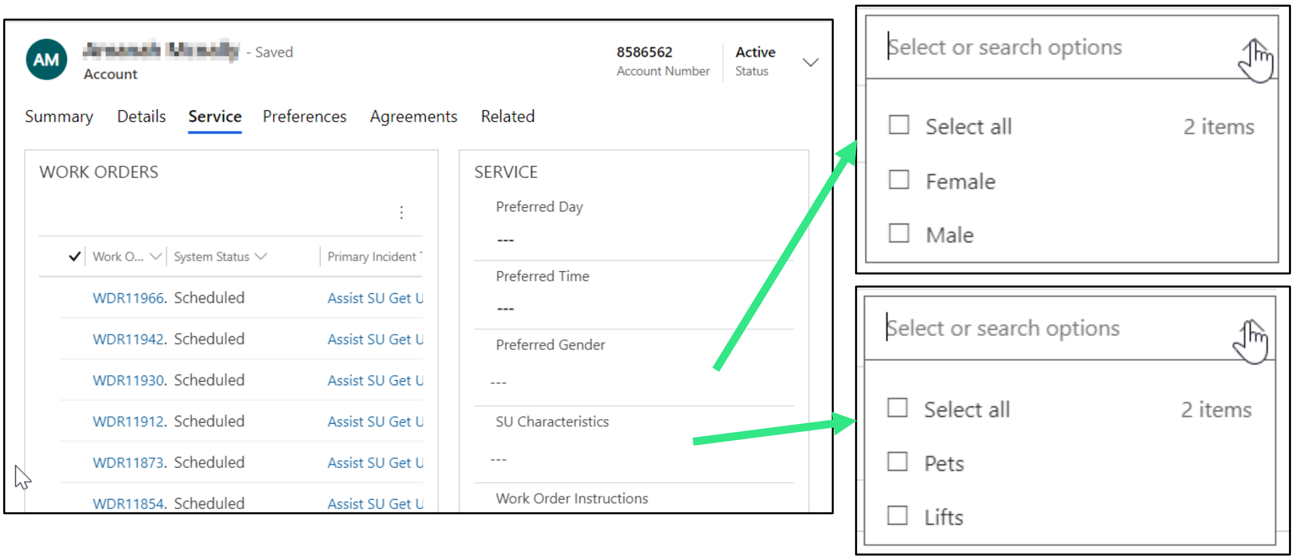


Figure 26. Adding or editing restrictions within a SU record.

3.11.3 Set preferred and restricted resources

You can add or remove resource preferences using the following steps:

1. Navigate to the Service Users page in the Service view
2. Search for the SU for whom you want to edit resource preferences
3. Open their record by selecting the SU name
4. Select the 'Resource preferences' tab from the top of the SU record, just underneath the toolbar

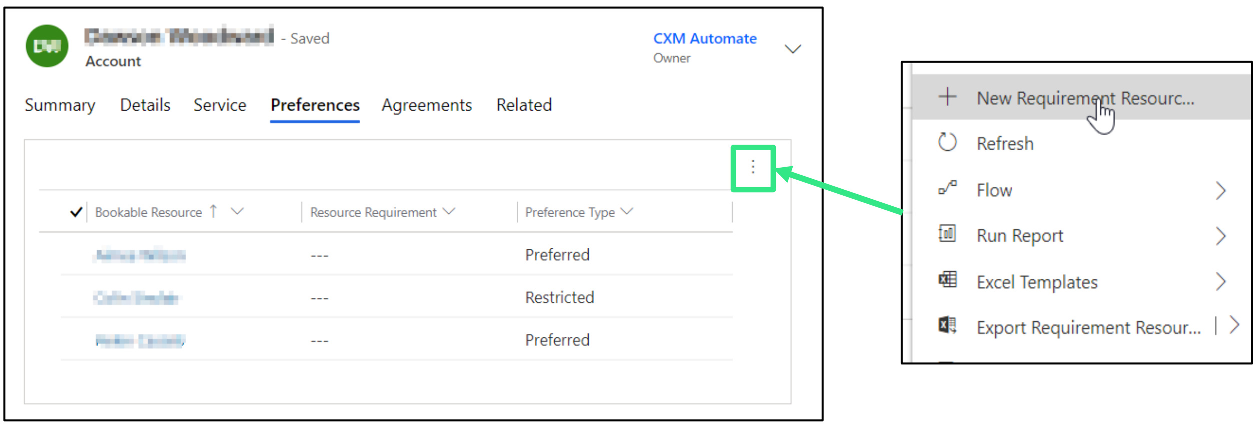


Figure 27. The 'Preferences' tab in a SU record and the menu displayed when you select the ellipses that allows you to create a new preference.

5. From this tab you will be able to add and remove resource preferences. The table below provides guidance on how to do both

Action	Guidance
Add a preferred resource	• Select **[+ New requirement resource preference]** – this will open a new widow on the right-hand side • Search for the HSW that you want to add as a preference using the 'Bookable resource' field – a drop-down list of HSWs will appear. Select the relevant one • In the 'Preference type' field select the 'Preferred' option from the dropdown menu • Select **[Save and close]** button
Add a restricted resource	• Select the **[+ New requirement resource preference]** – this will open a new widow on the right-hand side • Search for the HSW that you want to add as a prohibited worker using the 'Bookable resource' field – a drop-down list of HSWs will appear. Select the relevant one • In the 'Preference type' field select the 'Restricted' option from the dropdown menu • Select **[Save and close]** button
Remove an existing preference	Pick the existing resource from the list Select the vertical ellipses on the top right-hand corner of the 'Resource preference' tab – it will display a dropdown menu Select the 'Delete the Requirement resource preference' – this will generate a prompt asking you to confirm that you want to delete Select the **[Delete]** button

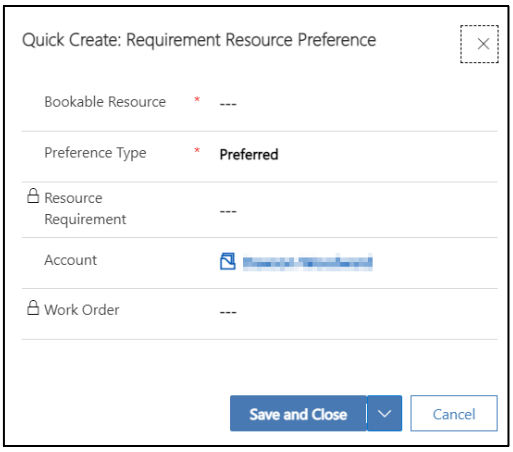


Figure 28. The new preference side-window where you can record a preference.

6. Select **[Save and close]** button

3.11.4 Add a permanent worker for a SU's visits

Just as in mySWIS you can add 'permanent' workers for specific visits within a SU care plan. By doing this you can also get field service to automatically book future visits in advance with that 'permanent' worker.

1. Navigate to the 'Agreements' page within the Service view

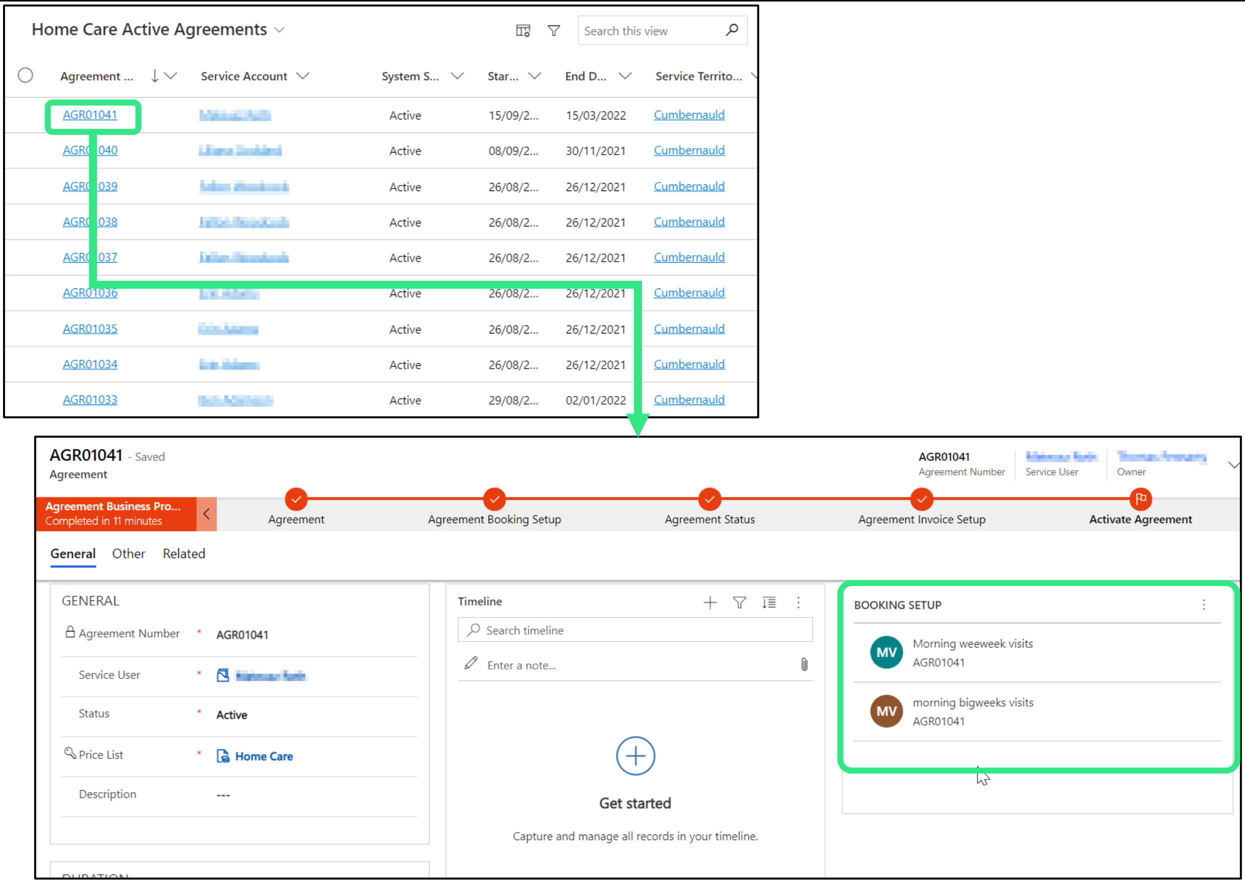


Figure 29. Selecting the Agreement from the list will open it. On the righthand side you will see the booking setups that contain information on all the visits.

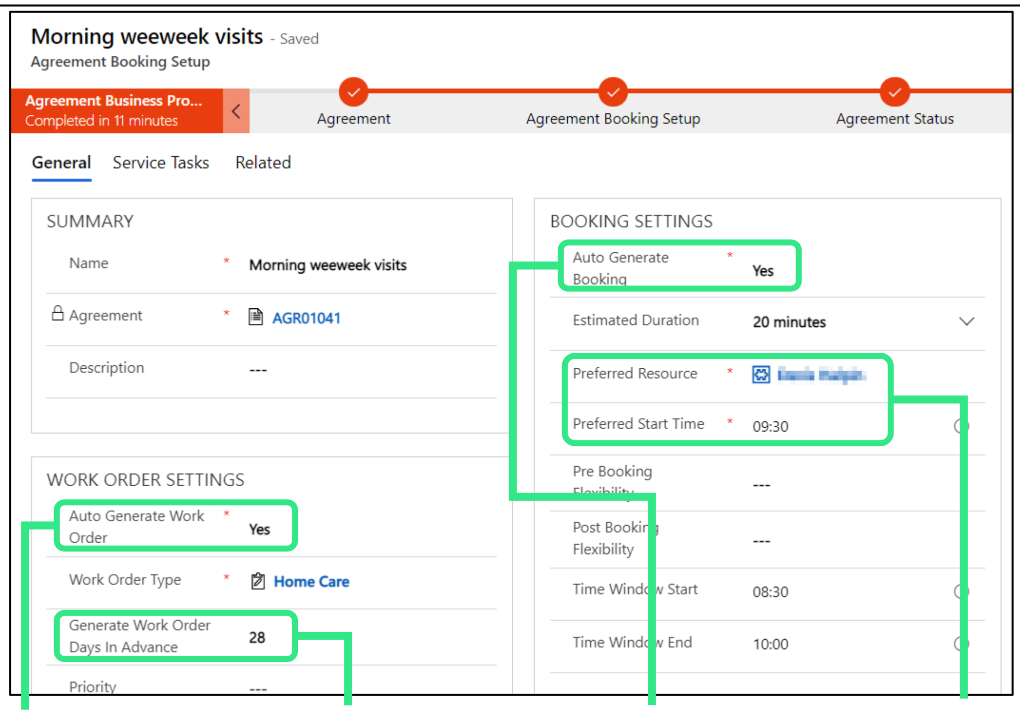
2. Search for, and select, the agreement relating to the SU you want to add a permanent worker – make sure you select the agreement number – this will open the agreement

ⓘ You can also access the agreement through the Service User record – it should appear on the 'Agreements' tab

3. In the agreement there will be a set of 'Booking setups' – these contain the details of the visits that sit within the care plan – select the setup that you want to add a permanent worker for
4. The booking setup will display a range of information for that particular set of visits, but the key fields are set out in the table below.

Field	Description
Auto-generate work order	This field determines whether or not Field Service automatically generates new visits to be booked for this particular booking setup – it will be set as 'Yes' so that they are automatically generated
Generate work order days in advance	This field determines how far in advance Field Service generates these visits to be booked

Auto-generate booking	This field sets whether Field Service either generates the visit (and leaves it in the unscheduled visits table for someone to manually book) or automatically books the visit **provided the following information is recorded…**
Preferred resource	This is the equivalent of a 'Permanent worker' in mySWIS To automatically book any open visits Field Service must be 'told' who it should book it with. If you want these visits booked automatically then you must put the 'preferred resource' in.
Preferred start time	You must also put a preferred start time so that Field Service knows what time of day it should seek to book the visit.



Sets whether visits will be automatically generated

Sets how many days in advance to generate visits

Sets whether visits will be automatically booked

Specifies who with, and when, to book the visits

Figure 30. The booking setup fields that you can use to set a permanent worker and prompt Field Service to automatically book visits.

5. In the booking setup 'Auto-generate' booking field select 'Yes' from the dropdown list – this will prompt the 'Preferred resource' and 'Preferred time' to appear
6. In the booking setup 'Preferred resource' field either type a name (and pick the correct one from the automatically generated dropdown list) or pick from the dropdown list
7. Enter a time in the 'Preferred time' field when you would like Field Service to make the booking
8. This has now set a 'permanent worker' for those visits that Field Service will automatically book in advance – select **[Save & close]** to save your changes

ⓘ The booking setup also includes information on priority and the time window ('Time window start' and 'Time window finish') within which a visit must happen – these should automatically populate from mySWIS but you can also edit these here

3.12 Add or edit an SU care plan / visits

New care plans, changes to care plans and terminations will be imported from mySWIS, therefore there should be minimal need to edit them in Field Service. But there are a couple of things you will need to do differently to enable this.

3.12.1.1 Add a new care plan

△ If you are adding a new care plan with multiple visits, please first send through

To add a new care plan, please follow the instructions below to do this:

1. Begin adding a new plan to mySWIS as you would normally do so
2. Create a single order first in mySWIS
3. Select the **[Release Changes to FS]** button on the screen – this will send that order through to Field Service to generate a new 'Agreement'
4. Continue creating the remaining bookings in mySWIS
5. Once you have finished, select the **[Release Changes to FS]** button on the screen again – this will send through the remaining visits to Field Service to add to the agreement

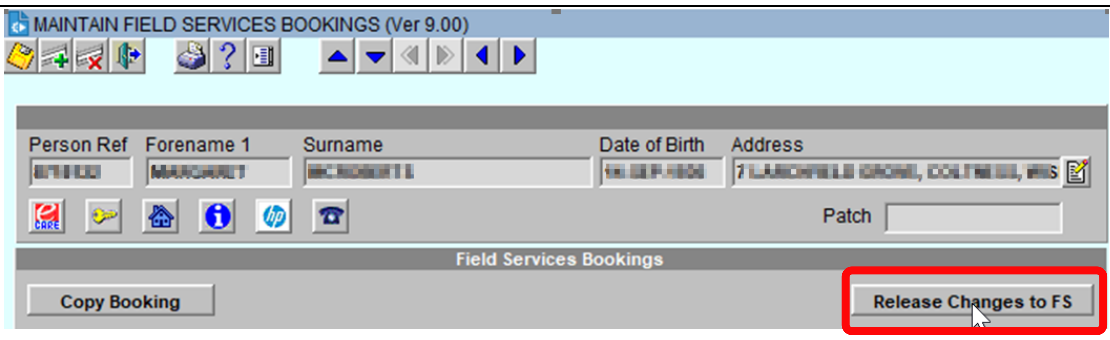


Figure 31. The [Release Changes to FS] button to select when adding or editing a care plan in mySWIS.

3.12.1.2 Edit a care plan

Make any changes you need to in mySWIS, then select the [Release Changes to FS] button once you are completed. This will send through changes to Field Service.

3.13 View the schedule board

The schedule board provide a view of all appointments that have been booked, as well as a variety of other information. To view the schedule board navigate to the Schedule Board page within the Service view.

ⓘ There are two types of view available for the schedule board – an 'Old' and a 'New' view. The old view is being gradually phased out by Microsoft. Both are shown below.

You can choose to display several panels and toolbars on the board that help you to monitor and manage appointments – the screenshots below show you these features.

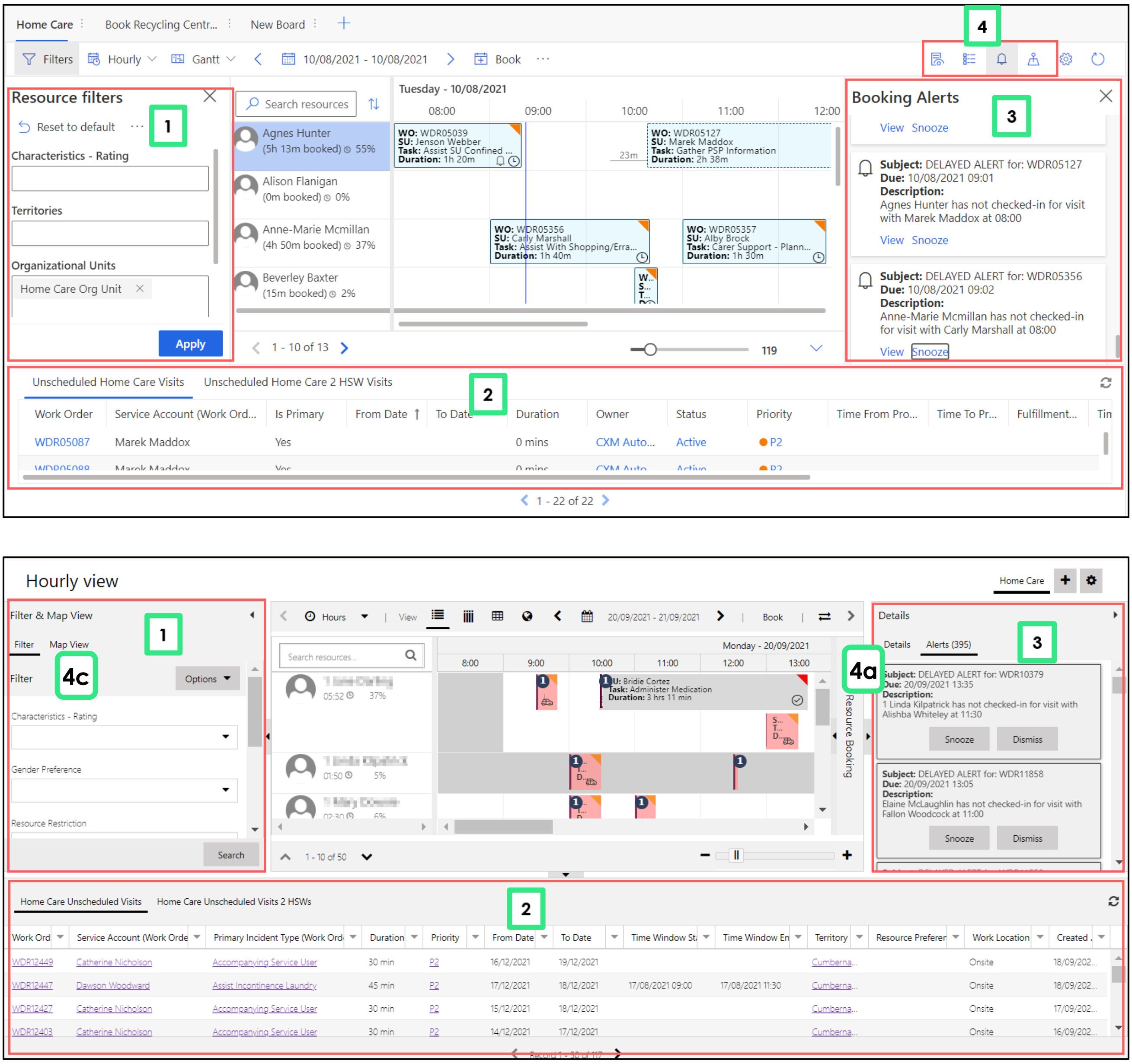


Figure 32. A view of both the 'New' (top) and 'Old' (bottom) schedule board pages with the toolbars showing.

Here is a quick explanation of the toolbars and panels that can be shown as part of the scheduling view:

1. **Resource filter toolbar** – a search tool that allows you to find resources with certain attributes by using the filter fields e.g. Territories, Organisational units, characteristics, etc.
2. **Unscheduled work orders toolbar** – a list of all the open work orders that have not been booked. This allows you to select an open work order and schedule it quickly
3. **Booking alerts** – this is a toolbar showing all the alerts for late or missed appointments. You can view details by selecting each alert.
4. **Other options** – this provides further optional views including:
    a. **Details panel** – panel that shows details of any booking on the schedule board that you select
    b. **Legend panel** – panel provides a key of the icons and colours used on the schedule board

c. **Map view** – panel provides a view of visit locations and the current locations of bookable resources

3.13.1 Toggling between the new and old views

You can switch between the old and new views using the toggle in the top righthand corner of the schedule board.

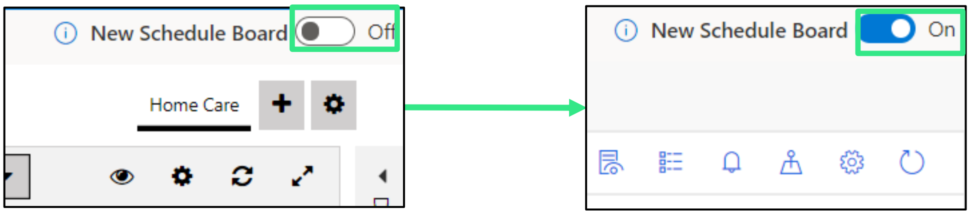
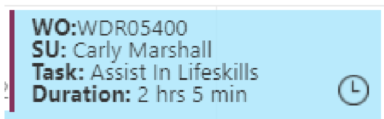
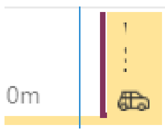
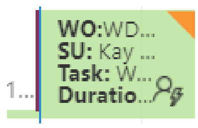


Figure 33. The toggle to switch between the old (left) and new (right) views.

3.14 Track and edit progress of booked appointments

The schedule board displays appointments and uses a set of colours and icons to show their progress. The table below shows the status of each visits.

Icon / colour		Status
	Blue, clock	Visit has been scheduled
	Amber, car	HSW is on their way to the scheduled visit and is on time
	Red, car	HSW is on their way to a scheduled visit, but is delayed The orange triangle means this is a P2 visit
	Green, person	Visit is in progress The orange triangle means this is a P2 visit
	Grey, tick	Visit has been completed The orange triangle means this is a P2 visit

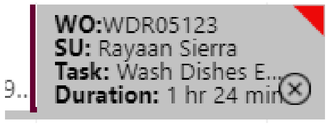
Icon / colour		Status
	Grey, cross	Visit has been cancelled by the service user The red triangle means this is a P1 visit

Figure 34. Key for the bookings colours and icons used on the schedule board.

HSWs change the status of visits using the mobile app so that there is up-to-date information the progress of the visit.

You can also manually change the status of an appointment, using the following steps:

1. Right-click on the appointment for which you want to change the status
2. Select the ‘Change status’ option from the dropdown menu
3. Pick the relevant status from the list of options

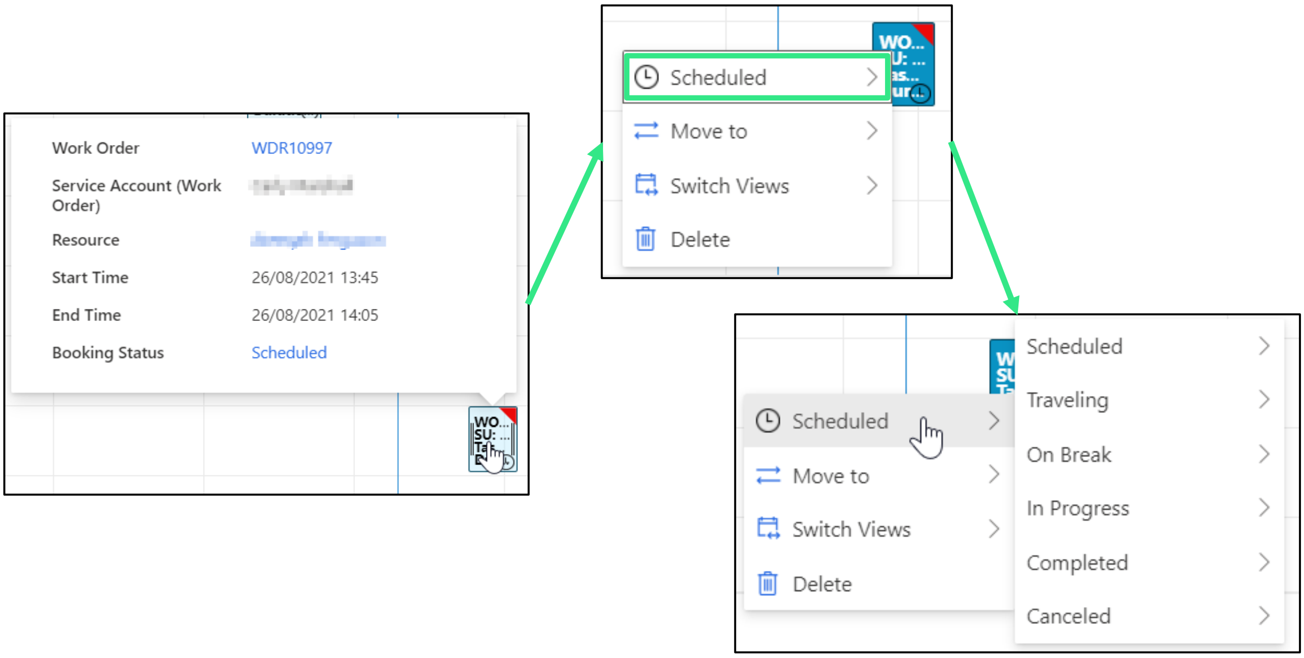


Figure 35. Changing the status of a booking in the Schedule board.

The following options are available for status.

Status	Description
Scheduled	Visit is scheduled but won’t have started yet
Travelling	The HSW is on their way to the visit
Travelling delayed	The HSW is on their way but are likely to arrive late
In progress	The HSW is carrying out the visit
On break	The HSW is on a break – should not be used

Completed	The HSW has completed the visit
Customer cancelled	Service user has cancelled or is not available for the visit – **not to be used without a discussion with a Support Officer**
Rejected	Visit is not suitable for the allocated HSW and should be reallocated if possible – **not to be used without discussion with a Support Officer**

3.14.1 View booking alerts

If a HSW has not updated the status of the visit by the time they are meant to have started Field Service will generate an alert to notify the service that an appointment is at risk of being missed. These will show on the schedule board, but they can also be viewed through a sidebar on the board.

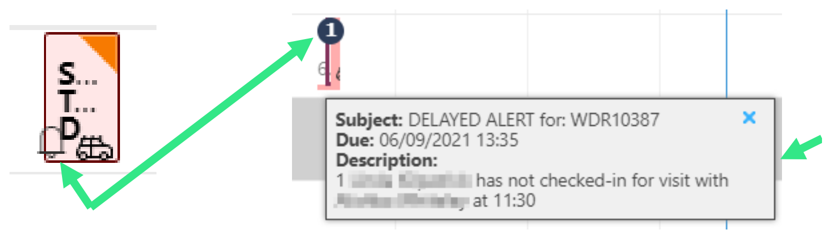


Figure 36. The alerts that appear on the schedule board. On the left is the view on the 'New' schedule board. On the right is the 'Old' schedule board view.

You can view alerts by doing the following:

1. Open the Schedule board
2. Navigate to the top righthand corner of the board where there is a row of icons for sidebars that you can open
3. Select the bell icon – this will open the alerts sidebar. All booking alerts generated by the system are listed here
4. Once you have read an alert and responded you can dismiss it by hovering over it with your cursor and selecting the [X] button in the top right-hand corner

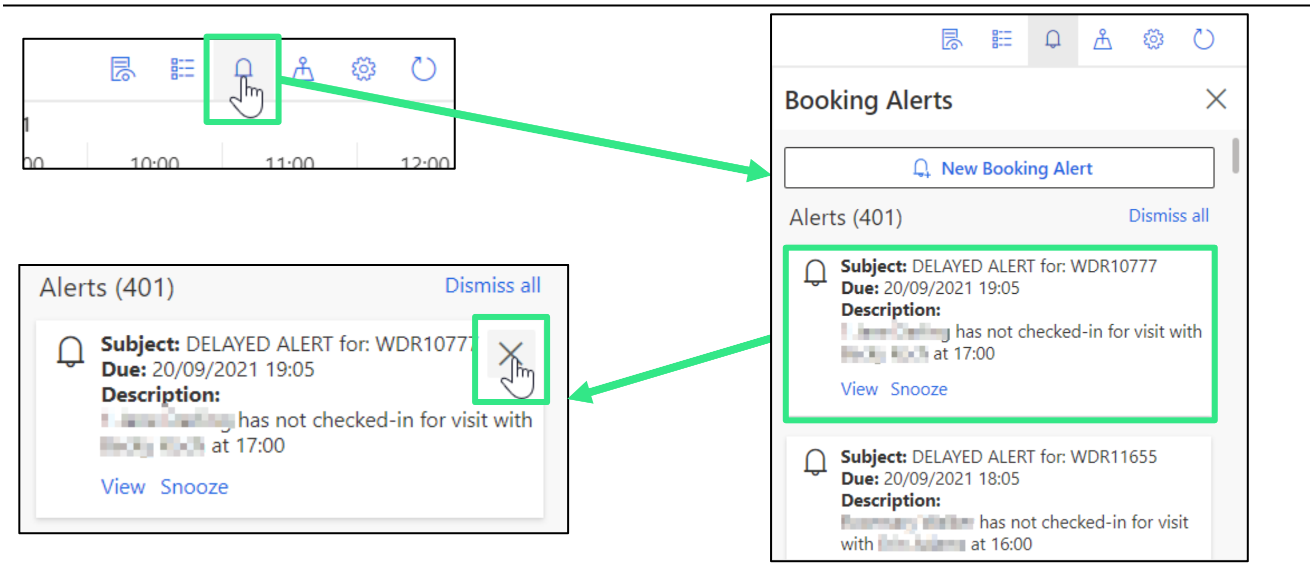


Figure 37. How to open the alerts sidebar to view all booking alerts generated by Field Service.

3.15 Book an unscheduled appointment

There are a couple of ways you can book unscheduled appointments. The easiest way is through the schedule board – this is explained below.

1. Navigate to the Schedule board page in the Service view

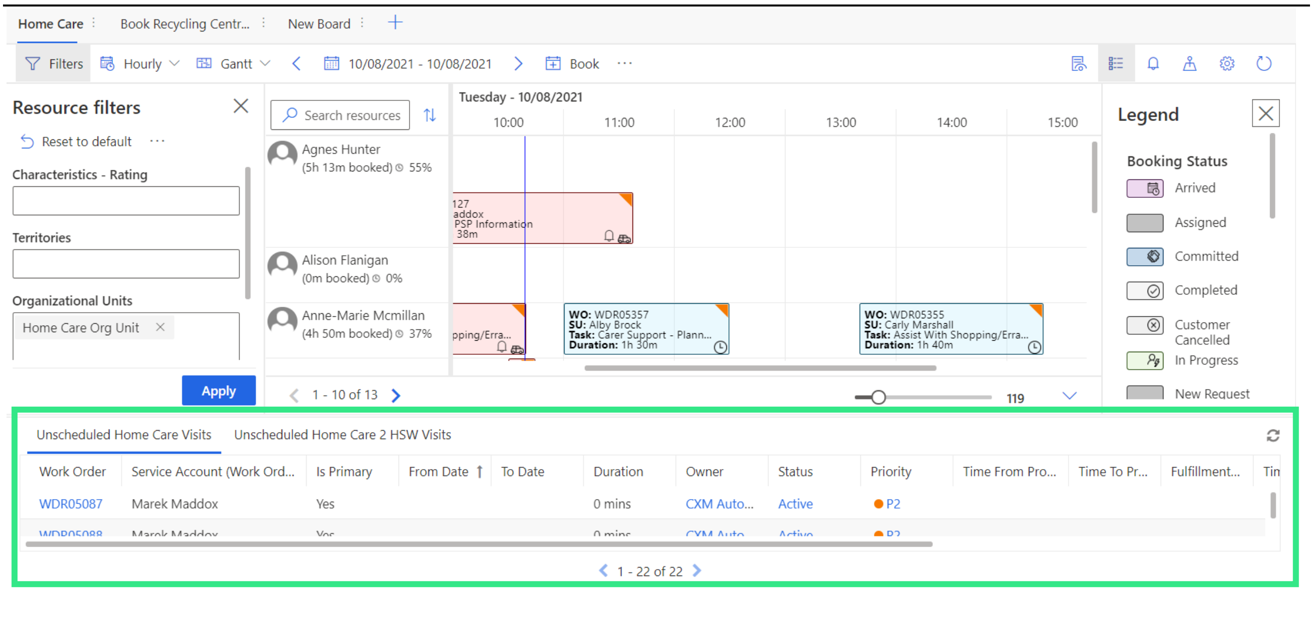


Figure 38. The schedule board with a list of unscheduled visits highlighted in the red box.

2. The board displays a list of unscheduled visits below the schedule window
3. Search for the unscheduled order that you want to book
4. Select the row showing the order

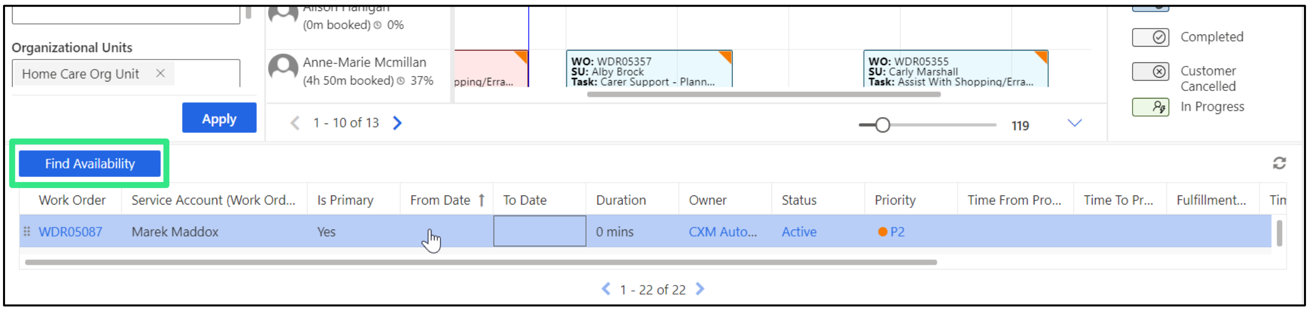


Figure 39. The 'Find availability' button that appears when an un-booked visit is selected.

ⓘ Avoid selecting any of the text as this will open up the work order rather than giving you the option to book it

5. A **[Find availability]** button should appear – select it
6. This will prompt schedule assistant to search for suitable resources with whom you can book the order
7. A list of HSWs who are available will be presented in the schedule view – a white box will show the times where they are available to carry out the visit. This also includes estimated travel time

Figure 40. The schedule board view when using Schedule Assistant to find a suitable slot for booking a visit (available slots are shown as white boxes with a dotted blue outline) and the dialogue box that appears when you select a time and resource for booking a visit.

8. You can choose a slot to book by selecting a time within any of these white boxes
9. This will generate a box prompting you to book the visit – select either the **[Book]** or **[Book & exit]** buttons
10. The new appointment will now appear in the schedule board as a booked visit – it will appear as a blue box with a clock icon in the row next to the HSW that you've booked it with

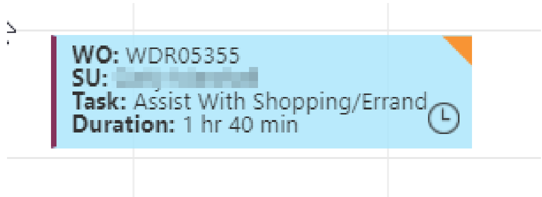


Figure 41. The booking will appear on the schedule board.

ⓘ When booking appointments requiring 2 HSWs the options are presented slightly differently – rather than a schedule board with vacant slots, the assistant will list suitable combinations of bookable resources and times for you to select.

3.16 Reschedule an existing appointment

There are a few ways that you can use Field Service to re-book appointments. The method you choose might depend upon your knowledge of the service users and HSWs, as well as how quickly you want to complete the task. The table below summarises the options, and then each is explained below

Option	Pros	Cons
'Drag and drop'	Can do on the schedule board or the map Very quick	Doesn't use schedule assistant so will not apply rules Must know the visit, SU and your HSWs to know which combinations are suitable
Right click and 'move to'	Can quickly change HSW and/or time Quick	Doesn't use schedule assistant so will not apply rules Must know the visit, SU and your HSWs to know which combinations are suitable
Right click and 'Rebook'	Factors in all rules around skills, travel time, etc. for you	Can only do in the 'old' schedule board view (for now) Takes slightly longer

3.16.1 Drag and drop

An easy way to reschedule an appointment is to drag it from its existing slot on the schedule board, to an alternative time and HSW. You can do this as follows:

1. Place your cursor on the appointment you want to reschedule – a pop-up with summary details of this booking will appear

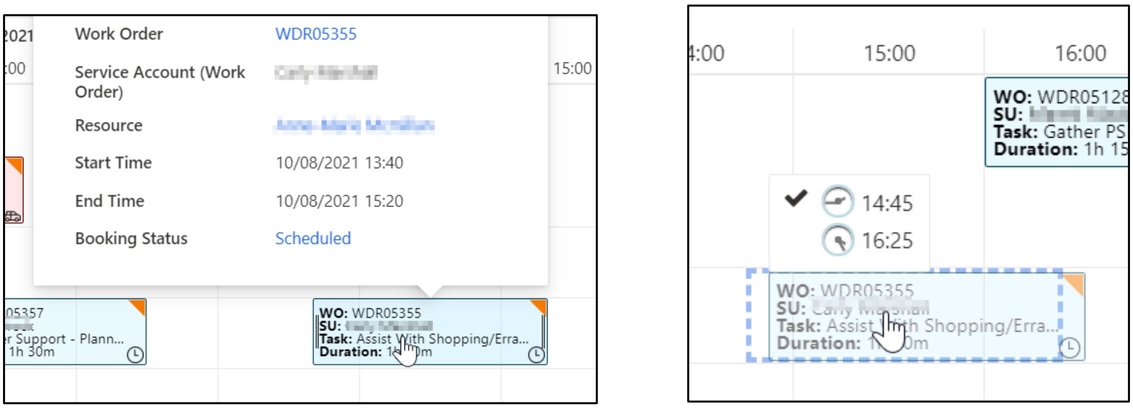


Figure 42. The information popup that appears when you hover your cursor over an appointment, and the view when dragging an existing visit to reschedule in an alternative slot

2. Drag it to the time and resource on the schedule board that you want to move it to, by selecting the booking, holding down the cursor
3. A blue box will appear showing where the appointment will be rescheduled to – once you are satisfied release the cursor
4. The appointment should appear in its new time, against the new resource, in the schedule board

3.16.2 Move to

1. Right click on the booking you want to reschedule
2. This will open up a menu – select **[Move to]**

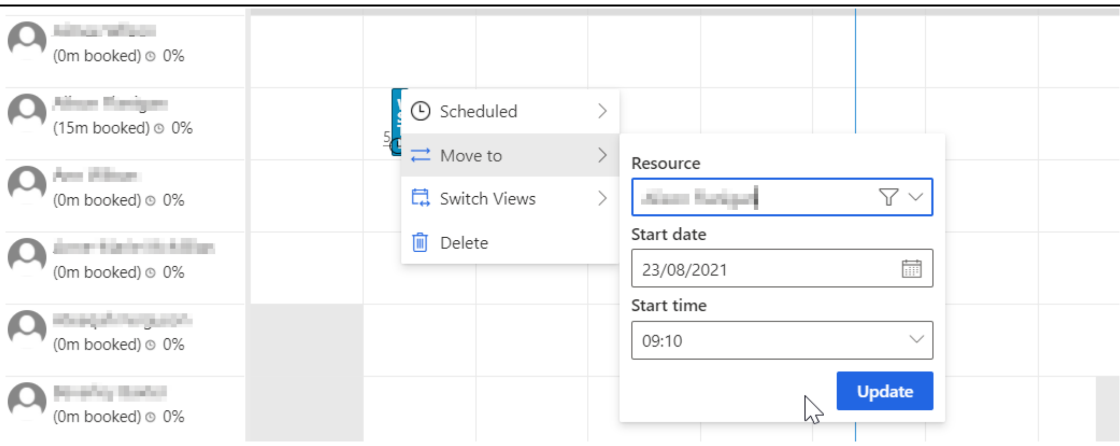


Figure 43. The menu that appears and allows you to reschedule when you right click an appointment.

3. This will open up a set of three fields
4. The first lets you change the HSW it is booked with – you can either type in the name of the HSW you want to reallocate the appointment to, or select from a list that presents when you go into this field
5. The second lets you change the date – again you can type in a date or select from a list if you click the calendar icon
6. The third lets you change the time – as with the others you can type in a time or select from a list
7. Once you are happy with your changes select **[Update]** – this will change the booking

3.16.3 Rebook

Another option is to right click the booking and select **[Rebook]**. You can do this as follows:

1. Select the booking on the schedule board that you want to re-book
2. Right-click and a menu will appear

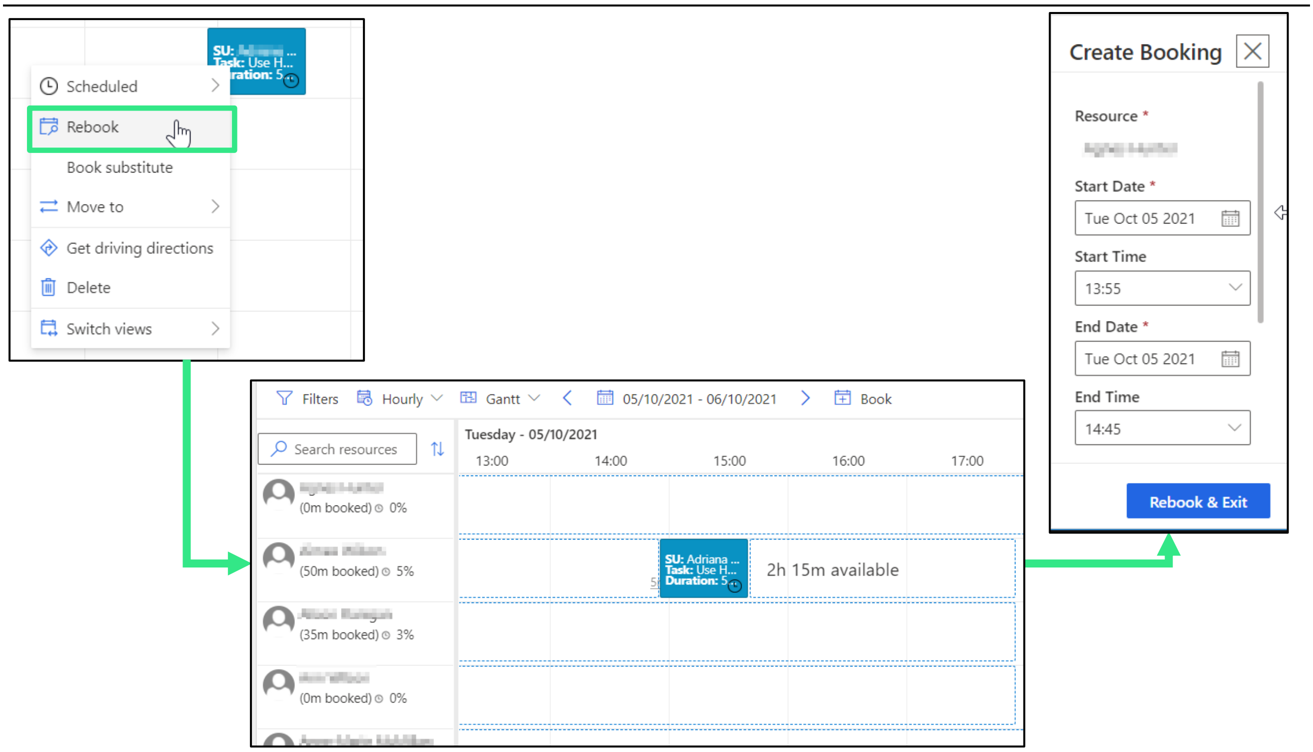


Figure 44. The menu that appears when you right click the appointment in the 'old' schedule view (left), the presentation of vacant slots in which you can re-book the appointment in Schedule Assistant (centre) and the confirmation window the displays once you have selected a time and resource (right).

3. Select the **[Rebook]** option – open up schedule assistant
4. As with normal bookings the schedule board will display a list of HSWs and boxes in which you can schedule the appointment
5. Select a HSW and time on the board – as you move the cursor across the board the popup will show you the start time of the booking for where your cursor is
6. A window will appear asking you to confirm your booking – it will show details of the HSW and timing
7. Select **[Rebook & close]**

3.17 Cancelling visits

In some circumstances you may want to cancel a small number of visits for a SU for a short period of time (e.g. are staying with family, booked holiday, etc.). Depending upon when those visits are you are able to remove these from the schedule.

Scenario	How to cancel
Cancel visits that are already booked	Either select visits in the schedule board and change status to 'Canceled' or Select the relevant bookings in the Bookings view and set to cancel (see below for instructions)
Cancel visits within the next 28 days that have yet to be scheduled	Select the relevant visits in the Resource Requirements view and set to cancel (see below for instructions)
Cancel visits in advance (e.g. in two months' time)	Select the relevant bookings in the Booking setup and cancel (see below for instructions)

3.17.1.1 Cancel booked visits

To cancel visits that are already booked use the following steps:

1. Go to the 'Bookings' view in Service – this will present a list of visits that have already been booked
2. Use the search and filter functions to find the bookings that you want to cancel (see section 3.6 for instructions on how to use these)
3. Select the visits that you want to cancel by clicking the space under the circle on the far left of the table for each row with a relevant booking – all the bookings you have selected will be highlighted blue

ⓘ You can select a long list or big range of bookings by selecting the first one, holding down control, and then selecting the last one you want to cancel – Field Service will highlight all the bookings in between

ⓘ You can select all bookings on a list by selecting the circle at the top of the table

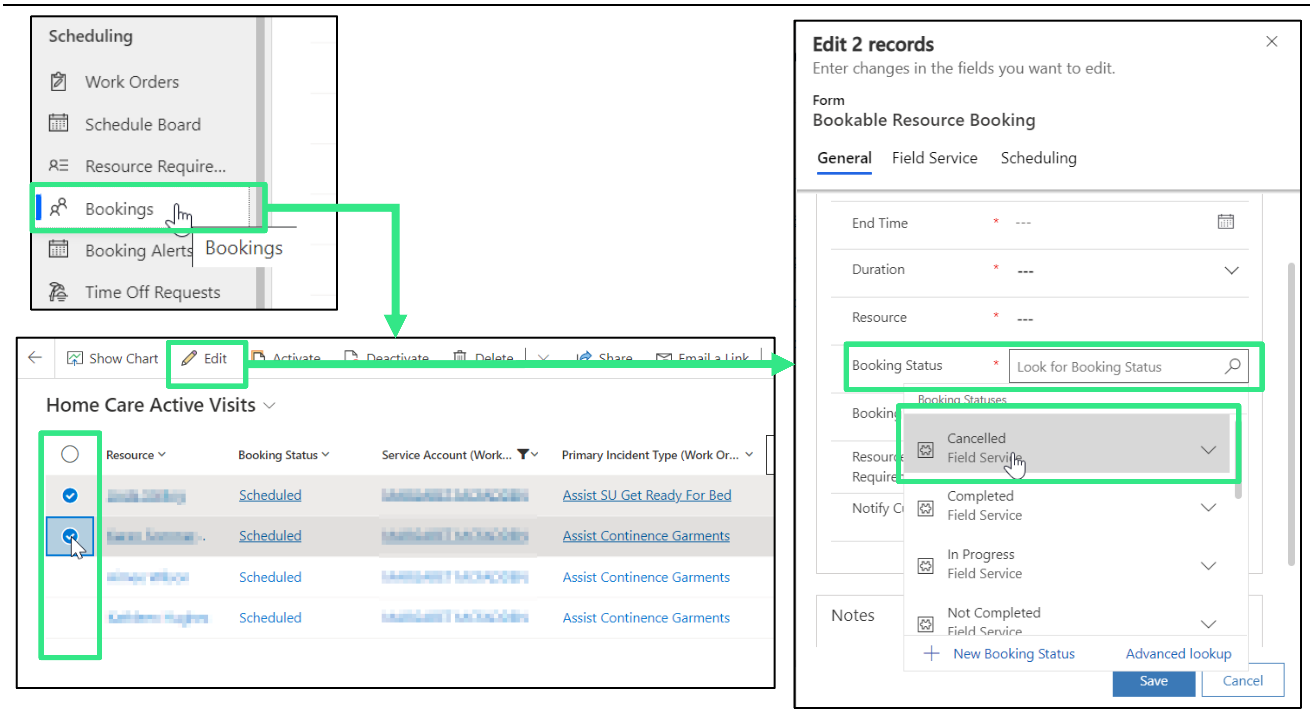


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Figure 45. Selecting visits and editing them so that they are cancelled.

4. Above the table a **[Edit]** button will appear – select it - This will open a form on the righthand side of the window
5. In the form set the status of the booking(s) to 'Cancelled' – you can do this by selecting the spyglass and choosing that option from the dropdown menu
6. You can add a note in the field to capture any reason
7. Select **[Save & close]** – the bookings will be cancelled

3.17.1.2 Cancel unscheduled visits

To cancel visits that have not yet been booked use the following steps:

1. Go to the 'Resource Requirements' view in Service – this will present a list of visits that have already been generated but yet to be booked
2. Use the search and filter functions to find the service user / visits that you want to cancel (see section 3.6 for instructions on how to use these)
3. Select the visits that you want to cancel by clicking the space under the circle on the far left of the table for each row with a relevant booking – all the visits you have selected will be highlighted blue

ⓘ You can select a long list or big range of visits by selecting the first one, holding down control, and then selecting the last one you want to cancel – Field Service will highlight all the visits in between

ⓘ You can select all visits on a list by selecting the circle at the top of the table

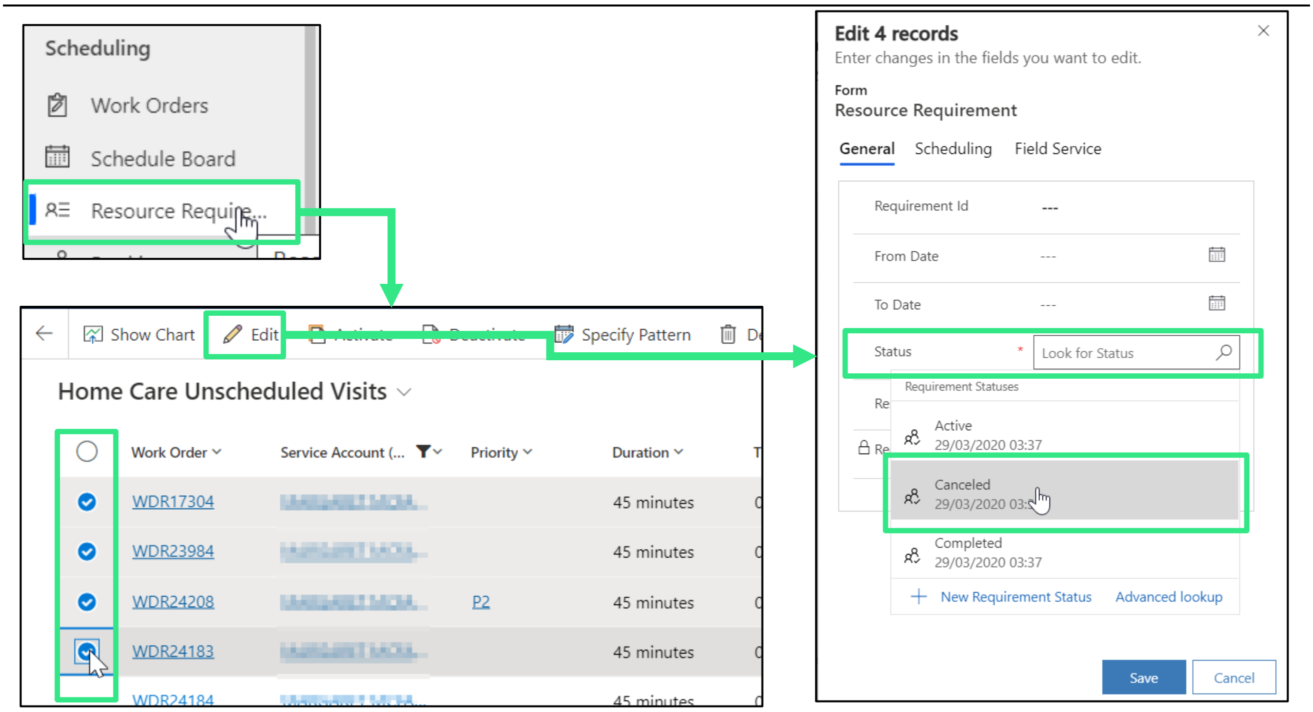

Figure 46. Selecting and cancelling unscheduled visits using the Resource Requirements page.

4. Above the table a **[Edit]** button will appear – select it - This will open a form on the righthand side of the window
5. In the form set the status of the booking(s) to 'Cancelled' – you can do this by selecting the spyglass and choosing that option from the dropdown menu
6. You can add a note in the field to capture any reason

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7. Select **[Save & close]** – the bookings will be cancelled

3.17.1.3 Cancel visits further in advance

You can cancel visits in advance using the following steps:

1. Open the ‘Agreements’ page within the Service view
2. Select the agreement of the SU whose visit(s) you want to cancel

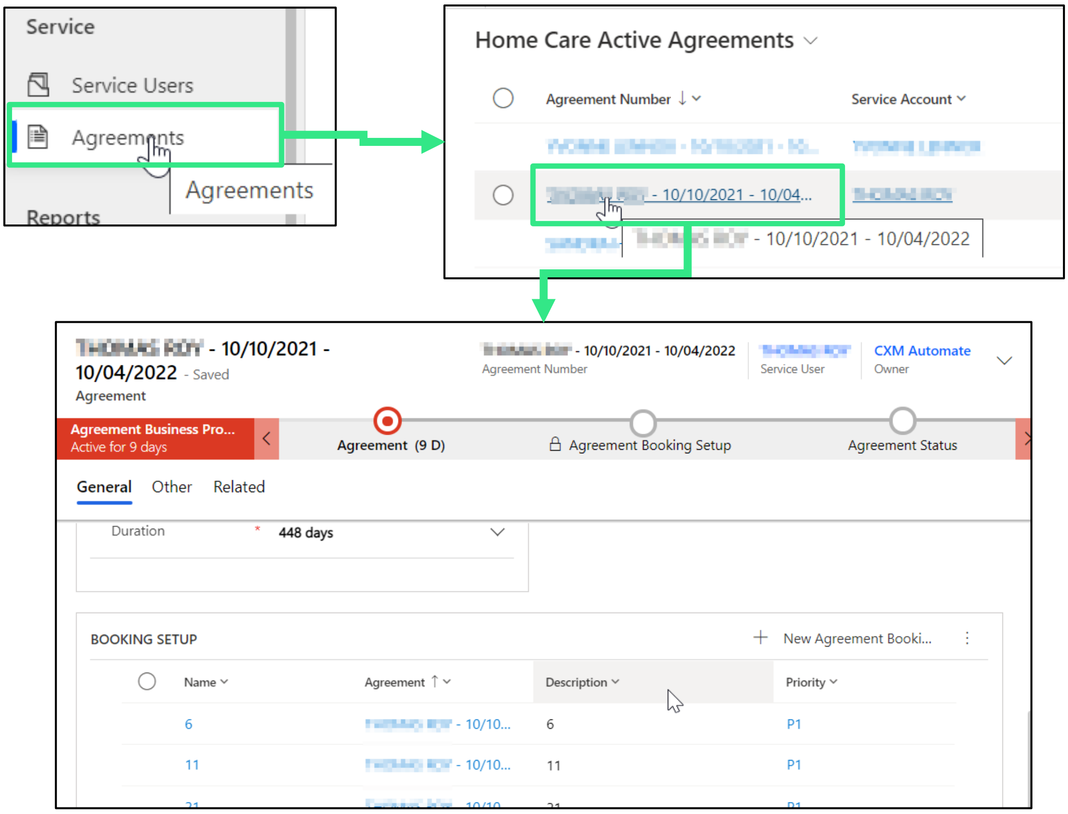

Figure 47. Selecting an agreement for the SU that you want to cancel visits in the future.

3. Within the agreement select the booking setup which contains the visit(s) you want to cancel
4. In the booking setup there is a list of booking date – select the booking dates you want to cancel by clicking the left side of the row underneath the circle at the top of the table
5. An **[Edit]** button will appear – select it – this will open up a form
6. Set the status field to ‘Canceled’ using the dropdown menu
7. Select **[Save]** – the visits for these days will no longer be generated and require scheduling

ⓘ You may need to go into more than one booking setup to cancel visits – if so, repeat steps 3 to 7

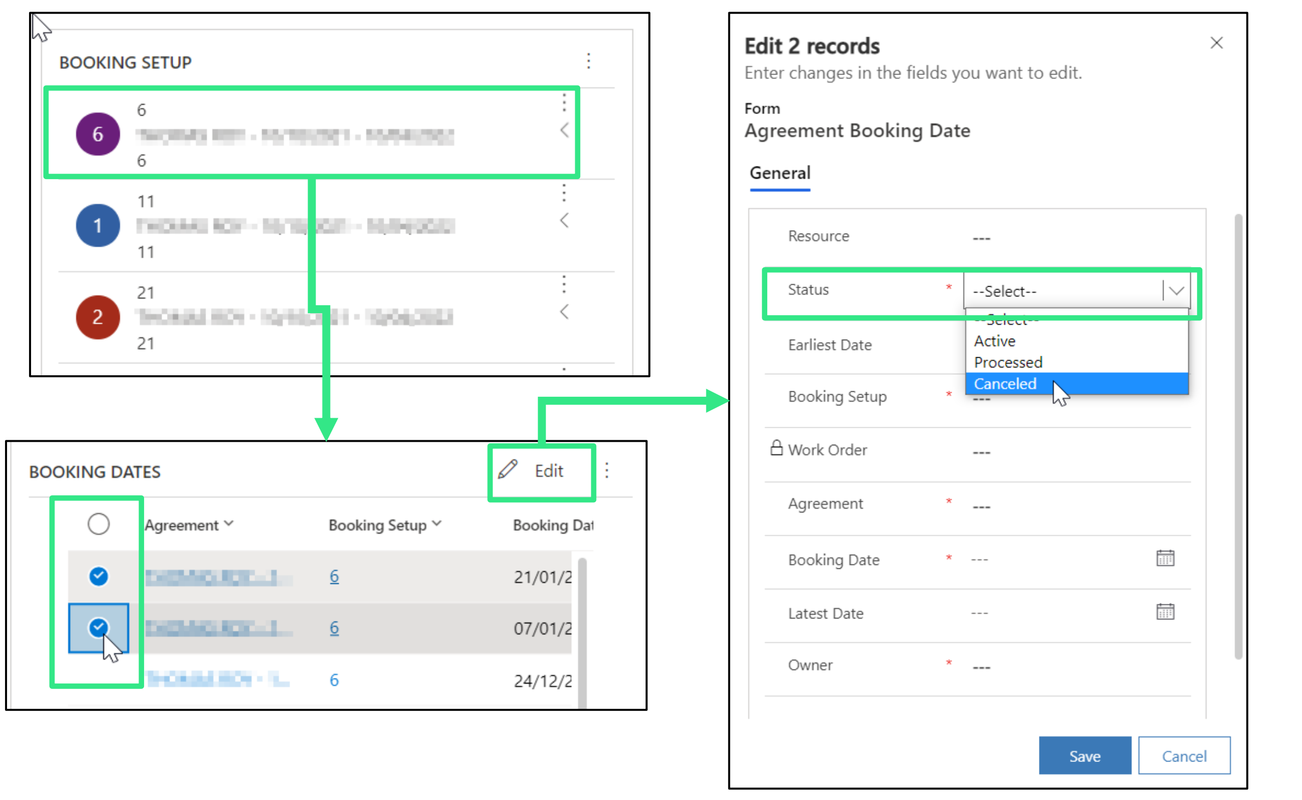

Figure 48. Selecting the booking setup, then booking dates, to cancel in advance.

3.18 Temporarily suspending a care plan / agreement

When a service user does not need home care for a short period of time you are able cancel the appointments. Alternatively, you can suspend / terminate the care plan.

> ⚠ The integration with mySWIS will allow field services to pick up where care plans have been suspended, meaning that you should not need to do this in Field Service

You can manually suspend the visits required through the following steps:

1. Open up the service user account for whom you want to temporarily suspend visits by navigating to the Service view then the Service Users page and selecting them
2. Navigate to the Service tab within their record – this will display a list of bookings
3. Select the bookings that you wish to cancel, by clicking the rows of the bookings
4. An **[Edit]** button will appear – select it
5. This will either open the booking (where you select one) or a side-window (where you have selected multiple bookings)
6. Change the Status field to 'Estimate'
7. Select **[Save]**

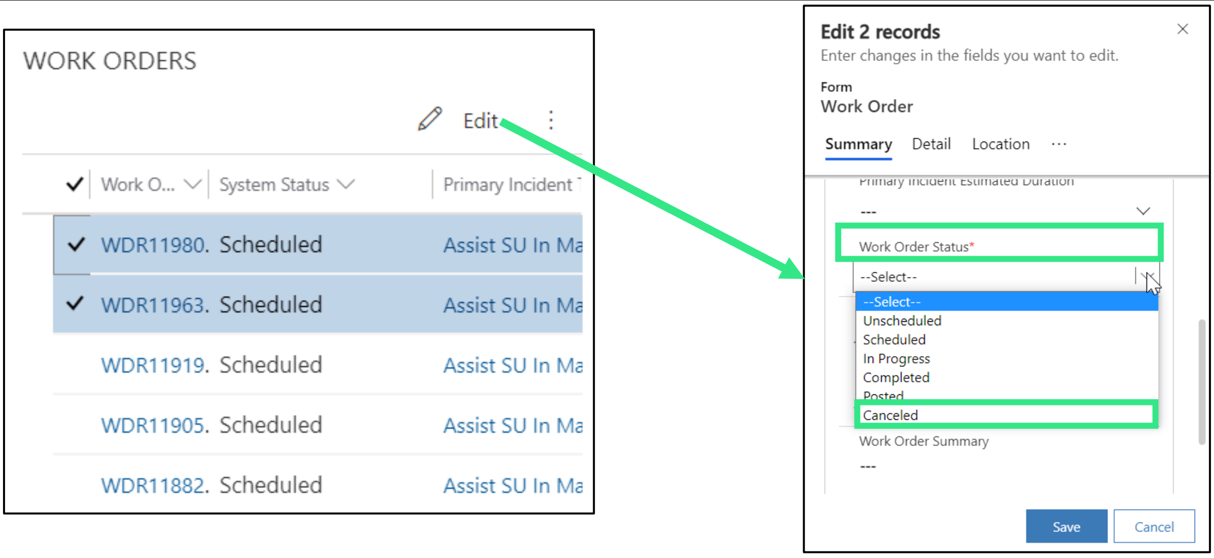

Figure 49. Temporarily suspending care plans by cancelling visits. Selecting the visits you want to cancel and then using [edit] to change their status to 'Canceled'.

The visits will now have a 'Canceled' status. Any booking to a time/resource should be cancelled, and display as cancelled on the schedule board.

ⓘ You can set the schedule board to hide cancelled appointments to make it easier to see HSW availability. If you select **[Settings]** on the top righthand side of the board it will display a menu. In the menu there is a toggle called 'Show canceled' – switching this toggle will either hide of display cancelled booking

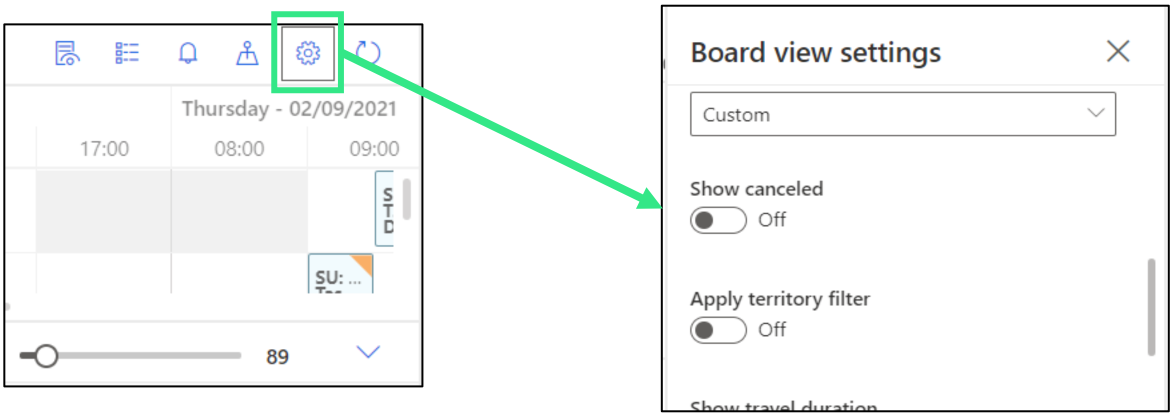

Figure 50. Changing the settings in the schedule board to hide cancelled bookings.

3.19 Terminate an agreement

△ The integration with mySWIS will allow Field Service to pick up changes to care plans so that if they are closed, you should not need to do this in Field Service

When a service user leaves Home Care you are able to close down the plan so that no further visits will be scheduled.

△ Do not complete this action unless you have been specifically advised to use Field Service to do this

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You can manually permanently suspend a care plan through the following steps:

1. Navigate to the Service view and then Agreements page
2. Select the agreement that you wish to cancel by selecting the reference number (e.g. AGR12345)
3. This will open up the agreement
4. In the 'General' tab change the status of the agreement from 'Active' to 'Canceled'
5. Select **[Save & close]**

⚠ You should also deactivate the SU account – use the following steps

6. Navigate to the Service view and then the Service Users page
7. Select the SU that you want to deactivate by clicking the far left of the row they are listed
8. At the top of the record a **[Deactivate]** button will appear – select it
9. This will open a dialogue box asking you to confirm – select **[Deactivate]**

This will cancel the agreement and cancel all associated bookings.

3.20 Send a SU an update for an appointment

You can send a basic update to a service user for a specific appointment using field service.

⚠ The communications preferences for a service user must be recorded, and they must either have their preference set to 'Text' or 'Email' to use this feature

⚠ The service user must have a mobile phone number or email recorded to use this feature

1. Open Schedule board page
2. Navigate the schedule board to find the appointment booking for which you want to send an update to the service user
3. Double-click the booking – this will open it in a new window
4. In the 'General' tab of the booking scroll down to the bottom
5. Select the toggle next to **[Notify customer]** so that it switches from 'No' to 'Yes'
6. Select **[Save and close]** to make sure the message is generated

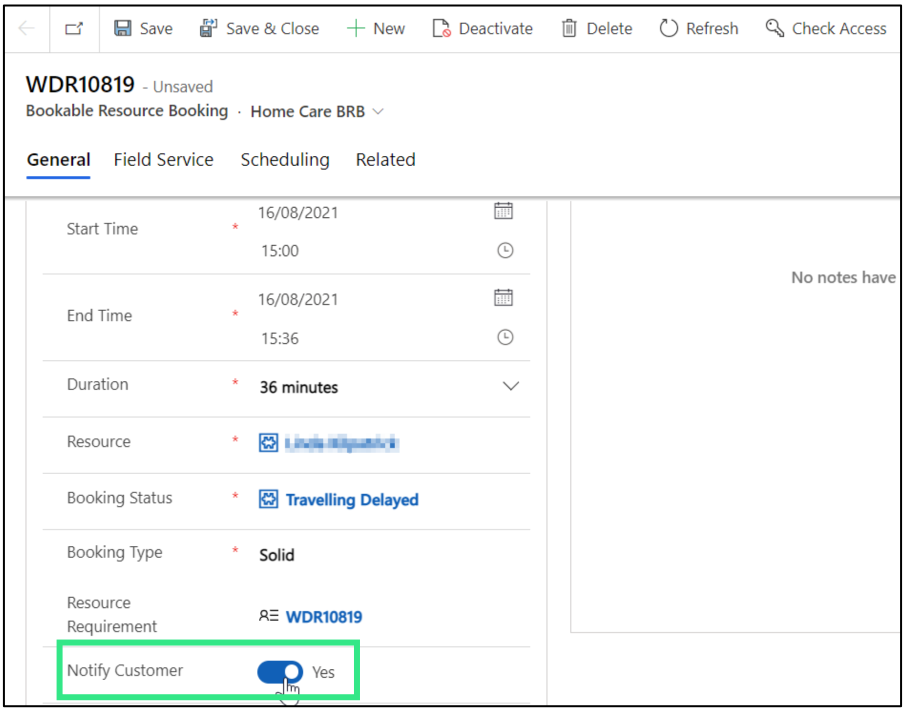

Figure 51. The toggle to select to prompt Field Service to send out a notification to the service user.

4 Using Field Services as a Home Support Worker

This section explains how a Home Support Worker can use Field Services to view their appointments, and log their visits.

ⓘ You will need to have set up your smartphone, NLC account and be assigned a suitable Dynamics license to do any of the following tasks – check that you have done these first

4.1 Getting started

1. Select the Play Store icon on your phone
2. Navigate through the list of apps and select Field Service (Dynamics 365) – this will open up a screen with information on the app
3. Select **[Open]** on the screen – this will present a login screen
4. Log in using your NLC Office 365 account credentials
5. You may also be asked to provide some additional verification details (e.g. questions and answers)

ⓘ If you are having difficulty logging in then call the IT service desk

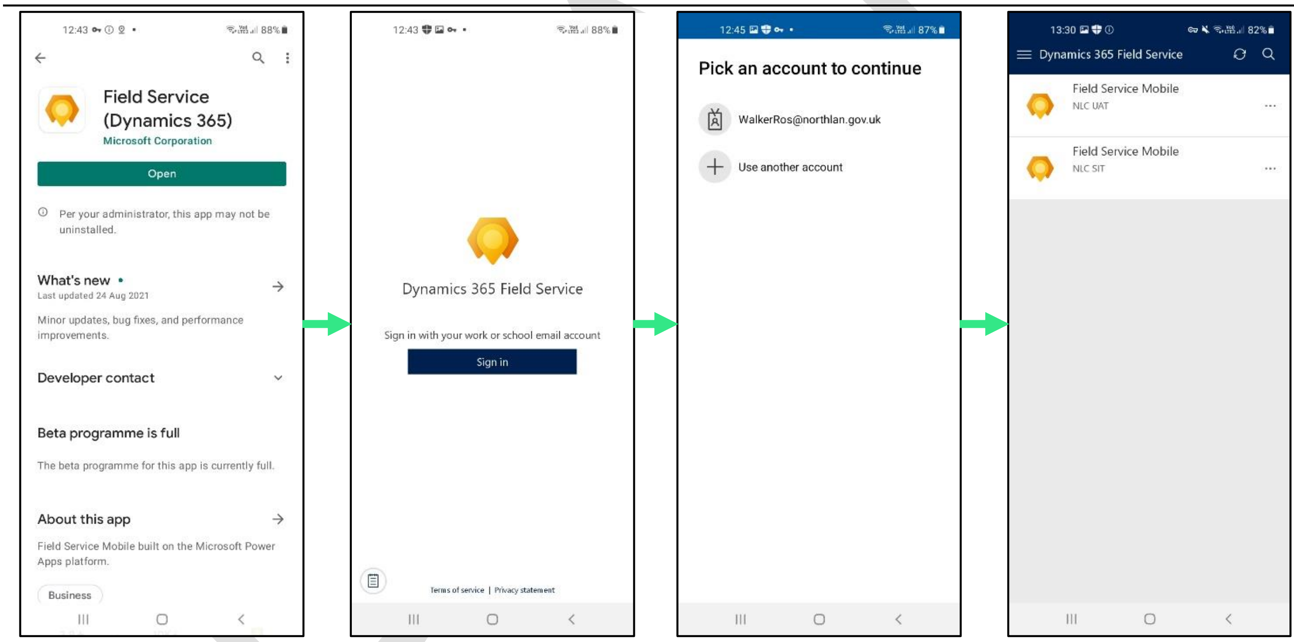

Figure 52. The screens that you'll navigate to open the Field Services app. (1) the app information page, (2) the login page, (3) it may present you with your account if you've already logged in

6. This may present you with options of different versions of the app to open – select 'Field Service Mobile'
7. The app will navigate you to the landing page

ⓘ You should only need to login when you first open the app or change your password. Every other time the app should open without requiring authentication

4.2 Viewing your schedule

1. Open the Field Service app on your phone
2. Log into the app using your NLC account credentials
3. The default home page should be a view of your schedule for today

ⓘ You can choose between an 'Agenda' view, a 'Day' view, and a 'Map' view

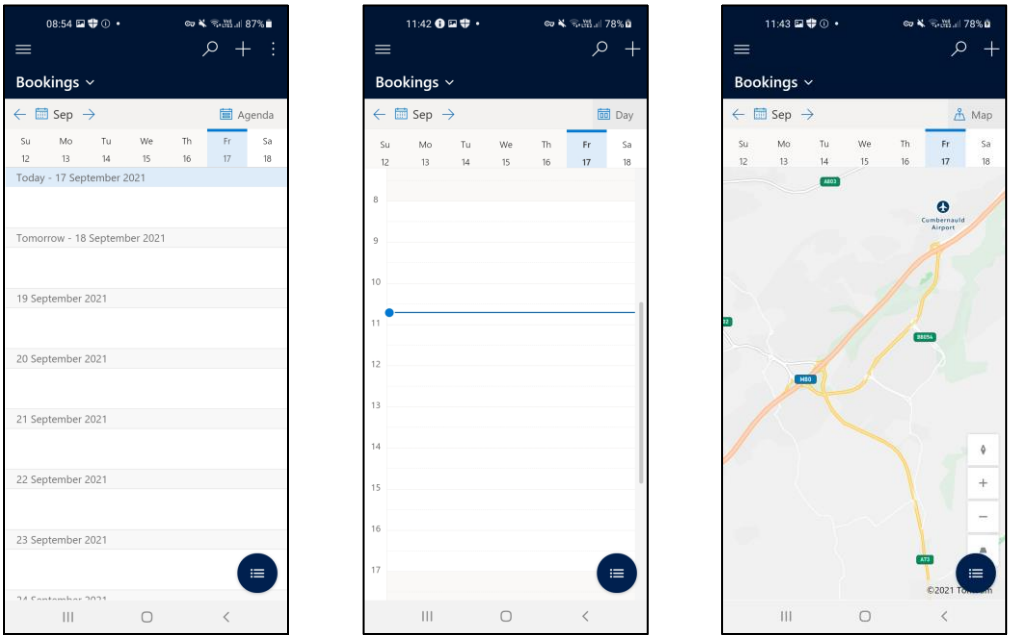

Figure 53. The Agenda, Day and Map views that you can choose to view your schedule.

4. To select the view you want press the icon in the top righthand corner (underneath the 'Bookings ᵛ' heading) – it may say 'Agenda', 'Day' or 'Map' next to an icon
5. This will present a dropdown list with Agenda, Day and Map view options – select the one you wish to apply

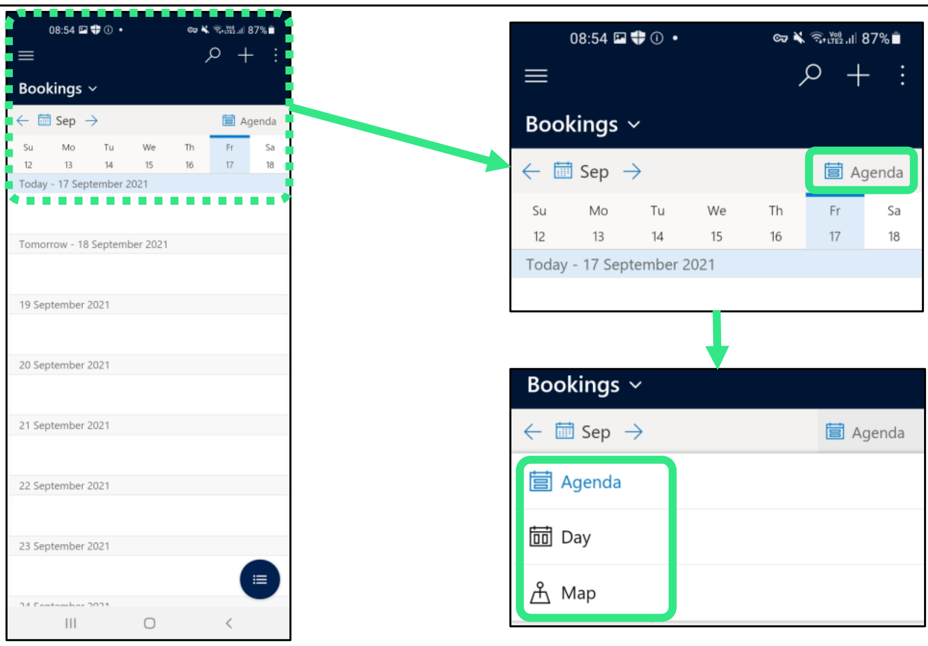

Figure 54. Changing the view. Screenshot 1 is the default 'Agenda' view.

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6. In the Agenda and Day views you can navigate to future and past days using the date buttons, the calendar icon and the '←' and '→' buttons

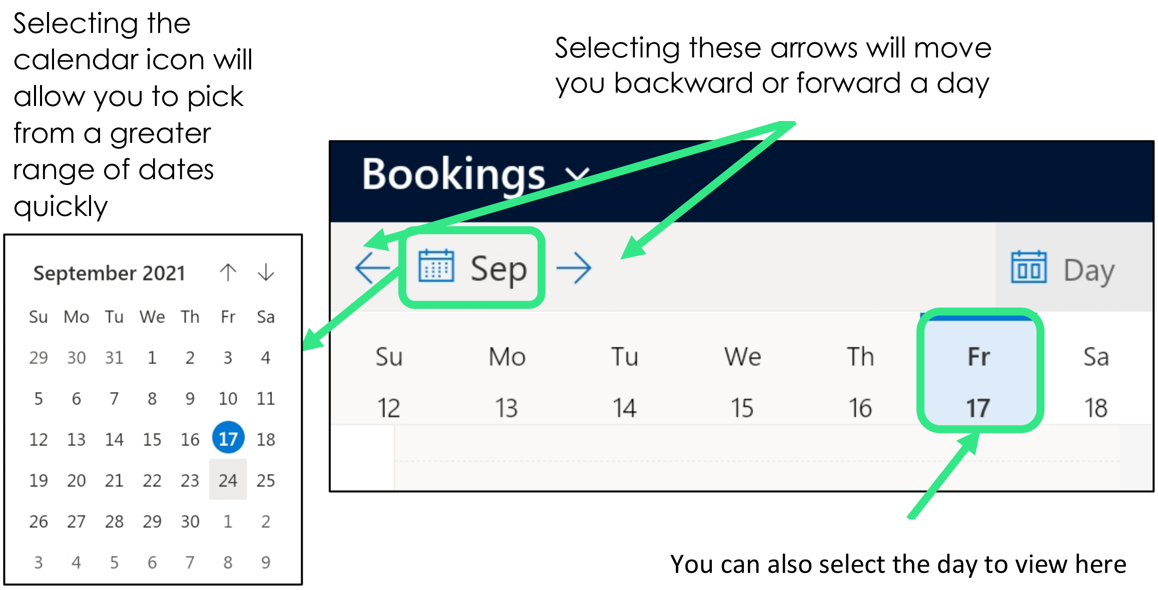

Figure 55. Options for navigating to different days in your schedule.

4.3 Viewing an appointment

1. When in the schedule navigate to the appointment you want to see – appointments will be displayed with a time, name of SU, task and their address
2. Select that appointment
3. This will open up a new view - from here you can view a range of information on the visit by using the tabs at the top

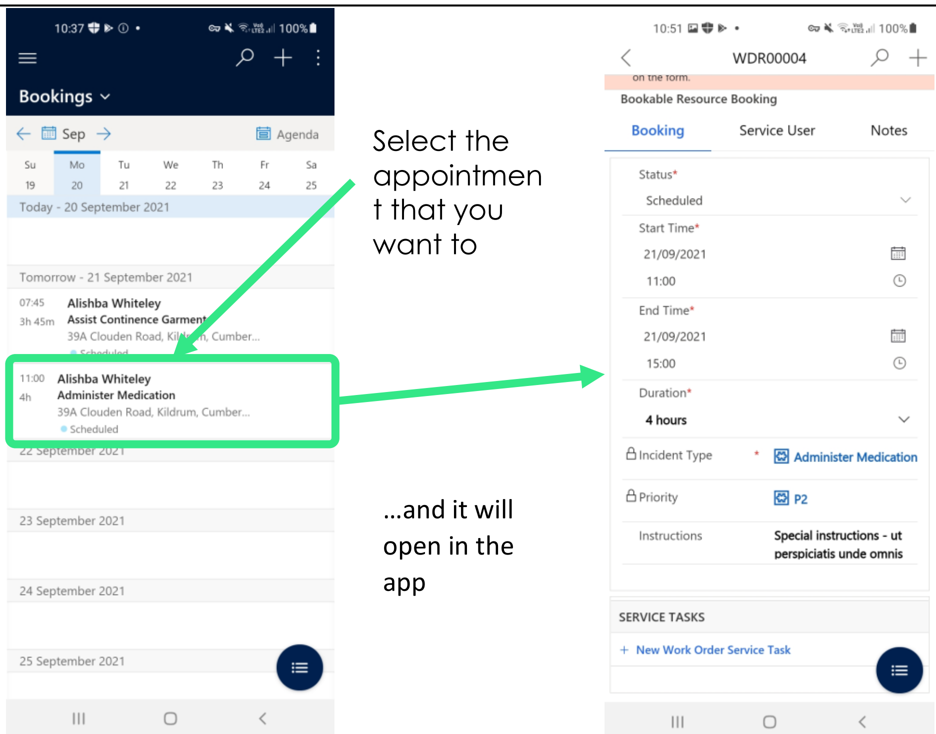

Figure 56. Opening up an appointment in the app.

ⓘ The tabs in the appointment each display a different set of information to do with the booking, the service user or any notes

4. If you want to see general information on the visit, including tasks to be completed go to the Booking tab
5. If you want to view information on the service user, including address, keysafe / medsafe details, and alerts then go to the Service user tab
6. If you want to record a note, or view previous notes then go to the Notes tab

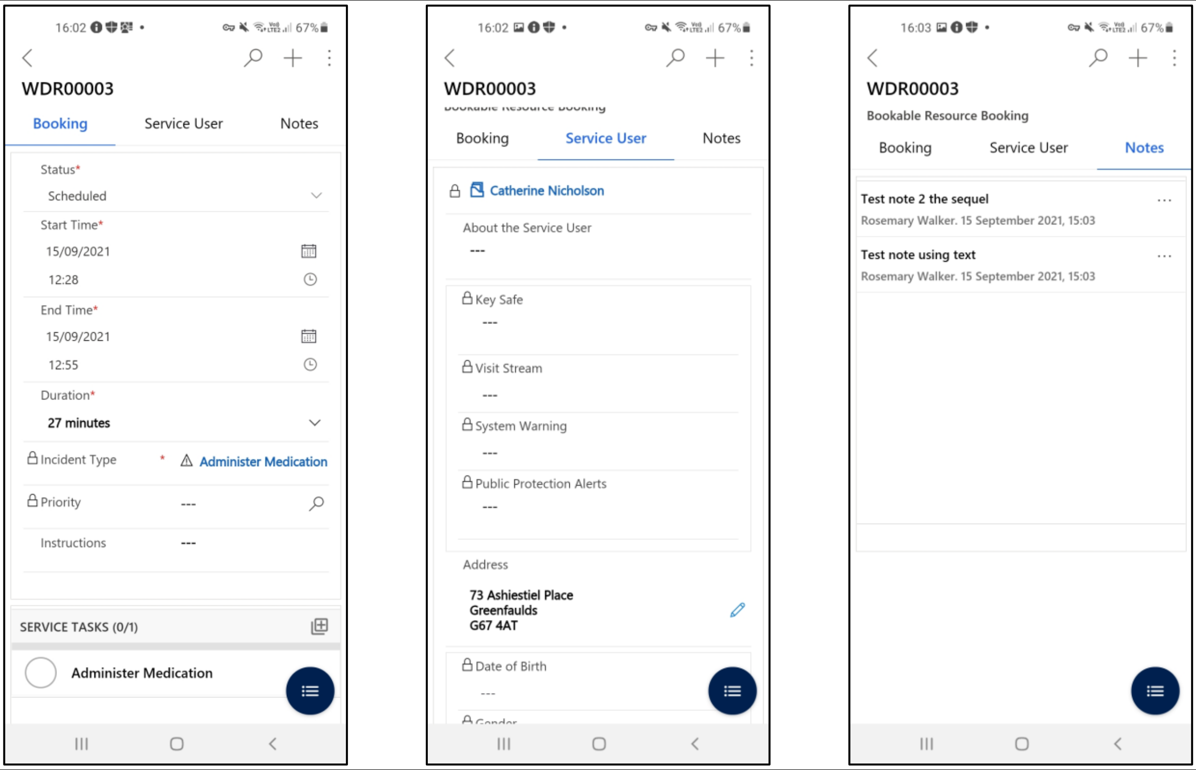

Figure 57. The different tabs that are available for an appointment in the app (from left to right) – Booking, Service User, and Notes tabs

4.4 Logging your progress

Field Service is different to what you've previously used as it allows you to record progress and log completion of your visits – this allows the service to see your progress and potentially re-schedule visits quickly, as well as having a record of care

1. To log a visit go to the appointment that you are about to travel to in the app's schedule view (see view an appointment)
2. In the Booking tab you should update the status of the visit by selecting the 'Status' field at the top – this will open a drop-down menu of options

ⓘ Changing the status field allows Support Officers to see whether you are on track to make visits – and arrange cover if it looks like you will be unable to make them.

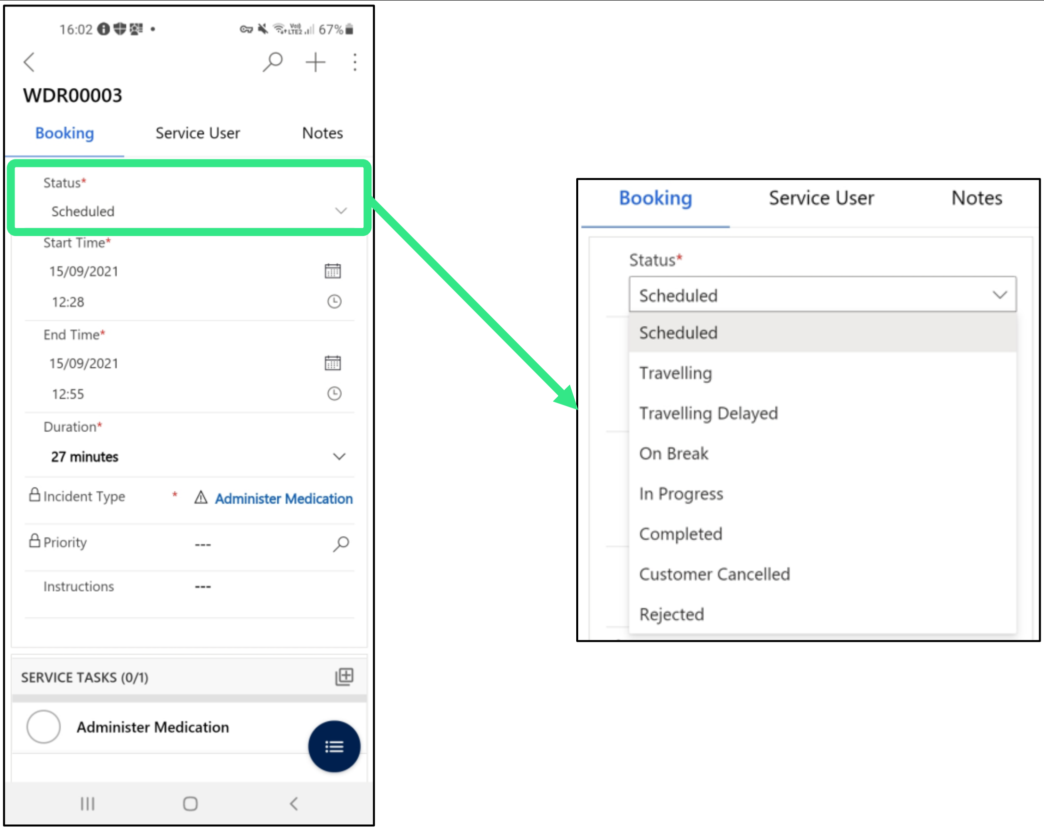

Figure 58. Changing the status of the visit

3. Pick the status that best reflects your progress – the table below shows which status you should use

Status	What it means / when to use
Scheduled	This is the default status setting – it means that the visit is scheduled
Travelling	You are on your way to the visit
Travelling Delayed	You are on your way to the visit but you expect to arrive late
On break	You are currently taking your break – you should not need to use this status as we will not schedule visits during your breaks
In progress	You are currently completing the visit – update to this status when you start the visit / enter the service user's home
Completed	You have completed the visit and are leaving the service user's home
Customer cancelled	This option should only be selected once you've checked the service user's home and talked to the office about the visit. The office may add this update on your behalf The service user is not at home or a carer/relative has informed you that they do not require the visit when you arrive
Rejected	Only use this option if there is a legitimate reason for you not to take this visit (e.g. you are a prohibited worker for this person or have a restriction

that means you are unable to carry out the visit. Contact the office before you use this update

ⓘ If you change the status you should select the **[Save]** or **[Save & close]** button before you close the visit so that your changes are saved (see below for instructions on how to do this)

4. When you have arrived at the service user's home and are carrying out care tasks you should log when you have completed them
   ⓘ Care tasks are listed on the Booking tab of the visit at the bottom

5. You can log a task as complete by selecting the circle (O) on the left on the task name – selecting a circle will turn it green to show it has been completed

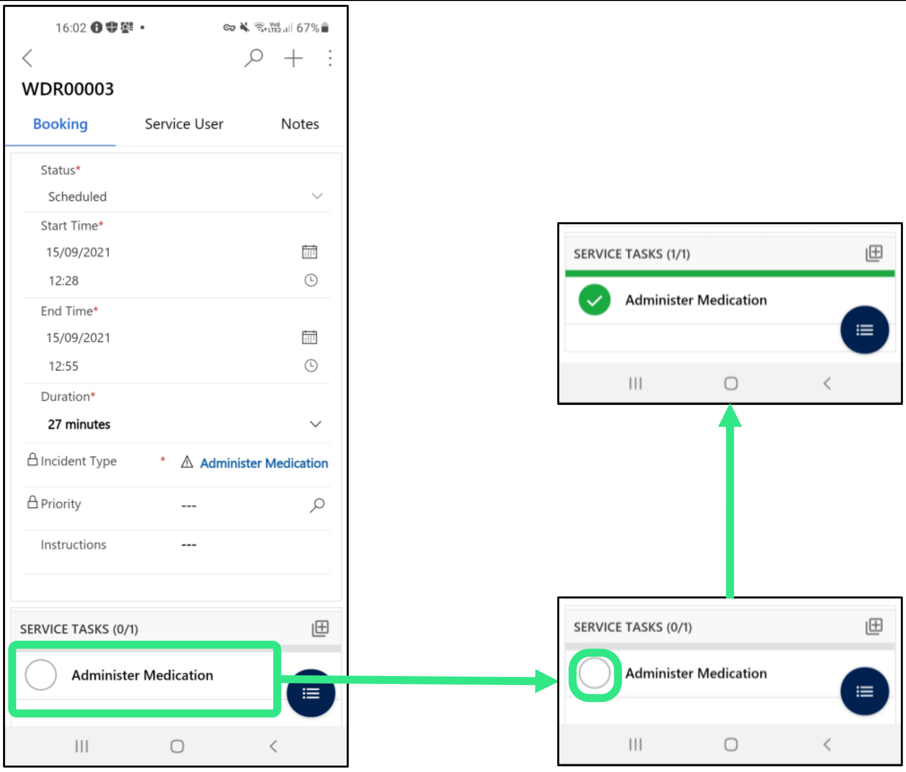

Figure 59. Logging the tasks completed during a visit

6. Once you've logged all tasks and you are finishing up you should change the status of the visit to 'Completed'
7. Select **[Save & close]** to make sure any information you've logged has been saved

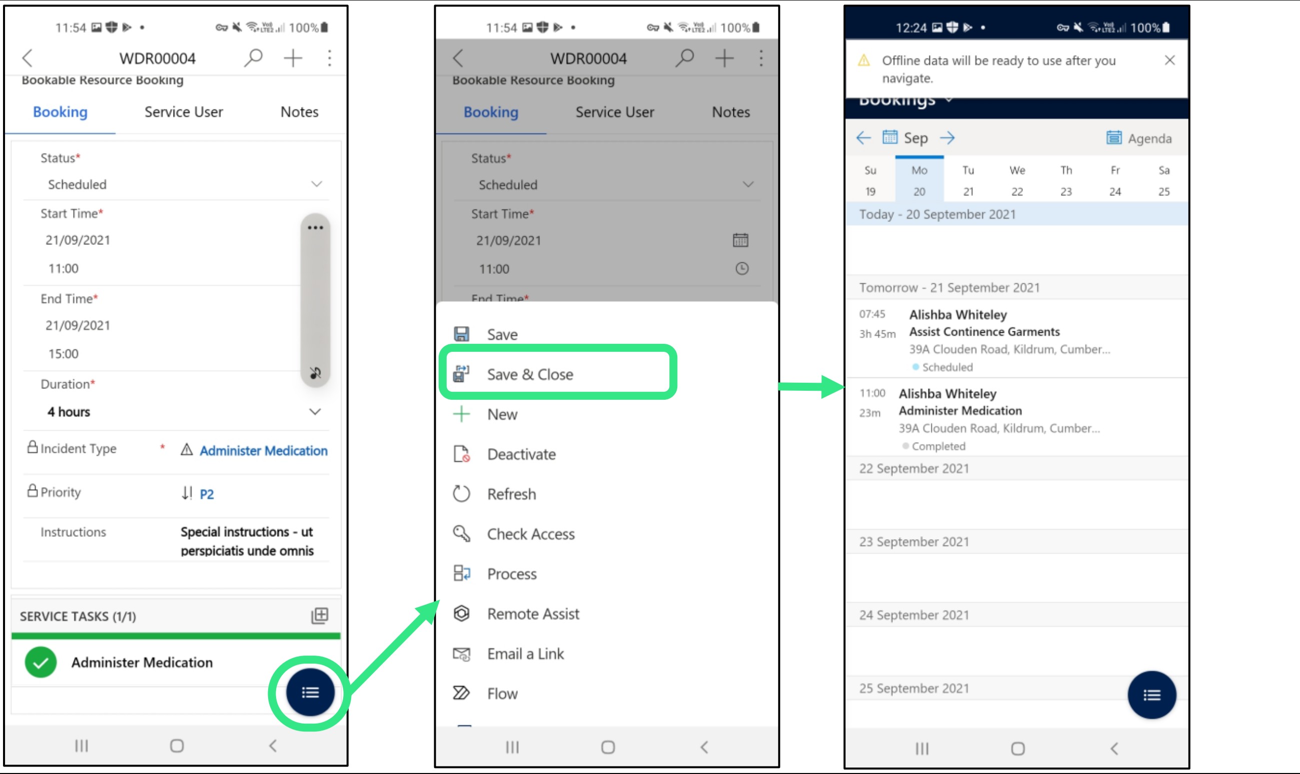

Figure 60. Saving your changes once you've completed a visit. The app will take you back to the schedule view once you have saved and closed.

4.5 Recording a note

Sometimes you may want to record a note about the visit. You can do this in the app through the following steps

1. Open the booking in your schedule
2. Navigate to the 'Notes' tab
3. At the bottom of the phone there should be a blue button with three dots and lines, in the bottom righthand corner of the screen – select this
4. It will display a menu of options – you can choose what media you want to use to record a note. **[Text]** will allow you to type a note. **[Photo]** will allow you to use the phone's camera to record an image. **[Video]** will allow you to record a video. **[File]** will allow you to attach a file.
5. Record your note

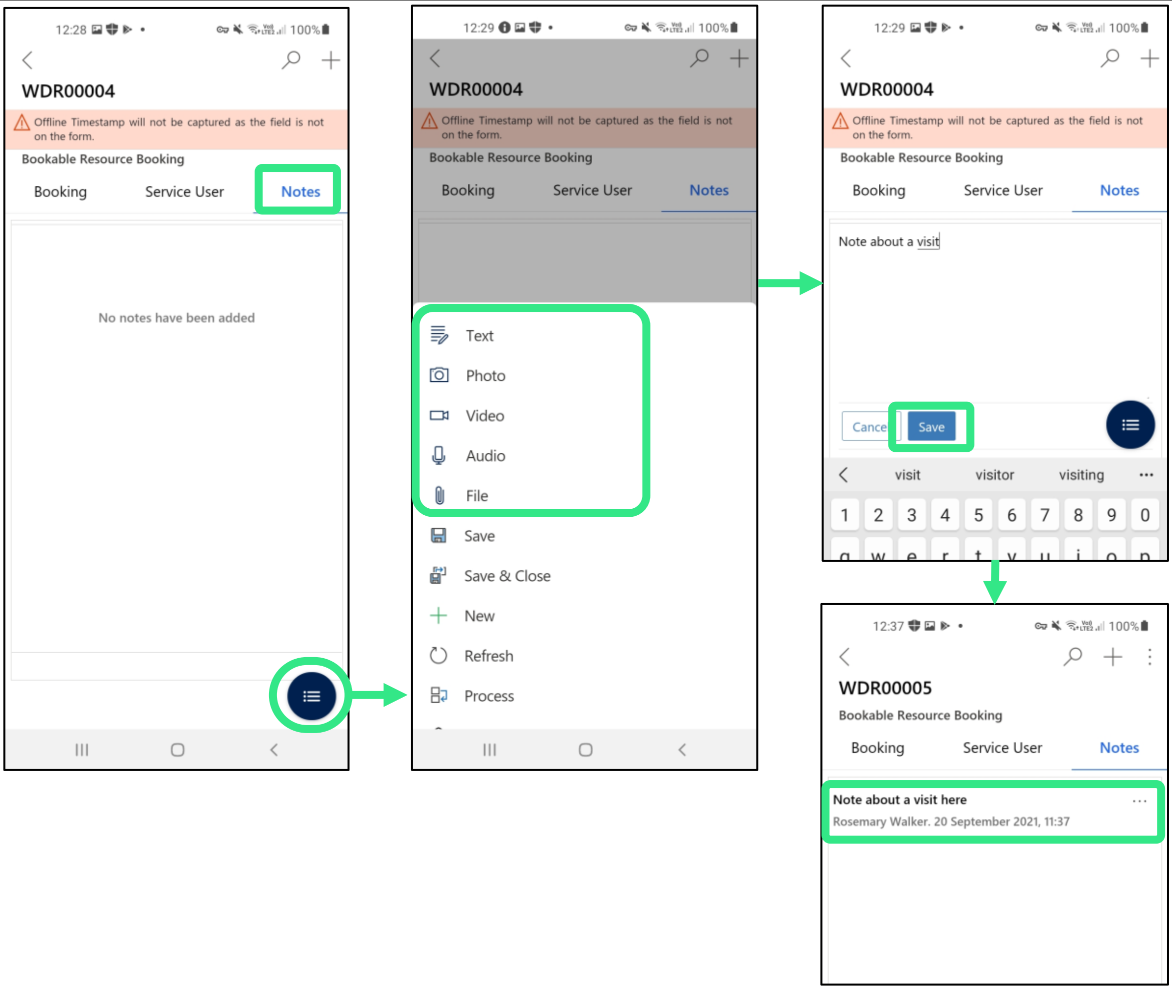

Figure 61. Recording a text note on a visit

6. Once you have recorded your note select the **[Save]** button – this should close the entry and the note should now appear in the Notes tab as an entry
7. Select **[Save & close]** from the menu once you have completed the visit

5 System administration

5.1 Retrieving an audit trail for a visit

You can review an audit trail of actions and changes made to a visit in Field Services through the following steps.

1. Open the visit you want to inspect by selecting in the either in the Bookings or Work orders view. Alternatively you can select it on the schedule board by double clicking it
2. Once it has opened, select the 'Related' tab at the top – this will present a dropdown menu
3. Select 'Audit history' – this will open an audit history tab
4. From here you can view changes and actions taken with this visit

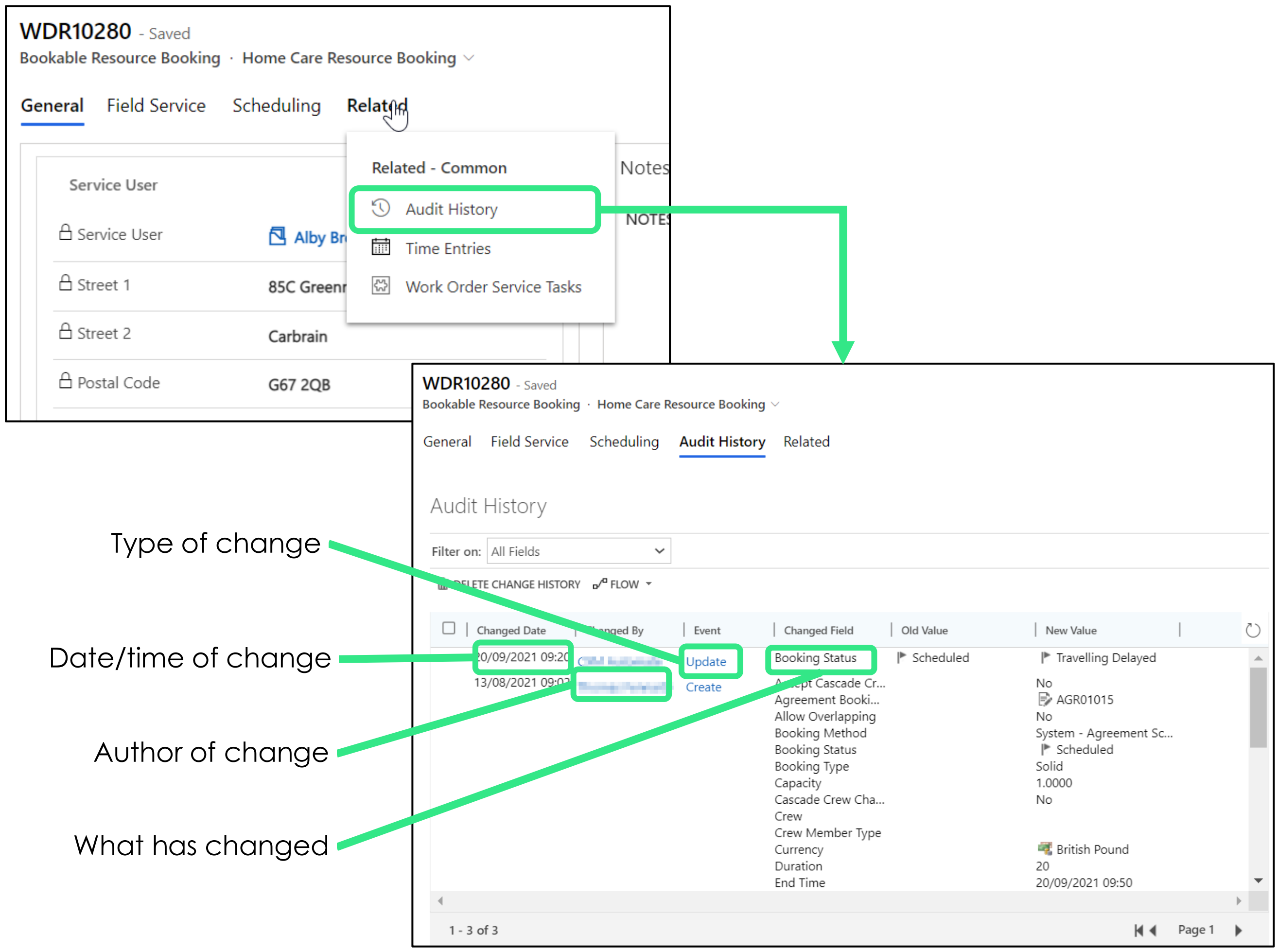

Figure 62. Opening the audit history for a visit.

6 Appendices

6.1 When to use Field Services and when to use mySWIS

During this pilot some actions will continue to be done in mySWIS or other systems. Others may need to be done in multiple systems. The table below shows what system you should use for each type of action – it is divided into activities for Support Officers and activities for HSWs.

6.1.1 Support Officer activities

Process / activity	FS	mS	Other	Comments
Create SUs	X	X		Set up SUs in mySWIS as you currently do, but press the **[Release Changes to FS]** button – this will feed into Field Service. You may need to add some extra information in Field Service (see below)
Update / remove SUs	X	X		Update SU records in mySWIS as you currently do but press the **[Release Changes to FS]** button. However you may also need to add information that isn't currently recorded in mySWIS (in a structured way) – this includes the following: • Preferences (see below) • Restriction characteristics (see below) • Comms preferences
Create SU Care Plan	X	X		Set up care plans / visits as you currently do in mySWIS **but follow the instructions on how to release these changes to Field Service** – this will feed into Field Service
Update / cancel SU Care Plan	X	X		Update care plans in mySWIS as you currently do but press the **[Release Changes to FS]** button.
Add a permanent worker for a visit	X			You will need to do this in Field Service in the relevant booking setup(s) within the agreement. During the pilot you should also update mySWIS for continuity
Service User Preferences	X	X		You may need to enter SU preferences in mySWIS as you currently do, but also re-key in Field Service
Create / update HSW	X	X	X	You will need to create new HSWs and update their records both in mySWIS (as you currently do) and in Field Service (see guidance in this document)
Delete HSW Details				This should not be required for the pilot. However if it is, you should do this in both mySWIS and Field Service (by deactivating the HSW record)
HSW Preferences / restrictions	X	X		You will need to record in both mySWIS and Field Service (see guidance in this document on how to complete)

Process / activity	FS	mS	Other	Comments
Edit HSW Work hours	X	X		You will need to do this in Field Services for HSW that are involved in the pilot
Absence Recording	X	X	X	Absence should feed in from iTrent. You should not need to record this in Field Service during the pilot unless iTrent is down for maintenance. See guidance in this document for instructions on how to record in Field Service
HSW Availability (HSW working, but not able to do visits)		X		You should record in Field Service by adding a booking in FS to block out the time
HSW Availability (Scheduled Breaks)		X		During the pilot any changes to break will need to be entered in both Field Service and mySWIS. You can add scheduled breaks when editing working hours
Suspend / reactivate care	X	X		Updates to care schedules will be fed into Field Service from mySWIS
Set preferred / prohibited HSWs for SUs	X	X		You will need to record in both mySWIS and Field Service during the pilot. See the guidance in this document for instructions on how to record in Field Service
Rescheduling	X			Reschedule visits in Field Service – see guidance in this document on how to do this
Monitoring visit completion	X			You can monitor visit progress in Field Service - see guidance in this document on how to do this
Updating SUs	X			You can send email and text updates to SU through Field Service – see guidance in this document on how to do this

6.1.2 Home Support Workers

Activity	FS	mS	Other	Guidance
Log visit completion	X		X	During the pilot you will need to update the paper log book and also log on the app - see guidance in this document on how to do this

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6.2 Fields that can be edited for a SU record

The tables below explain the fields that can be edited for a service user record.

6.2.1 Summary tab

The summary tab provides basic details of the service user. Below is a screenshot of this tab.

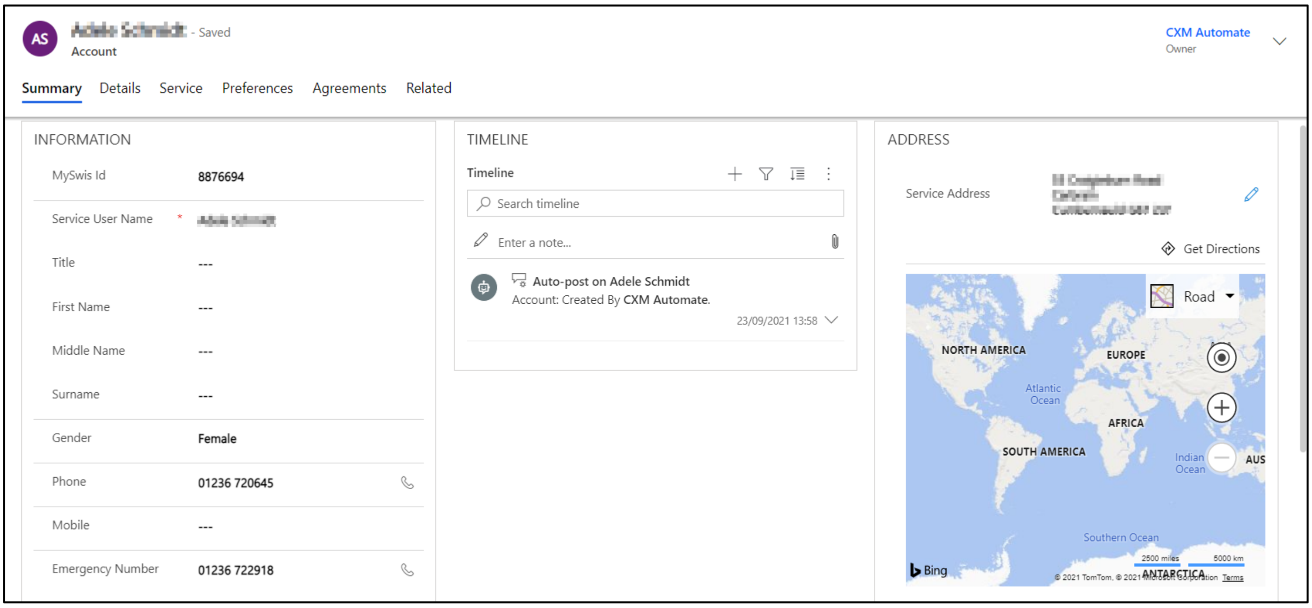

Figure 63. The Summary tab within a SU record.

Field	Guidance
INFORMATION	Basic information on the service user
MySWIS ID	This is the unique identifier for the service user in mySWIS
Service user name	The first name and surname of the service user
Title	Title of SU where recorded
First name	First name of SU
Middle name	Any middle name of SU (where applicable)
Surname	Surname of SU
Gender	Gender of the SU
Phone	The landline for the service user (or their carer if they are the designated point of contact)
Mobile	The mobile number (or carer's mobile number)
Emergency number	The number to contact if there is an emergency with the SU

Email	The email (or carer's email)
TIMELINE	The timeline shows a chronology of events relating to the service user such as booking alerts for appointments and communications sent to them
System warning	Any alerts relating to the SU
Visit stream	Type of care the SU receives (i.e. Intensive, reablement, etc.)
ADDRESS	Address and postcode for the service user – this will display on the map below this field

6.2.2 Details tab

This tab records details relating to characteristics and communications needs of the SU, amongst other attributes.

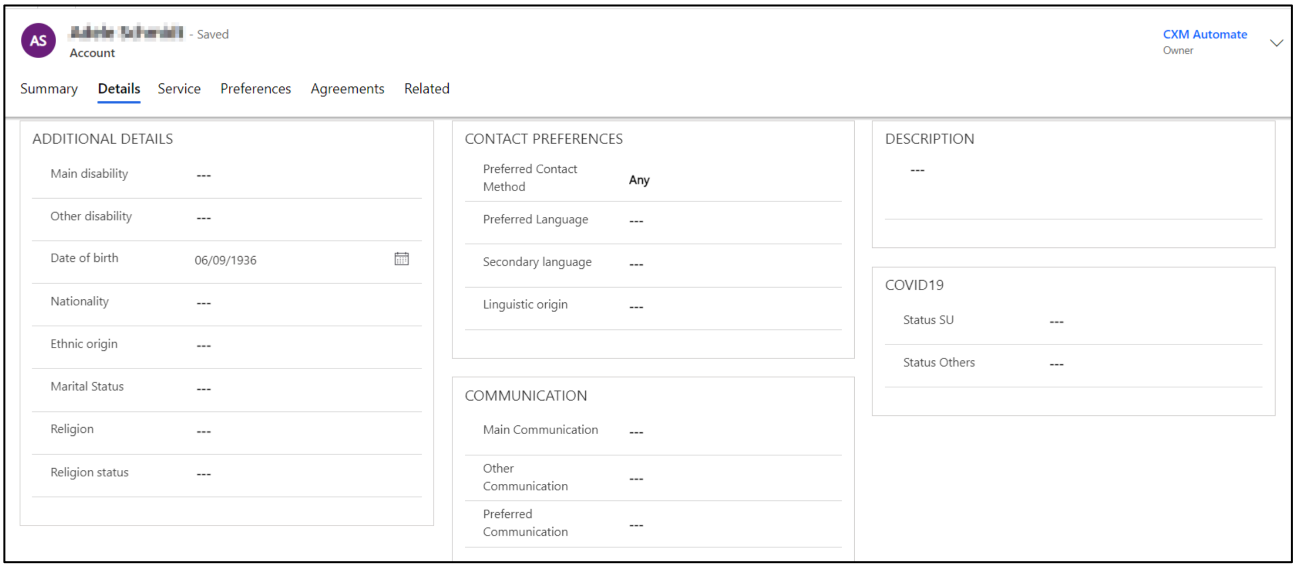

Figure 64. The Details tab within the SU record.

Field	Guidance
ADDITIONAL DETAILS	Most of this information will be populated from mySWIS, however some fields require input
Main disability	Main disability of the SU, if any
Other disability	Any other disability that the SU may have
Date of birth	Date of birth of the SU
Nationality	Nationality of the SU

Ethnic origin	Ethnic origin of the SU
Marital status	Marital status of the SU
Religion	Religion of the SU, where known
Religion status	
CONTACT PREFERENCES	This section details how the SU wants us to communicate with them
Preferred contact method	The field presents a dropdown menu of channels that can be set as preferred method – Mail, any, email, phone, text This determines whether field services send out a email or text when prompted
Preferred language	The preferred language of the SU
Secondary language	Any secondary language of the SU
Linguistic origin	
COMMUNICATION	Any specific communication needs that the SU has
Main communication	Any particular communication that the SU uses
Other communication	Any other communication that the SU requires
Preferred communication	The SU's preferred communication means
DESCRIPTION	This section can be used to record a biography for the SU which may help new HSWs engage them when they first visit
COVID 19	Alerts relating to Covid-19
Status SU	Whether the SU is reported as having Covid-19
Status others	Whether anyone else linked to the SU has Covid-19

6.2.3 Service tab

The service tab allows you to set restrictions relating to gender and other factors.

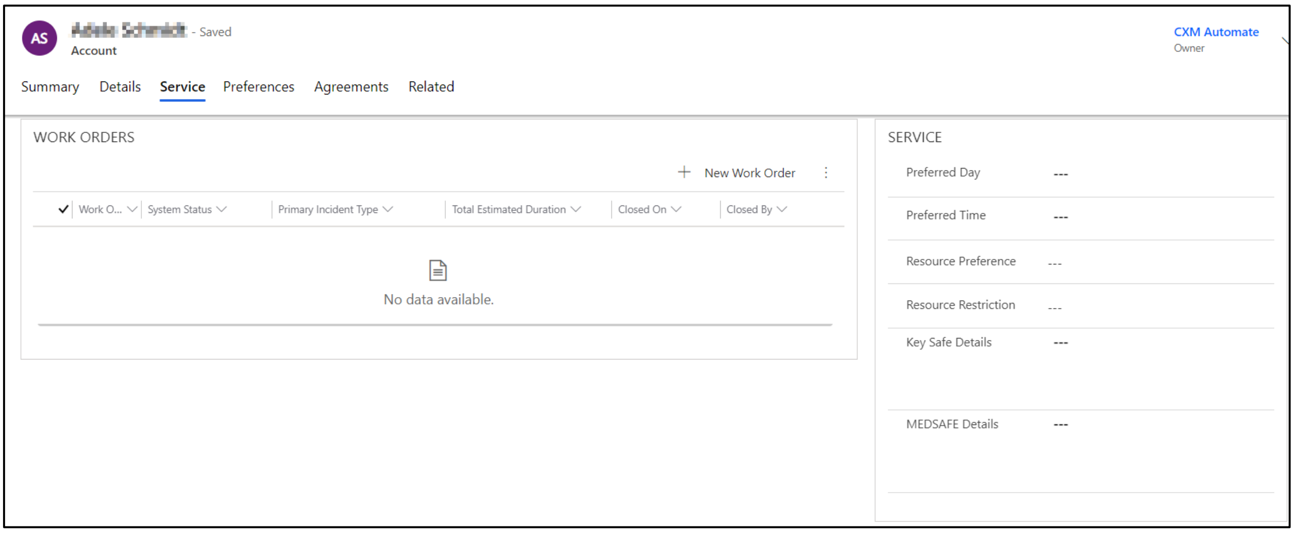

Figure 65. The Service tab within a SU record.

Field	Guidance
Preferred day	Generally not applicable
Preferred time	Generally not applicable
Resource preference	Whether the SU preferred male or female only HSWs
Resource restriction	Records where either the SU has pets or has lift access
Key safe details	Records any details required by HSWs to locate and open a keysafe
Medsafe details	Records any details required by HSWs to locate and open a medsafe

△ There are also 'Location' fields on this tab, however they should not be edited.

7 Revision History

Version	Date	Amended By	Summary of changes
0.1	02/08/21	Thomas Fennerty	New Document
0.2	10/08/21	Thomas Fennerty	New screenshots. Additional guidance on common operations.
0.3	13/08/21	Thomas Fennerty	Added guidance on login, additional screenshots Appendix section detailing steps to create new booking agreements
0.4	17/08/21	Thomas Fennerty	Added steps for creating agreements, details of SU fields that can be edited and screenshots
0.5	26/08/21	Thomas Fennerty	Added in sections on suspending care plans, cancelling care plans and multi-week shifts. Incorporated updated guidance for HSWs using corporate smartphone with Android O/S
0.6	06/09/21	Thomas Fennerty	Added in table advising staff what activities should be completed in which system during the pilot. Updated guidance to reflect links to mySWIS.
0.7	21/09/21	Thomas Fennerty / Mike O'Regan	Updates for changes to mobile app. New sections for toggling between schedule board views. New section for accessing audit history
0.8	04/10/21	Thomas Fennerty	Updates incorporating adding a permanent worker, updates to the SU record in the appendices, update to include the 'Rebook' function incorporating the 'New' schedule board view
0.9	19/10/21	Thomas fennerty	Notes on recording overtime and absence
0.10	25/10/21	Thomas Fennerty	Additional screenshots for overtime and absence
0.11	27/10/21	Thomas Fennerty	Changes to process for creating new agreements in mySWIS. Update the appendix table on what system to use for each typed of activity
0.12	29/10/21	Thomas Fennerty	Additional sections on cancelling visits. Updated instructions on terminating an agreement in Field Service

7.1.1.1.1 Document Approval

This document requires the following approvals. ('Approved' assumes review undertaken prior to approval).

Version	Date	Name	Title / Role	Approval Status (Pending/Approved)
1.0				
2.0				
3.0				
4.0				

7.1.1.1.2 Document Reviews

This document has been reviewed by the following people, in addition to those listed above.

Version	Date	Name	Title/Role
1.0			
2.0			
3.0			
4.0			

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