

CareLineLive – Visits Report

The **Visits report** provides a wealth of call-monitoring data. Please note, due to the amount of data generated, if the report is viewed within CLL, it shows limited information. However, exporting the report to excel provides access to much more data which can then be filtered / analysed as per differing requirements.

Distance data

In relation to gaining information about Care Worker check-in / checkout distance (from Service User's address), when the full report (as per below) is generated and then exported to excel:

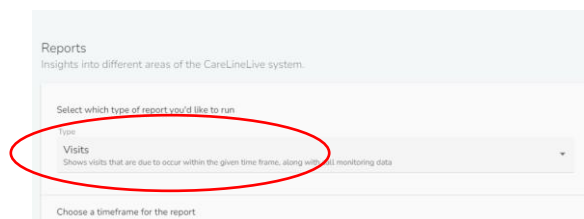
- columns AI & AJ shows arrival distance & accuracy
- columns AO & AP show Departure distance & departure accuracy

User guidance – How to generate a Visit Report

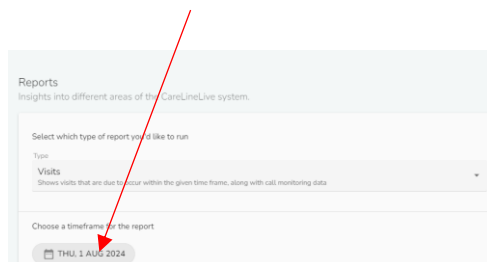
1. Select the team/s you wish to run the report on.



2. Select Reports from the Navigation panel (you will need to scroll down) on the left-hand side.
3. Select 'Visits' from the Type drop down menu.



4. Click on the date



5. Choose the time period that you wish to report on and click **select**.

A calendar interface showing July and August 2024. The date range '1 to 31 Jul 2024' is selected. The calendar grid shows days of the week (Mon-Sun) and dates. A red arrow points to the date '1' in July. Another red arrow points to the 'SELECT' button at the bottom right. Below the calendar are buttons for 'TODAY', 'YESTERDAY', 'THIS WEEK', 'LAST WEEK', 'THIS MONTH', 'LAST MONTH', 'THIS YEAR', and 'LAST YEAR'. At the bottom are 'X CLEAR', 'CANCEL', and '✓ SELECT' buttons.

6. Click on **View Report**.

A 'Reports' configuration form. It includes a 'Type' dropdown set to 'Visits' (with a description: 'Shows visits that are due to occur within the given time frame, along with call monitoring data'). Below is a 'Choose a timeframe for the report' section with a date range '1 TO 31 JUL 2024'. The 'Pick which teams to report on' section has a 'Team(s)' dropdown set to 'INTENSIVE EAST & DUNDONALD (PAULA)'. At the bottom, there are buttons for 'LATE VISITS', 'EARLY VISITS', 'DOUBLE-UP VISITS', and 'CHANGED VISITS'. A red arrow points from the 'VIEW REPORT' button at the bottom right to a note box. Another red arrow points from the 'VIEW REPORT' button to the 'Team(s)' dropdown.

Note, you can change the team/s that you are reporting on here also.

7. As the report is being prepared you can continue to work on CLL.

A report generation screen titled 'Visits'. It shows filters for 'Subject' (Clients) and 'Grouped By' (Subject (Clients)). Below are expandable sections for 'CLIENTS', 'CARERS', and 'BOOKINGS'. A timestamp 'Generated 10:25, 1st Aug 2024 (a few seconds ago)' and a 'REFRESH' button are present. The main area shows the date range '1 to 31 Jul 2024' and a message: 'We're currently generating your report in the background. Feel free to navigate somewhere else in the meantime - we'll notify you when it's ready!'. A loading spinner is visible.

8. Note: You can filter here, for example:
- a. Subject: specific Client or Carer,
and group by
 - b. Client or carer, date or week

Visits
Filters

INTENSIVE EAST & DUNDONALD (PAULA) 1 TO 31 JUL 2024

Subject: Clients Grouped By: Subject (Clients)

CLIENTS

CARERS

BOOKINGS

Generated 10:27, 1st Aug 2024 (2 hours ago) REFRESH

Once selected hit 'Apply Filter'.

Alternatively, you can run the report as is, and undertake all filtering within excel.

The larger the timeframe will obviously influence the size and therefore the length of time that it takes to run the report.

9. If the report is too big you will receive a message as below. You can view the report within CLL if you wish as indicated by the SHOW ANYWAY. However, the real value is when you open it in Excel.

Visits
Filters

INTENSIVE EAST & DUNDONALD (PAULA) 1 TO 31 JUL 2024

Subject: Clients Grouped By: Subject (Clients)

CLIENTS

CARERS

BOOKINGS

Generated 10:27, 1st Aug 2024 (a minute ago) REFRESH

1 to 31 Jul 2024

Report is too big to display on this page. SHOW ANYWAY

10. Click on the **download to excel** icon.

11. Open spreadsheet and apply filters / analyse as per requirements.

Remember: the CareLineLive online Help Centre is excellent. Please make use of it.

- *You can search for help using the purple question mark at the top of your screen.*



- *Or go directly to the Help Centre and search for help from there:*
[CareLineLive Help Centre](#)

This Section (blue background) is the guidance relating to Check Ins on the CLL Help Centre:

Check Ins

If the address is fine, looking at the following will give you an indication of why the arrival distance is not matching the clients address. If you look at the check in you will see:

- **Distance:** how far from the map pin, associated with the client's address, that the check in/out has been registered.
- **Accuracy:** how accurate the location is. For example, 20m means they are in a 20 meter radius of where the phone has reported it is. On the map this is reflected by looking at the green/red circles. The bigger the circles, the lower the accuracy. The location is taken using the phone's GPS signal at the time, if this is not available then it goes back to either WI-FI or mobile data to triangulate the device's location. The app tries its best to get an accurate location, and this can sometimes result in a 5 second delay while it is trying. The accuracy should also continue to update until the check in/out is confirmed.
- **Freshness:** X minutes before: how long before they pressed the check in/out button that the location was collected by the phone.

The greater the last two are, the less reliable the location is.

If you feel that the accuracy is correct of the location and the address is in the correct place, it could potentially mean that the carer was not at the clients address when they scanned the QR code and checked in. It has been known for carers to take a copy of the QR code, which they will then used to check in when they are not where they are supposed to be.

If you would like to rule this out as an option you may want to go to the clients profile and generate a new marker to be left at the clients house before removing and deactivating the previously used marker. You will get a notification if an older version of the marker had then been used to check in/out.