Haccpac Mobile Training & User Guide

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Preface

About this Training Guide

This training guide has been developed to supplement instructor led training for using the Haccpac Mobile application. This guide is intended to be used as a workbook during class and as a reference to use on the job.

This training guide includes several topics, each of which addresses a particular activity, task or scenario which may be encountered in the field. Each newly introduced topic builds on the information contained in previous topics. Space has been provided down the left hand side of the guide for notes.

Course Prerequisites

A basic understanding of mobile phone use is a prerequisite for this course. It is assumed that trainees are familiar with making calls and texting from the handset.

Introduction

Course Introduction

This course covers the use of the HTC Snap mobile phone with the Haccpac Mobile software.

Course Aim

The aim of the course is to enable Home Carers to manage their Home Care visit time and data recording within Haccpac Mobile (HPM).

Learning Outcomes

By the end of the course attendees should be able to:

- Understand the functions of HPM
- Understand key HPM terms
- Recognise the HTC Snap keys and how they are used within HPM.
- Unlock and lock the phone
- Charge the phone
- Log into HPM
- Navigate to the Weekly & Daily View
- Complete a job using HPM
- Add a job using HPM
- Cancel a job using HPM
- View the HPM job summary

Lesson 1 – Getting started

Lesson Objectives

After completing this lesson you will be able to:

- Turn your phone on.

- Turn your phone off.

- Lock and unlock your phone.

- Charging your phone.

Key Concepts

- Turning the phone on and off.

- Lock and unlock phone.

- Charging the phone.

Trigger

This process is initiated when you need to access HPM.

1.1 Walkthrough – Turning on and unlocking phone

This walkthrough shows you the steps to turn the phone on and off.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | Press and hold down the red phone (power button) for 1 to 2 seconds.

The words 'smart mobility' will be displayed, indicating the phone is turning on.

Step 2 | When the phone has turned on, the **Enter SIM PIN** screen will be displayed.

Enter your phone pin number using the number keys on the keypad. Click the **Done** soft key.

Result: The Phone **Home** page is displayed.

1.2 Walkthrough – Locking/unlocking your phone

This walkthrough shows you the steps to lock or unlock the phone.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 You may like to lock your phone when it is in your pocket or not being used. This avoids accidental calls etc. To lock your phone, press the Q/ padlock symbol key until the word 'Unlock' is displayed on the bottom left of the screen.

Step 2 When you want to use the phone again, press the left soft key to unlock.

Step 3 Enter your phone PIN and press the left soft key to unlock.

Result: The start and contacts menu will be displayed at the bottom of the screen.

1.3 Walkthrough – Charging the phone

This walkthrough shows you the steps to charge your phone.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 Find the battery and signal strength symbol which is displayed on the top right of the screen.
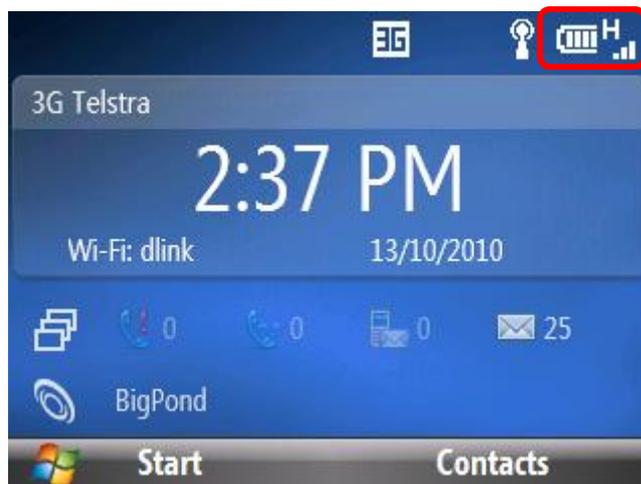
Step 2 Less bars indicates less signal or battery power.

Step 3	To recharge the phone, open the charger cover on the right side of the phone.
Step 4	Plug the cord into the port on the phone and into the power point or car charger.
Step 5	An orange light at the top left of the phone will be displayed. This light will turn green when fully charged.

	Tip
	• Your phone can be charged when it is turned on or off.

1.4 - Walkthrough – Turning the phone off.

This walkthrough shows you the steps to turn your phone off.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1	Press the red phone symbol and hold.
	Result: A message will be displayed confirming you wish to turn the phone off.
Step 2	Press the **Yes** soft key.
	Result: The phone will turn off.

Learning Check

1. What does an orange light at the top left corner of the phone mean?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- Turn your phone on.
- Turn your phone off.
- Lock and unlock your phone.
- Charging your phone.

Lesson 2 – Logging into HPM

Lesson Objectives

After completing this lesson you will be able to:

- Log into HPM.

Key Concepts

- Navigating to the HPM application
- Logging into HPM.

Trigger

This process is initiated when you need to use HPM.

1.1 - Walkthrough – Logging into HPM

This walkthrough shows you the steps to log into HPM.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1

Press the ⊚ button at the bottom right of the keypad.

Result: Four coloured balls will rotate and the HPM login screen will be displayed.

Step 2

Complete the following fields:

- Username.

- Password.

When complete press the **OK** soft key.

	Tips
	• Use the trackball to move between **User name** and **Password**. • If you make a mistake, the ← key will delete what is in the field. • Holding down the **CAPS** ⇧ key will allow uppercase entry. • Holding down the **FN** (function) key will allow you to enter numbers in the **User name** field. **Note**: The **Password** field allows number entry without having to hold down the **FN** key.

Step 4 Messages to the Carer will be displayed.
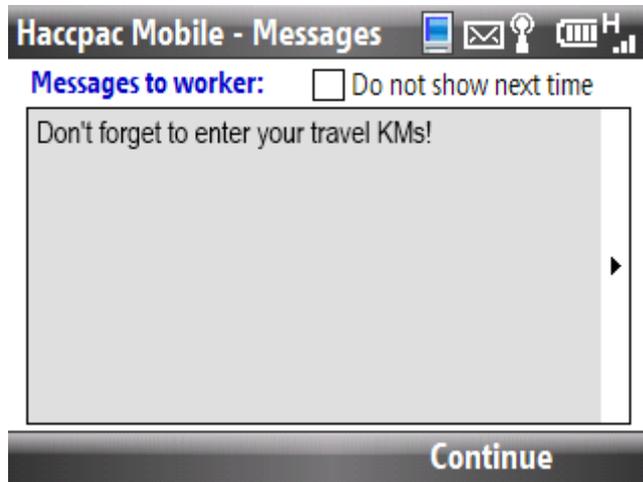
Result: You are now logged in to HPM.

	Tips
💡	• Messages to the carer are updated each time the phone is synced for the roster period. Once you have read the messages you can select to not have them display by ticking the box in the top right of the screen.

Learning Check

1. How do you launch HPM?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- Log into HPM.

Lesson 3 – Navigating to the weekly & daily view

Lesson Objectives

After completing this lesson you will be able to:

- Navigate to the Weekly View for a desired date.
- Navigate to the Daily View for a desired date.

Key Concepts

- Navigation within HPM.
- Familiarisation of HPM look and feel.

Trigger

This process is initiated when viewing, completing, adding or updating jobs.

1.1 Walkthrough – Navigating to the weekly roster view

This walkthrough shows you how to navigate within HPM.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | After logging in, review any messages and press the **Continue** soft key.

Step 2	Using the track ball, you can track left or right to select the **Week beginning** date for the roster week you wish to view.
	Result: The HPM **Weekly View** is displayed. This view includes week day, date, time of first job and number of jobs rostered for that day.

Step 3	Using the trackball, highlight the day of the week to view and click.
	Result: The HPM **Daily View** is displayed. The view includes the job status, rostered start and end time, and Client details.

	Tips
	• Status Key:
	    o S = Started
	    o C = Completed
	    o X = Cancelled

| **Step 4** | Return to the weekly view by selecting the **Weekly View** soft key. |

Learning Check

1. How do you select the day to view from the Weekly view?

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2. What does an **S** in the **St** column in the Daily View mean?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- Select the weekly roster date.
- Navigate to the roster Weekly View.
- Navigate to the roster Daily View.

Lesson 4 – Completing a job

Lesson Objectives

After completing this lesson you will be able to:

- Navigate to a job.

- Start a job.

- Add travel and shopping KMs to a job.

- Stop a job.

- Verify a job.

- Know what to do if you forget to start or stop a job.

- Request overtime approval

- Make a phone call using your phone.

Key Concepts

- Starting a job.

- Adding KM information to a job.

- Stoping a job.

- Verifying a QR code.

- Making calls with the phone.

Trigger

This process is initiated when undertaking a home care job.

1.1 Walkthrough – Completing a job

This walkthrough describes the steps to complete a job using HPM.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | Navigate to the HPM **Daily View** for the required date.

Step 2	Using the trackball, select the job you wish to start.

Check the client matches the selected job and read any associated notes.

Step 3	Start the job by pressing the **Start Job** soft key.

Using the number keys, enter the **Travel KMs** for this job (if any).

Using the number keys, enter the **Travel time (mins)** for this job (if any).

Press the **Continue** soft key.

Result: The HPM **Job View** is displayed with a Status of **Started** together with the time job was started.
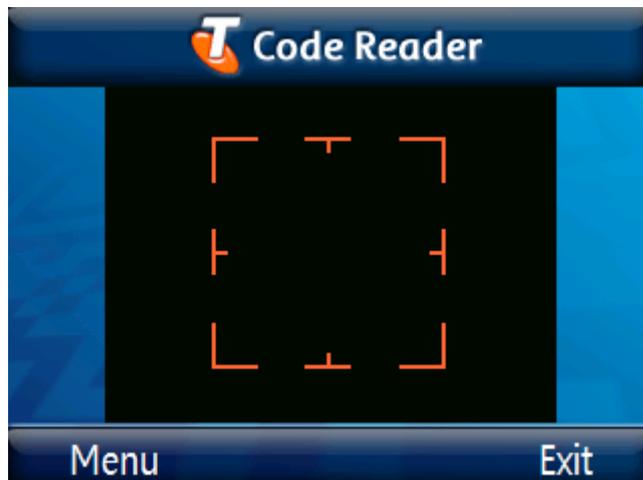
	Tips
💡	• You don't need to hold down the FN (Function) key to enter numbers in the **Travel KMs** or **Travel Time** fields. • If there are no KMs or travel time to be entered, leave the fields blank and click Continue. • If you click Continue and forget to add KMs or time, complete the amendment form to advise the HACC Team of details. • Once a job is started, you may like to 'lock' your phone before putting it in your pocket or bag. When returning to HPM, unlock your phone and press the ← key to return to the started job.

Step 4 When the job is complete, return to the job within HPM and press the **Stop Job** soft key.

Result: The QR Code reader will be displayed.

Step 5 Hold the phone up to the QR code for the client.

Result: The phone will 'chime' and the QR code will be collected. The client reference will be displayed on the screen.

Press the **Back** soft key.

Press the **Exit** soft key to display the HPM **Confirm Job** screen.

	Tips
💡	• If you cannot collect the QR code, press **Exit** and select a non verification reason (more on this later!)

Step 6	Using the keypad, enter **Shopping** or **Extra** KMs as required.

	Tips
	• You don't need to hold down the FN (Function) key to enter numbers in the **Shopping KMs** or **Extra KMs** fields.

Press the **Verify** soft key.

The job is displayed with a status of **Verified**, together with the time.

Step 7	The job is now complete.

1.2 Walkthrough – Forgot to start or stop a job

This walkthrough shows you what to do if you forget to start a job.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | You realise you forgot to start or stop the job in HPM.

	Tips
	• If you realise within 7 mins of the actual start or stop time of the job you can start or stop the job and continue as normal.

Step 2 | Using the trackball, select the job you wish to start.

Check the client matches the selected job and read any associated notes.

Step 3 | Start the job by pressing the **Start Job** soft key.

Using the number keys, enter the **Travel KMs** for this job (if any).

Using the number keys, enter the **Travel time (mins)** for this job (if any).

Press the **Continue** soft key.

Result: The HPM **Job View** screen is displayed with a Status of **Started** together with the time the job was started in HPM.

Step 4 | When the job is complete, return to the job in HPM and press the **Stop Job** soft key.

Result: The QR Code reader will be displayed.

Step 5 | Do not verify the clients QR code. Instead, press the **Exit** soft key to display the **Confirm Job** screen.

Step 6	Using the number keys, enter **Shopping** or **Extra** KMs as required. Select the **Verify** soft key. You will be prompted to select a **Non Verification Reason**. Select – **Forgot to start job** or **Forgot to stop job** (whichever applies).

	Tips
	• You can scroll through the list of selections by rolling the trackball to the right. • You can display the entire list of available selections by clicking the trackball. To select an item, highlight the item and press the **Done** soft key.

Step 7	The selected reason will be displayed in the Non Verification Reason box. Press the OK soft key.
Step 8	The job status is **Ended**, together with the time.
Step 9	You should then advise the HACC Team of the actual start or finish time of the job by completing the details on the amendment form provided.

1.3 Walkthrough – Request overtime approval

This walkthrough shows you how to request overtime approval.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Note: In practice, you would have already started the job overtime approval is required for. To simulate the process, we will start a job in HPM.

Step 1	You realise that there is a need for overtime at the current job and need to call the HACC Team to request approval.
Step 2	Press the **Home** soft key to return to the home screen.
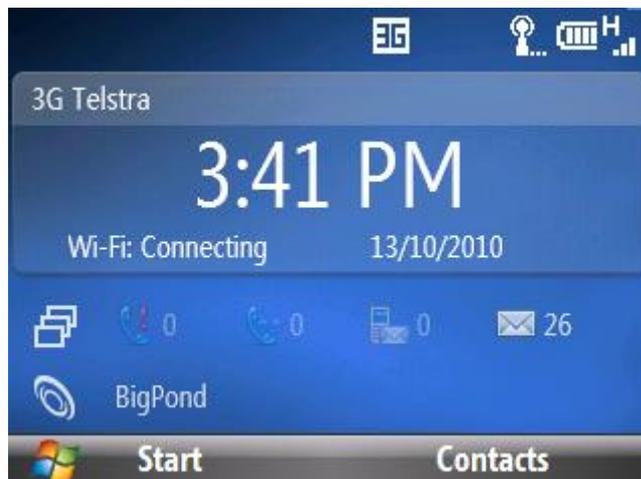
Step 3	Press the **Contacts** soft key to display the contacts list. Use the trackball to scroll down the list to the HACC Team contact.

	Tips
	• You can also type HACC and the list of contacts will be filtered as you type.

Step 4	Press the trackball to select the contact. When the contact is displayed select the number, e.g. office, which you wish to call.
Step 5	To call, click the green phone button. Talk to the HACC Team to request overtime approval. To end the call, click red phone button.
Step 6	Complete the job as usual, adding extra time if approved.

Learning Check

1. What do you do if you forget to add your KMs or travel time?

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2. How do you know that a QR Code has been captured?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- Navigate to a job.

- Start a job.

- Add travel and shopping KMs to a job.

- Stop a job.

- Verify a job.

- Know what to do if you forget to start or stop a job.

- Request overtime approval

- Make a phone call using your phone.

Lesson 5 – Adding and cancelling jobs

Lesson Objectives

After completing this lesson you will be able to:

- Cancel a job in HPM.

- Add a job in HPM.

- Update a job in HPM.

Key Concepts

- Cancel a job and record cancellation reason.

- Add a job in HPM with the correct client, codes, planned start and finish times for a future day and time.

- Update jobs in HPM using the cancel and add job functions.

Trigger

This process is initiated when a rostered job within the roster period needs to be cancelled, updated or added to the roster on the phone.

1.1 Walkthrough – Cancel a job

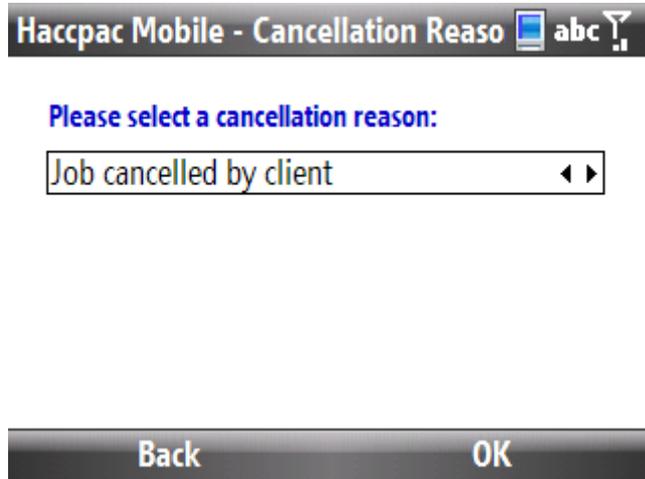This walkthrough shows you how to cancel a job in HPM.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | Locate and select the job in HPM you have been advised to cancel.

Step 2	In the HPM Job View, use the trackball to move to the **Status** field and select **Job Cancelled**. **Result**: The **Cancellation Reason** screen is displayed. Haccpac Mobile - Cancellation Reaso 📱 **abc** 📶 **Please select a cancellation reason:** Job cancelled by client ◄ ► **Back** **OK**
Step 3	Move the track ball to the right or left to select the cancellation reason. <table><tr><td>💡</td><td>**Tips** - You can scroll through the list of selections by rolling the track ball to the right. - You can display the entire list of available selections by clicking the track ball. To select an item, highlight the item and press the **Done** soft key. </td></tr></table>
Step 4	The selected cancellation reason will be displayed in the Cancellation Reason field. Press the **OK** soft key.
Step 5	Press the **Back** soft key to return to the Daily View or click the **Home** soft key to return to the Weekly View.
	## 1.2 Walkthrough – Adding a job This walkthrough shows you how to add a job in HPM Follow along as your facilitator demonstrates. If you have any difficulties please ask your facilitator for assistance.
Step 1	Navigate to the HPM **Weekly View**.
Step 2	Press the **Add New Job** soft key.

Step 3	The **Add New Job** screen will be displayed.
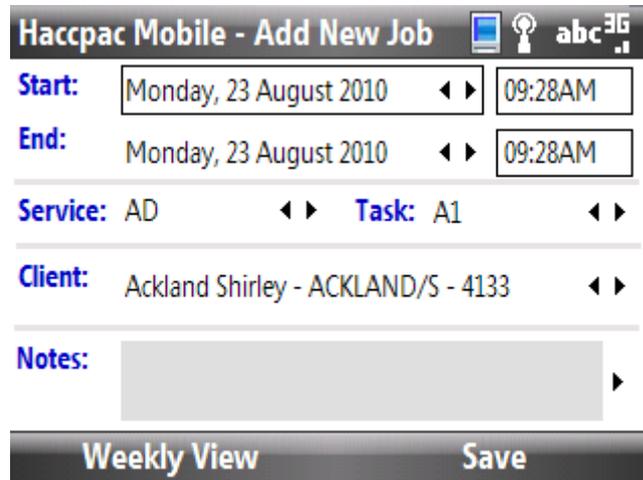
Select the **Start** date by scrolling left/right with the trackball. Scroll down with the track ball to move to the start time field. Hold down the **FN** (Function) key to enter numbers to adjust the time.

	Tip
💡	• To select AM or PM press A or P on the keypad.

Step 4	Complete the **End** date and time for the new job as above.
Step 5	Use the trackball to move to the **Service** field. Using the trackball, select the service code for the job.
Step 6	Use the trackball to move to the **Task** field. Using the trackball, select the task for the new job.
Step 7	Use the trackball to navigate to the **Client** field. Using the trackball, select the client.

	Tips
💡	• Press the first letter of the client's surname to go to the first client whose surname begins with that letter. • Click the trackball when in the Client field to display the full list of clients. • Clients are in alphabetical order by last name. If you want to find a client at the end of the client list, scroll left using the trackball to start at the Z names.

Step 8	Verify the details you have entered and if they are correct, save the new job by pressing the **Save** soft key.
Step 9	The HPM **Weekly View** is displayed. The number of jobs for the day on which the job was added will have increased by 1. To double check the added job, navigate to the Daily View.

1.3 Walkthrough – Updating a job

This walkthrough shows you how to update a job in HPM

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Scenario: A job has been rescheduled from 9am to 4pm.

Step 1	Add a new job to HPM, completing the required details (start time of 4pm).
Step 2	Cancel the 9am job and enter cancellation reason 'Job rescheduled'.

Learning Check

1. If you can't change the time for a job that you are adding, what might be the cause?

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2. How can you view a list of all available service codes when adding a job?

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3. How do I change the time of the job?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- Cancel a job in HPM.

- Add a job in HPM.

- Update a job in HPM.

Lesson 6 – Viewing the HPM Job Summary

Lesson Objectives

After completing this lesson you will be able to:

- View the HPM Job Summary.

Key Concepts

- Navigating and viewing the HPM Job Summary.

Trigger

This process is initiated when a carer would like to view the job summary data for the roster period.

1.1 - Walkthrough – View HPM summary

This walkthrough shows you how to view the HPM Job Summary.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1 | Select the **Week beginning** date for the summary period you wish to view.

Step 2 | Select the **Daily View** for any day within the period.

| **Step 3** | Press the **Summary** soft key. |

Result: The **Summary** Screen will be displayed.
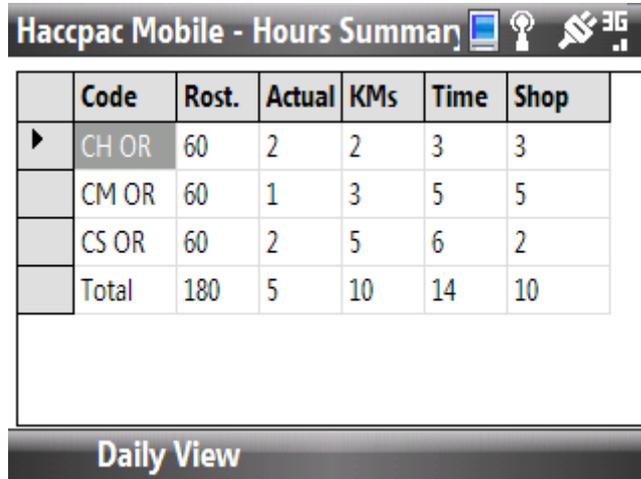
The Summary screen displays the following information for the selected period:

- **Code** - Service code and task type combined.

- **Rost** - Rostered Hours.

- **Actual** - Actual hours.

- **Kms** - Travel & Extra KMs.

- **Time** - Travel time.

- **Shop** - Shopping KMs.

Learning Check

1. Name 3 types of data you can view in the summary screen.

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Lesson Summary

Now that you have completed this lesson, you should be able to:

- View the HPM Job Summary.

Lesson 7 – Viewing Text Messages

Lesson Objectives

After completing this lesson you will be able to:

- View text messages sent to your phone.

Key Concepts

- Recognising when a text message has been sent.
- Viewing text messages.

Trigger

This process is initiated when the HACC team sends you a text message.

1.1 - Walkthrough – Viewing text messages

This walkthrough shows you how to view text messages using your phone.

Follow along as your facilitator demonstrates.

If you have any difficulties please ask your facilitator for assistance.

Step 1	When you receive a text message, your phone will sound an audible tone and the green light on the top left corner of your phone will flash. The home page will also display **1** next to the text message icon.
Step 2	Scroll down using the track ball to the Text Messages window and click.
	Result: The details and contents of the text message will be displayed.
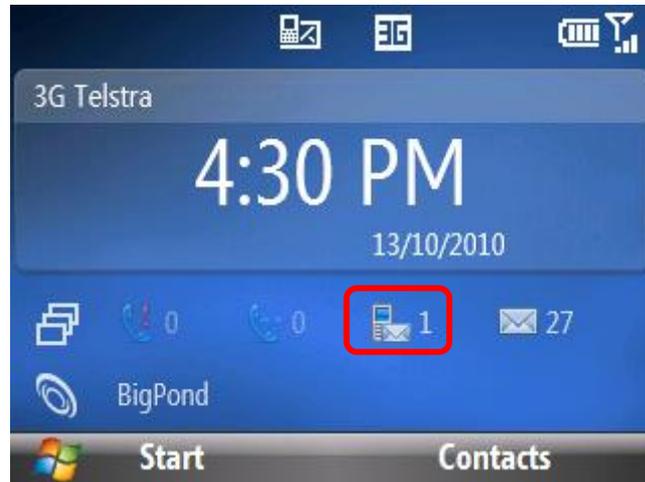
	Tips
💡	• Missed calls are indicated with the blue phone and red exclamation mark icon. • Scroll down to the missed call box to check missed calls.

Learning Check

1.   How can you tell that a new text message has arrived?

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Lesson Summary

Now that you have completed this lesson, you should be able to:

*   View text messages sent to your phone.