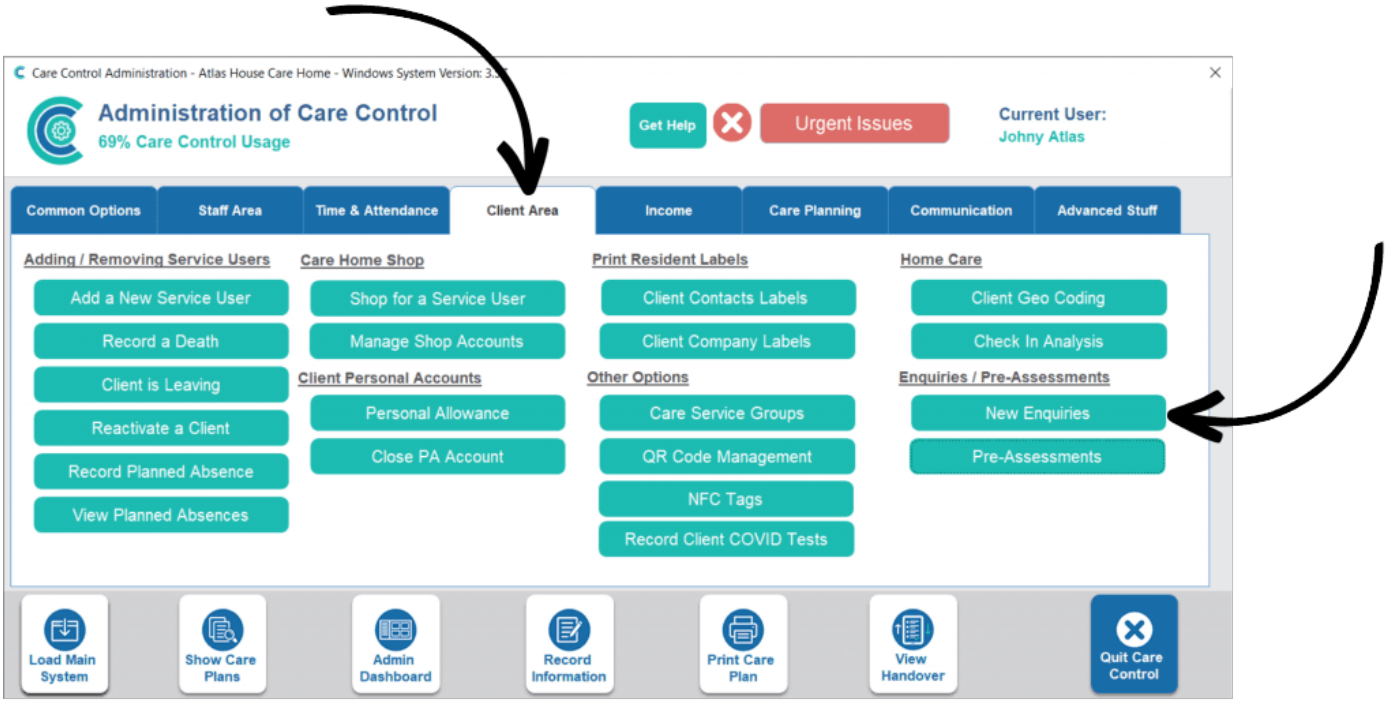
A Guide to Pre-Assessment

Administration Windows · https://cclearninghub.co.uk/docs/a-guide-to-pre-assessment/

A Guide to Pre-Assessment

This guide will cover how to complete New Enquiry forms on Care Control Windows and Pre-Assessments on Care Control Mobile. This feature allows data entry for potential service users before they join the organisation.

Embedded media:
https://player.vimeo.com/video/815278459?color&autopause=0&loop=0&muted=0&title=1&portrait=1&byline=1&h=ba50

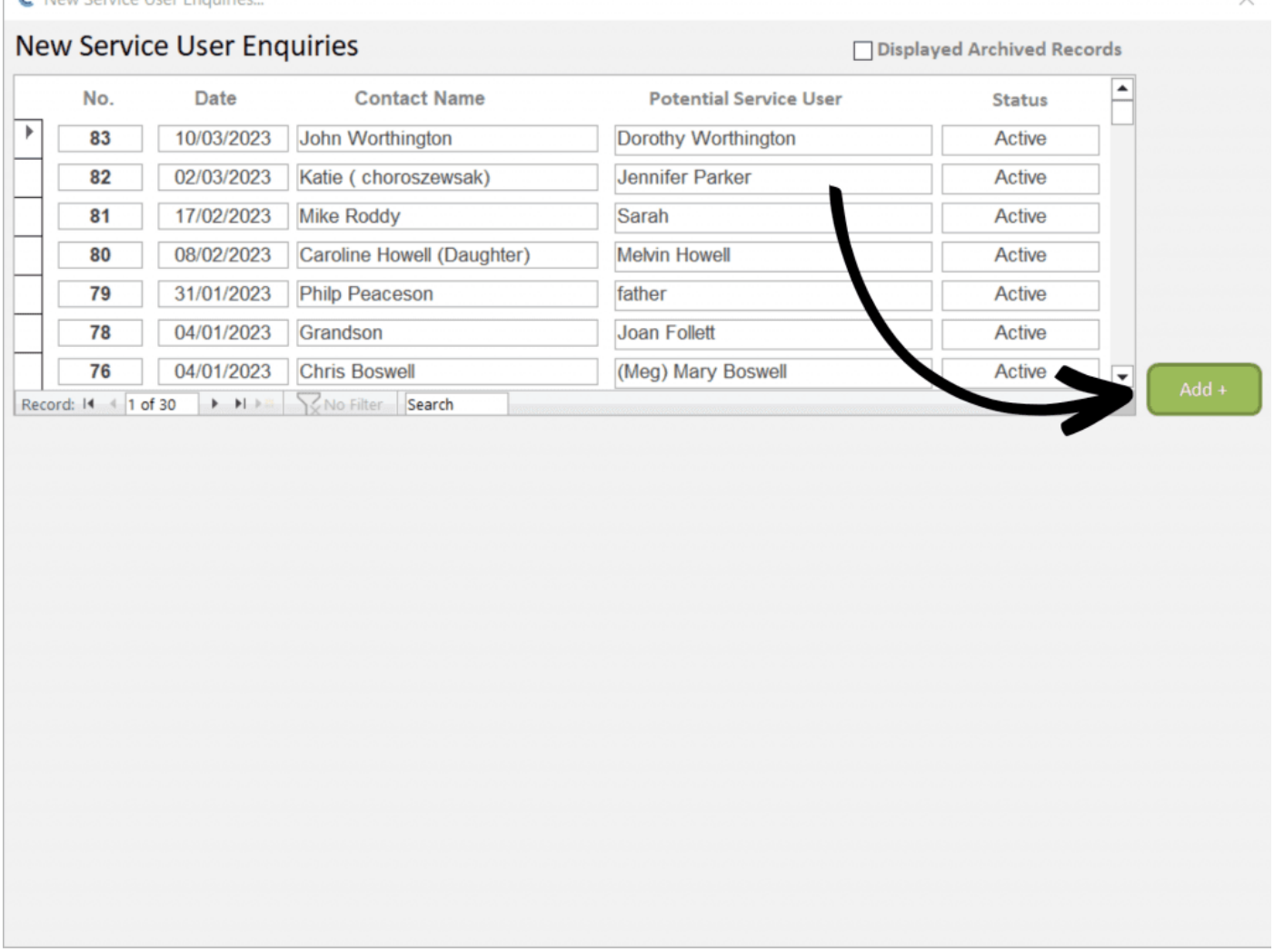


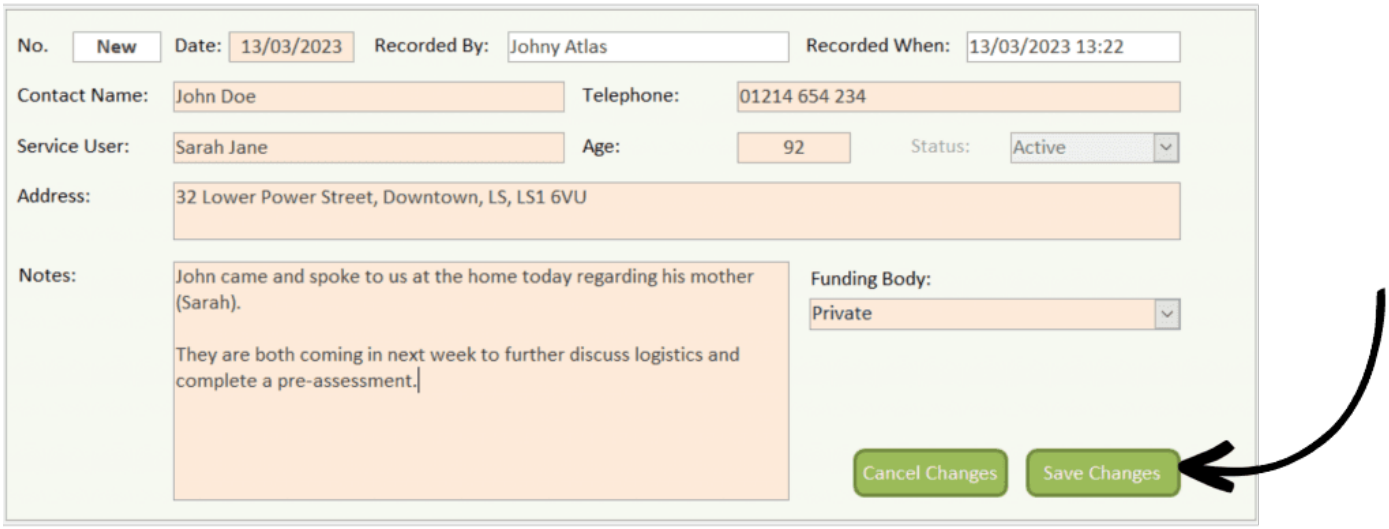
1

In the **Administration of Care Control Windows**, navigate to the **New Enquiries** tool, which can be found under the **Client Area** tab.

2

A new window will open. Here, you can create a new enquiry by pressing the green **Add** button.


New Service User Enquiries
Displayed Archived Records
No.
Date
Contact Name
Potential Service User
Status
83
10/03/2023
John Worthington
Dorothy Worthington
Active
82
02/03/2023
Katie (choroszewsak)
Jennifer Parker
Active
81
17/02/2023
Mike Roddy
Sarah
Active
80
08/02/2023
Caroline Howell (Daughter)
Melvin Howell
Active
79
31/01/2023
Philp Peaceson
father
Active
78
04/01/2023
Grandson
Joan Follett
Active
76
04/01/2023
Chris Boswell
(Meg) Mary Boswell
Active
Record: 1 of 30
No Filter
Search
Add +



3

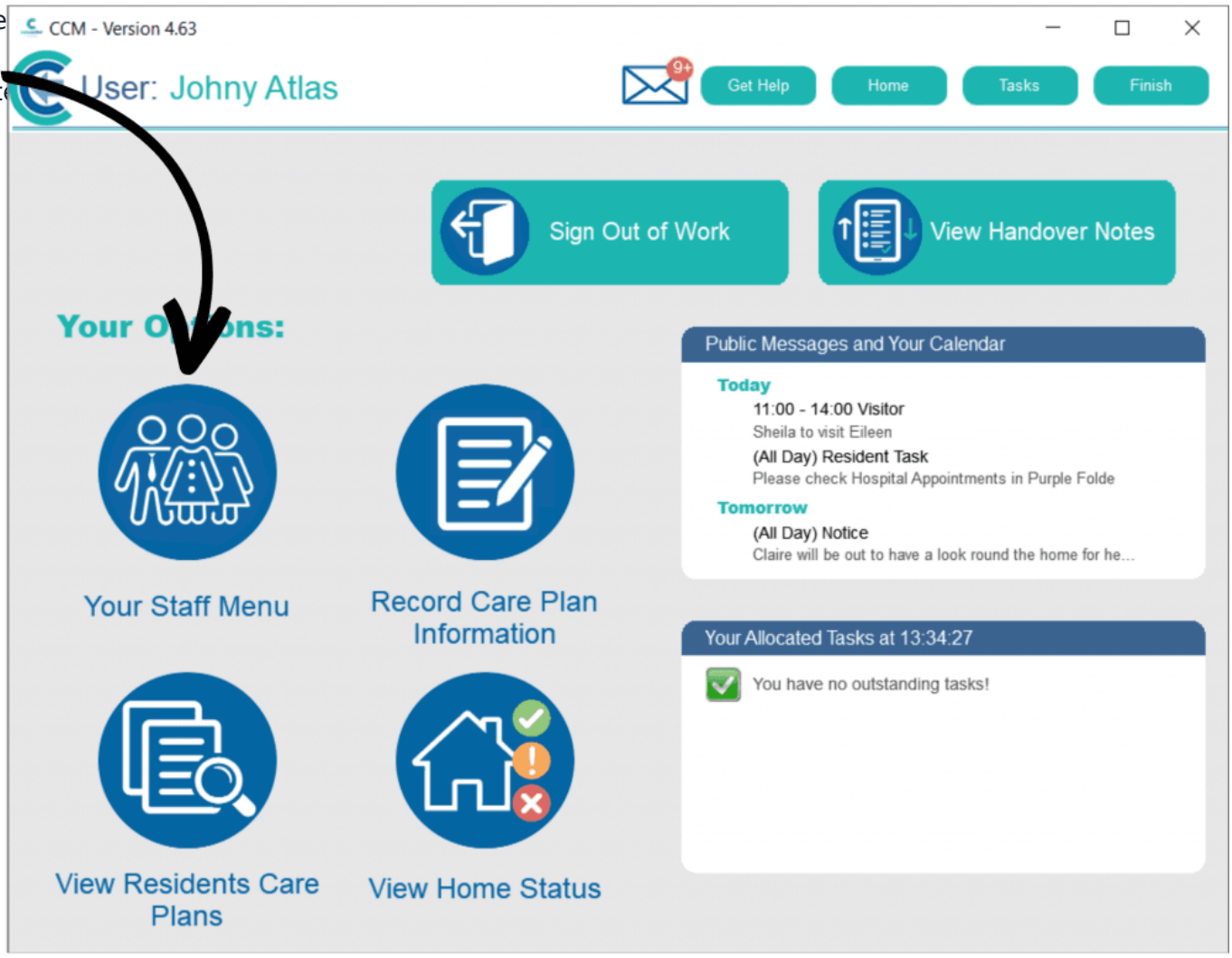
A blank form will open. Here, you can enter some basic information about the new service user enquiry. This includes the contact and service user name, as well as their current address, phone number, age and any further notes.

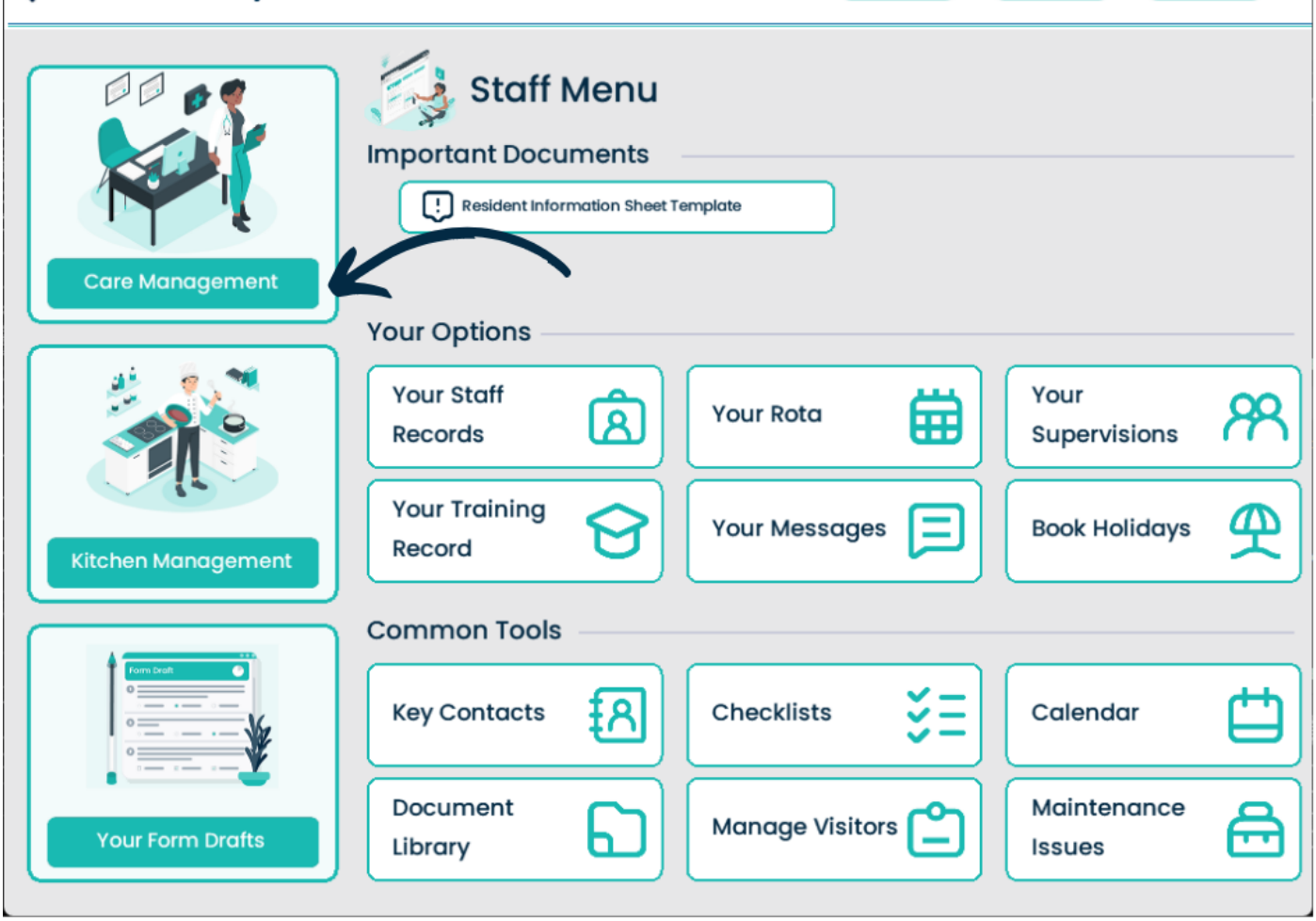
After completing the form, press **Save Changes**.

4

We

Afte


CCM - Version 4.63
User: Johny Atlas
9+
Get Help
Home
Tasks
Finish
Sign Out of Work
View Handover Notes
Your Options:
Your Staff Menu
Record Care Plan Information
View Residents Care Plans
View Home Status
Public Messages and Your Calendar
Today
11:00 - 14:00 Visitor
Sheila to visit Eileen
(All Day) Resident Task
Please check Hospital Appointments in Purple Folde
Tomorrow
(All Day) Notice
Claire will be out to have a look round the home for he...
Your Allocated Tasks at 13:34:27
You have no outstanding tasks!

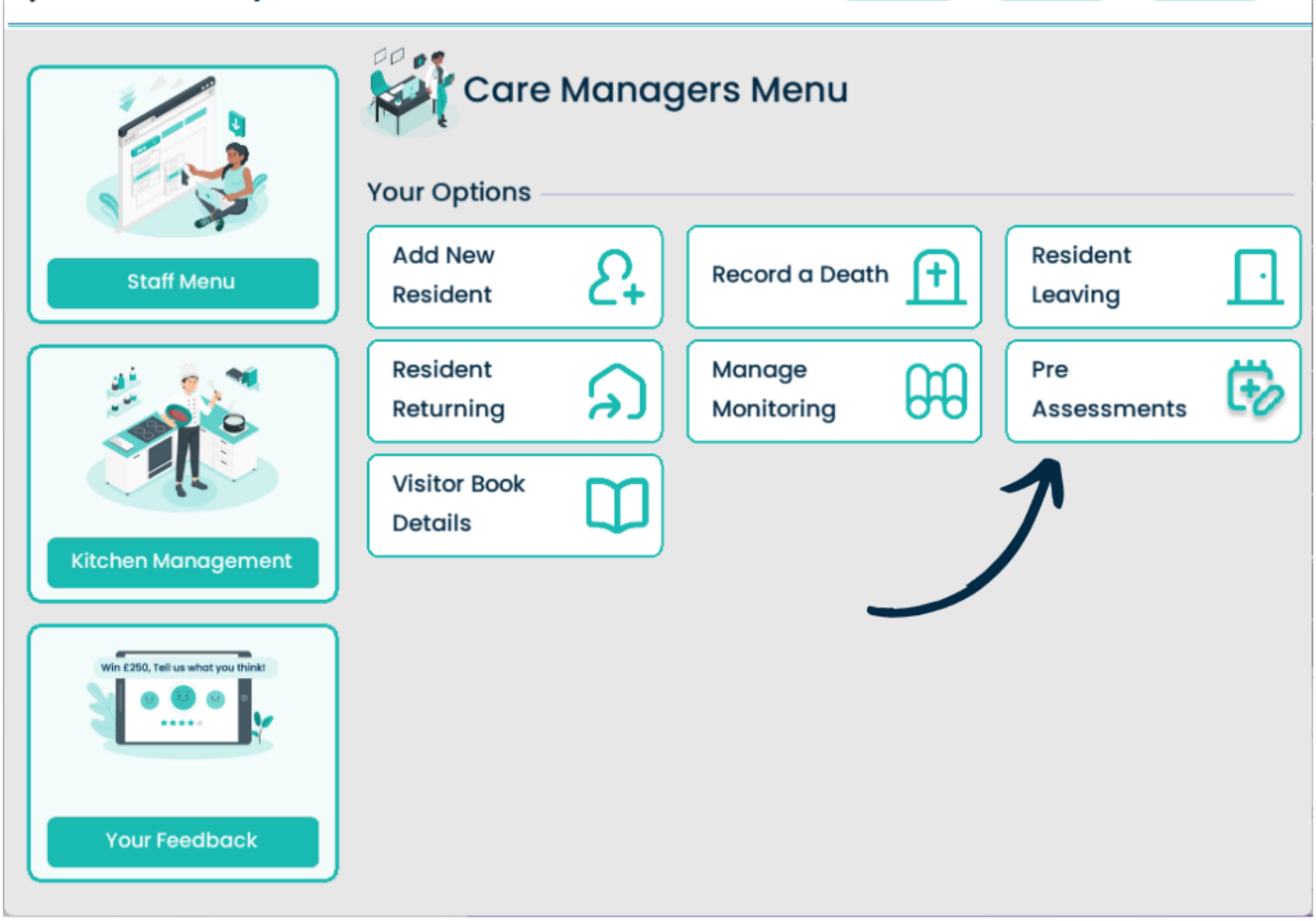


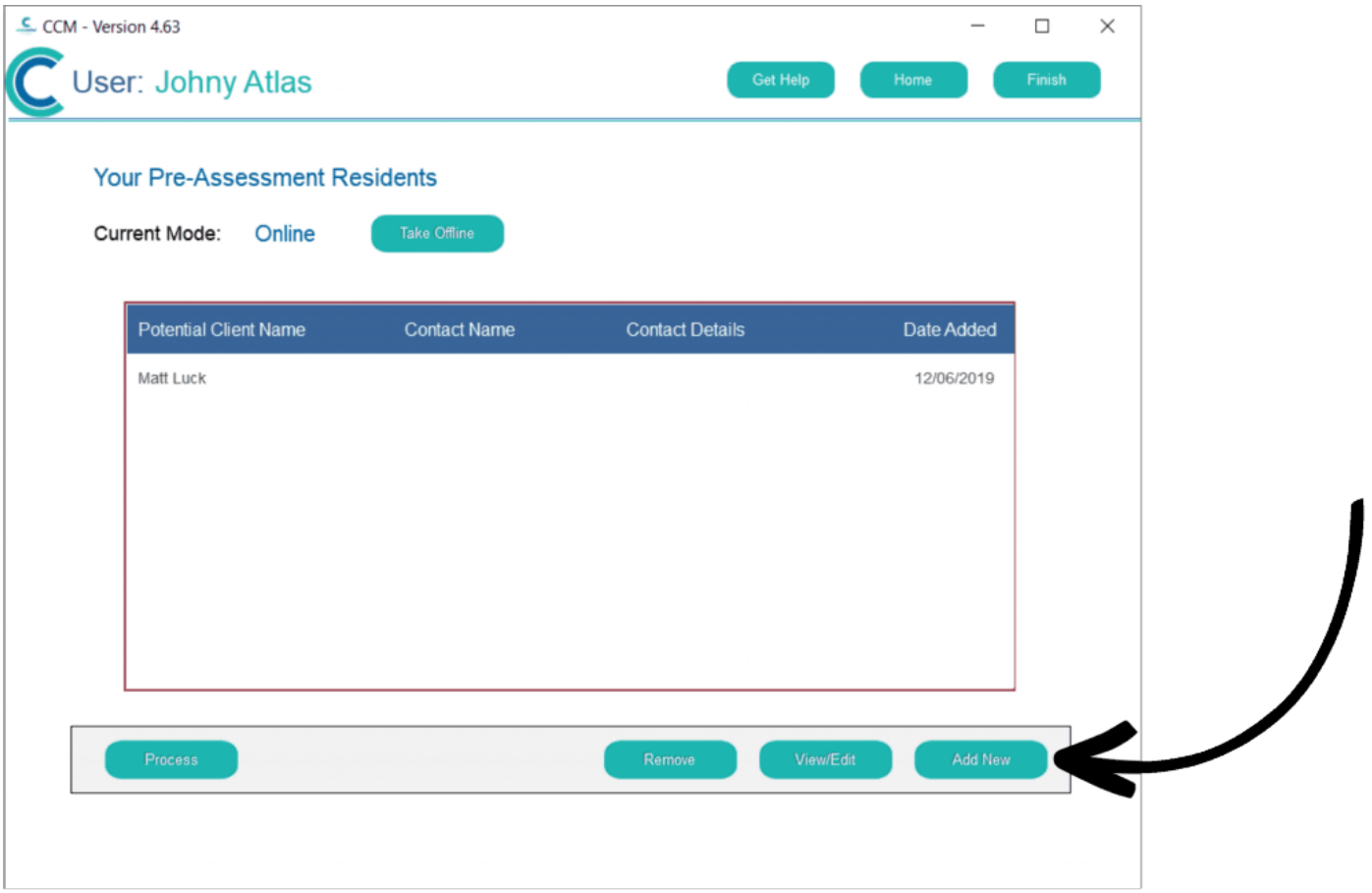
5

Here, select **Care Management**.

6

Here, select **Pre-Assessment**.


Staff Menu
Kitchen Management
Win £250, Tell us what you think!
Your Feedback
Care Managers Menu
Your Options
Add New Resident
Record a Death
Resident Leaving
Resident Returning
Manage Monitoring
Pre Assessments
Visitor Book Details

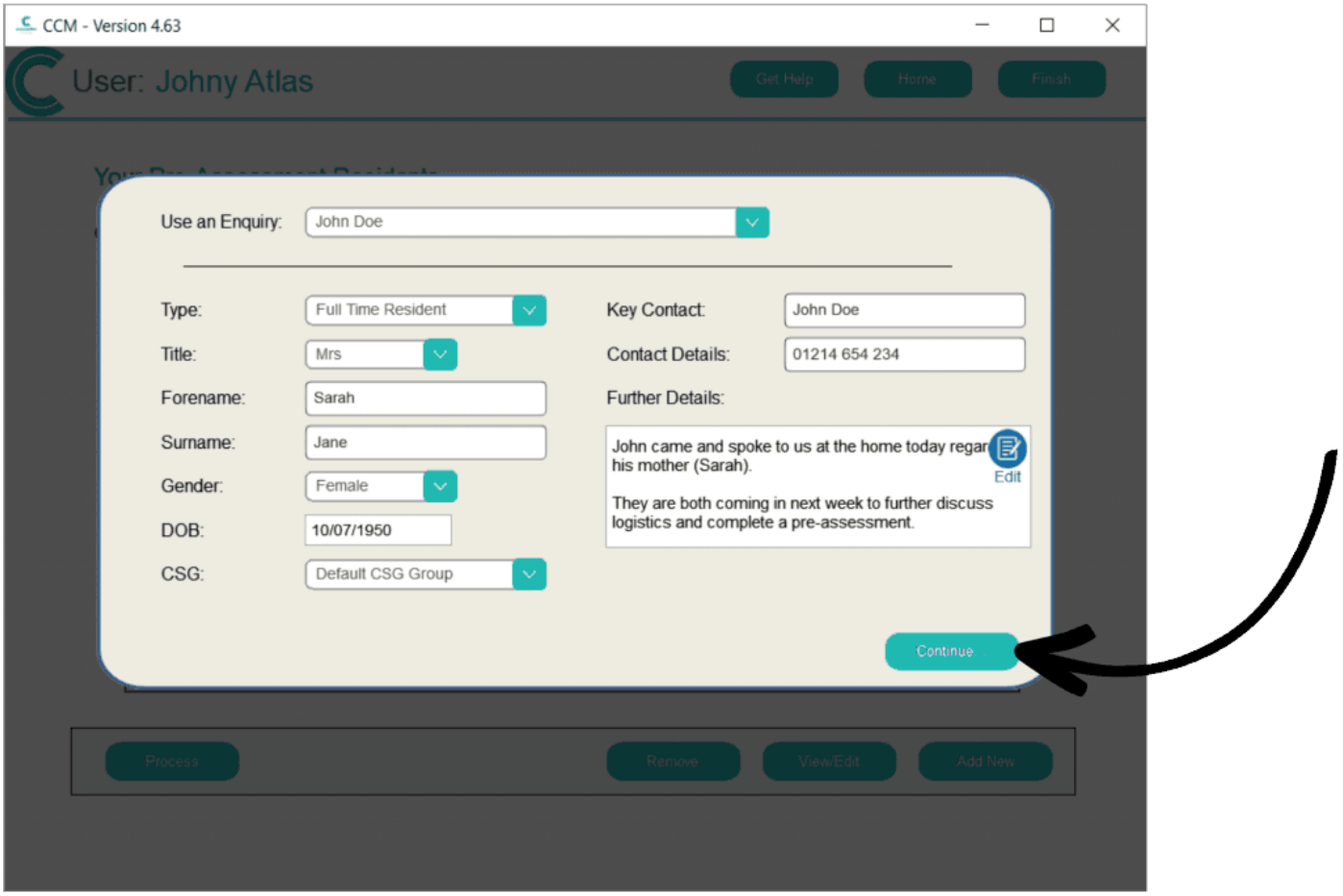


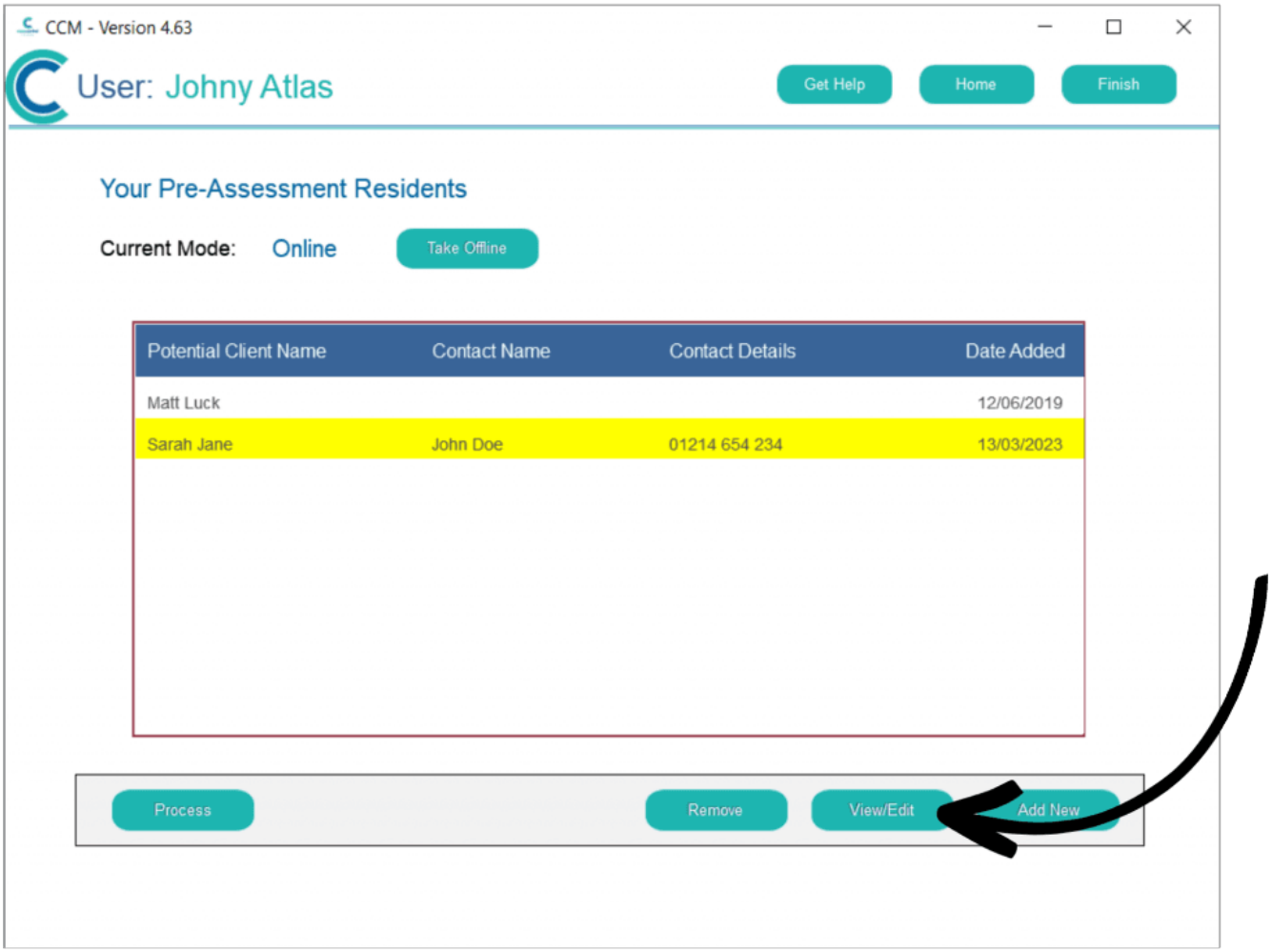
7

A list of active pre-assessments will be displayed. To add a new one from an already existing enquiry, press **Add New**.

8

A blank form will open. From the drop-down list, select the enquiry created on Care Control Windows. Then, fill out the rest of the form and press **Continue**.


CCM - Version 4.63
User: Johny Atlas
Get Help
Home
Finish
Use an Enquiry:
John Doe
Type:
Full Time Resident
Title:
Mrs
Forename:
Sarah
Surname:
Jane
Gender:
Female
DOB:
10/07/1950
CSG:
Default CSG Group
Key Contact:
John Doe
Contact Details:
01214 654 234
Further Details:
John came and spoke to us at the home today regar
his mother (Sarah).
Edit
They are both coming in next week to further discuss
logistics and complete a pre-assessment.
Continue
Process
Remove
View/Edit
Add New

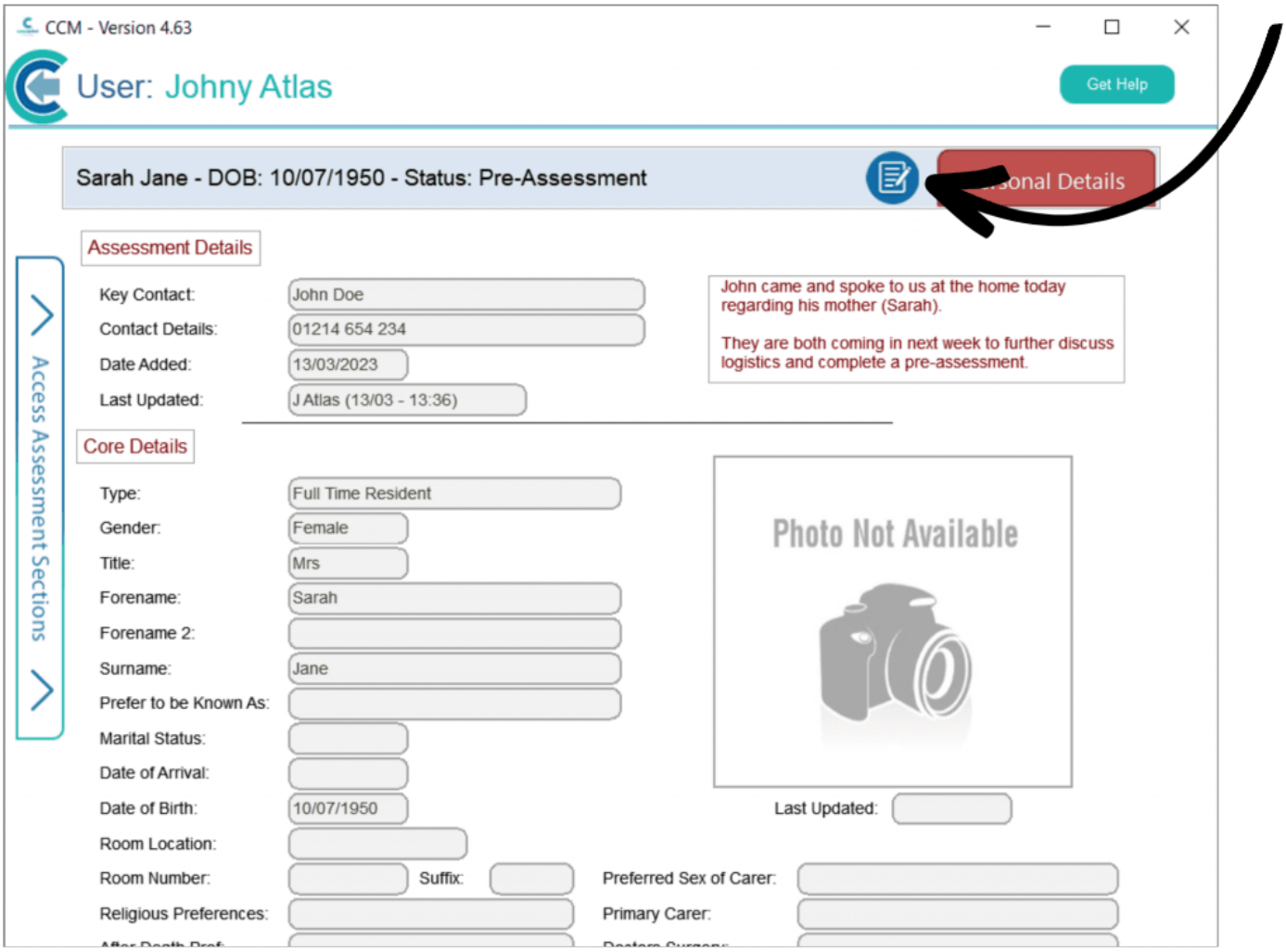


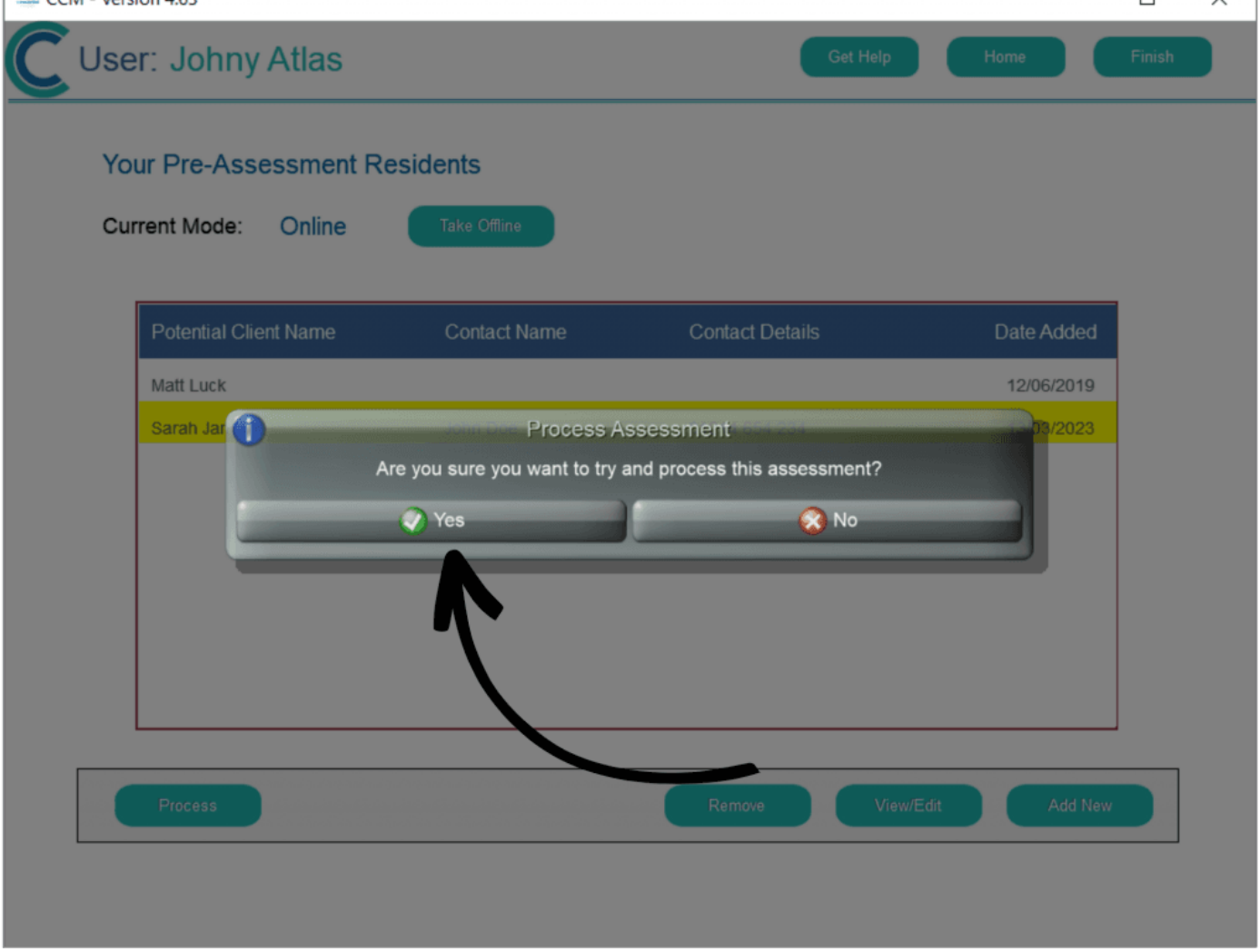
9

Your enquiry will be added to the pre-assessment list. You can continue to enter information about the service user by selecting the potential client and pressing **View/Edit**.

10

This will open the start of the service users care plan. Here, you can enter further information about the client before they are processed into the organisation. Press the **blue edit button** near the top of the screen to enter editing mode.


CCM - Version 4.63
User: Johny Atlas
Get Help
Sarah Jane - DOB: 10/07/1950 - Status: Pre-Assessment
Assessment Details
Key Contact: John Doe
Contact Details: 01214 654 234
Date Added: 13/03/2023
Last Updated: J Atlas (13/03 - 13:36)
John came and spoke to us at the home today regarding his mother (Sarah).
They are both coming in next week to further discuss logistics and complete a pre-assessment.
Access Assessment Sections
Core Details
Type: Full Time Resident
Gender: Female
Title: Mrs
Forename: Sarah
Forename 2:
Surname: Jane
Prefer to be Known As:
Marital Status:
Date of Arrival:
Date of Birth: 10/07/1950
Room Location:
Room Number:
Suffix:
Religious Preferences:
Photo Not Available
Last Updated:
Preferred Sex of Carer:
Primary Carer:



11

After completing the pre-assessment, you can process the service user into the organisation by selecting them and pressing **Process**. Then, press **Yes**.