How to Complete a Pre-Assessment on Mobile

Care Control Mobile · https://cclearninghub.co.uk/docs/how-to-complete-a-pre-assessment-on-mobile/

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- Home
- Care Control Knowledgebase
- Care Control Mobile
- How to Complete a Pre-Assessment on Mobile



Kieran Worth

This guide explains how to access, update, and complete a pre-assessment within the Care Management system, including reviewing details, editing information, and progressing through assessment stages.

Completing pre-assessments accurately is essential for ensuring all service user information is up to date, supporting informed care decisions, and maintaining compliance with care standards. Following this process helps improve efficiency, reduces the risk of missing key information, and ensures a smooth transition from initial enquiry to full assessment.

By following this guide, you will learn how to:

- Access and open pre-assessment records
- Edit and update service user details
- Complete care review and assessment sections
- Review and communicate cost of care information
- Finalise and process the assessment

This ensures all pre-assessment information is accurately recorded, properly reviewed, and ready for progression within the care management process.

NB: You currently require a Cloud CRM subscription in order to continue the assessment process.

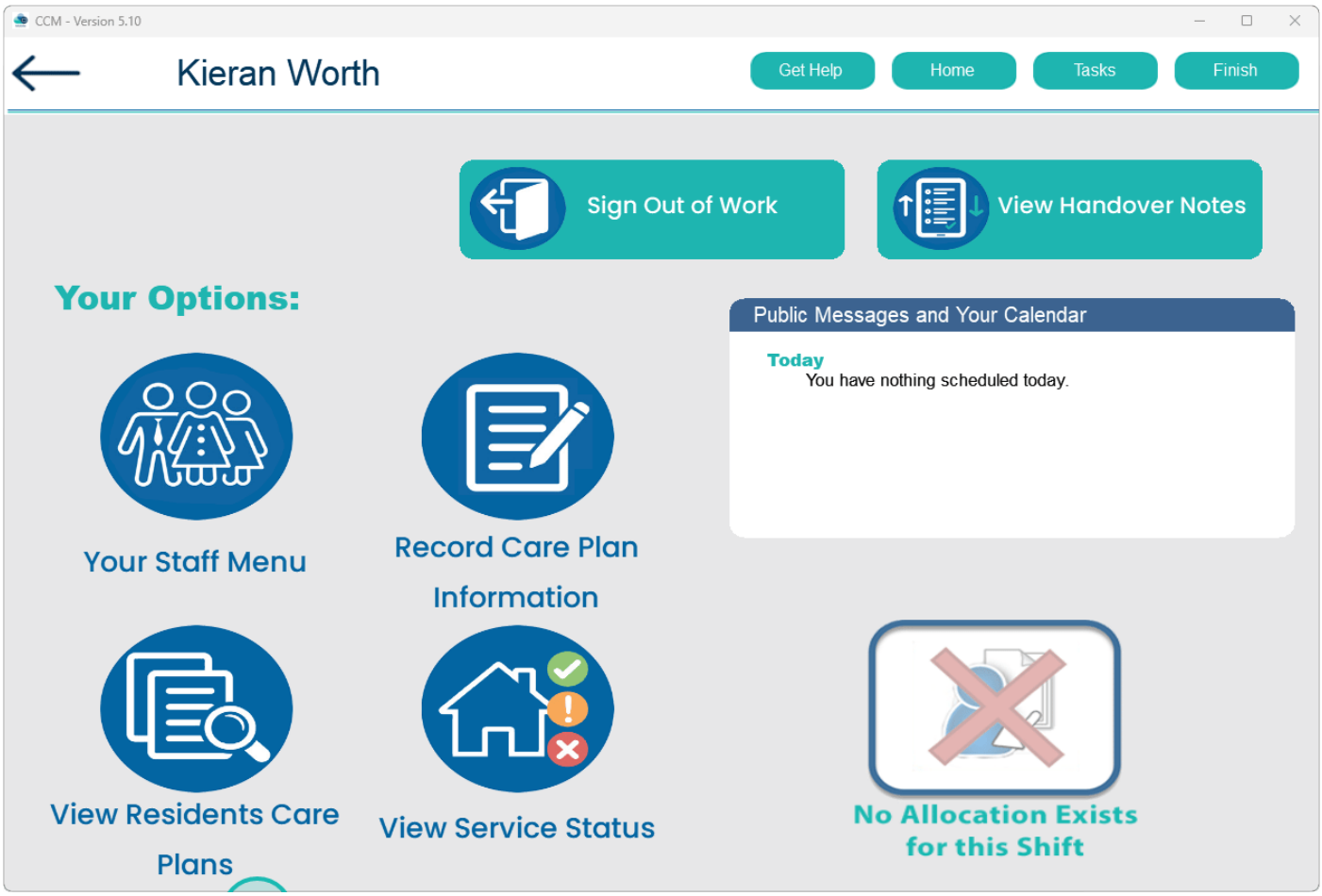
Interactive Guide

Embedded media:

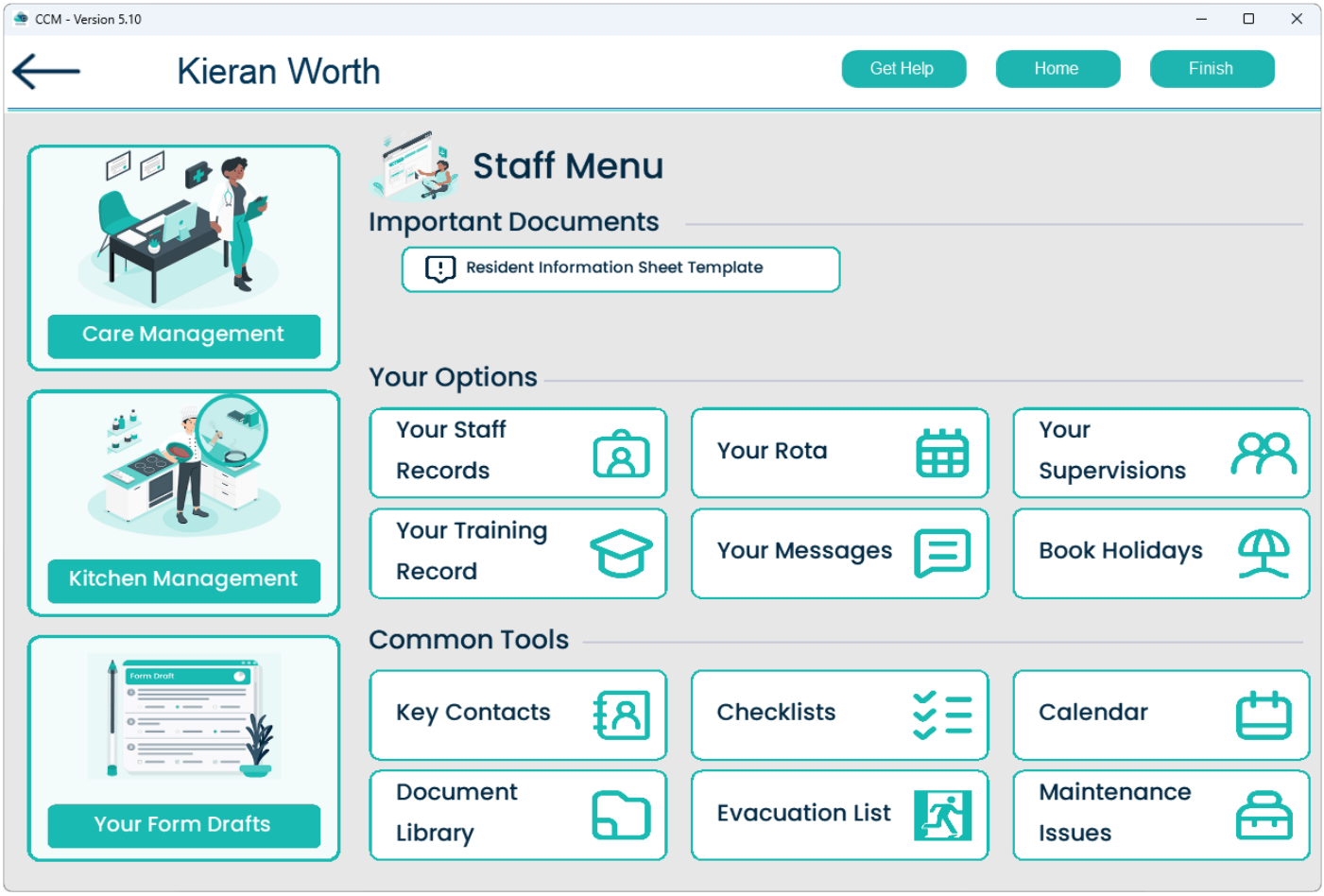
https://demo.arcade.software/5URKmUibHSYkHheMhGbh?embed&embed_mobile=tab&embed_desktop=inline&show_copy_

Text based guide

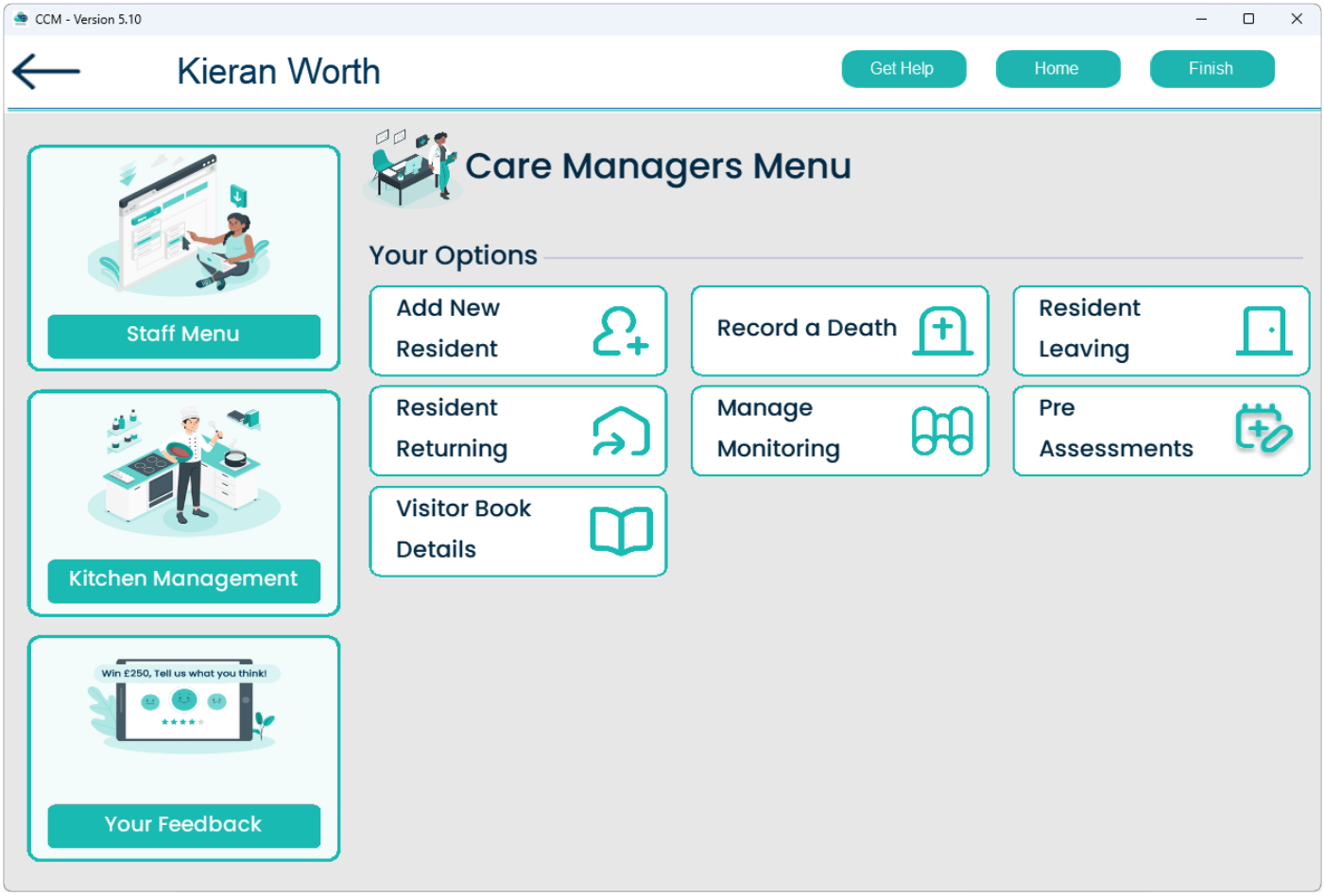
Select View Residents Care Plans to access resident records



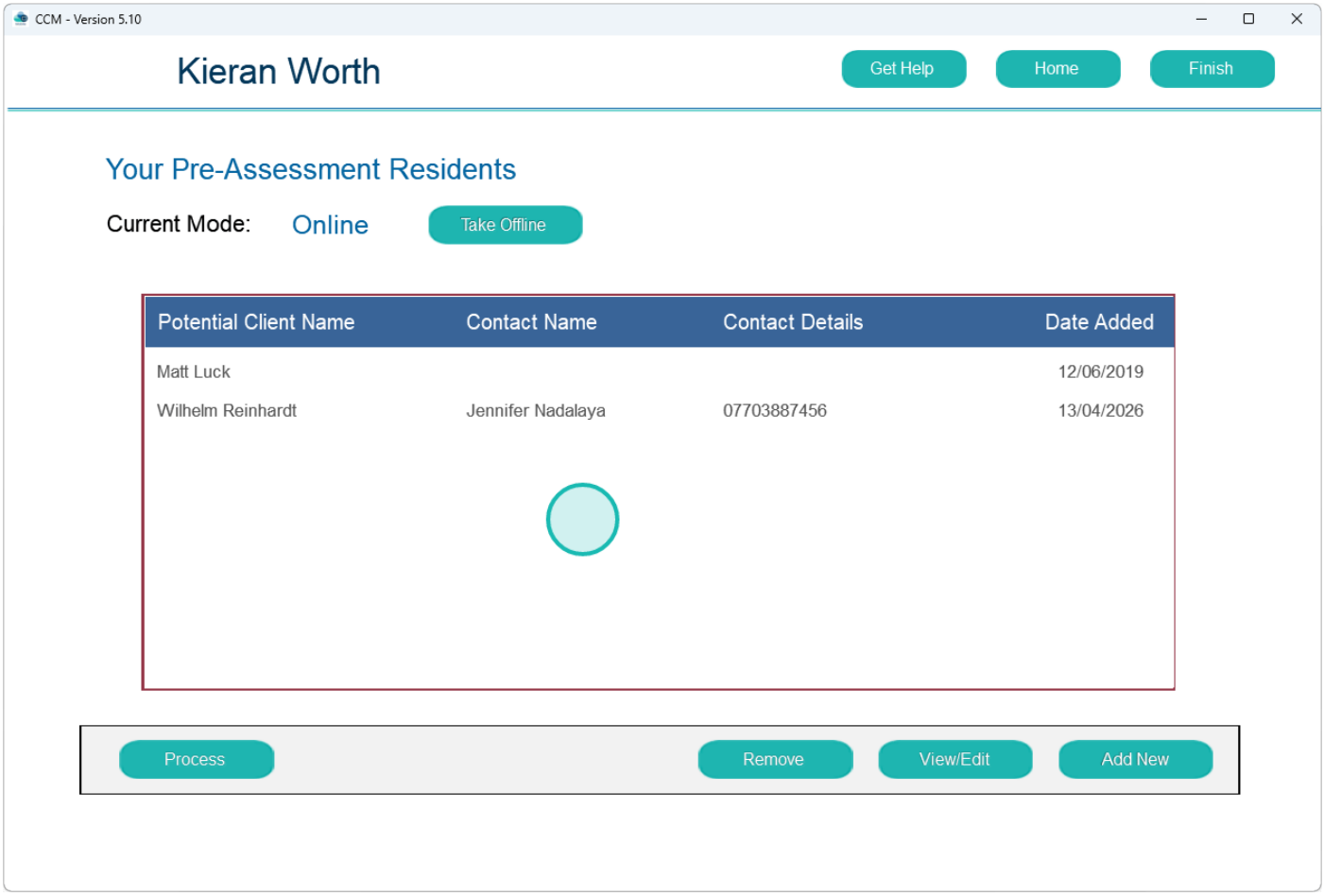
Select Care Management to open care management options



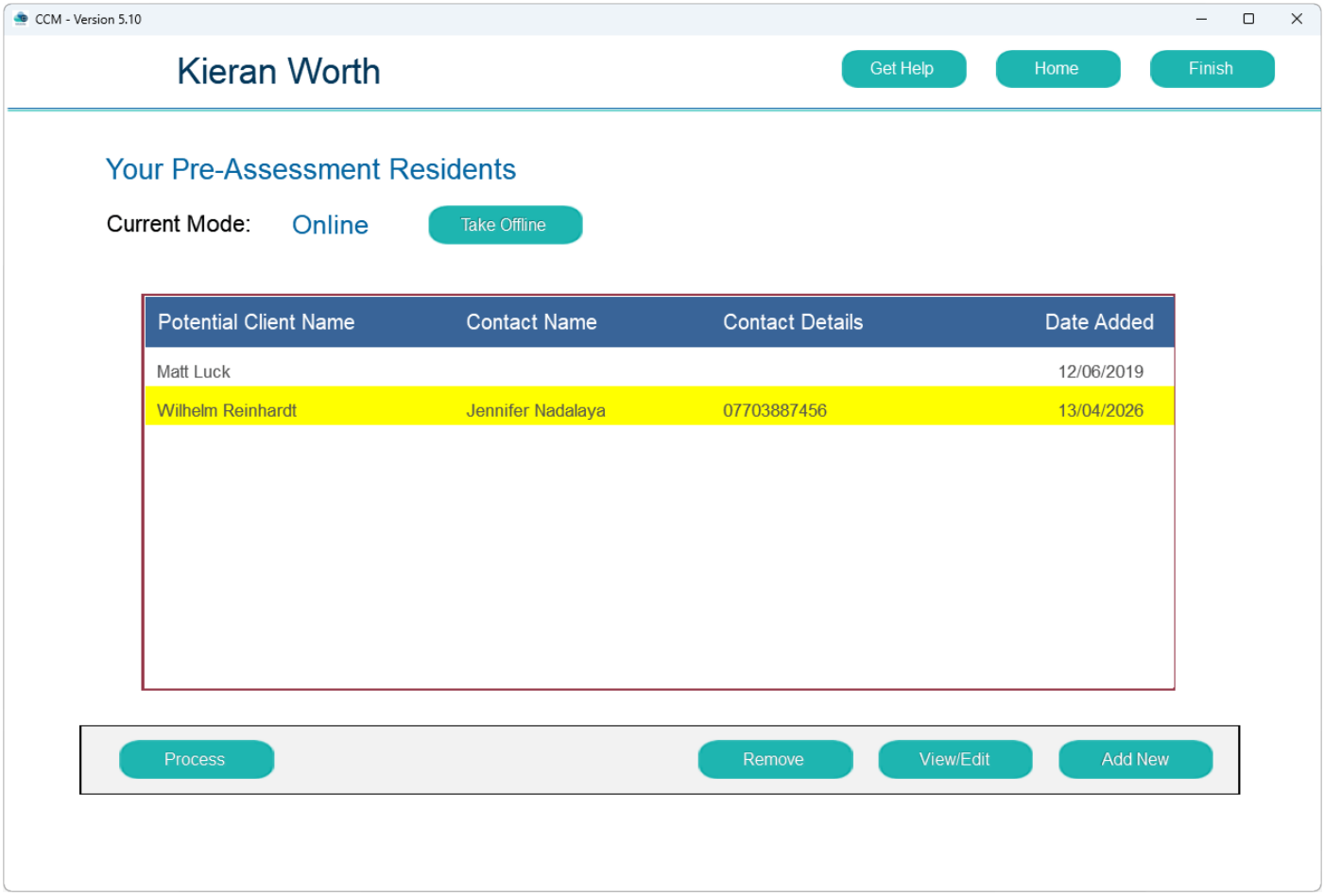
Select Pre Assessments to view available pre-assessment records



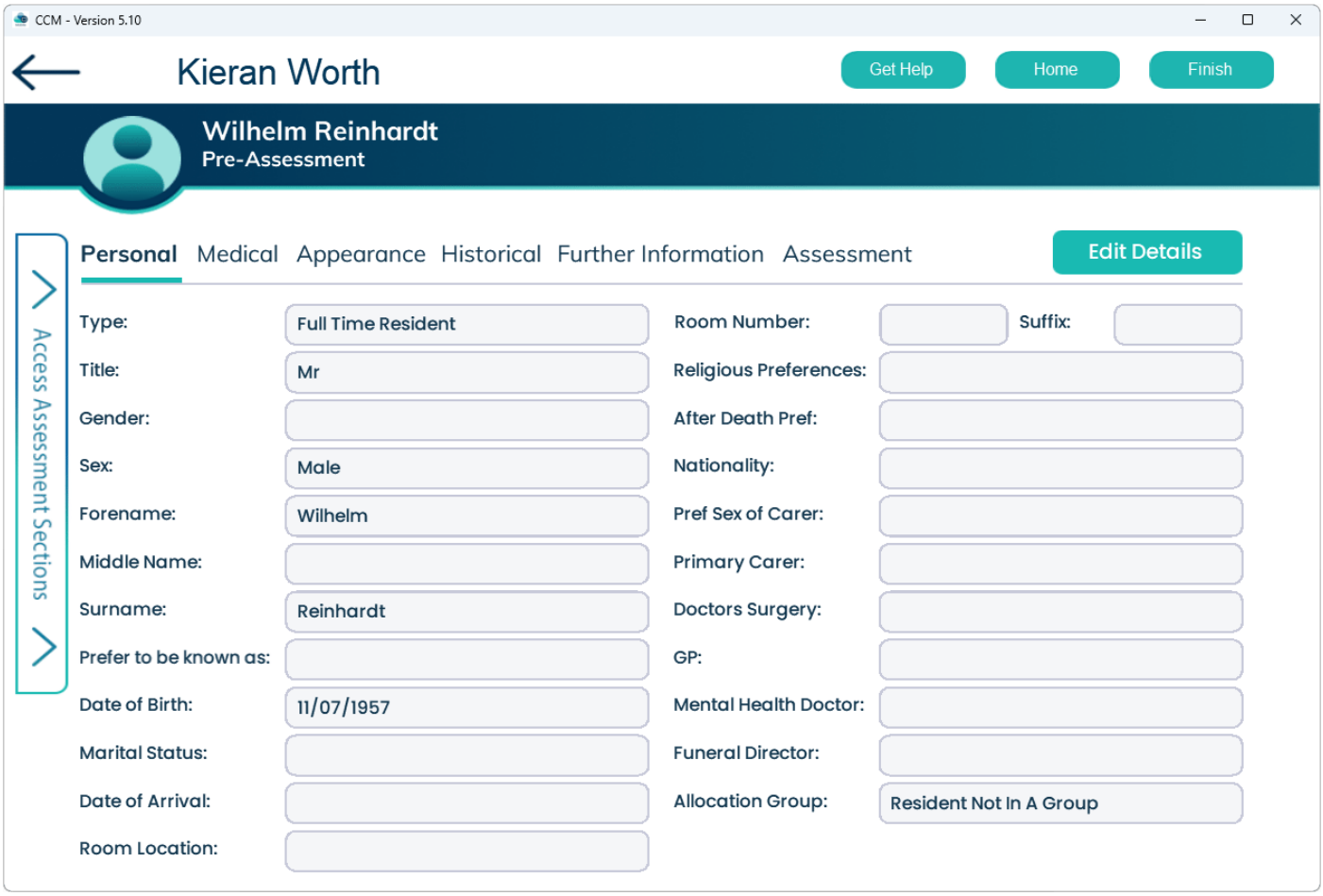
Select the pre-assessment record you want to view or edit



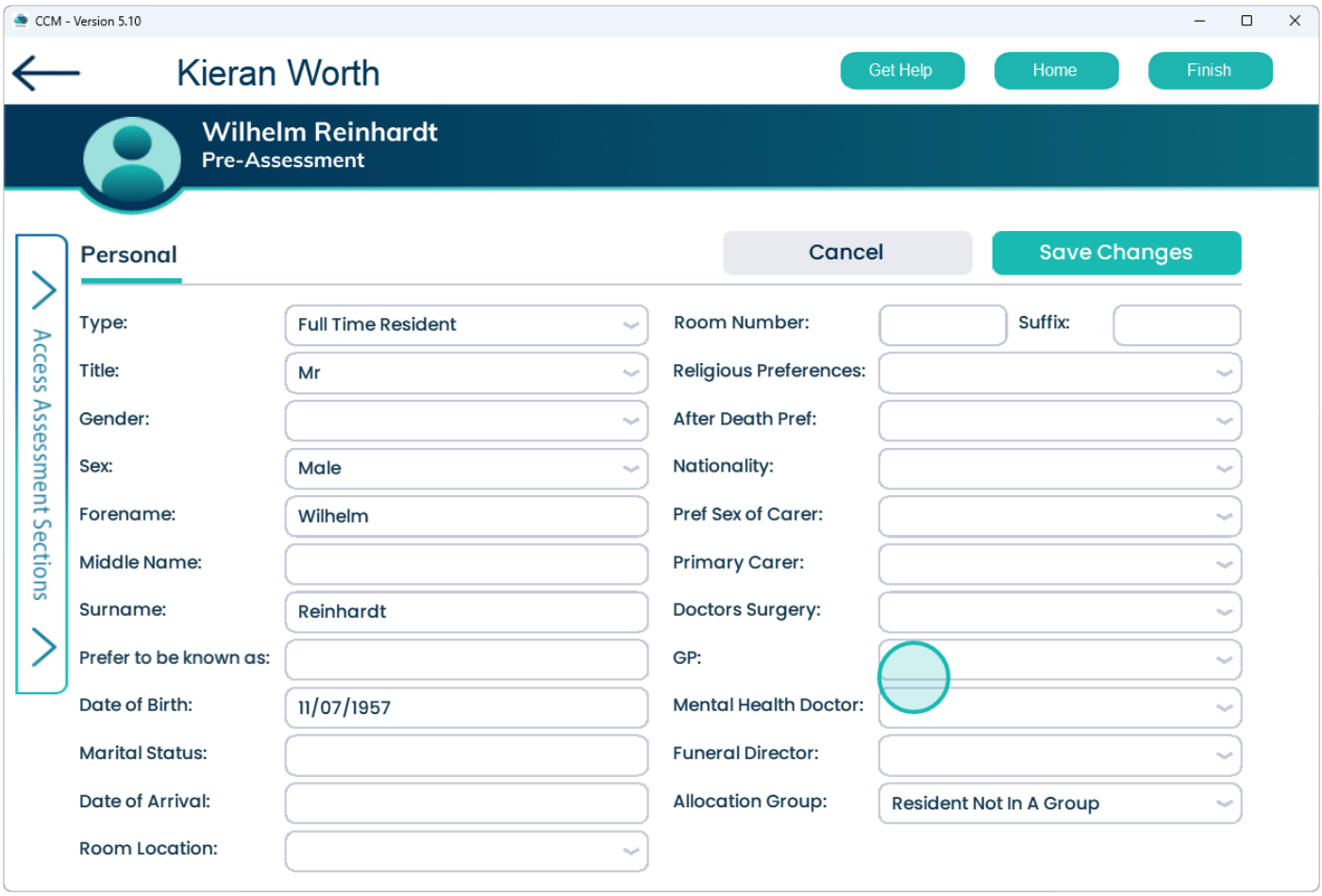
Review the pre-assessment details before making any changes



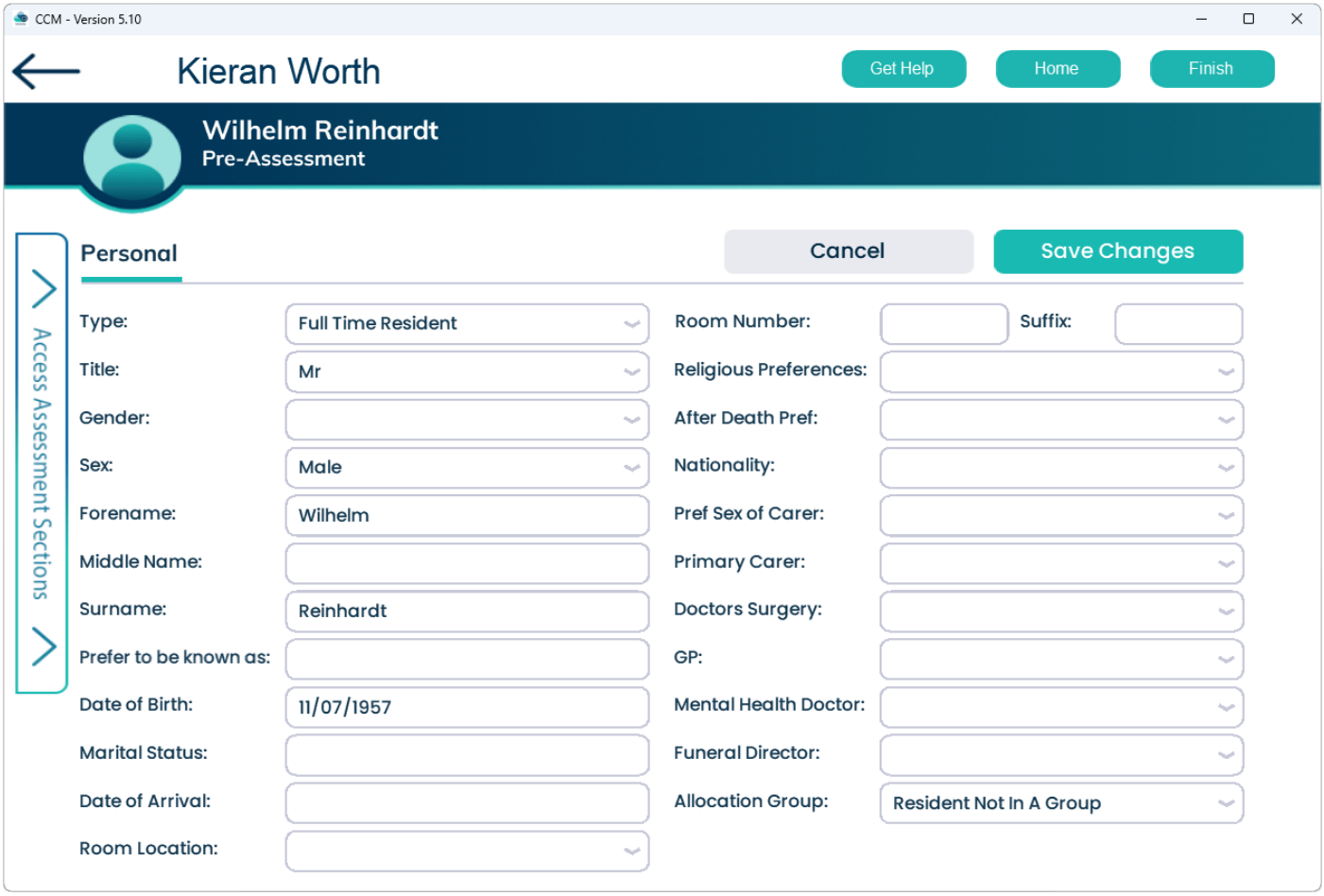
Select Edit Details to update the personal information of the potential service user



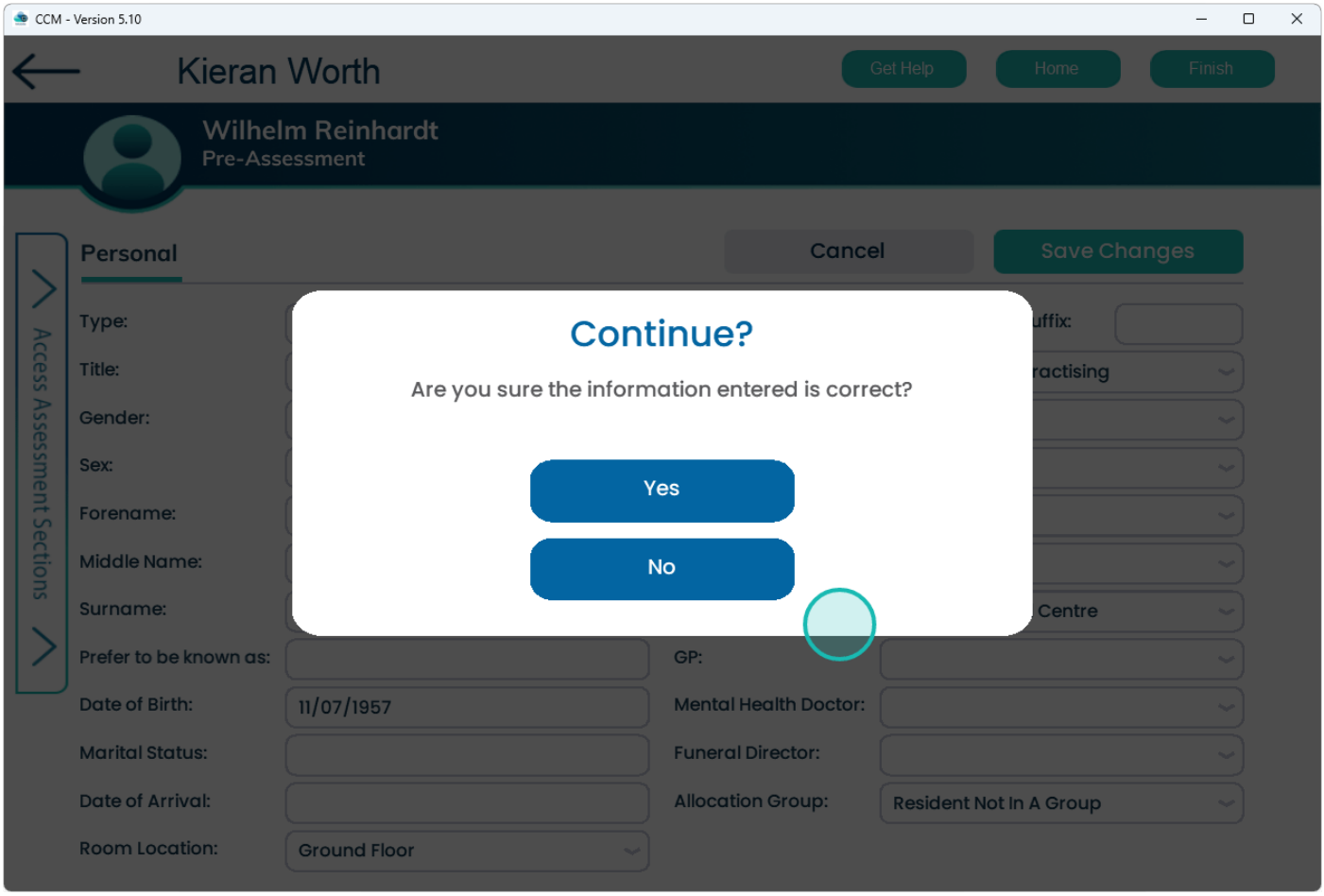
Update the required details using the form fields provided



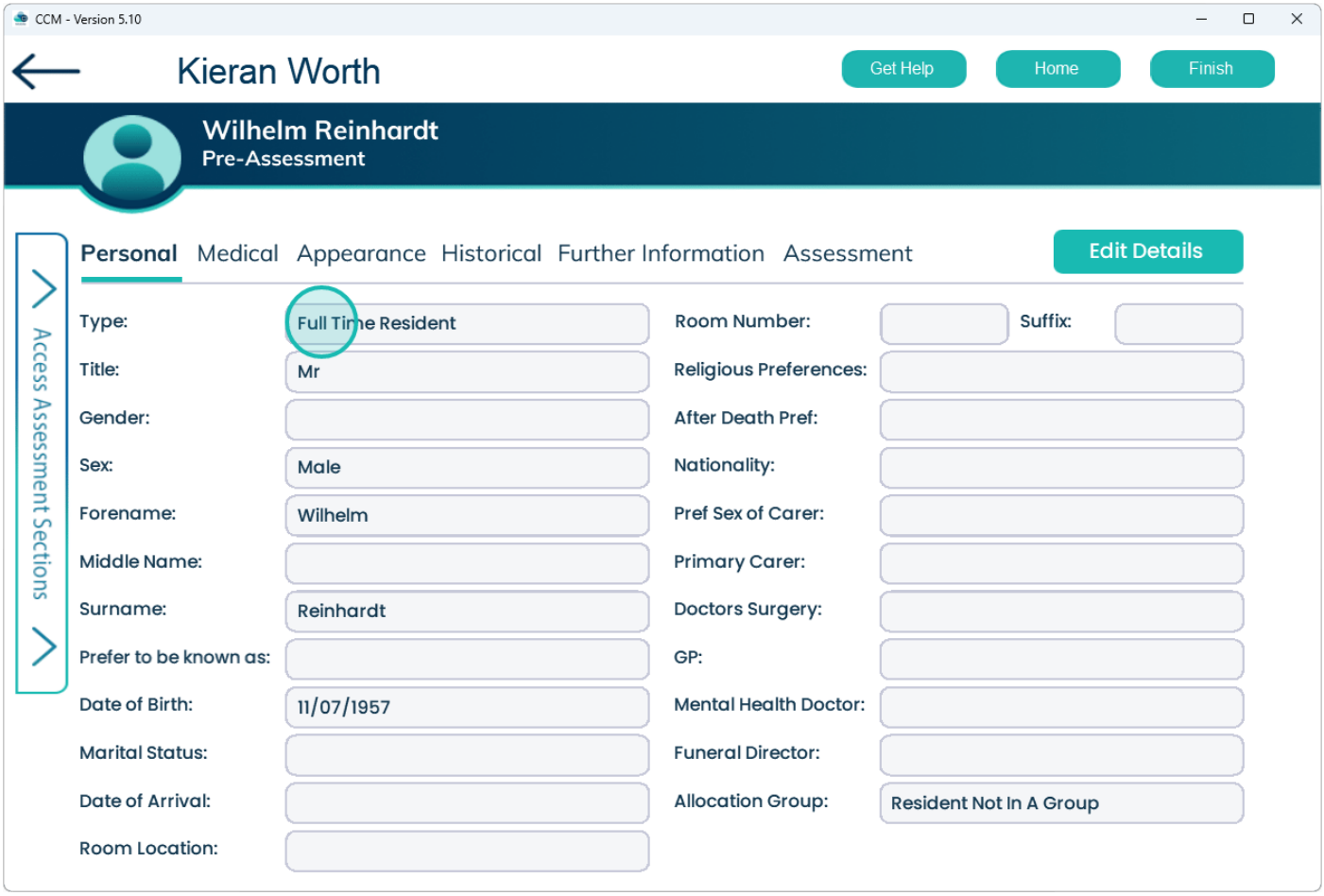
Select Save Changes to apply and store your updates



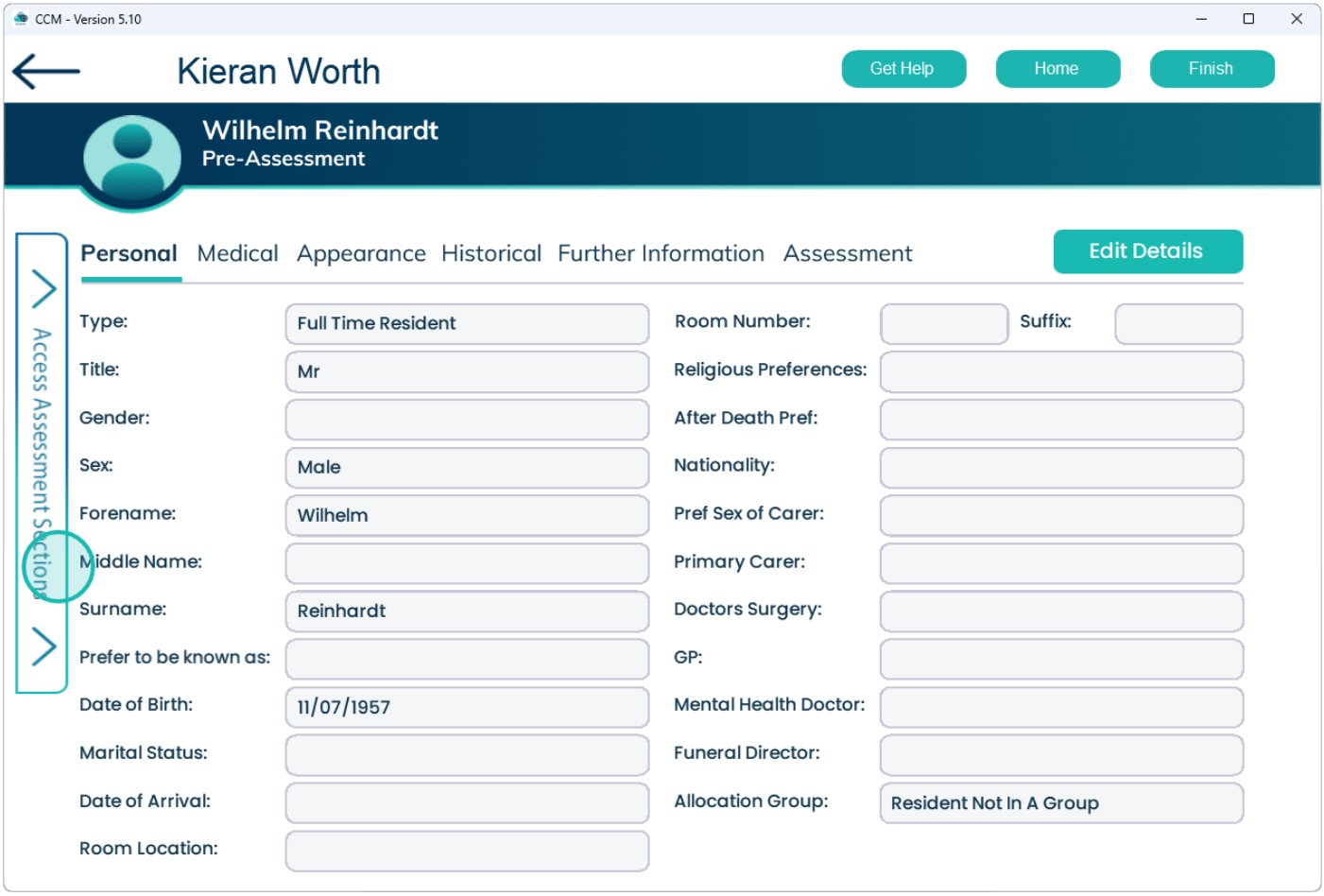
Select Yes to confirm and finalise the changes



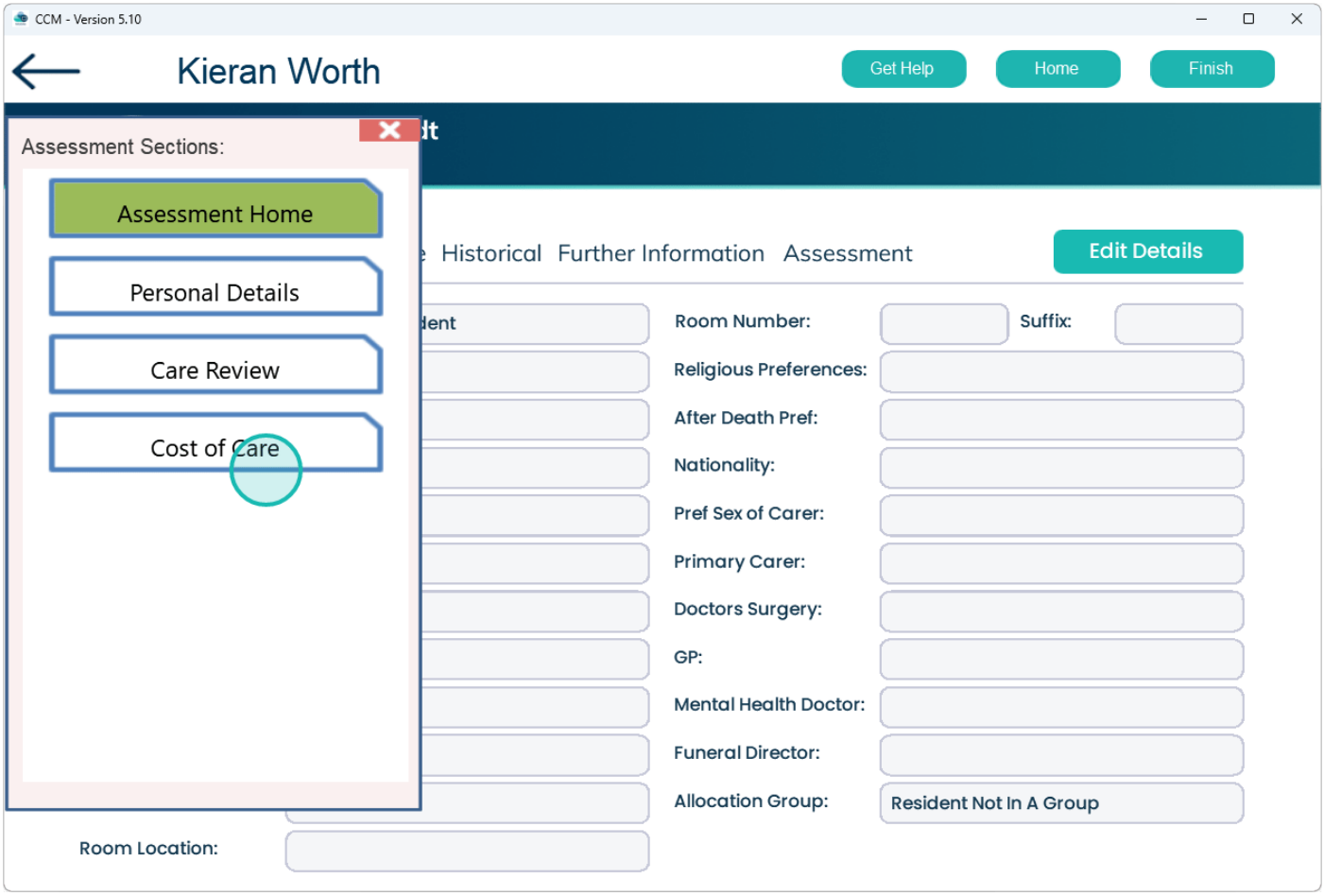
Select each tab and repeat the process to complete all relevant information



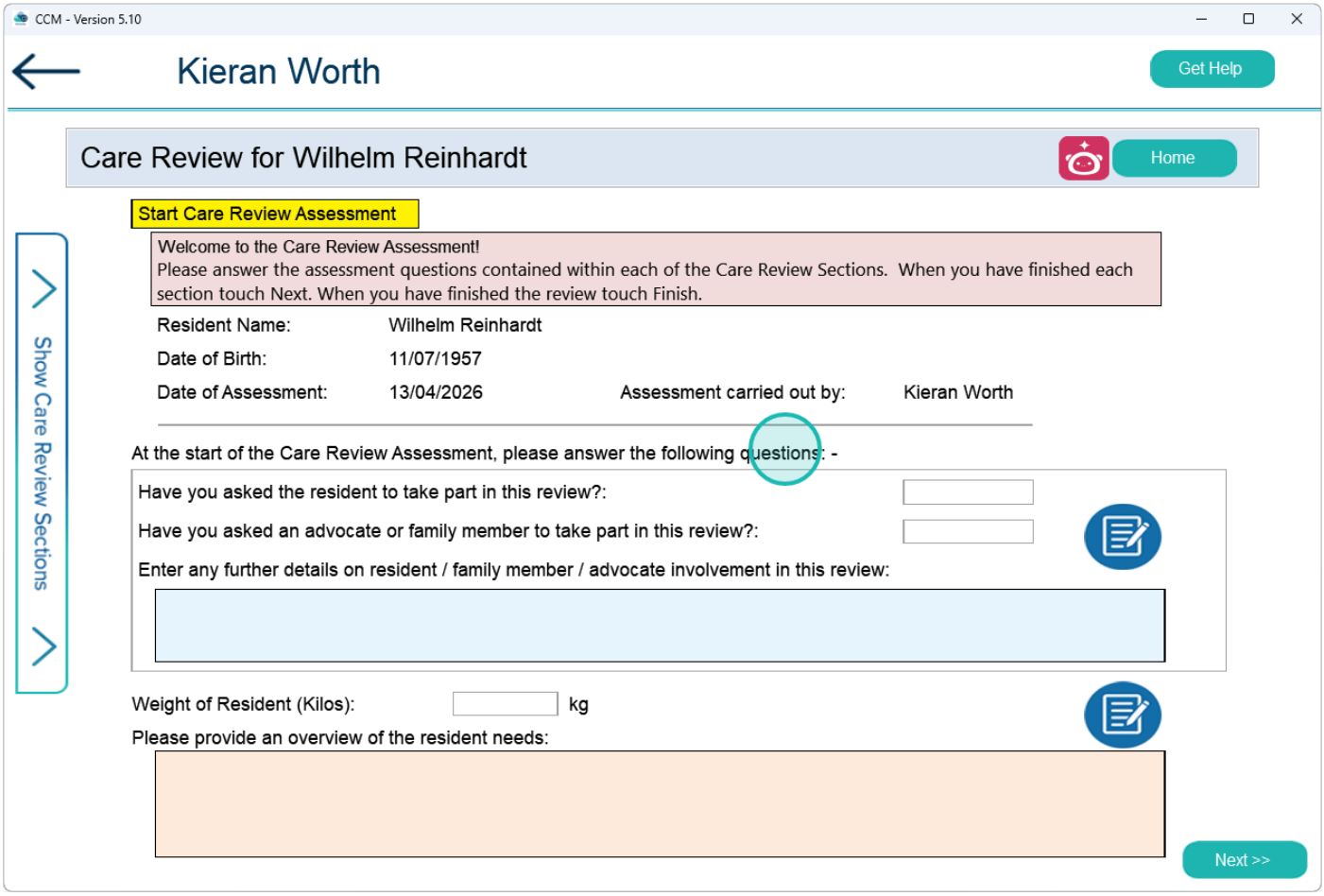
Open the Access Assessment section to view additional assessment options



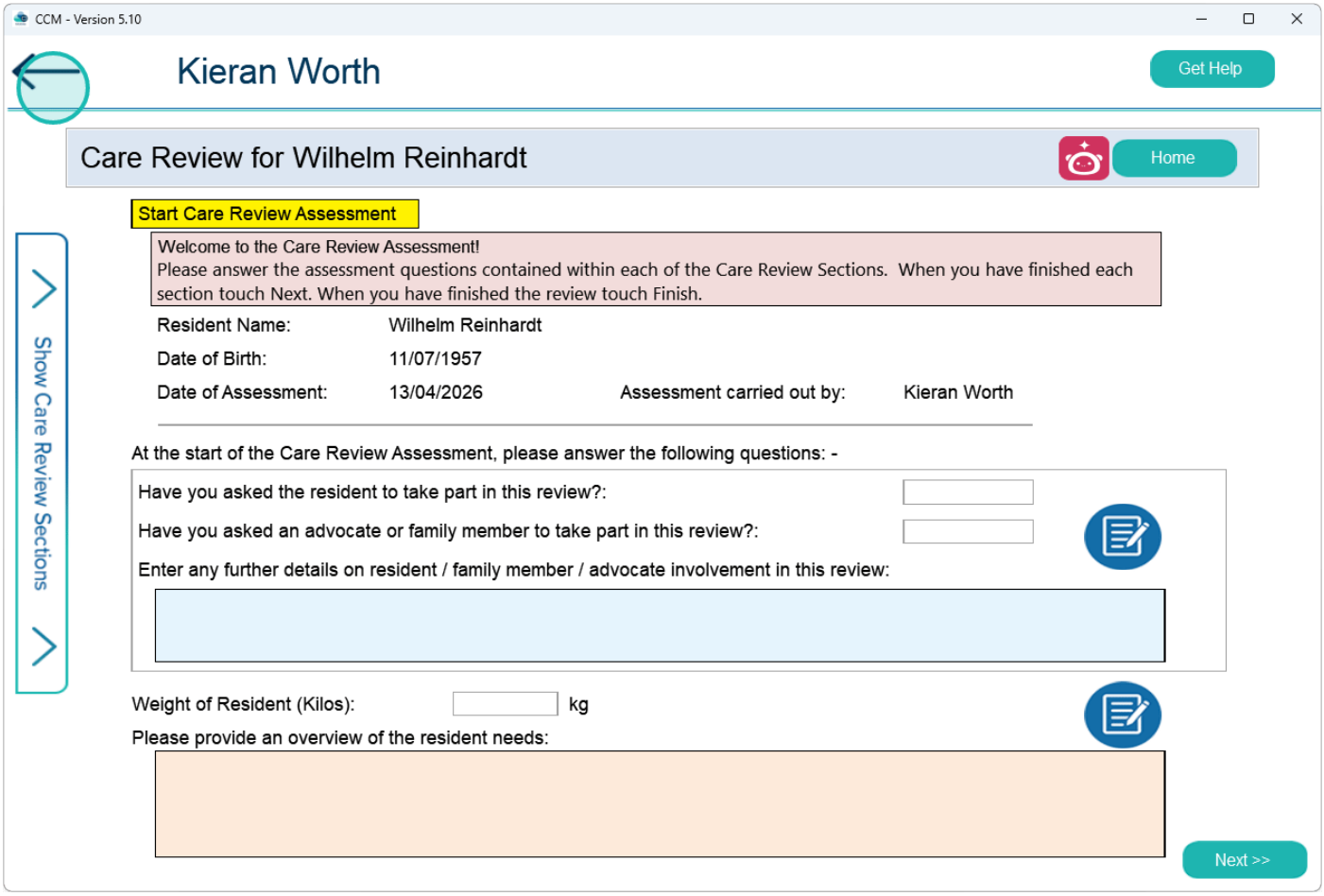
Select Care Review to access the care review section



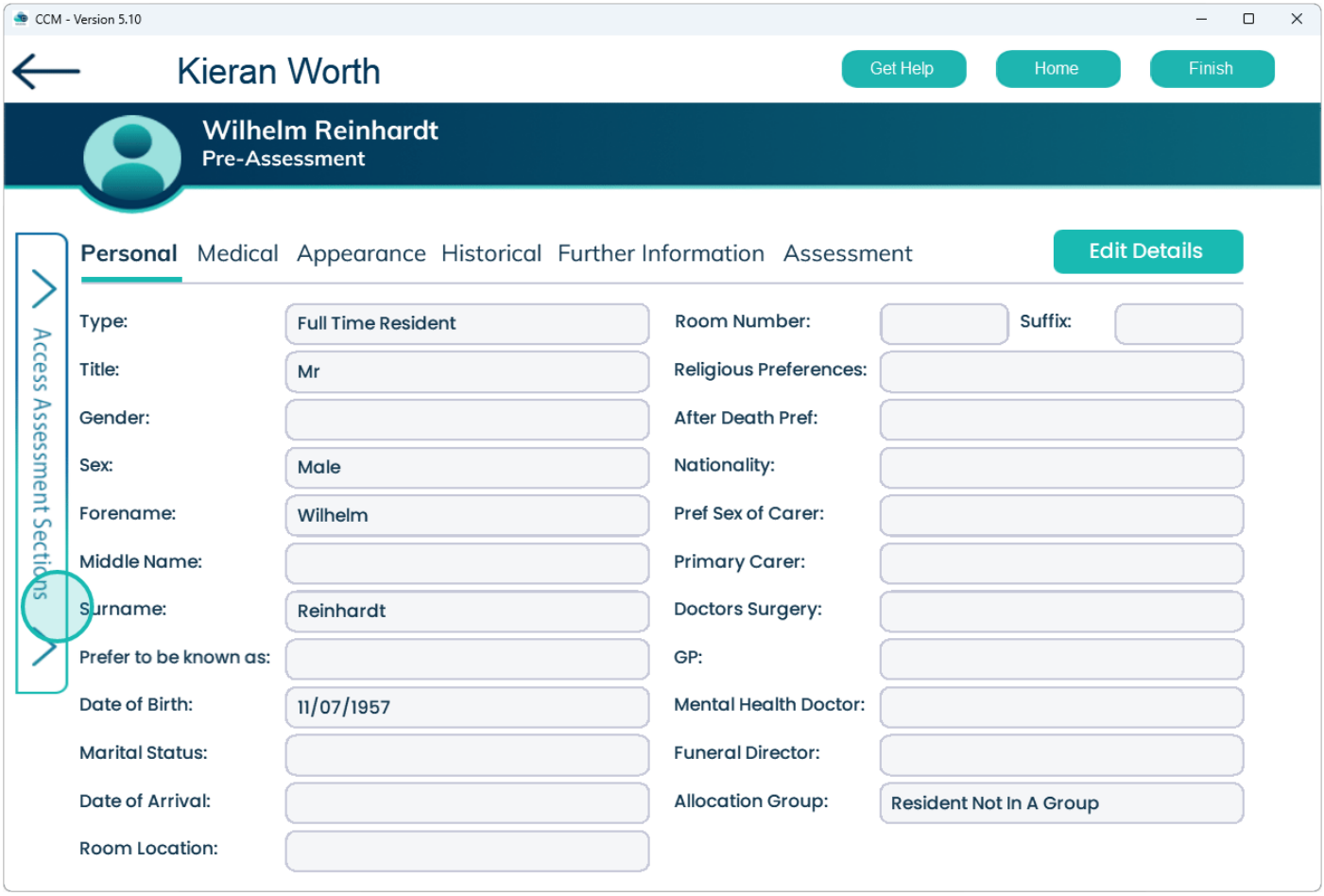
Complete the Care Review if required



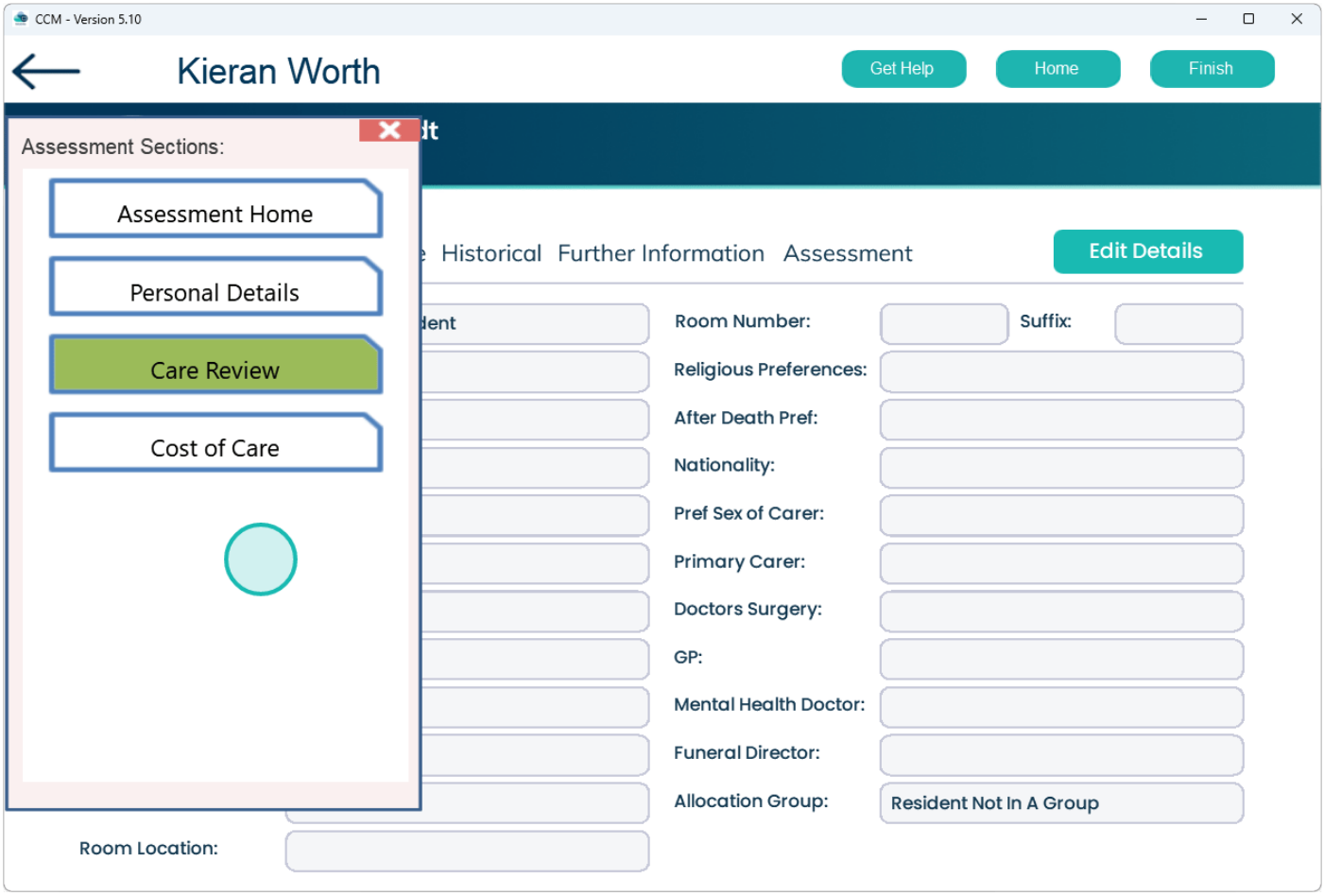
Select the back button to return if a Care Review is not required



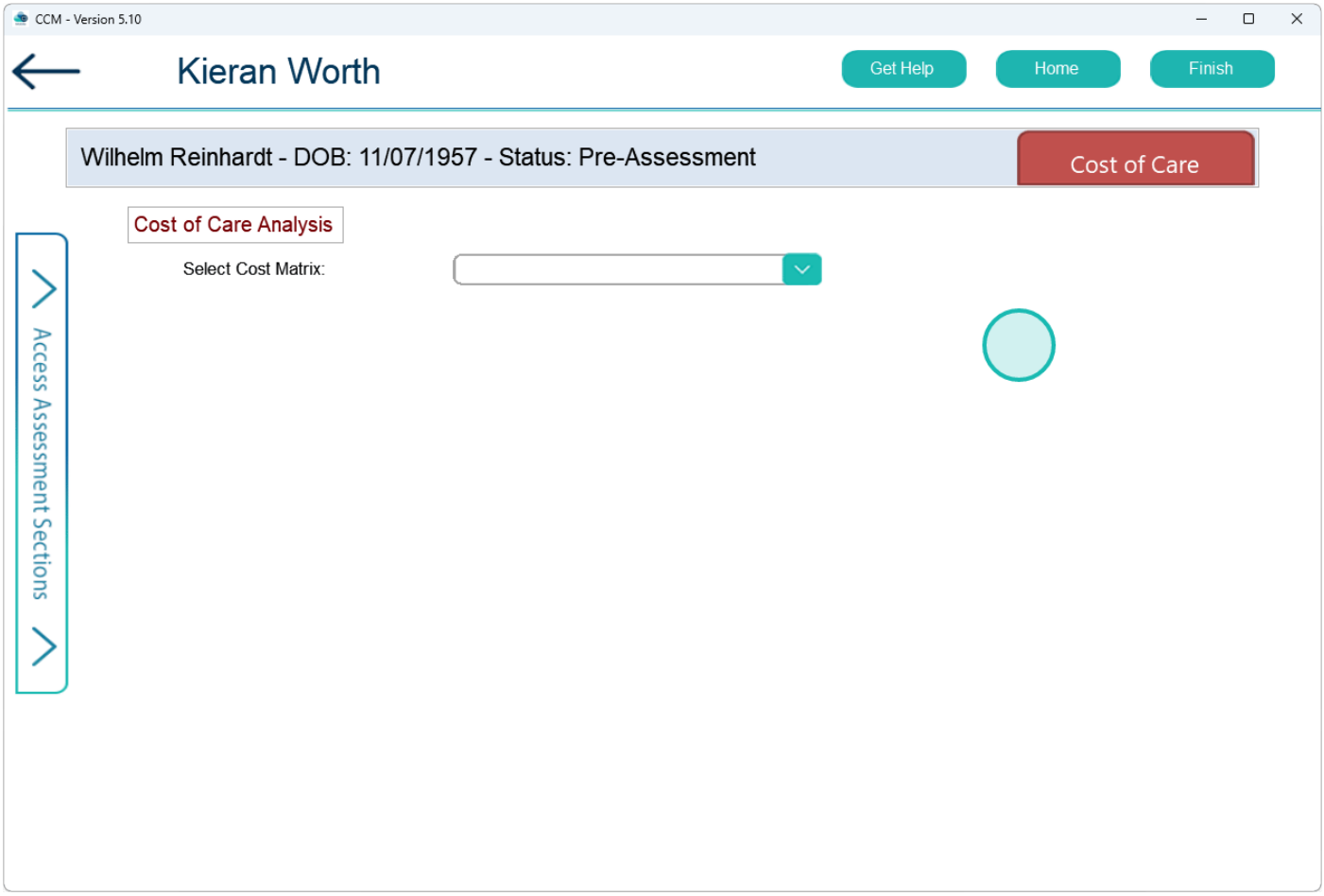
Reopen the Access Assessment menu



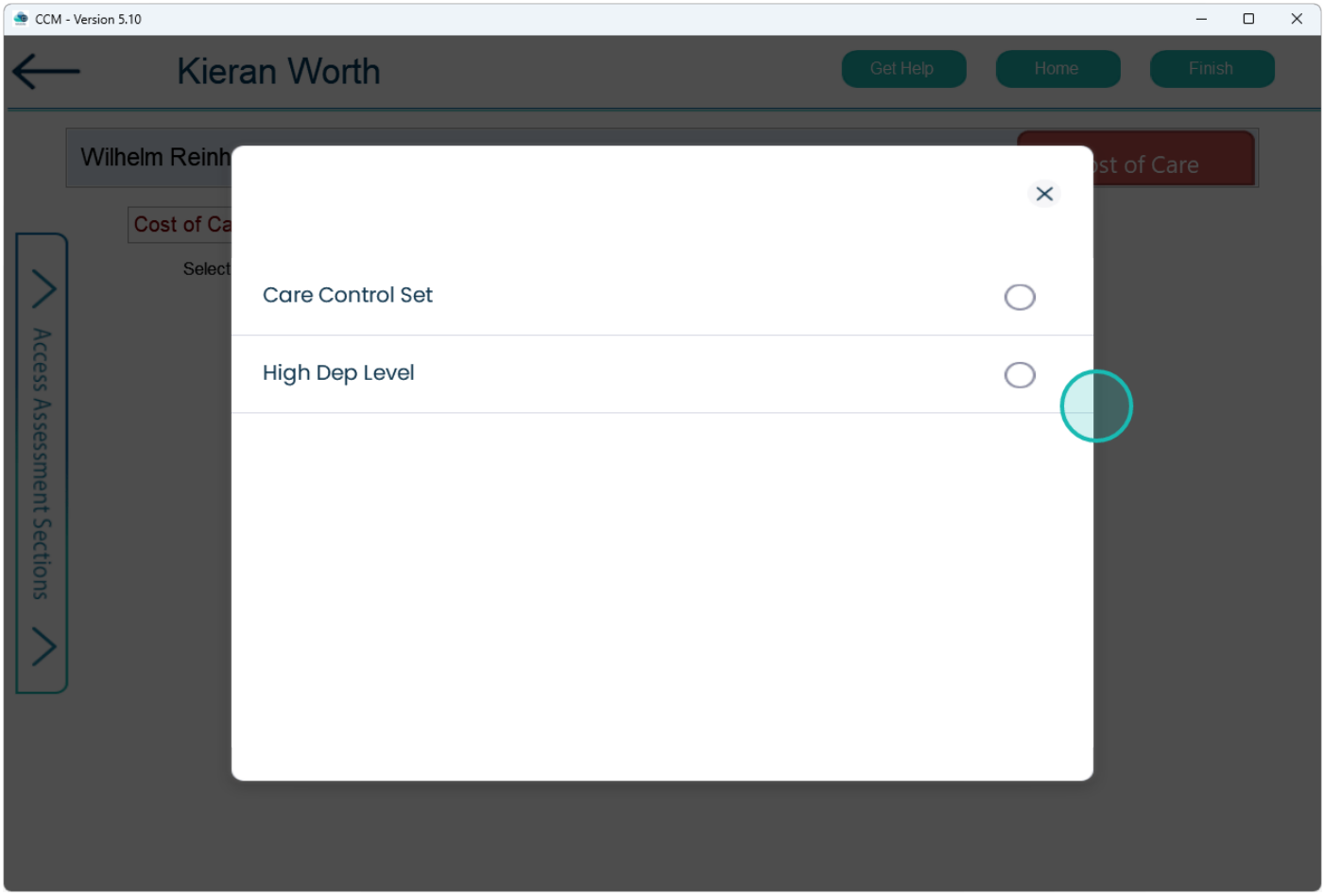
Select Cost of Care to view pricing information



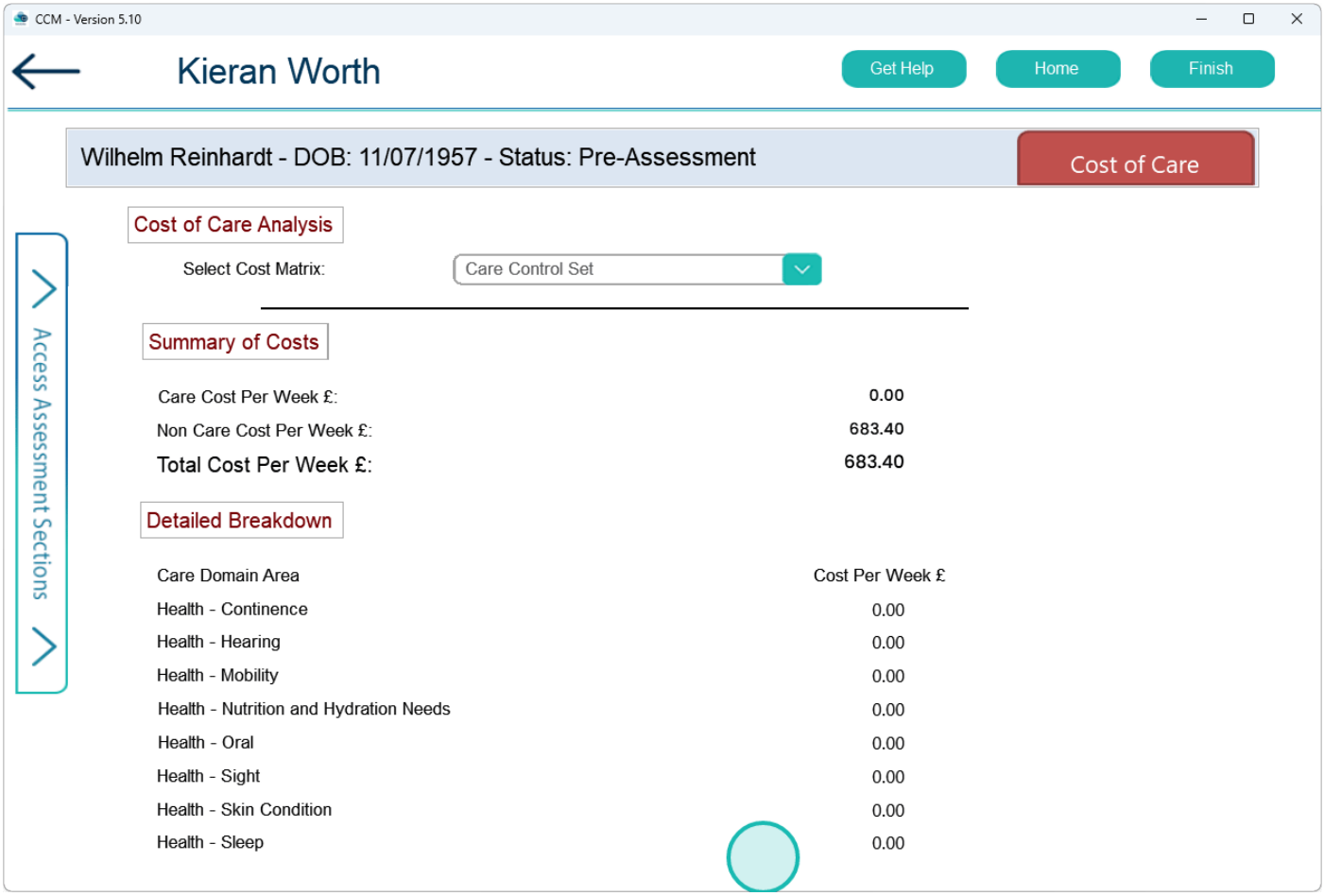
Open the Cost Matrix dropdown to view available pricing options



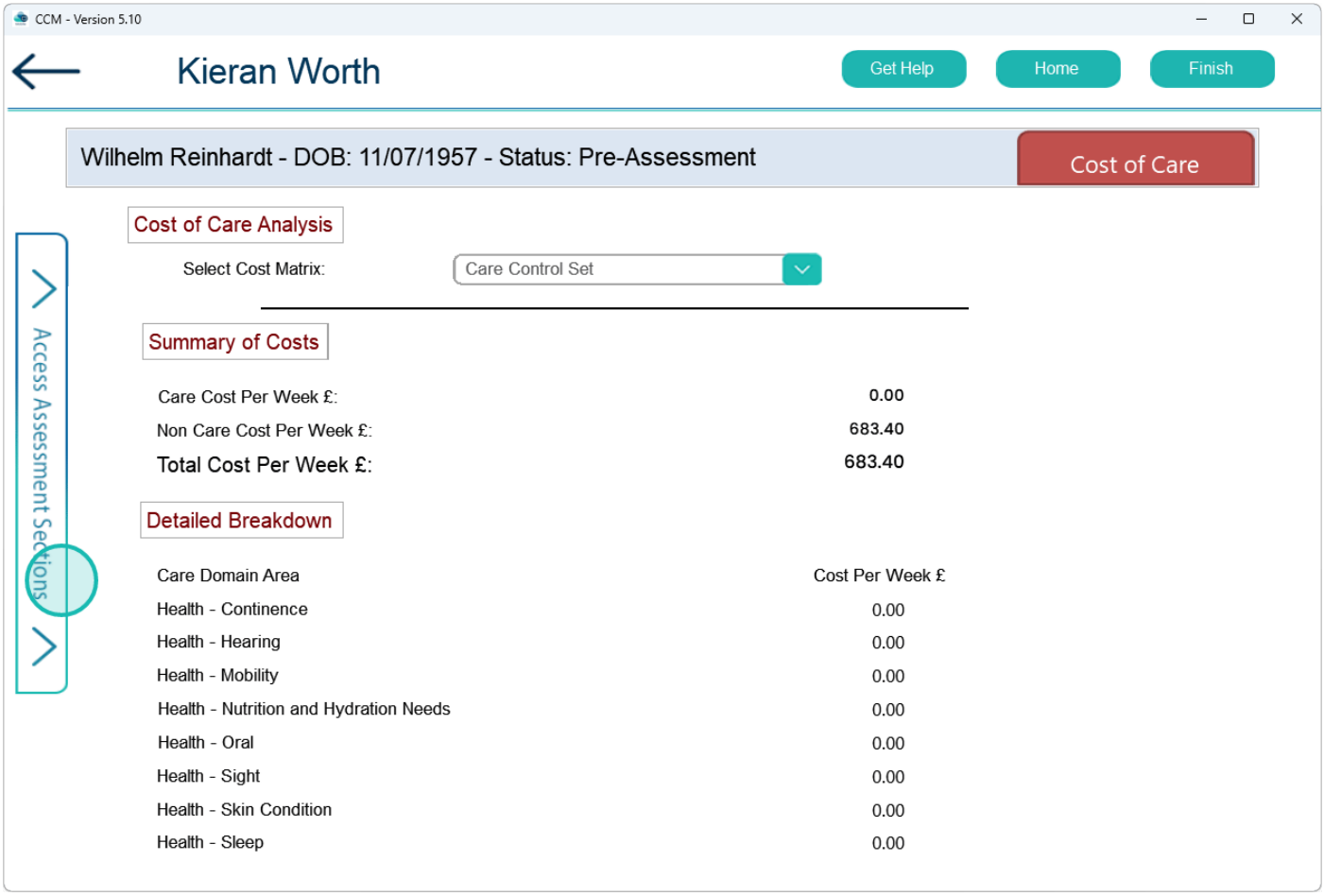
Select the appropriate cost option to discuss with the service user or enquirer



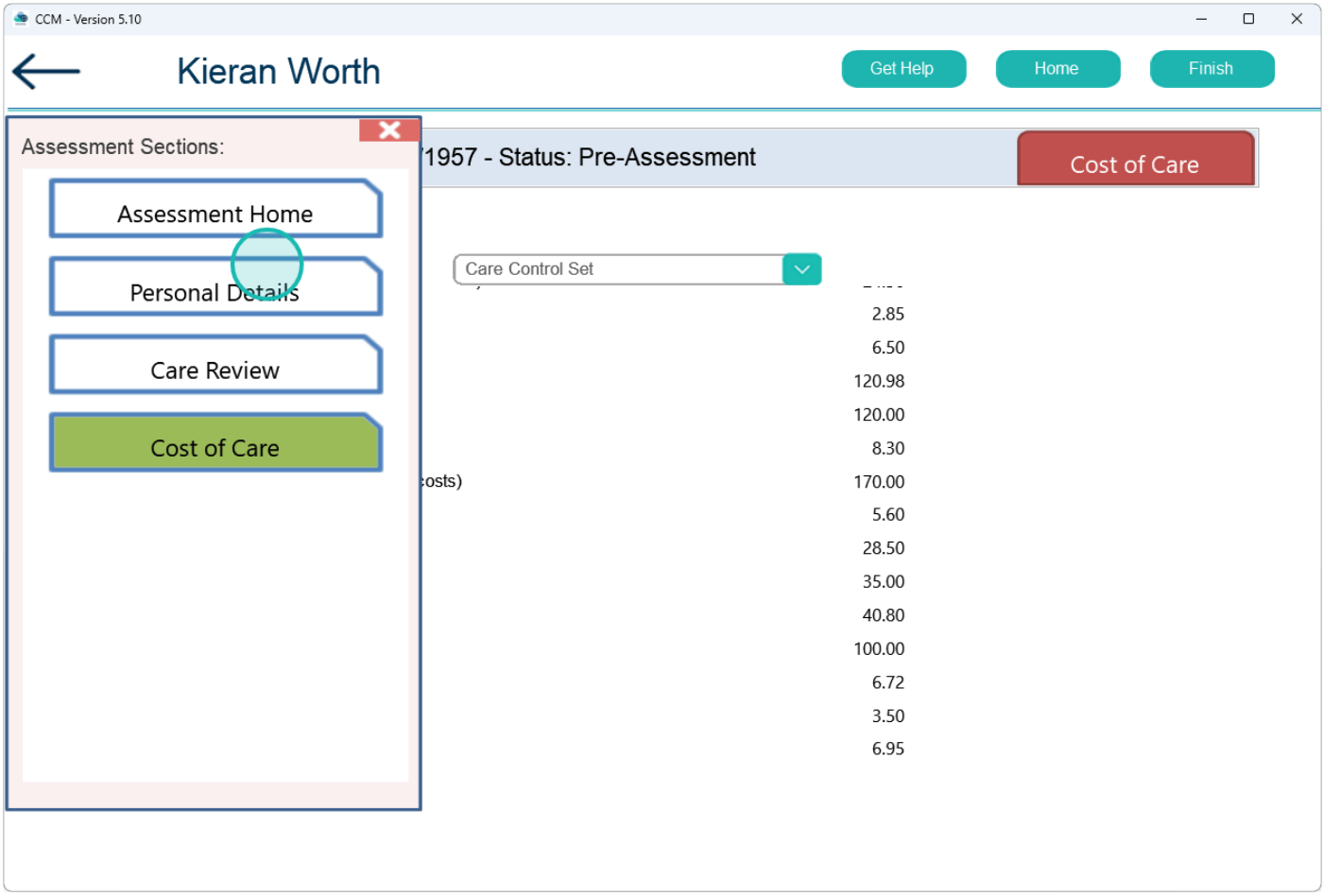
Review and explain the cost of care details to the service user or enquirer



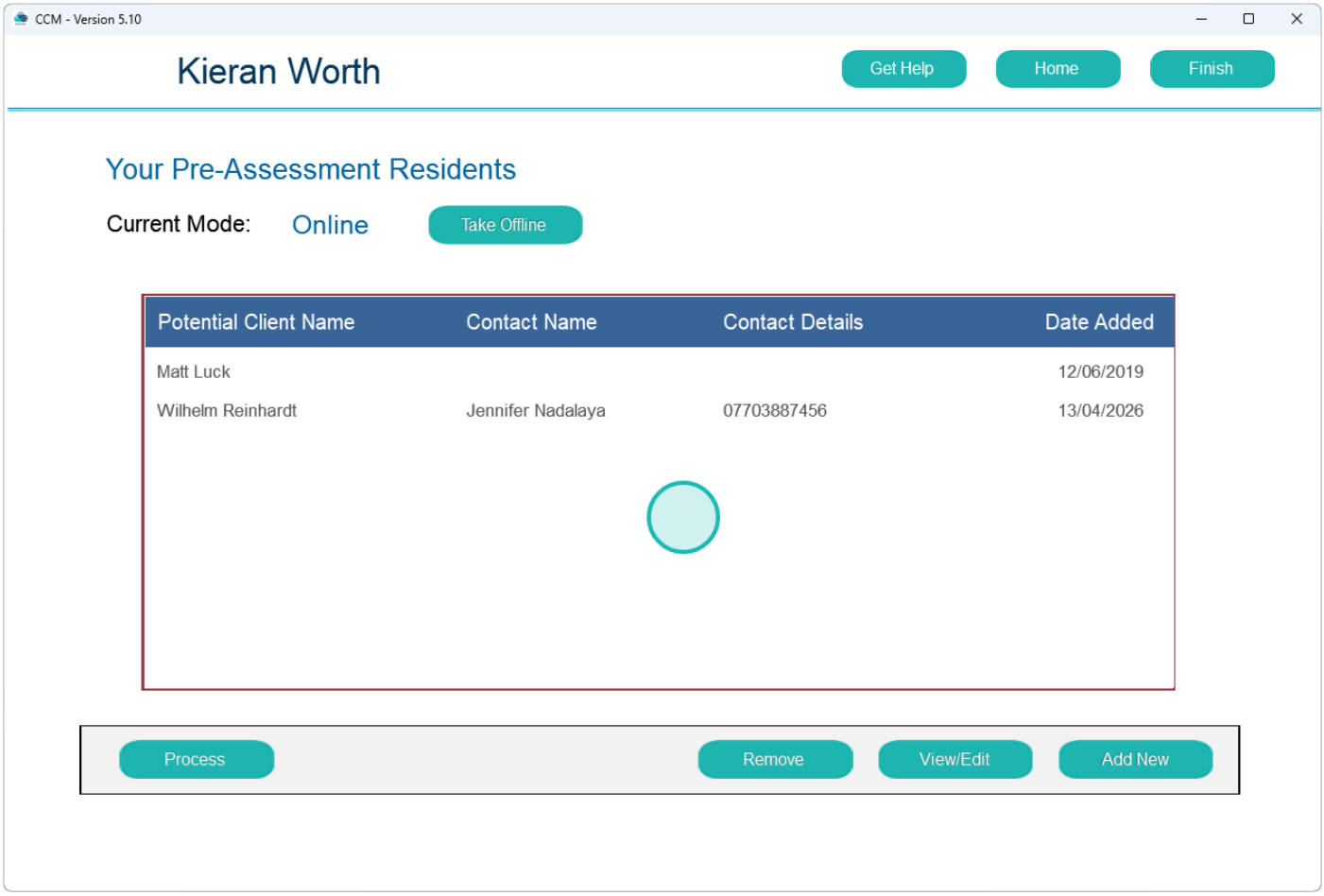
Open the Access Assessment menu again



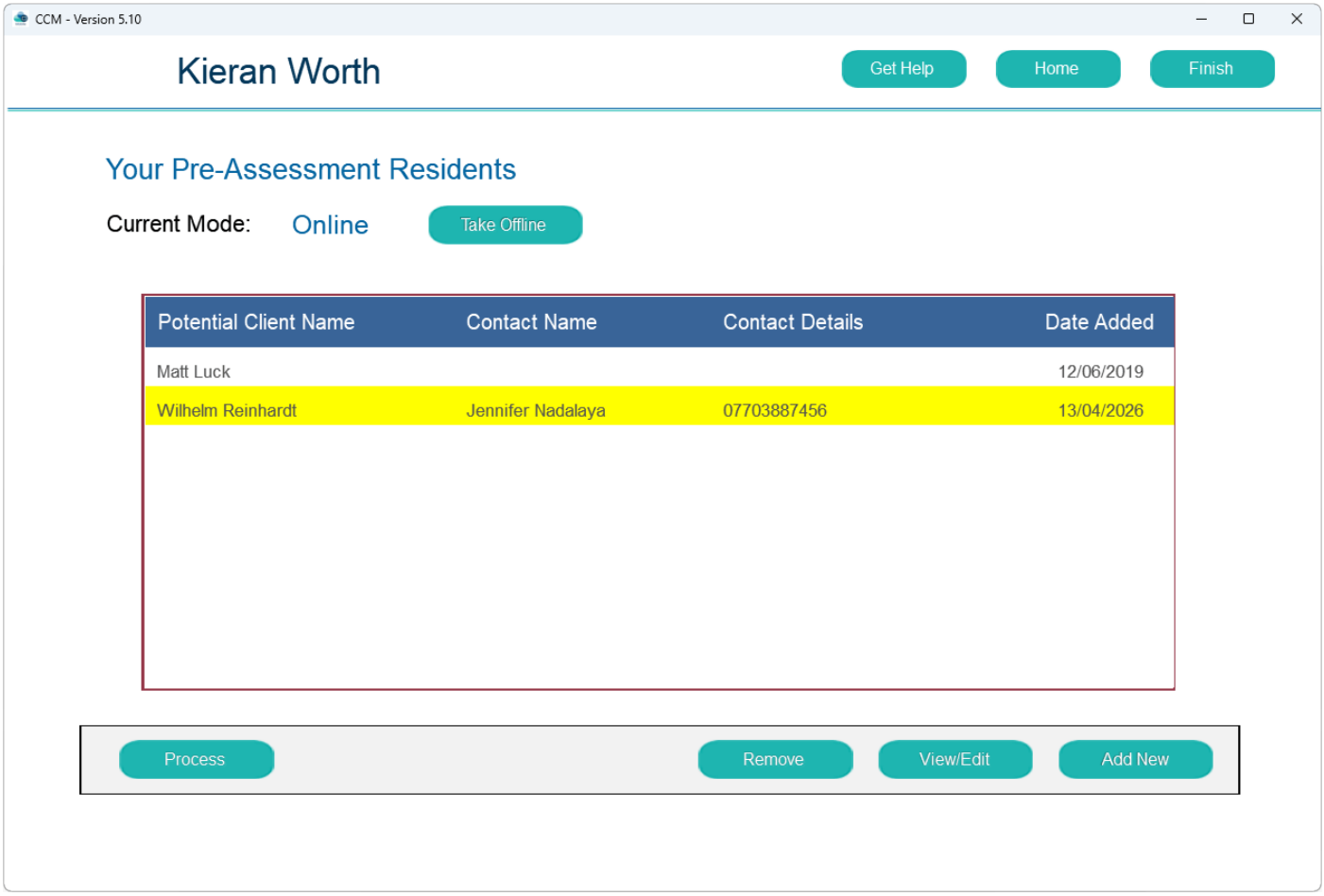
Select Assessment Home to return to the main assessment screen



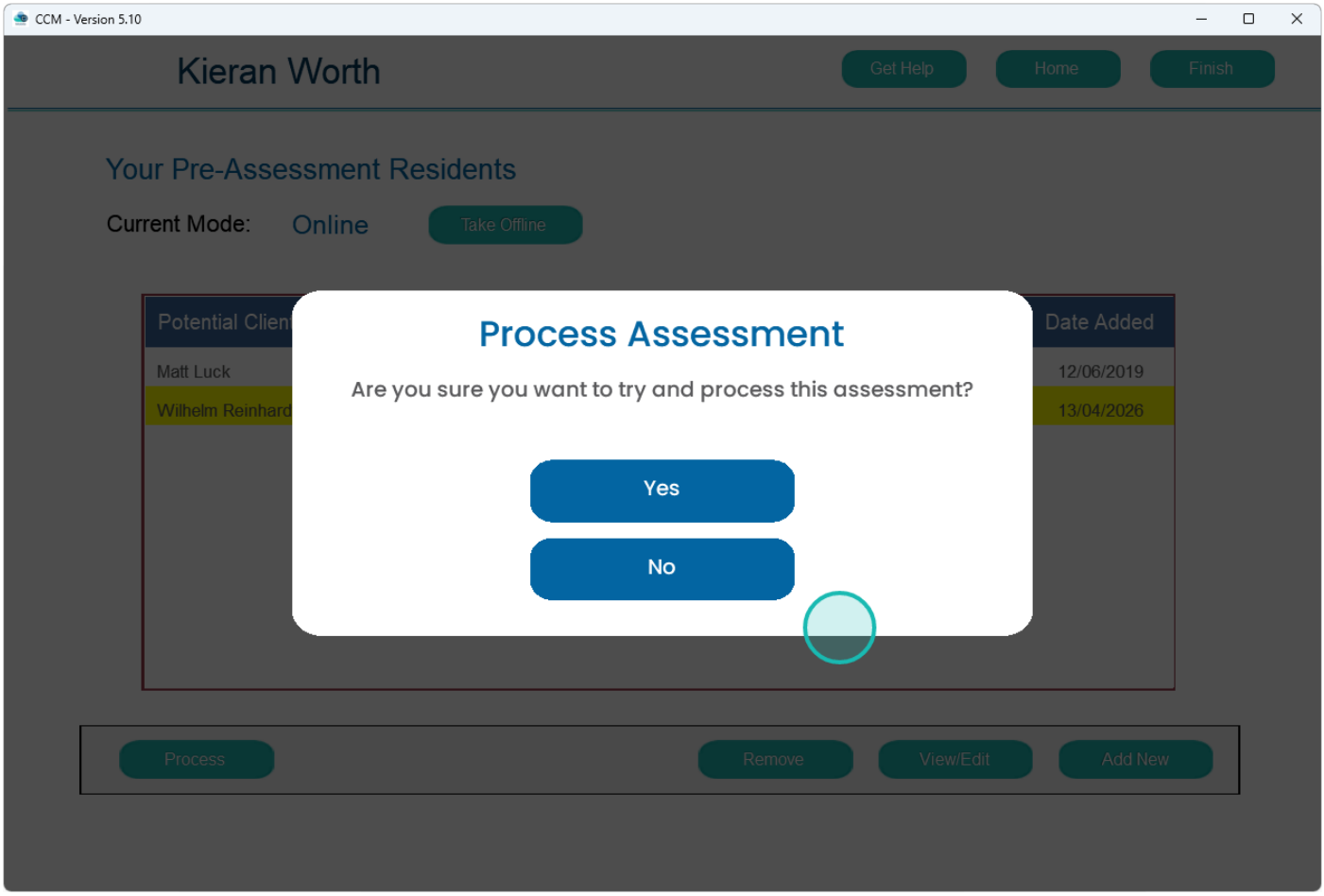
Select the potential client name again to continue the process



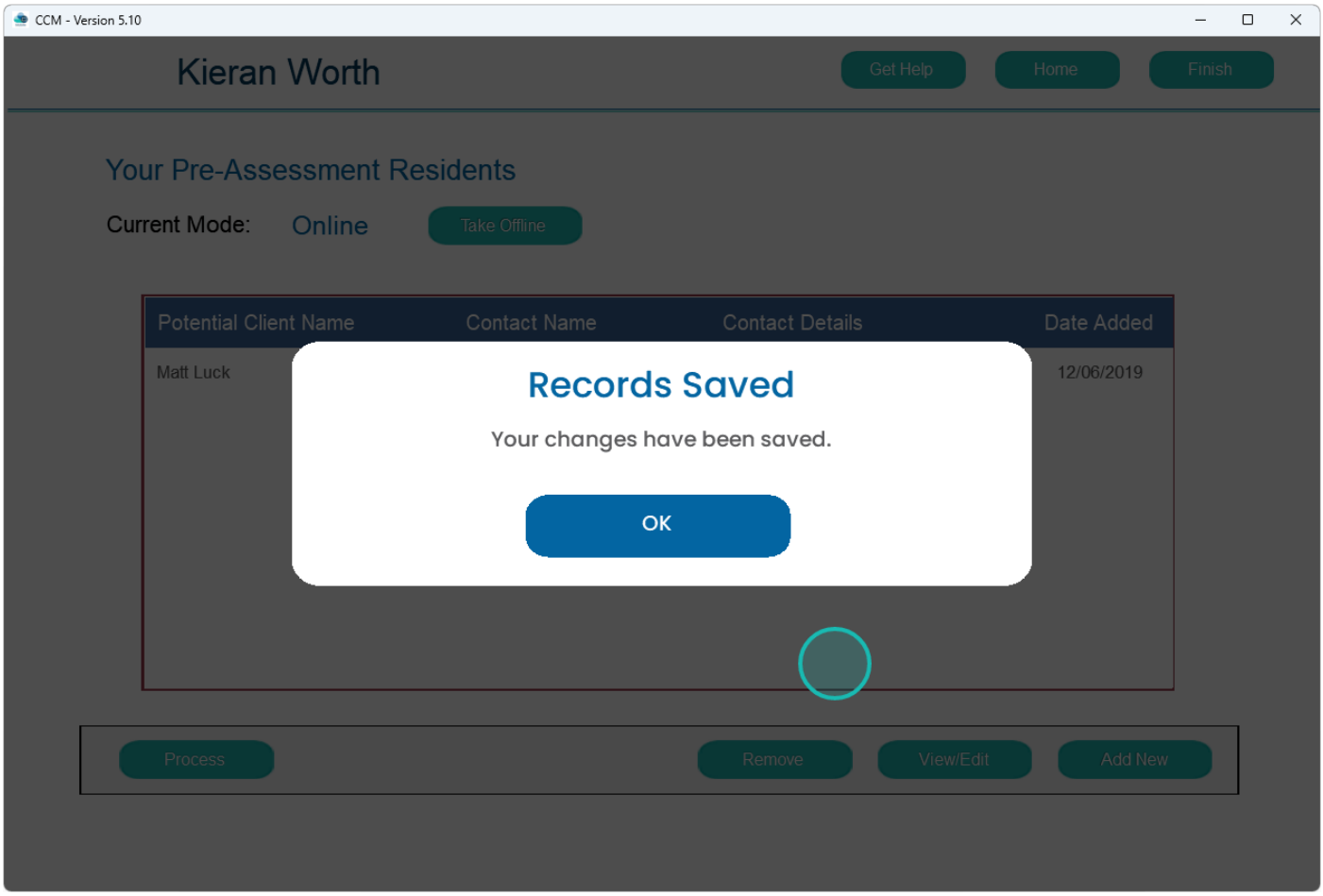
Review the assessment details before proceeding



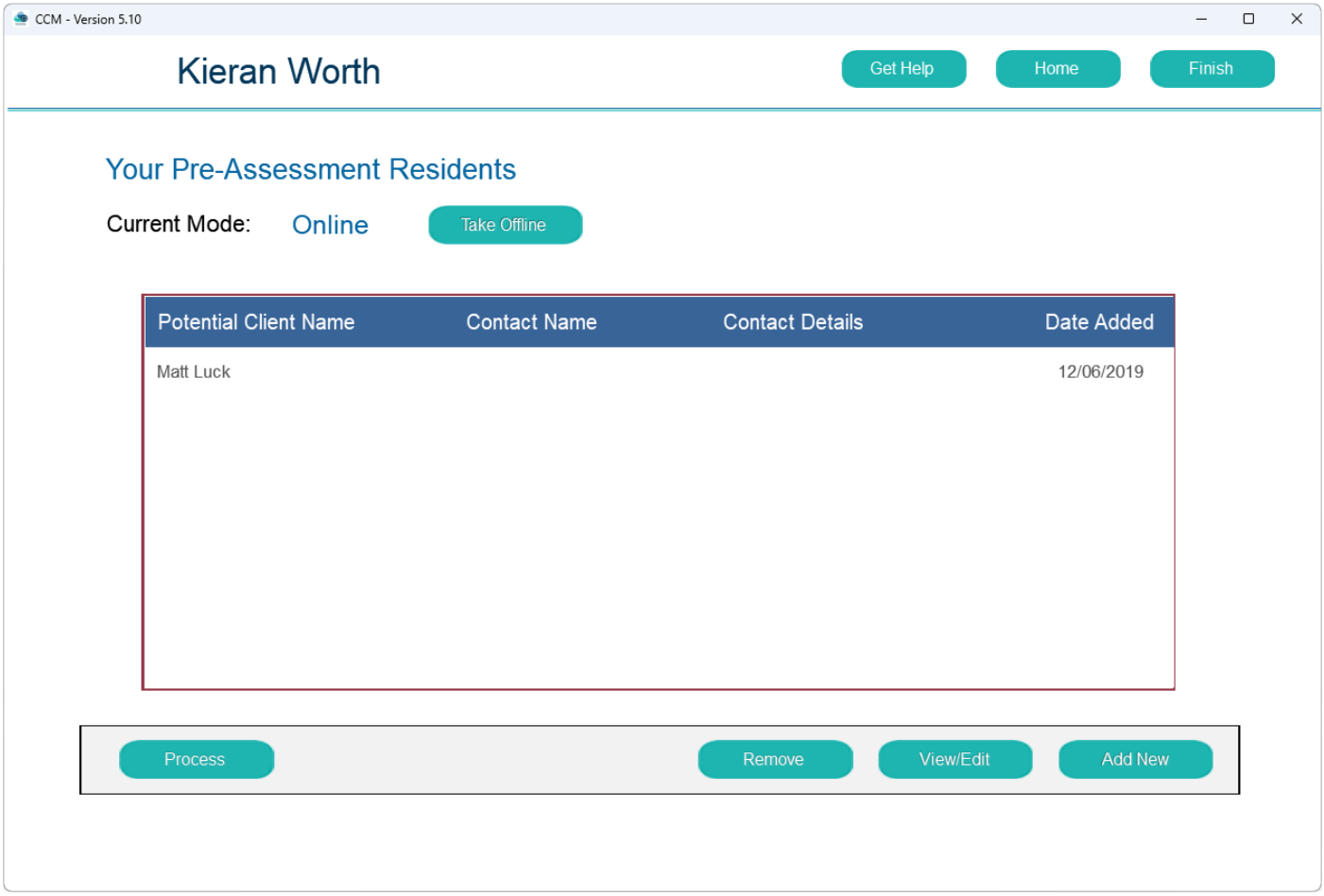
Select Yes to confirm and process the assessment



Allow the system to save the record and return to the CRM platform to continue setup



Confirm the assessment has been processed and continue in the CRM system



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- Happy
- Normal
- Sad

Table of Contents

↑ Top