How to create a new Supervision Template in Cloud

Supervisions · https://cclearninghub.co.uk/docs/how-to-create-a-new-supervision-template-in-cloud/

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Kieran Worth

The Supervision Templates feature in the Care Control HR App allows you to create and manage custom templates for staff and supervisor supervisions. These templates form the structure of supervision meetings, enabling managers to design standardised, repeatable forms that capture key information across all staff reviews.

This guide walks you through the full process of creating a supervision template — from opening the HR App and accessing Supervision Templates, to adding questions, setting mandatory fields, choosing question types, and assigning whether each question is completed by staff or supervisors. You'll also learn how to add a variety of question styles including text fields, yes/no questions, rating scales, and drop-down selections, providing flexibility for all supervision formats.

Using the Supervision Template creator ensures every meeting follows a structured format, supports consistent staff performance monitoring, and maintains clear documentation for compliance and quality assurance. Templates can be reused, updated, and expanded as supervision needs evolve, helping streamline the HR process and maintain high standards across your organisation.

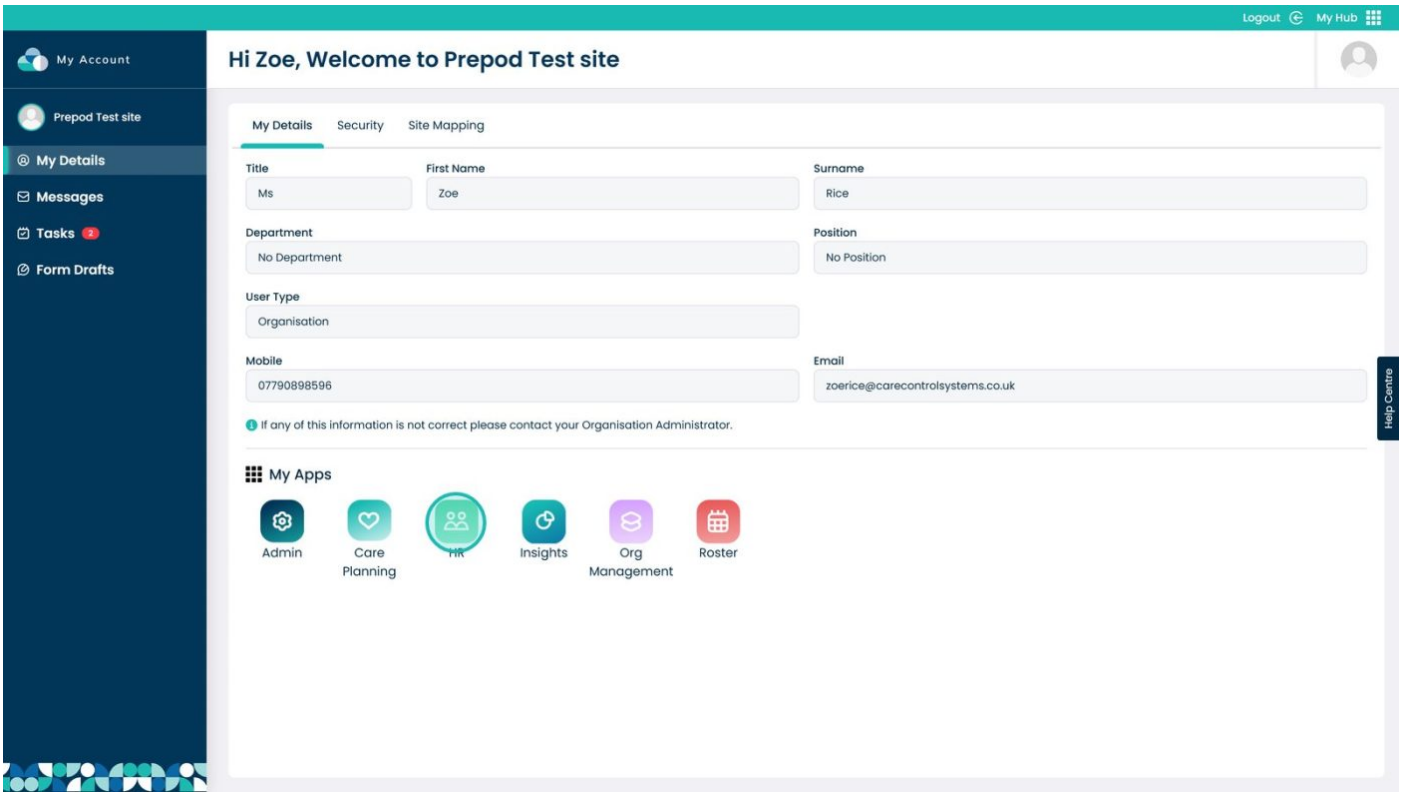
Interactive Guide

Embedded media:

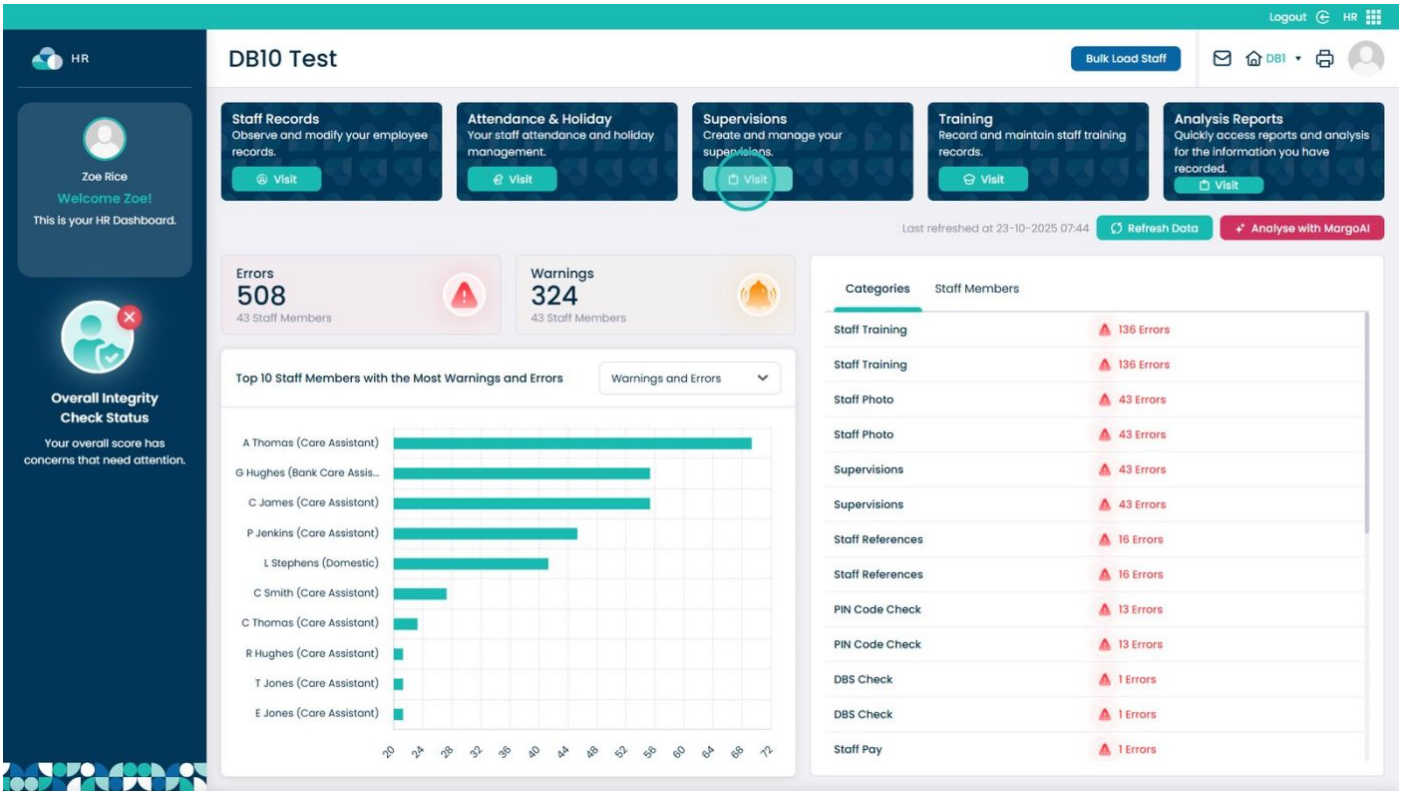
https://demo.arcade.software/2sRgRiNWeTxb8GEc4l6z?embed&embed_mobile=tab&embed_desktop=inline&show_copy_lin

Text based guide

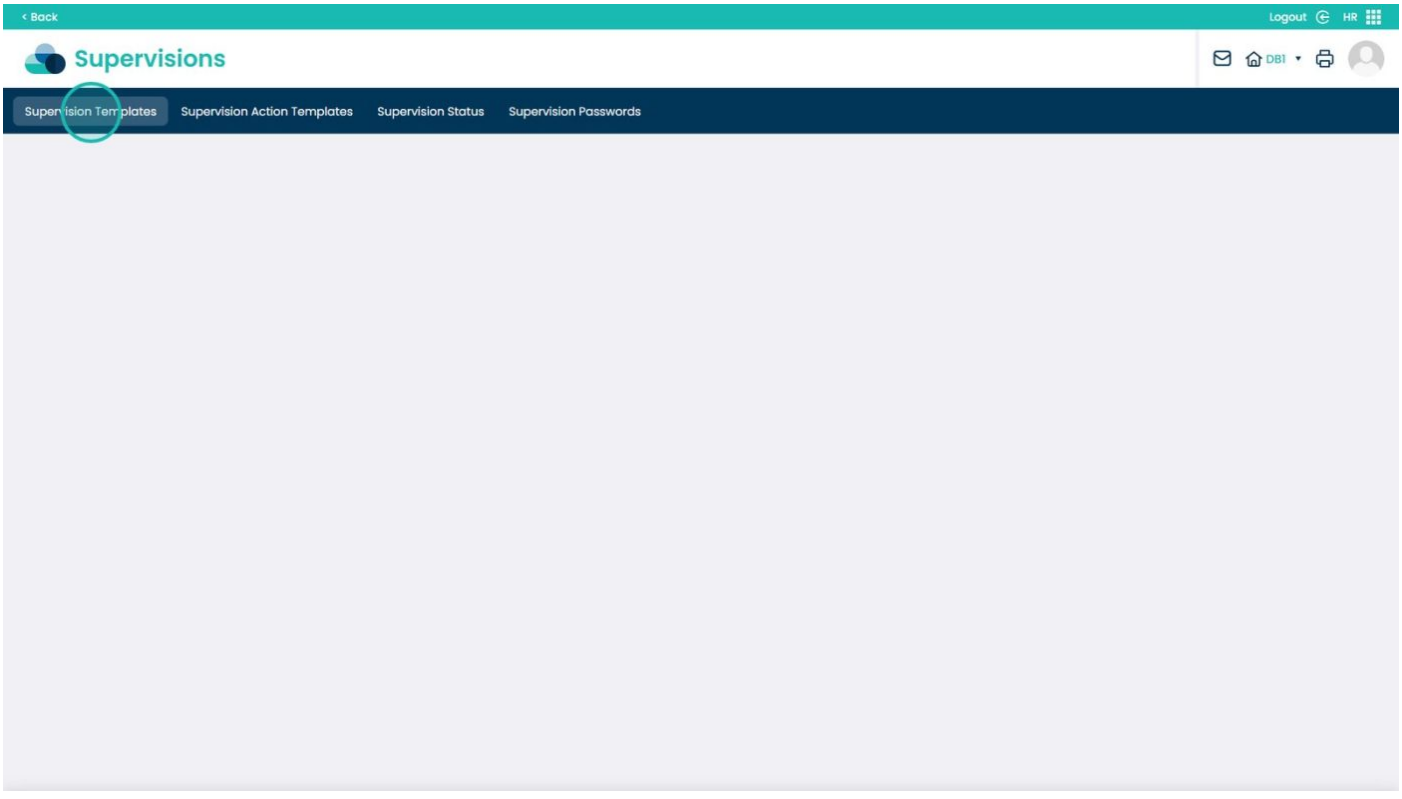
Enter the HR App



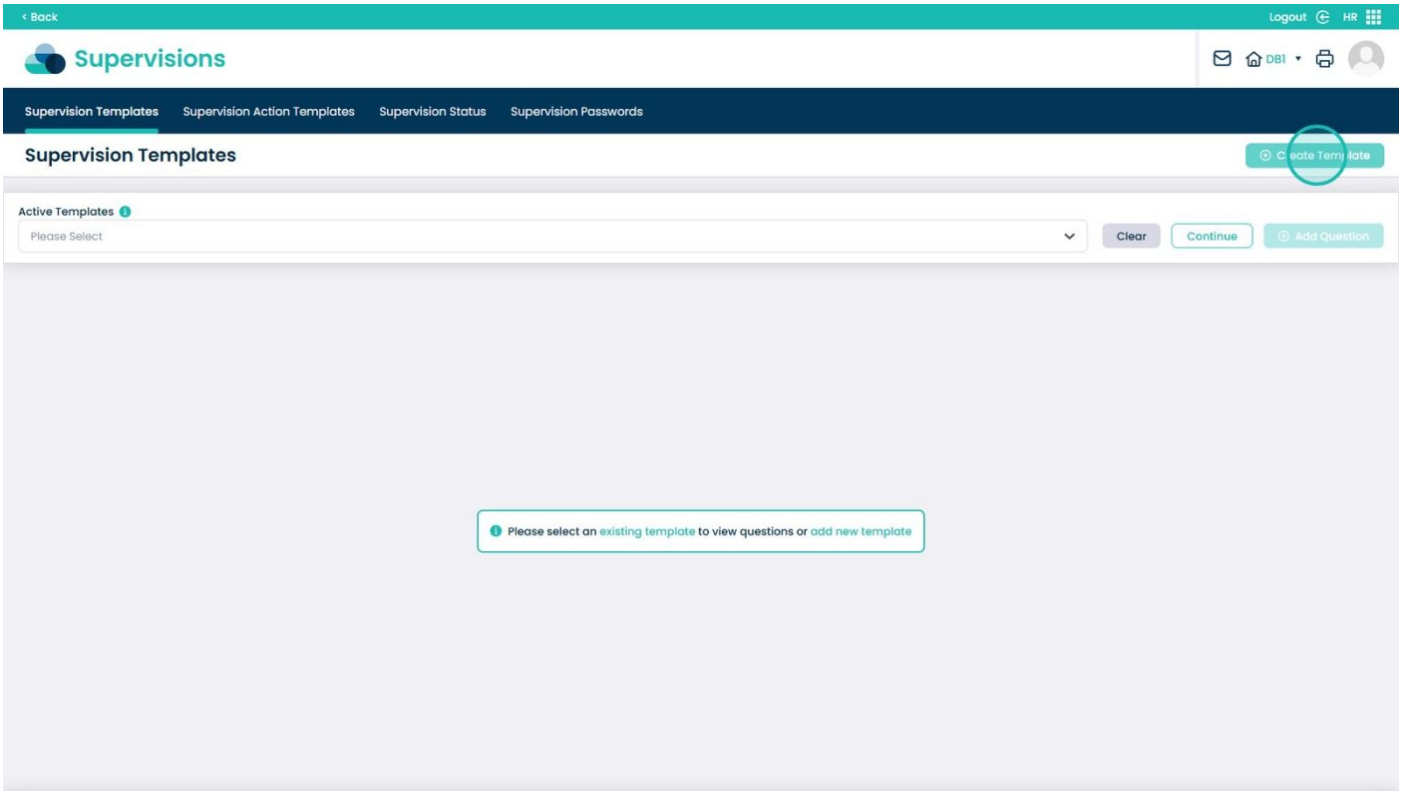
Click Visit under Supervisions



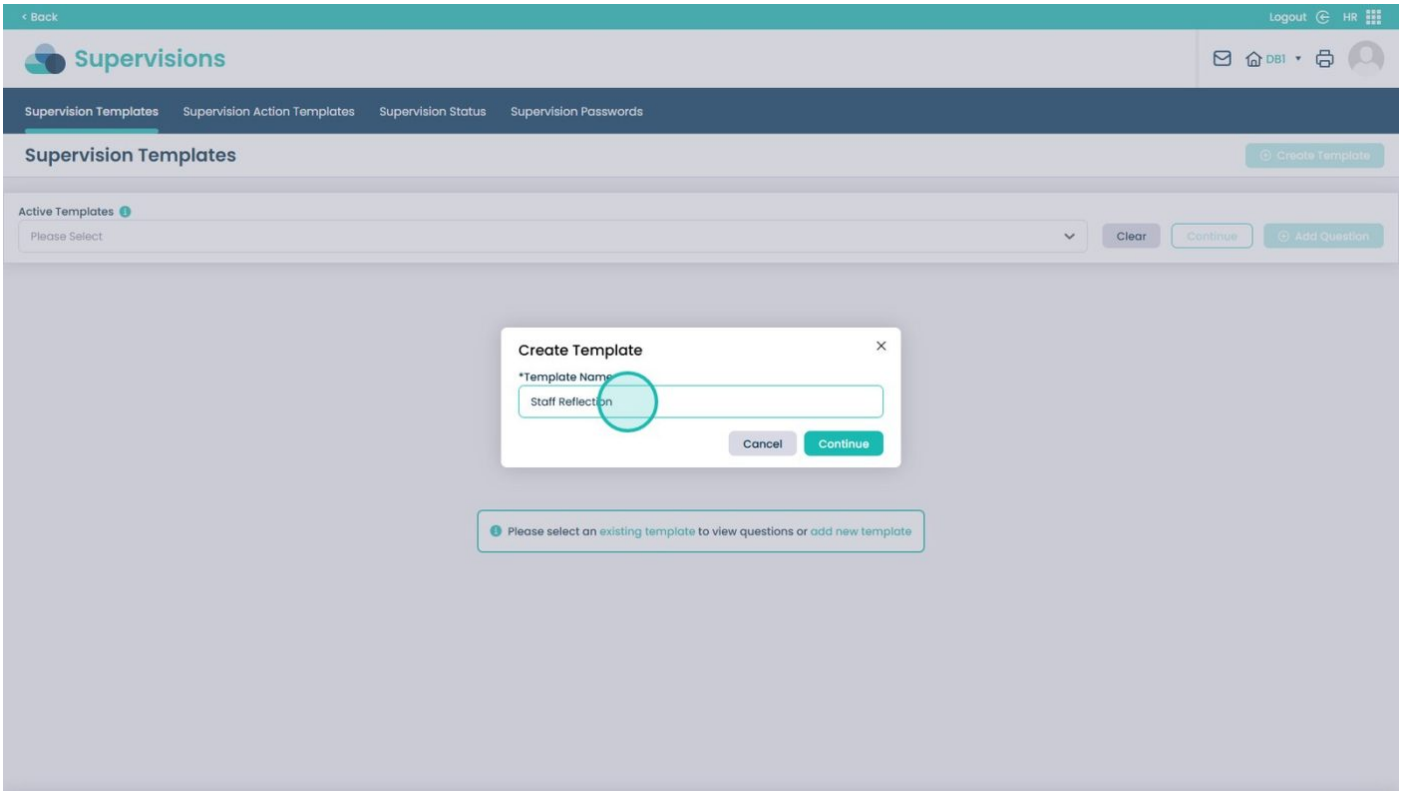
Open Supervision Templates



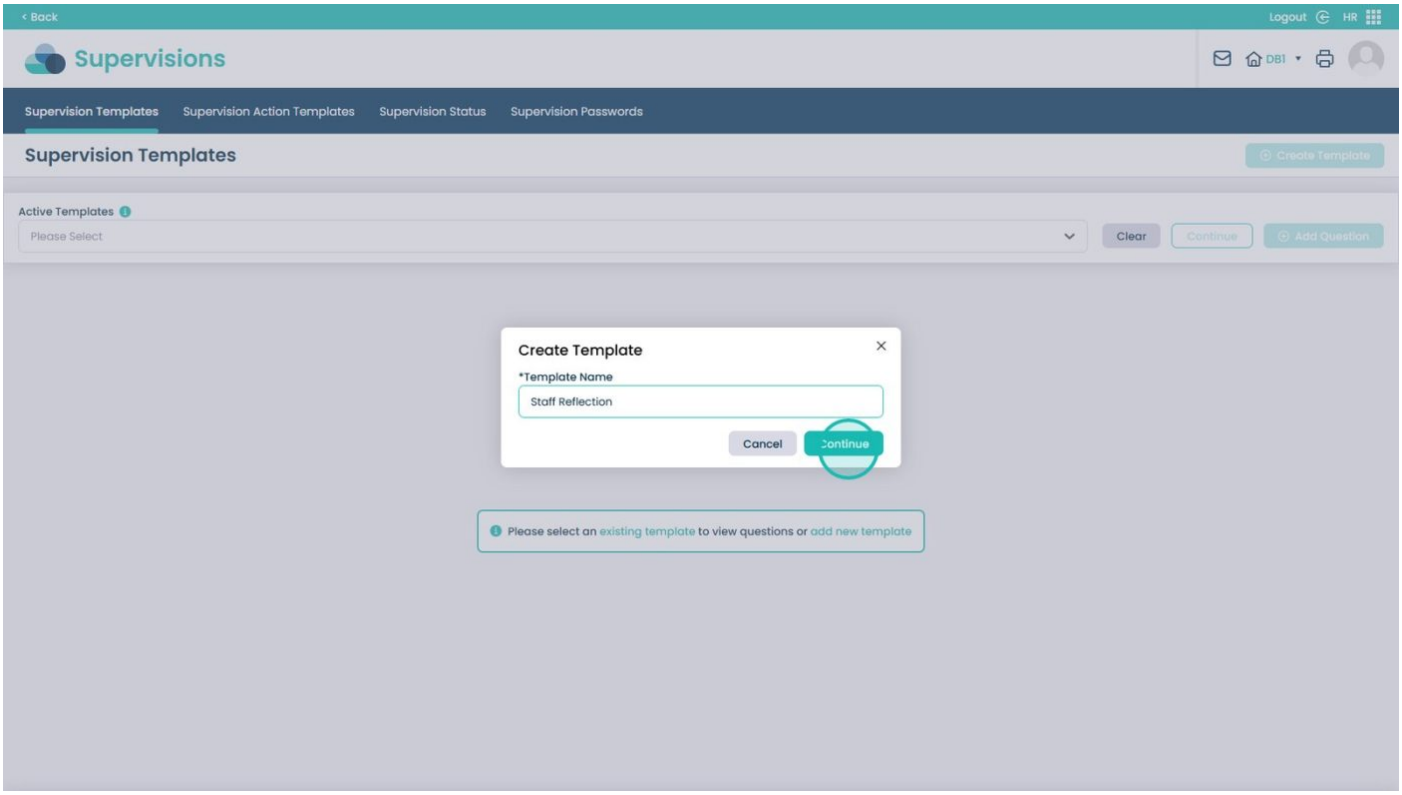
Click Create Template



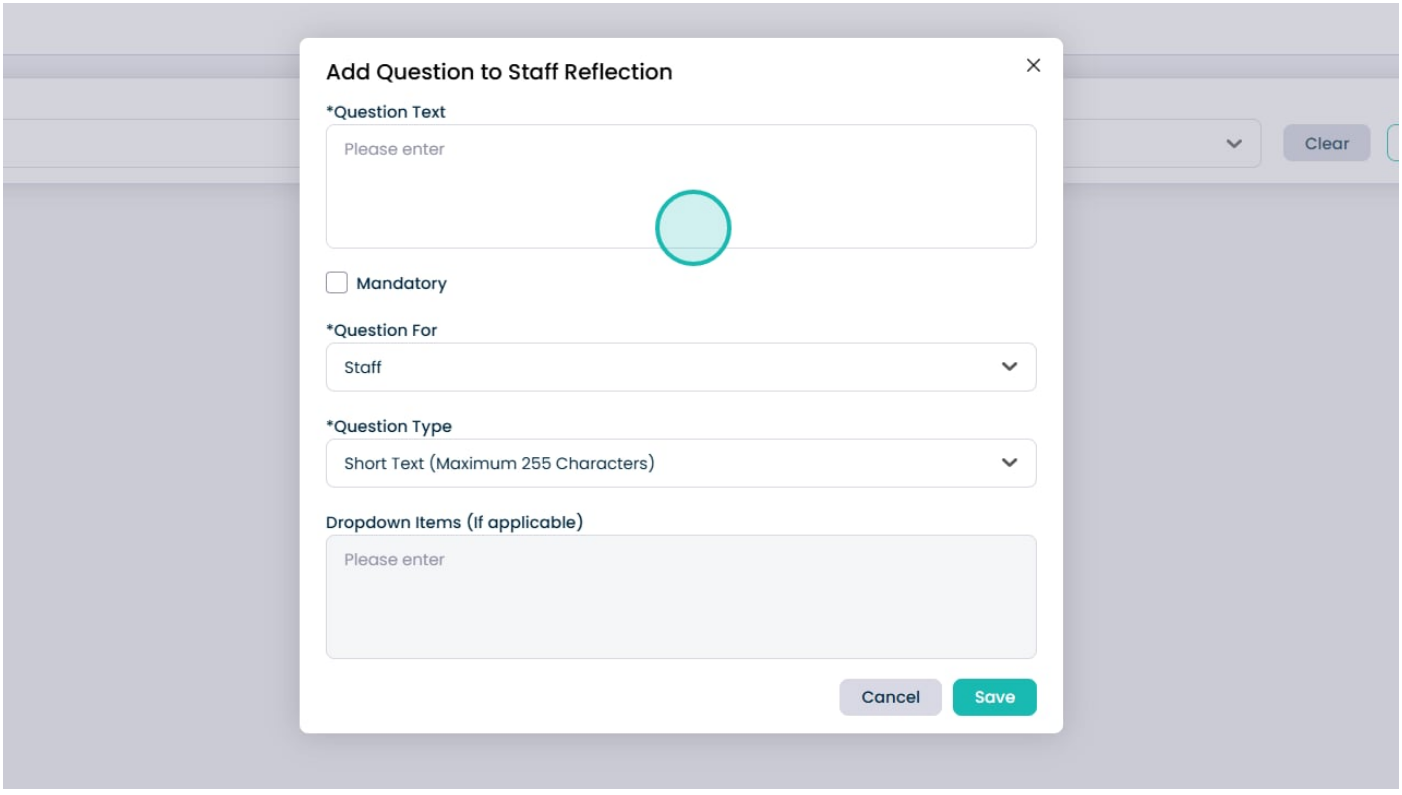
Enter the name for the template in the box



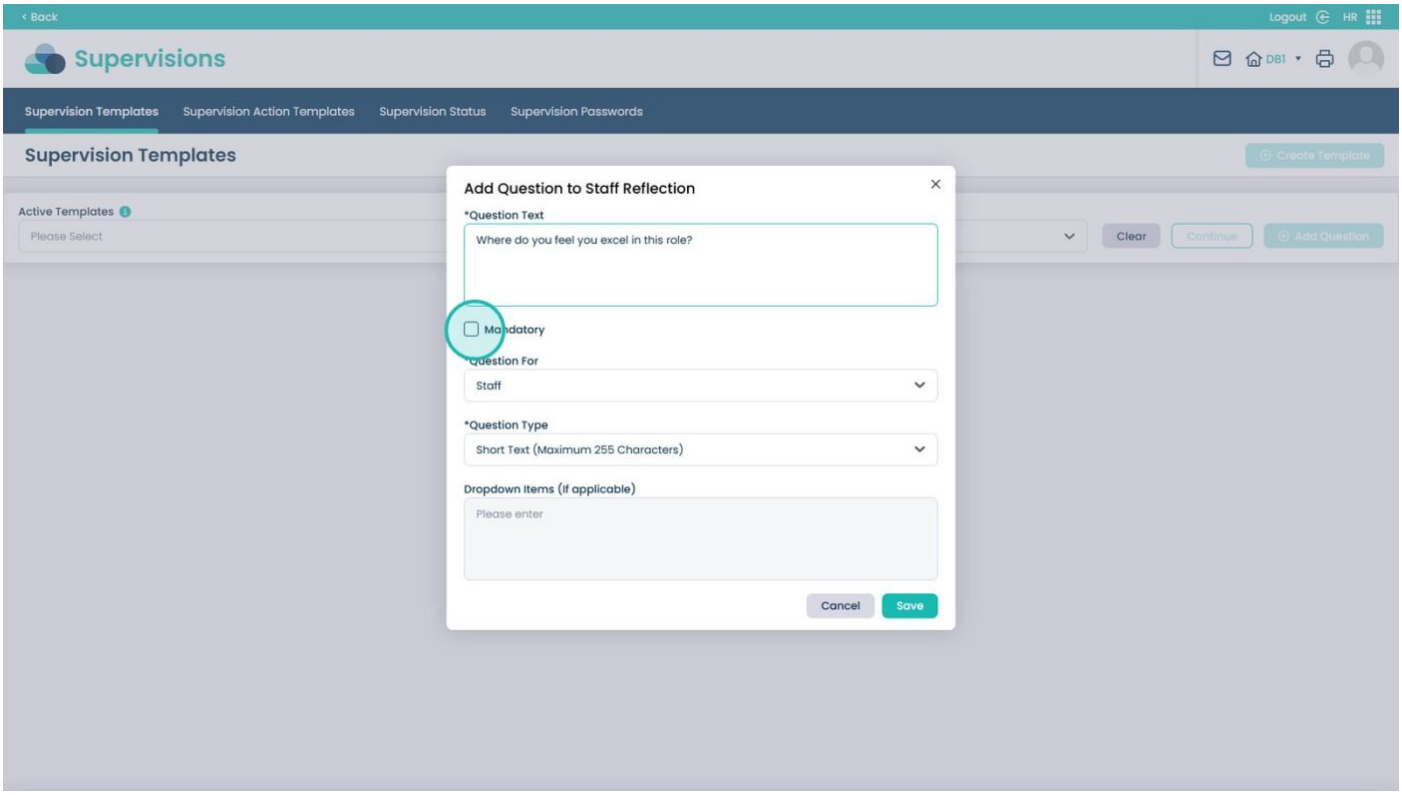
Click Continue



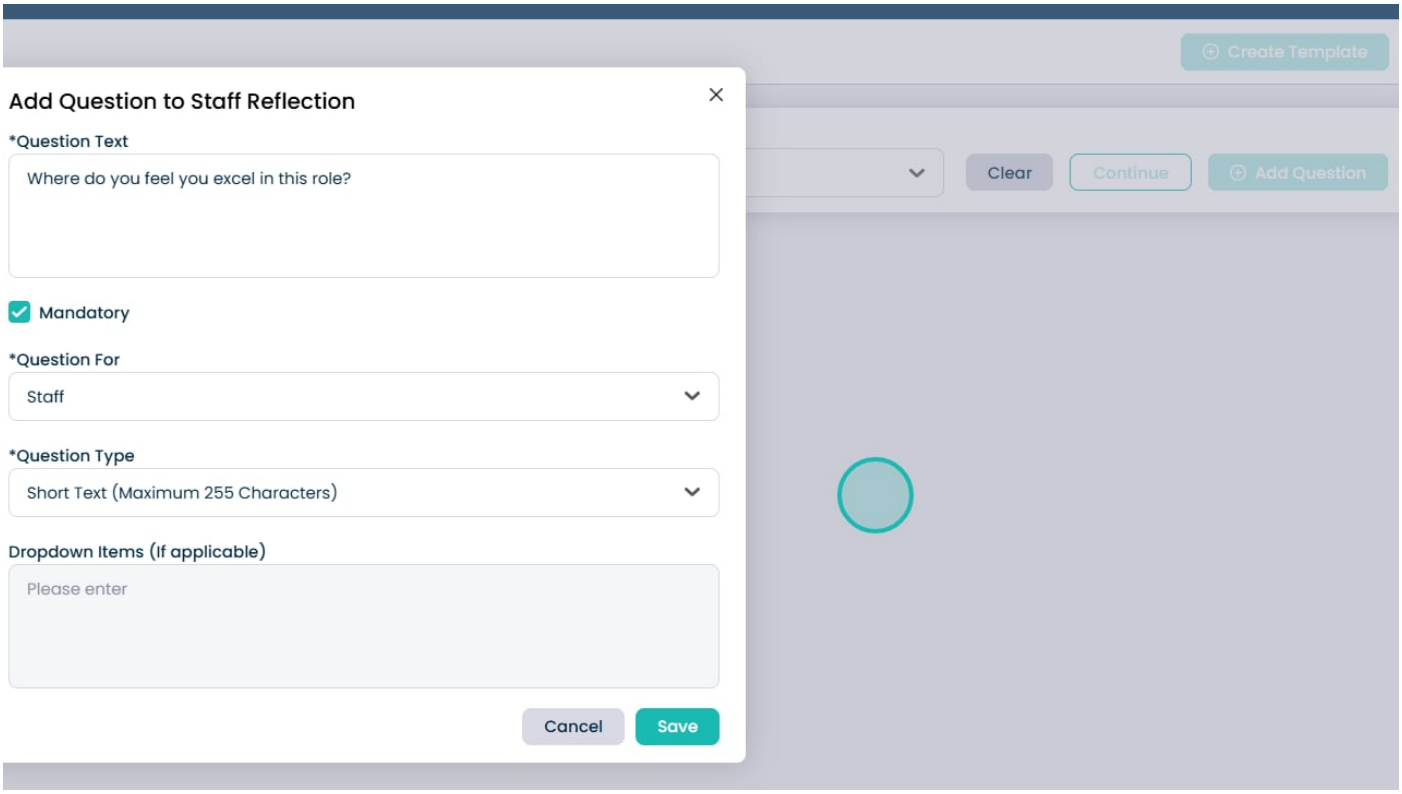
Add your initial question: enter the question text in this box



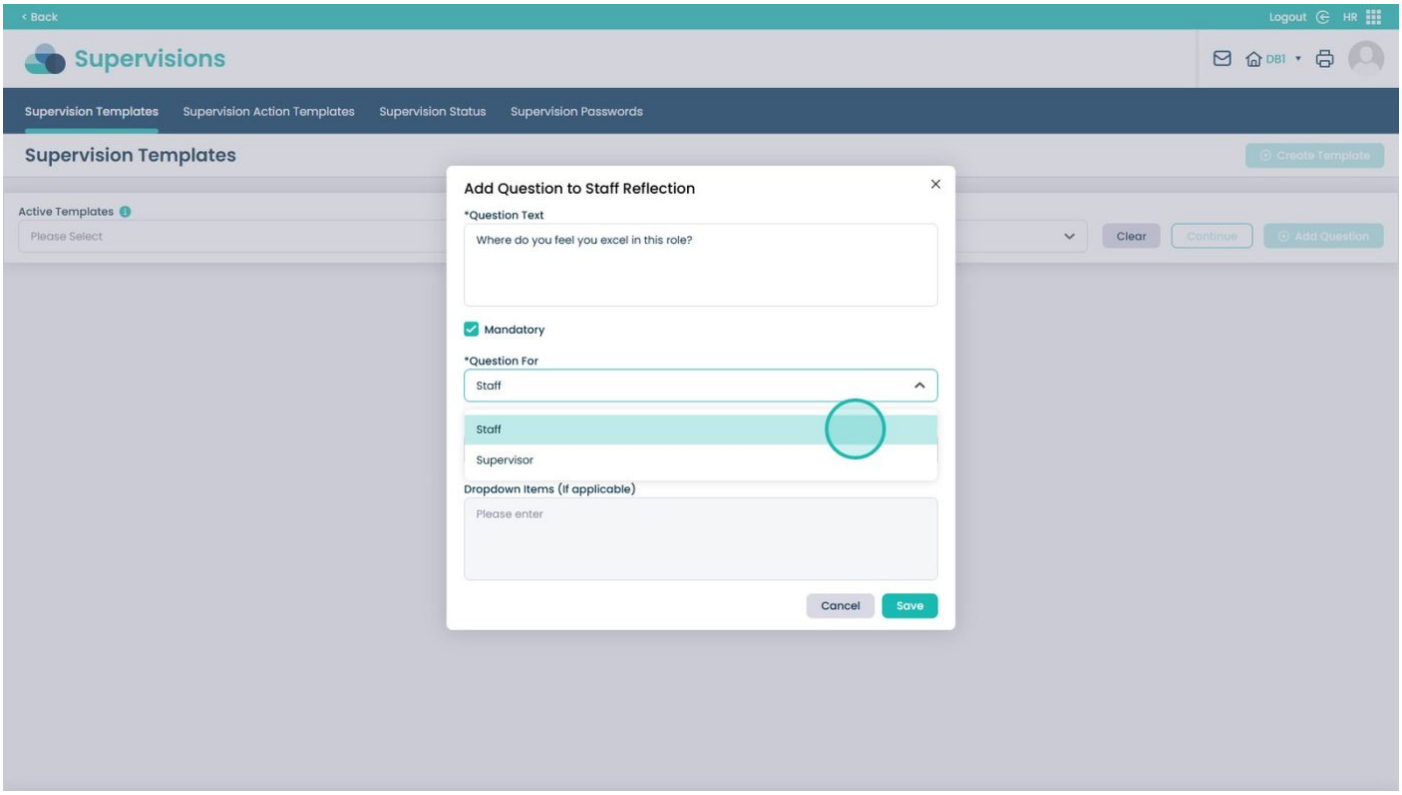
Tick this box if the question is mandatory



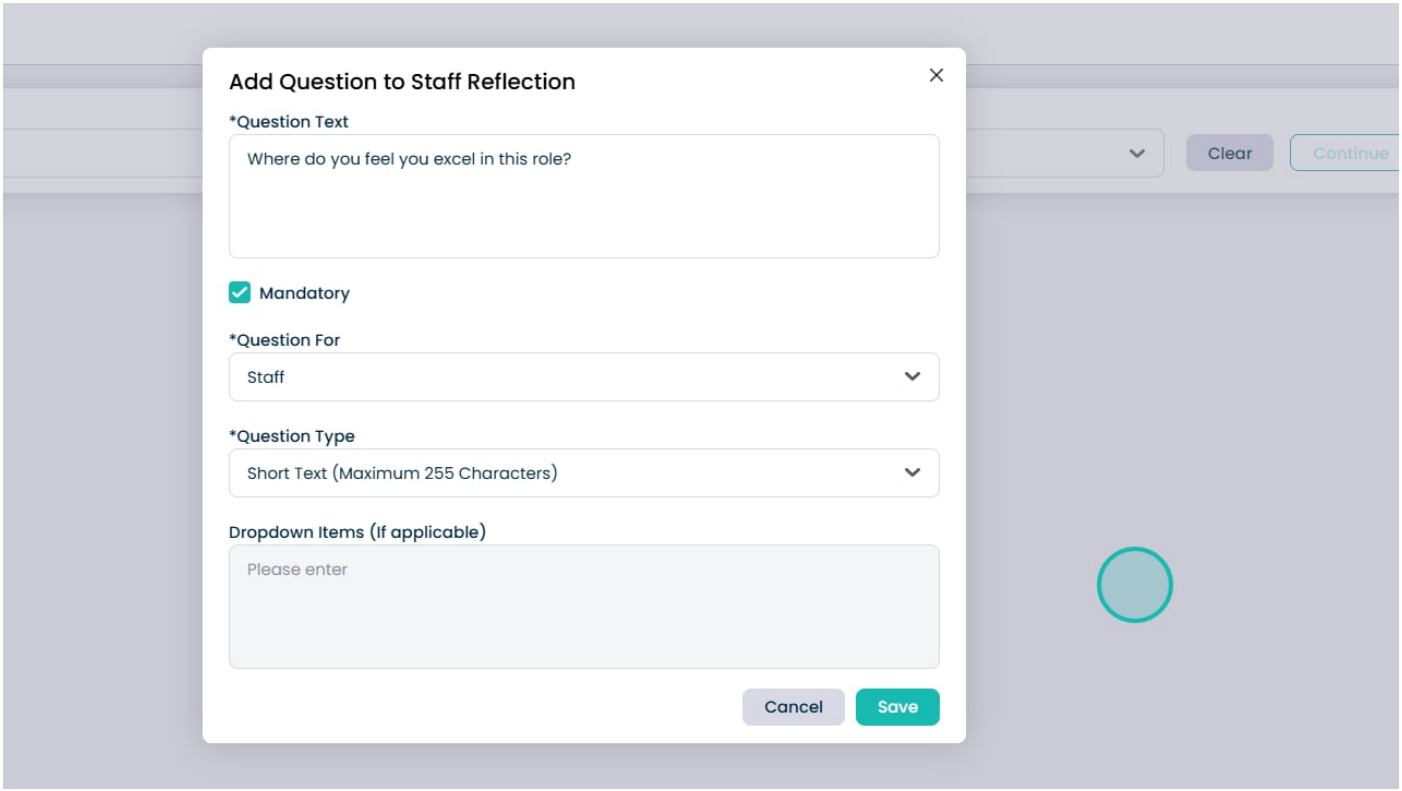
Use this drop-down to decide if the question is for staff or supervisors to complete



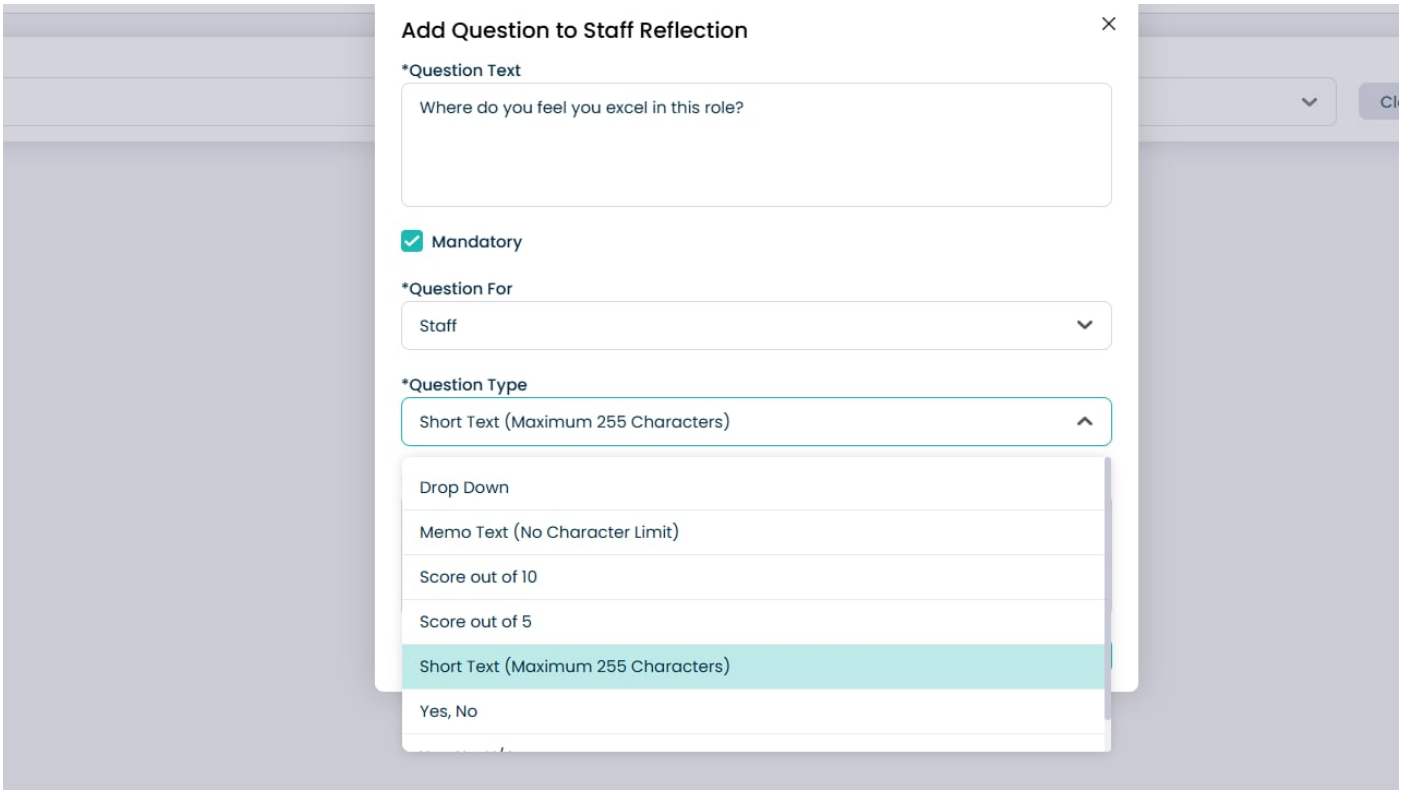
For this question, select Staff



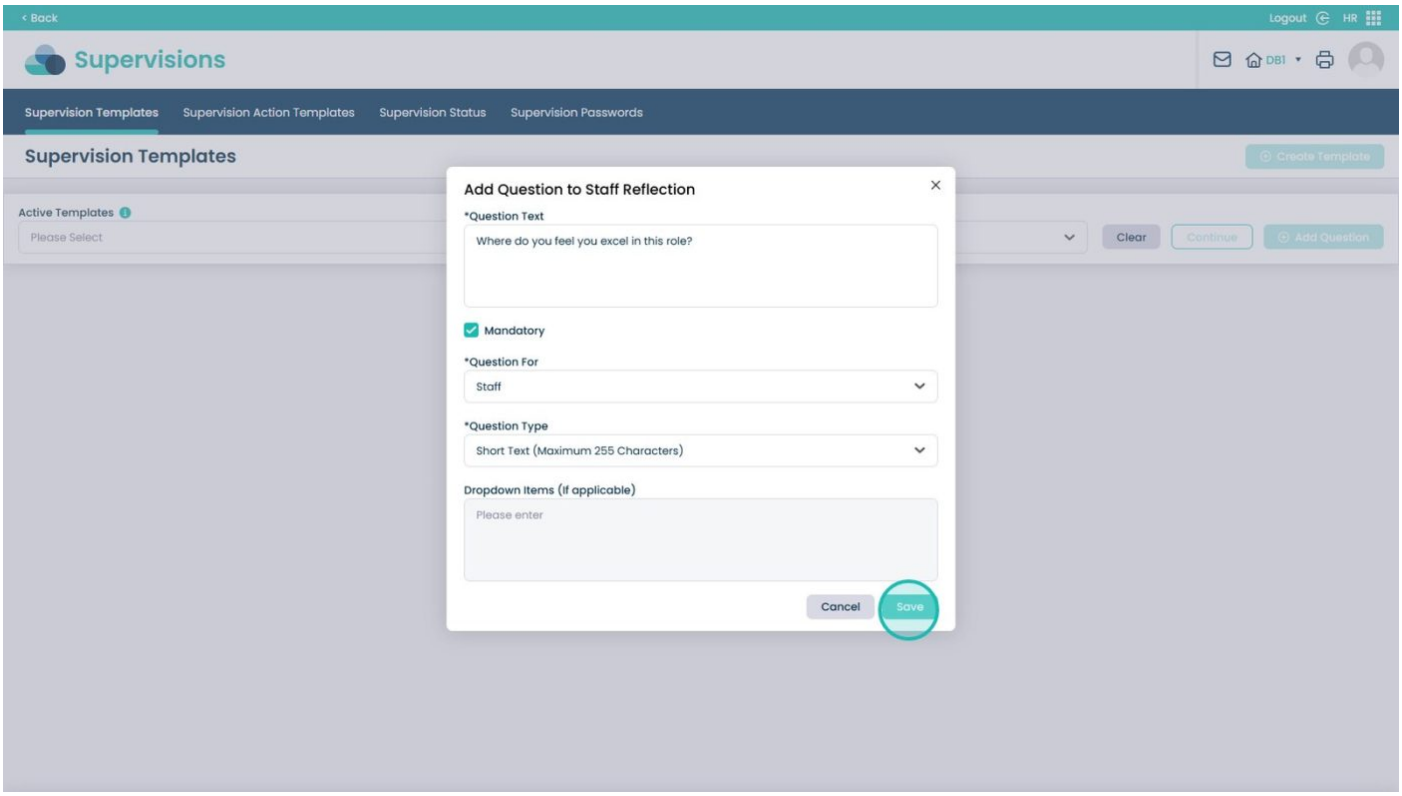
Choose the question type from this drop-down



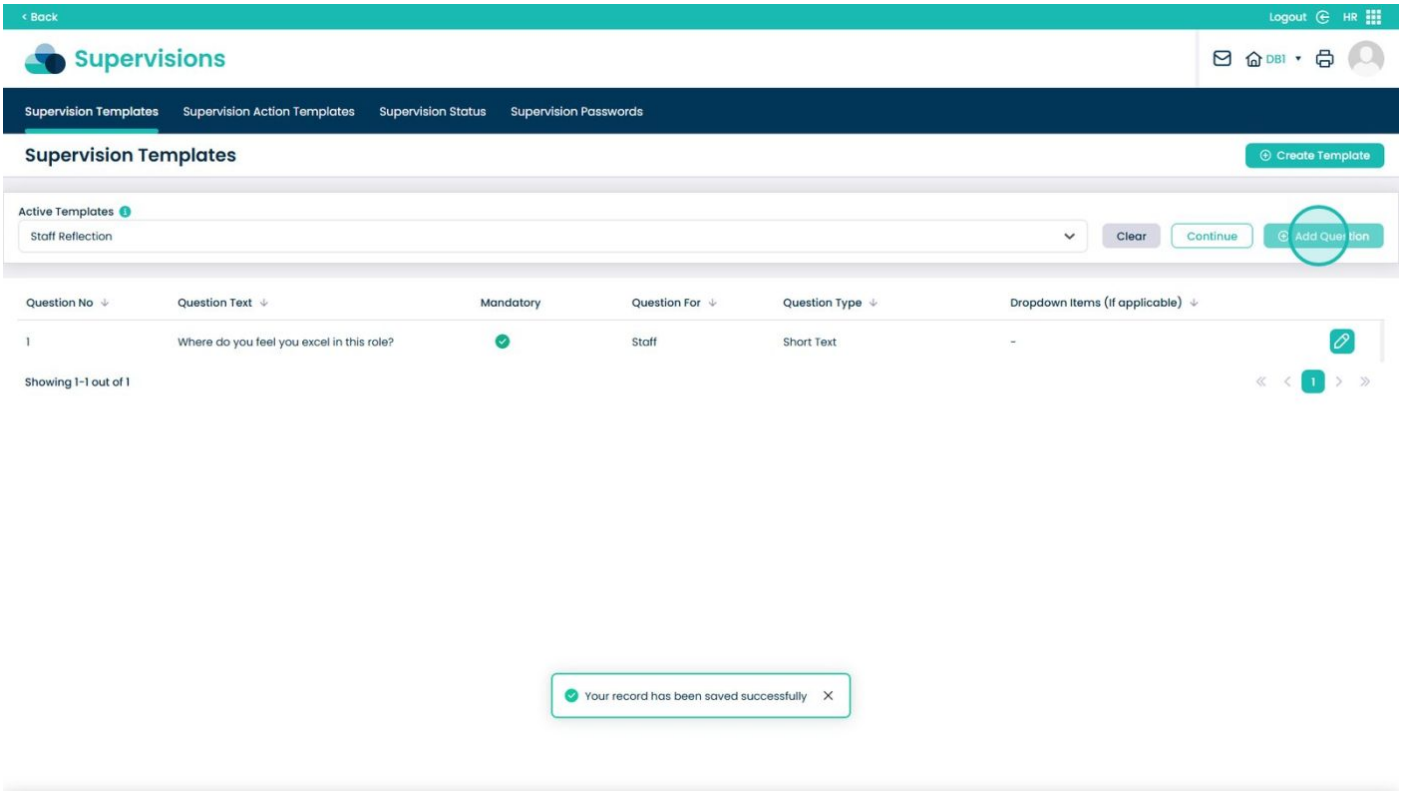
Select a text option (e.g., Short Text allows up to 255 characters)



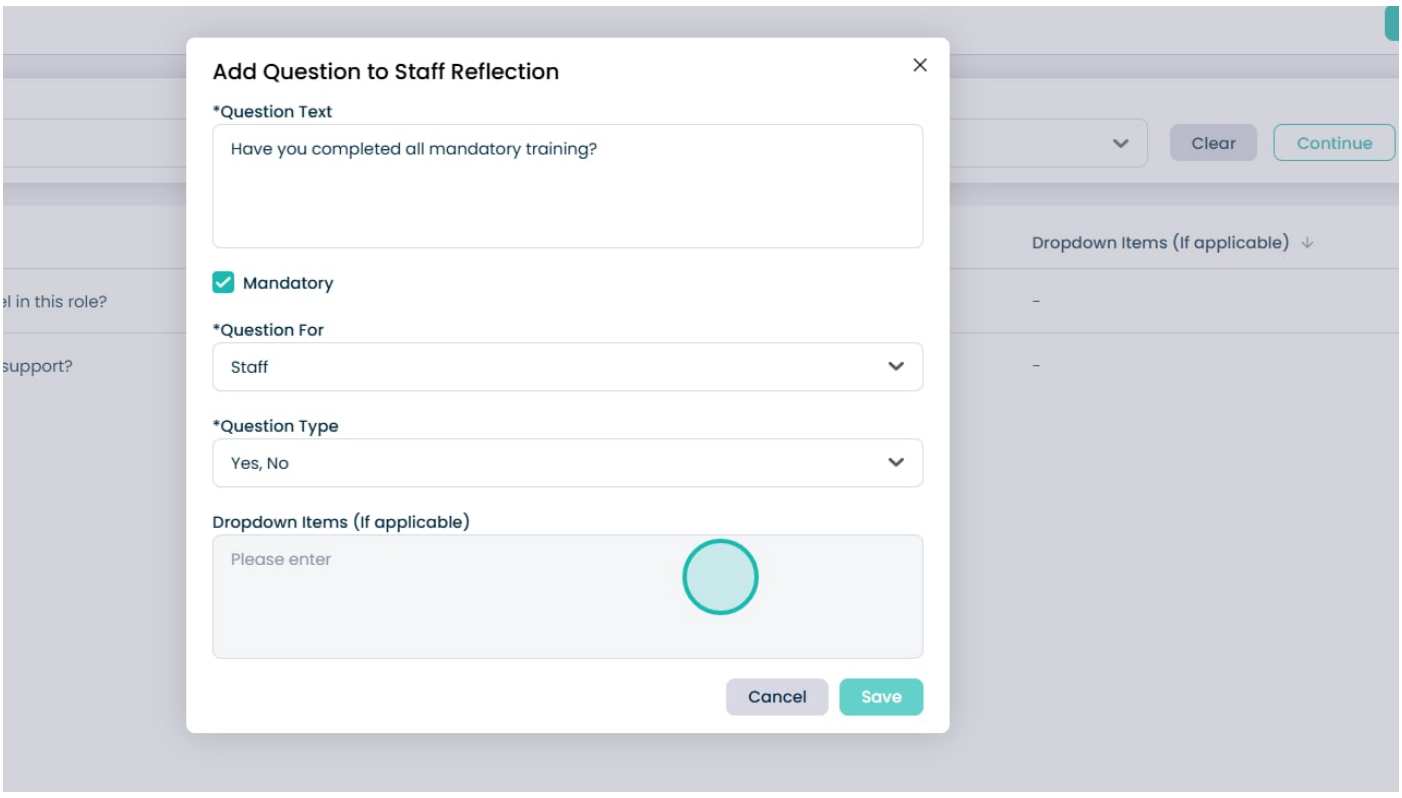
Click Save when you are happy with the question



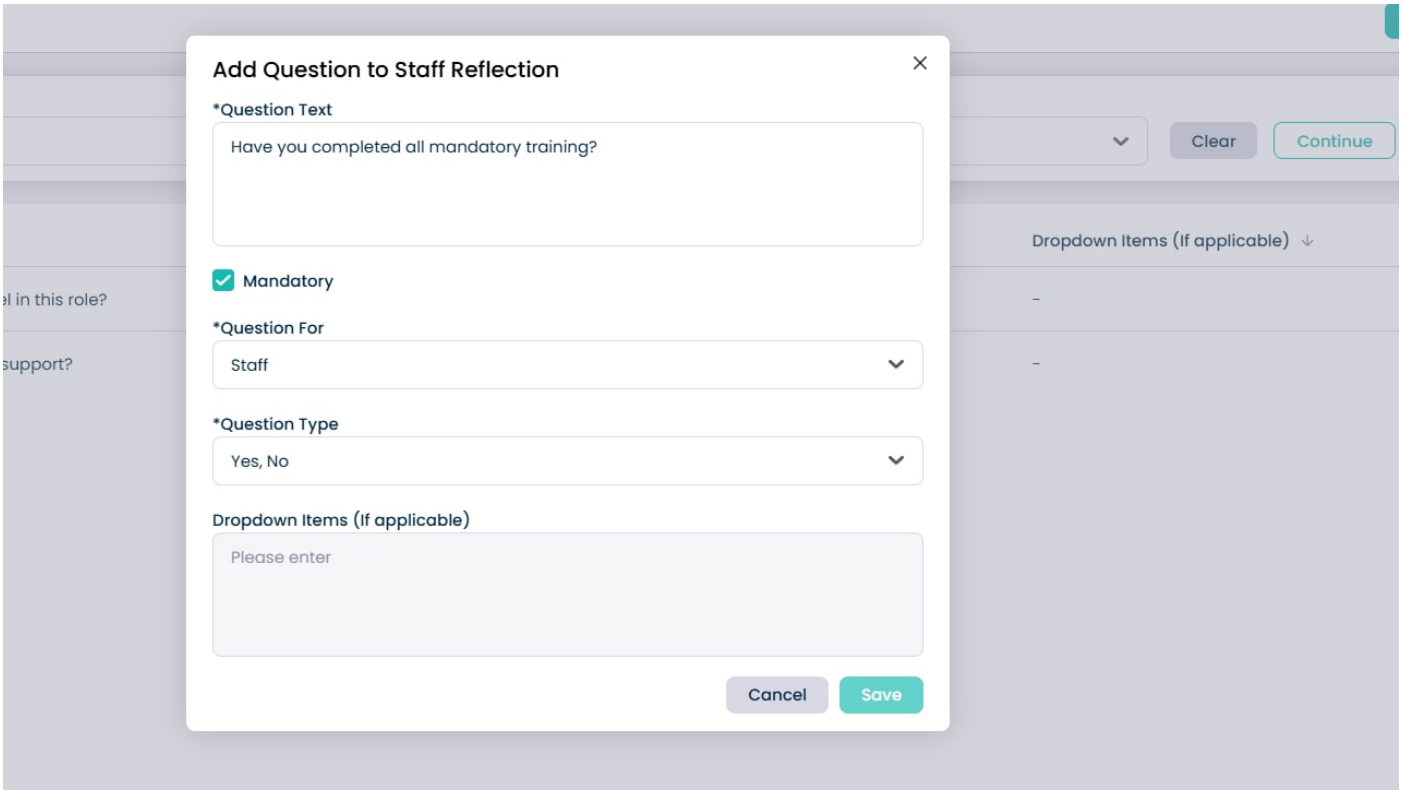
Add further questions by clicking Add Question



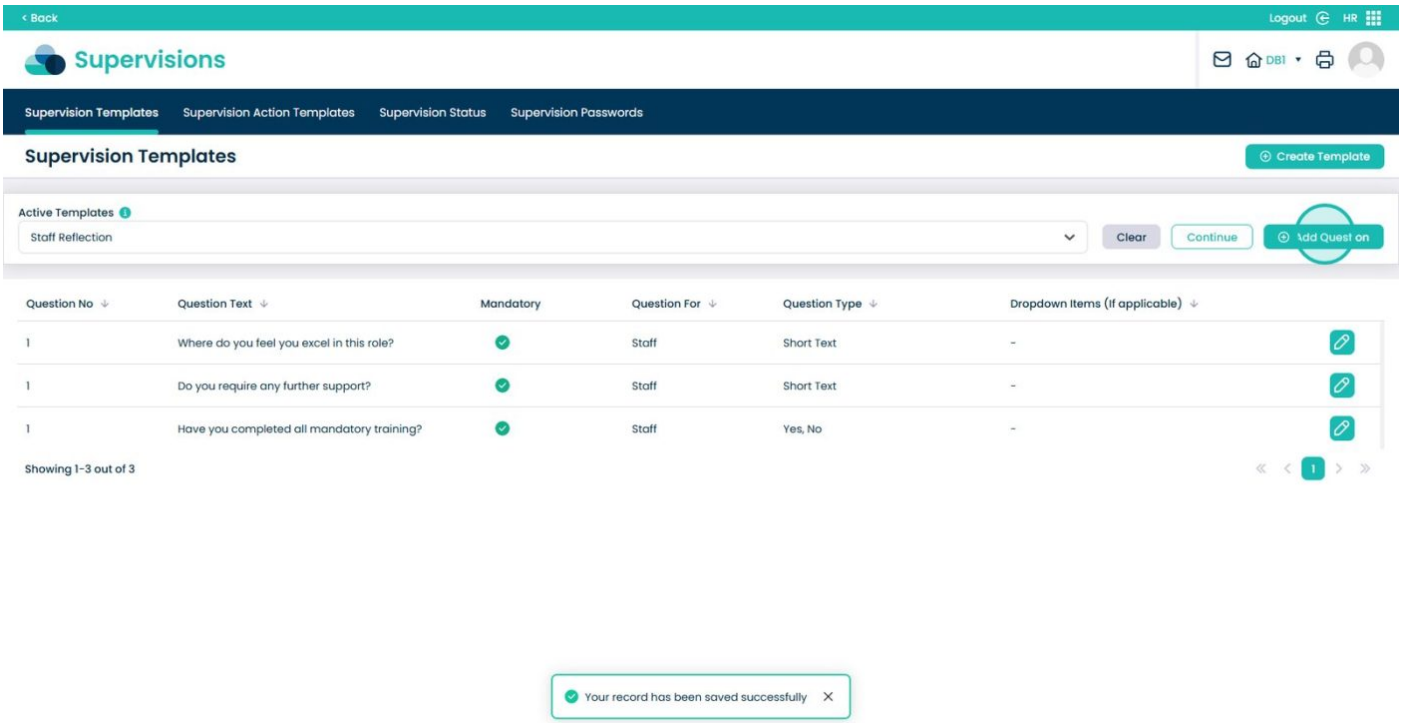
Create a Yes/No question (staff can select only Yes or No)



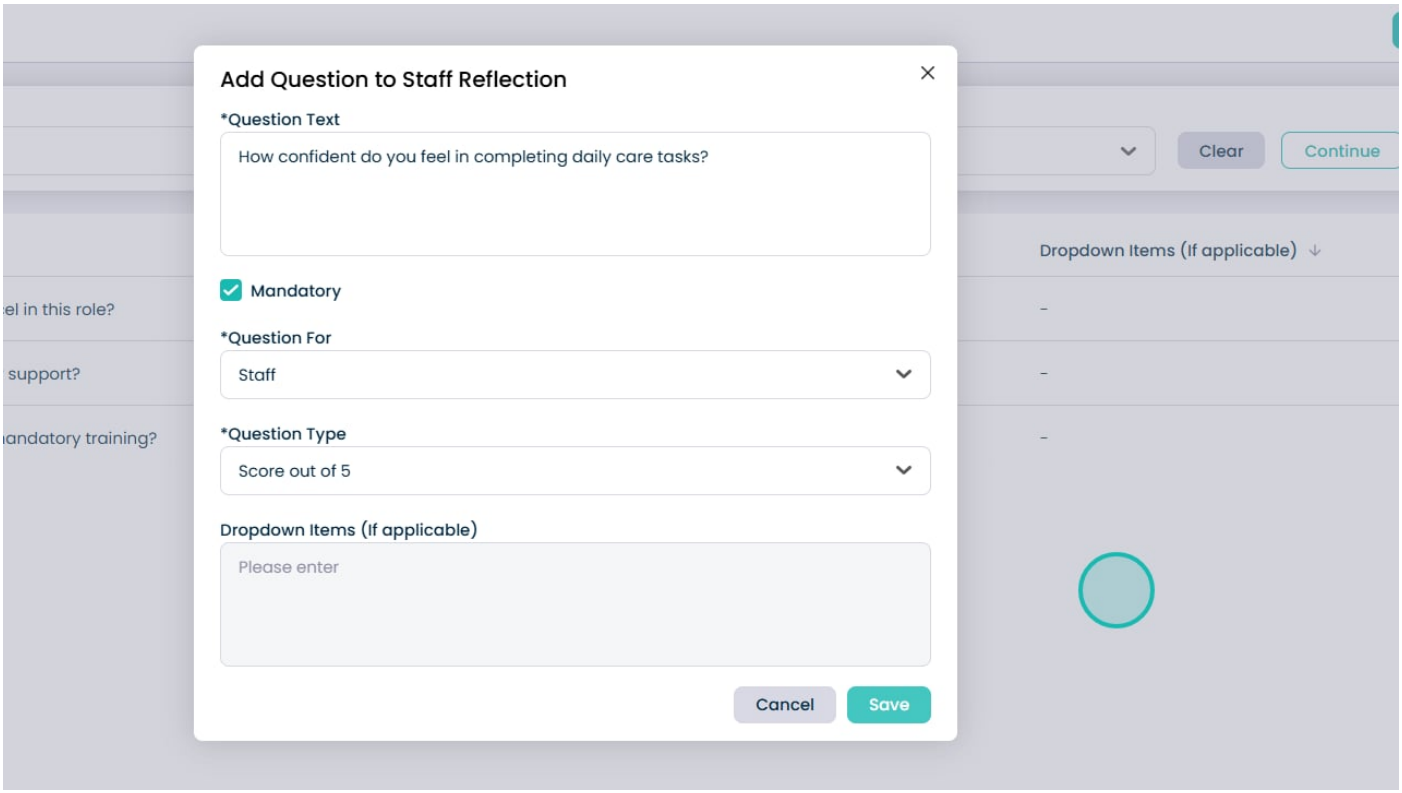
Click Save to add the new question



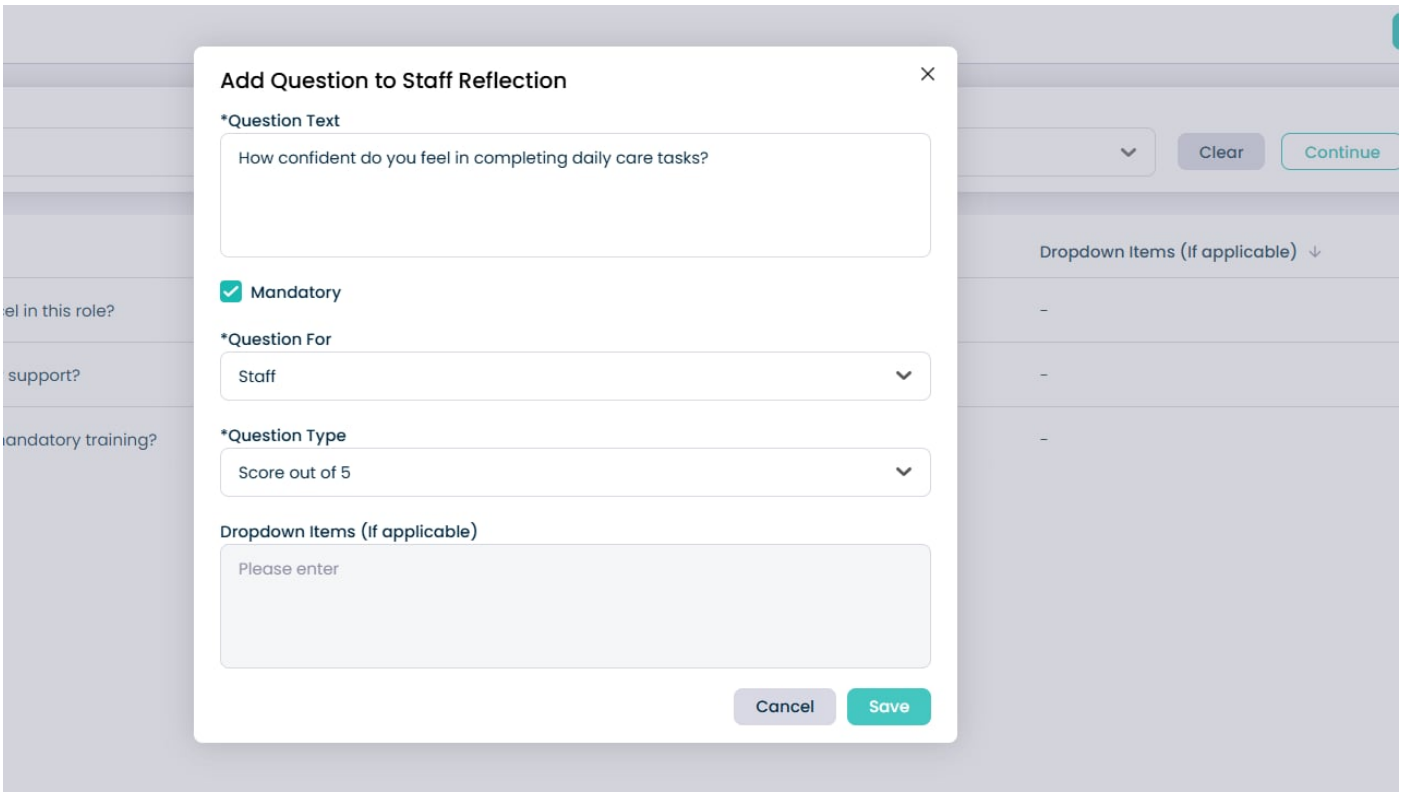
Add another question to flesh out the supervision



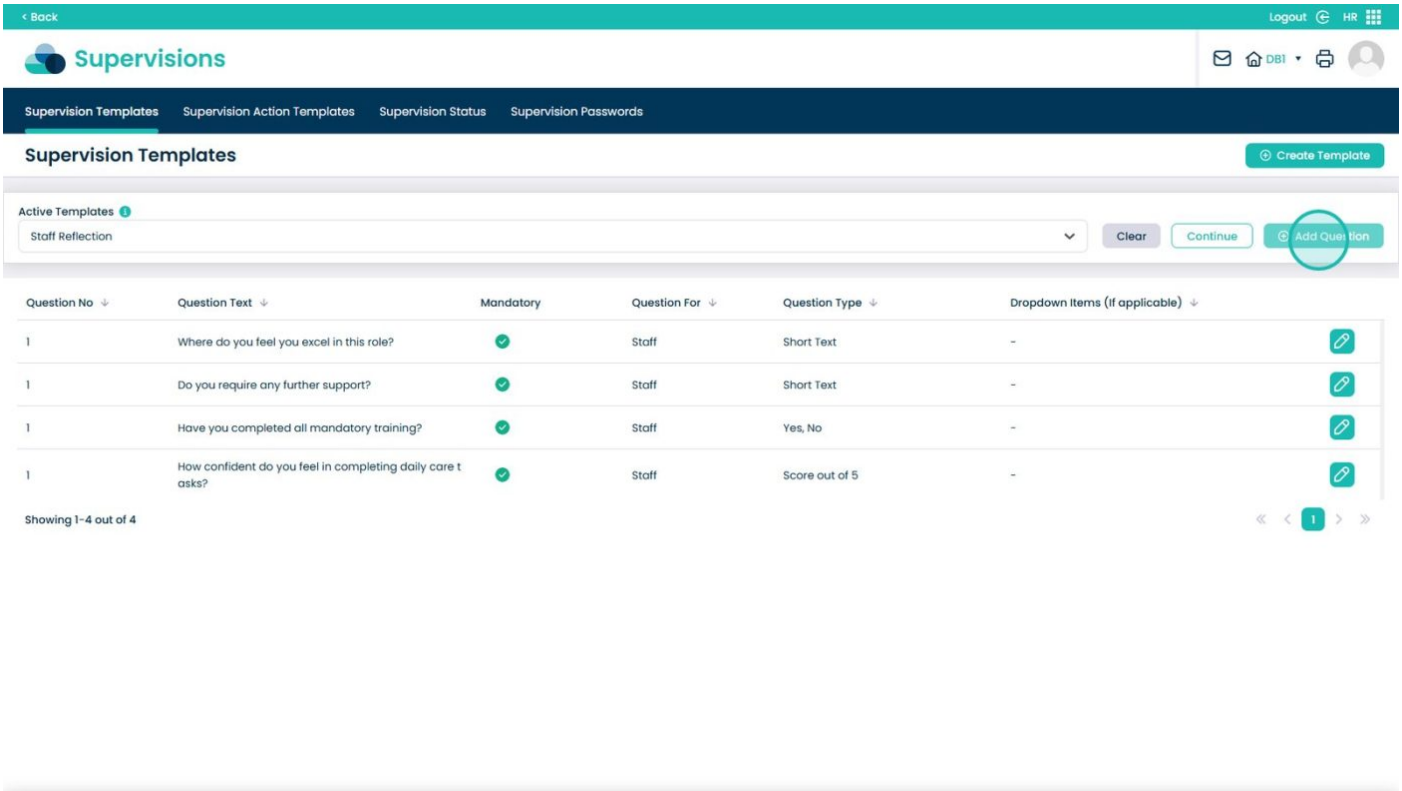
Create a score-out-of-5 question (or out of 10) for scale responses



Click Save when finished with the question



Add a drop-down selection question



Choose “Drop Down” from the list

Enter all selectable answers in this box — separate each answer with a comma

Click Save when finished

Create a supervisor-only question (only the supervisor can complete it)

In the “Question For” section, open the drop-down

Choose “Supervisor” from the list

Select “Memo Text” for the question type (free text with no character limit)

Click Save when finished

Was it helpful ?

- Happy
- Normal
- Sad

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