How to Create a Supervision Action Template on Cloud

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

How to Create a Supervision Action Template on Cloud



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The Supervision Action Templates feature in the Care Control HR App lets you easily create and manage custom templates for structuring staff and supervisor actions. These templates provide a consistent framework for capturing key information during supervision meetings and help ensure that all assigned actions are clear, measurable, and tracked.

This guide takes you step-by-step through setting up a supervision action template—from opening the app, selecting categories, naming your template, and assigning responsibilities, to adding descriptions, setting deadlines, and attaching documents. Designed for supervisors, managers, and staff alike, the templates support efficient, standardised action management that improves communication, accountability, and compliance across your organisation. Plus, templates can be reused and updated anytime to match your evolving supervision needs, making the whole process straightforward and effective for everyone involved.

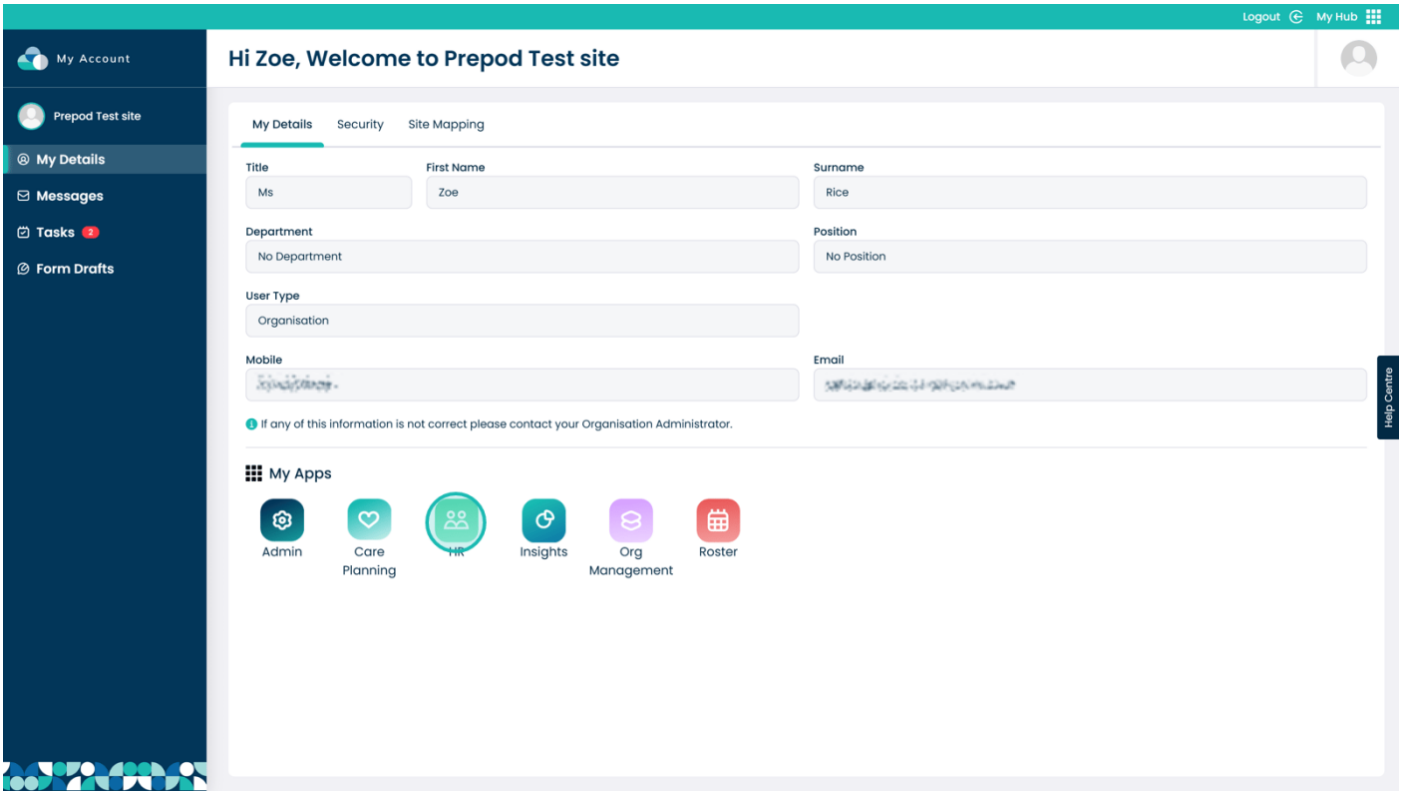
Interactive Guide

Embedded media:

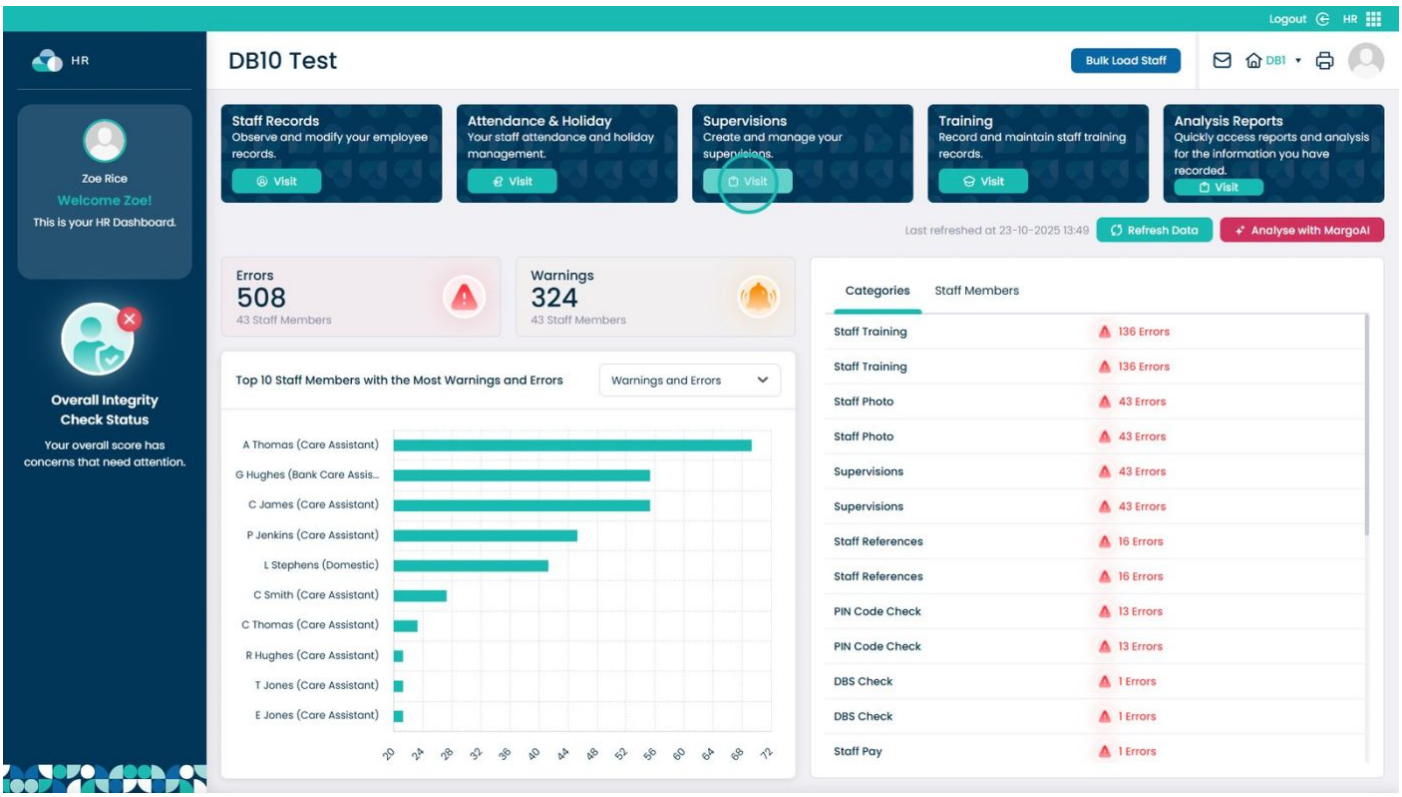
https://demo.arcade.software/BcSAm5XTnyZsnuHqokNI?embed&embed_mobile=tab&embed_desktop=inline&show_copy_li

Text based guide

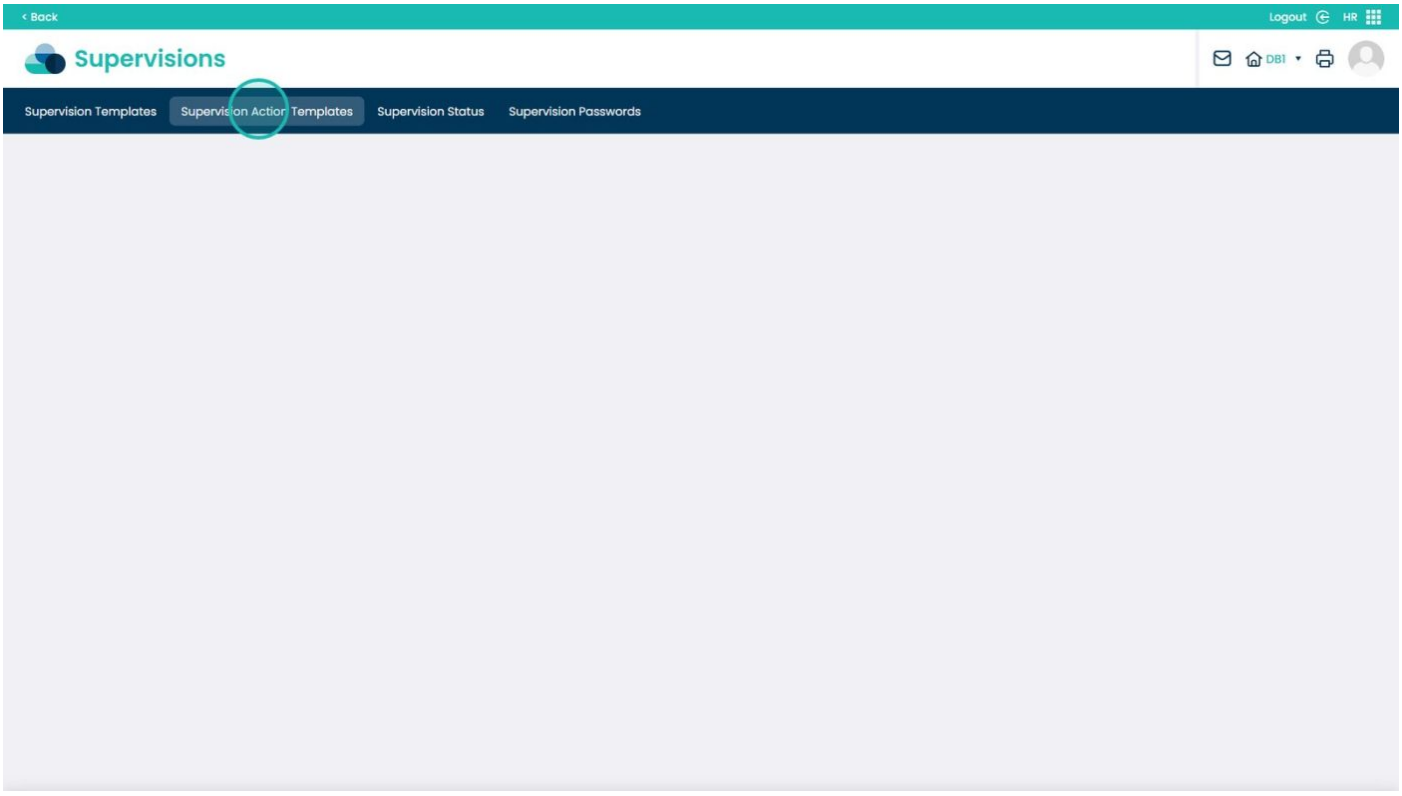
Open the HR App



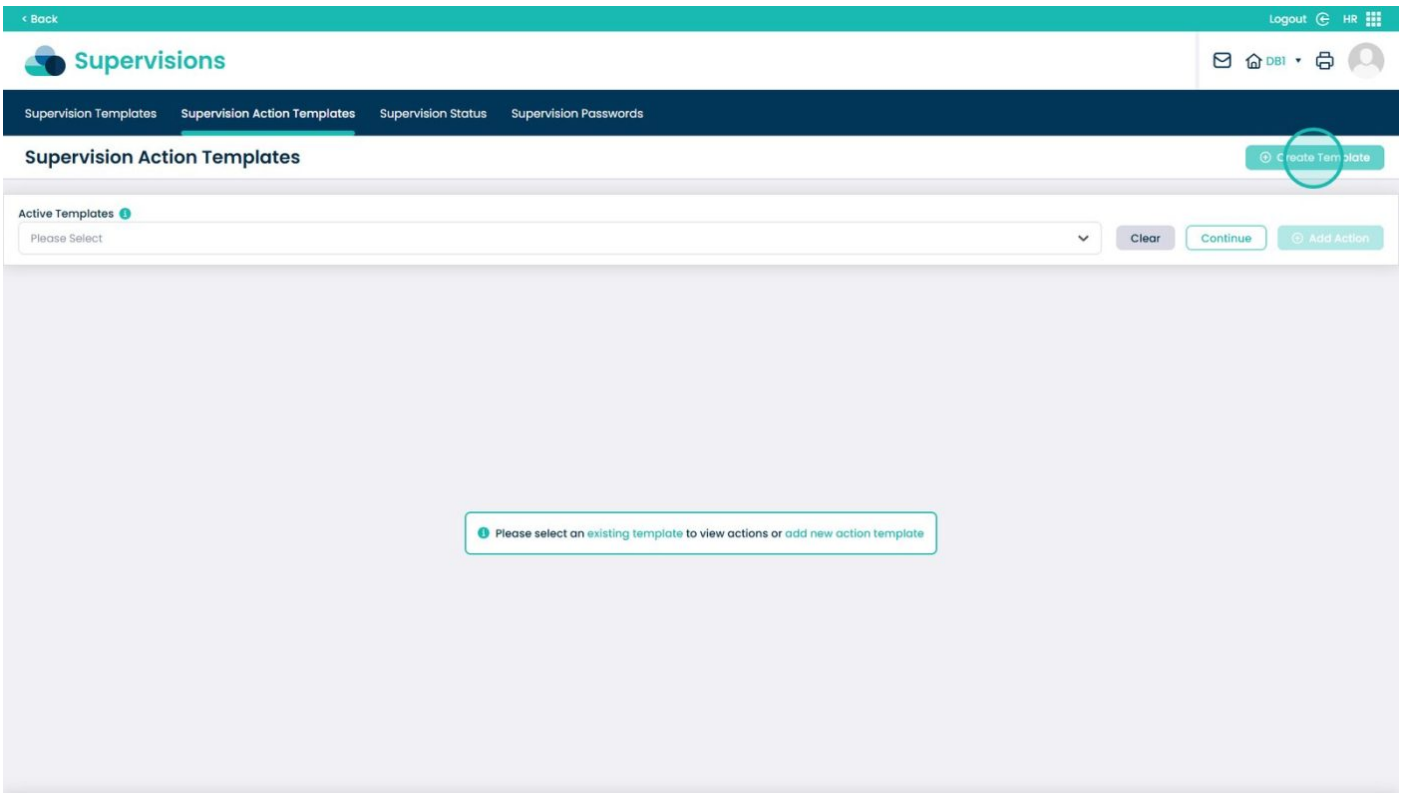
Select Visit under Supervisions



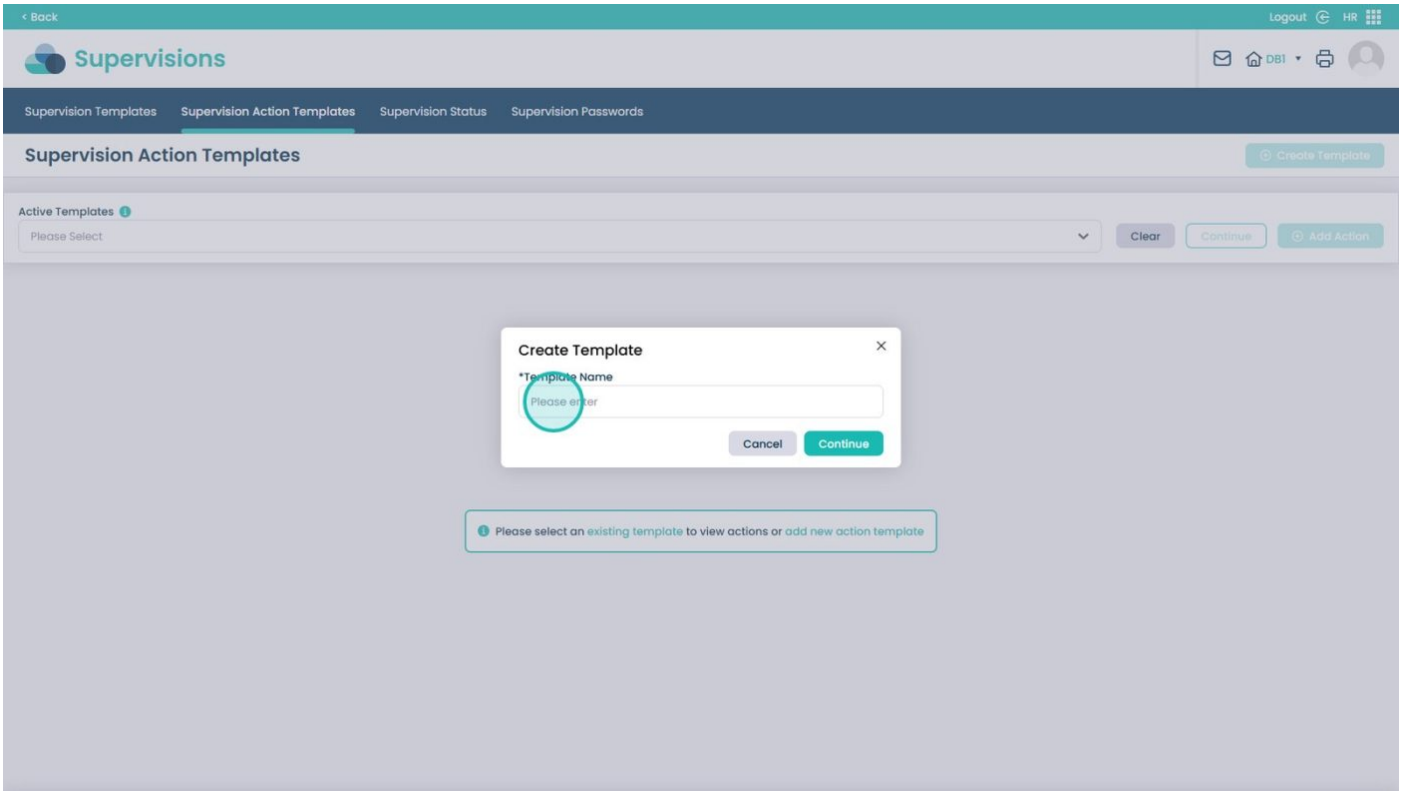
Pick Supervision Action Templates from the menu bar



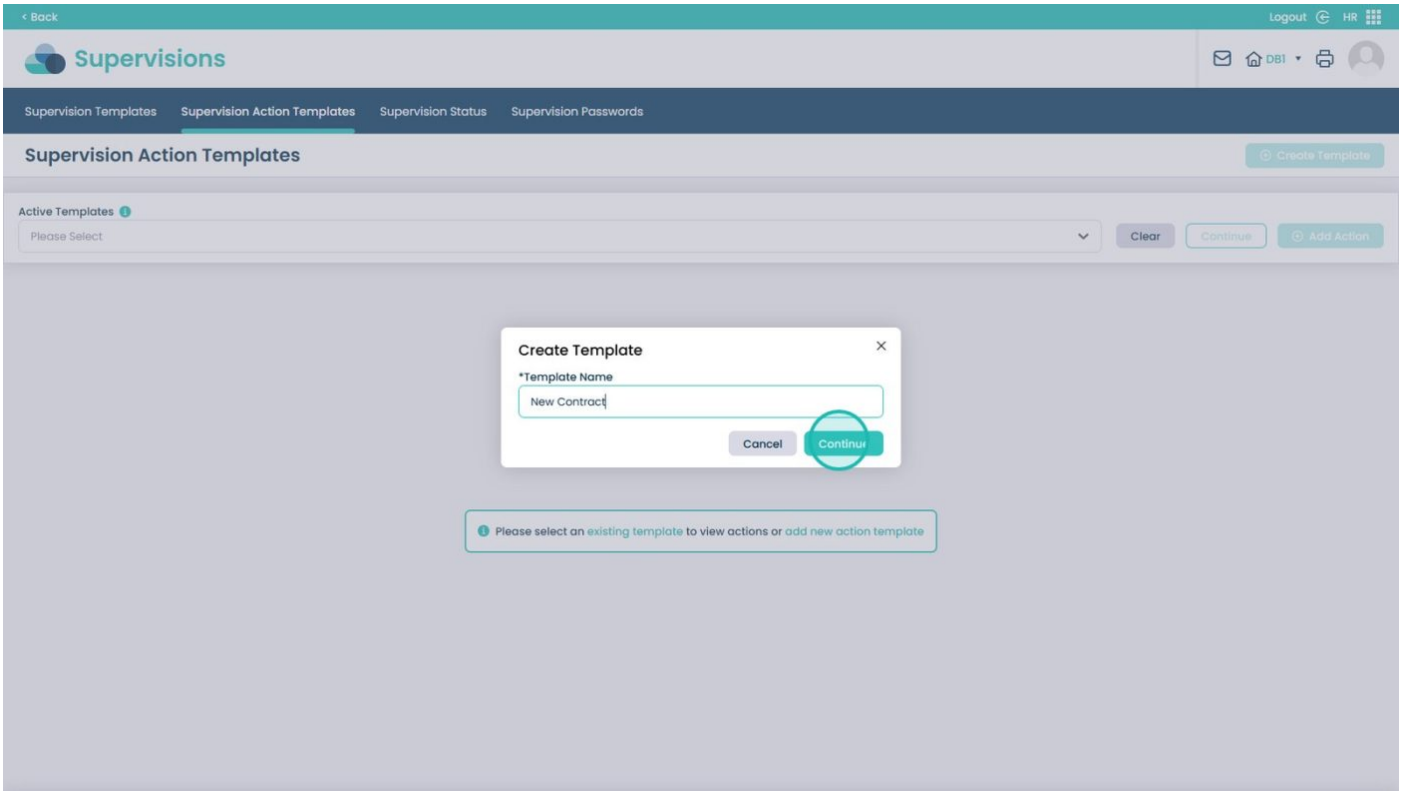
Click Create Template



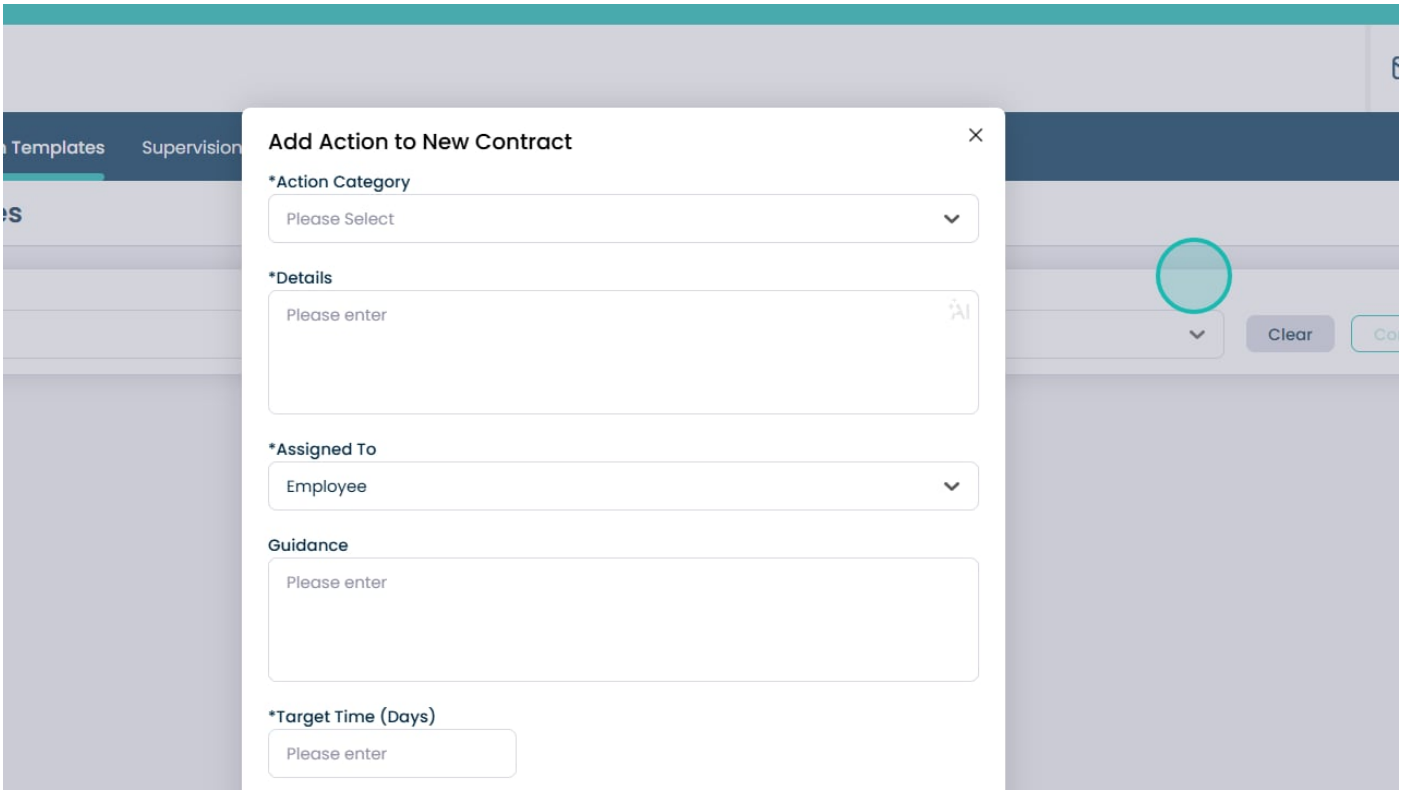
Enter the name of your template in the text box



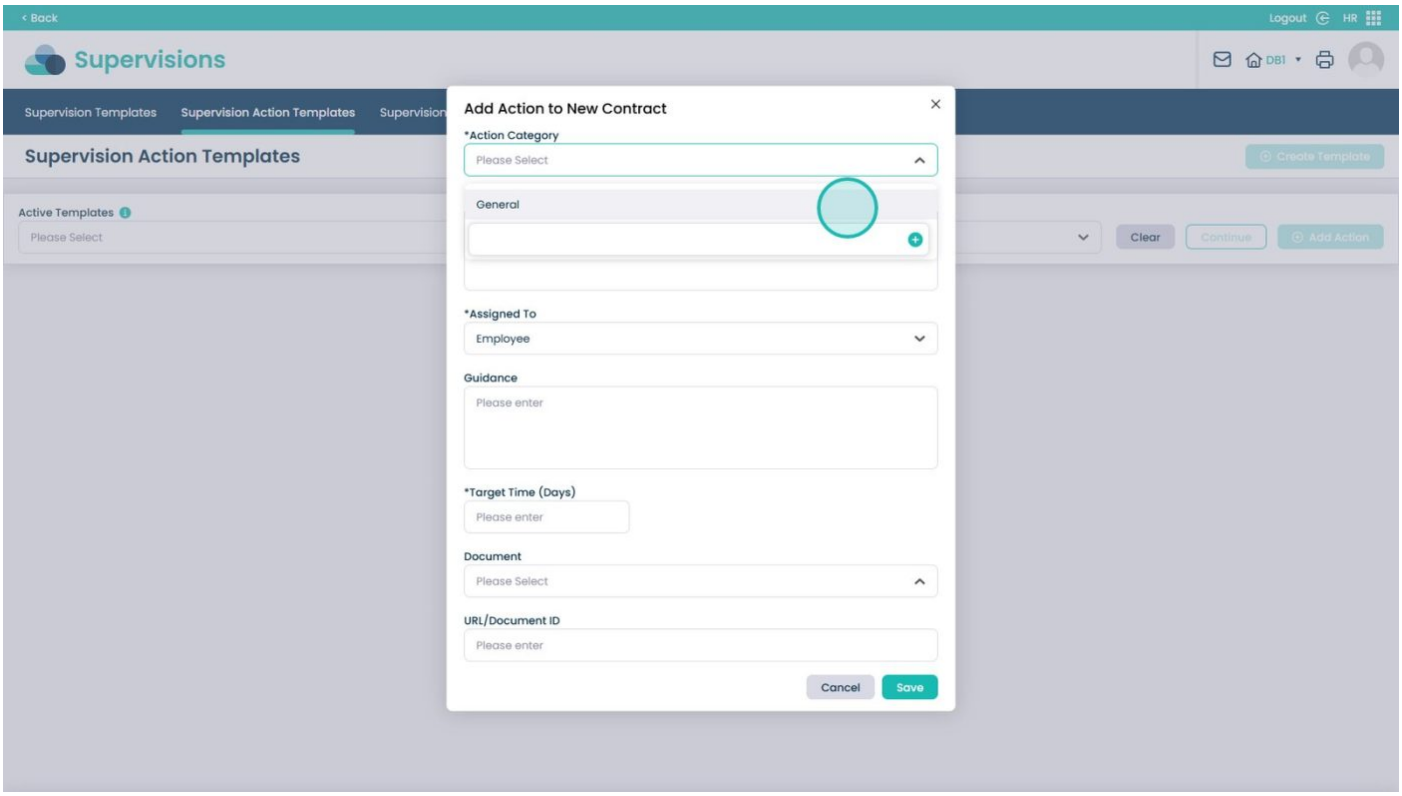
Click Continue



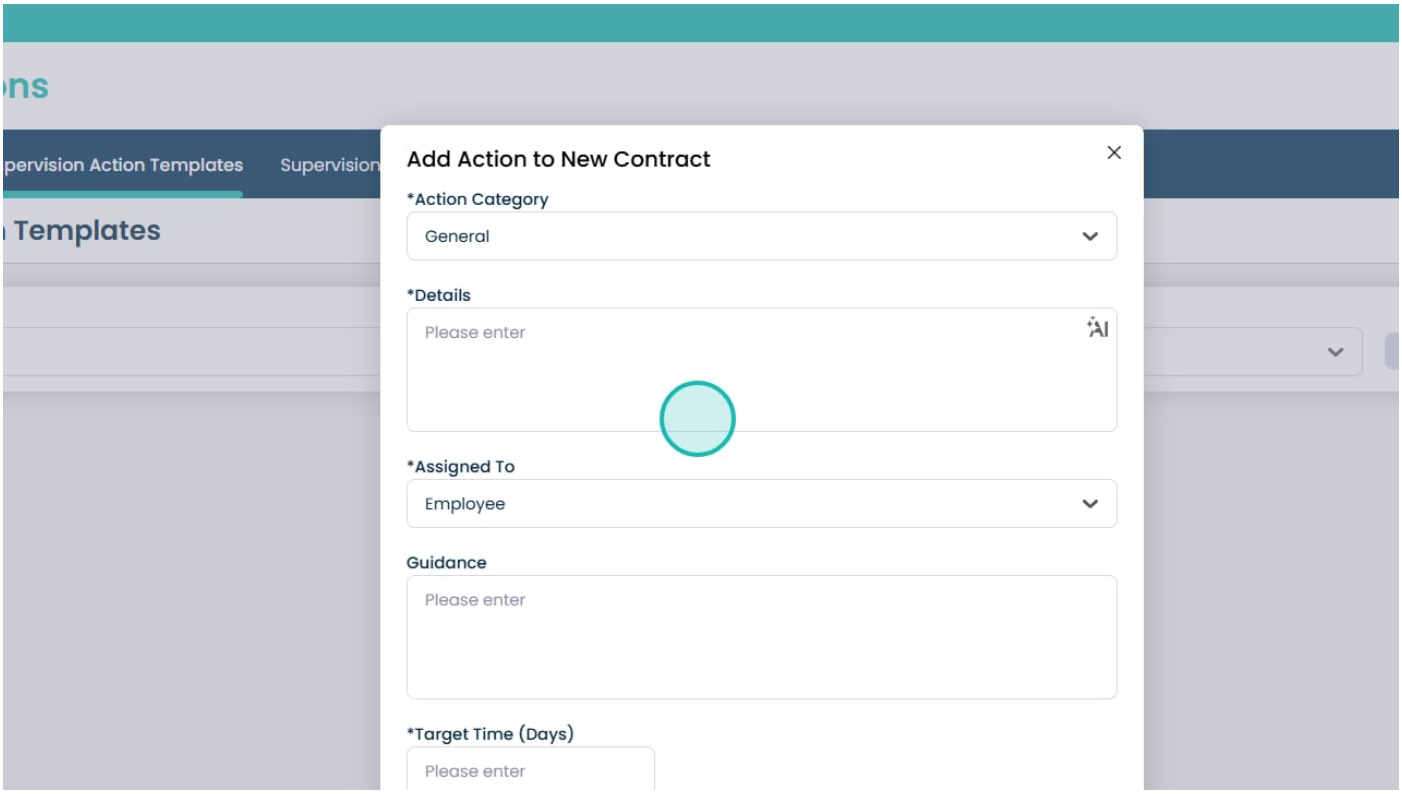
Open the drop-down to pick the Action Category



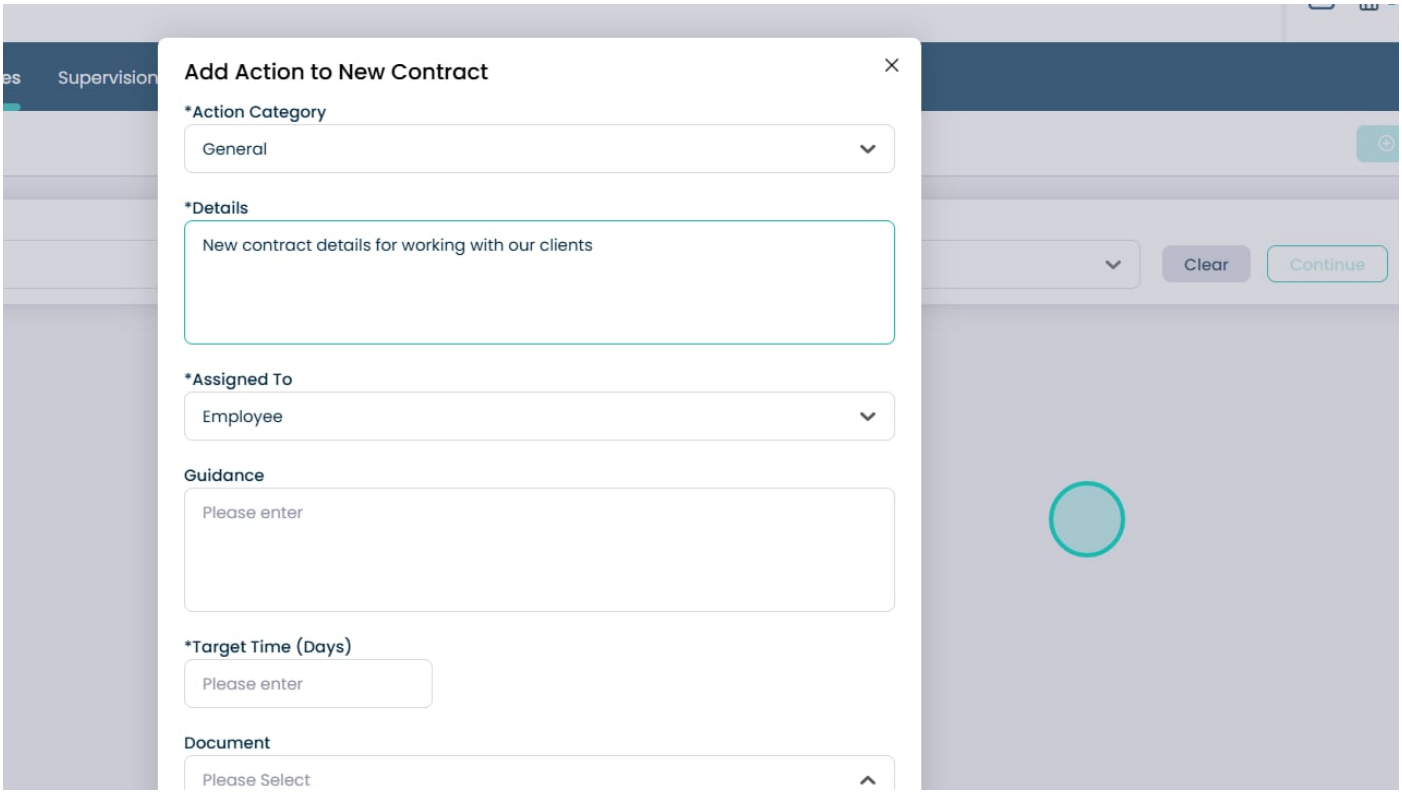
Pick the action category from this list, or add a new one by entering text in the text box and clicking the plus icon



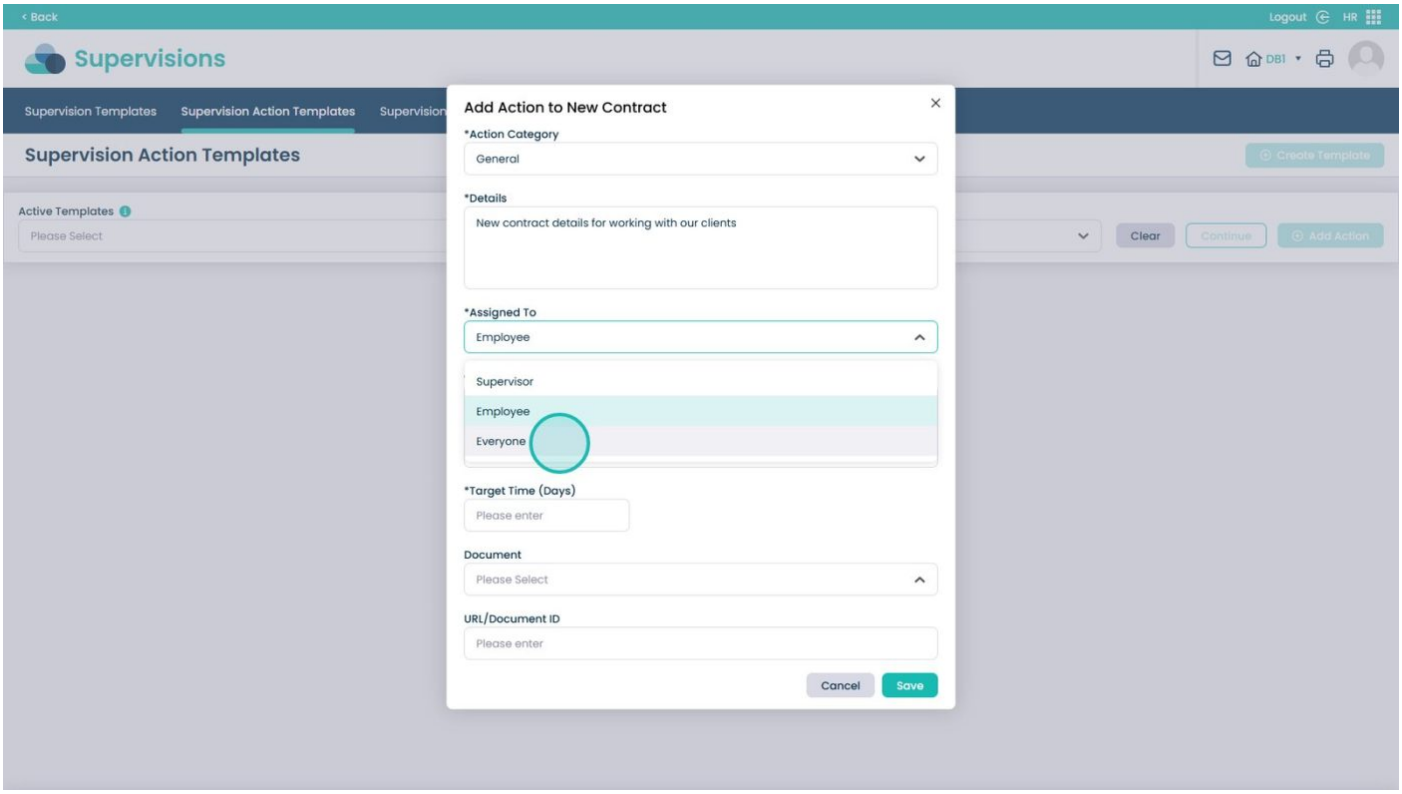
Enter the details of the action in this box, this is required



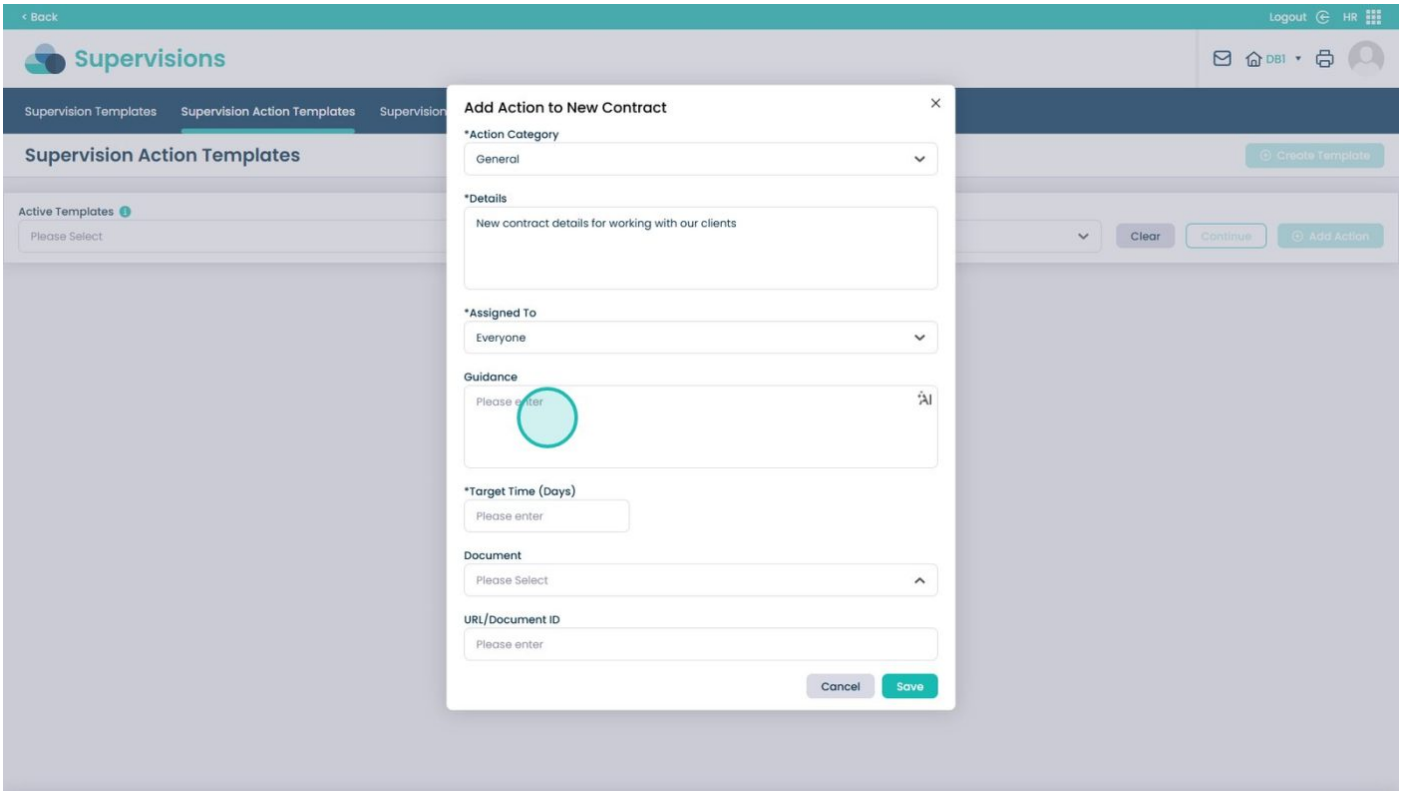
Open the Assigned To drop-down to pick who the action will be assigned to



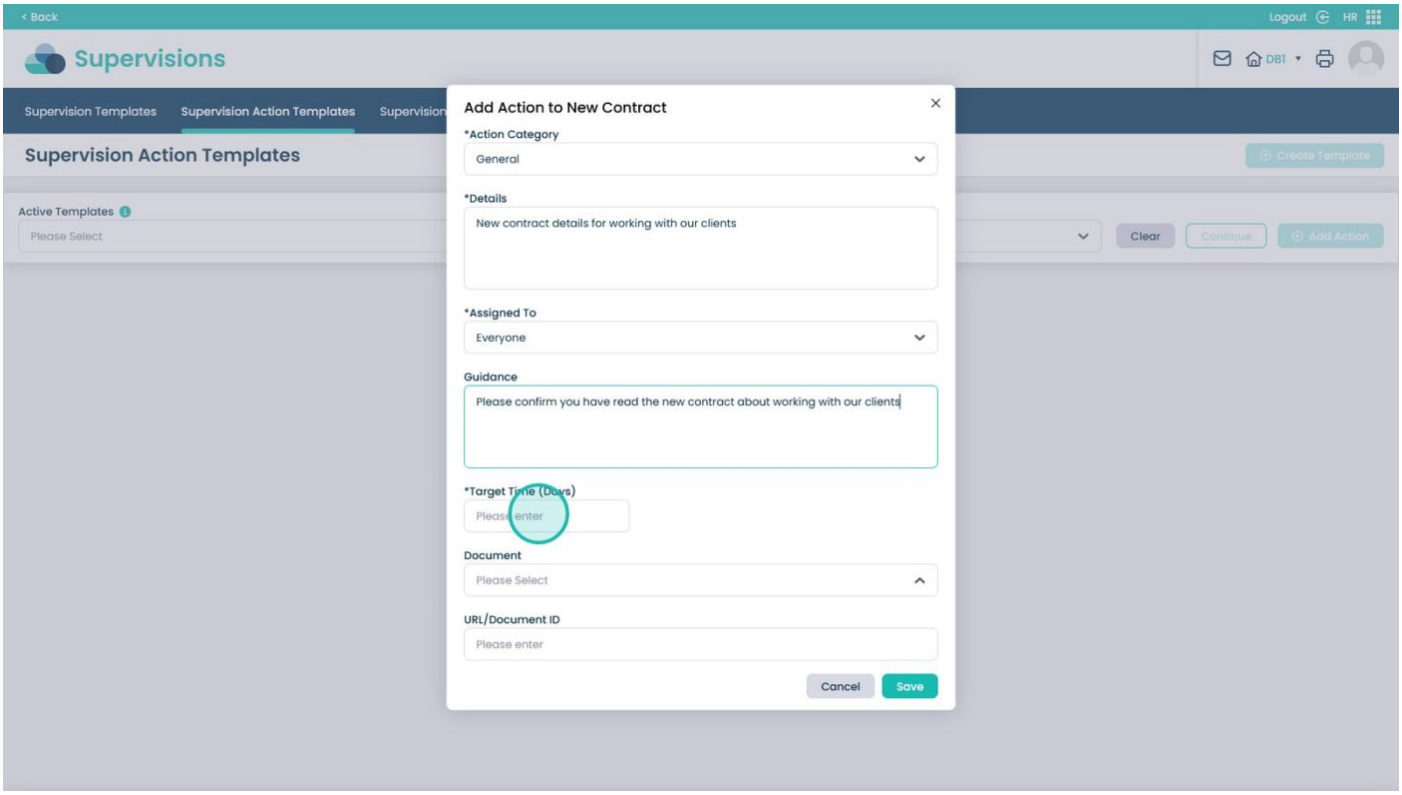
You can pick Supervisors, Employees or Everyone



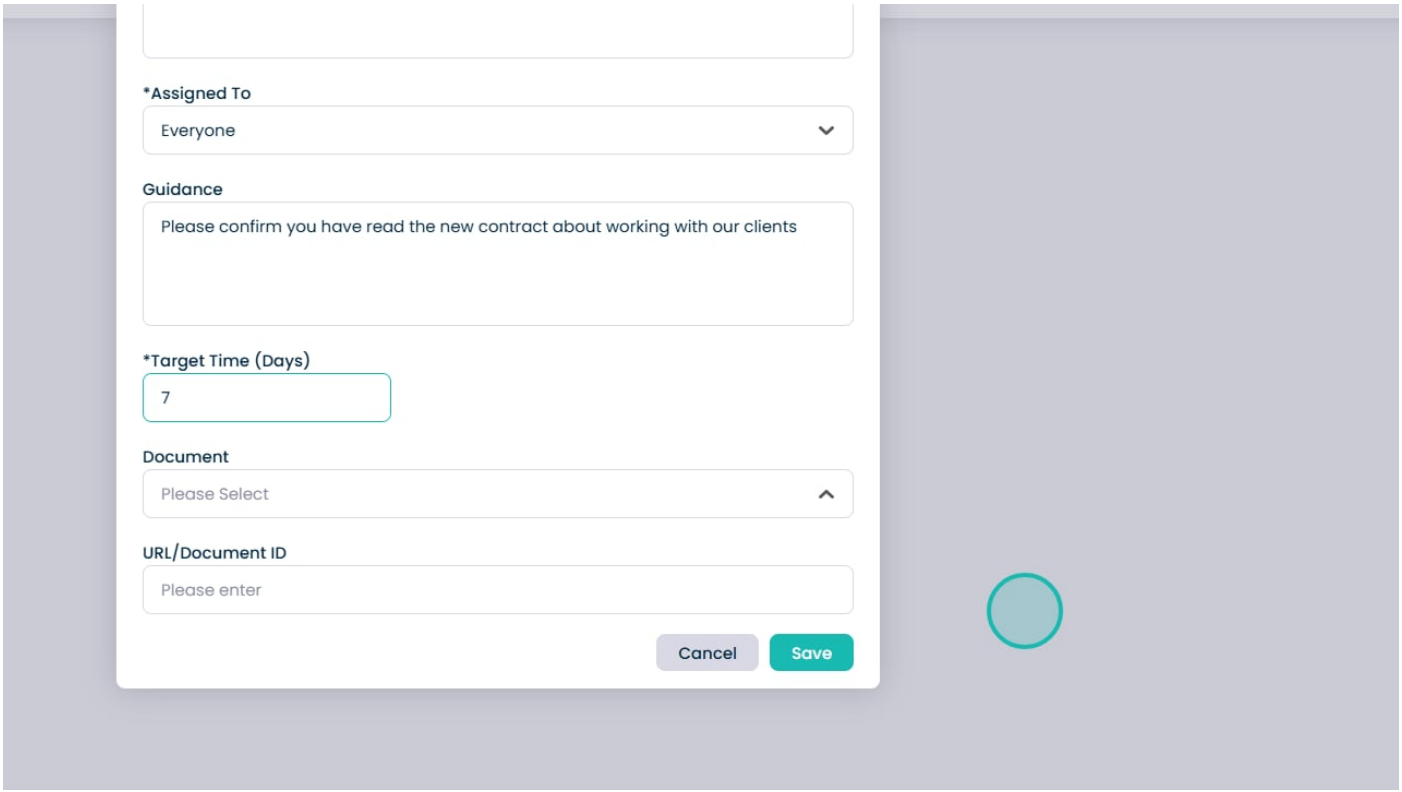
Enter further guidance if required in this text box



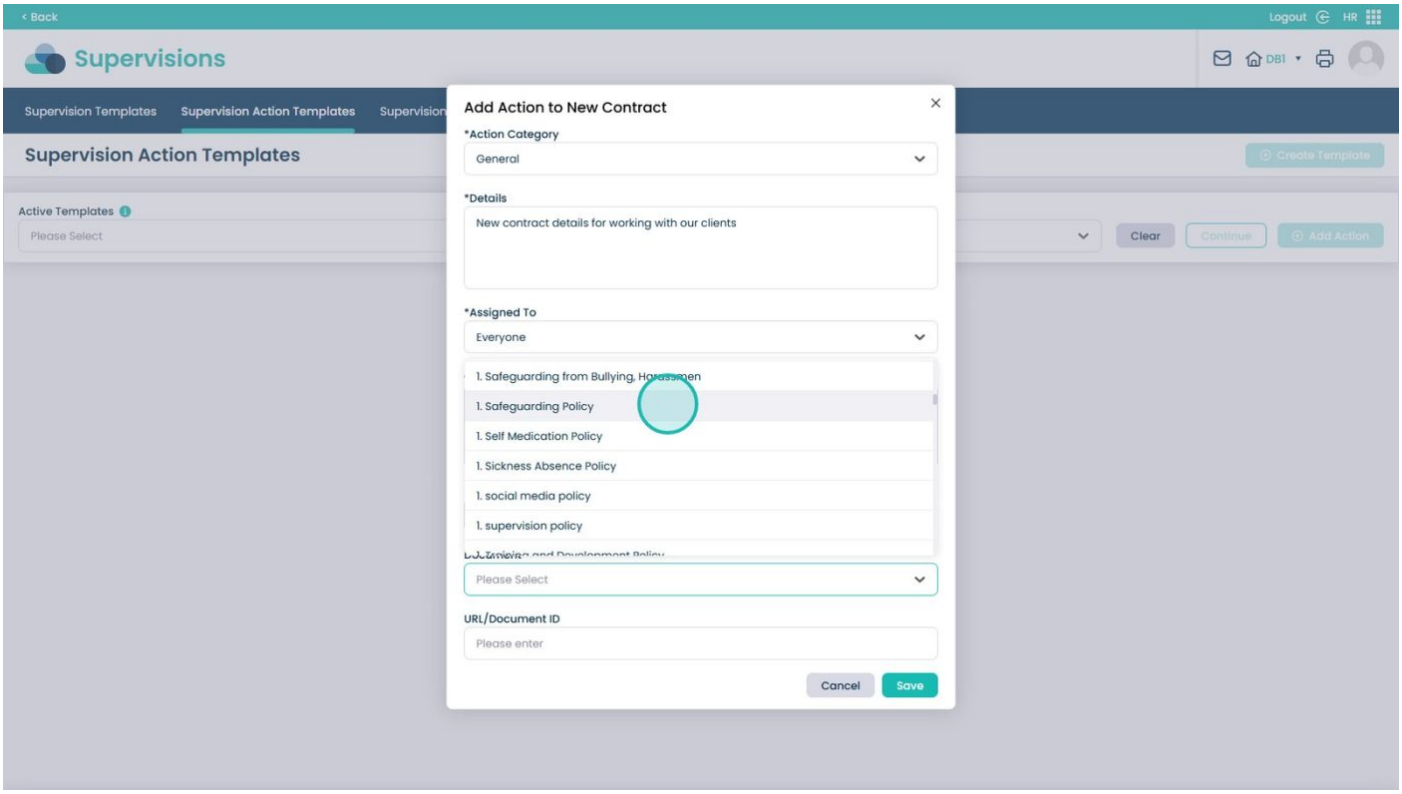
Choose the Target Time for the action to be completed by. This is in Days



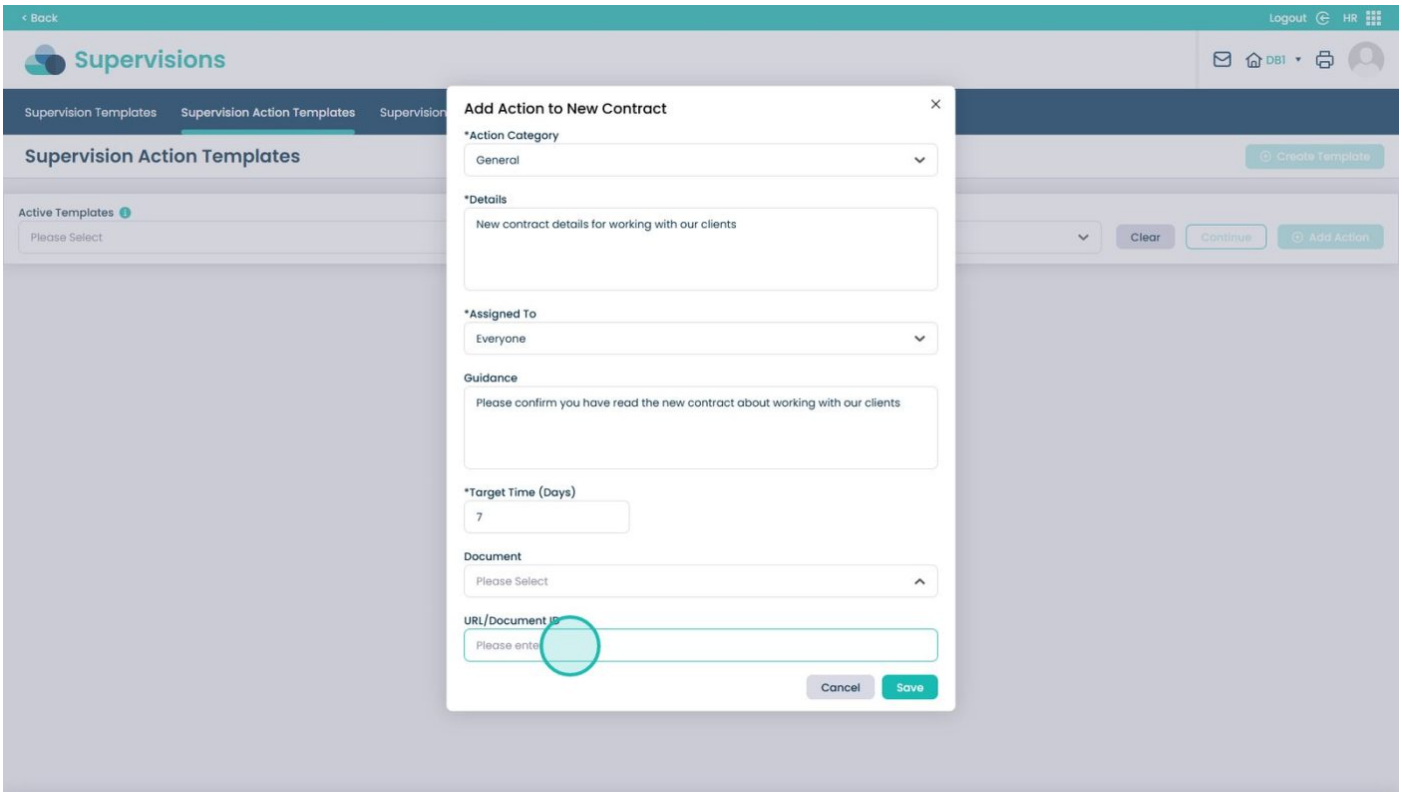
You can also attach a document to the action. Open the drop-down



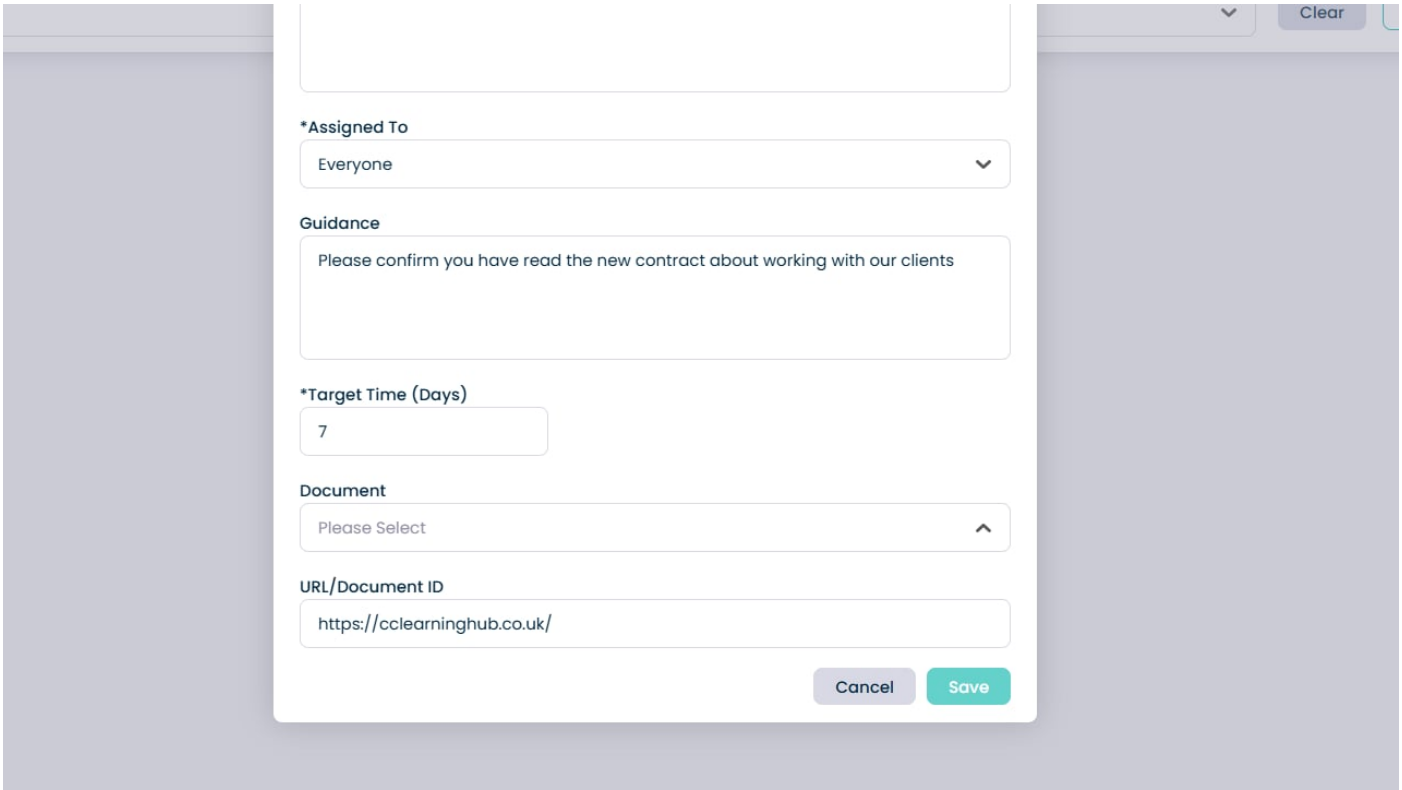
Choose the document from the list



You can also add a custom URL. You can only add a document or a URL, not both



When finished, click Save



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- Happy
- Normal
- Sad

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