CAREMONKEY ADMINISTRATORS GUIDE

Contents

OVERVIEW

- **Purpose** – CareMonkey is the electronic system used by Scouts Victoria for enabling parents/carers/individuals to share member health records, permission forms and contact details and will replace over time the old Personal Information Record (PIR) paper forms. It is also increasingly being used by Groups for internal communication with members, particularly for events and activities.

- **About CareMonkey** – CareMonkey is an Australian company headquartered in Melbourne. The system is widely used throughout Australia with a customer base including hundreds of schools, sporting clubs, community groups and businesses. It is also expanding its operations into the UK and USA.

- **Security and privacy** – all CareMonkey data for Scouts is stored in Australia. CareMonkey uses sophisticated security measures to protect data. Information about this, along with their Privacy Policy, is available on their website. CareMonkey is subject to the provisions of the Privacy Act and the Australian Privacy Principles.

SCOUTS VICTORIA AND CAREMONKEY

- **Organisational structure** – the organisational structure of Scouts Victoria is reflected in CareMonkey (ie. with a vertical hierarchy consisting of Branch, Regions, Districts, Groups and Sections). At this stage CareMonkey has not been configured to reflect internal groupings that cut across the organisation such as adventurous activity teams or District/Region Sectional groupings such as District Cubs etc. However, CareMonkey can be tailored to manage any large events.

- **Data integration** – CareMonkey and Extranet sync each night at which time CareMonkey is updated with any key changes from Extranet. New or ceasing members in Extranet will have their profile requests created or archived in CareMonkey accordingly. CareMonkey will also update with any changes to a member's formation such as movement between Sections (eg. Joeys to Cubs), movement between Groups or the addition of any new secondary roles. Once a profile request has been created in CareMonkey then any subsequent changes to that person's contact details in Extranet will **not** flow through to CareMonkey.

- **Core data** – new profile requests in CareMonkey can only be generated by the creation of a new member record in Extranet, they cannot be manually generated in CareMonkey. Similarly the membership of all core Sections in CareMonkey (such as Cub, Scout, Venturer, Adult etc) which are populated through the nightly integration and are marked with a symbol in their icon, cannot be changed manually.

- **Minimum data requirements** – an active or pending membership record in Extranet won't generate a profile request in CareMonkey unless the Parental Detail(s) section of the Extranet record contains a nominated primary contact and email address (for a youth member) or the record contains a member email address (for adult members).

- <u>Levels of user</u> – there are 3 levels of user in CareMonkey:

  ➢ The **Administrator** for each Region, District and Group. This is the Leader-in-Charge (LIC) for that formation and this role has the ability to create <u>sub-groups</u> and <u>Carers</u>, enable (approve) <u>eForms</u> and change <u>organisational settings</u> for the formation.

  ➢ A **Group Carer**. This level is able to view the profiles of all members within a section, formation or eForm for which they have been given Carer access and can create but not enable an eForm. For instance, an Administrator could add a Cub Leader as a Carer for the Group's Cub Pack thus allowing the Cub Leader to view the care profiles of all Cubs in that Pack.

  ➢ A **profile owner**. This is the person who creates and owns a CareMonkey profile. In the case of a youth member the profile owner would normally be their parent or guardian. In the case of an adult member the profile owner would be that adult member.

PROFILES

- <u>Account versus profile</u> – each CareMonkey profile owner is required to create a CareMonkey account. Under this account are stored any profiles they own, such as their own profile and the profiles of their children. CareMonkey strongly recommends that each adult creates their own unique account and that adult members do not share an account. In the case of separated families a profile owner can elect to share a child's profile between two accounts with each account having either "view" only or "view and modify" access to the profile.

- <u>Latest information</u> – CareMonkey records are maintained and updated by the profile owners, so profiles should contain up-to-date health records and contact details. Profile owners are periodically reminded by CareMonkey to update their profiles.

- <u>Meaning of profile colours</u> – when an Administrator views the profiles in their formation they will see them as either blue, red/pink, green or yellow. These colours have the following meanings:

  ➢ **Blue** means the profile has been successfully completed and shared with Scouts.

  ➢ **Pink/red** means the profile has not been completed and shared with Scouts. By clicking on the menu symbol (the three little horizontal lines) of a profile an Administrator will be taken to the Profile Request screen where they can see the current completion status of a profile in the bottom left corner of the screen.

  ➢ **Green** means the profile request has an invalid email address. In this case the Administrator needs to ascertain the correct email address for the profile

owner then click on the [menu symbol](#) for the profile, then click on "Edit profile request" and enter the correct email address into the "Override email" field then click "Save".

> ➢ **Yellow** means the profile is being managed locally because the member refuses to use CareMonkey. No emails will be sent and no health information collected. This can be set or unset by clicking "Edit profile request" for the profile then ticking or unticking the "Manage this profile locally" box.

- [Profile completion requests](#) – after a new member is created in Extranet a CareMonkey profile request will be generated for them and will be emailed to the profile owner (as identified in the member's Extranet record) asking them to complete the member's profile and share it with Scouts. If this is not done within 5 days then CareMonkey will send periodic email reminders to the profile owner until the profile is completed and shared.

- [Profile sharing](#) – at all times a CareMonkey profile remains the property of the profile owner. The profile owner may specifically elect to share that profile with organisations such as Scouts or a school. When a profile is shared with Scouts we are only granted access to view it and are unable to change any aspect of the profile. A profile owner only completes one profile per member but can share this single profile with as many organisations as they wish. A profile will only be shared if the profile owner clicks the "Share" button that is specifically linked to a share request from the relevant Scouting formation. A share request will only appear in a profile if the profile has been fully completed and the name and email address in the profile exactly match the name and email address in the share request from Scouts Victoria. A profile owner should not try to manually share a profile with a formation or Leader other than by the process outlined above.

- [Accuracy of data](#) – because CareMonkey uses a name and email address to uniquely identify each person it is vital these are accurate. If a CareMonkey profile has been created for "Bill Smith" and Scouts is requesting a profile for "Billy Smith" or "William Smith" then CareMonkey will not link the profile request with the profile. Similarly the email address in the profile request must exactly match the email address used by the profile owner to login to the profile otherwise the profile cannot be shared.

- [Changes to a profile request](#) – prior to the completion of a profile by the profile owner, an Administrator may change the email address to which the profile request is being sent (through the [Override email](#) field as outlined above) or may archive/delete the profile request. If a profile request is archived or deleted and the member is still active in Extranet then a new profile request will be generated following the next nightly sync between CareMonkey and Extranet. If a profile request has been generated with an incorrect name then the member's name should be corrected in Extranet and the profile request should be deleted or archived. A new profile request with the correct name will then be generated in the next sync.

- Changes to a completed profile – once a profile has been completed then only the profile owner can change the details within that profile.

- Private notes – Administrators and Carers can record private notes about a profile that are not visible to the profile owner. This is done by clicking on the menu symbol for the profile and then selecting "Private notes".

- Viewing profiles – In addition to viewing profiles online on a computer, Administrators and Carers can also view profiles online or offline by downloading and using the mobile app on a phone or tablet. When signing in via the mobile app with network or internet coverage all current profiles will be automatically downloaded. The downloaded profiles will then be available next time the mobile app is accessed, whether network and internet coverage is available or not, by tapping the "View offline data" button. Members can also print a hardcopy of their CareMonkey record if attending an event where the Carer will not have electronic access to their profile. Hardcopy printouts should be securely destroyed following the event.

- Multiple profile requests – any secondary roles or hosting arrangements (Rovers and Venturers only) which are recorded in Extranet will also appear in CareMonkey and each formation that a member belongs to will be able to see the member's profile, providing the profile owner has specifically elected to share the profile with that formation.

- Manual tags – an Administrator can manually add a tag to profiles to allow the creation of sub-groups (Smart Groups) or eForms based on specific criteria. For instance all members of a group with a first aid qualification could be tagged or all Patrol Leaders could be tagged. Multiple tags can be added to any individual profile and tags can be added to describe any useful criteria. To add a manual tag to one or more profiles, click on the profiles that are to be given the tag (they will be highlighted to indicate that they have been selected) then in the top left corner of the screen, in the "Actions" drop-down menu, select "Add manual tags to Selected Profiles". Enter the text that briefly describes the criteria that is being tagged (eg. "*patrol-leader*") then click the "Add" button. These tags can then be used to create Smart Groups and eForms which will only include those members with the specified tag. Any members who are subsequently given the same tag will automatically be added to any Smart Group or eForm that uses that tag as a filtering criteria.

ADMINISTRATORS

The Administrator for a formation is initially the person who is recorded in Extranet as the Leader-in-Charge (LIC) of the formation.

- CareMonkey apps – after logging in to CareMonkey an Administrator will be able to change between CareMonkey applications by clicking on the drop down menu in the top left of their screen. The options are as follows:

  - **Care Central** is used to access their own CareMonkey profile. If they are a profile owner for their own children then those profiles would also be accessed through this option.

  - **Formation name** (eg. "4th Malvern") is used to administer CareMonkey for any formation for which they are LIC. There may be multiple formation names if they have more than one LIC role.

- Initial checklist – some key elements of CareMonkey which a Group Administrator should check as an initial priority are as follows:

  - Run a report of all Group members in Extranet and compare this with the profiles listed in CareMonkey. If there are youth members who do not have a profile in CareMonkey it will most likely be due to them not having a nominated Primary Carer in the Parental Detail(s) section of Extranet and/or the Primary Carer not having an email address in the Parental Detail(s) section of Extranet. Missing adult members in CareMonkey will most likely be due to them not having an email address recorded in Extranet. This information is available to Group Leaders in the Extranet Workflow under *Contact Details to be Updated*

  - Check for any green profiles in CareMonkey. This means their recorded email address is invalid and the member's family are not receiving emails from CareMonkey. Ascertain the correct email address and update the CareMonkey profile request via the Override email box.

  - Click on the Settings menu (⚙) in the bottom left corner of the screen and check that the two items in the "Messaging" section both start with "Disable …". If either of these options has a red background and starts with "Enable …" then click on that option and then click "OK" so that it changes to "Disable …". If these options have a red background it means that profile request emails are not being sent to members or Carers.

- Organisation Administrator – an Administrator can add or delete additional Administrators for their formation. Due to privacy issues however, another Administrator should only be appointed where there is a genuine need to do so and where it is reasonable for that person to have access to all profiles for the Group.

  - To add an Administrator click on the Settings menu (⚙) in the bottom left corner of the screen then the "Administrators" option under "Organisation

Settings". Enter the email address of the new Administrator exactly as it appears in their own CareMonkey profile then click "Create Administrator request".

➢ When an Administrator leaves the organisation the new Administrator or a higher level Administrator must manually delete them as an Administrator for that formation. To delete an Administrator click on the Settings menu then the "Administrators" option under "Organisation Settings" and then click the red circle with a cross next to their name.

- Organisation Settings – there are a number of system settings in CareMonkey which the Administrator can change by clicking on the Settings menu (⚙) in the bottom left corner of the screen, including:

➢ Contact details for the Group – the Administrator should change the "Administrator name", "Administrator title" and "Administrator email" fields to reflect their own details. Any local emails to Group members will then appear to come from them and replies will also go to them. If this is not done then any local emails will appear to come from the Executive Manager of Scouts Victoria and any replies will go to a generic CareMonkey email address.

➢ Allow group carers to create eForms – by clicking this box Carers will be able to create an eForm and attach members to it, although the eForm will still need final approval (enabling) by the Administrator.

- Sub-groups – an Administrator can create additional sub-groups within their formation for a variety of purposes. For example they may wish to create a sub-group for "Linking Scouts" or for a particular sub-set of adults such as "Leaders" or "Committee members".

➢ To create a sub-group click on the "Add" button in the Groups section in the bottom left corner of the screen then select "Add Sub-Group". Give the sub-group a name and then select whether people are to be added to the sub-group manually (by dragging and dropping) or automatically by using filters to create a Smart Group.

➢ A Smart Group is a sub-group (or an eForm) whose members are automatically added based on one or more chosen criteria. All people with the chosen criteria are automatically added to the Smart Group and people cannot be manually added to a Smart Group by dragging and dropping.

➢ To add people using a filter (ie. to create a Smart Group), click on the "Filtered members" option then double click on the applicable filtering option and select one or more of the relevant filters. The filtering options include Hierarchy (which filters on sub-group), Request (which filters on profile status), Shared Profile (which filters on personal, age or medical details), eForm Responses (which filters on responses to a selected eForm) or Manual Tags (which filters on any profile tags manually added by the Administrator).

- ➢ To manually add someone to a sub-group (other than a Smart Group), drag-and-drop their profile onto the sub-group. To manually add multiple people, click on the selected profiles to highlight them all then drag-and-drop any one of the highlighted profiles onto the sub-group, the others will all be added as well.

- Carers – Carers are those people who by the nature of their role have responsibility for the care of others and have a legitimate need to access the CareMonkey profiles of those in their care. For example a Cub Scout Leader could be a Carer for their Cub pack, or a first aider on a camp could be a Carer for the participants of that camp. Carer access to a Group, Section of eForm (event) can be assigned and removed as and when required.

  - ➢ For privacy purposes Carers should only have access to CareMonkey profiles when it is a legitimate requirement of their role and their access should be withdrawn during any other periods or if they leave the organisation.

  - ➢ To add a Carer, go to the Administrators home screen for the formation or Group (do not go into any sub-groups) and click on the "Add" button in the Group Carers section in the bottom right corner of the screen. Then select "Add single group carer request" and enter the name and email address of the person to be added as a Carer, ensuring that the spelling of both exactly matches the spelling they use in their own profile. In the section titled "Group Carer for the following groups" double click on the Group name then tick the relevant box for the Section (eg. Cub) that the person is to be given Carer access to, then tick the box for any eForms they will be given Carer access to, then click on "Save and send invitation".

  - ➢ A Carer can also be given access to sub-groups or eForms by dragging and dropping their Carer profile onto the relevant sub-group or eForm, or by clicking on the menu symbol in their Carer profile and then ticking the box for the relevant sub-group or eForm. Carer status can also be removed by unticking these boxes.

  - ➢ Administrators should also add themselves as a Carer for the Group (tick the box for the whole formation) otherwise they won't be able to see member profiles on the mobile app.

  - ➢ When a Carer leaves the organisation or for any other reason ceases to have responsibility for the care of others, the Administrator must delete them as a Carer for that formation. This is done by clicking on the menu symbol in their Carer profile then clicking on "Delete this group carer".

- Audit trail – an Administrator can view the contents of all emails and SMS's sent to a member by clicking on the menu symbol in the member's profile then selecting "View audit trail".

- Reports – an Administrator can view a variety of reports for their formation by clicking on the Reports/Archives menu () in the bottom left corner of the screen.

- Messaging Group members – by clicking on the menu symbol for a Group or a sub-group or by using the "Actions" drop down menu in the top left of the screen, an Administrator can select relevant members of the Group and then send them an SMS or email.

eFORMS

- Purpose of eForms – eForms within CareMonkey are typically used as electronic permission forms and communication tools for events and activities. They can also be used to conduct surveys or to get members or families to acknowledge a policy or consent to certain provisions.

- Creating an eForm – either an Administrator or Carer (if the Administrator has ticked the "Allow …" box in the "Settings" menu) can create an eForm, however only an Administrator can enable it. An Administrator creates an eForm by clicking on the "Add" button in the eForms section at the bottom of the screen whereas a Carer creates an eForm by clicking on "My eForms" in the top right corner of their screen. In both cases they then select whether they wish to start from an existing eForm, an eForm template or start from scratch.

- Completing an eForm – complete the first page (Description & Questions section) of the eForm as follows:

  - Title – enter a descriptive name for the eForm eg. *Otways Cub Camp 2017.*

  - eForm Type – select the "Excursion permission" option if the eForm relates to a specific activity with a start and finish date. A "Signed Custom Form" could be used for consent or acknowledgement purposes and an "Unsigned Custom Form" for surveys.

  - Requires up to date Care Profile? – this should be ticked "Yes" for all activities and events.

  - Description – enter a description of the activity. This will provide parents with information about the planned activity ie. who, what, where, when, why etc.

  - Member Selection – select whether people are to be added to the eForm by "Drag and drop" (manually adding individuals or groups of individuals), "All members" (automatically adds all members of the Scout Group), "Linked to groups" (automatically adds all current and future members of a selected sub-group such as the Cubs) or "Filtered members" (using one or more filters to add people). To add people using a filter, double click on the applicable filtering option and then select one or more of the relevant filters. The filtering options include Hierarchy (which filters on sub-group), Request (which filters on profile status), Shared Profile (which filters on personal, age or medical details), eForm Responses (which filters on responses to a selected eForm) or Manual Tags (which filters on any profile tags manually added by the Administrator).

> ➢ Questions – you can include a variety of different questions in the eForm such as multiple choice (eg. "Which activities would your child like to participate in from the following list ?"), single choice, yes/no, volunteer questions (eg. please indicate if you can assist with providing transport to this event) or questions in other formats.

> ➢ Additional tools – you can also attach other documents such as information sheets for a park being visited or an externally run activity.

- eForm settings – after saving the first page, or by selecting the "Settings" tab within an eForm, you can enter the start and end dates of the event, the cut-off date for responses and the frequency with which reminder emails are sent. You can also enable the eForm. Once an eForm is enabled it will immediately send emails to all profiles attached to it so ensure that the eForm is fully checked and completed before enabling it. It's wise to preview the eForm and send a test email to yourself (via the following two tabs) before enabling the eForm.   Any profiles that are subsequently added to an enabled eForm will be sent an email as soon as they are added to it. In the Settings tab you can also tick the box to "Add eForm replies to the care profile" which allows eForm responses to be viewed within a user's care profile.

- Attaching profiles – depending on the member selection option that was selected when creating the eForm, profiles will either be automatically added to the eForm or may need to be manually added. To manually add profiles to an eForm either drag-and-drop entire Groups or sub-groups (such as "Cub") onto the eForm or click on individual profiles to highlight them and then drag-and-drop any one of those profiles onto the eForm to add all of the highlighted people. For large events either the formation Administrator or the CareMonkey Administrator at the Branch office can do a bulk transfer of participants into the event using registration numbers. Carers and Administrators can also attach profiles to an eForm by clicking on "My eForms" in Care Central then "Assign profiles" in the relevant eForm. Click either the Section name if the entire Section is to be added to the eForm or else assign individual profiles to the eForm by clicking on them in the "Profiles Out" column, which will then move them to the "Profiles In" column.

- Attaching Carers – To attach a Carer to the eForm, first add the Carer if they are not already a Carer within the Group then either click on the menu symbol on their Carer icon and tick the relevant eForm under "Group carer for the following eForms", or drag-and-drop their Carer icon (located in the bottom right corner) onto the eForm.

- Viewing participant responses – by clicking anywhere on an eForm (other than the menu symbol) the profiles for the participants and their response status will be displayed. A green circle with a tick means they have accepted, a yellow circle with a question mark indicates no response as yet and a red circle with a cross indicates they have declined the invitation to attend. By clicking on the menu symbol of a participant's profile you can view their individual response to the eForm.

- eForm status – all of the formation's current and expired eForms will be visible in the eForms section at the bottom of the formation's home page. If an eForm has a box with a tick (☑) displayed in its icon then it is active and enabled, if it has a box with a cross displayed (☒) then it is either expired or not enabled. An eForm that is no longer required can be archived by clicking on the menu symbol for the eForm and then "Archive this eForm" in the menu on the left of the screen. An archived eForm cannot be re-used.

- eForm reports – for reports and other useful information about an eForm click on the menu symbol for the eForm and the menu on the left of the screen will provide a variety of options, including timelines (a history of when each participant received the emails and responded), a summary of responses and any completed roll-call reports. Carers can also access reports and information on the eForm through the "My eForms" menu when they log in. This includes access to a roll-call report which can be used to electronically record the presence of participants at any given times during the event.

- Messaging eForm members – Administrators and Carers can send emails or SMS messages to all eForm participants by clicking on the menu symbol for the eForm and then selecting from the options in the "Message eForm Members" section of the menu on the left of the screen.

- eForm templates – an eForm can be saved as a template for future use, for instance where similar events will be held in future and the layout and wording of the current eForm will be applicable to those events. To do this, click on the menu symbol for the eForm and then the "Save copy as a template" option in the "Manage eForm" section in the menu on the left of the screen. When a new eForm is added in future the template will be available by selecting the "Start from an existing eForm template" option.

- Medical eForms – a Medical eForm is automatically attached to each formation. This eForm will automatically contact all selected profile owners on a periodic basis and request them to review and update their medical details. The default frequency of these periodic reminders is every 12 months however by clicking the menu symbol for the Medical eForm the Administrator can increase this frequency where there is a need to do so. Apart from the frequency, this eForm should not be altered.

GENERAL

- CareMonkey as a communication tool – some Groups are increasingly using CareMonkey as a communication tool for emailing or SMS-ing members with updates to events or activities. Each active Group received an initial SMS credit in CareMonkey with the option to purchase, at the Group's expense, further credits directly from CareMonkey by clicking on the Settings menu (⚙) in the bottom left corner of the screen then selecting the "Manage SMS" option.

- Privacy obligations – it is imperative that all CareMonkey users understand that CareMonkey records are private and confidential. Administrator or Carer access should only be granted to registered members of Scouts and only where there is a demonstrable and legitimate need to do so. CareMonkey has an audit feature which tracks and records the details every time a profile is accessed.

- Accuracy of this Guide – please note that this Guide reflects the configuration of CareMonkey as at the version date on page 2. CareMonkey will advise users of any significant system changes as and when they occur.

FURTHER INFORMATION OR ASSISTANCE

- Click on "Help" then "FAQ's" when logged in to CareMonkey.

- Visit the CareMonkey website www.caremonkey.com and view their demonstration videos by clicking on the "Learn" menu then "Demonstrations".

- For technical problems, call the CareMonkey helpline on 8658 1424, email CareMonkey via support@caremonkey.com or use Live Chat when logged into CareMonkey.

- For Scouts-specific CareMonkey issues, email the CareMonkey Administrator at caremonkey@vicscouts.asn.au or call on 8543 9801.