CoActiveSoft Service Requests

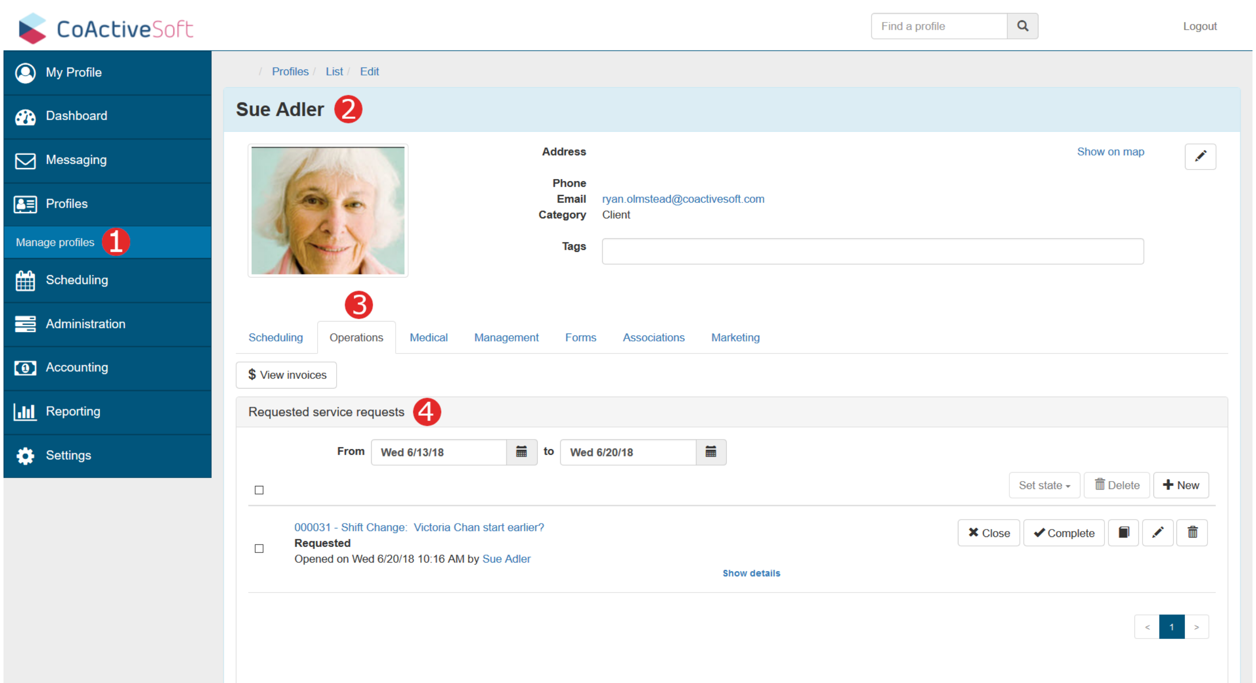
CoActiveSoft Service Requests

Service requests in CoActiveSoft can be thought of as help tickets. If a client would like to request that a caregiver modify their shift for their care, this would be a service request.

Service requests are created for a specific user by going to their profile. All service requests are shown to the administrator and can be resolved and assigned to caregivers or other employees.

Accessing Profile Service Requests

In a profile, the service requests section is located under the 'Operations' tab:



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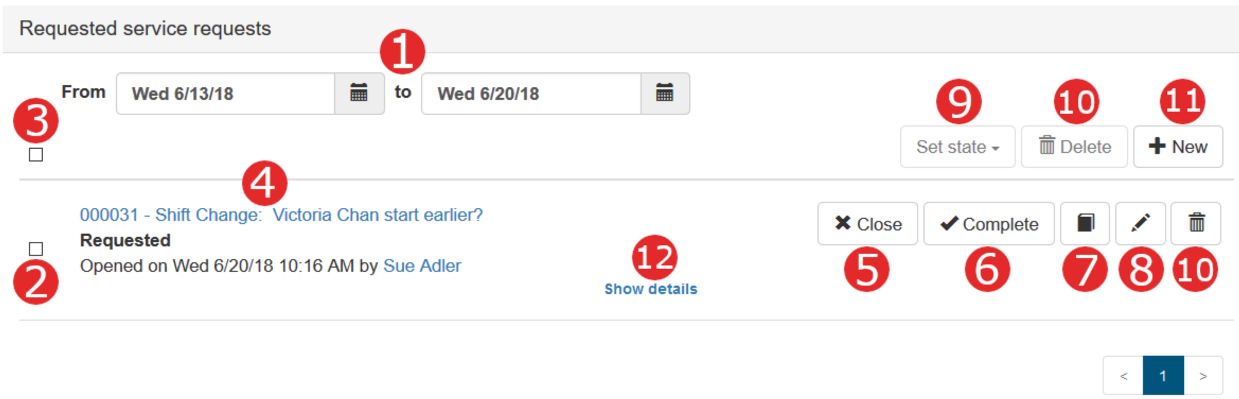
To get to a user profile, click on the ‘Profiles’ section under the main menu followed by ‘Manage Profiles’. Next, use the search box and filtering methods to find the correct user (2). The ‘Service requests’ section is under the ‘Operations’ tab.

Viewing Service Requests

After accessing the service requests section, there are many options and configurations:



1 – Date range

The date range shows all the service requests within the specified dates.

2, 3 – Select service request(s)

Select one (2), many (2), or all (3) service requests.

4 – Service request type and title

In the example above, the service request type is ‘Shift Change’ and the title is followed by that. The types of service requests available to choose from are ‘Care setup’, ‘General’, ‘Agency Internal’, and ‘Shift Change’. When a client is logged in, only the last two are visible. The service request type is set when creating a new service request.
Refer to the ‘Customizing Service Request Types’ section later in this manual for more

information.
The service request state is displayed below the title.

5 – Close the service request

This button is only visible to admins and supervisors.
Once a service request is abandoned, or it has been established that it does not need to be fully completed, the status of the service request can be closed.

6 – Complete the service request

This button is only visible to admins and supervisors.
Once a service request is completed, the service request can be marked as complete.

7 – Add log to service request

When adding a log to a service request, the log will be shown as an addition to the request with time and date of creation and creator of log listed.

8 – Edit service request

This button is only visible to admins and supervisors.
Use this button to edit a service request.

9 – Set state of service request

This button is only visible to admins and supervisors.
After selecting a service request, you can set the state as 'Requested', 'Assigned', 'In progress', 'Pending', 'Complete', 'Closed, and 'Canceled'. 'Requested' service requests have been created but have not been addressed yet. 'Assigned' service requests have been given an employee to handle the situation. 'In progress' service requests are currently being worked on. 'Pending' implies that the request is being worked on, but has stalled for one reason or another. 'Complete', 'Closed', and 'Canceled' refer to how the service request finished.

10 – Delete

This button is only visible to admins and supervisors.
Delete the service request(s) with this button.

11 – New service request

See the next section to learn about how to create service requests.

12 – Show details

Click on this button if you would like to see more information about the service request that was created, along with the actual body of the request.

Creating Service Requests

Service requests look different depending on what type of user is signed in. Agents have a longer version that shows the 'State', 'Requested by', and 'Assigned to' fields in addition to the usual ones:

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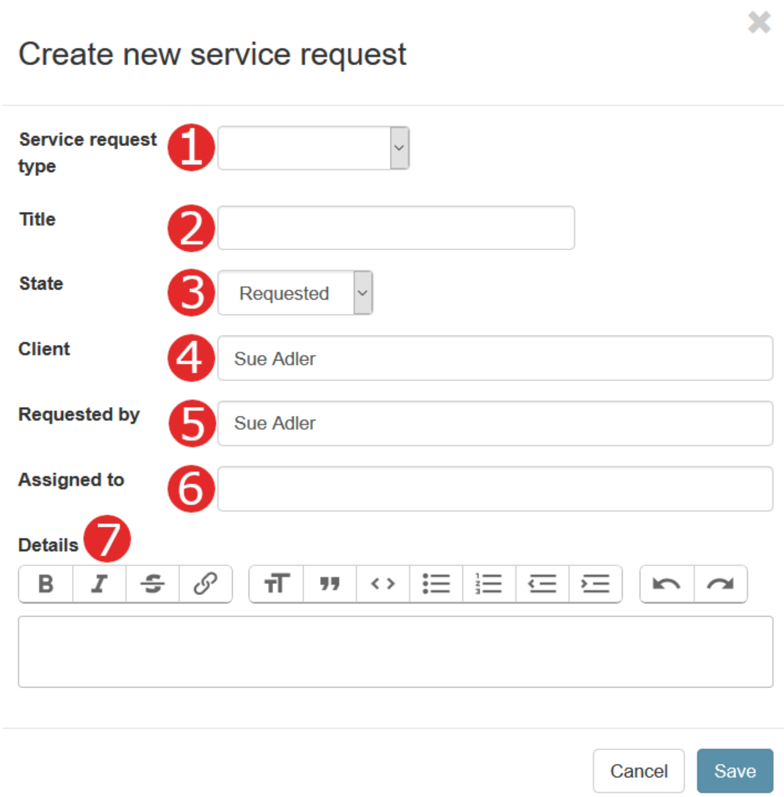


1 – Service request type

The types of service requests available to choose from are ‘Care setup’, ‘General’, ‘Agency Internal’, and ‘Shift Change’. When a client is logged in, only the last two are visible. Refer to the ‘Customizing Service Request Types’ section later in this manual for more information.

2 – Title

This is the title to be displayed to whoever views the service request.

3 – State

The ‘State’ section is only shown to users with admin and supervisor privileges.
You can set the state as ‘Requested’, ‘Assigned’, ‘In progress’, ‘Pending’, ‘Complete’, ‘Closed, and ‘Canceled’. ‘Requested’ service requests have been created but have not been addressed yet. ‘Assigned’ service requests have been given an employee to handle the situation. ‘In progress’ service requests are currently being worked on. ‘Pending’ implies that the request is being worked on, but has stalled for one reason or another. ‘Complete’, ‘Closed’, and ‘Canceled’ refer to how the service request finished.

4 – Client

In the ‘Client’ field, specify which client / profile the service request applies to – it automatically fills in as yourself if you create it.

5 – Requested by

As an admin or supervisor account, it is possible to specify who the service request was requested by.

6 – Assigned to

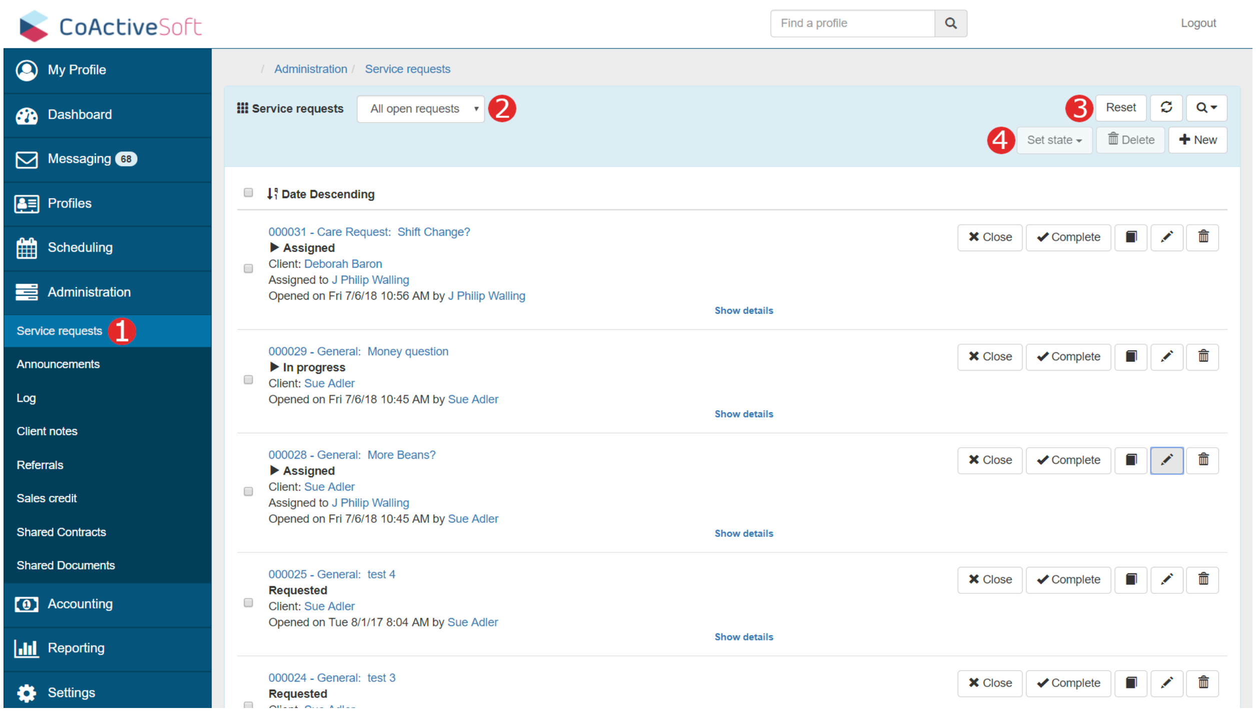
As an admin or supervisor, you can assign other users to service requests in order to delegate tasks more effectively. This can be useful for home care agencies that have different departments for dealing with different situations.

7 – Details

This is where the request body is entered in. It can be formatted like any other detail field. To see all the capabilities of the formatting this section is capable of, consult the end of the CoActiveSoft Documents and Contracts user manual.

Managing Existing / New Service Requests

The management of service requests are handled by admins and supervisors.
Service requests for admins to view and manage are located in the main menu under 'Administration' → 'Service requests' (1):



This is where all the service requests are managed. Here, the state of the service requests (4), the assigned users to a request, are all customized by an admin or supervisor. Refer to the earlier 'Viewing Service Requests' section for more information.

In this section, all service requests are ordered in descending order, so the most recent ones come first. To switch to ascending order, click on the arrow icon. By default it will only show the open requests, but that can be changed using the drop down (2). To filter the results further, you can use the advanced search (3) next to the refresh button. This enables you to search by a date range and specific profile.

For all employees that you want to be up to speed on service requests, add them to the 'Service request update' or 'Service request supervisor' messaging subscription in their profile.

To update a user's messaging subscriptions, navigate to their profile in CoActiveSoft. Next, click on the edit button in the top right ( ) of their profile. At the bottom of the editing window, there is a section to add messaging subscriptions for a user:

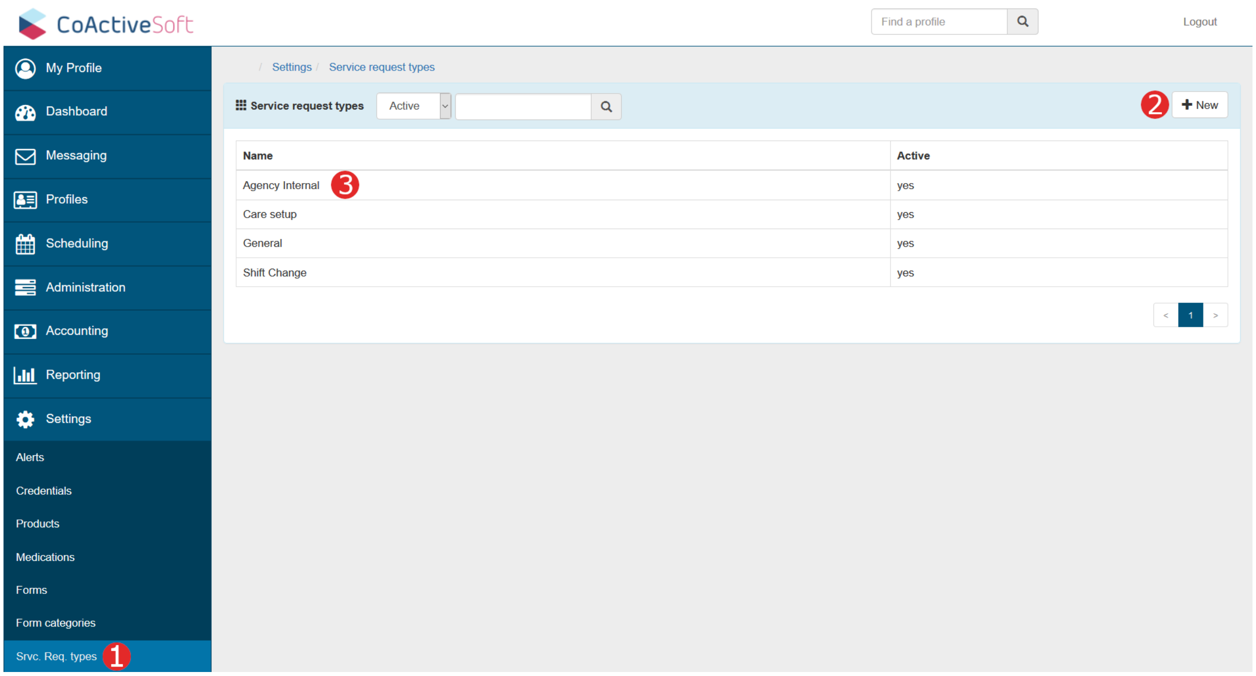
To add them to the 'Service request supervisor' or 'Service request update' messaging subscription, click on the drop down (1) and select it from the list of items. The users will be notified of any new service request and can act accordingly to them.
More information related to the messaging functions of CoActiveSoft can be found in the CoActiveSoft Messaging user manual.

Customizing Service Request Types

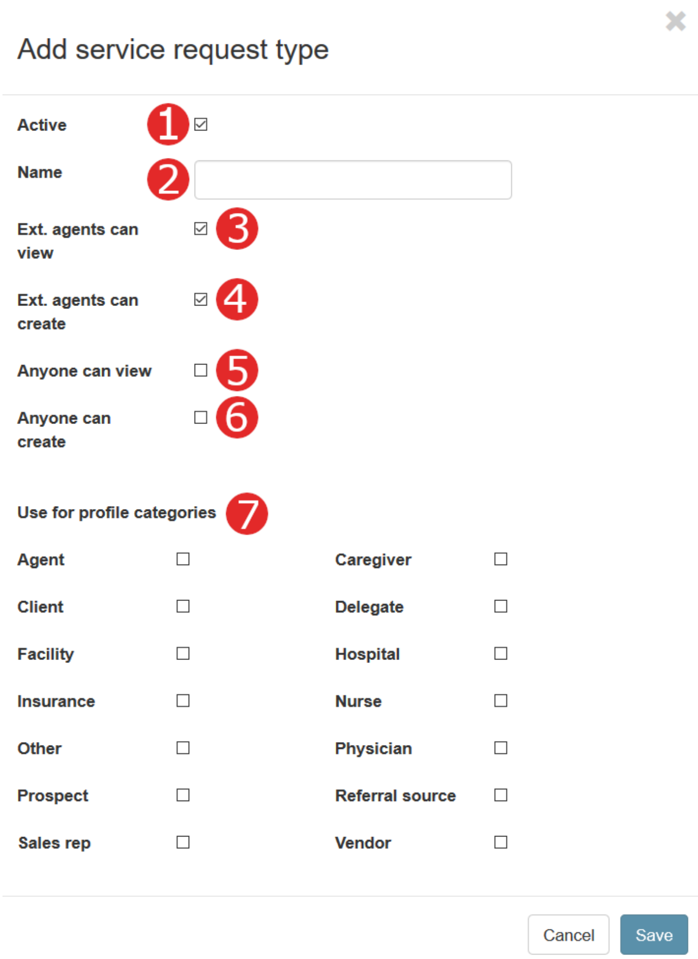
The customization of service requests are handled by admins and supervisors.
In CoActiveSoft it is easy to add different types of service requests that are more relevant to your home care service or business.

Creating A New Service Request Type

To create a new service request type, navigate to the main menu followed by the ‘Settings’ and ‘Srvc. Req. types’ (1). Next, click on the New button in the top right (2):



After clicking on the ‘New’ button, you will be presented with the ‘Add service request type’ page:



1 – Active

If this box is checked, then your new service request type will show up for all the user profile categories determined in the ‘Use for profile categories’ section (7).
If it is not checked, it will not be visible for anyone.

2 – Name

Put the name that you would like users to select for ‘Service request type’ when creating a new service request.

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3, 4 – External agents can view / edit

Check / uncheck these boxes to determine whether or not external agents (i.e. agent profiles that are not directly employed by your business) can view and/or edit this type of service request.

5, 6 – Anyone can view / create

Check / uncheck these boxes to determine whether or not anyone can view and/or edit this type of service request.

7 – Use for profile categories

In this field, select which profile categories can use this type of service request.

Editing an Existing Service Type

To edit an existing service type, click on the row that it is shown on. From there, you can click on the edit button ( ) in the top right. At this point, refer to the previous image for how to customize it - all of the fields are set up the same way.