

## CareMonkey Guide for Staff Carers

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## OVERVIEW

- [Purpose](#) – CareMonkey is the electronic system used by Scouts NSW for enabling parents/Carers/individuals to share member health records, permission forms and contact details and will replace over time the old E1 Activity Notification Form Part I & II paper forms.
- [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.

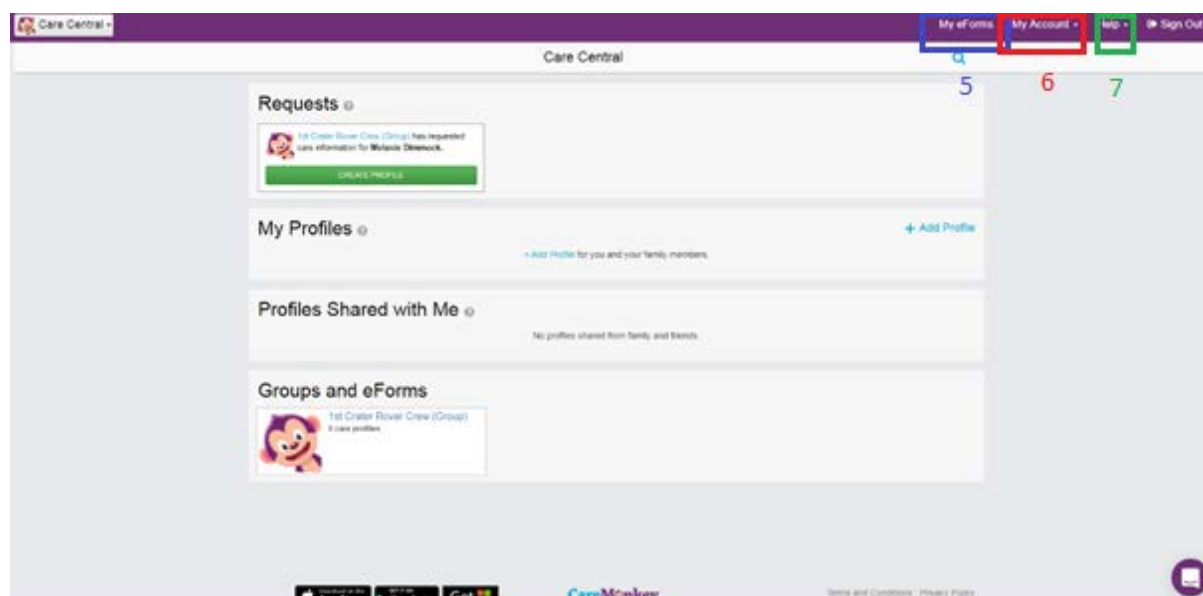
## Setup

As part of the setup, all Section Leaders, Assistant Section Leaders & Trainee Section Leaders – will be added to the appropriate section. After the initial setup it will be the responsibility of the Administrator to add and/or remove “Staff” as they are appointed / removed.

Staff carers will need to be set up but the administrator & linked to the appropriate section then can then easily be linked to a form of an Activity they are responsible for. If they are linked to a form, they will be able to see the profiles for the Members attending the Activity. It will also enable them to download profiles for those Activities that occur outside of normal mobile phone range. They will also be able to create eforms.

Staff 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 Staff Carer for their Cub pack, or a first aider on a camp could be a Staff Carer for the participants of that camp. Within CareMonkey, we can assign and remove Staff access as and when required. A person can be assigned as a Staff Member for a Group, Section or event (eForm). For privacy purposes, Staff 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.

## SCREEN OVERVIEW



### 1. Requests

This is where your medical profile requests will be, this is where you can create or share your medical profile through this.

### 2. My Profiles

This is where your current medical profile will be stored

### 3. Profiles Shared with Me

Any profiles shared with you from family & friends will be located here.

### 4. Groups and eForms

This is where you will be able to see the groups you are associated with and any current eforms for your section

### 5. My Forms

This is where you will create your eforms

### 6. My Account

You can edit your account settings here

### 7. Help

You can start a live chat with CareMonkey (you can also click the icon in the bottom right corner for this) or find Care Monkey's FAQ's here.

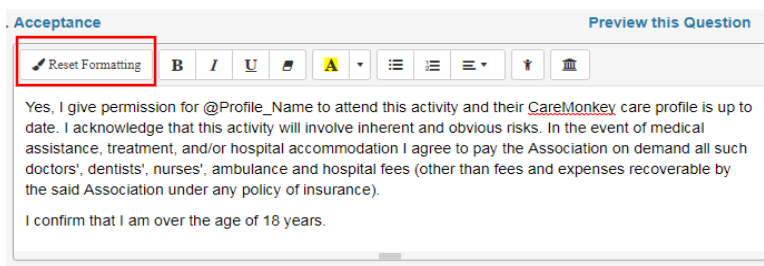
## eFORMS

- [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 as a general acknowledgement form where the formation or organisation requires members to acknowledge or consent to certain provisions.
- [Creating an eForm](#) – either an Administrator or Staff Carer (if the Administrator has ticked the “Allow ...” box in the “Settings” menu) can create an eForm, however only an Administrator can enable it. To create an eForm click on the “My eForms” button in the top right section of the your screen.
- For [Event eForms](#), please use the “Scouts NSW Activity Template” with the latest date. Complete the fields in the template as per the instructions below. Please do not remove any of the questions, but add additional questions if necessary.
- [Completing the eForm](#) – complete the “Description & Questions” tab as follows:
  - Title – enter a descriptive name for the eForm e.g. *Cub Camp 2 Dec 2017*.
  - Type – select the “Event” option for any eForm that relates to a specific event or activity. “Custom Forms” would usually be used as acknowledgement, consent or information forms in other circumstances.
  - Requires up-to-date Care Profile – Yes. This makes it mandatory for a parent / profile owner to confirm that the care profile is up to date when they sign acceptance. You will see the Acceptance statement is lengthy – please leave this unchanged. The @Profile\_Name inserts the member’s name into the eform, making it more personalized.
  - Description – enter a description of the activity. This will provide parents with information about the planned activity i.e. where, who, when, why, what etc. Click in the description and enter the information against the headings provided.

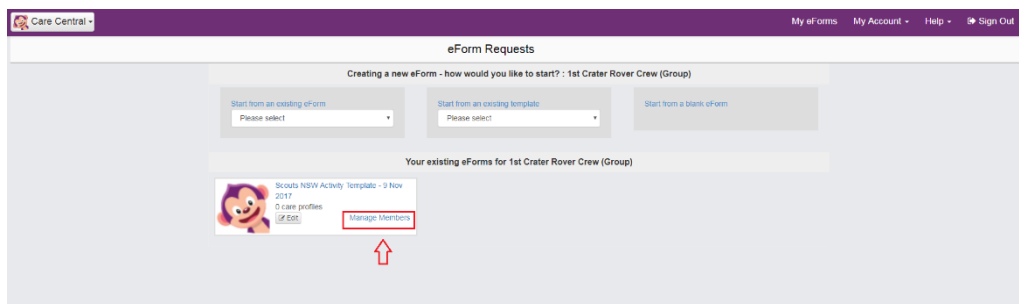
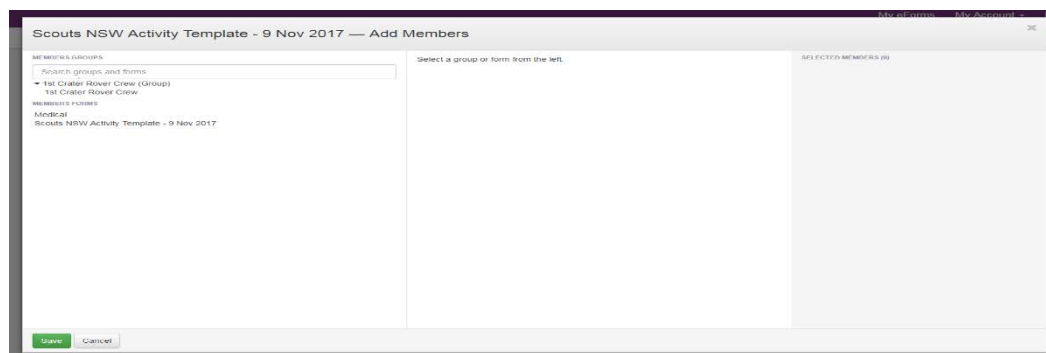
This will be included in the email that is sent out, so an outline of the activity will allow parents to know upfront what they are signing into CareMonkey to see.

- General Notes – Enter the details of the activity – route, itinerary, packing list, maps, gear, and all the details that parents need to know. This used to be included in the “Additional Details” box on p2 of the E1 Activity notification Form Part I & II.
- Questions – you can include a variety of different questions in the eForm such as multiple choice (e.g. “Which activities would your child like to participate in from the following list ?”), single choice, yes/no, volunteer questions (e.g. 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.

- Member Selection – Staff members are only able to Drag and Drop members to an eForm.
- [eForm settings](#) – 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. Here you can also select who the responses will be emailed to.
- [Enabling and eForm](#) - An eForm will need to be enable by an Administrator. Once an eForm is enabled, it will immediately send emails to all profiles attached to it so ensure that the eForm is fully completed before enabling it. It is wise to preview the eForm and send a test email to yourself before enabling the eForm. Any profiles that are subsequently attached to an enabled eForm will be sent an email as soon as they are attached to it. In the Settings tab, you can also tick the box to “Add eForm replies to the care profile” which provides another option for viewing the responses of event participants.
- [Signatures & Acceptance](#) – When creating an eForm, be sure to reset the formatting on the acceptance to send the full declaration used to be covered by Scouts insurance in line with the E1 form.



- [Attaching profiles](#) –Under the My eForms section you will find your existing eForms. To attach profile select Manage members

This will bring up the sections you are attached to. You will need to select the appropriate section of which the eForm is for, the list of members for the section will appear in the middle column, click on each member who requires the eForm or click select all, once all the appropriate members appear in the Selected members column you can click save which will then send out the eForm to the members provided it has been enabled by an administrator.

- [Viewing participant responses](#) – by clicking anywhere on the eForm 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 yet and a red circle with a cross indicates they have declined the invitation to attend.
- [eForm reports](#) – for reports and other useful information about an eForm, click on the eForm title or the edit option and the menu on the left of the screen will provide a variety of options. This includes timelines (a history of when each participant received the emails and responded), a summary of responses, any completed roll-call reports and options to send emails and SMS's to participants (for instance if the return bus is running late). 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.
- [Archiving eForms](#). Once the Activity has run, The Administrator should archive the eForm. This is to ensure the privacy of the profiles, and to ensure that the profiles attached to that eForm will not be available on mobile devices.

## FURTHER INFORMATION

- Clicking on “Help” then “FAQ’s” when logged in to CareMonkey.
- Visiting the CareMonkey website [www.caremonkey.com](http://www.caremonkey.com) and viewing their demonstration videos by clicking on the “Learn” menu then “Demonstrations”.
- For technical problems, using Live Chat when logged into CareMonkey, emailing CareMonkey via [support@caremonkey.com](mailto:support@caremonkey.com) or calling the CareMonkey helpline on 03 8658 1424.
- For Scouts-specific CareMonkey issues, emailing the CareMonkey Administrator at [caremonkeysupport@nsw.scouts.com.au](mailto:caremonkeysupport@nsw.scouts.com.au), or call us on 02 9735 9000.