

Optimus Health

FOR HOME CARE TEAMS

Care Worker Management System

Coordinate care. Support the workforce.
Keep the office connected.



A product by WeebPal



Optimus Health

One place for everyday care operations

Optimus Health



A clear enquiry handover

Route the care address to a local office. Keep the contact, care request and quote together.



A planned care workforce

Set recurring schedules and visit windows. The coordinator chooses the care worker for each call.



Care context in the field

Show assigned visits and care instructions. Capture the visit record and actual hours in the browser.

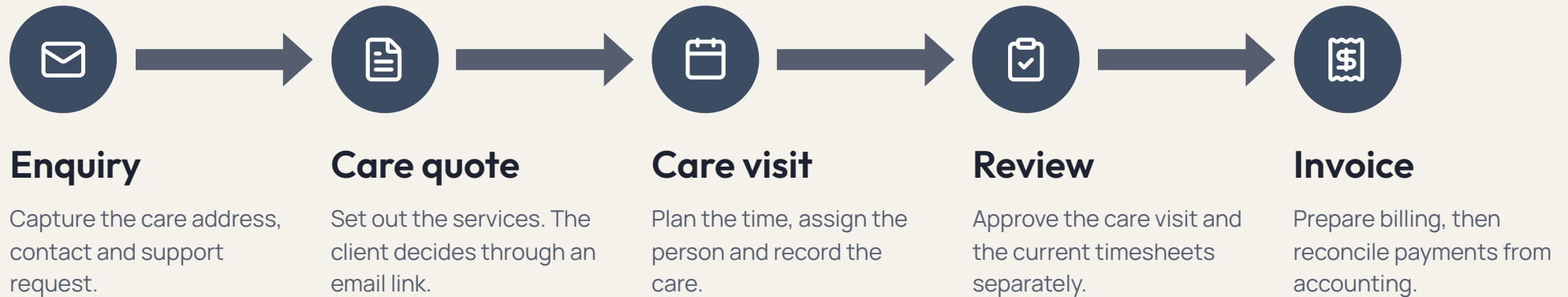


Recorded work into billing

Review care and hours separately. Prepare invoices and follow payments through the accounting connection.

From the first enquiry to the invoice

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One visit or ongoing care

A quote can create the first visit. A separate schedule generates recurring visits.

A clear billing gate

Approved care and approved current hours are required before chargeable assignments reach billing.

A workspace for each role

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Care Worker

Own assigned visits and rota

Care instructions and visit records

Timesheets for office review



Care Coordinator

Office enquiries, clients and quotes

Schedules and worker assignments

Care visit and timesheet review



Office Owner

Office operations and team access

Website and accounting connection

Office finance and reports



Company oversight

Headquarters: offices and territories

Network Manager: read-only totals

Operational records stay in each office

Help families find their local team

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Find your local team · sample workspace

FIND YOUR LOCAL TEAM

Tell us about the care you need

Enter the address where care is needed. After you send it, we use the address to find the local team that covers that area and pass your enquiry to them. If no single team covers it, our headquarters routes it by hand.

**Sent to the team covering that address**

We use the address you give to find the local team that covers it.

**No-obligation enquiry**

Talk through the care needed before deciding whether to go ahead.

**Private to your local team**

Your details go only to the team identified for that area.

If no single local team covers the address, we keep your enquiry and a person routes it. You will still get an acknowledgement either way.

**Your enquiry**

We pass this enquiry to the local team after you send it

Your name *

Telephone (optional)

Email address *

Address where care is needed *

House or flat, street, town, postcode

The address of the person who needs care. Used after you send the form to find the local team that covers it.

Care needed *

Preferred care start date (optional)

Tell us about the care you need *

Who needs care, what help would make the biggest difference, and how often.

☐ I agree that Optimus Health may use the address I give to find the local team that covers it, including by looking the address up on a map with a mapping service, and that the team it is passed to may contact me about this enquiry. *

☐ Optional: send me occasional news and care tips by email. I can unsubscribe at any time.

Route by the care address

Enter the place where support is needed, so the request reaches the relevant office.

Capture a useful request

Provide the care need, contact details and preferred start date.

Keep a clear fallback

Headquarters reviews requests that cannot be allocated to one office.

MAKE AN ENQUIRY

05

Make the local office easy to reach

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Local office website · screen excerpt

HOME CARE & SUPPORT

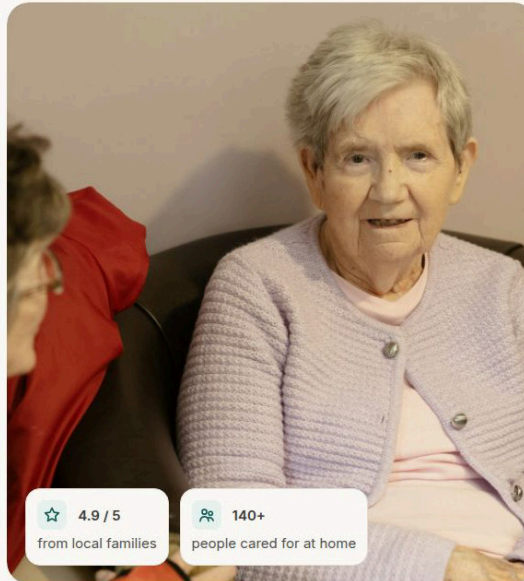
Care at home you can trust, across Cardiff

From a 30-minute morning call to live-in support, Optimus Health Cardiff helps older people stay safe, comfortable and independent at home, with the same familiar care worker at every visit.

Book a free care assessment

Explore our services

✓ Enhanced DBS-checked carers ✓ Fully insured ✓ Registered with CIW



01 Local office website

Present local services, the team and the contact route.

Office enquiry form · screen excerpt

Email address *

jane@example.co.uk

Required — we send your acknowledgement here.

Address where care is needed *

House or flat, street, town, postcode

The address of the person who needs care, so the team can plan visits.

Care needed *

Select a type of care

Preferred care start date (optional)

mm/dd/yyyy

Choose the closest option; the team can talk it through with you.

Leave blank if you are flexible.

Tell us about the care you need *

Who needs care, what help would make the biggest difference, and how often.

02 Office enquiry form

Capture the care address and support request for this office.

The local office receives the request directly.

Keep each care enquiry moving

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Enquiry pipeline · sample workspace

Pipeline board

Open a card to review the enquiry and use its guarded workflow actions. Showing 50 of 74 enquiries; 43 open on this page.

 Live view

 New 25 ^

Mrs Joan Pritchard ...

ENQ-2026-0077

Personal Care

Website · 04/10/2026 08:42

Handled by: Unassigned

Est. value —

• Normal

 Contacted 7 ^

The Wilson Family ...

ENQ-2026-0065

Meal Preparation & Nutrition

— · 09/09/2026 06:44

Handled by: Priya Nair

Est. value —

• Normal

 Qualified 7 ^

Oakfield House ...

ENQ-2026-0021

Personal Care

Manual · 06/08/2026 09:43

Handled by: Priya Nair

Est. value £1,872.00

• Normal

 Quoted 4 ^

Mr David Kerr ...

ENQ-2026-0014

Personal Care

Website · 06/08/2026 23:52

Handled by: Priya Nair

Est. value £2,496.00

• Normal

 Won 4 ^

Mrs Ann Collier ...

ENQ-2026-0044

Meal Preparation & Nutrition

Email · 08/08/2026 00:14

Handled by: Priya Nair

Est. value —

• Normal



Find the request

Search and filter the office's care enquiries.



Keep the office involved

Review the contact, owner and current stage.



Move the conversation forward

Record progress towards a client and care quote.

COORDINATE CARE

07

Keep the client and location together

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Client context · screen excerpt

Client record Contacts Care locations Visit history Financial history Visit record photos Enquiries and quotes

Client record

The source record for this account.

Client reference OHC-C0037	Status ● Prospect	Client since 09/09/2026
Client type Housing provider	Primary contact Kate Mallory	Billing contact Kate Mallory
Billing address Suite 2, 5 Heol Fach Whitchurch Cardiff CF14 1SB United Kingdom	Phone 029 2018 0421	Email office@heolfachha.example
Payment terms 30 Days	Marketing consent Off	

Lifecycle

Current state and the transitions open from it.

Status ● Prospect	Client since 09/09/2026
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Activate

01 Client context

Keep the contacts, billing party and care locations connected.

Access instructions · screen excerpt

🔑 Access instructions

Practical instructions for reaching and entering this care location, such as the key safe.

Key safe to the left of the front door; code from the office, never written down. Knock and call out as you let yourself in — Eleanor may be dozing in her chair. Return the key to the safe when you leave.

02 Access instructions

Read the location's arrival and entry instructions.

Access instructions and recorded risk notes stay with the care location.

Prepare a clear care quote

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Care quote · sample workspace

OHC-Q0021 · Care quote overview ✓ Accepted
Version 1

Origin
Enquiry

Enquiry
ENQ-2026-0005

Client
OHC-C0001

Home
14 Willow Mews

Recipient contact
Siân Hughes

Issue date
25/08/2026

Valid until
24/09/2026

Currency
GBP — Pound sterling

Care quote lines
Stored line values and totals for this care quote version.

#	ITEM CODE	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	DISCOUNT	TAX	LINE NET	LINE TAX	LINE TOTAL	OPTIONAL
1	COMP-3H	Companionship afternoon with a trip to the memory café, 3.5 hours Companionship	3.5	Hour	£28.00	—	20%	£98.00	£19.60	£117.60	Included
Subtotal										£98.00	
Tax total										£19.60	
Total										£117.60	



Set out the care package

Describe services, quantities and charge lines.



Include the choices

Separate required services from optional quote lines.



Send it for a decision

The client accepts or rejects through an emailed link.

Plan regular care and see the rota

Care package schedules · screen excerpt

Care package schedule register

Review care package schedules, active periods and generation horizons. Daily care is a Weekly schedule with all seven weekdays; several calls a day are several schedules.

REFERENCE	CLIENT	FREQUENCY	STARTS	ENDS	HORIZON (DAYS)	GENERATED TO	STATUS	UPDATED	ACTIONS
OHC-C0007	Mrs Margaret Lewis	Weekly	04/10/2026	—	14	05/10/2026	✓ Active	04/10/2026	
OHC-C0007	Mrs Margaret Lewis	Weekly	04/10/2026	—	14	05/10/2026	✓ Active	04/10/2026	
OHC-C0007	Mrs Margaret Lewis	Weekly	04/10/2026	—	14	05/10/2026	✓ Active	04/10/2026	
OHC-C0032	Harriet Langdon	Quarterly	19/09/2026	11/09/2027	120	—	✎ Draft	11/09/2026	
OHC-C0018	Claire & Rob Ashby	Seasonal	17/09/2026	07/08/2027	120	—	✎ Draft	11/09/2026	
OHC-C0001	Mrs Eleanor Hughes	Weekly	02/09/2026	—	120	03/01/2027	✓ Active	05/09/2026	
OHC-C0002	Ty Seren Respite Trust	Fortnightly	07/04/2026	—	60	04/11/2026	✓ Active	05/09/2026	
OHC-C0001	Mrs Eleanor Hughes	Weekly	06/02/2026	01/09/2026	60	01/09/2026	🗑️ Ended	05/09/2026	

01 Care package schedules

Generate future visits from Weekly or Fortnightly schedules.

Calendar detail · screen excerpt

WED	THU	FRI
30 09:00 OHC-V0152 · Approved	1 09:00 OHC-V0214 · Completed	2 07:30 OHC-V0218 · Failed 09:00 OHC-V0028 · Completed
7 09:00 OHC-V0033 · Scheduled	8 09:00 OHC-V0034 · Scheduled	9 09:00 OHC-V0035 · Scheduled

02

Calendar detail

Review planned calls and their recorded status.

The coordinator reviews the planned rota before delivery.

Plan with care worker capabilities

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Skills and qualifications · screen excerpt

Competency

Skills

Medication Administration Meal Preparation Contenance Care Moving & Handling

Learning Disability Support Personal Care Dementia Care

Qualifications

Enhanced DBS Check First Aid Health and Social Care Level 3 Medication Administration

Safeguarding Adults Social Care Wales Registration

01 Skills and qualifications

Record the capabilities used to match people to care visits.

Declared working hours · screen excerpt

Declared working hours

Day	Start	Finish
Monday	07:30	16:00
Tuesday	07:30	16:00
Wednesday	07:30	16:00
Thursday	07:30	16:00
Friday	07:30	16:00

02 Declared working hours

Use weekday availability when planning assignments.

Availability supports the office's assignment decision.

Choose who will deliver the visit

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01 · Review skills, availability and matching findings · sample candidates

FIRST NAME	SKILLS	QUALIFICATIONS	REMAINING CAPACITY IN VISIT WINDOW	MATCHING FINDINGS
Maria Santos	Medication Administration, Meal Preparation, Continence Care, Moving & Handling, Learning Disability Support, Personal Care, Dementia Care	Enhanced DBS Check, First Aid, Health and Social Care Level 3, Medication Administration, Safeguarding Adults, Social Care Wales Registration	3.000	
Joy Adebayo	Personal Care, Catheter Care, Companionship & Activities, Stoma Care, Dementia Care	Moving & Handling, Care Certificate, Health and Social Care Level 2, Enhanced DBS Check, Social Care Wales Registration	3.000	

02 · Choose the care worker and planned hours · the office makes the decision

Operative *

The operative taking this visit.

Planned hours

Expected hours for this operative. Compared with the current approved timesheet at review.

Match override note

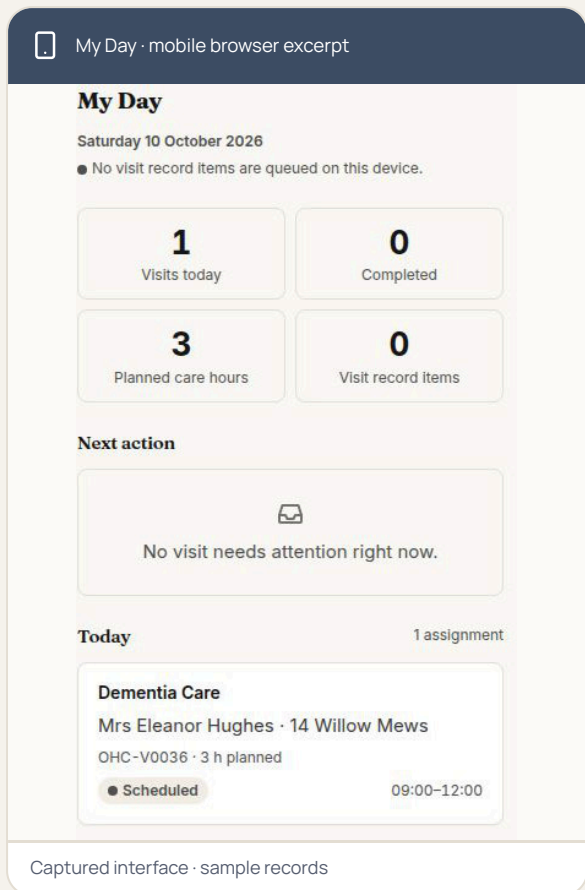
Why a soft competency warning was overridden.

Assign care worker ✓

Cancel ✕

Give the care worker a clear day

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See assigned calls

Review the visits planned for the day.



Open the visit context

Find the care location and relevant contacts.



Use the field app

Open the care instructions and actions in the web browser.

Carry care instructions into the visit

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 Care plan summary · mobile browser excerpt

 **Care plan summary**

Care tasks and notes recorded by the office before the visit

Scope of works

Morning call: help Eleanor wash and dress, breakfast and her morning tablets from the blister pack (sign the MAR chart); a short walk with her walking frame if it is dry.

Access requirements

Key safe to the left of the front door; code from the office, never written down. Knock and call out as you let yourself in — Eleanor may be dozing in her chair. Return the key to the safe when you leave.

Risks and safety requirements

Falls risk: walking frame indoors and a stairlift to the first floor. Allergic to penicillin and to sticking plasters. DNACPR in place — the form is in the red folder on the hall table. Can become anxious late in the morning; reassure her and offer a drink.

Captured interface · sample records



Read the care plan summary

Review the visit's tasks, access instructions and risk notes.



Understand access and risks

Carry the office's location notes into the assigned call.



Record the outcome

Describe the care given and observations when completing the call.

Create a visit record for office review

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Visit record capture · mobile browser excerpt

Add to the visit record

Photo or document *

 No file chosen **Choose file**

Photos must be JPG, PNG, WEBP, HEIC, HEIF.
Documents must be PDF. Maximum file size 12 MB. The server verifies the actual bytes before private storage accepts it. Up to 5 photos per visit. 5 more can be added, and you can choose several at once.

Take a photo +

Category *

☐ Before

☐ During

☐ After

☐ Document

Which stage of the work this evidence shows.

Captured interface · sample records



Add the work done

Group photos and documents with the visit and a note.



Keep correction history

Add a corrective record when another item is needed.



Complete the record

The office can check the record alongside the care outcome.

Record the hours and agreed costs

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Timesheet entry · mobile browser excerpt

Hours worked *

2.867

Your actual care hours, checked against the recorded start and finish times.

Start time *

09:05 AM

Enter the actual start time.

Finish time *

11:57 AM

Must be after the start time.

Travel time

30

Travel from your previous visit (or from your base for the first visit of the day) to this care location. Enter it in whole minutes.

Captured interface · sample records



Record actual work

Enter the care hours for the visit.



Include travel and costs

Add travel time and agreed additional costs such as mileage.



Submit for review

Send the timesheet to the office and revise it if returned.

Review care and hours before approval

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Care visit review · screen excerpt

Care visit
OHC-V0305

Approved

Visit overview

Client
OHC-C0001

Source schedule
OHC-C0001 · Weekly from 06/02/2026

Scheduled start
02/07/2026 10:00

Home
14 Willow Mews

Service type
Personal Care

Scheduled end
02/07/2026 13:00

Visit outcome

Work started
02/07/2026 10:05

Work finished
02/07/2026 13:05

Assignments

CARE WORKER	STATUS	PLANNED HOURS	UPDATED ▾
Maria Santos (OHC-OP0001)	✓ Assigned	—	27/06/2026

Actions

Generate invoice

Edit visit

Archive visit

01 Care visit review

Review the visit outcome and its care record before approval.

Hours review · screen excerpt

STATUS	UPDATED ▾	OPERATIONS
→ Submitted	04/10/2026	View Approve Return for a change
→ Submitted	04/10/2026	View Approve Return for a change
→ Submitted	04/10/2026	View Approve Return for a change

02 Hours review

Approve the current timesheet or return it with a reason.

Care approval and hours approval remain separate.

Prepare invoices and follow payments

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Invoice charge lines · screen excerpt

Invoice lines

Stored line values and stored header totals for this invoice.

LINE NUMBER	ITEM CODE	DESCRIPTION	SOURCE TYPE	QUANTITY	UNIT	UNIT PRICE	TAX PERCENT SNAPSHOT	LINE NET	LINE TAX	LINE TOTAL
1		Morning care call, two care workers, 3 hours	Recurrence	6	Hour	£28.00	20%	£168.00	£33.60	£201.60
2	SUNDRIES	Continence pads bought for Eleanor, recharged at cost	Expense	1	Item	£8.50	20%	£8.50	£1.70	£10.20
Subtotal										£176.50
Tax total										£35.30
Total										£211.80

01 Invoice charge lines

Prepare charges from approved visits and current approved hours.

Payment matching · screen excerpt

STATUS	PAID	UPDATED ▾	ACTIONS
✓ Reconciled	29/08/2026	16/08/2026	
⏸ Unmatched	07/08/2026	16/08/2026	<button>Match to invoice</button>
✓ Reconciled	08/08/2026	08/08/2026	

02 Payment matching

Review imported payments. Payment itself happens outside this system.

Match imported records with the appropriate invoice.

Prepare approved hours and supplier bills

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Approved hours · screen excerpt

Approved hours

Export CSV

PAY PERIOD
START END

This date box uses your browser's date format.

DATE WORKED ▲	VISIT	CARE WORKER	CARE HOURS	TRAVEL TIME	APPROVED
18/03/2026	OHC-V0050	Maria Santos	3.000	0.500	19/03/2026
25/03/2026	OHC-V0052	Maria Santos	3.500		26/03/2026
01/04/2026	OHC-V0053	Maria Santos	4.000		02/04/2026
20/05/2026	OHC-V0065	Maria Santos	3.000		21/05/2026
27/05/2026	OHC-V0066	Maria Santos	3.000		28/05/2026

01 Approved hours

Filter approved hours by period and export for payroll preparation.

Draft self-bill actions · screen excerpt

Actions

Only actions allowed for this status and your permissions are shown.

Download PDF

Issue self-bill

Cancel draft

02 Draft self-bill actions

Prepare a draft supplier bill from approved, unbilled timesheets.

Only approved, unbilled subcontractor timesheets contribute.

Keep attention on the office work

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Operations exceptions · sample workspace

E2 — Unstaffed generated visit

TYPE	RECORD	WHY	SINCE	FIX
E2 Unstaffed generated visit	OHC-V0262	A recurring schedule generated this visit and nobody is assigned to it. The schedule names no default operative, so nothing was pre-assigned.	1 month 3 weeks	Assign an operative
E2 Unstaffed generated visit	OHC-V0288	A recurring schedule generated this visit and nobody is assigned to it. The schedule names no default operative, so nothing was pre-assigned.	1 month 2 weeks	Assign an operative
E2 Unstaffed generated visit	OHC-V0292	A recurring schedule generated this visit and nobody is assigned to it. The schedule names no default operative, so nothing was pre-assigned.	1 month 2 weeks	Assign an operative
E2 Unstaffed generated visit	OHC-V0296	A recurring schedule generated this visit and nobody is assigned to it. The schedule names no default operative, so nothing was pre-assigned.	1 month 1 week	Assign an operative
E2 Unstaffed generated visit	OHC-V0299	A recurring schedule generated this visit and nobody is assigned to it. The schedule names no default operative, so nothing was pre-assigned.	1 month	Assign an operative



Find the issue

Review the work awaiting an office action.



Resolve the cause

Open the related visit, timesheet or finance record.



Follow office activity

Use operational reports to review the recorded work.

Give the owner the office controls

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Team accounts · screen excerpt

ACCOUNT	ROLE	ACTIVE		
	- Any -	- Any -		

ACCOUNT	EMAIL	ROLES	ACTIVE	LAST SEEN	ACTIONS
Nadia Hussain	nadia.hussain@optimushealth.test	Care Worker	Blocked	Not recorded	<button>Reactivate</button>
Ethan Cross	ethan.cross@optimushealth.test	Care Worker	Blocked	Not recorded	<button>Reactivate</button>
Ben Turner	ben.turner@optimushealth.test	Care Worker	Active	11/08/2026	<button>Deactivate</button>
Olivia Grant	olivia.grant@optimushealth.test	Care Worker	Active	09/09/2026	<button>Deactivate</button>
Owen Hughes	owen.hughes@optimushealth.test	Office Owner	Blocked	11/08/2026	
Kasia Nowak	kasia.nowak@optimushealth.test	Care Worker	Active	07/09/2026	<button>Deactivate</button>
Laura Price	laura.price@optimushealth.test	Office Owner	Blocked	09/08/2026	

01 Team accounts

Control office account access within the agreed seat limit.

OFFICE OVERSIGHT

Page publication · screen excerpt

STATUS	UPDATED	ACTIONS
Published	04/10/2026	
Published	04/10/2026	
Published	04/10/2026	
Unpublished	04/10/2026	
Published	04/10/2026	
Published	04/10/2026	
Published	04/10/2026	

02 Page publication

Review published and unpublished states, then open the page controls.

The Office Owner maintains the local public website.

Run the company's office network

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Office register · screen excerpt

OFFICE	STATUS	SEATS	SLUG	UPDATED ▾	ACTIONS
Optimus Health Lancaster	● Onboarding	12	optimus-health-lancaster	04/10/2026	 
Optimus Health Penarth	● Active	5	optimus-health-penarth	04/10/2026	 
Optimus Health Ulverston	● Onboarding	5	optimus-health-ulverston	04/10/2026	 
Optimus Health Kendal	● Closed	2	optimus-health-kendal	04/10/2026	 
Optimus Health Barrow-in-Furness	● Active	4	optimus-health-barrow-in-furness	04/10/2026	 
Optimus Health Bridgend	● Suspended	8	optimus-health-bridgend	04/10/2026	 
Optimus Health Swansea	● Active	2	optimus-health-swansea	04/10/2026	 
Optimus Health Newport	● Active	14	optimus-health-newport	04/10/2026	 
Optimus Health Cardiff	● Active	8	optimus-health-cardiff	04/10/2026	 

01 Office register

Headquarters opens offices and manages each office's lifecycle.

Territory coverage · screen excerpt

TERRITORY	CODE	COVERAGE	STATUS
Barrow-in-Furness	—	Area drawn	Draft
Bridgend	—	Area drawn	Draft
Cardiff	—	Area drawn	Draft
Kendal	—	Area drawn	Draft
Lancaster	—	Area drawn	Draft
Newport	—	Area drawn	Draft
Penarth	—	Area drawn	Draft
Swansea	—	Area drawn	Draft
Ulverston	—	Area drawn	Draft

02 Territory coverage

Maintain named coverage areas used to allocate care enquiries.

Coverage supports allocation of the shared care enquiry.

See the network and each office's activity

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Assigned network · read-only office register excerpt

Network offices

Open an office name for its read-only aggregate summary. No operational action is available here.

OFFICE	TERRITORY	STATUS
Optimus Health Cardiff	Cardiff	• Active
Optimus Health Newport	Newport	• Active
Optimus Health Swansea	Swansea	• Active

Office summary · whole-history visit counts · sample records

Work delivery

Care visit, completed-visit, visit record and approved-timesheet counts for this office across available history.

OFFICE	VISITS	COMPLETED VISITS	EVIDENCE ITEMS	APPROVED TIMESHEETS
Optimus Health Cardiff	90	26	66	37

Read the network summary. Operational care records stay within each office.

Built around your care organisation

Optimus Health



Your brand

Set up the customer identity and local office presence.

Company brand and domain

Office website content

Care terminology and settings



Your instance

Give your organisation a dedicated operating environment.

Your offices, data and files

Office-level record isolation

Your integration configuration



Your handover

Put the agreed delivery into the customer's hands.

Source and configuration

Accounts and operating guides

Support agreed for your instance

Optimus Health

Thank you



A product by WeebPal **weebpal**
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