CareFree – Advanced Training

Course Content

Adding working hours

- Specifying a working pattern

Adding & deleting away periods

- Adding an away period to a call
- Adding an away block to clients & carers
- Deleting, amending & editing away periods

Adding Rotational calls

Rota split screen view

- Setting split screen as the default rota view
- Allocating calls in the split screen view

Site type and site rota views

- Creating site calls on the rota

24/7 Live-in functionality

- Adding 24/7 live-in calls
- 24/7 Planner screens

Capacity planner screen

More on the unallocated screen

- Advanced view
- Ticked and informed
- Tracking requests for cover
- Pencil in & auto allocate carers

Linking documents policies and procedures

- Specifying document types / linking to call logs

Workflow

- Creating a workflow
- Attaching the workflows to client and carers
- Tracking workflow progress

The planners screen

Preferences and options

Using the verify screen

- Call status & override status
- Setting options for aborted, penalty & cancelled
- Using appropriate away reason to cancel calls

Using QA for training & assessments

- Creating & editing QA types in items
- Scheduling QA for clients & carers
- Completing scheduled QA items
- Copying QA items across clients & carers

Reports

- Using reports to generate carer rotas
- Other useful reports in CareFree

Using Letters to create mail merges

Duration
1 Day (A full day usually runs from 10am till 4pm, with a break for lunch).

Target Audience
Coordinators, Care Managers and Senior Carers who will be responsible for more than simple rostering and call management/ allocation. The course will demonstrate how CareFree can be used to monitor recruitment, learning and development, assessments, managing exceptions in the delivery of care, tracking absences and generating reports.

Objectives
By the end of the course delegates will be able to:

- Add carer working patterns
- Manage client & carer absences
- Use advanced features to allocate calls
- Use CareFree to track holidays & pay
- Create and monitor checklists (workflow)
- View business information in the planner
- Set preferences & options in CareFree
- Manage where care is not delivered as planned
- Generate reports & letters

Prerequisites
An understanding of how to add, edit and delete client records, create care packages and manage and allocate calls on the rota.