

# CareFree – Essentials Training

## Course Content

### Getting started & logging on

- Selecting your branch/team

### Navigating the system

- Using the menus, buttons and toolbars

### The carer screens

- Adding a carer
- Carer screen tabs

### The items screen

- Making changes to existing items
- Adding new items

### The client screens

- Adding a client
- Client screen tabs
- Using the log

### Contracts

- Adding a new contract using the contract screen
- Adding a new contract using the wizard

### Client and carer preferences

- General settings
- Exclusions

### Popup notes

- Adding, editing and deleting a popup note

### Creating a package of care

- Care package wizard
- Reset, create and close options
- Amending a package of care

### The rota screen

- Managing calls
- Selecting the correct working mode
- Editing call details
- Multiple calls
- Right click options
- Dragging and dropping
- Adding and deleting calls
- Allocating calls
- Matching criteria
- Viewing unallocated calls
- Allocating calls from the unallocated screen
- Unallocating calls
- Runs

### Previewing and printing carer rotas

- Printing direct from the rota
- Printing bulk rotas from reports

### Using CareFree to communicate

- Sending a message

### Adding users to CareFree

- Password management

#### 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 are new to CareFree, who will add, edit and manage Client & Carer details and create, update and output rotas and timesheets.

#### Objectives

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

- Add, edit & delete client and carer details
- Update menu and selections lists using items
- Create packages of care
- Add, amend and delete calls on the rota
- Use a variety of methods to allocate calls

#### Prerequisites

None.