

CareFree – Financials Training

Course content

Setting up pay rates

- Configure bank holidays to pay enhanced rates
- Setting carers to the correct role
- Setting up the rules (Explanation of all seven rules)
- Setting the default hourly rate
- Inputting pay rates
- Ordering of the rules

Setting up charge rates

- Review contracts to make sure they're setup correctly
- Setting up the rules (Recap the seven rules again)
- Setting the default hourly rate
- Inputting charge rate
- Introduction of the tools button for copying
- Ordering of the rules

Verification

- Refresh on the verification process
- Configure the cancellation rules (aborted, penalty and cancelled)

Running the reports

- How to run a wage report using the wage sheet and summary formats
- How to export the data or print
- How to run the invoice report
- Grouping and frequencies

Finalising wages and invoices

- Explain what finalising does
- Show the areas finalised wages and invoices appear

Unfinalising wages and invoices

- How to unfinalise a wage sheet/invoice individually or in bulk

Making payments

- How you can track invoice payments using CareFree

Invoice and wage formats

- Explain how other formats can be used and how to enable them

Additions and adjustments

- Adding expenses to additions and adjustments

Duration

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

Target Audience

Care Managers, Financial Managers, Coordinators who will be responsible for configuring financial rules and generating wages and invoices out of CareFree.

Objectives

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

- Set up the bank holidays
- Configure pay rules
- Configure charge rules
- Verify calls
- Generate wage/ invoice reports
- Finalise and unfinalise wages / invoices
- Create additions and adjustments to wages / invoices

Prerequisites

None.