



# CareFree v5.5.2

## Training Guide



# Contents

This guide will cover functionality changes from CareFree v5.4.13 to v5.5.2.

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# Getting Started

Before reading this guide please note that certain parts of the system have been updated for a new functionality that your company may not have access to. The new functionality in question is called the CareFree Outcomes System (COS) which will manage client outcomes and task management i.e. tasks and medication.

Please note that certain parts of the system will link with the RoadRunner system which your company may also not have access to. If your company does have access to RoadRunner and are interested in the new functionality your RoadRunner may also need updating.

For more information about the new COS functionality or an upgrade for RoadRunner please contact your account manager.

# Medication

## Medication Times

A medication time can now be added to call details and through the package wizard as displayed below.

When a medication time is added to the call CareFree will look at what has been entered in the medication screen for the client. The relevant medications will then show in the carer's RoadRunner. The relevant update for RoadRunner needs to be applied for this to take effect.

### Call Details Screen

Call details for Paul

Start date: 17/07/2018 12:00 Type: Weekly  
End date: 17/07/2018 13:00  
Client: Paul  
Carer: Davis, Laura  
Medication: Prompt  
Medication Time: AM  
Run: (None)  
Contract: Private  
Site: (None)  
 Site call must be allocated  
Override the default role: (None)

When changes are made - apply them to:  
 This week: 16/07/2018  Upto w/e: 29/07/2018  This week & beyond: 31/12/2018 16/07/2018

P1257 Save Cancel

### Package Wizard Screen

Care Package Wizard

Week: 16/07/2018 Monday

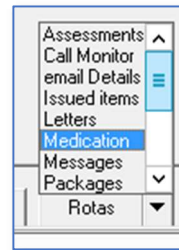
W	T	F	S	S	k2	Times	Spans	Call Type	Contract	Need	Medication	Med Time
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Automatically append the call details to the Package notes  
 Add to the current package  Overwrite the current package

Reset Create Close

## Client's Medication Screen

1. Go to the client's screen
2. Click the Rota drop down
3. Go to **Medication**



 A screenshot of the Medication screen. On the left, there is a list of branches with a 'Name' column and a 'Ref' column. The main area is a table with columns: Medication, Dosage, Time, Other time, Form, Route, Location, Support required, and Hours in between. The table contains several rows of medication data.
 

Medication	Dosage	Time	Other time	Form	Route	Location	Support required	Hours in between
Adalat	apply to area ...	AM		Liquid	Orally		Administer	0
Aspirin		Tea		Blister Pack	Orally			8
Barrier Cream		Tea						0
Dioclyl	apply to area ...	PRN		Cream	Transdermal		Administer	0
E45	apply to area ...	Bed		Cream	Transdermal	Bathroom c...	Administer	0
Ibuprofen		AM						0
Paracetamol	2 tablets ever...	PRN		Blister Pack	Orally		Prompt	4

4. Click the paper icon to add a new medication



 A screenshot of the 'Medication Item' form. It contains several input fields: Medication (Paracetamol), Dosage (2 tablets every 4 hours), Time (AM), Other time (empty), Form (Tablet), Route (Orally), Location (empty), Support Required (Prompt/Assist), Hours in between (0), Notes (empty), Start date (06/08/2018), and End date (31/12/2099). There are 'Save' and 'Cancel' buttons at the bottom.


5. Fill in all the relevant information about the medication then click **Save**
  - a. A new time option has been added called PRN which means the medication is taken when necessary

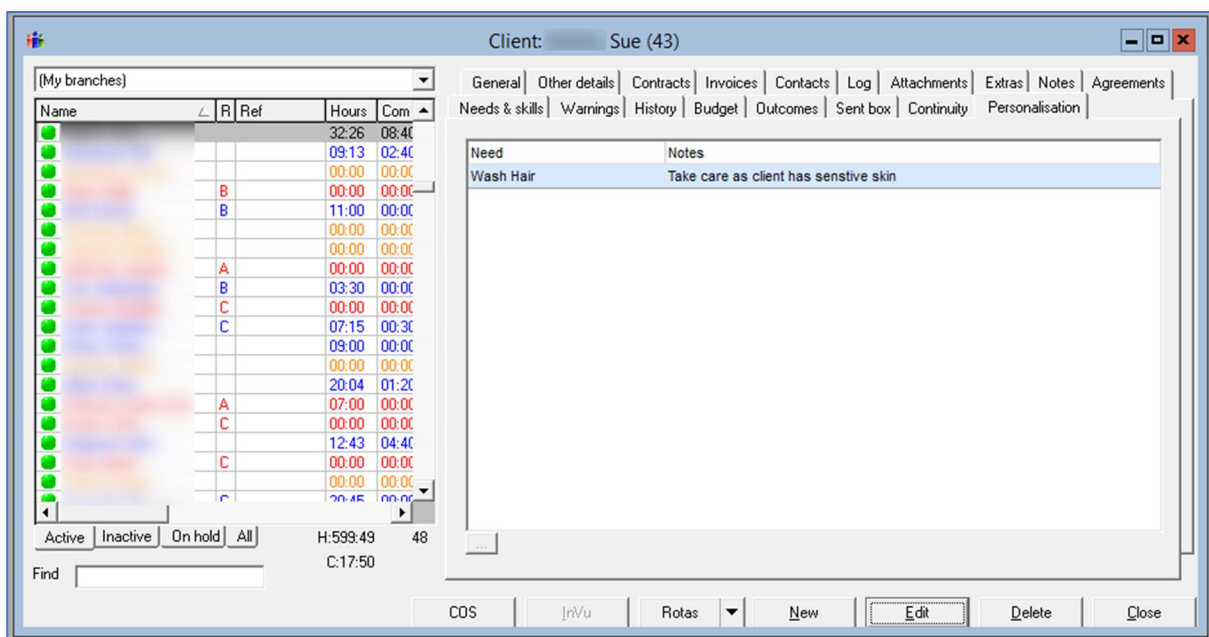
A vulnerability section has also been added to the medications screen. This can be viewed by changing the tabs on the medication screen.



# Outcomes

A new tab has been added to the client's record to store personalised notes for each need a client may have. These are sent to RoadRunner when the call details are viewed. These notes show how the client would like each need or task to be done.

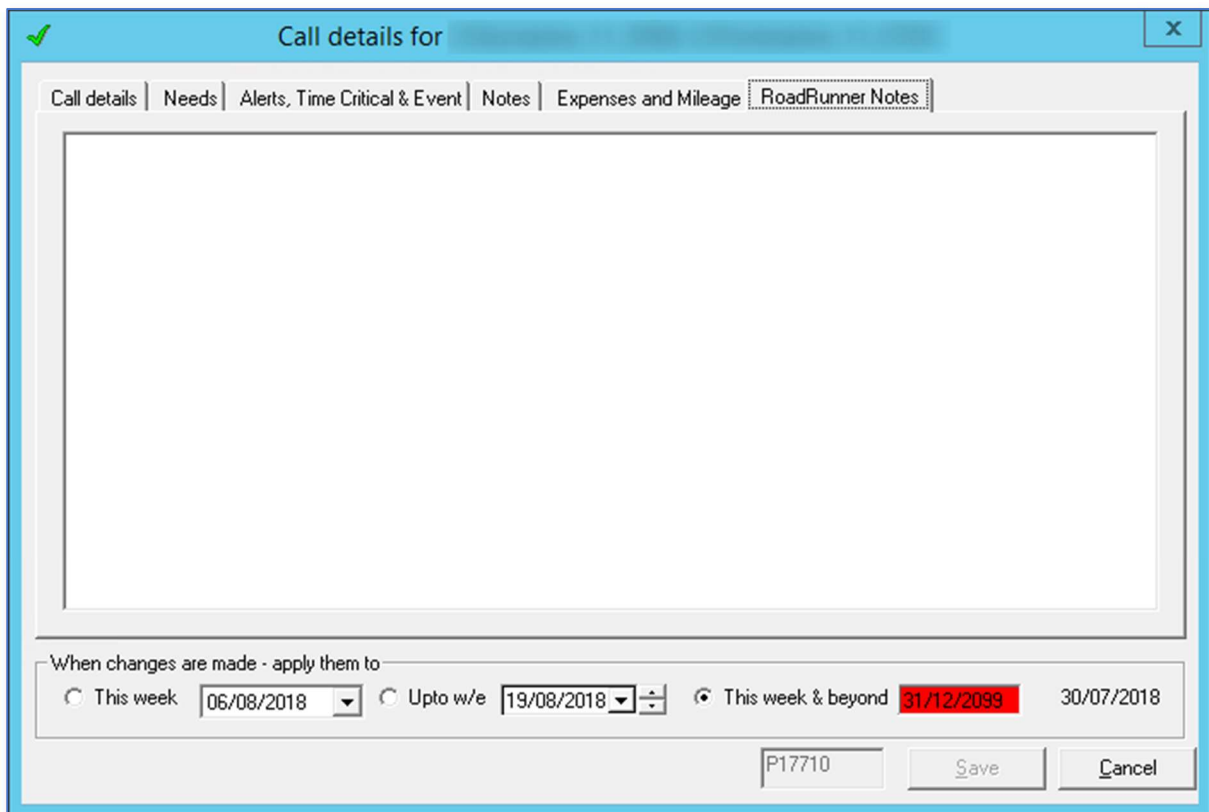
1. Go to the client's screen
2. Click on the **Personalisation** tab
3. Click **Edit**
4. Click the  button at the bottom of the personalisation screen
5. Tick the need where personalisation is required
6. When the need is added into the personalisation tab double click into the notes field next to the need to type in notes against the need
7. Click **OK** to save the changes



Whenever the need is added onto a client's call the personalised free text that has been entered on this screen will come through onto the carer's RoadRunner call details screen.

A read only text box has been added to the call details showing the notes made by a carer when they log out of a visit.

1. Go to the rota
2. Double-click a call
3. Click on the **RoadRunner Notes** tab



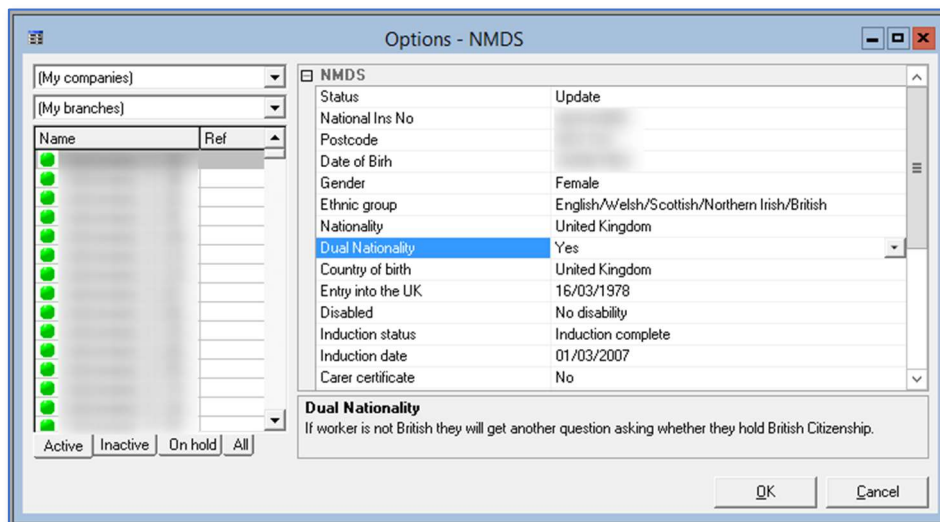
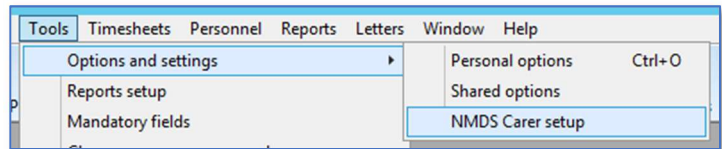
Any notes that have been entered by the carer can be viewed from this tab.

# NMDS

## NMDS Changes

A dual nationality field has been added for carers.

1. Go to **Tools**
2. Go to **Options & Settings**
3. Click **NMDS Carer setup**
4. There is an extra field in the NMDS screen named **Dual Nationality**



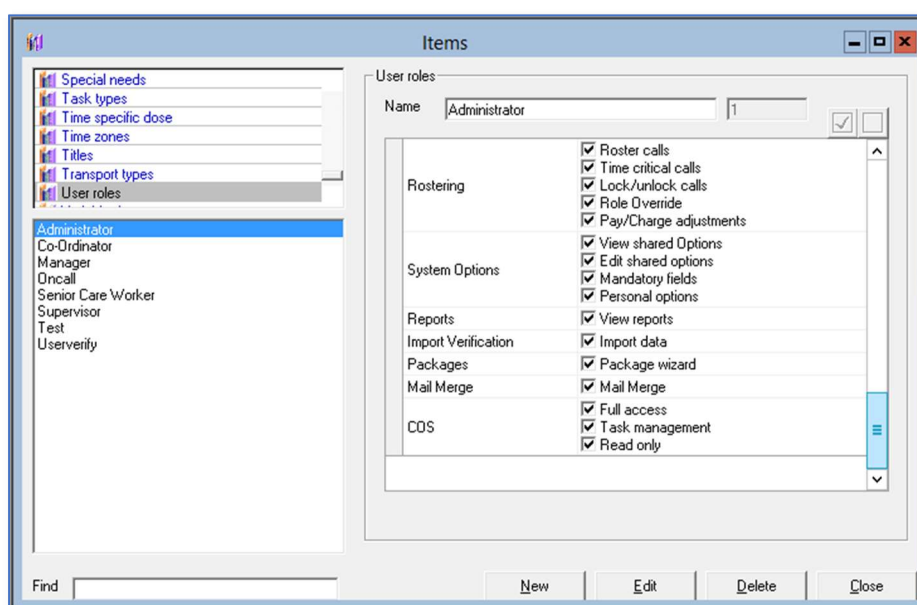
5. This option can be set Not Known, Yes or No



# Items

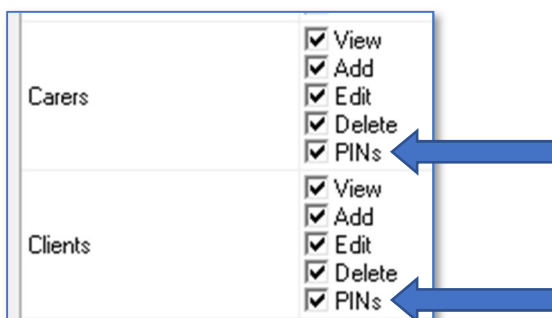
A new section in the user roles restrictions has been added to CareFree for the COS system.

1. Go to **Items**
2. Go to **User Roles**
3. On the right there is a list of restrictions in CareFree, scroll to the bottom to view a COS section



COS stands for CareFree Outcomes System and is a new piece of functionality produced by CareFree. For more information about COS please contact your account manager.

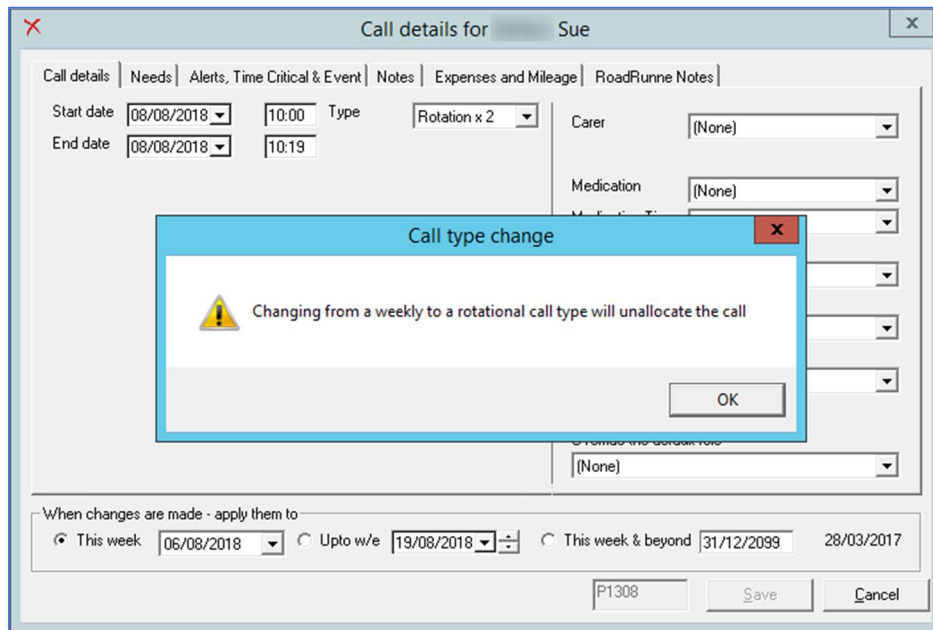
Another restriction that has been added to the user roles is the ability to enable/disable editing of client and carer PINs for ECM.



# Rotas

## Rota Changes

Call types can now be changed a call from weekly to rotational and vice versa. When changing the call type on a call a message will prompt the user that the call will become unallocated.



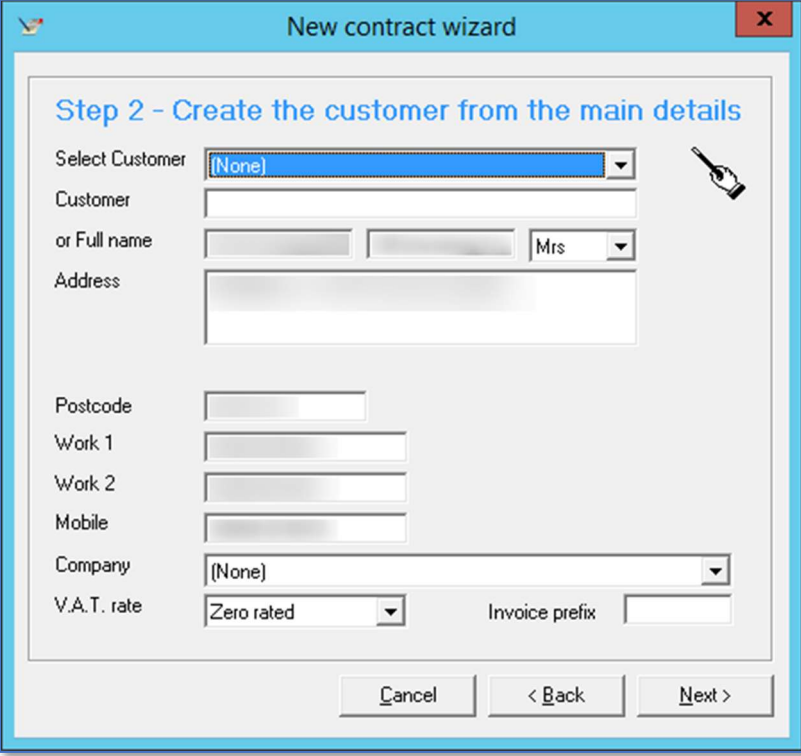
Click **OK** to this message. The call type will have changed and the call will be free to re-allocate. If changing the call to a rotational call further drop-down boxes appear on the call to allocate a carer to each week.

		Copy times	
Week 1	(None)	12:30	13:30
Week 2	(None)	12:30	13:30

# Contracts

An option to choose an existing customer when adding in a contract using the contract wizard screen has been added.

1. Go to the client's screen
2. Go to the contracts tab
3. Click **Edit**
4. Right-click in the contracts screen
5. Click **New Contract**
6. Ensure **Use the wizard to help you** is selected then click **Next**



The screenshot shows a window titled "New contract wizard" with a close button (X) in the top right corner. The main content area is titled "Step 2 - Create the customer from the main details". It contains several input fields and dropdown menus:

- Select Customer:** A dropdown menu currently showing "(None)".
- Customer or Full name:** A text input field.
- Address:** A large text input field.
- Postcode:** A text input field.
- Work 1:** A text input field.
- Work 2:** A text input field.
- Mobile:** A text input field.
- Company:** A dropdown menu currently showing "(None)".
- V.A.T. rate:** A dropdown menu currently showing "Zero rated".
- Invoice prefix:** A text input field.

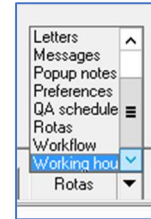
At the bottom of the window, there are three buttons: "Cancel", "< Back", and "Next >". A hand icon is visible on the right side of the form area.

7. Use the **Select Customer** drop-down box at the top of this screen to select an existing customer for the new contract – this will update in the relevant fields below
8. Finish off the contract as normal

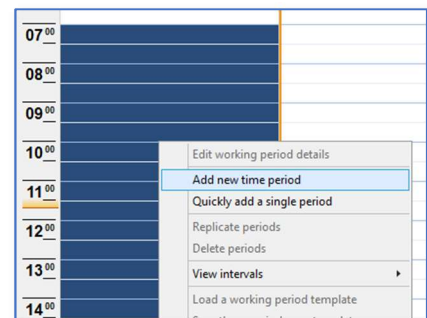
# Working Hours

A new working option has been added to CareFree called **Office Hours**. This is useful when staff members do a mixture of calls and office work.

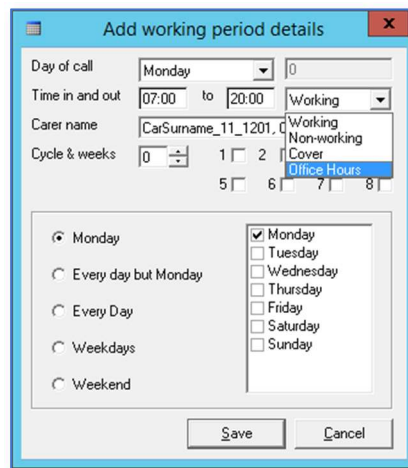
1. To update a carer's working hours, go to the carer's screen and select the carer in question
2. Click the rota drop-down option and click **Working Hours**



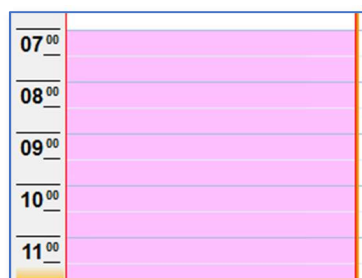
3. Highlight a working/non-working area, right-click and choose **Add new time period**



4. There is now an option to choose **Office Hours** from the working drop-down box



5. When the office hours are entered they will show in pink on the rota



# CareFree Fixes

## QA Schedule Fixes

- QA Schedules – changed overlapping check so it uses the call or QA overlap option depending on the source of the action, for example, adding a QA which overlaps a call will use the QA settings not the call settings (ticket number 96049)
- QA Schedules – stops edit if QA is part of a finalised wage sheet (ticket number 78735)

## Options and Settings Fixes

- Mapping – changed the Eire postcode label from Loc8 to Eircode
- Flavour – added a shared option to set the flavour label of ‘Customer’ (ticket number 61469)
- Email – attempted to add check for cancel button when emailing reports (ticket number 63159)
- Email – added personal option to set the folder for email attachments

## Contact Log Fixes

- Contact Logs – client and carer drop down lists now include inactive people in case the user is editing a log and the linked-to client or carer is no longer active (ticket number 95168)
- Contact Logs – changed lists of clients and carers to include inactive people in case a log for an inactive person is changed and the name is no longer there (ticket number 95168)
- Contact Logs – replaced attachment popup menu with side buttons as popup didn’t work (ticket number 88888)
- Contact Log – added shared option to export a contact log to a custom quality excel form (ticket number 73728)

## Rota Fixes

- Rotas – added check to stop shadowing calls with blank call times being created (ticket number 98629)
- Rotas – disabled away menu if the rota view isn't client or carer (ticket number 82232)
- Package Wizard – disabled overwrite option if user cannot delete calls (ticket number 81626)
- Planner – fixed efficiency planner options which were blank before (ticket number 88106)
- Unallocated Calls – Added double-up column to standard and advanced unallocated views

## Reports Fixes

- Reports – remove unused option to show PINs on unallocated calls reports (ticket number 96350)
- Reports – fixed planned/actual option in the travel & contact time report which wasn't used (ticket number 97617)
- Reports – disabled pay and charge on actuals if user doesn't have access to shared options (ticket number 88689)
- Reports – changed data statistics by carer report to include carers without calls (ticket number 79021)
- Reports – changed packages of care report to use the date parameters
- Reports – changed Salford return to pick up correct provider no from the client's company (ticket number 83893)
- Reports – changed periods drop-downs on date selection tab to use new period setup
- Periods – changed period maintenance to allow for multiple periods with the same dates

## **ECM Fixes**

- RoadRunner – changed shared option to allow up to 31 days of visible rotas (ticket number 79381)
- Call Monitoring – option to link ECM to pay and charge restricted to TMJ & CareFree users (ticket number 81236)

## **Medication Fixes**

- Medication – added audit for medication and VMM changes (ticket number 82839)

## **NMDS Fixes**

- NMDS – changed worker export to populate ZeroHrCont column if arrangements has 09 (ticket number 86801)
- NMDS – changed training export to exclude expired training (ticket number 86801)
- NMDS – fixed bug where employment status ID was exported instead of the code (ticket number 89457)
- NMDS – includes changes to organisation and worked files (ticket number 90593)

## Other Fixes

- Database – merged split tables and recreated indexes for performance gains
- Carers – added new pay period dropdown for the Select export
- Carers – disabled carer type dropdown if show staff option is not switched on (ticket number 82117)
- Customers & Contracts – fixed performance issues when loading up the screens (ticket number 81775)
- Assessments – boxes for tasks and notes resize evenly on the screen (ticket number 79501)
- Exports – changed invoice export to include credit notes (ticket number 94702)
- Verification – fixed performance issues when changing the status of multi-selected calls
- Unallocated Calls – made some changes for performance issues in the advanced view (ticket number 81592)
- Mail Merge – fixed issue with mail merge handing on customers and contacts (ticket number 82132)