CareFree Webinar – Hints & Tips

Webinar Content

Duration: 1 hour

Section 1 – Mail Merging

- Changing the Source for the Mail Merge
- Exporting a Mail Merge Template
- Creating a Letter Template
- Creating the Mail Merge
- Creating Labels
- Creating Envelopes

Section 2 – Advanced Client/Carer Setup

- Setting up Issued Items for Clients and/or Carers
- Creating Pop-Up Notes
- Prioritising Clients by using Contingency Scores

Section 3 – Personal Options

- Showing the Reports Toolbar
- Showing the Daily Log on Start-up
- Highlight Client Name When They Have Unallocated Calls
- Calculating the Distance Between Calls
- Red Borders for This Week and Beyond
- Using the Rota Split Screen as the Default
- Changing the Column Headers in a Clients Record
- Changing the Column Headers in a Carers Record
- Adding Telephone Number to Popup Notes
- Setting up Emailing from CareFree
- Applying the Tooltip and Configuring What You Would Like to See

Section 4 – Miscellaneous

- Understanding the Audit Trail
- Show Call Trace from the Rota
- Paying by Carers by Shift
- Printing and Emailing Rotas
- Management Summary Screen
- Splitting Carers and Staff
- Quick Search
- Daily Log
- Maps with Pushpins

Section 5 – Questions & Answers