RoadRunner Transactions Portal

User Guide

Table of Contents
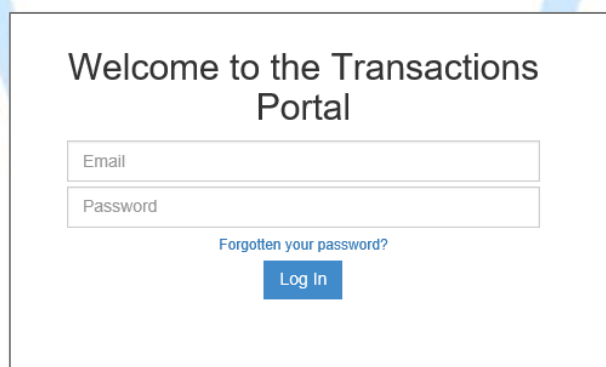
Introduction

The CareFree Transactions Portal is designed to help you manage the RoadRunner application which operates on your company's devices. It can be used to track carer log ins with clients while also having the ability to update and customise the information carers can view in the mobile phone application.

Accessing the Portal

To access the portal, open a web browser and enter http://rrtransactions.carefree-app.co.uk as the address. You will be taken to the login screen which will look like the screen below.
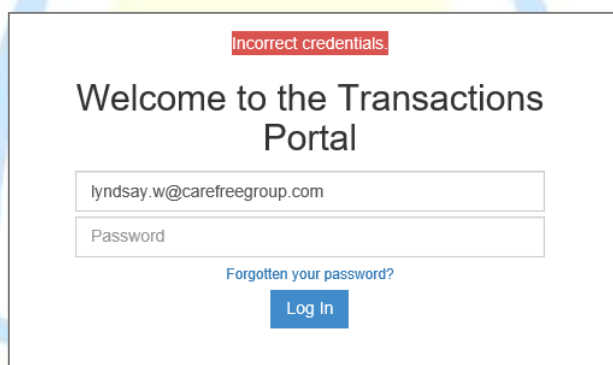
To access the portal, you will need to be a registered user and must enter your email address and matching password.

If this is the first time you are attempting to access the portal, you will have been assigned an administrator log in. If you have not been given these details, support will provide one for you.

Should you forget your password, you may reset it at any time by clicking 'Forgotten your password?'.

The screen will show the warning 'Incorrect credentials' if you have entered an incorrect email/password combination.

User Types & Permissions

There are two types of user in the RoadRunner Transactions Portal and their permissions differ.

Standard User

Standard users can perform the following functions:

- View transactions

Administrator

Administrator can perform the following functions:

- View transactions
- Configure RoadRunner (via company options)
- Remotely update carer phones with new RoadRunner company options and phone numbers
- Manage users or add new users to the Transactions portal itself
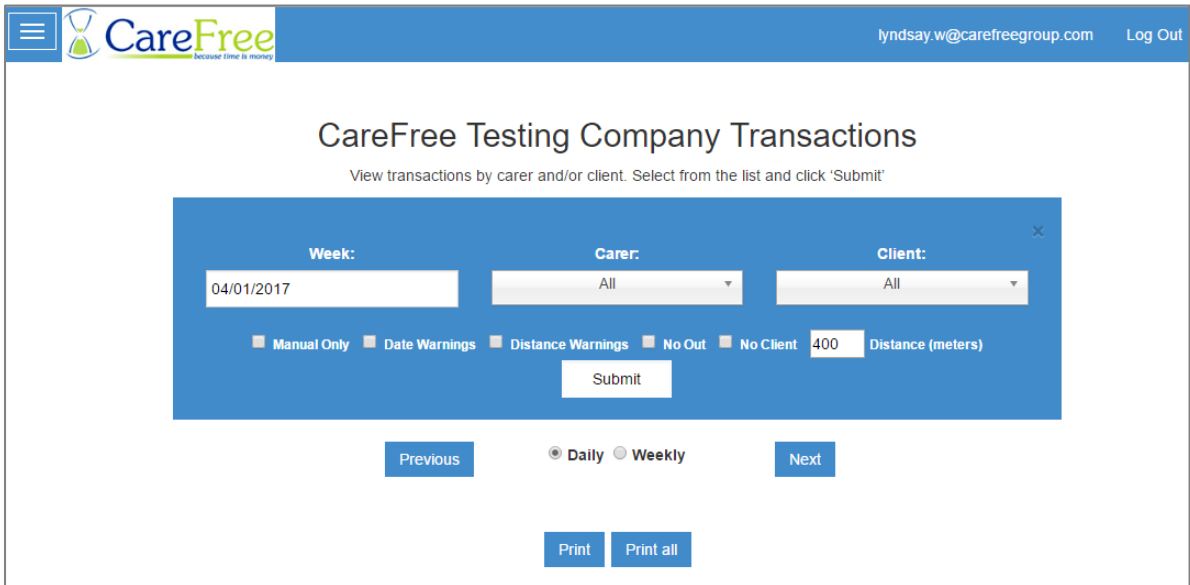
Transaction portal user permissions are summarised below.

Permissions	User	Admin
Add Users		
Add Admin		
Manage Users		
Manage Admin		
Delete Users		
Delete Admin		
View Transactions		
View Company Options		
Edit Company Options		
Push Company Options		
View Phone Numbers		
Edit Phone Numbers		
Push Phone Numbers		
Switch company within group		

(User Groups — User column red except View Transactions which is green; Admin column all green)

Important – All users will automatically be logged out of the portal after 10 minutes of inactivity. This may result in the loss of any changes that are unsaved.

Portal Layout

Both standard users and administrators will receive the following portal transactions screen.

It is possible to customise this screen with your own company logo in the top right hand corner.

The current users' email address will be displayed at the top of the screen and your own company name will be displayed instead of 'CareFree Testing' towards the centre of the page.

A log out button is always provided at the top of any screen within the portal.

Important – Layout may appear different depending on your screen size; particularly if you are viewing on a mobile device. The log out button can be found in the side menu on mobile devices.

Using the Portal – Transactions

Both standard users and administrators have access to the transactions page, which displays the times and durations for individual carer visits at client locations, as well as summary data for a full week.

Viewing Transaction Data

Search Filters

A date filter can be applied when searching through transactions. Click into the 'Week' box and select a date.

Transaction data can be filtered further by using the drop down menus to pick an individual carer or client. If you would like to view all transactions make the 'Carer' and 'Client' drop down boxes and set to 'All'.

The 'Previous' and 'Next' buttons can be used to move forward or backwards by one week.

The transaction data can be displayed in a daily view or a weekly view.
The weekly view will show data from the Monday to Sunday of the week selected e.g. if I select the 4th January this will display the 2nd January to the 8th January.

| ☐ Manual Only | ☐ Date Warnings | ☐ Distance Warnings | ☐ No Out | ☐ No Client | 400 | Distance (meters) |

- The 'Manual Only' filter will only show transactions where a carer has logged out manually.

- The 'Date Warning' filter will only show transactions where a date warning has been issued. This will indicate when the carers handset date/time stamps are different to the server. *The time tolerance, e.g. 10 minutes' difference, can be changed on the Company Options page. If the time the carer scanned the out transaction is more than the tolerance allows then a warning will show. A link is provided so that a user of the portal can view the times recorded for those transactions.*

- The 'Distance Warnings' filter will only show transactions where a distance warning has been issued. This will indicate if the distance between the logged in location and the logged out location is over the limited entered in the 'Distance (meters)' box. *This feature relies on GPS co-ordinates generated by Road Runner, and accuracy will vary between mobile devices.*

- The 'No Out' filter will only show transactions where the carer has not logged out.

- The 'No Client' filter will only show transactions where there is no client is listed in the transaction.

The Transaction Summary Table

When the transaction data is displayed a summary table appears above the individual transactions.

Carer	Client	Total Scans	Completed Visits	Total Time	Manual	% Manual	Distance Warnings	Date Warnings
All	All	2329	1164 of 1165	24:06:01:03	294	25.26%	109	5

If a large amount of data has been selected, the full results may be sorted into several pages but the summary table always includes the data in all the pages.

- The 'Carer' column shows the carer you have selected if one has been selected. If not, the column will show as 'All'.

- The 'Client' column shows the client you have selected if one has been selected. If not, the column will show as 'All'.

- The 'Total Scans' column shows the total number of scans made.
  A scan is when a carer logs in or logs out using their RoadRunner handset. A scan can be made using either a QR code or an NFC tag

- The 'Completed Visits' column shows the number of completed visits. A completed visit represents the amount of times a carer correctly has logged in **and** logged out of a call.
  In some cases a carer may have logged in but has forgot to log out. '3 of 3' completed visits represents 3 calls correctly managed by RoadRunner. Should a carer forget to log out '2 of 3' would displayed

- The 'Total Time' column shows the duration of all the completed calls for the data selected.

- The 'Manual' column shows the number of completed calls where a carer has manually logged out.
  It is possible to prevent carers from completing manual log out by setting company options in RoadRunner. Company options will be covered later in this guide.

- The '% Manual' column shows the percentage of completed calls where a carer has manually logged out.

- The 'Distance Warnings' column indicates any calls which have the distance between the logged in location and the logged out location over the limited entered in the 'Distance (meters)' box.

- The 'Date Warnings' column indicates when the date and/or time has been altered or on the carers handset. The screenshot below is an example of how the date warning will appear in the transactions list.

| IN | 04/01/2016 06:47:07 | M | 04/01/2016 07:17:27 | 00:30:20 | Warning | | Complete | View |
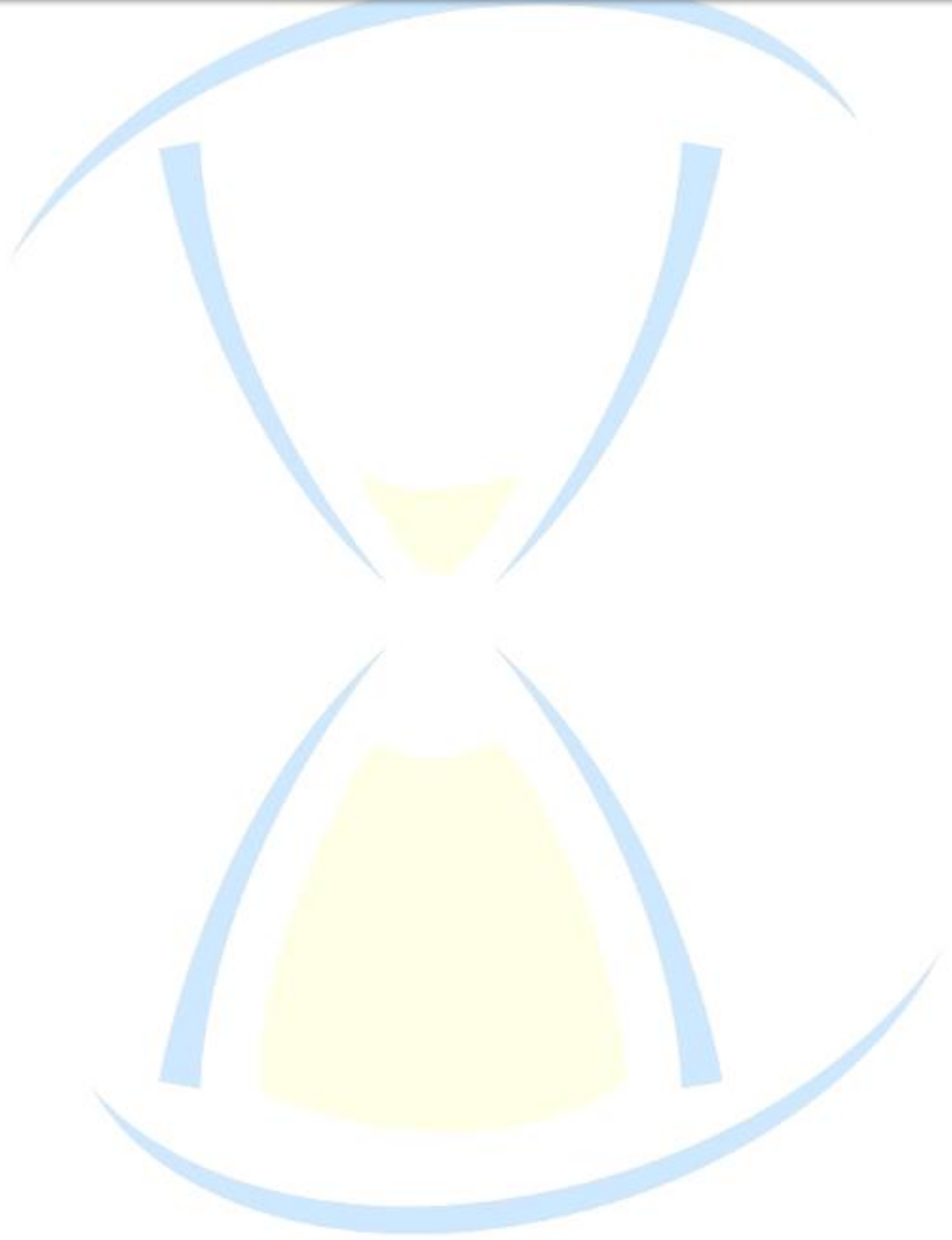
The Transactions Table

The Transactions Table gives a full breakdown of information for every transaction. The points below describe what each column indicates.
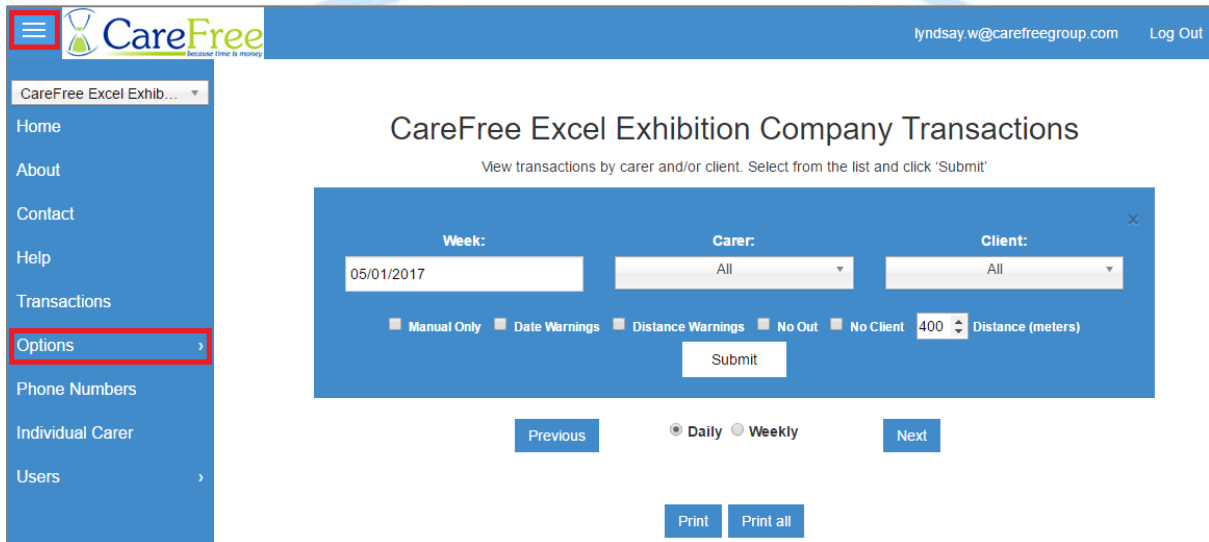
Carer	Client	Logged In	Logged Out	Duration	Distance	Dates/Times	Sent To CareFree	View
Sandra Smith	Walter Fearnley	IN 04/01/2016 05:52:46	OUT 04/01/2016 06:38:10	00:45:24	N/A		Complete	View
Leah Wood	Patricia Battersby	IN 04/01/2016 05:54:53	OUT 04/01/2016 07:02:05	01:07:12	N/A		Complete	View
Maureen Evans	Patricia Battersby	IN 04/01/2016 05:56:13	OUT 04/01/2016 07:03:35	01:07:22	N/A		Complete	View
Patricia Chance	Margaret Streeton	IN 04/01/2016 05:57:55	OUT 04/01/2016 06:57:54	00:59:59	N/A		Complete	View
Jean Prescott	Thomas Parry	IN 04/01/2016 05:58:51	OUT 04/01/2016 06:15:29	00:16:38	N/A		Complete	View

- The 'Carer' column shows the name of the carer who completed the transaction.

- The 'Client' shows the name of the client for whom the transaction was completed.

- 'IN' – shows that the carer has logged in using an NFC tag or QR code.
  If GPS logging is enabled the word 'IN' will be hyperlinked. Clicking on the link will open Google Maps and display where the carer logged in.

- The 'Logged In' column displays the date and time that the carer logged in.

- 'OUT' – shows that the carer has logged out using an NFC tag or QR code. If an 'M' is displayed this means the carer has manually logged out.
  If GPS logging is enabled the 'OUT' or 'M' will be hyperlinked to display where the carer logged out. Clicking on the link will open Google Maps and display where the carer logged out.

- The 'Logged Out' column displays the date and time when the carer logged out.

- The 'Duration' column shows the time difference between log in and log out i.e. the length of the call.

- The 'Distance' column shows the distance between the log in and log out locations if GPS has been recorded for both. By clicking 'Map' this will show the travel distance on google maps.

- The 'Dates/Times' column will show if there is a date warning.

- The 'Sent to CareFree' column will show if the logged in and logged out has been sent to CareFree.
  If this shows 'Complete' it means the carer has logged in and logged out. This may show 'IN sent' which means the Carer has logged in but has not yet logged out.

- View will show more detail about the transaction.

Using the Portal

Options

Click on the box in the top left hand side to load the navigation of the transaction portal and click options.
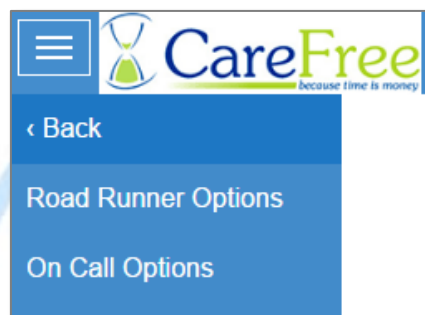
In 'Options' there are 2 options to choose from – 'RoadRunner Options' and 'On Call Options'.

Once you have amended your options you can push them out to all your carer's handsets.

RoadRunner Options

| Option Name	Description
Tag Touch Interval	If switched on this is the number of minutes from when the carer has logged in to when they can log out of a call.
Save Password	Allows passwords to be saved on all carers handsets.
Allow Change User	Allows carers who are logged into RoadRunner to be changed without having to reinstall the app.
Display Rota Details	Allows rota details is be viewed on RoadRunner.
Display Client Phone Number	Displays the client's phone number in the rota.
Display Client Keysafe	Displays the client's keysafe number in the rota.
Display Double-up Carer	Displays if there it is a double-up call and who the double-up carer is.
Display Contacts	Displays the contact names for the client in the rota i.e. Next of kin, GPs.
Display Call Notes	Displays the call notes for the call in the rota.
Display Meds	Displays the client's medication in the rota.
Rota Logout Time	Returns the carer to the menu screen if no activity after a set time. This time is measured in seconds.
Display Actual Times	Displays actual times instead of scheduled times.
Allow Manual Signout	Allows carers to manually log out without using a QR code or NFC tag.
Actual Time Tolerance	Allowance of time difference between the phone and the server. If the difference is greater than the value a date warning is issued. This time is measured in minutes.
Show Directions	Allows carers to see directions to the client's house.
Carer Messaging	Allows carers to message the office.
Display General Notes	Displays general notes in the rota. *Please note this could use a lot more data allowance.*
Display Entry Method	Displays entry method notes in the rota on how to access the client's property for a call.
Prompt for Driver	Prompt carer to answer whether they are the driver or not.
Display Carer Hours	Displays carers weekly hours on the rota.
Display Contact Numbers	Displays the client's contact telephone numbers in the rota i.e. Next of kin, GPs.

Rota Format	Displays whether the carers see the calls with a start time and the number of minutes the call takes or have a start time and a finish time.
Send Log	Allows the ability to send call notes into the daily log to be turned off, entered from the 'Purpose of Call' screen or prompted for when logging out.
Show DOB	Displays client's date of birth.
Send Log Message	Displays what text is shown when the carer is prompted for call notes.
Play Sound with Message	Allows a sound to be played when a message is received on a carers handset.
Allow Manual Sign out Button	Shows a manual sign out button on the roadrunner menu.
Show Call Timer	Displays a call timer when logged into a call.
Show Call Duration on Logout	Displays call duration when logging out of the call.
Lone Worker Mobile 1&2	When the volume button is held down on carer's handset this will send a text message to the Lone Worker mobile numbers with the GPS location of the handset.
Lone Worker Call Number	When the volume button is held down on carer's handset this will call the Lone Worker call number.
Lone Worker Email Address	When the volume button is held down on carer's handset this will email the Lone Worker email address with the GPS location of the handset.
Show Unallocated Calls	Displays unallocated calls.
Carer Can Request Leave	Allows the carer to request leave from RoadRunner.
Show Planned vs Actual as Percentage	Shows an indicator on each call with a percentage on the planned vs actual time of the call.

NOTE: some of these options may not be available for your company.

If any of the options are amended there are 2 buttons to choose from.
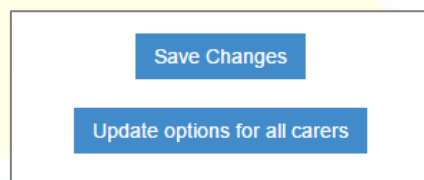
- 'Save Changes' will save the changes on the transaction portal but this does not change the settings on the carer's handsets.

- 'Update options to all carers' will save the changes and push all the options to the carer's handsets.

Phone Numbers

It is possible to enter a directory of contact numbers which can be accessed by the carers within the RoadRunner application.

Click on the 'Phone Numbers' option in the navigation menu.

Adding, Editing and Deleting Phone Numbers

The first column displays the name of the phone contact and the second column shows the phone number.

- To add a new phone number, add the contact name and telephone number into the two text boxes at the bottom of the phone numbers list then click 'Add'.

- To amend a contact, click the 'Edit' button next to the contact.

Loneworker	07904 065636	Update	Delete	Cancel

- To update the contact name or telephone number change the text in the appropriate field and click 'Update'.

- To delete a contact, click 'Delete' – a prompt will then ask if you are sure, click 'OK'.

- To update phones numbers on all carers handsets, click 'Update phone numbers for all carers'.

When the phone numbers table is empty a note at the top of the screen will display 'There are no phone numbers to show'. You can begin adding numbers to the directory by completing the text boxes and clicking the 'Add' button.

There are no phone numbers to show.

Name

Number

Add

Update phone numbers for all carers

Individual Carer

Click on the 'Individual Carer' option in the navigation menu.

This page is designed to allow you to update an individual carer with amended options or phone numbers.

IMPORTANT – This feature is not designed to allow you to update individual carers with different settings, it is designed to RESEND the SAME companywide options and phone numbers to an individual carer.

Updating an Individual Carer

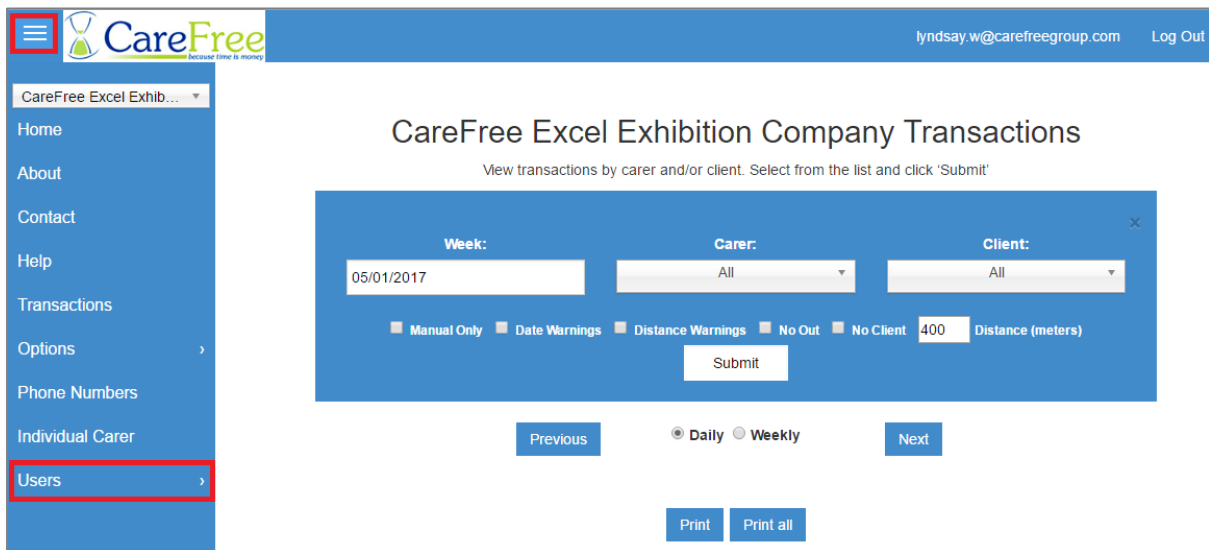- Select a carer from the drop-down list

- Once a carer is selected, you may either update their Company options, or their phone numbers (or both) by clicking the appropriate update button

When RoadRunner receives the update a notification will appear that will look similar the screenshot below.
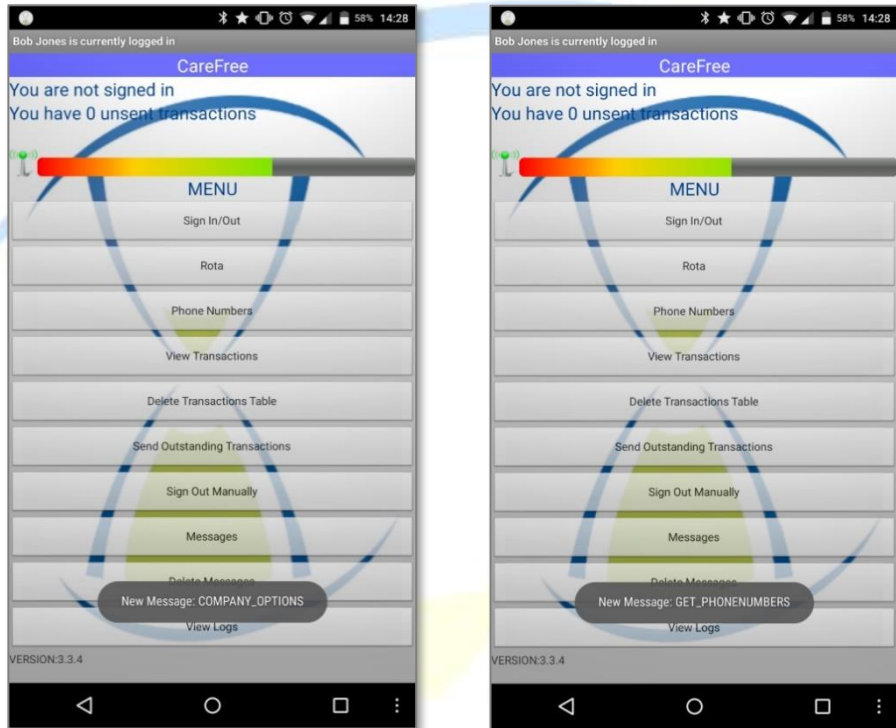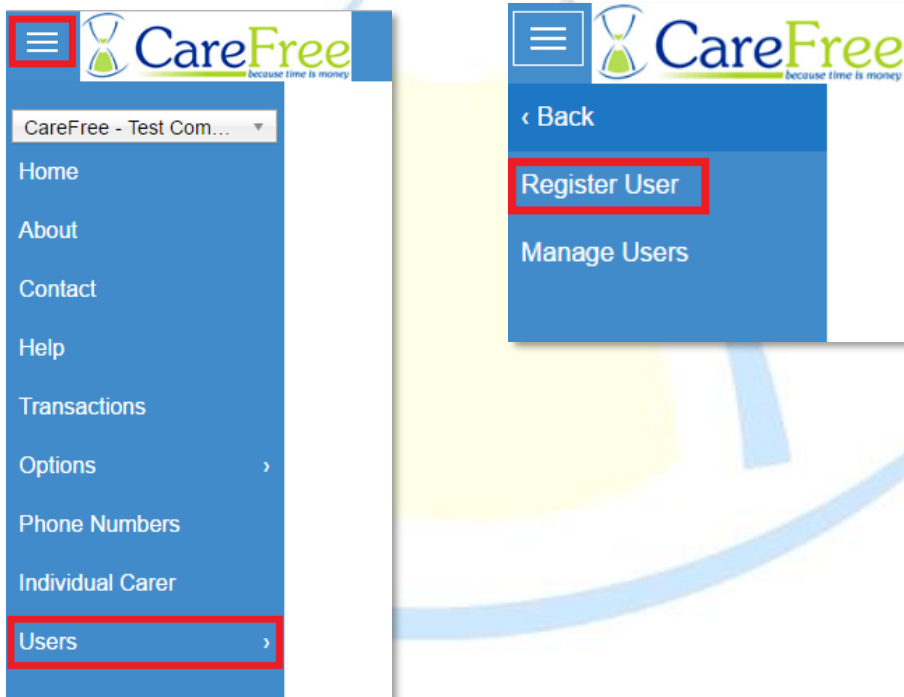
Users

Click on the 'Users' option in the navigation menu.

There are 2 options available in the 'Users' section – 'Register User' and 'Manage User'. The next 2 sections of this guide will explain both.

Register a User

- Click on the 'Users' option in the navigation menu then click 'Register User'.

- Enter an email address, password, confirm the password, and select a user type.
  *You **must** enter an email address that is currently in use or you may struggle to reset your password later.*

Register a new user for the Portal

Email: [   ]

Password: [   ]

Confirm Password: [   ]

User Type: [User ▾]

Forgotten your password?

[Submit]

- If you have forgotten the password to your account, or another account you can request reset instructions by clicking the forgotten password link below the form

- There are 2 user types that can be selected, User and Administrator.
  Standard users cannot register new users of the portal.

- Once all fields have been completed click the 'Submit' button.

- If the user registration is successful, the portal will notify this with a 'Successful' message.

Successful

Register a new user for the Portal

Email: [kayleigh.b@carefreegroup.]

- If the user already exists, or the submission is unsuccessful for any reason, a message will display in the same location with the result of the form submission.
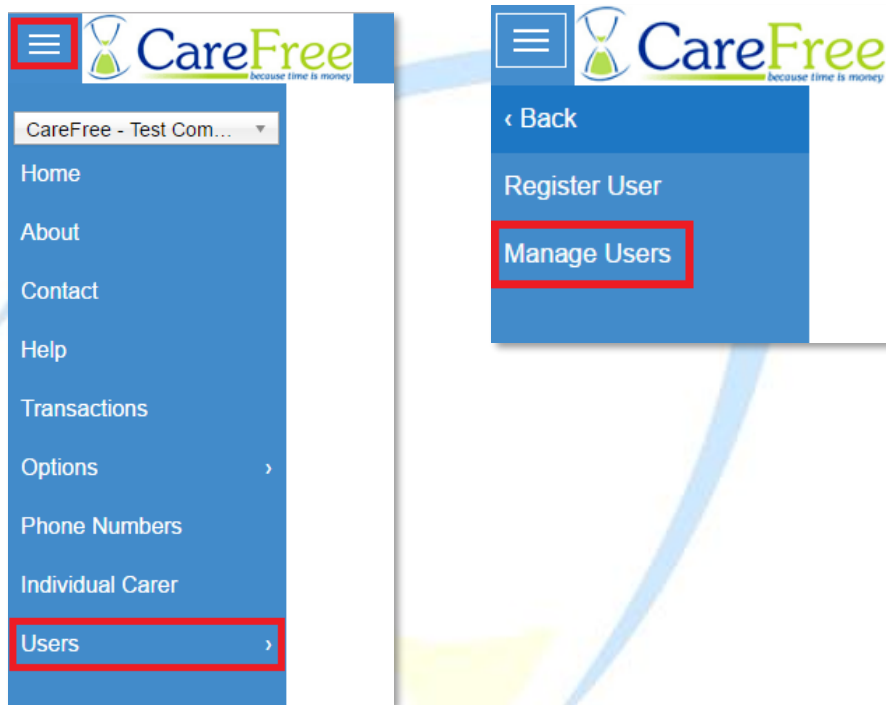
A User already exists for that email address

Register a new user for the Portal

Email: [kayleigh.b@carefreegroup.]

- Click on the 'Users' option in the navigation menu then click 'Manage Users'.

- This page allows Administrators to manage users of the portal.

- Use the 'User' drop down list to select the user you wish to edit.

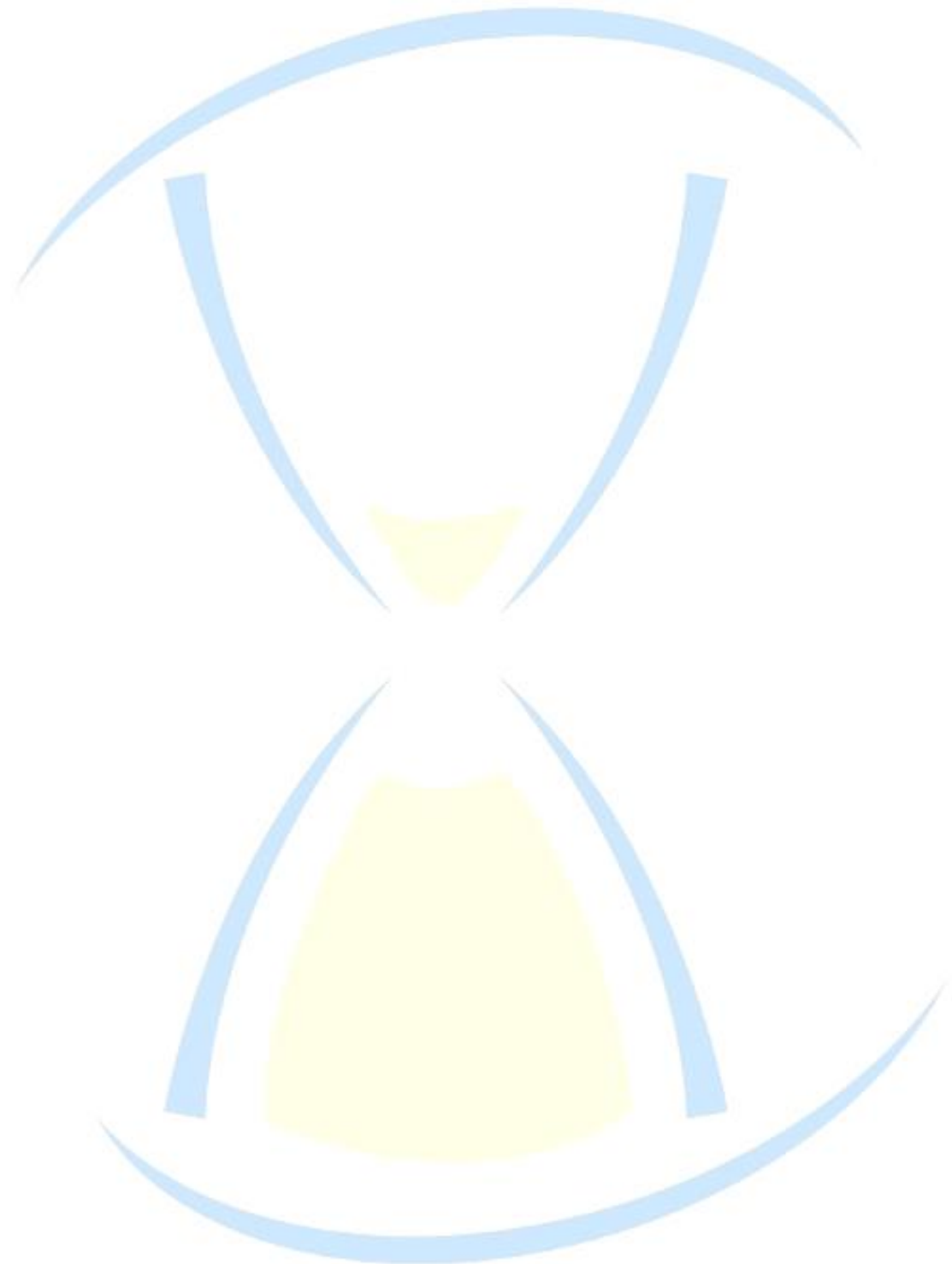- You can select to change either the password and/or the user type.
  Should you wish to only change the user type or delete the user, you may leave the password fields blank.

- When changes have been made click the 'Submit' button.

- If the portal user needs deleting click the 'Delete' button.

Password Recovery and Reset

- You can reset your own password by clicking 'Forgotten your password?' on the portal log in screen.

Welcome to the Transactions Portal

Email

Password

Forgotten your password?

Log In
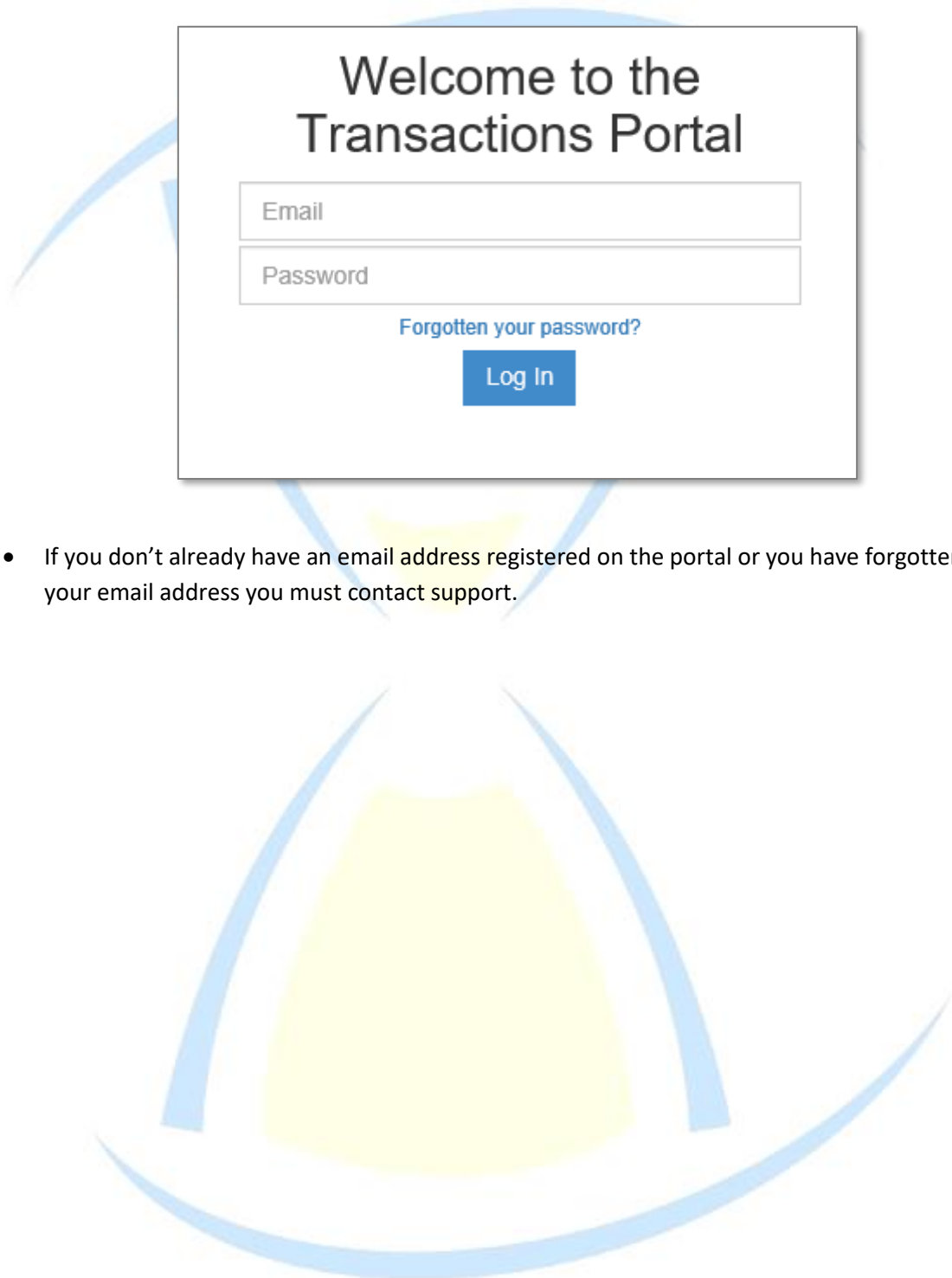
- If you don't already have an email address registered on the portal or you have forgotten your email address you must contact support.

Portal Navigation Bar & Help

This section covers the other options available in the navigation menu.

Company Logo & Home Button

Clicking on either the company logo or the 'Home' button within the navigation bar will take you either to the log in page (if not logged in) or the transactions page (if logged in).
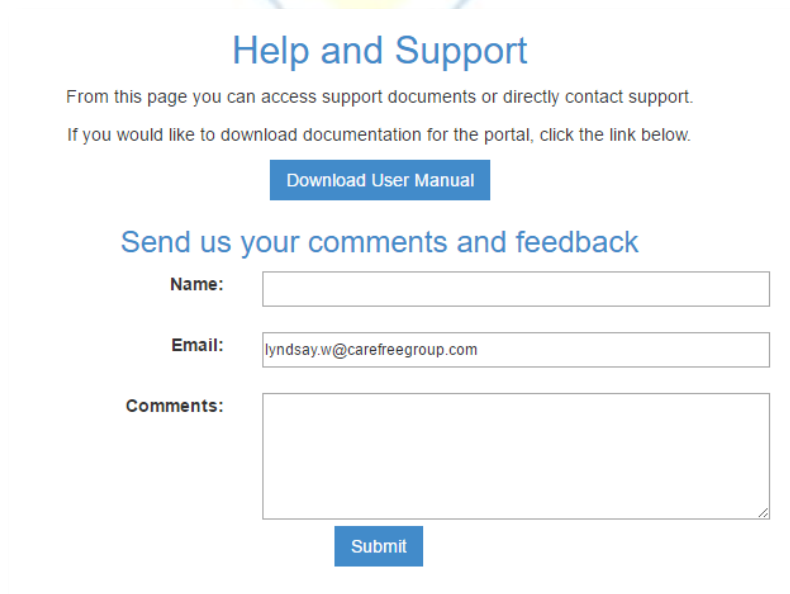
About

This option takes you to the 'About' page which tells you about the transaction portal and CareFree.

Contact

Takes you to the Contact screen to view the CareFree office phone number and support email address.

Help

This options takes you the help page where you can download the latest version of this user guide or fill out a support form to contact our team.

Log out

This option will log you out of the portal.

Troubleshooting

Should you run into any issue with the portal that you cannot seem to resolve, a 'reset' approach may fix the issue. Logging out and then back into the Portal should refresh the data and resolve your issue. If for whatever reason, you cannot log out of the Portal, loading the Error page manually will reset the Portal and Log you out. Click on the following link to complete this process: http://rrtransactions.carefree-app.co.uk/LogOut.aspx

If neither of these methods resolve your issue, please use the feedback form on the Help page (if accessible) or contact support at: support@carefreegroup.com.

Setting a Company Logo

If you would like to set up a company logo please contact support at support@carefreegroup.com