

# **Task Management Portal Training Guide**



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# Introduction to the Task Management Portal

This Training Guide will explain how use the CareFree Portal from a Task Management account.

The Task Management Portal can be used to:

- View Task Notifications
- View Medication Notifications
- Action Task and Medication Notifications
- Viewing Visits
- Editing Task Status
- Edit Medication Status
- Adding Call Notes
- Creating New Tasks

The main purpose of the Task Management Portal is for office staff to complete Tasks, Call Notes and Medications for Carers who are unable to.

## Logging into the Task Management Portal

1. Open the link to access the Portal

The Portal can be accessed via a computer/laptop desktop, tablet or mobile phone. The screenshots in this guide are taken from a computer desktop. If viewing the Portal via a tablet or mobile phone the screens will differ slightly

2. Credentials will have been provided by CareFree – enter those credentials in the **Email Address** and **Password** fields

A screenshot of the CareFree login portal. At the top is the CareFree logo, which consists of a green hourglass icon and the text "CareFree" in blue and green, with the tagline "because time is money" in smaller green text below it. Below the logo are two input fields. The first is labeled "Email address \*" and contains the email address "lyndsay.w@carefreegroup.com". The second is labeled "Password \*" and contains a series of dots representing a masked password. Below the input fields is a green "Login" button and a white "Forgotten Password" button.

3. Click **Login**

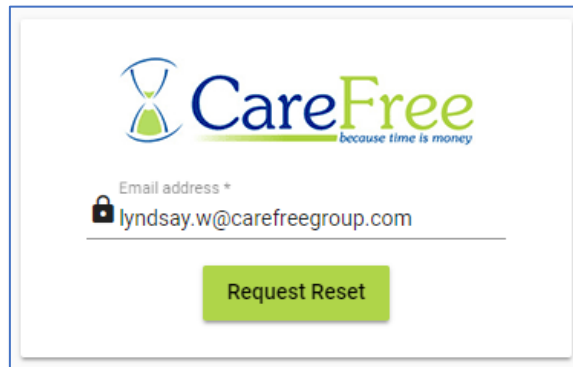
When logging in for the first time most browsers will ask if you want to save the credentials. Please ensure the device where the credentials are saved is not shared by other users

## Forgotten Password

Passwords can be reset from the Login screen by clicking **Forgotten Password**.

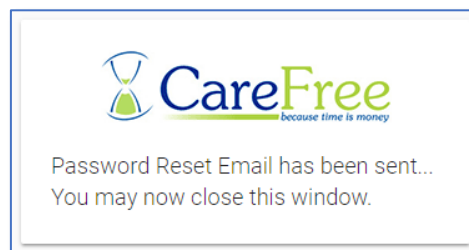
Forgotten Password

1. Enter the email address which is used to log in with

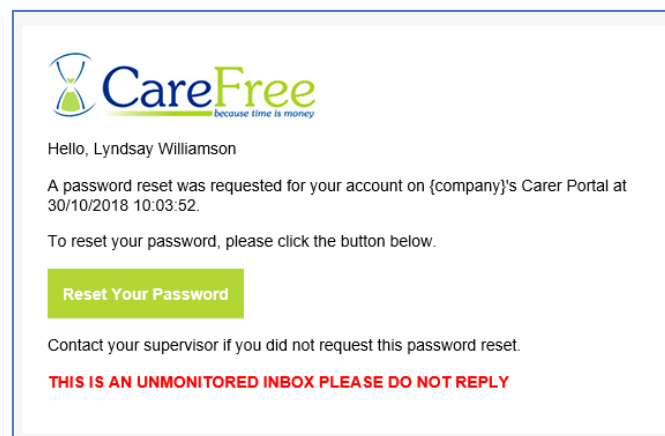


The screenshot shows the CareFree login interface. At the top is the CareFree logo with the tagline "because time is money". Below the logo is a text input field labeled "Email address \*" containing the email "lyndsay.w@carefreegroup.com". A green "Request Reset" button is positioned below the input field.

2. Click **Request Reset** – an email will be sent to the email address entered



3. The email will look something similar to the email below

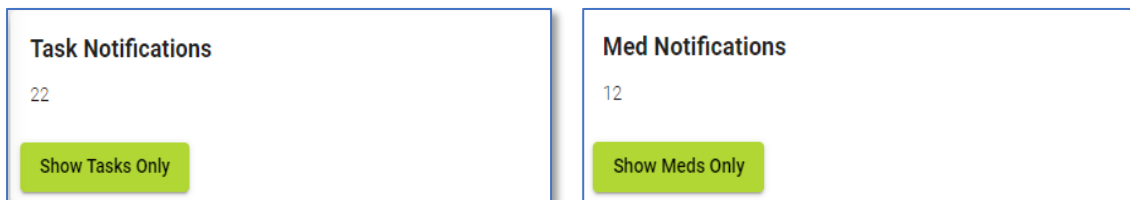


4. Click **Reset Your Password** to enter a new password

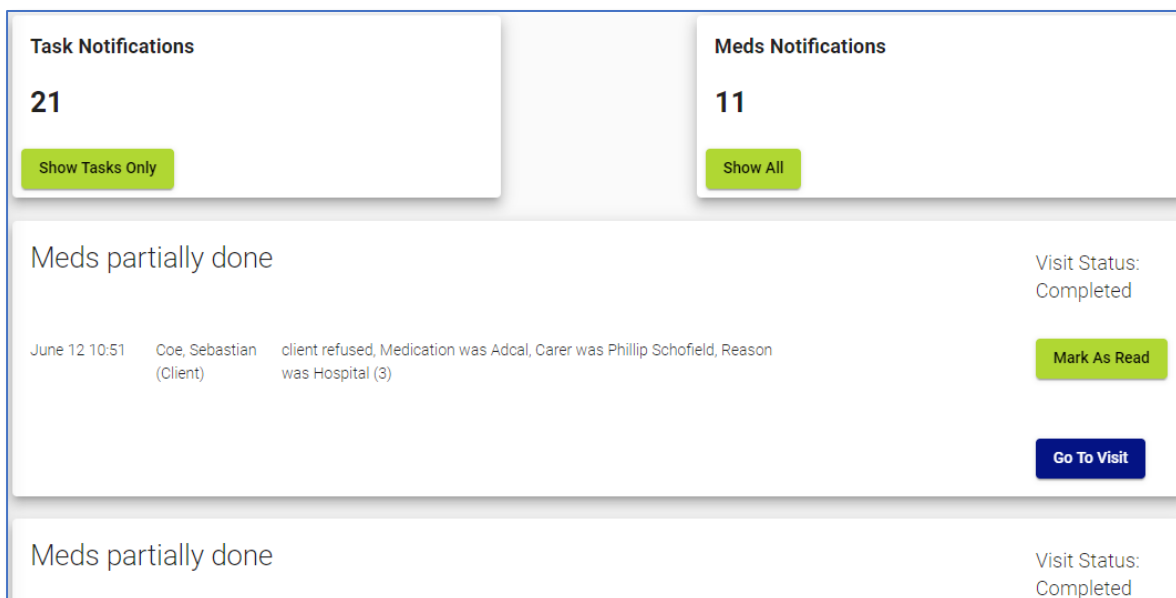
# Home Screen Overview

The left of the home screen will display a navigation bar, which the next few sections of this training guide will explain. It will also display Task and Medication notifications. Along with the ability to mark them as read and view the visit details to add call notes or update the Task status.

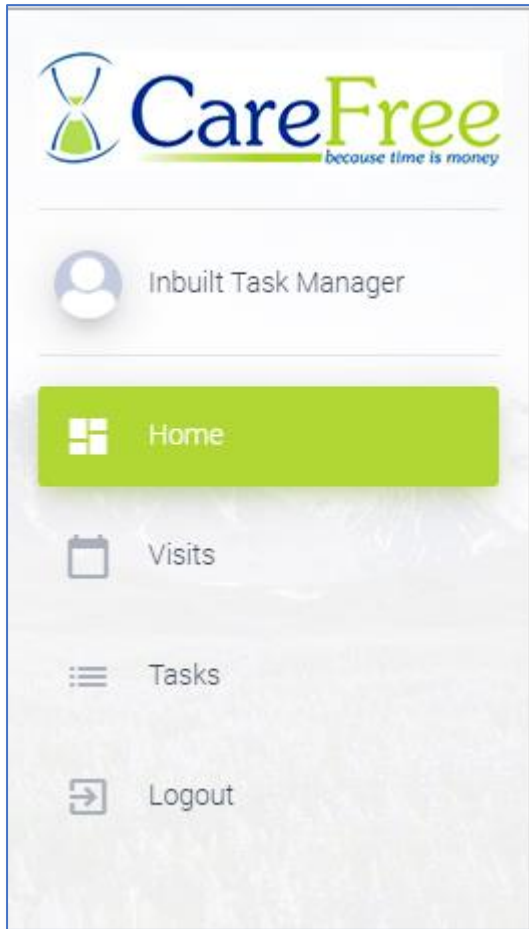
The Task Notifications/ Meds Notifications enable you to filter to show only partially completed/ Not completed Tasks or partially completed/ Not completed Medications. Press on **Show Tasks Only** or **Show Meds Only** to filter the list.



Once the Tasks/ Meds have been filtered use the **Show All** to display the full notification list.



## Menu Options



- **Home** – will direct you back to the Portal home page
- **Visits** – will allow you to view all a list of Visits – go to [page 16](#) for more information
- **Tasks** – will allow you to create new Task – go to [page 17](#) for more information
- **Logout** – to log out of the Portal, click **Logout**

# Actioning Notifications

The Home screen will display all the Tasks and Medications which have not been completed or are partially completed.

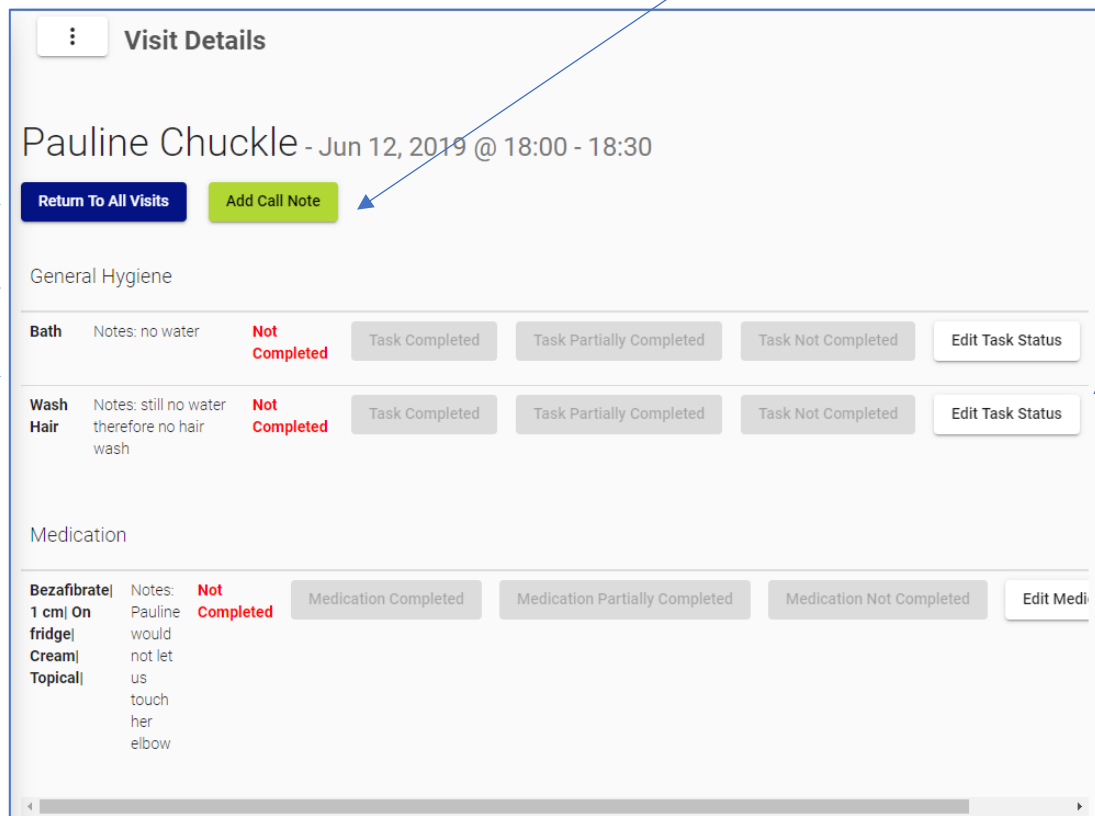
The screenshot displays a notification interface with two entries. The first entry is titled 'Meds partially done' and has a 'Visit Status: Completed' label. The notification text is 'June 12 10:51 Coe, Sebastian client refused, Medication was Adcal, Carer was Phillip Schofield (Client)'. It features a green 'Mark As Read' button and a blue 'Go To Visit' button. The second entry is titled 'Task partially done' and also has a 'Visit Status: Completed' label. The notification text is 'June 12 16:39 Coe, Sebastian Task was Personal Care, Carer was Lee Dixon (Client)'. It features a green 'Mark As Read' button and a blue 'Go To Visit' button.

To update the status of a Medication or Task select **Go to Visit**.





This will take you to the **Visit Details** screen.



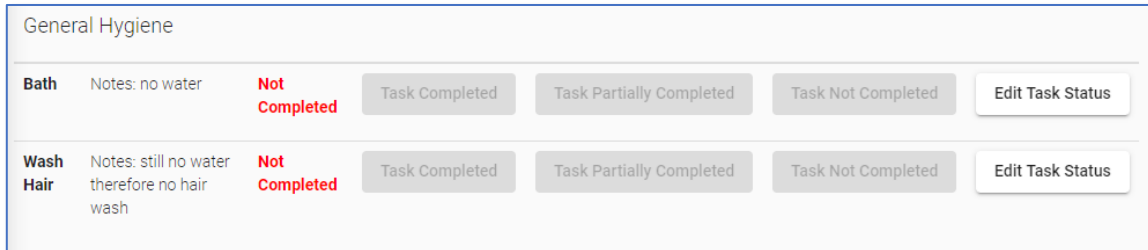
1	Client name, visit date and time is displayed here
2	To add a call note, click here
3	To return to the Visit screen click here
4	Task Types are displayed here
5	The Task (Need) which needs completing on the call is displayed here
6	The Medication which needs completing on the call is displayed here
7	Edit the Task status here. The Task can be marked as Task Completed, Task Partially Completed and Task Not Completed
8	Edit Medication status here. The Medication can be marked as Medication Completed, Medication Partially Completed and Medication Not Completed

# Updating a Task Status

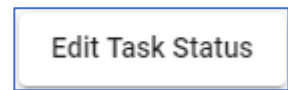
From the Home screen, select **Go To Visit** on a Task.



The Tasks that haven't been actioned will display.



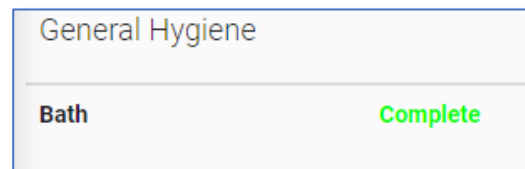
Click **Edit Task Status** next to the Task you wish to update.



Select either **Task Completed**, **Task Partially Completed** or **Task Not Completed**.

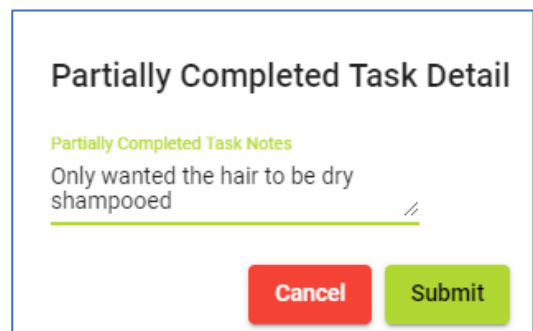


Selecting **Task Completed** will mark the Task as **Complete**.

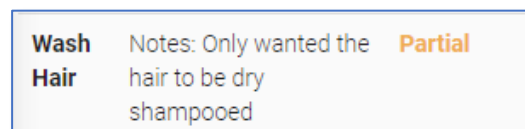


Selecting **Task Partially Completed** will prompt you to enter a reason to why this Task was partially completed.

Enter some notes where it displays Task Notes and press **Submit**.



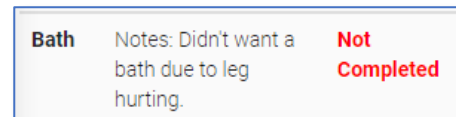
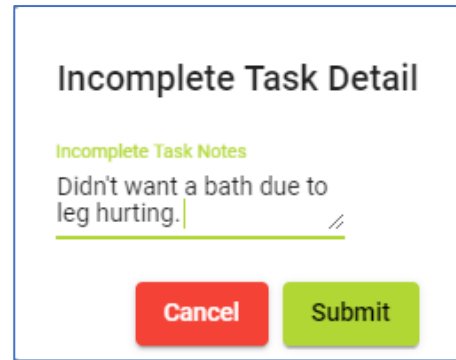
The Task will then be marked as **Partial** and the notes will be added to the Task.



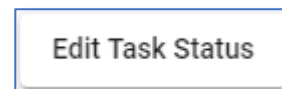
Selecting **Task Not Completed** will prompt you to enter a reason to why this Task wasn't completed.

Enter notes where it displays Task Notes and press **Submit**.

The Task will then be marked as **Not Completed** and the notes will be added to the Task.



At any point you can update and change a Task status or notes which have been added by selecting **Edit Task Status**.

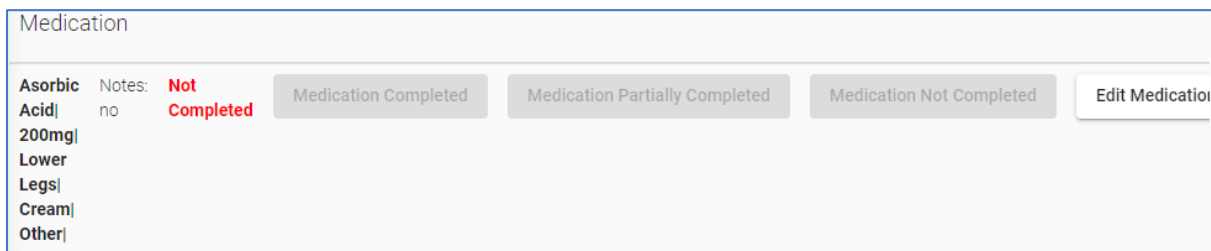


## Updating a Medication Status

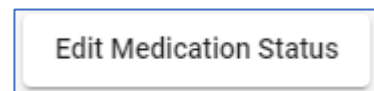
From the Home screen, select **Go To Visit** on a Medication.



The Meds that haven't been actioned will display.



Click **Edit Medication Status** next to the Medication you wish to update.



Select either **Medication Completed**, **Medication Partially Completed** or **Medication Not Completed**.

A screenshot of a medication management interface. On the left, there is a list of medication details: 'Asorbic Acid| 200mg| Lower Legs| Cream| Other|'. To the right of this list, the status is 'Notes: Not Completed'. Below the list are four buttons: 'Medication Completed' (green), 'Medication Partially Completed' (blue), 'Medication Not Completed' (red), and 'Edit Medication' (light blue).

Selecting **Medication Completed** will mark the Medication as **Complete**.

A screenshot of a medication record. The title is 'Medication'. The details are: 'Asorbic Acid| 200mg| Lower Legs| Cream| Other|'. The status is 'Notes: Complete' in green. The 'Medicine:' field contains 'Asorbic Acid' and the '200mg -' is listed below it.

Selecting **Medication Partially Completed** will prompt you to enter a reason to why this Medication was partially completed. It will also ask you to select a reason for partial-admin of meds.

A screenshot of the 'Partially Completed Task Detail' form. It has a title 'Partially Completed Task Detail'. Below the title is a text area for 'Partially Completed Task Notes' with the text 'Pain wasn't too bad today so she only had half of the dose'. Below that is a dropdown menu for 'Reason for partial-admin of meds' with 'Prn' selected. At the bottom are 'Cancel' and 'Submit' buttons.

Enter some notes where it displays Partially completed Task Notes and select a reason for partial-admin and press **Submit**.

The Medication will then be marked as **Partial** and the notes will be added to the Medication.

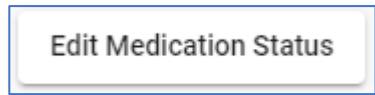
A screenshot of a medication record. The title is 'Medication'. The details are: 'Capsaicin| 250mg| Bathroom cabinet| Boxed Medication| Orally| Prompt|'. The status is 'Notes: Partial' in orange. The 'Medicine:' field contains 'Capsaicin' and '250mg -' is listed below it. The notes section contains: 'Pain wasn't too bad today so she only had half the dose'.

Selecting **Medication Not Completed** will prompt you to enter a reason to why this Medication wasn't completed. It will also ask you to select a reason for partial-admin of meds.

A screenshot of the 'Incomplete Task Detail' form. It has a title 'Incomplete Task Detail'. Below the title is a text area for 'Incomplete Task Notes' with the text 'Felt sick so refused'. Below that is a dropdown menu for 'Reason for none-admin ...' with 'Nausea Or Vomitin' selected. At the bottom are 'Cancel' and 'Submit' buttons.

Enter some notes where it displays incomplete Task Notes and select a reason for partial-admin and press **Submit**.

At any point you can update and change a Medication status, the notes or reason for non-admin which have been added by selecting **Edit Medication Status**.



## Clearing Task Notifications and Meds Notifications

Once the Tasks and Medications have been updated. You are able to clear the notifications from the Home screen.

Go to the Home screen where the Task and Medication Notifications are.

Once the status for all the Tasks/ Med have been updated press **Mark As Read**.



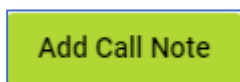
Once pressed this will clear the Notification.

## Adding a Call Note to a Call

Call notes can also be added onto a call if a carer should forget to complete one.

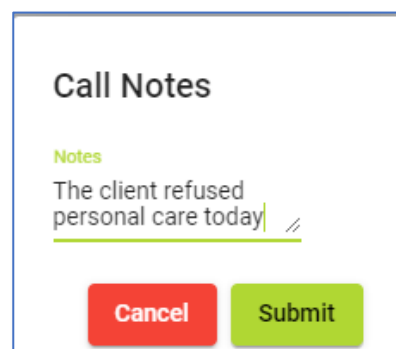
To add a call note, open the Task/ Med notification or open a visit from the Visits screen.

Press **Add Call Note**.



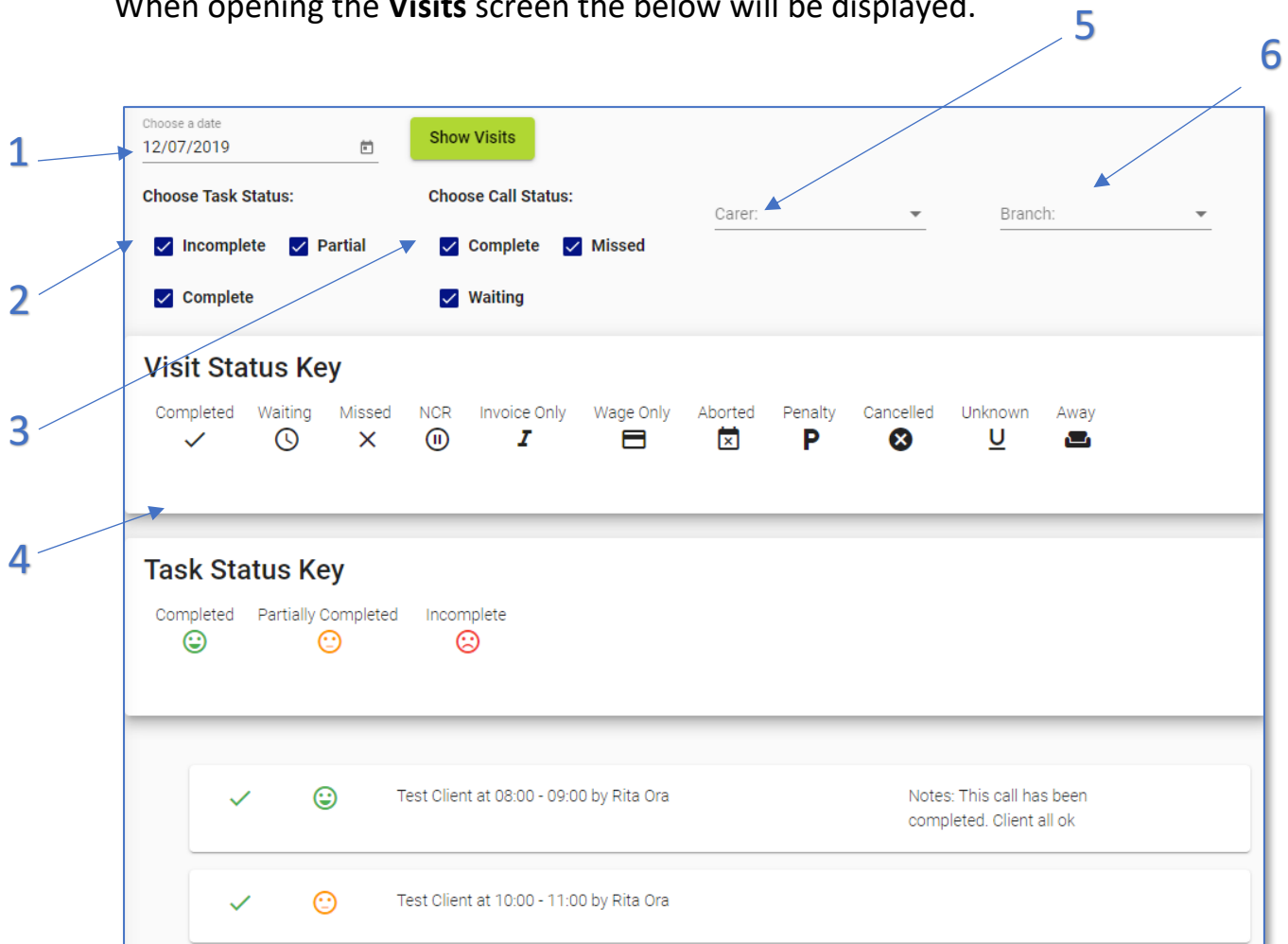
Enter any notes you wish to add into the notes free text box and press **Submit**.

The call note will then be added and can be viewed in CareFree.



# Viewing Client Visits

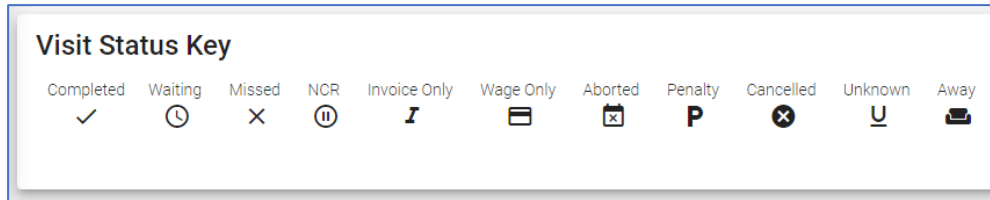
When opening the **Visits** screen the below will be displayed.



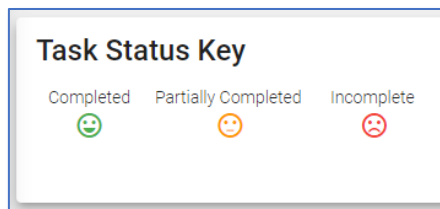
1	Change the date to view visits from a specific date. Choose the small calendar icon to view a month to month calendar view
2	Filter what visits to view where the task statuses are incomplete, partially complete or completed
3	Filter what visits to view where the call status is complete, missed or waiting
4	Visits are displayed here. Selecting a visit will allow you to update the Task/ Medications
5	Use the Carer drop-down box to filter the calls by a Carer
6	Use the Branch drop-down box to filter the calls by branch

## Client Visit Indicators

At the top of the visits there is a **Visit Status Key** showing what each call status indicates.



There is also a **Task Status Key** indicating whether task management is complete, partially complete or incomplete.



Click onto a visit to view more information about the Tasks and Medication or to update the status.

# Visits

Visits for all Clients can be viewed by clicking **Visits** on the left from the navigation bar.

The screenshot displays the 'Visits' interface. At the top, there is a date selector set to '12/07/2019' and a green 'Show Visits' button. Below this are two filter sections: 'Choose Task Status' with checkboxes for 'Incomplete', 'Partial', and 'Complete' (all checked); and 'Choose Call Status' with checkboxes for 'Complete', 'Missed', and 'Waiting' (all checked). To the right of these are two dropdown menus labeled 'Carer:' and 'Branch:'. Below the filters is a 'Visit Status Key' section with icons for Completed (checkmark), Waiting (clock), Missed (X), NCR (stop sign), Invoice Only (I), Wage Only (wallet), Aborted (calendar with X), Penalty (P), Cancelled (X in circle), Unknown (U), and Away (briefcase). Underneath is a 'Task Status Key' section with icons for Completed (green smiley), Partially Completed (orange neutral), and Incomplete (red sad). The bottom section shows two visit entries: 'Test Client at 08:00 - 09:00 by Rita Ora' with a green checkmark and smiley icon, and 'Test Client at 10:00 - 11:00 by Rita Ora' with a green checkmark and neutral icon. A note for the first entry reads: 'Notes: This call has been completed. Client all ok'.

This screen has got two additional drop-down boxes.

A close-up of the two dropdown boxes. The first is labeled 'Carer:' and the second is labeled 'Branch:'. Both have a downward-pointing arrow on the right side, indicating they are dropdown menus.

To filter all visits by a specific Carer using the **Carer** filter drop-down box, to filter by branch use the **Branch** filter drop-down box.

If you wish to filter both by Carer and branch both drop-down boxes can be used in conjunction with each other.



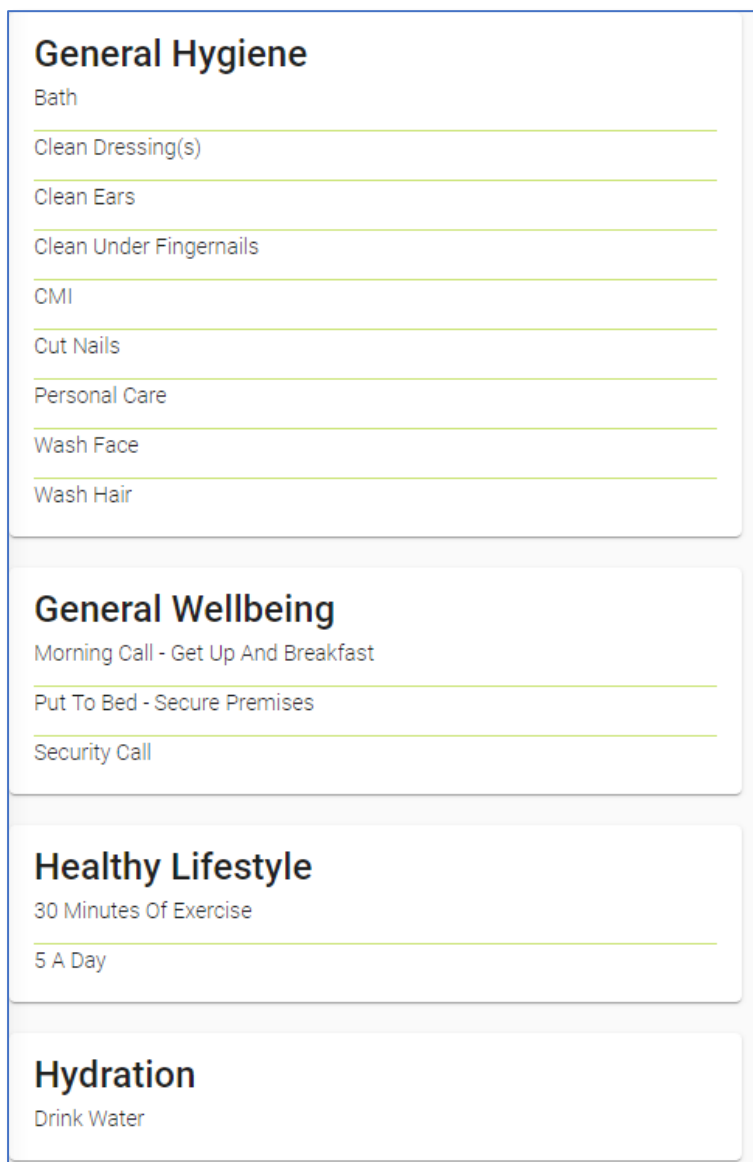
# Tasks

You are able to set up new tasks from within the Portal screen.

To create a new task, select **Tasks** from the navigation menu.



The Task screen will then display the Task Types and the individual tasks linked to the types.



**General Hygiene**

- Bath
- Clean Dressing(s)
- Clean Ears
- Clean Under Fingernails
- CMI
- Cut Nails
- Personal Care
- Wash Face
- Wash Hair

**General Wellbeing**

- Morning Call - Get Up And Breakfast
- Put To Bed - Secure Premises
- Security Call

**Healthy Lifestyle**

- 30 Minutes Of Exercise
- 5 A Day

**Hydration**

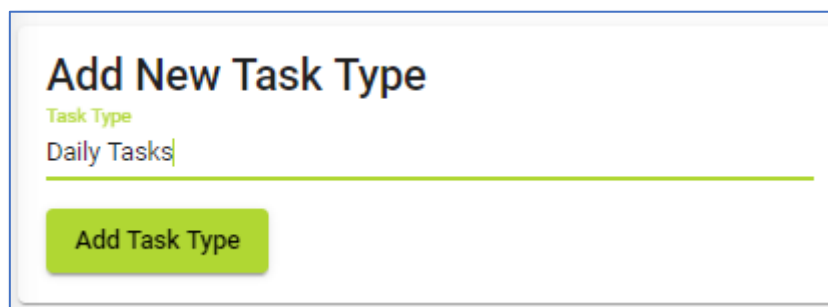
- Drink Water

## Creating Tasks Types and Tasks

To create a Task Type click **Add New** at the top of the Tasks screen.

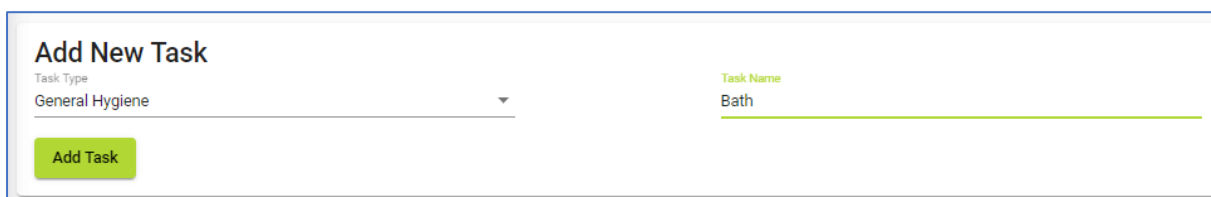


Under the heading **Add New Task Type**, type in the name of the new Task Type then click **Add Task Type**.

A screenshot of a form titled "Add New Task Type". Below the title is a label "Task Type" in green. A text input field contains the text "Daily Tasks" with a green underline. Below the input field is a green button with the text "Add Task Type".

Under the heading **Add New Task**, use the **Task Type** drop-down to choose which Type to put the Task under.

Type the name of the new Task in the **Task Name** field then click **Add Task**.

A screenshot of a form titled "Add New Task". On the left, there is a "Task Type" drop-down menu with "General Hygiene" selected. On the right, there is a "Task Name" text input field with "Bath" entered. Below the input fields is a green button with the text "Add Task".