



# CareFree Day 1 Training Guide



# Page Contents

<b>Getting Started .....</b>	<b>7</b>
Logging In .....	7
Selecting your Companies and Branches.....	8
Navigating the System .....	9
CareFree’s Shortcut Keys .....	10
Common System Functionality .....	11
New .....	11
Edit .....	11
Delete.....	11
Close.....	11
Show Me .....	11
<b>The Carer Screen.....</b>	<b>12</b>
Adding a Carer.....	13
Carer Screen Tabs .....	13
General.....	13
Storing Photographs .....	13
Checking Postcodes.....	14
Other Details .....	14
Start Dates and End Dates .....	15
Minimum and Maximum Hours.....	15
Mileage and Travel Time.....	16
Calculate Distance Between Calls .....	17
Setting Mileage Rates for All New Carers .....	17
Additional Data in the Other Details Tab.....	18
Qualifications .....	19
Adding Qualifications .....	19
Wages.....	20
Security .....	20
Branches.....	21
Log.....	21
Creating a New Contact Log Entry .....	21

Assign Logs to Specific Users.....	23
Daily Log.....	25
To View the Daily Log Screen.....	25
Attachments.....	26
To Add an Attachment.....	26
Extras.....	26
Notes.....	27
Contacts.....	27
To Add a New Contact.....	27
To Create a Link to an Existing Contact.....	27
Holidays.....	28
Configuring the Holiday Entitlement Calculator.....	28
Using the Calculator for Hours Based Entitlements.....	30
Using the Calculator for Days based Entitlements.....	31
To Manually Add Entitlement.....	32
Payroll.....	32
Outcomes.....	34
Sent Box.....	34
History.....	34
Planner.....	35
Continuity.....	36
<b>The Items Screen.....</b>	<b>37</b>
Making Changes to Existing Items.....	38
Adding New Items.....	38
<b>The Clients Screen.....</b>	<b>39</b>
Clients Screen Tabs.....	39
General.....	39
Other Details.....	40
Contracts.....	41
Invoices.....	41
Contacts.....	41
Log.....	41
Attachments.....	41
Extras.....	41
Notes.....	41
Agreements.....	41

Needs & Skills.....	42
Warnings.....	42
Budget.....	43
To Create a New Budget Entry.....	43
Outcomes.....	43
Sent Box.....	43
Continuity.....	44
<b>Contracts.....</b>	<b>45</b>
How Contracts Work.....	45
Adding a New Contract.....	46
Using the Clients Contracts tab to Create a Private Contract.....	46
Step One.....	47
Step Two.....	47
Step Three.....	48
Step Four.....	49
Using the Contracts Screen to Create New Shared/Blanket Contracts.....	50
Creating a New Contract in the Contracts Screen.....	51
Including a Shared/Blanket Contract on a Clients Record.....	52
<b>Clients &amp; Carers Preferences.....</b>	<b>53</b>
Accessing Client/Carer Preferences.....	53
General Settings.....	54
Carers.....	54
Clients.....	54
Exclusions.....	55
What do Exclusions do?.....	55
Carers Exclusions.....	55
Clients Exclusions.....	56
<b>Packages of Care.....</b>	<b>57</b>
Creating a Package of Care.....	57
Care Package Wizard.....	58
Call Types.....	59
Allocating a Carer on the Package Wizard.....	59
Alert.....	59
Other Fields.....	59
Reset, Create and Close.....	60
Amending a Package of Care.....	60

<b>The Rota Screen .....</b>	<b>61</b>
Rota Screen Overview .....	61
Managing Calls .....	62
Select the Correct Working Mode .....	62
Working in This Week .....	62
Working in This Week & Beyond .....	62
Editing Call Details.....	63
Double-Clicking .....	63
Selecting and Amending Multiple Calls.....	64
Right-Click Options.....	65
Dragging and Dropping .....	66
Adding & Deleting Calls.....	67
Adding a Call.....	67
Additional Call Types.....	68
Deleting Calls.....	69
Setting Call Alerts .....	70
Allocating Calls .....	71
Viewing Unallocated Calls.....	71
To Access the Trace for a Specific Call .....	72
Allocating calls from the Unallocated Screen .....	73
Allocating a Carer to an Individual Call .....	73
Allocating a Call from the Rota .....	74
Matching Criteria .....	75
Available.....	75
Near By.....	75
Skill Set.....	75
Previous Visits .....	75
Short on Hours .....	75
Preferred Carer .....	75
Excluded by Carer/Client.....	75
Cultural Matching .....	75
Changing the Priority Order .....	76
Show Unallocated Calls – Branch Filter .....	77
Unallocating Calls.....	78
Runs.....	79
Setting up Runs .....	79

Add Calls to Runs.....	80
Mark Runs as Inactive .....	80
<b>Using CareFree to Communicate.....</b>	<b>81</b>
Sending a Message.....	81
<b>Pop-Up Notes .....</b>	<b>82</b>
Adding a Pop-Up Note .....	82
To Amend/Delete a Pop-Up Note .....	83
<b>CareFree Security.....</b>	<b>84</b>
CareFree User Security.....	84
User Roles .....	84
Financial Information User Access.....	85
Adding Users .....	86
Logging in as a Different User .....	87
CareFree Password Security.....	88
Resetting and Changing Passwords .....	88
Password Security – Shared Options .....	89

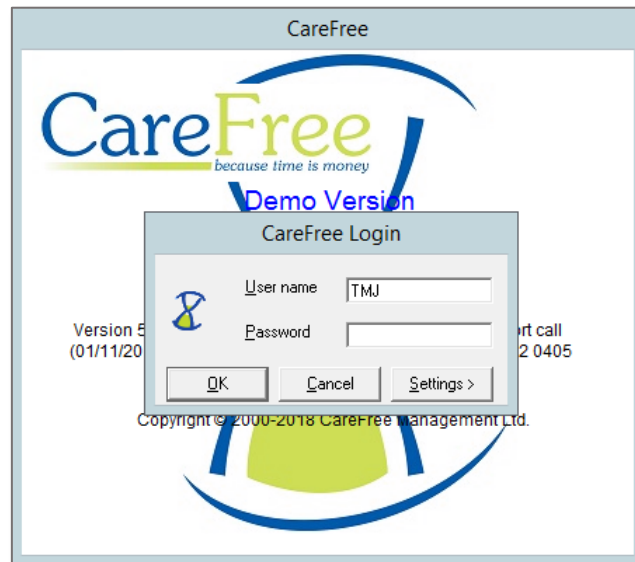
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20/08/2018	Lyndsay Williamson	CareFree 5.5	V1
30/08/2018	Kayleigh Bainbridge	CareFree 5.5	V2

# Getting Started

## Logging In

Like most computer software you need to log into the system before you can begin working. This ensures that the work that you do is logged and recorded correctly as well as filtering access to the different parts of the system according to your user rights.

1. Open CareFree
2. Enter your **Username** and **Password**



You can add users or change passwords by accessing the tools drop-down and selecting maintain users. This is covered in more detail later in this user guide. It is also possible to select or de-select varying permissions for a given user role by changing the permissions within the user roles list in the items screen

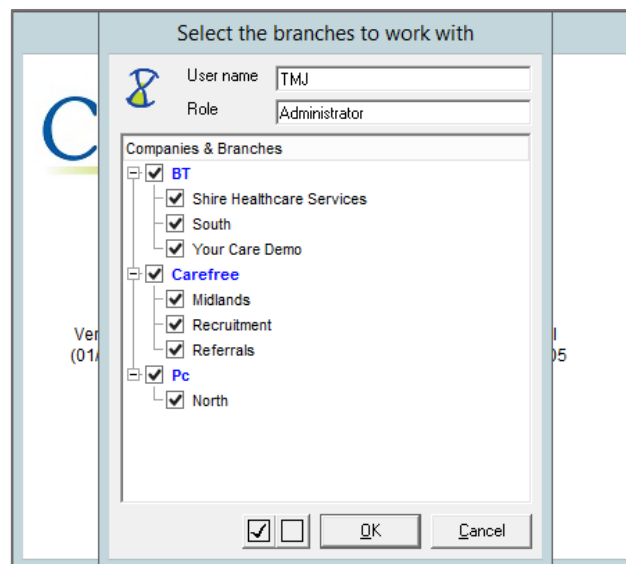
## Selecting your Companies and Branches

Depending on your role within your organisation. You may wish to login to view all companies and branches or just the ones you work in.

After logging in you will be presented with a list of all the companies and branches within your organisation (companies are in blue and branches are in black).

De-select a certain company and/or branch by clicking on the  by the side of the branch you don't wish to view.

You can quickly de-select or select all branches by using the   icons at the bottom.



Once you have made your selection press **OK** to continue.

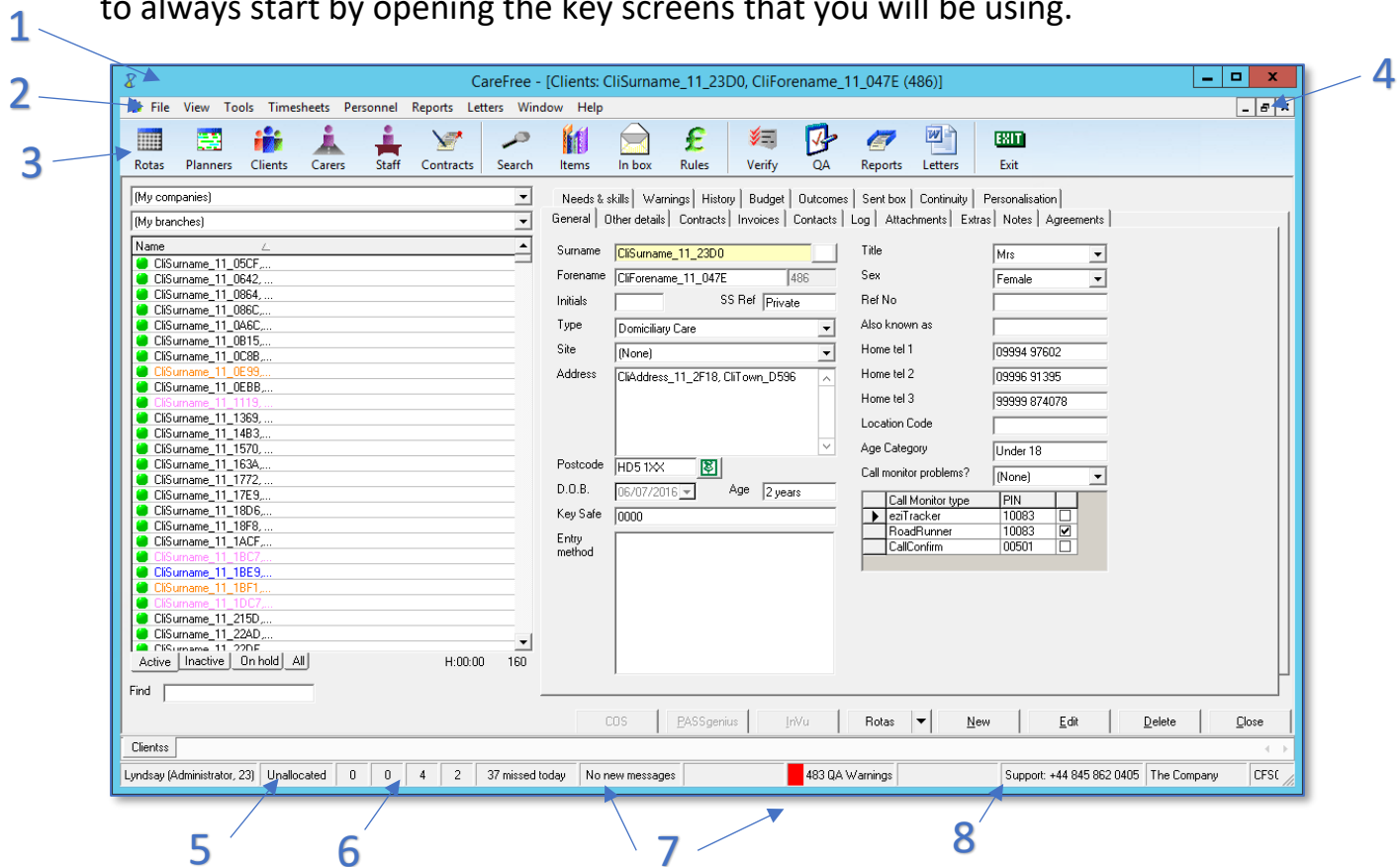
The   to select and de-select groups of options are used throughout CareFree

Depending on your user is configured, you may not be able to see all of the companies and branches in your organisation



# Navigating the System

Once you become an experienced user of the software you will settle into a routine for your specific way of working but in the early stages it is a good idea to always start by opening the key screens that you will be using.



1	The title bar shows which screen within CareFree is currently open
2	The drop-down menus provide access to all functions and options
3	Icons on the toolbar provide quick access to most of the commonly used functions/screens
4	Use the maximise button to expand any screens
5	Double-click on <b>Unallocated</b> to view all current unallocated calls
6	These numbers indicate the total unallocated calls for today, tomorrow, this week & next week
7	These boxes indicate new messages or QA Warnings
8	CareFree support telephone number is always visible at the bottom of the screen

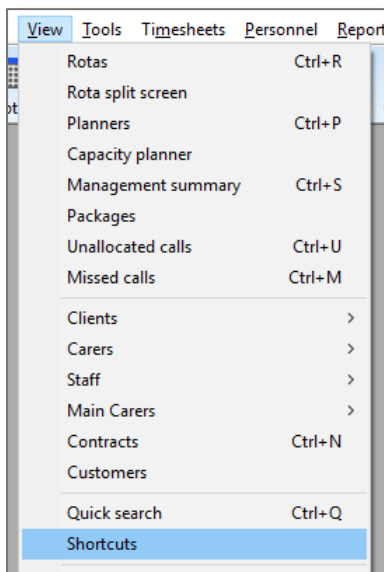
Click on the icons on your toolbar and the screens will open. Use the maximise button to expand any screens.

## CareFree's Shortcut Keys

Keyboard shortcuts are often used in windows-based software to provide a quick way to access particular screens or options using just the keyboard.

There are a number of these shortcuts available in CareFree.

The list of shortcut keys can be accessed by clicking the **View** on the drop-down menu and selecting **Shortcuts**.



## Common System Functionality

When using CareFree you will frequently see and use actions buttons which are located towards the bottom right hand side of the screen.



### New

This will allow you to create a new record or event.

Care should be taken not to select this when wanting to add new information to an existing record.

### Edit

This will allow you to edit and change an existing record or event (for example, updating contact details for a Carer).

### Delete

This will delete the record or event.

When a Client/Carer leaves you should mark them as inactive as opposed to deleting their record. This is done by changing their start or end dates within their other details tab

### Close

This will close the screen you are in.

### Show Me

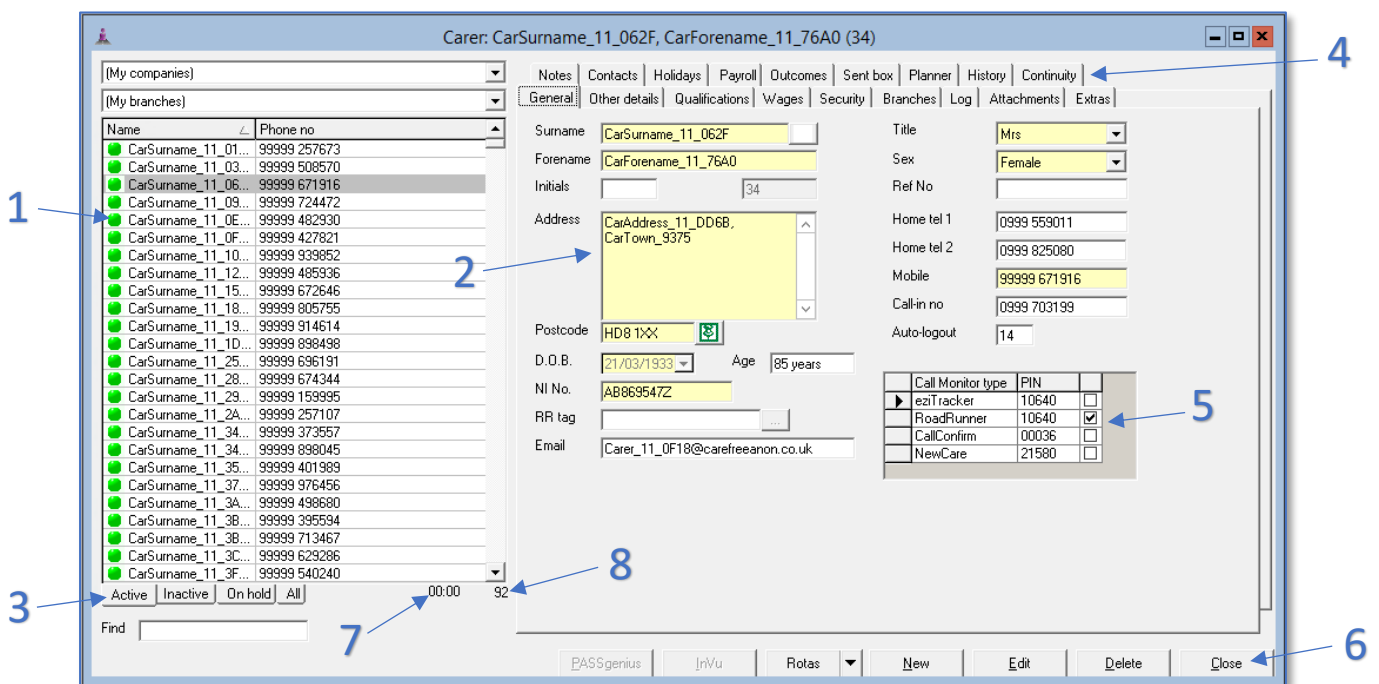
The Show Me functionality appears in some (not all) of the drop-downs around the CareFree system. This will allow you to add more options to the drop-down list you are using.



# The Carer Screen

The Carer screen acts as place to store all the information you might need relating to your Carers and any other staff that you wish to store details for on the system.

Once the details for a Carer have been input, their name will appear in the list on the left-hand side of the screen. You can view the details for each Carer by selecting their name in the list.



1	Select a Carer from the list to view their record
2	Enter all the relevant information about the Carer; not all fields need to be filled in although the surname field is mandatory
3	These tabs will display active, inactive, on hold or all Carers
4	These tabs allow users to view different sections of the Carers record
5	Information relating to the call monitoring system used by this Carer
6	These action buttons are explained on <a href="#">page 11</a>
7	This number shows the total number of hours of care allocated to the list of Carers for the present week
8	This number shows the number of Carers in the list

## Adding a Carer

1. Open the **Carers** screen
2. Click on **New**
3. Complete the details for the Carer on each of the tabs within the Carer record (the next section of this guide will explain each tab)

Fields highlighted in yellow are set as mandatory fields in the system and must be populated before a record can be saved. These fields can be chosen by accessing the mandatory fields screen in the tools menu at the top of the screen


## Carer Screen Tabs

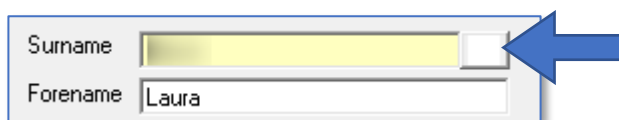
### General

The General tab contains fields that hold the most basic information such as the Carers name and address details.

### Storing Photographs

It is possible to store a photograph of the Carer by using the button next to their surname.

1. Click **Edit** 
2. Click on the button next to the surname field



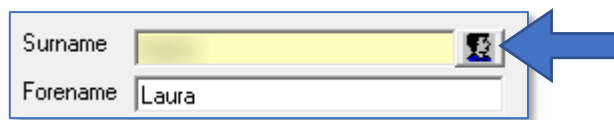
Surname	<input type="text"/>	<input type="button" value=""/>
Forename	Laura	

3. Click **Load** 

If Load is greyed out you have forgotten to press Edit!

4. Browse to the photograph you wish to upload to the Carers record and click **Open**
5. Click **Save**

Once a photograph has been uploaded the button next to the surname field will change as follows.



## **Checking Postcodes**

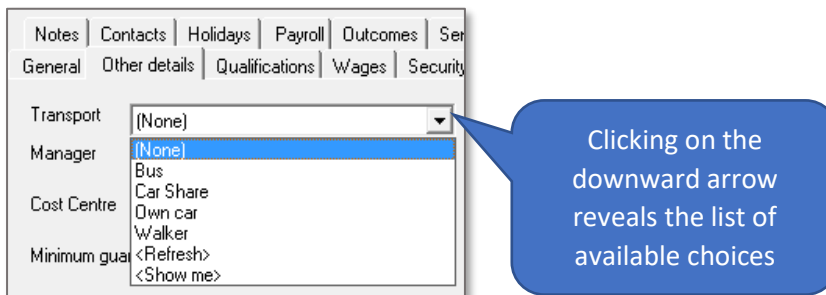
It is a good idea to check the postcode by clicking on the green push pin located to the side of the postcode field.

This will open google maps to show the location that the postcode refers to.



## **Other Details**

Fields such as Transport and Manager are populated by selecting an option from a drop-down list of predetermined choices.



The choices available in the drop-down list may not include an option which is suitable for your needs. If this is the case you can create additional options by adding them within the items screen. Please refer to [page 37](#) for information on using the items screen.

## Start Dates and End Dates

The two date fields in the other details tabs are mandatory. The start date will be pre-populated with today's date and the end date will be set to the system default end date of 31/12/2099.

Start date	30/01/2017
Estimated end date	31/12/2099

If the current date falls between the start date and end date the Carers record will be marked as active.

Changing the start date to a future date (for Carers who haven't started yet) or the end date to a date in the past (for Carers who have left) will change the status of the record to inactive.

## Minimum and Maximum Hours

The two fields allow you set a minimum number of hours that you would like to offer a given Carer as well as setting a maximum number of hours that an individual Carer would like to work.

Minimum guaranteed hours	10
Maximum hours allowed	48

Name	Phone no	Hours
CarSurname_11_015F...	99999 257673	01:00
CarSurname_11_031C...	99999 508570	00:00
CarSurname_11_062F...	99999 671916	03:30
CarSurname_11_093D...	99999 724472	00:00
CarSurname_11_0E32...	99999 482930	01:00
CarSurname_11_0FDA...	99999 427821	00:00
CarSurname_11_10CA...	99999 939852	00:00
CarSurname_11_1201...	99999 485936	00:00
CarSurname_11_1516...	99999 672646	00:00
CarSurname_11_1806...	99999 805755	00:00
CarSurname_11_19ED...	99999 914614	00:00
CarSurname_11_1D8D...	99999 898498	00:00
CarSurname_11_25BC...	99999 696191	00:00
CarSurname_11_28B2...	99999 674344	00:00

If a Carer does not meet their minimum hours their name will appear in red on rota. If you try and allocate a call when the Carer has reached their maximum hours a warning can pop up.

## Mileage and Travel Time

Mileage rates can be entered for an individual Carer. There are multiple options within the Travel options area to specify how you pay mileage/Travel time to the Carer.

Use the first drop-down to specify how the Carer is paid mileage.

By Mile	Mileage is paid based on how many miles the Carer has done
By Call	Mileage is paid based on how many calls the Carer has completed
None	If you do not pay mileage to your Carers
By Day	A set amount of mileage is paid for the day
By Time (per min)	Mileage is paid via travel time i.e. 13p per minute of travelling time
By Mile & Time (per min)	A combination of the By Mile and By Time (per min) options if you pay for both

Use the second drop-down to specify further information to how mileage is paid.

Between calls only	Mileage is paid between calls
Calls+From Home	Mileage is paid to travel from home to the first call and between calls
Calls+To Home	Mileage is paid to travel home from the last call and between calls
Calls+From+To Home	Mileage is paid to travel from and to home and between calls
Calls+From+To Home	Mileage is paid to travel from and to the office and between calls

A gap can be placed between calls so that the Carer will not show as available for a period of time after the call. This value is in minutes.

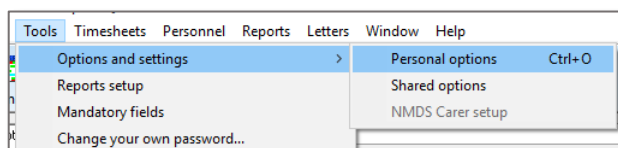
Enter the mileage rate and/or travel rate depending on which options you have selected. If you have selected By Time or By Mile & Time then the travel rate field must be filled in.



## Calculate Distance Between Calls

To pay mileage onto a Carers wage sheet via CareFree you must ensure the following setting is enabled.

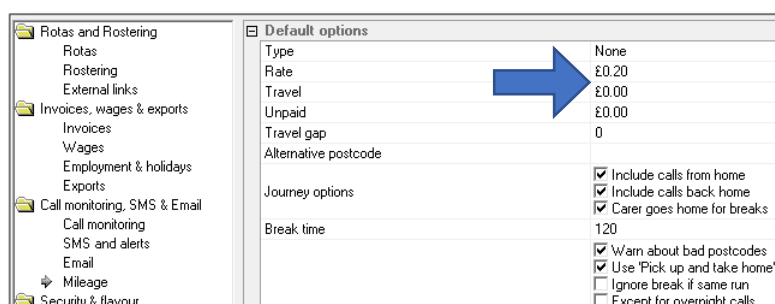
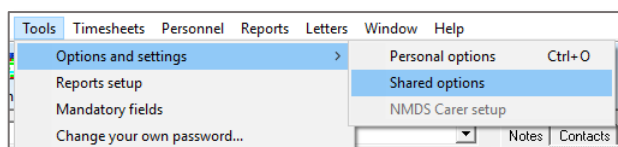
1. Go to **Tools**
2. Click **Options and Settings**
3. Click **Personal Options**
4. Scroll down the right-hand side of the screen and ensure **Calculate the distance between calls** is ticked
5. Click **OK**



## Setting Mileage Rates for All New Carers

A mileage rate and/or travel rate can be set for all new Carers added onto CareFree. By changing these options it will enter the mileage on for any new Carers that are added to CareFree, not existing Carers.

1. Go to **Tools**
2. Click **Options and settings**
3. Click **Shared options**
4. Click **Mileage**
5. Enter the **Rate** field as the mileage rate and the **Travel** field as the travel rate
6. Click **OK** to save these rates



## Additional Data in the Other Details Tab

The screenshot shows the 'Other Details' tab of a software interface. The fields are organized into two columns. The left column contains: Transport (dropdown), Manager (dropdown), Cost Centre (text), Minimum guaranteed hours (input: 20), Maximum hours allowed (input: 48), and Travel options (dropdown with sub-fields: By Mile, Gap, Between calls only, Mileage rate, Travel rate). The right column contains: Start date (dropdown: 07/04/2017), Estimated end date (dropdown: 31/12/2099), Reason (dropdown), Destination (dropdown), Disabled (dropdown: No disability), Key holder (dropdown: No), NMDS Status (dropdown: New), Carer type (dropdown: Care worker), and Pass ID (text). Blue arrows point to fields 1 through 10, corresponding to the list below.

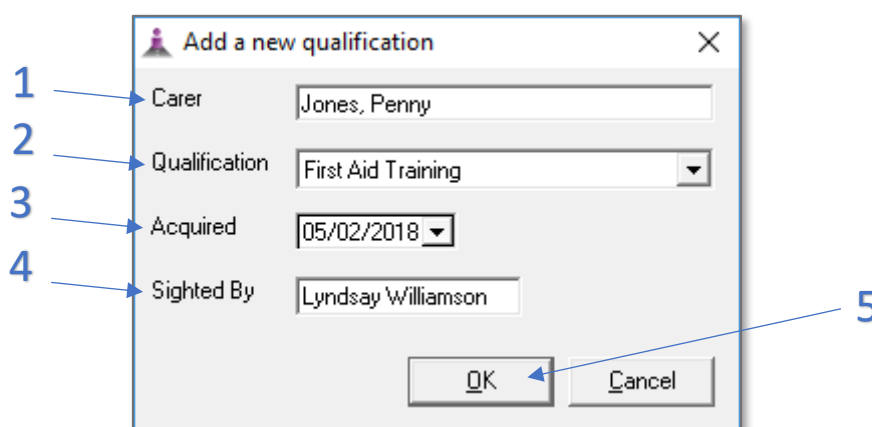
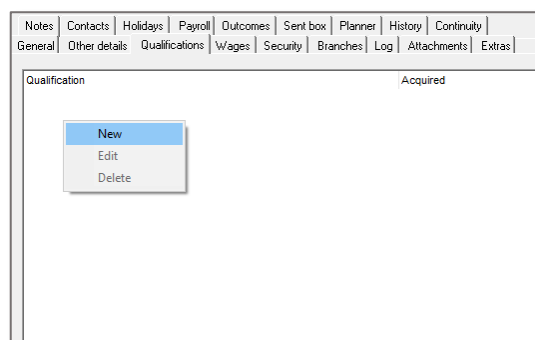
1	See <a href="#">page 14</a> for more information about the <b>Transport</b> and <b>Manager</b> drop-downs
2	See <a href="#">page 15</a> for more information about <b>Minimum guaranteed hours</b> and <b>Maximum guaranteed hours</b> allowed
3	See <a href="#">page 16</a> for more information about setting up <b>Mileage/Travel Time</b>
4	See <a href="#">page 15</a> for more information about <b>Start Date</b> and <b>End Date</b>
5	When an end date is entered for a Carer the <b>Reason</b> and <b>Destination</b> drop-downs can be populated with a reason to why they have left the company and where they have gone to
6	Specify if the Carer has a <b>Disability</b>
7	Specify if the Carer has a key to the office
8	Information can be entered about the Carers <b>NMDS Status</b>
9	A Carer can be set as a care worker or a staff member. If the Carer is set as a staff member they will be placed in the Staff list rather than the Carer list
10	This is used for PASS system integration with CareFree

## Qualifications

Using the Qualification tab allows you to record the qualifications achieved by your Carers centrally in one place. This information is used to ensure that the requirements of an individual client are met by ensuring that the carer is appropriately qualified.

### Adding Qualifications

1. Click **Edit**
2. Right-click the blank area in the qualifications screen
3. Click **New**



1	The Carers name will already be populated
2	Use the <b>Qualification</b> drop-down to select which qualification the Carer has completed
3	Use the <b>Acquired</b> drop-down to select which date the Carer completed the qualification
4	Use the <b>Sighted By</b> field to enter a person who witnessed the Carer achieve the qualification (optional)
5	Click <b>OK</b> to save this information onto the Carers record

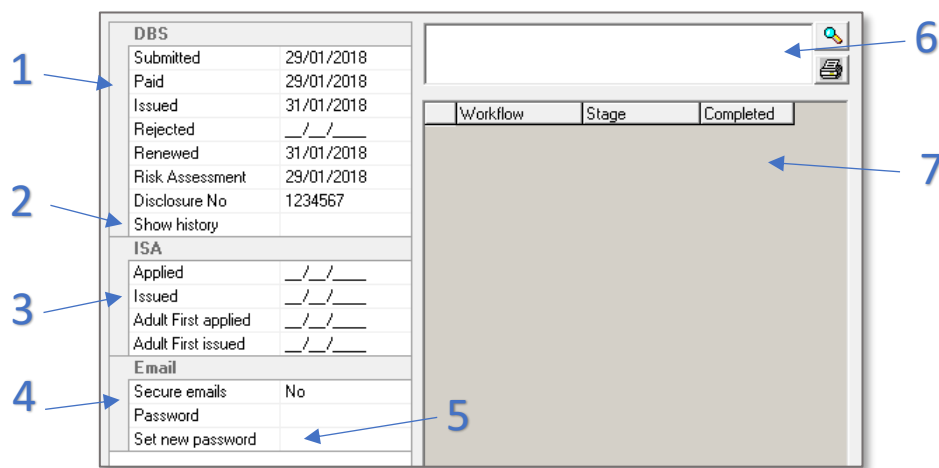
A qualification can be edited or deleted by selecting the qualification then right-clicking the qualification and clicking delete or edit


## Wages

The Wages tab will contain a record of all previously finalised wage sheets for the Carer. This can be used to review previous wage sheets or to unfinalise them should changes be required after the wages have been run.

## Security

Within the Security tab you can store the information relating to the Carers DBS/ISA checks as well as security details for opening encrypted emails containing rotas and sensitive data.



1	Enter details relating to the DBS checks in the appropriate boxes
2	A history of DBS disclosure checks can be viewed by entering the Edit mode and clicking this button
3	Historic ISA data
4	Secure Emails can be switched on here. Please speak to your account manager for more details
5	Click this button to generate a password for Secure Emails 
6	Any notes regarding the DBS checks for the Carer can be stored here, click the magnifying glass to add notes
7	Workflows for the Carer can be stored and viewed here

It is possible within CareFree's Options/Rostering and Rotas screen to restrict Carers from being allocated to single calls unless their DBS disclosure number has been entered in the Security Tab

## Branches

The Branches and areas that a Carer will cover can be specified in this tab. Each Carer should be given a Home Company and Home Branch but ticking/unticking additional branches will make the Carer available/unavailable to attend calls in those areas.

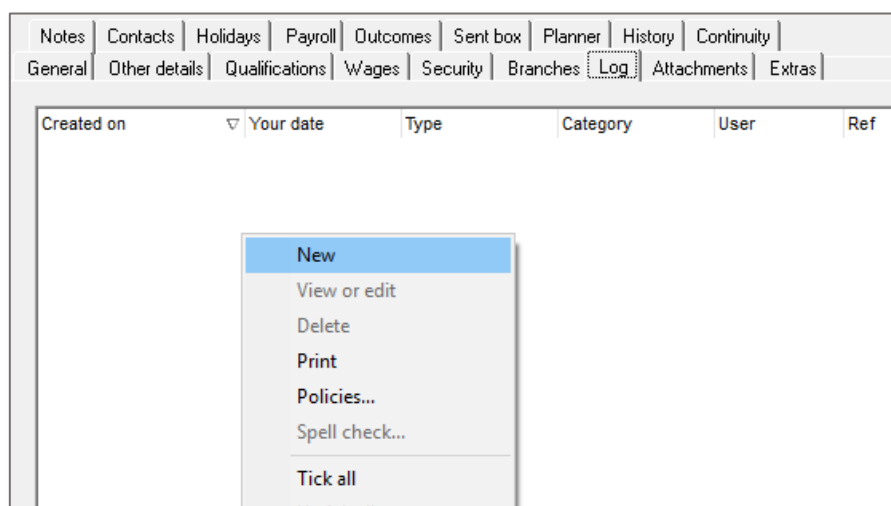
## Log

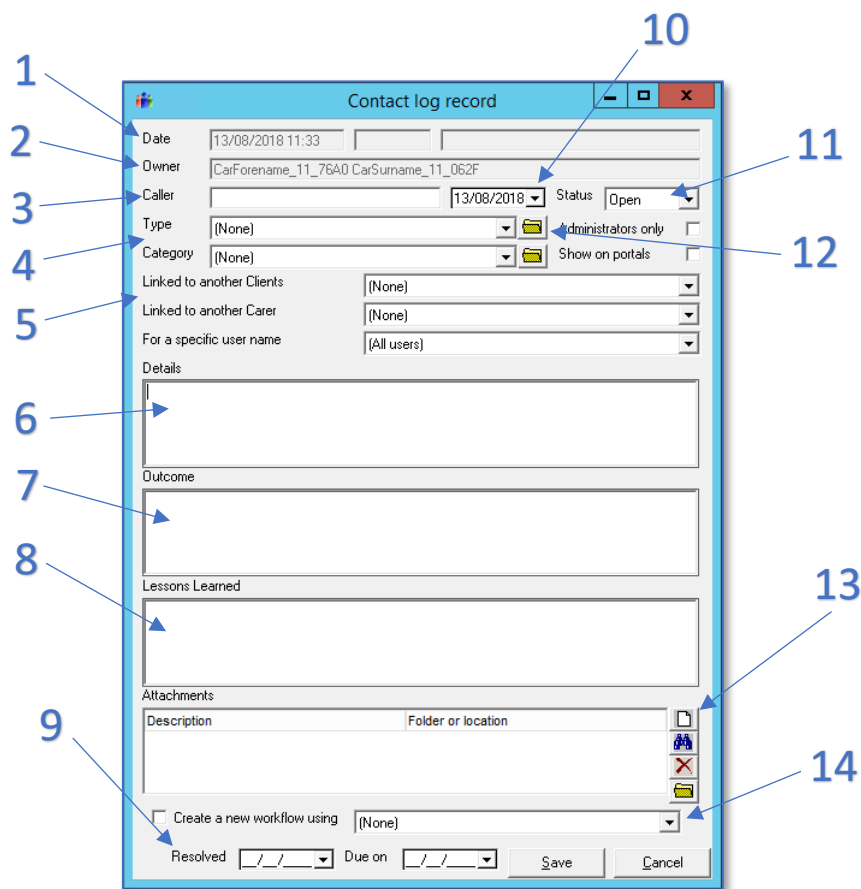
The Contact Log is perhaps one of the most important parts of CareFree. It allows users to record events, conversations, telephone calls, messages and much more. It enables comprehensive reports to be generated about the business which help to monitor activity and performance and assist with providing accurate data to organisations such as the CQC.

When a user creates a new Contact Log entry, it will be given a fixed date and time stamp which means the data can be used (if required) in a court of law

### Creating a New Contact Log Entry

1. Click **Edit**
2. Right-click the blank area in the log screen
3. Click **New**



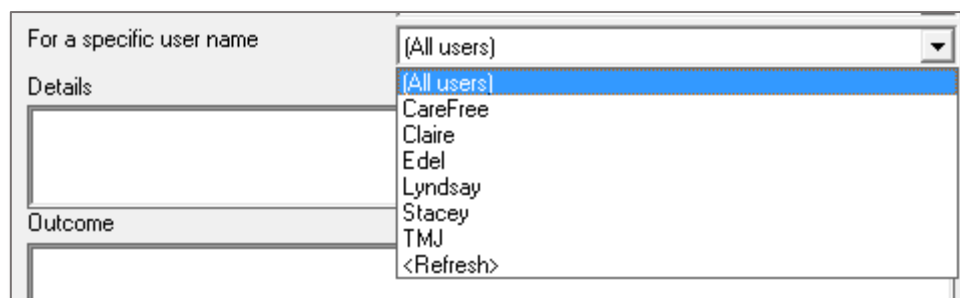


1	Fixed date and time stamp
2	This will show which Carer the log will be recorded against
3	Name of the person calling/reporting an issue
4	It is important to select the correct log type and category from the drop-down lists to ensure reports are accurate
5	Selecting a Client and/or Carer name in these drop-down boxes will copy the log to their records
6	Free text box to add details of the event
7	Free text box to add the outcome/resolution
8	Free text box to add lessons learnt
9	Once the issue is resolved a date can be added here – please note, this does not automatically change the status field
10	An alternative date can be specified if a message is taken when a user does not have access to CareFree
11	This is used to set the status of a log to closed, once the issues have been dealt with
12	The folders can be used to open company policy/procedure documents which are linked to a contact log type or category
13	Documents can be added to the log here. Click the paper icon to add an attachment to the log and click on the Red X to delete
14	To start a workflow for a log, use the drop-down to select the workflow type

## Assign Logs to Specific Users

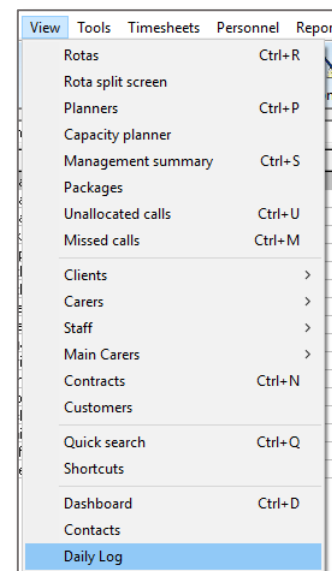
You can assign Contact Logs to specific CareFree users. This creates a task list for a specific CareFree user which includes only Contact Logs that require attention/action.

1. Create a new Contact Log for either a Client or a Carer in the usual way
2. Use the **For a specific user name** drop-down to assign the log to a CareFree user



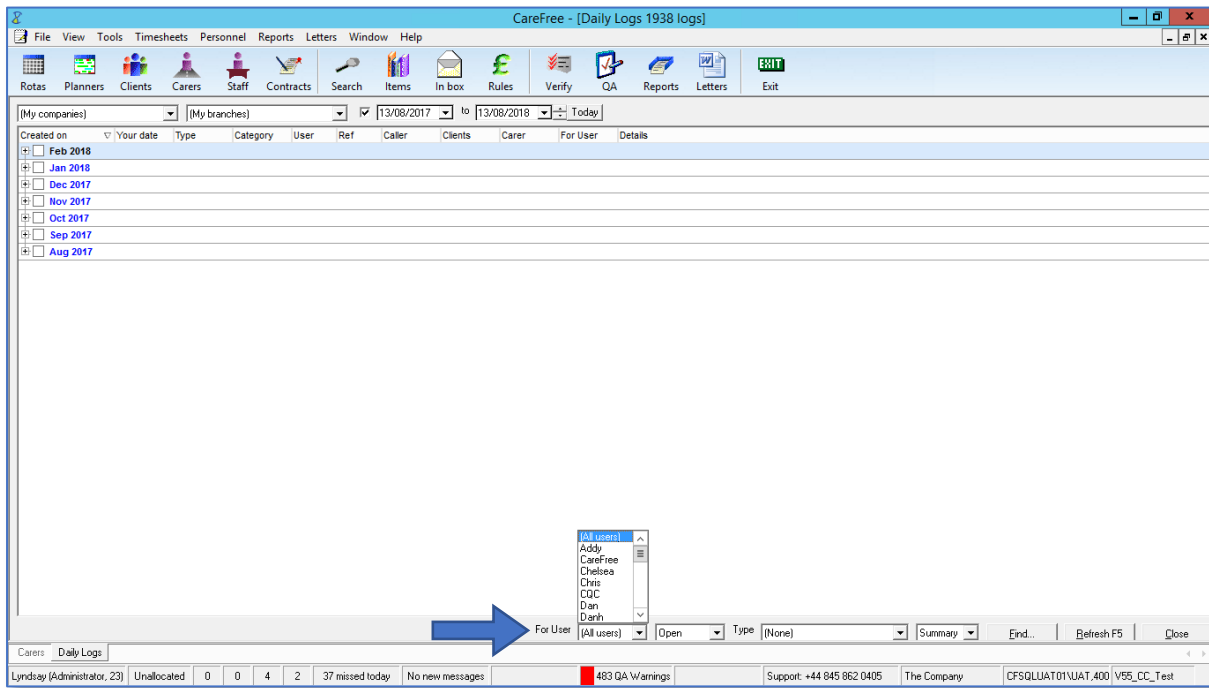
To view logs assigned to specific users the daily log screen must be used:

1. Go to **View**
2. Click **Daily Log**

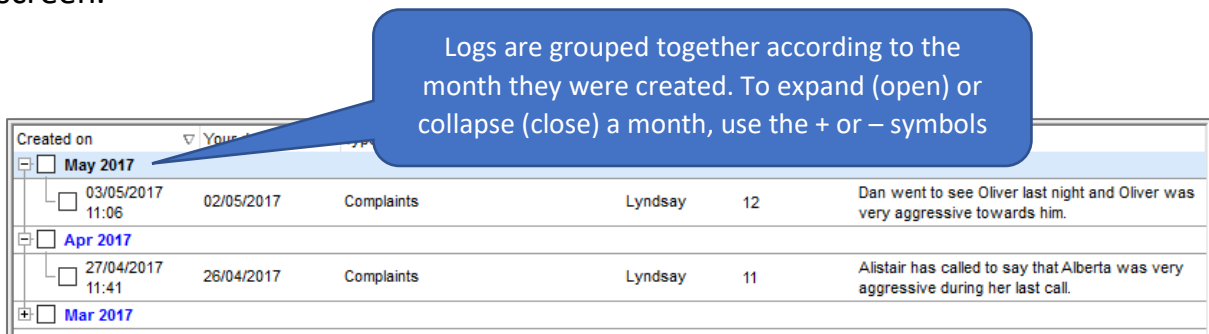


This screen is designed to show all logs created for all Clients and Carers within a specific date range.

Use the **For User** drop-down, to filter the logs which are assigned to specific users as shown below.



Once you have saved the log an entry it will appear in the log tab on the Carer screen.



Right-clicking a Log entry provides access to additional options including edit, delete and spell checking

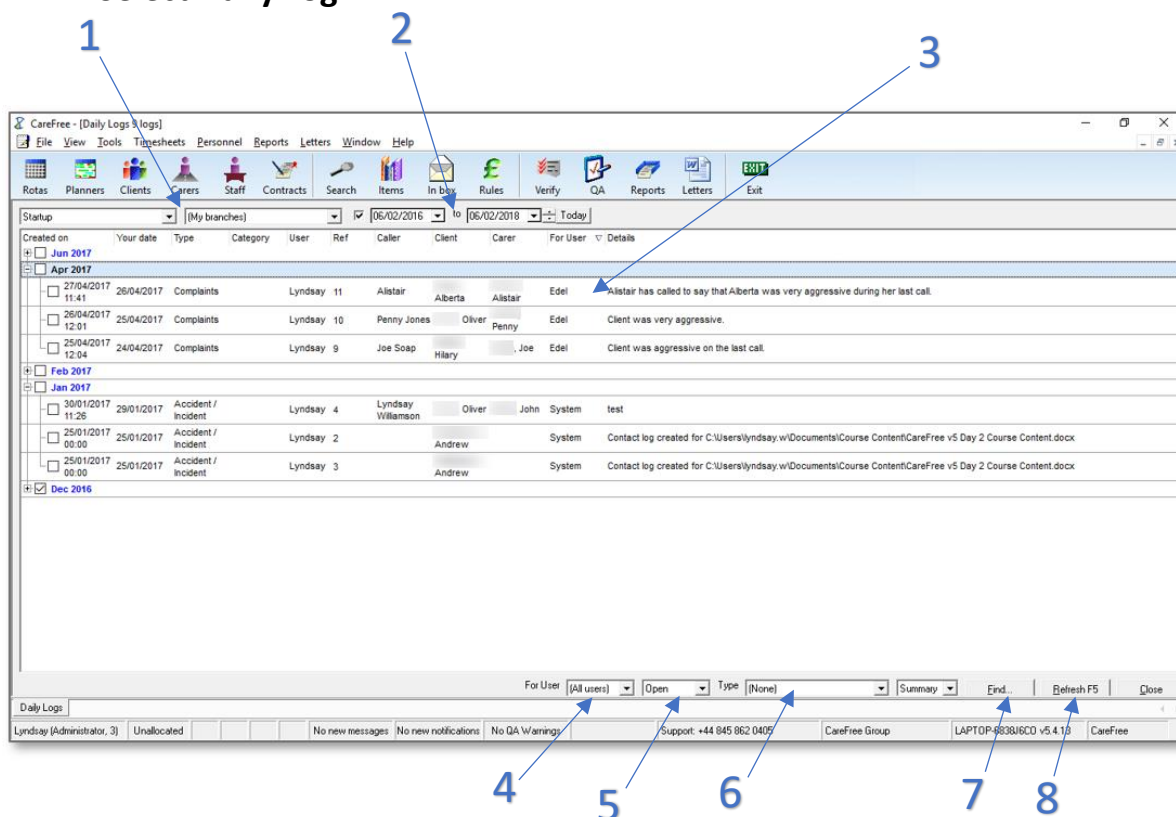


## Daily Log

It is possible for users to view all current Contact Log entries. This allows you to monitor and track all current/outstanding issues much like looking at a paper-based diary or day book.

### To View the Daily Log Screen

1. Go to the **View** drop-down menu
2. Select **Daily Log**



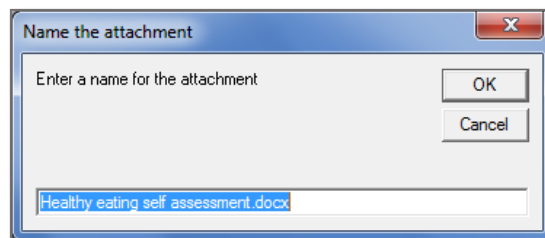
1	Use this drop-down list to see logs from certain companies and/or branches
2	View log entries created within a specific date range by using these boxes
3	Logs which match the filters a user has specified will appear here. To edit a log, double-click on the entry in question
4	Use this drop-down to filter logs for a specific CareFree user
5	Use this drop-down to filter open, closed or all logs
6	Use this drop-down to filter types of logs
7	Use the find button to search for a log reference
8	Use the refresh button if you have applied a filter to the drop-downs

## Attachments

The Attachments tab allows you to store links to documents saved on your computer or network. This allows for quick direct access to documents relating to the Carer record without leaving the CareFree environment. It does not create duplicate documents it simply links to the location of the existing document.

### To Add an Attachment

1. Click **Edit**
2. Right-click the blank area in the attachment screen
3. Click **New**
4. This will open your file explorer and allow you to locate the document you wish to attach
5. Select it and then click **Open**
6. Enter a name for the attachment
7. Click **OK**



Once saved into CareFree the attachment can be opened by double-clicking the link.

## Extras

These blank fields provide an area to hold any information that your business needs to record, that CareFree does not at this time have a specific field for.

The extra fields can be renamed in the items screen.

Data can be added to the fields by entering edit mode and simply typing.

**Should you find you are using the Extras fields to store a substantial amount of data, please contact CareFree support to discuss options for adapting your way of working**

## Notes

This allows the recording of any additional information in relation to the Carer. It is possible to print the contents of the notes tab by performing a right-click and selecting print.

## Contacts

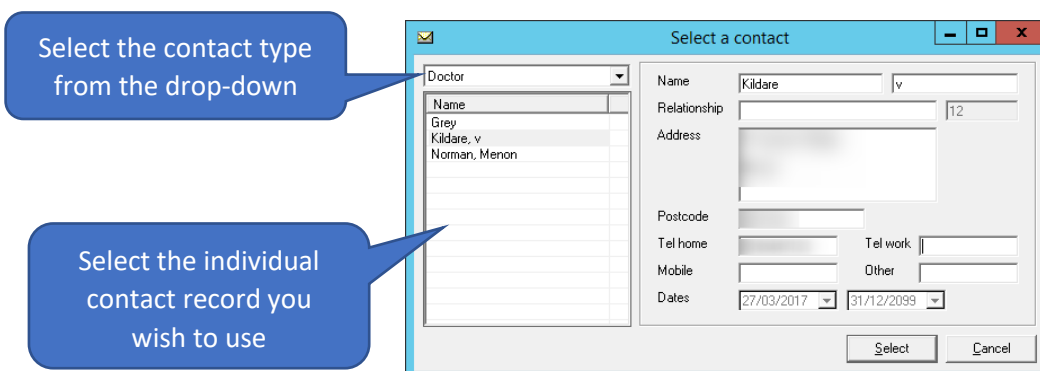
It is possible to store the contact information for different individuals or organisations that may need to be contacted in relation to a Carer or a Client.

### To Add a New Contact

1. Go to the **Contacts** tab
2. Click **Edit**
3. Right-click the blank area in the attachments screen
4. Click **New Contact**
5. Complete the details ensuring you specify an appropriate contact type using the drop-down menu

### To Create a Link to an Existing Contact

1. Go to the **Contacts** tab
2. Click **Edit**
3. Right-click the blank area in the attachment screen
4. Click **Include a Contact**
5. Go to the contact in the existing database select the relevant contact then press **Select**



## Holidays

The Holiday tab provides a screen containing two parts. The upper section is designed to automatically calculate the holiday entitlement of zero hours contract staff based on government guidance.

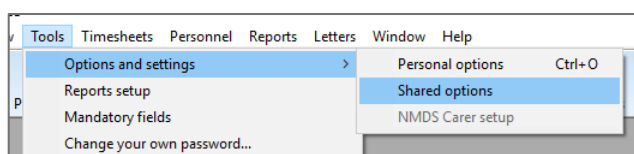
The parameters of the calculation which are used can be changed in the Options and Settings of CareFree. Figures are based on how many days/hours a Carer has worked over a specific number of weeks.

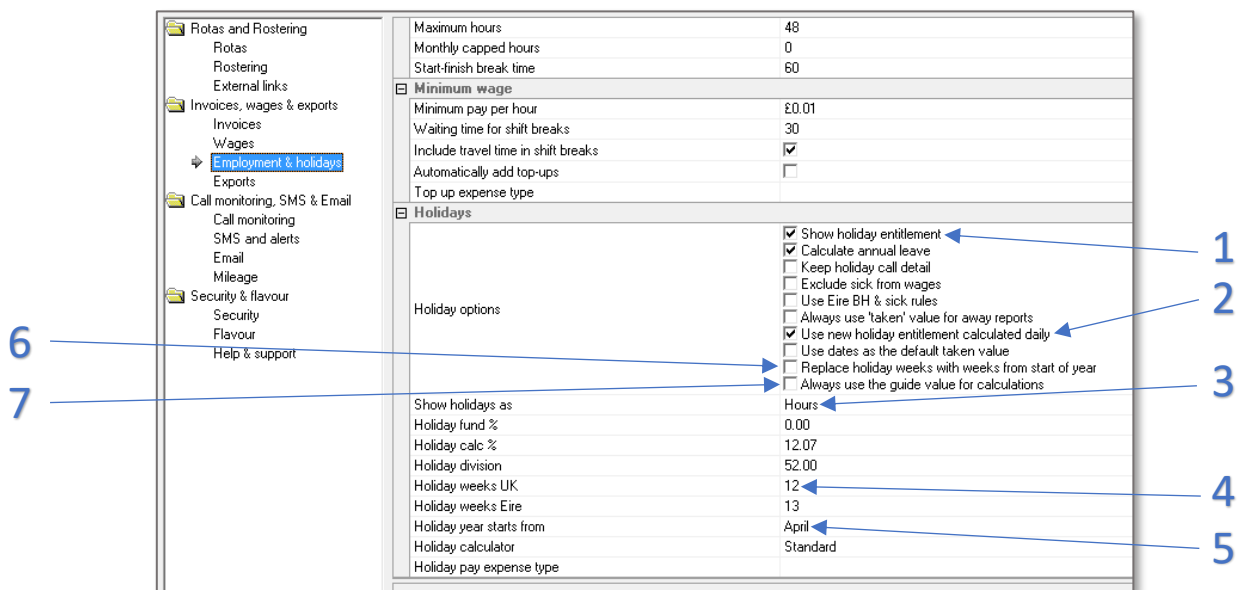
The method for using the calculator is slightly different depending on whether your organisation uses hours or days when calculating holiday entitlements.

Holiday Entitlement	
Working hours you wish to use in the calculation	178
Current holiday entitlement from January 2018 (4 hours x 12.07%)	0.42
Holidays taken this year	5.00
Balance remaining	-4.58

## Configuring the Holiday Entitlement Calculator

1. Go to **Tools**
2. Click **Options and Settings**
3. Click **Shared Options**
4. In the menu options on the left-hand side of the screen click **Employment & Holidays**





1	Ensure <b>Calculate annual leave</b> is ticked
2	Ensure <b>Use new holiday entitlement calculated daily</b> is ticked
3	Specify whether your organisation calculates entitlements in days or hours using the <b>Show holidays as</b> option
4	Specify over how many weeks your organisation calculates holidays accrued (usually 13) in the <b>Holiday weeks UK</b> box
5	Select the month in which your holiday year starts using the <b>Holiday year starts</b> from option It is possible to request that the holiday year starts for each Carer either in their original start month with your organisation or in the month of their birthday
6	You can request that the holiday entitlement calculator looks back to the start of the holiday year rather than a fixed number of weeks To do this tick <b>Replace holiday weeks with weeks from the start of year</b>
7	If you don't wish to manually type in a value for the number of hours/days CareFree uses to make the holiday entitlement calculation place a tick in <b>Always use the guide value for calculations</b>

When you have configured the options you require, go back into the Carers screen to confirm the changes have been applied. You should notice that the layout of the calculator has been simplified to make the information easier to read.

## Using the Calculator for Hours Based Entitlements

If your organisation calculates holiday entitlements in hours, the government recommends that your employees accrue 12.07% of the total number of hours they have worked. The holiday calculator will display the total number of hours each employee has worked over a set number of weeks (based on the Holiday weeks UK figure specified in the options and settings).

Holiday Entitlement	
Working hours you wish to use in the calculation	178
Current holiday entitlement from January 2018 (4 hours x 12.07%)	0.42
Holidays taken this year	5.00
Balance remaining	-4.58

Holidays which have been added to the rota will feed through into the calculator here and automatically deduct from the entitlement

To show holiday entitlement accrued by the employee you will need to enter Edit mode and type in the number of hours you wish to use in this calculation box

## Using the Calculator for Days based Entitlements

For organisations that calculate holiday entitlement in days, the government states that workers are legally entitled to 5.6 weeks paid holiday per year. Most workers who work a 5-day week must receive 28 days paid annual leave per year. This is calculated by multiplying a normal week (5 days) by the annual entitlement of 5.6 weeks. A worker works 3 days a week. Their leave is calculated by multiplying 3 by 5.6, which comes to 16.8 days of annual paid leave. Statutory paid holiday entitlement is limited to 28 days. For this reason, our calculator limits the total number of days work per 7-day period to 5 days.

The calculator will identify the average number of days each employee has worked over a set number of weeks (based on the Holiday weeks UK figure you specified in the options and settings). It will use this figure to calculate how much holiday has been accrued by multiplying this figure by 5.6.

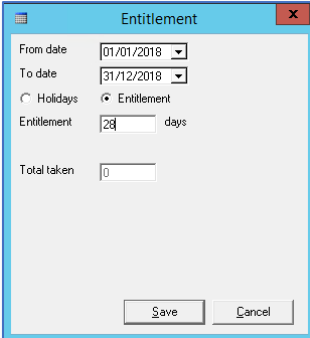
Holiday Entitlement	
Working days you wish to use in the calculation	5
Current holiday entitlement from January 2018 (5 days x 5.6)	28
Holidays taken this year	5.00
Balance remaining	23

Holidays which have been added to the rota will feed through into the calculator and will be deducted automatically from the remaining balance

If your organisation calculates holiday entitlements in a completely different way to government recommendations, or if your staff have set contracted hours, it is possible to use the holidays tab to track holiday entitlements but you will need to manually add the entitlement to the other half of the screen.

## To Manually Add Entitlement

1. Go to the **Holiday** tab
2. Click **Edit**
3. Right-click in the lower half of the screen and click **New**
4. Ensure the **Entitlement** radio button is checked
5. Specify the start and end date for the holiday year
6. Add the Carers entitlement in days or hours (the days/hours setting can be changed in options and settings)
7. Click **Save**
8. Click **OK** to save the entitlement on the Carers record



The screenshot shows a dialog box titled "Entitlement". It has a title bar with a close button (X). The dialog contains the following fields and controls:

- From date:** 01/01/2018 (dropdown menu)
- To date:** 31/12/2018 (dropdown menu)
- Radio buttons:**  Holidays,  Entitlement
- Entitlement:** 28 days (text input)
- Total taken:** 0 (text input)
- Buttons:** Save, Cancel

## **Payroll**

Payroll for each Carer will be based on the information contained within this tab. The **Role (pay)** field will control which pay rules will be applied to the individual Carer when calculating wages in CareFree.



The screenshot shows a software interface with a menu bar at the top containing: General, Other details, Qualifications, Wages, Security, Branches, Log, Attachments, Extras, Notes, Contacts, Holidays, Payroll, Outcomes, Sent box, Planner, History, and Continuity. The main area contains several form fields:

- 1:** Role (pay) dropdown menu showing 'G. Care Supervisor'.
- 2:** Pay scale dropdown menu showing '8. Care Worker'.
- 3:** Status dropdown menu showing 'Permanent'.
- 4:** Full time dropdown menu showing 'Part-time'.
- 5:** Bank details section with fields for 'TheBank', 'A/c name', 'TheBankAddress', 'AccountName', 'Sort code', 'Account no', and 'WF4 1XX'.
- 6:** Frequency dropdown menu showing '4 Weekly 33'.
- 7:** Pay type dropdown menu showing 'Standard by hour'.
- 8:** Recruitment dropdown menu showing 'Health sector'.
- 9:** Induction date & status dropdown menu showing '01/05/2006' and 'Induction complete'.
- 10:** Carer Certificate dropdown menu showing '03/06/2006' and 'Yes'.
- 11:** Other details table with rows for WTD Opt In/Out, Application form, Reference 1, Reference 2, Visa Expiry, Contract of Employment, Disclosure Risk Assessment, and Business insurance.

1	The role links to the CareFree pay rules – it is important to select the correct role for each Carer to ensure they are paid correctly
2	The status and full time drop-downs allow you to store additional information about the Carers status within the company
3	If a Carer originates from a different country an entry into the UK date can be stored in their record
4	A date can be entered to when the Carer started working in the care sector
5	Bank details for the Carer can be stored within this section
6	A frequency of pay can be recorded using this field
7	Carers can be paid by the hour (Standard by hour) or paid shift work (Start to Finish)
8	Recruitment can be used to store which work sector the Carer was recruited from
9	Information can be stored about the Carers induction
10	Information can be stored as to when the Carer received their care certificate
11	Other payroll information can be stored in these extra fields if necessary

## **Outcomes**

As part of an on-going process to meet requirements in relation to CQC's desire to understand the effectiveness of reablement care. This tab shows graphical data in relation to the variation in the amount of support being given to Clients. For Carers this may provide useful performance management information.

## **Sent Box**

The Sent box tab stores details of all messages sent to the selected Carer. These could be SMS or email messages sent from within CareFree.

## **History**

The History tab displays a record of all start and end dates. This is useful for organisations with Carers who regularly leave for extended periods of time and then return to employment (e.g. students doing holiday work or overseas workers who periodically return home).

## Planner

The Planner tab displays information relating to absences for the selected Carer. Whenever an away period is added to the Carers rota it will automatically be displayed in the planner tab. An absence planner code and planner back-colour must be specified for the relevant away reason in the items screen for the planner to display information.

In the example below any holidays that have been added to the rota are displaying in a yellow colour with the absence planner code 'H' showing. The example also shows any sickness absences the Carer has taken and also when they have been in training.

The screenshot displays the Planner interface with the following components:

- Navigation Bar:** Includes tabs for General, Other details, Qualifications, Wages, Security, Branches, Log, Attachments, Extras, Notes, Contacts, Holidays, Payroll, Outcomes, Sent box, Planner (selected), History, and Continuity.
- Calendar Grid:** Shows a monthly view of absences for 2018. Absences are color-coded: Sick (S, red), Training (T, blue), and Holiday (H, yellow).
- Summary Table:**

Code	Name	Days	Taken (Hours)	Instances
S	Sickness	3	0.00	2
T	Training	7	0.00	1
H	Holiday	10	0.00	1
- Navigation Controls:** A bar at the bottom shows the current month range as 'Jan 2018 - Dec 2018' and a 'Preview' dropdown menu.

Annotations in the image:

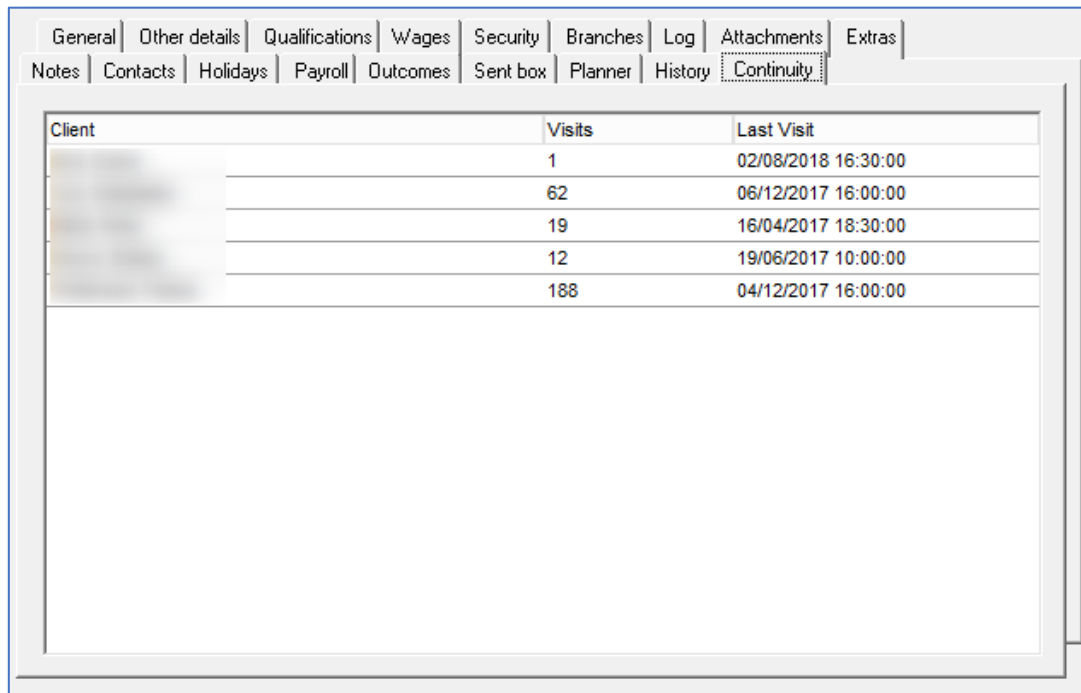
- 1:** Points to the color-coded absence markers in the calendar grid.
- 2:** Points to the summary table below the calendar.
- 3:** Points to the navigation bar at the bottom.

- |   |  |
|---|--|
| 1 | Colours and codes must be specified for away reasons in the items screen |
| 2 | Away reasons and the number of days taken are listed below the planner   |
| 3 | Use the arrow controls to navigate through the months of the year        |

## Continuity

The Continuity tab displays information based on the information on each Carers rota. Users will be able to see:

- Which Clients a Carer has visited
- The number of visits made by the Carer to each Client
- The date and time of the last visit the Carer made to each Client

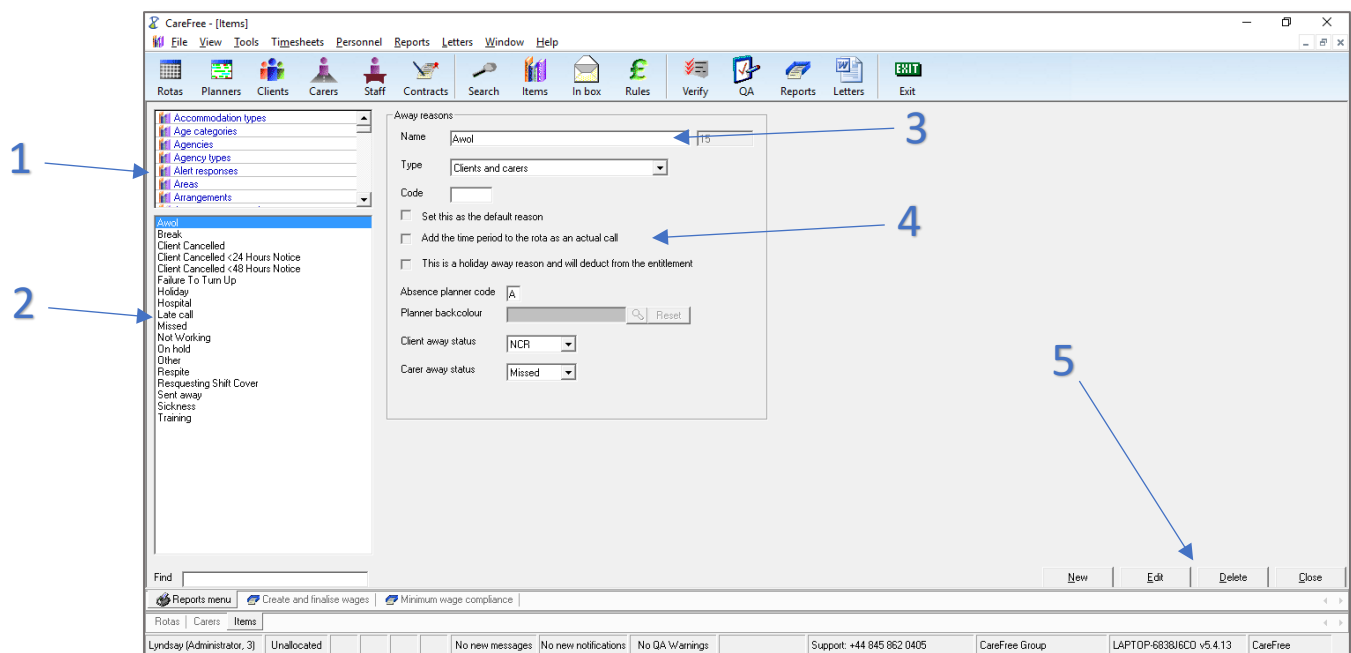


Client	Visits	Last Visit
	1	02/08/2018 16:30:00
	62	06/12/2017 16:00:00
	19	16/04/2017 18:30:00
	12	19/06/2017 10:00:00
	188	04/12/2017 16:00:00

The Continuity tab looks for any calls with the status completed in the past and shows the planned time of the last visit

# The Items Screen

Throughout CareFree you will see many different lists and option selection screens which can be used to populate fields with information. Rather than these lists being fixed with terminology created by our developers the software allows you to populate your own lists and as such use your own wording and titles for the items you require. This means that you can tailor the software to suit your organisations specific needs.



1	Select the list you wish to view or amend in this box
2	Select an item to amend within a list here or simply review the current items
3	The name of the item being added/amended in the list is displayed here
4	Additional information or options can be specified for some items here
5	Use the action buttons to add new items or edit/delete existing items

## Making Changes to Existing Items

1. Select the correct list in the box in the top right-hand corner of the screen
2. Select the item you wish to amend in the box in the lower left section of your screen
3. Click the **Edit** and then make the changes to the item on the main part of the screen
4. Confirm your changes by clicking **OK** or discard them by clicking **Cancel**

## Adding New Items

1. Click **New**
2. Give the new item a name
3. Specify any options/settings required for the item on the main part of the screen
4. Confirm your changes by clicking **OK** or discard them by clicking **Cancel**

Once finished the items screen can be closed. When you look again in the drop-down list it may not have appeared to have changed. In order to make the changes visible you may need to select **Refresh** or close down and re-open the screen.

In order to navigate quickly to the list you require, click once in the list and then press the letter key on your keyboard that matches the entry you are searching for e.g. press 'T' to jump to lists begin with the letter T such as Transport types

It is essential that those implementing CareFree for the first time spend some time setting up Items lists to match business requirements. By default, CareFree comes with some entries in most of the lists but take some time to check that these match your organisations requirements

# The Clients Screen

The Clients screen contains many of the same features as the Carers screen and can be used in a very similar way.

## Clients Screen Tabs

### General

In this tab the majority of fields are identical to those on the Carers screen. There are some differences:

- In order to help you further personalise the care you provide there is a field named 'Also known as' to record a different name as used by your Client
- The entry method field allows detailed information as to how to gain access to a Client to be stored ready for quick access should a Carer require them and call the office. Key safe numbers can also be recorded
- Social services reference numbers should be stored in the SS Ref field

## Other Details

This screen contains several of the same fields as the Carer screen tab of the same name. In particular the start date and end date fields can be used to define an active and inactive status for a record.

The screenshot shows a software interface for 'Other Details'. At the top, there are several tabs: 'Needs & skills', 'Warnings', 'History', 'Budget', 'Outcomes', 'Sent box', 'Continuity', 'Personalisation', 'General', 'Other details', 'Contracts', 'Invoices', 'Contacts', 'Log', 'Attachments', 'Extras', 'Notes', and 'Agreements'. The 'Other details' tab is active. The form contains the following fields:

- 1** points to the 'Company' dropdown menu, which is set to 'New Test Company'.
- 2** points to the 'Main Carer' dropdown menu, which is set to '(None)'.
- 3** points to the 'MAR format' dropdown menu, which is set to 'Pharmacy MAR sheet'.
- 4** points to the 'Categories' section at the bottom, which includes 'Dependency' (0), 'Services' (0), and 'Support Networks' (0).
- 5** points to the 'Personalisation' tab.
- 6** points to the 'Start date' dropdown menu, which is set to '13/03/2013'.
- 7** points to the 'Mileage type' dropdown menu, which is set to '(None)'.
- 8** points to the 'Risk type' dropdown menu, which is set to 'B-Medium'.

Other visible fields include 'Branch' (New Test Company 3), 'RoadRunner Tag' (empty), 'Housing scheme' (Own Home), 'Accommodation' (Bungalow), 'Client type' (PD - Physical Disability), 'Charge Band' (Private), 'Cost Centre' (empty), 'Email' (empty), 'Pass ID' (empty), 'NHS No' (empty), 'Estimated end date' (31/12/2099), 'Reason' (None), and 'Variation date' (empty).

1	Clients can only belong to one <b>Branch</b>
2	The <b>Main Carer</b> is the principle provider of the care to the Client
3	This field stores details about the Clients <b>Medical Administration Record (MAR)</b>
4	These fields record information for the <b>National Minimum Data Set (NMDS)</b>
5	Add personalised notes to tasks \ needs for a Client here
6	See <a href="#">page 15</a> for more information about <b>Start Date</b> and <b>End Date</b>
7	<b>Mileage</b> charges can be applied to individual Clients using these fields
8	A <b>Risk Type</b> can be specified for each Client – this information can be fed through into the rota



## Contracts

This tab is covered in more detail in the next section on [page 45](#) as it determines who will pay for any care provided to a Client.

## Invoices

The Invoices tab will contain a record of all previously finalised invoices for the Client. This can be used to review previous invoices or to unfinalise them should changes be required after invoices have been run.

## Contacts

Functions in exactly the same way as for the Carers screen please refer to [page 27](#) for details.

## Log

Functions in exactly the same way as for the Carers screen please refer to [page 21](#) for details.

## Attachments

Functions in exactly the same way as for the Carers screen please refer to [page 26](#) for details.

## Extras

Functions in exactly the same way as for the Carers screen please refer to [page 26](#) for details.

## Notes

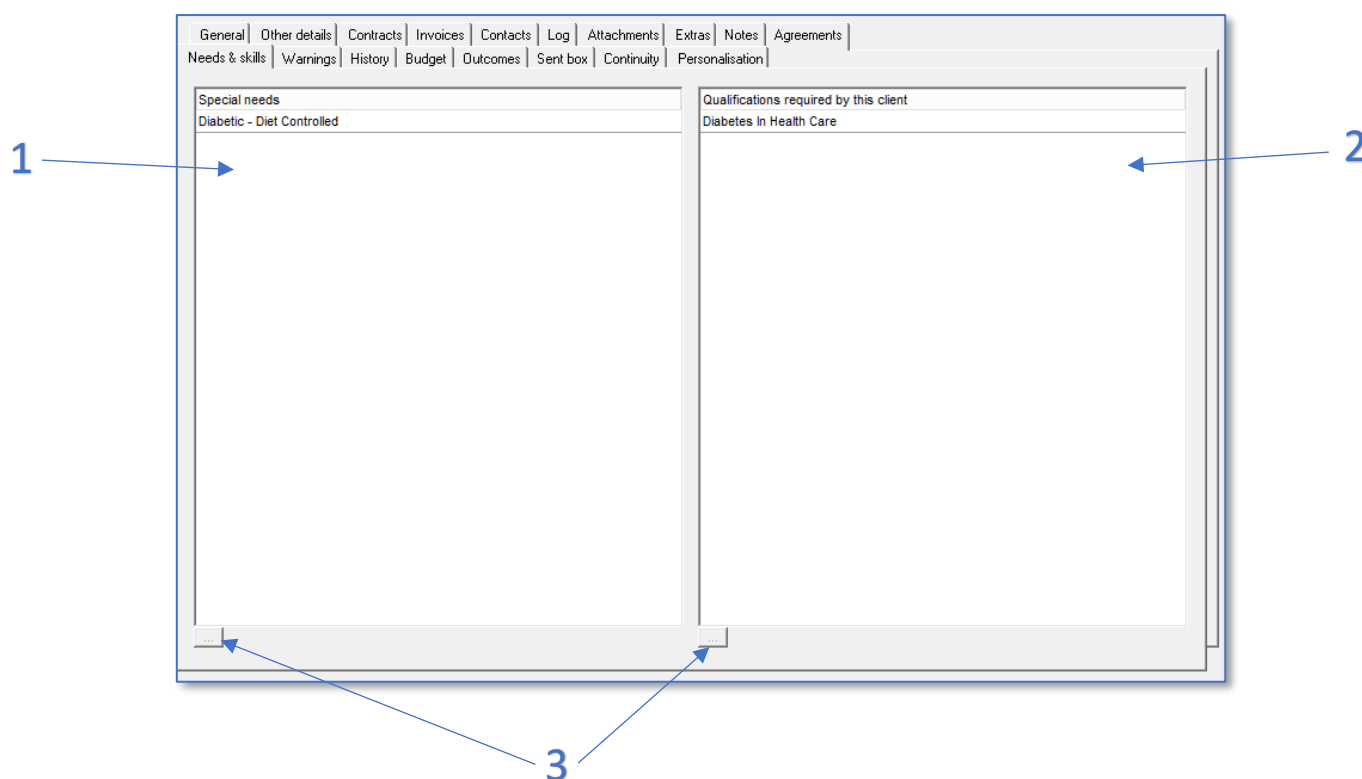
Here the Notes page is split in two sections with the lower section providing a space for general notes in much the same way as the Carers screen. The package notes section can provide a summary of packages of care created by the package wizard providing a specific tick box is ticked when a package is created. Please refer to [page 58](#) to read more information about the package wizard.

## Agreements

This has been designed to support the large-scale import of data from specific third-party software platforms primarily those used by local authorities.

## Needs & Skills

It is possible to record any requirements that a Client may have along with the relevant qualifications required by the Carer to visit the Client.



- |   |   |
|---|---|
| 1 | Store the Clients <b>Special Needs</b> into this list                                     |
| 2 | Store the <b>Qualifications</b> required for the Carer to visit the Client into this list |
| 3 | Use these buttons to add into either list   |

If an item you require is missing from either of these lists go to the items screen and use the special needs list and qualifications list to add new items or edit existing items

## Warnings

With some Clients you may wish to have a visible warning appear on screen whenever their record is selected.

In edit mode click the  icon to select the chosen warning from the list.

Further warnings can be added within the items screen.

## Budget

With the increasing use of direct payments this feature allows the monitoring and management of a Clients budget.

### To Create a New Budget Entry

1. Click on the budget tab and click **Edit**
2. Right-click and select **New**
3. Add a **Deposit** to the balance amount

Finalised invoices will then reduce this amount by acting as a withdrawal. Additional manual withdrawals can be made if required in the same way as a deposit but by selecting the withdrawal option.

## Outcomes

This tab provides graphical analysis of the hours of care and the activities conducted for the Client.

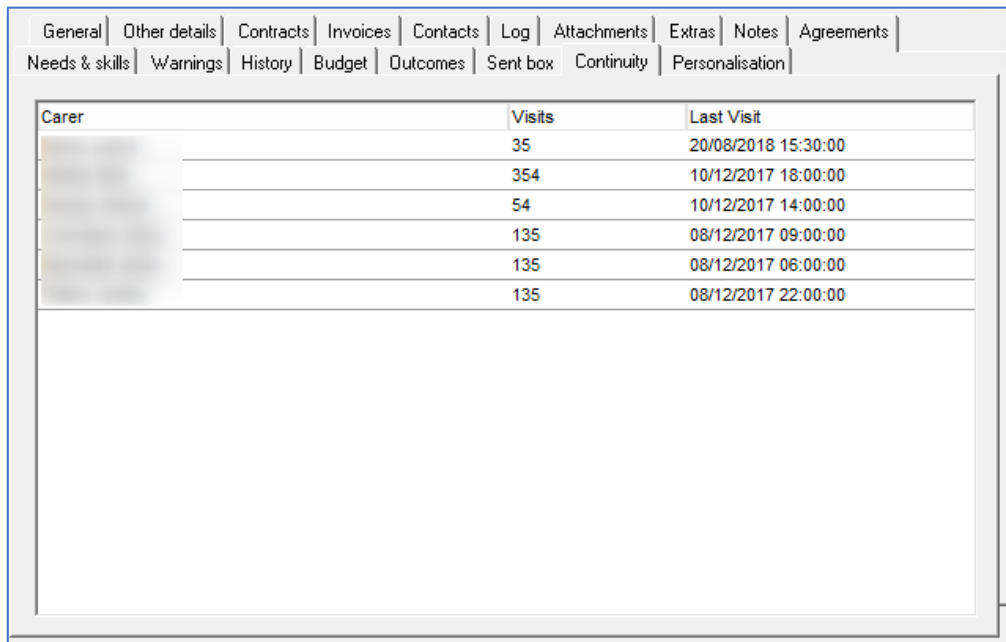
## Sent Box

The Sent box tab stores details of all messages sent to the selected Client. These could be SMS messages or email messages sent from within CareFree including messages created as part of a mail merge.

## Continuity

The Continuity tab displays information based on the information on each Carers rota. Users will be able to see:

- Which Carers have visited the Client
- The number of visits made by each Carer
- The date and time of the last visit each Carer made



Carer	Visits	Last Visit
	35	20/08/2018 15:30:00
	354	10/12/2017 18:00:00
	54	10/12/2017 14:00:00
	135	08/12/2017 09:00:00
	135	08/12/2017 06:00:00
	135	08/12/2017 22:00:00

The continuity tab looks for any calls with the status completed in the past and shows the planned time of the last visit

# Contracts

The billing details for any care delivered to a Client is stored in their contract. It is possible for Clients to have multiple contracts if payments for their care are split between more than one source e.g. part Social services and part private.

Contracts can be broken down into several different types but by default CareFree is set up with social services and private contract types. More contract types can be added to CareFree in the items screen.

## How Contracts Work

Within CareFree the Client is the individual who receives the care. This does not necessarily mean that they are the person to whom the invoice is sent to. In CareFree, the person who receives the invoice is referred to as the customer. Whether this customer is responsible for handling the invoices of several Clients will often dictate the type of contract that you are going to set up.

- For example, a social services contract will often be attached to a number of Clients because their invoices can all be sent to the same customer at the same address
- If the invoice for a particular package of care or part of a package of care is to be invoiced to a different customer address then a different contract is required
- If the customer is only being invoiced for the care provision of a single Client then this will usually be a private or a direct payment type of contract
- It is possible to create several different contracts which all have the same customer attached. This can happen under social services contracts where there are many different charge rates and classifications of care but all bills are sent to the same central address (customer)

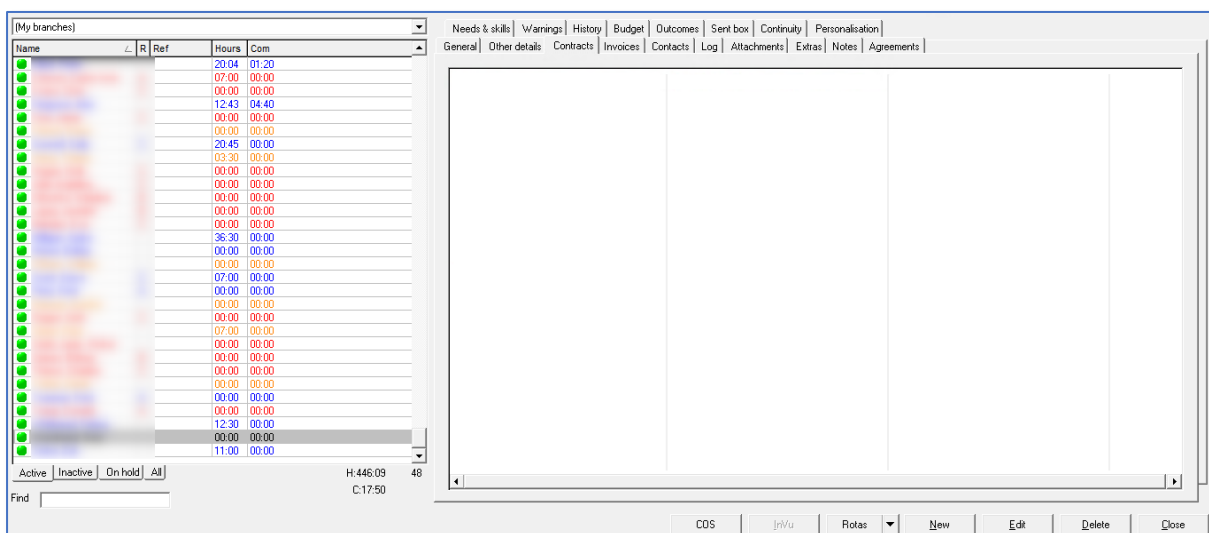
## Adding a New Contract

There are two methods in which contracts can be added to CareFree.

- By adding a contract directly into the Client screen through the contracts tab (usually used for private contracts which will be unique to the individual Client)
- Using the dedicated contracts screen (usually used for contracts which will be shared by multiple Clients)

The contracts screen is particularly useful when looking at amending the details on existing contracts or creating blanket contracts which will be shared by numerous Clients. If a Client will be paying for their care directly it is easier to create a unique private contract using the contracts tab in the Client screen.

## Using the Clients Contracts tab to Create a Private Contract



1. Go to the contracts tab in the Clients screen
2. Click **Edit**
3. Right-click in the white area on the contracts tab
4. Select **New Contract**
5. This will launch the New Contract Wizard
6. The Wizard follows either three or four steps dependant on whether the Client already has an existing contract and packages of care.

## Step One

Selecting the top option **Use the wizard to help you** will allow creation of a unique contract for the Client e.g. private contract.

The second option **Use the contract maintenance screen** launches the contracts screen and is used primarily for creating a new blanket contracts that will cover more than one Client e.g. social services contract.

Click **Next** to continue.

A screenshot of a software dialog box titled "New contract wizard". The window has a title bar with a close button (X) on the right. The main content area is titled "Step 1 - How do you want to create the contract?". There are two radio button options. The first option, "Use the wizard to help you", is selected and has a mouse cursor hovering over it. Below this option is the text: "Ideal for creating contracts personal to this client, for example, a private contract". The second option is "Use the contract maintenance screen", with the text: "Commonly used to create contracts that will cover many clients, for example, Social Service contracts". At the bottom of the dialog are three buttons: "Cancel", "< Back", and "Next >".

## Step Two

Step two allows you to set the information regarding who will be invoiced for the contract.

If this is the Client themselves then the details will already be populated. Should this be anyone different then their details should be entered here.

If the customer is already in CareFree use the **Select Customer** drop-down box to select this customer.


Click **Next** to continue.

A screenshot of a software dialog box titled "New contract wizard". The window has a title bar with a close button (X) on the right. The main content area is titled "Step 2 - Create the customer from the main details". It contains several form fields: "Select Customer" (a dropdown menu with "(None)" selected), "Customer or Full name" (a text input field), "Address" (a 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 with "(None)" selected), "V.A.T. rate" (a dropdown menu with "Zero rated" selected), and "Invoice prefix" (a text input field). At the bottom are three buttons: "Cancel", "< Back", and "Next >".

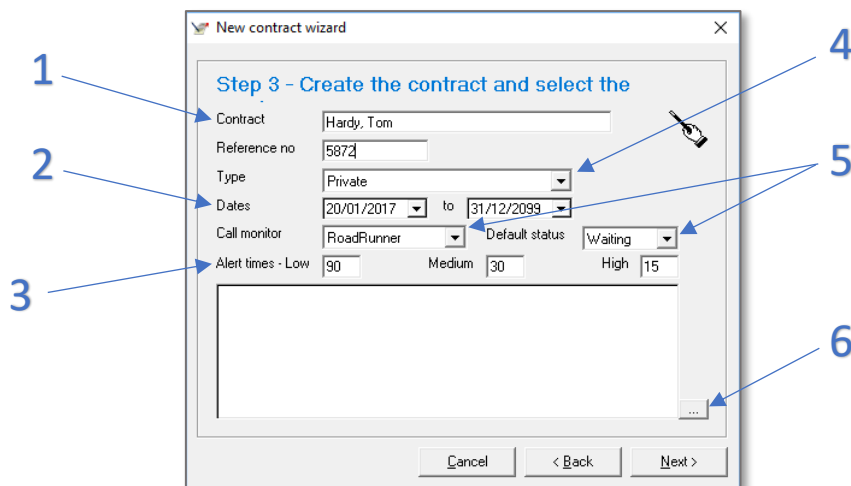
The customer is the person who will be paying the invoice. Enter their details here if the Client will not be paying their own invoices

### Step Three

During this step you can give the contract a name as well as selecting the contract type e.g. private, direct payment etc. You can also specify start and end dates for the contract and apply settings for electronic call monitoring if required.

Using the  icon will allow you to attach a list of possible care needs which may be added to care packages under this contract. It is good practice to attach all the needs at this step as a Clients requirement may change over time.

Click **Next** to continue. It is important to note that you will only ever invoice for the needs that you deliver.



1	Name the contract using a clear and consistent method here. Where there are similar contracts it will help to tell them apart
2	Specify a start and end date. If no end date is known leave as the default system end date
3	Specify alert times for call monitoring if they need to be different to default alert times
4	Specify the contract type
5	Choose a call monitoring type if required and set the default call status
6	Add the care needs to the contract using this button


It may be that if the Client has no existing contracts or calls in the system that step three is the final step. In which case click **Finish** to complete the Wizard.

If the Client has other contracts and existing packages of care then click **Next** to continue to step four.



## **Step Four**

If the new contract is replacing an existing contract this step will allow you to quickly swap all calls currently listed against the existing contract to the new contract you have just created. It will also allow you to choose the start date of the new contract.

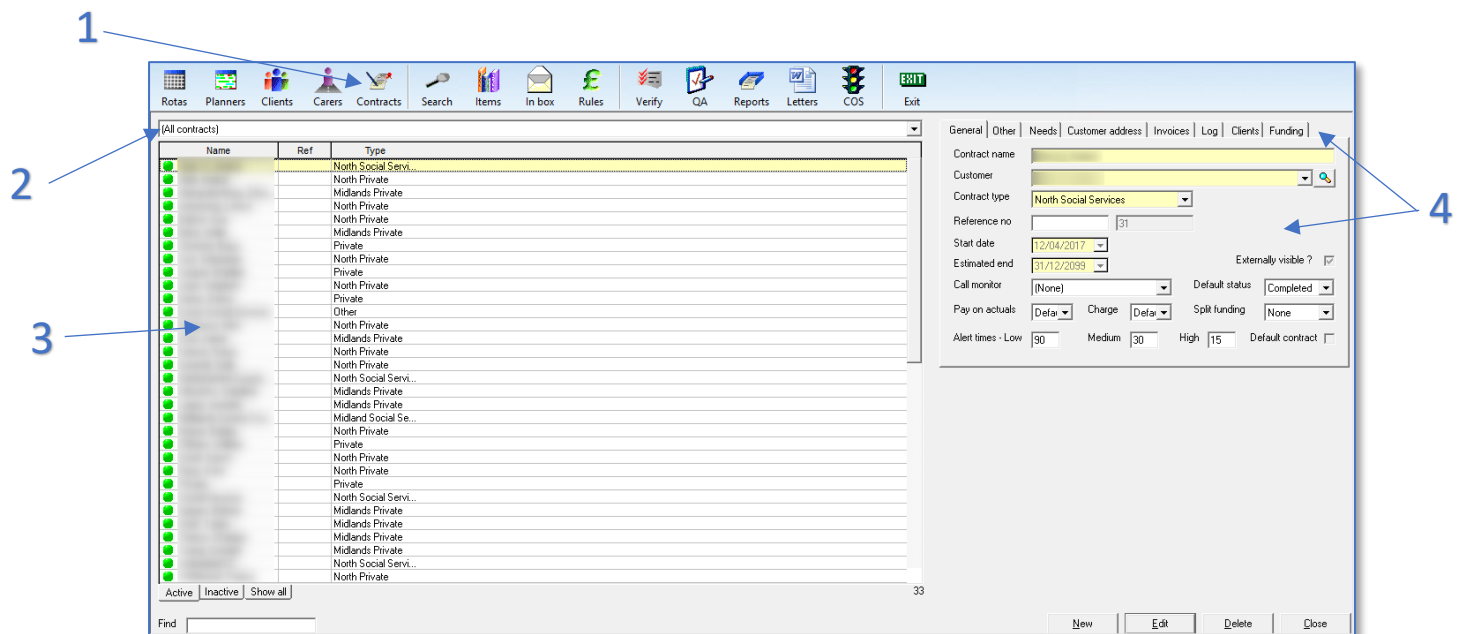


The screenshot shows a dialog box titled "New contract wizard" with a close button (X) in the top right corner. The main heading is "Step 4 - swap calls to this new contract". Below this, the question "Would you like to swap calls for existing contracts to this new one?" is displayed. There are two radio button options: "No thanks" (which is selected) and "Yes, swap the following from this date:". Under the "Yes" option, there is a list box containing one item, "Leeds City Council", which is checked. Below the list box, there is a label "Week commencing" followed by a date input field showing "20/01/2017" and a dropdown menu currently set to "Monday". At the bottom of the dialog, there are three buttons: "Cancel", "< Back", and "Finish >".

Click **Finish** to confirm the creation of the new contract with **No thanks** selected. To swap select **Yes, swap the following from this date** then click **Finish**.

The new contract should now appear in the list on the Client screen contract tab.

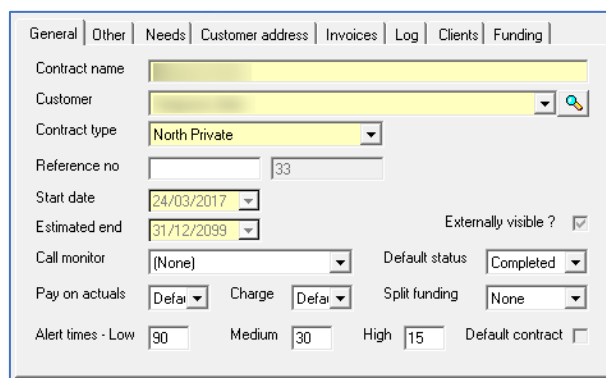
# Using the Contracts Screen to Create New Shared/Blanket Contracts



1	The contracts screen is accessed by clicking this button
2	Choose to view specific contract types by using the drop-down list
3	Existing contracts are listed here
4	Contract details are entered in the fields and tabs here


## Creating a New Contract in the Contracts Screen

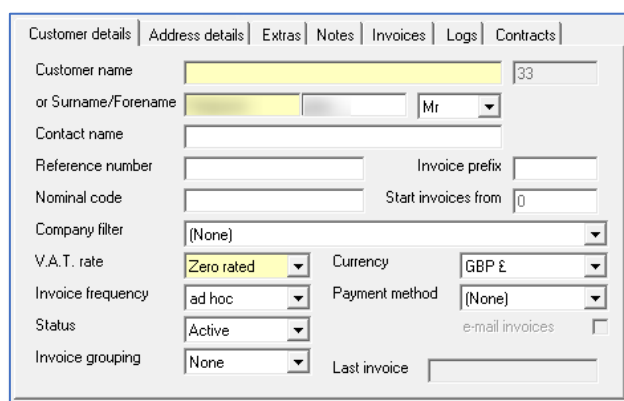
1. Click **New**
2. Give the contract an appropriate **Name**
3. Select the appropriate **Contract Type**
4. Specify the **Start Date**
5. Choose the **Call Monitoring** type if required



The screenshot shows the 'Contracts' screen with the following fields and values:

- Contract name: [Empty]
- Customer: [Empty]
- Contract type: North Private
- Reference no: 33
- Start date: 24/03/2017
- Estimated end: 31/12/2099
- Externally visible?:
- Call monitor: (None)
- Default status: Completed
- Pay on actuals: Defar
- Charge: Defar
- Split funding: None
- Alert times - Low: 90, Medium: 30, High: 15
- Default contract:

6. Select the appropriate default **Call Status**. If there is no call monitoring the default is usually set to **Completed**. If call monitoring is used the default status is usually set to **Waiting**
7. Go to the **Needs** tab and select all needs in the list
8. If the customer who will receive the invoices for this contract has already been added to the database use the customer drop-down box to select from the list
9. If a new customer needs to be added use the  icon. This will take you into the customer screen
10. The customer screen follows the same principles as most of the other screens within CareFree. Click **New** to create a new customer and fill in all the relevant details using the tabs and fields as shown below



The screenshot shows the 'Customer details' screen with the following fields and values:

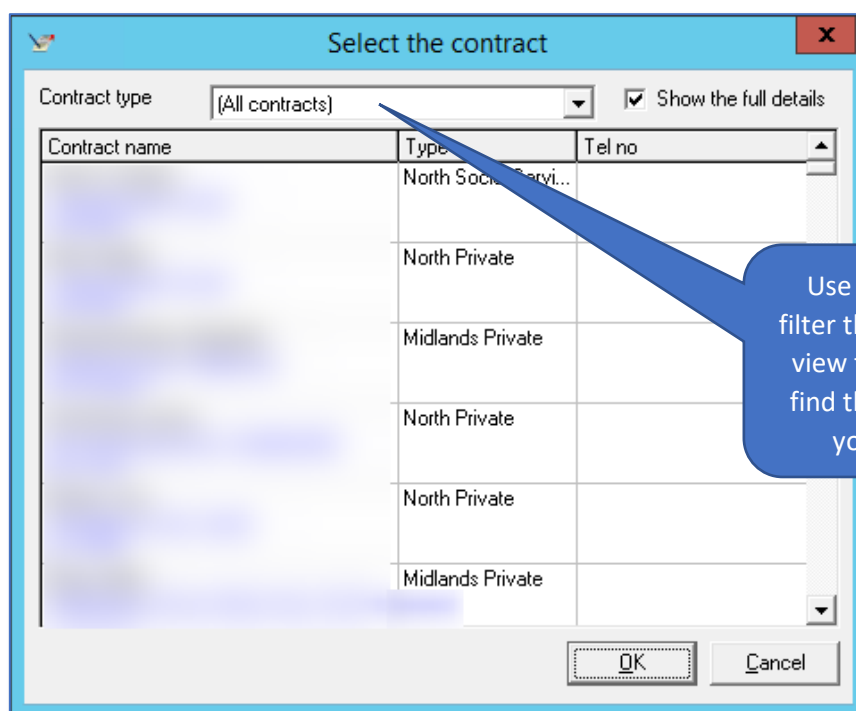
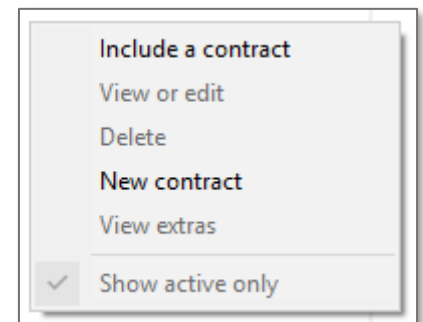
- Customer name: [Empty]
- or Surname/Forename: [Empty] Mr
- Contact name: [Empty]
- Reference number: [Empty]
- Nominal code: [Empty]
- Company filter: (None)
- V.A.T. rate: Zero rated
- Invoice frequency: ad hoc
- Status: Active
- Invoice grouping: None
- Currency: GBP £
- Payment method: (None)
- e-mail invoices:
- Last invoice: [Empty]

11. Once the customer details have been added click **OK** then **Select**
12. Click **OK** to save the new contract

## Including a Shared/Blanket Contract on a Clients Record

Once a shared/blanket contract has been created within the contracts screen it will be available for inclusion within any Clients contract tab. To include a shared/blanket contract on a Clients record open the Clients screen, locate the Client in the list and go to their contracts tab.

1. Click **Edit**
2. Right-click in the white box on the contracts tab
3. Select **Include a contract**
4. Go to the contract you wish to include
5. Select the contract you wish to include and click **OK**



# Clients & Carers Preferences

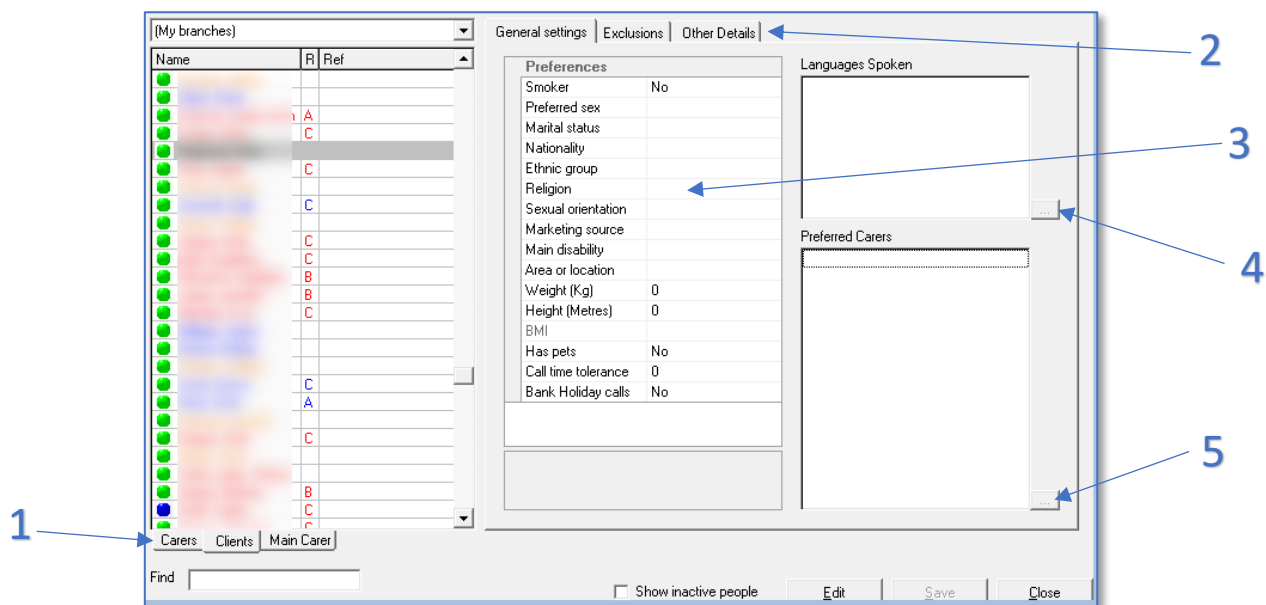
Within CareFree you have the ability to set preferences and exclusions for both your Clients and Carers. Preferences will feed into the rota and ensure the best matches between Clients and Carers are made when allocating resources and delivering care.

The information specified within the Client and Carer preferences screen feeds into CareFree's AQAA report.

## Accessing Client/Carer Preferences

Click on the view menu at the top of any CareFree screen and then select either Client or Carer and from the sub menu select preferences.

Alternatively, from the Client or Carer screen click on the drop-down arrow to the right of the rotas action button and select preferences.



1	Choose to view the preferences and exclusions for either Carers, Clients or main Carers here
2	Use these tabs to view <b>Preferences</b> , <b>Exclusions</b> and <b>Other Details</b> for Clients
3	Preferences can be specified here after entering <b>Edit</b> mode
4	<b>Languages Spoken</b> can be chosen. This will feed through into allocation screen
5	<b>Preferred Carers</b> can be chosen for a Client. This will feed through into the allocate screen

## General Settings

It is important to remember that setting preferences and exclusions will not prevent co-ordinators allocating Carers to Clients whose preferences do not match.

CareFree can be set to provide on screen warnings where clashes occur but preferences and exclusions are simply meant to help prioritise Carers and provide guidance and improve the care services your organisation delivers. The ultimate control remains with the co-ordinators. If your resources are stretched and you are short staffed you will still be able to allocate Carers to Clients whose preferences do not match.

To make changes to the preferences for both Clients and Carers you must first enter edit mode. Some of the preferences fields contain drop-down lists which can be updated in the items screen. The majority of the preferences are self-explanatory but a few are described below:

### Carers

- **Smoke Free** – Does the Carer prefer to work in a smoke free environment?
- **Preferred Sex** – Does the Carer prefer to work with Clients of the same sex?
- **Maximum Distance** – How far is the Carer prepared to travel from their home?
- **Marketing Source** – Where did the Carer hear about your organisation?

### Clients

- **Marketing Source** – How was the Client referred to your organisation?
- **Main Disability** – What is the Clients main impairment?
- **Area or Location** – For reporting purposes, where is the Client located?
- **Weight/Height** – the Clients BMI is automatically calculated when weight and height is entered to help plan for moving and handling
- **Has Pets** – some Carers prefer not to work with Clients who have pets

## Exclusions

To add exclusions for both Clients and Carers you must first enter edit mode.

### What do Exclusions do?

The next time you are in the allocation screen you will see that the Client/Carer which you have marked the exclusion against will be highlighted in red text with the column 7 (not excluded by Client) crossed – indicating the exclusion. The system will still allow you to override the exclusion and allocated this call if absolutely required in times when you have no alternative Carer to provide cover for the call.

Name	Phone no	1	2	3	4	5	6	7	8	9	Miles	Time	Hours	Transport
		✓	✓	✓	✓	✓	✓	✓	✓	✓	2.9m	Home	0-48-0	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	5.1m	Home	0-48-42	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	21.1m	Home	0-16-9	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	23.9m	Home	0-48-35	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	12.7m	Home	0-48-1	Car Share
		✓	✓	✓	✓	✓	✓	✓	✓	✓	14.1m	Home	0-16-0	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	30.0m	Home	0-48-0	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	30.0m	Home	0-48-0	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	11:00	0-48-68.5	Dwn car	
		✓	✓	✓	✓	✓	✓	✓	✓	✓	11:30	0-48-1	Dwn car	
		✓	✓	✓	✓	✓	✓	✓	✓	✓	11:30	20-48-33.25	Dwn car	
		✓	✓	✓	✓	✓	✓	✓	✓	✓	4.5m	Home	30-48-4	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	12.7m	Home	16-48-0	Car Share
		✓	✓	✓	✓	✓	✓	✓	✓	✓	3.9m	11:00	20-48-12.5	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	23.8m	Home	20-48-0	Dwn car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	17.2m	Home	0-48-0	Dwn car

### Carers Exclusions

It is possible to specify both Clients and Carers with whom the selected Carer would prefer not to work with. This helps to avoid pairing Carers inappropriately on double up calls.

1. Select the **Exclusions** tab
2. Click on the **+** button to make your changes to access the exclusions box for either Clients or other Carers

General settings | **Exclusions** | Other Details

Clients this carer does NOT want to visit

Name	Reason

+  
-  
✕

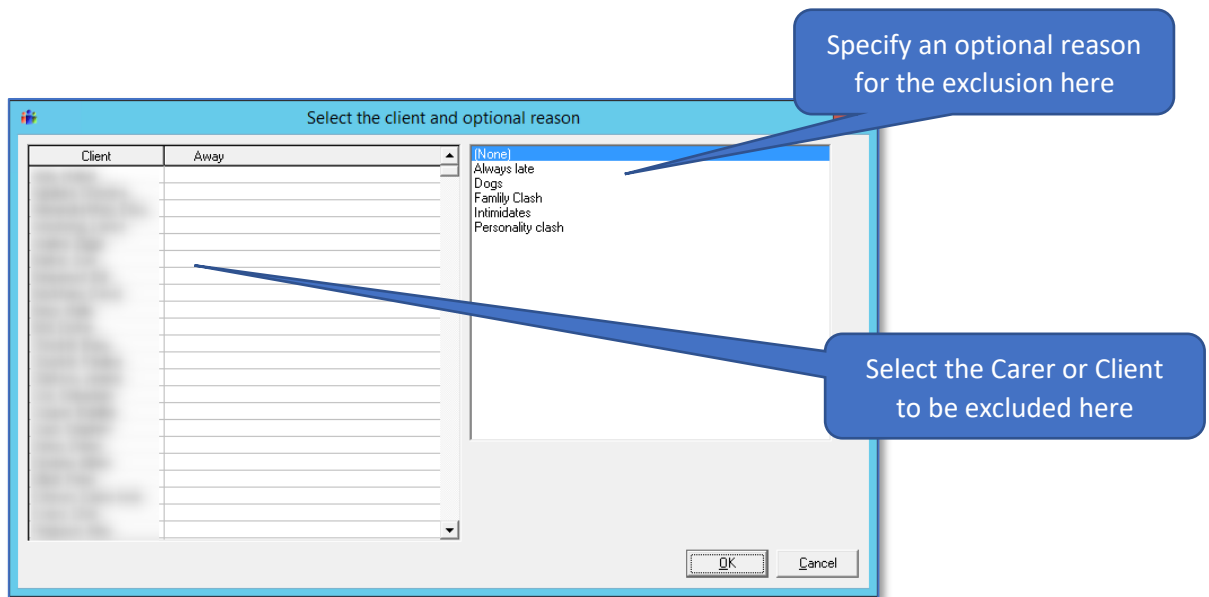
Other carers who cannot work with this carer

Name	Reason

+  
-  
✕

Click here to specify Clients the Carer does not want to visit

Click here to specify Carers the Carer does not want to work with

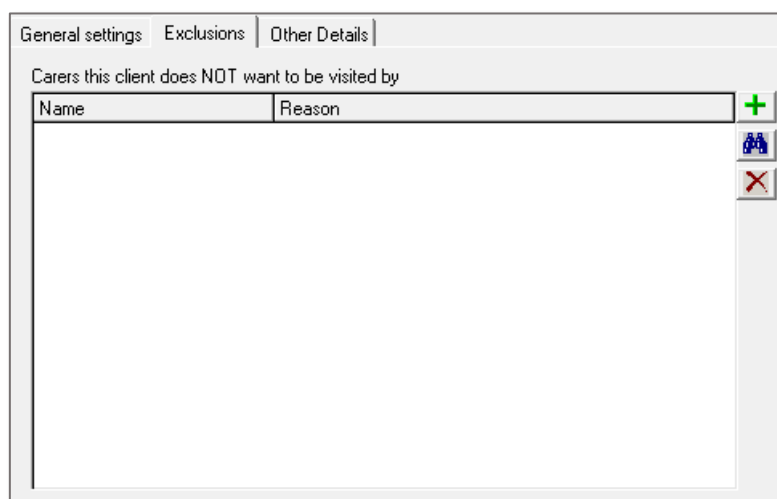


3. Click on the required individual to exclude and highlight the reason for the exclusion. Once you have selected the individual to apply the exclusion to and the reason click **OK**

You can add further exclusion reasons by going to the items screen and amending the exclusion reasons list.

## Clients Exclusions

Exclusions are added in exactly the same way as for Carers except Clients only have the option to exclude Carers.





# Packages of Care

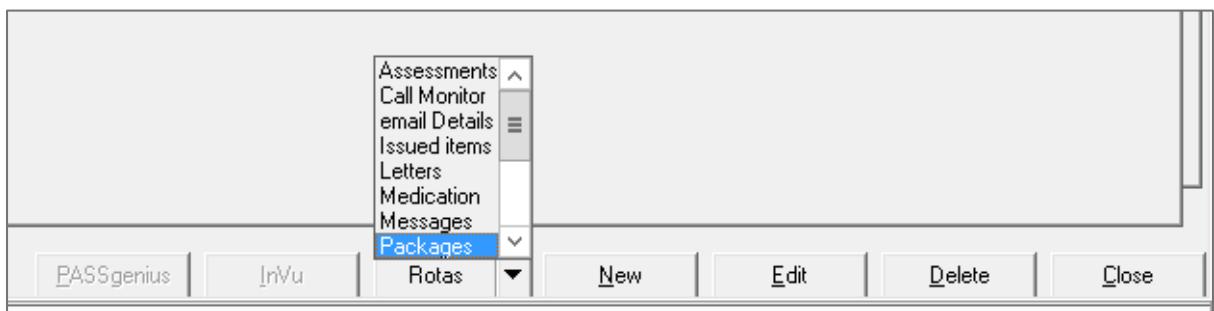
In CareFree a package of care is a series of calls created on a Clients rota which form the basis of the care services your organisation is providing for them.

You must add or include a contract on a Clients record before you can create a package of care

## Creating a Package of Care

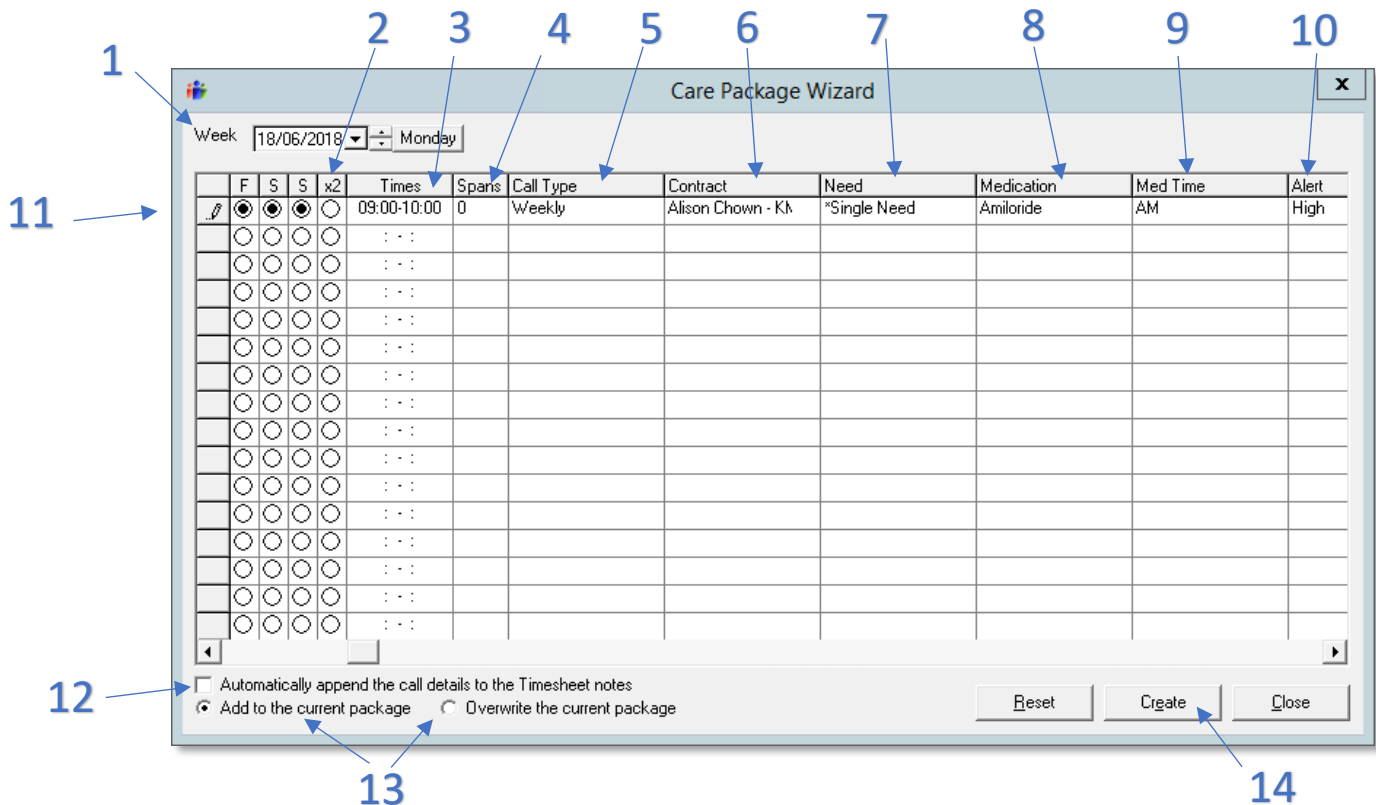
This is best achieved using the Care Package Wizard. To launch the Wizard:

1. Open the **Clients** screen
2. Select the Client for whom you wish to create a package of care
3. Click on the drop-down arrow next to the rotas button
4. Select **Packages** in the list



# Care Package Wizard

The Package Wizard is designed to simplify the process of adding the initial package of care in CareFree. It should provide the basis for the care that will be provided in the future for a Client and should be the generic template to which calls can be added, removed or amended.

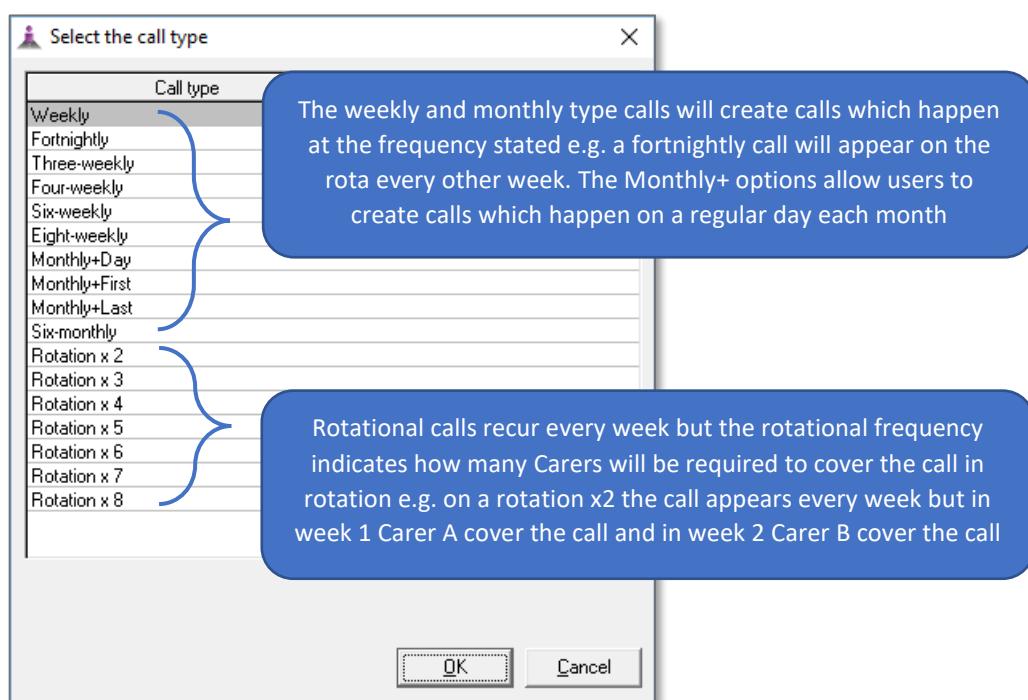


1	Specify the start date for the care package being created
2	x2 marker denotes a double up call requiring 2 Carers
3	Choose the call times here using a 24-hour clock with no space or dashes etc.
4	Spans can be used to create calls which span several days (24/7 live in or sleeping nights)
5	Call type specified here
6	Calls can be allocated against different contracts if multiple contracts have been created
7	The Client's needs for each call are selected here
8	Highlight medication requirements for each call here
9	Add a time to take the medication (this links to the Client MAR details form)
10	Specify risk category for electronic call monitoring alerts if required
11	Set the pattern of calls throughout the week. Each new line represents a new call
12	Package details will be added to Client notes tab if this box is ticked
13	Either add the package to the existing calls on the rota or replace them by selecting overwrite
14	Click <b>Create</b> when all calls have been added to the package wizard

Right-click on the pencil at the left hand side of the dots to quickly select from a range of choices

## Call Types

Selecting the correct call type allows the call to display at the correct time intervals going forward in the rota.



## Allocating a Carer on the Package Wizard

Allocating a Carer at this stage would then mean that the Carer was allocated to these calls indefinitely. The option to allocate a Carer at this stage should only generally be used where a Carer has been brought on board to cover an individual Client. By leaving this field blank the calls will be added to the rota as unallocated and can be easily managed from within the rota screen.

## Alert

By specifying a risk category for the call under alert you will determine the no show alert time for electronic call monitoring. See [page 70](#) for more information on call alerts.

## Other Fields

The remaining fields provide an opportunity to detail specific Carers to be used dependant on the call type however, the same caution should be exercised as the first Carer field. There is also a field which allows series of calls to be added to a run. By scrolling to the right further fields become available.

## Reset, Create and Close

- Using the **Reset** button simply clears the information that you have entered into the Wizard
- Using the **Create** button will start the process of creating the package of care for the Client. You will be asked to confirm that you wish to proceed and it may take some time for the process to be completed as the calls are added to the rota
- Using the **Close** button will simply close the Wizard and you will lose any packages you have been creating

## Amending a Package of Care

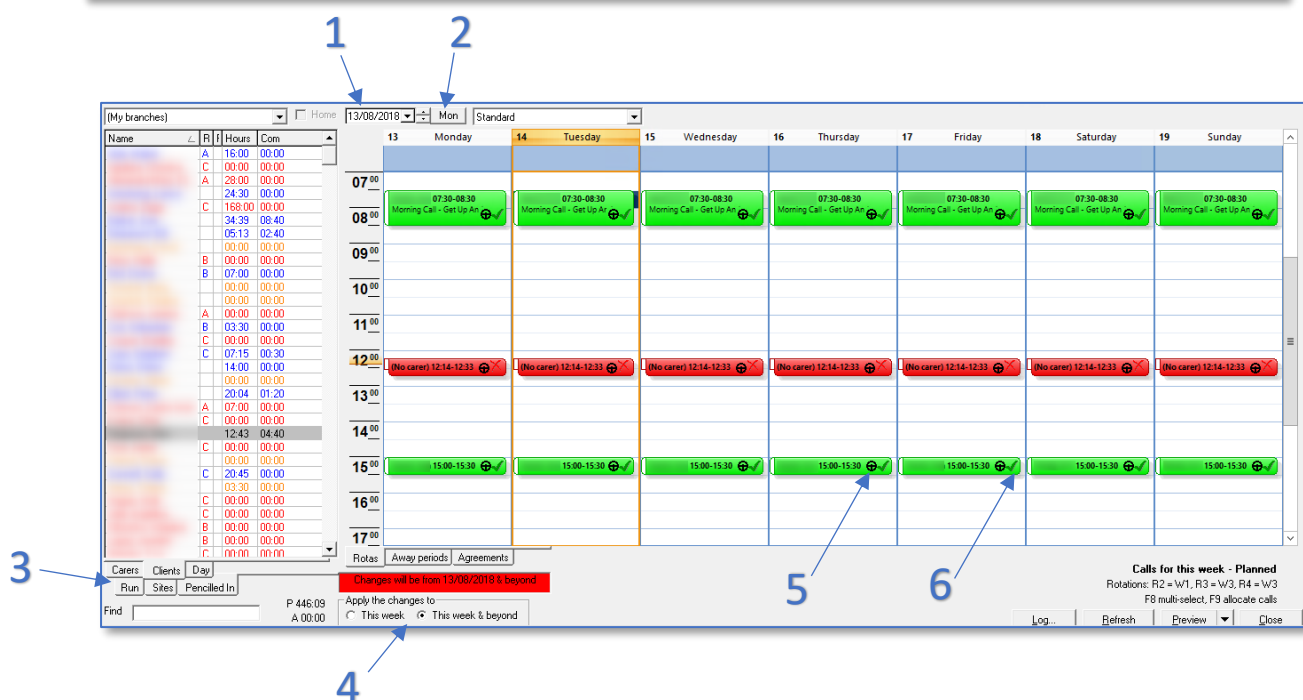
In certain circumstances you may wish to make minor amendments to a package of care and not completely overwrite the whole package. If you are simply adding new calls to the original package then the Wizard can still be used. If you wish to remove calls or times need to be altered a better option may be to make the changes using the rota screen.

# The Rota Screen

## Rota Screen Overview

The Rota screen can be accessed by selecting the rota screen icon on the toolbar. It can also be accessed by clicking the Rotas action button located on either the Client or Carer screen.

Using the Rota action button on either the Client or Carer screen has the added advantage of taking you to the specific rota for the current Client/Carer



1	Go through the weeks using the date controls
2	Return to the current week by clicking <b>Mon</b>
3	Use these tabs to swap between rotas for <b>Carers, Clients, Runs, Sites</b> and <b>Pencilled In</b> calls
4	Take care to check if you are making changes for <b>This week</b> or <b>This week &amp; beyond</b>
5	The steering wheel icon indicates a call where the driver status is set to yes
6	The status icon has been added to show the call status i.e. waiting, completed, missed, NCR etc.

## Managing Calls

### Select the Correct Working Mode

Care must be taken when making changes in the rota screen to ensure that the correct working mode is selected. CareFree allows changes to be made either for just the week you are viewing or for the week you are viewing and all subsequent weeks the week and beyond.

### Working in This Week

You may wish to select the option to work in this week if you wish to make a temporary change to a care package which will affect a call for just the current week. Some organisations prefer to manage their rotas using **This week** if their working patterns change frequently and it is difficult to allocate Carers for long periods of time.

### Working in This Week & Beyond

You may choose to work in **This Week & Beyond** when you know that the changes you make will affect the calls and care package for substantial periods of time. If you change the details of a call or multiple calls whilst working in this mode the changes will affect all calls in subsequent weeks.

Don't be afraid of working in This Week & Beyond. If you make a change which you only meant to apply to the week you were viewing you can simply select the rota for the following week and reset the changes you made

In addition to the control buttons on the main rota screen you have the option to change the working mode when you view the details for an individual call or group of calls. Double-click on a call on the rota and you will see that you can select to make changes for this week and this week & beyond. In addition, you can opt to make changes up until the end of a specific week

## Editing Call Details

### Double-Clicking

You can view and edit the details of any call simply double-clicking on it on the rota screen. This launches the call details box.

The screenshot shows a 'Call details for' dialog box with the following fields and controls:

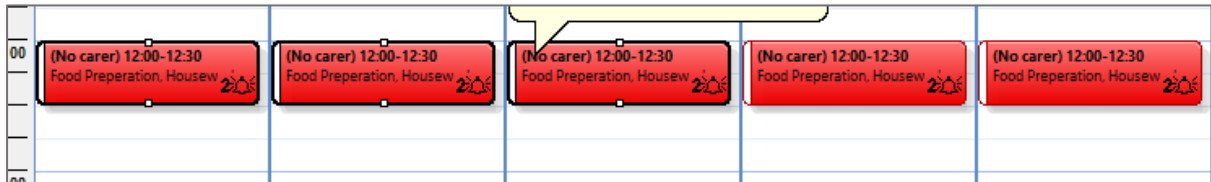
- 1:** Start date (14/08/2018) and End date (14/08/2018) dropdowns.
- 2:** Start time (07:30) and End time (08:30) dropdowns.
- 3:** Type dropdown (Weekly).
- 4:** RoadRunner Notes tab.
- 5:** Carer dropdown.
- 6:** Medication dropdown (None).
- 7:** Medication Time dropdown (None).
- 8:** Run dropdown (None).
- 9:** Contract dropdown (Wakefield CC).
- 10:** Site dropdown (None).
- 11:** Override the default role dropdown (None).
- 12:** 'When changes are made - apply them to' section with radio buttons for 'This week', 'Upto w/e', and 'This week & beyond'.

1	Date and times of calls can be adjusted here. Take care when adjusting start and end dates. These dates must be different for overnight visits or 24/7 live in shifts
2	Additional tabs allow users to amend further details such as needs, alerts for call monitoring and additional expenses or mileage payments/charges
3	The call type can be amended here
4	RoadRunner notes shows a read only copy of any notes made by a Carer when on a visit
5	A Carer can be allocated to the call here
6	Medication instructions \ types can be added here
7	Medication start times can be entered here
8	A call can be placed in a run/round here
9	An alternative contract can be selected here if the Client has multiple contracts
10	A site such as a care home or day centre can be specified here. This is covered in greater detail in the Day 2 CareFree Training Booklet
11	It is possible to override the default pay role for a specific call here. This feed into the rules governing Carers pay
12	Select the appropriate working mode here

## Selecting and Amending Multiple Calls

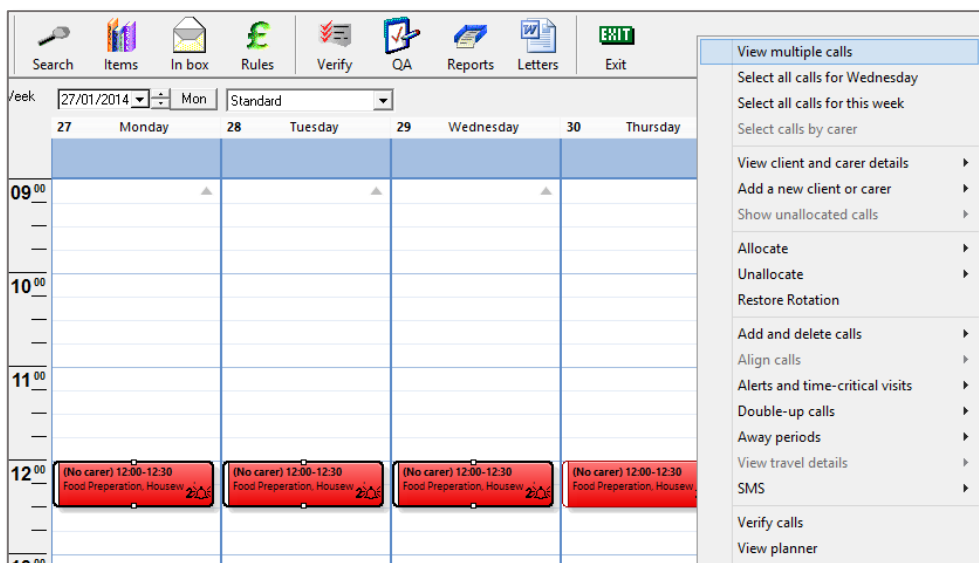
1. Press and hold down the **CTRL** key
2. Click once on each of the calls you wish to view and change collectively

The black outline will show on all of the selected calls as shown below:



In order to make changes once the calls have been selected in this way:

1. Right-click anywhere on the screen
2. Select **View Multiple Calls**





## Right-Click Options

Right-clicking in CareFree will often provide users with a wide range of available actions. The right-click menu in the rota screen gives access to many useful options and controls.

Options to help select or view calls on the rota

- View multiple calls
- Select all calls for Thursday
- Select all calls for this week
- Select calls by carer

Options for allocating and unallocating calls

- View client and carer details >
- Show unallocated calls >
- Allocate >
- Unallocate >
- Restore Rotation

Options for adding and deleting calls and away periods

- Add and delete calls >
- Align calls >
- Alerts and time-critical visits >
- Double-up calls >
- Away periods >
- View travel details >
- SMS and email >

Access to other parts of CareFree linked to the rota

- Verify calls
- View planner
- View package
- Print rota

Display the rota in shorter or longer intervals

- View intervals >

Choose to display additional details on the rota

- Show using Planned times
- Show using Actual times
- Show call times
- Show inactive people
- Show package
- Show preferred times
- Show call trace

## Dragging and Dropping

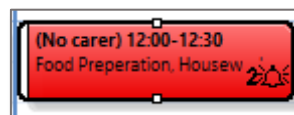
It is possible to move calls on the rota and change call duration without opening the call details box.

To move a call:

1. Click and hold the mouse button down to drag it to the desired time
2. Release the mouse button to drop the call in its new position

To alter a call's duration:

1. Click once on the call to select it (the black outline denotes a call is selected)
2. Click, hold and drag the white box located at either end of the call to extend or decrease the calls length



Click the **Refresh** button after making changes as this will update the changes in full for you.

Planned in future  
Rotations: R2 = W2, R3 = W1, R4 = W2  
F8 multi-select, F9 allocate calls

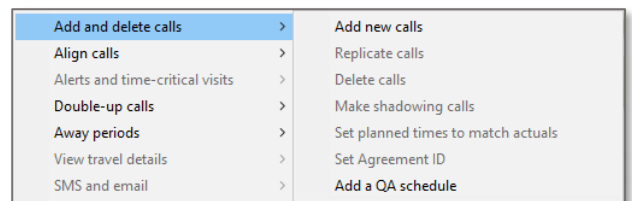
Log... Refresh Preview Close

## Adding & Deleting Calls

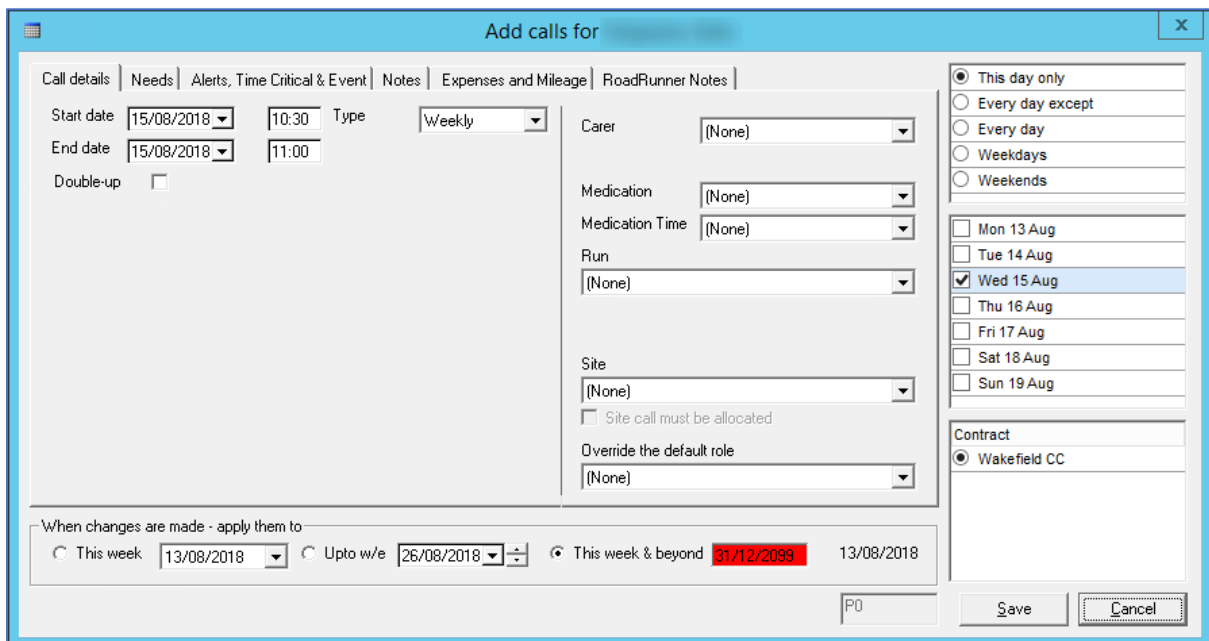
Individual calls can be added to or deleted from the rota very quickly without the need to use the Package Wizard. Please note that any calls added in the rota screen will not be catalogued in the package notes of the Client record and as such it is a good idea to make sure there is a contact log recording the request for these amendments to be made.

### Adding a Call

1. Select the rota for the Client who requires calls adding
2. Hover your mouse over the rota and right-click to reveal list of options
3. Select **Add and Delete Calls** from list of options
4. Select **Add New Calls** option



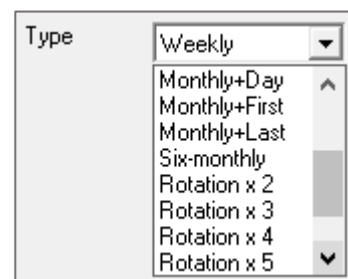
The **Add Calls** box will appear:



## Additional Call Types

When adding calls to a Client or Carer rota a number of flexible new options are available to users. A new call type called monthly can be specified with three options:

- **Monthly + Day**
  - Allows users to create a call which recurs on the same day of each month which is specified by including a date in the monthly day box
- **Monthly + First**
  - Allows users to create calls which recur on the first Monday, Tuesday, Wednesday etc of each month
- **Monthly + Last**
  - Allows users to create calls which recur on the last Monday, Tuesday, Wednesday etc of each month



Care should be taken to complete all of the required elements of the call namely:

- Make sure you tick the **Double Up** box if required
- Dates and times for call
- Specify **Needs**
- Set **Alerts** or make the call **Time Critical**
- Decide if the call needs to be added for this week only or every week going forwards
- Add the call to a run if required
- Allocate a Carer if you know who will be responsible for delivering the care
- Click on **Save** to complete

## Deleting Calls

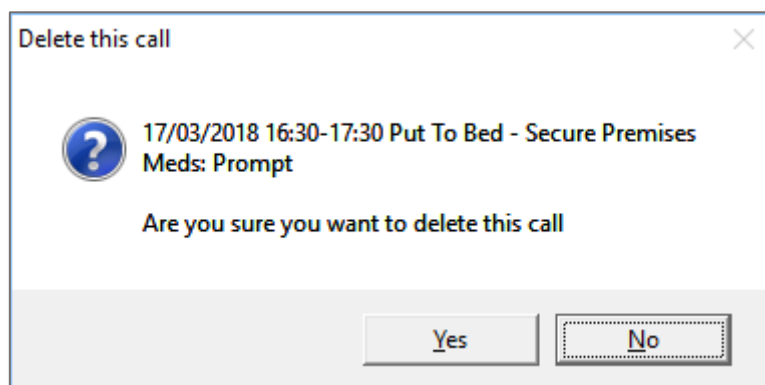
A similar process can be followed in order to delete a call from the rota:

1. Select the rota for the Client who requires calls deleting
2. Click once on the call you wish to delete to select it
3. Hover your mouse over the rota and right-click to reveal list of options
4. Select **Add and Delete Calls** from list of options
5. Select **Delete Calls**

### OR

1. Select the rota for the Client who requires calls deleting
2. Click once on the call you wish to delete to select it
3. Press the **Delete** key on the keyboard

You will be asked to confirm your request to delete the call from the rota:

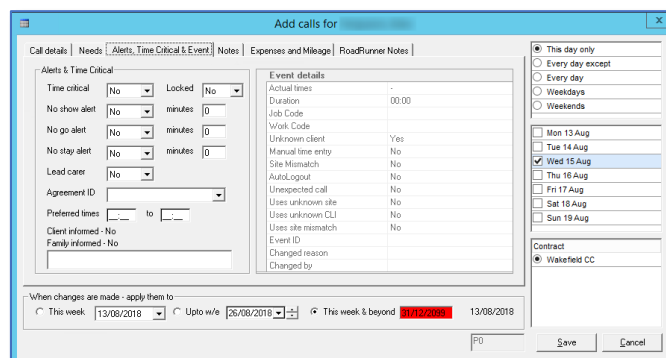


Delete option will not be displayed in list of options unless a call/calls are highlighted by first clicking on them

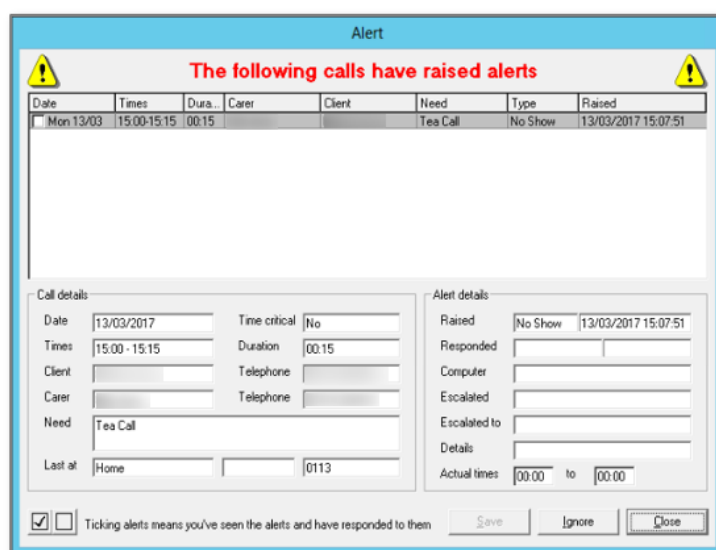
## Setting Call Alerts

To set alerts on a call:

- Double-click a call
- Go to **Alerts, Time Critical & Event**
- **Time Critical** will lock the call on the rota. The call details on RoadRunner and the On-Call app will show that the call is time critical
- **Locked** will lock the call on the rota. This is used in the verify screen and when invoices and wages are finalised
- **No show alert** will notify the CareFree user when a Carer has not logged into a call
- **No go alert** will notify the CareFree user when a Carer has not logged out of a call
- **No stay alert** will notify the CareFree user when a Carer has not stayed the entire length of the call



Below is an example of an alert that has appeared in CareFree. The alert pops up for all users who are configured to receive alerts.



## Allocating Calls

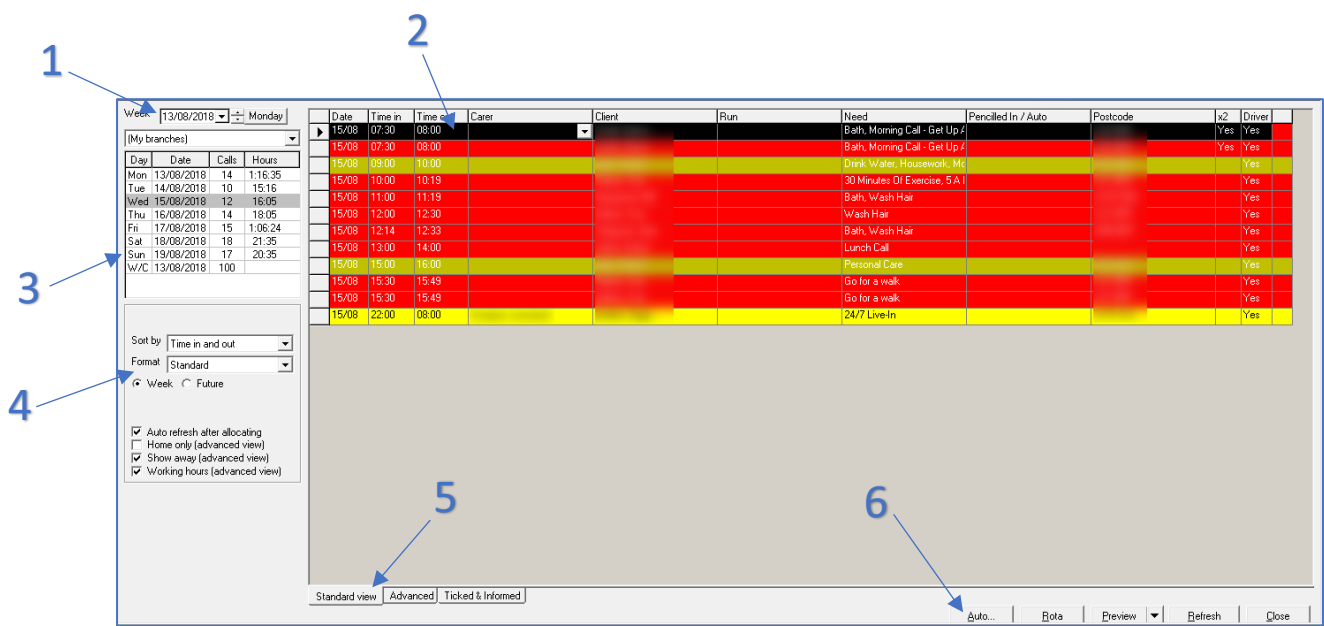
### Viewing Unallocated Calls

An unallocated call is a call that has not yet been matched with a Carer or one that has been previously matched, but due to sickness/holiday etc, the selected Carer will no longer be able to cover the call.

Unallocated calls can either be viewed on the rotas or by opening the unallocated call screen. This is opened by double-clicking on the word unallocated in the status bar at the bottom of the screen. For a more specific view of today's unallocated then click on the number in the status bar representing the number of unallocated calls for today.

If a double up call is required for a Client and only one Carer has been allocated then the remaining call will show as unallocated.

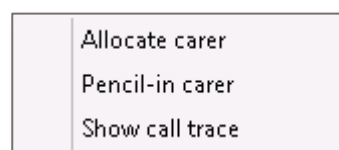
**When viewing unallocated calls note that calls will appear in red except time critical calls, which appear in a mustard colour, where the Carer is away these calls will appear in yellow, and the specific call that is highlighted, which appears black**



1	Select the week that you wish to view
2	Currently selected calls show in black
3	Specific days can be selected here
4	Calls can be sorted by time or town here
5	These tabs switch between available views
6	It is possible to auto allocate calls by clicking the <b>Auto</b> button

### To Access the Trace for a Specific Call

1. Select the call in the standard view tab of the unallocated calls screen
2. Right-click
3. Select **Show Call Trace**

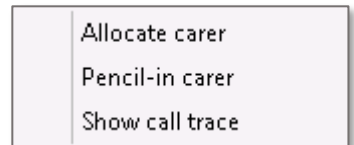




## Allocating calls from the Unallocated Screen

### Allocating a Carer to an Individual Call

1. Click in the Carer field in the selected call you wish to allocate
2. Click on the drop-down arrow
3. Use the pop-up window to select a Carer from list then confirm your selection by clicking **Allocate Carer**
4. Warnings on the right-hand side of the pop-up box indicate possible call overlaps, working time restrictions and any relevant exclusions



Allocate calls for : Wed 15/08/2018 07:30-08:00

Carer	Phone No	Away	DBS	Transport	Called?
(None)					<input type="checkbox"/>
			Yes	Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
			Yes	Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
			Yes	Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
			Yes	Own car	<input type="checkbox"/>
				Own car	<input type="checkbox"/>
				Car Share	<input type="checkbox"/>
				Car Share	<input type="checkbox"/>
				Own car	<input type="checkbox"/>

Calls 2 hours either side (red means overlap with this call)

Times	Client	Need	TC
14/08 19:00-20:00		Personal Care	
15/08 06:00-06:45		Morning Call - Get...	
15/08 07:00-08:00		Morning Call - Get...	
15/08 08:30-09:30		Morning Call - Get...	
15/08 10:00-11:15		Morning Call - Get...	
15/08 11:30-12:30		Lunch Call	
15/08 12:00-13:00		Lunch Call	

Working Hours

- Mon 06:00-19:00
- Tue 06:00-19:00
- Wed 06:00-19:00
- Thu 06:00-19:00
- Fri 06:00-19:00

Carer excluded by client

Warning! This carer has been excluded by the client. The reason given is 'Personality clash'

Client excluded by carer

Warning! This client has been excluded by the carer. The reason given is 'Personality clash'

Allocate Cancel

## Allocating a Call from the Rota

Calls can also be allocated directly through the rota screen. Remember that selecting this week & beyond allows you to apply any changes to the rotas for the future also.

1. On the rota screen select the call/calls that you wish to allocate
2. Right-click
3. Select **Allocate**
4. Select **Allocate Call**

The allocation screen helps you to select the most appropriate Carer for the call.

Select more than one call and allocate them all at once by holding down the Ctrl key while clicking the calls you want

Name	Phone no	1	2	3	4	5	6	7	8	9	Miles	Time	Hours	Transport
		✓	✓	✗	✓	✓	✓	✓	✓	✓	13.4m	Home	0-48-0	Car Share
		✓	✓	✓	✓	✓	✓	✓	✓	✓	15.0m	Home	0-48-0	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	12.3m	Home	20-48-0	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	16.1m	Home	0-16-0	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	22.5m	Home	0-48-3.5	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	30.0m	Home	0-48-0	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	30.0m	Home	0-48-0	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	10.3m	Home	0-48-4	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	30.0m	Home	20-48-12.5	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	21.3m	Home	20-48-33.25	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	13.4m	Home	0-48-1	Car Share
		✓	✓	✓	✓	✓	✓	✓	✓	✓	17.2m	Home	0-48-68.82	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	17.2m	Home	0-16-9	Own car
		✓	✓	✓	✓	✓	✓	✓	✓	✓	17.8m	Home	0-48-1	Own car

Key


1. Available	4. Previous visits	7. Cultural matching
2. Near by	5. Short on hours	8. Not excluded by Client
3. Skill set	6. Preferred carer	9. Not excluded by Carer

Working Hours

Mon 10:00-22:00
Tue 10:00-22:00
Wed 10:00-22:00
Thu 10:00-22:00
Fri 10:00-22:00
Sun 10:00-22:00

1	Carers are listed here and ordered according to the number of matching criteria they have against the Client/call
2	Each green tick or red cross represents a match or mismatch against the matching criteria in this key
3	Any clashes with existing calls show in red in this section. White calls are those within 2 hours of the call you are allocating
4	This area shows the working/non-working hours for the selected Carer
5	Use the action buttons here to select and allocate a Carer

## **Matching Criteria**

The allocation screen prioritises your Carers for the call you are allocating using a series of matching criteria which are indicated on the screen by a series of green  icons. The key at the bottom left of the allocation screen indicates which of the fields refer to which criterion.

### **Available**

A tick appears in this field only when the Carer is not allocated to a different call at that exact time. Any overlaps or near overlaps are also indicated to the right of the allocation screen.

### **Near By**

Using either Google Maps or Microsoft MapPoint, this field identifies the nearest Carer to the location of the call based on where they are currently rostered to be.

### **Skill Set**

If a qualification has been registered as a requirement for Carers on the Clients special needs tab a tick will only appear alongside those Carers who have the matching qualification on their record.

### **Previous Visits**

If the Carer has previously visited the Client then this field will contain a tick.

### **Short on Hours**

On the Carers other details tab the minimum and maximum hours feed through. Alongside the number of hours already allocated to the Carers for that week. Those below their target hours will have a tick here.

### **Preferred Carer**

The Client preferences screen allows a preferred Carer to be specified. This selection would result in a tick for the Carer here.

### **Excluded by Carer/Client**

Any exclusions (in Client & Carer preferences) will also be used to match on the allocation screen. Ticks here represent not being excluded.

### **Cultural Matching**



Any cultural information used on the Client/Carer preferences screen will enable a match on these grounds.

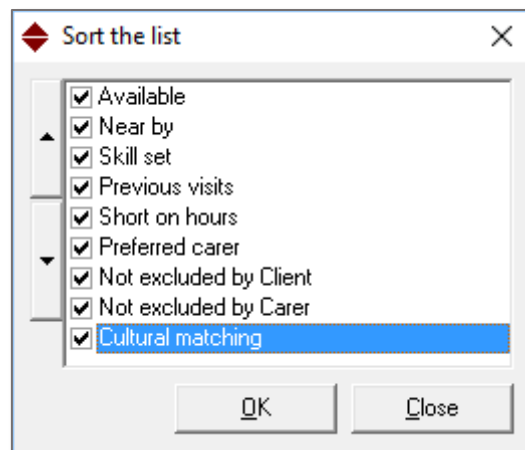
## Changing the Priority Order

The order used to prioritise these matches can be set within the Tools Menu.

1. Open the **Tools** menu
2. Select **Options & Settings** and then **Shared Options**
3. Select **Rostering** in the list on the left-hand side



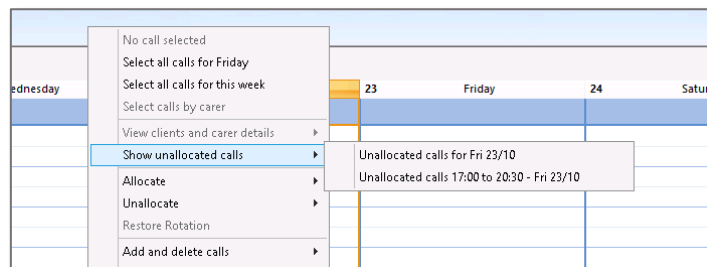
4. Go to the area named **Matching Criteria** and click on **Change Priorities** (once clicked an  icon will appear)
5. Click the  icon to sort the list order using the arrows on the left of the box



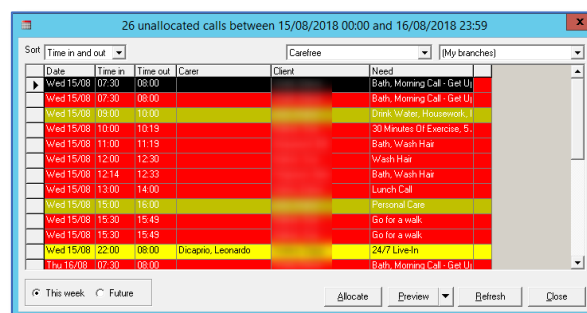
## Show Unallocated Calls – Branch Filter

Within the show unallocated calls window there is a filter which helps users identify visits a Carer could complete during a specific time range when they have a gap in their rota. To use this feature:

1. Select a Carers rota
2. Click and drag an area on the rota to select it (it will appear shaded blue)
3. Right-click on the rota
4. Select **Show Unallocated Calls**
5. Choose to display unallocated calls for the whole day or for the time period you highlighted on the rota



6. Unallocated calls for the time range selected will be displayed
7. Use the drop-down boxes to filter the list by company or branch

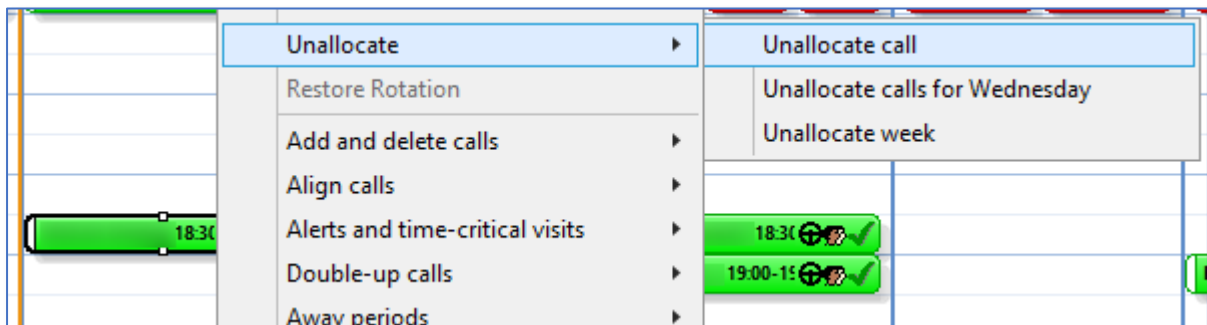


8. To allocate one of the calls to the Carer you originally chose, select it in the list and click **Allocate**

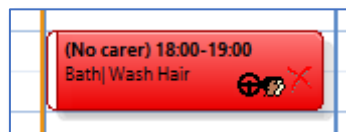
## Unallocating Calls

You can unallocate calls from the Clients rota screen.

1. Select the call
2. Right-click and select **Unallocate**
3. Select **Unallocate Call**



4. You will know that a call has been unallocated as it will show red on the rota when you have completed the process



If you are unallocating a call because you want to change the Carer, save time by simply following the allocate process and the name will be changed. It is not necessary to unallocate prior to allocating a new Carer

## Runs

CareFree provides the option to construct and view rotas in Runs.

Within the rota screen click on the **Run** tab.



This screen view of the rota displays any Runs which have been created and lists which Carers are responsible for it.

A screenshot of the CareFree rota screen. The interface shows a weekly grid from Monday (13/08/2018) to Sunday. The grid is organized by time slots on the left (11:00, 12:00, 13:00, 14:00, 15:00, 16:00, 17:00, 18:00, 19:00, 20:00). Each cell in the grid contains a call type and time range, such as 'Lunch Call 11:30-12:30' or 'Bath, Wash Hair 13:30-14:30'. Some cells are marked as 'Unallocated' in red. The bottom of the screen features a navigation bar with tabs for 'Run', 'Sites', 'Pencilled In', 'Carers', 'Clients', and 'Day'. There are also buttons for 'Refresh', 'Preview', and 'Close', and a status bar at the bottom right indicating 'Calls for this week - Planned'.

## Setting up Runs

You need to decide on how you will group the calls together into runs and choose a suitable name for each run. Useful run names are based on the time the run is completed e.g. Run 1 AM, Run 2 AM, Run 1 PM etc. Or on geographical location.

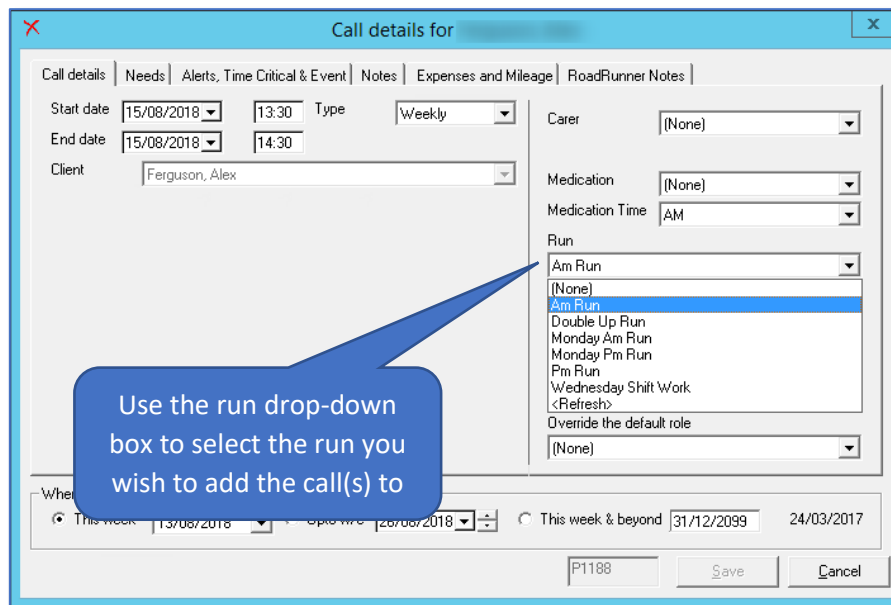
Run names need to be created using the items screen:

1. Open the **Items** screen
2. Select **Runs** in the list at the top left of the screen
3. Click **New** to add a new run name to the list

## Add Calls to Runs

Adding calls to runs is quick and easy to do:

1. Double-click on a call to view the call details (or multi-select a group of calls, right-click and select **View Multiple Calls**)
2. A pop-up box showing you all the call details will be displayed



3. Click this drop-down and you will see all the runs you created in the items screen
4. Select the relevant run and click **Save**
5. You can check that the call has been saved in the correct run by viewing the rota in the Run view

## Mark Runs as Inactive

To reduce clutter which can develop on the run rota screen an option has been added to mark old runs as inactive and hide them from view. To mark a run inactive:

1. Open the **Items** screen
2. Select **Runs** in the list at the top left of the screen
3. Click **Edit** and untick the active box



# Using CareFree to Communicate




## Sending a Message

Messages can be sent to more than one person at any one time, just tick the relevant people whom you wish to send the message to

It is possible to send messages to Clients or Carers if their email addresses have been stored in the database and your email server details have been specified within CareFree. It is also possible to send messages to other users of CareFree.

1. Click on the **Inbox** icon at the top of the screen
2. Click on **New** to create a new message



1	Use the <b>Subject</b> and <b>Message</b> fields to input your message detail – the subject field is optional
2	To send the message to a CareFree user use the  icon next to this box
3	To send the message to via SMS use the  icon next to this box
4	To send the message to via RoadRunner/Portals use the  icon next to this box
5	To send the message via an email to a Client or Carer use these drop-down boxes. You must have their email address stored in their records
6	Use the <b>Spell</b> button to spell check the message
7	Click <b>Send</b> to send the message

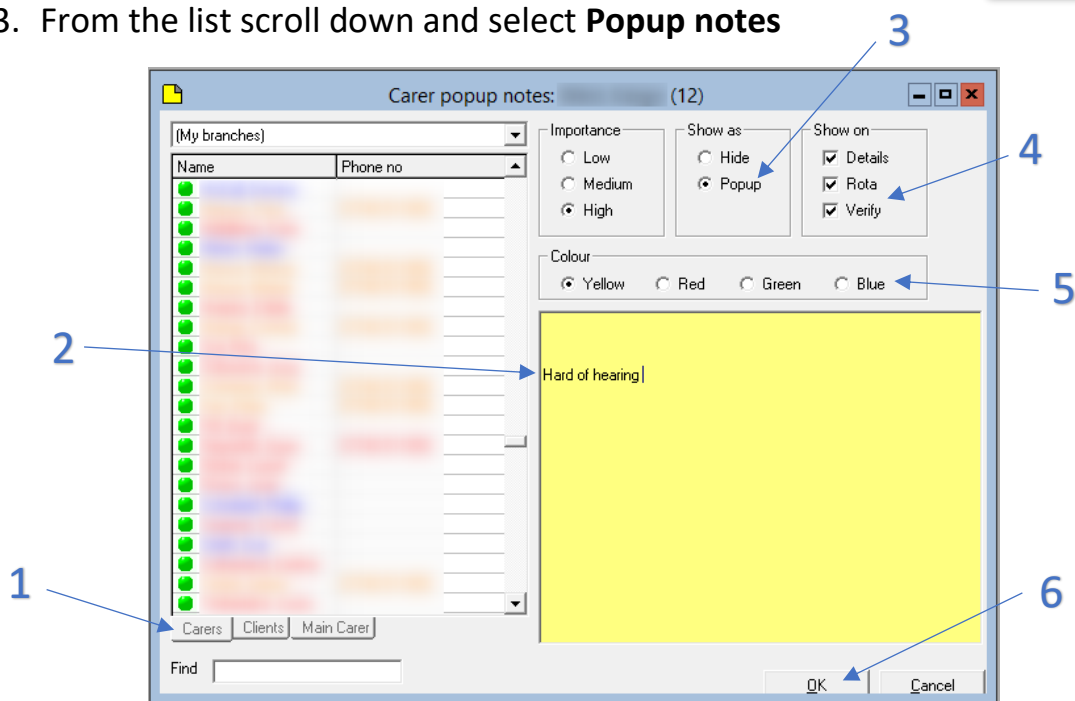
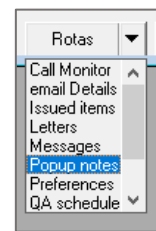
# Pop-Up Notes

## Adding a Pop-Up Note

Always ensure that you select pop-up (as opposed to 'hide') when adding a note otherwise the details will not be displayed when the Client/Carer is viewed

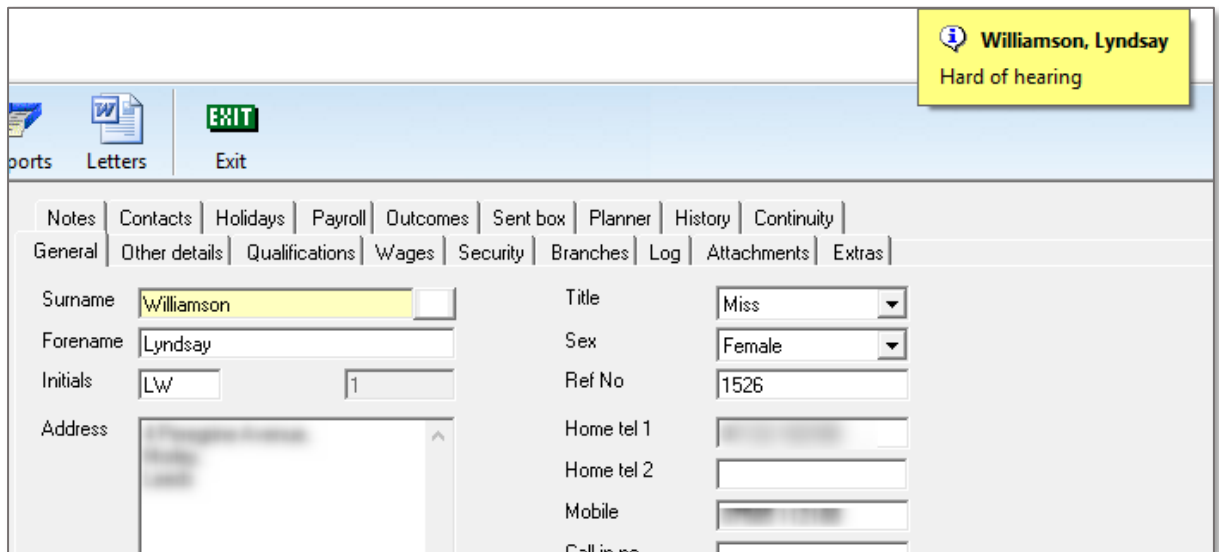
A Pop-Up note can be used in a similar way to a warning as it will provide a visible on screen note whenever specific Client or Carer screens are selected. A Pop-Up note is created as follows:

1. Go to either the Client or Carer record which you want to apply the Pop-Up note to
2. Click on the downward arrow next to the rotas action button
3. From the list scroll down and select **Popup notes**

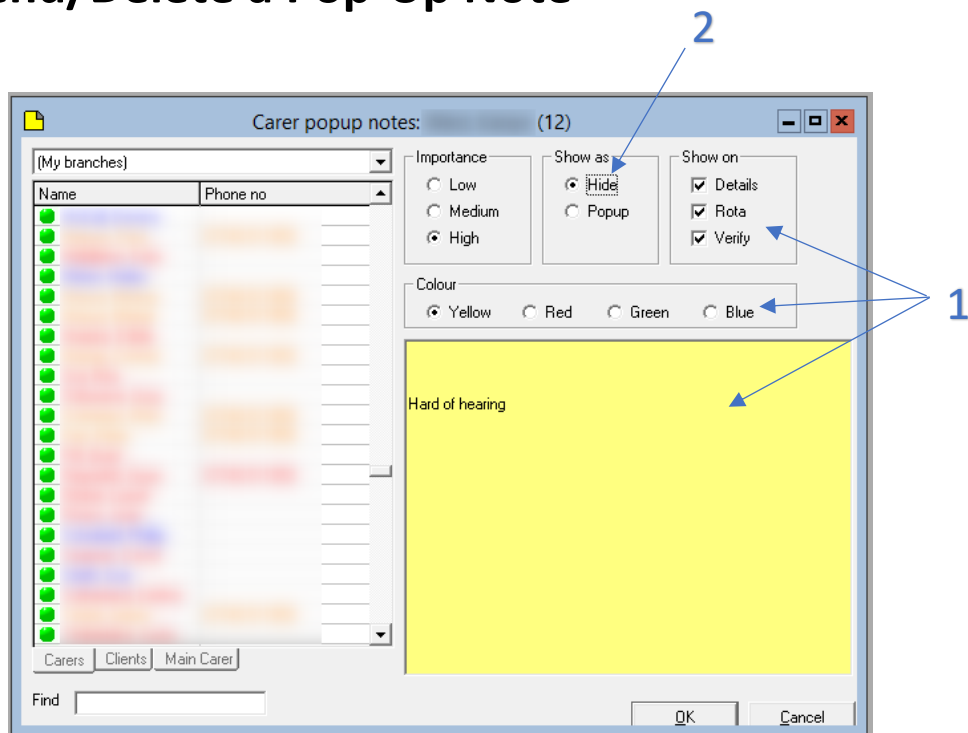


1	View either a Client or Carer list by selecting the appropriate tab
2	Type the text you would like to display on the note here. By entering back spaces before this makes the pop-up note much more noticeable
3	Ensure you have select <b>Popup</b> to activate the note
4	Choose which screens you would like the note to display on
5	Choose background colour for the note
6	Click <b>OK</b> to save details and activate the pop-up note

Once the pop-up note has been created a note will appear in the right-hand side of the screen for the specific Client/Carer.



## To Amend/Delete a Pop-Up Note



- |   |   |
|---|---|
| 1 | To amend a pop-up note, follow the above steps, change the pop-up note appropriately then click <b>OK</b> once finished |
| 2 | To delete a pop-up note, follow the above steps and change the <b>Show as</b> setting to <b>Hide</b>                    |

# CareFree Security

## CareFree User Security

You can add as many individual users into CareFree as you require. The number of users able to login to the system concurrently will depend on the licence agreement you have with the CareFree group.

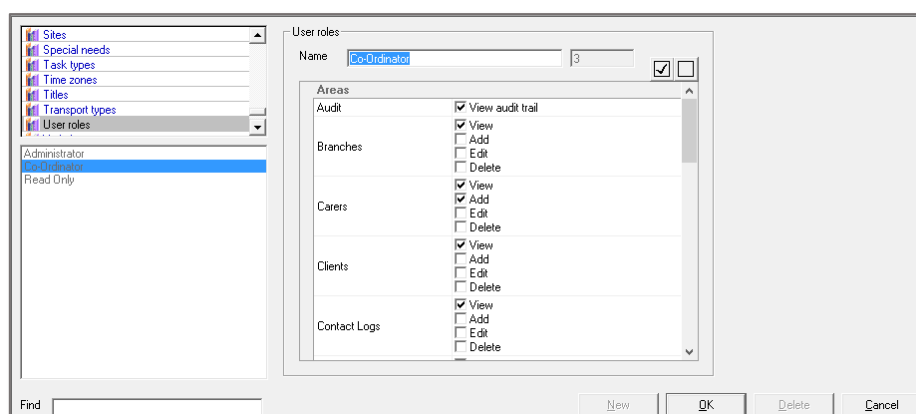
## User Roles

Each user will have a designated **User Role**. This will determine which functionality and information within CareFree they can access. You can create/amend user roles via the **Items** screen choosing the functionality each user role has access to.

It is best practice to create/amend user roles before adding users to the system.



1. Go to the **Items** screen
2. Go to **User Roles**
3. Click **New** if you wish to create a new user role or if you wish to amend an existing user role, select the user role and click **Edit**



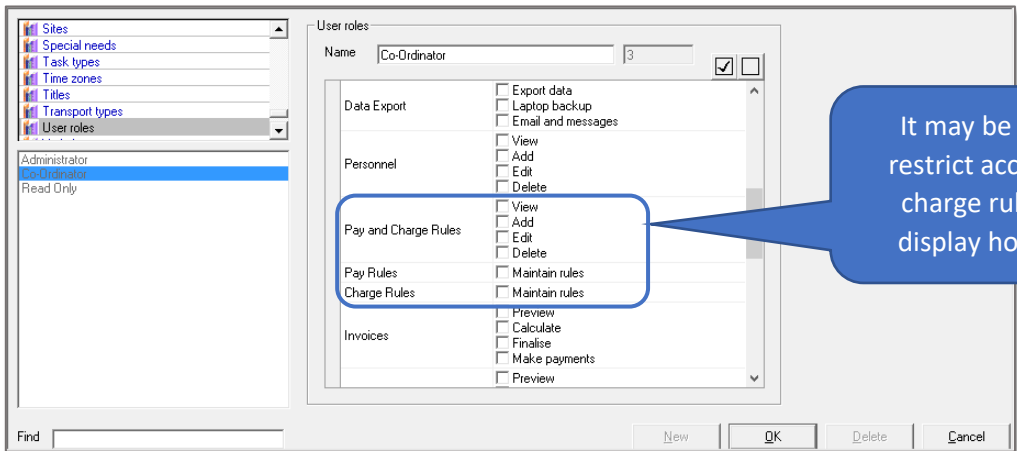
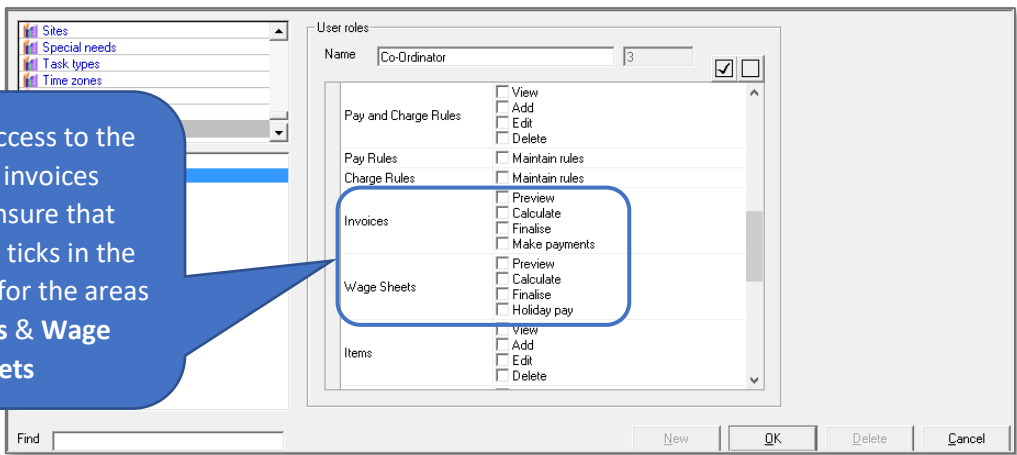
4. A list of system areas will be displayed. The tick boxes within these areas will allow permission where ticked and deny when unticked e.g. under the Carers area if the **Add** tick box is ticked the user will be able to add new Carers to CareFree. If the **Delete** tick box is unticked the delete button will be greyed out

Once the roles and role restrictions/access criteria have been set users can be created and assign to the appropriate user role.

### **Financial Information User Access**

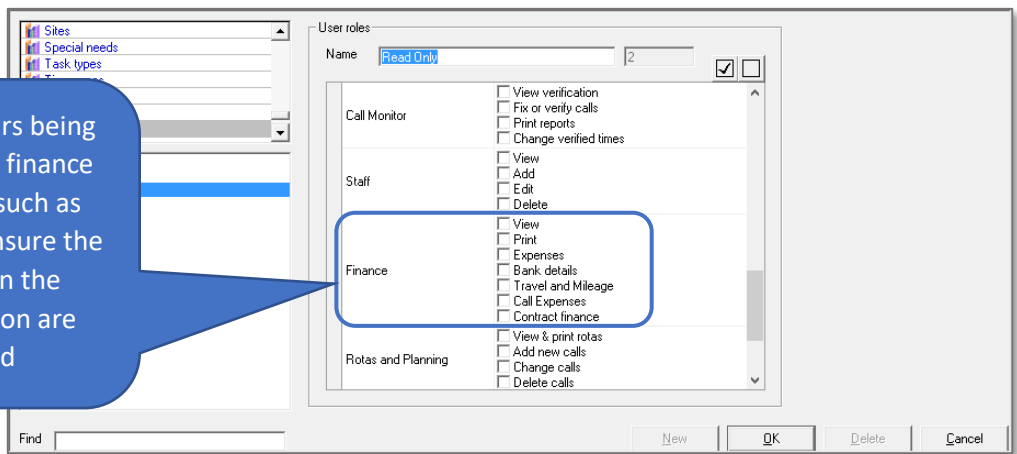
It is common for system administrators and managers to want to restrict access to financially sensitive information. This is easily achieved by denying access to certain functional areas for specific user roles.

To restrict access to the wages or invoices sections ensure that there are no ticks in the access rights for the areas of **Invoices & Wage Sheets**



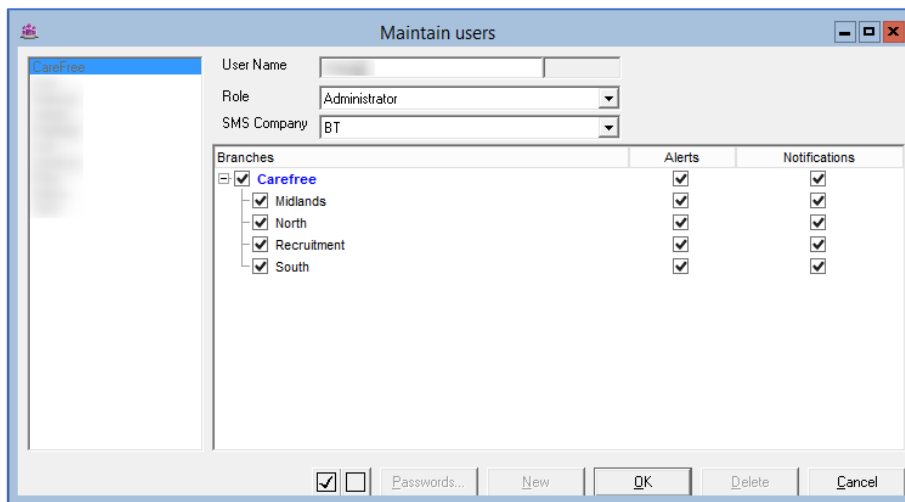
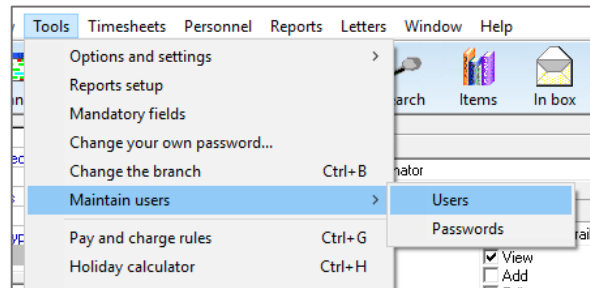
It may be handy to also restrict access to pay and charge rules as this will display hourly pay rates

To restrict users being able to access finance information such as bank details ensure the tick boxes in the finance section are unticked



## Adding Users

1. Go to the **Tools** menu at the top of the screen
2. Go to **Maintain Users**
3. Click **Users**
4. When the user screen appears, click **New** to create a new user

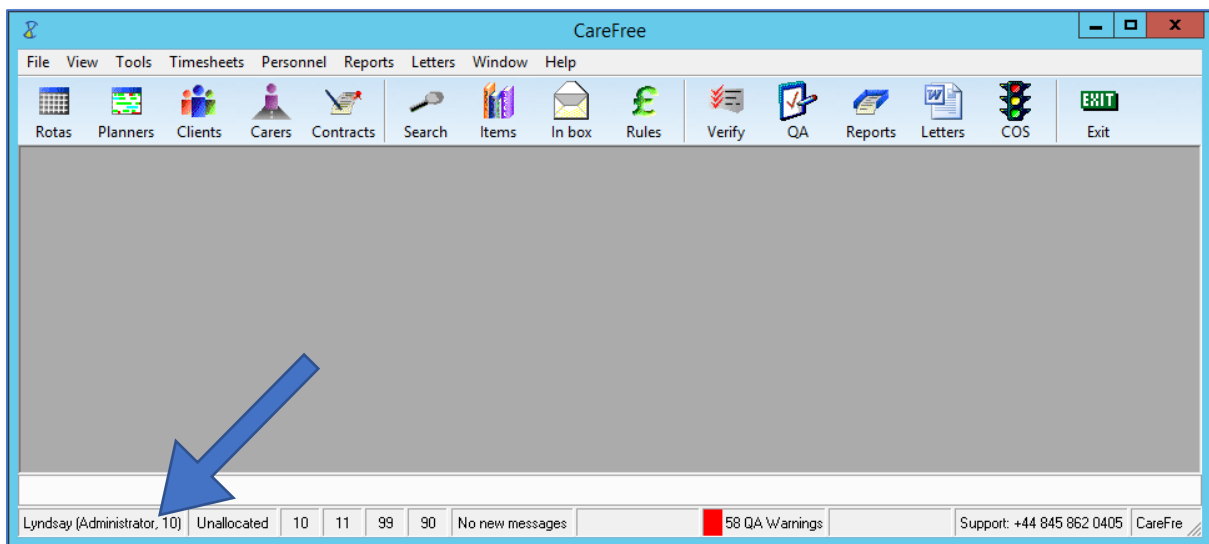


5. Type in the name of the required new user in the **User Name** field
6. Select an appropriate role for the new user
7. Select the companies and branches this new user will have access to
8. Select whether the new user will need to receive alerts and/or notifications for certain companies and branches
9. Click **OK** and to save the new user

## Logging in as a Different User

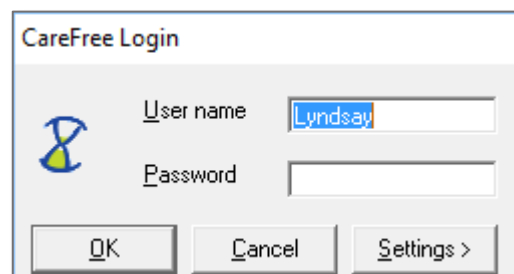
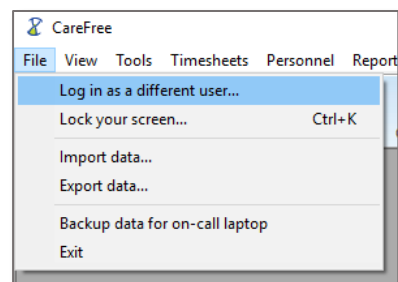
It is essential that you are always logged into CareFree with your own user account.

A quick way to see who is logged into CareFree is by looking to the bottom left part of the screen which will show the name of the user who is logged in and what their user role is.



If the user who is logged in is not your user account you must switch users.

1. Go to the **File** menu at the top of the screen
2. Click **Log in as a different user...**
3. Enter in your own **User name** along with your **Password**
4. Click **OK**



## CareFree Password Security

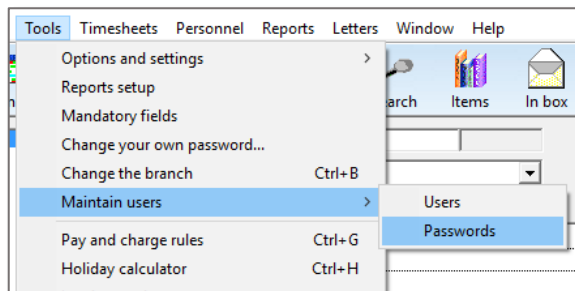
This part of the guide will explain how to change and reset passwords for CareFree users. There is also a section on how setting password security for all CareFree users.

### Resetting and Changing Passwords

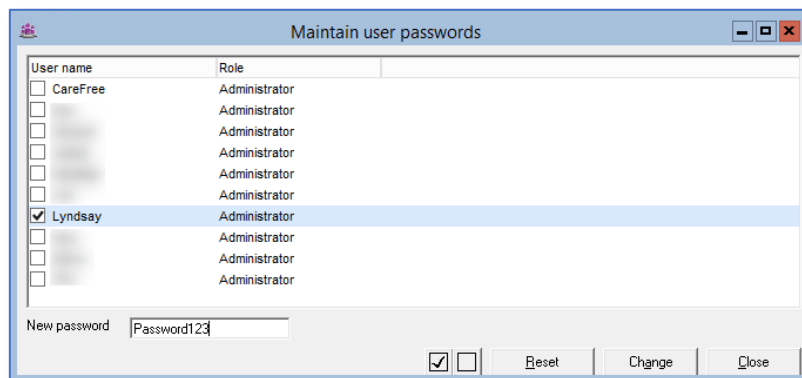
By default, the password for a new user is set up as being the same as their user name.

This can be altered using the passwords screen. To access this screen:

1. Go to the **Tools** menu at the top of the screen
2. Go to **Maintain Users**
3. Click **Passwords**



4. The passwords screen will then appear



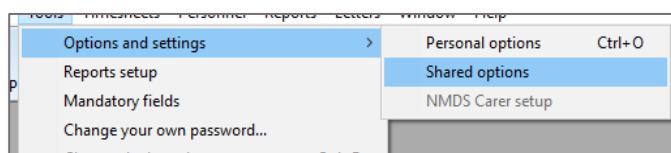
5. Select the user whose password you wish to change
6. Type new password in the **New Password** field
7. Click **Change** to change the user's password
8. By clicking **Reset** this will change the user's password to the default setting (their username)



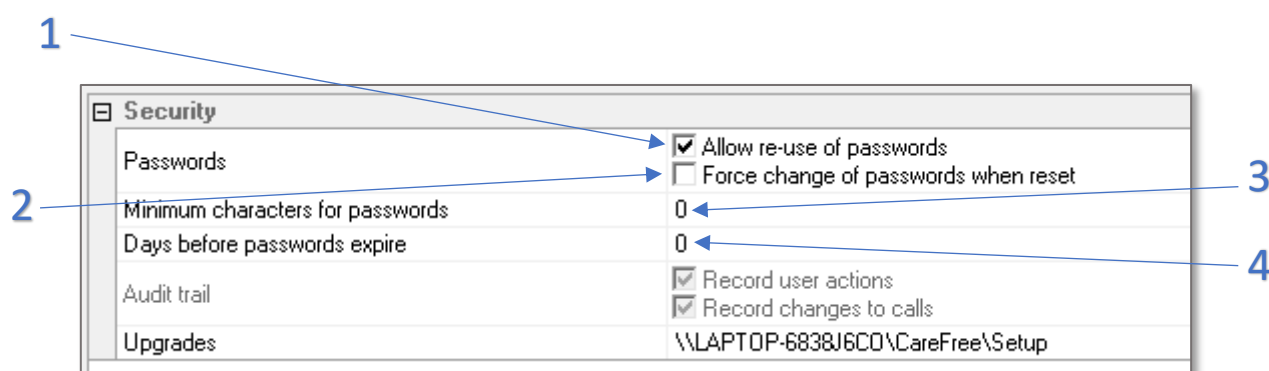
## Password Security – Shared Options

A setting for all users can be set within the shared options of CareFree to ensure passwords are reset after a certain amount of days and a minimum amount of characters are used on every password.

1. Go to the **Tools** menu at the top of the screen
2. Go to **Options and Settings**



3. Click **Shared Options**
4. When the shared options screen appears, click **Security** listed down the list of the screen



1	<b>'Allow re-use of password'</b> will determine whether users can use a previously used password to access CareFree
2	<b>'Force change of passwords when reset'</b> will force the user to change their password when it has been reset. See <a href="#">page 88</a> of this guide for more information on resetting passwords
3	<b>'Minimum character for passwords'</b> will determine the number of characters that must be used for a password
4	<b>'Days before passwords expire'</b> will determine the number of days before a password will need to be changed