CareFree Day 2 Training Guide

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Creation Date	Author	Version
12/07/2018	Lyndsay Williamson	V1

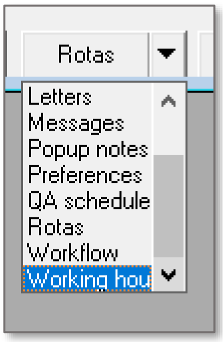
Adding Working Hours

In order for CareFree to provide more accurate insights into capacity planning and allocate Carers more effectively it is helpful to add your Carers working hours to the database.

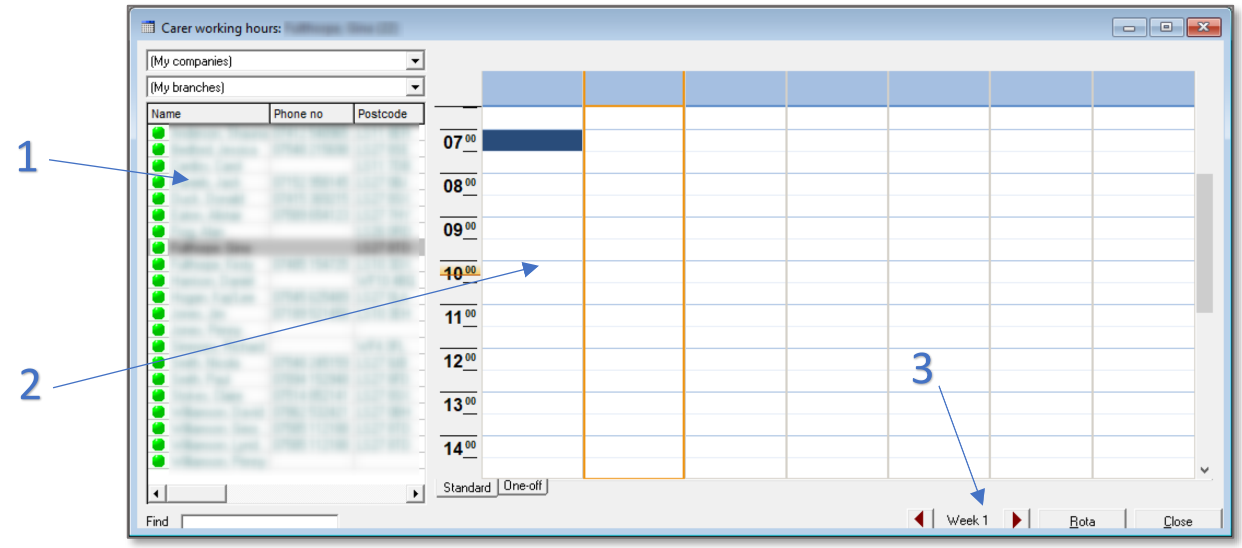
Entering Carers working hours into CareFree will not prevent you from allocating calls outside of this time period. You will simply be warned that the call falls outside of the Carers working pattern.

Completing this task will affect how accurate the recommendations are that are returned when filling unallocated calls.

Specify a Working Pattern

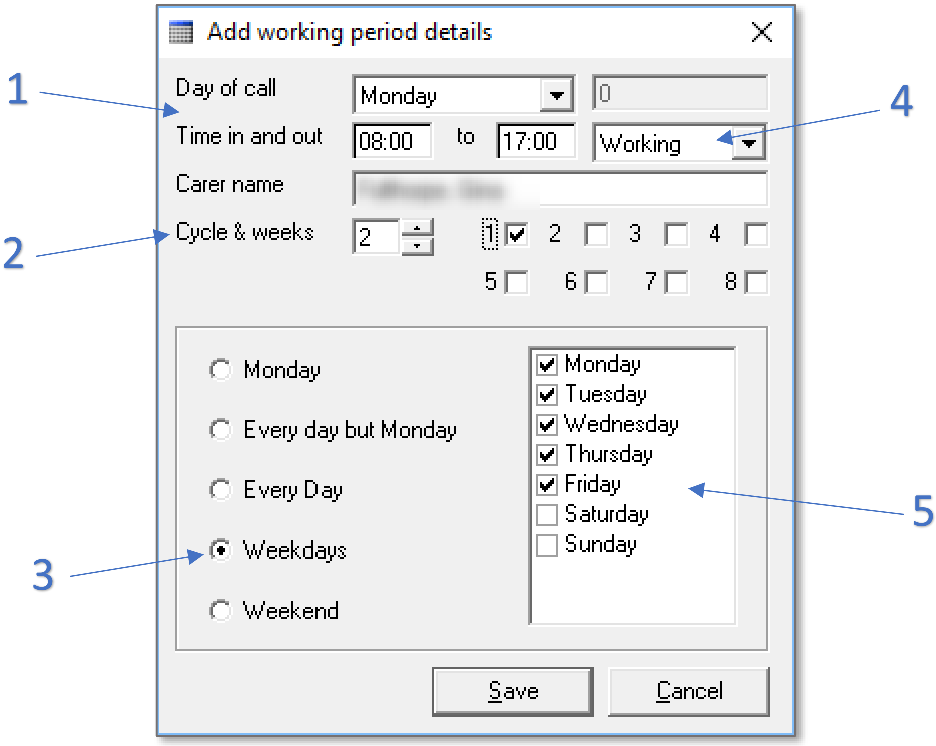


1. Open the **Carers** screen
2. Select the Carer whose working hours you wish to add in the list on the left of the screen
3. Click on the drop-down arrow next to the **Rotas button**
4. Select **Working Hours**



1	Select the Carer here
2	Working hours are added here
3	Use the arrows to skip through weeks

5. **Right-click** on the blank area where working hours are added (point 2 on the previous screenshot)
6. Click **Add New Time Period**

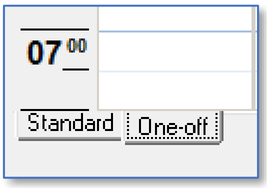


1	Enter start and end times for working periods here
2	For Carers who work alternating shift patterns, specify how many weeks the cycle runs over  and then say which week(s) you are specifying for the working pattern for 
3	Choose a pre-set pattern for the days the Carer works here
4	Either working, non-working, cover or office hours can be specified here
5	Select the days to create your own pattern here

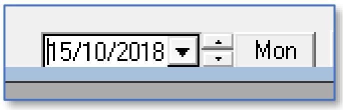
Specify a One-Off Working Week

A one-off working week may need to be entered when the Carers working pattern changes for a week or for a certain period of time.

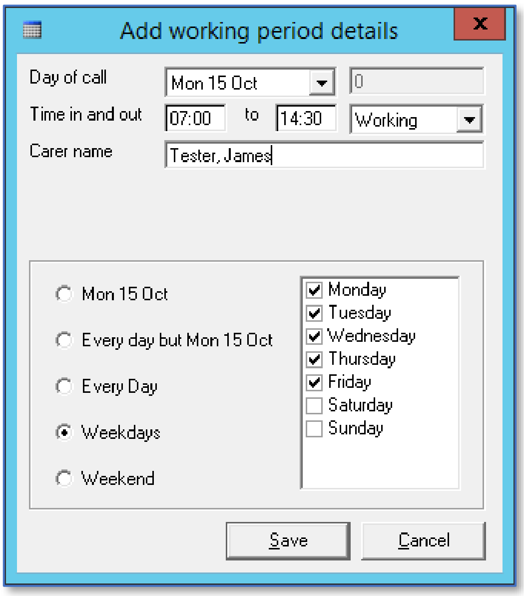
1. In the **Working hours** screen, click the **One-off** tab at the bottom of the screen



2. Instead of seeing week 1, 2, 3 etc, at the bottom of the screen. Instead there is the option to select a specific week. Go to the week where the one-off working time period needs to be entered



3. **Right-click** on the blank area where working hours are added
4. Click **Add New Time Period**
5. The screen that appears is the same screen as described on page 6 except there is no option to specify a week cycle as this is a one-off time period. It is important to note that you will need to plan the whole week of working hours if this option is used.



6. Click **Save** and repeat on additional weeks if necessary

Advanced Rotas and Rostering

In the first day of training we covered the basics in terms of building packages of care and adding calls to the Rota. We will now look at the more advanced features and functions in relation to Rotas and rostering.

Adding and Deleting Away Periods

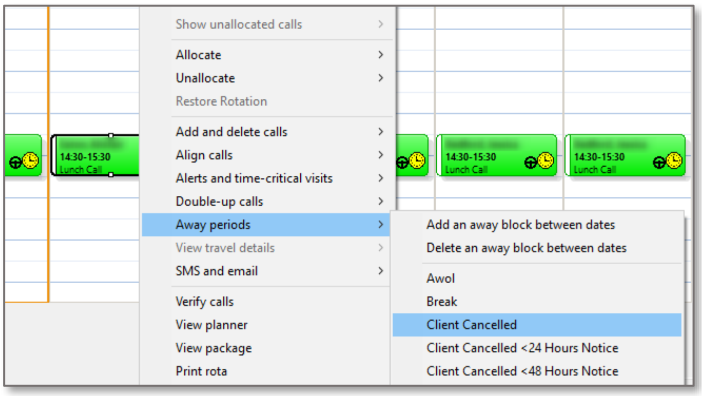
You would normally add an away period to the Rota when you have been made aware that a Client or Carer is going to be away i.e. Client is in respite or Carer is on holiday.

- Away periods can be added to an individual call or for a specific block of time
- Away periods always show blue if a Client is away and yellow if a Carer is away
- The reason for the away period will be displayed at the top of the day(s) in which the away period(s) show

Adding an Away Period to a Call

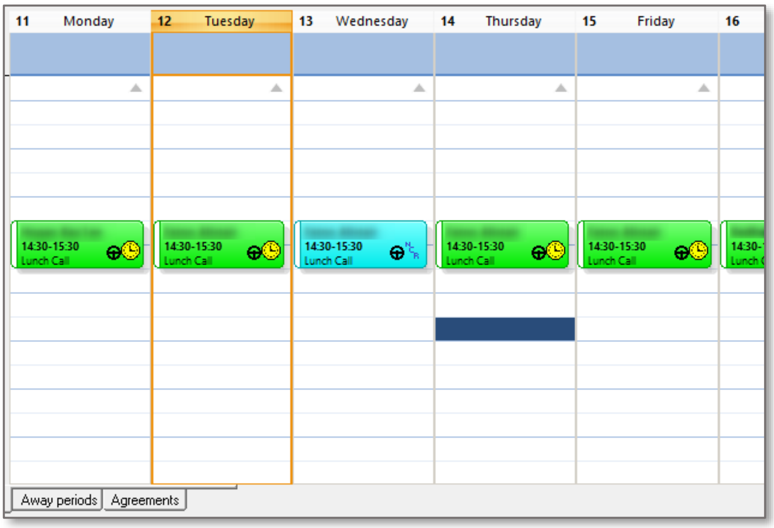
This method of adding away periods is commonly used for when a Client has cancelled a call.

1. Select the call on the Rota with a single **left click**
2. **Right-click** on the Rota and click **Away Periods**
3. In the sub-menu choose the most appropriate away reason



The away reasons list can be amended in the items screen

An away period will then be added to the call on the Rota.

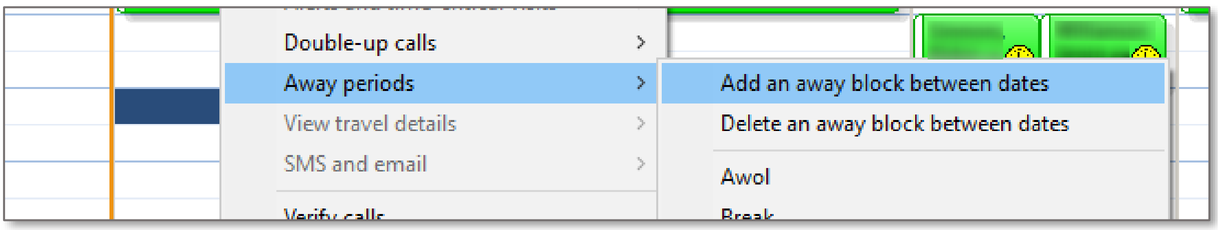


Adding an Away Block for a Client or Carer

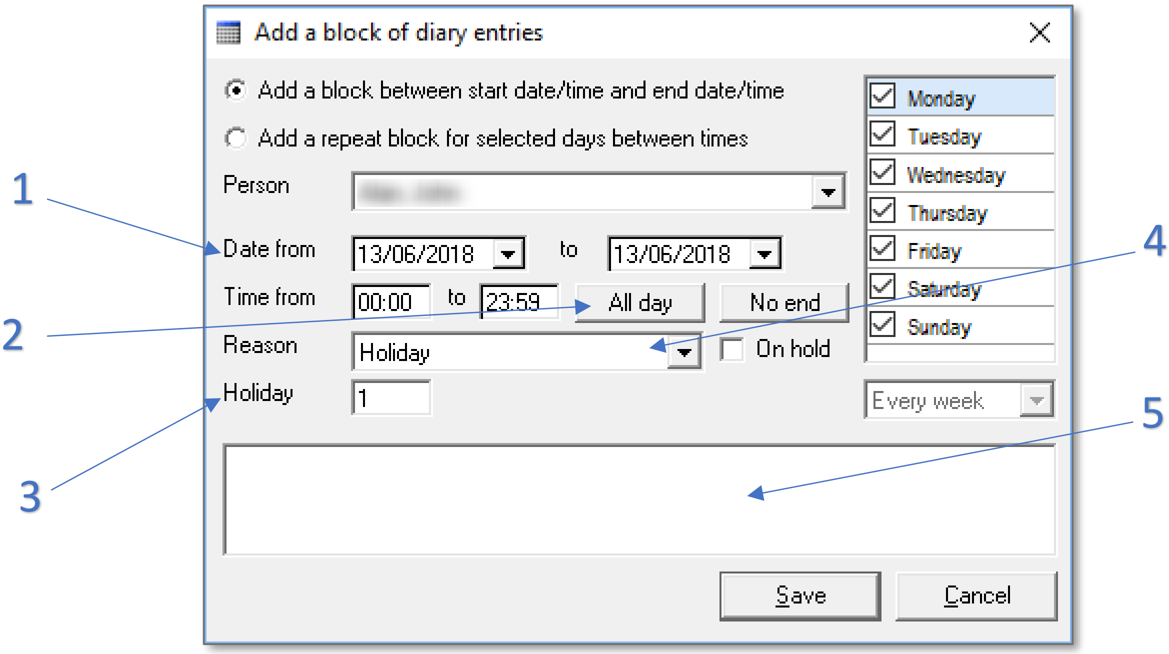
An away block could be added to a Client or Carer Rota for a number of different reasons. For example, Carer holiday, Carer sickness, Client in hospital, Client in respite etc.

<u>To Add an Away Block</u>

1. Go to the Rota for the Client or Carer where an away block needs adding
2. **Right-click** on the Rota
3. Click **Away Periods**
4. Select the first option in the sub-menu which allows you to **Add an away block between dates**

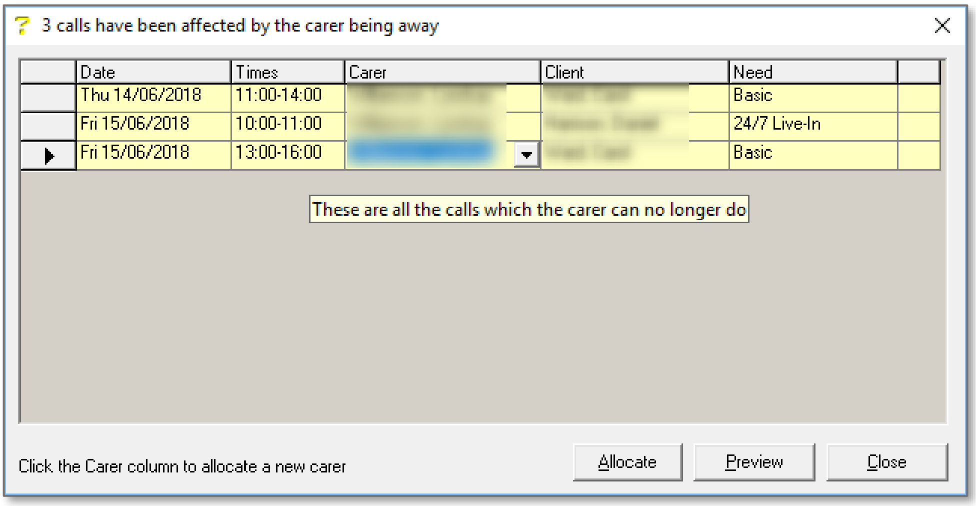


To Add an Away Block continued…



1	Specify a start and end date for the away period. If the end date is not known click the **No End** button
2	Specific hours within a day can be chosen for the away period. Alternatively, the **All Day** button can be used which enters 00:00 – 23:59
3	When adding away periods for Carer holidays use this box to deduct the correct amount of annual leave hours or days from the Carer's entitlement
4	Specify the reason for the away period here
5	To place a Client or Carer on Hold. Place a tick in the **On Hold** box
6	Notes can be added to show on a Client or Carer Rota

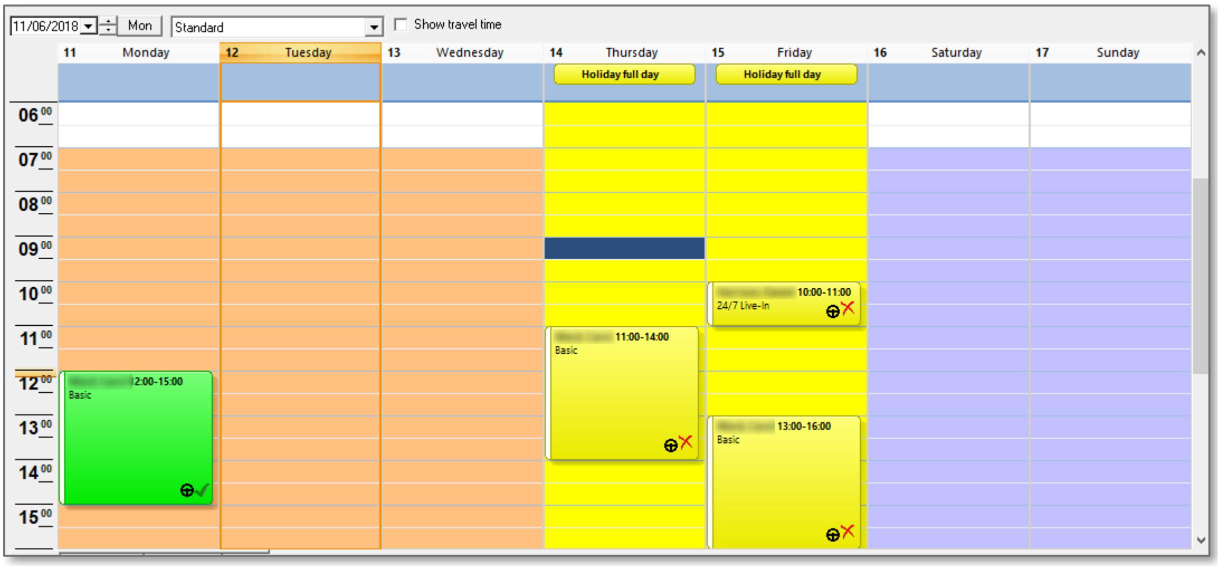
If a Carer is allocated to call when you add in an away period, you will be notified which calls will be affected. It is possible to allocate the affected calls to a different Carer from within this notification window by clicking on the drop-down arrow next to the Carers name and selecting an alternative Carer from the list.



If you do not wish to re-allocate the calls there and then they will automatically be added to the list in the unallocated calls screen.

To learn more about the unallocated calls screen please refer to the CareFree Day 1 Training Guide

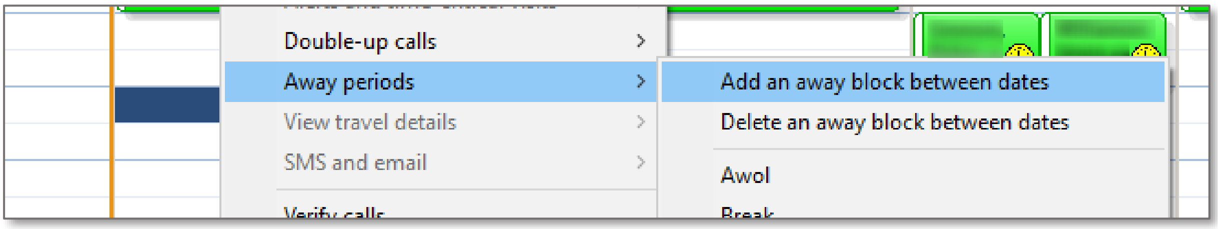
The away period will now display on the Rota.

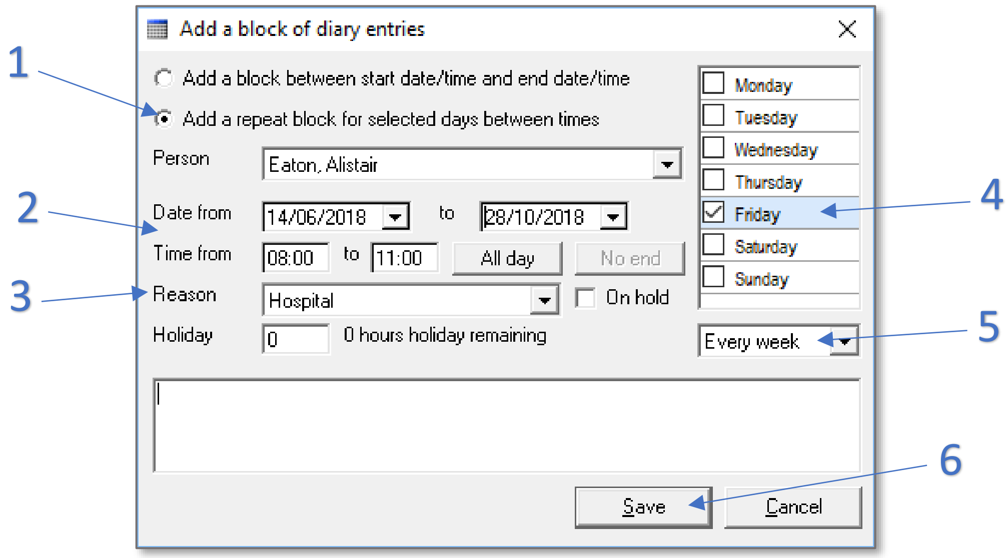


Adding Repeating Away Blocks

Repeating away blocks can be used for away periods which happen regularly on a Client or Carer Rota. Possible scenarios for the use of repeating away blocks would be a regular day of respite care for a Client or a Carer who regularly attends college on a specific day of the week.

1. Go to the Rota for the Client or Carer where an away block needs adding
2. **Right-click** on the Rota
3. Select **Away Periods**
4. Select the first option in the sub-menu which allows you to **Add an away block between dates**

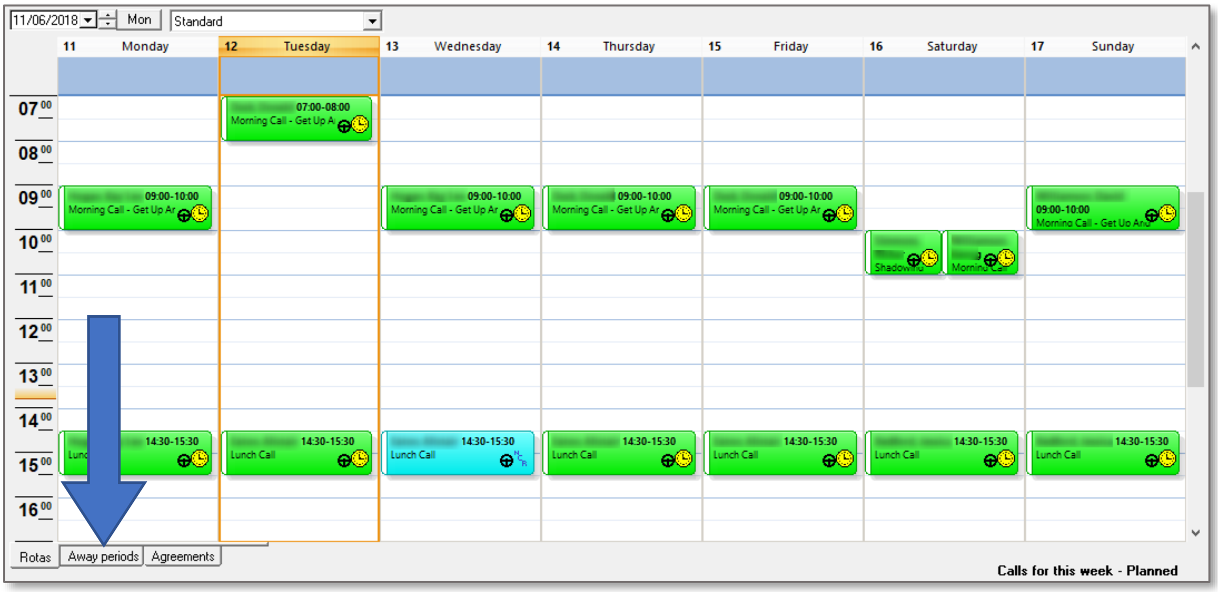




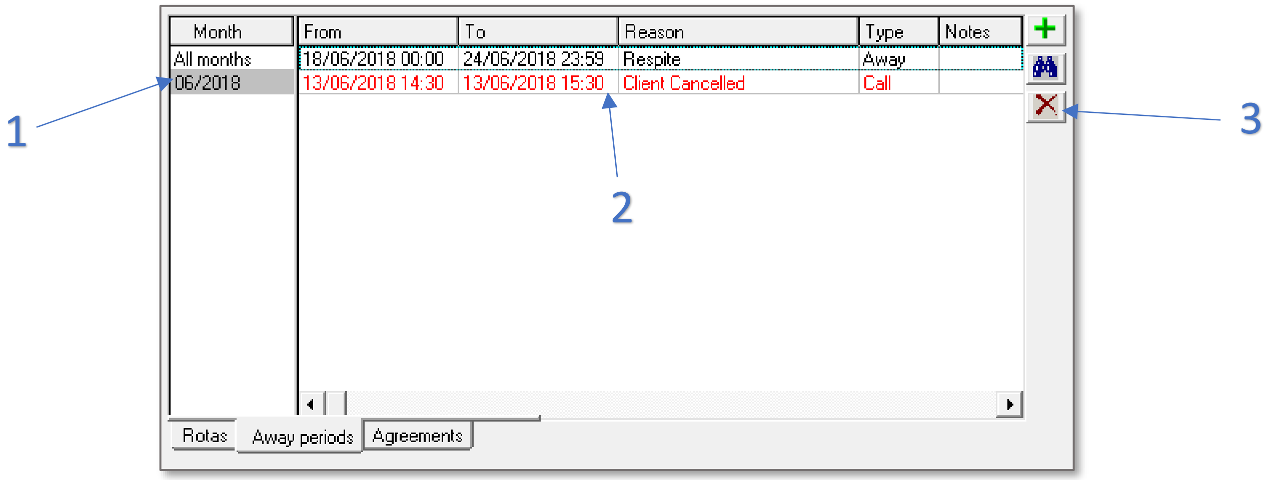
1	Ensure the options to **Add a repeat block for selected day between times** is selected
2	Ensure the date range covers the period during which the Client or Carer will be away
3	Select an appropriate reason using this drop-down menu
4	Choose which day/days the away period should be repeat on
5	Select the frequency with which the away period repeats
6	Click **Save** to save the away period

Deleting, Amending and Ending Away Periods

The most straightforward way of deleting or ending away periods from a Client or Carer Rota is by using the **Away Periods** tab in the Rota screen.



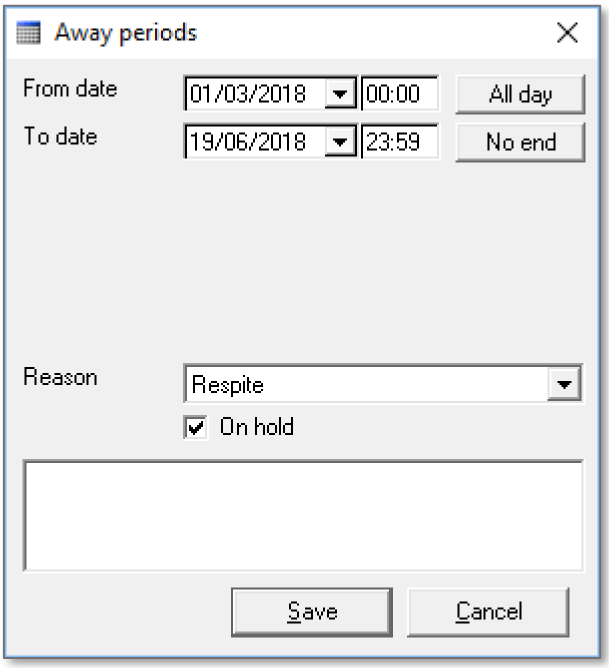
Use the away periods tab to access and amend away periods which have previously been added to the Rota. The tab also allows you to delete away periods which are no longer required.



1	Select the month the away period is in
2	Double click on an away period to open and amend details
3	With an away period highlighted click the icon to delete it

Where an away period has been added to the Rota with no end date the away periods tab can be used to access the details and to specify an end date when the Client/ Carer returns.

1. Go to the **Rota**
2. Open the **Away Periods** tab
3. Locate the away period and double click on it to view the details
4. Enter the end date of the away period in the **To Date** field
5. Uncheck the **On hold** option if the Carer/Client had been placed on temporary hold

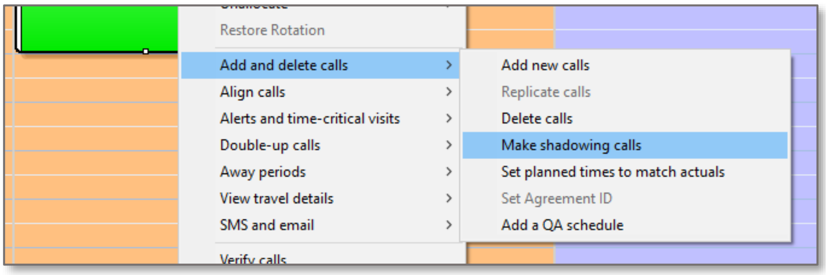


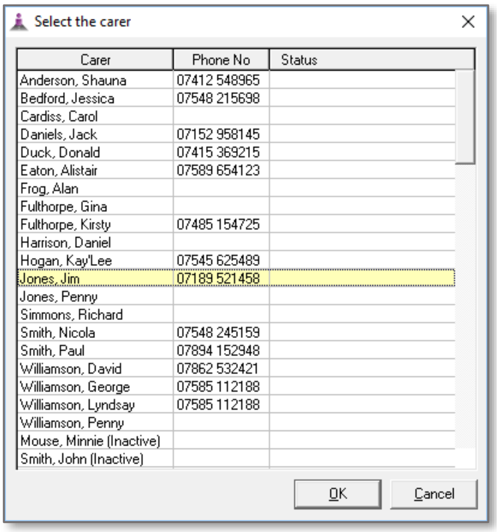
It is also possible to add away periods to Client or Carer Rotas from within the away periods tab. Simply click on the  icon to begin adding a new away period. This is useful for when you need to add Carer holidays a long way in advance as the Rota screen only displays data for the next 13-week period.

Shadowing Calls

Within the Rota screen you are able to allocate single or multiple calls to a Carer to shadow another Carer on their Rota.

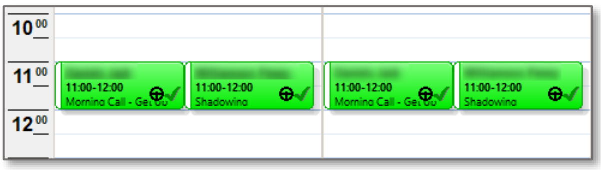
1. Open the **Rota** you wish to create shadowing calls on
2. Either highlight one call or hold down the **CTRL** key on the keyboard and left-click on each call you wish to select
3. A black outline will appear around the selected calls
4. **Right-click** on the Rota
5. Select **Add and Delete Calls**
6. Click **Make Shadowing Calls**





7. Select the Carer who will be shadowing on the selected calls
8. Click **OK**

9. Shadowing calls for all selected calls will then be added to the selected Carers Rota

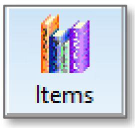


Adding Rotational Calls

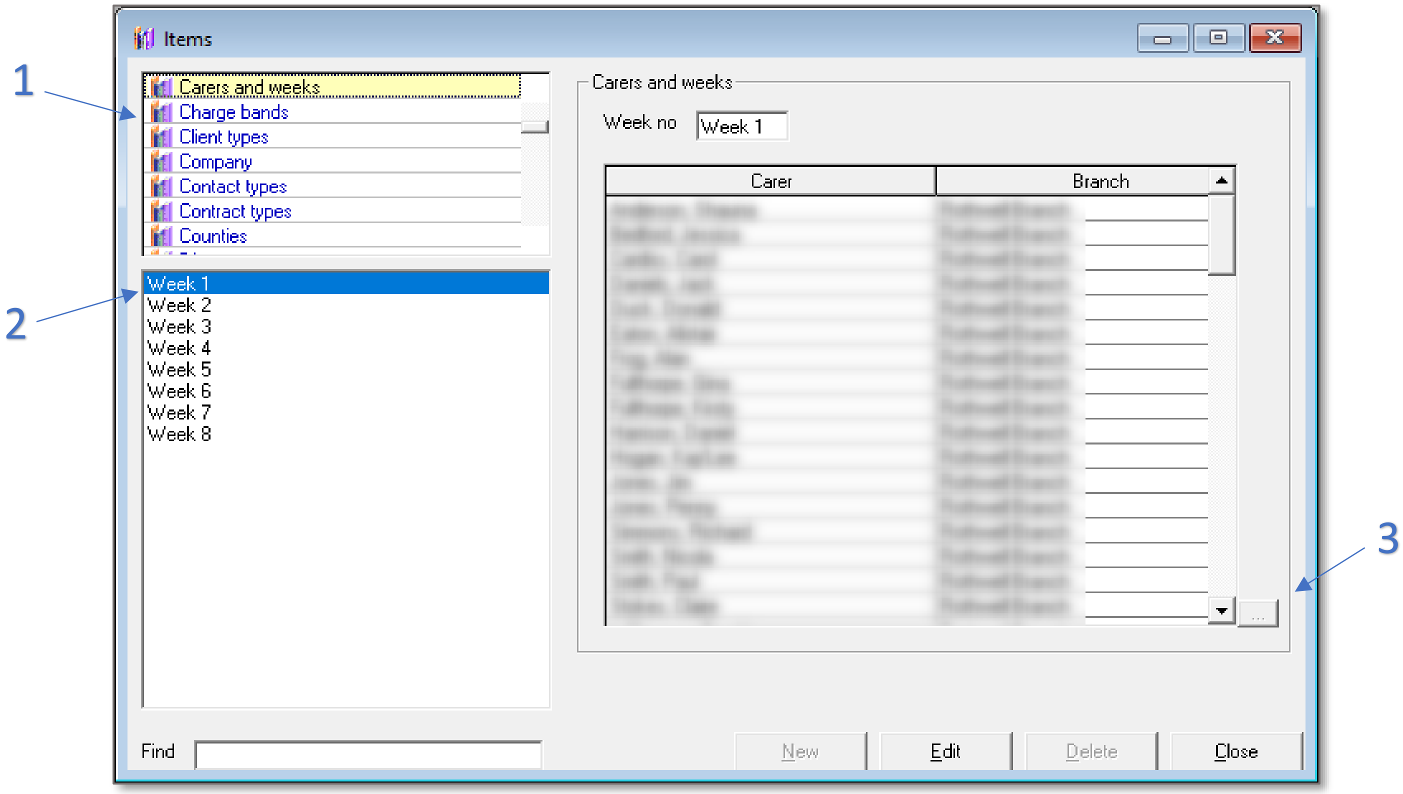
A Rotational call is one which occurs weekly but is covered by Carers who work in Rotation for example, Carer A covers week 1 Carer B covers week 2.

It is possible to make only certain Carers available to cover calls in specific weeks. Specify which Carers will work on each Rotation in the items screen.

Setting Carer Rotations in the Items Screen

1. Open the **Items** screen 

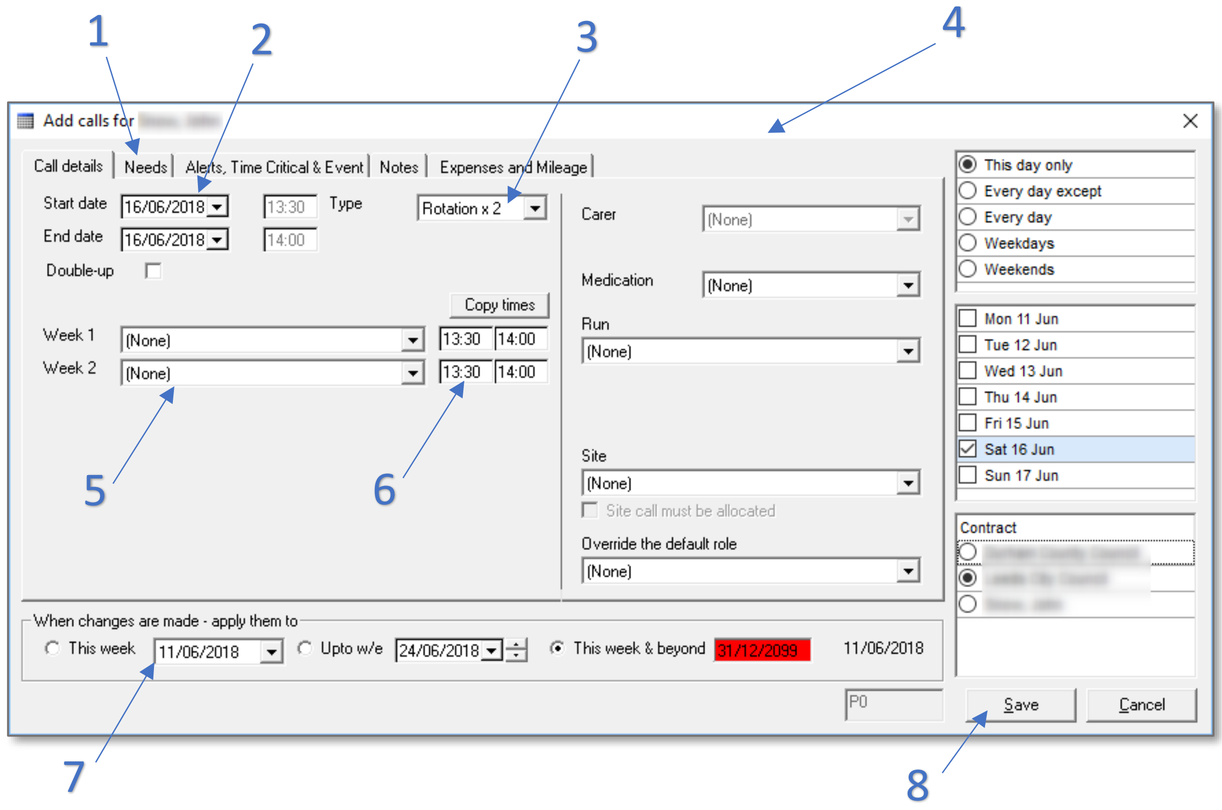
2. Select **Carers and Weeks** in the box at the top left of the screen



1	Select **Carers and Weeks** from the items list
2	Pick the Rotation week you would like to make Carers available for
3	Enter edit mode and click  to select the Carers you want to make available in the selected Rotation week

Adding a Rotational Call

1. Go to the **Rota** of the Client you want to add a Rotational call to
2. **Right-click** anywhere on the Rota
3. Select **Add and Delete Calls** from the right-click menu
4. Select **Add New Calls**



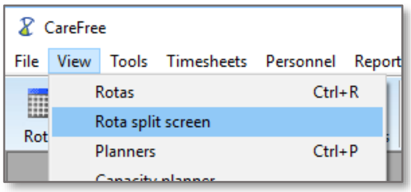
1	Specify at least one need for the call
2	Use the date field to specify the week that the call(s) will first appear on the Rota
3	Select the Rotational pattern you need in the Type menu
4	Complete all other call details as per the content covered in the **CareFree Day 1 Training Guide**
5	Choose the Carers who will cover the calls in the Rotation
6	Different call times can be specified for each week of the Rotational pattern
7	Select the appropriate working mode
8	Click **Save** to add the call

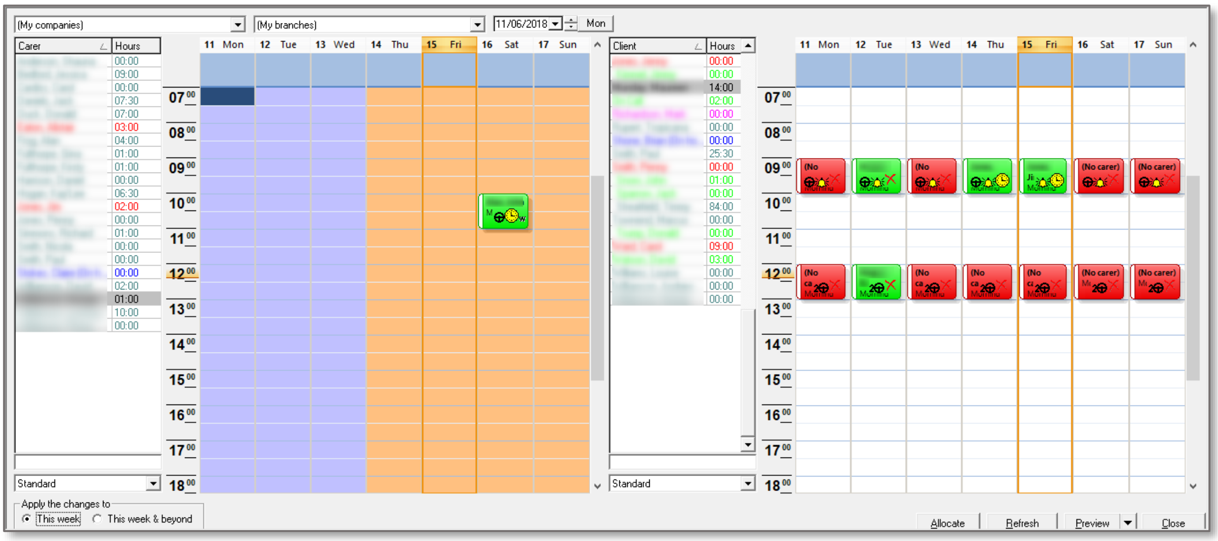
Once created you can see at a glance which week of the Rotation a specific call relates to as it will show a number in the bottom right of the call box as shown to the right.

Rota Split Screen View

The split screen view enables users to view the Rotas for both Clients and Carers simultaneously. To open the split screen Rota view:

1. Go to the **View** menu
2. Select **Rota Split Screen**



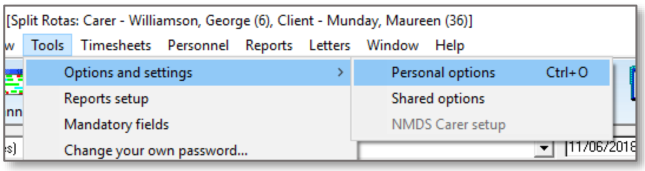


Carer Rotas are listed on the left of the screen and Client Rotas are listed to the right of the screen.

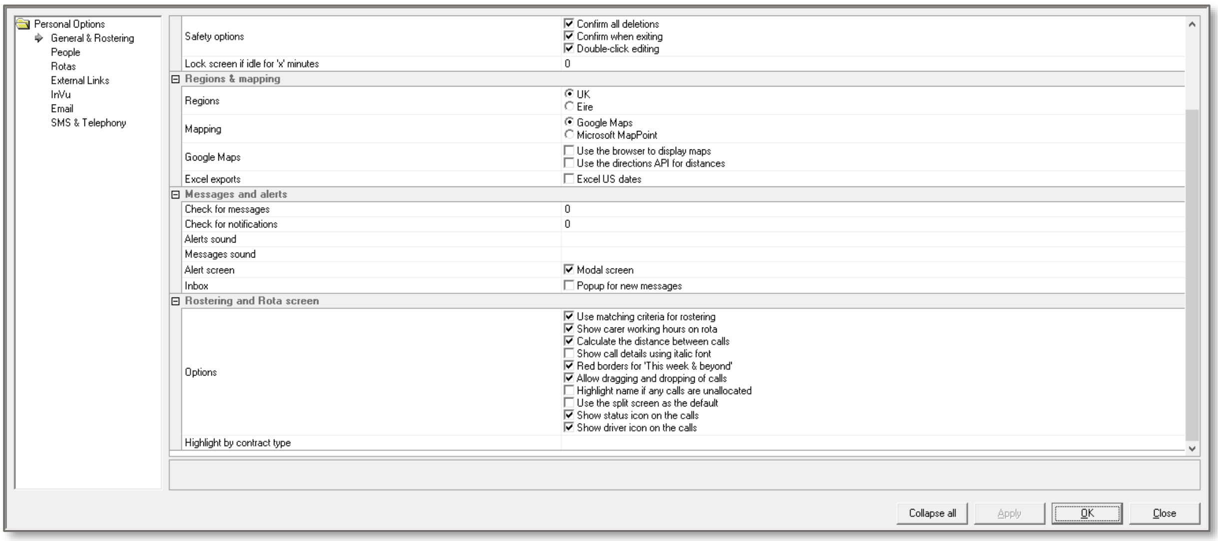
Set Rota Split Screen as the Default Rota View

Users can opt to use the split screen as their default viewing mode for the Rota. To change the default viewing mode:

1. Go to the **Tools** menu
2. Select **Options and Settings** and choose **Personal Options**



3. Ensure **General & Rostering** is selected on the left of the screen
4. Scroll down to the section **Rostering and Rota Screen** on the right of the screen
5. Tick the option named **Use the split screen as the default**
6. Click **OK** to save the changes

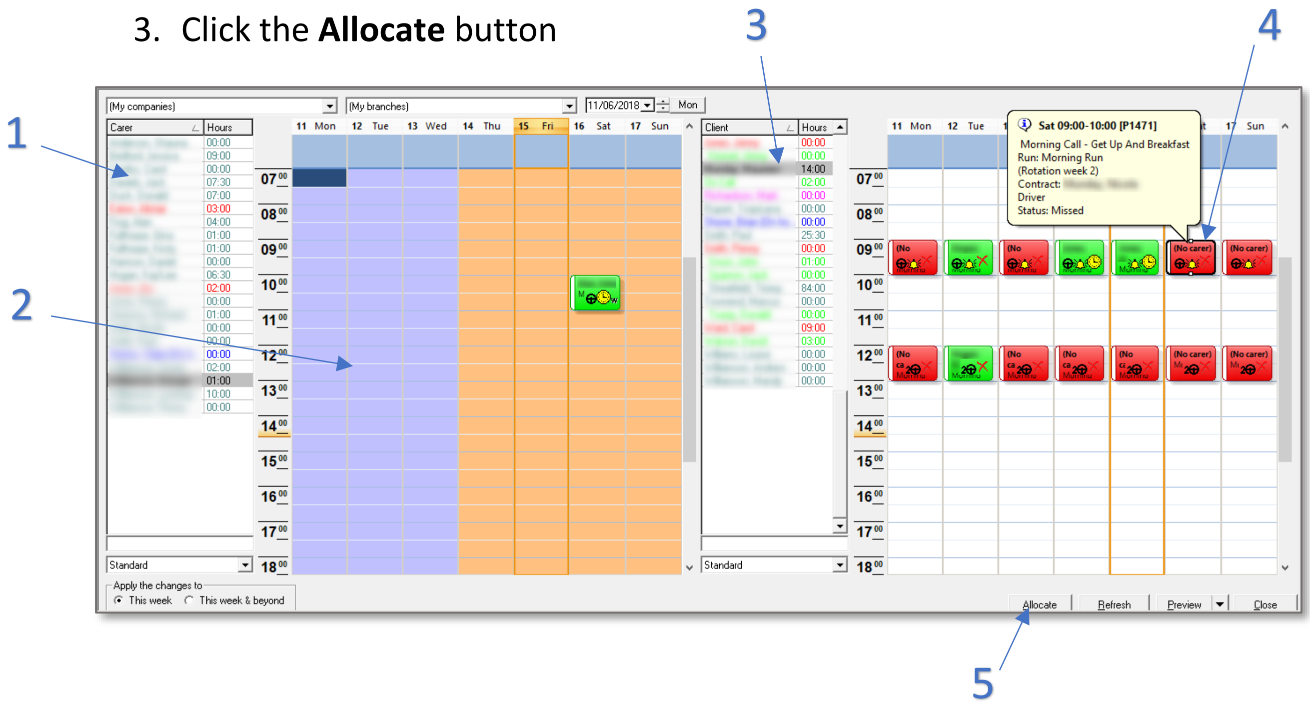


Once saved the next time the Rota is opened the split screen will launch.

Allocating Calls in Split Screen View

The split screen provides useful insight into Carer workloads and helps to identify suitable spaces in Rotas when users are attempting to allocate calls on Client Rotas. Users can simply move down through the list of Carers until an appropriate space is identified. Once an appropriate Carer has been found users can:

1. Select the Carer who you wish to allocate the call to
2. Select the call on the Client Rota
3. Click the **Allocate** button

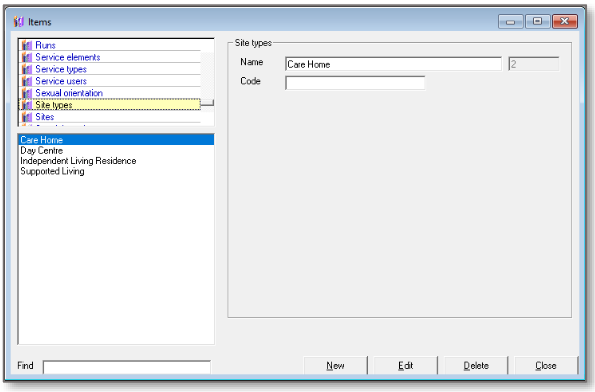


1	Select a Carer on the left of the screen
2	The selected Carers Rota has a suitable space for the unallocated call. Working hours are also shown on this screen. Refer to page 5 for more information on working hours
3	Select a Client on the right of the screen
4	Select the unallocated call to allocate to a Carer
5	Select **Allocate** to allocate the selected Client call over to the selected Carer's Rota

Site Types and Site Rota View

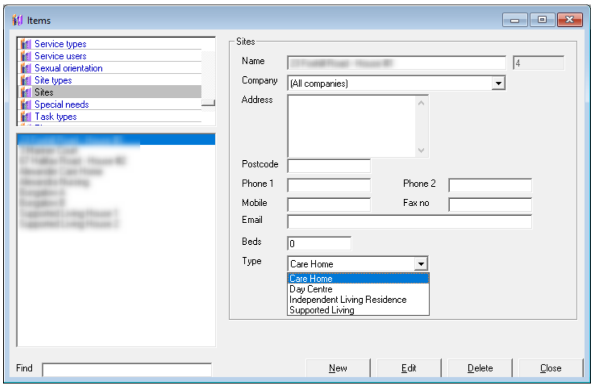
You may wish to use this functionality if you provide care to Clients at external sites and locations e.g. care homes, day centres etc. To begin using the Site Rota View, a list of alternative Sites and Site Types must first have been created within the Items screen:

1. Open **Items**
2. Go to **Site Types** in the list at the top left of the screen
3. Click **New** to create a new site type and complete the details in the boxes



Once the Site Types list has been updated, you can begin to store details for the Sites you require:

1. Open **Items**
2. Go to **Sites** in the list at the top left of the screen
3. Select **New** to create a new site and complete the details in the boxes



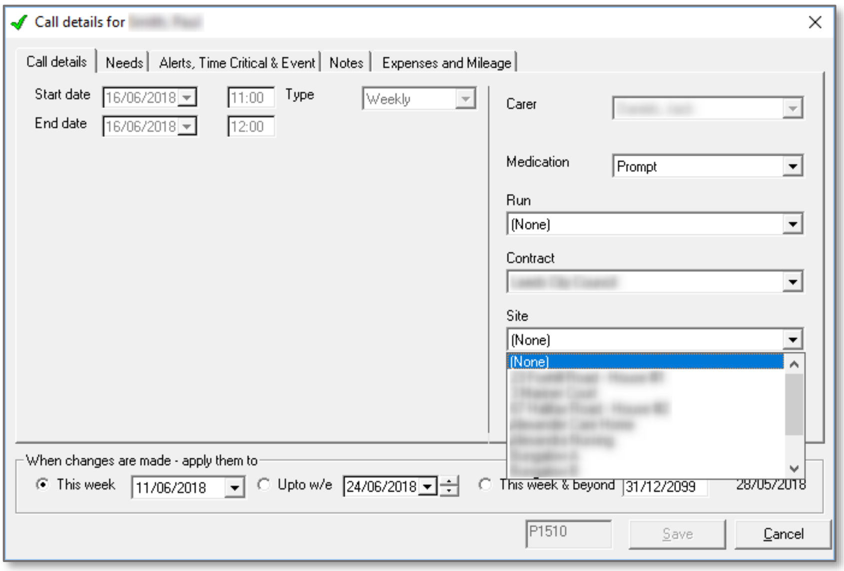
Add new sites to the appropriate site type category using the **Type** drop down menu.

Creating Site Calls on the Rota

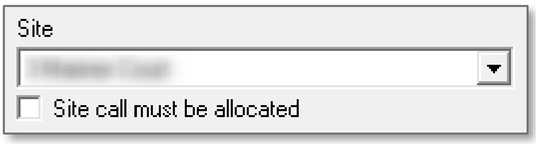
Once the list of sites has been populated, return to the Rota screen to begin categorising calls which take place at alternative locations.

1. Either double click single calls, or highlight multiple calls, right click and select **View Multiple Calls**

2. Select the site from the drop down menu



Calls allocated to different sites can remain unallocated if the **Site call must be allocated** box is left unchecked.

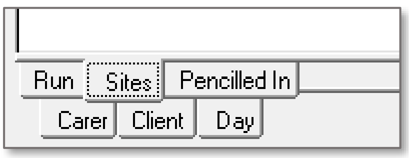


The option to leave site calls unallocated enables users to send multiple Clients to care homes/day centres for extended periods without having to allocate Carers to the calls. A Carer could be allocated to just one of the Clients but in reality, could be providing care to a number of Clients at the same time.

A tab has also been added to the Rota screen to enable users to view all Clients and calls for each site type and site. This can be found by:

1. Opening the **Rota**

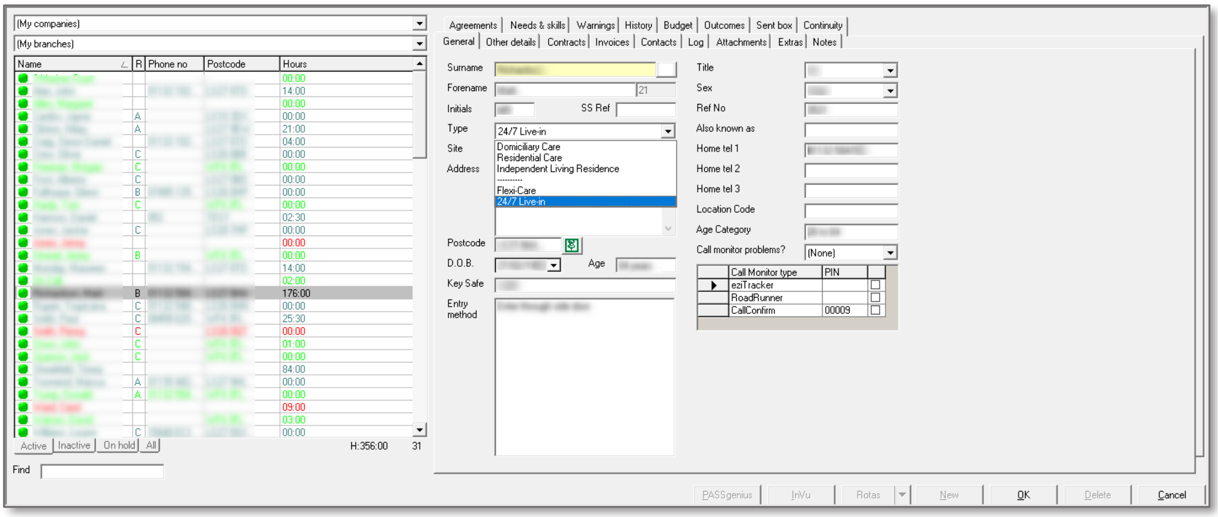
2. Clicking on the **Sites** tab



24/7 – Live-in Functionality

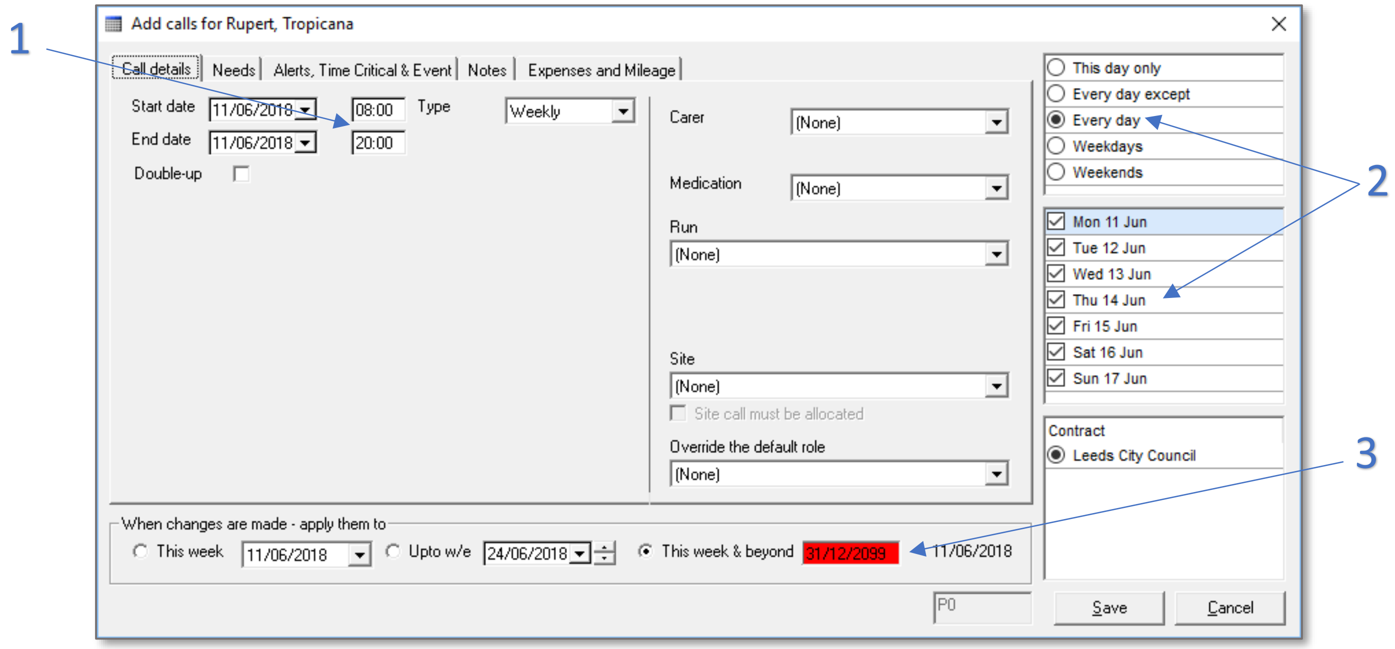
CareFree includes rostering functionality for organisations that deliver 24/7 live-in care to Clients. 24/7 live-in care packages can be viewed within the planner screen once calls have been added to the Rota.

A Client type of 24/7 live-in must be specified in the Client screen to enable users to create 24/7 live-in calls on a Client Rota.



Adding 24/7 Live-in Calls from the Rota

1. Open the **Rota**
2. **Right-click** on the Rota
3. Select **Add and delete calls** then **Add new calls**

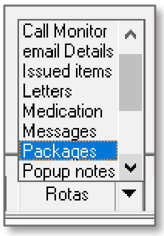


1	Specify the start time and end time of the shift the Carer will do at the Clients home.
2	Specify which days this shift needs to be added to
3	Ensure **This Week & Beyond** is selected to ensure the calls are added to every week going forward

You may need to repeat this process if there are numerous shift changes through the day

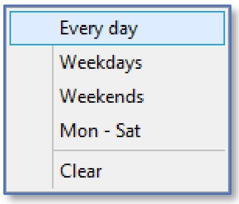
If the Carer stays at a Clients home for a number of days the start time must be set to 00:00 and the end time set to 23:59 to ensure the block of time appears on the Rota

Adding 24/7 Live-in Calls from the Package Wizard



1. Open the Client with 24/7 care
2. Go to the **Rota drop down** button and click **Packages**

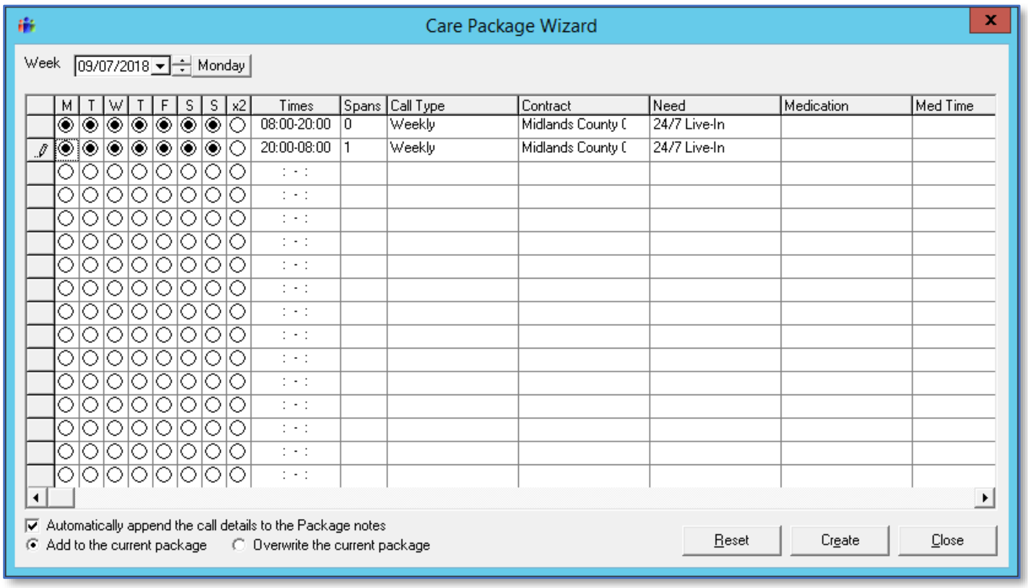
The package wizard is explained in greater detail in the Day 1 Training Guide – this section will explain how to add 24/7 Live-in calls through the package wizard



3. Click the pen symbol  to the left to highlight the whole row, then right-click and select **Every day**

4. Use the times to enter when Carers will be changing shifts. In the example below a Carer will be at the Clients home 8am – 8pm then another Carer will take over from 8pm – 8am

   If there are more shift changes than this example, add more rows in the package wizard

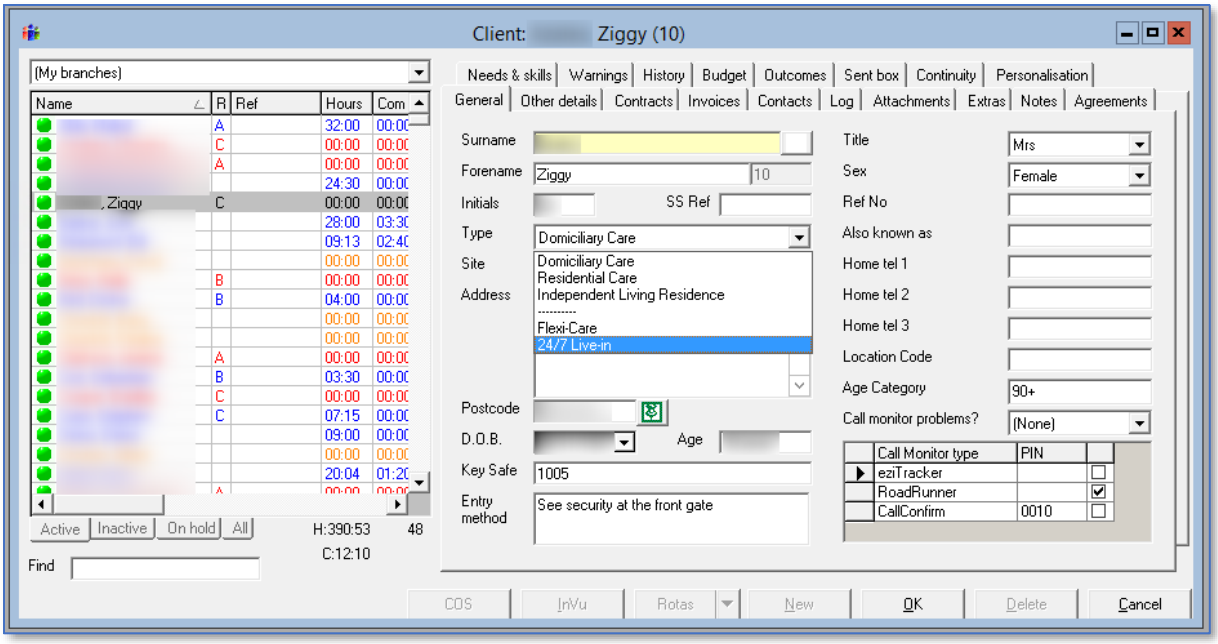


5. Click **Create** once completed

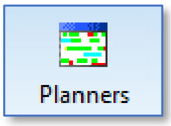
24/7 Live-in Planners Screen

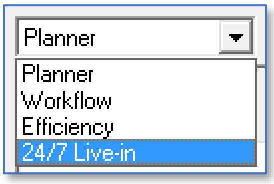
Once 24/7 Live-in calls have been created using the Rota, it is possible to view overall live-in packages in the planner screen. To get the packages to display in the planner, you must first change specify which Clients you provide 24/7 live-in care for.

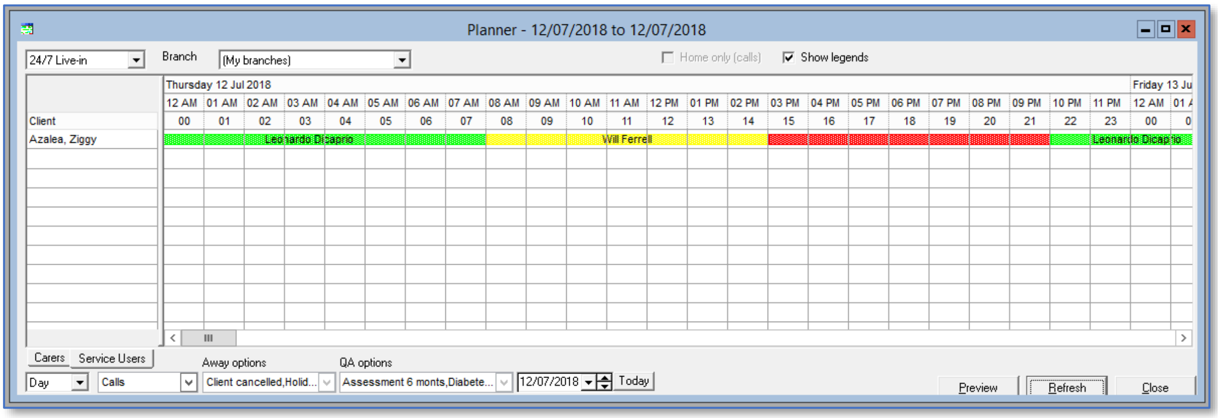
1. Open the **Clients** screen
2. In the general tab change the **Type** drop-down box to **24/7 Live-in**



Once the Client types have been changed and the packages have been added, the 24/7 live-in planner will be available to view.

1. Open the **Planners** screen 

2. Select **24/7 Live-in** using the drop-down menu at the top left of the screen 



3. Ensure the option to view **Calls** is selected in the drop-down menu at the bottom left of the screen

4. Use the **Refresh** button at the bottom right of the screen to refresh the data

The Planner screen is explained in more detail on page 47 of this training guide.

Capacity Planner Screen

The Capacity Planner screen is available to assist with planning and helps decision making when considering whether or not a new Client/care package can be accommodated with current workloads. To open the Capacity Planner

1. Go to the **View** menu
2. Click **Capacity Planner**

The classification of low, medium and high capacity can be changed by altering the values in the boxes at the top of the screen.

Users can choose display the capacity planner based purely on the number of Carers not currently allocated to calls at a specific time or can opt to include Carer working hours if these have been specified within CareFree. Select or de-select the working hours tick box to change the view.

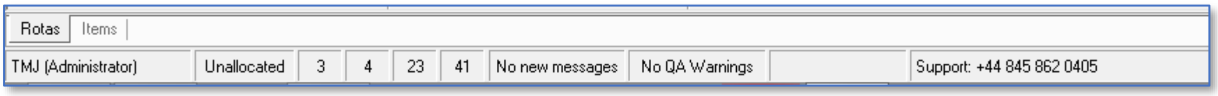
More on the Unallocated Screen

In addition to the standard view of the unallocated screen which we looked at during day 1 of our training, there are several extra views/screens which can provide further insights and assistance when attempting to cover unallocated calls.

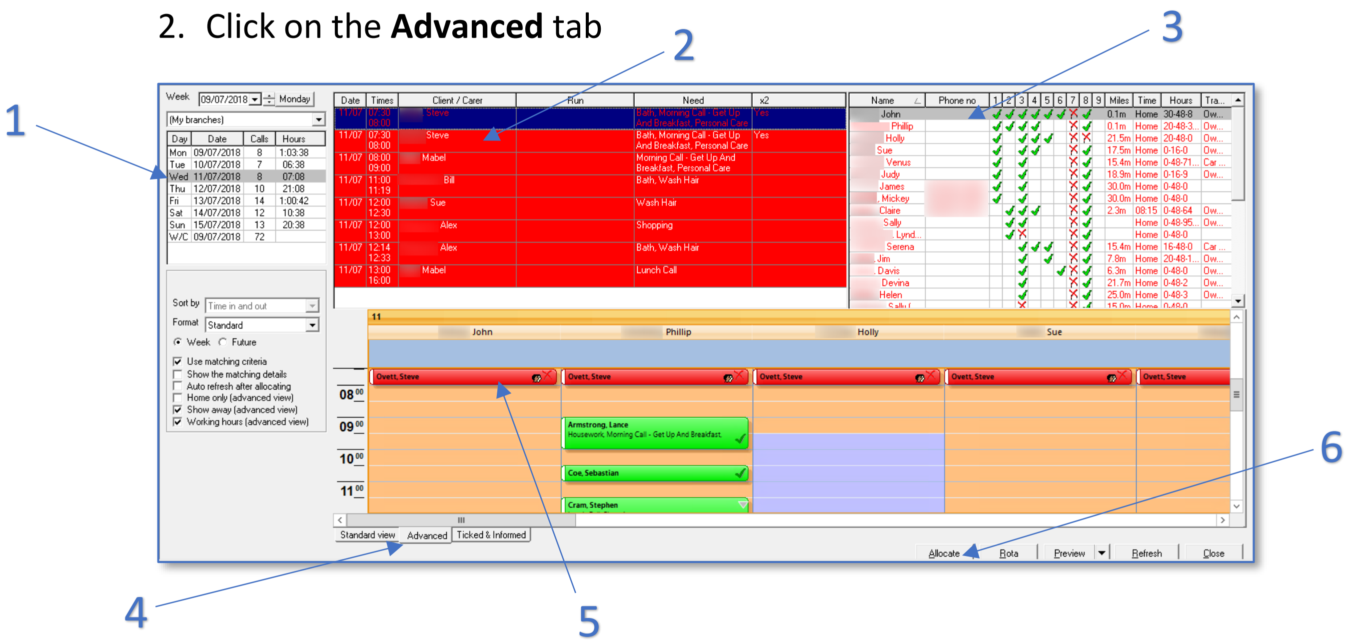
Advanced View

The advanced view of the unallocated screen enables a coordinator to see how an unallocated call would fit into their Carers current Rota and provides access to the matching criteria data from the call allocation screen.

1. Double click **Unallocated** in the status bar at the bottom of the screen



2. Click on the **Advanced** tab



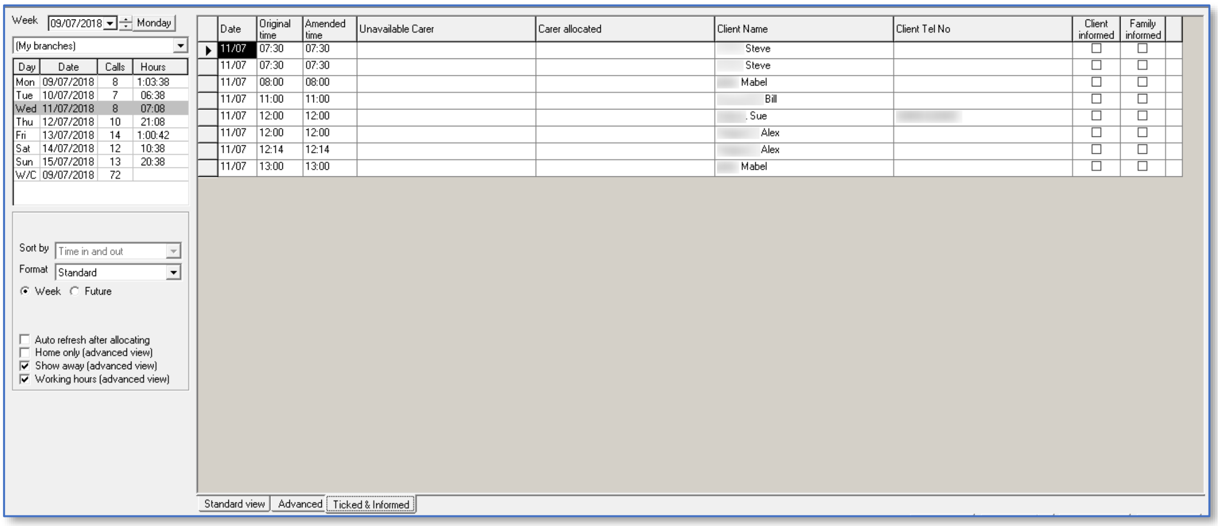
1	Select a week and day to view unallocated calls for
2	Click an unallocated call in the list to highlight it and begin looking for a suitable Carer
3	The advanced view allows you to see CareFree's matching criteria here
4	Click on the advanced tab to open this view of unallocated calls
5	The red call is the one you are trying to allocate. See how it fits into your Carers existing Rotas here
6	When you have decided who will cover the call click the Carers name in the list then click **Allocate**

Ticked & Informed Tab

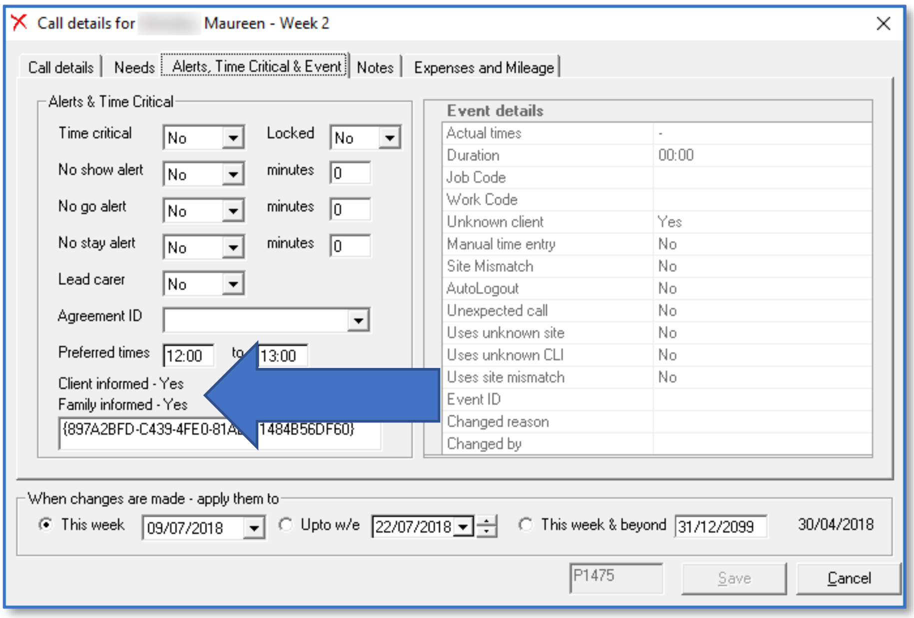
This allows users to tick if the Client or family have been informed of a new Carer being allocated to a call. It is also possible to override the original start time with an amended one.

1. Double click on **Unallocated** in the status bar at the bottom of the screen

2. Click on the **Ticked & Informed** tab



3. Tick **Client Informed** and/or **Family Informed** if changes have been made to the call. This is recorded in the call details



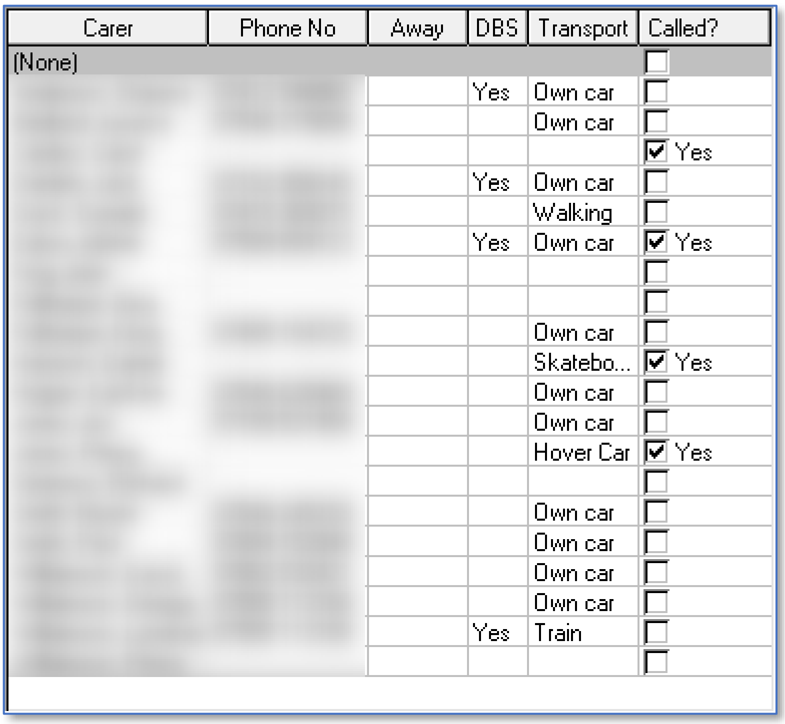
Tracking Requests for Cover

The unallocated screen also provides the option to tick which Carers have been contacted about covering a call from within the standard view tab.

1. Open the **Unallocated** screen
2. Click into the **Carer** column then use the drop-down arrow to track cover

Date	Time in	Time out	Carer	Client	Run	Need	Pencilled In / Auto	Postcode	Driver
11/07	00:00	08:00				24/7 Live-In			Yes
11/07	08:00	20:00				24/7 Live-In			Yes
11/07	08:30	14:30				Basic			Yes
11/07	09:00	10:00			Morning Run	Morning Call - Get U			Yes
11/07	12:00	13:00			Morley Run	Morning Call - Get U			Yes

3. Use the tick boxes in the **Called?** column to mark off the Carers who have been contacted to request cover

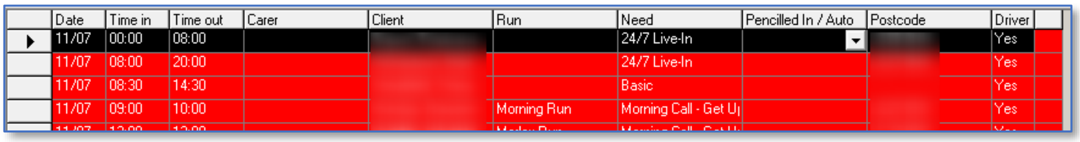


Carer	Phone No	Away	DBS	Transport	Called?
(None)					
			Yes	Own car	
				Own car	
					Yes
			Yes	Own car	
				Walking	
			Yes	Own car	Yes
				Own car	
				Skatebo...	Yes
				Own car	
				Own car	
				Hover Car	Yes
				Own car	
				Own car	
				Own car	
				Own car	
			Yes	Train	

Pencilling in Carers

It is possible to pencil in Carers to cover calls from within the unallocated screen. Once a Carer has been pencilled in, users will need to either confirm the allocation in the Rota screen, or select a different Carer using the unallocated screen.

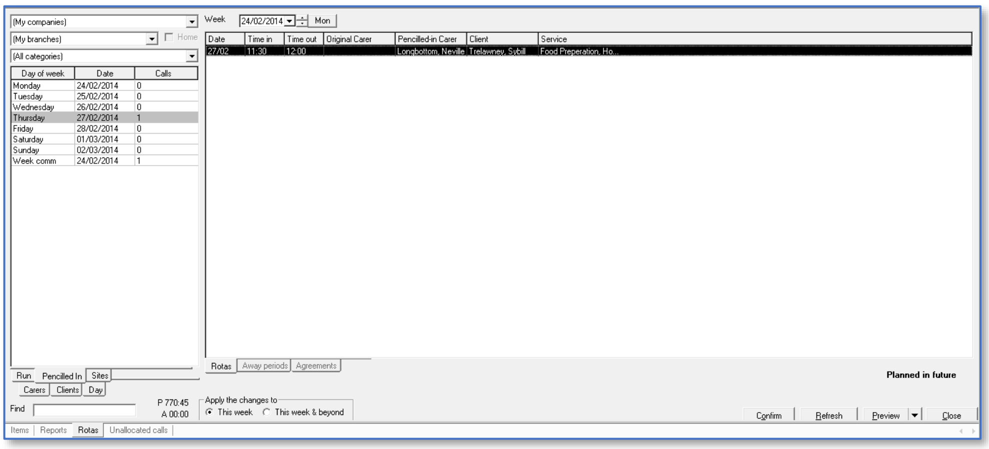
1. Open the **Unallocated** screen
2. Locate the call you wish to pencil in a Carer for
3. Click into the **Pencilled in / Auto** column, then use the drop-down arrow to select the Carer



4. The same screen will appear, as it does when you are tracking cover for calls. This will not allocate the call to the Carer but will attach them to the call ready for confirmation

Once a Carer has been pencilled in to a call, they are then confirmed from the Rota screen.

1. Open the **Rota** screen
2. Go to the **Pencilled in** tab

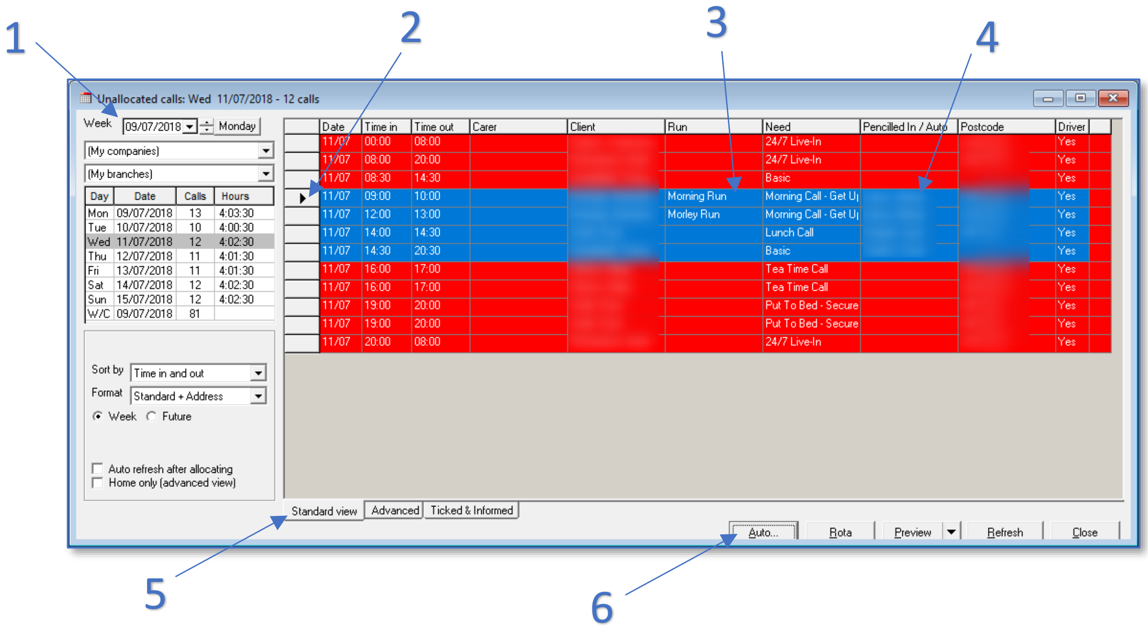


3. Select the call you wish to confirm
4. Click the **Confirm** button to confirm the allocation of the Carer

Auto Allocate Carers

The auto allocation function will pencil in Carers for unallocated calls, based on the 9 matching criteria within the CareFree rostering system. When auto allocating, Carers are only pencilled in allowing users to check the suggestions made by CareFree and either accept or reject the recommended allocations.

Open the **Unallocated** screen and select the **Standard** view tab



1	Use the date controls to locate the calls you wish to auto allocate
2	To select a single call to auto allocate click I the box to the left of the date. Use the CTRL button to select multiple calls
3	Selected calls are highlighted in blue
4	The suggested Carers will appear in the **Pencilled In / Auto** column
5	Ensure the **Standard** view tab is selected
6	Click the **Auto** button to auto allocate Carers to calls

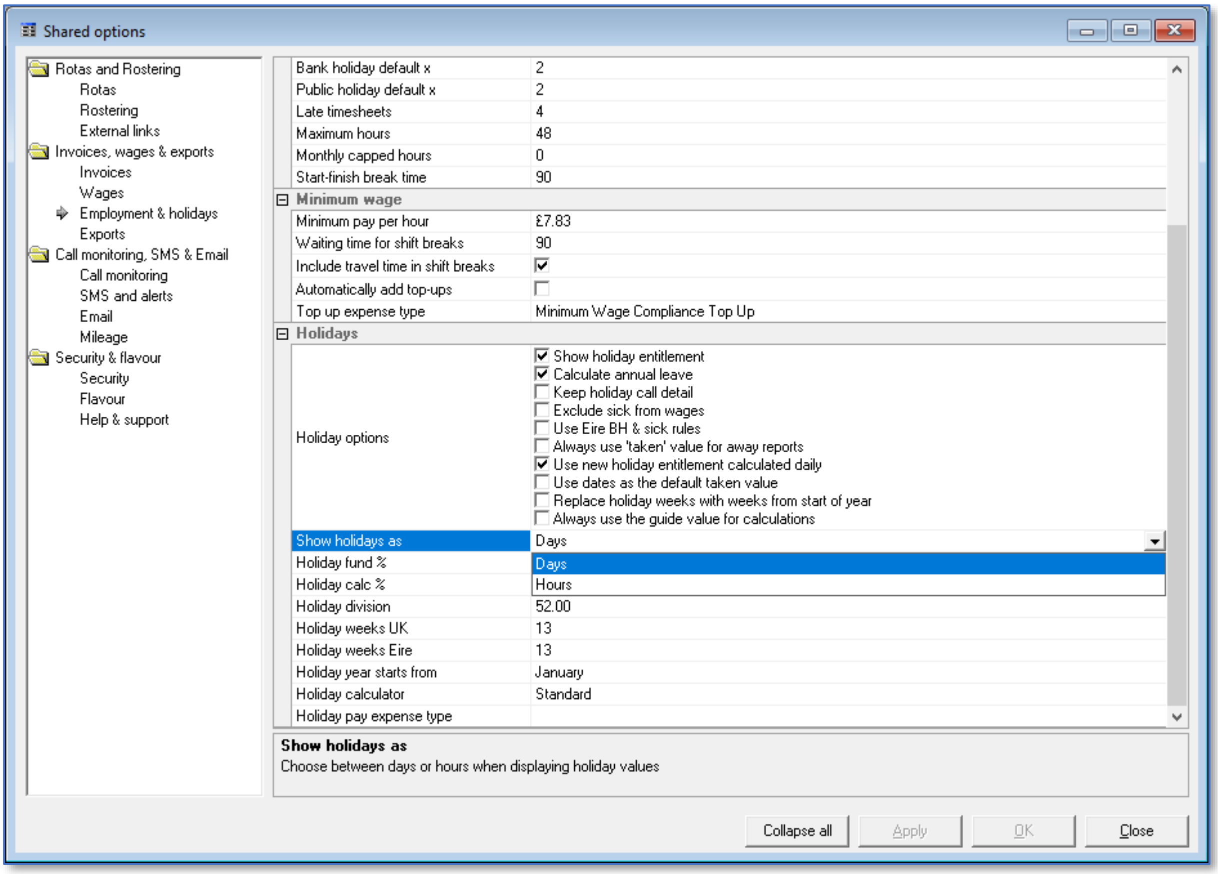
To confirm the allocation of Carers who have been auto allocated follow the same process for confirming pencilled in Carers described in the previous section of this guide.

Holidays

Holiday Entitlements

It is possible to specify whether holiday entitlements are calculated in hours or days within the CareFree options and settings.

1. Go to the **Tools** menu
2. Go to **Options & Settings** and select **Shared Options** in the submenu
3. Select **Employment & Holidays** in the list on the left-hand side of the screen
4. In the options for holidays select **Show holiday as** and set it to either days or hours using the drop-down menu

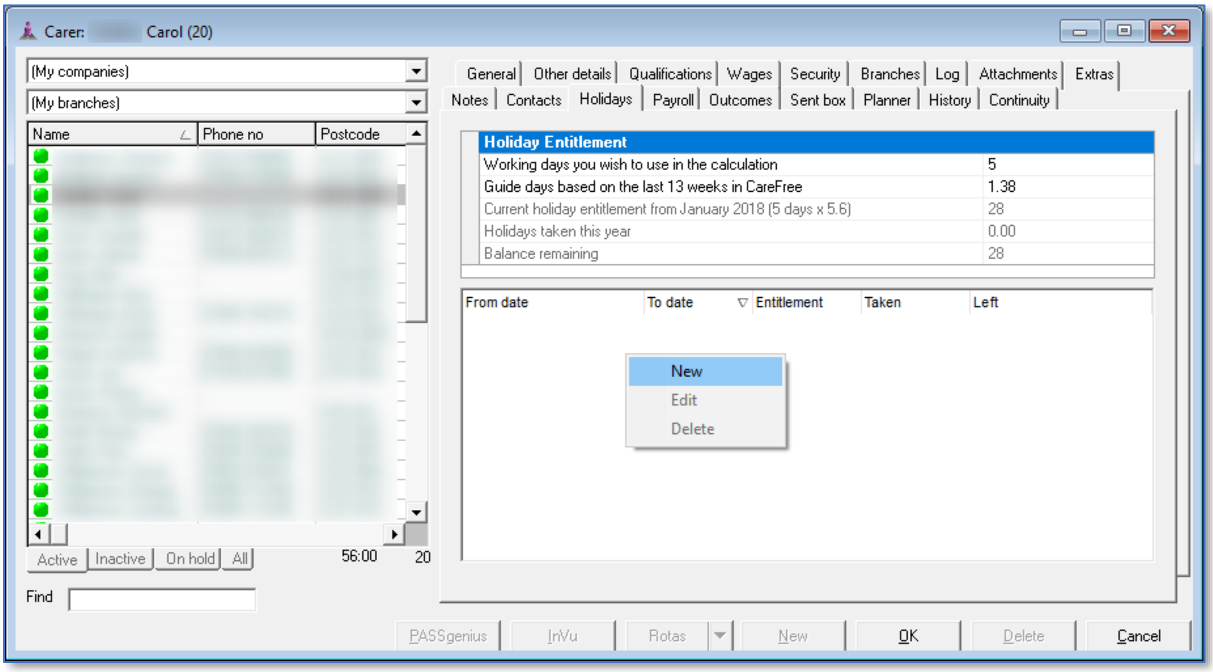


Deducting Holidays Taken from Entitlements

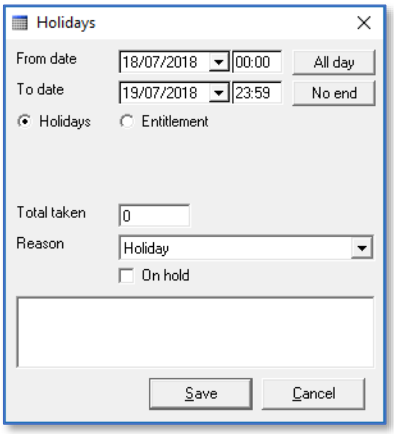
There are two main ways in which holidays can be deducted from a Carers entitlement.

Using the Carers Holidays Tab

1. Open the **Carers** screen
2. Go to the Carer who is taking holiday
3. Click on the **Holidays** tab
4. Click **Edit**
5. Right-click in the white box
6. Select **New**



7. Ensure the **Holiday** radio button is selected

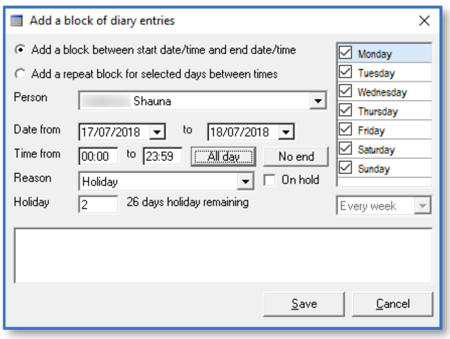


8. Fill in the details for the holiday, specifying the from and to date, the number of hours/days to be deducted in the **Total Taken**
9. Using the **Reason** drop-down box choose 'Holiday' then click **Save**
10. The holiday will be deducted from the entitlement and an away period will be added to the Carers Rota

Adding an Away Period on the Rota

Use page 8 of this guide for best instructions on how to add an away period via the Rota. Ensure that you add the following information when adding the away period.

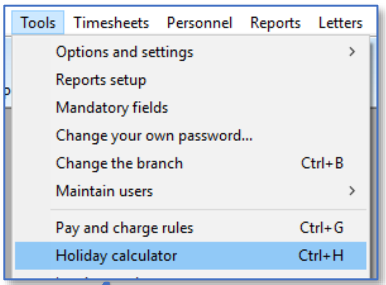
1. Using the **Reason** drop-down box choose 'Holiday'



2. Deduct the correct number of hours/days of holiday from the Carers entitlement

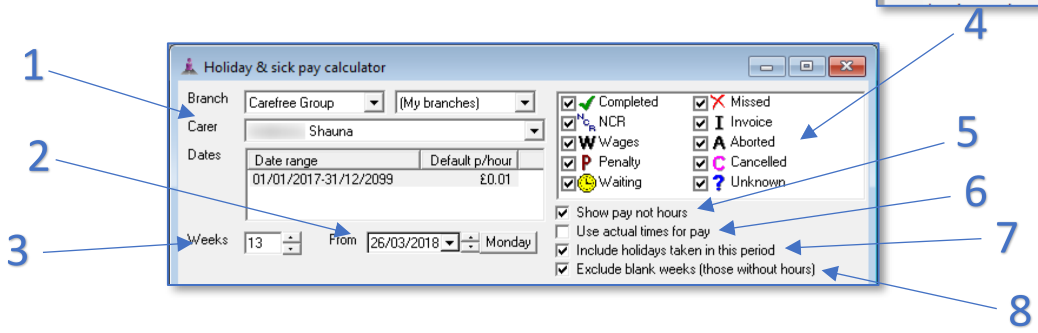
Holiday Pay Calculator

The holiday calculator enables users to see the average amount of hours or pay a Carer has earned over a specific time period. It can also be used to add pay as an adjustment to Carer wages based on the calculation it performs.



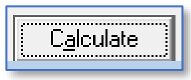
Using the Holiday Pay Calculator

1. Open the **Tools** menu and select **Holiday Calculator**



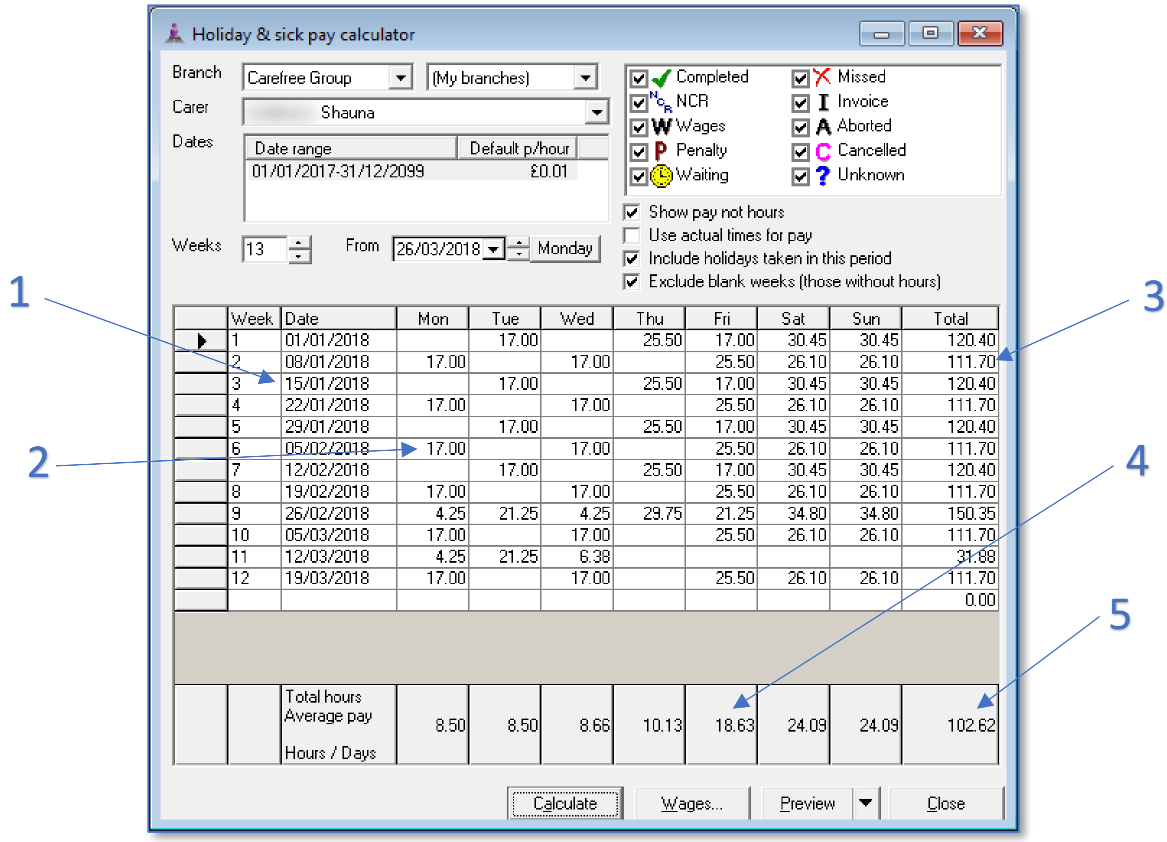
1	Select the relevant branch and Carer
2	Select the date from which the calculation will be made
3	Set the number of weeks to calculate average pay/hour over. The default is set to 13 as this tends to be the most common working practice
4	Tick the relevant call statuses to include into the calculation
5	Tick **Show pay not hours** to show the average pay of each day/week, untick this box to show average hours of each day/week
6	Tick **Use actual times for pay** to look at actual times rather than planned
7	Tick **Include holidays taken in this period** to include annual leave that has been taken by the Carer in the date period selected
8	Tick **Exclude blank weeks (those without hours)** to exclude any weeks within the selected date period where no hours have been worked by the Carer

2. Click **Calculate** to start the holiday pay calculation



There must be some finalised wage sheets in the Carers records for the Holiday Pay Calculator to work out the calculation

The following calculation has been worked out with pay instead of hours. If the calculation is worked out with hours the principal is the same the calculation will show hours instead of currency.

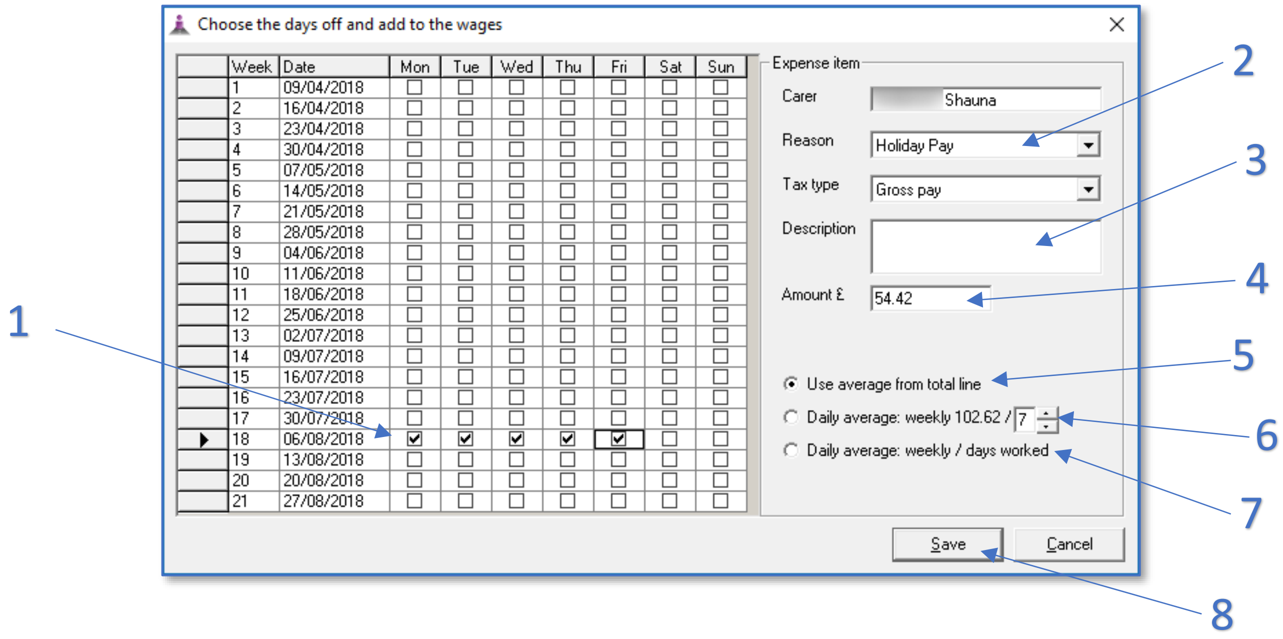


1	Each week included into the calculation is displayed here
2	The calculation will work out how much the Carer has earned/worked on each day, which is displayed here
3	The total number of hours/pay for that week is calculated at the end of the table showing how much the Carer has earned/worked
4	The total number of hours/pay on each day of the week (Mon-Sun) are worked out to display the average pay/hours
5	The totals of the week's hours/pay are calculated to display the average pay/hours over the 12 weeks

Adding Holiday Pay/Sick Pay to a Wage Sheet

If the holiday pay calculator is being used for holiday pay and/or sick pay the following option can be used to add the pay to the Carers wage sheet.

Click the **Wages** button to add an expense to the Carers wage sheet.

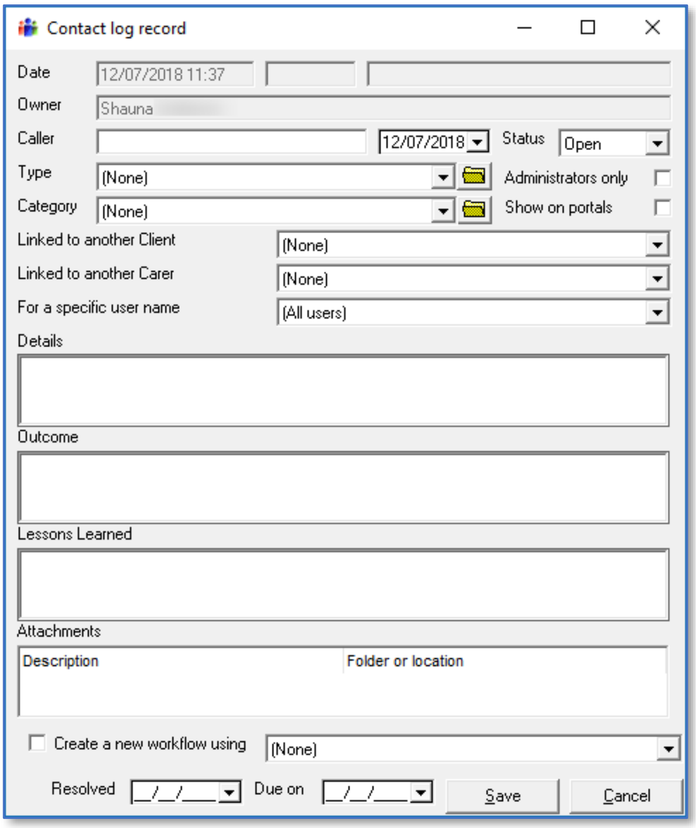


1	Tick which days the Carer will not be working where they will be paid
2	Use the **Reason** drop-down box to choose what expense reason will appear on the Carers wage sheet
3	Use the **Description** free text box to enter any additional information in about this expense
4	The amount will be calculated when you select a date. This will change depending on what option you set underneath
5	**Use the average from total line** will use the average totals from each day. Looking back on the screenshot from page 38 at point 4 each average for Mon-Fri was added up giving a total of £54.42
6	**Daily average: weekly 102.62 / 7:** This setting is working out what the Carer has earnt on a daily basis by taking the average weekly pay of 102.62 (calculated in the previous screen) then dividing this by the number of days worked (this number can be amended). In this example 102.62 / 7 is £14.66. As 5 days have been ticked the total would work out as £73.30 (£14.66 * 5)
7	**Daily average: weekly / days worked:** This setting is similar to the previous option but the number of days worked out is worked out automatically
8	Click **Save** to add the expense to the Carers wage sheet for the dates you have selected on point 1. The expenses will appear in additions and adjustments

Linking to Documents, Policies & Procedures

CareFree provides the option to link to your organisations guidance documents, procedures or policies in various places throughout the database. These links are designed to assist employees when dealing with issues which require a set process to be followed.

For example, if a complaint is received which needs recording as a log entry in a Client record. It is possible, to create a quick link to your complaints procedure document to provide appropriate guidance for the co-ordinator creating the log. Once the link has been created the co-ordinator can click the icon in the log entry screen to access the complaints procedure document.



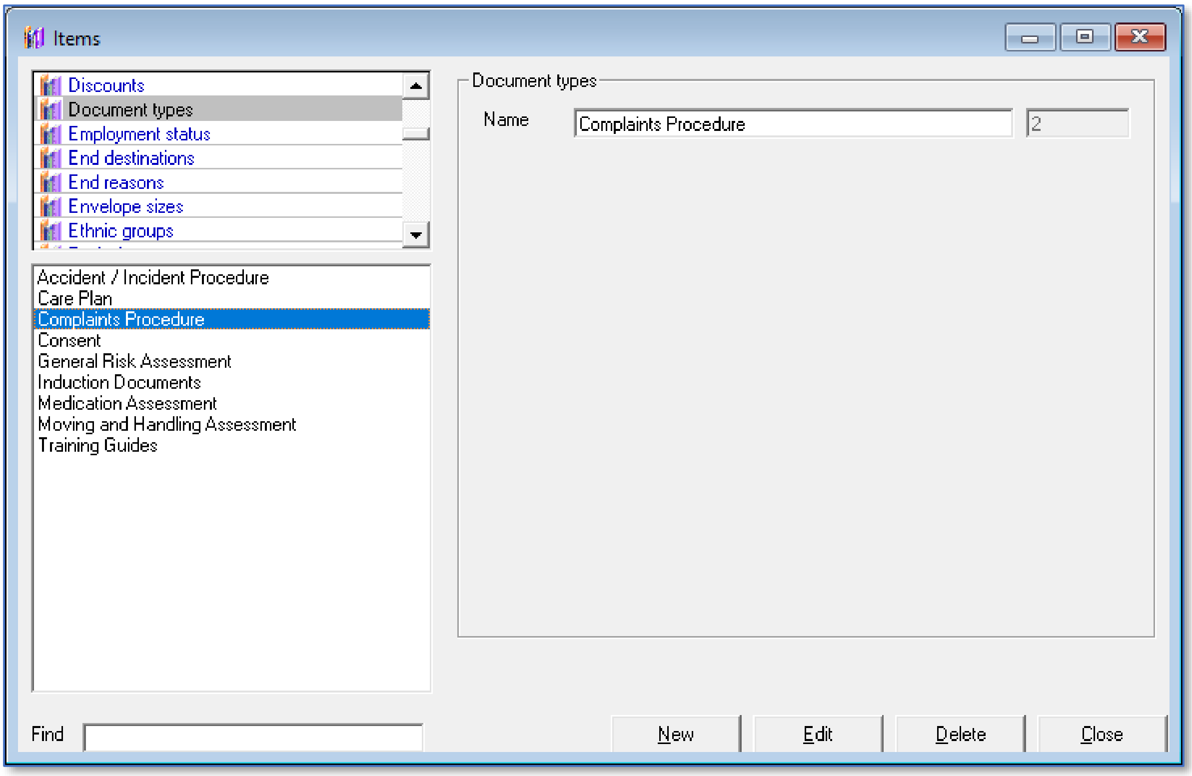
The process of creating links to documents, policies and procedures involves two stages:

- Specifying document types
- Configuring the links

Specifying Document Types

First you must specify what type of documents you wish to add into CareFree. You can create document types via the Items screen:

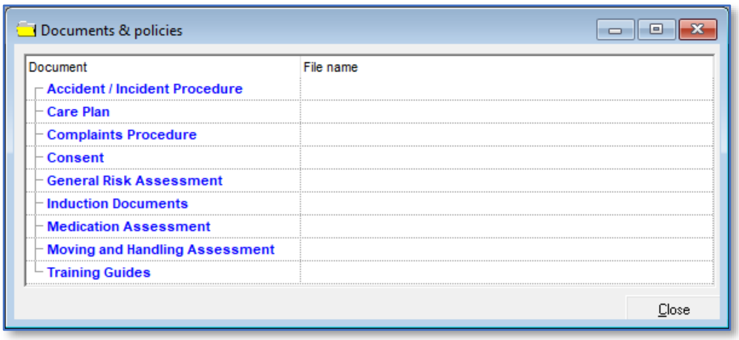
1. Open the **Items** screen
2. Go to the **Document types** list
3. Click **New** to add or edit to update the list of document types. Think what documents you would like to provide quick access to throughout the system. Press **Ok** to save any changes



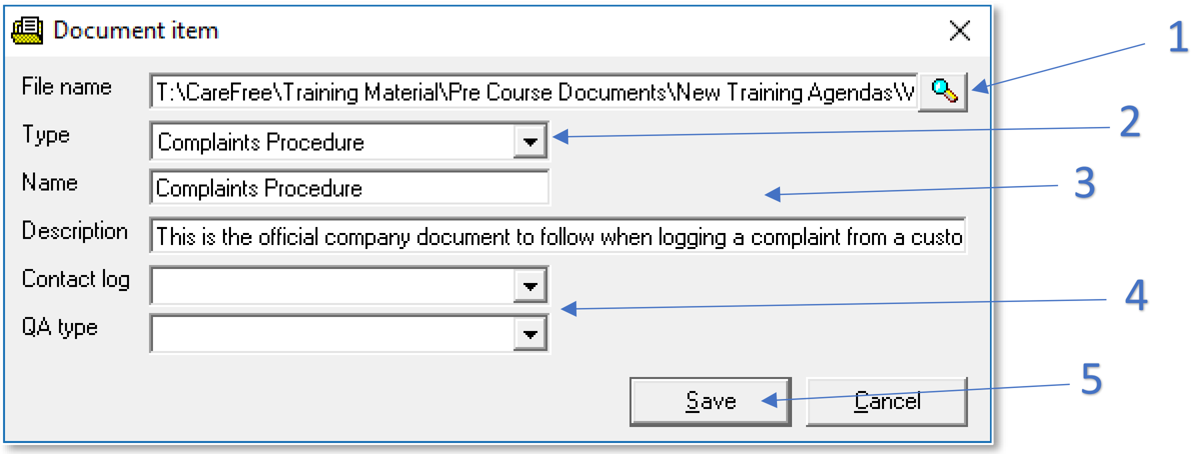
Configuring the Links

With the Document types created in the Items screen, it is possible to specify the way the links will work within CareFree. To do this:

1. Go to the **Personnel** menu and click **Documents & Policies**
2. You will be presented with a list of your document types



3. Right click on the screen and select **New** to begin creating your links using the document item window



1	Click on the magnifying glass to browse your computer network and find the document you wish to create a link to
2	Select the **Document Type**
3	Give the document an appropriate name and/or description
4	Select which area of CareFree this document will be linked to. Select either **QA** or the **Contact Log** drop down
5	Click **Save** to add to the document and create the link

By adding a document from a shared drive this will allow all other users/machines who have access to the shared drive to have access to this document. If the document is attached locally only that machine and user will be able to access the document

Workflow

Workflows in CareFree are fully customisable checklists which can be used to easily track processes with defined stages. The stages must be signed off or completed, for the overall process to reach a conclusion. Workflows are often created in CareFree for processes such as:

- Tracking the recruitment of Carers
- Tracking Client referrals
- Following a formal complaints procedure
- Carer inductions

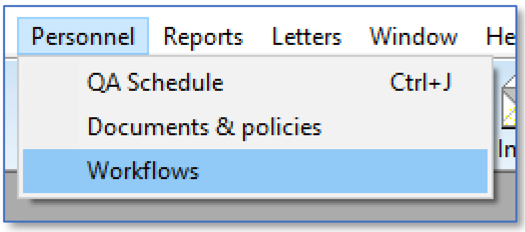
There are 3 steps involved in creating and using workflows:

- Creating a workflow
- Attaching the workflow to a Client or Carer
- Tracking workflow progress

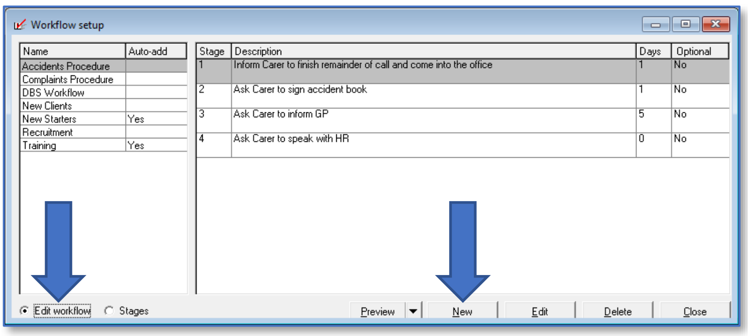
Creating a Workflow

To create a workflow, you will need to give it a name and specify the stages which will make up the process as a whole:

1. Go to the **Personnel** menu and select **Workflows**



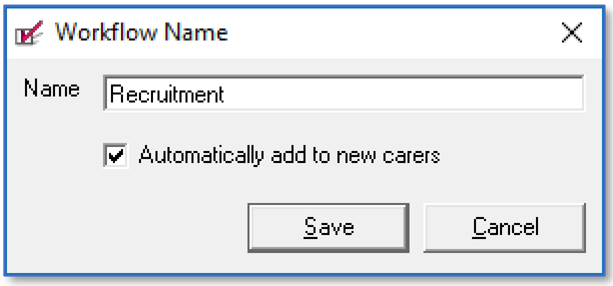
2. Ensure the **Edit Workflow** radio button is selected and click **New**



3. Give the workflow an appropriate name

4. Tick **Automatically add to new Carers** for the workflow to attach to new Carer records automatically

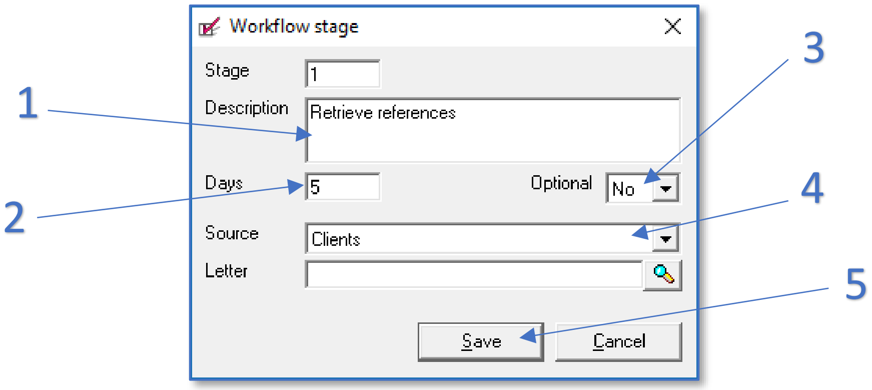
5. Click **Save**



6. The radio button will move from **Edit Workflow** to **Stages** as soon as the new workflow is created

7. Click **New** to add the first stage to the workflow

8. Complete the details for the workflow stage

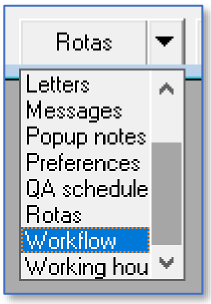


1	Give the stage an appropriate **Description**
2	Specify the number of **Days** the stage should be completed in from the start date of the workflow before it is classified as overdue
3	If the stage isn't a mandatory part of the overall workflow choose **Yes** in the **Optional** drop-down menu
4	Users can send mail merge letters to recipients as each stage of a workflow is completed. To set up mail merge, choose the contact type you would like to send the letter to in the **Source** drop-down box and select the letter template in the **Letter** drop-down box
5	Click **Save**

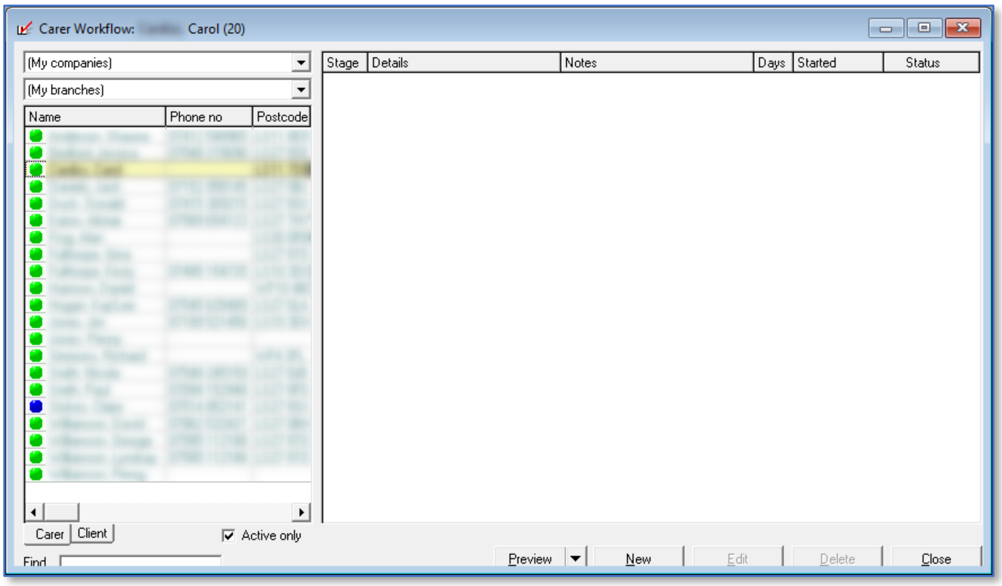
9. Repeat this process for all stages of the workflow until completed

Change the stage number when adding a new stage to re-order stages if a stage has been missed

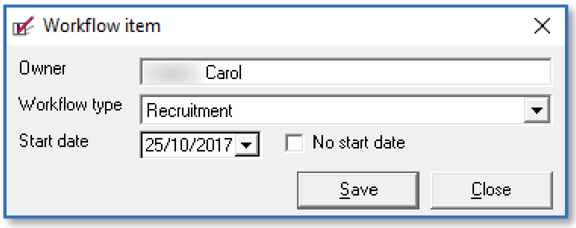
Attaching Workflows to a Client or Carer



1. Open the **Clients** or **Carers** screen
2. Go to **Workflow** in the **Rotas** Drop Down Menu
3. Use the lists on the left-hand side of the screen to go to the Client or Carer you wish to attach the workflow to



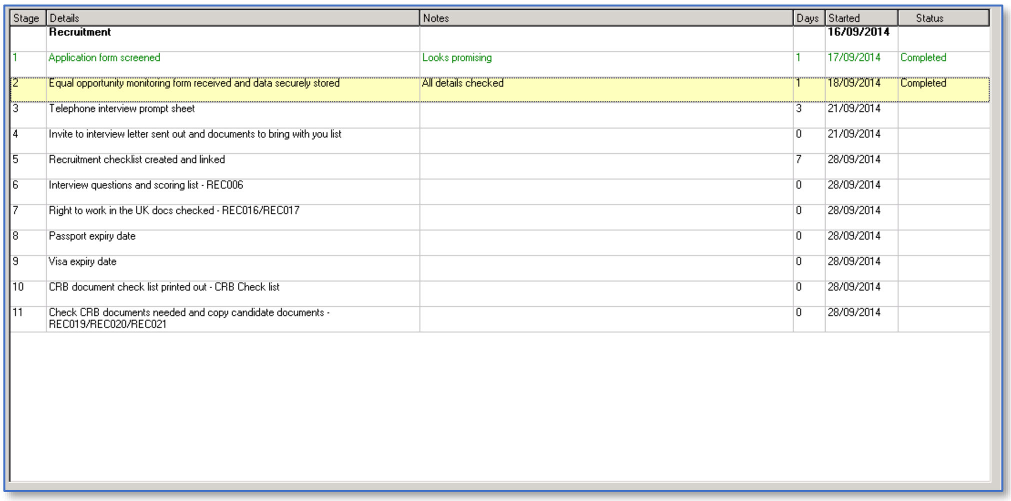
4. Click **New**
5. Use the drop-down box **Workflow type** to choose the workflow you want to attach the Carer/Client



6. Select the **Start Date** for the workflow, if there is no start date tick **No Start Date**
7. Click **Save** to attach the workflow to the Carer/Client

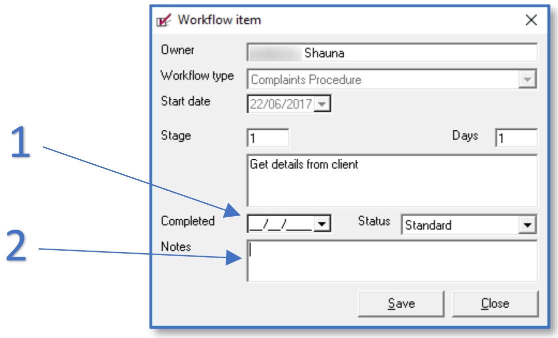
Tracking Workflow Progress

Once a workflow has been attached to a Carer or Client, it will be visible within the workflow screen.



It is possible to complete stages within the workflow and track progress using the workflow screen.

1. Open the **Clients** or **Carers** screen
2. Navigate to workflow in the **Rotas** drop down menu
3. Locate the Client or Carer who is engaged in the workflow
4. **Double click** on the stage of the workflow you wish to complete

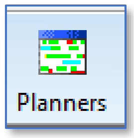


1	Enter the date the stage was completed
2	Add any notes then click **Save**

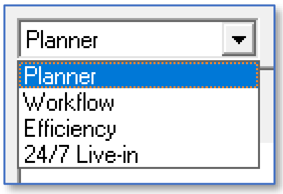
A more user-friendly way of tracking Workflow progress is available within the Planner screen in CareFree and this will be explained on page 49 of this training guide.

Planners Screen

The Planners screen in CareFree provides an overview of current business activity and enables users to identify peaks and troughs in resource allocation. There are four different planners within CareFree and we will look at each in turn.

1. To open the Planners screen, click on the **Planners** icon 

2. To select a planner to view, use the **drop-down** menu in the top left corner of the screen



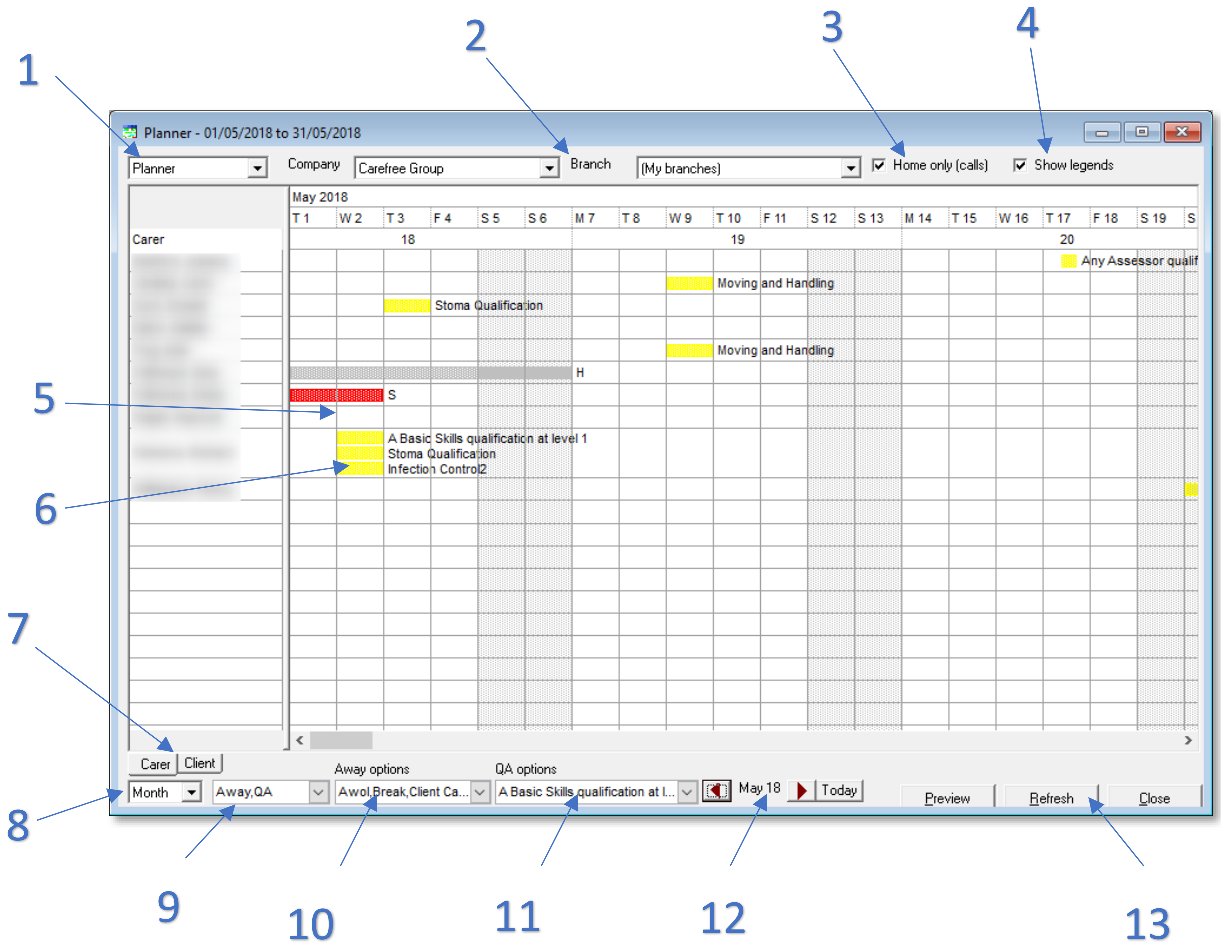
How the Planner Can Be Used

There are a variety of ways the Planner can be useful to co-ordinators. A number of examples are listed below:

- Overlay the calls and working hours Planners to identify appropriate gaps in Carer working patterns when trying to accommodate/allocate new Clients/care packages
- Use the QA Planner to keep a track of planned training and assessments on a weekly/monthly basis
- Overlay QA and call planners to ensure there are no conflicts
- Use the away planner and filter by away reason to view Carer sickness patterns or view holidays booked

Planner

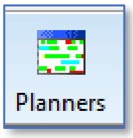
The main CareFree Planner provides a calendar style overview of activities relating to both Clients and Carers. Data can be filtered according to a variety of criteria.



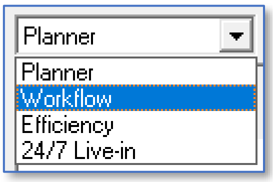
1	Select the **Planner** view in the drop-down
2	Filter data by company and branch
3	Select to view the data from the home branch only
4	Show legends displays a description against data on the Planner
5	Planner data is displayed here
6	A single click on any of the planner blocks will reveal further detail. Double clicking on away periods, QA schedules, and calls will open full detail windows
7	Select to display data for Client or Carers
8	Use the drop-down menu to select the time period you wish to view data for
9	Use the second drop-down menu to choose the data to display in the Planner (QA, calls, away periods, working hours)
10	If an away period is selected use the **Away Options** drop-down menu to select which away periods you wish to view
11	If a QA is selected use the **QA Options** drop-down menu to select which QA's you wish you view
12	Select the date you wish to view data for
13	Click **Refresh** to update the Planner screen after changing options

Workflow Planner

As mentioned in the previous section on workflow, the workflow Planner presents a more user-friendly way of tracking workflow progress in CareFree.

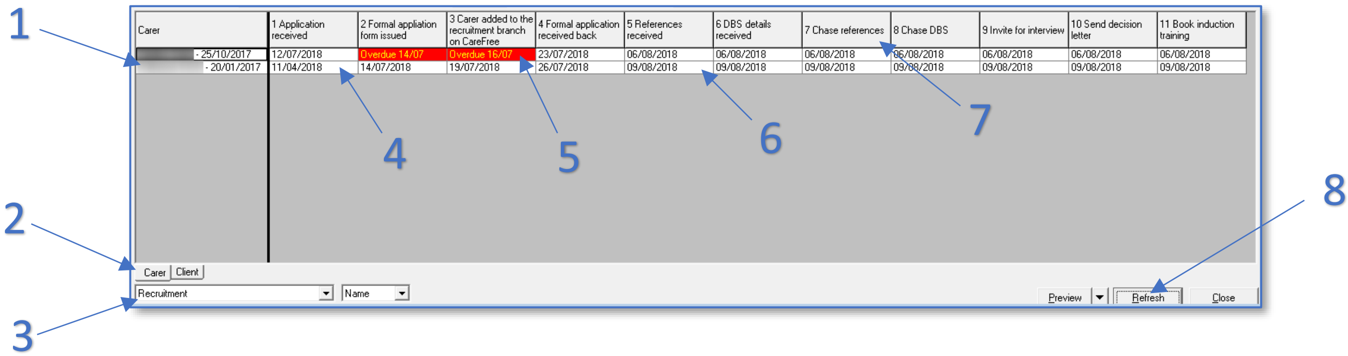
1. Click on the **Planners** icon 

2. Select **Workflow** using the drop-down menu in the top left corner of the screen



3. Use the Workflow Planner to complete stages within a workflow for Carers and Clients

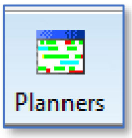
4. **Double click** on the stage you wish to complete and enter a completion date



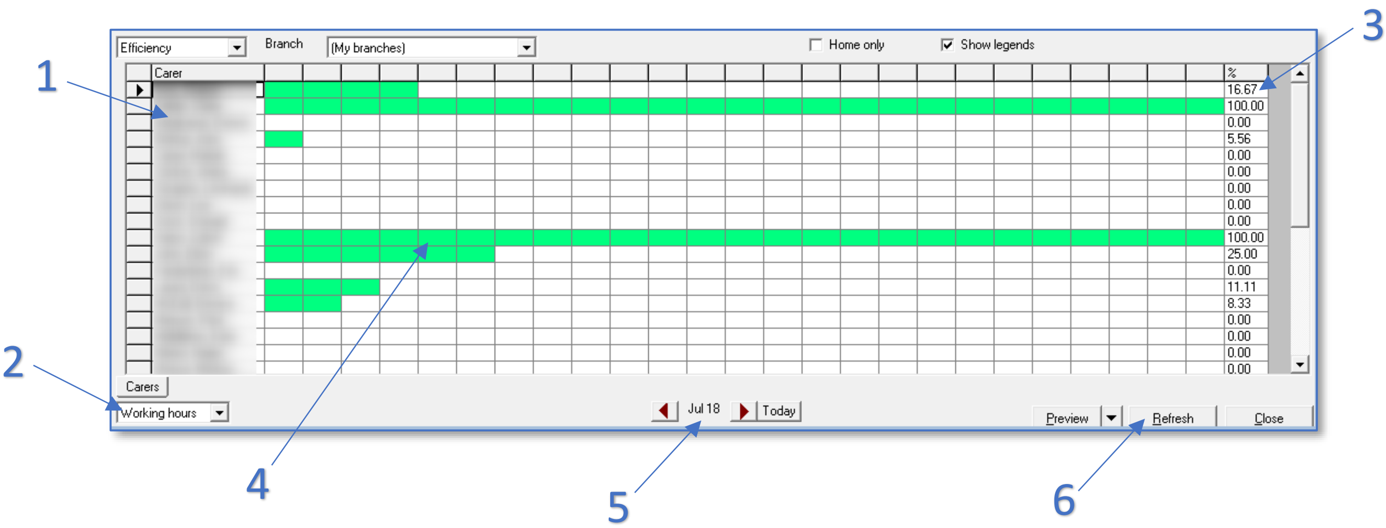
1	List of Clients or Carers who are engaged in the workflow
2	Choose to view workflows for Clients or Carers
3	Select the workflow type you wish to view data for
4	White indicates a stage is complete or it hasn't reached its due date
5	Red indicates a stage is overdue
6	Double-click on a stage to enter a completion date
7	Workflow stages are listed across the top of the screen
8	Use the **Refresh** button to refresh data on the screen

Efficiency Planner

The efficiency planner shows the percentage of hours a Carer has been allocated compared to their available hours.

1. Click on the **Planners** icon 

2. Select **Efficiency** using the drop-down menu in the top left corner of the screen



1	Carers are displayed to the left of the screen
2	Use the drop-down menu to choose either **Working Hours** or **Start-Finish**. The Working Hours option will look at the Carers efficiency based on what working hours have been entered against what calls have been allocated to the Carer. The Start-Finish option will look at the Carers efficiency based on their shift (the allocations of calls between their first call and their last call)
3	The percentage of efficiency is displayed at the end of each Carers row here
4	A green bar will indicate the Carers efficiency visually
5	Select the date you wish to view data for
6	Click **Refresh** to update the Planner screen

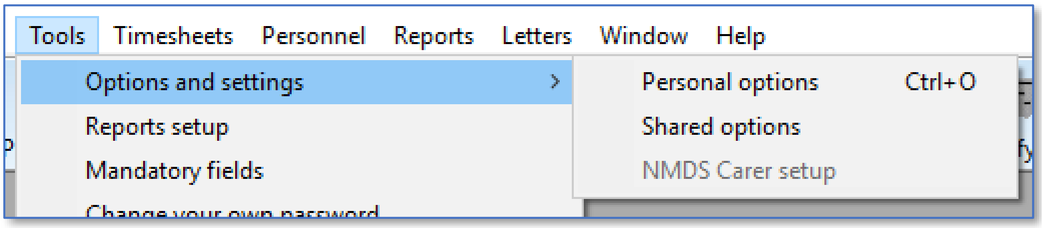
Preferences and Options

It is possible to change both personal user options and shared system options within CareFree.

- Settings changed can be reversed
- Be aware whether the change you are making affects you, or all users of the system

Accessing Options & Settings

1. Open the **Tools** menu
2. Go to **Options & Settings**
3. Select the required option from **Personal Options** or **Shared Options**



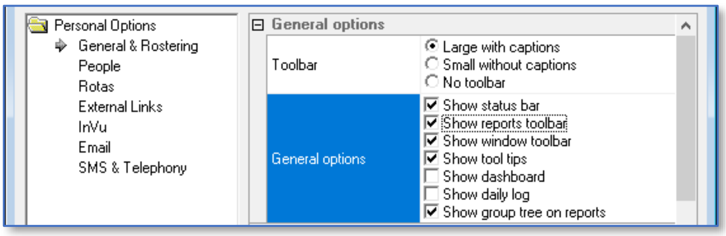
Commonly Used Options & Settings

Below is a list of the most commonly amended settings within the system.

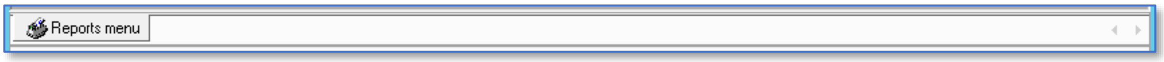
Reports Toolbar

This option allows you to store your most commonly used reports at the bottom of every screen for ease of access. To use the reports toolbar, it must first be activated. To activate the toolbar.

1. Open the **Tools** menu
2. Go to **Options & Settings**
3. Select **Personal Options**
4. Place a tick in the box next to **Show reports toolbar** which can be found under **General Options**
5. Click **Apply** to save changes



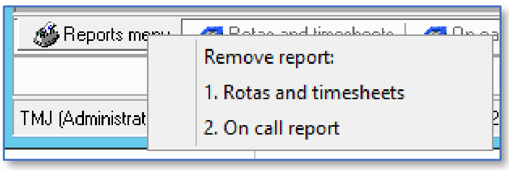
6. Once activated you will see the report toolbar displayed at the bottom of your screen



<u>Create a Link to a Frequently Used Report</u>

1. Open the **Reports** screen
2. Select the appropriate report group in the box at the top left of the screen
3. Click and drag the name of the report down onto the report toolbar

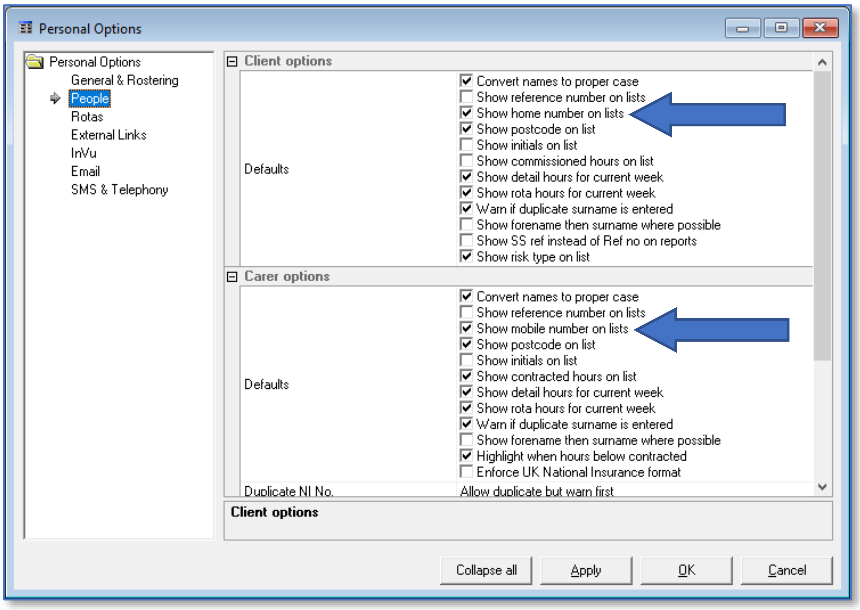
4. To remove the report right-click Report Menu and remove the report in question



Showing Mobile Numbers on Lists

This option will show your Carer mobile numbers on the list of Carers in CareFree and on the Rota.

1. Open the **Tools** menu
2. Go to **Options & Settings**
3. Select **Personal Options**
4. Select **People** in the list on the left-hand side of the screen

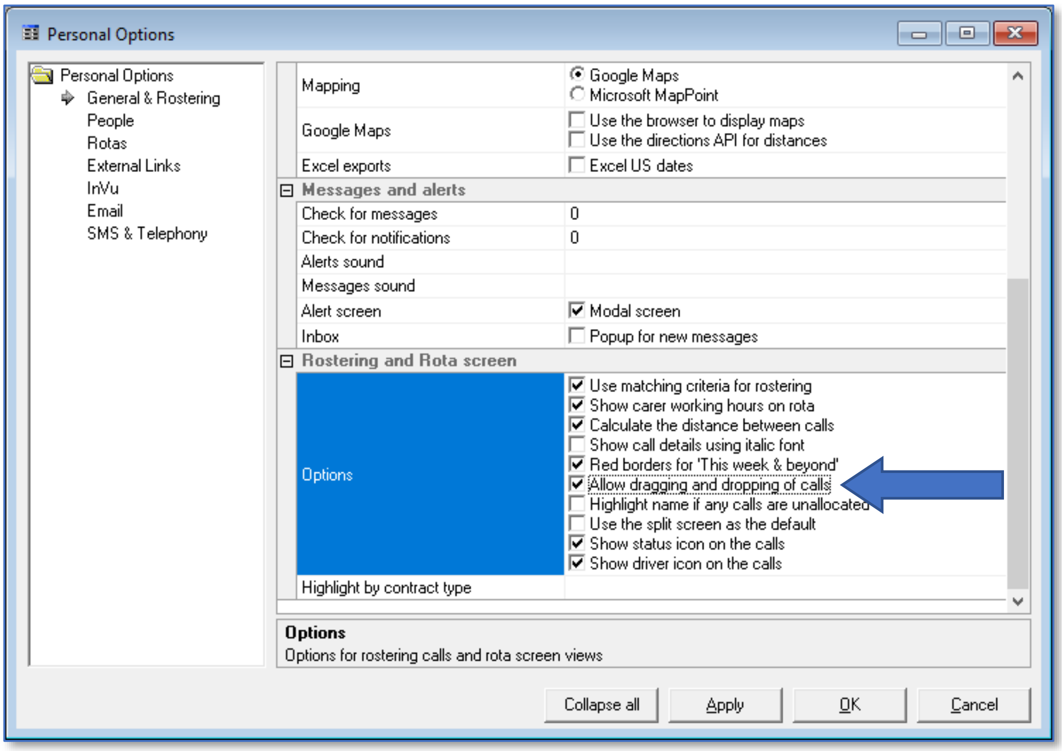


5. Place a tick in the box next to **Show mobile number on lists** which can be found in **Carer Options**
6. Click **Apply** to save the changes
7. There is also an option to **Show home number on lists** in the **Client Options** on this screen

Allow Dragging and Dropping of Calls

This option allows users to turn on and off the drag and drop function when working in the Rota screen. Whilst drag and drop can be useful, some organisations prefer to limit access to the functionality to reduce the chance of errors occurring.

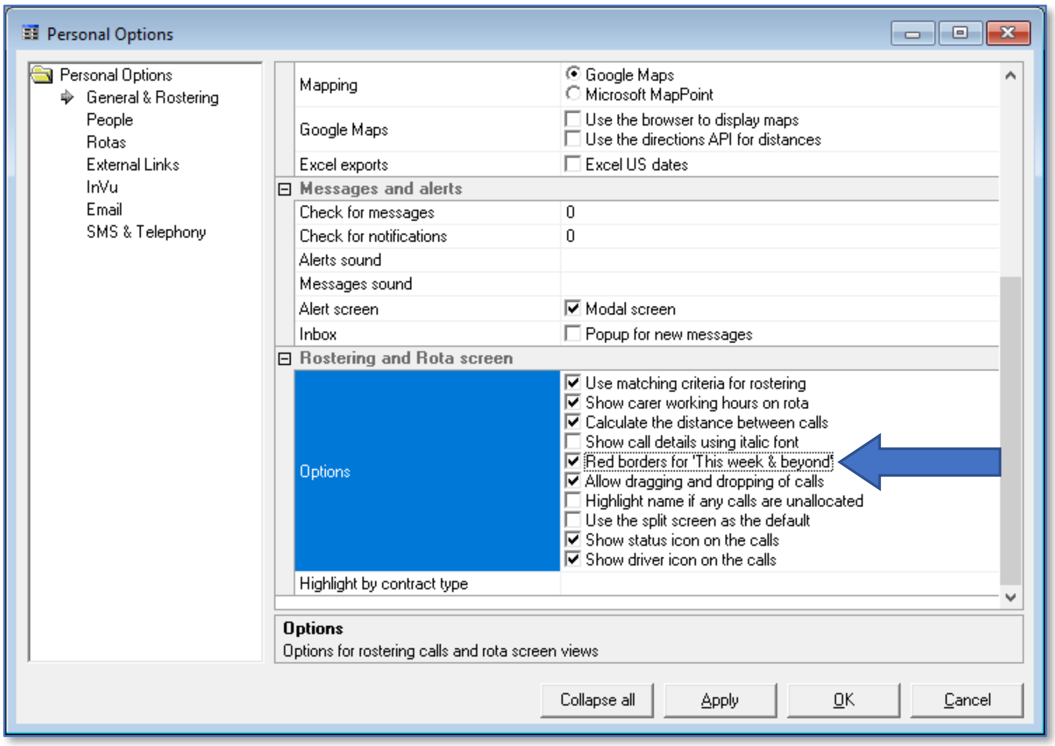
1. Open the **Tools** menu
2. Navigate to **Options & Settings**
3. Select **Personal Options**
4. Select **General & Rostering** in the list on the left-hand side of the screen
5. Scroll down to the options for the **Rostering and Rota Screen**
6. Either tick or untick the option to **Allow dragging and dropping of calls**
7. Click **Apply** to save the changes



Red Borders for This Week and Beyond

This option helps to highlight when users are making changes which affect the whole care package by selecting **This Week & Beyond** in the Rota screen.

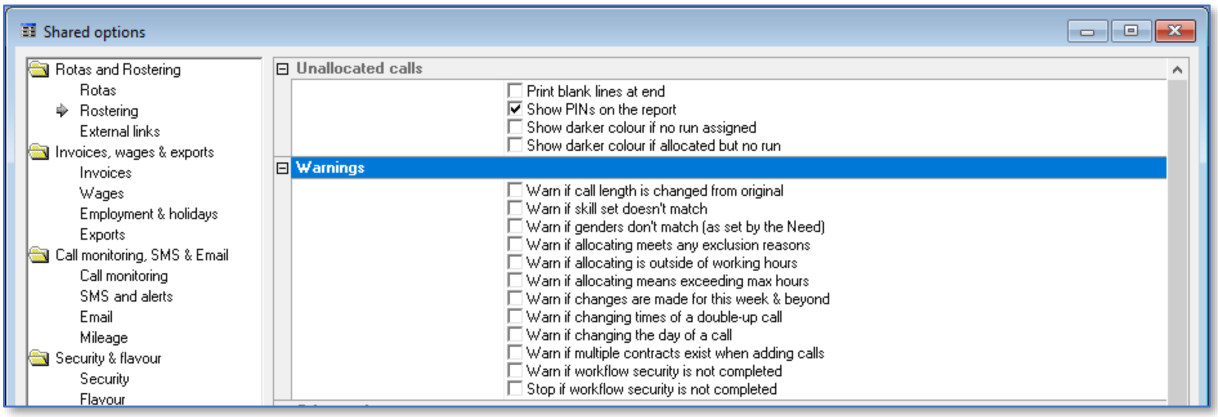
1. Open the **Tools** menu
2. Navigate to **Options & Settings**
3. Select **Personal Options**
4. Select **General & Rostering** in the list on the left-hand side of the screen
5. Scroll down to the options for the **Rostering and Rota Screen**
6. Either tick or untick the option to **Red borders for this week & beyond**
7. Click **Apply** to save the changes



Rostering Warnings

There are numerous warnings which can be triggered in CareFree to warn users where allocating a Call to a particular Carer, which may result in a conflict, or would contravene preferences which had been set for the Client/Carer. To access and change these Rostering Warnings:

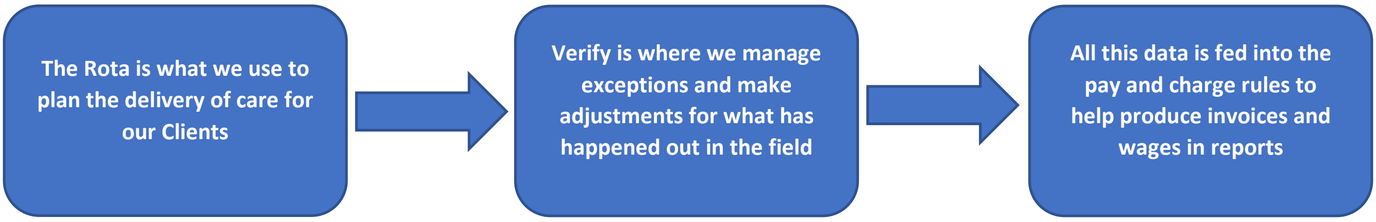
1. Open the **Tools** menu
2. Navigate to **Options & Settings**
3. Select **Shared Options**
4. Select **Rostering** in the list on the left-hand side of the screen
5. Select which warnings you would like to activate in the **Warnings** box
6. Click **Apply** to save the changes



Please note that these are global (shared) settings so any changes you make will affect other CareFree users in your organisation

Verification

Using CareFree to help manage the delivery of care to your Clients should follow a step by step process from using the Rota to planning your care calls, through to invoicing your Clients and paying your Carers. The verify screen fits in between these two processes and provides a simple interface for managing what is actually happening out in the field as your Carers visit your Clients.



Using the Verify Screen

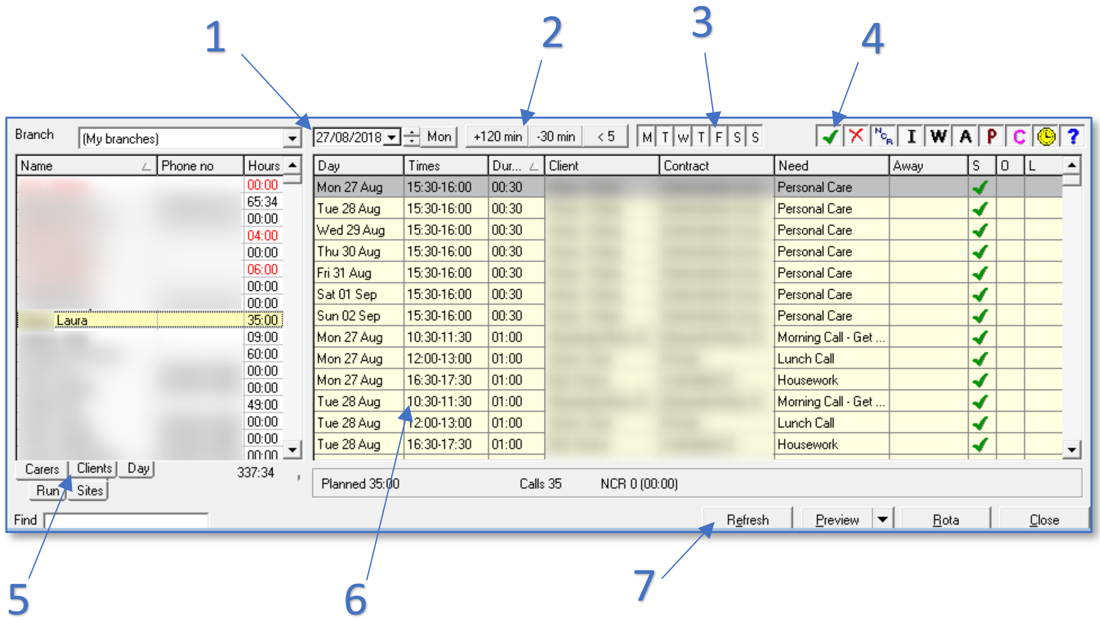
The Verify screen is used to manage any situation where what was planned on the Rota is not what was actually delivered by the Carer out in the field.

Variations from what was originally planned through to what was actually delivered can occur for a variety of reasons and it is important to ensure that the Verify screen is used to ensure that the correct data is fed through into the pay and charge rules to generate accurate invoices and wages.

The way in which the verify screen works varies depending upon whether your organisation is using Electronic Call Monitoring (ECM) or if you manually monitor care delivery.

To view the Verification screen. Press 

from the top of the screen in CareFree.



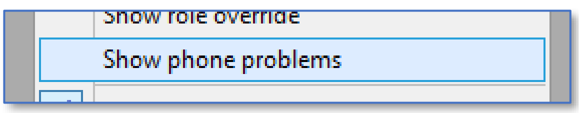
1	Use the date control to navigate to the week of the calls you wish to verify
2	Use filter buttons to include/exclude call where planned & actual times exceeded specific parameters
3	Use the filter buttons to either include or exclude data for specific days of the week
4	Use the filter buttons to include/exclude calls with specific call statuses
5	Users can choose to view verify data by Carer, Client or for individual days of the week
6	Double-click on an individual call to view more detailed information
7	Click **Refresh** to update the screen when parameters have been changed

It is possible to view more than two weeks ahead in the Verify screen. A column is also available to view the screen which shows Clients Phone Problems.

To view this column:

- Click on the **Verify** icon to open the Verify screen

- **Right-click** in the verify screen
- Select **Show Phone Problems**



Call Status

The status of a call in the Verify screen will determine what information is fed into Invoicing and Wages. A brief description of each call status is provided below:

Call Completed

- 
- The call has been completed as planned on the Rota
- For organisations who don't use ECM, we recommend setting the default status of all calls to Completed when creating Contracts
- For organisation who use ECM, the status of a call will change to completed if a Carer logs in and out at the call within set tolerances of the planned start and end time
- Completed calls will be picked up for both Invoicing and Wages

Missed Call

- 
- The call has not taken place as planned on the Rota
- For organisations who don't use ECM, a coordinator may need to go into Verify and apply Missed as an override status to a call if a Carer failed to complete a call
- For organisations who use ECM, a call will register as Missed in the Verify screen if a Carer does not log into a call within a set tolerance period on the planned start time on the Rota
    - Alerts can be triggered for coordinators in CareFree when calls are missed
    - If a Carer has simply forgotten to log in/out at a call, a coordinator can apply an override status of Completed

No Call Required

- NCR
- The call has been cancelled on the Rota and a Carer is no longer required to attend
- The call will have been cancelled by a coordinator adding an Away Period to the Clients Rota
    - Adding Away Periods to specific calls, or adding Away Blocks between dates will result in calls appearing with the status NCR in Verify
- NCR calls will not be picked up for Invoicing & Wages
    - It is necessary to apply an override status to an NCR call if a Client has cancelled their call without providing sufficient notice and you wish to charge them for the call, and/or pay the Carer

Invoice Only

- I
- Calls marked as Invoice Only will not be picked up in Carer Wages runs, but will appear in Invoicing for Clients

Wages Only

- W
- Calls marked as Wages Only will not be picked up in Client Invoice runs, but will appear in Wages for Carers

Aborted, Penalty & Cancelled Calls

- A P C
- Aborted, Penalty and Cancelled are all call statuses which can be tailored by users to feed specific data into Invoicing and Wages. This will depend on the business rules, terms and conditions your organisation has adopted
- The method for changing the rules behind Aborted, Penalty and Cancelled Calls is covered in detail at the end of this section

Unexpected Call

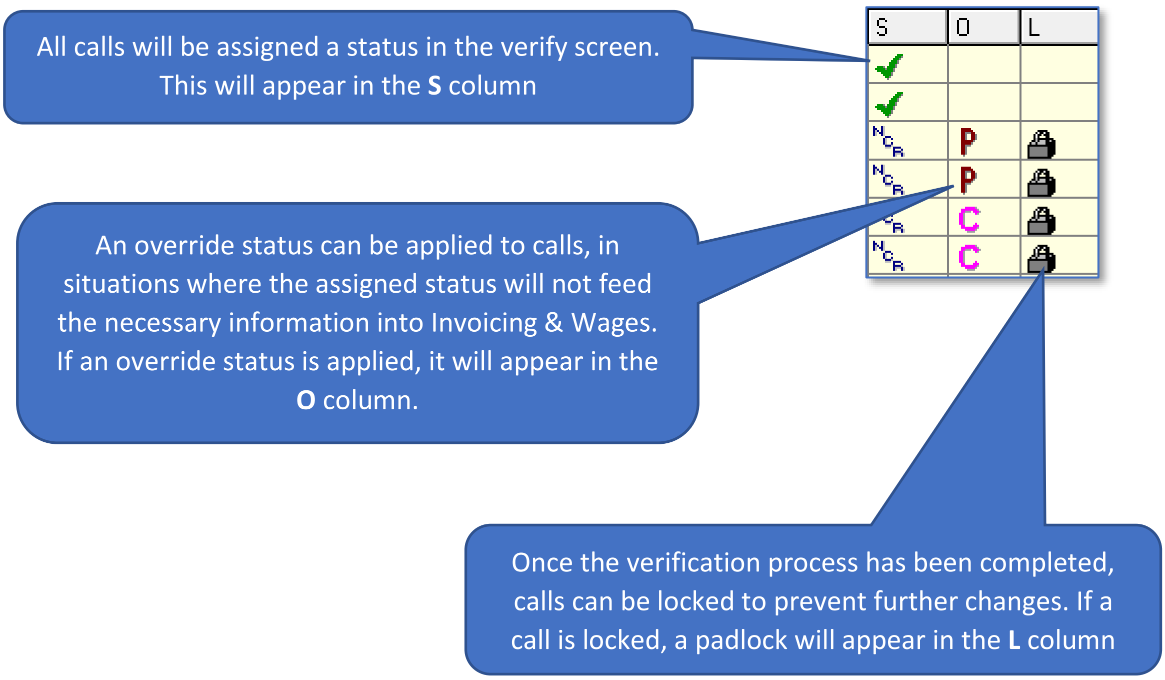
- 
- An Unexpected call will be generated in Verify when a call which has not been planned on the Rota occurs
- Unexpected calls are only generated when ECM is in use
- A common reason for an Unexpected call appearing is where Carers agree to swap calls without notifying the coordinator
    - In this situation, the original (planned) call will register as Missed in Verify and the call completed by the wrong Carer will appear with the status set to Unexpected
    - It is possible to match up and fix these calls in the Verify screen

Call Status & Override Status

All calls will be assigned a status in the Verify screen. For organisations with ECM, the default status of all calls should be call waiting until a call is either completed or missed by a Carer logging in and out within a specific time period. For organisations without ECM, the default status of calls is set when creating contracts (this is explained in our Day 1 Training guide).

It is possible to apply an override status to any call in the verify screen, when the assigned status is incorrect or will feed inaccurate information into Invoices and Wages. The most common reasons for applying an override status are:

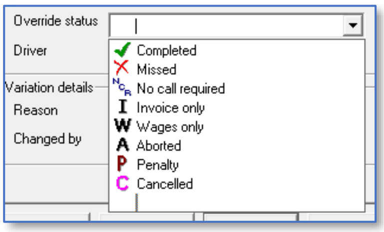
- Carers forgetting to log in/out of calls where ECM is used, resulting in completed calls registering as missed
- Calls which are cancelled by Clients which still require some level of charge/payment to be levied



Applying an Override Status to a Single Call

There are several methods which can be used to apply an override status to a call:

1. **Double-click** on the call in the Verify screen
2. Select the override status using the drop-down menu
3. Click **Save**

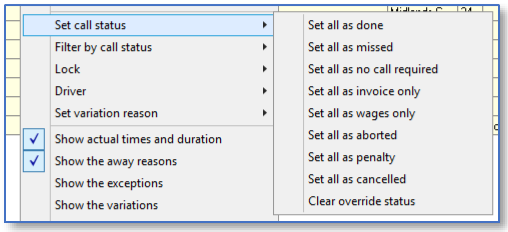


Or

Double-click in the override status column on the call to cycle through the override statuses until you reach the one you require

Or

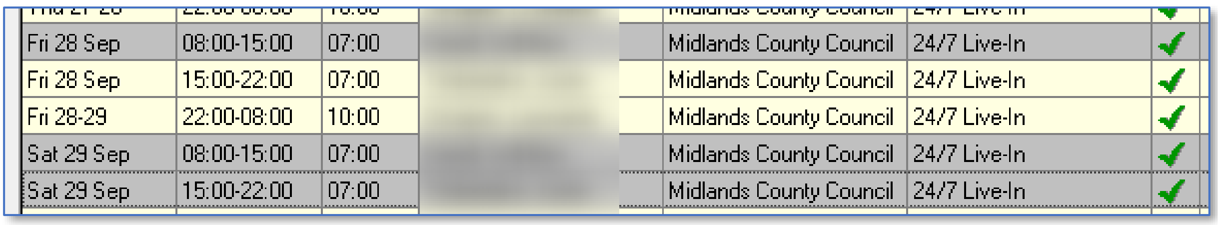
1. Select the call in the Verify screen
2. Right click and select **Set Call Status**
3. Select the override status required in the sub-menu



Applying an Override Status to Multiple Calls

It is possible to quickly apply the same override status to a batch of calls:

1. Select the first call and hold down the CTRL key on the keyboard
2. Select the other calls by left clicking on them. The selected calls will turn grey

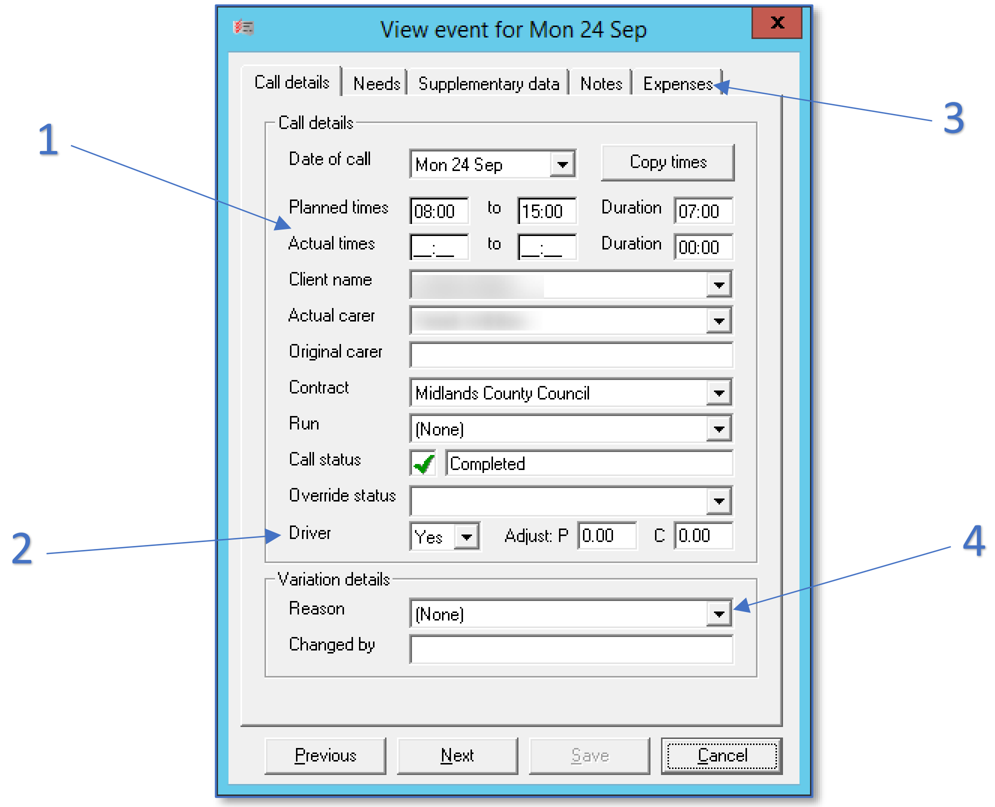


Fri 28 Sep	08:00-15:00	07:00		Midlands County Council	24/7 Live-In
Fri 28 Sep	15:00-22:00	07:00		Midlands County Council	24/7 Live-In
Fri 28-29	22:00-08:00	10:00		Midlands County Council	24/7 Live-In
Sat 29 Sep	08:00-15:00	07:00		Midlands County Council	24/7 Live-In
Sat 29 Sep	15:00-22:00	07:00		Midlands County Council	24/7 Live-In

3. Right-click and select **Set Call Status**
4. Choose the override status required in the sub-menu

Changing Call Details Using Verify

A range of information relating to a call can be changed from within the Verify screen:

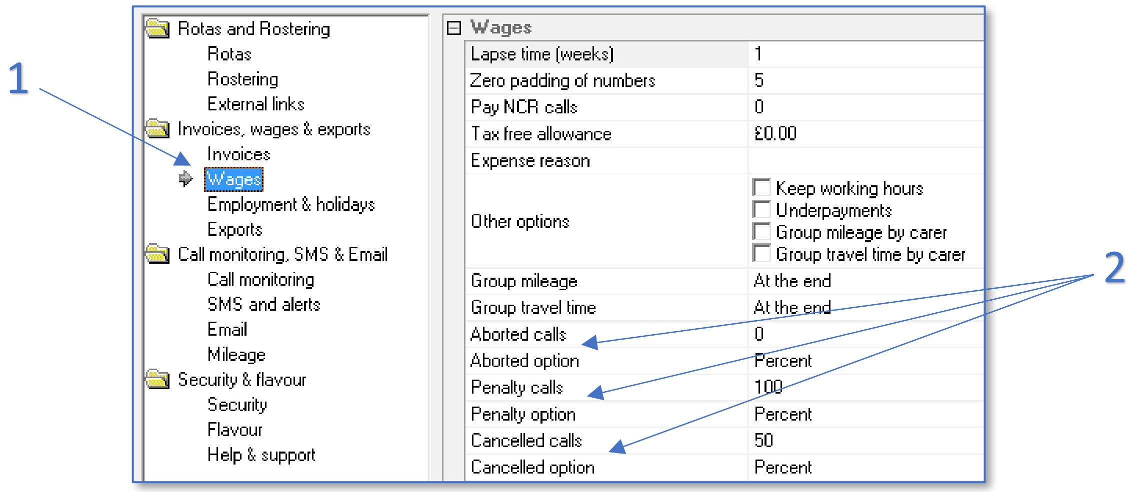


1	**Actual Times** will automatically be populated when the Carer logs in and out of the call if the organisation use ECM. These times can be completed/edited by a coordinator if required
2	Change the **Drive** status of the Carer here for mileage payments
3	**Needs** and **Expenses** can be edited/added to call from within the Verify screen if required
4	A **Variation Reason** can be added to explain why changes have been made to call details in the Verify screen. A variation reason list can be amended in the Items screen

Setting Options for Aborted, Penalty & Cancelled Calls

By default, Aborted, Penalty & Cancelled Calls will not be picked up in Invoicing and Wages. The statuses were created to give organisations sufficient flexibility to accommodate unique cancellation terms and business rules. To alter the rules for Aborted, Penalty & Cancelled Calls:

1. Open the **Tools** menu
2. Navigate to **Options & Settings** and select **Shared Options**
3. To set the rules governing Customer charges select **Invoices** in the list on the left
4. To set the rules governing Carer wages, select **Wages** in the list on the left



1	Select **Invoices** or **Wages** in the list on the left
2	Rules behind **Aborted**, **Penalty** and **Cancelled** calls can be specified here

Aborted, Penalty and Cancelled Call Setup Scenario

For demonstration purposes, our scenario presumes the following business rules exist:

- If a call is cancelled with less than 24 hours' notice, the Client will be charged and the Carer will be paid 100% of their costs /wages
- If a call is cancelled with less than 48 hours' notice, the Client will be charged and the Carer will be paid 50% of their costs/wages
- If a call is cancelled with more than 48 hours' notice, there will be no charges or payments to Clients/Carers

In this scenario, it is important to remember that regardless of how much notice is given, all cancelled calls will appear in Verify with the status NCR (No Call Required). This happens once the coordinator has cancelled them using an Away Period on the Client Rota. As NCR calls are not picked up for Invoicing and Wages, we will need to change the status of the calls where a Client gave less than 24 hours', or 48 hours' notice to ensure that the correct charge and pay information is fed through into Invoicing and Wages. To do this we would recommend the following:

1. Open the **Tools** menu
2. Go to **Options & Settings** and select **Shared Options**
3. Select **Invoices** in the list on the left
4. Change the **Penalty Calls** value to 100 and change the **Penalty Option** from **Minutes** to **Percent**
5. Change the **Cancelled Calls** value to 50 and change the **Penalty Option** from **Minutes** to **Percent**
6. Then select **Wages** in the list on the left and make the same changes

We can now use the call Override Status **Penalty** on any NCR calls in verify where a Client gave less than 24 hours' notice, and can use the **Cancelled** status where a Client gave less than 48 hours' notice.

Using Away Reasons to Cancel Calls

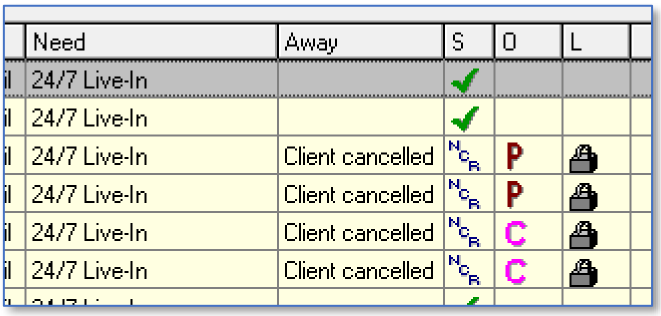
It often helps to pick up the cancelled calls which need an override status applying in the Verify screen if appropriate away reasons have been added in the Items screen. In our example scenario, a coordinator may wish to have 3 away reasons for when a Client cancels a call:

- Client Cancelled
- Client Cancelled 24hr
- Client Cancelled 48hr

To add or edit away reasons:

1. Open the **Items** screen
2. Go to the **Away Reasons** list in the box at the top left
3. Click **New** to add new items to the list

Away Reasons can be displayed in the verify screen to allow coordinators to quickly identify the calls which need an override status applying.



Using QA

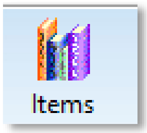
QA is used in CareFree to schedule events such as training courses, assessments, spot checks and meetings etc for both Clients and Carers. It is possible to display QA's which have been scheduled on a Client or Carers Rota and QA events can be configured so that they automatically re-schedule refresher events after the appropriate time period has elapsed.

Creating & Editing QA Types in the Items Screen

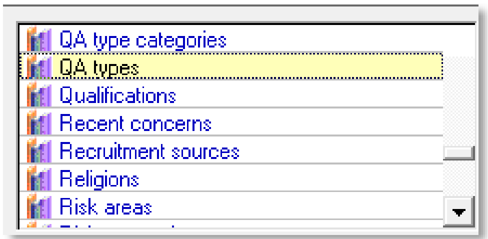
Before creating schedules for your Carers or Clients, we recommend spending some time updating the information relating to QA in the Items screen.

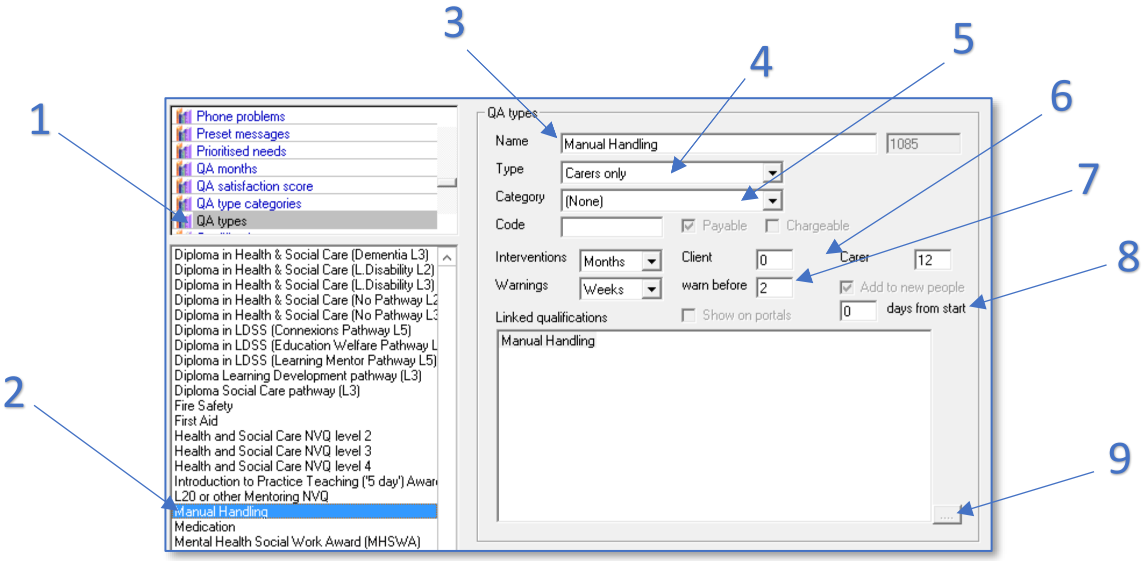
The QA types list contains all the training courses and assessment types you might wish to schedule for your Carers and Clients. You may wish to create QA Types to schedule regular checks of Carer driving licences/insurance details, or to plan regular staff meetings.

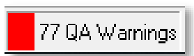
1. Open the **Items** screen



2. Go to **QA Types** in the box at the top left of the screen



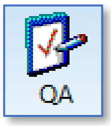


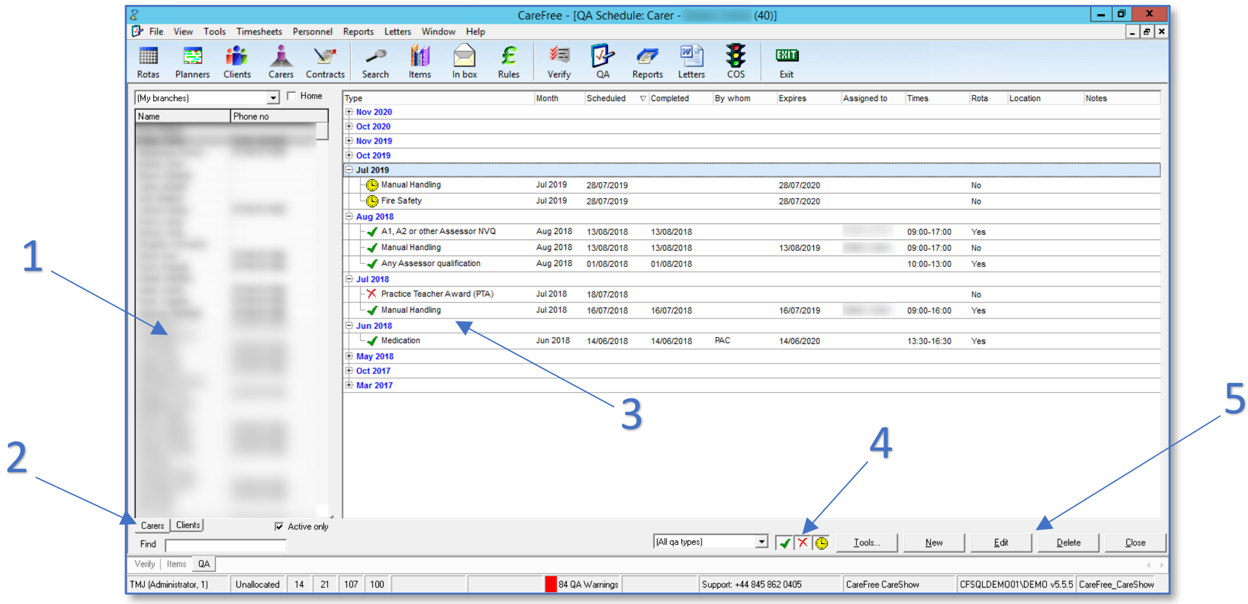
1	Select **QA Types** from the Items list
2	Select a QA type and click **Edit** to amend its properties. If the QA type that is required is not there click **New**
3	Choose an appropriate **Name** for the QA type
4	Can the QA type be scheduled for Carers or Clients or both groups?
5	**Category** and **Code** relate to NMDS data uploads
6	Specify how often the QA type needs to be scheduled for by entering a number in Clients or Carer. Then select weeks or months in the interventions drop down box
7	Specify how close to the schedule date you want a QA warning to appear. This warning appears at the bottom of the CareFree menu when the QA is due 
8	Tick **Add to new people** if this QA needs to be added to new Clients/Carers. Type in how many days after their start date that the QA would be need to be scheduled in for
9	Use this box to link the QA type to a qualification. The qualifications list can be configured in the Items list

Linking QA to Qualifications

It is possible to link QA Types with Qualifications. Once this link has been made, the Qualifications tab in the Carer screen will automatically be updated when QA schedules are completed for Carers. Before linking QA Types to Qualifications, you may wish to update the Qualifications list in the Items screen.

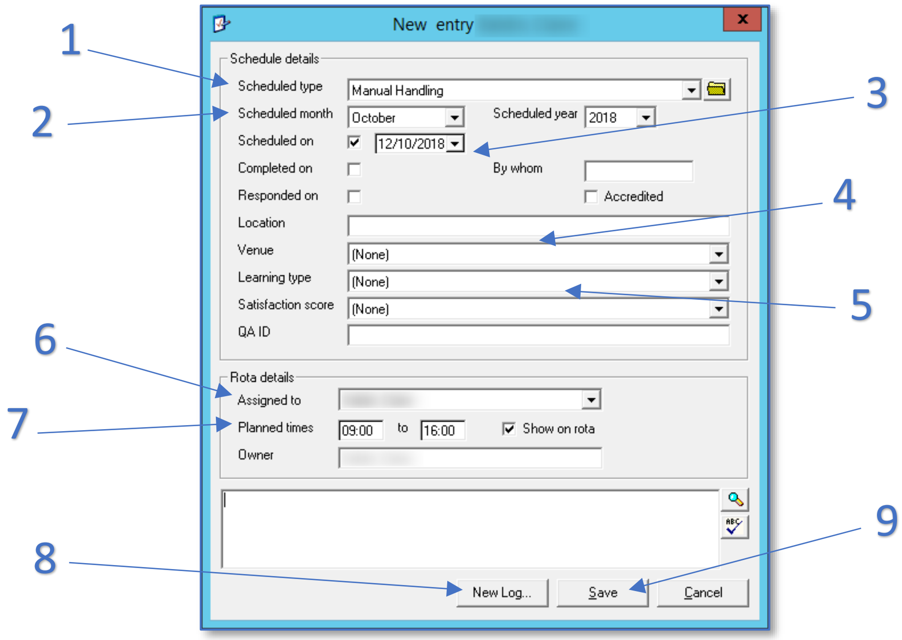
Scheduling QA for Carers & Clients

1. Open the **QA screen** by clicking on the QA icon 



1	Select an individual Carer or Client to display their QA schedule
2	Use the tabs to display QA for either Carers or Clients
3	Scheduled, completed and missed QA items for each Carer and Client are displayed here
4	Filter the list to display on specific QA types here. Use buttons to show/hide QA by status
5	Use the **New** button to create a new QA schedule. Use the **Edit** or double-click on a QA to amend an existing QA schedule

1. Click **New** to create a new QA schedule



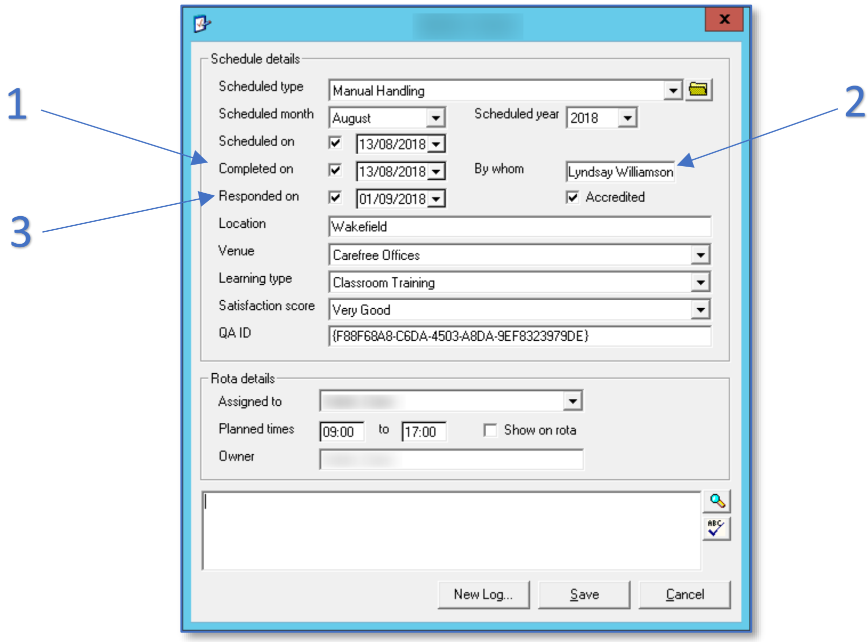
1	Select the QA type you wish to schedule
2	Select the month and year for the QA schedule
3	Place a tick next to **Scheduled On** to specify the date the QA will occur. If the exact date is not yet known the system will default to the 1st of the month
4	Use the **Location** field to manually input a location or pre-populate the **Venue** list in the items screen to pick frequently used venues and allow mileage calculations
5	Populate the items list for Learning Types (e.g. e-learning, classroom) and Satisfaction Scores (the score would be given by the attendee)
6	To assign another Carer as the trainer or assessor for the QA, pick their name in the drop-down list here. The QA will also then appear on their Rota
7	Add **Planned Times** and add a tick to **Show On Rota** to make the QA appear on the Rota (keep spot checks hidden!)
8	Click **New Log** to create a log against the QA
9	Click **Save** to schedule the QA item

Completing Scheduled QA Items

Once an assessment or training course has been completed, it is important to ensure that the QA schedule is updated.

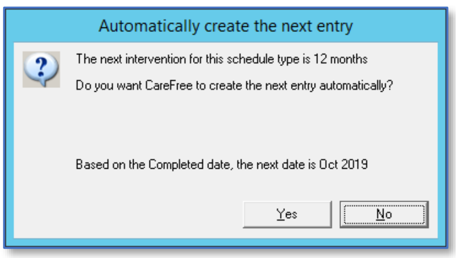
To complete a scheduled QA item:

1. Open the **QA Screen** by clicking on the QA icon
2. Go to the Carer or Client who has completed the QA
3. **Double-click** on the QA schedule that requires completion



1	Place a tick in **Completed On** and specify the date on which the QA was actually completed
2	Add the name of the person who is signing off the QA in **By Whom**
3	**Responded On** is a space to log an additional date if tracking is required i.e. sending certificates

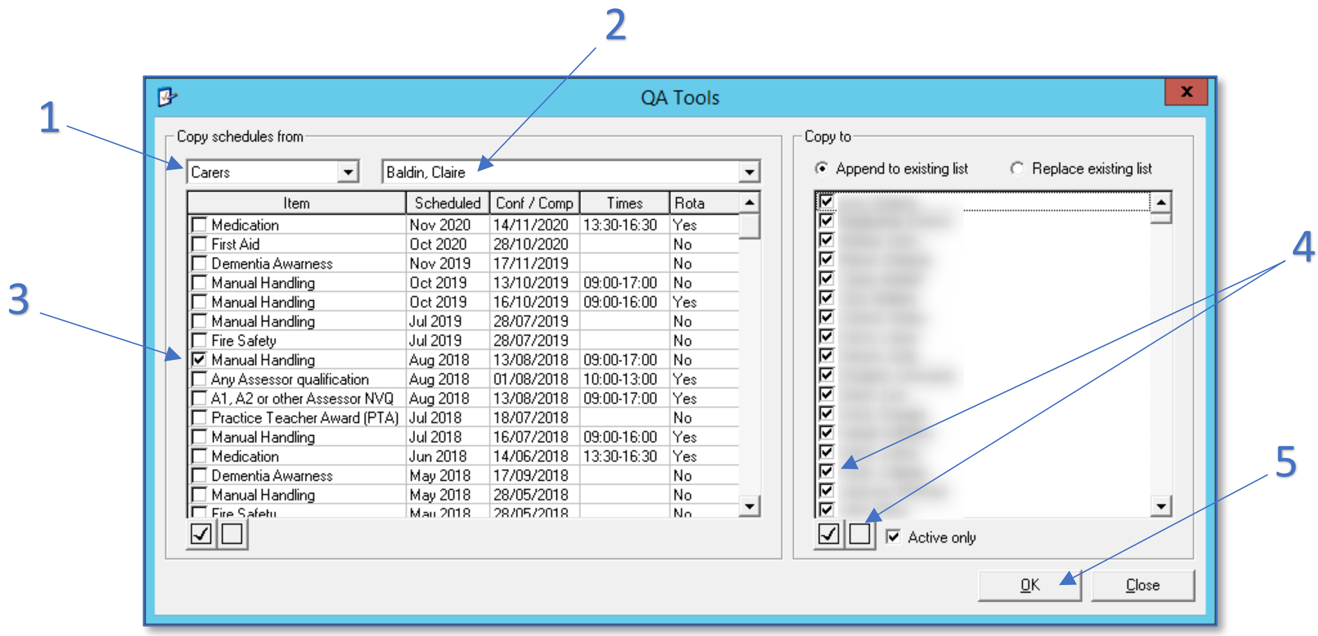
4. If you are completing a QA schedule which has been created with a specific intervention period in the Items screen, the following warning when will appearing when saving the QA
5. Click **Yes** if you would like CareFree to add a new schedule for when the QA is next due to be repeated

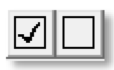


Copying QA Schedules to Multiple Carers

It is possible to copy the same QA schedule to multiple Carers. This is useful when arranging a training course or a meeting which several Carers will attend at the same time.

1. Open the **QA Screen**
2. Create the QA schedule for one Carer by following the steps listed on page 71
3. Click on the **Tools** button



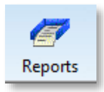
1	Choose to copy the schedules from either **Carers** or **Clients**
2	Use the drop-down menu to locate the Carer/Client for whom the QA was scheduled
3	Place a tick next to the QA schedule you wish to copy
4	Tick the Carers/Clients that require a copy of the QA schedule to. The two boxes at the bottom of this list are used to tick or untick all Carers/Clients 
5	Click **OK** to copy

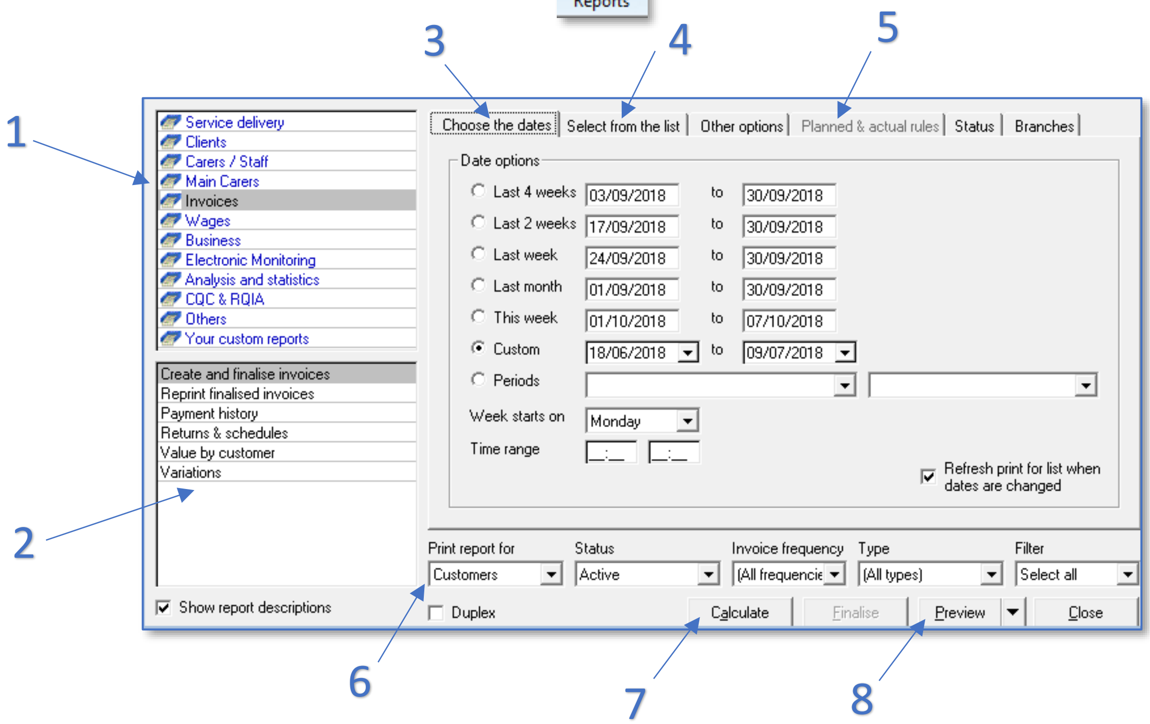
Reports

The Reports screen is where you would go in CareFree to get specific data out of the database.

The Reports Screen

The Reports screen always works in the same way, regardless of the type of Report you wish to output. Once you have mastered running an individual Report, you will be able to apply your knowledge to use all the Reports within the database. To open the Reports screen:

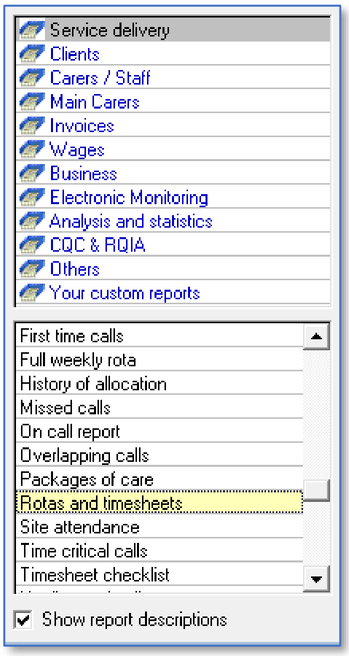
1. Click on the **Reports** icon 



1	Select which group of reports to view using this box
2	There will be multiple reports available within each group – choose the most appropriate report
3	Specify a date range using the **Choose the dates** tab (if applicable)
4	Select people or groups of people to include using the **Select from the list** tab
5	Use the other tabs to select options and specify parameters which can vary depending on which report is being ran
6	Use these drop-down boxes to specify further options, choose reports formats and place filters on data
7	Financial reports will need to be calculated before they can be previewed
8	Click **Preview** to view the report. Use the drop-down menu to see the Print/Email/Export options

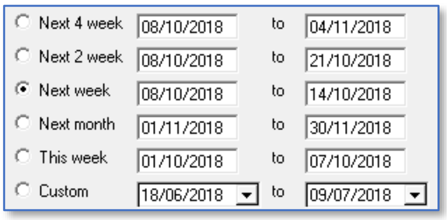
Using Reports to Generate Carer Rotas

One of the most common reasons to access the Reports screen is to output Carer Rotas. The Rotas can either be printed in hardcopy, or emailed directly to Carers if email addresses and email server details have been stored within CareFree.

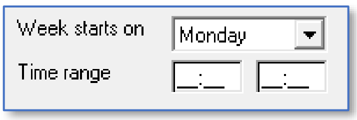


1. Open the **Reports** screen
2. Select the **Service Delivery** group of reports in the box at the top left
3. Select the Rotas and Timesheets report in the box below
4. Ensure the report is set to print for **Carers** with the status set to **Active** in the two drop down menus at the bottom of the report

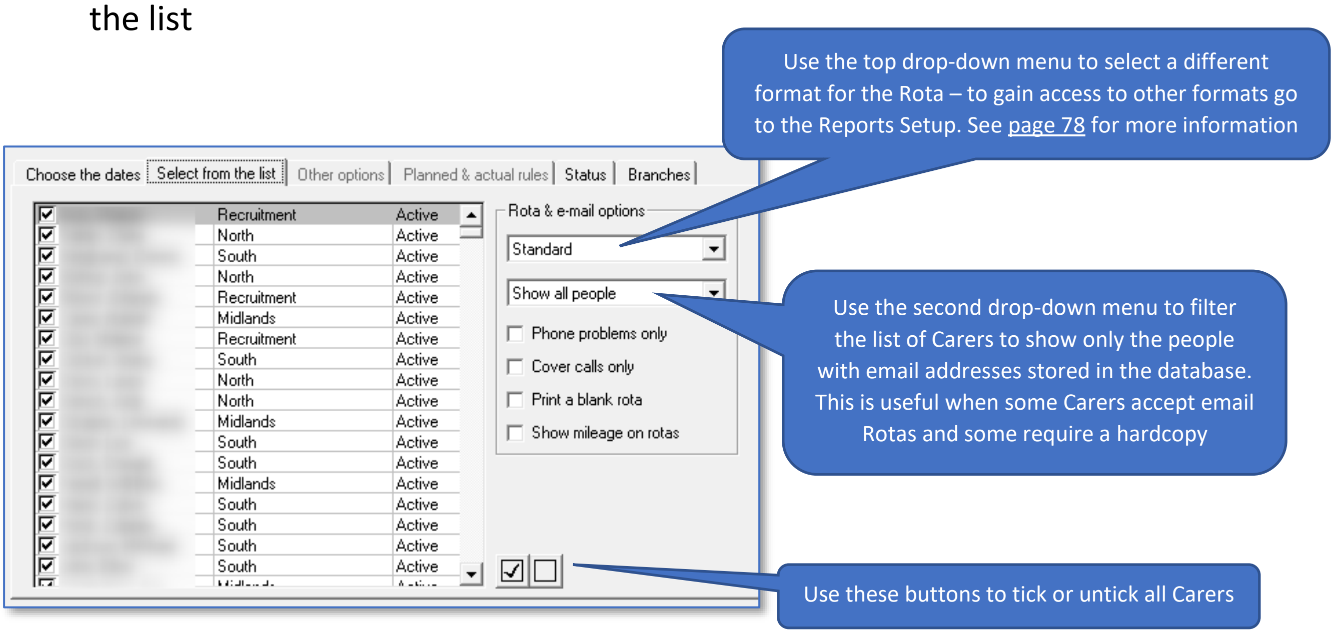
5. Use the **Choose the dates** tab to specify the date range for the Rota
   a. Use the pre-set date ranges or use the **Custom** option to specify the date range for complete flexibility



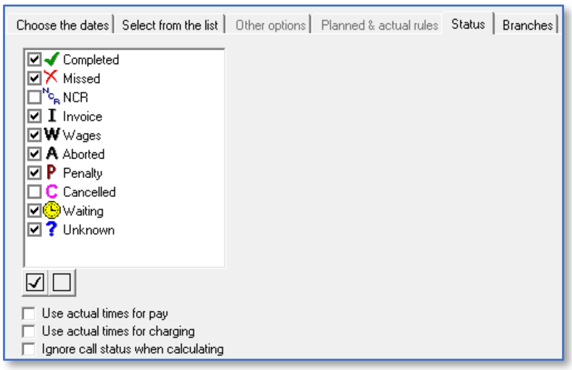
   b. Choose which day of the week your Rota starts on using the **Week starts on** drop down menu
   c. Use the **Time range** boxes to specify start and end times for the Rota period



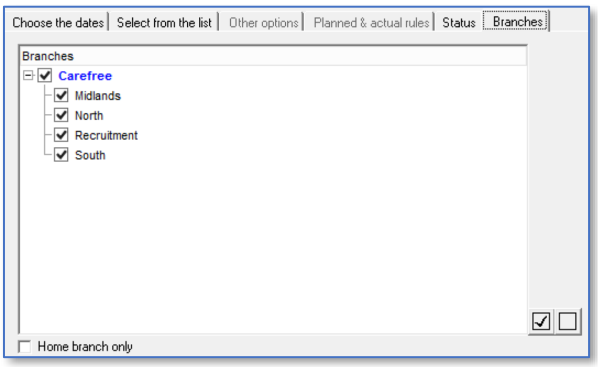
6. Use the **Select from List** tab to choose the Carers for whom you wish to output the Rota to
7. You can leave all Carers selected, de-select all or pick individuals from the list



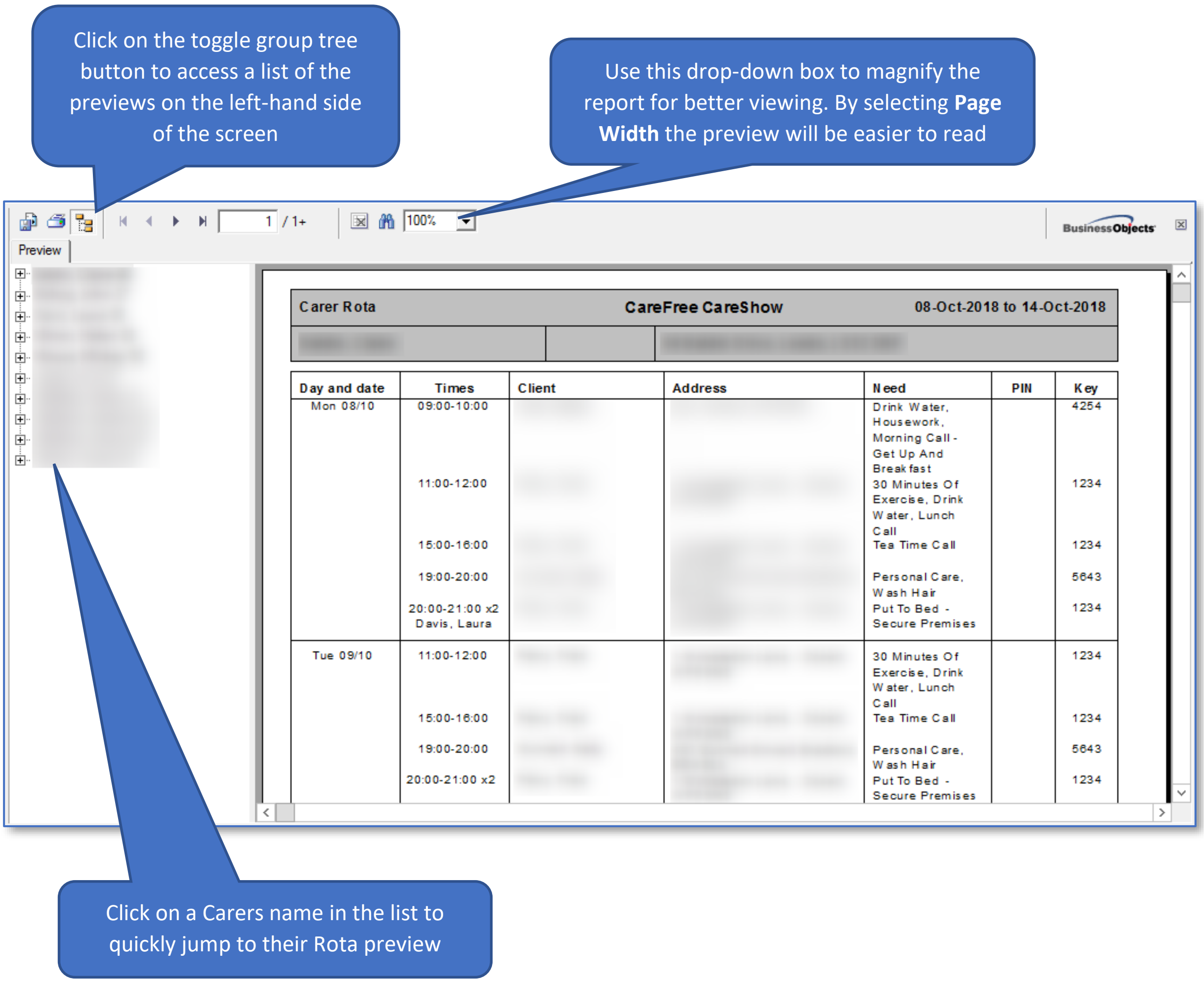
8. Use the **Status** tab to decide which call statuses to include on the Carers Rota
    a. This allows a decision to include NCR calls on a Rota – showing the Carer that a call has been cancelled



9. Use the **Branches** tab to include/exclude specific branches when outputting the data
    a. By de-selecting some branches, the list of Carers in the select from list tabs will be altered accordingly



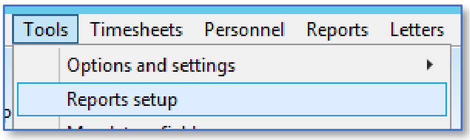
10. After the relevant selections have been made, click the **Preview** button to view the Rotas on screen
11. The report preview screen will open showing the Rota for the first Carer you selected in the list
12. Use the arrow buttons to click through the preview for your other Carers

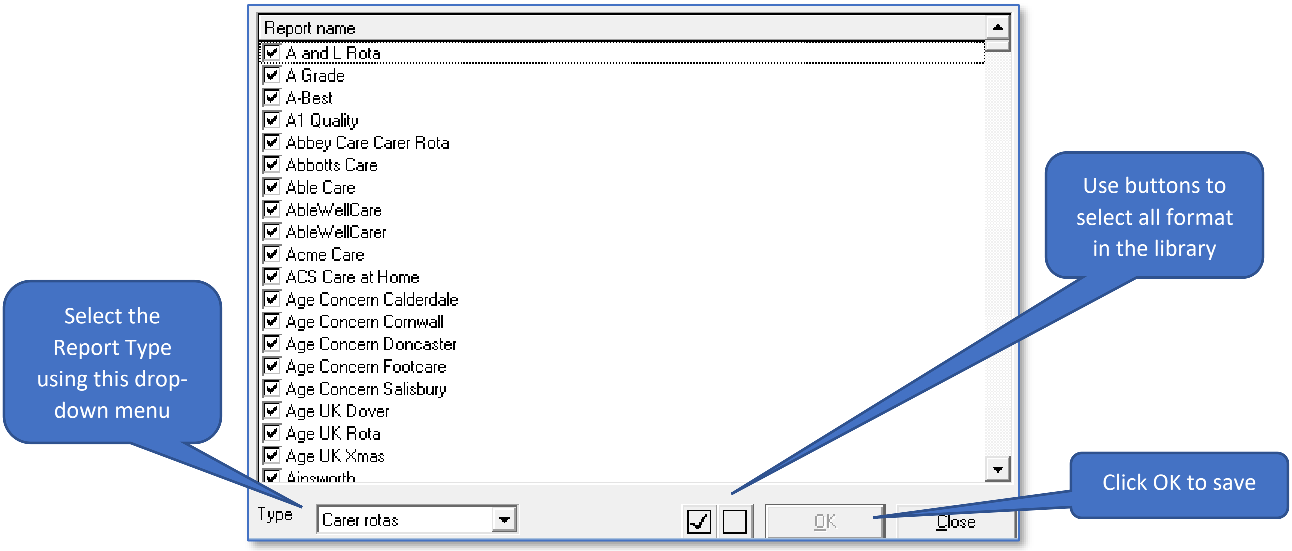


Gain Access to more Report Formats using Reports Setup

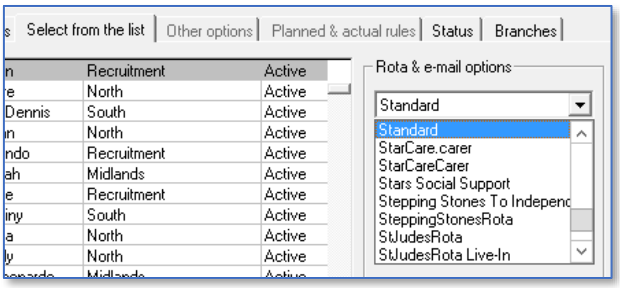
Over many years we have created hundreds of bespoke report formats for our Clients in response to their specific organisational requirements. It is possible to browse through the formats we have created to see if any of our existing Rota/Invoice/Wage Sheet/Care Plan/Risk Assessments would suit the needs of your organisation.

1. Open the **Tools** menu
2. Click **Reports Setup**





3. Once you have selected some new formats and clicked **OK** to save, close the reports screen and re-open to refresh the formats drop-down menu
4. Go back and try running your Rotas using a different format, using the drop-down menu in the **Select from List** tab



Useful Reports in CareFree

There are over 300 different reports within CareFree. Once you have practiced generating Rotas in reports, it is best practice to access some of the other reports within the database. The reports module is extremely flexible and you should be able to find information relating to virtually any aspect of your business within the system. Listed below are some useful reports with brief descriptions and guidance on locating them.

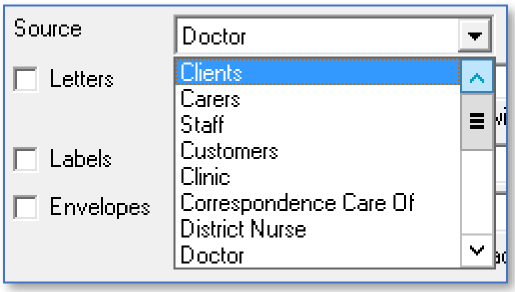
Report Group	Report Name	Report Descriptionscoo
Service Delivery	**Full Weekly Rota**	Shows all calls for all Clients and Carers for a full week, grouped by day
	On Call Report	Report intended to be used by on-call organisers who don't have access to CareFree at nights/weekends
	Verification	Hardcopy of the verification screen showing full list of calls with statuses
Clients	**Birthday List**	Quick list of all Clients who have a birthday in the near future – can specify how many months in advance the report will show (also available for Carers)
	Contact Logs	List of all contact logs for all Clients. Report can be filtered by contact log type and grouped by Client name or log type (also available for Carers)
	Keysafe Numbers	All keysafe numbers for all Clients
	QA Schedules	All planned and completed QA items for all Clients (also available for Carers)
Invoices	**Create & Finalise Invoices**	Calculate, preview and then finalise Invoices
Wages	**Create & Finalise Wages**	Calculate, preview and then finalise Wages
Business	**Forecast Spend & Revenue**	One-page summary showing total care hours and net profit. You can enter prospective hours to see the effect on cash flow
	Profit & Loss	Compares calculated or finalised Invoice values with wages to give indicative profit/loss figure
Electronic Monitoring	**Planned & Actual Times**	Simple comparison by Client, Carer or date showing planned against actual care time delivered
Analysis & Statistics	**Client Statistics**	Shows the number of Carers, Clients and care hours now compared with 12 months ago highlighting % increase/decrease
CQC & RQIA	**AQAA Dataset**	Shows some numerical data relevant to the AQAA dataset
	Continuity of Care	Compliance report showing each Client with the number of Carers allowed against the number actually used
	People Statistics	Statistical report showing people with age, gender, ethnicity and start date

CareFree Mail Merges

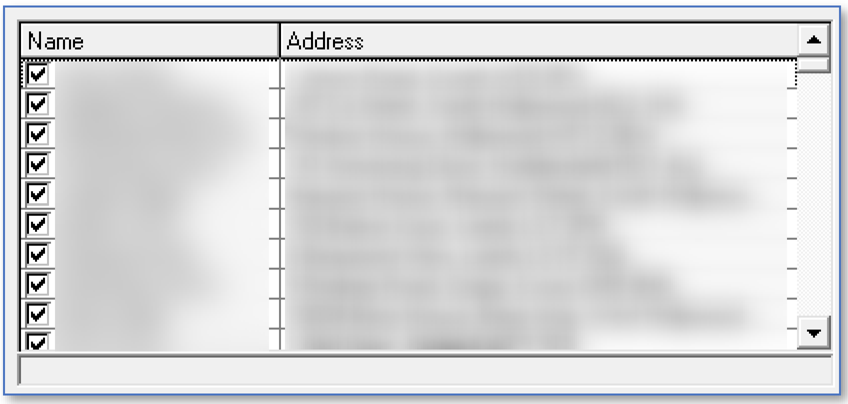
CareFree has the ability to export a mail merge template, with that template you can then create letters via Microsoft Office or some other compatible desktop publishing application. In this example we will be using Microsoft Office Word.

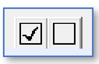
Once the letter has been created with the correct merge fields, its then possible to import that letter back into CareFree and use the system to create the letters for printing or emailing.

1. Go to **Letters** from the top menu bar in CareFree
2. To export a merge template, change the **Source** drop down box to export Clients, Carers, Staff etc.

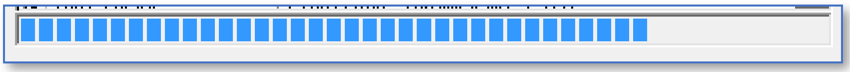


3. When the correct source has been selected tick <u>all</u> sources on the left of the screen

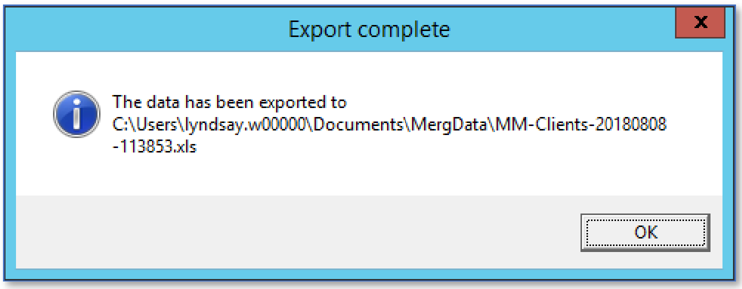


4. Use the  boxes to either tick all or un-tick all items

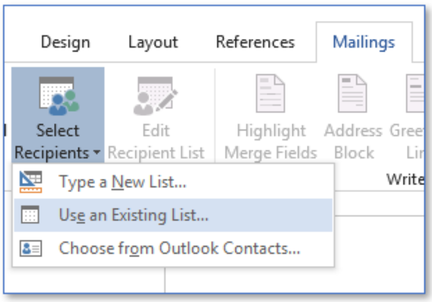
5. The number of sources in your CareFree depends on how long this export will take. A progress bar will load indicating a visual of completion



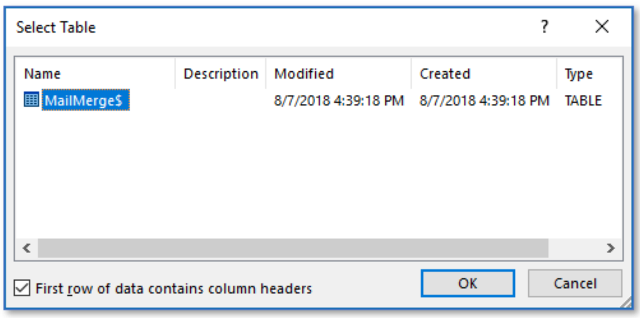
6. A prompt will appear letting you know where the merge export has been saved to



Remember to note down this location as we will need it to create the mail merge document

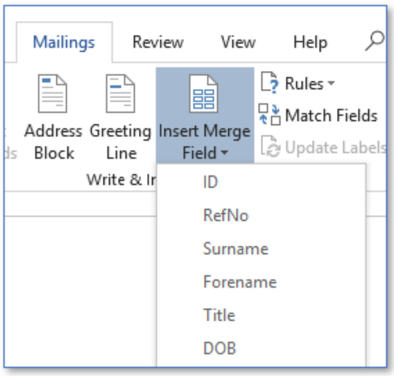


7. Open a new Microsoft Office Word document
8. Click into **Mailings**
9. Click into **Select Recipients**
10. Click **Use an Existing List…**
11. This will open your file explorer, locate the document we exported from CareFree
12. When found, Word will give us the following prompt



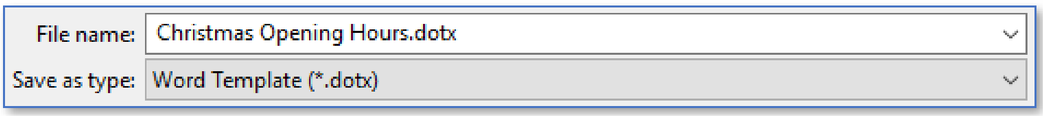
13. Click **OK**

14. In the **Mailings** tab, use the **Insert Merge Field** to enter in what source information you want on the document



15. Write up your letter using the merge fields to fill in the source information

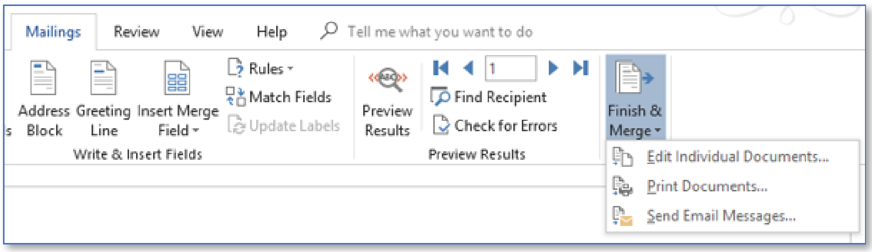
16. If this document would need to used multiple times, i.e. monthly, the document can be saved but ensure the document is saved as a Word Template. Save the word document as usual but in the **Save as Type** drop-down change this to **Word Template**



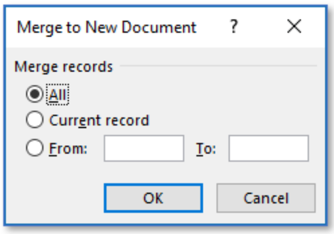
17. To run the mail merge ensure you have the correct merge document open, go to **Mailings**

18. Click **Finish & Merge**

19. Choose the most appropriate option, we recommend to **Edit Individual Document** to allow you to check over the merge



20. Ensure **All** is selected then click **OK**



21. The mail merge will then fill in all the merge fields with the exported information we retrieved from CareFree

Each page of the merge will be an individual source allowing each page to be sent individually