CareFree Webinar – Advanced User Webinar Part 1

Webinar Content

Duration: 1 hour

Section 1 – Introduction to Workflows

- Explanation of Workflows and how they can be Utilised

Section 2 – Setting Up Workflow

- Creating a Workflow
- Automatically Add Workflows to new starters Workflow Security Tab
- Adding Stages to a Workflow
- Reordering Stages

Section 3 – Applying a Workflow to a Client/Carer

- Applying Workflows via the Workflow Screen
- Applying Workflows via the Security Tab
- Entering a Workflow Start Date or No Start Date
- Completing Stages on a Workflow
- Previewing, Printing, Exporting or Emailing Workflows

Section 4 – Workflow Planner

- Accessing the Workflow Planner
- Switching from Carers to Clients
- Workflow Type Drop-Down
- Completing Stages from the Workflow Planner
- Previewing, Printing, Exporting or Emailing Workflows

Section 5 – Contact Logs and Workflow

- Creating a Contact Log from the Carer/Client Record
- Creating a Contact Log from the Rota
- Creating a Contact Log from the Daily Log
- Applying a Workflow from a Contact Log

Section 6 – Documents & Policies

- Attaching Documents in Documents & Policies
- Viewing Documents in Documents & Policies when Creating Log/QA

Section 7 – Reports

- Carer Workflow Report
- Carer Contact Log Report
- Client Workflow Report
- Client Contact Log Report

Section 8 – Questions & Answers