**Items and where they are used.**

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| --- | --- | --- |
| Item | What its used for | Location |
| Accommodation Types | You can filter out the ‘List of Clients’ report based on Accommodation Types | Clients Screen -> Other Details |
| Age-Categories | You can group reports based on Age-Categories. | Clients Screen -> General |
| Agencies | Not used at present. Some customers might use this for other things. |  |
| Agency Types | Not used at present. Some customers might use this for other things. |  |
| Alert Responses | Allows the user to give an Alert Response | Alerts screen (Timesheets -> Current Activity -> Alerts tab) |
| Areas | Was used by ROI companies before Loc8 codes were introduced as a version of ROI postcodes. Some customers might use this for other things. |  |
| Arrangements | Used in NMDS | Tools -> Options -> NMDS Carer Setup |
| Assessment Categories | Not used at present. Some customers might use this for other things. |  |
| Assessors | Used in Assessments screen to show who did the assessing |  |
| Away Reasons | This allows the user to create an Away reasons which are used for Away periods, and Paying for Away periods. | Rota -> Away Periods  Rules -> Away Periods |
| Bank Holidays | This allows the user to set Bank Holiday and Public Holidays, which effect the Pay |  |
| Banks | Allows to user to create Bank details to be used for Carers | Carers Screen -> Payroll tab |
| Branches | Allows the user to create new branches, which are then used to split carers/clients and filter some lists in Carefree. This also allows you to restrict users views on Branches |  |
| Carers and Weeks | Allows the user to specify which carers are visible to work on which weeks (Call rotations) | Rotational Calls |
| Charge Bands | Used as an alternative to contracts for charge rules so you can charge based on which band a client has instead of which contract a call has | Clients Screen -> Other Details |
| Client Types | Allows you to create client types which are used to filter on reports. | Clients Screen -> Other Details |
| Company | Allows the user to create new Companies to group the Branches, which are then used to split carers/clients and filter some lists in Carefree. This also allows you to restrict users views on Companies |  |
| Contact Types | This allows the user to create contact types. Can be used to group by on some reports. (Contacts report) | View -> Contacts |
| Contract Types | This allows the user to create contract types. Can be used to group by on some reports. | Contracts Screen -> General |
| Counties | Used mostly by NI and ROI customers as an extra address field |  |
| Discounts | Allows the user to setup automatic discounts, which are applied to Contracts | Contracts Screen -> Other |
| Document Types | Used in Policies & Procedures to set up new documents for what to do when things happen | Personnel -> Documents & Policies |
| Employment Status | Allows the user to create Employment statuses. Which are used in the Carers screen | Carers Screen -> Payroll |
| End destinations | Used in the carers to record where they went to after they left the company |  |
| End Reasons | Allows the user to create end reasons which are used in the carer or client screen, to give a reason why the record has been ended. | Carer Screen -> Other Details  Client Screen -> Other Details |
| Envelope Sizes | Allows the user to add more envelope sizes, to be used when printing on envelopes | Letters Screen -> Envelopes |
| Ethnic Groups | Allows the user to create an ethnic group to be used for things such as Contacts, as well as matching criteria when rostering. | View -> Contacts |
| Exclusion Reasons | Allows the user to create reasons for exclusion between carer and carer or carer and client. Used to stop or warn when rostering. | Clients Screen -> Preferences  Carer Screen -> Preferences |
| Expense Reasons | Allows the user create Expense reasons to be used when adding Additions and Adjustments, or call expenses. | Tools -> Invoices and Wages -> Additions and Adjustments  Rota -> Open call -> Expenses and Mileage tab |
| Extra Fields | Extra Field can be altered by the user for all Clients, Carers and Customers | Clients -> Extra tab  Carers -> Extra tab  Customers -> Extra tab |
| Genders | Allows the user to add Genders which are used for Carer, Clients and Contacts.  Also able to filter reports based on this. | Clients -> General  Carers -> General  Contacts -> Other details |
| General Vulnerability | For use on the Vulnerability management screen. Able to run the Medication RAG.xls | Client -> Medication |
| Housing Schemes | Used for client information only and as a filter in the client list report |  |
| Issue Types | Allows the user to add more Items to the Issues Items list.  Also able to run the ‘Issued items’ report based on this. | Carer -> Issued Items  Client -> Issued Items |
| Languages | Allows the user to add Languages to be used in reports and added to carers, clients and Main carers | View -> Clients -> Preferences  View -> Carers -> Preferences  View -> Main Carers -> Preferences |
| Learning Types | Used in QA Schedules |  |
| Locations | Used to map geo values (Lat & Long) to postcodes & Loc8 codes |  |
| Log Types | Log Types can be added to be used in Logs. These can also be used to group or filter on reports. | Carer -> Logs  Client -> Logs |
| Managers | Used in carer screen and as filters in some carer reports |  |
| MAR Formats | Used for printing Medical Administration Record reports for clients |  |
| Marital Status | Used in client & carer preferences and some stats reports |  |
| Marketing Source | Used in client preferences to record where the client came from |  |
| Medication | For use on the Vulnerability management and medication screen. Able to run the Medication RAG.xls or Medications report. | Client -> Medication |
| Medication Forms | For use on the Vulnerability management and medication screen. Able to run the Medication RAG.xls or Medications report. | Client -> Medication |
| Medication Levels | For use on the Vulnerability management screen. Able to run the Medication RAG.xls | Client -> Medication |
| Medication Routes | For use on the Medication screen. Able to run the Medications report. | Client -> Medication |
| Medication Support Required | For use on the Medication screen. Able to run the Medications report. | Client -> Medication |
| Nationalities | Used in client & carer preferences and some stats reports and NMDS |  |
| Need Categories | Allows the user to create Need categories which are used to categorise the needs.  The categories can be used to filter or group on some reports |  |
| Needs | Allows the user to create Needs which are used to display the purpose of a call, along with the ability to pay on the need.  The needs can be used for some reports. | Rota -> Call -> Needs tab  Contract -> Needs tab |
| Occupations | Used for Main Carer other details in Preferences for information only |  |
| Outcomes | Used for new module of Outcomes monitoring. This needs to be turned on (at a cost for customers) |  |
| Pay Frequencies | Used for carer information, as a filter for carer wages and NMDS |  |
| Pay Scales | Used for carer information only |  |
| Payment Methods | The user is able to add payment methods which can be used when adding payments to Invoices. | Clients -> Invoices tab -> Make Payments |
| Phone Problems | Phone problems can be added, which stop transactions with ECM and set calls to done. | Client -> General |
| Pre-set Messages | Pre-set messages can be created to be used when sending SMS or Emails via Carefree | Tools -> Send a message  Tools -> Send an email |
| Prioritised Needs | Used to determine which needs are most important and therefore which unallocated calls need to take priority. You can sort unallocated calls by prioritised need |  |
| QA Months | Allows the user to set what months QA’s can be counted and set. | QA’s screen |
| QA Satisfaction Score | Allows the user to set scores which can be used on the QA’s themselves. | QA’s screen |
| QA Type Categories | Used to filter QA types for additional reporting | QA’s screen |
| QA Types | Used to filter QA Schedules by different types for reporting | QA’s screen |
| Qualifications | Allows the user to add Qualifications which can be used in reports as well as exclusions. | Carers -> Qualifications |
| Recent Concerns | For use on the Vulnerability management screen. Able to run the Medication RAG.xls | Client -> Medication |
| Recruitment Sources | For use in the NMDS setup screen. Also used in the NMDS reports. | Tools -> Options and Settings -> NMDS setup |
| Religions | Allows the user to create religions to be used for things such as Contacts, as well as matching criteria when rostering. | View -> Contacts |
| Risk Areas | Used as the top level in the Risk Assessment tree structure. All risk assessments have a Risk Area under which we have categories then levels |  |
| Risk Categories | All risk assessments have a Risk Area under which we have categories then levels |  |
| Risk Levels | All risk assessments have a Risk Area under which we have categories then levels |  |
| Risk Type | Allows the user to set types of risks that can set in the Clients screen, and filtering reports based on this. | Clients -> Other details. |
| RoadRunner Reporting | Used in the portal for reporting |  |
| Roles | Allows the user to add Carer roles which are used to group carers. This also allows the company to set pay rules based on the carer role. | Carers Screen -> Payroll tab |
| Runs | Allows the user to Add runs into carefree, where calls can be added into ‘Groups’ or ‘Runs’ | Rota Screen -> Runs |
| Service Elements | Used Ion Agreements, in the details section (But only when we link with Hillingdon) – Not in use anymore |  |
| Service Types | Used for Company NMDS settings | Shared Options -> NMDS (Company name) -> Main service type |
| Service Users | Used Ion Agreements, in the details section (But only when we link with Hillingdon) – Not in use anymore |  |
| Sexual Orientation | Allows the user to add sexual orientation. |  |
| Site Types | This allows the create Site Types which are used to define what type of Site they are living in. | Client -> General |
| Sites | This allows the create Sites which group client on different sites (locations). You are also able to filter some reports based on Site. | Client -> General |
| Special Needs | Used in Client details to list special needs a client might have and the training needed for those needs. Further used in allocations to matched trained carers |  |
| Task Types | Used for new module of Outcomes monitoring. This needs to be turned on (at a cost for customers) |  |
| Time Specific Dose | For use on the Vulnerability management screen. Able to run the Medication RAG.xls | Client -> Medication |
| Time Zones | Used to translate times into zones for rotas so you can print AM, Lunch etc |  |
| Titles | Allows the user to add titles to be used when adding Carers, Clients, Customers and Contacts. | Clients Screen -> General  Carer Screen -> General  Contacts Screen -> General  Customer Screen -> General |
| Transport Types | Used in Carers to record what transport they use, can also filter some carer list reports |  |
| User Roles | Used to determine which areas of the system a user can access and what functionality they have available |  |
| Variables Does | For use on the Vulnerability management screen. Able to run the Medication RAG.xls | Client -> Medication |
| Variation Reasons | Used in the verify screen when manual changes are made to calls |  |
| VAT Rates | Allows the user to set a VAT Rate on Customers | Customers Screen -> Customer Details tab |
| Venues | Used in QA schedules to record where the training took place |  |
| Warnings | Allows the user to add Warning which can be set on the Clients screen. These then display when a user clicks on the Clients screen or rota. | Clients screen -> Warnings tab |