

Administrators Portal Training Guide



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Introduction to the Portal

This Training Guide will explain how use the CareFree Portal from an Administrator account.

The Portal can be used to view:

- Carer and/or Client rotas
- Invoices and/or Wage Sheets
- Contact Logs
- Documents
- Emergency Contacts

The Administrator will have an overview of all these facilities, add and amend users and change the Portal Options.

Logging into the Portal

1. Open the link to access the Portal

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

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

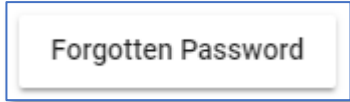


3. Click **Login**

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

Forgotten Password

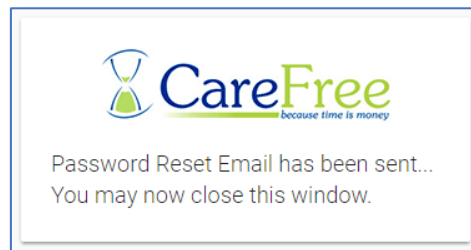
Passwords can be reset from the Login screen by clicking **Forgotten Password**.



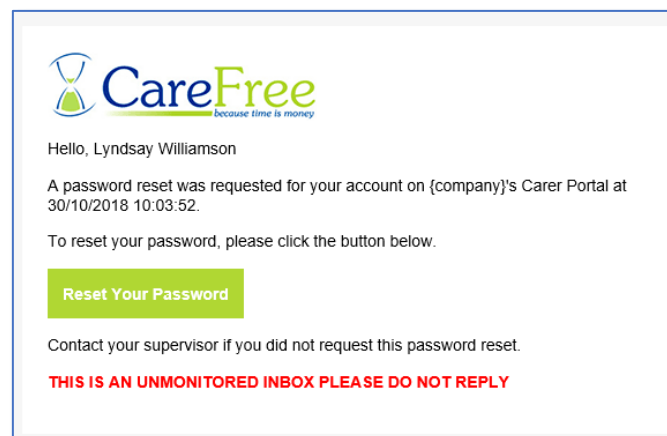
1. Enter the email address which is used to log in with



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



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

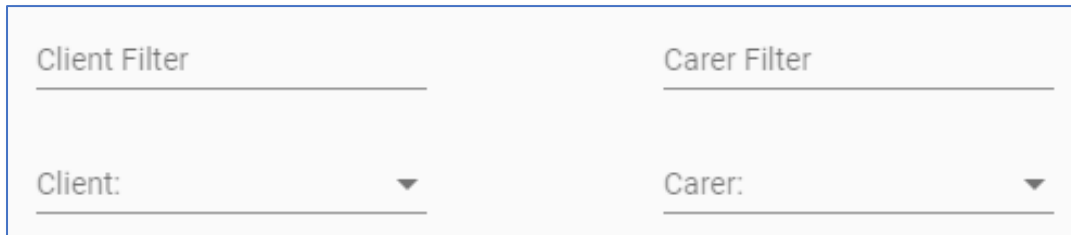


4. Click **Reset Your Password** to enter a new password

Home Screen Overview

The Administrator account will display a Carer and/or Client drop-down box. This will allow you to filter which Carer/Client details are to be displayed.

Type into the Client/Carer Filter fields to filter the list of Clients/Carers then use the dropdowns to select the filtered Client/Carer.

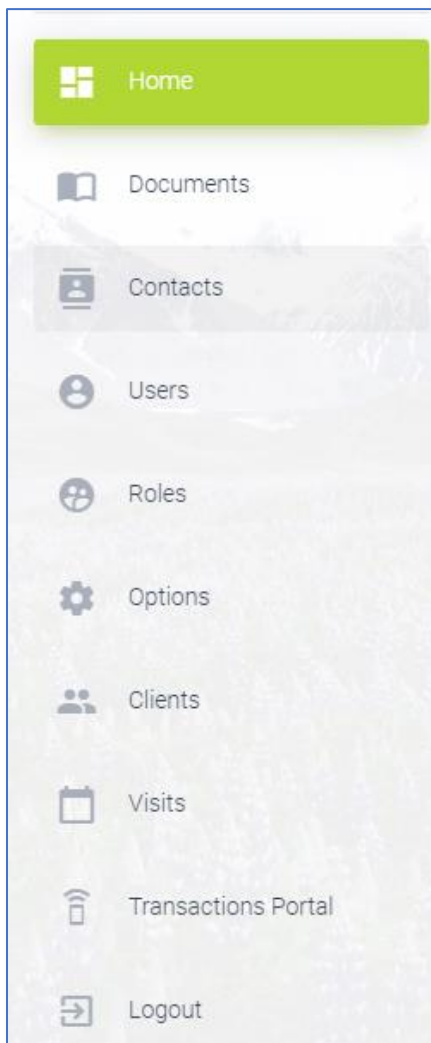
A screenshot of a web interface showing two filter fields. On the left, there is a text input field labeled 'Client Filter' with a horizontal line underneath. Below it is a dropdown menu labeled 'Client:' with a downward-pointing arrow. On the right, there is a text input field labeled 'Carer Filter' with a horizontal line underneath. Below it is a dropdown menu labeled 'Carer:' with a downward-pointing arrow.

Your organisation may only have access to Carer or Client Portal, which means you will either see the Client filter or the Carer filter

The left of the home screen will display a navigation bar, which the next few sections of this training guide will explain.

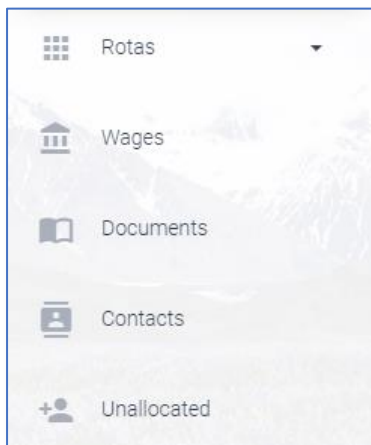
If a Carer or Client is selected using the drop-down boxes above this navigation menu will change.

Menu Options



- **Home** – will direct you back to the Portal home page
- **Documents** – Upload/View Documents for Carers/Clients – go to [page 9](#) for more information
- **Contacts** – Add/Edit/View Contacts on the Portal – go to [page 13](#) for more information
- **Users** – manage Users who can access the Portal – go to [page 15](#) for more information
- **Roles** – will allow you to manage user permissions – go to [page 19](#) for more information
- **Options** – will allow you to change the Portal Options – go to [page 22](#) for more information
- **Clients** – will allow you to view all a list of Visits per Client– go to [page 24](#) for more information
- **Visits** – will allow you to view all a list of Visits – go to [page 27](#) for more information
- **Transaction Portal** – will take you to the login page for the Transaction Portal
- **Logout** – to log out of the Portal, click **Logout**

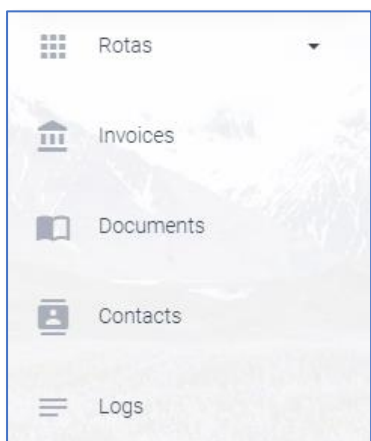
If a Carer is selected using the top drop-down filters the navigation menu will also include:



- **Rotas** – displays the Carers rota
- **Wages** – displays the Carers wage sheets
- **Unallocated** – displays unallocated calls to the Carer, which they can request to cover

This information is only accessible if your company has access to the Carer Portal. To view more information on the Carer Portal, see the Training Booklets for the Carer Portal

If a Client is selected using the top drop-down filters the navigation menu will also include:



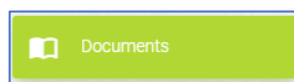
- **Rotas** – displays the Clients rota
- **Invoices** – displays the Clients invoices
- **Logs** – displays any logs recorded against the Client
- **Contact Office** – allows the Client to contact the office




This information is only accessible if your company has access to the Client Portal. To view more information on the Client Portal, see the Training Booklets for the Client Portal

Documents

Documents can be uploaded onto the Portal by Administrators and made available for the Carer and/or Client to view.

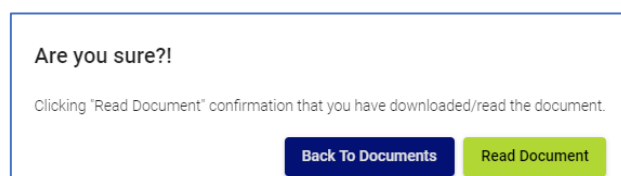
Click **Documents** from the navigation menu.



1	To upload a document, click Upload Document
2	The name of the document is displayed under Document
3	The date the document was uploaded to the Portal is displayed under Date Uploaded
4	The Group is the group that has access to the document
5	To view the document, click the  button
6	Click the  button to view who has viewed the document and when they last viewed the document
7	Click the  button to delete the document from the Portal – when a document has been deleted the document will turn red

Viewing a Document

When pressing the  button for a document, a prompt will appear.



By pressing **Read Document** this will show the Administrators of the Portal that a Client/Carer has read the document. The document will download shortly after.

Document Views


To see who has read the document click the  button.

This screen will display a list of all the users who have read the document (as shown above). You can see which users have viewed the document in the **Viewer** column and when each individual user has viewed the document in the **Date Viewed** column.

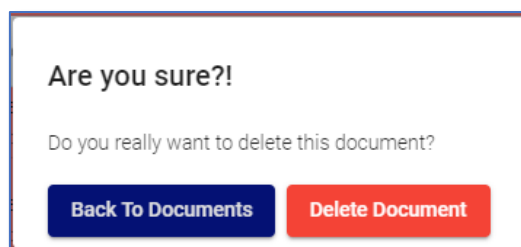
Document	Date Uploaded	Group	Date Viewed	Viewer
2019-02-11_10h35_01.png	Friday, February 15 11:03:19	AllCarers	Monday, February 25 14:40:21	Owen Wilson



Items per page: 10 1 - 1 of 1 << < > >>




Deleting a Document

Documents can be deleted by pressing the  button. Only Administrators have the ability to delete documents.

Click **Delete Document** to remove the document from the group of users that have access to it. Alternatively, click **Back to Document** to return to the documents list.



Deleted documents will appear in red on the documents list only for Administrators of the Portal. Administrators still have access to view the document and who has read the document using the  and  buttons.

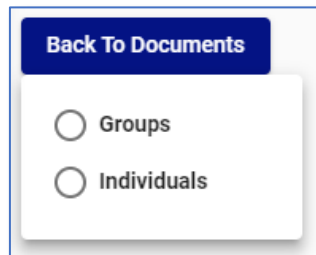
UPDATING - Training Booklet - CareFree Admin Portals v2:1 Document v1.docx	Wednesday, February 13 10:44	All Clients			
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Uploading a Document

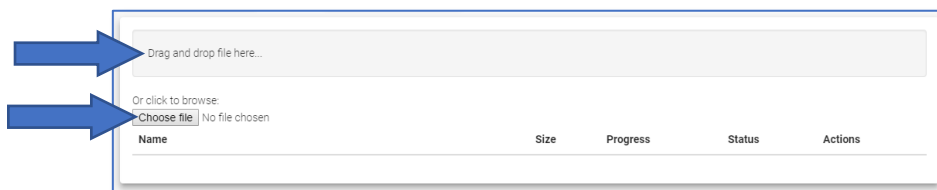
1. Open the **Documents** screen and click **Upload Documents**



2. We need to specify who the audience of the document will be available to – start by choosing whether the audience is a **Group** or an **Individual**



3. Use [page 12](#) for details on how to choose the correct audience for the document
4. Once an audience is selected, the following box will appear

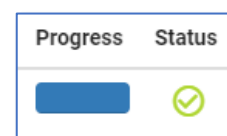


5. Either drag and drop a file into the area named **Drag and Drop File Here...** or click **Choose File** to search for the document
6. Details of the file are shown when chosen

Name	Size	Progress	Status	Actions
Internal Training - Portals v2.1.pdf	0.147 MB	<input type="text"/>		<input type="button" value="Upload"/> <input type="button" value="Delete Upload"/>

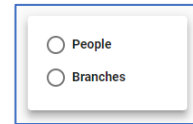
7. Click **Upload** to upload the document to the Portal, alternatively click **Delete Upload** if the file was chosen incorrectly

8. The **Progress** bar will load as the file is uploading, the **Status** column will show when the file has successfully uploaded

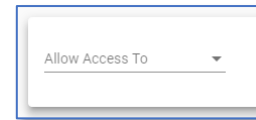


Selecting a Group Audience

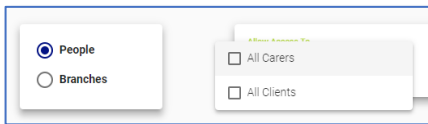
1. If the **Group** option is selected, choose whether the audience is a group of **People** or a **Branch**
2. Use the drop-down box **Allow Access To** to specify who the document is available to



People
 Branches



Allow Access To ▾

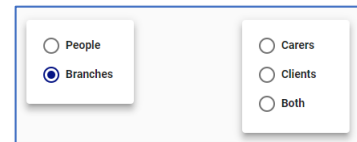


People
 Branches

All Carers
 All Clients

3. If the **People** option is selected, you will have the option of choosing **All Carers** and/or **All Clients** (depending on which Portal(s) you have)

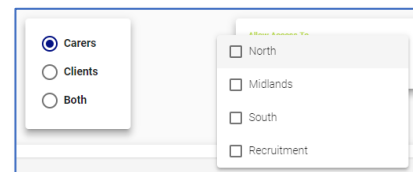
4. If the **Branches** option is selected, you will have the option of choosing **Carer, Clients** or **Both**



People
 Branches

Carers
 Clients
 Both

5. After making your choice, you will have the option of choosing specific branches from your company (multiple branches can be selected)

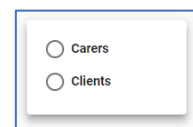


Carers
 Clients
 Both

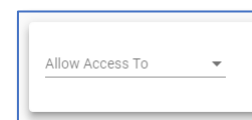
North
 Midlands
 South
 Recruitment

Selecting an Individual Audience

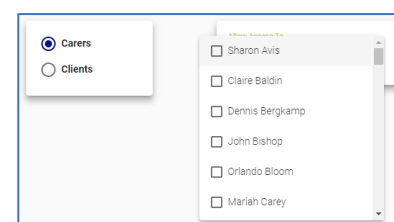
1. If the **Individuals** option is selected, choose whether the audience is a group of **People** or a **Branch**
2. Use the drop-down box **Allow Access To** to specify who the document is available to
3. Choose from a list of **Carers** or **Clients**, depending on what was selected previously (multiple Carers or Clients can be selected)



Carers
 Clients



Allow Access To ▾



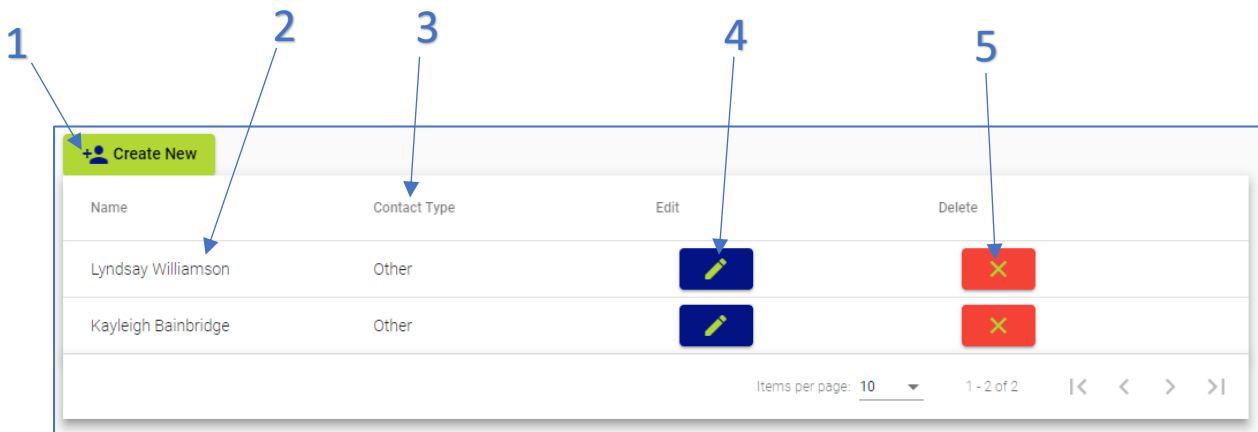
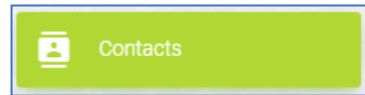
Carers
 Clients



Sharon Avis
 Claire Baldin
 Dennis Bergkamp
 John Bishop
 Orlando Bloom
 Mariah Carey

Contacts

Contacts for Carers and/or Clients can be added to the Portal. These can act as a main point of Contact for the Carer/Client i.e. a Supervisor or a Manager.

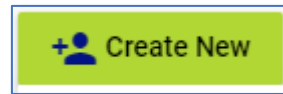
Click **Contacts** from the navigation menu.



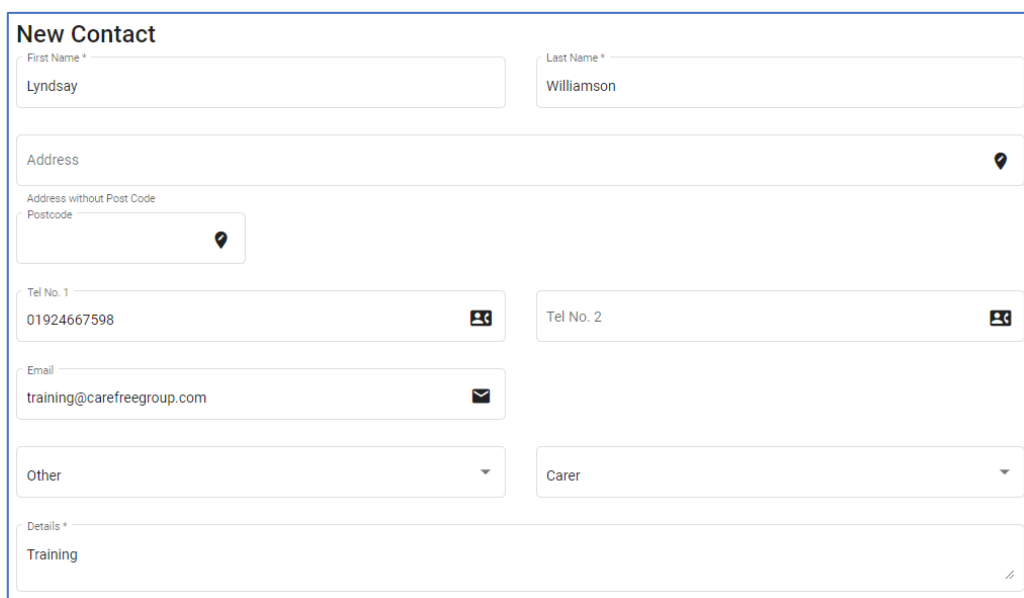
1	To create a new Contact click Create New – see page 14 for more information
2	The name of the Contact is displayed under Name
3	The relationship of the Contact to the Carer/Client is displayed under Contact Type
4	To edit the Contact, click the  button
5	To delete the Contact, click the  button

Creating a New Contact

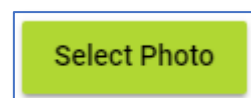
1. From the Contacts screen click **Create New**



2. Fill in all the appropriate information on the **New Contact** screen i.e. **Name, Address, Postcode, Telephone, Email, Contact Type** and **Contact Details**
3. Use the **Client/Carer/Both** drop-down to choose who the contact will be made available to (*this option is only necessary to use if you are using both Carer and Client Portals*)

A screenshot of a web form titled "New Contact". The form has several input fields: "First Name *" with "Lyndsay", "Last Name *" with "Williamson", "Address" with a location pin icon, "Address without Post Code" and "Postcode" both with location pin icons, "Tel No. 1" with "01924667598" and a mobile phone icon, "Tel No. 2" with a mobile phone icon, "Email" with "training@carefreegroup.com" and an email icon, "Other" and "Carer" both with dropdown menus, and "Details *" with "Training" and a pencil icon.

4. To upload a photo of the Contact click **Select Photo** at the bottom of the Contact information
5. Find the photo to link to the new Contact, the photo will display before saving



6. Click **Submit** to save the new Contact



Users

The Users screen will allow the Administrator to create new users to the Portal and have ability to change user passwords. Administrators can create Carer, Client and other Administrator user accounts.

Click **Users** from the navigation menu.



User Name	Name	Email	Role	Enabled?	Locked Out?	Edit	Delete
admin	Inbuilt Administrator	support2@carefreegAdministrator		true	false		
Claire	Claire Baldin	carer@carefreegroupCarer (Portal)		true	false		
client	Pauline Chuckle	client@carefreegroupClient (Portal)		true	false		
SueBarker	Sue Barker	lyndsay.w@carefreeClient (Portal)		true	false		

1	To create a new user, click Create User – see page 17 for more information
2	Use the Filter field to search for a name in the user list
3	Details of the user are listed in the User Name, Name, Email and Role columns
4	Import Carers will allow you the import all of your Carers from CareFree into the Portal – see page 16 for more information
5	Import Clients will allow you the import all of your Carers from CareFree into the Portal – see page 16 for more information
6	Resend Activations will send out the initial activation email that is sent to new users
7	Click the button to Edit the user details. Use this button to change passwords
8	Click the button to Delete the user

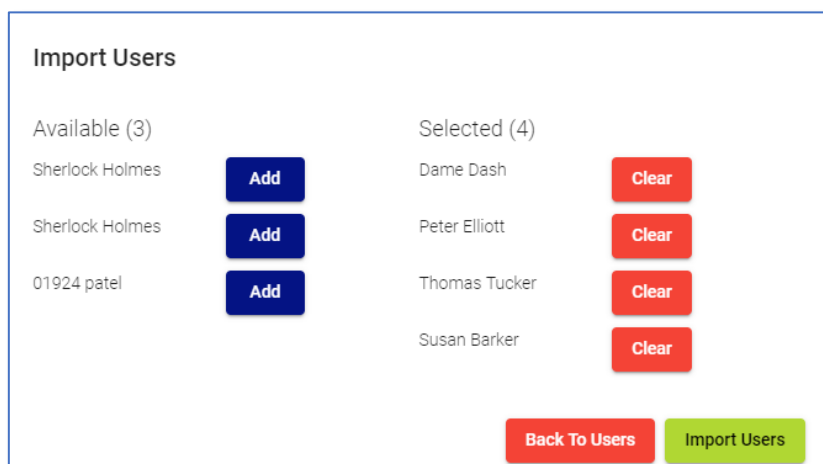
Importing Carers/Clients

Carers and/or Clients can be imported into the Portal depending on which Portal(s) you have access to. If you only have access to the Carer Portal you will only be able to see the Import Carers button on the Users screen, and vice versa.



This functionality is an optional feature as users can still be added manually. However, especially when setting the Portal up for the first time, importing Carers and/or Clients can be a quick and easy method of adding all of your necessary users into the Portal.

By clicking **Import Carers** or **Import Clients** you will receive a list of all Carers/Clients that will be pulled into the Portal.



Select the Carers/Clients you wish to import, then click **Import Users** to confirm.

The Carers email address that is entered in CareFree will be the email address used for the Portal.

Every imported user will then receive an email asking to activate their account – see the Carer/Client Training Booklet for more information.

Creating a New User

1. Click **Users** from the navigation menu
2. Click **Create User**

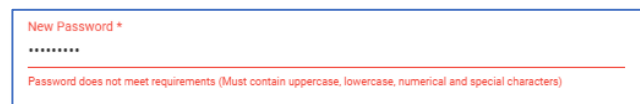
A screenshot of the "Create User" form. It has a title "Create User" and a section "User Details". The form contains the following fields: "Role" with a dropdown menu showing "Carer (Portal)"; "Linked Carer" with a dropdown menu showing "Dench, Judy"; "User Name" with the text "JudyDench"; and "Email" with the text "judy.d@carefreegroup.com". At the bottom right, there are "Cancel" and "Create User" buttons.

3. Enter the **Role, Linked CareFree User** (or Carer/Client record) and **Username**

Roles can be created – see [page 19](#) for more information

4. Scroll down the screen to enter the Password

5. The Password must contain an uppercase, lowercase, numerical and special character – if this requirement is not met a prompt will appear

A screenshot of the "Create User" form, scrolled down to the password section. It shows "New Password" and "Confirm Password" fields, both filled with asterisks. Below these is the "Full Name" field with the text "Lee Dixon". At the bottom, there is a checkbox labeled "Is Active?" which is checked. "Cancel" and "Create User" buttons are at the bottom right.

6. Tick the **Is Active?** tick box to determine whether the user is active or not

7. Click **Create User** to save the user

Changing User Passwords

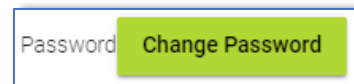
1. Click **Users** from the navigation menu



2. To edit a specific user, click the edit button next to the relevant user



3. Click **Change Password**



4. Enter the new password in the **New Password** and **Confirm Password** fields

New Password *

Confirm Password *

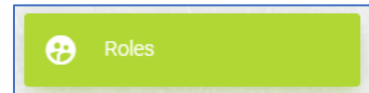
5. Click **Save User** to save the new password



Roles

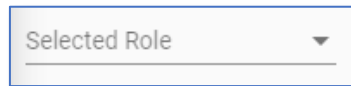
The Roles screen allows a user to create new user roles and amend existing user roles.

To access the Roles screen, click **Roles** from the navigation menu.

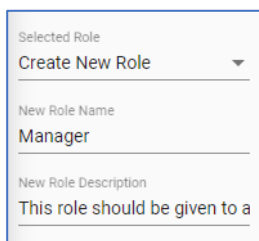
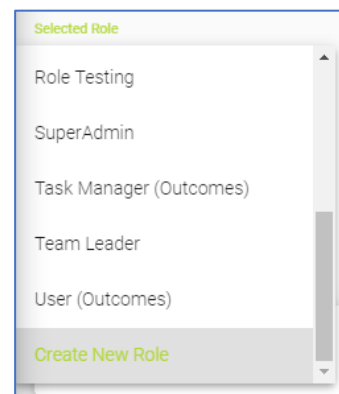


Creating a New User Role

1. Use the **Selected Roles** drop-down menu to select an existing role



2. Select the option **Create New Role** at the bottom of the list



3. Enter in your **New Role Name** along with a **New Role Description**

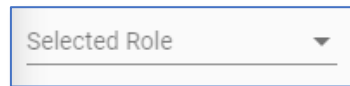
The Description is optional

4. Tick the necessary permissions for the new role – see [page 21](#) for more information on what each section relates to
5. Click **Save** to save the new role

The role will now be available to choose from when creating a new Portal user ([page 17](#)).

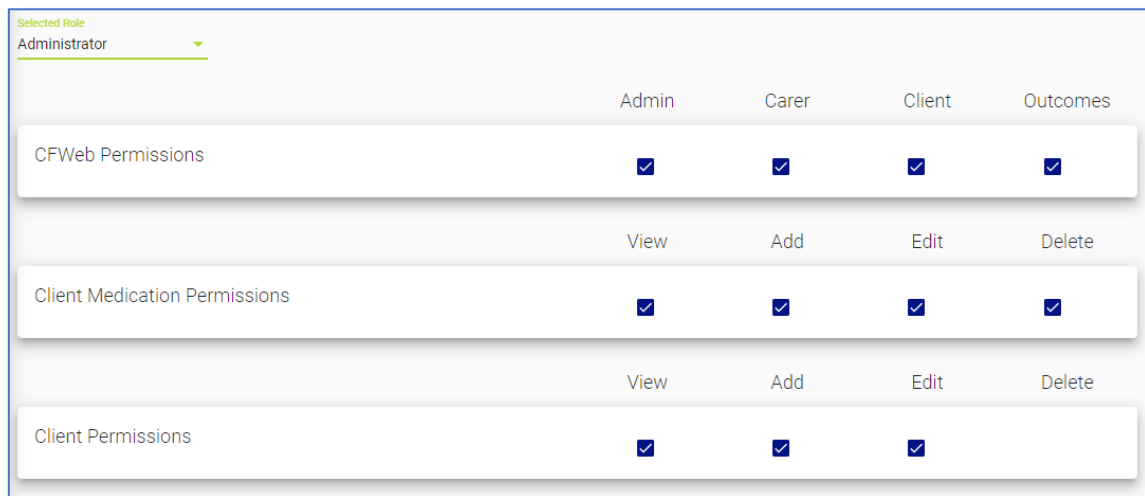
Amending an Existing User Role

1. Use the **Selected Roles** drop-down menu to select an existing role



Selected Role ▼

2. If an existing role is selected, the screen will display what access rights that use role has



The screenshot shows a table with a header row and three data rows. The header row lists permissions: Admin, Carer, Client, and Outcomes. The data rows show the permissions for 'CFWeb Permissions', 'Client Medication Permissions', and 'Client Permissions'. Each cell in the data rows contains a blue checkmark, indicating that all listed permissions are granted to the role.

Selected Role	Admin	Carer	Client	Outcomes
Administrator				
CFWeb Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	View	Add	Edit	Delete
Client Medication Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	View	Add	Edit	Delete
Client Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

3. Tick/Untick the tick boxes to give or take away permissions for that user role
4. Click **Save** to save any changes

User Role Permissions

Use this section to understand what each section means in the Roles section.

CFWeb Permissions	Admin	Gives the user access to the Carer and/or Client filters at the top of the Portal <i>This option would need enabling for most add/edit delete permissions for other sections</i>
	Carer	Allows the user to log in as a Carer, and view the Carer Portal options
	Client	Allows the user to log in as a Client, and view the Client Portal options
	Outcomes	Allows the user to use Outcome functionality (dependant on whether Outcomes have been enabled on your Portal)
Document Permissions	View	Allows the user to view documents
	Add	Allows the user to add documents <i>Admin in CFWeb would need enabling</i>
	Delete	Allows the user to delete documents <i>Admin in CFWeb would need enabling</i>
Task Permissions	View	Allows the user to view Tasks on a Visit
	Edit	Allows the user to amend Task Management on a Visit
Options Permissions	View	Allows the user to view what Portal options have been set
	Edit	Allows the user to change Portal options
Portal Contact Permissions	View	Allows the user to view Contacts
	Add	Allows the user to add Contacts <i>Admin in CFWeb would need enabling</i>
	Edit	Allows the user to edit Contacts <i>Admin in CFWeb would need enabling</i>
	Delete	Allows the user to delete Contacts <i>Admin in CFWeb would need enabling</i>
Role Permissions	View	Allows the user to view Roles
	Add	Allows the user to add Roles <i>Admin in CFWeb would need enabling</i>
	Edit	Allows the user to edit Roles <i>Admin in CFWeb would need enabling</i>
	Delete	Allows the user to delete Roles <i>Admin in CFWeb would need enabling</i>
User Permissions	View	Allows the user to view Users
	Add	Allows the user to add Users <i>Admin in CFWeb would need enabling</i>
	Edit	Allows the user to edit Users <i>Admin in CFWeb would need enabling</i>
	Delete	Allows the user to delete Users <i>Admin in CFWeb would need enabling</i>
Visit Permissions	View	Allows the user to view Visits

Options

The Options screen will allow the administrator of the Portal to change how the Portal looks and what parts of the system you wish the Carers and/or Clients to use.

Click **Options** from the navigation menu.



Show Documents	Set to True/False to show/hide the Documents button on the navigation menu
Show Support	Set to True/ False to show/hide the Contacts section in the menu
Show Wages	Set to True/False to show/hide the Wages button on the navigation menu
Show Rota Text	Set to True/False to show/hide rota Text on the rota (use rota Text option to enter what text is required)
Rota Text	Enter in the text you wish to show (this option links with Show rota Text)
Show Double Up Tel	When using the Carer Portal, set to True/False to show/hide the double-up Carer's contact number
Show Rota Stats	Set to True/False to show/hide the planned and actual percentages statistics at the top of the rota screen
Show Actual Times	Set to True/False to show/hide the actual times column on the rota
Show Also Known As	Set to True/False to show/hide the AKA field for a Client on the Carers rota
Show Status Column	Set to True/False to show/hide the status column on the rota
Show Double Up	Set to True/False to show/hide the double up Carer on rota/visit details
Show Is Shadowing	Set to True/False to show which Carer is shadowing a Call
Show On Shadowing	Set to True/False to show which Carer is being shadowed on a Call
Show Runs	Set to True/False to show/hide a run on a rota for Carers
Show Location	Set to True/False to show/hide the location of the QA's on the rota
Highlight Rows	Sets the rota row colours to two colours to split the days
Highlight Days	Sets the rota row colours to different colours for different days
Show Client Contacts	Set to True/False to show/hide Clients contacts on the Carers visit detail
Show Carer Details	Set to True/False to show/hide the Carer details on the visit detail for Clients
Show Extended Carer Details	Set to True/False to allow Clients to see Carers Phone Number, Photograph and Qualifications on call
Show Call Notes	Set to True/False to show/hide call notes on the visit detail screen
Allow Detail Updates	Set to True/False to show/hide allows Portal users to submit profile detail updates

Allow Absence Requests	Set to True/False to show/hide the submit absences button from the absences screen
Allow Carer to Submit Actual Times	Set to True/False to show/hide the button to change/cancel a call from the visit detail screen
Allow Carer to Send New Message	Set to True/False to enable the button to send a new message to CareFree
Allow Carer to Request Equipment	Set to True/False to enable the button to submit new equipment requests
Allow Carer to Request Expense	Set to True/False to enable the button to submit new expense requests
Allow Carer Request to Cover a Call	Set to True/False to enable the button to submit a request to cover a call
Allow Client to Request Changes to/Cancel Call	Set to True/False to enable the buttons for a Client to change/cancel a call from the visit detail screen
Allow Client to Make Contact	Set to True/False to enable the make contact menu option for Clients and the button on the log screen
Allow Carer to Submit Call Notes	Set to True/False to enable the Carer to submit Call Notes from a Call

If any options are changed on the portal click **Save** at the bottom of the options screen.



Clients

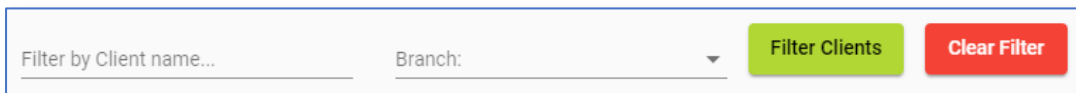
Within the Client screen existing Client Visits can be viewed and searched for. Task Management can also be entered from within this screen if the Carer has not done that themselves.

Searching for a Client

1. Open the **Clients** screen

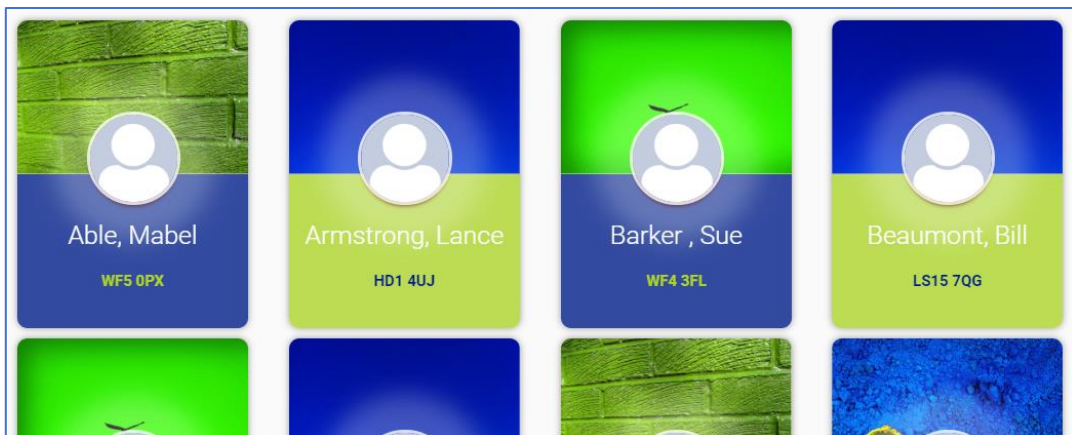


2. Use the filter at the top of the screen to search for the Client you are looking for
3. Click **Filter Clients** to begin the search



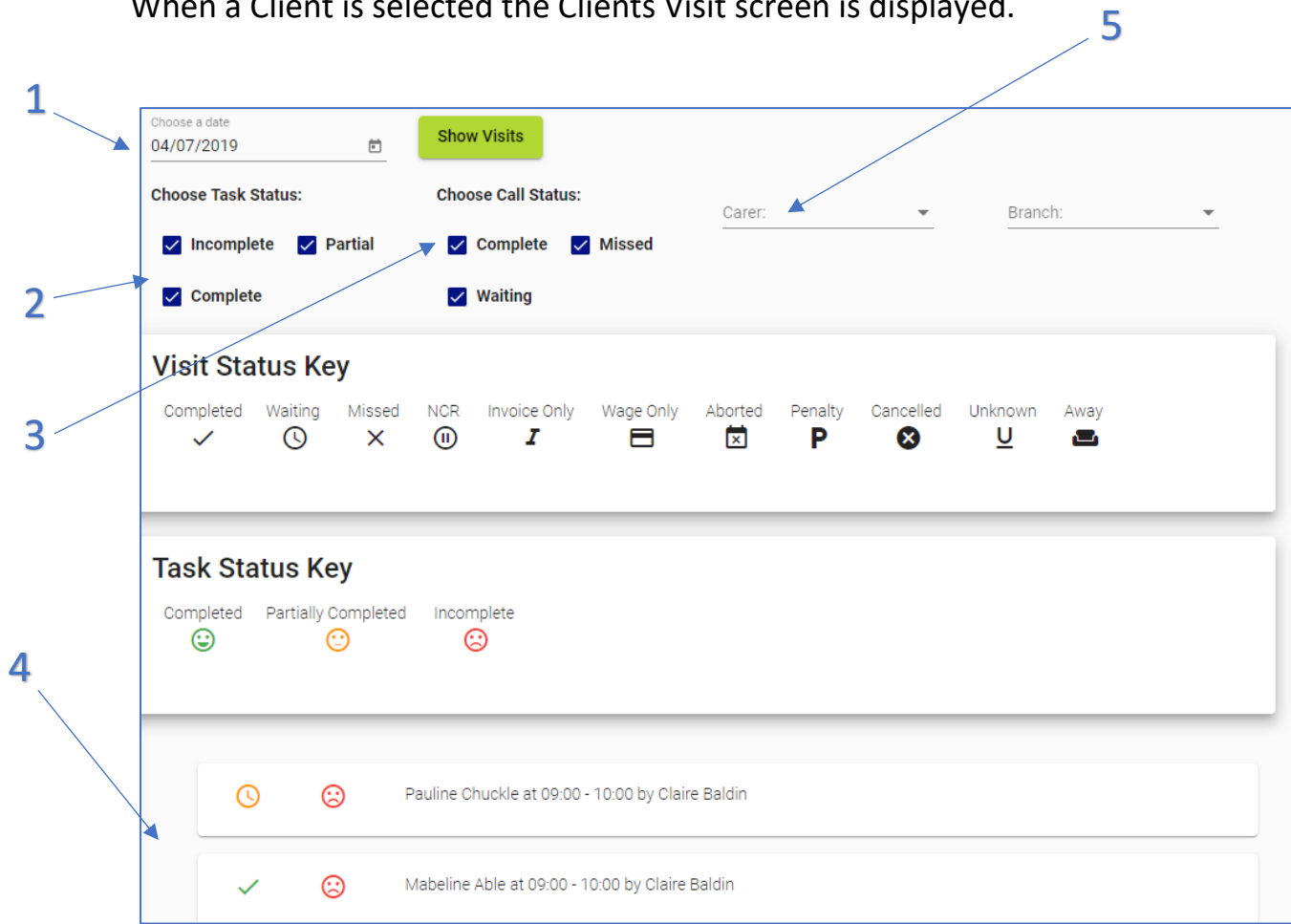
Click Filter Clients with no filters entered to load all Clients

4. Each Client will be displayed as shown below; click the Client you wish to view more details for



Viewing Client Visits

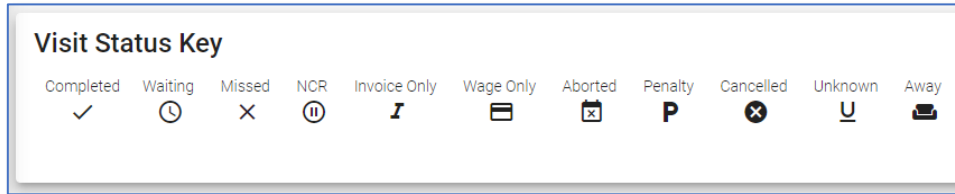
When a Client is selected the Clients Visit screen is displayed.



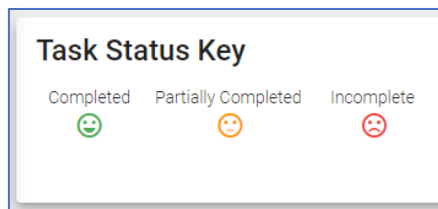
1	Change the date to view visits from a specific date. Choose the small calendar icon to view a month to month calendar view
2	Filter what visits you would like to view, where the task statuses are incomplete, part complete or completed
3	Filter what visits you would like to view, where the call status is complete, missed or waiting
4	Visits are displayed here
5	Use the Carer drop-down box to filter the call by a Carer

Client Visit Indicators

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



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



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

To view more information on completing Tasks and Medications from the Task Management portal see the Training Booklet for the Task Management Portal.

Visits

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

This screen is very similar to that on that Clients screen, see [page 24](#) for more information.

The screenshot shows the 'Client Visits' interface. At the top, there is a date selector set to '17/06/2019' and a 'Show Visits' button. Below this are two filter sections: 'Choose Task Status' with checkboxes for 'Incomplete', 'Partial', and 'Complete' (all checked), and 'Choose Call Status' with checkboxes for 'Complete', 'Missed', and 'Waiting' (all checked). To the right of these are two dropdown menus labeled 'Carer:' and 'Branch:'. Below the filters are two key sections: 'Visit Status Key' with icons for Completed, Waiting, Missed, NCR, Invoice Only, Wage Only, Aborted, Penalty, Cancelled, Unknown, and Away; and 'Task Status Key' with icons for Completed, Partially Completed, and Incomplete. At the bottom, a list of visits is shown, each with a green checkmark icon, a red 'X' icon, and a text description: 'Office Hours at 09:00 - 17:00 by Lee Dixon', 'Mabeline Able at 09:00 - 10:00 by Claire Baldin', 'Pauline Chuckle at 09:00 - 10:00 by Claire Baldin', and 'Lance Armstrong at 11:00 - 12:00 by Claire Baldin'.

This screen has got 2 additional drop-down boxes.

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

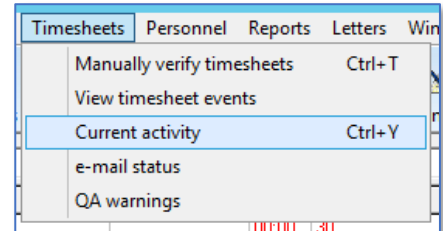
To filter all visits by a specific Carer using the **Carer** filter drop-down box, to filter by branch use the **Branch** filter drop-down box.

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

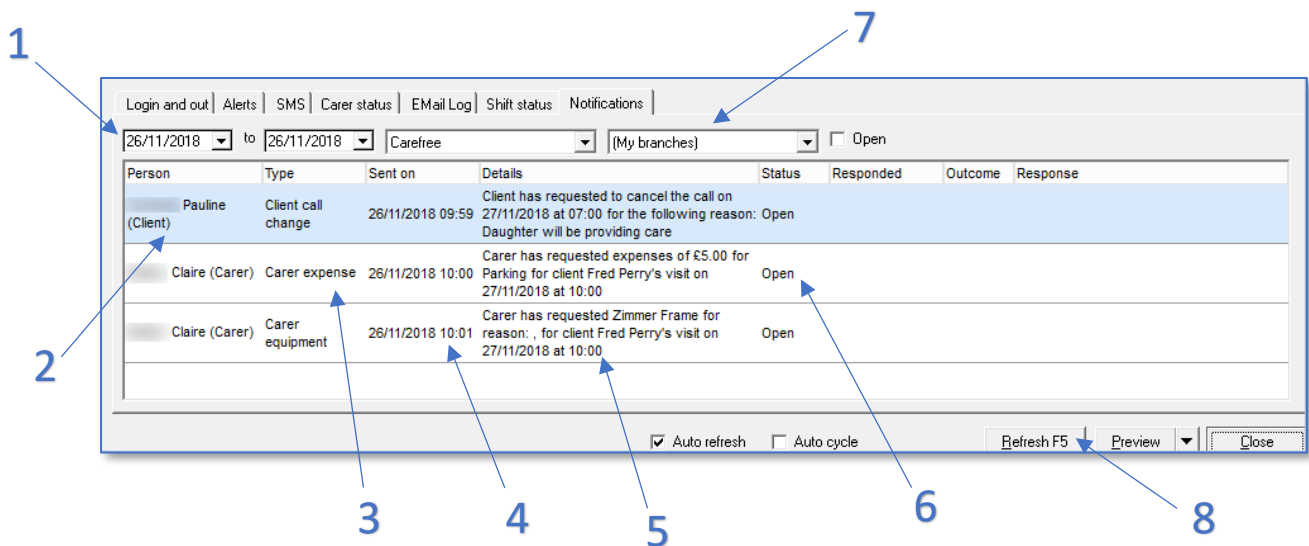
CareFree Notifications

Throughout the Portal, Carers and Clients have the ability to send requests to those who use the CareFree system. It is important to know where these notifications appear in CareFree and how to action them.

1. From the CareFree main menu, click **Timesheets**
2. Click **Current Activity**

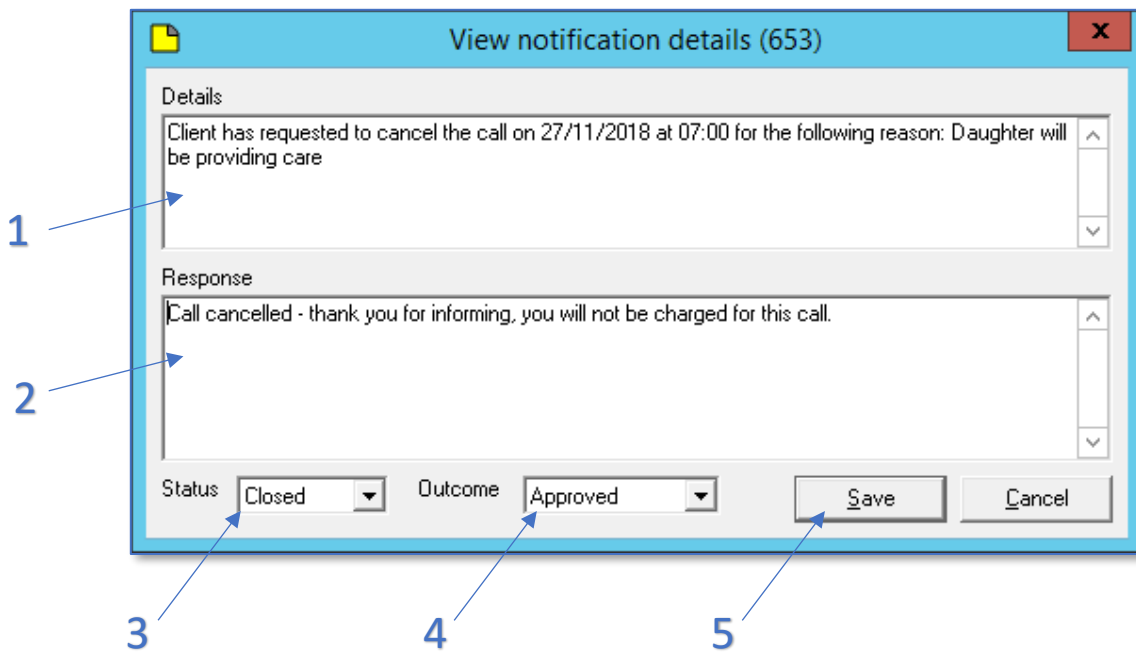


3. Click the **Notifications** tab in this screen



1	Use the Date drop-down boxes to search for notifications sent within a date range
2	The Carer/Client who has submitted the request is displayed under Person
3	The type of request is displayed under Type
4	The date and time the request was sent is displayed under Sent On
5	The details of the request are displayed under Details
6	The status of the request is displayed under Status
7	Use the Branch drop-down box to filter notifications by branch
8	If any filters have been used ensure to hit the Refresh F5 button for the filters to take effect

Double-click on a notification to enter comments, change the status and outcome.



1	The full details of the request are displayed in the Details box
2	Enter a response into the Response box – these comments will display on the Client/Carer Portal to the person who had sent the notification
3	Change the Status of the notification to either Open , Responded or Closed depending on the progress of the request
4	Change the Outcome of the notification to either Approved , Declined or Pending depending on the progress of the request
5	Click Save to save any changes made to the notification

The notification will update instantly in CareFree by populating the **Responded**, **Outcome** and **Response** columns.

Person	Type	Sent on	Details	Status	Responded	Outcome	Response
Chuckle, Pauline (Client)	Client call change	26/11/2018 09:59	Client has requested to cancel the call on 27/11/2018 at 07:00 for the following reason: Daughter will be providing care	Closed	26/11/2018 10:29	Approved	Call cancelled - thank you for informing, you will not be charged for this call.

Please note, the CareFree system will still need be manually updated. Updating the notification will not make the necessary changes within CareFree.