CareFree
Client Portals
Training Guide

Contents

Creation Date	Author	Product & Version	Document Version
05/06/2019	Lyndsay Williamson	Client Portals v2.2	V1

Introduction to Client Portals

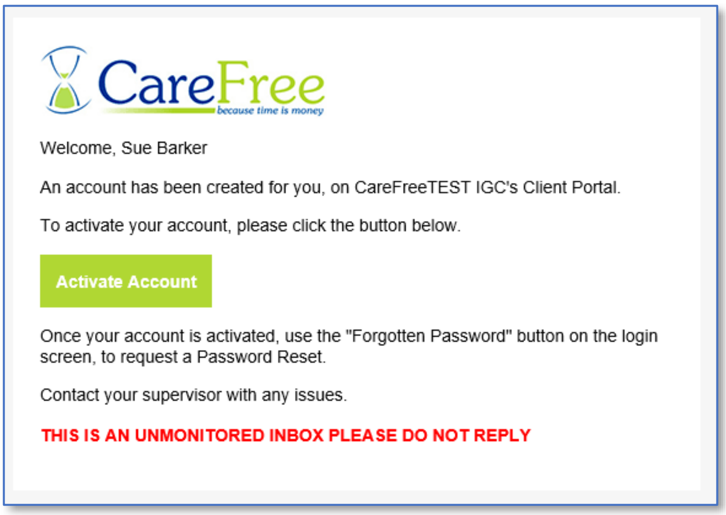
This guide will explain how use the CareFree Portals using a Client / Service Users account.

The Client Portal can be used to:

- View your Calls for Today and Calls throughout the Week
- View Invoices
- View Documentation from the Care Company
- View Important Company Contacts
- Contact the Care Company

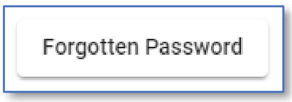
Activating your Account

When your account has been created you will receive an email looking something like the following screen:



Click **Activate Account** on the email to be taken to the Portal website where you can log in.

If you do not have a password to log in with, click **Forgotten Password** to reset your password. See page 5 for more details.



Logging into the Portal

1. Open the link to access the Portal (provided by your Care Company)

> **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 portals from a tablet or mobile phone the screens will differ slightly**

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

3. Click **Login**

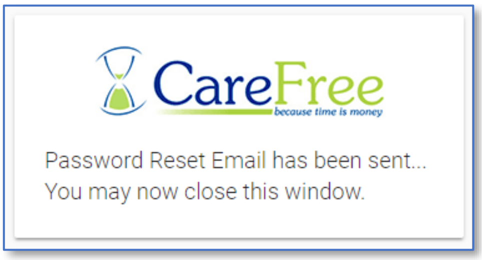
> **When logging in for the first time, your browser may ask if you want to save your credentials. Please ensure the device where your credentials are saved is not shared by another user**

Forgotten Password

Passwords can be reset by the user 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



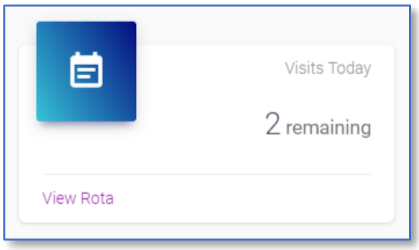
3. The email that is sent will look something similar to the email below

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

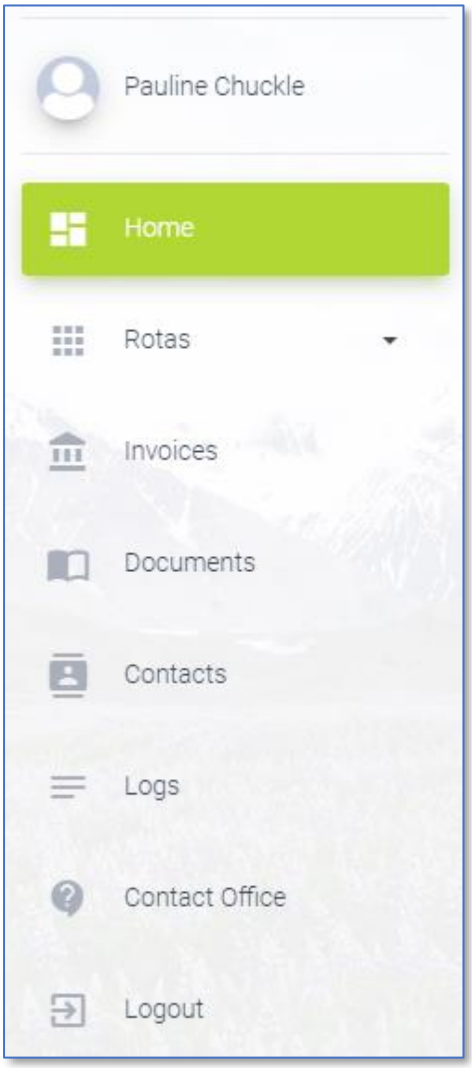
Home Screen Overview

The Home Screen will show a visual of what is outstanding on the rota for today.

By clicking **View Rota** this will open the rota screen to view more details about today's calls.



The left of the Home Screen will show a navigation bar which the next few sections of this training guide will explain.

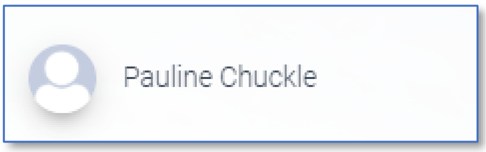


- **Name** – to view/change your profile information click your name here – (Page 7)
- **Home** – to go back to the Home Screen click **Home**
- **Rotas** – to view your Rota, click **Rota** (Page 8)
- **Invoices** – to view your Invoices, click **Invoices** – (Page 15)
- **Documents** – to view documents from the Care Company, click **Documents** – (Page 16)
- **Contacts** – to view the portals contacts, click **Contacts** – (Page 17)
- **Logs** – to view any Contact Logs recorded against your record, click **Log** – (Page 18)
- **Contact Office** – to contact the office, click Contact Office – (Page 19)
- **Logout** – to log out of the portal, click Logout

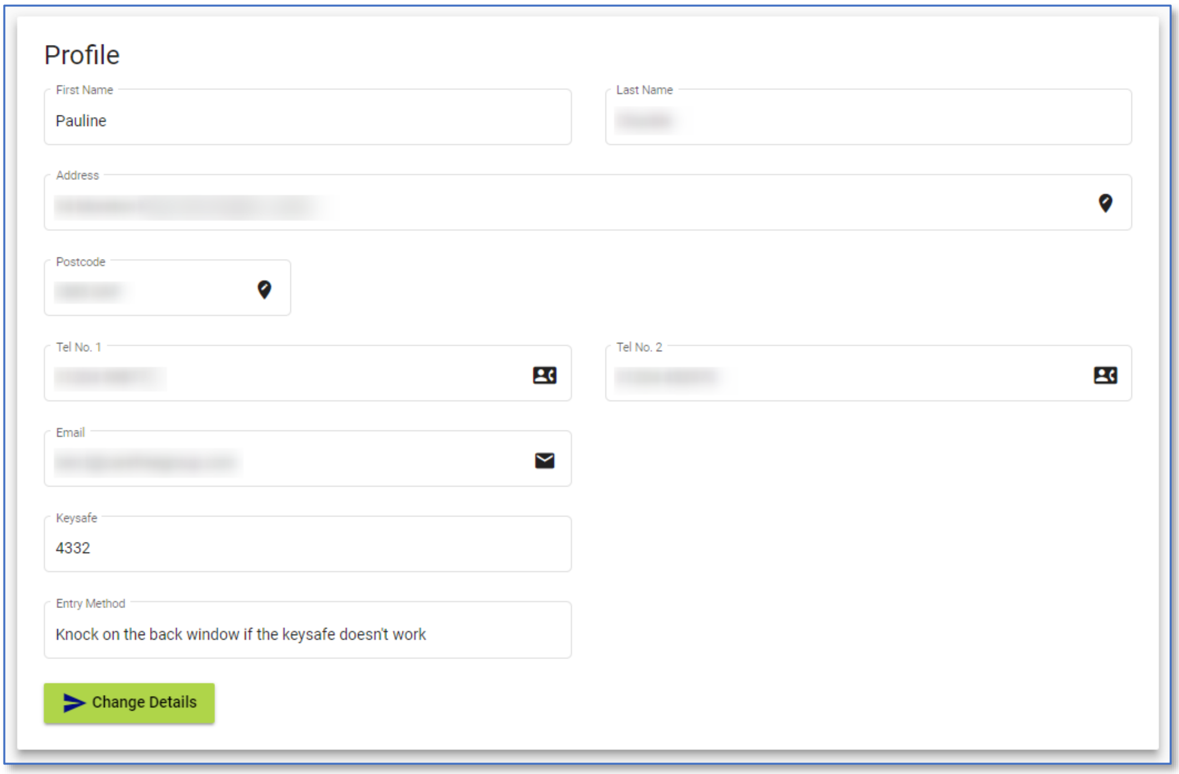
Viewing Your Profile Information

Your Profile details can be viewed from the Portal. A request can be sent to the Care Company to change any information on this screen.

1. From the navigation menu, click your **Name**



2. Your **Name**, **Address**, **Contact Numbers** are displayed on this screen. Your **Email Address**, **KeySafe** and **Entry Method** are also displayed if this additional information is held on record



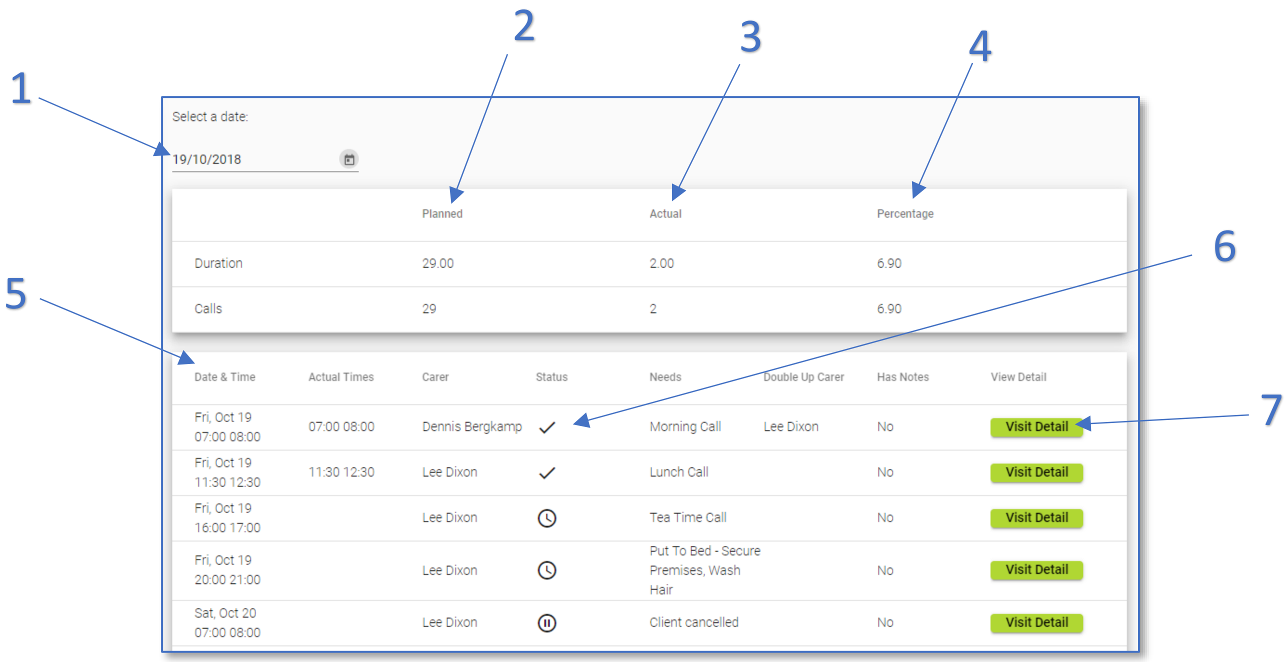
To request any of this information to be changed simply type into the field where the information needs updating, then click **Change Details**.

Rotas & Cancellations

There are two options to choose from when selecting **Rotas** from the navigation menu – **Rotas** and **Cancellations**.

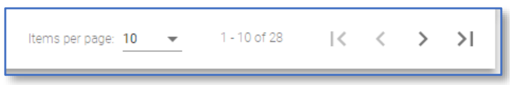
Rotas

1. Click **Rotas** from the navigation menu
2. Click **Rota**



1	Use the **Date Selection** to view the rota from a different date
2	The **Planned** column is the number of Calls with the duration that have been scheduled for the week
3	The **Actual** column is the actual number of Calls with the actual duration of the Call (this information is populated after a Call is completed)
4	A percentage will display once the planned and actual columns are populated – the percentage compares the planned and actual calls/duration
5	Details about each call are displayed here such as the Date, Time, Carer etc.
6	The status of the call is listed under the **Status** column *A Call Status Key is listed at the bottom of the Rota screen, explaining what each Call Status indicates*
7	Click **Visit Detail** to view more details about the Call

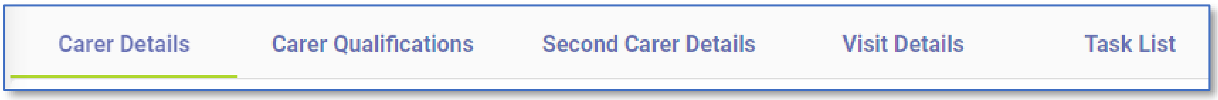
3. At the bottom of the Rota, more calls can be viewed by using the **Items per page** drop-down option or by scrolling through pages by using the arrows



Viewing Visit Details

To open the details of a call, click **Visit Detail** next to a call from the Rota screen.

The headers at the top of the screen will display further details about the call:



Carer Details

The **Carer Details** tab displays details about the Carer you will be expecting to be visited by.

Please Note: Some of the information below may not be displayed, this is dependant on what Portal Options have been configured by your Care Company

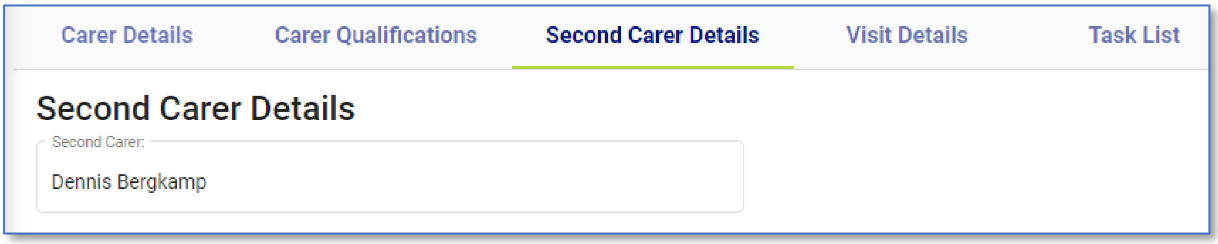
1	The Carers Name is displayed in the **Carer** field
2	The Carers Telephone number is displayed in the **Tel** field
3	A **Photograph** of the Carer may display if one has been uploaded by the Care Company
4	Any Notes that have been entered on the Carers record will display in the **Carer Notes** field

Carer Qualifications

The **Carer Qualifications** tab displays what Qualifications the Carer has along with the date they acquired the Qualification.

Second Carer Details

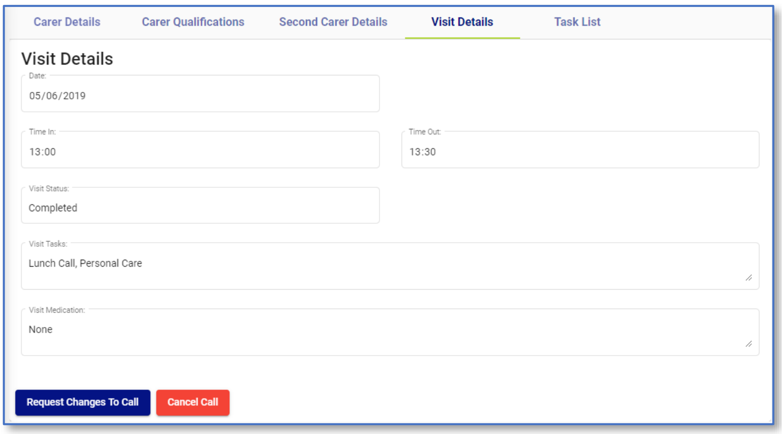
If the Call requires two Carers to visit, the name of the second Carer will display in the **Second Carer Details** tab.



Visit Details

The **Visit Details** tab displays the **Date**, **Start Time**, **End Time**, **Status**, **Tasks** (Needs) and **Medication** in regards to the call.

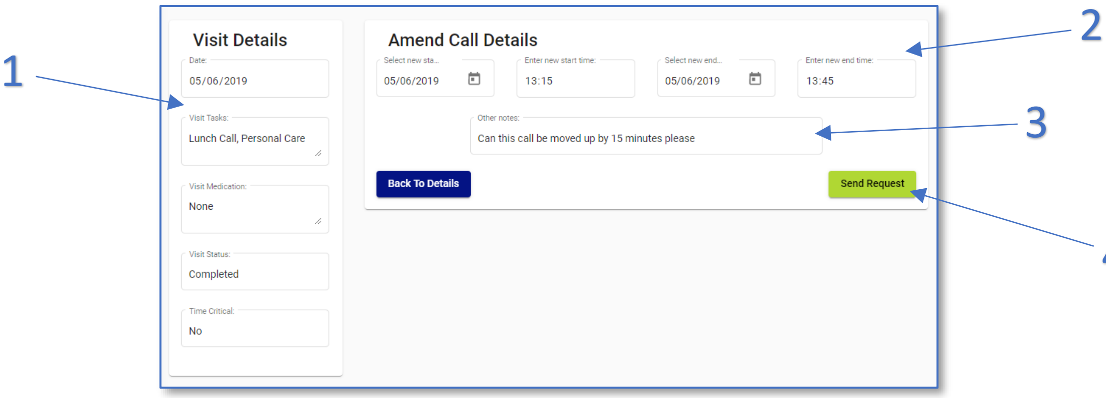
A more detailed list of tasks and medication is displayed in the **Task List**.



Requesting Changes to a Call

You can send a request to your Care Company if you wish to make changes to a Call.

From the **Visit Details** tab, click **Request Changes to Call**.

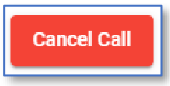


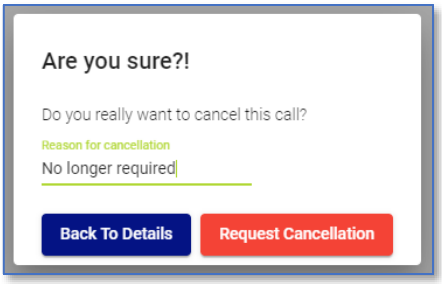
1	**Visit Details** are listed to the left
2	Use the **Date** and **Times** of the fields to enter your preferred date/time of the Call
3	Use the **Other Notes** field to enter in any comments in regards to the request
4	Click **Send Request** to send to your Care Company

Cancelling a Call

You can send a request to your Care Company if you wish to cancel a Call.

From the **Visit Details** tab, click **Cancel Call**.



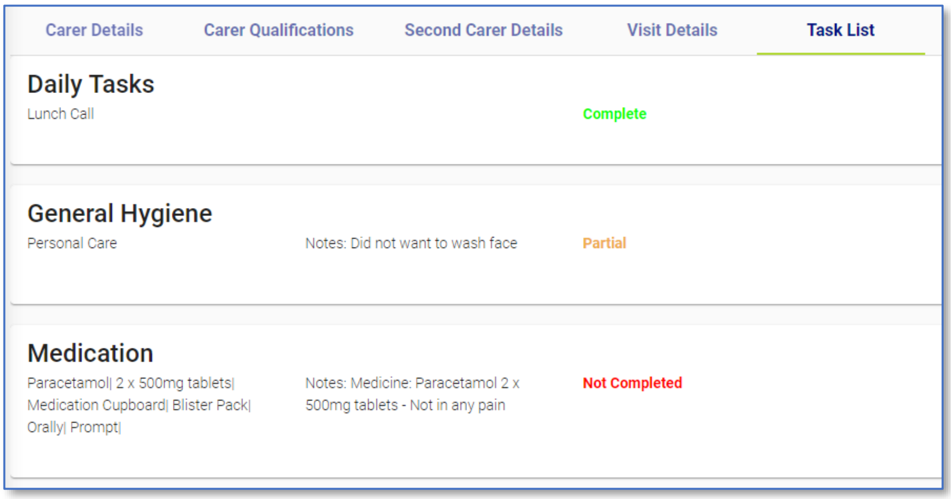


Fill in the **Reason for Cancellation** field, then click **Request Cancellation**.

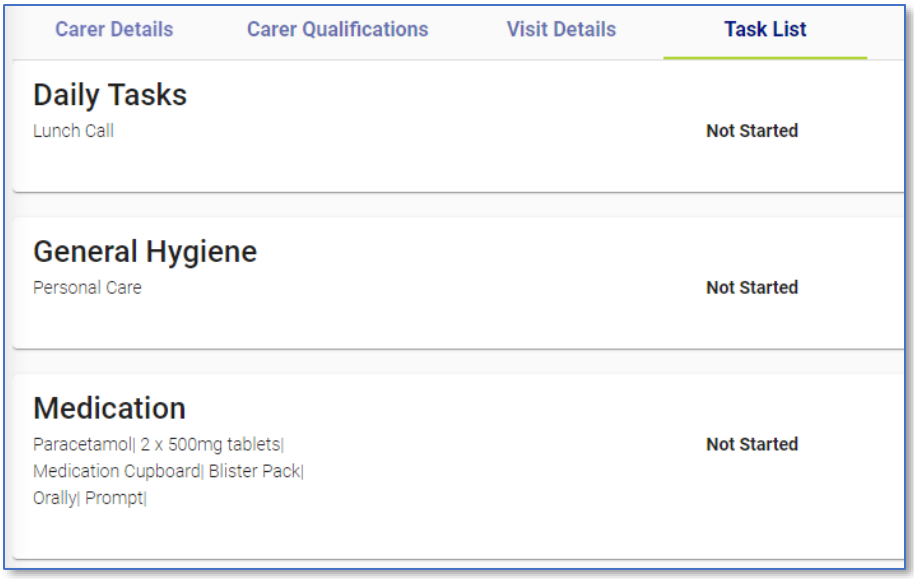
Task List

The **Task List** tab displays the Tasks and Medication required during the visit.

Tasks and Medication will have a status of **Complete**, **Partial** or **Not Completed** once the Carer has entered in Task Management for the visit along with any notes they have entered if the Task/Medication is partial/not completed.

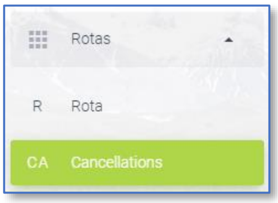


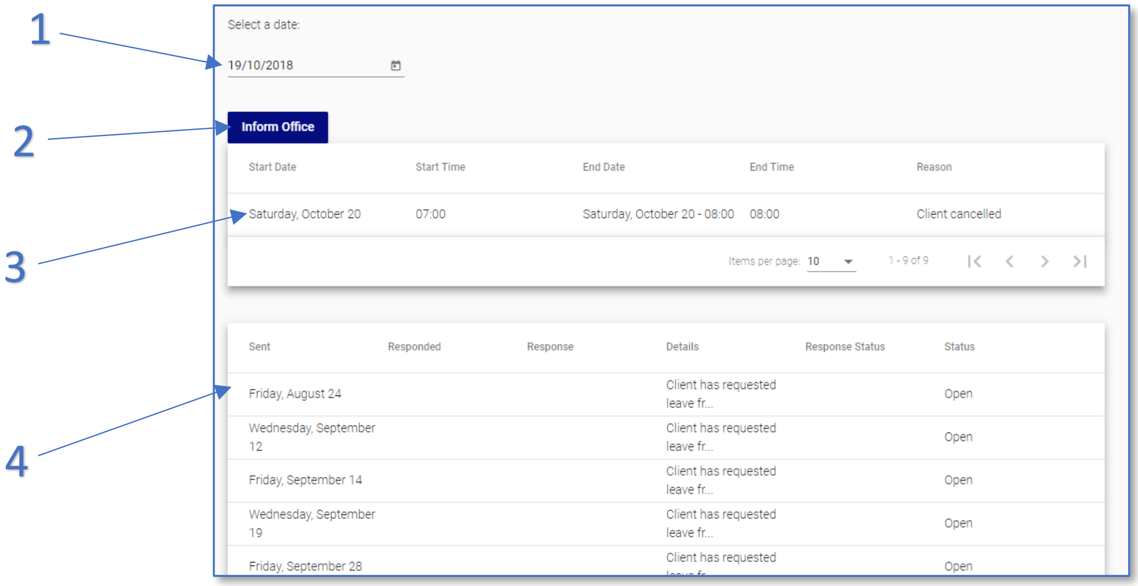
If the Tasks/Medication have not been entered, or you are looking at a Call in the future, the status will display as **Not Started**.



Cancellations

1. Click **Rotas** from the navigation menu
2. Click **Cancellations**

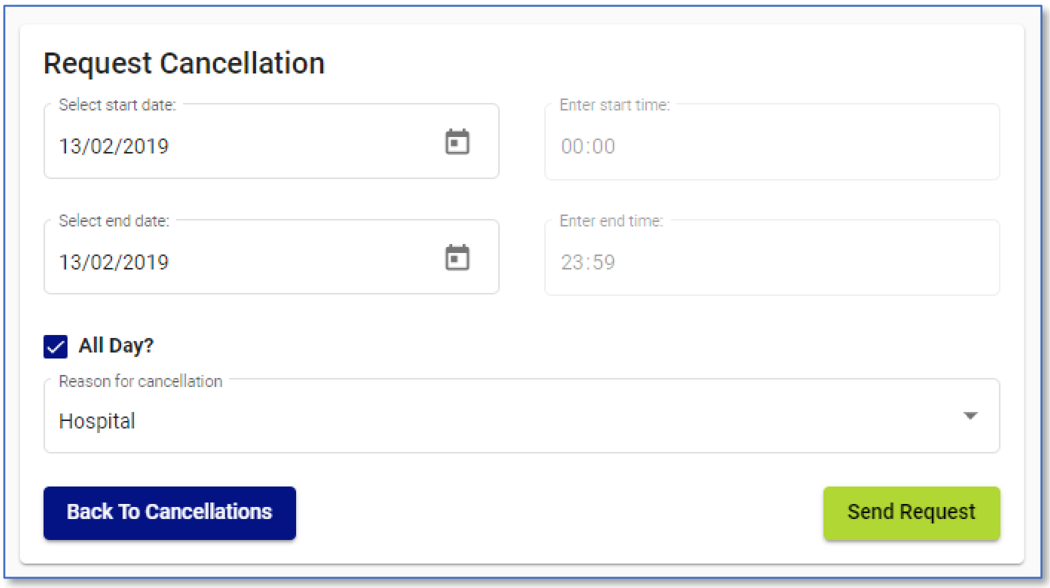




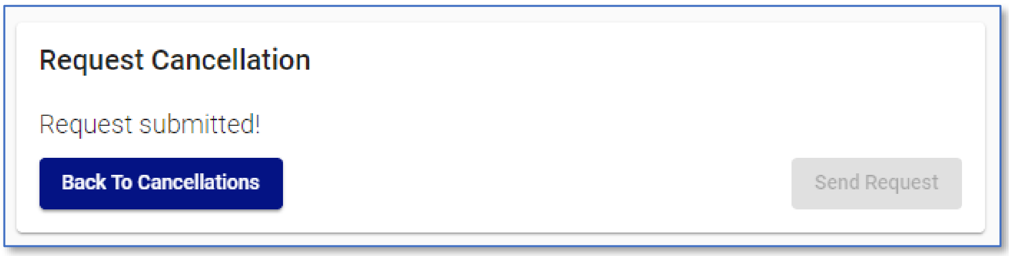
1	Use the **Date Selection** to view cancellations for a different date
2	Click **Inform Office** to inform the office of a cancellation
3	Any approved cancellation will appear here
4	Any requested cancellations will appear here

Informing the Office of a Cancellation

1. From the cancellation screen, click **Inform Office**
2. Enter a **Start Date** and **End Date** for the cancellation
3. Enter a **Start Time** and **End Time** for the cancellation – alternatively press **All Day** if all the calls on these day(s) need cancelling
4. Choose the most appropriate reason for cancelling the call(s) by using the **Reason for Cancellation** drop-down box
5. Click **Send Request** to submit the request to the care company



6. A prompt will appear saying the request has been submitted

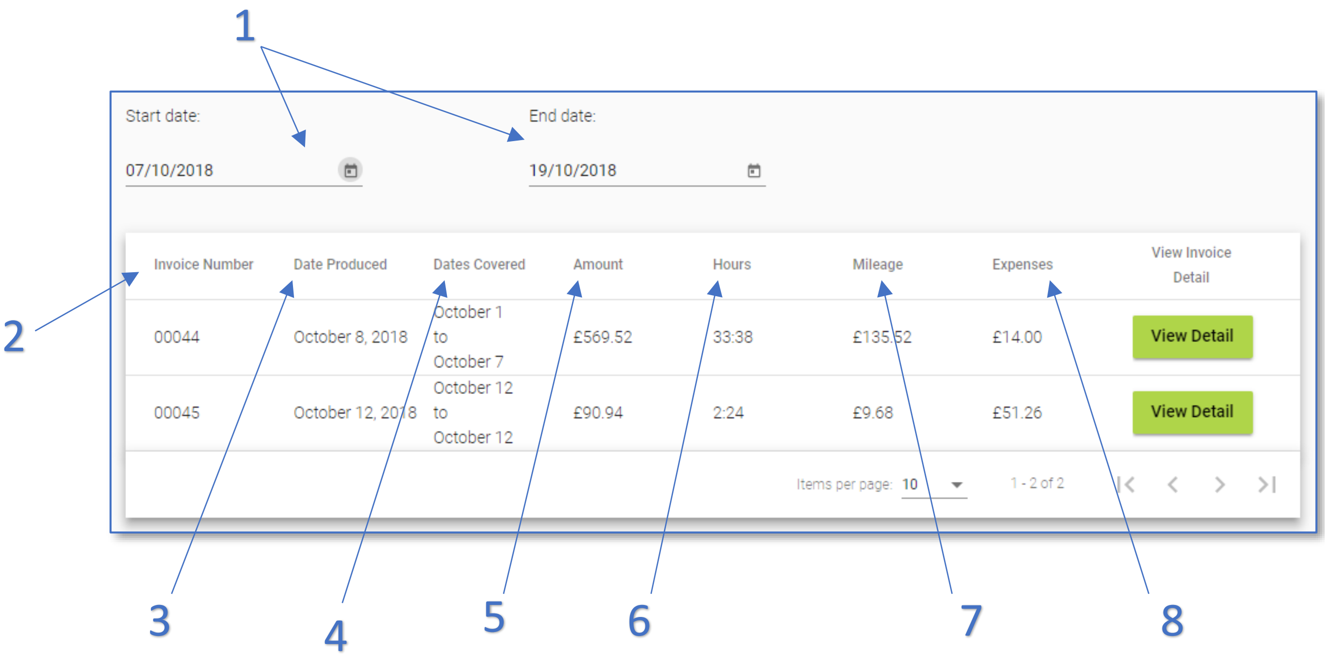


7. Click **Back To Cancellations** – this will load the cancellation screen with the request

Invoices

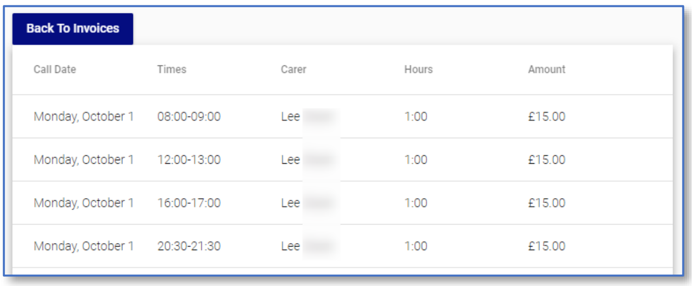
The Invoice summary can be previewed from the portal as well as a breakdown of each Invoice.

1. To open Invoices, click **Invoices** from the navigation menu



1	Use the **Start Date** and **End Date** to search for a date range of Invoices
2	The Invoice number is displayed under **Invoice Number**
3	The date the Invoice was ran on is displayed under **Date Produced**
4	The date the Invoices starts from and end is displayed under **Dates Covered**
5	The amount of the Invoice is displayed under **Amount**
6	The total number of Hours for the Invoice is displayed under **Hours**
7	The amount of Mileage on the Invoice is under **Mileage**
8	The amount of Expenses on the Invoice is under **Expenses**

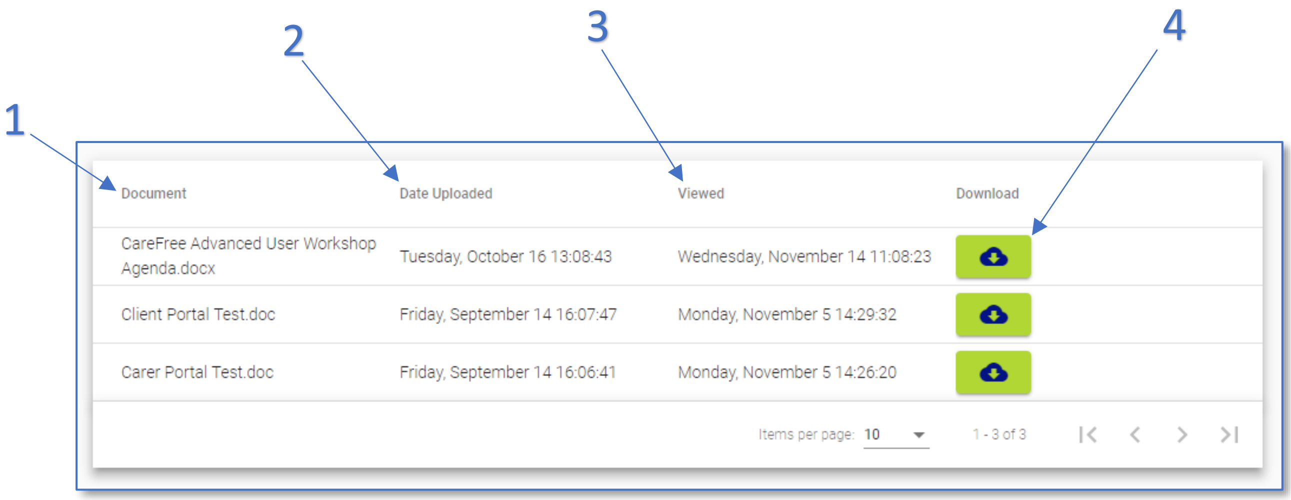
2. Click **View Detail** to see a breakdown of the Invoice
3. Click **Back to Invoices** to go back to the full list of Invoices



Documents

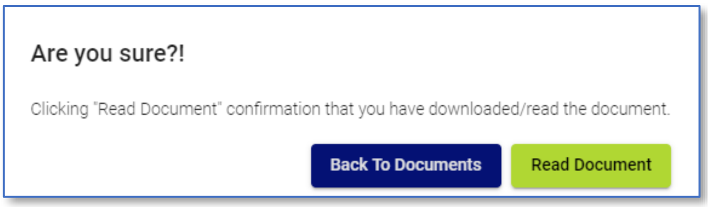
Documents can be loaded onto the Portal by your Care Company and made available for you to read.

Click **Documents** from the navigation menu.



1	The name of the document is listed under **Document**
2	The date the document was uploaded to the Portal is listed under **Date Uploaded**
3	The date the document was last viewed is listed under **Viewed**
4	To view the document, click the  button

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

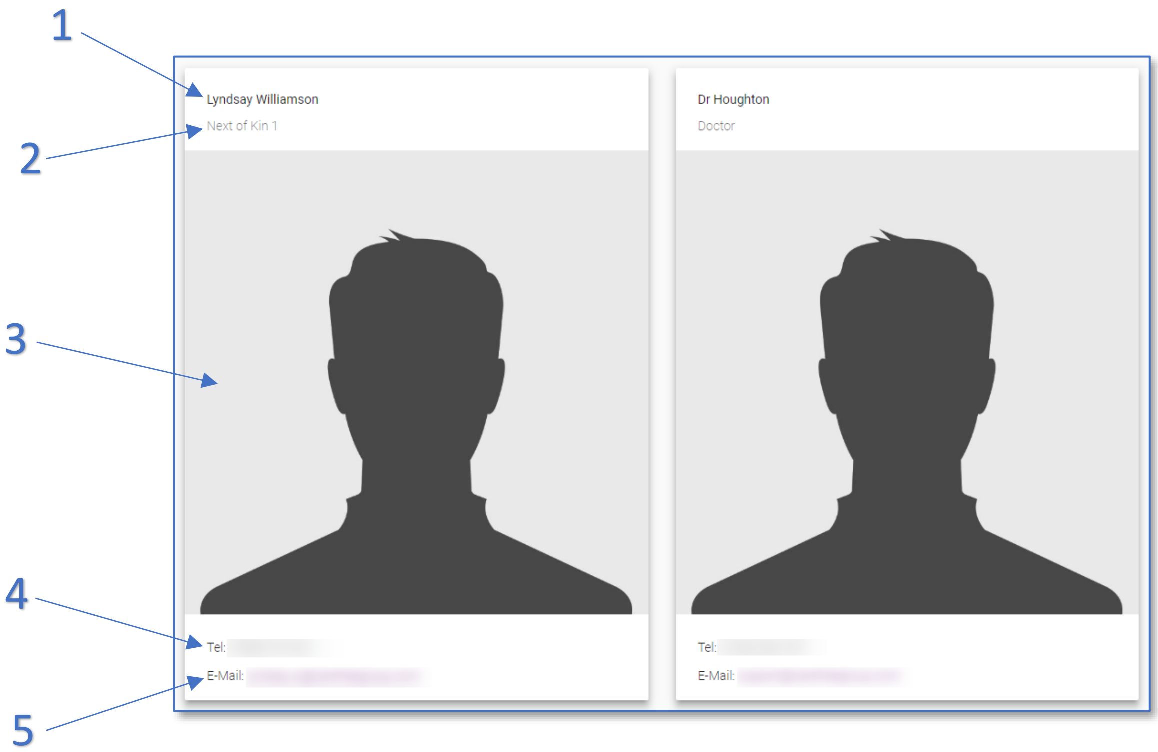


By pressing **Read Document** this will show the Administrators of the Portal that you have read the document. The document will download shortly after.

Contacts

Contacts are created by your Care Company and made available to view from the Contacts screen.

Click **Contacts** from the navigation menu.



1	The **Name** of the Contact is listed here
2	The **Type** of Contact is listed here
3	If there is a **Photograph** of the Contact this will be displayed here
4	The **Telephone Number** of the Contact is listed here
5	If there is an **Email** for the Contact, this will be listed here

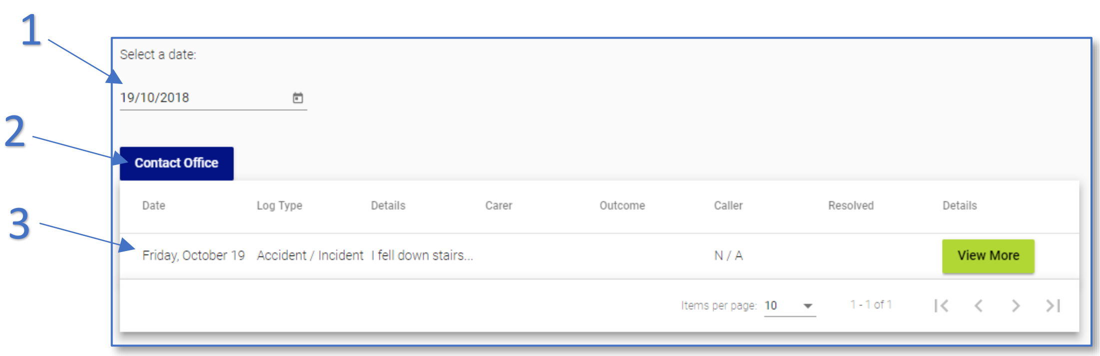
Logs

Logs are Contact Logs that have been logged by the Office Staff against your record. A few example of a Contact Log is:

- Accident or Incidents
- Call Cancellations
- Changes in Call Packages

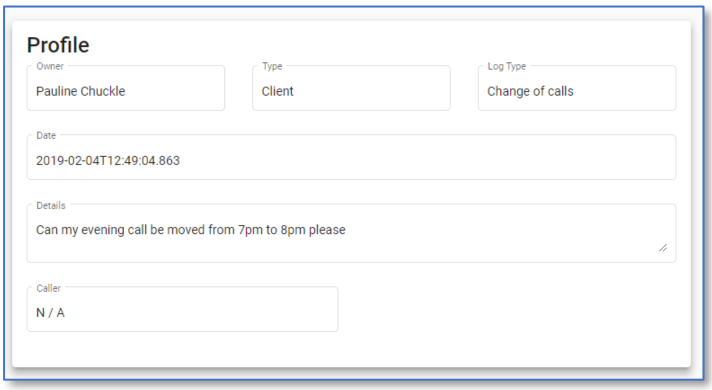
If a Log is created from the Portal it can also be viewed from this screen.

1. From the navigation menu, click **Logs**



1	Use the **Date Selection** to view logs from a different date
2	Click **Contact Office** to create a new log
3	Existing logs can be viewed here

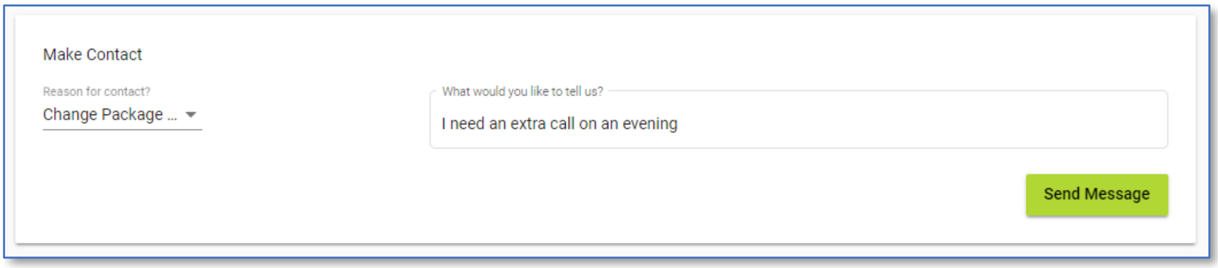
2. Click **View More** to view more details about a log
3. All relevant information about the log will be displayed



Contact Office

You can create a Contact Log from the Portal by using the **Contact Office** button. This button can be found either from the **Log** screen or using the **Contact Office** button from the navigation screen.

1. Click **Contact Office** (either from the navigation menu or via the log screen)



2. Use the **Reason for Contact** drop-down box and select the most appropriate option
3. Use the free text field to enter your comments
4. Click **Send Message**
5. The Log screen will appear with the most reason log at the top of the screen