

CareFree Client Portals Training Guide



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Introduction to Client Portals

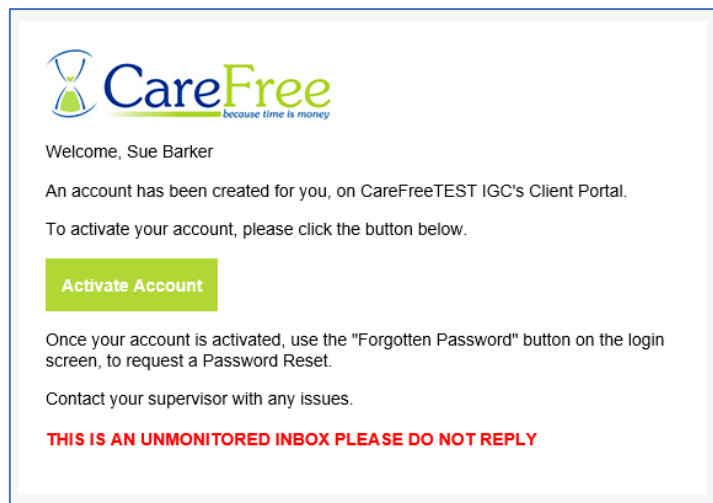
This guide will explain how use the CareFree Portals using a Client / Service Users account.

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

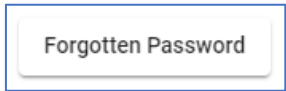
Activating your Account

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**.

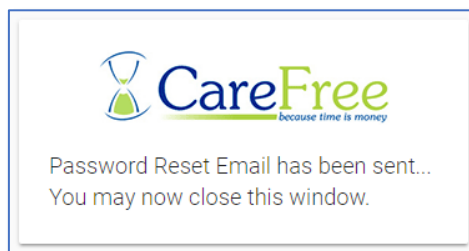
Forgotten Password

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



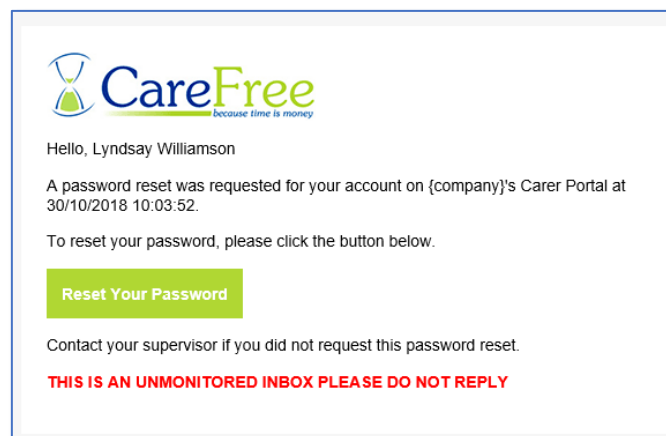
The screenshot shows the CareFree login interface. At the top is the CareFree logo with the tagline "because time is money". Below the logo is a text input field labeled "Email address *" containing the email "lyndsay.w@carefreegroup.com". A green "Request Reset" button is positioned below the input field.

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



The screenshot shows a confirmation message from CareFree. It features the CareFree logo at the top, followed by the text: "Password Reset Email has been sent... You may now close this window."

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



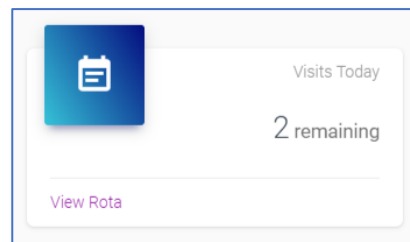
The screenshot shows the content of a password reset email. It starts with the CareFree logo. The text reads: "Hello, Lyndsay Williamson", "A password reset was requested for your account on {company}'s Carer Portal at 30/10/2018 10:03:52.", and "To reset your password, please click the button below." Below this is a green button labeled "Reset Your Password". The email concludes with "Contact your supervisor if you did not request this password reset." and a red warning: "THIS IS AN UNMONITORED INBOX PLEASE DO NOT REPLY".

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

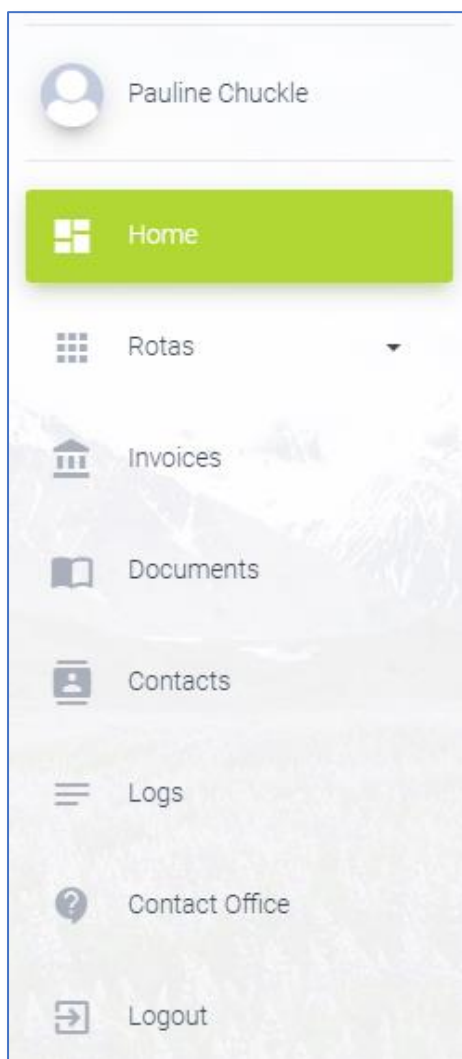
Home Screen Overview

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**

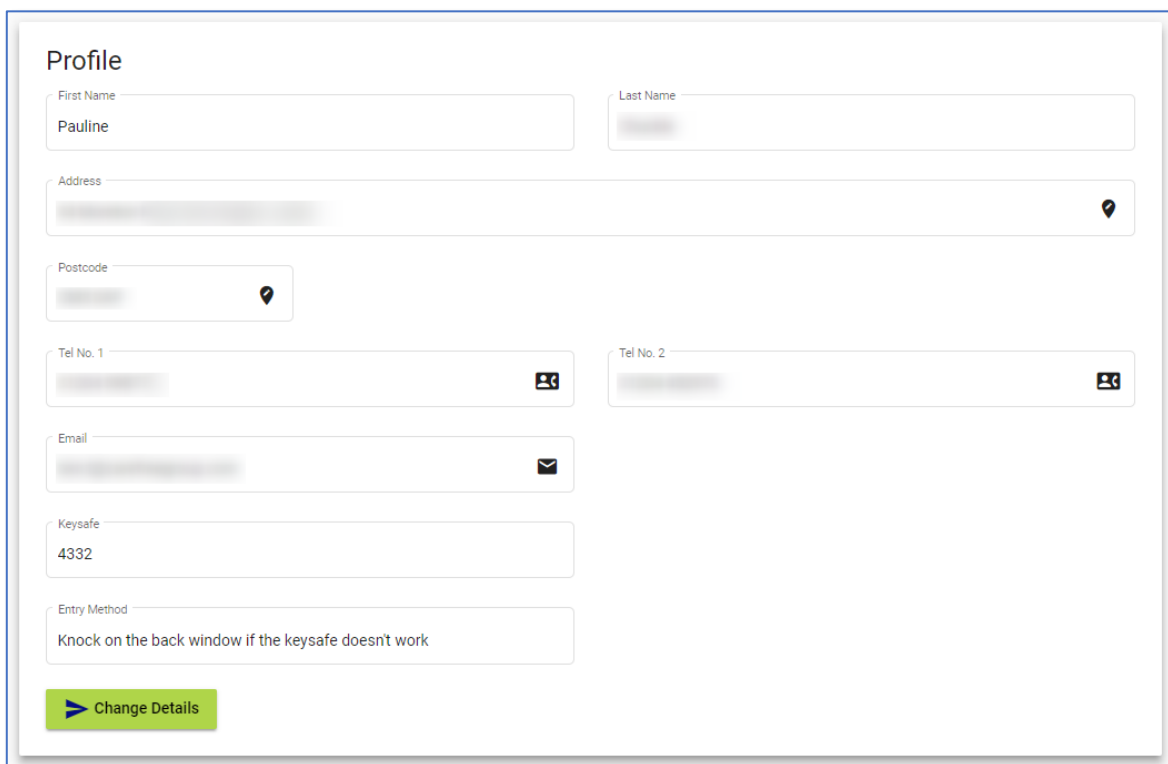
Viewing Your Profile Information

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

A screenshot of a web form titled "Profile". The form contains several input fields: "First Name" (containing "Pauline"), "Last Name" (blurred), "Address" (blurred with a location pin icon), "Postcode" (blurred with a location pin icon), "Tel No. 1" (blurred with a phone icon), "Tel No. 2" (blurred with a phone icon), "Email" (blurred with an envelope icon), "Keysafe" (containing "4332"), and "Entry Method" (containing "Knock on the back window if the keysafe doesn't work"). At the bottom left is a green button with a right-pointing arrow and the text "Change Details".

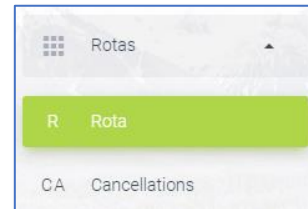
To request any of this information to be changed simply type into the field where the information needs updating, then click **Change Details**.

Rotas & Cancellations

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

Rotas

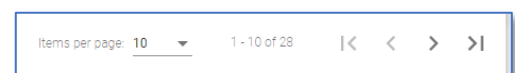
1. Click **Rotas** from the navigation menu
2. Click **Rota**



A screenshot of the Rota screen. At the top, there is a date selection field labeled 'Select a date:' with the date '19/10/2018' and a calendar icon. Below this is a summary table with columns 'Planned', 'Actual', and 'Percentage'. The 'Planned' column shows 'Duration: 29.00' and 'Calls: 29'. The 'Actual' column shows 'Duration: 2.00' and 'Calls: 2'. The 'Percentage' column shows '6.90'. Below the summary table is a list of individual calls with columns: 'Date & Time', 'Actual Times', 'Carer', 'Status', 'Needs', 'Double Up Carer', 'Has Notes', and 'View Detail'. The first call is on 'Fri, Oct 19' from '07:00 08:00' by 'Dennis Bergkamp' with a checkmark status, 'Morning Call' needs, 'Lee Dixon' as the carer, and 'No' notes. A 'Visit Detail' button is next to it. The last call is on 'Sat, Oct 20' from '07:00 08:00' by 'Lee Dixon' with a 'Client cancelled' status and 'No' notes. A 'Visit Detail' button is also present. Numbered callouts 1-7 point to various elements: 1 to the date selector, 2 to the Planned column, 3 to the Actual column, 4 to the Percentage column, 5 to the call list header, 6 to the Status column, and 7 to a 'Visit Detail' button.

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 <i>A Call Status Key is listed at the bottom of the Rota screen, explaining what each Call Status indicates</i>
7	Click Visit Detail to view more details about the Call

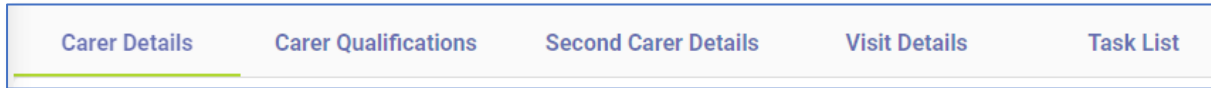
3. At the bottom of the Rota, more calls can be viewed by using the **Items per page** drop-down option or by scrolling through pages by using the arrows



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.

Carer Details	Carer Qualifications	Second Carer Details	Visit Details	Task List
	Manual Handling		Feb 1, 2015	
	Dementia Awareness		Aug 10, 2016	
	Medication		Apr 7, 2017	
	Dementia Awareness		Apr 7, 2017	
	Diabetes In Health Care		Apr 7, 2017	

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.

Carer Details	Carer Qualifications	Second Carer Details	Visit Details	Task List
<h3>Second Carer Details</h3> <p>Second Carer:</p> <input type="text" value="Dennis Bergkamp"/>				

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**.

Carer Details	Carer Qualifications	Second Carer Details	Visit Details	Task List
<h3>Visit Details</h3> <p>Date: <input type="text" value="05/06/2019"/></p> <p>Time In: <input type="text" value="13:00"/> Time Out: <input type="text" value="13:30"/></p> <p>Visit Status: <input type="text" value="Completed"/></p> <p>Visit Tasks: <input type="text" value="Lunch Call, Personal Care"/></p> <p>Visit Medication: <input type="text" value="None"/></p> <p><input type="button" value="Request Changes To Call"/> <input type="button" value="Cancel Call"/></p>				

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**.

Request Changes To Call

The screenshot shows a web interface for amending a call. On the left, under 'Visit Details', there are fields for Date (05/06/2019), Visit Tasks (Lunch Call, Personal Care), Visit Medication (None), Visit Status (Completed), and Time Critical (No). On the right, under 'Amend Call Details', there are fields for 'Select new sta.' (05/06/2019), 'Enter new start time' (13:15), 'Select new end.' (05/06/2019), and 'Enter new end time' (13:45). Below these is an 'Other notes' field containing the text 'Can this call be moved up by 15 minutes please'. At the bottom of the 'Amend Call Details' section are two buttons: 'Back To Details' and 'Send Request'. Four blue arrows with numbers 1 through 4 point to the 'Visit Details' section, the date and time fields, the 'Other notes' field, and the 'Send Request' button respectively.

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**.

Cancel Call

The screenshot shows a confirmation dialog box with the title 'Are you sure?!'. Below the title is the question 'Do you really want to cancel this call?'. There is a green label 'Reason for cancellation' followed by a text input field containing the text 'No longer required'. At the bottom of the dialog are two buttons: 'Back To Details' and 'Request Cancellation'.

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.

Carer Details	Carer Qualifications	Second Carer Details	Visit Details	Task List
Daily Tasks				
Lunch Call				Complete
General Hygiene				
Personal Care				Notes: Did not want to wash face Partial
Medication				
Paracetamol 2 x 500mg tablets Medication Cupboard Blister Pack Orally Prompt				Notes: Medicine: Paracetamol 2 x 500mg tablets - Not in any pain 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**.

Carer Details	Carer Qualifications	Visit Details	Task List
Daily Tasks			
Lunch Call			Not Started
General Hygiene			
Personal Care			Not Started
Medication			
Paracetamol 2 x 500mg tablets Medication Cupboard Blister Pack Orally Prompt			Not Started

Cancellations

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

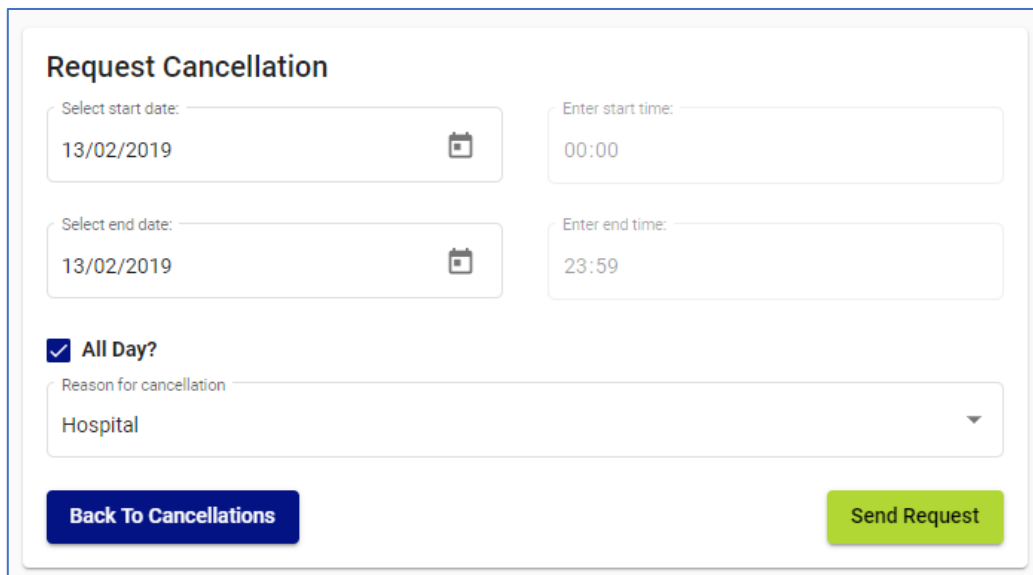


A screenshot of the 'Cancellations' page. The page has a date selection field at the top set to '19/10/2018'. Below this is a blue button labeled 'Inform Office'. Underneath is a table with columns: Start Date, Start Time, End Date, End Time, and Reason. The first row shows a cancellation for Saturday, October 20, from 07:00 to 08:00, with the reason 'Client cancelled'. Below this table is a pagination control showing 'Items per page: 10' and '1 - 9 of 9'. At the bottom of the page is another table with columns: Sent, Responded, Response, Details, Response Status, and Status. The first row shows a cancellation request sent on Friday, August 24, with a status of 'Open'. The other rows show similar requests from September 12, 14, 19, and 28, all with a status of 'Open'. Blue arrows with numbers 1 through 4 point to the date selection field, the 'Inform Office' button, the cancellation table, and the request table respectively.

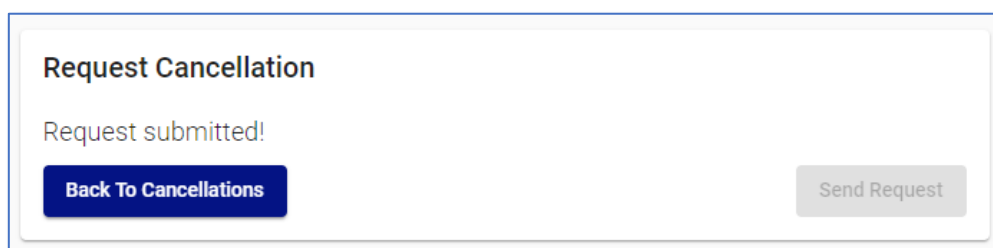
1	Use the Date Selection to view cancellations for a different date
2	Click Inform Office to inform the office of a cancellation
3	Any approved cancellation will appear here
4	Any requested cancellations will appear here

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

A screenshot of a web form titled "Request Cancellation". It contains several input fields: "Select start date:" with a date picker showing "13/02/2019"; "Enter start time:" with a time picker showing "00:00"; "Select end date:" with a date picker showing "13/02/2019"; "Enter end time:" with a time picker showing "23:59". There is a checked checkbox labeled "All Day?". Below that is a dropdown menu for "Reason for cancellation" with "Hospital" selected. At the bottom, there are two buttons: "Back To Cancellations" (blue) and "Send Request" (green).

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

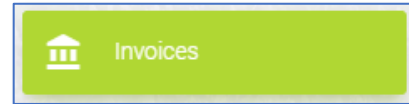
A screenshot of a confirmation screen titled "Request Cancellation". It displays the message "Request submitted!". At the bottom, there are two buttons: "Back To Cancellations" (blue) and "Send Request" (greyed out).

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

2

3

4

5

6

7

8

Invoice Number	Date Produced	Dates Covered	Amount	Hours	Mileage	Expenses	View Invoice Detail
00044	October 8, 2018	October 1 to October 7	£569.52	33:38	£135.52	£14.00	View Detail
00045	October 12, 2018	October 12 to October 12	£90.94	2:24	£9.68	£51.26	View Detail

Items per page: 10 1 - 2 of 2

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

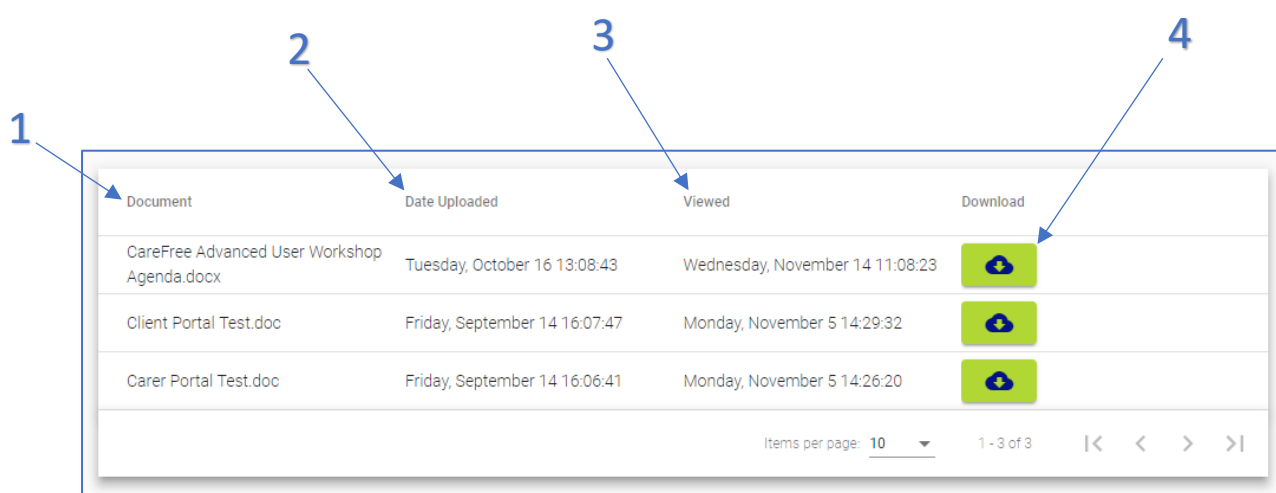
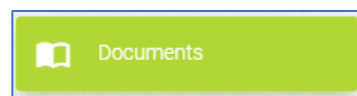
[Back To Invoices](#)


Call Date	Times	Carer	Hours	Amount
Monday, October 1	08:00-09:00	Lee	1:00	£15.00
Monday, October 1	12:00-13:00	Lee	1:00	£15.00
Monday, October 1	16:00-17:00	Lee	1:00	£15.00
Monday, October 1	20:30-21:30	Lee	1:00	£15.00

Documents

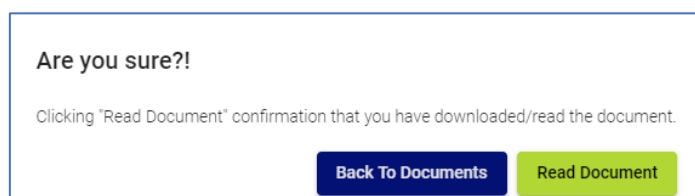
Documents can be loaded onto the Portal by your Care Company and made available for you to read.

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.

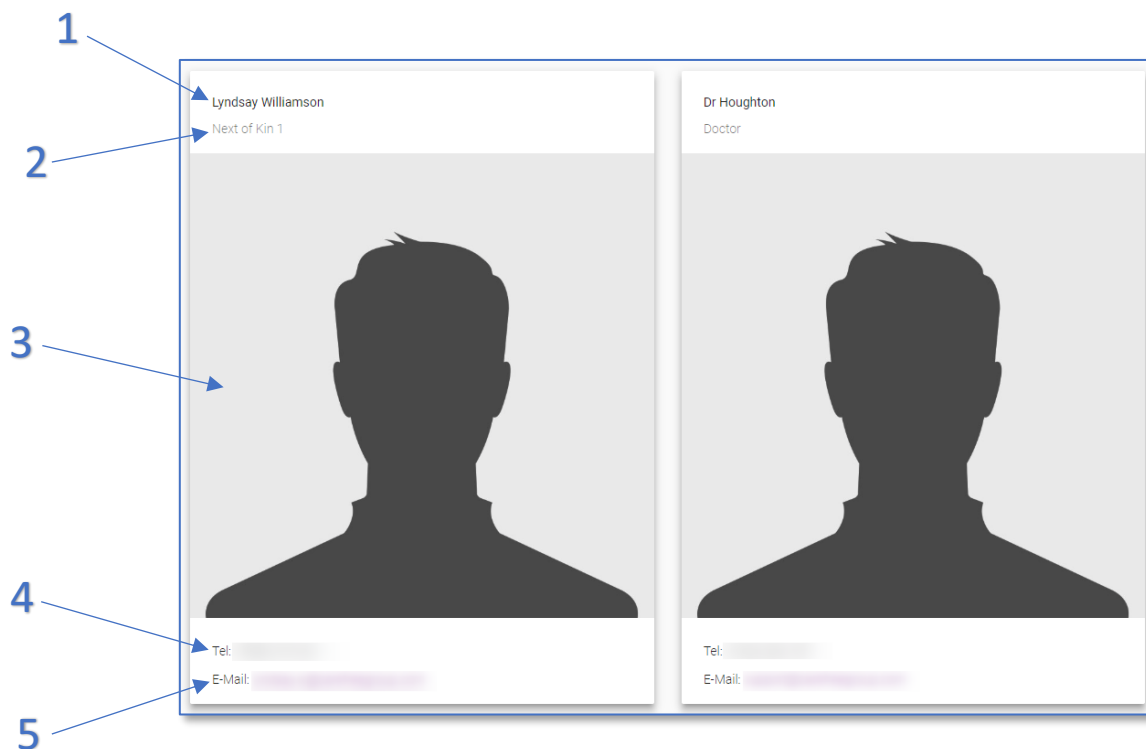
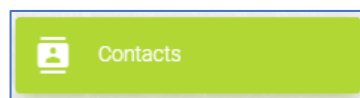


By pressing **Read Document** this will show the Administrators of the Portal that you have read the document. The document will download shortly after.

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

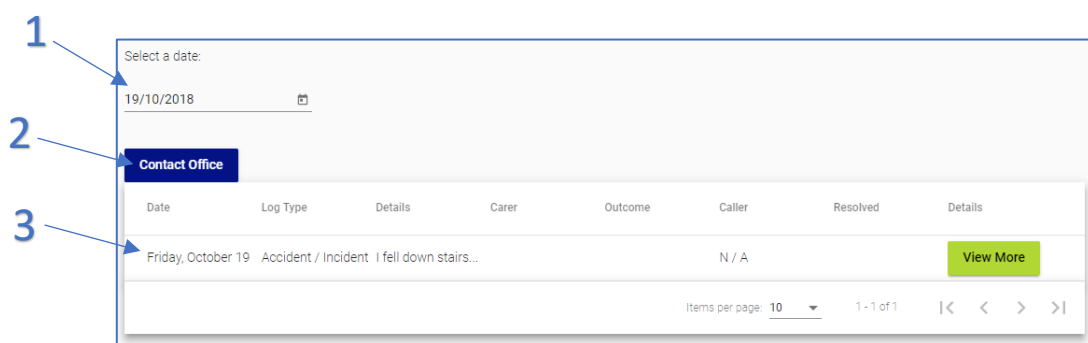
Logs

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

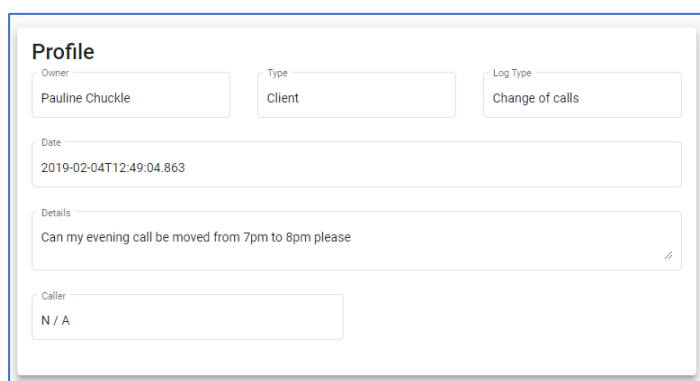
If a Log is created from the Portal it can also be viewed from this screen.

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

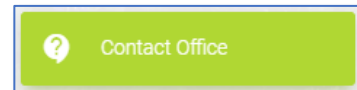
2. Click **View More** to view more details about a log
3. All relevant information about the log will be displayed



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)



Make Contact

Reason for contact?
Change Package ... ▾

What would you like to tell us?
I need an extra call on an evening

Send Message

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

Date	Log Type	Details	Carer	Outcome	Caller	Resolved	Details
Friday, October 19	Change Package of care	I need an extra call on an ev...			N / A		View More