



# CareFree v5.5.7

## Training Guide



# Contents

The guide will cover changed from CareFree version 5.4.13 to version 5.5.7.

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07/11/2018	Lyndsay Williamson	CareFree 5.5.7	V5

# Getting Started

Before reading this guide please note that certain parts of the system have been updated for new functionality that your company may not have access to. The new functionality in question is called the CareFree Outcomes System (COS) which will manage client outcomes and task management i.e. tasks and medication – we envisage that COS will be available early 2019.

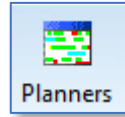
Please note that certain parts of the system will link with RoadRunner, which your company may also not have access to. If your company uses RoadRunner and you are interested in the new functionality it is highly likely that your RoadRunner application will need updating.

For more information about the new COS functionality or an upgrade for RoadRunner please contact your account manager.

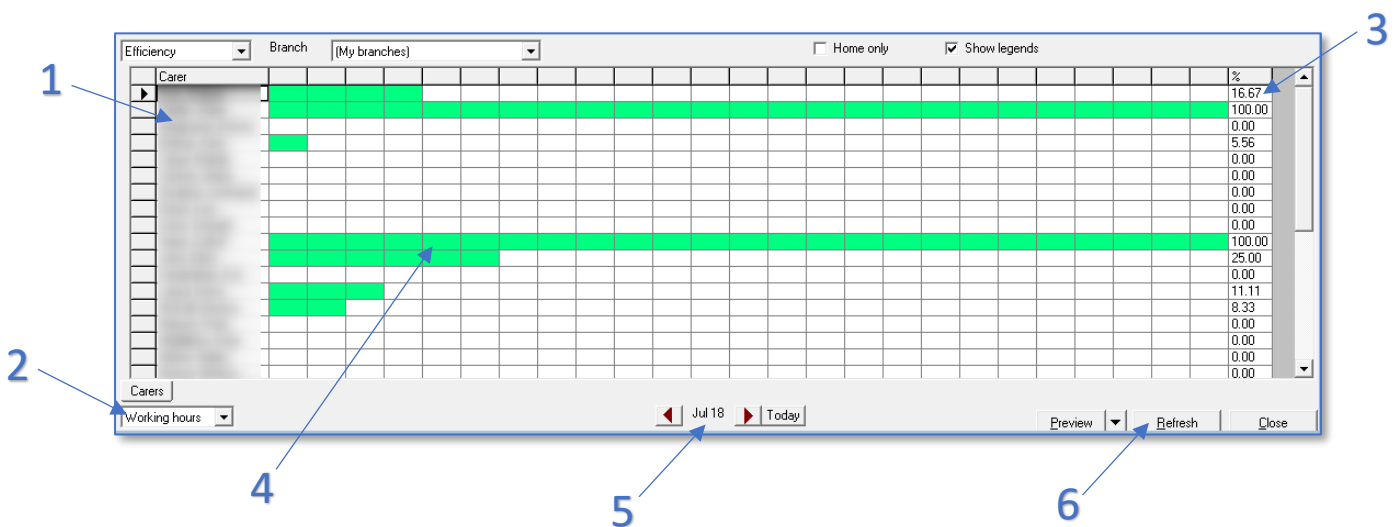
Please note, there are a number of version updates combined in this training guide so there may be updates/changes that you already have been using.

# Efficiency Planner

The Efficiency Planner will show the efficiency of the Carer's allocations compared to the time they are available to work, or their day from start to finish, as a percentage.



1. Click on the **Planners** icon
2. Select **Efficiency** using the drop-down menu in the top left corner of the screen



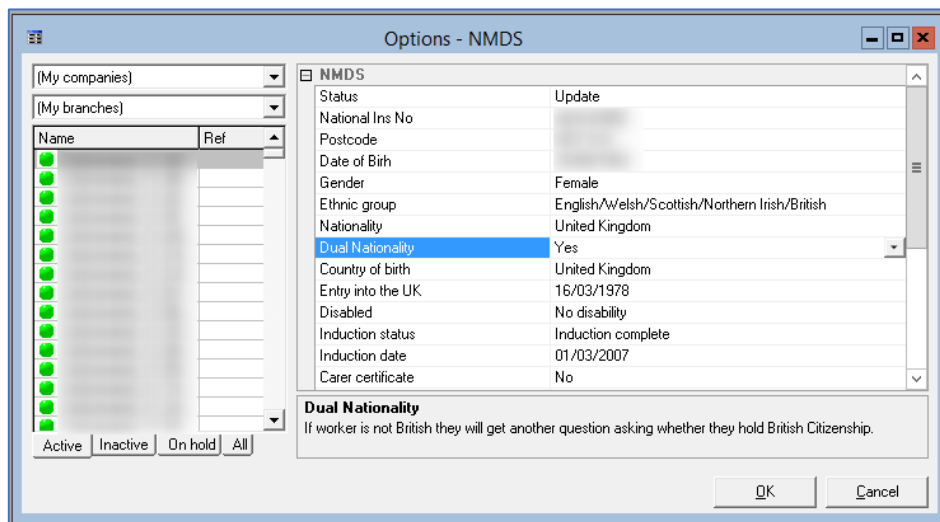
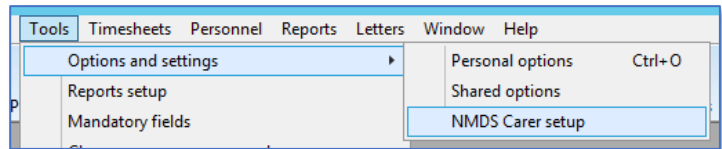
1	Carers are displayed to the left
2	Use the drop-down menu to choose either <b>Working Hours</b> or <b>Start-Finish</b>  The Working Hours option will look at the Carers efficiency based on what working hours have been entered against what calls have been allocated to the Carer  The Start-Finish option will look at the Carers efficiency based on their shift (the allocations of calls between their first and last call)
3	The percentage of efficiency is displayed at the end of each Carers row
4	A green bar will indicate the Carers efficiency visually
5	Select the date you wish to view data for
6	Click <b>Refresh</b> to update the Planner screen

# NMDS

## NMDS Changes

A dual nationality field has been added to the NMDS Carer Setup screen.

1. Go to **Tools**
2. Go to **Options & Settings**
3. Click **NMDS Carer setup**
4. There is an extra field in the NMDS screen named **Dual Nationality**

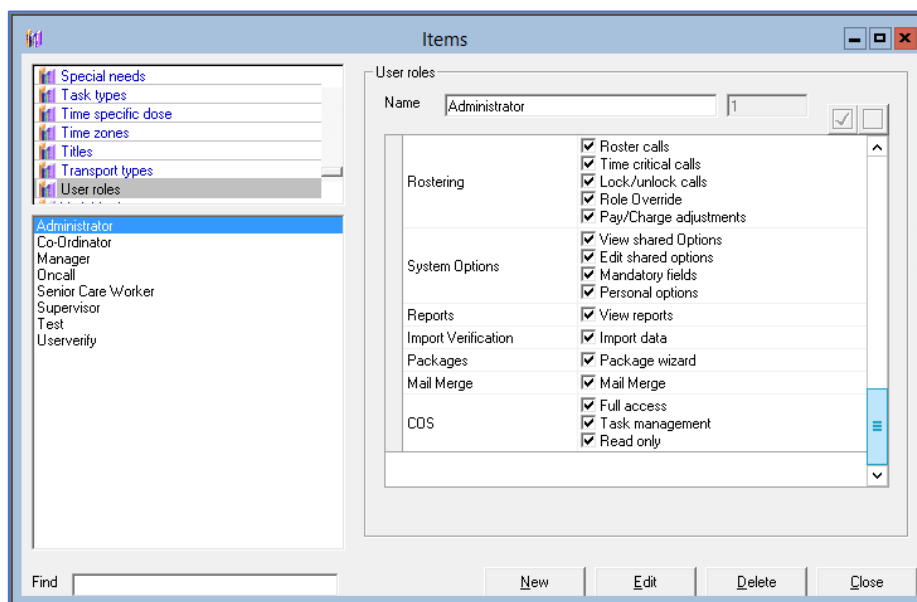


5. This option can be set **Not Known, Yes** or **No**
6. Click **OK** to save

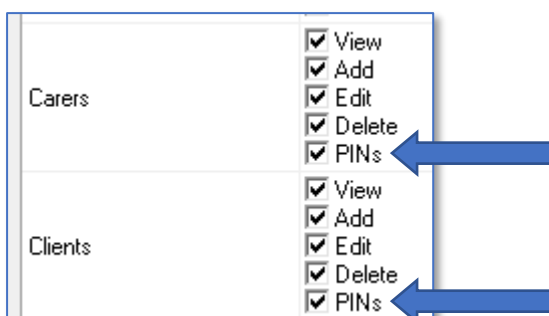
# User Role Restrictions

A new section in the user roles restrictions has been added to CareFree for COS – the CareFree Outcomes System and is a new piece of functionality produced by CareFree. For more information about COS please contact your account manager.

1. Go to **Items**
2. Go to **User Roles**
3. To the right there is a list of restrictions in CareFree, scroll to the bottom to view the **COS** section



Another restriction has been added to the user role is the ability to enable/disable editing of Client and Carer PINs for ECM.

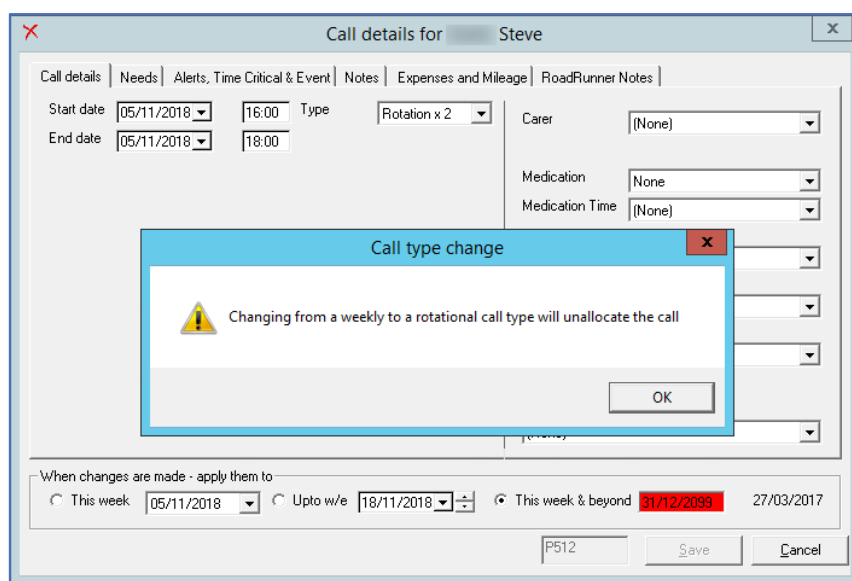


# Rotas

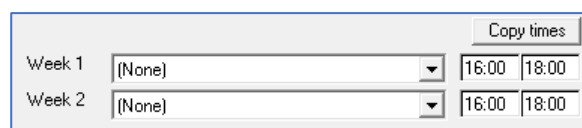
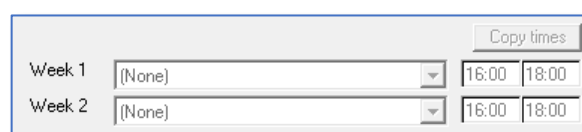
## Call Types

Call types can be changed from a weekly call to a rotational call and vice versa. In this example we will be changing a call from Weekly to Rotation x2.

1. Double-click the call
2. Use the **Type** drop-down box to change the call type



3. A prompt will display stating that the call will become unallocated by changing the call type
4. Click **OK** to this prompt
5. The number of rotational weeks will then appear on the call which will be greyed out
6. **Save** the call to change the foundations of the call from weekly to rotational
7. Re-open the call where the rotational week drop-down boxes will be available to use



## Pencilled-in Carers

It is possible to pencil in Carers to cover calls from within the unallocated screen. Once a Carer has been pencilled in, users will need to either confirm the allocation in the rota screen, or select a different Carer using the unallocated screen.

1. Open the **Unallocated** screen
2. Locate the call you wish to pencil in a Carer for
3. Click into the **Pencilled in / Auto** column then use the drop-down arrow to select the Carer

	Date	Time in	Time out	Carer	Client	Run	Need	Pencilled In / Auto	Postcode	Driver
	11/07	00:00	08:00				24/7 Live-In			Yes
	11/07	08:00	20:00				24/7 Live-In			Yes
	11/07	08:30	14:30				Basic			Yes
	11/07	09:00	10:00			Morning Run	Morning Call - Get U			Yes

4. Select a Carer from the list displayed, click **Allocate**

8. This will not allocate the call to the Carer but will pencil them into the call ready for confirmation

Date	Time in	Time out	Carer	Client	Run	Need	Pencilled In /	Postcode	x2	Driver
07/11	00:00	23:59				Personal Care	Laura			Yes
07/11	05:00	06:00				Morning Call - Get				Yes



## Confirming a Pencilled-in Carer

Once a Carer has been pencilled into a call they are then confirmed from the rota.

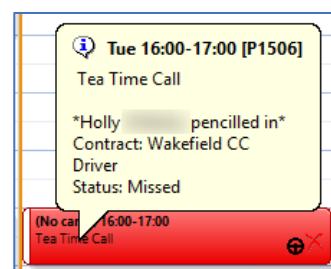
1. Open the **Rota** screen
2. Go to the **Pencilled In** tab

The screenshot shows a software interface for managing a rota. At the top, there are filters for '(My branches)', 'Home', and the date '05/11/2018 Mon'. Below this is a table with columns: Day of week, Date, Calls, Date, Time in, Time out, Original Carer, Pencilled-in Carer, Client, and Service. The table lists calls for the week of 05/11/2018. A 'Pencilled In' tab is selected, showing a red bar with the text 'Changes will be from 05/11/2018 & beyond'. At the bottom, there are buttons for 'Confirm', 'Refresh', 'Preview', and 'Close'.

Day of week	Date	Calls	Date	Time in	Time out	Original Carer	Pencilled-in Carer	Client	Service
Monday	05/11/2018	10	05/11	10:00	10:30		5.5.7 Carer, 5.5.7	Chuckle, Barry	Personal Care
Tuesday	06/11/2018	0	05/11	06:00	08:00	Carey, Manah	Smith, Jada - Pinkel		Morning Call - Get Up ...
Wednesday	07/11/2018	1	05/11	10:00	11:00	5.5.7 Carer, 5.5.7	Williamson, George		Morning Call - Get Up ...
Thursday	08/11/2018	0	05/11	10:00	12:00	Smith, Sue	Coe, Sebastian		Housework
Friday	09/11/2018	0	05/11	05:00	06:00	Carey, Manah	Lopez, Jennifer		Morning Call - Get Up ...
Saturday	10/11/2018	0	05/11	00:00	23:59	Greenfield, Lynn	Ferguson, Alex		Personal Care
Sunday	11/11/2018	0	05/11	00:00	23:59	Ora, Rita	Flogen, Selh		Personal Care
Week comm	05/11/2018	11	05/11	10:00	11:00	Bishop, John	Beaumont, Bill		Pension
			05/11	10:30	11:00	Bishop, John	Evans, Chris		Morning Call - Get Up ...
			05/11	10:00	10:15	Willeby, Holly	Barker, Sue		30 Minutes Of Exercis...

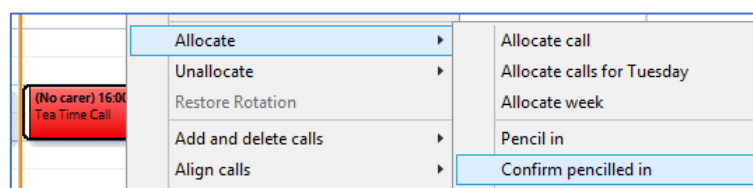
3. Select the call you wish to confirm
4. Click the **Confirm** button to allocate to call to the pencilled-in Carer

Alternatively, on the rota when hovering over a call the call's tool tip will display whether the call has a pencilled-in Carer.



To confirm the pencilled-in Carer at this stage:

1. Right-click the call
2. Go to **Allocate**
3. Click **Confirm pencilled in**

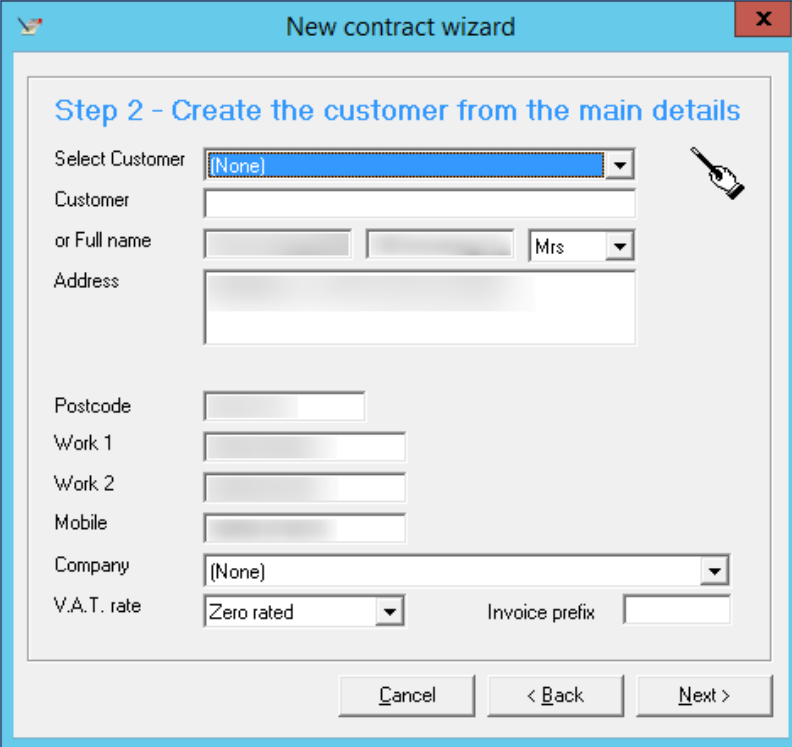


The call will then automatically be allocated to the Carer who was pencilled in.

# Contracts

An option to choose an existing customer when adding in a contract using the contract wizard screen has been added.

1. Go to the Client's screen
2. Go to the **Contracts** tab
3. Click **Edit**
4. Right-click in the contracts screen
5. Click **New Contract**
6. Ensure **Use the wizard to help you** is selected then click **Next**



The screenshot shows a software window titled "New contract wizard" with a close button (X) in the top right corner. The window content is titled "Step 2 - Create the customer from the main details". It contains several input fields and dropdown menus:

- Select Customer:** A dropdown menu currently showing "(None)".
- Customer or Full name:** A text input field.
- Address:** A large text input field.
- Postcode:** A text input field.
- Work 1:** A text input field.
- Work 2:** A text input field.
- Mobile:** A text input field.
- Company:** A dropdown menu currently showing "(None)".
- V.A.T. rate:** A dropdown menu currently showing "Zero rated".
- Invoice prefix:** A text input field.

At the bottom of the window, there are three buttons: "Cancel", "< Back", and "Next >". A hand cursor icon is visible over the "Select Customer" dropdown.

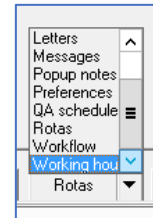
7. Use the **Select Customer** drop-down box at the top of this screen to select an existing customer for the new contract – this will update in the relevant fields below
8. Complete the contract as normal

# Working Hours

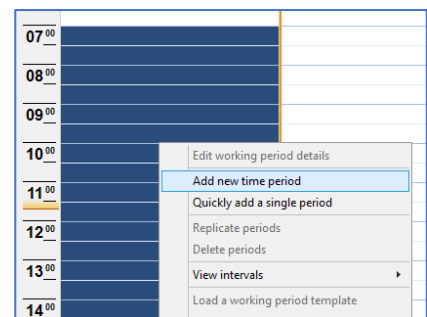
## Office Hours

A new working hours option has been added to CareFree called **Office Hours**. This is useful when staff members do a mixture of calls and office work.

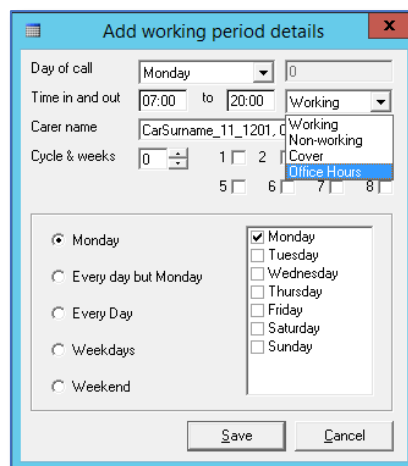
1. To update a Carer's working hours, go to the Carer's screen and select the Carer
2. Click the rota drop-down option and click **Working Hours**



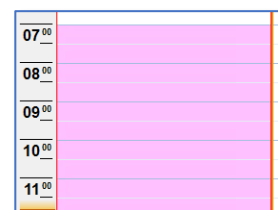
3. Highlight a working/non-working area, right-click and choose **Add new time period**



4. There is an option to choose **Office Hours** from the working drop-down box



5. When the office hours are entered, they will show in pink on the rota

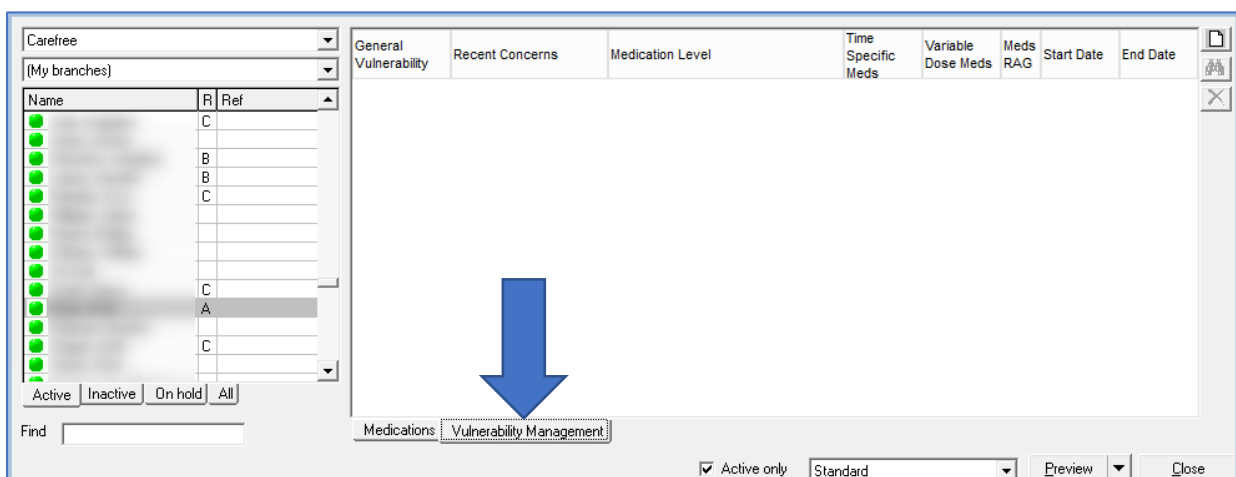
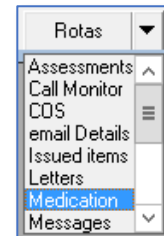



# Medication

## Vulnerability Management

A tab has been added on the medication screen for vulnerability medication management (VMM).

1. In a Client's record, click the Rota drop-down menu
2. Click **Medication**
3. This will load the Medication screen – click the **Vulnerability Management** tab at the bottom of the screen



4. Click the  button at the top right of the screen

The screenshot shows a form titled "Vulnerability Management Item" with the following fields and callouts:

- 1** points to the "General vulnerability" dropdown menu, which is set to "High".
- 2** points to the "Recent concerns" dropdown menu, which is set to "Yes (In The Last 6 Months)".
- 3** points to the "Medication Level" dropdown menu, which is set to "Full Administration With Medicines".
- 4** points to the "Time specific" dropdown menu, which is set to "Yes".
- 5** points to the "Variable dose" dropdown menu, which is set to "No".
- 6** points to the "Start date" and "End date" fields. The start date is "01/07/2018" and the end date is "31/12/2099".
- 7** points to the "Meds RAG" text input field, which contains the number "5".
- 8** points to the "Save" button.

1	The <b>General Vulnerability</b> can be marked as High, Medium or Low <i>This list can be populated from the Items screen using the General Vulnerability list</i>
2	The <b>Recent Concerns</b> can be marked as Yes or No <i>This list can be populated from the Items screen using the Recent Concerns list</i>
3	The <b>Medication Level</b> can be marked as Administer, Assist or Prompt <i>This list can be populated from the Items screen using the Medication Level list</i>
4	The <b>Time Specific</b> can be marked as Yes or No <i>This list can be populated from the Items screen using the Time Specific list</i>
5	The <b>Variable Dose</b> can be marked as Yes or No <i>This list can be populated from the Items screen using the Variable Dose list</i>
6	Enter a <b>Start Date</b> and <b>End Date</b> of this assessment
7	With every item that is selected from the list a <b>Meds RAG</b> score is calculated. A score for each item in each list can be entered using the lists above from the Items screen
8	Click <b>Save</b> to save this information in the Vulnerability Management tab

# Medication Times

A medication time can now be added to call details and through the package wizard.

When a medication time is added to the call, CareFree will look at what has been entered in the medication screen for the client. The relevant medications will then show on the call in RoadRunner. The relevant update for RoadRunner needs to be applied for this to take effect.

## Call Details Screen

Call details for Paul

Start date: 17/07/2018 12:00 Type: Weekly

End date: 17/07/2018 13:00

Client: Paul

Carer: Davis, Laura

Medication: Prompt

Medication Time: AM

Run: (None)

Contract: Private

Site: (None)

Site call must be allocated

Override the default role: (None)

When changes are made - apply them to:

This week: 16/07/2018

Upto w/e: 29/07/2018

This week & beyond: 31/12/2099 16/07/2018

P1257 Save Cancel

## Package Wizard Screen

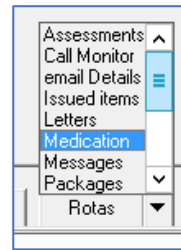
Care Package Wizard

Week: 16/07/2018 Monday


	W	T	F	S	S	x2	Times	Spans	Call Type	Contract	Need	Medication	Med Time
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## Client's Medication Screen

1. Go to the Client's screen
2. Click the Rota drop-down
3. Go to **Medication**



Name	R	Ref	Medication	Dosage	Time	Other time	Form	Route	Location	Support required	Hours in between
Adalat			Adalat	apply to area ...	AM		Liquid	Orally		Administer	0
Aspirin			Aspirin		Tea		Blister Pack	Orally			8
Barrier Cream			Barrier Cream		Tea						0
Dioctyl			Dioctyl	apply to area ...	PRN		Cream	Transdermal		Administer	0
E45			E45	apply to area ...	Bed		Cream	Transdermal	Bathroom c...	Administer	0
Ibuprofen			Ibuprofen		AM						0
Paracetamol			Paracetamol	2 tablets ever...	PRN		Blister Pack	Orally		Prompt	4

4. Click the  button to add a new medication

**Medication Item**

Medication: Paracetamol | Dosage: 2 tablets every 4 hours

Time: AM | Other time: :\_

Form: Tablet | Route: Orally

Location: | Support Required: Prompt/Assist

Hours in between: 0

Notes: | Start date: 06/08/2018 | End date: 31/12/2099

Buttons: Save, Cancel

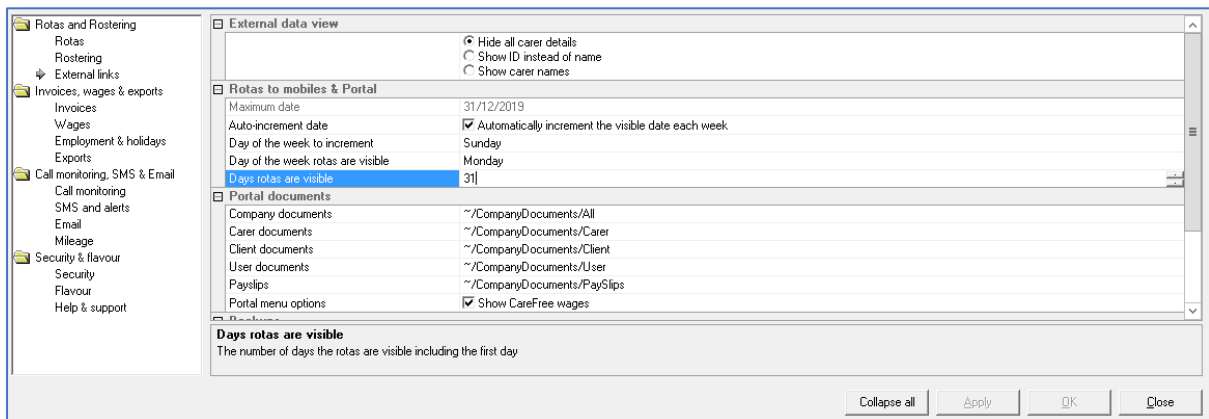
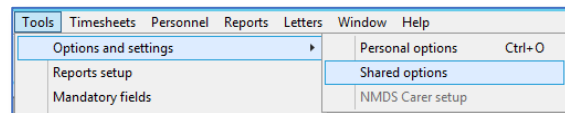
5. Fill in all the relevant information about the medication then click **Save**
  - a. A new time option has been added called PRN which means the medication is taken when necessary

# RoadRunner

## Days Rotas are Visible

Users have the ability to change the maximum amount of days the rota is visible to a Carer using RoadRunner to view their rota.

1. Click **Tools**
2. Go to **Options and Settings**, then **Shared Options**
3. Click **External Links**



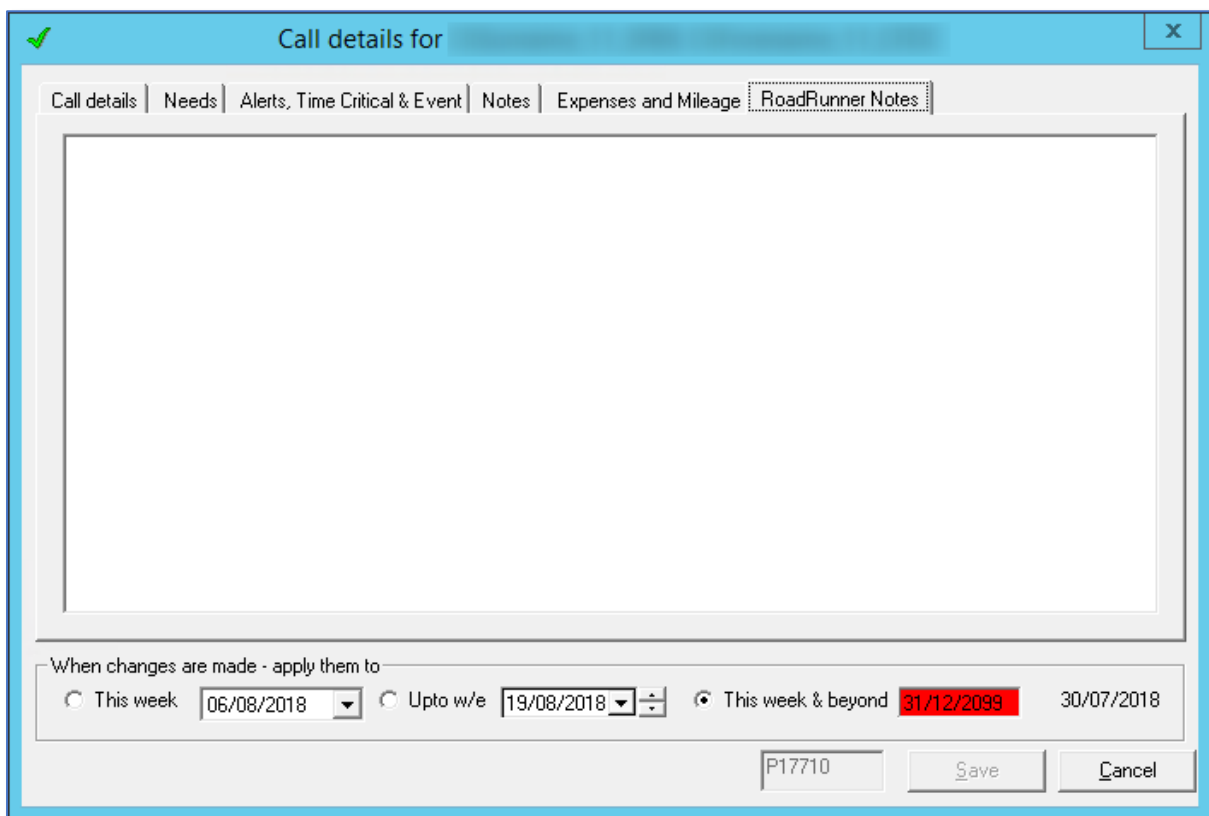
4. Change the number in the field named **Days rotas are visible**  
*The maximum number of days visible that can be set is 31*
5. Click **OK** to apply these changes and close the shared options screen



## RoadRunner Notes

A read only text box has been added to the call details showing the notes made by a Carer when they log out of a visit.

1. Go to the rota
2. Double-click a call
3. Click on the **RoadRunner Notes** tab



The screenshot shows a software window titled "Call details for" with a green checkmark icon in the top-left corner and a close button (X) in the top-right corner. The window has a tabbed interface with the following tabs: "Call details", "Needs", "Alerts, Time Critical & Event", "Notes", "Expenses and Mileage", and "RoadRunner Notes". The "RoadRunner Notes" tab is currently selected and active. The main content area of the window is a large, empty rectangular text box. At the bottom of the window, there is a section titled "When changes are made - apply them to" with three radio button options: "This week" (with a date dropdown set to 06/08/2018), "Upto w/e" (with a date dropdown set to 19/08/2018 and a plus/minus icon), and "This week & beyond" (with a date dropdown set to 31/12/2099, which is highlighted in red, and a date 30/07/2018). Below this section, there is a text input field containing "P17710", a "Save" button, and a "Cancel" button.

Any notes that have been entered by the Carer can be viewed from this tab.