CareFree v5.5.7
Training Guide

Contents

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

Creation Date	Author	Product & Version	Document Version
24/10/2018	Lyndsay Williamson	CareFree 5.5.7	V1
30/10/2018	Lyndsay Williamson	CareFree 5.5.7	V2
05/11/2018	Lyndsay Williamson	CareFree 5.5.7	V3
05/11/2018	Lyndsay Williamson	CareFree 5.5.7	V4
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.
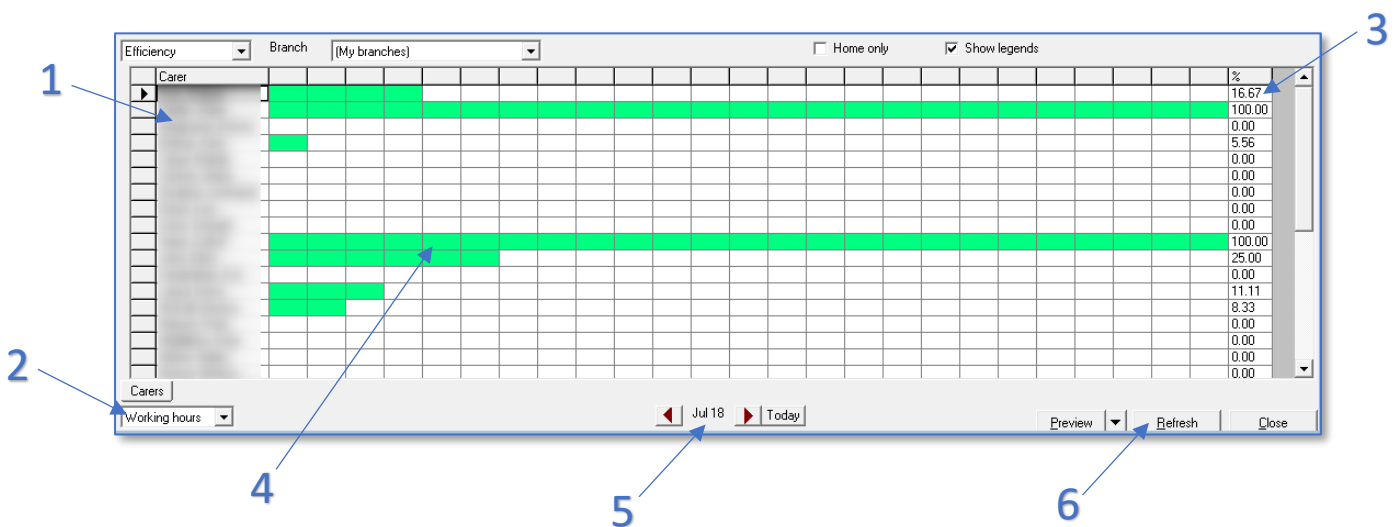
Please note, there are a number of version updates combined in this training guide so there may be updates/changes that you already have been using.

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.
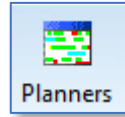
1. Click on the **Planners** icon

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 **Working Hours** or **Start-Finish** 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 **Refresh** 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**
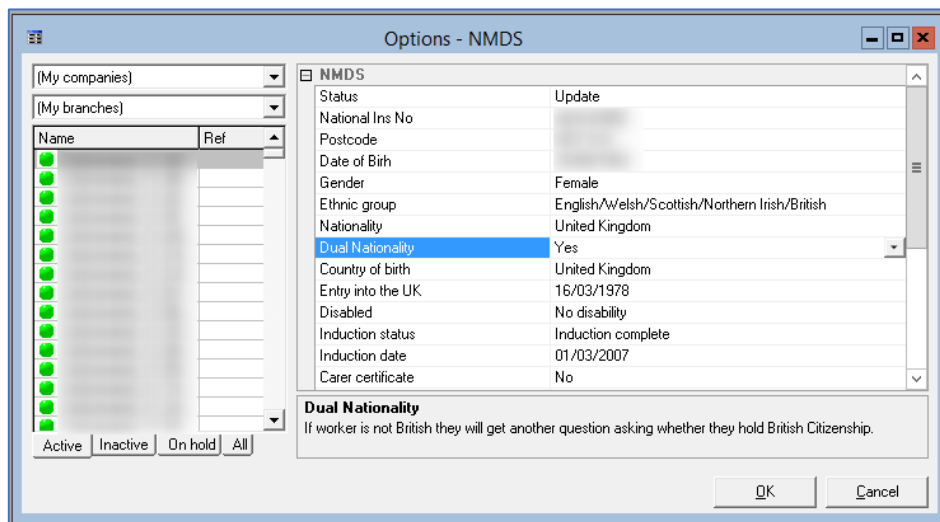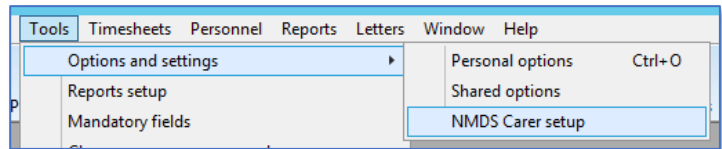
5. This option can be set **Not Known**, **Yes** or **No**

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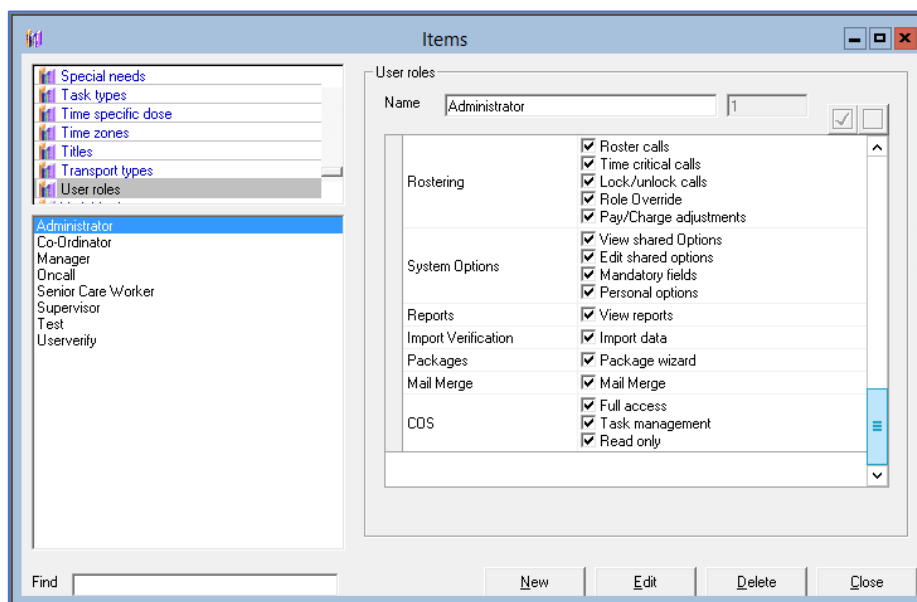
Another restriction has been added to the user role is the ability to enable/disable editing of Client and Carer PINs for ECM.
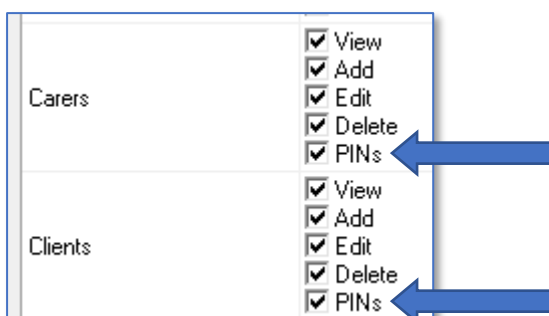
Rotas

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
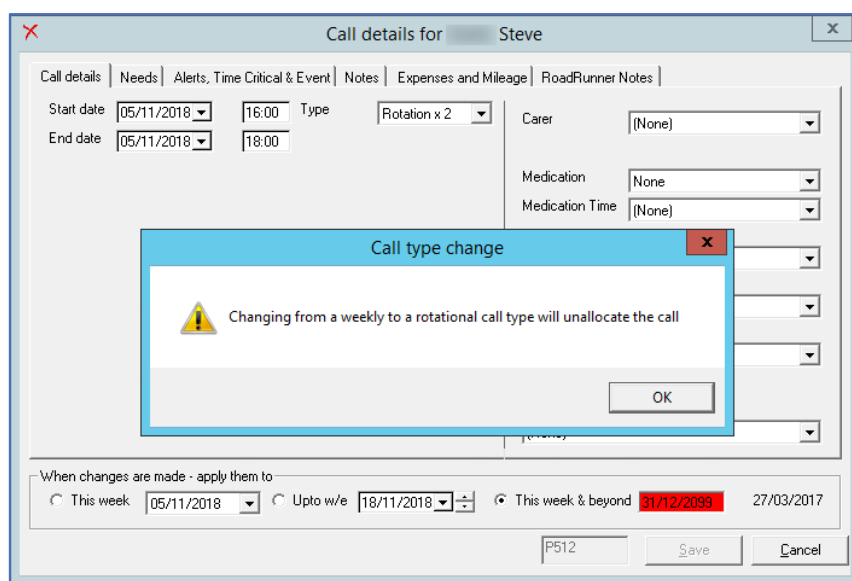
3. A prompt will display stating that the call will become unallocated by changing the call type

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
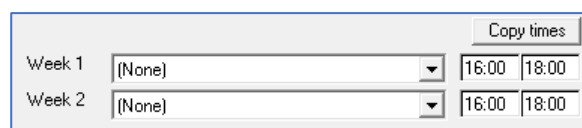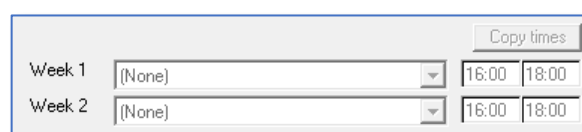
Pencilled-in Carers

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

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

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

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.
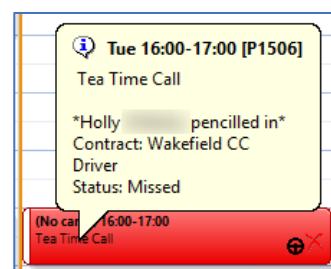
To confirm the pencilled-in Carer at this stage:

1. Right-click the call

2. Go to **Allocate**

3. Click **Confirm pencilled in**
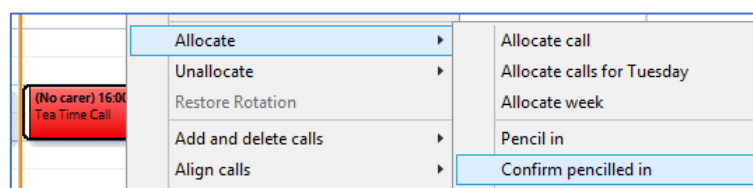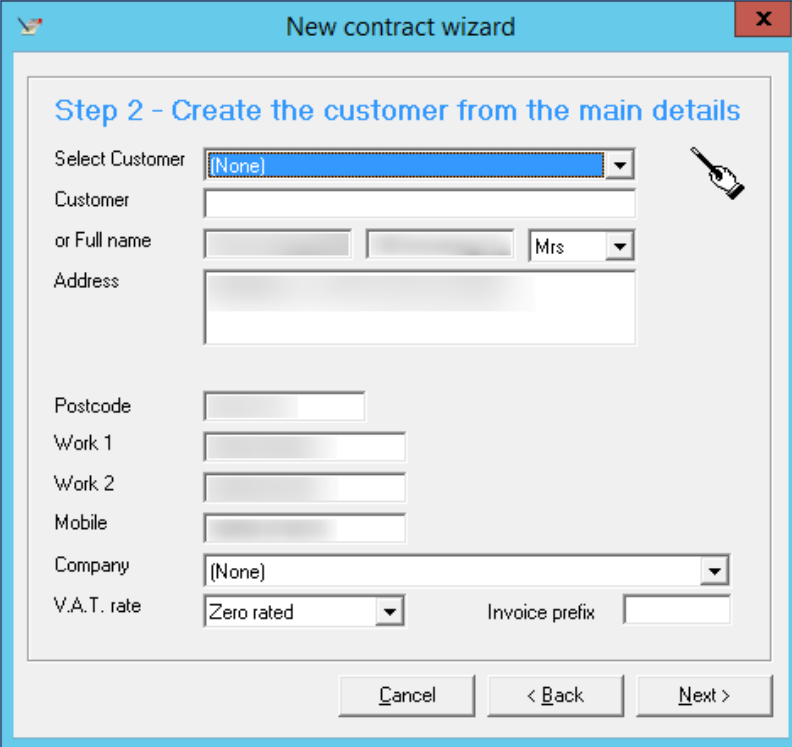
The call will then automatically be allocated to the Carer who was pencilled in.

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**

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**
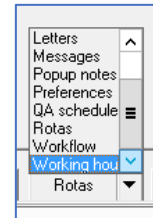
3. Highlight a working/non-working area, right-click and choose **Add new time period**
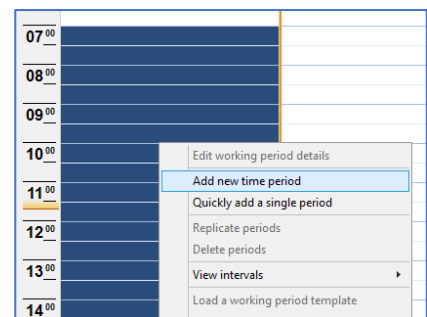
4. There is an option to choose **Office Hours** from the working drop-down box
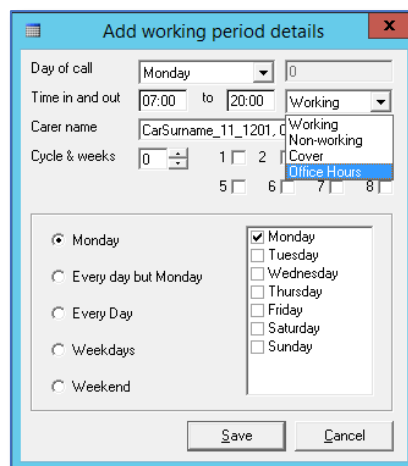
5. When the office hours are entered, they will show in pink on the rota
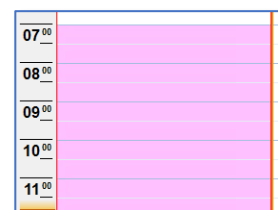
Medication

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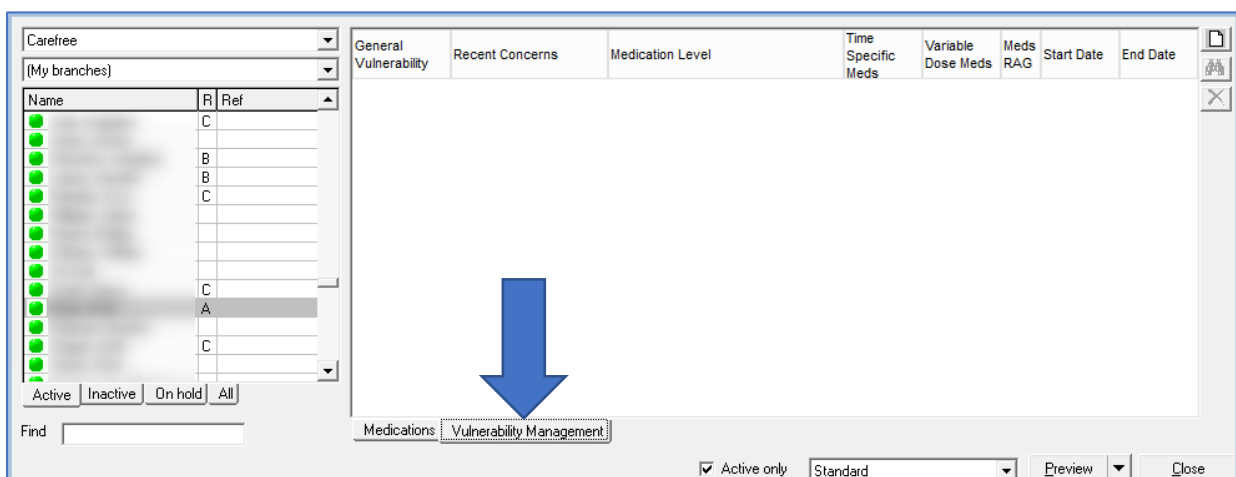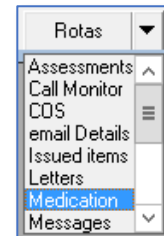
4. Click the button at the top right of the screen

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

Package Wizard Screen

Client's Medication Screen

1. Go to the Client's screen

2. Click the Rota drop-down

3. Go to **Medication**


4. Click the button to add a new medication

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**
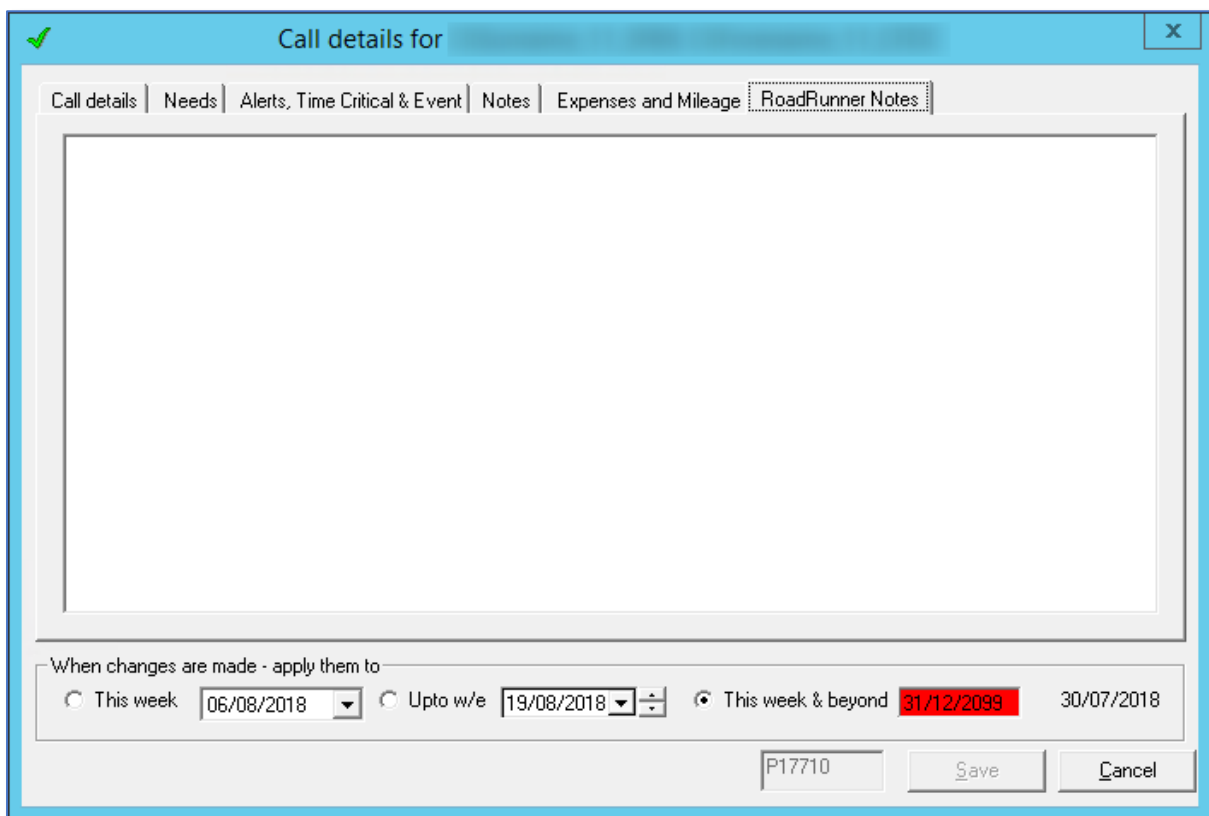
3. Click **External Links**
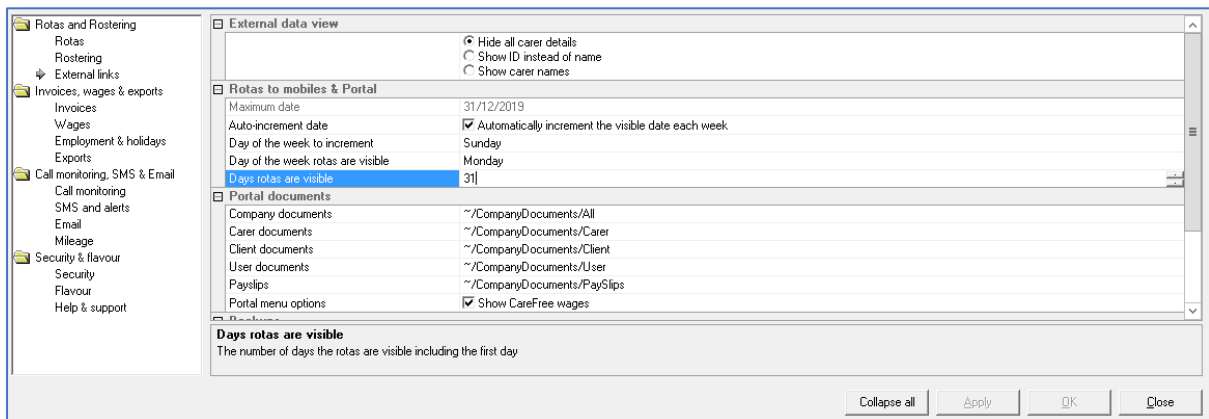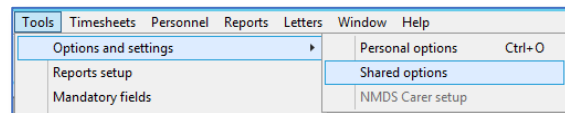
4. Change the number in the field named **Days rotas are visible**
   The maximum number of days visible that can be set is 31

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

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