

CareFree Day 2 Training Guide



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12/07/2018	Lyndsay Williamson	V1

Adding Working Hours

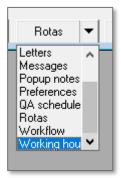
In order for CareFree to provide more accurate insights into capacity planning and allocate Carers more effectively it is helpful to add your Carers working hours to the database.

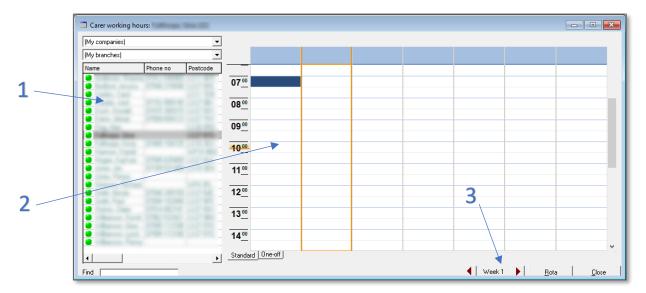
Entering Carers working hours into CareFree will not prevent you from allocating calls outside of this time period. You will simply be warned that the call falls outside of the Carers working pattern.

Completing this task will affect how accurate the recommendations are that are returned when filling unallocated calls.

Specify a Working Pattern

- 1. Open the Carers screen
- 2. Select the Carer whose working hours you wish to add in the list on the left of the screen
- 3. Click on the drop-down arrow next to the **Rotas button**





4. Select Working Hours

1	Select the Carer here
2	Working hours are added here
3	Use the arrows to skip through weeks

5. **Right-click** on the blank area where working hours are added (point 2 on the previous screenshot)

	Add working period details	
1	Day of call Monday 🗨 🛛	4
	Time in and out 08:00 to 17:00 Working	
	Carer name	
2	Cycle & weeks 2 + 2 2 3 4	
-	5 6 7 8	
3	 Monday ✓ Monday ✓ Tuesday ✓ Every day but Monday ✓ Wednesday ✓ Thursday ✓ Friday ✓ Saturday ✓ Sunday ✓ Weekend 	——5
	<u>S</u> ave <u>C</u> ancel	

6. Click Add New Time Period

1	Enter start and end times for working periods here
2	For Carers who work alternating shift patterns, specify how many
	weeks the cycle runs over 2 🚽 and then say which week(s) you are
	specifying for the working pattern for 💵
3	Choose a pre-set pattern for the days the Carer works here
4	Either working, non-working, cover or office hours can be specified
	here
5	Select the days to create your own pattern here

Specify a One-Off Working Week

A one-off working week may need to be entered when the Carers working pattern changes for a week or for a certain period of time.

- 1. In the **Working hours** screen, click the **One-off** tab at the bottom of the screen
- 2. Instead of seeing week 1, 2, 3 etc, at the bottom of the screen. Instead there is the option to select a specific week. Go to the week where the oneoff working time period needs to be entered

lt5/10/2018 ➡ Mon		
	15/10/2018 🗨 🕂	Mon

Standard One-off

07 00

- 3. Right-click on the blank area where working hours are added
- 4. Click Add New Time Period
- 5. The screen that appears is the same screen as described on <u>page 6</u> except there is no option to specify a week cycle as this is a one-off time period. It is important to note that you will need to plan the whole week of working hours if this option is used.

Add Add	working period details
Day of call Time in and out Carer name	Mon 15 Oct O O O O O O O O O O O O O O O O O O
C Mon 15 Oc C Every day I C Every Day C Weekdays C Weekend	v Tuesday but Mon 15 Oct v Wednesday v Thursday v Friday Saturday
	<u>Save</u>

6. Click Save and repeat on additional weeks if necessary

Advanced Rotas and Rostering

In the first day of training we covered the basics in terms of building packages of care and adding calls to the Rota. We will now look at the more advanced features and functions in relation to Rotas and rostering.

Adding and Deleting Away Periods

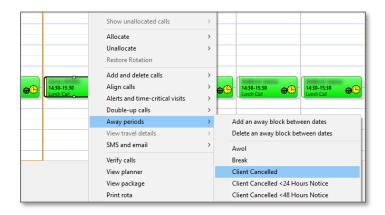
You would normally add an away period to the Rota when you have been made aware that a Client or Carer is going to be away i.e. Client is in respite or Carer is on holiday.

- Away periods can be added to an individual call or for a specific block of time
- Away periods always show blue if a Client is away and yellow if a Carer is away
- The reason for the away period will be displayed at the top of the day(s) in which the away period(s) show

Adding an Away Period to a Call

This method of adding away periods is commonly used for when a Client has cancelled a call.

- 1. Select the call on the Rota with a single left click
- 2. Right-click on the Rota and click Away Periods
- 3. In the sub-menu choose the most appropriate away reason



The away reasons list can be amended in the items screen

Monday 13 Wednesday 14 Thursday Friday 11 12 Tuesday 15 16 14:30-15:30 14:30-15:30 14:30-15:30 14:30-15:30 14:30-15:30 @® @® **e**® ⊕"5 e® Away periods Agreements

An away period will then be added to the call on the Rota.

Adding an Away Block for a Client or Carer

An away block could be added to a Client or Carer Rota for a number of different reasons. For example, Carer holiday, Carer sickness, Client in hospital, Client in respite etc.

To Add an Away Block

- 1. Go to the Rota for the Client or Carer where an away block needs adding
- 2. Right-click on the Rota
- 3. Click Away Periods
- 4. Select the first option in the sub-menu which allows you to **Add an away block between dates**

Double-up calls	>	
 Away periods	>	Add an away block between dates
View travel details	>	Delete an away block between dates
SMS and email	>	Awol

To Add an Away Block continued...

	📰 Add a bl	ock of diary entries	×
	 Add a block 	ock between start date/time and end date/time	
	C Add a re	beat block for selected days between times	
1	Person	✓ Wedness ✓ Thursda	
	Date from	13/06/2018 V to 13/06/2018 V Friday	4
_	Time from	00:00 to 23:59 All day No end Saturday	
2	Reason	Holiday On hold Sunday	
/	Holiday	1 Every week	· · · 5
3			
		<u>Save</u>	ncel

1	Specify a start and end date for the away period. If the end date is not
	known click the No End button
2	Specific hours within a day can be chosen for the away period.
	Alternatively, the All Day button can be used which enters 00:00 -
	23:59
3	When adding away periods for Carer holidays use this box to deduct
	the correct amount of annual leave hours or days from the Carer's
	entitlement
4	Specify the reason for the away period here
5	To place a Client or Carer on Hold. Place a tick in the On Hold box
6	Notes can be added to show on a Client or Carer Rota

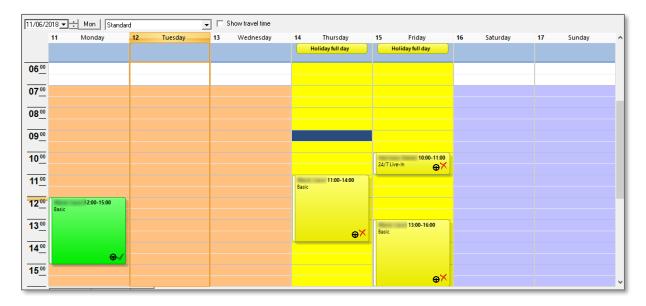
If a Carer is allocated to call when you add in an away period, you will be notified which calls will be affected. It is possible to allocate the affected calls to a different Carer from within this notification window by clicking on the drop-down arrow next to the Carers name and selecting an alternative Carer from the list.

Date	Times	Carer	Client	Need
Thu 14/06/2018	11:00-14:00	"Record London."	Tract Land	Basic
Fri 15/06/2018	10:00-11:00	Contract of the second se	Hamister, Daniel	24/7 Live-In
Fri 15/06/2018	13:00-16:00	-	Interest Cases	Basic

If you do not wish to re-allocate the calls there and then they will automatically be added to the list in the unallocated calls screen.

To learn more about the unallocated calls screen please refer to the CareFree Day 1 Training Guide

The away period will now display on the Rota.



Adding Repeating Away Blocks

Repeating away blocks can be used for away periods which happen regularly on a Client or Carer Rota. Possible scenarios for the use of repeating away blocks would be a regular day of respite care for a Client or a Carer who regularly attends college on a specific day of the week.

- 1. Go to the Rota for the Client or Carer where an away block needs adding
- 2. Right-click on the Rota
- 3. Select Away Periods
- 4. Select the first option in the sub-menu which allows you to Add an away block between dates

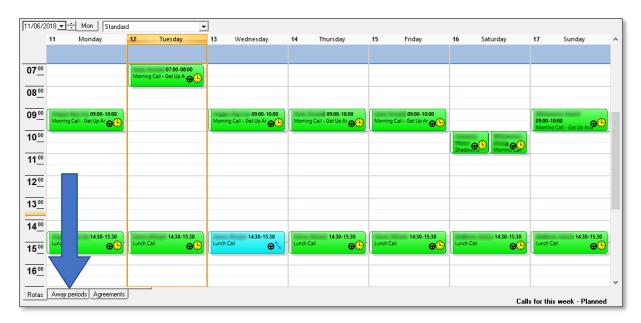
Double-up calls	>	
 Away periods	>	Add an away block between dates
 View travel details	>	Delete an away block between dates
 SMS and email	>	Awol
Verify calls		Break

4	📰 Add a b	lock of diary entries	×
1	🔿 Add a bl	ock between start date/time and end date/time	/
	🍋 Add a re	peat block for selected days between times	у
	Person	Eaton, Alistair Wednes	·
2		, Thursda	ay 🚺 🖊
2	Date from	14/06/2018 - to 28/10/2018 - Friday	
	Time from	08:00 to 11:00 All day No end	·
3	Reason	Hospital	
	Holiday	0 hours holiday remaining Every wee	k ∢ √ 5
			6
		Save 4 Ca	ncel

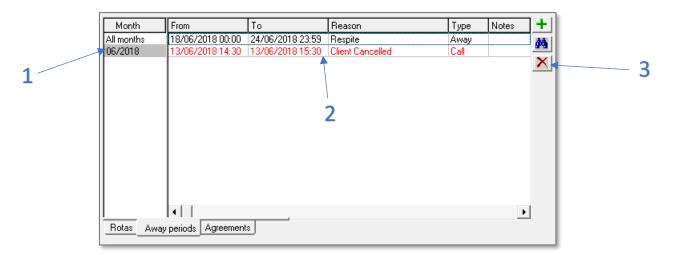
1	Ensure the options to Add a repeat block for selected day between times is selected
2	Ensure the date range covers the period during which the Client or Carer will be away
3	Select an appropriate reason using this drop-down menu
4	Choose which day/days the away period should be repeat on
5	Select the frequency with which the away period repeats
6	Click Save to save the away period

Deleting, Amending and Ending Away Periods

The most straightforward way of deleting or ending away periods from a Client or Carer Rota is by using the **Away Periods** tab in the Rota screen.



Use the away periods tab to access and amend away periods which have previously been added to the Rota. The tab also allows you to delete away periods which are no longer required.



1	Select the month the away period is in
2	Double click on an away period to open and amend details
3	With an away period highlighted click the 赵 icon to delete it

Where an away period has been added to the Rota with no end date the away periods tab can be used to access the details and to specify an end date when the Client/ Carer returns.

- 1. Go to the Rota
- 2. Open the Away Periods tab
- 3. Locate the away period and double click on it to view the details
- 4. Enter the end date of the away period in the To Date field
- 5. Uncheck the **On hold** option if the Carer/Client had been placed on temporary hold

🔳 Away pe	riods	×
From date	01/03/2018 💌 00:00	All day
To date	19/06/2018 💌 23:59	No end
Reason	Respite	•
	🔽 On hold	
	<u>S</u> ave	<u>C</u> ancel

It is also possible to add away periods to Client or Carer Rotas from within the away periods tab. Simply click on the + icon to begin adding a new away period. This is useful for when you need to add Carer holidays a long way in advance as the Rota screen only displays data for the next 13-week period.

Shadowing Calls

Within the Rota screen you are able to allocate single or multiple calls to a Carer to shadow another Carer on their Rota.

- 1. Open the Rota you wish to create shadowing calls on
- 2. Either highlight one call or hold down the **CTRL** key on the keyboard and left-click on each call you wish to select
- A black outline will appear around the selected calls
- 4. Right-click on the Rota
- 5. Select Add and Delete Calls
- 6. Click Make Shadowing Calls

Carer	Phone No	Status	
Anderson, Shauna	07412 548965		
Bedford, Jessica	07548 215698		
Cardiss, Carol			
Daniels, Jack	07152 958145		
Duck, Donald	07415 369215		
Eaton, Alistair	07589 654123		T
Frog, Alan			
Fulthorpe, Gina			
Fulthorpe, Kirsty	07485 154725		
Harrison, Daniel			
Hogan, Kay'Lee	07545 625489		
Jones, Jim	07189 521458		
Jones, Penny			
Simmons, Richard			
Smith, Nicola	07548 245159		
Smith, Paul	07894 152948		
Williamson, David	07862 532421		
Williamson, George	07585 112188		
Williamson, Lyndsay	07585 112188		
Williamson, Penny			
Mouse, Minnie (Inactive)			
Smith, John (Inactive)			

Restore Rotation Add and delete calls Add new calls Align calls Replicate calls Alerts and time-critical visits Delete calls Double-up calls Make shadowing calls Set planned times to match actuals Away periods View travel details Set Agreement ID Add a OA schedule SMS and email Verify calls

7. Select the Carer who will be shadowing on the selected calls

8. Click OK

9. Shadowing calls for all selected calls will then be added to the selected Carers Rota

10 <u>00</u>						
11 <u>00</u>	11:00-12:00 Mornino Call - Get 00	11:00-12:00 Shadowing	⊕.√	11:00-12:00 Morning Call - Get 00	11:00-12:00 Shadowing	⊕√
12 <u>00</u>	(12.000.000	

Adding Rotational Calls

A Rotational call is one which occurs weekly but is covered by Carers who work in Rotation for example, Carer A covers week 1 Carer B covers week 2.

It is possible to make only certain Carers available to cover calls in specific weeks. Specify which Carers will work on each Rotation in the items screen.

Setting Carer Rotations in the Items Screen

1. Open the **Items** screen



2. Select Carers and Weeks in the box at the top left of the screen

	🕅 Items			
1		Carers and weeks Week no Week 1		
	Company Contact types Contract types Counties Week 1 Week 2	Carer	Branch	
2	Week 3 Week 4 Week 5 Week 6 Week 7 Week 8	Later, Allen Frag, Alex Fuldhouse, Direc Fuldhouse, Dank Hassen, Dank Hassen, Dank Area, All Areas, Fuldan Dansen, Fuldan Dansen, Fuldan Dansen, Fuldan		3
	Find	New	Edit Delete Close	

1	Select Carers and Weeks from the items list
2	Pick the Rotation week you would like to make Carers available for
3	Enter edit mode and click use to select the Carers you want to make available in the selected Rotation week

Adding a Rotational Call

- 1. Go to the Rota of the Client you want to add a Rotational call to
- 2. Right-click anywhere on the Rota
- 3. Select Add and Delete Calls from the right-click menu
- 4. Select Add New Calls

1	2	3	/	4
\backslash				
Add calls for				×
Call details Needs Alerts, T	"ime Critical & Event Notes Expenses and Mile	eage		This day only
Start date 16/06/2018	13:30 Type Rotation x 2	Carer IN	one) 💌	C Every day except
End date 16/06/2018 -	14:00	10.		O Weekdays
Double-up 🗖		Medication (N	one) 💌	O Weekends
	Copy times	Run		Mon 11 Jun
Week 1 (None)	▼ 13:30 14:00	(None)	•	Tue 12 Jun
Week 2 (None)	▼ 13:30 14:00			Wed 13 Jun Thu 14 Jun
				Fri 15 Jun
		Site		Sat 16 Jun
_	6	(None)	•	Sun 17 Jun
5	0	Site call must be a	allocated	
		Override the default ro	ble	Contract
		(None)	•	
 _──When changes are made - appl	ly them to			
	-	This week & beyond	11/06/2018	
			PO	<u>Save</u> <u>C</u> ancel
/			8	/

1	Specify at least one need for the call
2	Use the date field to specify the week that the call(s) will first appear on the Rota
3	Select the Rotational pattern you need in the Type menu
4	Complete all other call details as per the content covered in the CareFree Day 1
	Training Guide
5	Choose the Carers who will cover the calls in the Rotation
6	Different call times can be specified for each week of the Rotational pattern
7	Select the appropriate working mode
8	Click Save to add the call

Once created you can see at a glance which week of the Rotation a specific call relates to as it will show a number in the

bottom right of the call box as shown to the right.



Rota Split Screen View

The split screen view enables users to view the Rotas for both Clients and Carers simultaneously. To open the split screen Rota view:

- 1. Go to the **View** menu
- 2. Select Rota Split Screen

20	CareFre	e				
File	View	Tools	Timesheets	Personnel	Report	
	Rotas Ctrl+R					
Rota split screen						
KOL		Planners		Ctrl+P		
		Connecitu	nlannar			

y companies)			-	(My branche	es)			11/06/2	018 🔫 🕂 🗌	Mon	_										
arer	∠ Hours		11 Mon	12 Tue	13 Wed	14 Thu	15 Fri	16 Sat	17 Sun	^	Client	🛆 Hours 🔺		11 Mon	12 Tue	13 Wed	14 Thu	15 Fri	16 Sat	17 Sun	
den en Transe	00:00										And the second	00:00									
	09:00										Local Area	00:00									
	07:30	07 00										14:00 02:00	07 00								
	07:00	_									fortunation, Mark	00:00	_								
	03:00	08 00										00:00	0800								
	04:00											25:30									
	01:00	0900									Look, Perce	00:00	0900	(No		(No			(No carer)	(No carer	ð
	00:00											01:00		Contract	θ¢×	Maritin a	⊕ ∆⊕	<u>"</u>	⊕ ¢≪	⊕ ⊘∕∕	
	02:00	1000									Incasting Trees	00:00 84:00	1000								
	00:00							™⊕⊕⊮			Concerned, Mancook	00:00									
	01:00	11 ⁰⁰									The second second	00:00	11 ⁰⁰								
	00:00										transa lisasi	03:00									
in lineti	00:00	1200										00:00	1200	(No		(No	(No	(No	(No carer)	(No carer	D
	02:00											00:00		Ca 200	2 0 ×	Ca 200	G 200	G200	[™] 2⊕≻	[™] 2⊕∑	Ľ,
	10:00	1300										00.00	13_00								
	00:00																				
		14 <u>00</u>											14 00								
		15 <u>00</u>											15 <u>°</u>								
		16 <u>00</u>											16 <u>°</u>								
												•									
		17_00										<u> </u>	17_00								
indard		18 <u>00</u>								~	Standard	•	18 <u>°</u>								
ply the change																					
[his week] (This week &	beyond														Allocat	be Bi	efresh	Preview .	• <u>C</u> lo	a:

Carer Rotas are listed on the left of the screen and Client Rotas are listed to the right of the screen.

Set Rota Split Screen as the Default Rota View

Users can opt to use the split screen as their default viewing mode for the Rota. To change the default viewing mode:

- 1. Go to the **Tools** menu
- 2. Select **Options and Settings** and choose **Personal Options**

[Sp	lit Rota	s: Carer - Willia	amson, Geor	ge (6), Clie	ent - Mun	day, Maure	en (36)]		
w	Tools	Timesheets	Personnel	Reports	Letters	Window	Help		
	C	ptions and set	ttings		>	Perso	nal options	Ctrl+O	
	R	eports setup				Share	d options		
nn	N	landatory field	ls			NMD	S Carer setup		\vdash
s)	C	hange your o	wn password		L			▼ 117/06	7201

- 3. Ensure General & Rostering is selected on the left of the screen
- 4. Scroll down to the section **Rostering and Rota Screen** on the right of the screen
- 5. Tick the option named Use the split screen as the default
- 6. Click **OK** to save the changes

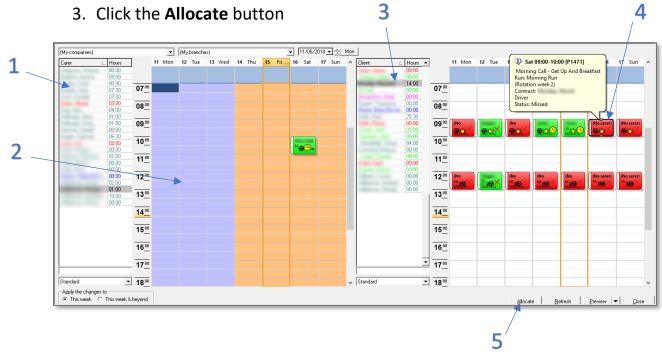
Personal Options General & Rostering People	Safety options	✓ Continn val deletions ✓ Continn valene exiting ✓ Double click editing	^
Rotas	Lock screen if idle for 'x' minutes	0	
External Links	Regions & mapping		
InVu Email	Regions	C UK C Eire	
SMS & Telephony	Mapping	ⓒ Google Maps C Microsoft MapPoint	
	Google Maps	Use the browser to display maps	
	Excel exports	Excel US dates	
	Messages and alerts		
	Check for messages	0	
	Check for notifications	0	
	Alerts sound		
	Messages sound		
	Alert screen	V Modal screen	
	Inbox	Popup for new messages	
	Rostering and Rota screen		
	Options	✓ Use matching cateria for rostering ✓ character care working houss: an ord a ✓ character working houss: an ord a ✓ character between calls ✓ character care working house and caterian calls ✓ hour boarders is of the work & beyond ✓ Aland wagang and dragoing of calls ✓ hour wagang and dragoing of calls ✓ show status is on on the calls ✓ show status is on on the calls ✓ show status is on on the calls	
	Highlight by contract type		×
		Colapse alQK	Close

Once saved the next time the Rota is opened the split screen will launch.

Allocating Calls in Split Screen View

The split screen provides useful insight into Carer workloads and helps to identify suitable spaces in Rotas when users are attempting to allocate calls on Client Rotas. Users can simply move down through the list of Carers until an appropriate space is identified. Once an appropriate Carer has been found users can:

- 1. Select the Carer who you wish to allocate the call to
- 2. Select the call on the Client Rota



1	Select a Carer on the left of the screen
2	The selected Carers Rota has a suitable space for the unallocated call. Working hours are also shown on this screen. Refer to page 5 for more information on
	working hours
3	Select a Client on the right of the screen
4	Select the unallocated call to allocate to a Carer
5	Select Allocate to allocate the selected Client call over to the selected Carer's Rota

Site Types and Site Rota View

You may wish to use this functionality if you provide care to Clients at external sites and locations e.g. care homes, day centres etc. To begin using the Site Rota View, a list of alternative Sites and Site Types must first have been created within the Items screen:

- 1. Open Items
- 2. Go to Site Types in the list at the top left of the screen
- 3. Click **New** to create a new site type and complete the details in the boxes

# Envis # Service byten # Service byten	Site types- Name Code	Care Home		
Find		New	Edit De	lete <u>C</u> lose

Once the Site Types list has been updated, you can begin to store details for the Sites you require:

- 1. Open Items
- 2. Go to Sites in the list at the top left of the screen
- 3. Select New to create a new site and complete the details in the boxes

🕼 Items		c
If Service types If Service users If Security of Secu	Stes Name [Alcompany] [Alcompanies] Address	
	Postcode Phone 1 Phone 2 Mobile Fax no Fax no Fax	
	Beds 0 Type Care Hone Day Cente Living Residence Supported Living	
Find	New Edit Delete Doce	

Add new sites to the appropriate site type category using the **Type** drop down menu.

Creating Site Calls on the Rota

Once the list of sites has been populated, return to the Rota screen to begin categorising calls which take place at alternative locations.

- 1. Either double click single calls, or highlight multiple calls, right click and select **View Multiple Calls**
- 2. Select the site from the drop down menu

✓ Call details for	×
Call details Needs Alerts, Time Critical & Event Notes Expenses and M	fileage
Start date 16/06/2018 Ti:00 Type Weekly Ti:00 End date 16/06/2018 12:00 <td>Carer V</td>	Carer V
	Medication Prompt -
	Bun
	(None)
	Contract
	Site
	(None)
	(None)
	17 Falling Trans. Wester 40 Alexander Care Frank
C This week 11/06/2018 ▼ C Upto w/e 24/06/2018 ▼	C This week & beyond 31/12/2099 28/05/2018
	P1510 <u>S</u> ave <u>C</u> ancel

Calls allocated to different sites can remain unallocated if the **Site call must be allocated** box is left unchecked.

Site	
The second second	-
Site call must be allocated	

The option to leave site calls unallocated enables users to send multiple Clients to care homes/day centres for extended periods without having to allocate Carers to the calls. A Carer could be allocated to just one of the Clients but in reality, could be providing care to a number of Clients at the same time.

A tab has also been added to the Rota screen to enable users to view all Clients and calls for each site type and site. This can be found by:

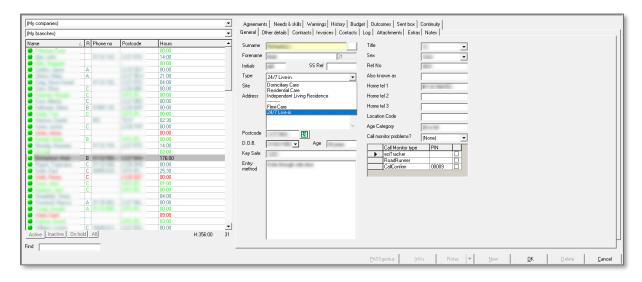
- 1. Opening the Rota
- 2. Clicking on the **Sites** tab

Run Sites Pencilled In					
Carer Client Day					

24/7 – Live-in Functionality

CareFree includes rostering functionality for organisations that deliver 24/7 live-in care to Clients. 24/7 live-in care packages can be viewed within the planner screen once calls have been added to the Rota.

A Client type of 24/7 live-in must be specified in the Client screen to enable users to create 24/7 live-in calls on a Client Rota.



Adding 24/7 Live-in Calls from the Rota

- 1. Open the Rota
- 2. Right-click on the Rota
- 3. Select Add and delete calls then Add new calls

Add calls for Rupert, Tropicana		×	
Sall details Needs Alerts, Time Critical & Event Notes Expenses and Mile	age	O This day only	
Start date 11/06/2018 08:00 Type Weekly -		O Every day except	
	Carer (None) 💌	Every day	
End date 11/06/2018 20:00		O Weekdays	
Double-up 🗖	Medication (None)	O Weekends	>
	Run	Mon 11 Jun	
	(None)	Tue 12 Jun	
	_	Wed 13 Jun	
		Thu 14 Jun 🦰	
		Fri 15 Jun	
	Site	Sat 16 Jun	
	(None)	Sun 17 Jun	
	Site call must be allocated		
	Override the default role	Contract	-
	(None)	Leeds City Council	_ 3
When changes are made - apply them to			
C This week 11/06/2018 ▼ C Upto w/e 24/06/2018 ▼ .	This week & beyond 31/12/2099 411/06/2018		
	PO	<u>S</u> ave <u>C</u> ancel	

1	Specify the start time and end time of the shift the Carer will do at the
	Clients home.
2	Specify which days this shift needs to be added to
3	Ensure This Week & Beyond is selected to ensure the calls are added
	to every week going forward

You may need to repeat this process if there are numerous shift changes through the day

If the Carer stays at a Clients home for a number of days the start time must be set to 00:00 and the end time set to 23:59 to ensure the block of time appears on the Rota

Adding 24/7 Live-in Calls from the Package Wizard

- 1. Open the Client with 24/7 care
- 2. Go to the Rota drop down button and click Packages

Call Monitor email Details Issued items Letters Medication Messages Packages Popup notes Rotas

The package wizard is explained in greater detail in the Day 1 Training Guide – this section will explain how to add 24/7 Live-in calls through the package wizard

3. Click the pen symbol 2 to the left to highlight the whole row, then right-click and select **Every day**

Every day
Weekdays
Weekends
Mon - Sat
Clear

 Use the times to enter when Carers will be changing shifts. In the example below a Carer will be at the Clients home 8am – 8pm then another Carer will take over from 8pm – 8am

If there are more shift changes than this example, add more rows in the package wizard

٦	мΙ	тI	w	Т	F	s	s	x2	Times	Spans	Call Type	Contract	Need	Medication	Med Time
	0			۲	۲					0	Weekly	Midlands County (24/7 Live-In		
2	•	۲	۲	۲	۲	۲	۲	O	20:00-08:00	1	Weekly	Midlands County (24/7 Live-In		
	0	D	0	0	0	O	O	0	: • :						
	0	2	0	0	0	O	O	O	: • :						
	0	D	Ο	0	0	O	0	O	: • :						
1	0	D	0	0	0	0	0	O	: • :						
1	0	D	0	0	0	O	0	O	: • :						
	0	D	Ο	0	0	O	0	0	1.41						
	0	2	0	0	0	0	0	0	1.41						
	0	D	0	0	0	O	0	O	: • :						
	0	2	Ο	0	0	0	0	0	: • :						
	0	C	0	0	0	0	0	0	0.40						
	0	D	0	0	0	0	0	0	: • :						
	0	C	0	0	0	0	0	0	1.41						
	0	C	0	0	0	0	0	0	0.40						
		D	0	0	0	O	0	O	: • :						

5. Click Create once completed

24/7 Live-in Planners Screen

Once 24/7 Live-in calls have been created using the Rota, it is possible to view overall live-in packages in the planner screen. To get the packages to display in the planner, you must first change specify which Clients you provide 24/7 live-in care for.

1. Open the **Clients** screen

My branches)		•	Needs & s	kills Warnings History Budget Outcome	es Sent box Continuitu Pr	ersonalisation
Name	∠ R Ref	Hours Com 🔺		ther details Contracts Invoices Contacts		
	A	32:00 00:00	Surname		Title	Mrs 👻
	A	00:00 00:00	Forename	Ziggy 10		Female -
, Ziqqy	С	24:30 00:00 00:00 00:00	Initials	SS Ref	Ref No	
-		28:00 03:30 09:13 02:40	Туре	Domiciliary Care	Also known as	
		00:00 00:00	Site	Domiciliary Care	Home tel 1	
	B	00:00 00:00	Address	Residential Care Independent Living Residence	Home tel 2	
		00:00 00:00		 Flexi-Care	Home tel 3	
	A	00:00 00:00		24/7 Live-in	Location Code	
	B	03:30 00:00		✓	Age Category	90+
	C	07:15 00:00	Postcode	8	Call monitor problems?	(None) 🔻
		09:00 00:00 00:00 00:00	D.O.B.	Age Age	Call Monitor type	PIN
	A	20:04 01:20	Key Safe	1005	eziTracker RoadBunner	
		•	Entry method	See security at the front gate	CallConfirm	0010
Active Inactive 0	in noia All	H:390:53 48 C:12:10				
- I			cos	InVu Rotas 🔻 New	ок	Delete Cancel

2. In the general tab change the Type drop-down box to 24/7 Live-in

Once the Client types have been changed and the packages have been added, the 24/7 live-in planner will be available to view.

1. Open the **Planners** screen



2. Select **24/7 Live-in** using the drop-down menu at the top left of the

screen

Planner	•
Planner	
Workflow	
Efficiency	
24/7 Live-in	

24/7 Live-in 💌	Branch	(My	branche	s)		-]						Ē	lome on	y (calls)	🔽 S	how lege	ends							
	Thursd	ay 12 Ju	12018																						Friday
	12 AM	01 AM	02 AM	03 AM	04 AM	05 AM	06 AM	07 AM	08 AM	09 AM	10 AM	11 AM	12 PM	01 PM	02 PM	03 PM	04 PM	05 PM	06 PM	07 PM	08 PM	09 PM	10 PM	11 PM	12 AM
Client	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	00
Azalea, Ziggy			Leo	hardo Di	caprio						N	Vill Ferre												Leonar	lo Dicap
															-										
	<	ш																							
Carers Service Users		Away op			QA o																				

- 3. Ensure the option to view **Calls** is selected in the drop-down menu at the bottom left of the screen
- 4. Use the **Refresh** button at the bottom right of the screen to refresh the data

The Planner screen is explained in more detail on <u>page 47</u> of this training guide.

Capacity Planner Screen

The Capacity Planner screen is available to assist with planning and helps decision making when considering whether or not a new Client/care package can be accommodated with current workloads. To open the Capacity Planner

- 1. Go to the View menu
- 2. Click Capacity Planner

The classification of low, medium and high capacity can be changed by altering the values in the boxes at the top of the screen.

Carefree	•	North	Week 09/07/201	8 ▼ ≑ Mon Low 3	→ Med 5 → 🔽 Wa	rking hours 🔽 Home	
	9 Monday	10 Tuesday	11 Wednesday	12 Thursday	13 Friday	14 Saturday	15 Sunday
					-		
07 <u>°</u>	04:00 - 8 Carers	03:30 - 7 Carers	03:30 - 7 Carers	03:30 - 7 Carers	02:30 - 5 Carers	01:30 - 3 Carers	01:00 - 2 Carers
00.00	03:30 - 7 Carers	03:00 - 6 Carers	03:00 - 6 Carers	03:00 - 6 Carers	02:00 - 4 Carers	01:00 - 2 Carers	00:30 - 1 Carer
08 <u>°°</u>	04:30 - 9 Carers 04:30 - 9 Carers	04:00 - 8 Carers	03:30 - 7 Carers 03:30 - 7 Carers	04:00 - 8 Carers	02:30 - 5 Carers	02:00 - 4 Carers	01:00 - 2 Carers
00.00		04:00 - 8 Carers 03:30 - 7 Carers	03:30 - 7 Carers	04:00 - 8 Carers 03:30 - 7 Carers	02:30 - 5 Carers 03:00 - 6 Carers	02:00 - 4 Carers	01:00 - 2 Carers
09 <u>°</u>	04:00 - 8 Carers	03:30 - 7 Carers		03:30 - 7 Carers		02:00 - 4 Carers	01:00 - 2 Carers
10 00	04:00 - 8 Carers	04:00 - 8 Carers	03:00 - 6 Carers 03:30 - 7 Carers	04:00 - 8 Carers	02:30 - 5 Carers	02:30 - 5 Carers 02:30 - 5 Carers	01:00 - 2 Carers 01:30 - 3 Carers
10	04:00 - 8 Carers	03:30 - 7 Carers	03:30 - 7 Carers	03:30 - 7 Carers	03:00 - 6 Carers	02:30 - 5 Carers	02:00 - 4 Carers
11 00	04:00 - 8 Carers	03:00 - 6 Carers	02:00 - 4 Carers	02:30 - 5 Carers			
<u>n-</u>	03:30 - 7 Carers	03:00 - 6 Carers	01:30 - 3 Carers	02:00 - 4 Carers			
1200	04:00 - 8 Carers	03:30 - 7 Carers	01:30 - 3 Carers	02:00 - 4 Carers			
12_	04:00 - 8 Carers	04:30 - 9 Carers	04:00 - 8 Carers	04:00 - 8 Carers	03:30 - 7 Carers	01:30 - 3 Carers	02:00 - 4 Carers
1300	04:30 - 9 Carers	04:30 - 9 Carers	04:30 - 9 Carers	05:00 - 10 Carers	04:00 - 8 Carers	02:30 - 5 Carers	02:30 - 5 Carers
13_	04:00 - 8 Carers	04:00 - 8 Carers	04:00 - 8 Carers	04:30 - 9 Carers	04:00 - 8 Carers	03:00 - 6 Carers	03:00 - 6 Carers
14 00	04:30 - 9 Carers	04:30 - 9 Carers	04:30 - 9 Carers	05:00 - 10 Carers	04:30 - 9 Carers	03:00 - 6 Carers	03:00 - 6 Carers
"	05:00 - 10 Carers	05:00 - 10 Carers	05:00 - 10 Carers	05:30 - 11 Carers	05:00 - 10 Carers	03:00 - 6 Carers	03:00 - 6 Carers
1500	03:30 - 7 Carers	04:00 - 8 Carers	03:30 - 7 Carers	04:00 - 8 Carers	03:30 - 7 Carers	03:00 - 6 Carers	03:00 - 6 Carers
··•_	04:00 - 8 Carers	04:30 - 9 Carers	04:00 - 8 Carers	04:30 - 9 Carers	04:00 - 8 Carers	03:00 - 6 Carers	03:00 - 6 Carers
1600	04:00 - 8 Carers	04:00 - 8 Carers	03:30 - 7 Carers	04:00 - 8 Carers	04:00 - 8 Carers	03:00 - 6 Carers	03:00 - 6 Carers
	04:30 - 9 Carers	04:30 - 9 Carers	04:00 - 8 Carers	04:30 - 9 Carers	04:30 - 9 Carers	03:00 - 6 Carers	03:00 - 6 Carers
17 00	03:30 - 7 Carers	03:30 - 7 Carers	03:00 - 6 Carers	03:30 - 7 Carers	03:30 - 7 Carers	02:30 - 5 Carers	03:00 - 6 Carers
	03:30 - 7 Carers	03:30 - 7 Carers	03:00 - 6 Carers	03:30 - 7 Carers	03:30 - 7 Carers	02:30 - 5 Carers	03:00 - 6 Carers
1800	02:00 - 4 Carers	02:00 - 4 Carers	01:30 - 3 Carers	01:30 - 3 Carers	02:00 - 4 Carers	02:30 - 5 Carers	03:00 - 6 Carers
_	02:00 - 4 Carers	02:30 - 5 Carers	01:30 - 3 Carers	02:00 - 4 Carers	02:00 - 4 Carers	01:30 - 3 Carers	02:00 - 4 Carers
1900	01:30 - 3 Carers	01:30 - 3 Carers	01:00 - 2 Carers	01:00 - 2 Carers	01:30 - 3 Carers	02:00 - 4 Carers	02:30 - 5 Carers
_	01:30 - 3 Carers	01:30 - 3 Carers	01:00 - 2 Carers	01:00 - 2 Carers	01:30 - 3 Carers	02:00 - 4 Carers	02:30 - 5 Carers
20 00	01:30 - 3 Carers	01:30 - 3 Carers	01:00 - 2 Carers	01:00 - 2 Carers	01:30 - 3 Carers	02:00 - 4 Carers	02:30 - 5 Carers
_	01:30 - 3 Carers 💎	01:30 - 3 Carers	01:00 - 2 Carers 💎	01:00 - 2 Carers 💎	01:30 - 3 Carers 🛛 🔍	02:00 - 4 Carers	02:30 - 5 Carers

Users can choose display the capacity planner based purely on the number of Carers not currently allocated to calls at a specific time or can opt to include Carer working hours if these have been specified within CareFree. Select or de-select the working hours tick box to change the view.

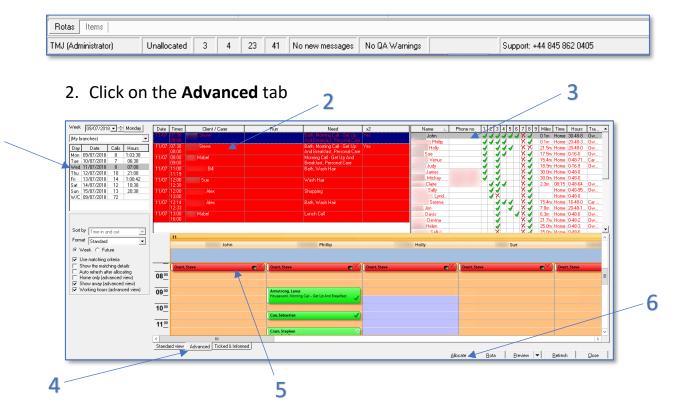
More on the Unallocated Screen

In addition to the standard view of the unallocated screen which we looked at during day 1 of our training, there are several extra views/screens which can provide further insights and assistance when attempting to cover unallocated calls.

Advanced View

The advanced view of the unallocated screen enables a coordinator to see how an unallocated call would fit into their Carers current Rota and provides access to the matching criteria data from the call allocation screen.

1. Double click **Unallocated** in the status bar at the bottom of the screen



1	Select a week and day to view unallocated calls for
2	Click an unallocated call in the list to highlight it and begin looking for a suitable
	Carer
3	The advanced view allows you to see CareFree's matching criteria here
4	Click on the advanced tab to open this view of unallocated calls
5	The red call is the one you are trying to allocate. See how it fits into your Carers
	existing Rotas here
6	When you have decided who will cover the call click the Carers name in the list
	then click Allocate

1

Ticked & Informed Tab

This allows users to tick if the Client or family have been informed of a new Carer being allocated to a call. It is also possible to override the original start time with an amended one.

- 1. Double click on **Unallocated** in the status bar at the bottom of the screen
- 2. Click on the Ticked & Informed tab

Week 09/07/2018 - Monday			Original	Amended					Client	Family
		Date	Original time	Amended time	Unavailable Carer	Carer allocated	Client Name	Client Tel No	informed	informed
(My branches)	►	11/07	07:30	07:30			Steve			
Day Date Calls Hours		11/07	07:30	07:30			Steve			
Mon 09/07/2018 8 1:03:38		11/07	08:00	08:00			Mabel			
Tue 10/07/2018 7 06:38		11/07	11:00	11:00			Bill			
Wed 11/07/2018 8 07:08		11/07	12:00	12:00			. Sue			
Thu 12/07/2018 10 21:08 Fri 13/07/2018 14 1:00:42			12:00	12:00			Alex			
Sat 14/07/2018 12 10:38			12:14	12:14			Alex			
Sun 15/07/2018 13 20:38			13:00	13:00			Mabel			
W/C 09/07/2018 72					I					
Format Standard										
	Sta	andard vi	ew Adva	inced Ticke	ed & Informed					

3. Tick **Client Informed** and/or **Family Informed** if changes have been made to the call. This is recorded in the call details

Alerts & Time Critical	Event details			
Time critical No 🗸 Locked No 🗸	Actual times	•		
No show alert No 🚽 minutes 0	Duration	00:00		
No show alert No 🔽 minutes 0	Job Code			
Nogoalent No 🖵 minutes 🛛	Work Code			
	Unknown client	Yes		
No stay alert No 💌 minutes 🛛	Manual time entry	No		
Lead carer No 👻	Site Mismatch	No		
	AutoLogout	No		
Agreement ID	Unexpected call	No		
	Uses unknown site	No		
Preferred times 12:00 to 13:00	Uses unknown CLI	No		
Client informed - Yes	Uses site mismatch	No		
Family informed - Yes	Event ID			
(897A2BFD-C439-4FE0-81A, 1484B56DF60)	Changed reason			
	Changed by			
hen changes are made - apply them to				

Tracking Requests for Cover

The unallocated screen also provides the option to tick which Carers have been contacted about covering a call from within the standard view tab.

- 1. Open the Unallocated screen
- 2. Click into the **Carer** column then use the drop-down arrow to track cover

	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 Uj			Yes
	11/07	12:00	13:00			Morley Run	Morning Call - Get LL			Yes

3. Use the tick boxes in the **Called?** column to mark off the Carers who have been contacted to request cover

Carer	Phone No	Away	DBS	Transport	Called?
(None)	·		·	·	
			Yes	Own car	
				Own car	
					🗹 Yes
			Yes	Own car	
				Walking	
			Yes	Own car	🗹 Yes
				Own car	
				Skatebo	🗹 Yes
				Own car	
				Own car	
				Hover Car	🗹 Yes
				Own car	
				Own car	
				Own car	
				Own car	
			Yes	Train	

Pencilling 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		Sector Sector Sector		24/7 Live-In	-	1000	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 Uj			Yes
	11,07	10.00	10.00			Madau Dun	Manning Call, Caklly			Ver

4. The same screen will appear, as it does when you are tracking cover for calls. This will not allocate the call to the Carer but will attach them to the call ready for confirmation

Once a Carer has been pencilled in to a call, they are then confirmed from the Rota screen.

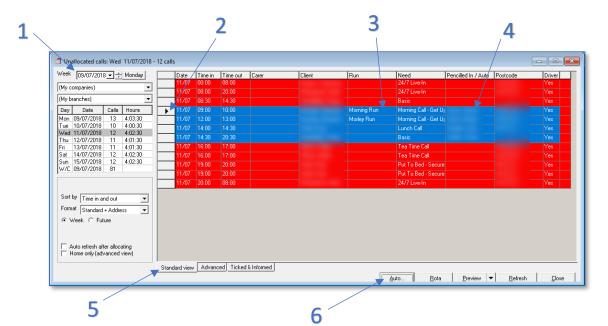
- 1. Open the Rota screen
- 2. Go to the Pencilled in tab

						ŧ							
My branches)		- I		Date 27/02	Time in 11:30		Original Carer	Pencilled in Carer		Service Food Preparation, Ho	 		
All categories)			-	20102		11200		Loneconcern Revi	e Trelawney, Systi	Food Prepeation, Ho.			
Day of week	Date	Calls											
londay	24/02/2014	0											
uesday	25/02/2014	0											
(ednesday	26/02/2014	0											
iursday	27/02/2014	1											
iday	28/02/2014	0											
iturday	01/03/2014	0											
unday	02/03/2014	0											
eek.comm	24/02/2014	1											

- 3. Select the call you wish to confirm
- 4. Click the **Confirm** button to confirm the allocation of the Carer

Auto Allocate Carers

The auto allocation function will pencil in Carers for unallocated calls, based on the 9 matching criteria within the CareFree rostering system. When auto allocating, Carers are only pencilled in allowing users to check the suggestions made by CareFree and either accept or reject the recommended allocations.



Open the **Unallocated** screen and select the **Standard** view tab

1	Use the date controls to locate the calls you wish to auto allocate
2	To select a single call to auto allocate click I the box to the left of the date. Use the CTRL button to select multiple calls
2	
3	Selected calls are highlighted in blue
4	The suggested Carers will appear in the Pencilled In / Auto column
5	Ensure the Standard view tab is selected
6	Click the Auto button to auto allocate Carers to calls

To confirm the allocation of Carers who have been auto allocated follow the same process for confirming pencilled in Carers described in the previous section of this guide.

Holidays

Holiday Entitlements

It is possible to specify whether holiday entitlements are calculated in hours or days within the CareFree options and settings.

- 1. Go to the Tools menu
- 2. Go to Options & Settings and select Shared Options in the submenu
- 3. Select **Employment & Holidays** in the list on the left-hand side of the screen
- 4. In the options for holidays select **Show holiday as** and set it to either days or hours using the drop-down menu

Shared options						
🔄 Rotas and Rostering	Bank holiday default x	2				
Rotas	Public holiday default x	2				
Rostering	Late timesheets	4				
External links	Maximum hours	48				
🔄 Invoices, wages & exports	Monthly capped hours	0				
Invoices	Start-finish break time	90				
Wages	🖻 Minimum wage					
Employment & holidays	Minimum pay per hour	£7.83				
Exports	Waiting time for shift breaks	90				
🔄 Call monitoring, SMS & Email	Include travel time in shift breaks					
Call monitoring	Automatically add top-ups					
SMS and alerts Email	Top up expense type	Minimum Wage Compliance Top Up				
L mail Mileage	Holidays					
Security & flavour Security Flavour Help & support	Holiday options	 ✓ Show holiday entitlement ✓ Calculate annual leave Keep holiday call detail Exclude sick from wages Use Eire BH & sick rules Always use 'taken' value for away reports ✓ Use new holiday entitlement calculated daily Use dates as the default taken value Replace holiday weaks with weaks from start of year Always use the guide value for calculations 				
	Show holidays as	Days 🚽				
	Holiday fund %	Days				
	Holiday calc %	Hours				
	Holiday division	52.00				
	Holiday weeks UK	13				
	Holiday weeks Eire	13				
	Holiday year starts from	January				
	Holiday calculator	Standard				
	Holiday pay expense type	v				
	Show holidays as Choose between days or hours whe	an displaying holiday values				
		Collapse all Apply DK Close				

Deducting Holidays Taken from Entitlements

There are two main ways in which holidays can be deducted from a Carers entitlement.

Using the Carers Holidays Tab

- 1. Open the Carers screen
- 2. Go to the Carer who is taking holiday
- 3. Click on the Holidays tab
- 4. Click Edit
- 5. Right-click in the white box
- 6. Select New

🗼 Carer: Carol (20)	
(My companies) (My branches)	General Other details Qualifications Wages Security Branches Log Attachments Extras Notes Contacts Holidays Payroll Outcomes Sent box Planner History Continuity
Name ∠ Phone no Postcode	Holiday Entitlement Working days you wish to use in the calculation Guide days based on the last 13 weeks in CareFree 1.38 Current holiday entitlement from January 2018 (5 days x 5.6) 28
	Holidays taken this year 0.00 Balance remaining 28
	From date To date ▼ Entitlement Taken Left
Active Inactive On hold All 56:00	20 PASSgenius InVu Rotas ▼ New QK Delete Cancel

7. Ensure the Holiday radio button is selected

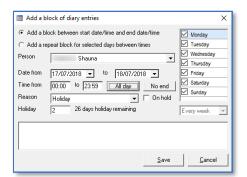
📑 Holidays	×
From date To date I Holidays	18/07/2018 00:00 All day 19/07/2018 23:59 No end C Entitlement
Total taken Reason	0 Holiday On hold
	Save Cancel

- 8. Fill in the details for the holiday, specifying the from and to date, the number of hours/days to be deducted in the **Total Taken**
- 9. Using the Reason drop-down box choose 'Holiday' then click Save
- 10. The holiday will be deducted from the entitlement and an away period will be added to the Carers Rota

Adding an Away Period on the Rota

Use <u>page 8</u> of this guide for best instructions on how to add an away period via the Rota. Ensure that you add the following information when adding the away period.

1. Using the Reason drop-down box choose 'Holiday'



2. Deduct the correct number of hours/days of holiday from the Carers entitlement

Holiday Pay Calculator

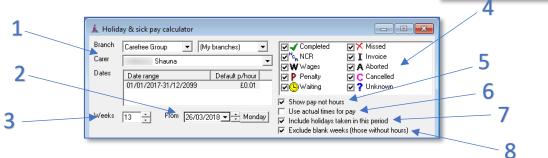
The holiday calculator enables users to see the average amount of hours or pay

a Carer has earned over a specific time period. It can also be used to add pay as an adjustment to Carer wages based on the calculation it performs.

Using the Holiday Pay Calculator

1. Open the Tools menu and select Holiday Calculator





1	Select the relevant branch and Carer
2	Select the date from which the calculation will be made
3	Set the number of weeks to calculate average pay/hour over. The default is set to
	13 as this tends to be the most common working practice
4	Tick the relevant call statuses to include into the calculation
5	Tick Show pay not hours to show the average pay of each day/week, untick this
	box to show average hours of each day/week
6	Tick Use actual times for pay to look at actual times rather than planned
7	Tick Include holidays taken in this period to include annual leave that has been
	taken by the Carer in the date period selected
8	Tick Exclude blank weeks (those without hours) to exclude any weeks within the
	selected date period where no hours have been worked by the Carer

2. Click Calculate to start the holiday pay calculation

C<u>a</u>lculate

There must be some finalised wage sheets in the Carers records for the Holiday Pay Calculator to work out the calculation

The following calculation has been worked out with pay instead of hours. If the calculation is worked out with hours the principal is the same the calculation will show hours instead of currency.

	🗼 Holiday 8	& sick pay calcula	tor							• 💌	
	Branch 🖸	arefree Group	▼ Muh	ranches)	_	V Ca	moleted		Missed		
	Carer			- anone e,		NO NO			Invoice		
	1	Shauna			-	WW		٨	Aborted		
)ate range		Default p/ł		🔽 P Pe	nalty	C C	Cancelled		
	0	1/01/2017-31/12/2	2099	£(0.01	I∎⊕w	aiting	☑ ?	Unknown		
						Show	pay not ho	Ire			
						-	ctual times				
	Weeks 13	B From	26/03/201	8 - 1 ÷ 1	/londay	P	e holidays I		is period		
1						-	-		e without ho	ours)	2
L 🔨		ek Date		Tue	Wed	Thu	Fri	Sat	Sun		/ 3
	Wee	01/01/2018	Mon	17.00	wea	25.50	17.00	30.45	30.45	Total 120.40	
	2	08/01/2018	17.00	17.00	17.00	20.00	25.50	26.10	26.10	111.70	
	3	15/01/2018		17.00		25.50	17.00	30.45	30.45	120.40	
	4	22/01/2018	17.00		17.00		25.50	26.10	26.10	111.70	
	5	29/01/2018		17.00		25.50	17.00	30.45	30.45	120.40	
2	6	05/02/2018	17.00		17.00		25.50	26.10	26.10	111.70	
2	7	12/02/2018	47.00	17.00	47.00	25.50	17.00	30.45	30.45	120.40	7
	8	19/02/2018	17.00	21.25	17.00	20.75	25.50	26.10	26.10 34.80	111.70	
	9	26/02/2018	4.25	21.25	4.25 17.00	29.75	21.25 25.50	34.80 26.10	26.10	150.35 111.70	
	11	12/03/2018	4.25	21.25	6.38		23.30	20.10	20.10	31.88	
	12	19/03/2018	17.00	21.20	17.00		25.50	26.10	26.10	111.70	
										0.00	
											/ 5
		Total hours									
		Average pay	8.50	8.50	8.66	10.13	18.63	24.09	24.09	102.62	
		Hours / Days	0.00								
					alculate	Mag	jes	<u>P</u> review	_	<u>C</u> lose	

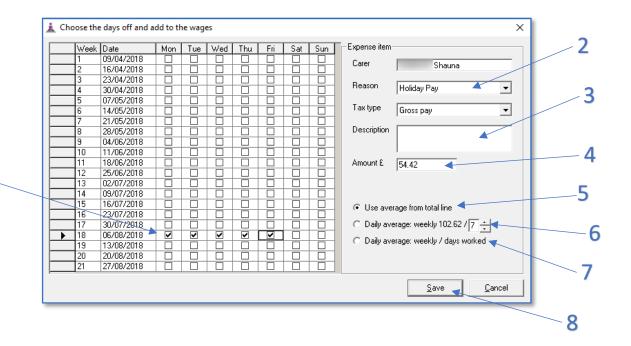
1	Each week included into the calculation is displayed here
2	The calculation will work out how much the Carer has earned/worked on each day,
	which is displayed here
3	The total number of hours/pay for that week is calculated at the end of the table
	showing how much the Carer has earned/worked
4	The total number of hours/pay on each day of the week (Mon-Sun) are worked out
	to display the average pay/hours
5	The totals of the week's hours/pay are calculated to display the average pay/hours
	over the 12 weeks

Adding Holiday Pay/Sick Pay to a Wage Sheet

If the holiday pay calculator is being used for holiday pay and/or sick pay the following option can be used to add the pay to the Carers wage sheet.

Click the **Wages** button to add an expense to the Carers wage sheet.

Wages...



1	Tick which days the Carer will not be working where they will be paid
2	Use the Reason drop-down box to choose what expense reason will appear on the
	Carers wage sheet
3	Use the Description free text box to enter any additional information in about this
	expense
4	The amount will be calculated when you select a date. This will change depending
	on what option you set underneath
5	Use the average from total line will use the average totals from each day. Looking
	back on the screenshot from page 38 at point 4 each average for Mon-Fri was
	added up giving a total of £54.42
6	Daily average: weekly 102.62 / 7: This setting is working out what the Carer has
	earnt on a daily basis by taking the average weekly pay of 102.62 (calculated in the
	previous screen) then dividing this by the number of days worked (this number can
	be amended). In this example 102.62 / 7 is £14.66. As 5 days have been ticked the
	total would work out as £73.30 (£14.66 * 5)
7	Daily average: weekly / days worked: This setting is similar to the previous option
	but the number of days worked out is worked out automatically
8	Click Save to add the expense to the Carers wage sheet for the dates you have
	selected on point 1. The expenses will appear in additions and adjustments

1

Linking to Documents, Policies & Procedures

CareFree provides the option to link to your organisations guidance documents, procedures or policies in various places throughout the database. These links are designed to assist employees when dealing with issues which require a set process to be followed.

For example, if a complaint is received which needs recording as a log entry in a Client record. It is possible, to create a quick link to your complaints procedure document to provide appropriate guidance for the co-ordinator creating the log. Once the link has been created the co-ordinator can click the icon in the log entry screen to access the complaints procedure document.

🎁 Conta	ct log record		_		×				
Date	12/07/2018 11:37								
Owner	Shauna								
Caller		12/07/2018 💌	Status	Open	-				
Туре	(None)	-	Admini	strators only					
Category	(None)	-	Show	on portals					
Linked to a	nother Client	(None)			-				
Linked to a	nother Carer	(None)			•				
For a speci	fic user name	(All users)			-				
Details									
Outcome	Outcome								
Lessons Le	Lessons Learned								
Attachmen									
Descriptio	Description Folder or location								
Creat	e a new workflow using	(None)	_		-				
Resol	ved _/_/ 🗹 Du	ue on <u>/_/_</u>	ave	<u>C</u> ano	el				

The process of creating links to documents, policies and procedures involves two stages:

- Specifying document types
- Configuring the links

Specifying Document Types

First you must specify what type of documents you wish to add into CareFree. You can create document types via the Items screen:

- 1. Open the Items screen
- 2. Go to the **Document types** list
- 3. Click **New** to add or edit to update the list of document types. Think what documents you would like to provide quick access to throughout the system. Press **Ok** to save any changes

🕼 Items			
Discounts Employment types End destinations End reasons End reasons Ethnic groups Accident / Incident Procedure Care Plan Consent General Risk Assessment Induction Documents Medication Assessment Moving and Handling Assessment Training Guides	- Document Name	types	2
Find		<u>N</u> ew <u>E</u> dit	<u>D</u> elete <u>C</u> lose

Configuring the Links

With the Document types created in the Items screen, it is possible to specify the way the links will work within CareFree. To do this:

- 1. Go to the Personnel menu and click Documents & Policies
- 2. You will be presented with a list of your document types

ocument	File name
- Accident / Incident Procedure	
– Care Plan	
- Complaints Procedure	
- Consent	
– General Risk Assessment	
- Induction Documents	
 Medication Assessment 	
 Moving and Handling Assessment 	
 Training Guides 	

3. Right click on the screen and select **New** to begin creating your links using the document item window

👜 Docume	ent item X			_ 1
File name	T:\CareFree\Training Material\Pre Course Documents\New Training Agendas\V			2
Туре	Complaints Procedure			2
Name	Complaints Procedure	-	3	
Description	This is the official company document to follow when logging a complaint from a custo			
Contact log				4
QA type				
	<u>S</u> ave <u>Cancel</u>	-	5	

1	Click on the magnifying glass to browse your computer network and
	find the document you wish to create a link to
2	Select the Document Type
3	Give the document an appropriate name and/or description
4	Select which area of CareFree this document will be linked to. Select
	either QA or the Contact Log drop down
5	Click Save to add to the document and create the link

By adding a document from a shared drive this will allow all other users/machines who have access to the shared drive to have access to this document. If the document is attached locally only that machine and user will be able to access the document

Workflow

Workflows in CareFree are fully customisable checklists which can be used to easily track processes with defined stages. The stages must be signed off or completed, for the overall process to reach a conclusion. Workflows are often created in CareFree for processes such as:

- Tracking the recruitment of Carers
- Tracking Client referrals
- Following a formal complaints procedure
- Carer inductions

There are 3 steps involved in creating and using workflows:

- Creating a workflow
- Attaching the workflow to a Client or Carer
- Tracking workflow progress

Creating a Workflow

To create a workflow, you will need to give it a name and specify the stages which will make up the process as a whole:

1. Go to the **Personnel** menu and select **Workflows**

	Personnel	Reports	Letters	Window	He
	QA So	Ctrl+J	K		
	Docur				
Í	Workf				

2. Ensure the Edit Workflow radio button is selected and click New

Name	Auto-add	Stage	Description	Days	Option
Accidents Procedure	Î	1	Inform Carer to finish remainder of call and come into the office	1	No
Complaints Procedure					
DBS Workflow		2	Ask Carer to sign accident book	1	No
New Clients				-	
New Starters	Yes	3	Ask Carer to inform GP	5	No
Recruitment			Ask Carer to speak with HR	0	No
l raining	Yes	P .	Ask Caler to speak with Hh	0	NU

- 3. Give the workflow an appropriate name
- Tick Automatically add to new Carers for the workflow to attach to new Carer records automatically
- 5. Click Save

🖌 Wo	rkflow Name	×				
Name	Recruitment					
Automatically add to new carers						
	Save	<u>C</u> ancel				

- 6. The radio button will move from Edit Workflow to Stages as soon as the new workflow is created
 C Edit workflow © Stages
- 7. Click **New** to add the first stage to the workflow
- <u>N</u>ew
- 8. Complete the details for the workflow stage

	₩ Workflow stage ×	
1	Stage 1 Description Retrieve references	3
2	Days 5 Optional No Source Clients	4
	Letter	5
	<u>Save</u> <u>C</u> ancel	

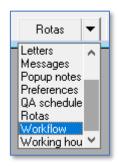
1	Give the stage an appropriate Description
2	Specify the number of Days the stage should be completed in from the start date of the
	workflow before it is classified as overdue
3	If the stage isn't a mandatory part of the overall workflow choose Yes in the Optional
	drop-down menu
4	Users can send mail merge letters to recipients as each stage of a workflow is completed.
	To set up mail merge, choose the contact type you would like to send the letter to in the
	Source drop-down box and select the letter template in the Letter drop-down box
5	Click Save

9. Repeat this process for all stages of the workflow until completed

Change the stage number when adding a new stage to re-order stages if a stage has been missed

Attaching Workflows to a Client or Carer

- 1. Open the Clients or Carers screen
- 2. Go to Workflow in the Rotas Drop Down Menu



3. Use the lists on the left-hand side of the screen to go to the Client or Carer you wish to attach the workflow to

(My companies)			companies) 🔽 Stage Details Notes Days Started		Started	Status			
My branches)		-							
Name	Phone no	Postcode							
indexe. Theree									
the second second									
Carlos Annas									
And the second second		1100.000							
Collector State									
Collector Control									
Carrier Carrier									
Property President									
and the second second									
- Barren Transf									
- Barris Sarage			1						
- Second probability			1						
officers, Prog.									
		•							
Carer Client	V 4	ctive only							

- 4. Click New
- Use the drop-down box
 Workflow type to choose the workflow you want to attach the Carer/Client

😿 Workflow it	tem		×
Owner	Carol		
Workflow type	Recruitment		•
Start date	25/10/2017 -	🔲 No start date	
		<u>S</u> ave	<u>C</u> lose

- Select the Start Date for the workflow, if there is no start date tick No Start Date
- 7. Click Save to attach the workflow to the Carer/Client

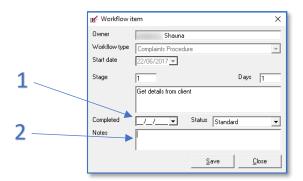
Tracking Workflow Progress

Once a workflow has been attached to a Carer or Client, it will be visible within the workflow screen.

Applic- Equal 3 Teleph	witment salion form screened copportunity monitoring form received and data securely stored hone interview prompt sheet	Looks promising All details checked	1	16/09/2014	
Equal Teleph	opportunity monitoring form received and data securely stored		1	17/09/2014	
B Telepł		All details checked		1170072014	Completed
	hone interview prompt sheet		1	18/09/2014	Completed
Invite			3	21/09/2014	
	to interview letter sent out and documents to bring with you list		0	21/09/2014	
i Recrui	uitment checklist created and linked		7	28/09/2014	
6 Intervi	iew questions and scoring list - REC006		0	28/09/2014	
' Right t	to work in the UK docs checked - REC016/REC017		0	28/09/2014	
B Passp	port expiry date		0	28/09/2014	
) Visa e:	expiry date		0	28/09/2014	
0 CRB d	document check list printed out - CRB Check list		0	28/09/2014	
1 Check RECO	k CRB documents needed and copy candidate documents - 119/REC020/REC021		0	28/09/2014	

It is possible to complete stages within the workflow and track progress using the workflow screen.

- 1. Open the Clients or Carers screen
- 2. Navigate to workflow in the Rotas drop down menu
- 3. Locate the Client or Carer who is engaged in the workflow
- 4. Double click on the stage of the workflow you wish to complete



1	Enter the date the stage was completed
2	Add any notes then click Save

A more user-friendly way of tracking Workflow progress is available within the Planner screen in CareFree and this will be explained on <u>page 49</u> of this training guide.

Planners Screen

The Planners screen in CareFree provides an overview of current business activity and enables users to identify peaks and troughs in resource allocation. There are four different planners within CareFree and we will look at each in turn.

1. To open the Planners screen, click on the Planners icon



2. To select a planner to view, use the **drop-down** menu in the top left corner of the screen

Planner 💌	
Planner Workflow Efficiency 24/7 Live-in	

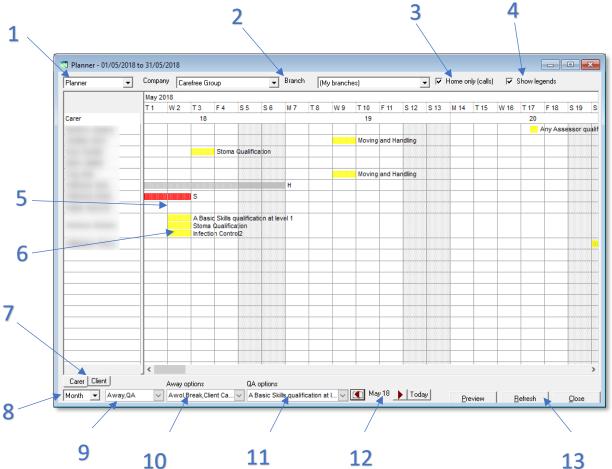
How the Planner Can Be Used

There are a variety of ways the Planner can be useful to co-ordinators. A number of examples are listed below:

- Overlay the calls and working hours Planners to identify appropriate gaps in Carer working patterns when trying to accommodate/allocate new Clients/care packages
- Use the QA Planner to keep a track of planned training and assessments on a weekly/monthly basis
- Overlay QA and call planners to ensure there are no conflicts
- Use the away planner and filter by away reason to view Carer sickness patterns or view holidays booked

Planner

The main CareFree Planner provides a calendar style overview of activities relating to both Clients and Carers. Data can be filtered according to a variety of criteria.



1	Select the Planner view in the drop-down
2	Filter data by company and branch
3	Select to view the data from the home branch only
4	Show legends displays a description against data on the Planner
5	Planner data is displayed here
6	A single click on any of the planner blocks will reveal further detail. Double clicking on
	away periods, QA schedules, and calls will open full detail windows
7	Select to display data for Client or Carers
8	Use the drop-down menu to select the time period you wish to view data for
9	Use the second drop-down menu to choose the data to display in the Planner (QA, calls,
	away periods, working hours)
10	If an away period is selected use the Away Options drop-down menu to select which away
	periods you wish to view
11	If a QA is selected use the QA Options drop-down menu to select which QA's you wish you
	view
12	Select the date you wish to view data for
13	Click Refresh to update the Planner screen after changing options

Workflow Planner

As mentioned in the previous section on workflow, the workflow Planner presents a more user-friendly way of tracking workflow progress in CareFree.

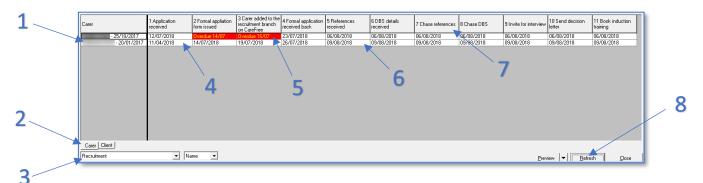
1. Click on the **Planners** icon



2. Select **Workflow** using the drop-down menu in the top left corner of the screen

Planner	•
Planner Workflow	
Efficiency	
24/7 Live-in	

- 3. Use the Workflow Planner to complete stages within a workflow for Carers and Clients
- 4. **Double click** on the stage you wish to complete and enter a completion date



List of Clients or Carers who are engaged in the workflow

White indicates a stage is complete or it hasn't reached its due date

Choose to view workflows for Clients or Carers

Red indicates a stage is overdue

Select the workflow type you wish to view data for

Double-click on a stage to enter a completion date Workflow stages are listed across the top of the screen Use the **Refresh** button to refresh data on the screen

2

49

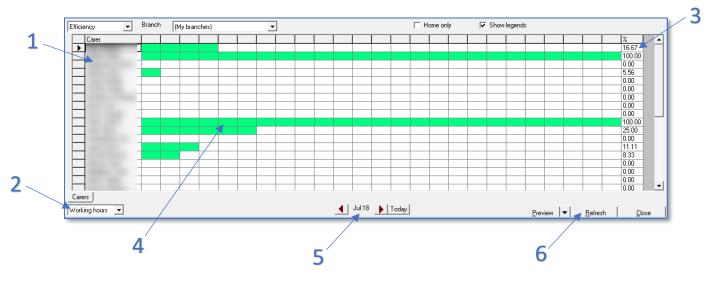
Efficiency Planner

The efficiency planner shows the percentage of hours a Carer has been allocated compared to their available hours.

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 of the screen
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 call and their last call)
3	The percentage of efficiency is displayed at the end of each Carers row
	here
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

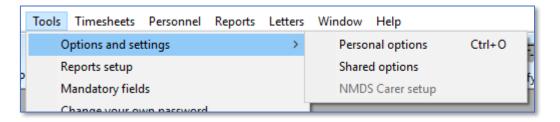
Preferences and Options

It is possible to change both personal user options and shared system options within CareFree.

- Settings changed can be reversed
- Be aware whether the change you are making affects you, or all users of the system

Accessing Options & Settings

- 1. Open the Tools menu
- 2. Go to Options & Settings
- 3. Select the required option from Personal Options or Shared Options



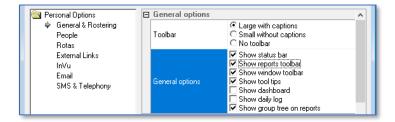
Commonly Used Options & Settings

Below is a list of the most commonly amended settings within the system.

Reports Toolbar

This option allows you to store your most commonly used reports at the bottom of every screen for ease of access. To use the reports toolbar, it must first be activated. To activate the toolbar.

- 1. Open the Tools menu
- 2. Go to Options & Settings
- 3. Select Personal Options
- 4. Place a tick in the box next to **Show reports toolbar** which can be found under **General Options**
- 5. Click **Apply** to save changes



6. Once activated you will see the report toolbar displayed at the bottom of your screen



Create a Link to a Frequently Used Report

- 1. Open the Reports screen
- 2. Select the appropriate report group in the box at the top left of the screen
- 3. Click and drag the name of the report down onto the report toolbar



4. To remove the report right-click Report Menu and remove the report in question



Showing Mobile Numbers on Lists

This option will show your Carer mobile numbers on the list of Carers in CareFree and on the Rota.

- 1. Open the Tools menu
- 2. Go to Options & Settings
- 3. Select Personal Options
- 4. Select **People** in the list on the left-hand side of the screen

Personal Options		
🔄 Personal Options	Client options	A
General & Rostering ♥ People Rotas External Links InVu Email SMS & Telephony	Defaults	 ✓ Convert names to proper case Show reference number on list ✓ Show home number on list ✓ Show hostcode on list ✓ Show initials on list ✓ Show onitisioned hours on list ✓ Show detail hours for current week ✓ Show tota hours for current week ✓ Warn if duplicate summare is refreted ✓ Show forename then surname where possible ✓ Show in step on list ✓ Show is the possible
	Carer options	
	Defaults	 ✓ Convert names to proper case Show reference number on list ✓ Show postcode on list ✓ Show postcode on list ✓ Show notiated hours on list ✓ Show detail hours for current week ✓ Show rota hours for current week ✓ Warn if duplicate sumame is entered ✓ Show forename then suname where possible ✓ Highlight when hours below contracted ✓ Enforce UK National Insurance format
	Duplicate NI No.	Allow duplicate but warn first
	Client options	
		Collapse all Apply QK Cancel

- 5. Place a tick in the box next to **Show mobile number on lists** which can be found in **Carer Options**
- 6. Click Apply to save the changes
- 7. There is also an option to **Show home number on lists** in the **Client Options** on this screen

Allow Dragging and Dropping of Calls

This option allows users to turn on and off the drag and drop function when working in the Rota screen. Whilst drag and drop can be useful, some organisations prefer to limit access to the functionality to reduce the chance of errors occurring.

- 1. Open the Tools menu
- 2. Navigate to Options & Settings
- 3. Select Personal Options
- 4. Select General & Rostering in the list on the left-hand side of the screen
- 5. Scroll down to the options for the Rostering and Rota Screen
- 6. Either tick or untick the option to Allow dragging and dropping of calls
- 7. Click **Apply** to save the changes

Personal Options		
Personal Options General & Rostering	Mapping	Google Maps Microsoft MapPoint
People	Google Maps	Use the browser to display maps
External Links	Excel exports	Excel US dates
InVu	Messages and alerts	
Email	Check for messages	0
SMS & Telephony	Check for notifications	0
	Alerts sound	
	Messages sound	
	Alert screen	🔽 Modal screen
	Inbox	Popup for new messages
	Rostering and Rota scr	een
	Options Highlight by contract type	 ✓ Use matching criteria for rostering ✓ Show carer working hours on rota ✓ Calculate the distance between calls Show call details using italic font ✓ Red borders for 'This week & beyond' ✓ Allow dragging and dropping of calls ✓ Highlight name if any calls are unallocated Use the split screen as the default ✓ Show status icon on the calls ✓ Show driver icon on the calls
	Options	
	Options for rostering calls and r	ota screen views
,		
		Collapse all Apply <u>O</u> K <u>C</u> ancel

Red Borders for This Week and Beyond

This option helps to highlight when users are making changes which affect the whole care package by selecting **This Week & Beyond** in the Rota screen.

- 1. Open the Tools menu
- 2. Navigate to Options & Settings
- 3. Select Personal Options
- 4. Select General & Rostering in the list on the left-hand side of the screen
- 5. Scroll down to the options for the Rostering and Rota Screen
- 6. Either tick or untick the option to Red borders for this week & beyond
- 7. Click **Apply** to save the changes

I Personal Options		
Personal Options General & Rostering	Mapping	Google Maps Microsoft MapPoint
People Rotas	Google Maps	Use the browser to display maps Use the directions API for distances
External Links	Excel exports	Excel US dates
In∀u	Messages and alerts	
Email	Check for messages	0
SMS & Telephony	Check for notifications	0
	Alerts sound	
	Messages sound	
	Alert screen	Modal screen
	Inbox	Popup for new messages
	Rostering and Rota set	creen
	Options Highlight by contract type	 ✓ Use matching criteria for rostering ✓ Show carer working hours on rota ✓ Calculate the distance between calls Show call details using italic font ✓ Red borders for 'This week & beyond' ✓ Allow dragging and dropping of calls ✓ Highlight name if any calls are unallocated Use the split screen as the default ✓ Show status icon on the calls ✓ Show driver icon on the calls
	Options Options for rostering calls and	d rota screen views
,		
		Collapse all Apply <u>QK</u> <u>C</u> ancel

Rostering Warnings

There are numerous warnings which can be triggered in CareFree to warn users where allocating a Call to a particular Carer, which may result in a conflict, or would contravene preferences which had been set for the Client/Carer. To access and change these Rostering Warnings:

- 1. Open the Tools menu
- 2. Navigate to Options & Settings
- 3. Select Shared Options
- 4. Select Rostering in the list on the left-hand side of the screen
- 5. Select which warnings you would like to activate in the Warnings box
- 6. Click **Apply** to save the changes

🗟 Rotas and Rostering 📃 Unallocat	ed calls	,
Rotas Rotaring External links Invoices, wages & exports	 □ Print blank lines at end □ Show PINs on the report □ Show darker colour if no run assigned □ Show darker colour if allocated but no run 	
Invoices Warnings Wages Employment & holidays Exports Call monitoring, SMS & Email Call monitoring SMS and alerts Email Mileage Security & flavour	Warn if call length is changed from original Warn if skill set doesn't match Warn if genders don't match (as set by the Need) Warn if allocating meets any exclusion reasons Warn if allocating is outside of working hours Warn if allocating means exceeding max hours Warn if changes are made for this week & beyond Warn if changing times of a double-up call Warn if changing the day of a call Warn if changing the day of a call Warn if multiple contracts exist when adding calls Warn if workflow security is not comoleted	

Please note that these are global (shared) settings so any changes you make will affect other CareFree users in your organisation

Verification

Using CareFree to help manage the delivery of care to your Clients should follow a step by step process from using the Rota to planning your care calls, through to invoicing your Clients and paying your Carers. The verify screen fits in between these two processes and provides a simple interface for managing what is actually happening out in the field as your Carers visit your Clients.

The Rota is what we use to plan the delivery of care for our Clients Verify is where we manage exceptions and make adjustments for what has happened out in the field All this data is fed into the pay and charge rules to help produce invoices and wages in reports

Using the Verify Screen

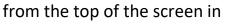
The Verify screen is used to manage any situation where what was planned on the Rota is not what was actually delivered by the Carer out in the field.

Variations from what was originally planned through to what was actually delivered can occur for a variety of reasons and it is important to ensure that the Verify screen is used to ensure that the correct data is fed through into the pay and charge rules to generate accurate invoices and wages.

The way in which the verify screen works varies depending upon whether your organisation is using Electronic Call Monitoring (ECM) or if you manually monitor care delivery.

¥≡. Verify

To view the Verification screen. Press ¹ CareFree.



1			/	2	3	4				
Branch (My branches)	27/08/2018 -	Hon +	120 min -	30 min < 5 M	TWTFSS		IWA	N P	C	A 7
Name ∠ Phone no Hours ▲	Day	Times	Dur ∠	Client	Contract	Need	Away	· · ·		
00:00	Mon 27 Aug	15:30-16:00	00:30	and the second second		Personal Care		1		
65:34	Tue 28 Aug	15:30-16:00	00:30			Personal Care		4		_
00:00	Wed 29 Aug	15:30-16:00	00:30			Personal Care		1	-	_
00:00	Thu 30 Aug	15:30-16:00	00:30			Personal Care		1		_
06:00	Fri 31 Aug	15:30-16:00	00:30	-		Personal Care		1		
00:00	Sat 01 Sep	15:30-16:00	00:30			Personal Care		1		
Laura 35:00	Sun 02 Sep	15:30-16:00	00:30			Personal Care		-		
09:00	Mon 27 Aug	10:30-11:30	01:00			Morning Call - Get		1		
60:00	Mon 27 Aug	12:00-13:00	01:00			Lunch Call		4		
00:00	Mon 27 Aug	16:30-17:30	01:00			Housework		\checkmark		
49:00	Tue 28 Aug	10:30-11:30	01:00			Morning Call - Get		1		
00:00	Tue 28 Aug	2:00-13:00	01:00			Lunch Call		-		
00:00	Tue 28 Aug	16:30-17:30	01:00	and there a		Housework		1		
Carers Clients Day 337:34 , Run Sites	Planned 35:00		Call	s 35 NCR 0 (00:	:00)					
Find					R <u>e</u> fresh	Preview -	Bota			Close
5	6			7						

1	Use the date control to navigate to the week of the calls you wish to
	verify
2	Use filter buttons to include/exclude call where planned & actual times
	exceeded specific parameters
3	Use the filter buttons to either include or exclude data for specific days
	of the week
4	Use the filter buttons to include/exclude calls with specific call statuses
5	Users can choose to view verify data by Carer, Client or for individual
	days of the week
6	Double-click on an individual call to view more detailed information
7	Click Refresh to update the screen when parameters have been
	changed

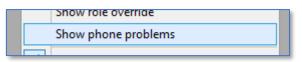
It is possible to view more than two weeks ahead in the Verify screen. A column is also available to view the screen which shows Clients Phone Problems.

To view this column:

• Click on the **Verify** icon to open the Verify screen



- Right-click in the verify screen
- Select Show Phone Problems



Call Status

The status of a call in the Verify screen will determine what information is fed into Invoicing and Wages. A brief description of each call status is provided below:

Call Completed

- 🖌
- The call has been completed as planned on the Rota
- For organisations who don't use ECM, we recommend setting the default status of all calls to Completed when creating Contracts
- For organisation who use ECM, the status of a call will change to completed if a Carer logs in and out at the call within set tolerances of the planned start and end time
- Completed calls will be picked up for both Invoicing and Wages

Missed Call

- 🗙
- The call has not taken place as planned on the Rota
- For organisations who don't use ECM, a coordinator may need to go into Verify and apply Missed as an override status to a call if a Carer failed to complete a call
- For organisations who use ECM, a call will register as Missed in the Verify screen if a Carer does not log into a call within a set tolerance period on the planned start time on the Rota
 - Alerts can be triggered for coordinators in CareFree when calls are missed
 - If a Carer has simply forgotten to log in/out at a call, a coordinator can apply an override status of Completed

No Call Required

- NCR
- The call has been cancelled on the Rota and a Carer is no longer required to attend
- The call will have been cancelled by a coordinator adding an Away Period to the Clients Rota
 - Adding Away Periods to specific calls, or adding Away Blocks between dates will result in calls appearing with the status NCR in Verify
- NCR calls will not be picked up for Invoicing & Wages
 - It is necessary to apply an override status to an NCR call if a Client has cancelled their call without providing sufficient notice and you wish to charge them for the call, and/or pay the Carer

Invoice Only

- · I
- Calls marked as Invoice Only will not be picked up in Carer Wages runs, but will appear in Invoicing for Clients

Wages Only

- W
- Calls marked as Wages Only will not be picked up in Client Invoice runs, but will appear in Wages for Carers

Aborted, Penalty & Cancelled Calls

- APC
- Aborted, Penalty and Cancelled are all call statuses which can be tailored by users to feed specific data into Invoicing and Wages. This will depend on the business rules, terms and conditions your organisation has adopted
- The method for changing the rules behind Aborted, Penalty and Cancelled Calls is covered in detail at the end of this section

Unexpected Call

- ?
- An Unexpected call will be generated in Verify when a call which has not been planned on the Rota occurs
- Unexpected calls are only generated when ECM is in use
- A common reason for an Unexpected call appearing is where Carers agree to swap calls without notifying the coordinator
 - In this situation, the original (planned) call will register as Missed in Verify and the call completed by the wrong Carer will appear with the status set to Unexpected
 - $\circ~$ It is possible to match up and fix these calls in the Verify screen

Call Status & Override Status

All calls will be assigned a status in the Verify screen. For organisations with ECM, the default status of all calls should be call waiting until a call is either completed or missed by a Carer logging in and out within a specific time period. For organisations without ECM, the default status of calls is set when creating contracts (this is explained in our Day 1 Training guide).

It is possible to apply an override status to any call in the verify screen, when the assigned status is incorrect or will feed inaccurate information into Invoices and Wages. The most common reasons for applying an override status are:

- Carers forgetting to log in/out of calls where ECM is used, resulting in completed calls registering as missed
- Calls which are cancelled by Clients which still require some level of charge/payment to be levied

All calls will be assigned a status in the verify screen. This will appear in the **S** column

An override status can be applied to calls, in situations where the assigned status will not feed the necessary information into Invoicing & Wages. If an override status is applied, it will appear in the **O** column.

Once the verification process has been completed, calls can be locked to prevent further changes. If a call is locked, a padlock will appear in the **L** column

S

0

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Ρ

С

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Applying an Override Status to a Single Call

There are several methods which can be used to apply an override status to a call:

- 1. **Double-click** on the call in the Verify screen
- 2. Select the override status using the drop-down menu
- 3. Click Save

<u>Or</u>

Double-click in the override status column on the call to cycle through the override statuses until you reach the one you require

<u>Or</u>

- 1. Select the call in the Verify screen
- 2. Right click and select Set Call Status
- 3. Select the override status required in the sub-menu

			Intelligence in the
	Set call status	+	Set all as done
-	Filter by call status	•	Set all as missed
	Lock	•	Set all as no call required
_	Driver	•	Set all as invoice only
_	Set variation reason	•	Set all as wages only
	Show actual times and duration		Set all as aborted
\checkmark	Show the away reasons		Set all as penalty
	Show the exceptions		Set all as cancelled
	Show the variations		Clear override status

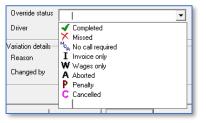
Applying an Override Status to Multiple Calls

It is possible to quickly apply the same override status to a batch of calls:

- 1. Select the first call and hold down the CTRL key on the keyboard
- 2. Select the other calls by left clicking on them. The selected calls will turn grey

111021-20	22.00 00.00	10.00		maianas county council	2401 LING III	
Fri 28 Sep	08:00-15:00	07:00		Midlands County Council	24/7 Live-In	1
Fri 28 Sep	15:00-22:00	07:00		Midlands County Council	24/7 Live-In	1
Fri 28-29	22:00-08:00	10:00		Midlands County Council	24/7 Live-In	1
Sat 29 Sep	08:00-15:00	07:00		Midlands County Council	24/7 Live-In	1
Sat 29 Sep	15:00-22:00	07:00	 	Midlands County Council	24/7 Live-In	1

- 3. Right-click and select Set Call Status
- 4. Choose the override status required in the sub-menu



Changing Call Details Using Verify

A range of information relating to a call can be changed from within the Verify screen:

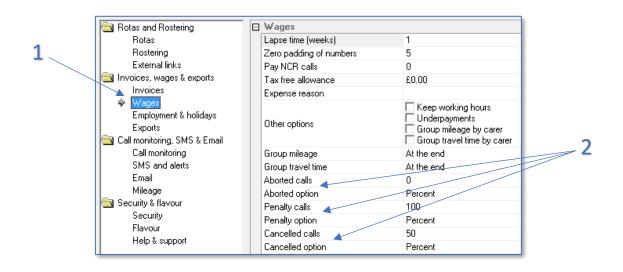
	🛤 View event for Mon 24 Sep 🗙	1
	Call details Needs Supplementary data Notes Expenses	2
1	Call details	-3
-	Date of call Mon 24 Sep 💌 Copy times	
	Planned times 08:00 to 15:00 Duration 07:00	
	Actual times to Duration 00:00	
	Client name	
	Actual carer	
	Original carer	
	Contract Midlands County Council	
	Run (None) 💌	
	Call status 🧹 Completed	
	Override status	
2	Driver Yes Adjust: P 0.00 C 0.00	4
-	Variation details	
	Reason (None)	
	Changed by	
	Previous Next Save Cancel	

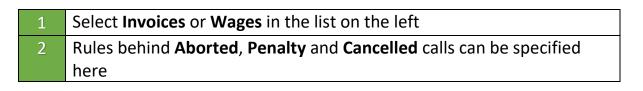
1	Actual Times will automatically be populated when the Carer logs in
	and out of the call if the organisation use ECM. These times can be
	completed/edited by a coordinator if required
2	Change the Drive status of the Carer here for mileage payments
3	Needs and Expenses can be edited/added to call from within the
	Verify screen if required
4	A Variation Reason can be added to explain why changes have been
	made to call details in the Verify screen. A variation reason list can be
	amended in the Items screen

Setting Options for Aborted, Penalty & Cancelled Calls

By default, Aborted, Penalty & Cancelled Calls will not be picked up in Invoicing and Wages. The statuses were created to give organisations sufficient flexibility to accommodate unique cancellation terms and business rules. To alter the rules for Aborted, Penalty & Cancelled Calls:

- 1. Open the Tools menu
- 2. Navigate to Options & Settings and select Shared Options
- 3. To set the rules governing Customer charges select **Invoices** in the list on the left
- 4. To set the rules governing Carer wages, select **Wages** in the list on the left





Aborted, Penalty and Cancelled Call Setup Scenario

For demonstration purposes, our scenario presumes the following business rules exist:

- If a call is cancelled with less than 24 hours' notice, the Client will be charged and the Carer will be paid 100% of their costs /wages
- If a call is cancelled with less than 48 hours' notice, the Client will be charged and the Carer will be paid 50% of their costs/wages
- If a call is cancelled with more than 48 hours' notice, there will be no charges or payments to Clients/Carers

In this scenario, it is important to remember that regardless of how much notice is given, all cancelled calls will appear in Verify with the status NCR (No Call Required). This happens once the coordinator has cancelled them using an Away Period on the Client Rota. As NCR calls are not picked up for Invoicing and Wages, we will need to change the status of the calls where a Client gave less than 24 hours', or 48 hours' notice to ensure that the correct charge and pay information is fed through into Invoicing and Wages. To do this we would recommend the following:

- 1. Open the Tools menu
- 2. Go to Options & Settings and select Shared Options
- 3. Select Invoices in the list on the left
- 4. Change the **Penalty Calls** value to 100 and change the **Penalty Option** from **Minutes** to **Percent**
- 5. Change the **Cancelled Calls** value to 50 and change the **Penalty Option** from **Minutes** to **Percent**
- 6. Then select **Wages** in the list on the left and make the same changes

We can now use the call Override Status **Penalty** on any NCR calls in verify where a Client gave less than 24 hours' notice, and can use the **Cancelled** status where a Client gave less than 48 hours' notice.

Using Away Reasons to Cancel Calls

It often helps to pick up the cancelled calls which need an override status applying in the Verify screen if appropriate away reasons have been added in the Items screen. In our example scenario, a coordinator may wish to have 3 away reasons for when a Client cancels a call:

- Client Cancelled
- Client Cancelled 24hr
- Client Cancelled 48hr

To add or edit away reasons:

- 1. Open the Items screen
- 2. Go to the Away Reasons list in the box at the top left
- 3. Click New to add new items to the list

Away Reasons can be displayed in the verify screen to allow coordinators to quickly identify the calls which need an override status applying.

-	Need	Away	S	0	L	Г
i	24/7 Live-In		-			
il	24/7 Live-In		1			
il	24/7 Live-In	Client cancelled	NC _R	Ρ	A	
il	24/7 Live-In	Client cancelled	N _C	Ρ	A	
il	24/7 Live-In	Client cancelled	NC _R	С	ð	
il	24/7 Live-In	Client cancelled	NC _R	С	ð	
	04.211					

Using QA

QA is used in CareFree to schedule events such as training courses, assessments, spot checks and meetings etc for both Clients and Carers. It is possible to display QA's which have been scheduled on a Client or Carers Rota and QA events can be configured so that they automatically re-schedule refresher events after the appropriate time period has elapsed.

Creating & Editing QA Types in the Items Screen

Before creating schedules for your Carers or Clients, we recommend spending some time updating the information relating to QA in the Items screen.

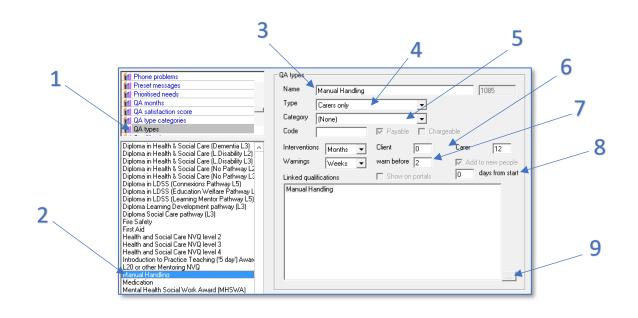
The QA types list contains all the training courses and assessment types you might wish to schedule for your Carers and Clients. You may wish to create QA Types to schedule regular checks of Carer driving licences/insurance details, or to plan regular staff meetings.

1. Open the Items screen



2. Go to **QA Types** in the box at the top left of the screen

📊 QA type categories	1
M QA types	
M Qualifications	
M Recent concerns	
📶 Recruitment sources	1
📶 Religions	
📶 Risk areas 📃 👻	ŀ
<i>4</i>	-



1	Select QA Types from the Items list
2	Select a QA type and click Edit to amend its properties. If the QA type
	that is required is not there click New
3	Choose an appropriate Name for the QA type
4	Can the QA type be scheduled for Carers or Clients or both groups?
5	Category and Code relate to NMDS data uploads
6	Specify how often the QA type needs to be scheduled for by entering a
	number in Clients or Carer. Then select weeks or months in the
	interventions drop down box
7	Specify how close to the schedule date you want a QA warning to
	appear. This warning appears at the bottom of the
	CareFree menu when the QA is due
8	Tick Add to new people if this QA needs to be added to new
	Clients/Carers. Type in how many days after their start date that the
	QA would be need to be scheduled in for
9	Use this box to link the QA type to a qualification. The qualifications
	list can be configured in the Items list

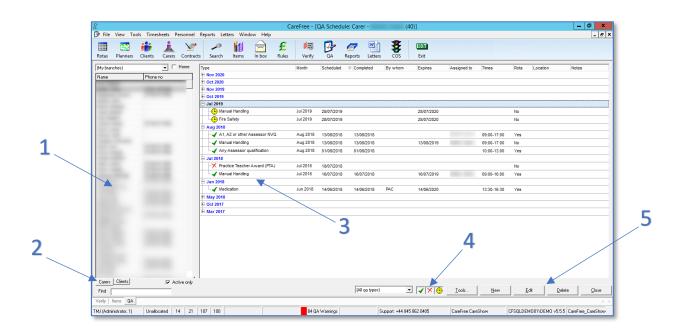
Linking QA to Qualifications

It is possible to link QA Types with Qualifications. Once this link has been made, the Qualifications tab in the Carer screen will automatically be updated when QA schedules are completed for Carers. Before linking QA Types to Qualifications, you may wish to update the Qualifications list in the Items screen.

Scheduling QA for Carers & Clients



1. Open the **QA screen** by clicking on the QA icon



1	Select an individual Carer or Client to display their QA schedule
2	Use the tabs to display QA for either Carers or Clients
3	Scheduled, completed and missed QA items for each Carer and Client
	are displayed here
4	Filter the list to display on specific QA types here. Use buttons to
	show/hide QA by status
5	Use the New button to create a new QA schedule. Use the Edit or
	double-click on a QA to amend an existing QA schedule

1. Click New to create a new QA schedule

1	₽	New entry		x	1
▲	Schedule details-				
	Scheduled type	Manual Handling		- 🔤 📘	_ 3
2	Scheduled month	October 💌	Scheduled year 2018 -		
2	Scheduled on	☑ 12/10/2018 ▼			
	Completed on		By whom		
	Responded on		C Accredited		4
	Location		1		- ·
	Venue	(None)		-	
	Learning type	(None)		•	
	Satisfaction score	(None)		-	<u> </u>
6	QA ID				-
	Rota details				
7	Assigned to		•		
/		09:00 ^{to} 16:00	🔽 Show on rota		
	Owner				
				 ₩5⊊	9
0				<u> </u>	
δ					
		N N	New Log Save C	ancel	

1	Select the QA type you wish to schedule
2	Select the month and year for the QA schedule
3	Place a tick next to Scheduled On to specify the date the QA will occur.
	If the exact date is not yet known the system will default to the 1 st of
	the month
4	Use the Location field to manually input a location or pre-populate the
	Venue list in the items screen to pick frequently used venues and allow
	mileage calculations
5	Populate the items list for Learning Types (e.g. e-learning, classroom)
	and Satisfaction Scores (the score would be given by the attendee)
6	To assign another Carer as the trainer or assessor for the QA, pick their
	name in the drop-down list here. The QA will also then appear on their
	Rota
7	Add Planned Times and add a tick to Show On Rota to make the QA
	appear on the Rota (keep spot checks hidden!)
8	Click New Log to create a log against the QA
9	Click Save to schedule the QA item

Completing Scheduled QA Items

Once an assessment or training course has been completed, it is important to ensure that the QA schedule is updated.

To complete a scheduled QA item:

- 1. Open the **QA Screen** by clicking on the QA icon
- 2. Go to the Carer or Client who has completed the QA
- 3. Double-click on the QA schedule that requires completion

	2	X	
	₿		
	Schedule details-		
4	Scheduled type	Manual Handling 🗸 📹	2
1	Scheduled month	August Scheduled year 2018	<u> </u>
	Scheduled on	▼ 13/08/2018 ▼	
	Completed on	▼ 13/08/2018 ▼ By whom Lyndsay Williamson	
	Responded on	▼ 01/09/2018 ▼	
2	Location	Wakefield	
2	Venue	Carefree Offices	
	Learning type	Classroom Training	
	Satisfaction score	Very Good	
	QA ID	{F88F68A8-C6DA-4503-A8DA-9EF8323979DE}	
	Rota details		
	Assigned to	· · · · · · · · · · · · · · · · · · ·	
	Planned times	09:00 to 17:00 🗆 Show on rota	
	Owner		
	1	<u> </u>	
		ABC-	
		New Log Save Cancel	

1	Place a tick in Completed On and specify the date on which the QA
	was actually completed
2	Add the name of the person who is signing off the QA in By Whom
3	Responded On is a space to log an additional date if tracking is
	required i.e. sending certificates

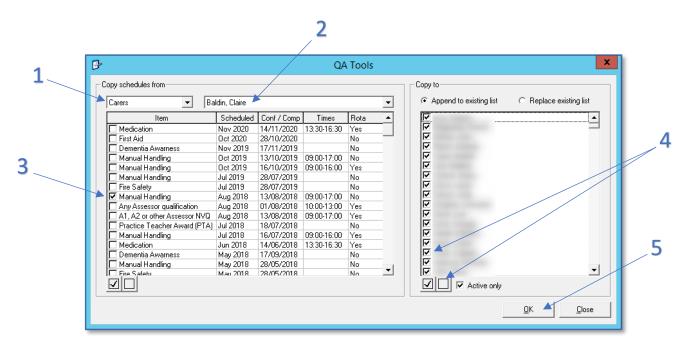
- 4. If you are completing a QA schedule which has been created with a specific intervention period in the Items screen, the following warning when will appearing when saving the QA
- 5. Click **Yes** if you would like CareFree to add a new schedule for when the QA is next due to be repeated

	Automatically create the next entry			
2	The next intervention for this schedule type is 12 months			
\checkmark	Do you want CareFree to create the next entry automatically?			
	Based on the Completed date, the next date is Oct 2019			

Copying QA Schedules to Multiple Carers

It is possible to copy the same QA schedule to multiple Carers. This is useful when arranging a training course or a meeting which several Carers will attend at the same time.

- 1. Open the QA Screen
- Create the QA schedule for one Carer by following the steps listed on page 71
- 3. Click on the Tools button



1	Choose to copy the schedules from either Carers or Clients	
2	Use the drop-down menu to locate the Carer/Client for whom the QA	
	was scheduled	
3	Place a tick next to the QA schedule you wish to copy	
4	Tick the Carers/Clients that require a copy of the QA schedule to. The	
	two boxes at the bottom of this list are used to tick or untick	
	all Carers/Clients	
5	Click OK to copy	

Reports

The Reports screen is where you would go in CareFree to get specific data out of the database.

The Reports Screen

The Reports screen always works in the same way, regardless of the type of Report you wish to output. Once you have mastered running an individual Report, you will be able to apply your knowledge to use all the Reports within the database. To open the Reports screen:

1.	Click on the R	eports icon	C Reports	_	
		3	4	5	
1	Service delivery Clients Carers / Staff Main Carers Invoices Wages Business Electronic Monitoring Analysis and statistics CQC & RQIA Others Your custom reports	Date options	eks 03/09/2018 to eks 17/09/2018 to : 24/09/2018 to h 01/09/2018 to	30/09/2018 30/09/2018 30/09/2018 07/10/2018	rules Status Branches
2	Create and finalise invoices Reprint finalised invoices Payment history Returns & schedules Value by customer Variations	C Periods Week starts on Time range		Invoice frequency Type	Refresh print for list when dates are changed Filter Select all
	Show report descriptions	Duplex		alculate Einalise	Preview V Close

1	Select which group of reports to view using this box
2	There will be multiple reports available within each group – choose the most
	appropriate report
3	Specify a date range using the Choose the dates tab (if applicable)
4	Select people or groups of people to include using the Select from the list tab
5	Use the other tabs to select options and specify parameters which can vary
	depending on which report is being ran
6	Use these drop-down boxes to specify further options, choose reports formats and
	place filters on data
7	Financial reports will need to be calculated before they can be previewed
8	Click Preview to view the report. Use the drop-down menu to see the
	Print/Email/Export options

Using Reports to Generate Carer Rotas

One of the most common reasons to access the Reports screen is to output Carer Rotas. The Rotas can either be printed in hardcopy, or emailed directly to Carers if email addresses and email server details have been stored within CareFree.

- 1. Open the Reports screen
- 2. Select the **Service Delivery** group of reports in the box at the top left
- 3. Select the Rotas and Timesheets report in the box below

	_
🥟 Service delivery	ų
🌌 Clients	
🌌 Carers / Staff	
🏉 Main Carers	
🥭 Invoices	
🏉 Wages	
🏉 Business	
Electronic Monitoring	
🥟 Analysis and statistics	
🏉 CQC & RQIA	
🏉 Others	
Your custom reports	
	_
First time calls	<u> </u>
Full weekly rota	
History of allocation	
Missed calls	
On call report	
Overlapping calls	
Packages of care	1
Rotas and timesheets	
Site attendance	
Time critical calls	
Timesheet checklist	-
Show report descriptions	

4. Ensure the report is set to print for **Carers** with the status set to **Active** in the two drop down menus at the bottom of the report

Print report for		Status	
Carers	•	Active	-

- 5. Use the Choose the dates tab to specify the date range for the Rota
 - a. Use the pre-set date ranges or use the Custom option to specify the date range for complete flexibility
 - b. Choose which day of the week your
 Rota starts on using the Week starts
 on drop down menu
 - c. Use the **Time range** boxes to specify start and end times for the Rota period

0	Next 4 week	08/10/2018	to	04/11/2018
0	Next 2 week	08/10/2018	to	21/10/2018
e	Next week	08/10/2018	to	14/10/2018
0	Next month	01/11/2018	to	30/11/2018
0	This week	01/10/2018	to	07/10/2018
0	Custom	18/06/2018 💌	to	09/07/2018 💌

Week starts on	Monday 💌
Time range	

- 6. Use the **Select from List** tab to choose the Carers for whom you wish to output the Rota to
- 7. You can leave all Carers selected, de-select all or pick individuals from the list

Use the top drop-down menu to select a different format for the Rota – to gain access to other formats go to the Reports Setup. See <u>page 78</u> for more information

~	Recruitment	Active 🔺	Rota & e-mail options
7	North	Active 💻	
	South	Active	Standard
7	North	Active	
7	Recruitment	Active	Show all people
7	Midlands	Active	Use the second drop-down menu to filt
	Recruitment	Active	Phone problems only the list of Carers to show only the peop
1	South	Active	
[North	Active	Cover calls only with email addresses stored in the databa
	North	Active	Print a blank rota This is useful when some Carers accept end
	Midlands	Active	
	South	Active	Show mileage on rotas Rotas and some require a hardcopy
	South	Active	
	Midlands	Active	
	South	Active	

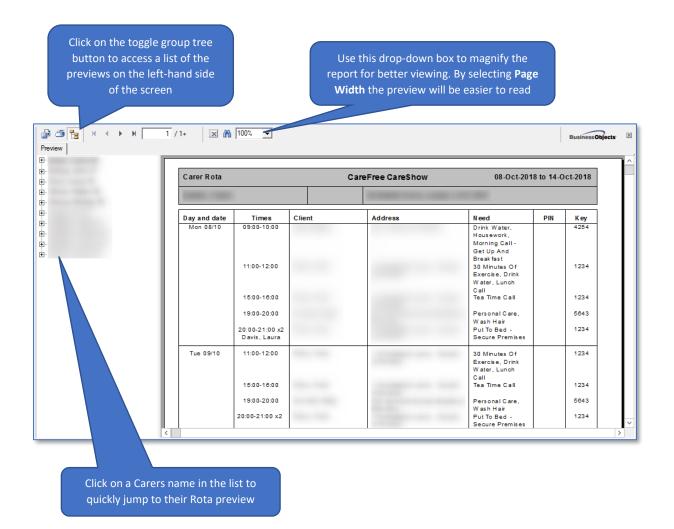
- Use the Status tab to decide which call statuses to include on the Carers Rota
 - a. This allows a decision to include NCR calls on a Rota – showing the Carer that a call has been cancelled

Choose the dates Select from the list	Other options	Planned & actual rules	Status	Branches
Completed				
Missed				
✓ I Invoice				
W Wages				
A Aborted				
P Penalty				
C Cancelled				
✓ 🤤 Waiting ✓ ? Unknown				
Cinknown				
Use actual times for pay				
Use actual times for charging				
Ignore call status when calculating				

- Use the Branches tab to include/exclude specific branches when outputting the data
 - By de-selecting some branches, the list of Carers in the select from list tabs will be altered accordingly

Choose the dates	Select from the list	Other options	Planned & actual rules	Status	Branches
Branches					
Carefree					
- 🖌 Midland	ds				
- 🗸 North					
- 🗹 Recruit	tment				
- ✓ South					
Home branch	only				

- 10. After the relevant selections have been made, click the **Preview** button to view the Rotas on screen
- 11. The report preview screen will open showing the Rota for the first Carer you selected in the list
- 12. Use the arrow buttons to click through the preview for your other Carers



Gain Access to more Report Formats using Reports Setup

Over many years we have created hundreds of bespoke report formats for our Clients in response to their specific organisational requirements. It is possible to browse through the formats we have created to see if any of our existing Rota/Invoice/Wage Sheet/Care Plan/Risk Assessments would suit the needs of your organisation.

- Tools Timesheets Personnel Reports Letters 1. Open the **Tools** menu Options and settings Reports setup 2. Click **Reports Setup** Report name ٠ 🗹 A and L Rota 🔽 A Grade 🗹 A-Best 🗹 A1 Quality 🗹 Abbey Care Carer Rota 🗹 Abbotts Care Use buttons to Able Care AbleWellCare select all format 🗹 AbleWellCarer in the library 🗹 Acme Care 🗹 ACS Care at Home 🗹 Age Concern Calderdale Select the 🗹 Age Concern Cornwall Report Type Age Concern Doncaster 🗹 Age Concern Footcare using this drop-Age Concern Salisbury down menu 🗹 Age UK Dover
 - 3. Once you have selected some new formats and clicked **OK** to save, close the reports screen and re-open to refresh the formats drop-down menu

 \checkmark

<u>о</u>к

Close

Click OK to save

I Age UK Rota I Age UK Xmas I Ainsworth

Carer rotas

•

Туре

4. Go back and try running your Rotas using a different format, using the drop-down menu in the **Select from List** tab

Select from the list Other options Planned & actual rules Status Branches					
n	Recruitment	Active	Rota & e-mail options		
е	North	Active	1		
Dennis	South	Active	Standard		
n	North	Active	Standard ,		
ndo	Recruitment	Active	StarCare.carer		
ah	Midlands	Active	StarCareCarer		
е	Recruitment	Active	Stars Social Support Stepping Stones To Independ		
iny	South	Active	Stepping Stones To Independ		
a	North	Active	StJudesRota		
ý.	North	Active	StJudesRota Live-In		
	Midlando	Activo			

Useful Reports in CareFree

There are over 300 different reports within CareFree. Once you have practiced generating Rotas in reports, it is best practice to access some of the other reports within the database. The reports module is extremely flexible and you should be able to find information relating to virtually any aspect of your business within the system. Listed below are some useful reports with brief descriptions and guidance on locating them.

Report Group	Report Name	Report Descriptionscoo
Service Delivery	Full Weekly Rota	Shows all calls for all Clients and Carers for
		a full week, grouped by day
	On Call Report	Report intended to be used by on-call
		organisers who don't have access to
		CareFree at nights/weekends
	Verification	Hardcopy of the verification screen
		showing full list of calls with statuses
Clients	Birthday List	Quick list of all Clients who have a birthday
		in the near future – can specify how many
		months in advance the report will show
		(also available for Carers)
	Contact Logs	List of all contact logs for all Clients.
		Report can be filtered by contact log type
		and grouped by Client name or log type
		(also available for Carers)
	Keysafe Numbers	All keysafe numbers for all Clients
	QA Schedules	All planned and completed QA items for all
		Clients (also available for Carers)
Invoices	Create & Finalise Invoices	Calculate, preview and then finalise
		Invoices
Wages	Create & Finalise Wages	Calculate, preview and then finalise Wages
Business	Forecast Spend & Revenue	One-page summary showing total care
		hours and net profit. You can enter
		prospective hours to see the effect on cash
		flow
	Profit & Loss	Compares calculated or finalised Invoice
		values with wages to give indicative
		profit/loss figure
Electronic Monitoring	Planned & Actual Times	Simple comparison by Client, Carer or date
		showing planned against actual care time
		delivered
Analysis & Statistics	Client Statistics	Shows the number of Carers, Clients and
		care hours now compared with 12 months
		ago highlighting % increase/decrease
CQC & RQIA	AQAA Dataset	Shows some numerical data relevant to
		the AQAA dataset
	Continuity of Care	Compliance report showing each Client
		with the number of Carers allowed against
		the number actually used
	People Statistics	Statistical report showing people with age,
		gender, ethnicity and start date

CareFree Mail Merges

CareFree has the ability to export a mail merge template, with that template you can then create letters via Microsoft Office or some other compatible desktop publishing application. In this example we will be using Microsoft Office Word.

Once the letter has been created with the correct merge fields, its then possible to import that letter back into CareFree and use the system to create the letters for printing or emailing.

- Letters
- 1. Go to Letters from the top menu bar in CareFree
- 2. To export a merge template, change the **Source** drop down box to export Clients, Carers, Staff etc.

Source	Doctor
Letters	Clients
Labels	Staff Customers Clinic Correspondence Care Of
	District Nurse Doctor

3. When the correct source has been selected tick <u>all</u> sources on the left of the screen

Name	Address	<u> </u>
	_	
<u>-</u>	+	-
	-	-
~	1	and the second second
2		_
<u>×</u>	-	-
<u> </u>	+	-
<u>.</u>	+	

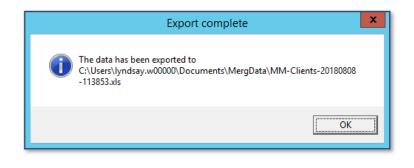
4. Use the

boxes to either tick all or un-tick all items

5. The number of sources in your CareFree depends on how long this export will take. A progress bar will load indicating a visual of completion

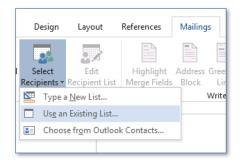


6. A prompt will appear letting you know where the merge export has been saved to

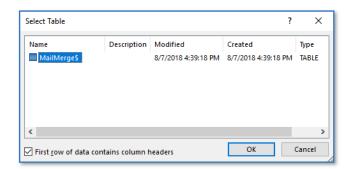


Remember to note down this location as we will need it to create the mail merge document

- 7. Open a new Microsoft Office Word document
- 8. Click into Mailings
- 9. Click into Select Recipients
- 10. Click Use an Existing List...



- 11. This will open your file explorer, locate the document we exported from CareFree
- 12. When found, Word will give us the following prompt

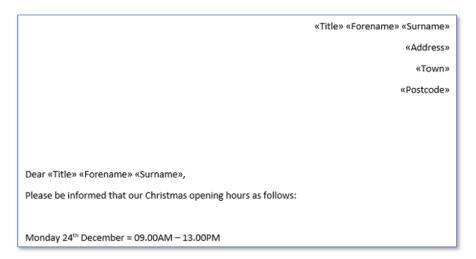


13. Click **OK**

14. In the **Mailings** tab, use the **Insert Merge Field** to enter in what source information you want on the document



15. Write up your letter using the merge fields to fill in the source information



16. If this document would need to used multiple times, i.e. monthly, the document can be saved but ensure the document is saved as a Word Template. Save the word document as usual but in the Save as Type drop-down change this to Word Template

File name:	Christmas Opening Hours.dotx	<
Save as type:	Word Template (*.dotx)	\sim

- 17. To run the mail merge ensure you have the correct merge document open, go to **Mailings**
- 18. Click Finish & Merge
- 19. Choose the most appropriate option, we recommend to **Edit Individual Document** to allow you to check over the merge

	Mailings Review View Help \checkmark Rules \sim Address Greeting Insert Merge s Block Line Field \sim Write & Insert Fields	Tell me what you want to do	Finish & Merge • Edit Individual Documents Print Documents Send Email Messages
20. Ensı	ure All is selected then	click OK	Merge to New Document ? X Merge records Curr <u>e</u> nt record Curr <u>e</u> nt record O <u>F</u> rom: <u>I</u> o: OK Cancel

21. The mail merge will then fill in all the merge fields with the exported information we retrieved from CareFree

	Miss Jayne
Dear Miss Jayne ,	
Please be informed that our Christmas opening hours as follows:	
Monday 24 th December = 09.00AM - 13.00PM	

Each page of the merge will be an individual source allowing each page to be sent individually