



# CareFree Day 3 Training Guide



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Creation Date	Author	Product & Version	Document Version
06/09/2018	Kayleigh Bainbridge	CareFree 5.5	V1
31/01/2019	Lyndsay Williamson	CareFree 5.5.7	V2

# Getting Started with Financial Functions

In addition to the powerful rota and rostering functions, it is possible to use CareFree to manage your organisations invoicing and payroll processes. Invoices and wages can be quickly and efficiently generated, using either planned or actual call durations, from with CareFree's Reports module. Data can also easily be exported for use in numerous commonly used accounting packages. This training guide is designed to help users set up the rules which govern rates of pay and charge and to provide guidance on generating invoices and wages.

## Preparing to Implement Invoicing in CareFree

CareFree allows complete flexibility when specifying the rates your organisation charges for care services. The rates of charge are always linked to a Client contract, so it's important to consider how charges are to be applied when creating contracts. You may find that you need to adjust or alter the contracts you originally created for your Clients when you begin to set up invoicing.

## How Charge Rates Relate to Contracts

When we create a contract in CareFree, we must include the following information:

- **Contract Type**
- **Contract Name**
- **Customer Details**

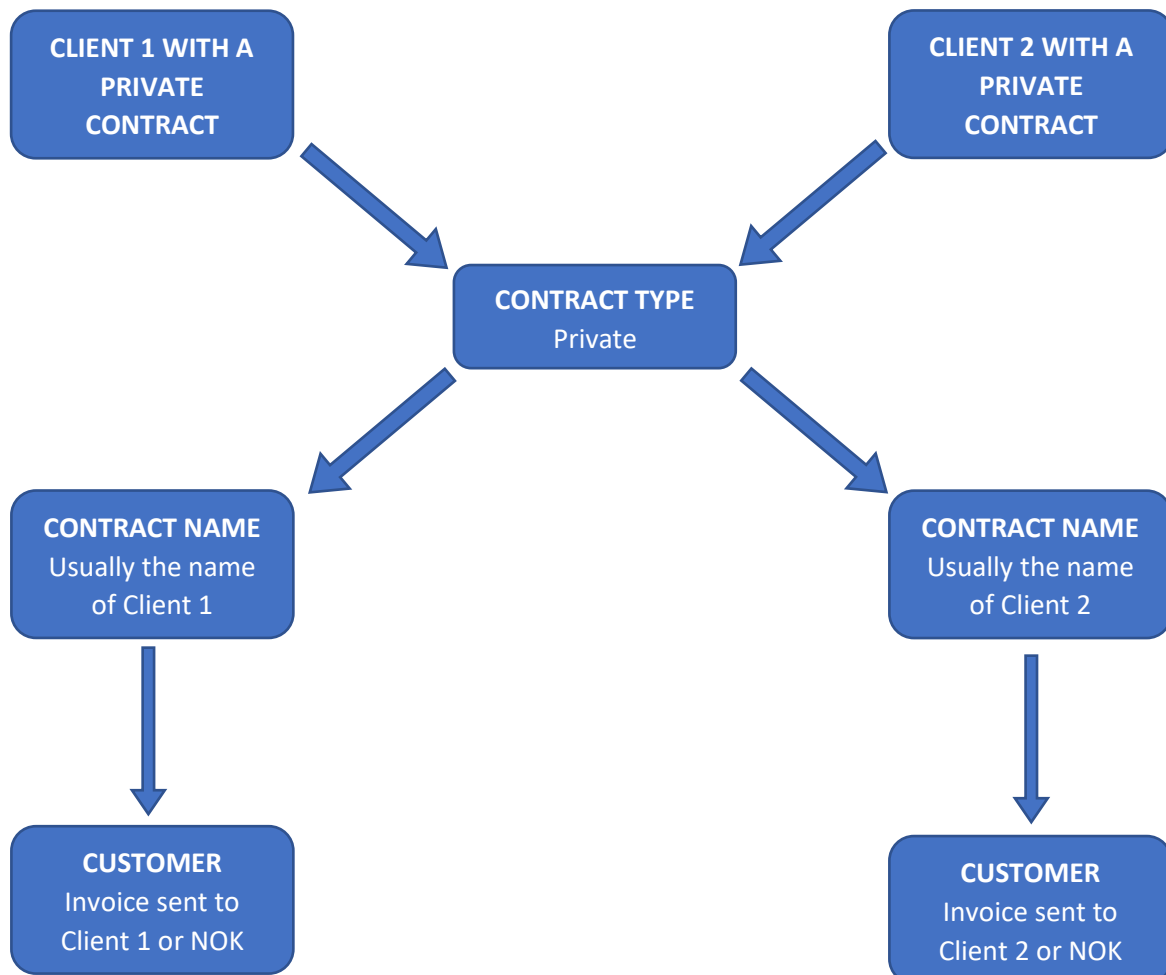
Remember that the Client is the person for whom you are providing care to, but the customer is the person who is paying the invoice. These are sometimes the same people (often for private contracts) but could also be two different people (for social services/NHS contracts).

As we discovered on day one of training, the process for creating contracts differs slightly depending on whether the contract is unique to the Client (e.g. a social services or NHS contract type).

The way in which contracts are created will also depend on how you charge for the care services you provide. CareFree's financial rules can be structured so that blanket charges are applied to all contracts of a specific **Contract Type**, or individual charge rates can be applied to each unique contract.

## Unique Contracts – Private or Direct Payment

A private contract will usually be unique to one specific Client. Often, the Client will also be the customer (i.e. person paying the invoice). Clients can be grouped together under the umbrella of their private contract type, but they will have a unique contract within that grouping. The structure will look like:



If all of your private Clients are charged the same rates, we can apply blanket charges at the contract type level. If they are all charged different rates however, we don't need to worry because each Client will have their own unique contract, to which we can attach their own specific rates.

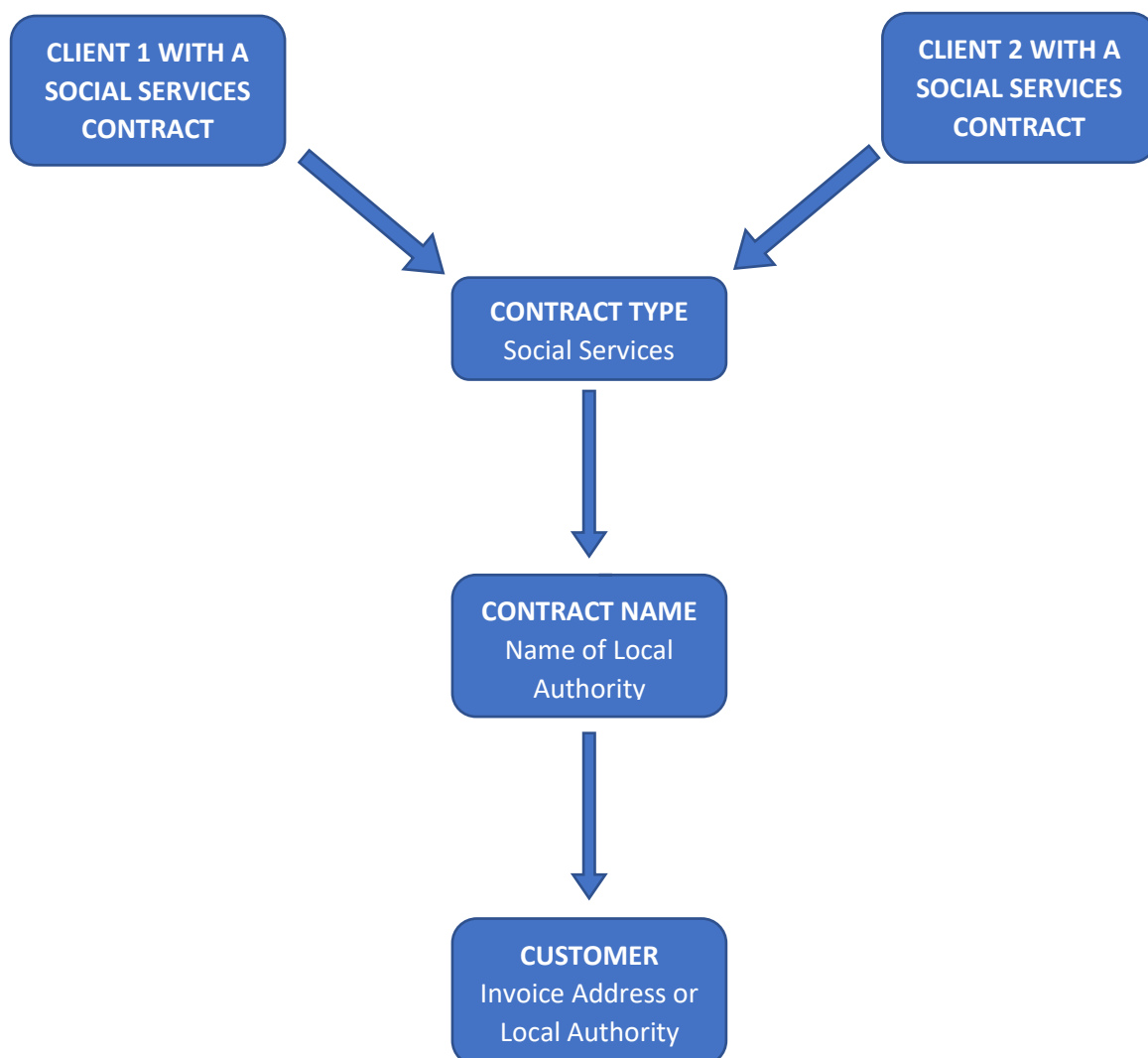
Things become slightly more complex when we need to create contracts and apply charge rates for Clients who share blanket contracts.



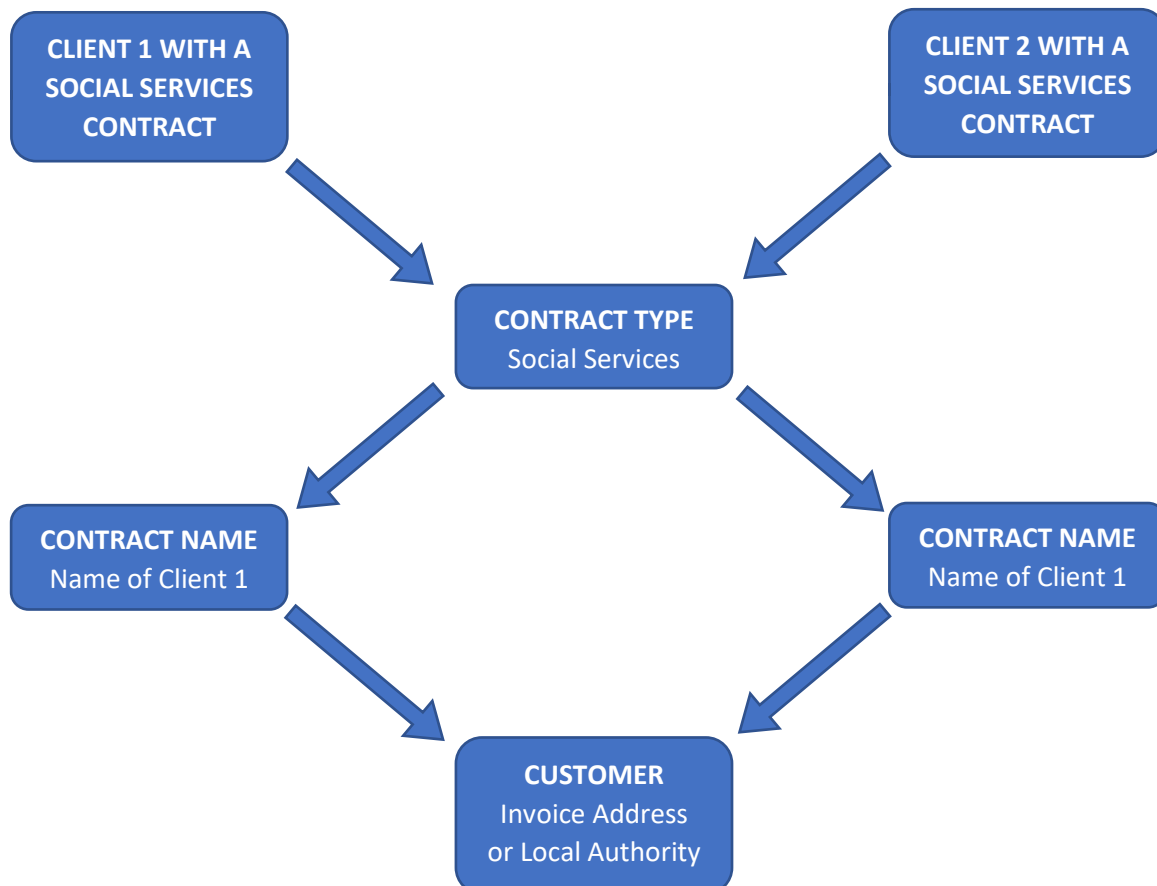
## Blanket Contracts – Social Services / NHS

A social services or NHS contract type is likely to have more elements which are shared by multiple Clients. There are a number of different ways they can be structured, in order to provide sufficient flexibility when setting charge rates for your Clients.

If all your Clients under a specific social services contract are charged the same rates, a contract can be created and structured as follows:

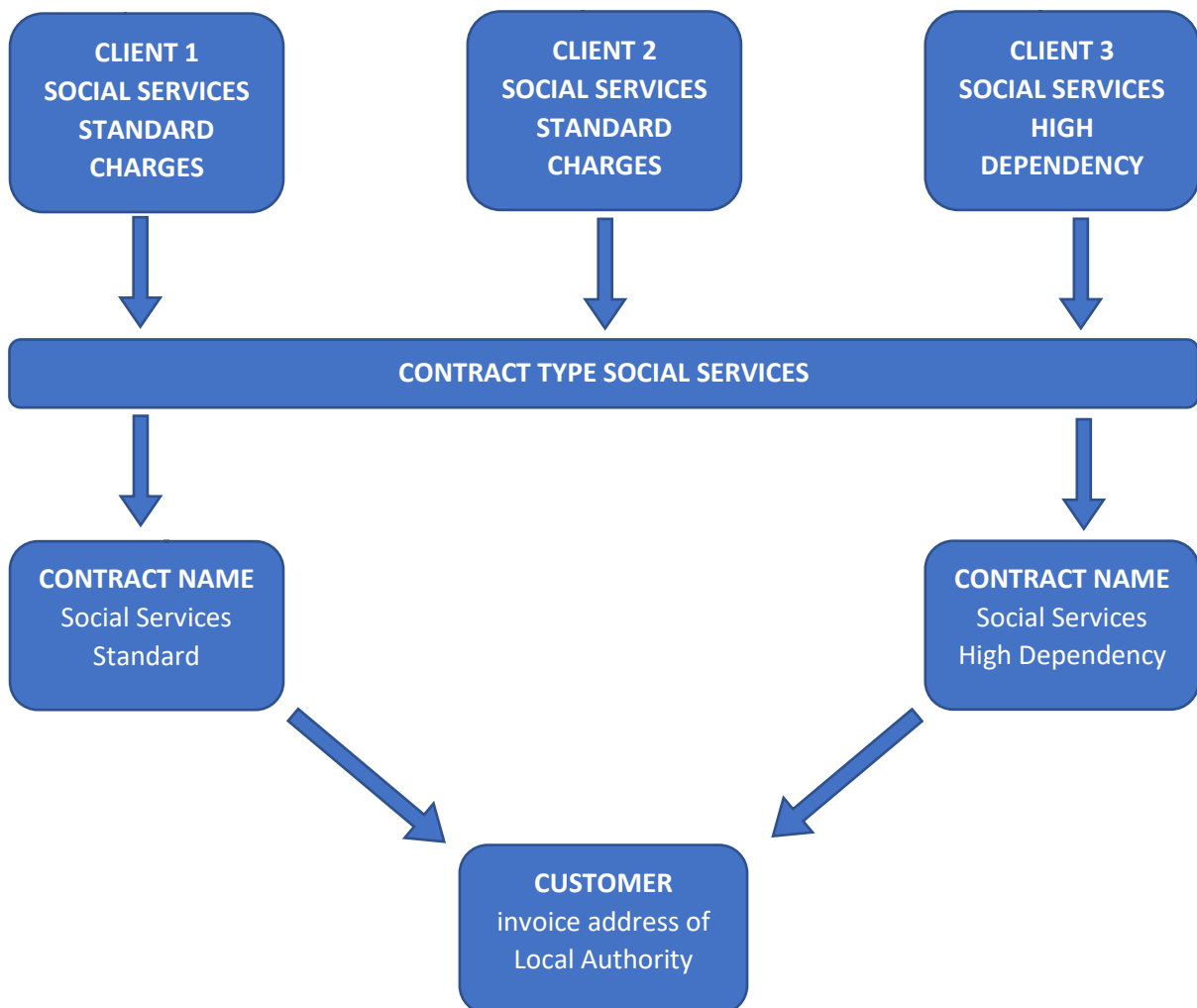


If, however you have multiple Clients whose care is paid for by the same local authority, but all are charged different rates. It will be preferable to structure their contracts as follows, creating unique contracts for them in the **Contract Maintenance** screen, but linking them all to the same Customer:



Finally, you might have agreed a number of different bandings for charge rates within your agreement with the local authority. If this is the case, you can create a contract for each banding, attach all the contracts to the same customer and then link the Clients to the appropriate contract according to which banding they fall into.

This agreement will be structured in CareFree as follows:



## Specifying Charge Rates for Client Invoicing using Rules

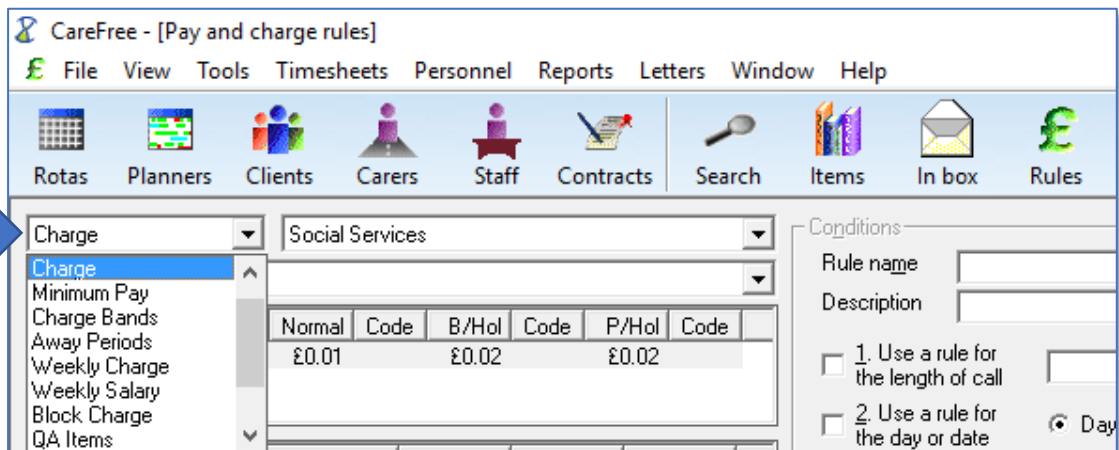
To begin specifying rates for invoicing, you must first decide if you can apply blanket charge rates for all Clients who have a particular contract type (e.g. all private Clients, or if the rates will vary for each individual Client and Contract).

To begin entering the charge rates enter the Rules screen:

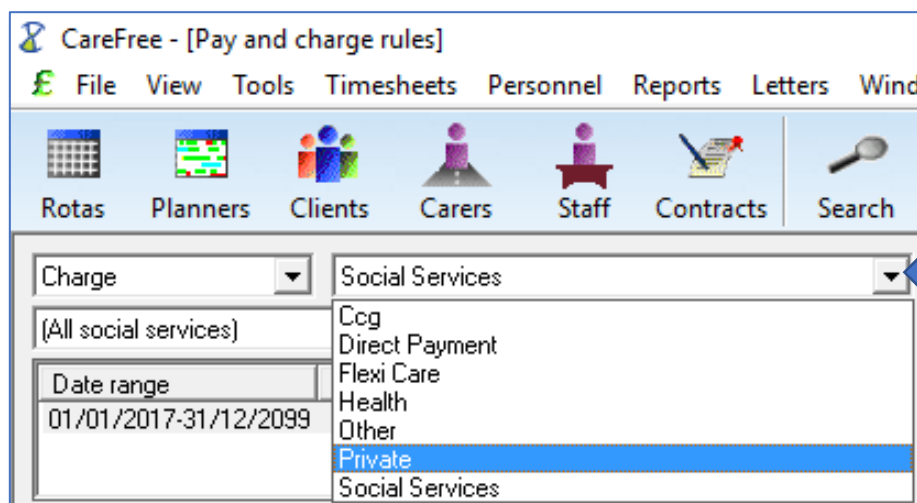
1. Click on **Rules**



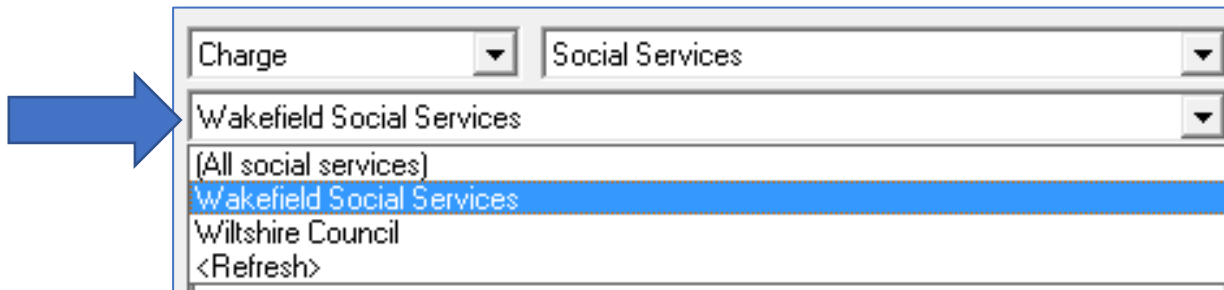
2. Press the drop-down menu at the top of the screen and select **Charge**



3. Select the **Contract Type** you wish to specify rates for in the second drop down box



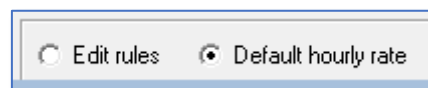
- If you wish to set blanket rates for all Clients with the selected **Contract Type**, leave (**All Contract Type**) selected in the third drop down box
- Alternatively, pick an individual contract to specify rates for just that person (or group of people who are included under the contract)



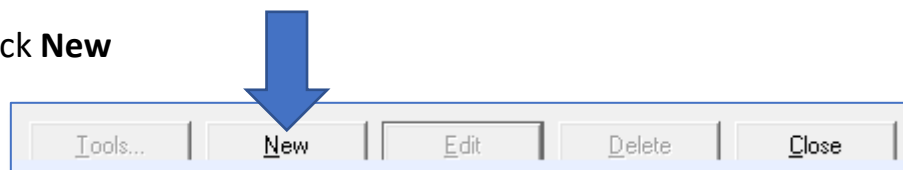
Once the relevant contract type and/or individual contract has been selected, it is possible to begin specifying the appropriate charge rates.

## Default Hourly Rate

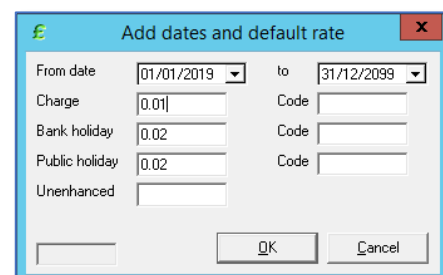
Before creating the rules governing the charges you will be asked to specify a **Default Hourly Rate**. You will see that the radio button at the bottom left of the screen will be set to Default Hourly Rate.



- Click **New**



- Enter the relevant date range for the rate using the **From Date** and **To** drop-down boxes
- Enter 0.01p in the **Charge** field



It would seem logical to enter whatever your standard or base charge rate for providing care under this contract is here. We only recommend doing this if your rate structure is incredibly simple. Usually we suggest entering a Default Hourly Rate of one penny (0.01p) as it will help to highlight any problems or errors in your rules when you generate invoices. Any calls which feed through to invoicing that are charged at £0.01 will help you to quickly identify errors made.

When you enter £0.01 in the Charge box, the Bank Holiday and Public Holiday rate boxes will automatically be populated at £0.02. These would be the default hourly rates for Bank Holidays and Public Holidays. The way CareFree identifies such holidays is explained on [page 90](#) of this guide. It isn't necessary to change these rates back to 0.01. It will be just as easy to identify calls which feed through to invoices at £0.02. The unenhanced rate can be left blank.

#### 4. Click **OK** to save the Default Hourly Rate

Once saved, the Default Hourly Rate will be displayed in the box towards the top left of the screen just below the drop-down boxes you used to select the Contract etc.

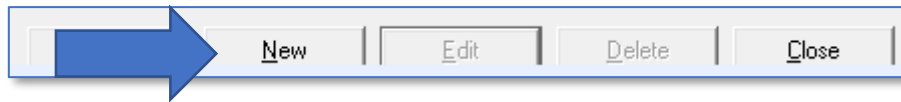
Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	

The radio button will automatically move over to select **Edit Rules** once a Default Hourly Rate is entered.

**If you make an error when entering the default hourly rate, simply select the Default Hourly Rate radio button and click Edit to change**

## Creating and Editing Rules

1. Click **New** to begin entering the rules governing charges under the selected contract type/contract



2. Give the rule an appropriate name in the **Rule Name** box
3. Further description can be added in the **Description** box (optional)

Begin creating the individual rules which will build the overall charging structure for this contract type/contract using the 7 rules available in CareFree.

The next few sections of this guide will cover each rule.

Once the appropriate rules are selected enter the rate in the first **Normal Rate** field. The bank holiday and public holiday figures will multiply by the figure entered in the shared options ([page 91](#)).

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60
Driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60

## Rule #1 – Use a Rule for the Length of the Call

Rule 1 is used where organisations wish to band their calls because charges are not calculated as straight hourly pro-rata rates. For example:

- 15-minute calls are charged at a fixed rate of £5.00
- 30-minute calls are charged at a fixed rate of £7.70
- 45-minute calls are charged at a fixed rate of £10.90
- 60-minute calls are charged at a fixed rate of £12.50
- Calls over 60 minutes are charged at a pro rata rate of £12.50
- Calls on bank holidays are to be charged at 1.5 x the standard rates
- Calls on public holidays are to be charged at 2 x the standard rates

To create the structure above, 5 separate rules would need to be input. The following screenshots show how the rules would be entered into the system:

### 15-Minute Calls

Conditions

Rule name: 15 Minute Calls

Description:

1. Use a rule for the length of call: 0 to 15 Approved 15 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	60
▶ Driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
▶ Driver			

Export as: Hours



## 30-Minute Calls

Conditions

Rule name: 30 Minute Calls

Description:

1. Use a rule for the length of call: 16 to 30 Approved 30 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£7.70	£11.55	£15.40	<input type="checkbox"/>	60
Driver	£7.70	£11.55	£15.40	<input type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## 45-Minute Calls

Conditions

Rule name: 45 Minute Calls

Description:

1. Use a rule for the length of call: 31 to 45 Approved 45 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£10.90	£16.35	£21.80	<input type="checkbox"/>	60
Driver	£10.90	£16.35	£21.80	<input type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## 60-Minute Calls

Conditions

Rule name: 60 Minute Calls

Description:

1. Use a rule for the length of call: 46 to 60 Approved 60 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£12.50	£18.75	£25.00	<input type="checkbox"/>	60
▶ Driver	£12.50	£18.75	£25.00	<input type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## Calls Over 60 Minutes

Conditions

Rule name: 60 Minute+ Calls

Description:

1. Use a rule for the length of call:

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60
Driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

None of the options are used to create this rule as we want it to catch any calls which aren't covered by the exception rules we have already created.

## Pro-Rata or Fixed Charge Rates

It is important to note that in the rules used to create the charge rates for the time banded calls (15 minutes, 30 minutes etc.) the option to create pro-rata charge rates were unticked.



Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.50	£18.75	£25.00	<input type="checkbox"/>	0
Driver	£12.50	£18.75	£25.00	<input type="checkbox"/>	0

This is because the charges are fixed and it isn't necessary for CareFree to perform calculations based on the length of the call.

However, when creating the rule for the 60-minute plus calls it is essential to leave the option to create pro-rata charge rates ticked. This is because CareFree will need to calculate the cost of the call based on its duration. So, for a 90-minute call, CareFree will multiply the rates by 1.5 and for a 2 hour call it will multiply the rates by 2.

## Exception Rule List Order

If the rules above were entered in the order in which they appear in this guide, the list of rules would look like this:

Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	

Exception Rule	Normal	B/Hol	P/Hol
15 Minute Calls	5.00	7.50	10.00
30 Minute Calls	7.70	11.55	15.40
45 Minute Calls	10.90	16.35	21.80
60 Minute Calls	12.50	18.75	25.00
60 Minute+ Calls	12.50	18.75	25.00

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	0
Driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

The order in which the rules appear is significant and it is important to consider how the order might affect the way in which the rules are applied.

When generating invoices or wages, CareFree gathers data from the rota. It runs the data through the Verify screen to ensure that what was planned by the co-ordinators is what has actually happened in reality. It then looks at the rules screen and applies the rates which have been created for pay and charge.

**It is important to realise that when CareFree looks at these rules, it looks at the list from the top down to the bottom.**

This means that the more specific/unique rules need to be positioned higher up the list than the more general “catch all” rules which can be added towards the bottom. The order of rules lists will be examined in more detail throughout this learning guide.

Go to [page 35](#) for more information on the rules list order.

## Rule #2 – Use a Rule for the Day or Date

As the name suggests it is possible to use option rule 2 to create rules which relate to specific days or dates. The options available are listed under the drop-down menu.

The screenshot shows a 'Conditions' dialog box with the following elements:

- Rule name: [Text Field]
- Description: [Text Field]
- 1. Use a rule for the length of call: [ ] to [ ] Approved [ ] Minutes [v]
- 2. Use a rule for the day or date:  Day [Monday] or  Date [ / / ]
- 3. Use a rule for the role: [ ] (None) [v]
- 4. Use a rule for the client: [ ] (None) [v]
- 5. Use a rule for the need: [ ] Need [v]
- 6. Use a rule for the time range: [ ] to [ ]
- 7. Use a rule for the planned duration: [ ] to [ ] [ ]

The 'Day' dropdown menu is open, showing the following options: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday, Weekday.

Any of the options can be used in conjunction with each other to create complex charge structures. Rule 2 is most commonly used to specify different rates for weekdays and weekends.

Other significant dates can be specified using this rule also. A specific date can be specified by using the **Date** radio button on this rule.

This screenshot shows the 'Day' dropdown menu expanded to show holiday and special date options. Two blue arrows point to the 'Day' and 'Date' radio buttons. The 'Day' dropdown menu includes the following options: Monday, Fri-Sun, Christmas eve, Christmas day, Boxing day, New Years ev, New Years da, Bank Holidays, and Public Holiday.

## Rule #3 – Use a Rule for a Role

Option 3 can be used to charge different rates for care which is being provided by a specific type of Carer. **Roles** are assigned to Carers in the Payroll tab on the Carers screen and govern how much a Carer is paid. Rule 3 allows users to specify different charge rates to Clients based on the type of Carer completing a call.

For example, if standard domiciliary care is charged at a rate of £12 per hour pro-rata, but care provided by Registered Nurses is charged at £15 per hour, using rule 3 would allow this uplifted rate to be specified. Any calls which are allocated to a Carer with the payroll role as Registered Nurse would be charged to the Client at the higher rate.

Conditions

Rule name

Description

1. Use a rule for the length of call  to  Approved  Minutes

2. Use a rule for the day or date  Day  or  Date

3. Use a rule for the role

4. Use a rule for the client

5. Use a rule for the need

6. Use a rule for the time range

7. Use a rule for the planned duration  to

Registered Nurse

Registered Nurse

Senior Care Worker

Senior Management

Social Worker

Supervisor

Support Worker #1

Support Worker #2

Support Worker #3

## Rule #4 – Use a Rule for the Client

Rule 4 can be used to create exception rules for specific charges which must be applied to a particular Client. It is often used when just one or two Clients must be charged differently to the majority of Clients who are included under a particular contract.

An example of this may be where you have a contract to deliver care to many Clients with your local authority at a standard rate of £12 per hour, but there are two Clients with more intensive care needs. You have agreed to provide care to these two Clients at £13 per hour. To specify this, you would create two rules using rule 4, naming selecting the Clients in turn and entering a rate of £13.

Conditions

Rule name: Sue Barker Rate

Description:

1. Use a rule for the length of call: [ ] to [ ] Approved [ ] Minutes

2. Use a rule for the day or date:  Day [ ] or  Date [ ]/[ ]/[ ]

3. Use a rule for the role: [ (None) ]

4. Use a rule for the client: [ Barker, Sue ]

5. Use a rule for the need: [ Need ] [ (None) ]

6. Use a rule for the time range: [ ] to [ ]

7. Use a rule for the planned duration: [ ] to [ ] 28-6

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60
Driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## Rule #5 – Use a Rule for the Need

Rule 5 is an incredibly useful way of specifying charges for specific types of care calls or services. It is most commonly used to apply fixed charges for services such as live-in care or waking/sleeping nights.

**You must ensure that your co-ordinators understand the importance of adding the appropriate needs to calls on Client rotas, as omitting or incorrectly entering needs will have implications for Client charges.**

If we wanted to apply a fixed charge of £80 for a sleeping night:

- **Sleeping Night** must be added to the Needs list in the Items screen
- The need **Sleeping Night** is added to overnight shifts on Client rotas
- Rule 5 can then be used to specify fixed charge of £80
- To ensure the charge is fixed at £80, regardless of the length of the call on the rota, the pro-rata option must be un-ticked

Conditions

Rule name: Sleeping Night

Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes [v]

2. Use a rule for the day or date  Day [ ] or  Date [ ]

3. Use a rule for the role [None] [v]

4. Use a rule for the client [None] [v]

5. Use a rule for the need Need [v] Sleeping Night [v]

6. Use a rule for the time range [ ] to [ ]

7. Use a rule for the planned duration [ ] to [ ] [ ]

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£80.00	£120.00	£160.00	<input type="checkbox"/>	0
▶ Driver	£80.00	£120.00	£160.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
▶ Driver			

Export as: Hours [v]



## Rule #6 – Use a Rule for a Time Range

Rule 6 makes it possible to set different rates of charge at different times of the day/night. This option is frequently used by organisations who charge a premium rate for calls at unsocial times of the day.

For example, if your organisation’s standard daytime rate is £12 per hour between the hours of 8am and 6pm (daytime standard rate) then outside of those times you charged £13.50 (evening & night rate) you would create two rules using rule 6 as follows:

### Social Hours Rule

Conditions

Rule name: Social Hours  
Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes [v]  
 2. Use a rule for the day or date  Day [ ] or  Date [ ]/[ ]/[ ] [v]  
 3. Use a rule for the role (None) [v]  
 4. Use a rule for the client (None) [v]  
 5. Use a rule for the need Need [v] (None) [v]  
 6. Use a rule for the time range 08:00 to 18:00 [v]  
 7. Use a rule for the planned duration [ ] to [ ] 28-8 [v]

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.00	£18.00	£24.00	<input checked="" type="checkbox"/>	60
▶ Driver	£12.00	£18.00	£24.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday	Export as
▶ Non-driver				Hours [v]
▶ Driver				

### Un-Social Hours Rule

Conditions

Rule name: Un-Social Hours  
Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes [v]  
 2. Use a rule for the day or date  Day [ ] or  Date [ ]/[ ]/[ ] [v]  
 3. Use a rule for the role (None) [v]  
 4. Use a rule for the client (None) [v]  
 5. Use a rule for the need Need [v] (None) [v]  
 6. Use a rule for the time range 18:00 to 08:00 [v]  
 7. Use a rule for the planned duration [ ] to [ ] 28-9 [v]

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£13.50	£20.25	£27.00	<input checked="" type="checkbox"/>	60
▶ Driver	£13.50	£20.25	£27.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday	Export as
▶ Non-driver				Hours [v]
▶ Driver				

## Rule #7 – Use a Rule for the Planned Duration

Rule 7 is used in quite specific circumstances by organisations who have implemented Electronic Call Monitoring (ECM). It can be used to create a set of financial rules where the following criteria apply:

- Calls are banded because charges are not calculated as straight hourly pro-rata rates
- If the actual duration of the call falls below the planned duration (i.e. call monitoring data shows that the Carer did not stay for the full duration of the call) the call is still charged at the full planned duration rate
- Where the actual duration of the call is greater than the planned duration (i.e. call monitoring data shows that the Carer overstayed on the call) the call is charged at the actual duration rate

For example:

- An organisation bands the charges for calls as follows:
  - *15-minute calls – £8.50 per call*
  - *30-minute calls – £10.00 per call*
  - *60-minute calls – £13.00 per call*
  - *Calls over 60 minutes – £13 per hour pro-rata*
- A 30-minute call is added to a Client rota
  - If the Carer logs in and out and stays for only 25 minutes, the call will be charged at the full £10 rate
  - However, if the Carer logs in and out but stays for 40 minutes, the call will be charged at £10 pro rata of 30 minutes for the full 40 minutes, meaning the charge will be £13.33

To set up the charge structure described above, rule 7 must be used in conjunction with rule 1 and two rules must be created for each time banding.

## 15-Minute Calls

Firstly, a rule must be created which will be applied when the actual duration of the call is less than the planned duration of 15 minutes.

1. Rule name: 15 Minute Planned

2.  1. Use a rule for the length of call: 0 to 15 Approved 15 Minutes

3.  7. Use a rule for the planned duration: 0 to 15 28-3

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.50	£12.75	£17.00	<input type="checkbox"/>	0
Driver	£8.50	£12.75	£17.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

1	Give the rule an appropriate <b>Name</b>
2	The time period specified in rule 1 will be the <b>Actual</b> duration of the call. So, for calls which last for 15 minutes or less the duration here will be 0 to 15 minutes
3	The time period specified in rule 7 will be the <b>Planned</b> duration of the call. So again, in the this rule the duration will be 0 to 15 minutes
4	The charge for any call of 15 minutes or less (actual duration) will be £8.50. This charge is fixed, so pro-rata must not be ticked

Once the first rule has been saved, a second rule must be created to cover the situations where a 15-minute call is planned, but the Carer stays for longer than 15 minutes.

1 → Rule name: 15 Minute Actual

2 →  1. Use a rule for the length of call: 16 to 999, Approved 0, Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need, (None)

6. Use a rule for the time range: : to :

3 →  7. Use a rule for the planned duration: 0 to 15, 28-4

4 →

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.50	£12.75	£17.00	<input checked="" type="checkbox"/>	15
Driver	£8.50	£12.75	£17.00	<input checked="" type="checkbox"/>	15

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

1	Give the rule an appropriate <b>Name</b>
2	The time period specified in rule 1 will be the <b>Actual</b> duration of the call. So, to cover calls which last for more than 15 minutes a duration of 16 to 999 minutes is specified
3	The time period specified in rule 7 will be the <b>Planned</b> duration of the call so the duration is specified as 0 to 15 minutes
4	The charge for any call planned for 15 minutes where the Carer overstays is £8.50 pro-rata of 15 minutes. Pro-rata must be ticked and 15 is entered in the <b>By</b> field

## 30-Minute Calls

To set up the same type of structure for 30-minute calls we must again first specify a rule which will be applied when the actual duration of the call is less than the planned duration of 30 minutes.

Conditions

Rule name: 30 Minute Planned

Description:

1.  Use a rule for the length of call: 0 to 30 Approved 30 Minutes

2.  Use a rule for the day or date: Day or Date

3.  Use a rule for the role: (None)

4.  Use a rule for the client: (None)

5.  Use a rule for the need: Need (None)

6.  Use a rule for the time range:

7.  Use a rule for the planned duration: 16 to 30 28-11

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£10.00	£15.00	£20.00	<input type="checkbox"/>	0
Driver	£10.00	£15.00	£20.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

1	Give the rule an appropriate <b>Name</b>
2	The time period specified in rule 1 will be the <b>Actual</b> duration of the call. So, for calls which last for 30 minutes or less the duration here will be 0 to 30 minutes
3	The time period specified in rule 7 will be the <b>Planned</b> duration of the call. This time the duration will be 16 to 30 minutes to ensure that calls planned for 15 minutes are excluded from the rule
4	The charge for any call of 30 minutes or less (actual duration) will be £10. This charge is fixed, so pro-rata must not be ticked

Once the first rule has been saved, a second rule must be created to cover the situations where a 15-minute call is planned, but the Carer stays for longer than 15 minutes.

1 → Rule name: 30 Minute Actual

2 →  1. Use a rule for the length of call: 31 to 999 Approved 0 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the role: (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range: : to :

3 →  7. Use a rule for the planned duration: 16 to 30 28-12

4 →

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£10.00	£15.00	£20.00	<input checked="" type="checkbox"/>	30
Driver	£10.00	£15.00	£20.00	<input checked="" type="checkbox"/>	30

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

1	Give the rule an appropriate <b>Name</b>
2	The time period specified in rule 1 will be the <b>Actual</b> duration of the call. So, to cover calls which last for more than 30 minutes a duration of 31 to 999 minutes is specified
3	The time period specified in rule 7 will be the <b>Planned</b> duration of the call so the duration is specified as 16 to 30 minutes to ensure that calls planned for 15 minutes are excluded from the rule
4	The charge for any call planned for 30 minutes where the Carer overstays is £10 pro-rata of 30 minutes. Pro-rata must be ticked and 30 is entered in the <b>By</b> field

## 60-Minute Calls

The exact same process is followed when creating the two rules required for 60-minute calls. Once the data is entered, the rules will look like this:

Conditions

Rule name: 60 Minute Planned

Description:

1. Use a rule for the length of call: 0 to 60 Approved 60 Minutes  
 2. Use a rule for the day or date: Day or Date  
 3. Use a rule for the role: (None)  
 4. Use a rule for the client: (None)  
 5. Use a rule for the need: Need (None)  
 6. Use a rule for the time range:  
 7. Use a rule for the planned duration: 31 to 60 28-5

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£13.00	£19.50	£26.00	<input type="checkbox"/>	0
Driver	£13.00	£19.50	£26.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

Conditions

Rule name: 60 Minute Actual

Description:

1. Use a rule for the length of call: 61 to 999 Approved 61 Minutes  
 2. Use a rule for the day or date: Day or Date  
 3. Use a rule for the role: (None)  
 4. Use a rule for the client: (None)  
 5. Use a rule for the need: Need (None)  
 6. Use a rule for the time range:  
 7. Use a rule for the planned duration: 31 to 60 28-6

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60
Driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## Call Over 60 Minutes

To complete the charge structure, a final rule must be created which covers any call which is planned for a duration greater than 60 minutes.

The 'Conditions' dialog box shows the configuration for the '60 Minute+ Pro Rata' rule. The 'Rule name' is '60 Minute+ Pro Rata' and the 'Description' is empty. The conditions are as follows:

- 1. Use a rule for the length of call:  to  Approved  Minutes
- 2. Use a rule for the day or date:  Day  or  Date
- 3. Use a rule for the role:  (None)
- 4. Use a rule for the client:  (None)
- 5. Use a rule for the need:  Need  (None)
- 6. Use a rule for the time range:  to
- 7. Use a rule for the planned duration:  to  28-7

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60
Driver	£13.00	£19.50	£26.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday	Export as
▶ Non-driver				Hours
Driver				

None of the rules need to be used. £13 is added to the charge rate boxes and pro-rata is left ticked. This rule is then added to the bottom of the list, so will only ever be applied to calls which have a planned duration which is greater than 60 minutes.

Calls with planned durations of less than 60 minutes will be picked up by the other rules which have been added before they reach this rule at the foot of the list. The rules list will look like the example below, which also includes two rules at the top of the list to cover fixed charges for sleeping nights:

The 'Conditions' dialog box is shown on the right, identical to the previous one. On the left, a table shows the 'Exception Rule' list:

Exception Rule	Normal	B/Hol	P/Hol
Weekday Sleeping Night	80.00	120.00	160.00
Weekend Sleeping Night	90.00	135.00	180.00
15 Minute Planned	8.50	12.75	17.00
15 Minute Actual	8.50	12.75	17.00
30 Minute Planned	10.00	15.00	20.00
30 Minute Actual	10.00	15.00	20.00
60 Minute Planned	13.00	19.50	26.00
60 Minute Actual	13.00	19.50	26.00
60 Minute+ Pro Rata	13.00	19.50	26.00

The 'Conditions' dialog box on the right shows the '60 Minute+ Pro Rata' rule configuration, with the 'Pro-rata' checkbox checked and the 'By' field set to '60'.



## Using Multiple Rules to Create Complex Rate Structures

It is possible to accommodate complex invoicing rate structures by specifying rules which use multiple options together.

In the example below, a combination of rules has been used to specify rules for the following charging structure:

### Monday to Saturday Social Rates (7am – 7pm)

- 30-minute calls – £12.00
- 60-minute calls – £15.75
- 60-minute+ calls – £15.75 (pro-rata)
- All rates above charged time and a half of bank holidays/public holidays

The screenshot shows a software interface for creating a charging rule. The 'Conditions' panel on the right has the following settings:

- Rule name:** 30 Minute - Mon to Sat - Social Hours
- Description:** 30 Minute - Mon to Sat - Social Hours
- 1:**  Use a rule for the length of call: 0 to 30 Approved 0 Minutes
- 2:**  Use a rule for the day or date: Day Mon-Sat or Date
- 3:**  Use a rule for the time range: 07:00 to 19:00
- 4:** Normal Rate: £12.00, Bank Holiday: £18.00, Public Holiday: £18.00, Pro-rata:
- 5:** Pro-rata:

The table below the conditions panel shows the following data:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.00	£18.00	£18.00	<input type="checkbox"/>	0
Driver	£12.00	£18.00	£18.00	<input type="checkbox"/>	0

1	<b>Rule 1</b> is used to specify the length of the calls. In this example the rule is for 30-minute calls
2	<b>Rule 2</b> is used to specify the day or date of the calls. In this example the rule is set for Monday to Saturday
3	<b>Rule 6</b> is used to specify the time of the calls. In this example the rule is set for 7am to 7pm
4	<b>Rates</b> are entered in the boxes here. Bank holidays and public holidays are specified at time and a half
5	The <b>Pro-rata</b> box is left unticked as these 30-minute calls are charged at a fixed rate. We do not want CareFree to do any pro-rata calculations

## 60-Minute Calls

Charge: North Social Services  
Hertfordshire County Council

Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	

Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62

Conditions:

Rule name: 60 Minute - Mon to Sat - Social Hours  
Description:

- 1. Use a rule for the length of call: 31 to 60 Approved 31 Minutes
- 2. Use a rule for the day or date: Day Mon-Sat or Date
- 3. Use a rule for the role: (None)
- 4. Use a rule for the client: (None)
- 5. Use a rule for the need: Need (None)
- 6. Use a rule for the time range: 07:00 to 19:00
- 7. Use a rule for the planned duration: 29-2

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£15.75	£23.62	£23.62	<input type="checkbox"/>	0
Driver	£15.75	£23.62	£23.62	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

Export as: Hours

Tools... New Edit Delete Close

## 60-Minute+ Calls

Charge: North Social Services  
Hertfordshire County Council

Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	

Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62

Conditions:

Rule name: 60 Minute+ - Mon to Sat - Social Hours  
Description:

- 1. Use a rule for the length of call: to Approved Minutes
- 2. Use a rule for the day or date: Day Mon-Sat or Date
- 3. Use a rule for the role: (None)
- 4. Use a rule for the client: (None)
- 5. Use a rule for the need: Need (None)
- 6. Use a rule for the time range: 07:00 to 19:00
- 7. Use a rule for the planned duration: 29-3

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£15.75	£23.62	£23.62	<input checked="" type="checkbox"/>	60
Driver	£15.75	£23.62	£23.62	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

Export as: Hours

Tools... New Edit Delete Close

Rule 1 is not used to create the pro-rata 60-minute+ rate

The pro-rata box is ticked to create this rate as we want CareFree to calculate the charges based on the length of the call pro-rata of the £15.75 rate

# The Importance of the Order of the Exception Rule List

In the example above, we end up with a list of 3 rules which looks like this:

Charge						
North Social Services						
Hertfordshire County Council						
Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	
Exception Rule			Normal	B/Hol	P/Hol	
30 Minute - Mon to Sat - Social Ho...			12.00	18.00	18.00	
60 Minute - Mon to Sat - Social Ho...			15.75	23.62	23.62	
60 Minute+ - Mon to Sat - Social H...			15.75	23.62	23.62	

It is essential to understand how the order of the list of rules can have an impact upon how they will be applied when you generate your invoices. The most important things to remember when looking at your exception rule lists are:

- CareFree always looks at the list of rules starting at the top and moving down
- Exception rules designed to isolate specific circumstances should be placed higher in the list than more general ‘catch all’ rules

If we look at the example created above, the order of the list is correct. The more specific rules (where we isolate calls of 30 minutes and 60 minutes in duration) are placed higher in the list than the general pro-rata rate for any calls above 60 minutes.

If we had placed the 60 min+ rule at the top of the list, this rate would have been applied to any call which happened between the hours of 7am and 7pm on Monday – Saturday as we specified no particular call duration when creating the rule.



Conditions

Rule name: 60 Minute+ - Mon to Sat - Social Hours

Description:

1. Use a rule for the length of call  to  Approved  Minutes

2. Use a rule for the day or date  Day Mon-Sat or  Date / /

3. Use a rule for the role  (None)

4. Use a rule for the client  (None)

5. Use a rule for the need  Need  (None)

6. Use a rule for the time range  07:00 to  19:00

7. Use a rule for the planned duration  to  29-3

What we want to do with the 3 rules above is ensure that the calls lasting 30 and 60 minutes are filtered out first and then apply the pro-rata 60 min+ rate to all other calls between 7am – 7pm on Monday – Saturday.

## Building the Complexity and Ordering the List Appropriately

We may want to specify two distinct rate structures for one contract based on the type of care we are providing to the Clients who are linked to it.

For example, we may say that our rates for cleaning and social calls are as described in the previous example, but our rates for providing personal care carry a slight premium such as:

- *30-minute calls – £13.00*
- *60-minute calls – £16.75*
- *60-minute+ calls – £16.75 (pro-rata)*
- *All rates above charged time and a half of bank holidays/public holidays*

To specify these premium rates, we would need to create a need called **Personal Care** which could be added to calls on the rota to indicate that they carry the premium rate.

For instructions on how to create Needs and add them to calls on the Rota, please see our Day 1 training booklet

When the need is created, we can begin to specify premium rates.

## 30-Minute Calls

The new rule is created in exactly the same way as the previous rule for 30 minute calls except this time we also use rule 5 and specify the need as Personal Care

Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50

Conditions:

Rule name: 30 Minute - Mon to Sat - Social - Personal

Description:

- 1. Use a rule for the length of call: 0 to 30 Approved 0 Minutes
- 2. Use a rule for the day or date: Day Mon-Sat or Date
- 3. Use a rule for the role: (None)
- 4. Use a rule for the client: (None)
- 5. Use a rule for the need: Need Personal Care
- 6. Use a rule for the time range: 07:00 to 19:00
- 7. Use a rule for the planned duration: 29.4

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£13.00	£19.50	£19.50	<input type="checkbox"/>	0
Driver	£13.00	£19.50	£19.50	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

Export as: Hours

Buttons: Tools... New Edit Delete Close

## 60-Minute Calls

Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12

Conditions:

Rule name: 60 Minute - Mon to Sat - Social - Personal

Description:

- 1. Use a rule for the length of call: 31 to 60 Approved 31 Minutes
- 2. Use a rule for the day or date: Day Mon-Sat or Date
- 3. Use a rule for the role: (None)
- 4. Use a rule for the client: (None)
- 5. Use a rule for the need: Need Personal Care
- 6. Use a rule for the time range: 07:00 to 19:00
- 7. Use a rule for the planned duration: 29.5

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£16.75	£25.12	£25.12	<input type="checkbox"/>	0
Driver	£16.75	£25.12	£25.12	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

Export as: Hours

Buttons: Tools... New Edit Delete Close

## 60-Minute+ Calls

Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.01		£0.02		£0.02	

Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12
60 Minute+ - Mon to Sat - Social - ...	16.75	25.12	25.12

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
Non-driver	£16.75	£25.12	£25.12	<input checked="" type="checkbox"/>	60
Driver	£16.75	£25.12	£25.12	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
Non-driver			
Driver			

With the new rules created, we must now ensure the exception rule list is ordered correctly. The rules we created most recently are automatically added to the bottom of the rule list, so this is what we will now see:

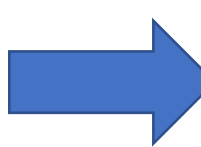
Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12
60 Minute+ - Mon to Sat - Social - ...	16.75	25.12	25.12

As the rules we created for the need Personal Care are more specific than the rules we originally created, they need to be moved higher up the list.

## Changing the Order of the List

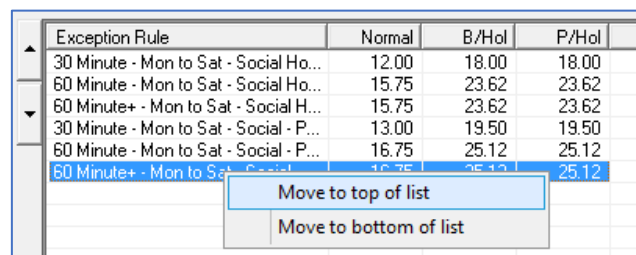
To move a rule up or down in the list:

1. Click on the rule in the list to select it
2. Use the up or down arrows to alter its position



Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12
60 Minute+ - Mon to Sat - Social - ...	16.75	25.12	25.12

1. Alternatively, click on the rule in the list to select it
2. Right-click to see further options



Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12
60 Minute+ - Mon to Sat - Social - ...	16.75	25.12	25.12

Move to top of list

Move to bottom of list

The correct order for the list in the example described above would be as follows:

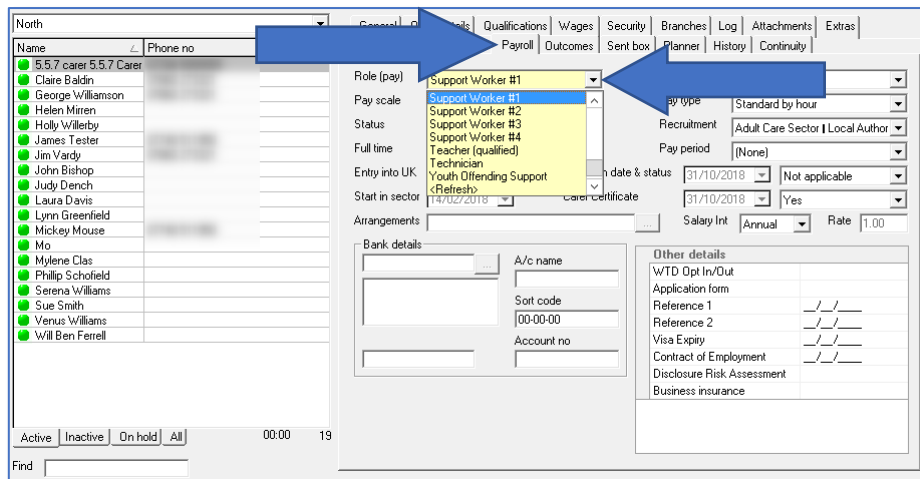
Exception Rule	Normal	B/Hol	P/Hol
30 Minute - Mon to Sat - Social - P...	13.00	19.50	19.50
60 Minute - Mon to Sat - Social - P...	16.75	25.12	25.12
60 Minute+ - Mon to Sat - Social - ...	16.75	25.12	25.12
30 Minute - Mon to Sat - Social Ho...	12.00	18.00	18.00
60 Minute - Mon to Sat - Social Ho...	15.75	23.62	23.62
60 Minute+ - Mon to Sat - Social H...	15.75	23.62	23.62

The more specific rules are added at the top of the list so that Personal Care premium rate calls are filtered out first and charged at the correct rate.

All other calls will be picked up by the less specific rules lower down in the list.

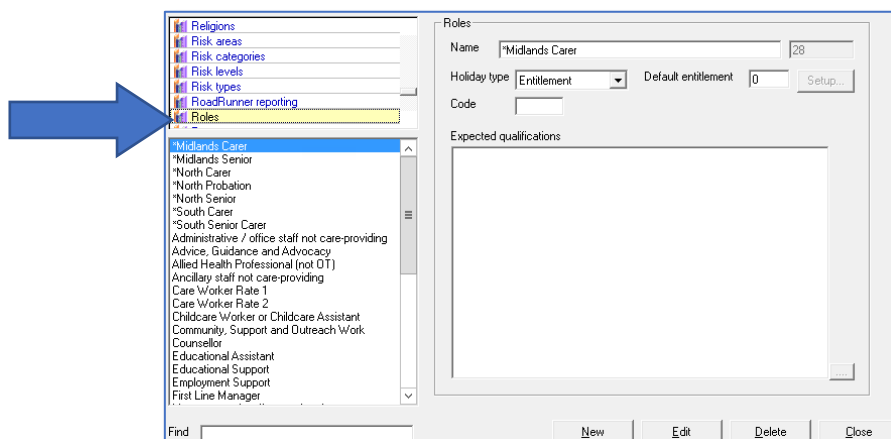
# Preparing to Implement Wages/Payroll in CareFree

CareFree offers the flexibility to create many different wage structures for individuals and groups of employees. Pay rates are always linked to a **Carers Role** which is assigned to them in the Carers screen on their **Payroll** tab.



## Creating and Editing Payroll Roles in Items

For each unique pay banding or group your organisation has, you will need to create a new Role. Roles can be created or edited in the **Items** screen.



It is also possible to include staff who have monthly or weekly fixed salaries. To do this you will need to create a unique Role for each person, so they can be given a unique monthly or weekly salary.



## How Roles Relate to Wages

To illustrate how Roles relate to Wages we will take a look at how a typical care company might set up CareFree.

### Setting up Roles – AA Star Care Example

'AA Star Care' wants to set up wages in CareFree with the following different pay bandings for its employees:

- *New employees in their probationary period (Paid by the hour)*
- *Existing employees who do not have an NVQ (Paid by the hour)*
- *Existing employees with an NVQ qualification (Paid by the hour)*
- *Office based and occasionally deliver care (Paid by the hour)*
- *Office Manager (Sue Smith) (Salaried)*
- *Care Co-ordinator (Claire Brown) (Salaried)*
- *Finance Manager (Julie Thomas) (Salaried)*
- *Owner (Rachel Green)*

Seven different Roles would need setting up in the Items screen:

- *Carer Probation*
- *Carer Unqualified*
- *Carer NVQ*
- *Office with Care*
- *Office Manager*
- *Care Co-ordinator*
- *Julie Thomas*
- *Rachel Green*

## Assigning Roles to Employees

Once the roles are created in the Items screen, you will need to open the Carers screen and work down the list of employees, assigning the correct Role to each person within their Payroll tab.

1. Open the **Carers** screen
2. Open the **Payroll** tab
3. Click **Edit**
4. Use the **Role (pay)** drop-down box to select a role for the Carer

The screenshot shows the 'Carers' screen in a software application. The 'Payroll' tab is selected. On the left, a list of employees is shown, with '5.5.7 carer 5.5.7 Carer' selected. The right-hand side displays the details for this employee. The 'Role (pay)' dropdown menu is open, showing a list of roles: 'Support Worker #1', 'Support Worker #2', 'Support Worker #3', and 'Support Worker #4'. A blue arrow points to 'Support Worker #1'. Other fields include 'Pay scale' (Support Worker #1), 'Status' (Support Worker #3), 'Full time' (Teacher (qualified) Technician), 'Entry into UK' (Youth Offending Support), 'Start in sector' (14702/2018), 'Arrangements', 'Bank details', and 'Other details'.

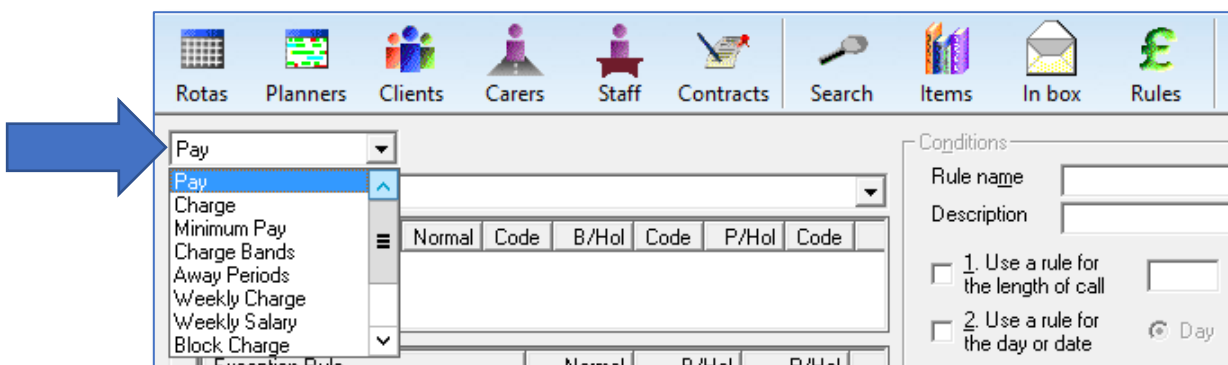
5. Click **OK** to save

# Specifying Pay Rates for Staff Wages using Rules

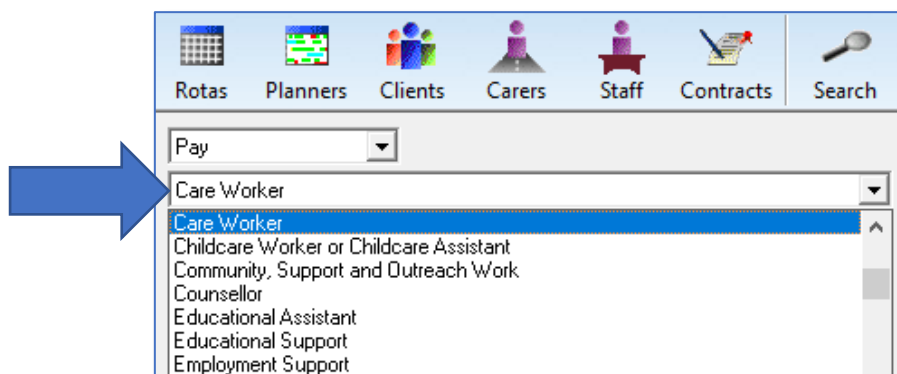
Specifying the rates for staff pay is very similar to creating the rates for Client invoicing. Again, the rates which govern the pay for employees are created using the Rules screen.



1. Click on **Rules**
2. Press the drop-down menu at the top of the screen and select **Pay**

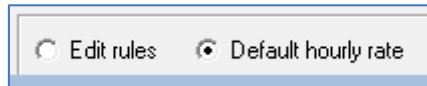


3. Select the role for which you wish to specify rates in the second drop down box



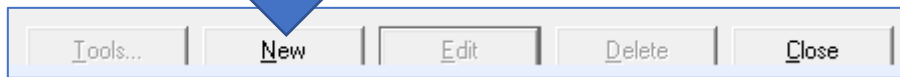
## Default Hourly Rate

Before creating the rules governing the pay you will be asked to specify a Default Hourly Rate. You should be able to see that the radio button at the bottom left of the screen will be set to Default Hourly Rate.



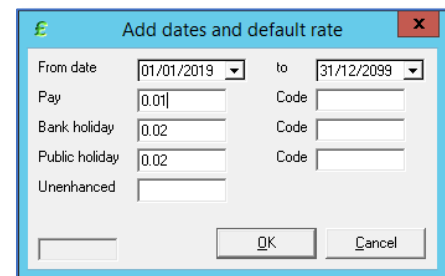
Edit rules    Default hourly rate

1. Click **New**



Tools...   **New**   Edit   Delete   Close

2. Enter the relevant date range for the rate using the **From Date** and **To** drop-down boxes
3. Enter 0.01p in the **Pay** field



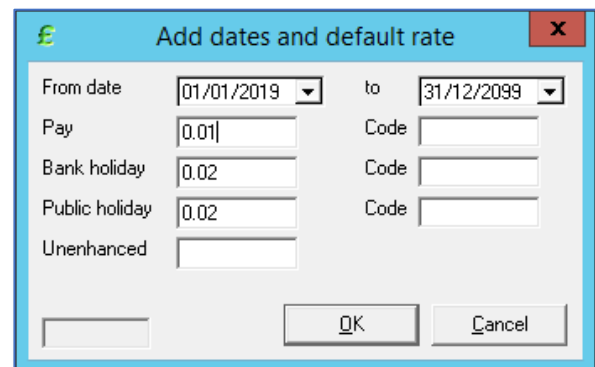
£ Add dates and default rate

From date	[01/01/2019]	to	[31/12/2099]
Pay	[0.01]	Code	
Bank holiday	[0.02]	Code	
Public holiday	[0.02]	Code	
Unenhanced			

OK   Cancel

It would seem logical to enter whatever your standard or base pay rate is for this particular payroll role. We only recommend doing this however, if your pay structure is incredibly simple. Usually we would suggest entering a Default Hourly Rate of one penny (0.01p) as it will help to highlight any problems or errors in your rules when you generate wages. Any calls which feed through to a wage sheet and pay at £0.01 will help you to quickly identify errors made.

When you enter 0.01 in the **Pay** box, the bank holiday and public holiday rate boxes will automatically be populated at 0.02. The way CareFree identifies such holidays will be explained later in this guide. It isn't necessary to change these rates back to 0.01. It will be just as easy to identify calls which feed through to invoices at £0.02. The box for the unenhanced rate can be left blank.



£ Add dates and default rate

From date	[01/01/2019]	to	[31/12/2099]
Pay	[0.01]	Code	
Bank holiday	[0.02]	Code	
Public holiday	[0.02]	Code	
Unenhanced			

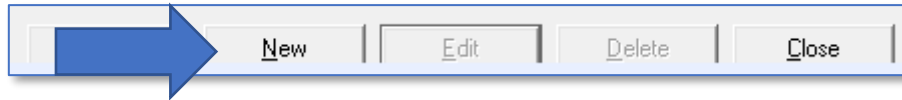
OK   Cancel

4. Click **OK** to save the Default Hourly Rate



## Creating and Editing Rules

1. Click **New** to begin entering the rules governing pay under the selected Role



2. Give the rule an appropriate name in the **Rule Name** box
3. Further description can be added if required in the **Description** box

Begin creating the individual rules which will build the overall pay structure for this Role using the 7 rules available in CareFree.

The next few sections of this guide will cover each rule.

Once the appropriate rules are selected enter the rate in the first **Normal Rate** field. The Bank Holiday and Public Holiday figures will multiply by the figure entered in the shared options (see [page 91](#)).

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60
Driver	£12.50	£18.75	£25.00	<input checked="" type="checkbox"/>	60

## Rule #1 – Use a Rule for the Length of the Call

Rule 1 is used where organisations wish to band their calls because pay is not calculated as straight hourly pro-rata rates. So, for example:

- 15-minute calls are paid at a fixed rate of £4.20
- 30-minute calls are charged at a fixed rate of £5.00
- 45-minute calls are charged at a fixed rate of £7.20
- 60-minute calls are charged at a fixed rate of £8.80
- Calls over 60 minutes are charged at a pro rata rate of £8.80
- Calls on bank holidays are to be charged at 1.5 x the standard rates.
- Calls on public holidays are to be charged at 2 x the standard rates.

To create the structure above, 5 separate rules would need to be input. The following screen shots show how the rules would be entered into the system:

### 15-Minute Calls

Conditions

Rule name: 15 Minute Calls  
Description:

1. Use a rule for the length of call: 0 to 15 Approved 0 Minutes

2. Use a rule for the day or date:  Day or  Date

3. Use a rule for the contract: (None) (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range: to

7. Use a rule for the planned duration: to 31-1

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£4.20	£6.30	£8.40	<input type="checkbox"/>	0
Driver	£4.20	£6.30	£8.40	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## 30-Minute Calls

Conditions

Rule name: 30 Minute Calls  
Description:

1. Use a rule for the length of call: 16 to 30 Approved 16 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the contract: (None) (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration: 31-2

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	0
Driver	£5.00	£7.50	£10.00	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## 45-Minute Calls

Conditions

Rule name: 45 Minute Calls  
Description:

1. Use a rule for the length of call: 31 to 45 Approved 31 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the contract: (None) (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration: 31-3

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£7.20	£10.80	£14.40	<input type="checkbox"/>	0
Driver	£7.20	£10.80	£14.40	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours



## 60-Minute Calls

Conditions

Rule name: 60 Minute Calls

Description:

1. Use a rule for the length of call: 46 to 60 Approved 46 Minutes

2. Use a rule for the day or date: Day or Date

3. Use a rule for the contract: (None) (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration: 31-4

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.80	£13.20	£17.60	<input type="checkbox"/>	0
Driver	£8.80	£13.20	£17.60	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## Calls Over 60 Minutes

Conditions

Rule name: 60 Minute+ Calls

Description:

1. Use a rule for the length of call:

2. Use a rule for the day or date: Day or Date

3. Use a rule for the contract: (None) (None)

4. Use a rule for the client: (None)

5. Use a rule for the need: Need (None)

6. Use a rule for the time range:

7. Use a rule for the planned duration: 31-5

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.80	£13.20	£17.60	<input checked="" type="checkbox"/>	60
Driver	£8.80	£13.20	£17.60	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

None of the options are used to create this rule as we want it to catch any calls which aren't covered by the exception rules we have already created.

## Pro-Rata or Fixed Charge Rates

It is important to note that in the rules used to create the pay rates for the time banded calls (15 minutes, 30 minutes etc.) the option to create pro-rata rates were unticked.



Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.80	£13.20	£17.60	<input type="checkbox"/>	0
Driver	£8.80	£13.20	£17.60	<input type="checkbox"/>	0

This is because the payments are fixed and it isn't necessary for CareFree to perform calculations based on the length of the call.

However, when creating the rule for the 60-minute plus calls it is essential to leave the option to create pro-rata charge rates ticked. This is because CareFree will need to calculate the payment of the call based on its duration. So, for a 90-minute call, CareFree will multiply the rates by 1.5 and for a 2 hour call it will multiply the rates by 2.

## Exception Rule List Order

If the rules above were entered in the order in which they appear in this guide, the list of rules would look like this:

The screenshot shows a software window with a 'Pay' dropdown set to '\*North Carer'. Below this is a table with columns: Date range, Normal, Code, B/Hol, Code, P/Hol, Code. The data row shows: 01/01/2019-31/12/2099, £0.01, £0.02, £0.02.

The main area is an 'Exception Rule' list table:

Exception Rule	Normal	B/Hol	P/Hol
15 Minute Calls	4.20	6.30	8.40
30 Minute Calls	5.00	7.50	10.00
45 Minute Calls	7.20	10.80	14.40
60 Minute Calls	8.80	13.20	17.60
60 Minute+ Calls	8.80	13.20	17.60

To the right is the 'Conditions' panel for the selected rule '15 Minute Calls'. It includes a 'Rule name' field, a 'Description' field, and seven checkboxes for different condition types. The first checkbox is checked, and its configuration is shown: '1. Use a rule for the length of call' with '0' to '15' minutes, 'Approved' status, and 'Minutes' unit.

Below the conditions are two summary tables:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£4.20	£6.30	£8.40	<input type="checkbox"/>	0
▶ Driver	£4.20	£6.30	£8.40	<input type="checkbox"/>	0

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
▶ Driver			

At the bottom right, there is an 'Export as' dropdown set to 'Hours'. The bottom of the window has buttons for 'Tools...', 'New', 'Edit', 'Delete', and 'Close', along with radio buttons for 'Edit rules' (selected) and 'Default hourly rate'.

The order in which the rules appear is significant, and it is important to consider how the order might affect the way in which the rules are applied.

When generating invoices or wages, CareFree gathers data from the rota. It runs the data through the verify screen to ensure that what was planned by the coordinators is what has actually happened in reality. It then looks at the rules screen and applies the rates which have been created for pay and charge.

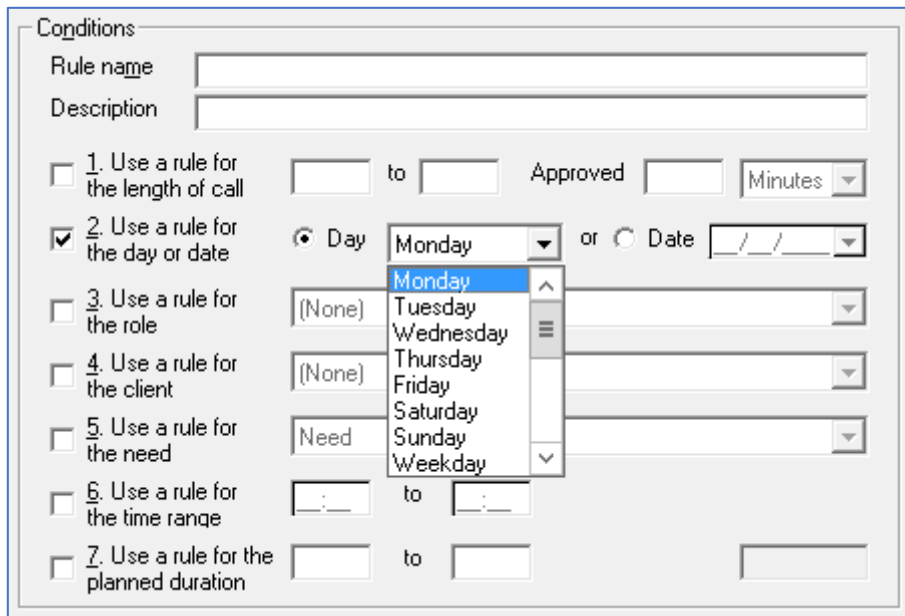
**It is important to realise that when CareFree looks at these rules, it looks at the list from the top down to the bottom.**

This means that the more specific/unique rules need to be positioned higher up the list than the more general “catch all” rules which can be added towards the bottom. The order of rules lists will be examined in more detail throughout this learning guide.

Go to [page 35](#) for more information on the rules list order.

## Rule #2 – Use a Rule for the Day or Date

As the name suggests it is possible to use option rule 2 to create rules which relate to specific days or dates. The options available are listed under the drop-down menu.

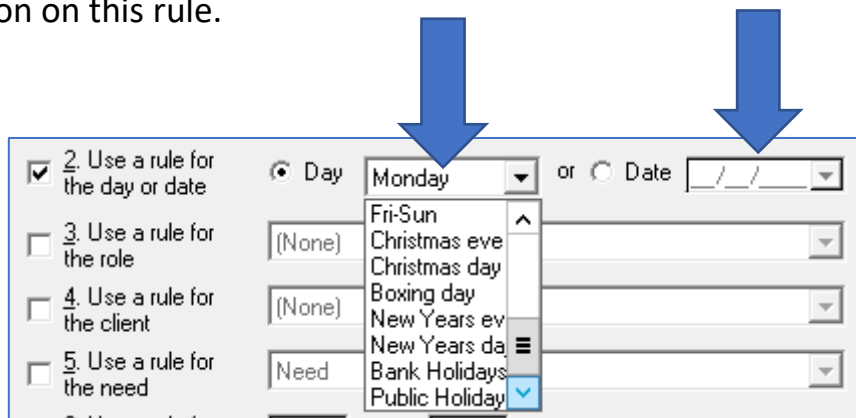


The screenshot shows a 'Conditions' dialog box with the following elements:

- Rule name: [Text Field]
- Description: [Text Field]
- 1. Use a rule for the length of call: [ ] to [ ] Approved [ ] Minutes [ ]
- 2. Use a rule for the day or date:  Day [Monday] or  Date [ / / ]
- 3. Use a rule for the role: [ ] (None) [ ]
- 4. Use a rule for the client: [ ] (None) [ ]
- 5. Use a rule for the need: [ ] Need [ ]
- 6. Use a rule for the time range: [ ] to [ ]
- 7. Use a rule for the planned duration: [ ] to [ ] [ ]

Any of the options can be used in conjunction with each other to create complex pay structures. Rule 2 is most commonly used to specify different rates for weekdays and weekends.

Other significant dates such as Christmas Eve and New Years Eve can be specified using this rule also. A specific date can be specified by using the Date radio button on this rule.



This screenshot shows the 'Day' dropdown menu expanded, with two blue arrows pointing to the 'Day' radio button and the dropdown list. The dropdown list includes the following options:

- Monday
- Fri-Sun
- Christmas eve
- Christmas day
- Boxing day
- New Years eve
- New Years day
- Bank Holidays
- Public Holiday

## Rule #3 – Use a Rule for a Contract

Rule 3 can be used to specify different rates of pay for Carers when they work for different groups of Clients who are linked by their contract or contract type.

The rule is used mainly by larger organisations with distinct branches or geographical regions where their Carers get paid at different rates depending on which branch/region they are working in.

If your organisation works in this way, it is essential to give some thought to how Client contracts and contract types are structured from the outset, as this will have an impact on both Client invoices and Carer wages

### Yorkshire Carers Example

- *‘Yorkshire Carers’ has 2 distinct geographical regions with separate branch offices:*
  - *Yorkshire Carers Leeds*
  - *Yorkshire Carers Huddersfield*
- *For the majority of the time, the Carers at Yorkshire Carers Leeds work for Clients in Leeds and get paid £9.50 per hour pro-rata*
- *Again, for the majority of the time, the staff at Yorkshire Carers Huddersfield work for Clients in Huddersfield and get paid £9.00 per hour pro-rata*
- *In times of peak demand staff may have to travel away from their ‘home’ branch to work for Clients at the other Yorkshire Carers office*
  - *When Leeds based staff work in Huddersfield, they get paid the Huddersfield rate of £9.00 per hour pro-rata*
  - *When Huddersfield based staff work in Leeds, they get paid the Leeds rate of £9.50 per hour pro-rata*

It is possible to cover the scenario above by creating Client Contract Types which are branch or region specific.

If Yorkshire Carers provide care to both private and social services Clients at each branch, they could create 4 contract types:

- Yorkshire Carers Leeds Private
- Yorkshire Carers Leeds Social Services
- Yorkshire Carers Huddersfield Private
- Yorkshire Carers Huddersfield Social Services

To understand how to create the invoicing rates for the contracts above, please see [page 6](#)

This contract type structure will enable Yorkshire Carers to assign Leeds Clients one of the Leeds contract types and Huddersfield Clients one of the Huddersfield contract types, thus dividing the Clients on a geographical basis and allowing the pay rates to be created according to the description above.

To keep some separation between the payroll for staff at each branch, Yorkshire Carers create two payroll roles:

- Yorkshire Carers Leeds Care Worker
- Yorkshire Carers Huddersfield Care Worker

The pay rates for each role are then specified as follows:

## Yorkshire Carers Leeds Care Worker Pay Rates

1. After specifying a default hourly rate of £0.01, create a new exception rule called **Leeds Pay Rate** as follows:

The screenshot shows the configuration for the 'Leeds Pay Rate' exception rule. The 'Conditions' section has all seven checkboxes (1-7) un-ticked. The 'Type' table at the bottom shows the following data:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£9.50	£14.25	£19.00	<input checked="" type="checkbox"/>	60
▶ Driver	£9.50	£14.25	£19.00	<input checked="" type="checkbox"/>	60

Leave all the options un-ticked to specify the Leeds Pay Rate. This will be the general "catch all" rate at the bottom of the list once the Huddersfield rates have been specified using exception rules higher up in the list

Enter the rate of £9.50 and leave the pro-rata box ticked

2. Next a rule called **Huddersfield Private Rate** is specified as follows:

The screenshot shows the configuration for the 'Huddersfield Private Rate' exception rule. In the 'Conditions' section, checkbox 3 is checked, and the contract type is set to 'Yorkshire Carers' and '(All Yorkshire Carers Huddersfield Private)'. The 'Type' table at the bottom shows the following data:

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£9.00	£13.50	£18.00	<input checked="" type="checkbox"/>	60
▶ Driver	£9.00	£13.50	£18.00	<input checked="" type="checkbox"/>	60

Use rule 3 and select the 'Yorkshire Carers Huddersfield Carers' contract type in the first drop-down menu. By selecting '(All Yorkshire Carers Huddersfield Private)' in the second drop-down box, it ensures that any calls for any clients with the contract type will be paid at this rate

Enter the rate of £9.00 and leave the pro-rata box ticked

3. Finally, a rule called **Huddersfield Social Services Rate** must also be specified:

The screenshot shows a software interface for configuring pay rules. On the left, there is a table of Exception Rules:

Exception Rule	Normal	B/Hol	P/Hol
Leeds Pay Rate	9.50	14.25	19.00
Huddersfield Private Rate	9.00	13.50	
Huddersfield Social Services Rate	9.00		18.00

On the right, the 'Conditions' panel for the 'Huddersfield Social Services Rate' rule is shown. It includes a 'Rule name' field, a 'Description' field, and seven checkboxes for different conditions. The third checkbox, 'Use a rule for the contract', is checked. Below it, two drop-down menus are visible: the first is set to 'Yorkshire Car' and the second is set to '(All Yorkshire Carers Huddersfield Social Services)'. A blue callout box points to the first drop-down menu with the text: 'Use rule 3 and select the 'Yorkshire Carers Huddersfield Social Services' contract type in the first drop-down menu. By selecting '(All Yorkshire Carers Huddersfield Social Services)' in the second drop-down box, it ensures that any calls for any clients with the contract type will be paid at this rate'.

Enter the rate of £9.00 and leave the pro-rata box ticked

The 3 rates will cover Leeds Carers pay at the two distinct rates for the two geographical regions.

As the exception rules for Huddersfield pay rates are more specific, they must be placed above the rate for Leeds in the list of rules. Use the arrows next to the rules or right-click the rule to move the **Leeds Pay Rate** rule to the bottom of the list.

The screenshot shows the Exception Rules table with a context menu open over the 'Leeds Pay Rate' rule. The menu has two options: 'Move to top of list' and 'Move to bottom of list'. The 'Leeds Pay Rate' rule is currently at the top of the list, and the 'Huddersfield Social Services Rate' rule is at the bottom.

With the Leeds Pay Rate rule at the bottom of the list, any Huddersfield calls will be picked up by the first two exception rules. Any remaining (Leeds) calls will skip through the list to be picked up by the final rule which was specified without using any of the rules (i.e. without any exceptions).

Rule 3 is also used where carers are paid at different rates depending on whether they are working in predominantly rural or urban areas. Contract types can be created and prefixed as Rural or Urban



## Rule #4 – Use a Rule for the Client

Rule 4 can be used to create unique pay rates for particular Clients. It may be used where an individual Client has particularly acute or intensive care needs and a Carers salary should to be uplifted accordingly.

Pay ▼

Yorkshire Carers Leeds Care Worker ▼

Date range	Normal	Code	B/Hol	Code	P/Hol	Code
01/01/2019-31/12/2099	£0.00		£11.70		£15.60	

Exception Rule	Normal	B/Hol	P/Hol
Sue Barker Rate	10.00	15.00	20.00
Huddersfield Private Rate	9.00	13.50	18.00
Huddersfield Social Services Rate	9.00	13.50	18.00
Leeds Pay Rate	9.50	14.25	19.00

Conditions

Rule name

Description

1. Use a rule for the length of call  to  Approved  Minutes ▼

2. Use a rule for the day or date  Day  or  Date  /  /

3. Use a rule for the contract  to

4. Use a rule for the client

5. Use a rule for the need  to

6. Use a rule for the time range  to

7. Use a rule for the planned duration  to

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£10.00	£15.00	£20.00	<input checked="" type="checkbox"/>	60
▶ Driver	£10.00	£15.00	£20.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
▶ Driver			

Export as  ▼

As rules relating to individual Clients are very specific exceptions, they will usually need to be placed at the top of the rules list as in the example above.

## Rule #5 – Use a Rule for the Need

Rule 5 is an incredibly useful way of creating pay rates for specific types of care calls or services. It is most commonly used to apply fixed payments for services such as live-in care or sleeping nights.

**You must ensure that your co-ordinators understand the importance of adding the appropriate needs to calls on Client rotas, as omitting or incorrectly entering needs will have implications for Carer wages where rule 5 has been used.**

If we wanted to apply a fixed payment of £25 for a sleeping night:

- **Sleeping Night** must be added to the Needs list in the Items screen
- The need **Sleeping Night** is added to overnight shifts on Client rotas
- Rule 5 can then be used to specify fixed charge of £25
- To ensure the charge is fixed at £25, regardless of the length of the call on the rota, the pro-rata option must be un-ticked

Conditions

Rule name: Sleeping Night

Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes

2. Use a rule for the day or date  Day [ ] or  Date [ ]

3. Use a rule for the contract [None] [None]

4. Use a rule for the client [None]

5. Use a rule for the need Need Sleeping Night

6. Use a rule for the time range [ ] to [ ]

7. Use a rule for the planned duration [ ] to [ ] 32.5

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata
▶ Non-driver	£25.00	£37.50	£50.00	<input type="checkbox"/>
Driver	£25.00	£37.50	£50.00	<input type="checkbox"/>

Codes	Normal Rate	Bank Holiday	Public Holiday
▶ Non-driver			
Driver			

Export as: Hours

## Rule #6 – Use a Rule for a Time Range

Rule 6 makes it possible to set different rates of pay for calls at different times of the day/night. This option is frequently used by organisations who pay a premium rate for calls at unsocial times of the day.

For example, if your organisation’s standard daytime rate was £8 per hour between the hours of 8am and 6pm (daytime rate), then outside of those times you paid £8.50 (evening and night rate), you would create two rules using option 6 as follows:

### Social Hours Rule

Conditions

Rule name: Daytime Rate  
Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes [v]  
 2. Use a rule for the day or date Day [ ] or Date [ / / ]  
 3. Use a rule for the contract [None] [None]  
 4. Use a rule for the client [None]  
 5. Use a rule for the need Need [ ] [None]  
 6. Use a rule for the time range 08:00 to 18:00  
 7. Use a rule for the planned duration [ ] to [ ] [1-2]

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.00	£12.00	£16.00	<input checked="" type="checkbox"/>	60
▶ Driver	£8.00	£12.00	£16.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday	Export as
▶ Non-driver				Hours [v]
▶ Driver				

### Un-Social Hours Rule

Conditions

Rule name: Evening and Night Rate  
Description:

1. Use a rule for the length of call [ ] to [ ] Approved [ ] Minutes [v]  
 2. Use a rule for the day or date Day [ ] or Date [ / / ]  
 3. Use a rule for the contract [None] [None]  
 4. Use a rule for the client [None]  
 5. Use a rule for the need Need [ ] [None]  
 6. Use a rule for the time range 18:00 to 08:00  
 7. Use a rule for the planned duration [ ] to [ ] [32-7]

Type	Normal Rate	Bank Holiday	Public Holiday	Pro-rata	By
▶ Non-driver	£8.50	£12.75	£17.00	<input checked="" type="checkbox"/>	60
▶ Driver	£8.50	£12.75	£17.00	<input checked="" type="checkbox"/>	60

Codes	Normal Rate	Bank Holiday	Public Holiday	Export as
▶ Non-driver				Hours [v]
▶ Driver				

## **Rule #7 – Use a Rule for the Planned Duration**

Rule 7 is used in quite specific circumstances by organisations who have implemented electronic call monitoring. It can be used to create a set of financial rules where the following criteria apply:

Calls are banded because payments are not calculated as straight hourly pro-rata rates

If the actual duration of the call falls below the planned duration (i.e. call monitoring data shows that the Carer did not stay for the full duration of the call) the call is still paid at the full planned duration rate

Where the actual duration of the call is greater than the planned duration (i.e. call monitoring, data shows that the Carer overstayed on the call) the call is paid at the actual duration rate. See [page 26](#) for full instructions.

## **Using Multiple Options to Create Complex Rate Structures**

It is possible to accommodate complex pay rate structures by specifying rules which use multiple options together. Again, this has been covered in detail in relation to invoicing and the method is exactly the same when specifying pay rates. Please see [page 33](#) for further instructions.

## **The Importance of the Order of the Exception Rules List**

Please see [page 35](#) for further instructions relating to the order of the exception rules list.

# Generating Invoices in CareFree

Calculating, previewing, outputting and finalising invoices are all functions which are performed using CareFree's reports screen. In this section we provide step by step instructions for generating invoices once all the invoicing rates have been created using rules.

## Pre-Invoicing Checks

Before attempting to calculate invoicing data in CareFree, it is essential to check a number of things have been configured and completed correctly.

## Checking the Rota

For detailed instructions of how CareFree's Rota works, please refer to our Day 1 and Day 2 training guides. It is important to confirm that all call data on the rota has been entered correctly:

- **Call times** and **durations** must be checked
- Any **needs** which affect pay or charge rules must have been added to calls correctly
- Has the **correct Carer** been allocated to the call?
- Have the calls been created using the **correct Client contracts**?
- Have all **cancellations** or Client/Carer **absences** been added to the rotas correctly?

## Checking the Verify Screen

For detailed instructions of how the Verify screen works, please refer to our Day 2 training guide. It is important to confirm that all call data is processed correctly in Verify, before it is used to calculate invoices:

- If using electronic call monitoring, check **actual times & durations** are populated & correct
- Check **call statuses & override statuses** are correct for invoicing purposes
- Pay particular attention to **NCR calls** and ensure an **override status** has been applied to any **chargeable cancellations**

## Checking the Rules

Finally, it is worth double checking the rates which have been entered in CareFree's Rules screen:

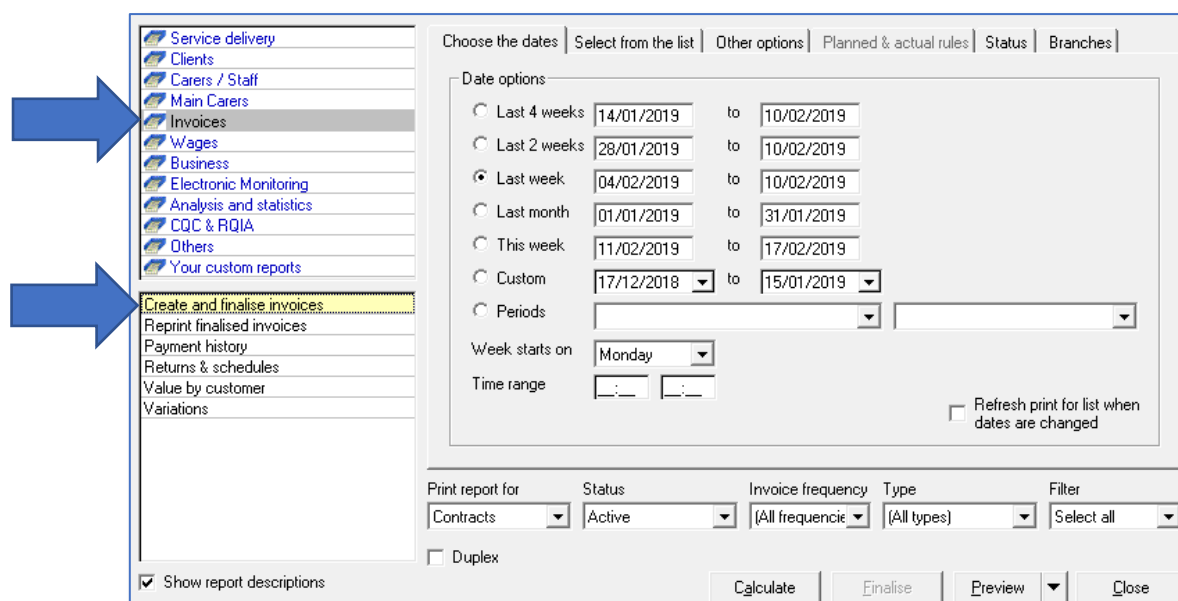
- Check the **charge rates** have been entered correctly
- Check the correct **rules** have been ticked and completed correctly
- Check any **day/date/time ranges** are entered accurately
- Check the **list order** will correctly isolate exceptions before applying 'catch all' rates

# Calculating & Previewing Invoices

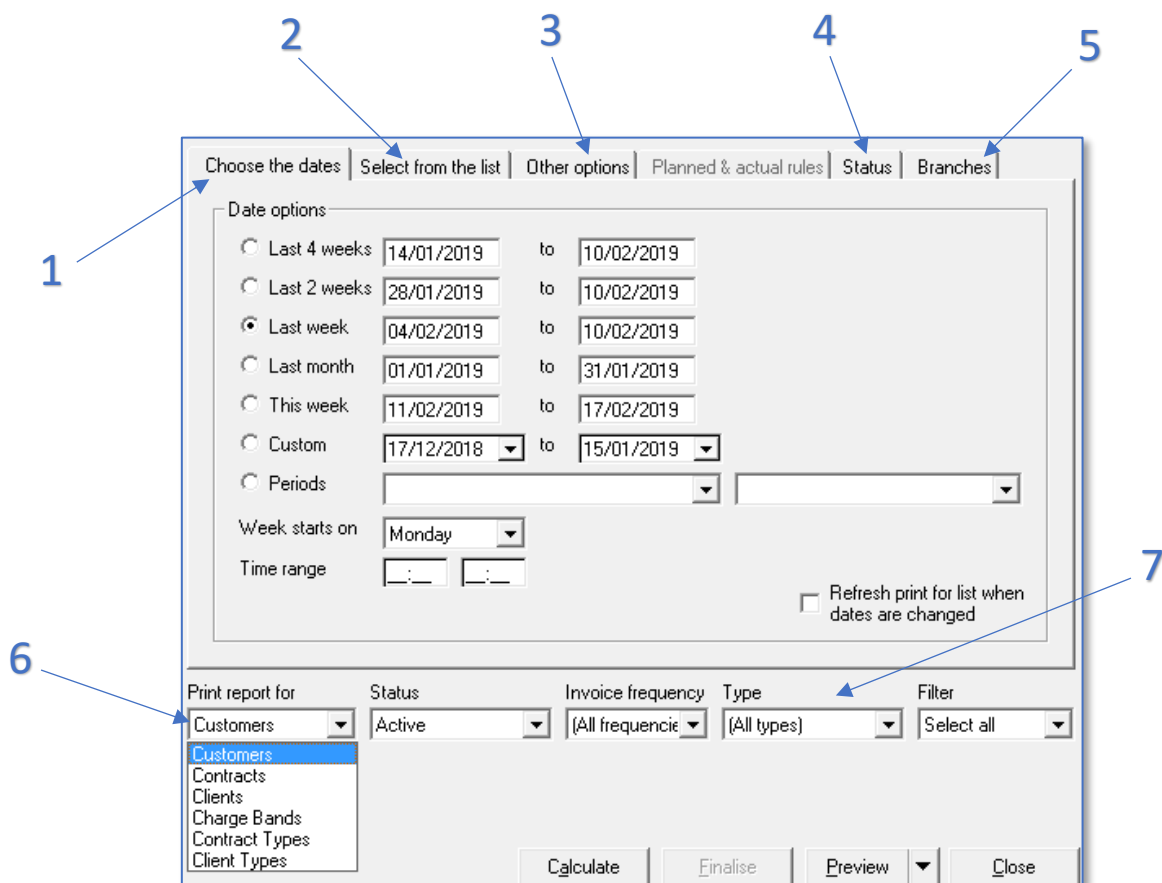
To begin generating invoices:



1. Click on **Reports**
2. Select the **Invoices** reports grouping
3. Select the **Create and Finalise Invoices** report



4. Use the tabs and options on the right-hand side of the screen to specify which data should be included in the invoices you generate



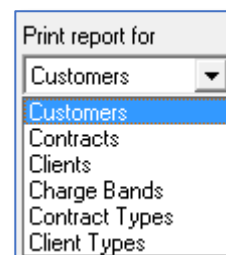
1	Select the Invoicing date range using the <b>Choose the Dates</b> tab. Use this in conjunction with the Select from the List tab if you have different invoicing periods for different groups of Clients/funders
2	Use the <b>Select from the List</b> tab to include/exclude individual Clients/groups of Clients/funders/contract types from the invoices you are generating
3	Use <b>Other Options</b> to specify an invoice date, payment date, choose the next invoice number and select a format to output the invoices in
4	Use the <b>Status</b> tab to include/exclude call statuses
5	Use the <b>Branches</b> tab to include/exclude companies & branches from the Invoice run. The Select from the List tab will alter to reflect your choices
6	Use the <b>Print Report For</b> drop-down to choose what grouping to display in the Select from the List tab
7	Drop-down boxes allow further filtering of data depending on the options selected



## Choose the Dates, Select from the List & Branches Tabs

Choosing a date range and selecting a group of people to include in the invoicing works in exactly the same way it does in all other CareFree reports. The Create and Finalise Invoices report provides complete flexibility in terms of invoicing different groups of Clients/funders over different invoicing cycles/periods.

Use the **Print Report For** drop down menu and the Branches tab to filter the data which appears in the Select from List Tab.



## Other Options Tab

1	Select the <b>Invoiced Date</b> here. This date can be output on the invoice and can be used to find and reprint previously finalised invoices
2	The payment due date can be entered here and output onto the invoice
3	If you want to follow on from a previous invoice number sequence, enter the next invoice number here
4	An alpha prefix for the invoice number can be entered here
5	Select the invoice format here. CareFree will create an invoice format for your organisation to use. Standard formats are available along with the invoice summary and audit reports

## Status Tab

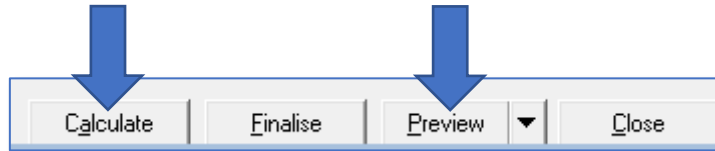
1

2

1	Select the call statuses (from the Verify screen) which you wish to include on your invoice
2	If you use call monitoring and your invoicing is completed using <u>actual</u> call times, ensure the option to <b>Use Actual Times for Charging</b> is ticked

## To Display the Invoicing Report

1. To view the data you have selected, you must first click the **Calculate** button
2. To display the report (in the format you selected on the Other Options tab) click the **Preview** button



Depending on the format selected, either an individual invoice for each Client will be displayed, or an overall summary document for all Clients will appear.

## Standard Invoice Format

Customer		Client	Invoice No	00096
Hertfordshire County Council 1 Bushy Mill Lane Watford Hertfordshire WD24 7AB		Mr Thierry Henry 80 Crispsey Avenue Ongar Essex CM5 0AR	Invoice date	18/02/2019
			Due date	18/03/2019
			Your reference	
			From	11/02/2019
			To	17/02/2019

Date	Times	Description	Carer	Hours	Net
11/02/2019	08:00-07:00	Morning Call - Get Up And Breakfast	Reynolds, Ryan	01:00	£0.01
11/02/2019	09:00-10:00	Personal Care, Shopping	Overmars, Marc	01:00	£16.75
11/02/2019	15:30-16:00	Personal Care	Davis, Laura	00:30	£13.00
11/02/2019	18:00-19:00	Tea Time Call	Marley, Bob	01:00	£15.75
11/02/2019	22:00-23:00	Put To Bed - Secure Premises	Tester, James	01:00	£0.01
12/02/2019	08:00-07:00	Morning Call - Get Up And Breakfast	Reynolds, Ryan	01:00	£0.01
12/02/2019	09:00-10:00	Personal Care, Shopping	Overmars, Marc	01:00	£16.75
12/02/2019	15:30-16:00	Personal Care	Davis, Laura	00:30	£13.00

## Invoice Summary Format

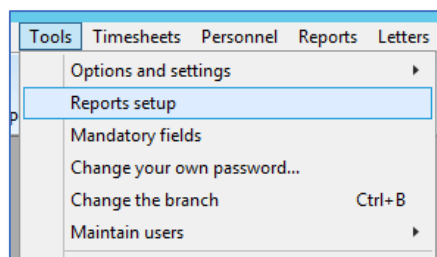
18/02/2019		CareFree Care Show - Invoice Summary						Page 1 of 2	
11-Feb-2019 to 17-Feb-2019									
Client	Ref	Invoice No	Date	Hours	Net	Exp	Mileage	Gross	
Miss Mabel Able	1000	00081	18/02/2019	00:00	180.00	0.00	£0.00	180.00	
Mrs Elizabeth Alexandra-Mar		00082	18/02/2019	28:00	1,549.80	0.00	£0.00	1,549.80	
Mr Lance Armstrong		00083	18/02/2019	00:00	180.00	0.00	£0.00	180.00	
Miss Sue Barker		00084	18/02/2019	01:00	72.50	5.50	£0.00	78.00	
Barry Chuckle		00085	18/02/2019	04:00	636.16	0.00	£0.00	636.16	

We are happy to create an invoice format which matches the requirements of your organisation. Your company logo can be included and data can be output and grouped to suit the needs of your clients/funders

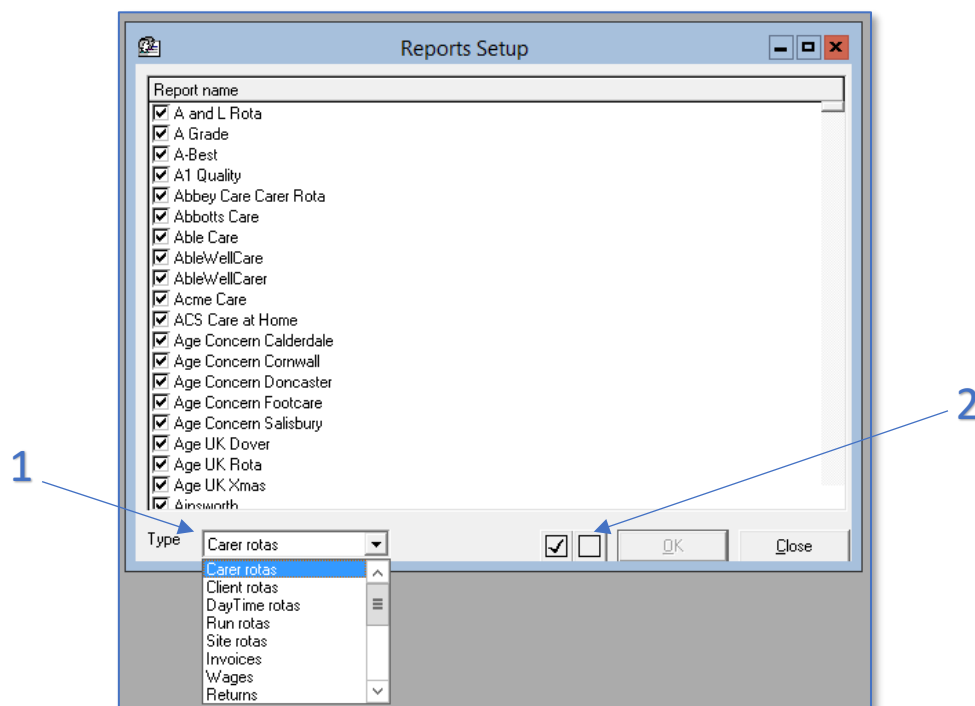
## Viewing Invoice Formats Previously Created by CareFree

To help with deciding on a suitable invoice format for your organisation, it is possible to access the formats we have previously created for our customers.

1. Go to the **Tools** menu
2. Select **Reports Setup**



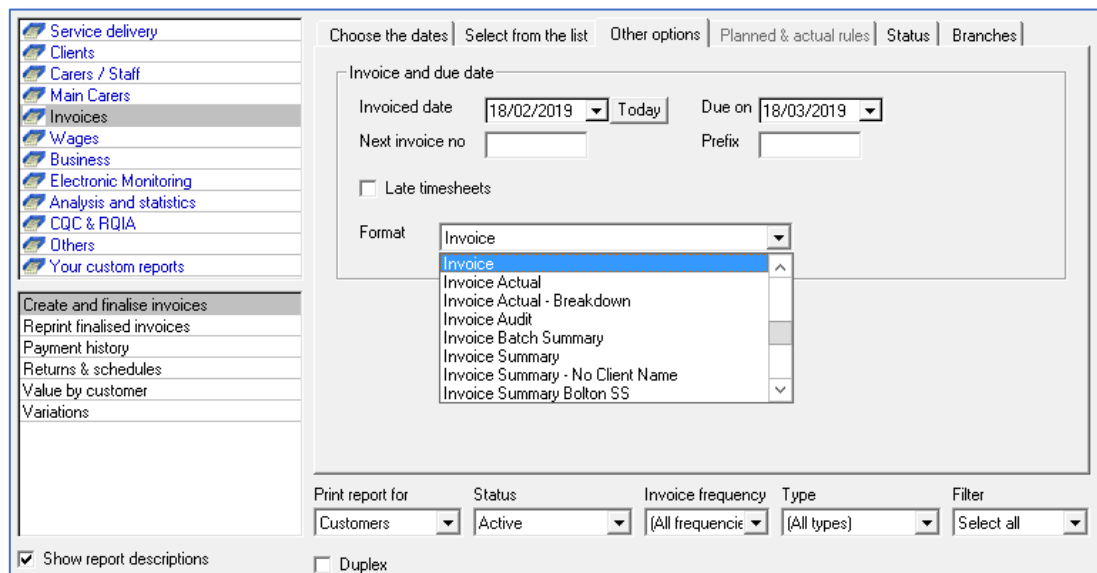
The **Reports Setup** screen will open:



1	Use the Type drop-down box menu at the bottom of the screen to select Invoices
2	With the Invoice list selected, use the tick at the bottom right of the screen to select all formats and then click <b>OK</b>

You will need to close the Reports screen and go back into it for the list of formats to refresh

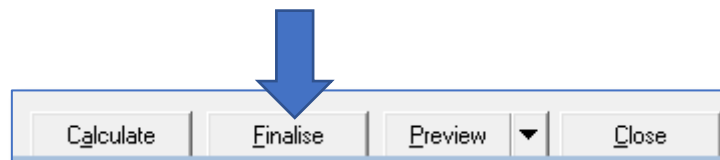
Now if you try to run the **Create and Finalise Invoices** report, you should be able to select the different invoice formats using the Format drop-down menu within the **Other Options** tab.



To request an invoice format for your organisation, please contact the CareFree support team on 0845 862 0405 or email [support@carefreegroup.com](mailto:support@carefreegroup.com) and ask for a Report Request form to be sent to yourself.

## Finalising the Invoice

Check the data in the invoices carefully by using the Calculate and Preview buttons. You can calculate and preview data as many times as is required. This helps to cross check invoices against calls on the Rota, information in the Verify screen and the rates created in the Rules. When you have confirmed that all data is correct, you must click the **Finalise** button to close off the invoicing period and lock the data on the Rota/Verify screens.



When invoices are finalised, the invoice numbers are assigned and all the Clients included in the invoice will have an entry added to their record in the Invoices tab of the Clients screen.

# Generating Wages in CareFree

Calculating, previewing, outputting and finalising wages are all functions which are performed using CareFree's Reports screen. In this section we provide step by step instructions for generating wages once all pay rates have been created using Rules.

## Pre-Payroll Checks

Before attempting to calculate payroll data in CareFree, it is essential to check a number of things have been configured and completed correctly.

## Checking the Rota

For detailed instructions of how CareFree's Rota works, please refer to our Day 1 and Day 2 training guides. It is important to confirm that all call data on the rota has been entered correctly:

- **Call times** and **durations** must be checked
- Any **needs** which affect pay or charge rules must have been added to calls correctly
- Has the **correct Carer** been allocated to the call?
- Have the calls been created using the **correct Client contracts**?
- Have all **cancellations** or Client/Carer **absences** been added to the rotas correctly?

## Checking the Verify Screen

For detailed instructions of how the Verify screen works, please refer to our Day 2 training guide. It is important to confirm that all call data is processed correctly in Verify, before it is used to calculate invoices:

- If using electronic call monitoring, check **actual times & durations** are populated & correct
- Check **call statuses & override statuses** are correct for payroll purposes
- Pay particular attention to **NCR calls** and ensure an **override status** has been applied to any cancellations for which the Carer is still due a payment

## Checking the Rules

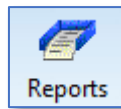
Finally, it is worth double checking the rates which have been entered in CareFree's Rules screen:

- Check the **pay rates** have been entered correctly
- Check the **correct options** have been **ticked and completed** correctly
- Check any **day/date/time ranges** are entered accurately
- Check the **list order** will correctly isolate exceptions before applying 'catch all' rates

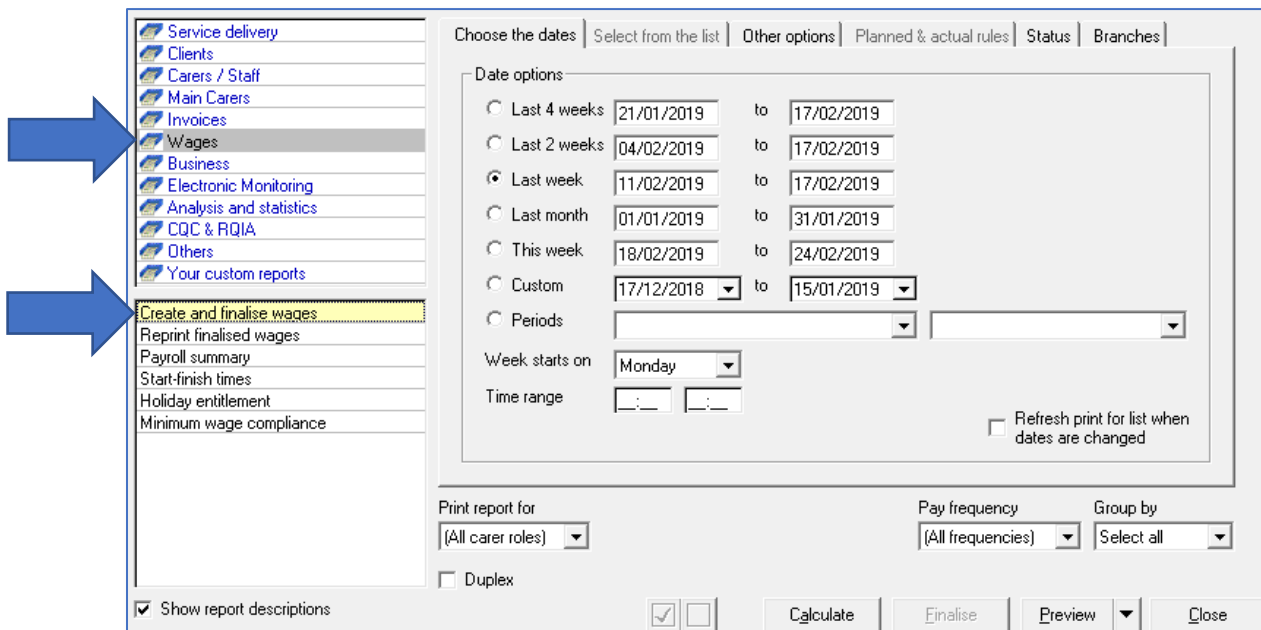


# Calculating & Previewing Wages

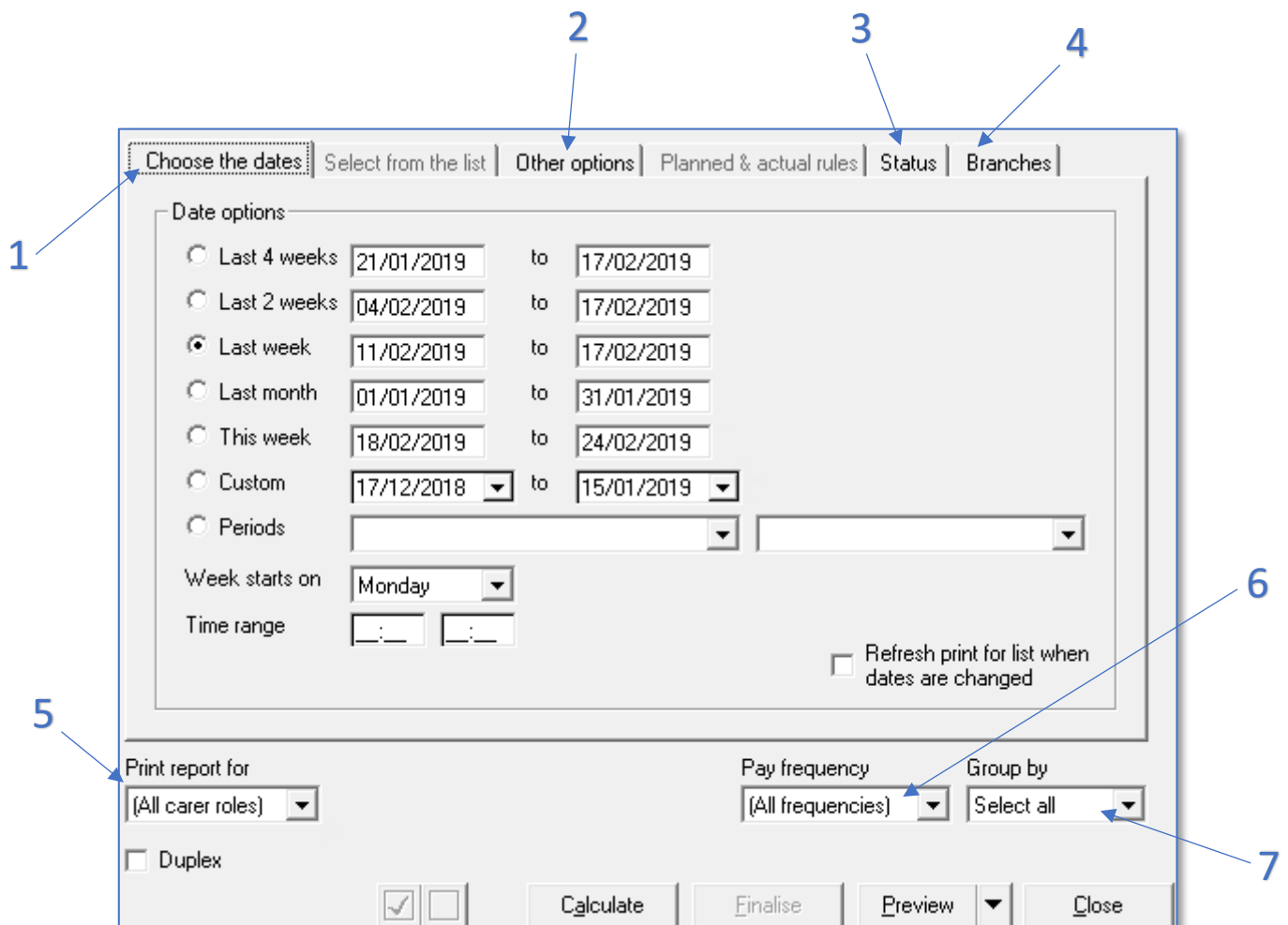
To begin generating wages:



1. Click on **Reports**
2. Select the **Wages** reports grouping
3. Select the **Create and Finalise Wages** report



4. Use the tabs and options on the right-hand side of the screen to specify which data should be included in the wages you generate



1	Select the payroll date range using the <b>Choose the Dates</b> tab. Use this in conjunction with the Other Options tab if you have different payroll periods for different groups of staff
2	Use the <b>Other Options</b> tab to include/exclude individual Carers/groups of Carers from the wages you are generating
3	Use the <b>Status</b> tab to include/exclude call statuses
4	Use the <b>Branches</b> tab to include/exclude companies & branches from the wages run. The Other Options tab will alter to reflect your choices
5	Use the <b>Print Report For</b> drop-down to filter the list of Carers in the Other Options tab by Role
6	If you have specified <b>Pay Frequencies</b> for staff members in the Payroll tab in the Carers screen, you can filter the list of staff in the Other Options tab using this drop-down
7	The <b>Group By</b> drop-down filters the list of staff to show all those who can be emailed and those requiring hard copy wages

## Choose the Dates

Choosing a date range works in exactly the same way it does in all other CareFree reports. It is possible to specify different date ranges for different groups of employees if your organisation does not have a universal payroll period across the workforce.

## Other Options Tab

1	Set the payroll run date here. This date can be output on the Carer's wage sheets
2	Tick the <b>Mileage</b> tick box if you use CareFree to calculate mileage and you wish to include mileage payments as expenses on wage sheets
3	Input the next wage sheet number here if you want CareFree to continue with an existing number sequence from another payroll system
4	Select or de-select Carers to include/exclude them from the wages run
5	Select the wage sheet format here

## Status Tab

1 →

2 →

Choose the dates | Select from the list | Other options | Planned & actual rules | Status | Branches

- ✓ Completed
- ✗ Missed
- NCR
- I Invoice
- W Wages
- A Aborted
- P Penalty
- C Cancelled
- 🕒 Waiting
- ? Unknown

Use actual times for pay

Use actual times for charging

Ignore call status when calculating

Print report for: (All carer roles) ▼

Pay frequency: (All frequencies) ▼

Group by: Select all ▼

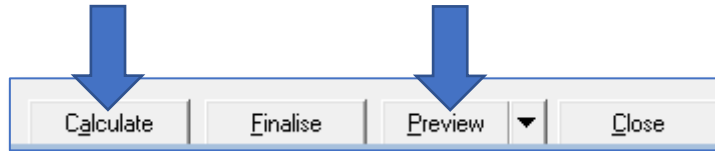
Duplex

Calculate Finalise Preview ▼ Close

1	Select the call statuses (from the Verify screen) which you wish to include on your invoicing run
2	If you use call monitoring and your invoicing is completed using <u>actual</u> call times, ensure the option to Use <b>Actual Times for Charging</b> is ticked

## To Display the Wages Report

1. To view the data you have selected, you must first click the **Calculate** button
2. To display the report (in the format you selected on the Other Options tab) click the **Preview** button



Depending on the format selected, either an individual wage sheet for each Carer will be displayed, or an overall summary document for all Carers will appear.

## Standard Wage Sheet Format

Tel: Fax: WAGE SHEET					
Carer			Wage sheet No	00063	
Dr 5.5.7 carer 5.5.7 Carer 1233 The Street WF5 0RT			Date	19/02/2019	
			Your reference	1122	
			From	11/02/2019	
			To	17/02/2019	
Date	Times	Client	Description	Hours	Pay
11/02/2019	16:00-17:00	Mandy Williamson	Tea Time Call	1:00	£8.00
13/02/2019	16:00-17:00	Mandy Williamson	Tea Time Call	1:00	£8.00
13/02/2019	20:00-21:00	Mandy Williamson	Put To Bed - Secure Premises, Wash Hair	1:00	£8.00
14/02/2019	16:00-17:00	Mandy Williamson	Tea Time Call	1:00	£8.00
14/02/2019	20:00-21:00	Mandy Williamson	Put To Bed - Secure Premises, Wash Hair	1:00	£8.00
15/02/2019	08:00-09:00	Dickie Bird	Personal Care	1:00	£8.00
15/02/2019	09:30-11:00	Sebastian Coe	Housework, Lunch Call	1:30	£12.00
15/02/2019	16:00-17:00	Mandy Williamson	Tea Time Call	1:00	£8.00

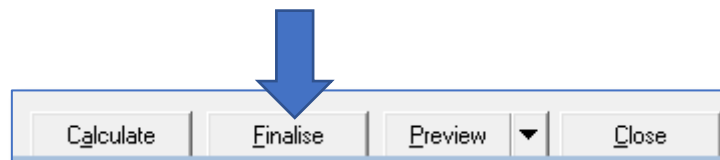
## Invoice Summary Format

19/02/2019 CareFree Care Show - Wage sheet Summary Page 1 of 1									
11-Feb-2019 to 17-Feb-2019									
Carer	Ref no	Sheet no	Date	Hours	Pay	Expenses	Mileage	Salary	Gross
5.5.7 Carer, 5.5.7 carer	1122	00063	19/02/2019	10:30	£88.40	£0.00	£2.37	£0.00	£88.77
Avis, Sharon		00064	19/02/2019	29:45	£273.12	-£20.00	£1.07	£0.00	£254.19
Baldin, Claire		00065	19/02/2019	24:15	£200.02	£0.00	£10.74	£0.00	£210.76
Bergkamp, Dennis		00066	19/02/2019	24:00	£200.00	£0.00	£128.70	£0.00	£328.70
Bishop, John		00067	19/02/2019	13:45	£113.45	£0.00	£7.10	£0.00	£120.55

We are happy to create a wage sheet format which matches the requirements of your organisation. Your company logo can be included and data can be output and grouped to suit the needs of your employees

## Finalising the Wages

Check the data in the wages carefully by using the Calculate and Preview buttons. You can calculate and preview data as many times as is required. This helps to cross check data against calls on the Rota, information in the Verify screen and the rates created in the Rules. When you have confirmed that all data is correct, you must click the **Finalise** button to close off the payroll period and lock the data on the Rota/Verify screens.



When wages are finalised, the wage sheet numbers are assigned and all the Carers included in the wages run will have an entry added to their record in the Wages tab of the Carers screen.

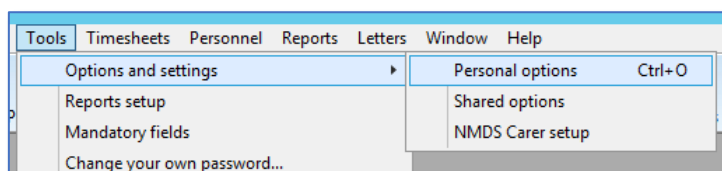
# Using CareFree to Calculate Mileage Payments/Charges

It is possible for Carefree to interface with mapping software in order to automatically calculate distances between calls, journey times and to apply subsequent charges/payments to Client invoices/Carer wages. CareFree currently works with Google Maps to calculate the necessary data. This section will describe how to configure CareFree to calculate distances using mapping software and then how to apply mileage payments to Carer wages. The process for applying charges to Client invoices is very similar.

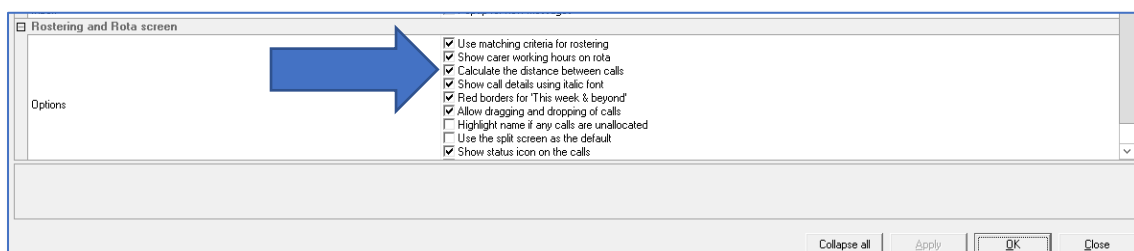
## Configure the Personal Options for Mileage

An option named Calculate the Distance between Calls must be ticked in order for CareFree to calculate mileage. This is a personal option and must be enabled for any user who may need to use this functionality.

1. Go to the **Tools** menu
2. Go to **Options & Settings**
3. Select **Personal Options**



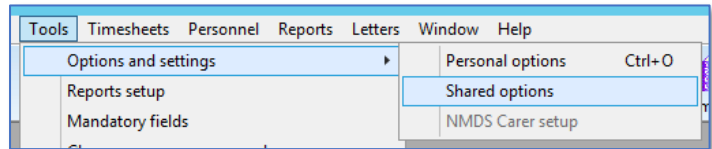
4. Ensure **Calculate the Distance Between Calls** is ticked



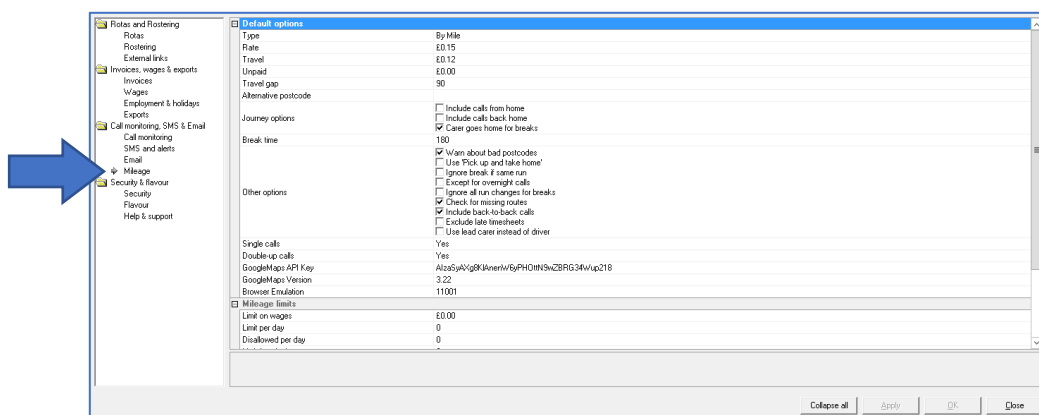
# Configure the Shared Options for Mileage

Numerous shared options can also be set in regards to mileage. Please note, by changing these options it will affect every CareFree user.

1. Go to **Tools**
2. Go to **Options & Settings**
3. Select **Shared Options**

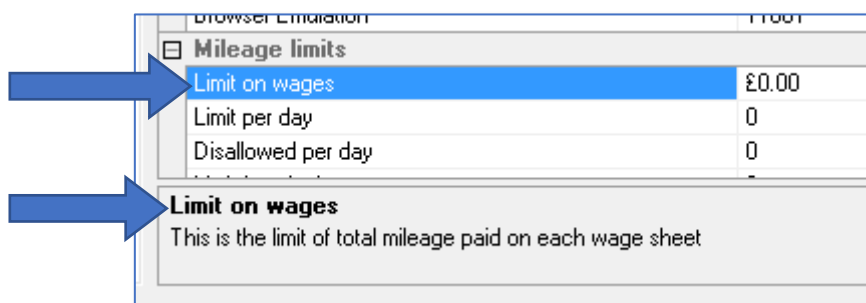


4. Select **Mileage** in the menu on the left-hand side of the screen



5. Configure the options on the right-hand side of the screen

- a. For an explanation of what each option does, click on each one in turn



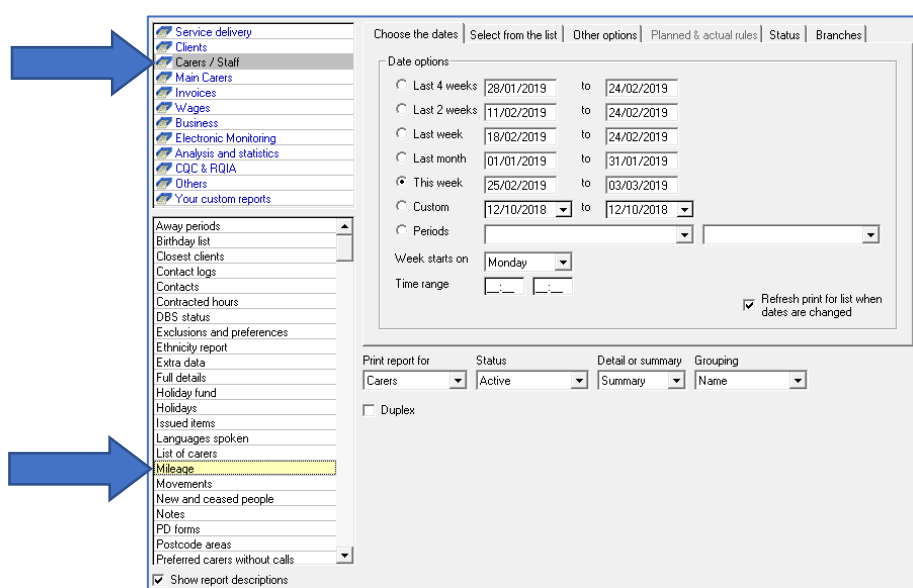
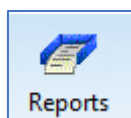


## Calculating Mileage for the First Time

In order to begin displaying mileage/travel time on the rota and using the data to add travel expenses to Carer wages/Client invoices, a Mileage Report must be generated.

To run a mileage report:

1. Open the **Reports** screen
2. Select the **Carers** report group



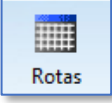
3. Select the **Mileage** report
4. Select a date range using the **Choose the Dates** tab
5. Leave all Carers selected in the **Select from the List** tab
6. Click the **Preview** button to calculate the mileage

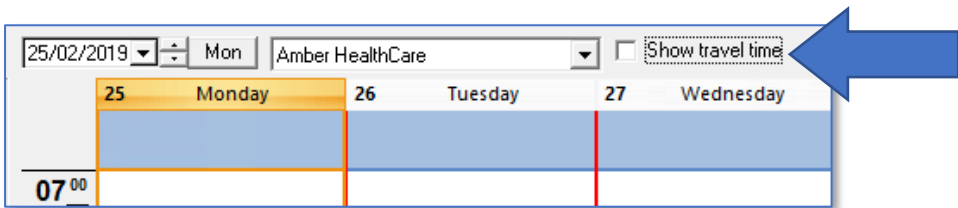
This will perform mileage calculations for all the journeys your Carers are scheduled to make between the dates you selected. Once the distances and travel times for these journeys have been calculated, the information will be stored in CareFree.

**It is good practice to run a mileage report on a weekly basis, once the rotas have been prepared for sending to Carers.**

# Display Distances & Travel Time on Rotas

Once a mileage report has been generated, it is possible to display distances and travel times on the Carers Rota screen:

1. Open the **Rotas** 
2. Click on the **Carers** tab to display the Carers Rotas
3. Tick the **Show Travel Time** tick box



4. Travel times and distances will be displayed in white bubbles between calls

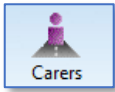
10:00	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care	Perry, Fred 10:00-11:00 Personal Care
11:00	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles
12:00	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call	Barker, Sue 12:00-13:00 Housework, Lunch Call
13:00	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care	Elliott, Peter 13:30-14:00 Personal Care
14:00	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles	26 mins, 15.6 miles
15:00							

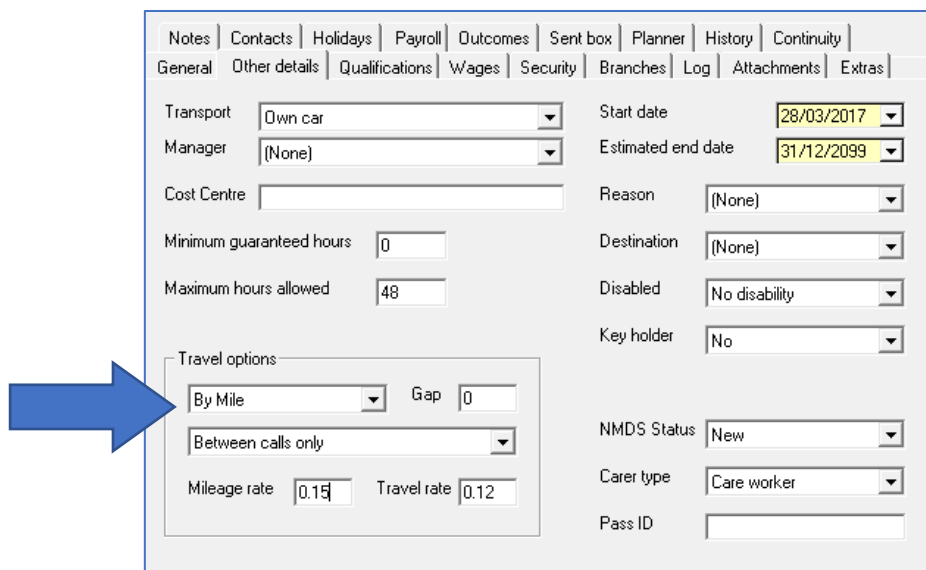
## Including Mileage on Carer Wages

You can set a global mileage payment rate in the Shared Options for mileage. (see [page 80](#)).

If your Carers are paid different rates for mileage, it is possible to override the global setting on an individual Carer basis in the Other Details tab of the Carers screen.

## Setting Individual Mileage Rates/Options for Carers

1. Open the **Carers** screen 
2. Select the **Other Details** tab
3. Specify mileage rates and options under **Travel Options**



The screenshot shows the 'Carers' screen with the 'Other Details' tab selected. The 'Travel Options' section is highlighted with a blue arrow. The 'Travel Options' section includes the following fields:

- Transport: Own car
- Manager: (None)
- Cost Centre: (empty)
- Minimum guaranteed hours: 0
- Maximum hours allowed: 48
- Travel options: By Mile
- Gap: 0
- Mileage rate: 0.15
- Travel rate: 0.12

Other fields visible in the 'Other Details' tab include:

- Start date: 28/03/2017
- Estimated end date: 31/12/2099
- Reason: (None)
- Destination: (None)
- Disabled: No disability
- Key holder: No
- NMDS Status: New
- Carer type: Care worker
- Pass ID: (empty)

## Including Mileage Payments when Calculating Wages

When generating the Carer wages report, it is extremely simple to include payments for mileage based on the options you have configured:

1. Simply select the **Create and Finalise Wages** report in the **Reports** screen
2. Specify which data is to be included on the wages run (see [page 73](#) for instructions)
3. Tick the **Mileage** box on the **Other Options** tab

Choose the dates | Select from the list | **Other options** | Planned & actual rules | Status | Branches

Date and mileage options  
25/02/2019 Today  Mileage  Next no

Carer	Hours	Pay	Expenses	Mileage	Salary	Gross Pay
<input checked="" type="checkbox"/> Avis, Sharon						
<input checked="" type="checkbox"/> Baldin, Claire						
<input checked="" type="checkbox"/> Bergkamp, Dennis						
<input checked="" type="checkbox"/> Bishop, John						
<input checked="" type="checkbox"/> Bloom, Orlando						
<input checked="" type="checkbox"/> Carey, Mariah						
<input checked="" type="checkbox"/> Clas, Mylene						
<input checked="" type="checkbox"/> Cricket, Jiminy						
<input checked="" type="checkbox"/> Dad						
<input checked="" type="checkbox"/> Dench, Judy						
<input checked="" type="checkbox"/> Dicaprio, Leonardo						

Wagesheet

Print report for: (All carer roles) Pay frequency: (All frequencies) Group by: Select all  
 Duplex

Please note that Calculate the Distance Between Calls needs to be enabled for the mileage to come through on the wage sheet – see [page 79](#) for more information

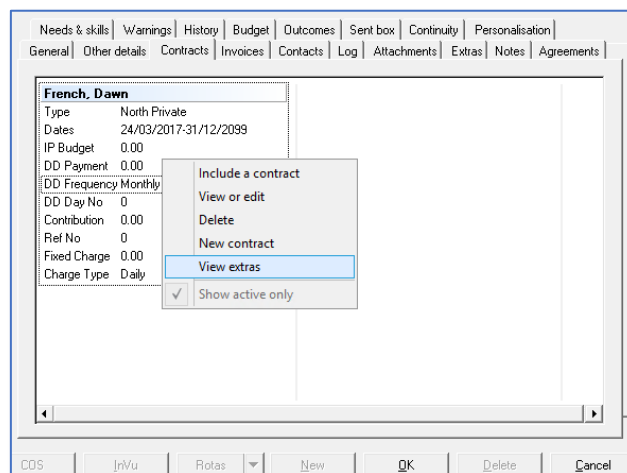
# Adding Fixed Recurring Charges to Client Contracts

In certain circumstances it may be necessary to add a fixed recurring charge to a Client's contract, rather than having charges which vary according to the data on the Client's rota. This is often a more suitable way of creating charges for 24/7 live-in care, or where a fixed charge has been agreed for a care package regardless of the number of visits per week/month.

## Creating a Fixed Charge



1. Open the **Clients** screen
2. Locate the Client in the list on the left-hand side of the screen
3. Select the **Contracts** tab
4. Click the **Edit** button
5. Left-click on the Contract to select it, then right-click to view a list of options



6. Click **View Extras**

7. Specify the charge amount in the **Fixed Charge** box
8. Specify the frequency of the charge (Daily or Weekly) using the **Charge Type** drop down menu and click **Save** to complete

The screenshot shows a dialog box titled "Contract extras" with a currency symbol (£) and a close button (X). The dialog contains a table of contract details for "French, Dawn". The "Fixed charge" is £250.00 and the "Charge type" is set to "Weekly". A dropdown menu is open for "Charge type", showing "Weekly" and "Daily" options. Two blue arrows point to the "Fixed charge" and "Charge type" fields. At the bottom, there are "Save" and "Cancel" buttons.

French, Dawn	
Start date	24/03/2017
End date	31/12/2099
IP Budget	£0.00
DD Payment	£0.00
DD Frequency	Monthly
DD Monthly Day	0
Contribution	£0.00
Order Number	
Client Ref	0
Fixed charge	£250.00
Charge type	Weekly

**Charge type**  
Choose the type of fixed charge

Weekly  
Daily

Save Cancel

9. Click **OK** on the Client screen to save the changes you have made

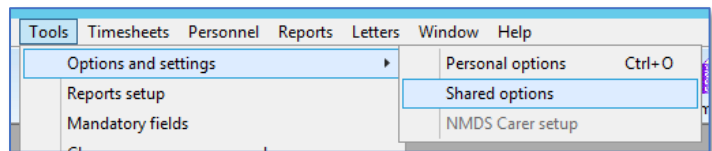
This charge will now be applied every time an invoice is generated for this Client. If for any reason you wish to temporarily vary the amount charge, you will need to either adjust the charge amount on the contract, or apply a manual adjustment (see [page 92](#) for more information).

## Options for Weekly Charge

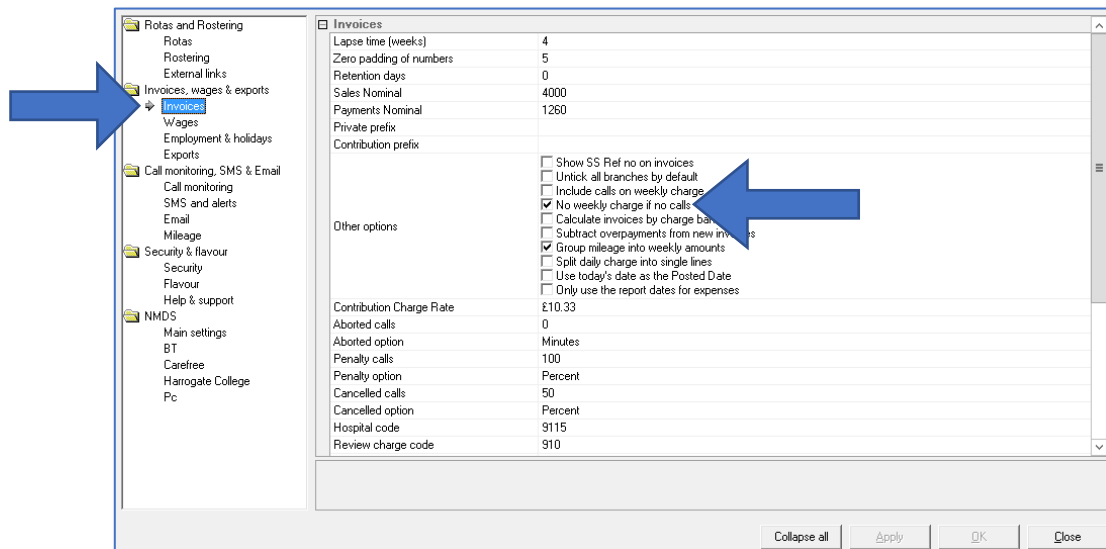
It is possible to specify that the weekly charge should only apply if there are calls on the Client's rota (so that if a Client is away and is not requiring care services, the weekly charge will automatically be de-activated).

To enable this option:

1. Go to **Tools**
2. Go to **Options & Settings**
3. Select **Shared Options**



4. Select **Invoices** in the menu on the left-hand side of the screen



5. Tick **No weekly charge if no calls** and click **OK** to save

# Creating Fixed Salaries for Office Based Staff

It is possible to set fixed salaries for any staff members who are not paid according to the visits they complete. Often this is necessary for office-based staff who occasionally may provide care in times of peak demand.

## Assigning Roles

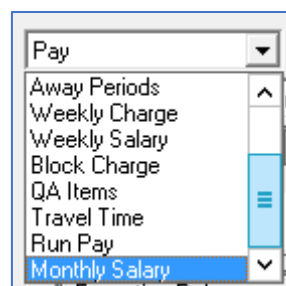
It is important to remember that the Rules for pay are attached to the Role an employee is given in the Payroll tab on the Carers screen. Because salaries tend to be unique to individual employees, it is usually necessary to give all salaried staff members their own unique Role. It is often easier to create Roles which are the same as the names of the individual salaried employees.

For help with setting up new Roles, see **Creating & Editing Payroll Roles in Items** on [page 40](#) and **How Roles Relate to Wages** on [page 41](#).

## Specifying Salaries

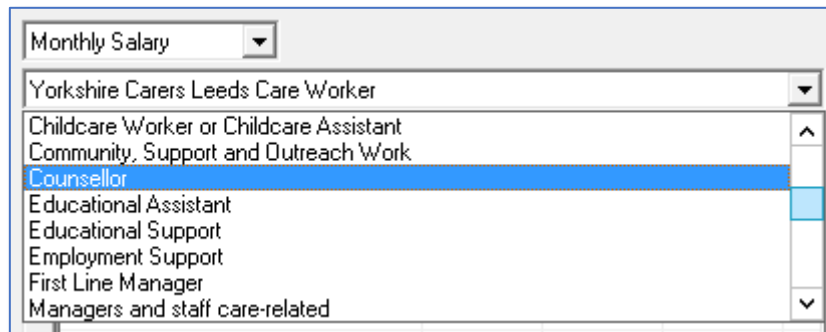
Once your Roles list has been updated and all salaried employees have been assigned their own unique Role, the salaries can be created in the Rules screen.

1. Go to the **Rules** screen
2. In the first drop-down menu at the top left of the screen, either **Weekly Salary**, or **Monthly Salary** can be selected, depending on the frequency of your payroll





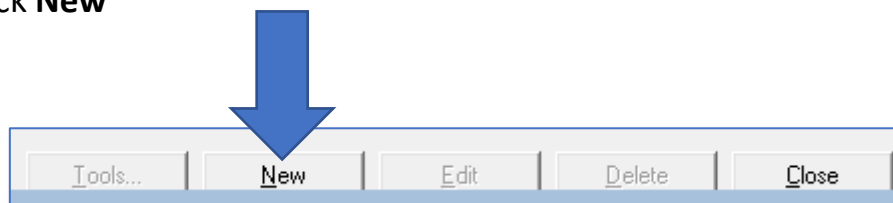
3. In the second drop down menu, select the Role of the staff member for whom you wish to specify a salary.



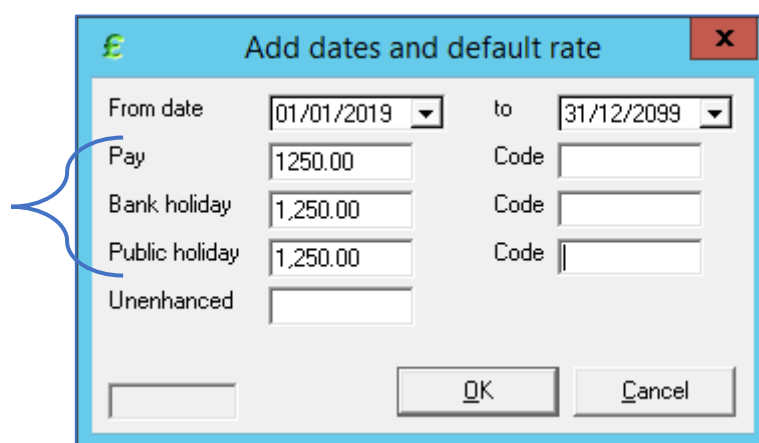
**The main difference between specifying standard pay rules and specifying salaries is that the salary should be entered in the Default Hourly Rate boxes.**

To specify the salary amount:

4. Click **New**



5. Enter the employees monthly or weekly salary in all 3 of the Pay, Bank Holiday and Public Holiday boxes



6. Click **Ok** to save
7. Repeat this process for all salaried employees

# Identifying Bank Holidays & Public Holidays

CareFree allows users to specify different pay and charge rates for calls which take place on Bank Holidays and Public Holidays. This means you could create rates which are structured as follows:

- Calls on standard days are charged at base rates
- Calls on bank holidays are charged at 1.5 x the base rates
- Calls on Christmas day and New Year's Day are charged at 2 x the base rates (and are labelled as Public Holidays in CareFree)

## Specifying the Dates for Bank & Public Holidays

Because the dates for Bank Holidays (and Public Holidays) vary from year to year, the user must update them in the database each year. To specify the dates:



1. Open the **Items** screen
2. In the box at the top left of the screen with the blue text, navigate to and select **Bank Holidays**
3. Click the **Edit** button
4. Click on the date you wish to change to a bank/public holiday
5. Press the **F3** key to change it to a bank holiday (Green) or press the **F4** key to change it to a public holiday (Yellow)
6. Click **OK** to save the changes

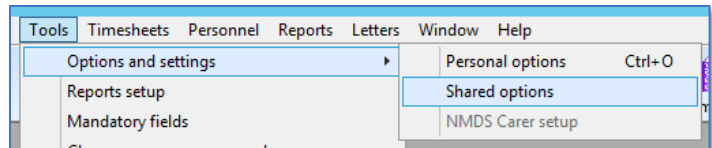
January 2019	February 2019	March 2019	April 2019
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
May 2019	June 2019	July 2019	August 2019
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
September 2019	October 2019	November 2019	December 2019
S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Key  
  F3 Bank holiday  
  F4 Public holiday  
F5 Clear [2]  
Year 2019

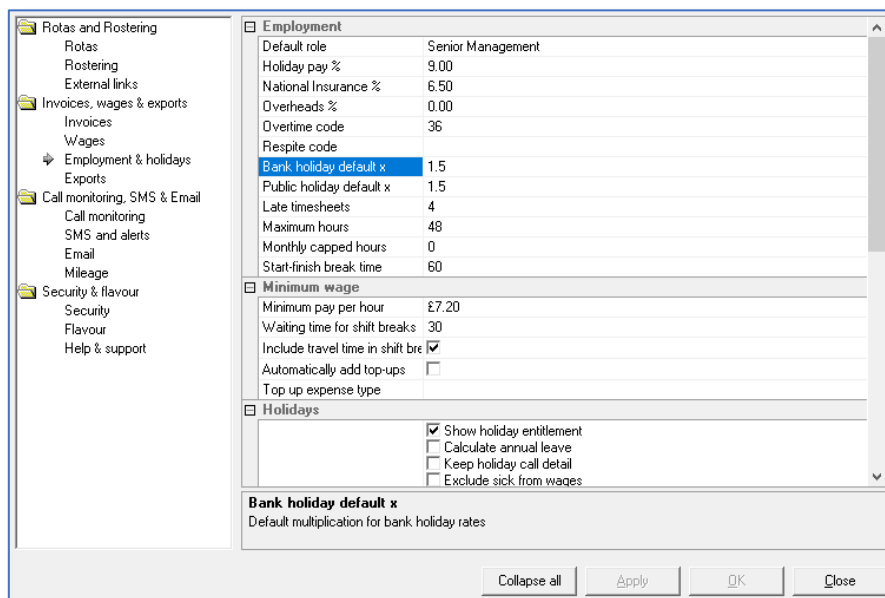
# Shared Options for Bank & Public Holidays

CareFree can work out the rate enhancement for Bank & Public Holidays by what is entered into the Shared Options.

1. Go to **Tools**
2. Go to **Options & Settings**
3. Select **Shared Options**



4. Go to **Employment & Holidays** on the left of the screen



5. In the **Bank Holiday Default x** and **Public Holiday Default x** options enter the enhancement rate. For example, time and a half would be set as 1.5 and double time would be set as 2

This will multiply the normal rate entered against the rule by what is entered in these options i.e. £8 x 2 = £16 (see [page 15](#) for more information on entering a rate).

Please note if you already have rates entered into your rules and the bank/public holiday rate is changed in the shared options, it will not update the existing rates

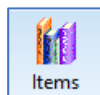
# Making Manual Adjustments to Invoices or Wages

CareFree offers complete flexibility in terms of making manual adjustments to both invoices and wages. Additions & Adjustments are commonly used to make payments for ad-hoc expenses, or apply deductions for uniforms or DBS checks for example. Client invoices can be adjusted to include charges for ad-hoc expenses such as the costs for taxis or parking on excursions.

## Preparing to Make Manual Adjustments

Before creating manual adjustments, it is important to think about the reasons you may need to adjust wages or invoices. Whenever a manual adjustment is made in CareFree, the user must specify the Expense Reason on the adjustment. The reason for the adjustment will appear on invoices or wage sheets.

## Creating and Editing Expense Reasons in Items



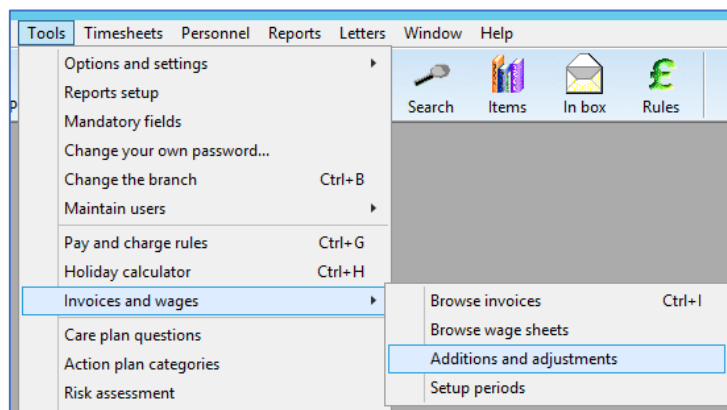
1. Open the **Items** screen
2. Select **Expense Reasons** in the box at the top left with the blue text entries
3. Click **New** to add the new expense reasons to the list, or click **Edit** to amend existing entries
4. Enter the name for the expense reason in the **Category** field

The screenshot shows the 'Expense reasons' form in the CareFree software. On the left, a list of categories is visible, with 'Expense reasons' highlighted. On the right, the form fields are populated with the following information:

Expense reasons	
Category	Mileage
Payment	
Deduction	
Tax Type	
Default rate	0

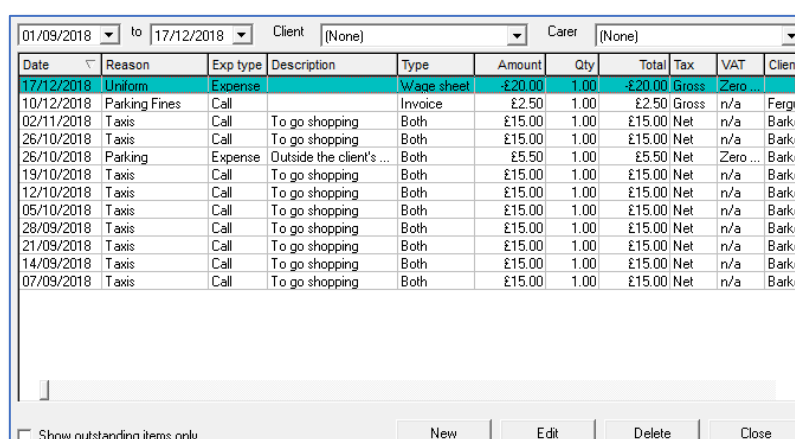
# Working with Additions & Adjustments

1. Go to **Tools**
2. Go to **Invoices & Wages**
3. Select **Additions & Adjustments** in the sub menu



The Additions and Adjustments screen will display any adjustments which have previously been created and saved. The list displayed can be filtered by specifying a date range.

The adjustments displayed in the list can be further filtered by selecting an individual Client or Carer.



The screenshot shows the 'Additions and Adjustments' screen. At the top, there are filters for 'Date' (01/09/2018 to 17/12/2018), 'Client' (None), and 'Carer' (None). A blue arrow points to the 'Carer' dropdown menu. Below the filters is a table with the following columns: Date, Reason, Exp type, Description, Type, Amount, Qty, Total, Tax, VAT, and Client. The table contains several rows of data, with the first row highlighted in green.

Date	Reason	Exp type	Description	Type	Amount	Qty	Total	Tax	VAT	Client
17/12/2018	Uniform	Expense		Wage sheet	-£20.00	1.00	-£20.00	Gross	Zero ...	
10/12/2018	Parking Fines	Call		Invoice	£2.50	1.00	£2.50	Gross	n/a	Ferg
02/11/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
26/10/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
26/10/2018	Parking	Expense	Outside the client's ...	Both	£5.50	1.00	£5.50	Net	Zero ...	Bark
19/10/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
12/10/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
05/10/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
28/09/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
21/09/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
14/09/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark
07/09/2018	Taxis	Call	To go shopping	Both	£15.00	1.00	£15.00	Net	n/a	Bark

At the bottom of the screen, there is a checkbox for 'Show outstanding items only' and buttons for 'New', 'Edit', 'Delete', and 'Close'.

4. An existing adjustment can be edited by selecting it in the list and clicking **Edit**

## Creating a New Addition & Adjustment

Click on the **New** button to add a new adjustment.

The screenshot shows a dialog box titled "£ Addition or adjustment item" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- 1** points to the **Date** field, which contains "27/02/2019" and a "Today" button.
- 2** points to the **Type** dropdown menu, which is set to "Both (charge and pay)".
- 3** points to the **Reason** dropdown menu, which is set to "Parking".
- 4** points to the **Description** text box, which contains "Outside clients home".
- 5** points to the **Amount** field, which contains "2.50".
- 6** points to the **VAT** dropdown menu, which is set to "Zero rated".
- 7** points to the **Client** dropdown menu, which is set to "Bates, Richard".

Other visible fields include **Qty** (1.00) and **Total** (2.50). At the bottom right, there are **Save** and **Cancel** buttons.

1	Specify a <b>Date</b> for the adjustment. This is the date upon which the adjustment will be itemised on an invoice/wage sheet
2	Choose to create an adjustment to either a <b>Client Invoice</b> , <b>Carer Wage sheet</b> or <b>Both</b> using the <b>Type</b> drop-down menu
3	Select the <b>Expense Reason</b> – this list be added to using the Items screen
4	Add an additional <b>Description</b> if required. This can be output on invoices/wage sheets
5	Specify the adjustment <b>Amount</b> . If creating a deduction ensure a negative value is used i.e. -30
6	Select the <b>Client</b> or <b>Carer</b> for whom the adjustment applies to
7	Click <b>Save</b> to complete

Once the adjustment has been saved, it will automatically be picked up in the next invoice/wages run.