

RoadRunner Setup Training Guide



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21/08/2019	Lyndsay Fulthorpe	RoadRunner 4.2.3 CareFree 5.5.7	V3

Introduction

This guide has been created to help customers who have recently had the Electronical Call Monitoring system, RoadRunner, installed alongside their new or existing CareFree system.

The guide will cover everything needed to set up CareFree in order to utilise RoadRunner efficiently such as:

- The importance of the rota
- Call details, needs and time critical events
- How to set and manage call alerts
- Creating call notes to be viewed via the app
- Carer/Client PINS and where to get them
- Viewing the logs send by the carers
- How to send messages out to Carers
- Explanation of the Electronic Monitoring reports

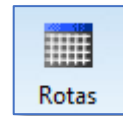
Importance of the Rota

There are multiple options within the calls on the CareFree Rota which can be utilised now you are using Electronic Call Monitoring (ECM). These options include functionality such as time critical calls, call notes and call alerts.

It is also important to check the details of the call are correct as these details will reflect onto the Carers RoadRunner rota.

Call Date & Time

1. From the CareFree main menu, click **Rotas**



2. Search for the appropriate Carer/Client and double-click a call to reveal the **Call Details** screen

A screenshot of the "Call details for Perry, Fred" window. The window has several tabs: "Call details", "Needs", "Alerts, Time Critical & Event", "Notes", "Expenses and Mileage", and "RoadRunner Notes". The "Call details" tab is active. It contains fields for "Start date" (09/01/2019), "End date" (09/01/2019), "Time" (16:30), "Type" (Weekly), "Carer" (Baldin, Clare), "Medication" (Prompt), "Medication Time" (AM), "Run" ([None]), "Contract" (Perry, Fred), "Site" ([None]), and "Override the default role" ([None]). There is also a checkbox for "Site call must be allocated". At the bottom, there is a section for "When changes are made - apply them to" with radio buttons for "This week" (07/01/2019), "Upto w/e" (20/01/2019), and "This week & beyond" (31/12/2018). The "This week & beyond" option is selected. There are "Save" and "Cancel" buttons at the bottom right.

3. The date of the call is listed in the **Start Date** and **End Date** fields

A close-up of the "Start date" and "End date" fields. The "Start date" field shows "09/01/2019" and "16:30". The "End date" field shows "09/01/2019" and "17:00".

4. The start and end time of the call is listed next to the date fields

5. Change this information appropriately by using the date drop-down boxes and time fields

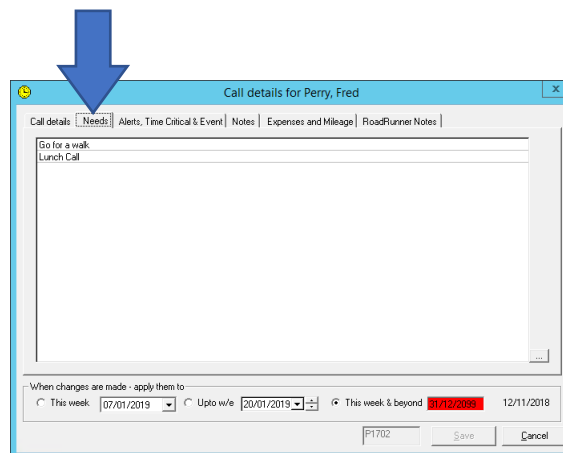
6. Click **Save**

A close-up of the "When changes are made - apply them to" section. The "This week & beyond" radio button is selected. A blue arrow points to the "Save" button.

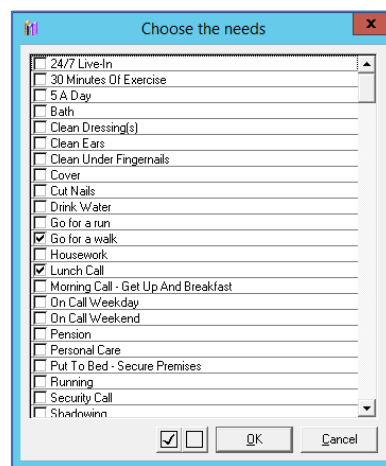
Call Needs

It is important that the **Needs** of the call are entered appropriately as they will display as the **Purpose of the Call** on the Carers RoadRunner application.

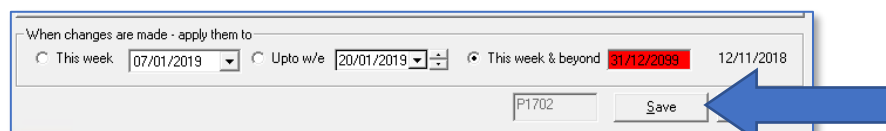
1. Open the call to reveal the **Call Details** screen as described in [page 4](#)
2. Open the **Needs** tab



3. Use the ellipsis button to the bottom right of the screen



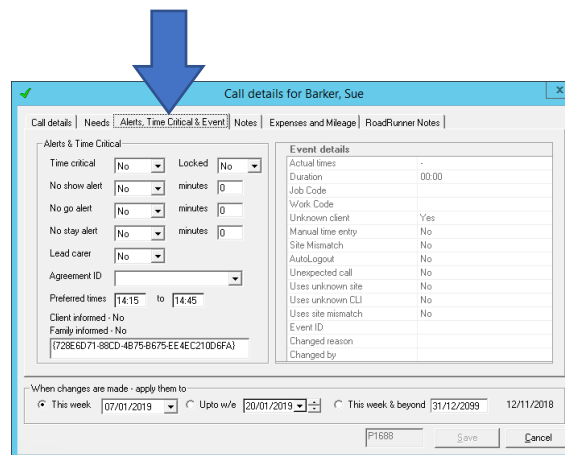
4. Tick the needs that are relevant to the call and click **OK**
5. Click **Save**



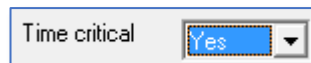
Time Critical

The Time Critical functionality can be utilised to ensure the Carer arrives to the call on time. This functionality will lock the call on the rota therefore taking away the ability to drag and drop the call.

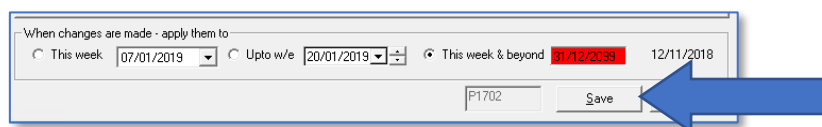
1. Open the call to reveal the **Call Details** screen as described in [page 4](#)
2. Open the **Alerts, Time Critical and Event** tab



3. Change the **Time Critical** drop-down box to **Yes** to make the call time critical



4. Click **Save**



5. The Carer will see that the call is time critical as the call will show a clock symbol on the RoadRunner rota



6. When the Carer presses on the call to view more details, they will see the following:

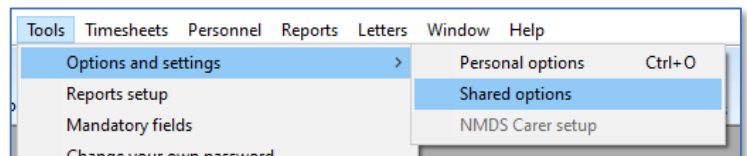


Incrementing Rotas to Carers

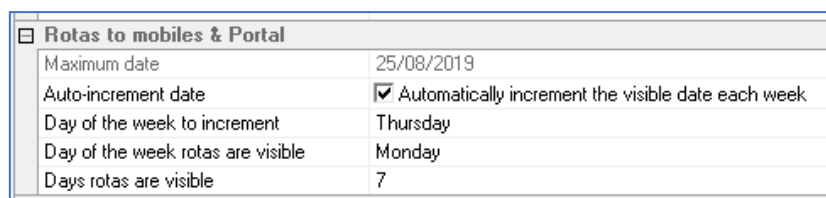
You may want to restrict how far ahead the Carers can see their rotas in advance. This is something you can set up within CareFree.

Please bear in mind, you may not have sufficient access to change these settings. If not please see your administrator.

1. Go to **Tools**
2. Go to **Options and Settings**
3. Open **Shared Options**



4. Using the navigation menu on the left, click **External Links**

A screenshot of the 'Rotas to mobiles & Portal' settings window. The window contains a table with the following settings:

Maximum date	25/08/2019
Auto-increment date	<input checked="" type="checkbox"/> Automatically increment the visible date each week
Day of the week to increment	Thursday
Day of the week rotas are visible	Monday
Days rotas are visible	7

- **Maximum Date** – can be set if you want your Carers to see their rotas up to a certain date
This option is greyed out if have the Auto-Increment Date option ticked
- **Auto-Increment Date** – if this is ticked the rotas will automatically increment for X amount of days each week
- **Day of the Week to Increment** – this is the day you want the rotas to automatically increment to the Carers
- **Day of the Week Rotas are Visible** – this is the day of the week the rotas will show from
- **Days Rotas are Visible** – this is the amount of days you want the rotas to show from the day the rotas are visible

Example

Looking at the settings in the screenshot above, these settings will automatically show 7 days-worth of the rotas from Monday. The Carers will be able to see next week's rota on Thursday.

Call Alerts

Call Alerts can be configured so that CareFree users can ensure Carers are signing in and out of calls via RoadRunner. Different alerts can be configured which are listed below in this section.

Setting Alerts on a Call

1. Open the call to reveal the **Call Details** screen as described in [page 4](#)
2. Open the **Alerts, Time Critical and Event** tab

Call details for Barker, Sue

Call details | Needs | Alerts, Time Critical & Event | Notes | Expenses and Mileage | RoadRunner Notes

Alerts & Time Critical

Time critical	No	Locked	No
No show alert	No	minutes	0
No go alert	No	minutes	0
No stay alert	No	minutes	0
Lead carer	No		
Agreement ID			
Preferred times	14:15	to	14:45
Client informed - No			
Family informed - No			
	(728E6D71-88CD-4B75-B675-EE4EC210D6FA)		

Event details

Actual times	-
Duration	00:00
Job Code	
Work Code	
Unknown client	Yes
Manual time entry	No
Site Mismatch	No
AutoLogout	No
Unexpected call	No
Uses unknown site	No
Uses unknown CLI	No
Uses site mismatch	No
Event ID	
Changed reason	
Changed by	

When changes are made - apply them to

This week 07/01/2019 Upto w/e 20/01/2019 This week & beyond 31/12/2099 12/11/2018

P1688 Save Cancel

3. Use the alert drop-down boxes to configure an alert on a call:

- **No Show Alert** will notify the CareFree user when a Carer has not signed into a call
- **No Go Alert** will notify the CareFree user when a Carer has not signed out of a call
- **No Stay Alert** will notify the CareFree user when a Carer has not stayed the entire length of the call

No show alert	No	minutes	0
No go alert	No	minutes	0
No stay alert	No	minutes	0

4. Use the **High**, **Med** or **Low** options to use pre-determined times. These pre-determined times are set up on the contract – see [page 17](#) for more information

No show alert	High	minutes	15
No go alert	Med	minutes	30
No stay alert	Low	minutes	90

5. Alternatively use the **Other** option and enter the number of minutes you wish to use for the alert

Other	minutes	10
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Call Alert Examples

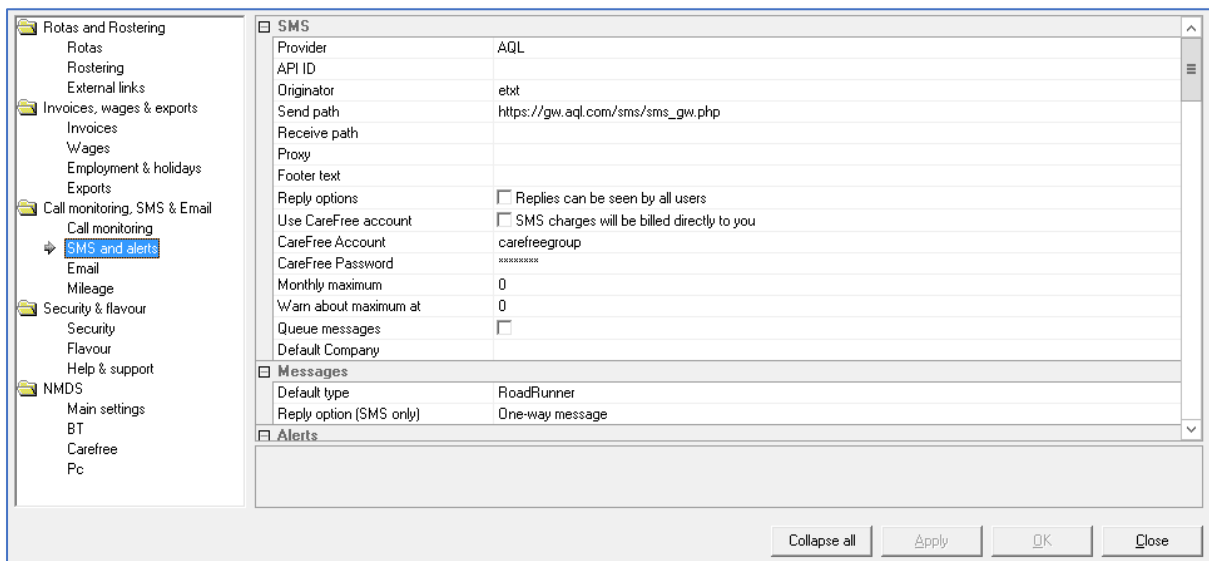
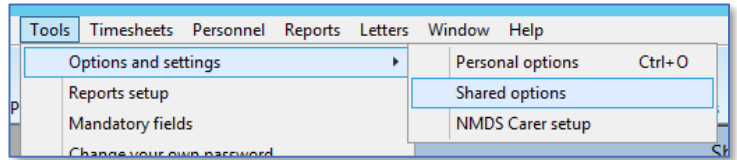
- If a 15 minute No Show Alert is set, the alert will trigger if the Carer has not signed into the call after 15 minutes of the calls start time
- If a 30 minute No Go Alert is set, the alert will trigger if the Carer has not signed out of the call after 30 minutes of the calls end time
- If a 10 minute No Stay Alert is set, the alert will trigger if the Carer has signed out of the call more than 10 minutes prior to the calls end time

Ensure you have Raise Real-Time Alerts set in the shared options – see [page 10](#) for more information on how to enable this setting

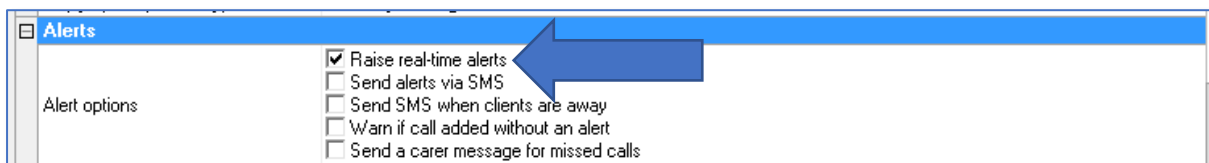
Setting Out of Hours Alerts

Out of Hours Alerts can be set to send a No Show, No Go or No Stay alert via email or SMS.

1. Go to **Tools**
2. Go to **Options & Settings**
3. Click **Shared Options**
4. Using the left of the screen, click **SMS and Alerts**



5. Scroll down to the **Alerts** section and make sure **Raise Real-Time Alerts** is ticked



The Raise Real-Time Alerts setting does need to be enabled for any kind of alert, be it in or outside of CareFree

6. Scroll down further to the **Alert Time Zones** section
Up to 5 different time zones can be set using this section

1	Enter the Time Range for the alerts to show here (24hr clock)
2	Tick the Days you wish to raise the alerts on here
3	Enter either a Mobile Number or Email Address to where the alerts will be sent to here
4	Enter the Company and/or Branch if you only wish to raise alerts for a specific company and/or branch
5	Click OK to save

7. Use Zones 2-5 further down to enter more time zones for alerts.
For example, the setup below will send an email the specified email Monday-Sunday between the hours of 6:01pm and 7:59am

8. Click **OK** to save

Viewing Call Alerts

Call alerts will pop up on the CareFree user's screen and will look something like the screen below:

Alert

The following calls have raised alerts

Date	Times	Dura...	Carer	Client	Need	Type	Raised
<input checked="" type="checkbox"/> Mon 07/01	07:00-09:30	02:30		Ovett, Steve	Housework, Mo...	No Show	07/01/2019 07:16:18
<input type="checkbox"/> Mon 07/01	07:30-08:00	00:30		Ovett, Steve	Bath, Morning C...	No Show	07/01/2019 07:46:20
<input type="checkbox"/> Mon 07/01	07:30-08:00	00:30		Ovett, Steve	Bath, Morning C...	No Show	07/01/2019 07:46:20
<input type="checkbox"/> Mon 07/01	08:00-09:00	01:00		Chuckle, Barry	Morning Call - G...	No Show	07/01/2019 08:16:21
<input type="checkbox"/> Mon 07/01	09:00-09:30	00:30	Baldin, Claire	Perry, Fred	Morning Call - G...	No Show	07/01/2019 09:16:25
<input type="checkbox"/> Mon 07/01	10:15-10:45	00:30	Baldin, Claire	Barker, Sue	Drink Water, M...	No Show	07/01/2019 10:31:30
<input type="checkbox"/> Mon 07/01	14:15-14:45	00:30	Baldin, Claire	Barker, Sue	Drink Water, Lu...	No Show	07/01/2019 14:31:47
<input type="checkbox"/> Mon 07/01	16:00-18:00	02:00		Ovett, Steve	Personal Care, ...	No Show	07/01/2019 16:16:54

Call details:

Date: 07/01/2019 Time critical: No
 Times: 07:00 - 09:30 Duration: 02:30
 Client: Ovett, Steve Telephone:
 Carer: Telephone:
 Need: Housework, Morning Call - Get Up And Breakfast, Personal Car
 Last at: Home

Alert details:

Raised: No Show 07/01/2019 07:16:18
 Responded:
 Computer:
 Escalated:
 Escalated to:
 Details:
 Actual times: 07:00 to 08:00

Ticking alerts means you've seen the alerts and have responded to them

Save Ignore Close

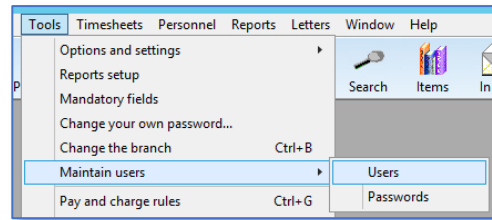
1	All the calls where an alert has been raised are listed here
2	The Call Details such as the date and time of the call as well as the Client and Carer allocated to the call are listed here
3	The Alert Details are listed here – which will show what alert has been raised
4	Use the Actual times fields to enter in actual times if the Carer has forgotten to sign into the call
5	Click Save to save any changes you have made, or click Ignore/Close to respond to the alerts at a later time

Alerts can also be actioned from the Current Activity screen – see [page 20](#) for more information

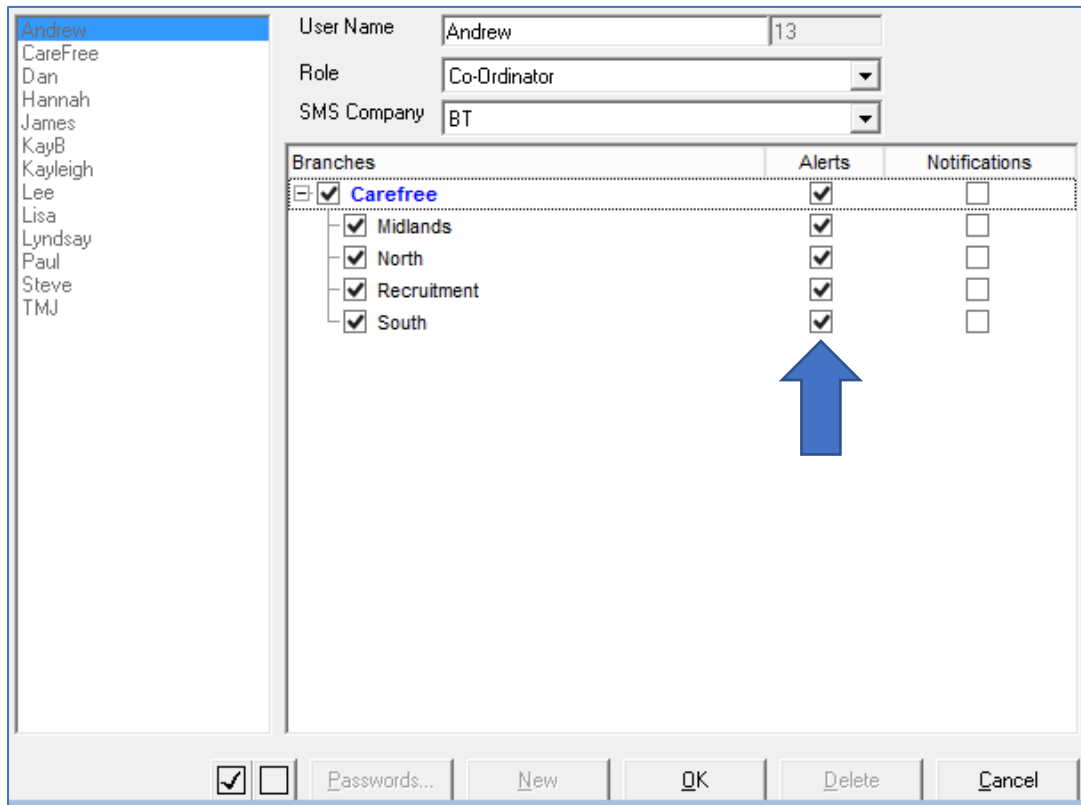
Who Can View Call Alerts?

Call Alerts can only be viewed by the users who are set up to receive alerts.

1. From the CareFree main menu, go to **Tools**
2. Go to **Maintain Users**
3. Click **Users**



4. Click the user who requires to receive alerts
5. Click **Edit**
6. Tick the **Alerts** tick boxes next to each relevant company/branch

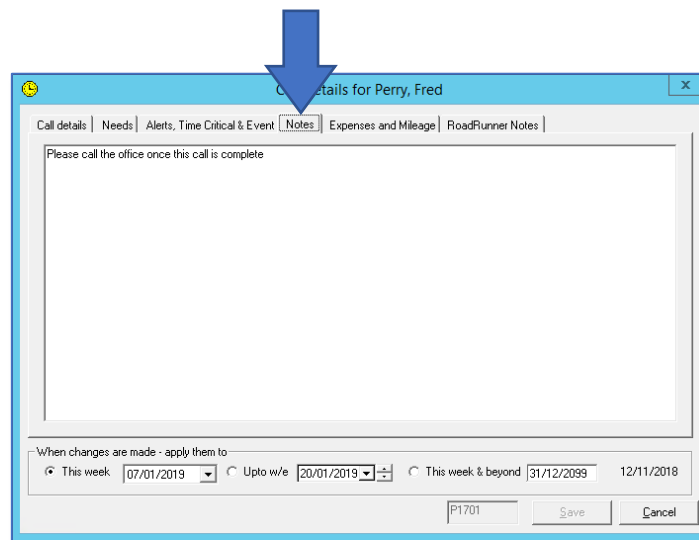



7. Click **OK** to save

Call Notes

Call notes can be entered onto the call for the Carer to view via the RoadRunner application.

1. Open the call to reveal the **Call Details** screen as described in [page 4](#)
2. Open the **Notes** tab



3. Once in the notes tab simply type in the comments you wish the Carer to see as shown in the screen above
4. The Carer will see that the call has notes attached as the call will show a notepad symbol on the RoadRunner rota 
5. When the Carer presses on the call to view more details, they will see the following:

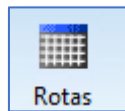
Notes: Please call the office once this call is complete

RoadRunner Notes

When signing out of a call the Carer must enter a call note. The RoadRunner application will prompt them to do so if they have not entered a call note when signing out.

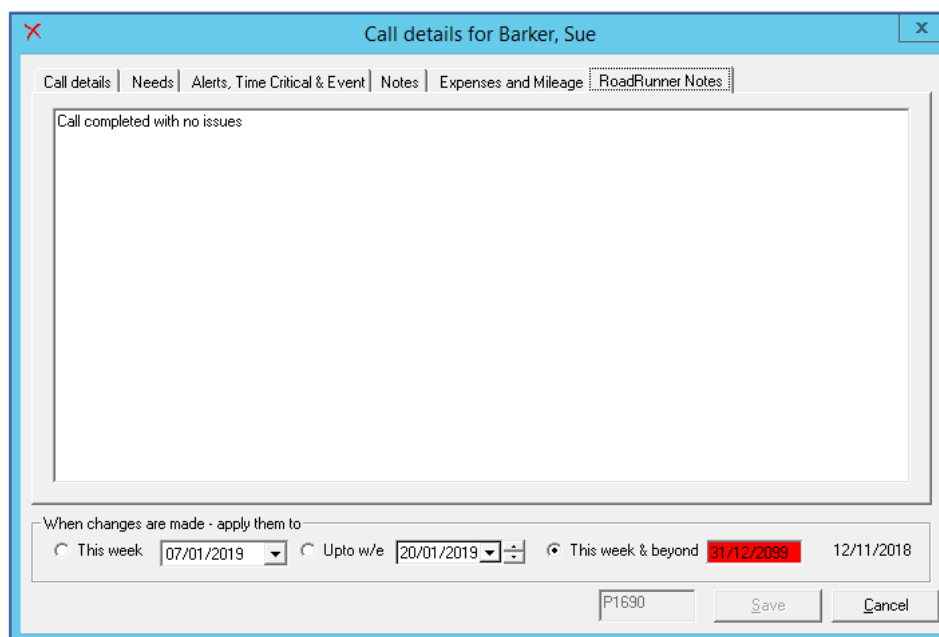
Call notes can be viewed from the call in CareFree.

1. From the CareFree main menu, open the **Rota**



2. Open a call that a Carer has signed in and out of using RoadRunner
3. Open the **RoadRunner Notes** tab

Call notes from the Carer will displayed in this tab.



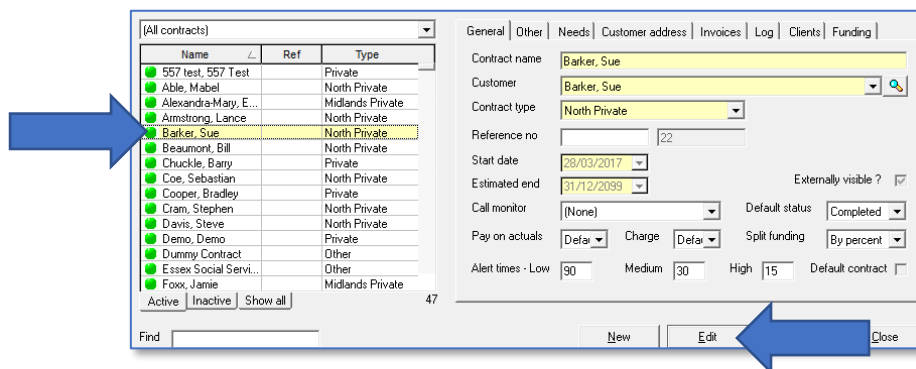
Contracts

There are steps within the Contracts screen which are important to configure now you are using RoadRunner or another Electronic Call Monitoring (ECM) system.

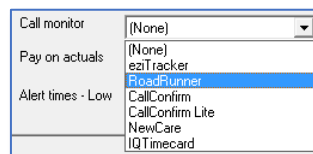
Setting up Call Monitoring on Contracts

Call monitoring must be set up on all of the relevant contracts using ECM. This will ensure the calls are displayed appropriately in the Verification screen.

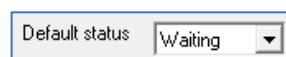
1. From the CareFree main menu, click **Contracts**
2. Find the Contract where ECM needs to be applied using the list to the left
3. Click **Edit**



4. Change the **Call Monitor** drop-down box to the relevant call monitoring application



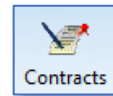
5. By applying call monitoring to a contract, the **Default Status** drop-down box will change to **Waiting** – this will change the status of all future calls linked to this contract to waiting.



6. Click **OK** to save the contract
7. Repeat these steps for all the contracts where ECM needs to be applied

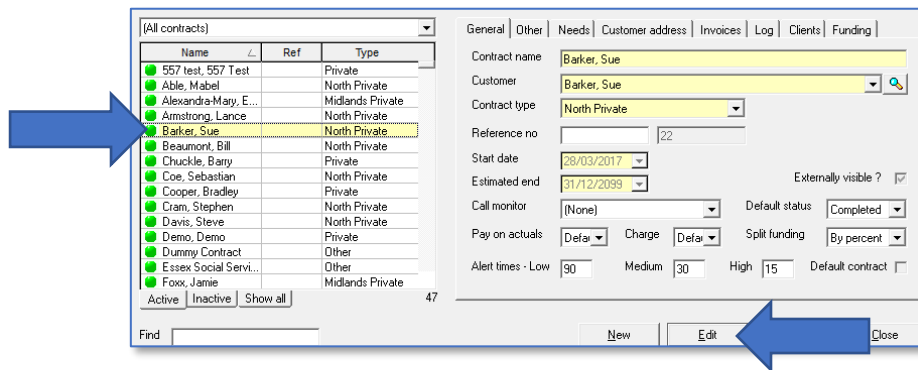
Setting Pre-determined Alert Times on a Contract

1. From the CareFree main menu, click **Contracts**



2. Find the Contract where alert times needs to be applied using the list to the left

3. Click **Edit**



4. Using the **Low**, **Medium** or **High** fields, enter the appropriate number of minutes for each setting

Alert times - Low Medium High

5. Click **OK** to save

6. Repeat these steps for all the contracts where the alerts times need to be applied

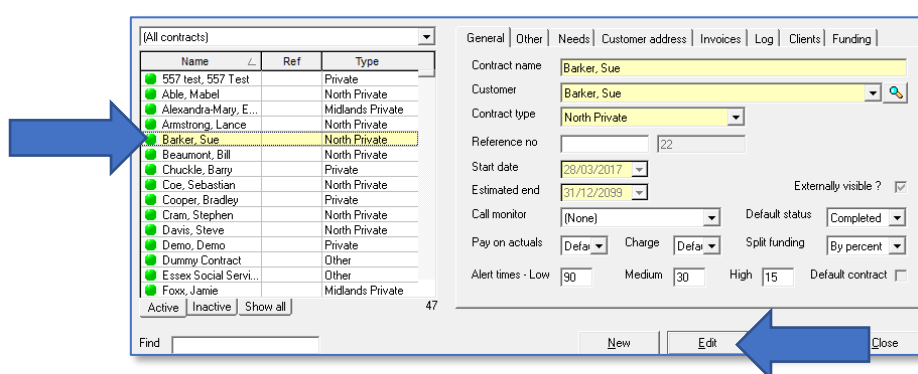
When setting call alerts these pre-determined number of minutes will be entered when choosing either **Low**, **Med** or **High** for the alert (see [page 8](#) for how to set call alerts)

No show alert	Low	minutes	90
No go alert	Med	minutes	30
No stay alert	High	minutes	15

Paying and/or Charging on Actual Times

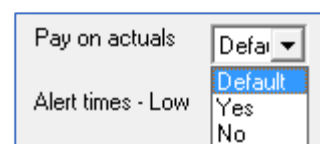
Now the Carers are signing in and out calls, the actual time of the call's duration is populated in CareFree. You may wish to pay your Carers on the actual duration they have stayed at a call and/or charge your customers on the actual duration of the call.

1. From the CareFree main menu, click **Contracts**
2. Find the Contract where paying and/or charging on actuals needs to be applied
3. Click **Edit**



4. Change the **Pay on Actuals** and/or **Charge** drop-down boxes to either of the following:

- **Default** – pays/charges on planned times
- **Yes** – pays/charges on actual times
- **No** – pays/charges on planned times



5. To start paying and/or charging on actual times change the drop-down boxes on the **Pay on Actuals** and **Charge** to **Yes**



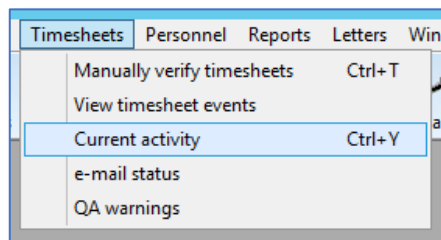
A contract does not require both the pay and charge drop-down boxes to be set with the same setting. For example, you may want to pay the Carers on actual times but charge customers on planned times

6. Click **OK** to save
7. Repeat these steps for all the contracts where pay/charge on actuals needs to be applied

Current Activity Screen

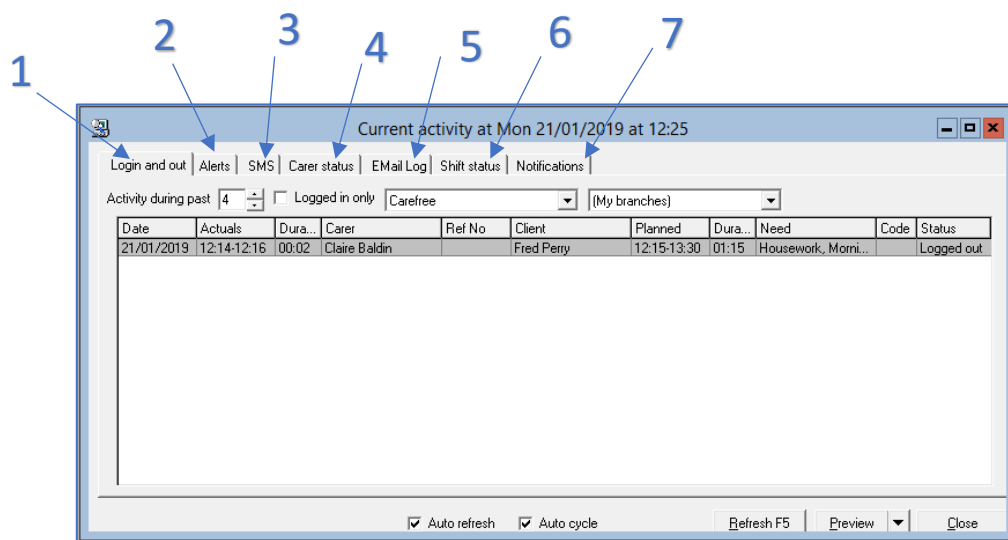
The current activity screen can be used to monitor what is happening out on the field. This is also where you would go to pick up requests that come through from RoadRunner.

1. From the CareFree main menu, go to **Timesheets**



2. Click **Current Activity**

3. The current activity screen consists of numerous tabs

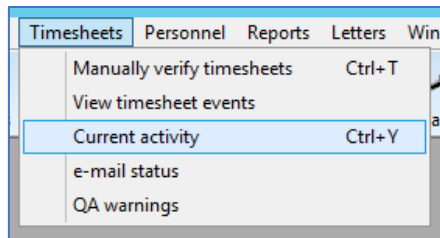


1	The Login and Out tab will show a recent update of each Carers sign in and out transactions
2	The Alerts tab will show all the of raised alerts that have not yet been actioned and where actual times can be entered on to a call
3	The SMS tab will show any SMS messages that have been sent, which Carer received the message and if it has been replied to
4	The Carer Status tab will show the current activity of the Carer i.e. if they're away or have recently logged out
5	The Email Log tab will show will show any emails that have been sent
6	The Shift Status tab will show the alert start times for a Run
7	The Notifications tab will show any requests which have come through via RoadRunner i.e. request for leave, task management notes, request to cover unallocated calls

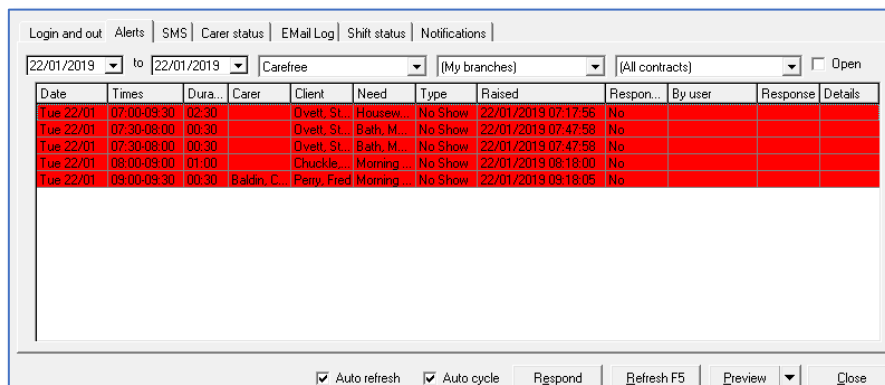
Alerts Tab

All unactioned alerts are listed in the **Alerts** tab in the **Current Activity** screen.

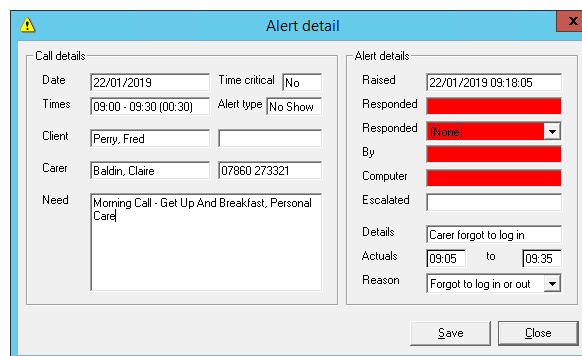
1. From the CareFree main menu, go to **Timesheets**
2. Click **Current Activity**



3. Click the **Alerts** tab



4. Double-click an alert to action



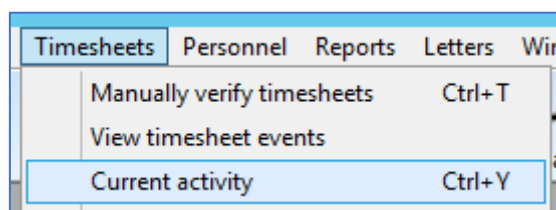
5. The details of the alert are listed to the left of the screen
6. Fill in the **Details**, **Actuals** and **Reason** drop-down box and click **Save**
7. Click **Respond** on the alerts tab screen to clear the alert



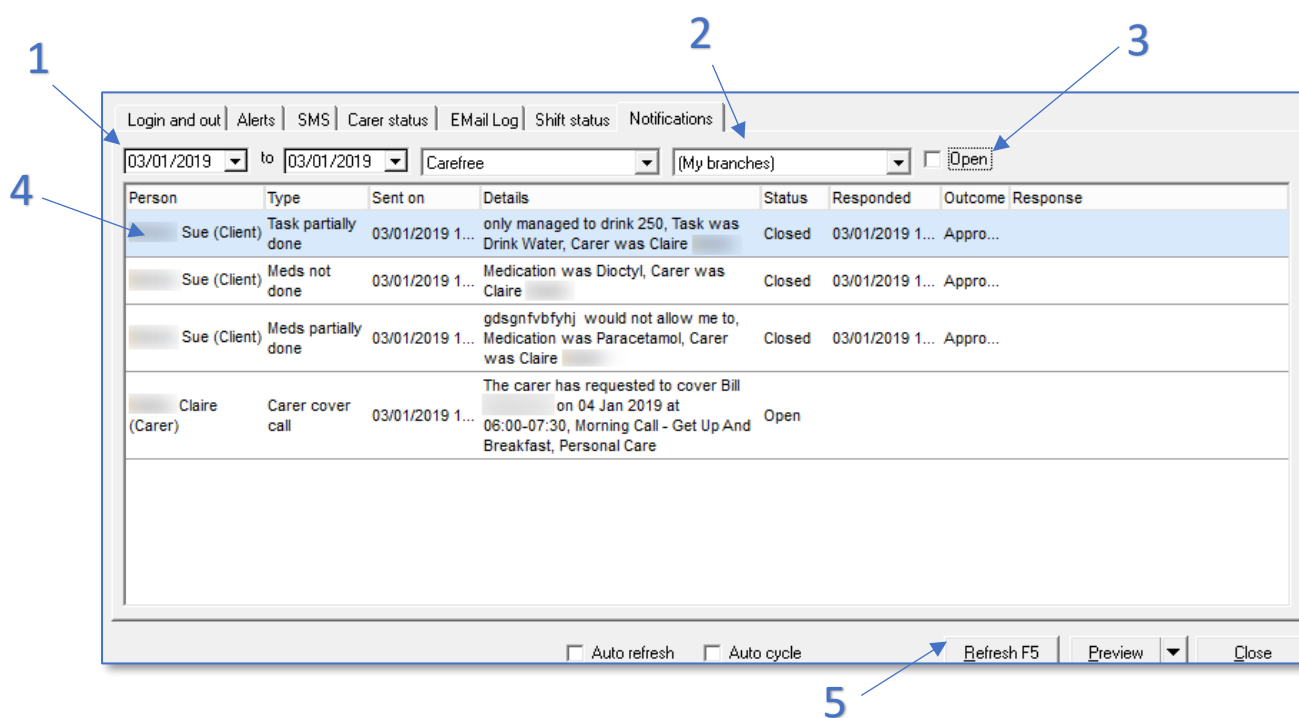
CareFree Notifications

Requests can be sent from certain areas of the RoadRunner system to CareFree. These requests will appear as Notifications in CareFree.

1. From the CareFree main menu, click **Timesheets**
2. Click **Current Activity**

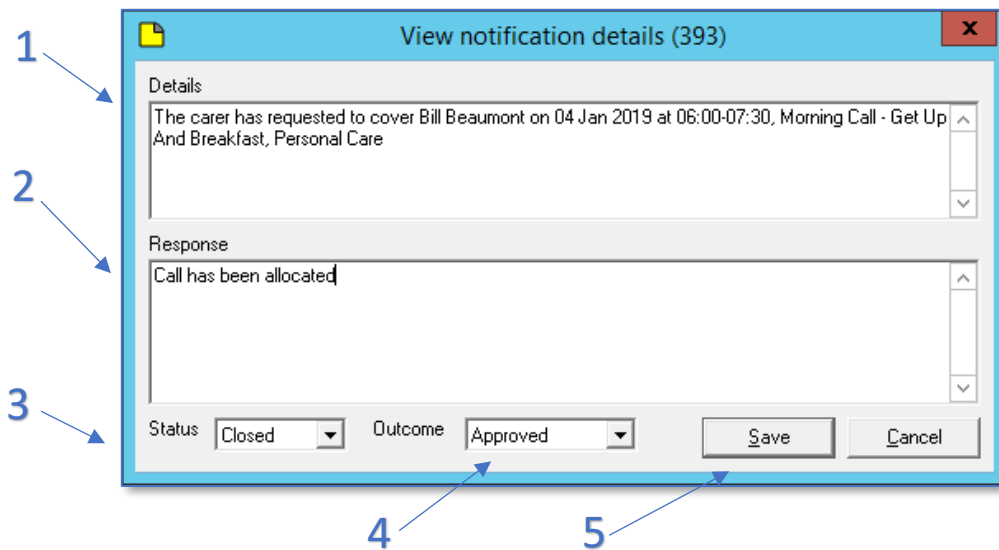


3. When the **Current Activity** screen appears, click the **Notifications** tab



1	Use the Date drop-down boxes to view notifications within a specific date range
2	Use the Branch drop-down box to view notifications within a certain branch
3	Tick Open to view notifications with an Open status
4	Double-click a notification to view the full details as well as entering a status and an outcome (see page 22)
5	Click Refresh if any filters have been used

To respond to a notification, double-click on a notification to update any relevant details



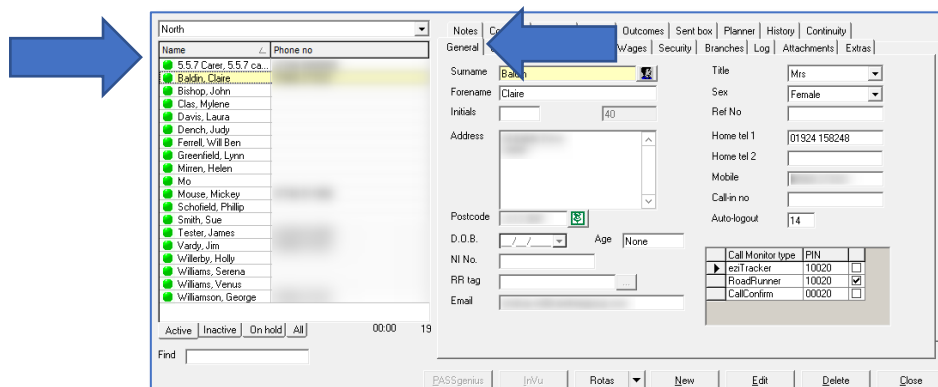
1	Details of the notification are displayed in the Details field
2	Enter your response to the notification in the Response field
3	Change the Status of the notification to Open, Read or Closed
4	Change the Outcome of the notification to Approved, Declined or Pending
5	Click Save to save any changes

Please note you will still need to manually action the notification. For example, if the notification was a request to cover a Clients call, you have to manually allocate the call to the Carer on the CareFree rota. Updating the notification will not do this for you

Credentials to Log into RoadRunner

It is important to know where the Carers RoadRunner login credentials are stored within CareFree.

1. From the CareFree main menu, click **Carers**
2. Find the Carer using the list to the left
3. Make sure you have the **General** tab open



4. The Carers RoadRunner username is the data entered within the **Forename** field

A close-up of the 'Forename' field in the software interface, showing the text 'Claire'.

5. To the bottom right of the screen, ensure the appropriate call monitoring option is ticked. The Carers RoadRunner password is the **PIN** number next to the appropriate call monitoring application

Call Monitor type	PIN	
eziTracker	10020	<input type="checkbox"/>
RoadRunner	10020	<input checked="" type="checkbox"/>
CallConfirm	00020	<input type="checkbox"/>

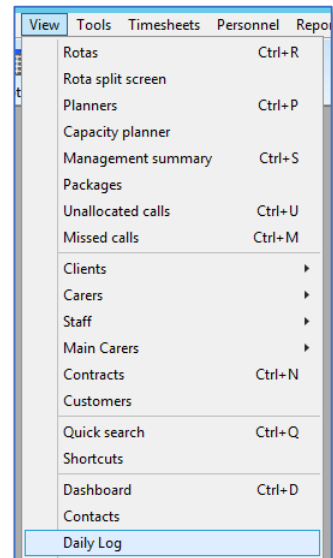
In the example above, the Carers username is **Claire** and their password is **10020**.

A report called **People and PINs** can be generated to display all the Carers RoadRunner credentials – go to [page 29](#) for more information.

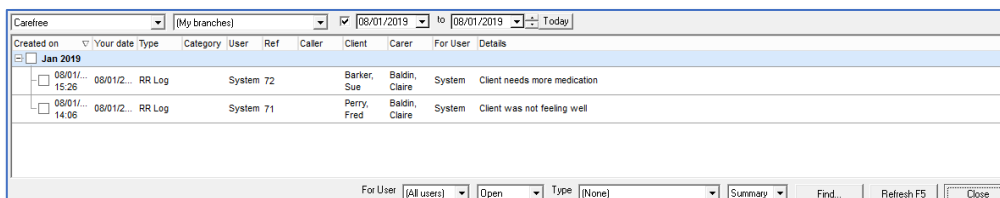
Daily Logs

Carers have the ability to send logs during their call. A company option can be switched on, where the Carer is asked to complete a call log when signing out of a call (see the Transaction Portal training guide for more information).

1. From the CareFree main menu, go to **View**
2. Click **Daily Log**



3. Any logs that the Carers have entered from RoadRunner will come through with the log type **RR Log**



4. Double-click a log to reveal the full details of the log as well as having the opportunity to enter an **Outcome** and **Lessons Learned**



5. Click **OK** to save

The logs will also be stored in the Carer/Client records in the Log tab

RoadRunner Messages

Messages can be sent from CareFree to the Carers RoadRunner application. Carers can reply to and send new messages to CareFree users.

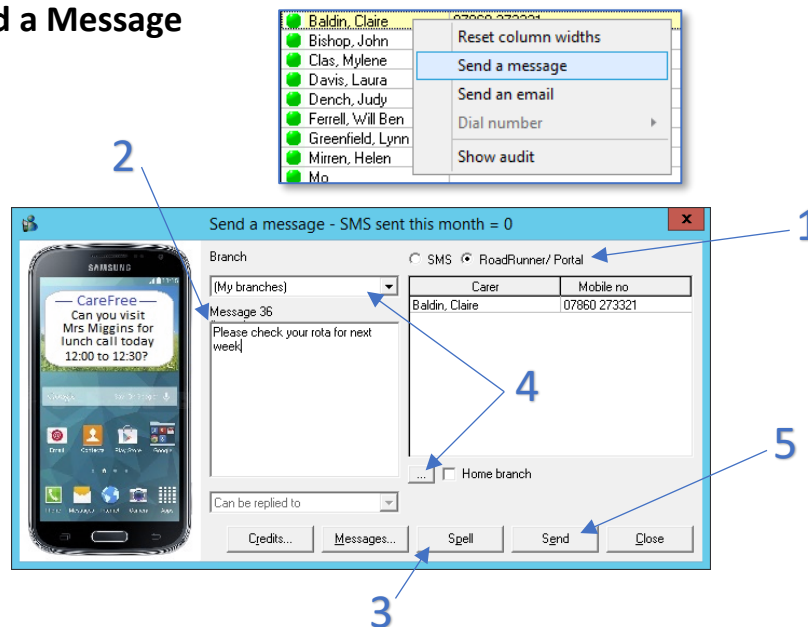
Sending Messages

1. From the CareFree main menu, click **Carers**
2. Using the list to the left, to find the appropriate Carer
3. Right-click the Carers name



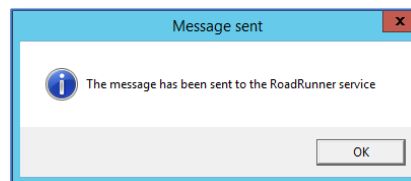
You can also right-click the Carers name from the Rota screen

4. Click **Send a Message**



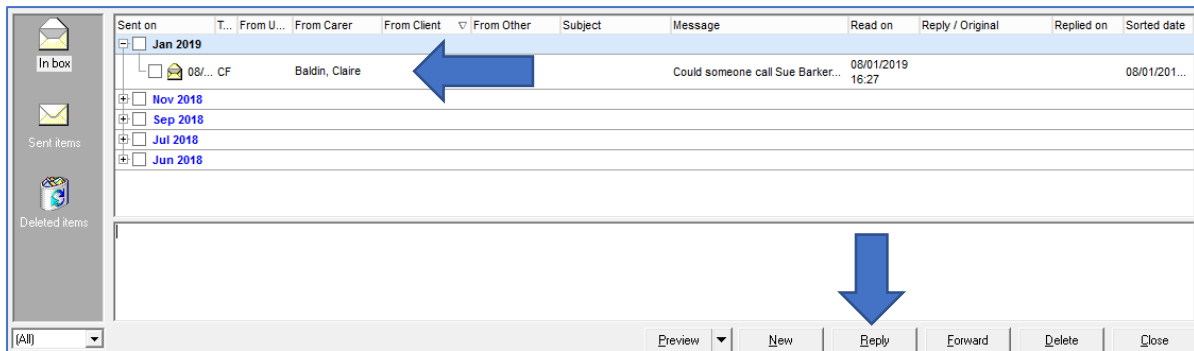
1	Make sure the radio button is set to RoadRunner / Portal
2	Enter the message you want to send to the Carer in the Message field
3	Use the Spell button to use spell checker on your typed message
4	Use the ellipsis button to choose to send the same message to multiple Carers – use the Branch drop-down box to multi select Carers within a particular branch
5	Press Send to send the message

When pressing **Send** the following prompt will appear. Press **OK**.



Receiving Messages

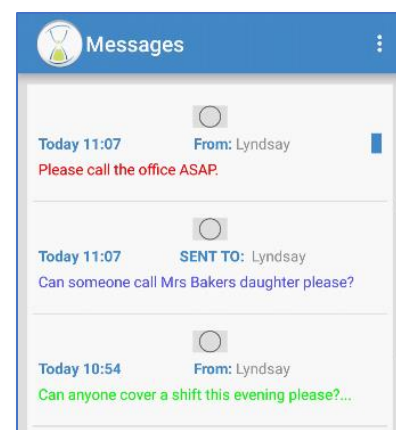
1. From the CareFree main menu, press **Inbox**
2. Messages will be grouped by the month they were received
3. Double-click a message to view the message in full
4. Click **Reply** to send a message back to the Carer



Messages that are sent to the Carers can be viewed from the **Messages** screen in the RoadRunner application.

A list of the Carers messages will be displayed within this screen:

- Unread messages have a blue block to the right of them
- Red messages are messages that **have not** been replied to
- Green messages are messages that **have** been replied to
- Blue messages are messages that the Carer have sent



Medication Setup

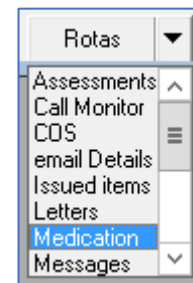
Task Management can be completed by the Carer while on a call using the RoadRunner application. This will allow the Carer to say what Tasks and Medication have been completed, not completed or partially completed.

In order for the Carer to view the correct medication for the Client, each Client's medication must be entered into CareFree along with a specific time of when it should be taken.

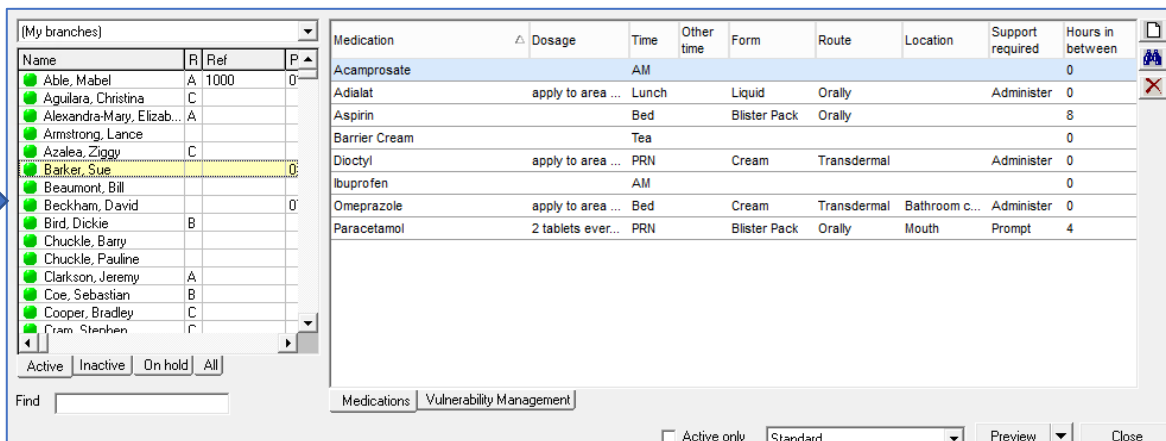
1. From the CareFree main menu, go to **Clients**




2. Using the Rota drop-down menu, go to **Medication**



3. A list of Clients will appear to the left, choose to the Client whose medication needs to be entered



4. Click the  button at the top right of the screen to add a new medication

To enter multiple tasks for the Carer to complete using Task Management you must amend the Needs of the call – see [page 5](#)

The screenshot shows a 'Medication Item' form with the following fields and values:

- 1: Medication: Amoxicillin
- 2: Time: AM
- 3: Form: Blister Pack
- 4: Location: Medication cupboard in kitchen
- 5: Hours in between: 8
- 6: Notes: 500mg every 8hours
- 7: Dosage: 2 x 250mg tablets
- 8: Route: Orally
- 9: Support Required: Prompt
- 10: Start date: 21/01/2019, End date: 31/12/2099

1	Enter the Medication name
2	Enter the Time the medication should be taken. This will link with the Medication Time drop-down box on the call (see below)
3	Enter the Form in which the medication comes in
4	Enter the Location of where the medication is stored
5	Enter how many hours in between taking the medication in the Hours in between field
6	Enter any Notes required for the medication
7	Enter the Dosage of the medication
8	Enter how the medication should be used/taken in the Route field
9	If there is any support needed from the Carer, enter this in the Support Required field
10	Enter how long the Client will be taking the medication for in the Start Date and End Date fields. If the Client will be taking the medication indefinitely leave the end date as 31/12/2099

5. Click **Save** to save the medication on the Clients record

On each of the Clients calls there will be a **Medication Time** drop-down box. When a time is selected all of the Clients medication with that specified time will appear on the RoadRunner Task Management screen for the Carer to complete.

The screenshot shows the 'Call details for Barker, Sue' form. A blue arrow points to the 'Medication Time' dropdown menu, which is currently set to 'AM'. Other fields include:

- Time Critical & Event: 10:15, Type: Weekly
- Carer: Baldwin, Claire
- Medication: (None)
- Run: (None)
- Contract: Barker, Sue
- Site: (None)
- Site call must be allocated:
- Override the default role: (None)
- Upto w/e: 03/02/2019, This week & beyond: 31/12/2099, 12/11/2018

Reports

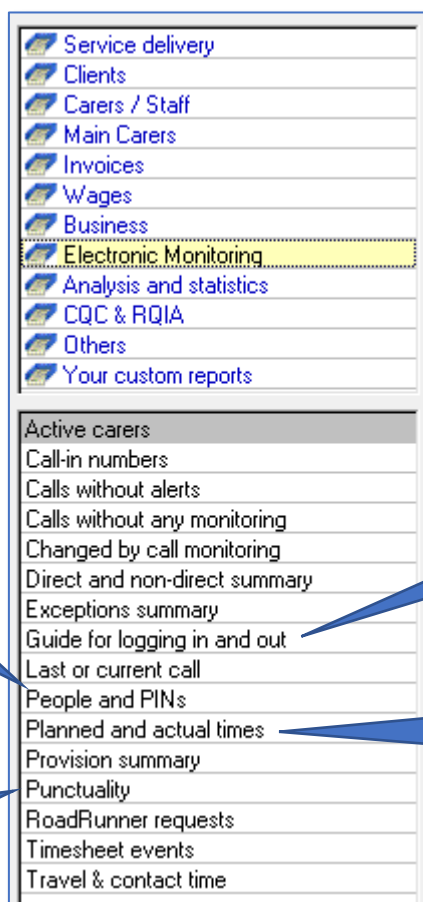
There are many reports you can run from the CareFree system, including some reports which provide useful when beginning to use a call monitoring system.

To access the reports click **Reports** from the CareFree main menu.



Each report is listed under a category, the category required for call monitoring reports is under **Electronic Monitoring**.

Here are some reports which have proved popular amongst CareFree customers along with an explanation of what the report will show.



People and PINS – List of every Client and Carer and the unique PIN associated with them

Guide for Logging In and Out – A personal guide on how to use the telephone for logging in and out electronically. Specifically designed for EziTracker

Punctuality – List of all calls where the Carer was late by a range of minutes

Planned and Actual Times – Simple comparison report by Client, Carer or date showing the planned against the actual times