

RoadRunner Setup Training Guide



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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

Rotas



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

Start date	09/01/2019 💌	16:30
End date	09/01/2019 💌	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

- When changes are made - apply them to	© This week & beyond 31/12/2055 12/11/2018	
	P1702 Save	

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

Call detail	s for Barker. Sue	x
Cali detais Needs Alerts, Time Citical & Event Note Ex Alorts & Time Citical Time critical No • Locked No • No ahow aler No • minutes 0 No go alert No • minutes 0 No atay alert No • minutes 0 Lead care No • Preferred times T415 to 14.45 Citer i r/ormed - No Frank i r/ormed - No [725/E6071-82CD-4875/8675/E44/2100/EFA]	Perses and Mileage RoadRu Event details Actual times Duration Job Code Unknown client Unknown client Unknown client Unknown client Unknown client Unknown client Unknown client Unes unknown clie Unes unknown c	revet Notes
	019 O This week &	beyond 31/12/2099 12/11/2018 Save Cancel

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

Tool	Timesheets	Personnel	Reports	Letters	Window Help	
	Options and se	ttings		>	Personal options	Ctrl+0
	Reports setup				Shared options	
	Mandatory fiel	ds			NMDS Carer setup	-
	Change your o	wn naceword				

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

Rotas to mobiles & Portal			
Maximum date	25/08/2019		
Auto-increment date	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 Aletts, Time Critical & Event. Notes Expenses and Mileage RoadRunner Notes					
Alerts & Lime Critical	Event details				
Time critical No 👻 Locked No 👻	Actual times	-			
No show shat	Duration	00:00			
No show alert No rinutes 0	Job Code				
Nogoalert No 🗸 minutes 🕥	Work Code				
	Unknown client	Yes			
Nostayalert No 🗸 minutes 0	Manual time entry	No			
lead carer	Site Mismatch	No			
	AutoLogout	No			
Agreement ID	Unexpected call	No			
	Uses unknown site	No			
Preferred times 14:15 to 14:45	Uses unknown CLI	No			
Client informed - No	Uses site mismatch	No			
Family informed - No	Event ID				
{728E6D71-88CD-4B75-B675-EE4EC210D6FA}	Changed reason				
	Changed by				
When changes are made - apply them to	When changes are made - apply them to				
	019 ▼ ÷ C This week &	beyond 31/12/2099 12/11/20	18		
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

 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
-------------------	----

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 <u>page 10</u> 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

Тоо	s Timesheets	Personnel	Reports	Letters	Wi	ndow Help	
	Options and set	tings		•		Personal options	Ctrl+O
Reports setup				Shared options			
Mandatory fields					NMDS Carer setup		
	Change your ou	vn naceword				,	۲۶

4. Using the left of the screen, click SMS and Alerts

		CHC		
Hotas and Hostering	E	5M5		(Δ)
Rotas		Provider	AQL	
Rostering		APLID		=
External links		Originator	etxt	
Invoices, wages & exports		Send path	https://gw.aql.com/sms/sms_gw.php	
Invoices		Receive path		
Wages		Proxy		
Employment & holidays		Footer text		1
Exports		Reply options	Beplies can be seen by all users	11
Call monitoring, SMS & Email		Use CareFree account	SMS charges will be billed directly to you	
Call monitoring		CareFree Account		
SMS and alerts		CareFree Password		
Email		Monthly maying m	0	
Mileage		Wonthly maximum	0	1 I.
Security & flavour		warn about maximum at		
Security		Queue messages		
Flavour		Default Company		
Help & support		Messages		4.1
NMDS		Default type	RoadRunner	
Main settings		Reply option (SMS only)	One-way message	
BT	E	Alerts		\sim
Carefree				
Pc				
			Collapse all Apply OK Close	
	_			

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

Alerts	
Alert options	 ✓ Raise real-time alerts Send alerts via SMS Send SMS when clients are away ✓ Warn if call added without an alert Send a carer message for missed calls

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

		Alert time zenee					
	4	Alert time zones				^	
	1		00.00 10.00				
	_	Times	08:00-18:00				
~	2	Days	✓ Monday ✓ Tuesday ✓ Wednesday ✓ Thursday ✓ Friday ✓ Saturday ✓ Sunday				
3		Mobile No	07860273321				
-		Email address	training@carefreegroup.com			=	
		Alert Company	Carefree				
		Alert Branch	North				
	Δ	🗆 Zone 2					
	-	Times	18:01-07:59				
		Days	 ✓ Monday ✓ Tuesday ✓ Wednesday ✓ Thursday ✓ Friday ✓ Saturday 			ž	5
		Alert time zones					
				Collapse all	Apply	<u>O</u> K <u>C</u> ancel	

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

 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

Zone 2			
Times	18:01-07:59		
Days	 Monday Tuesday Wednesday Thursday Friday Saturday Sunday 		
Mobile No			
Email address	outofhours@carefreegroup.com		
Alert Company	Carefree		
Alert Branch			

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			
<u>.</u>	The fol	lowing calls have	raised ale	erts	<u> </u>
Date Tim	mes Dura Carer	Client	Need	Туре	Raised
🗹 Mon 07/01 🛛 07:0	:00-09:30 02:30	Ovett, Steve	lousework, Mo	No Show 🛛 🛛	07/01/2019 07:16:18
Mon 07/01 07:3	30-08:00 00:30	Ovett, Steve E	Bath, Morning C	No Show I	07/01/2019 07:46:20
Mon 07/01 07:3	30-08:00 00:30	Ovett, Steve E	Bath, Morning C	No Show I	07/01/2019 07:46:20
Mon 07/01 08:0	:00-09:00 01:00	Chuckle, Barry M	forning Call - G	No Show I	07/01/2019 08:16:21
Mon 07/01 09:0	:00-09:30 00:30 Baldin	i, Claire Perry, Fred N	forning Call - G	No Show I	07/01/2019 09:16:25
Mon 07/01 10:1	15-10:45 00:30 Baldin	i, Claire Barker, Sue D	Drink Water, M	No Show I	07/01/2019 10:31:30
Mon 07/01 14:1	:15-14:45 00:30 Baldin	i, Claire Barker, Sue D	Drink Water, Lu	No Show I	07/01/2019 14:31:47
Mon 07/01 16:0	:00-18:00 02:00	Ovett, Steve F	Personal Care,	No Show 🛛 🛛	07/01/2019 16:16:54
 Call details			Alert details		
Date 07/01/2	'2019 Tim	e critical No	Raised	No Show	07/01/2019 07:16:18
Times 07:00 - 0	09:30 Dur	ation 02:30	Responded		
Client Ovett S	Steve Tek	ephone	Computer		
Carer	Tel	ephone	Escalated		
Need Housew	work, Morning Call - Get Ur	And Breakfast, Personal Car	Escalated to		
	,		Details		
Last at Home			Actual times	07:00 to	08:00
Ticking ale	lerts means you've seen th	e alerts and have responded to the	m <u>S</u> ave	lgno	re <u>C</u> lose

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

[Tool	s	Timesheets	Personnel	Reports	Letters	Window	Help	
		Options and settings						641	
		Reports setup					Search	Itoma	
		Mandatory fields					Search	items	in
		Change your own password							
		С	hange the bra	nch	C	trl+B			
		Ν	laintain users			۰.	Users		
		Pay and charge rules			C	trl+G	Passw	ords	

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

Andrew	User Name	Andrew		13	
Dan	Role	Co-Ordinator		•	
Hannah James Kaup	SMS Company	BT		•	
Kayleigh	Branches			Alerts	Notifications
Lee	Carefree)		 ✓ 	
Lisa Lundsau	- 🗹 Midland	ds		✓	
Paul	- Vorth			✓	
Steve TMJ	- 🗸 Recrui	tment		~	
	└ ✔ South				
]				
	Passwords	New	<u>о</u> к	<u>D</u> elete	<u>C</u> ancel

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

	×
Or etails for Perry, Fred	
Call details Needs Alerts, Time Critical & Event Notes Expenses and Mileage RoadRunner Notes	1
Please call the office once this call is complete	
- When changes are made - apply them to This week to 77/01/2019 C Upto w/e 20/01/2019 This week to beyond 31/12/2099 12	2/11/2018

- 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:



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.

× Call details for Barker, Sue		x
Call details Needs Alerts, Time Critical & Event Notes Expenses and Mileage RoadRunner Notes		
Call completed with no issues		
C This week 07/01/2019 🗨 C Upto w/e 20/01/2019 🛨 . This week & beyond 📑	/12/2099	12/11/2018
P1690	<u>S</u> ave	<u>C</u> ancel

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

	(All contracts)	•	General Other	Needs Customer address Invoices Log Clients Funding
	Name 🛆 Ref	Туре	Contract name	Barker Sue
	ڬ 557 test, 557 Test	Private		Danker, ode
	ڬ Able, Mabel	North Private	Customer	Barker, Sue
	🗎 Alexandra-Mary, E	Midlands Private	Contract tune	North Director
	🖌 🗎 Armstrong, Lance	North Private	Contract ()po	North Private
	Barker, Sue	North Private	Reference no	22
/	🖉 ڬ Beaumont, Bill	North Private		
	🛑 Chuckle, Barry	Private	Start date	28/03/2017 💌
	🛑 Coe, Sebastian	North Private	Estimated end	Externally visible
	Cooper, Bradley	Private	E stimated end	31/12/2033
	🛑 Cram, Stephen	North Private	Call monitor	(None) Complete
	🛑 Davis, Steve	North Private		
	🛑 Demo, Demo	Private	Pay on actuals	Defar 🗸 Charge Defar 🗸 Split funding Bypercer
	😑 Dummy Contract	Other		
	😑 Essex Social Servi	Other	Alert times - Low	90 Medium 30 High 15 Default contra
	😑 Foxx, Jamie	Midlands Private		
	Active Inactive Show all	47		
	Find			New 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.

Waiting	•
	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

	Name / Ref	Type	Contraction	
6 55	57 test 557 Test	Private	Contract name	Barker, Sue
	bla Mabal	Noth Private	Customer	Barker Sue
	exandra-Maru F	Midlands Private	Contractions	
	mstrong Lance	North Private	Lontract type	North Private
В	arker. Sue	North Private	Beference no	[]
Be	eaumont, Bill	North Private	1101010100110	1122
🕘 Ci	huckle, Barry	Private	Start date	28/03/2017 👻
🧉 Ca	pe, Sebastian	North Private	Estimated and	Externally visible ?
🛑 Ca	ooper, Bradley	Private	Louinded end	31/12/2099
🛑 Cr	ram, Stephen	North Private	Call monitor	(None) Default status Completed
😑 D.	avis, Steve	North Private		
😑 Di	emo, Demo	Private	Pay on actuals	Defar V Charge Defar Split funding By percent
🗎 🗎 Di	ummy Contract	Other		
🗎 🛑 E:	ssex Social Servi	Other	Alert times - Low	90 Medium 30 High 15 Default contract
📒 Fo	oxx, Jamie	Midlands Private		
Activ	re Inactive Show all	47		
Find		1		New Edit Clo

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



- 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 <u>page 8</u> for how to set call alerts)



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

	(All contracts)	•	General Other	Needs Customer address Invoices Log Clients Funding
	Name ∠ Ref	Туре	Contract name	Barker Sue
	🛑 557 test, 557 Test	Private	<u>.</u>	
	🛑 Able, Mabel	North Private	Lustomer	Barker, Sue 💌 🔦
	🛑 Alexandra-Mary, E	Midlands Private	Contract type	Netth Drivete
	🖌 😑 Armstrong, Lance	North Private		
	Barker, Sue	North Private	Reference no	22
	🚺 ڬ Beaumont, Bill	North Private		
	😑 Chuckle, Barry	Private	Start date	28/03/2017 💌
	🛑 Coe, Sebastian	North Private	Estimated end	Externally visible ?
	😑 Cooper, Bradley	Private		3171272033
	😑 Cram, Stephen	North Private	Call monitor	(None)
	😑 Davis, Steve	North Private		
	🛑 Demo, Demo	Private	Pay on actuals	Defart Charge Defart Split funding By percent
	Dummy Contract	Other		
	😑 Essex Social Servi	Other	Alert times - Low	90 Medium 30 High 15 Default contract
	😑 Foxx, Jamie	Midlands Private		
	Active Inactive Show all	47		
	Find			New Edit Close
l				

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

Pay on actuals	Defa 💌
Alert times - Low	<mark>Default</mark> Yes No

Pay on actuals Yes 💌	Charge	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
- 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

	Timesheets	Personnel	Reports	Letters	Wind				
	Manua	Ctrl+T	2						
	View timesheet events								
ĺ	Current	activity		Ctrl+Y					
	e-mail s	status							
	QA war	nings							

3. The current activity screen consists of numerous tabs

L	2		3	4	5	6	7				
	Login and out	Alerts SMS	Carer	Current a status EMail Log	Ctivity at N	10n 21/01, Notifications	/2019 at 12:25				×
	Activity during p Date	ast 4 🕂	□ Logg Dura	ed in only Carefr Carer	ee Ref No	▼ Client	(My branches) Planned	Dura N	▼ leed	Code	Status
	21/01/2019	12:14-12:16	00:02	Claire Baldin		Fred Perry	12:15-13:30	01:15 H	lousework, Morni		Logged out
					Auto refresh	Auto ou		Befree	h F5 Proview	_	Close
l				V	Auto refresh	🔽 Auto cy	cle	<u>R</u> efres	h F5 Preview	 +	<u>C</u> lose

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

Times	heets	Personnel	Reports	Letters	Wind				
	Manual	Ctrl+T	4						
View timesheet events									
	Current	Ctrl+Y	a						
e-mail status									
	QA war	nings							

3. Click the Alerts tab

L	Login and out Alerts SMS Carer status EMail Log Shift status Notifications											
2	22/01/2019 🗴 to 22/01/2019 🔽 Carefree 🔍 (My branches) 🔍 (All contracts) 🔍 🖸 Open											
	Date	Times	Dura	Carer	Client	Need	Туре	Raised	Respon	By user	Response	Details
	Tue 22/01	07:00-09:30	02:30		Ovett, St	Housew	No Show	22/01/2019 07:17:56	No			
	Tue 22/01	07:30-08:00	00:30		Ovett, St	Bath, M	No Show	22/01/2019 07:47:58	No			
	Tue 22/01	07:30-08:00	00:30		Ovett, St	Bath, M	No Show	22/01/2019 07:47:58	No			
	Tue 22/01	08:00-09:00	01:00		Chuckle,	Morning	No Show	22/01/2019 08:18:00	No			
	Tue 22/01	09:00-09:30	00:30	Baldin, C	Perry, Fred	Morning	No Show	22/01/2019 09:18:05	No			
_										4		
_					🔽 Aut	o refresh	🔽 Auto d	cycle R <u>e</u> spond	<u>R</u> efresł	n F5 <u>P</u> revi	ew 🔻	<u>C</u> lose

4. Double-click an alert to action

⚠	A	lert detail		X
Call details			Alert details -	
Date	22/01/2019 Time critical	No	Raised	22/01/2019 09:18:05
Times	09:00 - 09:30 (00:30) Alert type N	lo Show	Responded	
Client	Porry Fred		Responded	(None)
			Ву	
Carer	Baldin, Claire 07860 2733	321	Computer	
Need	Morning Call - Get Up And Breakfast, F	ersonal	Escalated	
	Care		Details Actuals Reason	Carer forgot to log in 03:05 to 03:35 Forgot to log in or out
				<u>S</u> ave <u>C</u> lose

- 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							2				/	3	
4		Login and 03/01/20 Person	i out Aleri	ts SMS Ca 0 03/01/2019 Type	rer status EMa Carefree Sent on	ail Log Shift status e Details	Notifications	hes) Status	▼ Responded	Open Outcome I	Response		
	-	s 🔺	ue (Client)	Task partially done	03/01/2019 1	only managed to drin Drink Water, Carer w	nk 250, Task was vas Claire	Closed	03/01/2019 1	Appro			
		S	ue (Client)	Meds not done	03/01/2019 1	Medication was Dioo Claire	ctyl, Carer was	Closed	03/01/2019 1	Appro			
		s	ue (Client)	Meds partially done	03/01/2019 1	gdsgnfvbfyhj wouk Medication was Para was Claire	d not allow me to, acetamol, Carer	Closed	03/01/2019 1	Appro			
		CI (Carer)	aire	Carer cover call	03/01/2019 1	The carer has reque on 04 Jan 06:00-07:30, Mornin Breakfast, Personal	ested to cover Bill 2019 at g Call - Get Up And Care	d Open					
	_												
						🗖 Auto	o refresh 🔲 Au	ito cycle		<u>R</u> efresh	F5 <u>F</u>	Preview 🔻	<u>C</u> lose
									5				

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 <u>page 22</u>)
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	View notification details (393)
	Details The carer has requested to cover Bill Beaumont on 04 Jan 2019 at 06:00-07:30, Morning Call - Get Up A And Breakfast, Personal Care
2	
	Response Call has been allocated
3	Status Closed Outcome Approved Save Cancel
	4 5

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

North	Notes Cg	Outcomes Sent box Planner History Continuity
Name 🛆 Phone no	General	Wages Security Branches Log Attachments Extras
5.5.7 Carer, 5.5.7 ca	Sumame [
Bishon John	Forename	China Sex Francis
Clar, Mulana	r orendine	
Davis, Laura	Initials	40 Ref No
Dench, Judy	A Julian C	Unite bull Income and an
😑 Ferrell, Will Ben	Mudiess	A Hume ter 1 U1924 156248
😑 Greenfield, Lynn		Home tel 2
Mirren, Helen		Mahla
Mo		moule
Mouse, Mickey		Callin no
Schofield, Phillip	Durante 1	
Smith, Sue	Postcode	Auto-logout 14
Tester, James	D.O.B.	All All None
Vardy, Jim		Call Manifer type IDN
Wilerby, Holly	NI No.	eriTracker 10020
Williams, Serena	BB tan	BoadBurner 10020
Williams, Venus	1.11.05	
Williamson, Lieorge	Email	Calconinii 00020
	,	
Active Inactive On hold All 00:00 19		
		Η
Find		
!	ASSgenius	InVu Rotas ▼ <u>N</u> ew <u>E</u> dit <u>D</u> elete <u>C</u> lose

- 4. The Carers RoadRunner username is the data entered within the **Forename** field
- 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	
	RoadRunner	10020	
	CallConfirm	00020	

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 <u>page 29</u> 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**

Carefre	e	•	(My brand	hes)		•	☑ 08/01	/2019 💌	to 08/0	1/2019 💌 ÷ Today
Create	d on	▽ Your date Type	Categor	y User	Ref	Caller	Client	Carer	For User	Details
	Jan 201	19								
-0	08/0	1/ 08/01/2 RR Lo	9	Syster	m 72		Barker, Sue	Baldin, Claire	System	Client needs more medication
	08/0 ⁻	1/ 08/01/2 RR Lo	9	Syster	m 71		Perry, Fred	Baldin, Claire	System	Client was not feeling well
							For L	Iser (All us	iers) 💌	Open 💌 Type (None) 💌 Summary 💌 Eind Befresh F5 Qose

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**

Details
Client needs more medication
Outcome
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

Baldin, Claire Reset column widths Bishop, John Clas, Mylene Send a message Davis, Laura Send an email Dench, Judy Ferrell, Will Ben Dial number Greenfield, Lynn 2 Show audit Mirren, Helen х Send a message - SMS sent this month = 0 🔿 SMS 📀 RoadRunner/ Portal < Branch (My branches) ~ Carer Mobile no aldin Clair 07860 273321 Message 36 Can you visit Irs Miggins fo nch call today Please check your rota for next week 12:00 to 12:307 4 5 Home branch Can be replied to -Send 🔺 Messages... <u>C</u>lose C<u>r</u>edits... Spell 3

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.



Carers

1

4. Click Send a Message

25

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

$\Box \bigcirc \Box$	Sent on	T From U	From Carer	From Client	∇ From Other	Subject	Message	Read on	Reply / Original	Replied on	Sorted date
	🖃 🗌 Jan 2019										
In box	L 🗆 🚔 08/	CF	Baldin, Claire				Could someone call Sue Barker	08/01/2019 16:27			08/01/201
	1 Nov 2018										
	🕀 🗌 Sep 2018										
Sent items	🕀 🗌 Jul 2018										
	🕀 🗌 Jun 2018										
(
Deleted items								_			
	ľ										
(All)							<u>P</u> review ▼ <u>N</u> ew	<u>R</u> eply	Eorward	<u>D</u> elete	<u>C</u> lose

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 <u>have not</u> been replied to
- Green messages are messages that <u>have</u> been replied to
- Blue messages are messages that the Carer have sent

	900	
	0	
Today 11:07	From: Lyndsay	
Please call the of	fice ASAP.	
	0	
Today 11:07	SENT TO: Lyndsay	
Can someone ca	ll Mrs Bakers daughter plea	se?
	0	
Today 10:54	From: Lyndsay	
Can anyone cove	r a shift this evening please	?

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 Clients 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
- Rotas
 ▼

 Assessments
 ∧

 Call Monitor
 ⊂

 COS
 ≡

 email Details
 □

 Issued items
 □

 Letters
 Medication

 Messages
 ✓

Clients

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

	(My branches)		•	Medication Z	Dosage	Time	Other time	Form	Route	Location	Support required	Hours in between	
	Name	H Het	Ľ_	Acamprosate		AM						0	99
	Apie, Maper	C 1000		Adialat	apply to area	Lunch		Liquid	Orally		Administer	0	\mathbf{X}
	💧 Alexandra-Mary, Elizab	A		Aspirin		Bed		Blister Pack	Orally			8	-
	Armstrong, Lance			Barrier Cream		Tea						0	
N N	Azalea, Ziggy	С	<u>o</u>	Dioctyl	apply to area	PRN		Cream	Transdermal		Administer	0	
	 Barker, Sue Beaumont, Bill Beckham, David 		<u></u>	Ibuprofen		AM						0	-
			0	Omeprazole	apply to area	Bed		Cream	Transdermal	Bathroom c	Administer	0	-
	Bird, Dickie	В		Paracetamol	2 tablets ever	PRN		Blister Pack	Orally	Mouth	Prompt	4	
	Chuckle, Barry		- 1										-
	Chuckie, Pauline	۵	- 1										
	Coe, Sebastian	В											
	📒 Cooper, Bradley	С											
	🔎 Fram Stenhen												
	Astive Uppetities On hole	al Ail											
	Active Induive On hold												
	Find			Medications Vulnerability Man	agement								
						Г	Active	only Standa	rd	•	Preview •	- <u>C</u> los	se

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 <u>page 5</u>

	1					- 7		
		11	Medication Item					
	2	Medication	Amoxicillin	Dosage	2 x 250mg tablets			
		Time	AM 💌	Other time		8		
3		Form	Blister Pack 🔹	Route	Orally 🗸 🔽			
		Location	Medication cupboard in kitchen	Support Requried	Prompt	9		
4-		Hours in between	8			, j		
		Notes	500mg every 8hours	Start date	21/01/2019 🗸	10		
5 -			×	End date	31/12/2099 🔽			
					Save Cancel			
	6							
	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 betwee						
		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 31/3	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.

Call details for Barker, Sue								
me Critical & Event Notes Expenses and Mile 10:15 Type Weekly 10:45	age RoadRunner Medication Medication Time Run [(None) Contract Barker, Sue Site [(None) Site call must Override the defa [(None)	Notes Baldin, Claire	• •					
y them to ▼ C Upto w/e 03/02/2019 ▼ ÷ C This week & beyond 31/12/2099 12/11/2018								
	P1684	Save	<u>C</u> ancel					

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.

