CareFree Transactions Portal Training Guide

Page Contents

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10/01/2019	Kayleigh Bainbridge	Transactions Portal V2.0.1 RoadRunner V4.3.1	V1

Introduction

The CareFree Transactions Portal is designed to help you manage the RoadRunner application which operates on your companies' devices. It can be used to track Carer log ins with Clients while also having the ability to update and customise the information Carers can view in the mobile phone application.

Logging into the Transactions Portal

To access the Transactions Portal, open a web browser and enter https://rrtransactions.carefreeapp.co.uk/login.aspx as the address. You will be taken to the login screen which will look like the screen below:
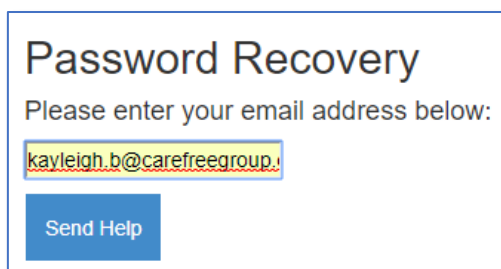

To access the Transactions Portal, you will need to be a registered user and enter the registered email and matching password to log in.
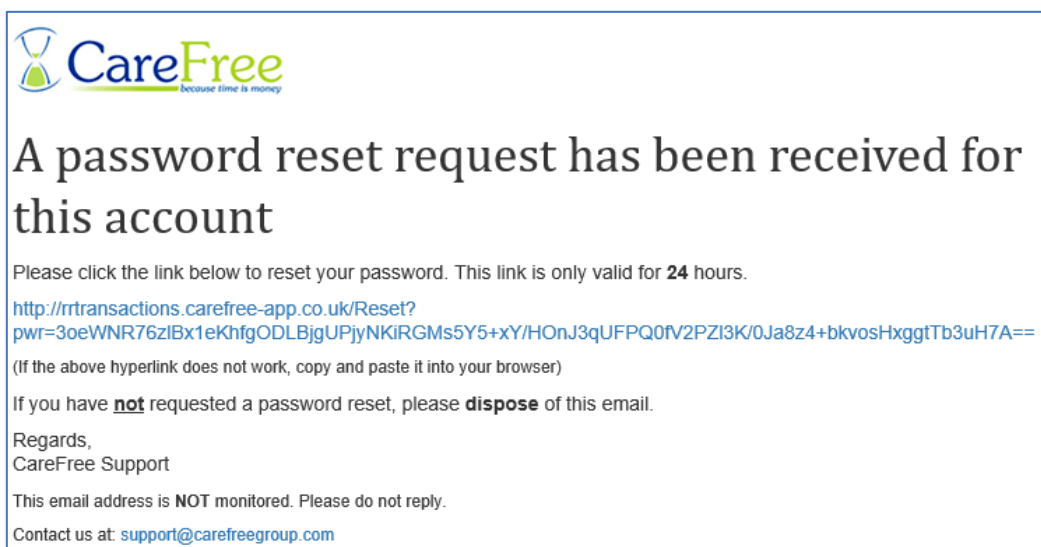
If this is the first time you are attempting to access the Transactions Portal, you will have been assigned an Administrator login. If you have not been given these details, Support will provide one for you.

Should you forget your password, you may reset it at any time by clicking **Forgotten your password?**. Enter the registered email address and press **Send Help**.

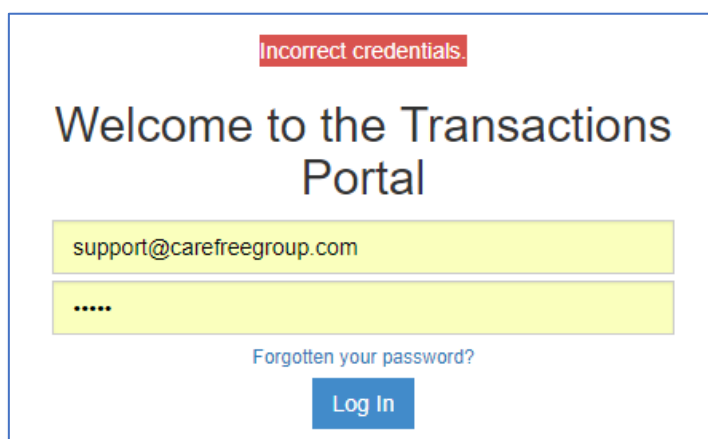Once a password reset has been requested, you should then receive an email to your registered email address with a link to reset your password.

The screen will show a warning of '**Incorrect credentials**' if you have entered an incorrect email/password combination.

User Types and Permissions

There are two types of user in the Transactions Portal and their permissions differ.

Standard User

Standard users can perform the following functions:

- View Transactions

Administrator

Administrators can perform the following functions:

- View transactions

- Configure RoadRunner (via **Company Options)**

- Remotely update Carer phones with new RoadRunner company Options and phone numbers

- Manage users or add new users to be able to access the Transactions Portal

Transaction Portal user permissions are summarised below:

	Enabled permission
	Disabled Permission

	User Types	
Permissions	User	Admin
Add Users / Delete Users		
Add Admin / Delete Admin		
Manage Users		
View Transactions		
View Company Options		
Edit Company Options		
Push Company Options		
View Phone Numbers		
Edit Phone Numbers		
Push Phone Numbers		
Switch Company within group		

All users will automatically be logged out of the Transactions Portal after 10 minutes of inactivity. This may result in the loss of any changes that are unsaved.

Portal Layout

When logging into the Transactions Portal, both standard users and administrators will be presented with the following screen.

It is possible to customise this screen with your own company logo. Your logo will be displayed in the top left-hand corner where the CareFree logo can be seen above. To have your own logo, send a copy of your logo to support@carefreegroup.com.

Your email address (or whoever is currently logged in) will be displayed at the top of the screen. Your own company name will be displayed instead of 'CareFree Excel Exhibition' towards the centre of the page.

A **log out** button is always provided at the top of any screen within the Portal.

The layout may appear different depending on your screen size; particularly if you are viewing on a mobile device. The log out button can be found in the side menu on mobile devices.

Using the Portal – Transactions

Standard users and administrators have access to the Transactions page, which displays the times and durations for individual Carer visits at Client locations, as well as summary data for a full week.

Viewing Transaction Data

Search Filters

A date filter can be applied when searching through the transactions. Click into the **Week** box and select a date.

Transaction data can be filtered further by using the drop-down menus to pick an individual Carer or Client. If you would like to view all transactions set the Carer and Client drop down boxes to **All**.

The **Previous** and **Next** buttons can be used to move forward or backwards by one week. The transaction data can be displayed in a daily view or a weekly view.

The weekly view will show data from the Monday to Sunday of the week selected. If you select the 11th January this will display the 7th January to the 13th January.

☐ Manual Only ☐ Date Warnings ☐ Distance Warnings ☐ No Out ☐ No Client [400] Distance (meters)
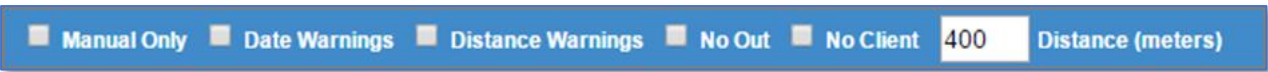
- The **Manual Only** filter will only show transactions where a Carer has logged out manually. This option can be disabled within the Options.

- The **Date Warning** filter will only show transactions where a date warning has been issued. This will indicate when the carers handset date/time stamps are different to the server.

> The time tolerance, e.g 10 minutes difference, can be changed within the Company Options page. If the time the Carer scanned out is more than the tolerance allows then a warning will show. A link is provided so you can view the recorded times for those transactions.

- The **Distance Warnings** filter will only show transactions where a distance warning has been issued. This will indicate if the distance between the logged in location and the logged out location is over the limit entered in the '**Distance (meters**)'.

> This feature relies on GPS co-ordinates generated by RoadRunner, the accuracy will vary between mobile devices.

- The **No Out** filter will only show transactions where the Carer has not logged out.

- The **No Client** filter will only show transactions where there is no Client is listed in the transaction. This happens when RoadRunner has not been enabled in the Clients record in CareFree.

Call Monitor type	PIN	
eziTracker		☐
RoadRunner	10010	☑

> To enable a Client to link to the RoadRunner transactions, select the Client who the No Client is showing on. Click on the Edit button and tick the Call monitor type RoadRunner.

The Transactions Summary Table

When the transaction data is displayed, a summary table appears above the individual transactions.

Carer	Client	Total Scans	Completed Visits	Total Time	Manual	% Manual	Distance Warnings	Date Warnings
All	All	63	24 of 39	02:01:06:48	7	29.17%	0	0

If a large amount of data has been selected, the full results may be sorted into several pages but the summary table, includes the data from all transactions.

- The **Carer** column displays the name of the Carer you have selected in the Carer filter. If not, the column will display **All**.

- The **Client** column displays the Client you have selected in the Client filter. If not, the column will display **All**.

- The **Total Scans** column shows the total number of scans made.

> A scan is when a Carer logs in or log out using their RoadRunner handset. A scan can be completed by using either a QR code or an NFC Tag.

- The **Completed Visits** column shows the number of completed visits. A completed visit represents the amount of times a Carer has correctly logged in **and** logged out of a call.

> In some cases a Carer may have logged in but has forgot to log out. '3 of 3' completed visits represents 3 calls correctly scanned by RoadRunner. Should a Carer forget to log out of one of the calls '2 of 3' would display.

- The **Total Time** column shows the duration of all the completed calls for the data selected.

- The **Manual** column shows the number of completed calls where a Carer has manually logged out.

> It is possible to prevent Carers from completing manual log outs by configuring the RoadRunner company options. Company options will be covered later in this guide.

- The **% Manual** column shows the percentage of completed calls where a Carer has manually logged out.

- The **Date Warnings** column indicates when the date and/or time has been altered or on the Carer's handset. The screenshot below is an example of how the date warning will appear in the transactions list.

| IN | 28/11/2016 15:18:56 | OUT | 28/11/2016 15:32:41 | 00:13:45 | N/A | Warning | Complete | View |

The Transactions Table

The Transactions Table gives a full breakdown of information for every transaction. The points below describe what each column indicates.

Carer	Client		Logged In		Logged Out	Duration	Distance	Dates/Times	Sent To CareFree	
Bob Marley	Dawn French	IN	18/03/2019 14:38:34	OUT	18/03/2019 14:42:02	00:03:28	Map		Complete	View
Bob Marley	Dawn French	IN	18/03/2019 15:33:04	OUT	18/03/2019 15:36:29	00:03:25	Map		Complete	View
Claire Baldin	Fred Perry	IN	19/03/2019 12:12:55	OUT	19/03/2019 12:16:58	00:04:03	Map		Complete	View
Bob Marley	Dawn French	IN	19/03/2019 14:11:26	IN	19/03/2019 14:30:59	00:19:33	Map		Complete	View
Bob Marley	Albert Einstein	IN	19/03/2019 14:25:32	M	19/03/2019 14:29:04	00:03:32	N/A		Complete	View

- The **Carer** column shows the name of the carer who completed the transaction.

- The **Client** column shows the name of the client where the transaction was completed.

- **IN** – shows that the carer has logged in using an NFC tag or QR code.

> If GPS logging is enabled the word IN will be hyperlinked. Clicking on the link will open Google Maps and display where the Carer logged in.

- The **Logged In** column displays the date and time that the carer logged in

- **OUT** – shows that the carer has logged out using an NFC tag or QR code. If an **M** is displayed this means the carer has manually logged out

> **If GPS logging is enabled the OUT or M will be hyperlinked to display where the Carer logged out. Click on the link will open Google Maps and display where the Carer logged out.**

- The **Logged Out** column displays the date and time when the carer logged out

- The **Duration** column shows the time difference between the log in and log out time i.e. the length of the call

- The **Distance** column shows the distance between the log in and log out locations if GPS has been recorded for both. By clicking **Map** this will show the travel distance on Google Maps

- The **Dates/Times** column will show if there is a date warning

- The **Sent to CareFree** column will show if the logged in and logged out times have been sent to CareFree

> **If the Sent to CareFree displays the word Complete, it means the Carer has logged in and logged out. This may show IN Sent which means the Carer has logged in but has not yet logged out.**

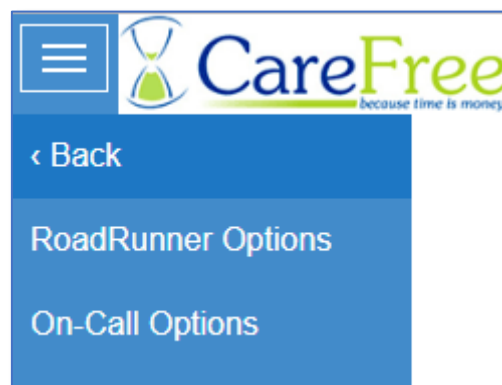- **View** will show more detail about the transaction

Using the Transactions Portal

Configuring the Options

To configure the options for RoadRunner, Select the options box in the top left-hand corner. This opens the navigation panel of the Transaction Portal. Select Options.
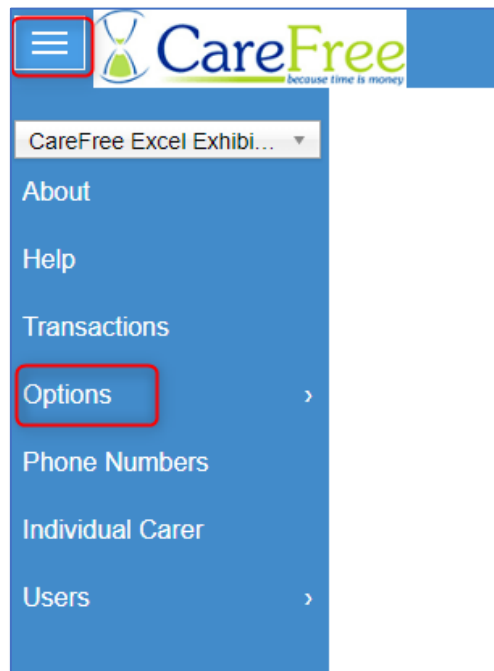
In **Options** there are two options to choose from – **RoadRunner Options** and **On Call Options**.

Once you have amended your options you can push them out to all of your Carer's handsets.

RoadRunner Options

Option Name	Description
Tag Touch Interval	If switched on this is the number of minutes from when the Carer has logged in to when they can log out of a call.
Save Password	Allows passwords to be saved on all Carers handsets.
Allow Change User	Allows Carers who are logged into RoadRunner to be changed without having to reinstall the app.
Display Rota Details	Allows Rota details to be viewed on RoadRunner
Display Client Phone Number	Displays the Client's phone number on the Rota
Display Client Keysafe	Displays the Client's keysafe number on the Rota
Display Double-up Carer	Displays if there is a double-up call and who the double-up Carer is.
Display Contacts	Displays the contact names for the Client in the Rota i.e Next of kin, Social worker
Display Call Notes	Displays the call notes for the call on the Rota
Display Meds	Displays the Client's medication on the Rota
Rota Logout Time	Returns the Carer to the menu screen if no activity after a set time. This time is measured in seconds.
Display Actual Times	Displays actual times instead of planned times.
Allow Manual Signout	Allows Carers to manually log out without using a QR code or NFC tag.
Actual Time Tolerance	Allowance of time difference between the phone and the server. If the difference is greater than the value a date warning is issued. This time is measured in minutes.
Carer Messaging	Allows Carers to send messages to CareFree.
Display General Notes	Displays general notes on the Rota.
Display Entry Method	Displays entry method notes on the Rota
Prompt for Driver	Prompts the Carer to select whether they are a driver on the call to calculate mileage payment.
Display Carer Hours	Displays the Carer's weekly hour on the Rota.
Display Contact Numbers	Displays the Client's contact telephone numbers on the Rota i.e. Next of Kin, Social workers
Rota Format	Displays whether the Carer view the calls by start time with the duration in minutes or the start time and a finish time.
Send Log	Enables or disables the ability for the Carer to send call notes into the daily log in CareFree. They can create these notes either from the 'Purpose of Call' screen or when signing out of the call.
Show DOB	Displays the Client's Date of birth.
Send Log Message	Displays the message that appears if the Send Log option is enabled. This field can be customised.
Play Sound with Message	Allows a sound to be played when a message is received on a Carer's handset.
Pass System	This is selected if you have Pass integration set up. When viewing a call's details, you can press the Options button and sign into Pass.
Allow Manual Signout Button	Shows a manual sign out button on the RoadRunner menu.
Show Call Timer	Displays a call time when logged into a call.
Show Duration on Logout	Displays the call duration when logging out of a call.

Show Unallocated Calls	Displays Unallocated call option from the main menu. If enabled it allows Carers to view unalloctated calls on a set date and select a call and send a request to cover that call.
Carer Can Request Leave	Allows the Carer to request leave from RoadRunner. This is sent into CareFree.
Show Planned vs Actual As Percentage	Displays an indicator on each call with a percentage on the planned vs actual time of the call
Display Message Reply Button	Hide/ Show the reply button when a message has been received.
Task Management	Enables Task Management.
Password Protect Rota	Prompts the Carer to enter their password when viewing the rota
Password protect Messages	Prompts the Carer to enter their password when viewing messages
Password protect Transactions	Prompts the Carer to enter their password when viewing the Transactions
Password Protect Logs	Prompts the Carer to enter their password when creating call logs
Prompt for Driver CH	Prompts the Carer to select whether they are a driver on the call to calculate mileage payment for care homes
Calculate GPS Co-ords CH	Calculates the GPS Coordinates of where the Carer has scanned in for care homes
Send Log CH	Enables the Carers to create a contact log against a care home
Logout Text - CH	The log text that appears to a Carer when creating a contact log against a care home
Password Protect Unallocated Screen	Prompts the Carer to enter their password when viewing the unallocated calls
Password Protect Call Notes	Prompts the Carer to enter their password when viewing call notes

Please be aware some of these options may not be available for your company configuration.

If any of the options are amended there are two buttons to choose from.
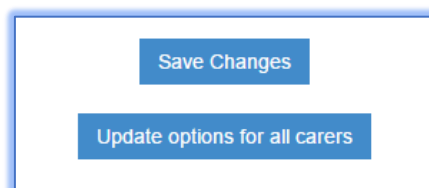
- **Save Changes** will save the changes on the Transaction Portal but this doesn't automatically change the settings on the Carer's handsets.

- **Update options for all carers** will save the changes and push all the options out to the Carer's handsets.

Phone Numbers

It is possible to enter a directory of contact numbers which can be accessed by the Carers within the RoadRunner application.

To view the phone numbers. Select the **Phone Numbers** option from the navigation menu.

Adding, Editing and Deleting Phone Numbers

The first column displays the name of the phone contact and the second column shows the phone number.

- To add a new phone number. Enter the contact name and telephone number into the two blank text boxes at the bottom of the phone number list. Click **add** to save the number.

- To amend a contact. Click **Edit** button next to the contact.

- To update the contact name or telephone number change the text in the appropriate field and click **Update**.

- To delete a contact, click **Delete** – a prompt will then ask if you are sure. Click **OK** to confirm the deletion or **Cancel** to keep the contact.

- To update phones numbers on all Carers handsets. **Press Update phone numbers for all carers**.

When the phone numbers table is empty a note at the top of the screen will display **There are no phone numbers to show**. You can begin adding numbers to the directory by completing the text boxes and clicking the **Add** button.

Individual Carer

The individual Carer section allows you to push phone number updates or RoadRunner option updates out to an individual Carer.

From the navigation menu select **Individual Carer.**

> This feature is not designed to allow you to update individual Carers with different settings. It is designed to RESEND the SAME companywide options and phone numbers to an individual Carer.

Updating an individual Carer

To update RoadRunner settings and/or phone numbers to an individual Carer's handset.

1. Open the **Individual Carer** screen

2. Select the relevant Carer from the drop-down list

3. Once a Carer has been selected, you can either update their Company Options or the phones numbers (or both). To do this select the appropriate update button.

When RoadRunner receives the update, a notification will appear on the Carer's handset.
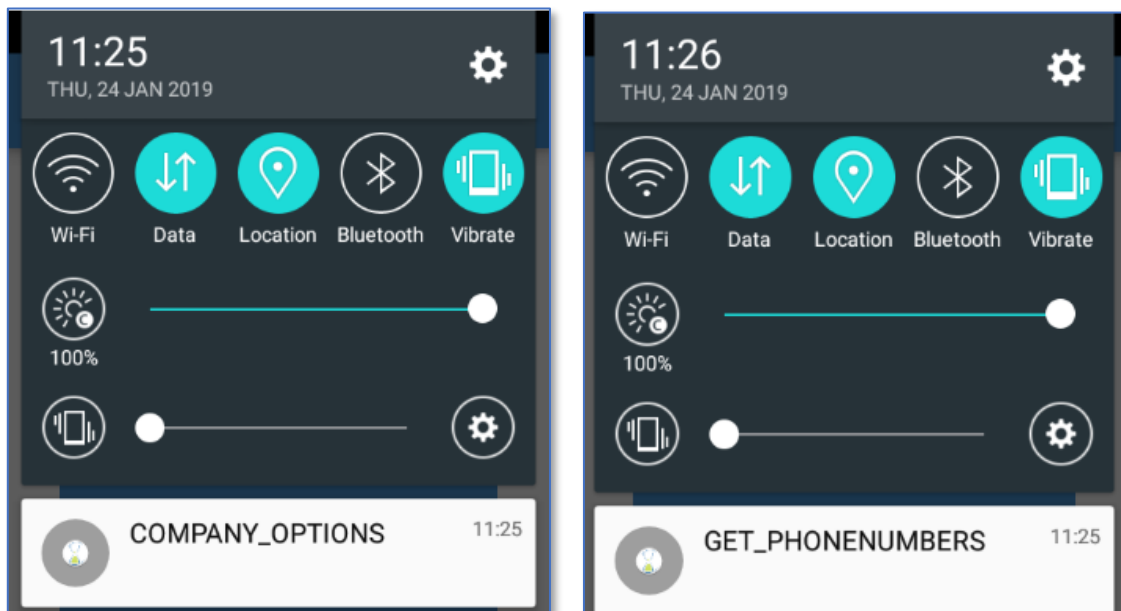
User Management
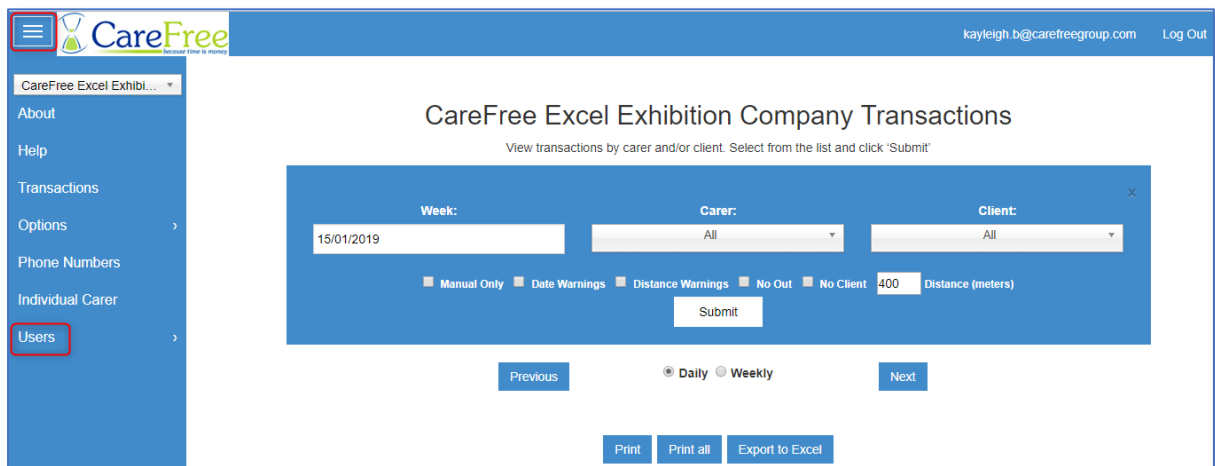
There are two options available in the **Users** section: **Register User** and **Manage User.**

Register a User

To register a new person to be able to access the Transaction Portal.

1. Select **Users** from the navigation menu

2. Then click **Register User**
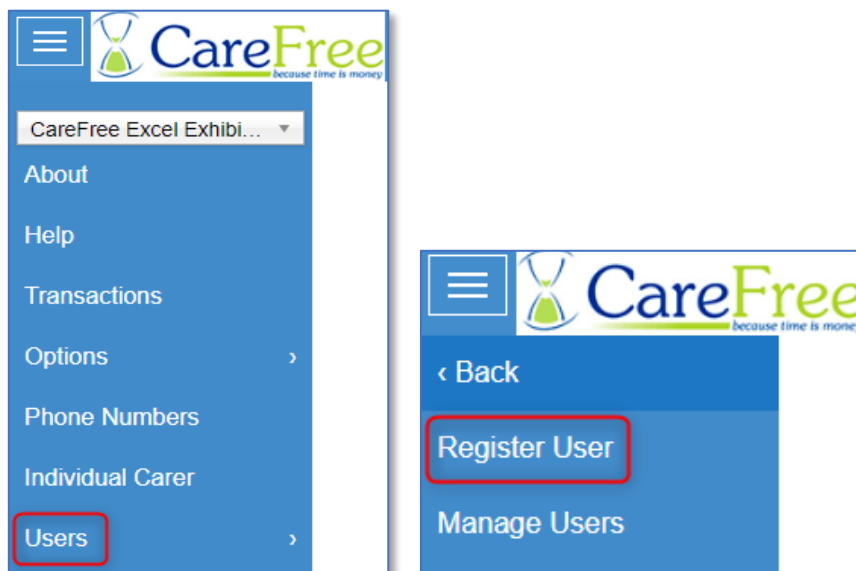
3. Enter an email address, password, password confirmation, and select a user type. You **must** enter an email address that is currently in use or you may struggle to reset your password later.

Register a new user for the Portal

Email:

Password:

Confirm Password:

User Type: User ▼

Forgotten your password?

Submit

If you have forgotten the password to your account, or another account you can request reset instructions by clicking the **forgotten password** link below the form.

There are 2 user types that can be selected, **User** and **Administrator**. Standard users cannot register new users of the Portal.

Once all fields have been completed click the '**Submit'** button.

If the user registration is successful, the Portal will notify this with a **Successful** message.

Successful

Register a new user for the Portal

Email: kayleigh.b@carefreegroup.

If the user already exists, or the submission is unsuccessful for any reason, a message will display in the same location with the result of the form submission.

A User already exists for that email address

Register a new user for the Portal

Email: kayleigh.b@carefreegroup.
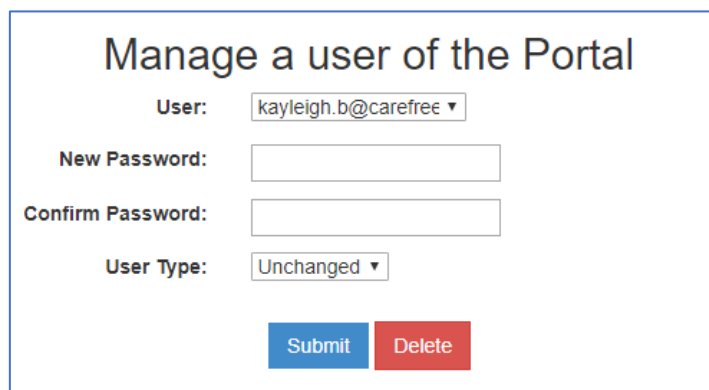
Manage Users

To update an existing user of the Transactions Portal:

1. Select **Users** from the navigation menu

2. The click **Manage Users**
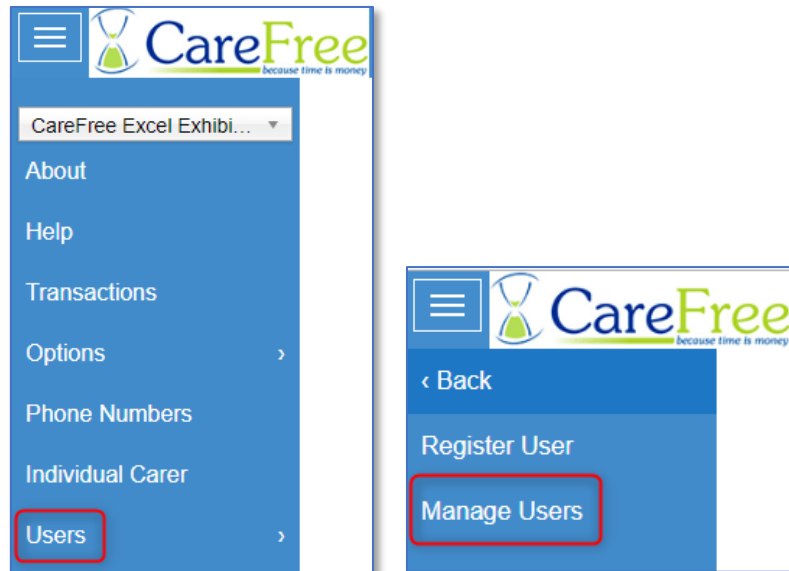
This page allows Administrators to manage users of the Portal.

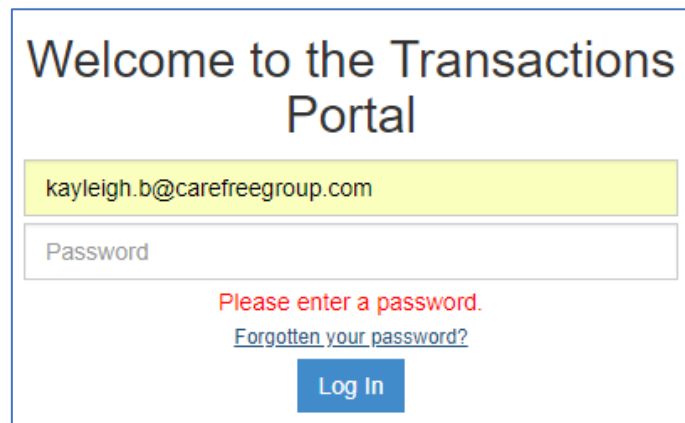3. Use the **User** drop down list to select the user you wish to edit.

You can select to change either the password and/or the user type.
Should you wish to only change the user type, you may leave the password fields blank.

4. When the changes have been made click the **Submit** button. If the Portal user needs deleting click the **Delete** button.

Password Recovery and Reset

If you forget what your password is, you are able to reset your own password in the Transactions Portal. From the log in screen click on **Forgotten your password**.
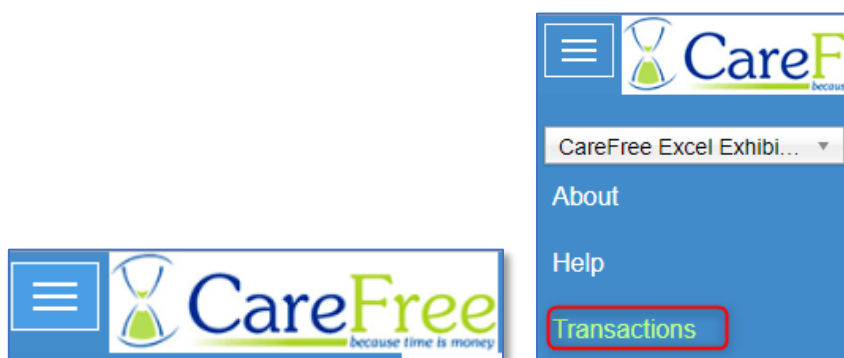

If you don't already have an email address registered on the Portal or you have forgotten your email address you must contact support.

Portal Navigation Bar & Help

This section covers the other options available in the navigation menu.

Company Logo

Clicking on either the company logo or the Transactions option within the navigation bar will take you either to the log in page (if not logged in) or the transactions page (if logged in).

About

This option takes you to the **About** page which tells you about the Transaction Portal and CareFree.

This page will also give you to the CareFree contact information. You can view the CareFree office phone number and support email address.

Help

This option takes you the help page where you can download the latest version of this user guide or fill out a support form to contact our team.

Log Out

This option will log you out of the Portal.

Troubleshooting

Should you run into any issue with the Portal that you cannot seem to resolve, a '**reset**' approach may fix the issue. Logging out and then back into the Portal should refresh the data and resolve your issue. If for whatever reason, you cannot log out of the Portal, loading the Error page manually will reset the Portal and Log you out. Click on the following link to complete this process: https://rrtransactions.carefreeapp.co.uk/LogOut.aspx

If neither of these methods resolve your issue, please use the feedback form on the Help page (if accessible) or contact support at: support@carefreegroup.com.

Setting a Company Logo

If you would like to set up a company logo please contact support at support@carefreegroup.com