



# Carefor

Software For Companies That Care

## Training Pack for Office Staff: Using the Desktop System



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# Five Steps to Better Care

CareFor is an integrated suite of tools. These support you through five critical stages of compliance and sustainability. This guide will take you through how to use these and your system efficiently and effectively.

## Plan

Use your precious resources efficiently, match skills to service user needs and ensure you consistently meet service user needs.

## Schedule

Streamlined rostering to minimise travel time and costs, while maximising continuity of care.

## Deliver

Effortless remote call and service delivery monitoring using a smartphone app. Care workers have person-centred task lists and can record medication admin using the eMAR function.

## Monitor

Automated confirmation of delivery and simplified reporting for CQC and contract compliance. Early warning of delivery issues and any risks of non-compliance.

## Payment

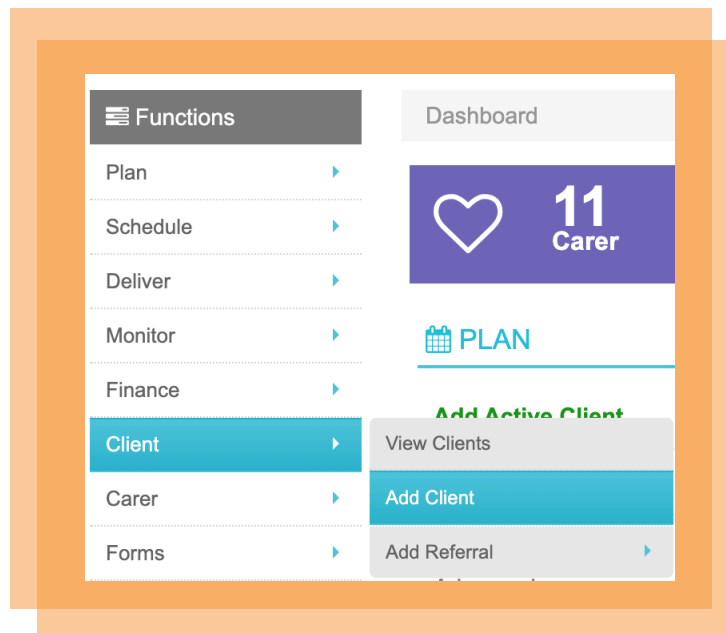
Fully automated billing and payroll data ensures you, and your team, get paid promptly and accurately



# Plan

## Adding Clients

To add a new client to the system, you firstly need to **locate the 'Client' tab**, this is found under the 'Functions' menu. From here, you will need to **click 'Add Client'**:

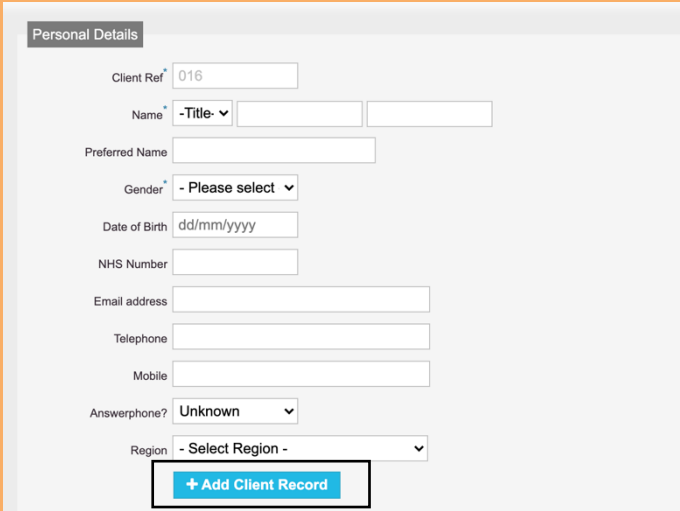


To create the client's profile, you will require the following information:

- Client ID (if you have your own system for client ID numbers, you will enter this here, otherwise the system will auto generate a number for you)
- Client Name
- Client Gender

Please note: When filling out the NHS number box it is imperative that only the NHS number for the specific client is used.

Once you have entered the information required, click 'Add Client Record':

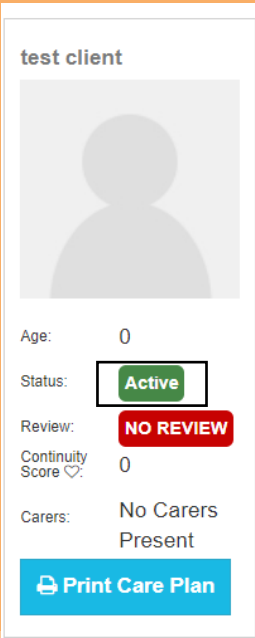


The screenshot shows a 'Personal Details' form with the following fields and values:

- Client Ref: 016
- Name: -Title- (dropdown), [ ] [ ]
- Preferred Name: [ ]
- Gender: - Please select (dropdown)
- Date of Birth: dd/mm/yyyy
- NHS Number: [ ]
- Email address: [ ]
- Telephone: [ ]
- Mobile: [ ]
- Answerphone?: Unknown (dropdown)
- Region: - Select Region - (dropdown)

The '+ Add Client Record' button is highlighted with a black box.

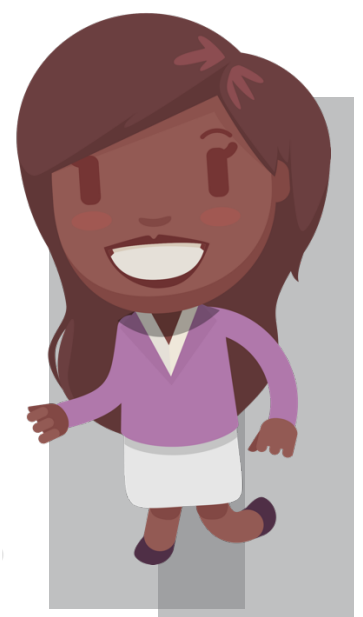
Please note, once the client has been added he/she will show as active on the system if their referral date is the current date. However if the referral date is in the future, they will be moved to the referral section.



The screenshot shows the client profile page for 'test client' with the following details:

- Age: 0
- Status: Active (green box)
- Review: NO REVIEW (red box)
- Continuity Score: 0
- Carers: No Carers Present

A 'Print Care Plan' button is visible at the bottom.



You have two options to change the client's status to 'Active'. You can either go to the client profile and scroll down to "referral details" and then change the service start date to the current date and press save.

Referral Details

Referral Received  Is Client aware of referral?

Referred For

Weekly Hours

Contract Date

**Service Start Date**

Expected End Date

Service End Date  Entering a service end date will archive Graham from that date. Graham currently has no activity.

Reason Left

Or you can go to the 'Client' tab, then 'View Clients' and select the referral tab at the top. Select the tick box next to the client you would like to make active, once you have selected the tick box go to the bulk action menu and select 'Make Clients Account Active'.

Dashboard / All Referred Clients

Referrals Active Clients Suspended Clients Archived Clients + Add Client

Bulk Action / Select Bulk Action

Showing 1 - 1 of 1

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

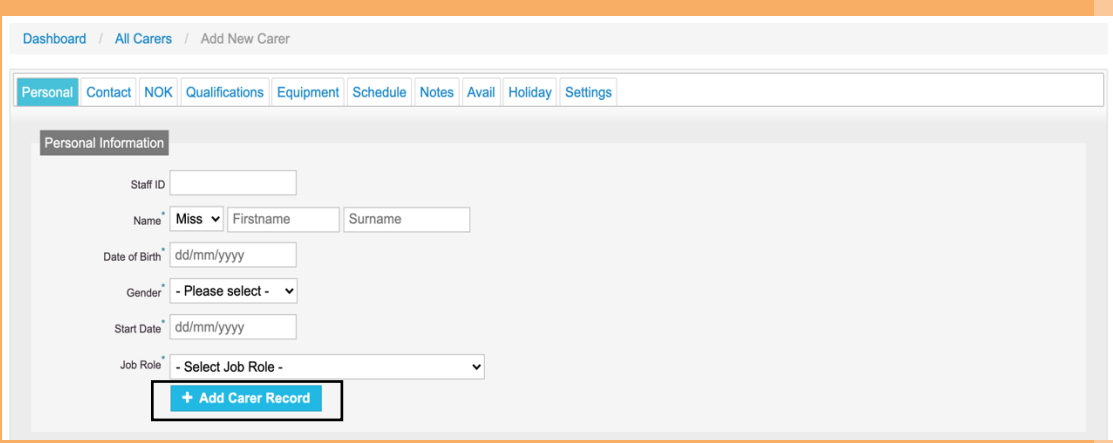
Ref	Client	
<input checked="" type="checkbox"/>	016 <b>Graham Dover</b>	Graham Dover is due to start on 15/10/2020

- Make Clients Account Active
- Archive Client Account
- Email Schedule
- Print Schedule
- Print Client List

## Adding Carers

From the 'Functions' menu on the left, hover over "Carer" or "Staff" (depending on which you would like to add) then choose 'Add Staff' (or 'Add Carer').

In order to add a carer or staff, as a minimum you need to enter "Name, Date of Birth, Gender and Job Role" (all marked by a blue asterisk). Once you have filled in the required details, click on "Add Carer Record" (or "Add Staff Record") to add them to CareFor.



The screenshot shows the 'Add New Carer' form in the CareFor system. The breadcrumb trail at the top reads 'Dashboard / All Carers / Add New Carer'. Below this is a navigation bar with tabs for 'Personal', 'Contact', 'NOK', 'Qualifications', 'Equipment', 'Schedule', 'Notes', 'Avail', 'Holiday', and 'Settings'. The 'Personal Information' section contains the following fields:

- Staff ID:
- Name:  Miss  Firstname  Surname
- Date of Birth:  dd/mm/yyyy
- Gender:  - Please select -
- Start Date:  dd/mm/yyyy
- Job Role:  - Select Job Role -

A blue button labeled '+ Add Carer Record' is located at the bottom of the form.









Once you have added the new staff profile, you will need to amend their access level to ensure they are able to access CareFor.



## Amending Access Levels

Within CareFor, you can choose what information different users can see, and you can also control how they access the system.

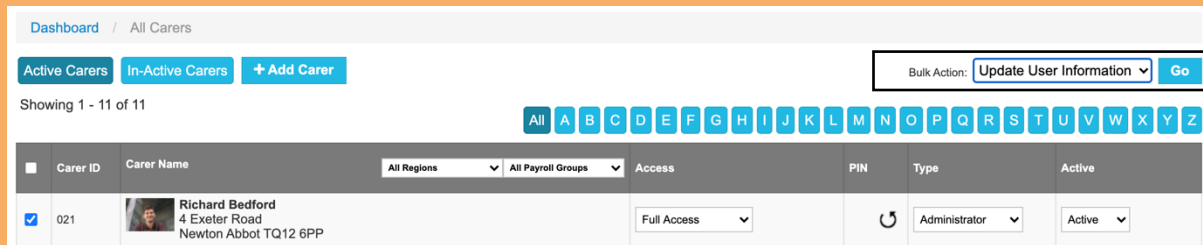
You can see the current access levels and types for your organisation, by selecting the **all carer** or **all staff** list. The "Access" and "Type" columns display this information:

	Carer ID	Carer Name	All Regions	All Payroll Groups	Access	PIN	Type	Active
<input type="checkbox"/>	021	 <b>Richard Bedford</b> 4 Exeter Road Newton Abbot TQ12 6PP			Full Access		Administrator	Active
<input type="checkbox"/>	014	 <b>James Bloggs</b> 1 Highweek Street Newton Abbot TQ12 1TG			Full Access		User	Active
<input type="checkbox"/>	028	 <b>Kirstie Hichens</b>			Full Access		Administrator	Active
<input type="checkbox"/>	023	 <b>Howell Hughes</b> 7 Meadowcroft Drive, Kingsteignton Newton Abbot TQ12 3PB			Full Access		Supported Living	Active

The following table shows what each level of "Access" allows carers and staff to see:

Access Type	Access from Computer	Access from Tablet	Access from Smartphone
No Access	x	x	x
Electronic Logging	x	✓	✓
Full Access	✓	✓	✓

If you have amended a carer or staff member's access level or type, you must remember to save the changes. This is done using the "Bulk Action" drop down, selecting "Update User Information" and clicking "Go":



## Adding Regular Visits

To add regular visits for clients on CareFor, you need to go to "Client" – "View Clients". Within the all clients page, you then need to locate the service user you want to add the regular visits for and click their name.

Inside the client's profile, you need to click into the "Care Plan" tab and then open the "Regular Assignments / Services". To add a regular visit, click "add Assignments" and input the assignment details:



**Add New Regular Assignment**

Select Service User: Office Training

Assignment Type: Assessment

Location: Service User Home

Assignment Time: 12:05am - 7:50am

Earliest Start Time: 12:05am (0 mins)

Latest Start Time: 12:10am (5 mins)

Service Start date: 27/07/2020

Service End date: 12:15am (10 mins)

Visit Frequency: Weekly

No. Carers: Single Handed

Funded By: Self funded

Funding Contribution: 0.00

Contract Reference:

**Schedule**

All	Mon	Tue	Wed	Thu	Fri	Sat	Sun
✓	✓	✓	✓	✓	✓	✓	✓

You can add any visit expenses or scheduling notes to the regular assignment.

Once you are happy with the information entered click "Add Assignment" and the regular visit will show in the care plan.

**Regular Assignment / Services (Click to hide)**

Time	Name	Location	Frequency	Type of Assignment	No. Carers	Mon	Tue	Wed	Thu	Fri	Sat	Sun
12:05am - 7:50am	Office Training	Service User Home	Weekly	Assessment	1	✓	✓	✓	✓	✓	✓	✓

[+ Add Assignm](#)

To assign regular carers to the regular visits double click on the regular assignment. You will then be presented with the same box when you add a new regular assignment on.

Select the day you would like to assign a regular carer too and then select the carer

from the drop-down box. If you have different regular carers for different weeks, you can click the 'add week' button to add another carers name.

**Edit Assignment - Office Training**

Service Start Date: 27/07/2020  
Service End Date:   
Visit Frequency: Weekly  
No. Carers: 1  
Funder: Self Funding  
Funding Contribution:   
Contract Reference:

**Schedule**

MON	TUE	WED	THU	FRI	SAT	SUN
✓	✓	✓	✓	✓	✓	✓

**Thursday Week 1** - Select the regular staff for Office Training on Thursday  
Select the first staff:

## Using Rounds - Creating a Round

To create a round access the Functions menu, go to "Plan", 'Visits" and choose "Rounds".

**Functions**

- Plan
- Schedule
- Deliver
- Monitor

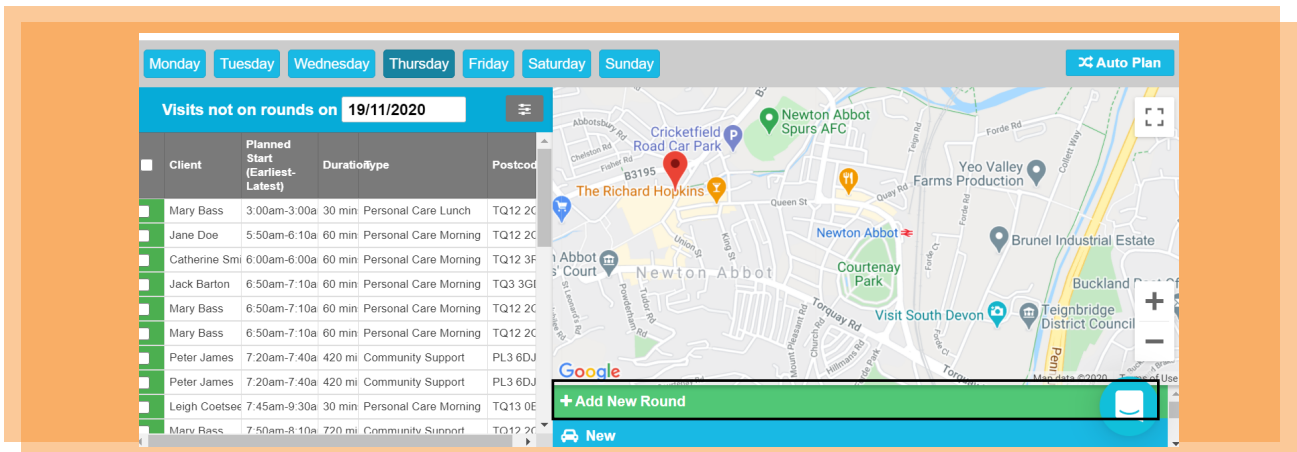
**Dashboard**

- Overview
- Capacity
- Visits
  - Regular Visits
  - Rounds
- Risk Assessments

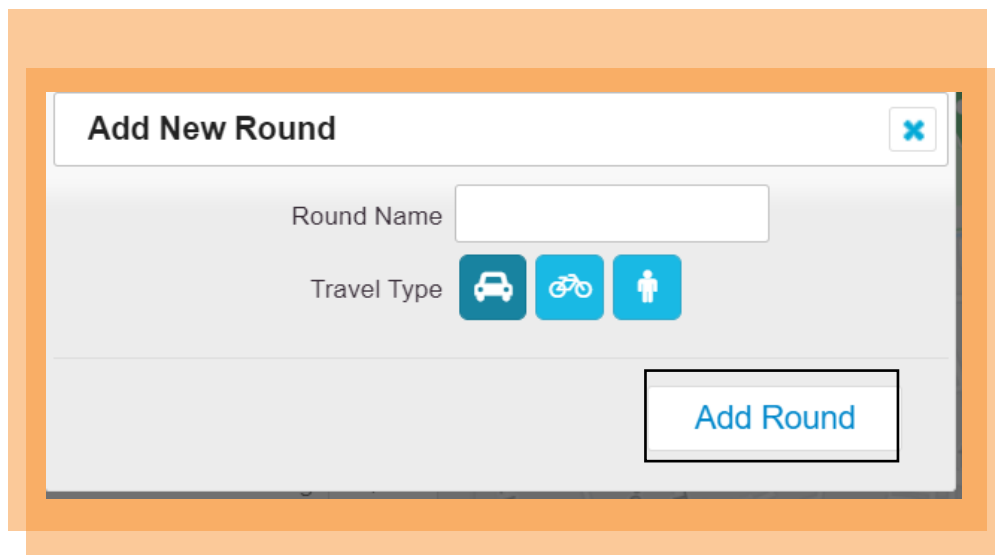
2 Staff



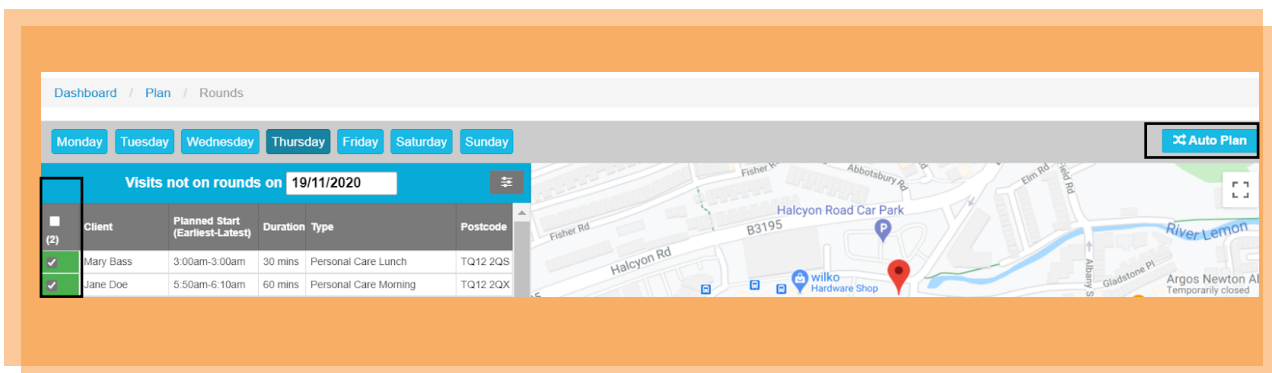
Change the date to the date you need the round to start then click "Add New Round".



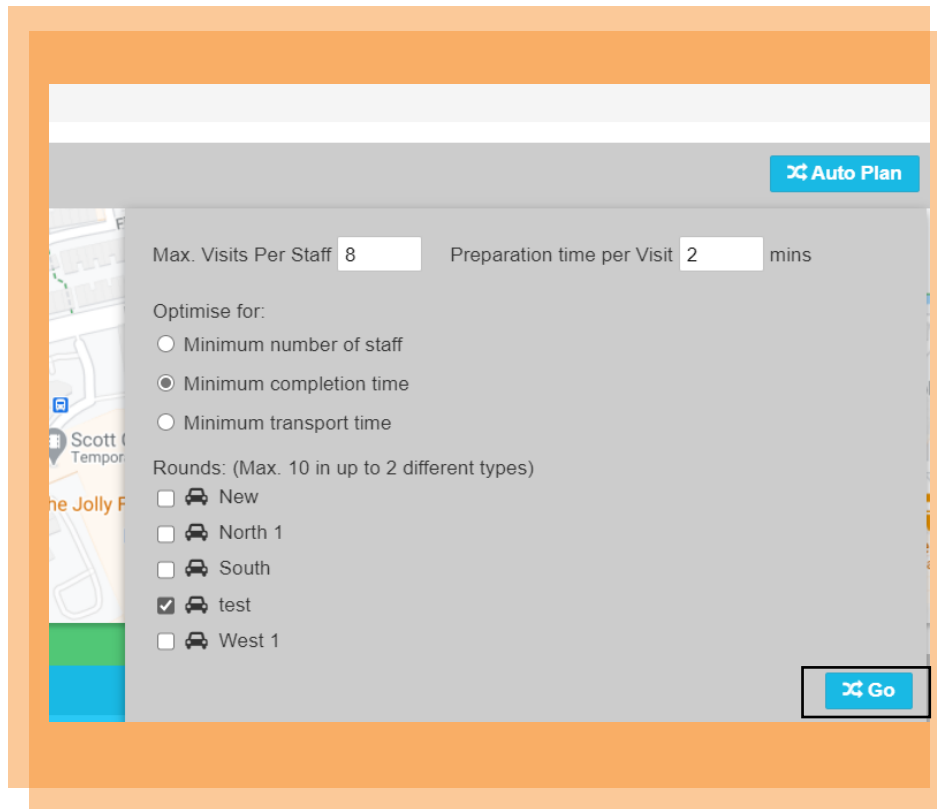
In the pop up that appears, add the Round name and click "Add Round".



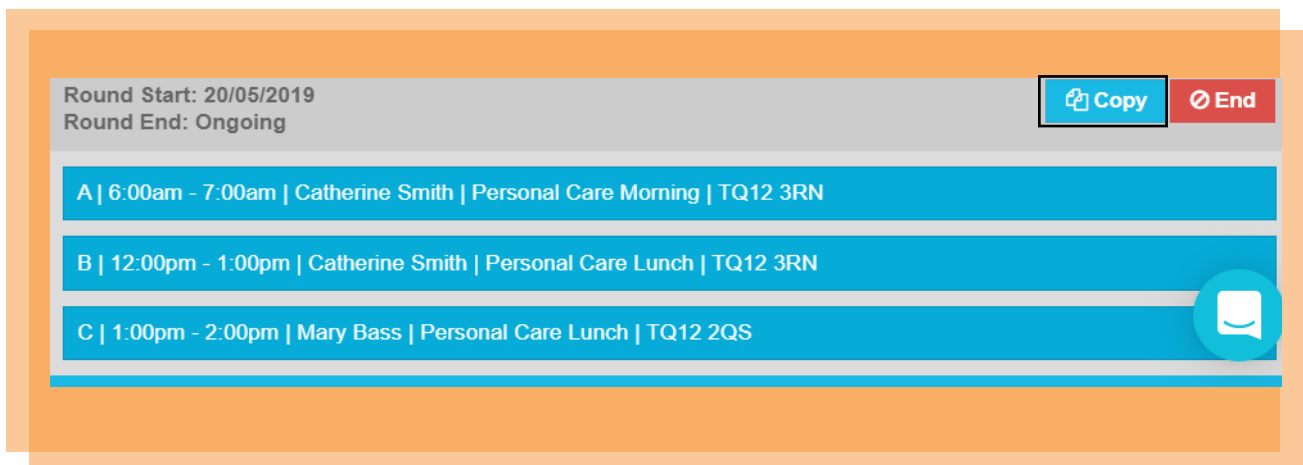
You can now start to build your Round. To do this, select the tick boxes next to the client name and then press auto plan.



Once you press auto plan you will then be presented with another box where you have the option to select the round you would like the calls to go into, as well as other features such as minimum completion time.



Once you're happy with your selection **press go**, and the calls will be put into the round.



If you would like to copy the same round to different days, you will need to press the copy button. You will then be presented with another box which will show you the days you can copy too.

**Copy round "North 1" to other weekdays after 19/11/2020** ✕

Visit	Start	End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Catherine Smith	6:00am	7:00am	■	■	■	■	⚠	✓	✓
Catherine Smith	12:00pm	1:00pm	■	■	■	■	✓	✓	✓
Mary Bass	1:00pm	2:00pm	■	■	■	■	✓	✓	✓

If you see an '!' displayed, this indicates the assignment conflicts with another assignment.

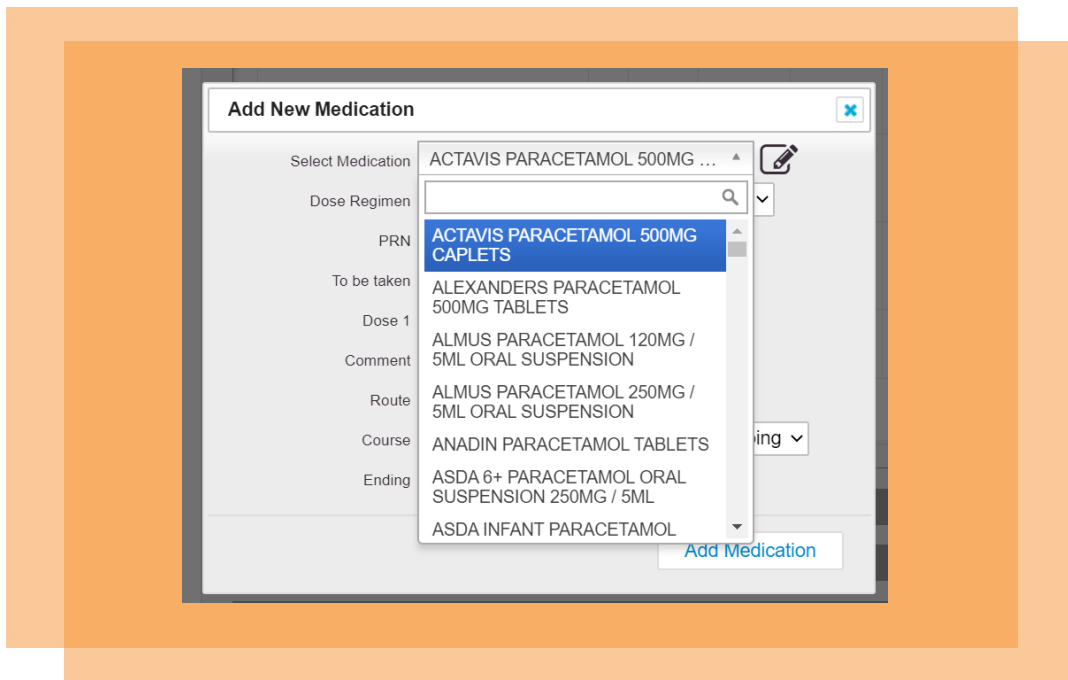
A green tick means that the assignment can be copied, and a green box means that the assignment is already assigned to a round on that particular day.

When you have completed day one, use the date selector to move to the next date and add the visits until your round is complete.

## Adding Medication

You can add medication for your client within their care plan. In the "Care Plan" tab of the client's profile, scroll down to the "Medication" section, and click the "Add Medication" button.

In the pop up which appears, you will need to add the medication details. In the "Select Medication" box, if you start typing in the name of the medication, it will present a drop-down list of all medications which match what you have typed.

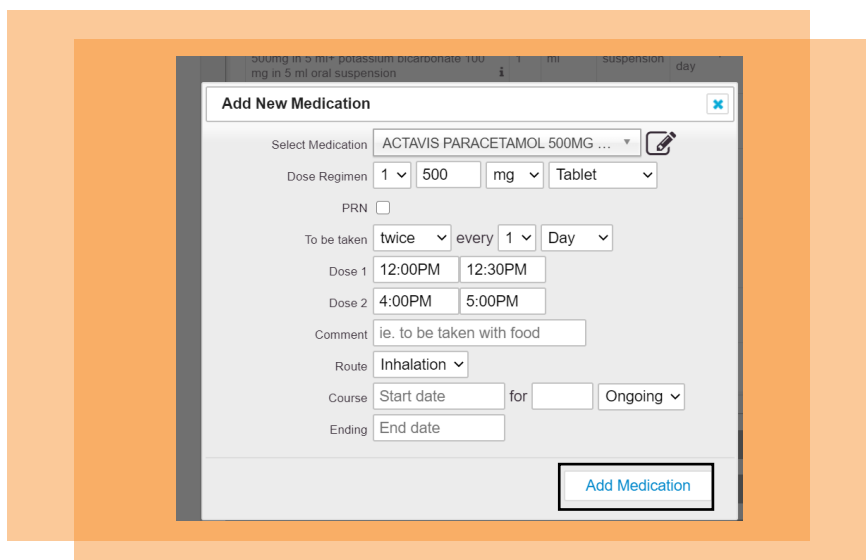


Please note - if you are searching for a medication and it is not appearing, check that:


- you are typing the name correctly

- the name you are entering is the name the medication is known by in the UK

Once you have located the medication, you will need to fill out the rest of the information. If the medication is for a set course, you can **enter this in the "Course" details**. If the medication is one that your client takes on an ongoing basis, you will still need to **enter a start day so that it appears in the system but set the duration as "Ongoing"**. You can also set dose times if you want medication to be given throughout the day: for example, 2 times a day.



When you are happy with the medication details, click **"Add Medication"** to save it to the client's care plan. Should you need to **edit the details** you would click the pen symbol to the right of the line:

PARACETAMOL 500MG TABLET	1	500mg	tablet	4 times per day	yes	500-1000mg Take every 4-6 hours when required	oral	09/07/2020	ongoing	
--------------------------	---	-------	--------	-----------------	-----	--	------	------------	---------	---

When a medication has been added to the care plan, it will then be logged on the MAR tab of the client's profile, both on the desktop and CareFor Carer App.

You can change the week you wish to view the MAR chart for **by clicking in the "Week Commencing" box**. You can also print out the MAR charts should you wish.

You can update the MAR chart **by clicking into the box which corresponds with the day and time the medication was administered**. This will then present you with a box allowing you to add further details.

On the desktop site, you will be able to **select the time that the medication was administered on the MAR tab**.

When you **have clicked "OK"**, the detail you added will be logged on the MAR chart.



## Viewing Current and Expired Medication

You are able to view all current and expired medications within a client's profile. Locate their profile and **click the "Care Plan" tab**. Scroll down **and click "Medication"**, here you should see a **"Current"** and **"Expired"** tab.

Current:

Medication (Click to hide)

Current | Expired


Medication Name	Dose Regimen						Route	Course		
	Qty	Dosage	Form	Frequency	PRN	Comment		Start	End	
ACTAVIS PARACETAMOL 500MG CAPLETS 	1	500mg	tablet	twice per day	no		oral	22/10/2020	ongoing	

[+ Add Medication](#)

Expired:

Medication (Click to hide)

Current | Expired

Medication Name	Dose Regimen						Route	Course		
	Qty	Dosage	Form	Frequency	PRN	Comment		Start	End	
AMOXICILLIN 125 MG / 5 ML ORAL SUSPENSION	1	5ml	suspension	twice per day	no		oral	01/05/2020	Fri/May/2020	

## Viewing Medication on the List View

Viewing whether medication has been allocated to a call is now visible at a glance on the list view. This is represented by the icon underneath "Meds". The colour of this will change depending on if this is recorded or not.

Medication briefcase highlighted in orange means that medication has been assigned to the visit however not yet given:



<input type="checkbox"/> 2331	7:00am - 8:00am	1hr	Jack Barton	Personal Care Morning	Client Home	connor worth	<input type="checkbox"/>		
-------------------------------	-----------------	-----	-------------	-----------------------	-------------	--------------	--------------------------	---	---

Medication briefcase highlighted in green means that medication has been given on time:



<input type="checkbox"/> 2334	3:02pm - 3:30pm	28mins	Jane Doe	Personal Care Lunch	Client Home	Jasmine Parr	<input type="checkbox"/>		
-------------------------------	-----------------	--------	----------	---------------------	-------------	--------------	--------------------------	---	---

Medication briefcase highlighted in red means that more medication may have been recorded than what was scheduled (possible overdose):



<input type="checkbox"/> 2341	3:11pm - 3:12pm	1min	Dave Lincoln	Personal Care Evening	Client Home	Jasmine Parr	<input type="checkbox"/>		
-------------------------------	-----------------	------	--------------	-----------------------	-------------	--------------	--------------------------	---	---

Clicking the briefcase icon will direct you to the "Medication" tab within the booking.

Here you are able to see details regarding planned, scheduled and PRN medication.

Clicking the medication will display details of whether or not it has been administered and by who.

The MAR chart will enable you to record PRN medication safely and colour codes to determine the status of medication ie: administered or scheduled. Other information such as the action, quantity administered and by who is also readily available to view.

### Scheduled Medication

Description	Administration Times		Staff
	Earliest	Latest	
🔒 PENICILLIN TABLETS 250MG	16/11/2020 11:00am	16/11/2020 4:00pm	Jasmine Parr

### As Required PRN Medication

Description
🔒 CLOPIDOGREL 75 MG FILM-COATED TABLETS

### Administered Medication

**PENICILLIN TABLETS 250MG**  
2 x 250mg tablets to be taken twice per day (oral)

#### Administration Details

**Jasmine Parr**

Date & Time: 16/11/2020 15:03

Action: Administered

Quantity: 2

[edit](#)

If the medication is highlighted in green this means that the scheduled medication has been given.

<b>Penicillin Tablets 250mg</b> 2 x 250mg tablets to be taken twice per day (oral) <b>Course: ongoing</b>	<b>Breakfast</b>	2356 ⌚ 6:00am - 10:00am <input type="button" value="Action"/> <input type="button" value="Qty"/> <input type="button" value="Staff"/>	TBC	TBC	TBC	TBC	TBC	TBC
	<b>Lunch</b>	<input type="button" value="Action"/> <input type="button" value="Qty"/> <input type="button" value="Staff"/>	TBC	TBC	TBC	TBC	TBC	TBC
	<b>Tea</b>	2334 ⌚ 3:03pm <input type="button" value="A"/> <input type="button" value="2"/> <input type="button" value="JP"/>						

If the medication is highlighted in red this means that there is a possible overdose.

Medication	Period	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		16th Nov	17th Nov	18th Nov	19th Nov	20th Nov	21st Nov	22nd Nov
<b>PRN</b> <b>Clopidogrel 75 Mg Film-coated Tablets</b> 1 tablet to be taken up to once per prn (oral) <b>Course: ongoing</b>	<b>Tea</b>	2340 ⌚ 3:07pm ⚠️ Possible over medication! <input type="button" value="A"/> <input type="button" value="3"/> <input type="button" value="JP"/>						



## Planned Medication Report

The Planned Medication report can be found underneath the “Functions” menu and going to the “Plan” tab. You can use this report as an extra check for confidence that all medication which can be allocated has been allocated.

Client	Medication	Qty	Comment	Earliest Time	Latest Time	Allocated ID	Possible Bookings	Possible Regular Bookings
Barton, Jack	ACTAVIS PARACETAMOL 500MG CAPLETS	1		00:00	13:00	2,331	4	4
Barton, Jack	ACTAVIS PARACETAMOL 500MG CAPLETS	1		17:00	18:00	2,346	0	1
Bass, Mary	NALOREX 50MG FILM-COATED TABLETS	2		07:00	11:00	2,332	9	9
Bass, Mary	NALOREX 50MG FILM-COATED TABLETS	2		16:00	18:00	2,351	0	1
Coetsee, Leigh	ACTAVIS PARACETAMOL 500MG CAPLETS	1		09:00	10:00		0	0
Doe, Jane	PENICILLIN TABLETS 250MG	2		11:00	16:00	2,334	1	1
Doe, Jane	PENICILLIN TABLETS 250MG	2		06:00	10:00	2,356	1	1
Lincoln, Dave	PENICILLIN TABLETS 250MG	2		12:00	16:00	2,349	0	0
Lincoln, Dave	PENICILLIN TABLETS 250MG	2		18:00	22:00	2,341	1	1
Smith, Catherine	CLOPIDOGREL 75 MG FILM-COATED TABLETS	1		00:00	23:59	2,335	9	9

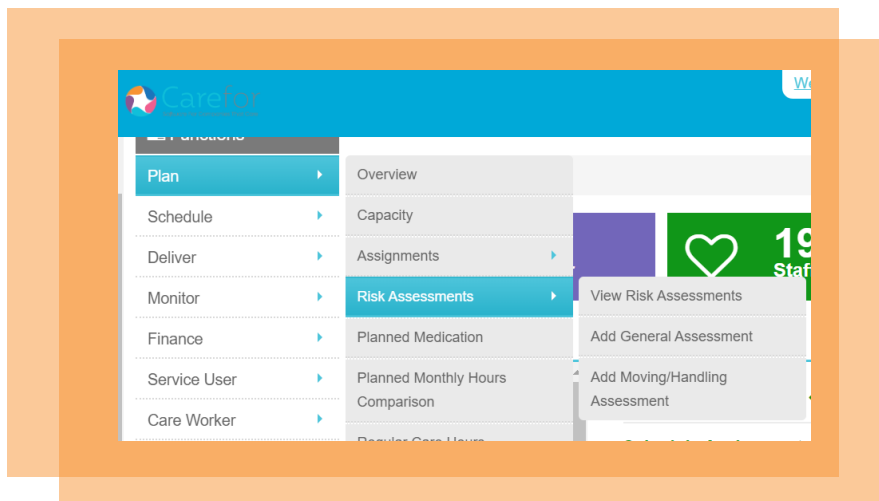
The report will list all current medication. The Allocated ID gives the visit the medication has been allocated to. If the Allocated ID is empty, the “Possible Bookings” column will tell you whether there is a scheduled booking to which this medication should have been allocated. The “Possible Regular Bookings” column will tell you whether the service user has a regular booking which should have been scheduled.

If both the “Possible Bookings” and “Possible Regular Bookings” columns are at 0, there are no bookings in CareFor to which medication could have been allocated.

Please ensure you also check the medication comment as this report does not currently filter out weekly medications on days that they are not take.

## Risk Assessments

Within CareFor, there are two standard risk assessments available - General and Moving and Handling:



The General Assessment is a template which allows you to log various items to build your risk assessment. Once selected, you will be asked to fill out details to create the form:

A screenshot of the 'General Assessment' form in the CareFor system. The form is divided into several sections. At the top, there are fields for 'Assessment No' (containing '7'), 'Client', 'Location', 'Assessor', 'Sign off by', 'Sign off date', and 'Review date'. Below this is a large text area for 'Brief Outline of work/activity'. The main part of the form is a table with the following columns: 'Hazards Identified', 'Who might be at risk?', 'Existing Controls', 'Likelihood 1-5', 'Severity 1-5', 'Risk Rating 1-25', 'Additional control measures required', 'Action By', 'Date Actioned', and 'Residual Risk'. The table contains six rows of data, each with a hazard description, a risk rating of 0, and an 'Action By' dropdown menu. A blue chat icon is visible in the bottom right corner of the form.

The risk assessment number is auto generated, however if you have previously used risk assessments you are able to overwrite this number. Once you have added all details, you will need to click "Create Risk Assessment".

Dashboard / Risk Assessments / General Assessment

Equipment	n/a	5	1	1	n/a	Richard Bedford	19/11/2020	1
Pets	n/a	6	1	1	n/a	Claire Sillito	19/11/2020	1
Wandering/Absconding	n/a	7	1	1	n/a	Susan Smith	19/11/2020	1
Alcohol/Drug/Substance Abuse/Misuse	n/a	8	1	1	n/a	connor worth	19/11/2020	1
Vulnerable Adult	n/a	9	1	1	n/a	connor worth	19/11/2020	1
Infection controls	n/a	10	1	1	n/a	connor worth	19/11/2020	1

Add Additional Row +

**KEY**

Likelihood	Consequence	Outcome
------------	-------------	---------

Create Risk Assessment ✓

You are then able to add multiple rows which cover all the hazards identified. Under each row to the right-hand side there is a button to "Add Additional Rows". The key found at the bottom of the page shows you how to add the likelihood and severity for each line. This then automatically calculates the risk rating.

You will also see that prior to sign off, you are still able to edit the initial details of the risk assessment. Please note that once the risk assessment has been signed off these details can no longer be edited.

If all necessary detail has been added, then the risk assessment can be submitted for sign off:

Hazards Identified	Who might be at risk?	Existing Controls	Likelihood 1-5	Severity 1-5	Risk Rating 1-25	Additional control measures required	Action By	Date Actioned	Residual Risk
Lots of wires at the bottom of the stairs	Service user	not in place	3	3	9	use a cable cover	Gaz Ali	29/07/2020	

Add Additional Row +

View Locations

KEY Location

Update Risk Assessment ↻

Request Sign Off ✓

The person responsible for actioning the control measures can then add the dates the action was complete and then calculate the residual risk and click "Request Sign Off" to complete the risk assessment.

The Moving and Handling assessment also needs the first section filling out with details of the client and who the assessment was carried out by:

Moving/Handling Assessment		Client	Print
Assessment No	13	James Brown	
Brief Outline of work/activity	This assessment is about the Client's mobility status, including ability to weight bear. Other relevant factors include pain, disability, spasm, fatigue or general tendency to fall. Also take in to account problems with comprehension and co-operational behaviour.	Location	Client Home
Assessor	connor worth	Sign off by	connor worth
Review date		Sign off date	
Does the Client have full mobility, and are they fully capable of all daily tasks without the need for assistance?		<input type="radio"/> Yes <input checked="" type="radio"/> No	

You will notice that the last entry in the first section states "Does the Service User have full mobility, and are they fully capable of all daily tasks without the need for assistance?" - if you answer yes to this then the second section of the assessment will disappear and you are able to create the risk assessment and submit the form for sign off.

If no has been selected as the answer to the last question, you will be able to fill out the pre-populated boxes which are shown:

Task	Is assistance required?	How is assistance given?	Is this adequate?	If no, describe the recommended method, or aid which represents the safest and most appropriate control	Care workers required
Walking/Use of stairs	No		No		
Sitting	No		No		
Standing	No		No		
Going to the toilet	No		No		
Bathing/showering	No		No		
Into bed	No		No		
Out of bed	No		No		
Transfer to chair	No		No		

Once completed, the assessment can be submitted for sign off.

## Viewing and Renewing Risk Assessments

From the Plan tab, choose "Risk Assessments" and then "View Risk Assessments." All your risk assessments will be visible:

Type	Assessment No	Client	Location	Outline	Date Completed	Review Date
General	4	Jack Barton		Initial risk assessment of client home		
General	6	Jack Barton		Test risk assessment		
General	7	Jack Barton		test assessment		19/11/2021
General	2	Mary Bass		Monthly risk assessment		15/06/2020
General	1	Mary Bass		Initial Risk Assessment of Mary Bass' home	10/04/2019	10/10/2019
General	5	Jane Doe		Test ra	22/05/2020	
General	3	Catherine Smith		General Risk Assessment for Catherine Smith		

Any risk assessment which is highlighted green is in date, and any highlighted red have expired.

You can also view individual risk assessments from within the "Care Plan" tab of the client profile.

<input type="checkbox"/>	Assessment No.	Type	Service User	Location	Outline	Review Date	Date Completed
<input type="checkbox"/>	12	General	James Brown	Service User Home	Mary and carers	20/11/2021	20/11/2020
<input type="checkbox"/>	11	General	James Brown	Service User Home	test	09/10/2020	20/11/2020

Once you add a new risk assessment to replace an expired one, you will always be able to find the link.

The example below shows an expired risk assessment, you will see next to the Review Date there is an arrow:

General Risk Assessment							Print		
Assessment No	2		Client	Kevin Adams					
Brief Outline of work/activity	Initial Risk Assessment		Location	Client Home					
			Assessor	Nigel Groves					
			Sign off by	Claire Sillito					
			Sign off date	23/05/2017					
			Review date	23/05/2018 					
Hazards Identified	Who might be at risk?	Existing Controls	Likelihood 1-5	Severity 1-5	Risk Rating 1-25	Additional control measures required	Action By	Date Actioned	Residual Risk
Microwave plug is frayed	All users	None	4	5	20	Replace microwave	Claire Sillito		

Clicking the arrow takes you to the risk assessment which has been added to replace the out of date one.

**General Risk Assessment** Print

Assessment No	3	Client	Kevin Adams
Brief Outline of work/activity	Annual RA	Location	Client Home
		Assessor	Howell Hughes
		Sign off by	Claire Sillito
		Sign off date	29/05/2018
		Review date	29/05/2019

Hazards Identified	Who might be at risk?	Existing Controls	Likelihood 1-5	Severity 1-5	Risk Rating 1-25	Additional control measures required	Action By	Date Actioned	Residual Risk
No hazards identified at this time			-	-	0				

**History**

ID	Outline	Date Completed	Review Date
73	Initial Risk Assessment	23/05/2017	23/05/2018

KEY

The new risk assessment shows the history of any previous assessment carried out.

## How to Email/Add Attachments to Notes

You can 'mass email' carers or staff using the bulk action menu within the all staff or all carers list. Firstly, locate the list who you want to send the message to, and select using the left-hand tick boxes who is to receive the message, then, drop down the 'Bulk Action' menu and select 'Send Email'.

Dashboard / All Office Staff

Active Office Staff In-Active Office Staff

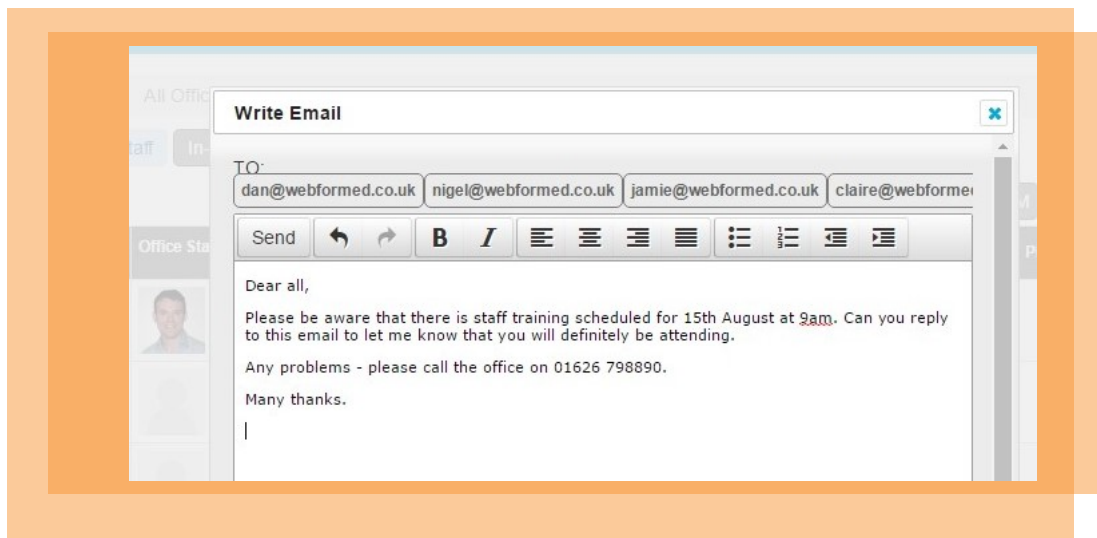
Bulk Action: Go

<input checked="" type="checkbox"/>	Office Staff ID	Office Staff Name	All Regions	All Teams	Access	PIN	Typ
<input checked="" type="checkbox"/>	002	Dan Farrell-Wright			Full Access		Ac
<input checked="" type="checkbox"/>	023	Armando Gonzalez			Full Access		Ac
<input type="checkbox"/>		Nigel Groves					Administrator

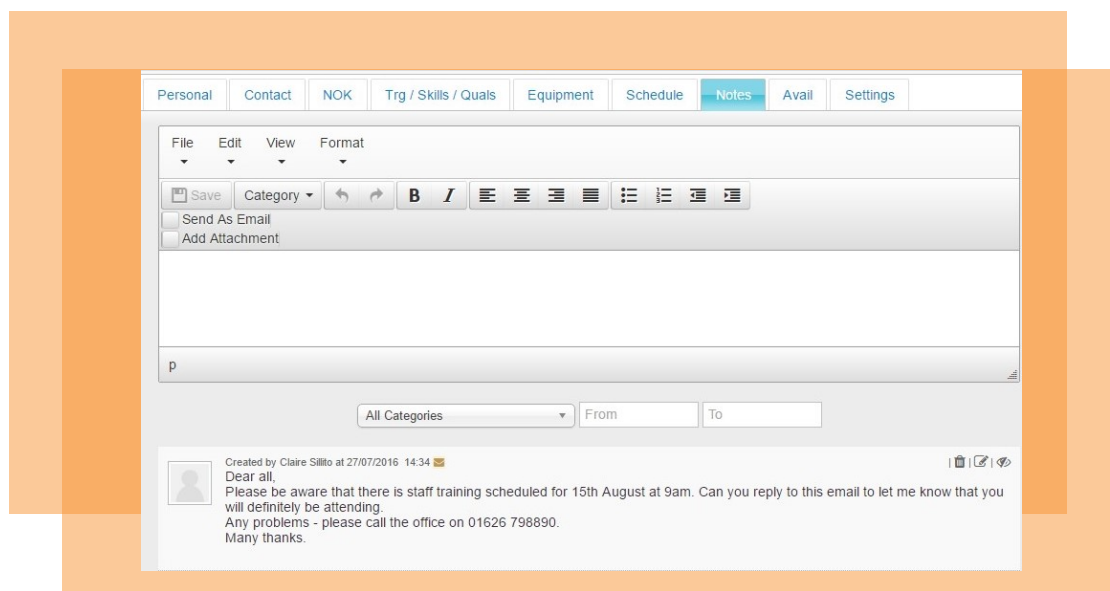
- Send Email
- Update User Information
- Print Office Staff
- Reset Selected Passwords
- Generate ID Card
- Contact Office Staff
- Send Email
- Rota
- Email Rota
- Print Rota

This will then bring up a box allowing you to type the message that you wish to send.

Once you have finished the message, click the "Send" button:



The email will then be sent to the individual's email address. You can also see under the notes section of the staff or carer's profile which emails have been sent to them:



## Using the Client Staff and Notes Report

For any selected date range, you can generate a report of notes left on staff profiles. (Please note this applies to all staff including support workers, carers, assessors etc.) The report can be run based on a note category and/or an individual's name. You can find the note report within the reports section.

Dashboard / Reports / Staff Notes Report

Start: 2020-10-01  
End: 2020-10-31  
category: All  
staff: All  
Run report

Staff Notes Report

Created	Note	Category	Staff	Team	Author
01/10/2020 09:11:18 AM	Dear Jasmine Parr, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached. Thanks		Jasmine Parr		Claire Sillito
01/10/2020 01:44:12 PM	Dear Jasmine Parr, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached. Thanks		Jasmine Parr		Claire Sillito
01/10/2020 09:11:20 AM	Dear Claire Sillito, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached. Thanks		Claire Sillito		Claire Sillito
01/10/2020 01:44:16 PM	Dear Claire Sillito, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached. Thanks		Claire Sillito		Claire Sillito



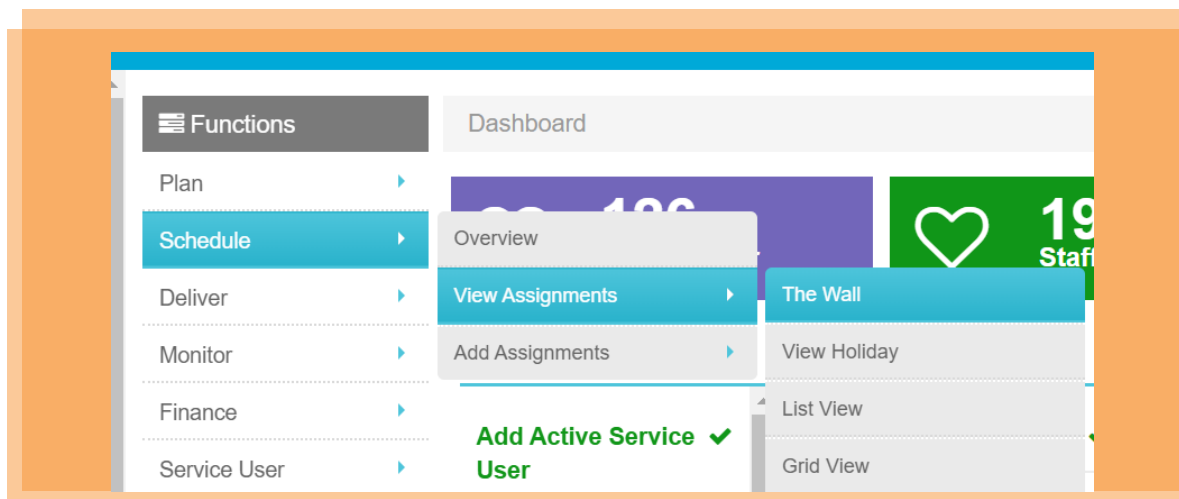


# Schedule

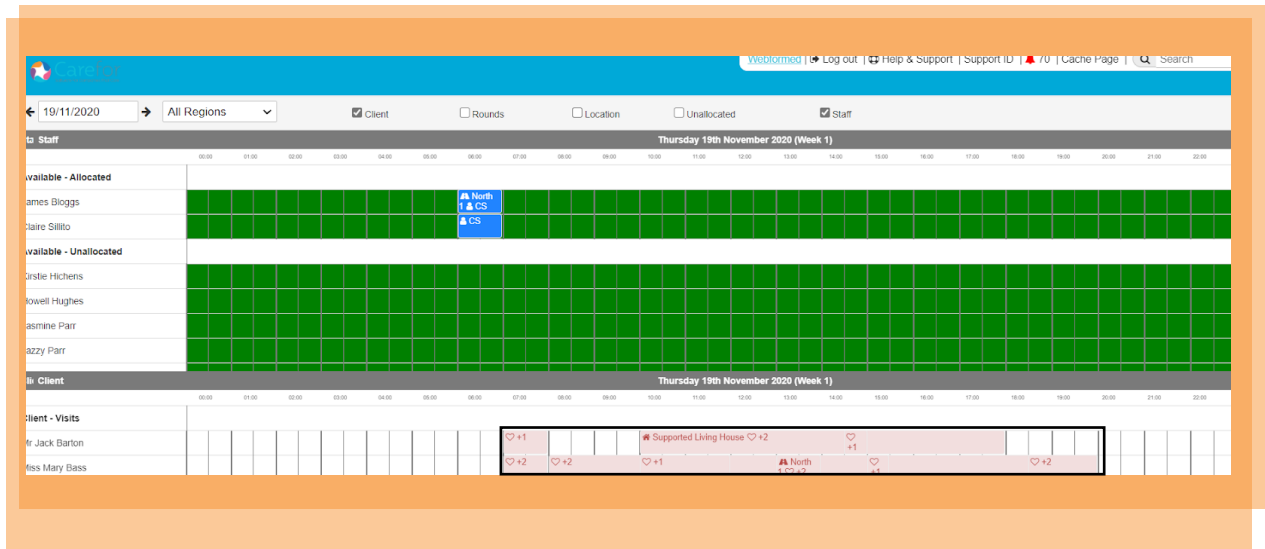
CareFor provides three different options for building your rota. These are 'The Wall', 'The Grid View' and the 'The List View'. Here we'll take you through how to use each one, starting with 'The Wall'.

## The Wall

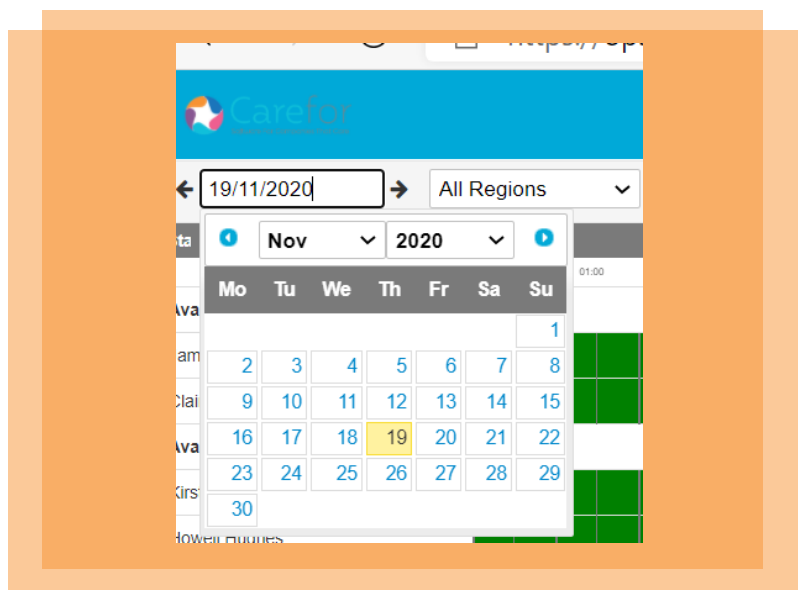
To begin creating your rota, you first need to locate 'The Wall' which is found under the "Functions" menu. Go to "Schedule", "View Visits" and select "The Wall".



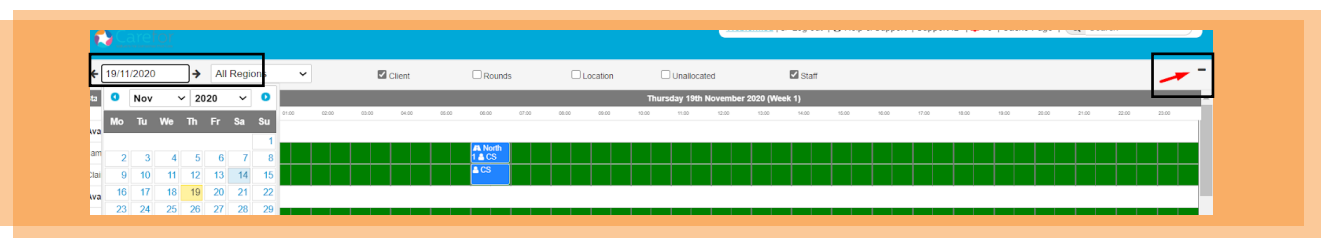
Once you have clicked the wall view you require, you will be taken to "The Wall". (Please note, all unallocated assignments show up shaded pink, any that are already allocated will have the assignment type colour allocated to them:



Once you are in your selected wall view, you can then choose which date you want to use to begin building your rota. To do this, click the box which contains the current date to bring up the calendar:



If you work in regions, you can also filter your view by individual regions. You can also change your view from one day to two (or more) by using the minus symbol to the right of the screen:



This will then compact the days. You can press the minus button to zoom out more.

Clicking the plus symbol will take you back.

To begin allocating assignments to staff and carers, you will need to make sure that the "Staff" and "Client" boxes to the right of the date and region fields are ticked. Please note, that in order for an assignment to be allocated to a carer they must be showing as available to work.

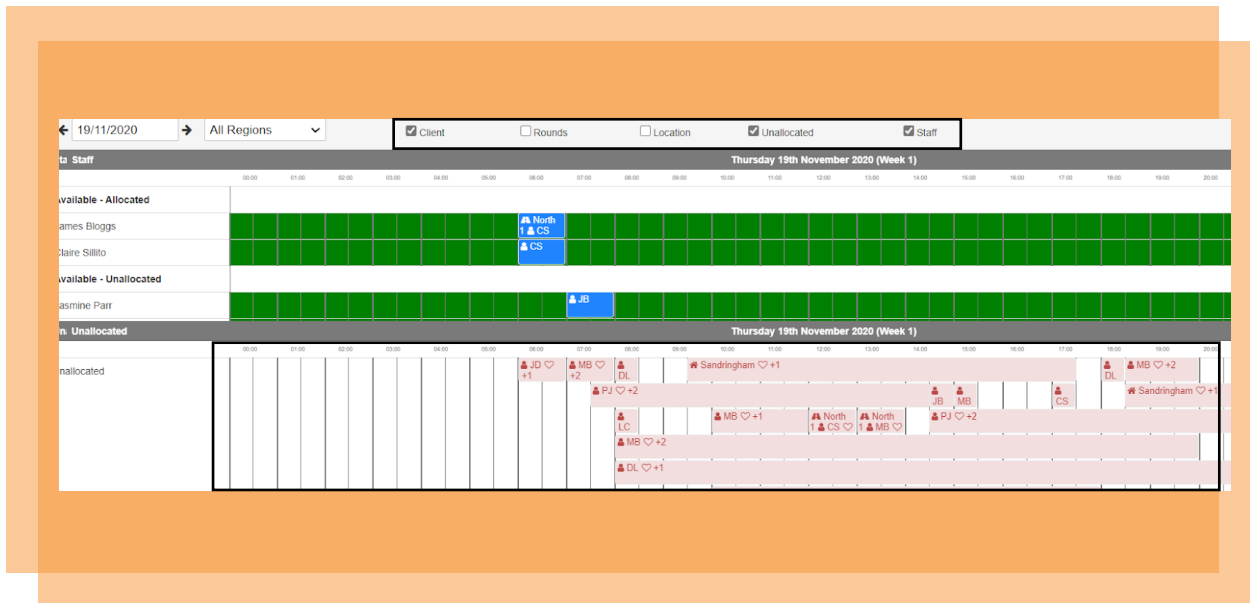
The screenshot displays a software interface for managing staff and client assignments. On the left, a list of staff members is shown under the heading "Available - Unallocated": Kirstie Hichens, Howell Hughes, Jasmine Parr, Jazzy Parr, Luke Riley, and Josh Rowan. The main area is a grid with a time axis at the bottom ranging from 00:00 to 19:00. The grid is mostly green, indicating availability. Below the grid, a "Client - Visits" section shows assignments for Mr Jack Barton and Miss Mary Bass. Mr Jack Barton has a visit at 07:00 (+1) and another at 14:00 (+1). Miss Mary Bass has visits at 07:00 (+2), 08:00 (+2), 10:00 (+1), 13:00 (North 1 +2), 14:00 (+1), and 18:00 (+2). A blue highlight is visible on the grid at approximately 06:00.

To allocate an assignment to a carer you will need to click the assignment located on the client's line. When you click the Assignment once, it will highlight in blue:

This is a close-up view of the "Client - Visits" section. It shows a row for "Mr Jack Barton" with a grid of time slots. One cell, representing a visit at 07:00, is highlighted in blue and contains a red heart icon followed by "+1".

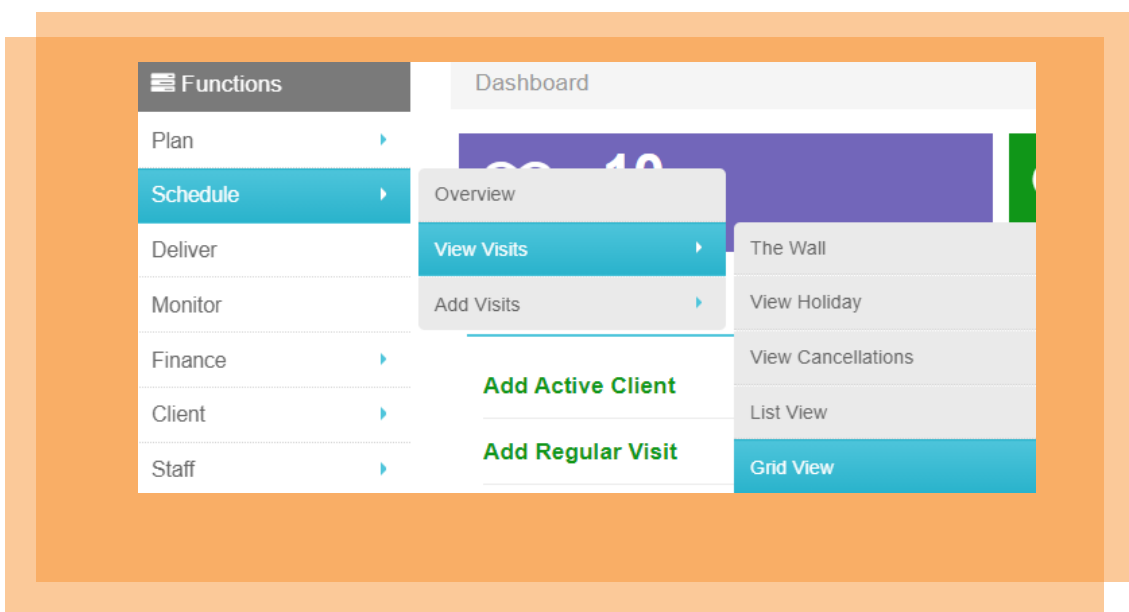
As with allocating a single assignment, you then click into the green area of the carer you wish to allocate the assignments too.

It is advisable, once you have completed your rota, to filter using the tick boxes and include the "Unallocated" option. This will bring up any visits which have no carer allocated to them and ensure that all assignments are filled:

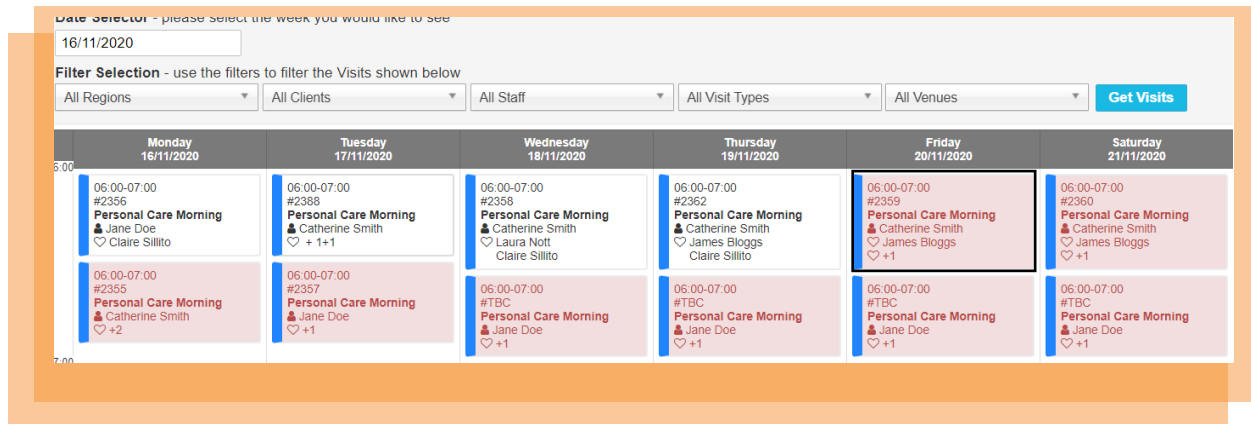


## The Grid View

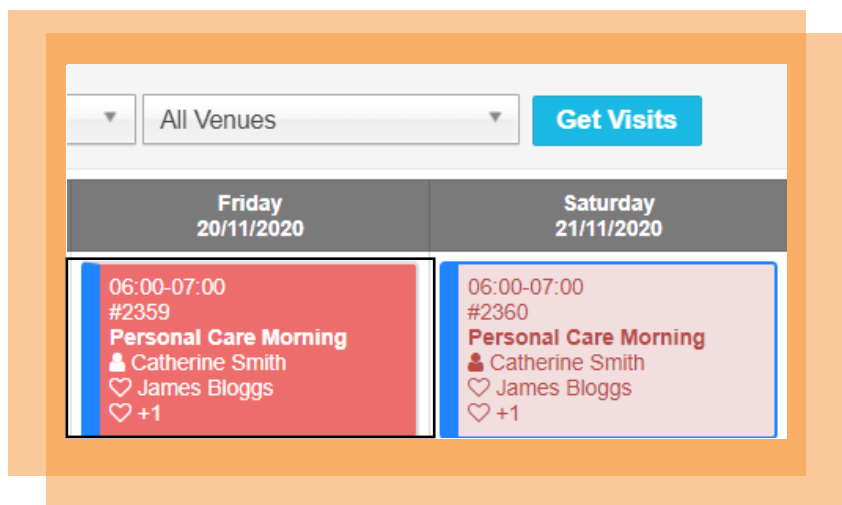
The Grid view is found by going to the "Schedule" tab and going to "View Visits" under the "Functions" menu:



The Grid is always presented as a week, and you can change the week that you view using the "Date Selector". In the Grid view, any visit which shows up shaded pink is unallocated. The colours shown to the left of each visit relate to their visit type:



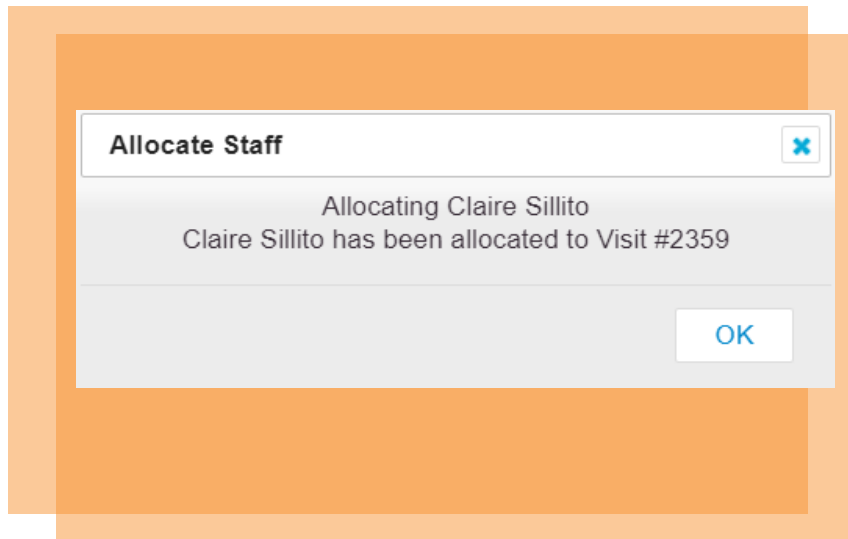
To allocate visits to a carer you need to click each visit once which will change the colour:



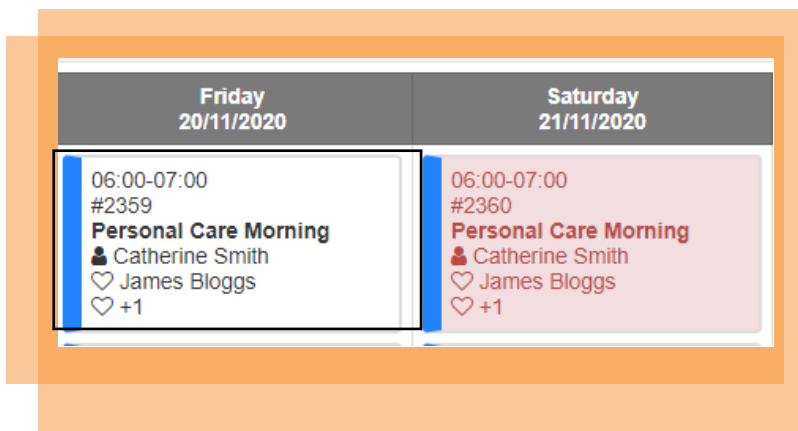
When you have selected all the visits you wish to allocate, click one of the visits again and you will be presented with a pop up which allows you to "Delete Assignments" or "Allocate Staff".

If you click the 'Allocate Staff' option, based on staff availability and any other mandatory criteria for that visit, you will be presented with a list of available carers.

To allocate the visits, select the carer by clicking their name, and this will display the following:



Clicking "OK" will then save your selection and the carer will be allocated to the visits (note they have turned from pink to white):



When building your rota using the "Grid View", you can apply the various filters to make it easier for you. In the example below, the week has been filtered by one client:

	Monday 16/11/2020	Tuesday 17/11/2020	Wednesday 18/11/2020	Thursday 19/11/2020	Friday 20/11/2020	Saturday 21/11/2020	Sunday 22/11/2020
07:00-08:00	#2331 Personal Care Morning ▲ Jack Barton ♡ connor worth	#2387 Personal Care Morning ▲ Jack Barton ♡ +1	#TBC Personal Care Morning ▲ Jack Barton ♡ +1	#2389 Personal Care Morning ▲ Jack Barton ♡ Jasmine Parr	#TBC Personal Care Morning ▲ Jack Barton ♡ +1	#TBC Personal Care Morning ▲ Jack Barton ♡ +1	#TBC Personal Care Morning ▲ Jack Barton ♡ +1
08:00							
09:00							
10:00	#2346 Day Shift ▲ Jack Barton ● Supported Living House	#2376 Day Shift ▲ Jack Barton ● Supported Living House	#TBC Day Shift ▲ Jack Barton ● Supported Living House	#TBC Day Shift ▲ Jack Barton ● Supported Living House	#TBC Day Shift ▲ Jack Barton ● Supported Living House	#TBC Day Shift ▲ Jack Barton ● Supported Living House	#TBC Day Shift ▲ Jack Barton ● Supported Living House

Once you have created your rota for the week, to ensure you do not have any gaps, it is advisable to filter the week by unallocated visits. This option is located within the "All Staff" filter. Click "All Unallocated" and then "Get Visits".

## The List View

To access "The List View" go to the 'Schedule' tab under the "Functions" menu, click "View Visits" and locate "The List View".

The list view allows you to filter your visits by a date range, and also by other criteria, such as regions and clients, to make it easier to build your rota:

Dashboard / Schedule / List View

**Date Selector** - please select the date range you would like to see  
18/11/2020 | 19/11/2020

**Filter Selection** - use the filters to filter the visits shown below

All Regions | All Clients | All Staff | All Visit Types | All Venues | All Rounds | Display

Any Status | **Get Visits**

**Auto Allocate** - Allocate any unallocated visits as set within regular visits section.  
**Auto Allocate**

Scheduled Work: 48 Hours  
Scheduled Care: 46 Hours  
Allocated Work:

Once you have selected the filters you would like to apply, click "Get Visits". In the example below, you can see that a week and a client has been selected:

The screenshot shows a software interface with the following elements:

- Date Selector:** A range from 16/11/2020 to 22/11/2020.
- Filter Selection:** Includes dropdowns for "All Regions", "Mr Dave Lincoln", "All Staff", "All Visit Types", "All Venues", "All Rounds", and "Display".
- Buttons:** "Any Status" and "Get Visits" (highlighted with a red box).
- Auto Allocate:** A section with an "Auto Allocate" button and a description: "Allocate any unallocated visits as set within regular visits section."
- Work Summary:** Shows "Scheduled Work: 50 Hours", "Scheduled Care: 50 Hours", and "Allocated Work: 24 Hours and 30 Minutes - 49.0%".
- Table:** A table with columns: Visit #, Times, Duration, Client, Visit Type, Location, Round, Staff, Meds, Trav. It lists visits for Monday 16/11/2020 and Tuesday 17/11/2020.

For the example shown above, it is possible to allocate all the filtered visits to one carer. To do this you would click the small square above where it says 'Visit #' in the header box:

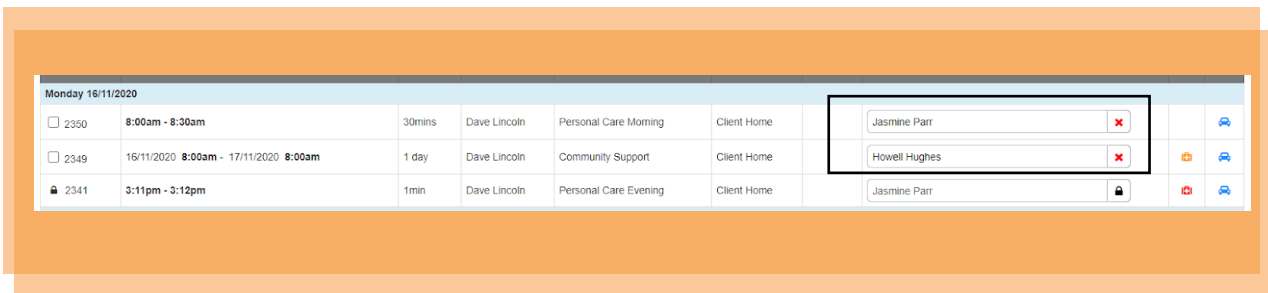
This screenshot shows the bulk selection interface:

- Showing 1 - 21 of 21**
- Message Box:** "All 21 visits selected. [Clear Selection?](#)"
- Buttons:** "Allocate Staff", "Bulk Action", and "Go" (highlighted with a red box).
- Table:** The table header is visible with a checkmark in the "Visit #" column.



Putting multiple ticks in the 'Assignment #' column will present an "Allocate Staff" option above the table, click "Go" and CareFor will find available members of staff to fulfill the selected visits.

To allocate the visits to the carer, click their name and then click "OK". This will then return you to the List view, where you can see the carer is now allocated to the visits:



If you have added a carer to a visit in error, you can remove them using the red 'X':



You can also use the magnifying glass option to allocate carers to visits. The magnifying glass is found to the right of a visit if there is no carer allocated to it. Simply click the magnifying glass, and you will be presented with a list of available carers who can fulfill that visit.



Staff	Distance (miles)	Recent Visits	Journey time	Daily Hours
James Bloggs	0.76	-	05:05	0:0
Josh Rowan	1.00	-	06:06	0:0
Connor Worth	0.91	-	04:04	1:0

The pop-up displays useful information which can assist you in allocating. This is as follows:

- the distance (in miles) the carer is from the client
- how many recent visits the carer has carried out for the client
- how long it will take the carer to get there
- amount of daily and weekly hours (if you have inputted target hours within the carer profile, you will be shown how many hours out of their target weekly hours they have completed)

When you have chosen the carer you wish to fulfill the visit, **click their name** to allocate to them.

## Using Rounds – Allocating Staff to Round

Rounds are allocated to carers on the "List View". Access the "List View" from the "Functions menu", and then choose the date range you wish to allocate.

Dashboard / Schedule / List View

Filter Selection - use the filters to filter the visits shown below

All Regions All Clients All Staff All Visit Types All Venues North 1 Display

Any Status **Get Visits**

Auto Allocate - Allocate any unallocated visits as set within regular visits section. **Auto Allocate**

Scheduled Work: 21 Hours  
Scheduled Care: 20 Hours  
Allocated Work:

Once you have set the date range, from the rounds drop down, choose which round you would like to allocate and click "Get Visits".

Showing 1 - 39 of 39

Allocated Work:  12 Hours - 30.8%

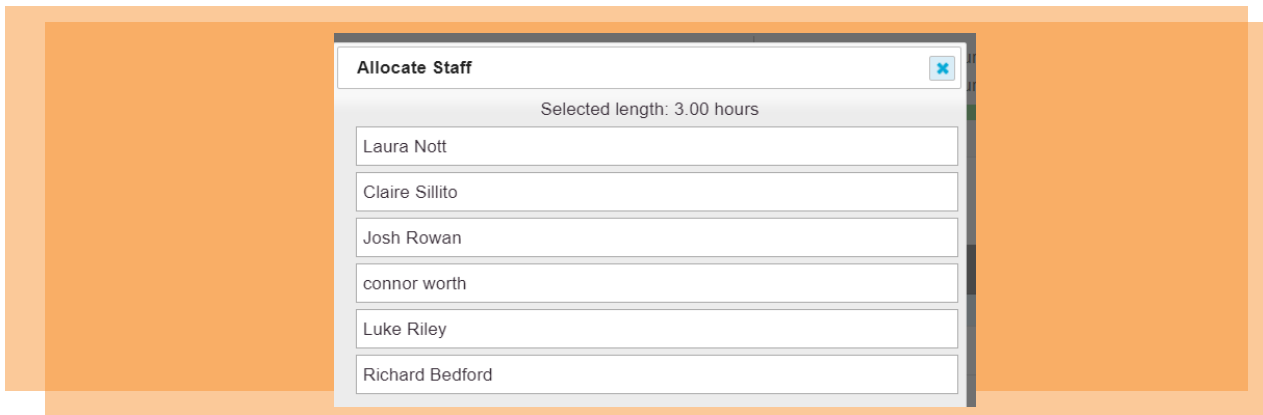
Visit #	Times	Duration	Client	Visit Type	Location	Round	Staff	Meds	Trav
Monday 02/11/2020									
<input type="checkbox"/> 2405	6:00am - 7:00am	1hr	Catherine Smith	Personal Care Morning	Client Home	North 1	Select staff		
<input type="checkbox"/> 2406	12:00pm - 1:00pm	1hr	Catherine Smith	Personal Care Lunch	Client Home	North 1	Select staff		

Placing a tick in the box next to the day will bring up the allocate staff option – clicking "Go" will run through all available staff.

Allocate Staff Bulk Action **Go**

Visit #	Times	Duration	Client	Visit Type	Location	Round	Staff	Meds	Trav
Monday 02/11/2020									
<input checked="" type="checkbox"/> 2405	6:00am - 7:00am	1hr	Catherine Smith	Personal Care Morning	Client Home	North 1	Select staff		
<input checked="" type="checkbox"/> 2406	12:00pm - 1:00pm	1hr	Catherine Smith	Personal Care Lunch	Client Home	North 1	Select staff		
<input checked="" type="checkbox"/> 2407	1:00pm - 2:00pm	1hr	Mary Bass	Personal Care Lunch	Client Home	North 1	Select staff		
Tuesday 03/11/2020									

When the pop-up displays, you can select the carer's name that you want to allocate the round to. Click "OK" to confirm the action and the visits will be allocated to the carer.



Complete the action repeatedly to fill your rota for the week.

## Auto Allocate/Copy Function

Within the "List View", you also have further options found within the "Auto Allocate" button. The "Auto Allocate" button is found just under the filter selection:

**Date Selector** - please select the date range you would like to see  
29/07/2020 31/07/2020

**Filter Selection** - use the filters to filter the assignments shown below

All Regions All Service Users All Unallocated All Assignment Types All Venues

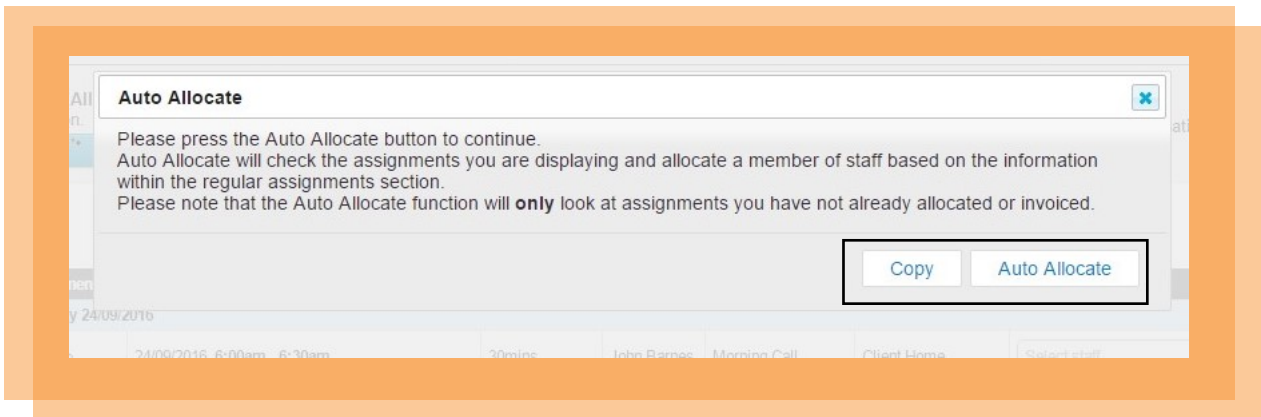
All Rounds Display Any Status **Get Assignments**

**Auto Allocate** - Allocate any unallocated assignments as set within regular assignments section

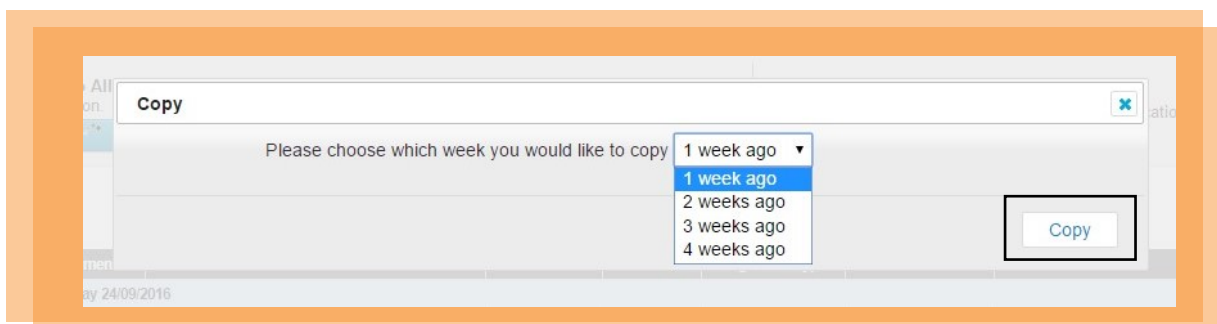
**Auto Allocate**

**Scheduled Work:** 24 Hours and 30 Minutes  
**Scheduled Care:** 23 Hours and 30 Minutes  
**Allocated Work:**

The "Auto Allocate" screen provides two options, "Copy" and "Auto Allocate":



The "Copy" function allows you to copy a previously created rota to the current week. You can copy a rota from up to four weeks ago. We advise you to copy your rota over day by day. Clicking the "Copy" button allows you to choose when you want to copy from:



Once you have chosen your day, click "Copy" and CareFor will copy the information across. You will be asked to confirm that you are happy and once you have confirmed, the copy is complete. You will need to complete this for each day in turn.

"Auto Allocate" looks at the information on the regular visits and availability. To view which staff member is assigned Monday, for example **double click on Monday** and select the assign staff button:

**Schedule**

MON	TUE	WED	THU	FRI	SAT	SUN
✓	✓	✓	✓	✓	✓	✓

**Thursday Week 1** - Select the regular staff for Kenneth Barker on Thursday

Select the first staff:

Select the second staff:

Add Week [+]

**Close**

As with the "Copy" option, you will be asked to check that you are happy with the rota before clicking "Confirm".

If "no staff found" is showing for visits once auto allocation is run, this means that no regular staff have been added to that care plan, or they are unavailable.

Please note: Once you have completed your weekly rota, it is always beneficial to double check all slots have been filled. The easiest way to do this is to filter by "Unallocated Visits". This option is found in the "All Staff" dropdown:

**Date Selector** - please select the date range you would like to see  
 10/02/2019 | 16/02/2019

**Filter Selection** - use the filters to filter the assignments shown below

All Regions | All Service Users | **All Unallocated** | All Assignment Types | All Venues | All Rounds | Display | Any Status | **Get Assignments**

**Auto Allocate** - Allocate any unallocated assignments section. **Scheduled Work:** 1 Hours  
**Scheduled Care:** 1 Hours  
**Allocated Work:** \_\_\_\_\_

**Auto Allocate**

All Staff  
 All Allocated  
**All Unallocated**

## Amending Visits – Unlocking Calls

Locate the booking you need to unlock and click the visit number to open the call.

2400	2:43pm - 2:43pm	1min	Jane Doe	Personal Care Lunch	Client Home	Jasmine Parr
------	-----------------	------	----------	---------------------	-------------	--------------

Once you have clicked through to the booking form, you will need to click the "Schedule" tab to unlock the call.

Info	Form	Schedule	Medication							
Mrs Jane Doe		Visit:	Personal Care Lunch							
		Visit Date:	19/11/2020							
Staff	Start	End	Charge	Pay	Expenses			Total Cost	Total Charge	
					Travel	Food	Misc			
Jasmine Parr	19/11/2020 2:43pm	19/11/2020 2:43pm	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	✓
<b>Totals</b>								£ 0.00	£ 0.00	

On the right-hand side of each reconciled row, you will see a green tick. Clicking the tick will unlock that row and allow you to make changes to the call.

Info	Form	Schedule	Medication							
Mrs Jane Doe		Visit:	Personal Care Lunch							
		Visit Date:	19/11/2020							
Staff	Start	End	Charge	Pay	Expenses			Total Cost	Total Charge	
					Travel	Food	Misc			
Jasmine Parr	19/11/2020 2:43pm	19/11/2020 2:43pm	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	✓
<b>Totals</b>								£ 0.00	£ 0.00	

Once you have made the changes, click the thumb up icon and you will then reconcile the call again.

Info Form Schedule Medication													
Mrs Jane Doe					Visit: Personal Care Lunch				Visit Date: 19/11/2020				
Staff	Start		End		Charge	Pay	Expenses			Total Cost	Total Charge		
							Travel	Food	Misc				
Jasmine Parr	19/11/2020	2:43pm	19/11/2020	2:43pm	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	£ 0.00	
<b>Totals</b>										£ 0.00	£ 0.00		

## Updating Visits

When you come to update a client's care plan, there are some points you need to note:

- if you need to change the number of carers associated with a regular visit/service, you will need to **give the current visit an end date**, then start a new visit to allow you to alter the number of carers. You can add an end date to a regular visit by **double clicking** on the visit within the client's profile.

**Edit Visit - Mary Bass**

Visit Type: Personal Care Morning

Location: Client Home

Visit Time: 7:00am - 8:00am

Earliest Start Time: 6:50am

Latest Start Time: 7:10am

Service Start Date: 01/04/2018

Service End Date:

Visit Frequency: Weekly

No Carers: 2

Funder: Self Funding

Funding Contribution:

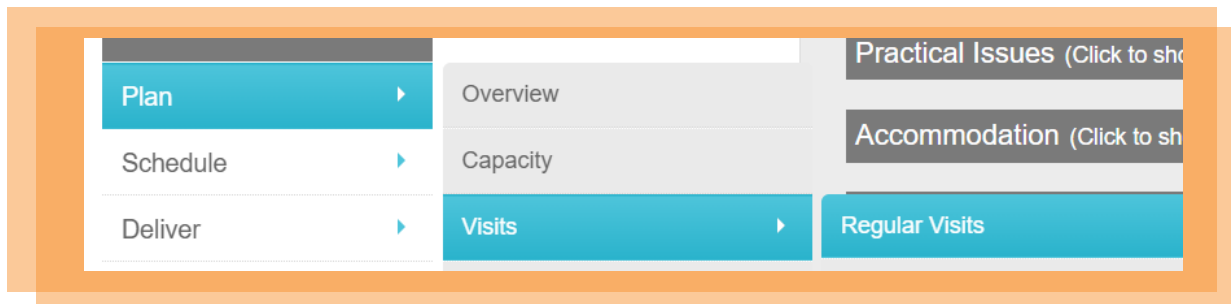
Contract Reference:

**Schedule**

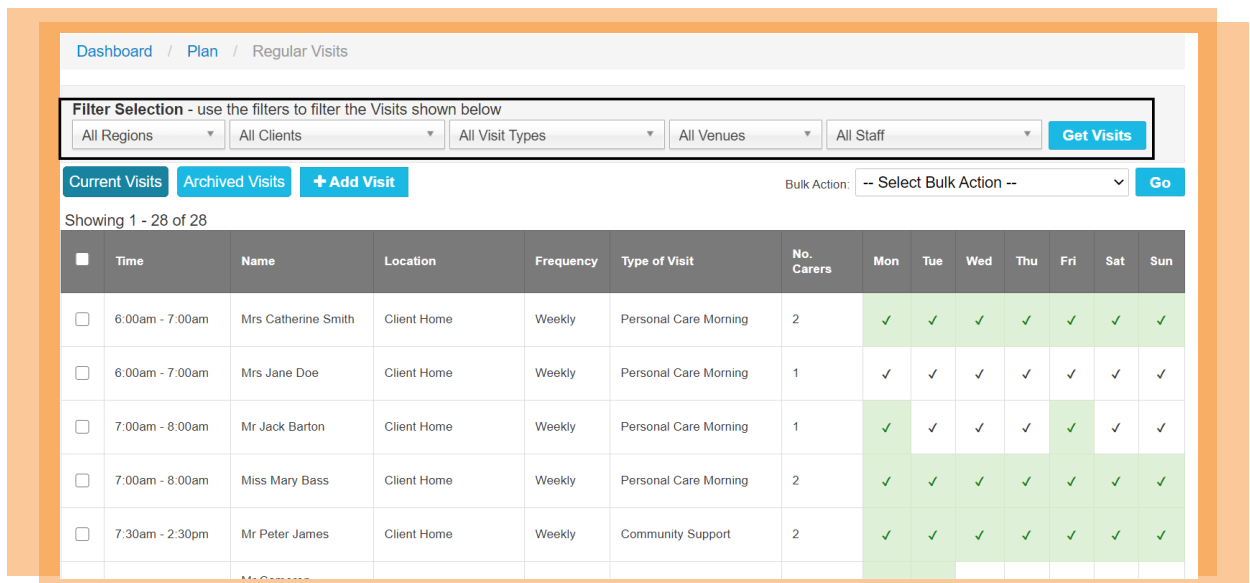
MON	TUE	WED	THU	FRI	SAT	SUN
✓	✓	✓	✓	✓	✓	✓

You also have another option to view current regular visits. You can find this by going to "Plan-Visits-Regular Visits".

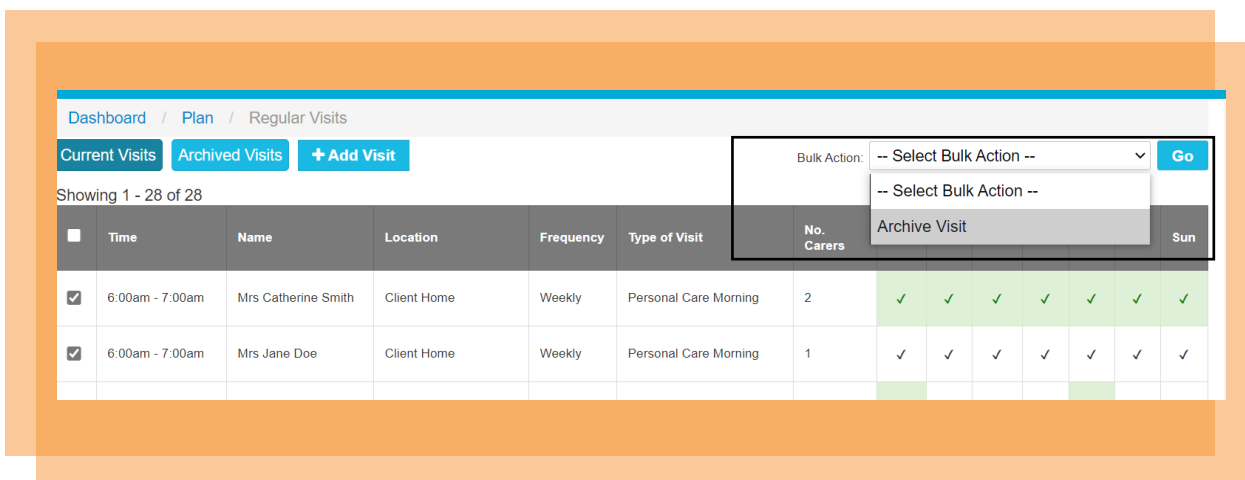




In this section you can filter by a client's name or visit type. You also have the option to view current regular visits and archived visits.



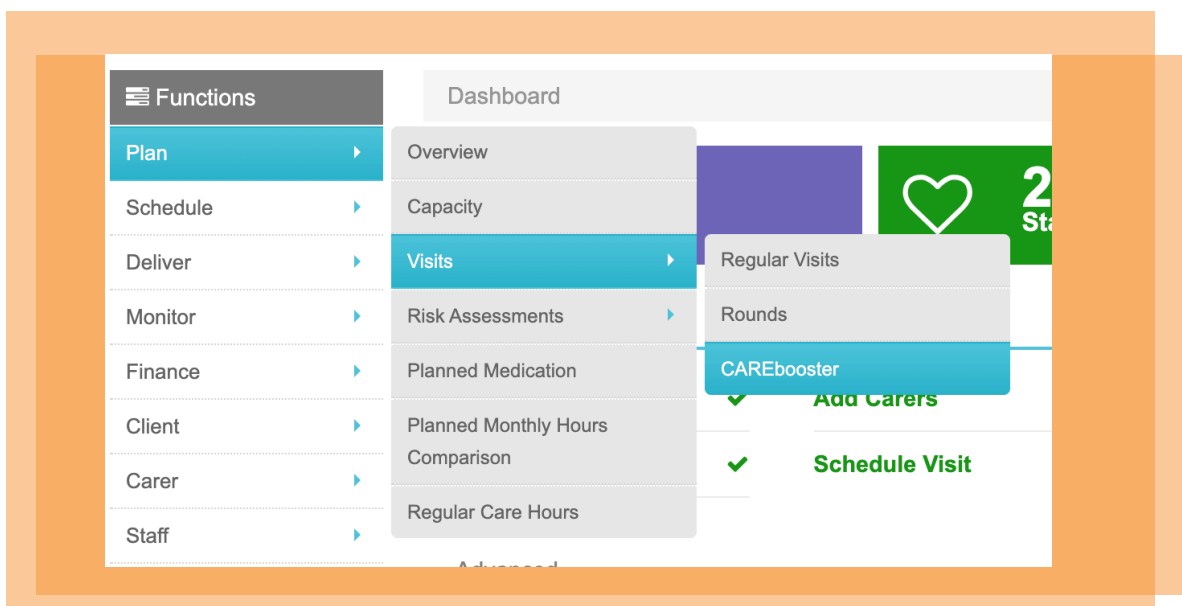
If you like to archive multiple visits, you can select the tick box next to the visits and then select the bulk action menu and select "Archive Visit".



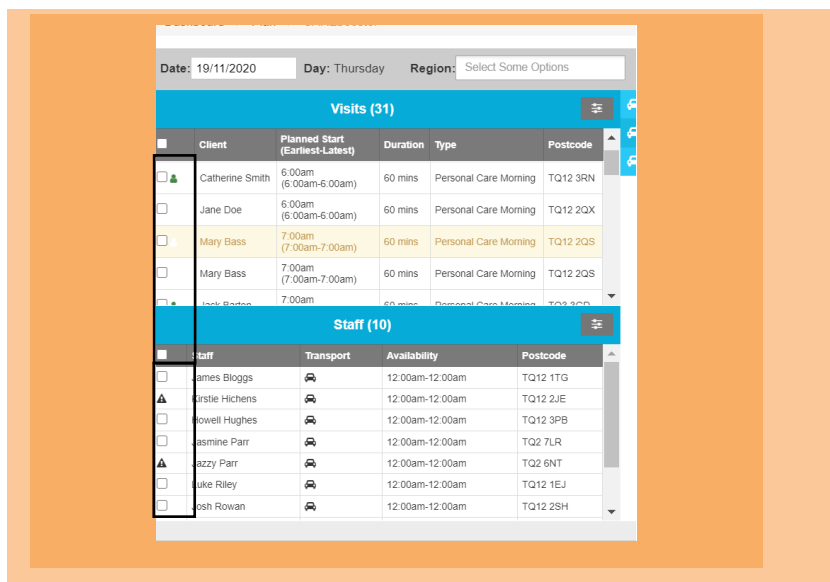
If you access the "Application Log" tab under the "Reports" menu, you will be able to see a log of any changes to bookings, along with the user who made these changes.

## CAREBooster

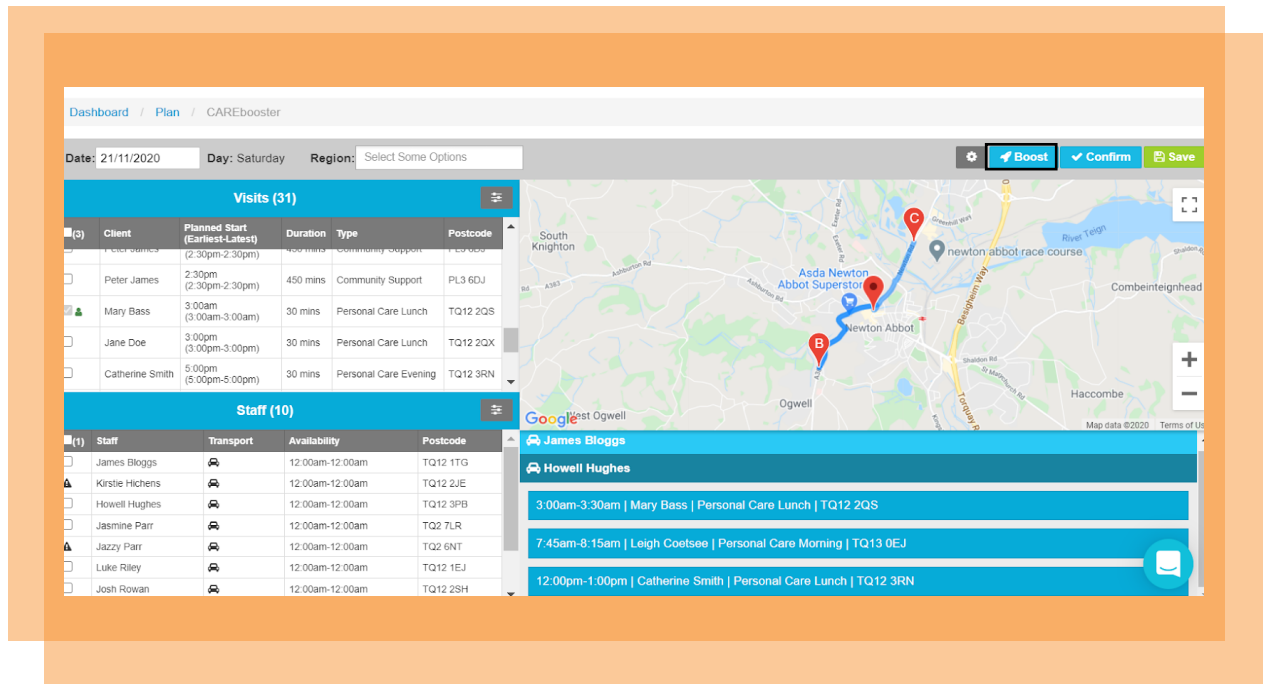
From the "Functions" menu go to "Plan", then "Visits" and select "CAREBooster". Now select the date you'd like to create a route for.



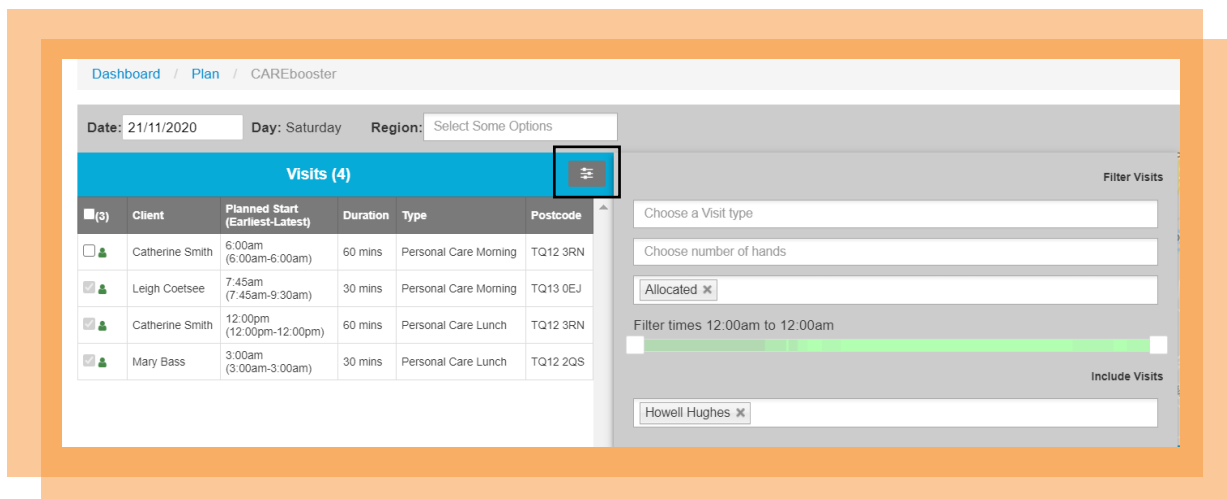
On the left hand-side select both the visits and the staff members you'd like to allocate the visits to.



Once selected click **"Boost"** and CAREBooster will then create the most efficient and time saving route for your staff members.



Once created, you should then be able to see the planned journey for your selected staff and the allocated visits. Clicking and using the filter button functionality next to the visits gives you the option of filtering by visit times, visit types, whether a call is allocated, and the number of hands needed for a visit.



When you have finished planning all your routes, click **confirm** and CAREBooster will have efficiently allocated your visits to staff members for that day.

## Filling Gaps with CAREBooster

You can now use CAREBooster to fill any gaps between your carer's visits, meaning more care can be sufficiently delivered. Here you can see Claire has a free 4-and-a-half-hour window before her 6.30pm call is due to start. Let's see if we can allocate more visits to Claire.

The screenshot shows the CAREBooster dashboard for Monday, 06/04/2020. It displays a list of 29 visits and 10 staff members. The visits table includes columns for Client, Planned Start (Earliest-Latest), Duration, Type, and Postcode. The staff table includes columns for Staff, Transport, Availability, and Postcode. A map on the right shows the location of the visits, and a list of staff members is shown below the map, including their names and distances from the location.

Client	Planned Start (Earliest-Latest)	Duration	Type	Postcode
Mary Bass	3:00am (3:00am-3:00am)	30 mins	Personal Care - Lunch	TQ12 2QS
Jane Doe	6:00am (6:00am-6:00am)	60 mins	Personal Care - Morning	TQ12 2QX
Catherine Smith	6:00am (6:00am-6:00am)	60 mins	Personal Care - Morning	TQ12 3RN
Catherine Smith	6:00am (6:00am-6:00am)	60 mins	Personal Care - Morning	TQ12 3RN
Mary Bass	7:00am (7:00am-7:00am)	60 mins	Personal Care - Morning	TQ12 2QS
Mary Bass	7:00am (7:00am-7:00am)	60 mins	Personal Care - Morning	TQ12 2QS

Staff	Transport	Availability	Postcode
Laura Nott	Car	12:00am-12:00am	TQ12 3QH
Jasmine Parr	Car	12:00am-12:00am	TQ2 7LR
James Bloggs	Car	12:00am-12:00am	TQ12 1TG
Claire Sillito	Car	12:00am-12:00am	TQ12 3AF
Josh Rowan	Car	12:00am-12:00am	TQ12 2SH
connor worth	Car	12:00am-12:00am	TQ12 3AF

To do this, you will firstly have to select the visit rows that are already allocated to Claire, and lock these calls:

The screenshot shows the 'Edit Visit' dialog box. It contains the following information:

- Client: Jane Doe
- Staff: Claire Sillito (locked)
- Visit Type: Personal Care - Morning
- Earliest Start: 6:00am
- Latest Start: 6:00am
- Duration: 60 (mins)

Buttons: Delete Visit, Update this Visit

The allocated visits should now show in orange. This ensures that CAREBooster does not remove Claire from these visits (although the visits can be moved in time). Now use the filters to try and fit in the gaps, here we have filtered by single handed calls which are currently unallocated to Claire.

The screenshot shows the CAREBooster interface with the following components:

- Header:** Dashboard / Plan / CAREbooster. Date: 06/04/2020, Day: Monday, Region: Select Some Options. A Boost button is visible in the top right.
- Visits (11) Table:**

Client	Planned Start (Earliest-Latest)	Duration	Type	Postcode
Jane Doe	8:00am (6:00am-6:00am)	60 mins	Personal Care - Morning	TQ12 2QX
Justin Bell	8:00am (8:00am-8:00am)	30 mins	Personal Care - Morning	TQ12 2QS
	9:30am (9:30am-9:30am)	480 mins	Early Shift	SA16YH
	12:15pm (12:15pm-12:15pm)	10 mins	Community Support	TQ12 2RB
Mary Bass	1:00pm (1:00pm-1:00pm)	60 mins	Personal Care - Lunch	TQ12 2QS
Jack Barton	2:30pm (2:30pm-2:30pm)	30 mins	Personal Care - Lunch	TQ33GD
- Filter Visits Panel:**
  - Choose a Visit type: Single Handed (selected), Not Allocated.
  - Filter times: 12:00am to 12:00am.
  - Include Visits: Claire Sillito (selected).
- Staff (10) Table:**

Staff	Transport	Availability	Postcode
Laura Nott	🚗	12:00am-12:00am	TQ12 3QH
Jasmine Parr	🚗	12:00am-12:00am	TQ2 7LR
James Bloggs	🚗	12:00am-12:00am	TQ12 1TG
Claire Sillito	🚗	12:00am-12:00am	TQ12 3AF
Josh Rowan	🚗	12:00am-12:00am	TQ12 2SH
connor worth	🚗	12:00am-12:00am	TQ12 3AF
- Allocation Summary:**
  - 6:00am-7:00am | Jane Doe | Personal Care - Morning | TQ12 2QX
  - 1:00pm-2:00pm | Mary Bass | Personal Care - Lunch | TQ12 2QS
  - 6:30pm-8:00pm | Mary Bass | Personal Care - Evening | TQ12 2QS
  - Josh Rowan: 0.00 miles
  - connor worth: 8.81 miles
  - Luke Riley: 8.81 miles
  - Richard Bedford: 0.00 miles
  - Howell Hughes: 0.00 miles

Now select all the visits and Claire, set the options and click Boost.

This screenshot shows the same interface as the previous one, but with the following changes:

- Visits Table:** All 11 visits are now selected, indicated by blue checkmarks in the first column.
- Staff Table:** Claire Sillito is now selected, indicated by a blue checkmark in the first column.
- Filter Visits Panel:** The 'Boost' button in the top right corner is now highlighted with a red box.

CAREBooster has now allocated a further two visits to Claire.

Dashboard / Plan / CAREbooster

Date: 06/04/2020 Day: Monday Region: Select Some Options Boost Confirm Save

### Visits (11)

Client	Planned Start (Earliest-Latest)	Duration	Type	Postcode
Jane Doe	6:00am (6:00am-6:00am)	60 mins	Personal Care - Morning	TQ12 2QX
Justin Bell	8:00am (8:00am-8:00am)	30 mins	Personal Care - Morning	TQ12 2QS
	9:30am (9:30am-9:30am)	480 mins	Early Shift	SA16YH
	12:15pm (12:15pm-12:15pm)	10 mins	Community Support	TQ12 2RB
Mary Bass	1:00pm (1:00pm-1:00pm)	60 mins	Personal Care - Lunch	TQ12 2QS
Jack Barton	2:30pm (2:30pm-2:30pm)	30 mins	Personal Care - Lunch	TQ33GD

### Staff (10)

Staff	Transport	Availability	Postcode
Laura Nott	🚗	12:00am-12:00am	TQ12 3QH
Jasmine Parr	🚗	12:00am-12:00am	TQ2 7LR
James Bloggs	🚗	12:00am-12:00am	TQ12 1TG
Claire Sillito	🚗	12:00am-12:00am	TQ12 3AF
Josh Rowan	🚗	12:00am-12:00am	TQ12 2SH
connor worth	🚗	12:00am-12:00am	TQ12 3AF

🚗 Laura Nott	0.00 miles
🚗 Jasmine Parr	0.00 miles
🚗 James Bloggs	0.00 miles
🚗 Claire Sillito	20.36 miles

6:00am-7:00am   Jane Doe   Personal Care - Morning   TQ12 2QX
1:00pm-2:00pm   Mary Bass   Personal Care - Lunch   TQ12 2QS
2:30pm-3:00pm   Jack Barton   Personal Care - Lunch   TQ33GD
5:00pm-5:30pm   Jane Doe   Personal Care - Evening   TQ12 2QX
6:30pm-8:00pm   Mary Bass   Personal Care - Evening   TQ12 2QS

## Adding Holiday

To add holiday for your carers, firstly click "Carer", then choose "Add Holiday":

Functions

- Rota
- Patient
- Carer**
- Nurse
- Health Care Assistant
- Therapists

Dashboard

19 Carer

- View Carer
- Add Carer
- Add Holiday**
- Add Sickness

You will need to select the holiday visit type and the start date of the holiday:

The screenshot shows a web form for creating a holiday assignment. The form is titled "Assignment #15090" and includes the following fields:

- Holiday:** A dropdown menu with "Annual Leave" selected.
- Location:** A dropdown menu with "Main Office" selected.
- Start:** A date field with "19/09/2018" and a time field with "7:00am".
- End:** A date selector showing "Jun" and "2018".
- Funder:** A dropdown menu.
- Select Staff:** A text input field.
- Details:** A text input field with "on their schedules" as a placeholder.
- Scheduling Details:** A text input field with "Administrators or" as a placeholder.

Below the form is a green button labeled "Updated Holiday".

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Once you have entered the start date, you will need to enter a start time and an end date and time. You can add annual leave to take place over multiple days by amending the start and end dates.

Once the start and end times have been added, you can then select the staff member to assign to the holiday and the appropriate funder.

If the holiday assignment has been added correctly, the status bar will show at the bottom of the form in green showing "Updated Holiday".

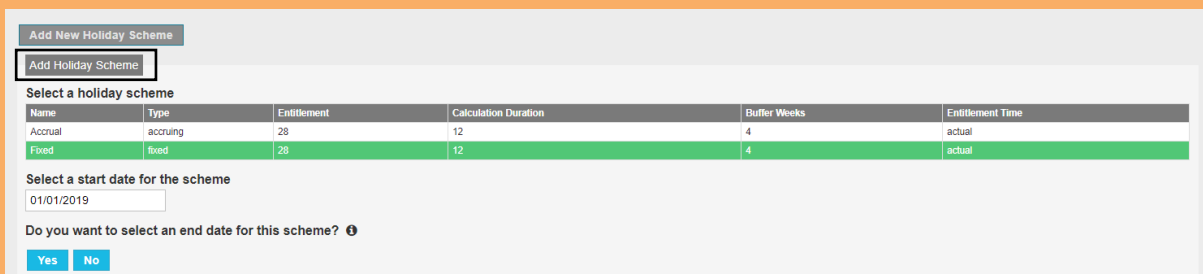
Please note, if a staff member has a holiday scheme set up all days will be counted as full days regardless of the length of holiday taken and holiday will need to be entered for each individual day taken.

# Setting Up A Holiday Scheme

To set up a holiday scheme for staff you will need to go to the **staff members profile** and click into the "Holiday" tab:

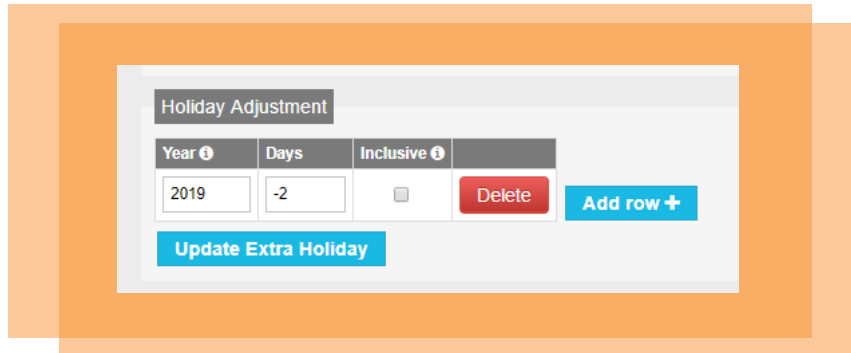


To add a new holiday scheme, select "Add New Holiday Scheme" and select either "Fixed" or "Accrual", then enter a start date for the scheme and if needed an end date. To complete the set-up, click "Add Holiday scheme".





You also have the option to add or remove an amount of days holiday. This will be useful if you are currently part way through your holiday year and are just beginning to use the new "Holiday" feature of CareFor.



The figure in the "Days" box can be a positive or negative amount to allow you to add or take away holiday. The "Inclusive" box will use these days from the current period's holiday allowance.

For a staff member to accrue holiday, visits need to be attended that have "accrued holiday" ticked and those visits need to be reconciled on CareFor and locked within the payroll report.

Within the holiday tab, you can view the staff members daily rate by entering a date and selecting "calculate". Clicking the '?' symbol will show a breakdown of the paid visits that have accrued holiday. This calculation will look back over 52 working weeks.

**All time is in minutes and rounded to the nearest minute. All pay is rounded to the nearest penny.**

Week Start	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Total	
	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time	Pay	Time
01/06/2020	£0.00	66238													£0.00	66238
31/08/2020	£0.00	66238													£0.00	66238
25/05/2020	£79.83	480	£88.18	510											£168.01	990
18/05/2020	£40.51	275	£50.66	255	£48.35	285	£36.49	195	£33.17	210	£66.67	405	£79.83	480	£355.68	2105
11/05/2020	£39.83	210	£35.13	195	£34.52	195	£49.58	255			£79.67	480	£79.83	480	£318.56	1815
04/05/2020			£41.74	225	£53.28	270	£47.96	285	£81.50	480	£78.17	480	£86.67	480	£389.32	2220
27/04/2020	£64.73	330	£49.71	255	£46.32	255	£62.16	435			£70.83	420	£69.50	420	£363.25	2115
20/04/2020	£71.14	240	£68.75	285	£50.47	195	£56.34	210	£31.19	120	£15.89	60	£127.08	675	£420.87	1785
13/04/2020	£63.01	285	£46.97	225	£36.15	195	£58.78	255			£76.50	480	£79.00	480	£360.41	1920
06/04/2020	£102.45	555	£61.65	360	£60.89	315	£52.78	255			£77.83	480	£62.49	270	£418.09	2235
30/03/2020	£74.48	330	£72.50	285	£72.49	315					£158.46	885	£90.96	480	£468.89	2295

## Setting Holiday

Once a holiday scheme has been set within a staff member's profile, it also needs to be configured within the assignment types in CareFor. This can be done using the following steps:

- Go to "Settings" - Assignment Types - click the "edit settings" under the "Functions" menu.
- If a visit accrues holiday, you will need to select "pay", "regular pay" and "accrued holiday".

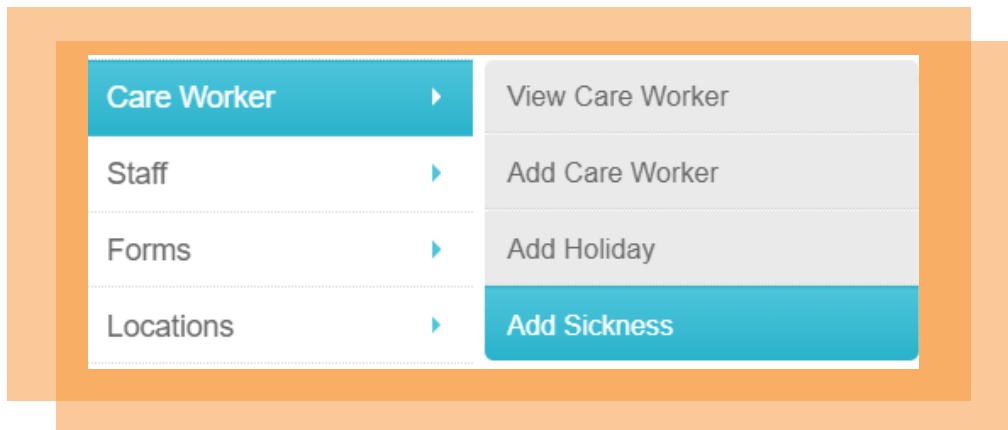
Visit types that accrue holiday will be used in the calculation to work out how many days a staff member has accrued. If you do not want a visit type to accrue holiday these options would need to be unticked.

When you click on the coloured triangle the person running payroll is presented with the below screen which shows how many days requested, the user is then given the option to pay or not to pay:

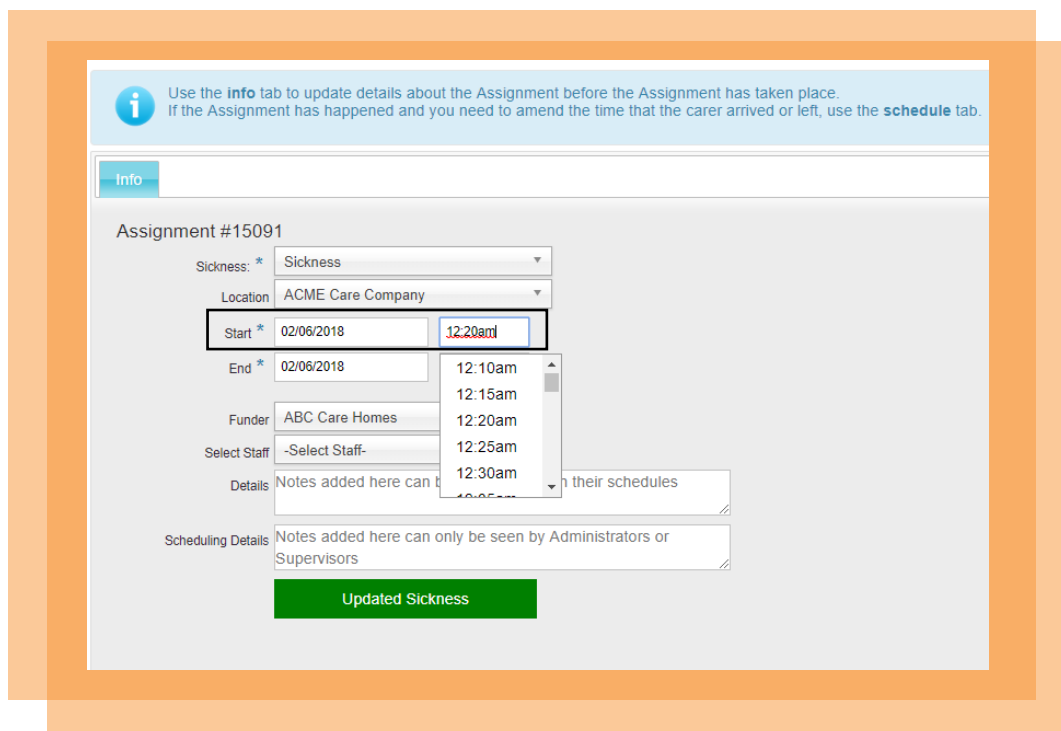
x	x	8:00	£52.21	Support Worker
		9:00	£58.96	

## Adding Sickness

To add sickness to your carers, firstly click 'Carer', then choose 'Add Sickness':



Please note, that CareFor works out sickness in hours, so you will need to log this accordingly. You will need to **enter the start date** of the sickness:



A screenshot of a web form titled 'Assignment #15091'. The form has several fields: 'Sickness' (dropdown menu), 'Location' (dropdown menu), 'Start' (date and time), 'End' (date and time), 'Funder' (dropdown menu), 'Select Staff' (dropdown menu), and 'Details' (text area). The 'Start' field is highlighted with a red box, and its time component '12:20am' is also highlighted. A dropdown menu is open for the 'End' field, showing time options: 12:10am, 12:15am, 12:20am, 12:25am, 12:30am, and 12:35am. Below the form is a green button labeled 'Updated Sickness'. At the top of the form, there is an information icon and text: 'Use the info tab to update details about the Assignment before the Assignment has taken place. If the Assignment has happened and you need to amend the time that the carer arrived or left, use the schedule tab.'

Once you have entered the start date, you will need to **enter a start time**. Then, you will need to **enter the end date and time**. This will then unlock the “Staff Member” drop down, allowing you to choose the member of staff who is off sick.

If you have completed this successfully, you will see the status bar show as “Updated Sickness”.

You can add further details to the sickness within the “Details” and “Scheduling Details” section of the sickness form.

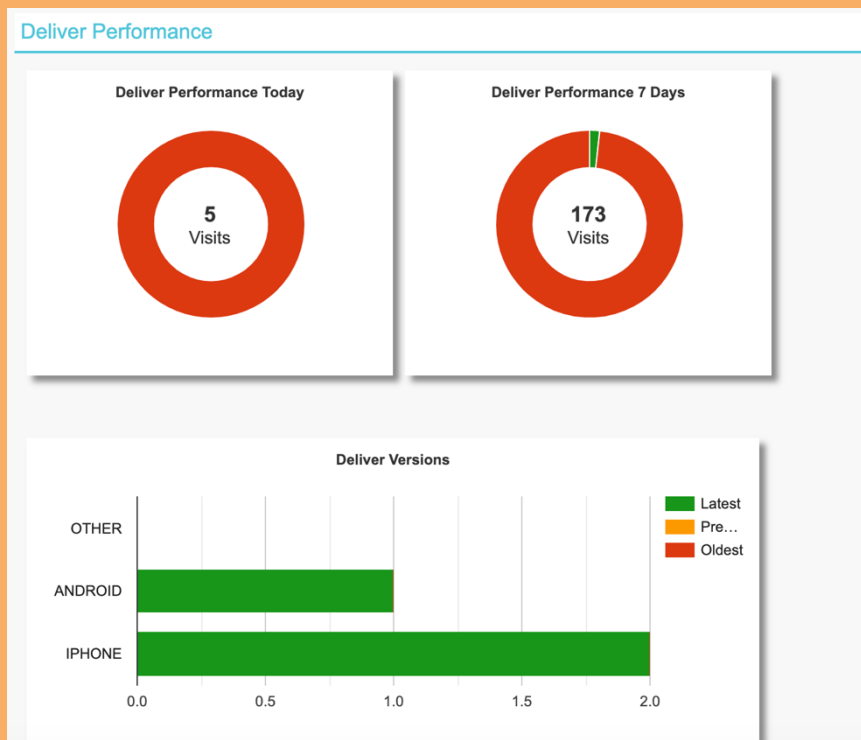


# Deliver

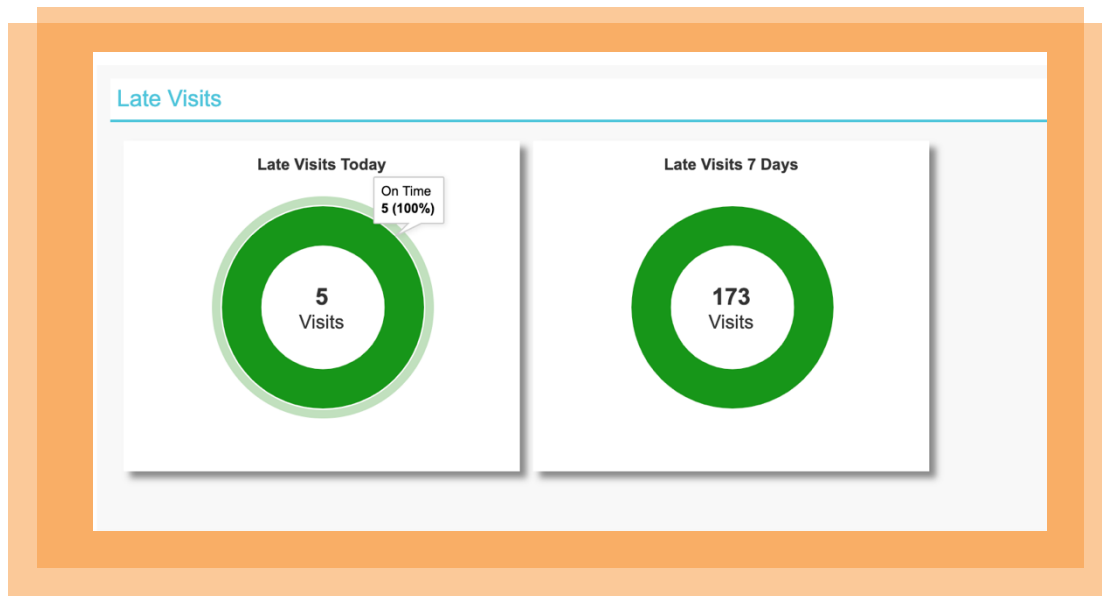
## Overview Screen

You can access the "Deliver Overview" by going to the "Functions" menu, the "Deliver" tab and clicking "Overview".

Here you will be presented with two reports, these will give you real time information on your delivery performance. Focusing on the number of visits fulfilled and late visits that day and week, this makes staying on track of delivery performance more efficient.



The “Deliver versions” report enables you to easily access information regarding the version of the CareFor Carer app your carers are using. Making it simple to ensure they’re always using the most recent version of the app in order to gain optimum benefits.



## CareFor Carer App

Our CareFor Carer app gives your carers all the tools required to deliver exceptional care at the tip of their fingers. Enabling them to check in and out of calls, record medication administration, fill out forms and complete notes. Please see the Carer training pack for an explanation of the app.



# Monitor

## Monitor Overview

The monitor overview retrieves real time information from the CareFor Carer App to enable you to monitor your care delivery and make alterations accordingly.

- If a carer's status is highlighted in red, this either identifies they did not arrive for a visit or that medication administration has been missed.
- If a carer's status is highlighted in yellow, this identifies that they may not have checked in/out of their previous visit, they may be late for a visit or that they have not been active today on the app.
- If a carer's status is highlighted in green, this identifies there are no issues.

The screenshot displays a 'Current Status' section with a grid of carer status cards. Each card includes a carer's photo, name, scheduled time, supervisor, and a status message. The status messages are color-coded: red for 'did not arrive' and yellow for 'late' or 'not active today'. A card for 'Connor Worth' is partially visible at the bottom left, and a card for 'Claire Sillito' is at the bottom left with a green status bar.

Carer Name	Time	Supervisor	Status
Richard Bedford	6:00am	Catherine Smith	Richard did not arrive for this visit
James Bloggs	7:30am	Peter James	James did not arrive for this visit
Laura Nott	6:30pm	Mary Bass	Laura did not check in/out of a previous visit. Laura has not been active today.
Jasmine Parr	2:30pm	Peter James	Jasmine is late for this visit
Luke Riley	6:00am	Catherine Smith	Luke did not arrive for this visit
Josh Rowan	2:30pm	Peter James	Josh is late for this visit
Connor Worth	10:00pm	Peter James	connor did not check in/out of a previous visit. connor has not been active today.
Claire Sillito			Green status bar

**Please note:** Monitor alerts will be different dependent upon the system settings and also the property details for a client. For example, if monitoring is off, no late alert will show.

Within the 'Property' tab of a client's profile, ensure that within the "Monitoring Options" a "Monitoring Type" is selected:

## Checking in and Out Positions Report

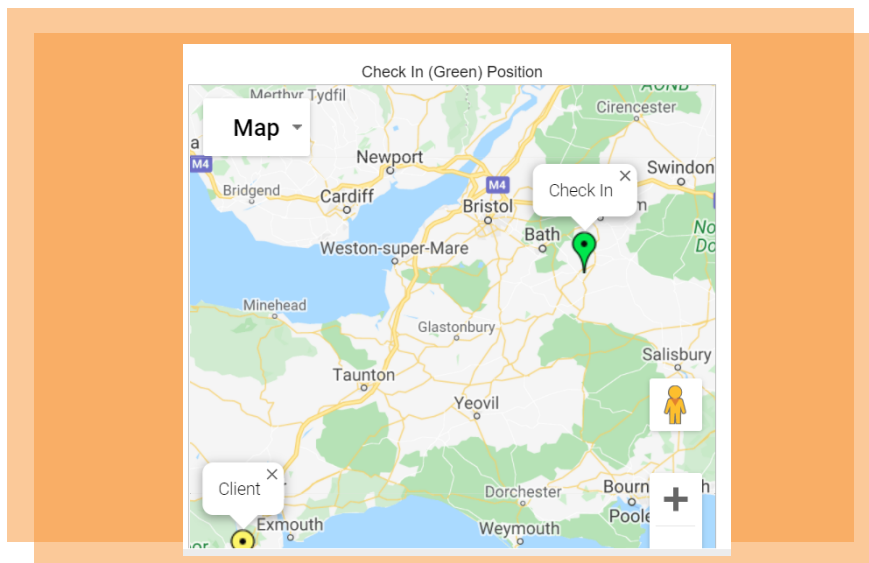
For a specified date range, you are able to see where check in and out has occurred. You can run the report for all staff or just a selected individual. You can also specify a client, and also a radius.

Once the report has been run you will notice the check in/out columns have distances which are underlined:

Staff	Client	Date	Scheduled Start	Scheduled End	Actual Start	Actual End	Early / late arrival (mins)	Early / late departure (mins)	Client GPS	Check In GPS	Check In Distance (m)	Check Out GPS	Check Out Distance (m)	Line Manag
Smith									50.5400614 -3.6012422					
Mary Bass		2020-10-29	07:00	08:00					50.5312000 -3.6095000					
Jane Doe		2020-11-03	06:00	07:00					50.5311666 -3.6095021					
connor worth		2020-11-03	07:00	07:30										
Peter James		2020-11-03	07:30	14:30					50.3849710 -4.0990790					
Peter James		2020-11-09	22:00	07:30					50.3849710 -4.0990790					
Mary Bass		2020-11-10	13:00	14:00	14:29	14:31	-89	-31	50.5312000 -3.6095000	51.3178749 -2.1822805	<u>132,881.93</u>	51.3178711 -2.1822829	<u>132,881.53</u>	
Mary Bass		2020-11-10	18:30	20:00					50.5312000 -3.6095000					



Clicking any of these distances will present you with a map to show where the check in/out occurred in relation to the client's location:



## Planned Vs Actual Report

This report allows you to use various filters to show the planned time for a visit and when the visit actually took place. As well as showing you any time under or over the planned length of the call, it will also show a figure in relation to how late the call was:

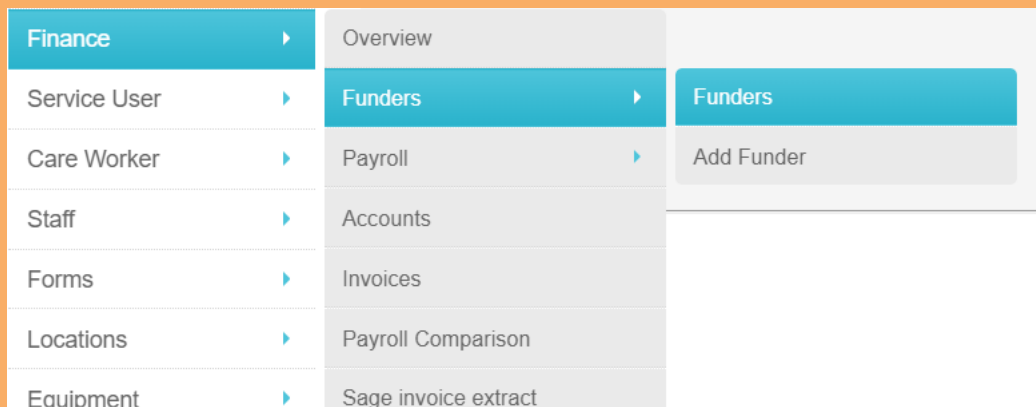
Barton, James	Rowan, Josh	23/05/18	Wednesday	06:00	07:00	60	06:00	07:00	60	Morning Call	06:00	07:00	60	0	0
		23/05/18	Wednesday	06:00	07:00	60	06:00	07:00	60	Morning Call	06:00	07:00	60	0	0
	Rowan, Josh	24/05/18	Thursday	06:00	07:00	60	06:00	07:00	60	Morning Call	11:14	12:14	60	0	-314

# Payment

## Using Funders

If your clients get their care paid for by a funder (such as the local Council, Social Services etc.) or you want to add your company to CareFor as an internal funder, here is how to do it.

Firstly, select the "Funders" tab from the "Finance" menu, then choose the "Add Funder" option:



The screenshot shows a multi-level menu structure. The 'Finance' menu is expanded to show 'Overview', 'Funders', 'Payroll', 'Accounts', 'Invoices', 'Payroll Comparison', and 'Sage invoice extract'. The 'Funders' sub-menu is also expanded to show 'Funders' and 'Add Funder'.

Finance	▶	Overview	
Service User	▶	Funders	▶
Care Worker	▶	Payroll	▶
Staff	▶	Accounts	
Forms	▶	Invoices	
Locations	▶	Payroll Comparison	
Equipment	▶	Sage invoice extract	
			Funders
			Add Funder

Fill out the details for the funder you wish to add. The "Your Ref" field will be where you enter the unique identifier used for the funder to recognise your company. Once you have entered the details, click "Save Changes".

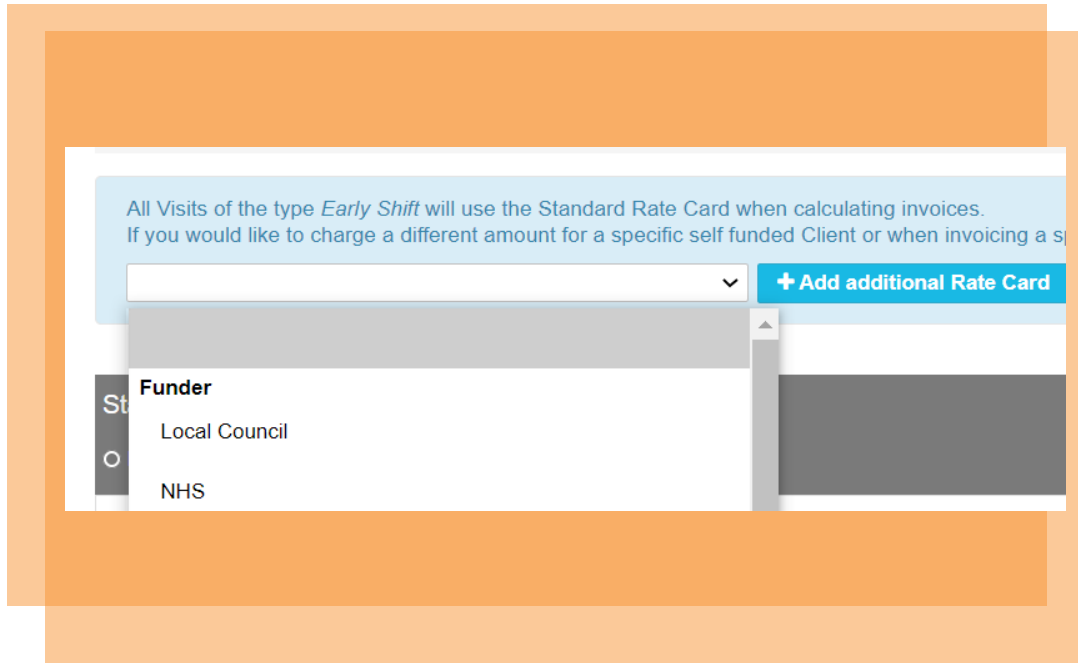
You will need to add each funder in turn to CareFor. Once you have added funders you can add the details to the relevant clients, and also create rate cards for specific funders.

## Adding Rate Cards for Funders

To add a rate card for a specific funder, firstly you need to access the "Assignment Types" tab under the "Settings" menu. From the list, choose which assignment needs a rate card for a funder by clicking the pound symbol to the right-hand side of the assignment:

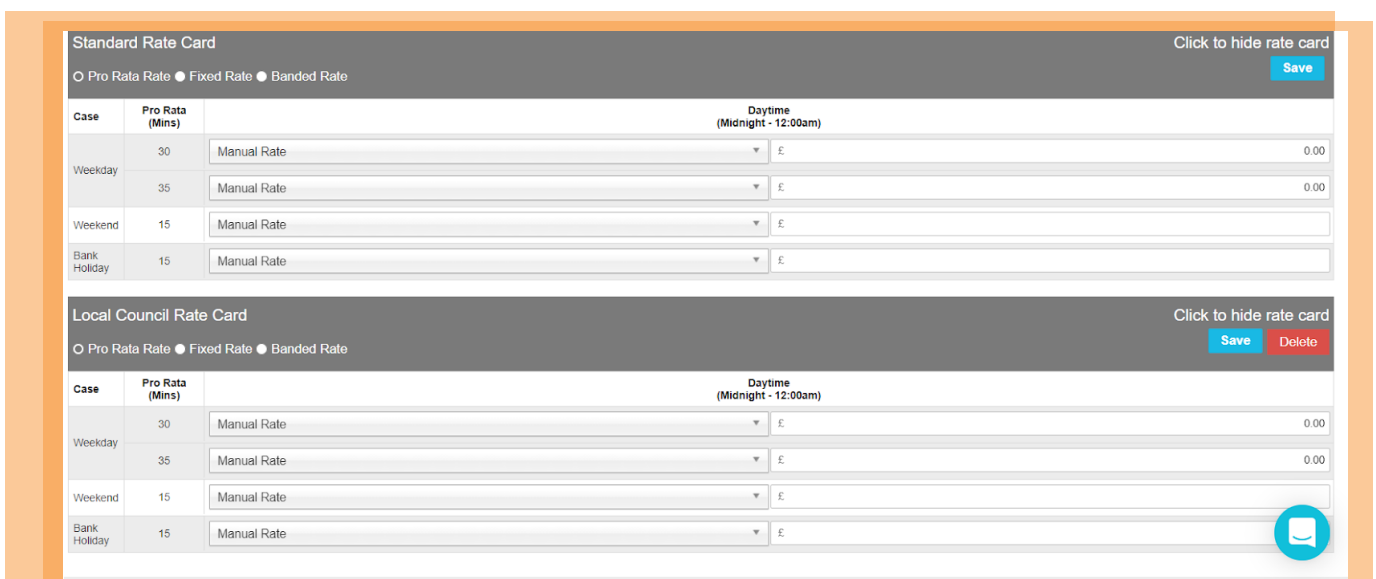
Assignment Type	Type	Service	Functions
Assessment	Assignment		£ ⚙️ 📄

Once you have clicked the pound symbol, you will need to **select the grey box** which says **"Select Client/Funder"** - this will then drop down to reveal all the funders and clients you have entered into CareFor:



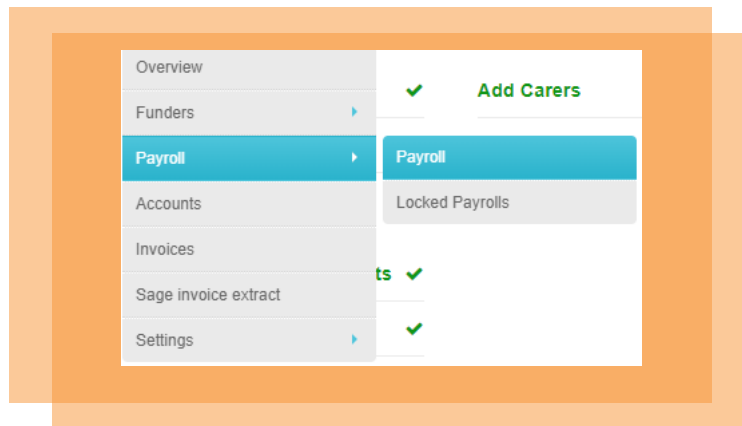
You need to **select the funder** from the list and then **click the "Add Rate Card" button**, this creates the rate card for you, and you can then input your variable or standard rates.

Please note, you **MUST** click **save** after you enter your rates.

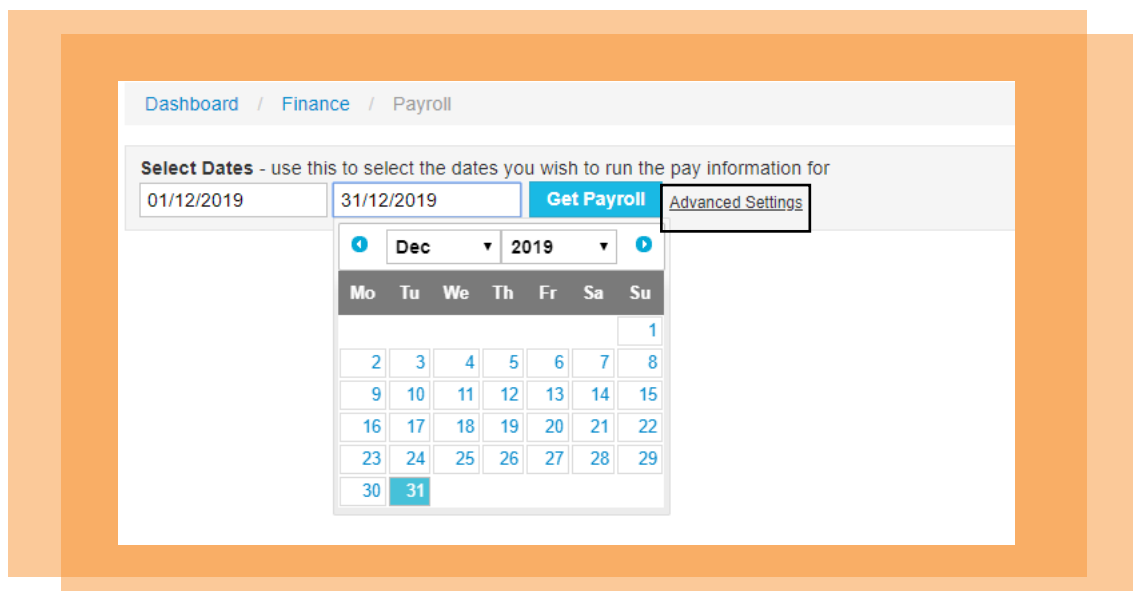


## Running Payroll

You can locate the payroll by choosing the "Finance" tab under the "Functions" menu, and clicking "Payroll":



You will then be presented with the date selector to allow you to choose the dates that you would like to run payroll for. Clicking in the boxes will bring up the calendar:



Once you have entered the dates, you will need to click the 'Advanced Settings' link, which will present further options for your payroll:

Select Dates - use this to select the dates you wish to run the payroll information for  
 01/10/2020 31/10/2020 **Get Payroll** Hide Advanced Settings

Actual Times  Scheduled Times

Select Staff - select the staff you want to run payroll for  
 - Select Region -

All Staff  
**No Payroll Group**  
 Bloggs, James  
 Nott, Laura  
 Parr, Jasmine  
 Riley, Luke  
 Rowan, Josh  
 Sillito, Claire

**Mileage** - set your mileage rules **Shift boundaries**

Pay mileage between assignments  
 Reached by **Driving** at 0.25 £/mile  
 Reached by **Cycling** at 0.10 £/mile  
 Reached by **Walking** at 0.00 £/mile

Pay carer to the first visit of the shift from  
 Staff Postcode

Pay staff/carer for travel time

**Additional Options**

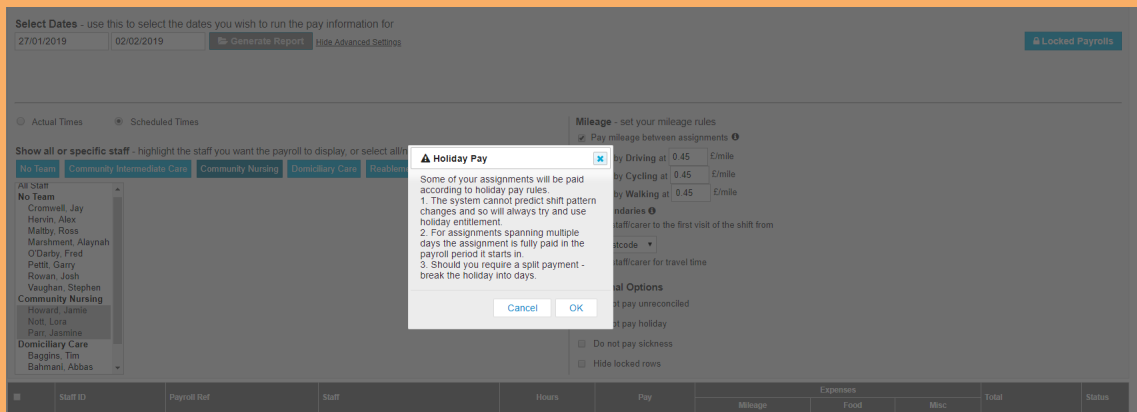
Do not pay unreconciled  
 Do not pay holiday  
 Do not pay sickness  
 Hide locked rows

The Advanced Settings allow you to:

- Choose whether to pay for "Actual" or "Scheduled" times. If "actual" times are selected, you can tick to cap at scheduled pay.
- Run payroll for all staff/individual staff or teams (holding down 'ctrl' and clicking the names with your mouse allows multiple name selections).
- Amend your mileage and travel pay settings and additional options.

Once you are happy with your settings, click "Get Payroll" to run your payroll. Whilst the report is generating, if any annual leave takes place within this date period the system will alert you to this and calculate the correct holiday entitlement.





If there are any issues with postcodes (for example new build properties) you will be alerted to this, and the error will be highlighted in red, with the problem postcode showing in bold.

Staff ID	Payroll Ref	Staff	Hours	Pay	Expenses			Total	Status
					Mileage	Food	Misc		
38	ABC924	Jamie Howard	12:00	£121.36	£0.00	£0.00	£0.00	£121.36	
213		Lora Nott	5:50	£75.72	£0.83	£0.00	£0.00	£76.55	

Assignment	Service User	Type	Times		Length	Pay	Job Role	Journey			Expenses			Total	Status						
			Scheduled	Actual				Start	End	Miles	Type	Travel Time (mins)	Travel Pay			Mileage	Food	Misc			
<b>Thursday 31/01/2019</b>																					
112479	Stacey Moore	DOM - Personal Care	8:00am	8:10am	11:09am	11:10am	0:10	£4.40	Carer - Level 2		TQ122QS	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£4.40	✓	
112475	Wendy Cowan	Community Support	8:30am	9:00am	11:17am	11:17am	0:30	£6.00	Carer - Level 2	TQ122QS	TQ121TG	0:33	Red	3	£0.50	£0.15	£0.00	£0.00	£6.65	✓	
112480	Stacey Moore	DOM - Personal Care	9:00am	9:15am	10:50am	10:50am	0:15	£4.40	Carer - Level 2	TQ121TG	TQ122QS	0:76	Red	0	£0.00	£0.34	£0.00	£0.00	£4.74		
112476	Wendy Cowan	DOM - Personal Care	12:30pm	12:55pm	10:57am	10:57am	0:25	£5.00	Carer - Level 2		TQ121TG	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£5.00		
112510	John Sainsbury	DOM - Personal Care	3:30pm	4:30pm	X	X	1:00	£12.00	Carer - Level 2		TQ156LX	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£12.00		
112477	Wendy Cowan	Community Support	4:50pm	5:35pm	10:57am	2:34pm	0:45	£9.00	Carer - Level 2	TQ156LX	TQ121TG	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£9.00	✓	
112500	George Pritchard	DOM - Personal Care	6:05pm	6:35pm	X	X	0:30	£6.00	Carer - Level 2	TQ121TG	TQ122QS	0:76	Red	6	£1.00	£0.34	£0.00	£0.00	£7.34		
112489	Nadeen Batty	DOM - Personal Care	8:30pm	9:30pm	X	X	1:00	£12.00	Carer - Level 2		TQ122EA	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£12.00		
<b>Saturday 02/02/2019</b>																					
112482	Stacey Moore	DOM - Personal Care	7:00am	8:00am	X	X	1:00	£12.00	Carer - Level 2		TQ122QS	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£12.00		
112484	Stacey Moore	DOM - Personal Care	9:00am	9:15am	X	X	0:15	£3.42	Carer - Level 2	TQ122QS	TQ122QS	0:00	Red	0	£0.00	£0.00	£0.00	£0.00	£3.42		
						5:50	£74.22									£1.50	£0.83	£0.00	£0.00	£76.55	

For a further breakdown of everything worked within that period, you can click the plus symbol to the left of the line to expand the details.

You can amend the pay and expenses columns prior to locking the report by clicking into the sections. The payroll report will also show the travel type for that visit. The default travel type can be amended in your app settings. You can also set the preferred travel type for individual staff within their profiles.

If holiday is booked for the payroll period, this entry will show in the report. You will see a coloured triangle in the upper right corner of the pay column to show green if the worker will be paid, or red if they shouldn't be paid. If you click the coloured triangle, the user is given the option to pay or not pay the staff for the holiday.

Staff ID	Payroll Ref	Staff	Hours	Pay	Expenses			Total	Status											
					Mileage	Food	Misc													
38	ABC924	Jamie Howard	12.00	£121.36	£0.00	£0.00	£0.00	£121.36												
Assignment	Service User	Type	Times		Length	Pay	Job Role	Journey			Expenses			Total	Status					
			Scheduled	Actual				Start	End	Miles	Type	Travel Time (mins)	Travel Pay			Mileage	Food	Misc		
Friday 01/02/2019																				
113158		Annual Leave	6.00am	6.00pm	9.00am	5.00pm	12.00	£121.36	Carer - Level 2	CF55BQ	TQ122QS	0.00	🚗	0	£0.00	£0.00	£0.00	£0.00	£121.36	✓
							12.00	£121.36							£0.00	£0.00	£0.00	£0.00	£121.36	

There is a "Bulk Action" menu which provides you with further options. You will need to use the bulk action menu to email and print the payroll report prior to locking the payroll, as this cannot be completed once locked.

You can manually make edits where appropriate on unlocked payroll rows and lock to make them permanent.

Staff ID	Payroll Ref	Staff	Hours	Pay	Expenses			Total	Status
					Mileage	Food	Misc		
<input checked="" type="checkbox"/> + 38	ABC924	Jamie Howard	12.00	£121.36	£0.00	£0.00	£0.00	£121.36	
<input checked="" type="checkbox"/> + 213		Lora Nott	5.50	£75.72	£0.83	£0.00	£0.00	£76.55	
<input checked="" type="checkbox"/> + 247		Jasmine Parr	15.30	£0.00	£0.00	£0.00	£0.00	£0.00	
			33.20	£197.08	£0.83	£0.00	£0.00	£197.91	

Bulk Action: -Select Action-  
-Select Action-  
Email Details  
Lock Payroll  
Print Details  
Print Summary

You need to select which members of staff you wish to complete the "Bulk Action" for by ticking the box on the left side of each line. You can then choose to:

- Email Details - this will email a copy of the payroll report details to the carer/staff member.

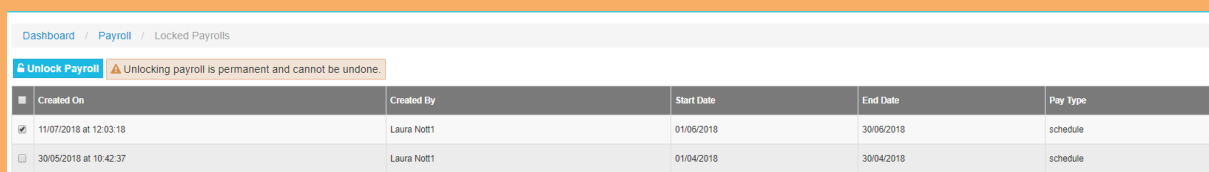


- Print Details - this will generate a PDF of the expanded payroll details for all staff which you have selected.

- Print Summary - this will generate a PDF of payroll details, with one line per carer/staff member.

- Lock Payroll - this allows you to generate a CSV of the payroll report.

There is now the option to unlock previously locked payrolls on CareFor. Within the payroll report, click the 'Locked Payroll' button, select the payrolls you wish to unlock using the tick boxes on the left-hand side and then click "Unlock Payroll".



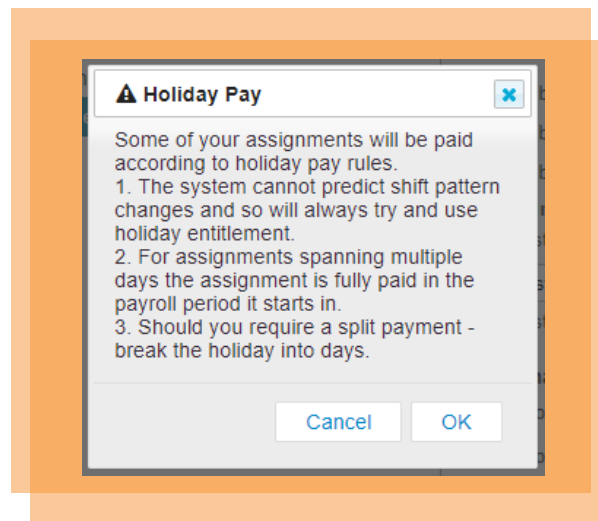
Created On	Created By	Start Date	End Date	Pay Type
<input checked="" type="checkbox"/> 11/07/2018 at 12:03:18	Laura Nott	01/06/2018	30/06/2018	schedule
<input type="checkbox"/> 30/05/2018 at 10:42:37	Laura Nott	01/04/2018	30/04/2018	schedule

## Paying Holiday

In order to pay holiday, you need to ensure the following are in place;

- The visit type accrues holiday.
- A holiday scheme is set up for the staff member.
- Have previously locked payroll data on CareFor.

When you run the payroll report, if holiday has been booked for that period this will show within the report.



When holiday is included within the report, you will see a coloured triangle in the upper right corner of the pay column. This will show green if the worker will be paid for the holiday or red if they should not be paid.

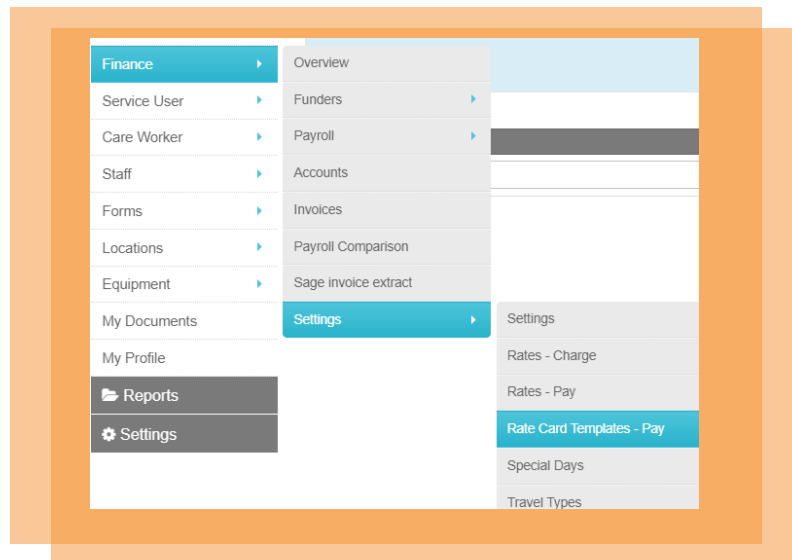
Holidays will be paid at the average daily rate calculated on the history of locked payroll.

When you click on the coloured triangle the person running payroll is presented with below screen which shows how many days requested, the user is then given the option to pay or not to pay:

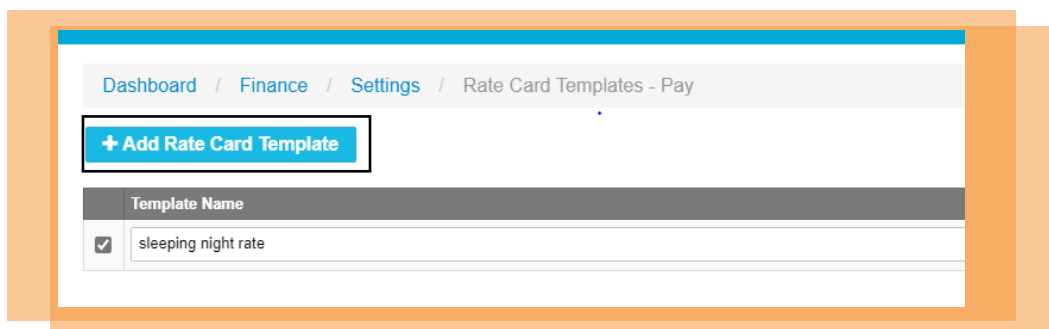
Staff ID	Payroll Ref	Staff	Hours						
97		Josh Carney	9:00						
Assignment	Service User	Type	Times		Length	Pay	Job Role		
			Scheduled	Actual					
<b>Tuesday 22/01/2019</b>									
<input type="checkbox"/> 112330	Joan Jett	DOM - Personal Care	7:40am	8:40am	x	x	1:00	£6.75	Support Worker
<b>Monday 28/01/2019</b>									
<input type="checkbox"/> 113176		Annual Leave	9:00am	5:00pm	x	x	8:00	£52.21	Support Worker
							9:00	£58.96	
							9:00		

# Creating Pay Rate Templates and Applying them to a Job Role

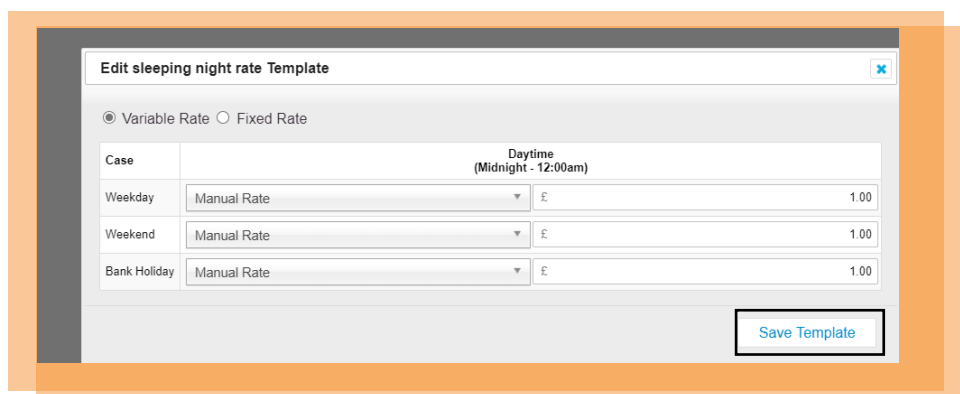
To Create a rate template, go to "Finance" – "Settings" – "Rate Card Templates Pay".



Select "Add Rate Card Template", and then type in the rate name such as "pay rate for sleeping night".



To add the rates, go to the "bulk action" menu and **press go** on "save/update template". You will then be presented with a new box to enter your new pay rate.

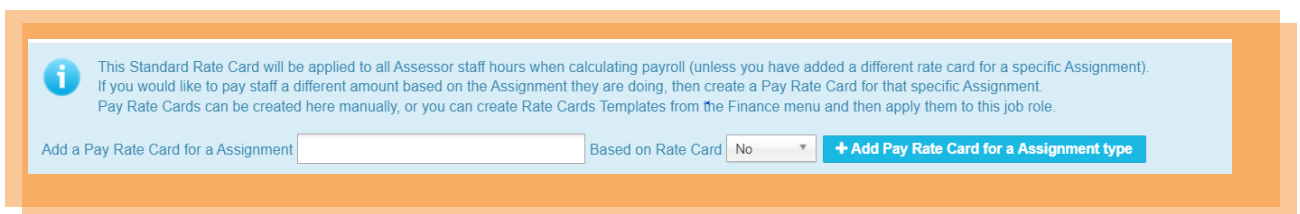


Once you have entered the new rate for pay **press save**. Your new pay rate template will now be available to use.

To apply the template to a job role, **go to "Settings" – "Job Roles"** and select the **"£"** symbol next to a job role.



At the very top you can select the visit type you would like the template to be assigned to by **selecting the visit type in the drop-down menu** and then select the template from the drop-down menu. Once you are happy with the selection **press "Add Pay Rate Card for Assignment Type"**.



The pay template will go into effect immediately and within the rate cards you will see that the template has now been applied to the visit type.



## Setting Pay Rates for Job Roles

To set the pay rates for each job role, you firstly need to access the "Job Roles" tab under the "Settings" menu. From the list, click the pound symbol to the right of the job role which you need to add a pay rate for:

Job Role	Category
Assessor	Staff

Once you have clicked the pound symbol, you will be able to add the pay rates to the "Standard" rate card for that job role. You can choose to enter a variable pay rate, or a fixed rate. Once you have entered the pay rates, please ensure you click "Save".

**Standard Rate Card** Click to hide rate card

Variable Rate  Fixed Rate

Type	Manual Rate	Daytime (Midnight - 12:00am)
Weekday	£20.00	£20.00
Weekend	£20.00	£20.00
Bank Holiday	£20.00	£20.00

If for particular job roles, you pay a different rate to your standard pay rate depending on the assignment type, you can also add these in. You will need to drop down the box next to "Add a pay rate card for an Assignment type" and select from the list which assignment type requires a separate rate card.

This Standard Rate Card will be applied to all Assessor staff hours when calculating payroll (unless you have added a different rate card for a specific Assignment).  
If you would like to pay staff a different amount based on the Assignment they are doing, then create a Pay Rate Card for that specific Assignment. Pay Rate Cards can be created here manually, or you can create Rate Cards Templates from the Finance menu and then apply them to this job role.

Add a Pay Rate Card for an Assignment  [+ Add Pay Rate Card for an Assignment type](#)

**View Assessor rates and charges**  
If no rate is specified, the next highest rate will be used pro-rata.

**Standard Rate Card** [Click to hide rate card](#)

Variable Rate  Fixed Rate

**Type**

Type	Manual Rate	Daytime (Midnight - 12:00am)
Weekday	Manual Rate	£ 20.00
Weekend	Manual Rate	£ 20.00
Bank Holiday	Manual Rate	£ 20.00

Dropdown menu options: Annual Leave, Assessment, Assessment, Cancellation - Chargeable, Cancellation - Non Chargeable, Coaching, Coaching Form, Complaints Form, Compliments Form, Domestic.

[Save as a New Rate Card](#) [Save](#)

Once you have selected the assignment type, please click "Add Rate Card". This will create the rate card for you, allowing you to enter the pay rate amounts:

Dashboard / Job Roles / Update Assessor Rates

This Standard Rate Card will be applied to all Assessor staff hours when calculating payroll (unless you have added a different rate card for a specific Assignment).  
If you would like to pay staff a different amount based on the Assignment they are doing, then create a Pay Rate Card for that specific Assignment. Pay Rate Cards can be created here manually, or you can create Rate Cards Templates from the Finance menu and then apply them to this job role.

Add a Pay Rate Card for an Assignment  [+ Add Pay Rate Card for an Assignment type](#)

**View Assessor rates and charges**  
If no rate is specified, the next highest rate will be used pro-rata.

**Standard Rate Card** [Click to view rate card](#)

**Coaching Rate Card** [Click to hide rate card](#)

Variable Rate  Fixed Rate

[Save as a New Rate Card](#) [Save](#) [Delete](#)

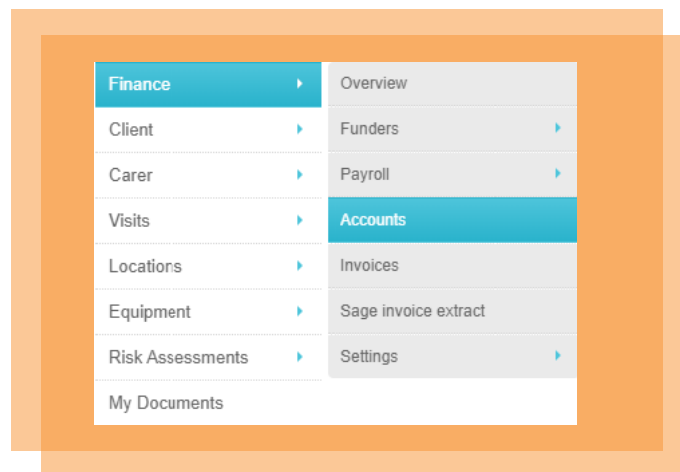
**Type**

Type	Manual Rate	Fixed
Weekday	Manual Rate	£ 0.00
Weekend	Manual Rate	£ 0.00
Bank Holiday	Manual Rate	£ 0.00

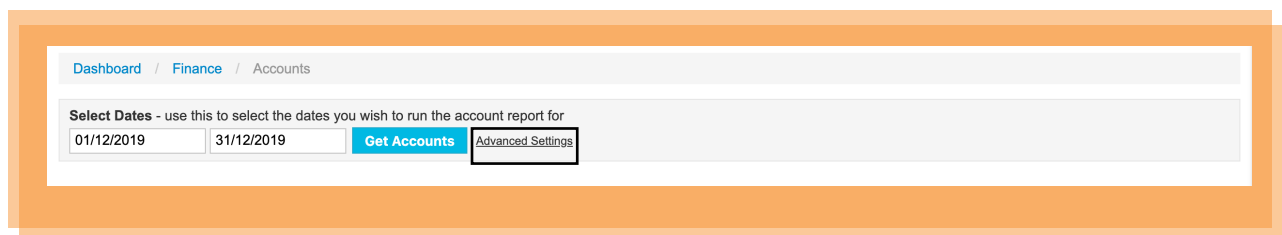
You can add multiple pay rate cards to each job role to ensure your payroll is accurate.

## How to Generate Invoices

To begin generating the invoice, you need to run the "Account Report". This is located under the "Finance" menu and selected by choosing "Accounts".



From here, you will then be presented with the option to choose the date range you wish to run the account report for, once you have chosen your dates, you then need to click the "Advanced Settings" option:



The advance settings allow you to choose further detail for your account report. You can choose to charge your clients for the actual times of care they have received, or for the scheduled times, a specific region and also how many rows to display.

Once you are happy that you have inputted the required information, click "Get Accounts" and CareFor will run the account report for you.

**Select Dates** - use this to select the dates you wish to run the account report for

01/12/2019 31/12/2019 Get Accounts [Hide Advanced Settings](#)

---

**Times to charge Client** - choose whether you want to charge the Client for the actual time or for the scheduled time

Actual Time  Scheduled Time

**Rows** - number of rows to display  
20

**Regions** - filter self funded Clients by region  
-Select-

**Funders** - filter by funder  
Self Funded + All Funders All Funders Only  
Self Funded Local Council

Group by Client

The Account Report is listed alphabetically with clients first, and all bulk funders listed afterwards. You can navigate between the pages using the "Next Page" option.

	Accounts Ref	Clients	Total Hours	Total Charge	Reconciled
<input type="checkbox"/>	[+]	Mr Jack Barton	2hrs 0 mins	£35.00	
<input type="checkbox"/>	[+]	Miss Mary Bass	31hrs 30 mins	£1140.00	
<input type="checkbox"/>	[+]	Mrs Jane Doe	1hrs 30 mins	£17.50	
<input type="checkbox"/>	[+]	Mr Peter James	21hrs 40 mins	£105.00	
<input type="checkbox"/>	[+]	Mrs Catherine Smith	1hrs 0 mins	£35.00	
	Accounts Ref	Funders	Total Length	Total Charge	Reconciled
<input type="checkbox"/>	[+]	Local Council	1hrs 0 mins	£35.00	
<input type="checkbox"/>	[+]	NHS	0hrs 0 mins	£0.00	
<b>Grand Total Hours</b>			<b>58hrs 40mins</b>	<b>Grand Total Charge</b>	<b>£1367.50</b>

To view the breakdown of charges for individual clients, click the plus symbol to the left of any line:

	Accounts Ref	Clients	Total Hours	Total Charge	Reconciled							
<input type="checkbox"/>	[+]	Mr Jack Barton	2hrs 0 mins	£35.00								
	<input type="checkbox"/>	882	09/12/2019	Personal Care - Morning	Jasmine Parr	Client Home	1hrs 0mins	£17.50	£0.00	£17.50		
	<input type="checkbox"/>	887	10/12/2019	Personal Care - Morning	Laura Nott	Client Home	1hrs 0mins	£17.50	£0.00	£17.50		
	Description								Qty	Rate	Charge	
	Personal Care - Morning 60 mins Weekday daytime rate								2.00	17.50	35.00	



For bulk funders, you can also break down the charges, again clicking the plus symbol:

Accounts Ref	Funders	Total Length	Total Charge	Reconciled							
<input type="checkbox"/> <input type="checkbox"/>	Local Council	1hrs 0 mins	£35.00								
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>							
ID	Date	Visit	Carers	Location	Hours	Charge	Expenses	Total Cost	Invoice	Reconciled	
<input type="checkbox"/>	885	10/12/2019	Personal Care - Morning	connor worth,Claire Sillito	Client Home	1hrs 0mins	£35.00	£0.00	£35.00		
Description								Qty	Rate	Charge	
Personal Care - Morning 60 mins Weekday daytime rate								2.00	17.50	35.00	

If you are happy that all your charges look correct, you can now utilise the “Bulk Action” menu. The “Bulk Action” menu contains two options - you can export the charge details as a CSV or create an invoice.

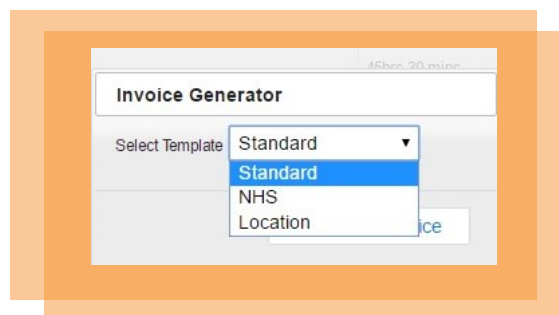
In order to use the Bulk Action menu, you must first select clients using the tick boxes to the left side of each line. After choosing the Bulk Action, you then click “Go”.

Accounts Ref	Clients	Total Hours	Total Charge	Reconciled
<input checked="" type="checkbox"/> [*]	Mr Jack Barton	2hrs 0 mins	£35.00	

Bulk Action Export as CSV  
Create Invoice(s) Go

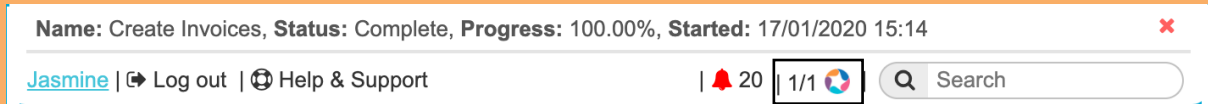
If you have chosen to “Export as CSV” then this will create the Document as a download.

If you have chosen “Create Invoice(s)” then you will be presented with an option to choose the invoice template, you require:

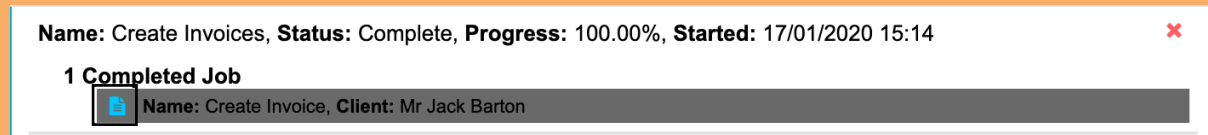


Once you have made your choice, click “Generate Invoice” and the Invoice will generate for you. This will be generated in the background, meaning you will be able to navigate

away from the page and continue with other tasks whilst waiting. Clicking on the CareFor Symbol in the user toolbar will show you the progress of the task and when it has been completed.

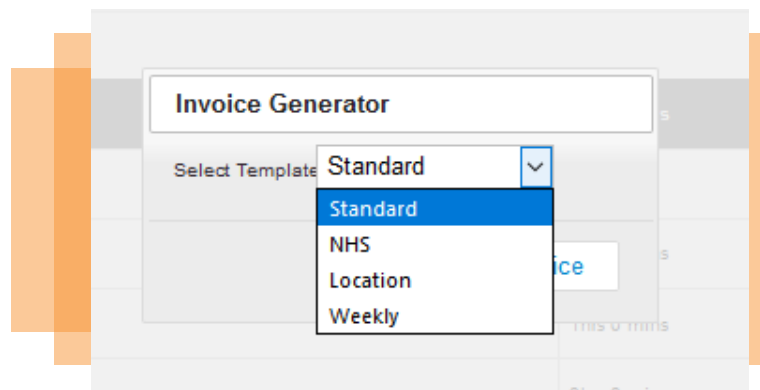


Clicking the task will list all completed jobs. You will then be able to open the invoice generated by clicking on the document icon highlighted in blue, a separate window will then open with the generated invoice in PDF format.



## Invoice Types

When creating your invoices in CareFor, you have four choices of invoice type- Standard, NHS, Location and Weekly:



The "Standard" invoice, is all the visits within your selected period, presented as a list:



The image shows a standard invoice template. At the top left is the Carefor logo with the tagline "Software For Companies That Care". Below the logo, the client's details are listed: Mr Jack Barton, 144 Mulberry Close, Paignton, Devon, TQ33GD. To the right, the CareFor company address is provided: Bridge House, Courtenay Street, Newton Abbot, TQ12 2QS, with a telephone number of 01626798890. The invoice number is 00014 and the date is 17/01/2020. A table lists two visits: #882 on 09/12/19 and #887 on 10/12/19, both for personal care in the morning, each lasting 1 hour and costing £17.50. The total cost is £35.00. A note at the bottom states "Payment is to be received within 7 days."

The "NHS" template allows you to send an invoice with a client reference instead of their name (if required):



The image shows an NHS invoice template. It features the Carefor logo and contact information for 6 Bridge House, Courtenay Street, Newton Abbot, TQ12 2QS. The invoice is addressed to Dr Rebecca Tregenna. It includes a table for account details with columns for Account Number, PO Number, Requisitioner, Delivery Note, and Terms. A main table lists services: 1 hour Bedtime Call (£24.00 per hour, total £24.00), Expenses (£0.00, total £0.00), and 0.5 hours Morning Call (£40.00 per hour, total £20.00). The subtotal is £44.00. Payment instructions are provided, including the remittance email address: technical@webformed.co.uk. The total due is £44.00.

The "Location" template allows you to invoice for a location. For example, if you also provide training, you can invoice a company for the training you have provided to their staff at your location:

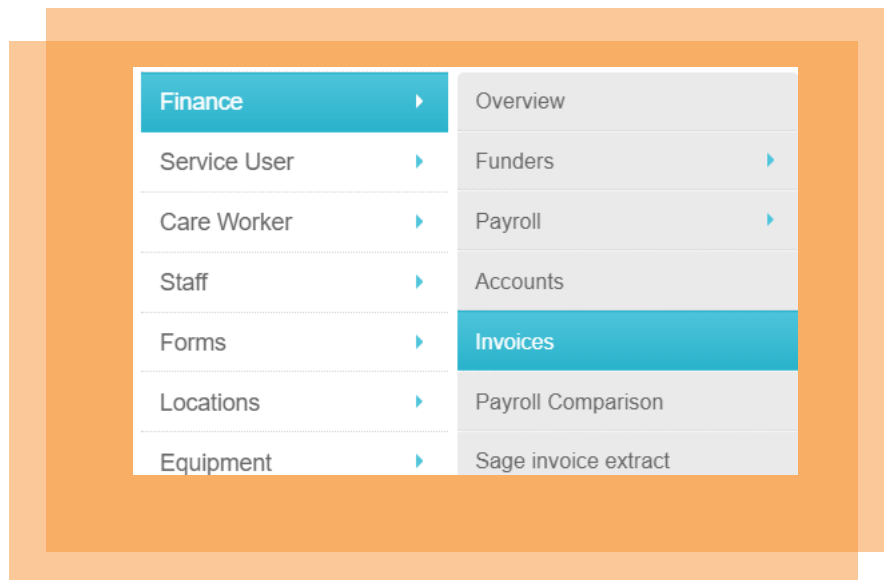


The "Weekly" invoice is a breakdown of your invoicing period into the different weeks based on the date range you have selected:

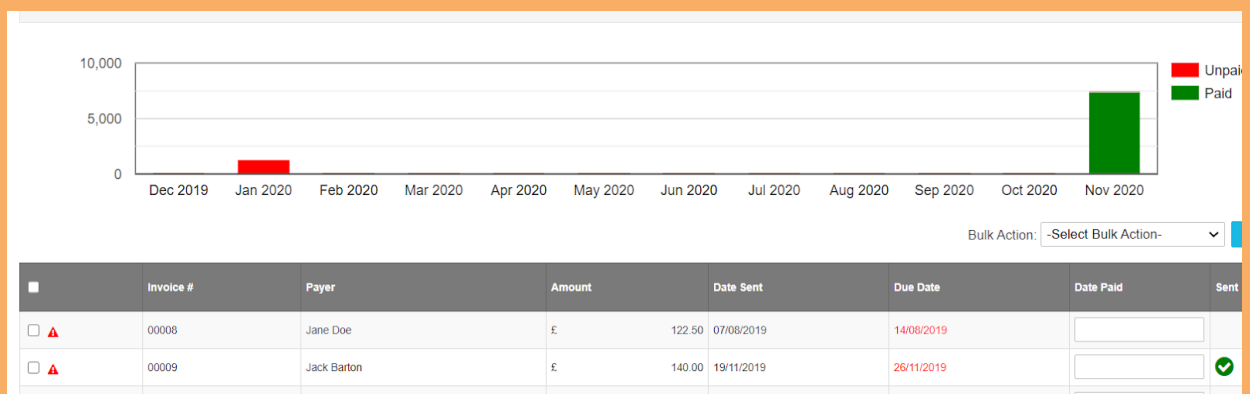


## Managing Invoices with Invoicing Options

When you have created your invoices, you then have various options as to what you can do with the invoices. To view all the invoices you have created, from the "Functions" menu locate the "Finance" tab and click "Invoices":

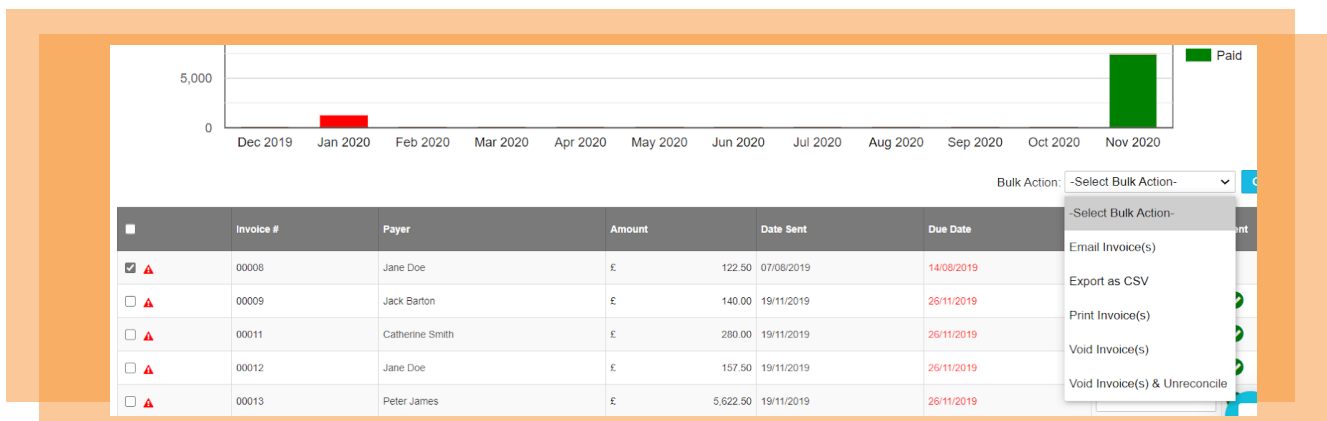


The invoices will always be displayed by oldest unpaid first:



In this view, you can use the date filter to find invoices between a date range of your choice, or by the invoice number. You can also mark invoices as paid in here too. Simply click inside the box in the "Date Paid" column to choose a date.

There is also a "Bulk Action" menu which provides you with various options. In order to use any of the "Bulk Actions" you first need to **select one or more invoices using the tick boxes** on the left-hand side.



The "Bulk Action" menu contains the following options:

- Email Invoice(s) - depending on who is selected to receive the invoices (individual, family member or bulk funder) you can choose to email the selected invoices here. You will also be presented with an option to 'Mark as Sent'.
- Export as CSV - this generates a CSV document based on the invoices you have selected
- Print Invoices(s) - allows you to print out the selected invoices. Again, this option presents you with the 'Mark as Sent' button.

- Void Invoice(s) & Unreconciled - this will void the selected invoices. Please note that if an invoice has been marked as paid, you cannot void it.

-Void invoice – this will void the invoice and not reconcile the visits

## Individual Client Invoices

Within the client's profile, there is an "Invoices" tab. Here, you can see all invoices that have been generated for the individual client. Again, you have the option to **filter** between two dates, and also search by invoice number:

The screenshot displays the 'Invoices' tab for a client named Mary Bass. The interface includes a date filter, a bar chart, and a table of invoices.

**Date Filter - use this to select invoices raised between two dates**

01/01/2020 | 22/11/2020 | Invoice Nos | All Invoices | **Get Invoices**

**Bar Chart:** Shows invoice amounts over time. The Y-axis ranges from 0 to 10,000. The X-axis shows months from Dec 2019 to Nov 2020. A red bar indicates an unpaid invoice in Jan 2020, and a green bar indicates a paid invoice in Nov 2020.

**Table:**

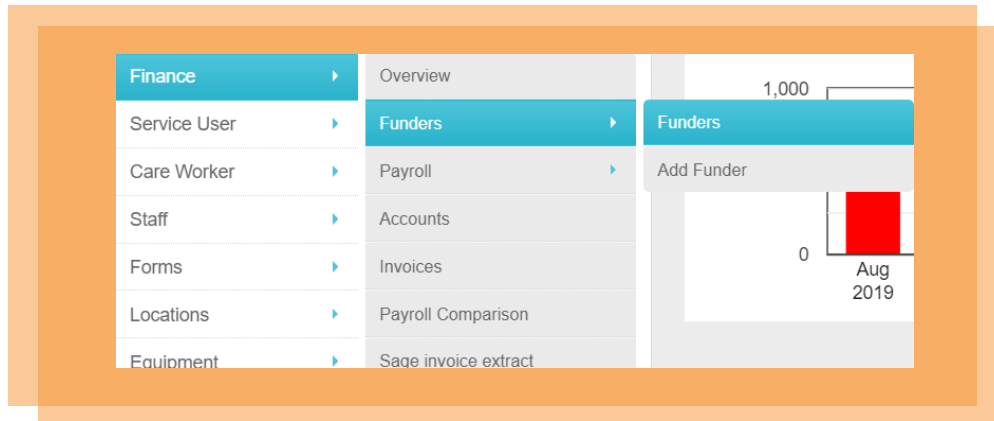
	Invoice #	Payer	Amount	Date Sent	Due Date	Date Paid	Sent
<input type="checkbox"/>	00015	Mary Bass	£ 1,140.00	17/01/2020	24/01/2020		
<input type="checkbox"/>	00020	Mary Bass	£ 4,593.75	10/11/2020	17/11/2020	10/11/2020	

If you click on the "Invoices" tab within a client profile and it is empty, this may be due to their care being paid for by a bulk funder.

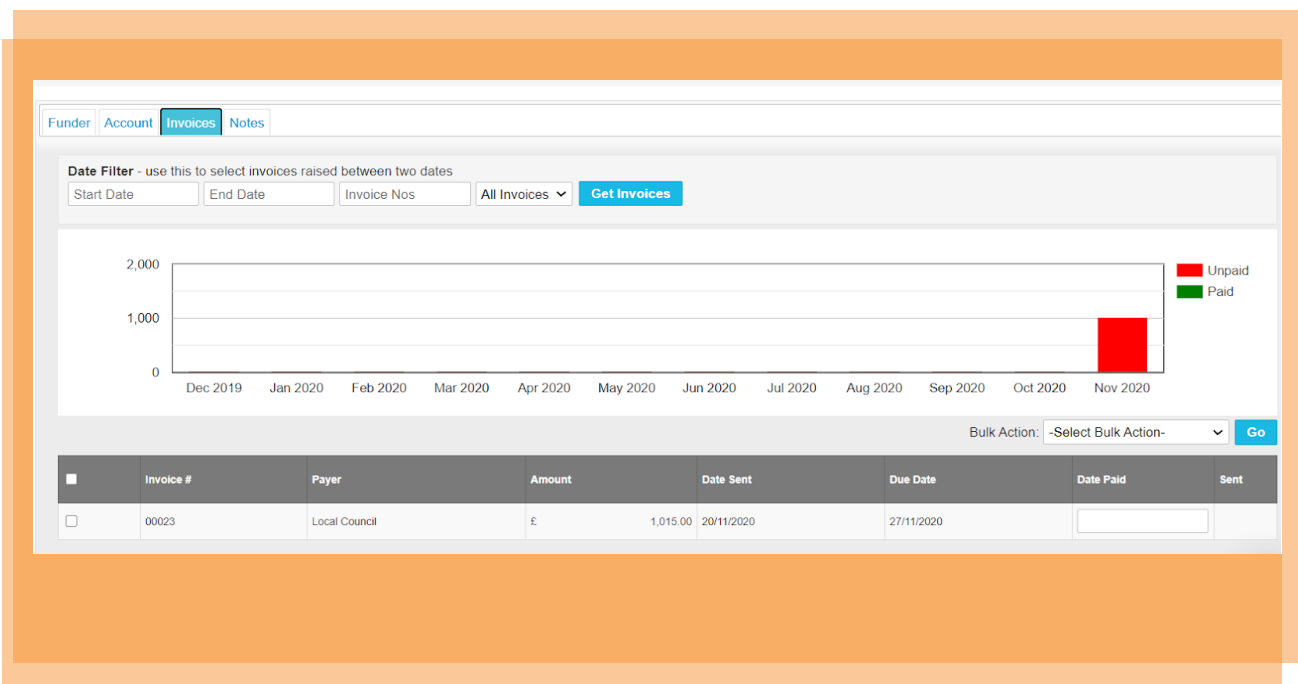


## Bulk Funders

If you have bulk funders on the system, then all their invoices will be found within their profiles. To locate these, under the "Functions" menu, choose "Finance" and then "Funders":



From the list of "Funders", you can then choose which one you want to view by clicking the name. Once in the "Funder" profile, click the "Invoices" tab to view all invoices for that funder. As with all invoice views, you can filter the invoices by a date range or invoice number:

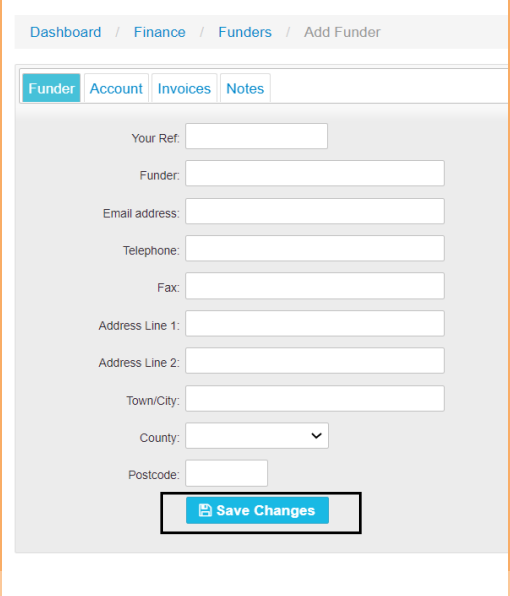




If your clients get their care paid for by a funder (such as the local Council, Social Services etc.) or you want to add your company to CareFor as an internal funder, here is how to do it.

Firstly, select the "Funders" tab from the "Finance" menu, then choose the 'Add Funder' option. Fill out the details for the funder you wish to add. The "Your Ref" field will be where you enter the unique identifier used for the funder to recognise your company.

Once you have entered the details, click 'Save Changes'.



The screenshot shows a web interface for adding a funder. The breadcrumb trail at the top reads "Dashboard / Finance / Funders / Add Funder". Below this is a navigation bar with tabs for "Funder", "Account", "Invoices", and "Notes", with "Funder" being the active tab. The form contains the following fields: "Your Ref:" (text input), "Funder:" (text input), "Email address:" (text input), "Telephone:" (text input), "Fax:" (text input), "Address Line 1:" (text input), "Address Line 2:" (text input), "Town/City:" (text input), "County:" (dropdown menu), and "Postcode:" (text input). A "Save Changes" button with a floppy disk icon is located at the bottom of the form.

You will need to add each funder in turn to CareFor. Once you have added funders you can add the details to the relevant clients, and also create rate cards for specific funders.

Any other information can be found by going to [support.care-for-it.com](https://support.care-for-it.com) where there is an abundance of support articles to help you 24/7.

Otherwise you can contact our friendly support team 9am-5pm weekdays by phone on 01626 798890 or via email at [support.care-for-it.com](mailto:support.care-for-it.com).

