Carefor

Software For Companies That Care

Training Pack for Office Staff: Using the Desktop System

Contents

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.

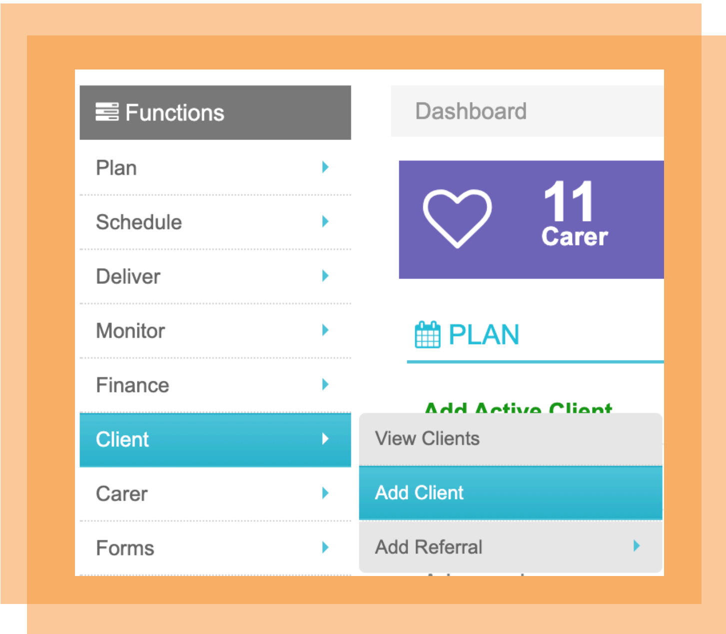
Payment

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:

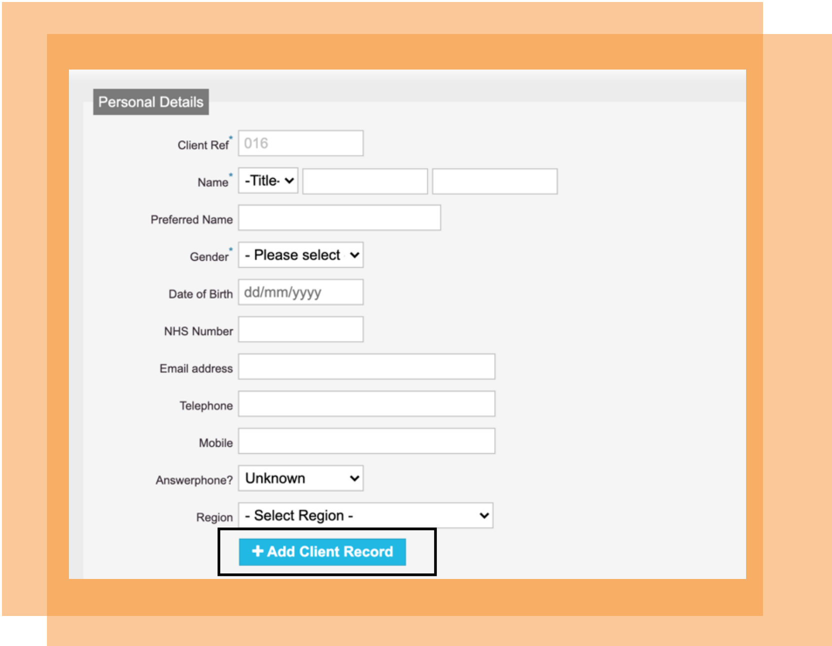
- Client ID (if you have your own system for client ID numbers, you will enter this here, otherwise the system will auto generate a number for you)

- Client Name

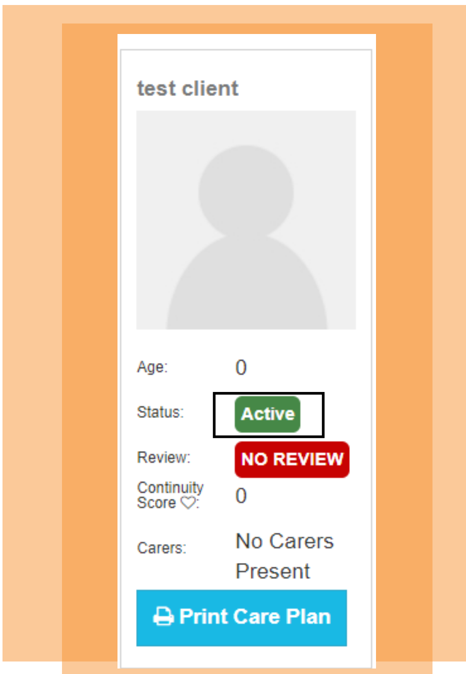
- Client Gender

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

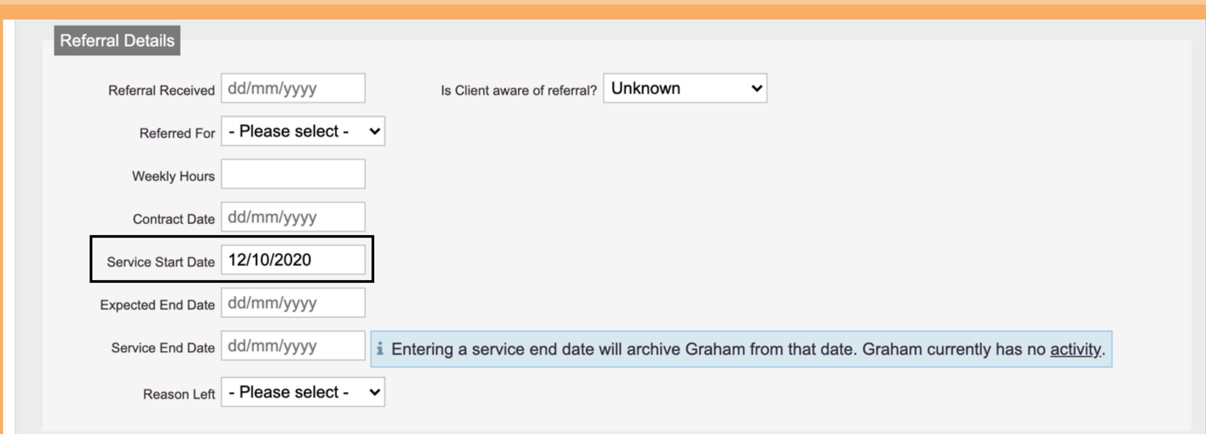
Once you have entered the information required, click 'Add Client Record':



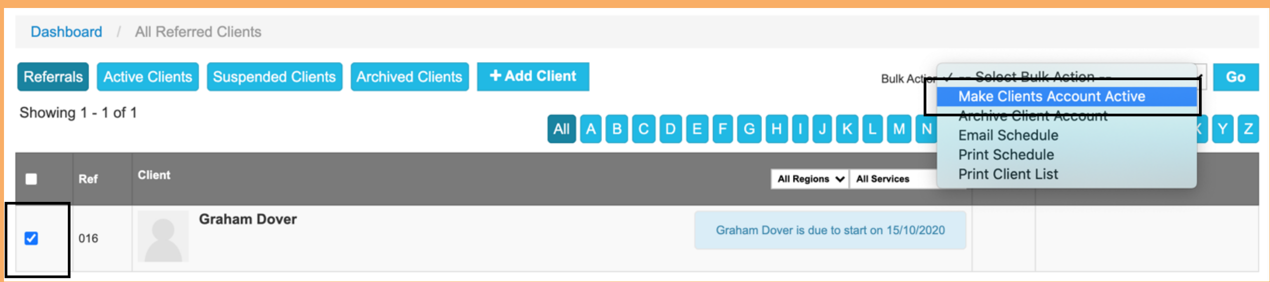
Please note, once the client has been added he/she will show as active on the system if their referral date is the current date. However if the referral date is in the future, they will be moved to the referral section.



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.



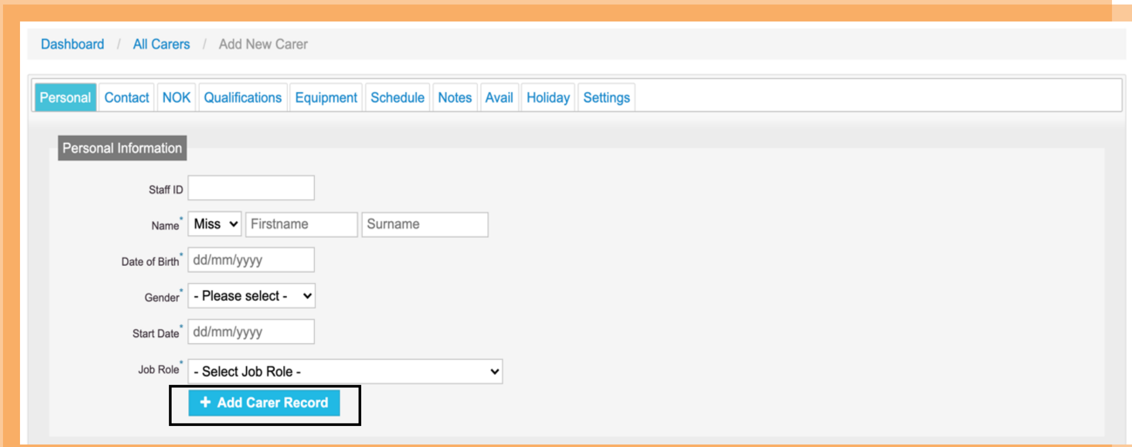
Or you can go to the 'Client' tab, then 'View Clients' and select the referral tab at the top. Select the tick box next to the client you would like to make active, once you have selected the tick box go to the bulk action menu and select 'Make Clients Account Active'.



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.

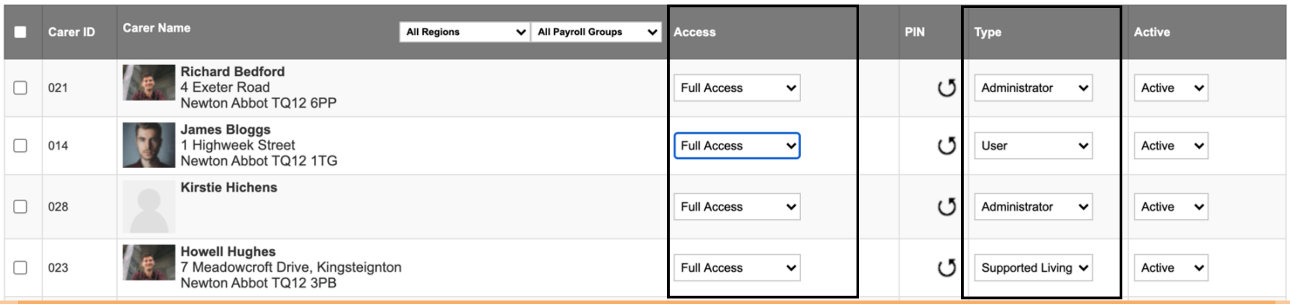


Once you have added the new staff profile, you will need to amend their access level to ensure they are able to access CareFor.

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:

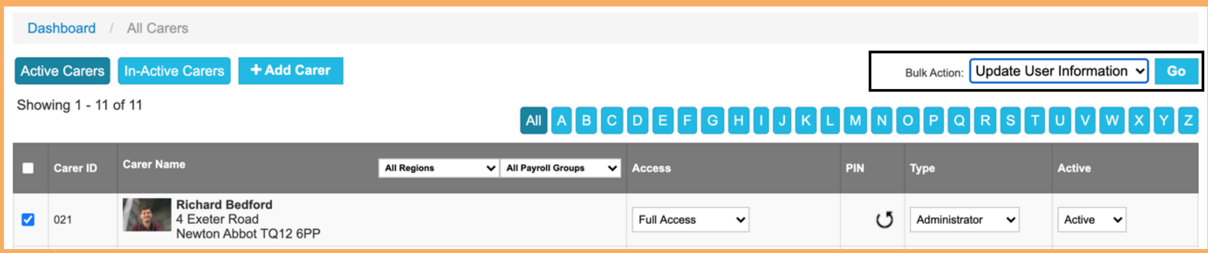


Carer ID	Carer Name (All Regions / All Payroll Groups)	Access	PIN	Type	Active
021	Richard Bedford 4 Exeter Road Newton Abbot TQ12 6PP	Full Access		Administrator	Active
014	James Bloggs 1 Highweek Street Newton Abbot TQ12 1TG	Full Access		User	Active
028	Kirstie Hichens	Full Access		Administrator	Active
023	Howell Hughes 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	×	×	×
Electronic Logging	×	✓	✓
Full Access	✓	✓	✓

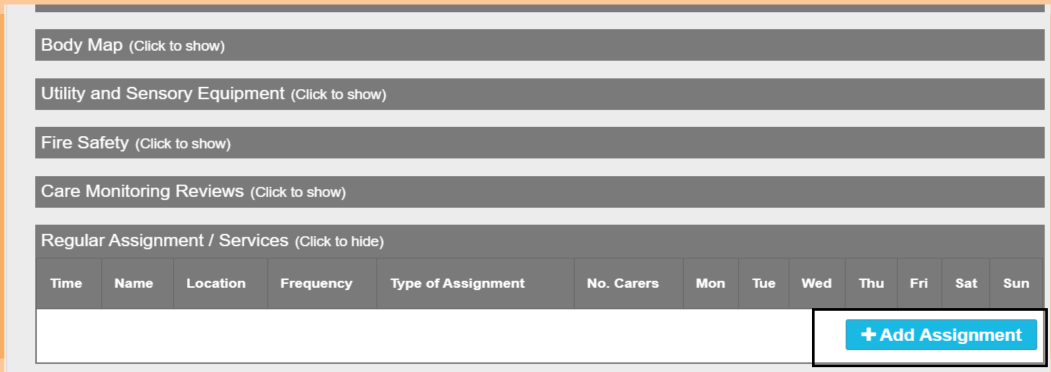
If you have amended a carer or staff member's access level or type, you must remember to save the changes. This is done using the "Bulk Action" drop down, selecting "Update User Information" and clicking "Go":

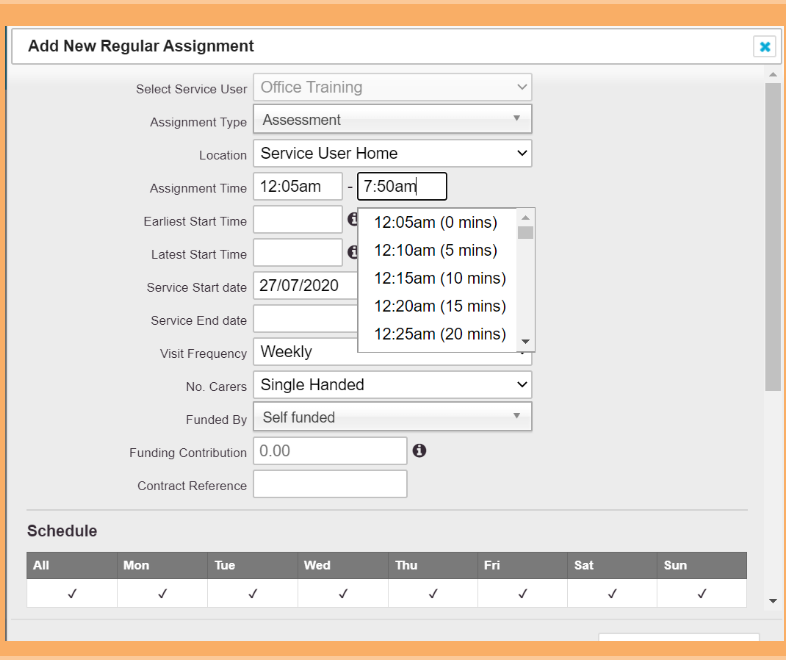


Adding Regular Visits

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.

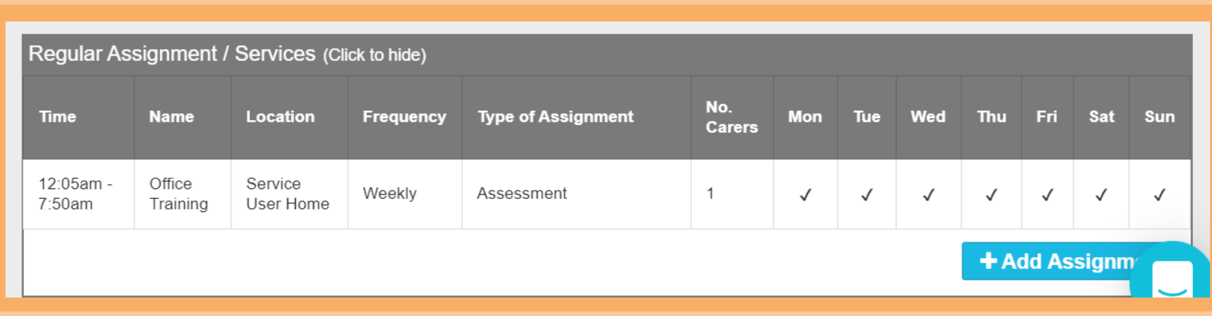
Inside the client's profile, you need to click into the "Care Plan" tab and then open the "Regular Assignments / Services". To add a regular visit, click "add Assignments" and input the assignment details:





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)

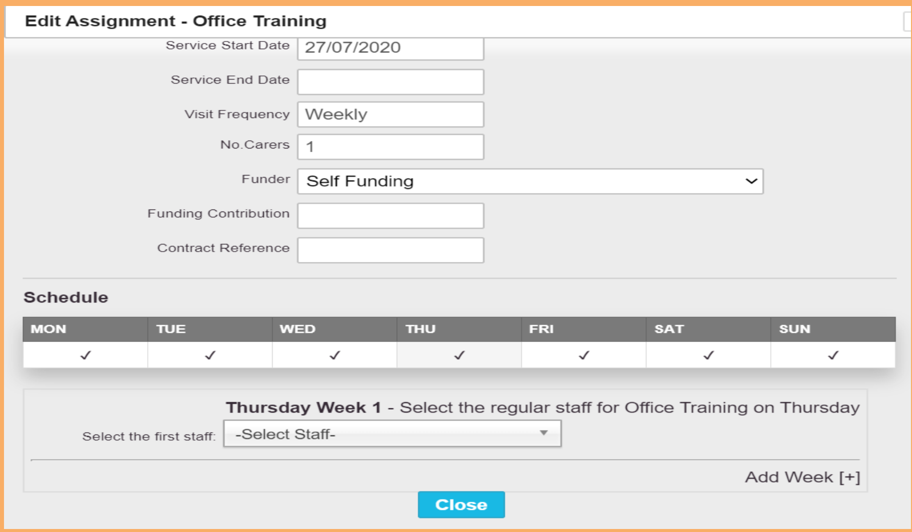
Time	Name	Location	Frequency	Type of Assignment	No. Carers	Mon	Tue	Wed	Thu	Fri	Sat	Sun
12:05am - 7:50am	Office Training	Service User Home	Weekly	Assessment	1	✓	✓	✓	✓	✓	✓	✓

+ 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.

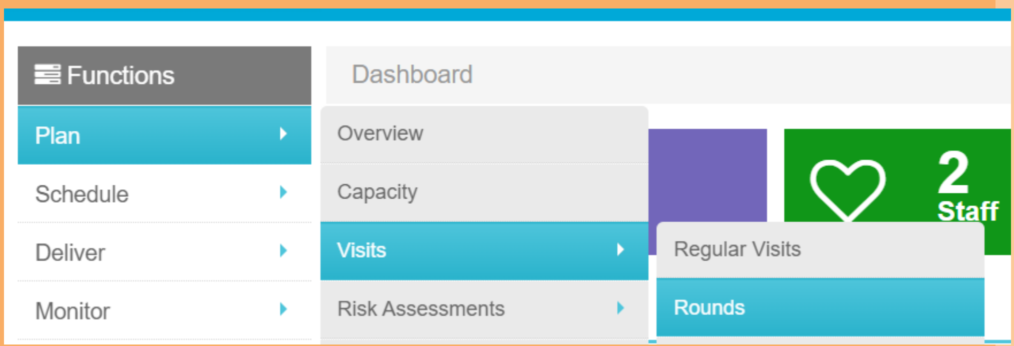
Select the day you would like to assign a regular carer too and **then select the carer**

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.

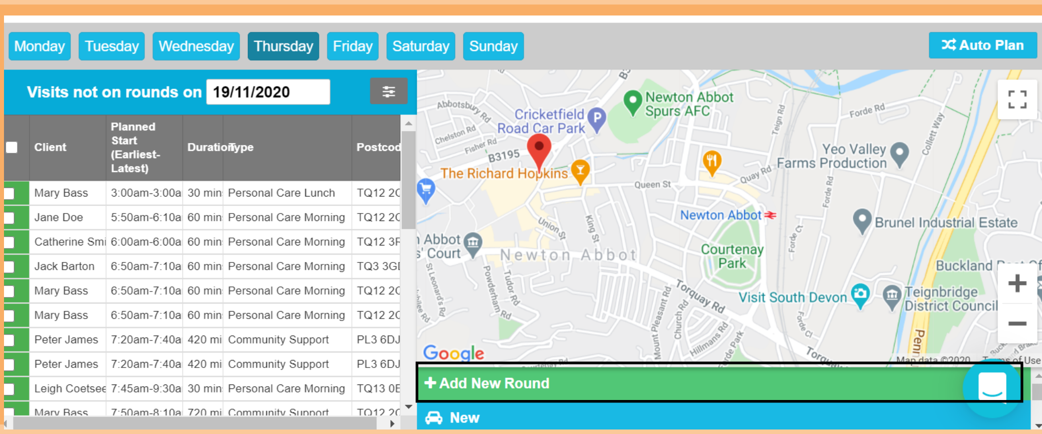


Using Rounds - Creating a Round

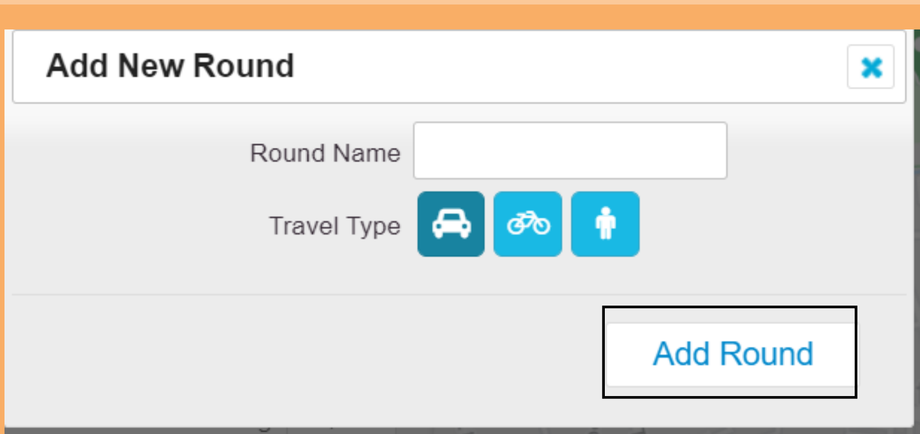
To create a round access the Functions menu, go to "Plan", 'Visits" and choose "Rounds".



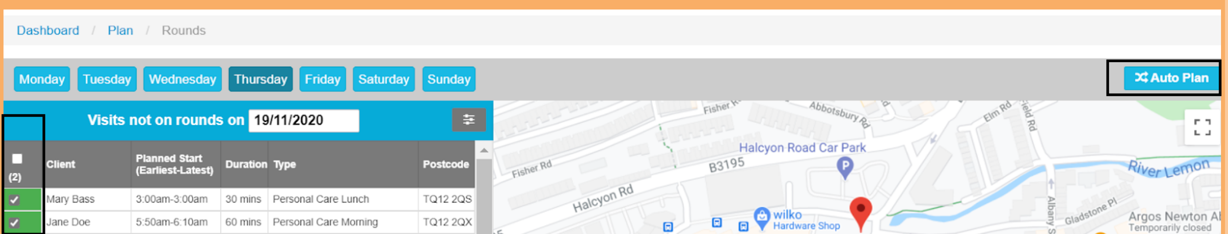
Change the date to the date you need the round to start then click "Add New Round".



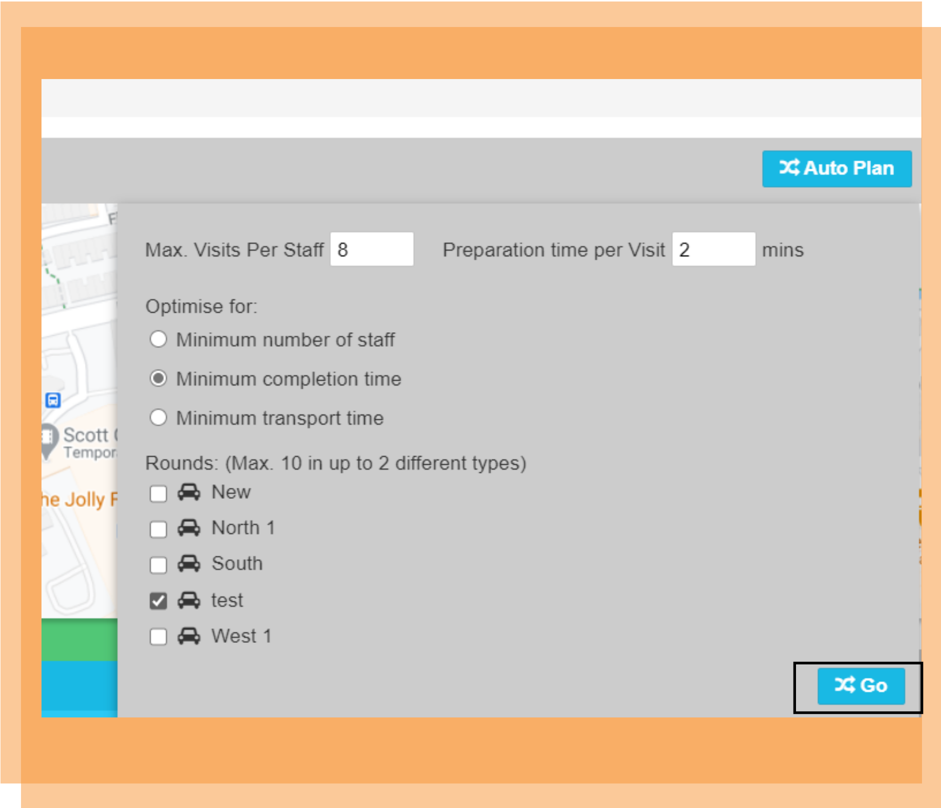
In the pop up that appears, add the Round name and click "Add Round".



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.

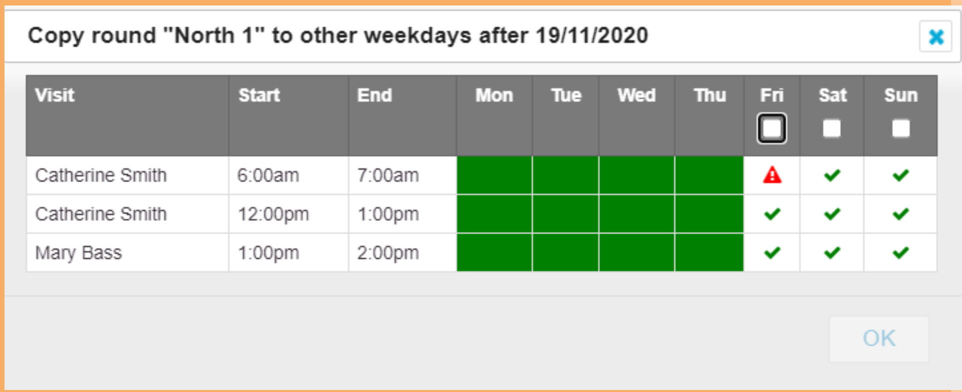


Once you press auto plan you will then be presented with another box where you have the option to select the round you would like the calls to go into, as well as other features such as minimum completion time.



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.



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

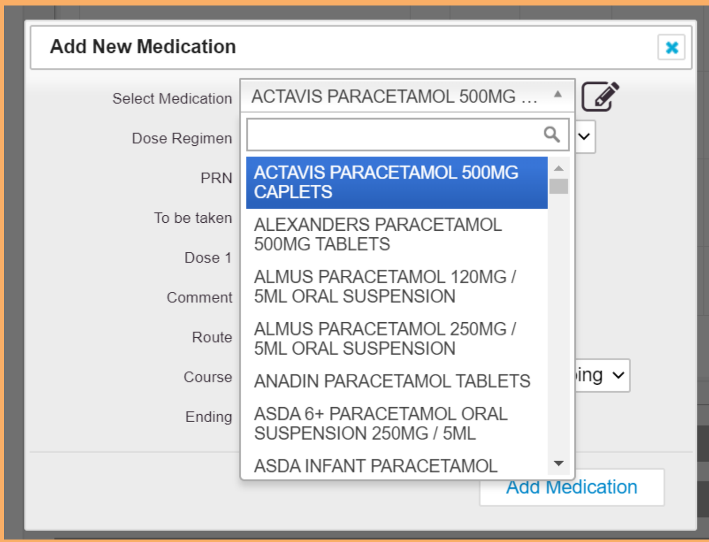
A green tick means that the assignment can be copied, and a green box means that the assignment is already assigned to a round on that particular day.

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.

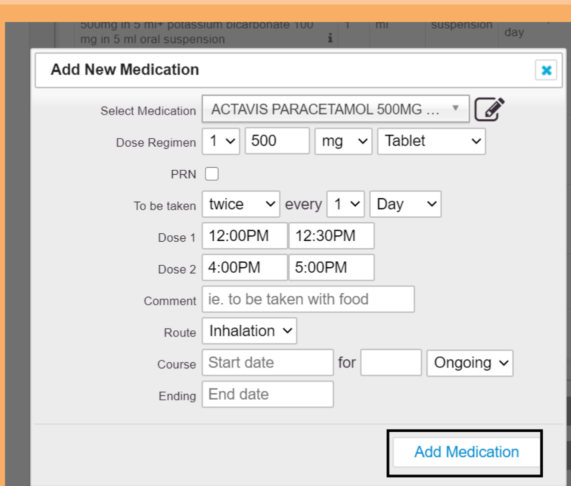


Please note - if you are searching for a medication and it is not appearing, check that:

- 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	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.

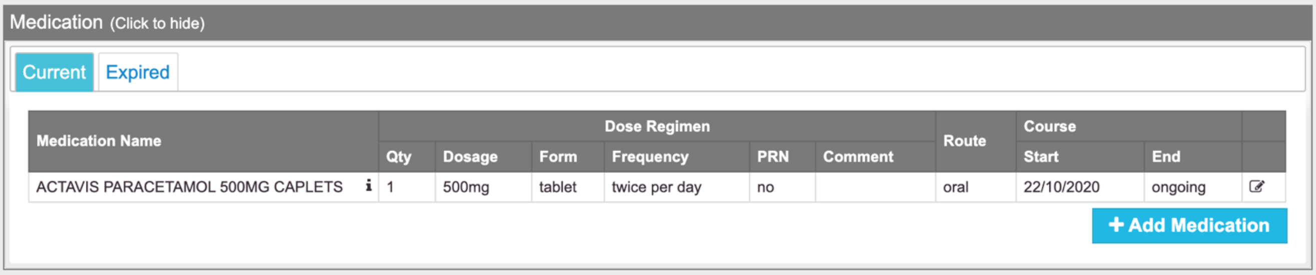
On the desktop site, you will be able to **select the time that the medication was administered on the MAR tab**.

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

Viewing Current and Expired Medication

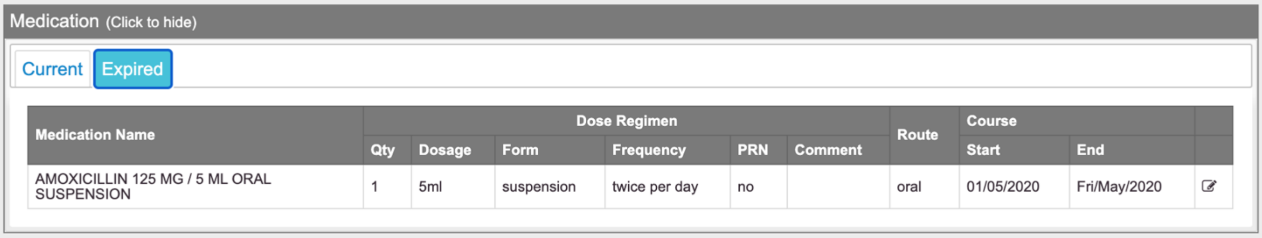
You are able to view all current and expired medications within a client's profile. Locate their profile and **click the "Care Plan" tab**. Scroll down **and click "Medication"**, here you should see a "Current" and "Expired" tab.

Current:



Medication 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	

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.

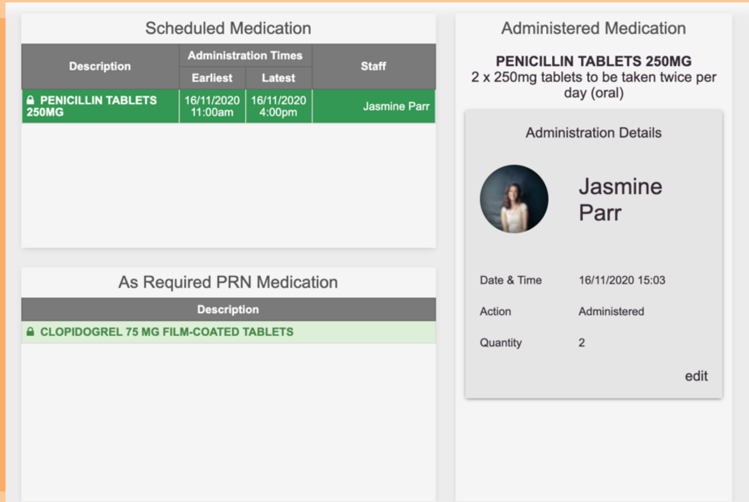
Medication briefcase highlighted in orange means that medication has been assigned to the visit however not yet given:

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

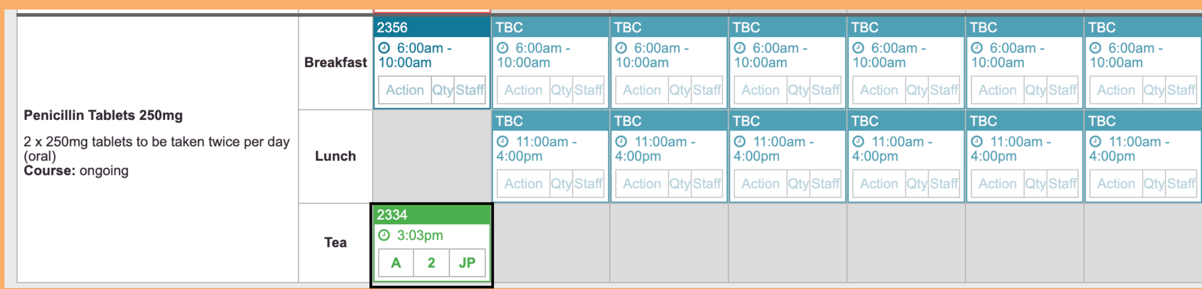
Medication briefcase highlighted in red means that more medication may have been recorded then what was scheduled (possible overdose):

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.



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



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

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.

Planned Medication

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

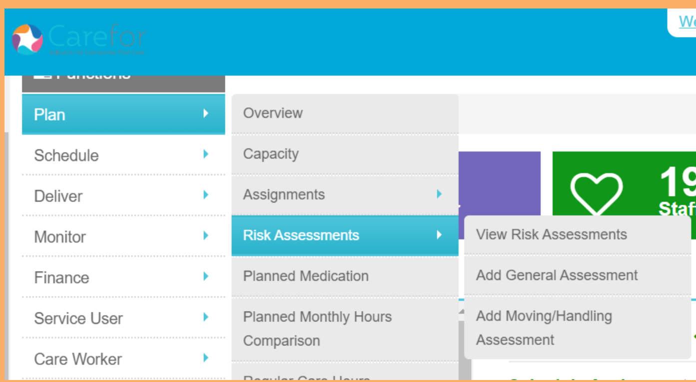
The report will list all current medication. The Allocated ID gives the visit the medication has been allocated to. If the Allocated ID is empty, the "Possible Bookings" column will tell you whether there is a scheduled booking to which this medication should have been allocated. The "Possible Regular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

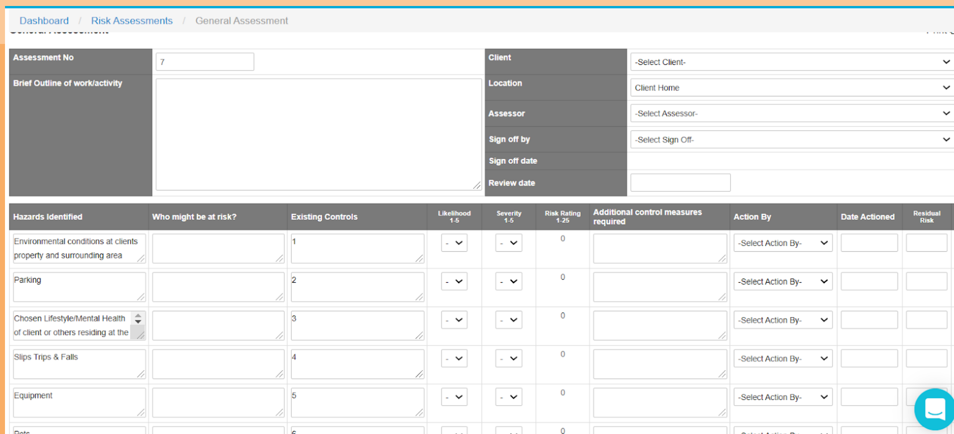
Please ensure you also check the medication comment as this report does not currently filter out weekly medications on days that they are not take.

Risk Assessments

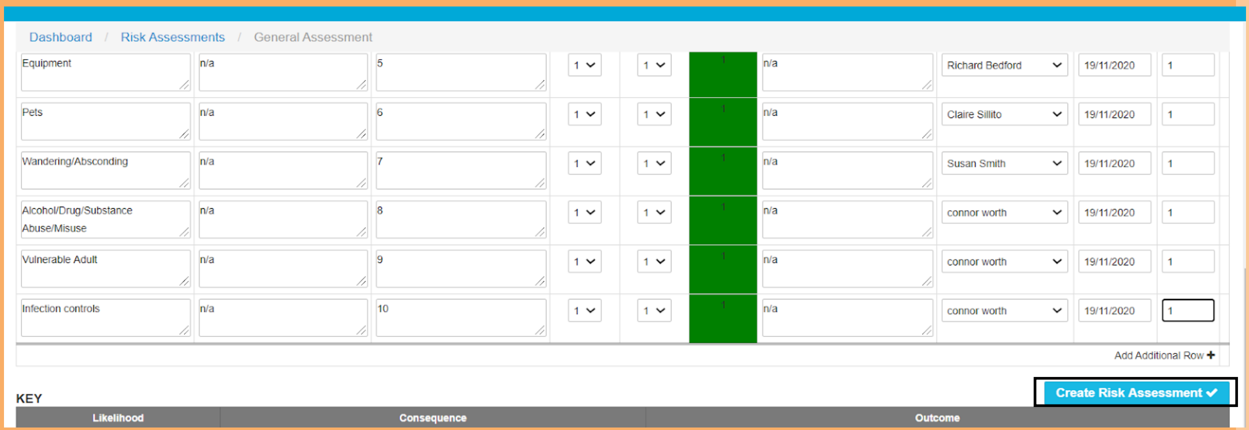
Within CareFor, there are two standard risk assessments available – General and Moving and Handling:



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:



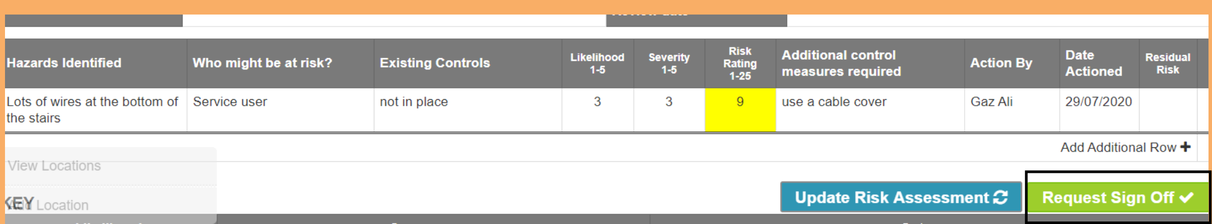
The risk assessment number is auto generated, however if you have previously used risk assessments you are able to overwrite this number. Once you have added all details, you will need to click "Create Risk Assessment".



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.

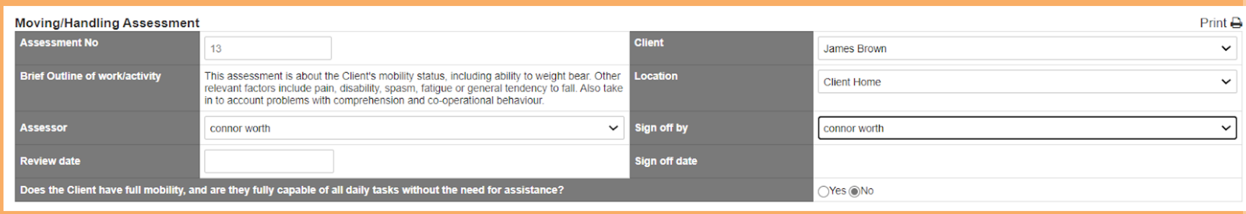
You will also see that prior to sign off, you are still able to edit the initial details of the risk assessment. Please note that once the risk assessment has been signed off these details can no longer be edited.

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



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:



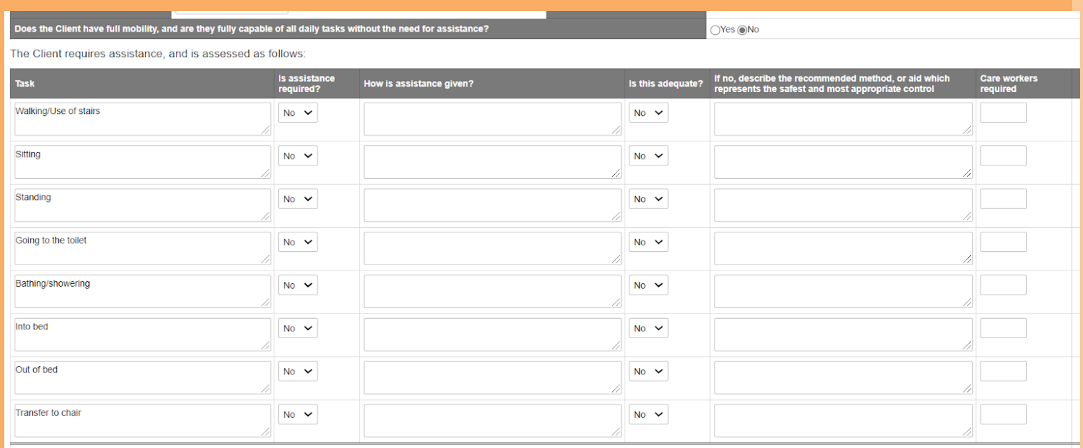
Moving/Handling Assessment

Print

Assessment No	13	Client	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?			Yes 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:



Does the Client have full mobility, and are they fully capable of all daily tasks without the need for assistance? Yes No

The Client requires assistance, and is assessed as follows:

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.

	Assessment No.	Type	Service User	Location	Outline	Review Date	Date Completed
	12	General	James Brown	Service User Home	Mary and carers	20/11/2021	20/11/2020
	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.

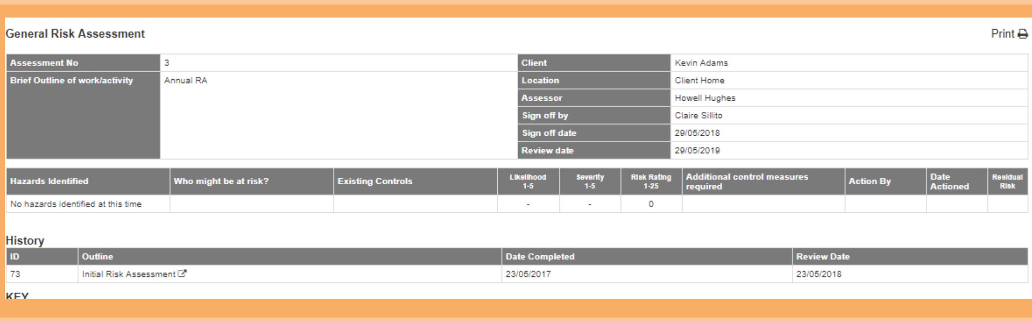
The example below shows an expired risk assessment, you will see next to the Review Date there is an arrow:

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		

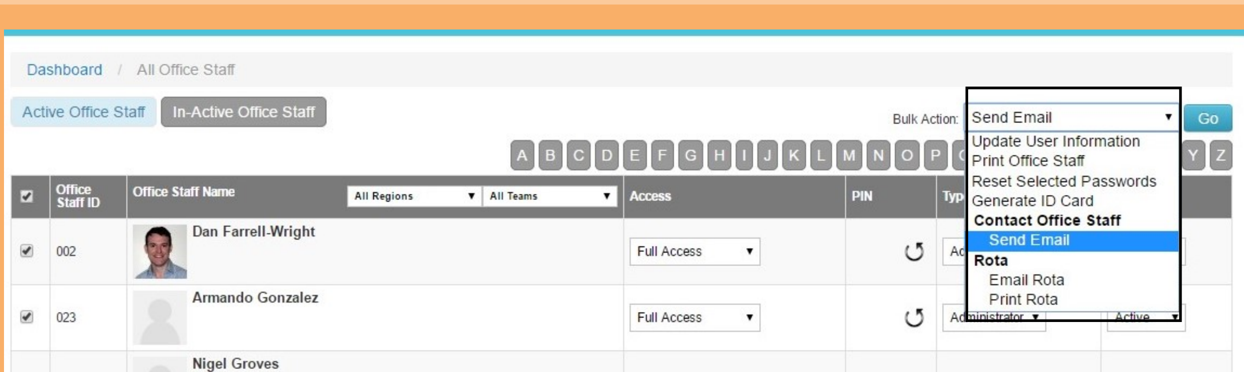
Clicking the arrow takes you to the risk assessment which has been added to replace the out of date one.



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

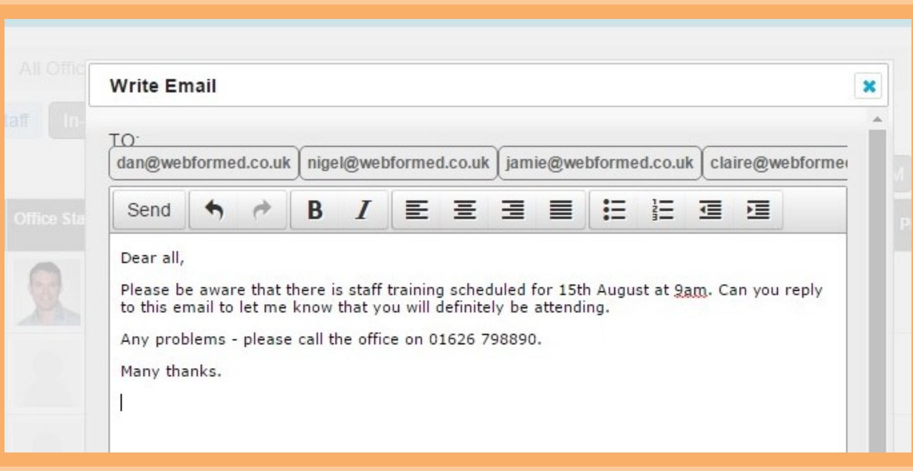
How to Email/Add Attachments to Notes

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'.

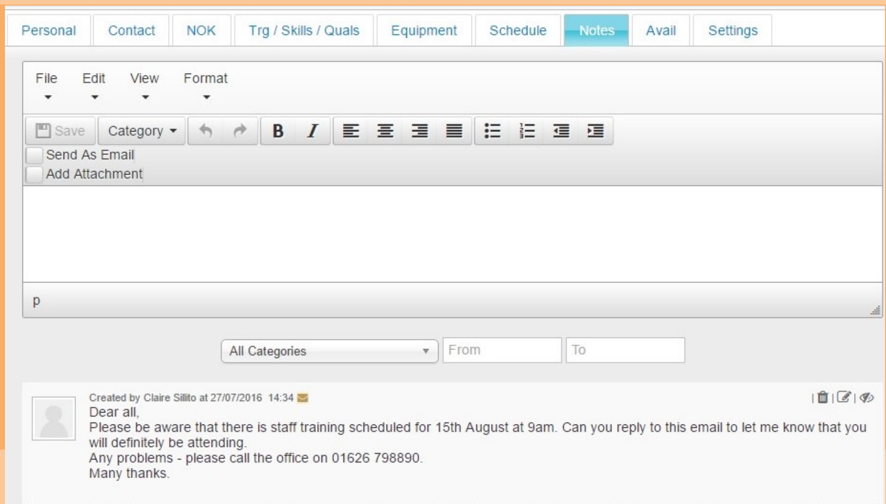


This will then bring up a box allowing you to type the message that you wish to send.

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

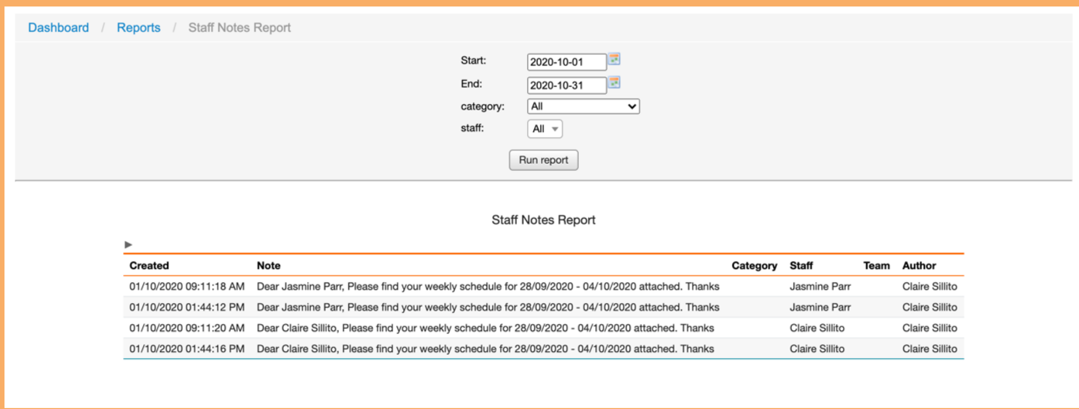


The email will then be sent to the individual's email address. You can also see under the notes section of the staff or carer's profile which emails have been sent to them:



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

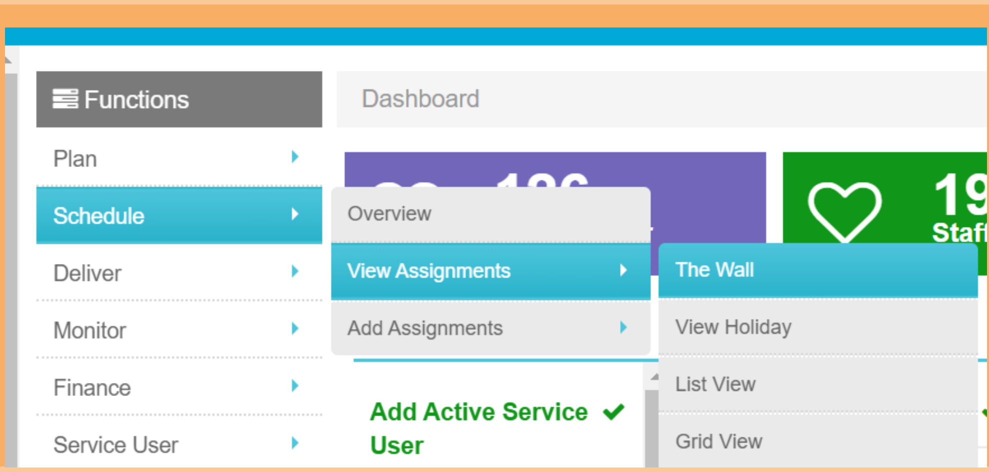
Created	Note	Category	Staff	Team	Author
01/10/2020 09:11:18 AM	Dear Jasmine Parr, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached. Thanks		Jasmine Parr		Claire Sillito
01/10/2020 01:44:12 PM	Dear Jasmine Parr, Please find your weekly schedule for 28/09/2020 - 04/10/2020 attached.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

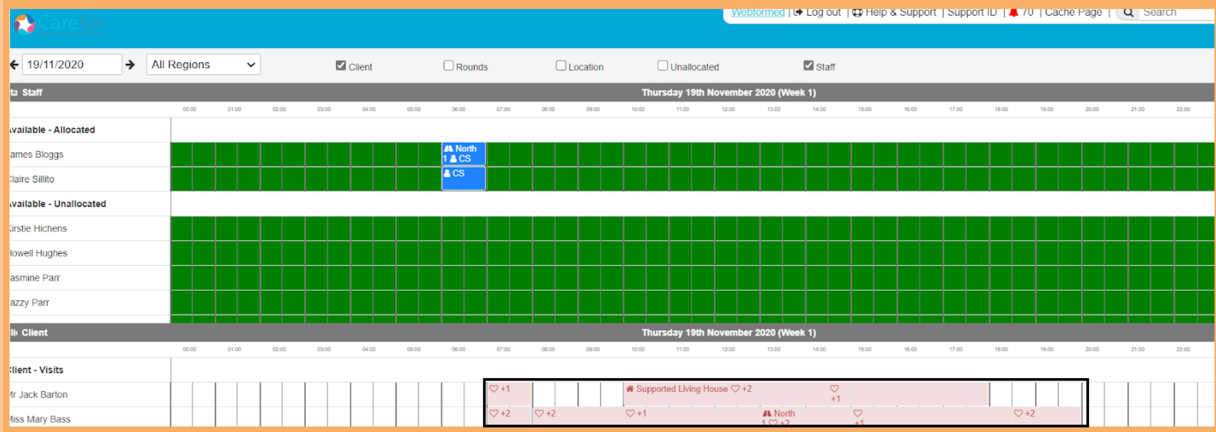
CareFor provides three different options for building your rota. These are 'The Wall', 'The Grid View' and the 'The List View'. Here we'll take you through how to use each one, starting with 'The Wall'.

The Wall

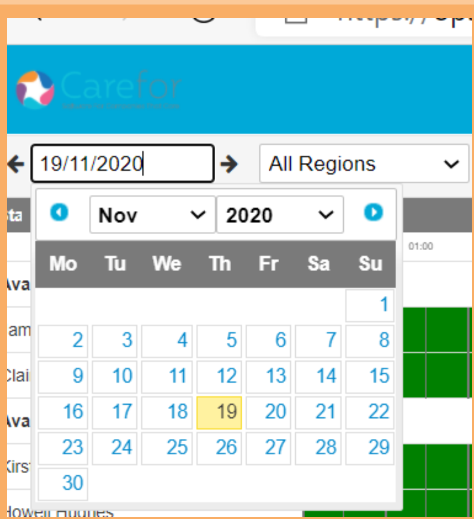
To begin creating your rota, you first need to locate 'The Wall' which is found under the "Functions" menu. Go to "Schedule", "View Visits" and select "The Wall".



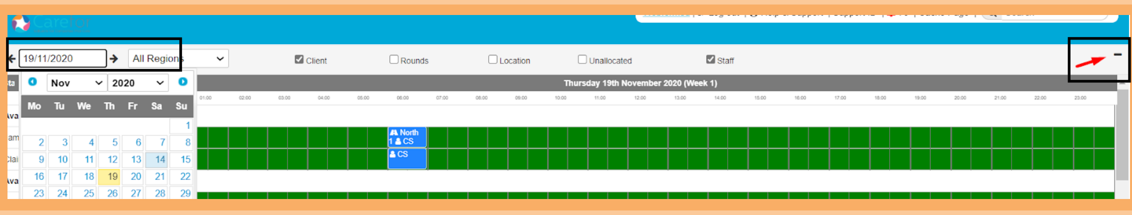
Once you have clicked the wall view you require, you will be taken to "The Wall". (Please note, all unallocated assignments show up shaded pink, any that are already allocated will have the assignment type colour allocated to them:



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:

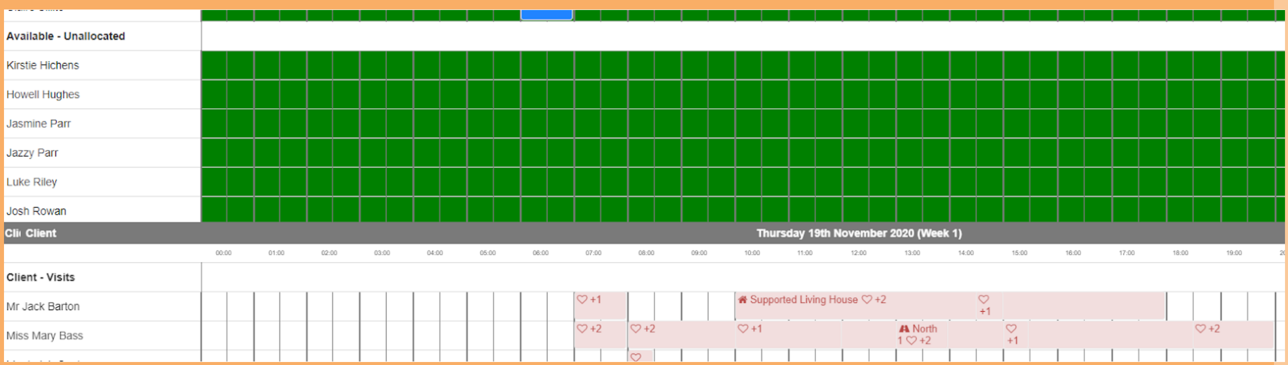


If you work in regions, you can also filter your view by individual regions. You can also change your view from one day to two (or more) by using the minus symbol to the right of the screen:



This will then compact the days. You can press the minus button to zoom out more. Clicking the plus symbol will take you back.

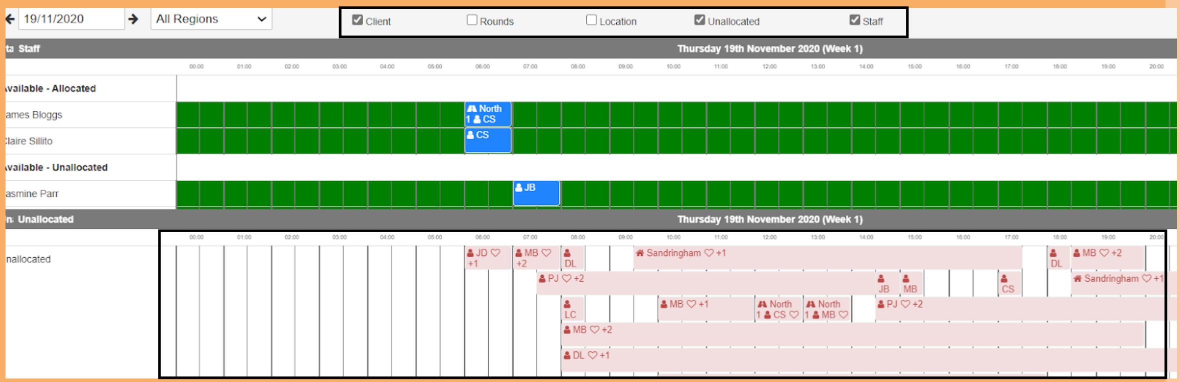
To begin allocating assignments to staff and carers, you will need to make sure that the "Staff" and "Client" boxes to the right of the date and region fields are ticked. Please note, that in order for an assignment to be allocated to a carer they must be showing as available to work.



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:

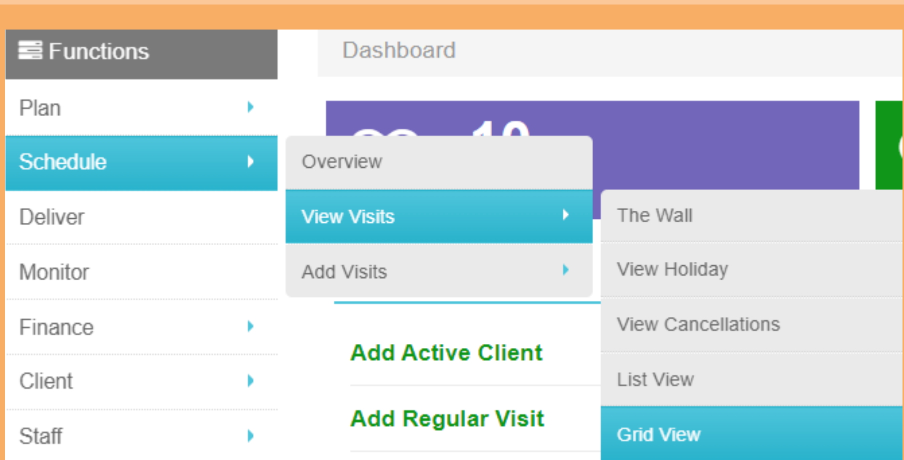
As with allocating a single assignment, you then click into the green area of the carer you wish to allocate the assignments too.

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:

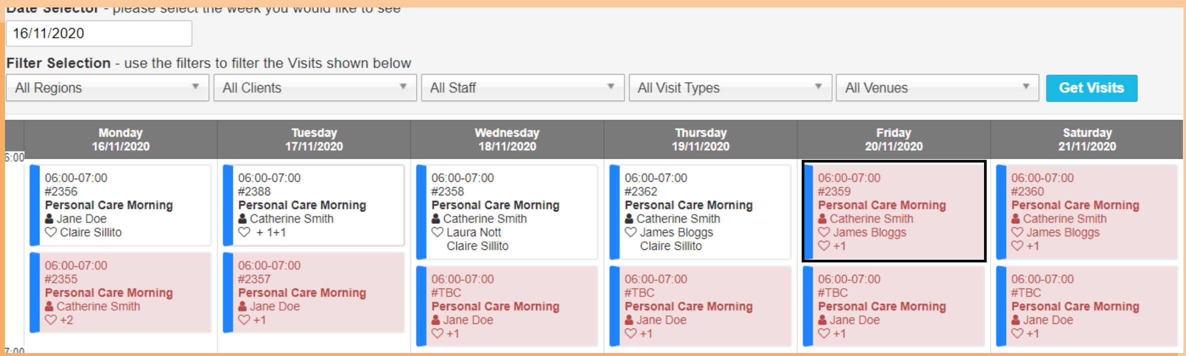


The Grid View

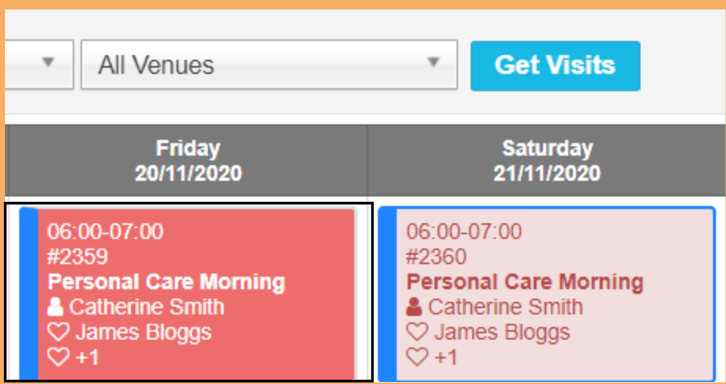
The Grid view is found by going to the “Schedule” tab and going to “View Visits” under the “Functions” menu:



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:



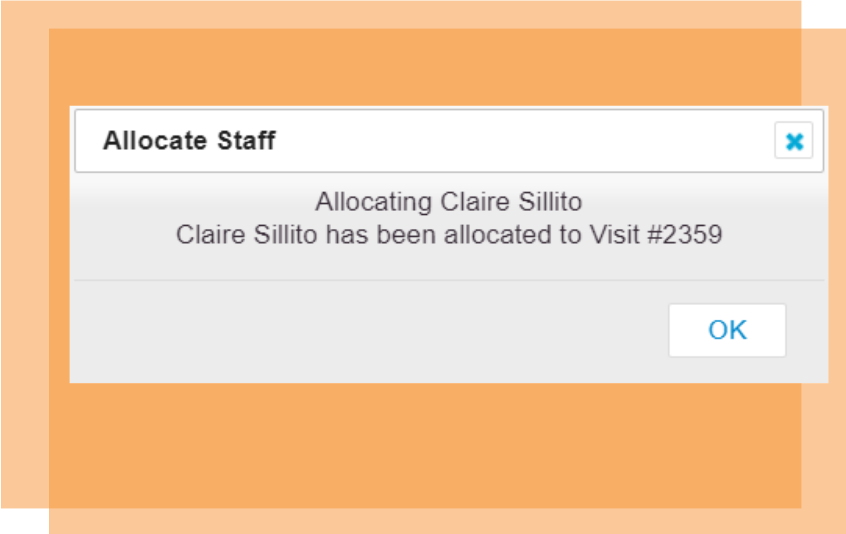
To allocate visits to a carer you need to click each visit once which will change the colour:



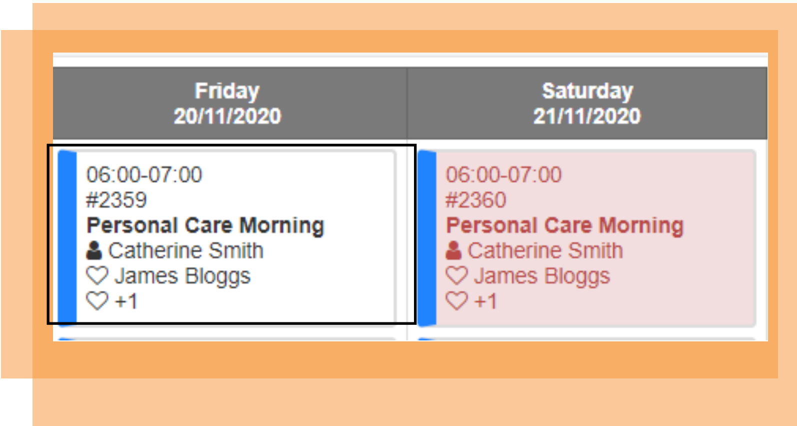
When you have selected all the visits you wish to allocate, click one of the visits again and you will be presented with a pop up which allows you to "Delete Assignments" or "Allocate Staff".

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.

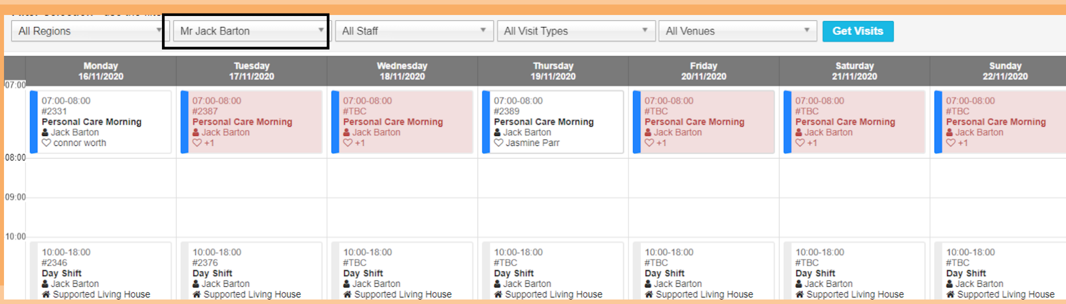
To allocate the visits, select the carer by clicking their name, and this will display the following:



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:

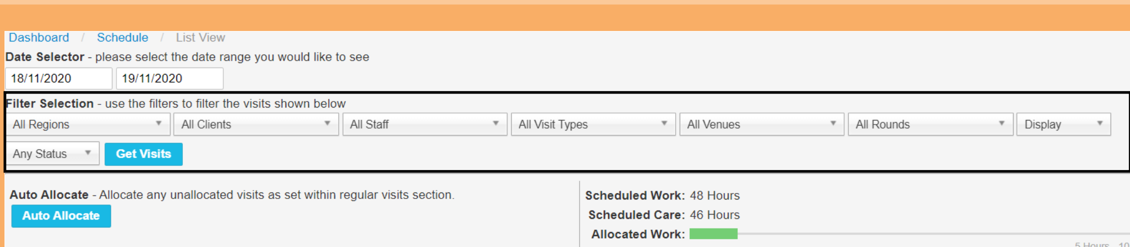


Once you have created your rota for the week, to ensure you do not have any gaps, it is advisable to filter the week by unallocated visits. This option is located within the "All Staff" filter. Click "All Unallocated" and then "Get Visits".

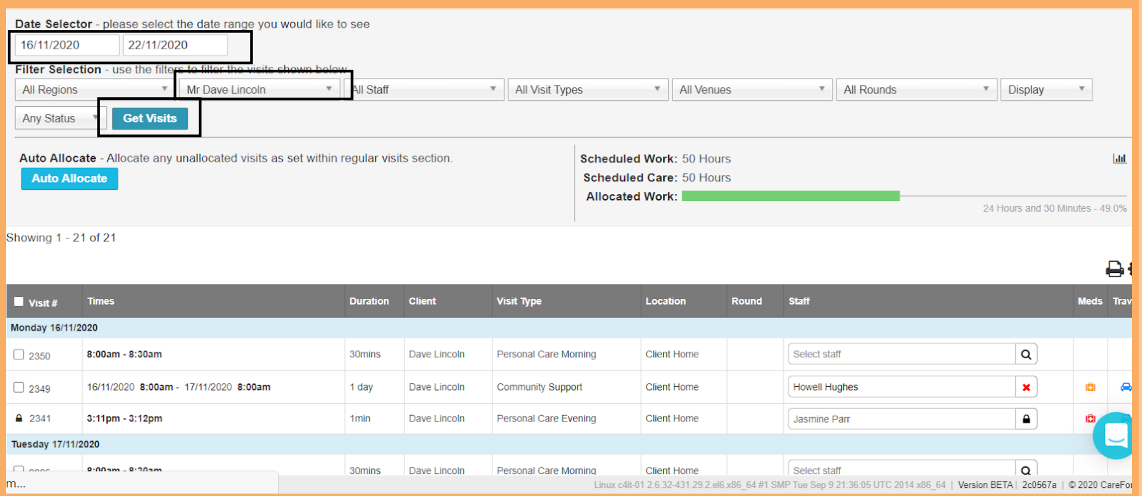
The List View

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

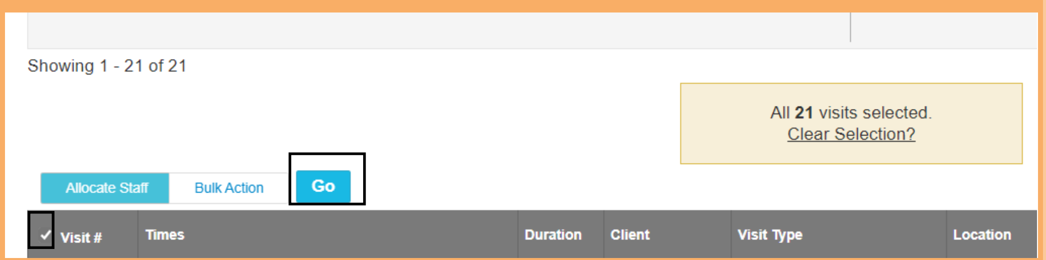
The list view allows you to filter your visits by a date range, and also by other criteria, such as regions and clients, to make it easier to build your rota:



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:



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:

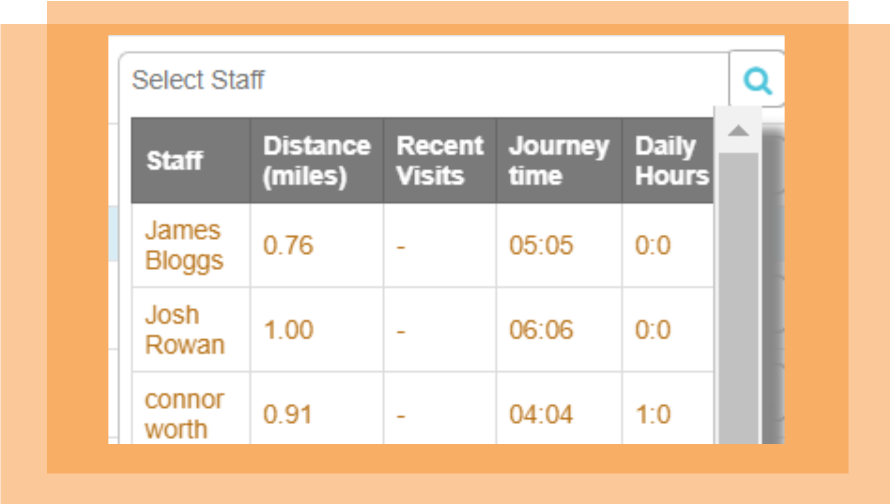


Putting multiple ticks in the 'Assignment #' column will present an **"Allocate Staff" option** above the table, **click "Go"** and CareFor will find available members of staff to fulfill the selected visits.

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.



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

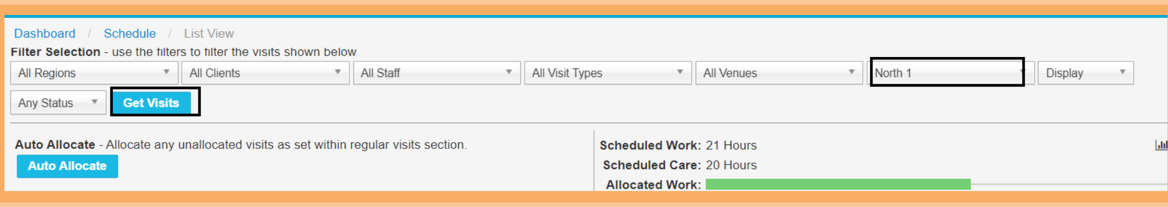
- how long it will take the carer to get there

- 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)

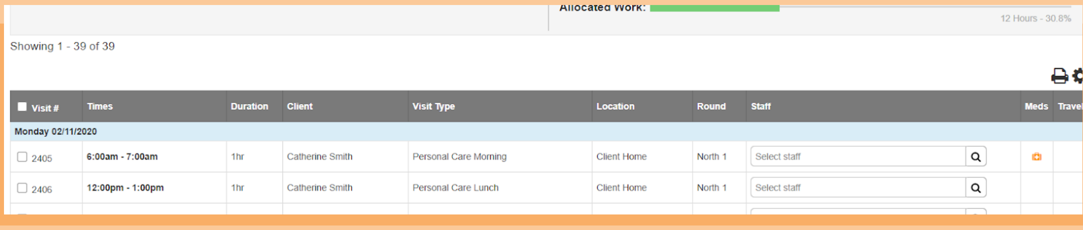
When you have chosen the carer you wish to fulfill the visit, click their name to allocate to them.

Using Rounds – Allocating Staff to Round

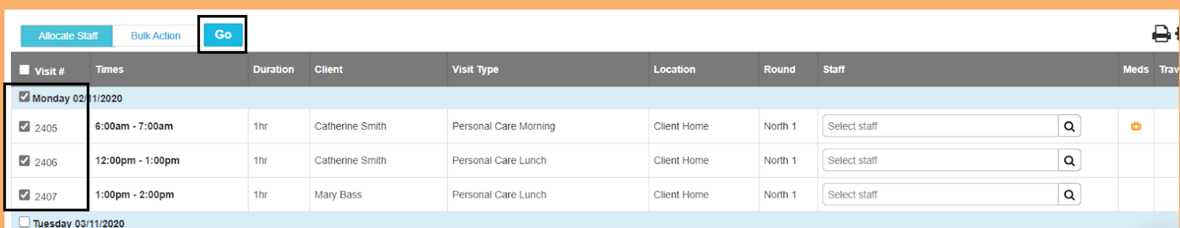
Rounds are allocated to carers on the "List View". Access the "List View" from the "Functions menu", and then choose the date range you wish to allocate.



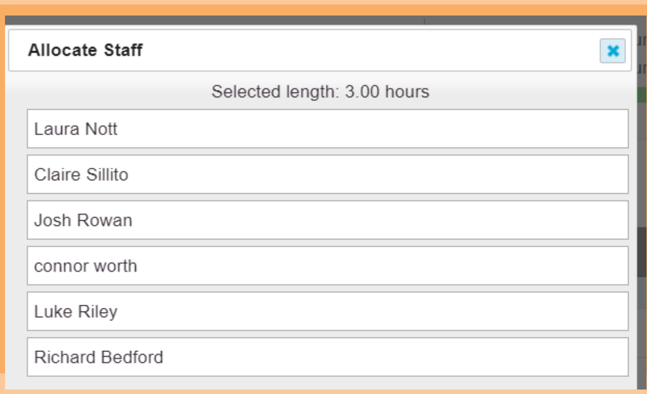
Once you have set the date range, from the rounds drop down, choose which round you would like to allocate and click "Get Visits".



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.



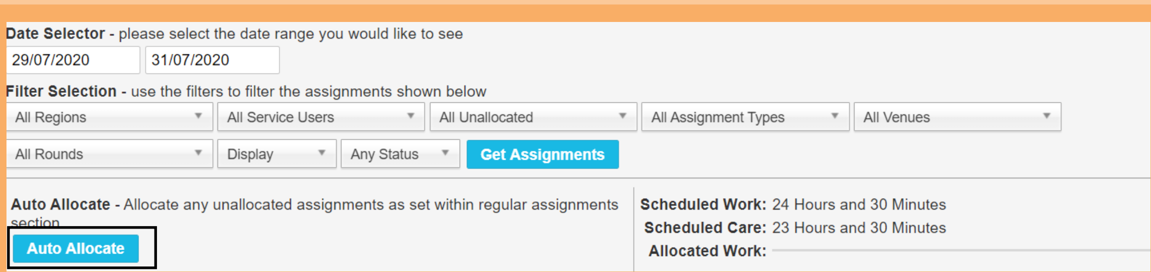
When the pop-up displays, you can select the carer's name that you want to allocate the round to. Click "OK" to confirm the action and the visits will be allocated to the carer.



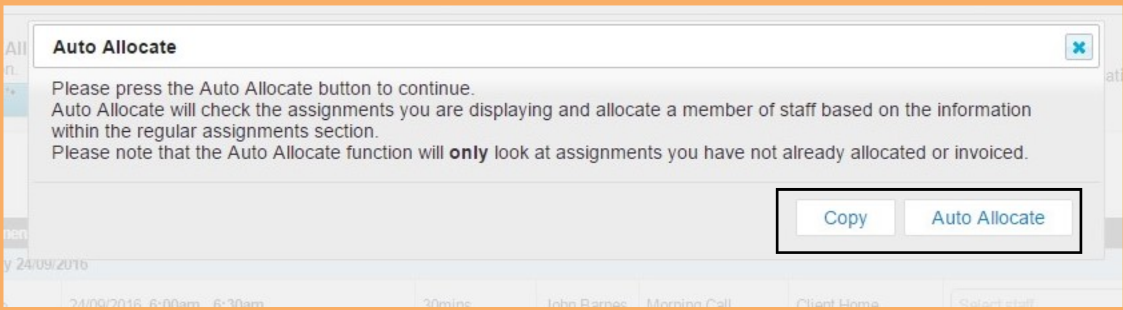
Complete the action repeatedly to fill your rota for the week.

Auto Allocate/Copy Function

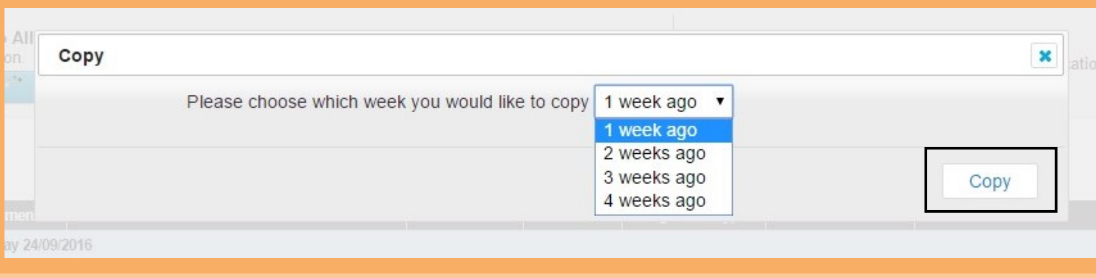
Within the "List View", you also have further options found within the "Auto Allocate" button. The "Auto Allocate" button is found just under the filter selection:



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

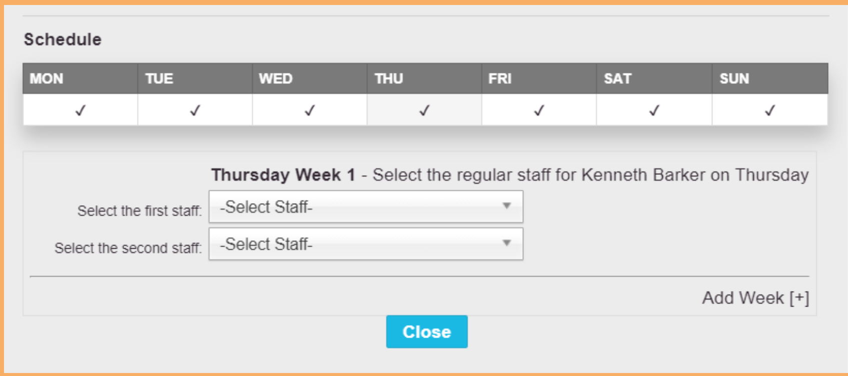


The "Copy" function allows you to copy a previously created rota to the current week. You can copy a rota from up to four weeks ago. We advise you to copy your rota over day by day. Clicking the "Copy" button allows you to choose when you want to copy from:



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.

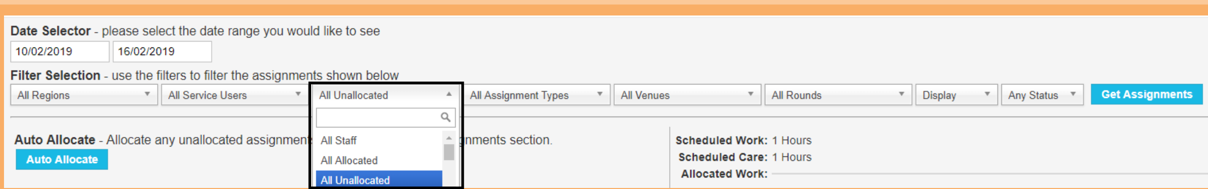
"Auto Allocate" looks at the information on the regular visits and availability. To view which staff member is assigned Monday, for example double click on Monday and select the assign staff button:



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.

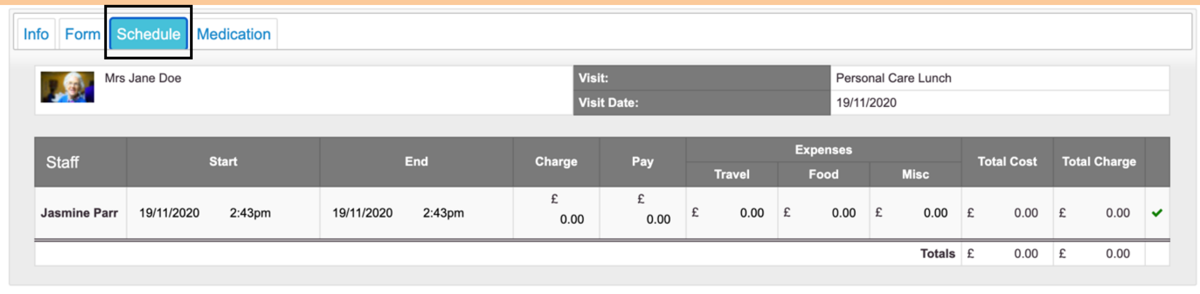
Please note: Once you have completed your weekly rota, it is always beneficial to double check all slots have been filled. The easiest way to do this is to filter by "Unallocated Visits". This option is found in the "All Staff" dropdown:



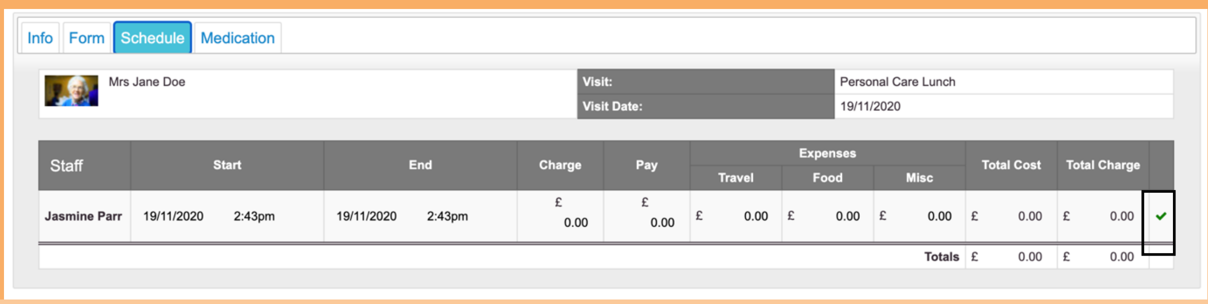
Amending Visits – Unlocking Calls

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

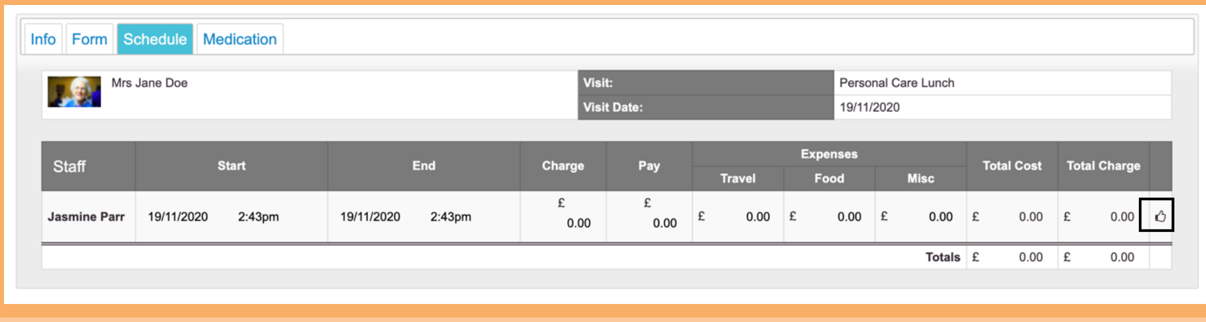
Once you have clicked through to the booking form, you will need to click the "Schedule" tab to unlock the call.



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.



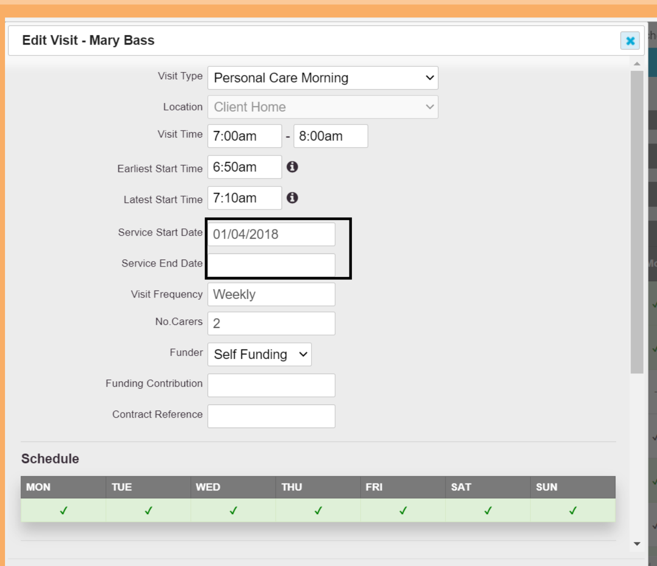
Once you have made the changes, click the thumb up icon and you will then reconcile the call again.



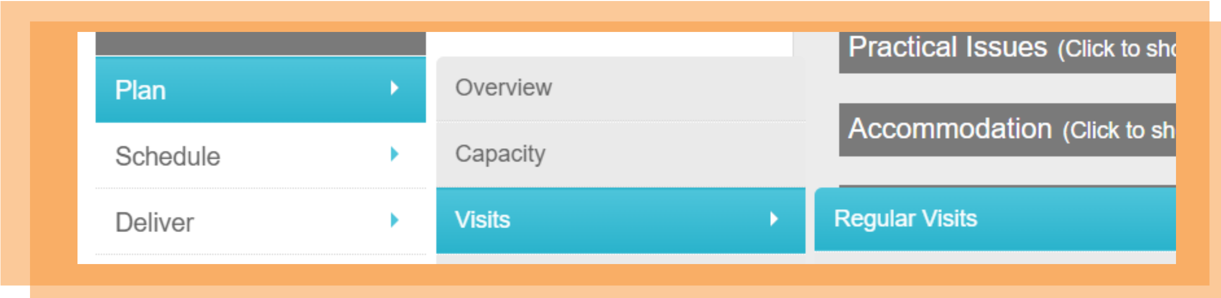
Updating Visits

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

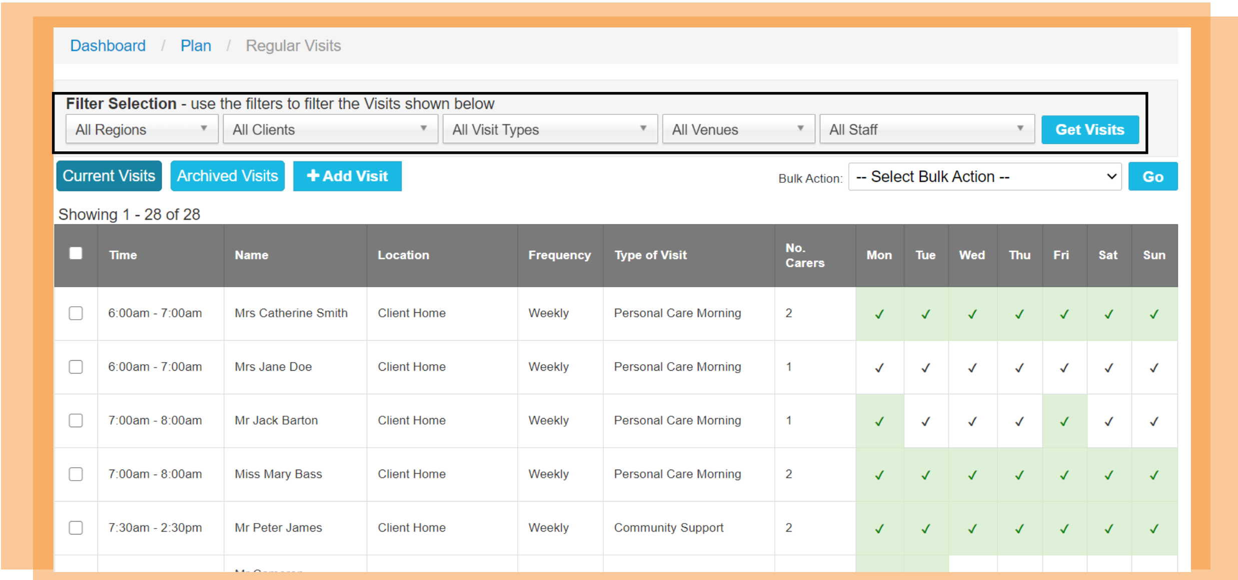
- if you need to change the number of carers associated with a regular visit/service, you will need **to give the current visit an end date**, then start a new visit to allow you to alter the number of carers. You can add an end date to a regular visit by **double clicking on the visit within the client's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



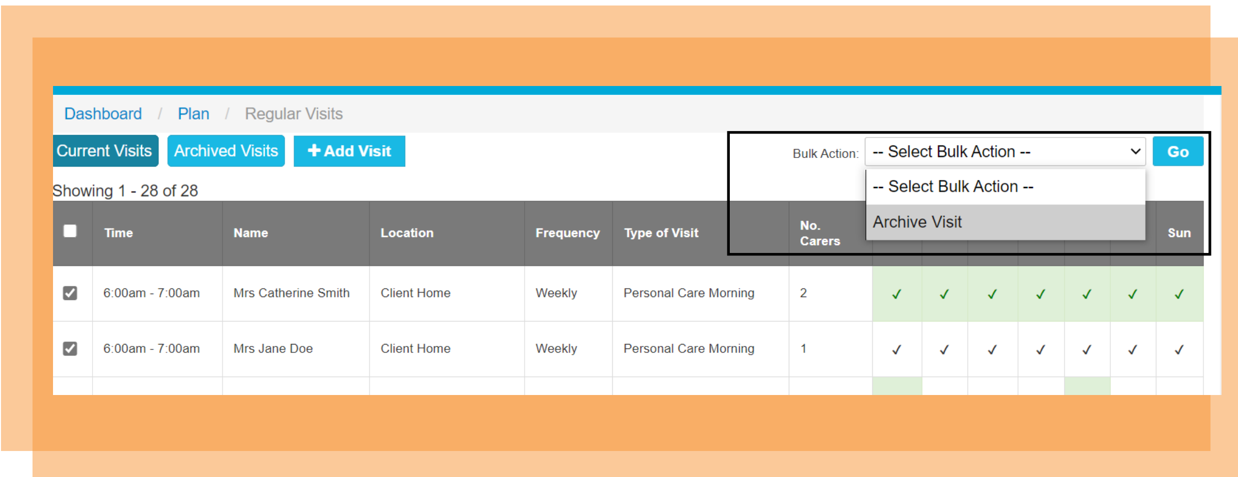
You also have another option to view current regular visits. You can find this by going to "**Plan-Visits-Regular Visits**".



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.



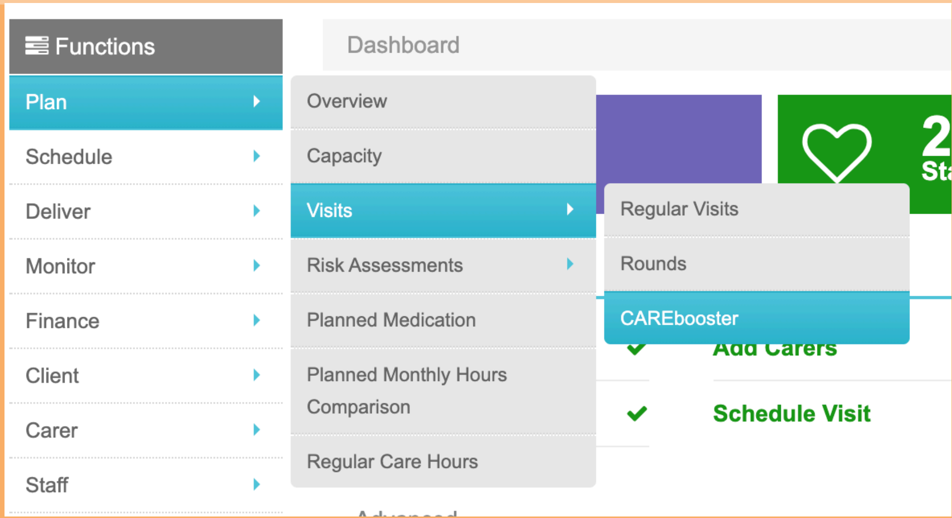
If you like to archive multiple visits, you can **select the tick box next to the visits** and then **select the bulk action menu** and **select "Archive Visit"**.



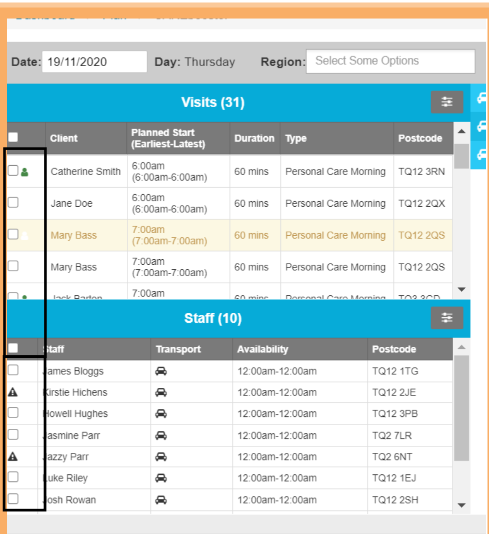
If you access the "Application Log" tab under the "Reports" menu, you will be able to see a log of any changes to bookings, along with the user who made these changes.

CAREBooster

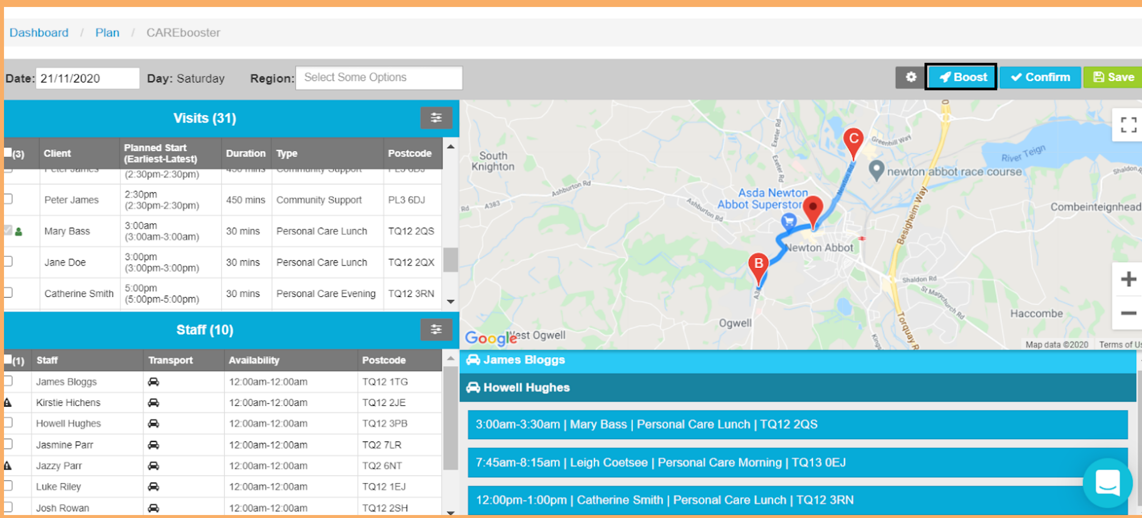
From the "Functions" menu go to "Plan", then "Visits" and select "CAREBooster". Now select the date you'd like to create a route for.



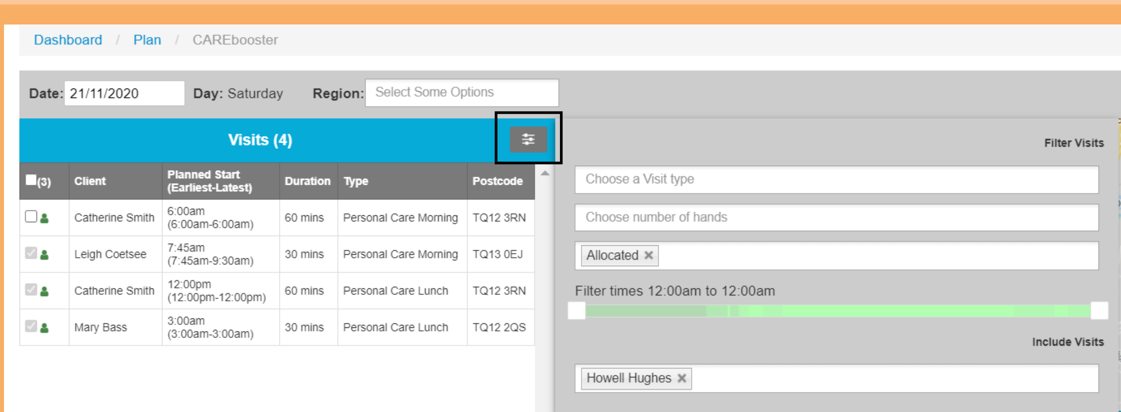
On the left hand-side select both the visits and the staff members you'd like to allocate the visits to.



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



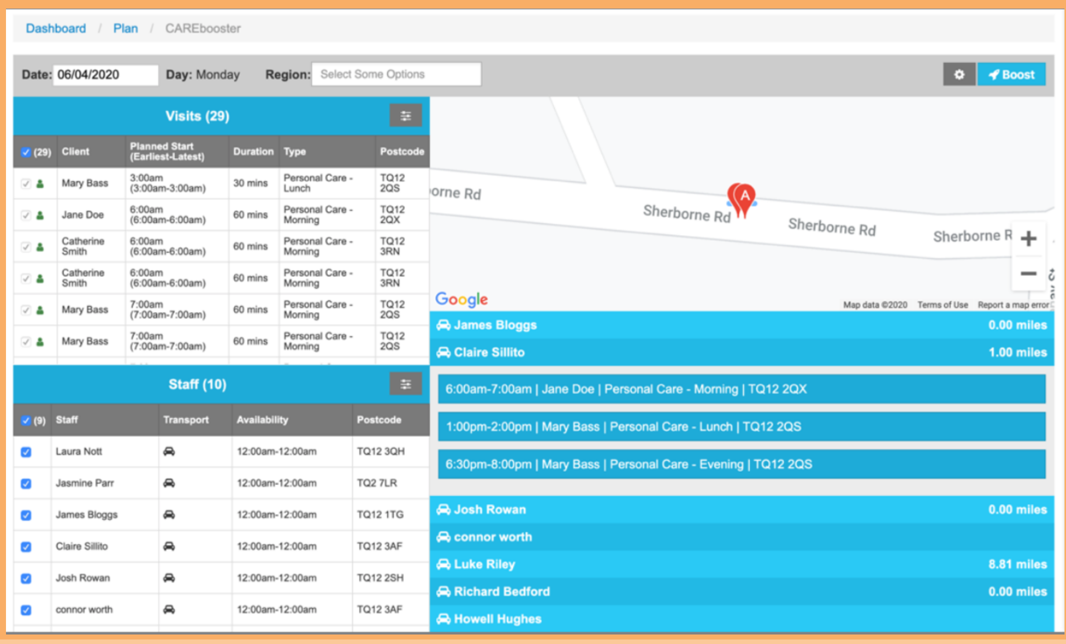
Once created, you should then be able to see the planned journey for your selected staff and the allocated visits. **Clicking and using the filter button functionality** next to the visits gives you the option of filtering by visit times, visit types, whether a call is allocated, and the number of hands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



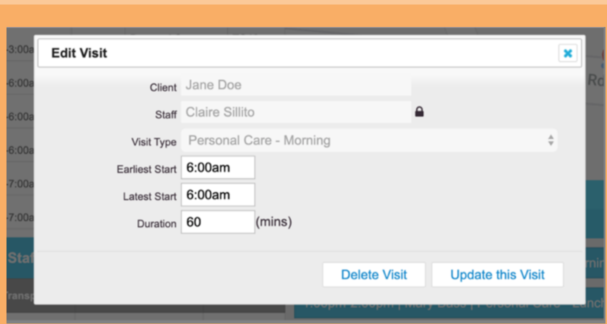
When you have finished planning all your routes, **click confirm** and CAREBooster will have efficiently allocated your visits to staff members for that day.

Filling Gaps with CAREBooster

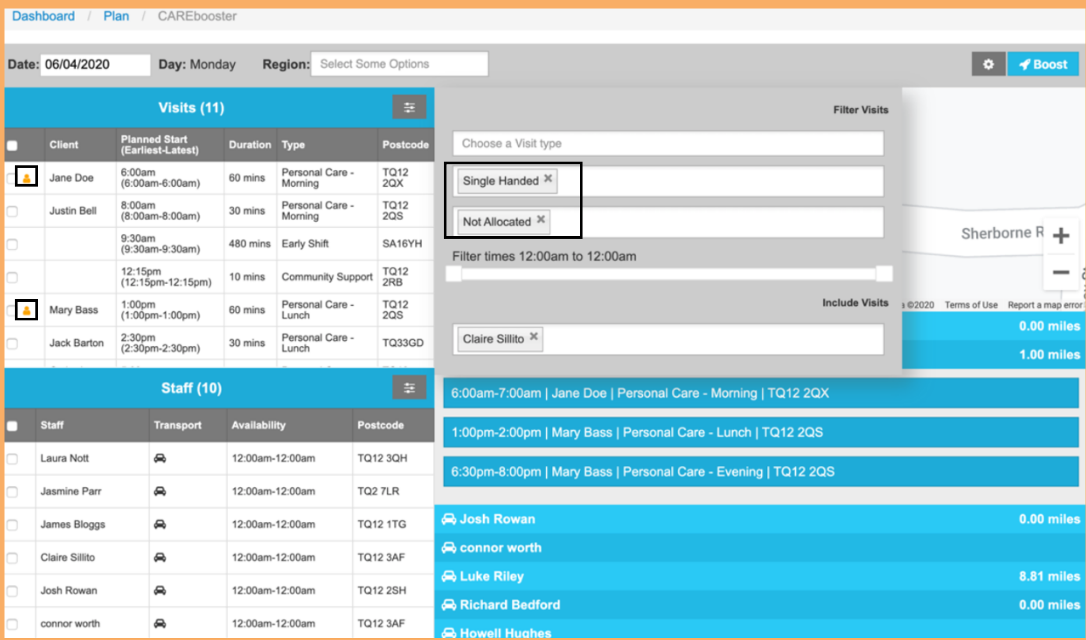
You can now use CAREBooster to fill any gaps between your carer's visits, meaning more care can be sufficiently delivered. Here you can see Claire has a free 4-and-a- half-hour window before her 6.30pm call is due to start. Let's see if we can allocate more visits to Claire.



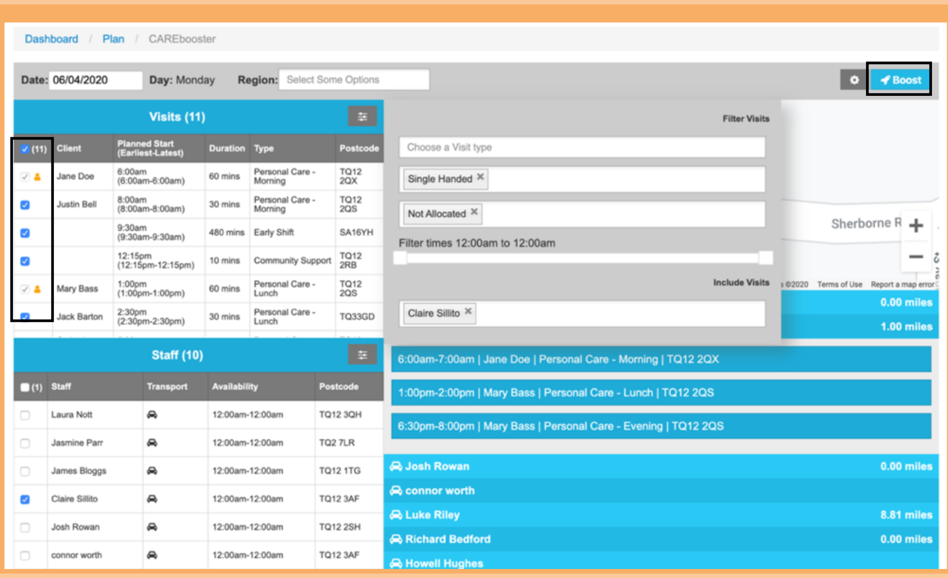
To do this, you will firstly have to **select the visit rows** that are already allocated to Claire, and lock these calls:



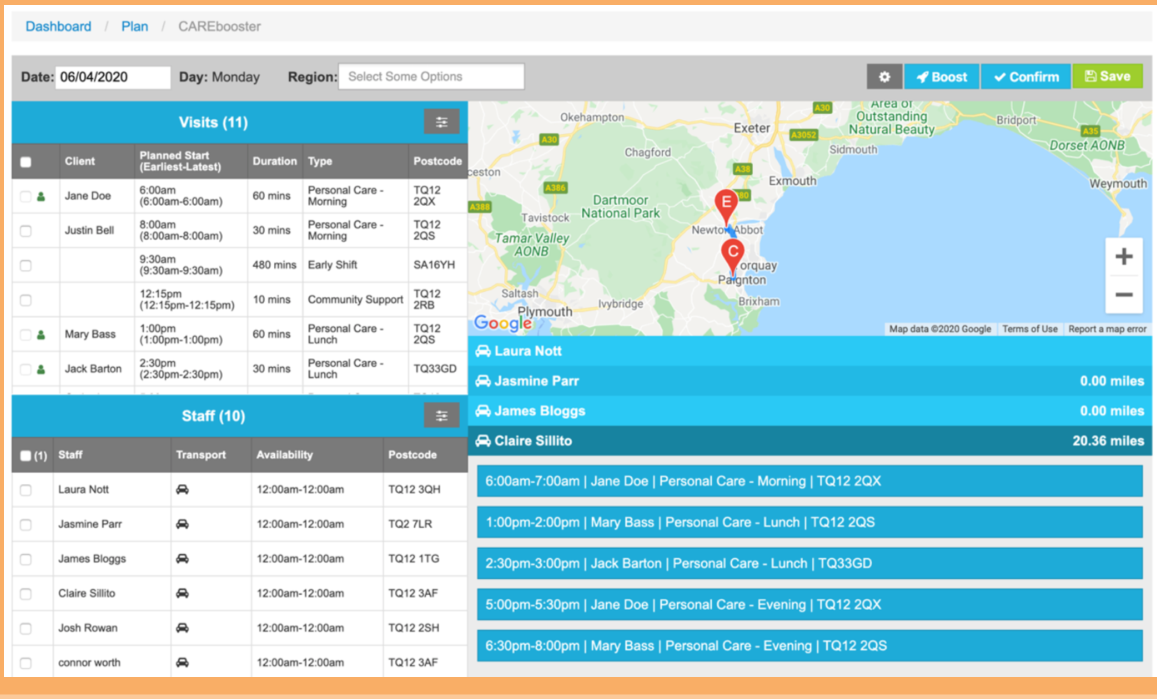
The allocated visits should now show in orange. This ensures that CAREBooster does not remove Claire from these visits (although the visits can be moved in time). Now **use the filters to try and fit in the gaps**, here we have filtered by single handed calls which are currently unallocated to Claire.



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

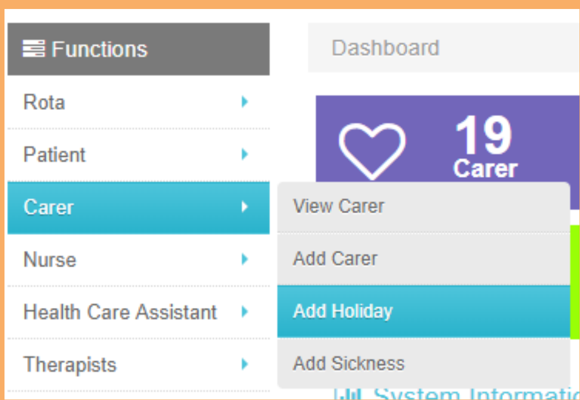


CAREBooster has now allocated a further two visits to Claire.

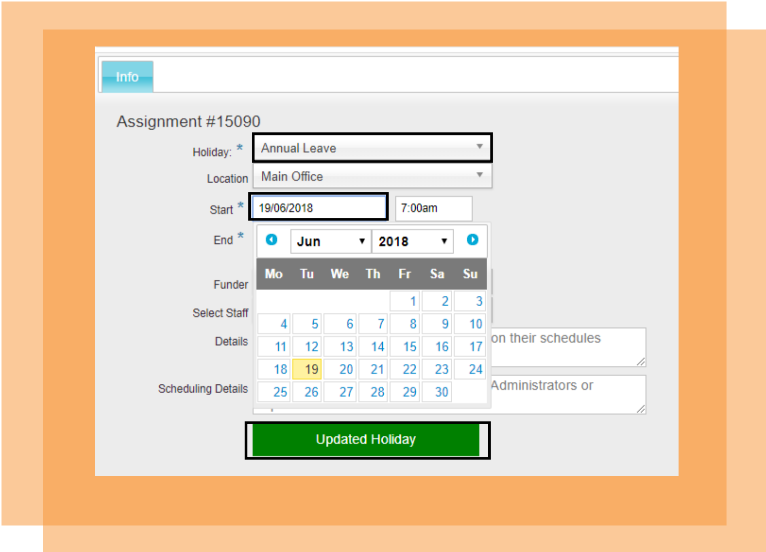


Adding Holiday

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



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



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.

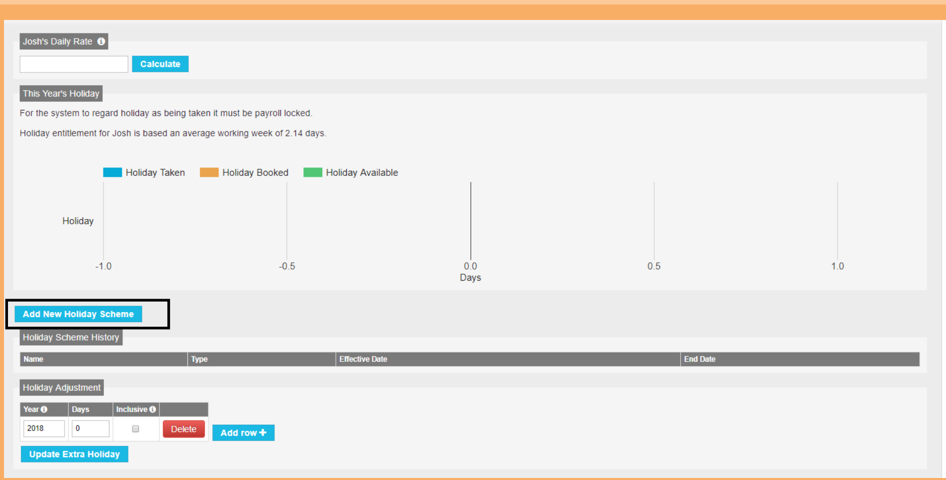
Once the start and end times have been added, you can then select the staff member to assign to the holiday and the appropriate funder.

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

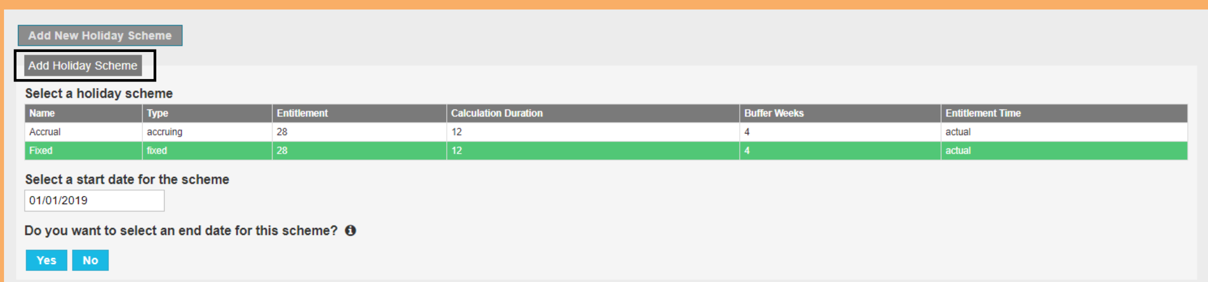
Please note, if a staff member has a holiday scheme set up all days will be counted as full days regardless of the length of holiday taken and holiday will need to be entered for each individual day taken.

Setting Up A Holiday Scheme

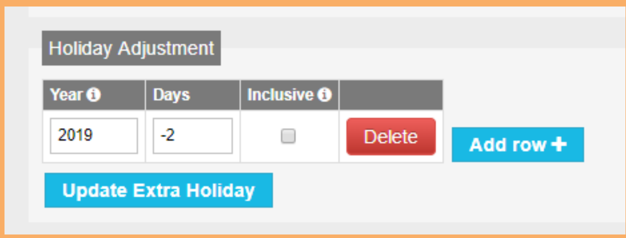
To set up a holiday scheme for staff you will need to go to the **staff members profile and click into the "Holiday" tab**:



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

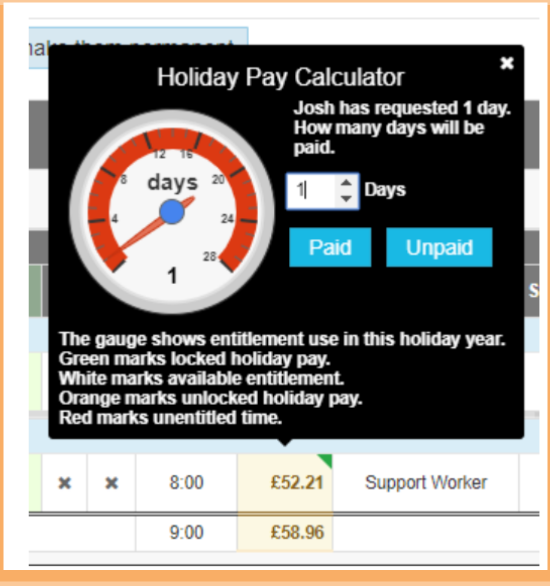
Once a holiday scheme has been set within a staff member's profile, it also needs to be configured within the assignment types in CareFor. This can be done using the following steps:

- 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".

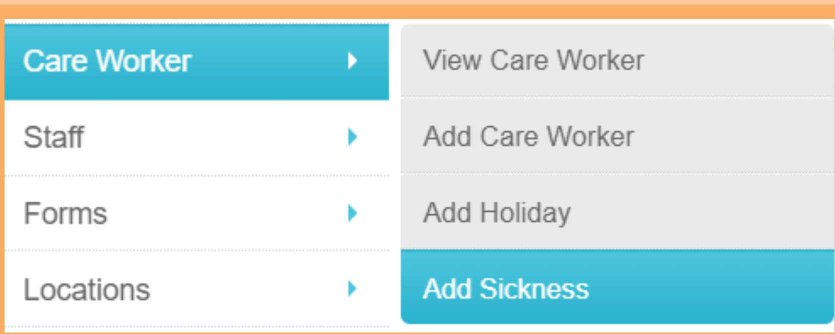
Visit types that accrue holiday will be used in the calculation to work out how many days a staff member has accrued. If you do not want a visit type to accrue holiday these options would need to be unticked.

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:

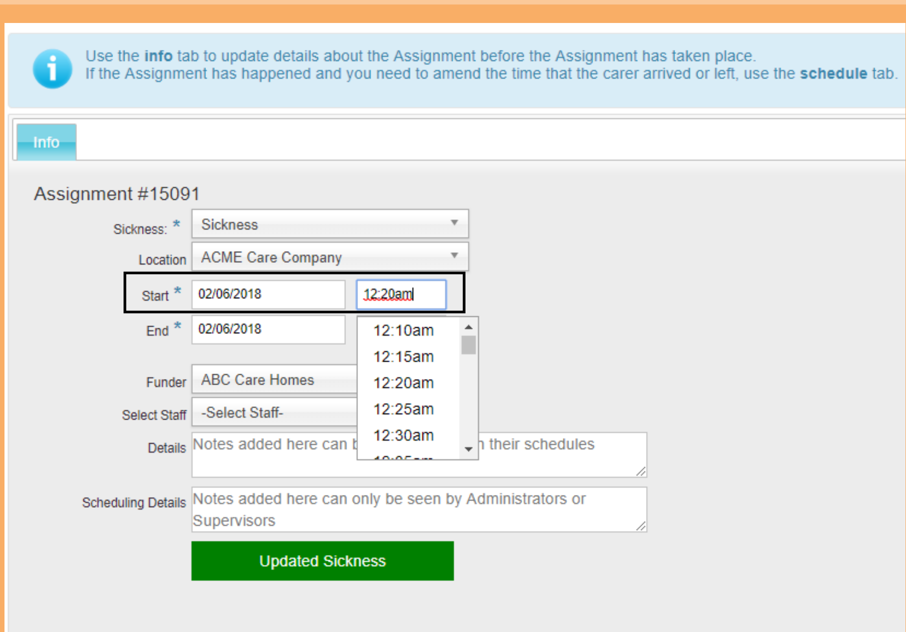


Adding Sickness

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:



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"**.

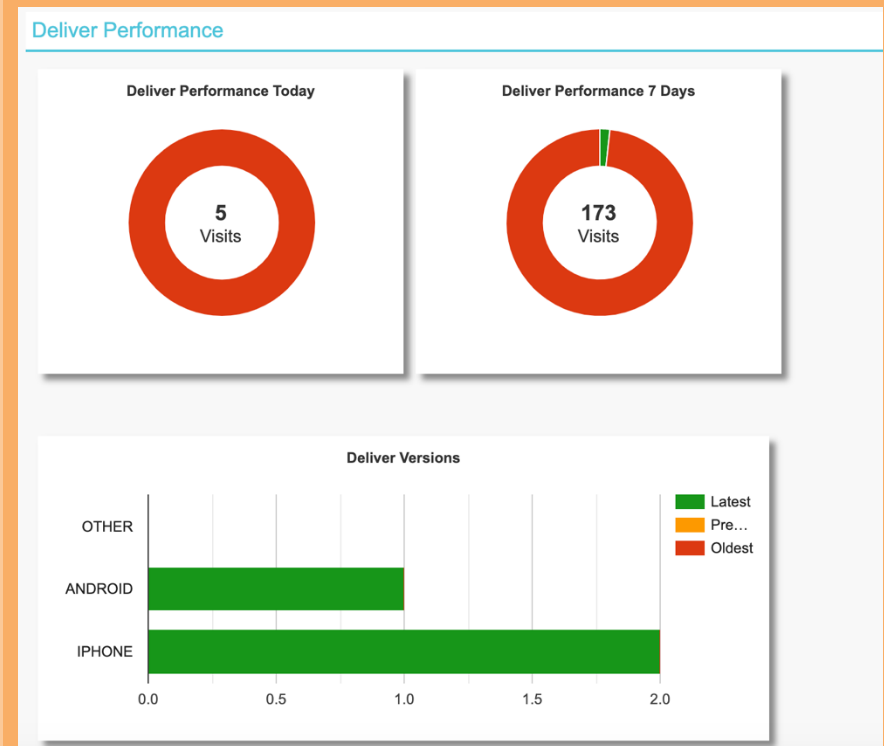
You can add further details to the sickness within the **"Details"** and **"Scheduling Details"** section of the sickness form.

Deliver

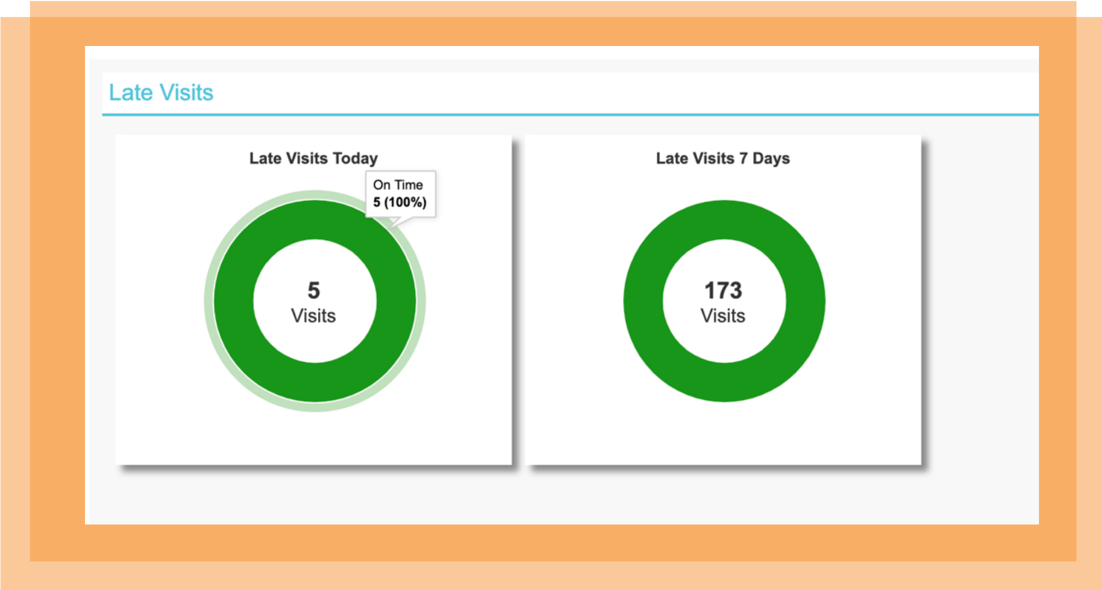
Overview Screen

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

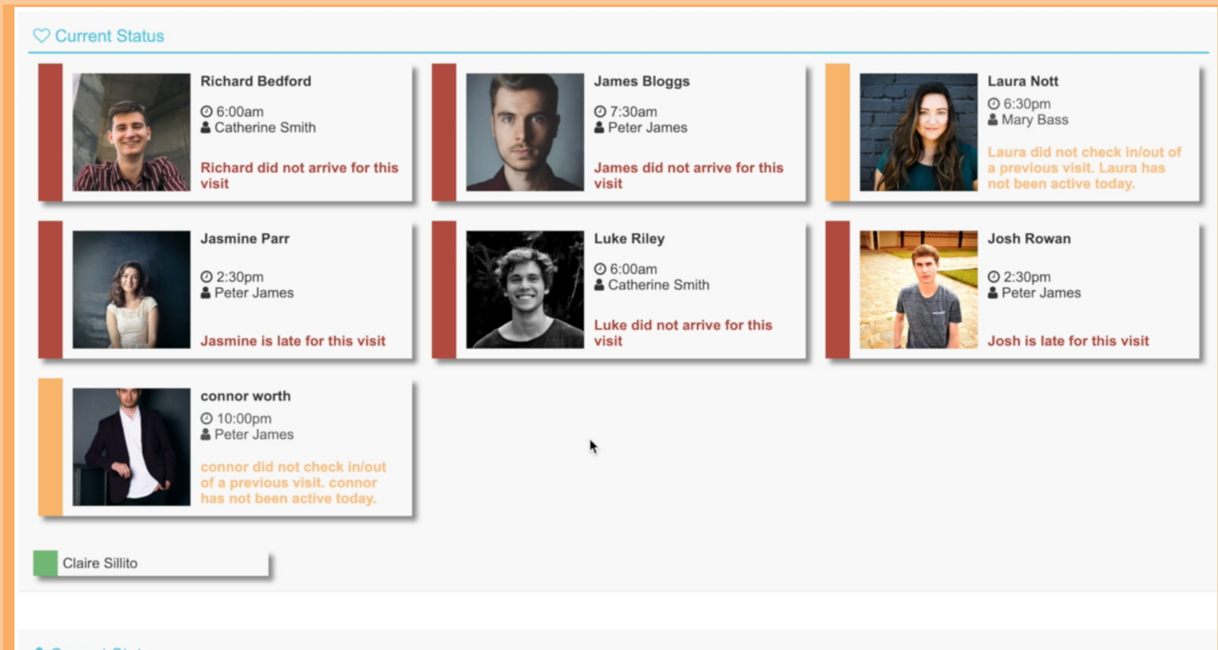
Our CareFor Carer app gives your carers all the tools required to deliver exceptional care at the tip of their fingers. Enabling them to check in and out of calls, record medication administration, fill out forms and complete notes. Please see the Carer training pack for an explanation of the app.

Monitor

Monitor Overview

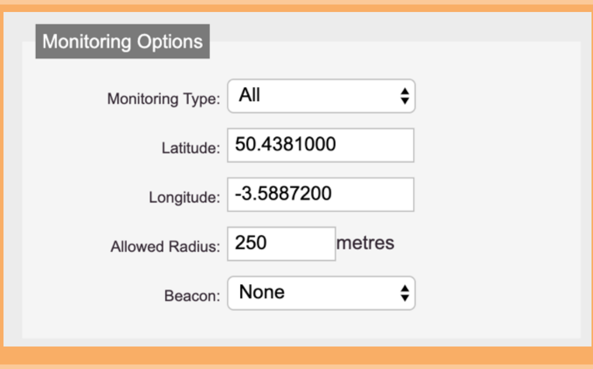
The monitor overview retrieves real time information from the CareFor Carer App to enable you to monitor your care delivery and make alterations accordingly.

- 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.



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.

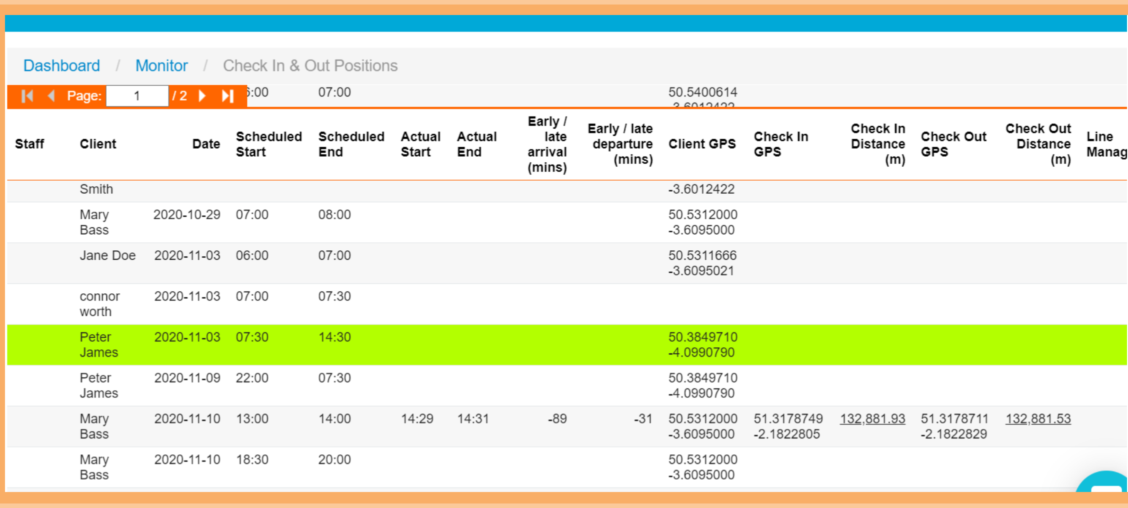
Within the 'Property' tab of a client's profile, ensure that within the "Monitoring Options" a "Monitoring Type" is selected:



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.

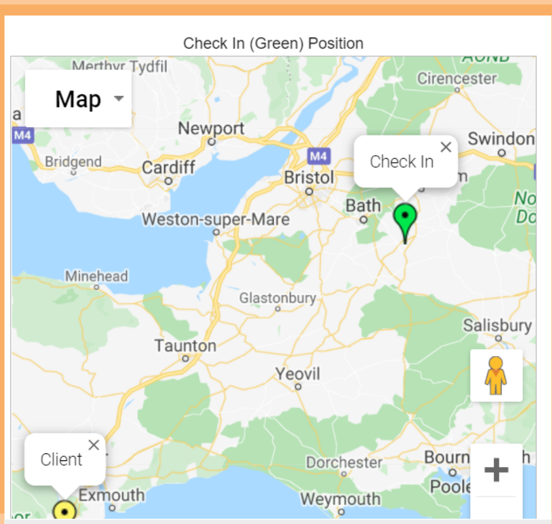
Once the report has been run you will notice the check in/out columns have distances which are underlined:



Dashboard / Monitor / Check In & Out Positions

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								-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	132,881.93	51.3178711 -2.1822829	132,881.53	
	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:

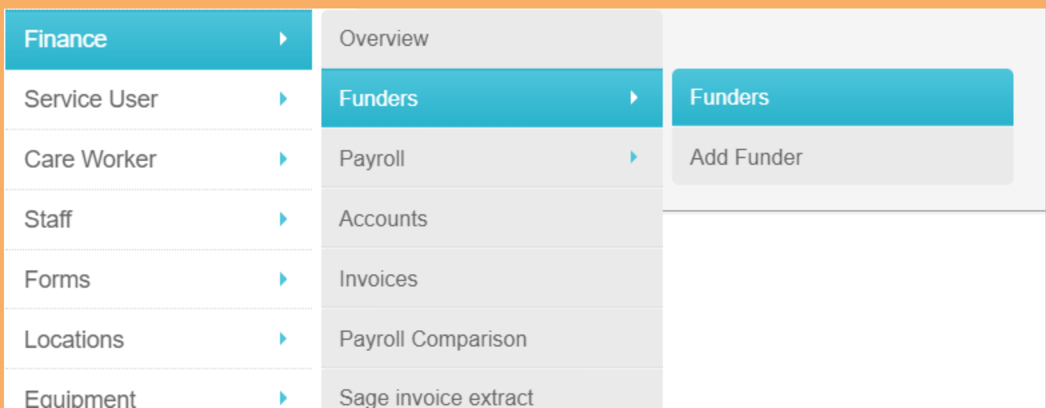
Barton, James	Rowan, Josh	23/05/18	Wednesday	06:00	07:00	60	06:00	07:00	60	Morning Call	06:00	07:00	60	0	0
		23/05/18	Wednesday	06:00	07:00	60	06:00	07:00	60	Morning Call	06:00	07:00	60	0	0
	Rowan, Josh	24/05/18	Thursday	06:00	07:00	60	06:00	07:00	60	Morning Call	11:14	12:14	60	0	-314

Payment

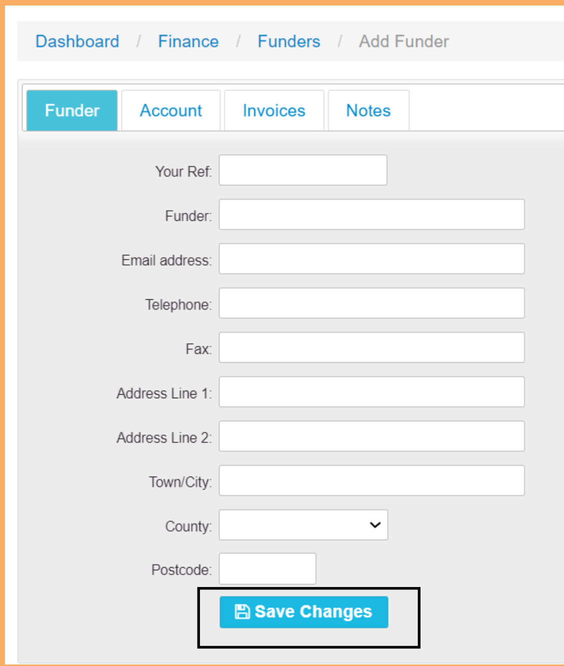
Using Funders

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:



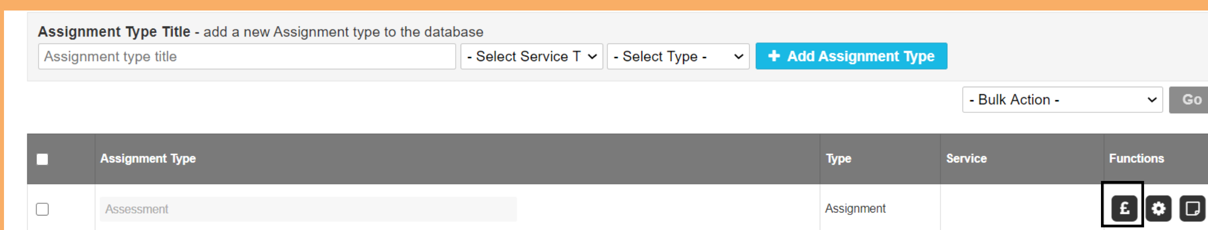
Fill out the details for the funder you wish to add. The "Your Ref" field will be where you enter the unique identifier used for the funder to recognise your company. Once you have entered the details, click "Save Changes".



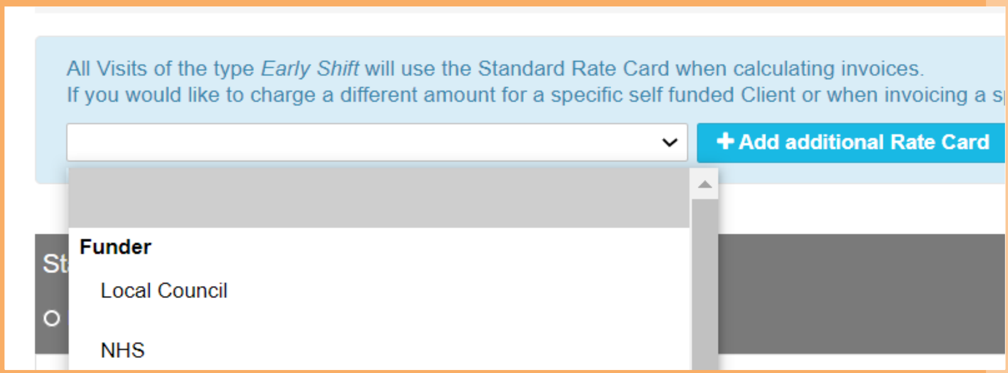
You will need to add each funder in turn to CareFor. Once you have added funders you can add the details to the relevant clients, and also create rate cards for specific funders.

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:

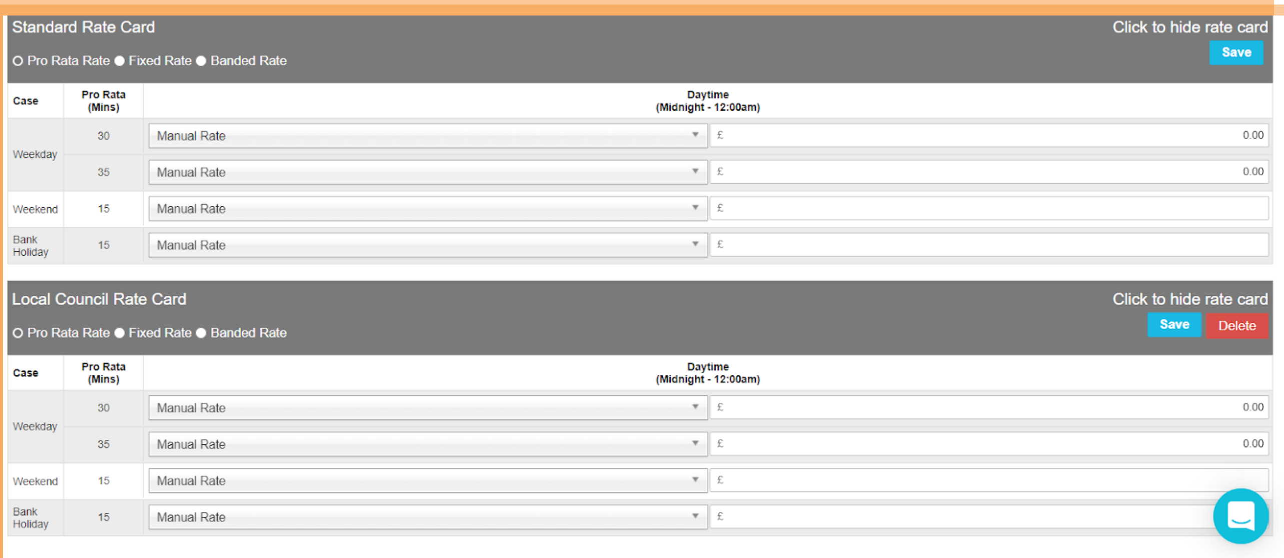


Once you have clicked the pound symbol, you will need to select the grey box which says "Select Client/Funder" – this will then drop down to reveal all the funders and clients you have entered into CareFor:



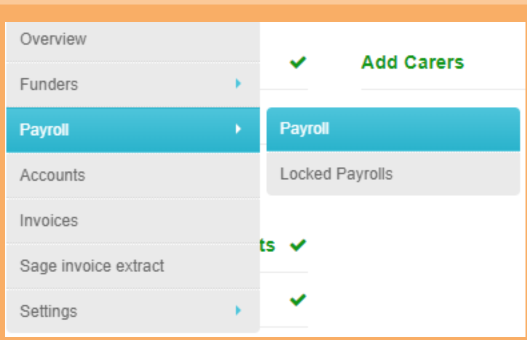
You need to select the funder from the list and then click the "Add Rate Card" button, this creates the rate card for you, and you can then input your variable or standard rates.

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

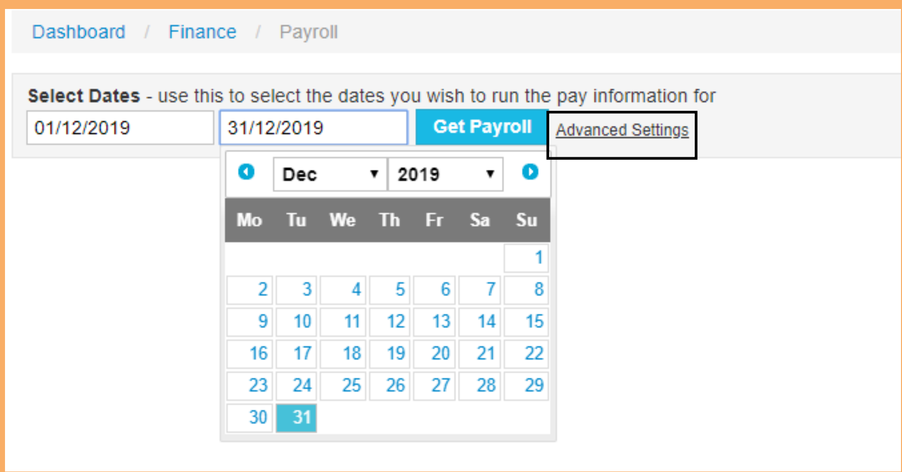


Running Payroll

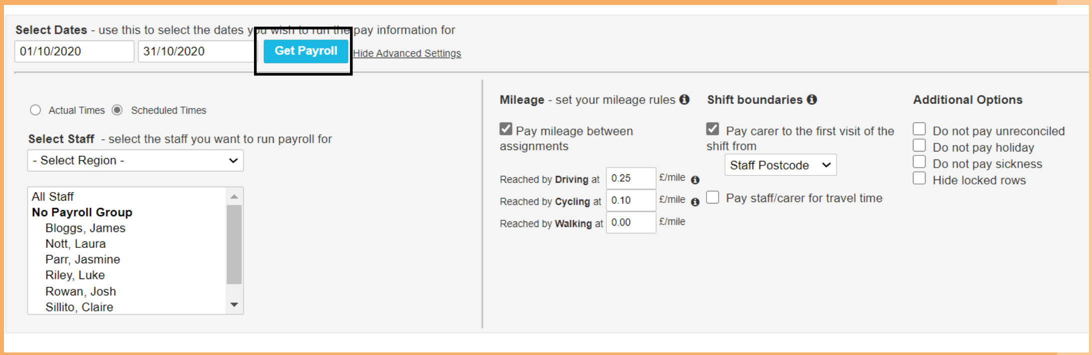
You can locate the payroll by choosing the "Finance" tab under the "Functions" menu, and clicking "Payroll":



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:



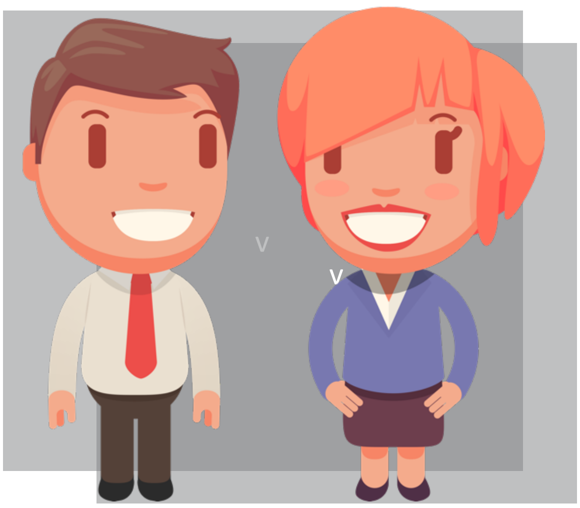
The Advanced Settings allow you to:

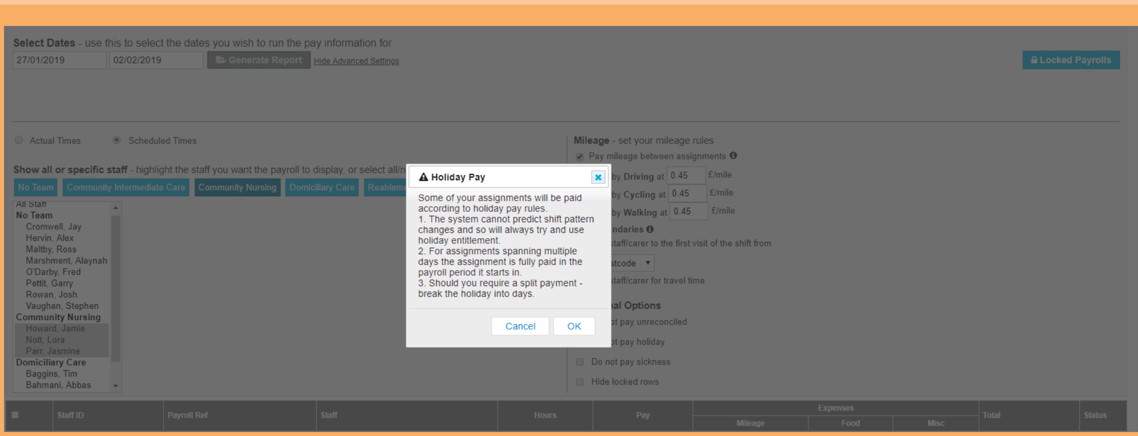
- Choose whether to pay for "Actual" or "Scheduled" times. If "actual" times are selected, you can tick to cap at scheduled pay.

- 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: Mileage	Expenses: Food	Expenses: Misc	Total	Status
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	

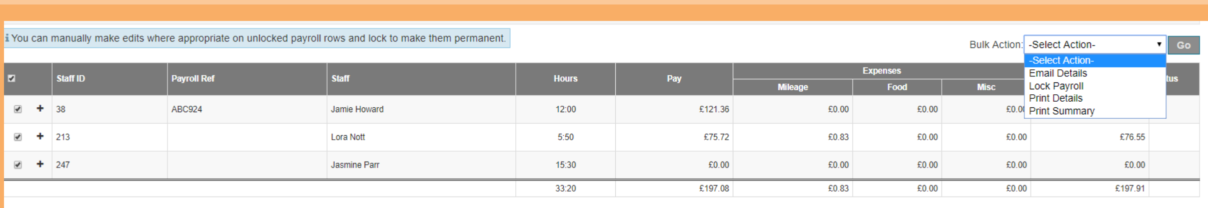
Assignment	Service User	Type	Times: Scheduled		Times: Actual		Length	Pay	Job Role	Journey: Start	Journey: End	Journey: Miles	Journey: Type	Journey: Travel Time (mins)	Travel Pay	Expenses: Mileage	Expenses: Food	Expenses: Misc	Total	Status
Thursday 31/01/2019																				
112479	Stacey Moore	DOM - Personal Care	8:00am	8:10am	11:09am	11:10am	0:10	£4.40	Carer - Level 2		TQ122QS	0.00		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		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		0 (6)	£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		0	£0.00	£0.00	£0.00	£0.00	£5.00	
112510	John Sainsbury	DOM - Personal Care	3:30pm	4:30pm	✗	✗	1:00	£12.00	Carer - Level 2		**TQ156LX**	0.00		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		0	£0.00	£0.00	£0.00	£0.00	£9.00	✓
112500	George Pritchard	DOM - Personal Care	6:05pm	6:35pm	✗	✗	0:30	£6.00	Carer - Level 2	TQ121TG	TQ122QS	0.76		6	£1.00	£0.34	£0.00	£0.00	£7.34	
112489	Nadeen Batty	DOM - Personal Care	8:30pm	9:30pm	✗	✗	1:00	£12.00	Carer - Level 2		TQ122EA	0.00		0	£0.00	£0.00	£0.00	£0.00	£12.00	
Saturday 02/02/2019																				
112482	Stacey Moore	DOM - Personal Care	7:00am	8:00am	✗	✗	1:00	£12.00	Carer - Level 2		TQ122QS	0.00		0	£0.00	£0.00	£0.00	£0.00	£12.00	
112484	Stacey Moore	DOM - Personal Care	9:00am	9:15am	✗	✗	0:15	£3.42	Carer - Level 2	TQ122QS	TQ122QS	0.00		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.

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 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:

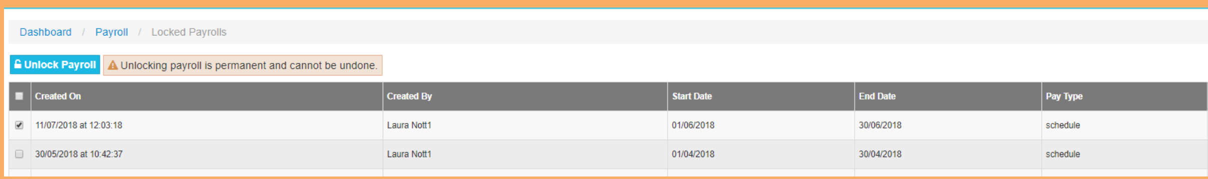
- Email Details - this will email a copy of the payroll report details to the carer/staff member.

- 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”**.



Paying Holiday

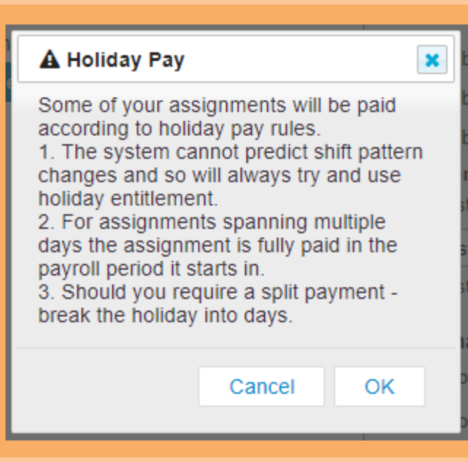
In order to pay holiday, you need to ensure the following are in place;

- The visit type accrues holiday.

- A holiday scheme is set up for the staff member.

- Have previously locked payroll data on CareFor.

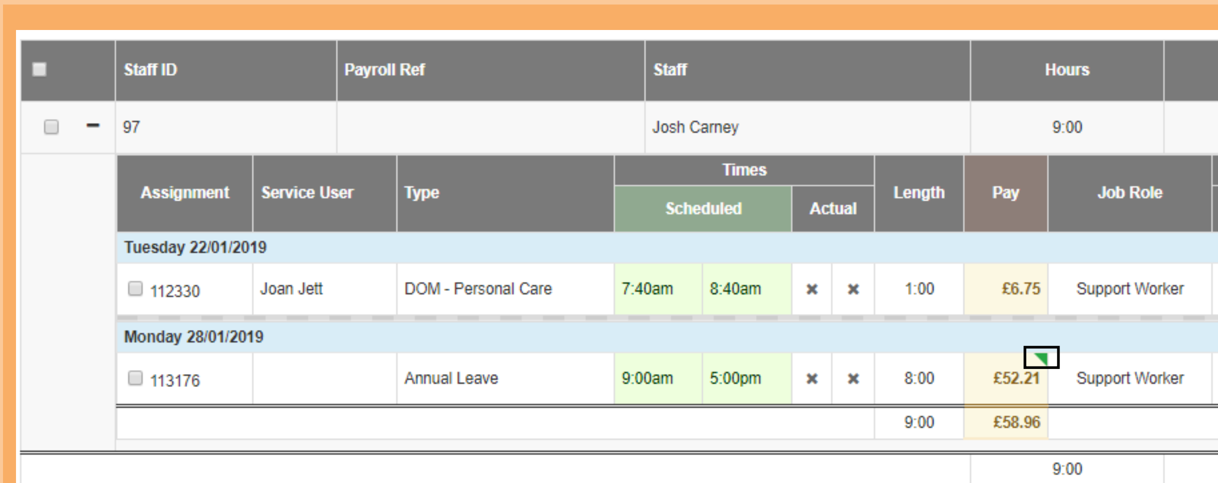
When you run the payroll report, if holiday has been booked for that period this will show within the report.



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:



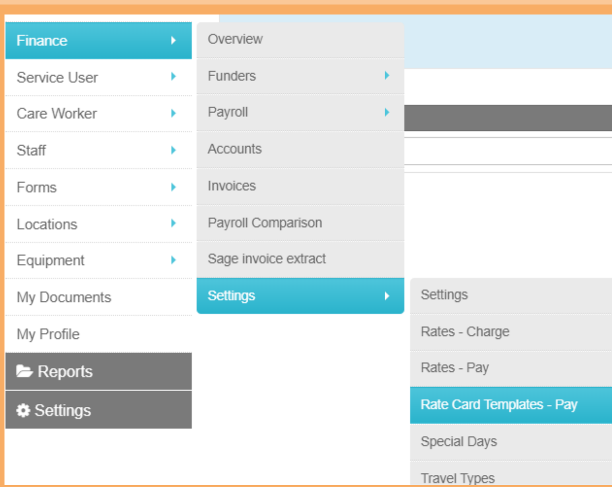
Staff ID	Payroll Ref	Staff	Hours
97		Josh Carney	9:00

Assignment	Service User	Type	Times Scheduled		Times Actual		Length	Pay	Job Role
Tuesday 22/01/2019									
112330	Joan Jett	DOM - Personal Care	7:40am	8:40am	✖	✖	1:00	£6.75	Support Worker
Monday 28/01/2019									
113176		Annual Leave	9:00am	5:00pm	✖	✖	8:00	£52.21	Support Worker
							9:00	£58.96	

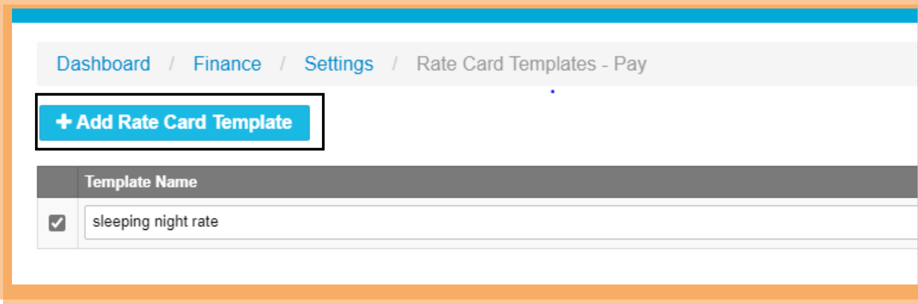
			Hours
			9:00

Creating Pay Rate Templates and Applying them to a Job Role

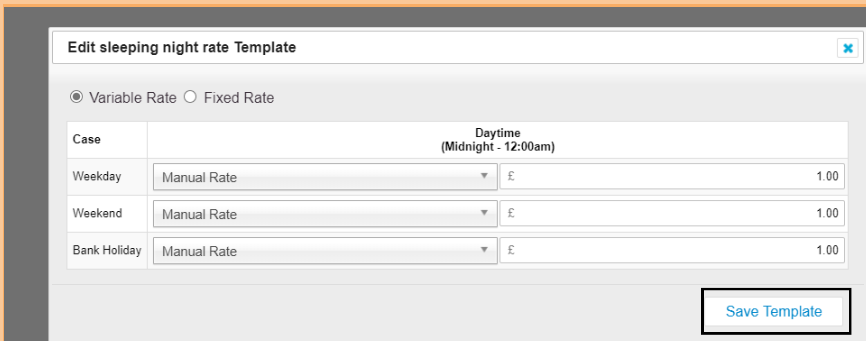
To Create a rate template, go to "Finance" – "Settings" – "Rate Card Templates Pay".



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



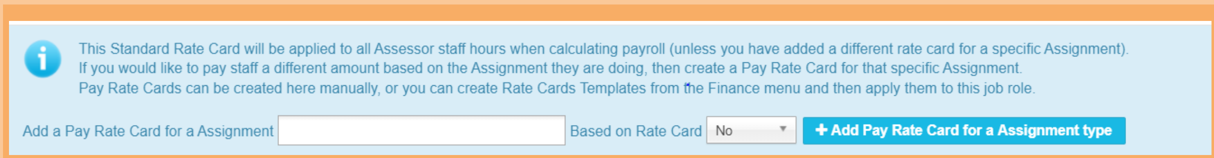
To add the rates, go to the "bulk action" menu and press go on "save/update template". You will then be presented with a new box to enter your new pay rate.



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.

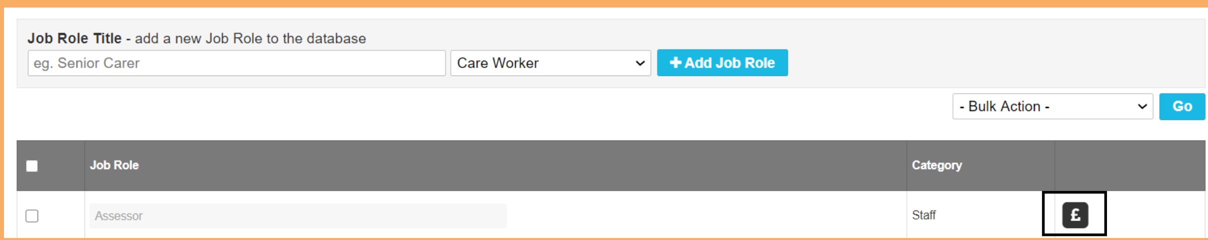
At the very top you can select the visit type you would like the template to be assigned to by **selecting the visit type in the drop-down menu** and then select the template from the drop-down menu. Once you are happy with the selection **press "Add Pay Rate Card for Assignment Type"**.



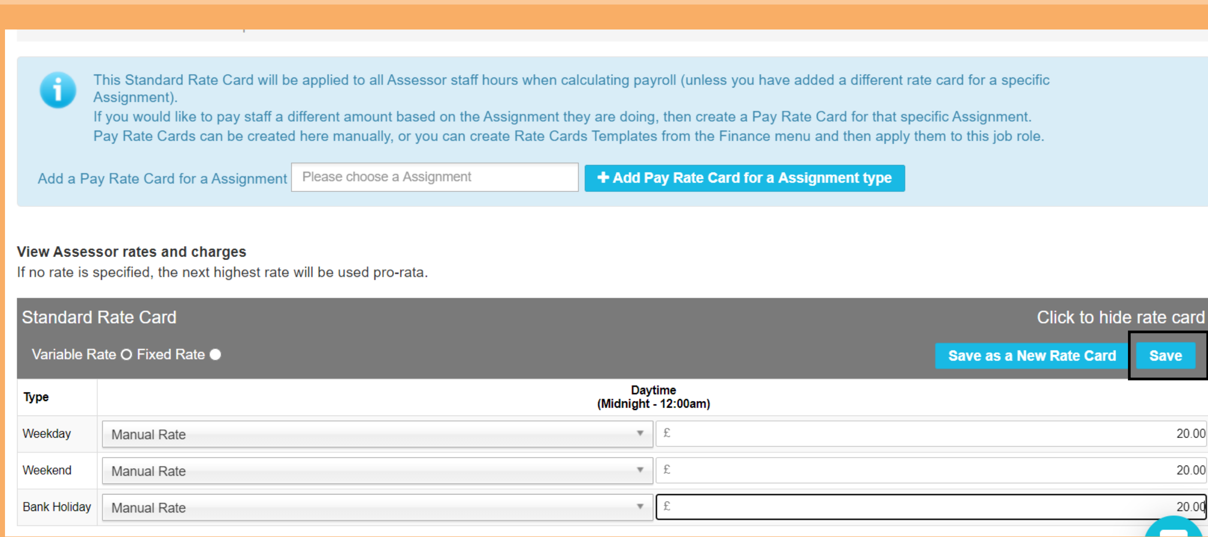
The pay template will go into effect immediately and within the rate cards you will see that the template has now been applied to the visit type.

Setting Pay Rates for Job Roles

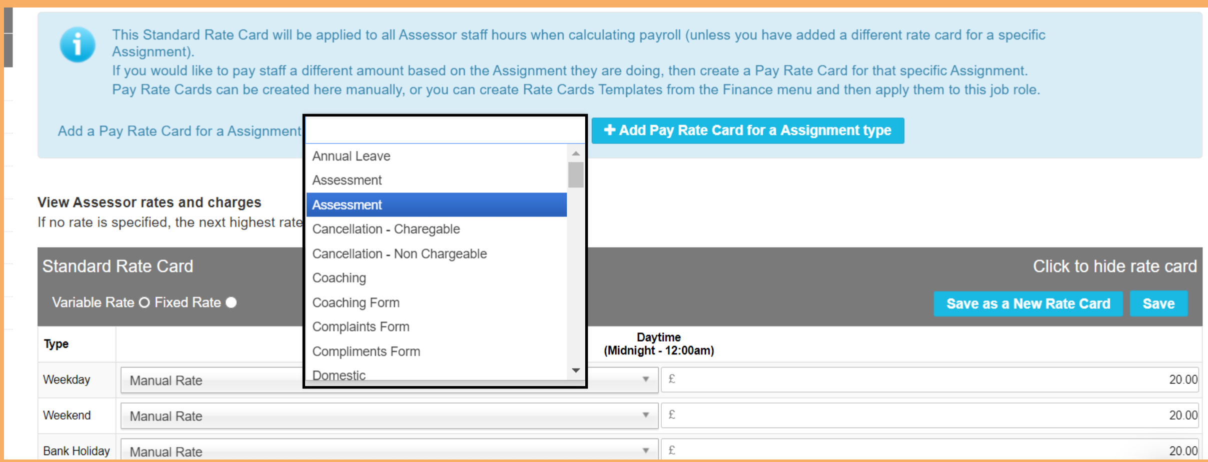
To set the pay rates for each job role, you firstly need to access the "Job Roles" tab under the "Settings" menu. From the list, click the pound symbol to the right of the job role which you need to add a pay rate for:



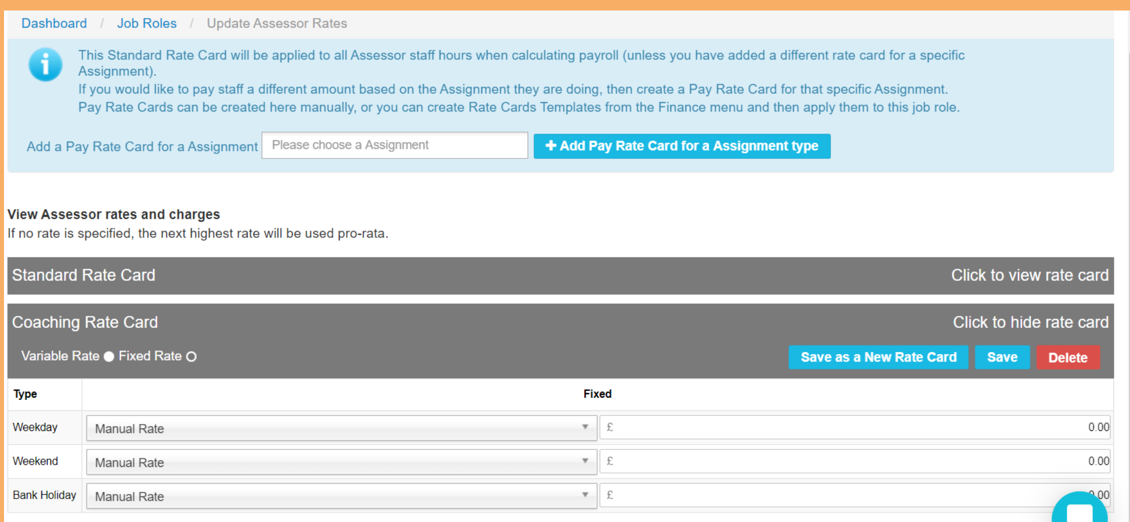
Once you have clicked the pound symbol, you will be able to add the pay rates to the "Standard" rate card for that job role. You can choose to enter a variable pay rate, or a fixed rate. Once you have entered the pay rates, please ensure you click "Save".



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.



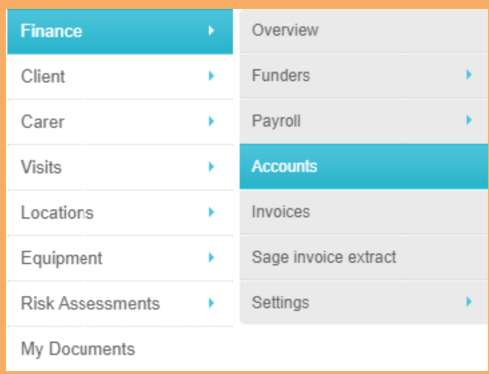
Once you have selected the assignment type, please click "Add Rate Card". This will create the rate card for you, allowing you to enter the pay rate amounts:



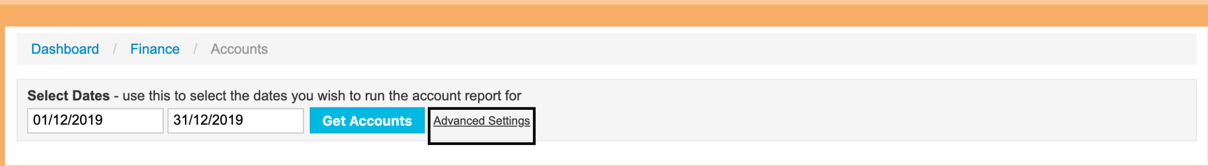
You can add multiple pay rate cards to each job role to ensure your payroll is accurate.

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".

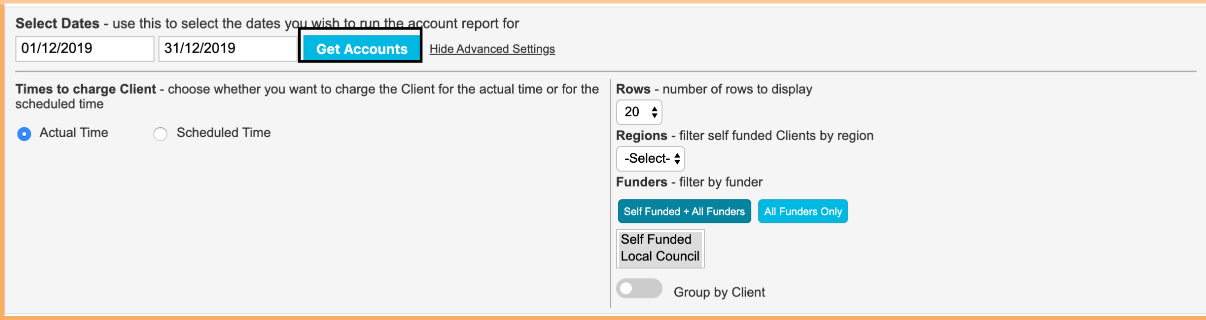


From here, you will then be presented with the option to choose the date range you wish to run the account report for, once you have chosen your dates, you then need to click the "Advanced Settings" option:

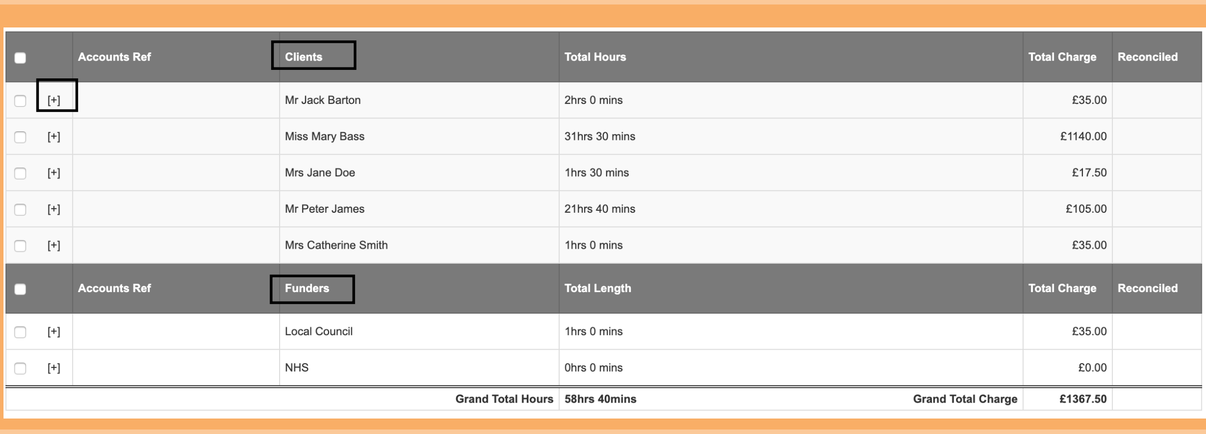


The advance settings allow you to choose further detail for your account report. You can choose to charge your clients for the actual times of care they have received, or for the scheduled times, a specific region and also how many rows to display.

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

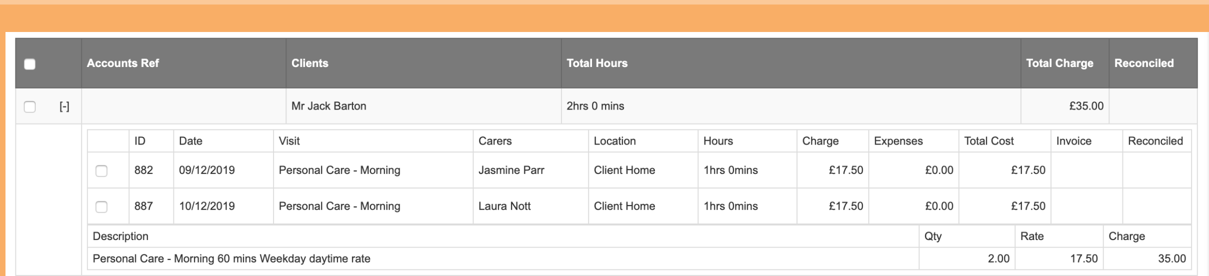


The Account Report is listed alphabetically with clients first, and all bulk funders listed afterwards. You can navigate between the pages using the "Next Page" option.



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

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

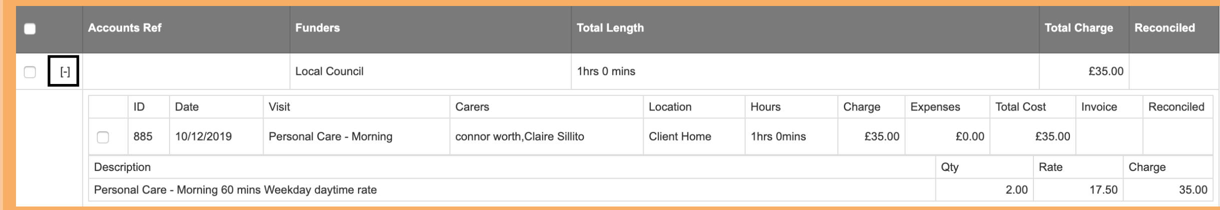


		Accounts Ref	Clients	Total Hours	Total Charge	Reconciled
	[-]		Mr Jack Barton	2hrs 0 mins	£35.00	

	ID	Date	Visit	Carers	Location	Hours	Charge	Expenses	Total Cost	Invoice	Reconciled
	882	09/12/2019	Personal Care - Morning	Jasmine Parr	Client Home	1hrs 0mins	£17.50	£0.00	£17.50		
	887	10/12/2019	Personal Care - Morning	Laura Nott	Client Home	1hrs 0mins	£17.50	£0.00	£17.50		

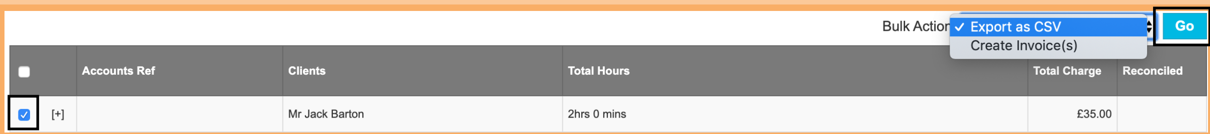
Description	Qty	Rate	Charge
Personal Care - Morning 60 mins Weekday daytime rate	2.00	17.50	35.00

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



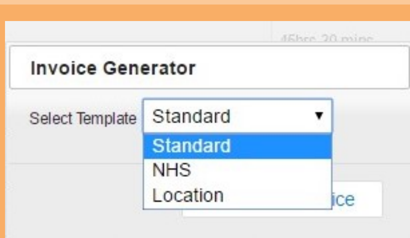
If you are happy that all your charges look correct, you can now utilise the "Bulk Action" menu. The "Bulk Action" menu contains two options – you can export the charge details as a CSV or create an invoice.

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".

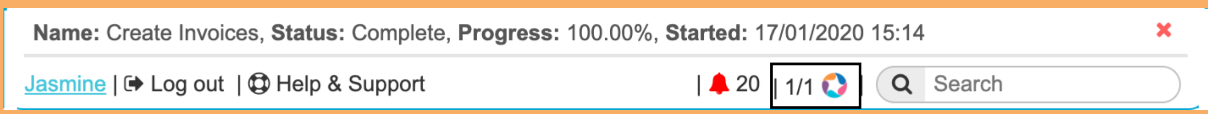


If you have chosen to "Export as CSV" then this will create the Document as a download.

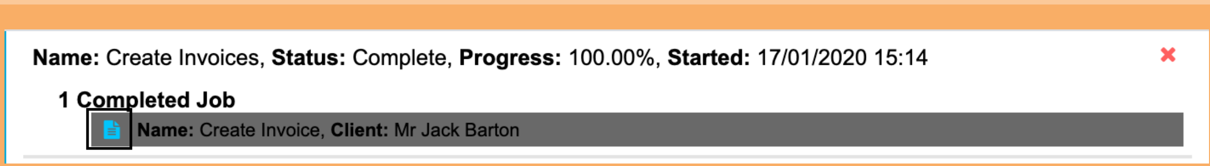
If you have chosen "Create Invoice(s)" then you will be presented with an option to choose the invoice template, you require:



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.

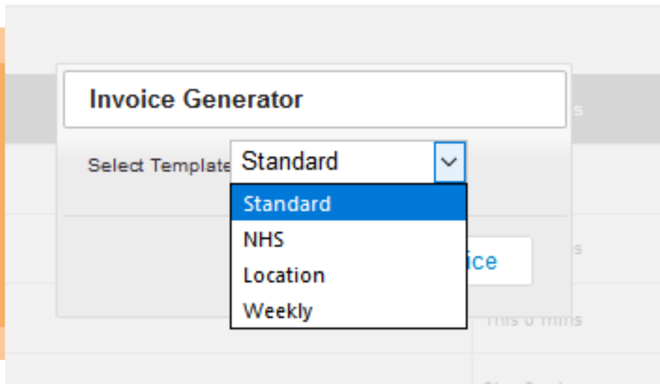


Clicking the task will list all completed jobs. You will then be able to open the invoice generated by clicking on the document icon highlighted in blue, a separate window will then open with the generated invoice in PDF format.



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:


Carefor
Software For Companies That Care

Mr Jack Barton
144 Mulberry Close
Paignton
Devon
TQ33GD

CareFor
Bridge House
Courtenay Street
Newton Abbot
TQ12 2QS
TEL: 01626798890

Invoice #: 00014
Invoice Date: 17/01/2020

ID	Date	Time	Visit	Carers	Hours	Charge	Expenses	Total Cost
#882	09/12/19	7:00am-8:00am	Personal Care - Morning	1	1hrs 0mins	£17.50	£0.00	£17.50
#887	10/12/19	6:50am-7:50am	Personal Care - Morning	1	1hrs 0mins	£17.50	£0.00	£17.50
								Total: £35.00

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):


Carefor
Software For Companies That Care

INVOICE

INVOICE NO: 04335
DATE: 02/03/2017

6 Bridge House
Courtenay Street
Tel: 01626798890 **Fax:**

Billing Address
Dr Rebecca Tregenna

Delivery Address
Mr John Barnes
6 Bridge House
Courtenay Street
Newton Abbot
TQ12 2QS

Account Number	PO Number	Requisitioner	Delivery Note	Terms
	John Barnes			14 DAYS

Quantity	Description	Unit Price	Total
1 hours	Bedtime Call (Client Ref: 026) 13/02/2017-19/02/2017	£24.00 per hour	£24.00
	Expenses (Client Ref:) 13/02/2017-19/02/2017	£0.00	£0.00
0.5 hours	Morning Call (Client Ref: 026) 13/02/2017-19/02/2017	£40.00 per hour	£20.00
Please make cheques payable to Acme Care Company. If paying by BACS, please include the invoice number as your payment reference. Thank you. **Remittance email address:** technical@webformed.co.uk		SUBTOTAL	£44.00
		DISCOUNT AMOUNT	
		VAT	£0.00
		TOTAL DUE	£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:

Carefor
Software For Companies That Care

Invoice #: 04398
02/03/2017
ABC Care Homes
23-29 This Road

That City
West Midlands
B12 3AB

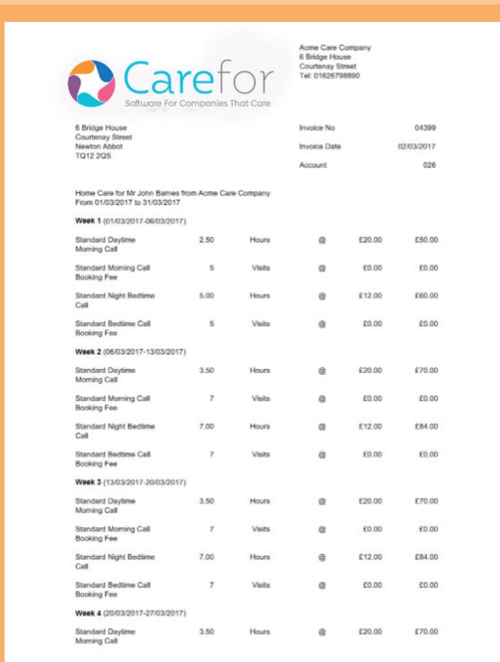
Acme Care Company
6 Bridge House
Courtenay Street
TEL: 01626798890

Date	Location	Carer	From	To	Hours	Rate	Cost	Mileage
07/3/2017		Laura Summers			5.00	£4.00	£20.00	
07/3/2017		Dan Farrell-Wright			5.00	£4.00	£20.00	
07/3/2017		Peter Parker			5.00	£4.00	£20.00	
07/3/2017		Nigel Groves			5.00	£4.00	£20.00	
07/3/2017		Jenny Purple			5.00	£4.00	£20.00	
14/3/2017		Julie Foster			5.00	£4.00	£20.00	
14/3/2017		Claire Sillito			5.00	£4.00	£20.00	
14/3/2017		Charlotte Green			5.00	£4.00	£20.00	
14/3/2017		Paul Edmonds			5.00	£4.00	£20.00	
14/3/2017		Paige Walker			5.00	£4.00	£20.00	
						Total:	£200.00	

Payment is to be received within 14 days.

Please make cheques payable to Acme Care Company. If paying by BACS, please include the invoice number as your payment reference. Thank you.

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



Carefor
Software For Companies That Care

Acme Care Company
6 Bridge House
Courtenay Street
Tel: 01626798890

6 Bridge House
Courtenay Street
Newton Abbot
TQ12 2QS

Invoice No 04399
Invoice Date 02/03/2017
Account 026

Home Care for Mr John Barnes from Acme Care Company
From 01/03/2017 to 31/03/2017

Week 1 (01/03/2017-06/03/2017)

Standard Daytime Morning Call	2.50	Hours	@	£20.00	£50.00
Standard Morning Call Booking Fee	5	Visits	@	£0.00	£0.00
Standard Night Bedtime Call	5.00	Hours	@	£12.00	£60.00
Standard Bedtime Call Booking Fee	5	Visits	@	£0.00	£0.00

Week 2 (06/03/2017-13/03/2017)

Standard Daytime Morning Call	3.50	Hours	@	£20.00	£70.00
Standard Morning Call Booking Fee	7	Visits	@	£0.00	£0.00
Standard Night Bedtime Call	7.00	Hours	@	£12.00	£84.00
Standard Bedtime Call Booking Fee	7	Visits	@	£0.00	£0.00

Week 3 (13/03/2017-20/03/2017)

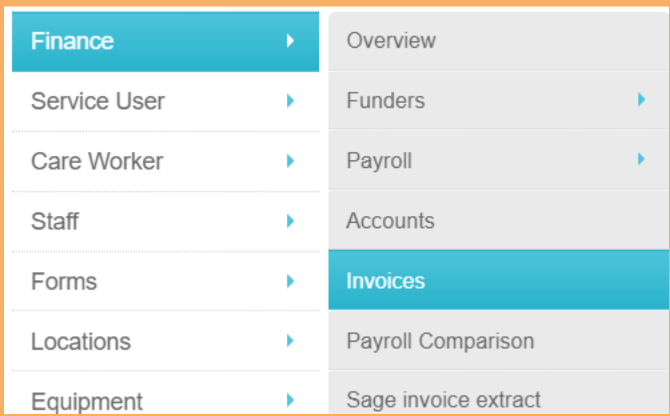
Standard Daytime Morning Call	3.50	Hours	@	£20.00	£70.00
Standard Morning Call Booking Fee	7	Visits	@	£0.00	£0.00
Standard Night Bedtime Call	7.00	Hours	@	£12.00	£84.00
Standard Bedtime Call Booking Fee	7	Visits	@	£0.00	£0.00

Week 4 (20/03/2017-27/03/2017)

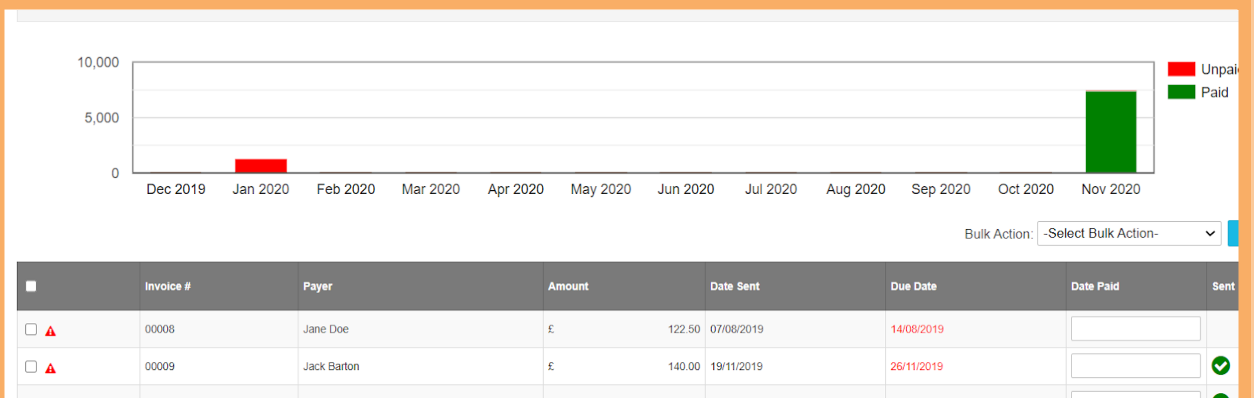
Standard Daytime Morning Call	3.50	Hours	@	£20.00	£70.00

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"**:

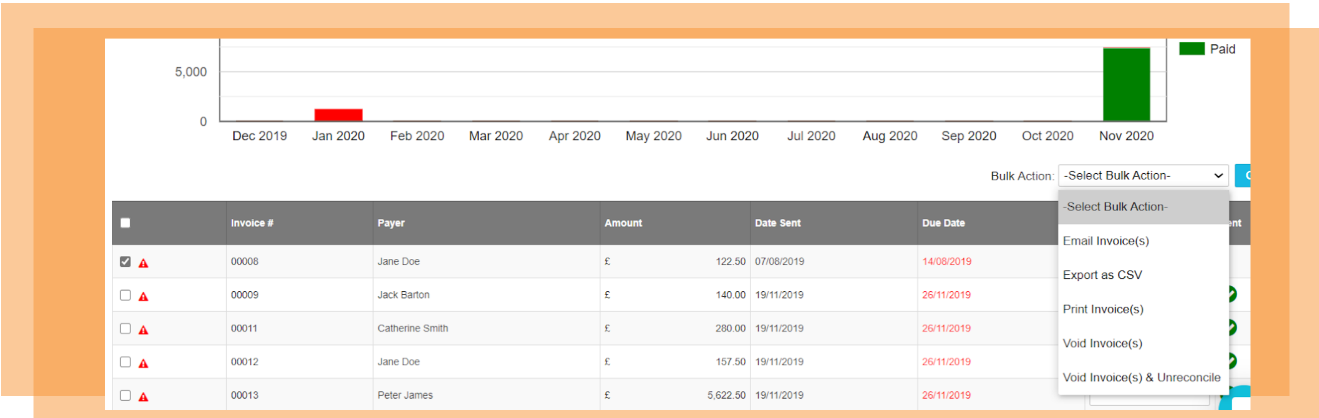


The invoices will always be displayed by oldest unpaid first:



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

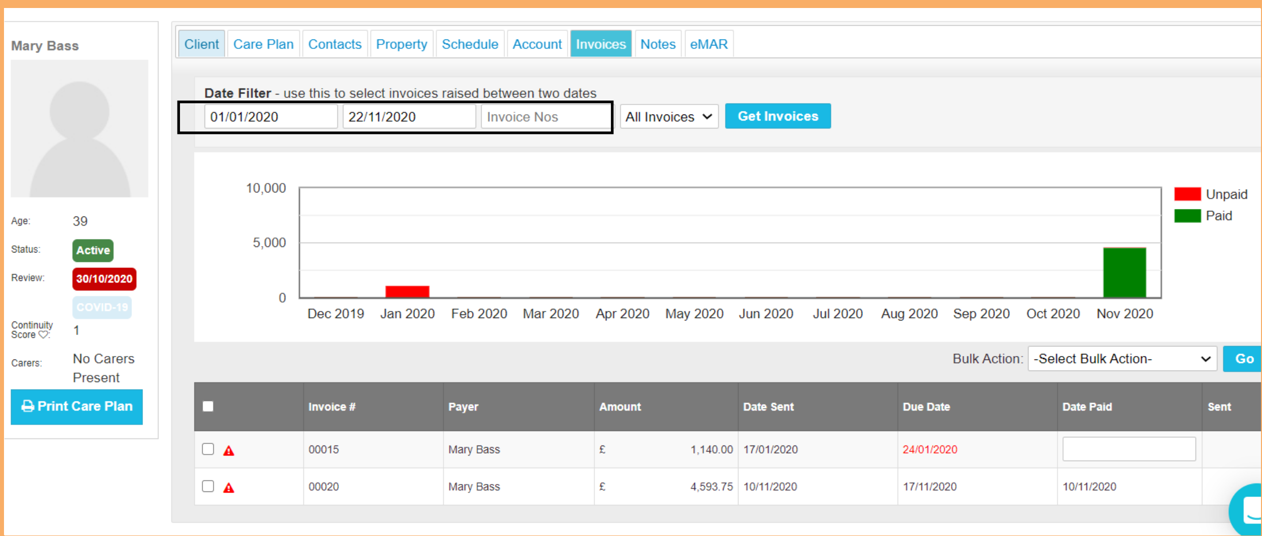
- Print Invoices(s) - allows you to print out the selected invoices. Again, this option presents you with the 'Mark as Sent' button.

- 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

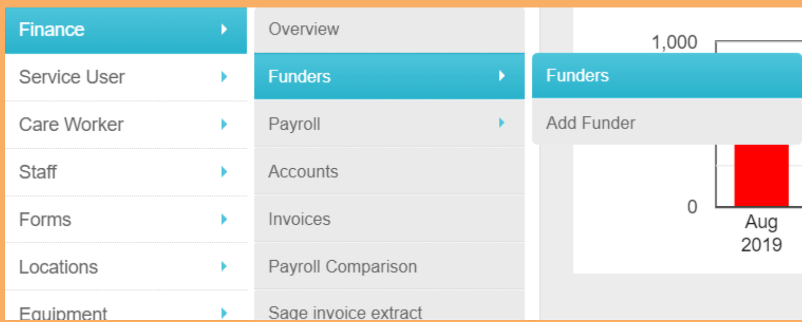
Within the client's profile, there is an "Invoices" tab. Here, you can see all invoices that have been generated for the individual client. Again, you have the option to filter between two dates, and also search by invoice number:



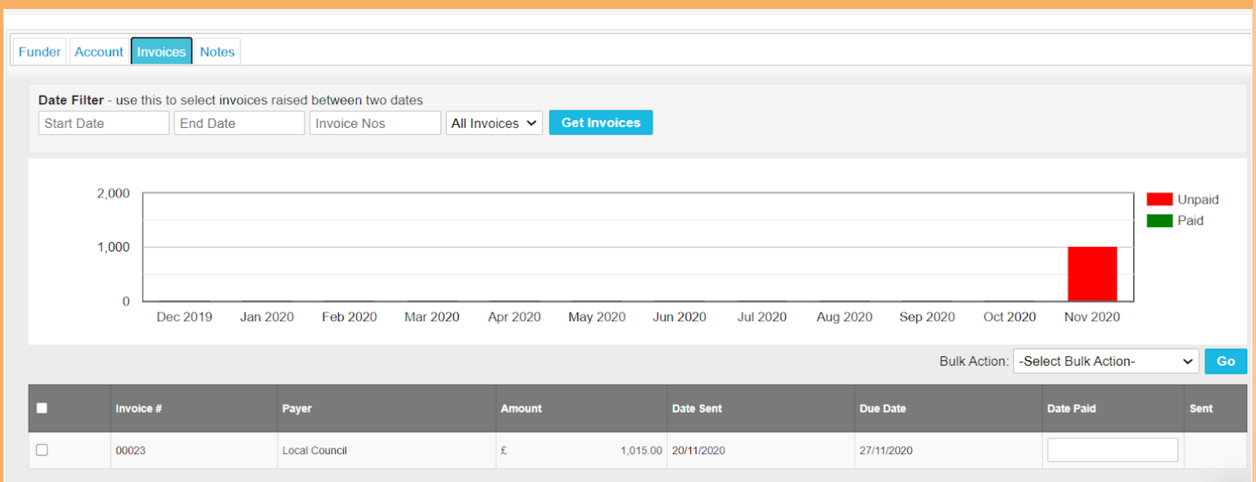
If you click on the "Invoices" tab within a client profile and it is empty, this may be due to their care being paid for by a bulk funder.

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":



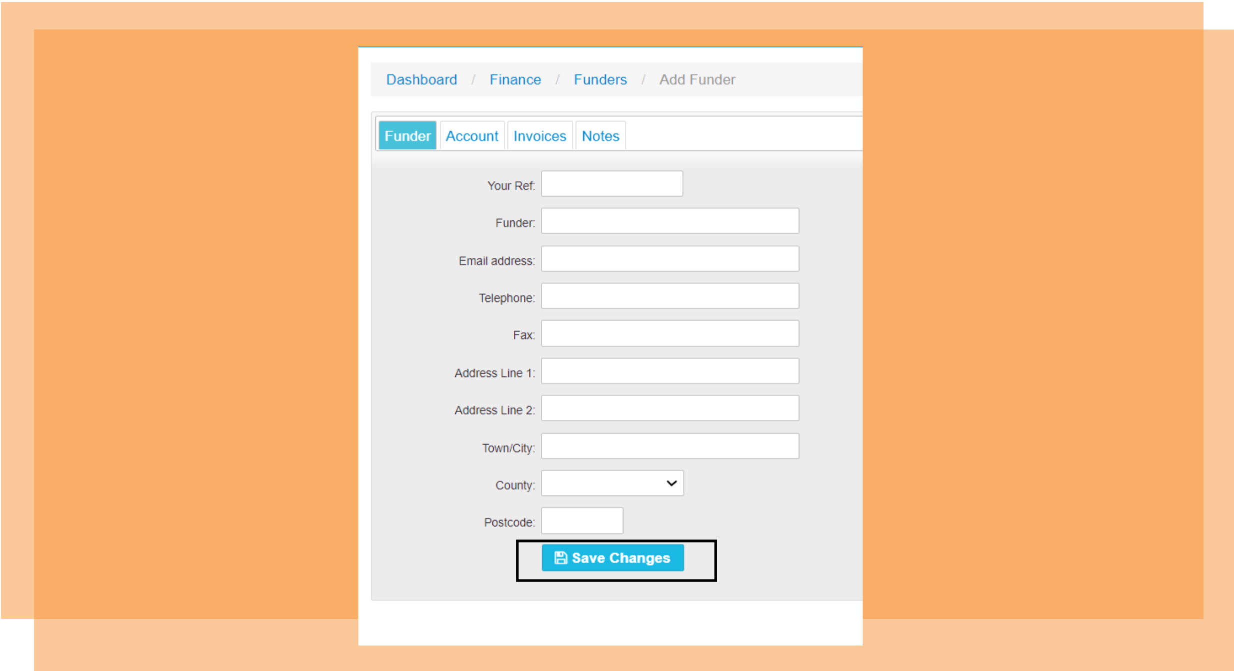
From the list of "Funders", you can then choose which one you want to view by clicking the name. Once in the "Funder" profile, click the "Invoices" tab to view all invoices for that funder. As with all invoice views, you can filter the invoices by a date range or invoice number:



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 Re"' 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.

Any other information can be found by going to 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.