



# Setting Up a Client's Schedule



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### Introduction to Your Client's Schedule

Client Schedules allow you to see all Client scheduled visits and assigned Carers in one place. From here, you can manage and organize all schedules, therefore enabling you to communicate more efficiently with all involved.

You can set up one-time or repeat visits and include helpful notes for the visiting Carer. The Schedule is synced with a notification system so the Carer will receive an automatic alert. With an **interactive Calendar** and **Carer-Client Optimised Matching**, setting up a Client's visit has never been simpler.

**Let's Explore More!**

### Scheduler Highlights

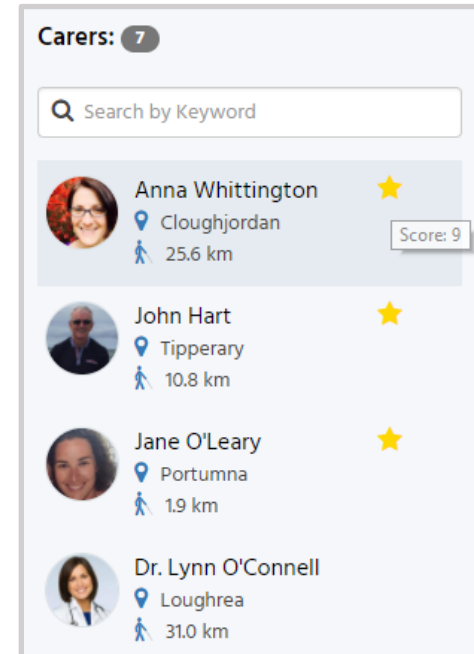
- ✓ Digital Interactive Calendar
- ✓ Automatic Notifications
- ✓ Carer-Client Optimised Matching
- ✓ Notes for Carers

### What is Carer-Client Optimised Matching?

Carefolk's unique **Carer-Client Optimised Matching** feature looks at Carer profiles and determines which Carers are most suitable for a Client based on their skills and proximity to visit sites. It matches Carers with Clients' needs according to their Care Plan.

Each of the following criteria are ranked:

- Carer's Skills
- Carer's Proximity
- Duties Required by Client
- Previous Visit Frequency by Carer



### List of Available Carers

Each Client's Schedule displays a list of **Carers available to be assigned**. Carers marked as an **Unsuitable Carer** in the Client's Care Plan Handling Section **will NOT appear** in this list.

- Hover over the ★ next to **the Carer's name** to view their **Optimised Matching Score**.
- Click on a **Name** to go to the Carer's profile, or click on a **Town/City** to see where the Carer is located on a map.

**Note:** The matching score is **NOT a rating or review** of the Carer rather an estimation of best match for the Client.

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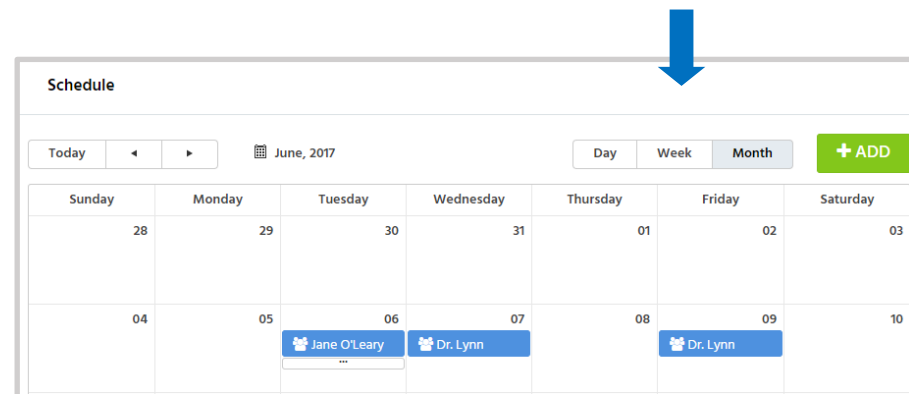
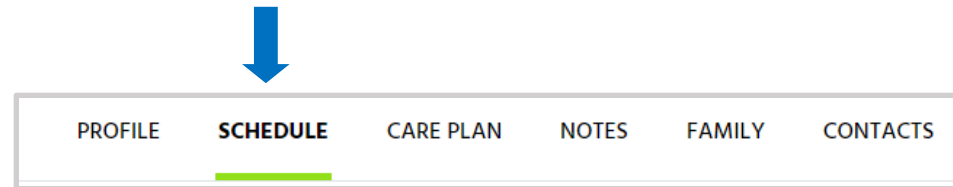
#### Find and View Scheduled Visits

#### Find and View a Client's Scheduled Visits on the Calendar

You can view your Client's entire schedule in one place. Navigate to the Client's profile and select **Schedule** from the top menu.

- Adjust the range of view by toggling between **Day, Week, and Month**.
- Then use **the arrows to advance** the day, week or month **or to go backward**.

**Note:** When viewing by Day or Week, the calendar defaults to Business Hours. To see a full day, choose **Show Full Day** at the bottom of the Calendar.



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## Find and View Scheduled Visits



### View Scheduled Visits on a Carer's Profile.

Navigate to the Carer's Profile and select **Schedule** from the top menu. Toggle the view between **Day**, **Week**, and **Month**. Then use **the arrows to advance** the day, week or month **or to go backward**.

**Note:** When viewing by Day or Week, the calendar defaults to Business Hours. To see a full day, choose **Show Full Day** at the bottom of the Calendar.

The screenshot shows the 'CARERS' section of the Care FOLK PRO interface. The top navigation bar includes 'HOME', 'CLIENTS', 'CARERS', 'SCHEDULER', and 'TIMECARDS'. The user profile for 'Mary at Portumna Heath Ser...' is visible in the top right corner. The main area displays a calendar for August 2017, currently in 'Month' view. The calendar grid shows scheduled visits for the following dates:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	01	02	03	04: Nora Leonard	05
06	07	08	09	10: Rose Dawson	11: Nora Leonard	12
13	14	15	16	17	18: Nora Leonard	19
20	21	22	23	24: Nora Leonard	25: Nora Leonard	26
27	28: Nora Leonard	29	30	31	01	02
03	04	05	06	07	08: Nora Leonard	09

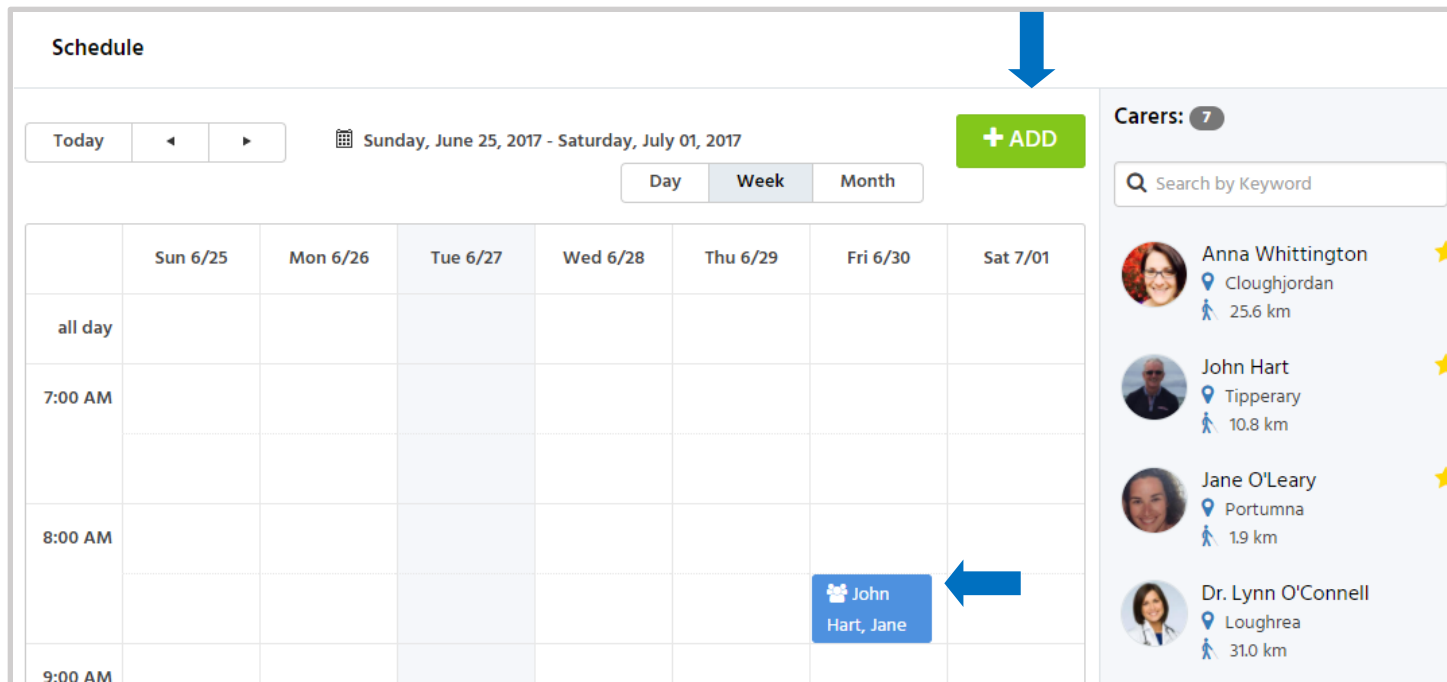
# 4 Setting Up a Client's Schedule

## Add a New Care Visit

### Add a visit to a Client's Schedule

There are **three ways to schedule a visit** for a Client on their **Schedule** page.

1. Select **+Add**. Choose a Carer from the list.
2. Click on the time block on the Client's calendar.
3. From the **Carers** list, drag and drop a Carer's picture onto the Client's calendar.

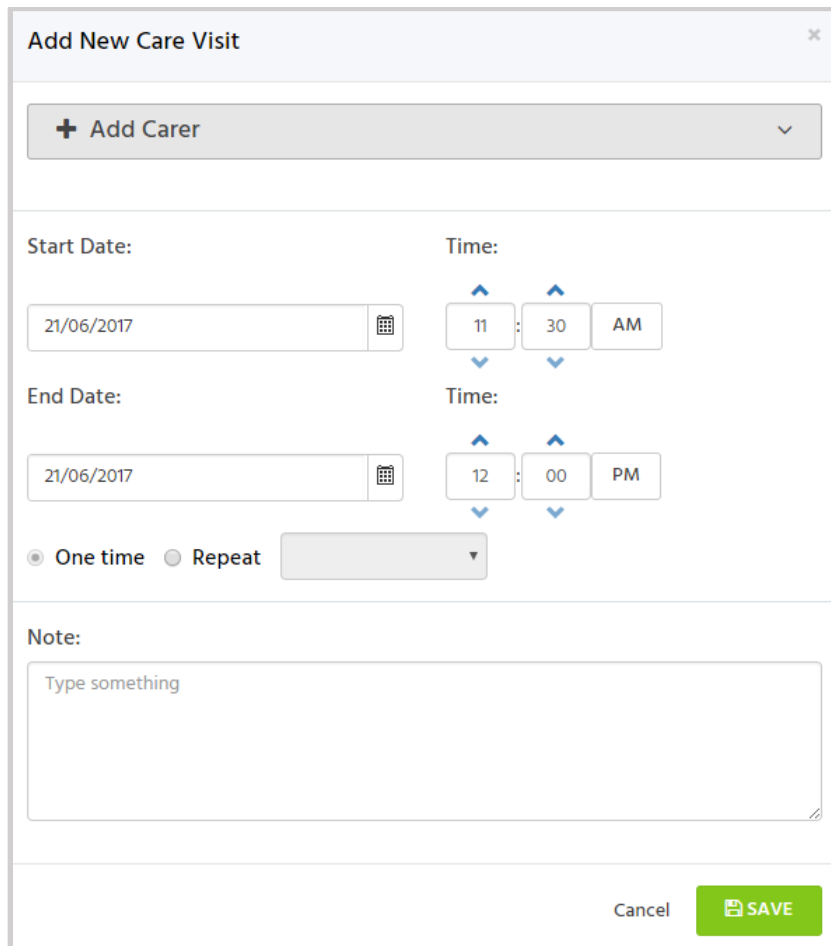


The screenshot shows the 'Schedule' interface. At the top, there are navigation controls for 'Today', a calendar icon, and the date range 'Sunday, June 25, 2017 - Saturday, July 01, 2017'. Below this are view options for 'Day', 'Week', and 'Month'. A prominent green '+ ADD' button is located in the top right corner of the calendar area. The calendar grid shows days from Sun 6/25 to Sat 7/01 and time slots from 'all day' down to 9:00 AM. On the right side, there is a 'Carers: 7' section with a search bar and a list of carers: Anna Whittington (Cloughjordan, 25.6 km), John Hart (Tipperary, 10.8 km), Jane O'Leary (Portumna, 1.9 km), and Dr. Lynn O'Connell (Loughrea, 31.0 km). A blue arrow points from the '+ ADD' button down to the calendar area. Another blue arrow points from the carer list to a blue box on the calendar that contains the text 'John Hart, Jane', indicating that a carer has been added to the schedule.

# 4 Setting Up a Client's Schedule

## Add a New Care Visit

### Adding a New Care Visit



The screenshot shows a form titled "Add New Care Visit" with a close button (X) in the top right corner. At the top is a button labeled "+ Add Carer" with a dropdown arrow. Below this are two rows for date and time selection. The first row is for the "Start Date" and "Time", with the date set to "21/06/2017" and the time set to "11 : 30 AM". The second row is for the "End Date" and "Time", with the date set to "21/06/2017" and the time set to "12 : 00 PM". Below the time fields are radio buttons for "One time" (selected) and "Repeat", followed by a dropdown menu. At the bottom is a "Note:" section with a text area containing the placeholder "Type something". At the very bottom are "Cancel" and "SAVE" buttons.

- Select **+Add Carer**. Choose a name from the dropdown. To **add multiple Carers** to one visit, select **+Add Carer** again. **Remove a Carer** by hovering over the **X** next to the name.
- Add the date or use the calendar for the **Start Date** and use the arrows to adjust the **Start Time**.
- Add the date or use the calendar for the **End Date** and use the arrows to adjust the **End Time**.
- Select whether the visit is a **One Time** visit or a **Repeat**. If it is a Repeat, choose the frequency from the dropdown.
- Add any **Notes** or requirements for the visit.

When finished, select **Save**.




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## Reschedule or Edit a Visit

### Reschedule or Edit a Visit

Need to make changes to an existing visit?

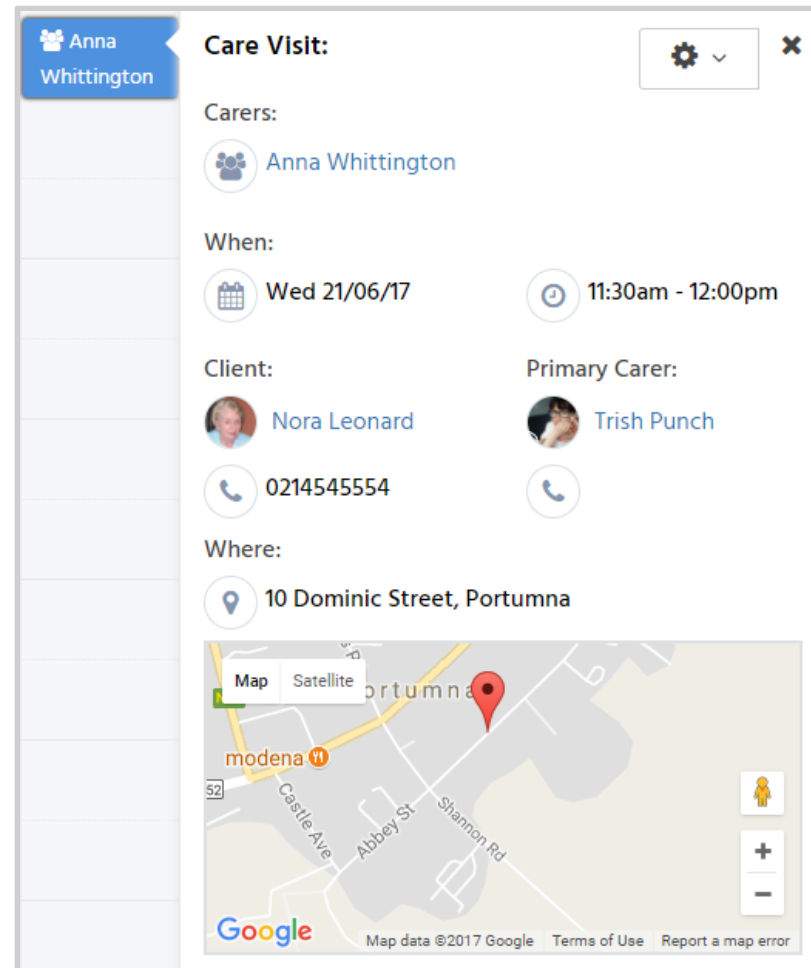
Reschedule or Edit a Scheduled Visit in two ways:



- Use the interactive calendar to **drag-and-drop** the blue visit block to a new date or time on the **Client's** or **Carer's** Schedule.
- Click on the **existing scheduled visit**. Then click on the  to access the dropdown menu and select **Edit**. Adjust the times and dates or reassign the visit to a different Carer.


When finished, select **Save**.



**Want to Remove a Visit?**



To delete a scheduled visit, select **Delete**.






**Care Visit:**  

**Carers:**  
 Anna Whittington

**When:**  
 Wed 21/06/17  11:30am - 12:00pm

**Client:**  Nora Leonard **Primary Carer:**  Trish Punch

 0214545554 

**Where:**  
 10 Dominic Street, Portumna

