CarelinkGo Getting Started

This guide assumes that CarelinkGo has already been installed on your device and the connection details have been entered. If this has not been done, contact your system administrator, as the installation of CarelinkGo is covered in the CarelinkGo Implementation guide.

This section covers the basic functions that are included in CarelinkGo. Your specific version of CarelinkGo may contain other optional modules or features that are not yet included in this Getting Started guide.

Logging In

Start CarelinkGo by selecting the application shortcut on your device.

The logon page will then be displayed

Note: If the CarelinkGo connection details have not yet been configured on this device, the Connection details will be displayed instead of the log in screen. Contact your system administrator for information on setting up your connection details.

Enter your **user name** and **password** (provided by your System Administrator) and select Log in

Note: Users must enter the correct username and password. Settings in CarelinkPlus Global Configurations determine the number of failed login attempts before users are locked out. If you are locked out, contact your System Administrator to reset your log in. For security reasons, CarelinkGo will time out after a period of time as defined in Global Configurations, if your session times out you will be required to log back in to CarelinkMobile.

After logging in the main screen will be displayed which will list all your shifts.

A note about Offline Mode

If your phone is in an area with a poor phone signal strength and has no data connection, a message is displayed on the login screen to indicate that “You are currently in Offline Mode”.

If you have recently logged into CarelinkGo on this device, you will still be able to log in even if it is in offline mode and cannot access the CarelinkMobile web services. Depending on how recently you logged in, it may still have all of the details it downloaded when you last logged in.

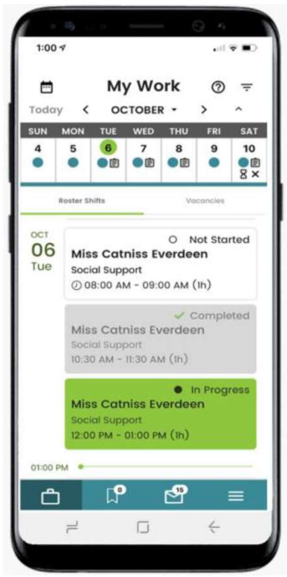
While in offline mode, you can still use CarelinkGo normally. It will keep track of the changes and will update the data once you have a valid connection again.

If you know you will be going to an area that has poor mobile reception, you should log into CarelinkGo and use the Sync option while you are in an good reception area to ensure all of the latest data has been sent to your device.

Home Page

Once you log into CarelinkGo, you are taken to the ‘My Work’ screen. This is your home screen within the application. This will show a split view that shows the Calendar for the week at the top, and the roster shifts for the current or select ed say below. An option in the CarelinkGo settings allows you to use the month Calendar View as the default home page if you prefer.

Indicators on each day of the calendar, show if there are one or more shifts or vacancy shifts on that day.



Week View

This is the week split view.

It shows the current/selected week and the shifts for the selected day.

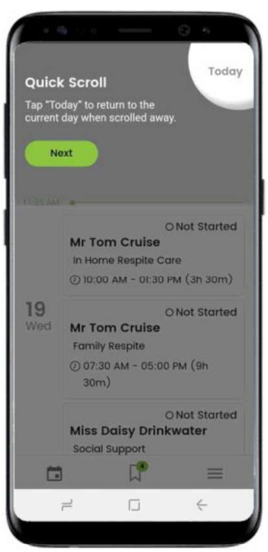
If you have the vacancies module, tabs below the calendar allow you to select either Roster Shifts or vacancies.

Monthly Calendar

This is the optional Calendar view.

Symbols on the calendar view show whether or not you have an shifts / vacancy shift on that day.

Selecting a day will show the weekly split view which will show the shifts/vacancies for the selected day.



Coach marks Enabled – show on screens

If this is the first time you have logged into CarelinkGo on this device, it will display a pop-up hints panel. These are known as ‘Coach marks’ and provide hints on how to use CarelinkGo.

While active, coach marks will be shown on each screen as you move around the application. After reading the message, you will need to press the button on the coach mark to acknowledge that message.

The coach marks can be turned off using the Show Coach Marks option that can be found under the More button (☰).

Navigation / General usage

The Calendar

As well as providing a way to select days, the calendar also shows symbols to show if there are shifts or vacancies on each day. Selecting a day will show the Week View calendar followed by the shifts for that day.

You can change the month being viewed by tapping the month name. Or you can use the navigation arrows on either side of the month to step forward (>) or backward (<). If you are in week view, the navigation arrows will move you back and forth through the weeks.

When in week view, after selecting a month, it will show the first week of that month. You can then use the navigation buttons to move forwards or backwards through the weeks.

Selecting a day on the calendar will show the shifts for that day.

Indicators on the days of the calendar will show whether there are shifts / vacancies on that day. Pressing the question mark ( ) at the top of the screen will show this calendar symbol legend on your device:

1 This shows the current date (Today)

- Indicates days that have shifts

The following only apply if you have the Vacancies module:

- Vacancy shift(s) available.
- Applied. You have applied for a vacancy shift
- Declined. You have declined this shift.
- Unsuccessful. You applied but this shift was not allocated to you.

Shift Lists

If there are more shifts than can be displayed in the list, you can swipe vertically to scroll up or down through the list.

Tapping on a roster shift will display the shift details. From there you can view the client details, Alerts, Notes, Reminders, Tasks and Attached Documents (Docs) for that client/shift. There will also be options to call the client on the phone and view their address on a map that can also provide navigation directions.

If you have the Vacancies module:

You will be able to select either Rosters or Vacancies via a tab below the week calendar.

A filter option ( ) is available at the top of the screen that can be used to apply various filters to the roster or vacancies view. If you apply filters, they will apply to both the calendar and the shift lists.

Navigating screens

On some screens there will be a **<Back** option on the top left of the screen. This is used to return to the previous screen. The back button built into the device which is usually shown as a back arrow on the bottom right of the screen, generally cannot be used for security reasons and often data has to be requested when moving back to a screen. The device Back button is generally only available for use where you have selected an option that activates a feature on the phone such as display a map, or dial a number, etc.

My Work – Tap this icon to return to the Calendar/Roster Shifts page. Depending on your settings this will show the split view with the Week Calandar/Roster Shifts, or the Month Calendar. Vacancies are also accessed through this view, if you have that module.

Reminders – Use this option to view your carer reminders or reminders set for any of your clients/shifts. Refer to reminders later in this document. Note that when you select this option, it initially filters the list of reminders to all of those with a reminder date within the last 30 days including today. To view other reminders, you can use the filter option at the top right of the screen to specify other filter criteria.

Messages – CarelinkPlus users can use the messaging options in CarelinkPlus to send general messages or shift messages to CarelinkGo users. This option is used to access those messages. Refer to Messaging later in this document.

More - There are several options and settings available through the More button. These are covered under More Options section, later in this document.

My Work - Roster Shifts

The Roster Shifts screen shows the Week View calendar at the top, followed by the lists of all your shifts in date time order going down the page. There are settings in CarelinkPlus that determine how many days' worth of shifts are downloaded to your device.

For each shift it will show the client's name (title, preferred name, surname), the service, and the start and end time.

For the current day there is a line that shows the current time. It will be positioned on the screen based on the end time for shifts for that day, with those shifts that have an end time earlier than the current time being show above the current timeline.

Completed shifts will show the status 'Completed' and be highlighted in a different colour.

Tapping on a roster shift will display the shift details (shown below). From there you can view the client information, Alerts, Notes, Reminders, Tasks, Attached Documents (Docs), Forms (optional module). There will also be options to call the client on the phone, view their address on a map that can also provide navigation directions, start or stop a shift, etc.

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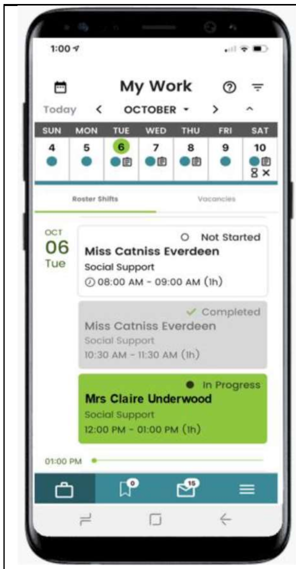
<td>
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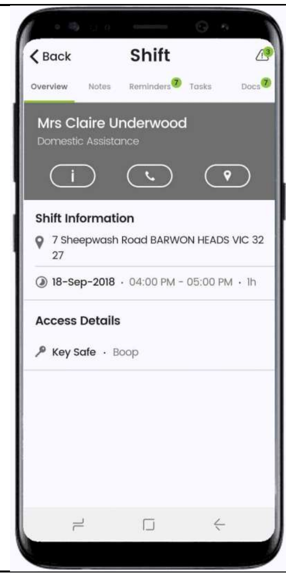
<td>
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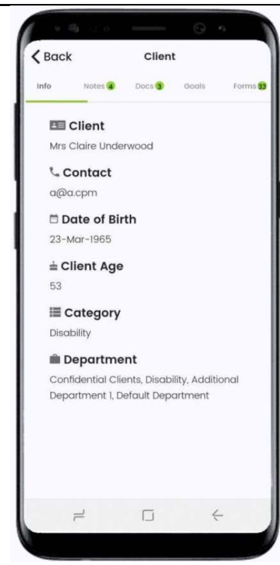
<td>
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<tr>
<td>Roster Shifts</td>
<td>Shift Details</td>
<td>Client Information</td>
</tr>
</table>

If this client has one or more Alerts configured, the Alerts are displayed as soon as you select the shift from the Roster Shifts screen. If there is more than one alert, you can scroll through the details. You must tap 'I Understand' to acknowledge the alerts and be able to continue to the shift details.

Shift Details

After selecting a shift from the Roster Shifts list and acknowledging any alerts that may be applicable, you are presented with the shift details. From here you can:

 Tap this icon to view additional client information.

Tap the phone icon to display your phone's dial page. It will already have the client's default number ready to dial. To return to CarelinkGo, use the phone's back button/gesture.

Tap this icon to view the clients address on a Map. You can also find a Directions button on the map that can be used to provide turn by turn navigation information.

Notes Tap the Notes tab at the top of this screen to view any notes that are available on this device for this client / shift. A coloured indicator will be shown in the tab with a number in it to indicate if there are any notes to view.

Reminders Tap the Reminder tab at the top of this screen to view any Reminders that are available on this device for this client / shift. A coloured indicator will be shown in the tab with a number in it to indicate if there are any reminders to view.

Tasks Tap the Task tab at the top of this screen to view any Tasks that have been specified for this shift. A coloured indicator will be shown in the tab with a number in it to indicate if there are any tasks to view.

Docs Tap the Docs tab at the top of this screen to view any attached documents that have been specified for this client. A coloured indicator will be shown in the tab with a number in it to indicate if there are any documents to view. Only PDF Documents can be viewed through CarelinkGo, and only documents that have specifically been set in CarelinkPlus to allow viewing on a mobile device will be included.

The documents will be displayed in your preferred PDF viewer on this device. If one has not yet been specified, you will be asked to select the preferred viewer.

Once done, close the PDF viewer to return to CarelinkGo.

Forms You will only have this tab if you have the optional Forms Module. This utilises CarelinkAir and allows you to add or edit Forms for this client directly through CarelinkGo.

Tap this icon to view the alerts for this client again. You can then tap 'I Understand' to return to CarelinkGo.

Start Shift Tap the start shift option to start this shift. You will be prompted to confirm that you are now starting this shift.
The process of starting a shift and then completing the shift is covered below.

When additional items such as notes, reminders and alerts, documents are added in CarelinkPlus, only those that are specifically set to show on mobile devices will show in CarelinkGo.

Processing Shifts

One of the key functions in CarelinkGo is the recording of key shift information such as starting and completing shifts, adding any relevant notes or reminders, etc.

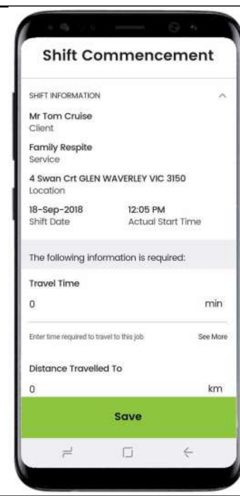
There is an optional feature called Back to Back Shifts. If this option is enabled, shifts that start and end one after another within a designated time, for the same client and carer will be treated as a single back to back shift. Although most of the screens and options shown below for regular shifts still apply, there are a few differences for a back to back shift. These differences are covered in the Back to Back Shifts section later in this document.

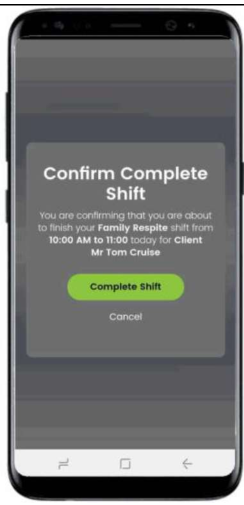
CarelinkGo walks you through the process once you start the shift. The process is:

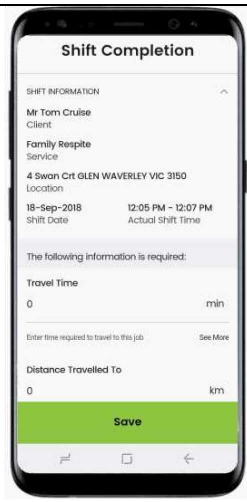
1. Select a shift from the Shift List.

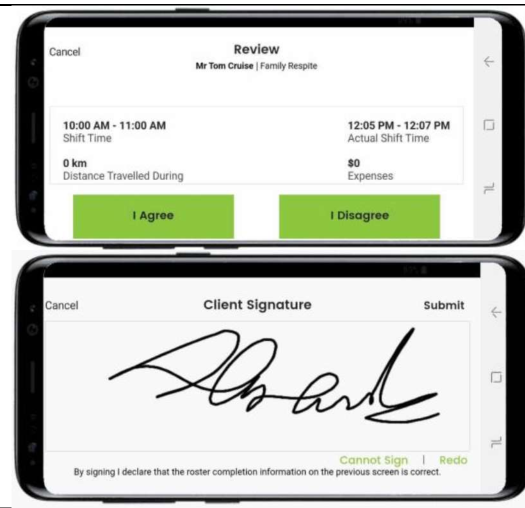
2. Tap Start Shift – You should only do this when you are actually starting the shift as CarelinkGo will record the start times and other information as at the time you confirm that you are starting the shift.
3. Confirm that you are starting the shift and optionally enter the travel Time and/or Travel distance, expenses if applicable (this can also be entered at the end of the shift if you prefer).
4. Tap Save and the device will confirm that the shift has commenced.
5. Perform your duties.
6. At the completion of the shift, select the shift and tap the Complete Shift option.
7. Confirm that you are completing the shift.
8. Enter or confirm any travel Time and/or Travel distances, Expenses, etc.
9. Tap Save and you will then be presented with a Review Screen. This is for the client to review the details.
10. Show the details to the client and ask them to select either I Agree, or I Disagree.
11. The client will be presented with the Client Signature screen.
    a. If they agreed and can sign, they should sign directly on the device using their finger or a stylus.
    b. If they are not capable of signing or did not agree, tap the option ‘Cannot Sign’. You can then choose ‘Cannot Sign’ or ‘Refused to Sign’, choose a reason from the list and press Done.
12. If the client did not sign, you will automatically be presented with the Create Reminder form. You can then enter some details, specify a due date (for follow up) and allocate the reminder to one or more people by ticking one or more options at the bottom of the reminders form.
13. Finally sign your name and press Submit.

There is a configuration option in CarelinkPlus that determines whether you can start more than one shift at a time.
The images below show the screens for each step of the Start / Complete Shift process as outlined above.

			
Select a shift Press Start Shift	Confirm Start Shift	Optionally enter expenses /travel and press Save	Perform Duties and Press Complete Shift when done





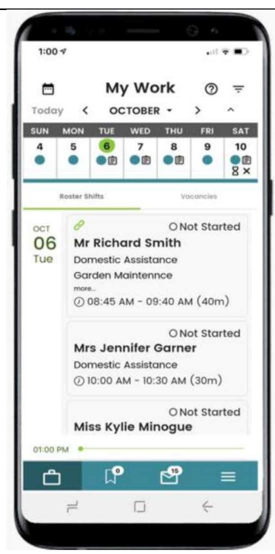


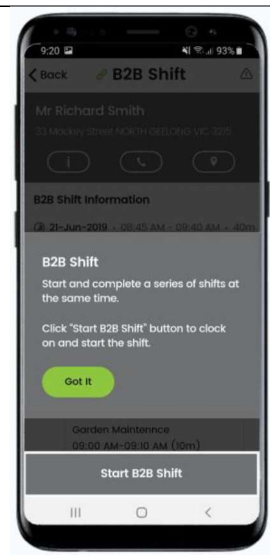
Confirm shift complete.	Optionally enter expenses /travel and press Save.	Review Details / Client Signs and submits or selects reason for not signing and then you sign and submit.

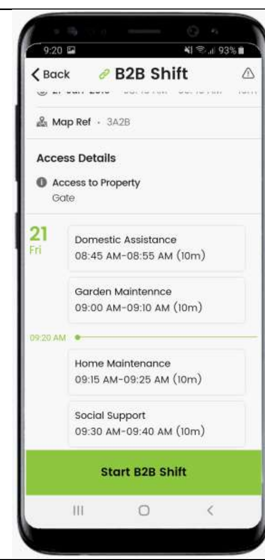
Back to Back Shifts (B2B)

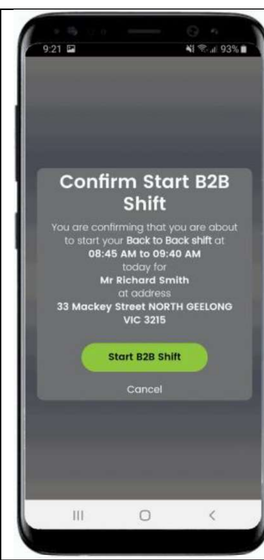
If your organisation has the Back to Back shift option enabled (B2B), consecutive shifts for the same carer and same client that end and start within the specified number of minutes of each other, will be consolidated into a single back to back shift in CarelinkGo. This allows you to start and complete all the shifts that qualified as a B2B shift in a single action.

The processing of B2B shifts is basically the same as shown above, except that rather than having to start, complete, and sign each shift individually, they will all be processed as the one B2B shift. When working with a B2B shift, some of the screens shown above will work slightly differently or show additional information:

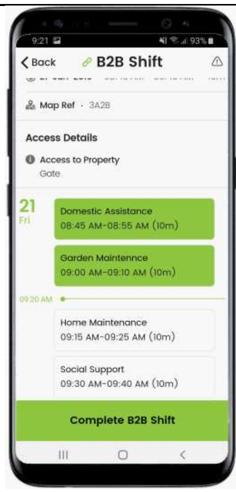




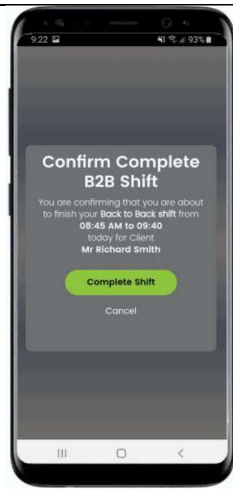




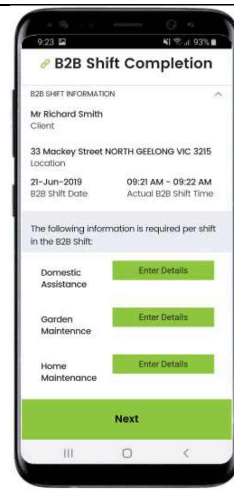
On the roster, A B2B shift shows a 'link' icon ( ) in the top left of the screen and will show multiple services.	If this is the first time you have ever accessed a B2B shift, a notification message may be displayed.	On selecting a B2B shift, it will list the individual shifts that are part of the B2B. You click on these shifts to view the details.	Starting a B2B shift is the same as any other shift.



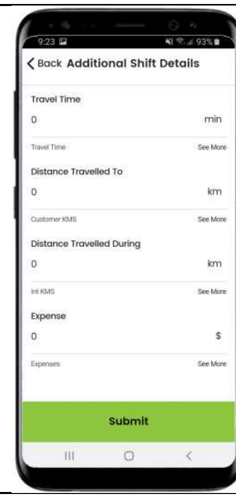
B2B Contains multiple shifts. If you need to see any details including notes, documents, tasks etc., you can select the individual shifts.
There is no need to complete these individual shifts, this is handled automatically when you complete the B2B shift.



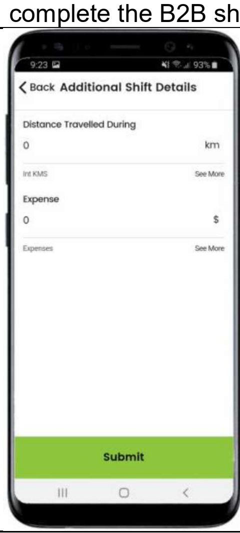
You only complete the B2B shift after performing all of the shift duties in the B2B group.



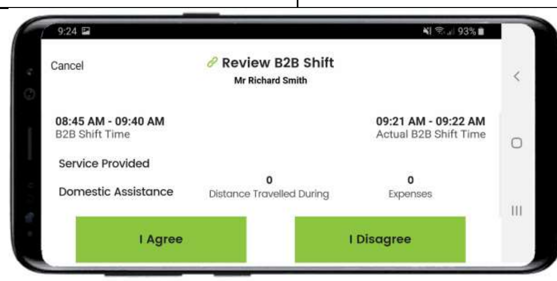
It will list each shift, to allow you to enter travel and expenses etc.



Only the first shift in the group will allow you to enter Travel Time and Kilometres (to the client's location).



You can enter Internal Km and Expenses for each of the subsequent shifts,



The review screen can be scrolled vertically, to show all the details for each of the shifts included in the B2B group.
You only need to go through the signing process once and that will cover all shifts in the B2B group.