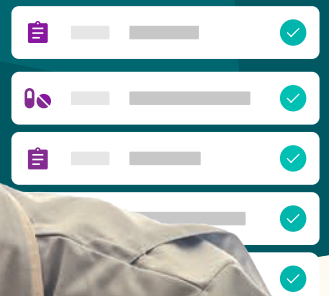


# Better systems

# mean better care

Improve your efficiency, capacity and compliance by digitising your workflows and automating processes such as rostering and payroll, allowing you and your carers more time to care.



Paracetamol



Completed



John's mobility has improved but still requires assistance.



CareLineLive



ASSOCIATED WITH:



CARELINELIVE.COM

# Table of Contents

Introduction: Overview of All Features	3
Management Platform	4
Carer Companion App and Managed Handsets	5
Carer Tasks including eMAR	6
Care Circle Portal	7
Invoicing and Payroll	8
Care Planning and On-Going Care Management	9
Capacity Planning	10
Management Reports and Regulatory Compliance	11
Disaster Recovery and Cyber Security	12
Onboarding and On-Going Support	13
Features and Benefits	14
Testimonials	15

## **Pricing**

All-in-one simple, affordable and transparent pricing. Call us to find out more.

## **Contract terms**

Fair and transparent contracts. Initial minimum term of 12 months.

# Delivering more

# time to care

We know how important it is to provide home care agencies with digital systems that improve productivity, performance and compliance. CareLineLive's all-in-one homecare software will increase your business's efficiency and help your carers have more time to care.



Easy to use and affordable all-in-one management software, developed with home care agencies for home care agencies.



Having understood the challenges home care agencies face, we developed CareLineLive as an all-in-one home care management solution that improves efficiency, administrative capacity and compliance by digitising workflows and automating processes such as rostering and payroll. CareLineLive enables growth whilst decreasing costs.

Integral to CareLineLive's Management Portal is the Carer Companion App which allows real-time call-monitoring and keeps carers informed of their rotas and care plans. Digital records including task completions, medical administration, welfare observations and visit notes save time and improve compliance and communications with all stakeholders.

Family and key stakeholders can have access in real-time to all information via CareLineLive's Care Circle portal.



Rostering and Care Management Platform



Carer Companion App



Care Circle Portal



Assessment Tools



Client Observations



Carer Tasks including eMAR



Incident Reporting and Carer Concerns



Automated Invoicing and Payroll



Enterprise Grade Secure Cloud Environment



Friendly and Responsive Support



FOR HOME CARE AGENCY OWNERS, MANAGERS AND CO-ORDINATORS

# Management Platform

Our system is easy to use and it will increase your efficiency, capacity, compliance and profits. CareLineLive is cloud-based so it is quick to set up, requires no expensive hardware and can be used anywhere there is an internet connection.

It has multiple features that will help ease the day-to-day challenges of running your business.

## Quick Rostering and Easy Client and Carer Management

Roster client visits and assign preferences for clients, for example preferred carers. Make quick changes using drag and drop, plus notify carers of roster changes via push notifications. Easily update client details, care plans, assessments, observations and eMAR with a few clicks, ensuring clients always get the care they need.

## Capacity Planning

Using existing data within CareLineLive, our capacity planning assistant allows managers to confidently and quickly understand whether a new care package can be accommodated given an agency's allocation of carers, their locations, rotas and skills.

## Invoicing and Payroll

Call monitoring using our Carer Companion App automates recording of check-in and check-out times for client visits.

This enables quick and easy payroll reports and client invoicing.

## Real-Time Call Monitoring

Keep updated in real-time about carer attendance, visit notes and alerts for missed or late visits and task completions. Live call monitoring, via QR code and GPS location recording of check-ins and check-outs, allow managers to know when a visit has been completed. Lone worker safety is improved.

## Effortless Reporting

There are 30 reports that can inform your business from visit financial information to carer utilisation. Not only is this beneficial in pinpointing areas which can be improved but aids with evidencing the performance of standards for regulatory bodies such as the CQC.

## Keep Family and Friends Up-To-Date

Provide 24/7 access to visit schedules, dates and times. Allow family and friends to access carer notes, observations, administered medication and visit information via our Care Circle Portal, ensuring peace of mind, always. Quick and easy one-off access for emergency services is also possible.

# Carer Companion App and Managed Handsets

Carers are at the heart of any home care agency, so providing them with the tools to work efficiently and giving them more time to care is essential.

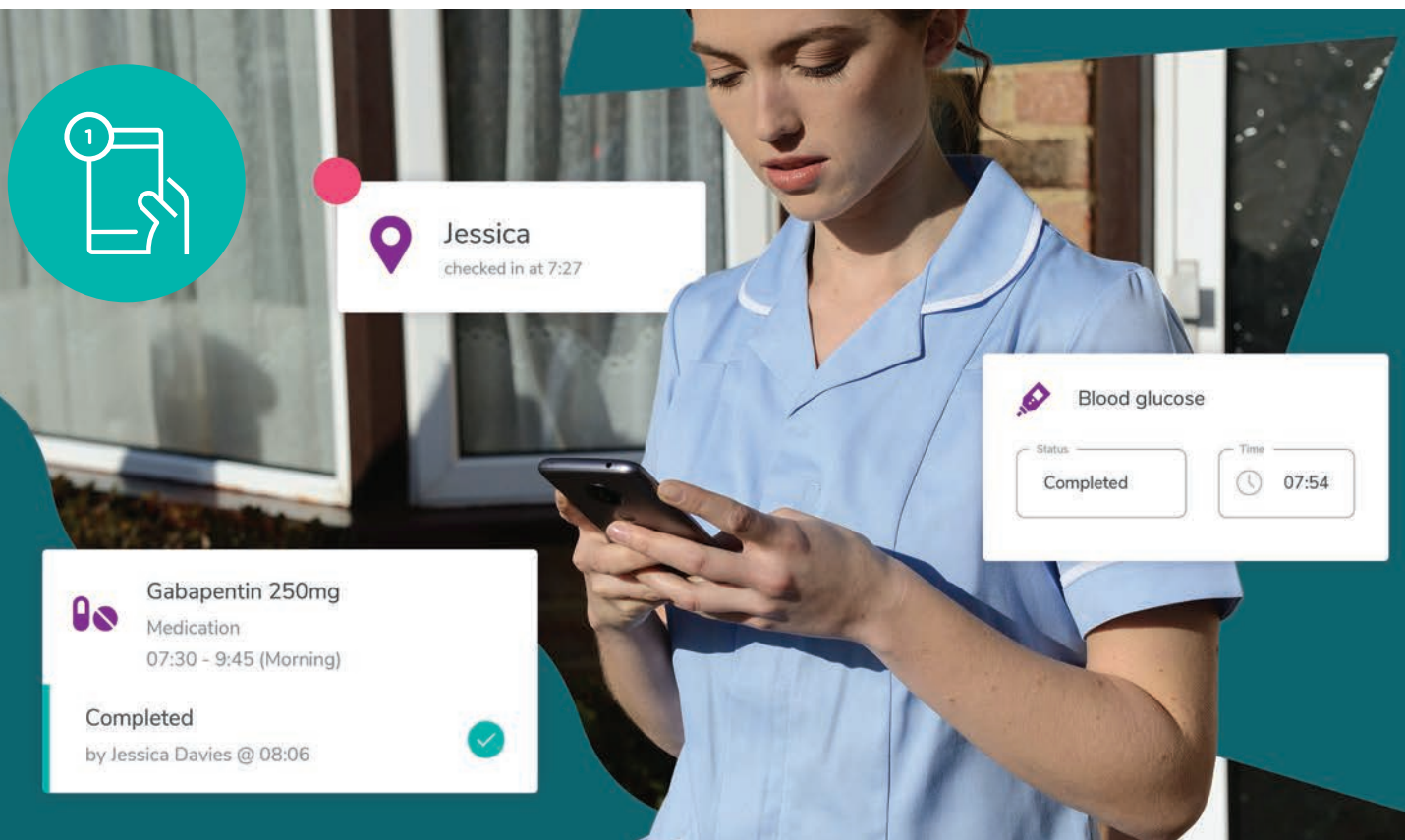
With our Carer Companion App, carers are alerted to changes in their rotas in real-time. Carers can easily access care plans, client details such as address and phone numbers and check information such as tasks and observations required plus medication to administer. A single click will route the carer to the client's address. The app ensures carers are fully informed, increasing their productivity and resulting in less errors during client visits.

The Carer Companion App uses QR codes unique to each client, as well as GPS location for visit check-in and check-out, enabling verifiable call monitoring and allowing office managers to know the status of a visit in real-time.

We appreciate that different home care agencies have different needs. That's why, with CareLineLive, home care agencies can choose how they access our Carer Companion App. We can provide fully managed handsets that have the Carer Companion App pre-installed, are fully encrypted, include an all-inclusive mobile network plan with unlimited calls and data. Alternatively, the app is available as a download for iOS and Android for those agencies where carers will use their own mobile handsets.

With the Carer Companion App, paper administration is reduced and information can be accessed in real-time by key stakeholders. Carers can raise a concern and flag its severity so day-to-day challenges can be managed and prioritised.

- ✓ Real-time rota access
- ✓ Improved lone worker safety
- ✓ Carer notes and concerns
- ✓ Fully managed handsets (optional)
- ✓ Verifiable check-in and check-out
- ✓ Carer task completion and compliance including eMAR
- ✓ Client information including care plans
- ✓ Client observations
- ✓ Photo uploads





PROVIDING RESPONSIVE AND ACCURATE CARE

# Carer Tasks including eMAR

Enabling carers to be kept continuously informed of a client's changing needs. Ensures the status of all carer tasks and clients' medication are accurately recorded.

- ✓ Easy-to-use tasks including eMAR
- ✓ Modifiable completion codes
- ✓ Alerts raised for missed or incompleted tasks
- ✓ Printable eMAR charts

Our Carer Tasks, including eMAR, allow home care agencies to record a client's visit requirements including medication quickly and easily within the Management Platform. It reduces errors and allows for continual monitoring as managers can view medication given, tasks completed, and can be alerted when there is a concern e.g. when medication has been missed.

Vital medication information can be held for each client, including medication start and finish dates, dosage and route.

Within the Carer Companion App at each client visit, carers can easily view and complete tasks including medication administration. Carers are expected to mark each task as completed. However, in the event a carer is unable to complete a task they can choose from a number of pre-defined status codes, some of which are alertable or require a comment from the carer e.g. when there is no stock of medication available. Status codes are fully customisable and can be adapted to your business needs.

With our Carer Tasks and eMAR, carers spend less time completing paperwork, provide responsive and personalised care, plus have more time to care.

# Care Circle Portal

Benefit from easily sharing information with family and loved ones in real-time via our Care Circle Portal and allow other stakeholders such as healthcare professionals to be fully informed to offer better person-centred care



Comprehensive client information accessible 24/7 including contact information, next of kin details, medical history, visit details, prescribed medication, observations and more.



Allows one-time temporary instant access to the emergency services to view up-to-date records about a client's care, observations, and medication, enabling effective treatment to be administered.



Reduce the number of client queries: family have access to continuity of care information and communication regarding any issues or updates about their loved one's care.



Have complete control on who sees what client information by assigning roles to different users within the Care Circle Portal.





AUTOMATE YOUR FINANCE WORK PROCESSES

# Invoicing and Payroll

Automated carer time-sheet management and client invoicing, including travel-time and mileage payments.

CareLineLive allows you to create sophisticated contracts for both your clients and carers that have the rules and data on how you wish to pay your carers and invoice your clients.

The contracts allow you a lot of configuration possibilities such as pay and billing rates for non-social hours, fixed rates, travel time, mileage payments and holiday pay.

Using these contracts and the time data recorded for client visits, gross carer pay and client invoices can be created with a few clicks. This will save immense amounts of administration time compared to using spreadsheets and manually confirming time sheets.

- ✓ **Streamline payroll and invoicing**
- ✓ **Split billing for part private, part local authority funding**
- ✓ **Integration with 3rd party software such as Sage, Xero, CM2000, ContrOCC and others**

*“Completing payroll and invoicing through CareLineLive is a large selling point as this has been a massive time saver compared with analogue approaches where even on a spreadsheet with preloaded formulas this will require hour allocations to be input. Once the pay rates and charge rates have been setup in CareLineLive, the software intelligently automates every chargeable call, annual leave, training etc which results in time saving of hours. The larger the company the larger the time and cost save on these tasks.”*

Ian Kibukamusoke  
Director of Technology, Mega Nursing & Care



# Care Planning and

# On-Going Care Management

Allows for person-centred care to be delivered because managers and carers can easily access comprehensive information about each and every client.



## Client Assessments

Understanding people's preferences, likes and needs makes sure your team is fully informed about a client enabling more personalised care to be given. Managers can record client assessments in the Management Portal enabling informed decision-making that impacts care planning and resource allocation.

There are 14 simple to complete, pre-configured templates including about me, conditions and needs, fluids and nutrition and medication management.

Moreover, preferences for food and drink, meals and meal times can be recorded.

If the pre-configured templates are not exactly what you require, you can create your own bespoke template using our FORMS editor.



## Observations

Our observations feature can help your carers and managers monitor changes in a client's condition. Identifying problems quickly can help to keep clients safe and ensure that any concerns are addressed before they get worse. Carers can record observations easily in our Carer Companion App.

Observations that can be recorded include fluid intake, meals, blood glucose, blood pressure, heart rate, weight, catheter output and injuries. Any observation that is recorded via the Carer Companion App is immediately visible to managers in the office and assigned stakeholders within the Care Circle Portal enabling quick intervention, if necessary.



## Incident Reporting and Carer Concerns

Our incident reporting feature provides a simple and effective way to record and manage incidents within a client's home and helps keep clients safe.

Carers can flag a concern about a client in the Carer Companion App. Managers are notified of relevant concerns and can view how urgently the carer feels it needs to be addressed and any associated comments.

Incident reports can be started from a carer concern or afresh in the Management Portal to ensure that actions are taken and the appropriate processes are followed.





HELPS MANAGERS EASILY DECIDE WHETHER A NEW CARE PACKAGE CAN BE ACCOMMODATED

# Capacity Planning

Using existing data within CareLineLive, our capacity planning assistant allows managers to confidently and quickly understand whether a new care package can be accommodated given an agency's allocation of carers, considering their location, rotas, and skills.



Reduces the time it takes to complete tender applications for new business opportunities.



Understands whether you have sufficient carers within the location of the new care package request using configurable geofenced areas for carers and teams.



Identifies whether you have carers with the correct skills/traits, e.g. physical lifting restrictions, within the desired location and pinpoints any training that is needed for potential new clients.



Checks whether your staff are available for new care package requests by considering carer schedules, annual leave and any clashing visits.



Helps with staff planning and future carer recruitment needs to maximise profitability.

# Management Reports and Regulatory Compliance

A suite of reports and other tools will inform you on the health and performance of your business and will enable you to evidence how you are complying with your regulatory framework.

Create and customise your own forms for audits, risk assessments and care plans. Schedule carer and client reviews to keep on top of carer training and qualification requirements and changing client needs.

Real time reports with filters provide valuable data and insights which not only allow you to predict and avoid issues but also to make important business efficiencies and improvements.



**Easily provide evidence for compliance purposes at the click of a mouse:**

- ✓ Auditing - the trail of rostering changes is fully documented. eMAR chart allows auditing of medication administration easy
- ✓ Carer and client reviews – schedule reviews and spot checks to improve compliance and performance standards
- ✓ Carer training and requirements – ensure all carer training and qualifications are up-to-date with our reporting and alert functions
- ✓ Contingency planning – react quickly when the unexpected happens, improve risk management and plan more effectively
- ✓ Document storage against clients and carers with the option to make them viewable in the Carer Companion App
- ✓ Digital forms including e-signatures - minimise paper records with customisable digital forms streamlining data capture with secure data storage. Send PDF documents for e-signatures to carers, clients and other stakeholders
- ✓ Visit verification – complete visibility of client visits including carer check-in and check-out times, completion of tasks, care provisioning notes and alerts



SECURING YOUR DATA AND MAKING YOUR SOFTWARE AVAILABILITY RESILIENT

# Disaster Recovery and Cyber Security

Online security and 24/7 availability shouldn't be a headache for you to contend with.

With cyber attacks becoming more sophisticated and prevalent you need a software solution with robust cyber security and effective disaster recovery processes at its heart.

With CareLineLive's effective security and back-up systems, and fully compliant data protection measures in place, you can offer carers, clients and their families greater peace of mind.

We take care of keeping your data safe in the cloud. Only accessible by authorised users and no need for local back-ups. Point in time recovery back-ups are available in five minute increments and nightly server snapshots are retained for 35 days.

**Our security credentials:**

- ✓ ISO 9001: Quality Management and 27001: Information Security Management certified
- ✓ NHS Data Security Protection Toolkit compliant
- ✓ Regular automatic vulnerability scanning and penetration tests by independent third-party cyber security firms
- ✓ Cyber Essentials Certified



ISO 27001 : 2013  
9001 : 2015  
INTEGRATED MANAGEMENT SYSTEM  
REGISTERED  
Certificate No.369912021





PERSONAL AND HUMAN SUPPORT TO HELP YOU BECOME SUPER-USERS

# Onboarding and On-Going Support

Rightly so, our customers demand the best service and we deliver this.

At CareLineLive, not only do we place great importance on what we deliver, but how we deliver it. Our team have several years of expertise within the home care sector and understand the challenges home care agencies face.

We will ensure a stress-free onboarding process during which our expert staff will train you and demonstrate how to fully benefit from CareLineLive.

And it doesn't stop there, once CareLineLive is integrated into your business, you'll have access to our friendly, helpful team who will be quick to respond if you have any questions or need help.

Our support team can be easily contacted by phone, email or help messenger tool.

*'CareLineLive has been superb in onboarding us when we first started using the platform. Their customer support team are not only good at training but also in helping with day to day queries about how to achieve certain objectives we have using their software. They are approachable and we've found it easy to use their telephone and email support channels.'*

David Johnson  
Managing Director, My HomeCare Franchise Group

# CareLineLive is an All-In-One Home Care Management System

We understand that home care agencies are all different and have different requirements of a care management system. This features and benefits matrix shows which features are available with each interface of CareLineLive so you can make the right choice in deciding how you want to use CareLineLive.

	 Management System	 Carer App on Managed Phones	 Carer App on Carer's Own Phone	 Care Circle Portal
<b>All features</b>				
Cloud-hosted, easily accessible via the internet and mobile phones	✓	✓	✓	✓
Rostering and care management	✓			
Fully managed handsets with inclusive voice, SMS and data package. And remote device management.		✓		
Tasks including medical administration (eMAR)	✓	✓	✓	
↳ MAR Charts	✓	✓	✓	
↳ Alertable tasks	✓	✓	✓	
Real time rota access	✓	✓	✓	
Call monitoring offering real-time visit information	✓	✓	✓	✓
Care planning tools including assessment templates, bespoke forms, incident reporting, carer concerns and observations recording	✓	✓	✓	
Body Maps	✓			
Paperless record keeping inc. electronic signatures	✓	✓	✓	
Invoicing and payroll	✓			
HR administration (including carer reviews & training matrix) and capacity planning	✓			
Reporting for auditing and performance purposes	✓			
Integrations with Sage, Xero, CM2000, ContrOCC	✓			
Enterprise-level data security and back-ups	✓			
Continuous product development with updates seamlessly administered	✓	✓	✓	✓
Clear, simple and easy-to-use interface	✓	✓	✓	✓
Simple, honest, transparent pricing	✓	✓	✓	✓

# Better systems mean better care but don't just take our word for it.

“CareLineLive transformed our service from paper to digital, enabled us to significantly increase our capacity year-on-year, and helped us deliver on our top priority of providing high quality patient care”



**John Walter**

Mid and South Essex NHS  
Foundation Trust

“CareLineLive is multi-functional as it automates timesheets, our payroll and invoicing. It increases staff safety, helps us manage day-to-day challenges and helps us improve our reporting for CQC and business accounting purposes”



**Ronnie Chatterton-Sim**

Coastal Homecare

“We've seen huge benefits from the technology across the business. From carers and homecare managers to families and patients, going digital has enabled increased communication and efficiency across our six sites. Staff now have tools to work more efficiently, from updating care plans to acknowledging changes in medication using eMAR. Our care teams have all recognised the positive impact of digitising traditional processes”



**Adam Baki**

Operations Director - Delta Care

“Unlike our previous system, we were looking for a system that was user friendly... with CareLineLive our processes are more automated so it's reduced our workload and made our lives a lot easier”



**Ali Sharif**

Director of Communications  
Sunlight Care Group

“The CQC are looking to see that we keep people safe with their medicines but also that we meet their needs. Working with CareLineLive's eMAR has removed any restrictions to a client's care as changes can be made immediately”



**Claire Flynn**

Brightening Lives



Family and Friends

Emergency Services

One-time secure access

Carers

Health Professionals

Home Care Managers

Regulators

## Helping to Complete the Circle of Care

Would you like to streamline and digitise your processes, improve productivity and provide better care? We'd love to show you how CareLineLive can help your home care business to:

- ✓ Improve efficiency, capacity and compliance
- ✓ Ensure easy rostering, payroll and invoicing
- ✓ Enables person-centered responsive care
- ✓ Keep family and key stakeholders informed



CareLineLive

DISCOVER THE DIFFERENCE WITH CARELINELIVE  
carelinelive.com | 03300 885 767 | info@carelinelive.com