



Adding, Inviting, or Deleting Pro Caregiver Profiles



Adding, Inviting, or Deleting Pro Caregivers Profiles

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Introduction



Carefolk enables you to set-up your care team and manage it in a fluid and seamless way.

Each Caregiver has a profile which houses all of their relevant information, and contains great functionality, like quick messaging, automated digital timecards, scheduling, training, and much more.

Carefolk empowers both you, and them, to work better, collaborate easier, and provide great care service.

It automates many of those functions that eat up so much of your time, and greatly reduces the friction in yours, and your team's daily professional life.

You can either **manually add a Caregivers profile yourself**, or **invite them by email** where they can add their own profile.

Simple. Beautiful. Easy-to-use.

2 Adding or Inviting Pro Caregivers

Manually Adding a Caregiver

Adding a Carer

Select Carer from the top navigation panel.



Then click on +Add New Carer.

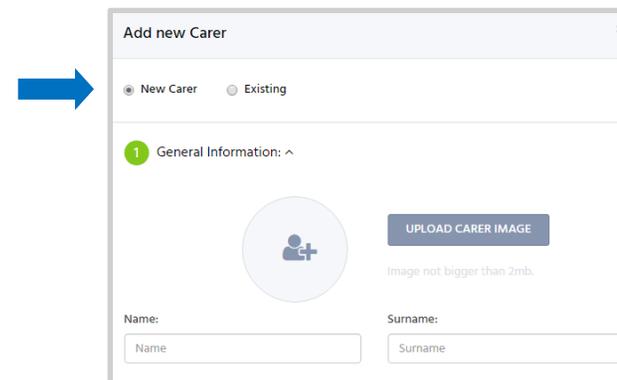


Manually Add a Carer

To **manually add** a Carer, select **New Carer**.

Note: If inviting a Carer by email, select Existing. (Caregiver completes their own profile)

Skip ahead to **section 3** for instructions on this.



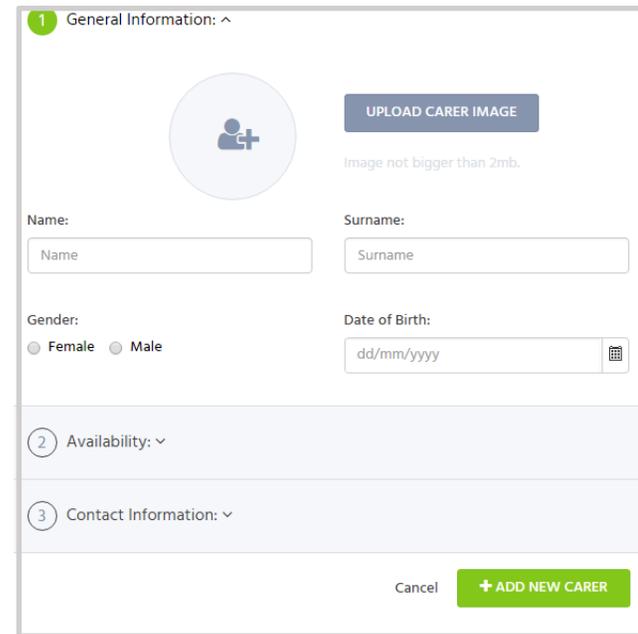
2 Adding or Inviting Pro Caregivers

Manually Adding a Caregiver

General Information

Follow the steps 1 to 3 and complete the basic info including the **Name, Gender, and Date of Birth** of the Caregiver you are adding.

Tip: You can upload a profile image for the Caregiver or let them add one themselves when they sign in.



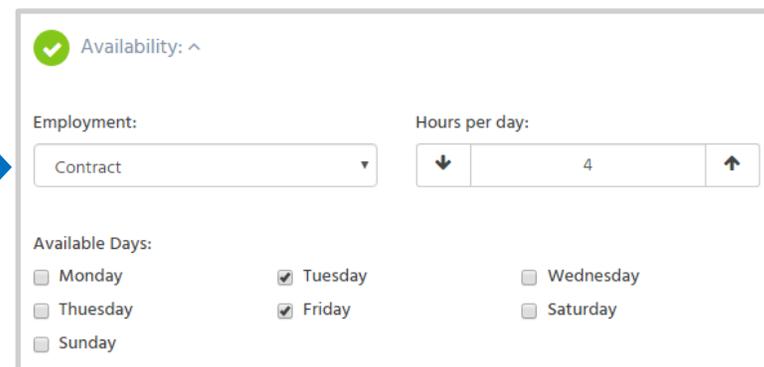
The screenshot shows the 'General Information' form. At the top, there is a section for uploading a profile image with a button labeled 'UPLOAD CARER IMAGE' and a note 'Image not bigger than 2mb.'. Below this are input fields for 'Name' and 'Surname'. There are radio buttons for 'Gender' (Female and Male) and a date picker for 'Date of Birth' with the format 'dd/mm/yyyy'. At the bottom, there are two expandable sections: 'Availability' and 'Contact Information'. A 'Cancel' button and a green '+ ADD NEW CARER' button are at the bottom right.

Availability

Select whether the **Employment** is Full Time, Part time or Contract.

Type in the number or use the arrows change the maximum number of **hours per day** they can work.

Tick the boxes of which **days of the week** they can work.



The screenshot shows the 'Availability' form. It has a green checkmark icon and a dropdown arrow. There are two main sections: 'Employment' with a dropdown menu set to 'Contract', and 'Hours per day' with a numeric input field set to '4' and up/down arrows. Below these are 'Available Days' with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, and Sunday. Tuesday and Friday are checked.

2 Adding or Inviting Pro Caregivers

Manually Adding a Caregiver



Contact Information

Complete the **contact details** for the Caregiver.

Note: Take care to type in the **correct email address** for the Caregiver. This is the email address that they will use to sign in with later. They will receive an email asking them to confirm and to select a password.

Note: Including a home address will allow Carefolk to automatically calculate incurred travel expenses based on the distance between the Pro Caregiver's home and the Client's address. It also enables the Client-Caregiver optimized matching



3 Contact Information: ^

Email:

Address Line 1: Address Line 2:

Town: City:

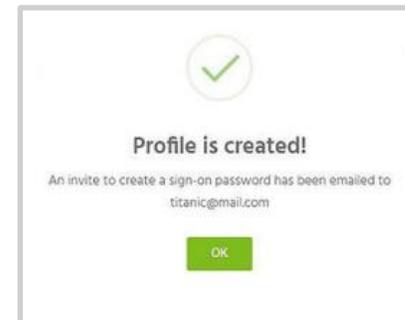
Country: Zip Code:

Home Phone Number: Home Mobile Number:



When you have completed the details, simply click 'Add New Carer'

Congratulations! You've added a Caregiver 😊 The Professional Caregiver will receive an email to set up a password and sign-in. Tip: If the Carer never received the email. First ask them to check their inbox and their Spam folder. you can resend the invite by clicking on Add Carer, select 'Existing', enter email address and click Add.



3 Adding or Inviting Pro Caregivers

Inviting a Caregiver by Email



Invite a Carer to your Team

If a Professional Caregivers have an existing Carefolk Profile, or if you want them to complete their own profile, simply **Invite them by email**. They will receive an email invite and can accept it. Our simple onboarding process will guide them through the set-up process.

To invite a Professional Caregiver by email, click 'Add Carer' and select **Existing**. Enter the Caregiver's **email address**.

Tip: As you're typing, their profile may pop up as an option. Select **their profile** or **continue typing** the email address.

Then click on **+**.

Want to invite more than one?

Continue entering email addresses, selecting **+** after

When finished, select **+Send Invitations**

Tip: If the Carer never received the email. First ask them to check their inbox and their Spam folder. You can always resend the invite by clicking on Add Carer, select '**Existing**', enter email address and click **Add**.

Well done! You successfully sent invitations.

4 Adding or Inviting Pro Caregivers

Deleting a Professional Caregiver

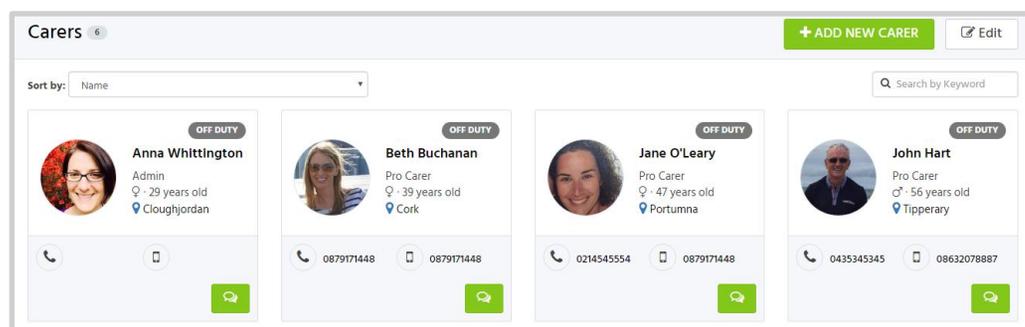
Deleting a Professional Caregiver

If you have made a mistake, invited the wrong person, or have left a Professional Caregiver go, you can delete them by following these steps.

Go to the **Carers** page.



Then select **Edit**



On the Caregiver you wish to **delete**, click the **X** button in the top right corner. You will be asked to confirm deletion.

Note: Be careful. Once you have deleted the profile, you **cannot revert it**.

