

## PURPOSE

This document is an orientation for Beta Testers, describing access and initial discussion of the basic system process to be exercised. References are made to associated detail process documents, which will be made available, or which can be accessed at the STAFF TOOLS page of the Kare Bears web site.

## GETTING ACCESS

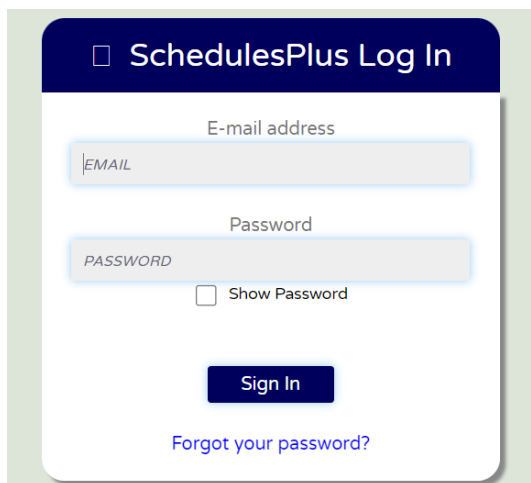
Search for “**SchedulesPlus**” using your search application

It will bring you to this address:  
[schedulesplus.com](https://schedulesplus.com)

You may wish to “bookmark” the site for ease of future access.

Click on that site to see this Log in screen

Use your **email address** and the default password **KBtraining** to Log In



*When we first set you up for this access, you will receive an email from "karebears@schedulesplus.com" indicating that default password. You will see later in this document how to change the password if you wish.*

Each person who has been granted any access to the system is considered to be an “administrator.” The screen presentations for each administrator will display (initially) as two rows of tabs for various functions. Selecting a first-row tab will typically expand the selection of tabs on the second row, to provide access to detailed parts of that main function. A third row is possible, typically further expanding second-row functions.

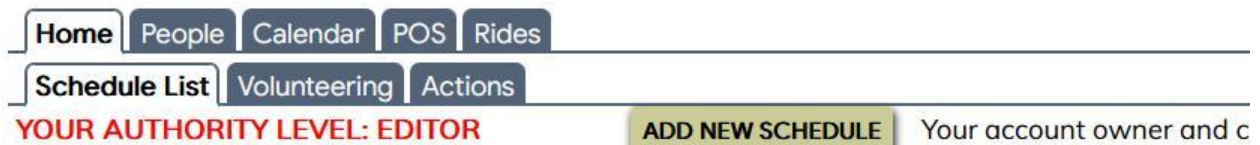
Each Administrator is authorized to specific functions by assigning a set of tabs that they will see, customized to the functions they are authorized to perform.

## A NOTE ABOUT THE TABS SHOWN IN VARIOUS DOCUMENTS

Images of the rows(s) of tabs are used throughout our documentation to show the specific tabs highlighted (white rather than gray) for the particular function being discussed. Please realize that in many cases the image may contain other tabs (in gray) which may not appear on your customized set of tabs. Please disregard those.

## BETA TESTING OFFICE VOLUNTEER FUNCTIONS

As a beta tester, we have authorized you for the functions we expect to be performed by Office Volunteers. Here is what is presented as your HOME screen (but with your name) rather than "Office Default"



*There are other items on the full screen which you can ignore for now.*

The Main tabs you have available are:

- PEOPLE – access to the file of all people interacting with Kare Bears, using any services, volunteering, etc.
- CALENDAR – provides the ability to view the office shift schedule
- POS (Point of Sale) – our main use here is for loaning medical equipment; but donations can be taken, or residents registered for events. The system works on a "shopping cart" philosophy, and considers all these activities as a "sale" even though we do not charge for them
- RIDES – allows for the creation and management of Ride requests
- SCHEDULE LIST – this refers to a schedule of events, not to the Office calendar. You will not have authority to the items listed below "Public Schedules", but we cannot remove their visibility
- VOLUNTEERING – will present the office volunteer shift calendar
- ACTIONS – ignore, but we cannot remove the visibility
- ADD NEW SCHEDULE button – you will not be authorized to this

This document will discuss these items further, with references to individual detailed process documents.

## USING THE PEOPLE TAB

You will be presented with options to Add a new person (button) or search for an existing person (yellow box) for inquiry or edit. It is also possible to drill through alphabet tab to find someone.

Name	Phone #s	Membership
Aalto, Martin	(623) 282-8002 (H)	
Abel, Jackie	(623) 535-7426 (H)	
Abraham, Yolanda	(602) 228-5629 (H) (623) 935-6462 (C)	

- REFERENCE: review document "DESCRIPTION – PEOPLE DATABASE"
- REFERENCE: review document "ADD OR EDIT A 'PEOPLE' RECORD"

## USING THE CALENDAR TAB

The Calendar tab on the first row has already brought up the associated VOLUNTEERING tab on the second row

Clicking the tab will display the current month Office Volunteer calendar.

## USING THE VOLUNTERING TAB

Since we are testing, many dates in July have no volunteers signed up, or just one. Therefore, those boxes are not yet green. Those slots will be filled in as people sign up for the shifts through the Portal.

Home Save Filters

Schedule List | Volunteering

Help Needed-Calendar

All Schedules | All Roles | No Wknds | 1-line title | Name: FI LASTNAME | Single space | Normal font | Time (10a) | Start time only | Compact cells

Goto: Jul 2024 | Event Name | FILTER | CLEAR | PRINT

< > TODAY Month Week Day July 2024

Mon	Tue	Wed	Thu	Fri
1 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...J Korba ...P Somers	2 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...D Johnson ...P Granata	3 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...J Duss ...J Werner	4 9a Office Staff Mornings --Cancelled Needed: 2 ... Filled: 0	5 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...K Bates ...L Prom
8 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...R Holmes ...L Prom	9 8a Hearing Evaluation Needed: 2 ... Filled: 1 ...D Johnson 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...J Duss ...J Werner	10 9a Office Staff Mornings Needed: 2 ... Filled: 2 ...J Duss ...J Werner	11 9a Office Staff Mornings Needed: 2 ... Filled: 0	12 9a Office Staff Mornings Needed: 2 ... Filled: 0
15 9a Office Staff Mornings Needed: 2 ... Filled: 1 ...J Korba 9a Office Volunteer Trainer Needed: 2 ... Filled: 2 ...J Duss ...J Werner 9a Office Volunteer Trainee Needed: 2 ... Filled: 0 10a Office Volunteer Trainee Needed: 2 ... Filled: 0 11a Office Volunteer Trainee Needed: 2 ... Filled: 0	16 9a Office Staff Mornings Needed: 2 ... Filled: 1 ...N Hume 9a Office Volunteer Trainer Needed: 2 ... Filled: 2 ...A Lewis ...G Seymour 9a Office Volunteer Trainee Needed: 2 ... Filled: 0 10a Office Volunteer Trainee Needed: 2 ... Filled: 0 11a Office Volunteer Trainee Needed: 2 ... Filled: 0	17 9a Office Staff Mornings Needed: 2 ... Filled: 0 9a Office Volunteer Trainer Needed: 2 ... Filled: 2 ...J Werner ...P Granata 9a Office Volunteer Trainee Needed: 2 ... Filled: 0 10a Office Volunteer Trainee Needed: 2 ... Filled: 0 11a Office Volunteer Trainee Needed: 2 ... Filled: 0	18 9a Office Staff Mornings Needed: 2 ... Filled: 1 ...L Prom 9a Office Volunteer Trainer Needed: 2 ... Filled: 2 ...M Dlouhy ...P Granata 9a Office Volunteer Trainee Needed: 2 ... Filled: 0 10a Office Volunteer Trainee Needed: 2 ... Filled: 0 11a Office Volunteer Trainee Needed: 2 ... Filled: 0	19 9a Office Staff Mornings Needed: 2 ... Filled: 1 ...S Nardick 9a Office Volunteer Trainer Needed: 2 ... Filled: 1 ...G Seymour 9a Office Volunteer Trainee Needed: 2 ... Filled: 0 10a Office Volunteer Trainee Needed: 2 ... Filled: 0 11a Office Volunteer Trainee Needed: 2 ... Filled: 0

To see the details for a given day, click in that box - to show the names, phone numbers (and email addresses) of those volunteers. *Although the system will allow you to Add or Delete persons for that day, please do not do so until we establish guidelines,*

Roster

Volunteers (Master) | Volunteers 7/03/24 | Volunteers for all Instances | Office Staff Mornings 7/03/2024 9:00am

ADD SOMEONE | EMAIL 7/03/24 VOLUNTEERS | TEXT 7/03/24 VOLUNTEERS | CREATE LETTER

Name	Telephone	eMail
Duss, Jeanne	(760) 218-5233 (C)	jduss911@gmail.com
Werner, Jo	(623) 606-1548	jowerner1@gmail.com

Use your browser's BACK button to return to that month's calendar. Or click HOME and then VOLUNTEERING again.

If you use the arrow controls to move forward - to September for example), you will see that the "Office Staff Afternoon" shifts are listed as well as the Morning slots

- REFERENCE: review document "PROCEDURE - SCHEDULE VIEW"

## USING THE "POS" TAB

We use the system "Point of Sale" process primarily to loan medical equipment, however it also can be used to register residents for events, to take a donation, or to actually sell items (like our flashing light)

*(Note: the GROUPS tab is no longer being shown)*

Clicking the tab begins with the FIND A PERSON search box, since the "customer" must be identified. In the example below, Otto has already been selected by that step, and now the POS options display screen is shown.

- Click on LOAN to initiate the loan process.
  - REFERENCE: review document "PROCEDURE – PROCESS A LOAN"
  - REFERENCE: review document "PROCEDURE – PROCESS A RETURN"
  - REFERENCE: review document "MANAGING LATE RETURNS"
  -
- Not further discussed at this time
  - Click on HEALTH WELLNESS to register a resident for an event
  - Use the DONATION area to take a donation
  - Click on SALE to sell priced items

The screenshot displays the SchedulesPlus interface with the 'POS' tab selected in the top navigation bar. Below the navigation bar, there are tabs for 'Sell', 'Receipts', and 'Reports', with a red instruction: "To add/update items to the cart, click the green ADD TO or UPDATE CART". A search box contains the text 'otto', and a 'FIND PERSON' button is visible. The search results show 'OTTO ROHLEDER'. Below this, there are buttons for 'HOME', 'HEALTH WELLNESS', 'ALL OTHER', 'LOAN', and 'SALE'. The 'HOME' button is highlighted. Below the buttons, there is an 'Item Search...' field, a 'SEARCH' button, and checkboxes for 'MO', 'TU', 'WE', 'TH', and 'FR'. A 'CLEAR ITEM SEARCH' button is also present. At the bottom, there is an 'ADD A DONATION' section with a dropdown menu for 'Choose a Category', an 'Amount' field with the value '0', a 'Note' field, and an 'ADD TO CART' button.

## USING THE RIDES TAB

Clicking his tab first presents a listing of currently created rides. Management of already “booked” Rides will be discussed in a document being drafted: “MANAGING RIDES”

The screenshot shows the 'Rides' tab interface. At the top, there are navigation tabs: Home, People, Groups, Calendar, POS, and Rides. Below this, there are sub-tabs: Assign by Driver, Rides List by Driver, Drivers, and Reports. The main area is titled 'Rides by Date' and includes a 'Working' indicator and a 'Rides Calendar' view. A filter bar shows 'Rides shown: 1'. The filter options include: Specific Date (07/17/2024), Range (07/17/2024 through 07/17/2024), Status (ALL), Sort by (Ride Start), Category/Purpose (ALL), and Locations (All). On the right, there are dropdown menus for Specific Ride Id, Return Leg, Accommodation(s), and Group. At the bottom right, there are buttons for 'ADD RIDE' and 'DRIVERS 7/17'. Below the filters is a table with columns: All?, Date, Time, SEQ, RIDER, DRIVER, PickUp Location, DropOff, Est Miles, Actual Miles, Odom, ApptTime, ActualEnd, Units, and Driver Hrs. A single ride is listed with ID #2601532, date 7/17/2024, time 9:00am, rider Rohleder, Otto, and driver PELLETIER, Dave. The pickup location is HOME 14973 W Robson Cir N Goodyear AZ 85395-8864 and the drop-off is Mayo Clinic Building SCT-113400 E Shea Blvd Scottsdale AZ 85259. The duration is 2:00 hrs and the purpose is MEDICAL H (847) 536-1590.

Click the ADD RIDE button at the right to initiate creating a new Ride request.

Again, you will be prompted to identify the person who will be the rider, using the typical person SEARCH process.

Once the rider is identified, the system presents the ADD A NEW RIDE entry screen. This replaces but emulates our paper Transportation Request Form

The screenshot shows the 'ADD A NEW RIDE' entry screen. At the top, there are navigation tabs: Home, People, Groups, Calendar, POS, and Rides. Below this, there are sub-tabs: Assign by Driver, Rides List by Driver, Drivers, and Reports. The main area is titled 'Rides by Date' and includes a 'Working' indicator and a 'Rides Calendar' view. A filter bar shows 'Add New Ride' and '(✓)=Google Verified Address'. The form has buttons for 'SAVE' and 'CANCEL'. The form fields include: Name (Otto Rohleder), Address (14973 W Robson Cir N, Goodyear, AZ 85395-8864), Date/Time (Date..., Time..., Duration: .33 (hrs)), Repeats (Does not repeat), Appt Time (optional...), Starting Location (14973 W Robson Cir N Goodyear AZ 85395-8864), Destination (Mayo Clinic Building SCT-113400 E Shea Blvd Scottsdale AZ 85259 (✓)), Add Return Leg? (WILL CALL for return ride? No), Category/Purpose (Select..), Driver, Notes, Units (1 (If left blank, defaults to 1)), and Fee for this ride.

- REFERENCE: review document “PROCEDURE – PROCESS A RIDE”

## EMAIL

The system provides frequent usage of email.

- REFERENCE: review document "SENDING EMAIL"

## CHANGING YOUR PASSWORD

You may continue to use the temporary password, or

Click on YOUR name (next to 'LOG OUT') then click the EDIT button.

Then Key in:

- your current password
  - your new password
  - confirm the new one
- Click SAVE

*Note the rules for creating a password*

*You will be prompted to change your password every six months*

LOG OUT > Scott Pelletier > PebbleCreek Kare Bears > Scott Pelletier

Profile Home

**EDIT** Select EDIT to change your password or your name

Email: pcmrc@cox.net  
First Name: Scott  
Last Name: Pelletier

LOG OUT > Scott Pelletier > PebbleCreek Kare Bears > Scott Pelletier

Profile Home

Change your USER name and/or your PASSWORD

Email: pcmrc@cox.net  
First Name:   
Last Name:   
Current Password:   
Enter New Password:   
Confirm New Password:

Password Rules:

- 8-16 characters long
- contains at least 1 number
- contains at least 1 uppercase character
- contains at least 1 lowercase character
- contains at least 1 symbol (\*, \$, %, +, -, #, @, !, &, etc.)

**SAVE** **CANCEL**

## FINALLY

Please use the LOG OUT button next to your name to end your session. You will also be asked to confirm the log out on another short screen.