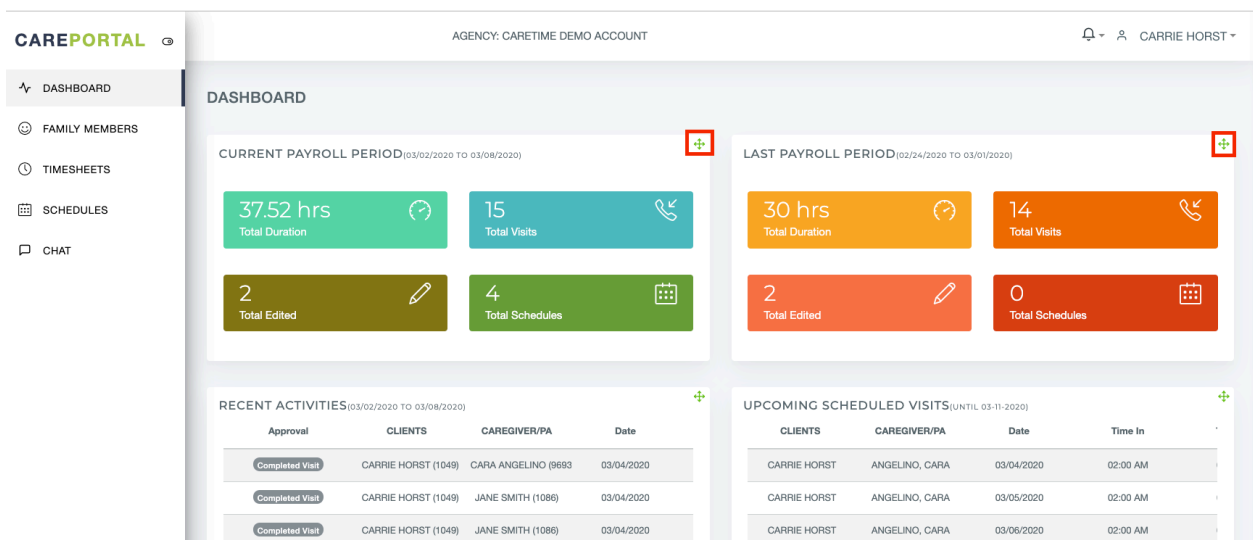


Consumer Manual

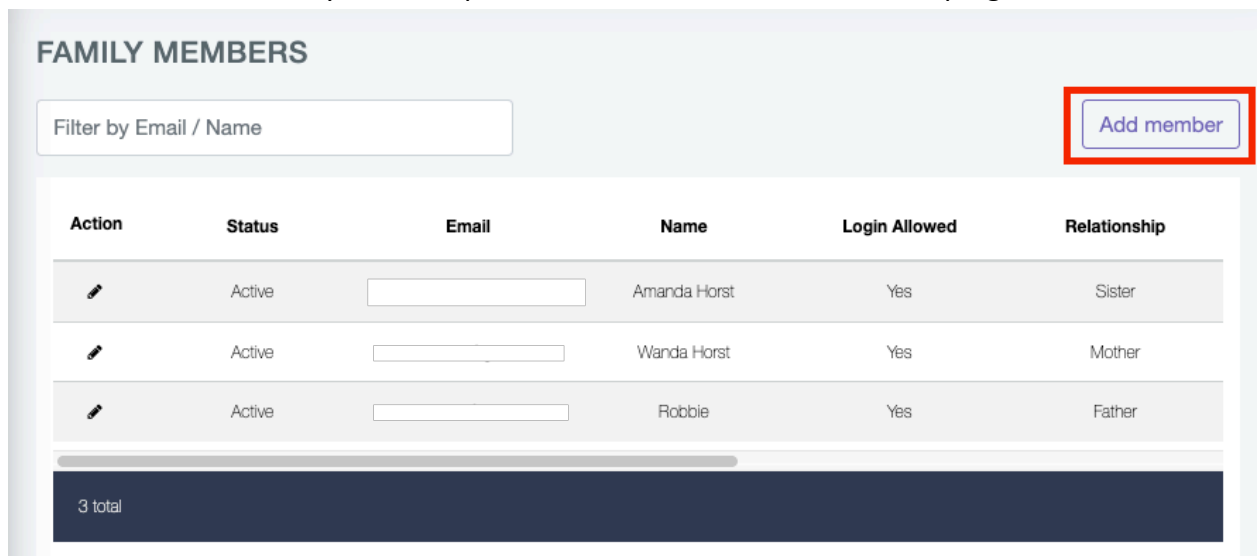
Available Modules

Based on settings chosen by your agency administrators, when logging in, you will see a list of modules available in the left-hand menu

- **Dashboard**
 - View summary statistics, upcoming scheduled visits, recent activities, notifications, and notes written by your caregiver.
 - You can move the modules by clicking and dragging the green arrows in the top right corners




- **Family Members**
 - Here is where you can add and edit family member profiles
 - To add a family member profile, click "Add Member" in the top right corner



- In order to add a member, you have to fill out the fields shown below

ADD MEMBER

 Member Info




FULL NAME	<input type="text" value="Full name"/>
E-MAIL	<input type="text" value="E-mail"/>
RELATION	<input type="text" value="Relation to Patient"/>
PASSWORD	<input type="text" value="Password"/>
CONFIRM PASSWORD	<input type="text" value="Confirm Password"/>
ALLOW LOGIN	<input checked="" type="checkbox"/> Yes
PERMISSIONS	<input type="checkbox"/> Add Timecard <input checked="" type="checkbox"/> Edit Timecard <input type="checkbox"/> Add Family Member <input type="checkbox"/> View Family Members
STATUS	<input checked="" type="checkbox"/> Active

- Allow login: If set to “Yes” this member will be able to log in to the application
 - Permissions: Set what modules your family member can edit or see
 - Status: You can set their profile to “Active” or “Inactive”
- The password you set will be sent to them in an email so they can log in

- If you ever want to edit a profile, click the pencil icon next to that family member's name

FAMILY MEMBERS

Filter by Email / Name Add member

Action	Status	Email	Name	Login Allowed	Relationship
	Active	<input type="text"/>	Amanda Horst	Yes	Sister
	Active	<input type="text"/>	Wanda Horst	Yes	Mother
	Active	<input type="text"/>	Robbie	Yes	Father

3 total

- **Timesheets**

- View a list of timesheets completed by your caregiver(s) for the week
- You can filter for a caregiver
- You can see more columns by clicking “expand” in the top right corner and selecting the radio button next to the column you would like to add

TIMESHEETS ADD + ↓

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Expand

TIMESHEETS ADD + ↓

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Collapse

Location Type Notes Created By Created On IN Status OUT Status

Action	Approval	CLIENTS	CAREGIVER/PA	Date	Time In	Time Out	Duration	IN Status	Created By
--------	----------	---------	--------------	------	---------	----------	----------	-----------	------------



- You can view the previous week or next week by clicking the purple arrows in the top right

TIMESHEETS ADD + ↓

Filter by Name ← 03/02/2020 to 03/08/2020 →




Column Options Expand

- You can view more details of a particular shift by clicking the eye icon



TIMESHEETS ADD  

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Expand




Action	Approval	CLIENTS	CAREGIVER/PA	Date	Time In	Time Out	Duration
	Completed Visit	CARRIE HORST (1049)	CARA ANGELINO (9693)	03/04/2020	01:31 PM	01:33 PM	0:2
	Completed Visit	CARRIE HORST (1049)	JANE SMITH (1086)	03/04/2020	10:00 AM	12:00 PM	2:0
	Completed Visit	CARRIE HORST (1049)	JANE SMITH (1086)	03/04/2020	10:00 AM	12:00 PM	2:0

- You can edit the timecards (if enabled) by clicking the pencil icon


TIMESHEETS ADD  

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Expand

Action	Approval	CLIENTS	CAREGIVER/PA	Date	Time In	Time Out	Duration
	Completed Visit	CARRIE HORST (1049)	CARA ANGELINO (9693)	03/04/2020	01:31 PM	01:33 PM	0:2
	Completed Visit	CARRIE HORST (1049)	JANE SMITH (1086)	03/04/2020	10:00 AM	12:00 PM	2:0
	Completed Visit	CARRIE HORST (1049)	JANE SMITH (1086)	03/04/2020	10:00 AM	12:00 PM	2:0

- From there, you can make edits to the start time/day and end time/day
- Click update when you are done
- If employee approval is needed for timecard edits, you will see an orange oval that says: Waiting for Caregiver

	Waiting for CAREGIVER/PA	CARRIE HORST (1049)	CARA ANGELINO (9693)	03/02/2020 03/02/2020	02:03 PM 02:03 PM	02:06 PM 02:30 PM	0:1 0:27
-------------------------------------------------------------------------------------	--------------------------	---------------------	----------------------	--------------------------	----------------------	----------------------	-------------

TIMESHEETS ADD  

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Expand

- You can download a pdf of the timecards by clicking the downward arrow button in the top right
- You can create a new timecard (if enabled) by clicking the “Add +” button in the top right

TIMESHEETS **ADD**

Filter by Name ← 03/02/2020 to 03/08/2020 →

Column Options Expand

- You can enter the fields shown below to add the new timecard

Add Timecard ×

CAREGIVER/PA Name:

CLIENTS Name:

Start Date:

Start Time: :

End Date:

End Time: :

Duration:

Authorization:

Activity Code:

Notes related to this entry

Add Timecard

- At the bottom of each week's timecards, you will be able to see the authorized hours for the week, the total hours worked, and the difference between the two.
- To sign off on the hours worked, check the box that says click here to E-sign then click approve

Authorized Hours	Total Hours	Difference	Approval	Action
70.00	37.52	32.48	<input type="checkbox"/> Click here to E-Sign.	Approve

- If a timecard has been added after you already approved the timesheet for the period or there is a visit pending for employee approval for the previous 30 days, you will see an orange notification next to the Timesheets menu option
 - The current pay period is not included in the 30 days, so current unapproved visits will not be included in this notification

AGENCY: CARETIME DEMO

CARRIE HORST

TIMESHEETS

Filter by Name View in your browser Timezone (default) 05/17/2020 to 05/23/2020

Approval Pending 4 Collapse

Visits Pending for Employee Approval. 05/15/2020 01:59 AM Visits not Approved for Payroll. 05/20/2020 05:00 AM 05/19/2020 05:00 AM 05/18/2020 05:00 AM

Column Options Expand

Action	Approval	CONSUMERS	CAREGIVER/PA	Date	Time In	Time Out	Duration
	Completed Visit	CARRIE HORST	CARA RODRIGUEZ	05/23/2020	01:59 PM	02:59 PM	1:0
	Completed Visit	CARRIE HORST	CARA RODRIGUEZ	05/21/2020	09:20 AM	09:22 AM	0:2
	Completed Visit	CARRIE HORST	JANE SMITH	05/21/2020	04:30 AM	05:30 AM	1:0
	Completed Visit	CARRIE HORST	JANE SMITH	05/21/2020	04:30 AM	05:30 AM	1:0
	Completed Visit	CARRIE HORST	CARA RODRIGUEZ	05/20/2020	05:00 AM	08:00 AM	3:0
	Completed Visit	CARRIE HORST	CARA RODRIGUEZ	05/19/2020	05:00 AM	08:00 AM	3:0
	Completed Visit	CARRIE HORST	CARA RODRIGUEZ	05/18/2020	05:00 AM	08:00 AM	3:0

0 selected / 7 total

- The individual visits pending employee approval or visits not approved for payroll will appear if you expand the Approval Pending box towards the top of the screen
 - Clicking on one of the dates will bring you to that pay period's timesheets
 - Clicking on the orange exclamation point next to the visit will allow you to approve the timecards for payroll if they were added after you had already approved the timesheet for that period

- **Schedule**

- The schedule shows when your caregivers are scheduled to come in
- You can see the schedule at the month view, week view, or day view by clicking the one you want in the top right

- You can see today, the previous day (or month or week), or the next day (or month or week) by clicking the one that you want in the top left corner

SCHEDULE

[Previous](#) [Today](#) [Next](#)
MARCH 2020
[Month](#) [Week](#) [Day](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
			●	●	●	●
● CLIENTS : CARRIE HORST, CAREGIVER/PA : ANGELINO, CARA						
8	9	10	11	12	13	14
●	●	●	●	●	●	●
15	16	17	18	19	20	21

- If you want to see more details such as the start and end times, click on your name and the caregivers name
- If enabled, you can add a scheduled visit by clicking the +Add Shift in the top right

SCHEDULE

[Previous](#) [Today](#) [Next](#)
MAY 10 - MAY 16, 2020
[Month](#) [Week](#) [Day](#)

[+ Add Schedule](#)

	Sunday May 10	Monday May 11	Tuesday May 12	Wednesday May 13	Thursday May 14	Friday May 15	Saturday May 16
12 AM							
1 AM		● CLIENTS : CARRIE HO...					


- This will open up the schedule details that you can fill out
- If enabled, you can edit shifts as well
 - When clicking on a shift from the schedule, you will see the shift details pop up along with the option to modify the shift

Shift Detail ✕

Starts At: 05/11/2020 01:00 AM
Ends At: 05/11/2020 03:00 AM
Total duration: 2 Hours
CLIENTS : CARRIE HORST
CLIENTS ZONES : CARETIME OFFICE EMPLOYEES
CAREGIVER/PA: ANGELINO, CARA
CAREGIVER/PA ZONES: FLORIDA
Authorization: ANTHEM (Daily 3870 Hrs)
Recurrence Shift: No
Notes: -

✕

Modify Current Shift Close

05-14-2020  U4 : 23 PM

CLIENTS Name: (1049) CARRIE HORST
CAREGIVER/PA Name: CAREGIVER/PA
ZONE: CARETIME OFFICE EMPLOYEES

Notes related to this entry

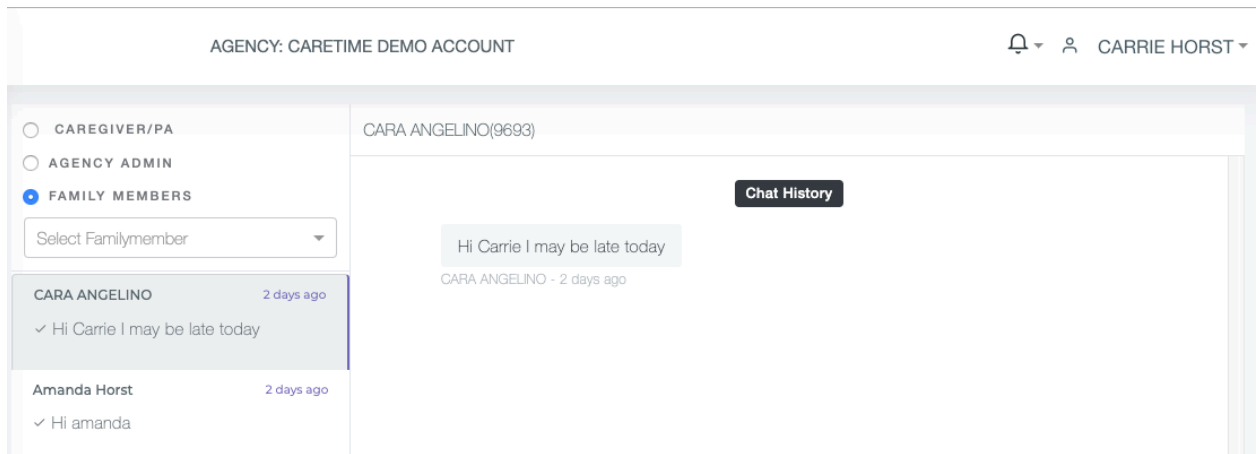
Recurrence No

Add Shift Close

- **Chat**

- If chat is enabled, you will be able to message agency admins, family members, and caregivers that are registered with CarePortal
- You can select the user type you want to message

- A dropdown will populate with all the registered users below that
- Select the person you want to chat with, and a thread will be created



Your Profile

You can view your profile information by clicking your name in the top right corner and then "My Profile"

- Your basic information will be auto populated from your CareTime profile

Changing Your Password

Click your name at the top right corner then select "Password Change"

- You will be prompted to insert your current password and the password you would like to change it to
- If you ever forget your password there is a "Forgot Password?" link on the login page

Logging Out

To log out, click your name at the top right corner, then select "logout".