CARESOFT
Software for Health Caregivers

Innovative, Integrated and Easy to use software for the Mental Health and Child Development industry

Website: info@caresoft.us **Phone:** (479) 439-4982 **Email:** info@caresoft.us

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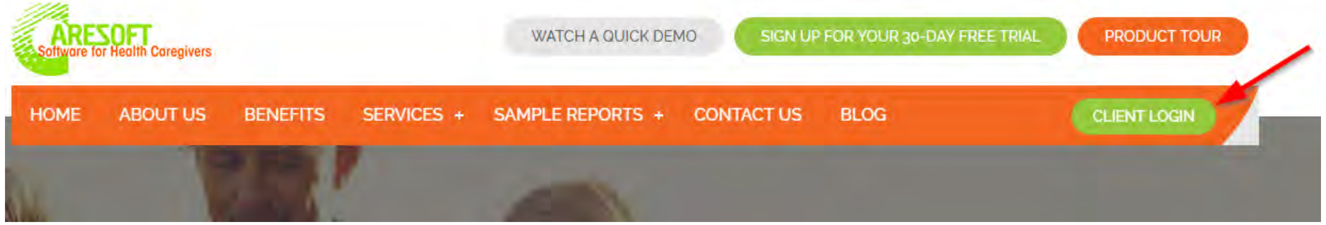
GETTING STARTED

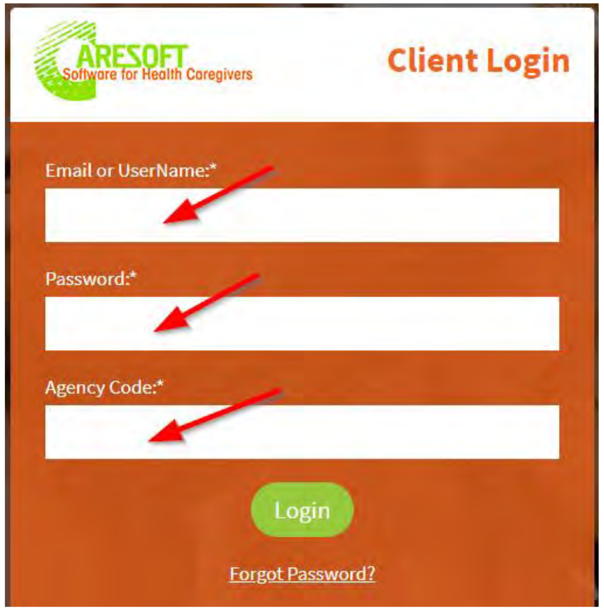
Agency Set Up **Slide#**

LOG IN

- Get Started - Login
  1. Website - https://caresoft.us/
  2. Click “Client Login” button



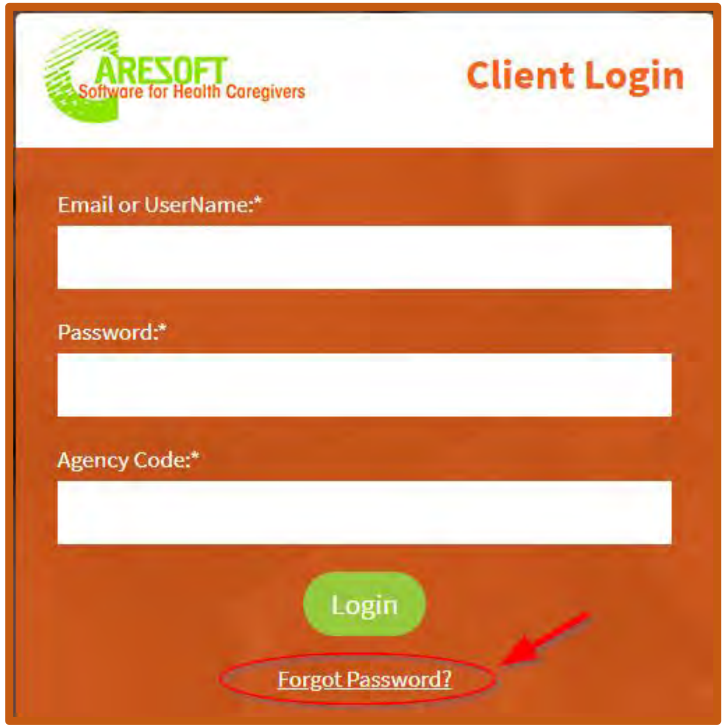
  3. Enter Email/User Name, Password & Agency Code, then click “Login” button



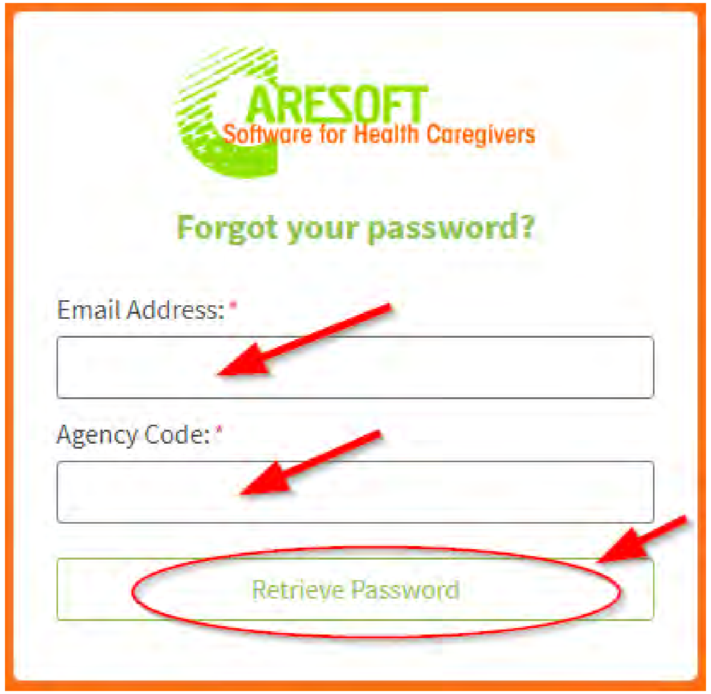
RESET PASSWORD

➢ Forgot/Reset Password

1. Click “Forgot Password?” Link in the Client Login Page



2. In the next screen enter the Email Address & Agency Code then click “Retrieve Password” button



3. You will receive an email with a link that you will click on to reset the password. If you don’t receive an email within 15 minutes check your spam folder

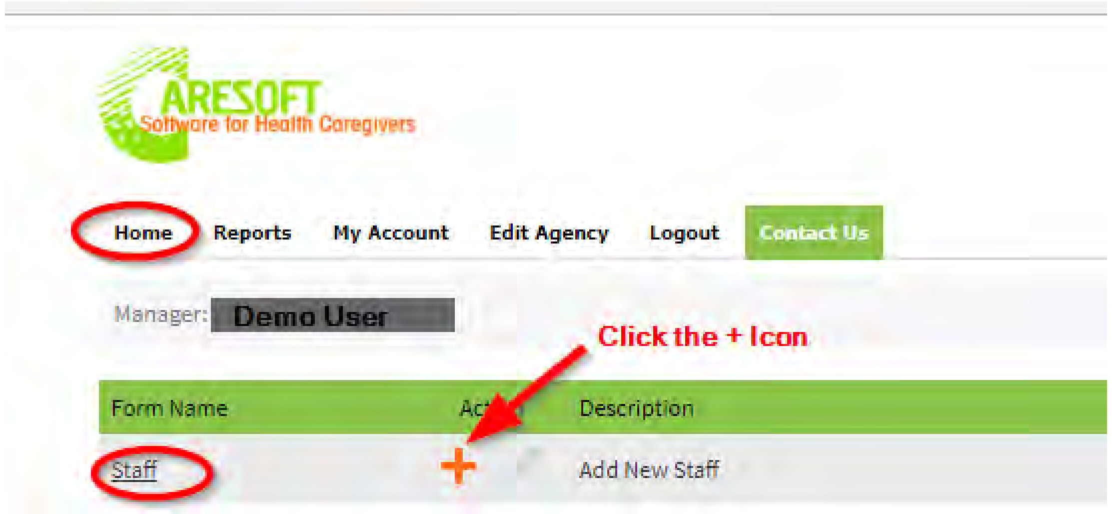
ADD STAFF (Employees)

- Staff –

  Use Case: This is where you add New Staff (Employees)

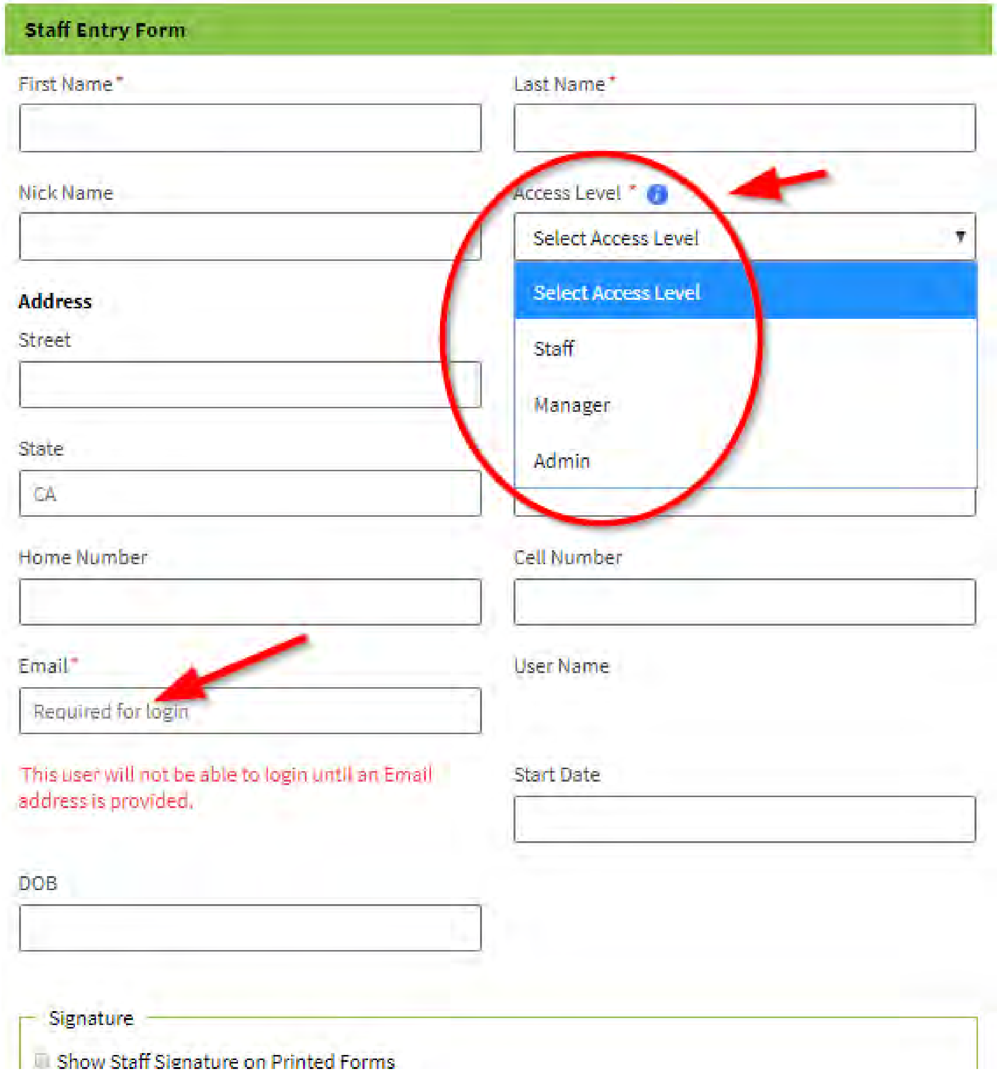
  <u>Process:</u>

  1. Click the “Home” Tab (See pic)
  2. Next to the Form Name “Staff”, Click “**+**” icon



ADD STAFF (Employees)

3. The Staff Entry Form will be displayed
4. Enter the staff information
5. Under the “**Access Level**” field, you can choose Staff or Manager or Admin by clicking the drop-down menu (See pic)
    - **Admin level** has full access to every feature
    - **Manager level** has access to every feature except “Edit Agency” feature
    - **Staff Level** has restricted access (non admin level), used for all staff
6. “**Email**” must be entered accurately. User will not be able to log in if email is not populated



ADD STAFF (Employees)

7.“**User Name”** will be auto created once the account is set up and will be sent to the email provided

8. The “**Signature**” section (see pic) is where the staff will upload their signatures that will be used/printed in all forms/reports. Two ways to create a signature i.e.

I. You can use “**My Live Signature”** link and follow the process or

II. Upload signature from the saved file

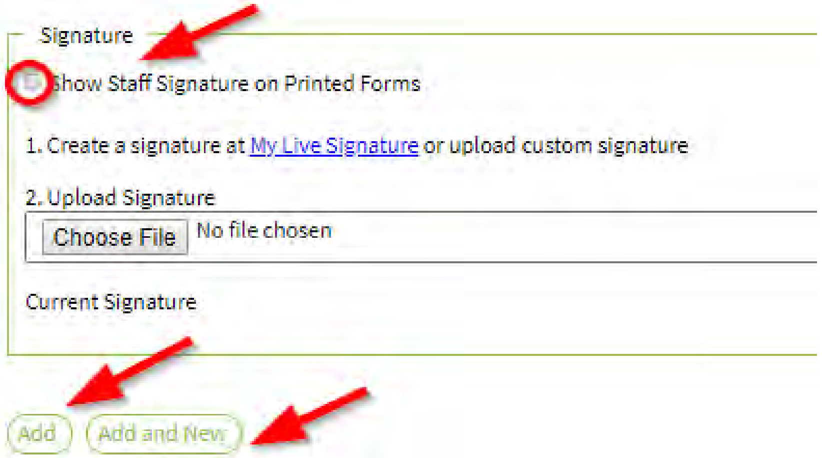
Note: *If you check the box “**Show Staff Signature on printed forms**”, the signature will be applied to all forms*

9. Once the staff info is filled,

- Click the “**Add**” button (if you are entering a single staff)

  or

- Click “**Add and New**” button (if you are entering multiple staff) and the new screen will be displayed to enter the next staff



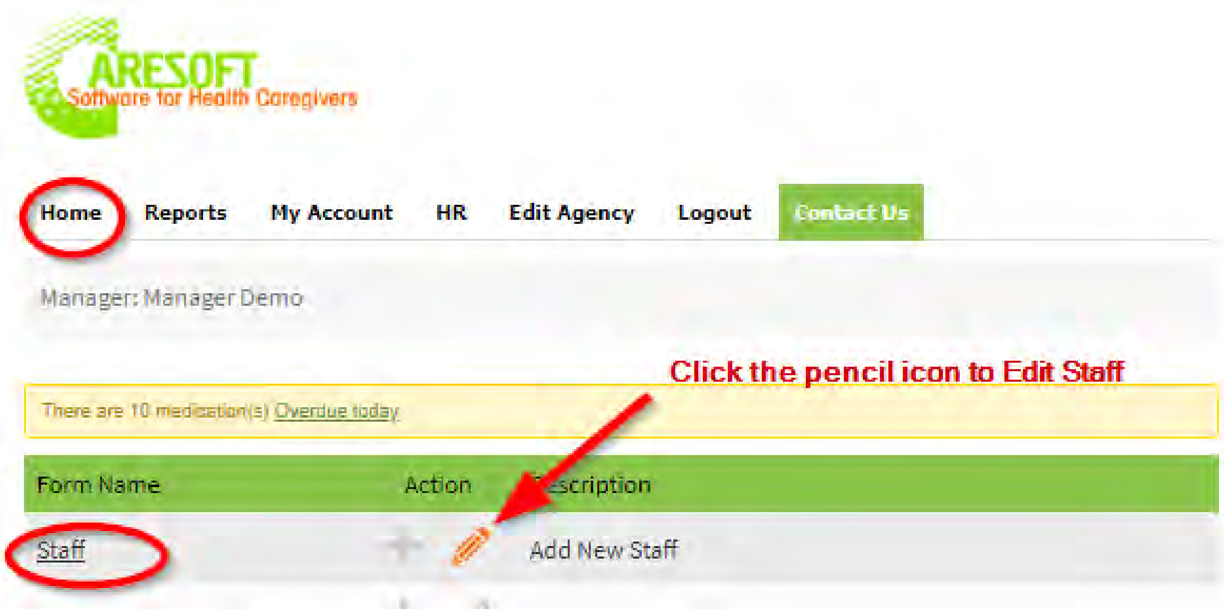
DEACTIVATE/EDIT STAFF (Employees)

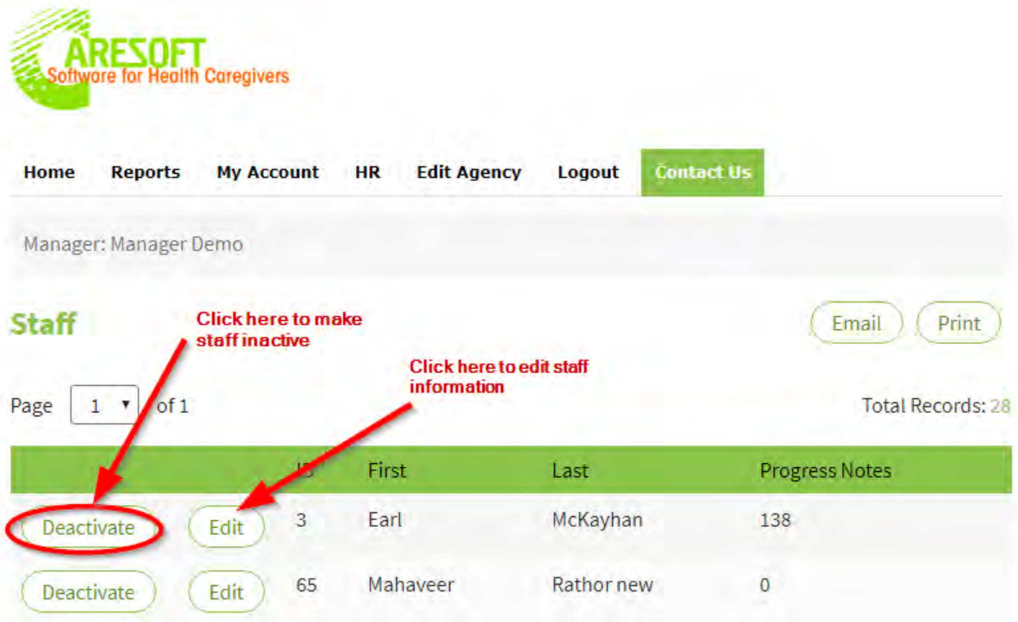
- Staff

  Use Case: This is where you deactivate or edit staff information

  <u>Process:</u>

  1. Click the "**Home**" Tab (See pic)
  2. Next to the Form Name "**Staff**", Click icon
  3. In the staff screen you can click "**Deactivate**" button if you want to make a staff inactive
  4. You can click "**Edit**" button if you want to edit staff information including a signature





EDIT MY ACCOUNT

- My Account

  Use Case: This allows all users to edit their own account information (including passwords)

  <u>Process:</u>

  1. Click the “**My Account**” Tab (See pic)
  2. Update any information that you want to update including a user name, password and signature

3. Click “**Submit** ” button at the very bottom of the page of the My Account page once all the info fields that needed to be updated are completed

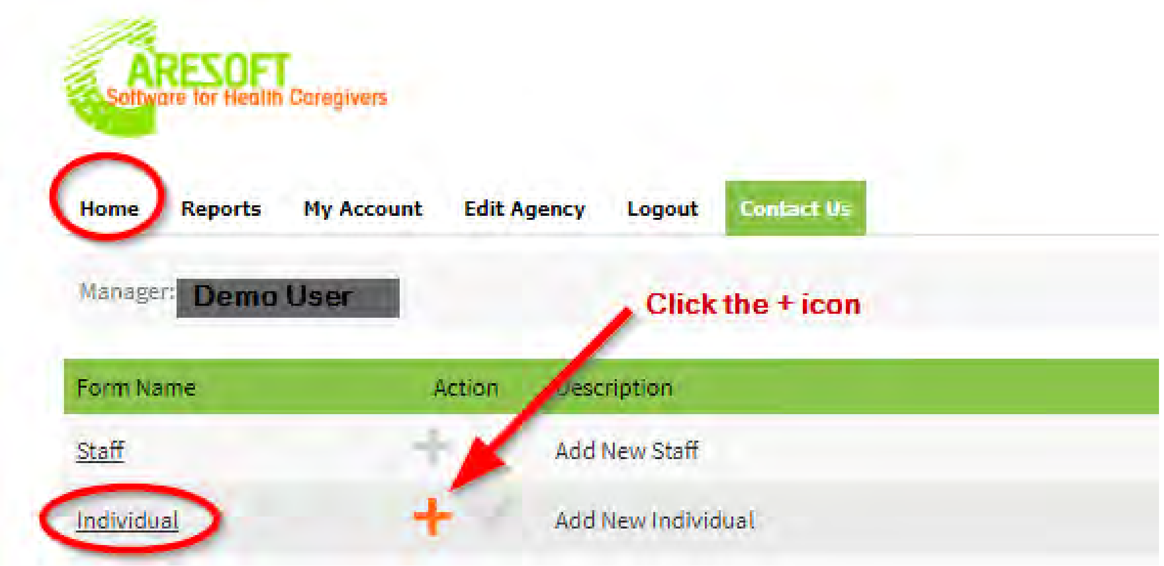
ADD INDIVIDUALS/CLIENT/PATIENTS

- Individuals/Client/Patients

  Use Case: This is where you add New Individuals (sometimes referred to as Clients or Patients)

  <u>Process:</u>

  1. Click the “Home” Tab (See pic)
  2. Next to the Form Name “Individual”, Click “**+**” icon



Software for Health Caregivers

ADD INDIVIDUALS/Clients/PATIENTS

3. The Individual or Client Entry Form will be displayed. Enter the Individual or Client information in all info fields
4. Under the “**Assign Client to Staff**” field (See pic), you will need to choose which staff to assign to the individual by checking the “**checkbox”** next to the staff name
   - By Default the individual will be assigned to all staff. You can un-assign the staff by unchecking the checkbox
5. Once the individual info is filled, Click the “**Add**” button (if you are entering a single individual)
6. If you have additional individuals to enter, click “**Add and New**” button to enter the next individual

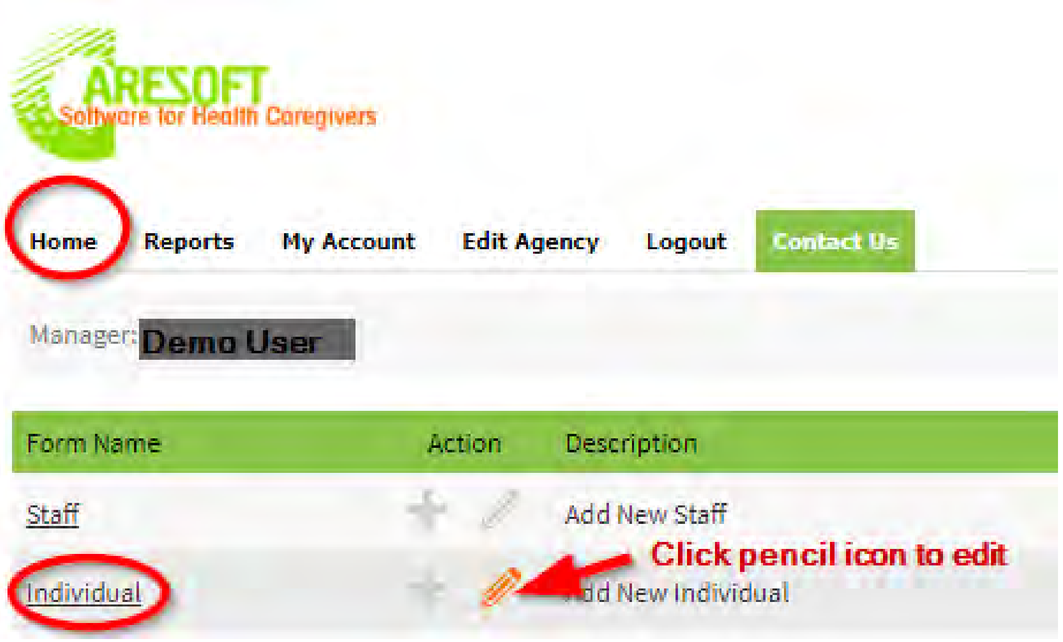
DEACTIVATE OR EDIT INDIVIDUALS/Clients/PATIENTS

- Individual/Clients/Patients

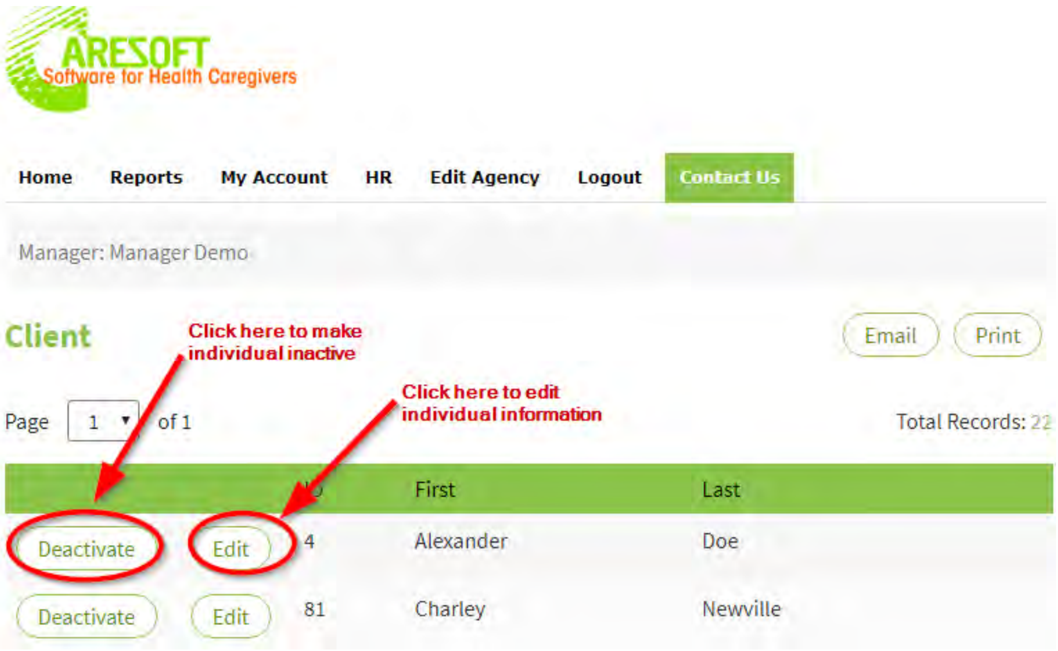
  Use Case: This is where you deactivate or edit Individuals/Clients/Patients

  <u>Process:</u>

  1. Click the “**Home**” Tab (See pic)
  2. Next to the Form Name “**Individual**”, Click icon



3. In the staff screen you can click “**Deactivate**” button if you want to make a individual inactive
4. You can click the “**Edit**” button if you want to edit the individual's information



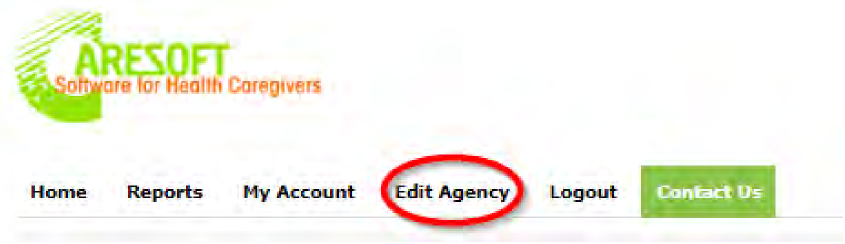
EDIT AGENCY

- Edit Agency – Admin Only

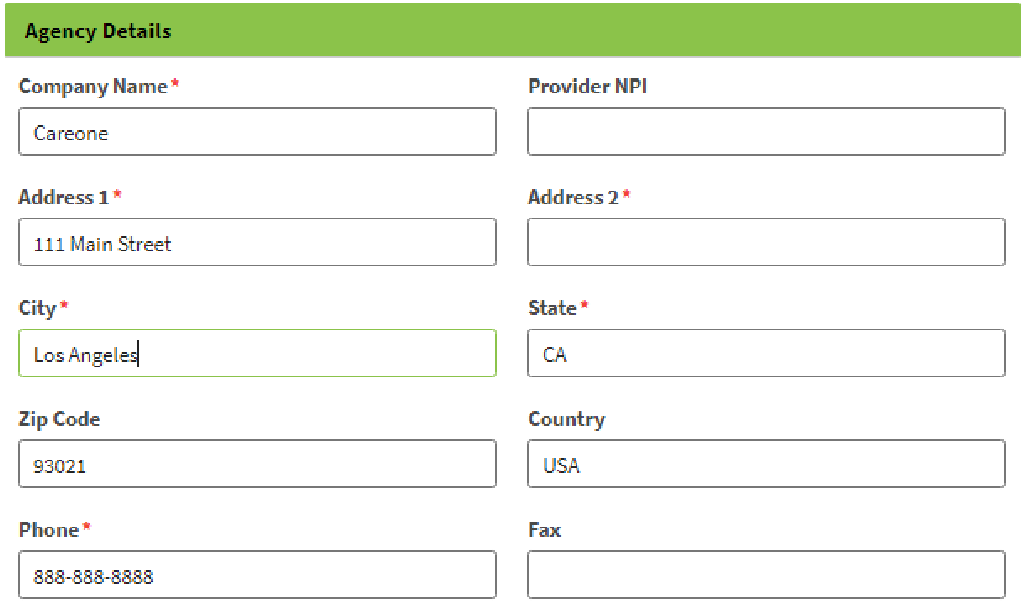
  Use Case: This is where you set up the information for your agency and labels/info fields that will be used in the forms and reports

  <u>Process:</u>

  1. Click the “**EDIT AGENCY**” Tab (See pic)



2. The Top section (info fields 1-10) is basic information about the agency. Make sure you have the most updated information in these fields

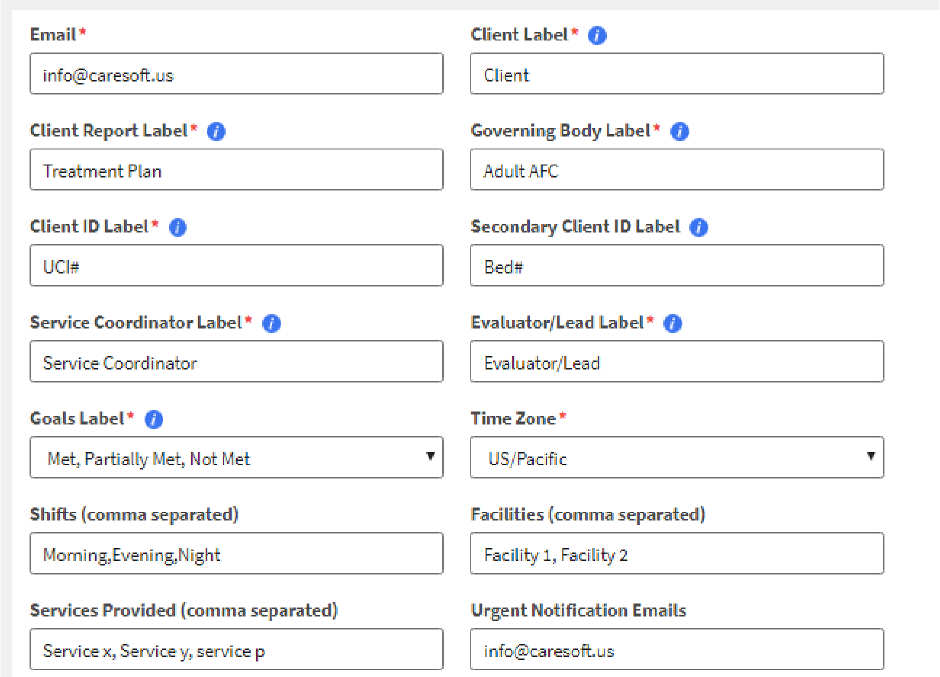

Agency Details

Company Name *	Careone	Provider NPI	
Address 1 *	111 Main Street	Address 2 *	
City *	Los Angeles	State *	CA
Zip Code	93021	Country	USA
Phone *	888-888-8888	Fax	

EDIT AGENCY

3.The Middle section (info fields 11-24) allows you to label info fields that controls how your forms and reports would function and display

- **Email:** Enter the email that will be used for all communication to your agency
- **Client Label: W**hat to call the individual under your supervision Ex: *Client, Participant, Patient, Resident, Individual etc.*
- **Client Report Label**: Type what to call your individual report Ex: Treatment Plan, Individual Service Plan, Individual Program Plan etc.
- **Government Body Label**: Type what to call your government body Ex: Regional Center, State Agency, Adult AFC etc.
- **Client ID Label**: Type what to call your individual ID Ex: UCI#, ID# etc.
- **Secondary Client ID Label**: Type what to call your individual Secondary ID (If applicable) Ex: Bed#, Room# etc.
- **Service Coordinator Label**: type what to call your Service Coordinator Ex: Service Coordinator, Case Manager etc.



EDIT AGENCY

- **Evaluator/Lead Label:** : Enter what to call your evaluator Ex: Evaluator/Led, Evaluator etc.
- **Goals Label** : Choose the type of goals evaluation structure you want to use. In a drop down menu there are two options (See pic)

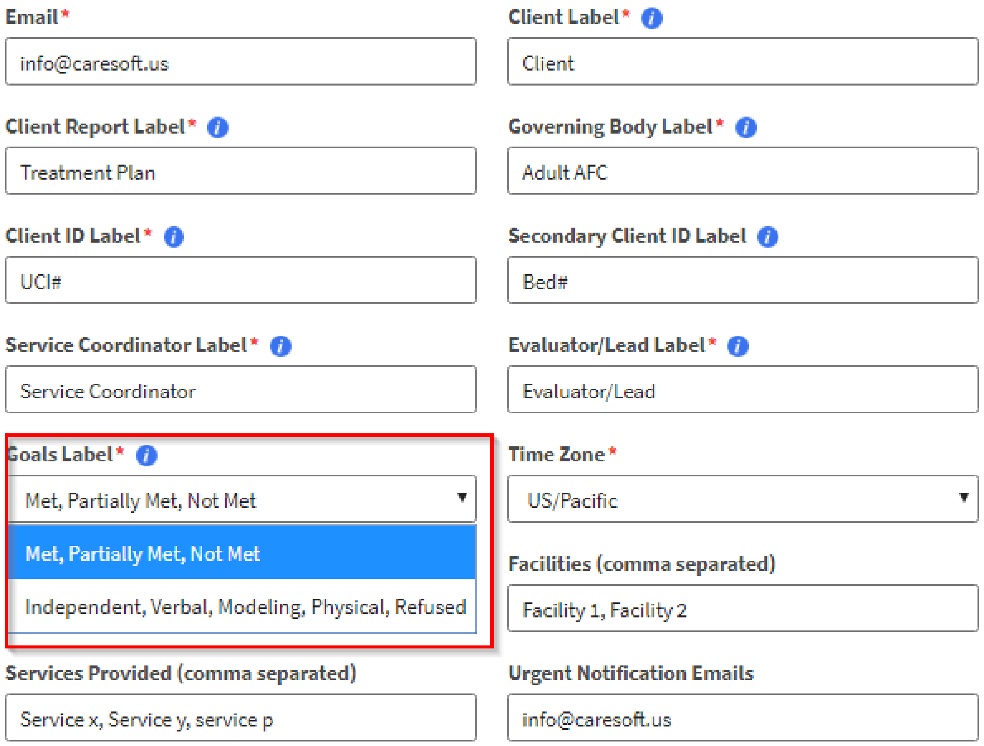
  I. Met, Partially Met, Not Met *(This is option is used for specific goals set for the individual, 99% of agencies use this option)*

  Ex: John will spend the 6 hours without attempting to AWOL.
  __Yes (met goal) __No(not met goal) ___Partially __N/A

  II. Independent, Verbal, Modeling, Physical, Refused *(This is option is used for the general goal set for the individual)*

  Ex: Goal Met? __Independent __Verbal ___Modeling
  __Physical __Refused __N/A

- **Time Zone**: In the drop down menu, Choose the time zone of the location of your agency



EDIT AGENCY

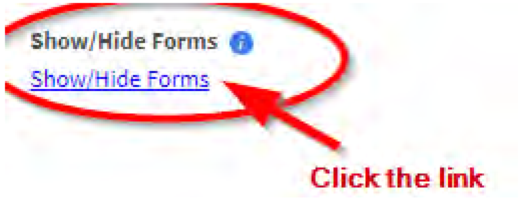
- **Shifts**: Type the shifts you use Ex: Morning, Evening, Night or AM, PM, NOC . Use comma to separate them
- **Facilities**: Type the facilities you have Ex: Facility 1, Facility 2, Facility 3 etc. Use comma to separate them
- **Services Provided:** Type what services you provide Ex: Service X, Service Y etc. Use comma to separate them
- **Urgent Notification Emails:** Type the email address(s) of the person (s) that you want all the urgent notifications sent to by your staff. Use comma to separate the emails

EDIT AGENCY

4.The Bottom section allows you to I)Show/Hide Forms
II)Update billing info
III)Upload a logo

I. Show/Hide Forms: Allows admin to allow certain forms to be visible and fully accessible to manager and staff

- Click the link “ Show/Hide Forms” (See pic below)



- A new tab will open displaying a list of forms along with the check boxes for Manager and Staff Access (See pic below)

Form Name	Manager Access	Staff Access
Activity Log	☐	☐
Behaviors	☑	☐
Body Assessment	☑	☑
Client Files	☑	☑
Clients	☑	☐
Doctors	☑	☑
Goals	☑	☑
Helpful Interventions	☑	☑
Important Dates	☑	☑
Incident Report	☑	☑
MAR Worksheet	☑	☑
Medication Log	☑	☑
Medications	☑	☑
Personal and Incidentals	☑	☑
Personal and Incidentals Log	☑	☑
Progress Notes/Activity/Billing Log	☑	☑
Quality of Living Tasks	☑	☑
Shift Summary	☐	☐
Staff	☑	☐
Student Intake	☐	☐
Vital Signs and Weight	☑	☑

Submit Form

EDIT AGENCY

- By Default forms shown to managers are automatically shown to staff. It is up to the admin to decide which forms to give access to managers and/or staff
- Admin will give access to all the forms by checking the check boxes then click “**Submit Form**” button at the bottom. (Admin can uncheck the box to remove access before clicking “**Submit Form**” button)
- Admin will then close a tab and go back to the previous “**Edit**

Agency” Tab to continue updating billing info and upload logo

EDIT AGENCY

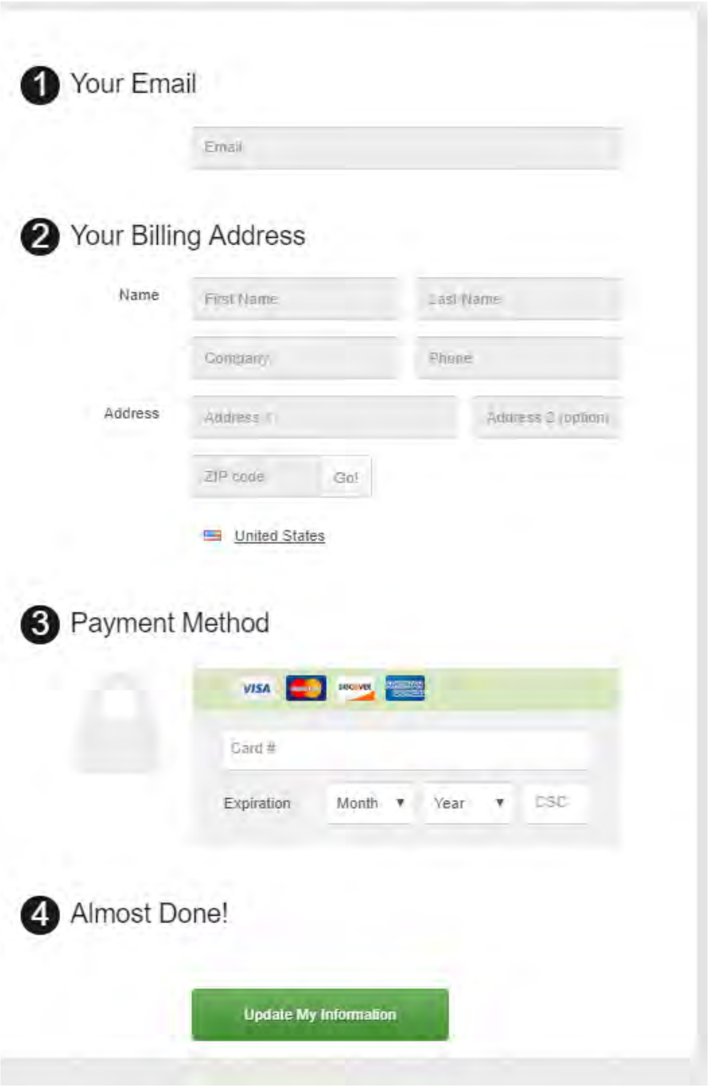
II. Update Billing Info: Allows you to Edit Update billing info

- Click the link

Update Billing Information
If you would like to update your payment card for future transactions, please use the link to enter your updated billing information:
https://caresoft.foxycart.com/cart?cart=updateinfo

- In the billing page you can edit the billing info and click "**Update My Information**" button. Make sure you use the email address that is already in the system

  Note: *Click the navigation back button, If you want to go back to previous screen to continue editing agency info*



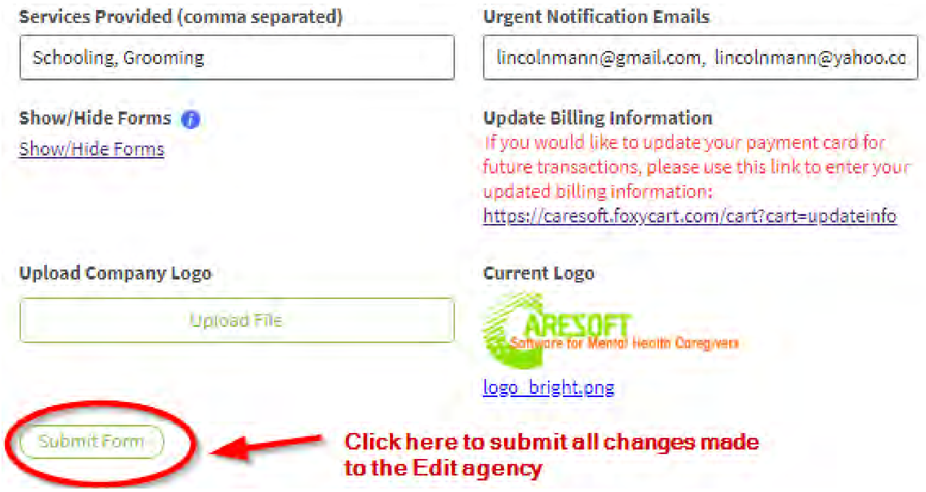
EDIT AGENCY

III. Upload Company logo: This is where you can upload your agency logo so that it can be incorporated in the reports

- Click the “**Upload File**”
- Grab the logo from where you saved it and upload it
- The logo will be saved in the “**Current Logo**” section and will appear in the reports

5. Click “**Submit Form**” button at the very bottom of the page of the Edit Agency page once

- All the info fields (1-24) are completed
- Custom Progress Note Type is added(if applicable)
- Billing info is updated
- Company logo is uploaded



CONTACT US

- Contact Us

  Use Case: This is the form you use to send any inquiries to the Customer Service Department.

  Process:

  - Click the "**Contact Us**" Tab (See pic)
  - Type your email address and phone number in the appropriate sections
  - Type your inquiry in the "**Message**" section
  - Click the "**Submit Form**" button
  - The Customer Service Team will receive an email and will respond to your inquiry via email or call
  - You can also call us directly at (479) 439 4982 or email us at info@caresoft.us