



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

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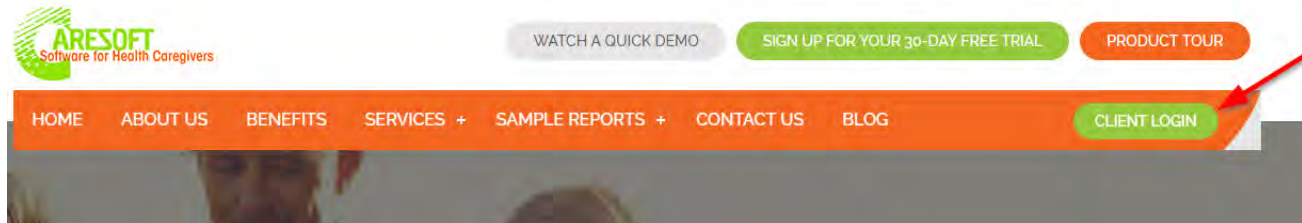
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## GETTING STARTED

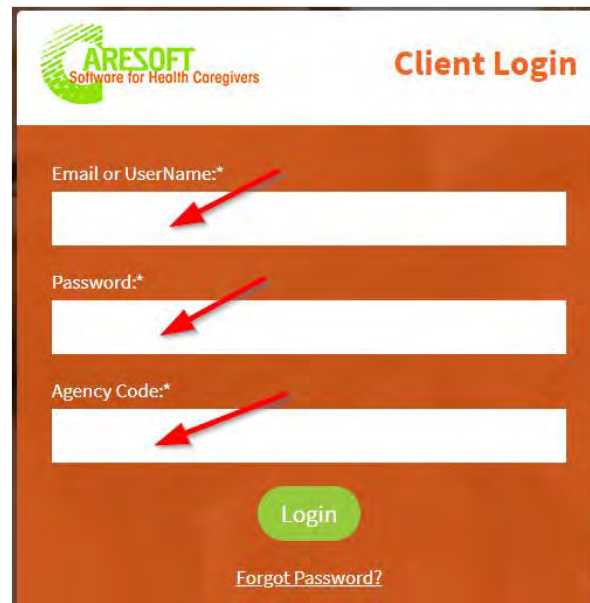
	<b>Slide#</b>
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# LOG IN

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



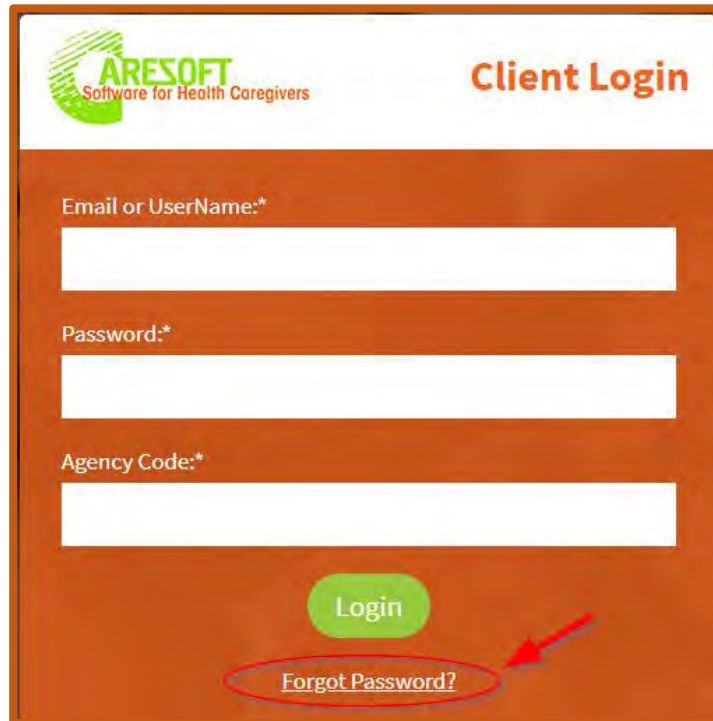
3. Enter Email/User Name, Password & Agency Code, then click “Login” button



The screenshot shows the 'Client Login' form. It features three input fields: 'Email or UserName:\*', 'Password:\*', and 'Agency Code:\*'. Each input field has a red arrow pointing to it. Below the input fields is a green 'Login' button. At the bottom of the form, there is a link for 'Forgot Password?'.

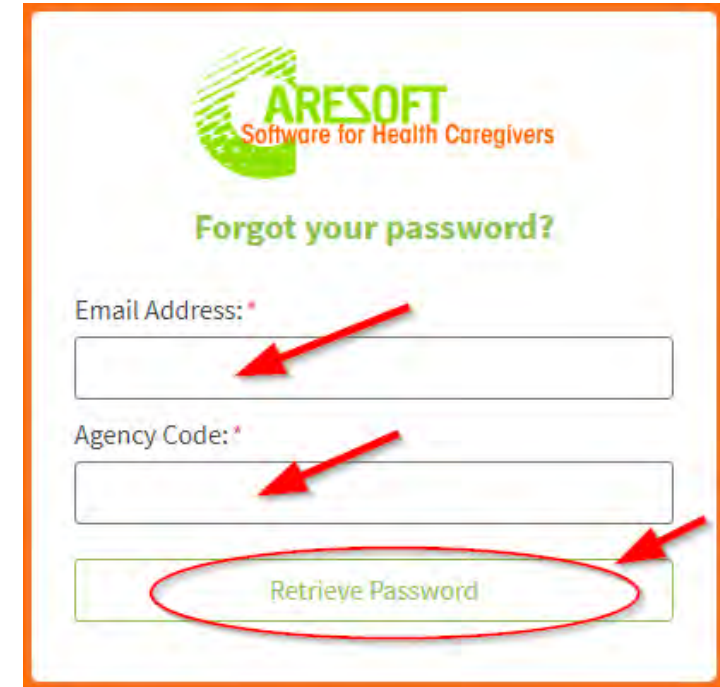
# RESET PASSWORD

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



The screenshot shows the 'Client Login' page. At the top left is the ARESOF logo. The page title is 'Client Login'. There are three input fields: 'Email or UserName:\*', 'Password:\*', and 'Agency Code:\*'. Below these fields is a green 'Login' button. At the bottom of the page, there is a red oval around the 'Forgot Password?' link, with a red arrow pointing to it.

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



The screenshot shows the 'Forgot your password?' page. At the top left is the ARESOF logo. The page title is 'Forgot your password?'. There are two input fields: 'Email Address:\*' and 'Agency Code:\*'. Below these fields is a green 'Retrieve Password' button. Red arrows point to each of the input fields and the 'Retrieve Password' button, which is also circled in red.

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

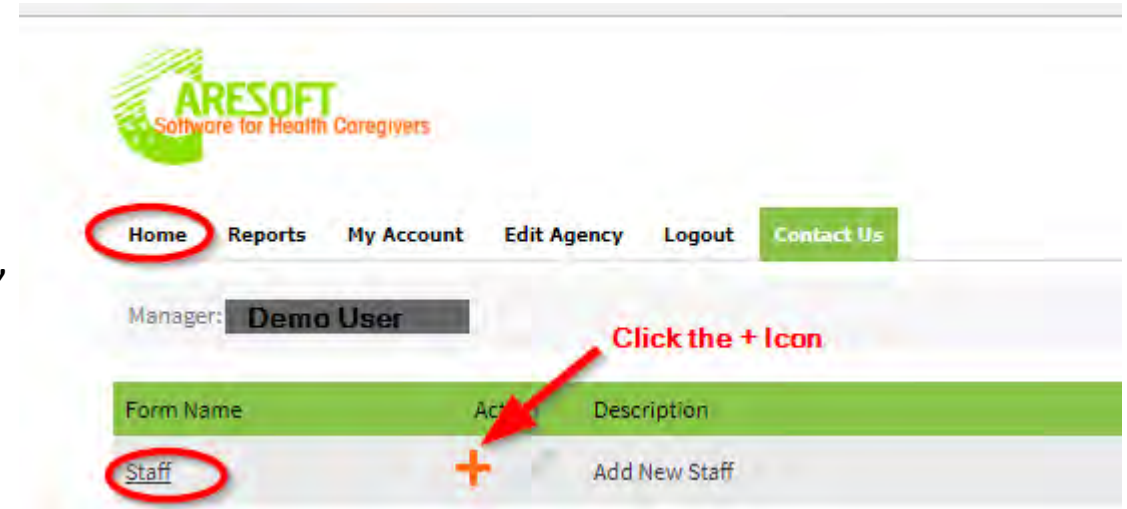
## ADD STAFF (Employees)

➤ Staff –

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

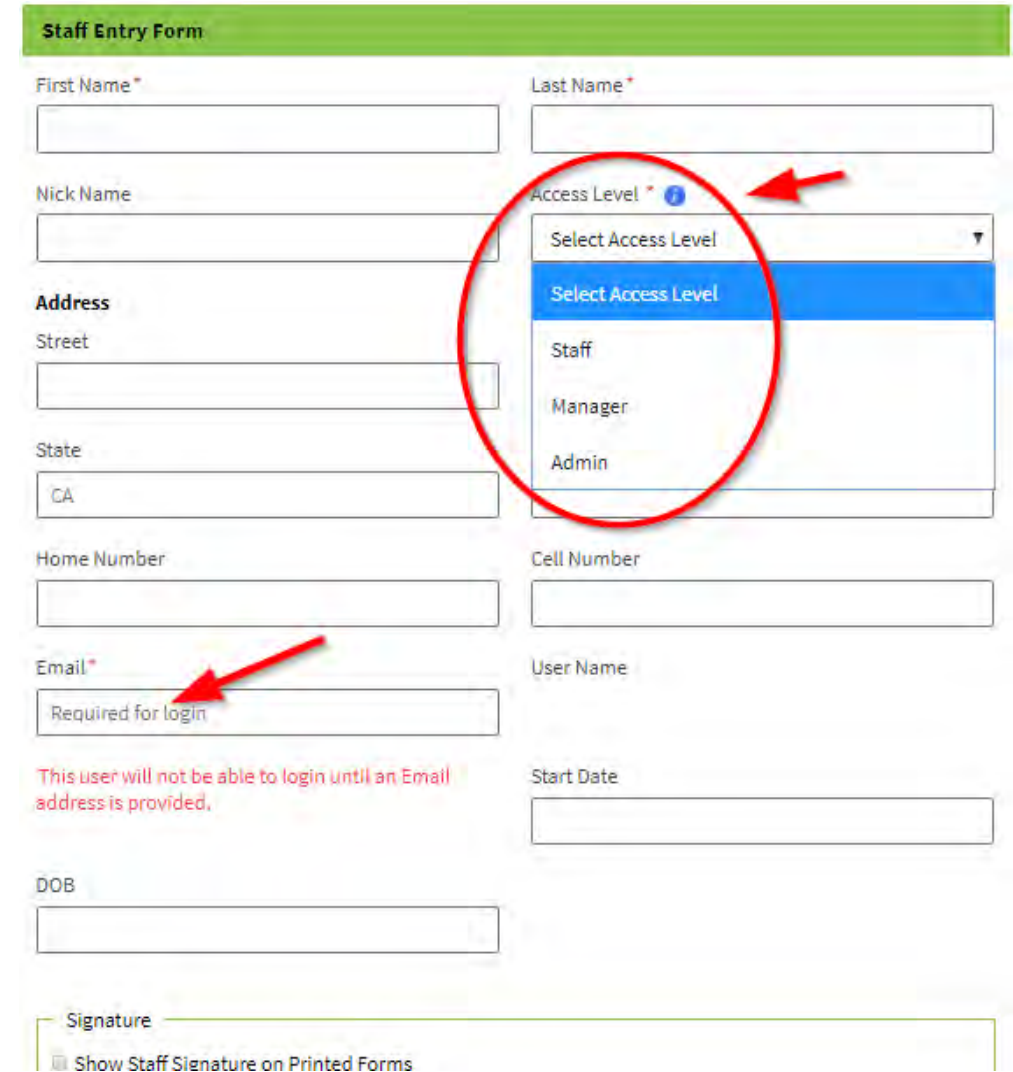
Process:

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



The screenshot shows the 'Staff Entry Form' with the following fields and annotations:

- First Name \*** and **Last Name \***: Text input fields.
- Nick Name**: Text input field.
- Address**: Section header for the following fields:
  - Street**: Text input field.
  - State**: Text input field with 'CA' entered.
  - Home Number**: Text input field.
  - Cell Number**: Text input field.
- Email \***: Text input field with a red arrow pointing to it and the text 'Required for login' below it. A red message below the field reads: 'This user will not be able to login until an Email address is provided.'
- User Name**: Text input field.
- Start Date**: Text input field.
- DOB**: Text input field.
- Access Level \***: A dropdown menu with a red circle around it and a red arrow pointing to it. The menu is open, showing options: 'Select Access Level', 'Staff', 'Manager', and 'Admin'. The 'Select Access Level' option is highlighted in blue.
- Signature**: A long text input field with a red line above it.
- Show Staff Signature on Printed Forms

## ADD STAFF (Employees)

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

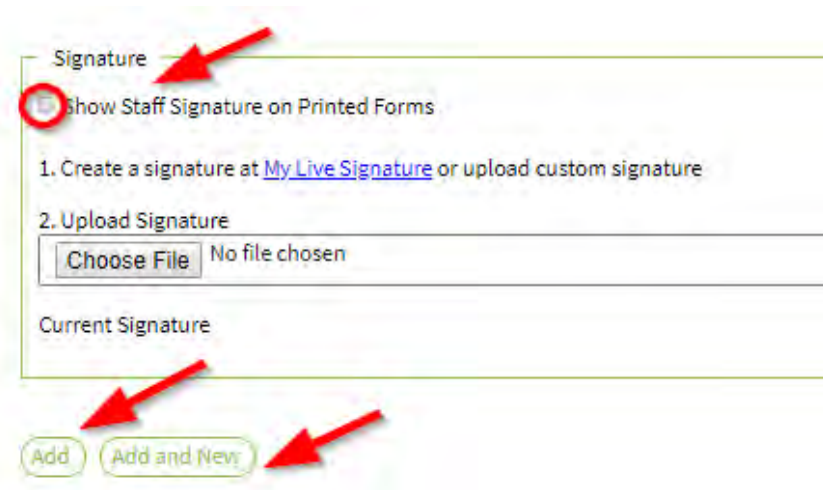
8. The “**Signature**” section (see pic) is where the staff will upload their signatures that will be used/printed in all forms/reports. Two ways to create a signature i.e.

- 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



Signature

Show Staff Signature on Printed Forms

1. Create a signature at [My Live Signature](#) or upload custom signature

2. Upload Signature

Choose File No file chosen

Current Signature


Add Add and New

# DEACTIVATE/EDIT STAFF (Employees)

## ➤ Staff

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

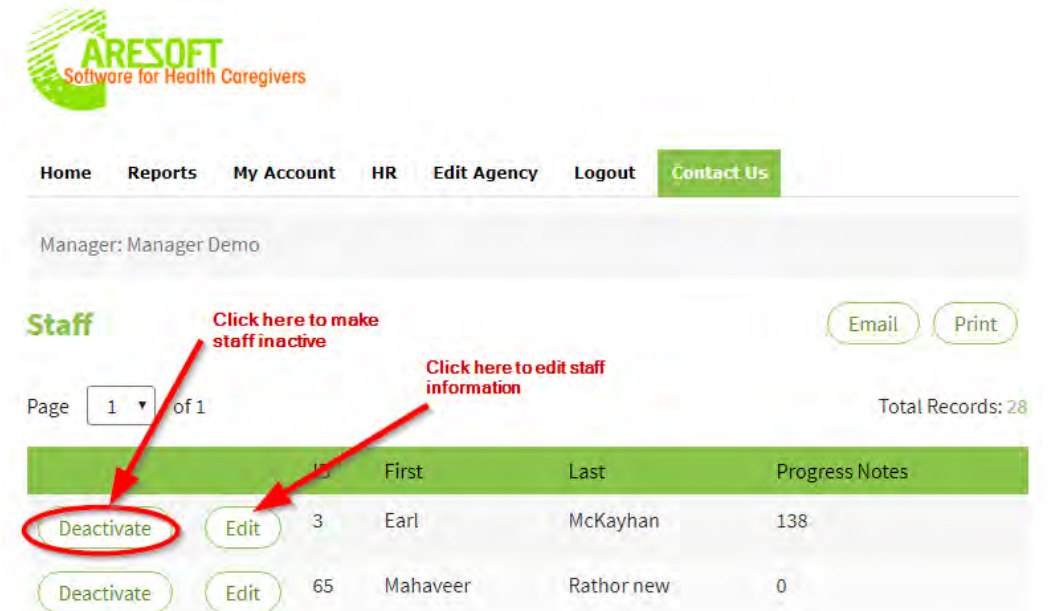
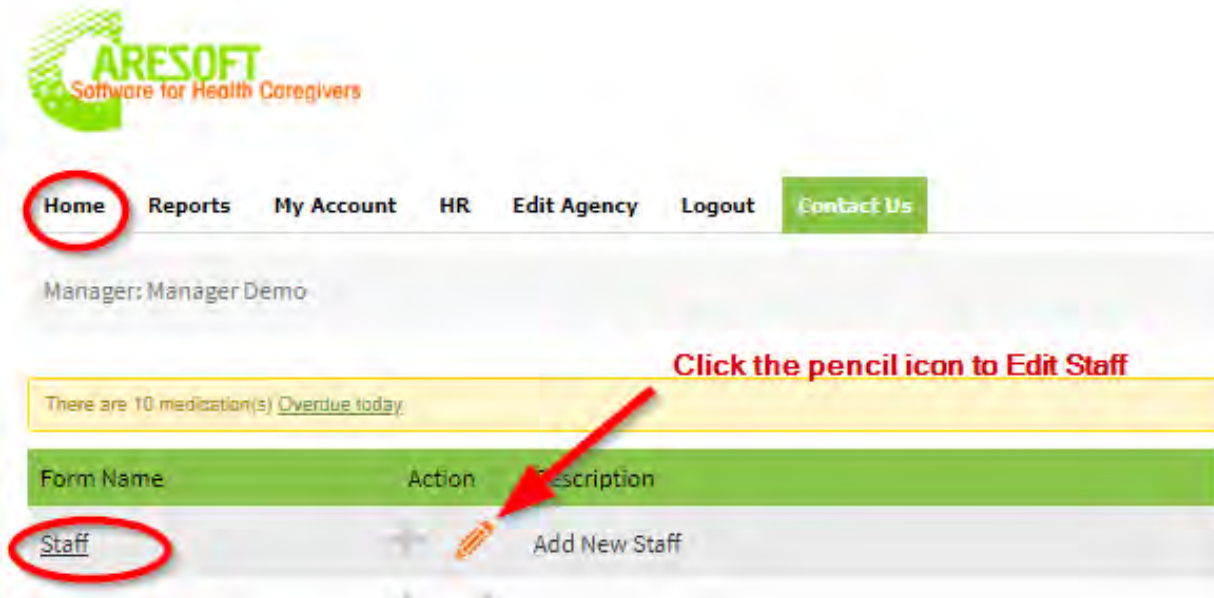
### Process:

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

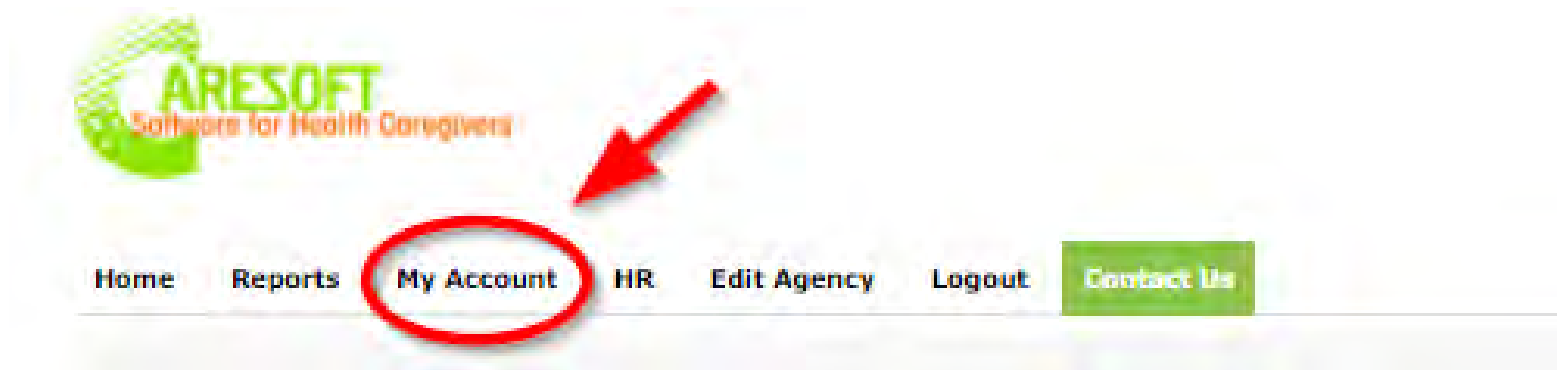
### ➤ My Account

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

#### Process:

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



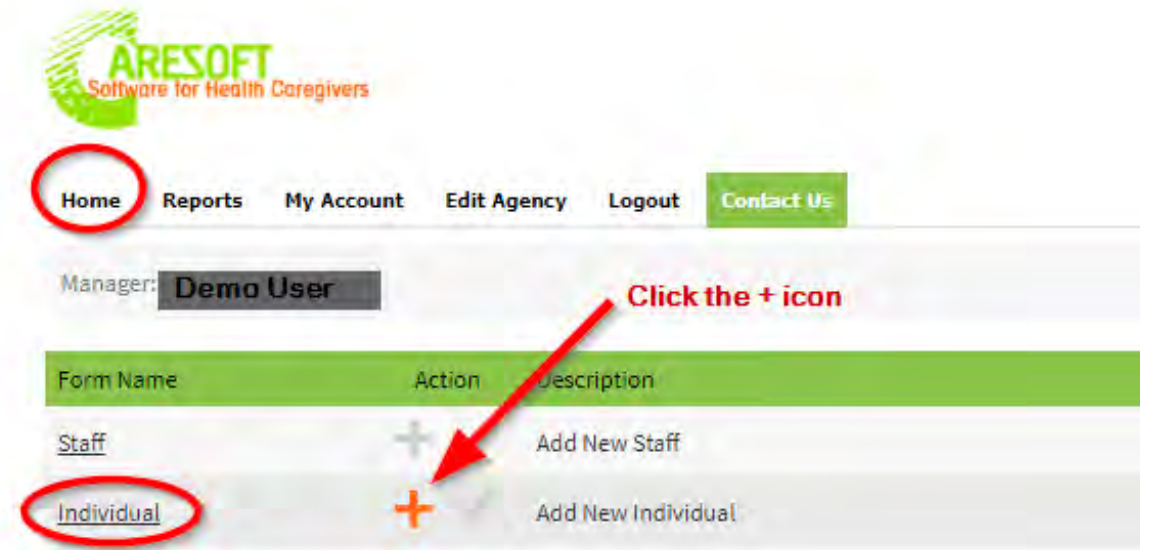
## ADD INDIVIDUALS/CLIENT/PATIENTS

### ➤ Individuals/Client/Patients

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

#### Process:

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




## ADD INDIVIDUALS/Clients/PATIENTS

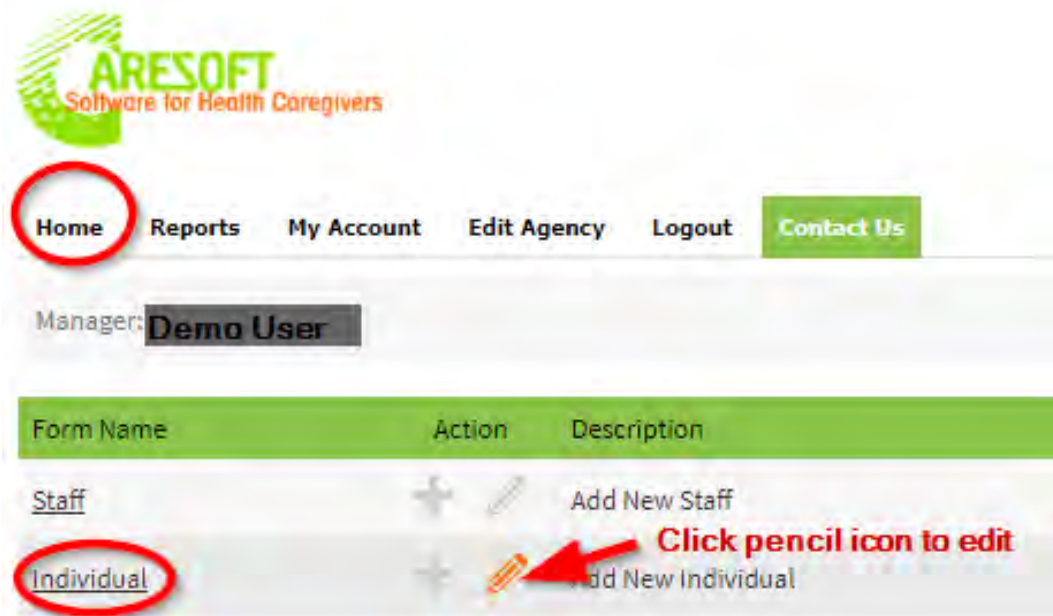
- The Individual or Client Entry Form will be displayed. Enter the Individual or Client information in all info fields
- Under the “**Assign Client to Staff**” field (See pic), you will need to choose which staff to assign to the individual by checking the “**checkbox**” next to the staff name
  - ❖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

Assign Client to Staff

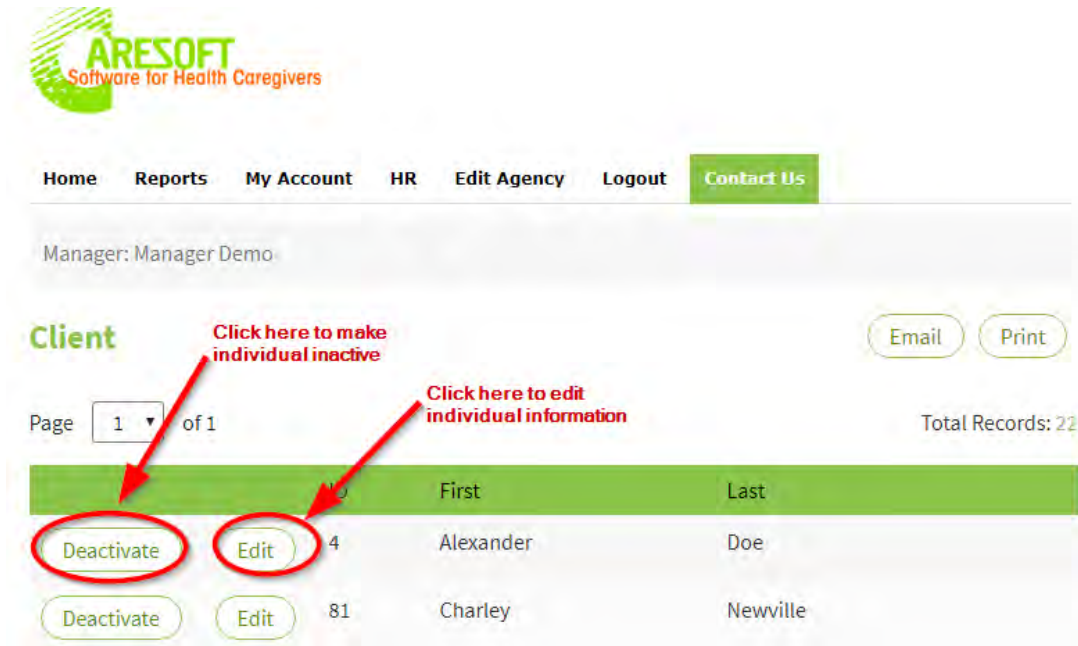
Search:	First Name	Last Name
All Staff <input checked="" type="checkbox"/>	Earl	McKayhan
<input checked="" type="checkbox"/>	Mahaveer	Rathor
<input checked="" type="checkbox"/>	Mahaveer	Rathor new
<input checked="" type="checkbox"/>	Ravi	test
<input checked="" type="checkbox"/>	test	user2

# DEACTIVATE OR EDIT INDIVIDUALS/Clients/PATIENTS

- Individual/Clients/Patients  
 Use Case: This is where you deactivate or edit Individuals/Clients/Patients  
Process:
  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  
Process:
  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 *	Provider NPI
Careone	
Address 1 *	Address 2 *
111 Main Street	
City *	State *
Los Angeles	CA
Zip Code	Country
93021	USA
Phone *	Fax
888-888-8888	



# 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:** What 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.

The screenshot shows a form with the following fields:

<b>Email *</b> info@caresoft.us	<b>Client Label * i</b> Client
<b>Client Report Label * i</b> Treatment Plan	<b>Governing Body Label * i</b> Adult AFC
<b>Client ID Label * i</b> UCI#	<b>Secondary Client ID Label i</b> Bed#
<b>Service Coordinator Label * i</b> Service Coordinator	<b>Evaluator/Lead Label * i</b> Evaluator/Lead
<b>Goals Label * i</b> Met, Partially Met, Not Met	<b>Time Zone *</b> US/Pacific
<b>Shifts (comma separated)</b> Morning,Evening,Night	<b>Facilities (comma separated)</b> Facility 1, Facility 2
<b>Services Provided (comma separated)</b> Service x, Service y, service p	<b>Urgent Notification Emails</b> info@caresoft.us

# 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)

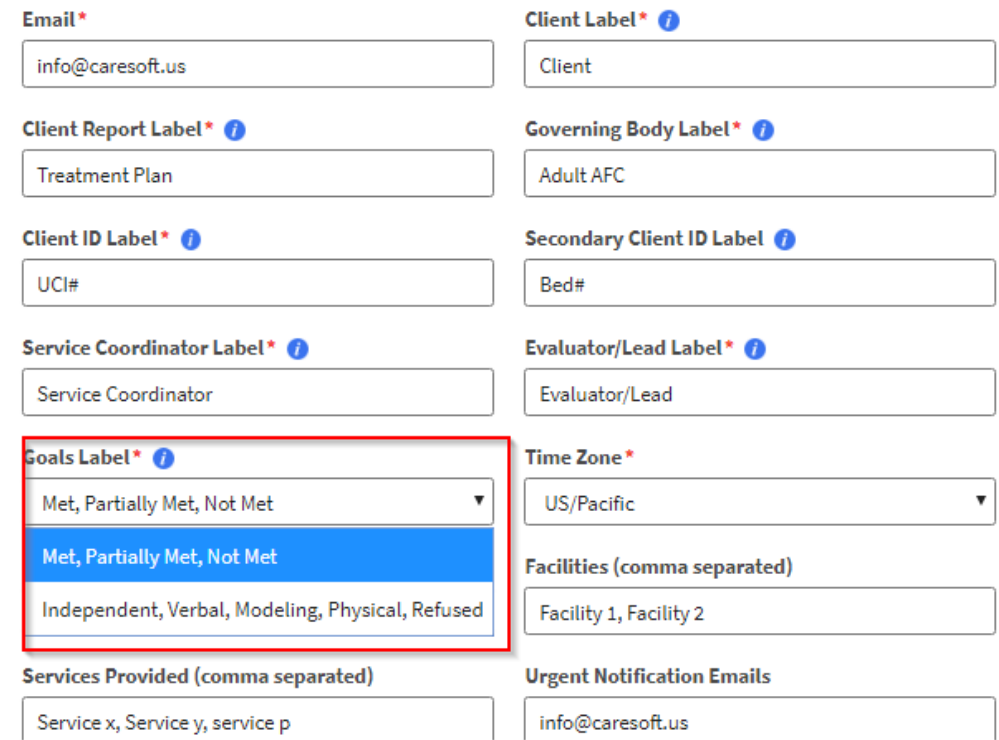
I. Met, Partially Met, Not Met *(This is option is used for specific goals set for the individual, 99% of agencies use this option)*

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



The screenshot shows a form with the following fields:

- Email \***: info@caresoft.us
- Client Label \* i**: Client
- Client Report Label \* i**: Treatment Plan
- Governing Body Label \* i**: Adult AFC
- Client ID Label \* i**: UCI#
- Secondary Client ID Label i**: Bed#
- Service Coordinator Label \* i**: Service Coordinator
- Evaluator/Lead Label \* i**: Evaluator/Lead
- Goals Label \* i**: A dropdown menu with three options: "Met, Partially Met, Not Met" (highlighted in blue), "Met, Partially Met, Not Met", and "Independent, Verbal, Modeling, Physical, Refused". The entire dropdown is enclosed in a red box.
- Time Zone \***: US/Pacific
- Facilities (comma separated)**: Facility 1, Facility 2
- Services Provided (comma separated)**: Service x, Service y, service p
- Urgent Notification Emails**: info@caresoft.us

## 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

Shifts (comma separated)

Facilities (comma separated)

Services Provided (comma separated)

Urgent Notification 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
<a href="#">Activity Log</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Behaviors</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Body Assessment</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Client Files</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Clients</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Doctors</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Goals</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Helpful Interventions</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Important Dates</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Incident Report</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">MAR Worksheet</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Medication Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Medications</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Personal and Incidentals</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Personal and Incidentals Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Progress Notes/Activity/Billing Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Quality of Living Tasks</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Shift Summary</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Staff</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Student Intake</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Vital Signs and Weight</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Submit Form](#)

# EDIT AGENCY

info and upload logo

- 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

Forms shown to Managers are automatically shown to staff

Form Name	Manager Access	Staff Access
<a href="#">Activity Log</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Behaviors</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Body Assessment</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Client Files</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Clients</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Doctors</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Goals</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Helpful Interventions</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Important Dates</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Incident Report</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">MAR Worksheet</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Medication Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Medications</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Personal and Incidentals</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Personal and Incidentals Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Progress Notes/Activity/Billing Log</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Quality of Living Tasks</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Shift Summary</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Staff</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Student Intake</a>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Vital Signs and Weight</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Submit Form  Click here to save changes

## EDIT AGENCY

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

- Click the link

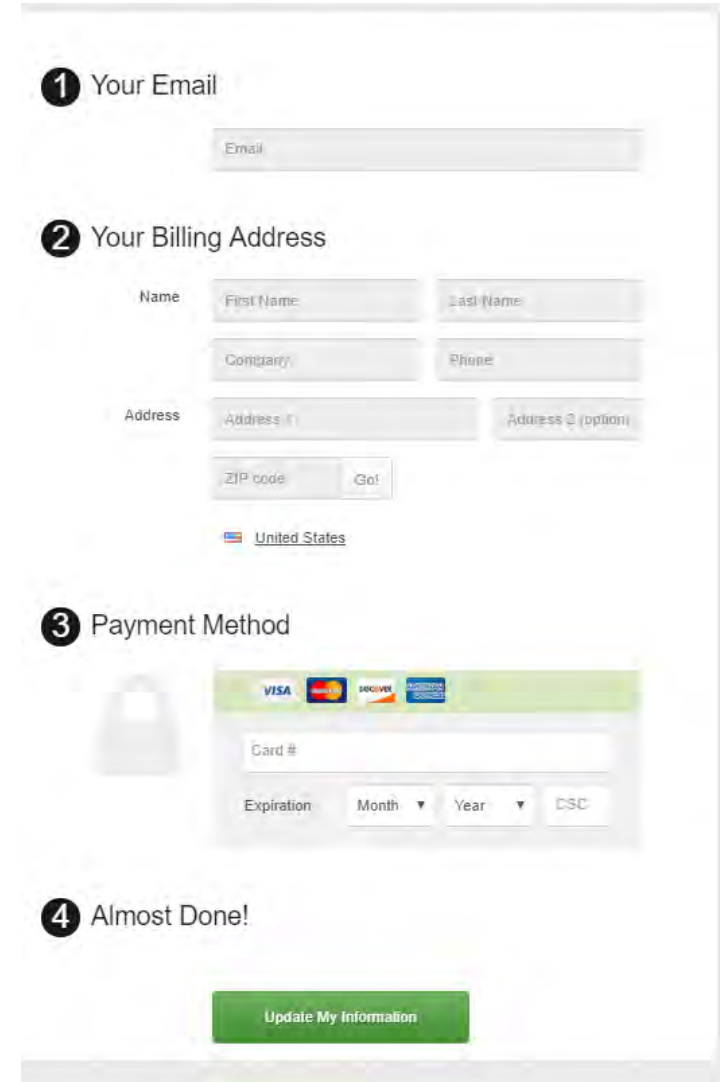
**Update Billing Information**

If you would like to update your payment card for future transactions, please use this 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*



**1 Your Email**

Email

**2 Your Billing Address**

Name: First Name, Last Name

Country, Phone

Address: Address 1, Address 2 (optional)

ZIP code, Go!

United States

**3 Payment Method**

VISA, MasterCard, Discover, American Express

Card #

Expiration: Month, Year, CSC

**4 Almost Done!**

Update My Information

## EDIT AGENCY

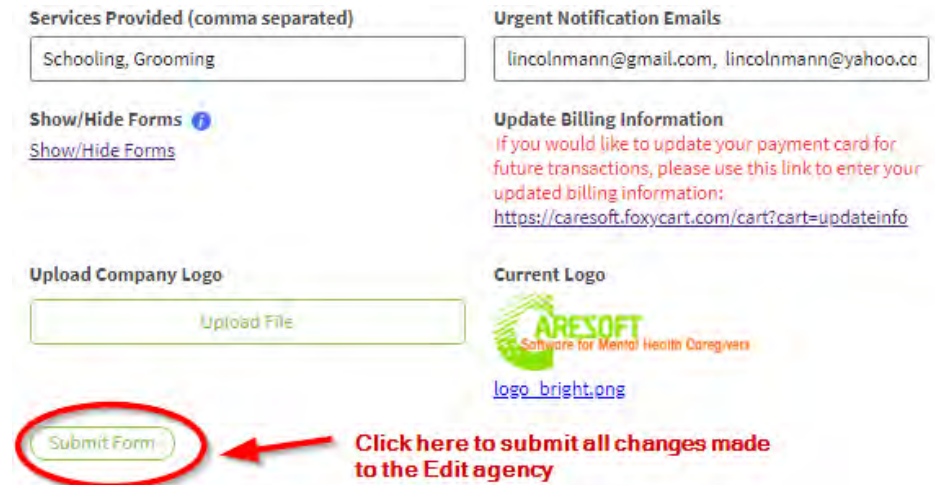
**III. Upload Company logo:** This is where you can upload your agency logo so that it can be incorporated in the reports

- 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

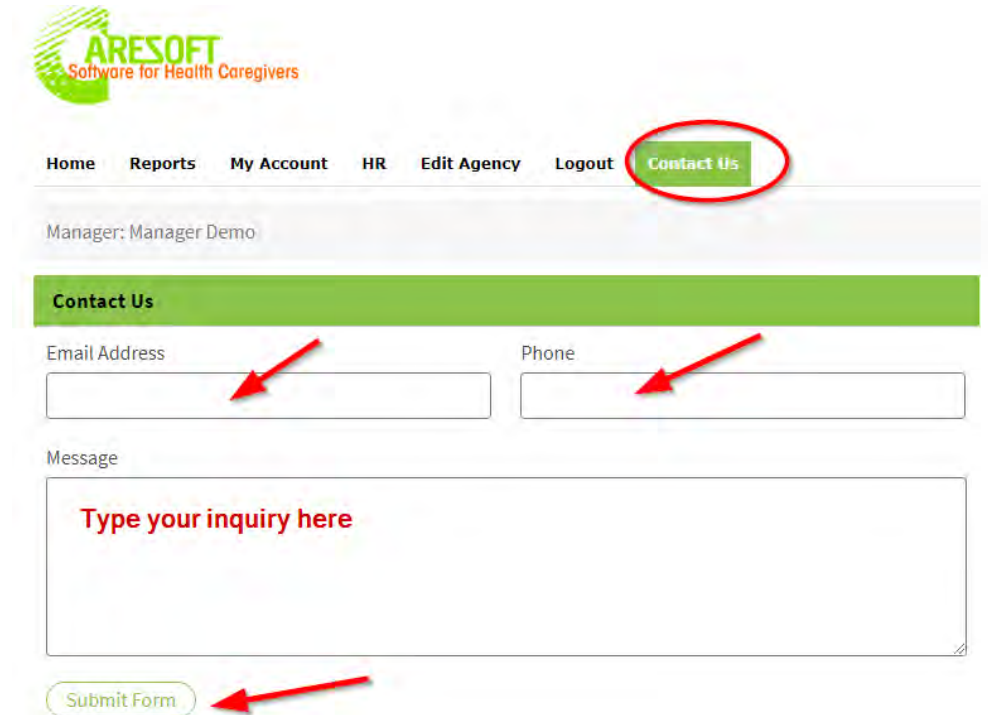


## ➤ Contact Us

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



The screenshot shows the ARESOF web interface. At the top left is the ARESOF logo. A navigation menu includes Home, Reports, My Account, HR, Edit Agency, Logout, and Contact Us (circled in red). Below the menu, the user is identified as 'Manager: Manager Demo'. A green header bar contains the text 'Contact Us'. The form consists of three main sections: 'Email Address' and 'Phone' (each with a text input field and a red arrow pointing to it), and 'Message' (a large text area with the red text 'Type your inquiry here'). At the bottom of the form is a 'Submit Form' button with a red arrow pointing to it.