



HomeTrak
Your expert companions in home care software

Adding Someone New to HomeTrak Companion

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HomeTrak Terms of Reference

Below you will find some common terms used throughout HomeTrak Companion and what they mean.

Call Types (Services) are items that you pay or bill for. Example: *Homemaker, Personal Care*

Authorizations tell the software who is paying the bill, and for what service they are paying for.

Required Dates are also known as Certification Dates and are used for tracking items required for clients and caregivers. i.e. Professional License (Caregiver), Quarterly Reassessment Visits (Client)

Documented Events are any type of event you need to record and report on and can play 2 roles:

1. Documenting significant events (good or bad) involving clients and/or caregivers
2. Used as a marketing tool to document the minutes of a meeting or conversation with referral sources.

Adding a New Office Staff Person

What Information do I need to add in a new Office Staff person?

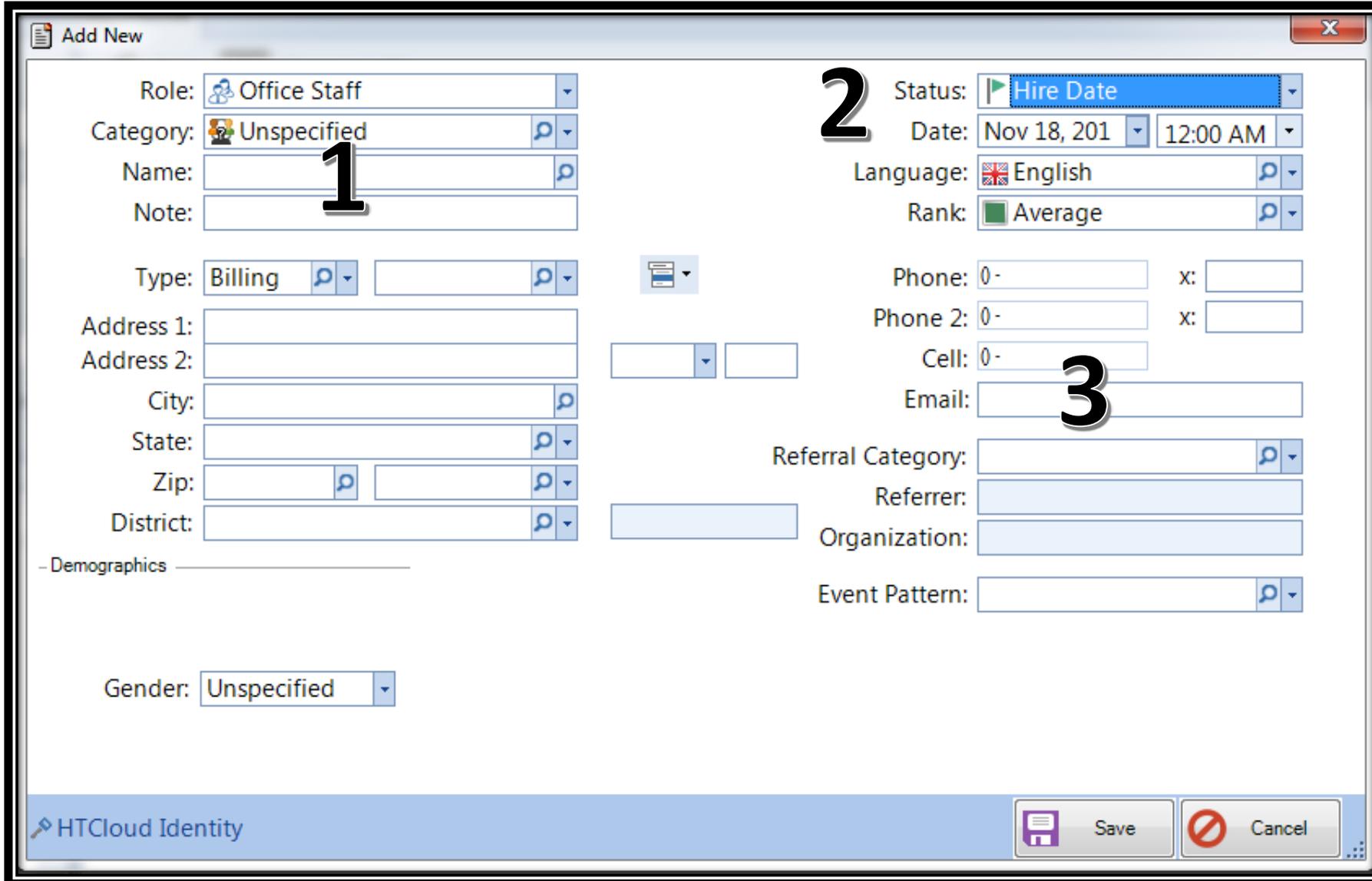
Setup completed in Relationship Management Module – Office Staff tab – Click



1. First & Last Name
2. 'Hire Date' Status and Status Date (First Day of Employment)
3. Email Address (required for logging into HomeTrak Desktop Version, Mobile App and HomeTrak Online web page)

Upon typing in the above information, you will click SAVE to create the profile. The 'Manage Users Account (Identity)' screen will then open.

Adding a New Office Staff Person (Continued)



1

2

3

Role: Office Staff
Category: Unspecified
Name:
Note:
Type: Billing
Address 1:
Address 2:
City:
State:
Zip:
District:
- Demographics
Gender: Unspecified

Status: Hire Date
Date: Nov 18, 201 12:00 AM
Language: English
Rank: Average
Phone: 0- x:
Phone 2: 0- x:
Cell: 0-
Email:
Referral Category:
Referrer:
Organization:
Event Pattern:

HTCloud Identity

Save Cancel

OFFICE STAFF INFORMATION REQUIREMENTS

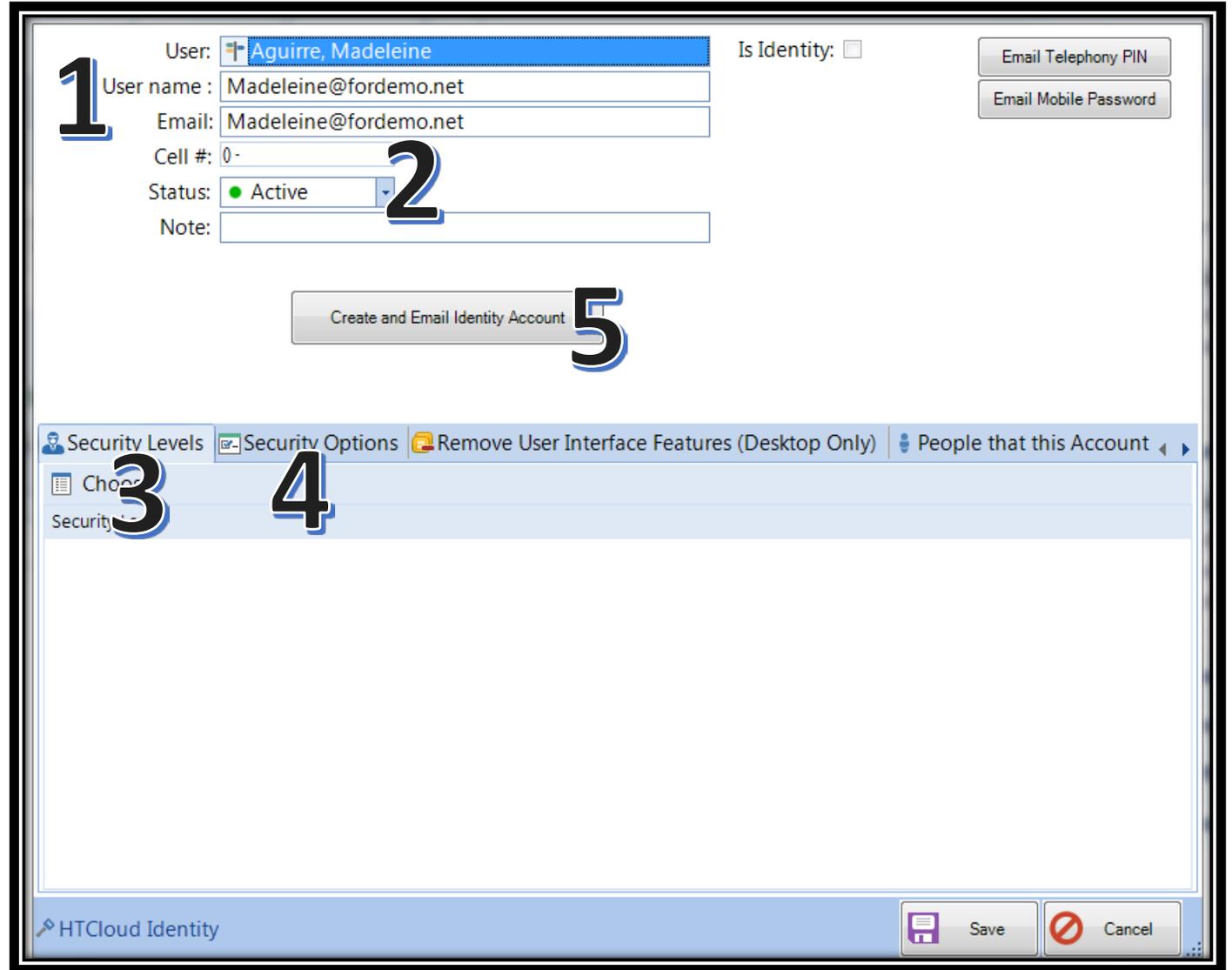
1. First & Last Name
2. Hire Date Status & Status Date
3. Email Address (for accessing HomeTrak, HomeTrak Mobile & HomeTrak Online)

Click SAVE

Manage Users Account (Identity)

What must I do to get my Office Staff set up to log into HomeTrak?

1. **User Name** and **Email** sections will prefill with Office Staff person's email address.
2. **Status MUST** be Active
3. **Security Levels** – you can choose which areas of the software this Office Staff person can access when they log in
4. **Security Options** – you can choose whether or not this person can view Birthdates and Social Security Numbers (checkmark the box to grant access)
5. **Create and Email Identity Account** – Office Staff receives email to Activate their account and create a password (7 character minimum)



The screenshot shows the 'Manage Users Account (Identity)' window for user 'Aguirre, Madeleine'. The interface includes the following elements:

- User:** Aguirre, Madeleine (highlighted with a blue bar)
- Is Identity:**
- Buttons:** 'Email Telephony PIN' and 'Email Mobile Password' (top right)
- 1** **User name:** Madeleine@fordemo.net
- Email:** Madeleine@fordemo.net
- Cell #:** 0-
- 2** **Status:** Active (dropdown menu)
- Note:** (empty text field)
- 5** **Create and Email Identity Account** (button)
- 3** **Security Levels:** (tab selected)
- 4** **Security Options:** (tab selected)
- Remove User Interface Features (Desktop Only):** (checkbox)
- People that this Account:** (dropdown menu)
- HTCloud Identity** (bottom left)
- Save** and **Cancel** (bottom right)

Activating Your Identity Account

Subject: Support Demo - HomeTrak Identity Account Confirmation

 **HomeTrak Identity**
Account Verification

Hello Seinfeld, Jerry,

You have been granted access to Support Demo. We first need to activate your new *HomeTrak Identity* account and configure a password.
[Please click here to activate your account.](#)

Company Code:
UserName:

Please remember or bookmark the following URL so you can easily access this agency in the future:
<https://SupportDemo.hometrakcloud.ca/HTPortal/>

If you have any questions, please contact the agency below.

Sincerely,

Email will come from **HOMETRAK IDENTITY**. You may have to check your junk folder if it's not showing in your inbox!

Click on the link in the email. This will bring you to a webpage to create a password for logging in!

Adding a New Client

What Information do I need in order to add in a new Client?

Setup completed in Relationship Management Module – Client tab – Click



- 1. First & Last Name**
- 2. Address**
- 3. Phone Number**
- 4. Active Status & Status Date (First Day of Service)**
- 5. Adding Relationships (Emergency Contacts, Individuals, Organizations, Manager)**
- 6. Authorization (including Billing Rate, Rate Type and Duties to Perform) [Scheduling Setup]**
- 7. Billing Options**
- 8. Care Plan (Optional)**

Adding a New Client (Continued)

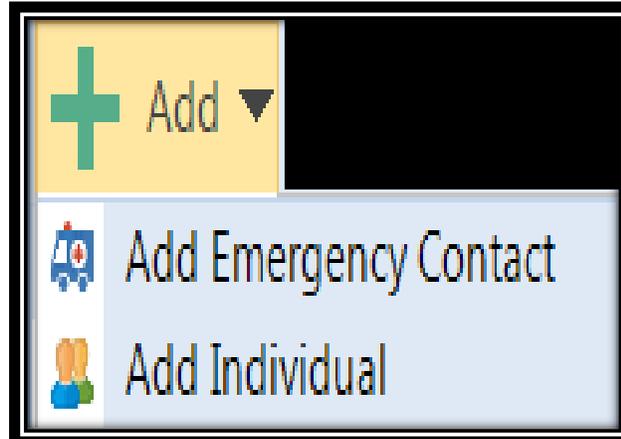
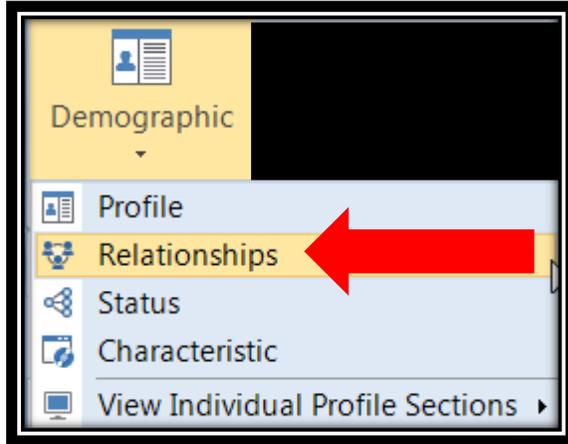
The screenshot shows a software window titled "Add New" with a close button in the top right. The form is divided into several sections. On the left, there are fields for "Role" (set to "Client"), "Category" (set to "Unspecified"), "Name", "Note", "Type" (set to "Billing"), "Address 1", "Address 2", "City", "State", "Zip", and "District". Below these is a "Demographics" section with a "Gender" field set to "Unspecified". On the right, there are fields for "Status" (set to "Active"), "Date" (set to "Nov 21, 201" and "12:00 AM"), "Language" (set to "English"), "Rank" (set to "Average"), "Phone", "Phone 2", "Cell", "Email", "Referral Category", "Referrer", "Organization", and "Event Pattern". At the bottom right, there are "Save" and "Cancel" buttons. Large numbers 1 through 5 are overlaid on the form to indicate requirements: 1 is on the "Name" field, 2 is on the "Address 1" field, 3 is on the "Status" field, 4 is on the "Phone" field, and 5 is on the "Email" field.

CLIENT INFORMATION REQUIREMENTS:

1. First & Last Name
2. Address (for GPS)
3. Active Status & Status Date
4. Phone Number
5. Email Address (if wanting access to the Mobile App)

Click SAVE

Adding a Relationship



WHAT DO I NEED WHEN ADDING IN A RELATIONSHIP TO A CLIENT?

1. First & Last Name
2. Address (required if this person will be receiving and paying the invoice).
3. Phone Number or Email Address

Slide 13 shows where to attach that person for billing purposes!

Click **SAVE**

A screenshot of the 'Add New' form in the software. The form is for adding an 'Emergency Contact'. It has several fields and dropdown menus. A large number '1' is placed over the 'Name' field. A large number '2' is placed over the 'Address 1' field. A large number '3' is placed over the 'Email' field. The form includes fields for Role, Category, Name, Note, Type, Address 1, Address 2, City, State, Zip, District, Demographics, Gender, Status, Date, Language, Rank, Phone, Phone 2, Cell, Email, and Event Pattern. There are 'Save' and 'Cancel' buttons at the bottom.

Setting Up a Client Authorization

Multi Add Authorization

Payer: Balsler, Leigh D **1**

Send Invoice To: **1**

22/11/2016 22/11/2026

<input type="checkbox"/> Add	Call Type ↓	Rate Package	Start	End	Max Hours	Per	Bill Rate
<input type="checkbox"/>	Service Place Holder		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>	PCA Hourly		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>	Homemaker Hourly		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>	CG 24 HR Live In - Breaks		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>	Caregiver 24 Hr Live In		Nov 22, 2016	Nov 22, 2026			

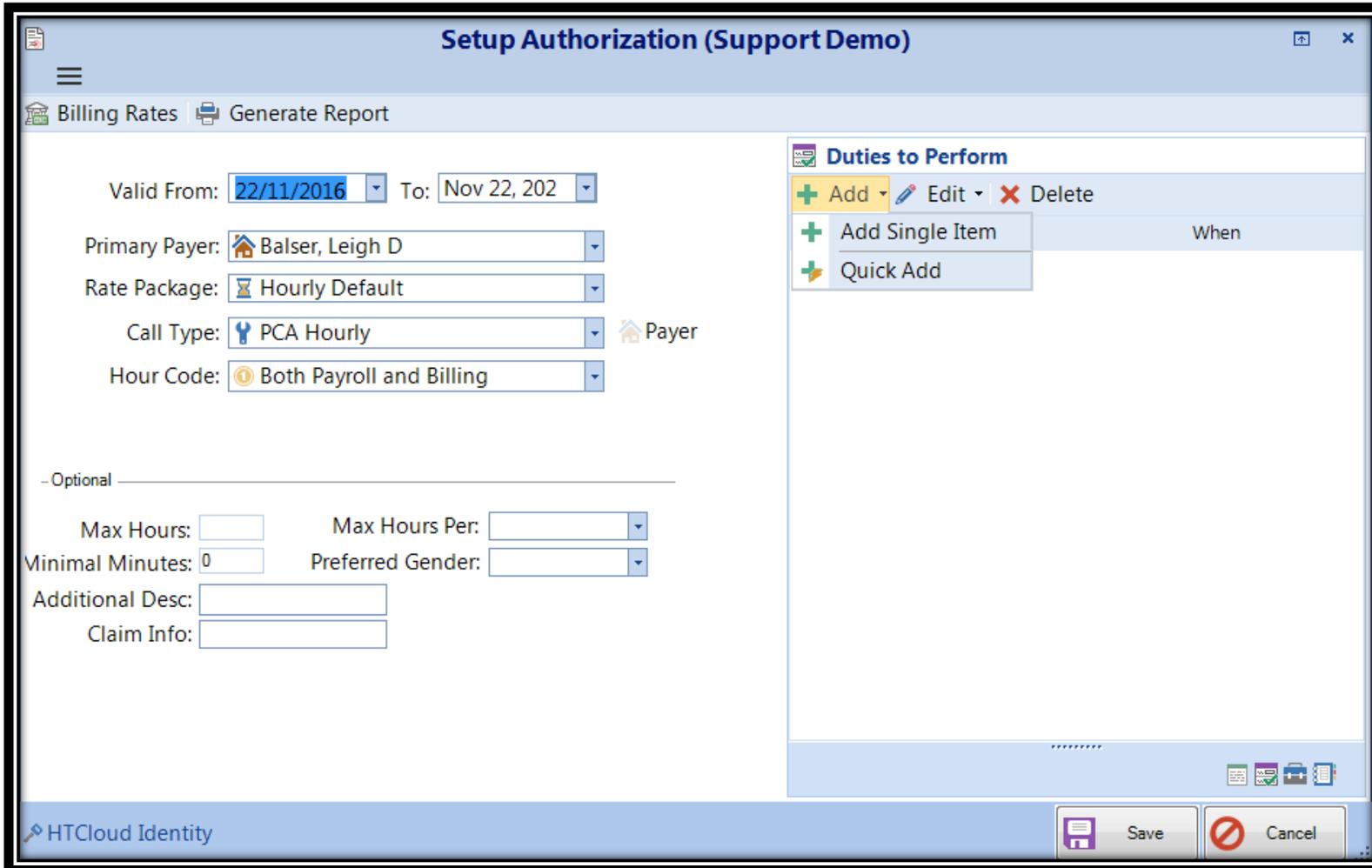
HTCloud Identity Save Cancel

WHAT'S NEEDED IN THE CLIENT'S AUTHORIZATION?

1. Primary Payer (who is paying the bill – **Client, Emergency Contact, Individual or 3rd Party Payer?**)
2. Check off what service(s) [Call Type(s)] are being provided
3. Select Rate Package (i.e. Hourly, 24 Hr Live In, Per Visit, etc.)
4. Select authorization Start dates (First day of services)
5. Enter in Bill Rate for that service

Click **SAVE**

Setting Up Duties to Perform Against the Client's Authorization



Setup Authorization (Support Demo)

Billing Rates Generate Report

Valid From: 22/11/2016 To: Nov 22, 202

Primary Payer: Balsler, Leigh D

Rate Package: Hourly Default

Call Type: PCA Hourly Payer

Hour Code: Both Payroll and Billing

- Optional -

Max Hours: Max Hours Per: Preferred Gender:

Minimal Minutes: 0

Additional Desc: Claim Info:

Duties to Perform

+ Add Edit Delete

+ Add Single Item When

+ Quick Add

HTCloud Identity Save Cancel

It is recommended to attach all tasks to be completed by the Caregiver to the Client's Authorization(s)!

Under the Authorizations tab, highlight the service you would like to add Duties to Perform to and click **Edit**.

Click on  to bring up the Duties to Perform information.

Select Quick Add to open up your Duties to Perform List.

Continued on Next Slide

Setting Up Duties to Perform Against the Client's Authorization Cont'd

<input checked="" type="checkbox"/> Add	Group	Task	Additional Information	<input type="checkbox"/> Sun	<input checked="" type="checkbox"/> Mon	<input type="checkbox"/> Tue	<input checked="" type="checkbox"/> Wed	<input checked="" type="checkbox"/> Thu	<input checked="" type="checkbox"/> Fri	<input checked="" type="checkbox"/> Sat	Minutes to Complete
<input type="checkbox"/>	Exercise	Assist w/ transfer on/off machine		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Exercise	Dancing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Exercise	Guide to machine		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Exercise	Stair Climbing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Exercise	Swimming		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Exercise	Tai Chi		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Exercise	Walking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Exercise	Weight Training		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Exercise	Yoga		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Housekeeping	Bathrooms		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Beds		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Change Linens		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Clean Bathrooms		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Clean Kitchen		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Dishes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	General Housekeeping		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Laundry		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Meal Preparation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Housekeeping	Shopping		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Simply click on the day(s) of the week in which a task should be performed by a Caregiver.

i.e. for Swimming, we selected Mondays and Thursdays for this task to be completed

If the task is to be completed as needed, simply check the box under the Add column.

Click **SAVE**

End Result After Saving

Duties to Perform (5)

+ Add - Edit - Delete

Duties to Perform

- ♥ Dancing (0069) (Sat) ← **Day Specific**
- ♥ Stair Climbing (0067) (Fri)
- ♥ Swimming (0068) (Mon, Thu)
- ♥ Walking (0066) (Wed)
- 🔔 Bathrooms (2000) ← **As Needed**

Click **SAVE** again to update the Authorization!

Client Billing Options

 Edit
 History

Bill Hours At:

Hours Ratio:

Mileage Rate:

Travel Rate Per Hour:

Max Minutes of Travel:

Bill Holiday Rate:

Bill Overtime:

One Invoice Per Client:

Actual > Sch, make Sch:

Actual < Sch, make Sch:

Send To Override:

Address Override:

Quickbook Class:

Provider ID:

Bill Rounded Hours At:

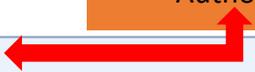
Invoice Term:

Invoice Promotion:

Invoice Instructions:

Description	Bill
Errand Miles	<input type="checkbox"/>
Expenses	<input type="checkbox"/>
Mileage	<input type="checkbox"/>
Per diem	<input type="checkbox"/>
Travel Time	<input type="checkbox"/>

SEND TO OVERRIDE
Another way for you to select the Emergency Contact, Individual or 3rd Party Payer's address shows on the invoice if not set up on the Authorization!



Billing Options can be individualized for each Client if needed. A default setup can be established in the Agency Office module when adding a new Client.

- Bill Hours At: Actual, Rounded or Scheduled
- What their Mileage/Travel Time rates are (Optional)
- If they get billed a Holiday rate (Optional)
- If they get billed Overtime (Optional)
- If they get billing for additional expense(s) (Errand Miles, Expenses, Mileage, Per Diem or Travel Time)

Creating the Client Care Plan (Optional)



- **PROFILE** – Make sure address is accurate and complete.
- **HOME HEALTH EVALUATION** – Click on each list and check off which items apply to that client
 - Activities Permitted, Diet, Allergies, Equipment, Mental Status, Prognosis
- **MEDICATION** (Optional) – Add the individual medication, dose, frequency, status and date
- **CHARACTERISTICS** (Optional) – Check off the Likes, Dislikes and Personality Traits about the client; this will assist in finding the appropriate Caregiver to send for these visits [Caregiver Suggestion]
- **EMERGENCY CONTACTS** – Add all that are needed
- **INDIVIDUALS** – Add all that are needed (i.e. Doctor, Lawyer, Relative, etc.)

****NOTE** Each Care Plan section gives you the option of adding in a Profile Note, which will show under the appropriate section when generating the Care Plan Report.**

Adding in a New Caregiver

Setup completed in Relationship Management Module – Caregiver tab – Click



1. First & Last Name
2. Address
3. Phone Number
4. Hire Date Status and Date (First Day of Employment)
5. Email Address (for accessing HomeTrak Mobile app and HomeTrak Online)
6. Payroll Rate(s)
7. Payroll Options

Adding in a New Caregiver (Continued)

1 Name: [Text Field]

2 Address 1: [Text Field]
Address 2: [Text Field]

3 Status: Hire Date
Date: Nov 21, 201 [Date Picker] 12:00 AM [Time Picker]

4 Phone: 0- [Text Field] x: [Text Field]
Phone 2: 0- [Text Field] x: [Text Field]

5 Email: [Text Field]

Role: Caregiver
Category: Unspecified
Type: Home
City: [Text Field]
State: [Text Field]
Zip: [Text Field]
District: [Text Field]
Gender: Unspecified

Language: English
Rank: Average

Referral Category: [Text Field]
Referrer: [Text Field]
Organization: [Text Field]
Event Pattern: [Text Field]

HTCloud Identity [Save] [Cancel]

INFORMATION REQUIRED FOR ADDING IN A NEW CAREGIVER

1. First & Last Name
2. Address
3. Hire Date Status and Date (date started with company)
4. Phone Number
5. Email Address (for accessing HomeTrak Mobile and HomeTrak Online web page)

Click **SAVE**

Adding in a Caregiver's Payroll Rate

Payroll Rate (Support Demo)

Valid From: 01/01/1999 To: 31/12/2099

Rate Type: Hourly

Call Type:

Specific Person:

Rate: \$0.000

HTCloud Identity Save Cancel

RATE TYPE SPECIFIC

This is used if the Caregiver gets paid the same wage for all work performed.

- Select **Hourly** Rate Type
- In the **Rate** field, type in their Hourly rate.
- **SAVE**

CALL TYPE SPECIFIC

This is used when a Caregiver gets paid different for each Call Type.

- Select **Hourly** Rate Type
- Select **Call Type**
- In the **Rate** field, type in their rate of pay for this service
- Repeat for all other services (Call Types) the Caregiver works
- **SAVE**

CLIENT SPECIFIC

This is used when a Caregiver gets paid a different amount with working with a specific Client.

- Select **Hourly** Rate Type
- Select **Call Type**
- Search for and add in Client's name in **Specific Person**
- In the **Rate** field, input rate of pay when Caregiver works with that client
- **SAVE**

Caregiver Payroll Options

Payroll Options

Edit History

Pay Hours At:

Hours Ratio:

Mileage Rate:

Travel Rate Per Hour:

Max Minutes of Travel:

Pay Holiday Rate:

Pay Overtime:

Actual > Sch, Pay Sch:

Actual < Sch, Pay Sch:

Send To Override:

Address Override:

Quickbook Class:

Pay Rounded Hours At:

Pay Stub Informati...:

Payroll Instructions:

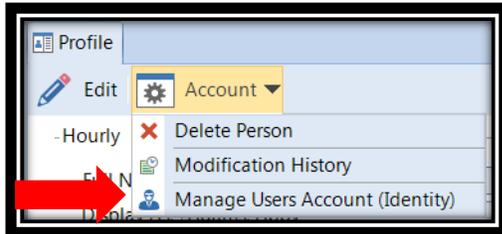
Description	Pay
Errand Miles	<input checked="" type="checkbox"/>
Expenses	<input checked="" type="checkbox"/>
Mileage	<input checked="" type="checkbox"/>
Per diem	<input checked="" type="checkbox"/>
Travel Time	<input checked="" type="checkbox"/>

The Payroll Options can be individualized for each Caregiver if warranted. A default setup can be established in the Agency Office module when adding a new Caregiver.

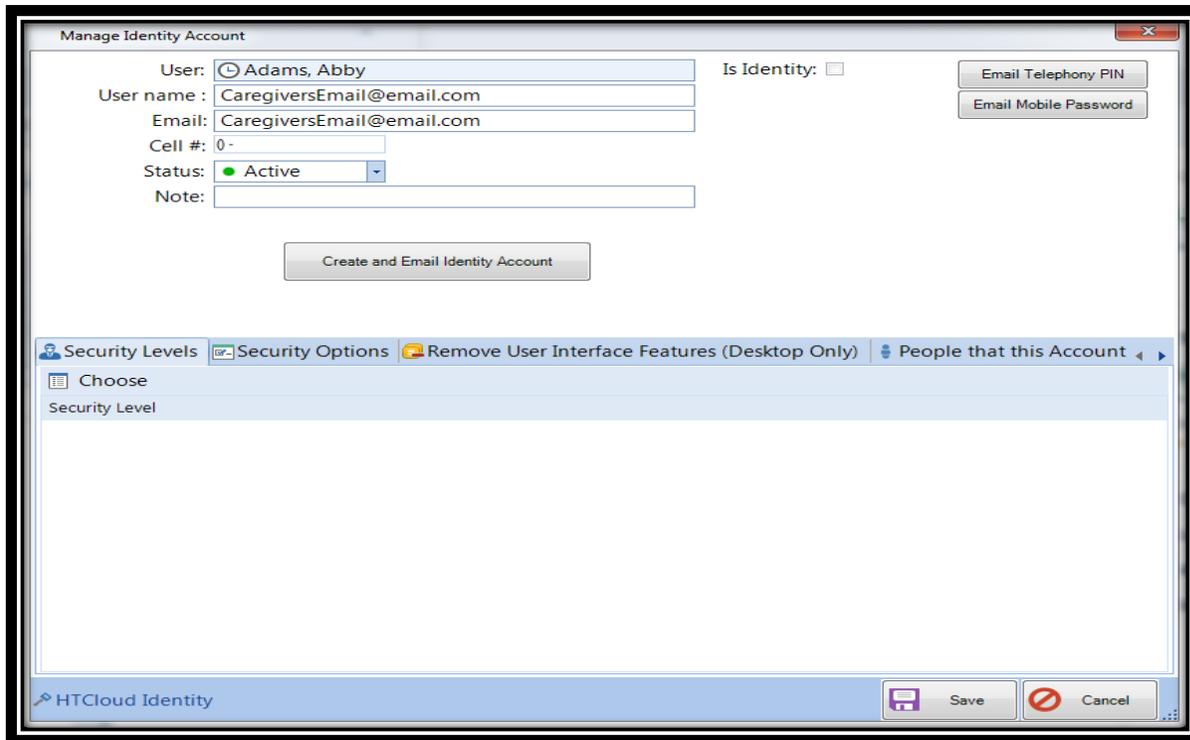
- Pay Hours At: Actual, Rounded or Scheduled
- What their Mileage/Travel Time rates are (optional)
- If they get paid a Holiday rate
- If they get paid Overtime
- If they receive additional reimbursement(s) (Errand Miles, Expenses, Mileage, Per Diem or Travel Time)

Creating an Identity Account for Caregivers

Identity Accounts are set up in Relationship Management – Caregivers tab - Profile



Click on *Account* to access the drop down list; select **Manage Users Account (Identity)**



Manage Identity Account

User: Adams, Abby Is Identity:

User name: CaregiversEmail@email.com Email Telephony PIN

Email: CaregiversEmail@email.com Email Mobile Password

Cell #: 0 -

Status: Active

Note:

Create and Email Identity Account

Security Levels Security Options Remove User Interface Features (Desktop Only) People that this Account

Choose

Security Level

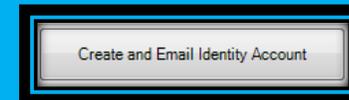
HTCloud Identity Save Cancel

When the **Manage Users Account (Identity)** screen opens, it will prefill with the Caregiver's email address as BOTH their User Name and Email. Leave this as is.

Status MUST be:



Click:



The Caregiver will then receive an email from **HOMETRAK IDENTITY** to activate their account and create password to log in to HomeTrak Mobile and HomeTrak Online.