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.

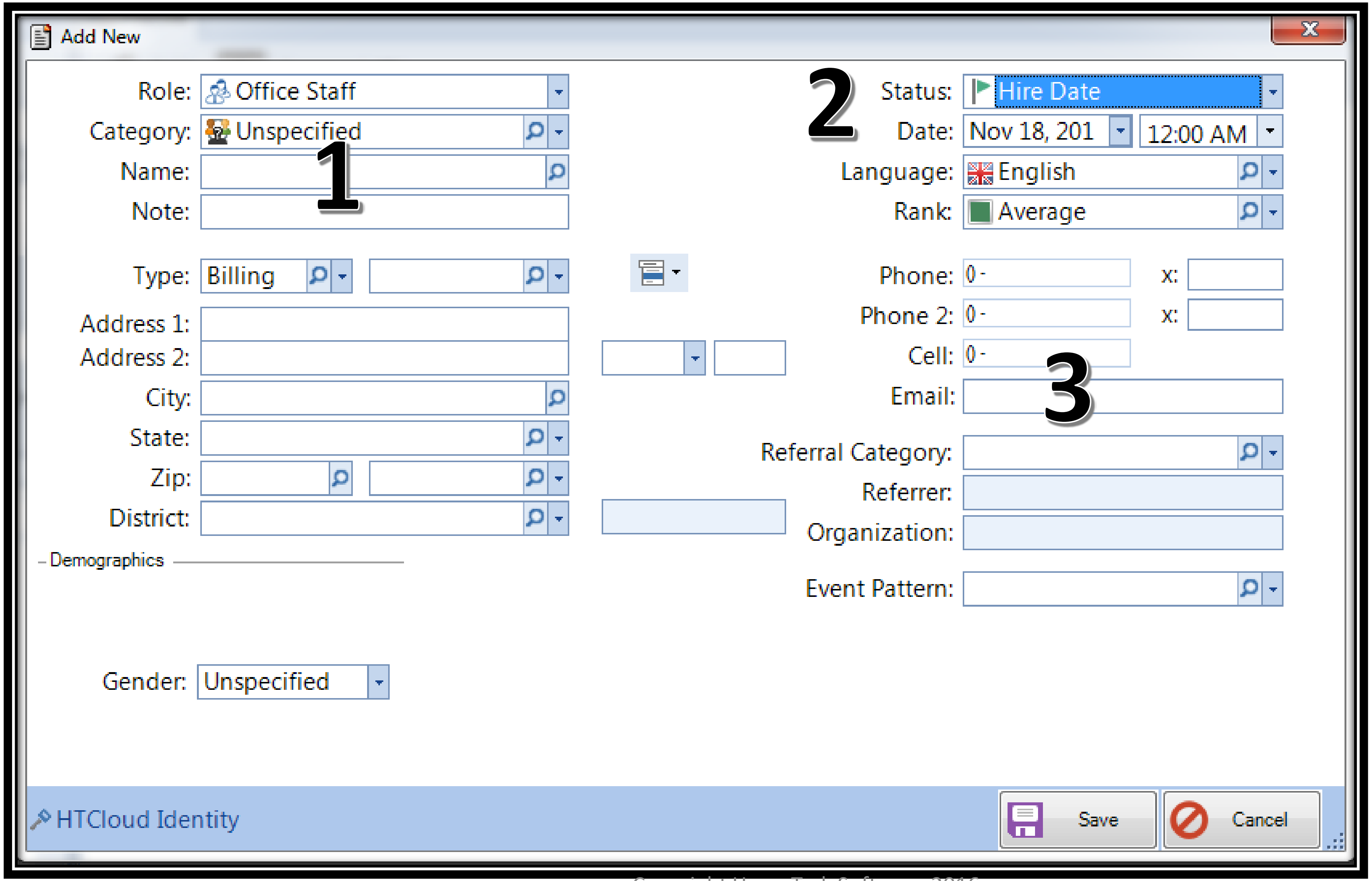
Adding a New Office Staff Person

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)

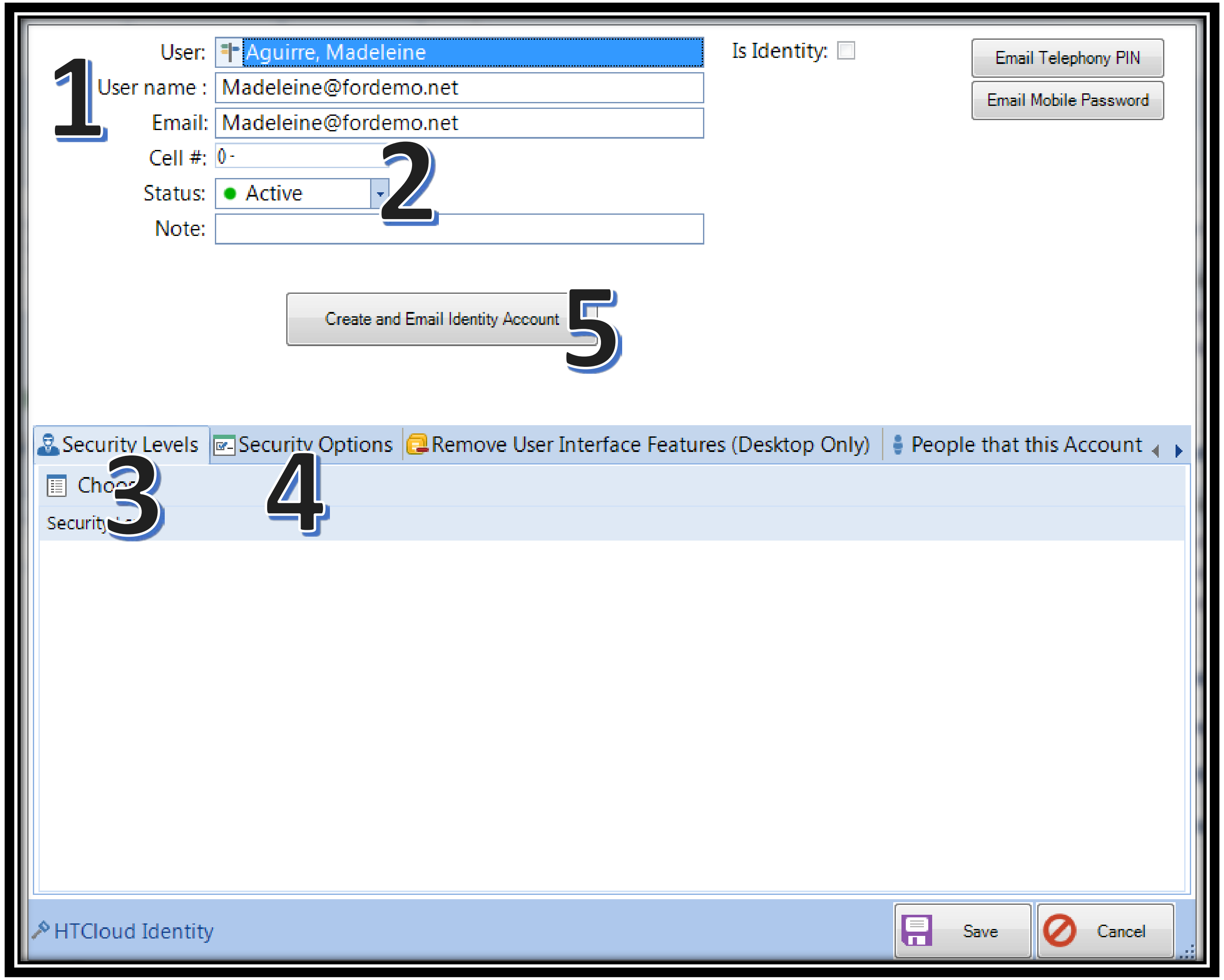
Upon typing in the above information, you will click SAVE to create the profile. The ‘Manage Users Account (Identity)’ screen will then open.



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 <u>MUST</u>** 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)



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!

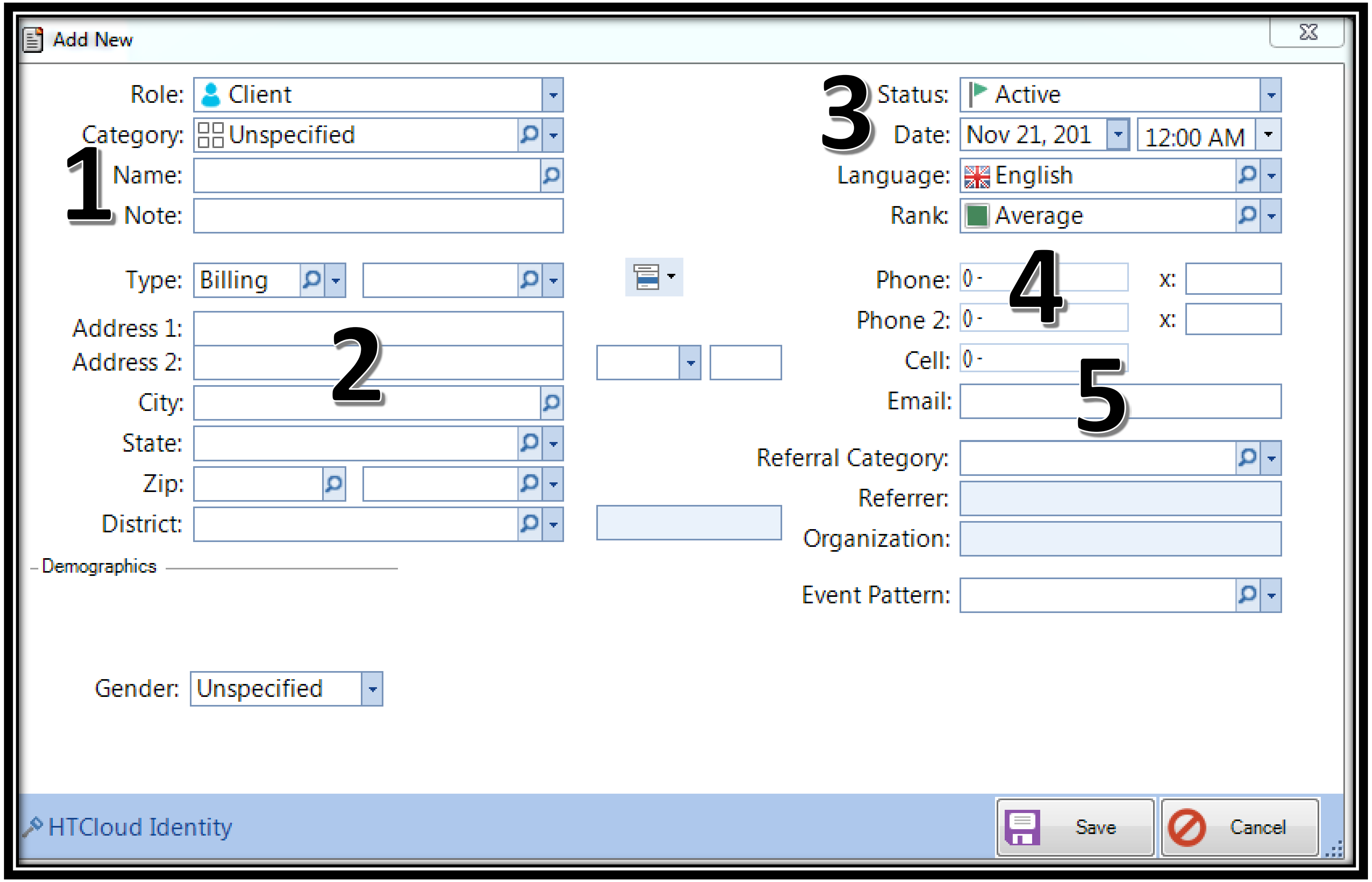
Adding a New Client

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)

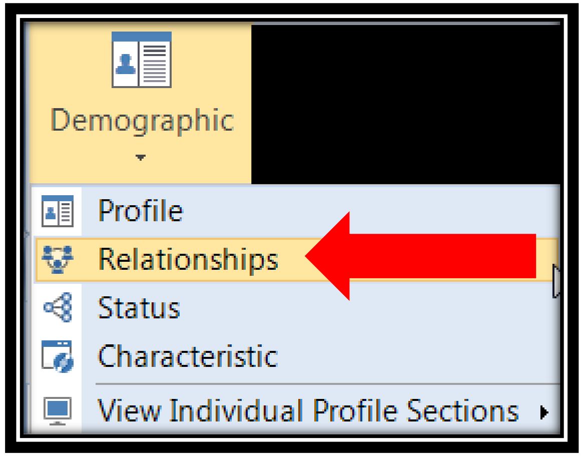


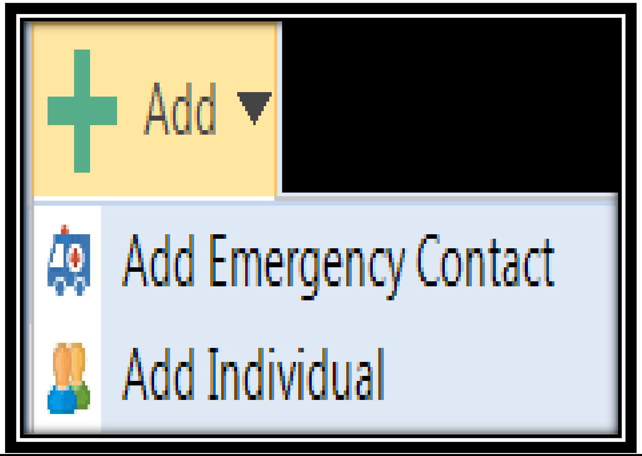
CLIENT INFORMATION REQUIREMENTS:

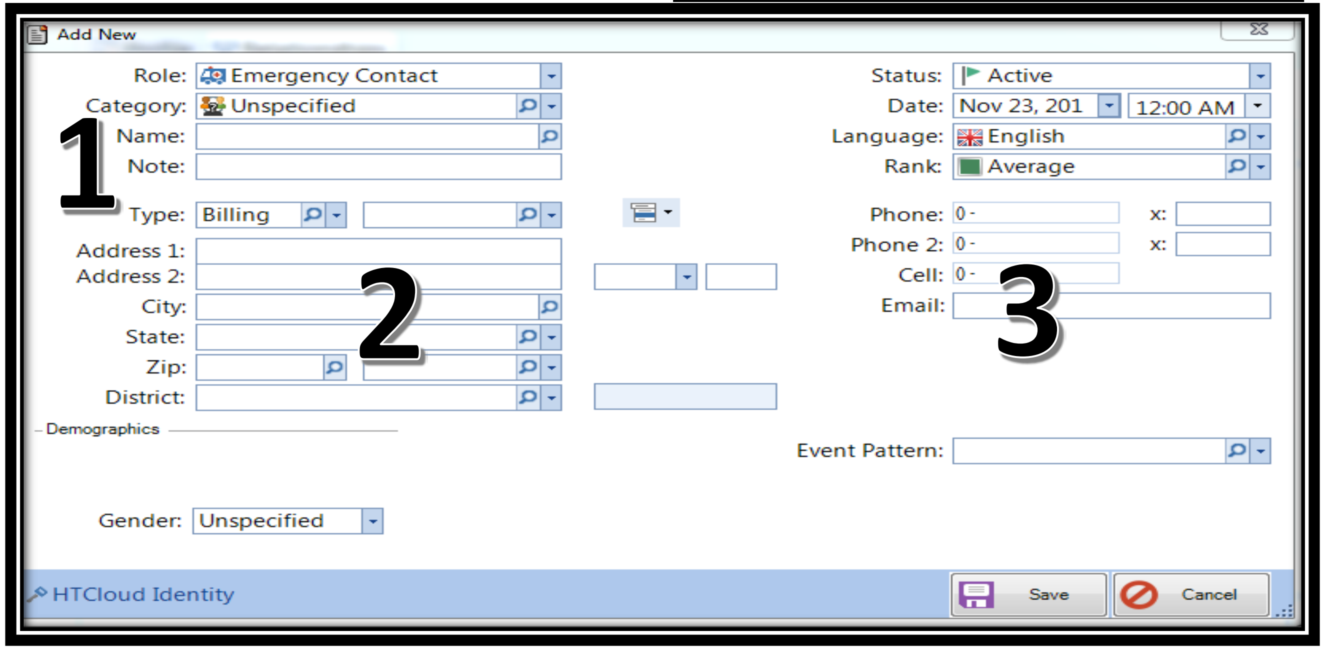
1. **First & Last Name**
2. **Address (for GPS)**
3. **Active Status & Status Date**
4. **Phone Number**
5. **Email Address (if wanting access to the Mobile App)**

Click SAVE

Adding a Relationship





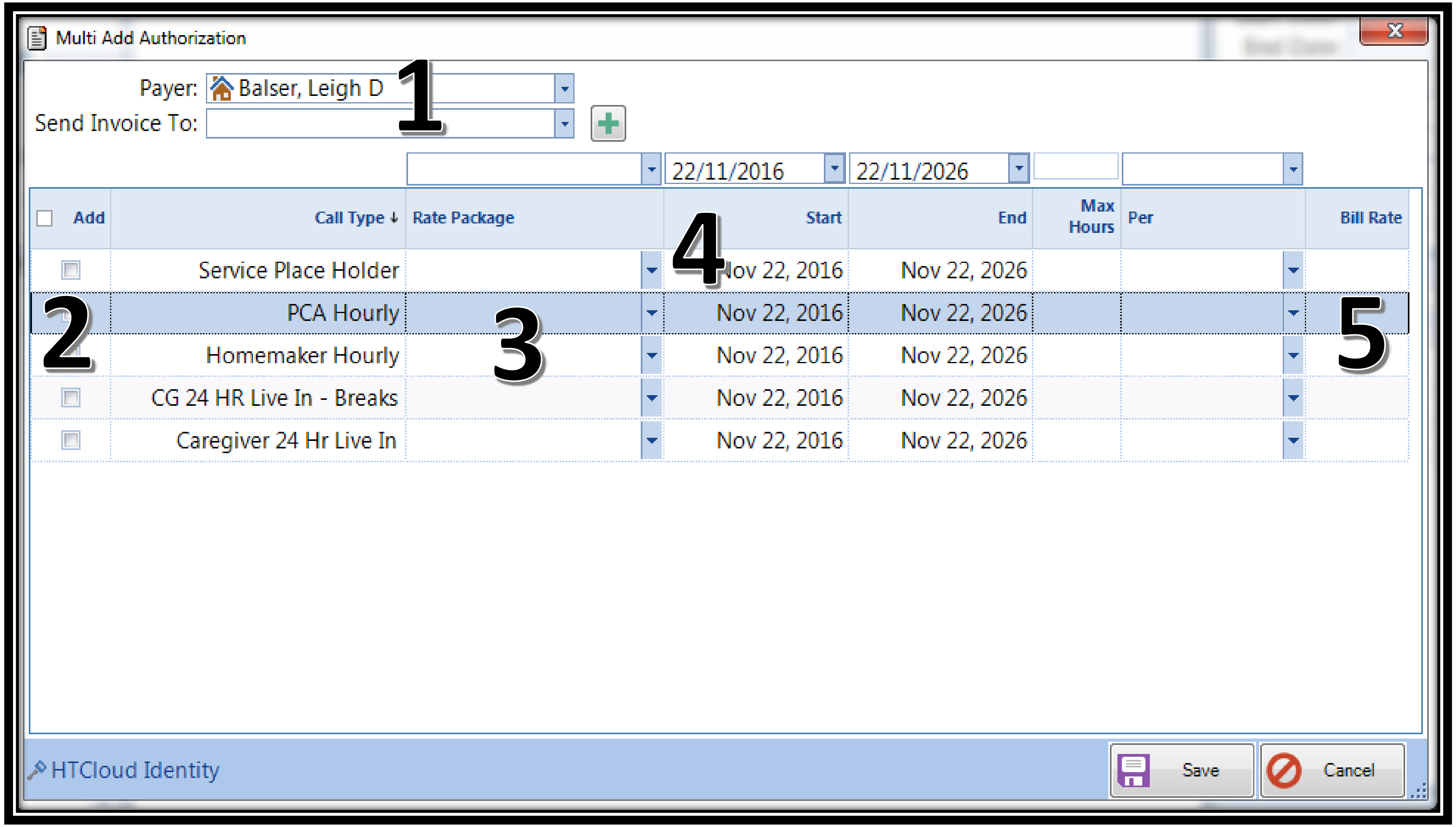


WHAT DO I NEED WHEN ADDING IN A RELATIONSHIP TO A CLIENT?

1. First & Last Name
2. Address (required if this person will be receiving and paying the invoice).
   Slide 13 shows where to attach that person for billing purposes!
3. Phone Number or Email Address

Click **SAVE**

Setting Up a Client Authorization

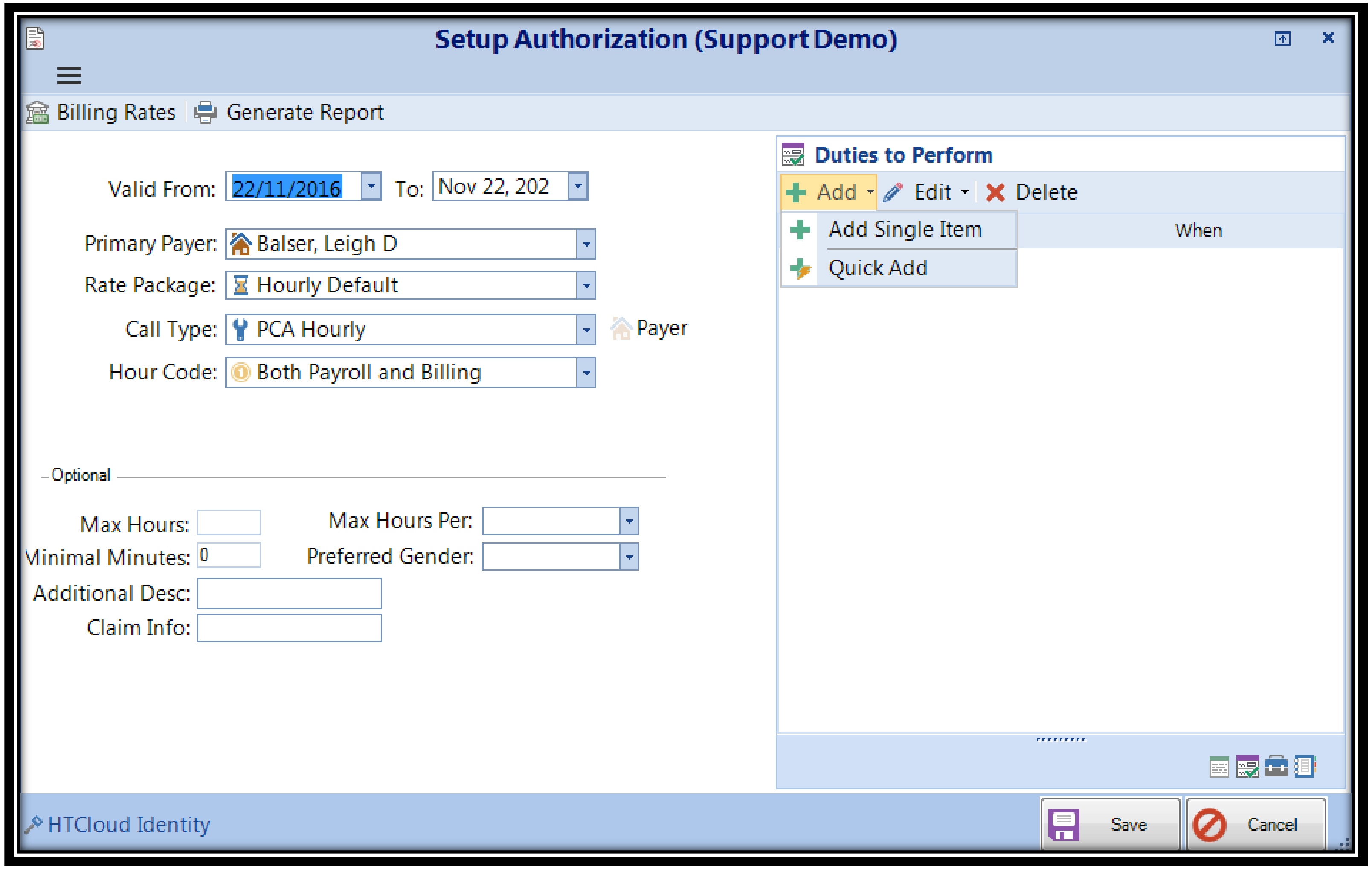


WHAT'S NEEDED IN THE CLIENT'S AUTHORIZATION?

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



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

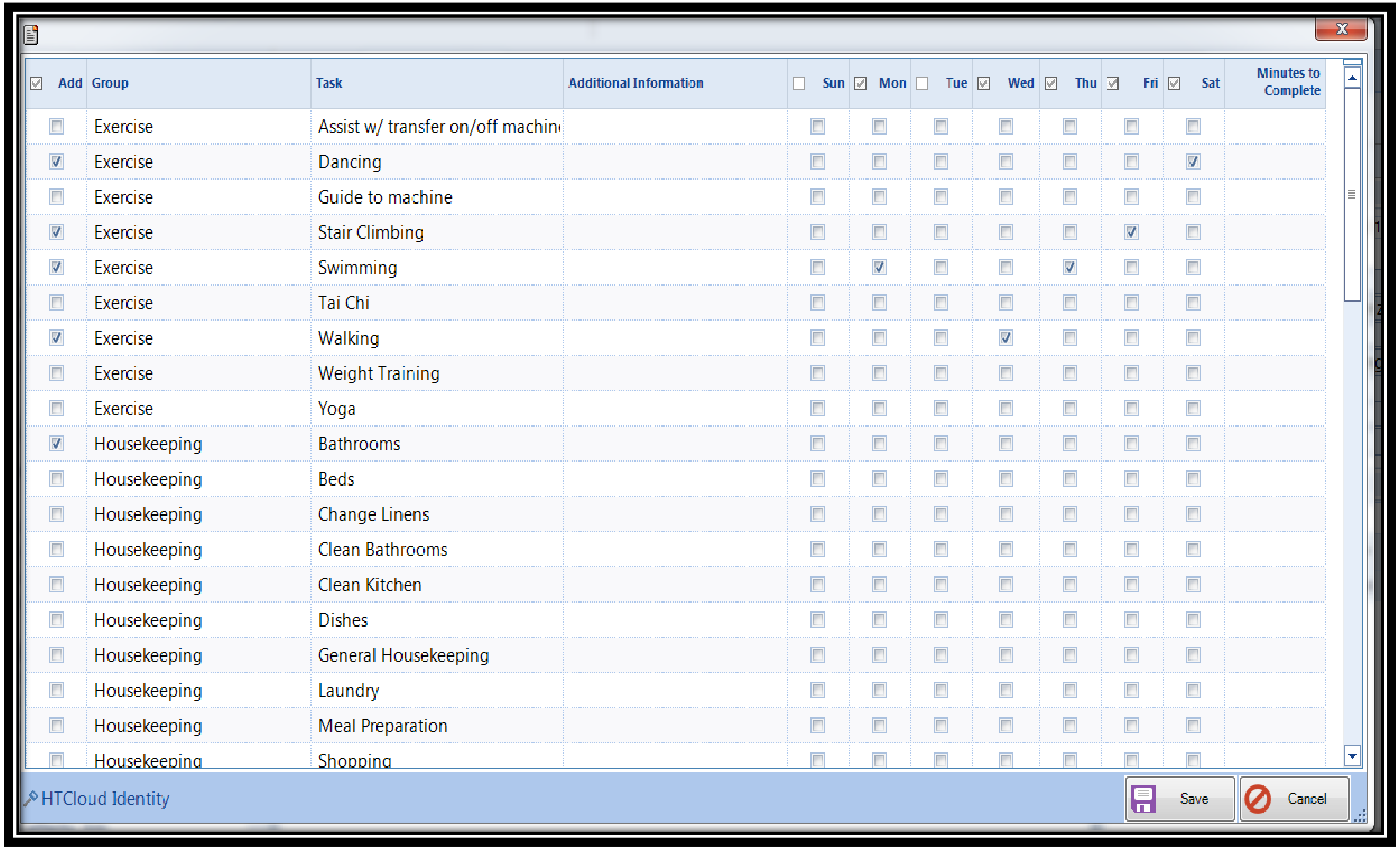
Under the Authorizations tab, highlight the service you would like to add Duties to Perform to and click **Edit**.

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



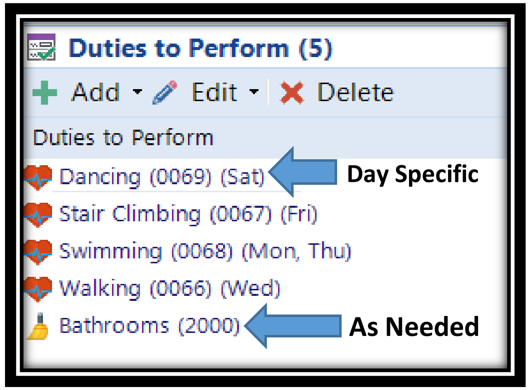
Add	Group	Task	Additional Information	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Minutes to Complete
☐	Exercise	Assist w/ transfer on/off machin		☐	☐	☐	☐	☐	☐	☐	
☑	Exercise	Dancing		☐	☐	☐	☐	☐	☐	☑	
☐	Exercise	Guide to machine		☐	☐	☐	☐	☐	☐	☐	
☑	Exercise	Stair Climbing		☐	☐	☐	☐	☐	☑	☐	
☑	Exercise	Swimming		☐	☑	☐	☐	☑	☐	☐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

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.

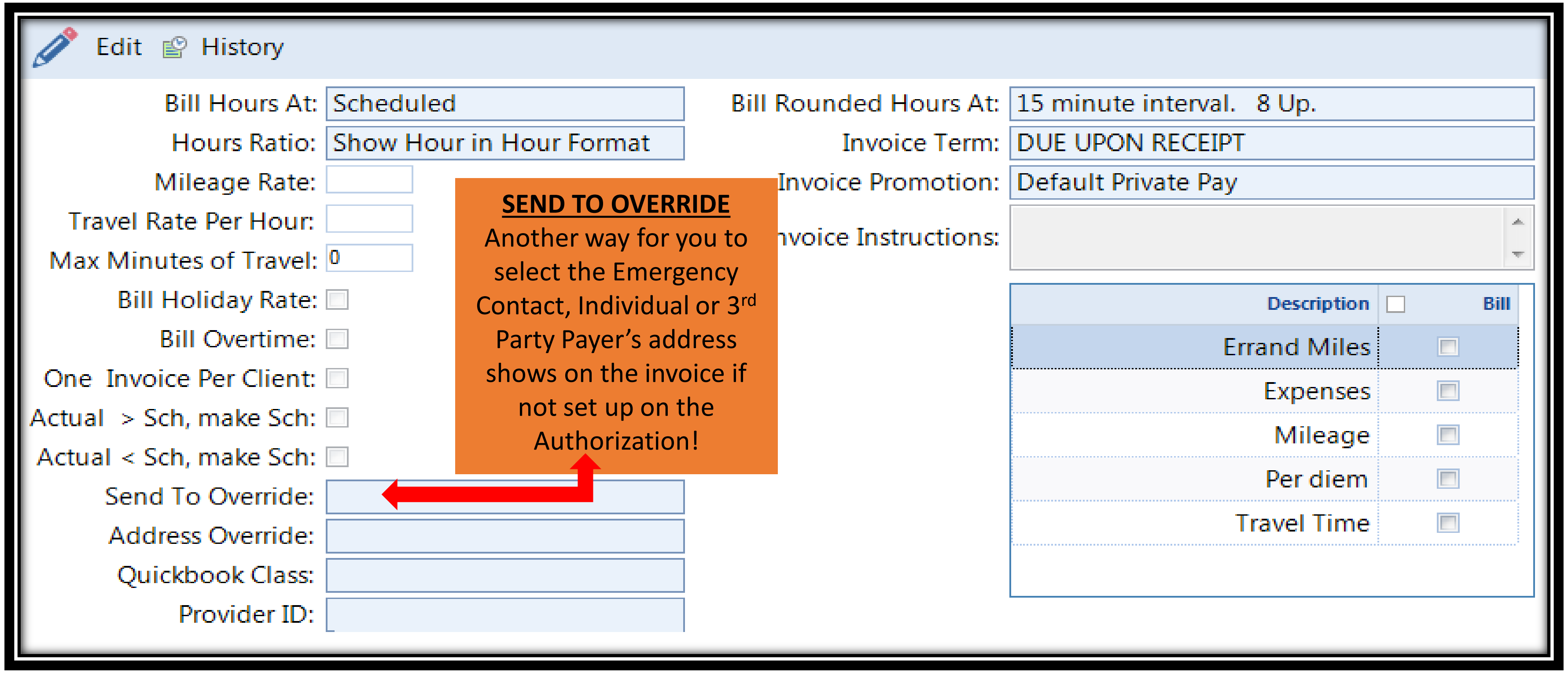
Click **SAVE**

End Result After Saving



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

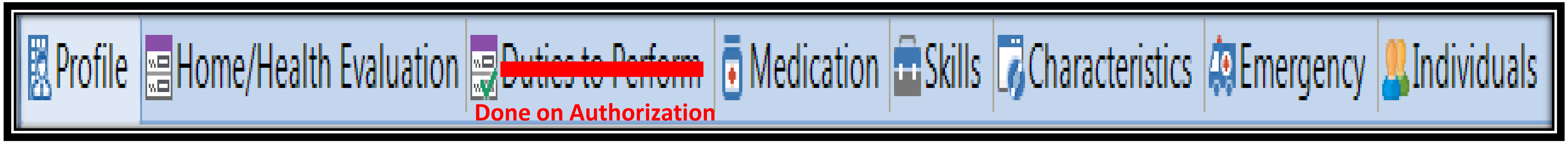
Client Billing Options



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.)

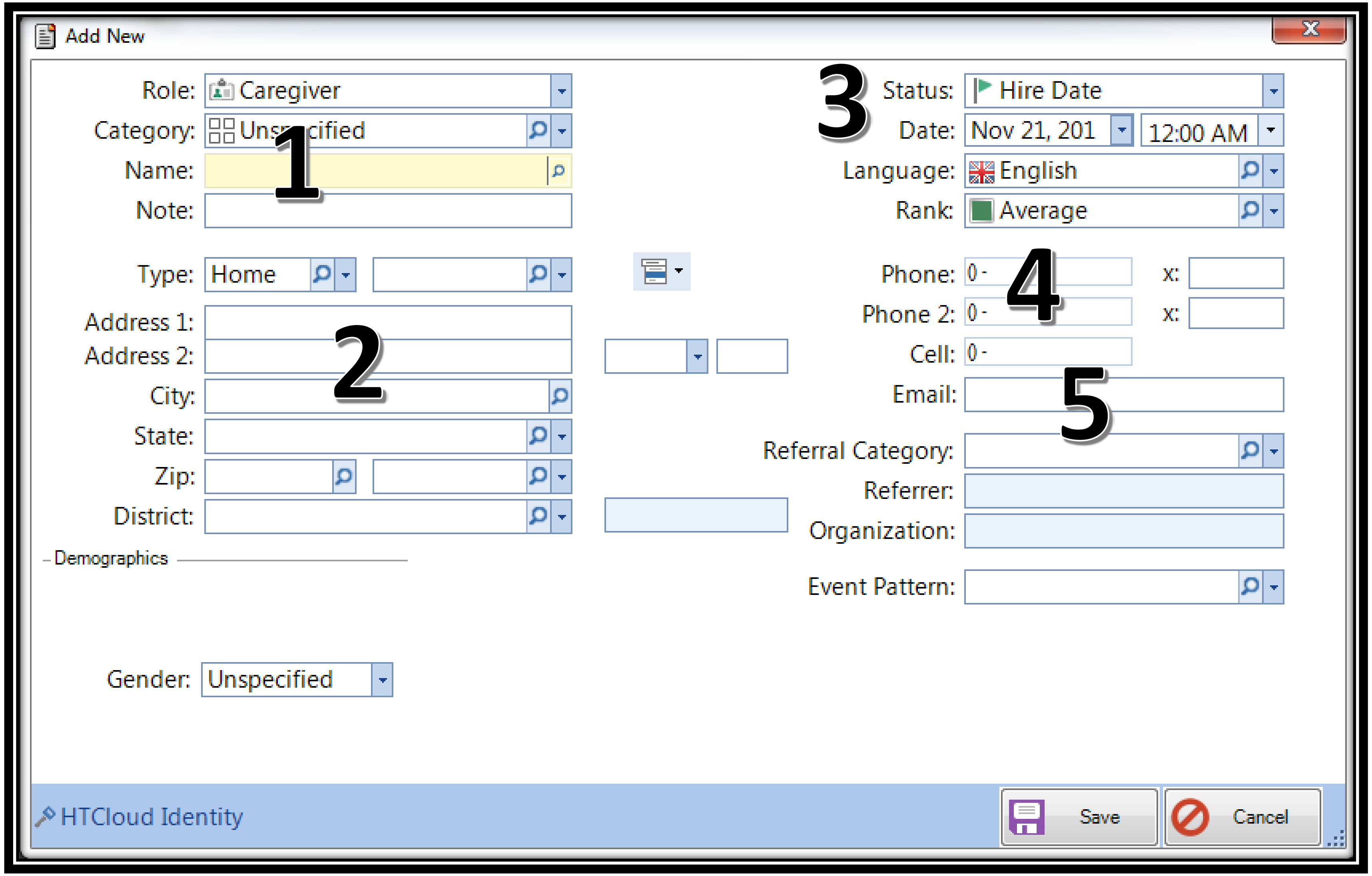
****NOTE** Each Care Plan section gives you the option of adding in a Profile Note, which will show under the appropriate section when generating the Care Plan Report.**

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)

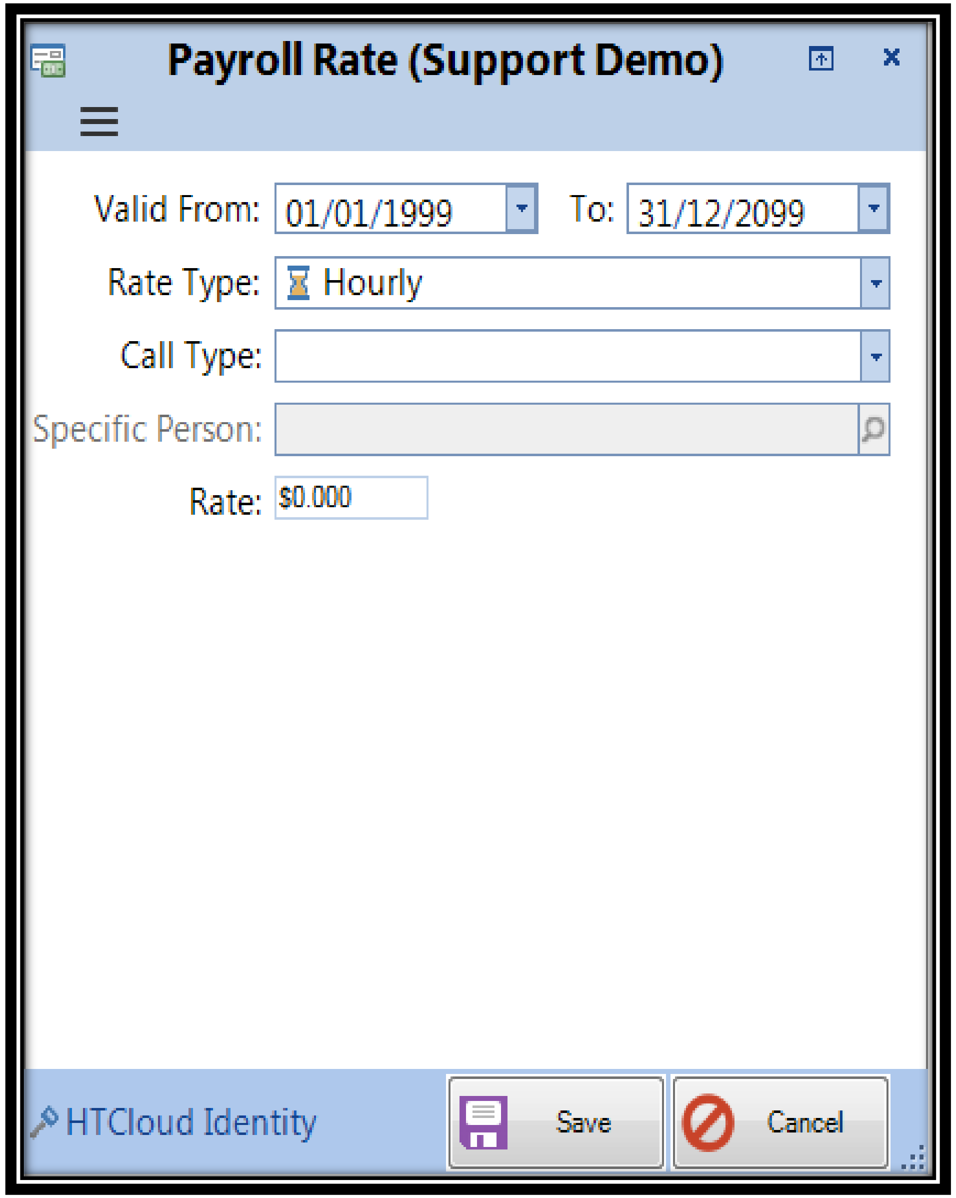


<u>INFORMATION REQUIRED FOR ADDING IN A NEW CAREGIVER</u>

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 **<u>SAVE</u>**

Adding in a Caregiver’s Payroll Rate



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.

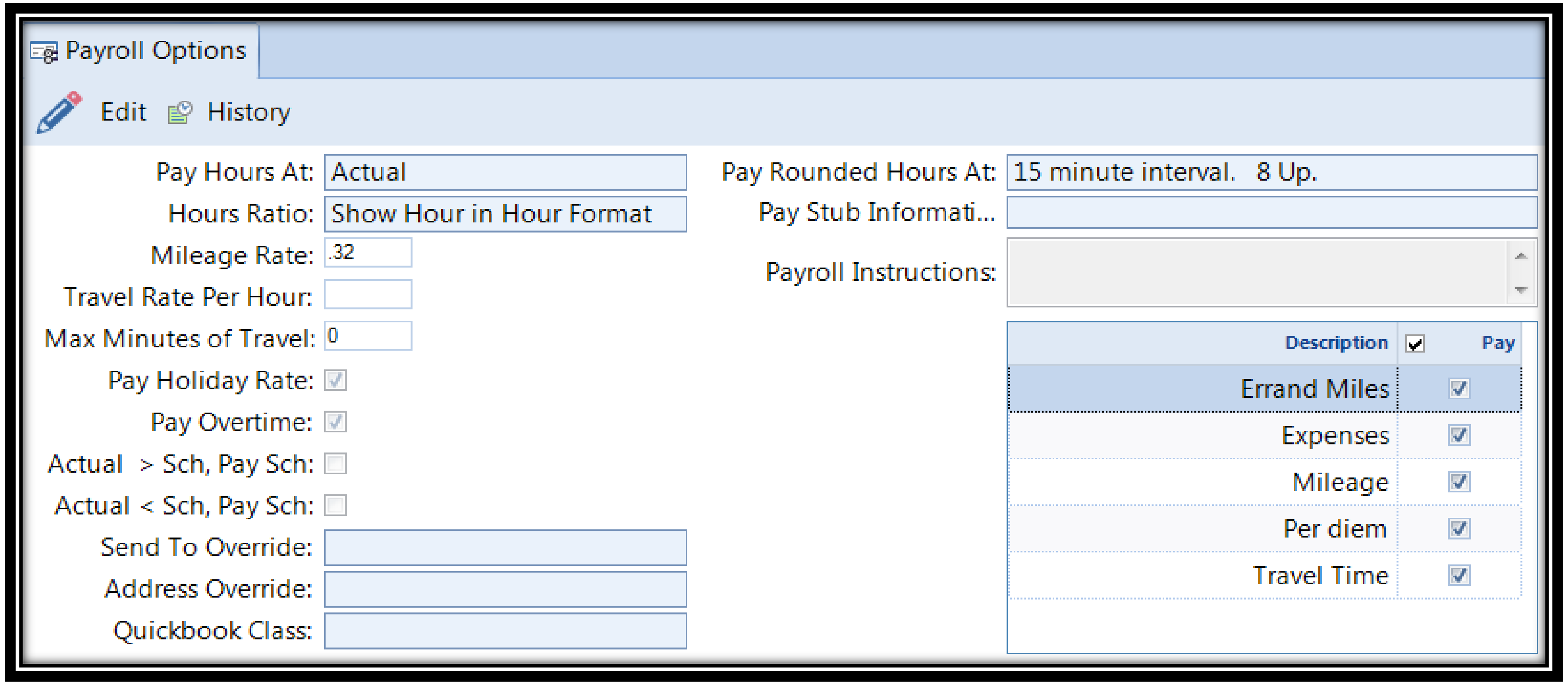
- Select **Hourly** Rate Type
- Select **Call Type**
- In the **Rate** field**,** type in their rate of pay for this service
- Repeat for all other services (Call Types) the Caregiver works
- **SAVE**

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

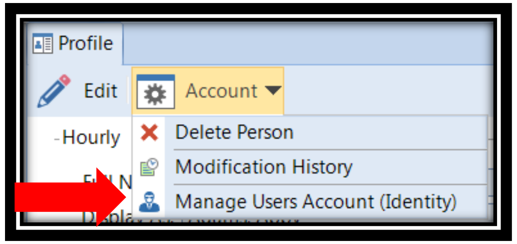


The Payroll Options can be individualized for each Caregiver if warranted. A default setup can be established in the Agency Office module when adding a new Caregiver.

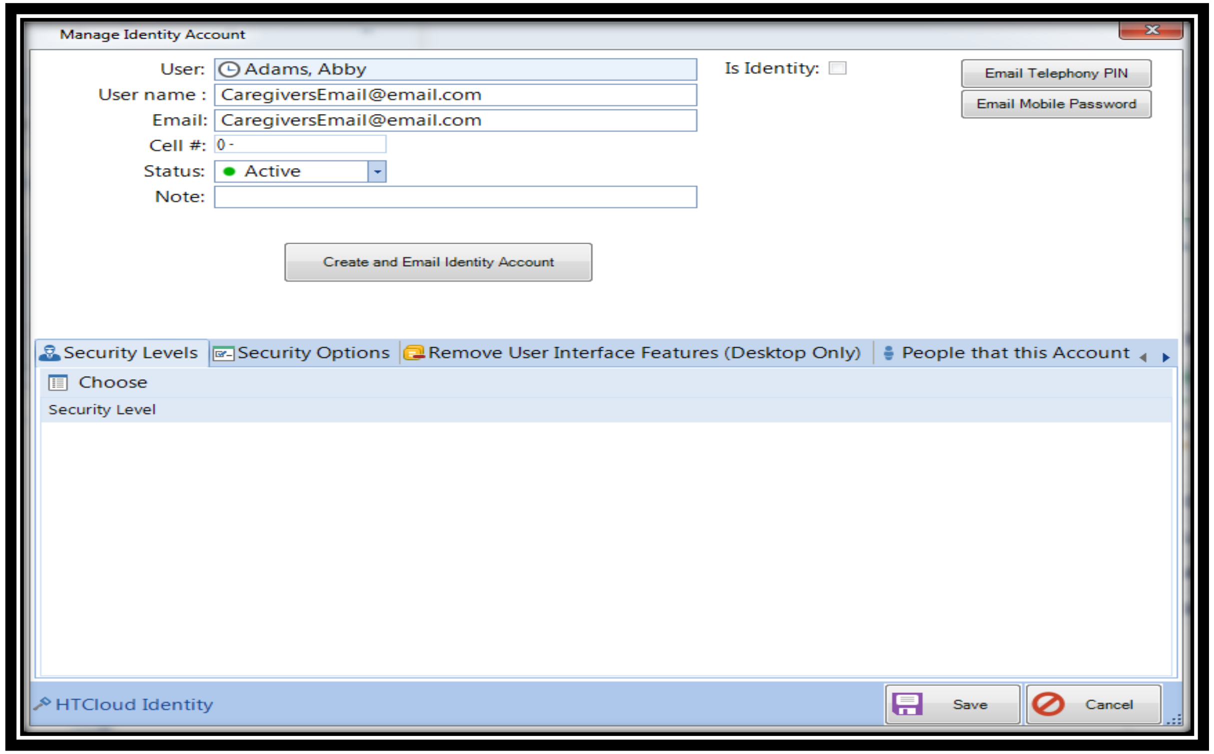
- Pay Hours At: Actual, Rounded or Scheduled
- What their Mileage/Travel Time rates are (optional)
- If they get paid a Holiday rate
- If they get paid Overtime
- If they receive additional reimbursement(s) (Errand Miles, Expenses, Mileage, Per Diem or Travel Time)

Creating an Identity Account for Caregivers

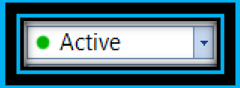
Identity Accounts are set up in Relationship Management – Caregivers tab - Profile

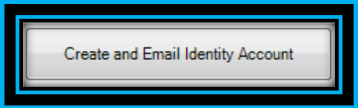


Click on *Account* to access the drop down list; select ***Manage Users Account (Identity)***



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 <u>MUST</u> be: 

Click: 

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