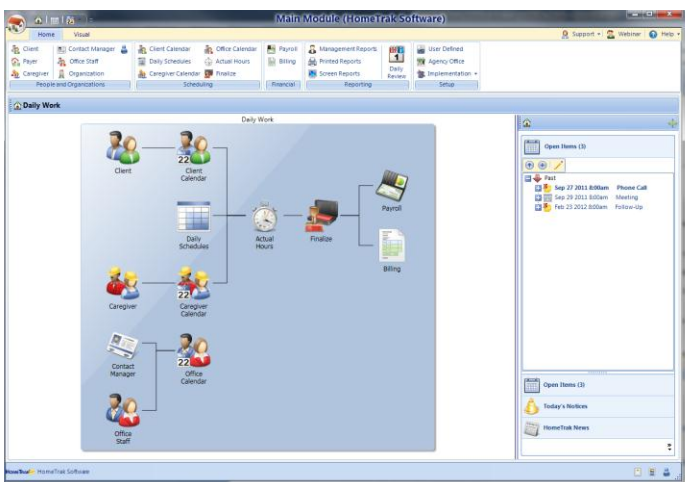
MIGRATING FROM HOMETRAK 7.1 TO HOMETRAK COMPANION

- This document was created to help you plan and perform the migration process.
- Depending on the size of your organization, the migration process could be quite lengthy.   Please make sure that you have the time to do the migration correctly.
- If Companion is missing a feature that is critical to your business, please let us know what this feature is. Do not migrate until you contact HomeTrak.
- It is important that you review all documentation, and understand what Companion can and cannot do before you do the final migration.
- Make sure that all users of HomeTrak 7.1 are included in the migration process, and that each one of them have a chance to use Companion before the final migration.
- HomeTrak will help you do the migration process, and answer questions you may have, but we do expect you to view the online help, view the tutorials and watch the webinars before calling support.



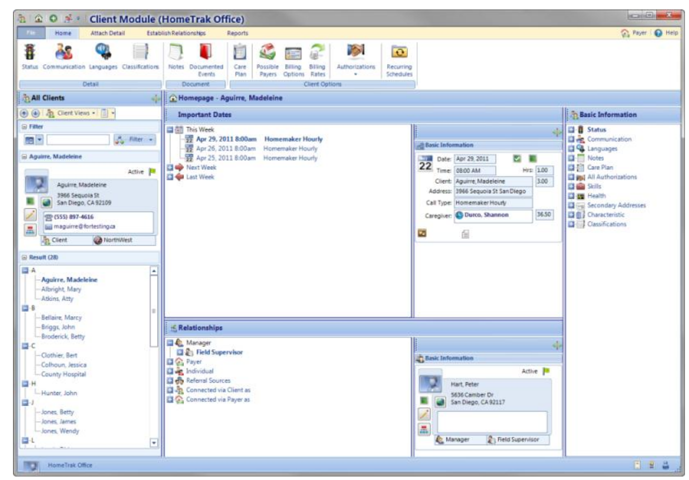
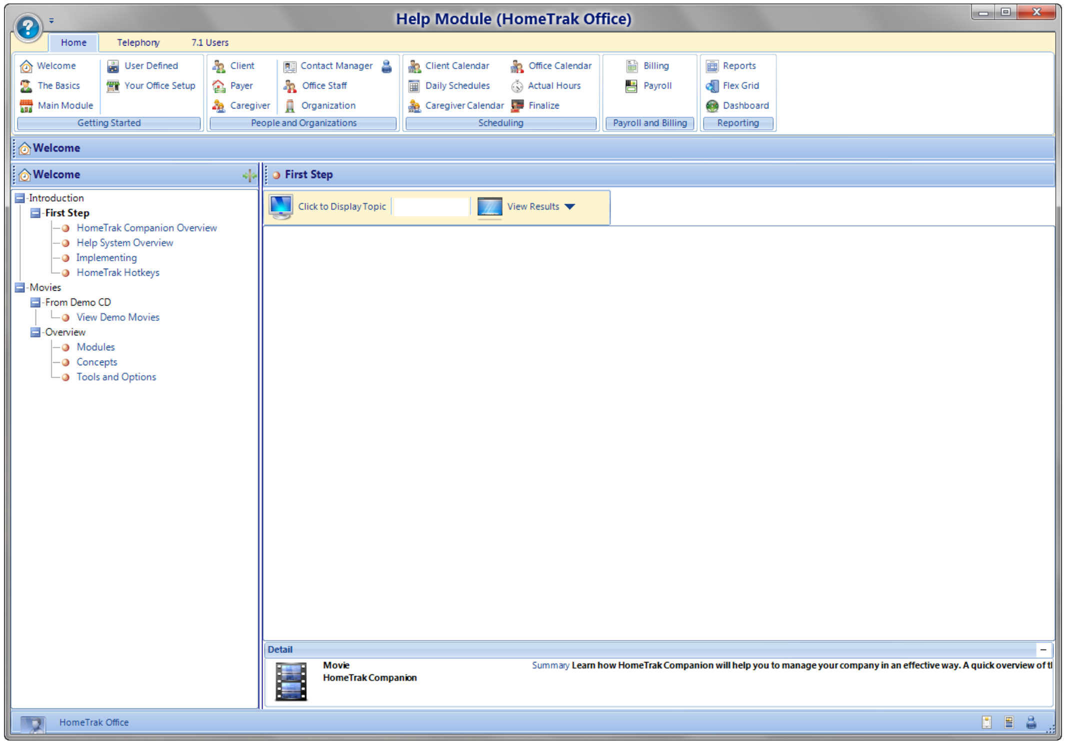


Table of Contents

Viewing the webinars and tutorials is a great way to familiarize yourself with the various modules and features of HomeTrak Companion. There is a group of tutorials that compare various functions and modules in 7.1 to those in Companion. You can find these tutorials by clicking on the Help button in the Main Module of Companion. From there, click on the “7.1 Users” tab up at the very top of the screen, then click on the “Differences” button in the ribbon. Click on “Comparison Tutorials” and you’ll see several tutorials to view.

Flow diagrams can be found by clicking the Help button pull-down menu and selecting “How To” flow diagrams.



Suggested Time Tables

Companies with less than 100 active clients

- **Stage 1 (Week 1 - 2)**
  - ☐ Assign one person to be the migration leader to make sure everyone does their jobs.
  - ☐ Review Migration Project. (Page 7)
  - ☐ Assign one person to review and fix Clients with incorrect information. (Pages 8 - 10)
  - ☐ Assign one person to review and fix caregivers with incorrect information (Page 11)
  - ☐ Complete on-line 'HomeTrak 7.1 to Companion Migration' Initial Survey
- **Stage 2 (Week 3)**
  - ☐ Download and install databases and complete the first migration as outlined
  - ☐ Download Install user on each workstation that will use companion
  - ☐ Enroll and attend live webinars or watch previously recorded webinars
- **Stage 3 (Week 4)**
  - ☐ If not already completed, view webinars 2 - 4
  - ☐ Do items in "Migration Items to Complete - People and Schedules" (Pages 12 – 13)
  - ☐ Have a staff meeting to determine if there are any areas where your office will no longer function correctly if you migrate.
    - If concerns arise, please email them to your HomeTrak Consultant.
- **Stage 4 (Week 5 - 6)**
  - ☐ If not already completed, view webinars 5 & 6
  - ☐ Do items in "Practice Payroll and Billing" at least twice (Page 14)
  - ☐ Do a Mock Billing/Payroll Run at least twice (Pages 15 - 16)
- **Stage 5 (End of Week 6)**
  - ☐ Have a staff meeting to determine if there are any areas where your office will no longer function correctly if you migrate.
    - If concerns arise, please email them to your HomeTrak Consultant.
- **Stage 6 (Beginning of Week 7)**
  - ☐ Complete on-line 'HomeTrak 7.1 to Companion Migration' Final Survey
- **Stage 7 (Final Migration Middle of week 7)**
  - ☐ Run migration again after payroll and billing is completely finished in 7.1.
    - Payroll and Billing must be posted.
    - Invoices should be printed.
    - Payroll and Billing must be exported to whatever external packages you use.
  - ☐ After migration is completed, call HomeTrak support for final migration configuration.

Companies with 100 to **400 Active Clients

- **Stage 1 (Week 1 - 3)**
  - ☐ Assign one person to be the migration leader to make sure everyone does their jobs.
  - ☐ Review Migration Project. (Page 7)
  - ☐ Assign one person to review and fix Clients with incorrect information. (Pages 8 - 10)
  - ☐ Assign one person to review and fix caregivers with incorrect information (Page 11)
  - ☐ Complete on-line 'HomeTrak 7.1 to Companion Migration' Initial Survey
- **Stage 2 (Week 3 - 4)**
  - ☐ Download and install databases and complete the first migration as outlined
  - ☐ Download Install user on each workstation that will use companion
  - ☐ Enroll and attend live webinars or watch previously recorded webinars
- **Stage 3 (Week 5)**
  - ☐ If not already completed, view webinars 2 - 4
  - ☐ Do items in "Migration Items to Complete - People and Schedules" (Pages 12 - 13)
  - ☐ Have a staff meeting to determine if there are any areas where your office will no longer function correctly if you migrate.
    - If concerns arise, please email them to your HomeTrak Consultant.
- **Stage 4 (Week 6 - 10)**
  - ☐ If not already completed, view webinars 5 & 6
  - ☐ Do items in "Practice Payroll and Billing" at least twice (Page 14)
  - ☐ Do a Mock Billing/Payroll Run at least twice (Pages 15 - 16)
  - ☐ Have a staff meeting to determine if there are any areas where your office will no longer function correctly if you migrate.
    - If concerns arise, please email them to your HomeTrak Consultant.
- **Stage 5 (Week 11)**
  - ☐ Have all employees come into the office for a Saturday morning, and do nothing but work on Companion.
  - ☐ Have a staff meeting after to determine if there are any areas where your office will no longer function correctly if you migrate.
    - If concerns arise, please email them to your HomeTrak Consultant.
- **Stage 6 (Beginning of Week 12)**
  - ☐ Complete on-line 'HomeTrak 7.1 to Companion Migration' Final Survey
- **Stage 7 (Final Migration Middle of Week 12)**
  - ☐ Run migration again after payroll and billing is completely finished in 7.1.
    - Payroll and Billing must be posted.
    - Invoices should be printed.
    - Payroll and Billing must be exported to whatever external packages you use.
  - ☐ After migration is completed, call HomeTrak support for final migration configuration

**Note: If you have more than 400 active clients, add appropriate time to each stage in order for you to complete the work.

Recommended System Requirements

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Computer for Databases:

- Multi Core PC with 2.0 GHz or higher processor clock speed
- 4 GB of Ram or higher
- 20 GB minimum of available hard disk space
- CD-Rom or DVD drive
- 10/100/1000 Network Adapter
- Microsoft .NET Framework 3.5 SP1
- Some type of backup system

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Laptop:

- PC with 1.2 GHz or higher processor clock speed
- 2 GB of Ram or higher (4 GB recommended)
- 10 GB of available hard disk space
- CD-Rom or DVD drive
- Suggested screen resolution of 1600 x 900 (minimum 1024 x 600)
- 10/100/1000 Network Adapter
- Microsoft .NET Framework 3.5 SP1

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Workstation:

- PC with 1.2 GHz or higher processor clock speed
- 2 GB of Ram or higher (4 GB recommended)
- 10 GB of available hard disk space
- CD-Rom or DVD drive
- Screen resolution of 1920 x 1080
- 22 ” Monitor or larger is strongly recommended
- 10/100/1000 Network Adapter
- Microsoft .NET Framework 3.5 SP1

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Netbook:

- PC with 1.2 GHz or higher processor clock speed
- 2 GB of Ram or higher
- 10 GB of available hard disk space
- Minimum required resolution 1024 x 600
- 10/100/1000 Network Adapter
- Microsoft .NET Framework 3.5 SP1

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***Supported Operating Systems:**

- Windows 7 – Professional and Ultimate
- Windows Vista – Business and Ultimate
- Windows XP Professional
- Windows 2008 server – all editions
- Windows 2003 server – all editions

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All computers are required to have, or be connected to:

- Laser or DeskJet printer
- Sound card and speakers to hear training videos
- High Speed Internet access
- *Supported Operating System
- Microsoft .NET Framework 3.5 SP1

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Migration Project

Area	Action to Perform	Assigned To	Date Completed
Getting Started	Review this complete document.		
	Review and fix all Clients with bad data. Pages (8-11)		
	Review and fix all non-active Caregiver Status Dates. Page (12)		
	Compare recommended hardware to your hardware. Page (6)		
	Installing the Companion Database		
	Running the migration		
	Installing the Companion User on each workstation		
Webinars	Webinar 1 - Overview of Company Set Up, Agency Office and User Defined.		
	Webinar 2 - The Caregiver and Contact Modules.		
	Webinar 3 - The Client and Payer Modules.		
	Webinar 4 - Scheduling and Calendars.		
	Webinar 5 - Payroll and Billing.		
	Webinar 6 - Advanced Features of Companion: Grids, Reports and Dashboard.		
Day to Day Operations	Migration Items to Complete in Companion - People and Schedules (Pages 12-13)		
	Migration Items to Complete in Companion – Practice Payroll and Billing (Page 14)		
Reporting	Review 'Management Reports'		
	Review 'Reports Module' , 'Screen Reports' and 'Daily Review'		

PRE-MIGRATION DATA CLEAN-UP

You must complete a pre-migration data clean-up on your existing data within your current v7.1 software *before* running your Initial and Final Migrations. Download the program from the Migration to Companion webpage (Step 2) from the following link: http://www.hometrak.com/migration-2/welcome/

REVIEW and CORRECT ALL CLIENT NON-ACTIVE AUTHORIZATIONS

Review all **non-active** authorizations for all clients to be sure that the authorization "To Date" date field accurately represents the date when the authorization became *closed, suspended* or *deceased*. Non-active authorizations **CANNOT** have a "To Date" in the future, otherwise HomeTrak Companion will consider the authorization/client as *active* and migrate the record as such.

STEPS TO FIX INCORRECT AUTHORIZATIONS:

Open the Client Module.

1. In the "Limit Client by" section, select "Authorization Check" (second pull-down field).
2. At the bottom of the screen, click on the "Current Auths" button.
3. In the Authorize Information box, uncheck "Only Active" option. (If no client records appear, then all authorizations are correct.)
4. There are two options for correcting authorization dates:
   (Note: The dates shown in the graphics below are examples. You may use any date prior to today's date as your new "To Date.")

   Option 1: To change a single authorization: Edit each authorization and enter in the correct "To Date" and press **SAVE** at the top of the module.

   Option 2: To change all authorizations for a client to the same date: Enter the new date in the "Update All 'To Date' To" field and press **GO**.
   NOTE: Do not use this option on ACTIVE clients' authorizations. Use Option 1 for Active Clients.

   If authorizations are displayed that you do not want to update, change the "View Above" field to show only those authorizations that have a "To Date" after this. Tab off field to refresh information.

   Move to the next client in the list using the **NEXT** button at the top of the module. Repeat Step 4 until all clients are corrected.

REVIEW and CORRECT ALL INCORRECT CLIENT BIRTHDATES

STEPS TO FIX INCORRECT BIRTHDATES:

Open the Client Module.

1. In the "Limit Client by" section, select "Birthday Check" (second pull-down field).   (If no client records appear, then all client birth dates are correct.)
2. Correct the Client's birth date.   (Hint: Usually the year is incorrect.)
3. Press **SAVE** at the top of the module. 

4. Move to the next client in the list.
5. Repeat steps 2 - 4 until all clients are corrected.

REVIEW and CORRECT ALL CLIENT FIRST CONTACT DATES

If a client has a first contact date that is after the first day of service, the client will be migrated as *potential*, not *active*.

STEPS TO CORRECT FIRST CONTACT DATES:

Open the Client Module.

1. In the "Limit Client by" section, select "First Contact Check" (second pull-down menu).

   (If no client records appear, then all clients' First Contact Check dates are correct.)

2. At the bottom of the Required Information section, click on the "Referral" option.

3. Correct the "First Contact" date. This date must be before or the same as the "Start Date".

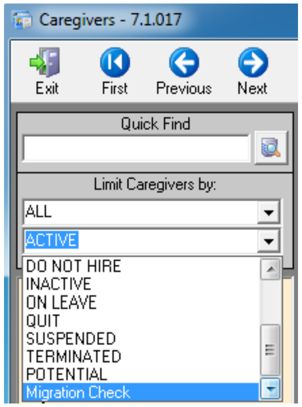
4. Press **SAVE** at the top of the module. 

5. Move to the next client in the list.

6. Repeat steps 3 - 5 until all clients are corrected.

REVIEW and CORRECT ALL NON-ACTIVE CAREGIVER STATUS DATES and INVALID BIRTHDATES

The "Status Date" date field must be the <u>same</u> as or <u>after</u> the "Hire Date" date, otherwise HomeTrak Companion will migrate the *non-active* caregiver as *active*.



<u>STEPS TO CORRECT NON-ACTIVE CAREGIVER STATUS DATES AND INVALID BIRTHDATES</u>:

Open the Caregiver Module.

1. In the "Limit Caregivers by" section, select the "Migration Check" (second pull-down field).

   (If no caregivers appear, then all non-active caregiver status dates and birthdates are correct.)

2. Review and correct the Status Date if invalid.

   a. Make sure the "Status Date" is the <u>same</u> as or <u>after</u> the "Hire Date".

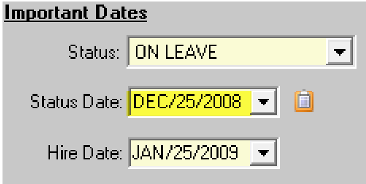
   b. For *potential* caregivers, the "Hire Date" should be blank.

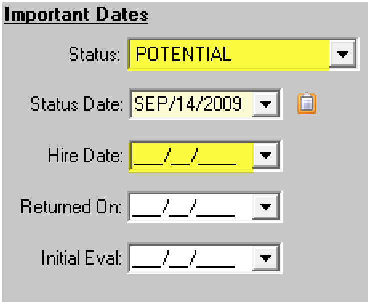
3. Review and correct the "Birthday" field if invalid.   (Hint: Usually the year is incorrect.)

4. Press **SAVE** at the top of the module.

5. Move to the next caregiver in the list.

6. Repeat steps 2 - 4 until all caregivers are corrected.





Migration Items to Complete in Companion - People and Schedules

Area	Action to Perform	Assigned To	Date Completed
Contact Manager Module	In 'Main Module' select 'Contact Manager' and Add a new contact		
	Complete the form as you see fit		
	Attach an Organization to the new contact		
Caregiver Module	In 'Main Module' select 'Caregiver' and Add a new Caregiver		
	Add Communication and Languages		
	Add Qualifications, Tasks to Perform, Payroll Options and Payroll Rates		
	Add a Documented Event		
	Review items under 'Attach Detail' tab. Practice adding and removing items from the different options		
	Add Emergency Contacts under 'Establish Relationships' tab		
	Add Referral Sources under 'Establish Relationships' tab		
Client Module	In 'Main Module' select 'Client' and Add a new Client		
	Attach a Referral Source if applicable		
	Choose another payer under 'Possible Payers'		
	Edit Billing Options		
	Add Billing Rates for the client		
	Create two authorizations. One for the client, and one for the other payer		
	Create a Care plan under 'Home' tab		

	Go to the 'Establish Relationships' tab and add items to each option. Once finished, press the view diagram button. This will display all the relationships you have created for this client		
Client Calendar	In 'Main Module' under 'Client Calendar' click on the new client you added above. Click on a day in the calendar, and right click to see dropdown menu. Add a new schedule. Try using 'Caregiver Suggestion' to find a caregiver		
	Edit schedule that was just added		
	Click on a day in the calendar, right click and select 'New Recurring Schedule'		
	Right click on the newly created recurring schedule, and choose 'Edit the Recurrence Master Record'. Make changes to the schedule, and save		
	Delete a schedule		
	Expand the 'Detail Panel'. Choose a schedule. Click through all the icons on the bottom of the detail panel to see all the information that is available on a schedule		
	Click on each button in the calendar toolbar. Some of them will change the way the schedule looks, others are for printing and emailing calendars		

Migration Items to Complete in Companion - Practice Payroll and Billing

Area	Action to Perform	Assigned To	Date Completed
Enter Actual Hours	In 'Main Module' select 'Actual Hours', choose a date range and press 'View'. If you wish to view for all caregivers, press the Multi-selection button ☐		
	Try each option on the toolbar. Travel time in Companion is calculated based on actual time it takes to go to the new schedule		
Finalize Schedules	In 'Main Module' select 'Finalize', choose a date range and press 'View'		
	Click on Run 'Finalize Check Schedules'. This will mark the schedules as being ready for payroll and billing		
Payroll Module	In 'Main Module' select 'Payroll', choose a date range and press 'View'		
	Click on Run 'Calculate Payroll'		
	When finished choose the 'View Calculated (Step 2)' tab. Run the reports and try different options		
	Click on Run 'Post Payroll'		
	When finished choose the 'View Posted tab'		
Billing Module	In 'Main Module' select 'Billing', choose a date range and press 'View'		
	Click on Run 'Calculate Billing'		
	When finished choose the 'View Calculated (Step 2)' tab. Run the reports and try different options		
	Click on Run 'Post Billing'		
	When finished choose the 'Invoices and QuickBooks (Last Step)' tab		
	Print out the invoices		
	When finished choose the 'View Posted' tab		

COMPLETING A MOCK BILLING/PAYROLL RUN

Before attempting a mock billing or payroll, please ensure that you are comfortable performing the daily steps of adding clients and caregivers, adding authorizations, scheduling, adding actual hours to a schedule, etc.

Generally, there should be no active Billing or active Payroll records. The only exception is the tail-end of overnight schedules that <u>begin</u> on the last date of your payroll or billing period.

The instructions below are for Billing. Follow the same steps for Payroll.

To start, confirm that you have already completely posted your <u>*last*</u> billing cycle in 7.1. This is your last posted billing date.
Now you need to prepare your <u>*current*</u> billing cycle in 7.1:

1. Confirm that all applicable schedules in this date range have actual hours, but are ***not finalized*** at this point.

   NOTE: Do you have overnight schedules that <u>begin</u> on the last day of your billing period? (For example, if your billing period ends on Saturday, do you have overnight schedules that begin on Saturday night and end on Sunday?) If **YES**, complete Step 2. If **NO**, skip to Step 3.

2. Open the Billing Module and go to the 'Calculate Billing' screen. Select the first day ***after*** your ***last*** posted billing date.
   Use this date as both your start date and end date. Click **CALCULATE**.
   You may get a warning that the selected ending date does not coincide with your company's week-ending day. This is OK; click **YES** and continue.
   This will pull in the tail-end of all the overnight schedules that <u>began</u> on the last date of your payroll or billing period. (You will only need to do this step while you are in migration. You will not need to do this step after you go live with Companion.)

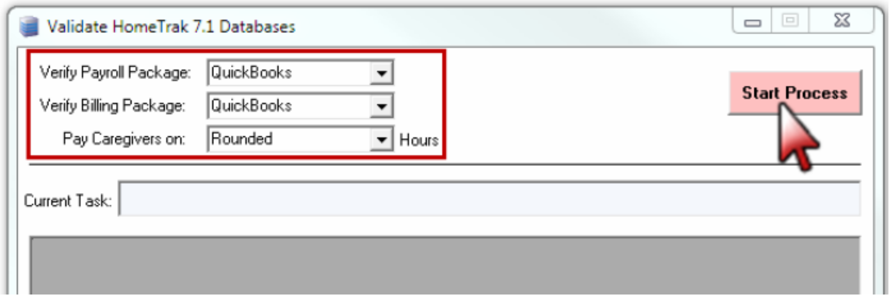
   NOTE: At this point, you may receive an error message "Possible Reasons for No Billing/Payroll" detailing errors regarding unfinalized schedules. If you believe you have done Steps 1 and 2 correctly, contact us at <u>migrationinfo@hometraksupport.com</u>.
   In your email, be sure to include:
   A) the date range of your last billing/payroll cycle;
   B) the date range of your current billing/payroll cycle that you are preparing;
   C) the date range you were calculating when you got this error.

3. If you are also processing payroll today, repeat Steps 1 and 2 in the Payroll Module. If Payroll is processed on a schedule different than Billing: When you process payroll, complete the above steps in the Payroll Module, using dates appropriate for your payroll period.
   <u>Continue to page 16 to complete the mock billing/payroll run</u>.

REMEMBER: Don't finalize your schedules in 7.1 until after you've started another migration!
Calculate in 7.1, THEN RUN MIGRATION, then go back and Finalize in 7.1

4. Go to the server and run another migration. (Click on the Initial Migration shortcut on the desktop.)
   Once you have successfully started the migration, you can complete billing and payroll in HomeTrak 7.1.

   NOTE: When you start the migration, change the information in the drop-down fields, if necessary:



5. When the migration completes, open Companion and finalize the schedules, and continue in the Billing and/or Payroll Modules.

   NOTE: Did you have overnight schedules that began on the last date of your billing period? If so, when you do a mock billing/payroll in Companion, you will not see the tail-end of these schedules until you get to the 'View Calculated' screen. (You must still calculate first.)

FOLLOW THESE STEPS TO COMPLETE BILLING IN COMPANION:

1. Go to the Billing Module. Under the tab "Calculate (Step 1)"click on "Run Calculate Billing" icon. Move to the tab "View Calculated (Step 2)". Click on the various reports in the ribbon to ensure all data is accurate before posting. Then click on "Run Post Billing" icon.
2. Generate invoices by moving to the "Invoices and QuickBooks (Last Step)" tab, click on "Print Standard Invoices" icon. When finished, move to the "View Posted" tab. Click on the various reports in the ribbon and successfully compare your results in Companion with your results from 7.1.

FOLLOW THESE STEPS TO COMPLETE PAYROLL IN COMPANION:

1. Go to the Payroll Module. Under the tab "Calculate (Step 1)"click on "Run Calculate Payroll" icon. Move to the tab "View Calculated (Step 2)". Click on the various reports in the ribbon to ensure all data is accurate before posting. Then click on "Run Post Payroll" icon.
2. When finished, move to the "View Posted" tab. Click on the various reports in the ribbon and successfully compare your results in Companion with your results from 7.1.

HomeTrak 7.1 version Companion Reports Comparison

7.1 Caregiver Reports	Module	Tab	Option
Active Assignments:	Printed Reports	Caregiver	Recurring Events
Client Incompatibility	Printed Reports	Client	Client Master (Caregiver Compatibility option)
Caregiver Flex Report	Screen Reports	Caregiver	Demographics
Documented Events	Printed Reports	Caregiver	Document Events
Inactivity Report	Printed Reports	Caregiver	Schedule Inactivity
Mailing Labels / Envelopes	Printed Reports	Caregiver	Envelopes or Address Labels
Master List	Printed Reports	Caregiver	Caregiver Master
Mileage and Expenses	Management Reports	Revenue Analysis	Expenses (Payroll Group)
Name Badges	Printed Reports	Caregiver	Name Badges
Required Dates	Printed Reports	Caregiver	Required Dates
Arrival Time Exceptions	Printed Reports	Caregiver	Early/Late Arrival Time (Under/Over Exceptions)
Hours Worked Exceptions	Printed Reports	Caregiver	Under & Over Exceptions
Time Sheets (schedules)	Printed Reports	Caregiver	Time Sheets By Date or Time Sheet by Client
Time Sheets (blank)	Printed Reports	Caregiver	Blank Time Sheets
Birthdays	Printed Reports	Caregiver	Birthdays

7.1 Client Reports	Module	Tab	Option
Active Assignments/Related Authorizations	Printed Reports	Client	Recurring Events
Authorizations that are going to expire	Printed Reports	Client	Expiring Authorizations
Client Flex Report	Screen Reports	Client	Demographics
Client Information	Printed Reports	Client	Client Master
Documented Events (Formally Logging)	Printed Reports	Client	Documented Events
Field Supervisor	Screen Reports	Client	Attached People
Mailing Labels / Envelopes	Printed Reports	Client	Envelopes or Address Labels
Master List	Printed Reports	Client	Client Master
Required Dates Coming Due	Printed Reports	Client	Required Dates
Upcoming Birthdays	Printed Reports	Client	Birthdays

7.1 Schedule Reports	Module	Tab	Option
Client Schedules	Printed Reports	Client	Weekly Schedules
Caregiver 1 -> 7 days	Printed Reports	Caregiver	Weekly Schedules
Caregiver Schedules (Condensed) *	Printed Reports	Caregiver	Weekly Schedules
Caregivers Under and Over Scheduled	Printed Reports	Caregiver	Under&Over Exceptions
Schedule Gap	Printed Reports	Caregiver	Schedule Gaps

7.1 Telephony Reports	Module	Tab	Option
Care Report			Not available
Completed Visits Report	Telephony Records	Completed E-Time Cards	Completed Visits
Length of Telephone Calls	Telephony Records	Completed E-Time Cards	View Data on Grid
Open Calls - Errors & Exceptions	Telephony Records	Open E-Time Cards	View Data on Grid
Telephony Instructions for a caregiver	Printed Reports	Caregiver	Instruction Cards

7.1 Referral Reports	Module	Tab	Option
Caregiver First Contact	Screen Reports	Caregiver	Status Flow
Caregiver Start of Service	Screen Reports	Caregiver	Status Flow
Client First Contact	Screen Reports	Client	Status Flow
Client Start of Service	Screen Reports	Client	Status Flow
Documented Events	Printed Reports	Contact	Documented Events
Master List	Printed Reports	Contact	Master List
Referral Flex Report	Screen Reports	Referrers	People Referred
Mailing Labels/Envelopes	Printed Reports	Contact	Address Labels or Envelopes

7.1 Management Reports	Module	Tab	Option
Caregiver Pay Rates	Screen Reports	Caregiver	Payroll Rates
Client/Payer Bill Rates	Screen Reports	Caregiver	Billing Rates
Projected Revenue	Management Reports	Projected Revenue	Projected Revenue tab
Mail Merge	Printed Reports	Choose Tab	Mail Merge
Sales Reports	Management Reports	Revenue Analysis	
Schedules and Billing Discrepancy	Management Reports	Schedule Analysis	All Schedules
To Do Items	Printed Reports	Office Staff	Tasks and Appointments
Under or Over Authorized Hours	Printed Reports	Client	Under & Over Authorized Hours

7.1 Statistics	Module	Options
Statistics	Management Reports	View All tabs and all options

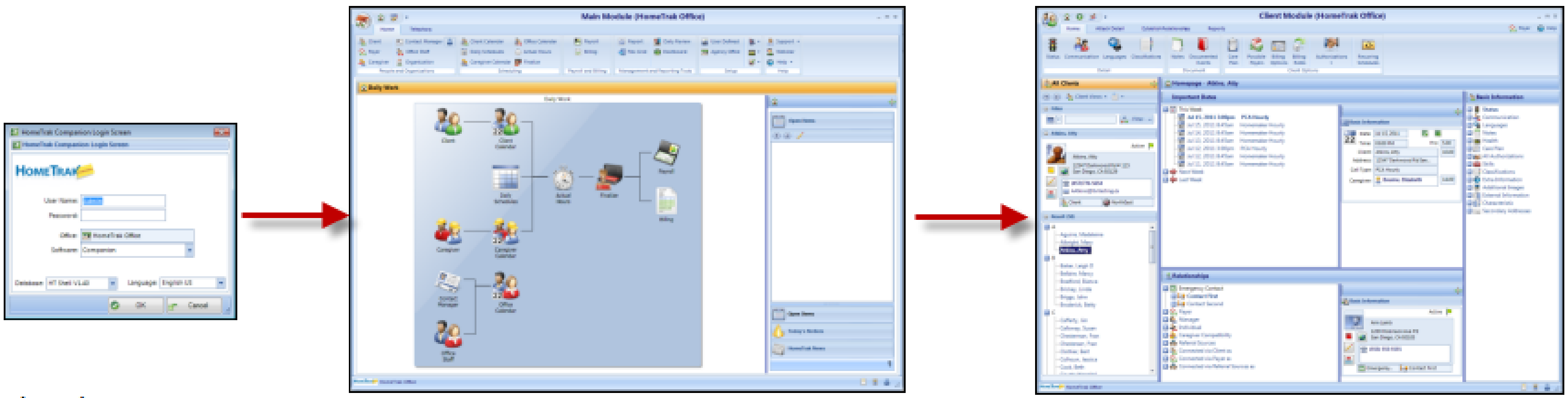
Important Information to Understand

An Important Note about Telephony: During the migration process, HomeTrak Companion *will not* have any Telephony capabilities. After final migration Telephony will be stopped on your HomeTrak 7.1 system and connected to your HomeTrak Companion.

Although you won't have access to Telephony in Companion during your initial migration, it is important to note that Completed ETimeCards are **not** migrated. Only the raw calls that were created prior to your migration will be available in Companion. This is not specific to initial migration. No completed ETimeCards, service or item history are migrated.

Introduction to Main Module

After logging into *HomeTrak Companion* you will be presented with the *Main Module*. The *Main Module* allows you to navigate the different areas of ***Companion***.



Login... Main Module... Module...

You can get to different areas of the software from the *Main Module* using either the tools in the ribbon or the flow diagram. Each area of the software has different information, functions and purposes that will prove to be useful in managing your company. The *Daily Work* flow diagram outlines the order in which areas of the software are often used. The *Implementation* flow diagram outlines a logical setup sequence for new users. Both flow diagrams allow for additional convenience when navigating through the system.

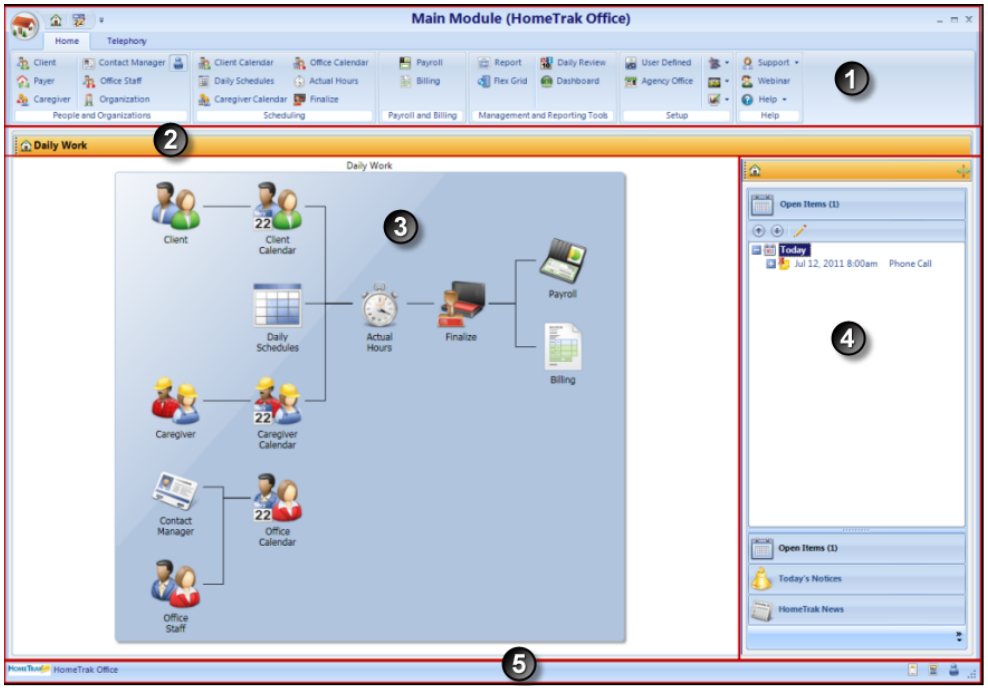
Daily Work Flow Diagram Button

Implementation Flow Diagram

Hotkeys - Keyboard Shortcuts

To Do This	Press
Spell Check	F7
Refresh Drop Down	F5
Add a new record	+ on key pad
Delete a selected record	- on key pad
Edit a selected record	* on key pad
Time Field - Add 1 hour	Up Arrow Key
Time Field - Minus 1 hour	Down Arrow Key
Duration Field - 24 hours	/ on key pad
Duration Field - 1 hour	* on key pad
Duration Field - Add 1 hour	Up Arrow Key
Duration Field - Minus 1 hour	Down Arrow Key
Duration Field - Add 15 minutes	Right Arrow Key
Duration Field - Minus 15 minutes	Left Arrow Key
Date Field - Add 1 (day, month or year)	Up Arrow Key
Date Field - Minus 1 (day, month or year)	Down Arrow Key

Touring the Workspace



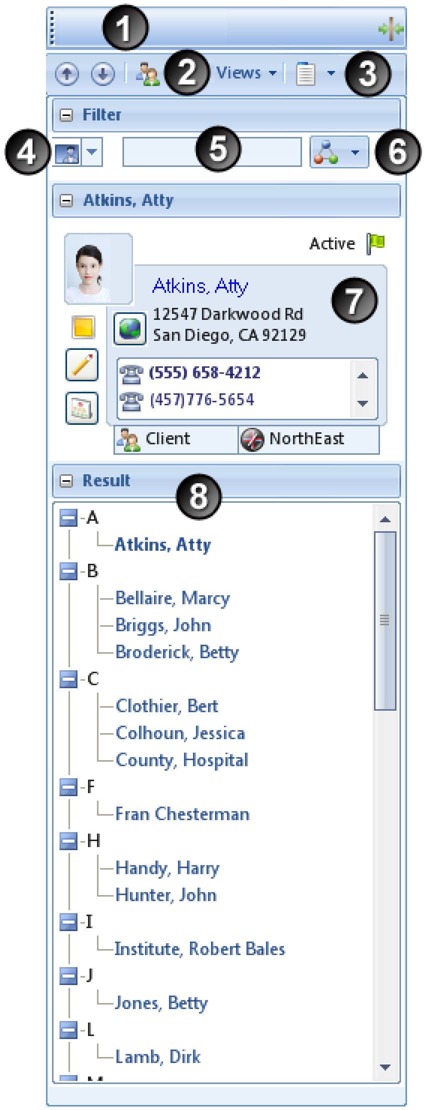
Number Location	Area
1	The *Ribbon Area* contains tools and options organized into logical groups and tabs. A tool can have a dropdown menu containing options allowing you to choose in greater detail where in the system you would like to navigate to.
2	The *Main Display Header* tells which flow diagram you are currently viewing in the *Main Display Portion* of the screen.
3	The Main Display Portion of the screen will contain either the *Daily Work* or the *Implementation* flow diagram. The *Implementation* flow diagram will only be used for new users/company's going through the setup process. The *Daily Work* diagram can be used on a continual basis after setup has been completed.
4	The *Open Items* panel contains user-specific tasks, appointments and schedules having and open status. The items are grouped according to whether they are scheduled for *Today, Coming Up* or in the *Past*. The panel also logs the notices you have received during the day and groups them according to whether they are *Open, Snoozed or Dismissed*. Items in the panel can be edited or viewed in greater detail simply by highlighting the item and pressing * on your keypad.
5	The *HomeTrak Taskbar* has icons in the far right corner that, when you hover your mouse over them, display user, office and company information.

Main Module Ribbon Area

Number Location	Ribbon Component
1	There are *Home*, *Telephony* and *Setup* tabs separating the tools found in the *Main Module Ribbon Area*. Click these tabs to view the tools found under them.
2	Groups are found along the bottom of the *Main Module* ribbon. They are sets of related tools and options.
3	Tools and options are arranged in groups. A tool can have a dropdown menu containing options allowing you to choose in greater detail where in the system you would like to navigate to.
4	The *HomeTrak* button menu contains many options, including the ability to take and restore system snapshots as well as import and export data.
5	The *Quick Access Menu* allows you to quickly return to the *Daily Work* flow diagram in the *Main Display Portion* of the *Main Module*.
6	The *Performance* dropdown menu contains a variety of options, including the ability to change the delay speed of the *Popup Detail* feature as well as choose your network speed.
7	The *Themes* dropdown menu allows you to change the overall look and color scheme of your system.

Generic Find Area Layout

The *Find Area* is used to search for the information you need. Tools and options within the *Find Area* allow you to navigate through the screen with ease.



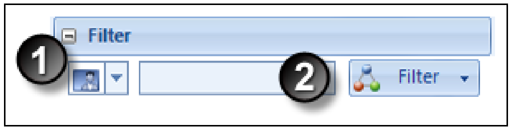
Number Location	Function
1	Shows the *Current View* selected. The view will affect the whole filtering process.
2	The *Views* feature allows you to select a group of people and organizations as a basis through which to continue filtering. Click the dropdown arrow to select a view. Only those that belong in the view you have chosen will be displayed in the *Result Section*.
3	The *Manage Items* menu contains a variety of tools and options allowing you to manipulate items in the *Result Section*.
4	Before filtering using the *Filter Box*, select the type of information being searched by (ie. Name, code, communication information (ex. Phone number, email address, etc.), or address) using this dropdown menu.
5	The *Filter Box* allows you to type in specific information you know about an individual or organization in order to find them.
6	Narrow down your search using the *Advanced Filter*, which allows you to select certain characteristics of people or organizations (i.e. certain statuses, categories, addresses, districts, and ranks). When you have selected the characteristics, only those having each of the characteristics selected will be displayed in the *Result Section*.
7	In the *Selected Result Section* you will see detailed information on the person or organization selected in the *Result Section*.
8	When you have finished filtering, you can use the data here, in the *Result Section*, in a variety of ways.

Manage Item Menu

Click the dropdown arrow of the *Manage Items* menu, pictured above, to view a menu containing tools and options allowing you to manipulate items in the *Result Section*.

Tool	Description
Reset	Returns the *Find Area* to its default settings
Expand All	Click to see all of the people and organizations listed under their groups in the *Result Section*.
Collapse All	Click to see only the group names listed in the *Result Section*. You can then choose to expand individual groups by clicking on the '+' to the left of the group name.
Group By Organization First Letter Category Status Home District Rank City State	Allows you to choose how you would like people and organizations arranged in the *Result Section*. The following options have great flexibility to meet the needs of your company (Not all *Find Areas* within the system have the same *Group By* options): -**First Letter** alphabetizes people by their last name. -**Category** is the most flexible of all the grouping options. Your company will pre-establish the categories for each module in *User Defined Information*, found under the *Main Module Setup* tab. -**Status** displays people and organizations in groups based on their status within the system. -**Home District** displays people and organizations in groups based on the district in which they reside. -**Rank** displays people and organizations in groups based on their rank within the system. You company will pre-establish its ranks in *User Defined Information*, found under the *Main Module Setup* tab. -**City** displays people and organizations in groups based on the city in which they reside. -**State** displays people and organizations in groups based on the state in which they reside.
Help	Opens a window containing all help items pertaining to the *Find Area*. The help items are categorized by type: *Movie*, *Tutorial*, or *Written*.

Find Area Filter Box



Number Location	Filter Component
1	Before filtering using the *Filter Box*, select the type of information to search by (ie. Name, Search (ex. Simultaneously search against name, city, street address, state, rank, organization and category), ID, Address, Communication Information (ex. Phone number, email address, etc.), or SSN.
2	The *Filter Box* allows you to type in specific information you know about an individual or organization in order to find them.

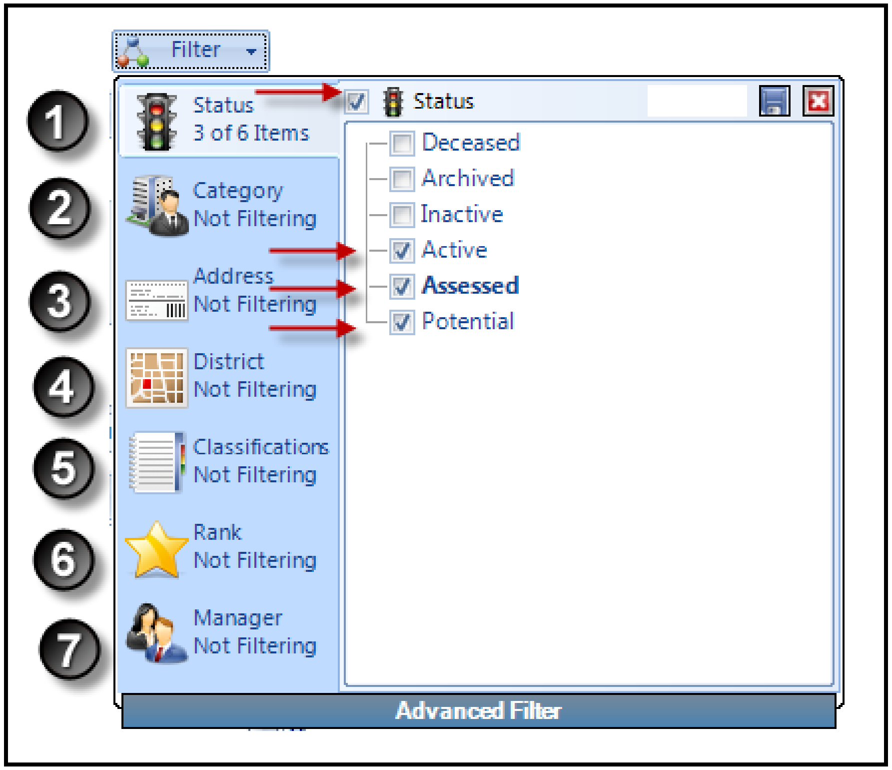
Following is an explanation of the types of information that can be selected from the dropdown and then entered into the *Filter Box*.

Type of Information	Description
Name	Any part of the first or last name of a person or organization can be entered into the *Filter Box*.
Search	Search against name, city, state, street address, rank, organization and category simulatneously for whatever information is entered in the *Filter Box*.
ID	IDs are assigned to people and organizations in *HomeTrak 7.1* and can be assigned in *HomeTrak Companion*. Any part of this ID can be entered into the *Filter Box* to identify a person or organization.
Address	Any part of a primary address can be entered into the *Filter Box* to identify a person or organization.
Communication	Any part of a phone number, cell number, fax number, pager number or email address can be entered into the *Filter Box* to identify a person or organization.
SSN	Any part of a Social Security Number can be entered into the *Filter Box* to identify a person.

Advanced Filter

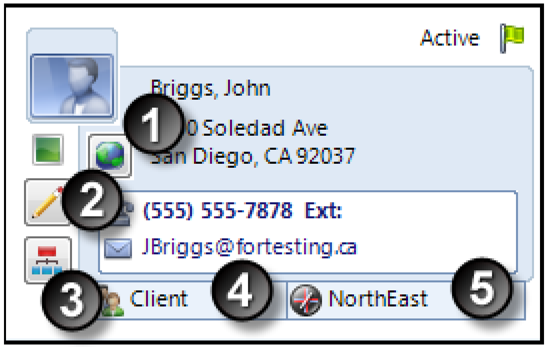
Each advanced filter element is able to narrow down your search according to a different criterion. Click a filter element, such as *Status* or *Rank*, in the column to view the related characteristics that are available to select from. In order to filter by a characteristic, both the filter element containing the characteristic and the characteristic itself must be selected. In the image below, for instance, the *Status* filter element and the *Active*, *Assessed* and *Potential* status characteristics are selected. If we were to deselect the *Status* filter element, the system would not filter by status, even if *Active*, *Assessed* and *Potential* were still selected.

If you select a filter element and would like to save that as your default when you are in a particular module, you can use the save button in the upper right of the filter window.



Number Location	Advanced Filter Element
1	You can choose who you would like to include in your filtering process by selecting the statuses of the people and organizations you would like to view in the *Result Section.*
2	You can choose who you would like to include in your filtering process by selecting the user-defined categories assigned to the people and organizations you would like to view in the *Result Section* .
3	You can choose who you would like to include in your filtering process by selecting the cities in which the primary address of the people and organizations you would like to view in the *Result Section* is located.
4	You can choose who you would like to include in your filtering process by selecting the user-defined districts in which the people and organizations you would like to view in the *Result Section* reside.
5	You can choose who you would like to include in your filtering process by selecting the user-defined Classifications that have been assigned to people and organizations you would like to view in the *Result Section.*
6	You can choose who you would like to include in your filtering process by selecting the user-defined ranks that have been assigned to the people and organizations you would like to view in the *Result Section.*
7	You can choose who you would like to include in your filtering process by selecting the managers of people and organizations you would like to view in the *Result Section* .

Select Result Section



Number Location	Function
1	The *View Map* tool will open a map focusing on the selected person or organization's primary address, which is the address displayed in the *Selected Result Section* .
2	The *Edit* tool allows you to change information on the person or organization selected.
3	The *Display Diagram* tool allows you to see the relationships had by the selected person or organization.
4	This display box shows the type of person or organization selected.
5	This display box shows the category assigned to the person or organization selected.

'How To' Diagrams

Where to Enter Different Types of People / Organizations

Where to Enter Different Types of People / Organizations

Client Module:
Clients can have relationships with:
- Emergency Contacts
- Individuals
- Referral Sources
- Managers
- Organizations
- Compatible/Incompatible Caregivers

Payer Module:
Enter Non-Private Payers (Third Party and Insurance Company/Medicaid)

Insurance and Medicaid Companies should already exist in the *Contact Manager Module* (Contacts for the company should be entered there and the company itself attached as an organization) so you will not need to enter all demographic information again when adding here.

After adding a non-private payer to the *Payer Module*, you will attach it in the *Client Module*, using the *Possible Payer* tool, to the client(s) they are paying for.

Organization Module:
Shows all organizations that have been added into the system.

Possible Organization Categories:
- Church
- Insurance Company
- Hospital
- Facility
- Doctor's Office
- Walk-in Clinic
- Government Agency
- Advertising
- Payer

Caregiver Module:
Caregivers can have relationships with:
- Emergency Contacts
- Individuals
- Referral Sources
- Managers
- Organizations

Contact Manager Module:
Enter Company Contacts, Referral Sources and Non-Private Payers

Possible Contact Categories:
- Referral
- Accountant
- Nurse
- Doctor
- Pastor/Minister/Clergy
- Friend
- Co-Worker
- Administrative Assistant

Contacts can have relationships with:
- Individuals
- Managers
- Organizations

Office Staff Module:
Possible Office Staff Categories:
- Office Manager
- Sales Person
- Owner
- Scheduler
- Human Resources
- Field Supervisor
- Case Manager

Office staff can have relationships with:
- Emergency Contacts
- Individuals

People Module:
Shows all people who have been added into the system.

- Clients
- Caregivers
- Contacts
- Office Staff
- Payers
- Emergency Contacts
- Individuals
- Managers
- Referral Sources

How to Progress from Adding a Client to Billing

How to Progress from Adding a Client to Billing

Step 1 - Add a New Client in the *Client Module*

Step 2 - Select/Add Possible Payers in the *Client Module*

Non-Private Payers should be added in the *Payer Module* first and then they can be selected as a possible payer for a client

Step 3 - Setup Billing Options in the *Client Module*

Step 4 - Setup Billing Rates in the *Client Module*
-General rates are setup in the Agency *Office Module.*
-Client-specific or payer-specific rates are setup in either the *Client Module or Payer Module*, respectively.

Step 5 - Add an Authorization in the Client Module

Step 6 - Add a Schedule in the Schedule Module (Daily Schedules, Client or Caregiver Calendars

Step 7- Enter Actual Schedule Information
-Enter for Multiple schedules at a time, either using the tool to manually enter the actual hours or automatically filling in the actual hours worked with what was scheduled, in the *Enter Actual Information* screen.
-Enter for individual schedules in the Client Calendar or the Daily Schedules screen.

Step 8- Finalize Schedules

Step 9 - Calculate Billing

Step 10 - Run Billing Reports
-Ensure all data is accurate before posting

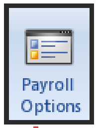
Step 11 - Post Billing

Step 12- Generate Invoices

How to Progress from Adding a Caregiver to Payroll

Step 1 - Add a New Caregiver in the *Caregiver Module*

Step 2 - Setup Payroll Options in the *Caregiver Module*



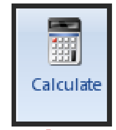
Step 3 - Setup Payroll Rates
-General rates are setup in the *Agency Office Module*.
-Caregiver-specific rates are setup in the *Caregiver Module*.

Step 4 - Add a Schedule in the *Schedule Module*

Step 5 - Enter Actual Schedule Information
-Enter for individual schedules in the *Caregiver Calendar* or the *Daily Schedules* screen.
-Enter for multiple schedules at a time, either manually or automatically filling in with scheduled information, in the *Enter Actual Information* screen.

Step 6 - Finalize Schedules

Step 7 - Calculate Payroll



Step 8 - Run Payroll Reports
-Ensure all data is accurate before posting.

Step 9 - Post Payroll