HomeTrak
Your expert companions in home care software

Clients, Caregivers and Office Staff

Table of Contents

HomeTrak Terms of Reference

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

- ***Call Types*** (Services) are items you bill or pay for. i.e. *Homemaker*, *Personal Care*

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

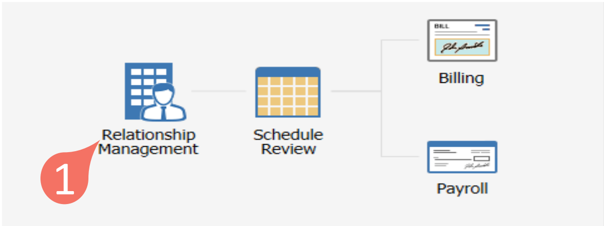
- ***Required Dates*** are also known as Certification Dates and are used for tracking items required for Clients and Caregivers. i.e. Professional License (Caregiver), Quarterly Reassessment Visit (Client)

- ***Documented Events*** are any type of event you need to record and on and can play two roles:

  1. Documenting significant events (good or bad) involving Clients and/or Caregivers
  2. Used to document the minutes of a meeting or conversation with referral sources

Relationship Management

A central area of the software to add in and maintain profiles



How Do I Add Someone New to Companion?

1. From the Main Module, click on **Relationship Management**

2. Once opened, click on the appropriate module at the top for the type of person you want to add.

Example: *clicking Office Staff will bring you to the area to add or maintain office staff records*

Office Staff Setup

✓ **Demographics**:
- First & Last Name,
- **Active** or **Hire Date** Status and Start Date
- Email Address

✓ **Creating an Identity Account**

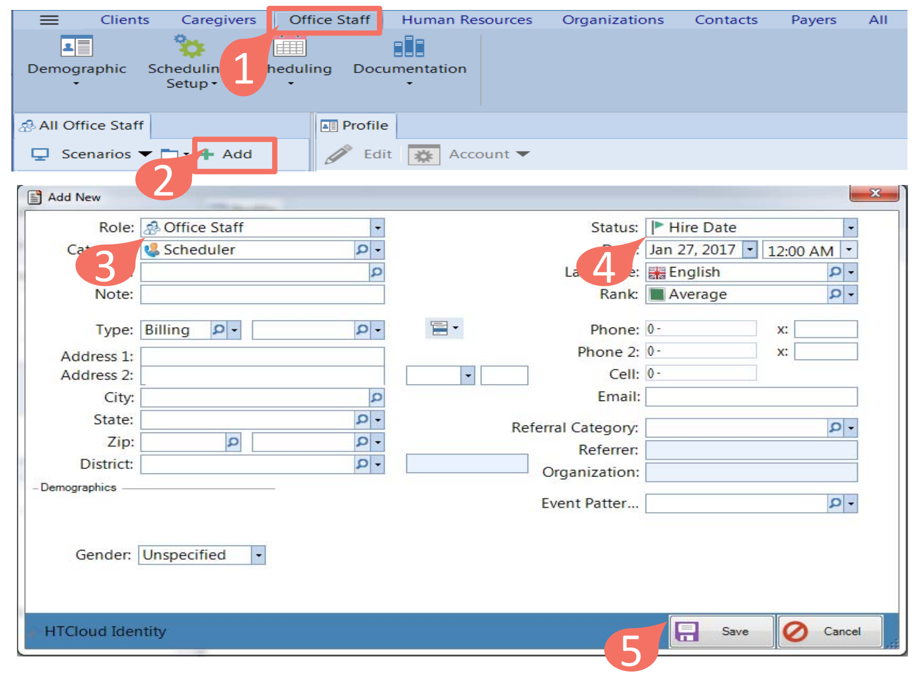
✓ **Downloading HomeTrak Mobile** (Android or IPhone/Apple/IOS)

Adding New Office Staff

What information do I need to create a new Office Staff profile?

How Do I Add an Office Staff Person?

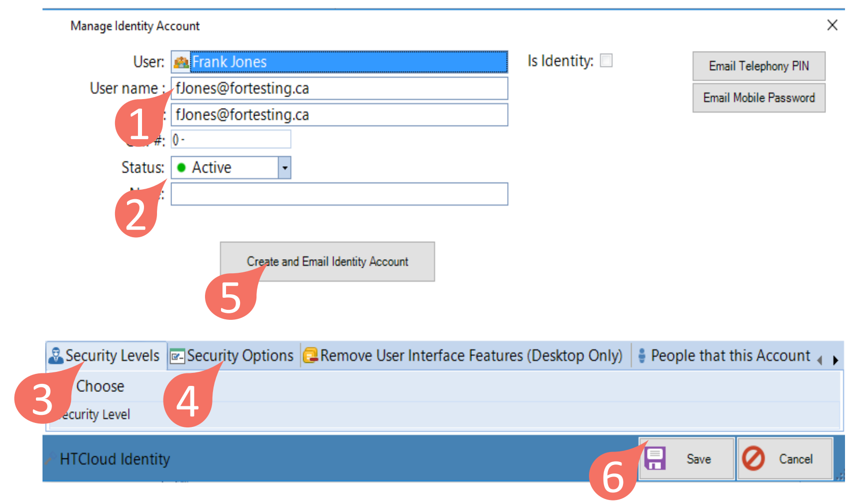
1. Click on ***Office Staff*** in Relationship Management
2. Click on the **Add** button and the 'Add New' screen opens
3. Type in the First & Last Name of the new Office Staff
4. Add **Hire Date** Status and Date (First Day of Employment)
5. Enter in their Email Address (for logging into HomeTrak)
6. Click **Save** and the *Manage Users Account (Identity)* screen will open (**See Next Slide**)

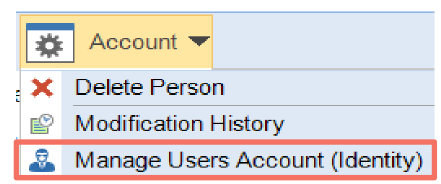


Manage Users Account (Identity)

Getting My Office Staff Set Up to Log In

1. **User Name** and **Email** will prefill with the 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+ characters)
6. Click **Save** to exit out of this screen





Account → Profile → Manage Users Account (Identity)

Activating Your Identity Account

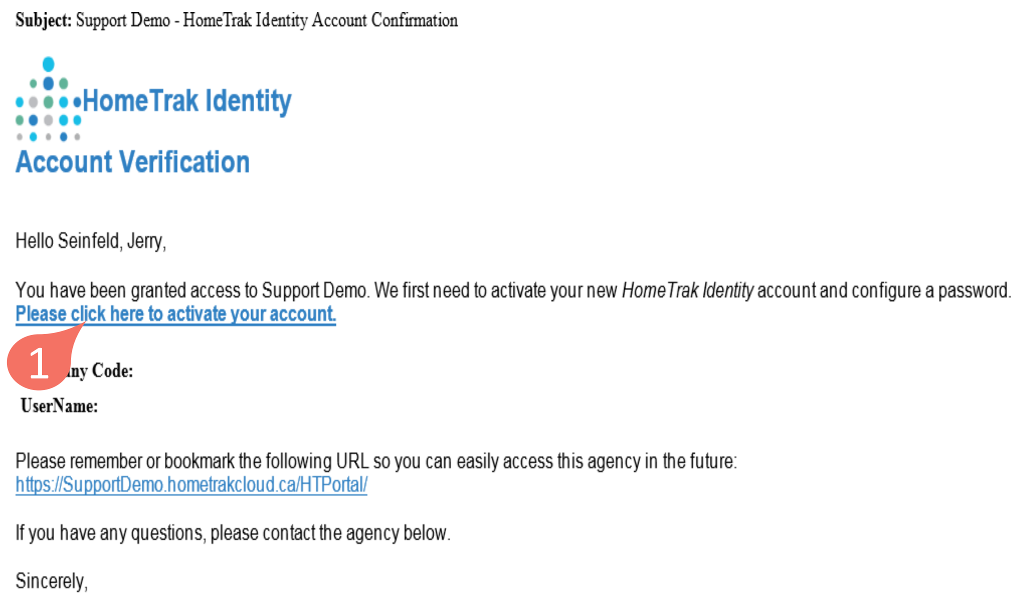
NOTE: Email will come from **HOMETRAK IDENTITY**. You may have to check your junk folder if it's not showing in your inbox!

Once the Email is Received

1. Click ***Please Click Here to Activate Your Account***.
   This will bring you to a webpage to create a password

2. Once created and confirmed, click ***Change Password***.

You will now be able to log in to HomeTrak using your email address.



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.

1

ny 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.

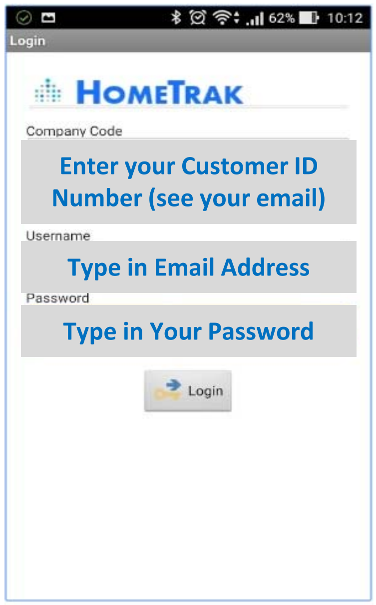
Sincerely,

Downloading HomeTrak Mobile

A convenient way to access your information while on the road!

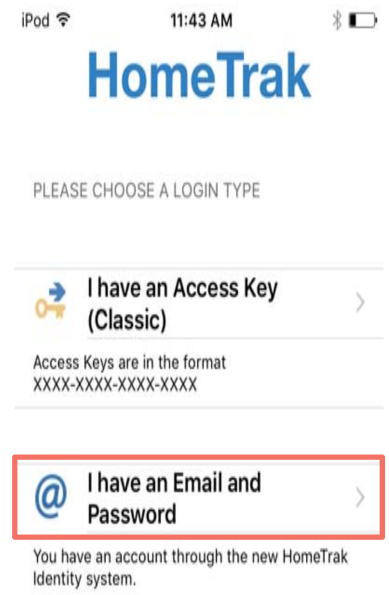
Search: **HOMETRAK MOBILE**
Click: **INSTALL**
Once Installed: **OPEN**

[**Android Features**]()



Search: **HOMETRAK MOBILE**
Click: **INSTALL**
Once Installed: **OPEN**

[**IOS Features**]()



Click Here for a tour of HomeTrak Mobile!

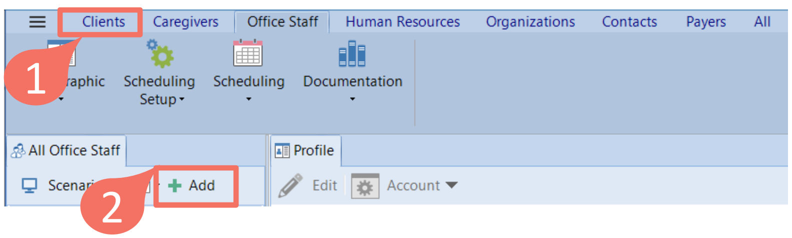
Client Setup

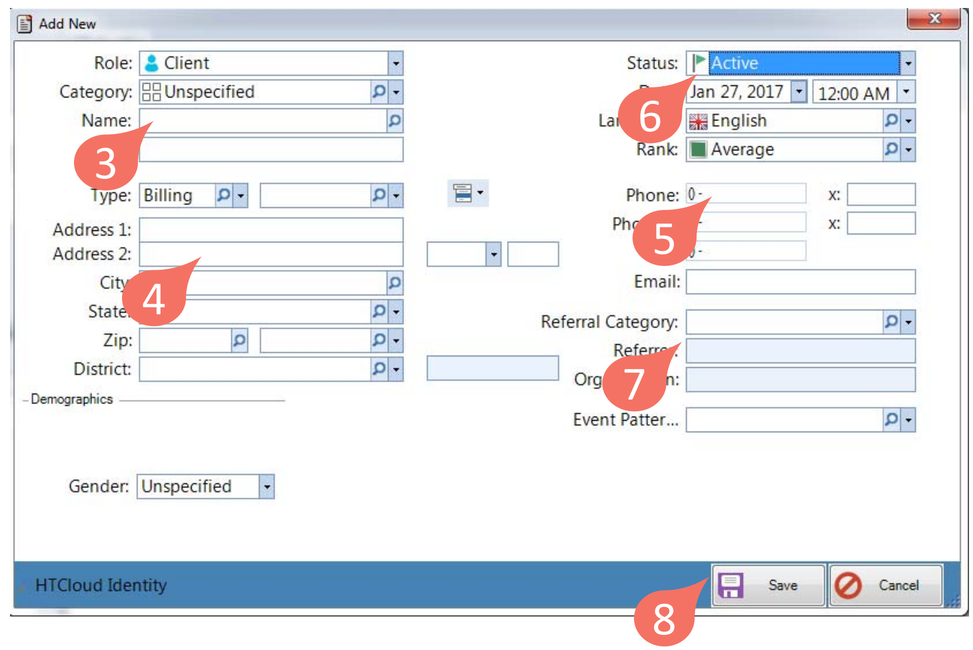
- ✓ **Profile**
  - **Name**
  - **Address**
  - **Active Status and Start Date**
  - **Phone Number**
- ✓ **Relationships (Emergency Contacts)**
- ✓ **Authorization for Services**
- ✓ **Billing Options**

Main Module → Relationship Management → Client

Adding a New Client

What information will I need to add a new Client to Companion?





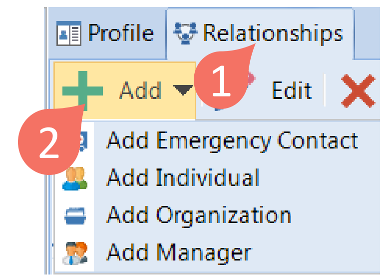
1. Click on **Clients**
2. Click on **Add** button to open the '*Add New*' screen
3. Enter in Client's First & Last Name
4. Enter in Client's Address
5. Enter in Client's Phone Number
6. Add **Active** Status and Date (First Day of Services)
7. Optional – Enter in Referral Information
8. Click **<u>Save</u>**

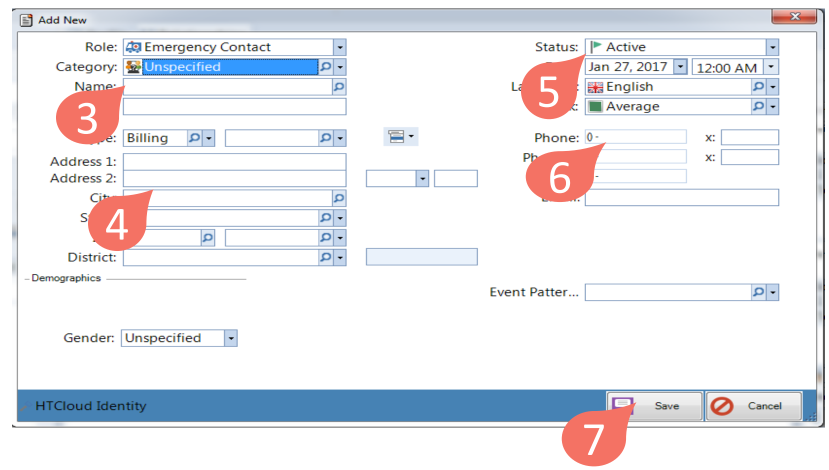
Main Module → Relationship Management → Client

Adding a Relationship to a Client

Linking an Emergency Contact, Individual, Organization or Manager to a Client's Profile

1. Click on ***Relationships***.
2. Click on **Add** to generate a dropdown options list. Click on the type of person (or Organization) you want to link to the Client. This will open the *Add New* screen
3. Enter in the Name of the Person (or company if an Organization)
4. Optional – Enter in Address
5. Choose **Active** status and indicate their status date
6. Enter in their contact Phone Number and/or Email
7. Click **Save** and the newly added contact is linked to the Client



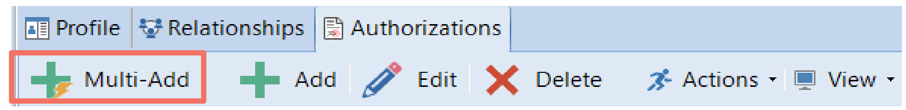


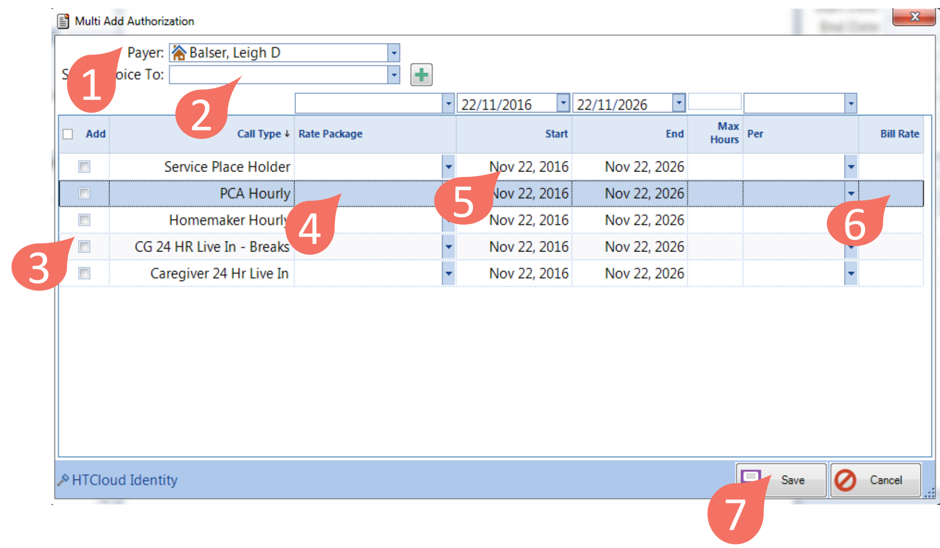
Click **Here** for a description of the Relationships you can link to a Client!

Creating an Authorization

An Authorization is the permission to provide care and is required in order to schedule your Clients

1. Select the **Payer** (Client is the default Payer).
   If invoicing someone else, click on the dropdown arrow to select the appropriate Payer *i.e. Medicaid, Insurance Companies, etc.*
2. **Send Invoice To** – if you're mailing the bill to one of the Client's Relationships, click on dropdown arrow and select. Their address will show on the invoice
3. Check off which **Call Type(s)** service(s) are being provided
4. Select the **Rate Package** (how you are billing the Client)
   i.e. Hourly, 24 Hour Live In, Per Visit, etc.
5. Select Authorization **Start** date (First Day of Services)
6. Enter in **Bill Rate** for the service(s)
7. Click **Save**

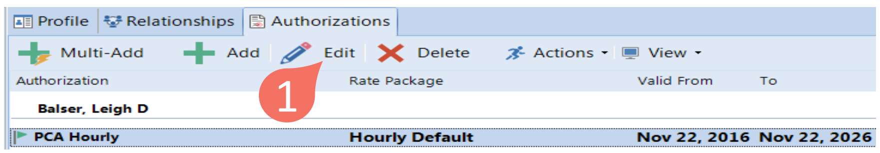


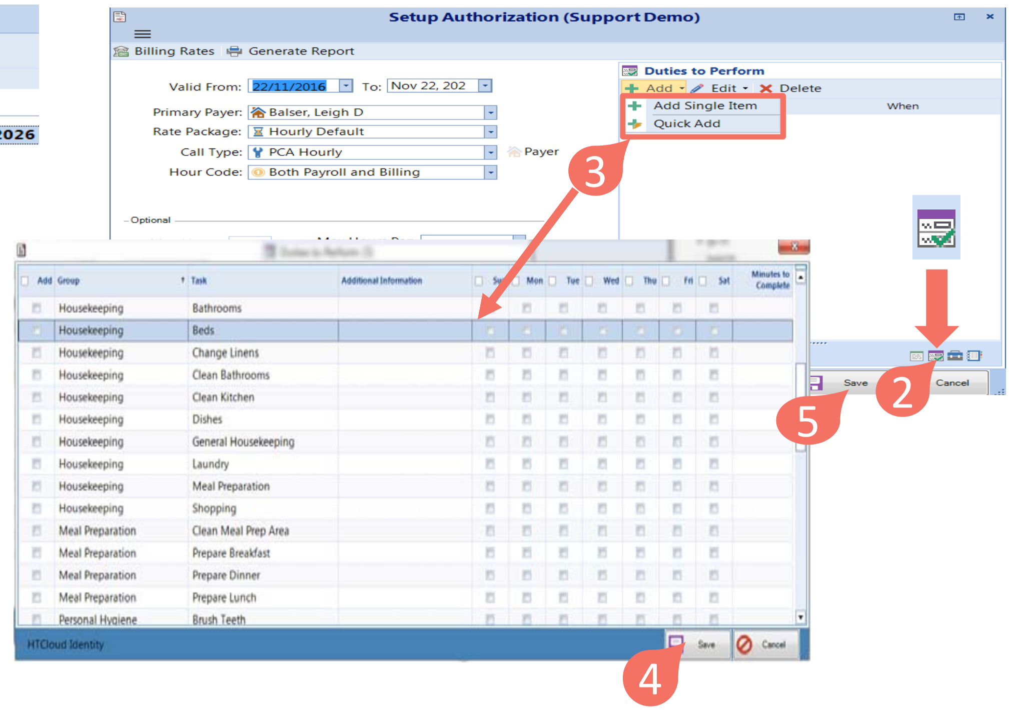


Client → **Scheduling Setup** → **Authorization** → **Multi-Add/Quick Add**

Assigning Duties to Perform to an Authorization

What services do my Caregivers need to do when visiting a Client?



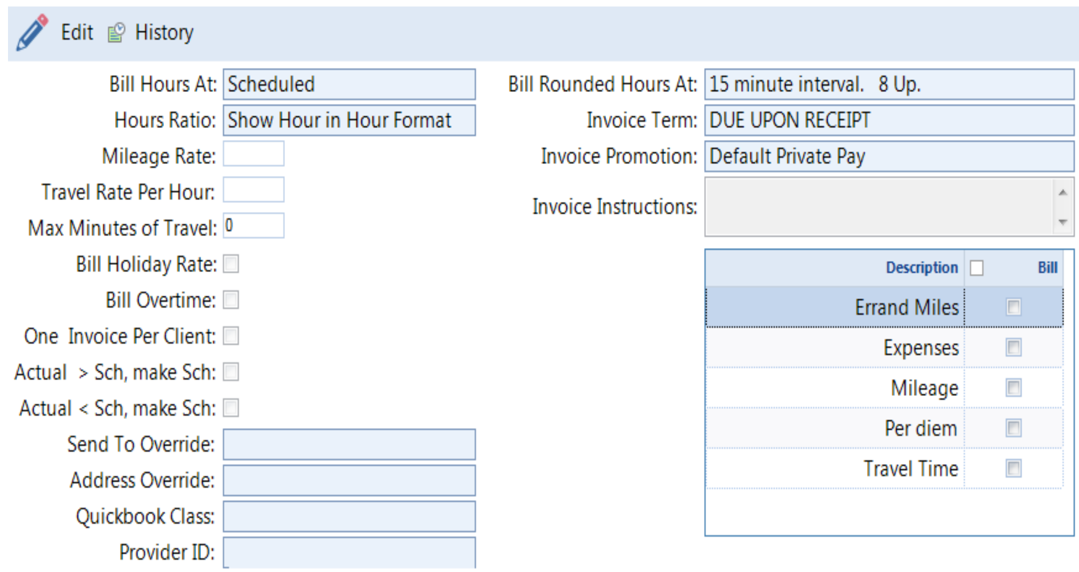


1. Highlight the Authorization you set up and click **Edit**
2. Once the Setup Authorization screen opens, click on the ***Duties to Perform*** icon ( ) to access that section
3. Click on the **Add** and then ***Quick Add*** to open the list of duties. Check off each task to be performed for your Client. If the task is to be completed '*As Needed*', place a checkmark in the box to the left of the task category
4. Once completed, click **Save**
5. Click **Save** again to update the Authorization

Billing Options

Billing Options can be individualized for each Client. If applicable to most Clients, a default can be pre-established in the Agency Office module.

1. **Bill Hours At**: *Actual, Rounded or Scheduled*
2. **Mileage Rate** (***Optional***): Enter in how much per mile you would bill for the Caregiver's travel to see the Client
3. **Travel Rate Per Hour *(Optional*)**: Enter in the hourly rate of travel you bill the Client
4. **Bill Holiday Rate** (***Optional***): Check off this box if you bill the Client for holiday coverage
5. **Bill Overtime** (***Optional***): Check off this box if you bill the Client overtime
6. **Expenses** (***Optional***): Check which billable expenses can be applied to the Client
   Errand Miles, Expenses, Mileage, Per Diem, Travel Time

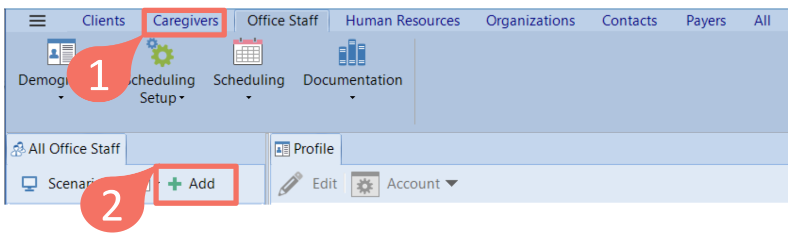


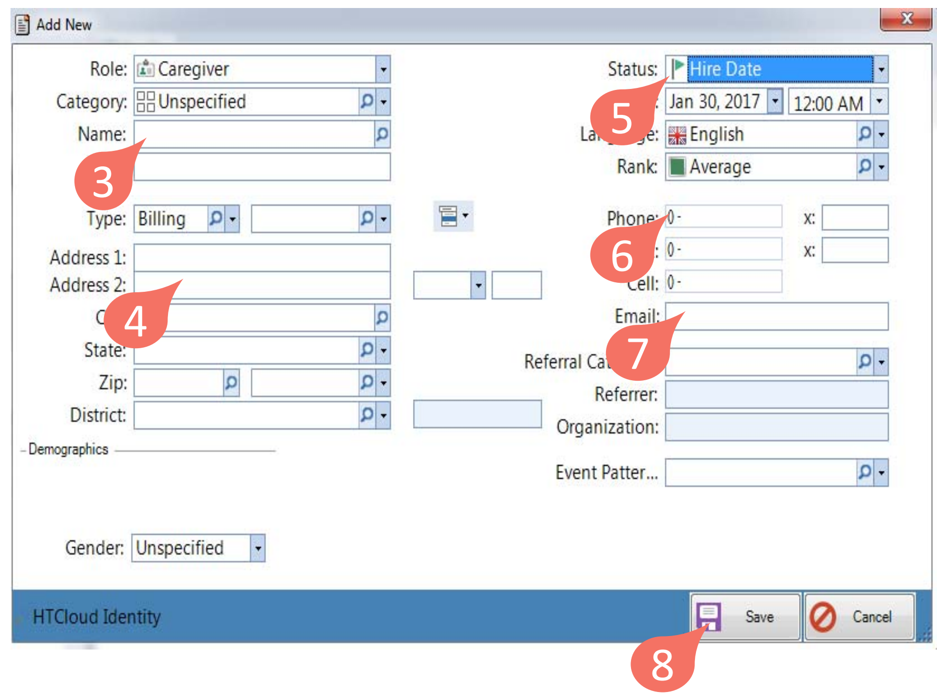
Caregiver Setup

- ✓ Profile:
  - Name
  - Address
  - Phone Number
  - **Hire Date** Status and Start Date
  - Email Address
- ✓ Payroll Rate(s) and Options

Adding a New Caregiver

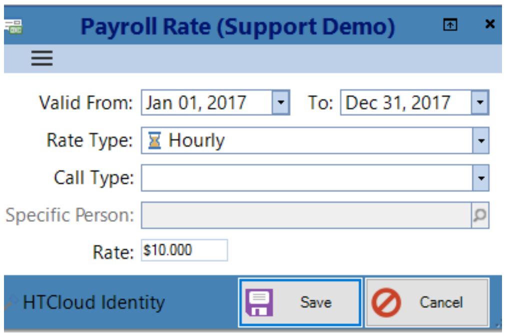
What information will I need to add a new Caregiver to Companion?





1. Click on **Caregivers**
2. Click on the **Add** button to open the '*Add New*' screen
3. Enter in the Caregiver's First & Last Name
4. Enter in the Caregiver's Address
5. Add **Hire Date** status and **Date** (First Day of Work)
6. Enter in the Caregiver's Phone Number
7. Enter in the Caregiver's Email Address
8. Click **Save**

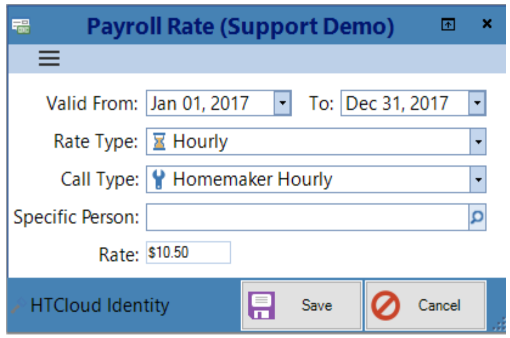
Payroll Rates



RATE TYPE SPECIFIC

The Caregiver gets paid the same wage for all schedules fulfilled.

1. Select **Hourly** Rate Type
2. In the **Rate** field, type in their Hourly rate
3. Click **Save**

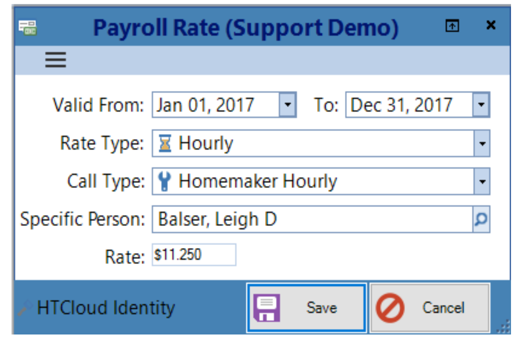


CALL TYPE SPECIFIC

The Caregiver gets paid multiple rates based on service provided.

1. Select **Hourly** Rate Type
2. Select **Call Type**
3. In the **Rate** field**,** type in their rate of pay for this service
4. Click **Save**

Add in all the Call Type-specific rates for the Caregiver to ensure payroll accuracy



CLIENT SPECIFIC

The Caregiver earns a different rate working with a specific Client.

1. Select **Hourly** Rate Type
2. Select **Call Type**
3. Search for and add in Client's name in **Specific Person**
4. In the **Rate** field, input rate of pay when Caregiver works with that client
5. Click **Save**