



Clients, Caregivers and Office Staff

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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 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

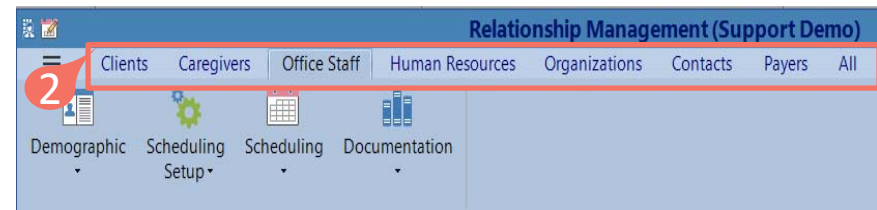
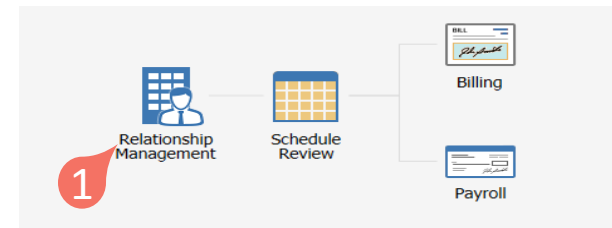
Relationship Management

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



Main Module → Relationship Management

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)

Main Module → Relationship Management → Office Staff

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)

The screenshot shows the 'Add New' form for an Office Staff member. The form is divided into several sections:

- Role:** Office Staff (selected)
- Category:** Scheduler (selected)
- Note:** (empty text field)
- Type:** Billing (selected)
- Address 1:** (empty text field)
- Address 2:** (empty text field)
- City:** (empty text field)
- State:** (empty dropdown menu)
- Zip:** (empty text field)
- District:** (empty dropdown menu)
- Demographics:** (empty section)
- Gender:** Unspecified (selected)
- Status:** Hire Date (selected)
- Start Date:** Jan 27, 2017 (selected)
- Start Time:** 12:00 AM (selected)
- Language:** English (selected)
- Rank:** Average (selected)
- Phone 0:** (empty text field)
- Phone 1:** (empty text field)
- Phone 2:** (empty text field)
- Cell:** (empty text field)
- Email:** (empty text field)
- Referral Category:** (empty dropdown menu)
- Referrer:** (empty dropdown menu)
- Organization:** (empty dropdown menu)
- Event Patter...:** (empty dropdown menu)

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red callout 5.

Main Module → Relationship Management → Office Staff

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

The screenshot shows the 'Manage Identity Account' window. It contains the following elements:

- User:** Frank Jones
- User name:** fJones@fortesting.ca
- Is Identity:**
- Email Telephony PIN:** [Input field]
- Email Mobile Password:** [Input field]
- Status:** Active
- Create and Email Identity Account:** [Button]
- Security Levels:** [Dropdown menu]
- Security Options:** [Checkmark icon]
- Remove User Interface Features (Desktop Only):** [Checkmark icon]
- People that this Account:** [Dropdown menu]
- HTCloud Identity:** [Text]
- Save:** [Button]
- Cancel:** [Button]

Numbered callouts (1-6) are placed over the interface to highlight specific steps:

- 1: Points to the 'User name' field.
- 2: Points to the 'Status' dropdown menu.
- 3: Points to the 'Security Levels' dropdown menu.
- 4: Points to the 'Security Options' checkmark.
- 5: Points to the 'Create and Email Identity Account' button.
- 6: Points to the 'Save' button.

Below the main window, a menu is shown with the following items:

- Account
- Delete Person
- Modification History
- Manage Users Account (Identity)

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



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 any 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,

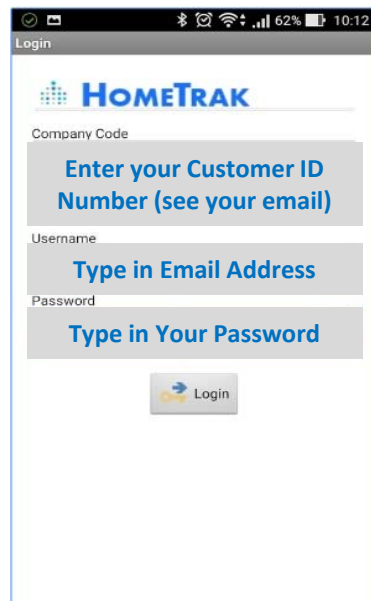
Downloading HomeTrak Mobile

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



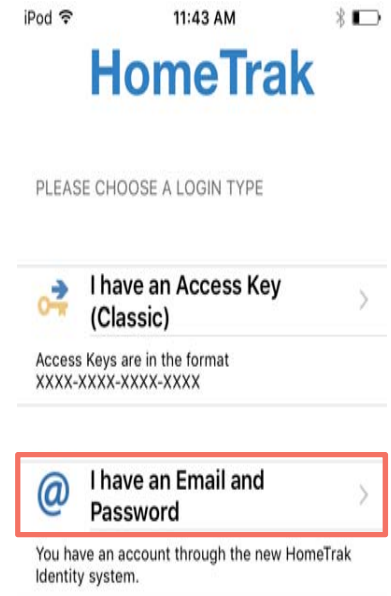
Search: **HOMETRAK MOBILE**
Click: **INSTALL**
Once Installed: **OPEN**

[Android Features](#)



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

[IOS Features](#)



Click [Here](#) for a tour of HomeTrak Mobile!

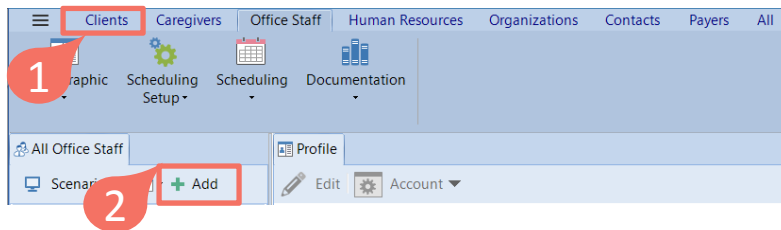
Client Setup

- ✓ **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 **Save**

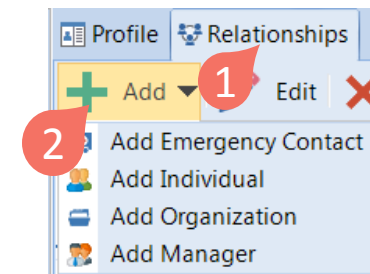
A screenshot of the 'Add New' form for a client. The form is titled 'Add New' and contains various fields for client information. Red circles with numbers 3 through 8 point to specific fields: 3 points to the 'Name' field, 4 points to the 'Address 1' field, 5 points to the 'Phone' field, 6 points to the 'Status' dropdown menu, 7 points to the 'Referral Category' field, and 8 points to the 'Save' button at the bottom right.

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

A screenshot of the 'Add New' form. The form contains various fields for adding a new relationship. A red circle with the number '3' points to the 'Name' field. A red circle with the number '4' points to the 'City' field. A red circle with the number '5' points to the 'Status' dropdown menu, which is set to 'Active'. A red circle with the number '6' points to the 'Phone' field. A red circle with the number '7' points to the 'Save' button at the bottom right of the form.

Click [Here](#) for a description of the Relationships you can link to a Client!

Clients tab → Demographics → Relationships

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**

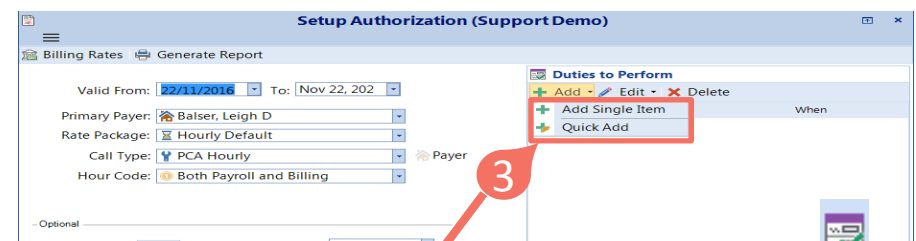
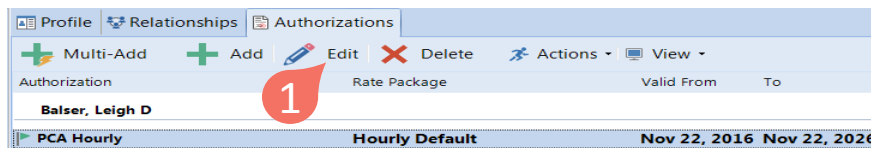
The screenshot shows the 'Multi Add Authorization' form. At the top, there are tabs for 'Profile', 'Relationships', and 'Authorizations'. Below the tabs is a toolbar with buttons: '+ Multi-Add' (highlighted with a red box), '+ Add', 'Edit', 'Delete', 'Actions', and 'View'. The main form area has a 'Payer' dropdown set to 'Balsler, Leigh D' and a 'Send Invoice To' dropdown. Below these are date pickers for 'Start' (22/11/2016) and 'End' (22/11/2026). A table lists services with columns for 'Add', 'Call Type', 'Rate Package', 'Start', 'End', 'Max Hours', 'Per', and 'Bill Rate'. The 'PCA Hourly' row is selected. At the bottom right, there are 'Save' and 'Cancel' buttons.


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 checked="" 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			

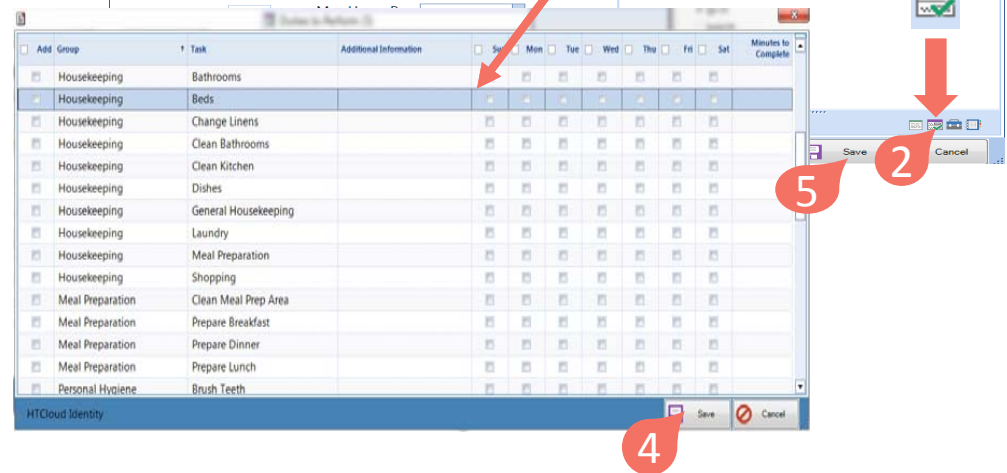
Client → Scheduling Setup → Authorization → Multi-Add/Quick Add

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



Client → Scheduling Setup → Authorizations

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

Edit
 History

<p>Bill Hours At: <input type="text" value="Scheduled"/></p> <p>Hours Ratio: <input type="text" value="Show Hour in Hour Format"/></p> <p>Mileage Rate: <input type="text"/></p> <p>Travel Rate Per Hour: <input type="text"/></p> <p>Max Minutes of Travel: <input type="text" value="0"/></p> <p>Bill Holiday Rate: <input type="checkbox"/></p> <p>Bill Overtime: <input type="checkbox"/></p> <p>One Invoice Per Client: <input type="checkbox"/></p> <p>Actual > Sch, make Sch: <input type="checkbox"/></p> <p>Actual < Sch, make Sch: <input type="checkbox"/></p> <p>Send To Override: <input type="text"/></p> <p>Address Override: <input type="text"/></p> <p>Quickbook Class: <input type="text"/></p> <p>Provider ID: <input type="text"/></p>	<p>Bill Rounded Hours At: <input type="text" value="15 minute interval. 8 Up."/></p> <p>Invoice Term: <input type="text" value="DUE UPON RECEIPT"/></p> <p>Invoice Promotion: <input type="text" value="Default Private Pay"/></p> <p>Invoice Instructions: <input type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">Description</th> <th style="text-align: center;">Bill</th> </tr> </thead> <tbody> <tr> <td>Errand Miles</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td>Expenses</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Mileage</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Per diem</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> <tr> <td>Travel Time</td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>	Description	Bill	Errand Miles	<input checked="" type="checkbox"/>	Expenses	<input type="checkbox"/>	Mileage	<input type="checkbox"/>	Per diem	<input type="checkbox"/>	Travel Time	<input type="checkbox"/>
Description	Bill												
Errand Miles	<input checked="" type="checkbox"/>												
Expenses	<input type="checkbox"/>												
Mileage	<input type="checkbox"/>												
Per diem	<input type="checkbox"/>												
Travel Time	<input type="checkbox"/>												

Client → Scheduling Setup → Billing Options

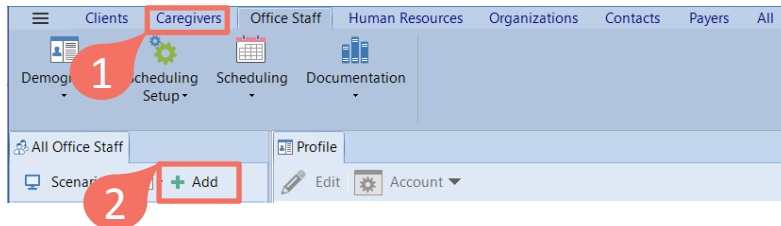
Caregiver Setup

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

Main Module → Relationship Management → Caregiver

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**

Main Module → Relationship Management → Client

Payroll Rates

The screenshot shows the 'Payroll Rate (Support Demo)' form with the following fields: Valid From: Jan 01, 2017, To: Dec 31, 2017, Rate Type: Hourly, Call Type: (empty), Specific Person: (empty), and Rate: \$10.000. The Save button is highlighted.

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**

The screenshot shows the 'Payroll Rate (Support Demo)' form with the following fields: Valid From: Jan 01, 2017, To: Dec 31, 2017, Rate Type: Hourly, Call Type: Homemaker Hourly, Specific Person: (empty), and Rate: \$10.50. The Save button is highlighted.

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

The screenshot shows the 'Payroll Rate (Support Demo)' form with the following fields: Valid From: Jan 01, 2017, To: Dec 31, 2017, Rate Type: Hourly, Call Type: Homemaker Hourly, Specific Person: Balsler, Leigh D, and Rate: \$11.250. The Save button is highlighted.

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**

Caregiver → Scheduling Setup → Payroll Rates → Add