



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

CAREGIVER AND CLIENT INTAKE CUSTOM FORMS

VERSION 6.3

Learn how to use Companion's custom forms for your online web client intake and caregiver applications.

Pre-Requisites:

- In order to receive the contents of the client intake or caregiver application submitted, you need to be on the cloud.
- You must have access to User Defined and Agency Office to create your questions and configure your web forms for client intake and caregiver application.
- You must have access to the Client Inquiries or Human Resource module to manage submitted web forms for your clients and caregivers.

The following process applies for both the **Client Web Intake** and the **Caregiver Application forms**. This manual is presenting the Caregiver Application process.

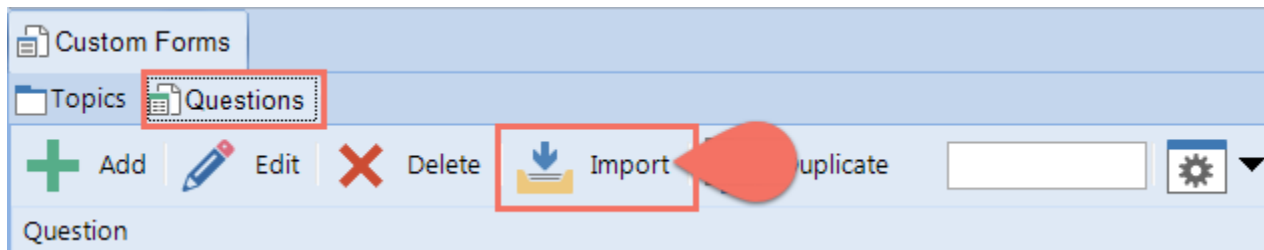
How to create the topics and questions that appear on the caregiver application:

From the *Main* screen click on *Setup* in the top right-hand corner, then click **User Defined**.

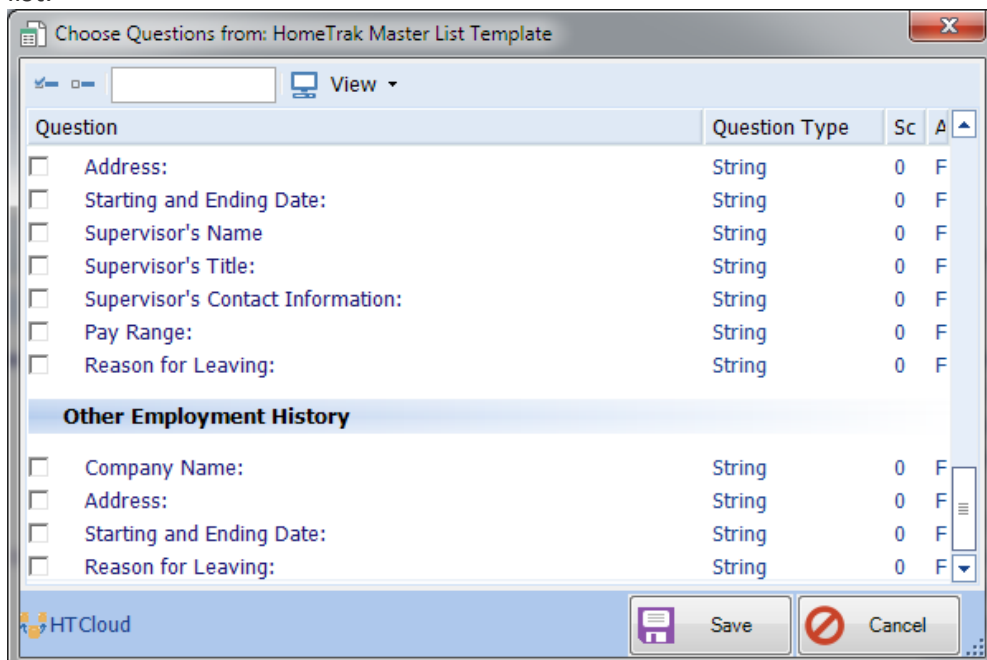
Next, click *Documentation* then click on *Custom Forms* from the menu list.

You will see two tabs, **Topics** and **Questions**.

If the topics are blank you can click on the *Questions* tab and click the **Import** button on the toolbar to see a list of topics and questions we have created for you to choose from.



You can choose to import all or any of these questions: Check the box beside each item you wish to import into your list or you can check or uncheck the entire list using tools provided on the toolbar at the top of the list.



Click the *Save* button to import the checked items into your database.

If you need to add more topics you can do so by clicking the *Topics* tab, then clicking the **Add** button and populating the fields on the screen.

Field Names	Field Descriptions
Context	
Description	Enter the name of the topic area. Example: <i>References</i>
Image	Select an icon to represent the topic. There is a large list of images from which to choose.
Sort	Enter the sort value. The numbered location of where the topic will appear in the list.

If you need to add more questions you can do so by clicking the *Questions* tab, then click the **Add** button and populate the fields on the screen.

The last step is to click the **Save** button to save the questions you have created. Repeat these steps for each question you want to add to the list.

For an explanation on what to put into any of these fields, go to the Main Module and click the **Help** button in the top right-hand corner. Click the topic [Caregiver/Client Applications](#). Next, select [Client or Caregiver Web Application Setup](#) from the list, then click **'Setting up Questions in User Defined...'** You will find a table listing the field names and their descriptions to assist you with completing the question screen.

How to configure the Default Client/Caregiver Application form:

The Client and Caregiver web inquiry/application forms are configured in the *Agency Office Module*, Home tab, **Custom Forms**. This configuration determines the visual appearance of the form, as well as the questions and text that will appear. Each inquiry/application form is configured independently of the other.

Inquiry/application forms can be configured for Clients, Caregivers and Office Staff. Multiple additional forms can be set up under the *'Additional Web Intake Forms'* tab. (For example, you may wish to have a different sets of questions for employees applying to different positions and save these applications under different categories.)

The following demographic information questions are always included in the form:

- Name
- Address, City, State, Zip
- Contact information (Phone, Cell, Email)

Click the *Edit* button to open the **Custom Forms** screen.

The screenshot shows the 'Web Forms Setup' window with the 'Default Caregiver Application Form' tab selected. The configuration includes:

- Type:** Web form Intake (Adds new Person)
- For:** Caregiver (with Preview and Show Report buttons)
- Form Title:** Caregiver Application
- Instructions:** Please answer all questions to the best of your ability
- Min Accept Score:** 0
- Sort:** 0
- Category:** (empty dropdown)
- Notification Email:** (empty text field)
- Office Name, Office Address, Office Logo:** All checked with dropdown arrows.
- Languages, Required Dates, Skills:** All checked with dropdown arrows.

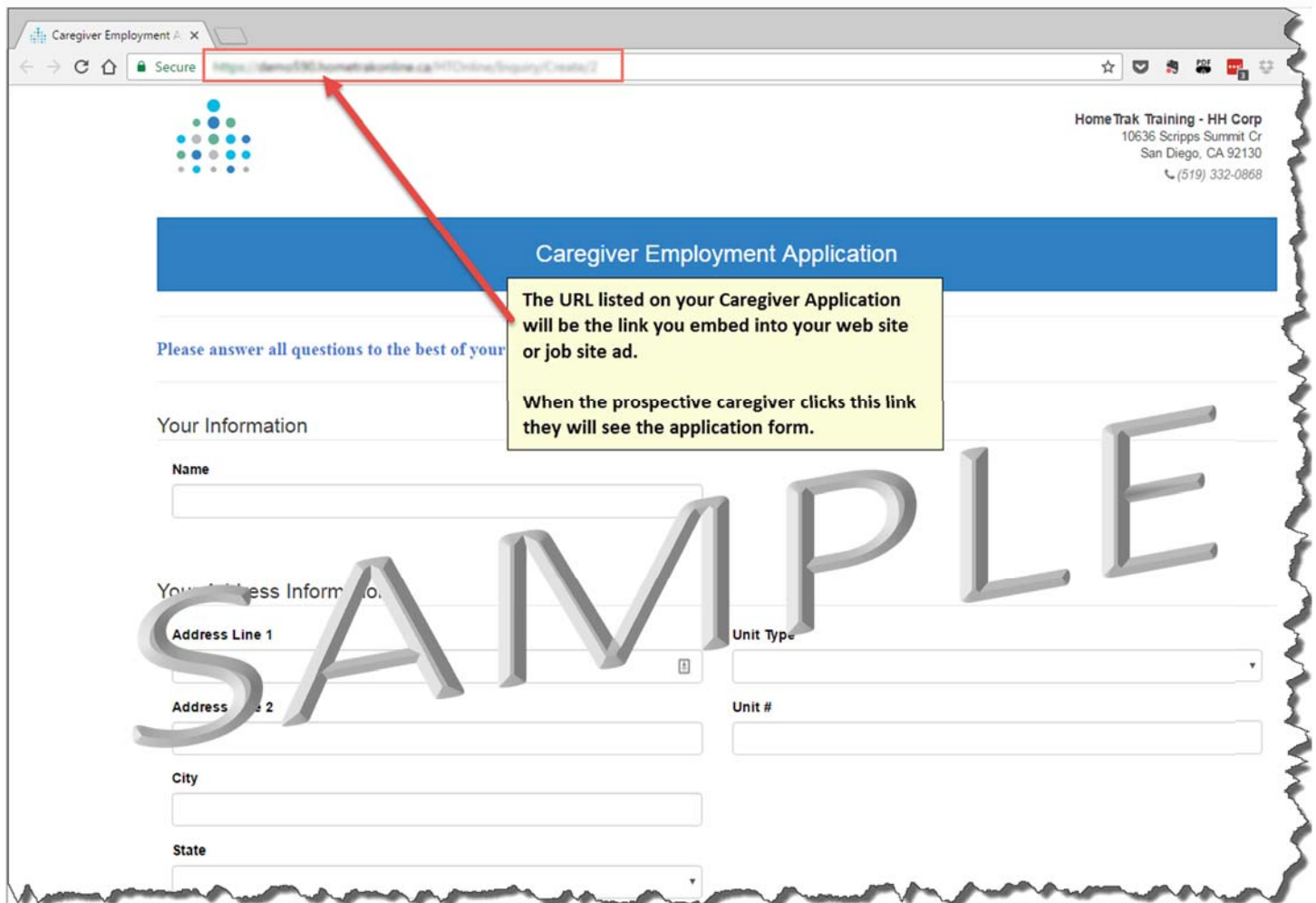
Below the configuration fields is a list of questions under the 'General Questions' category:

- Which Position are you applying for:
- Lowest Acceptable Wage Per Hour:
- Lowest Acceptable Wage for a 24 Hour Live-in:
- Date you can start:
- How did you hear about us?
- Are you a US citizen or legally eligible to hold employment in USA?
- Are you at least 18 years old?
- If NO, how many months before you turn 18?
- Are you related to anyone employed by our company?

The window has a 'Save' button and a 'Cancel' button at the bottom right. The HTCloud Identity logo is visible in the bottom left corner.

For an explanation on what to put into any of these fields, go to the Main Module and click the **Help** button in the top right-hand corner. Click the topic [Client and Caregiver Online Applications](#). Next, select [Client or Caregiver Web Application Setup](#) from the list, then click **'Setting up Application Form...'** You will find a table listing the field names and their descriptions to assist you with completing the question screen. The last step is to click the **Save** button to save the questions you have created.

You can click the **Preview** button to see the layout of the Caregiver Application in a web browser so you can review and determine if there are any changes to be made. If you're happy with the appearance, then copy the URL listed in the browser address bar and embed it into your website or post it as a hyperlink on a job ad.



Close the webpage when you're finished reviewing. Next, click the *Save* button on the Custom Forms screen to save your configured application.

Where does the Caregiver Application get downloaded into the database?

The caregiver and office staff application is downloaded to the Human Resource module.

From the *Main* screen click the *Relationships* then click the **Human Resources** tab. Next click the *Applications* menu then click Caregiver Applications. This opens the Caregiver Applications screen where you will see the applications that have been submitted to your system.

Caregiver applications will be grouped into two statuses—NEW or REJECT—based on how you configured your questions. To view an applicant's information, click one of the line items then click the *Edit* button.

Caregiver Applications

Inquiry Status ↓

New

<input type="checkbox"/>	Year-Month	Intake Date ↓	Question Count	Question Score	Caregiver Name	Caregiver Address	Caregiver Info
<input type="checkbox"/>	2017-03-Mar	Mar 30, 2017	49	0	Billy Smith	123 Main, Samia, AL 77777	(111) 222-3333

Potential

<input type="checkbox"/>	Year-Month	Intake Date ↓	Question Count	Question Score	Caregiver Name	Caregiver Address	Caregiver Info
<input type="checkbox"/>	2017-03-Mar	Mar 09, 2017	49	0	Duck, Daisy	123 Main Street, Orlando, FL 9121	(555) 555-5555

The *Web Intake and Office Inquiry Form* will open. To view how the applicant answered the questions on the application, click the *Data from Web* menu on the ribbon then click **Web Intake Questions**.

Web Intake and Office Inquiry Form (HomeTrak Training - HH Corp)

Home

Name:
 Phone:
 Received:

Cell:
 Potential:
 Assessed:
 Active:

Type:

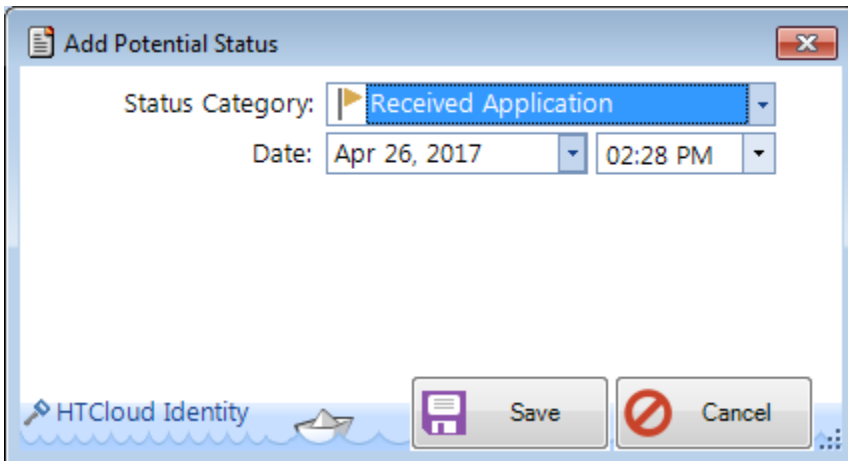
This opens the *Web Intake Questions* screen where you can scroll through the responses to the questions. Click **OK** to close the screen and return to the *Web Intake and Office Inquiry Form* screen.

Web Intake Questions -

Inquiry Questions	Response	Date
General Questions		
<input type="checkbox"/> Which Position are you applying for:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Lowest Acceptable Wage Per Hour:	0	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Lowest Acceptable Wage for a 24 Hour Live-in:	0	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Date you can start:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> How did you hear about us?	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Are you a US citizen or legally eligible to hold employment in USA?	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Are you at least 18 years old?	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If NO, how many months before you turn 18?	0	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Are you related to anyone employed by our company?	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If yes, name of the person, relationship and location employed:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Have you ever worked for our company?	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If YES, give date:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If YES, enter location:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If YES, enter Supervisor's Name:	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> Do you have any disabilities that may limit your ability to perform the wc	[Not Answered]	Mar 30, 2017 02:04 PM
<input type="checkbox"/> If YES, please explain:	[Not Answered]	Mar 30, 2017 02:04 PM

After reviewing the application you may decide to proceed with the hiring process. You will make the caregiver potential. To do so, click the *Make Potential Status* tool on the ribbon to copy all information from the application into the Human Resources and Caregiver Modules.

The *Add Potential Status* screen will appear for you to set the date and time and click **Save**.



The screenshot shows a dialog box titled "Add Potential Status". It has a "Status Category" dropdown menu currently set to "Received Application". Below it, there are two date and time pickers: "Date" set to "Apr 26, 2017" and a time picker set to "02:28 PM". At the bottom of the dialog, there are two buttons: "Save" and "Cancel". The "HTCloud Identity" logo is visible in the bottom left corner.

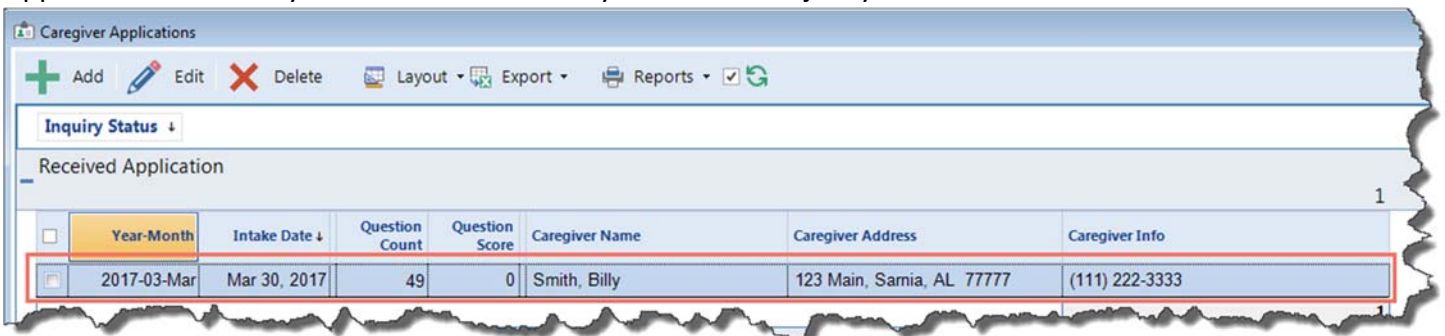
Next, you will be prompted to *Add a Referral Source?* Click Yes or No. If you don't have this information you can add it at a later time in the Caregiver tab under *Documentation* menu, *Referral* feature.

Then you will be prompted to *Add a Task?* Click Yes or No.

When the *Complete* message appears, click **OK** to finish the process of making the caregiver potential.

The status now shows POTENTIAL on the Caregiver Applications screen. You can now delete this applicant from this screen. You are only removing this applicant from the list—you are not deleting any information from Companion (it's all in the Human Resource and Caregiver Modules).

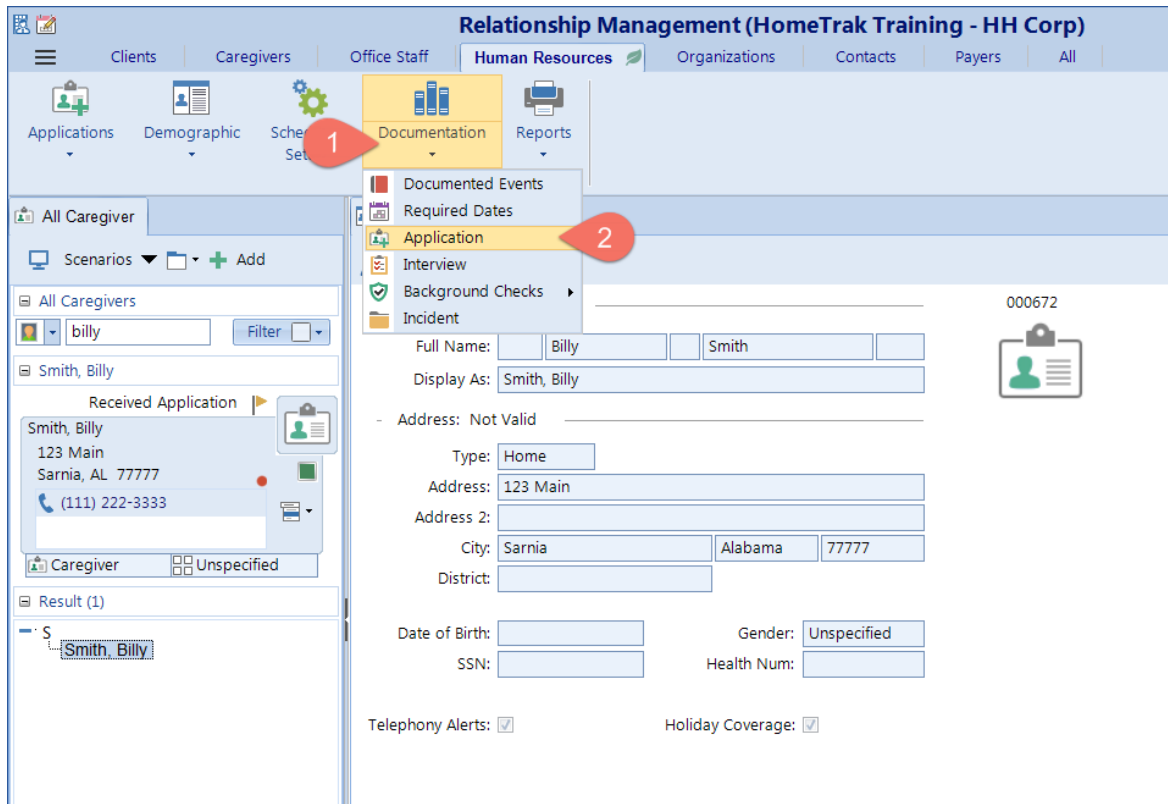
If you decide not to continue with the hiring process you can delete the application from the Caregiver Application screen or you can leave it there if you're not sure just yet.



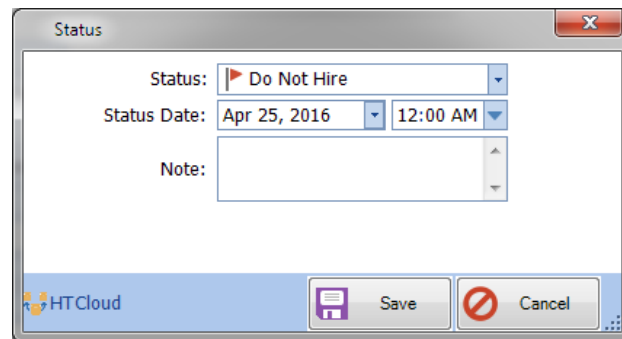
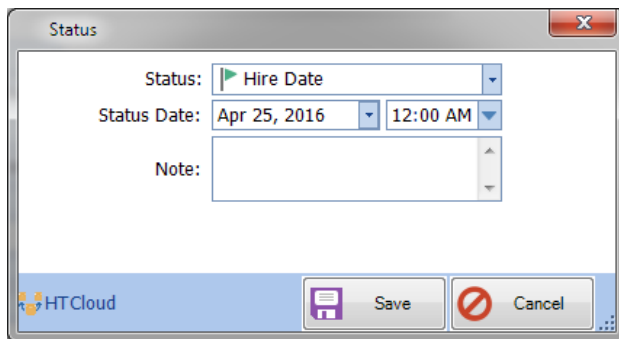
The screenshot shows the "Caregiver Applications" screen. At the top, there are buttons for "Add", "Edit", "Delete", "Layout", "Export", and "Reports". Below that, there is a filter for "Inquiry Status" set to "Received Application". A table displays the application details:

	Year-Month	Intake Date ↓	Question Count	Question Score	Caregiver Name	Caregiver Address	Caregiver Info
<input type="checkbox"/>	2017-03-Mar	Mar 30, 2017	49	0	Smith, Billy	123 Main, Samia, AL 77777	(111) 222-3333

If you want to review the application at any time, you can click the *Documentation* menu then click the *Application* tool.



The next step is to setup an interview to evaluate the applicant. Once the interview is completed you will add the status of *Interviewed*, then decide if you are going to hire them or not. If you hire them add the status of *Hire Date*. If you not going to hire them then add the status of *Do Not Hire*.



If you decide to not hire the caregiver you don't have to enter any further information on the caregiver. If you decided to hire the applicant you will start to add the following information:

- Demographics
 - Relationships (Emergency Contact)
- Scheduling Setup (only the features you are using)
 - Payroll Rates, Payroll Options, Qualifications, Preferred Districts, Skills, Event Reminders
- Documentation
 - Required Dates

If you are using these features. All of this information can be added in the Human Resource or Caregiver Module.

APPENDIX

Sample of **Legal Message** that may appear at the bottom of your application above the Submit.

Caregiver Employment A x

Secure | <https://demo590.hometrakonline.ca/HTOnline/Inquiry/Create/2>

Other Employment History

Company Name:

Address:

Please enter in Address, City, State and Zip

Starting and Ending Date:

Example: Jan 1, 2014 - June 1, 2014

Reason for Leaving:

This is a sample of the *Legal Message* you can add to the Application setup which appears at the bottom above the *Submit* button.

I certify that the information contained in this application is correct to the best of my knowledge. I understand that to falsify information is grounds for refusing to hire me, or for discharge should I be hired.

I authorize any person, organization or company listed on this application to furnish you any and all information concerning my previous employment, education and qualifications for employment.

I also authorize you to request and receive such information. In consideration for my employment, I agree to abide by the rules and regulations of the company, which rules may be changed, withdrawn, added or interpreted at any time, at the company's sole option and without prior notice to me.

I also acknowledge that my employment may be terminated, or any offer or acceptance of employment withdrawn, at any time, with or without cause, and with or without prior notice at the option of the company or myself.

Submit

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Sample of the **Submit Message** that appears on the Thank-you screen after you click the Submit button.

Caregiver Employment A x

Secure | <https://demo590.hometrakonline.ca/HTOnline/Inquiry/Create/2>

This is a sample of the 'Submit Message' that you can add to any of the forms.

HomeTrak Training - HH Corp
10636 Scripps Summit Cr
San Diego, CA 92130
(519) 332-0868

Caregiver Employment Application

Form Submitted Successfully. Thank You.

Only those considered for employment will be contacted. Thank-you for your interest.

Submit Another

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