



# HomeTrak

Your expert companions in home care software

## HOMETRAK COMPANION

Updating User Login procedure for HomeTrak V6.3

For Caregivers

HTOnline and Mobile App

## Why did HomeTrak change the log in procedure?

We changed the log in procedure for many reasons.

- We have eliminated the need to forward Caregivers Access Keys.
- The mobile app as well as the Caregiver HTOnline web portal uses the same user name and password.
- Users can now manage their own passwords without having to contact the office for a new password.

## Steps to updating Caregivers one at a time to the new log in system.

The steps below are going to demonstrate how you can add Caregivers either individually or in bulk, to the new log in system.

### Individually adding Caregivers to HT Log in.

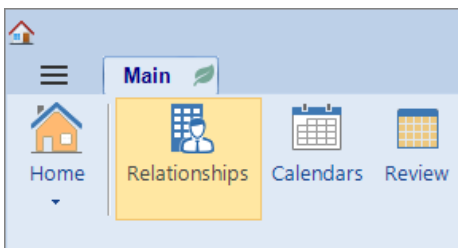
From the Main Module open Relationships and select either the *Caregiver* or the *Human Resources* tab and select the desired Caregiver. From the Profile tab, select the *Account* drop down menu then select **'Manage Users Account (Identity)'**. If their email address isn't already in the User name field, please type it in and also type it in the Email field. Both of these fields will be the same. Once these fields are filled in, click on **'Create and Email Identity Account'** and your Caregiver will receive an email with instructions on how to create their own password. You do not need to create security for your Caregiver, by default the system will give them *"No Security"*, which will only give them access to the pre-determined accessibility available on the mobile app for caregivers as well as the Caregiver HTOnline portal. [Using the Calendar](#)

### Step One:

Login into HomeTrak Companion.

### Step 2

Press the *Relationship Management* icon in the main menu.



### Step 3

Click on either the *Caregiver* tab or the *Human Resources* tab.

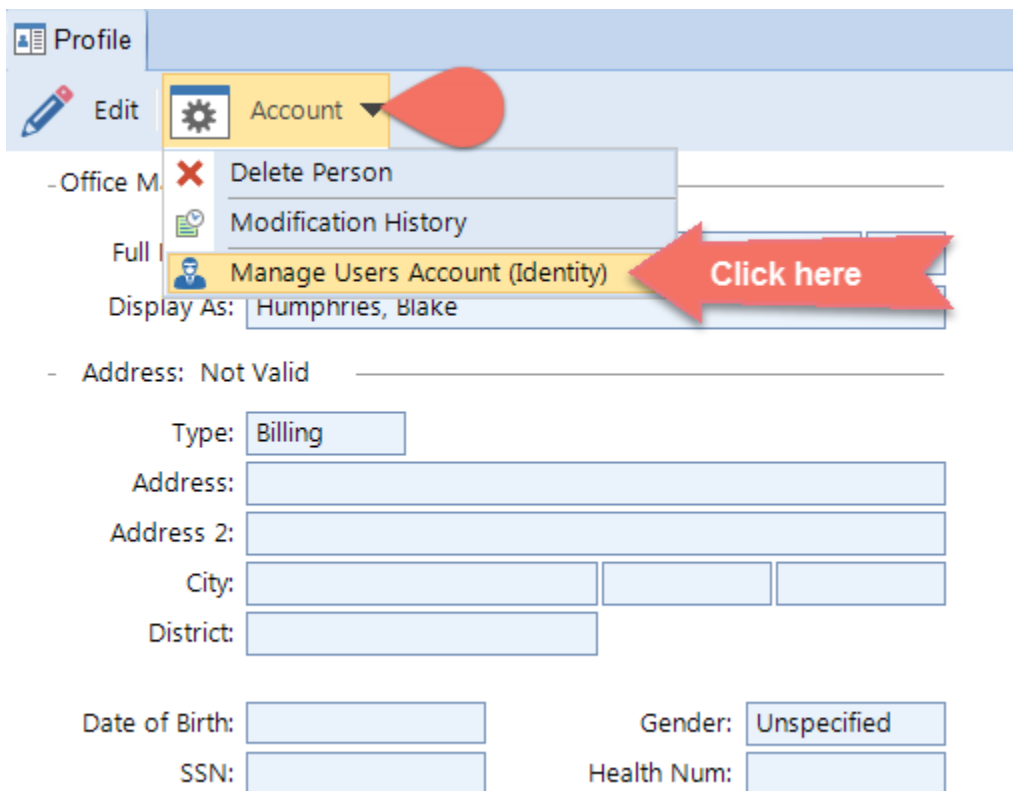


### Step 4

Choose the **Caregiver** you want to send the identity email to by choosing the person in the window on the left.

### Step 5

From the "Profile" tab, click on the "Account" drop down menu and choose the "Manage Users Account (Identity)" option.



## Step 6

You will now create an identity account. Confirm that the “*User Name*” and “*Email*” fields have the correct email address for the Caregiver. The user name **must** be the email address!

The screenshot shows a 'Manage Identity Account' window. The 'User' field is 'Wright, Sue'. The 'User name' and 'Email' fields both contain 'sue.wright@hometraksupport.com'. A yellow callout box with red arrows pointing to these fields says 'Both the **User name** and **Email** fields must be the same.' A red arrow points to the 'Create and Email Identity Account' button with the text 'Click here'.

Click the “**Create and Email Identity Account**” button.

You will be prompted “*Are you Sure?*”. When you press Yes the account will be created and the new identity email will be sent to the office staff.

Repeat step 4 – 6 for each active Caregiver or you can elect to use the Bulk add method below.

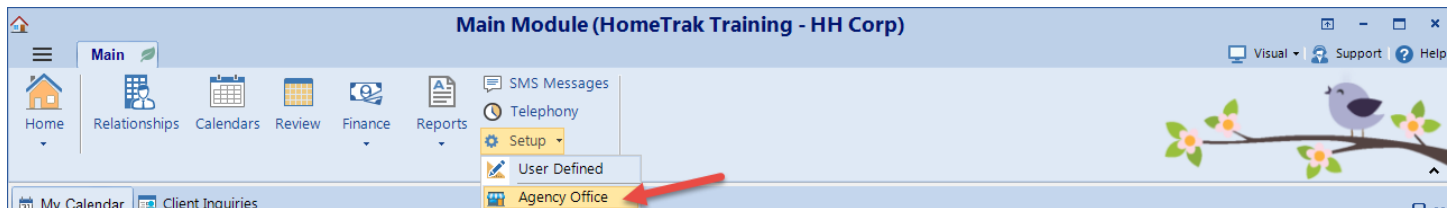
## Steps for setting up your Caregivers in using the Bulk Add method.

From the *Main Module* click on *Setup* then select *Agency Office*. At the top left hand corner you will find a small “person” (👤) icon, click on it and a window will open titled: “*Bulk Add Security Accounts*”. Scroll within the window to display the Role: Caregiver. If their email addresses are not already being displayed, you must put them in and you **must also ensure the Username and Email field are exactly the same. This is imperative.** Once these fields have been created, simply check all the caregivers you wish to create an Identity account for.

You will be prompted “*Are you Sure?*”. When you press Yes the account will be created and the new identity email will be sent to the selected Caregivers.

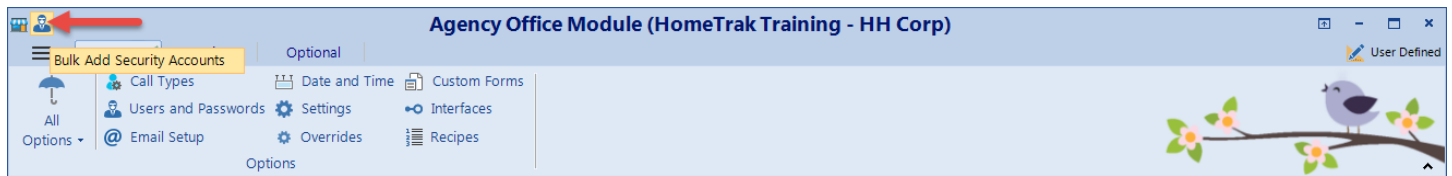
### Step One:

From the Main Module, select *Setup* menu then *Agency Office*.



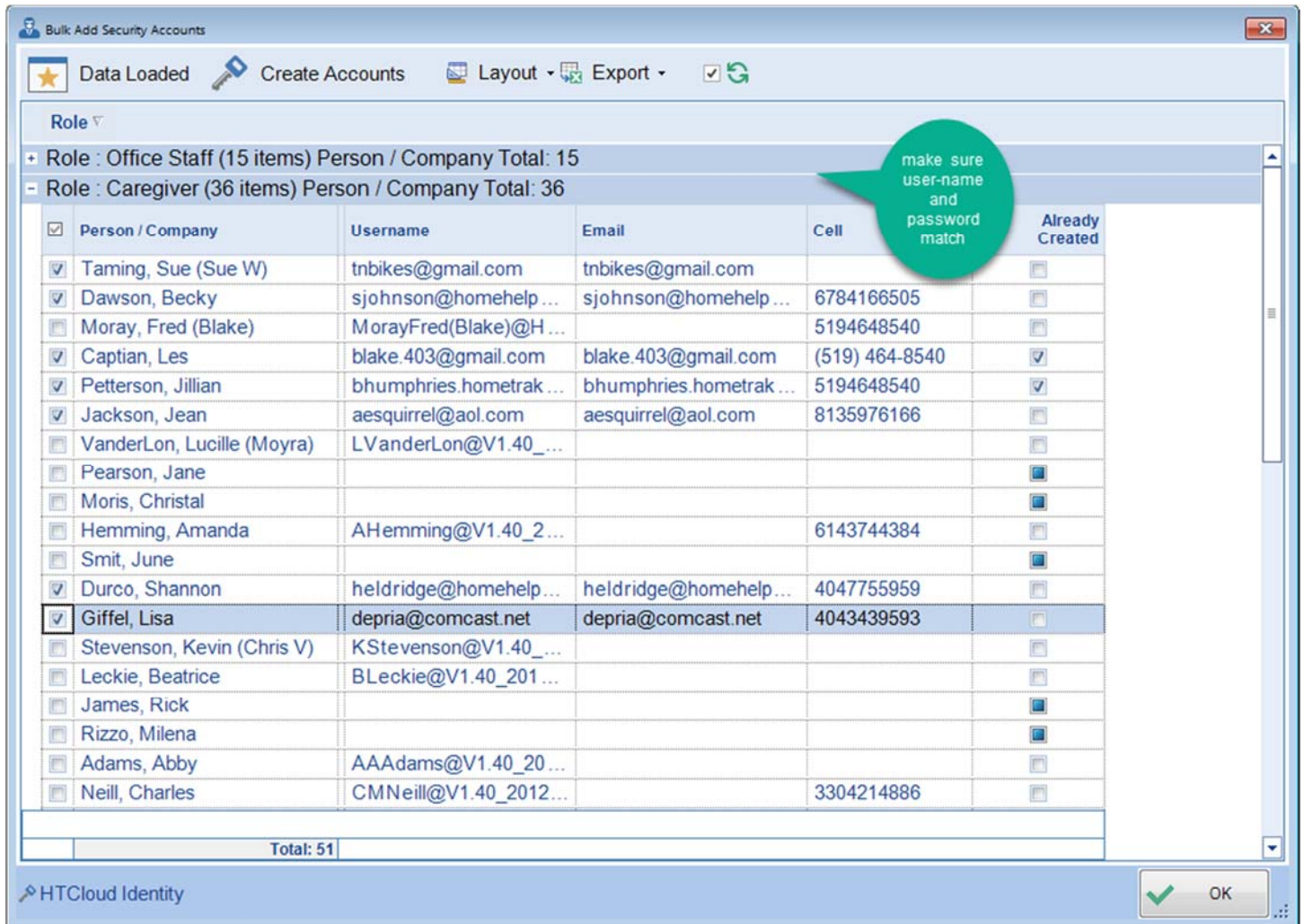
## Step Two:

Select the 'person' (👤) icon the top left corner of the Agency Office screen.



## Step Three:

Select the Caregivers you want to create an identity account for and click **Create Accounts**.



You will be prompted "Are you Sure?". When you press Yes the accounts will be created and the new identity emails will be sent to the selected Caregivers. Click **OK** to close the screen.

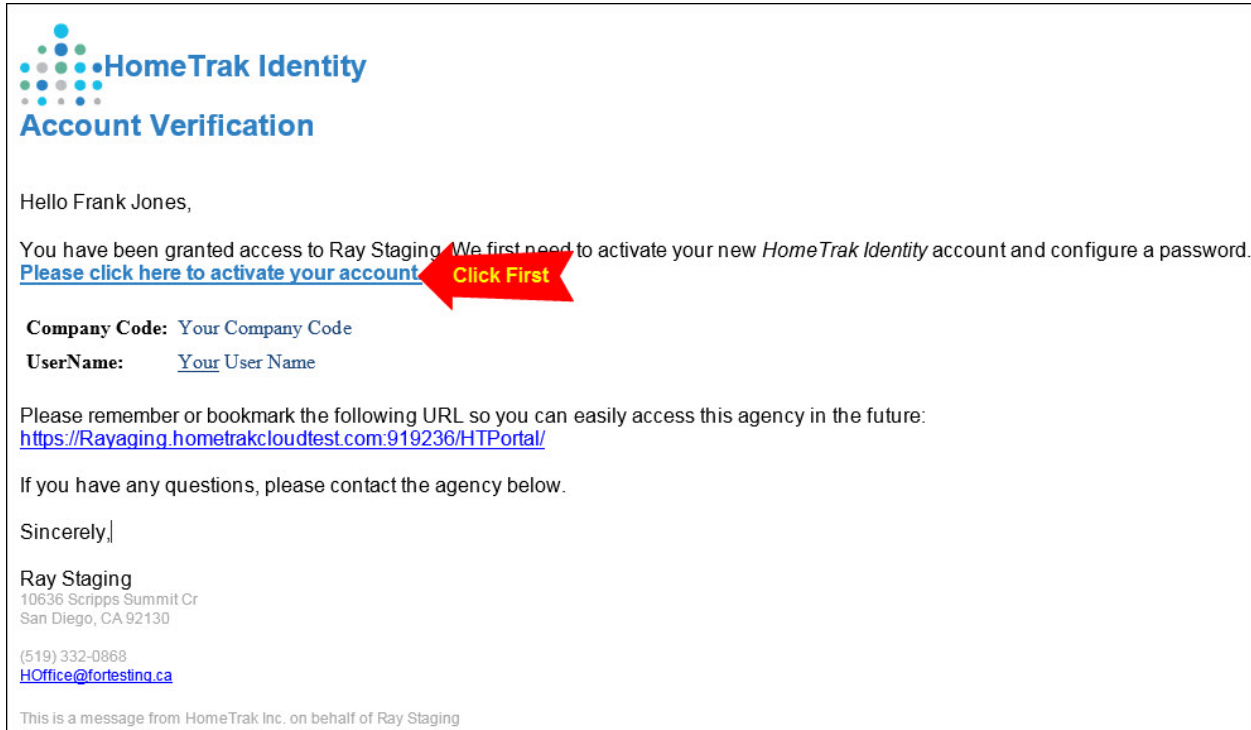
**Congratulations!** You have successfully setup new identity accounts for each selected Caregiver in HomeTrak Companion.

Each user will receive an email with the procedure for activating their account. Follow the steps below for activating an account and they will simply follow the steps below. It's a very simple process.

# Activating New Identity Account HomeTrak Version 6.3

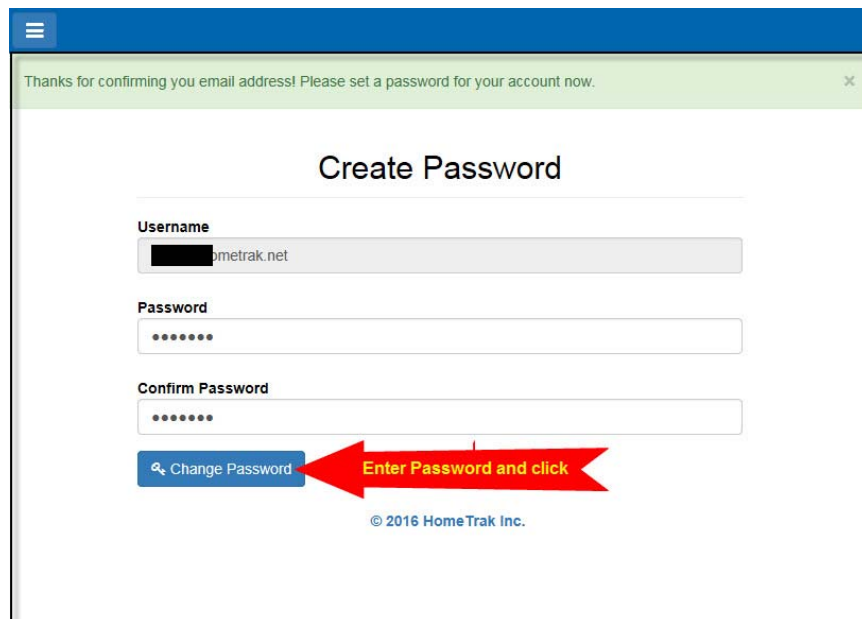
## Step 1

An email will now be sent to the specified email address. They will open the email and click on the **“Please click here to activate your account”** link.



## Step 2

They must now enter in and confirm a password and click **“Change password”** button.



### Step 3

They will now be directed to HTOnline portal log in screen. It is important to log into the portal as you will be prompted to enter in security questions which will be required if you forget your password. Enter in your newly created password and click on **“Log in”** button.

### Step 4

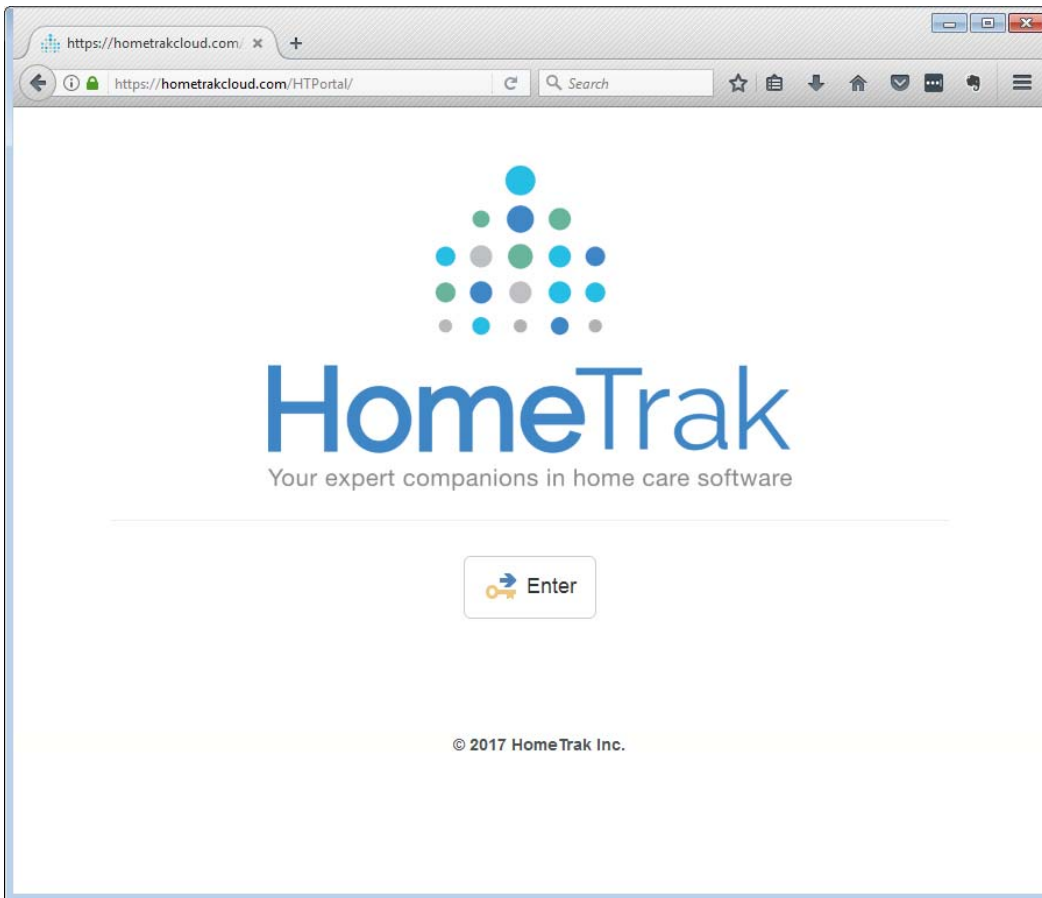
They must now enter in all the security questions and press save. These security questions will be used if they ever need to change their password.

Close the web browser.

## Step 5

Please remember or bookmark the following URL so you can easily access this agency in the future:  
<https://xxxxxxxxxx.hometrakcloud.com/HTPortal/>

From the link in their email it will take them to this log in screen. When they hit enter from this screen it will take them to the Caregiver Portal.



**Your Caregiver can also go to the APP Store and download the HomeTrak Companion App for Caregivers and use their same username and password to log in.**

**Congratulations!** You have successfully completed the new log in procedure for HomeTrak Version 6 for the Caregiver.