



# HomeTrak

Your expert companions in home care software

## HOMETRAK COMPANION

SMS TEXT MESSAGING

VERSION 6.3

HomeTrak has introduced a suite of features to allow communication to your caregivers via [SMS text message](#) directly from the Companion program.

## Pre-Requisites

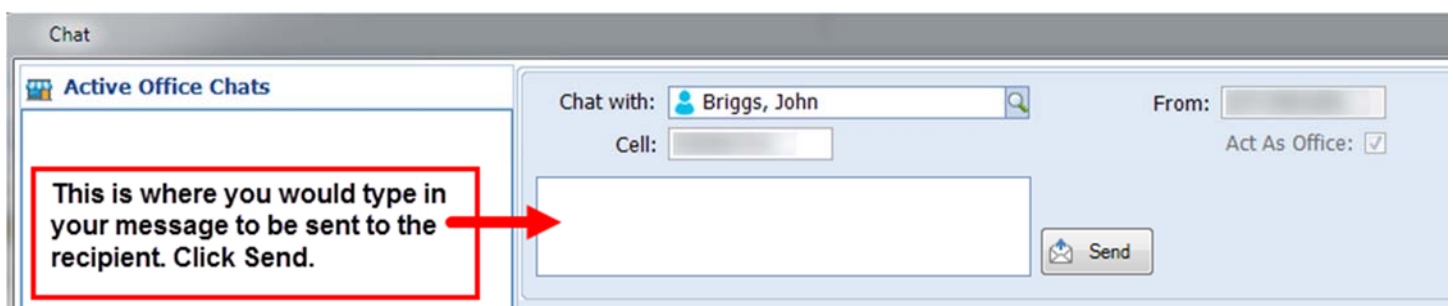
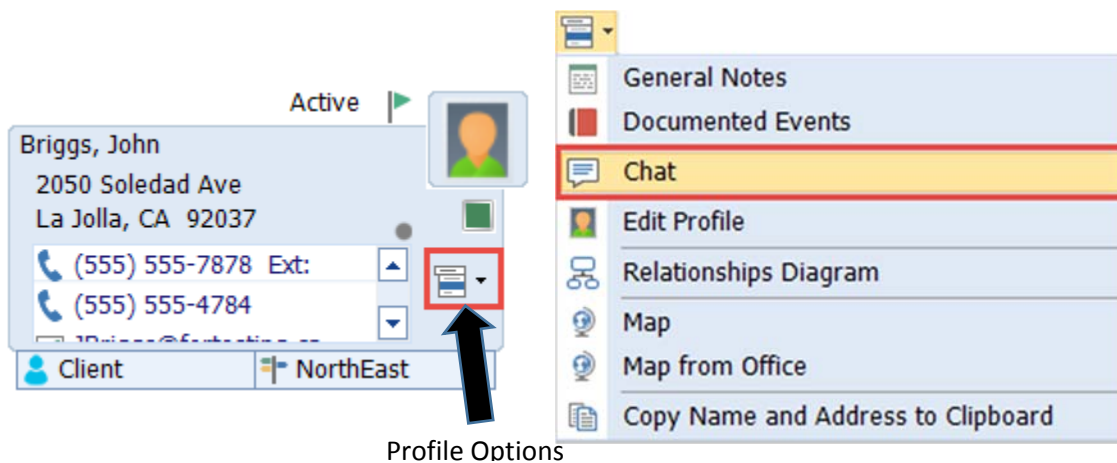
- In order to use texting from Companion, you will need to contact HomeTrak Sales to obtain pricing options and a contract to be signed for this added feature.
- Once the contract has been signed, you will be contacted by our team to set up your designated phone number and to go over the texting options.

## How to send a Text Message to either a Client, Caregiver or Office Staff:

**Method 1:** You will go into either the Client, Caregiver or Office Staff Module to send a message.

Throughout the program, wherever you see the person's profile information at the top of the Find Area at the left of the screen, you can find a Chat button in the dropdown menu button on the profile display. Click on this tool to open a chat screen with this person. Enter your message in the box at the top left of the screen and send it to that person.

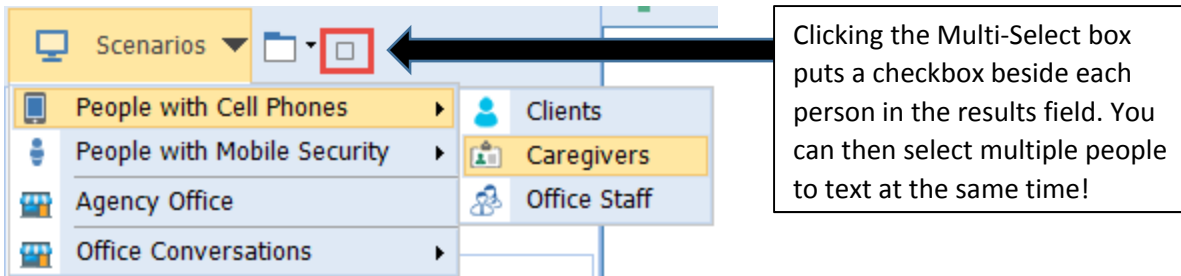
You can see your message history between the office and this person in this same Chat window, or in the SMS Messages Module.



**Method 2:** You can send a text to anyone in the *SMS Messages Module*.

Off the Main Module, click on the SMS Messages (chat bubble ) icon on the ribbon.

To send a message, you will need to *click* on the **Scenarios** drop-down and choose **People with Cell Phones**. You can then further choose Clients, Caregivers or Office Staff.

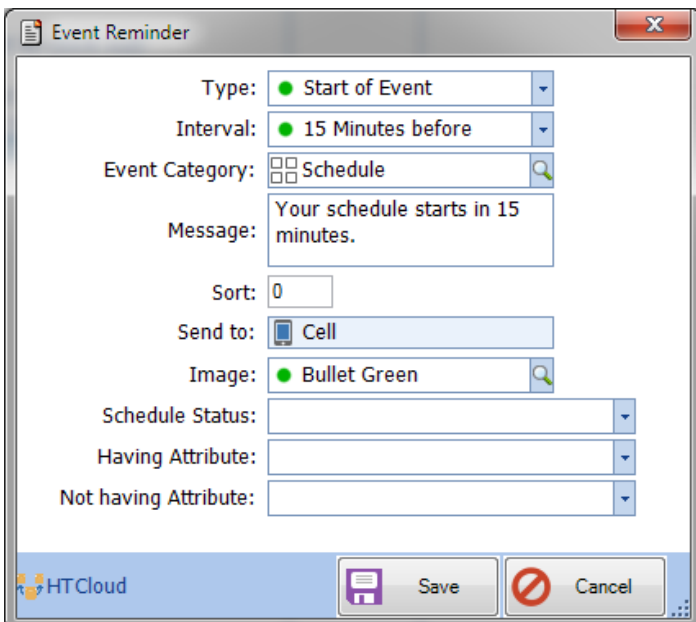


Once you select the appropriate grouping of people to send a text to, the results field will update with all the people in that module that have a Cell phone added onto their profile.

## Event Reminders:

The [Event Reminders](#) feature may be used to send reminder messages to a caregiver before and/or after events. Reminder setup is done in User Defined Module (Scheduling – Event Reminders). You can then customize what reminder message each Caregiver gets in the Caregiver Module under the Scheduling Setup dropdown menu on the ribbon.

Event Reminders may be configured to send before the start and/or end of a schedule and can be used to remind caregivers of upcoming events, or to remember to clock in to a schedule using Telephony.



Event Reminder

Type: ☒ Start of Event

Interval: ☒ 15 Minutes before

Event Category: ☐ Schedule

Message: Your schedule starts in 15 minutes.

Sort: 0

Send to: ☐ Cell

Image: ☒ Bullet Green

Schedule Status:

Having Attribute:

Not having Attribute:

HTCloud Save Cancel

You can also customize what message is being sent out as well by utilizing the below descriptive text options.

**\*NOTE\*** '<' and '>' brackets are required in order for the text to show up the way intended

**Warning:** Depending on the fields you use, your text message may become quite large and may be broken into two or more messages, thus incurring extra costs.

**TEXT****DESCRIPTION**

<ID> or <Code>	Person's ID #
<Value>	Full Name (Display Name)
<Title>	Title
<First>	First Name
<Middle>	Middle Name
<Last>	Last Name
<Suffix>	Jr., Sr., etc.
<TitleInitial>	Only the First Character of the Title
<FirstInitial>	Only the Character of the First Name
<MiddleInitial>	Only the First Character of the Middle Name
<LastInitial>	Only the First Character of the Last Name
<SuffixInitial>	Only the First Character of the Suffix
<Location> or <Address>	Street Address (location of the schedule/event)
<City>	City
<State> or <Province>	State or Province
<Zip> or <MailCode>	Zip Code or Postal Code
<EventID>	Event ID from Calendar
<Start>	Start Time
<End>	End Time
<Hours>	Length of the Event in Hours
<CallType> or <Service>	Call Type/Service Code on Schedule
<CallTypeCode> or <ServiceCode>	Call Type or Service Code
<Category>	Event Category
<Note>	Event Information (tasks & appointments)
<Status>	Event Status

**Telephony Alerts:**

There is also a new option in [Telephony Alerting](#) to choose an Alert message to send to a caregiver. This message will be sent at the same time as the first no clock-in message, and will be exclusively sent to the caregiver's Cell phone as an SMS text message. This message alerts the Caregiver that they did not clock in. This feature saves you time having to contact the Caregiver to inform them to clock in for their shift.

From the *Main Module*, click on *Setup, Agency Office*. Once this module opens up, click on the *Optional* tab and click on *Schedule Alerts*.

Alert Period

Alert From: Sun 12:00 AM

Alert to: Sun 12:00 AM

Monitoring Period Start Alert: Alert Period Starti...

Monitoring Period End Alert:

Verify Message:

Send Every: 10

Schedule Notice Message: Has Clocked In

Send Minutes: 13

First Alert Message: SMS Alert - First...

Send Minutes: 10

Caregiver Alert Message: SMS Alert - Caregi...

between 1st and 2nd Message: SMS Alert - Has Cl...

Send Minutes: 21

Second Alert Message: SMS Alert - Secon...

Alert Email Type: Cell

Recipients:

+ Add - Delete

When you receive your First Alert the Caregiver hasn't clocked in, the Caregiver will receive a text message

HTCloud Save Cancel

## Hashtag:

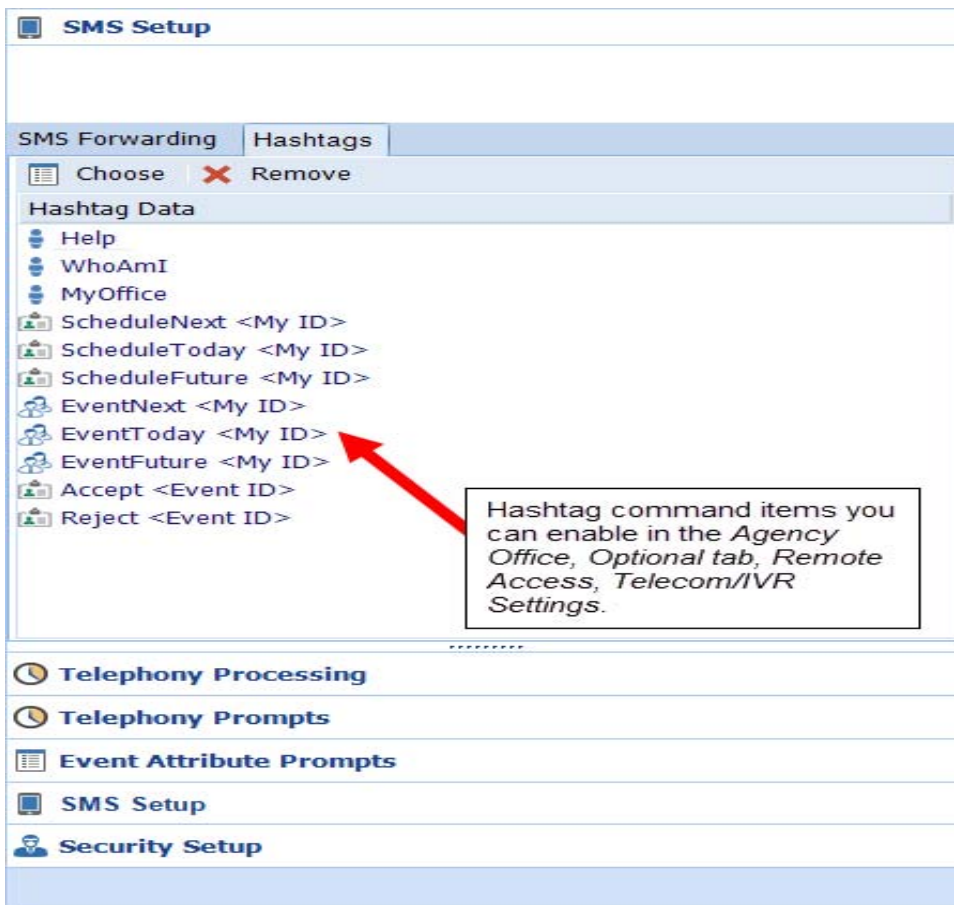
HomeTrak Companion's SMS Texting feature supports several interactive user commands to retrieve data or perform other actions. The hashtag features allow your Caregivers or Office Staff to send specific commands to the office texting number to obtain information such as upcoming schedules or events, their ID # for Telephony and even to accept or reject available schedules (Caregiver Suggestion) without having to contact the office directly. For more information, please refer to the *Help Module* and click on **IVR & SMS Texting Features**.

You must enable the particular commands you wish to make available. Only enabled commands will be recognized as valid by a user.

[Enabled Hashtags](#) are configured in the *Telecom-IVR Settings* tool under the **Remote Access** menu in the **Optional** tab in the *Agency Office Module*.

Users can text the office texting number using these commands (see below) by entering the command text preceded by a hashtag (#) symbol.

For example, texting '#help' to the office SMS number will respond with the list of commands that are available to the user. '#whoami' will return the identity (name and ID) of the person by looking up the cell phone number in the system.



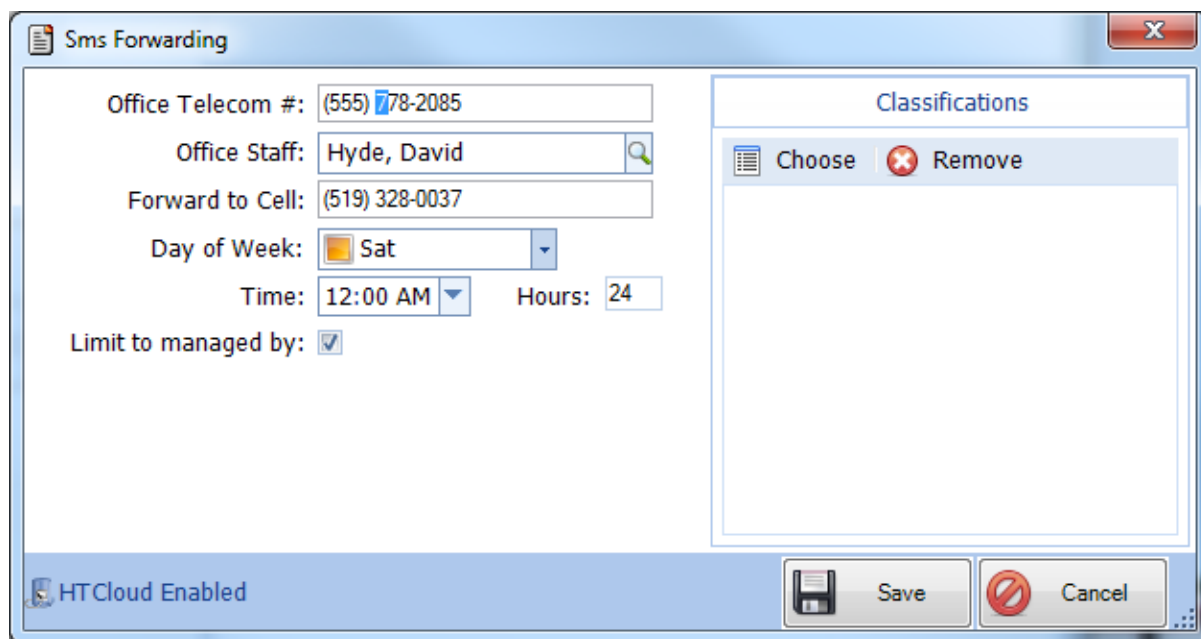
## Forward a Copy of an Incoming Text Message to an Office Staff Person's Cell:

**NOTE:** As this feature will send a copy of the message to the office staff person as a second text message, enabling these features may significantly increase your texting costs.

HomeTrak Companion allows you to forward a copy of incoming text messages as a text message to an office staff person's cell phone. This can also be configured to send for specific day and time ranges, so it can be used to monitor after-hours messages by an on-call staffer, for example. You can set up multiple forwarding ranges for different days, times or office staff people.

'Hashtag' command messages will not be forwarded.

Setting up forwarding of incoming text messages is configured in the *Telecom - IVR Settings* tool in the **Optional** tab of the *Agency Office Module*, under the Remote Access dropdown tool. Edit the settings and click on the SMS Setup section of the explorer panel on the right side of the window. Then click Add to set up forwarding periods.



The screenshot shows the 'Sms Forwarding' configuration window. On the left, there are input fields for 'Office Telecom #' (set to (555) 778-2085), 'Office Staff:' (Hyde, David), 'Forward to Cell:' (519) 328-0037, 'Day of Week:' (Sat), 'Time:' (12:00 AM), 'Hours:' (24), and a checked 'Limit to managed by:' checkbox. On the right, there is a 'Classifications' section with 'Choose' and 'Remove' buttons. At the bottom, there is a status bar indicating 'HTCloud Enabled' and 'Save' and 'Cancel' buttons.