

CoActiveSoft Client Portal

CoActiveSoft Client Portal assists home care businesses by providing relevant information to clients and their delegates and by allowing clients to verify the time caregivers spend working for them. Moreover, the client portal serves as a tool to communicate general announcements to all clients.

Client Portal Setup

CoActiveSoft allows agencies to customize their logos and to display messages on the home screen. These options make it possible for the CoActiveSoft client portal to seamlessly fit into the agencies communications and marketing strategy.

Customize Corporate Logo

To set the corporate logo for the portal, first go to the main company profile using CoActiveSoft and go to the 'Management' tab, then the 'Company details' section. Click on the edit button as shown below:

Home Care Agency

Address 12345 SE 1st ST
Seattle WA 98005 [Show on map](#)

Phone 425-123-9876

Email info@homecare-agency.com

Category Client

Tags

[Scheduling](#) [Operations](#) [Management](#) [Forms](#) [Associations](#) [Marketing](#)

Emergency Information

Products

Financial Information

Company details

Primary yes

Paid by others product [Paid by others](#)

Saturday rate multiplier

Sunday rate multiplier

Pay period Bi-weekly

Travel time product [Travel time](#)

Travel shift time limit 120 Minutes

Masthead image

Other

[Delete profile](#) [Clone profile](#) [Back](#)

Profile Screen of Company

After clicking on the edit button, upload the 'Masthead image' from your computer:



CoActiveSoft
Solutions for Service Providers

- > info@coactivesoft.com
- > 206-248-1884
- > 2115 SW 152nd Street, Seattle WA 98166

Masthead image

Browse...

No file selected.

Cancel

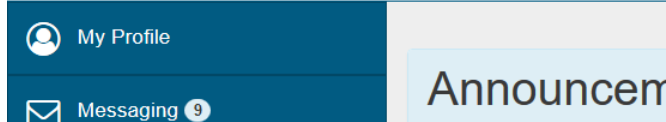
Save

Edit Company Details, bottom of page

From this point on, this image will show for both clients and caregivers in their respective portals:



Acorn
Home
Care



Top of page, masthead image shown in top left

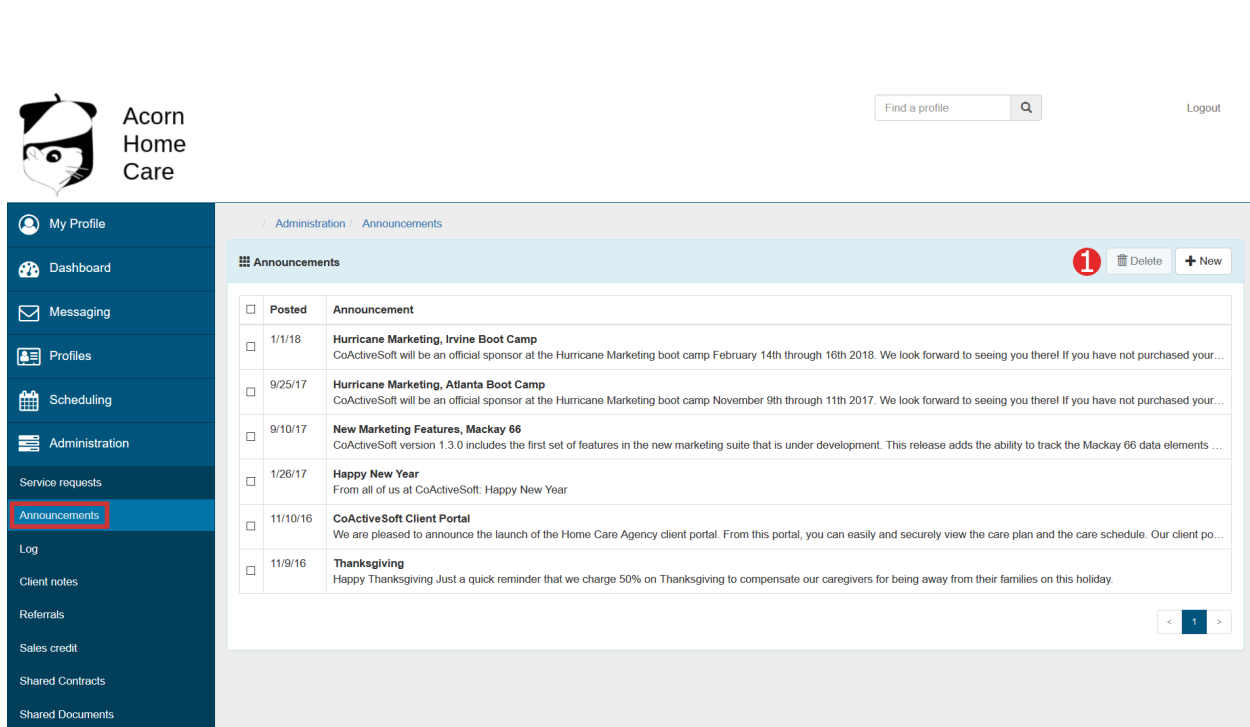
Customize Announcements



CoActiveSoft
Solutions for Service Providers

- > info@coactivesoft.com
- > 206-248-1884
- > 2115 SW 152nd Street, Seattle WA 98166

CoActiveSoft makes it easy to create new announcements to be displayed on the home screen. From the Administration section of the main menu, select Announcements:



The screenshot shows the CoActiveSoft Administration interface. The top left features the Acorn Home Care logo. The top right has a search bar and a Logout link. The left sidebar contains a navigation menu with items like My Profile, Dashboard, Messaging, Profiles, Scheduling, Administration, Service requests, Announcements (highlighted), Log, Client notes, Referrals, Sales credit, Shared Contracts, and Shared Documents. The main content area is titled 'Administration / Announcements' and displays a table of announcements. The table has two columns: 'Posted' and 'Announcement'. The announcements listed are: Hurricane Marketing, Irvine Boot Camp (1/1/18), Hurricane Marketing, Atlanta Boot Camp (9/25/17), New Marketing Features, Mackay 66 (9/10/17), Happy New Year (1/26/17), CoActiveSoft Client Portal (11/10/16), and Thanksgiving (11/9/16). At the top right of the table, there are buttons for 'Delete' and 'New'. A red circle with the number '1' is placed over the 'Delete' button.

To create a new announcement, select New and type the announcement. To delete an announcement, select it and click the delete button (1).

CoActiveSoft Client Portal Layout

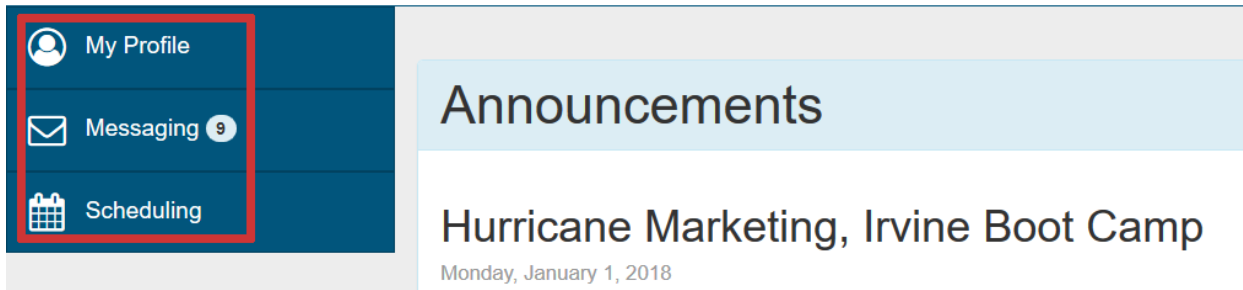
After logging into CoActiveSoft, clients see an interface that allows them to:

- View the latest announcements
- Access their profile
- Access the messaging application



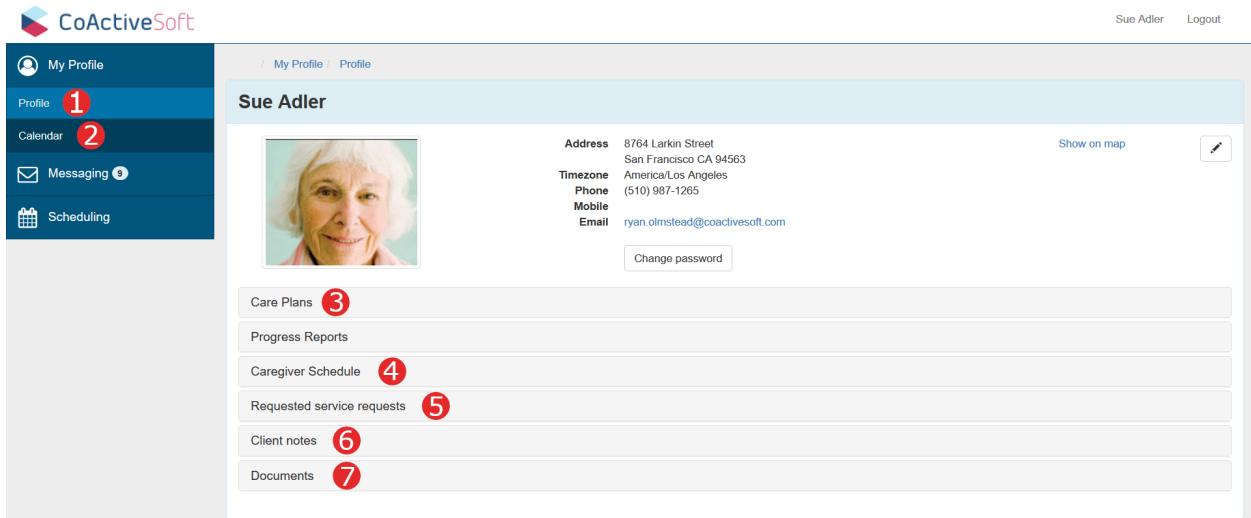
CoActiveSoft
Solutions for Service Providers

> info@coactivesoft.com
> 206-248-1884
> 2115 SW 152nd Street, Seattle WA 98166



For more information about the CoActiveSoft Messaging section, see the [CoActiveSoft Messaging user manual](#).

After selecting 'My Profile', clients can access and edit their profiles (1), schedules (2) care plans (3), caregiver schedule (4), service requests (5), client notes (6), and documents (7).





CoActiveSoft
Solutions for Service Providers

- > info@coactivesoft.com
- > 206-248-1884
- > 2115 SW 152nd Street, Seattle WA 98166

CoActiveSoft Client Portal Layout

Typically, home care agents create a care plan when they start work with a new client. This care plan, if entered in CoActiveSoft, is visible to clients by selecting the Care Plans section on the CoActiveSoft Client Portal Profile (see previous section).

Care Summary

Initially Contacted Date	<input type="text"/>	
Start Date	<input type="text"/>	
Client Diagnosis	<input type="text" value="Deborah has had a number of health issues."/>	
Care Goals	<input type="text" value="Make her comfortable at home and avoid having to go to a SNF"/>	
Proposed Schedule	<input type="text" value="Daily morning to night"/>	
Caregiver Gender Preference	<input type="text" value="female"/>	
Live-In Care Required	<input checked="" type="checkbox"/>	<input type="text" value="24/7"/>
RN Required	<input checked="" type="checkbox"/>	<input type="text"/>
Level 1		
Companionship	<input checked="" type="checkbox"/>	<input type="text" value="gets bored easily"/>
Cooking/ Meal Preparation	<input checked="" type="checkbox"/>	<input type="text"/>



CoActiveSoft
Solutions for Service Providers



> info@coactivesoft.com
> 206-248-1884
> 2115 SW 152nd Street, Seattle WA 98166

Caregiver Schedule

The Scheduled Shifts section is the most important part of the CoActiveSoft Client Portal. Clicking on it provides the client with the schedule for the current month(s). The client can view past, current, and future shifts. To change the date range for which the care schedule is displayed, the clients can select a start (1) and end (2) date of their choice.

Clients can also validate or un-validate shifts. Validating shifts confirms that the caregiver worked the hours scheduled (boxes).

Caregiver Schedule

From  to  Validate Un-Validate

<input type="checkbox"/>	Worked by	Start date	End date	State	Scheduled hours	Worked hours
<input type="checkbox"/>	Victoria Chan	Mon 5/28/18 8:00 AM	Mon 5/28/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Tue 5/29/18 8:00 AM	Tue 5/29/18 5:00 PM	Scheduled	9.00	
<input checked="" type="checkbox"/>	Victoria Chan	Wed 5/30/18 8:00 AM	Wed 5/30/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Thu 5/31/18 8:00 AM	Thu 5/31/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Fri 6/1/18 8:00 AM	Fri 6/1/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Sat 6/2/18 8:00 AM	Sat 6/2/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Sun 6/3/18 8:00 AM	Sun 6/3/18 5:00 PM	Scheduled	9.00	
<input type="checkbox"/>	Victoria Chan	Mon 6/4/18 8:00 AM	Mon 6/4/18 5:00 PM	Scheduled	9.00	



CoActiveSoft
Solutions for Service Providers

- > info@coactivesoft.com
- > 206-248-1884
- > 2115 SW 152nd Street, Seattle WA 98166