

CoActiveSoft Getting Started Guide

Welcome!


Welcome to CoActiveSoft! Your business is appreciated. In this guide, we will go over how to create a client profile, a caregiver profile, a new product, a new shift, and a new invoice.

Throughout this guide, there will be a few links to other guides for more in-depth information.

Accessing CoActiveSoft

It is possible to access CoActiveSoft on any device that has a web browser installed. This includes any desktop with a functional operating system, any smart phone, and any tablet.

There are only two steps. First, open a web browser of your choice (i.e. Google Chrome, Firefox, Safari, etc.) than navigate to app.coactivesoft.com and login. That's it!

  <https://app.coactivesoft.com>

The Main Page

As an administrator, you see a main page with many options, as shown below when you login. This main login page is different depending on whether a caregiver, client, or admin logs into the site.



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- > 2115 SW 152nd Street, Seattle WA 98166

On the left side, there is the main menu (1). This is where you access the different functions of CoActiveSoft. Many of these items have their own user manuals on the support page. At the top of the page, you can search for profiles that you have created (2), which is what we are about to do!

Creating Client and Caregiver Profiles

To create new profiles, the first step is to click on the 'Profiles' section of the main menu (1). This is an overview of all the profiles affiliated with your company:



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CoActiveSoft

Find a profile

Logout

My Profile

Dashboard

Messaging

Profiles

Manage profiles **1**

Scheduling

Administration

Accounting

Reporting

Settings

Profiles / List

Profiles

Active All categories All tags

Acorn Home Care **2**
info@acornhomecare.com
Agent, Referral source **3**
111-777-1111
PO Box 101011
Seattle WA 98116

Sue Adler
ryan.olmstead@coactivesoft.com
Client

Arthur Bacon
arturobacono@gmail.com
Prospect

Sonia Balderon
ryan.olmstead@coactivesoft.com
Caregiver

Deborah Baron
ryan.olmstead@coactivesoft.com
Client

Jim J. Black
jimblack@gmail.com
Delegate

Clone a Profile


4 New

To view a profile, click on their name (2). Information about the profile is listed underneath their name, with their profile type in bold (3). For more information about profiles in general as well as profile types, refer to the [CoActiveSoft Profile Management](#) user manual. Click on the 'New' button to create a new profile (4):




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Timezone 

Email

Username

 User jpwall will be created. A welcome email will be sent to jpw@yah.xyz

Permission level 



No file selected.

- | | | | |
|------------------|-------------------------------------|------------------------|--------------------------|
| Agent | <input type="checkbox"/> | Caregiver | <input type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | Delegate | <input type="checkbox"/> |
| Facility | <input type="checkbox"/> | Hospital | <input type="checkbox"/> |
| Insurance | <input type="checkbox"/> | Nurse | <input type="checkbox"/> |
| Other | <input type="checkbox"/> | Physician | <input type="checkbox"/> |
| Prospect | <input type="checkbox"/> | Referral source | <input type="checkbox"/> |
| Sales rep | <input type="checkbox"/> | Vendor | <input type="checkbox"/> |

Fill out all the information about the new profile to your heart's content. The end of the new profile page is especially important. If you would like the new profile to be affiliated with a user, then



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specify an email, username, and permission level.

If this profile does not need to log in, just specify what type of profile you want them to be (bottom of image).

In this case, we are creating a client profile first. A client profile corresponds to the person that is receiving care from a caregiver.

You create a caregiver profile in the same way, but select 'Caregiver' instead of 'Client' at the end.

A caregiver needs to login to start and end shifts, so their profile should be affiliated with a user. Again, be sure to include an email, username, and permission level in this case. Their permission level should be 'employee'.

Creating a Product

Products are the primary way of defining different services that a caregiver might provide for clients. To create a new product, first access the 'Settings' main menu item and the 'Products' section (1):



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Find a profile

Logout

Settings / Products

Products

Product	Unit price	Cost price
Hourly Home Care	25	15
Non-medical services	25	15
Default daily service	200	15
Default monthly service	4000	15
Default weekly service	1000	15

Here, you can see all of your products. To create a new product, click on the 'New' button (2).

The important things to remember when creating a new product are that the 'Product type' should be 'Service' if it is hourly, the cost price is how much the caregiver gets paid, and the unit price is how much your home care agency bills clients.

After creating a new product, it is easy to create new shifts including your newly created product.

For more information about products, see the [CoActiveSoft Financial Management](#) user manual.

Creating a Caregiver Shift

There are a few ways to create a shift in CoActiveSoft. One of the easiest ways as an administrator is to go to the 'Scheduling' section of the main menu (1).



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The screenshot displays the CoActiveSoft Scheduling / Shifts interface. On the left is a dark blue sidebar with navigation options: My Profile, Dashboard, Messaging, Profiles, Scheduling, Admin calendar, Supertasks, Shifts (marked with a red '1'), Tasks, Sales calls, Administration, Accounting, Reporting, and Settings. The main content area is titled 'Scheduling / Shifts' and features a search bar for profiles. Below the search bar, there are filters for dates (Fri 6/22/18 12:00 AM to Sat 6/23/18 12:00 AM) and a 'Shifts' icon. Action buttons include 'Reset', 'Refresh', 'Search', 'Set state', 'Set payroll state', 'Clone', 'QB Sync', 'Delete', 'CSV', and '+ New' (marked with a red '2'). The main area lists four shifts, each with a 'Show details' link and a set of icons (calendar, edit, delete):

- Shift 0002587, Client: Brian F. Enno, Assigned to: Peter Dukes, Fri 6/22/18 6:00 AM - Fri 6/22/18 4:00 PM
- Shift 0001992, Client: Paul Harrison, Assigned to: Whitney Brewer, Fri 6/22/18 6:00 AM - Fri 6/22/18 5:00 PM
- Shift 0002084, Client: Hank P. LaForge, Assigned to: John Johnson, Fri 6/22/18 8:00 AM - Fri 6/22/18 5:00 PM
- Shift 0002176, Client: Sue Adler, Assigned to: Victoria Chan, Fri 6/22/18 8:00 AM - Fri 6/22/18 5:00 PM

To create a shift for a caregiver, click on the 'New' button in the top right of the screen:



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Once the new shift window opens, you can customize who the shift is assigned to (2), which client is receiving the service (1), the start and end time (4), and the service product that the caregiver is providing (3).

Additionally, be sure to specify the caregiver wage and billing rate to your own amounts (5).

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

Viewing and Creating Invoices

Invoices are listed under the 'Accounting' main menu section (1):

Invoice number	Invoice date	Invoice total	Client	Due date	State	QB Sync	
	Jun 22, 2018	\$290.00	Deborah Baron	Jul 22, 2018	Draft		-
	Jun 22, 2018	\$250.00	Deborah Baron	Jul 22, 2018	Draft		-
	Jun 20, 2018	\$1,800.00	Demo Client	Jun 20, 2018	Draft		-
	Apr 20, 2018	\$2,650.00	Sue Adler	Apr 20, 2018	Draft		-
	Apr 20, 2018	\$500.00	Sue Adler	Apr 20, 2018	Draft		-
001289	Apr 8, 2018	\$2,000.00	Brian F. Enno	May 8, 2018	Overdue		-
001288	Mar 8, 2018	\$250.00	Deborah Baron	Apr 7, 2018	Overdue		-
001287	Mar 8, 2018	\$785.00	Deborah Baron	Apr 7, 2018	Overdue		-
001286	Mar 31, 2018	\$3,600.00	Bill Lumbergh	Mar 31, 2018	Overdue		-
001285	Mar 31, 2018	\$3,600.00	Paul Harrison	Mar 31, 2018	Overdue		-

To create a new invoice, click on the 'New' button in the top right (2):



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New invoice ✕

Client 1

Payers 2 + New

Genworth Life Ins Co ↓ ↑ ✎ 🗑
Limit: \$250.00
Policy number: A12345

Erin Doe ↓ ↑ ✎ 🗑

Timezone 🌐

Period starts 3 📅

Period ends 📅

Invoice date 4 📅


In the new invoice window, type in the name of the client to select from the drop down, (1) and then confirm that the payers are set up correctly (2). See the [CoActiveSoft Financial Management user manual](#) to set up payers and invoices. Next, specify the start and end date of the invoice period (3), and the invoice creation date (4). After creating a new invoice, CoActiveSoft automatically generates it (image from main invoices page):

Invoice date	Invoice total	Client	Due date	State	QB Sync
Jun 22, 2018	\$290.00	Deborah Baron	Jul 22, 2018	Draft	



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If you click on the invoice shown and then the edit button (), you can modify the information about an invoice before finalizing all the information to send out to clients and payers:

☰ Line items					
Description	Qty	UOM	Unit price	Amount	
Non-medical services [Sonia Balderon Wed 4/11/18 8:00 AM - Wed 4/11/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> 1 ↓ ↑ 3 × </div>
Non-medical services [Sonia Balderon Sat 4/14/18 8:00 AM - Sat 4/14/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> ↓ 2 ↑ × </div>
Non-medical services [Sonia Balderon Sun 4/15/18 8:00 AM - Sun 4/15/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Non-medical services [Sonia Balderon Wed 4/18/18 8:00 AM - Wed 4/18/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Non-medical services [Sonia Balderon Sat 4/21/18 8:00 AM - Sat 4/21/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Non-medical services [Sonia Balderon Sun 4/22/18 8:00 AM - Sun 4/22/18 11:00 AM]	3	Hours	\$30.00	\$90.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Subtotal:				\$540.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Paid by others (Erin Doe)	1		-\$290.00	-\$290.00	<div style="display: flex; justify-content: space-around;"> ↓ ↑ × </div>
Subtotal				\$250.00	

Move line items up (2), down (1), or delete them altogether (3).

For more information about line items, payers, and invoicing, consult the [CoActiveSoft Financial Management](#) manual.



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