

CoActiveSoft Caregiver Portal and Time Tracking User Manual

CoActiveSoft Caregiver Portal Overview

CoActiveSoft Caregiver Portal assists home care businesses by providing relevant information to caregivers and by tracking the time they spend working for a client. After logging into CoActiveSoft, providers see an interface that allows them to access their profile information (1), the messaging application (2), affiliated profiles (3), scheduling (4), and their current shifts (5):

Main Caregiver Login

For more information about CoActiveSoft messaging, see the [CoActiveSoft Messaging](#) user manual. After clicking on 'My Profile', caregivers can access their calendars (1), their editable profiles (2), scheduled shifts (3), assigned tasks (4) (see the [CoActiveSoft Task Management](#) user manual), requested and assigned service requests (5), credentials (6), and documents (7).



CoActiveSoft
Solutions for Service Providers

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

My Profile / Profile

Victoria Chan

Address: America/Los Angeles [Show on map](#)

Phone: (510) 769-7519

Mobile: ryan.olmstead@coactivesoft.com

Email: ryan.olmstead@coactivesoft.com

[Change password](#)

- Pre-Employment
- Scheduled Shifts **3**
- Assigned Tasks **4**
- Requested service requests **5**
- Assigned service requests
- Credentials **6**
- Documents **7**

Caregiver Portal main profile

Scheduled Shifts

The Scheduled Shifts section is the most important part of the CoActiveSoft Caregiver Portal. Clicking on it provides the caregivers with the schedule for the current months. The caregiver can view past (validated) (1), past scheduled (not validated) (2), current (3), and future (4) shifts:



CoActiveSoft
Solutions for Service Providers

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

Scheduled Shifts

From Sat 6/16/18 to Mon 6/25/18 Contact Agency

Shift 0002170
 Sue Adler
 ✓ Validated 9.00 Hours worked 1
 Sat 6/16/18 8:00 AM - Sat 6/16/18 5:00 PM
[Show details](#)

Shift 0002171
 Sue Adler
 Sun 6/17/18 8:00 AM - Sun 6/17/18 5:00 PM 2
[Show details](#)

Shift 0002172
 Sue Adler Stop
 ▶ Started 3
 Mon 6/18/18 8:00 AM - Mon 6/18/18 5:00 PM
[Show details](#)

Shift 0002173
 Sue Adler 4
 Tue 6/19/18 8:00 AM - Tue 6/19/18 5:00 PM
[Show details](#)

By clicking on the 'Show details' button, additional information about the shift can be displayed. This expanded view allows the caregiver to locate the client's location on google maps (1), add some notes to the shift (2), and return back to the previous view (3):

Shift 0002170
 Sue Adler 2
 ✓ Validated 9.00 Hours worked
 Sat 6/16/18 8:00 AM - Sat 6/16/18 5:00 PM
[Hide details](#)

Address 1

Timezone
 America/Los Angeles

Phone

Email
 ryan.olmstead@coactivesoft.com

Products
 Hourly Home Care 3

[Hide details](#)



CoActiveSoft
 Solutions for Service Providers

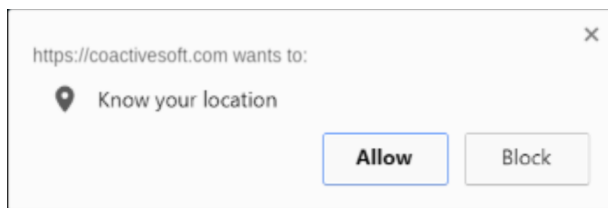
- > info@coactivesoft.com
- > 206-248-1884
- > 2115 SW 152nd Street, Seattle WA 98166

Time Tracking Overview

For any business that provides services at a client's residence, time tracking is a challenge. CoActiveSoft solves that challenge in a couple of ways. CoActiveSoft makes it easy for caregivers to log in and out at the beginning of the shift, and, alternatively, CoActiveSoft allows providers to scan a QR code at a client's home which works much like punching a time card.

Time Tracking through the Caregiver Portal

Of course, a caregiver could easily access CoActiveSoft from home and click the Start Shift button without showing up at the client's home. To prevent cheating, CoActiveSoft captures the location of the computer or mobile device from which the Start Shift button was Clicked. To allow CoActiveSoft to do so, the user needs to click the Allow button when prompted to do so:



Under the caregiver's scheduled shifts section, it is possible to start and stop shifts using the respective buttons. The start shift button (▶) will only be shown for a shift 4 hours in advance. This is done so that caregivers don't mistakenly start the wrong shift or get clocked for hours they did not work. Clicking on the stop button (■) will stop the timer and mark the end of the shift.

Time Tracking Through Telephony

With CoActiveSoft, it is possible to clock in and out of shifts using the client's phone. It is not possible for caregivers to use telephony with their own phones, since that would make it easy to start and end shifts without being at the client's home.

Before using telephony, a few things have to be in place.

1. The client must have a working home phone or cell phone



CoActiveSoft
Solutions for Service Providers

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

2. This phone number must be saved in the client's profile in any reasonable format:

202-555-0174 12025550174 (202) 555 0174 (202)555-0174

3. The caregiver must have a phone number in their profile as well. They will enter this number to identify who they are.
4. Telephony must be used 30 minutes at most before a scheduled shift and at the latest 30 minutes after a scheduled shift. After this period of time, the supervisor or administrator must manually edit the worked times.
5. For more information on how to properly set up and use telephony, refer to the Telephony Management user manual. For more information on profiles or scheduling, refer to the Profile Management user manual and the Schedule Management user manual.

As a caregiver, it is simple to use telephony:

1. Go to your scheduled shift.
2. Dial the CoActiveSoft telephony number, +14259708558, using the CLIENT's phone.
3. After being prompted, enter in your own personal phone number (at least 7 digits) using the phone's number pad, followed by the # sign.
4. You will be informed whether or not you were properly clocked into your shift. Each call will clock you in or out of the current shift you are scheduled for (30 minutes before the start time, during the shift, or 30 minutes after the end time).

Time Tracking with QR Codes

CoActiveSoft Time Tracking provides a third method to mark the start and end of a shift. Besides clicking the start and stop button or using telephony, providers can also scan a QR code at the client's home. For this process to work, the agent needs to print out the QR code and deposit it at



CoActiveSoft
Solutions for Service Providers

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

the client's home, perhaps by attaching it to the refrigerator with a magnet. The QR code can be found in the reporting section of the main menu:

The screenshot shows the CoActiveSoft web application interface. On the left is a dark blue sidebar menu with the following items: My Profile, Dashboard, Messaging, Profiles, Scheduling, Administration, Accounting, Reporting, Revenue visual, Client hours visual, Client hours report, Caregiver hours visual, Caregiver hours report, Expiring credentials, Re-Admission report, Re-Admission visual, Referral visual, Sales credit visual, Access codes (highlighted with a red box), and Settings. The main content area is titled 'Reporting / Access codes' and features a 'Profiles' section with a search bar and a dropdown menu for 'All tags'. Below this, there are four profile cards arranged in a 2x2 grid. Each card contains a profile picture, the name, and two QR codes labeled 'Start shift' and 'End shift'. The profiles shown are Sue Adler, Deborah Baron, John Doe, and Brian F. Enno.



CoActiveSoft
Solutions for Service Providers

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

To print out a sheet of paper with the QR code, search for a client in the list using the search bar, and click the download button:

The screenshot shows the 'Profiles' section of the CoActiveSoft interface. At the top, there is a search bar with 'All tags' and a dropdown arrow, followed by a search input field containing 'sue adler' and a magnifying glass icon. To the right of the search bar is a download button (a square with a downward arrow) highlighted with a red border. Below the search bar is a profile card for 'Sue Adler'. The card features a photo of an elderly woman with white hair. Underneath the photo are two sections: 'Start shift' with a QR code, and 'End shift' with another QR code. At the bottom of the interface, there is a pagination bar with a left arrow, the number '1' in a dark blue box, and a right arrow.

At the beginning and end of a shift, the caregiver can use their camera app (or a QR code specific one) to scan the corresponding QR code at the client's house. CoActiveSoft will record the shift duration as if the provider clicked the Start and Stop buttons on the relevant shift.



CoActiveSoft
Solutions for Service Providers

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