

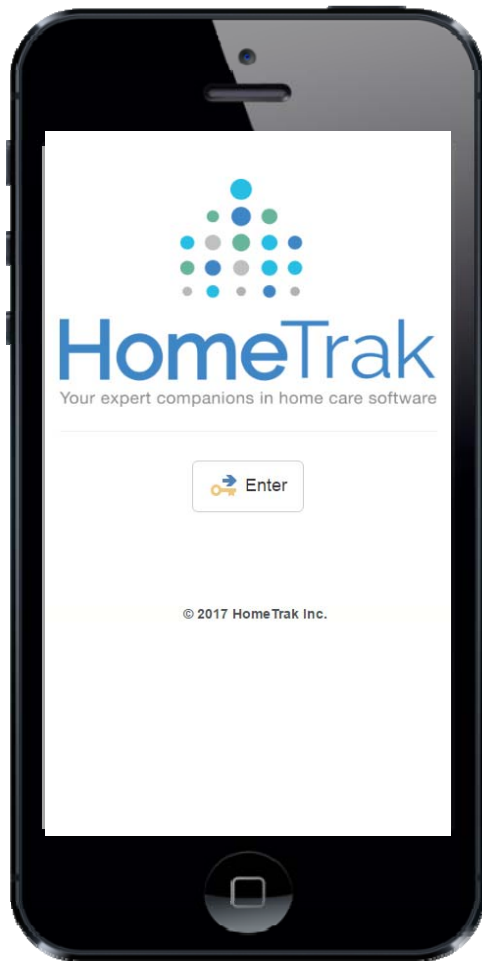


HomeTrak

Your expert companions in home care software

HomeTrak Online

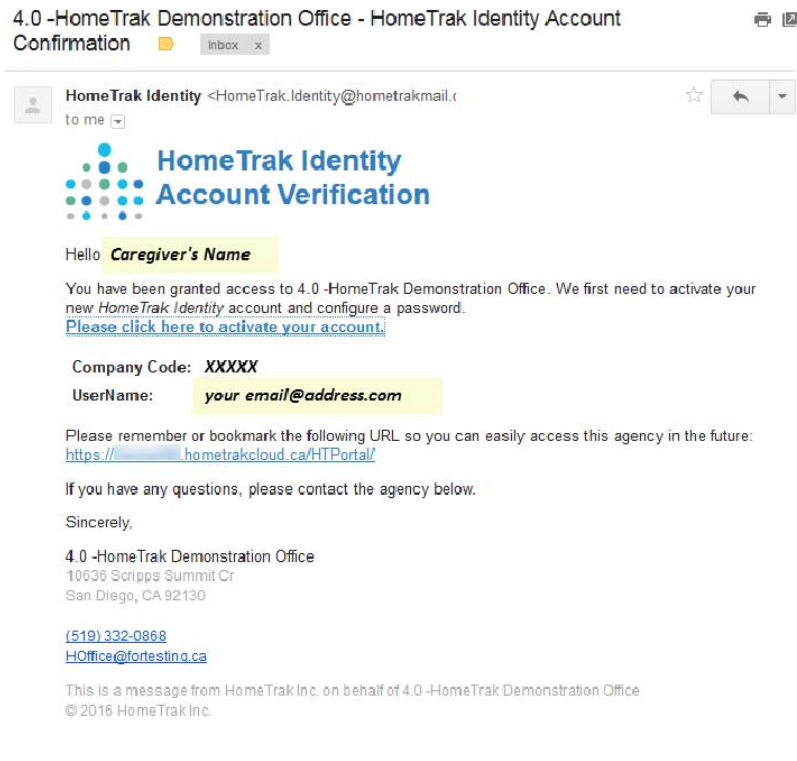
For Caregivers



HTOnline for Caregivers

- HomeTrak Online is a web portal that can be accessed from your phone, tablet or computer.
- You can see your Calendar of schedules in an *Agenda*, *Weekly* or *Monthly* view.
- You can see your schedule details, start/end times, length of schedule, client's name and address.
- You can see the *Duties to Perform* you need to complete during your schedule.
- You can write a *Care Note* to communicate information back to the office.
- You can capture the *Client's Signature* and your signature for each schedule worked.
- You have access to *Saved Reports*, like the client's care plan.
- If you've been given access, you can add your *Availability*.

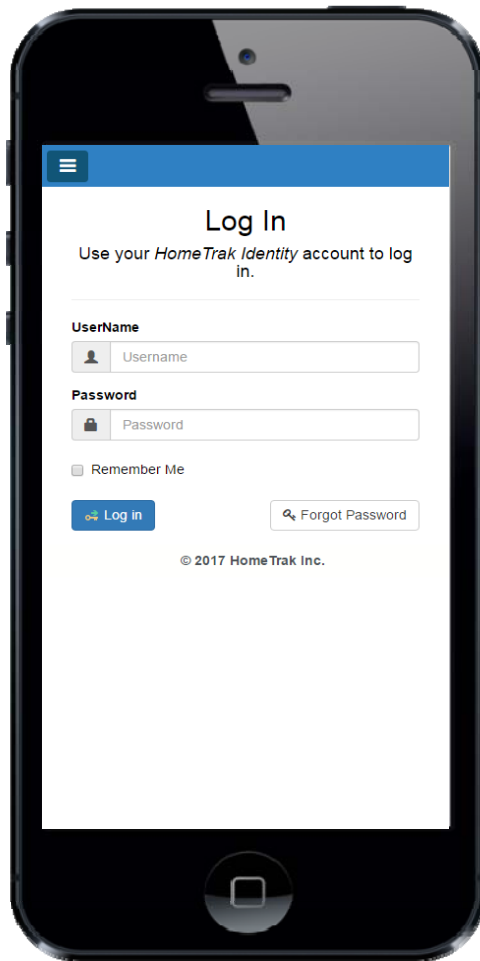
Getting Started



Account Activation

- You will receive an email from **HomeTrak Identity** which asks you to click on the link to activate your account.
- The **Create Password** screen will appear. Your *Username* is your email address and will already be populated for you. Enter your *Password* in the password and confirm password fields, then click **Change Password** to save.
- The **Log In** screen will appear.

Log in



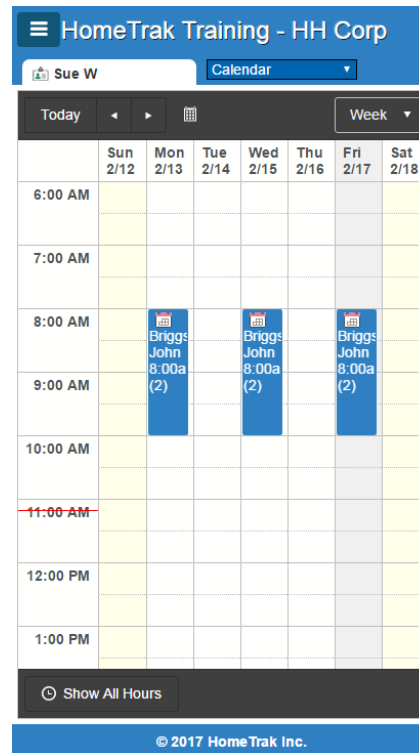
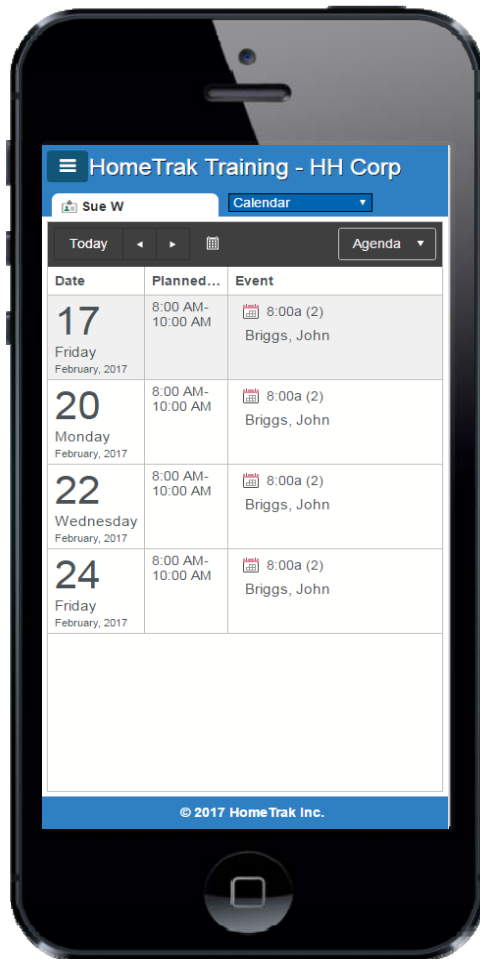
Log In Screen

- The **Log In** screen can be accessed from your phone, tablet or computer using a web browser such as Chrome, Firefox or Safari if using an iOS (Apple) device.
- Type in your *Username* and *Password* then click Log In button.
- If located in the *USA* use the website <https://www.hometrakcloud.com/>.
- if located in *Canada* use the website <https://www.hometrakonline.ca/>.
- Add the website to the home page of your phone or tablet: [click here for instructions](#). Or add to your *Favorites* if working on a computer.

Calendar Views

- Once logged in, you will see an **Agenda** view of schedules on your calendar.
- Change the view to **Week** or **Month** by clicking on the Agenda drop-down menu.

[Click here for instructions on using the Calendars.](#)



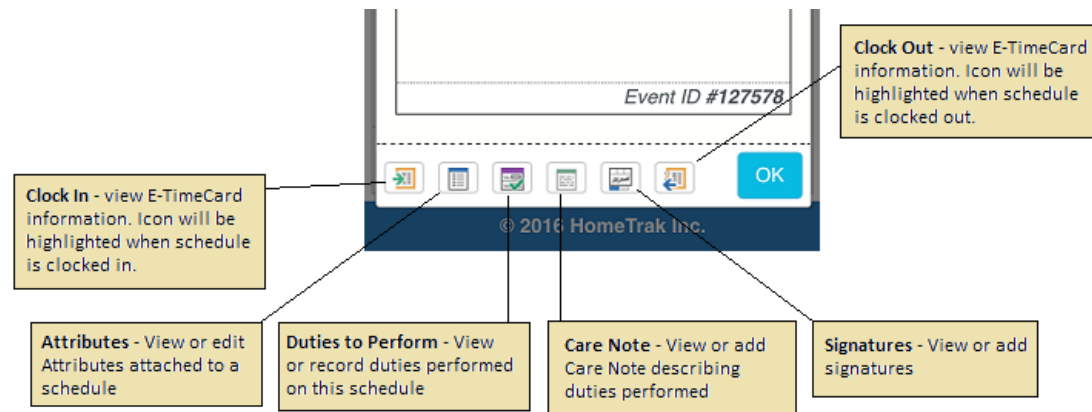
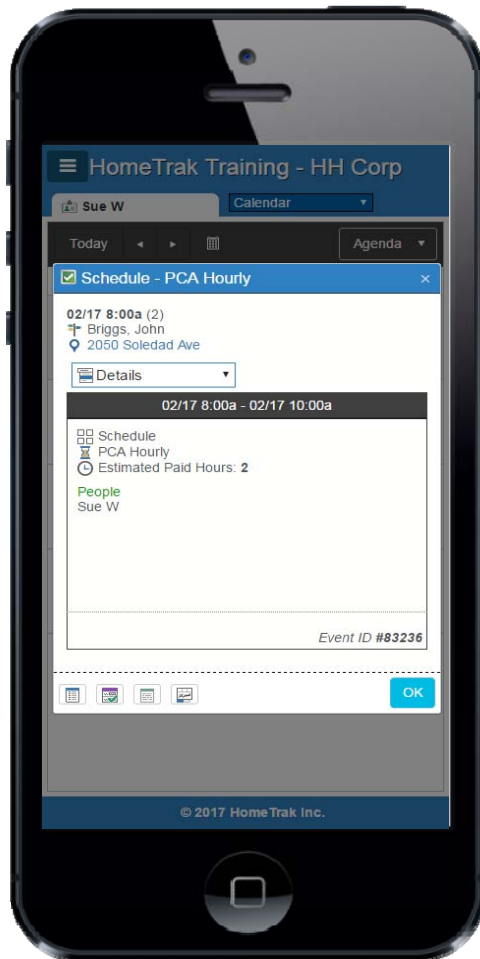
Schedules

From any of the Calendar views you can tap a schedule to see the details.

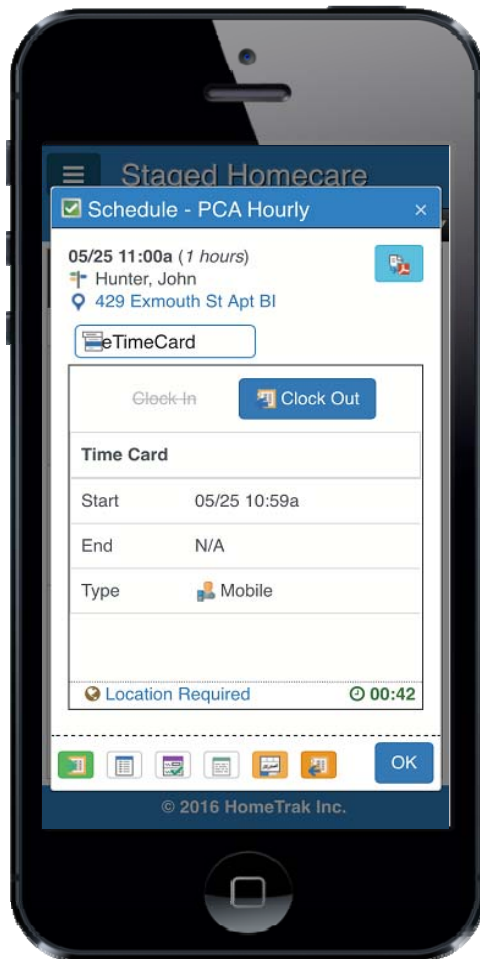
Schedules Details:

- Date, Start/End Time and Hours (length of schedule)
- Client's Name and Address (tap the address to get mapping details)
- Type of work you are performing. This example shows PCA Hourly.
- Estimated Paid Hours

Below is a close up view of the bottom of the schedule with explanation of the buttons:



Clock In & Out for Schedules

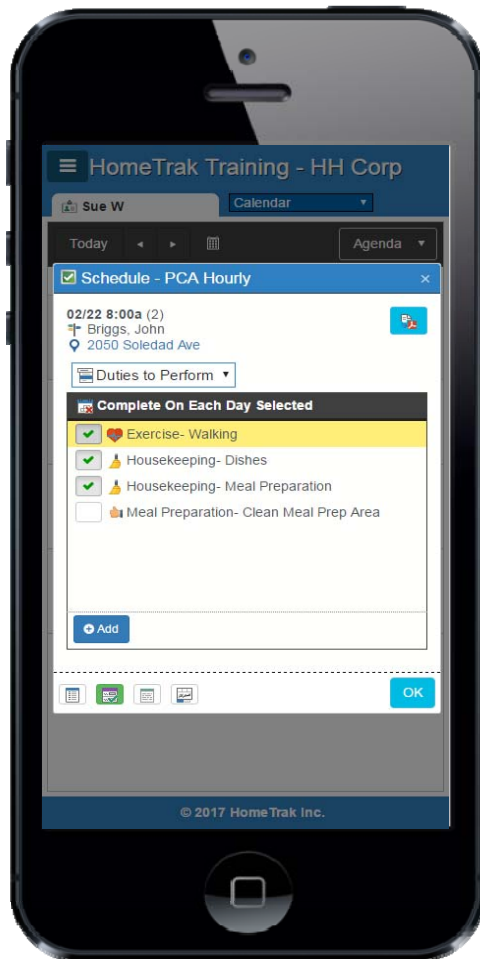


- From any of the Calendar views, you can tap a schedule to clock in or out.
- Your *GPS* or *Location Services* needs to be enabled on your device. To verify this is working, open your maps app and make sure that it shows a pin at your current location.

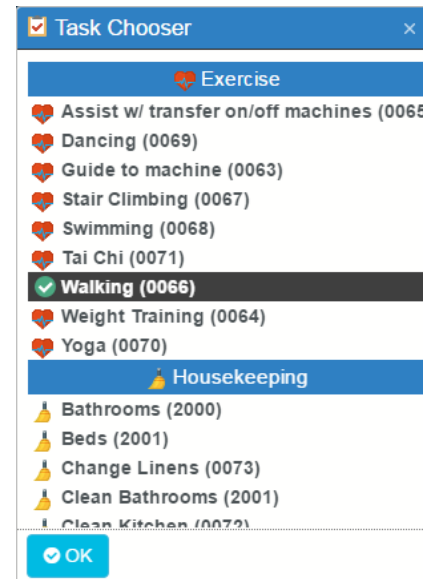
Troubleshooting:

- When starting or ending a visit, if you receive an indication that you are not close enough to the location ("xx meters/yards out of range"), try moving to the front door, or stepping outside of the building to get a clear signal and refresh your location.
- If one or both of the Clock In or Clock Out options is not visible, you may be too far from the original scheduled time of the schedule. You may need to contact your office to adjust the schedule time in this case.

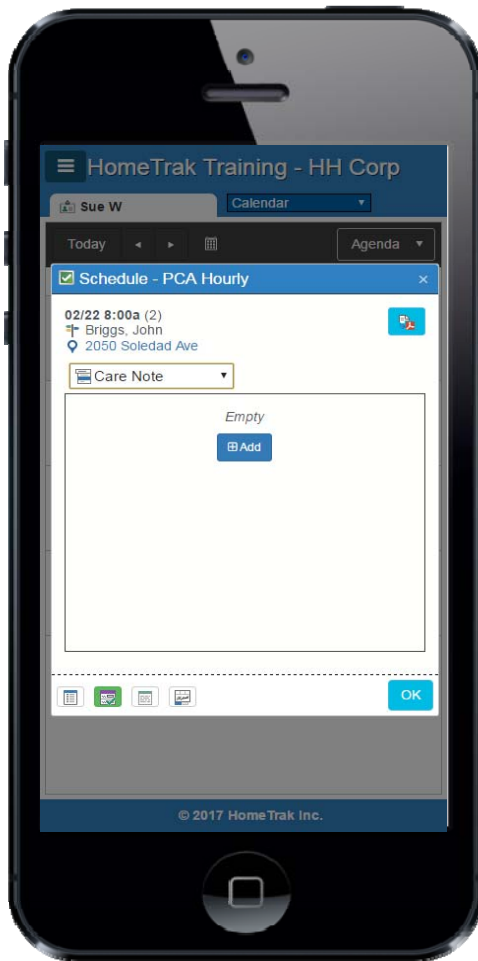
Check off Duties to Perform



- From any of the Calendar views you can tap a schedule then tap the *Details* drop-down menu and tap **Duties to Perform**.
- Tap the box beside each task to show you've completed the task.
- Click the Add button to open the **Task Chooser** screen.
 - Scroll through the list and tap each task you have completed to add to the current list.
- The list will be attached to the schedule and visible to the Office Staff



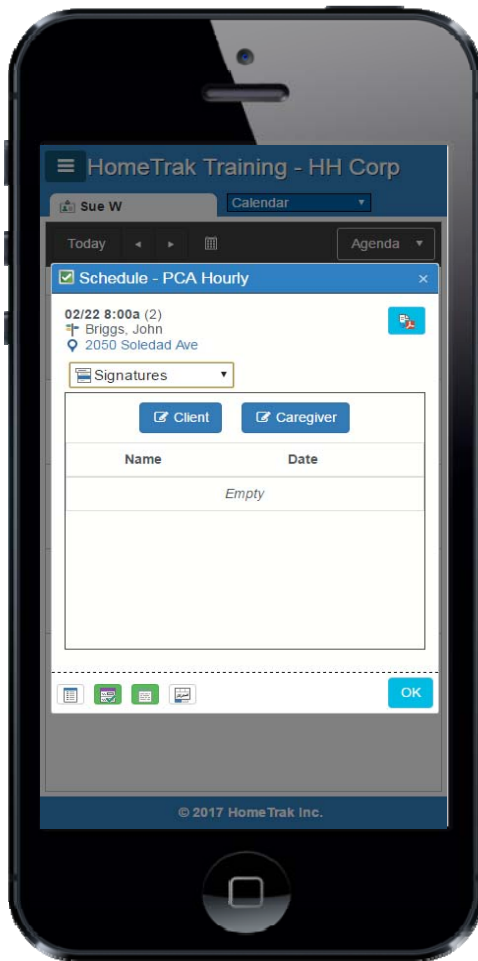
Add Care Note



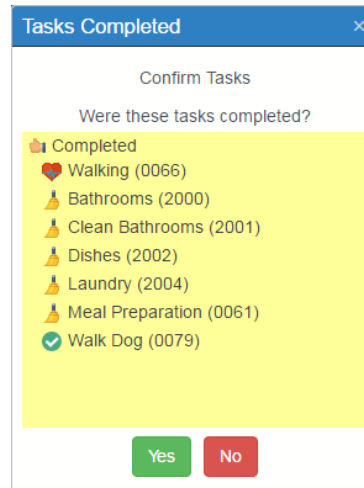
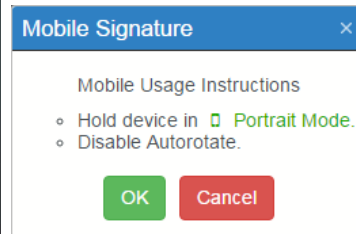
- From any of the Calendar views you can tap a schedule then tap the *Details* drop-down menu and tap **Care Note**.
- Click the **Add** button to open the Care Note screen.
 - Type in a brief note, then click **Save**.
- The note will be attached to the schedule and visible to the Office Staff.

A screenshot of the 'Care Note' dialog box. The dialog has a blue header with the title 'Care Note' and a close button (X). Below the header, the text 'Care Note' is displayed above a text input field. The input field contains the text 'John had a great day. Enjoyed his walk.'. At the bottom of the dialog, there are two buttons: a blue 'Save' button with a document icon and a white 'Cancel' button with a close icon.



Capturing Signatures

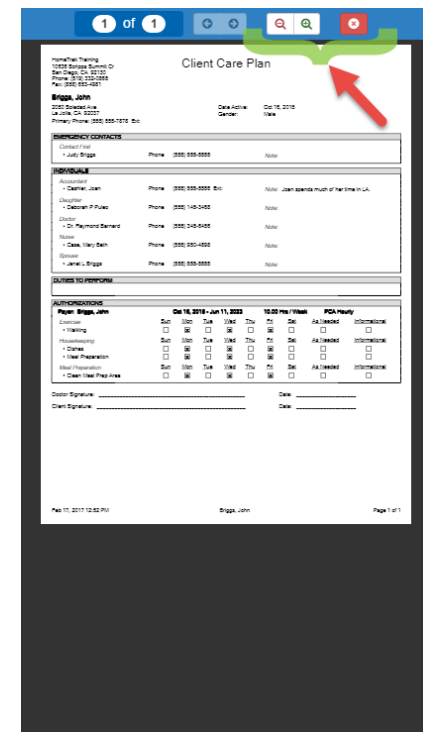
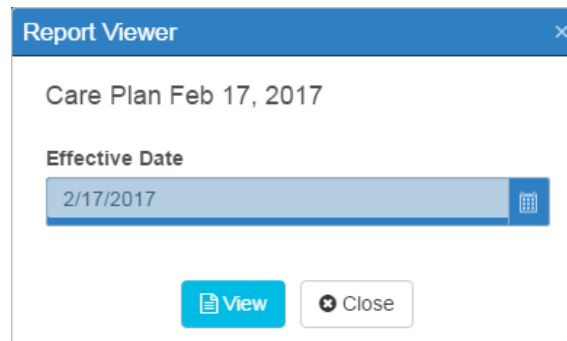
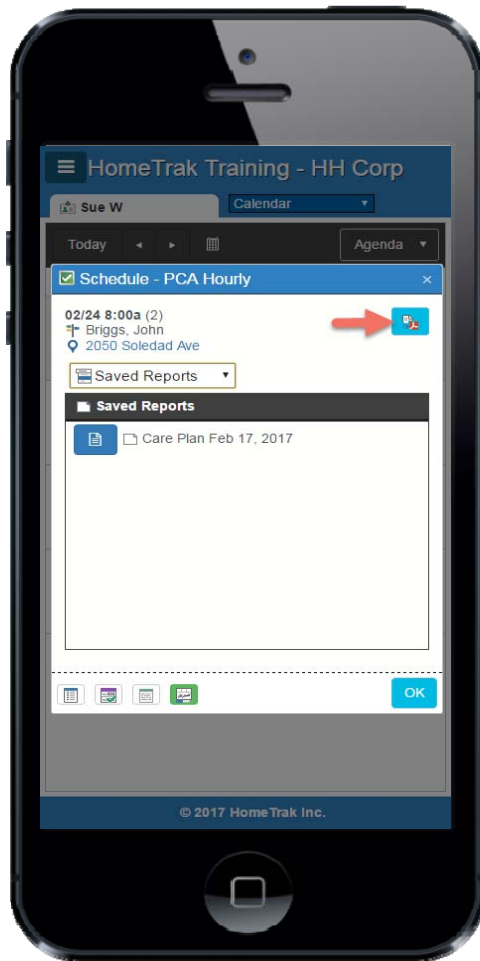


- From any of the Calendar views you can tap a schedule then tap the *Details* drop-down menu and tap **Signatures**.
- Click the **Client** button to open the **Mobile Signature** screen.
 - Click *OK*, the Tasks Completed screen appears. Client will click *Yes* or *No*.
 - If they click *Yes*, the signature screen opens for them to sign. Click *Save*. Repeat steps for Caregiver's signature if required. If not, click *OK*.
- The signatures will be attached to the schedule and visible to the Office Staff.



Saved Reports

- From any of the Calendar views you can tap a schedule then tap the *Details* drop-down menu and tap **Saved Reports**.
- Click the **Report** icon to open the **Report Viewer** screen. 
- You then can use the icons on the report toolbar to zoom in or out and close the report. 





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