Care Platform User Manual

Introduction

Welcome to the Care Platform User Manual! This guide will help you navigate the features and functionalities of the Care Platform to manage client care, caregiver schedules, billing, and compliance effectively.

Getting Started

Installation and Initial Setup

To get started, download the Care Platform installer from our website. Follow the on-screen instructions to complete the installation. Once installed, open the application and follow the setup wizard to configure your account settings.

Navigating the User Interface

The dashboard provides quick access to key features such as client management, caregiver scheduling, and billing. Use the main navigation menu to switch between different sections.

Managing Client Profiles

Adding and Editing Client Information

To add a new client, go to the 'Client Management' section and click 'Add New Client.' Enter the client’s details, including name, contact information, and care preferences. To edit existing profiles, select the client from the list and update the necessary fields.

Creating and Managing Care Plans

Navigate to the 'Care Plans' tab to create customized care plans. Assign tasks and set goals based on the client’s needs. Update plans as required and monitor progress through the care plan dashboard.

Viewing Client History

Access the 'Client History' section to review past interactions, care notes, and service history. This information is crucial for providing consistent and personalized care.

Scheduling and Caregiver Assignment

Setting Up Schedules

In the 'Scheduling' section, you can create shifts and assign caregivers. Use the calendar view to set up recurring schedules and manage changes.

Assigning Caregivers

To assign a caregiver, select the client and choose a caregiver from the list based on their availability and skills. Ensure that shifts are aligned with caregiver qualifications.

Managing Shift Changes and Absences

If a caregiver needs to change their shift or report an absence, update the schedule accordingly and notify relevant parties to avoid service disruptions.

Billing and Invoicing

Generating Invoices

Go to the 'Billing' section to generate invoices for services rendered. Customize invoice templates and include relevant client and service details.

Tracking Payments

Monitor payment status in the 'Payments' tab. Record received payments and manage outstanding balances efficiently.

Managing Accounts Receivable

Use the accounts receivable module to track unpaid invoices and follow up with clients as necessary.