

USER'S MANUAL

HOME CARE CLIENT
PROFILING AND PLANNING



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1. Introduction

The **Home Care Client Profiling and Planning System** desktop application is designed to streamline the case management process for home care providers. It allows case managers, client services officers (CSOs), and system administrators to manage client profiles, create care plans, manage budgets, and generate reports.

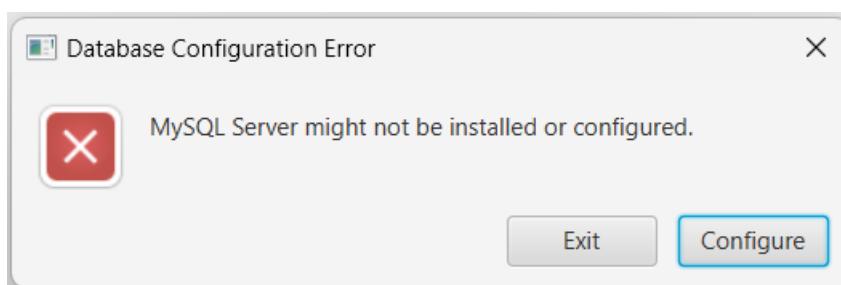
2. System Requirements

Before installing the desktop application, ensure that your system meets the following requirements:

- **Operating System:** Windows 10/11 later
 - **Processor:** Intel Core i5 or equivalent
 - **Memory:** 8 GB RAM
 - **Storage:** 500 MB available space
 - **Additional Software:** Java Runtime Environment (JRE), .NET Framework (for Windows users)
 - **Internet Connection:** Required for synchronization and updates
-

3. Execute and Configure

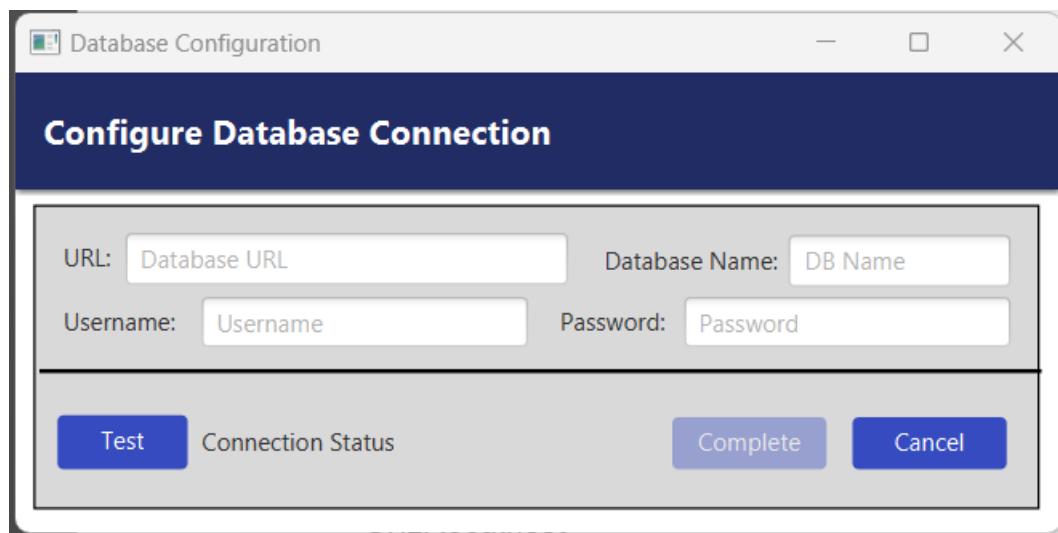
1. Open the software ([HomeCare.exe](#))
2. Wait until the components are fully established.
3. Once the initialisation is complete provide the database configuration details (only on first run). These are MySQL details which should be available upon successful installation of the same.



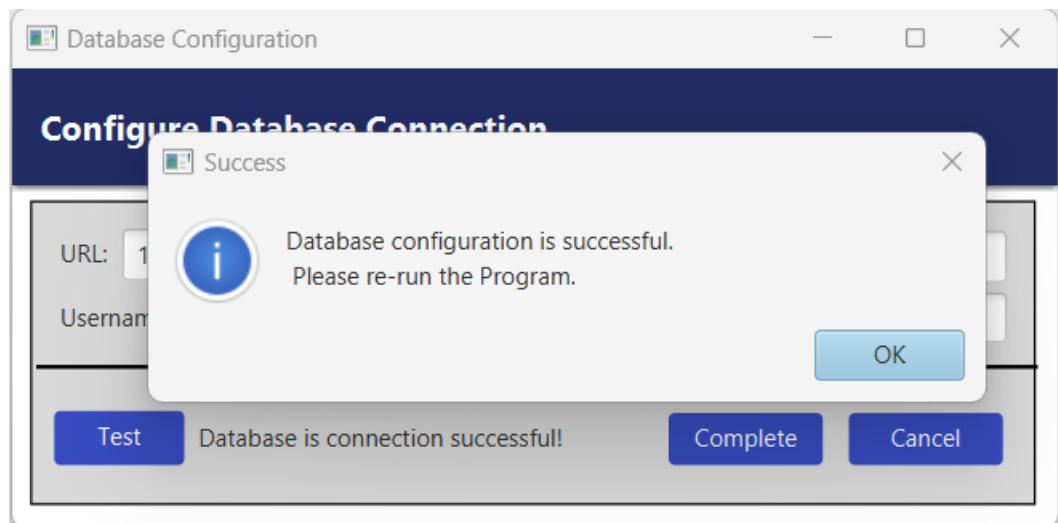
Default Settings

URL: localhost

Database Name: HCP_PBP
Username: <your username>
Password: <yourpassword>



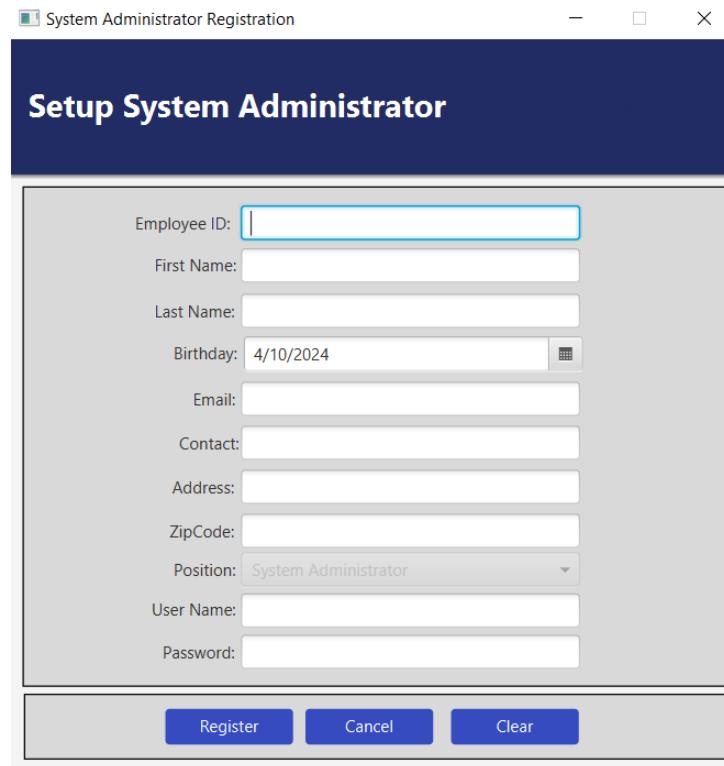
4. Test the Database connection by pressing Test Button.
5. When successful, click on complete and follow the on-screen instructions. If failed, double check the provided Database credentials.



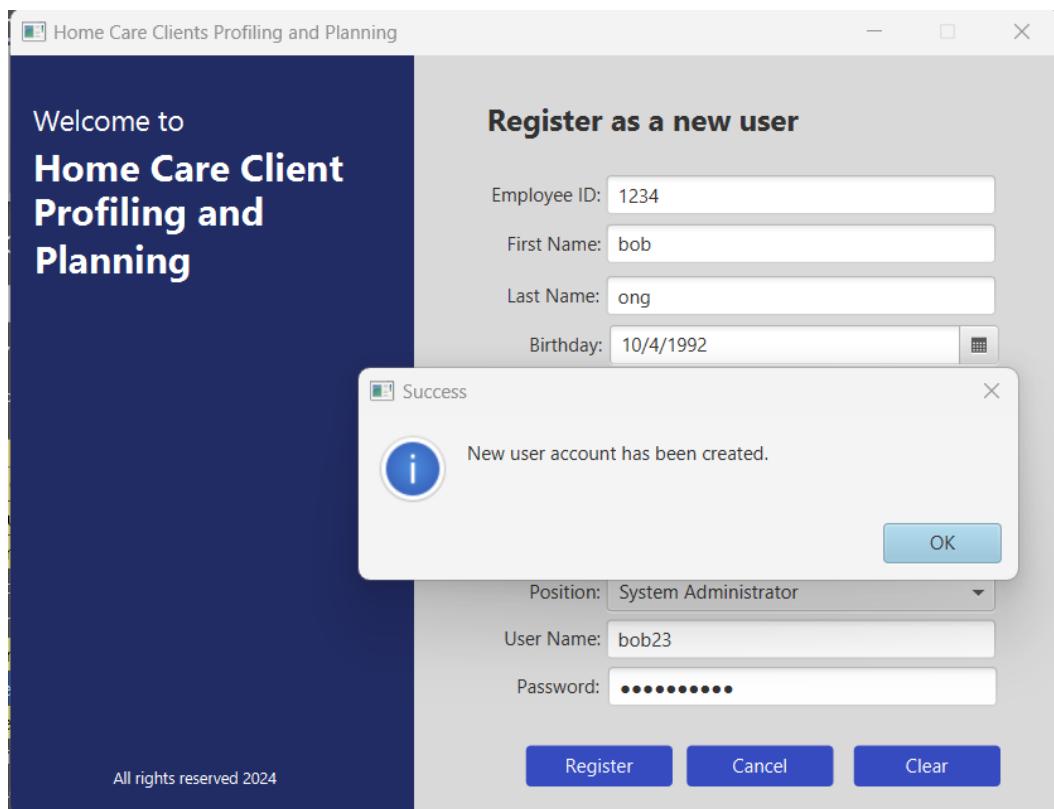
4. Logging in to the Application

System Administrator Registration and First-Time Login

- After the successful configuration and system verification, prompt will require registration of the **System Administrator** who will be responsible for registering and setting up an account first before other users can log in.

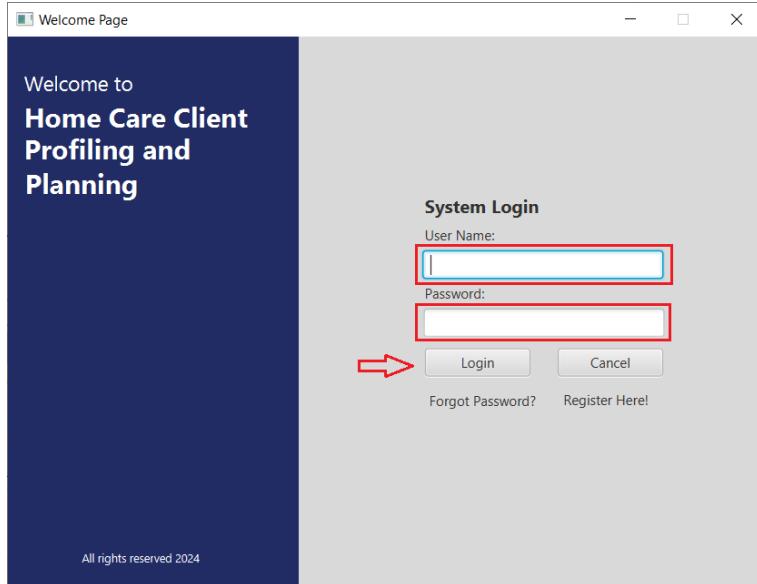


- Fill all the fields and click on Register. Follow the on-screen validation prompts until the successful registration. Once registered, this automatically leads to system login



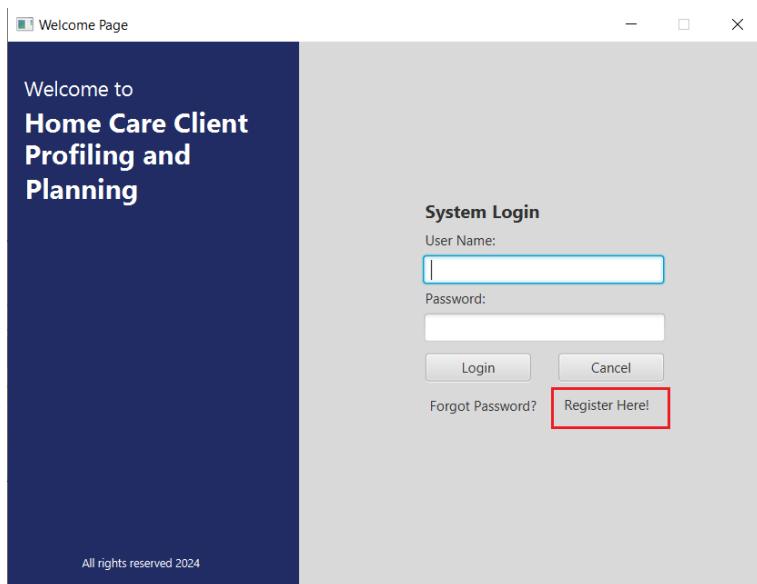
Subsequent Logins

1. Open the application and enter your credentials.
2. Click **Login** to access the dashboard.

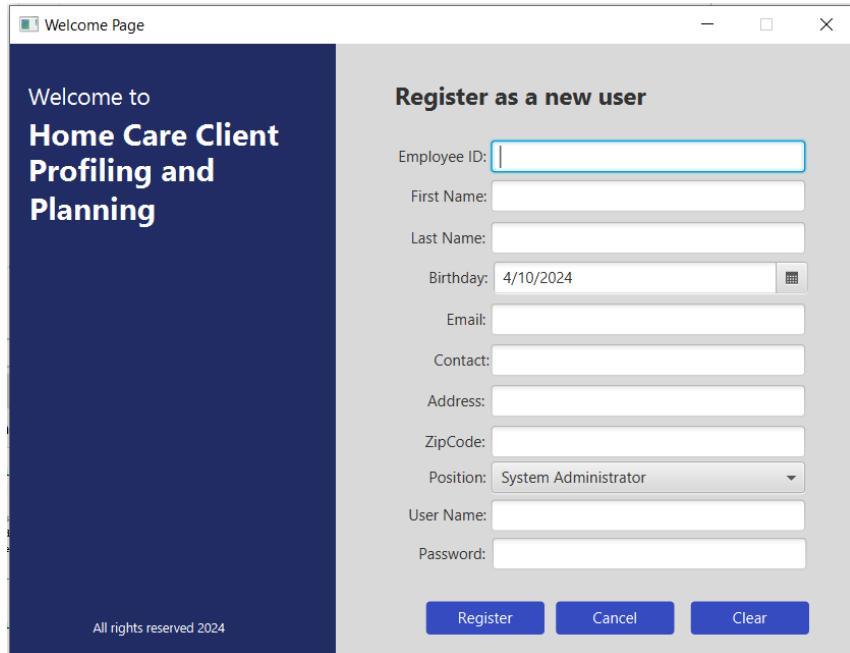


Subsequent User Registration

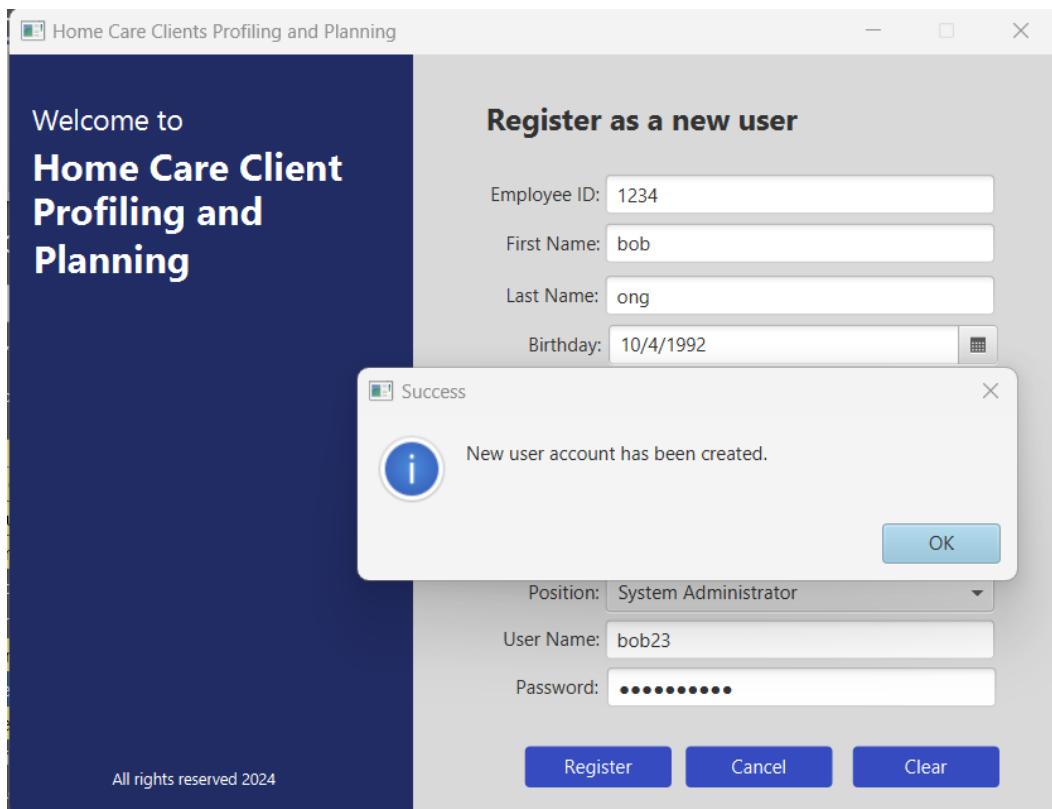
1. On the **Welcome Screen**, click **Register Here!**.



2. Enter the required details and follow the validation prompts.



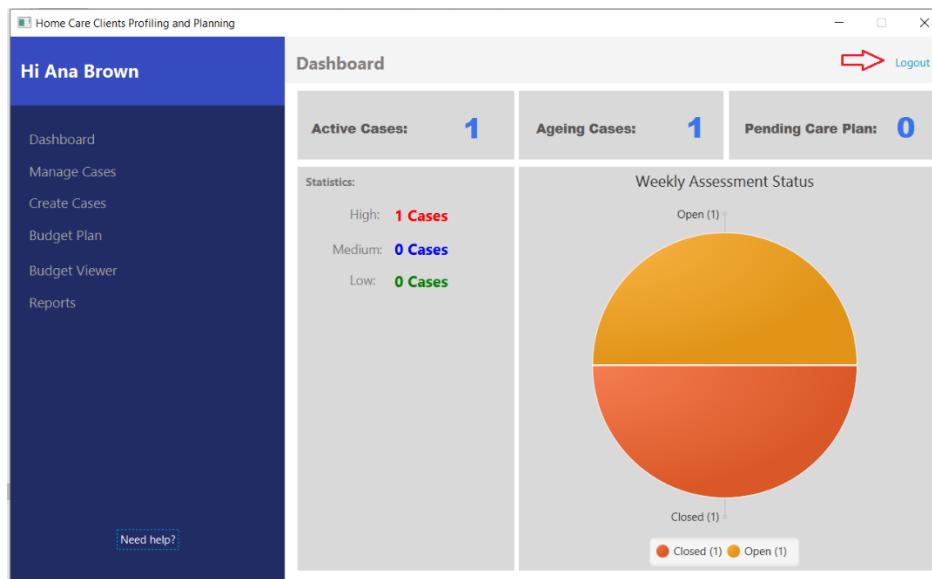
3. Once the account details are submitted, the system will generate a **new account** which can be used to navigate the system depending on the user role.



4. Log in using the newly created credentials to access the system.

Logging out

1. Click on the Logout link in the top-right corner of the dashboard.
2. Select **Logout** to securely end your session.



Forgot Password

1. To reset the password, request a onetime token from the System Administrator. Once the one time token has been generated by the System Administrator. Click on the Forgot Password and provide the required fields.

The screenshot shows the Services Offered application. In the foreground, a modal dialog box titled 'Reset Password' is open, containing fields for 'User Name', 'Verification Code', and 'New Password', along with 'Reset' and 'Cancel' buttons. In the background, a 'Login' window is visible with fields for 'Username' and 'Password', and buttons for 'Login' and 'Cancel'. Below the login window, there are links for 'Forgot Password?' and 'Register Here!'. The bottom of the screen displays a dark blue footer with the text 'All rights reserved 2024'.

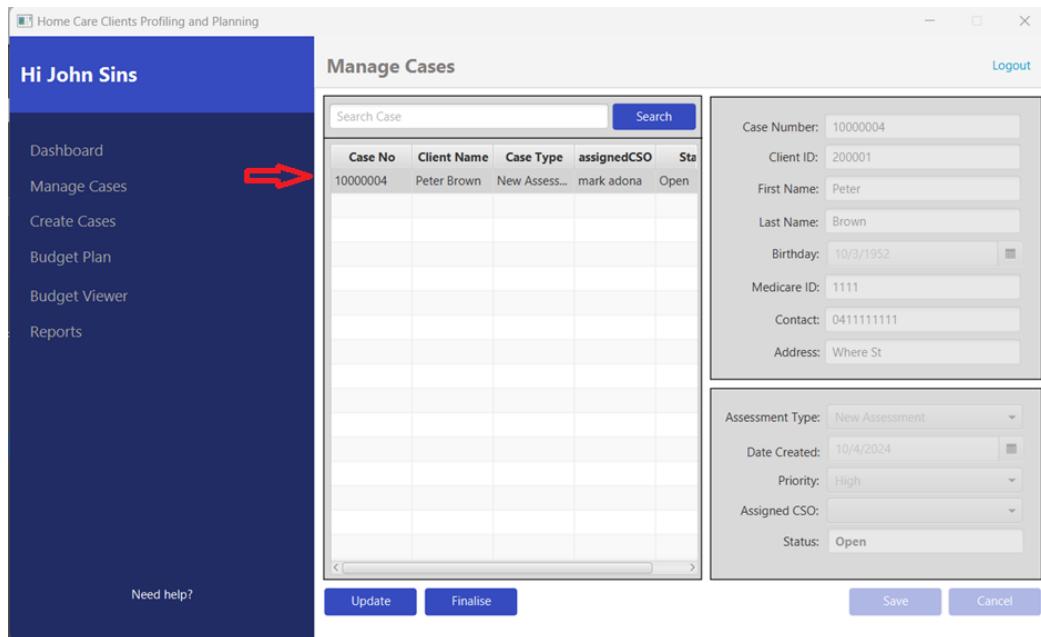
2. Click Reset to confirm the details and follow the on-screen instructions and confirmations.

5. User Roles and Responsibilities

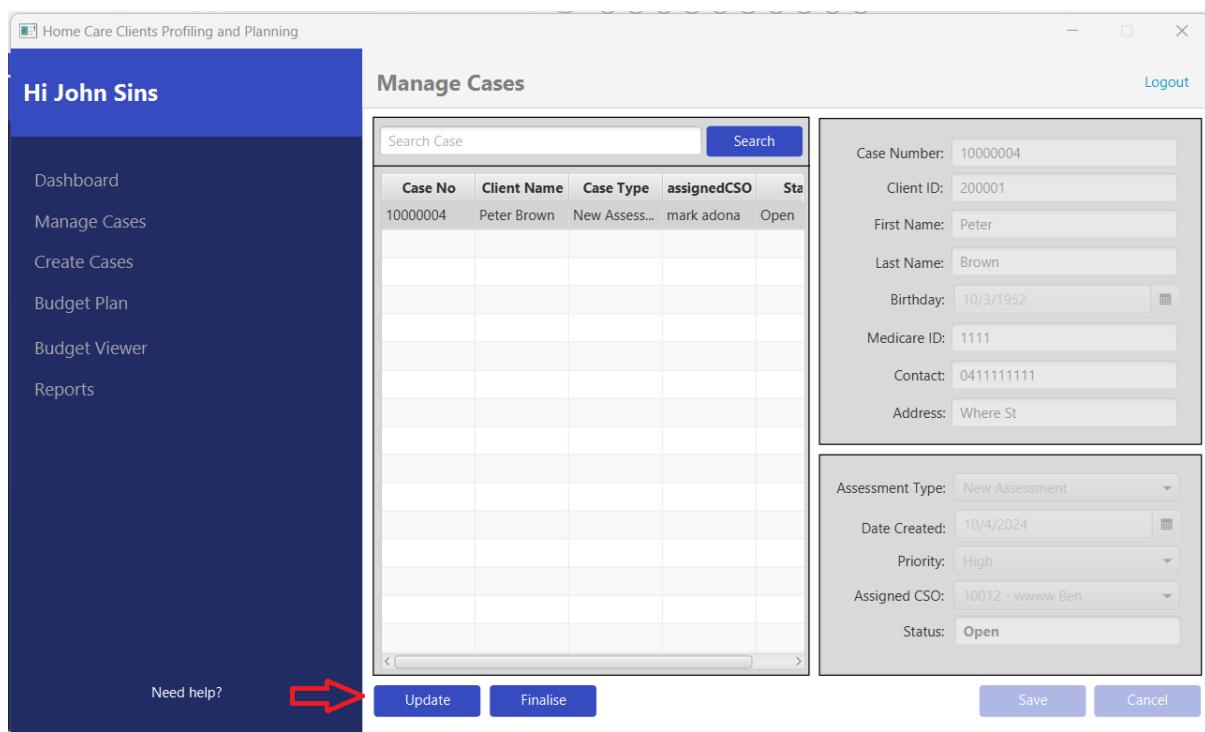
5.1 Case Manager

- **Case Management**

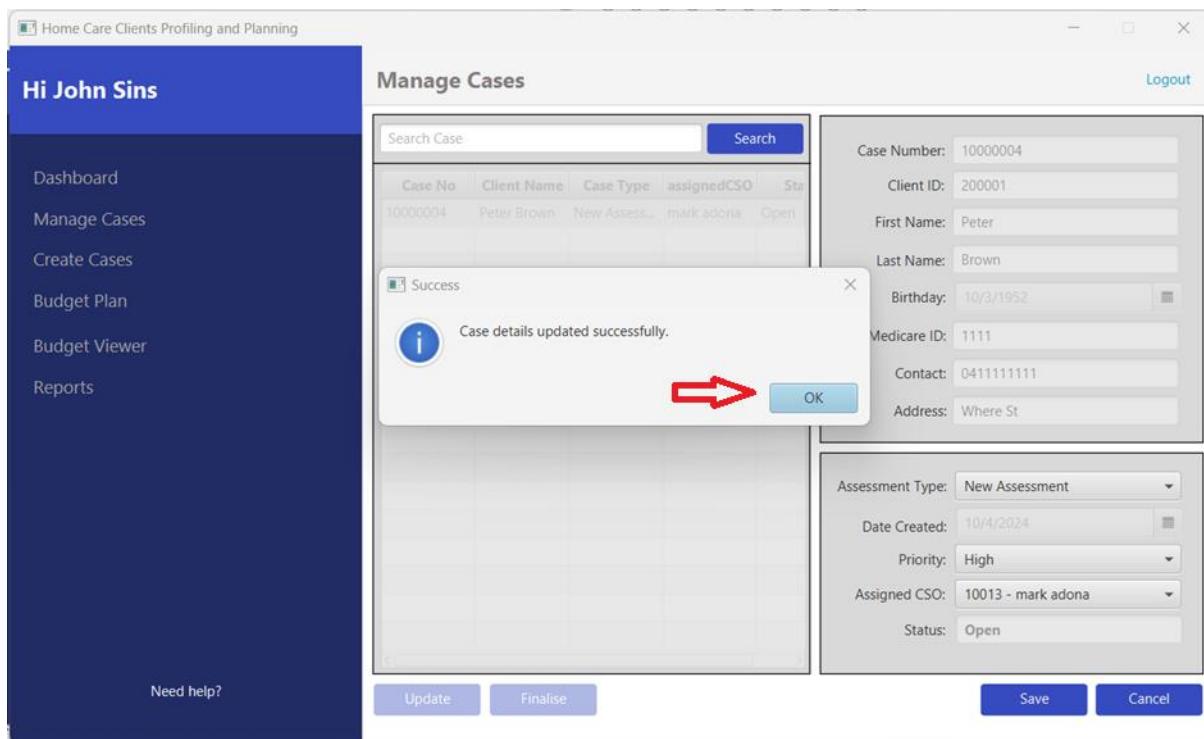
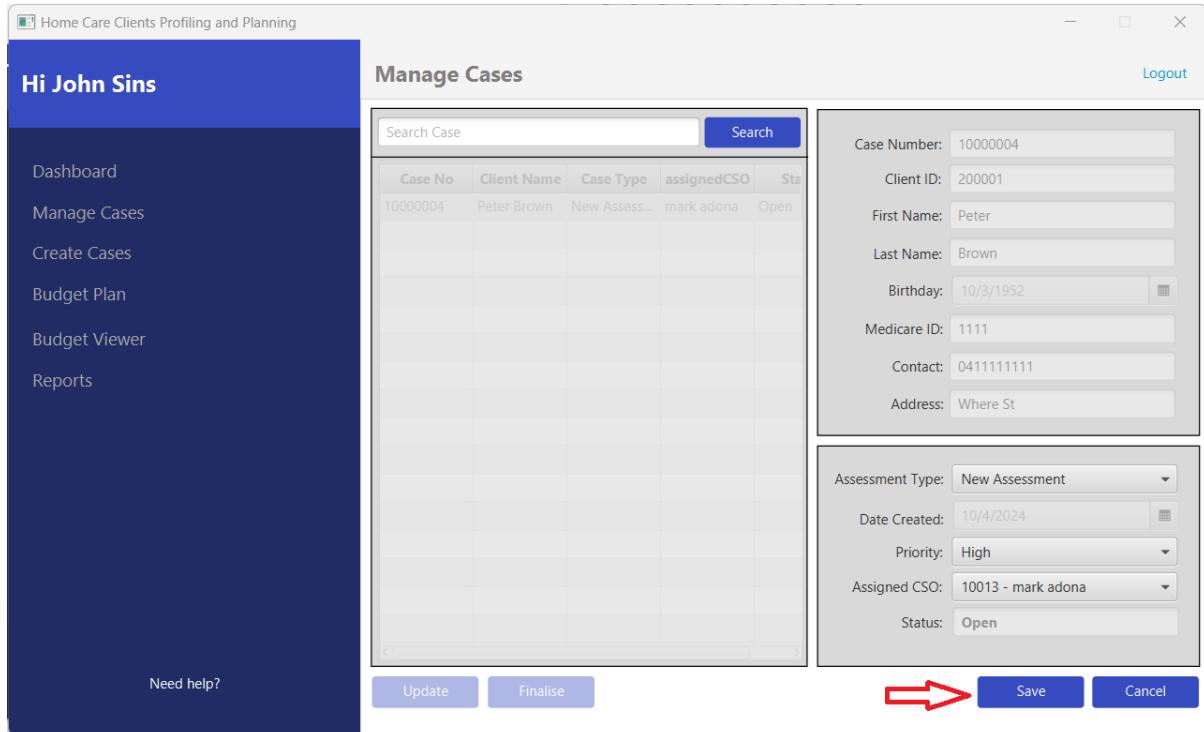
1. To manage the cases, navigate to Manage Case and select a case that you wish to manage.



2. To update the Case Assignment, Priority Level and Assessment Type, click on the Update Button.



3. Change as necessary then click on save to complete. Confirmation dialog will prompt.



4. To Create Care Plan / Generate Care Plan, select a case from the table and click on Finalise Button. This will open a new window that will automatically generate a care plan.

Home Care Clients Profiling and Planning

Hi John Sins

Logout

Dashboard

Manage Cases

Create Cases

Budget Plan

Budget Viewer

Reports

Need help?

Manage Cases

Search Case

Case No Client Name Case Type assignedCSO Status

10000004	Peter Brown	New Assess...	mark adona	Open

Update Finalise 

Save Cancel

Case Number: 10000004
Client ID: 200001
First Name: Peter
Last Name: Brown
Birthday: 10/3/1952
Medicare ID: 1111
Contact: 0411111111
Address: Where St

Assessment Type: New Assessment
Date Created: 10/4/2024
Priority: High
Assigned CSO:
Status: Open

HCP - Care Planning

Client: Peter Brown

Case No: 10000004
AssessmentID: 2024000005
Client ID: 200001
Medicare: 1111
Date: 10/4/2024
Venue: Physically At Home
Address: Where St

Generate
Cancel
Confirm and Submit

Comprehensive Care Plan

This comprehensive care plan is based from the completed assessment of the client .
Details of the sam can still be edited to include mo detailed approach of care service.

Goals Action

5. In the new window, click on Generate Button. This automates the generation of care plan. After generating, it will be enabled to allow updates from the user.

HCP - Care Planning

Client: Peter Brown

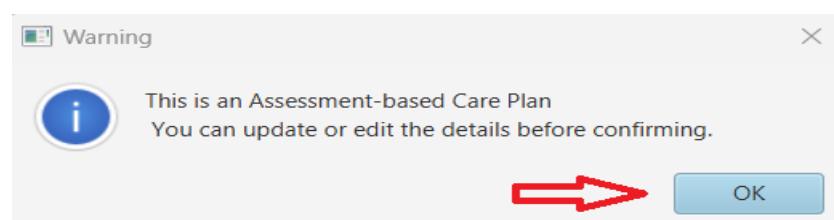
Case No:	10000004
AssessmentID:	2024000005
Client ID:	200001
Medicare:	1111
Date:	10/4/2024 <input type="button" value="Calendar"/>
Venue:	Physically At Home
Address:	Where St

Generate  **Cancel** **Confirm and Submit**

Comprehensive Care Plan

This comprehensive care plan is based from the completed assessment of the client . Details of the sam can still be edited to include mo detailed approach of care service.

Goals	Action



HCP - Care Planning

Client: Peter Brown

Case No:	10000004
AssessmentID:	2024000005
Client ID:	200001
Medicare:	1111
Date:	10/4/2024 <input type="button" value="Calendar"/>
Venue:	Physically At Home
Address:	Where St

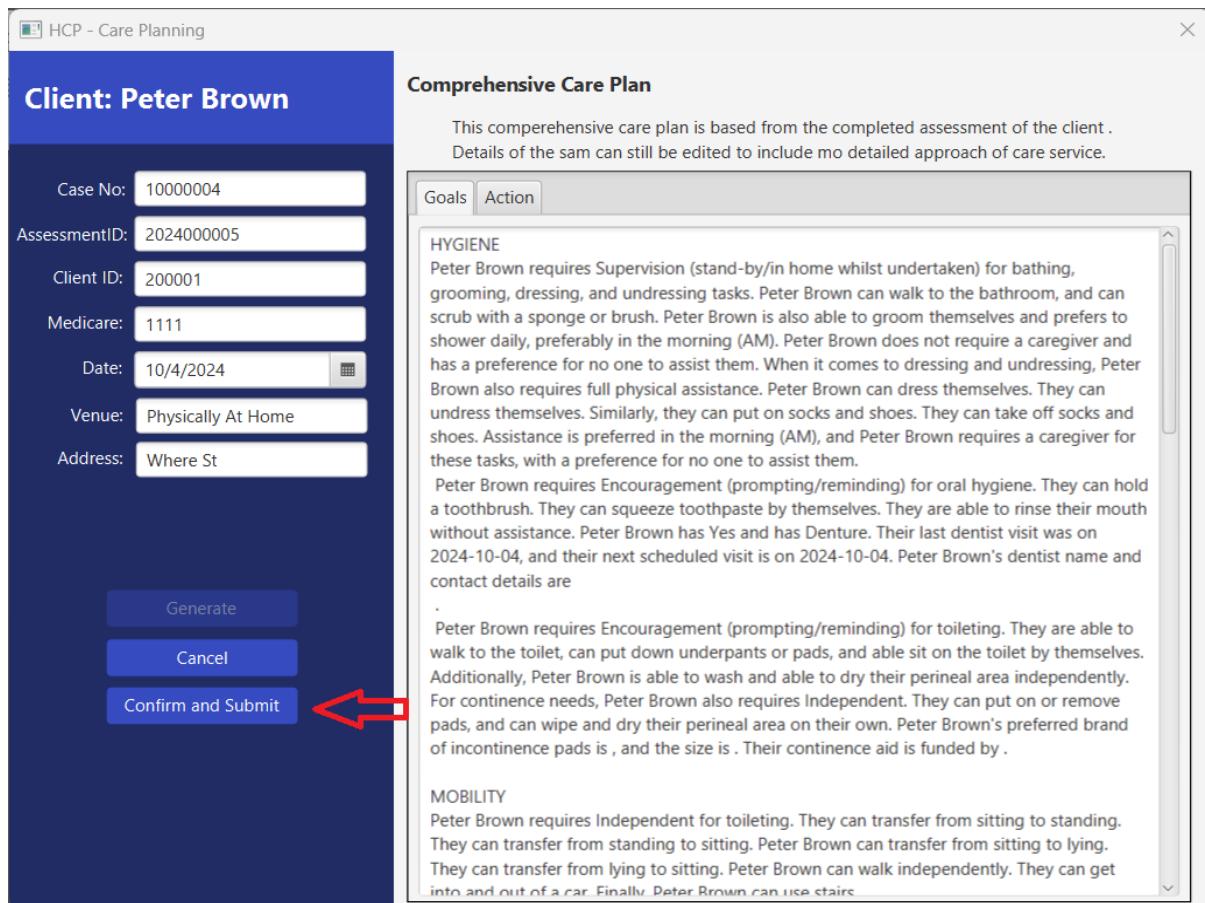
Generate **Cancel** **Confirm and Submit**

Comprehensive Care Plan

This comprehensive care plan is based from the completed assessment of the client . Details of the sam can still be edited to include mo detailed approach of care service.

Goals	Action
HYGIENE	
Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably in the morning (AM). Peter Brown does not require a caregiver and has a preference for no one to assist them. When it comes to dressing and undressing, Peter Brown also requires full physical assistance. Peter Brown can dress themselves. They can undress themselves. Similarly, they can put on socks and shoes. They can take off socks and shoes. Assistance is preferred in the morning (AM), and Peter Brown requires a caregiver for these tasks, with a preference for no one to assist them.	
Peter Brown requires Encouragement (prompting/reminding) for oral hygiene. They can hold a toothbrush. They can squeeze toothpaste by themselves. They are able to rinse their mouth without assistance. Peter Brown has Yes and has Denture. Their last dentist visit was on 2024-10-04, and their next scheduled visit is on 2024-10-04. Peter Brown's dentist name and contact details are .	
Peter Brown requires Encouragement (prompting/reminding) for toileting. They are able to walk to the toilet, can put down underpants or pads, and able sit on the toilet by themselves. Additionally, Peter Brown is able to wash and able to dry their perineal area independently. For continence needs, Peter Brown also requires Independent. They can put on or remove pads, and can wipe and dry their perineal area on their own. Peter Brown's preferred brand of incontinence pads is , and the size is . Their continence aid is funded by .	
MOBILITY	
Peter Brown requires Independent for toileting. They can transfer from sitting to standing. They can transfer from standing to sitting. Peter Brown can transfer from sitting to lying. They can transfer from lying to sitting. Peter Brown can walk independently. They can get into and out of a car. Finally, Peter Brown can use stairs	

6. To confirm the generated Care Plan, click on confirm and submit button.
 This will open a new window that will ask to locate the file saving path and to name the file. (Locate and name the file as intended)



Client: Peter Brown

Case No: 10000004
 AssessmentID: 202400005
 Client ID: 200001
 Medicare: 1111
 Date: 10/4/2024
 Venue: Physically At Home
 Address: Where St

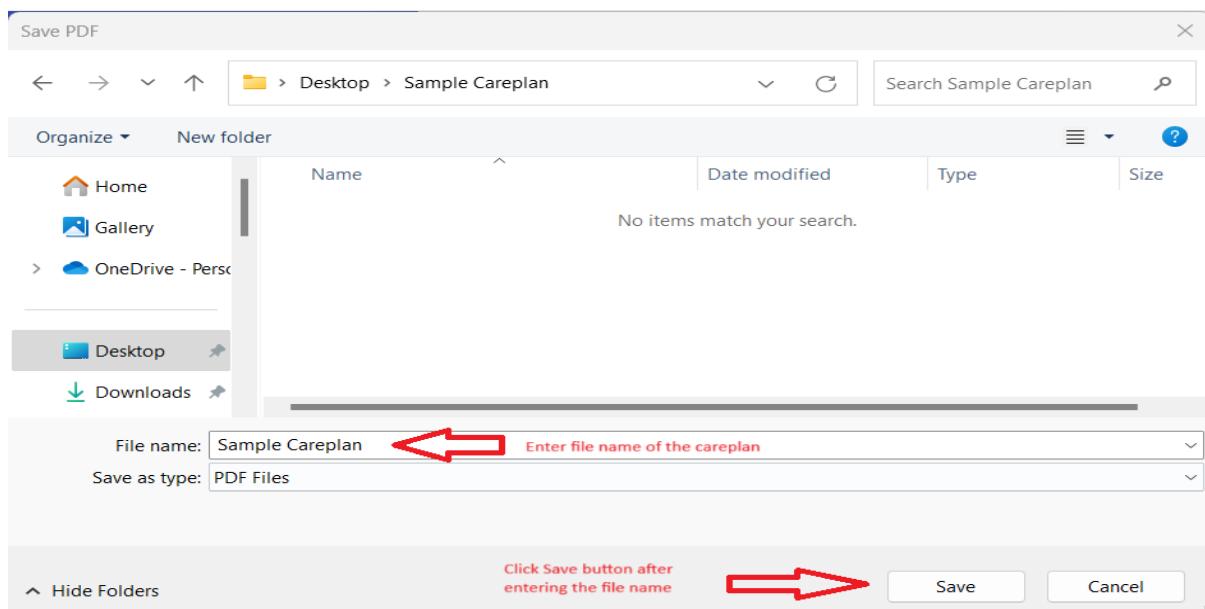
Goals Action

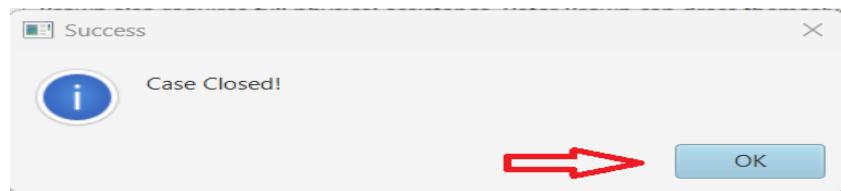
HYGIENE
 Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably in the morning (AM). Peter Brown does not require a caregiver and has a preference for no one to assist them. When it comes to dressing and undressing, Peter Brown also requires full physical assistance. Peter Brown can dress themselves. They can undress themselves. Similarly, they can put on socks and shoes. They can take off socks and shoes. Assistance is preferred in the morning (AM), and Peter Brown requires a caregiver for these tasks, with a preference for no one to assist them.

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Peter Brown requires Encouragement (prompting/reminding) for toileting. They are able to walk to the toilet, can put down underpants or pads, and able sit on the toilet by themselves. Additionally, Peter Brown is able to wash and able to dry their perineal area independently. For continence needs, Peter Brown also requires Independent. They can put on or remove pads, and can wipe and dry their perineal area on their own. Peter Brown's preferred brand of incontinence pads is , and the size is . Their continence aid is funded by .

MOBILITY
 Peter Brown requires Independent for toileting. They can transfer from sitting to standing. They can transfer from standing to sitting. Peter Brown can transfer from sitting to lying. They can transfer from lying to sitting. Peter Brown can walk independently. They can get into and out of a car. Finally, Peter Brown can use stairs.





Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000
Created By: Case Manager Name
Date Created: 04/10/2024

My Plan

Client Number: 200001
Client Name: Client: Peter Brown
Client Address: Where St
Case Manager: John Doe
Assessed Level: Level 2
Assessment Date: 04/10/2024
Plan Review: N/A
Venue: Physically At Home

GOALS:

HYGIENE Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably in the morning (AM). Peter Brown does not require a caregiver and has a preference for no one to assist them. When it comes to dressing and undressing, Peter Brown also requires full physical assistance. Peter Brown can dress themselves. They can undress themselves. Similarly, they can put on socks and shoes. They can take off socks and shoes. Assistance is preferred in the morning (AM), and Peter Brown requires a caregiver for these tasks, with a preference for no one to assist them. Peter Brown requires Encouragement (prompting/reminding) for oral hygiene. They can hold a toothbrush. They can squeeze toothpaste by themselves. They are able to rinse their mouth without assistance. Peter Brown has Yes and has Denture. Their last dentist visit was on 2024-10-04, and their next scheduled visit is on 2024-10-04. Peter Brown's dentist name and contact details are . Peter Brown requires Encouragement (prompting/reminding) for toileting. They are able to walk to the toilet, can put down underpants or pads, and able sit on the toilet by themselves. Additionally, Peter Brown is able to wash and able to dry their perineal area independently. For continence needs, Peter Brown also requires Independent. They can put on or remove pads, and can wipe and dry their perineal area on their own. Peter Brown's preferred brand of incontinence pads is , and the size is . Their continence aid is funded by . MOBILITY Peter Brown requires Independent for toileting. They can transfer from sitting to standing. They can transfer from standing to sitting. Peter Brown can transfer from sitting to lying. They can transfer from lying to sitting. Peter Brown can walk independently. They can get into and out of a car. Finally, Peter Brown can use stairs. The client uses no mobility aids as aids for mobility. Peter Brown requires a mechanical lifter and Peter Brown has a history of falls. Details of their last fall include . Peter Brown is exercising. They are doing . They requires a referral to Allied Health Services such as physiotherapy, hydrotherapy, or occupational therapy. In terms of mobility, Peter Brown is unsteady, stooped over, and leaning to one side. Peter Brown does have trouble breathing. Regarding communication, Peter Brown has No specific limitation. Peter Brown is able to fit their hearing aids and able to check or change batteries. NUTRITION Peter Brown requires no assistance for their nutritional needs. They require assistance with nutrition, meal preparation, or when eating or drinking. They require a meal delivery service. Peter Brown has swallowing difficulties when eating or drinking. They have lost weight in the past year and do take any meal or nutritional supplements. Peter

• Case Creation

- To create a new case, click on the Create Cases from the left panel menu. This will open a new window.

Hi John Sins

- Dashboard
- Manage Cases
- Create Cases
- Budget Plan
- Budget Viewer
- Reports

Need help?

Manage Cases

Case No	Client Name	Case Type	assignedCSO	Status
10000004	Peter Brown	New Assess...	mark adona	Comple...

Search Case Search

Case Number: 10000004
Client ID: 200001
First Name: Peter
Last Name: Brown
Birthday: 10/3/1952
Medicare ID: 1111
Contact: 0411111111
Address: Where St

Assessment Type: New Assessment
Date Created: 10/4/2024
Priority: High
Assigned CSO:
Status: Complete

Update Finalise Save Cancel

- Select a client from the list and click on Create Button.

Create a new case

Create a new Case Profile for a client.

Client Number	Client Name	Medicare ID	Funding Level
200001	Peter Brown	1111	Level 0
200002	Gregory Williams	1234	Level 2
200003	Danica Ballesteros	1	Level 0
200004	ew ew	2323	Level 0

Search Client Search Case Number: 10000005

Client ID: 200001
 First Name: Peter
 Last Name: Brown
 Birthday: 10/3/1952
 Medicare ID: 1111
 Contact: 0411111111
 Address: Where St

Case Type: New Assessment
 Client Status: New Client
 Date Created: 10/4/2024

Priority: High
 CSO Assignment: 10012 - www Ben
 Target Completion: 10/4/2024

Click create button after selecting the client

Create **Confirm** **Cancel**

- Manage the case information the click on the confirm button. This will automatically create a new case for a specific and chosen client.

Create a new case

Creating a new case for client:
Peter Brown

Client Number	Client Name	Medicare ID	Funding Level
200001	Peter Brown	1111	Level 0
200002	Gregory Williams	1234	Level 2
200003	Danica Ballesteros	1	Level 0
200004	ew ew	2323	Level 0

Search Client Search Case Number: 10000005

Client ID: 200001
 First Name: Peter
 Last Name: Brown
 Birthday: 10/3/1952
 Medicare ID: 1111
 Contact: 0411111111
 Address: Where St

Case Type: New Assessment
 Client Status: New Client
 Date Created: 10/4/2024

Priority: High
 CSO Assignment: 10012 - www Ben
 Target Completion: 10/4/2024

Confirm **Cancel**



• Budget Planning

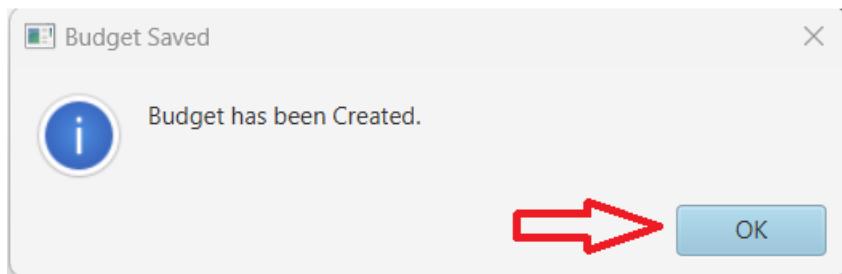
1. To create a new budget plan, navigate to the Budget Plan from the side menu. Select from the list of Ready for Budget clients then click on generate. This will automatically fill all the information on the screen.

Screenshot of the 'Budget Planning' interface. The sidebar on the left shows 'Budget Plan' selected, indicated by a red arrow. The main panel displays a table with one row: Client ID 200001 and Client Name Peter Brown. To the right is a 'Client Details' section with fields for Client No, Client Name, Client DOB, Fund Level, Prepared By, and Date. Below it is a note: '*This budget is based on a 31 day month & 365 day year.' A 'Generate' button is next to it. Further down are sections for 'Management Details' and 'ITEMISED MONTHLY BUDGET'. At the bottom are 'Save' and 'Cancel' buttons.

Screenshot of the 'Budget Planning' interface. The sidebar on the left shows 'Budget Plan' selected, indicated by a red arrow. The main panel displays a table with one row: Client ID 200001 and Client Name Peter Brown. A red arrow points to the 'Select client' link below the table. To the right is a 'Client Details' section with fields for Client No, Client Name, Client DOB, Fund Level, Prepared By, and Date. Below it is a note: '*This budget is based on a 31 day month & 365 day year.' A 'Generate' button is next to it. Further down are sections for 'Management Details' and 'ITEMISED MONTHLY BUDGET'. At the bottom are 'Save' and 'Cancel' buttons.

- Click the save Buton to confirm the generated budget plan. Prompts will be confirm the creation.

The screenshot shows the 'Budget Planning' module. On the left, a sidebar menu includes 'Dashboard', 'Manage Cases', 'Create Cases', 'Budget Plan', 'Budget Viewer', and 'Reports'. Below the sidebar is a 'Need help?' link. The main area displays 'Client Details' for Client ID 200001 and Name Peter Brown, with preparation details for John Sins on 2024-10-04. It also shows 'Management Details' with Government Subsidy of 10000.00, Less Care Management Fee of 0.20%, and Less Package Management Fee of 0.15%. A summary table shows a total amount to spend of 1164988.35. At the bottom right, there are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.



5.2 Client Services Officer (CSO)

- Manage Assigned Assessments**

- To act upon the assigned cases, navigate to the My Cases tab by clicking it on the side panel menu.

The screenshot shows the software's main window with a blue header bar. On the left, a sidebar menu lists several options: Dashboard, My Cases (which has a red arrow pointing to it), Manage Clients, New Client, Budget Viewer, and Reports. The main content area is titled "My Cases". At the top of this area is a search bar with the placeholder "Search Case" and a "Search" button. Below the search bar is a table titled "Assigned Cases:" with columns: Case ID, Client ID, Client Name, Case Type, Case Priority, and Case Age. One row is visible, showing Case ID 10000004, Client ID 200001, Client Name Peter Brown, Case Type New Assess..., Case Priority High, and Case Age 0. To the right of the table is a form for client details: Client ID (200001), First Name (Peter), Last Name (Brown), Birthday (10/3/1952), Medicare ID (1111), Contact (0411111111), and Address (Where St). To the right of this form is another form for closing cases: Case ID (10000004), Date (empty), Closing Reasons (empty text area), and buttons for Start Assessment, Complete/Close, Confirm, and Cancel.

2. Closing a Case

For any valid reason, click on the Complete/Close button to close the case. This will require you to add Closing Reasons to prior confirming the action. Select a client first and follow the prompts

This screenshot is identical to the one above, showing the software's main window. A red arrow points to the "My Cases" option in the sidebar. Another red arrow points to the "Complete/Close" button in the client details form on the right side of the screen.

Click on confirm button to close the case.

The screenshot shows a user interface for managing home care clients. On the left sidebar, there are links for Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. A message "Hi mark adona" is displayed at the top. The main area is titled "My Cases" and contains a table of "Assigned Cases". The table has columns for Case ID, Client ID, Client Name, Case Type, Case Priority, and Case Age. One row is visible with values: Case ID 10000006, Client ID 200004, Client Name ew ew, Case Type New Assess..., Case Priority High, and Case Age 0. Below the table, there are two forms. The left form contains fields for Client ID (200004), First Name (ew), Last Name (ew), Birthday (10/11/1951), Medicare ID (2323), Contact (0000000000), and Address (wewe@yahoo.com). The right form contains fields for Case ID (10000006) and Date (2024-10-04), and a section for Closing Reasons with the option "Done Assessment". At the bottom right, there are "Start Assessment" and "Complete/Close" buttons, and a red arrow points to a "Confirm" button.

Assigned Cases:

Case ID	Client ID	Client Name	Case Type	Case Priority	Case Age
10000006	200004	ew ew	New Assess...	High	0

Client ID: 200004

First Name: ew

Last Name: ew

Birthday: 10/11/1951

Medicare ID: 2323

Contact: 0000000000

Address: wewe@yahoo.com

Start Assessment Complete/Close

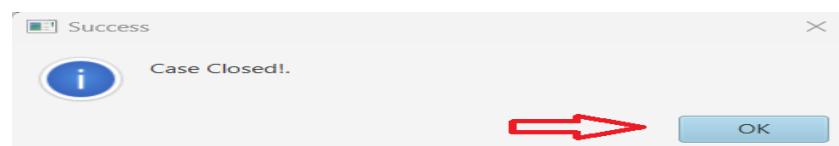
Case ID: 10000006 Date: 2024-10-04

Closing Reasons:

Done Assessment

Confirm Cancel

Red arrow pointing to the "Confirm" button.



3. Making Assessments

To proceed with the assessments, select a client entry from the table and click the Start Assessment.

The screenshot shows the 'My Cases' section of the application. At the top, it displays 'Assigned Cases:' with a search bar and a 'Search' button. Below is a table with one row of data:

Case ID	Client ID	Client Name	Case Type	Case Priority	Case Age
10000004	200001	Peter Brown	New Assess...	High	0

Below the table, there is an overlaid form for a client named Peter Brown. The form includes fields for Client ID, First Name, Last Name, Birthday, Medicare ID, Contact, and Address. To the right of the form are two buttons: 'Start Assessment' and 'Complete/Close'. A red arrow points to the 'Start Assessment' button. On the far right, there are fields for Case ID and Date, and a section for Closing Reasons with 'Confirm' and 'Cancel' buttons.

- A new window will open which contain the client and case information. Follow the on-screen instructions to complete the assessment.

Client Assessment

Client information

Personal Hygiene

Oral Hygiene

Toileting

Mobility

Other Mobility

Nutrition

Skin Integrity and Podiatry

Mental Health

Medication

Pain Management

Housing

Home Environment and Transport

End of Life

Complete Assessment

Client information

Client ID: 200001 Medicare: 1111
First Name: Peter Last Name: Brown
Birthday: 1975-02-20 Case No: 10000004

Assessment Details

Assessment No: 2024000005
Assessor: mark adona
Assessment Date: 10/4/2024
Venue: Physically At Home

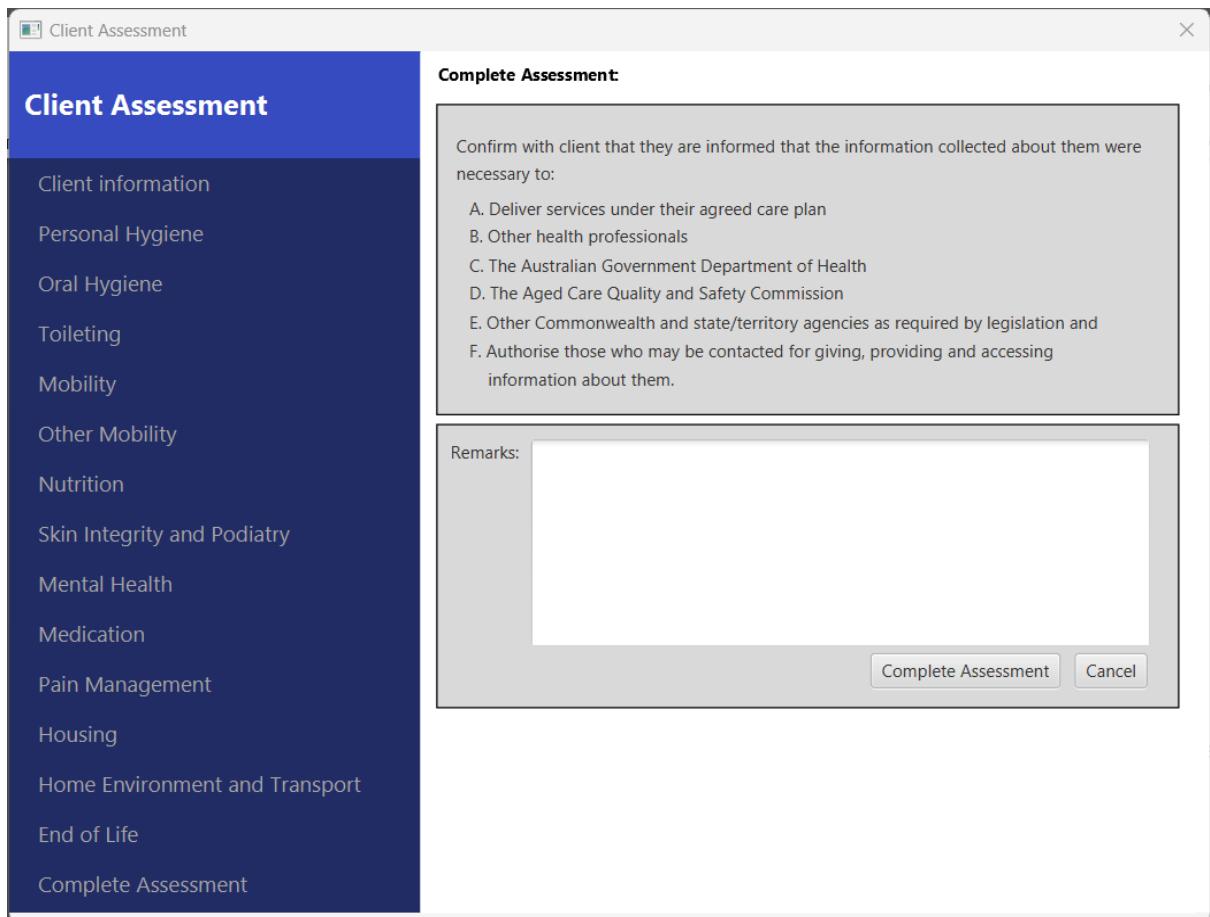
Assessment Instructions

This form collects personal information about client for the purpose of delivering care and treatment. Ensure that the client is informed about the following:

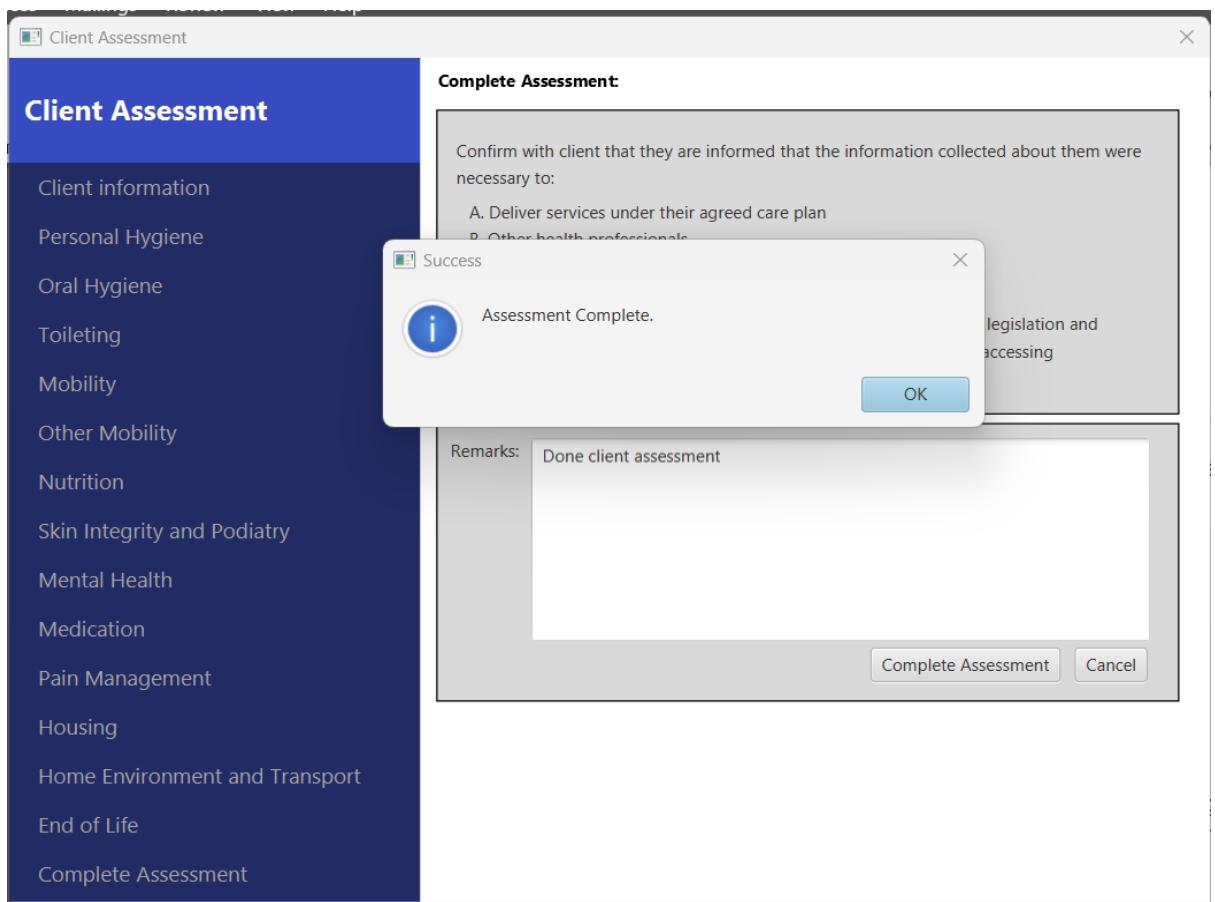
1. That we will not use or release of their information for other purposes without their consent.
2. However, we are permitted to exchange required information with relevant agencies.
3. It is their right to withdraw consent at any time and to obtain access to the information held about them.

Start Assessment **Cancel**

- At the end of the assessment, it will require to put on some remarks prior to confirming the completion.

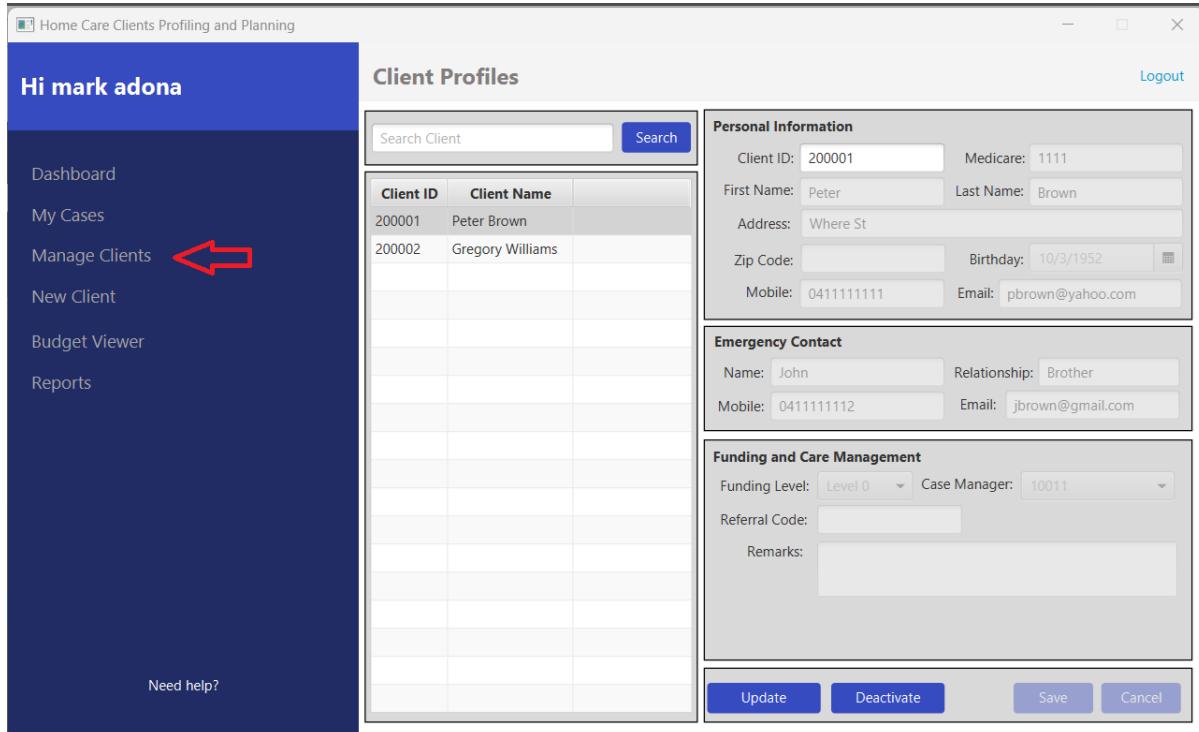


- A dialog will pop up to confirm the successful completion of the assessment.

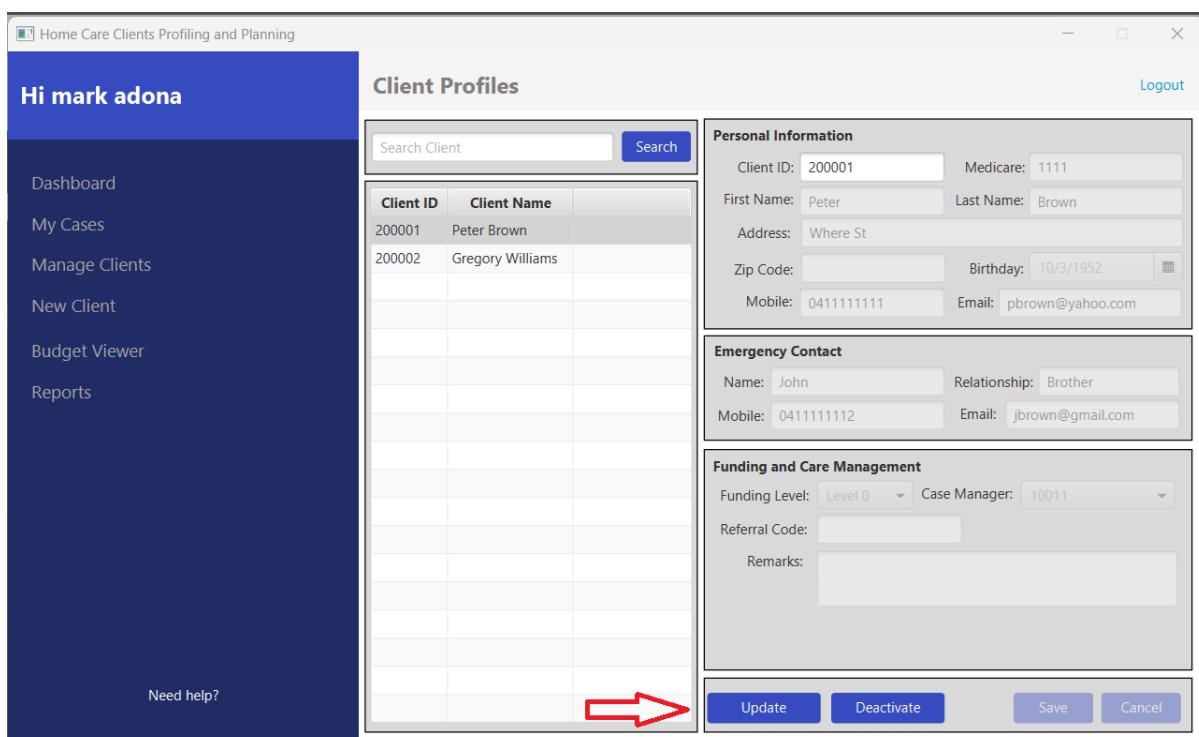


- **Client Profile Management**

1. To update client information, navigate to the Manage Client by clicking on the left panel menu, select a client from the table and click on update.



The screenshot shows the software's main interface. On the left, a dark blue sidebar menu lists several options: Dashboard, My Cases, Manage Clients (with a red arrow pointing to it), New Client, Budget Viewer, and Reports. Below the menu is a "Need help?" link. The main content area has a title "Client Profiles". It features a search bar with "Search Client" and "Search" button. Below the search is a table with columns "Client ID" and "Client Name", containing two rows: 200001 Peter Brown and 200002 Gregory Williams. To the right of the table are three panels: "Personal Information" (Client ID: 200001, Medicare: 1111, First Name: Peter, Last Name: Brown, Address: Where St, Zip Code: [empty], Birthday: 10/3/1952, Mobile: 0411111111, Email: pbrown@yahoo.com), "Emergency Contact" (Name: John, Relationship: Brother, Mobile: 0411111112, Email: jbrown@gmail.com), and "Funding and Care Management" (Funding Level: Level 0, Case Manager: 10011, Referral Code: [empty], Remarks: [empty]). At the bottom are four buttons: "Update", "Deactivate", "Save" (highlighted in blue), and "Cancel".



This screenshot is identical to the one above, showing the "Manage Clients" section. The only difference is the highlighted "Save" button at the bottom of the right-hand panel, which is highlighted in red to indicate the user action.

2. Update the details as intended then click on save. Follow the prompts once successful the system will confirm.

Home Care Clients Profiling and Planning

Hi mark adona

Logout

Client Profiles

Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?

Search Client

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

Personal Information

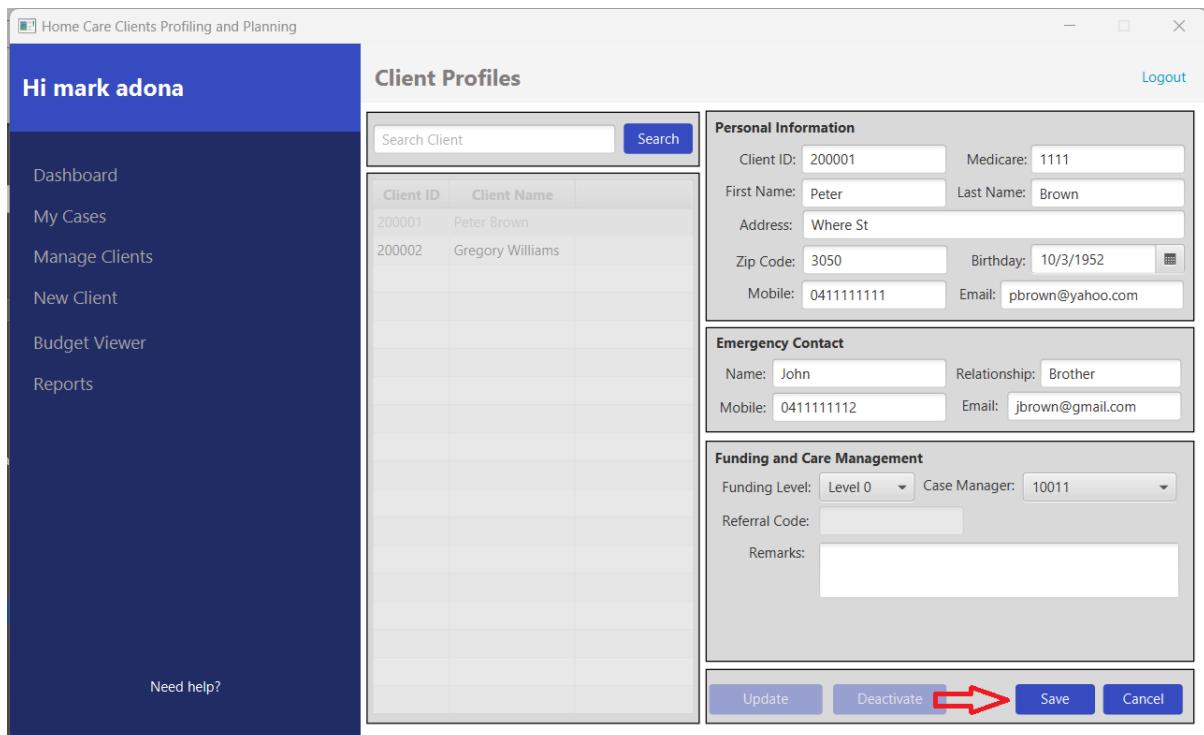
Client ID:	200001	Medicare:	1111
First Name:	peter	Last Name:	Brown
Address:	Where St		
Zip Code:	3050	Birthday:	10/3/1952
Mobile:	0411111111	Email:	pbrown@yahoo.com

Emergency Contact

Name:	John	Relationship:	Brother
Mobile:	0411111112	Email:	jbrown@gmail.com

Funding and Care Management

Funding Level:	Level 0	Case Manager:	10011
Referral Code:			
Remarks:			



Home Care Clients Profiling and Planning

Hi mark adona

Logout

Client Profiles

Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?

Search Client

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

Personal Information

Client ID:	200001	Medicare:	1111
First Name:	Peter	Last Name:	Brown
Address:	Where St		
Zip Code:	3050	Birthday:	10/3/1952
Mobile:	1111111111	Email:	pbrown@yahoo.com

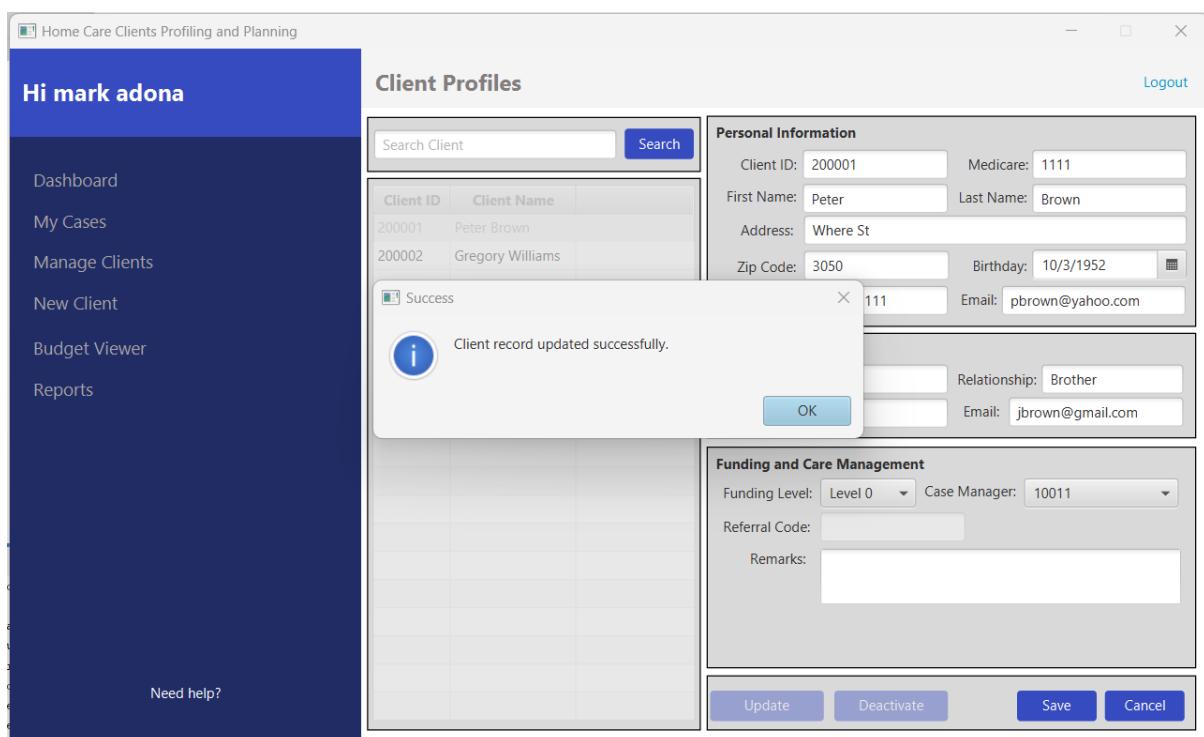
Emergency Contact

Name:	John	Relationship:	Brother
Mobile:	0411111112	Email:	jbrown@gmail.com

Funding and Care Management

Funding Level:	Level 0	Case Manager:	10011
Referral Code:			
Remarks:			

 Client record updated successfully.



3. To deactivate a user profile, select a client from the table and click on Deactivate. Follow the on-screen prompts to complete the deactivation.

Home Care Clients Profiling and Planning

Hi mark adona

Logout

Client Profiles

Search Client Search

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams
200003	Danica Ballesteros

Personal Information

Client ID: 200003 Medicare: 1
First Name: Danica Last Name: Ballesteros
Address: 4 Watergardebs
Zip Code: 3070 Birthday: 10/16/1958
Mobile: 0412345678 Email: danica@yahoo.com

Emergency Contact

Name: Vic Sotto Relationship: Father
Mobile: 0412345678 Email: Vic@yahoo.com

Funding and Care Management

Funding Level: Level 0 Case Manager: 10011
Referral Code: Remarks:

Update Deactivate Save Cancel

Need help?



Home Care Clients Profiling and Planning

Hi mark adona

Logout

Client Profiles

Search Client Search

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams
200003	Danica Ballesteros

Personal Information

Client ID: 200003 Medicare: 1
First Name: Danica Last Name: Ballesteros
Address: 4 Watergardebs
Zip Code: 3070 Birthday: 10/16/1958
Mobile: 0412345678 Email: danica@yahoo.com

Deactivate Record

Are you sure you want to deactivate this client?
This action cannot be undone.

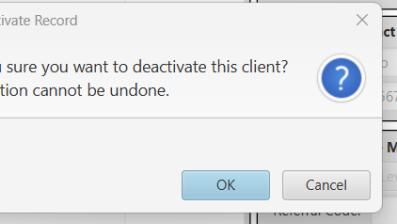
OK Cancel

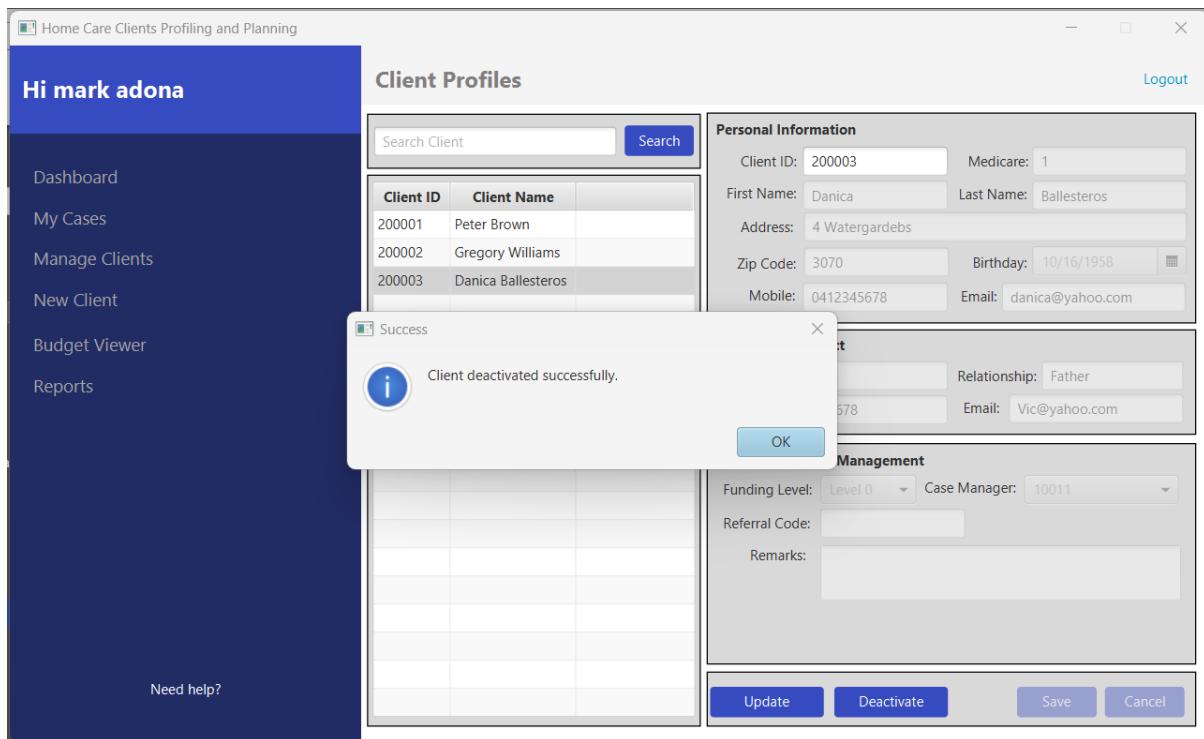
Management

Funding Level: Level 0 Case Manager: 10011
Referral Code: Remarks:

Update Deactivate Save Cancel

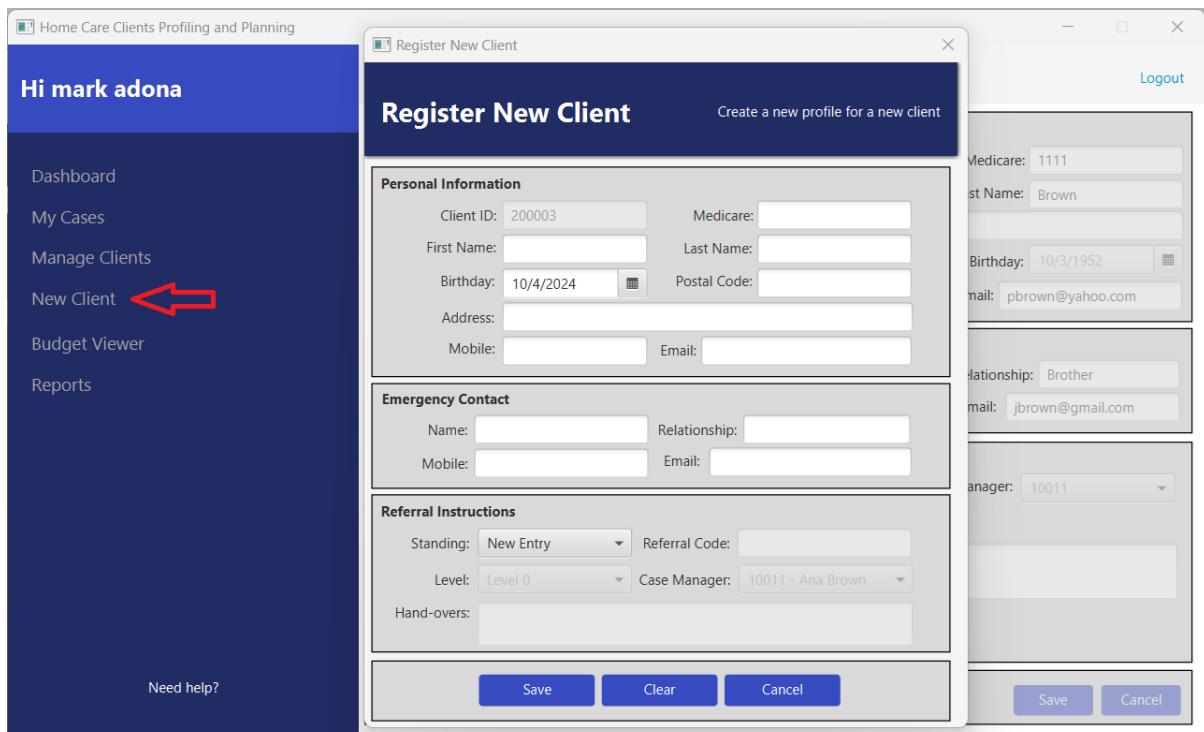
Need help?





- **Enrol New Client**

1. To enrol a new client, click on the New Client menu, a new window will open to register a new client.



Fill in all the required fields and follow on screen validation.

Register New Client

Create a new profile for a new client

Personal Information

Client ID:	200003	Medicare:	1
First Name:	Danica	Last Name:	Ballesteros
Birthday:	10/4/1992	Postal Code:	3070
Address:	4 Watergardebs		
Mobile:	0456124574	Email:	danica@yahoo.com

Emergency Contact

Name:	Vic Sotto	Relationship:	Father
Mobile:	04123457	Email:	Vic@yahoo.com

Referral Instructions

Standing:	New Entry	Referral Code:	
Level:	Level 0	Case Manager:	10011 - Ana Brown
Hand-overs:			

Buttons: Save, Clear, Cancel

2. Once complete, click on save and a confirmation will pop

Register New Client

Create a new profile for a new client

Personal Information

Client ID:	200003	Medicare:	1
First Name:	Danica	Last Name:	Ballesteros
Birthday:	10/4/1992	Postal Code:	3070
Address:	4 Watergardebs		
Mobile:	0456124574	Email:	danica@yahoo.com

Emergency Contact

Name:	Vic Sotto	Relationship:	Father
Mobile:	04123457	Email:	Vic@yahoo.com

Referral Instructions

Standing:	New Entry	Referral Code:	
Level:	Level 0	Case Manager:	10011 - Ana Brown
Hand-overs:			

Buttons: Save, Clear, Cancel



Register New Client

Create a new profile for a new client

Personal Information

Client ID:	200003	Medicare:	1
First Name:	Danica	Last Name:	Ballesteros

Emergency Contact

Name:	Vic Sotto	Relationship:	Father
Mobile:	0412345678	Email:	Vic@yahoo.com

Referral Instructions

Standing:	New Entry	Referral Code:	
Level:	Level 0	Case Manager:	10011 - Ana Brown
Hand-overs:			

Action Buttons

- Save**
- Clear**
- Cancel**

Success Message

Client Record Created

- Budget Viewing**

1. To view the client budget, navigate to the Budget Viewing by clicking it on the side menu. This will open a new window. Select a client to view the corresponding budget.

Home Care Clients Profiling and Planning

Hi mark adona

Client Profiles

Personal Information

Client ID:	200001	Medicare:	1111
First Name:	Peter	Last Name:	Brown
Address:		Where St	
Zip Code:		Birthday:	10/3/1952
Mobile:	0411111111	Email:	pbrown@yahoo.com

Emergency Contact

Name:	John	Relationship:	Brother
Mobile:	0411111112	Email:	jbrown@gmail.com

Funding and Care Management

Funding Level:	Level 0	Case Manager:	10011
Referral Code:			
Remarks:			

Action Buttons

- Update**
- Deactivate**
- Save**
- Cancel**

Budget Viewer 

Need help?

Budget Viewer

View current and newly generated monthly budget

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

Client Details

Client No:	200001	Client Name:	Peter Brown
Client DOB:	1952-10-03	Fund Level:	Level 0
Prepared By:	Ana Brown	Date:	2024-10-03

*This budget is based on a 31 day month & 365 day year.

Management Details		Month
Government Subsidy	10000.00	1199988.00
Less Care Management Fee	0.15 %	19999.80
Less Package Management Fee	0.20 %	14999.85
Total Amount to Spend		1164988.35

ITEMISED MONTHLY BUDGET

Description of Care Services	Numbers of Units	Total
Domestic Assistance1	3	201.0
Transport Assistance	3	201.0

Total Expenses: 402.00

Extract Print

- To extract the budget to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)

Budget Viewer

View current and newly generated monthly budget

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

Client Details

Client No:	200001	Client Name:	Peter Brown
Client DOB:	1952-10-03	Fund Level:	Level 0
Prepared By:	Ana Brown	Date:	2024-10-03

*This budget is based on a 31 day month & 365 day year.

Management Details

	Month
Government Subsidy	10000.00
Less Care Management Fee	0.15 %
Less Package Management Fee	0.20 %
Total Amount to Spend	1164988.35

ITEMISED MONTHLY BUDGET

Description of Care Services	Numbers of Units	Total
Domestic Assistance1	3	201.0
Transport Assistance	3	201.0

Total Expenses: 402.00 **Extract** **Print**



Budget Viewer

View current and newly generated monthly budget

Client ID	Client Name
200001	Peter Brown
200002	Gregory Williams

Client Details

Client No:	200001	Client Name:	Peter Brown
Client DOB:	1952-10-03	Fund Level:	Level 0
Prepared By:	Ana Brown	Date:	2024-10-03

*This budget is based on a 31 day month & 365 day year.

Confirmation

You are about to generate the budget PDF. Do you want to proceed?

OK **Cancel**

Month
1199988.00
19999.80
14999.85

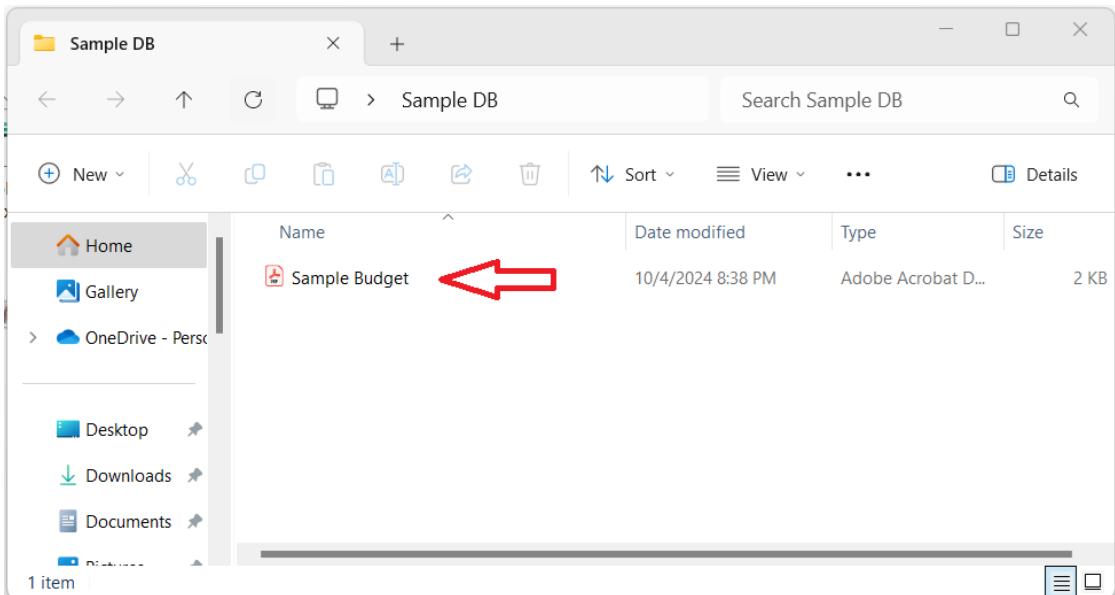
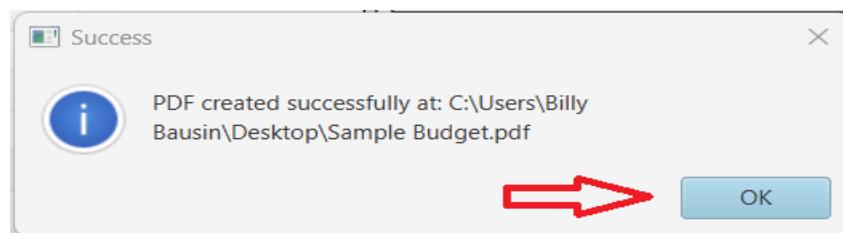
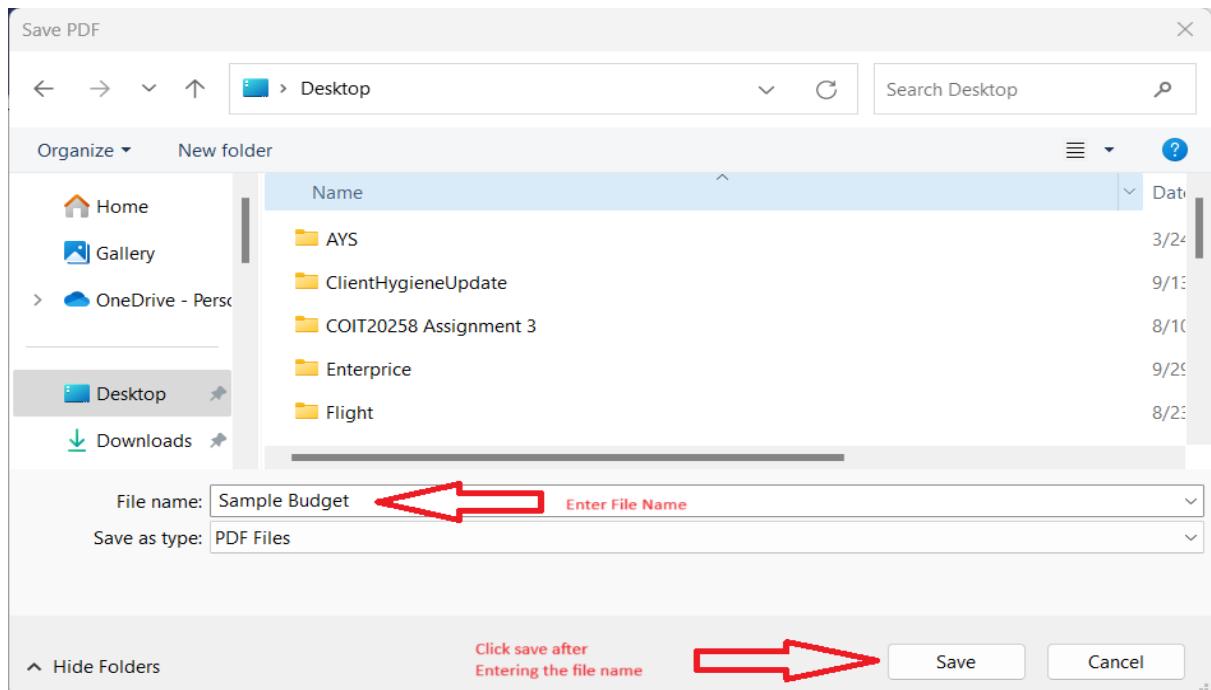
Total Amount to Spend 1164988.35

ITEMISED MONTHLY BUDGET

Description of Care Services	Numbers of Units	Total
Domestic Assistance1	3	201.0
Transport Assistance	3	201.0

Total Expenses: 402.00 **Extract** **Print**





Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000

BUDGET PLAN:

Client Number: 200001
 Client Name: Peter Brown
 Assessed Level: Level 0
 Date of Birth: 1952-10-03

Management Details:

Government Subsidy:	10000.00
Care Management Fee:	0.15
Package Management Fee:	19999.80

Expenses / Services:

Services	Units	Cost
Domestic Assistance1	3	\$201.00
Transport Assistance	3	\$201.00
Total Expenses:		\$402.00

Prepared by: Ana Brown Date Created: 2024-10-03

- To print the budget, click on the print button and follow the on-screen print instructions.

Budget Viewer View current and newly generated monthly budget

Client ID **Client Name**

200001	Peter Brown
200002	Gregory Williams

Client Details

Client No:	200001	Client Name:	Peter Brown
Client DOB:	1952-10-03	Fund Level:	Level 0
Prepared By:	Ana Brown	Date:	2024-10-03

*This budget is based on a 31 day month & 365 day year.

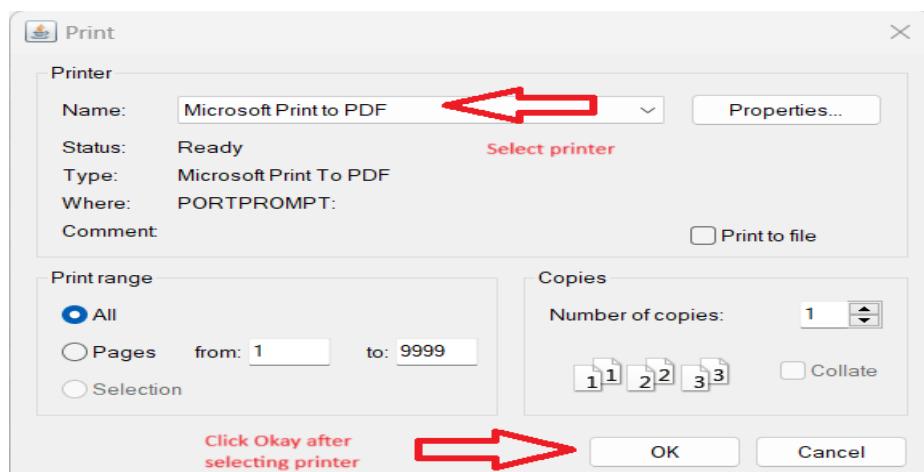
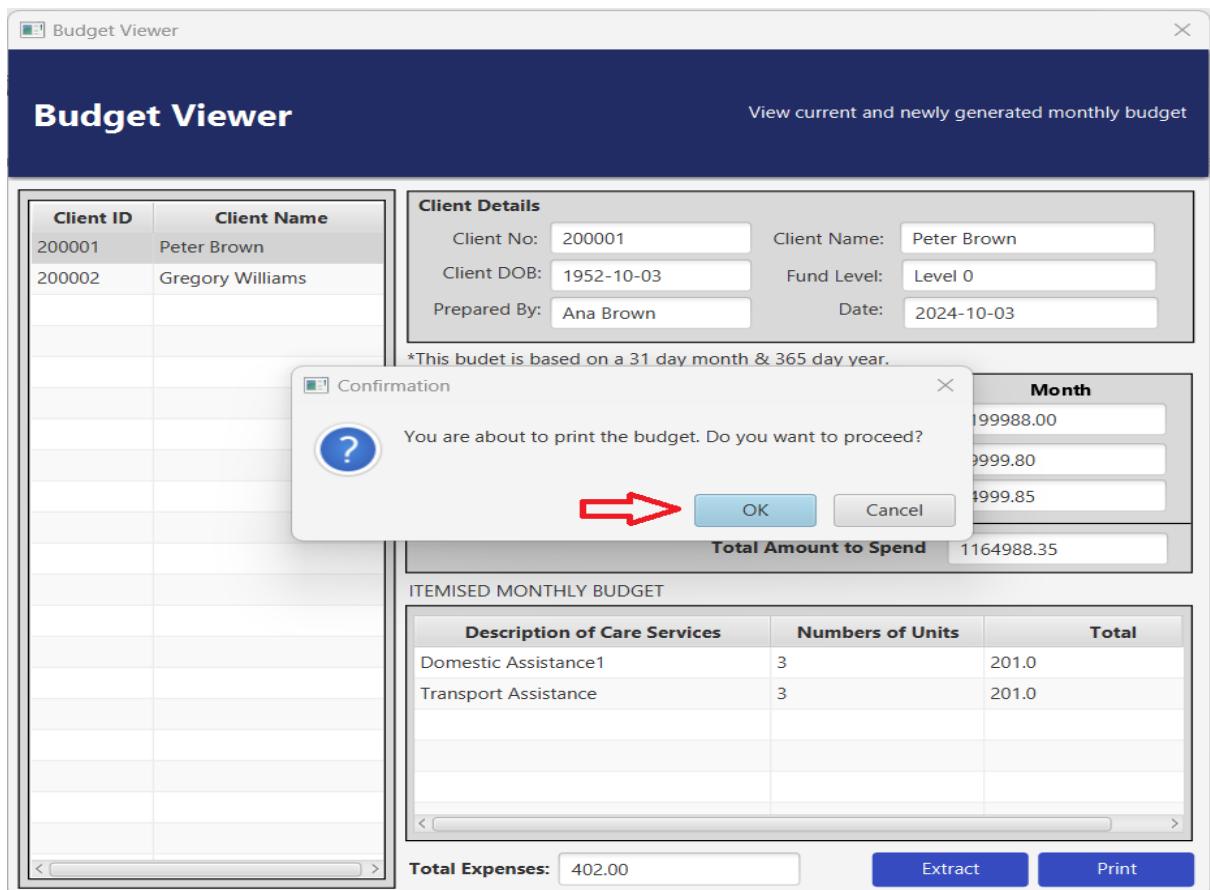
Management Details	Month
Government Subsidy 10000.00	1199988.00
Less Care Management Fee 0.15 %	19999.80
Less Package Management Fee 0.20 %	14999.85
Total Amount to Spend 1164988.35	

ITEMISED MONTHLY BUDGET

Description of Care Services	Numbers of Units	Total
Domestic Assistance1	3	201.0
Transport Assistance	3	201.0

Total Expenses: 402.00 **Extract** **Print**





• Reports Generation

1. To generate a report, click on the Reports on the left side panel menu and select which type of report that is intended to generate then click on generate. Options for custom reports is also available depending on the report type.

Home Care Clients Profiling and Planning

Hi mark adona

Logout

Reports

Dashboard

My Cases

Manage Clients

New Client

Budget Viewer

Reports 

Need help?

Report Type: Cases Reports Start Date: 10/4/2024
Current Month Specific Date End Date: 10/4/2024

Generate

Client Name	Date Created	Assigned CSO	Status
No content in table			

Extract Print

Home Care Clients Profiling and Planning

Hi mark adona

Logout

Reports

Dashboard

My Cases

Manage Clients

New Client

Budget Viewer

Reports

Need help?

Report Type: Cases Reports Start Date: 10/4/2024
Current Month Specific Date End Date: 10/4/2024

Generate 

Client Name	Date Created	Assigned CSO	Status
No content in table			

Extract Print

The screenshot shows a software application window titled "Home Care Clients Profiling and Planning". The top navigation bar includes a logo, the title, and standard window controls. A blue sidebar on the left contains a greeting "Hi mark adona" and links for "Dashboard", "My Cases", "Manage Clients", "New Client", "Budget Viewer", and "Reports". The main content area is titled "Reports" and displays an "Assessment Reports" section. It features a dropdown for "Report Type", date range inputs for "Start Date" (10/4/2024) and "End Date" (10/4/2024), and radio buttons for "Current Month" and "Specific Date". A "Generate" button is located to the right of the date fields. Below this is a table with columns: "Client Name", "Assessment Date", "Assigned CSO", and "Remarks". The table data is as follows:

Client Name	Assessment Date	Assigned CSO	Remarks
Peter Brown	2024-10-03	Ben Ben	
Peter Brown	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Peter Brown	2024-10-04	mark adona	Done client assessment

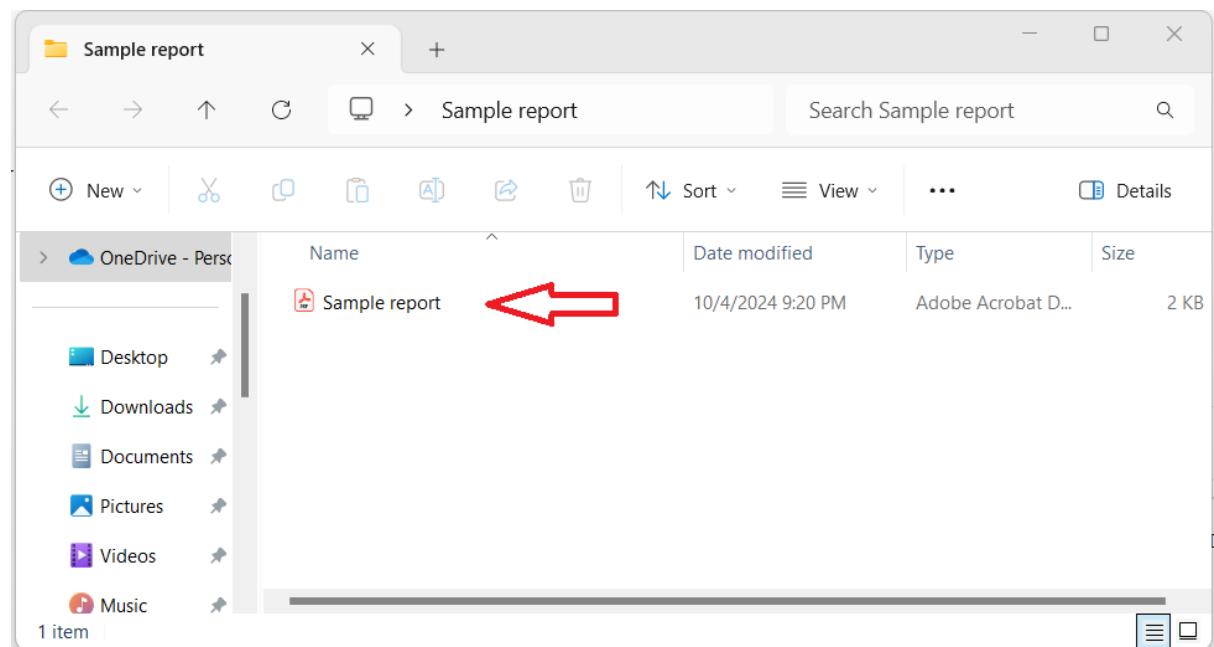
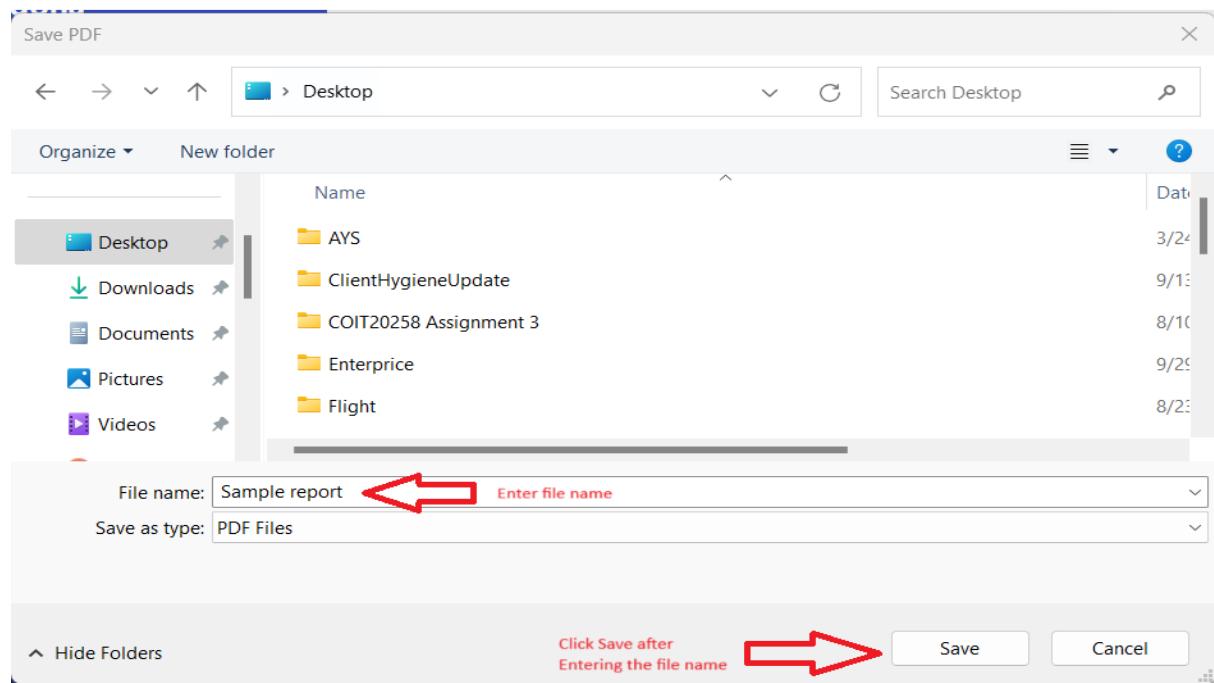
At the bottom of the main content area are "Extract" and "Print" buttons. The footer contains a "Need help?" link and standard footer text.

2. To extract the report to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)

The screenshot shows the software's main window with a dark blue sidebar on the left and a light gray main content area. The sidebar has a user greeting "Hi mark adona" at the top, followed by links: Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. At the bottom of the sidebar is a "Need help?" link. The main content area has a title "Reports" and a sub-section for "Assessment Reports". It includes filters for "Report Type" (set to "Assessment Reports"), "Start Date" (10/4/2024), "End Date" (10/4/2024), and date selection options ("Current Month" and "Specific Date"). A "Generate" button is located to the right of the filters. Below the filters is a table with columns: Client Name, Assessment Date, Assigned CSO, and Remarks. The table contains six rows of data. The last row, for Peter Brown on 2024-10-04, has a "Remarks" field containing "mark adona" and "Done client assessment". At the bottom of the main content area are "Extract" and "Print" buttons, with a red arrow pointing to the "Extract" button.

Client Name	Assessment Date	Assigned CSO	Remarks
Peter Brown	2024-10-03	Ben Ben	
Peter Brown	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Gregory Williams	2024-10-03	Ben Ben	
Peter Brown	2024-10-04	mark adona	Done client assessment

Extract → Print



Sample Company Home Care Provider
Report: Cases Reports
Date Coverage: 2024-10-04 to 2024-10-04

Client Name	Date Created	Assigned CSO	Status
Peter Brown	2024-10-03	Ben Ben	Closed
Peter Brown	2024-10-03	Ben Ben	Open
Peter Brown	2024-10-04	mark adona	Complete

Summary:
Total Records: 3
Generated by: mark adona
Generated on: 2024-10-04

3. To print the report, click on the print button and follow the on-screen print instructions.

Home Care Clients Profiling and Planning

Hi mark adona

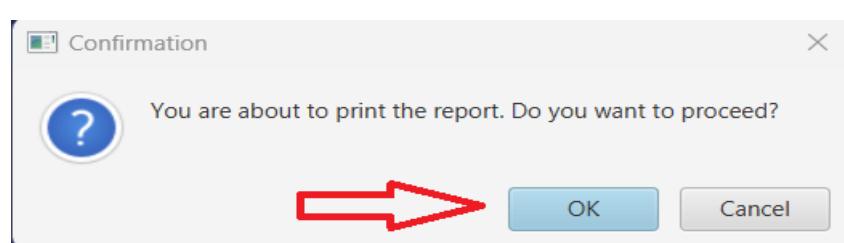
Reports

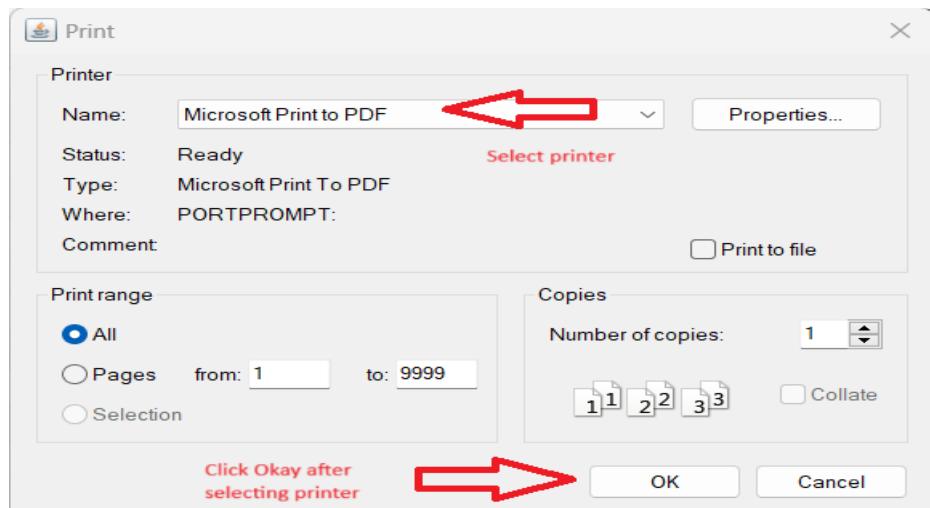
Logout

Report Type: Client Reports Start Date: 10/4/2024
Current Month Specific Date End Date: 10/4/2024 Generate

Client ID	Client Name	Birthday	Level	Medicare
200001	Peter Brown	1952-10-03	Level 0	1111
200002	Gregory Williams	1948-10-20	Level 2	1234
200003	Danica Ballesteros	1958-10-16	Level 0	1
200004	ew ew	1951-10-11	Level 0	2323

Need help? Extract Print





5.3 System Administrator

- **User Management**

1. Navigate to Manage Users from the left panel menu then select from the user list the profile that you wish to update then click the Update Button. This will allow managing the client details. Click on save to confirm changes

The screenshot shows the 'Home Care Clients Profiling and Planning' application. On the left, a sidebar menu includes 'Dashboard', 'Manage Users' (highlighted with a red arrow), 'Employee Records', 'Manage Service Rates', and 'Manage Funding Rates'. The main dashboard area shows 'Total Users: 7', 'Lockouts: 0', and 'Active Users: 1'. Below this is a table titled 'Instance Logs' with 14 rows of log entries:

Log ID	Time Stamp	Log Details
1	2024-10-04 21:16:14	An Assessment Report has been generated
2	2024-10-04 21:21:23	Megan Smith have successfully logged-in
3	2024-10-04 21:21:45	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
4	2024-10-04 21:21:57	Megan Smith have successfully logged-in
5	2024-10-04 21:22:31	Megan Smith have successfully logged-in
6	2024-10-04 21:23:13	An Assessment Report has been generated
7	2024-10-04 21:23:29	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
8	2024-10-04 21:23:43	A Case Report has been generated
9	2024-10-04 21:23:56	Cases Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample repo
10	2024-10-04 21:24:10	A Client Report has been generated
11	2024-10-04 21:24:29	Client Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample DB\S
12	2024-10-04 21:24:37	A Client Report has been generated
13	2024-10-04 21:25:21	Megan Smith have successfully logged-in
14	2024-10-04 21:28:23	mark adona have successfully logged-out

Home Care Clients Profiling and Planning

Hi bill ong

Logout

Dashboard

Manage Users

Employee Records

Manage Service Rates

Manage Funding Rates

Manage Users

Search Client Search

User ID	Employee Name	Status
10010	Megan Smith	Active
10011	Ana Brown	Active
10012	www Ben	Active
10013	mark adona	Active
10014	bill ong	Active
10015	bob ong	Active
10016	John Sins	Active

Select user to update

Personal Information

User ID: 10010	Emp ID: 12345
First Name: Megan	Last Name: Smith
Birthday: 10/3/2003	Zip Code: 1234
Address: Fake St	
Mobile: 0412345678	Email: msmith@gmail.com
Role: System Administra...	

User Account

Username: msmith
Password:
Reset

Update Deactivate Save Cancel

Home Care Clients Profiling and Planning

Hi bill ong

Logout

Dashboard

Manage Users

Employee Records

Manage Service Rates

Manage Funding Rates

Manage Users

Search Client Search

User ID	Employee Name	Status
10010	Megan Smith	Active
10011	Ana Brown	Active
10012	www Ben	Active
10013	mark adona	Active
10014	bill ong	Active
10015	bob ong	Active
10016	John Sins	Active

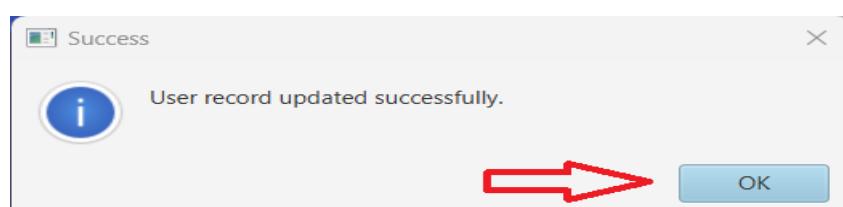
Personal Information

User ID: 10010	Emp ID: 12345
First Name: Megan	Last Name: Fox
Birthday: 10/3/2003	Zip Code: 1234
Address: Fake St	
Mobile: 0412345678	Email: msmith@gmail.com
Role: System Administra...	

User Account

Username: msmith
Password:
Reset

Update Deactivate
Save Cancel



- To deactivate an account, select from the user list the profile that you wish to deactivate then click the Deactivate Button. Follow the on-screen prompt to deactivate the user account.

Home Care Clients Profiling and Planning

Hi bill ong

Manage Users

Logout

Dashboard

Manage Users

Employee Records

Manage Service Rates

Manage Funding Rates

User ID	Employee Name	Status
10010	Megan Fox	Active
10011	Ana Brown	Active
10012	www Ben	Active
10013	mark adona	Active
10014	bill ong	Active
10015	bob ong	Active
10016	John Sins	Active

Select user to deactivate account

Personal Information

User ID:	10010	Emp ID:	12345
First Name:	Megan	Last Name:	Fox
Birthday:	10/3/2003	Zip Code:	1234
Address:	Fake St		
Mobile:	0412345678	Email:	msmith@gmail.com
Role:	System Administra...		

User Account

Username:	msmith
Password:	*****
Reset	

Update Deactivate Save Cancel



Home Care Clients Profiling and Planning

Hi bill ong

Manage Users

Logout

Dashboard

Manage Users

Employee Records

Manage Service Rates

Manage Funding Rates

User ID	Employee Name	Status
10010	Megan Fox	Active
10011	Ana Brown	Active
10012	www Ben	Active
10013	mark adona	Active
10014	bill ong	Active
10015	bob ong	Active
10016	John Sins	Active

Personal Information

User ID:	10010	Emp ID:	12345
First Name:	Megan	Last Name:	Fox
Birthday:	10/3/2003	Zip Code:	1234
Address:	Fake St		
Mobile:	0412345678	Email:	msmith@gmail.com
Role:	System Administra...		

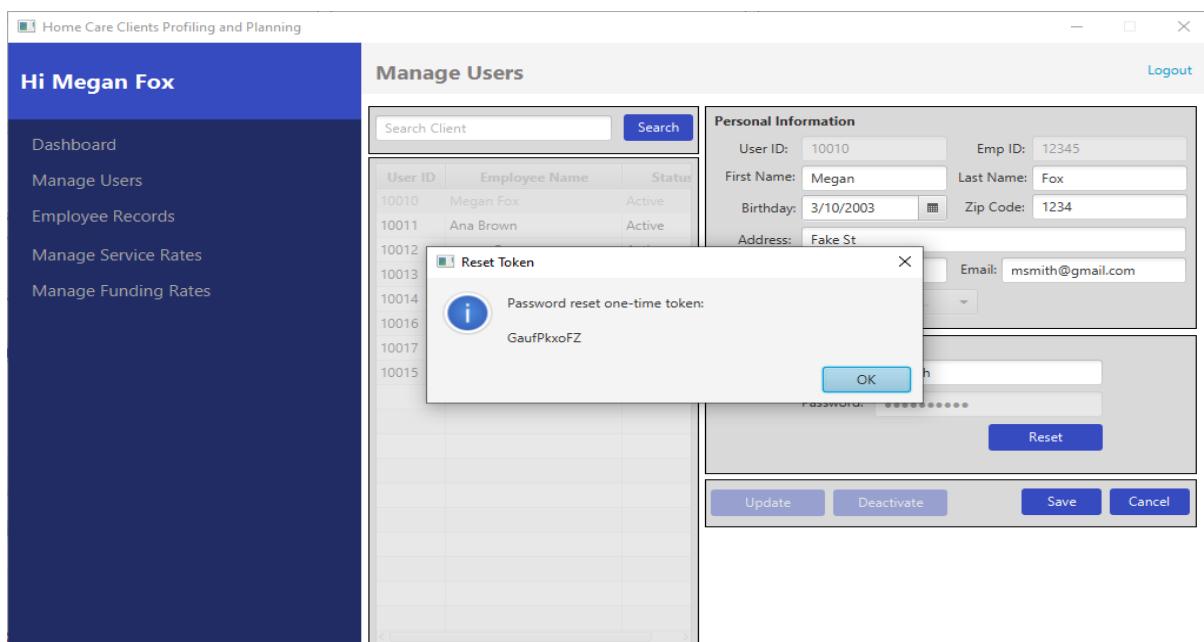
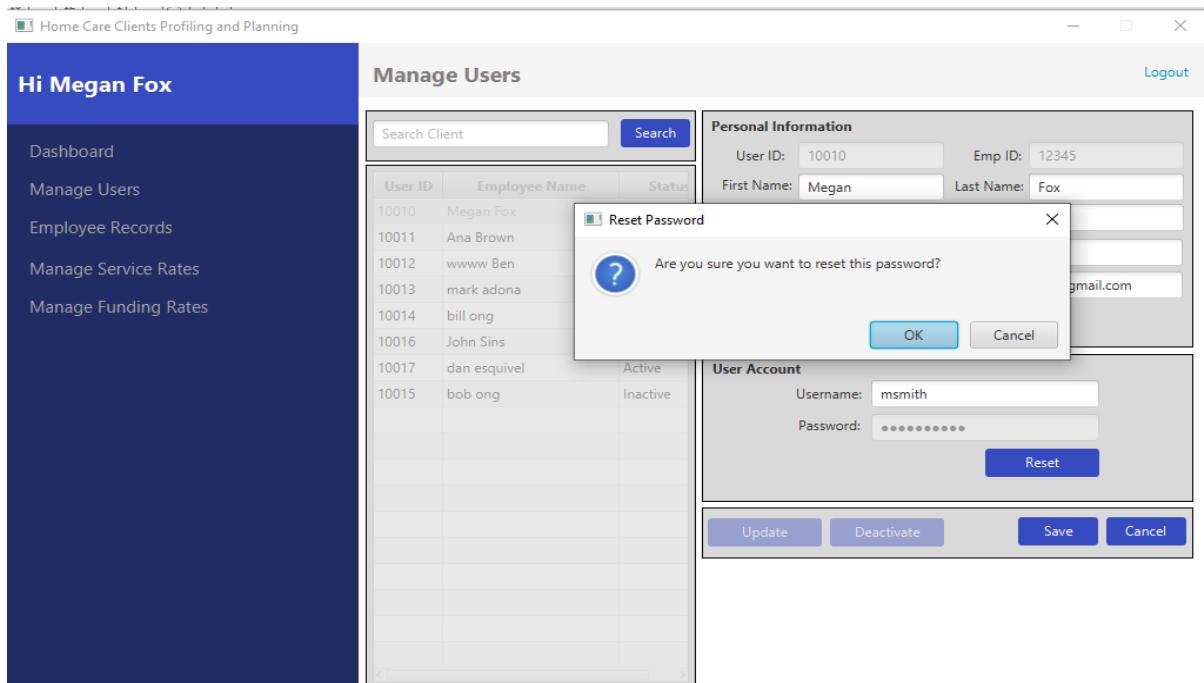
User Account

Username:	msmith
Password:	*****
Reset	

Update Deactivate Save Cancel



- To reset the password, select from the user list the profile then click on Update button then click Reset Button. This will generate a onetime key which will be used by the user to change their password.



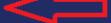
• Employee Management

- To retire an employee on record, click on the Employee Record on the left panel menu. Select an employee from the list and click on retire. Follow the on-screen prompts to confirm record retirement.

Home Care Clients Profiling and Planning

Hi bill ong

Logout

- Dashboard
- Manage Users
- Employee Records 
- Manage Service Rates
- Manage Funding Rates

Manage Employee Records

Employee ID	Employee Name	Employment Status	Start Date	End
1	Patr1	Inactive	2024-10-03	2024-10-03
2	Ana	Active	2018-10-24	Employed
123	bill	Active	2024-10-04	Employed
1234	Bob	Active	2024-10-04	Employed
43211	Dan	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed

Retire **Add Employee** **Bulk Upload**

Manually Add Employee

Employee ID:
Employee Name:
Start Date: 

Bulk Upload Employee Data

Choose the New Employee List File **Choose File**
Please note that only CSV files are accepted.

Save **Cancel** **Upload** **Cancel**

Home Care Clients Profiling and Planning

Hi bill ong

Logout

- Dashboard
- Manage Users
- Employee Records 
- Manage Service Rates Select user to retire
- Manage Funding Rates

Manage Employee Records

Employee ID	Employee Name	Employment Status	Start Date	End
1	Patr1	Inactive	2024-10-03	2024-10-03
2	Ana	Active	2018-10-24	Employed
123	bill	Active	2024-10-04	Employed
1234	Bob	Active	2024-10-04	Employed
43211	Dan	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed

Retire **Add Employee** **Bulk Upload**

Manually Add Employee

Employee ID:
Employee Name:
Start Date: 

Bulk Upload Employee Data

Choose the New Employee List File **Choose File**
Please note that only CSV files are accepted.

Save **Cancel** **Upload** **Cancel**

Home Care Clients Profiling and Planning

Manage Employee Records

Logout

Hi bill ong

- Dashboard
- Manage Users
- Employee Records
- Manage Service Rates
- Manage Funding Rates

Employee ID	Employee Name	Employment Status	Start Date	End Date
1	Patr1	Inactive	2024-10-03	2024-10-03
2	Ana	Active	2018-10-24	Employed
123	bill	Active	2024-10-04	Employed
1234	Bob	Active	2024-10-04	Employed
43211	Dan	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed

Retire **Add Employee** **Bulk Upload**

Manually Add Employee

Employee ID:

Employee Name:

Start Date:

Bulk Upload Employee Data

Choose File

*Choose the New Employee List File
Please note that only CSV files are accepted.*

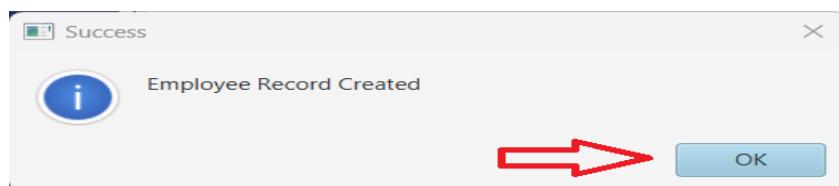
Save **Cancel** **Upload** **Cancel**



2. To manually add an employee on record, click on Add Employee. This will allow input of single employee on the record. click on Save to confirm record enrolment.

The screenshot shows the 'Manage Employee Records' interface. At the top, there is a table listing 12 employees with columns for Employee ID, Employee Name, Employment Status, Start Date, and End Date. Below the table are three buttons: Retire, Add Employee (highlighted with a red arrow), and Bulk Upload. Underneath these buttons is a 'Manually Add Employee' form with fields for Employee ID, Employee Name, and Start Date. To the right of the form is a 'Bulk Upload Employee Data' section with a file upload button and instructions. At the bottom are Save, Cancel, Upload, and Cancel buttons.

This screenshot is similar to the previous one but includes red arrows and text annotations. A red arrow points to the 'Manually Add Employee' button in the toolbar. Another red arrow points to the 'Employee ID' field in the 'Manually Add Employee' form. A third red arrow points to the 'Save' button at the bottom of the form. Text on the left side of the screen says 'Enter Employee ID, Name and Start Date details'.

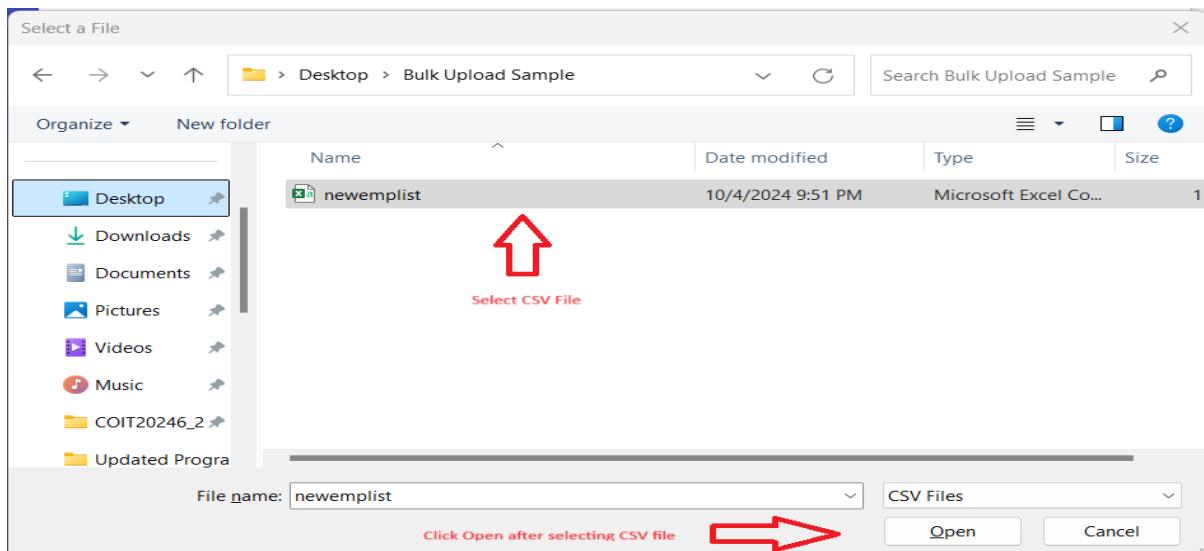


3. To import an alphalist, click on the Bulk Upload Button, this will allow uploading of a CSV file that contains employee record. Follow the on-screen instructions of choosing a file then click on upload. Confirm the data from the new window.

The screenshot shows the 'Manage Employee Records' interface. At the top, there is a table listing employees with columns for Employee ID, Employee Name, Employment Status, Start Date, and End Date. Below the table are three buttons: Retire, Add Employee, and Bulk Upload. A red arrow points to the Bulk Upload button. In the bottom right corner of the page, there are Save, Cancel, Upload, and Cancel buttons.

Employee ID	Employee Name	Employment Status	Start Date	End Date
67997	Lily	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed
110000030	James Anderson	Active	2022-01-22	Employed
110000031	Emma Thompson	Active	2021-03-17	Employed
110000032	Olivia Garcia	Active	2020-09-02	Employed
110000033	William Lee	Active	2021-05-25	Employed

This screenshot is identical to the one above, showing the 'Manage Employee Records' page. A red arrow points to the Bulk Upload button, and another red arrow points to the 'Choose File' button within the Bulk Upload Employee Data section.



Home Care Clients Profiling and Planning

Hi bill ong

Logout

Manage Employee Records

Employee ID	Employee Name	Employment Status	Start Date	End
67997	Lily	Active	2024-10-04	Employed
112233	John	Active	2024-10-04	Employed
110000026	Michael Brown	Active	2020-07-20	Employed
110000027	Sarah Taylor	Active	2021-11-10	Employed
110000028	David Wilson	Active	2019-04-14	Employed
110000029	Laura Martinez	Active	2020-12-05	Employed
110000030	James Anderson	Active	2022-01-22	Employed
110000031	Emma Thompson	Active	2021-03-17	Employed
110000032	Olivia Garcia	Active	2020-09-02	Employed
110000033	William Lee	Active	2021-05-25	Employed

Retire Add Employee Bulk Upload

Manually Add Employee

Employee ID:

Employee Name:

Start Date: 10/4/2024

Bulk Upload Employee Data

C:\Users\Billy Bausin\Desktop\Bulk Upload Choose File

Choose the New Employee List File
Please note that only CSV files are accepted.

Save Cancel Upload Cancel

Employee Data

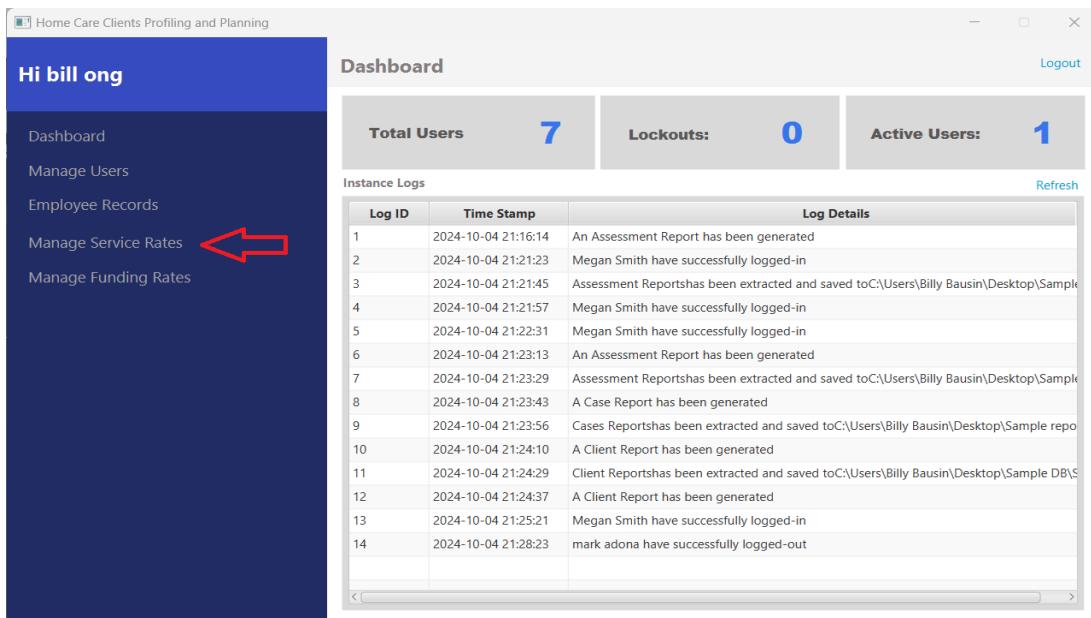
Employee List Bulk Upload

110000026, Michael Brown, 2020-07-20
110000027, Sarah Taylor, 2021-11-10
110000028, David Wilson, 2019-04-14
110000029, Laura Martinez, 2020-12-05
110000030, James Anderson, 2022-01-22
110000031, Emma Thompson, 2021-03-17
110000032, Olivia Garcia, 2020-09-02
110000033, William Lee, 2021-05-25
110000034, Isabella Harris, 2019-10-13
110000035, Benjamin Clark, 2022-02-28

Confirm Cancel

- **Manage Rates**

1. To update the Service Rates, click on the side panel menu. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update.



Services Offered

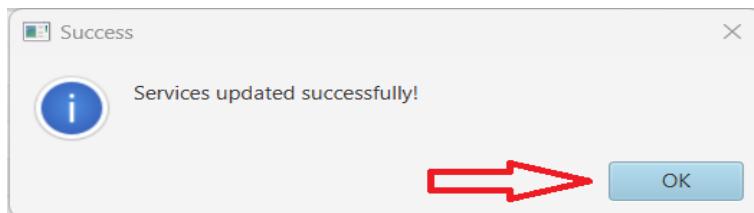
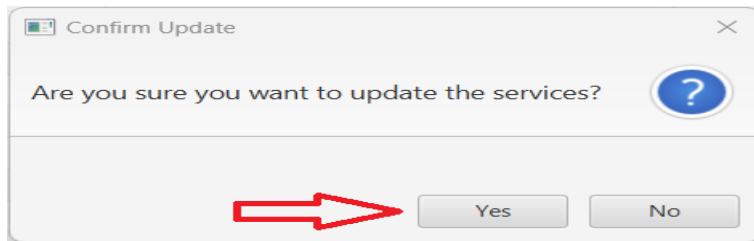
Services Cost Adjustments

Service ID	Service Description	Rate
CA	Community Access	67.0
CM	Care Management	0.2
DA	Domestic Assistance1	67.0
KM	Kilometre Allowance	1.4
MP	Meal Preparation	67.0
PCA	Personal Care Assistance	67.0
PM	Package Management	0.15
SSG	Social Support	100.0
TA	Transport Assistance	67.0

Select Service to update then press Enter key

Click the save button after updating the service

Save Cancel



2. To update the Funding Rates, click on the side panel menu. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update.

A screenshot of a software dashboard titled 'Home Care Clients Profiling and Planning'. The sidebar on the left shows 'Hi bill ong' and a list of options: Dashboard, Manage Users, Employee Records, Manage Service Rates, and Manage Funding Rates, with a red arrow pointing to it. The main area is a 'Dashboard' with statistics: Total Users 7, Lockouts: 0, Active Users: 1. Below is an 'Instance Logs' table with 14 entries. The table has columns for Log ID, Time Stamp, and Log Details.

Log ID	Time Stamp	Log Details
1	2024-10-04 21:16:14	An Assessment Report has been generated
2	2024-10-04 21:21:23	Megan Smith have successfully logged-in
3	2024-10-04 21:21:45	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
4	2024-10-04 21:21:57	Megan Smith have successfully logged-in
5	2024-10-04 21:22:31	Megan Smith have successfully logged-in
6	2024-10-04 21:23:13	An Assessment Report has been generated
7	2024-10-04 21:23:29	Assessment Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample
8	2024-10-04 21:23:43	A Case Report has been generated
9	2024-10-04 21:23:56	Cases Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample repo
10	2024-10-04 21:24:10	A Client Report has been generated
11	2024-10-04 21:24:29	Client Report has been extracted and saved to C:\Users\Billy Bausin\Desktop\Sample DB\S
12	2024-10-04 21:24:37	A Client Report has been generated
13	2024-10-04 21:25:21	Megan Smith have successfully logged-in
14	2024-10-04 21:28:23	mark adona have successfully logged-out

Services Offered

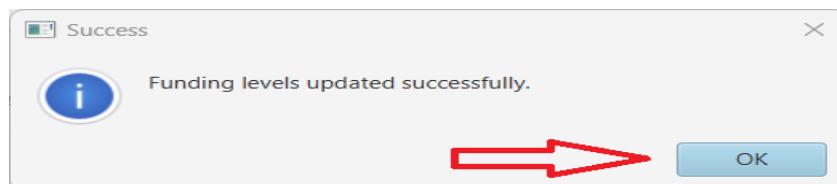
Funding Level Adjustments

Level ID	Daily Rate	Fortnightly Rate	Monthly Rate
Level 0	10000.0	1000000.0	99999.0
Level 1	29.01	406.14	812.28
Level 2	51.02	714.28	1428.56
Level 3	111.04	1554.56	0.0
Level 4	168.33	2356.62	4713.24

Select Rates to update and press Enter key

Click the Save button after updating the rates

Save **Cancel**



9. Error Messages

The system will display pop-up error messages when users encounter specific issues during their workflow. These error messages will immediately notify the user of any problems, providing instructions on how to address them. Error messages will appear in the following situations:

- **Failed login attempts:** If the user fails to log in after several attempts, an error message will appear, indicating the need to contact the **System Administrator** for a password reset.
- **Budget or care plan discrepancies:** When there are inconsistencies or errors in the budget or care plans, an error message will pop up, alerting the user to review and correct the information.
- **System updates or new feature releases:** When the system requires an update or a new feature is introduced that may affect user functionality, an error message will notify users of required actions (e.g., restarting the application).

These error messages will pop up as soon as the issue is detected, ensuring that users can address problems in real time. Once the issue is resolved, the message will automatically close or provide an option for users to proceed.

10. Troubleshooting

10.1 Common Issues

1. **Login Failures:**
 - Ensure correct username and password are used.
 - If you exceed the login attempt limit, contact your system administrator to reset your password.
2. **Case Assignment Errors:**
 - Make sure the CSO is registered in the system before assigning cases.
3. **System Performance Issues:**
 - If the system becomes slow or unresponsive, restart the application or your computer.

For any other issues, contact your system administrator.