USER'S MANUAL

HOME CARE CLIENT PROFILING AND PLANNING

04 October 2024

Contents

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.

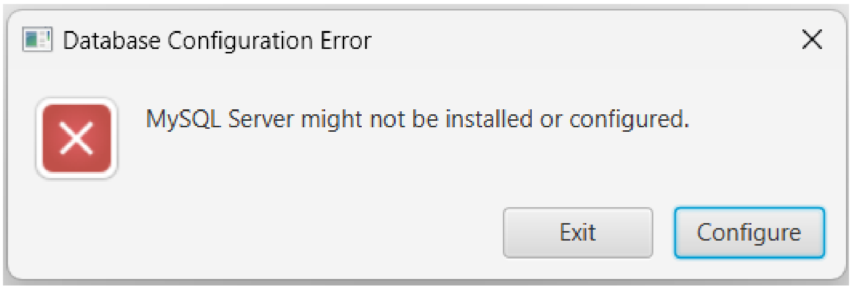
2. System Requirements

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

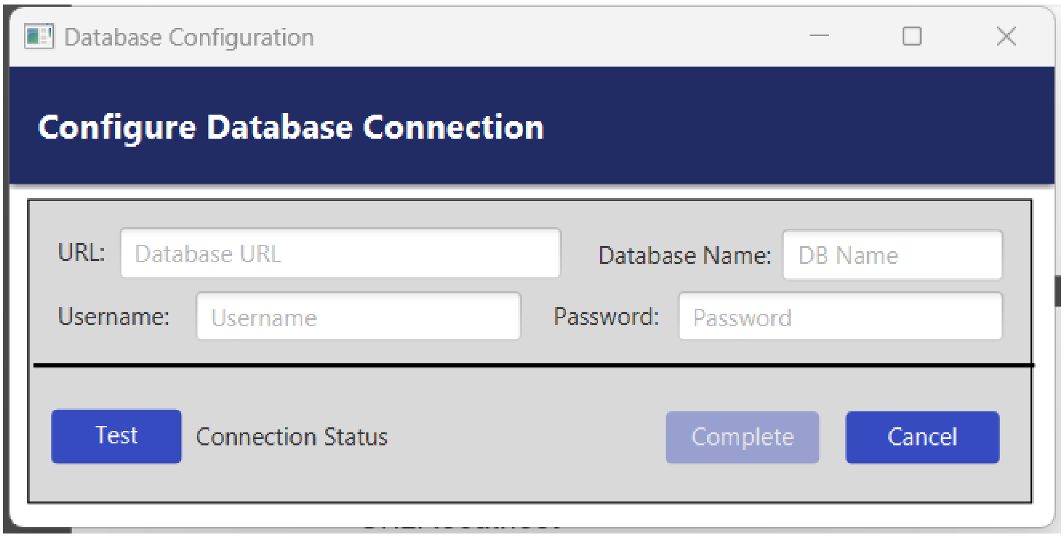
3. Execute and Configure

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.

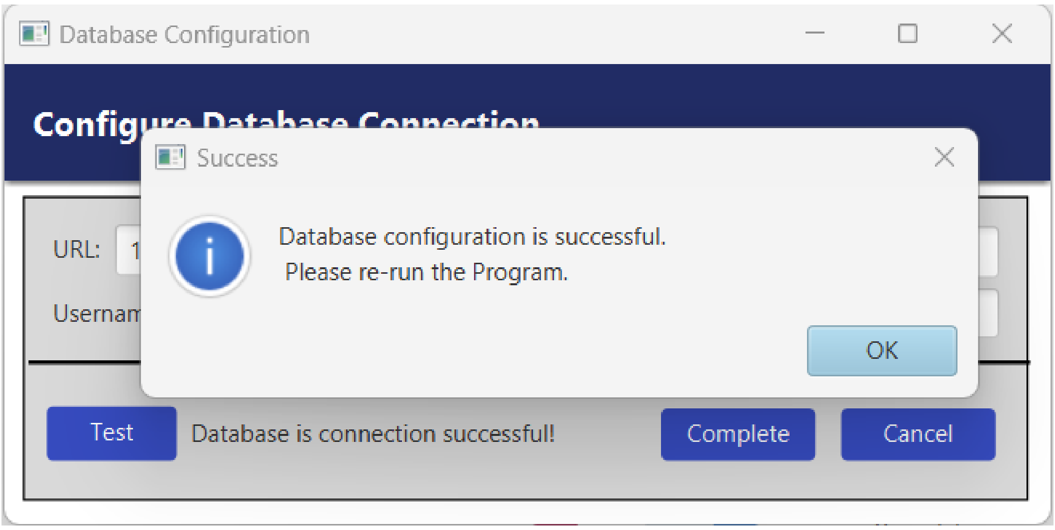


Default Settings

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



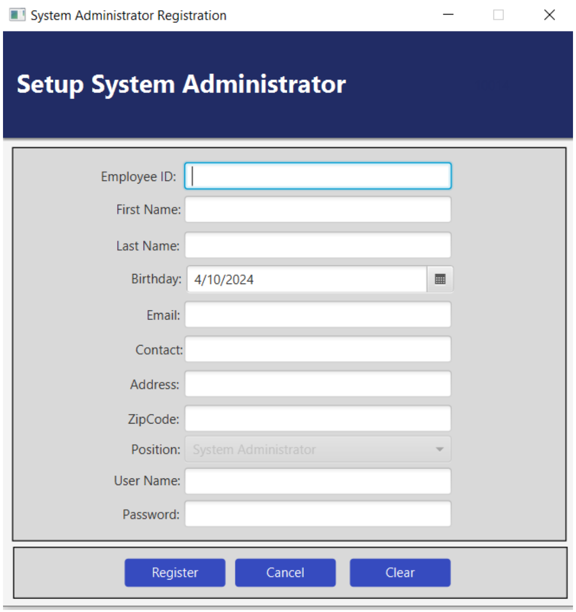
4. Test the Database connection by pressing Test Button.
5. When successful, click on complete and follow the on-screen instructions. If failed, double check the provided Database credentials.



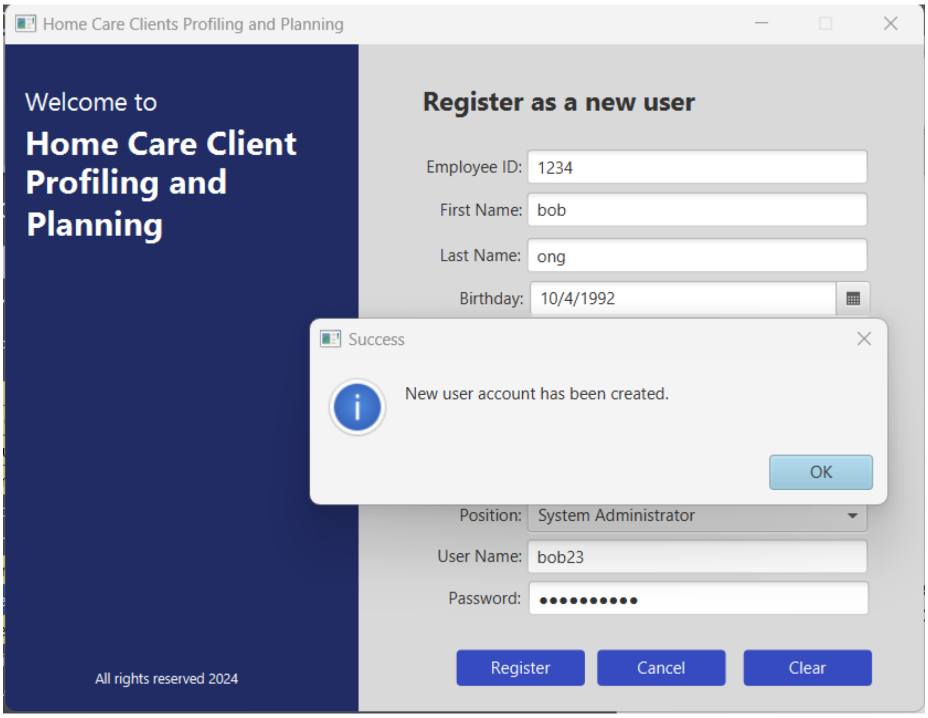
4. Logging in to the Application

System Administrator Registration and First-Time Login

1. 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.

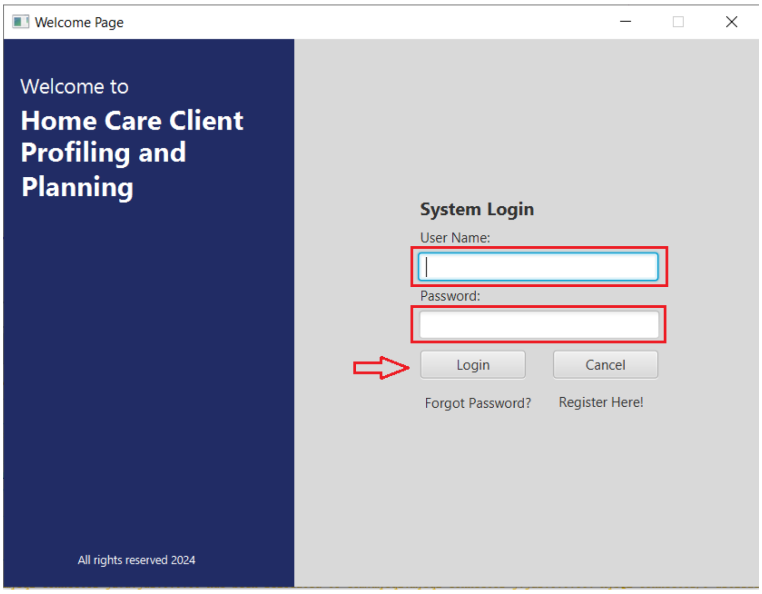


2. Fill all the fields and click on Register. Follow the on-screen validation prompts until the successful registration. Once registered, this automatically leads to system login.



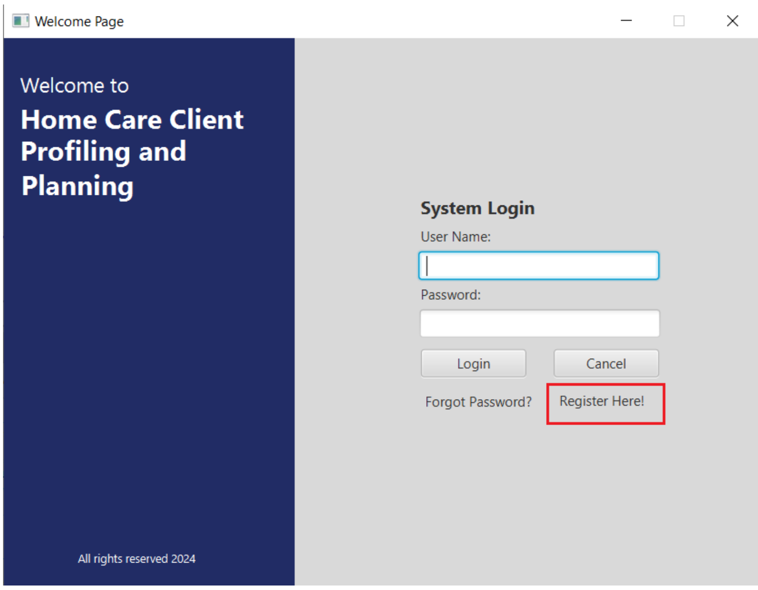
Subsequent Logins

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

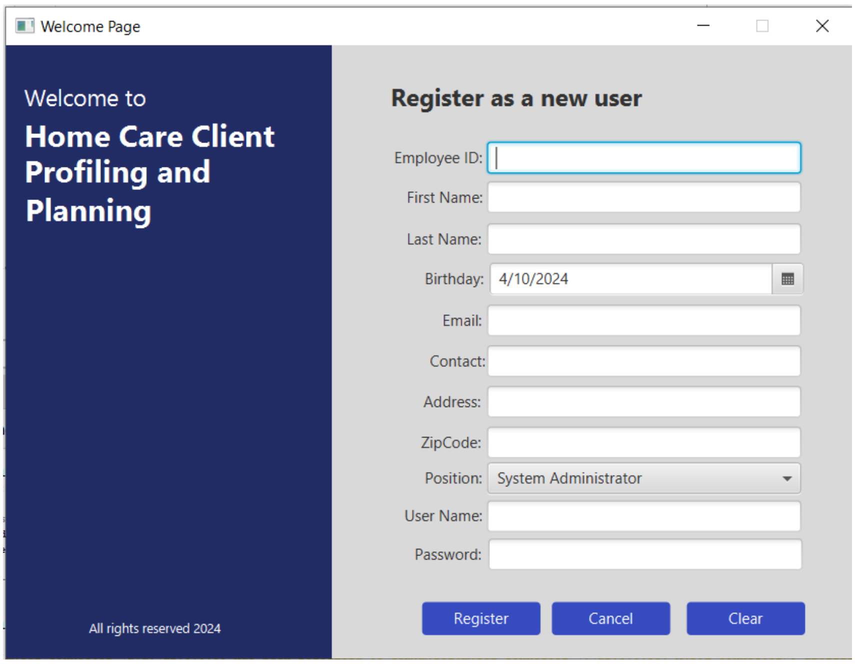


Subsequent User Registration

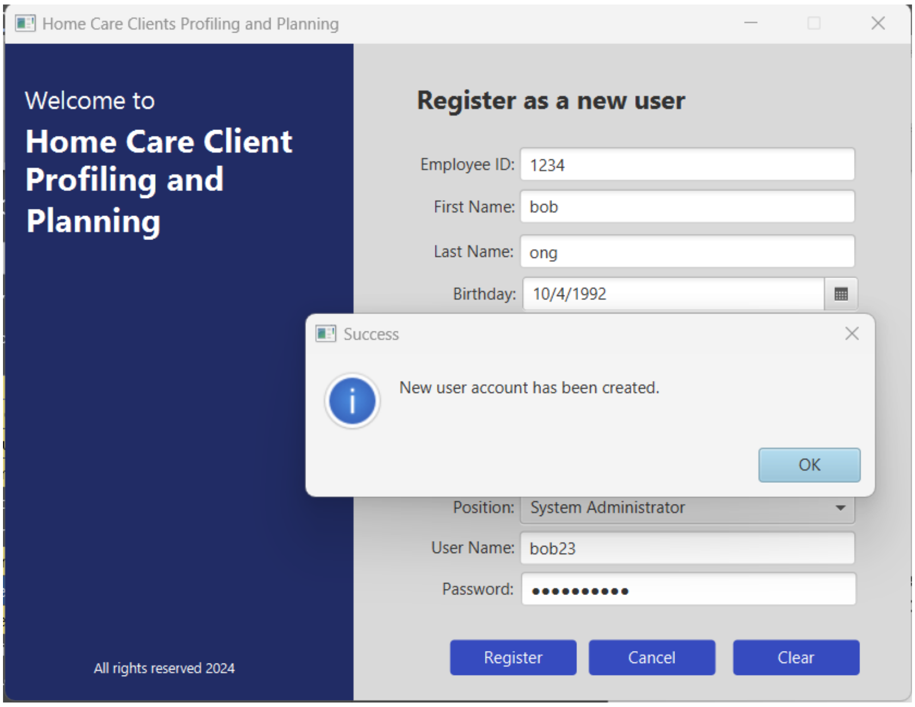
1. On the **Welcome Screen**, click **Register Here**.



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



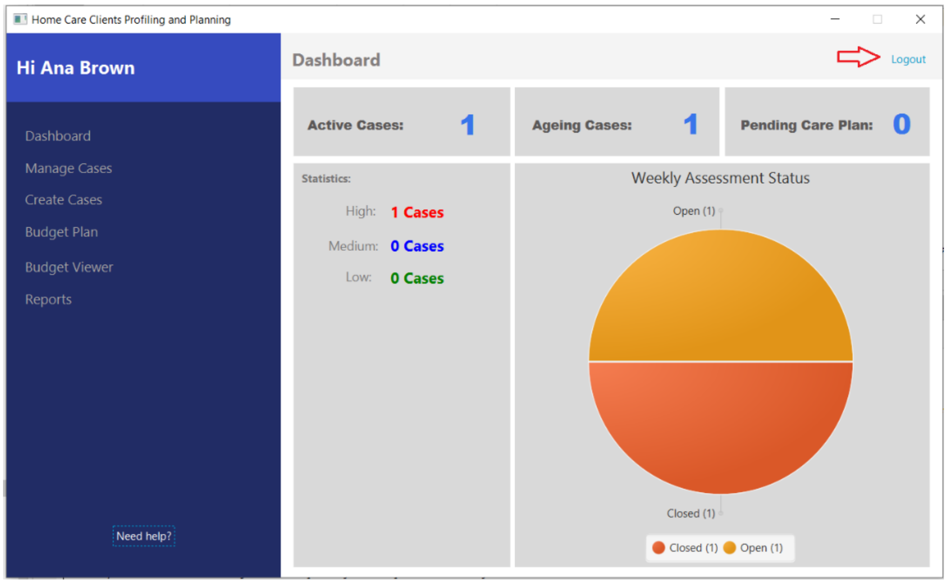
3. Once the account details are submitted, the system will generate a **new account** which can be used to navigate the system depending on the user role.



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

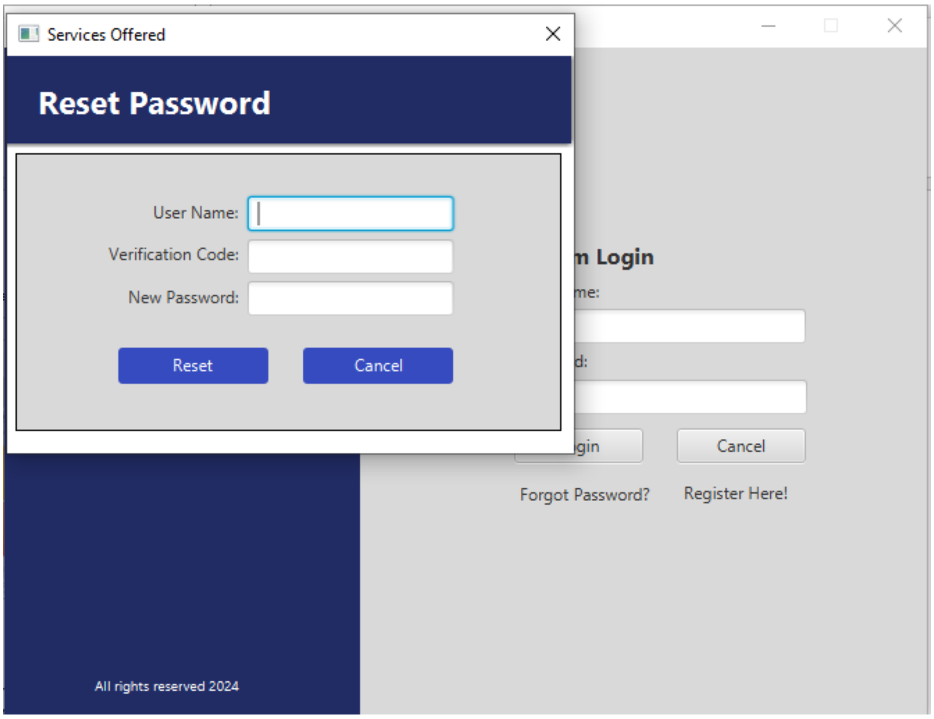
Logging out

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.



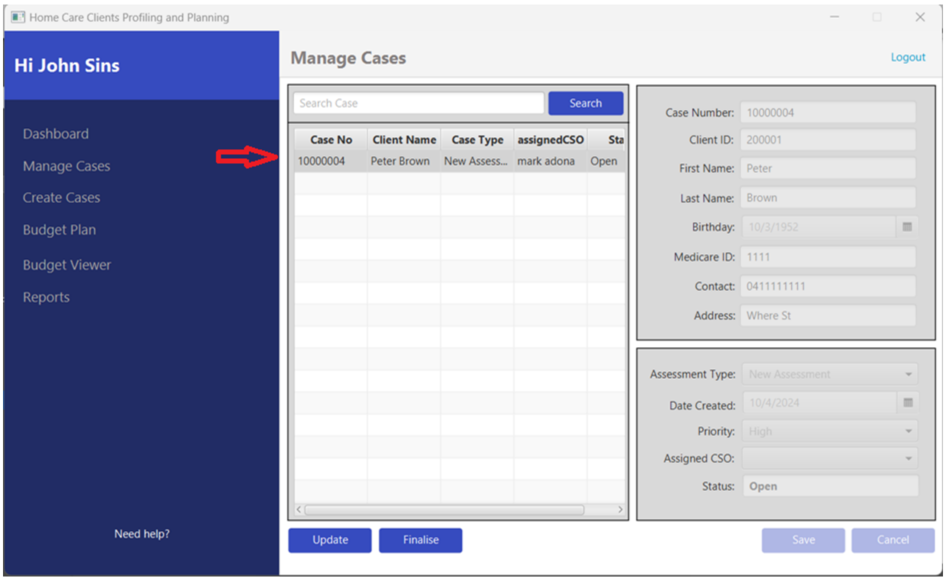
2. Click Reset to confirm the details and follow the on-screen instructions and confirmations.

5. User Roles and Responsibilities

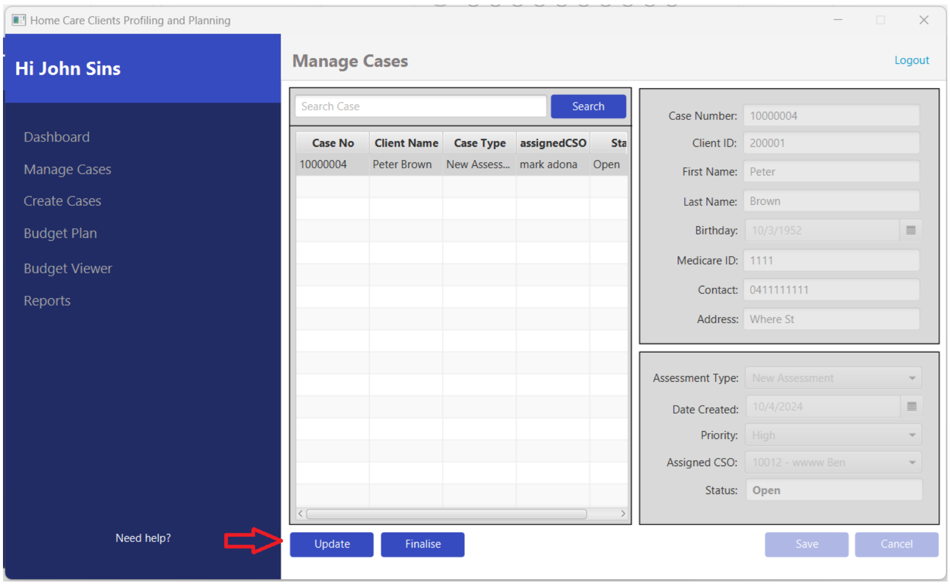
5.1 Case Manager

Managing Cases

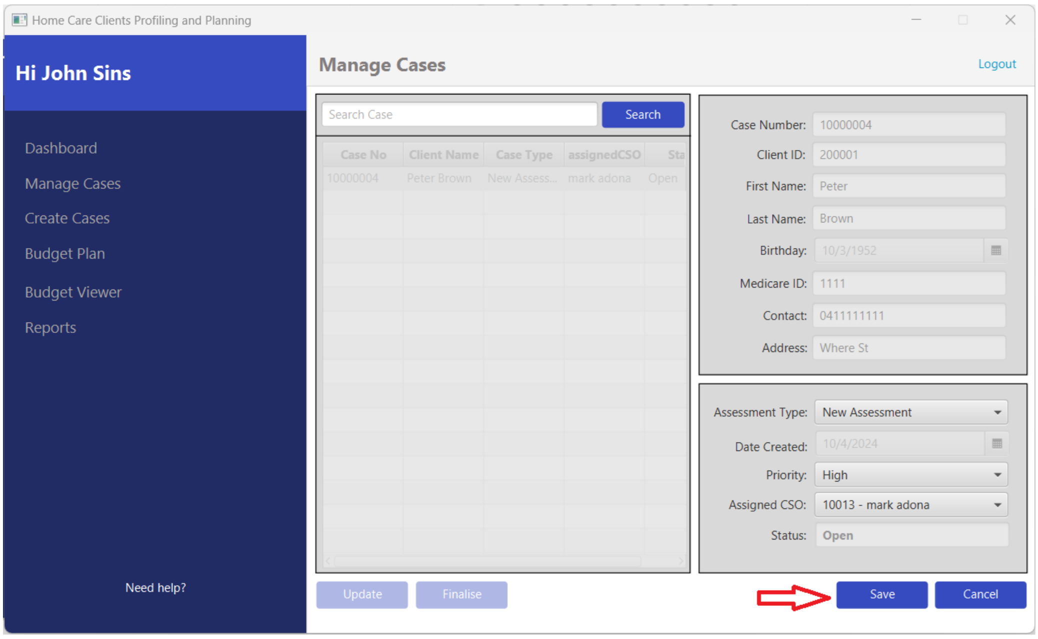
1. To manage the cases, navigate to Manage Case and select a case that you wish to manage.



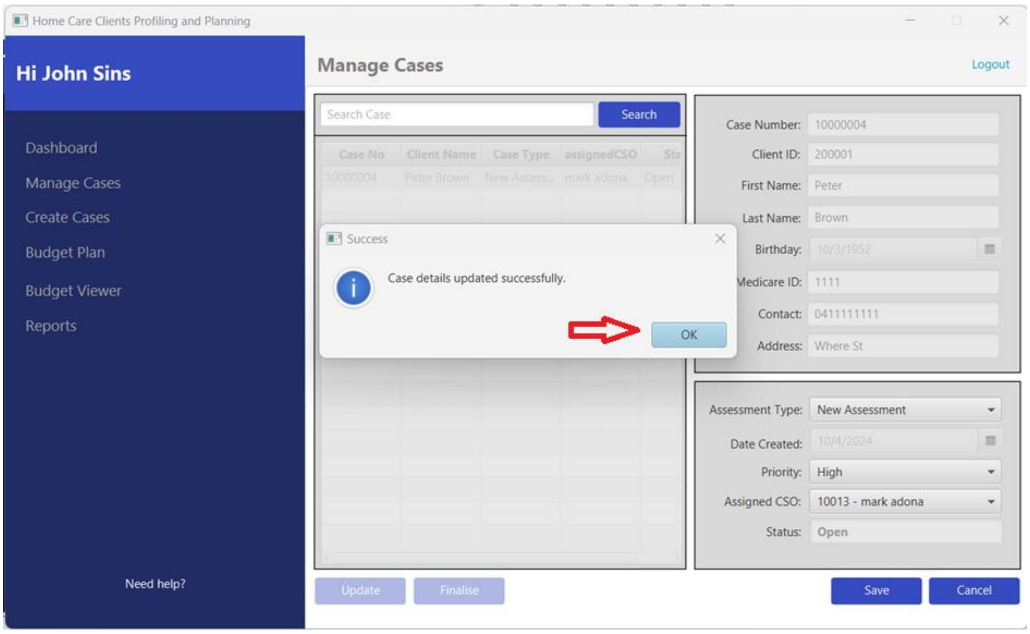
2. To update the Case Assignment, Priority Level and Assessment Type, click on the Update Button.



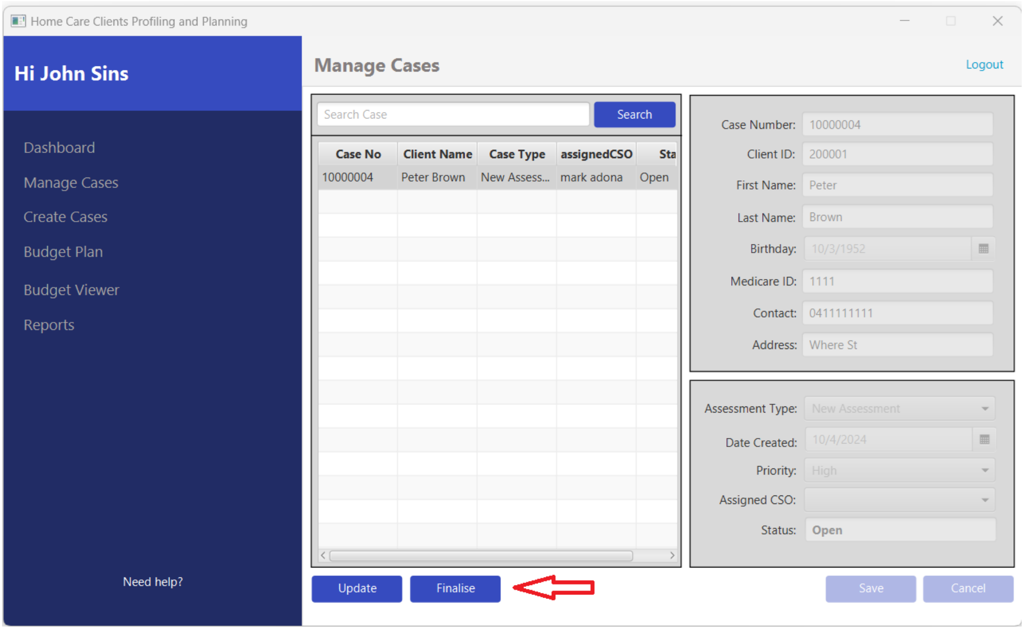
3. Change as necessary then click on save to complete.



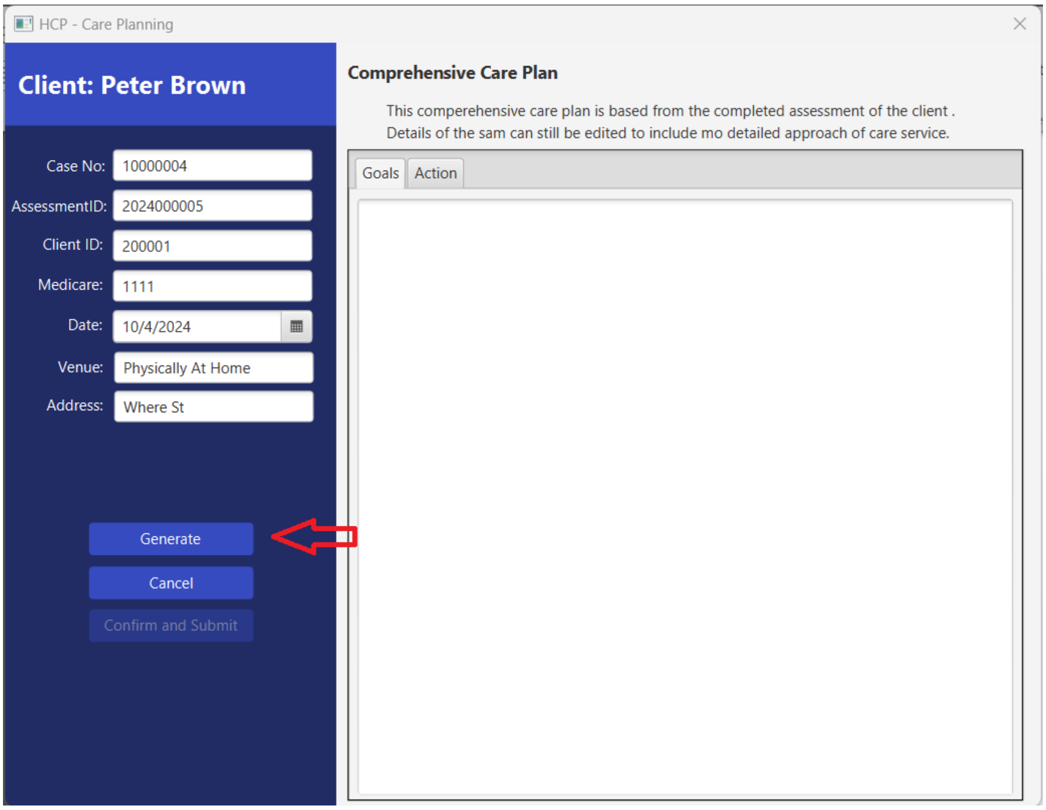
4. Confirmation dialog will prompt.

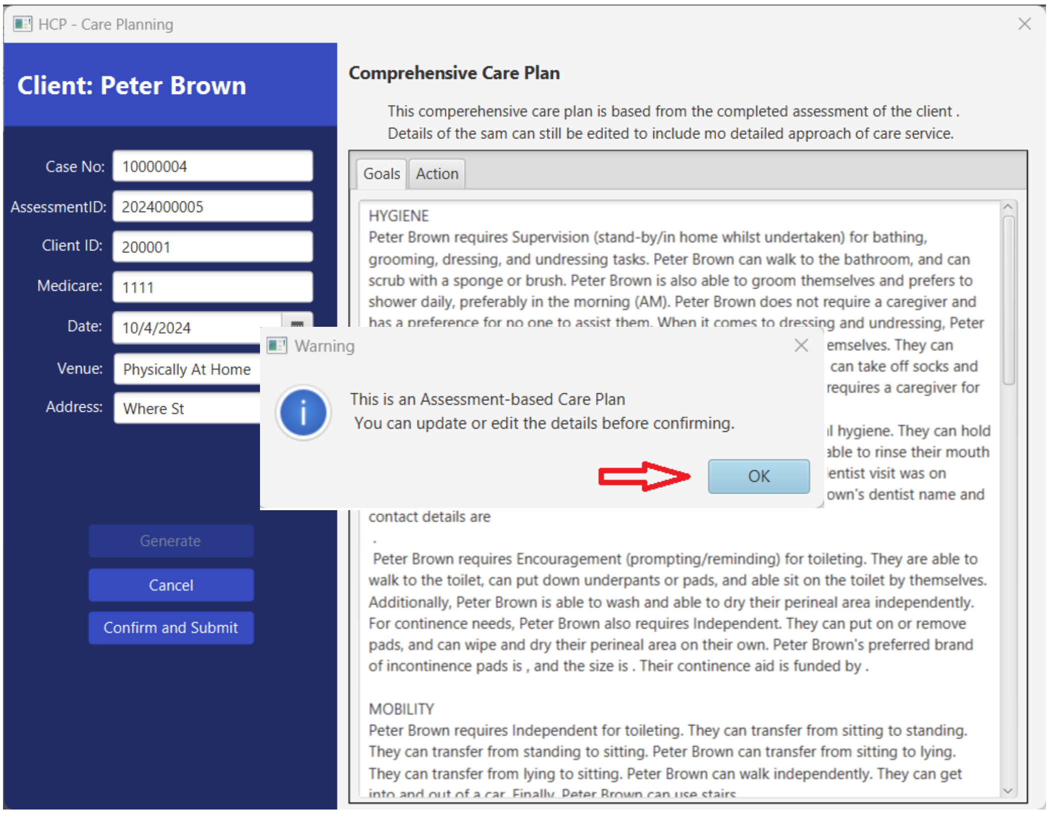


5. To Create Care Plan / Generate Care Plan, select a case from the table and click on Finalise Button. This will open a new window that will automatically generate a care plan.

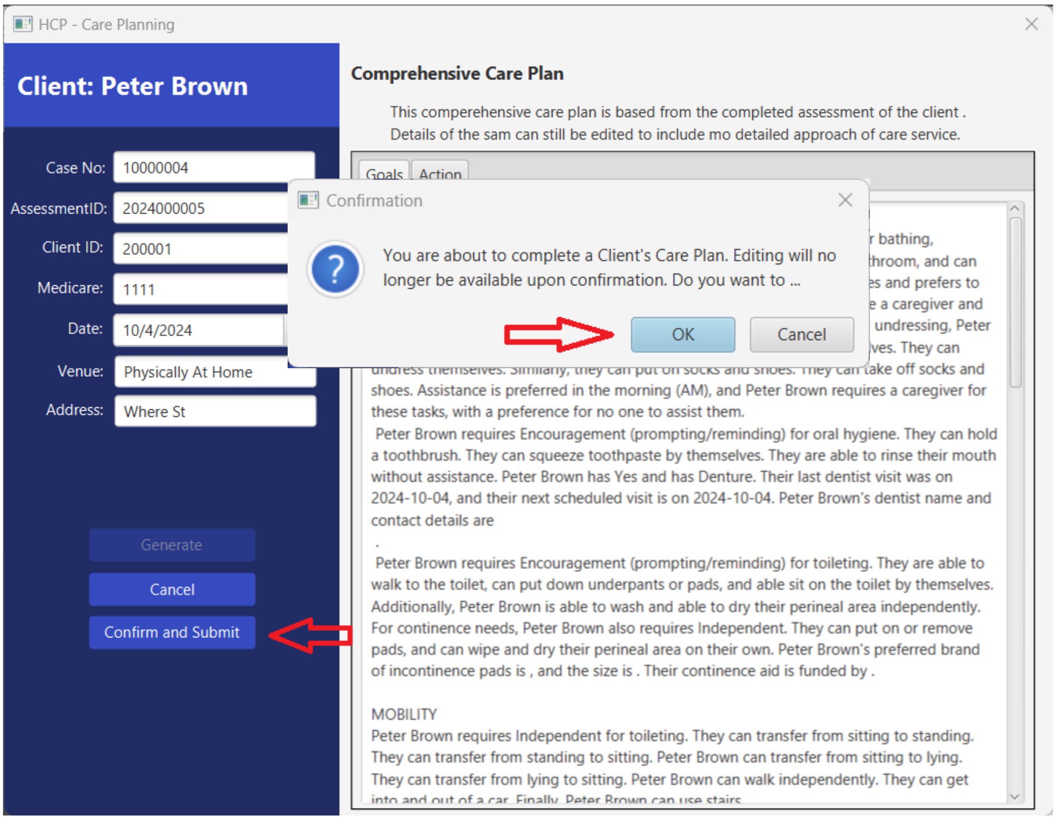


6. In the new window, click on Generate Button. This automates the generation of care plan. After generating, it will be enabled to allow updates from the user.

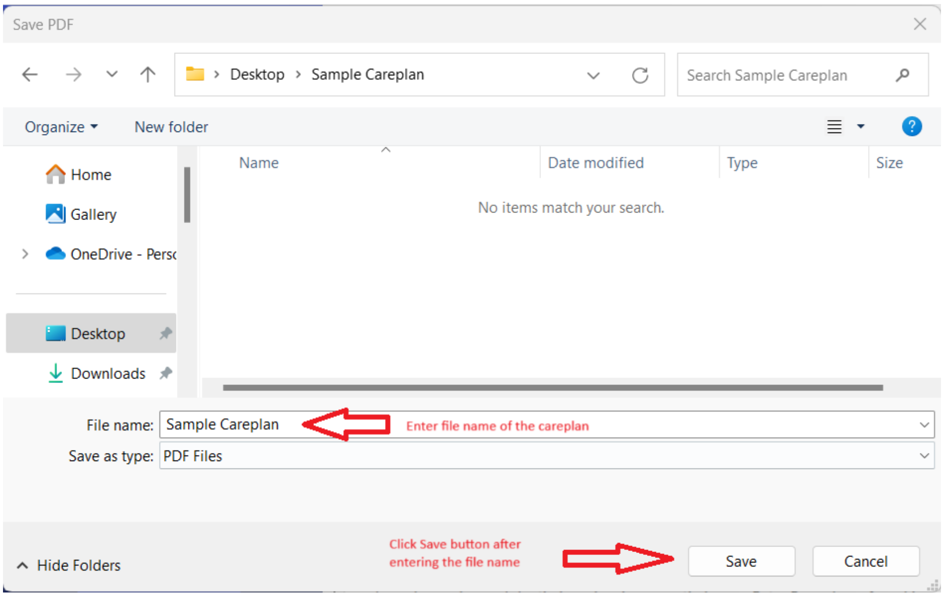


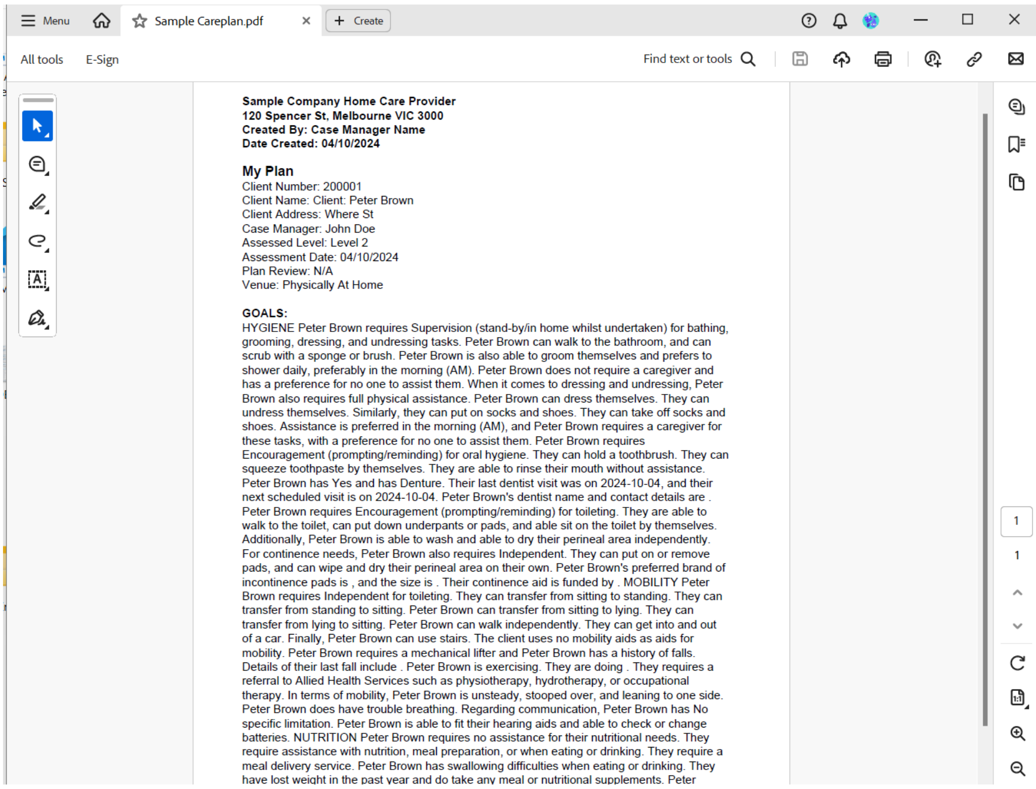


7. To confirm the generated Care Plan, click on confirm and submit button.



8. 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)





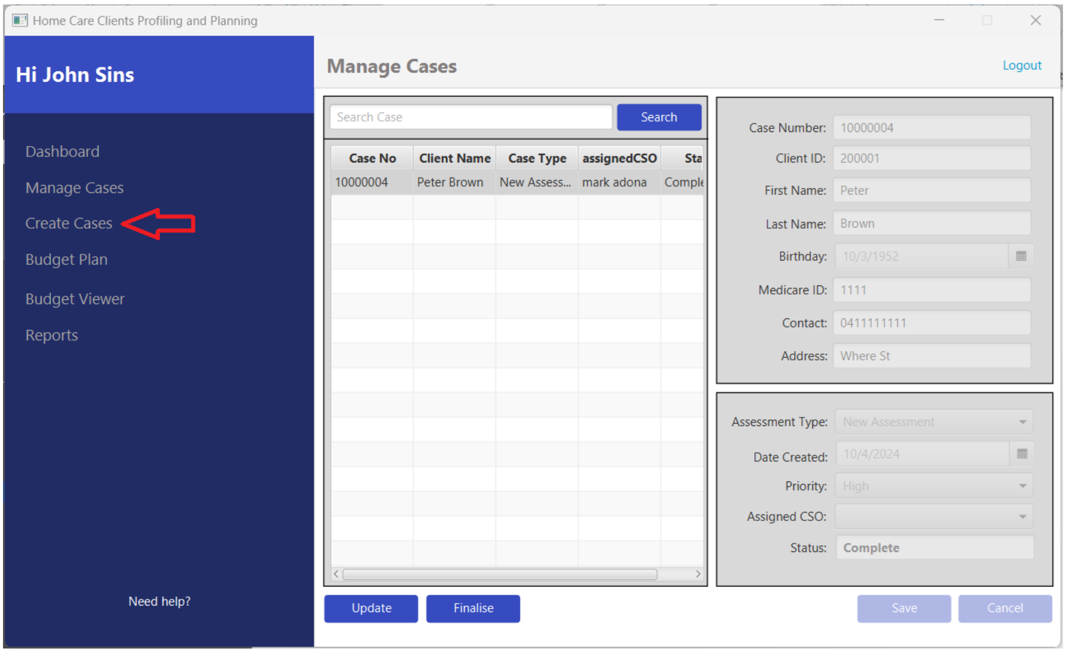
Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000
Created By: Case Manager Name
Date Created: 04/10/2024

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

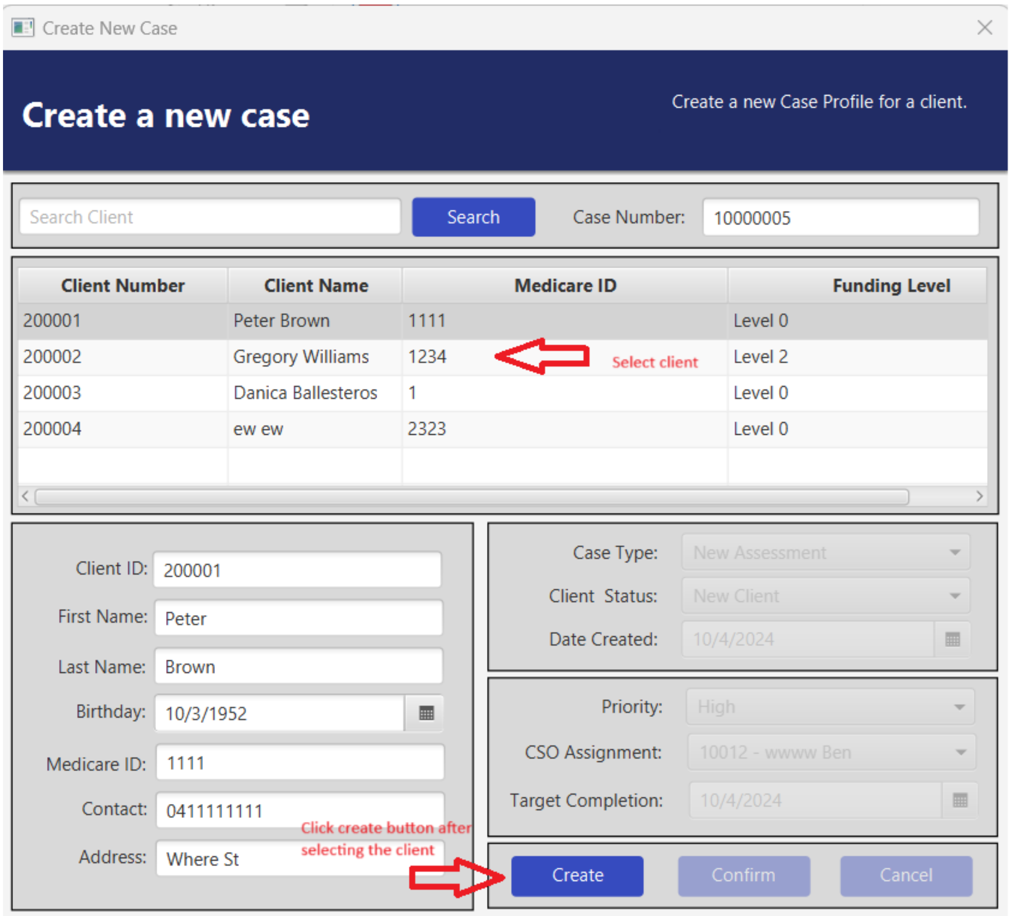
GOALS:
HYGIENE Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably 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

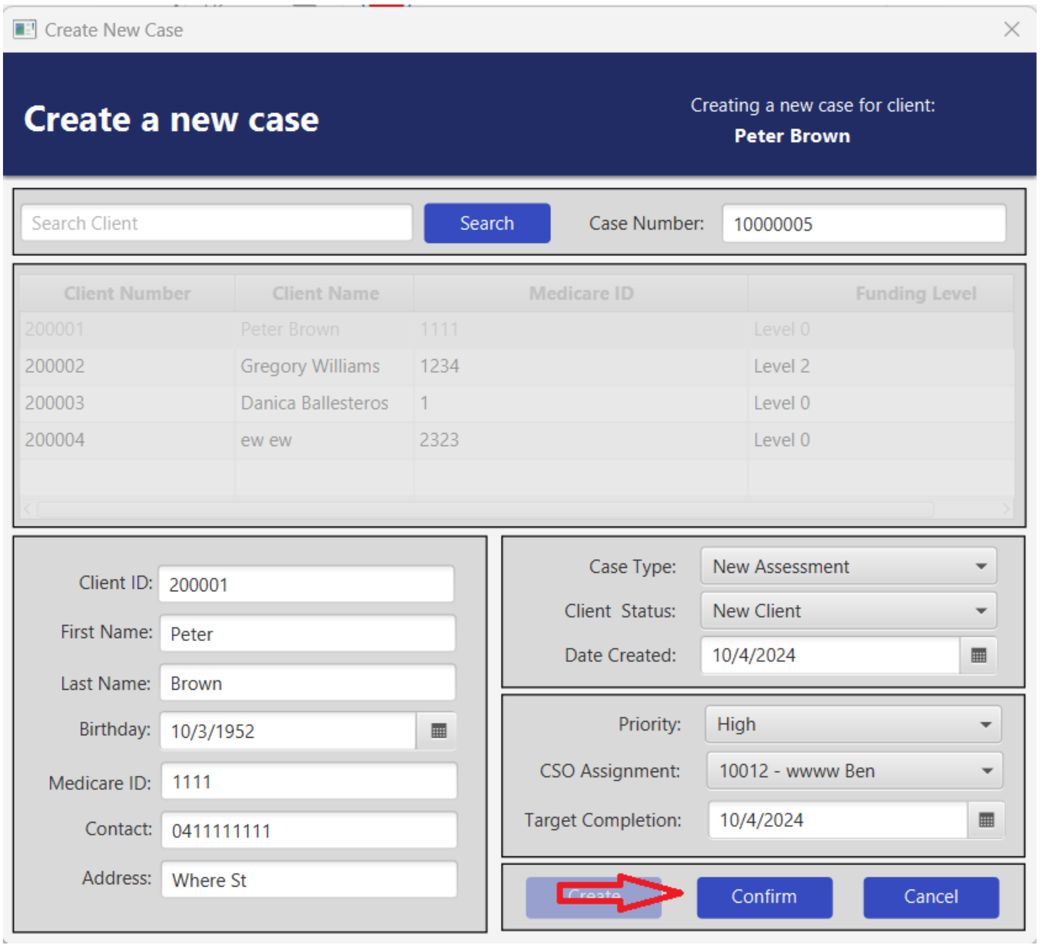
1. To create a new case, click on the Create Cases from the left panel menu. This will open a new window.



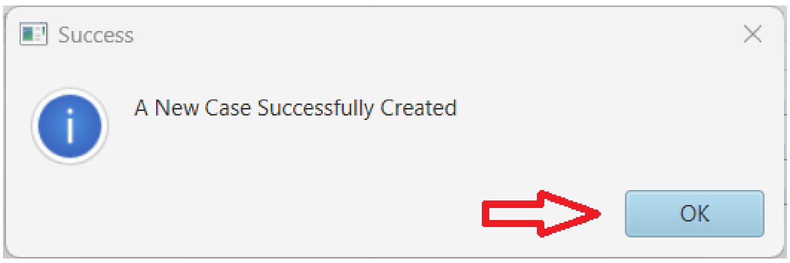
2. Select a client from the list and click on Create Button.



3. Manage the case information then click on the confirm button.

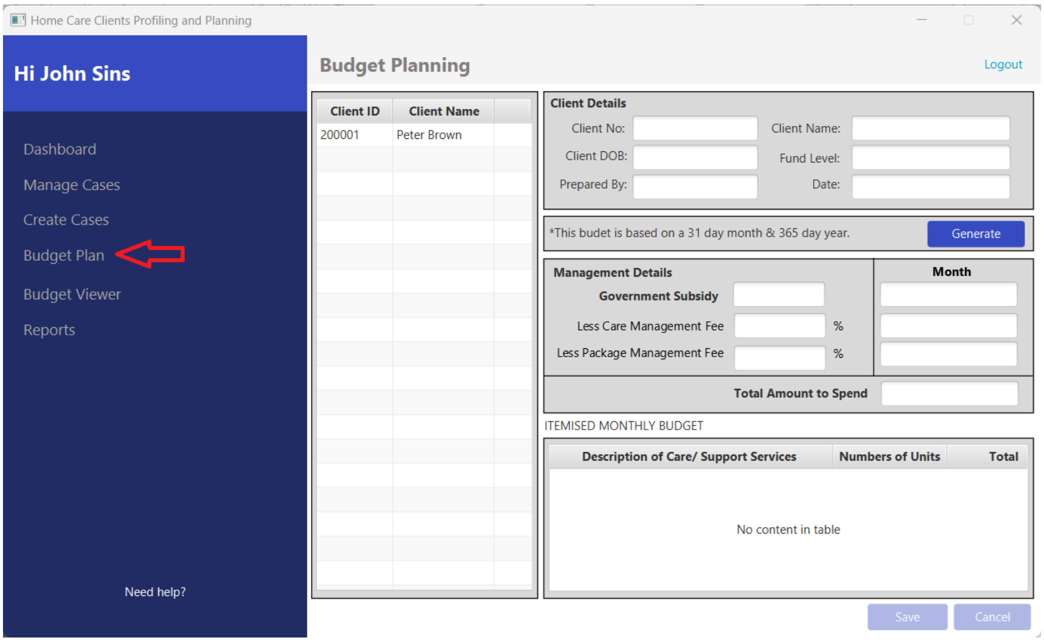


4. This will automatically create a new case for a specific and chosen client.

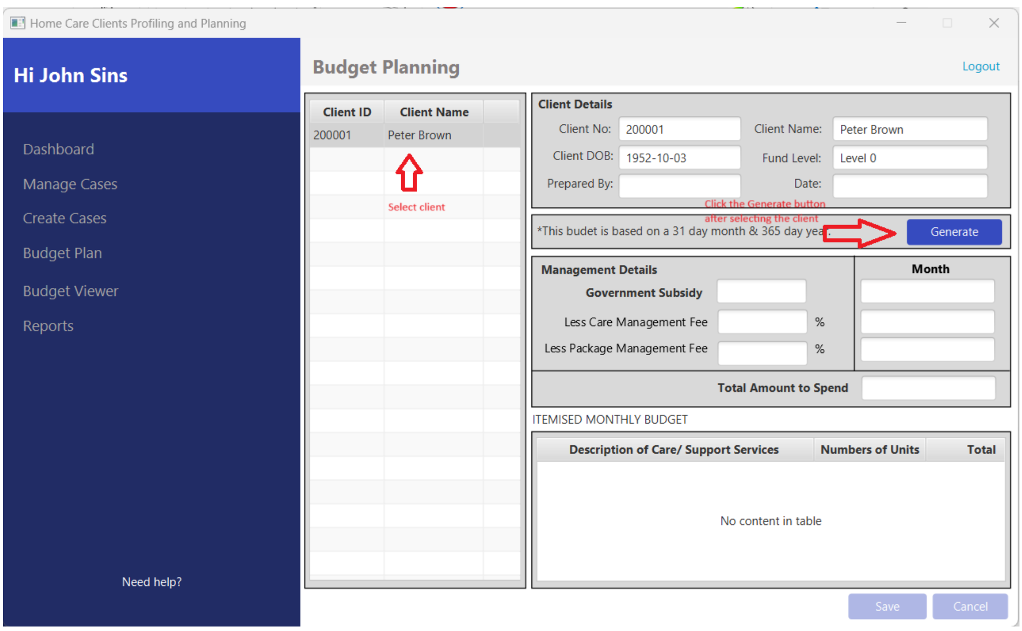


Budget Planning

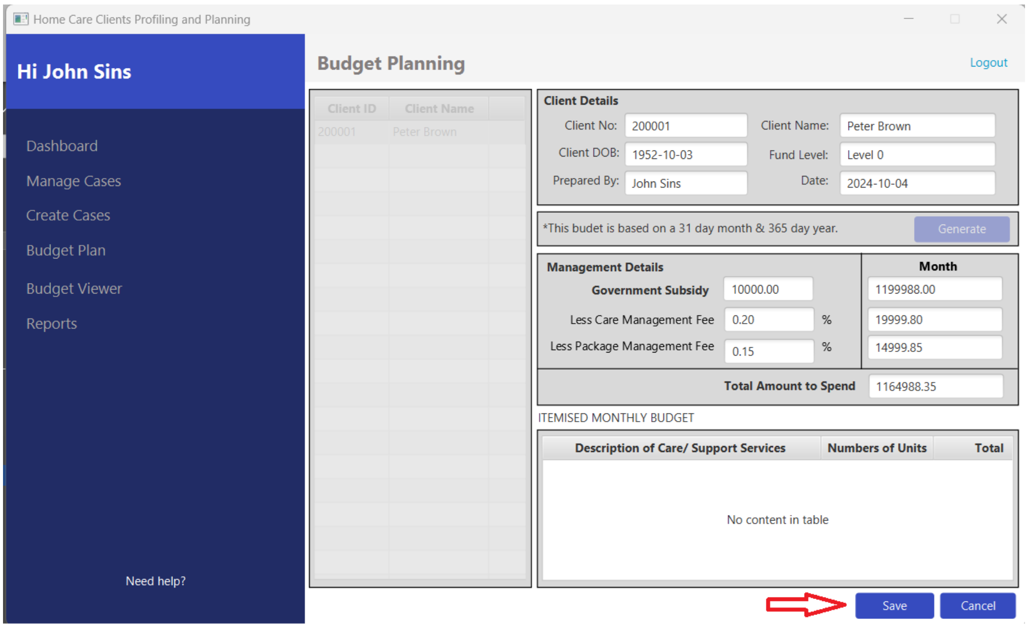
1. To create a new budget plan, navigate to the Budget Plan from the side menu.



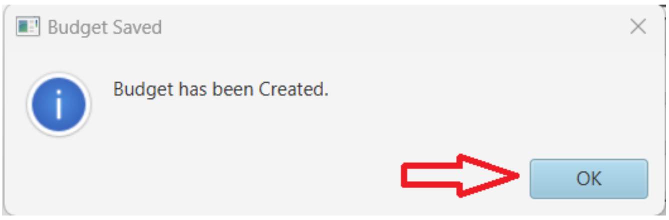
2. Select from the list of Ready for Budget clients then click on generate. This will automatically fill all the information on the screen



3. Click the save Buton to confirm the generated budget plan.



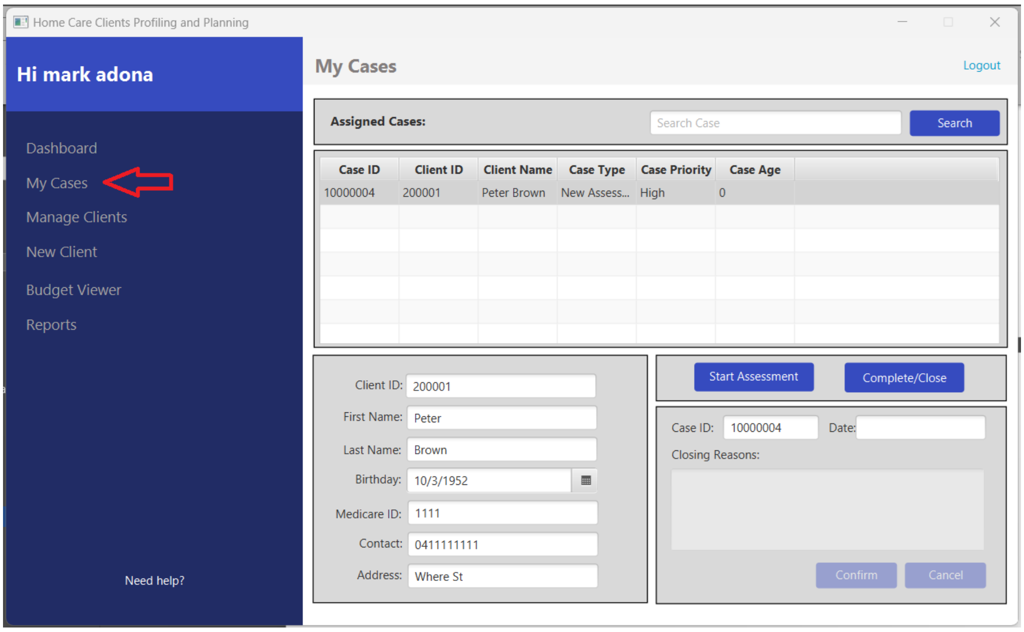
4. Prompts will be confirming the creation.



Client Services Officer (CSO)

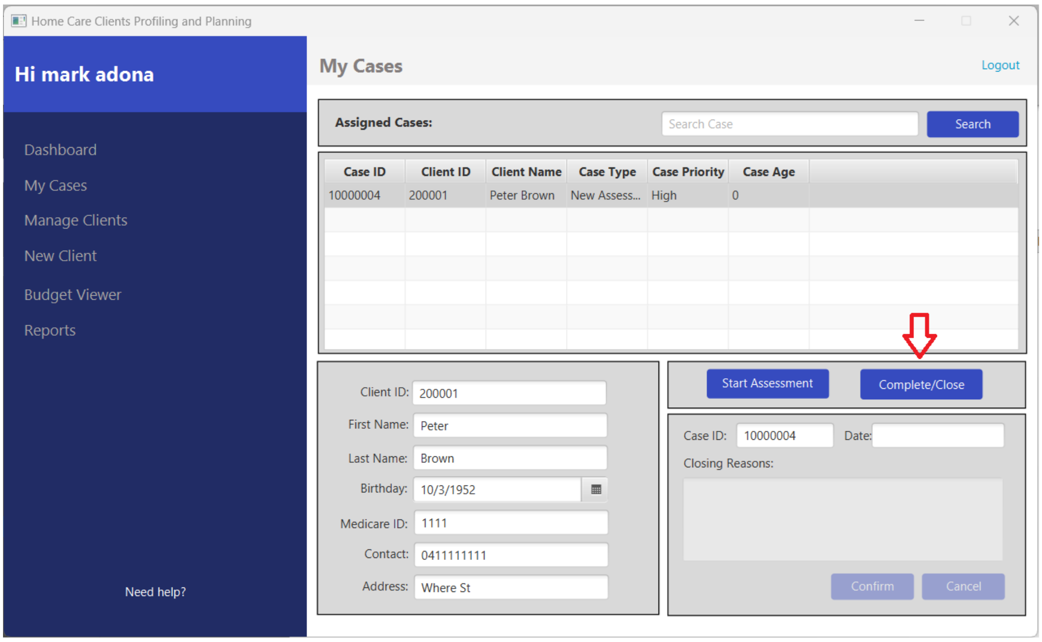
Manage Assigned Assessments

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

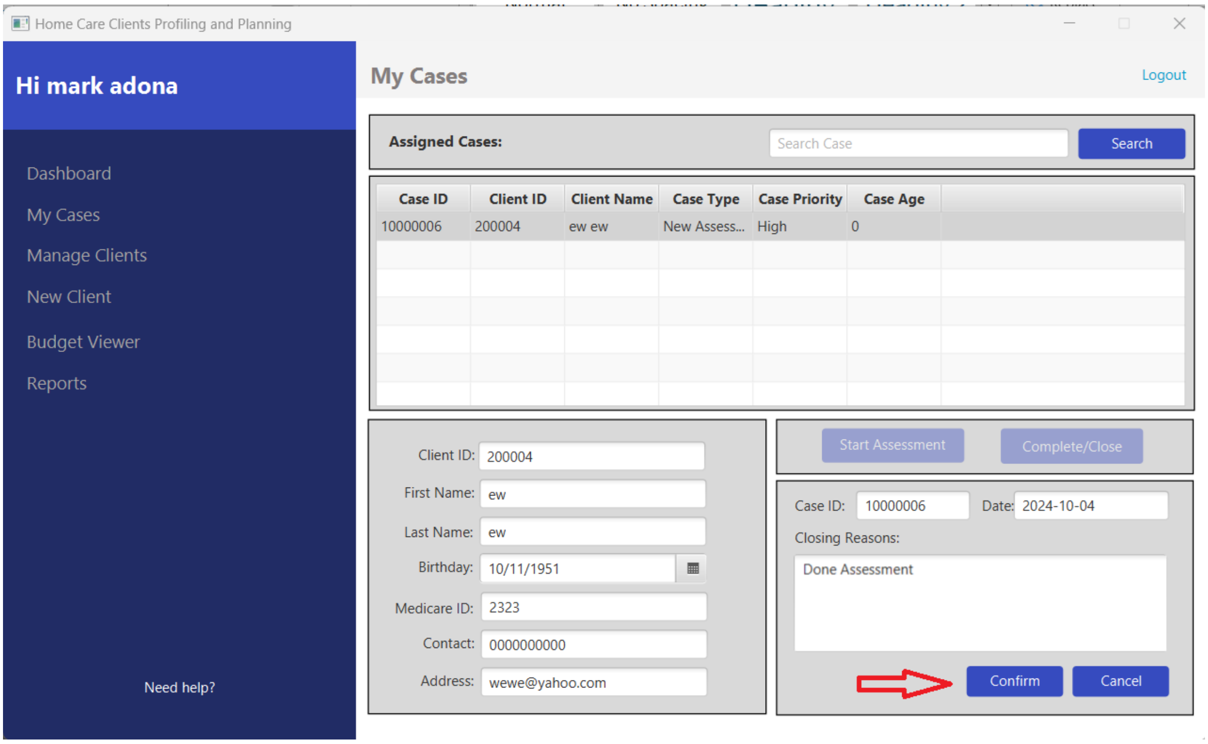


Closing a Case

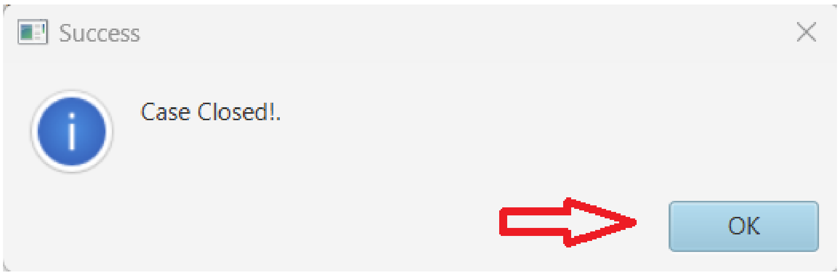
1. For any valid reason, click on the Complete/Close button to close the case. This will require you to add Closing Reasons to prior confirming the action. Select a client first and follow the prompts



2. Click on confirm button to close the case.

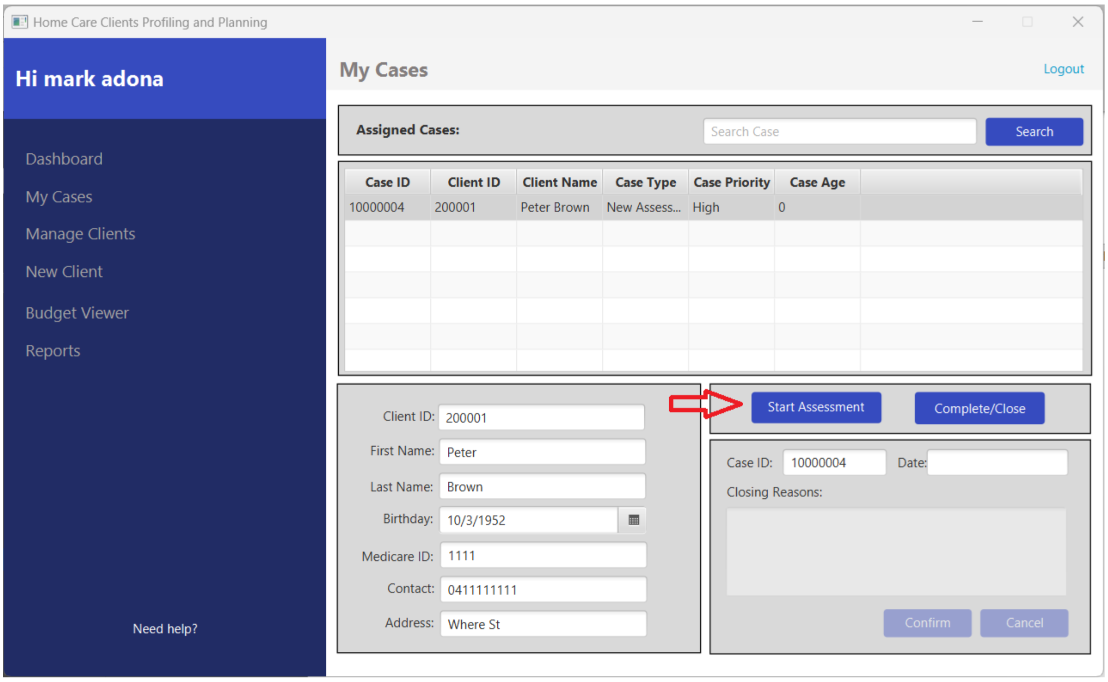


3. A confirmation message will appear.

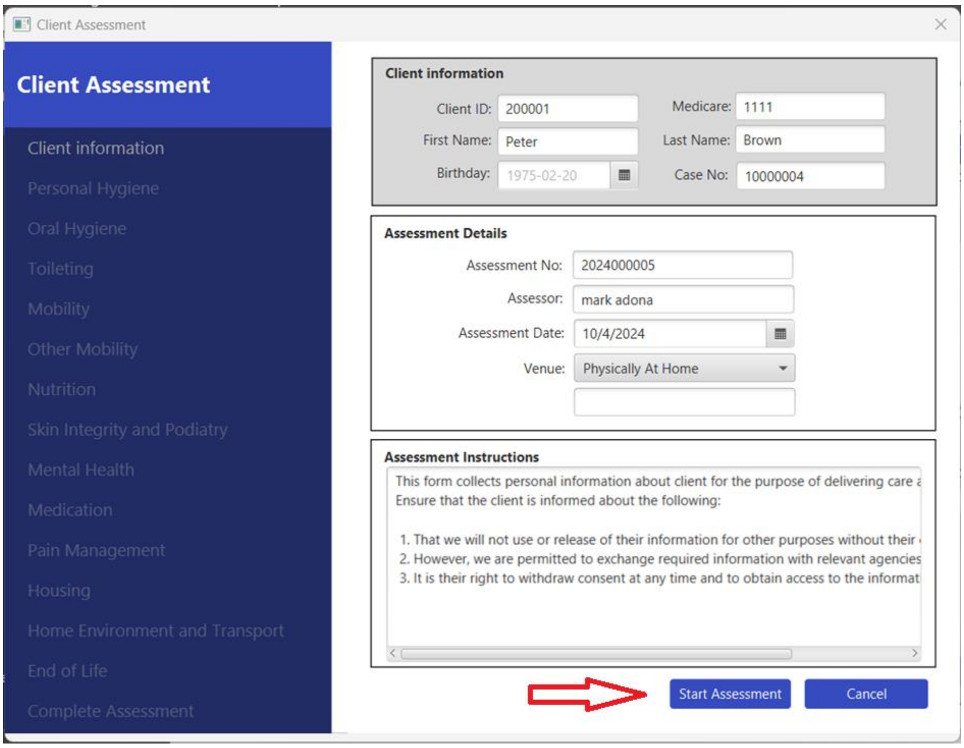


Making Assessments

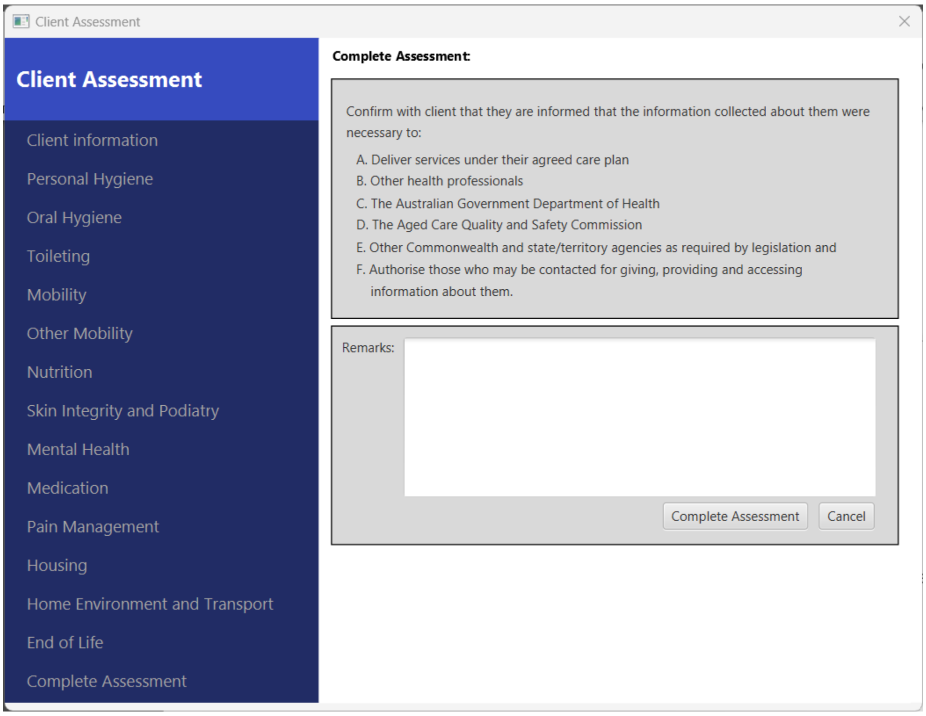
1. To proceed with the assessments, select a client entry from the table and click the Start Assessment.



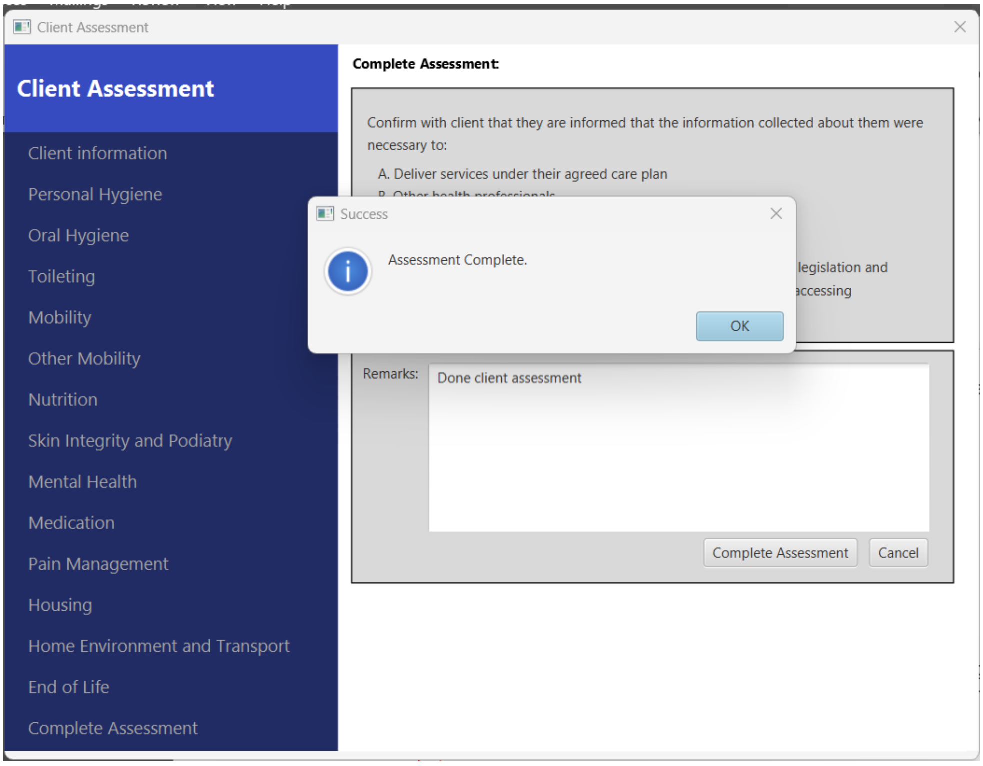
2. A new window will open which contain the client and case information. Follow the on-screen instructions to complete the assessment.



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

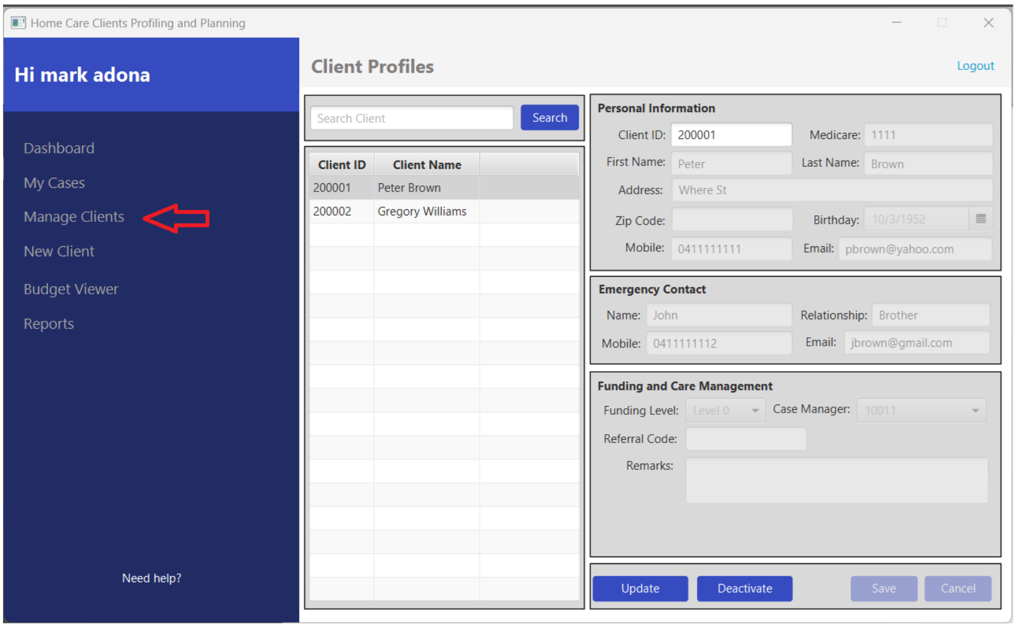


4. A dialog will pop up to confirm the successful completion of the assessment.

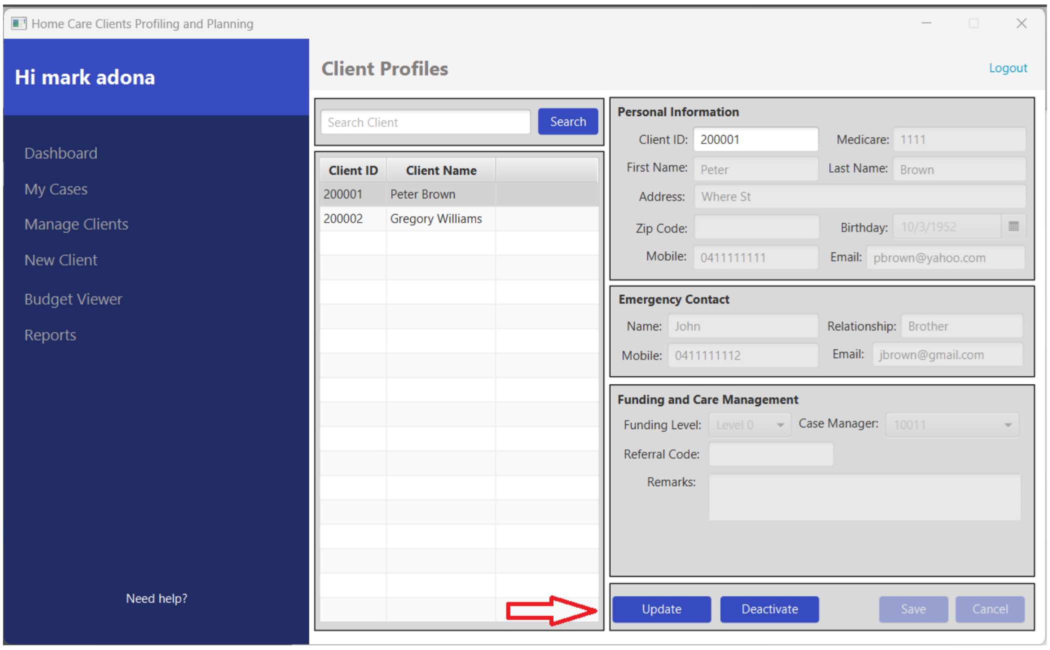


Client Profile Management

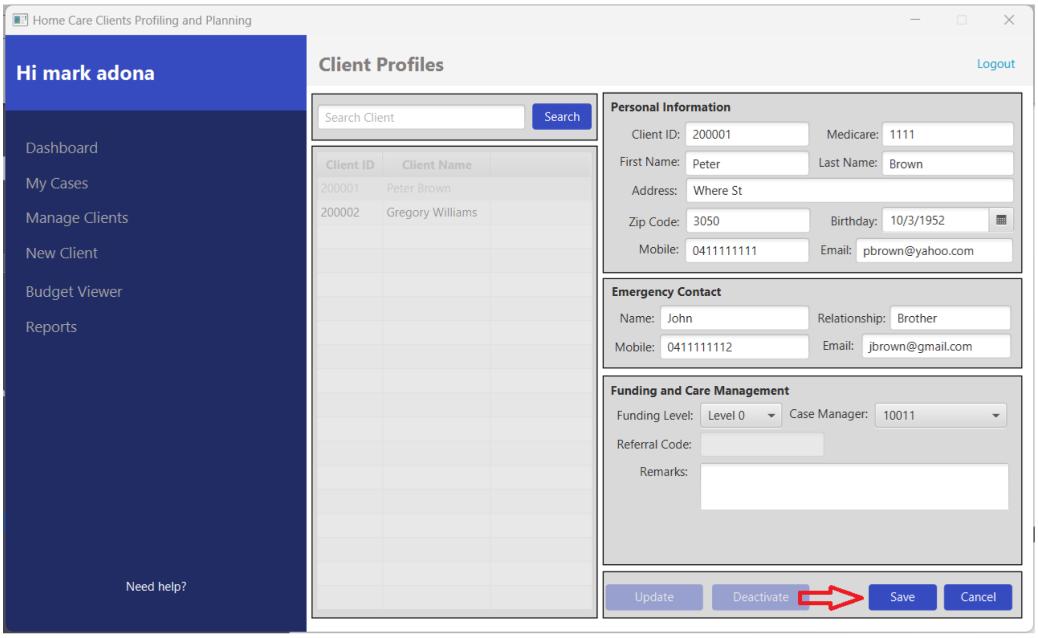
2. To update client information, navigate to the Manage Client by clicking on the left panel menu.



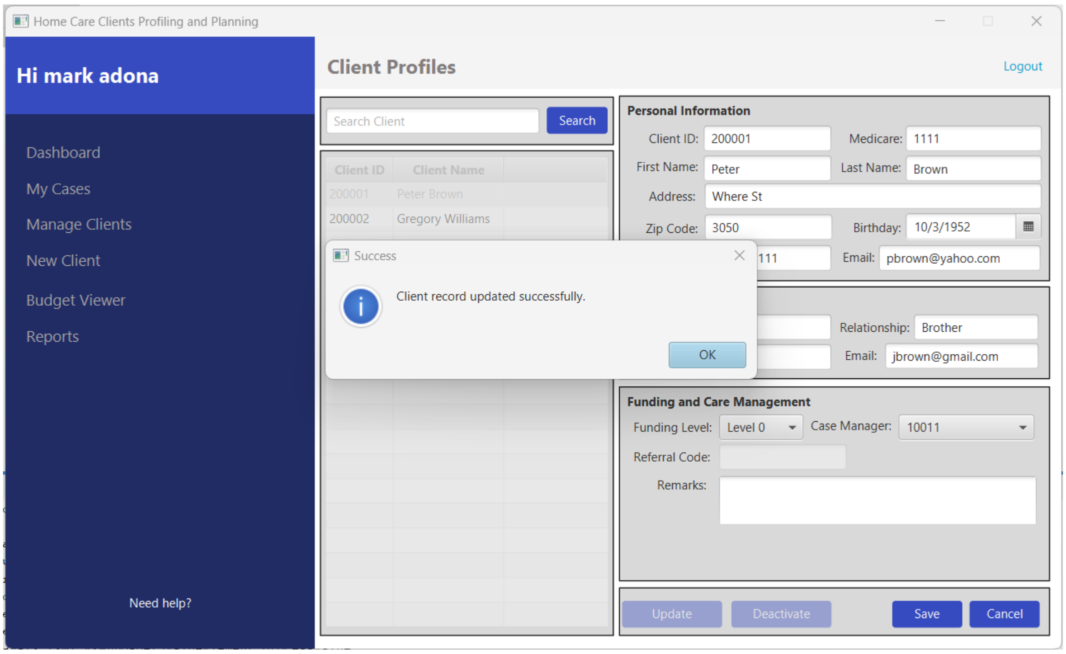
3. Select a client from the table and click on update.



4. Update the details as intended then click on save.

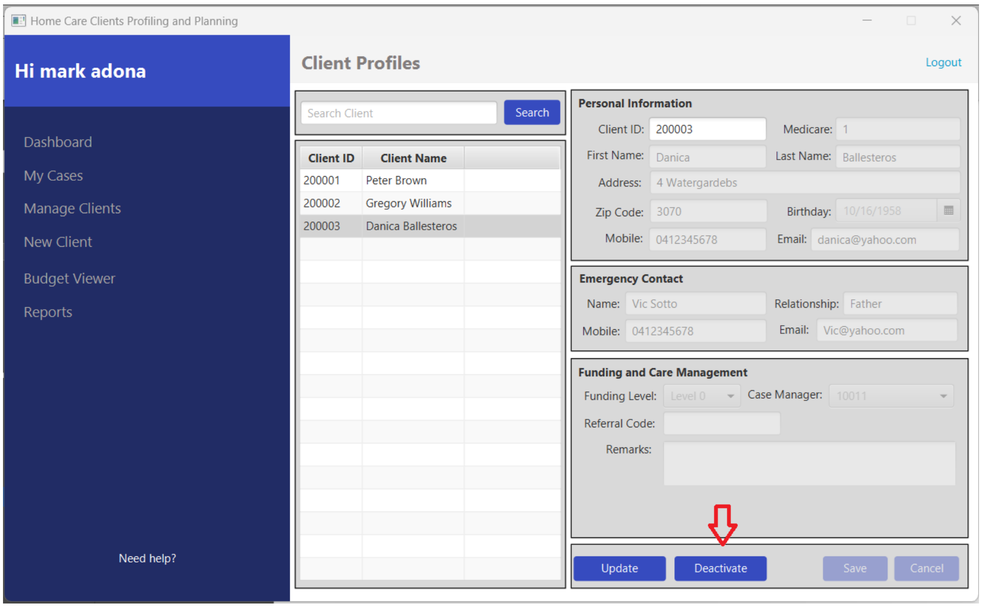


5. Follow the prompts once successful the system will confirm.

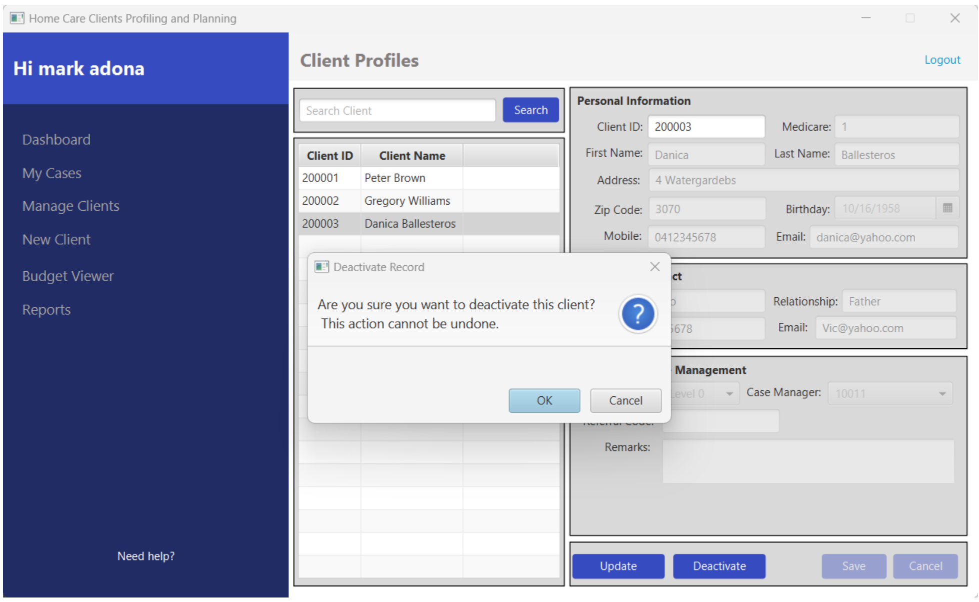


Deactivate a client

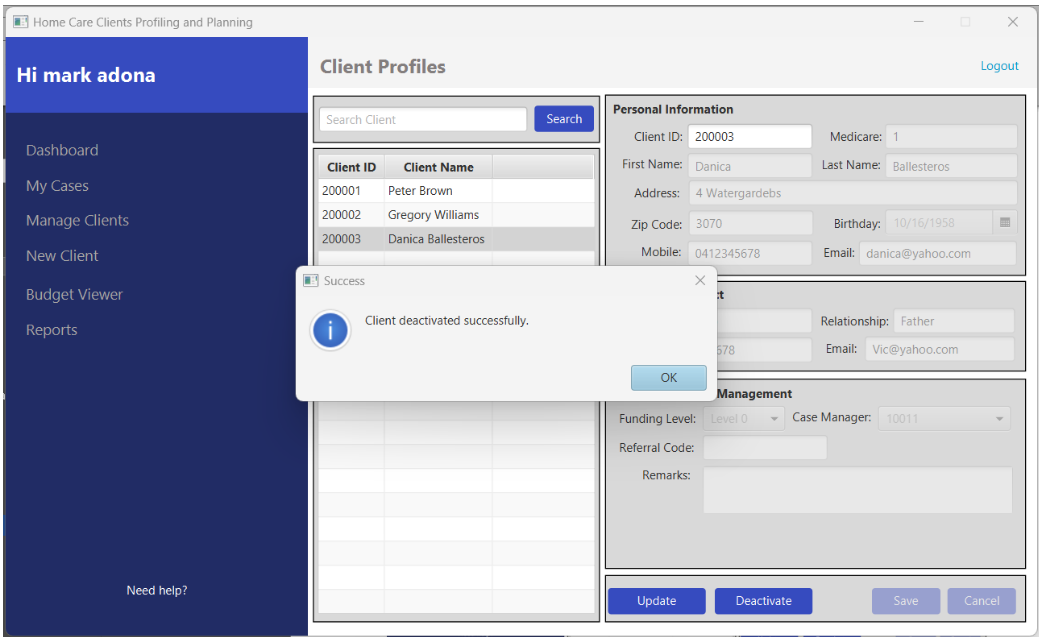
1. To deactivate a user profile, select a client from the table and click on Deactivate.



2. Follow the on-screen prompts to complete the deactivation.

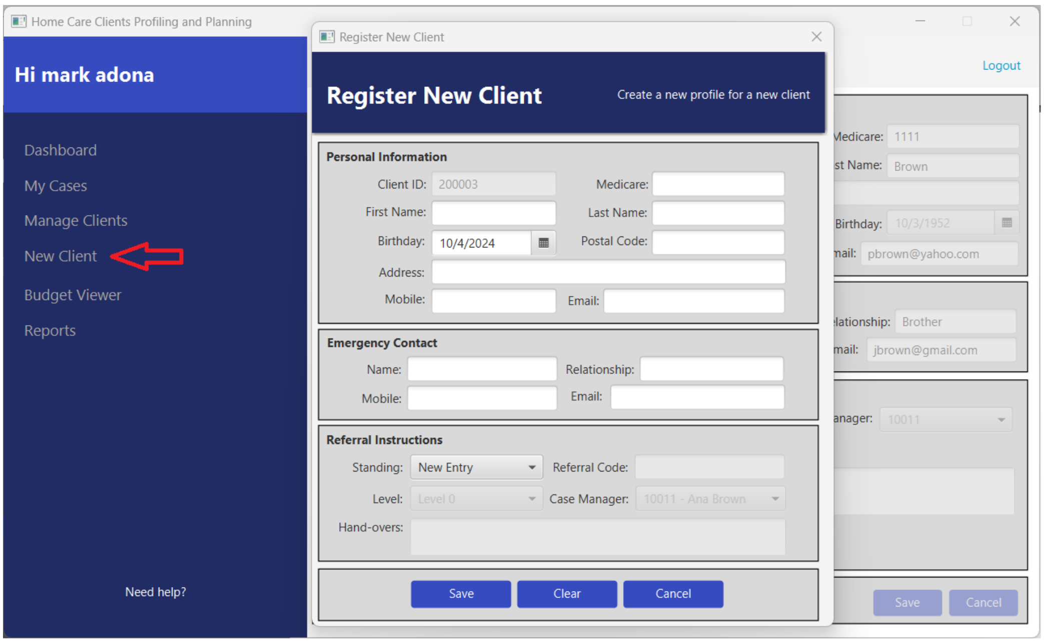


3. A deactivation confirmation will show up.

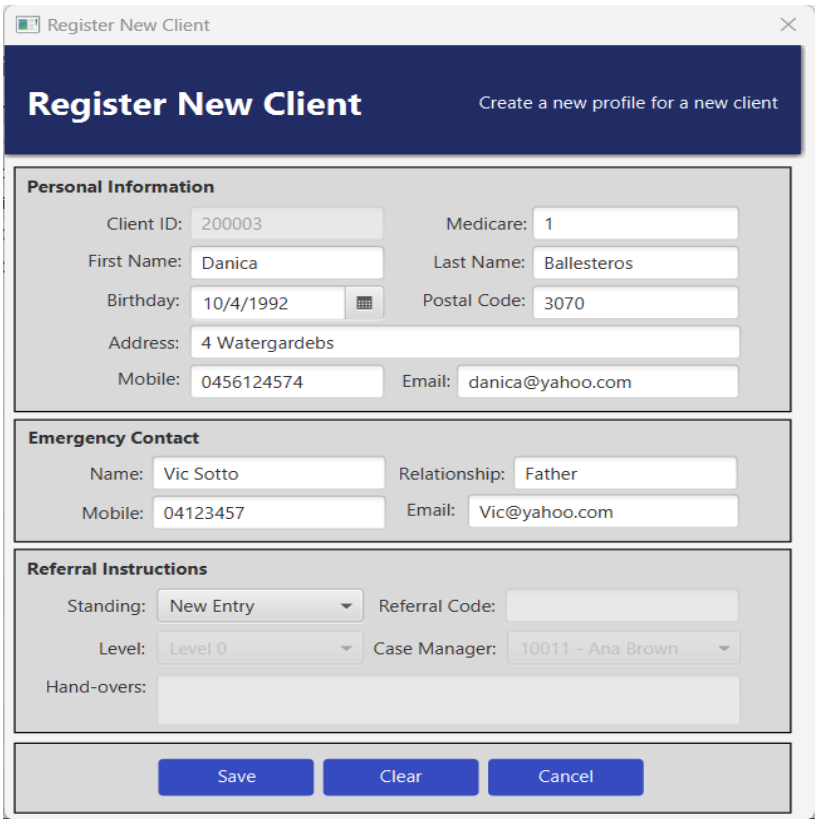


Enrol New Client

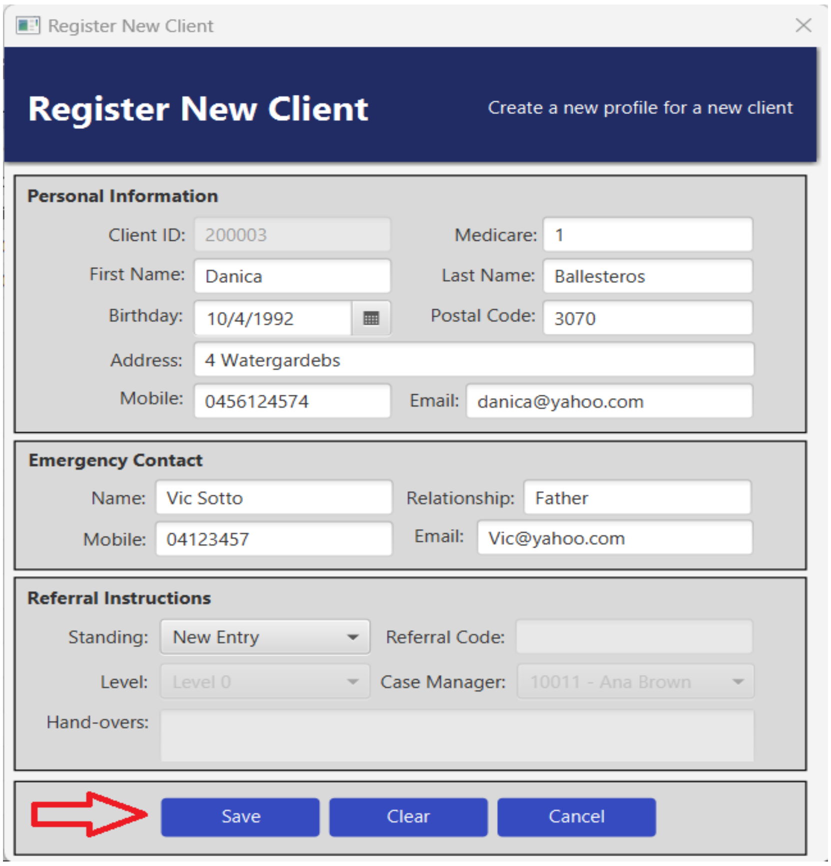
1. To enrol a new client, click on the New Client menu, a new window will open to register a new client.



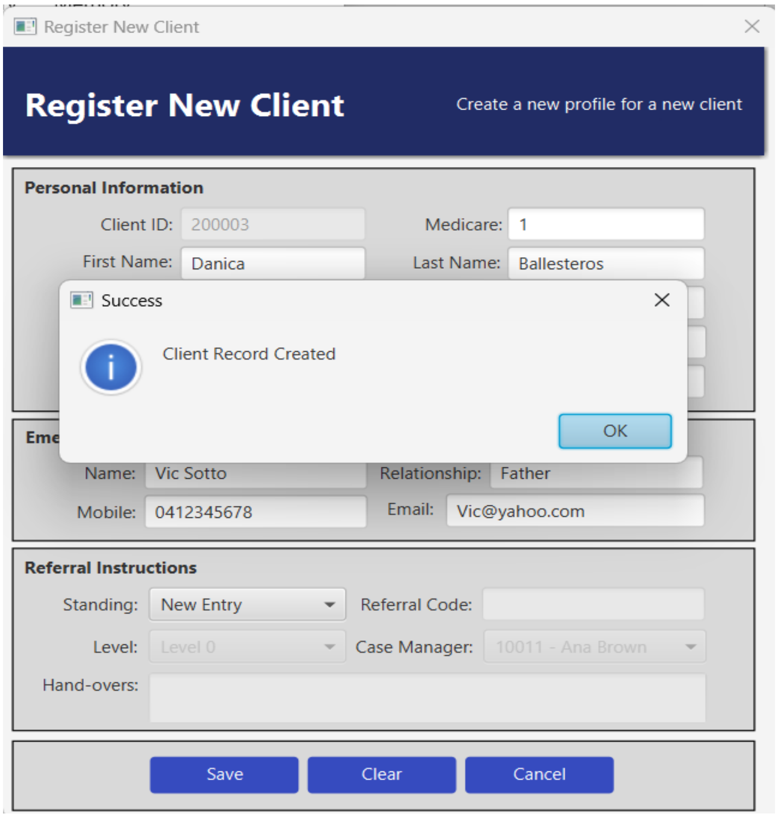
2. Fill in all the required fields and follow on screen validation.



3. Once complete, click on save to confirm changes.

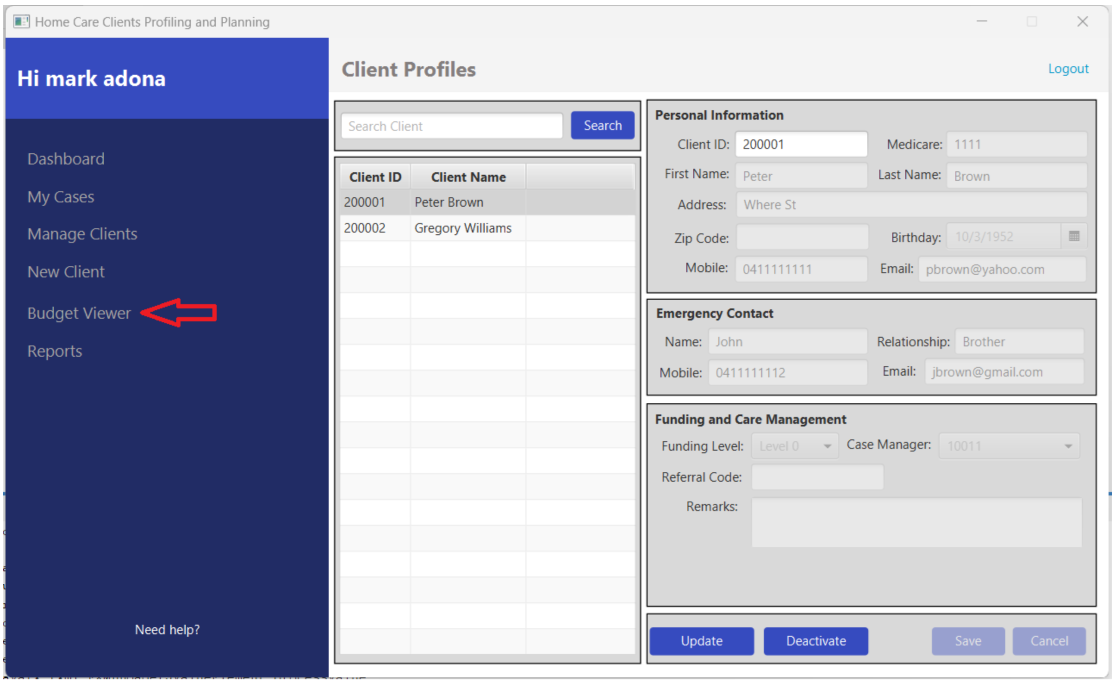


4. A confirmation dialog will pop up.

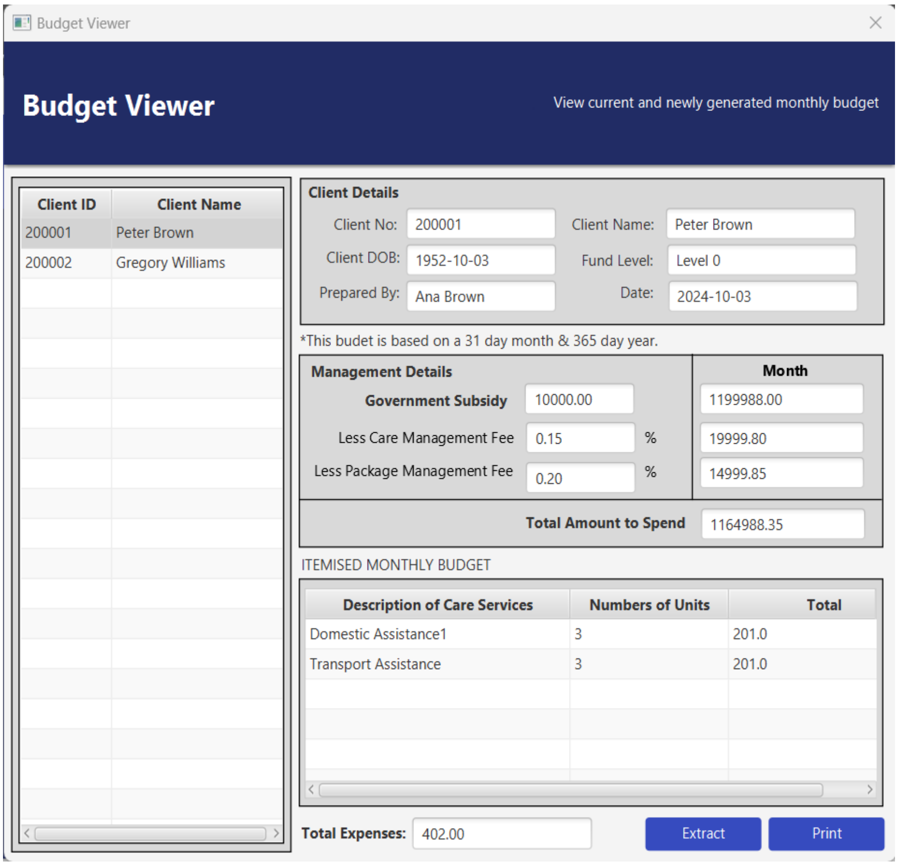


Budget Viewing

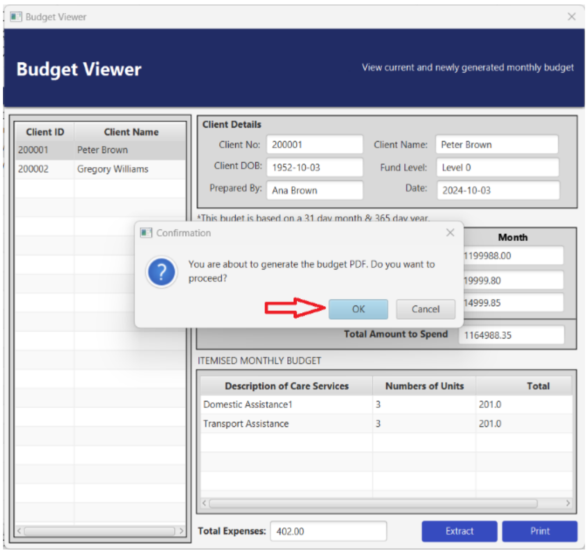
1. To view the client budget, navigate to the Budget Viewing by clicking it on the side menu.

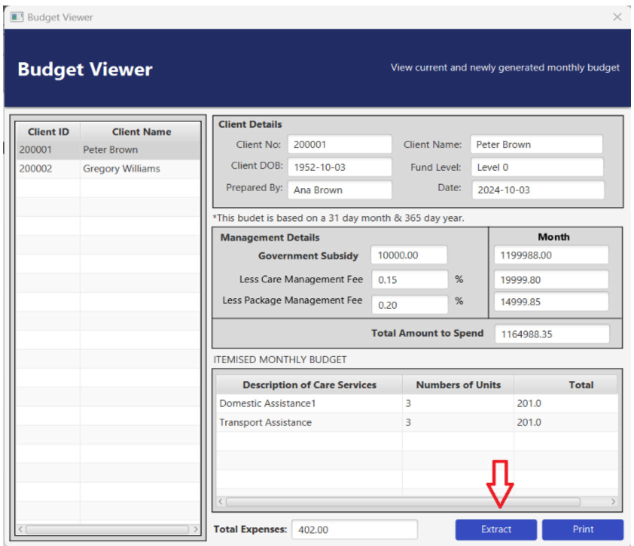


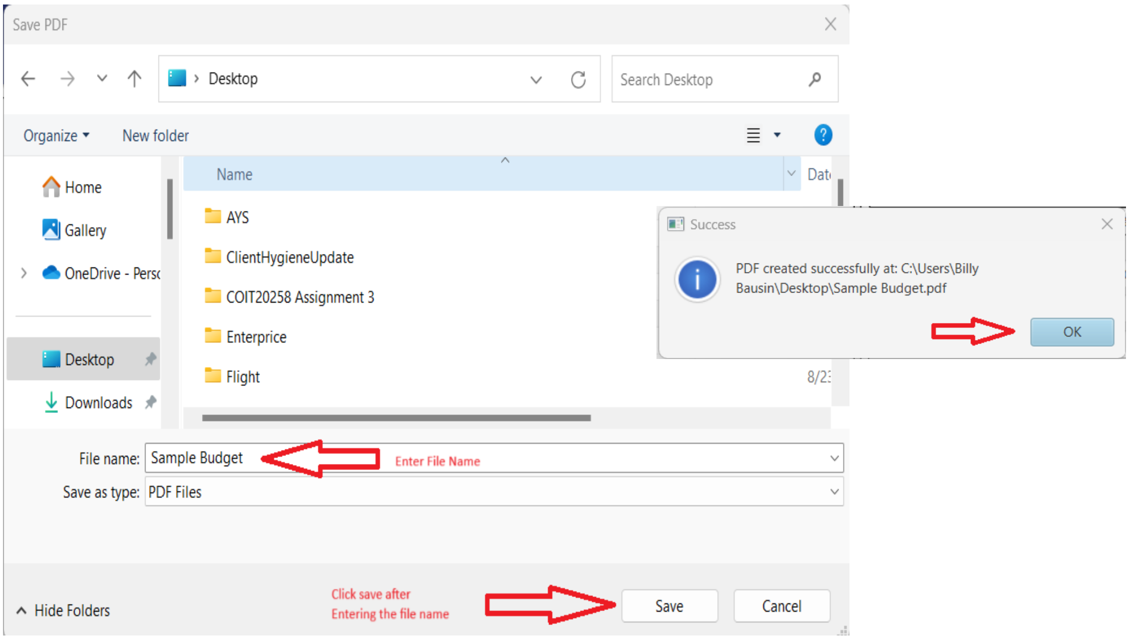
2. This will open a new window. Select a client the view the corresponding budget.

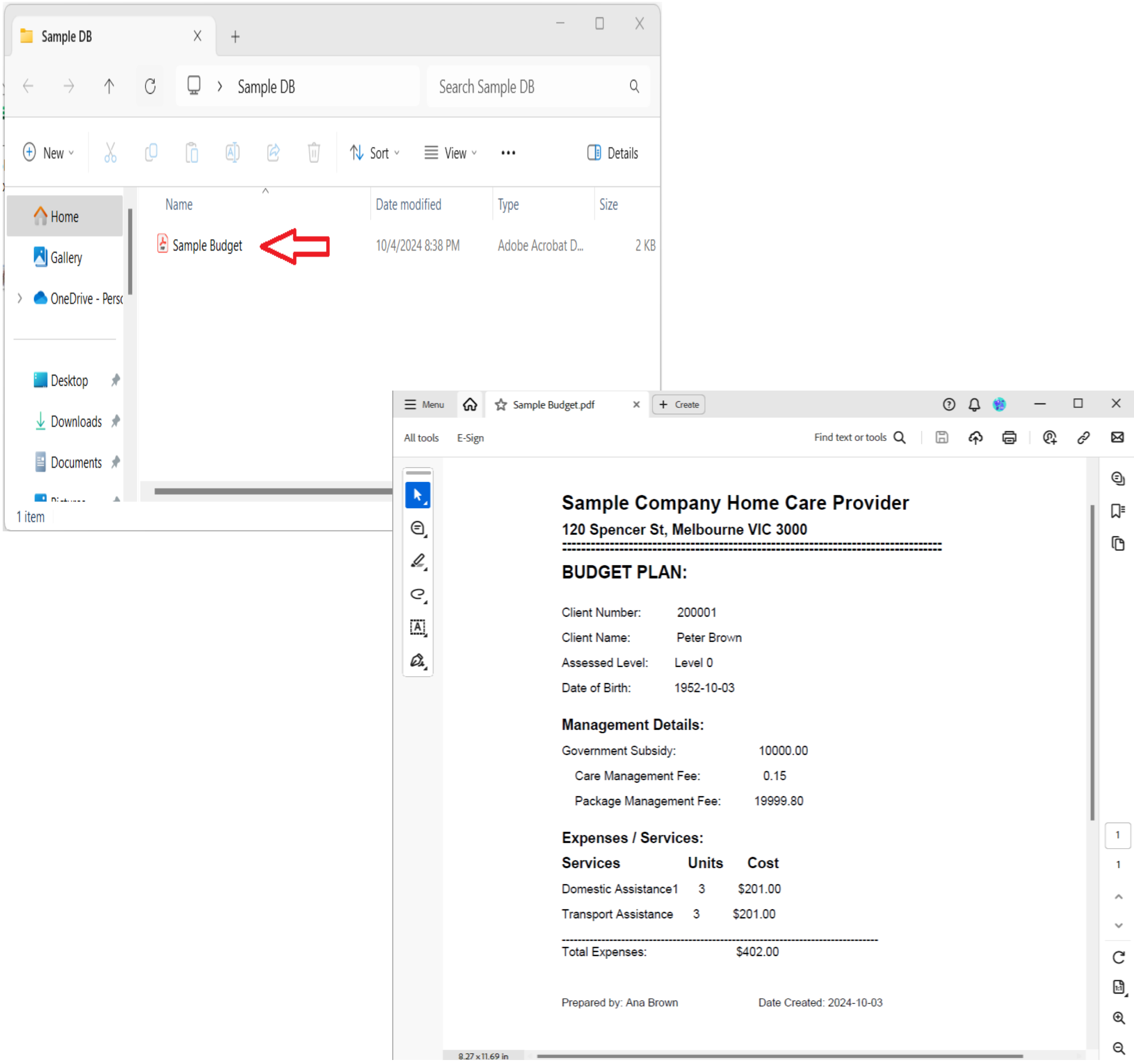


3. To extract the budget to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)






Save PDF
Desktop
Search Desktop
Organize
New folder
Home
Gallery
OneDrive - Perso
Desktop
Downloads
Name
AYS
ClientHygieneUpdate
COIT20258 Assignment 3
Enterprice
Flight
Success
PDF created successfully at: C:\Users\Billy Bausin\Desktop\Sample Budget.pdf
OK
File name:
Sample Budget
Enter File Name
Save as type:
PDF Files
Hide Folders
Click save after Entering the file name
Save
Cancel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Details
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Downloads
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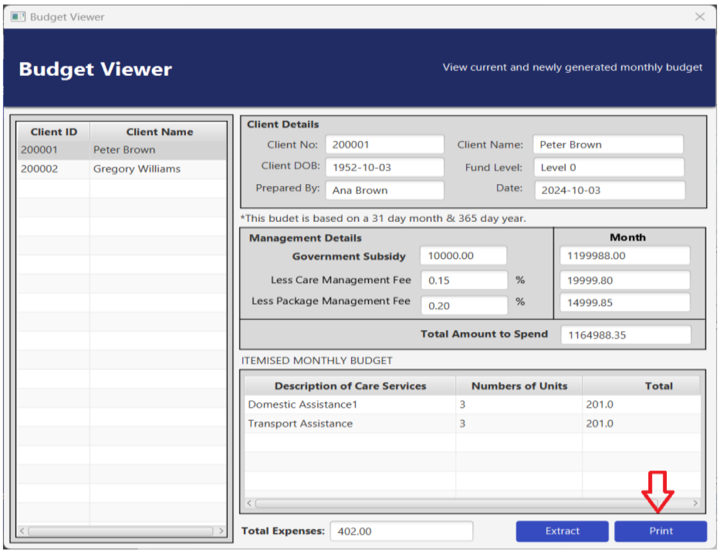
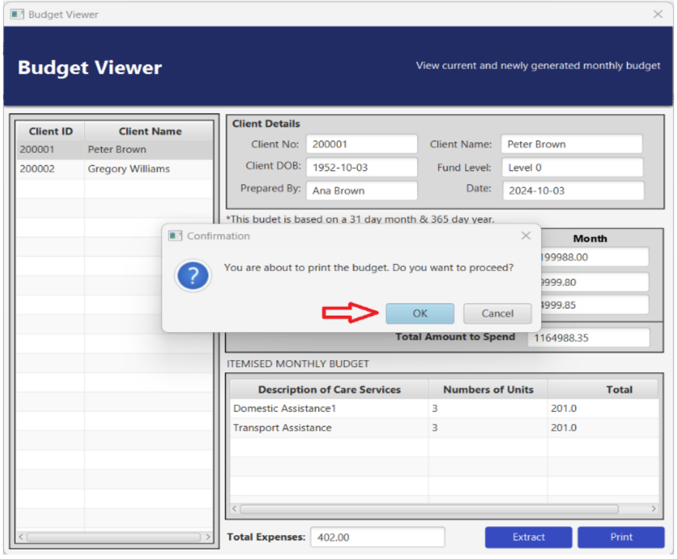
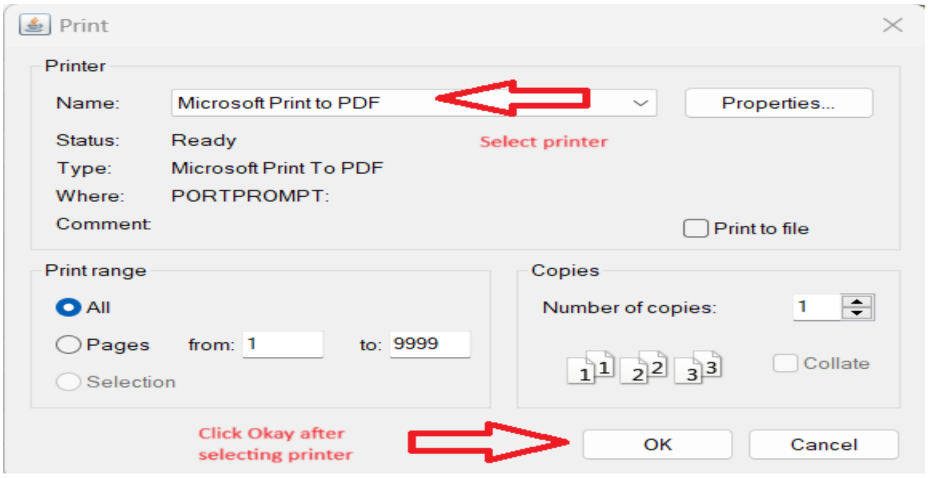
Adobe Acrobat D...
2 KB
1 item
Menu
Sample Budget.pdf
Create
All tools
E-Sign
Find text or tools
Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000
BUDGET PLAN:
Client Number: 200001
Client Name: Peter Brown
Assessed Level: Level 0
Date of Birth: 1952-10-03
Management Details:
Government 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

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

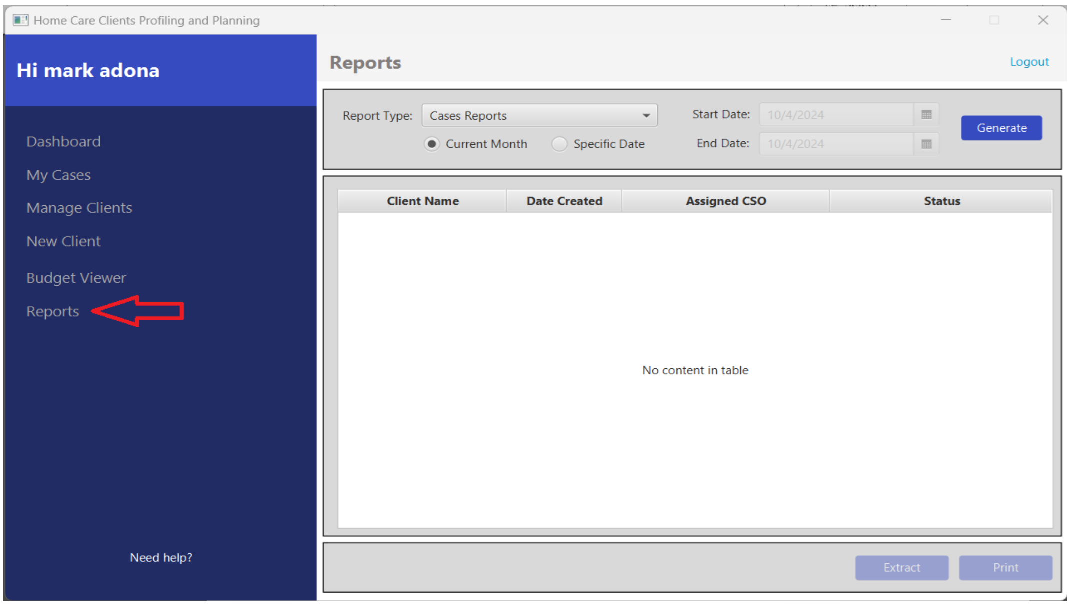




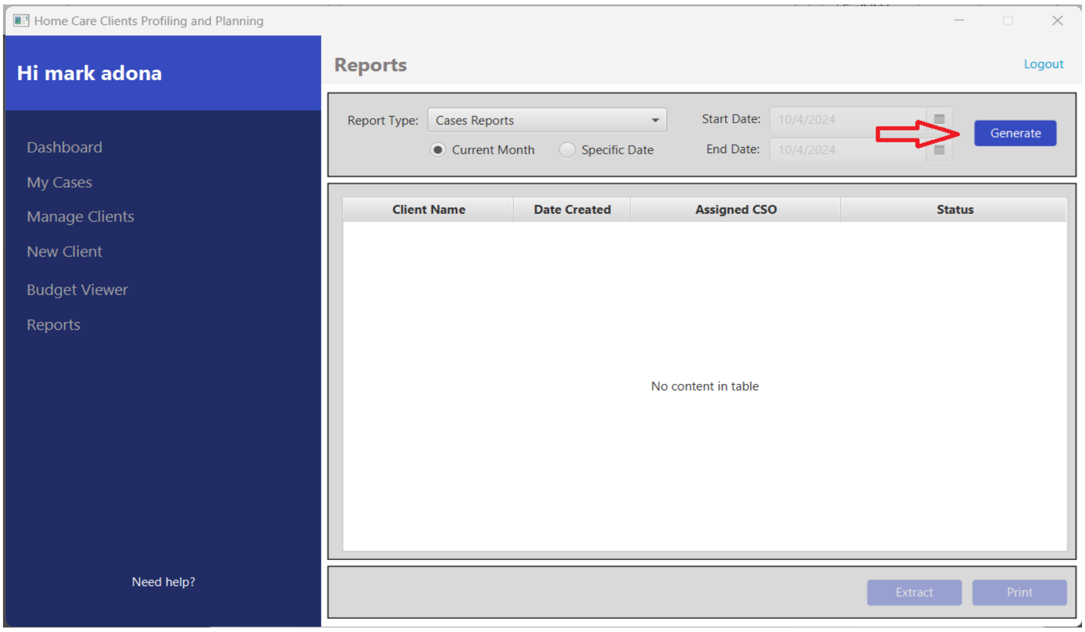


Reports Generation

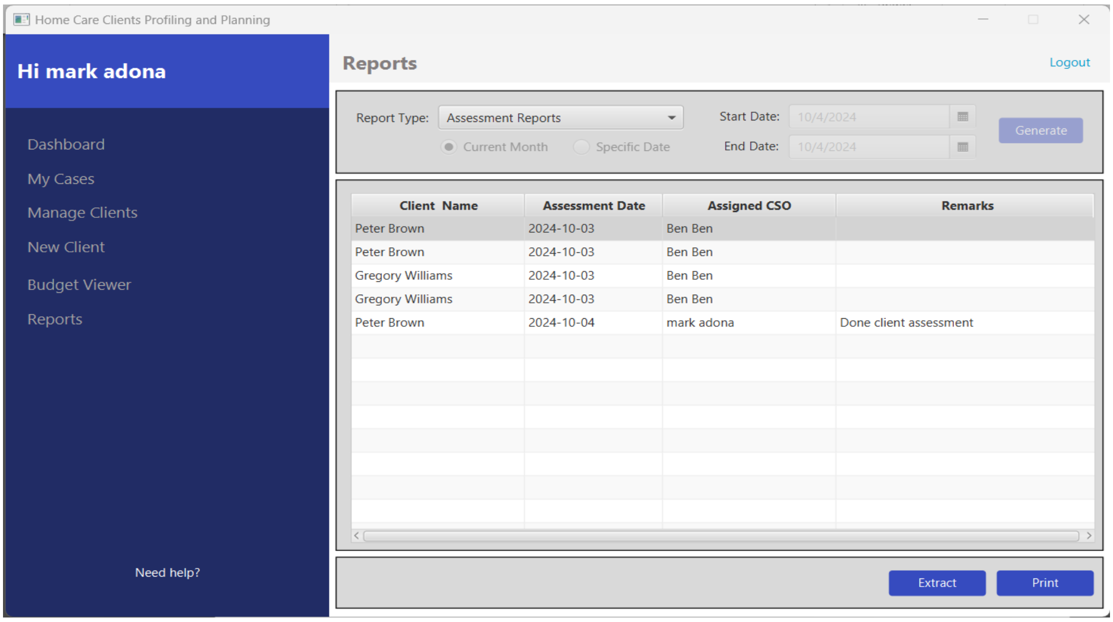
1. To generate a report, click on the Reports on the left side panel menu.



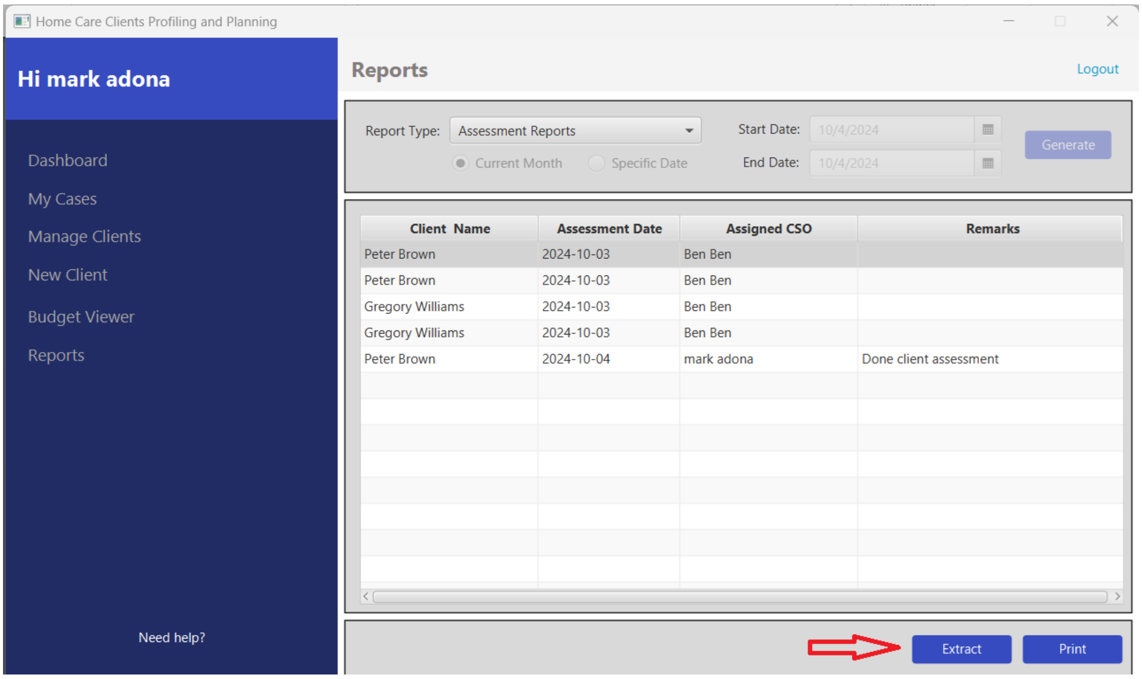
2. Select which type of report that is intended to generate then click on generate.

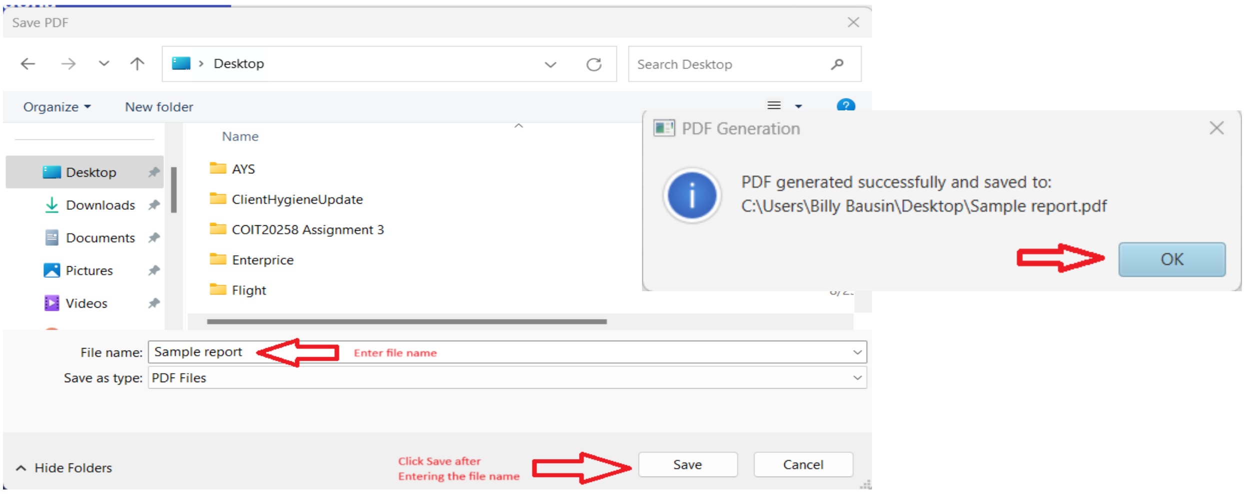


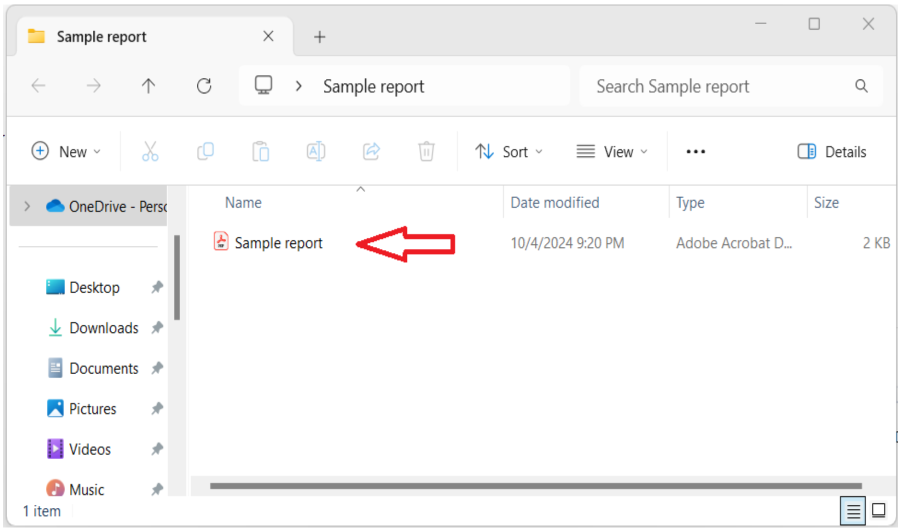
3. Options for custom reports is also available depending on the report type.



4. 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)




Save PDF
Desktop
Search Desktop
Organize
New folder
Name
Desktop
Downloads
Documents
Pictures
Videos
AYS
ClientHygieneUpdate
COIT20258 Assignment 3
Enterprice
Flight
PDF Generation
PDF generated successfully and saved to:
C:\Users\Billy Bausin\Desktop\Sample report.pdf
OK
File name:
Sample report
Enter file name
Save as type:
PDF Files
Hide Folders
Click Save after
Entering the file name
Save
Cancel


Sample report
Sample report
Search Sample report
New
Sort
View
Details
OneDrive - Pers
Desktop
Downloads
Documents
Pictures
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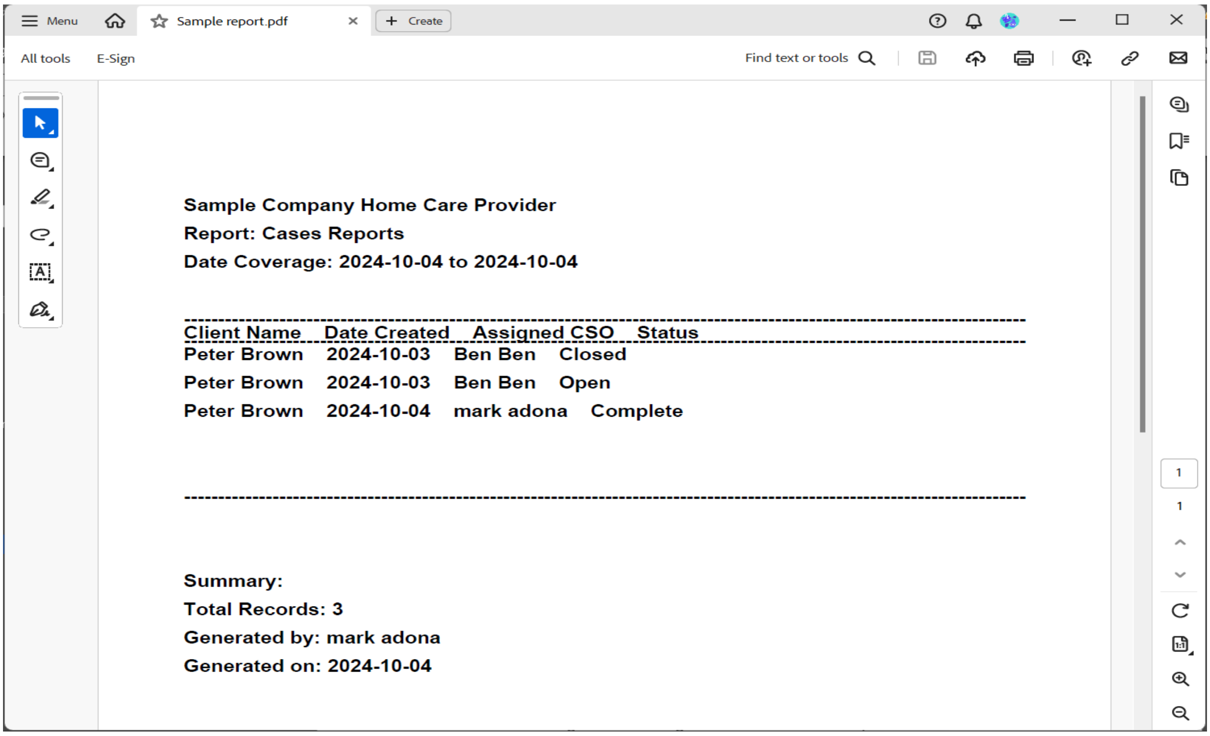
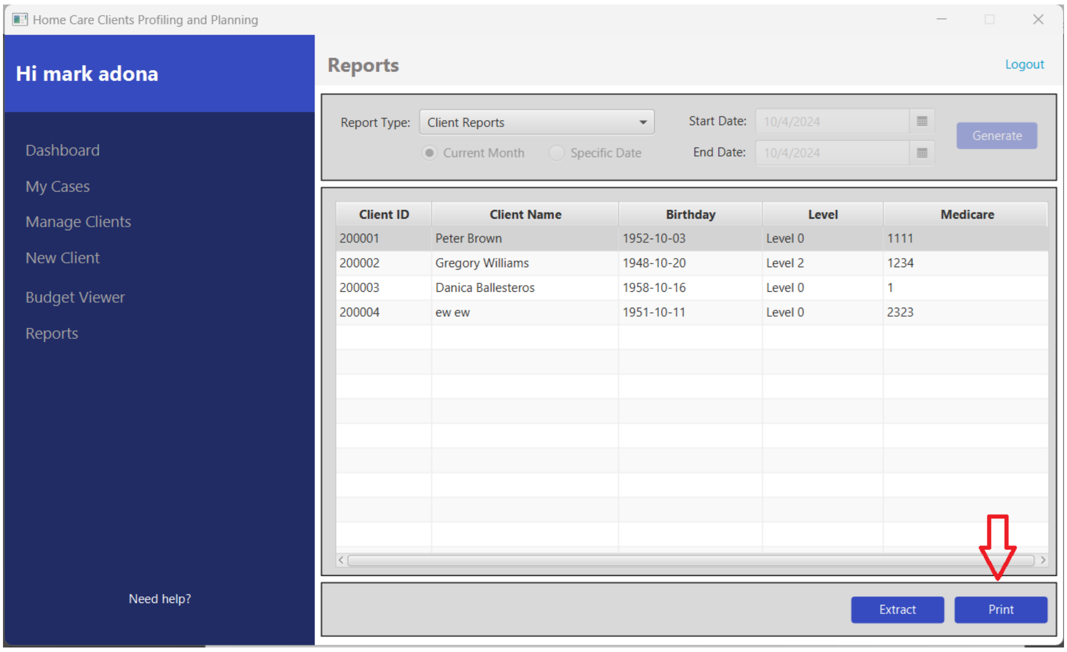
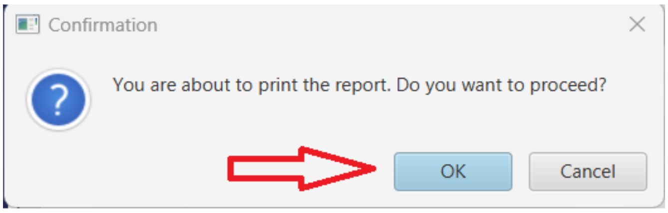
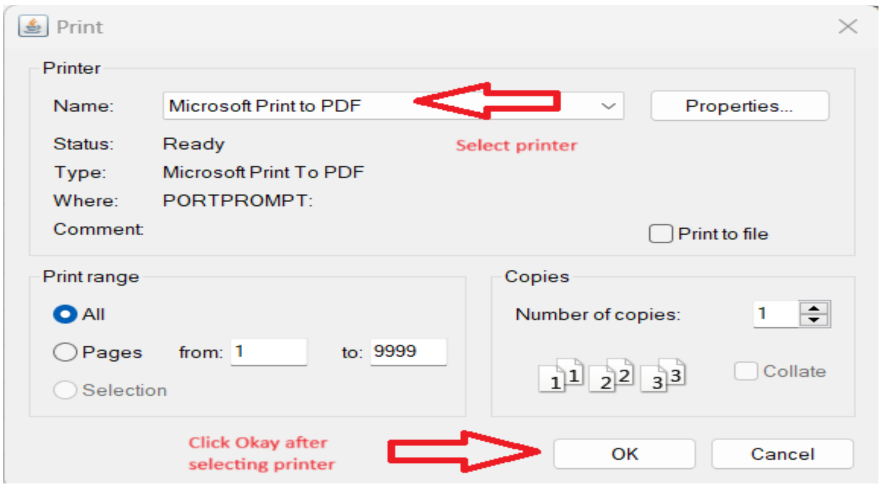
Name
Date modified
Type
Size
Sample report
10/4/2024 9:20 PM
Adobe Acrobat D...
2 KB
1 item


Menu
Sample report.pdf
Create
All tools
E-Sign
Find text or tools
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

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



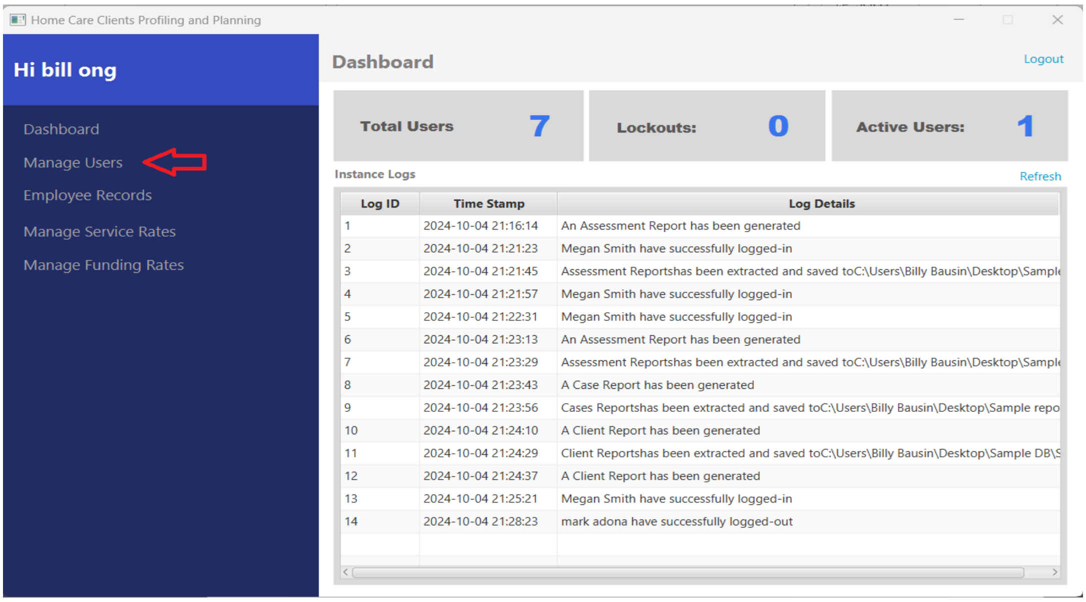




5.3 System Administrator

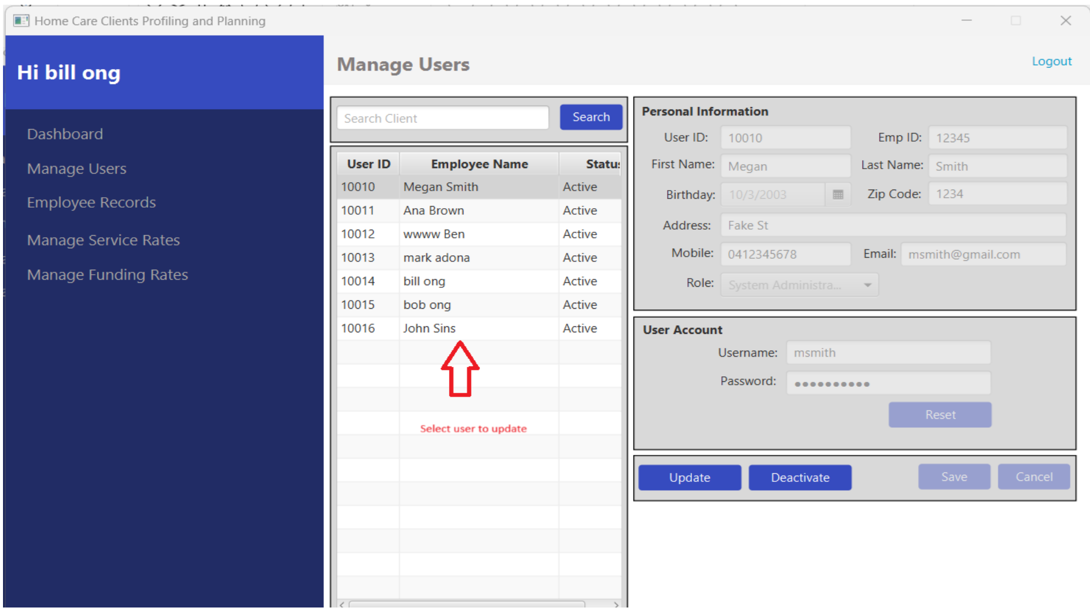
User Management

1. Navigate to Manage Users from the left panel menu.

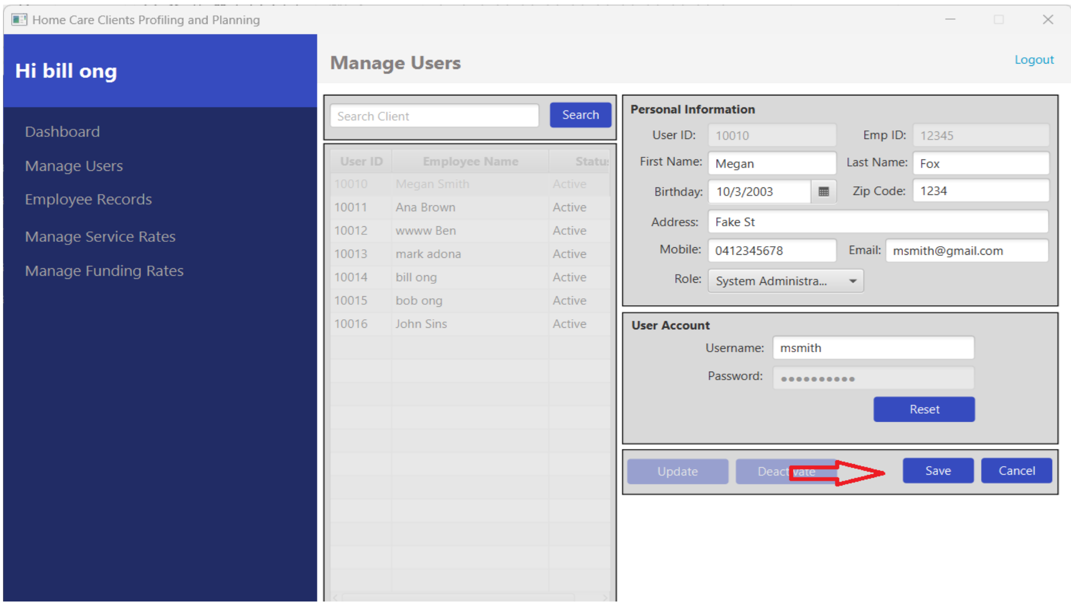


Update User Data

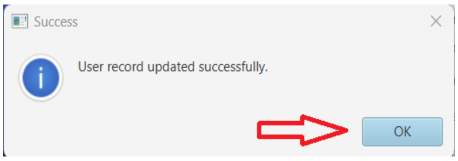
2. Select from the user list the profile that you wish to update then click the Update Button. This will allow managing the client details.



3. Click on save to confirm changes

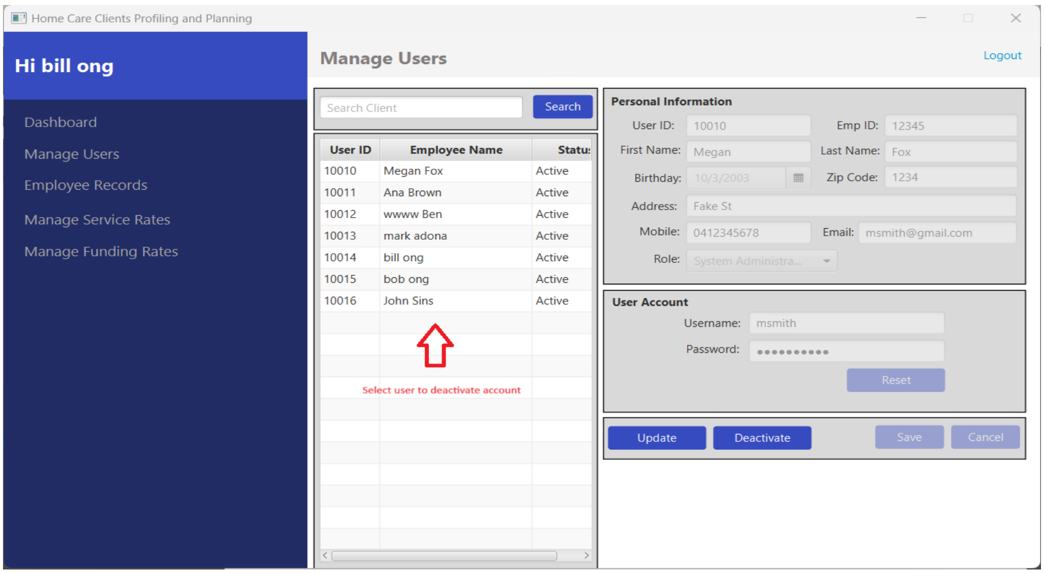


4. A confirmation pop will show.

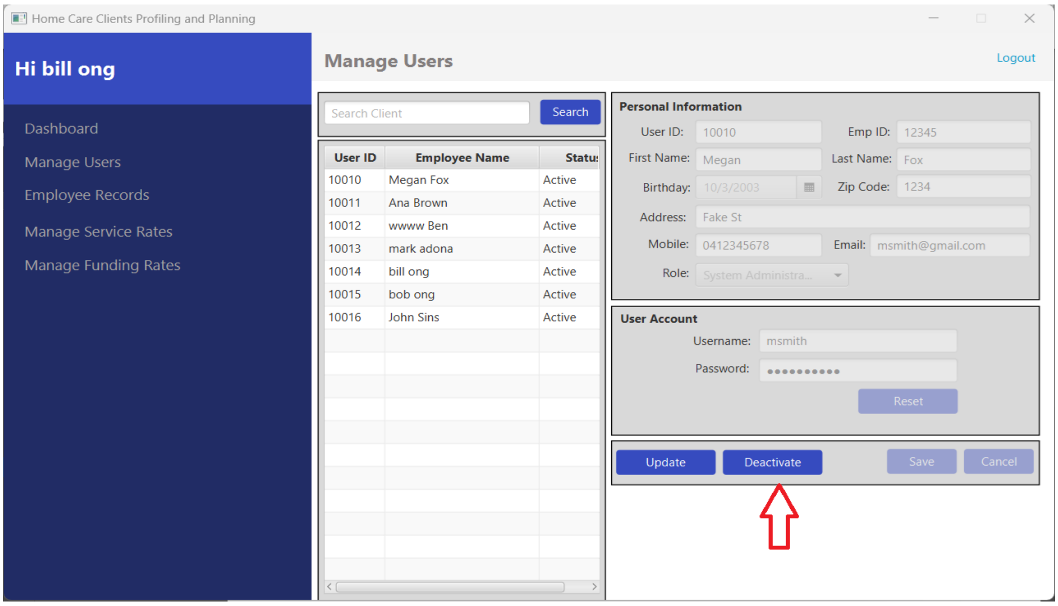


Deactivate a User

1. To deactivate an account, select from the user list the profile that you wish to deactivate.

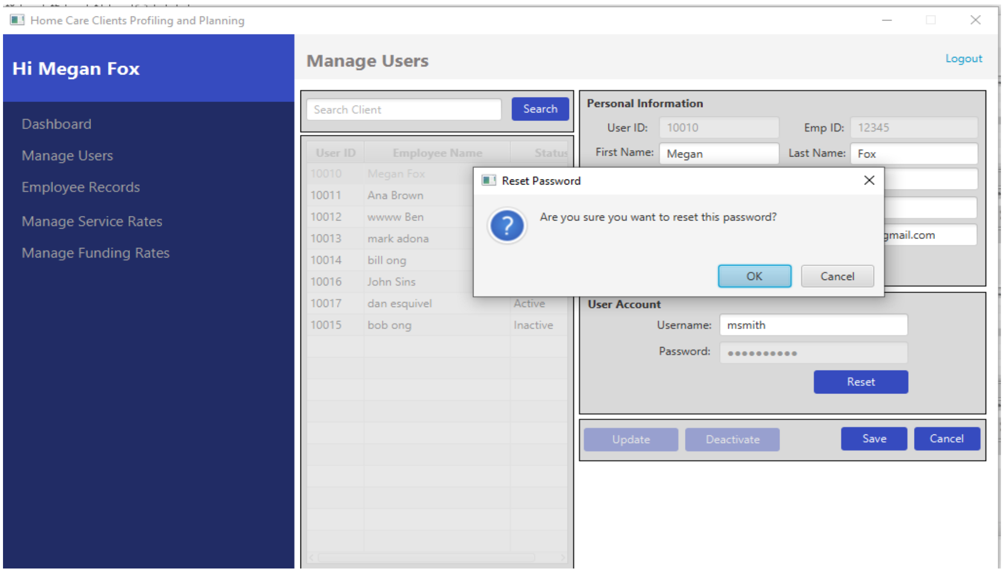


2. Then click the Deactivate Button. Follow the on-screen instruction to confirm deactivation.

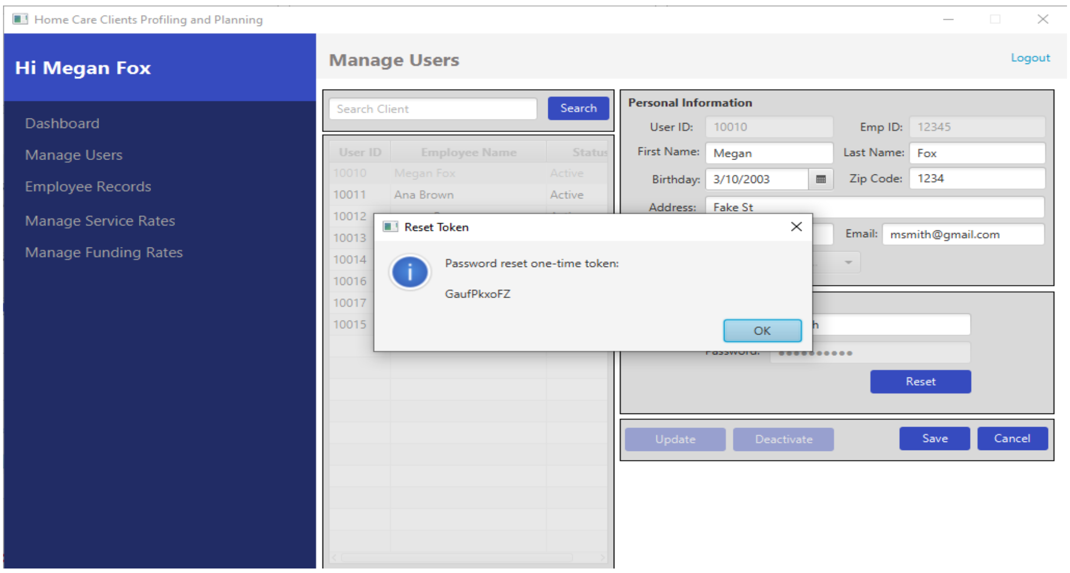


Password Reset

1. To reset the password, select from the user list the profile then click on Update button then click Reset Button.

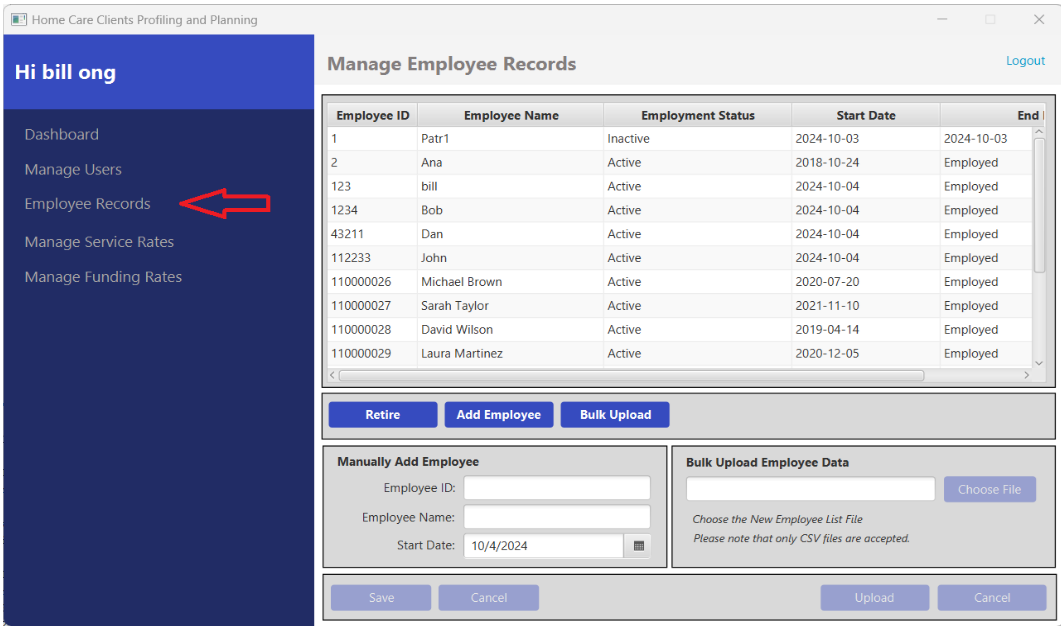


2. This will generate a onetime key which will be used by the user to change their password.

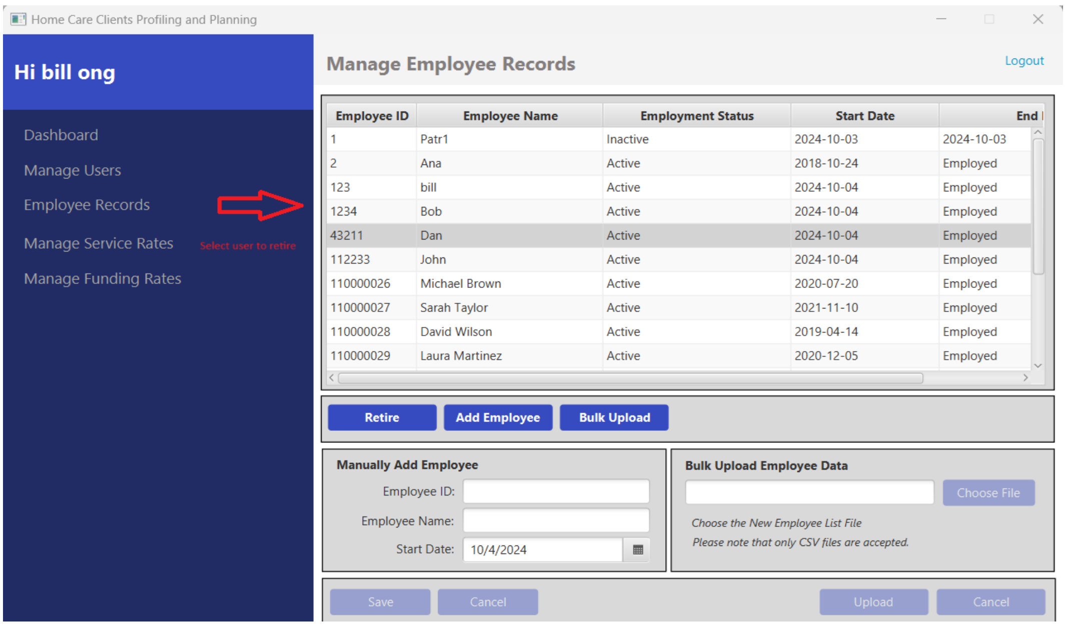


Employee Management

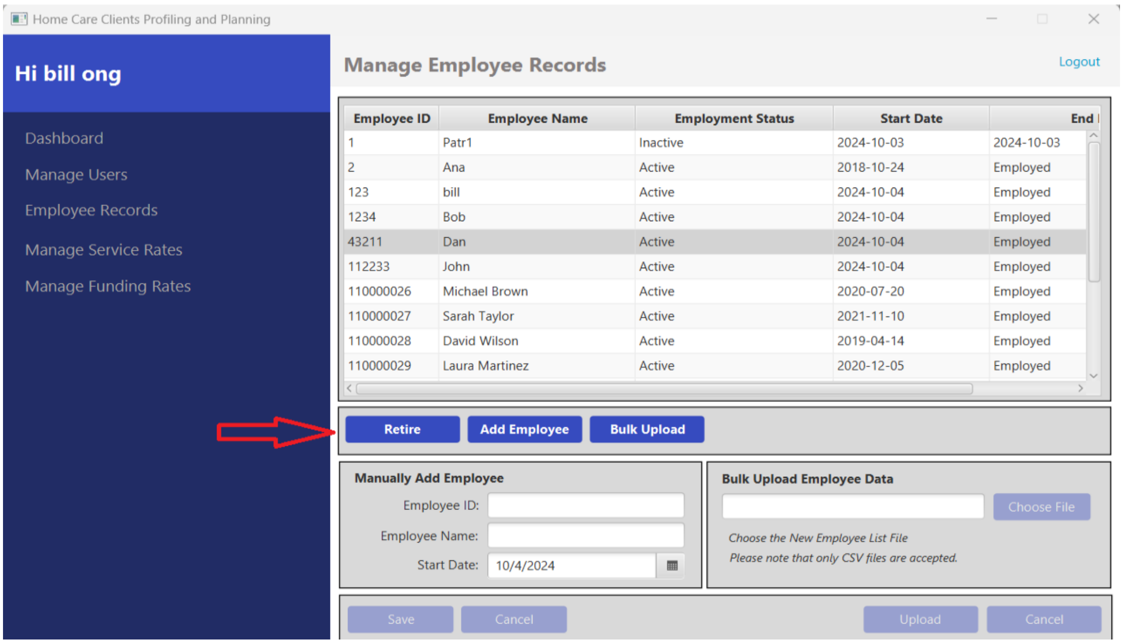
1. To retire an employee on record, click on the Employee Record on the left panel menu.

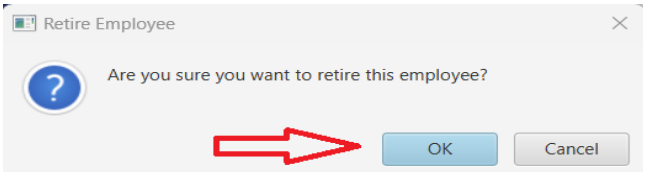


2. Select an employee from the list that you wish to deactivate.



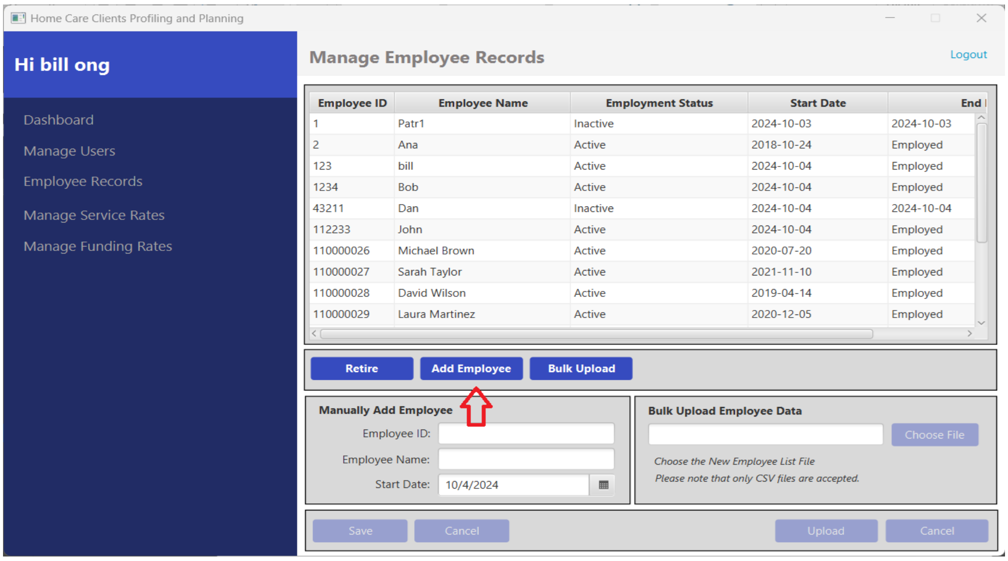
3. Click on retire then follow the on-screen instructions



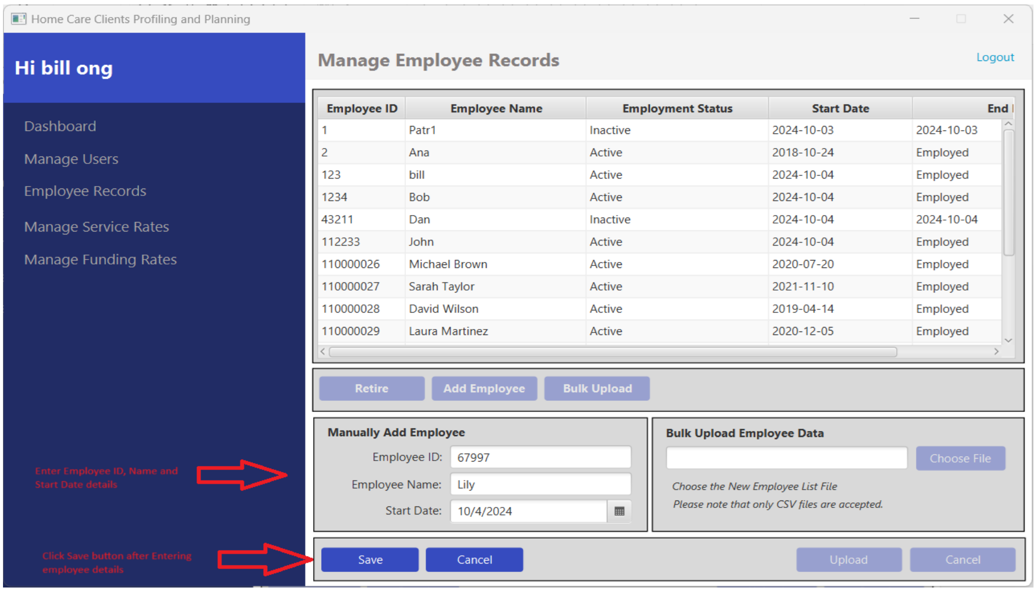


Manual Adding of Employee

1. To manually add an employee on record, click on Add Employee.

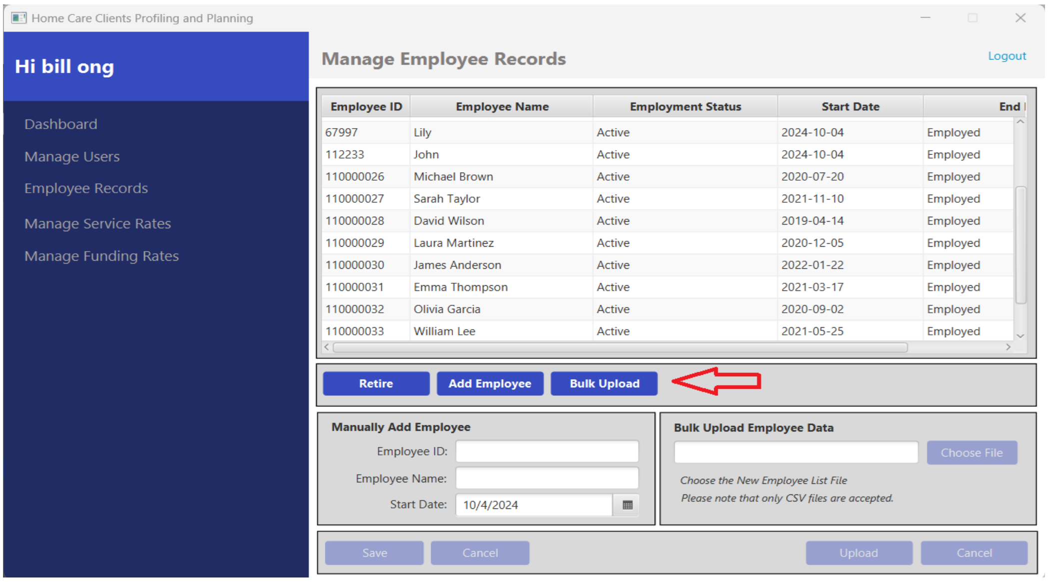


2. This will allow input of single employee on the record. click on Save to confirm record enrolment.

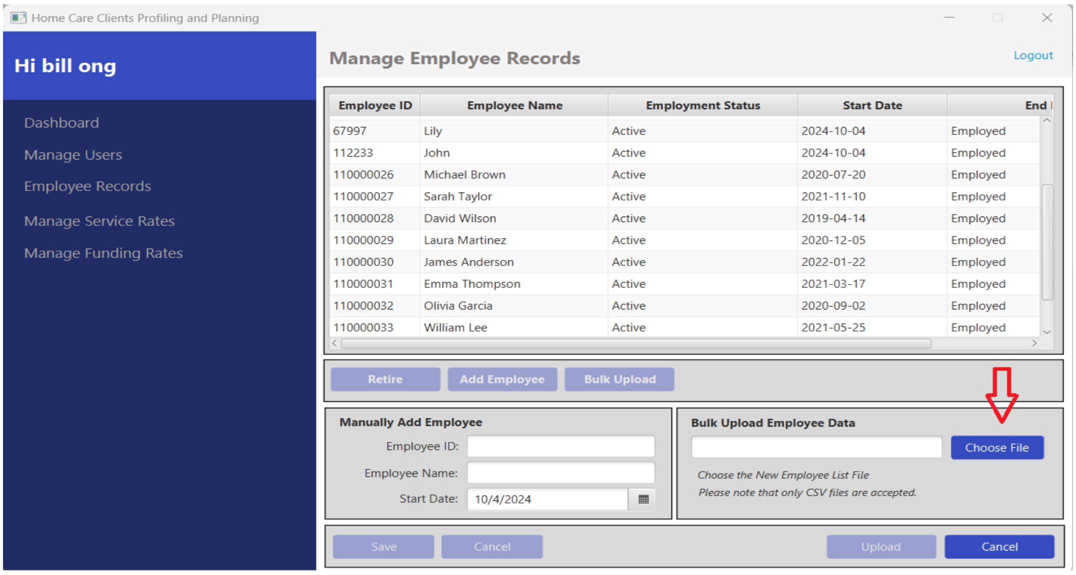


Bulk Adding of Employee

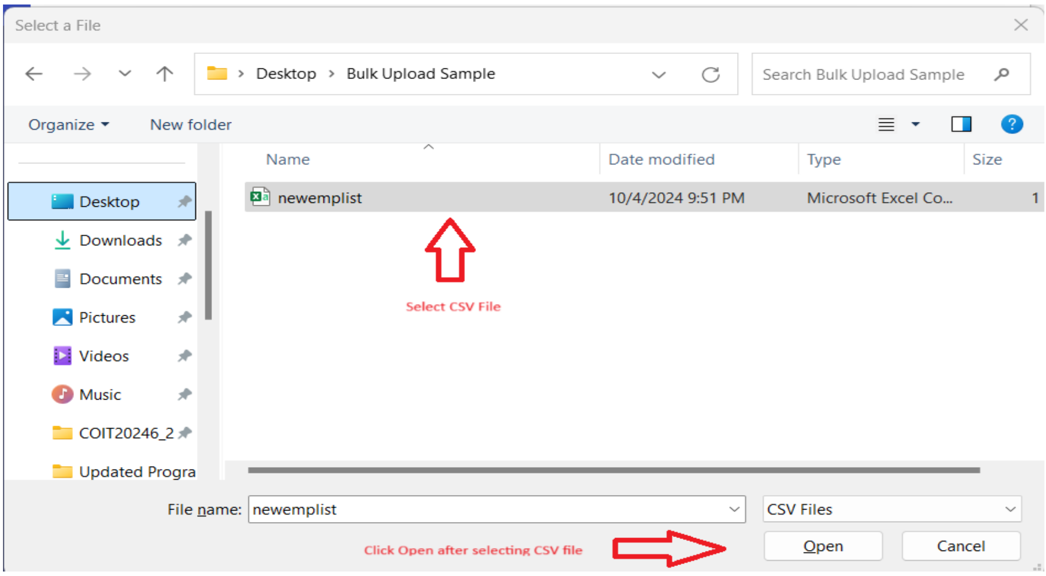
1. To import an alphalist, click on the Bulk Upload Button, this will allow uploading of a CSV file that contains employee record.



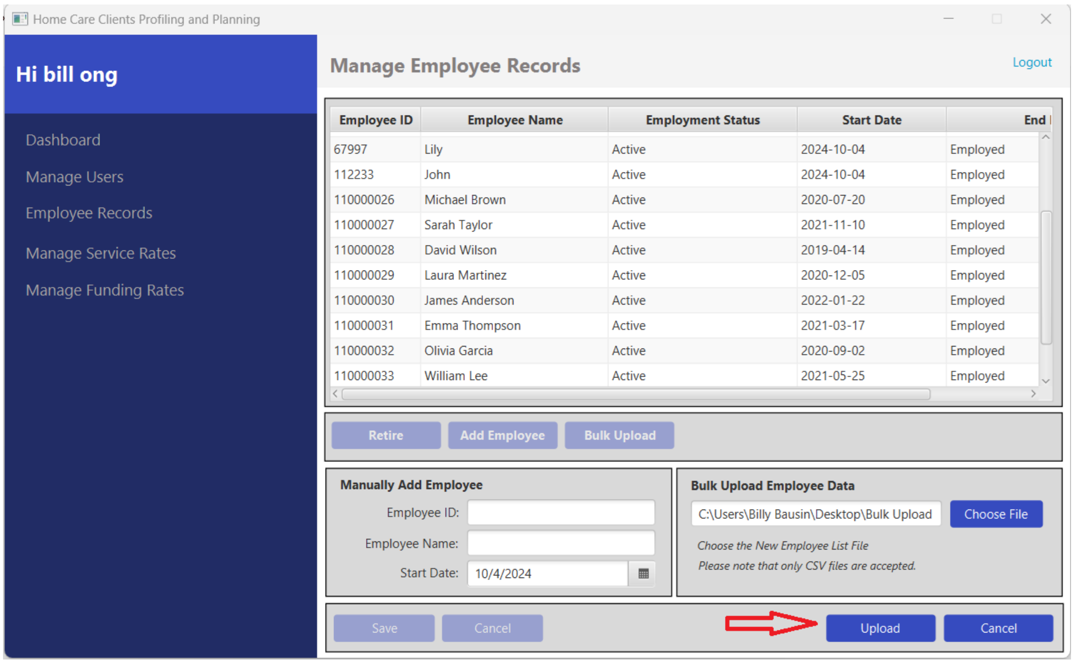
2. Click on choose file to choose a file to upload



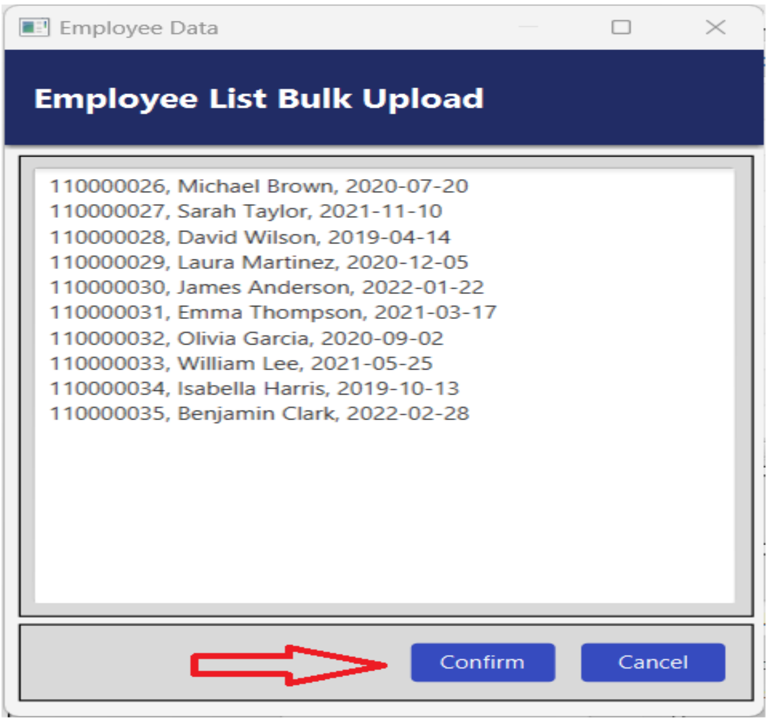
3. Choose the file from the windows explorer.



4. Then click on Upload.

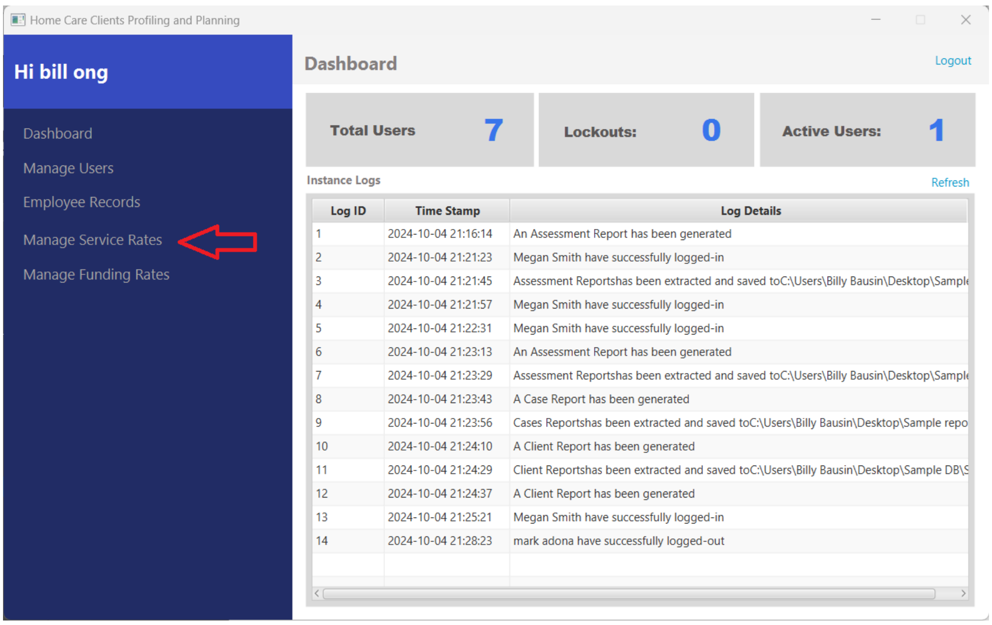


5. This will open a new window showing the content of the file. Click on confirm to continue processing bulk upload,

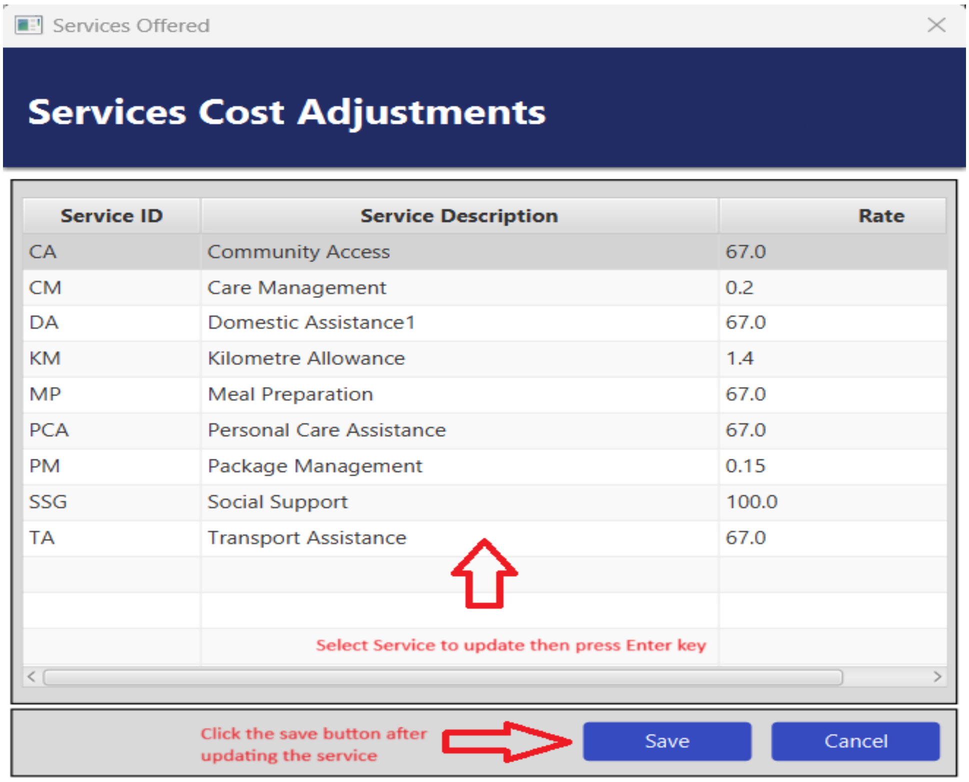


Manage Service Rates

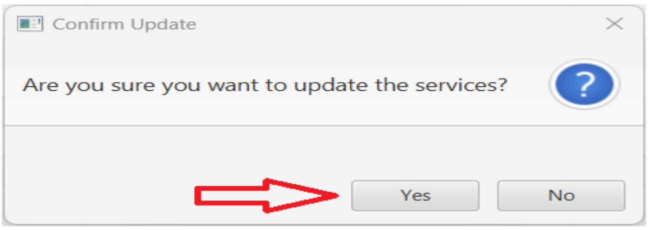
1. To update the Service Rates, click on the side panel menu.

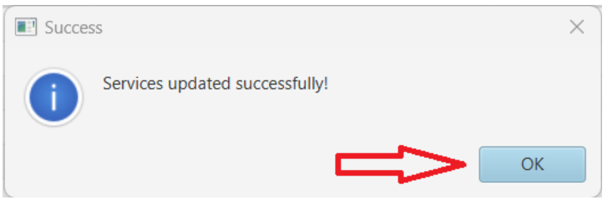


2. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update. Then follow the on-screen instructions.



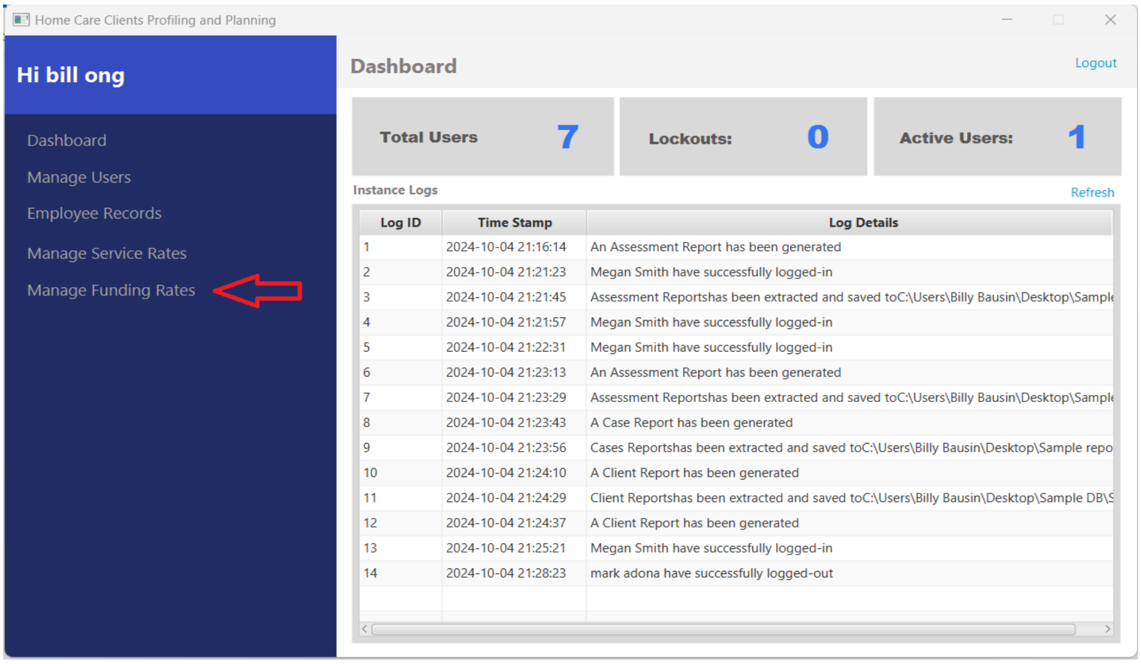
Service ID	Service Description	Rate
CA	Community Access	67.0
CM	Care Management	0.2
DA	Domestic Assistance1	67.0
KM	Kilometre Allowance	1.4
MP	Meal Preparation	67.0
PCA	Personal Care Assistance	67.0
PM	Package Management	0.15
SSG	Social Support	100.0
TA	Transport Assistance	67.0



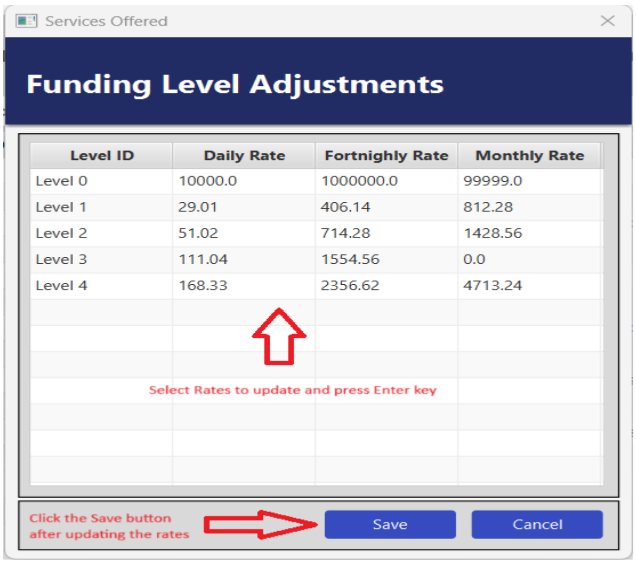


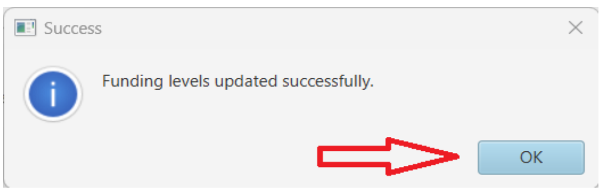
Manage Funding Rates

1. To update the Funding Rates, click on the side panel menu.



2. 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. Then follow the on-screen instructions.





6. 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.

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7. Troubleshooting

7.1 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.