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.

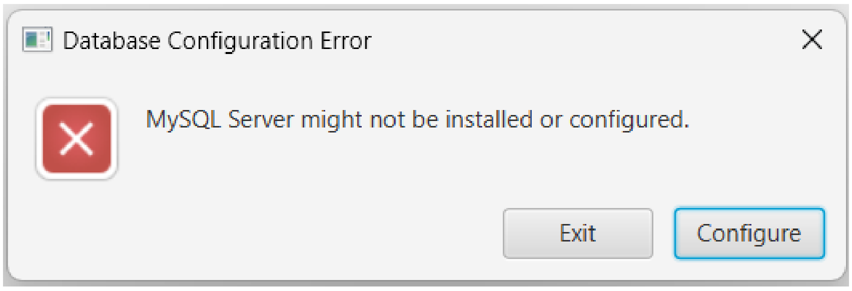
2. System Requirements

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

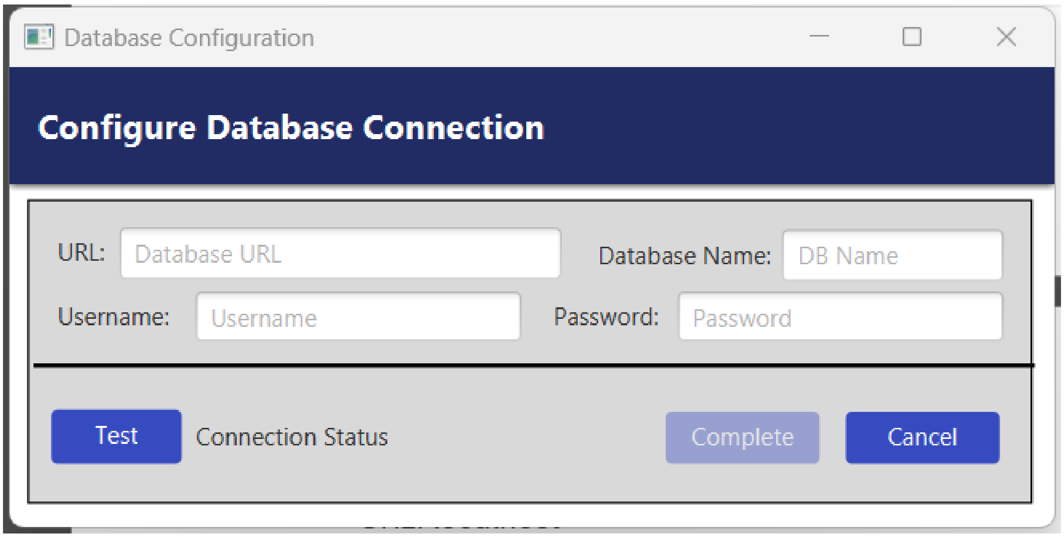
1. Open the software (HomeCare.exe /)
2. Wait until the components are fully established.
3. Once the initialisation is complete provide the database configuration details (only on first run). These are MySQL details which should be available upon successful installation of the same.



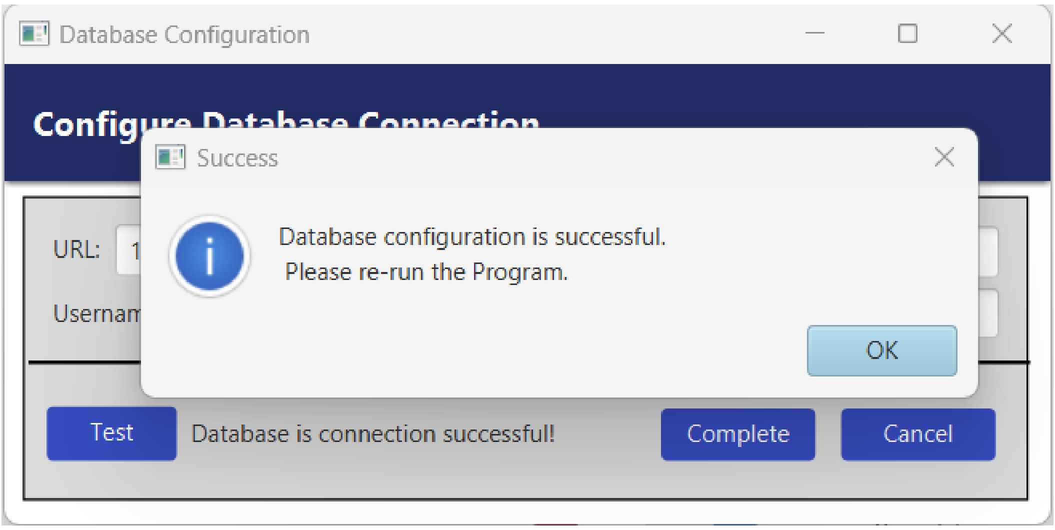
Default Settings

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.



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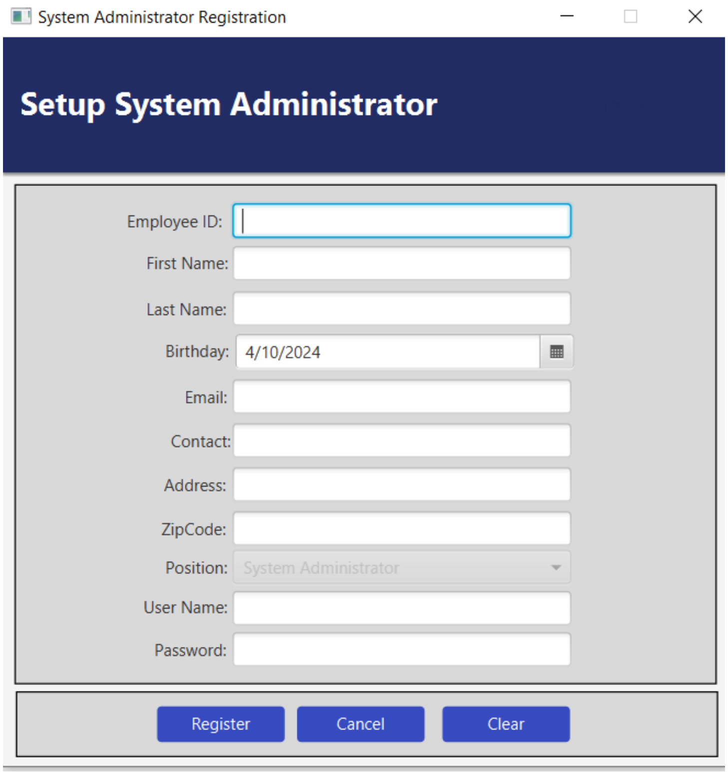
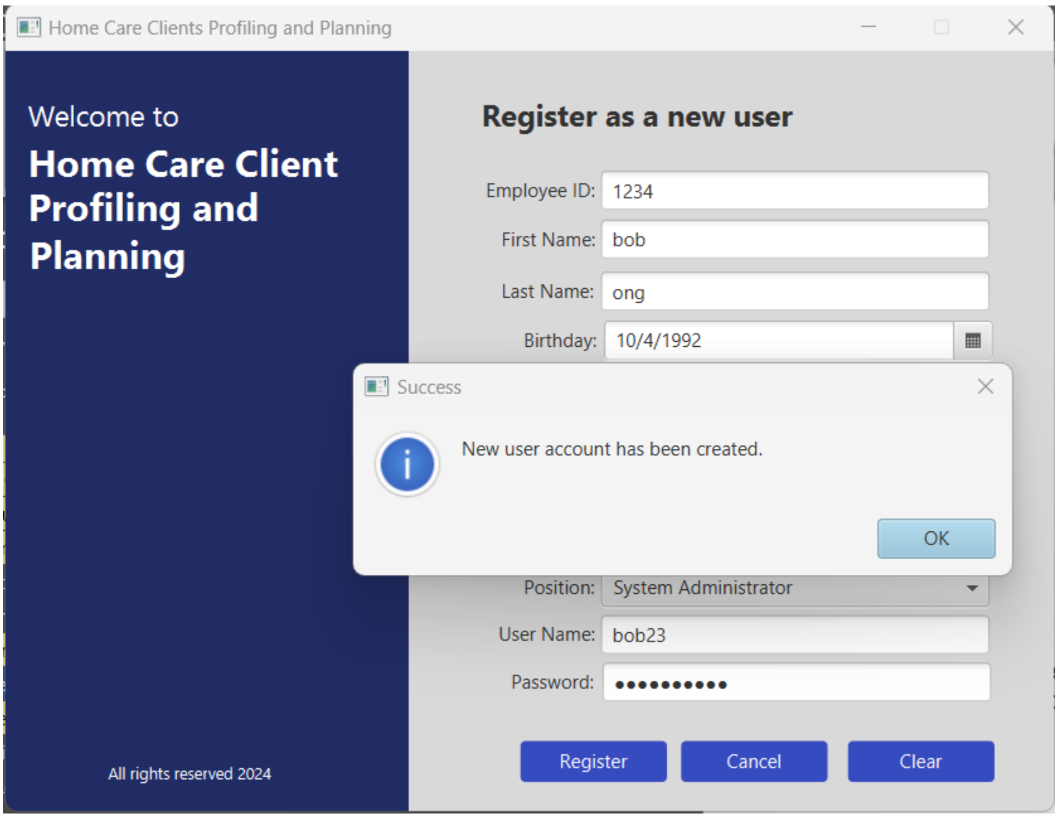
4. Logging in to the Application

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.

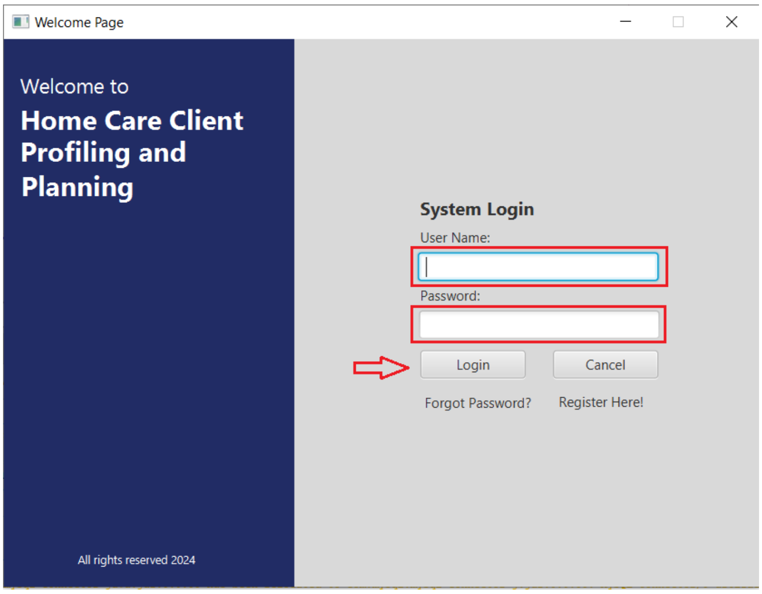


2. Fill all the fields and click on Register. Follow the on-screen validation prompts until the successful registration. Once registered, this automatically leads to system login



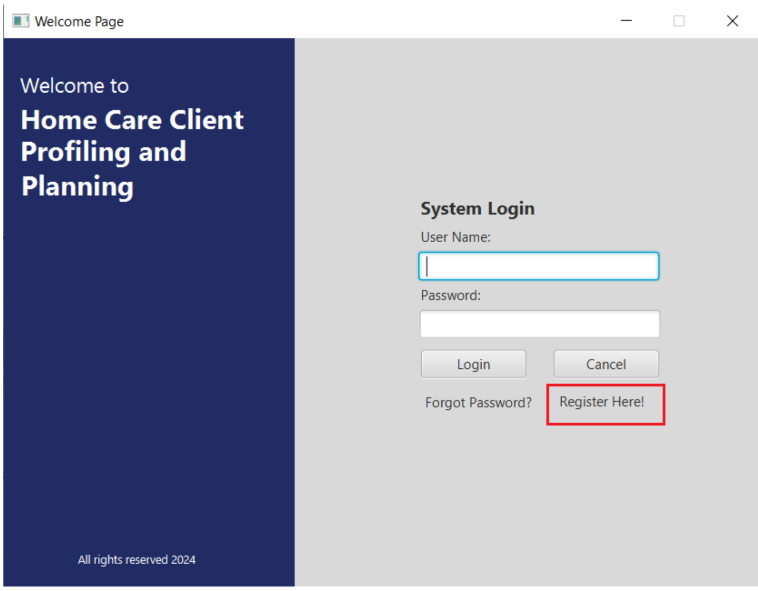
Subsequent Logins

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

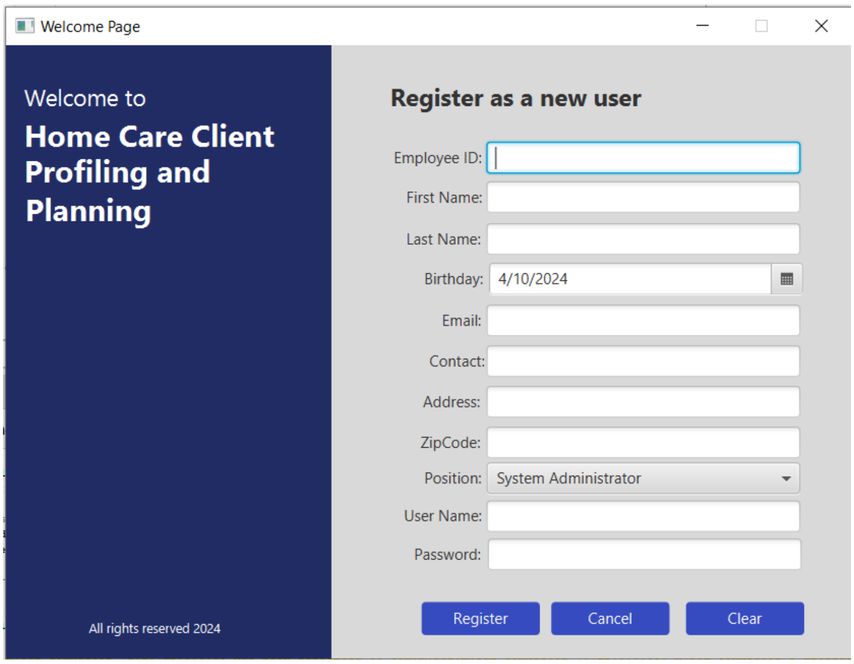


Subsequent User Registration

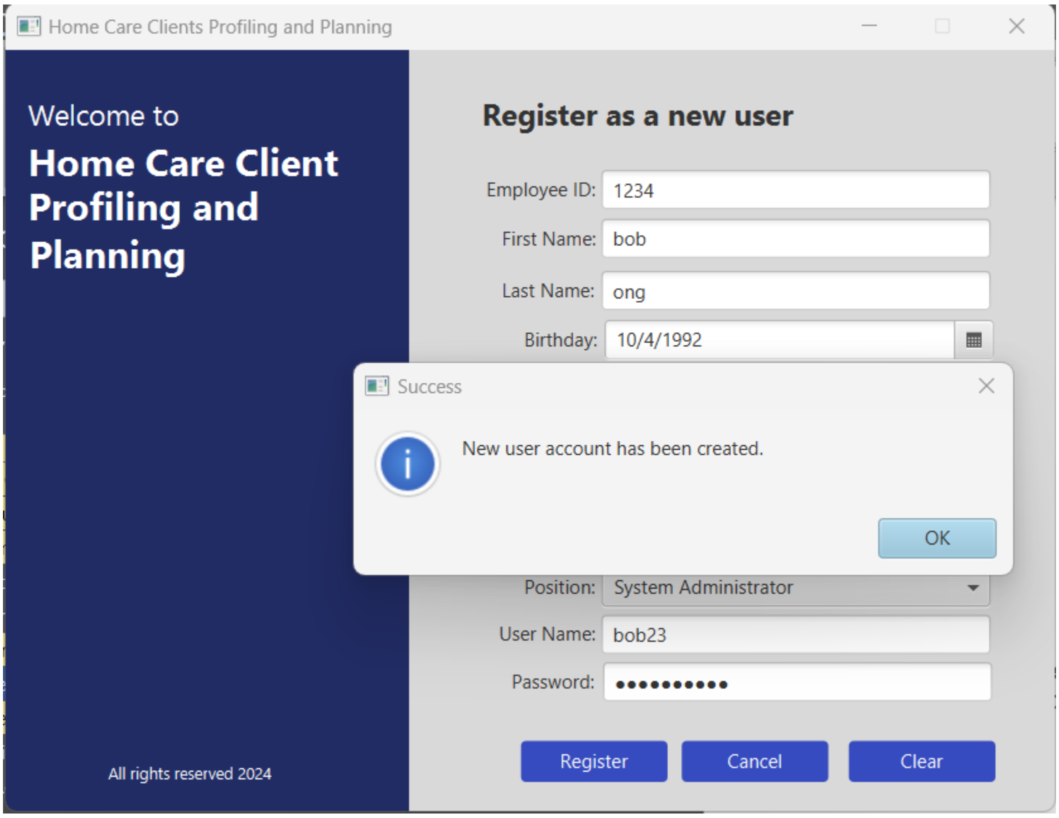
1. On the **Welcome Screen**, click **Register Here**.



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



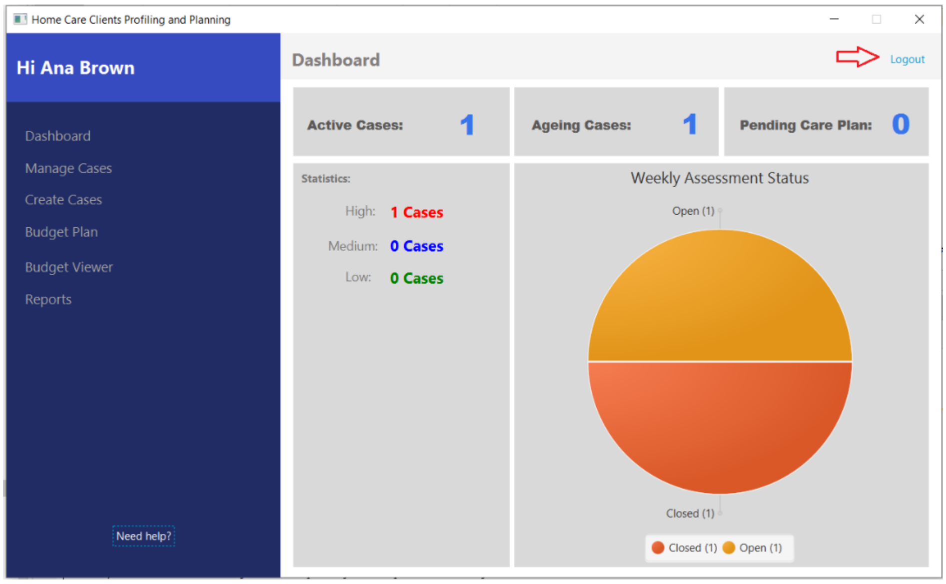
3. Once the account details are submitted, the system will generate a **new account** which can be used to navigate the system depending on the user role.



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

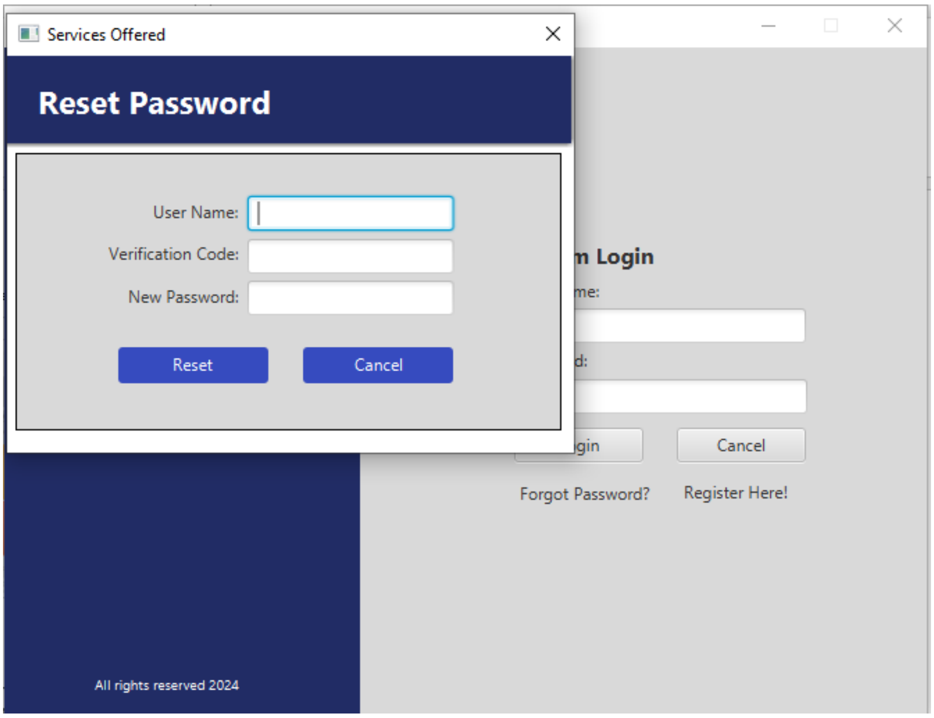
Logging out

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.

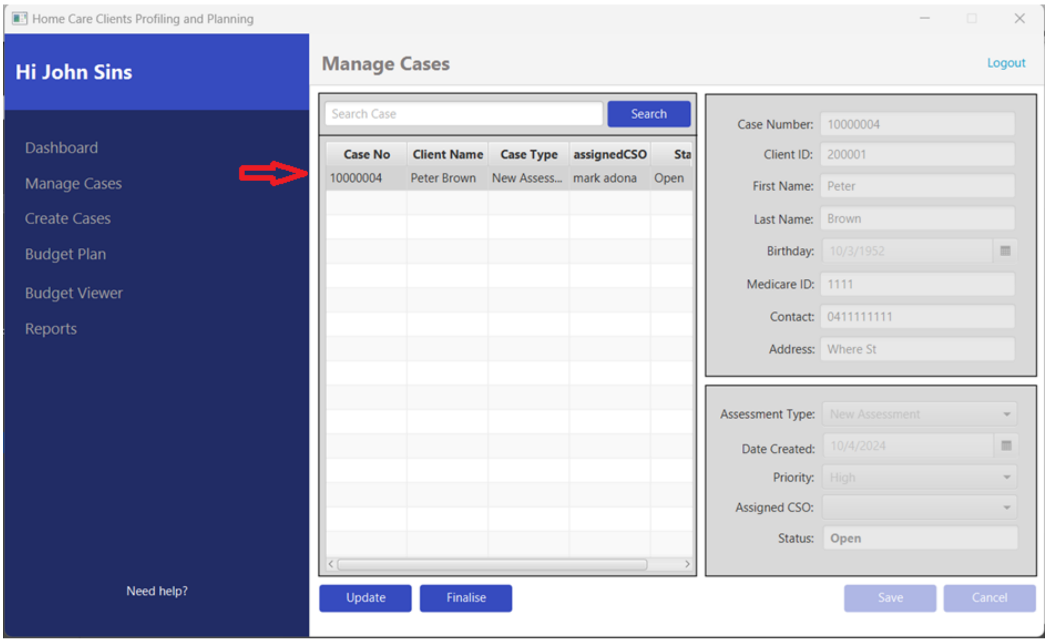


2. Click Reset to confirm the details and follow the on-screen instructions and confirmations.

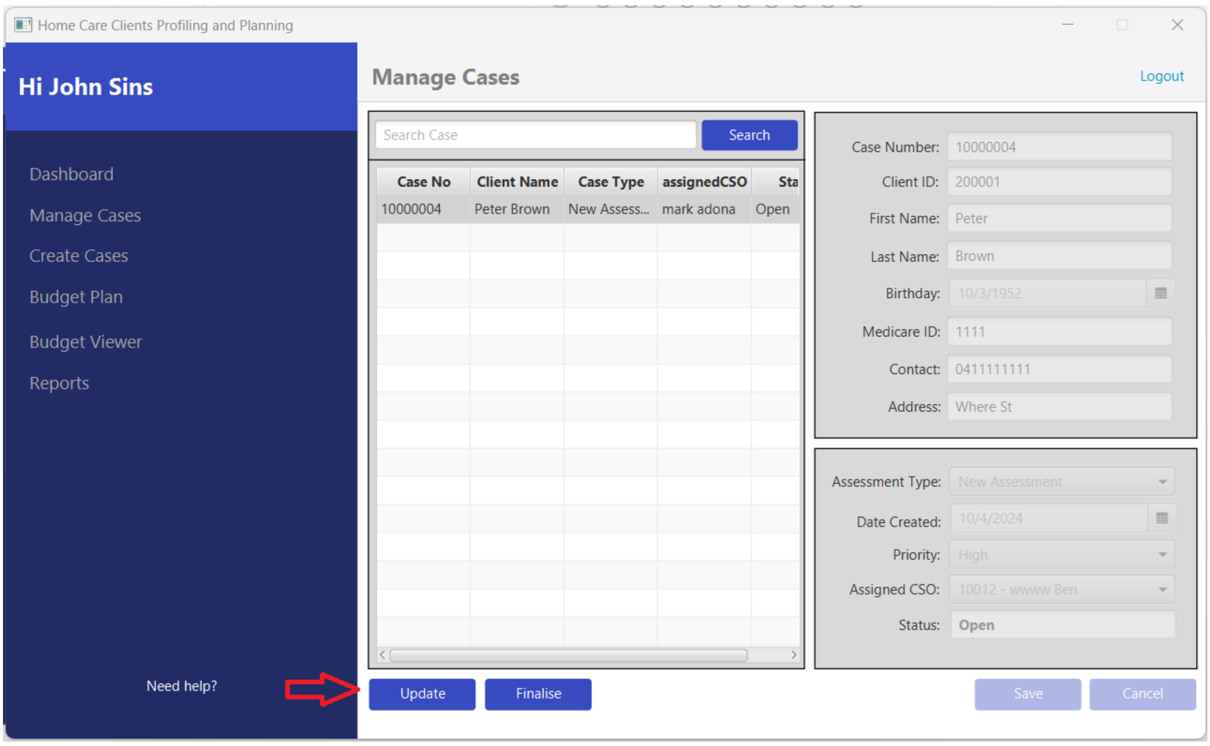
5. User Roles and Responsibilities

5.1 Case Manager

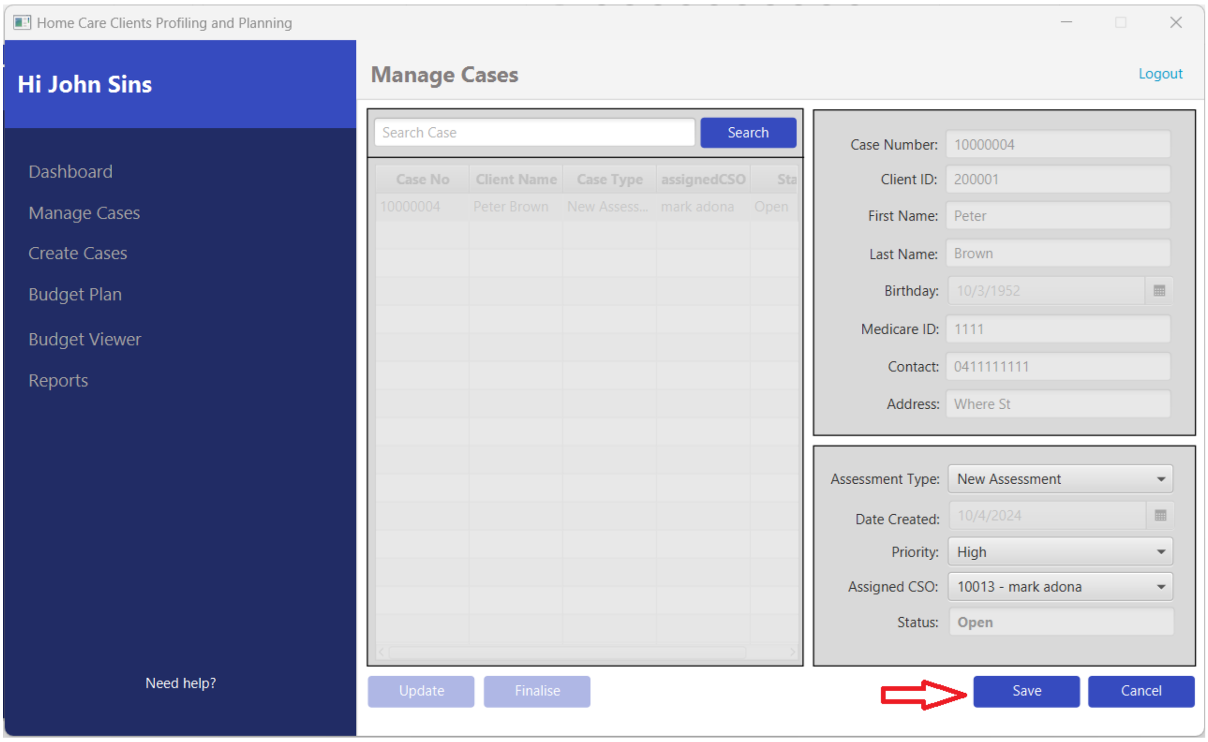
- **Case Management**
    1. To manage the cases, navigate to Manage Case and select a case that you wish to manage.

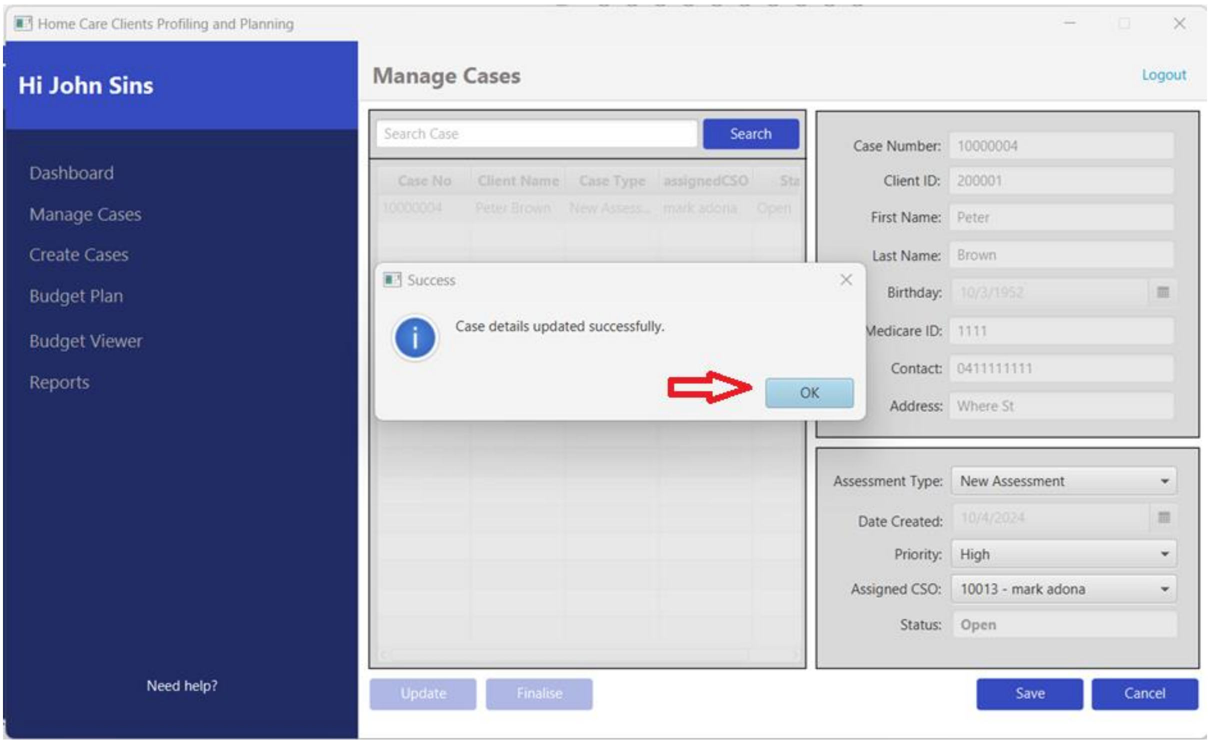


    2. To update the Case Assignment, Priority Level and Assessment Type, click on the Update Button.

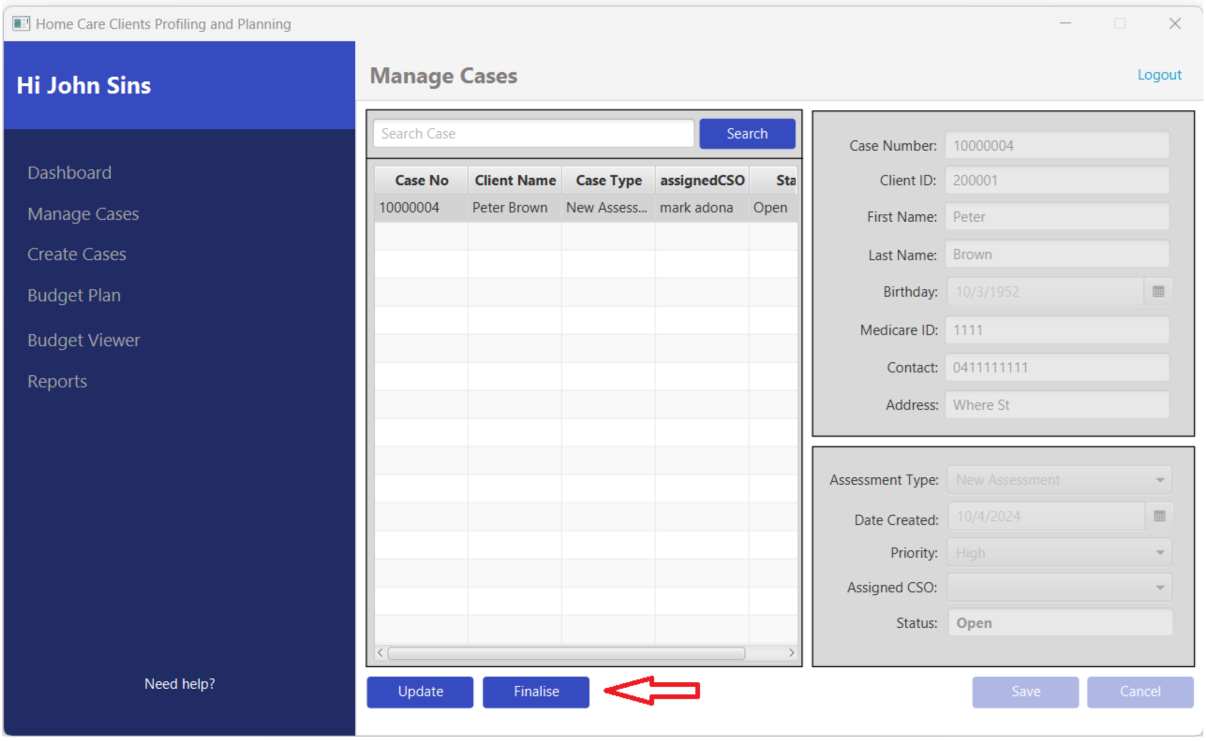


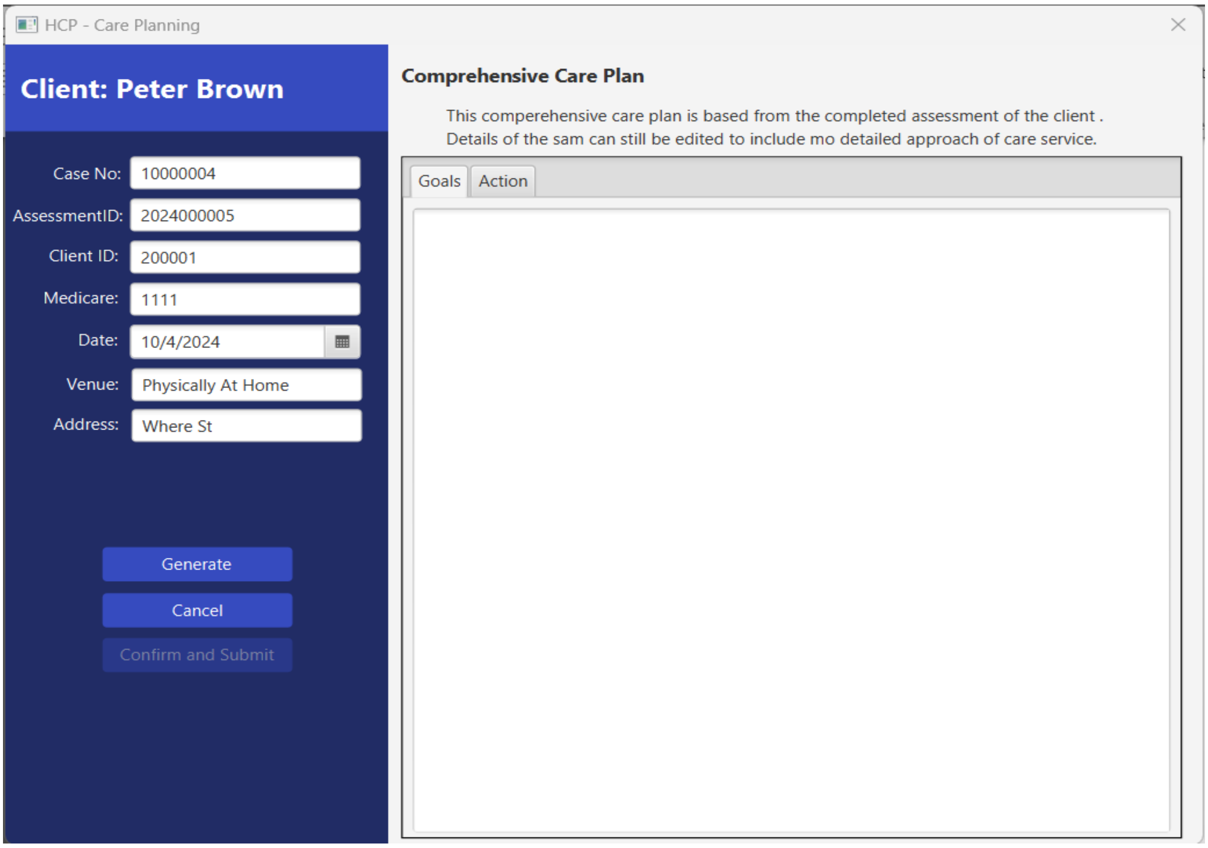
3. Change as necessary then click on save to complete. Confirmation dialog will prompt.



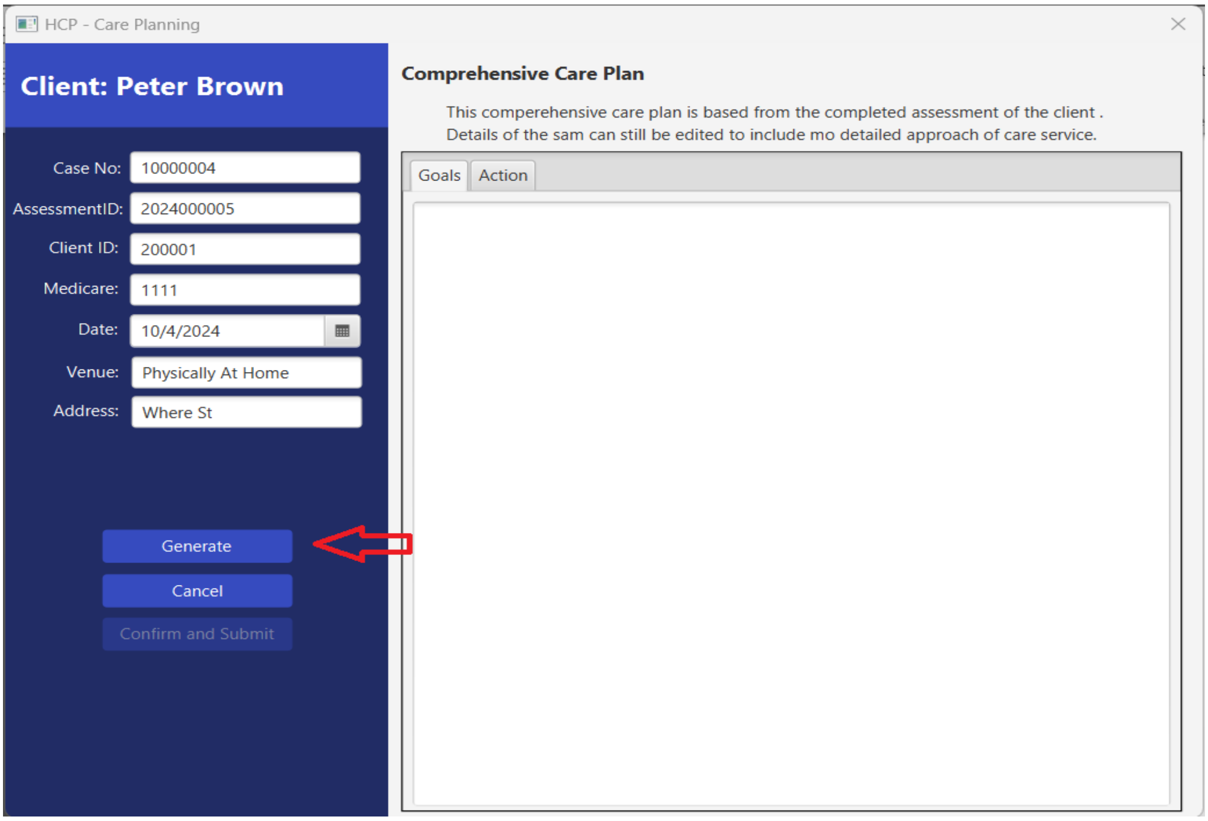


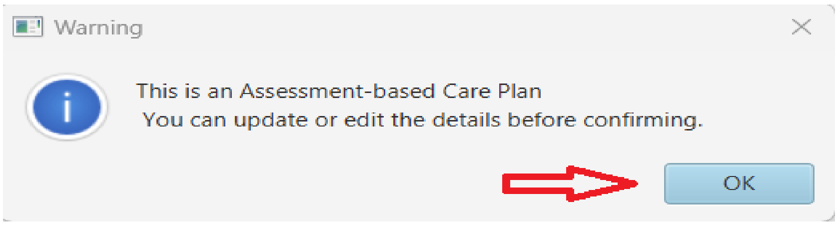
4. To Create Care Plan / Generate Care Plan, select a case from the table and click on Finalise Button. This will open a new window that will automatically generate a care plan.

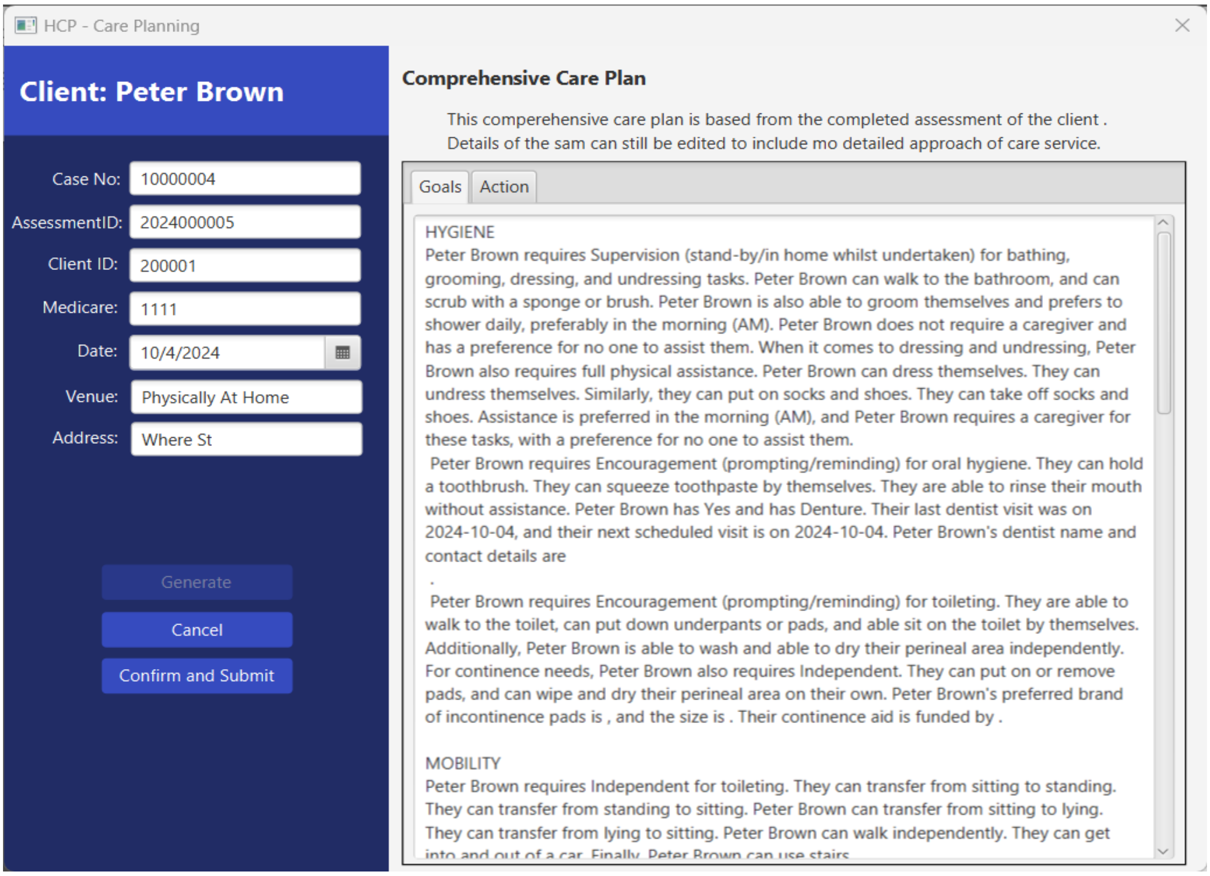




5. In the new window, click on Generate Button. This automates the generation of care plan. After generating, it will be enabled to allow updates from the user.


HCP - Care Planning
Client: Peter Brown
Case No: 10000004
AssessmentID: 2024000005
Client ID: 200001
Medicare: 1111
Date: 10/4/2024
Venue: Physically At Home
Address: Where St
Generate
Cancel
Confirm and Submit
Comprehensive Care Plan
This comperehensive 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


Warning
This is an Assessment-based Care Plan
You can update or edit the details before confirming.
OK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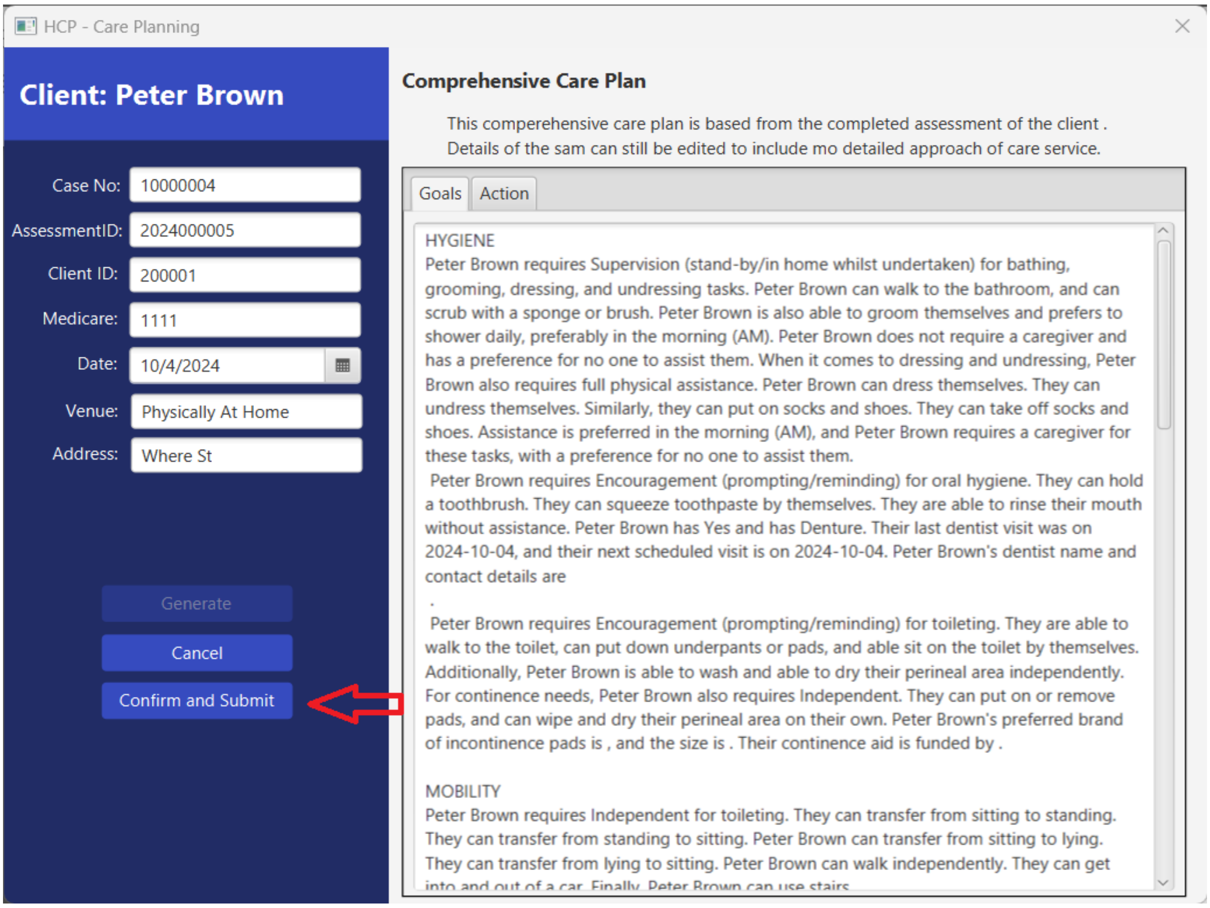
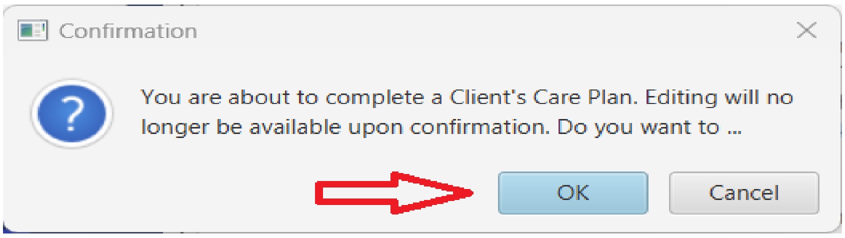
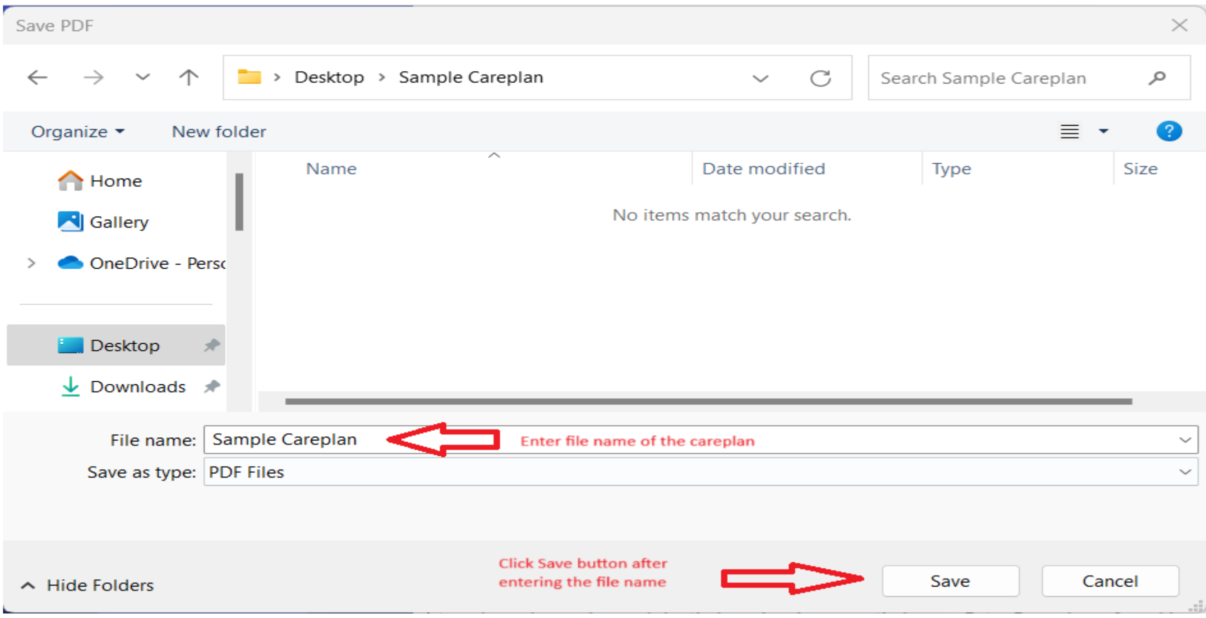
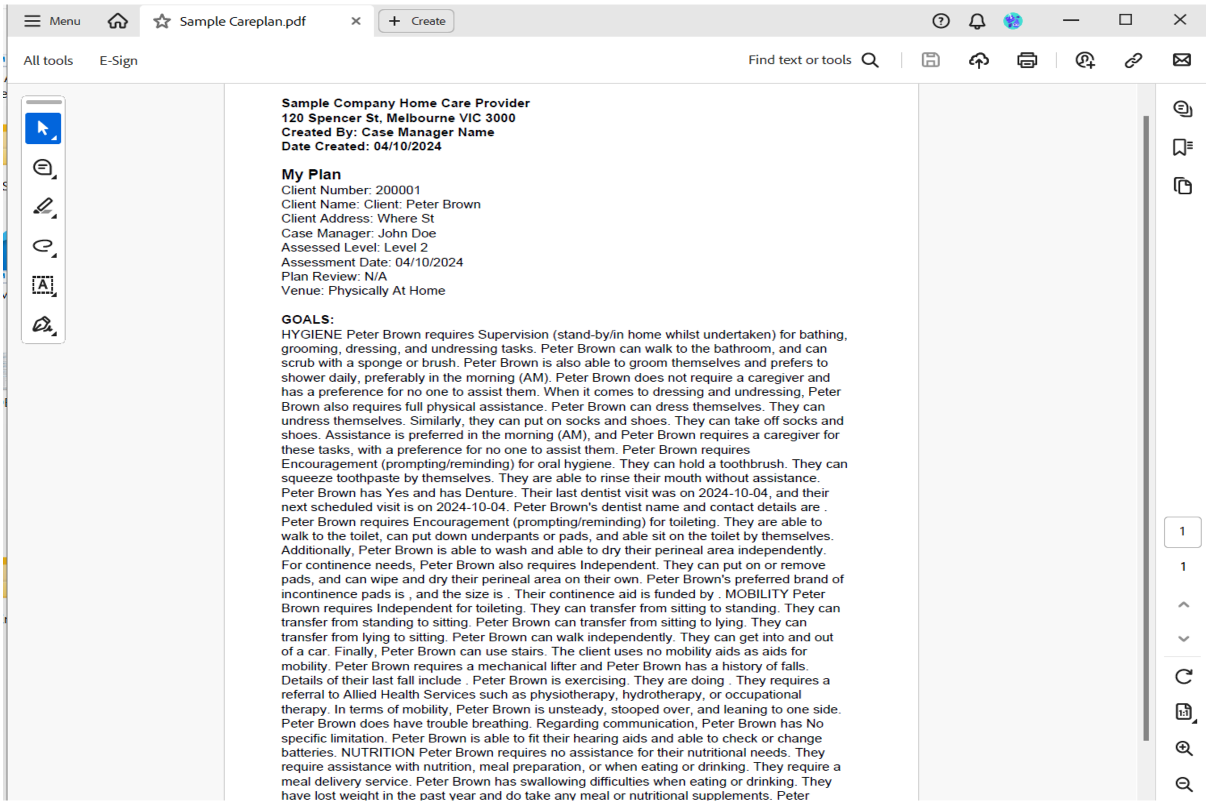
Cancel
Confirm and Submit
Comprehensive Care Plan
This comperehensive care plan is based from the completed assessment of the client .
Details of the sam can still be edited to include mo detailed approach of care service.
Goals
Action
HYGIENE
Peter Brown requires Supervision (stand-by/in home whilst 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

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)







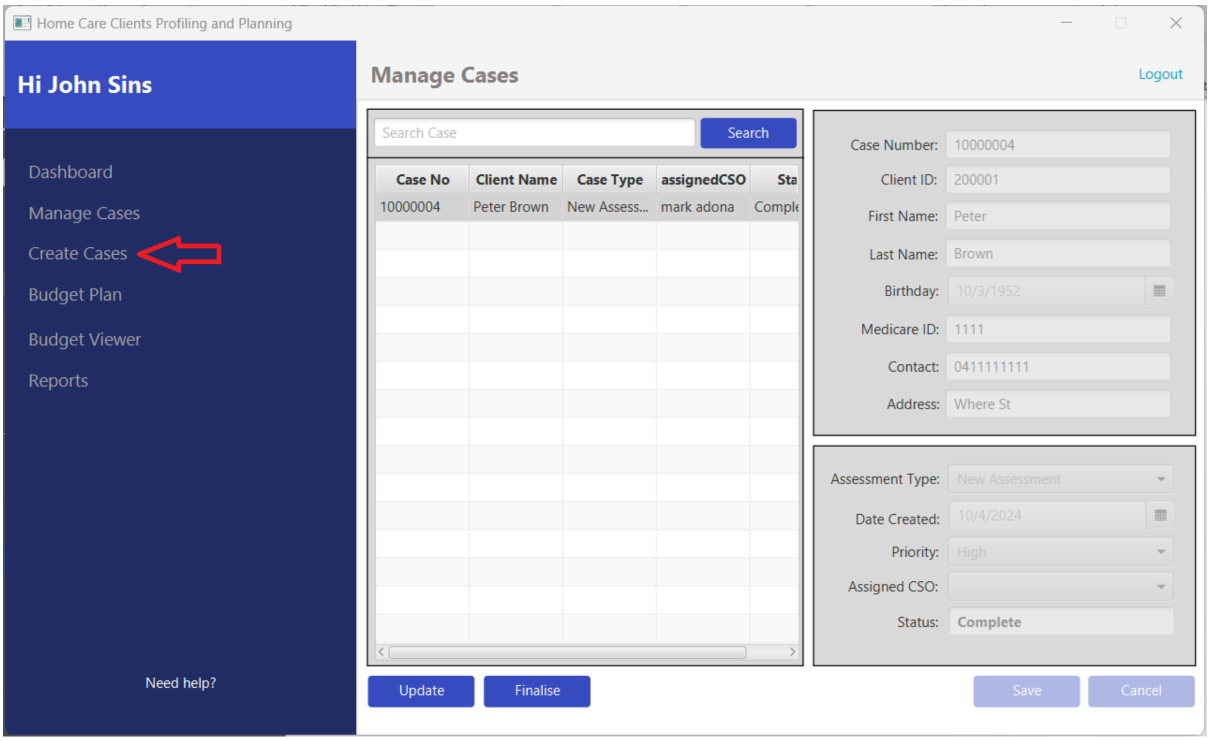


Sample Company Home Care Provider
120 Spencer St, Melbourne VIC 3000
Created By: Case Manager Name
Date Created: 04/10/2024

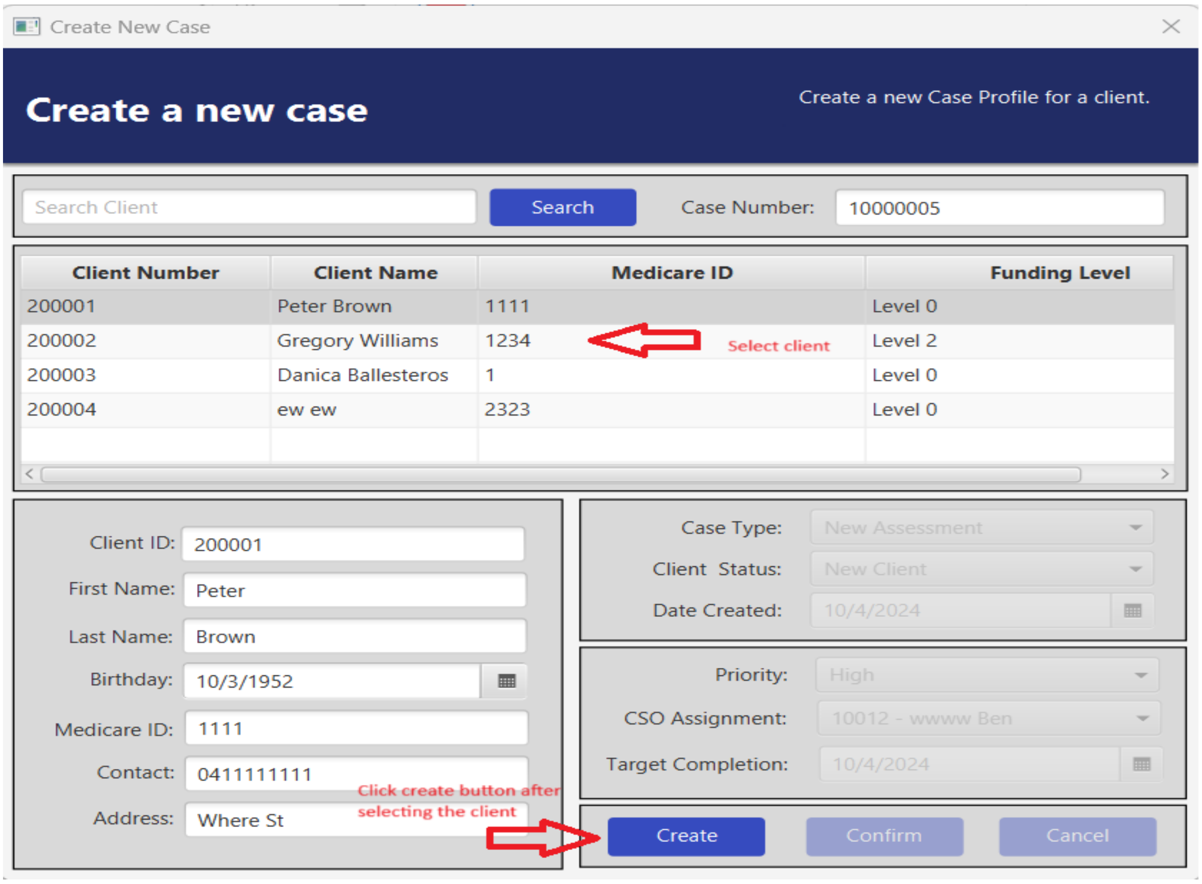
My Plan
Client Number: 200001
Client Name: Client: Peter Brown
Client Address: Where St
Case Manager: John Doe
Assessed Level: Level 2
Assessment Date: 04/10/2024
Plan Review: N/A
Venue: Physically At Home

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

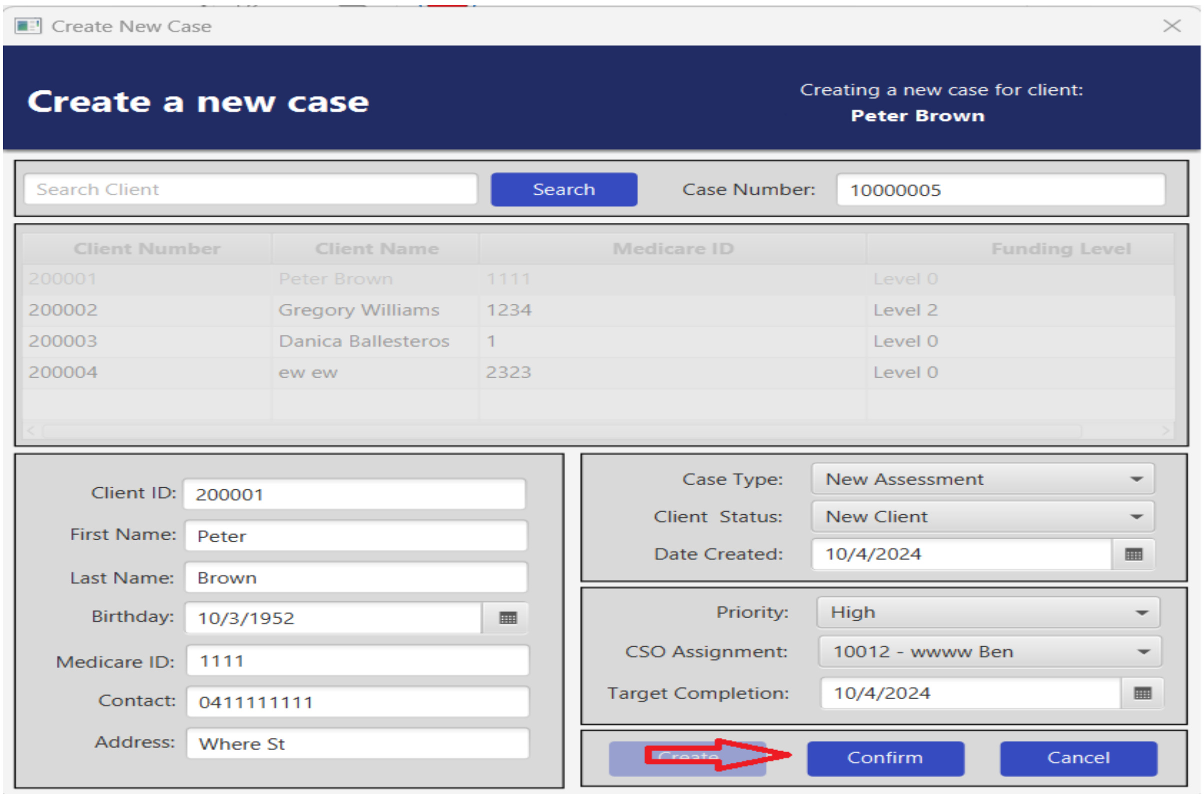
- **Case Creation**
    1. To create a new case, click on the Create Cases from the left panel menu. This will open a new window.

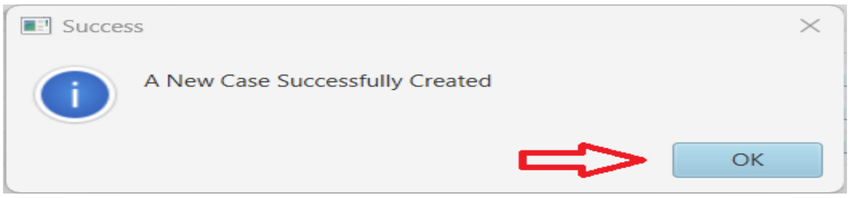


2. Select a client from the list and click on Create Button.

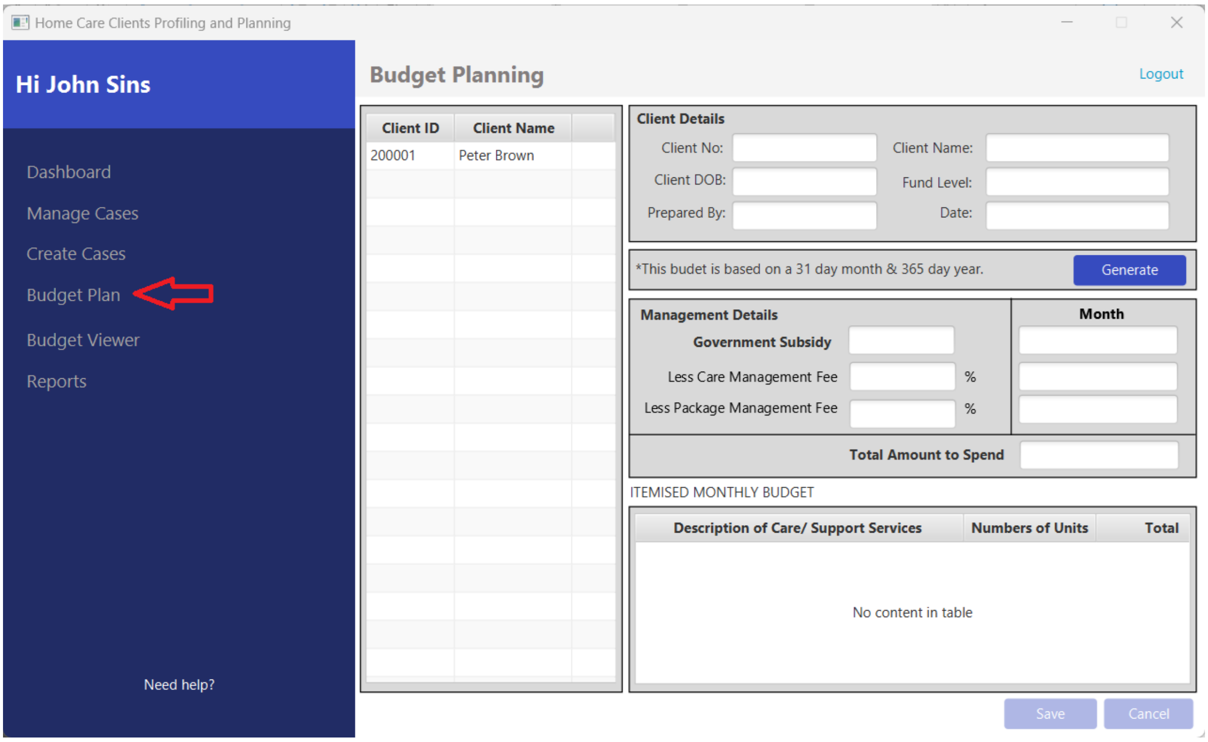


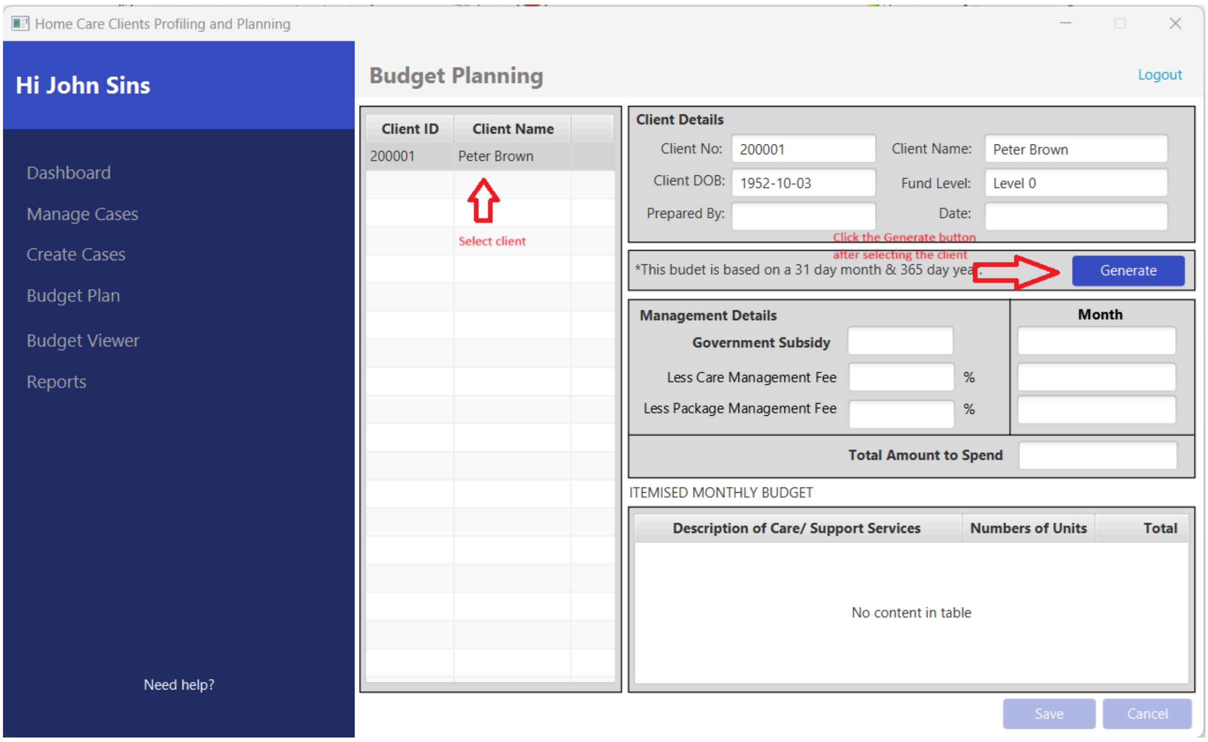
3. Manage the case information the click on the confirm button. This will automatically create a new case for a specific and chosen client.



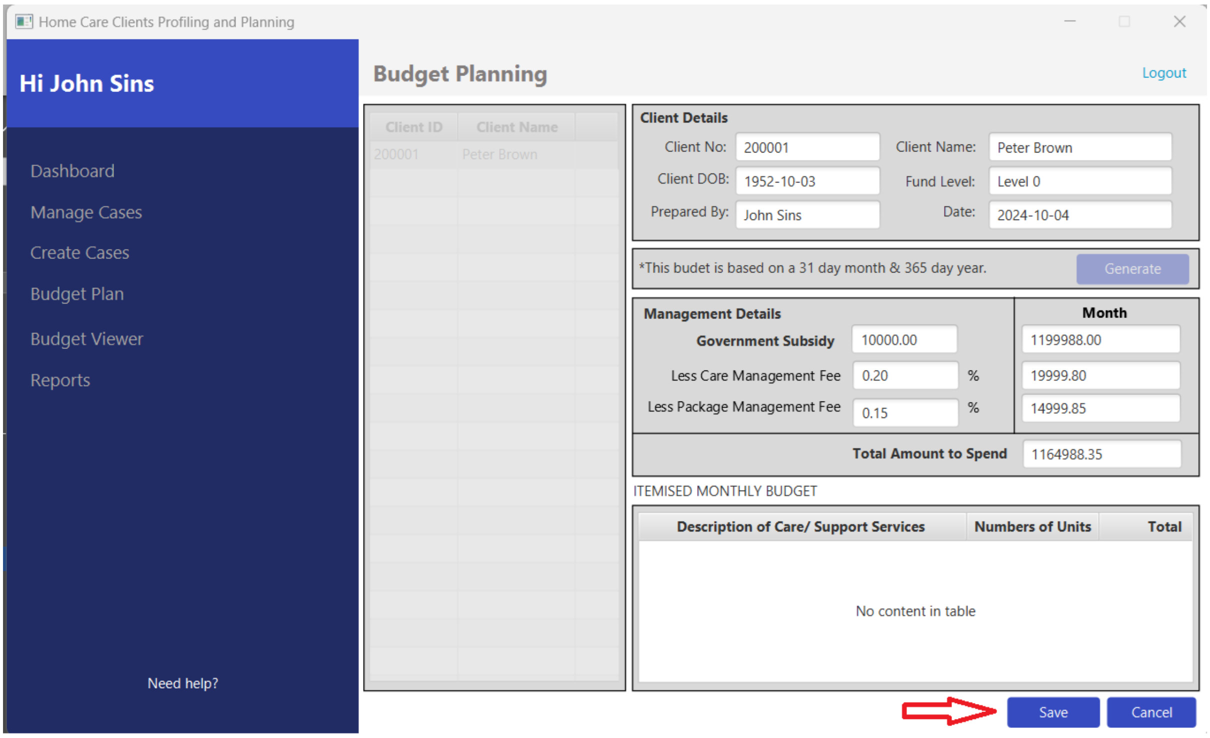


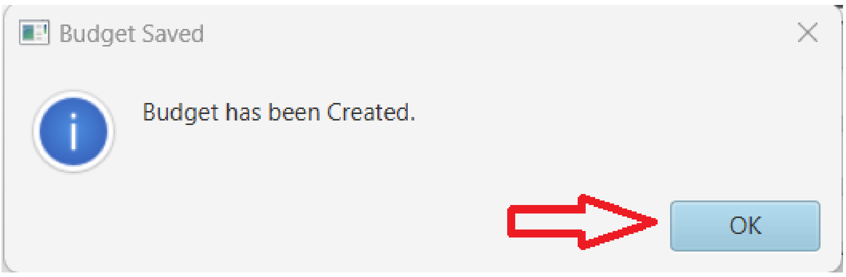
- **Budget Planning**
    1. To create a new budget plan, navigate to the Budget Plan from the side menu. Select from the list of Ready for Budget clients then click on generate. This will automatically fill all the information on the screen.





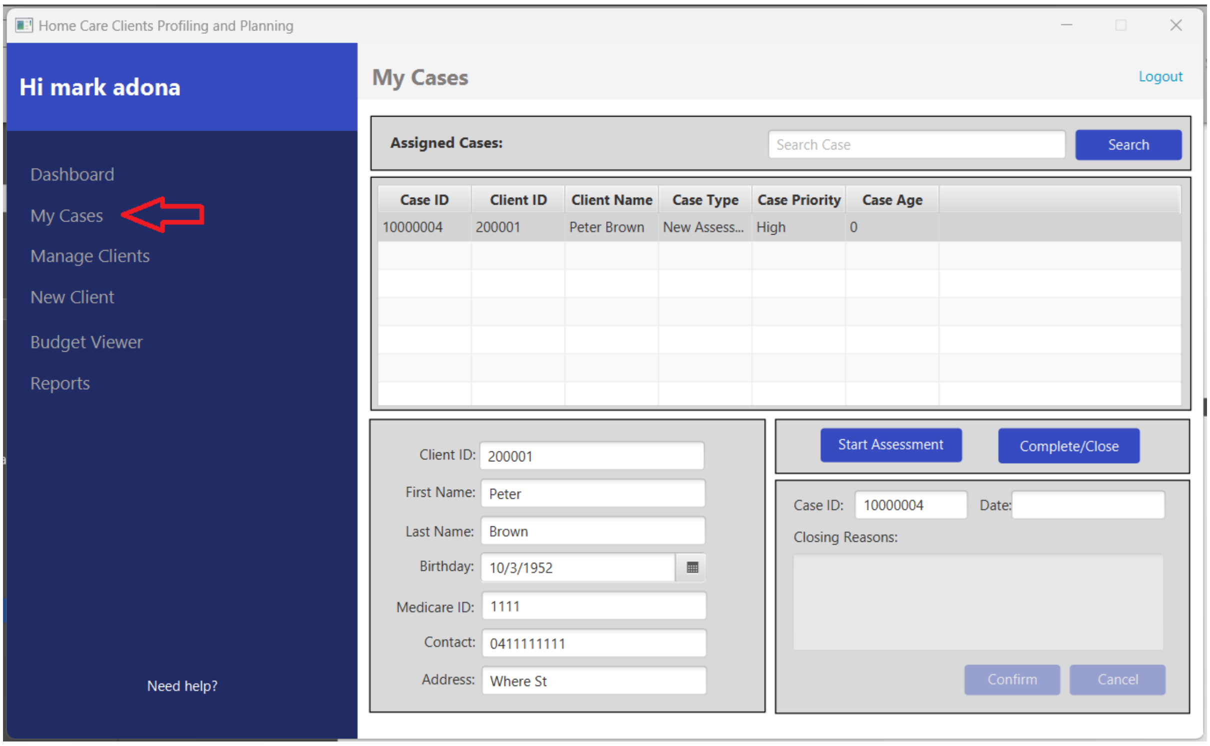
2. Click the save Buton to confirm the generated budget plan. Prompts will be confirm the creation.





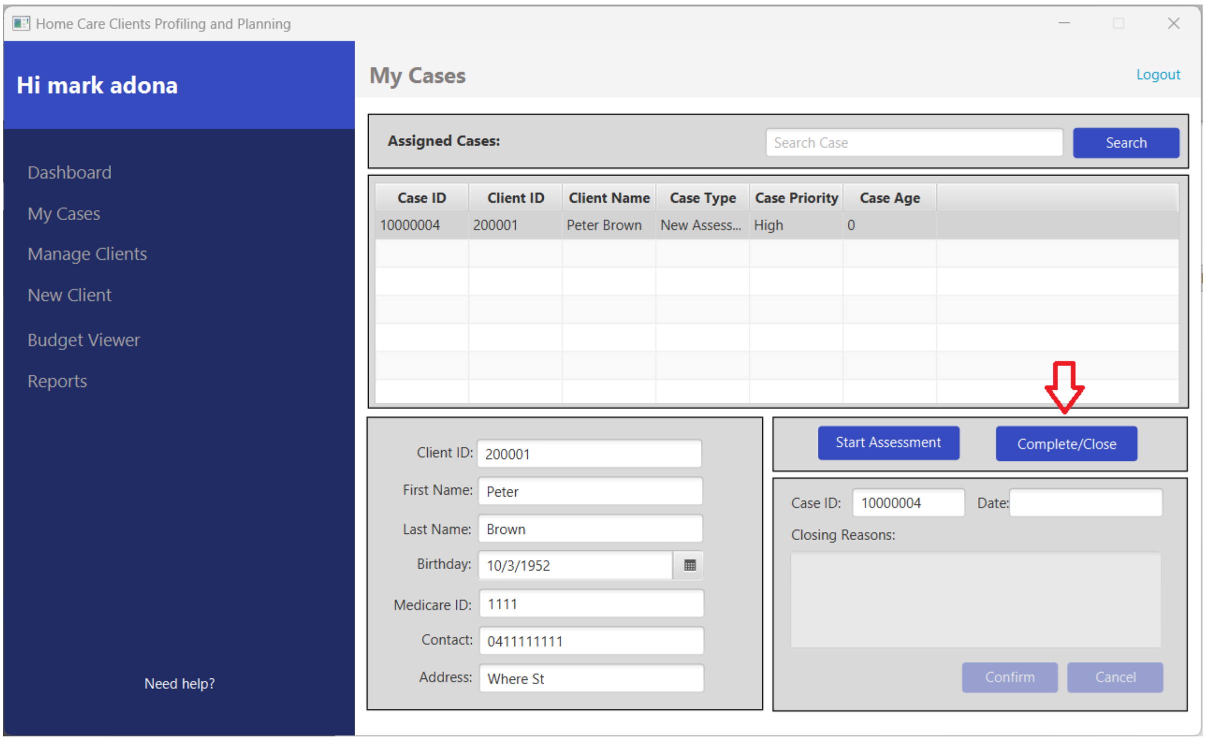
5.2 Client Services Officer (CSO)

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

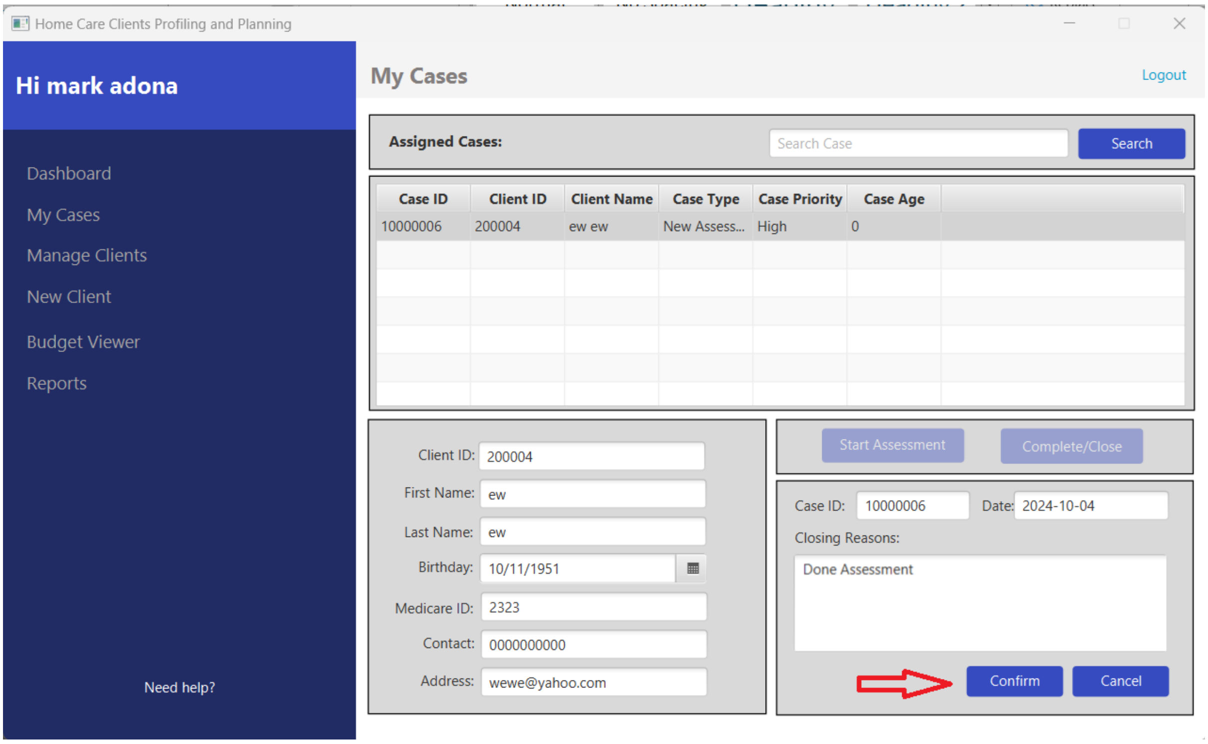


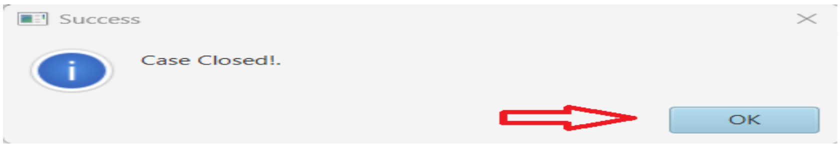
2. **Closing a Case**

   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

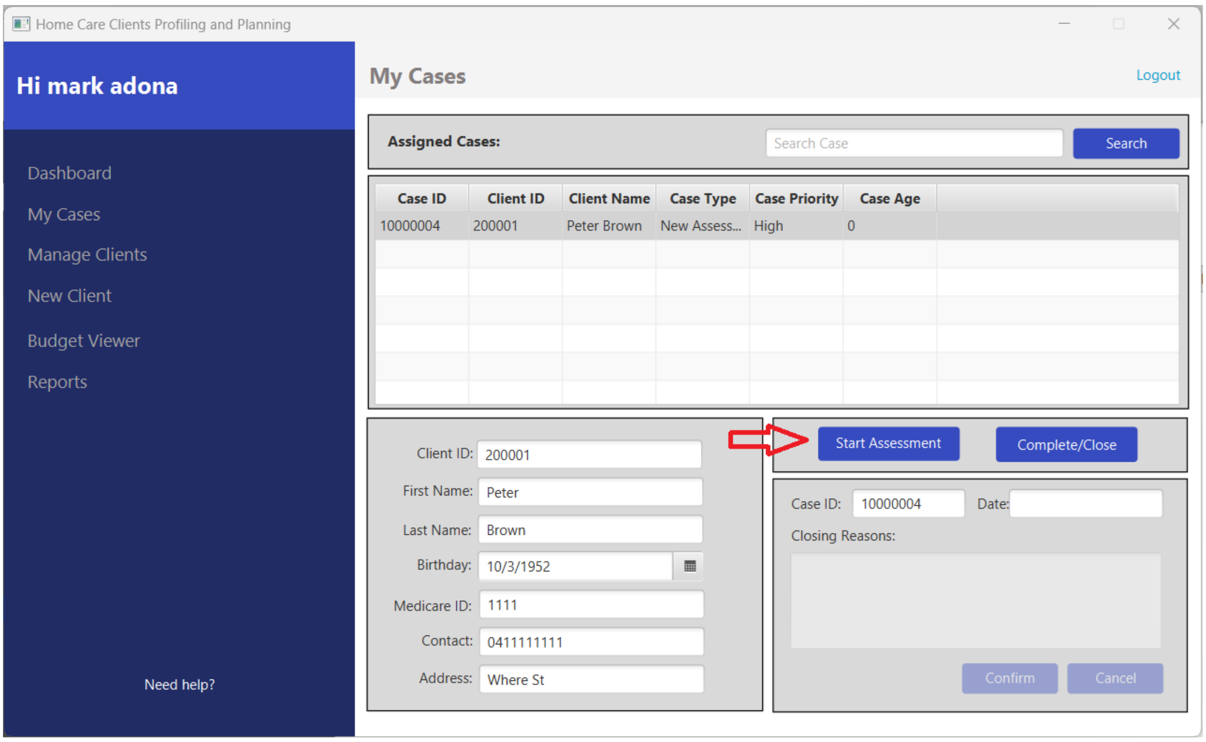


Click on confirm button to close the case.

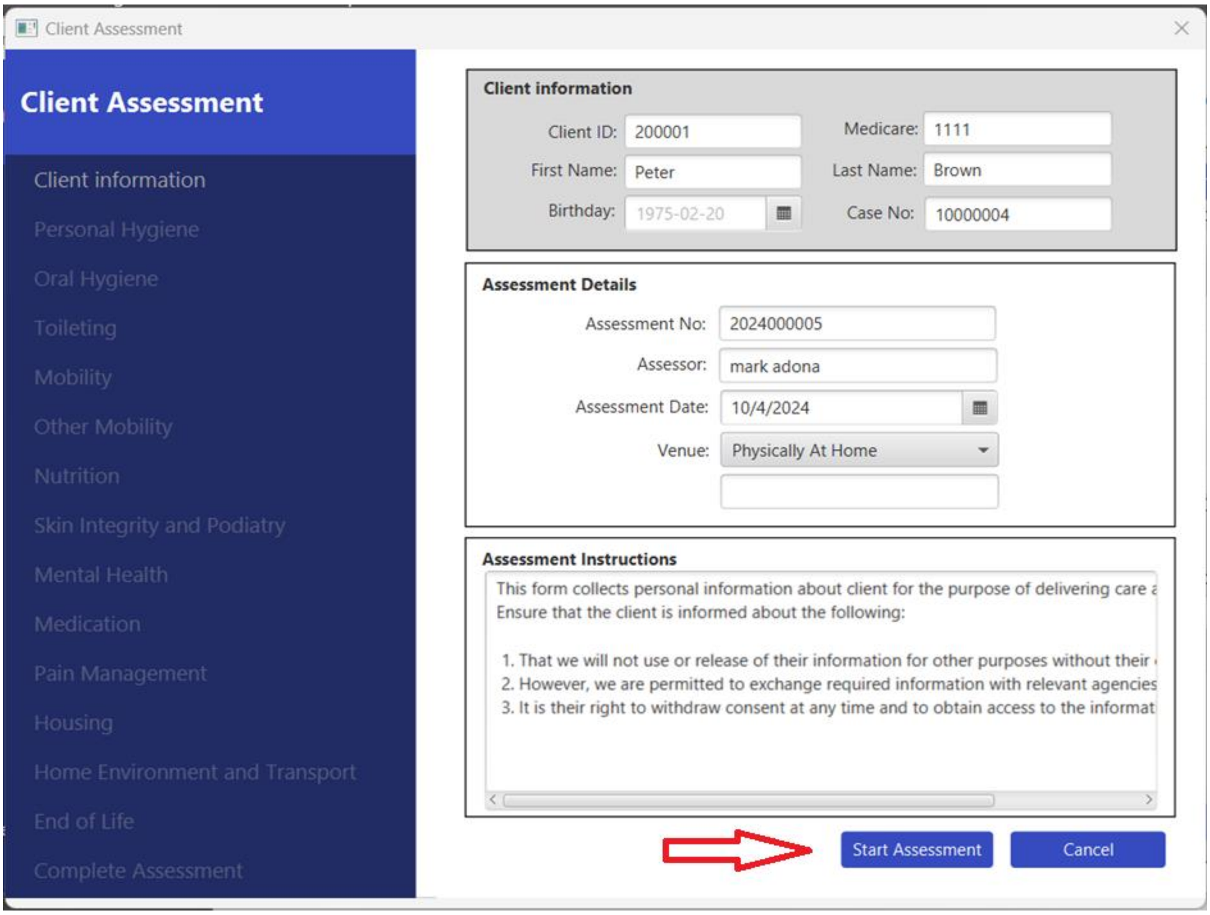




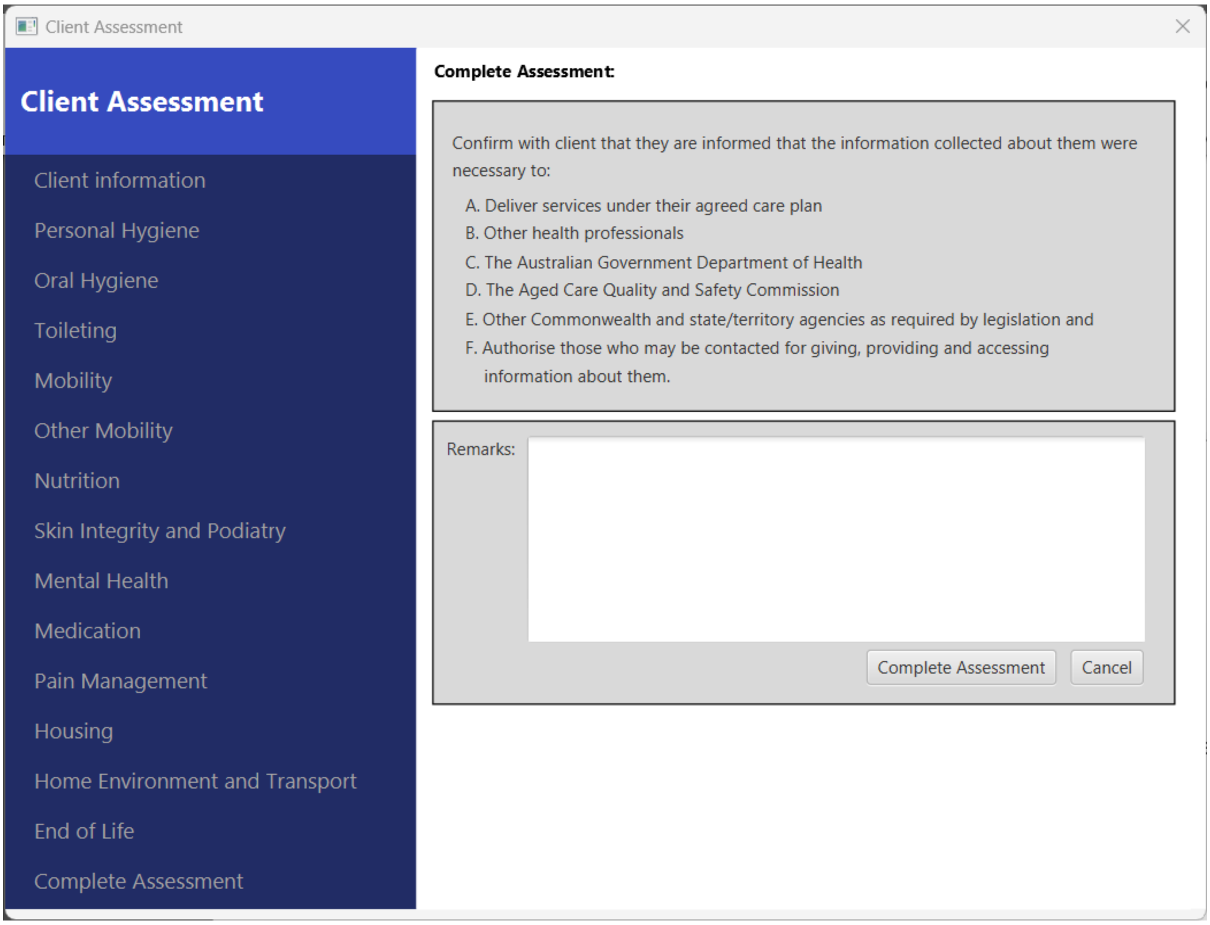
3. **Making Assessments**
To proceed with the assessments, select a client entry from the table and click the Start Assessment.



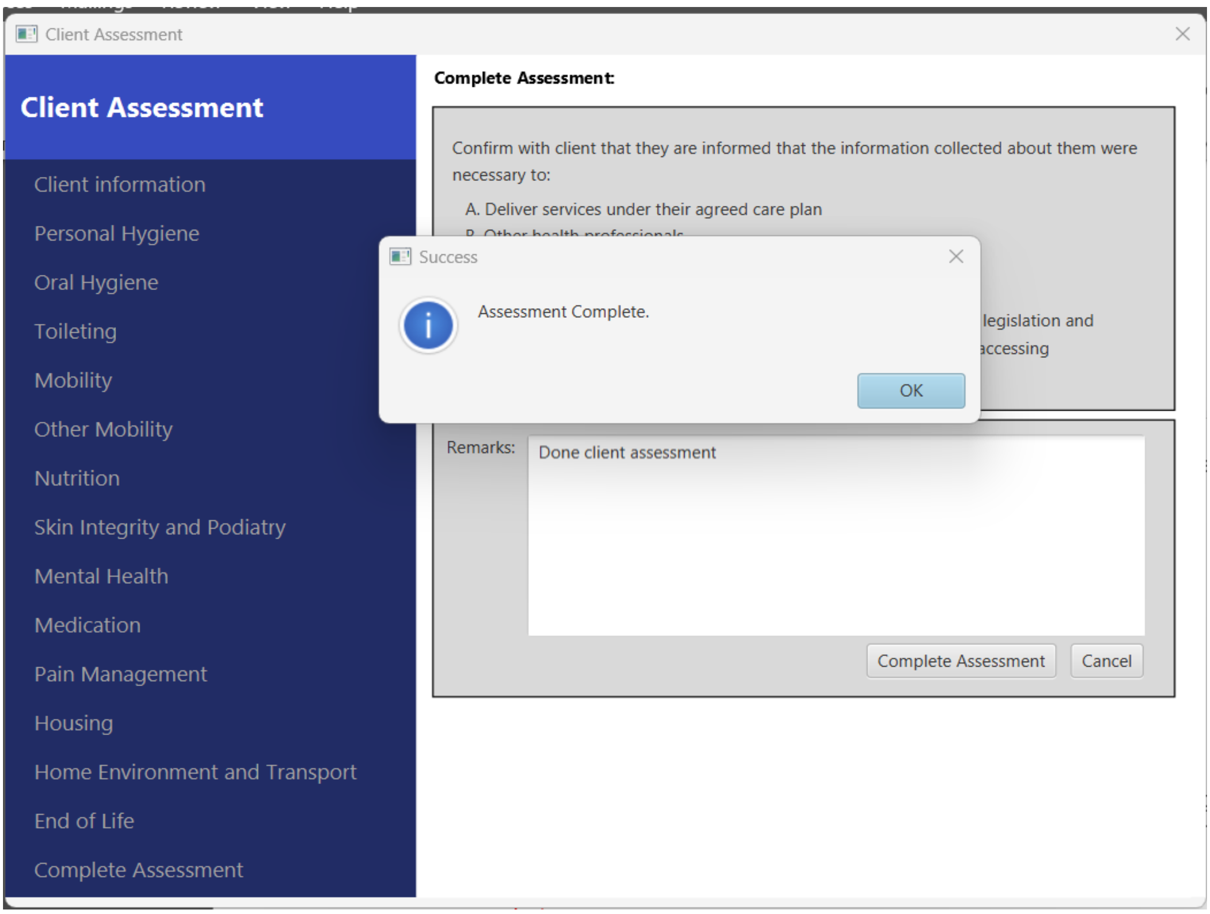
- A new window will open which contain the client and case information. Follow the on-screen instructions to complete the assessment.



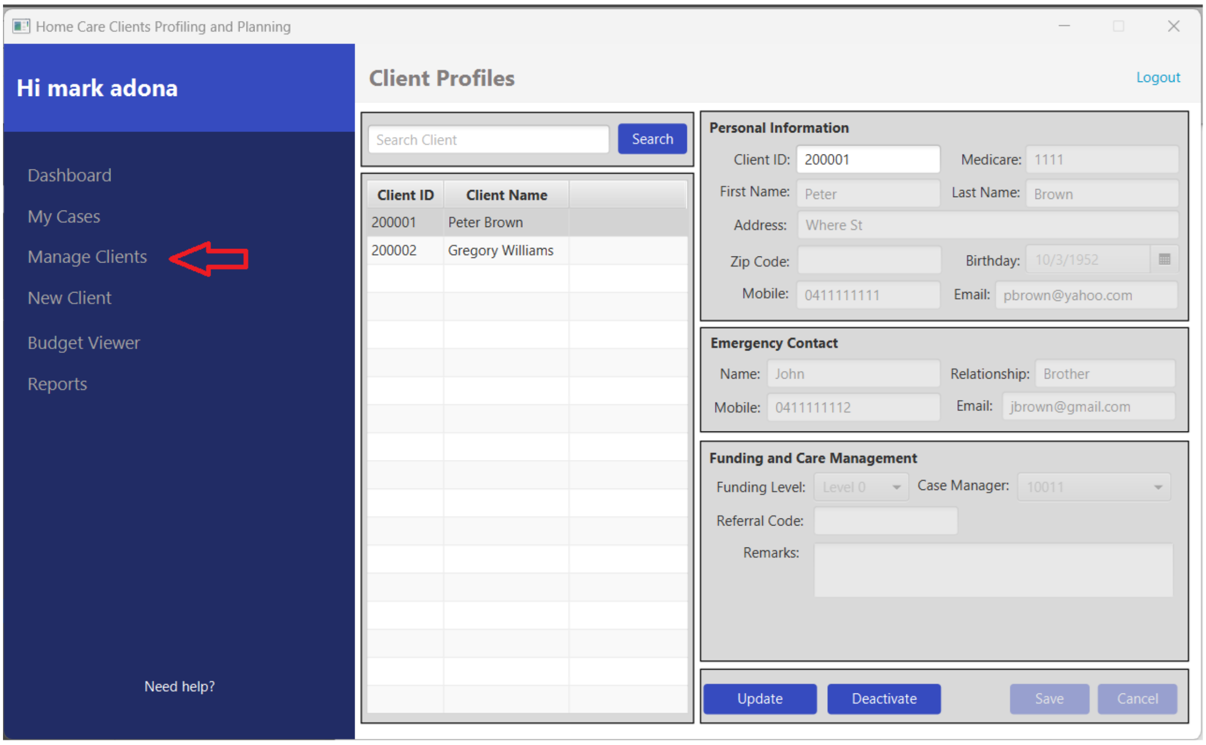
- At the end of the assessment, it will require to put on some remarks prior to confirming the completion.

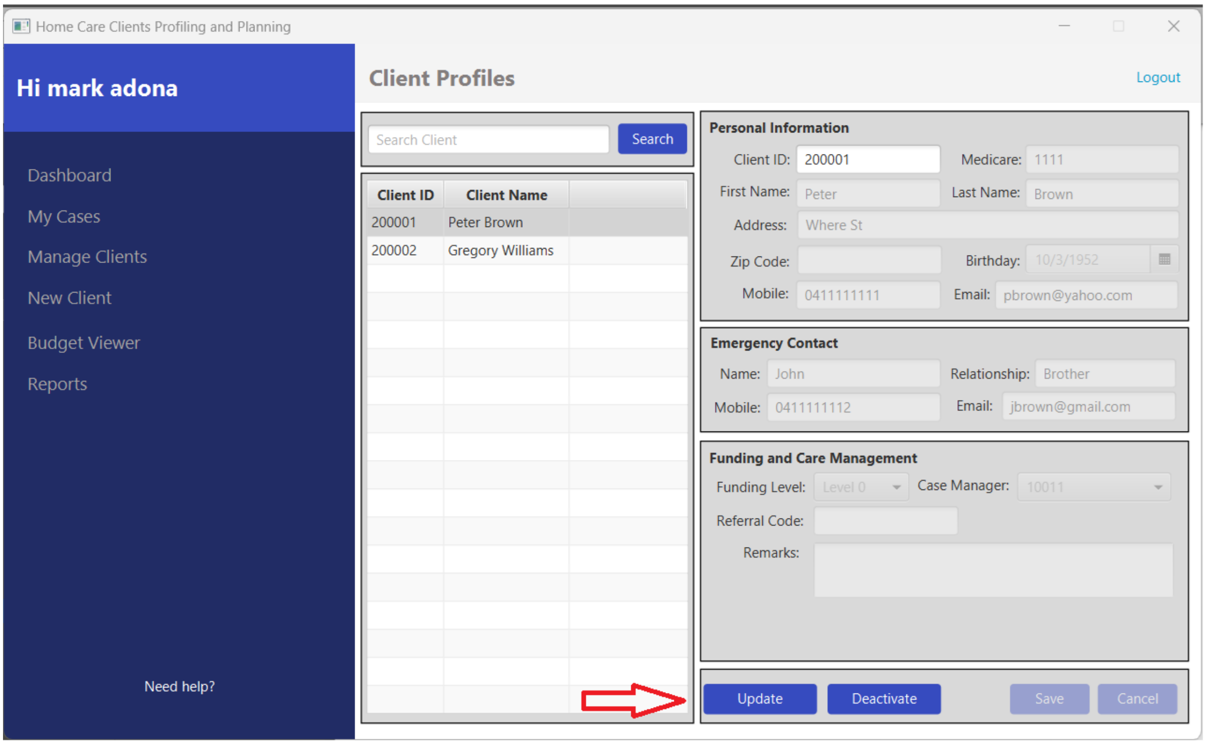


- A dialog will pop up to confirm the successful completion of the assessment.

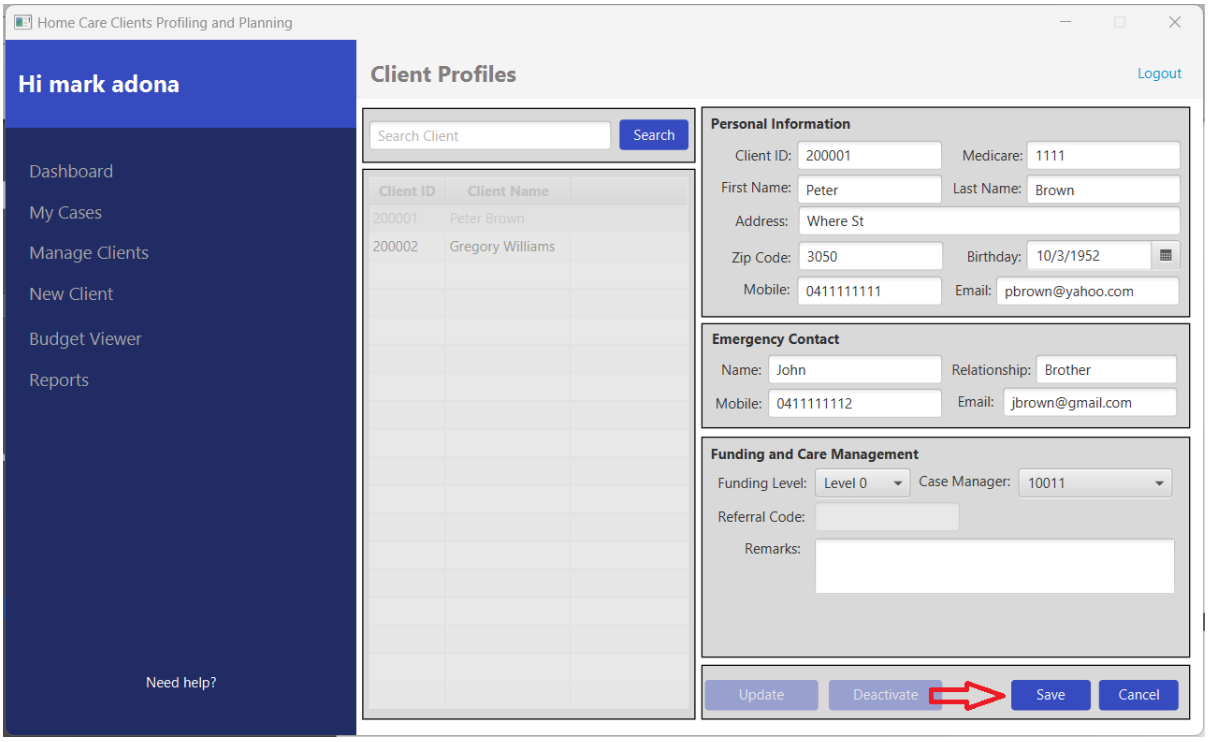


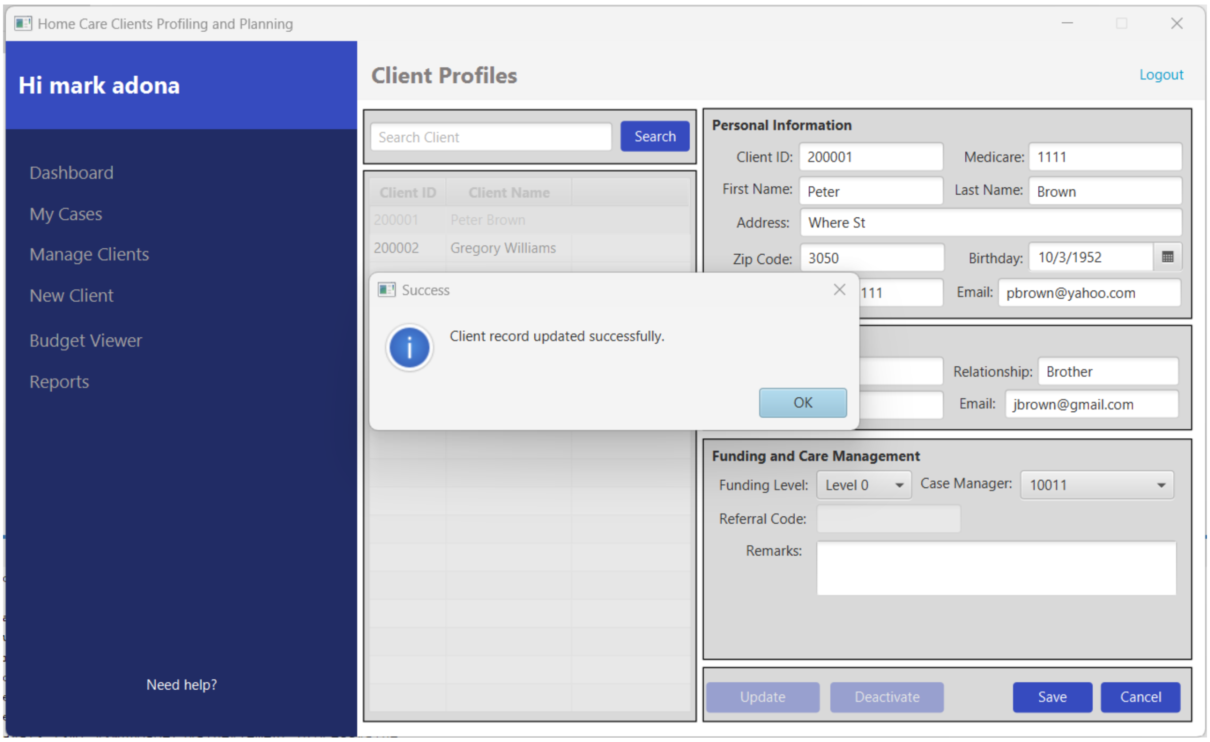
- **Client Profile Management**
  1. To update client information, navigate to the Manage Client by clicking on the left panel menu, select a client from the table and click on update.



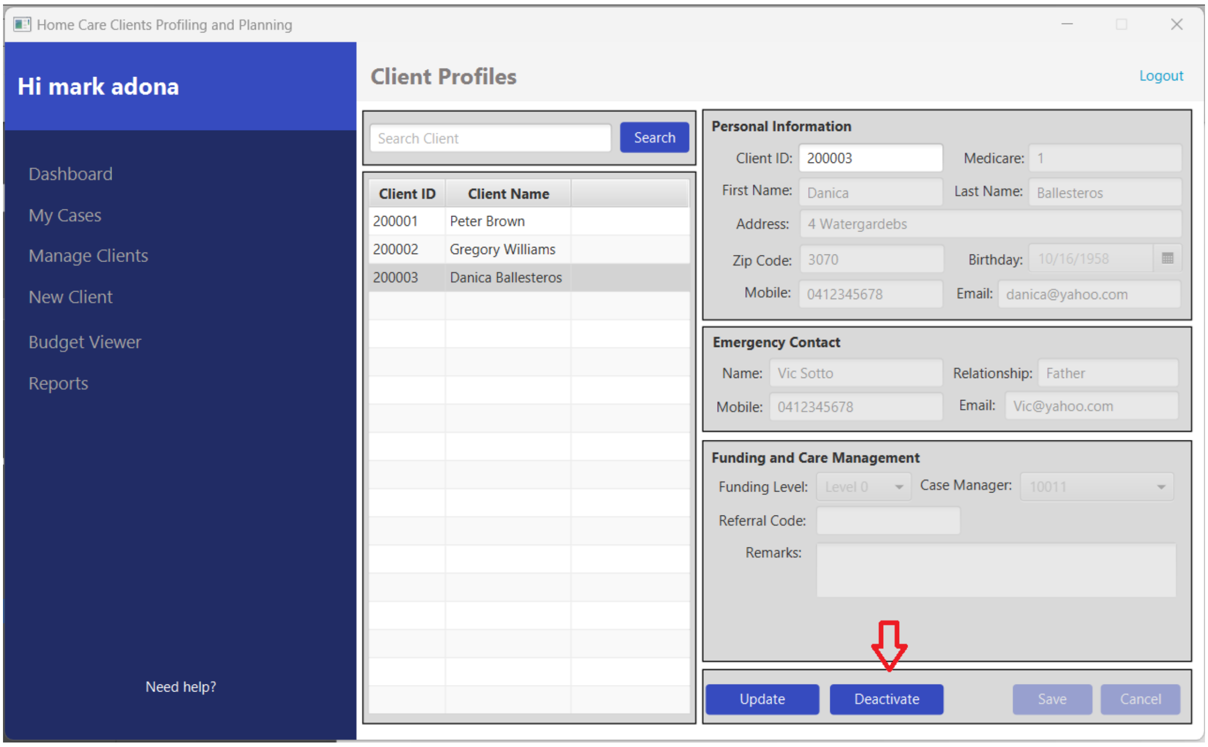


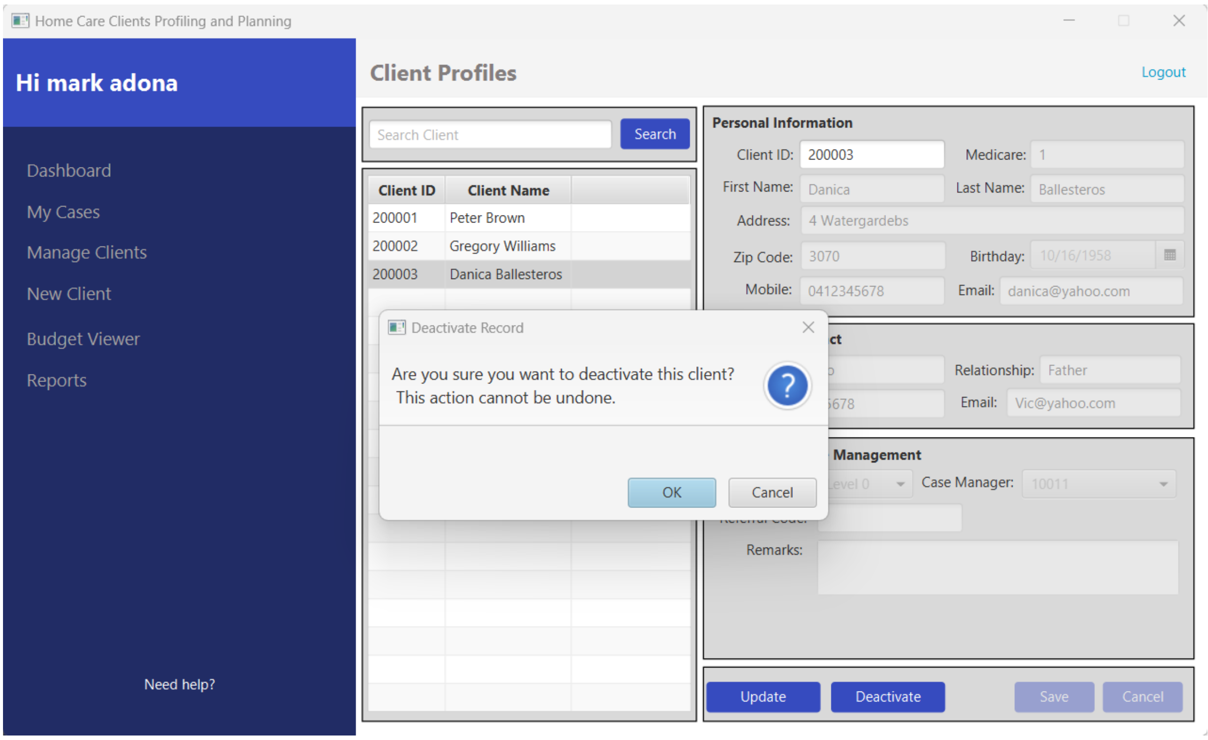
  2. Update the details as intended then click on save. Follow the prompts once successful the system will confirm.

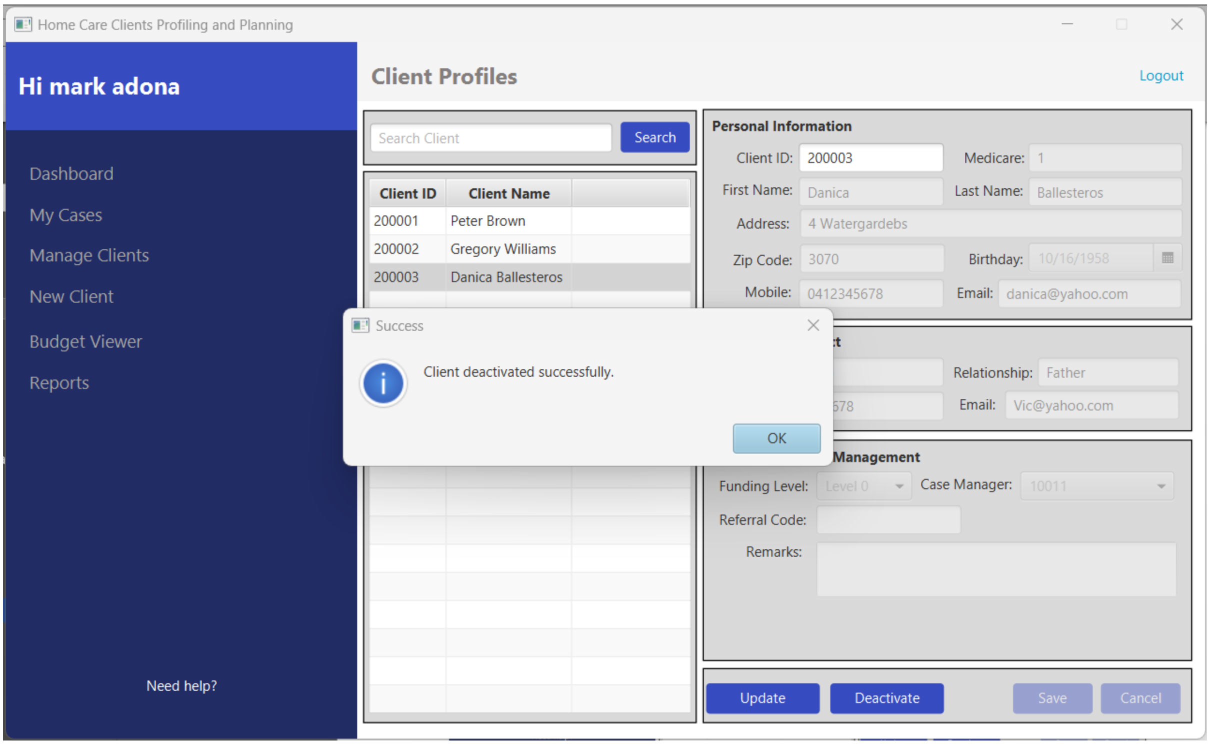




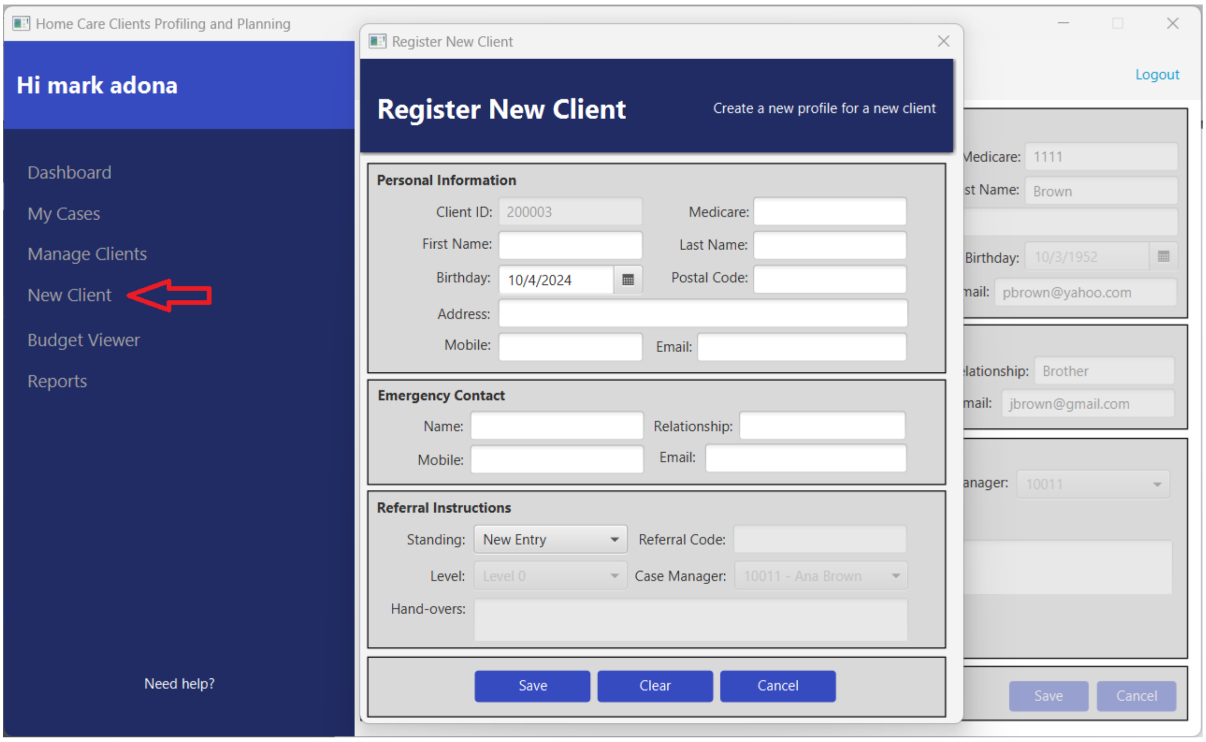
3. To deactivate a user profile, select a client from the table and click on Deactivate. Follow the on-screen prompts to complete the deactivation.


Home Care Clients Profiling and Planning
Hi mark adona
Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?
Client Profiles
Logout
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

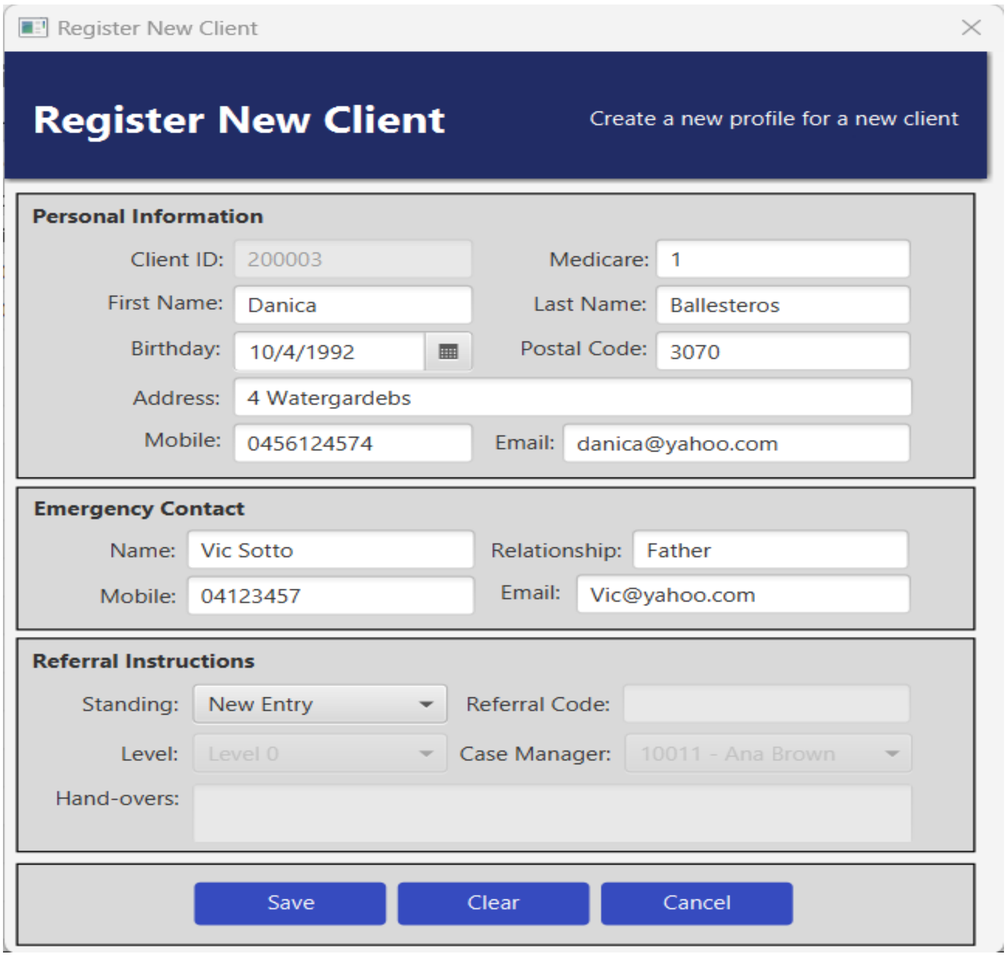

Home Care Clients Profiling and Planning
Hi mark adona
Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?
Client Profiles
Logout
Search Client
Search
Client ID
Client Name
200001
Peter Brown
200002
Gregory Williams
200003
Danica Ballesteros
Personal Information
Client ID:
200003
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
Relationship:
Father
Email:
Vic@yahoo.com
Management
Case Manager:
10011
Remarks:
Update
Deactivate
Save
Cancel



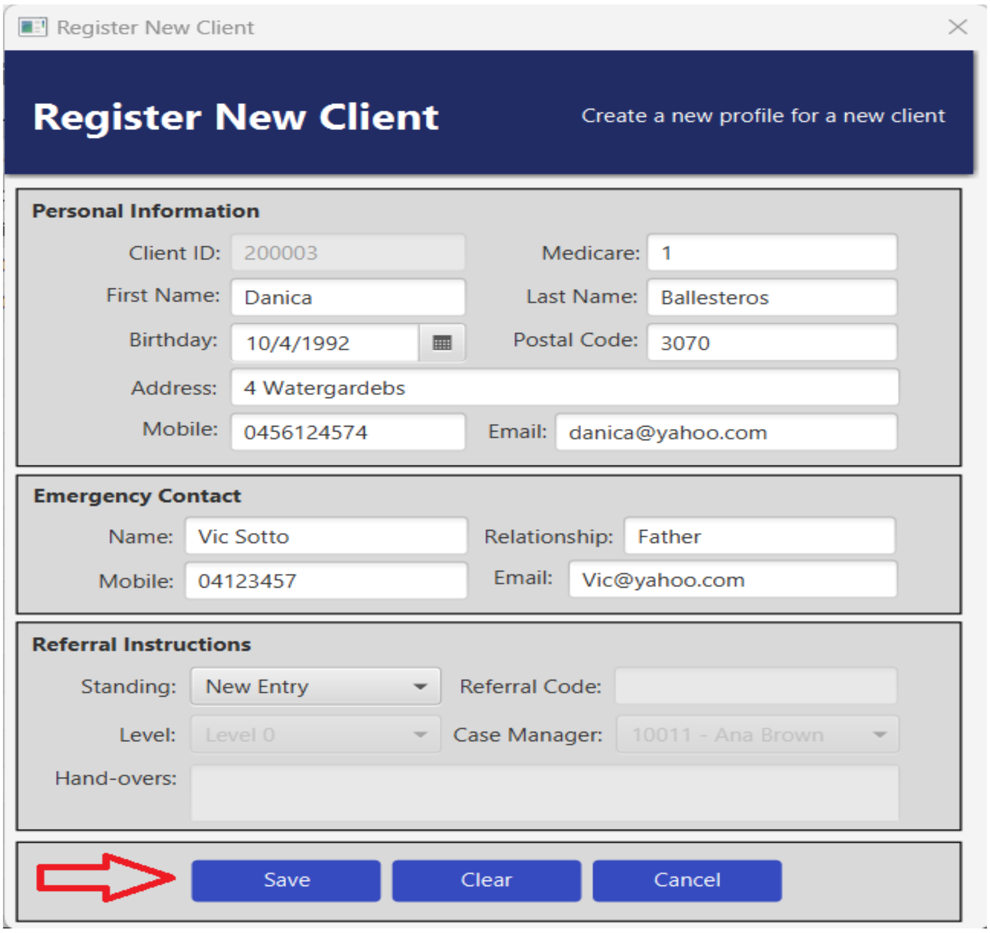
- **Enrol New Client**
    1. To enrol a new client, click on the New Client menu, a new window will open to register a new client.

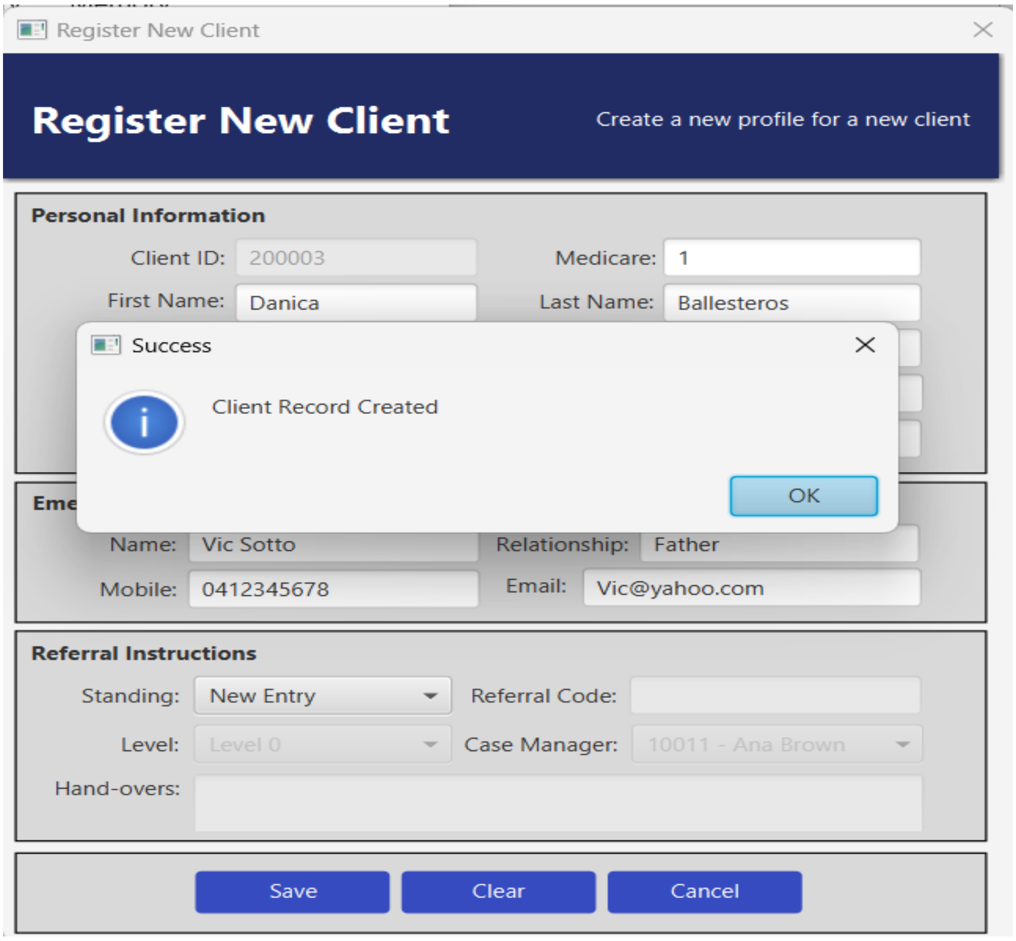


Fill in all the required fields and follow on screen validation.

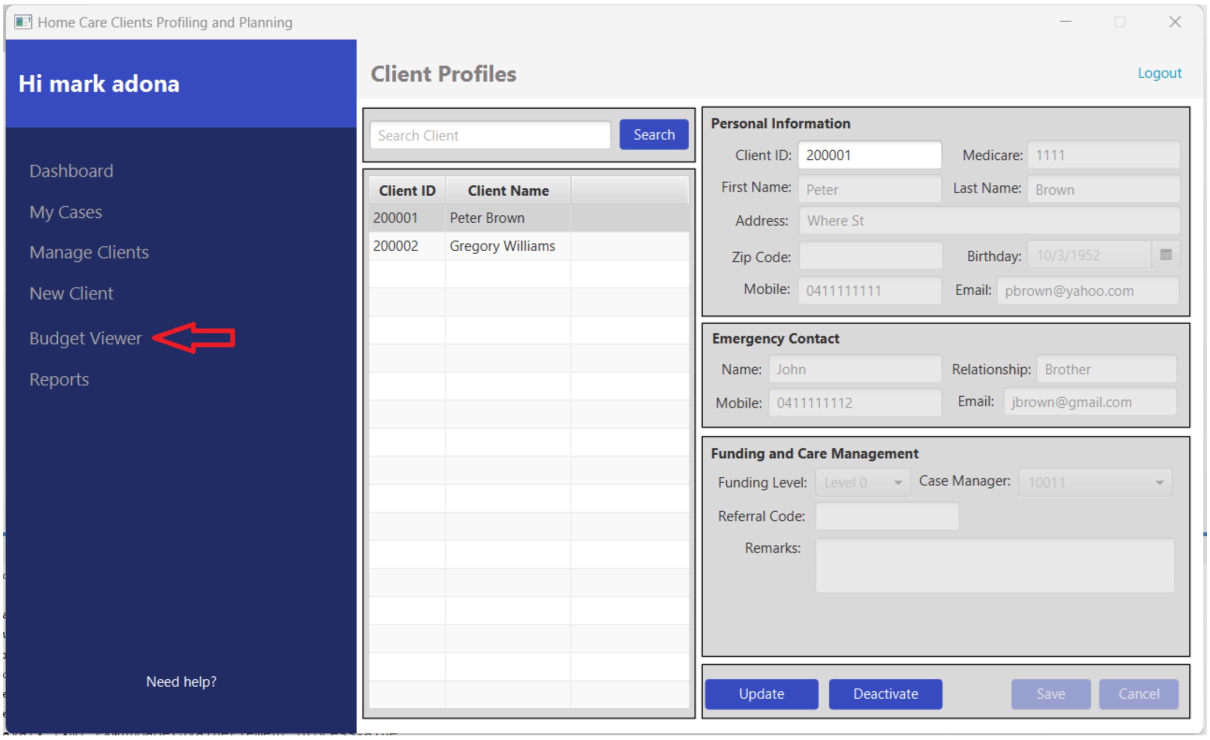


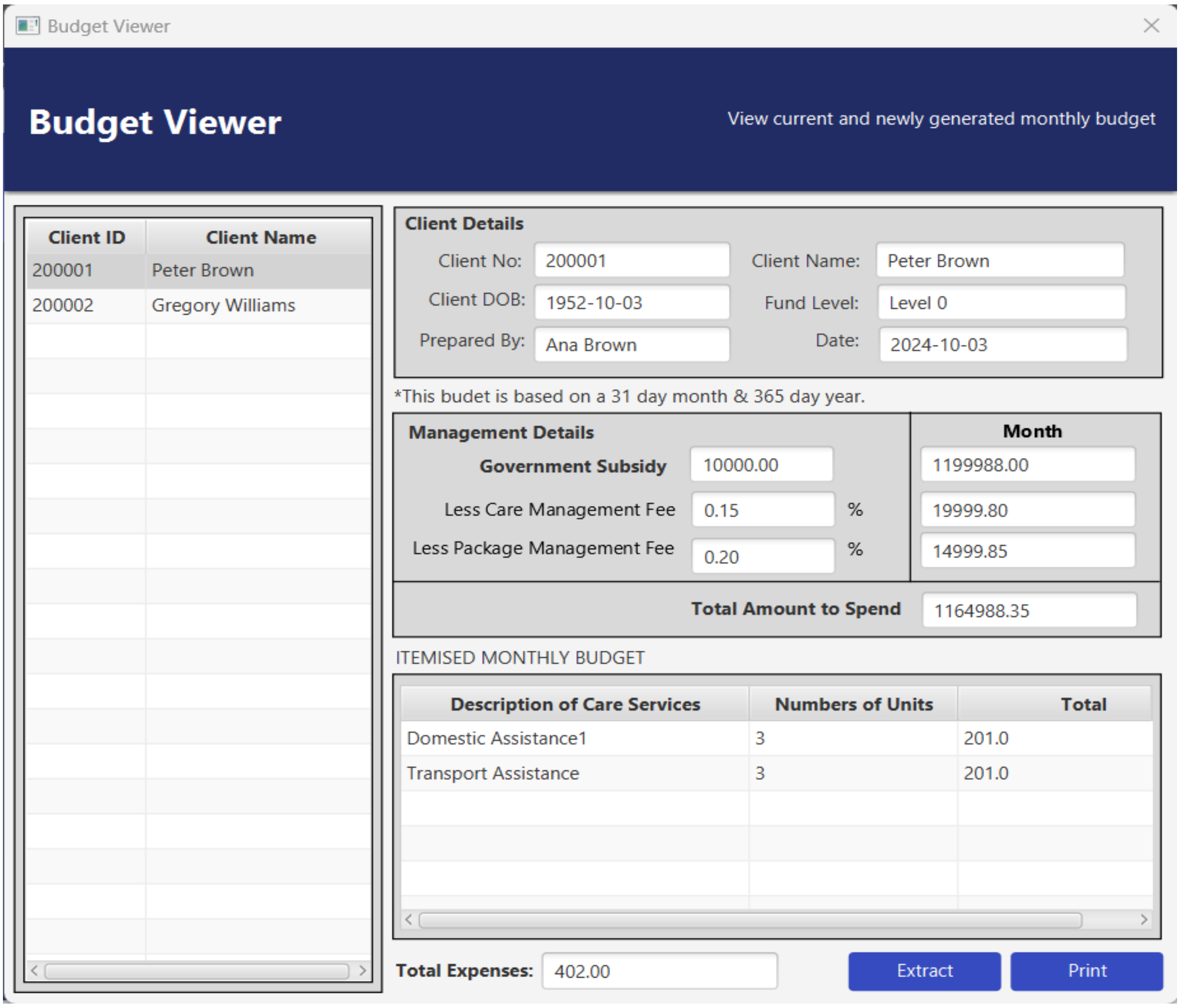
2. Once complete, click on save and a confirmation will pop



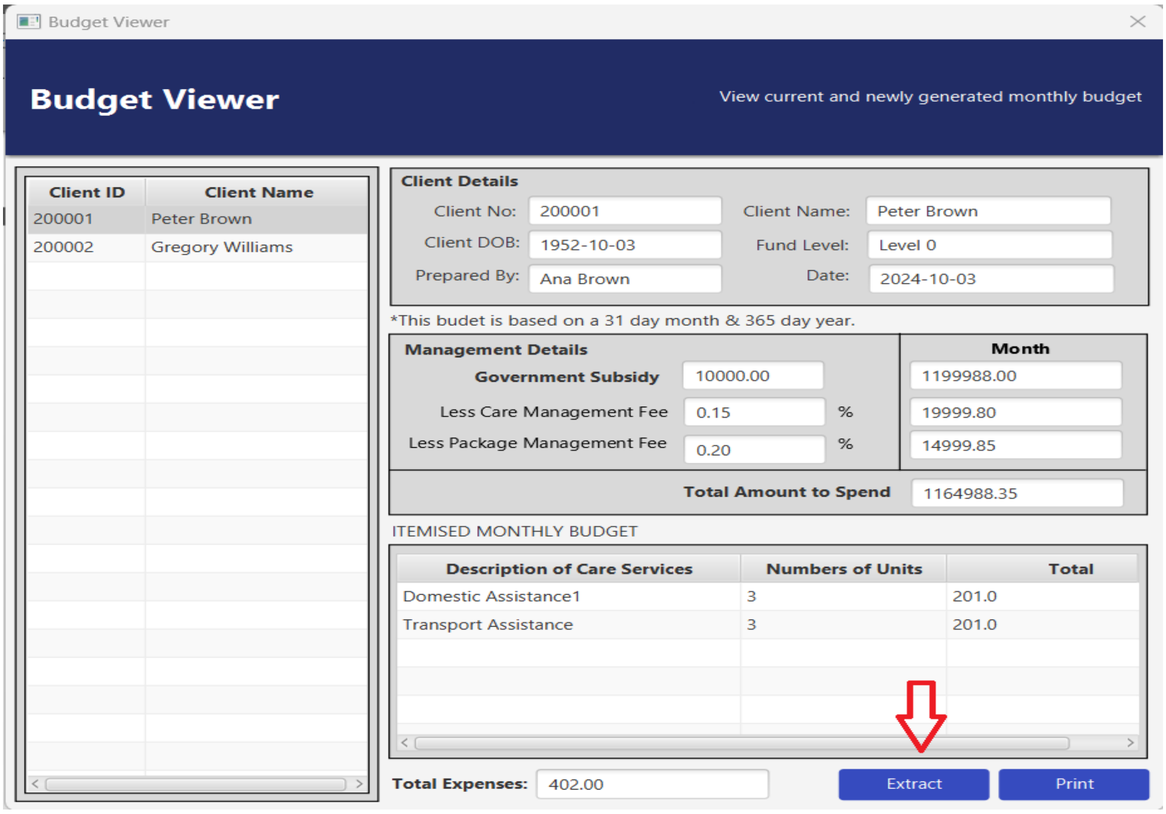


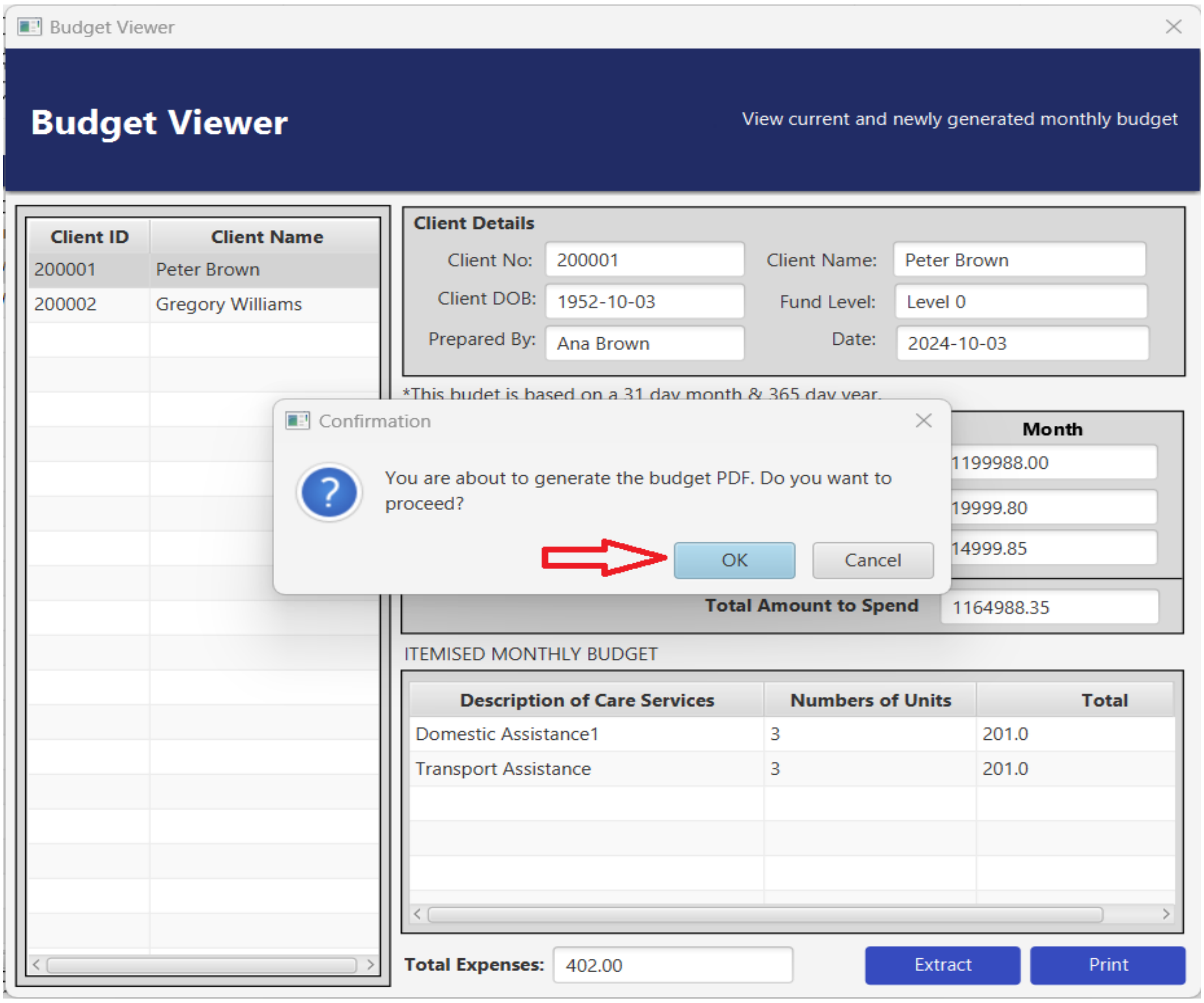
- **Budget Viewing**
    1. To view the client budget, navigate to the Budget Viewing by clicking it on the side menu. This will open a new window. Select a client the view the corresponding budget.

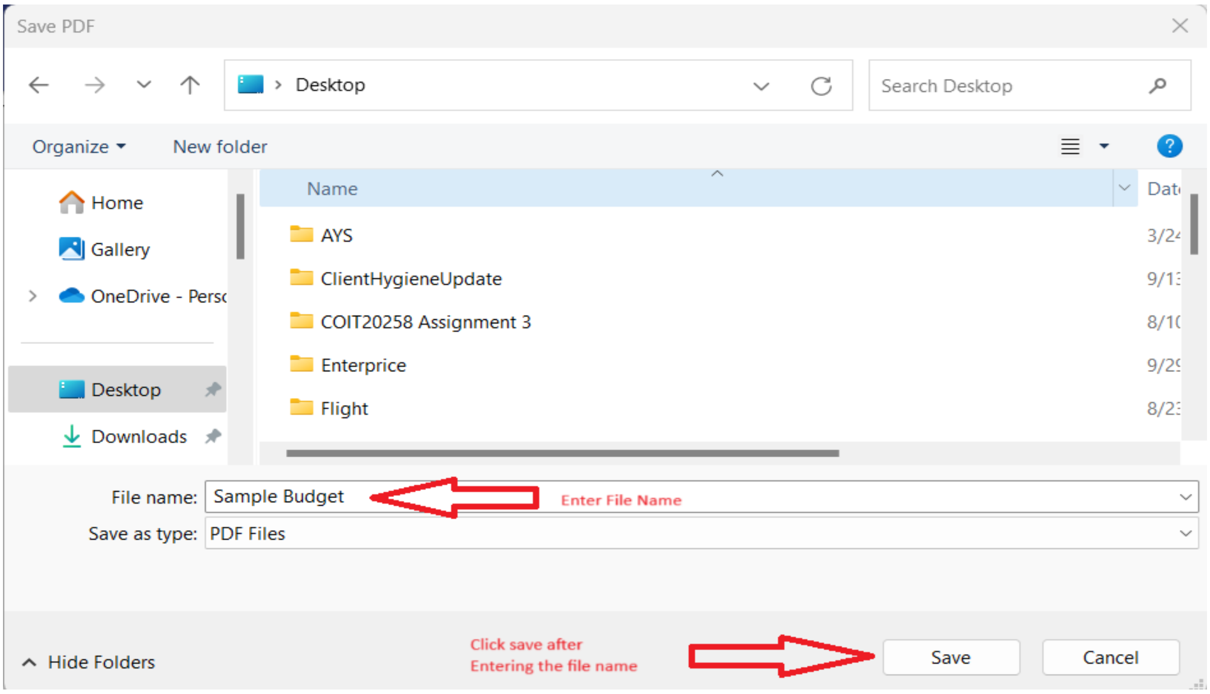


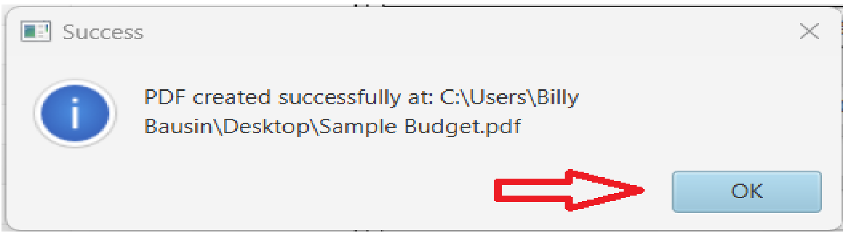


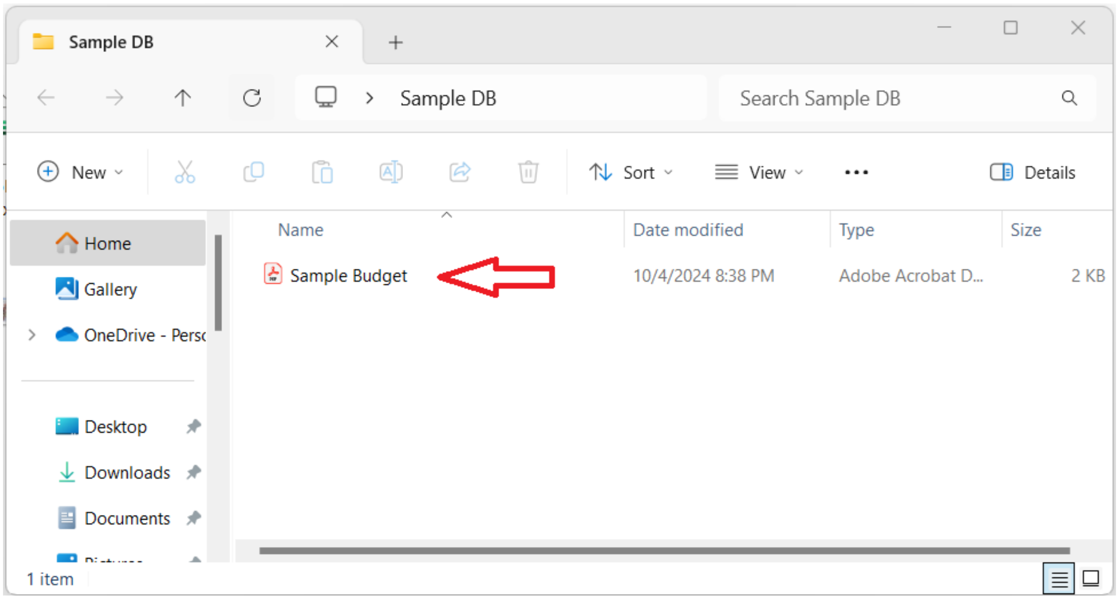
2. To extract the budget to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)

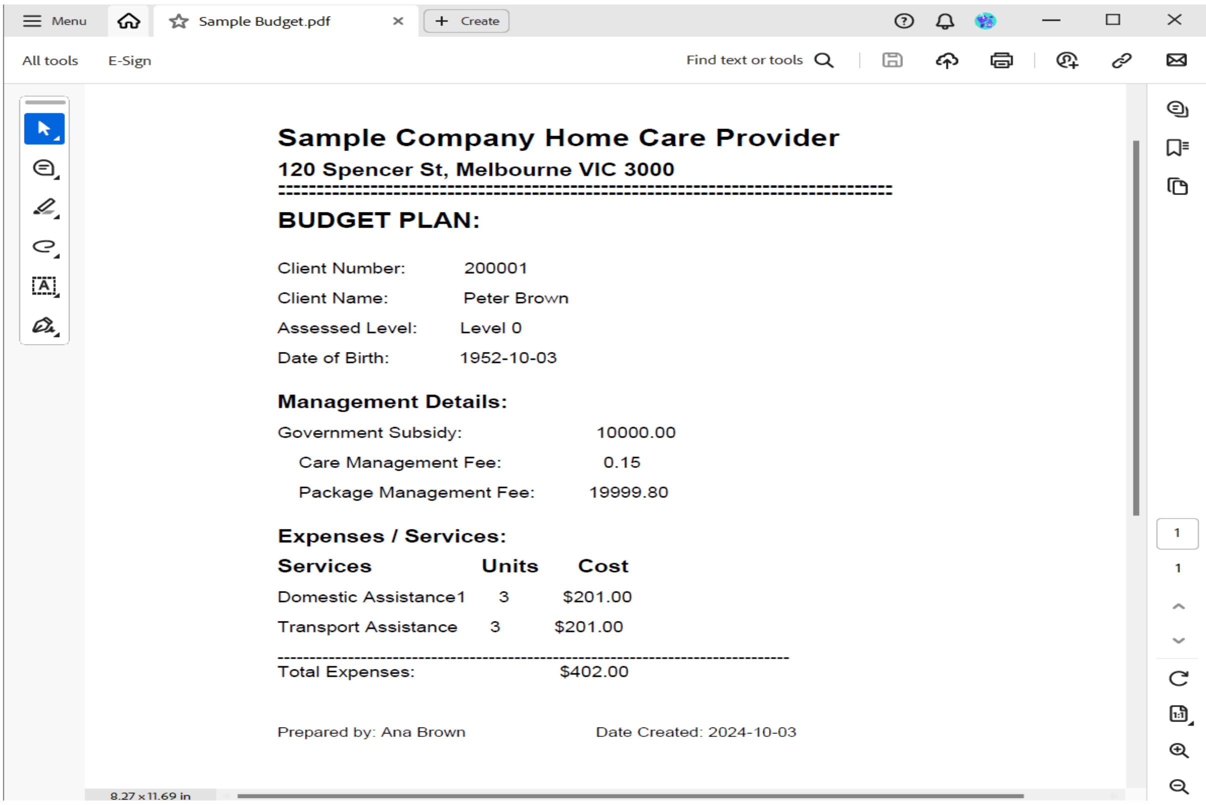

Budget Viewer
Budget Viewer
View current and newly generated monthly budget
Client ID
Client Name
200001
Peter Brown
200002
Gregory Williams
Client Details
Client No: 200001
Client Name: Peter Brown
Client DOB: 1952-10-03
Fund Level: Level 0
Prepared By: Ana Brown
Date: 2024-10-03
*This budet is based 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


Budget Viewer
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 budet 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

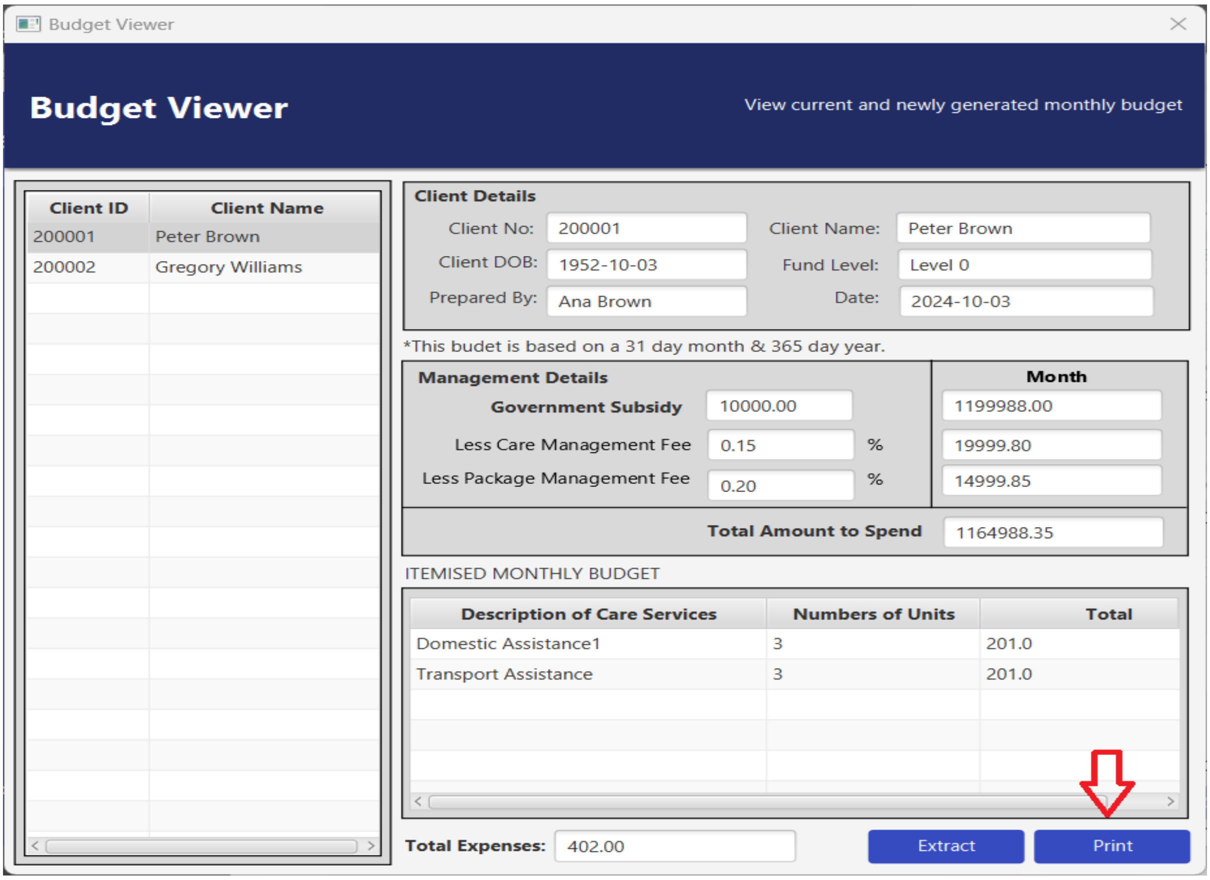

Save PDF
Desktop
Search Desktop
Organize
New folder
Name
Home
Gallery
OneDrive - Perso
Desktop
Downloads
AYS
ClientHygieneUpdate
COIT20258 Assignment 3
Enterprice
Flight
File name:
Sample Budget
Enter File Name
Save as type:
PDF Files
Hide Folders
Click save after
Entering the file name
Save
Cancel

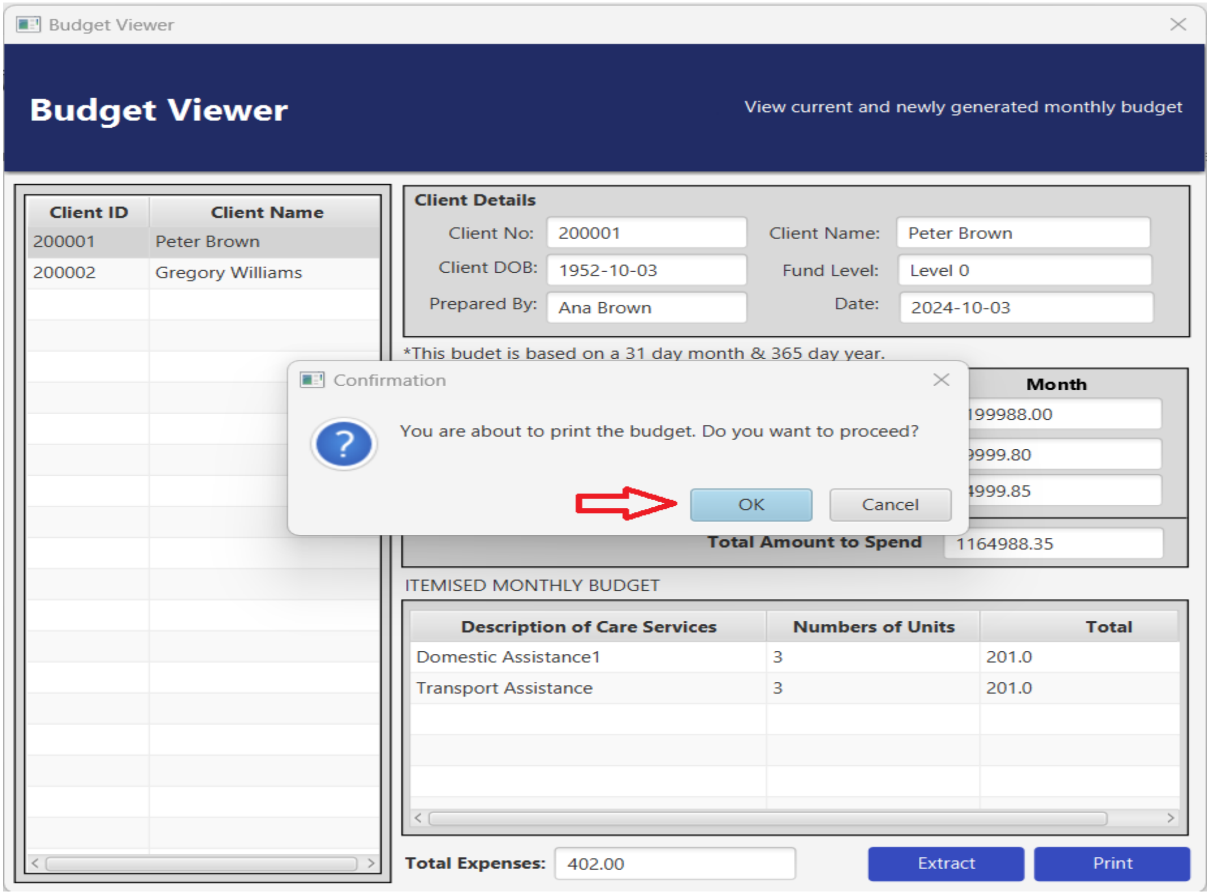

Success
PDF created successfully at: C:\Users\Billy
Bausin\Desktop\Sample Budget.pdf
OK

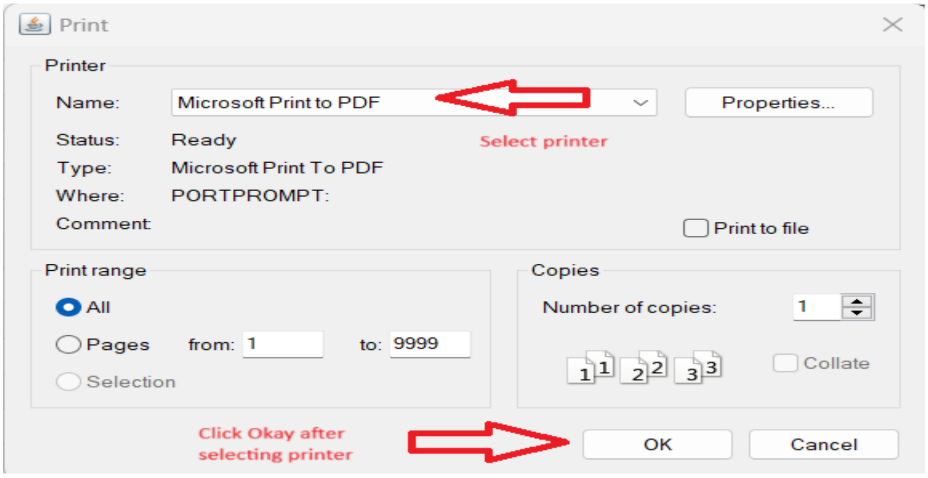

Sample DB
Sample DB
Search Sample DB
New
Sort
View
Details
Home
Gallery
OneDrive - Perso
Desktop
Downloads
Documents
Name
Date modified
Type
Size
Sample Budget
10/4/2024 8:38 PM
Adobe Acrobat D...
2 KB
1 item



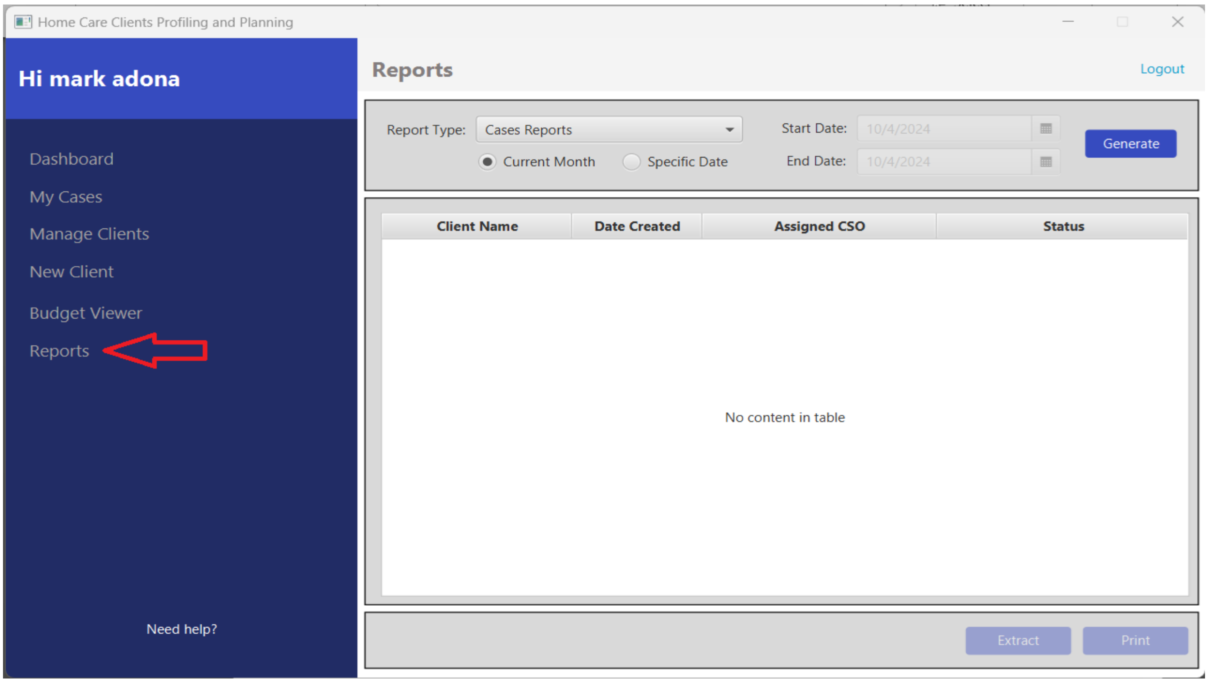
3. To print the budget, click on the print button and follow the on-screen print instructions.

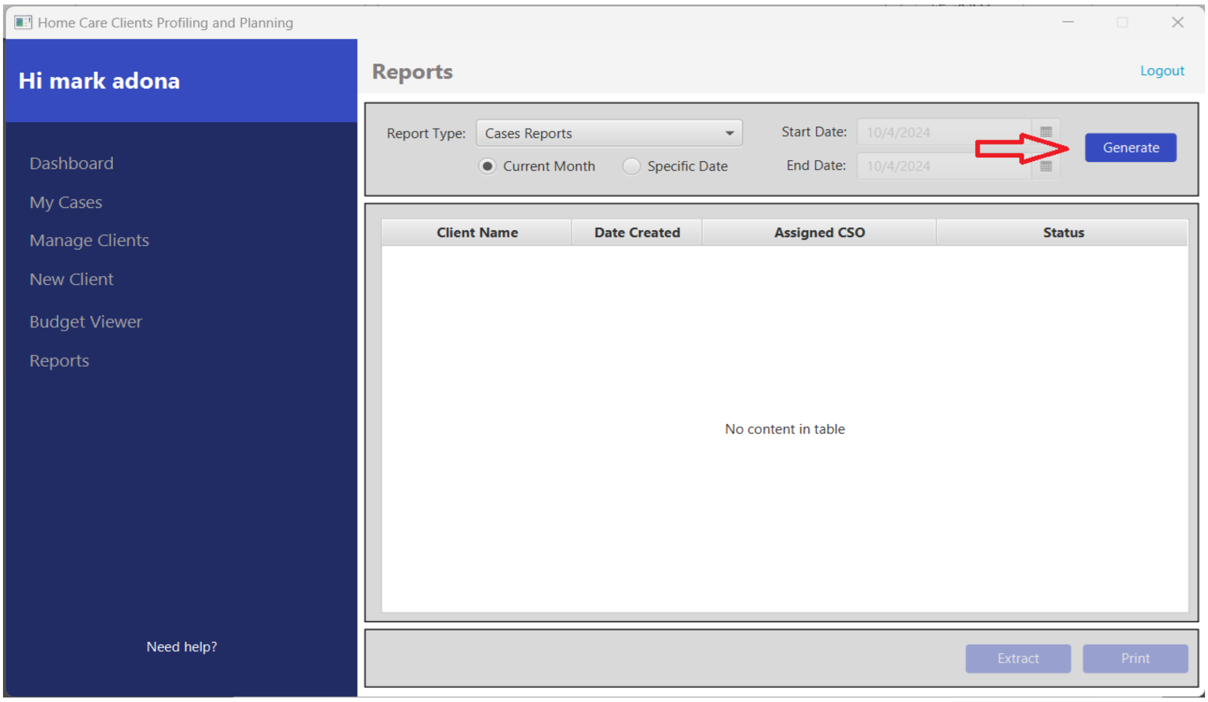


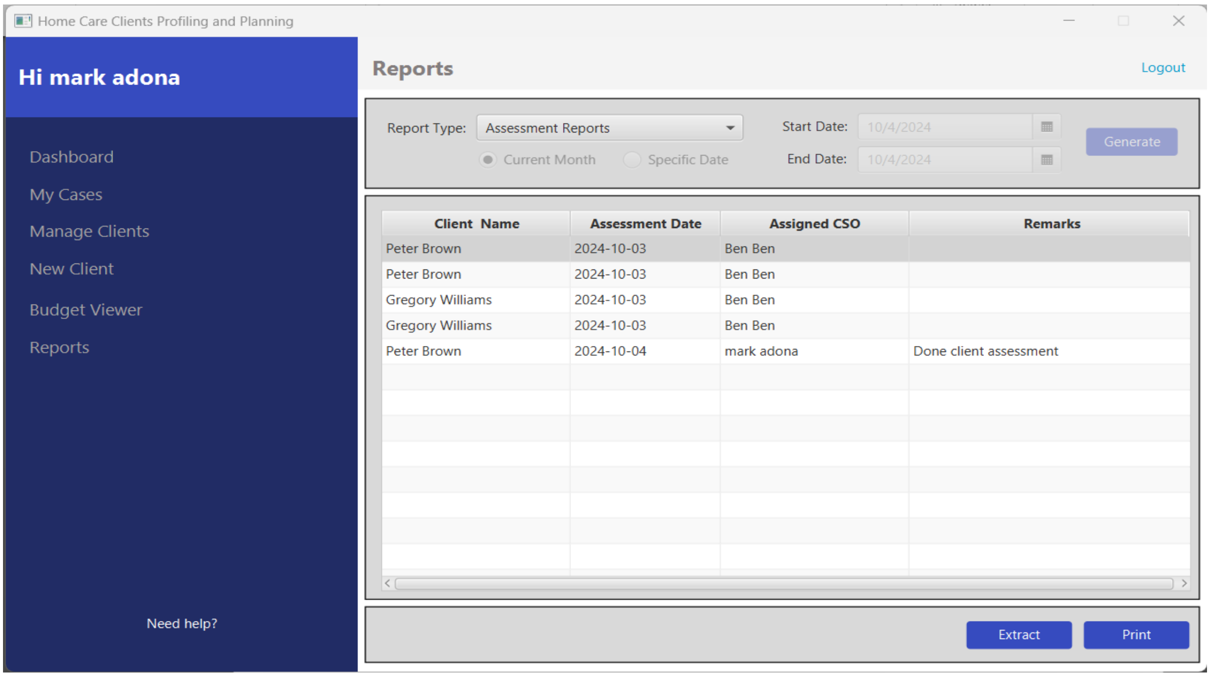




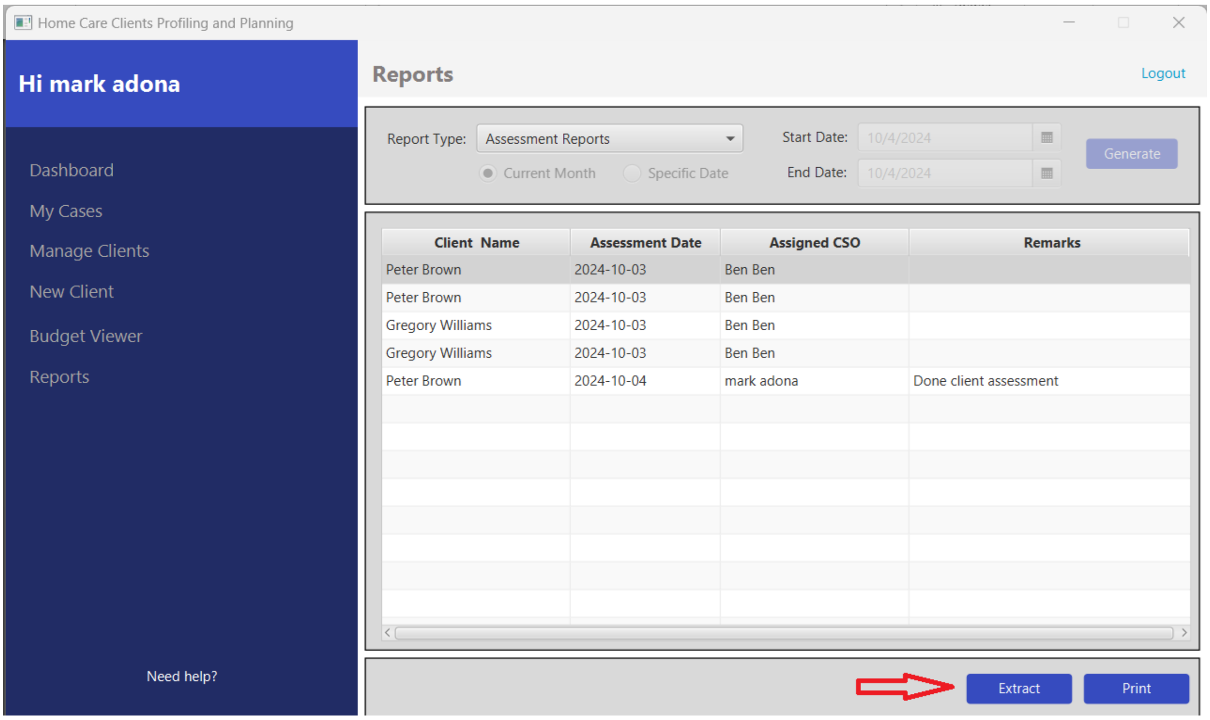
- **Reports Generation**
    1. To generate a report, click on the Reports on the left side panel menu and select which type of report that is intended to generate then click on generate. Options for custom reports is also available depending on the report type.

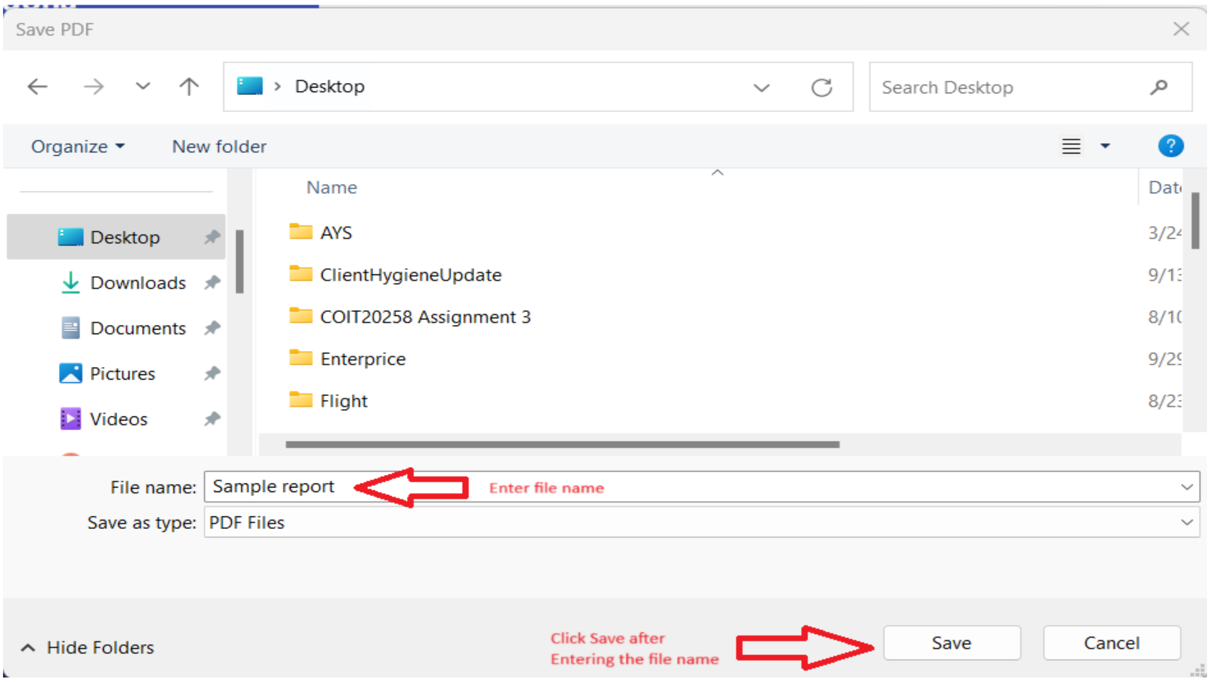

Home Care Clients Profiling and Planning
Hi mark adona
Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?
Reports
Logout
Report Type:
Cases Reports
Current Month
Specific Date
Start Date:
10/4/2024
End Date:
10/4/2024
Generate
Client Name
Date Created
Assigned CSO
Status
No content in table
Extract
Print

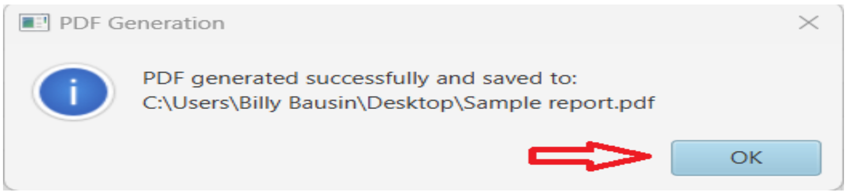

Home Care Clients Profiling and Planning
Hi mark adona
Dashboard
My Cases
Manage Clients
New Client
Budget Viewer
Reports
Need help?
Reports
Logout
Report Type:
Cases Reports
Current Month
Specific Date
Start Date:
10/4/2024
End Date:
10/4/2024
Generate
Client Name
Date Created
Assigned CSO
Status
No content in table
Extract
Print

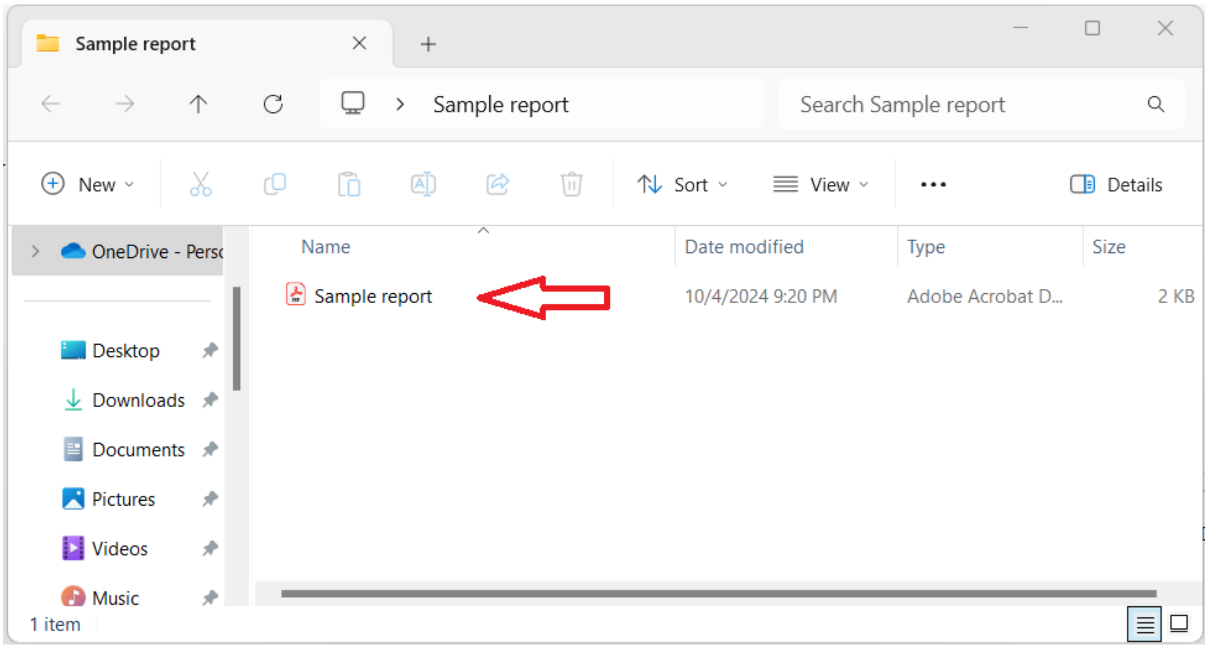


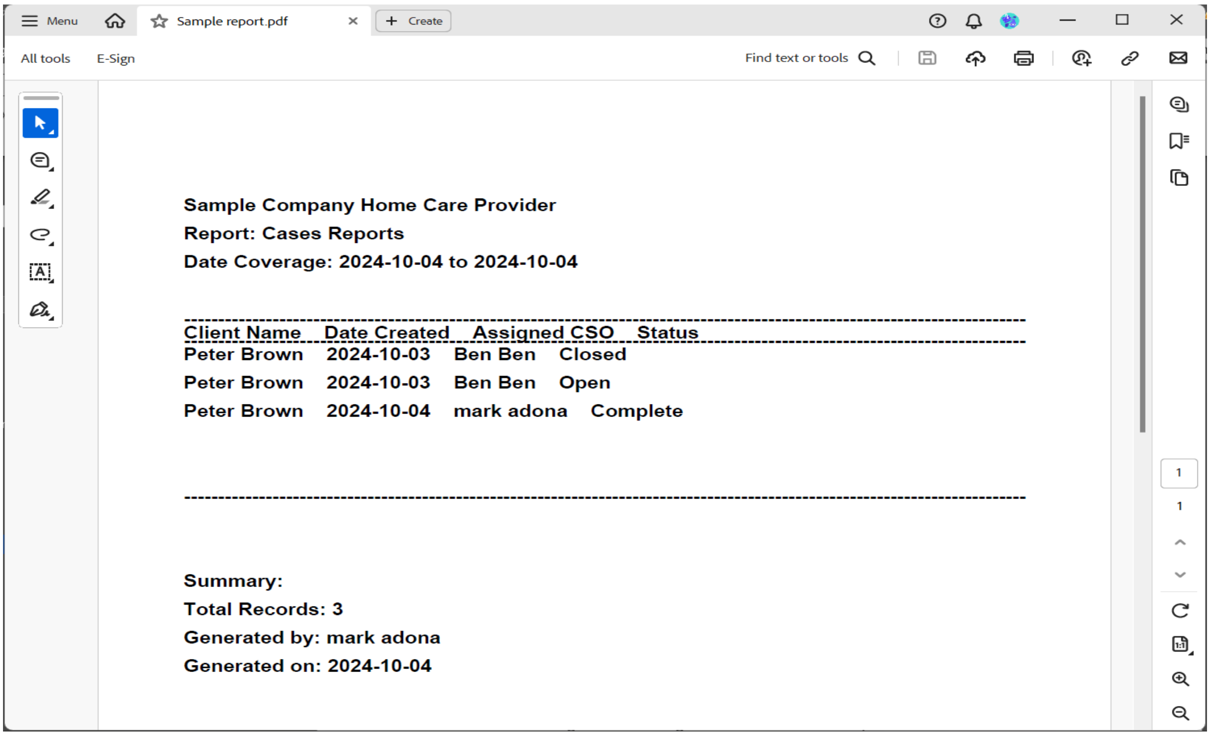
2. To extract the report to PDF, click on extract button and follow the steps in the new window that will locate the file saving and to name the file. (Locate and name the file as intended)



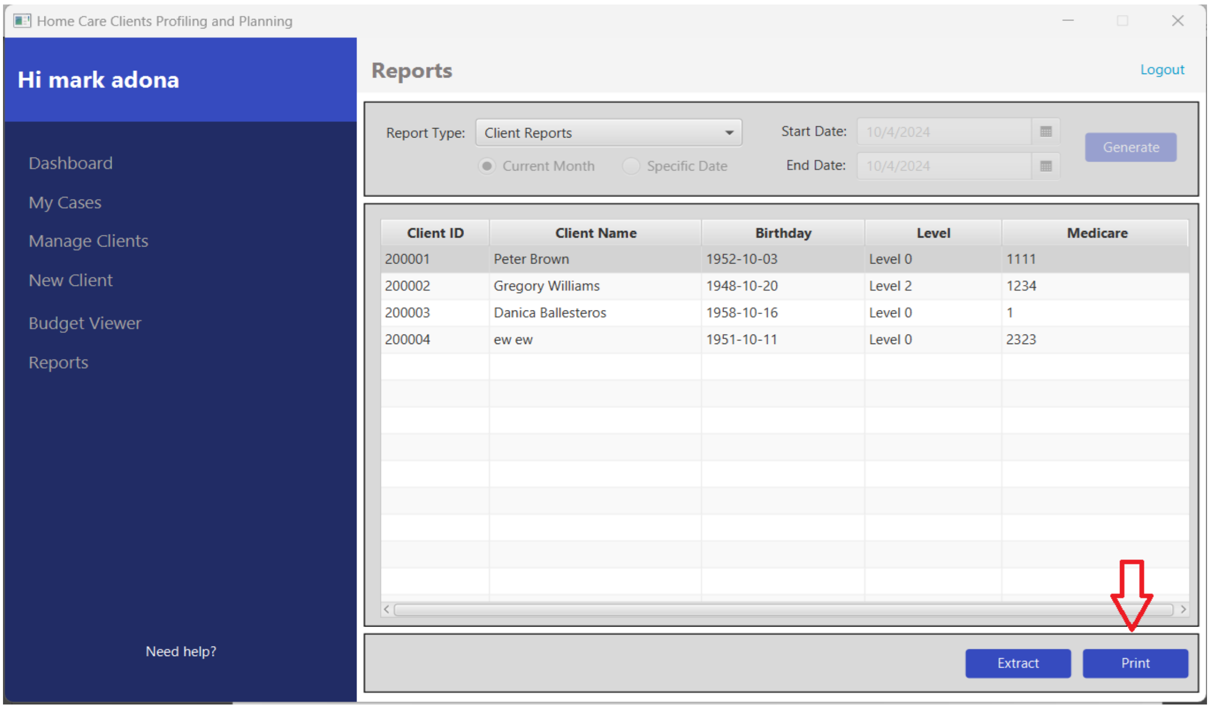

Save PDF
Desktop
Search Desktop
Organize
New folder
Name
Date
Desktop
Downloads
Documents
Pictures
Videos
AYS
ClientHygieneUpdate
COIT20258 Assignment 3
Enterprice
Flight
File name:
Sample report
Enter file name
Save as type:
PDF Files
Hide Folders
Click Save after
Entering the file name
Save
Cancel

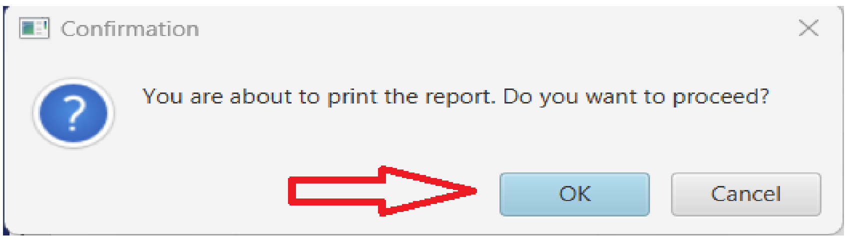

PDF Generation
PDF generated successfully and saved to:
C:\Users\Billy Bausin\Desktop\Sample report.pdf
OK

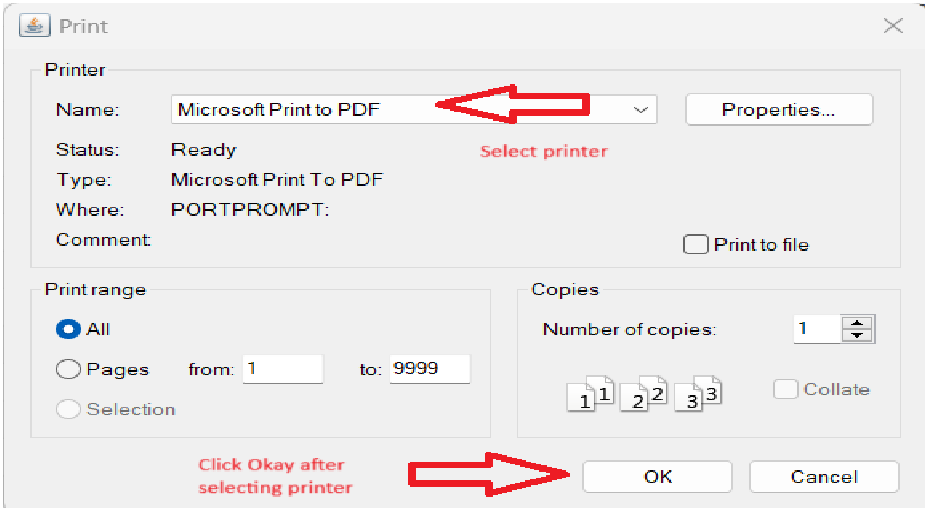

Sample report
Sample report
Search Sample report
New
Sort
View
Details
OneDrive - Pers
Name
Date modified
Type
Size
Sample report
10/4/2024 9:20 PM
Adobe Acrobat D...
2 KB
Desktop
Downloads
Documents
Pictures
Videos
Music
1 item



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

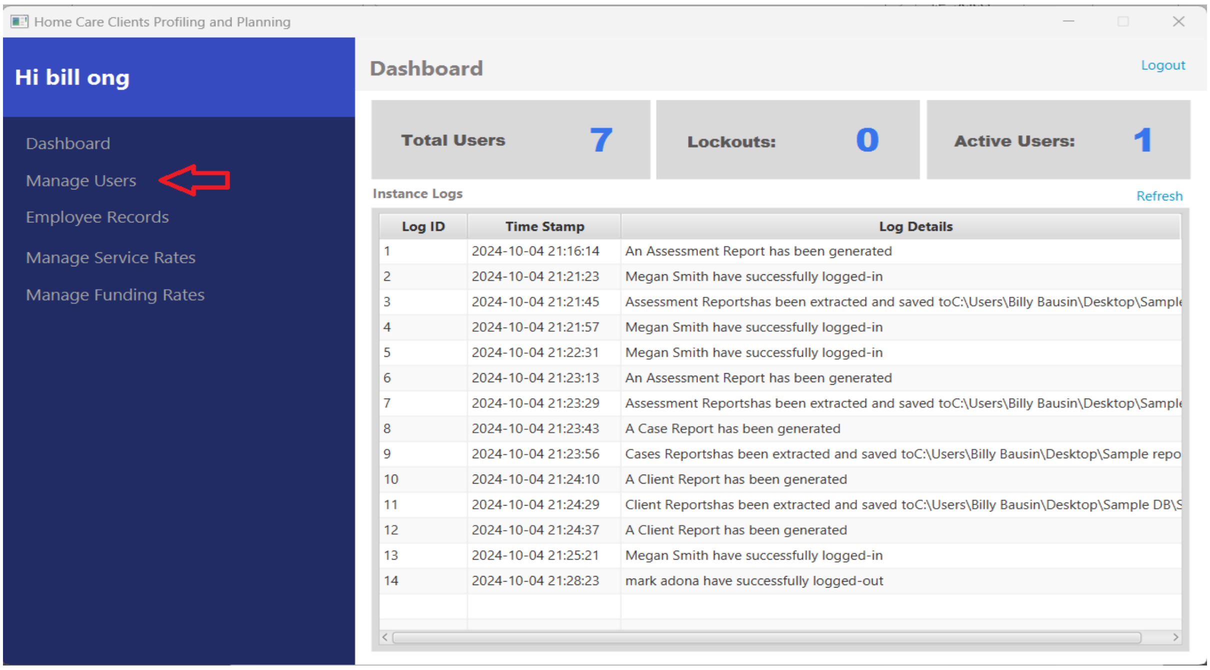


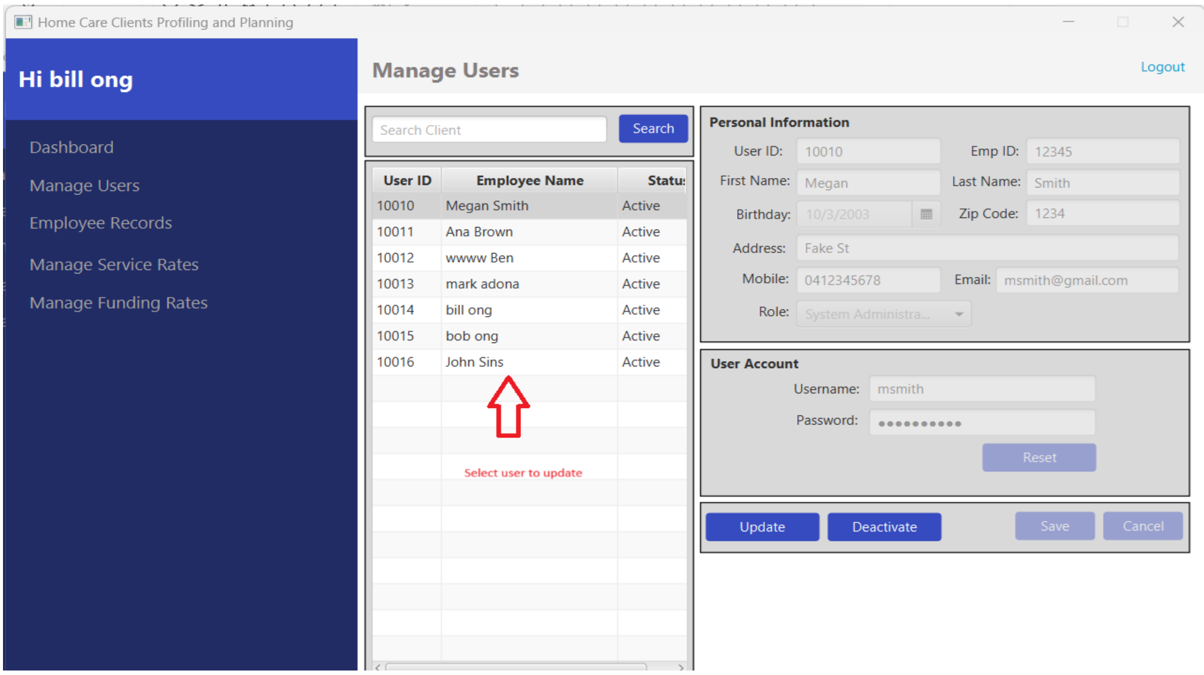


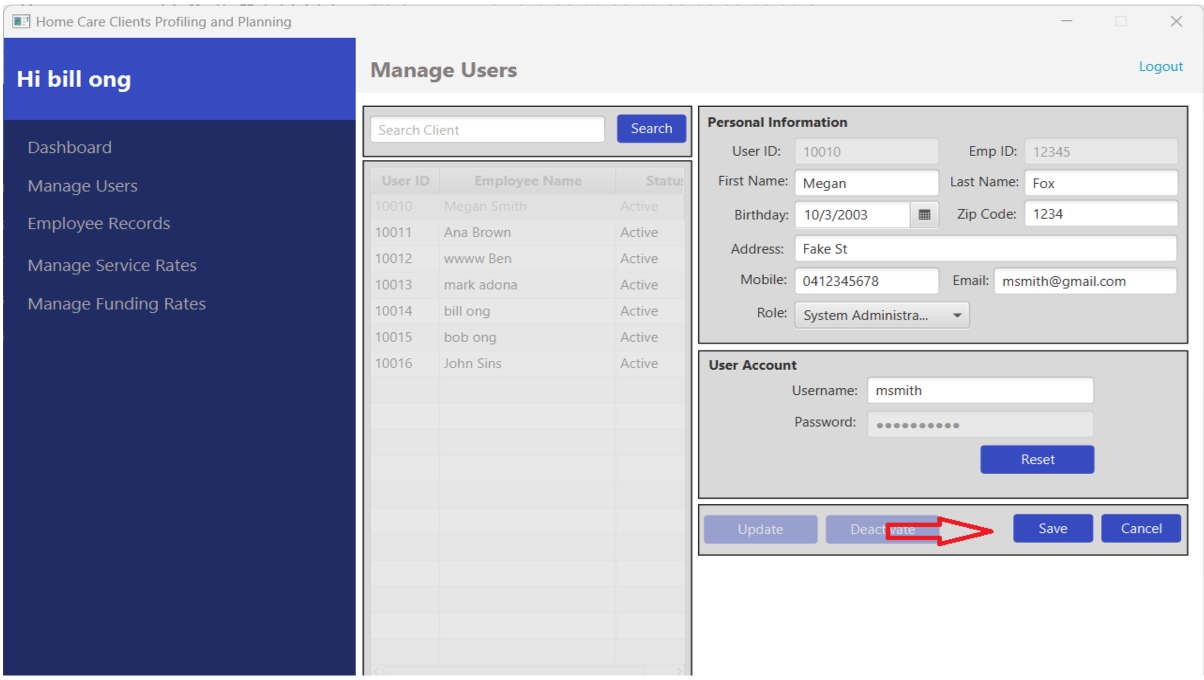


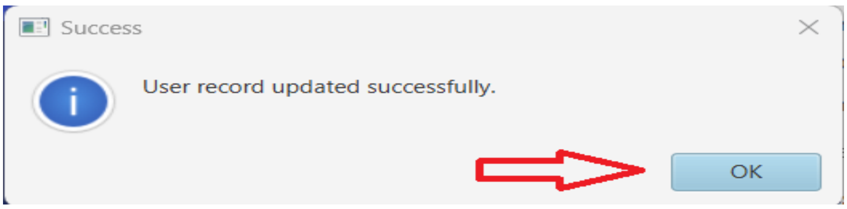
5.3 System Administrator

- **User Management**
  1. Navigate to Manage Users from the left panel menu 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

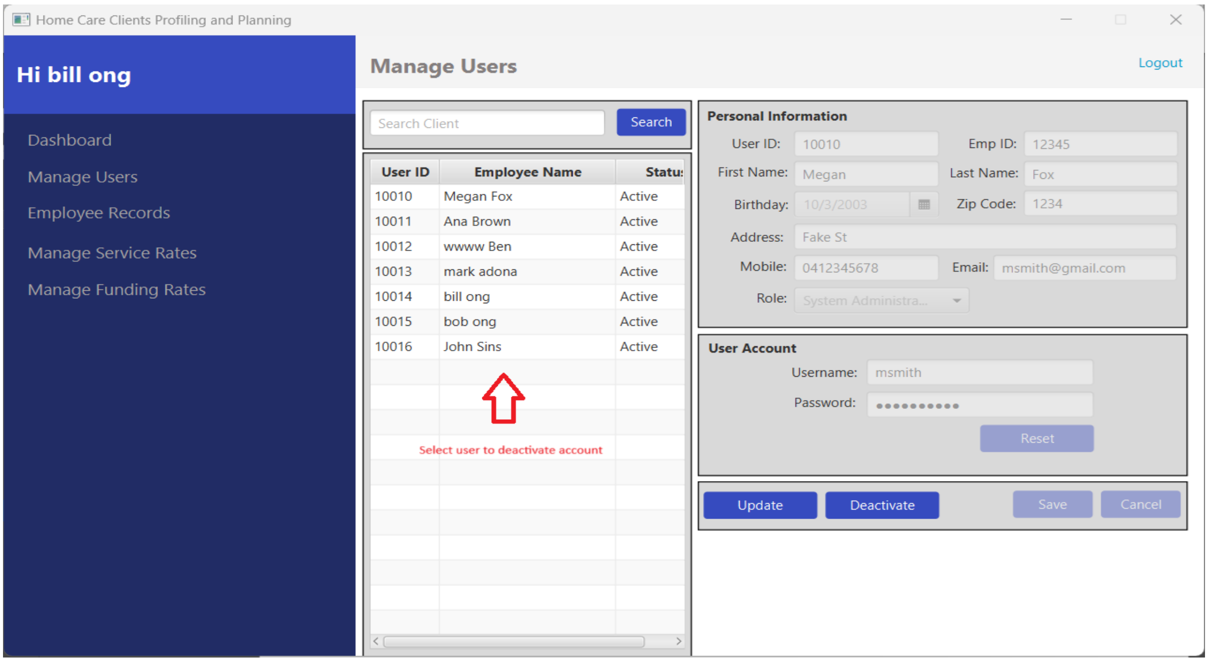


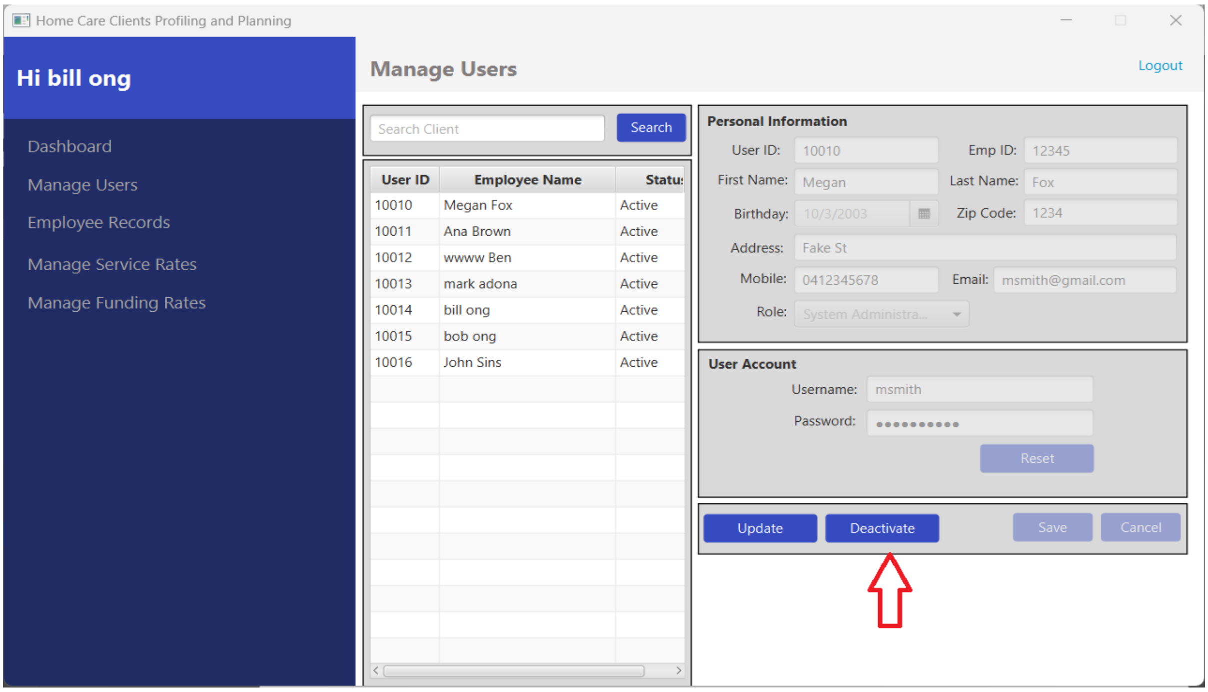


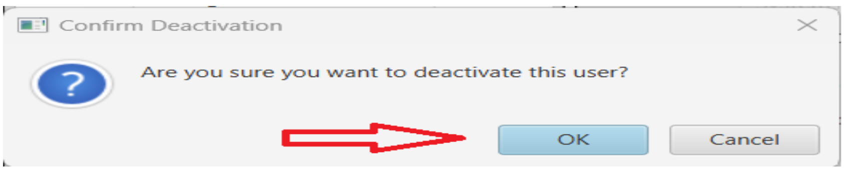


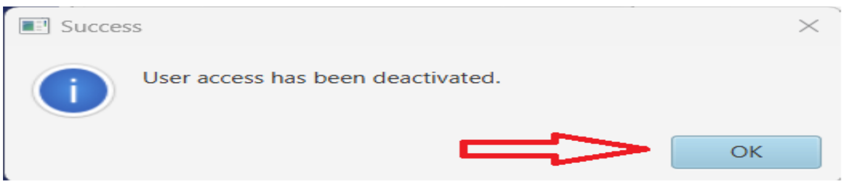


2. To deactivate an account, select from the user list the profile that you wish to deactivate then click the Deactivate Button. Follow the on-screen prompt to deactivate the user account.

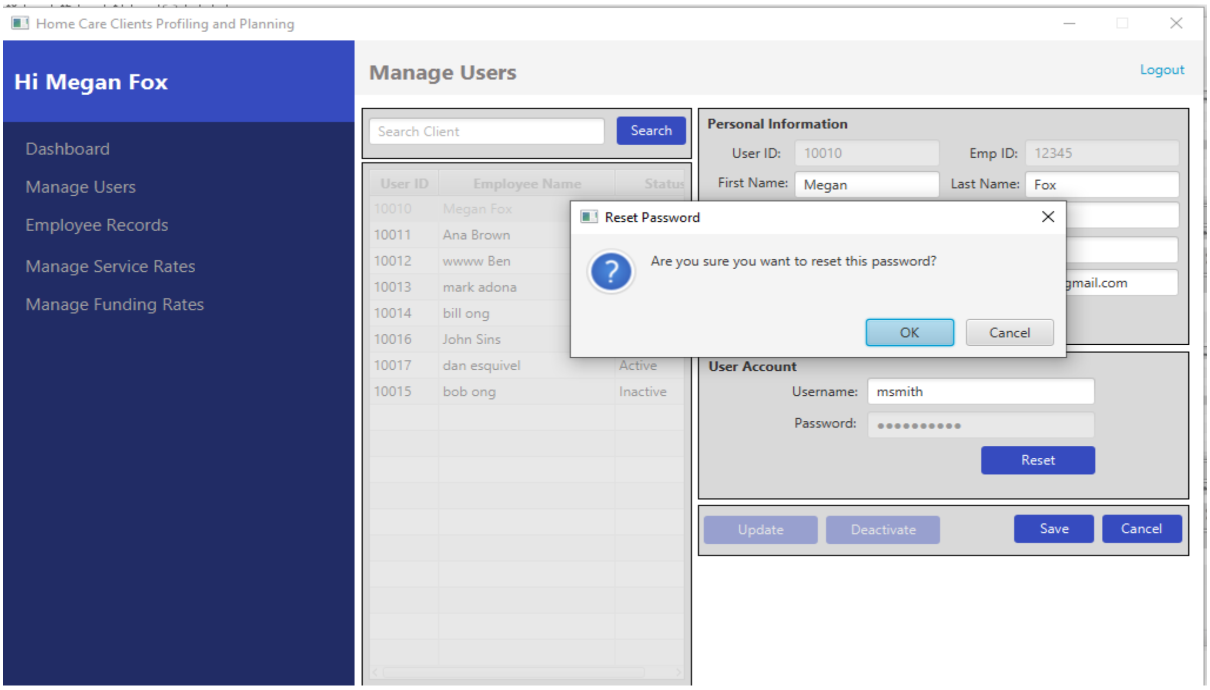

Home Care Clients Profiling and Planning
Hi bill ong
Manage Users
Logout
Dashboard
Manage Users
Employee Records
Manage Service Rates
Manage Funding Rates
Search Client
Search
User ID
Employee Name
Statu:
10010 Megan Fox Active
10011 Ana Brown Active
10012 wwww Ben Active
10013 mark adona Active
10014 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

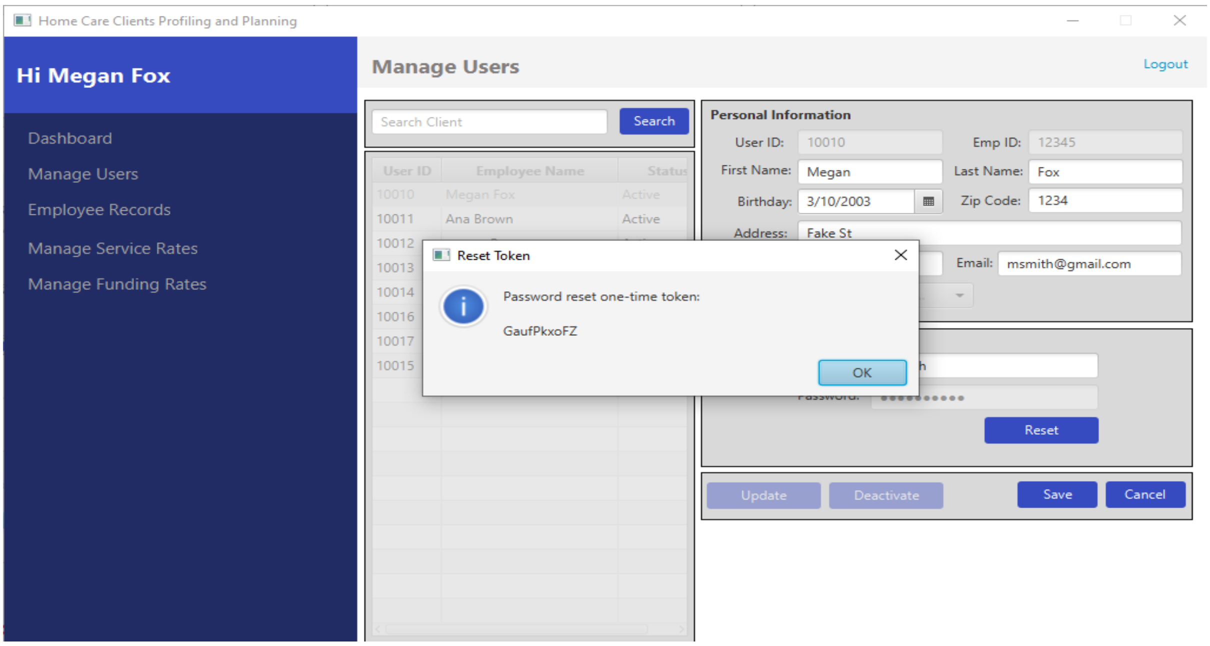

Home Care Clients Profiling and Planning
Hi bill ong
Manage Users
Logout
Dashboard
Manage Users
Employee Records
Manage Service Rates
Manage Funding Rates
Search Client
Search
User ID
Employee Name
Statu:
10010 Megan Fox Active
10011 Ana Brown Active
10012 wwww Ben Active
10013 mark adona Active
10014 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


Confirm Deactivation
Are you sure you want to deactivate this user?
OK
Cancel

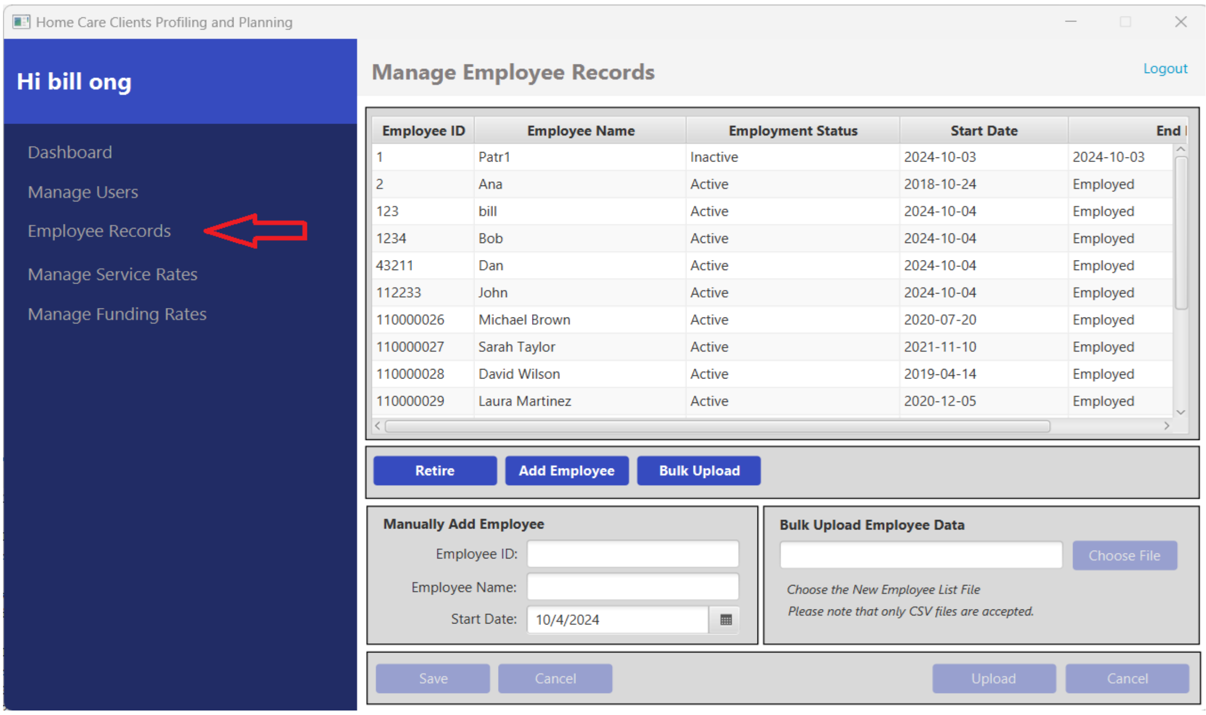

Success
User access has been deactivated.
OK

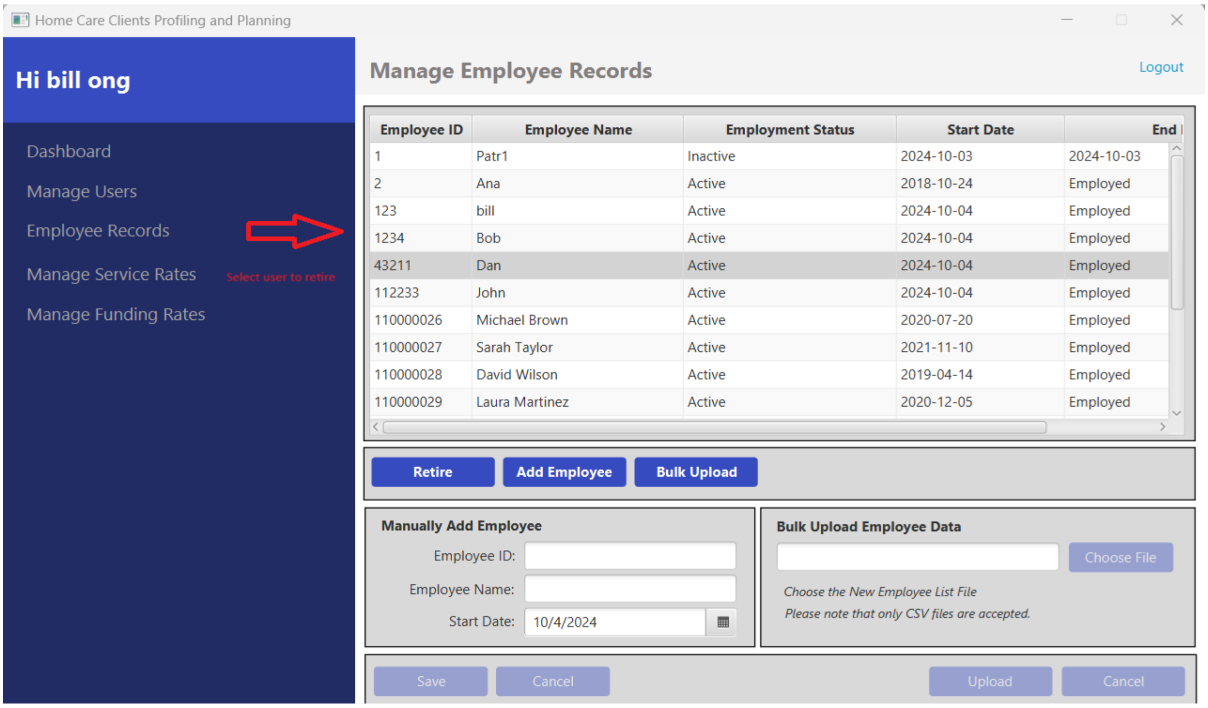
3. To reset the password, select from the user list the profile then click on Update button then click Reset Button. This will generate a onetime key which will be used by the user to change their password.

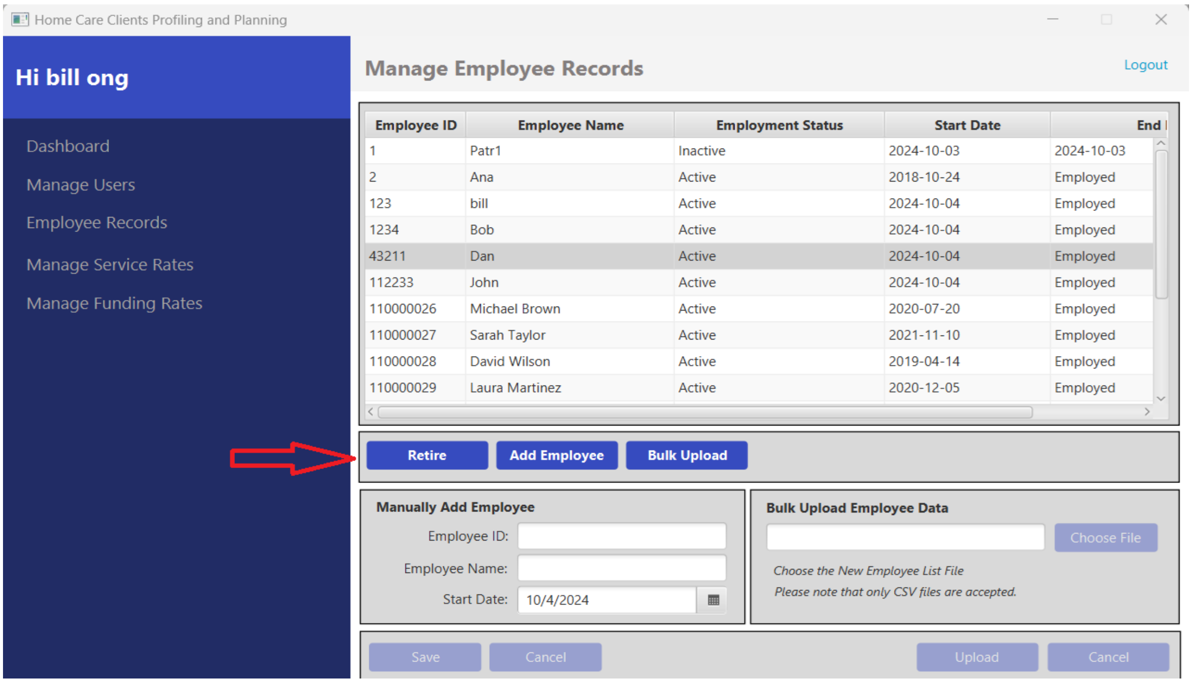


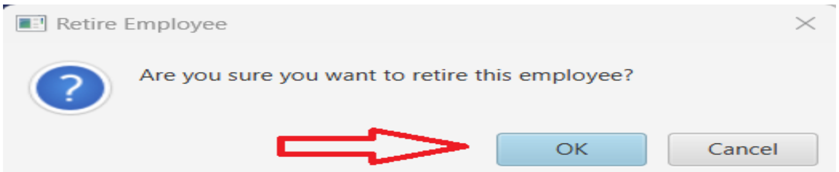


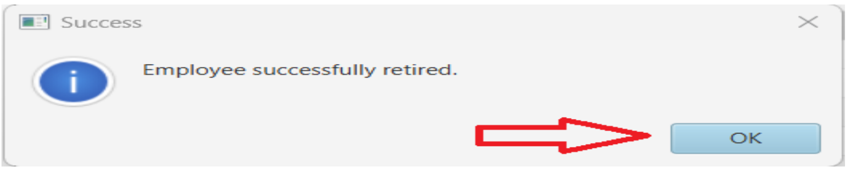
- **Employee Management**
  1. To retire an employee on record, click on the Employee Record on the left panel menu. Select an employee from the list and click on retire. Follow the on-screen prompts to confirm record retirement.


Home Care Clients Profiling and Planning
Hi bill ong
Manage Employee Records
Logout
Dashboard
Manage Users
Employee Records
Manage Service Rates
Manage Funding Rates
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: 10/4/2024
Bulk Upload Employee Data
Choose File
Choose the New Employee List File
Please note that only CSV files are accepted.
Save
Cancel
Upload
Cancel

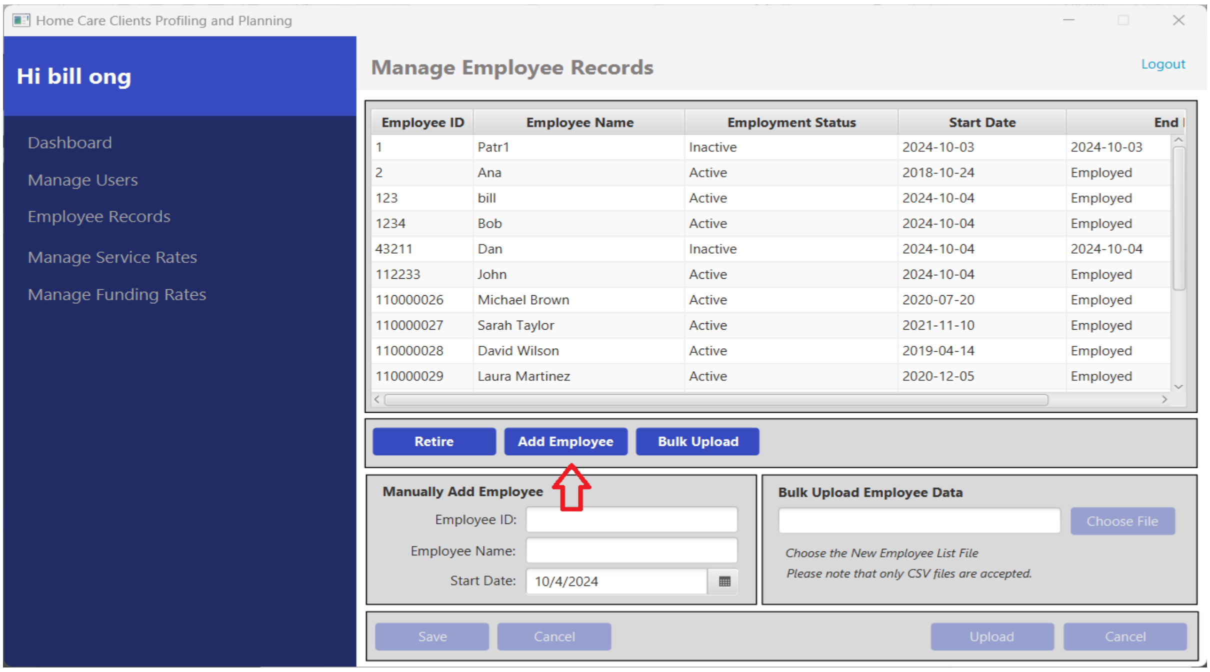

Home Care Clients Profiling and Planning
Hi bill ong
Manage Employee Records
Logout
Dashboard
Manage Users
Employee Records
Manage Service Rates
Select user to retire
Manage Funding Rates
Employee ID | Employee Name | Employment Status | Start Date | End
1 | Patr1 | Inactive | 2024-10-03 | 2024-10-03
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: 10/4/2024
Bulk Upload Employee Data
Choose File
Choose the New Employee List File
Please note that only CSV files are accepted.
Save
Cancel
Upload
Cancel

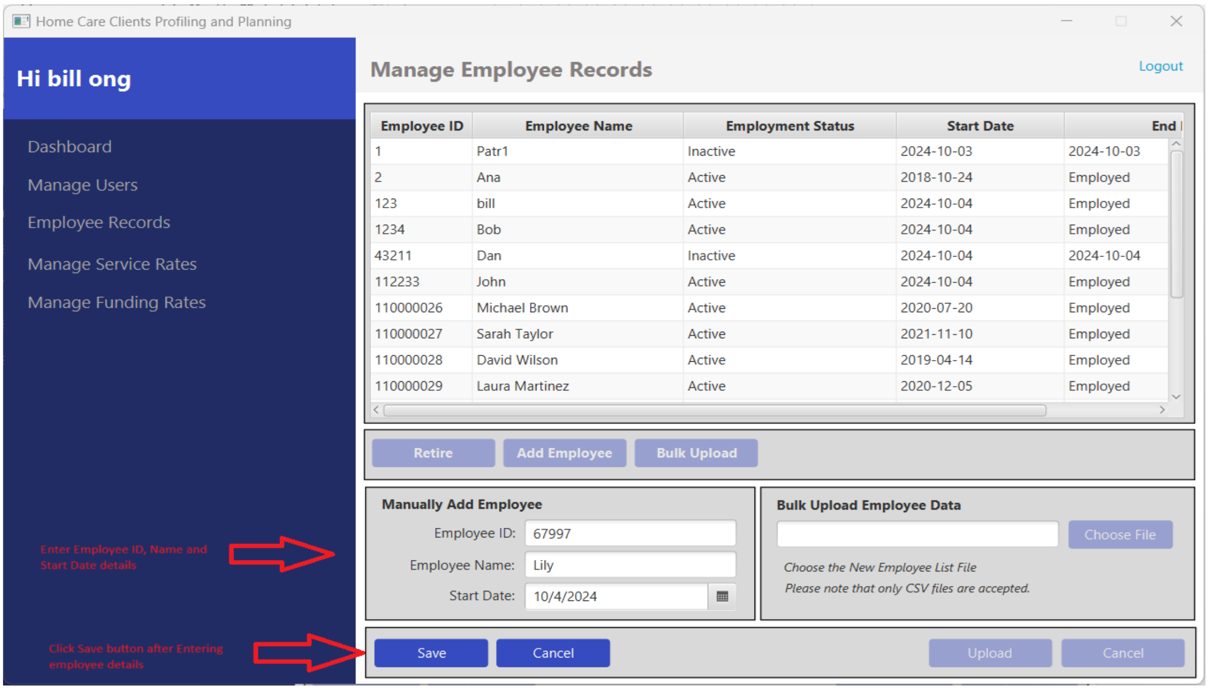

Home Care Clients Profiling and Planning
Hi bill ong
Manage Employee Records
Logout
Dashboard
Manage Users
Employee Records
Manage Service Rates
Manage Funding Rates
Employee ID
Employee Name
Employment Status
Start Date
End I
1 Patr1 Inactive 2024-10-03 2024-10-03
2 Ana Active 2018-10-24 Employed
123 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:
10/4/2024
Bulk Upload Employee Data
Choose File
Choose the New Employee List File
Please note that only CSV files are accepted.
Save
Cancel
Upload
Cancel

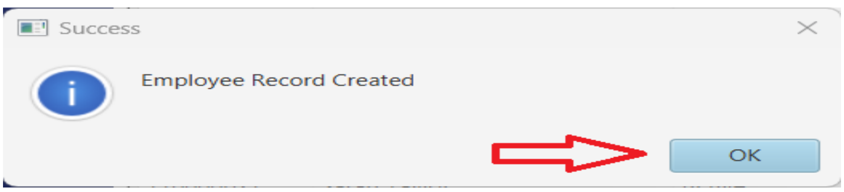

Retire Employee
Are you sure you want to retire this employee?
OK
Cancel


Success
Employee successfully retired.
OK

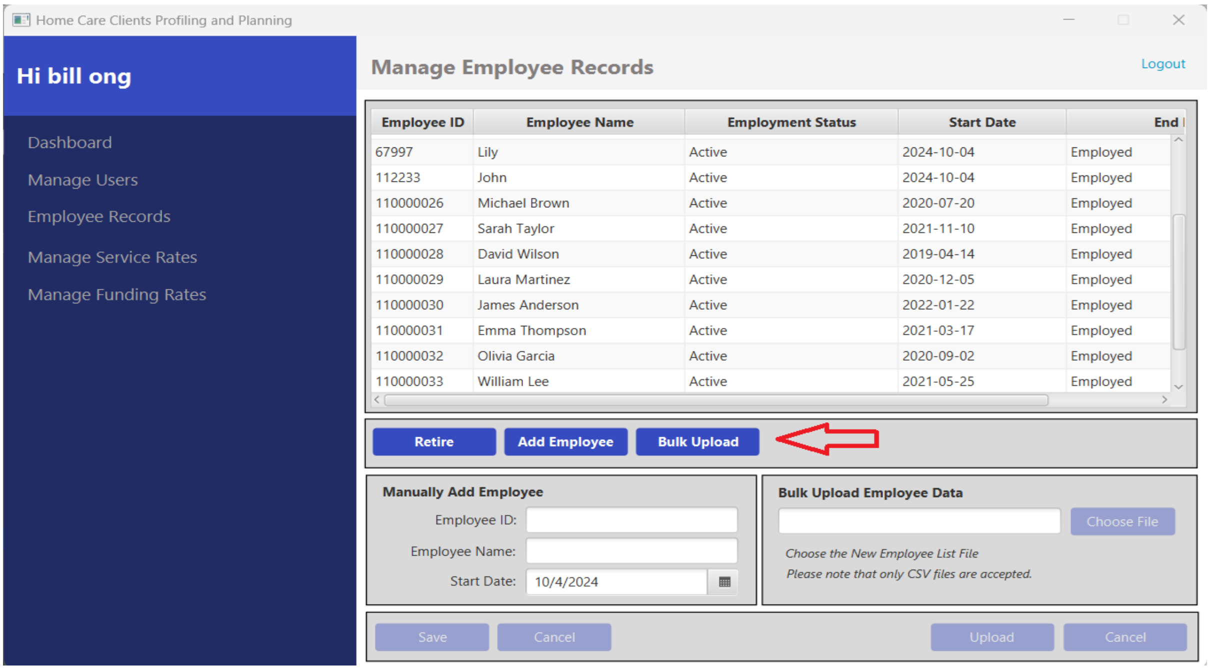
2. To manually add an employee on record, click on Add Employee. This will allow input of single employee on the record. click on Save to confirm record enrolment.

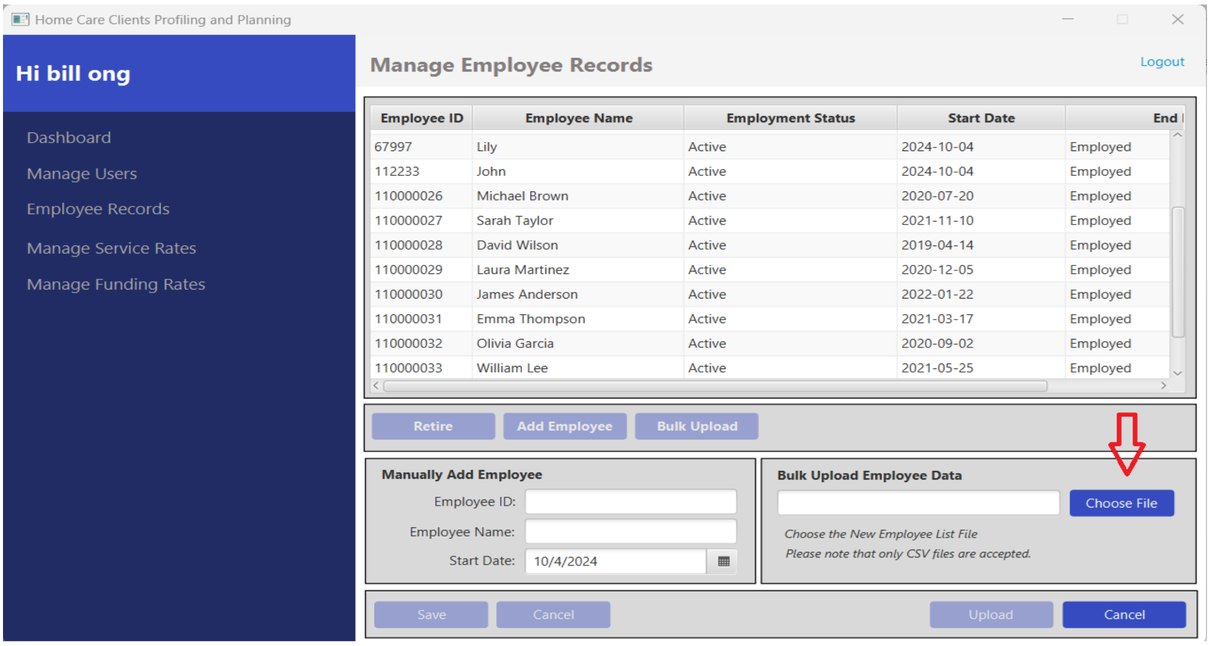


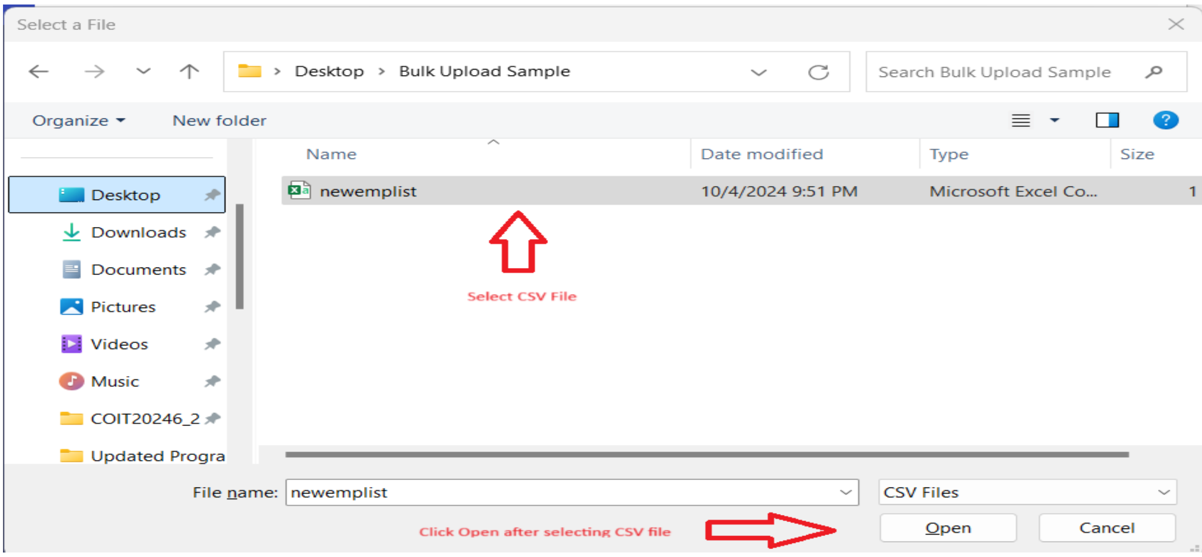


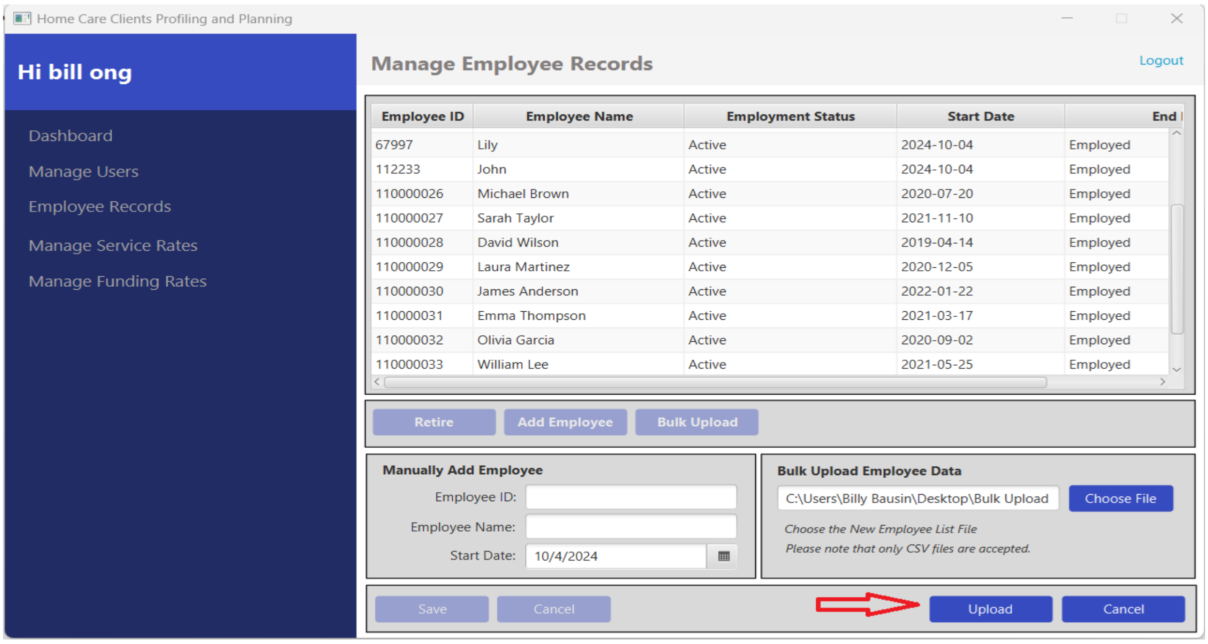


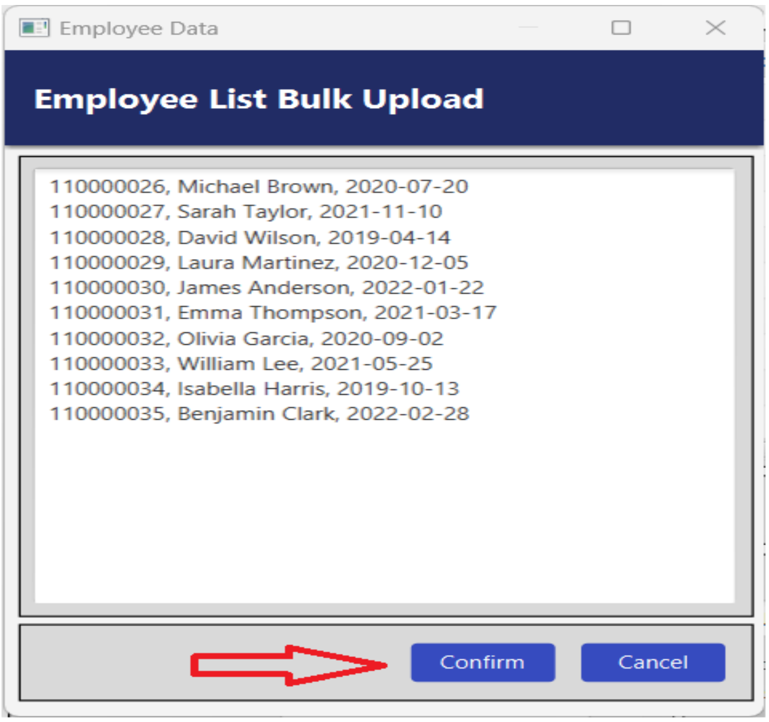
3. To import an alphalist, click on the Bulk Upload Button, this will allow uploading of a CSV file that contains employee record. Follow the on-screen instructions of choosing a file then click on upload. Confirm the data from the new window.



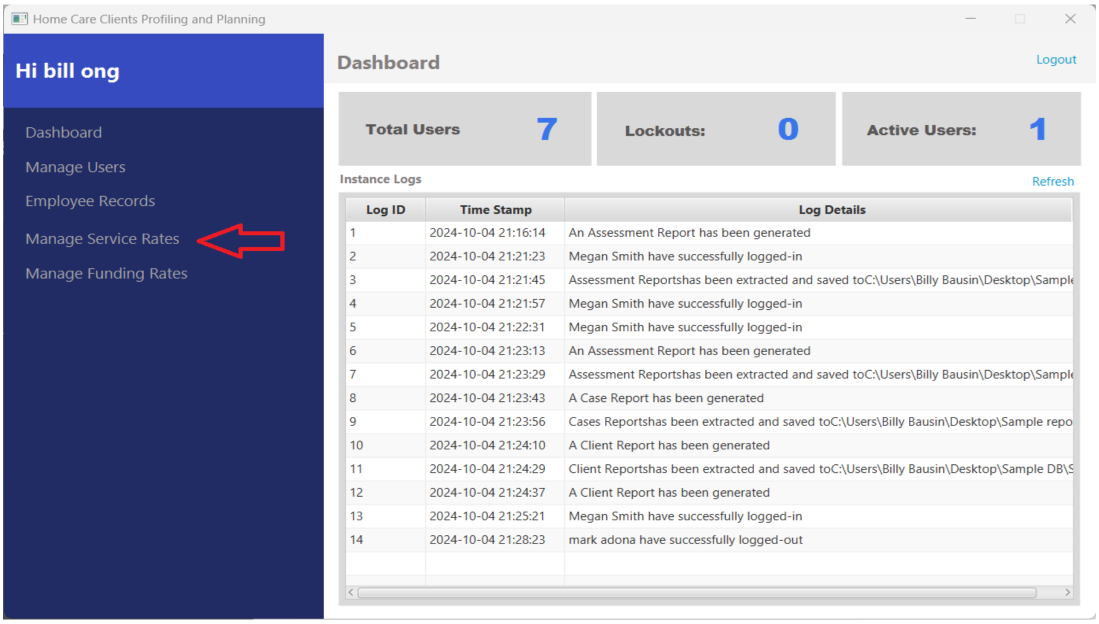


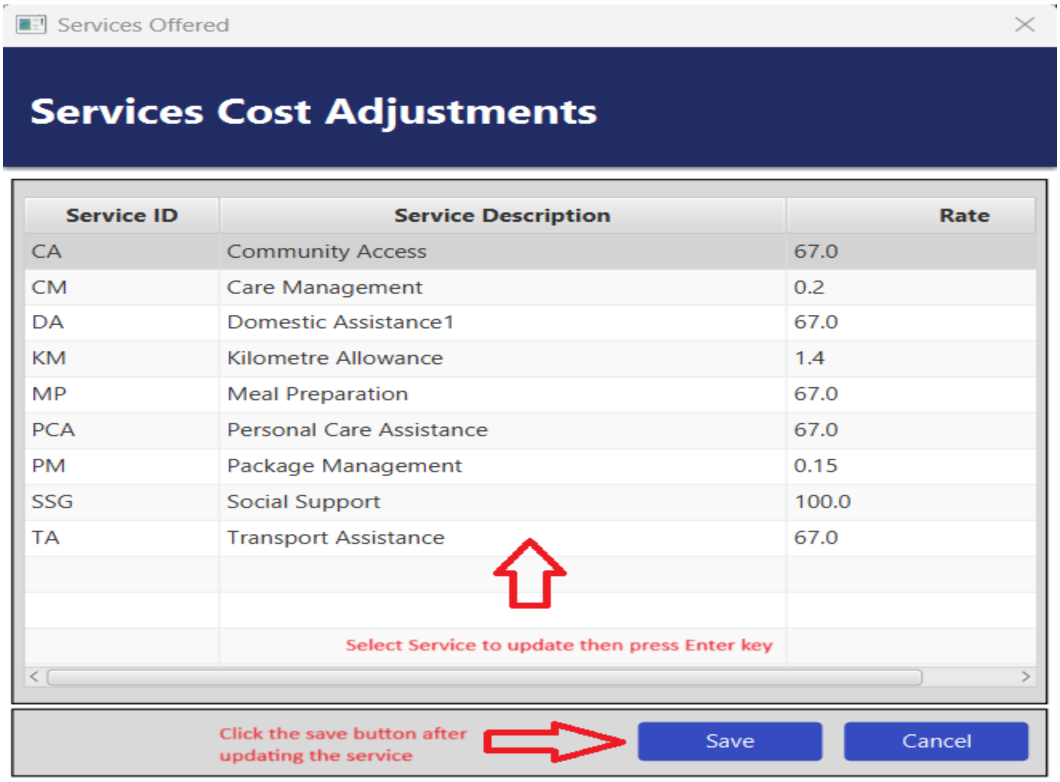

Select a File
Desktop > Bulk Upload Sample
Search Bulk Upload Sample
Organize
New folder
Desktop
Downloads
Documents
Pictures
Videos
Music
COIT20246_2
Updated Progra
Name
Date modified
Type
Size
newemplist
10/4/2024 9:51 PM
Microsoft Excel Co...
1
Select CSV File
File name: newemplist
CSV Files
Click Open after selecting CSV file
Open
Cancel

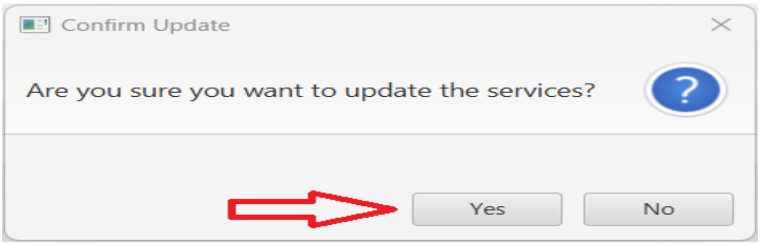

Home Care Clients Profiling and Planning
Hi bill ong
Dashboard
Manage Users
Employee Records
Manage Service Rates
Manage Funding Rates
Manage Employee Records
Logout
Employee ID
Employee Name
Employment Status
Start Date
End
67997, Lily, Active, 2024-10-04, Employed
112233, John, Active, 2024-10-04, 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

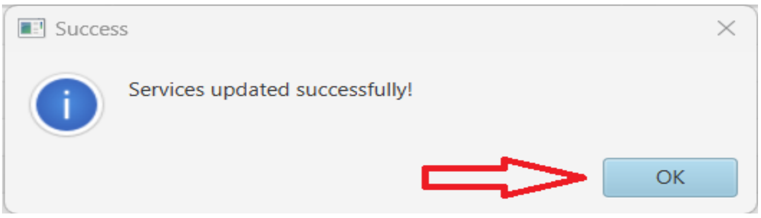

Employee Data
Employee List Bulk Upload
110000026, Michael Brown, 2020-07-20
110000027, Sarah Taylor, 2021-11-10
110000028, David Wilson, 2019-04-14
110000029, Laura Martinez, 2020-12-05
110000030, James Anderson, 2022-01-22
110000031, Emma Thompson, 2021-03-17
110000032, Olivia Garcia, 2020-09-02
110000033, 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.

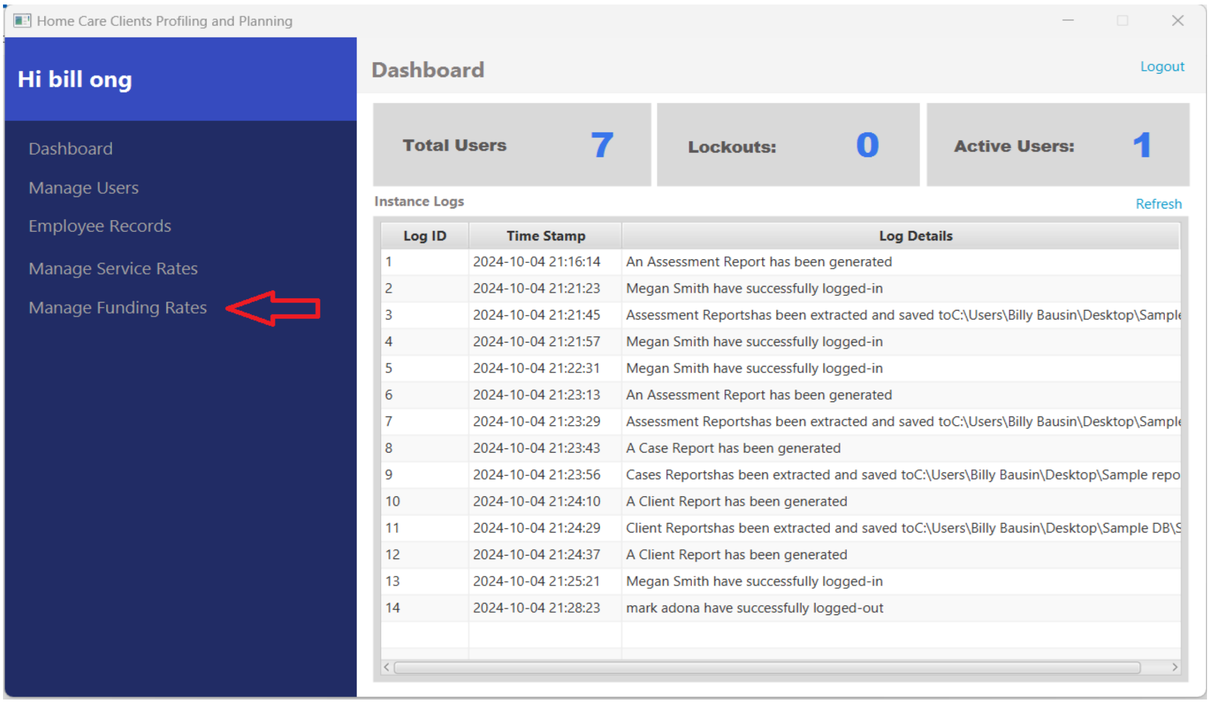


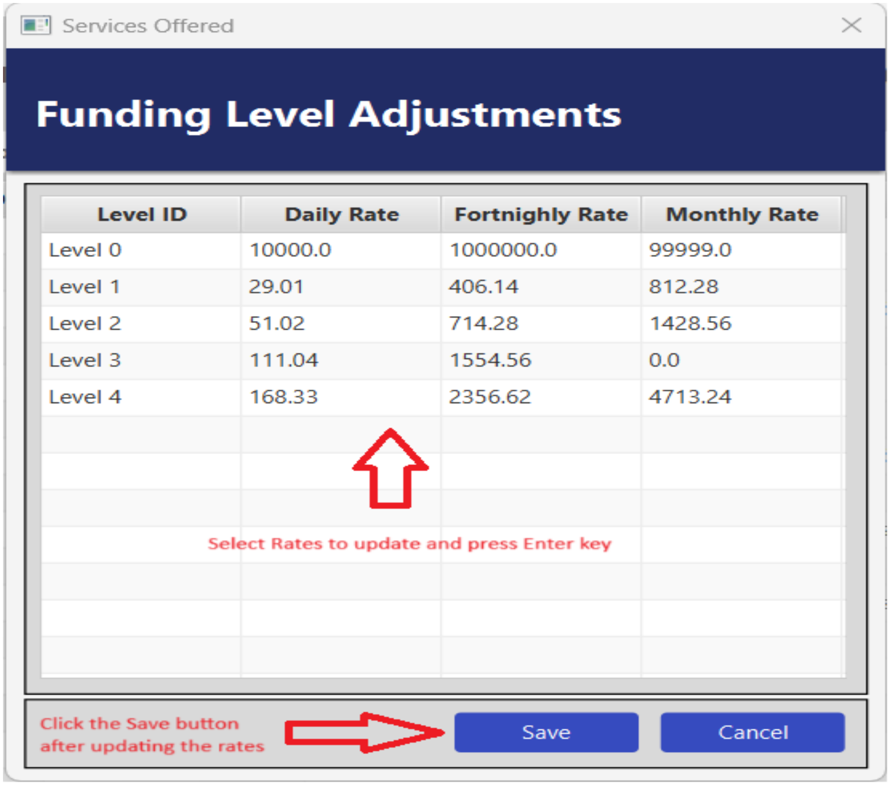


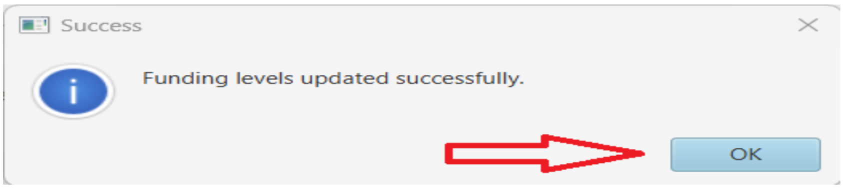




2. To update the Funding Rates, click on the side panel menu. In the new window, update the record directly on the screen. Press the Enter Key in every updated entry to ensure that data will be kept and validated. Once done, click on the save button to confirm update.







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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.

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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.