

# USER'S MANUAL

HOME CARE CLIENT  
PROFILING AND PLANNING



## Contents

|   |    |
|---|----|
| <b>1. Introduction .....</b>  | 3  |
| <b>2. System Requirements .....</b>                                 | 3  |
| <b>3. Execute and Configure.....</b>                                | 3  |
| <b>4. Logging in to the Application .....</b>                       | 4  |
| <b>System Administrator Registration and First-Time Login .....</b> | 4  |
| <b>Subsequent Logins.....</b>                                       | 6  |
| <b>Subsequent User Registration.....</b>                            | 6  |
| <b>Logging out.....</b>   | 8  |
| <b>Forgot Password.....</b>   | 8  |
| <b>5. User Roles and Responsibilities .....</b>                     | 9  |
| <b>5.1 Case Manager.....</b>  | 9  |
| <b>5.2 Client Services Officer (CSO) .....</b>                      | 20 |
| <b>5.3 System Administrator .....</b>                               | 41 |
| <b>9. Error Messages.....</b>                                       | 52 |
| <b>10. Troubleshooting .....</b>                                    | 53 |
| <b>10.1 Common Issues .....</b>                                     | 53 |

---

## 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.

---

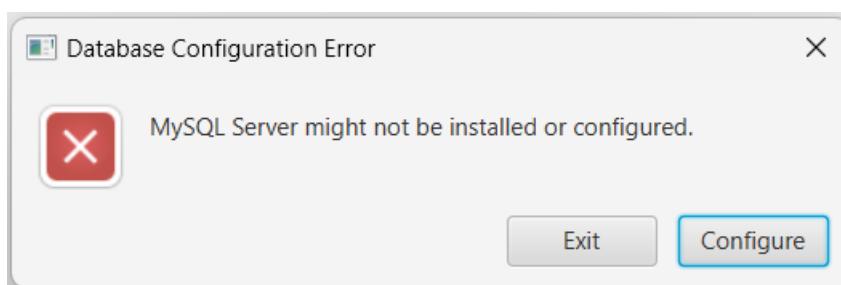
## 2. System Requirements

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

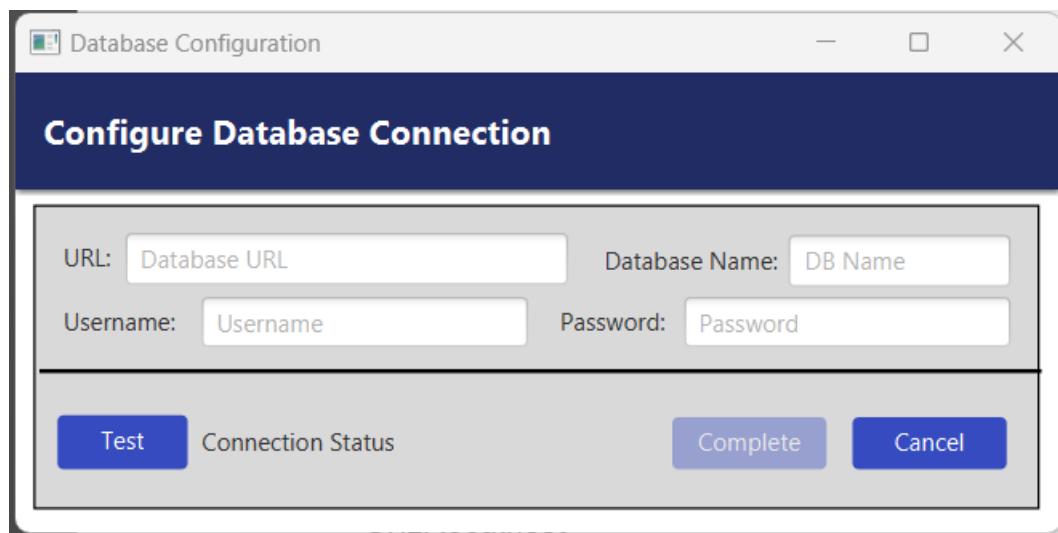
1. Open the software ([HomeCare.exe](#))
2. Wait until the components are fully established.
3. Once the initialisation is complete provide the database configuration details (only on first run). These are MySQL details which should be available upon successful installation of the same.



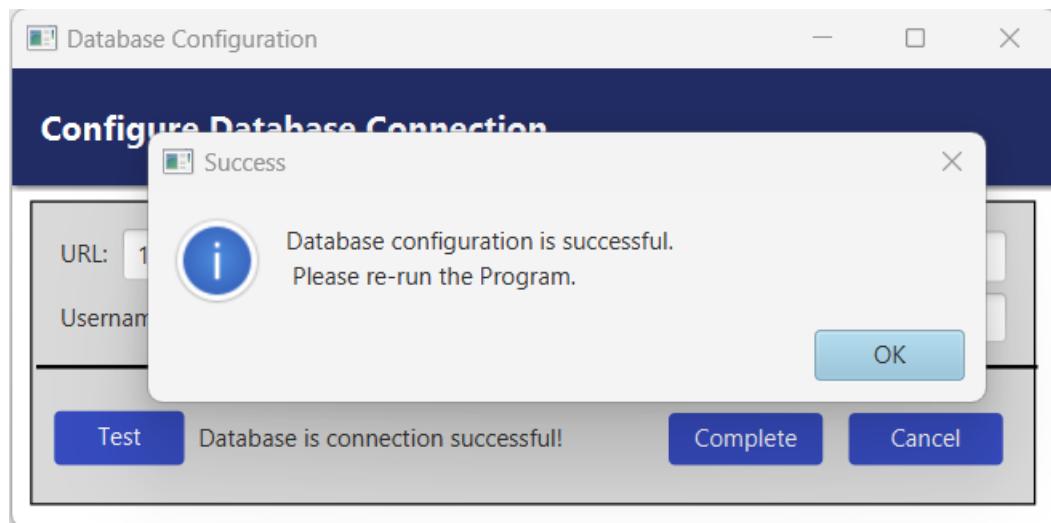
### Default Settings

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.

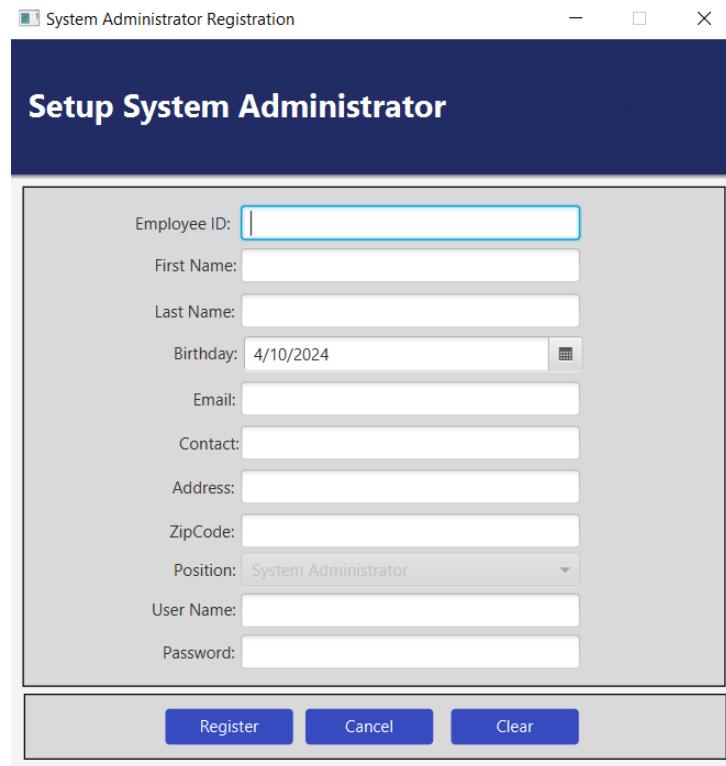


---

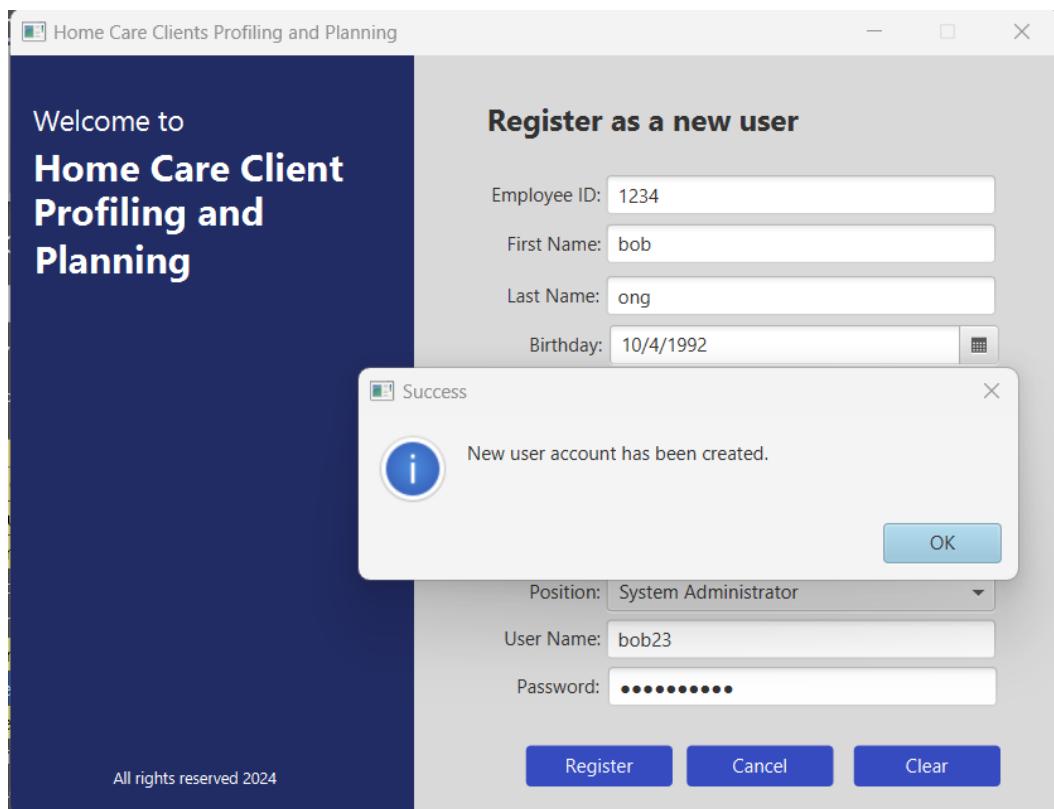
## 4. Logging in to the Application

### 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.

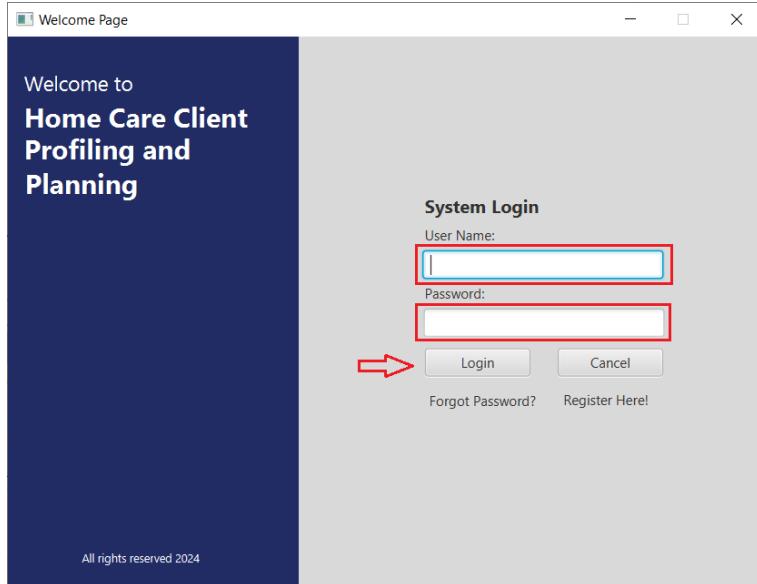


- Fill all the fields and click on Register. Follow the on-screen validation prompts until the successful registration. Once registered, this automatically leads to system login



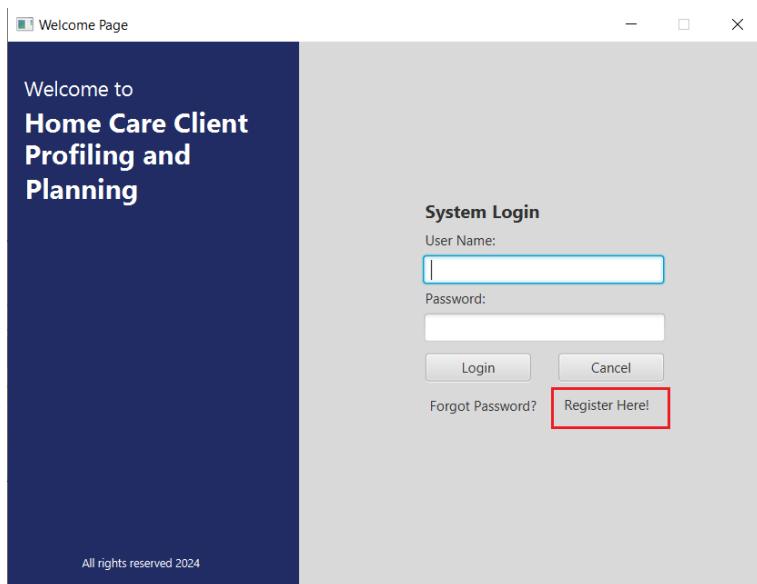
## Subsequent Logins

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

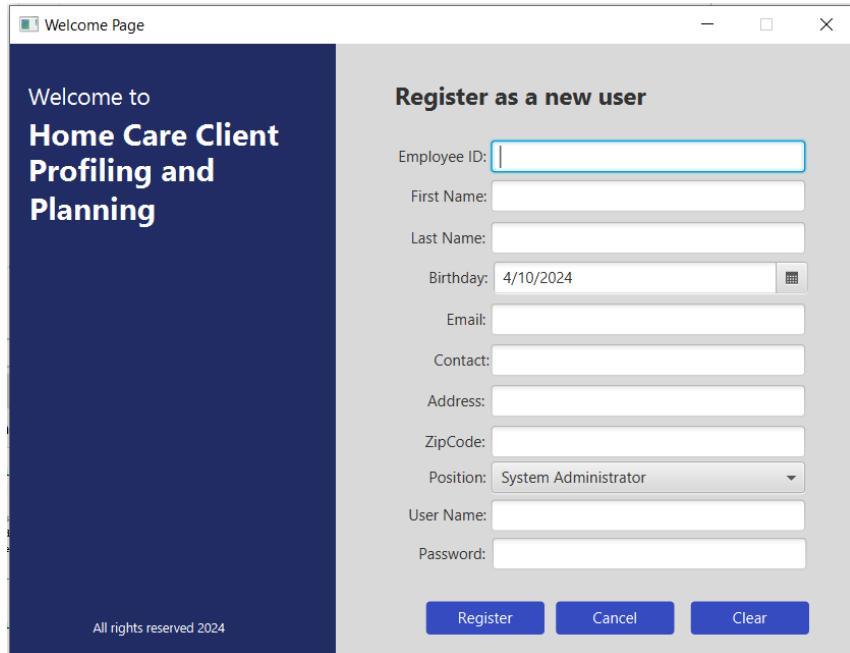


## Subsequent User Registration

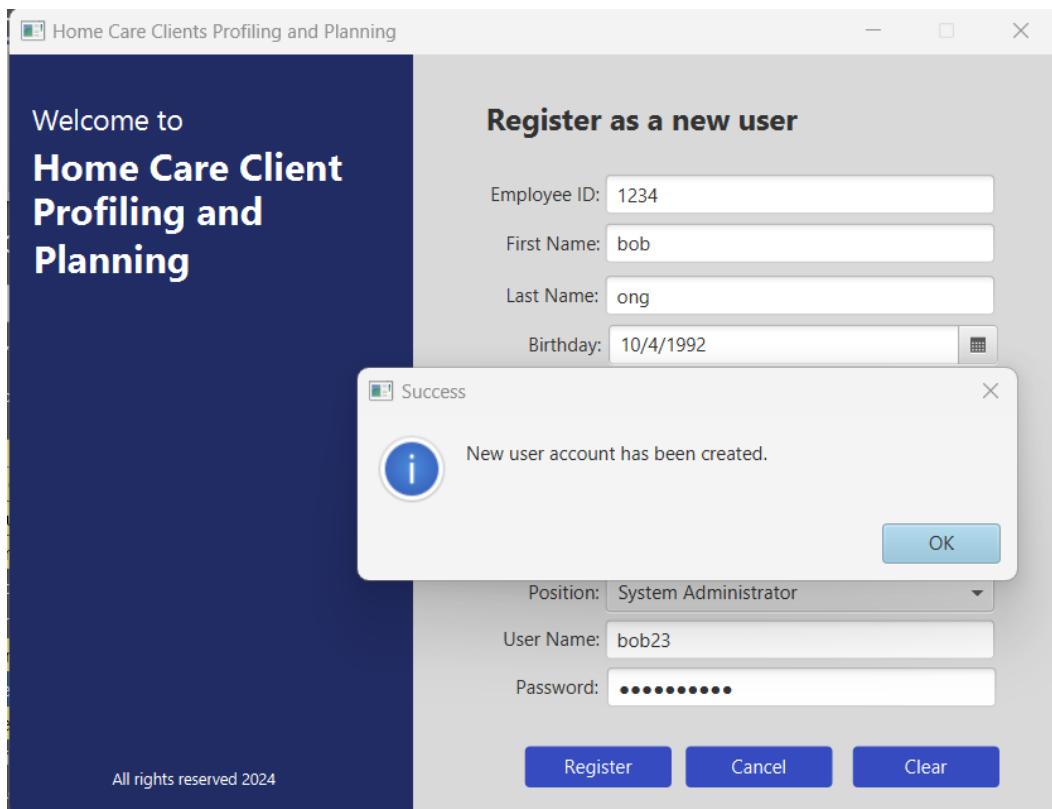
1. On the **Welcome Screen**, click **Register Here!**.



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



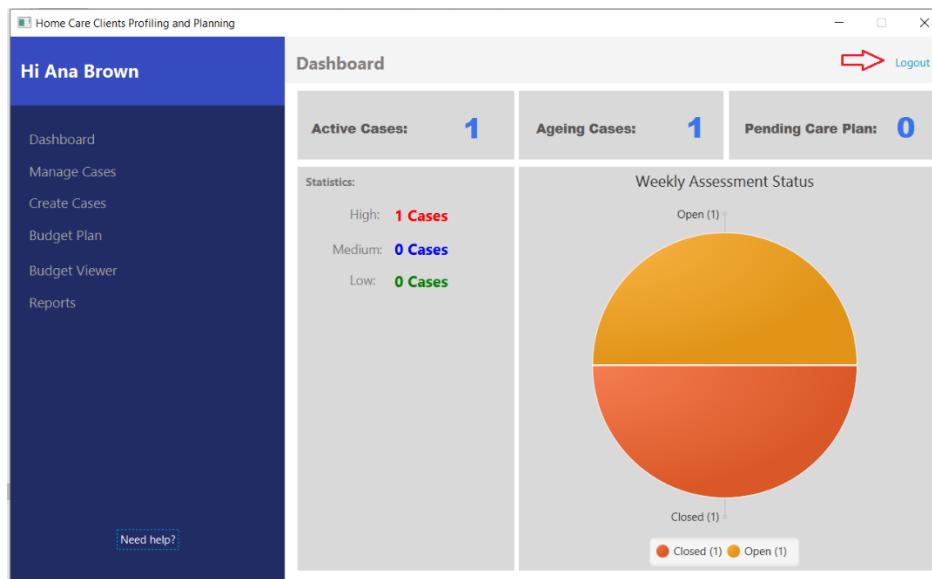
3. Once the account details are submitted, the system will generate a **new account** which can be used to navigate the system depending on the user role.



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 partially visible, showing fields for 'User Name' and 'Password', and 'Login' and 'Cancel' buttons. At the bottom of the screen, there is a footer with the text 'Forgot Password? Register Here!' and 'All rights reserved 2024'.

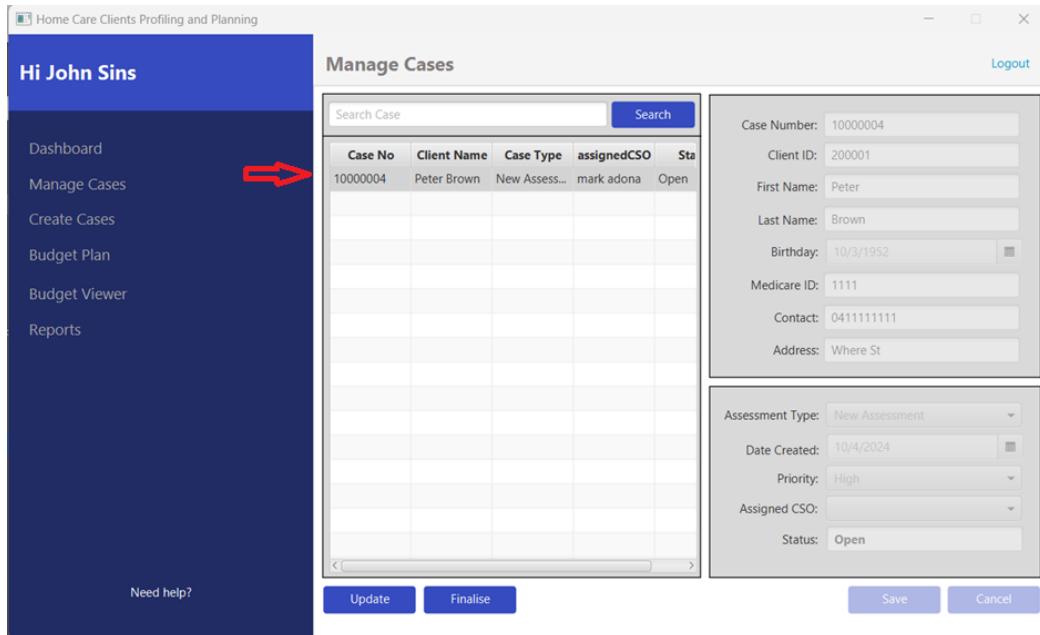
2. Click Reset to confirm the details and follow the on-screen instructions and confirmations.

# 5. User Roles and Responsibilities

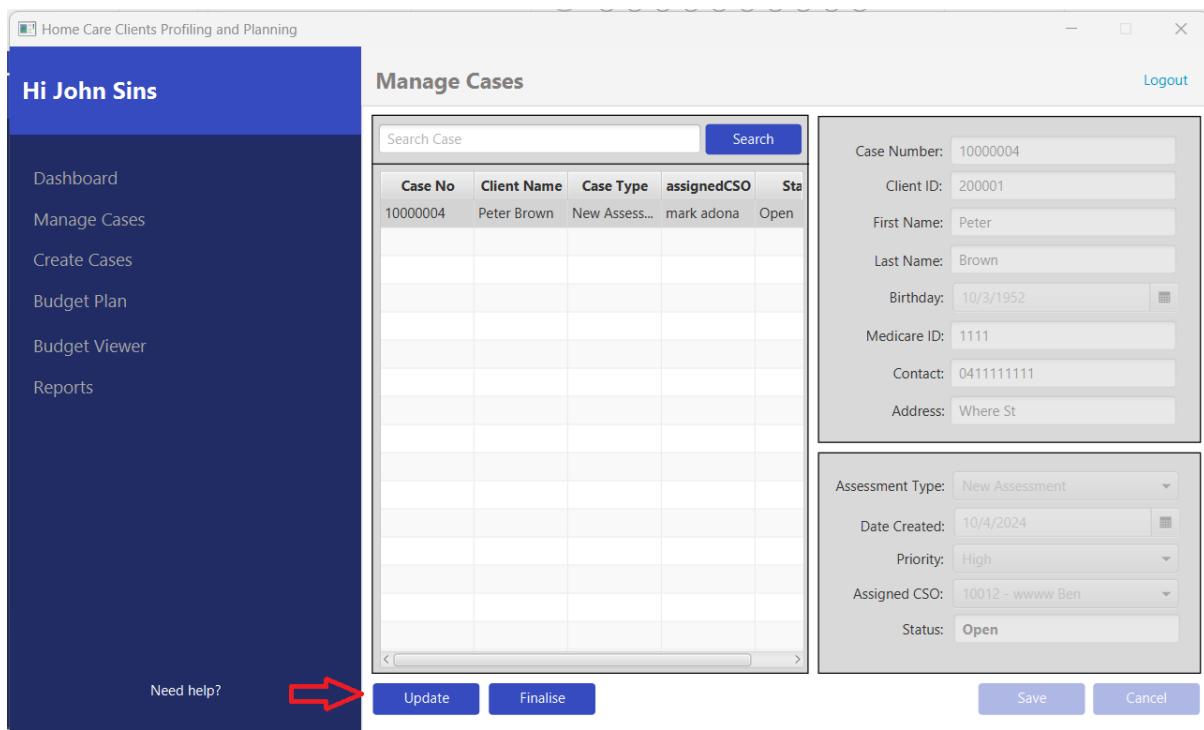
## 5.1 Case Manager

- **Case Management**

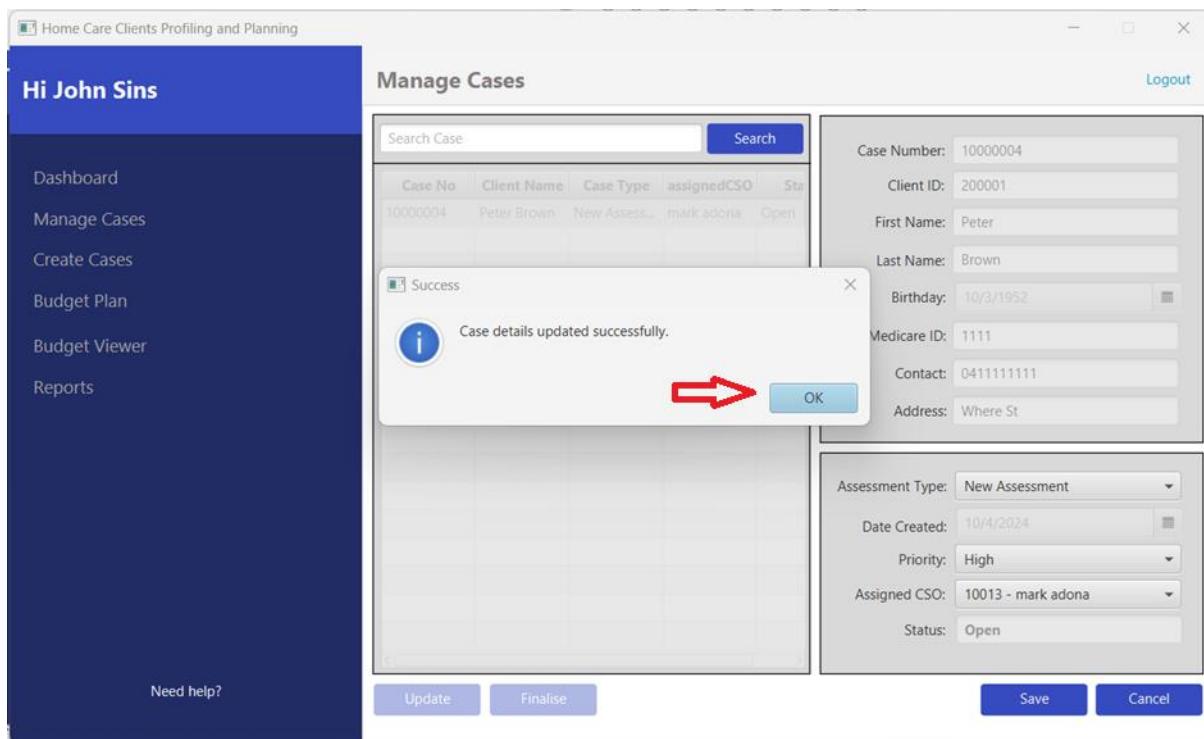
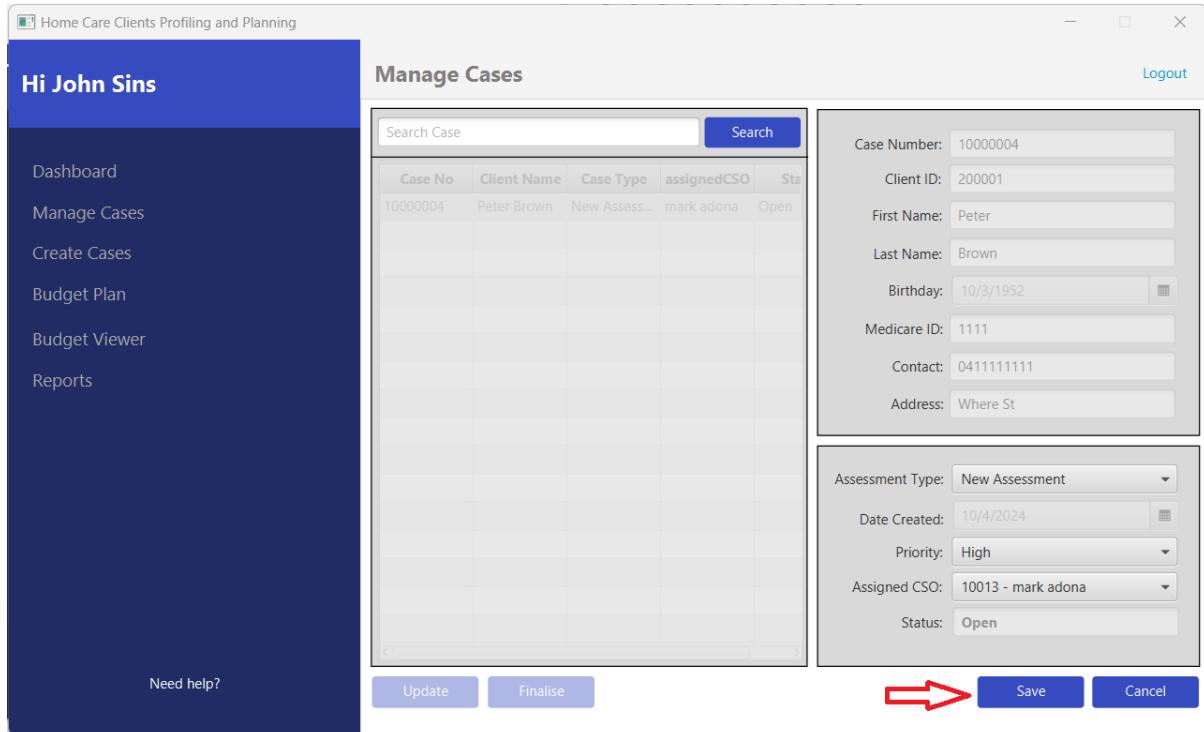
1. To manage the cases, navigate to Manage Case and select a case that you wish to manage.



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

- 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

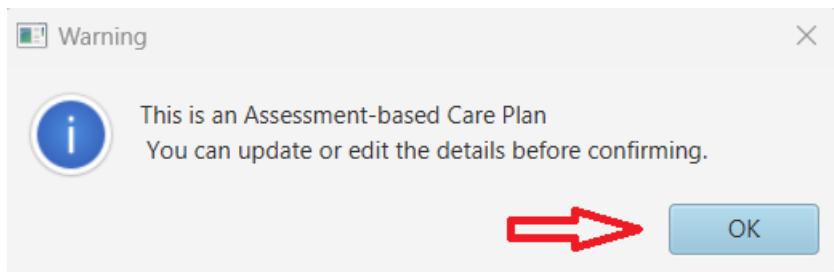
Case No: 10000004  
AssessmentID: 2024000005  
Client ID: 200001  
Medicare: 1111  
Date: 10/4/2024  
Venue: Physically At Home  
Address: Where St

Generate      Cancel      Confirm and Submit

**Comprehensive Care Plan**

This 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

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 same can still be edited to include more detailed approach of care service.

| Goals   | Action |
|---|--------|
| <b>HYGIENE</b><br>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.<br><br>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 .<br><br><b>MOBILITY</b><br>Peter Brown requires Independent 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 . |        |

- 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)

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 same can still be edited to include more detailed approach of care service.

**Goals** **Action**

**HYGIENE**

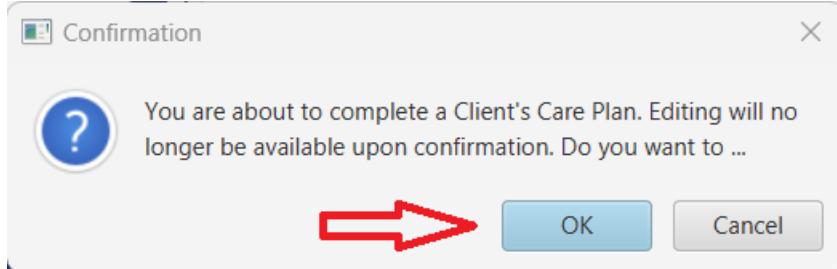
Peter Brown requires Supervision (stand-by/in home whilst undertaken) for bathing, grooming, dressing, and undressing tasks. Peter Brown can walk to the bathroom, and can scrub with a sponge or brush. Peter Brown is also able to groom themselves and prefers to shower daily, preferably in the morning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

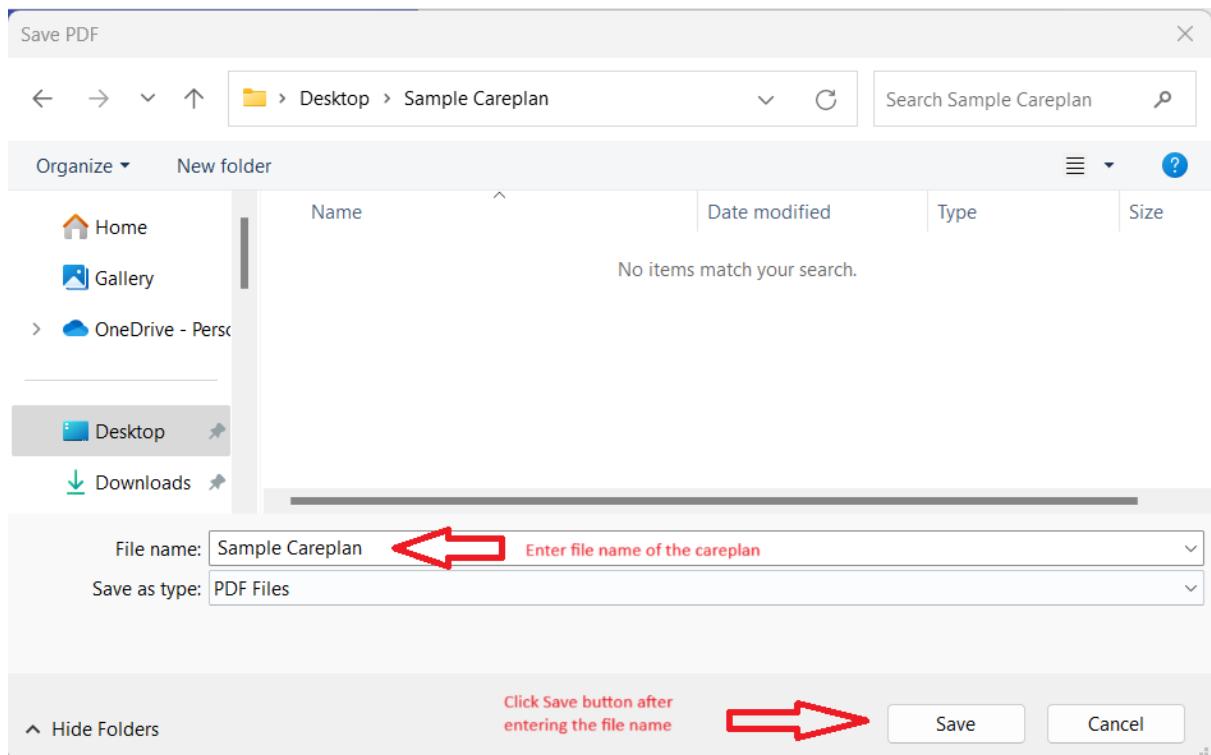
Peter Brown requires Encouragement (prompting/reminding) for oral hygiene. They can hold a toothbrush. They can squeeze toothpaste by themselves. They are able to rinse their mouth without assistance. Peter Brown has Yes and has Denture. Their last dentist visit was on 2024-10-04, and their next scheduled 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





**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.

**Hi John Sins**

**Manage Cases**

| Case No  | Client Name | Case Type     | assignedCSO | Status   |
|----------|-------------|---------------|-------------|----------|
| 10000004 | Peter Brown | New Assess... | mark adona  | Complete |

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

Need help?      Update      Finalise      Save      Cancel

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

Create New Case

## 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:

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**

Client Number: 200002  
Client Name: Gregory Williams  
Medicare ID: 1234  
Funding Level: Level 2

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**

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

Create New Case

## 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       |

Client ID:

First Name:

Last Name:

Birthday:

Medicare ID:

Contact:

Address:

Case Type:

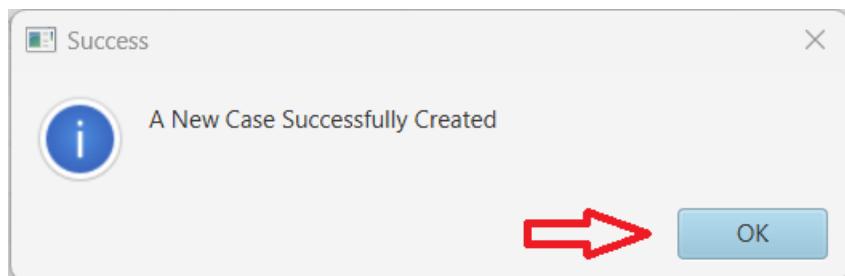
Client Status:

Date Created:

Priority:

CSO Assignment:

Target Completion:

- **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.

Home Care Clients Profiling and Planning

## Budget Planning

Logout

**Hi John Sins**

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

Need help?

| Client ID | Client Name |
|-----------|-------------|
| 200001    | Peter Brown |

**Client Details**

Client No:  Client Name:   
 Client DOB:  Fund Level:   
 Prepared By:  Date:

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

**Management Details**

| Government Subsidy   | Month                |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |

**Total Amount to Spend**

**ITEMISED MONTHLY BUDGET**

| Description of Care/ Support Services | Numbers of Units | Total |
|---------------------------------------|------------------|-------|
| No content in table                   |                  |       |

Home Care Clients Profiling and Planning

## Budget Planning

Logout

**Hi John Sins**

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

Need help?

| Client ID | Client Name |
|-----------|-------------|
| 200001    | Peter Brown |

**Client Details**

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

**Click the Generate button after selecting the client** 

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

**Management Details**

| Government Subsidy   | Month                |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> |

**Total Amount to Spend**

**ITEMISED MONTHLY BUDGET**

| Description of Care/ Support Services | Numbers of Units | Total |
|---------------------------------------|------------------|-------|
| No content in table                   |                  |       |

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

Home Care Clients Profiling and Planning

### Budget Planning

Logout

Hi John Sins

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

Need help?

| Client ID | Client Name |
|-----------|-------------|
| 200001    | Peter Brown |

**Client Details**

Client No: 200001 Client Name: Peter Brown  
 Client DOB: 1952-10-03 Fund Level: Level 0  
 Prepared By: John Sins Date: 2024-10-04

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

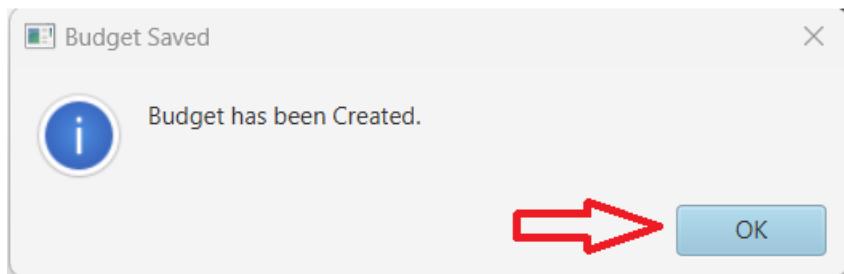
**Management Details**

| Government Subsidy                      | Month      |
|---|------------|
| 10000.00                                | 1199988.00 |
| Less Care Management Fee 0.20 %         | 19999.80   |
| Less Package Management Fee 0.15 %      | 14999.85   |
| <b>Total Amount to Spend</b> 1164988.35 |            |

**ITEMISED MONTHLY BUDGET**

| Description of Care/ Support Services | Numbers of Units | Total |
|---------------------------------------|------------------|-------|
| No content in table                   |                  |       |

➡ Save Cancel



## 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.

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' and contains a table titled 'Assigned Cases'. The table has columns for 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. Below the table is a form with fields for 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 the form are two buttons: 'Start Assessment' and 'Complete/Close'. A modal dialog box is open, prompting for Case ID (10000004) and Date, with a text area for Closing Reasons and 'Confirm' and 'Cancel' buttons.

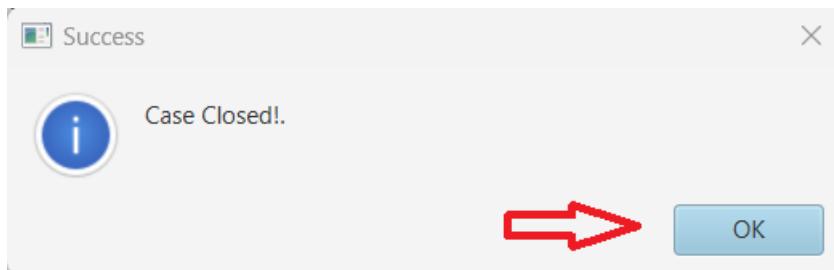
## 2. Closing a Case

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 similar to the one above, showing the software's interface. A red arrow points to the 'My Cases' option in the sidebar. Another red arrow points to the 'Complete/Close' button in the modal dialog box, which is now clearly visible. The rest of the interface elements are identical to the previous screenshot.

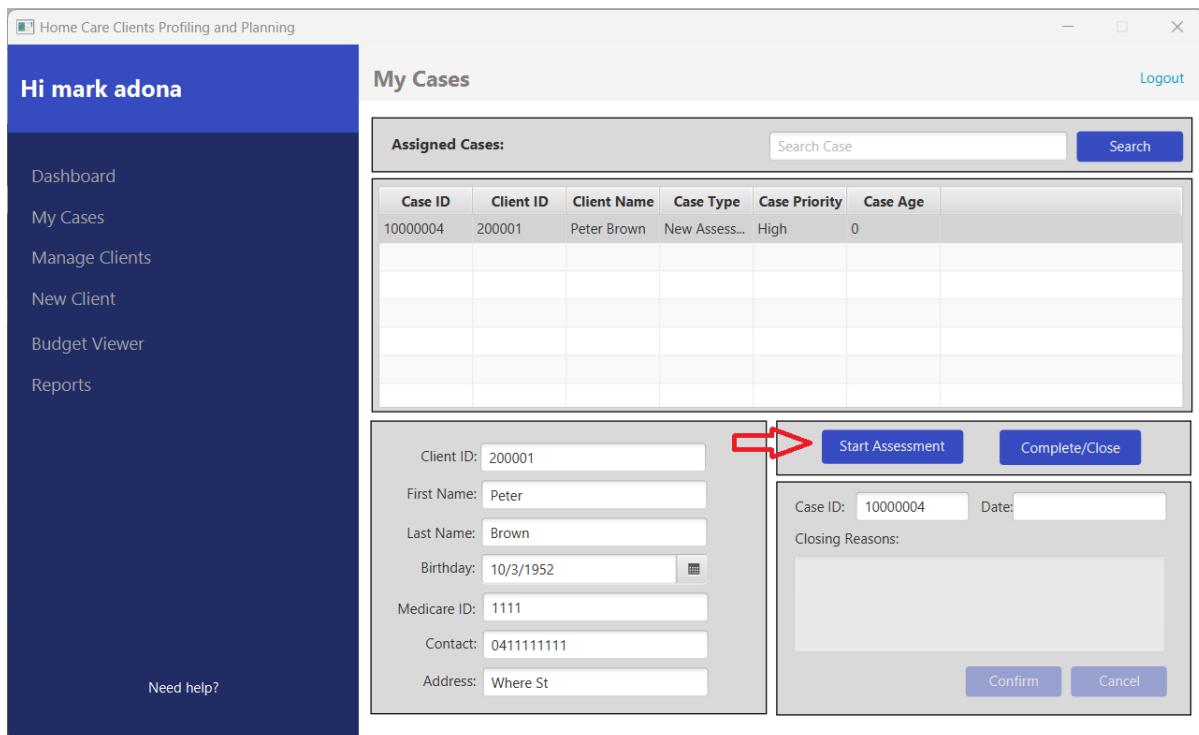
Click on confirm button to close the case.

The screenshot shows the software's main interface. On the left, a sidebar menu lists: Dashboard, My Cases, Manage Clients, New Client, Budget Viewer, and Reports. A 'Need help?' link is also present. The main area is titled 'My Cases' and contains a sub-section titled 'Assigned Cases'. This section includes a search bar and a table with columns: Case ID, Client ID, Client Name, Case Type, Case Priority, and Case Age. One row is visible in the table, showing: 10000006, 200004, ew ew, New Assess..., High, and 0. Below this is a detailed view of client information for Case ID 10000006, including fields for First Name (ew), Last Name (ew), Birthday (10/11/1951), Medicare ID (2323), Contact (0000000000), and Address (wewe@yahoo.com). To the right of this is a panel with 'Start Assessment' and 'Complete/Close' buttons. It also shows the case details again and a 'Closing Reasons' field containing 'Done Assessment'. A red arrow points to the 'Confirm' button at the bottom right of this panel.

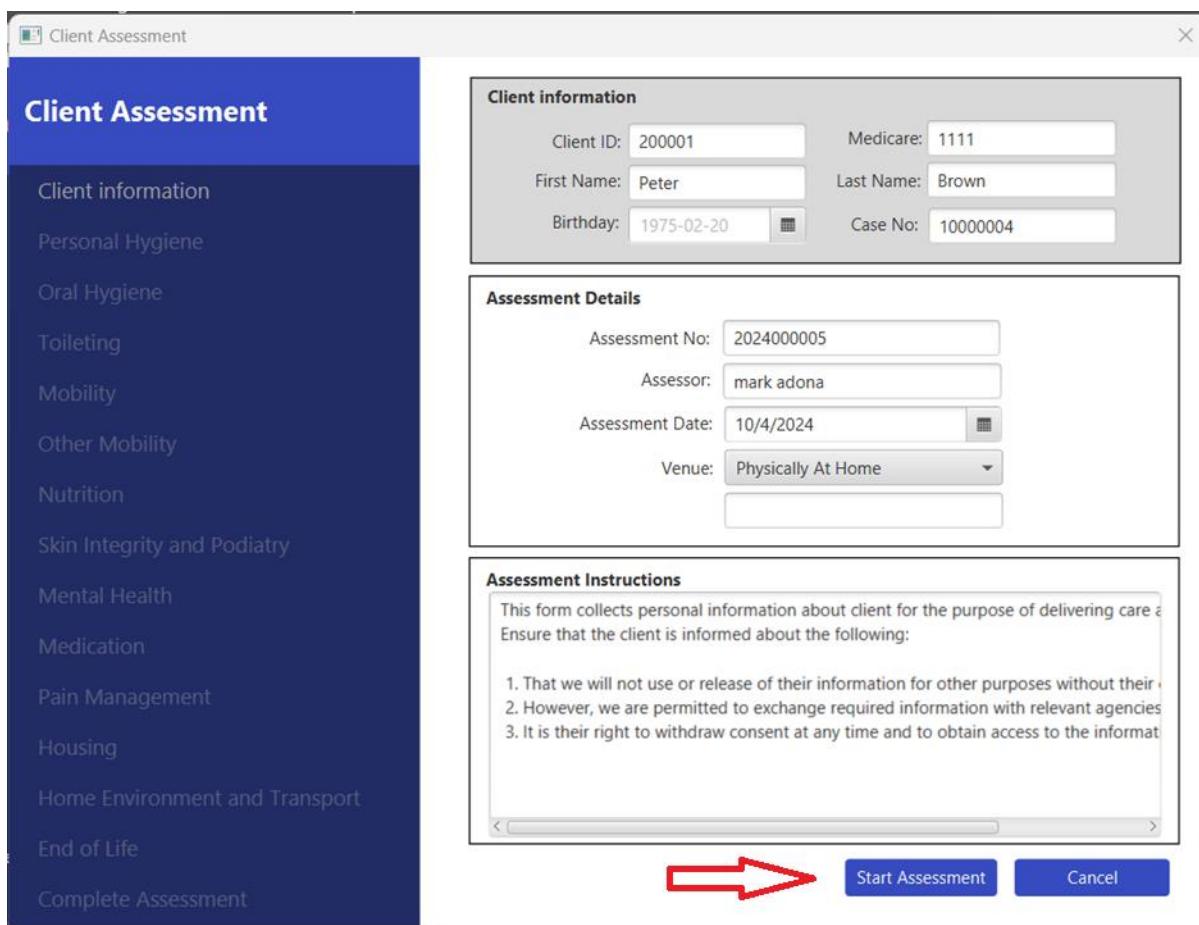


### 3. Making Assessments

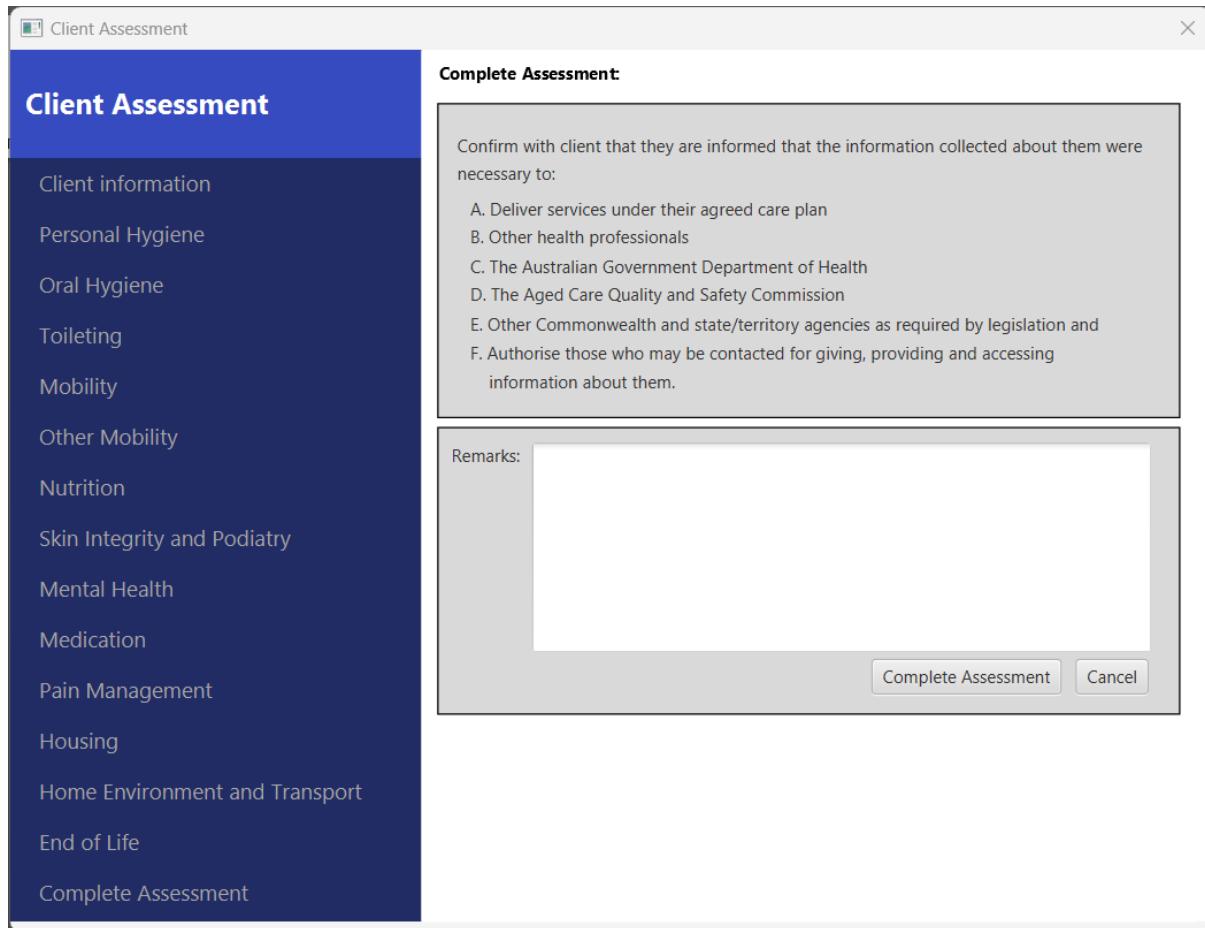
To proceed with the assessments, select a client entry from the table and click the Start Assessment.



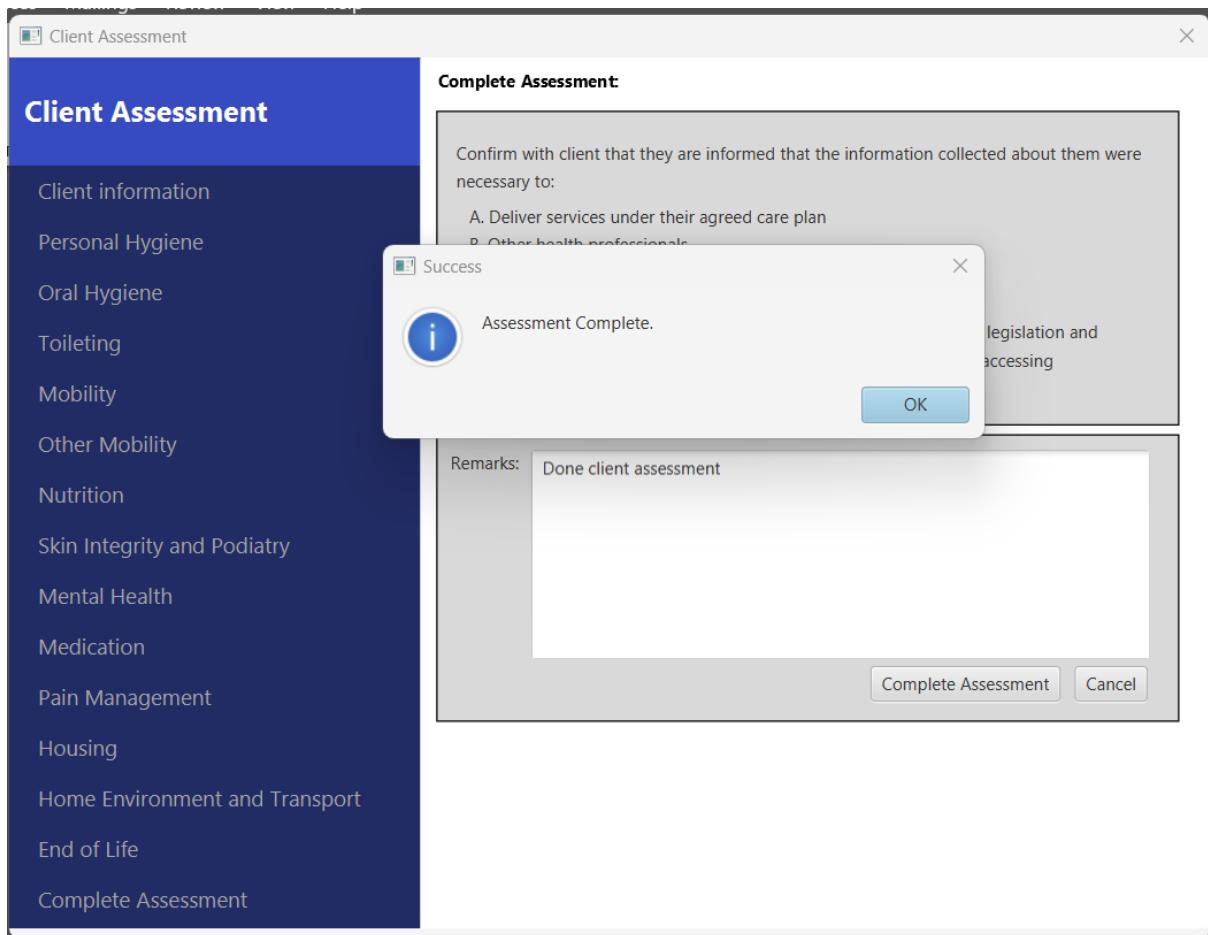
- A new window will open which contain the client and case information. Follow the on-screen instructions to complete the assessment.



- 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.

The screenshot shows the 'Home Care Clients Profiling and Planning' application window. The left sidebar includes links for Dashboard, My Cases, Manage Clients (with a red arrow pointing to it), New Client, Budget Viewer, Reports, and Need help?. The main area is titled 'Client Profiles' and contains a 'Search Client' input field and a 'Search' button. Below is a table with columns 'Client ID' and 'Client Name'. Two rows are visible: 200001 Peter Brown and 200002 Gregory Williams. To the right of the table are three sections: '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: 0411111111, 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 buttons for Update, Deactivate, Save, and Cancel.

Home Care Clients Profiling and Planning

Hi mark adona

Client Profiles

Logout

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

| Client ID | Client Name      |
|-----------|------------------|
| 200001    | Peter Brown      |
| 200002    | Gregory Williams |

Search Client

**Personal Information**

|             |            |            |                  |
|-------------|------------|------------|------------------|
| Client ID:  | 200001     | Medicare:  | 1111             |
| First Name: | Peter      | Last Name: | Brown            |
| Address:    | Where St   |            |                  |
| Zip Code:   | 103/1952   |            |                  |
| 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:       |         |               |       |



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

Client Profiles

Logout

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

| Client ID | Client Name      |
|-----------|------------------|
| 200001    | Peter Brown      |
| 200002    | Gregory Williams |

Search Client

**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

Dashboard

My Cases

Manage Clients

New Client

Budget Viewer

Reports

Need help?

### Client Profiles

| Client ID | Client Name      |
|-----------|------------------|
| 200001    | Peter Brown      |
| 200002    | Gregory Williams |

Success

Client record updated successfully.

Personal Information

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

Funding and Care Management

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

Update Deactivate Save Cancel

- 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

Dashboard

My Cases

Manage Clients

New Client

Budget Viewer

Reports

Need help?

### Client Profiles

| 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

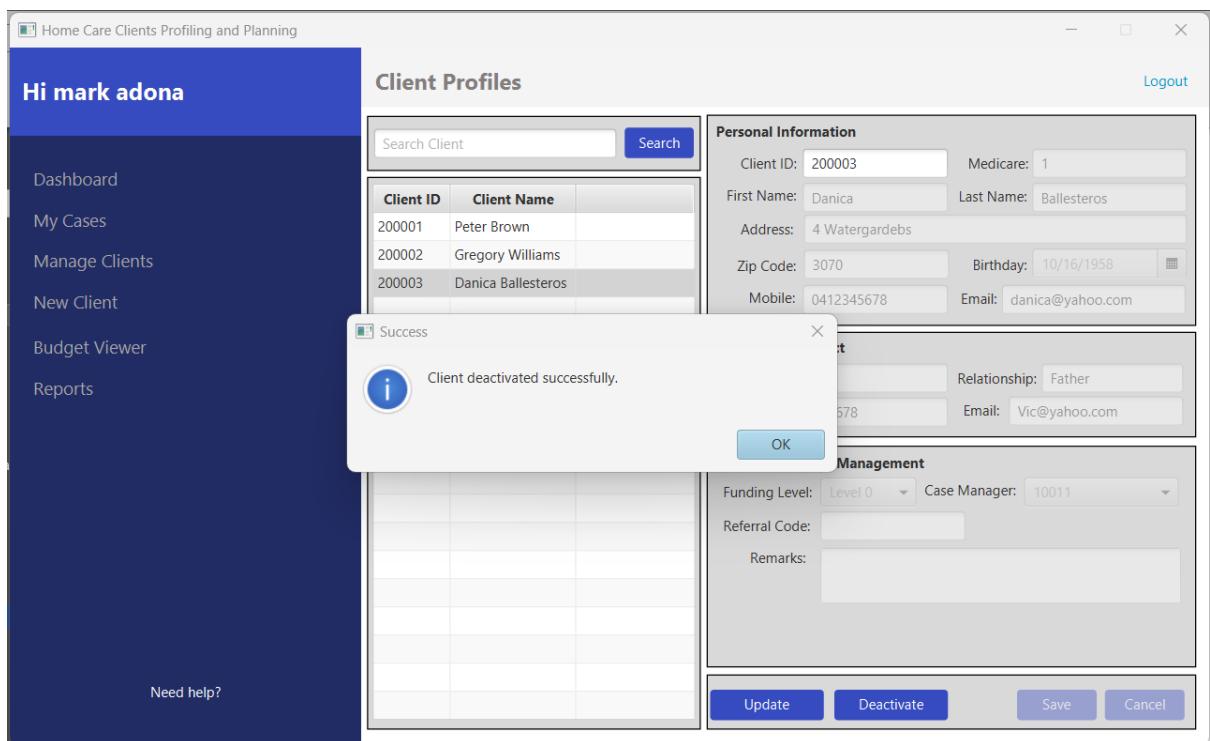
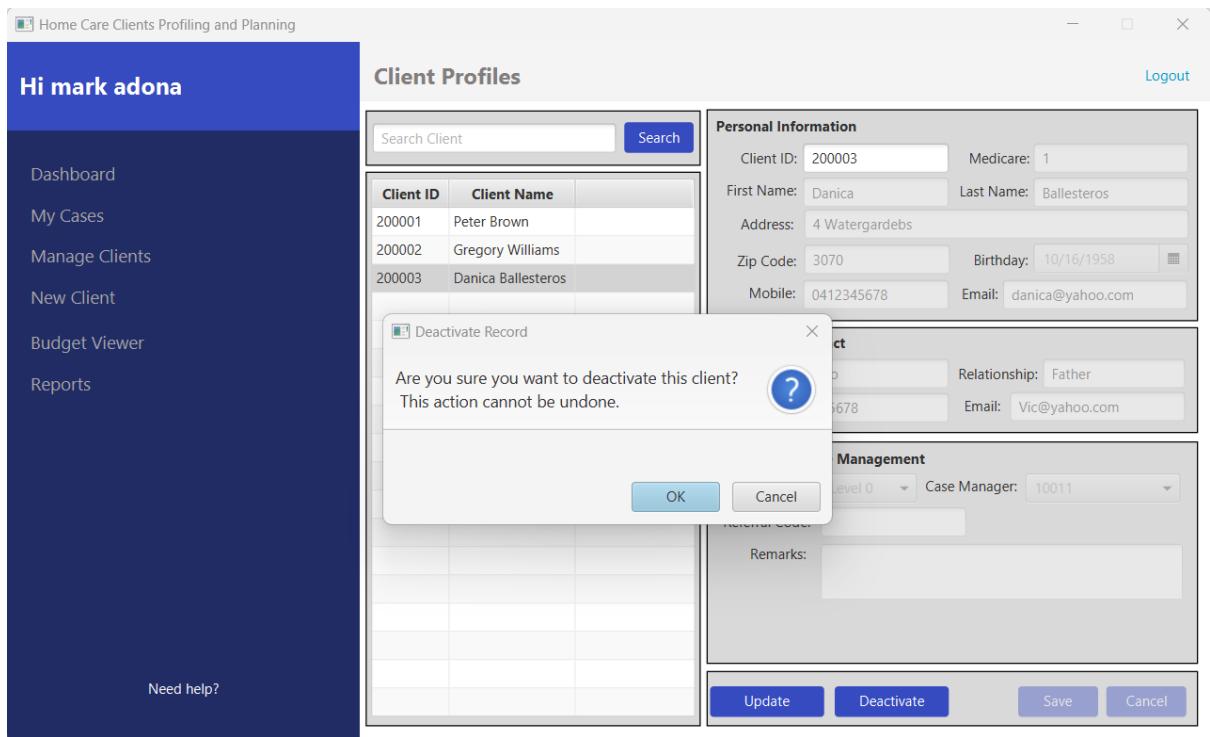
Emergency Contact

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

Funding and Care Management

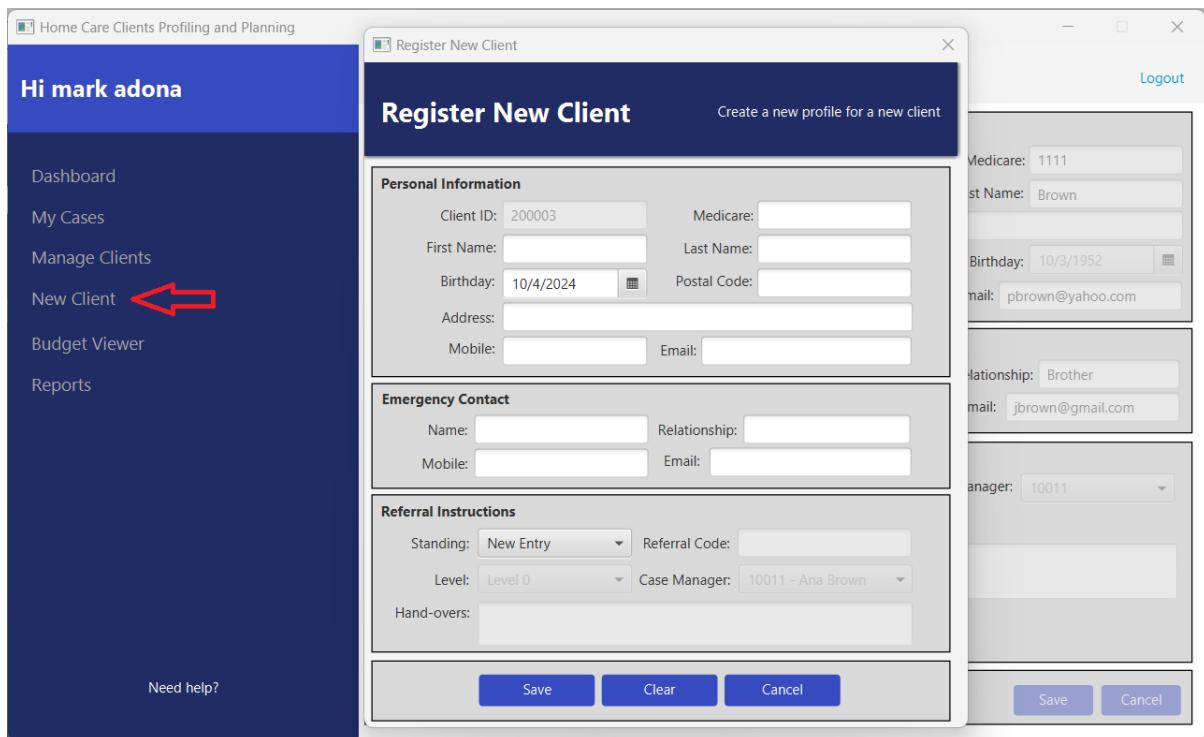
Funding Level: Level 0 Case Manager: 10011  
Referral Code:  
Remarks:

Update Deactivate Save Cancel



- **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.

This screenshot shows the "Register New Client" dialog box with sample data entered. The "Personal Information" section includes Client ID 200003, Medicare 1, First Name Danica, Last Name Ballesteros, Birthday 10/4/1992, Postal Code 3070, Address 4 Watergardebs, Mobile 0456124574, and Email danica@yahoo.com. The "Emergency Contact" section lists Vic Sotto as the relationship Father, with mobile 04123457 and email Vic@yahoo.com. The "Referral Instructions" section shows Standing as New Entry, Referral Code empty, Level as Level 0, Case Manager as 10011 - Ana Brown, and Hand-overs empty. At the bottom are "Save", "Clear", and "Cancel" buttons.

- 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: |           |                |                   |

 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 |

 Client Record Created

**OK**

**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: |           |                |                   |

Save    Clear    Cancel

- **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.

The screenshot shows the 'Client Profiles' screen of the software. On the left, a sidebar lists navigation options: Dashboard, My Cases, Manage Clients, New Client, Budget Viewer (which has a red arrow pointing to it), and Reports. Below the sidebar is a 'Need help?' link. The main area is titled 'Client Profiles' and contains a search bar and a table of client information. The table has columns for Client ID and Client Name, showing entries for 200001 (Peter Brown) and 200002 (Gregory Williams). To the right of the table are three sections: 'Personal Information', 'Emergency Contact', and 'Funding and Care Management'. Each section contains various input fields like Client ID, Name, and Case Manager. At the bottom right are buttons for Update, Deactivate, Save, and Cancel.

| 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: 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:

Update Deactivate Save Cancel

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   |
| <b>Total Amount to Spend</b> |          | 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**

| Government Subsidy           |        | Month      |
|------------------------------|--------|------------|
| 10000.00                     |        | 1199988.00 |
| Less Care Management Fee     | 0.15 % | 19999.80   |
| Less Package Management Fee  | 0.20 % | 14999.85   |
| <b>Total Amount to Spend</b> |        | 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**

**Management Details**

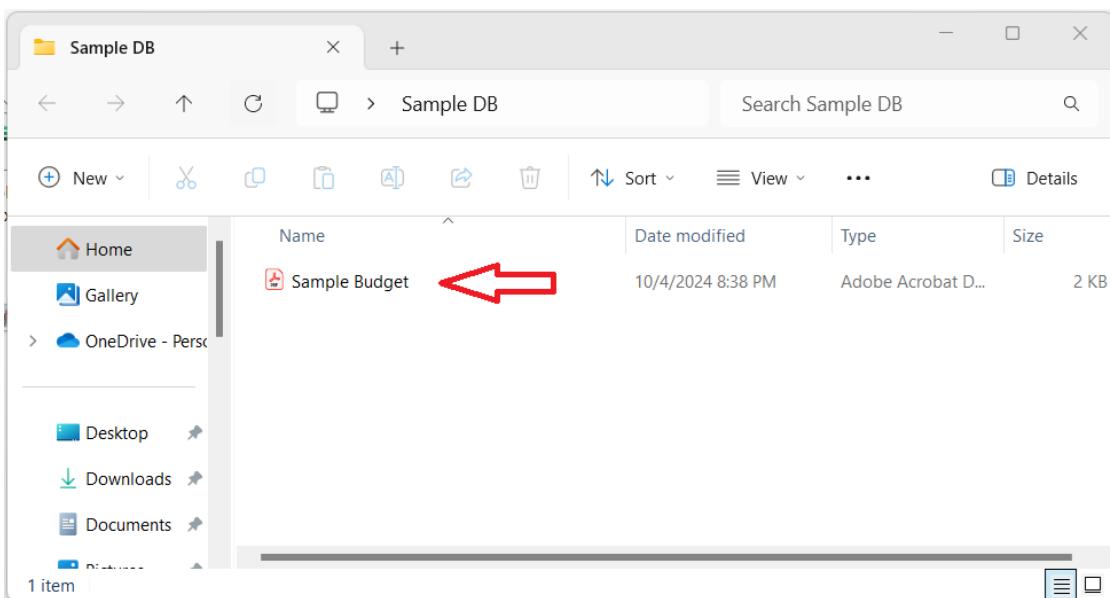
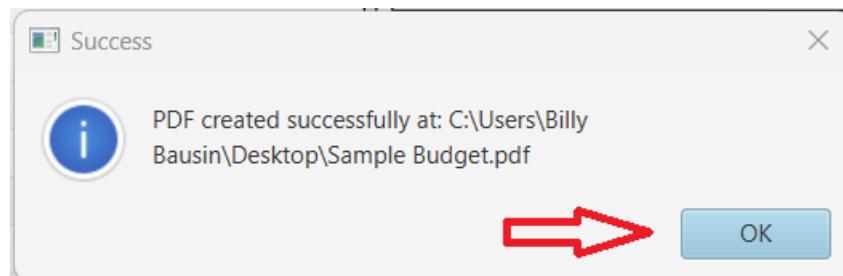
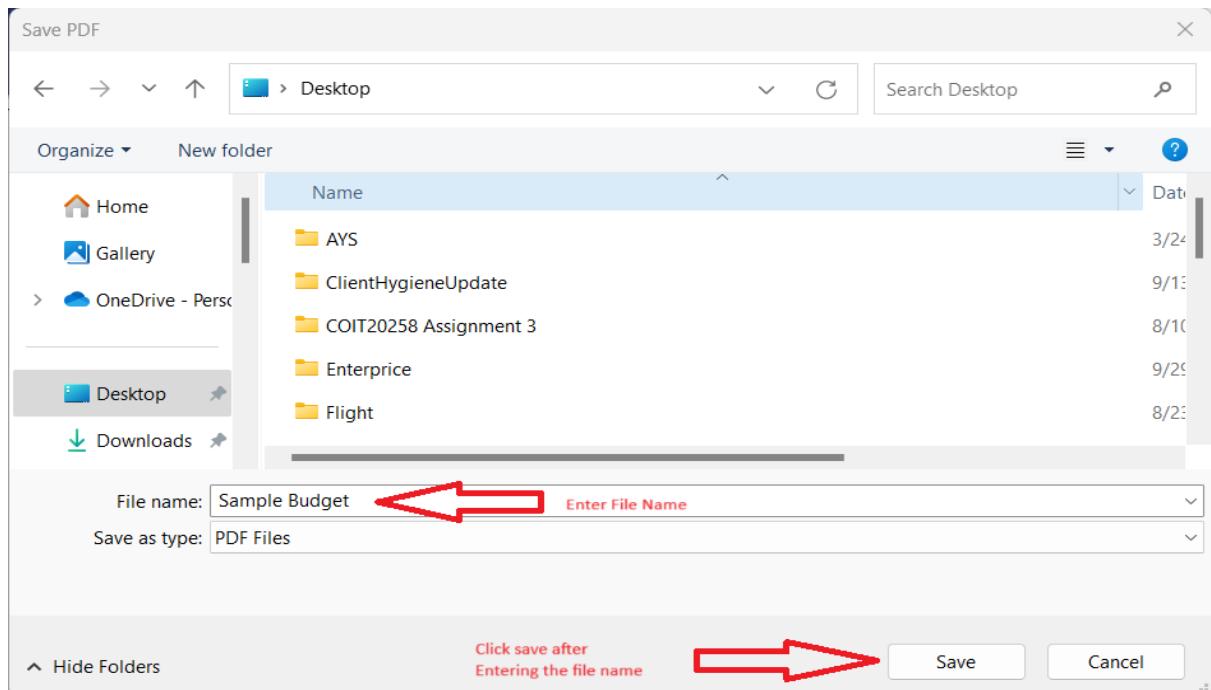
| Government Subsidy           |        | Month      |
|------------------------------|--------|------------|
| 10000.00                     |        | 1199988.00 |
| Less Care Management Fee     | 0.15 % | 19999.80   |
| Less Package Management Fee  | 0.20 % | 14999.85   |
| <b>Total Amount to Spend</b> |        | 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        |
| <b>Total Expenses:</b> |       | <b>\$402.00</b> |

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.

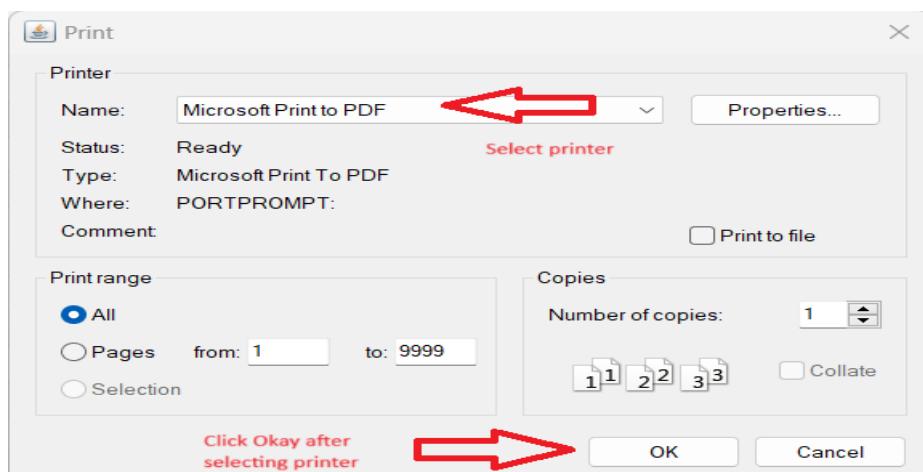
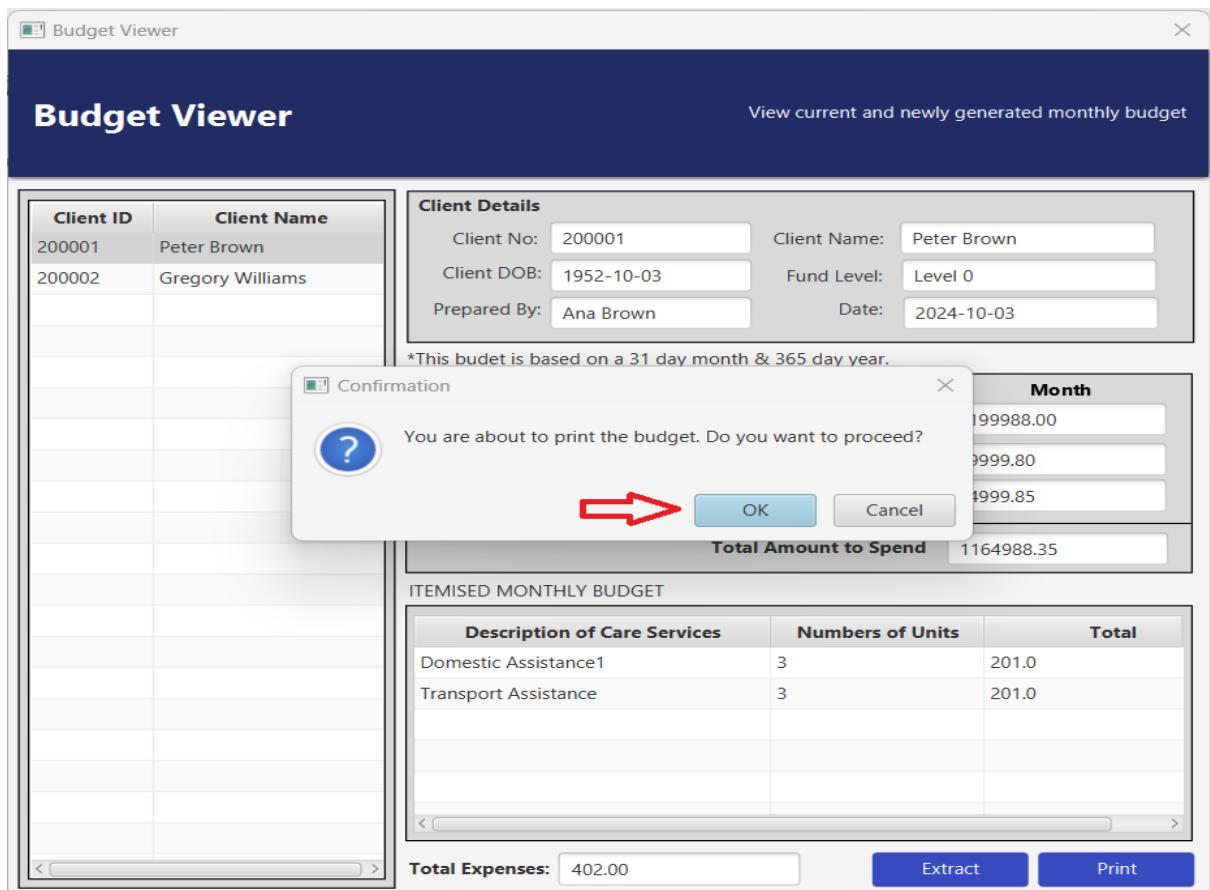
|   |              |
|---|--------------|
| <b>Management Details</b>               | <b>Month</b> |
| Government Subsidy 10000.00             | 1199988.00   |
| Less Care Management Fee 0.15 %         | 19999.80     |
| Less Package Management Fee 0.20 %      | 14999.85     |
| <b>Total Amount to Spend</b> 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 |

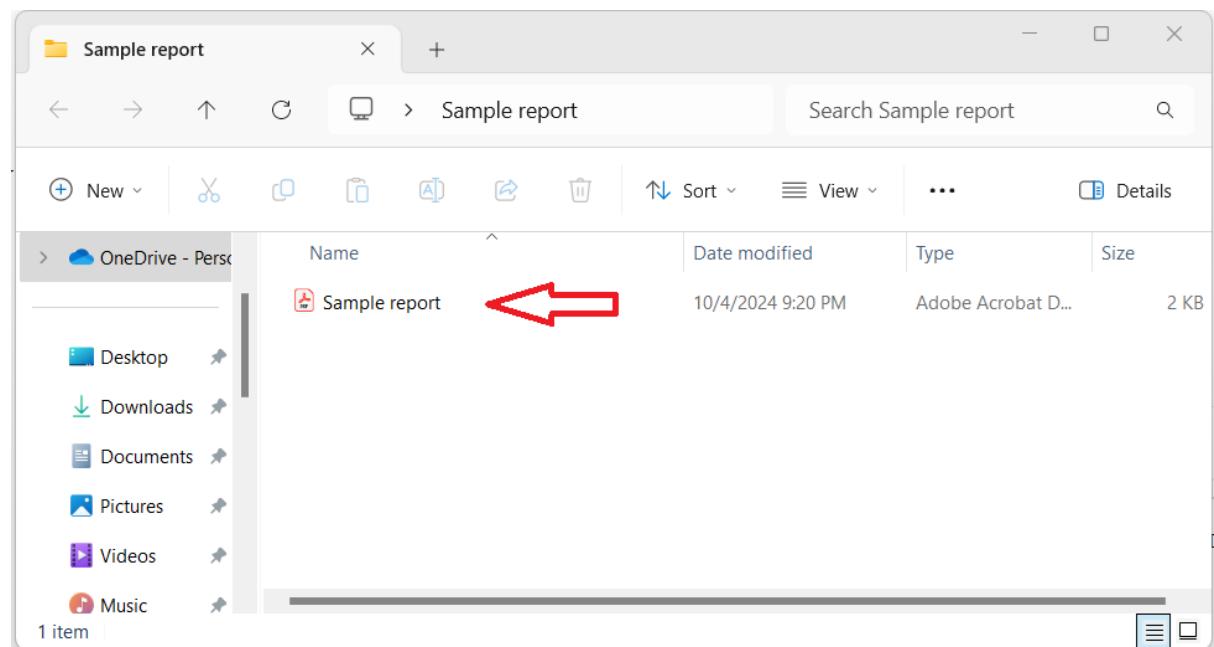
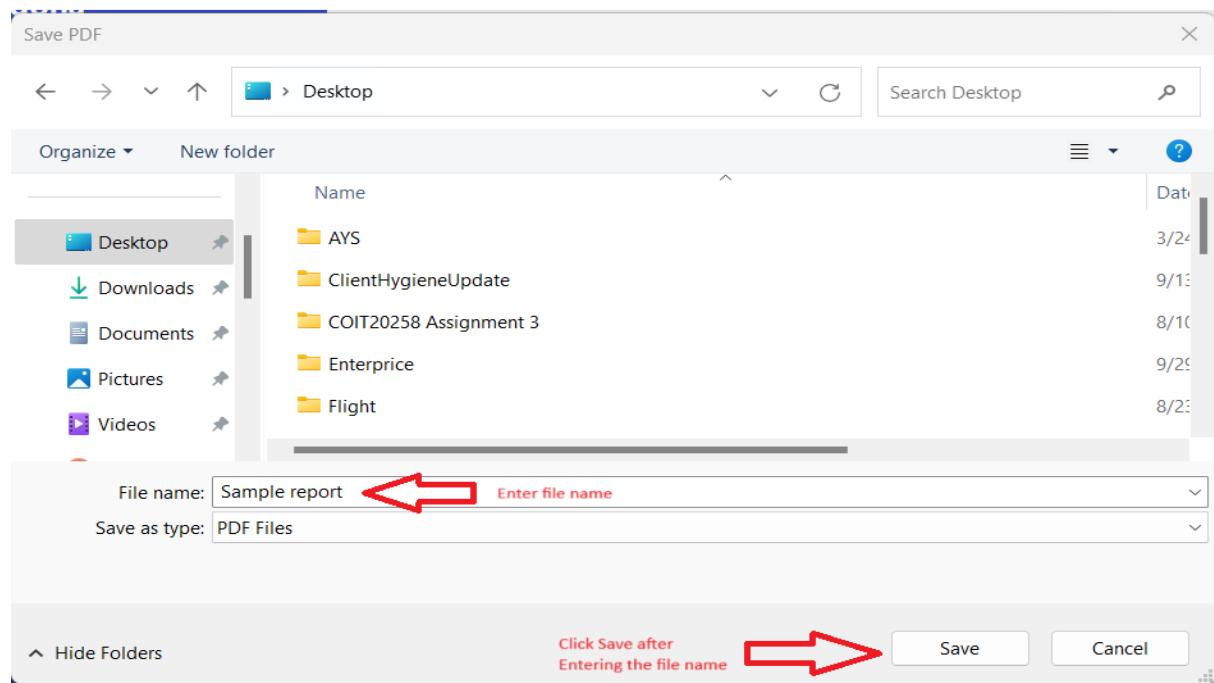
At the bottom of the main content area are "Extract" and "Print" buttons. The footer contains a "Need help?" link.

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

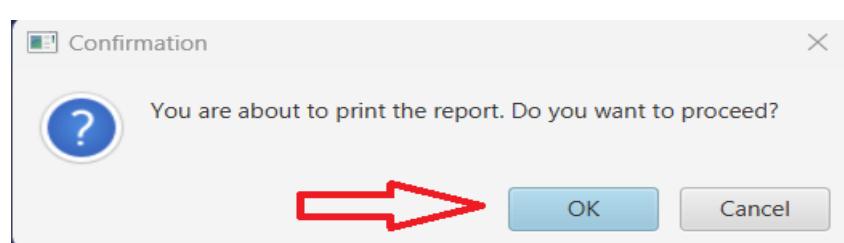
Reports

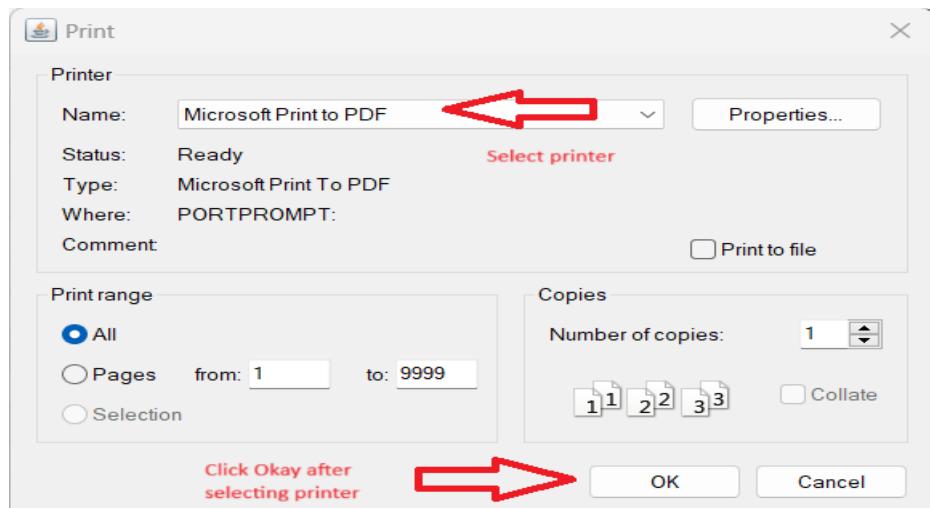
Logout

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 Administr... |                         |

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

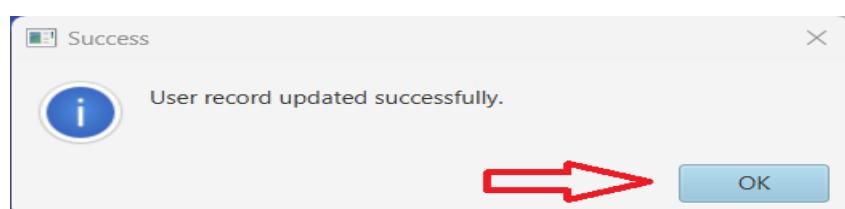
|                           |                         |
|---------------------------|-------------------------|
| User ID: 10010            | Emp ID: 12345           |
| First Name: Megan         | Last Name: Fox          |
| Birthday: 10/3/2003       | Zip Code: 1234          |
| Address: Fake St  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

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... |            |                  |

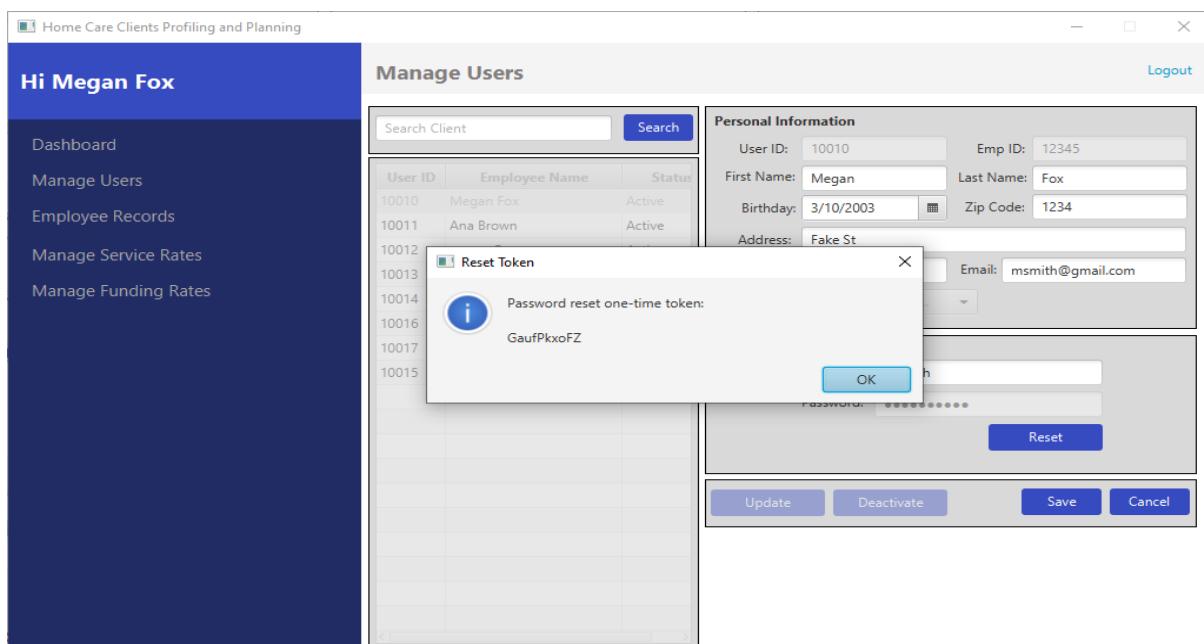
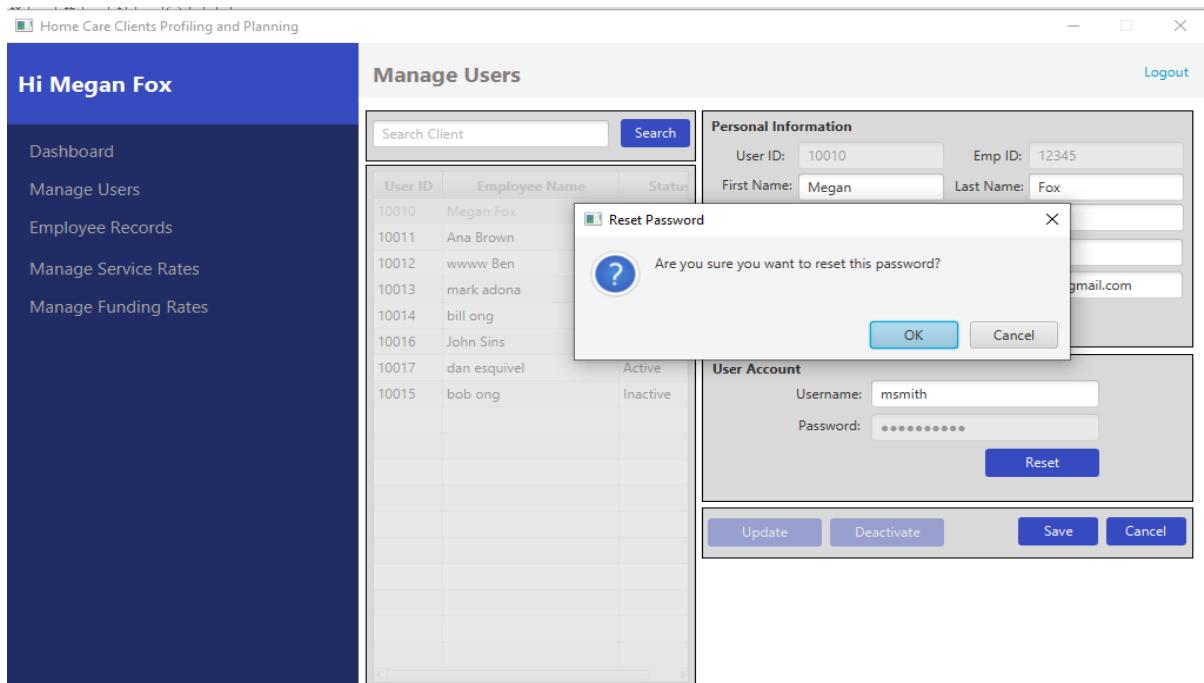
User Account

|           |        |
|-----------|--------|
| 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.



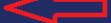
- Employee Management**

- 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:

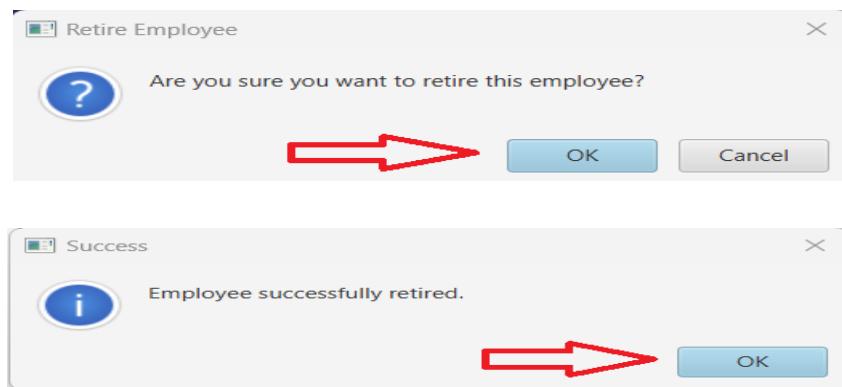
Start Date:

**Bulk Upload Employee Data**

**Choose File**

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

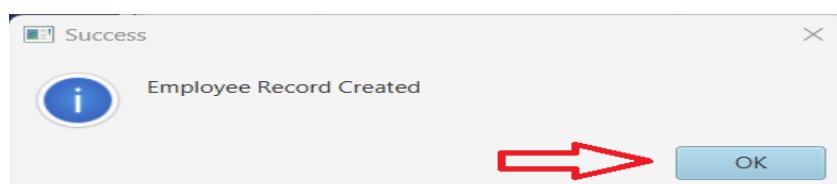
**Save** **Cancel** **Upload** **Cancel**



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'.

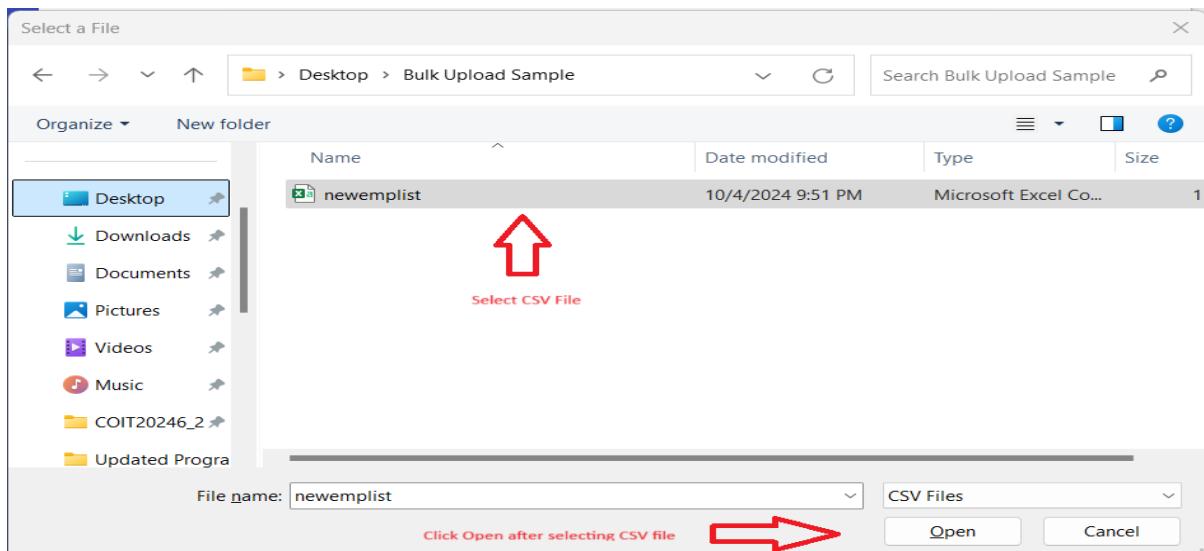


3. To import an alphalist, click on the Bulk Upload Button, this will allow uploading of a CSV file that contains employee record. Follow the on-screen instructions of choosing a file then click on upload. Confirm the data from the new window.

The screenshot shows the 'Manage Employee Records' interface. At the top, there's 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. The 'Bulk Upload Employee Data' section below it contains fields for Employee ID, Employee Name, and Start Date, along with a 'Choose File' button and a note about accepting only CSV files. At the bottom 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' interface. The Bulk Upload button is highlighted with a red arrow. A second red arrow points down to the 'Choose File' button in the 'Bulk Upload Employee Data' section, indicating where the user should click to select a CSV file.



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:

Bulk Upload Employee Data

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

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

Save Cancel Upload Cancel

Employee Data

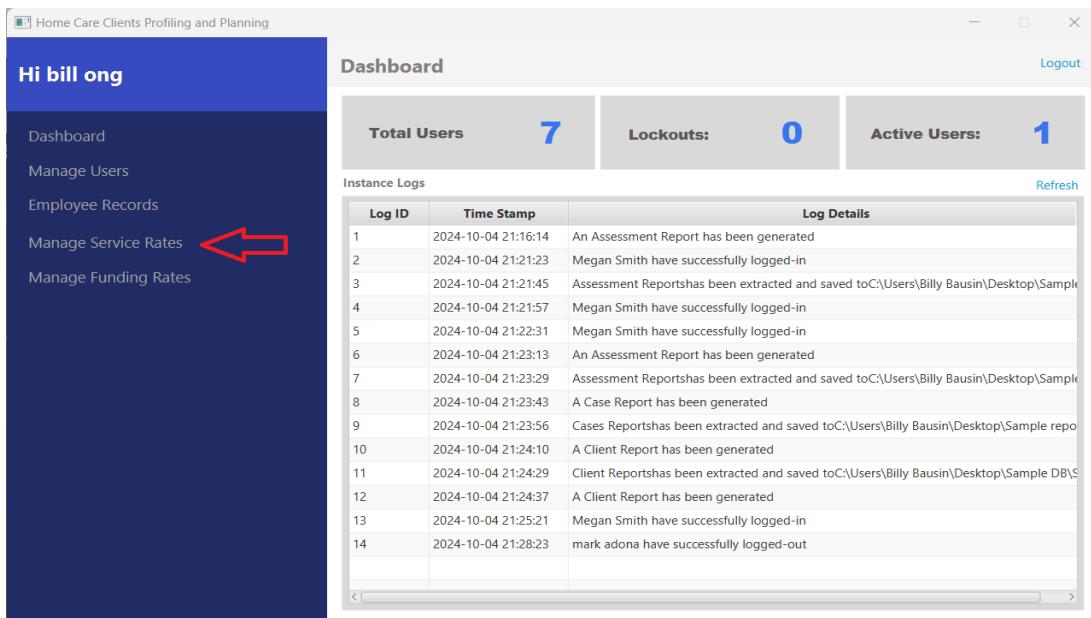
Employee List Bulk Upload

|  |
|--|
| 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

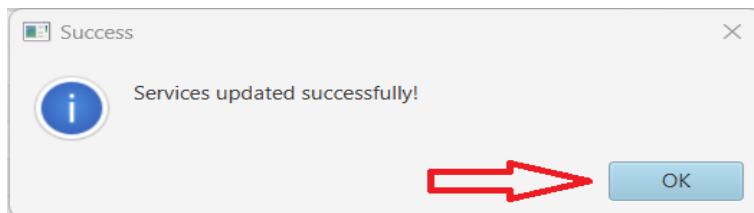
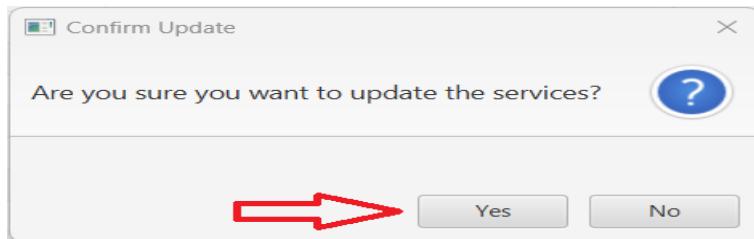
## Services Cost Adjustments

| 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 application dashboard. The left sidebar shows 'Hi bill ong' and a list of menu items: Dashboard, Manage Users, Employee Records, Manage Service Rates, and Manage Funding Rates, with the last one highlighted by a red arrow. The main area is titled 'Dashboard' and shows statistics: Total Users (7), Lockouts: (0), Active Users: (1). Below is an 'Instance Logs' table with 14 entries. A red arrow also highlights the 'Manage Funding Rates' menu item in the sidebar.

| 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**

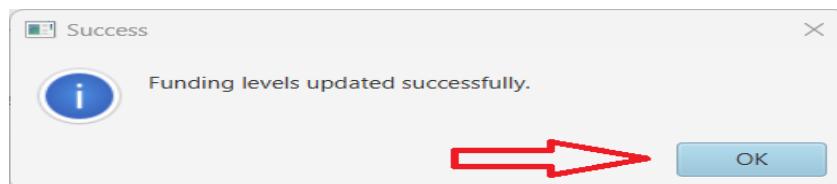
## Funding Level Adjustments

| 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.