Respitrack User Manual

For Clients

Revised: Feb 23, 2015

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Conventions and Common Features

References to Web Pages, Menus, Buttons, Tab sheets, Fields (for data entry) are shown in **Boldface**.
References to Links on Web Pages are shown in *Italics*.
References to keys on keyboard are shown in Brackets: <TAB>, <ENTER>

To enter data in a field: Position the cursor in the field box and type the data.

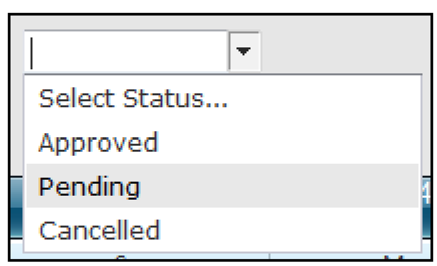
To move to the next field of data: Press <TAB> on the keyboard or position the cursor with the mouse.

To select a Command Button, Web Page Link, or Menu: Click once on the item.

To Right-Click on an element on the Web Page: Position the mouse on the element and use the mouse button on the right side of the mouse.

To select an item from a Drop Down box: Click on the arrow pointing down on the right side of the drop down box to locate the item.
Or
From the text box, start to type the information that you wish to select.

Then from the list or partial list, click on the item you wish to select.



Login and Passwords

Using a Web Browser, find the website for the Respitrack program

1. At the **Login** Screen, enter the **Username** assigned to your account.
   This Username is case sensitive.
2. Press the <TAB> key on the keyboard or mouse to the next field: Password
3. Enter the **Password** assigned to your account.
   The Password is case- sensitive.
   For example: **<u>Boxcar55</u>** is not the same as **<u>BOXCar55</u>**
4. If you wish to save this username for the login, click on box in front of *Remember Login*.
5. Click on the **Login** button. The **Home** page will be displayed.
6. If you have forgotten your password, click on the link *Retrieve Password*.
   A dialog box will appear requesting your username. The Respitrack system will send an email to your registered email account with the current password.

Schedule

My Calendar

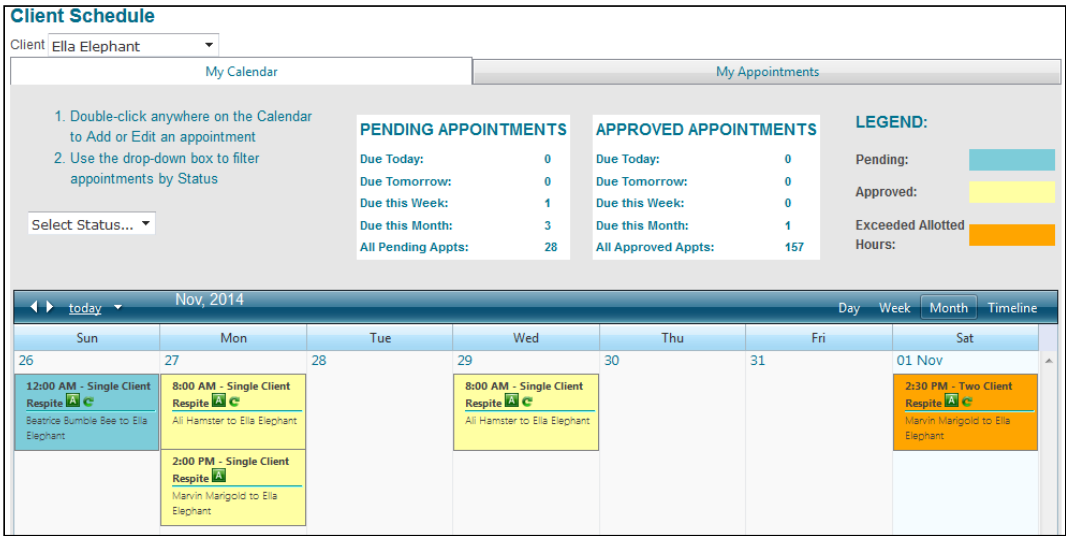
The Client schedule can be viewed in a variety of calendar formats (Day, Week, Month and Timeline) in the **My Calendar** tab sheet. The monthly view is the most commonly used one.

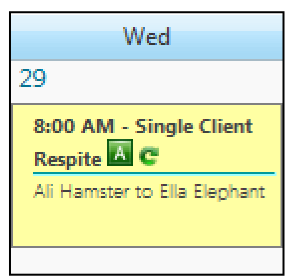
The schedule for a client will list Pending appointments (which have been scheduled, but not yet approved) in the calendar date. These appointments will appear in Blue.
Pending Appointments that Exceed the Allotted Hours will appear in Orange.

The Approved appointments will appear in Yellow.

Statistics about the Pending and Approved Appointments will provide counts for appointments in various categories (Due Today, Due Tomorrow, etc.)

The display of appointments can be filtered to view appointments by Status (Approved, Pending, or Cancelled)





The data in the Month view of the Schedule will display:

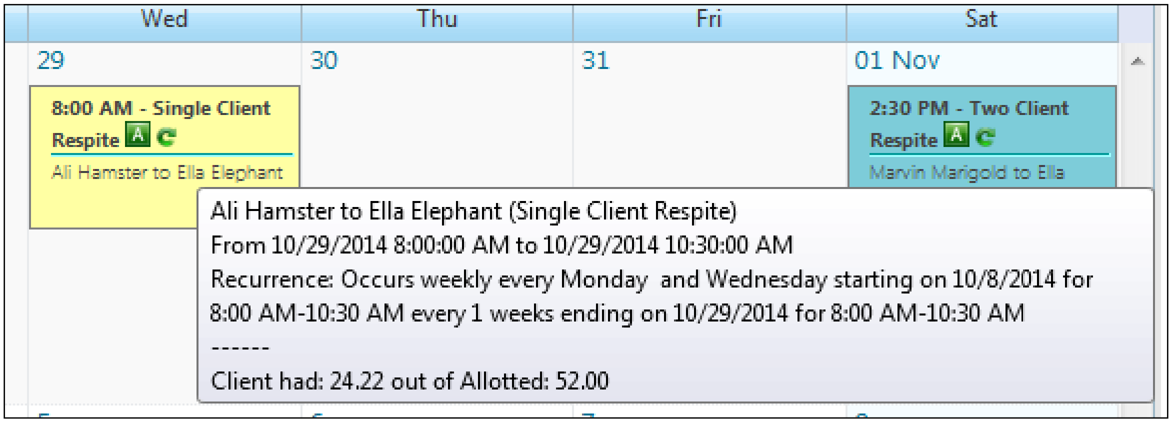
- The Start Time for the Appointment,
- The type of service (Single Client for example).
- An icon of an “A” indicates the appointment was created by an Administration staff member.
- An icon of an “E” indicates the appointment was created by an Employee/Caregiver.
- An icon of a “C” indicates the appointment was created by a Client.
- An icon of a green arrow circling clockwise indicates the appointment is recurring (scheduled appointments that automatically repeat at fixed intervals)
- The name of the Employee/Caregiver providing services and
- The name of the Client receiving services.

To view the History of an Appointment, Right-Click on the appointment and select **History**. The History will list information concerning the original creation of the appointment and any other changes that have been made to the appointment.

Additional information on the appointment is available when the mouse pointer rests on the data in the Calendar view.

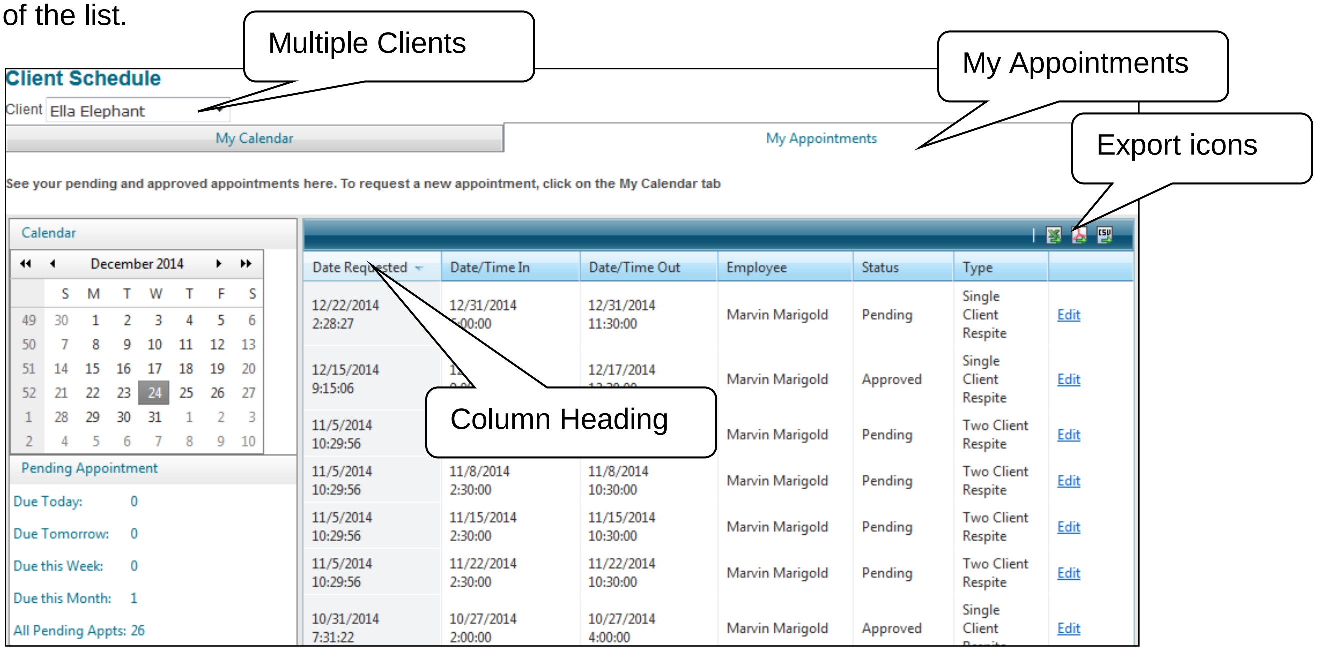
This information will include the start and end date and time for the appointment and the current status of Used and Allotted hours for the provided service.

In addition, if the appointment is a recurring appointment, details about the recurrence will be stated.



My Appointments

A list of all client appointments is available in the **My Appointments** tab sheet. The list is arranged in chronological order, but can be sorted so that the latest date is displayed at the top of the list.



To change the sort list for the appointments:

1. Click on the Column Heading, Date Requested.
2. An arrowhead will appear to the right of the text in the Column Heading. Click on the arrowhead to sort Descending (which will arrange the dates from the newest to the oldest)

To print a list of the appointments:

1. Select the icon for Exporting the file - either Excel (if your computer has the program Microsoft Excel) or Adobe PDF (available on most computers)
2. At the opening dialog box, select to **Open** the report or to **Save** the file and click on **OK**.
3. The list of appointments will appear on the screen with the appropriate computer program.
4. The list can then be saved or printed for your reference.

To return to the Calendar view, click on the **My Calendar** tab sheet.
To return to another Web Page, click on the **Menu** buttons at the top of the screen

Client Families that have additional clients participating in Respitrack, can switch to another client to view the schedule for that individual, by selecting that client in the **Multiple Client** drop down box.

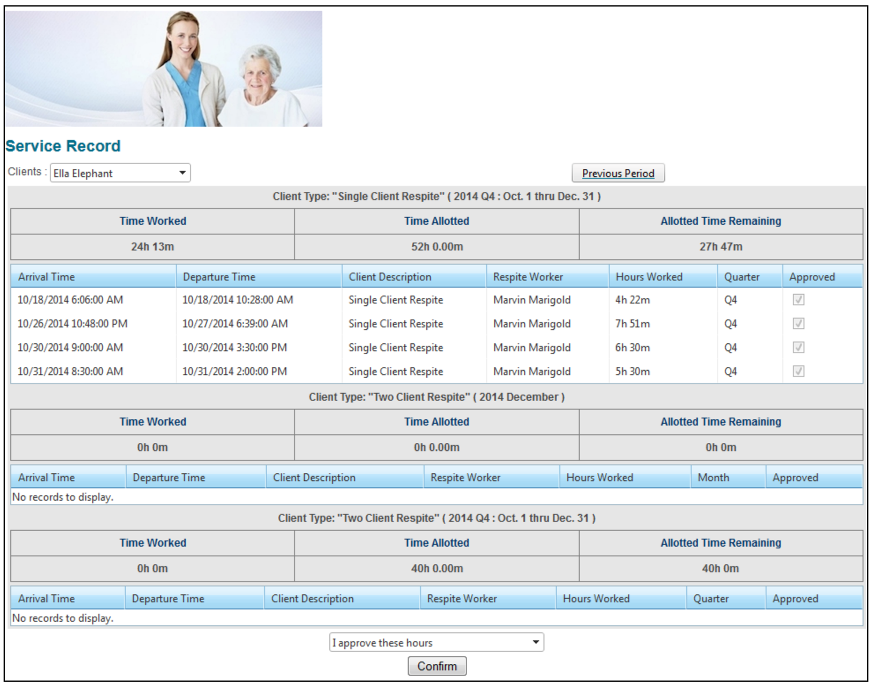
Client Service Record

A record of completed client appointments is displayed in the **Client Service Record**.

The information is displayed for the **Current Period** of Authorization. The Previous Period of Authorization is available by clicking on the **Previous Period** button.

Grouped by the Type of Service, the page displays the Time Worked, the Time Allotted and the Allotted Time Remaining.

Below the summary of the time, there is a list of completed appointments for the type of service. This listing displays the date and time of the appointment, the type of service, the Employee/Caregiver that provided the service, the hours worked, the Authorization period (Quarter 4, December, etc.) and an Approval checkbox.



Service Record

Clients : Ella Elephant

Previous Period

Client Type: "Single Client Respite" (2014 Q4 : Oct. 1 thru Dec. 31)

Time Worked	Time Allotted	Allotted Time Remaining
24h 13m	52h 0.00m	27h 47m

Arrival Time	Departure Time	Client Description	Respite Worker	Hours Worked	Quarter	Approved
10/18/2014 6:06:00 AM	10/18/2014 10:28:00 AM	Single Client Respite	Marvin Marigold	4h 22m	Q4	☑
10/26/2014 10:48:00 PM	10/27/2014 6:39:00 AM	Single Client Respite	Marvin Marigold	7h 51m	Q4	☑
10/30/2014 9:00:00 AM	10/30/2014 3:30:00 PM	Single Client Respite	Marvin Marigold	6h 30m	Q4	☑
10/31/2014 8:30:00 AM	10/31/2014 2:00:00 PM	Single Client Respite	Marvin Marigold	5h 30m	Q4	☑

Client Type: "Two Client Respite" (2014 December)

Time Worked	Time Allotted	Allotted Time Remaining
0h 0m	0h 0.00m	0h 0m

Arrival Time	Departure Time	Client Description	Respite Worker	Hours Worked	Month	Approved
No records to display.						

Client Type: "Two Client Respite" (2014 Q4 : Oct. 1 thru Dec. 31)

Time Worked	Time Allotted	Allotted Time Remaining
0h 0m	40h 0.00m	40h 0m

Arrival Time	Departure Time	Client Description	Respite Worker	Hours Worked	Quarter	Approved
No records to display.						

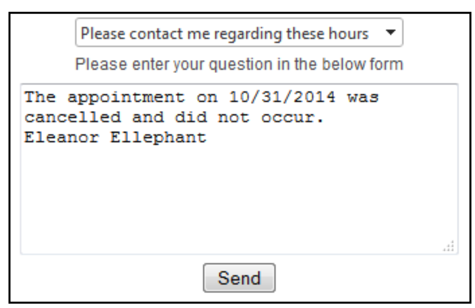
I approve these hours

Confirm

You can verify the provided services, by clicking on the Approval checkbox next to each completed appointment and select the option: <u>I approve these hours</u>, then click on the **Confirm** command button.

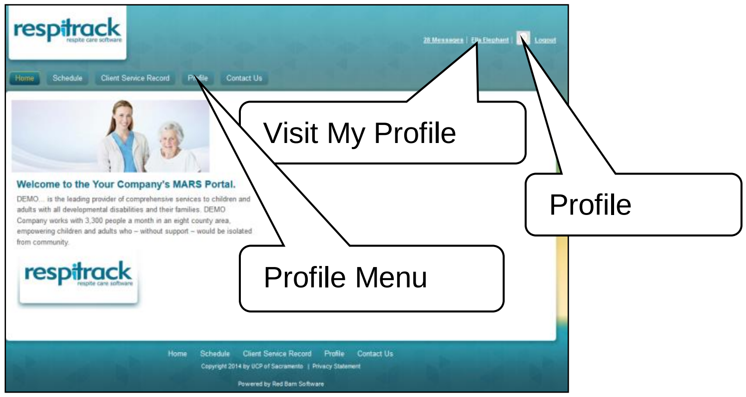
If you have questions regarding the services, select the option: <u>Please contact me regarding these hours</u>.

In the text box that appears, type in your concerns/questions then click on the **Send** command button.

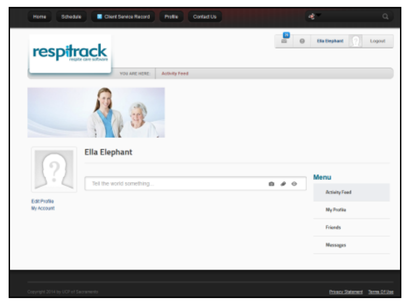


Profile Information

Information about you which includes activity feed, my profile (your credentials, password, location), friends, and messages. There are several screen pages connected with your Profile and several methods available to access these pages.



To access the Profile pages from the links in the upper right corner of the website (Username: Visit My Profile or image/photo of person: Profile Avatar)

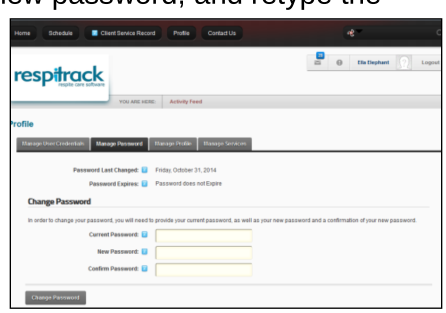


1. Click on the *Username* or *Profile Avatar* in the upper right corner of the website.
2. The **Activity Feed** has a field for you to enter information that you wish to share with other users of the system. In additional to text, you can add photos and attachments and set the privacy level for who you wish to share this information (Everyone, Community Members, Friends or Private.)
3. Click on the **Edit Profile** or **My Account** to view information in *Manage Profile*. This includes information on your name, address, phone numbers.
   If you find errors or incomplete information, you can edit or add information.
   To the right of each field of data, you can click on the icon and set the privacy for the information. The choices are: Public, Members Only, Admin Only, and Friends and Groups.

4. The Profile **Tab sheets** have information on Manage User Credentials, Manage Passwords, Manage Profile and Manage Services.

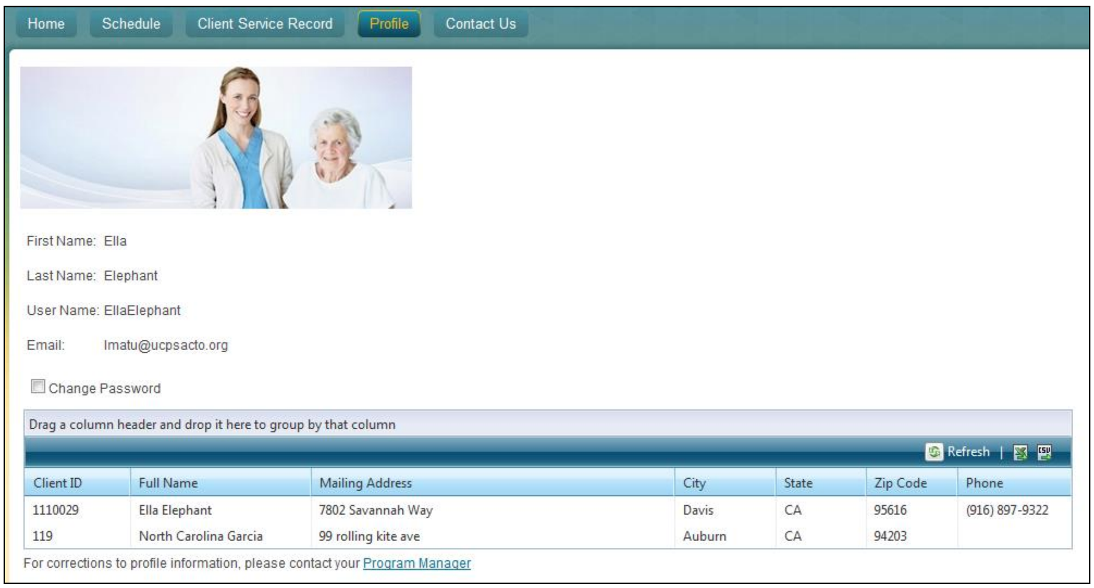
To change your password, click on the tab sheet heading *Manage Passwords*.

a. Type in the current password, then type in the new password, and retype the new password to confirm that entry.
b. Click on the button *Change Password*.



To access the Profile from the Profile Menu

1. From the Menu list on the current Web Page, select **Profile**
2. The **Profile** page will list information on the current user such as: First Name, Last Name, User Name, Email, etc. This information is Read-only. If you notice any errors, contact your support personnel to correct the errors.
   The User Name field cannot be changed.
3. A checkbox is available to change the current password.
   With this checkbox selected, you can change your current password.
   In the dialog box, type in a new Password, Confirm the New Password and the Click on **Update Password** to make the changes to your password.
4. The client listing will display address and phone number information for the client.
   For clients with additional siblings that participate in programs, those related clients will also be listed.

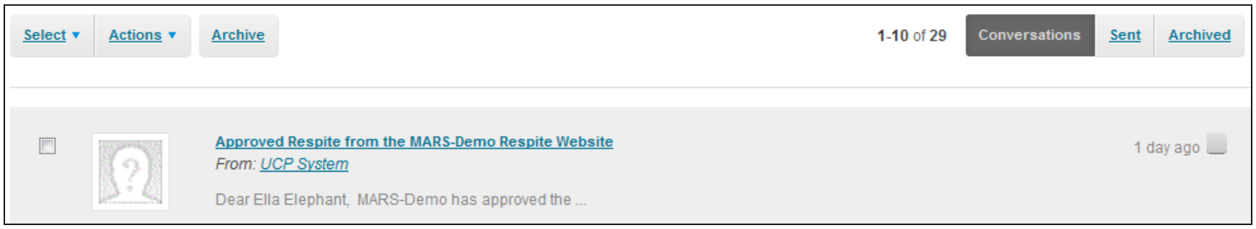


To return to another Web Page, click on the **Menu** buttons at the top of the screen

Messages

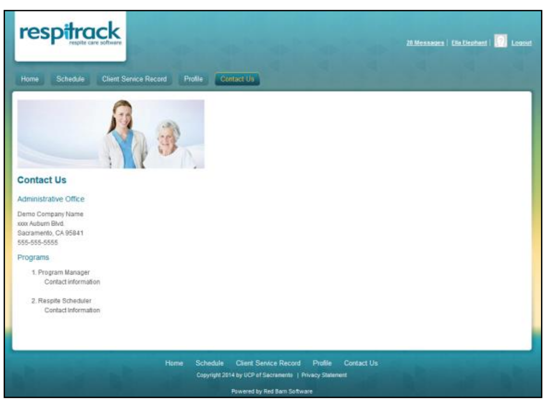
System messages can be viewed in the **Profile** Web Page. You can view messages using any of the following:

the **Profile** menu or
Message Icon (envelope in the upper right corner
My Profile (from the user name in upper right corner) or
the Profile Avatar



1. Messages from the website appear on the **Profile** page.
   You can view/read messages you received, view/read sent messages, and archive messages.
   Messages can be selected by using the checkbox to the left of a message or by using the **Select** button to select: All, None, Read, Unread messages.
2. Selected Messages can have **Actions** applied to them. The actions include: Mark as Read, Mark as Unread, and Archive.
3. Messages can be archived by selecting and applying the Action: Archive. This will reduce the listings of Current Messages (Conversations).
   Archived Messages can be viewed by filtering for Archived Messages.

Support and Contact Information



From the Menu list on the current Web Page, select **Contact Us**

Information on the Administration staff contact and available Programs will appear on the **Contact** page.

The list will include address, and/or email addresses, and/or other contact information.