



GENERATIONS®

Homecare System




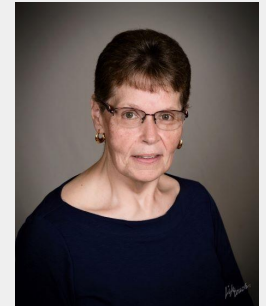
Presenter



Customer Success Manager

Lynne Ingraham

 lynne@homecaresoftware





Topic:

What is Document Management?

A secure way to share...

- **...important policies/procedures with your field staff (caregivers)**
- **...policies/procedures/documents with your clients, AND**
- **use as a central repository of documents for your in-office staff**

Great for...

- **Caregivers**
 - **Policies & procedures**
 - **In-service documents**
 - **Written Reviews**
- **Care Recipients (Clients)**
 - **Procedures (how to request schedule changes, how to see their schedules, how to see caregiver biographies)**
 - **Signed Service Agreement**
- **Administrative Teams**
 - **Remote Work Policies**
 - **COVID-19 Fact Sheet from the CDC**
 - **On-call schedule**

The Basics

- You upload items in Generations, and
- Specify who can see them
- Caregivers, clients, and/or office staff login via the mobile app or mobile site (mobile.idb-sys.com) and they can read those items that have been shared with them
- You can see which items have been opened by clients & caregivers

Sharing General Documents with Caregivers & Clients






















GENERATIONS
Homecare System

Welcome Lynne
Adjust Resolution | Logout

Home Dashboard Clients Caregivers Schedule Timesheets Interfaces Telephony Reports Admin Caregiver Search Call Center Help





Shift Requests 1 Messages 0 Alerts 1 Notifications 39 Active Users 1

The GenSuccess Agency

 Clients	 Potential Client	 Service Codes	 Document Management	 Referral Sources	 Dashboard	 Help
 Caregivers	 Applicant List	 Schedules	 Telephony	 Caregiver Search	 Mapping	 Call Center
 Create Timesheet	 Edit Timesheet	 QuickBooks	 Billing Export	 Payroll Export	 Payers	 View All Reports

Copyright 2020 Integrated Database Systems, Inc. | Server:34 | Privacy Policy













Last Backup: 04/06/2020 11:18:00 AM (0 day(s) Size: 598.81 MB)

+ New	Folder Name	Description	Created By	# of Files
 	Caregiver General Documents	Documents added to this folder will be available to caregiver using the mobile app	Generations	4
 	Client General Documents	Documents added to this folder will be available to client using the mobile app	Generations	4

- Caregiver and Client General Documents folders cannot be deleted
- You can add as many additional folders as you need

Caregiver General Documents

Documents added to this folder will be available to caregiver using the mobile app

+ New	File Name	Description	Class	Updated By	Last Updated
  	CDC-247-Response-to-COVID-19-fact-sheet.pdf	Covid-19 Fact Sheet			
  	DocumentManagement1.docx	Policy Re: Holiday & Vacation Pay		Lynne	04/09/2020 04:41 PM
  	EmployeePolicy101.docx	Policy Re: In-Services			
  	RevisedCOVID-19ScreeningQuestionnaire3-19-2020.pdf	Screening Questions			

Close

Open the General Documents folders to see the files you have uploaded. Once the folder is open, click the “+New” button to upload a new document.

Each item uploaded to the folder can be shared with ALL caregivers or clients, or to those with specific Class or Locations assigned.

Caregiver General Documents

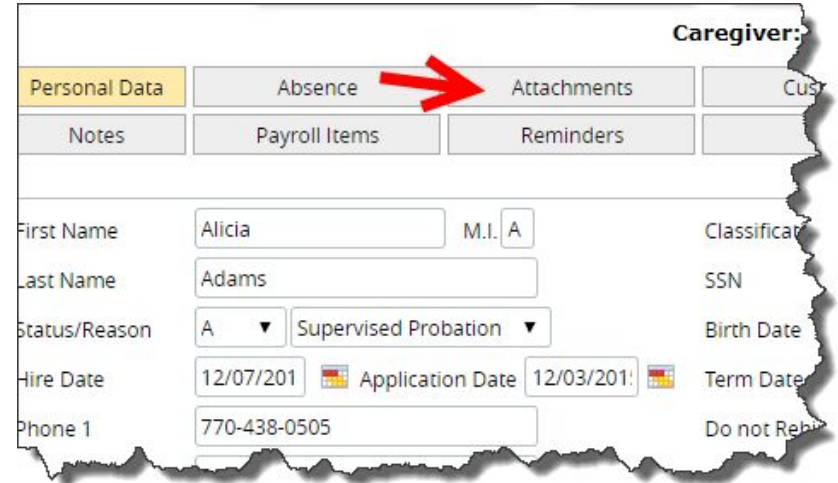
Documents added to this folder will be available to caregiver using the mobile app

File Name	Description	Class		
<input type="button" value="Choose File"/>	No File Chosen	<input type="text"/>	All Class ▼	<input type="button" value="Save"/> <input type="button" value="Cancel"/>
Maximum file size: 20 MB				

1. Browse to & select the file
2. Enter a description
3. Decide if all Classes (or Locations) will be able to view it, and
4. Save.

Sharing Documents with Specific Caregivers and Clients

If there are documents that you wish to only share with a specific caregiver or client, you can upload them to their Attachments tab.



The screenshot shows a user profile page with a navigation menu at the top. The 'Attachments' tab is highlighted with a red arrow. Below the navigation menu, the user's personal information is displayed in a form.

Caregiver:			
Personal Data	Absence	Attachments	Cust
Notes	Payroll Items	Reminders	

First Name	<input type="text" value="Alicia"/>	M.I.	<input type="text" value="A"/>	Classification
Last Name	<input type="text" value="Adams"/>			SSN
Status/Reason	<input type="text" value="A"/>	<input type="text" value="Supervised Probation"/>		Birth Date
Hire Date	<input type="text" value="12/07/201"/>	Application Date	<input type="text" value="12/03/201"/>	Term Date
Phone 1	<input type="text" value="770-438-0505"/>			Do not Rebl

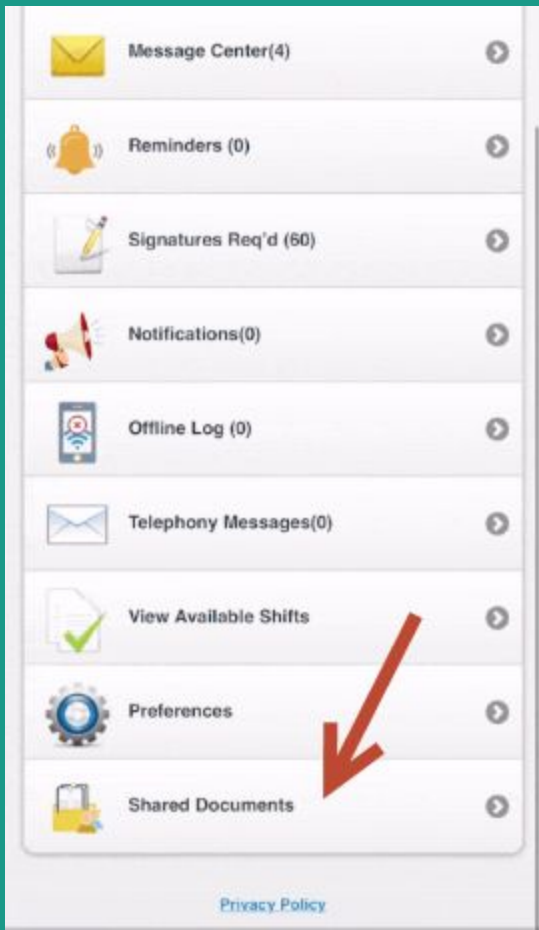
Sharing Documents with Specific Caregivers and Clients

Click the +New button, and upload the item.



Simply check the box to allow the person to have access to that item.





What Caregivers & Clients See

via mobile app OR mobile site
(mobile.idb-sys.com)

Shared Documents appears at the bottom of their home page



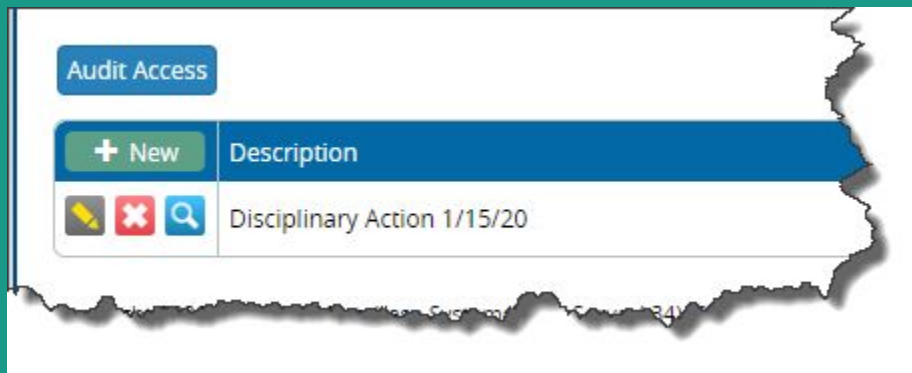
Caregivers

- View any items shared from their Attachments tab + Caregiver General Documents

Clients

- View any items shared from their Attachments tab + Client General Documents

How will I know if they've seen it?



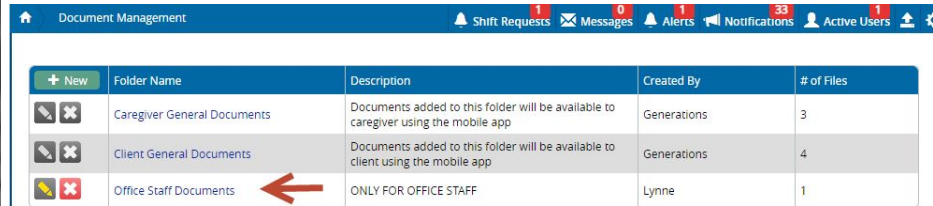
At the client or caregiver Attachments tab, you'll find a Audit Access button.

This will show you which items have been reviewed.








Audit Access	
Name	Accessibility
DisciplinaryActionReport.docx	Caregiver Attachemnt
EmployeePolicy101.docx	Caregiver General Documents
EmployeePolicy102.docx	Caregiver General Documents
CDC-247-Response-to-COVID-19-fact-sheet.pdf	Caregiver General Documents

Sharing Documents with Office Staff

You can add as many folders in Document Management as needed. Perhaps you'd like a central place to store all documents for your office personnel - such as work processes, remote work procedures, on-call schedule, etc.



The screenshot shows the Document Management interface with a table of folders. The table has columns for Folder Name, Description, Created By, and # of Files. A red arrow points to the 'Office Staff Documents' folder.

+ New	Folder Name	Description	Created By	# of Files
 	Caregiver General Documents	Documents added to this folder will be available to caregiver using the mobile app	Generations	3
 	Client General Documents	Documents added to this folder will be available to client using the mobile app	Generations	4
 	Office Staff Documents 	ONLY FOR OFFICE STAFF	Lynne	1

Office users will be able to view ALL items in Document Management - including Client & Caregiver General Documents.

How to Launch!

- Upload documents for caregivers & clients in Document Management
- Upload any client- or caregiver-specific documents at their Attachments tab.
- Make sure you have enabled web-access for caregivers and clients via the Web Portal tab in Company Settings
- Ensure that individual clients & caregivers are web-enabled - and they know how to login via the app or mobile site
- Use the **Message Center** to get a message out to all caregivers - and **Letter Writer** to send out an email or letter to all clients - regarding the launch of Document Management
- Review the Audit Access at the individual client or caregiver Attachments tab to see which items have been opened.

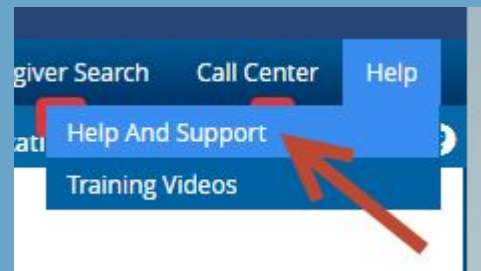
Questions?

Need assistance?

Contact support using Live Chat (M-F 9-5 EST)

- Available from the Help area in Generations, or from
- www.idb-sys.com OR www.homecaresoftware.com
- Email: support@idb-sys.com
- Phone: 989-546-4512

For emergency after-hours support - reach our on-call staff at 989-546-4512 x1





HomecareSoftware.com | Reach us via LiveChat

 info@homecaresoftware.com

989-546-4512

 [@GenerationsHCS](https://www.facebook.com/GenerationsHCS)

 [@GenerationsHCS](https://www.twitter.com/GenerationsHCS)