

Family Portal Recap 2 – Logging in and Navigation of Tabs (Employee Guide)

Introduction

The following document walks you through how to login to the Family Portal as well as how to navigate the various tabs and what you will find within them. *Please adjust the points as needed based on your agency's specific Family Portal configuration and access you provide to users. Be aware of spacing changes, due to any edits you make.*

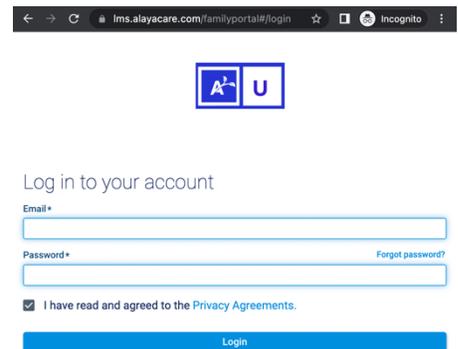
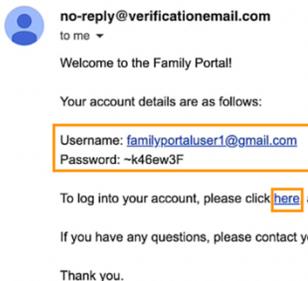
Logging into the Family Portal

When logging into the family portal for the first time a family portal user will follow the instructions on the “New User Email” sent to them.

The email will contain their **username** and **temporary password**. The email also contains a link to their family portal login website. This URL is structured as the name of the agency .alayacare.com, or .ca, slash family portal.

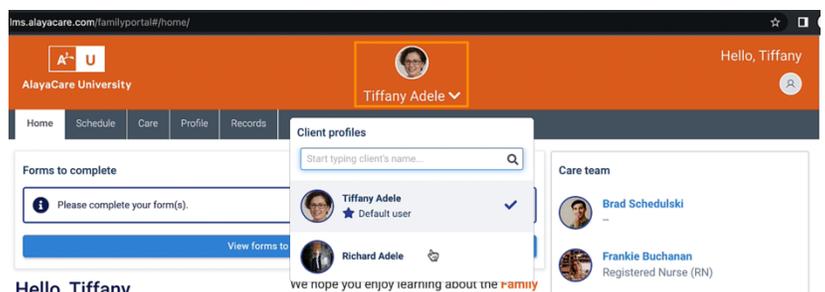
- E.g: agencyname.alayacare.com/familyportal

[AlayaCare] - Your new Family Portal user Inbox x

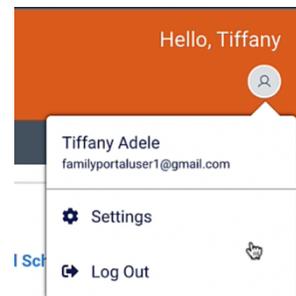


Upon first login the user will enter the temporary password and be prompted to **change their password**. Once they have done so they will be logged into the account.

If the user has access to more than one family portal profile, they will be asked to **select a default profile**. A user can easily switch between profiles by selecting the clients name at the top of the page and **toggle** between profiles.



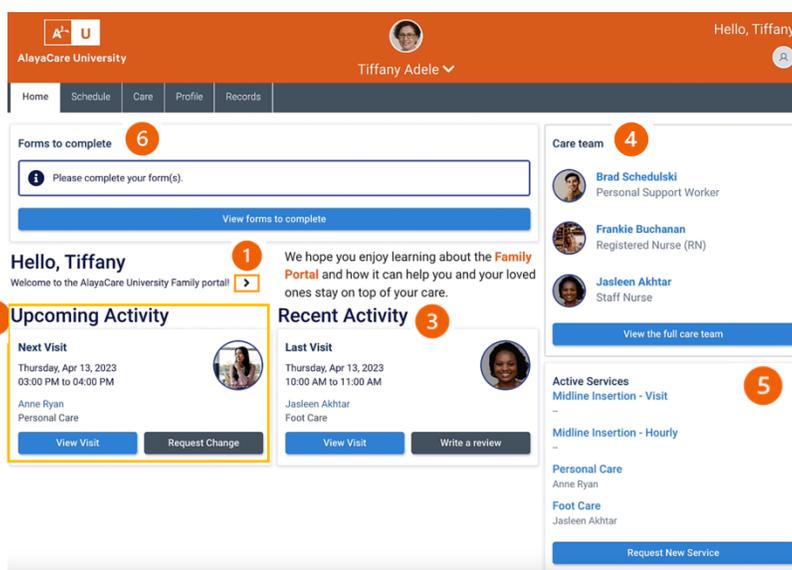
Users can click on the **profile icon** in the top right corner to either **logout** of the family portal or access the **settings**. Via the settings users can review their **personal information** as well as **change** their family portal login password.



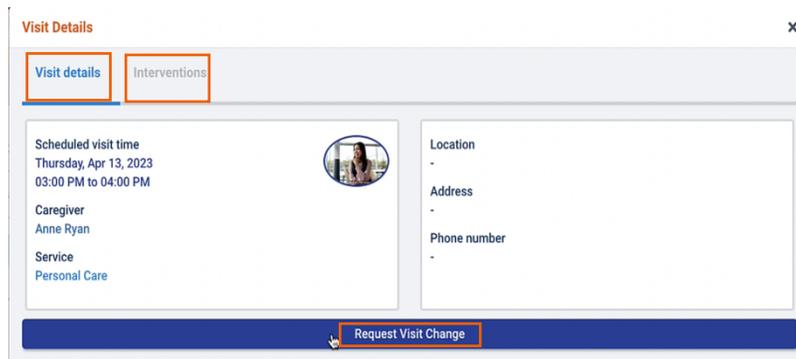
Under the “Set Primary Patient dropdown” users can review which client profiles they have **access to on the family portal** and change who they would like their default user to be, if desired.

Navigating the Family Portal Home Screen

1 Once a user logs into the family portal, they are presented with the **home screen**. Users will be greeted to the family portal and be able to read the **welcome messages**. These are the **agency descriptions** that were configured in system settings. By clicking on the arrow, the **long description** can be viewed as well.



2 The user can see any **upcoming activity**. The type of service and the date/time are indicated. You can **select “view visit”** to see further **visit details**. The **interventions** tab can be selected to see what will be performed during the visit. If enabled, the user can also **request a change for the visit**.



The request type can either be a **time or date change** or a **cancellation**. A **note** can be left to allow the user to explain the reason for the change.

Request Visit Change

Visit starting at 03:00 PM Thursday, April 13th 2023

Request type **

Visit Date/Time Change

Visit Cancellation

New visit date* 2023-04-16

New visit start time* 03:00 PM

Must be between or equal to 2023-04-15 and 2023-05-13

Note

Can we please move the visit to April 16th at 3:00pm.

Cancel Submit request

3 The user can also see **recent activity**. Here they can see **when the last visit for this client was**. They can click on **“view visit”** to see further **visit details**. They can also leave a **review** for the caregiver associated with this visit.

Recent Activity

Last Visit

Thursday, Apr 13, 2023
10:00 AM to 11:00 AM

Jasleen Akhtar
Foot Care

View Visit Write a review

4 To the right of the home screen, users can see the **client’s care team**. Under each employee’s name, their **job title** will be indicated (if it was filled out on their employee demographics page). A user can select **“View the full care team”** to view more details about the care team.

Care team

- Brad Schedulski**
Personal Support Worker
- Frankie Buchanan**
Registered Nurse (RN)
- Jasleen Akhtar**
Staff Nurse

View the full care team

Here, users will be able to **see all caregivers that belong to a clients care team** along with information such as their **specific skills**.

AlayaCare University Hello, Tiffany

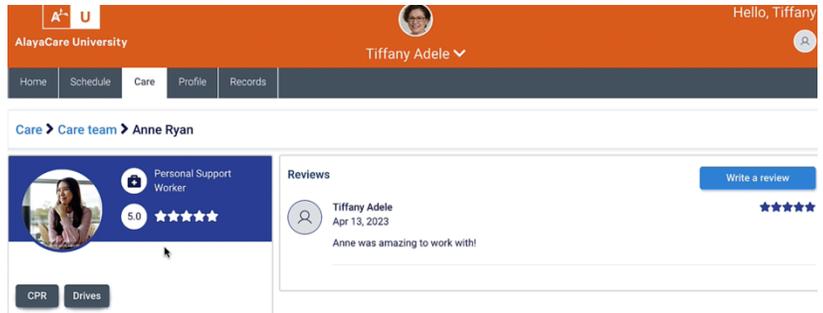
Tiffany Adele

Home Schedule Care Profile Records

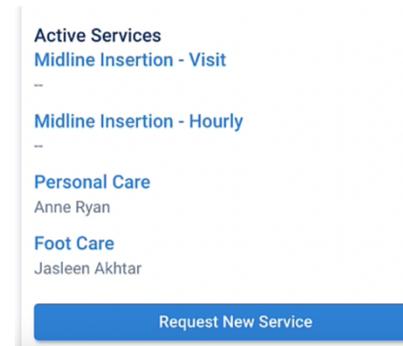
Care > Care team

- Brad Schedulski**
Personal Support Worker
★★★★☆
View Profile
- Frankie Buchanan**
Registered Nurse (RN)
★★★★★
Dementia Care - Behavioural Support Training Program (BSTP)
Immunization - Hepatitis B (RPN/RN Only)
First Aid
View Profile
- Jasleen Akhtar**
Staff Nurse
★★★★★
Drives German French Registered Nurse
View Profile

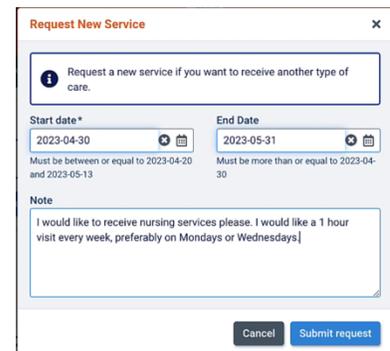
Click on “view profile” to view more information about a specific caregiver. Here users can write a review. The review will be shared with the agency but not with the caregiver.



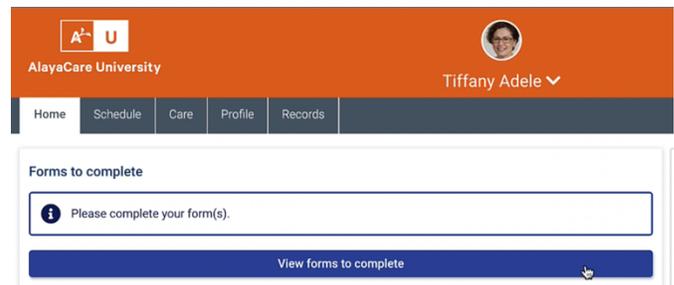
5 Users can also see what **active services** the client has. If there is a **primary caregiver** assigned to that service, the **employee’s name will be listed** under the name of the service. If you click onto the service name you will be able to view further details.



A new service can be requested by clicking on the “request new service” button.



6 The last area to discuss on the home screen is the **Forms to Complete** section. Users can complete family portal type forms and submit them to the agency.



Click on **“View forms to complete”** to view which forms are available to fill out. Select the **“complete”** button to fill out any form listed in the dialogue.

Forms to complete

| Form | action |
|------------------------------|----------|
| Family Portal Signature Form | Complete |
| Visit Form | Complete |
| Daily Form | Complete |

Navigating the Family Portal Care Tab

The family portal’s care tab stores a lot of the same information as the home tab does.

Vitals, care team, active services, and medications can be accessed via the care tab.

1 A client’s vitals can be viewed via the care tab.

Click on **“view records”** to see recorded readings of that vital for the client.

Click on the **graph icon** from the care tab to see all the **vital readings in graph form** mapped over time.

The screenshot shows the 'Care' tab interface for a client named Tiffany Adele. The 'Vitals' section includes four cards: Blood oxygen (94%), Temperature (37 °C), Weight (68.04 kg), and Blood pressure (120/-- mmHg). Each card has a 'View Records' button. The 'Medication' section shows '9 Active Medications' with a 'View Medications' button. On the right, there is a 'Care team' list with members Anne Ryan, Jasleen Akhtar, and Rollee Holden, and a 'View the full care team' button. Below that are 'Active Services' and 'Personal Care' sections.

2 A client’s medications can be viewed from the care tab.

Click on **“view medications”** to see the **full list of active medications** the client is taking. This displays the name, route, dosage, date of last administration, time instructions for administration, and status of the medication.

Click the **name of the medication** to view **further details** start and end date, and any special instructions.

The screenshot shows the 'Medications' list under the 'Care' tab. It features a table with columns for Name and Strength, Role, How to take, What to take, How Often, Last Taken, and Next Dose. The list includes several medications such as Acetaminophen, Advil, Albuterol Sulfate, aMILoride-hydroCHLOROthiazide, Benadryl, and Diazepam.

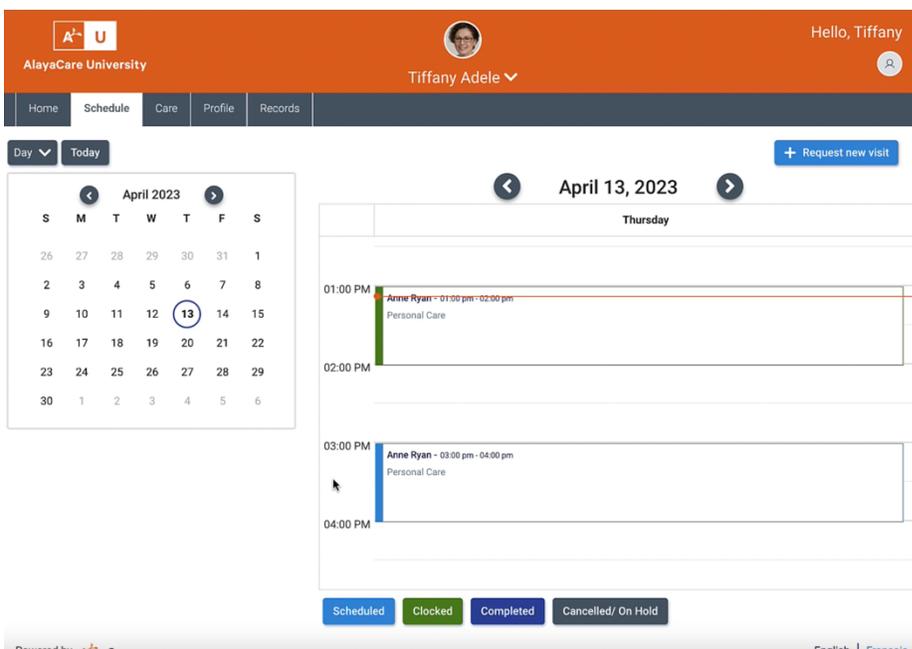
| Name and Strength | Role | How to take | What to take | How Often | Last Taken | Next Dose |
|---|-------------------|-----------------|------------------|-------------------|------------------------|-------------------|
| Acetaminophen - 325 mg | Patient or Family | PO - Oral | 1 Cap | Daily | - | Today at 09:00 AM |
| Advil | Patient or Family | PO - Oral | 1 Cap | Daily | - | Today at 09:00 AM |
| Albuterol Sulfate - 108 (90 Base) | Care Worker | IN - Inhalation | 2 Puff(s) | BID - Twice a day | Jan. 17, 2024 11:35 AM | Today at 09:00 AM |
| aMILoride-hydroCHLOROthiazide - 5-50 mg | Patient or Family | PO - Oral | 1 Tablet(s) | Daily | - | Today at 09:00 AM |
| Benadryl | Patient or Family | PO - Oral | 50 mg | Stat | - | - |
| Diazepam (Anticonvulsant) - 10 mg | Care Worker | RE - Rectal | 1 Application(s) | Other - use note | - | - |

Navigating the Family Portal Scheduling Tab

The schedule tab in the family portal allows you to **view the client's schedule**, view the **status of visits** and **request new visits**, depending on your agency's settings.

There is a **legend** at the bottom of the page that indicates what the different colours mean about the **status of the visits**.

Looking at the visit in the schedule a user can see what **time** the visit is scheduled for, which **caregiver** will be completing the visit, and what kind of **service** will be provided.

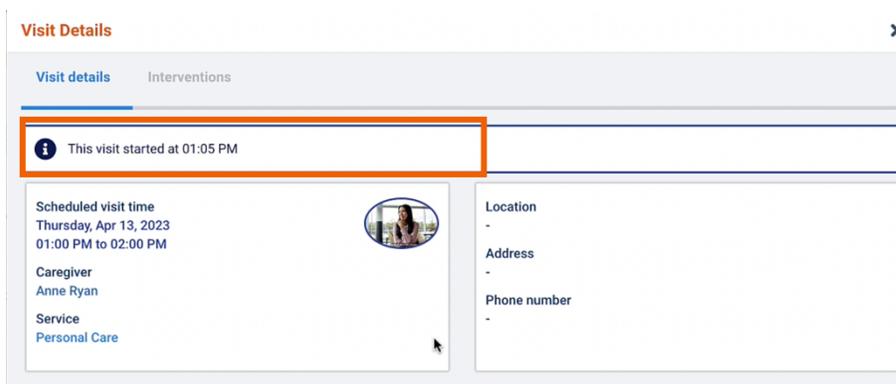


A user can click into the visit to view more details.

The **details** will **depend** on if the visit is in the past, on hold, cancelled, in progress, or upcoming.

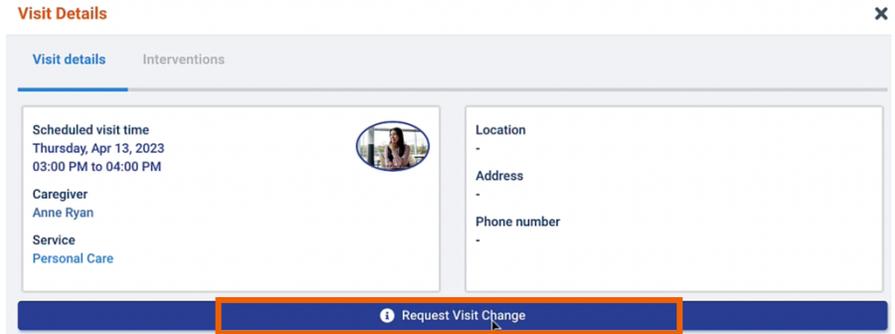
For instance, if your agency has the permission enabled, a user will be able to **see what time the caregiver clocked into the visit** if the visit's **status is in progress**.

Under the **interventions** tab users can see what interventions or ADLs will be completed during the visit.



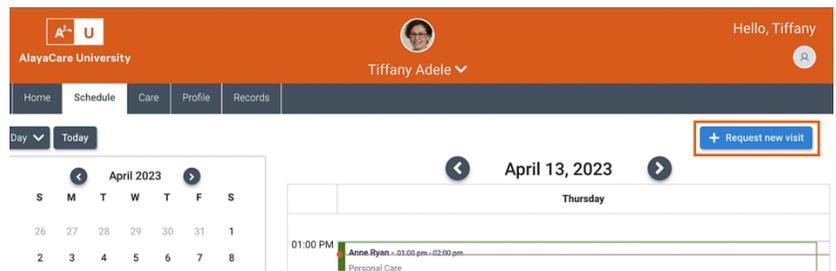
Additionally, users can request to **change an upcoming scheduled visit**.

Users can either **cancel** the visit or choose to **reschedule** it for a new date and time.

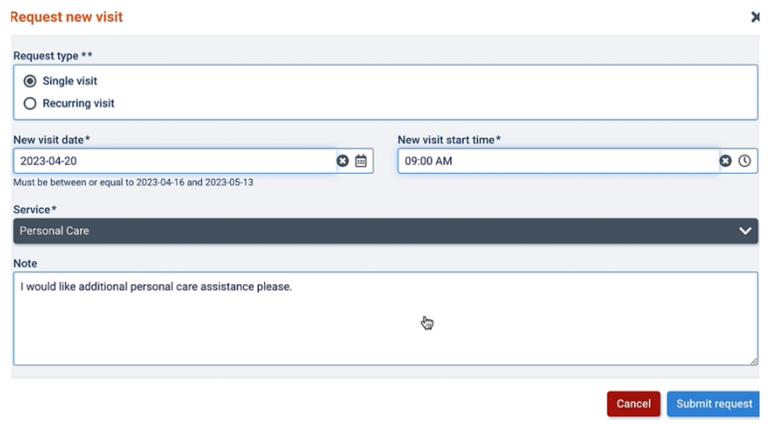


A user can also **request for a new visit to be added** to the schedule.

To do this, click on the **“request new visit”** button.



Users can select their request type. A **single** new visit can be requested or a **recurring** visit. Users can select from the dropdown what **service** this new visit will pertain to.

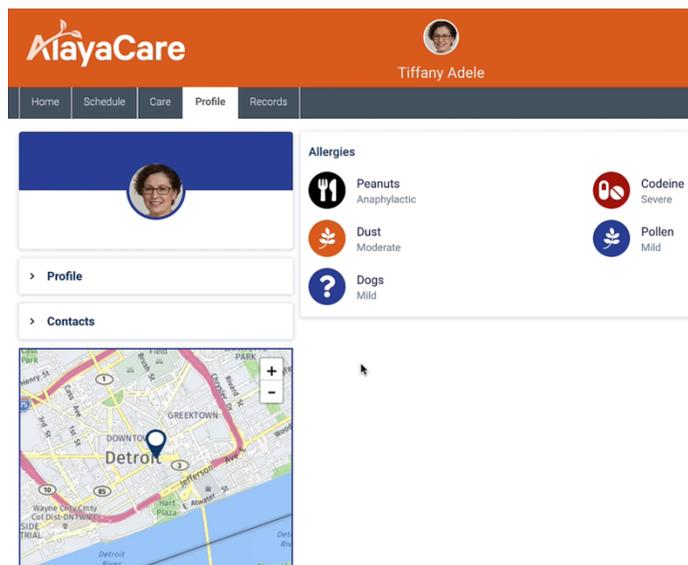


Remember, this is **just a request** and will **not automatically add visits** to the client's **schedule**. Clients should understand that requests will be **reviewed by the agency staff** and then **added as appropriate** and as available.

Navigating the Family Portal Profile Tab

Within the Family Portal **Profile** tab, users can view information pertaining to the client. This includes **allergies**, **demographic**, and **contact** information.

The **allergies** listed here come from the **client's medical history** section in the AlayaCare web app. The **icon** indicates the **category of allergy**, the options being food, medication, environmental, or other.

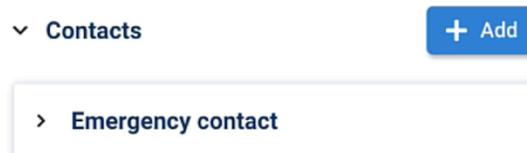


The **colour** of the icon is associated with the **severity of the allergy**. Black indicates **anaphylactic**, red indicates **severe**, orange indicates **moderate**, and blue indicates **mild**.

Along the left, users will see the profile information for this client. This section is pulled from the client's **demographic information** and contains details on the client's **address**, preferred **language**, **phone**, **gender** and **date of birth**. At the bottom of the page a small **map** is shown indicating the location of the client's **address**.

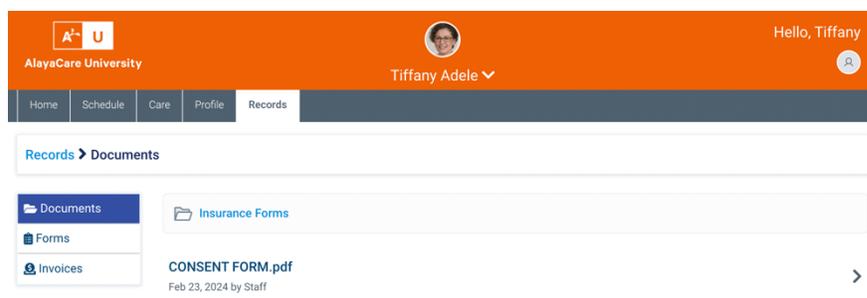
The client's **contacts**, as well as any **emergency contacts** are listed on this page as well.

A new contact can be added by clicking on the "add" button from the contact section.



Navigating the Family Portal Records Tab

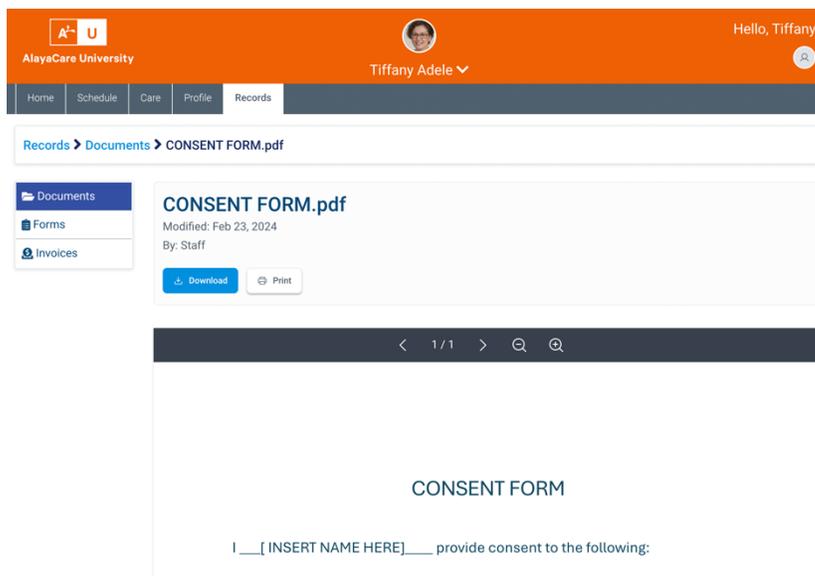
On the Family Portal **Records** tab users can view information pertaining to **documents**, **forms** and **invoices**.



1 Within the **documents tab**, family portal users can view documents that have been saved in the **client's attachments** within the **Family Portal folder** (or folders within it) on the AlayaCare Cloud.

Users can click the file to **review** the document, **download** and **print** it.

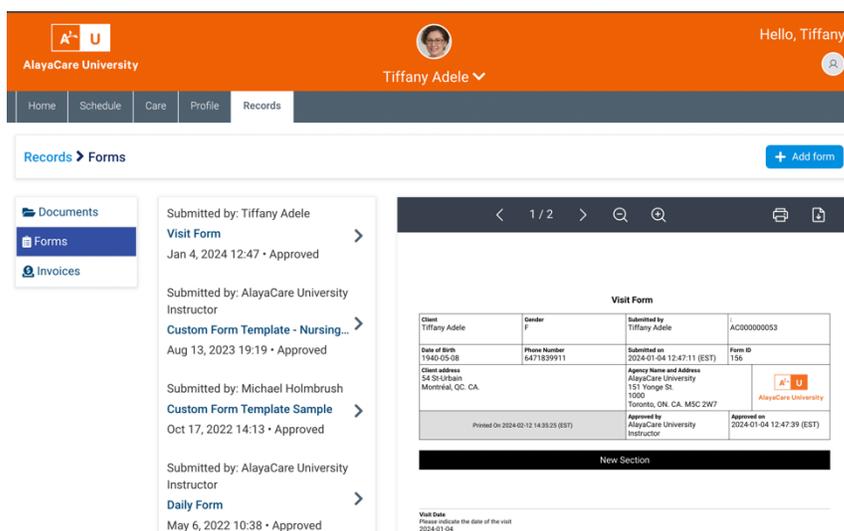
The **date** the file was uploaded, as well as the **name** of the individual that uploaded it will be visible.



2 In the **forms tab**, users can **view** completed forms as well as **complete** forms themselves.

Any type of form submitted by the user or completed by an agency employee for the client, that have a **status of approved**, will be listed.

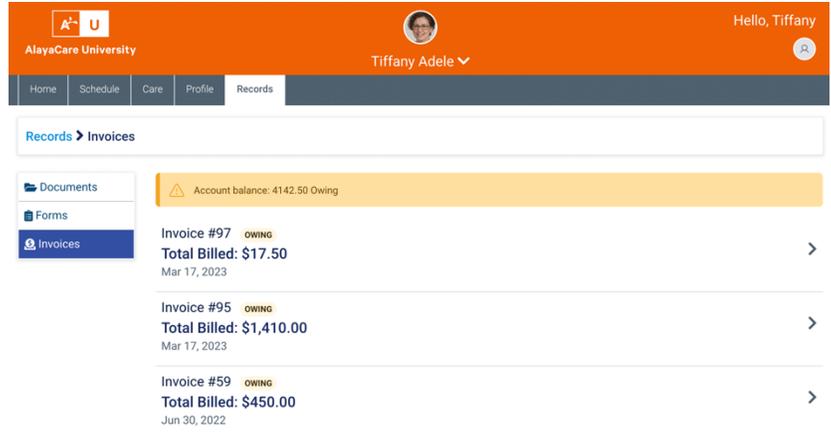
Users can **view the details** of the form by clicking on it.



The **name** of the individual that submitted the form along with the **date** and **time** of submission, and **status** will be indicated.

Users can select the **"add form"** button to be brought to the **list of forms** they can **complete**. Only forms that have been configured as **family portal type forms** will appear in the list to be able to complete.

3 Within the invoices tab, users can view the total account balance. Listed here will be current and past invoices that are in sent status. The amount billed for each invoice is visible and the invoice number is also indicated.



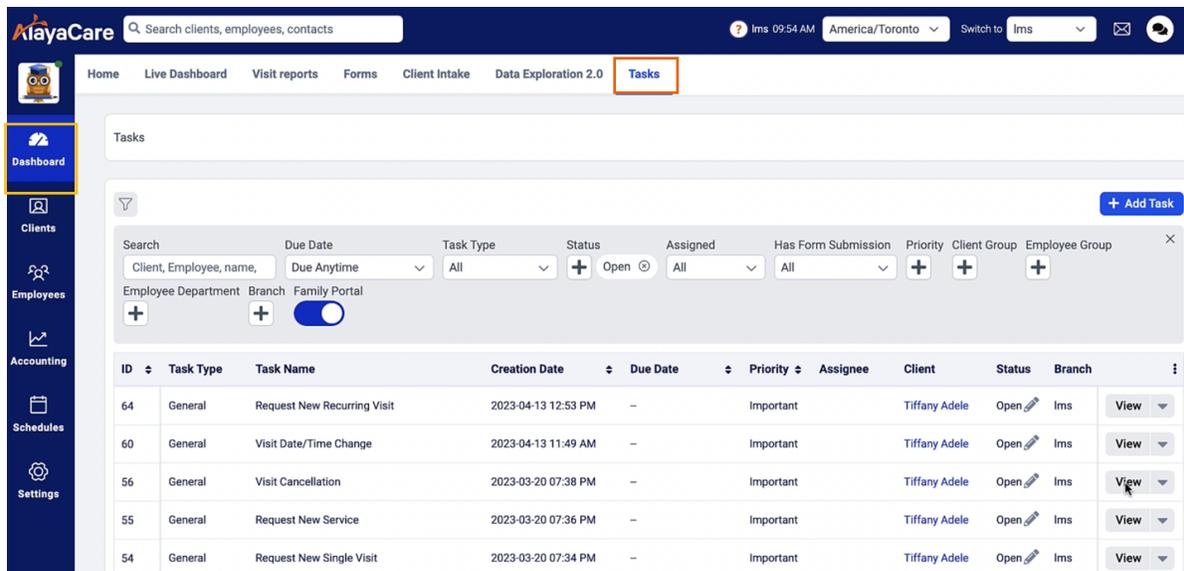
Users can click onto an invoice to view the full statement.

The invoice can be saved as well as printed to be added to user's personal records.

Family Portal Management for Back Office Staff

Any time a family portal user submits a new visit or service request or requests a visit change these submissions are sent to the AlayaCare Cloud. These requests are monitored by back-office staff and can be found on the dashboard under the tasks tab.

Under the filter options, toggle on the family portal button. Now only tasks associated with the family portal will be listed, allowing for a cleaner view of requests that have come through.



In the **task name** column, the **type of request** will be identified. This can either be a **visit cancellation or change**, a **request for a new service**, or a **request for a new single or recurring visit**.

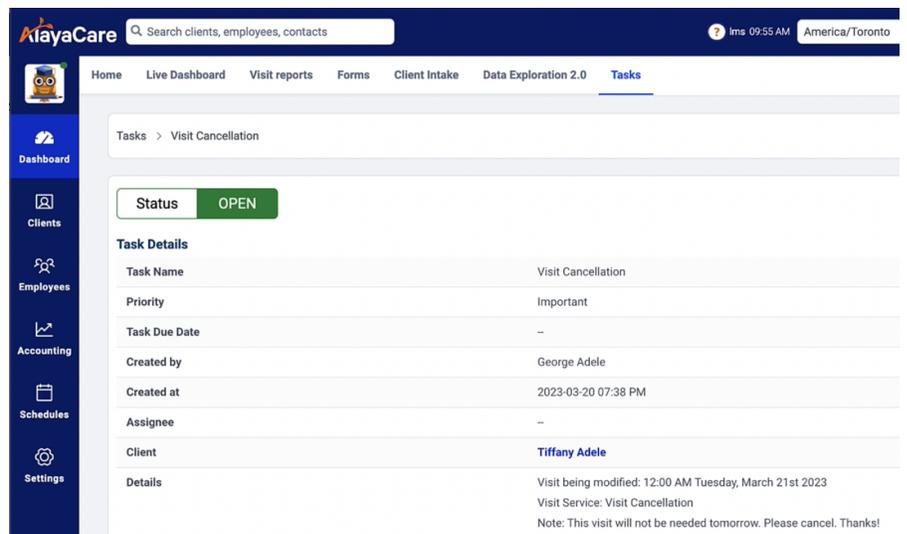
The **creation date** indicates the date the request was made by the family portal user.

The **client** the request pertains to will also be indicated.

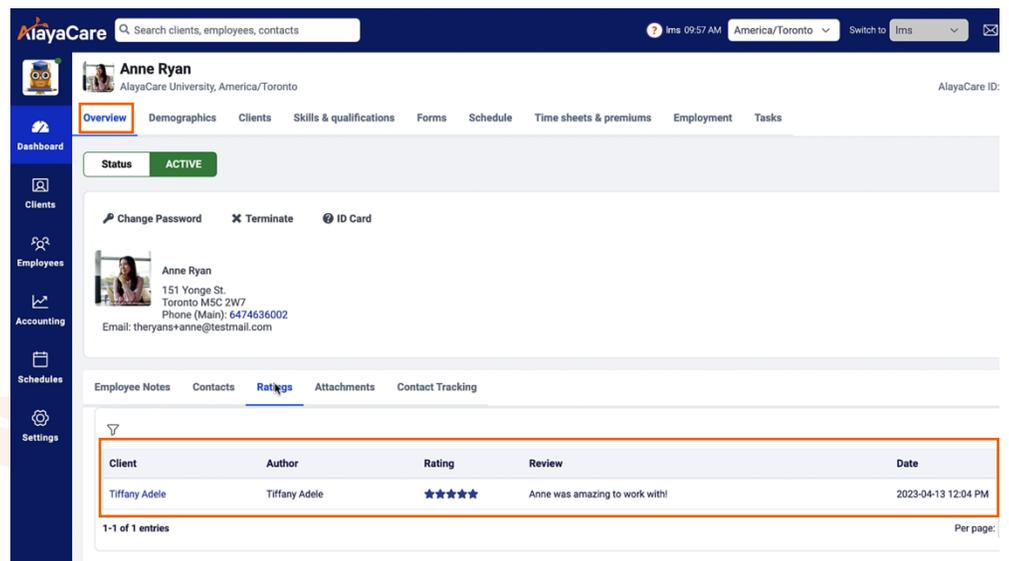
To view more information about the request, click on **view**. Here you will see **task details** such as which **family portal user** created this request. Remember, it **won't necessarily be the client** making these requests, it could be a family member who has family portal access. You will also be able to see the **specific details**.

The **details** will indicate **what the particular request is** and **what needs to be done**.

Once you have reviewed the information you can proceed with your agency's pre-arranged workflow for **completing tasks**.



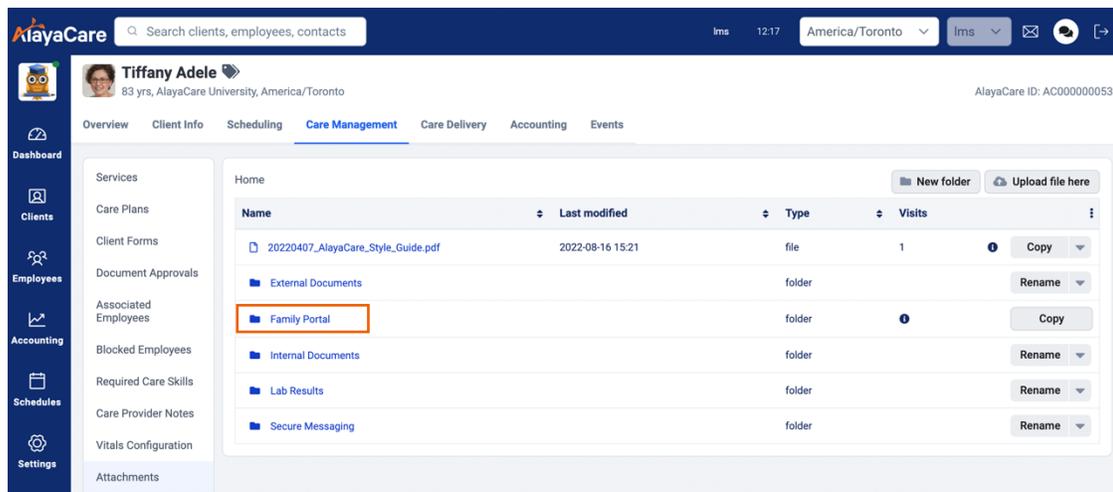
Additionally, on the AlayaCare Cloud, back-office staff can **view the reviews** that family portal users have given to **caregivers**. The reviews are shared with the agency but not with the caregiver.



Navigate to the **overview tab** on the **employee's profile**. Select the **ratings tab** to see reviews for that employee. The client the review pertains to, the author of the review, the rating, the review itself, as well as the date will be visible.

On the **Family Portal Records tab** users can view information pertaining to **documents**. The documents that are accessible on the family portal for users are ones that have been saved within the **client's attachment** folder in the AlayaCare Cloud.

From the AlayaCare cloud, navigate to the **client's profile**. From the **care management tab**, select **attachments**. Only documents that are added to the **Family Portal folder** will be visible to users of the family portal. **Additional folders can be created within this one**. They will also **appear on the Family Portal**, allowing you to organize the view for users as you wish.



Family Portal Adoption Reporting

To help monitor user adoption of the family portal, your agency can create a simple DE report to see stats on **who has logged in**, when the **last time they logged in** was and what their **assigned family portal role** is.

To do so, create a **DE report** using the **client explore** and add in the **following fields**:

- Client Full name
- Client Portal User full name
- Client Portal user last login
- Client Portal User Role Description
- Client portal user access

| | Client Full Name ↑ | Client Portal User Full Name | Client Portal User Last Login | Client Portal User Role Description | Client Portal User Access |
|---|--------------------|------------------------------|-------------------------------|-------------------------------------|---------------------------|
| 1 | Aaron Anthony | Adrienne Baker | 2021-02-24T14:10:42+00:00 | Patient | Granted |
| 2 | Adam Apple | Jeff Skinner | 2021-02-26T14:12:47+00:00 | Family | Granted |