



AXISCARE MOBILE

AN APP FOR CAREGIVERS

TUTORIAL

FOR ADMINISTRATORS

HIGHLIGHTS

We are excited to announce the release of AxisCare Mobile – the easiest way for caregivers to manage visits.

- **Clock in and out (restricted by GPS geofence)**
- **Document activities performed (ADL's)**
- **Record care notes, mileage, expenses**
- **Track inter-visit travel time and break times**
- **View upcoming and historical visits**
- **Navigate to client's home in your device's Maps app**
- **Respond to open visit requests from your agency**

Take a look at the following slides to learn more about the App and how it will benefit both you and your caregivers!



INTRODUCTION

Welcome to the AxisCare Mobile Tutorial!

In this presentation you will learn how caregivers will use the app, how to manage their usage of the app, and how to set up and change your app preferences.

Please contact our client support team with any questions you may have!

* Screenshots provided on these slides were taken from our test app which may be set up with different settings than you may set on your site.

TABLE OF CONTENTS

A. Navigating the App

- Downloading the App
- Logging In
- Home Screen
- Visit Details (ADLs, breaks, notes, expenses, mileage/ travel time)
- Schedule Tab
- Menu

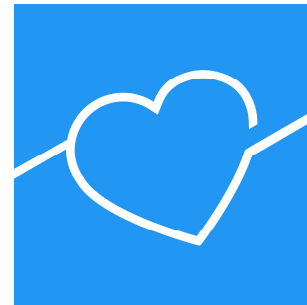
B. Agency Settings & Monitoring

- Enabling the App
- Call and Alert Windows
- Open Visit Permissions
- GeoFencing
- Map

DOWNLOADING THE APP

Downloading the App

- Open the App Store (iPhone) or Play Store (Android).
- Search for 'AxisCare'. The logo looks like the image to the right.
- Download the app (no charge).



NAVIGATING THE APP

Logging In: For Caregivers

(Administrators do not have logins for the app)

1. Caregivers will first need to activate their accounts (if they haven't already) in order to log in. Here are step-by-step instructions on how they activate their accounts:

- First go to your site's log in screen using their browser (__.axiscare.com).
- Click on the 'Active Account' link just below the Sign In button.
- Enter the email address associated with your AxisCare profile. (Contact your agency if you are unsure of this information).

- You will be sent an email to the email address entered. Either follow the link in the email or enter the activation code into AxisCare (you may also be asked for your date of birth and zip code).
- Set your password.

WELCOME TO AXISCARE

Email / Username

Password

Sign In

[Activate Account](#) | [Forgot Password](#)

NAVIGATING THE APP

2. Logging into the App

- Once they have activated their account they will need to open AxisCare Mobile and enter the following information:
- **Server:** Here they will enter your agency's 3 or 4-digit site number.
- **Username:** Typically caregiver's email.
- **Password:** They will enter the password they created when activating their account.



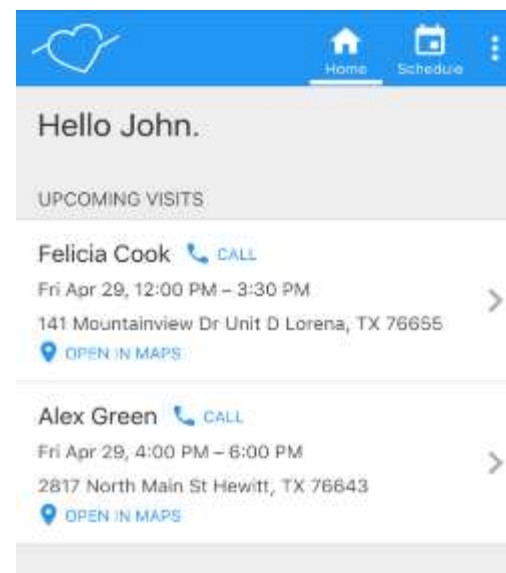
NAVIGATING THE APP

Home Screen

- The Home Screen shows today's current, upcoming, and completed visits.
- Each visit shown includes the following details:
 - Date and Time of Visit
 - Clock In/Out Time
 - Client's address and 'Open In Maps' link to open address in the device's maps app.
 - A 'Start Travel Time for This Visit' option may also be shown. They can start this timer when they leave for their next visit to

calculate inter-visit travel time.

- A 'Call' option may also be shown beside the client's name which they may use to reach out to the client.

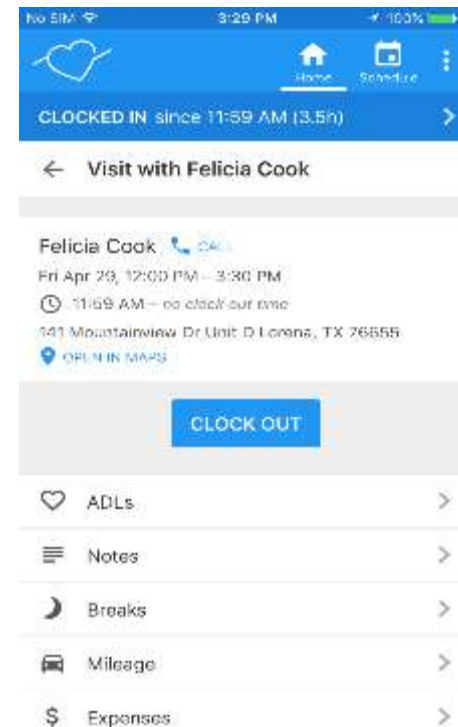


NAVIGATING THE APP

Visit Details

Caregivers will click on visits to:

- Clock In and Out
- Complete ADLs
- Complete Visit Notes
- Enter Breaks
- Enter Mileage
- Enter Expenses
- Enter Travel Time



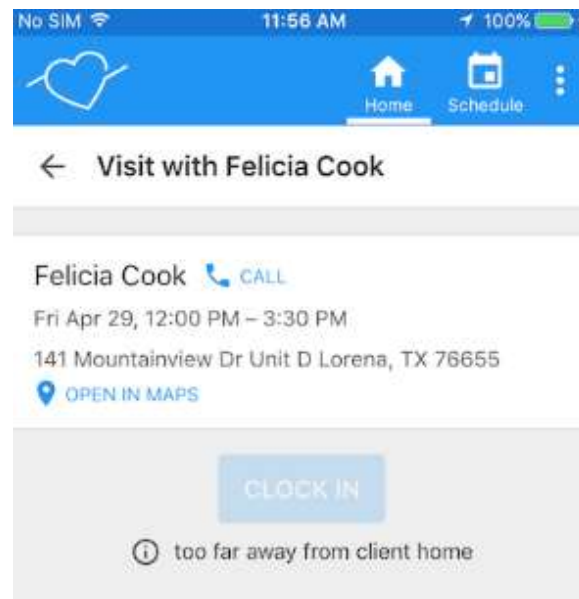
NAVIGATING THE APP

Clocking In/Out

Caregivers will click on the clock in/out button when they are ready to clock in/out for their shift.

- You may set call windows that will restrict caregivers to clocking in/out within a certain time frame of their visit time (i.e. 15 minutes before and after visit time). They will not be able to clock in/out of their shift if they are outside of that window.
- You may also set up a geo-fence that will only allow caregivers to clock in/out when they are less than a specified distance from the client's home. If they are outside the geo-fence they will not be able to clock in/out.

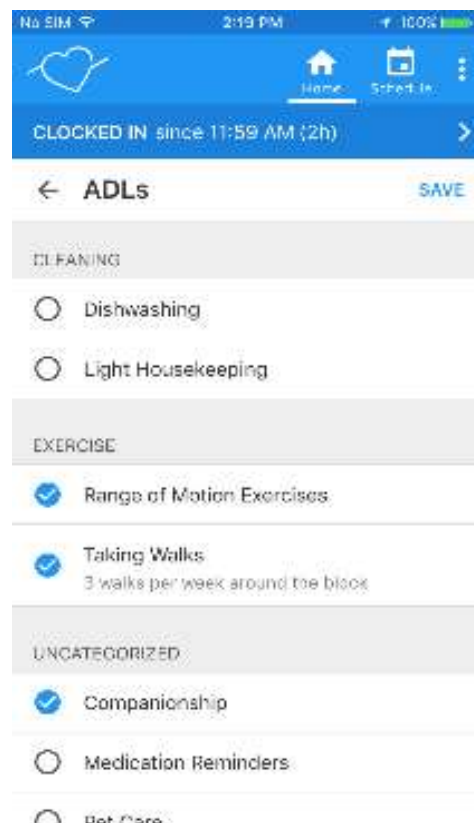
- Clock in/out button can only be clicked once. Time cannot be changed on the app once recorded.



NAVIGATING THE APP

Activities of Daily Living

- Caregivers will check all activities that have been completed for their shift and then press save.



NAVIGATING THE APP

Notes

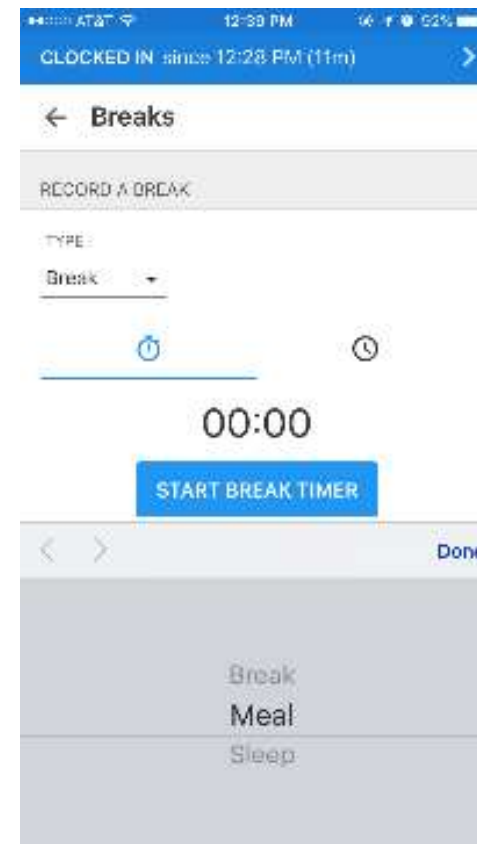
- Caregivers will enter visit notes and then save.
- Many devices support voice-to-text, which will allow caregivers to speak their notes into the app.



NAVIGATING THE APP

Breaks

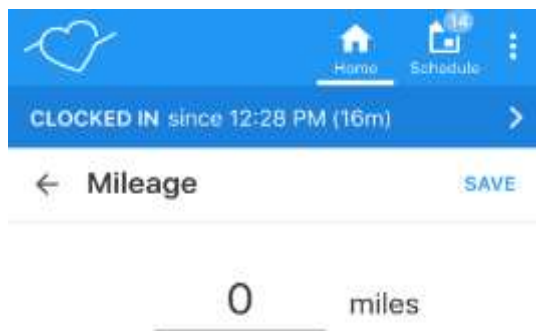
- Caregivers can time their breaks using the break timer feature OR manually enter their break time.
- Break, Meal, and Sleep categories can be chosen.



NAVIGATING THE APP

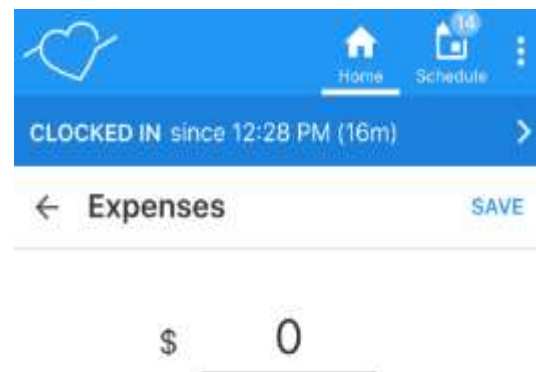
Mileage

Caregivers can enter the number of miles travelled during the visit.



Expenses

Caregivers can enter the total expenses for the visit.

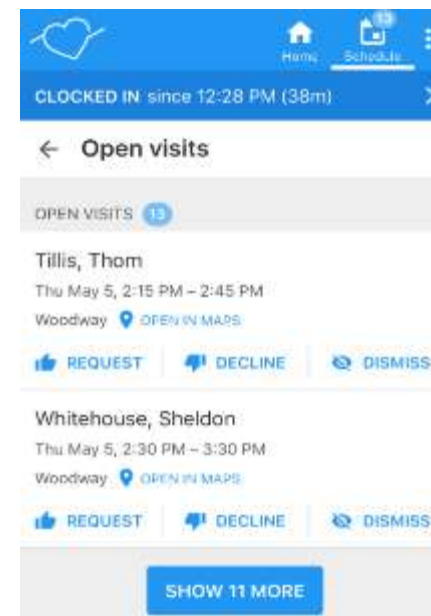
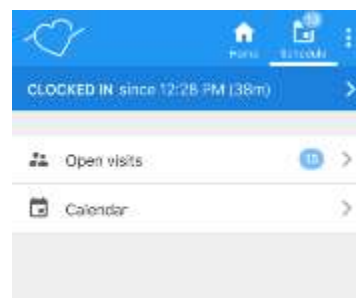


NAVIGATING THE APP

Schedule Tab

Open Visits: Caregivers can see all open shifts available for them to accept or decline.

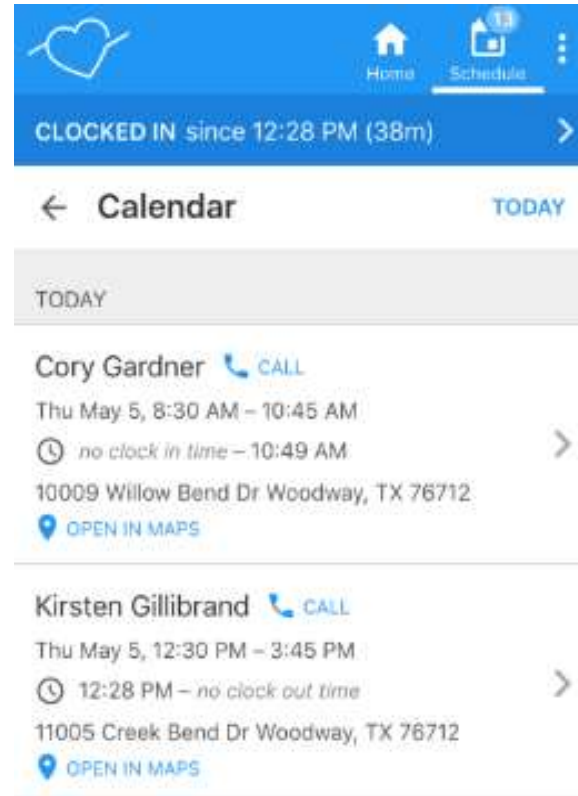
- Accept, decline, or dismiss each open visit.
- When a caregiver requests a visit the agency can finalize the assignment within AxisCare OR configure the system to automatically assign requested visits.
- Clicking on 'See More' will allow them to view more available visits.



NAVIGATING THE APP

Calendar

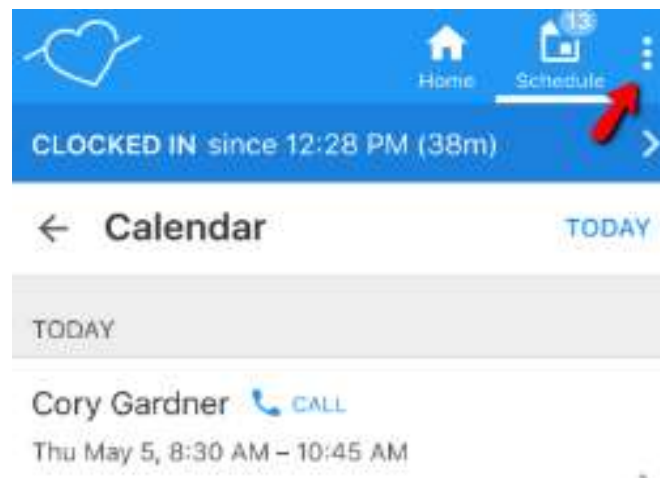
- The calendar will show caregivers the visits they are assigned to for the next week.



NAVIGATING THE APP

Menu (Three dots at top right of your screen)

- Refresh: Refreshes the screen to show the most recent changes.
- Sign Out: Logs them out of their account.
- About: Displays AxisCare Mobile version and geo-location.

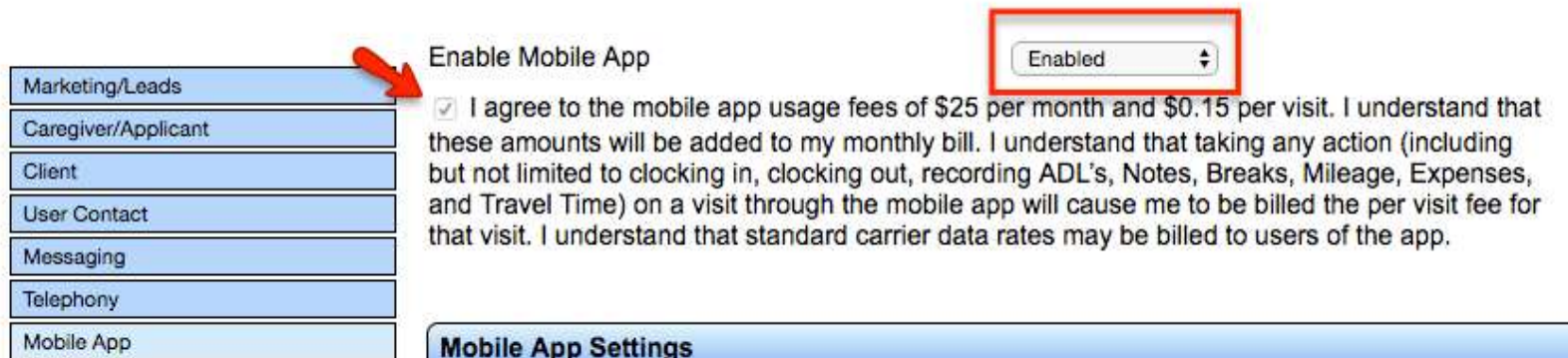


APP SETTINGS

Enabling the App

- Enable the app under **System Administrator -> System Preferences -> Mobile App** by reading and agreeing to the terms and conditions then choosing 'Enabled' in the dropdown.
- Agreeing to the terms and conditions will cause you to be billed for usage of AxisCare Mobile.

SYSTEM PREFERENCES



The screenshot displays the 'SYSTEM PREFERENCES' section of a software interface. On the left, a vertical list of menu items includes 'Marketing/Leads', 'Caregiver/Applicant', 'Client', 'User Contact', 'Messaging', 'Telephony', and 'Mobile App'. A red arrow points to the 'Mobile App' item. To the right, the 'Enable Mobile App' section is visible, featuring a dropdown menu currently set to 'Enabled', which is highlighted with a red rectangular box. Below the dropdown is a checked checkbox followed by a paragraph of terms and conditions regarding mobile app usage fees. At the bottom of the interface, a blue bar contains the text 'Mobile App Settings'.

Marketing/Leads
Caregiver/Applicant
Client
User Contact
Messaging
Telephony
Mobile App

Enable Mobile App

Enabled

I agree to the mobile app usage fees of \$25 per month and \$0.15 per visit. I understand that these amounts will be added to my monthly bill. I understand that taking any action (including but not limited to clocking in, clocking out, recording ADL's, Notes, Breaks, Mileage, Expenses, and Travel Time) on a visit through the mobile app will cause me to be billed the per visit fee for that visit. I understand that standard carrier data rates may be billed to users of the app.

Mobile App Settings

APP SETTINGS

Mobile App Settings

- Enable/Disable caregivers to clock in/out using the app.
- Geo-fencing Radius: Choose the maximum distance in meters the caregiver may be from the client's home in order to clock in/out. Set to '0' to disable geo-fencing.
- Caregiver Permissions: If disabled these options (expenses, mileage, travel time, breaks) will be removed from their app.
- Requirements before clock out: Choose whether you would like the app to force the caregivers to enter ADLs and notes (if ADLs are not completed) before they are able to clock out (clock

in/out button will be grayed out).

The screenshot displays the 'Mobile App Settings' interface. It features a title bar at the top, followed by several settings sections. The 'Allow Clock In/Out' setting is a dropdown menu set to 'Enabled'. The 'Default Geofence Radius (meters)' is a slider control set to 100. The 'Caregivers Permissions' section includes dropdown menus for 'Expenses', 'Mileage', 'Travel Time', and 'Breaks', all set to 'Enabled'. The 'Time (minutes) allowed to make changes after visit' is a text input field with the value 180. The 'See client phone numbers' setting is a dropdown menu set to 'Enabled'. The 'Requirements before Clock Out' section includes dropdown menus for 'ADLs must be submitted' and 'Notes when any ADL was not completed', both set to 'Enabled'.

Setting	Value
Allow Clock In/Out	Enabled
Default Geofence Radius (meters)	100
Expenses	Enabled
Mileage	Enabled
Travel Time	Enabled
Breaks	Enabled
Time (minutes) allowed to make changes after visit	180
See client phone numbers	Enabled
ADLs must be submitted	Enabled
Notes when any ADL was not completed	Enabled

APP SETTINGS

Calls and Alerts

1. Alert Windows: If a caregiver tries to clock in/out more than this many minutes early/late you will be alerted.
2. Clock In/Out Windows: Up to how many minutes early/late the app will allow caregivers to clock in/out. It will not allow them to clock in/out if they are outside of these windows.

*These windows apply to both AxisCare Mobile and Telephony.

Calls and Alerts (Mobile App and Telephony)

Alert Windows

Clock-In early (minutes)

Clock-In late (minutes)

Clock-Out early (minutes)

Clock-Out late (minutes)

Clock-In/Out Windows

Clock-In before (minutes)

Clock-In after (minutes)

Clock-Out before (minutes)

Clock-Out after (minutes)

APP SETTINGS

Open Visit Permissions

- Choose which open visits the caregivers should see on the app: Disabled, All Available Open Visits, or Only Open Visits Sent Via Messaging.
- Choose whether you would like caregivers to automatically be assigned to shifts they accept via the app (Enabled) or if you would like to be sent a message that allows you to finalize their acceptance (Disabled).
- Choose how many days out they can see open visits.
- Choose if you would like the app to show the city the visit is in.
- Choose if you would like the client's name to be displayed on open visits, and if so, what format you would like their name to be show in.

Open Visit Permissions (Mobile App and Bulletin Board)

Allowed to view Open Visits on Mobile App and Bulletin Board

Allowed to directly accept visit (if Disabled, they can only generate Alerts to request assignment):

How many days forward should they be able to see:

Show the City the visit is in:

Show the Name of the client:
This may affect HIPAA compliance

All Available Open Visits

Enabled

2

Enabled


Enabled default (Last, First)


MONITORING APP ACTIVITY

Geo-Fencing

- In addition to the site-wide geo-fencing setting, you are also able to set (or disable) client specific geo-fences on client profiles (found under the residential address).
- If disabled, caregivers will be able to clock in/out at any distance from the home.
- If set, the amount of meters chosen will override the system-wide setting for this client.

Mobile App Geofence

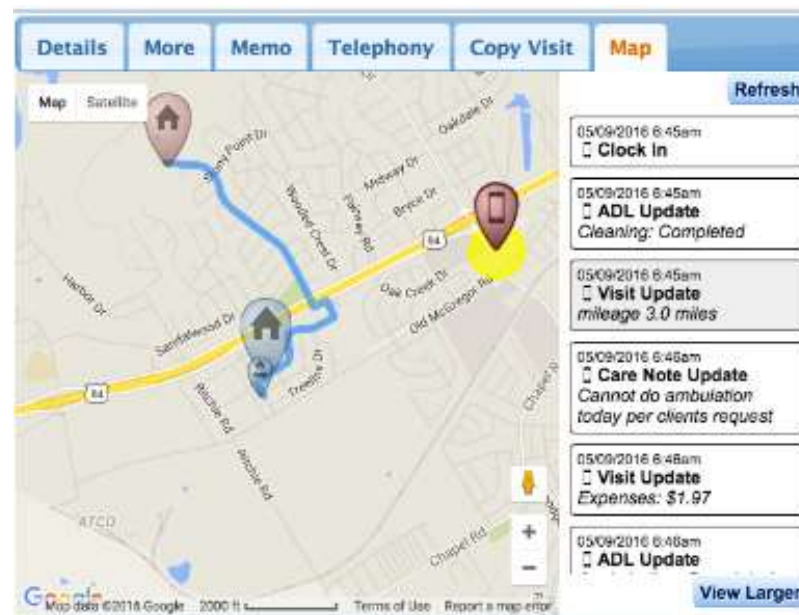
Enabled 

Override geofence radius: meters 

MONITORING APP ACTIVITY

Maps

- The 'Map' tab found on each visit shows pins for the client and caregiver homes as well as locations where caregivers clocked in/out and entered information such as ADLs and Care Notes.
- Click on the activity to see where the information was recorded (yellow circle).



**Please contact our support team with
any additional questions you may
have.**

Phone: 800-528-6201
E-mail: support@axiscare.com