Caregiver Portal Playbook

Contents

THE CAREGIVER PORTAL

Overview

The Procura Caregiver Portal is a secure Internet web browser that you can access anywhere, anytime to get real-time information via your **mobile devices** or **desktop computers**. It is especially important for you, our amazing caregivers, to stay connected as you are always out in the field providing excellent service to our valuable clients.

The Caregiver Portal system comes with a few key features that allow you to view your schedule in real time, accept and decline offers, viewing client's information & directions to their homes, as well as viewing your availability. You can enjoy all of these features via the secure, web-based Caregiver Portal system at your own convenience without having to contact Care Services Center first.

As you go through this Playbook, please be sure to follow along on the video guide created especially for you in the appendix.

How will the Portal make your lives better?

**No need to call in to the Care Services Center to:**

- ♥ Accept or decline visits
- ♥ Request your schedule
- ♥ Access specific client information and directions
- ♥ View your availability

LOG-IN

Website

To access Caregiver Portal, navigate to: https://eportal.nursenextdoor.com/

View via desktop
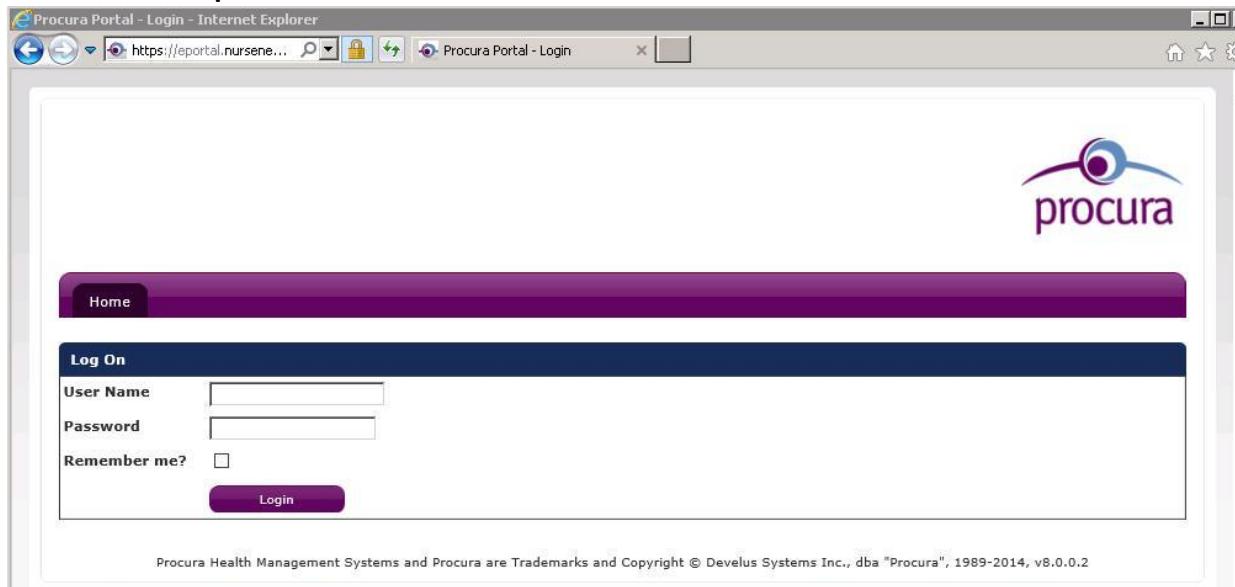
View via mobile device
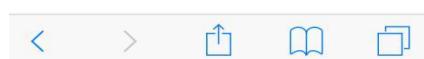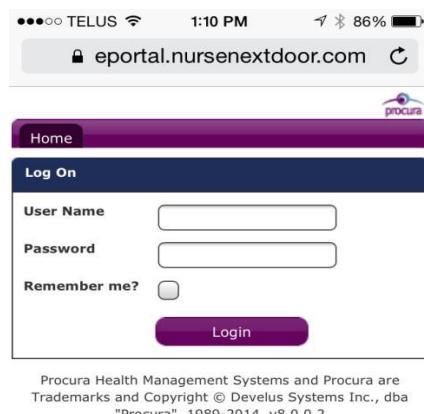
Username

Type your user name in to the 'Username' textbox. Your user name is the email address that you provided to your Care Designer upon hiring, unless advised otherwise*.

If you are employed by multiple Nurse Next Door franchises, you will have a different login details for each of the accounts. Please follow up with your Care Designer about this.

Password

Your password is your unique CallMe! PIN. Type in your password in the 'Password' textbox. Your CallMe! PIN should have been provided to you upon hiring. If you do not have one yet, please contact your Care Designer.

After entering your **User Name** & **Password**, click on '**Login'**

Please note that the Portal will **lock you out** if you have **3 consecutive unsuccessful login attempts**. If this happens, please contact your Care Designer to unlock your account.

Confidentiality

It is your responsibility to keep your log-in details secure at all times as **the Portal gives access to private client information.** Please do **NOT** share your password with anyone.

If you are employed by multiple Nurse Next Door franchises, you will be provided with different log in details from each specific franchise. Please follow their instructions.

FEATURES

Once you log into the Caregiver Portal, you will see 4 tabs like the following:

Home

This section may include any important messages from your franchise, e.g. link to newsletters.

Schedule

This section will allow you to view your schedule in real-time and access specific client information, including directions.

Offers

This is where you view **NON-URGENT** offers (clients) made to you by Care Services. Here you can view all visits offered to you, as well as accept or decline these visits. You can also view specific client information (i.e. client's address) to help you decide whether or not you can accept the visit.

Availability

In this section, you can view your availability provided to Nurse Next Door. Care Services will make offers to you within your availability.

SCHEDULES

Viewing your schedule

To view your schedule, follow the steps
    below: 1. Click on the 'Schedules' tab

2. Select the date range of your schedule that you want to view by entering the start and end dates into the 'date fields', then click 'Search'.

   ♥ You are able to view your schedule up to **the next 30 days and 2 pay periods prior to the current date,** depending on your franchise payroll cut-off periods

   ♥ Any visits outside of this selected period will **NOT** be posted

   ♥ All of your confirmed visits during the selected period of time, including cancelled visits, will be listed by date

   ♥ **Verified** visits are visits that are processed by Payroll and will appear in italics. Care Services cannot adjust these visits anymore.

To View Visit Information

You can access the visit information via your schedule, including the following:

1. The Client's Name

If you click on the client's name, you will be able to access more information about the visit and the client. See below for an example:

Visit Information	
Date	9/23/2016
Times	3:00 PM -> 6:00 PM
Minutes	180
Pattern	Onetime Visit
Type	CG1
CVID	0675
Activities	
Status	Active

Client Information	
Name	Walt Disney
Address	123- Banana Ave, Toronto, ON, M5B 2H1
Directions	Buzz #: 12345
Birth Date	9/22/1964 (52)
Gender	Male
Marital Status	Married
Area	3 TOB
Residence Type	House
Referral Source	Auto Insurance
Referral Date	9/22/2016

Client Service Requirements			
Description	Attach Date	Reference Number	Detailed Description
Can Transport/Transport Required	9/22/2016		
Dementia	9/22/2016		

Client Languages
Language Name
Dutch
English
French

2. *The Client's Address*

> You can click on the address and it will take you **directly to Google Maps.** If you are accessing the portal on your phone, **and you have Google Maps installed on your phone**, it will show you the address in the app.
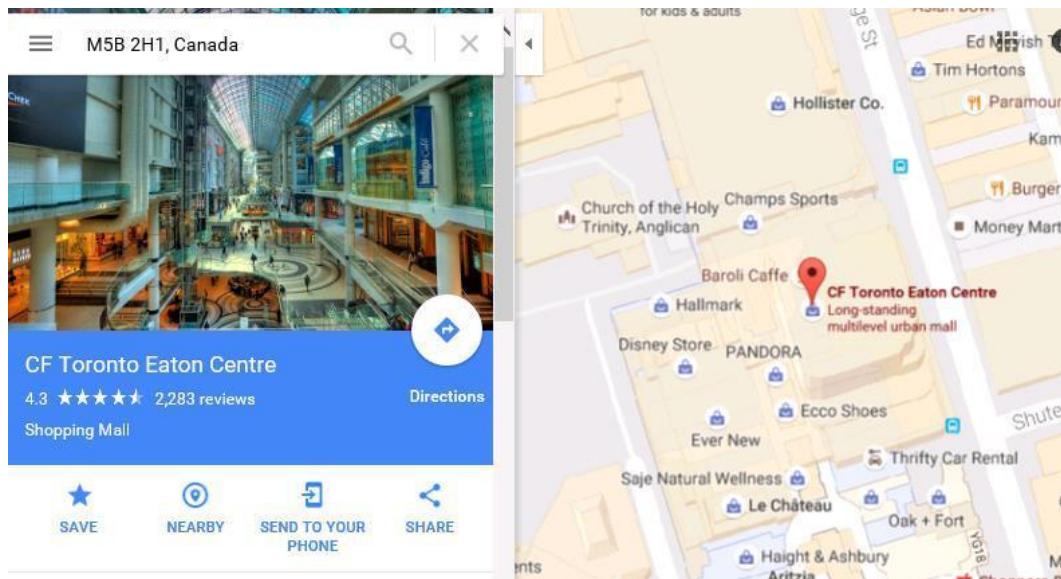
3. *The Type of Visit (CG1, CG2, RN, etc.)*

4. *The Exact Time of the Visit*

5. *The length of the Visit*

6. *CVID* - **NOTE** *disregard this column as it is NOT relevant*

Once you are done viewing a particular visit's information, you can return to your full schedule by clicking the 'Back' icon.

OFFERS

The 'Offers' tab displays all visit offers made to you. You can review the details and indicate if you are interested or disinterest in the offer via the Portal.

We recommend that you check the Portal at least **once a day** to ensure that you are up-to-date with visits that have been offered to you.

How will you be notified when offers are made to you?

- ♥ You will be notified via email at your personal email address when an offer is made to you

Understanding the offer

Explanation of different columns under 'Offers' tab

Column name	Explanation
Due	Every offer comes with an expiry time. Please respond to the offer before it expires.
Status	Offers will be under two statuses:
	♥ **OPEN**: Indicates that you can still respond to this offer ♥ **PENDING**: Indicates that you have expressed your interest in this offer and you are waiting for the offer to be awarded to you
Address	This is the client's address. By clicking on the address, Google Maps will come up to show you directions.
Gender	This is the client's gender
Visit Date	This is the visit date
Times	This is the time of the visit
Minutes	This is the length of the visit
Pattern	This is the frequency of the visit, could be one-time or recurring

Type	This is the billing service type of the visit
Interested	This is where you indicate if you are interested in the offer or not. Click on 'Interested' or 'Not interested', each of which is linked to a separate page. Expressing interest in an offer does not mean that you are immediately awarded the visit. Only awarded visits will display on your online schedule.

Expressing Interest to offer

You can express your interest or disinterest to offers by:

1. Click the 'Interested' or 'Not interested' option in the 'Interested' column:

2. Once you click on 'Interested', the following screen will follow:

♥ If the offer is of a one-time basis, you will have the option to accept 'The entire offer'

♥ If the offer is recurring, you will have two options: 'The Entire Offer' or 'This specific visit within the offer'

   o 'The entire Offer' indicates you are interested in EVERY visit within this offer
   o 'This specific visit within the offer' indicates you are interested in the specific date displayed within the offer.

♥ Click on 'Interested' once you have selected your desired option

- ♥ On your 'Offers' home screen, the visit will still appear but its status will be changed to *Pending,* instead of 'Open'. 'Pending' means that it needs to be approved or "awarded" to you by Care Services.
- ♥ Care Service will not award you the visit until the offer has expired.
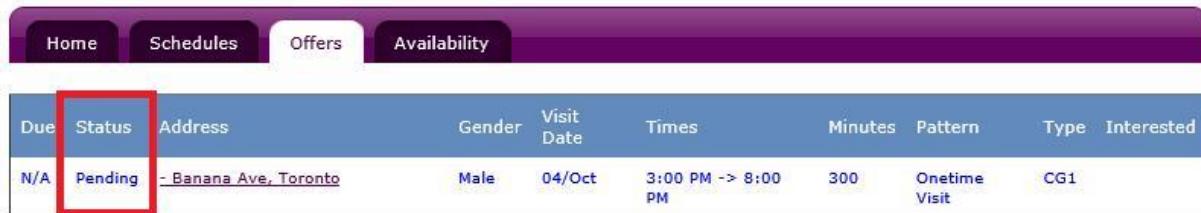
	Home	Schedules	Offers	Availability								
Due	Status	Address			Gender	Visit Date	Times		Minutes	Pattern	Type	Interested
N/A	Pending	- Banana Ave, Toronto			Male	04/Oct	3:00 PM -> 8:00 PM		300	Onetime Visit	CG1	

- ♥ When you are awarded the visit, **you will receive an email confirmation**
- ♥ If you have not visited this client before, Care Services will email you the client's care plan.

What if someone else is awarded the visit?

There are a lot of factors when deciding who gets awarded the visit when more than one caregiver expresses interest. We will try to find the best possible match between our clients and caregivers.

There is a chance that you might not be awarded the visit even if you expressed interest. If this is the case, you will not receive an email confirmation that you are awarded the visit. The visit also will not show up on your schedule.

Expressing disinterest to an offer

If after viewing the visit information, you decide that you are "Not Interested" in the visit, you can click 'Not Interested' on your 'Offers' home screen:

Once you click on 'Not Interested', the following screen will appear:

- ♥ If it is an one-time offer, you will only have 'the 'entire offer' option

♥ If the offer is recurring, indicate if you are 'Not interested' in the 'Entire offer' or just 'this specific visit within the offer'

♥ Click on 'Not Interested' once you have selected your desired option

♥ You will need to select a reason under the 'Reason' dropdown to indicate why you are not interested in the offer, then click 'Not interested'.

♥ Once completed, the offer will disappear from the 'Offer' page.

Find out more about how to respond to visits in the videos created especially for you in the appendix.

Summary of How to Process an Offer
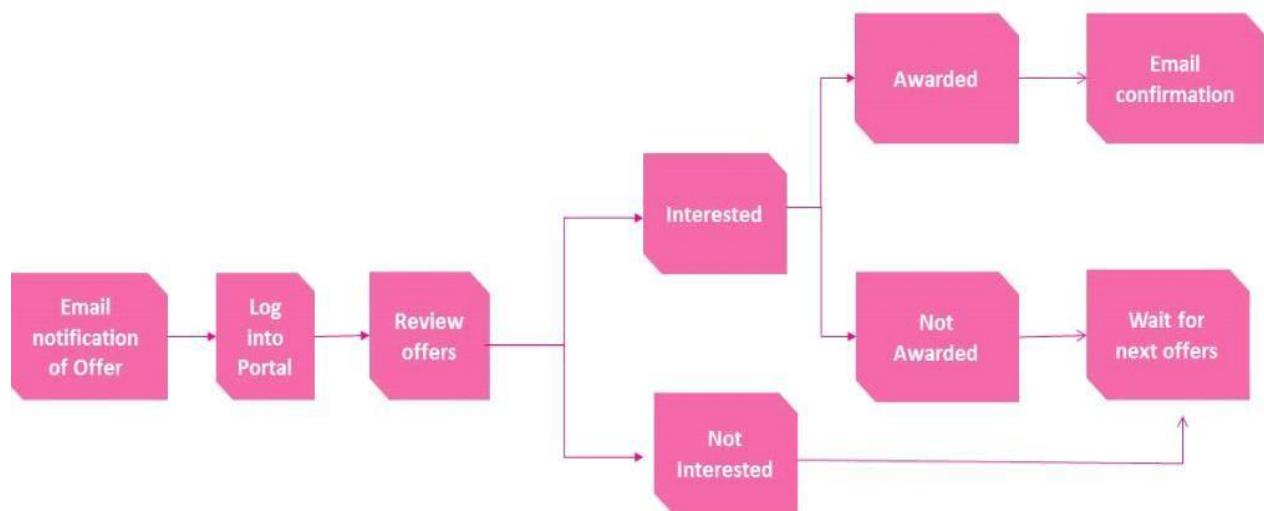
AVAILABILITY

Your Portal will also allow you to view your Nurse Next Door availability schedule in real time. Remember, this is the availability you submitted to your Care Designer and Care Services. It does not mean that you have to work all the hours within your availability, but Care Services will only offer you visits within your availability.

Viewing Current Availability

To view your current availability, click on the 'Availability' tab.

You can look at the next **month** (or previous month) by using the "previous" and "next" icons.

For example, based on this caregiver's availability in the image below, he or she is:
- ♥ Available every Fri, Sat & Sun 0800-2000
- ♥ Available every Tue, Wed, Thurs all day
- ♥ Not available every Mon and Oct 12

Department: Walt Disney ▼ Search   Previous Next

October 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30 8a – 8p	1 8a – 8p
2 8a – 8p	3 OFF	4 ON	5 ON	6 ON	7 8a – 8p	8 8a – 8p
9 8a – 8p	10 OFF	11 ON	12 OFF	13 ON	14 8a – 8p	15 8a – 8p
16 8a – 8p	17 OFF	18 ON	19 ON	20 ON	21 8a – 8p	22 8a – 8p
23 8a – 8p	24 OFF	25 ON	26 ON	27 ON	28 8a – 8p	29 8a – 8p
30 8a – 8p	31 OFF	1 ON	2 ON	3 ON	4 8a – 8p	5 8a – 8p

Updating Availability

If your availability is no longer accurate, please contact Care Services to update your new availability.

Please note, any **change of availability that <u>conflicts</u> with your existing scheduled visits** is considered a **time-off request** and must be **approved by your HR manager or Care Designer** before Care Services can adjust your availability.

Frequently Asked Questions

1. **Will Care Services still contact me via calls or texts to offer me visits, or are they only going to offer me clients via the Portal now?**

    Yes, Care Services will still make offers via calls & text for urgent visits. For any visits that are non-urgent Care Services will offer them to you via the Portal.

2. **Can I call, text or email Care Services to let them know I am interested or not interested in offers, when the offers are made via the Portal?**

    No, if the offers were made via the Portal, please **ALWAYS** reply through the Portal system as it is meant for non-urgent visits. This will allow Care Services to allot resources to get to urgent matters faster to assist those in an emergency. It will keep our statistics in reporting accurate when measuring how and in what areas we can continue to improve the Portal.

3. **What do I do if I forget my username or password?**

    Your username is always your personal email address that you provided to your HR manager when hired, and your password is the confidential CallMe! PIN, unless advised otherwise.

4. **What if I get locked out of my account?**

    If you put in the wrong PIN 3 times consecutively, you will be locked out of the account. Please contact your Care Designer or HR manager to unlock your account.

5. **Why is there an expiry time?**

    Since the Caregiver Portal is meant for NON-URGENT visit offers, we want to make sure that you all have enough time to review your own schedule before accepting any visits. We understand that you all have a busy personal schedule. By allowing an expiry time to respond to offers, you do not have to rush to respond to us right away when you receive the offers, e.g. if you are with a client when you receive the offer.

If you have any further questions, please feel free to contact you Care Designers or HR manager.

Nurse Next Door™
home care services

Appendix

Video links on Caregiver Portal

1. **Introduction to Caregiver Portal**
   https://vimeo.com/185551862

2. **How to Log in**
   https://vimeo.com/186032519

3. **View Schedule**
   https://vimeo.com/186033865

4. **View Offers**
   https://vimeo.com/186034587

5. **How to Respond to an Offer**
   https://vimeo.com/186035298

6. **After Responding to an Offer**
   https://vimeo.com/186042364

7. **View Availability**
   https://vimeo.com/186042718

Password for all videos: makeiteasy