



Adding Clients



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Client Profiles Explained

Client Profiles enable you and your team to capture critical client data and store it in one secure place. This team collaboration tool helps you provide a first-class care service.

Do you spend too much time dealing with paperwork? **Client Profiles** digitize your workflow and data captures, and encrypt and store these in your secure environment.

We want to help you cut down on the time it takes to manually complete tasks. **Client Profiles** automates these, allowing you to cut costs and be more time efficient.

We know that communication is vital in your Client and Caregiver relationships and in your Care Team, each of whom can access relevant information through a secure portal, including designated family members. Communication is made easy through Messaging and Care Updates providing real time alerts and insights.

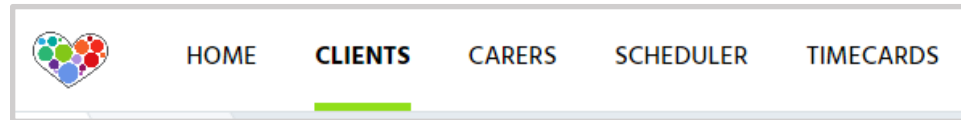
Client Profile Features

- ✓ Scheduling and Care Planning
- ✓ Meds and Meds Alerts
- ✓ Notes Repository
- ✓ Real Time Care Updates
- ✓ Contacts
- ✓ Family Portal

2 Adding a Client

Create a Client Profile

Add a New Client

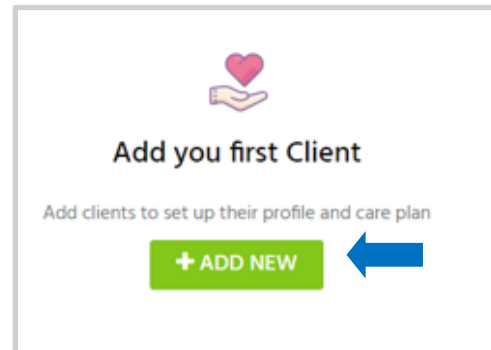


To add a new Client, select **Clients** from the header.

Then click on **+Add New Client**.



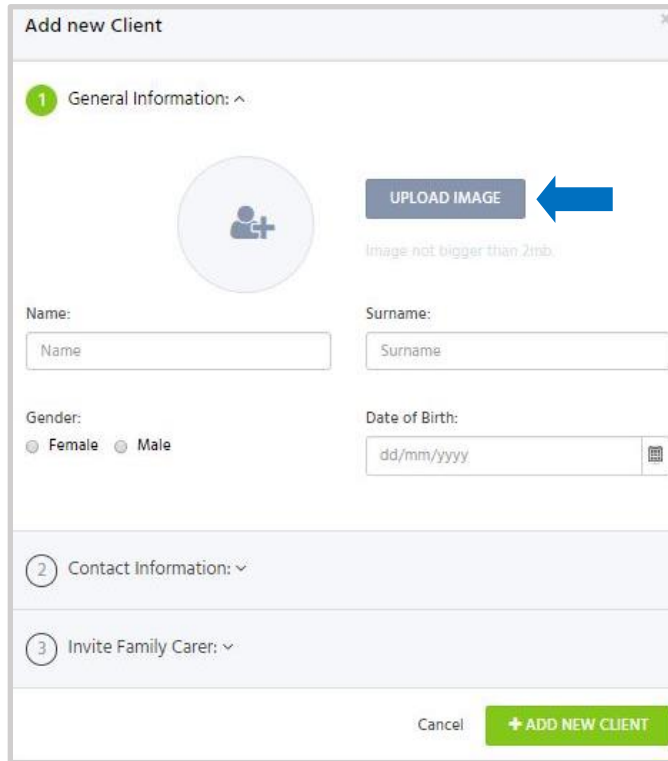
Or if it's your first client, you can also click **+Add New**.



2 Adding a Client

Create a Client Profile

General Information



The screenshot shows a web form titled "Add new Client" with a close button (X) in the top right corner. The form is divided into three sections: "1 General Information: ^", "2 Contact Information: v", and "3 Invite Family Carer: v". The "General Information" section contains a circular profile picture placeholder with a person icon and a plus sign. To its right is a blue "UPLOAD IMAGE" button with a blue arrow pointing to it. Below the button is the text "Image not bigger than 2mb.". The form also includes input fields for "Name" and "Surname", radio buttons for "Gender" (Female and Male), and a "Date of Birth" field with a calendar icon. At the bottom of the form are "Cancel" and "+ ADD NEW CLIENT" buttons.

We recommend **uploading a picture** of the client as it always helps you and your team recognize them on visits, or when accessing a profile for updates and info.

Tip: You can take and upload a picture on mobile using the Carefolk Pro mobile app at a later time if you prefer.

2 Adding a Client

Create a Client Profile



Contact Name & Email Address

Address

The address is the client's residential address.

Why is it important to input your client's address?

It enables several services:

- Dashboard Overview Map
- Optimized Carer Client Matching
- Location Finding
- Automated Travel Expenses
- Automated Visit Sign-Ins and Timecards

2 Contact Information: ^

Contact Full Name: Living alone

Email:

Address Line 1: Address Line 2:

Town: City:

Country: Zip Code:

Home Phone Number: Home Mobile Number:

2 Adding a Client

Create a Client Profile



Invite members of your Client's Family

You can **invite family members** and give them **limited access** through a family portal. This is a fantastic way to share updates, scheduled visits and manage the relationship with your client and their family.

3 Adding a Client

View and edit Client Profiles


3 Invite Family Carer: ^

Email:

Invitation email

Cancel



 **Trish Punch**

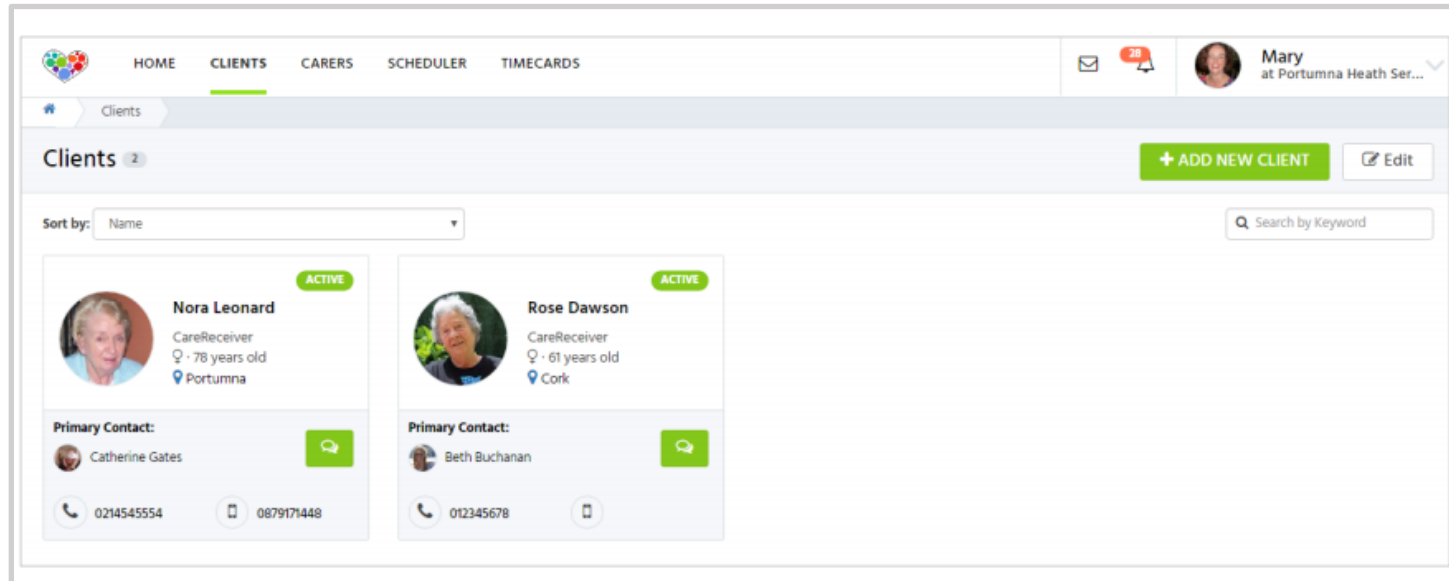
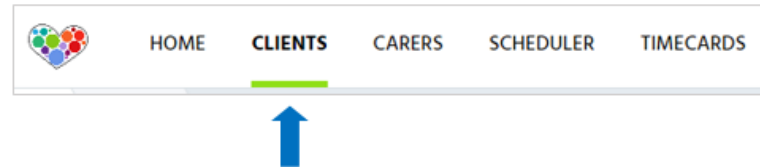
Family Carer
👤 - 40 years old
📍 Portumna

02143474091 0863209635



View and Edit Your Client Profiles

All of your clients will be visible under **Clients**. Click on **Clients** in the top navigation to view Client Profile cards.



To view your Client's profile, simply click on your **Client's profile card** to open it.

You can add to the Client's profile if you wish to. Each section has an **Edit** button. If you wish to edit a section, simply click **Edit**. When finished editing, click **Save**.