



Care  
FOLK  
PRO

# 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

## Client Profile

- ✓ 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



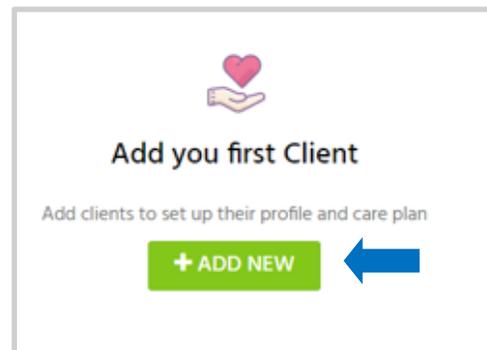
To add a new Client,  
select **Clients** from the



Then click on **+Add New**



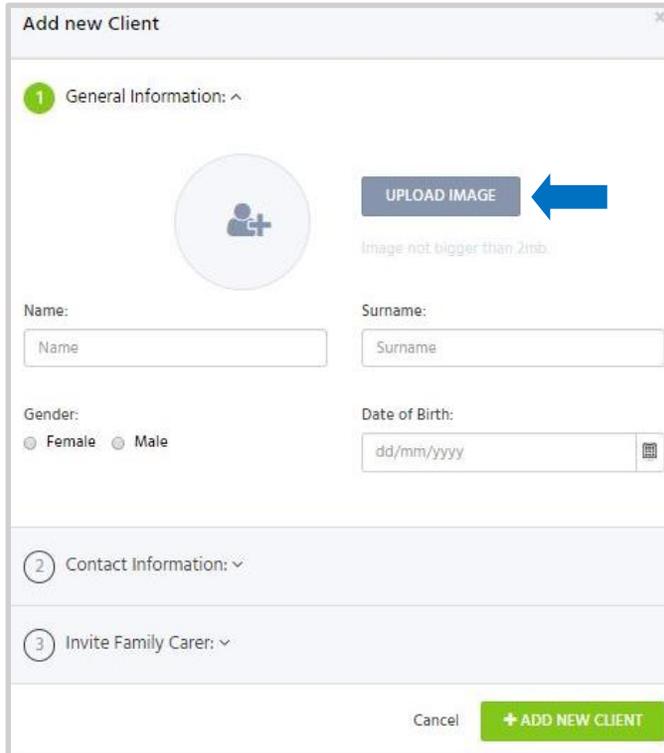
Or if it's your first client,  
you can  
also click **+Add New**.



## 2 Adding a Client

### Create a Client Profile

### General Information



**1** General Information: ^



**UPLOAD IMAGE** ←

Image not bigger than 2mb.

Name:

Surname:

Gender:  Female  Male

Date of Birth:

**2** Contact Information: v

**3** Invite Family Carer: v

Cancel **+ ADD NEW CLIENT**

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

The contact name and email address will be that of the **Primary Family Contact** for the client. It can be either the clients themselves or the Family member who will act as point of contact.

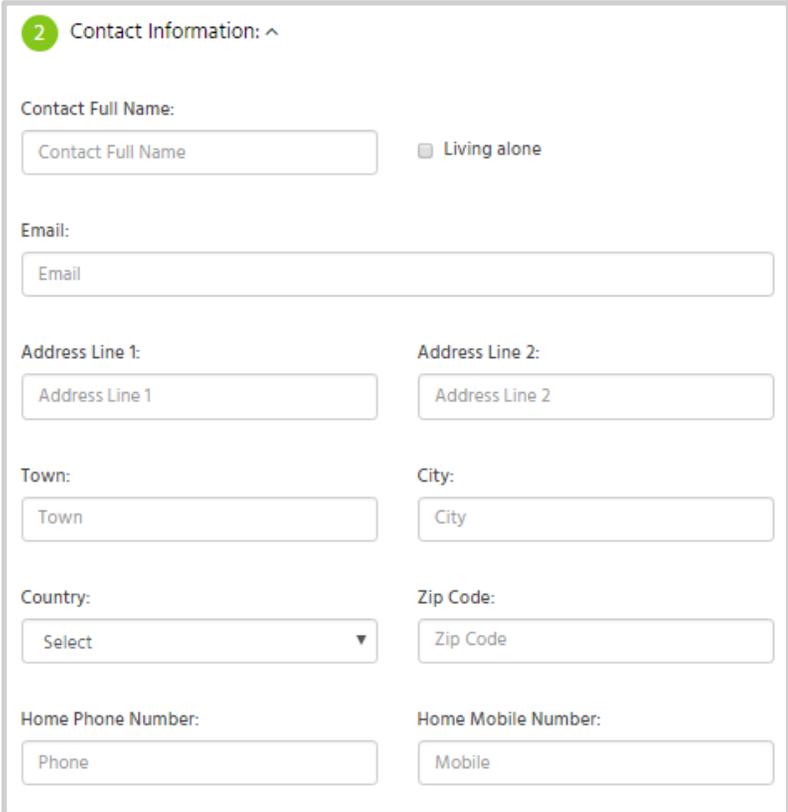
### Address

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.

Enter an email address.

#### Need to add more than one?

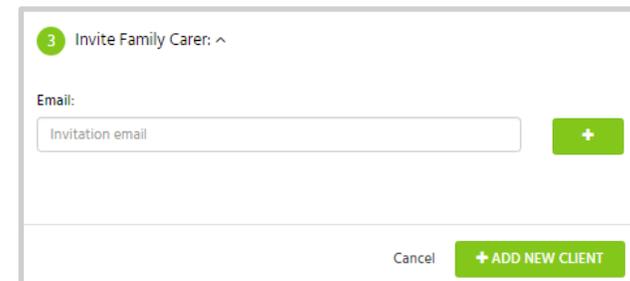
Click on the + button and enter the next email address. Then select **+Add New Client**.

**Note:** If you don't wish to invite anyone now or miss someone, you can add them later under the Family section of the Client's Profile.

**Note:** Be sure to double-check the email address when inviting.

### Remove Family Members

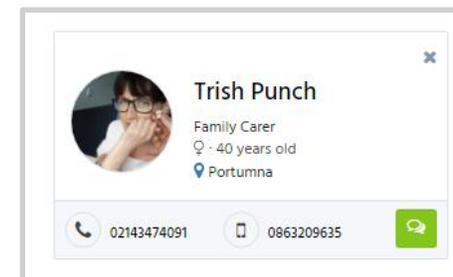
**Made a mistake?** You can remove any family member that you have added later if you need to. In the **Family** section on the client's profile, click **Edit** and then click the **X** in the top right of the Profile Card.



A screenshot of a web form titled "3 Invite Family Carer: ^". It features an "Email:" label above a text input field containing "Invitation email". To the right of the input field is a green button with a white plus sign. At the bottom right of the form are two buttons: a grey "Cancel" button and a green "+ ADD NEW CLIENT" button.



A screenshot of a search bar with the placeholder text "Search by Keyword". To the right of the search bar is a green "+ ADD" button, and further right is a grey "Edit" button with a pencil icon.



A screenshot of a family member profile card for "Trish Punch". The card includes a circular profile picture, the name "Trish Punch", and the role "Family Carer". Below the name, it says "40 years old" and "Portumna". At the bottom of the card, there are three icons: a phone icon with the number "02143474091", a mobile phone icon with the number "0863209635", and a speech bubble icon. A small "X" icon is in the top right corner of the card.



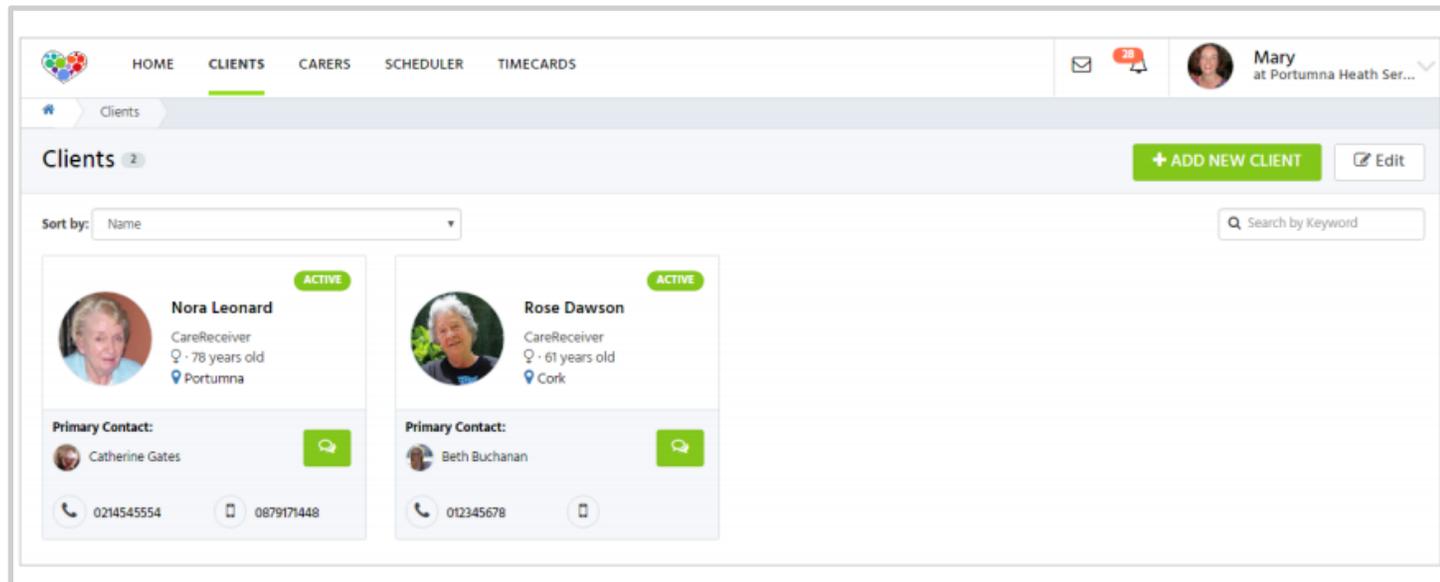
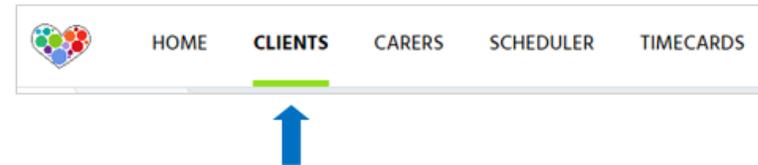
### 3 Adding a Client

#### View and edit Client Profiles



#### 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



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**.