



# Adding Family Members to a Client's Profile



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### Family Section Explained

The involvement of family members in a Client's Care Plan is important as it allows them to be part of the team. Whether they live near or far, using Carefolk bridges the gap and allows Family Members to participate in the Care of their loved one.

When invited to join as part of their loved one's Care Helping Team, Family Members can engage with the Updates on the profile, see **real-time** notes, quickly **communicate** with you or another Carer, or find **support** within the Community.

They can link their profiles to your Client and you can easily locate their phone number or send them a message. There is no confusion about who is who and everyone knows exactly who is involved in the team.

Help your Client and their Family connect by Inviting a Family Member! It only takes a moment.

**Let's Get Started.**

### Benefits of Inviting Family Members

- ✓ One-click Messaging
- ✓ Enhanced Communication
- ✓ Promotes Transparency
- ✓ Easy to Find a Contact Information
- ✓ Encourages Family Support

## 2 Adding Family Members to Client's Profile

### Finding the Family Section

### Find Family Members on a Client's Profile

Your Client's Family are only a few clicks away.

To **View all Family Members**, navigate to your Client's Profile and then **Family**.

Browse through all of the contacts or use the search box to type in a **Name**.

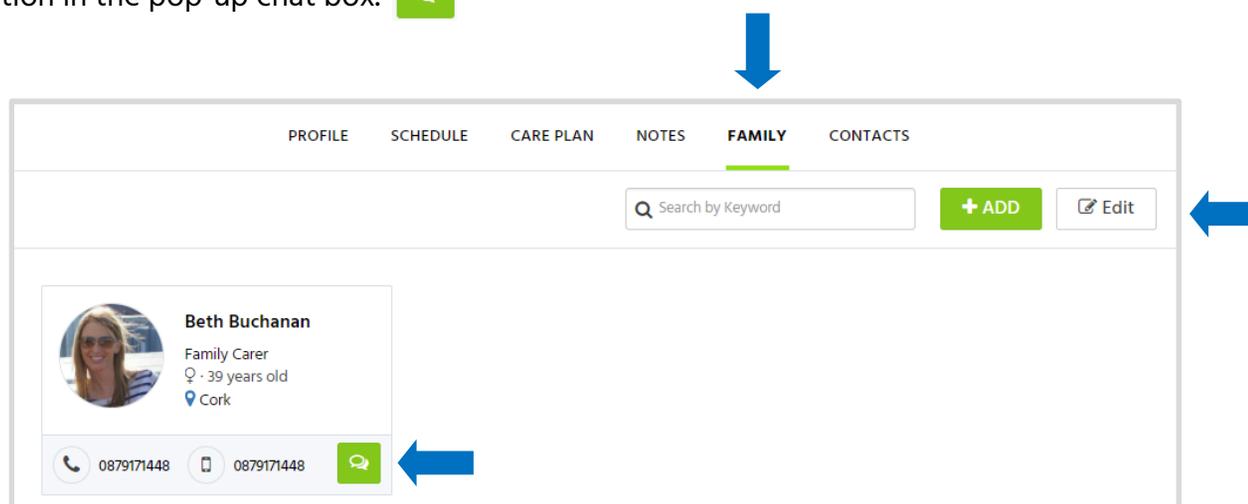
From a **Family Member's card**, you can see their role, age, location, and phone number. To see their **full profile**, click on the card. **Message them** quickly by clicking on the chat icon and start a conversation in the pop-up chat box. 

### Remove a Family Member

Did you accidentally invite the wrong person or need to remove a Family Member?

No problem. Select **Edit** and then click on **X** next to their name.

**Note:** This doesn't delete their profile, only their association with your Client.



# 3 Adding Family Members to Client's Profile

## Invite a Family Member



### Invite a New Family Member

It's easy to **invite family members** to become part of the Care Helping team on your Client's Care Plan.

Begin by typing their **email address** into the box and click **+**.

#### Need to add more than one?

After you click **+**, type the next email address into the box.

When you are finished adding names, then select **+Send Invitations**.

They will receive an email invitation to join Carefolk.

**Note:** Always double-check the email address. You can remove a person later if you need to

The screenshot shows a dialog box titled "Send Invitation to Family Carers" with a close button (X) in the top right corner. Below the title is the label "Email:" followed by a text input field containing the placeholder text "Invitation email". To the right of the input field is a green button with a white plus sign (+). At the bottom of the dialog, there are two buttons: "Cancel" and a green button with a white plus sign and the text "+ SEND INVITATIONS". A blue arrow points to the green "+" button on the right side of the input field.