

Client and Family Portal

A free, secure, and dedicated family portal that keeps everyone informed.

The screenshot displays the CareSmartz360 Client and Family Portal interface. The main section is a calendar titled "Schedule(s)" for January 2022, showing a grid of dates with scheduled care visits. A sidebar on the left contains navigation links: Dashboard, Schedule(s), Invoice(s), Care Plan, and Key Documents. A top navigation bar includes a user profile for Brian Adams and a "MAKE SCHEDULE(S) REQUEST" button. An "Invoice(s)" pop-up window shows a list of invoices with columns for Invoice #, Due date, and Amount (\$). A "Care Alerts" pop-up window at the bottom left shows a search bar and a table for caregiver notes.

Schedule(s)

Today January, 2022

Day Week Month

Sunday	Monday	Tuesday	Wednesday	Thursday
26 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	27 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	28 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	29 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	30 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid
02 5:00PM-11:00PM -Adams, Brian (Pete) [B] 15 Minute Medicaid	03 5:00PM-11:00PM -Adams, Brian (Pete) [B] 15 Minute Medicaid	04 5:00PM-11:00PM -Adams, Brian (Pete) [B] 15 Minute Medicaid	05 7:00AM-3:00PM -Adams, Brian (Gabriella) [B] 8 hr shift - weekdays Companionship	06 7:00AM-3:00PM -Adams, Brian (Rodolfo) Companionship
09 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	10 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	11 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	12 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	13 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid
16 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	17 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	18 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	19 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	20 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid
23 5:00PM-11:00PM -Adams, Brian (Pete) [B] 15 Minute Medicaid	24 5:00PM-11:00PM -Adams, Brian (Pete) [B] 15 Minute Medicaid	25 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	26 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	27 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid
31 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	01 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	02 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	03 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid	04 5:00PM-11:00PM -Adams, Brian (Pete) 15 Minute Medicaid

Invoice(s) [View More](#)

Invoice #	Due	Amount (\$)
INV12642	01/30/2022	\$74.00
INV12625	01/12/2022	\$58.00
INV12626	01/12/2022	\$58.00
INV12620	01/12/2022	\$162.00
INV12621	01/12/2022	\$162.00

Care Alerts
You can review today's latest Caregiver Notes, Caregiver notes for Family via switching the Tabs.

Caregiver Notes Caregiver Notes for Family Caregiver Tools

From 06/02/2022 To 06/09/2022 Search

Status	Caregiver Name	Client Name	Task Subject	Reason/Notes
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One Dashboard for a Quick View

Family Portal helps clients and their family members to quickly view information about care schedules, invoices, care plans, and any vital communication from your home care agency. It's flexible enough to be accessed from anywhere, at any time, and on any device!



Track Schedules & Care Plans

Keep all parties informed about daily, weekly, and monthly schedules while reviewing important visit information such as caregiver details, care notes, ADLs, care plans, etc.



Real-Time Monitoring of Tasks

Users can view and monitor completed care logs as well as current shifts in real-time, including the caregiver's task updates and voice notes.



View Billing History

Empower clients and their families to make quick payments from the dashboard, view how much they are spending on caregiving services, and see their payment status.



Provide Caregiver Feedback

The family portal allows clients and their families to confirm visits using signatures, communicate easily and provide feedback on caregiver visits and service quality.



Inform Changing Care Needs

Reduce unnecessary phone calls and instead empower clients & their families to use the portal to notify the agency of any changes in their requirements or any updated documents.



Secure Family Portal

We take your data and its security very seriously. Our client and family portal is HIPAA compliant, ensuring the safety and security of your data.

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I love how the software is designed for one to access it from anywhere. It is very compatible with tablets, computers, and smartphones. I thoroughly enjoy how the clock-in/clock-out system and the client portal improve caregivers' and clients' experiences, respectively.



Ashlee Lafavor

Owner, Acare Provider Services

#1 Home care management software to transform the way you provide care.



WHY CareSmartz360?

- Fully open & free API for interoperability
- Quick & easy data migration
- Microsoft-backed 360° data security
- World-class user interface
- Award-winning support; <2 min response time

✉ sales@caresmartz360.com

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