



CareTime Reference Guide

CareTime Guide

Table of Contents

| | |
|---|----|
| Participant Registration..... | 3 |
| Add a Family Member..... | 6 |
| Add a Timecard..... | 9 |
| Approve a Timecard..... | 13 |
| Edit a Timecard..... | 15 |
| Approving Changes to Previously Approved Timesheets | 17 |
| Direct Care Professional Registration | 20 |

Contact Information

Phone

(855) 224-5810

Email

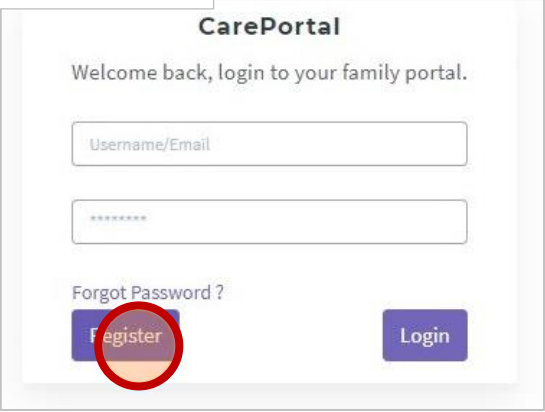
etimesheets@premier-fms.com

In this section, we will review how to create your new CareTime account as a Participant.

Participant Registration

1 Navigate to:
<https://careportal.caretimeapp.com/#/auth/login>

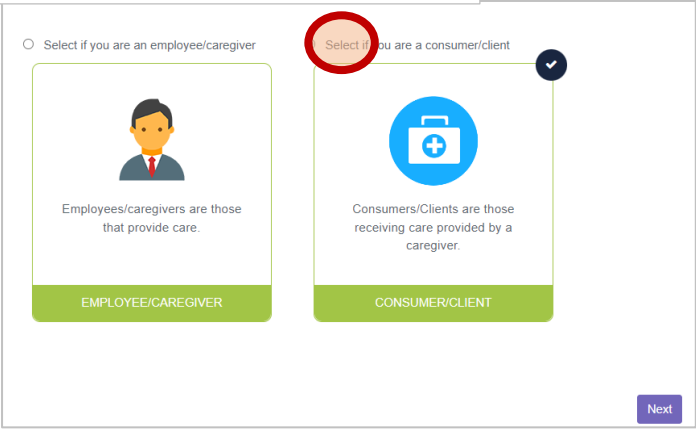
2 Click "Register"



CarePortal
Welcome back, login to your family portal.
Username/Email

Forgot Password ?
Register Login

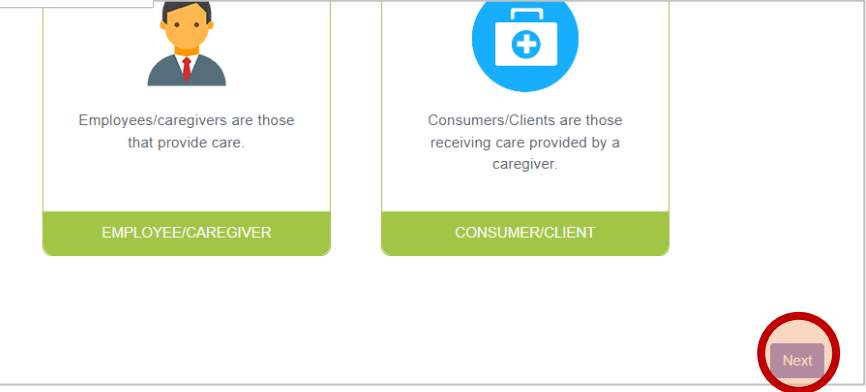
3 Click the option for "Select if you are a consumer/client"



Select if you are an employee/caregiver
 Select if you are a consumer/client

EMPLOYEE/CAREGIVER CONSUMER/CLIENT
Next

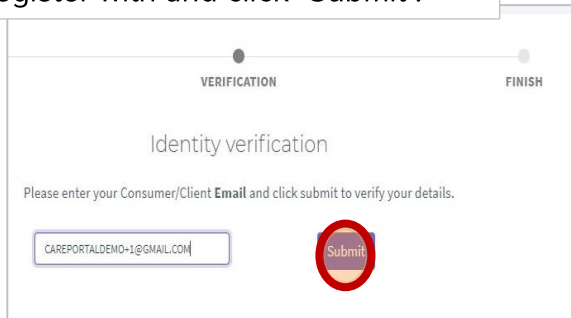
4 Click "Next"



EMPLOYEE/CAREGIVER CONSUMER/CLIENT
Next

5

Enter your email that you'd like to register with and click "Submit".

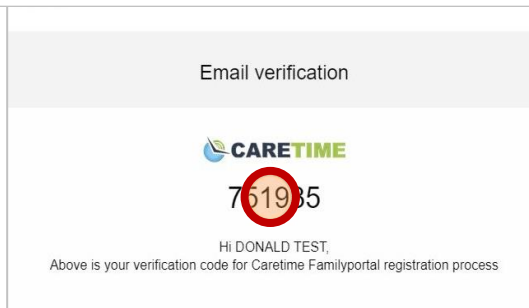


The screenshot shows a web page titled "Identity verification" with progress indicators for "VERIFICATION" and "FINISH". Below the title, it says "Please enter your Consumer/Client Email and click submit to verify your details." There is a text input field containing "CAREPORTALDEMO-1@GMAIL.COM" and a "Submit" button, both of which are circled in red.

NOTE: If you receive an error at this point that the email is not on file, follow up with Premier to update your email on file. You will not be able to register until it is updated.

6

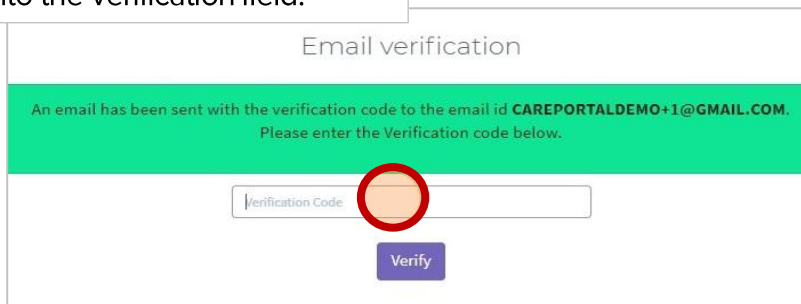
You will receive an email with a verification code. Open the email and copy the code.



The screenshot shows an email titled "Email verification" with the CareTime logo. The verification code "751935" is displayed in a large font and circled in red. Below the code, it says "Hi DONALD TEST, Above is your verification code for Caretime Familyportal registration process".

7

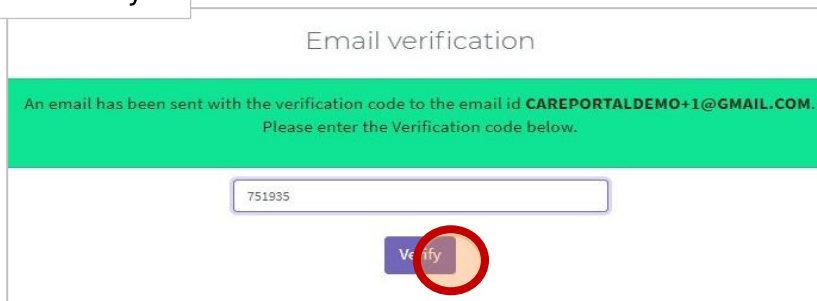
Enter the code from the email into the verification field.



The screenshot shows the "Email verification" page with a green banner that reads: "An email has been sent with the verification code to the email id CAREPORTALDEMO+1@GMAIL.COM. Please enter the Verification code below." Below the banner is a text input field labeled "Verification Code" with the code "751935" entered, and a "Verify" button. Both the input field and the button are circled in red.

8

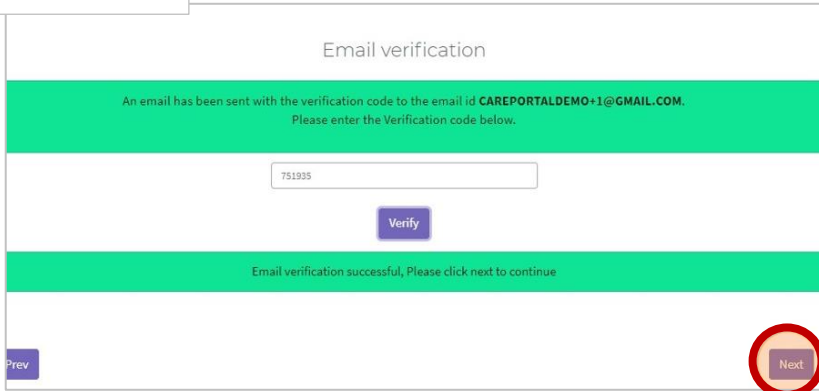
Click "Verify"



The screenshot shows the "Email verification" page with the same green banner as in step 7. The "Verification Code" input field now contains "751935" and the "Verify" button is circled in red.

9

Click "Next"



Email verification

An email has been sent with the verification code to the email id CAREPORTALDEMO+1@GMAIL.COM.
Please enter the Verification code below.

751935

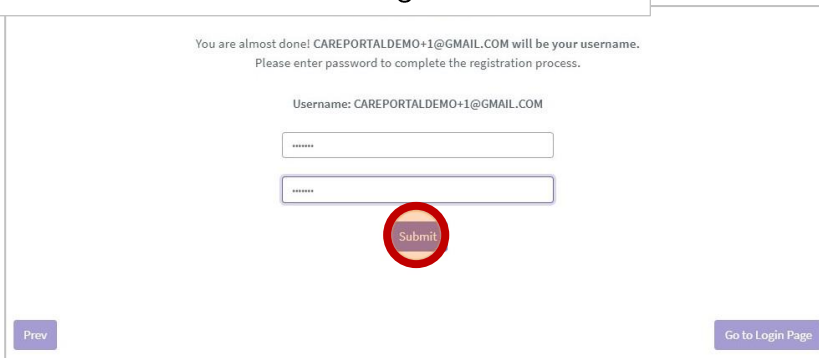
Verify

Email verification successful, Please click next to continue

Prev Next

10

Enter in the password that you want to set for your CarePortal login. Once you enter it, click "Submit". Then click "Go to Login"



You are almost done! CAREPORTALDEMO+1@GMAIL.COM will be your username.
Please enter password to complete the registration process.

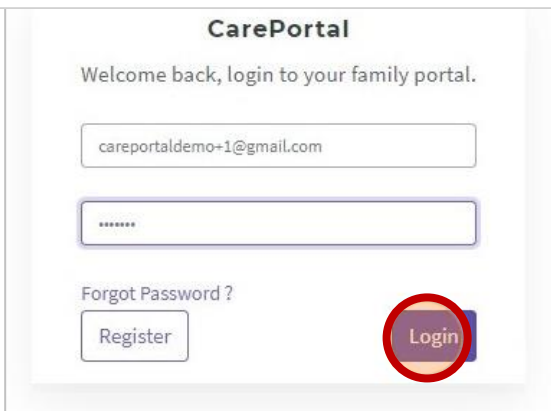
Username: CAREPORTALDEMO+1@GMAIL.COM

Submit

Prev Go to Login Page

11

Once you're back on the log in page, enter your log in information and click "Login". Your username is the email you used to register and the password is the one you just created.



CarePortal

Welcome back, login to your family portal.

careportaldemo+1@gmail.com

Forgot Password ?

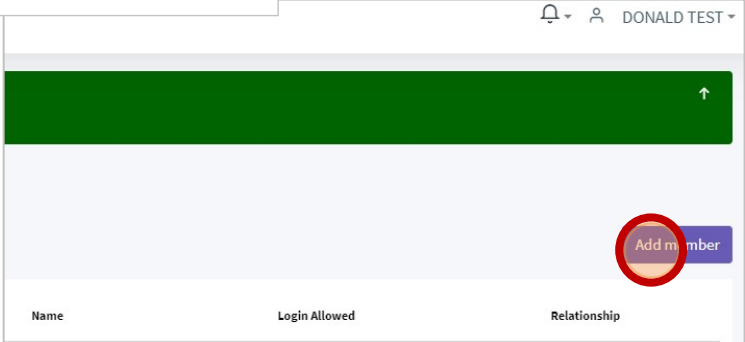
Register Login

In this section, we will walk through the steps for how to add a family member. Family members can help you navigate CareTime and EVV use.

Add a Family Member

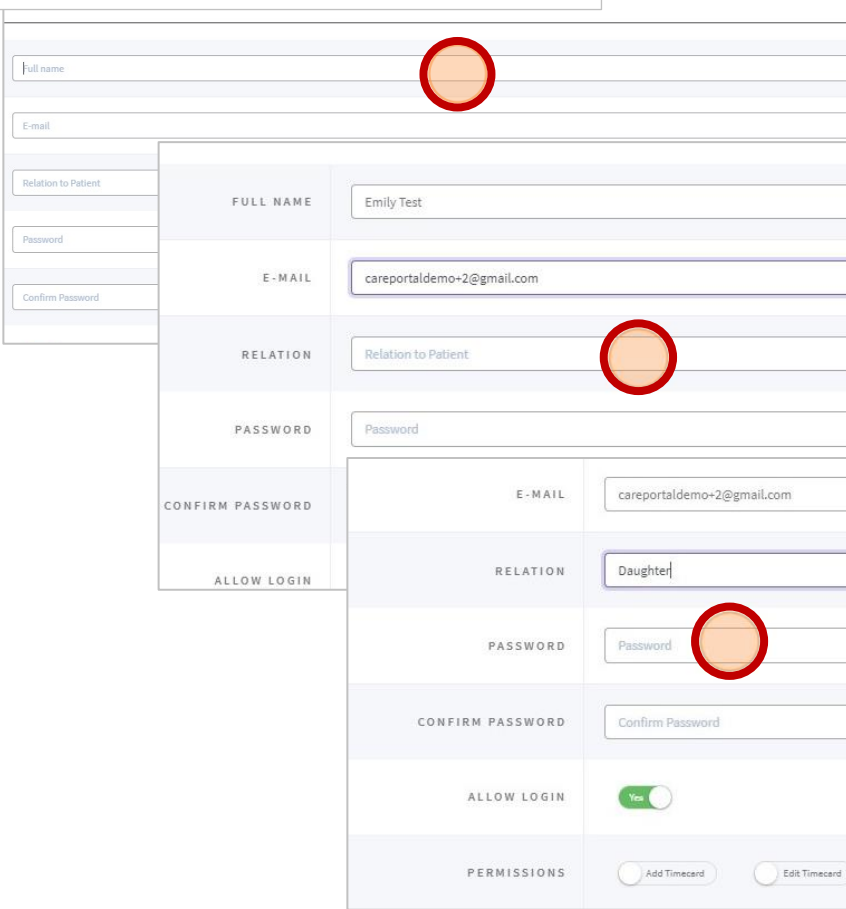
1 Navigate to:
<https://careportal.caretimeapp.com/#/family-members/all>

2 Click "Add member"



The screenshot shows the top navigation bar with a bell icon, a user profile icon, and the name 'DONALD TEST'. Below the navigation bar is a green header bar with an upward arrow. The main content area is mostly blank, with a blue 'Add member' button circled in red in the bottom right corner. At the bottom of the screen, there are three columns: 'Name', 'Login Allowed', and 'Relationship'.

3 Enter the details for the family member including their name, email, relation, and enter a password for them.



The screenshot shows the 'Add member' form with several fields. The 'Full name' field contains 'Emily Test', the 'E-MAIL' field contains 'careportaldemo-2@gmail.com', and the 'RELATION' field contains 'Relation to Patient'. The 'PASSWORD' field contains 'Password'. The 'CONFIRM PASSWORD' field is empty. The 'ALLOW LOGIN' field has a 'Yes' toggle switch. The 'PERMISSIONS' section includes buttons for 'Add Timecard', 'Edit Timecard', 'Add Shift', 'Edit Shift', and 'Add Family Member'. Red circles highlight the 'Full name', 'Relation to Patient', and 'Password' fields.

4

Next select what permissions you want to give the family member. The permissions available are the ability to add and edit timecards, add a family member, and view family members.

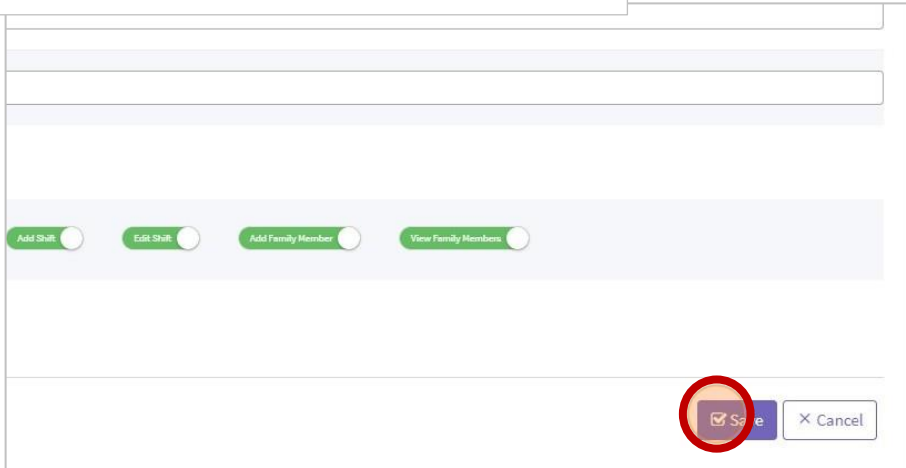
| | |
|--|---|
| PASSWORD | <input type="text" value="Password"/> |
| CONFIRM PASSWORD | <input type="text" value="Confirm Password"/> |
| ALLOW LOGIN | <input checked="" type="checkbox"/> Yes |
| PERMISSIONS | <input checked="" type="radio"/> Add Timecard <input type="radio"/> Edit Timecard <input type="radio"/> Add Family Member <input type="radio"/> View Family Members |
| STATUS | <input checked="" type="checkbox"/> Active |
| <input checked="" type="checkbox"/> Save <input type="checkbox"/> X Cancel | |

| | |
|--|---|
| PASSWORD | <input type="text" value="Password"/> |
| CONFIRM PASSWORD | <input type="text" value="Confirm Password"/> |
| ALLOW LOGIN | <input checked="" type="checkbox"/> Yes |
| PERMISSIONS | <input checked="" type="checkbox"/> Add Timecard <input checked="" type="radio"/> Edit Timecard <input type="radio"/> Add Family Member <input type="radio"/> View Family Members |
| STATUS | <input checked="" type="checkbox"/> Active |
| <input checked="" type="checkbox"/> Save <input type="checkbox"/> X Cancel | |

| | |
|--|---|
| PASSWORD | <input type="text" value="Password"/> |
| CONFIRM PASSWORD | <input type="text" value="Confirm Password"/> |
| ALLOW LOGIN | <input checked="" type="checkbox"/> Yes |
| PERMISSIONS | <input checked="" type="checkbox"/> Add Timecard <input checked="" type="checkbox"/> Edit Timecard <input checked="" type="radio"/> Add Family Member <input type="radio"/> View Family Members |
| STATUS | <input checked="" type="checkbox"/> Active |
| <input checked="" type="checkbox"/> Save <input type="checkbox"/> X Cancel | |

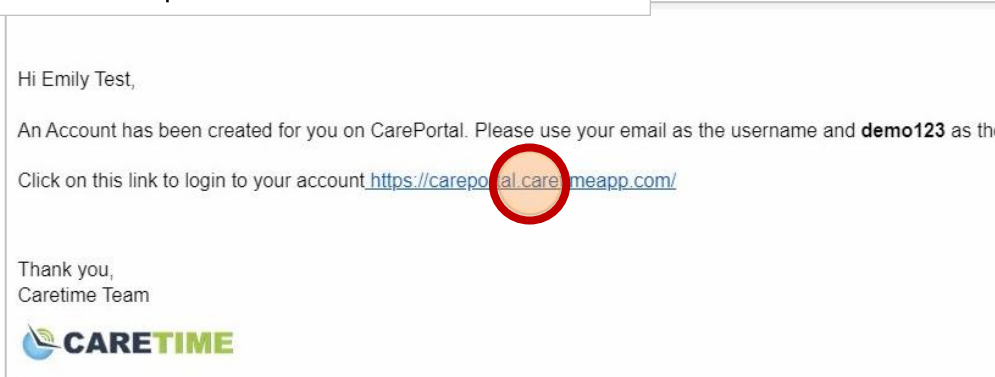
5

Once you have completed the set up you want for the family member, click "Save".



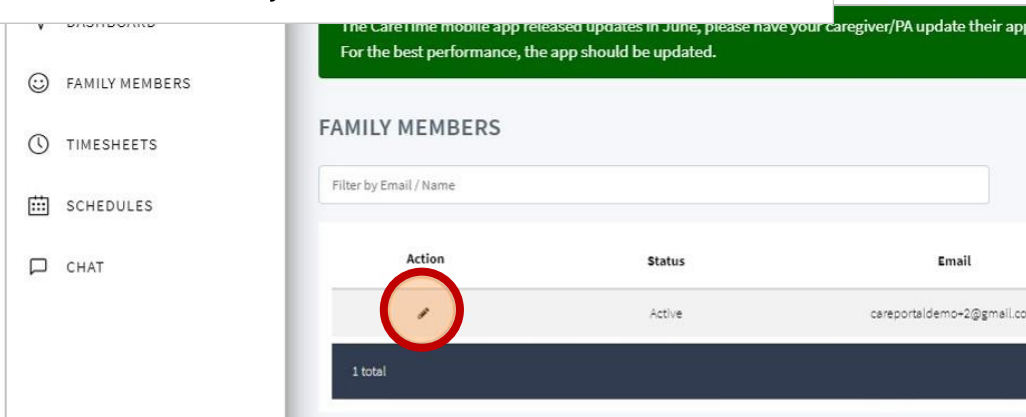
6

The family member will then receive an email notifying them of their new CarePortal account and password.



7

After adding the family member, if you need to change details or permissions, you can always click on the pencil icon to edit the family member.



In this section, we will walk through the steps to add a new timecard to an existing timesheet.

Add a Timecard



In order for you to add a timecard for a Direct Care Professional (DCP) in CarePortal, Premier must create the relationship, so the DCP will show up in your dropdown.

If you do not see the Direct Care Professional in the dropdown, contact Premier to add them.

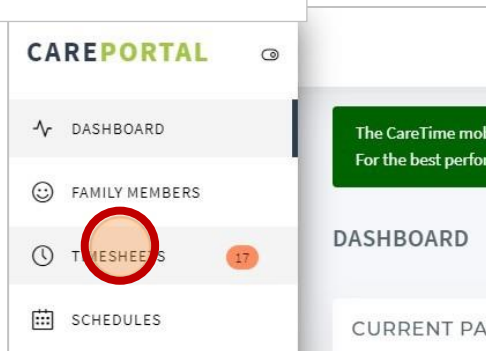
1

Navigate to:

<https://careportal.caretimeapp.com/#/dashboard>

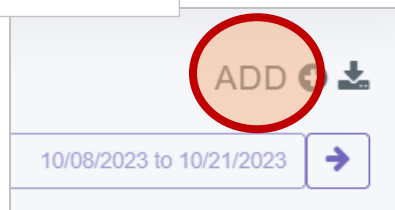
2

Click "TIMESHEETS"



3

Click "ADD"



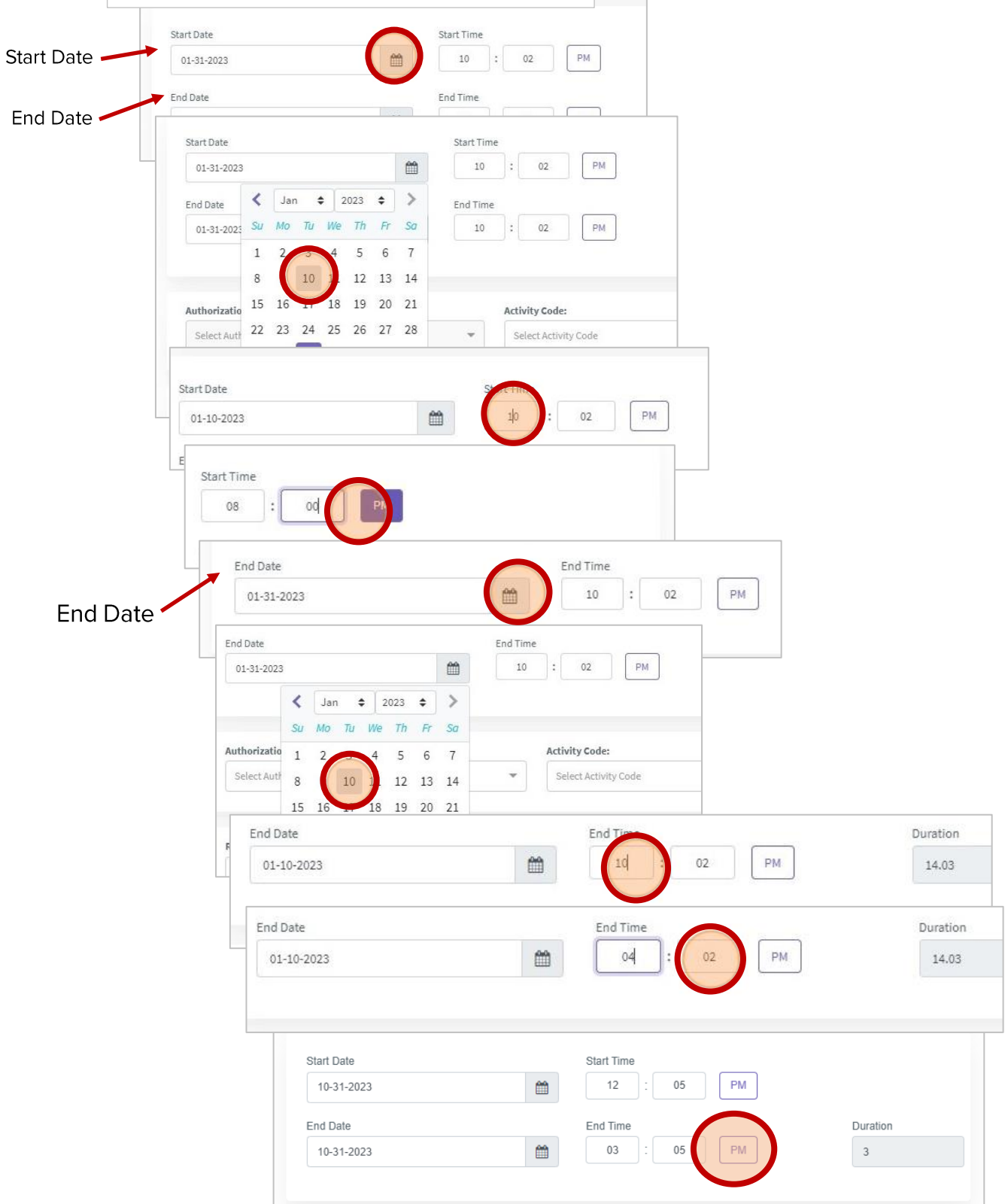
4

Select the Direct Care Professional that you want to add the timecard for.

NOTE: If you do not see the Direct Care Professional in the dropdown to add the shift, contact Premier to add them.

5

Enter in the Start Date and Time and the End Date and Time for the Timecard.

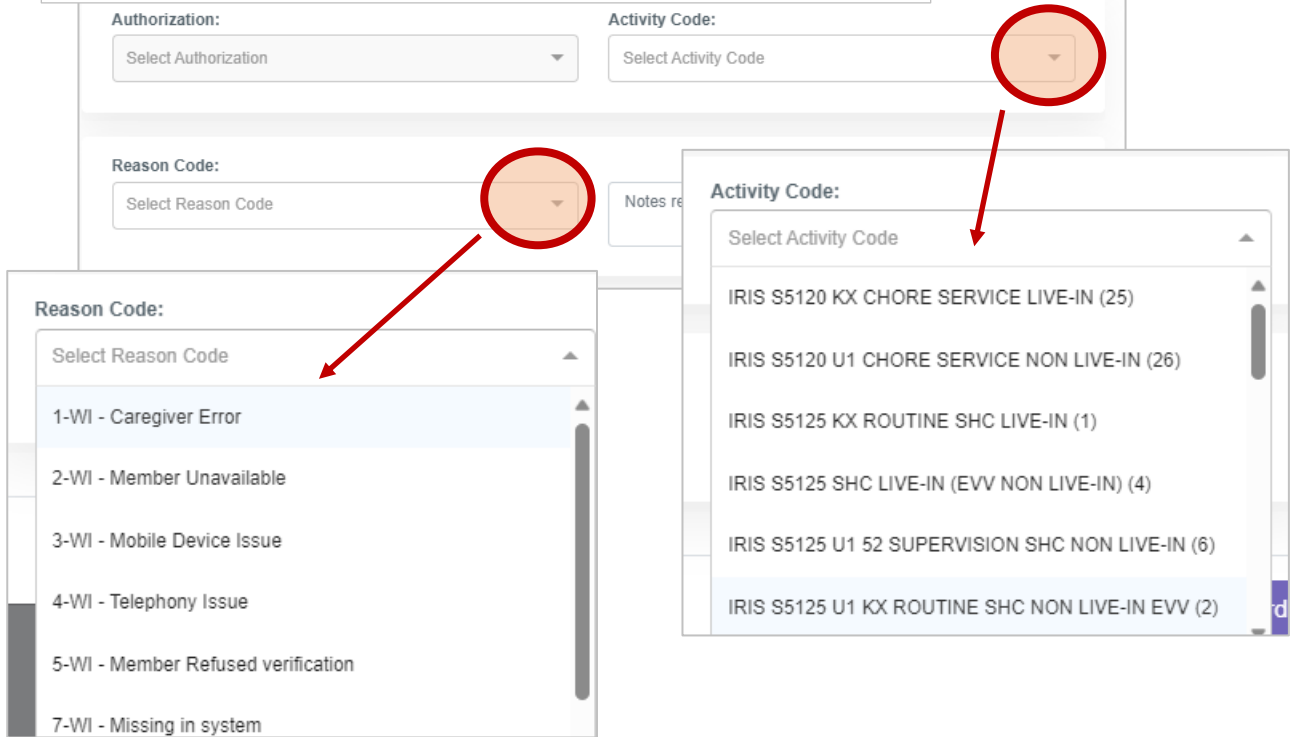


The screenshots illustrate the following steps:

- Start Date:** The first screenshot shows the 'Start Date' field with '01-31-2023' and a calendar icon. A red circle highlights the calendar icon.
- End Date:** The second screenshot shows the 'End Date' field with a calendar icon. A red circle highlights the calendar icon. A calendar popup is shown with the date '10' highlighted.
- Start Time:** The third screenshot shows the 'Start Time' field with '10 : 02 PM'. A red circle highlights the time selection area.
- End Time:** The fourth screenshot shows the 'End Time' field with '10 : 02 PM'. A red circle highlights the time selection area.
- End Date (Detailed):** The fifth screenshot shows the 'End Date' field with '01-31-2023' and a calendar icon. A red circle highlights the calendar icon. A calendar popup is shown with the date '10' highlighted.
- Final Entry:** The final screenshot shows a completed entry with 'Start Date' 10-31-2023, 'Start Time' 12 : 05 PM, 'End Date' 10-31-2023, 'End Time' 03 : 05 PM, and a 'Duration' of 3.

6

Enter the Activity Code and Reason Code into the Timecard.



The screenshot shows a timecard entry form with the following fields:

- Authorization:** Select Authorization (dropdown)
- Activity Code:** Select Activity Code (dropdown)
- Reason Code:** Select Reason Code (dropdown)
- Notes re** (text field)

The Reason Code dropdown is expanded, showing the following options:

- Select Reason Code
- 1-WI - Caregiver Error
- 2-WI - Member Unavailable
- 3-WI - Mobile Device Issue
- 4-WI - Telephony Issue
- 5-WI - Member Refused verification
- 7-WI - Missing in system

The Activity Code dropdown is also expanded, showing the following options:

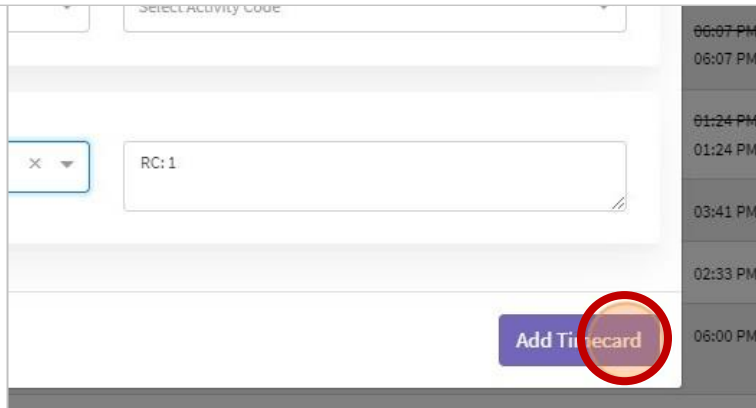
- Select Activity Code
- IRIS S5120 KX CHORE SERVICE LIVE-IN (25)
- IRIS S5120 U1 CHORE SERVICE NON LIVE-IN (26)
- IRIS S5125 KX ROUTINE SHC LIVE-IN (1)
- IRIS S5125 SHC LIVE-IN (EVV NON LIVE-IN) (4)
- IRIS S5125 U1 52 SUPERVISION SHC NON LIVE-IN (6)
- IRIS S5125 U1 KX ROUTINE SHC NON LIVE-IN EVV (2)

Activity Code is the type of service you received.

Reason Code is the reason why you are adding the shift - e.g. "Caregiver error" might be used when a Direct Care Professional forgot to clock in and out for the original shift.

7

Once you have entered all the details, click "Add Timecard"



The screenshot shows a form with a 'Select Activity Code' dropdown, a search box containing 'RC: 1', and a vertical list of time slots on the right: 06:07 PM, 01:24 PM, 03:41 PM, 02:33 PM, and 06:00 PM. A blue button labeled 'Add Timecard' is circled in red at the bottom right of the form.

8

If there are any overlaps or errors, CarePortal will alert you. An overlap occurs when one shift has not yet ended and another shift has started resulting in some of the hours overlapping with each other.

- To fix the errors, click "**No, Close**" and update the timecard to resolve the error (such as an overlap).



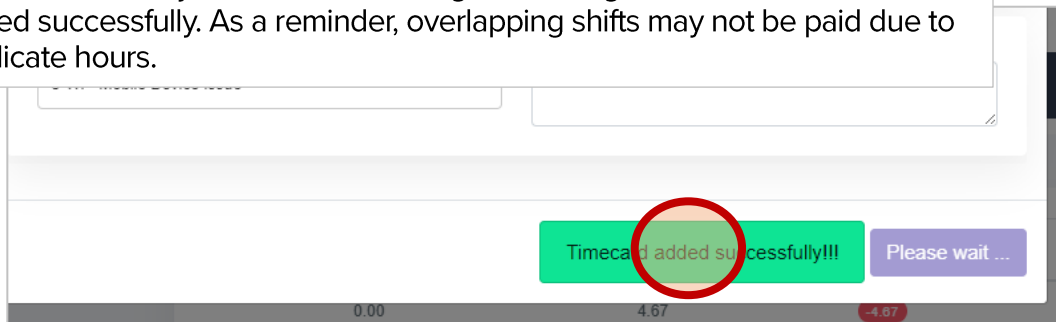
The dialog box has the title 'Timecard Overlap detected!!!' and the question 'Still, You want to submit the timecard?'. It contains a table with the following data:

| Date | IN | OUT | Client | Employee |
|------------|----------|----------|---------------|---------------|
| 01/10/2023 | 10:49 AM | 10:53 AM | WILLOWS, TEST | DUCK, DONALD |
| 01/10/2023 | 02:46 PM | 02:48 PM | WILLOWS, TEST | DUCK, DONALD |
| 01/10/2023 | 03:38 PM | 03:41 PM | WILLOWS, TEST | YEREMN, MARIA |

At the bottom of the dialog are two buttons: a green '1 of 2 Warning Yes, Next' button and a red 'No, Close' button, which is circled in red. An 'Add Timecard' button is visible in the background.

9

If there are no overlaps detected, you will see a message indicating the timecard was added successfully. If there is an overlap detected and you select 'Yes, Next', you will see a message indicating that the timecard was added successfully. As a reminder, overlapping shifts may not be paid due to duplicate hours.



The screenshot shows a confirmation message 'Timecard added successfully!!!' in a green box, with the text circled in red. To the right is a 'Please wait ...' button. At the bottom, there are numerical values: 0.00, 4.67, and -4.67.

In this user guide, we will walk through the steps for participants to approve their workers' timesheets.

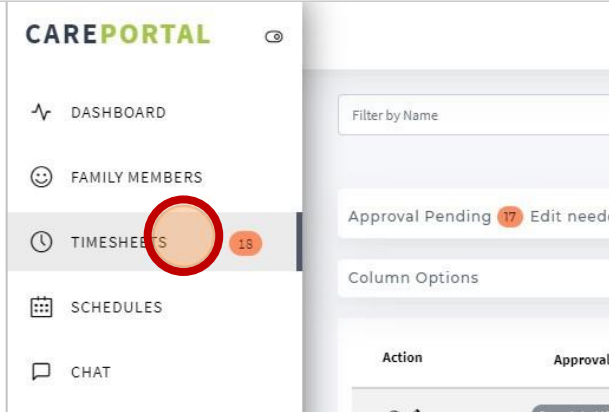
Approve a Timecard

1

Navigate to:
<https://careportal.caretimeapp.com/#/timelog>

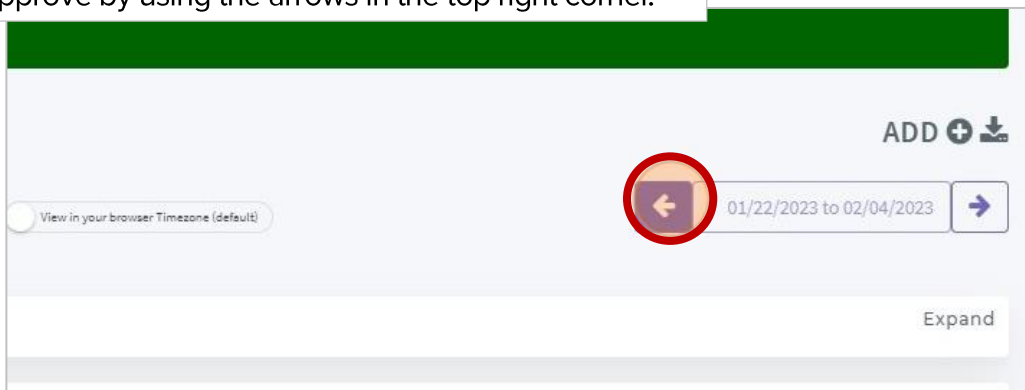
2

To approve the timecards for a particular pay period, Click on "TIMESHEETS".



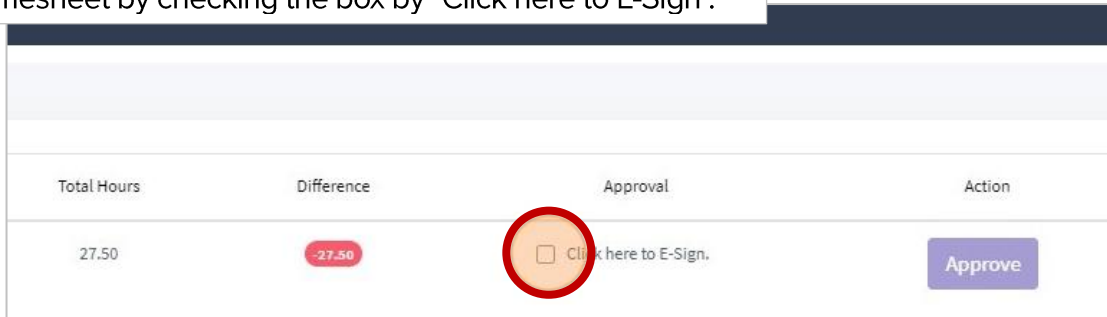
3

Navigate to the pay period that you are looking to approve by using the arrows in the top right corner.



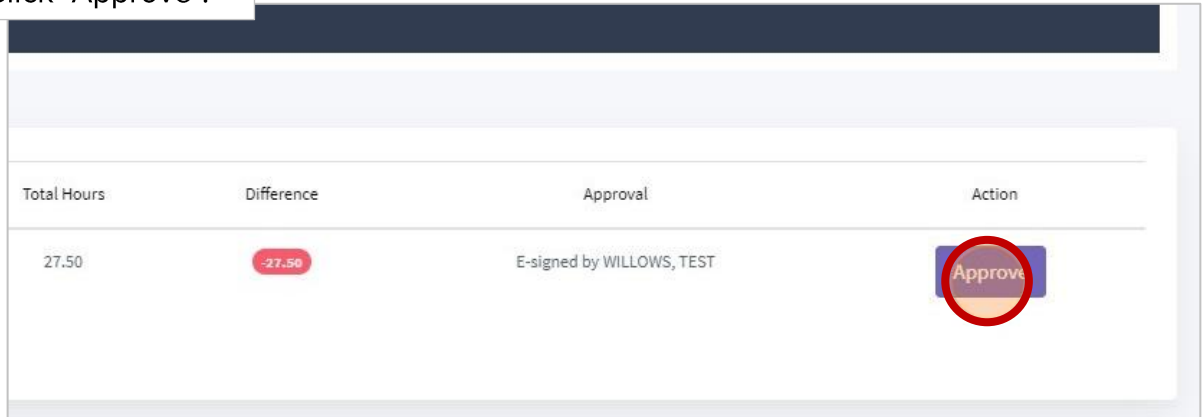
4

Once you open the timesheet to approve, first e-sign the timesheet by checking the box by "Click here to E-Sign".



5

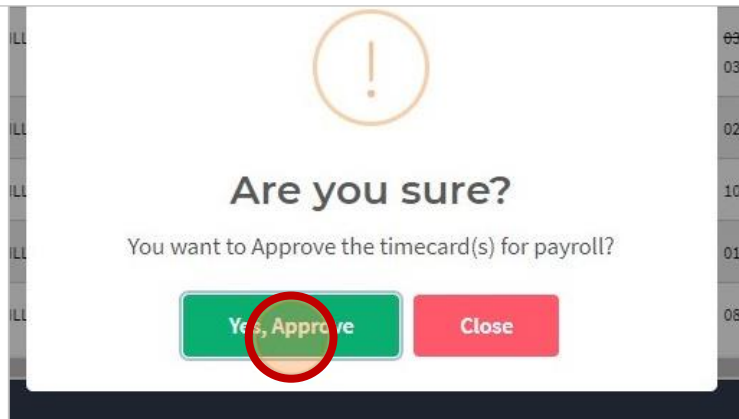
Click "Approve".



| Total Hours | Difference | Approval | Action |
|-------------|------------|---------------------------|--|
| 27.50 | -27.50 | E-signed by WILLOWS, TEST | <input type="button" value="Approve"/> |

6

A pop up will appear asking you to confirm the approval. Click "Yes, Approve". The visits on the sheet will then show as "Approved for Payroll"

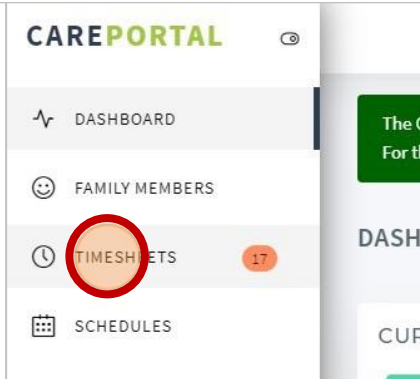


In this user guide, we will review how to edit a timecard in the CareTime portal.

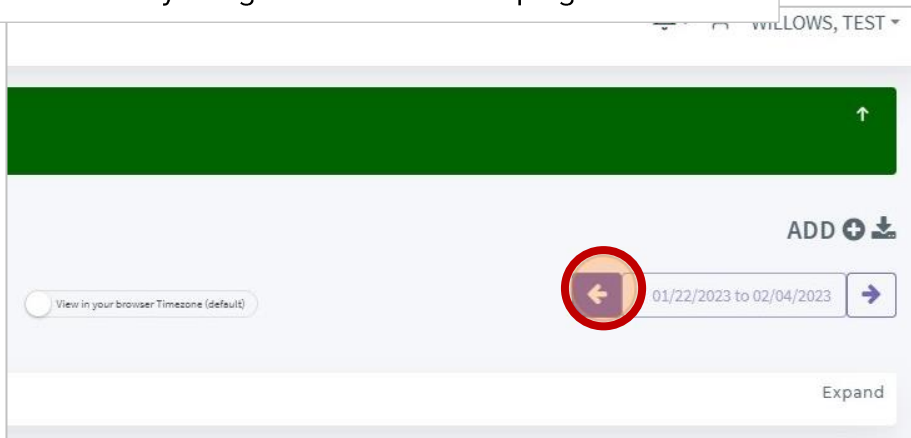
Edit a Timecard

1 Navigate to:
<https://careportal.caretimeapp.com/#/dashboard>

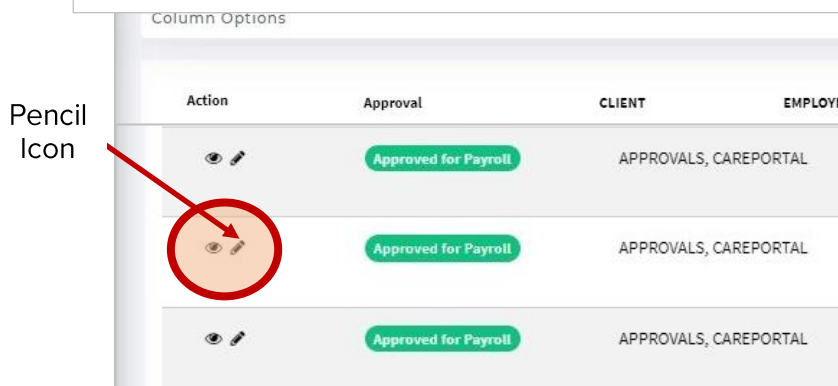
2 Click "TIMESHEETS" to review the timecards for your Direct Care Professional.



3 Navigate to the pay period that you are looking to edit visits within by using the arrows in the top right corner.

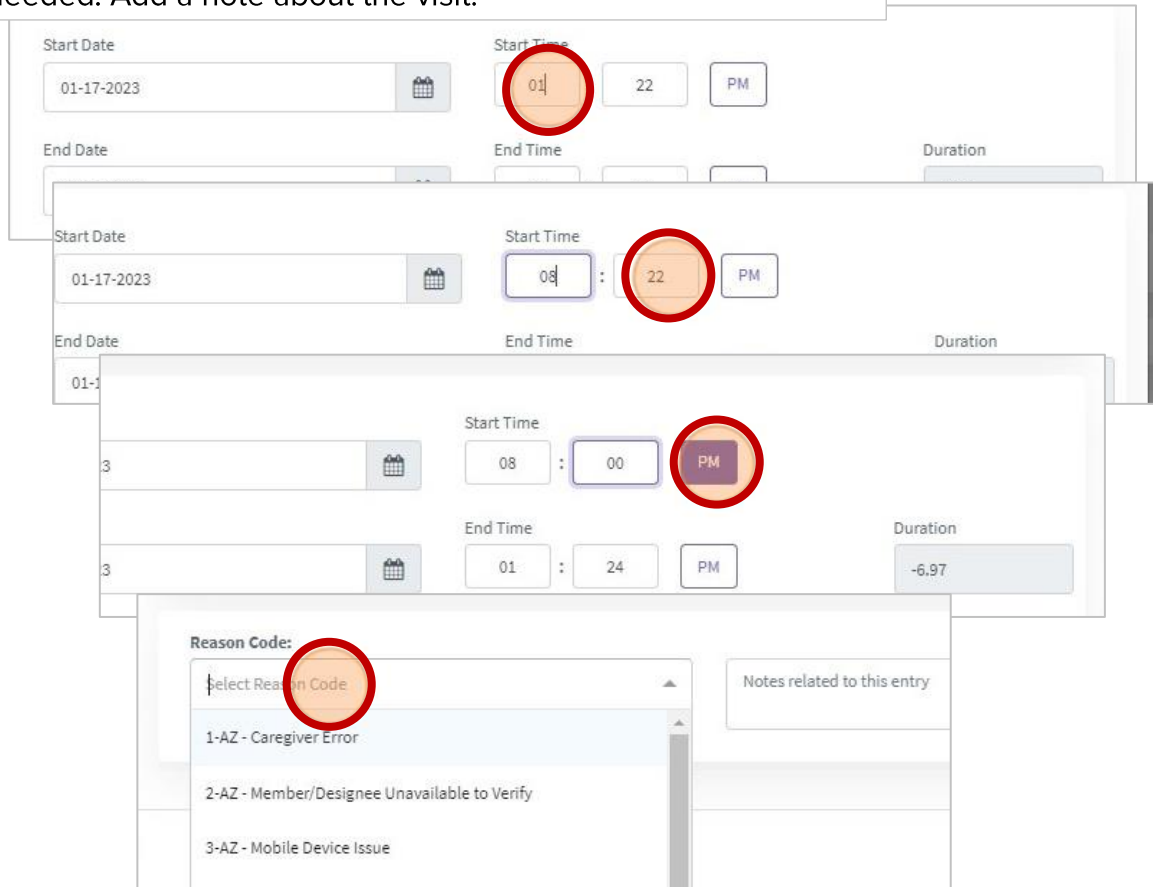


4 To edit the selected visit, click on the pencil icon on the visit.



5

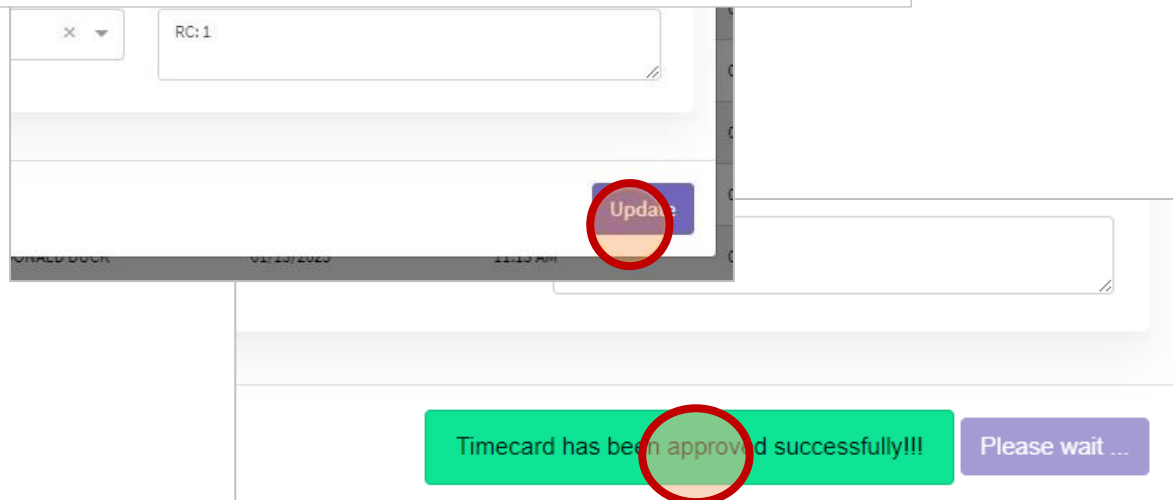
Make the edits you need to the timecard. You can edit the start and end date or time. Enter a Reason Code for the edit. If needed: Add a note about the visit.



The screenshot displays a timecard entry form with several fields. The 'Start Date' is set to 01-17-2023. The 'Start Time' is 01:22 PM. The 'End Date' is also 01-17-2023. The 'End Time' is 08:00 PM. The 'Duration' is -6.97. A 'Reason Code' dropdown menu is open, showing options: '1-AZ - Caregiver Error', '2-AZ - Member/Designee Unavailable to Verify', and '3-AZ - Mobile Device Issue'. The 'Notes related to this entry' field is empty.

6

Once you have completed the edits you want to make, click "Update". The changes will be applied to the Timecard.



The screenshot shows the 'Update' button being clicked. Below the form, a green notification bar displays the message: 'Timecard has been approved successfully!!!'. A 'Please wait ...' button is also visible.

In this user guide, we will walk through the steps to review and approve an edited timecard that you previously approved.

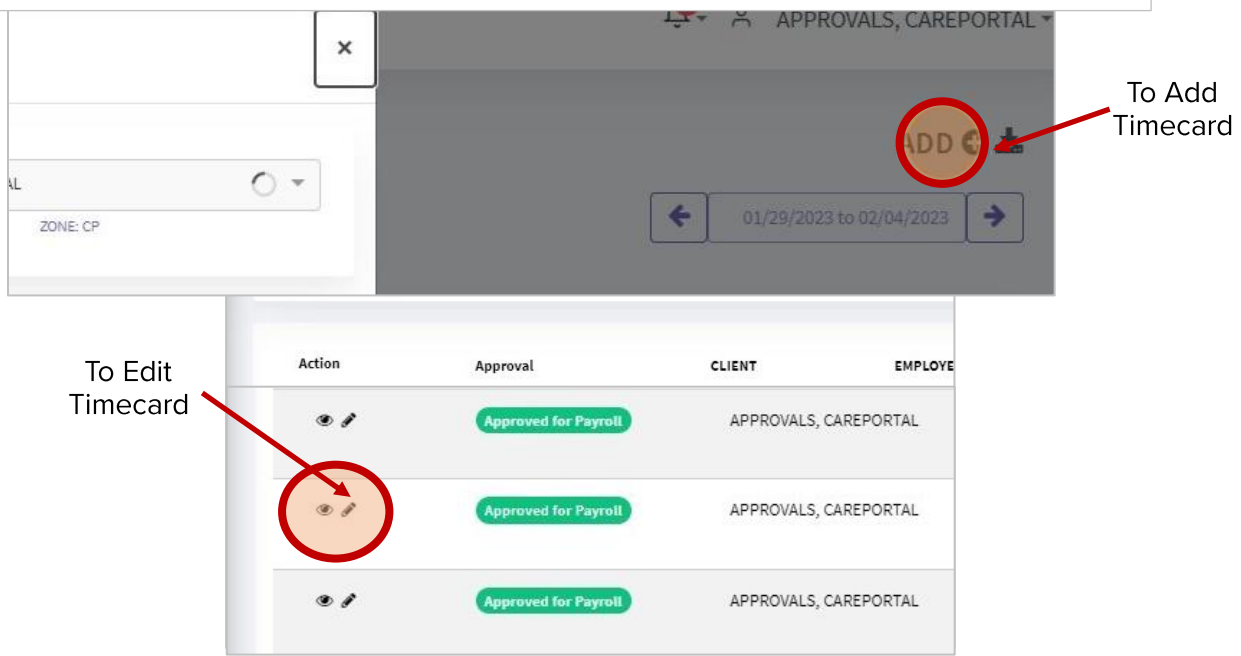
Approving Changes to Previously Approved Timesheets

1

Navigate to:
<https://careportal.caretimeapp.com/#/auth/timelog>

2

Navigate to the timesheet that you want to **either make an edit on or add a new shift**. Since the timesheet was already approved, all of the timecards will show as “Approved for Payroll”. Click the pencil icon on a timecard to edit or click “Add” in the top right corner to add a new timecard.



3

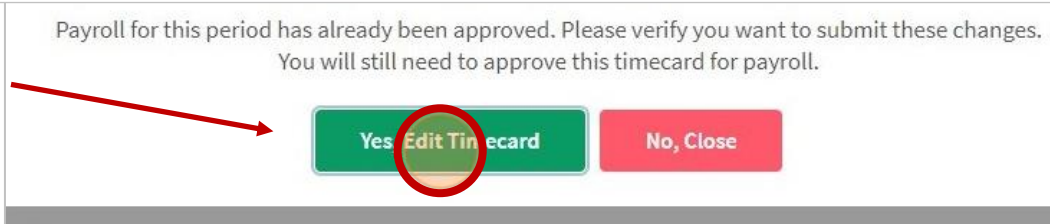
Once you have completed entering the information to edit the timecard click “Update”. The changes will be applied to the timecard.



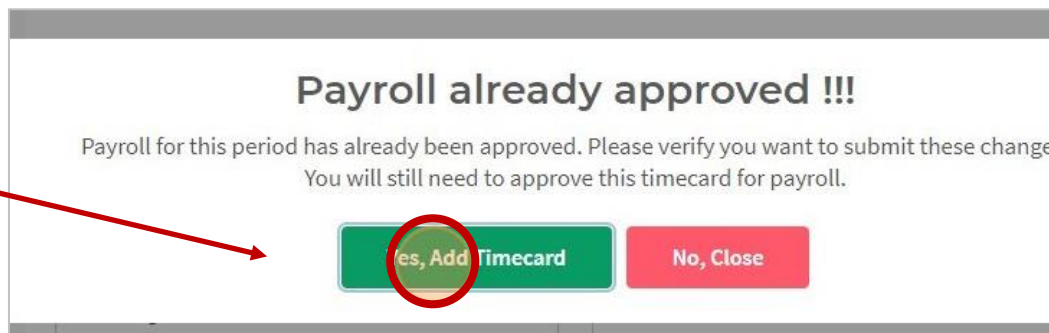
4

A warning message will pop up to remind you that since the timesheet was already approved that you must go and individually approve the newly edited timecard in order for it to show as approved. If you want to go through the change, click "Yes, Edit Timecard". If you want to add a timecard, "Yes, Add Timecard".

If editing a timecard, click "Yes, Edit Timecard"






If adding a timecard, click "Yes, Add Timecard"



5

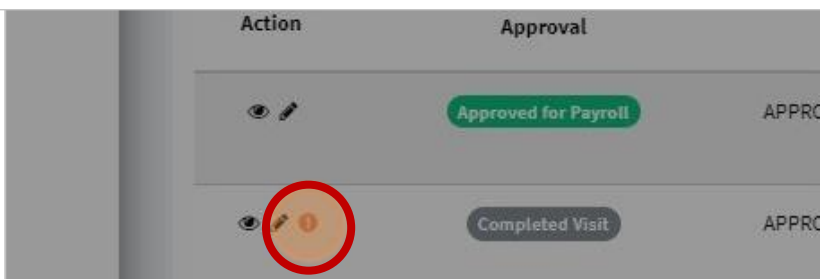
Once you have confirmed, the newly edited or added shift will show on the timesheet as a "Completed Visit" rather than "Approved for Payroll". An orange circle with an exclamation point will show on the timecard to alert you that the timecard is unapproved.

Orange Edit Circle

| Action | Approval | CLIENT | CAREGIVERS |
|---|----------------------|-----------------------|------------------|
|  | Approved for Payroll | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |
|  | Completed Visit | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |
|  | Approved for Payroll | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |

6







In order to approve that timecard, click on the orange icon.



7 Click "Yes, Approve" to approve the timecard.



8 Once you have approved the timecard, the status of the timecard will show as "Approved for Payroll".

| Action | Approval | CLIENT | CAREGIVERS |
|---|----------------------|-----------------------|------------------|
|   | Approved for Payroll | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |
|   | Approved for Payroll | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |
|   | Approved for Payroll | APPROVALS, CAREPORTAL | SAMPLE CAREGIVER |



You will need to approve any timecards that Premier adds through CareTime.

If the timecards are added before you approve the timesheet, you will be able to edit and approve as normal.

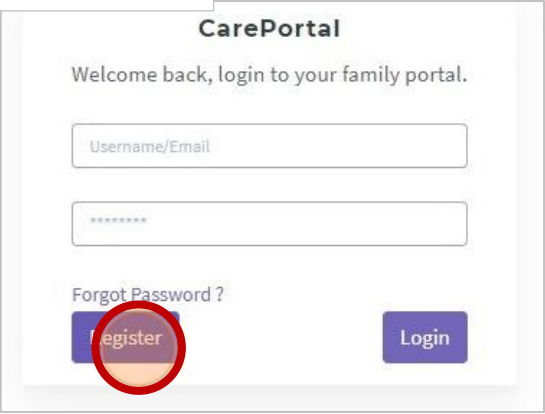
If Premier adds timecards after you approved the timesheet, you will need to approve the individual timecard following the seven steps in this Guide.

In this user guide, we will review how to create your new CareTime account as a worker.

Direct Care Professional
Registration

1 Navigate to:
<https://careportal.caretimeapp.com/#/auth/login>

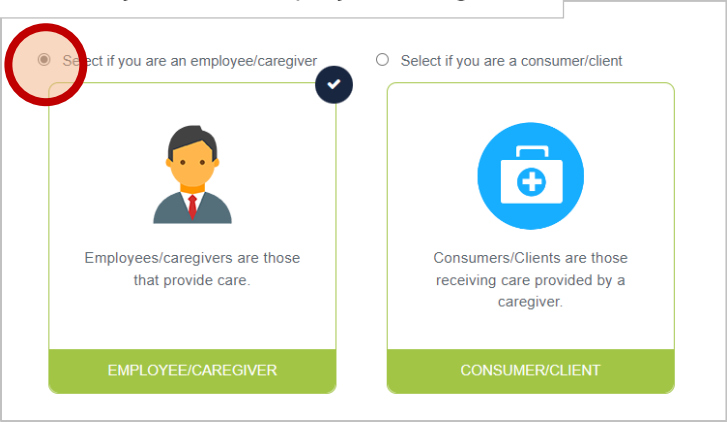
2 Click "Register"



CarePortal
Welcome back, login to your family portal.
Username/Email

Forgot Password ?
Register Login

3 Click the option for "Select if you are a employee/caregiver"



Select if you are an employee/caregiver Select if you are a consumer/client
EMPLOYEE/CAREGIVER CONSUMER/CLIENT

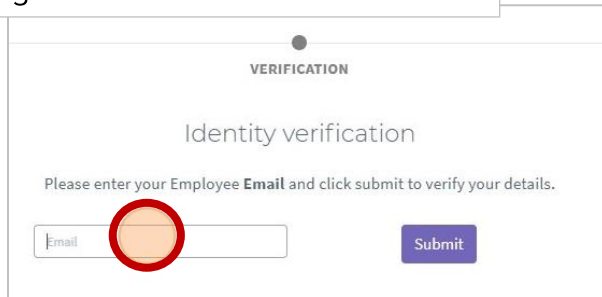
4 Click "Next"



Consumers/Clients are those receiving care provided by a caregiver.
CONSUMER/CLIENT
Next

5

Enter your email that you'd like to register with and click "Submit".



VERIFICATION

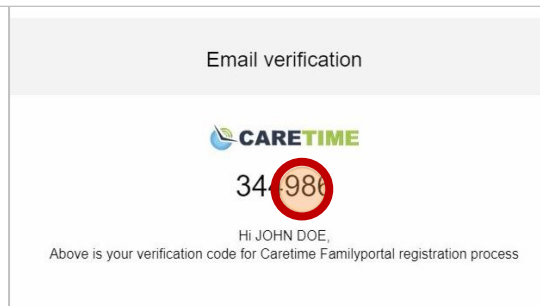
Identity verification

Please enter your Employee Email and click submit to verify your details.


Email

6

You will receive an email with a verification code. Open the email and copy the code.



Email verification

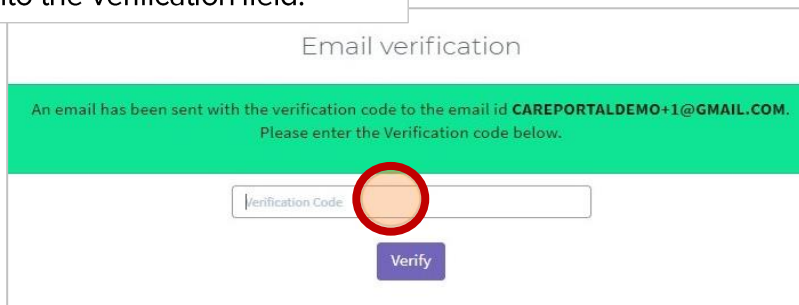


344986

Hi JOHN DOE,
Above is your verification code for Caretime Familyportal registration process

7

Enter the code from the email into the verification field.



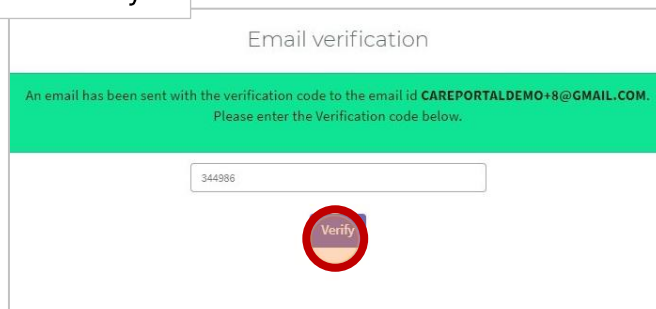
Email verification

An email has been sent with the verification code to the email id CAREPORTALDEMO+1@GMAIL.COM.
Please enter the Verification code below.

Verification Code

8

Click "Verify".




Email verification

An email has been sent with the verification code to the email id CAREPORTALDEMO+8@GMAIL.COM.
Please enter the Verification code below.

344986

9

Click "Next"



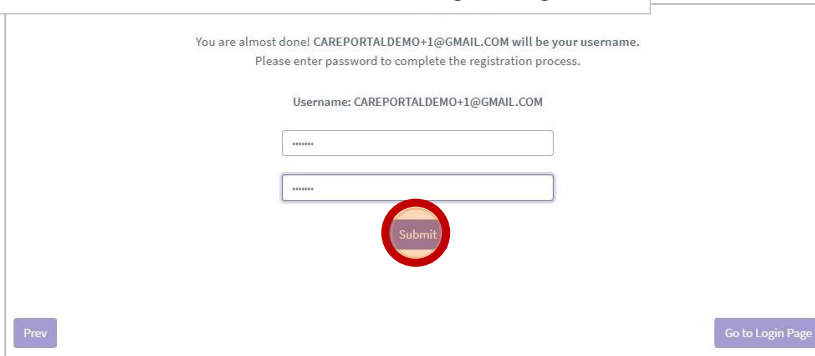
email id CAREPORTALDEMO+8@GMAIL.COM.
on code below.

Please click next to continue

Next

10

You will be prompted to create a password; enter a password for your CarePortal account. Click "Submit" and then "Go to Login Page".



You are almost done! CAREPORTALDEMO+1@GMAIL.COM will be your username.
Please enter password to complete the registration process.

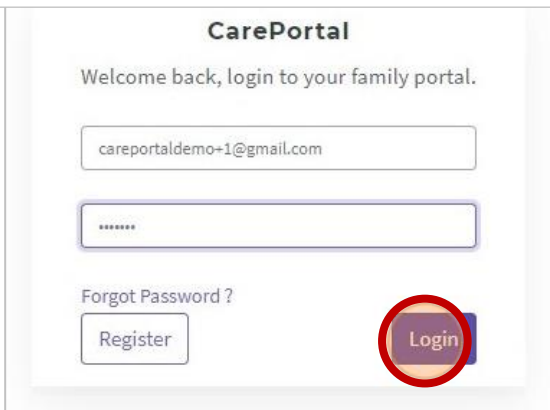
Username: CAREPORTALDEMO+1@GMAIL.COM

Submit

Prev Go to Login Page

11

Once you're back on the log in page, enter in your log in information and click "Login". Your username is the email you used to register and the password is the one you just created.



CarePortal

Welcome back, login to your family portal.

careportaldemo+1@gmail.com

Forgot Password ?

Register Login