



User Manual

Caregiver Deluxe — Windows Desktop App

The complete guide to setting up and using the desktop app

Version 1.7.13

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1. Welcome & Key Concepts

Caregiver Deluxe for Windows is a native desktop app for logging daily care, recording medications, and producing clear reports for the people you care for. It signs in to your existing Caregiver Deluxe account and keeps everything on your secure online Care Group, so the desktop app and the web app always show the same information.

Four things to understand

- **Your Care Group** is your account. It holds your care recipients, caregivers, medications, settings, and history. You identify it at sign-in with a short “family slug” (for example, *wear-family*).
- **Administrators vs. caregivers.** Administrators set up and manage the Care Group; caregivers record daily care. The same person can be both.
- **Care recipients** are the people receiving care. Daily entries, medications, and reports all belong to a care recipient.
- **Everything is online.** The app reads and saves to your Care Group on the server, so it needs an internet connection and the web app shows the same data.

Your very first login must be as the Administrator

When a Care Group is brand new, there are no caregiver accounts yet — so a caregiver cannot sign in with a PIN until an administrator creates their account. The very first thing you do is sign in as the administrator (using the credentials from your website signup) and complete first-time setup. The app guides you with a **Getting started** checklist on the Admin Console, shown until your Care Group has at least one care recipient and one caregiver.

2. Getting Started: Your First Login

Install and open

- **Requirements:** Windows 10 or Windows 11 and an internet connection.
- Run the installer, then launch **Caregiver Deluxe — Desktop** from the Start menu or desktop shortcut. The app remembers its window size and position.

Step 1 — Sign in as the administrator

On the sign-in screen, choose **Sign in as an administrator**, then enter your Care Group, admin username, and password (the credentials created when you signed up on the website).

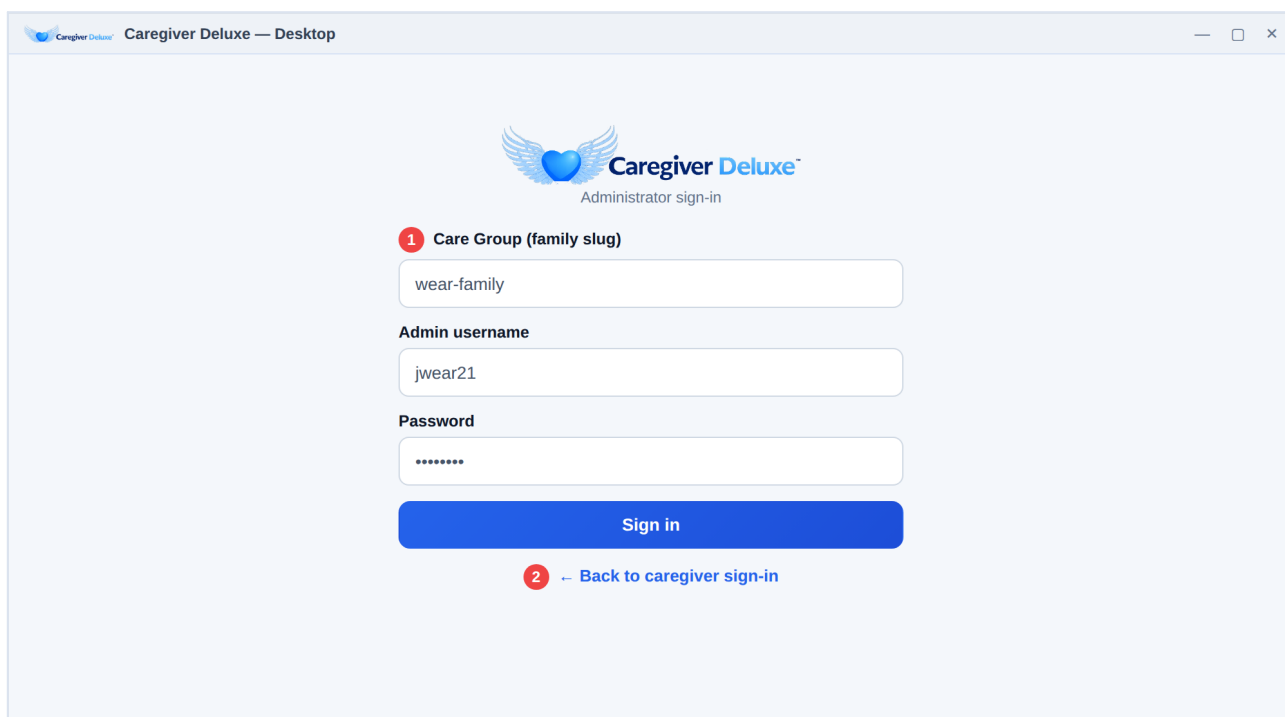
The screenshot shows the 'Caregiver Deluxe — Desktop' application window. At the top center is the logo, which consists of a blue heart with white wings, followed by the text 'Caregiver Deluxe' and 'Administrator sign-in' below it. Below the logo, there are three input fields. The first field is labeled '1 Care Group (family slug)' and contains the text 'wear-family'. The second field is labeled 'Admin username' and contains the text 'jwear21'. The third field is labeled 'Password' and contains a series of dots. Below these fields is a large blue button labeled 'Sign in'. At the bottom center, there is a red circle with the number '2' followed by a blue link that says '← Back to caregiver sign-in'.

Figure 2.1 — Administrator sign-in.

- 1 Enter your **Care Group** slug, **admin username**, and **password**.
- 2 Use **Back to caregiver sign-in** to return to the normal caregiver screen.

Step 2 — Follow the Getting started checklist

The Admin Console opens to a hub of tiles. Until your Care Group is set up, a green **Getting started** checklist appears at the top with the recommended order.

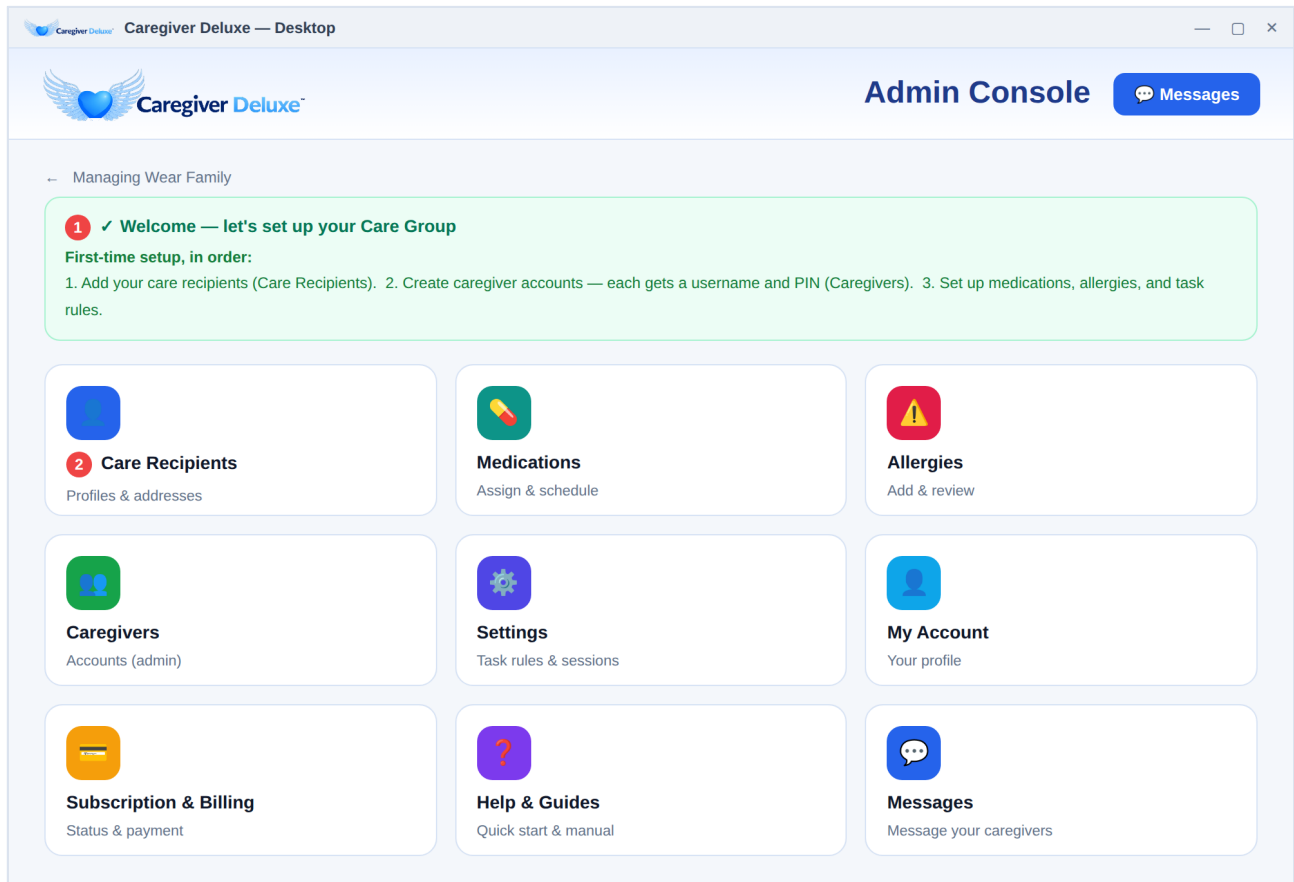


Figure 2.2 — The Admin Console with the first-time Getting started checklist.

- 1 The **Getting started** checklist — it disappears automatically once you have at least one care recipient and one caregiver.
- 2 Work left-to-right: open **Care Recipients** first, then **Caregivers**.
 - **Add care recipients** — open **Care Recipients** and add each person you care for.
 - **Create caregiver accounts** — open **Caregivers** and add each caregiver with a username and a 4–6 digit PIN. Write the PIN down; you'll give it to that caregiver.
 - **Set up the rest** — assign medications, record allergies, and choose your task rules.

Step 3 — Caregivers sign in

Once their accounts exist, caregivers sign in on the normal sign-in screen with the Care Group, their username, and their PIN.

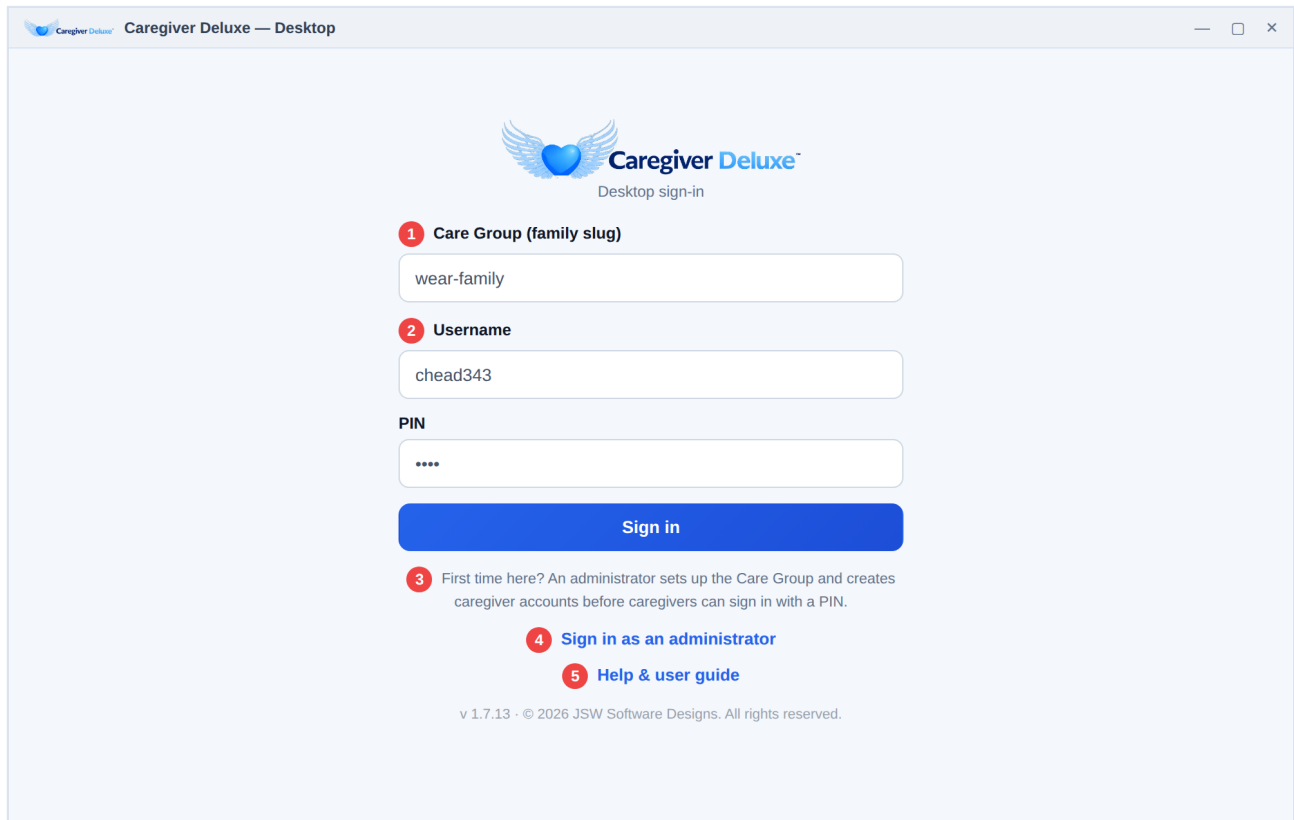


Figure 2.3 — The caregiver sign-in screen.

- 1 The **Care Group** slug for your account.
- 2 The caregiver's **username** and **PIN**.
- 3 A reminder that an administrator must set up accounts first.
- 4 **Sign in as an administrator** — the admin entry point.
- 5 **Help & user guide** — opens this manual and the Quick Start guide inside the app.

3. The Caregiver Journal (Daily Use)

This is the day-to-day heart of the app: signing in, choosing who you're caring for, and recording the day.

3.1 Choosing a care recipient

After signing in, you'll see your Care Group's care recipients. Select one to open its action menu.

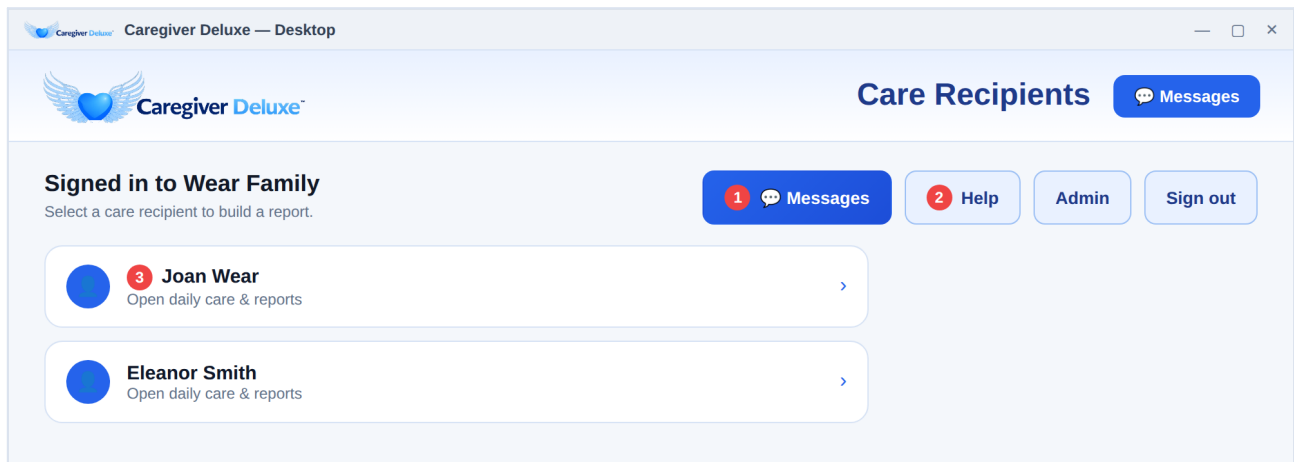


Figure 3.1 — Care recipients (home).

- 1 Help** — opens the guides anytime.
- 2 Admin** — enter the Admin Console (an admin sign-in is required).
- 3** Select a **care recipient** to continue.

3.2 The action menu

For the selected care recipient you can record care or run a report.

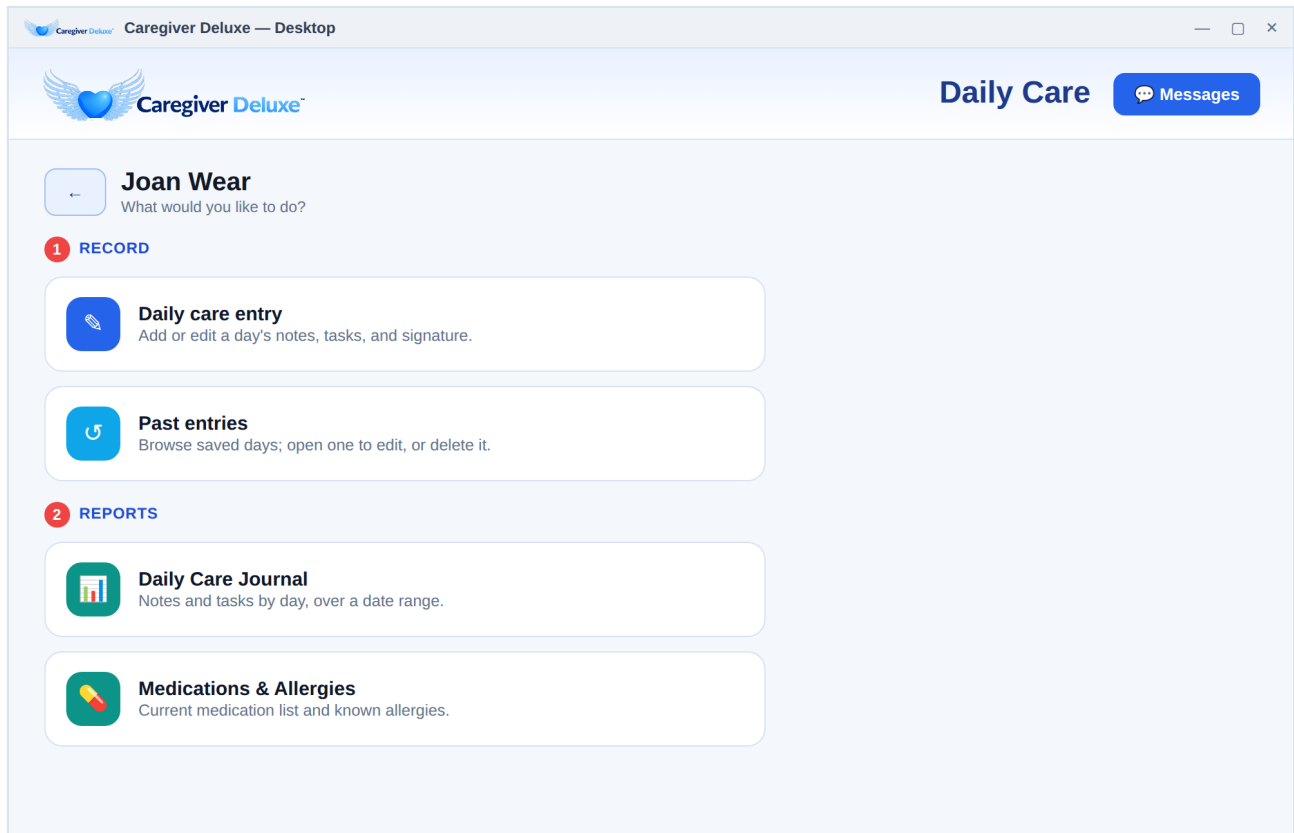


Figure 3.2 — What would you like to do?

- 1 Record** — Daily care entry (add/edit a day) or Past entries (browse saved days).
- 2 Reports** — Daily Care Journal, or Medications & Allergies.

3.3 The Daily Entry form

The daily entry captures one day of care. Fill in what happened during the shift, then save.

Caregiver Deluxe — Desktop

Caregiver Deluxe

Caregiver Journal Entry Messages

← Joan Wear

1 Date 06/29/2026 Caregiver Cynthia Head

2 Visit Details Shift start 09:00 AM Shift end 05:00 PM

3 Tasks

✓ Meals & snacks dictate

Ate a full breakfast; good appetite at lunch.

✓ Medications given dictate

4 Medication Log

Atorvastatin 40 mg — given 9:01 AM ✓ · Apixaban 2.5 mg — given 9:03 AM ✓

5 Save entry Delete entry

Figure 3.3 — The Daily Entry form.

- 1 **Date** and **Type of service** for the visit.
- 2 **Visit Details** — shift start and end times for your records. (Your EVV system still handles official clock-in/out for pay.)
- 3 **Tasks** — tick what was done, add details underneath, and tap **dictate** to speak your notes.
- 4 **Medication Log** — record which medications were given and when.
- 5 **Save Entry** when you're done (or **Clear Form** to start over).

3.4 Past entries

- Browse saved days and open one to review it.
- Whether you can edit an entry depends on your Care Group's **editing past entries** policy (set by an administrator): any entry, only your own, or none.
- Caregivers marked **Trusted** can edit any entry regardless of the policy.

4. The Administrator Console

The Admin Console (reached with an administrator sign-in) is where you manage everything about your Care Group. It opens to the hub of tiles shown in Figure 2.2.

4.1 Care Recipients

- Add or remove care recipients and edit each profile, including contact details and address.
- Address entry uses a smart lookup that can use your location to surface the right address faster.
- Removing a care recipient hides them from the list but keeps their history; you can re-add them later.

4.2 Medications

Assign medications to a care recipient using the built-in drug-library search.

The screenshot shows the 'Caregiver Deluxe — Desktop' interface. At the top, there's a header with the logo and a 'Medications' title. Below the header, there's a 'Care recipient' dropdown set to 'Joan Wear' and an 'Add medication' button. The main area is divided into two columns. The left column, 'Assigned medications', lists three items: Apixaban | 2.5 mg | Tablet Oral, Atorvastatin | 40 mg | Tablet Oral, and Digoxin | 0.125 mg | Tablet Oral. The right column, 'Add a medication', contains a search bar with 'simvastatin', a 'Search' button, and a dropdown showing 'Simvastatin 7 strengths · Tablet Oral'. Below this, there are fields for 'Strength / dose' (40 mg), 'Dose form / route' (Tablet Oral), and 'Times per day' (1). At the bottom, there are 'Assign to client' and 'Cancel' buttons.

Figure 4.1 — Assigning a medication.

- 1 Choose the care recipient, then **Add medication**.
- 2 Search by brand or generic name; pick the result. (If a drug isn't in your library yet, it's looked up live and added.)
- 3 Choose the **strength** and **dose form**, and set **times per day**.
- 4 **Assign to client**. The app prevents adding the same drug, strength, and form twice.

After assigning, select a medication in the list to fine-tune its exact dispense times, mark it **PRN** (as needed), add notes, or remove it.

4.3 Allergies

Record and review a care recipient's known allergies. They appear on the Medications & Allergies report.

4.4 Caregivers

Create and manage caregiver accounts.

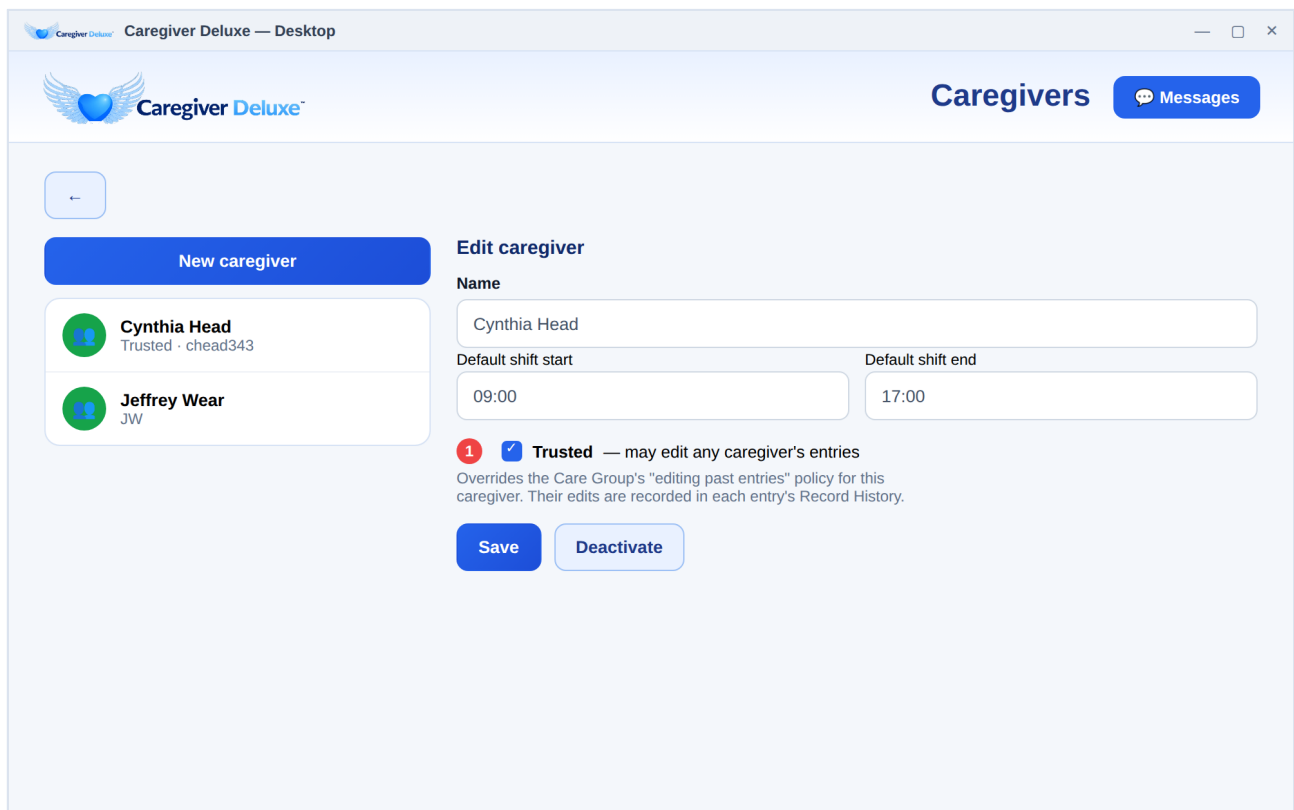
The screenshot shows the 'Caregiver Deluxe — Desktop' application window. The top navigation bar includes the 'Caregiver Deluxe' logo and a 'Messages' button. The main content area is titled 'Caregivers'. On the left, there is a 'New caregiver' button and a list of existing caregivers: 'Cynthia Head' (Trusted · chead343) and 'Jeffrey Wear' (JW). The 'Edit caregiver' form for Cynthia Head is displayed on the right. It includes fields for 'Name' (Cynthia Head), 'Default shift start' (09:00), and 'Default shift end' (17:00). Below these fields, there is a 'Trusted' checkbox which is checked, accompanied by a red '1' icon. A tooltip explains that this option allows the caregiver to edit any caregiver's entries, overriding the Care Group's policy. At the bottom of the form are 'Save' and 'Deactivate' buttons.

Figure 4.2 — Caregiver accounts, with the Trusted option.

1 Trusted — lets this caregiver edit *any* caregiver's entries, overriding the Care Group's editing policy (useful for a lead caregiver).

- Create an account with a username and a 4–6 digit PIN; set default shift start/end times that pre-fill that caregiver's daily entries.
- Deactivate a caregiver to remove their access. To reset a PIN, deactivate and re-add with the same username.

4.5 Settings

Three Care Group-wide settings live here.

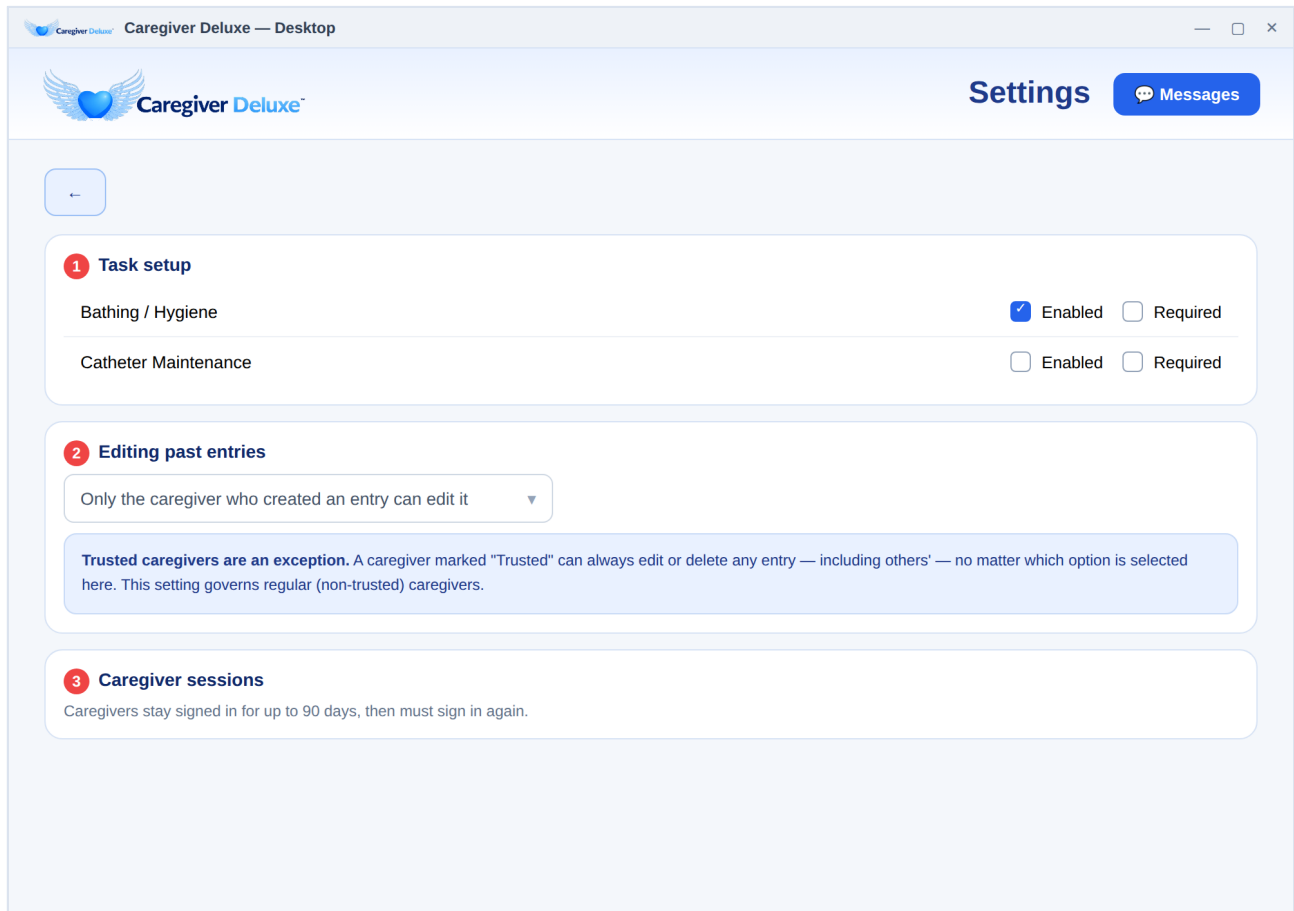


Figure 4.3 — Settings: task rules, editing policy, and session length.

- 1 Task setup** — choose which care tasks are enabled, which are required, and minimums where relevant.
- 2 Editing past entries** — set whether caregivers can edit any entry, only their own, or none.
- 3 Session length** — how long caregivers stay signed in before re-entering their PIN.

4.6 My Account

Review and update your administrator profile details.

5. Messages (Care-Team Messaging)

Caregiver Deluxe includes private team messaging so your whole care team can stay in sync without sharing personal phone numbers. Messages live inside your Care Group and are shared with the web app, so you can send from the desktop and read on the web (or the reverse).

5.1 Opening Messages

Click the **Messages** button in the app header — it's available from every screen once you're signed in. A red badge shows how many conversations have unread messages and refreshes automatically. Administrators also have a **Messages** tile on the Admin Console.

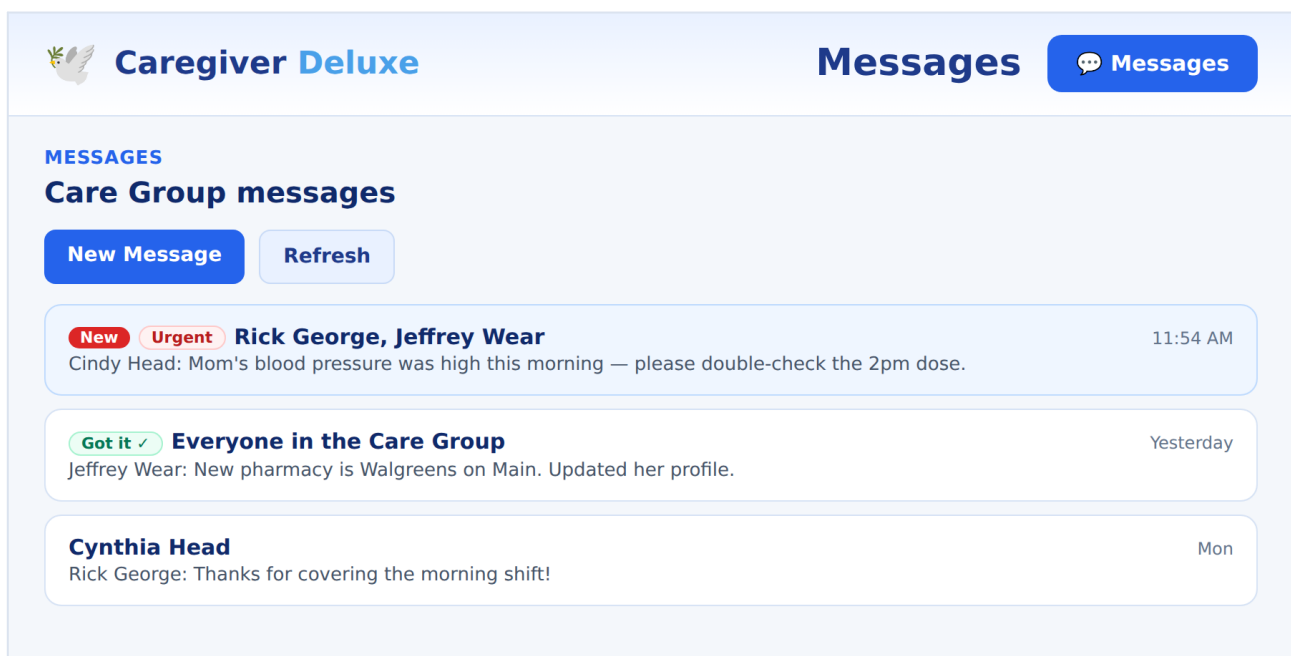


Figure 5.1 — The Messages window: inbox, with the compose and conversation views.

- 1 **Inbox** — your conversations, with unread and urgent ones first; each row shows a preview and **New** / **Urgent** tags.
 - 2 **New Message** — choose one person, several, or **Everyone in the Care Group**; tick **Mark urgent** if needed; then **Send**.
 - 3 **Reply** in a thread, or tap **Got it ✓** to acknowledge — everyone can see who has acknowledged.
- Admins are included as members, so caregivers and admins can message each other freely.
 - Use the **Urgent** flag sparingly — for things that can't wait (a fall, a medication change, a no-show) — so it stands out in the inbox.

6. Record History & Accountability

Every saved entry keeps a **Record History** — a clear trail of who created the entry and who later changed it, with a short summary of what changed. This protects everyone: the caregiver who wrote an entry can see if a lead caregiver later corrected it, and families and auditors get a transparent record.

6.1 What gets recorded

- **Created by** — the caregiver who first saved the entry, with the date and time.
- **Edited by** — each later edit, with who made it, when, and a summary of what changed (for example, “Updated journal notes, medications, and visit details”).

6.2 Where you'll see it

- **On each saved entry** — a Record history panel appears on Past Entries cards and when you open an entry to edit it.
- **In reports** — the Daily Care Journal export includes a “Record history” block under each entry, so the trail travels with any printed or saved report.

6.3 How it works with Trusted caregivers

When a **Trusted** caregiver (or an admin) edits an entry created by someone else, the edit is captured in that entry's Record History. So if one caregiver writes an entry and a Trusted lead caregiver later corrects it, the record clearly shows who created it and who edited it — and what changed. This is the accountability backbone behind the “Editing past entries” policy in Chapter 4.

Note: entries created before this feature have no recorded original author, so their Record History shows a “Created by” baseline only. Every change going forward is fully tracked.

7. Reports

From a care recipient's action menu (Figure 3.2), choose a report:

- **Daily Care Journal** — notes and tasks by day across a date range you choose.
- **Medications & Allergies** — the current medication list and known allergies for the care recipient.

Reports can be saved and shared as a PDF for family members or care providers.

8. Billing & Your Subscription

Open **Subscription & Billing** from the Admin Console to see where your Care Group stands and to manage payment.

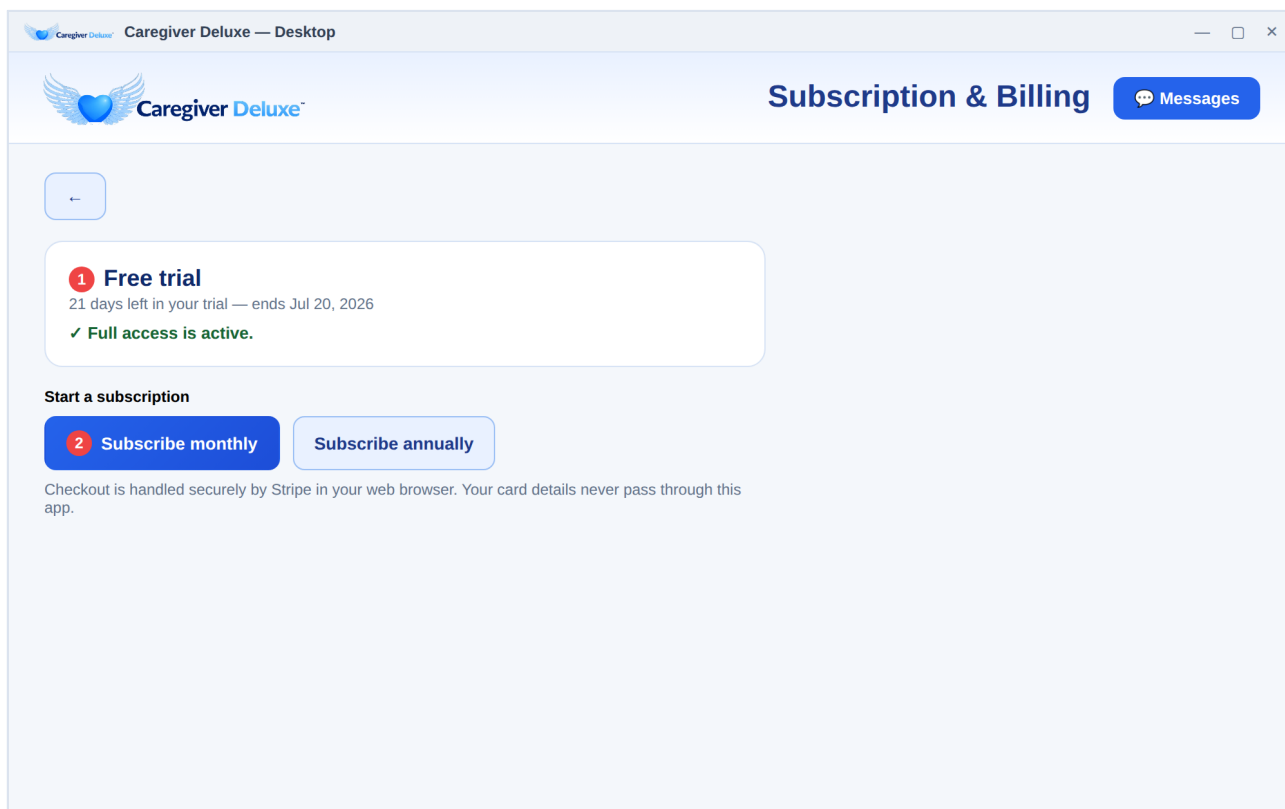


Figure 6.1 — Subscription & Billing (free-trial example).

- 1 Your current status — free trial (with days remaining), active (with renewal date), past due, canceled, or none — and whether full access is on.
 - 2 Existing subscribers see **Manage billing** (opens the Stripe portal); new ones see **Subscribe monthly/annually** (opens Stripe Checkout).
- Payments are always handled on Stripe's secure pages in your web browser — your card details never pass through the app.
 - During a free trial, the Admin Console shows the days remaining. If a subscription lapses, access is paused until billing is resolved.
 - You can also manage billing from the **Account portal** on the Caregiver Deluxe website without opening the app.

9. Help & Troubleshooting

Opening the guides

Choose **Help** (on the sign-in screen, the care recipients screen, or the Admin Console). The Help window shows the first-time setup steps and lets you open this User Manual or the Quick Start Guide inside the app.

Common questions

- **A caregiver can't sign in.** Confirm an administrator has created their account, and double-check the Care Group, username, and PIN. After several failed attempts, wait a few minutes and try again.
- **"Couldn't reach the server."** Check your internet connection; the app needs to be online to read and save data.
- **A medication isn't listed.** In Admin > Medications, search its name; if it's new it's looked up live and added.
- **Forgot the administrator password.** Use "Forgot password" on the website to reset it.
- **A caregiver forgot their PIN.** An administrator deactivates and re-adds them with the same username to set a new PIN.

10. Quick Reference & Glossary

- **Care Group** — your whole account: recipients, caregivers, settings, history. Identified by a family slug.
- **Family slug** — the short text that identifies your Care Group at sign-in (e.g. *wear-family*).
- **Administrator** — manages the Care Group (recipients, caregivers, medications, settings, billing).
- **Caregiver** — signs in with a PIN to record daily care.
- **Care recipient** — a person receiving care; owns entries, medications, and reports.
- **Daily entry** — one day's record of tasks, medications, observations, and an optional signature.
- **PRN** — a medication taken “as needed” rather than on a fixed schedule.
- **Trusted caregiver** — may edit any caregiver's entries, overriding the editing policy.
- **Editing past entries policy** — controls who can change saved entries: any, own only, or none.

Need more help? Use the Help option in the app or contact Caregiver Deluxe support through the website. This manual describes Caregiver Deluxe — Desktop version 1.7.13.