



Quick Start Guide

Caregiver Deluxe — Web App

Version 3.13

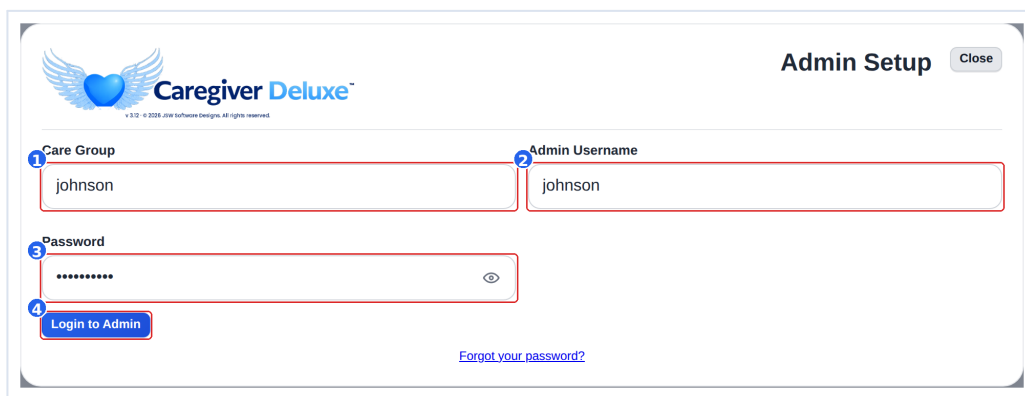
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Caregiver Deluxe is a shared workspace for your **Care Group** — your private space holding your care recipients, caregivers, medications, daily entries, and messages. It runs in any browser at **caregiverdeluxe.net/app** (and as a native Windows desktop app that shares the same account).

Two logins, on purpose: the **Administrator** signs in with a **password** (via Admin Setup); **caregivers** sign in with a short **PIN**. Password = admin, PIN = caregiver.

1. Sign in as the Administrator (first)

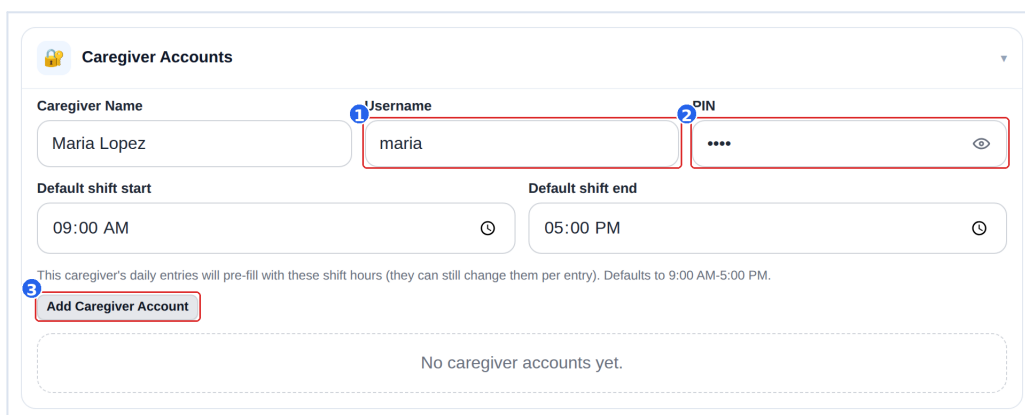
Go to **caregiverdeluxe.net/app** → click **Admin Setup** → enter your Care Group ID, admin username, and password from your welcome email → **Login to Admin**.

The screenshot shows the 'Admin Setup' window of Caregiver Deluxe. It has a title bar with the logo and a 'Close' button. The form contains four numbered steps: 1. 'Care Group' with the value 'johnson'; 2. 'Admin Username' with the value 'johnson'; 3. 'Password' with masked characters '*****' and an eye icon; 4. A 'Login to Admin' button. A 'Forgot your password?' link is at the bottom.

The Admin Setup sign-in panel.

2. Add care recipients & caregivers

- Open **Manage Clients**, add a name, then fill in the **Client Profile**.
- Open **Caregiver Accounts** and add each caregiver (name, username, 4–6 digit PIN). Mark a lead caregiver **Trusted** to let them correct anyone's entries. Write the PIN down.

The screenshot shows the 'Caregiver Accounts' panel. It has a title bar with a lock icon and a dropdown arrow. The form includes: 'Caregiver Name' (Maria Lopez); 'Username' (1) (maria); 'PIN' (2) (**** with an eye icon); 'Default shift start' (09:00 AM with a clock icon); and 'Default shift end' (05:00 PM with a clock icon). A note states: 'This caregiver's daily entries will pre-fill with these shift hours (they can still change them per entry). Defaults to 9:00 AM-5:00 PM.' Below is a red 'Add Caregiver Account' button (3) and a dashed box containing the text 'No caregiver accounts yet.'

Creating a caregiver login.

3. Assign medications

Open **Current Client Medication Management**, select the recipient, search the catalog, pick strength/form and times per day, and **Add Medication to Current Client**.

4. Daily use (caregivers)

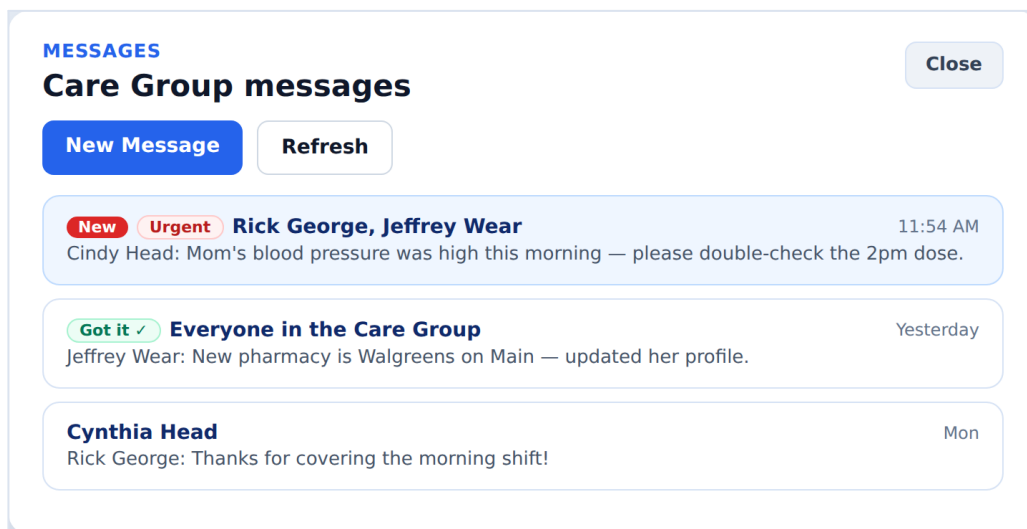
- Sign in with Care Group + username + **PIN**.
- Pick the care recipient for your shift.
- Fill in the **Daily Entry Form**: Visit Details, Medication Log, Task Timeline, Daily Observations, Journal Note, and **Signature**.
- Tap **Save Entry** — nothing is stored until you do.

The screenshot shows the 'Daily Entry Form' with a 'Visit Details' section expanded. The form includes fields for 'Client Name' (a dropdown menu showing 'Select Client'), 'Date' (a date picker showing '06/28/2026'), and 'Caregiver Name'. The 'Visit Details' section contains a red location pin icon, a text area for 'Shift times and service location, for your records (optional). Your EVV system handles official clock-in/out for pay.', a 'Type of service' dropdown menu showing 'Select service', and a note 'The EVV service category for this visit.' At the bottom, there are time pickers for 'Shift start (time in)' (9:00 AM) and 'Shift end (time out)' (5:00 PM), each with a 'Now' button.

The Daily Entry Form (Visit Details).

5. Messages

Click **Messages** in the header (a red badge shows unread count). **New Message** → one person, several, or **Everyone in the Care Group** → optional **Mark urgent** → **Send**. Open a thread to **reply** or tap **Got it ✓**. The inbox is shared with the desktop app.



Care-team messaging: inbox, compose, and acknowledgements.

6. Record History

Every saved entry shows **who created it and who later edited it**, with what changed — on the entry and in reports. When a **Trusted** caregiver corrects another caregiver's entry, it's recorded automatically, giving a clear, accountable trail.

7. Reports

Open **Journal Reports** → choose a report type → pick the client and date range → **Preview / Save PDF / Download / Email**. The **Medication List** button prints a clean current med list (with allergies) for the doctor. Reports include each entry's Record History.

Need help?

- “Invalid username or PIN” right after signing up? Use **Admin Setup** (password), not the caregiver PIN screen.
- **Forgot admin password?** *Forgot your password?* on the Admin Setup panel.
- **Caregiver forgot PIN?** Reset it in **Caregiver Accounts**.
- **No medications to log?** The admin must assign them first.

Reply to your welcome email and we'll help you get set up. · caregiverdeluxe.net