



# User Manual

Caregiver Deluxe — Web App

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The complete guide to setting up and using Caregiver Deluxe

Version 3.13

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# 1. Welcome & Key Concepts

Welcome to Caregiver Deluxe, the simple, shared workspace that helps families and care teams track medications, log daily care, message each other, and produce clear reports for one or more care recipients. This manual explains every screen and feature, step by step.

## The four things to understand

- **Care Group.** Your private workspace. Everything — care recipients, caregivers, medications, daily entries, and messages — lives inside it. Each has a short **Care Group ID** (e.g. *johnson*) used to sign in.
- **Administrator.** The account created at sign-up. Sets up care recipients, caregivers, medications, and billing. Signs in with a **username and password**.
- **Caregiver.** Provides day-to-day care. Signs in with a **username and a short PIN**.
- **Care recipient (client).** The person being cared for; you can have more than one.

### Two logins, on purpose

The **Administrator** signs in through “Admin Setup” with a **password**. **Caregivers** sign in on the main “Welcome back” screen with a **PIN**. Remember it simply: **password = admin, PIN = caregiver**.

### Your very first login must be as the Administrator

A new Care Group has no caregivers yet, so start with **Admin Setup**, create your care recipients and caregiver accounts, then caregivers can sign in.

## Where to find things

Caregiver Deluxe runs in any browser at **caregiverdeluxe.net/app** — nothing to install. The **Downloads** page at [caregiverdeluxe.net](https://caregiverdeluxe.net) has this manual and the Quick-Start Guide, and is where the native **Windows desktop app** appears. The desktop app shares the same Care Group and sign-in, so everything stays in sync.

## 2. Getting Started: Your First Login

### Step 1 — Open the app and choose the right door

Go to **caregiverdeluxe.net/app**. You'll see the caregiver “Welcome back” screen. Because you don't have caregivers yet, click the grey **Admin Setup** button beneath the blue Log In button.

  
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### Welcome back

Sign in to your Care Group workspace

**2** Care Group

Caregiver Username

**3** PIN

**1** Log In

Admin Setup

Use your Care Group, caregiver username, and PIN to access the shared family workspace.

new to Caregiver Deluxe?

[Create a Care Group & start a free trial →](#)

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Figure 2.1 — The caregiver sign-in screen. New owners start with Admin Setup.

## Step 2 — Sign in as the Administrator

In the Admin Setup panel, enter the details from your welcome email and click **Login to Admin**.

The screenshot shows the 'Admin Setup' panel. At the top left is the 'Caregiver Deluxe' logo with the version 'v3.12 © 2025 JMW Software Designs. All rights reserved.' below it. The title bar on the right says 'Admin Setup' with a 'Close' button. The form has three numbered input fields: 1. 'Care Group' containing 'johnson'. 2. 'Admin Username' containing 'johnson'. 3. 'Password' containing masked characters and an eye icon. Below the password field is a 'Login to Admin' button. At the bottom right is a link that says 'Forgot your password?'.

Figure 2.2 — The Admin Setup sign-in panel.

### Where do these come from?

Your **Care Group ID**, **admin username**, and the fact that you chose a **password** at sign-up are all in your welcome email. The password itself is never emailed — it's the one you typed when you created the account.

## Step 3 — First-run sequence

- Open **Manage Clients** and add your care recipient(s).
- Open **Caregiver Accounts** and create a login (username + PIN) for each caregiver; mark a lead caregiver **Trusted** if they should correct anyone's entries.
- Open **Current Client Medication Management** and assign each care recipient's medications.
- Hand each caregiver their username and PIN.

## 3. The Administrator Dashboard

The Admin Dashboard is where you configure everything about your Care Group. Open it from **Admin Setup** and signing in with your admin password. Each section below is one collapsible card.

### 3.1 Admin Account & Login

Your contact details and sign-in password live here. Your email is where account and password-reset messages are sent; your login username is fixed when the Care Group is created.

 **Admin Account & Login**

Your own contact details and sign-in password. Your email is also where account & password-reset messages are sent. Your login username is set when the Care Group is created and can't be changed here.

**Contact name**

**Login username (read-only)**

**Email**

you@example.com

**Phone**

(615) 555-0123

**Find address**

Start typing your address...

Pick a match to fill the fields below, or type them in manually.

**Street address**

**City**

**State**

**ZIP**

Save Account Details

**Change password**

Enter your current password, then choose a new one (at least 8 characters).

**Current password**

**New password**

**Confirm new password**

1 Change Password

Figure 3.1 — Admin account details and the Change Password area.

### 3.2 Manage Clients

A “client” is a care recipient. Add and remove them here.

**Manage Clients**

Add a new client (care recipient) or remove one. **Removing a client hides them from the client list but keeps all of their existing journal entries and history intact (a soft delete).** The client can be re-added later with the same name to restore them.

1 **New Client Name**

Eleanor Johnson

2 **Add Client**

**Save All Settings** Saves Session Policy, Task Rules & Client Profile in one tap. Add/Delete buttons act on their own items.

No clients yet. Add one above.

Figure 3.2 — Adding a care recipient.

### Removing a client is safe

Removing a client hides them but keeps all of their journal entries and history intact (a “soft delete”). Re-add the same name later to restore them.

## 3.3 Client Profile

With a care recipient selected, the Client Profile card holds their full details — identity, contacts, doctor, pharmacy, address, emergency contact, and care notes. Click **Save Client Profile**.

Client Profile

First Name

Eleanor

Last Name

Johnson

Preferred Name

Ellie

Date of Birth

mm/dd/yyyy

Doctor

Dr. Patel

Pharmacy

Walgreens #214

Address Lookup

Start typing an address to search...

Street Address

42 Maple Street

Apt / Unit (optional)

Apt, suite, unit

City

Knoxville

State

TN

ZIP

37902

Emergency Contact

Robert Johnson

Emergency Phone

(555) 987-6543

Medical Conditions

Diagnoses, conditions

Care Instructions

General care instructions

Mobility Notes

Diet Notes

Bathroom / Incontinence Notes

Dementia / Memory Notes

Fall Risk Notes

Save All Settings

Saves Session Policy, Task Rules & Client Profile in one tap. Add/Delete buttons act on their own items.

1

Save Client Profile

Figure 3.3 — The Client Profile, with contact, medical, and care-note fields.

## 3.4 Caregiver Session Policy

Controls how long a caregiver stays signed in before re-entering their PIN. Choose a shorter period for shared devices, then **Save Session Policy**.

**Caregiver Session Policy**

1 Maximum Caregiver Stay Logged In 90 Days

Indefinite Allowed No

Save Session Policy

Figure 3.4 — Choosing how long caregiver sessions last.

### 3.5 Caregiver Accounts

Create a login for each caregiver — name, username, and a 4–6 digit PIN, with optional default shift times. Mark a lead caregiver **Trusted** to let them edit anyone's entries (see Chapter 6).

**Caregiver Accounts**

Caregiver Name Maria Lopez

1 Username maria

2 PIN \*\*\*\*

Default shift start 09:00 AM

Default shift end 05:00 PM

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.

3 Add Caregiver Account

No caregiver accounts yet.

Figure 3.5 — Creating a caregiver login.

#### Write the PIN down

The PIN is how a caregiver signs in. Note it somewhere safe; you can reset it here any time.

### 3.6 Current Client Medication Management

Assign the selected care recipient's medications from the built-in drug catalog so they appear in the caregiver's Medication Log and on reports.

**Current Client Medication Management**

Search and add medications for the currently selected client. Manage only the client's active assigned medications in this section.

**1** Medication Name  
Lisinopril

Not finding it in the catalog? [Add it as a custom medication](#)

Strength / Dose:  Dose Form / Route:  Times Per Day: 1 time per day

Dispersed Time 1:

**2** Add Medication

Client's Currently Prescribed Medications

Print / Export Medication List

Save All Settings Saves Session Policy, Task Rules & Client Profile in one tap. Add/Delete buttons act on their own items.

Figure 3.6 — Assigning a medication to the current client.

### 3.7 Client Medication Allergies

Record allergies so the team has the safety context that matters; allergies also feed the interaction warnings caregivers see.

**Client Medication Allergies**

Admin-only allergy management for the currently selected client.

Allergy Type: Medication Allergen Name: Search medication allergy name Severity: Moderate

Reaction / Notes: Rash, swelling, anaphylaxis, GI upset, etc.

**1** Add Allergy

Select a current client to manage allergies.

Figure 3.7 — Recording an allergy.

### 3.8 Daily Task Rules

Decide which care tasks caregivers can log; enable standard tasks, add custom ones, and **Save Task Rules**.

**• Daily Task Rules**

Choose which task types appear for caregivers, which are required, how many times per day they are required, and whether task-specific notes are required. You can also add custom task types for this care group.

**Filter by Category** **Add Custom Task** **Custom Task Category**

All Categories Example: Catheter Care

Add Custom Task **1 Save Task Rules**

Figure 3.8 — Choosing which tasks appear on the daily timeline.

### 3.9 Editing Past Entries (history policy)

Choose who may change or delete saved entries: **any caregiver**, **only the original author**, or **admins only**.

#### Trusted caregivers are an exception

A caregiver marked **Trusted** can always edit or delete any entry — including others' — no matter which option is selected. This policy governs *regular (non-trusted)* caregivers, and every such edit is captured in the entry's Record History (Chapter 6).

### 3.10 Data Management

Export a backup of your Care Group's data, or import a previous export. Use Export before major changes.

**Data Management**

Export a backup of all journal entries, or import a previously exported file.

**1 Export Data** Import Data

**Save All Settings** Saves Session Policy, Task Rules & Client Profile in one tap. Add/Delete buttons act on their own items.

Figure 3.9 — Exporting and importing your data.

## 4. The Caregiver Journal (Daily Use)

### 4.1 Signing in as a caregiver

Open **caregiverdeluxe.net/app**. On “Welcome back”, enter the Care Group, your caregiver username, and PIN, then tap **Log In**.

### 4.2 Choosing a care recipient

If the Care Group has more than one care recipient, pick who you're working with for this shift. Switch later with **Change Client**.

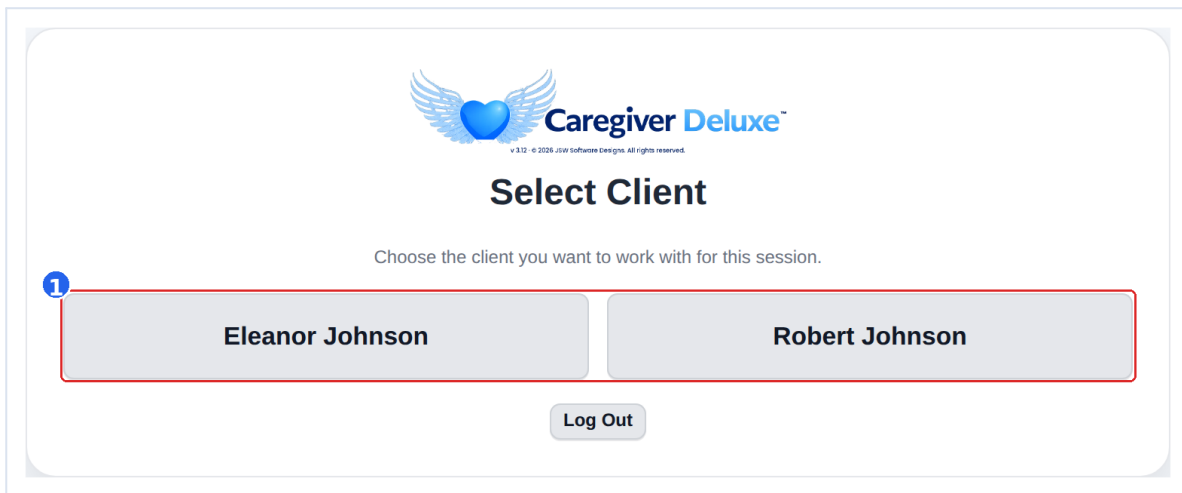


Figure 4.1 — Selecting the care recipient for your shift.

### 4.3 The app toolbar

Across the top you'll find **Change Client**, **Messages** (with an unread badge — see Chapter 5), **My Account**, **Admin Setup**, and **Log Out**.



Figure 4.2 — The caregiver toolbar.

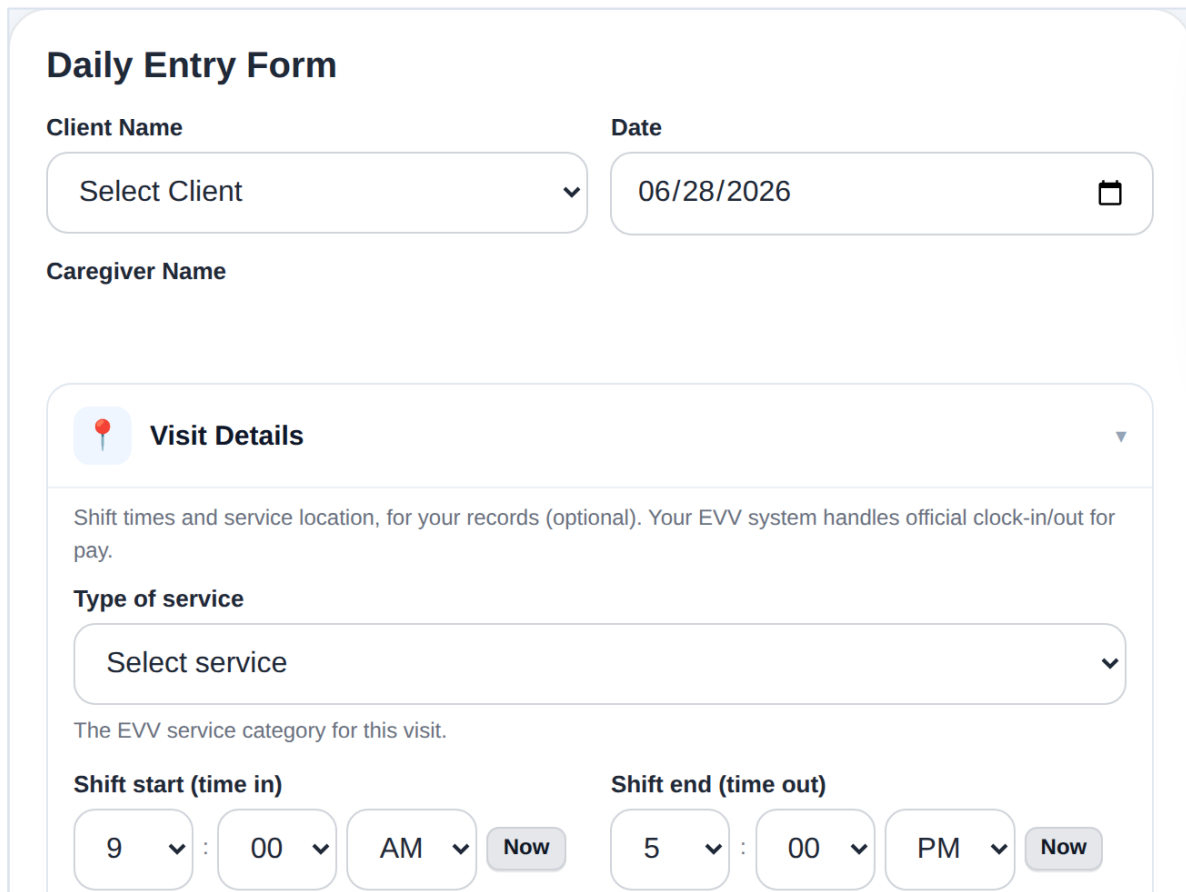
### 4.4 The Daily Entry Form

The heart of Caregiver Deluxe — one screen of expandable sections for everything about a shift.

#### Save before you leave

Your work isn't stored until you tap **Save Entry**. Tap **Clear Form** only to discard and start over.

**Visit Details** records who, when, and where, capturing the EVV data elements.



The screenshot displays 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 box 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.' Below this, there are two time selection sections: 'Shift start (time in)' and 'Shift end (time out)'. Each section has input boxes for hours (9 and 5 respectively), minutes (00 and 00 respectively), and a period (AM and PM respectively), followed by a 'Now' button.

**Daily Entry Form**

**Client Name**

Select Client ▼

**Date**

06/28/2026 📅

**Caregiver Name**

**Visit Details** ▼

Shift times and service location, for your records (optional). Your EVV system handles official clock-in/out for pay.

**Type of service**

Select service ▼

The EVV service category for this visit.

**Shift start (time in)**

9 : 00 AM **Now**

**Shift end (time out)**

5 : 00 PM **Now**

Figure 4.3 — Visit Details, including shift times and service location.

The **Medication Log**, **Interaction Warnings**, and **Task Timeline** record what was given and done.

Location of service (address)

Auto-fills from the client's home address, or type a different address where car

Defaults to the client's home address. You can edit it to a different service address, and/or capture GPS coordinates below.

Capture GPS location


Medication Log

Dispensed times are controlled in Admin. Caregiver enters only the actual given/administered times for the current day.

No medications available for this client yet. Assign them in Admin Setup.


Medication Interaction Warnings

Known interaction warnings for the medications currently assigned to this client.

Select a client to review medication interactions.


Daily Task Timeline

None done

Figure 4.4 — Medication Log, Interaction Warnings, and the Task Timeline.

**Daily Observations**, the free-text **Journal Note**, and your **Digital Signature** finish the entry. Tap **Save Entry** — saved shifts appear in the Saved Entries list, each showing its Record History (Chapter 6).

Add Timeline item

Log the day's care tasks: showers, meals, toileting, transport, etc.

Save Entry

Clear Form

Journal Reports

Medication List

Completed

Action

--:-- --

Bathroc

Task details

☐

Delete

Open

Daily Observations

Optional quick check-ins. Leave as "Not noted" if it doesn't apply.

Mood / behavior

Not noted

Optional note

Appetite / meals

Not noted

Optional note

Fluid intake / hydration

Not noted

Optional note (e.g. approx. oz)

Sleep / rest

Not noted

Optional note

Bowel / bladder

Not noted

Optional note

Journal Note

Open Journal Notes / Events of the Day

Describe events, observations, mood, behavior, incidents, concerns, and anything important that happened during the day.

Digital Signature

I certify services were provided as documented.

Sign to complete and certify this entry.

Clear Signature

Figure 4.5 — Observations, Journal Note, and the Digital Signature.

## 4.5 Your account & changing your PIN

Tap **My Account** to update your details or change your PIN (enter current PIN, then a new 4–10 digit PIN).

MY ACCOUNT

Your details & sign-in PIN

Close

Personal information

Update your contact details. Your username is set by your Care Group Admin and can't be changed here.

Name

Maria Lopez

Username (read-only)

Email

maria@example.com

Phone

(555) 123-4567

Find address

Start typing your address...

Pick a match to fill the fields below, or type them in manually.

Street address

City

State

ZIP

Save Details

Change PIN

Your PIN is how you sign in. Enter your current PIN, then choose a new one (4-10 digits).

Current PIN

1

New PIN

Confirm new PIN

Change PIN

Figure 4.6 — A caregiver's own account and PIN settings.

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## 5. Messages (Care-Team Messaging)

Caregiver Deluxe includes private team messaging so your care team can stay in sync without sharing personal phone numbers. Messages live inside your Care Group and are shared with the Windows desktop app — send from one, read on the other.

Click the **Messages** button in the app header. A red badge shows how many conversations have unread messages and refreshes automatically.

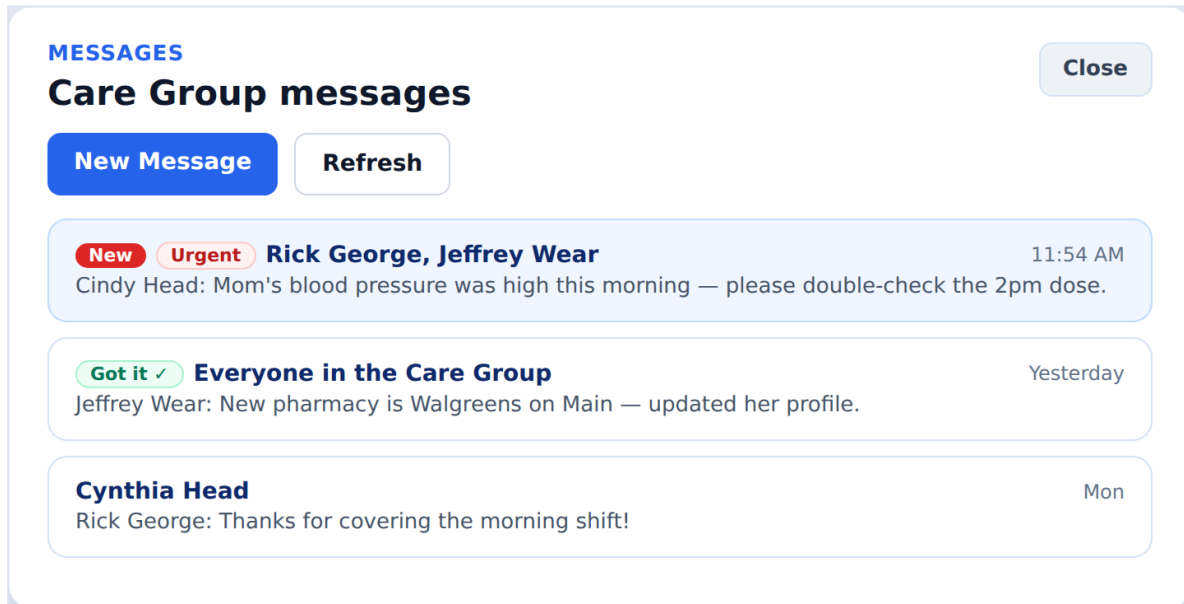


Figure 5.1 — The Messages window: inbox with New, Urgent, and acknowledgement tags.

- 1 **New Message** — choose one person, several, or **Everyone in the Care Group**; tick **Mark urgent** if needed; then **Send**.
  - 2 **Inbox** — unread and urgent conversations float to the top, each with a preview and tags.
  - 3 Open a thread to **reply**, or click **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 — so it stands out.

## 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 and gives families and auditors a transparent record.

### 6.1 What gets recorded

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

### 6.2 Where you'll see it

- **On each saved entry** — on the entry card and when you open it to edit.
- **In reports** — the Daily Care Journal and Client Notes reports include a “Record history” block under each entry, so the trail travels with any printed or emailed report.

### 6.3 How it works with Trusted caregivers

When a **Trusted** caregiver or 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.

#### A note on older entries

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

Caregiver Deluxe turns your daily entries into clean, shareable reports — for doctor visits, family updates, or Medicaid/EVV audits. Open them with **Journal Reports** on the entry form or the report button in the toolbar.

**JOURNAL REPORTS**  
Preview, Print, Save PDF, or Download Close

1 **Report type**  
Daily Care Journal

**Client**  
[Dropdown]

**Range**  
This Week

Choose a client and date range for the journal report.

2 Preview / Print / Save PDF Download PDF Download HTML Medication Administration Record

**Email report (PDF) to**  
recipient@example.com 3 Email PDF Sent from reports@caregiverdeluxe.net · do not reply

Figure 7.1 — The report builder.

- **Report type:** Daily Care Journal, Client Notes & Observations, Caregiver Activity, or Missed / Unrecorded Medications.
- **Client & range:** pick the care recipient and a range — This Week, This Month, This Year, custom, or All Entries.
- **Output:** Preview / Print / Save PDF, Download PDF or HTML, or email the PDF. The Daily Care Journal and Client Notes reports include each entry's Record History.

A dedicated **Medication Administration Record** documents medications given over a period, and the **Medication List** button produces a clean, current list (with allergies) for the doctor's office.

ACTIVE MEDICATION LIST

Current client medications

Close

PrintDownload PDF

Email this list (PDF) to

recipient@example.com

Email PDF

Figure 7.2 — The printable / emailable Medication List.

## 8. Billing & Your Subscription

Caregiver Deluxe is a subscription with a 30-day free trial. You provide a payment method when you create your Care Group, but you aren't charged until the trial ends, and you can cancel any time before then at no cost.

**GET STARTED** Close

### Create your Care Group

Start a 30-day free trial. You'll be the Care Group administrator, you can add caregivers and clients once you're in.

**Care Group name**

**Your name**

**Email**

**Admin username**

**Password**  👁

Choose a plan (your card isn't charged during the 30-day trial)

**Monthly**

**\$5.99**/mo

Billed monthly

**Annual**

**\$59.99**/yr

Two months free

Save ~17%

[Create account & continue](#)

Figure 8.1 — Creating a Care Group and starting the free trial.

- **Family Monthly** and **Family Annual** both include unlimited caregivers, medication management, daily journaling, messaging, reports, and allergy/interaction checks.
- The annual plan includes two months free versus paying monthly.

If your trial or subscription needs attention, the app shows a subscription screen to subscribe or manage billing. During a trial it shows how many days remain.

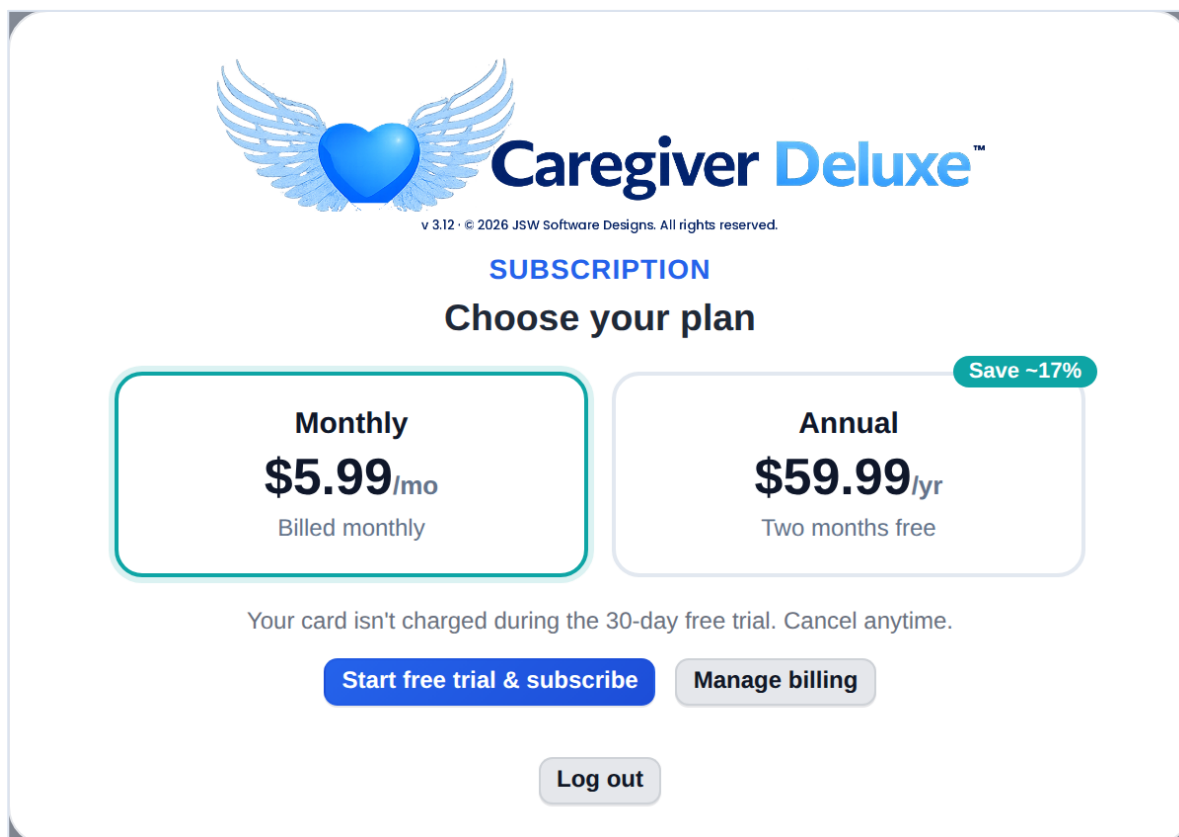


Figure 8.2 — The subscription / billing screen.

## 9. Account Recovery & Troubleshooting

- **“Invalid caregiver username or PIN” right after sign-up.** Use **Admin Setup** (password), not the caregiver PIN screen, then create caregivers.
- **Forgot the administrator password.** Click **Forgot your password?** on the Admin Setup panel.
- **A caregiver forgot their PIN.** Reset it in **Caregiver Accounts**.
- **A caregiver can't see medications to log.** The admin must assign them first.
- **A caregiver can't edit another's entry.** That's the editing policy — change it, or mark the caregiver **Trusted**.
- **The Messages badge isn't updating.** It refreshes every 30 seconds and when you open/act on a conversation.
- **Email didn't arrive.** Check spam; add the no-reply caregiverdeluxe.net address to your contacts.

## 10. Quick Reference & Glossary

### At a glance

- **App address:** caregiverdeluxe.net/app
- **Admin sign-in:** Admin Setup → Care Group ID + admin username + **password**.
- **Caregiver sign-in:** “Welcome back” → Care Group + caregiver username + **PIN**.
- **First-run order:** add care recipients → create caregivers → assign medications.
- **Messages:** header Messages button → inbox, New Message (one/some/all), urgent, replies, “Got it”.
- **Record History:** every entry shows who created and edited it; included in reports.

### Glossary

- **Care Group / Care Group ID** — your private workspace and its short sign-in identifier.
- **Administrator** — owner account (password) that sets up and manages the Care Group.
- **Caregiver** — day-to-day provider with a username and PIN.
- **Trusted caregiver** — may edit/delete any entry, overriding the history policy.
- **Care recipient / client** — the person being cared for.
- **Record History** — the per-entry trail of who created and edited it, and what changed.
- **EVV** — Electronic Visit Verification; visit data captured for Medicaid programs.
- **MAR** — Medication Administration Record.

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