User Manual

Caregiver Deluxe — Web App

The complete guide to setting up and using Caregiver Deluxe

Version 3.13

Contents

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 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.

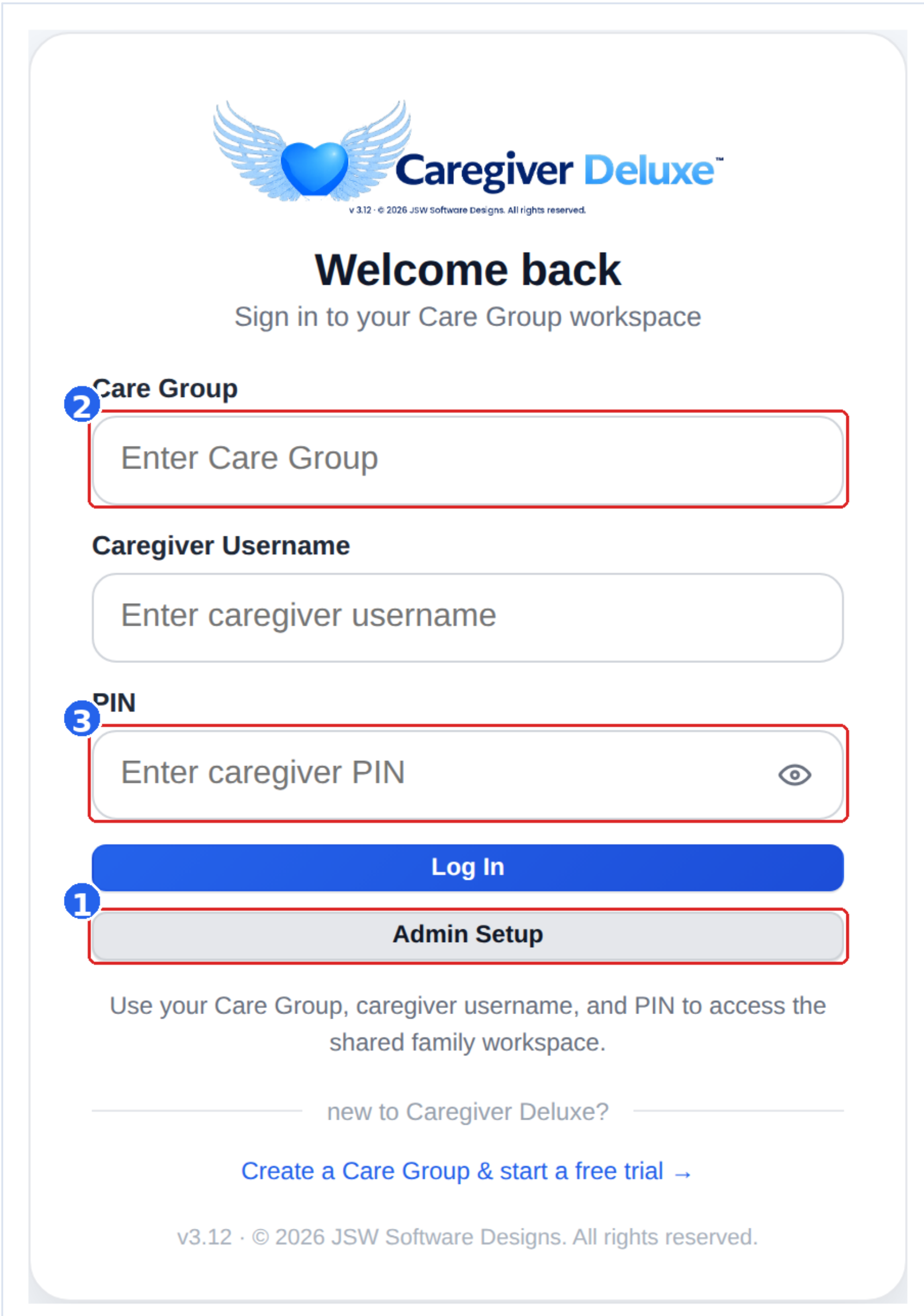

Figure 2.1 — The caregiver sign-in screen. New owners start with Admin Setup.

Step 2 — Sign in as the Administrator

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

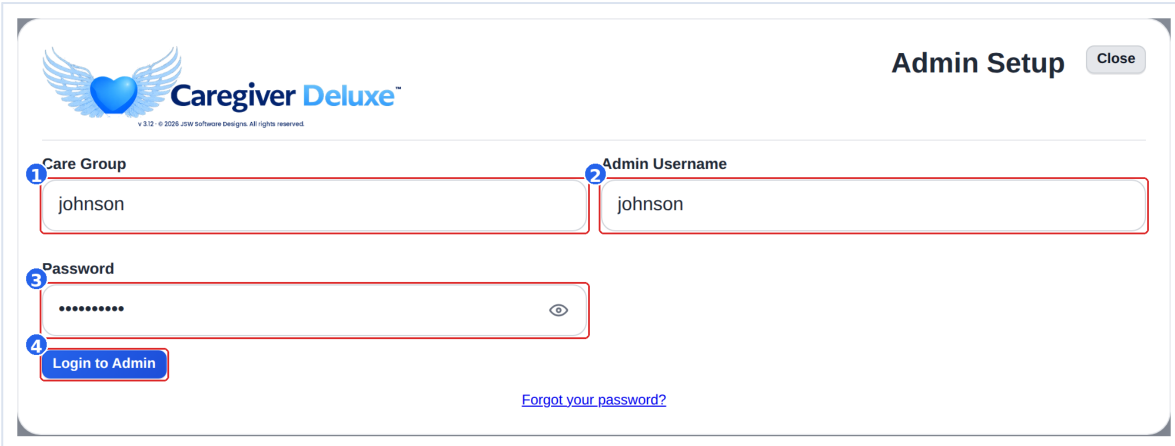

Figure 2.2 — The Admin Setup sign-in panel.

> **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.

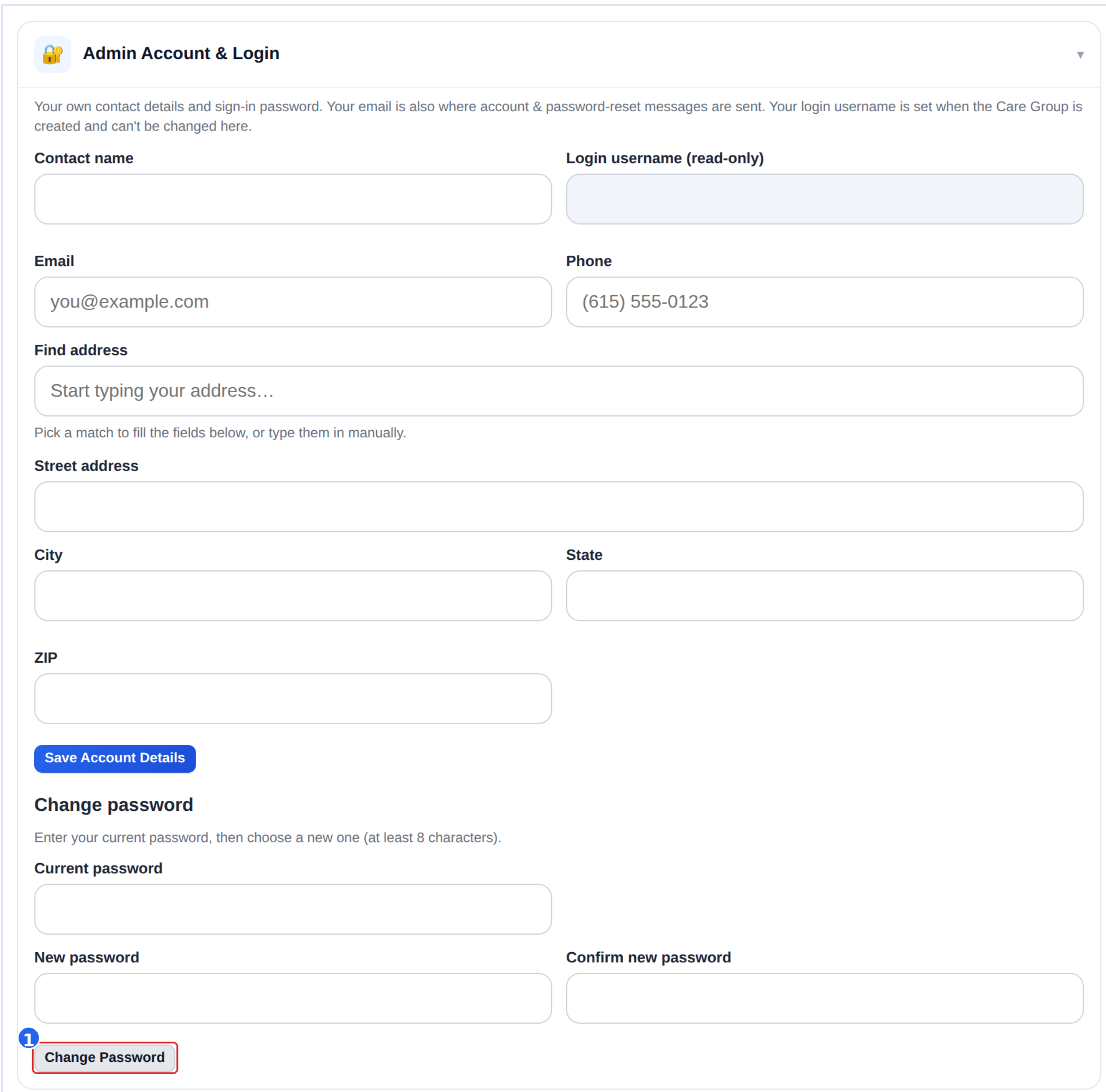

Figure 3.1 — Admin account details and the Change Password area.

3.2 Manage Clients

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

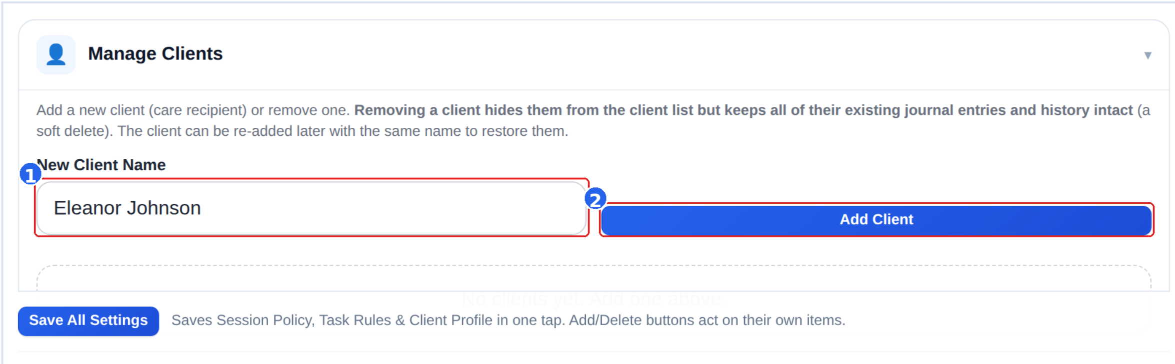

Figure 3.2 — Adding a care recipient.

> **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**.

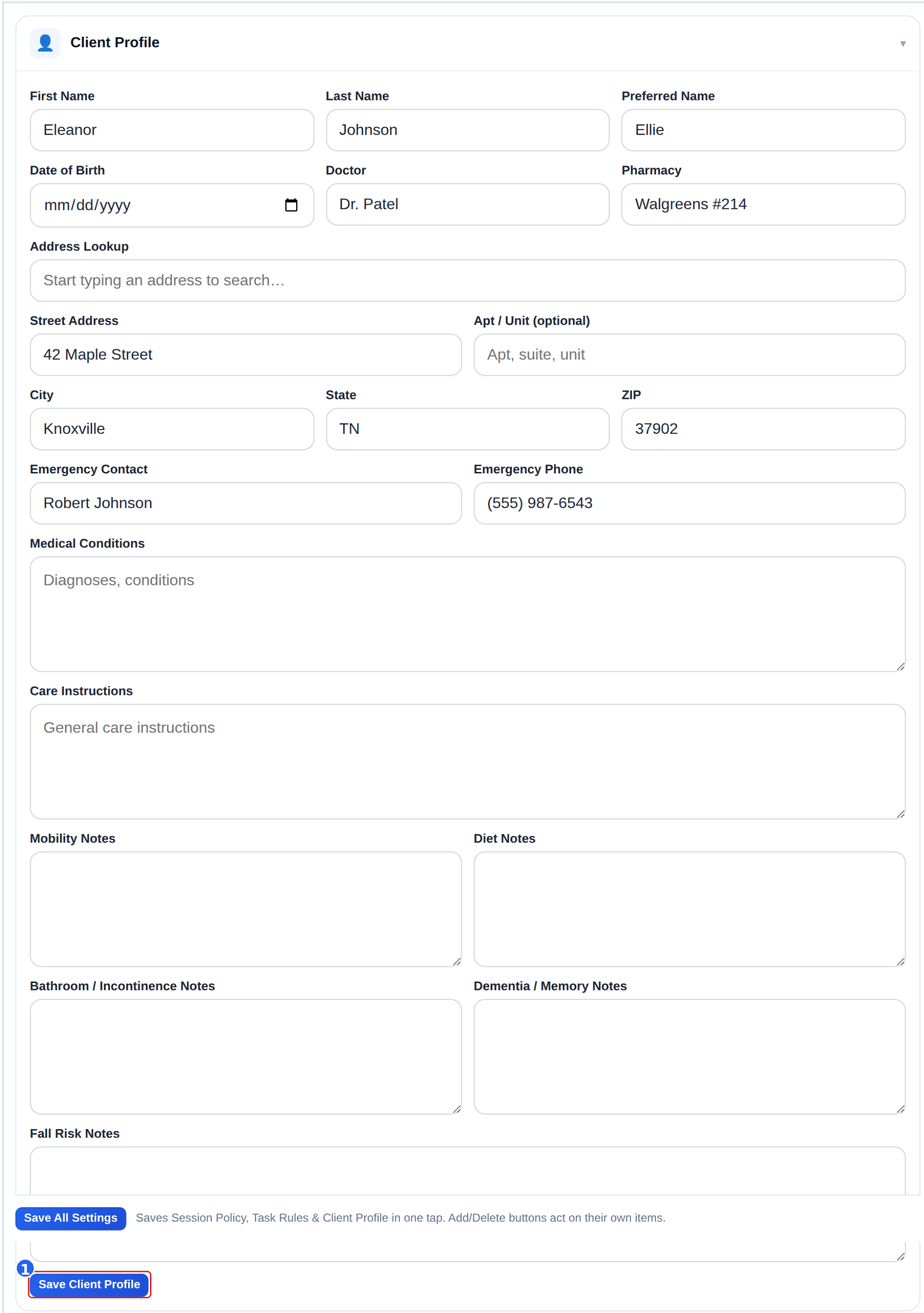

Figure 3.3 — The Client Profile, with contact, medical, and care-note fields.

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**.

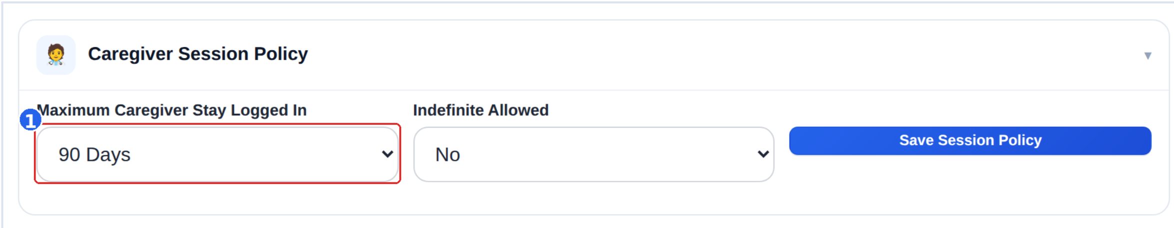

Figure 3.4 — Choosing how long caregiver sessions last.

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).

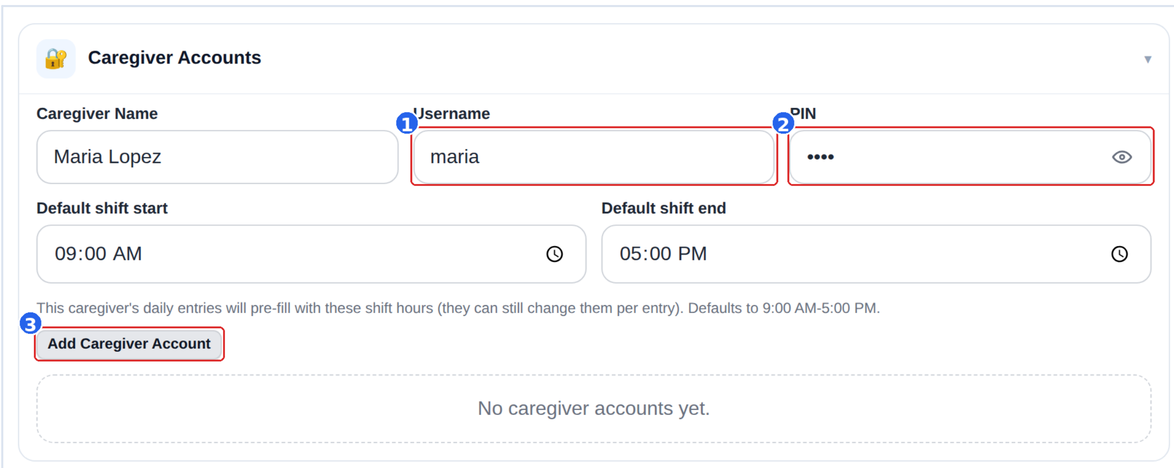

Figure 3.5 — Creating a caregiver login.

> **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.

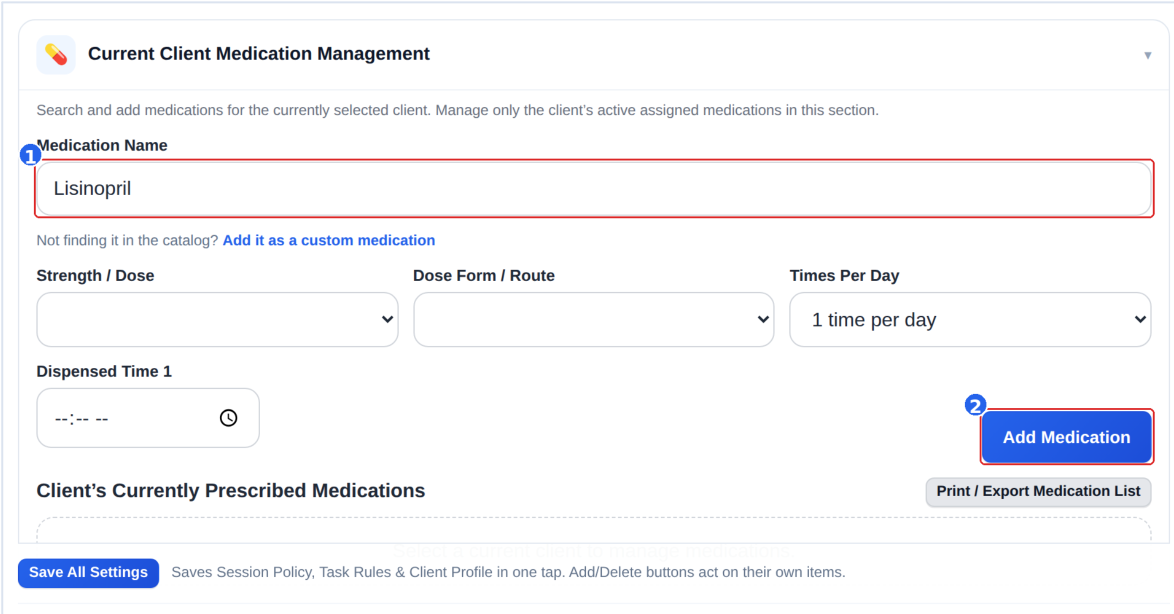

Figure 3.6 — Assigning a medication to the current client.

3.7 Client Medication Allergies

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

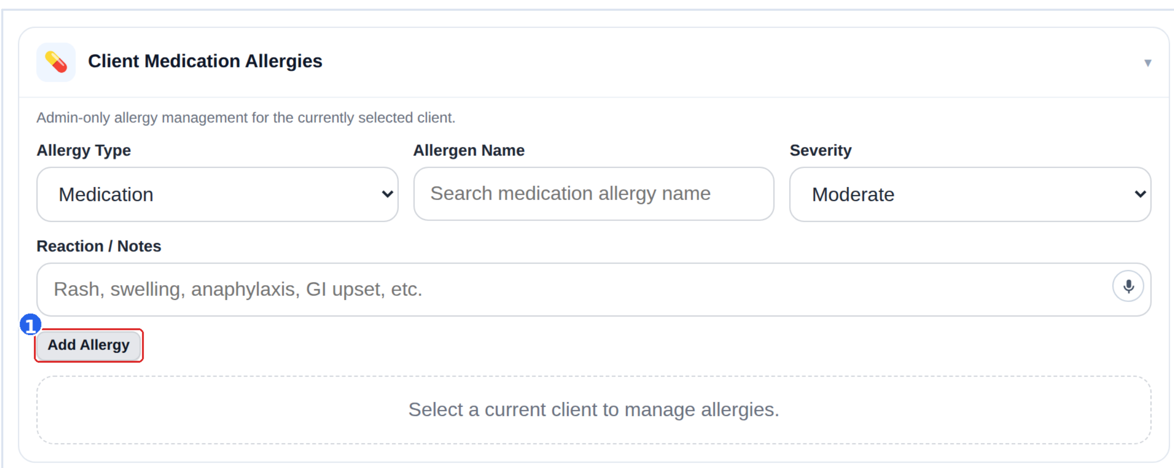

Figure 3.7 — Recording an allergy.

3.8 Daily Task Rules

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

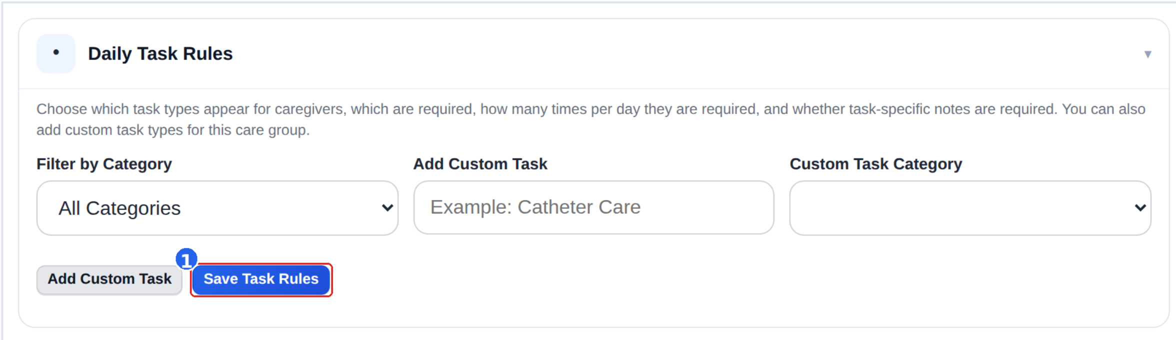

Figure 3.8 — Choosing which tasks appear on the daily timeline.

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.

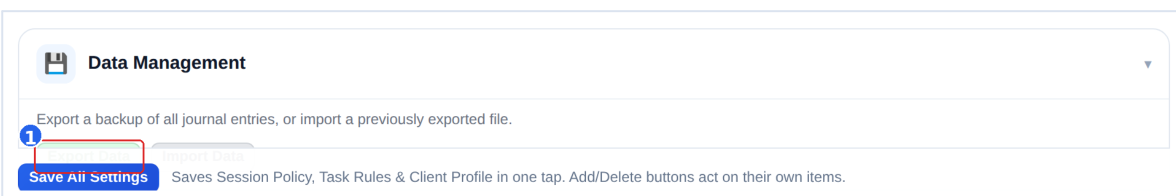

Figure 3.9 — Exporting and importing your data.

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**.

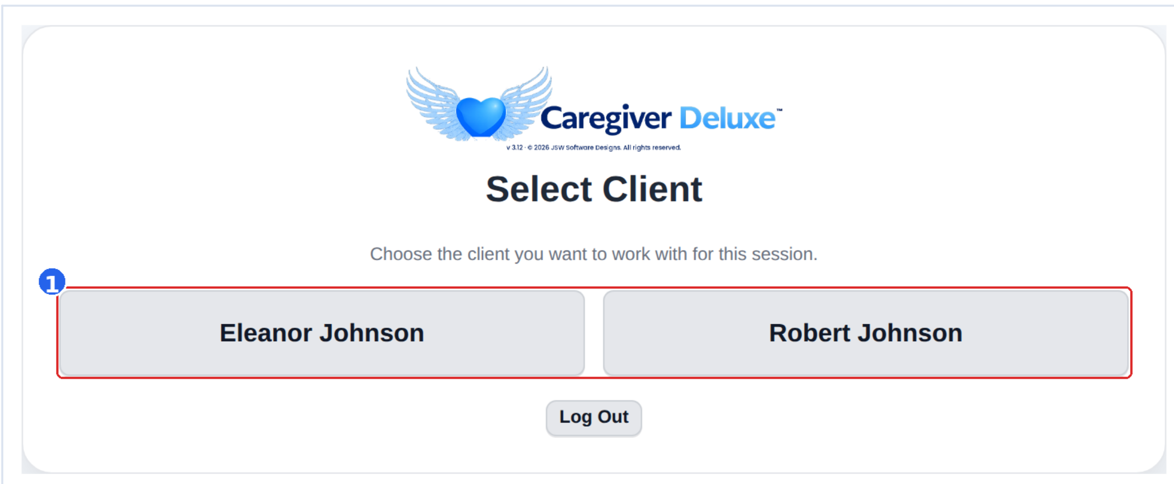

Figure 4.1 — Selecting the care recipient for your shift.

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.

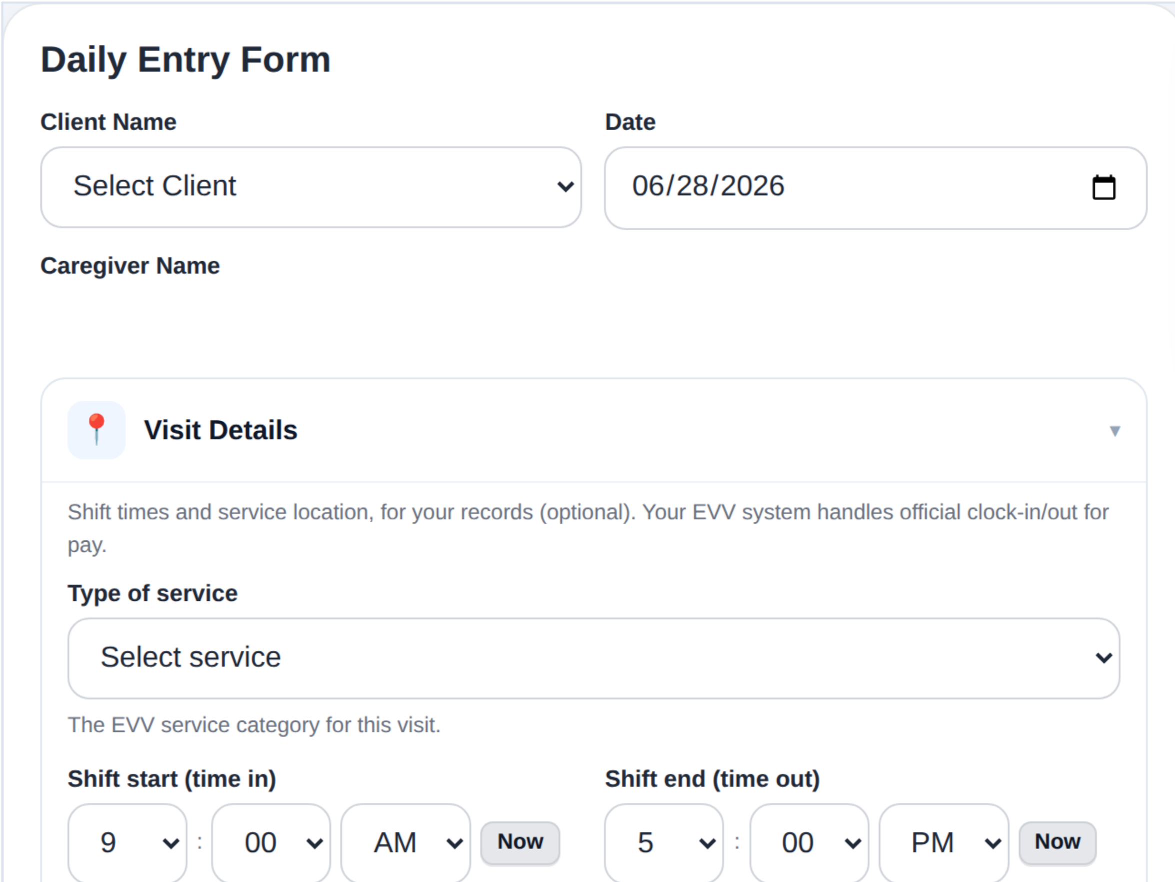

Figure 4.3 — Visit Details, including shift times and service location.

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

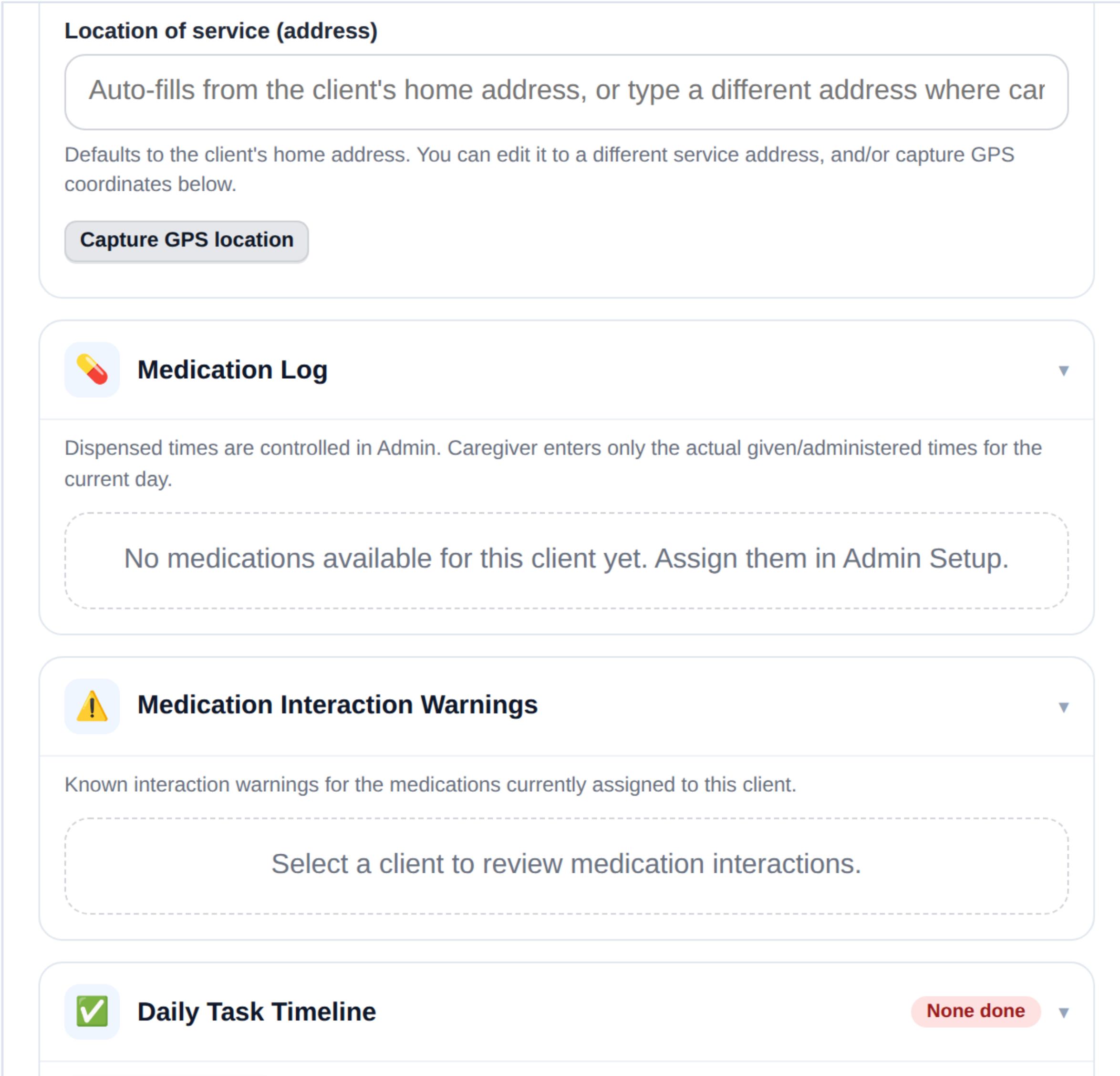

Figure 4.4 — Medication Log, Interaction Warnings, and the Task Timeline.

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).

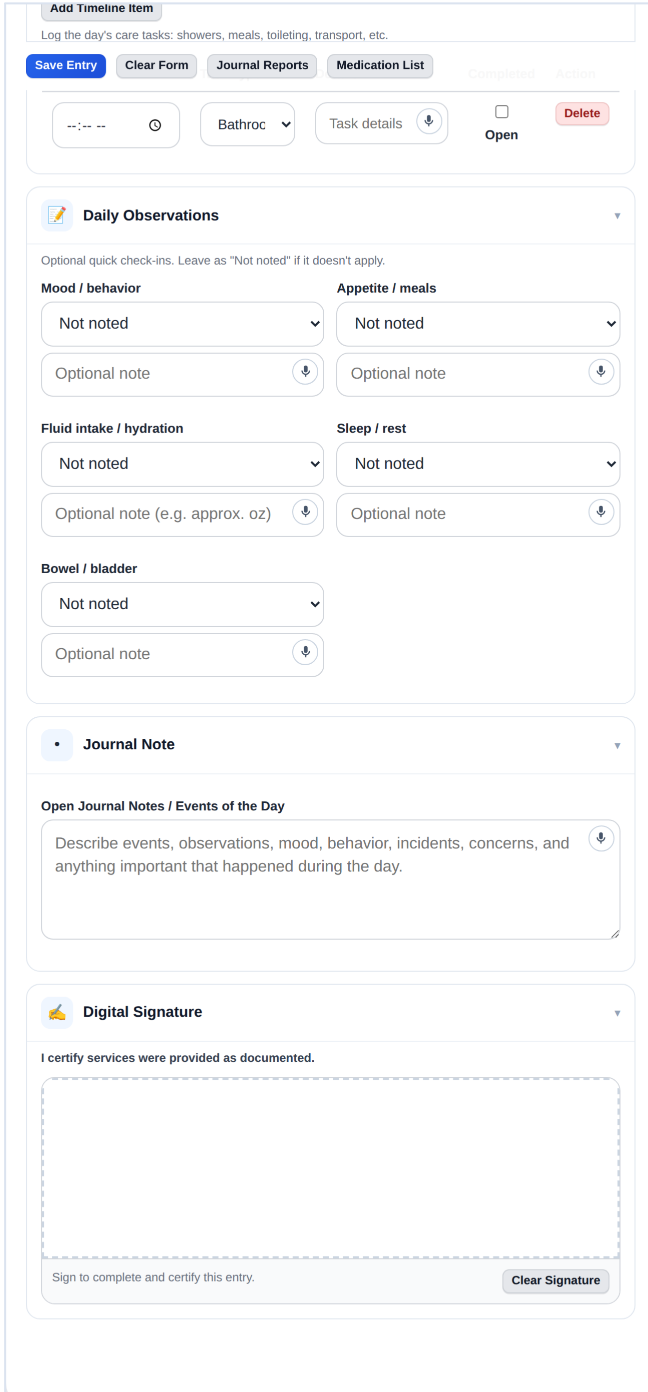

Figure 4.5 — Observations, Journal Note, and the Digital Signature.

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).

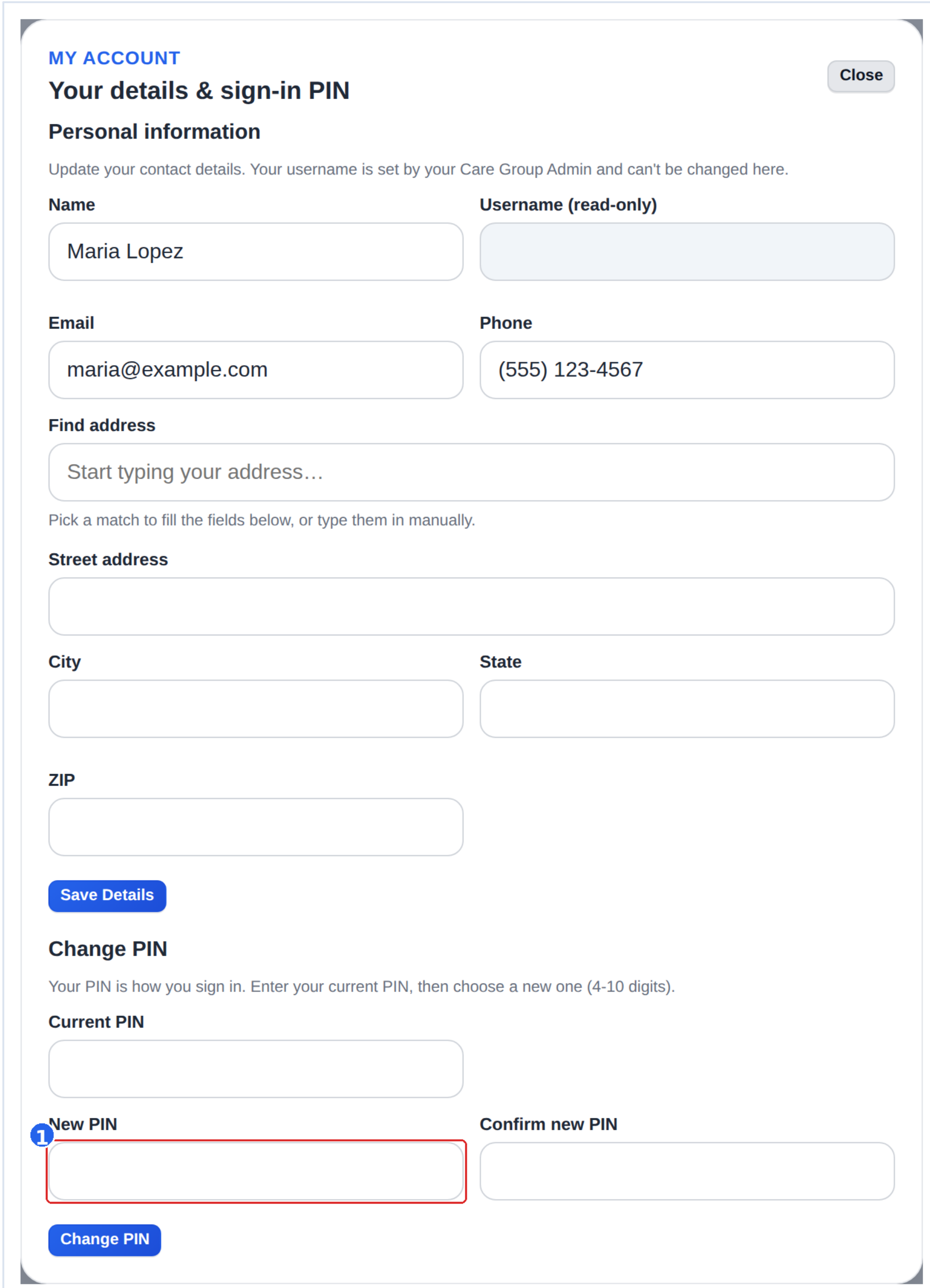

Figure 4.6 — A caregiver's own account and PIN settings.

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.

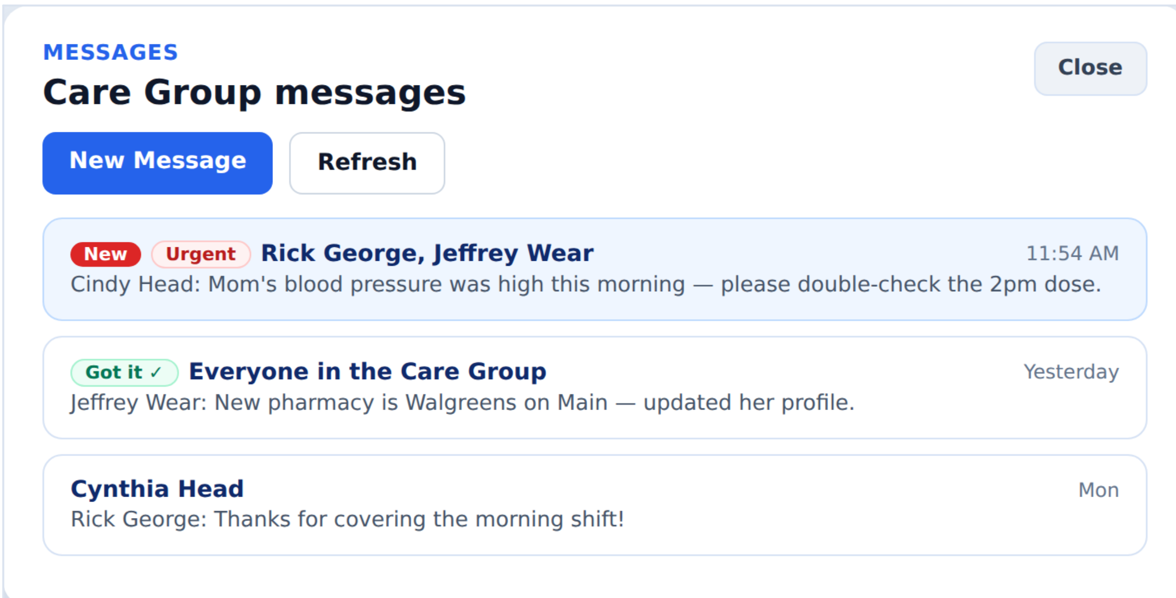

Figure 5.1 — The Messages window: inbox with New, Urgent, and acknowledgement tags.

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.

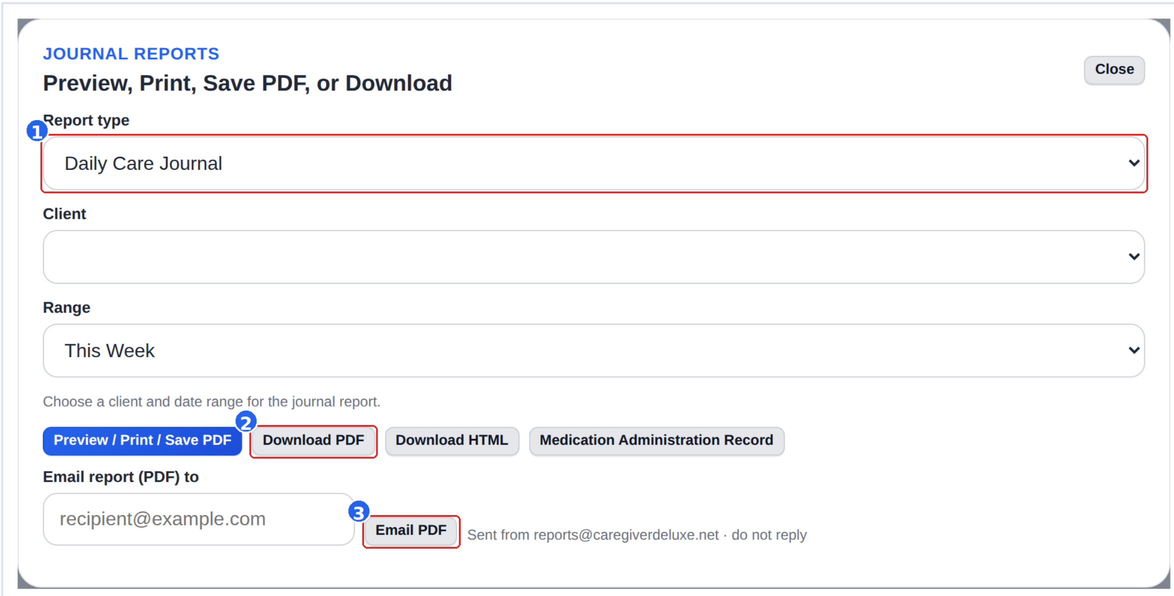

Figure 7.1 — The report builder.

- **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.

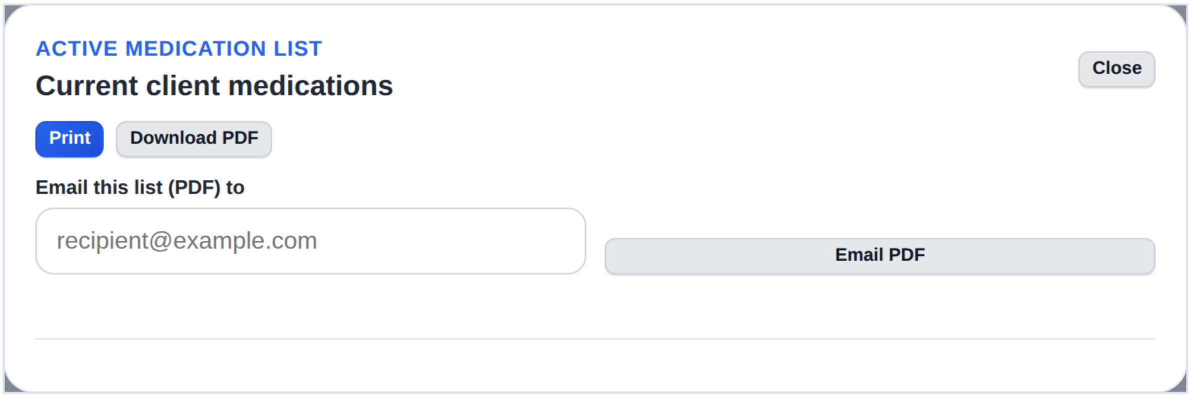

Figure 7.2 — The printable / emailable Medication List.

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.

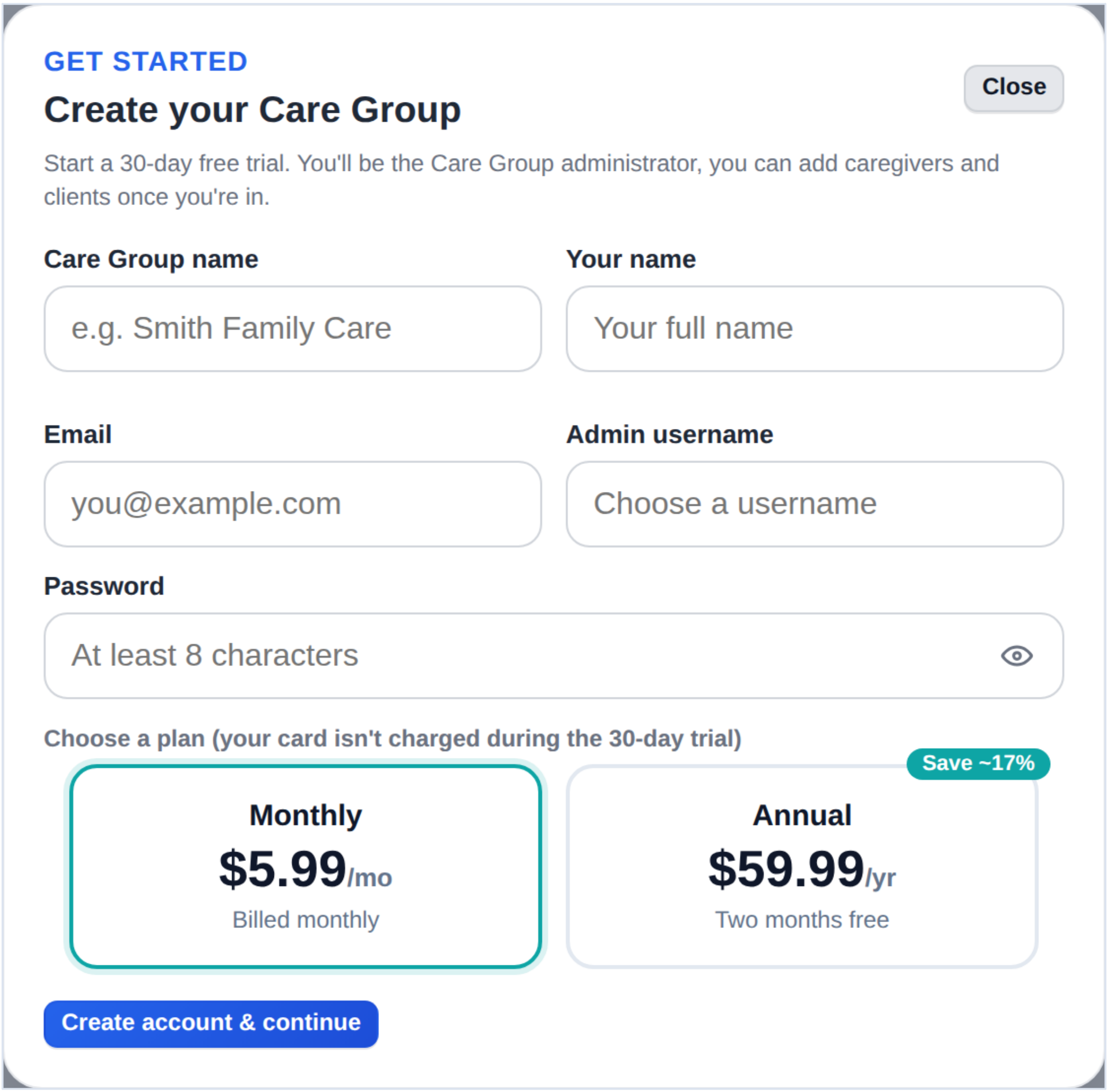

Figure 8.1 — Creating a Care Group and starting the free trial.

- **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.

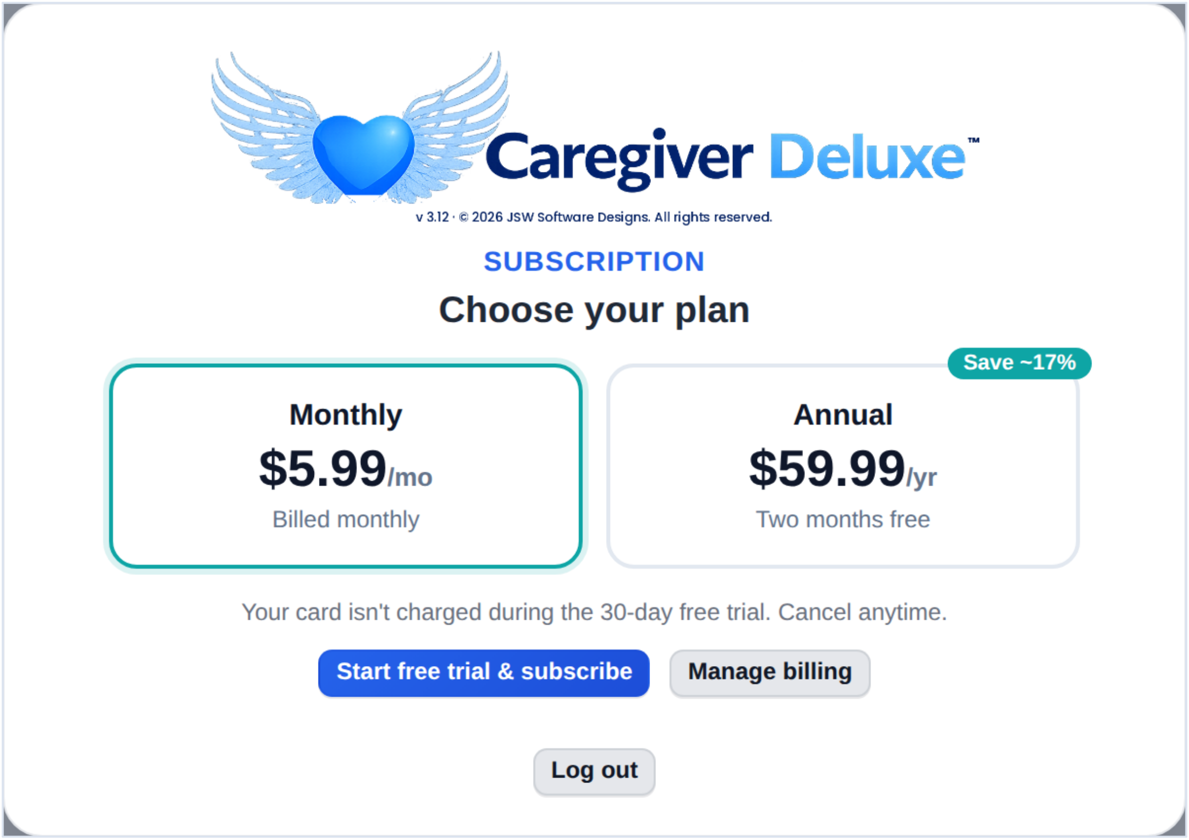

Figure 8.2 — The subscription / billing screen.

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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