



extended**Reach**  
powered by **k**care

# GCM BASIC USER TRAINING

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*Welcome to extendedReach!*

# Agenda



Accessing extendedReach



System Structure & Navigation



Getting Started



Support Resources



# What is extendedReach?

## Introduction

### CASE MANAGEMENT SOFTWARE

extendedReach is case management software for agencies that offer child welfare, community-based, and/or behavioral health programs.

### HOW IT HELPS

extendedReach helps agencies track case information, social work contacts, documents, and billing.

### COMPLIANCE

Keeps agencies compliant with due dates and regulations.

# Accessing extendedReach

- <https://login.extendedReach.com> or [https://\[SYSURL\].extendedReach.com](https://[SYSURL].extendedReach.com)
- Welcome email from [alerts@extendedreach.com](mailto:alerts@extendedreach.com)
- Temporary password - prompted to reset password upon first login
- If forget password, use link on login page that will send email with your password.

## Welcome to extendedReach! - Login Instructions



alerts@extendedreach.com

To Barb Odenweller

You can login to extendedReach by clicking this link:

<https://login.extendedreach.com>

Your user id is your email address:

[REDACTED]

[REDACTED]

# System Structure

## Cases

- Clients in Care
- Each client is a single case
- Each family member is a separate case; Cases can be linked

## Program(s)

- Links a Case to a Program
- Cases can be in multiple programs



# System Structure



## Activities

- Events that occur at a certain point in time
- Collateral contacts such as phone calls, letters, or email
- Usually have an associated narrative and/or file attachment
  - Cases – medical appointments, therapy/counseling sessions, ongoing documentation

## Reports

- Documents collected or written by staff, often with a due date and an associated file
  - Cases – assessments, treatment plans, incident reports, birth certificates, referring agency paperwork, school documentation



# Getting Started – Features

- Consolidated Files
  - Client Case File – Go to one record to add/upload/view all documents, add/change programs, etc. for one client
- Personalized Workspaces
- Scanner Inbox
- Agency Address Book
- Shared Forms & Files
- Email Alerts
- Appointment Calendar

# Workspace

- Workers\*
- Cases – assigned cases (caseload)
- Today's Schedule\*
- Pending Referrals\*
- Inbox
- Awaiting Approval\*
- Recent Activities
- Summary –
  - Late Tasks
  - Rejected Tasks
- My Tasks – Reminders

**My Stuff**  
My Workspace  
My Calendar

**Cases**  
Case Rosters  
Case Tasks

**Summaries**  
Casework  
Financial  
Demographics  
Intake  
Discharge  
Custom  
Staff  
Resources

**Administration**  
Organization Billing  
Organization Settings  
Program Settings  
System Settings

**Search**  
  
Case Last Name

Add Case Add General Activity Email Clients Help

**Jane's Cases** - Details -

Case	Prog	Sep/Aug	Next
Bell, Becky <sup>A</sup>	CNS	0.00/0.00	
Gordon, Bombay	BH	0.00/0.00	
Stone, Maggie	MEN	0.00/0.00	
Whitburn, Perry <sup>A</sup>	AM	0.00/0.00	
White, Lance	CNS	0.00/0.00	
Wilson, Samantha <sup>A</sup>	FP	0.00/0.00	09/23

<sup>A</sup>=No Active Authorizations

**Jane's Schedule for Today** Calendar iCal

Time	With	Worker	Program
No remaining appointments are scheduled for today.			

**Inbox** How does this work?

Date	Attachments
Inbox: BH Dept Inbox	
09/23/2020 02:52 PM	TX CAC - SWI 1.pdf File this
09/23/2020 02:52 PM	TX - CAC- Mental Health Assessme... File this
09/23/2020 02:52 PM	TX CAC - SWI 1.pdf File this
02/03/2021 10:45 AM	doc-Driver's Lic.jpg File this
02/03/2021 10:45 AM	doc-Driver's Lic.jpg File this

**Recent Activities**

Date	Activity Type	Case	Status
No activities have been created recently.			

**Jane's Summary**

Open Cases: 6  
Late Tasks: 11  
Rejected Tasks: 1

**Jane's Tasks** All iCal

**Overdue**

Treatment Plan (WORD) for Gordon, Bombay	12/20/2020
NS- Aftercare Plan for Bell, Becky	09/07/2021

Show overdue (11)



# General Activities

- Activities that can be created that are not Client activities and do not live in the Client record.
- Can create custom forms
- Staff typically fill out General Activities
- All completed General Activities in the left-hand menu>Casework>General Activities



# Calendar

- Track Non-Client appointments for staff
- Track working hours for staff
- Track client appointments
- Can allow admins to schedule appointments for staff
- Pull reports of all appointments for the day
- Text reminders to client

Abbey Admin Group Tasks Add Non-Client Appointment Working Hours Print Help

Feb 13 - 19, 2022

Availability Month Week Day List

	Mon 2/13	Mon 2/14	Tue 2/15	Wed 2/16	Thu 2/17	Fri 2/18	Sat 2/19
11am							
12pm							
1pm							

Abbey Admin  
Betty Supervisor  
Bill Caseworker  
Can Worker Any Baby  
Charlie Caseworker  
Clark Allen  
Cody Bell  
Don Caseworker  
Doug Funny  
Fred J. Flintstone  
George Caseworker  
Ginger Foutley  
Jamie Strobble  
Jane Caseworker  
Jane Jetson  
Jeremy Slatton  
Jill Supervisor  
Julie B. Jones  
Julie Skarich  
Linda Supervisor


Group Appointments Excel Help

	Date	Time	Name	Organization	Program	Title	Caseworker	Related Narrative
10	2018 - April							
	04/24/2018	10:00 AM	Bell, Nicole	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Jane	
	04/24/2018	12:00 PM	Remington, Jeremy and Bev	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Charlie	
	04/24/2018	12:00 PM	Mouse, Mickey	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
	04/24/2018	3:00 PM	Lovett, Jasmine	Helping Hands	Behavioral Health	Case Management	Caseworker, Charlie	
	04/26/2018	12:00 PM	Bear, Fonzi	Helping Hands	Behavioral Health	Family Therapy	Caseworker, Charlie	
	04/26/2018	6:00 PM	Prouder, Brad and Jennifer	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, Charlie	
	04/27/2018	1:00 PM	Remington, Jeremy and Bev	Helping Hands	Behavioral Health	Assessment without Client	Caseworker, Charlie	
	04/27/2018	12:00 PM	Renyolds, Joshua	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
	04/28/2018	12:00 PM	Johnson, Valerie	Helping Hands	Supervised Family Visitation	Initial Visit (WF)	Caseworker, George	
	04/28/2018	5:00 PM	Mouse, Mickey	Helping Hands	Behavioral Health	Assessment with Client (WF)	Caseworker, George	
15	2018 - May							
	05/03/2018	12:00 PM	Jones, Carrie	Helping Hands	Behavioral Health	Assessment with Client (WF)	Supervisor, Sophie	
	05/04/2018	12:00 PM	Lovett, Jasmine	Helping Hands	Behavioral Health	Individual Therapy	Caseworker, Charlie	

# Consolidated Files

Case **OPEN**

**Sheldon Cooper**  
Kaleidacare RES



Diabetes  
Life-Threatening Allergy  
Dietary Issue(s)  
Psychotropic Meds  
Age: 16 yrs (7/15/05)  
Stats: 223 days, 1 plcmts...

**Placed With**  
**Green Meadows Cottage**  
Residential  
Placed On: 12/15/2020  
Residential

Back Add Activity Add Report Print Help

General Referral Health Compliance People Case File Treatment\* Financial Comments\*

**General Case Information**

Agency Case #:	C3001	Organization:	Kcare Residential
Case Manager:	Case Manager Training	Program:	Kaleidacare RES
Secondary:	- Not Specified -	TPR Ordered:	
Worker:		Perm. Plan Goal:	Reunification
Removal Date:	Unknown removal date	Anticipated	
Admission Date:	12/15/2020	Discharge:	
Admission Type:	Planned		
Referral Reason:	Failure to Protect		
Add. Reason:	- Not Specified -		
Prior Episode(s):	- Not Specified -		
Customer #:	C3002		


**Client Information**

Last Name:	Cooper
First Name:	Sheldon
Middle Name:	
Nickname/AKA:	
Personal Phone:	
Personal Email:	
Date of Birth:	07/15/2005
SSN:	

- Case record – tabs
- Compliance tab – Customized with forms needed for each program

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General Referral Health **Compliance** People Case File Treatment\* Financial Comments\*

**Shift Staff Documentation**

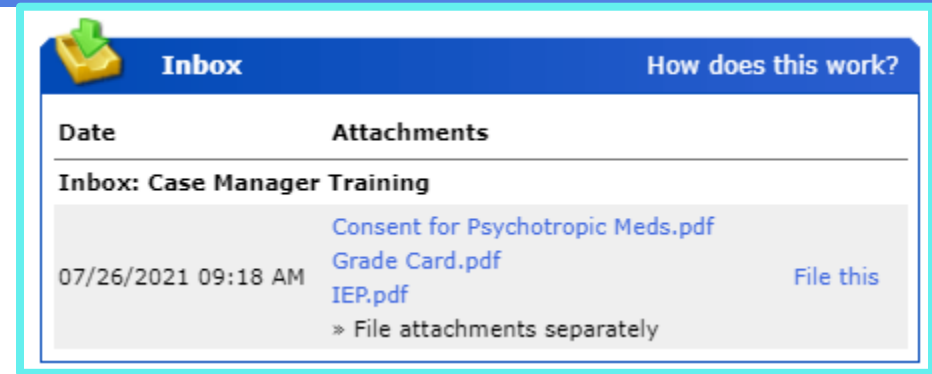
<input checked="" type="radio"/> Daily Progress Note (AM)	07/26/2021 :
<input checked="" type="radio"/> Daily Progress Note (ON)	07/26/2021 :
<input checked="" type="radio"/> Daily Progress Note (PM)	07/25/2021 :
<input type="radio"/> Incident Report (optional)	<a href="#">Add Report</a>

**Medications**

<input checked="" type="radio"/> Medication Admin. Record - Meds 1-13 (Index 31)(Residential)	<a href="#">Add Report</a>
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# Scanner Inbox

- Inbox –
  - Scan and email documents with an email-capable scanner directly to your Scanner Inbox (do not BCC) using the email address associated with your Scanner Inbox
  - Easily find the email address by clicking “How does this work.”
  - Watch short video on workspace
  - File documents to case or staff file.



Where should this be stored?

**Subject:** Files for Casework Client

File Preview

Email Body

1 of 2

This file has limited permissions. You may not have access to some features. [View permissions](#)

**California State Birth of Wealth** State Index No. \_ 0000001 \_  
BUREAU OF VITAL STATISTICS

**1 PLACE OF BIRTH**  
City and Country of  
SAN FRANCISCO

**STANDARD CERTIFICATE OF BIRTH**  
(No. St. Francis Hospital st.;  
Ward) and number.]

**2 FULL NAME OF CHILD** JOHN DOE  
(yet named, make supplemental report, as directed)

Is this related to a case or staff? ☒ Case ☐ Staff

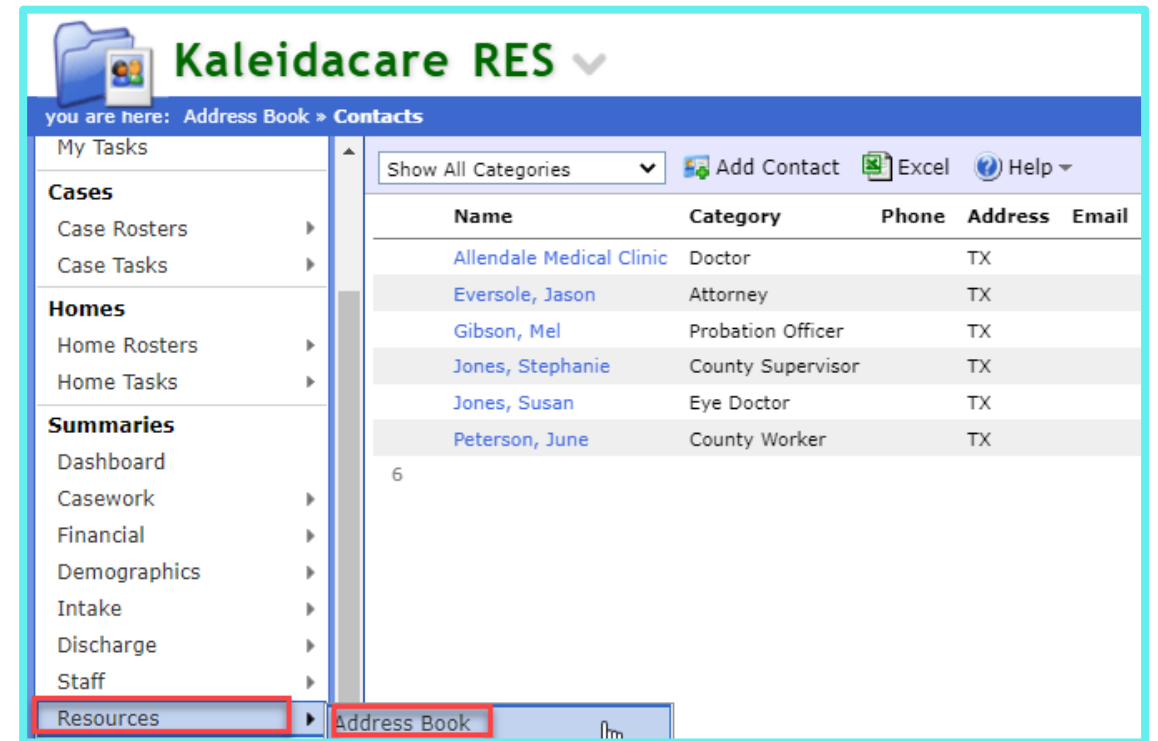
What active case is this related to?

or [Search closed cases](#)

[Save and go to](#) [Save as Draft](#) [Delete](#) [Cancel](#)

# Agency Address Book

- Add clinical professionals, county/state workers, etc. to a central address book so can easily associate with cases and have one record to update if contact information changes.
- This also allows staff to view all clients who are associated with a particular contact.



# Shared Forms & Files

- A centrally located space for staff to access resources including web links and files.

Examples:

- HR forms
- Policies and Procedures
- Menus
- Recreation calendars
- Sample treatment goals

The screenshot shows the Kaleidacare RES web application. The left sidebar contains a navigation menu with categories: My Tasks, Cases (Case Rosters, Case Tasks), Homes (Home Rosters, Home Tasks), and Summaries (Dashboard, Casework, Financial, Demographics, Intake, Discharge, Staff). The 'Resources' category is highlighted with a red box, and its sub-menu is open, showing 'Address Book' and 'Shared Forms + Files' (also highlighted with a red box). The main content area displays a table titled 'Shared Forms + Files' with columns: Total, Title, Description, File/Link(s), and Last Modified. The table lists several forms, including Case Forms, Employee Forms, and Home Forms, with their respective counts, titles, descriptions, and last modified dates.

Total	Title	Description	File/Link(s)	Last Modified
2	<b>Case Forms</b>			
	<a href="#">Discipline Policy</a>	-	- None -	07/26/2021 08:18 PM
	<a href="#">Monthly Recreation Schedule</a>	-	- None -	07/26/2021 08:19 PM
2	<b>Employee Forms</b>			
	<a href="#">FMLA Forms</a>	-	- None -	07/26/2021 08:18 PM
	<a href="#">PTO Request Form</a>	-	- None -	07/26/2021 08:18 PM
1	<b>Home Forms</b>			
	<a href="#">Menus</a>	-	- None -	07/26/2021 08:19 PM
5				

# Email Alerts

- Email Alerts are pre-planned email messages created within eR announcing either an “Action-Based” Event or a “Scheduled” Event within cases and staff.
  - “Action-Based” events include workflow related user actions, such as approvals, placements, discharges, Incidents, etc.
  - “Scheduled” events include specific dates such as birthdays, court dates, medical appointments, etc.
- Screenshots show sample email and what appears when click the link (rejected report with reason).

## Case Report Rejected Visitation Plan (Rejected): Stark, Tony



alerts@extendedreach.com

To Barb Odenweller

Click the following link to access the report:

<https://sbfc.extendedreach.com/Clients/Sandbox/sandboxfc.nsf/0/B64FA0F29EE9C10F852586B90062799B>

This notification was triggered by a database change by Barb Odenweller

Back Edit Submit for Approval Generate Narrative Email Delete Print

General

Comments

Report Information

Type:	Visitation Plan	Status:	Rejected
Due:	03/15/2021	Performed By:	Barb Odenweller
		Submit To:	Barb Odenweller
History:	04/16/2021 12:55 PM CST submitted for approval by Barb Odenweller		
	04/16/2021 12:55 PM CST rejected by Barb Odenweller		
Reason Rejected:	Need more detail and address AWOL Risk		

Additional Information

Date Plan Created/Revised

04/15/2021

Plan Details

test










# Compliance and Due Date Tracking

- Program rules are built in and dates are tracked
- High-level color-coded checklist to provide visual representation of last item completed with due or expiration dates
  - Red – missing or past due
  - Yellow – due soon
  - Green – current
  - White – optional


General Compliance Case File Financial Insurance\* People Comments

Show 5 hidden, optional items.












### Intake

 Auth to Report and Consent for Services	04/05/2019	:
 Authorization for Service	Due on 11/15/2019	:
 Cancellation Policy (WF)	Due on 11/20/2019	:
 County Background Check	11/15/2019	:
 Photo	06/06/2019	:
 Release of Information	Expired 11/15/2020	:
 Rights and Grievance Acknowledgement (WF)	07/08/2020	:
 RT - Consent Forms	Add Report	:
 Therapeutic Visitation Guidelines (WF)	11/15/2019	:



### Assessment

 RT - Therapy Session	In proc. 06/14/2021	:
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### Casework

 Assessment Session	Add Activity	:
 Behavior Tracking	09/26/2020	:
 Case Management	07/13/2021	:
 Comprehensive Assessment (WF)	Due on 11/17/2019	:
 Comprehensive Assessment (WORD)	In proc. 05/27/2021	:
 Family Therapy Monthly Report	Add Report	:
 Family Therapy with Client	11/15/2019	:
 Family Therapy without Client	Add Activity	:
 Individual Therapy	07/21/2021	:
 Monthly Report	Due on 11/15/2019	:
 Therapeutic Visitation	11/15/2019	:

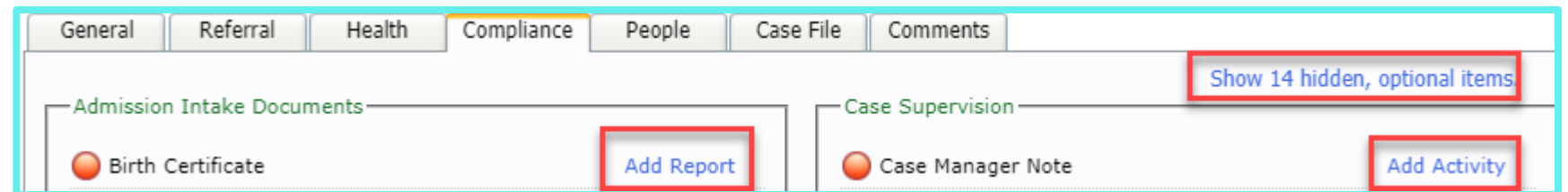
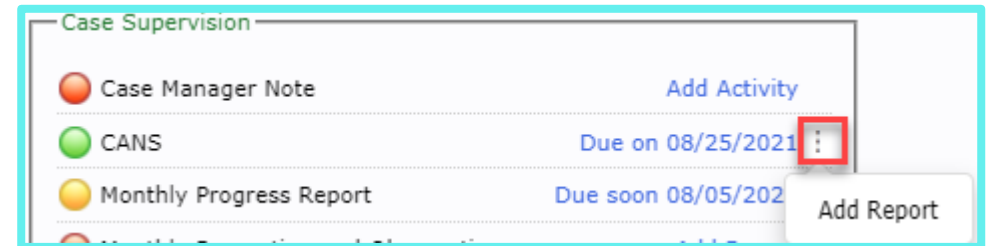
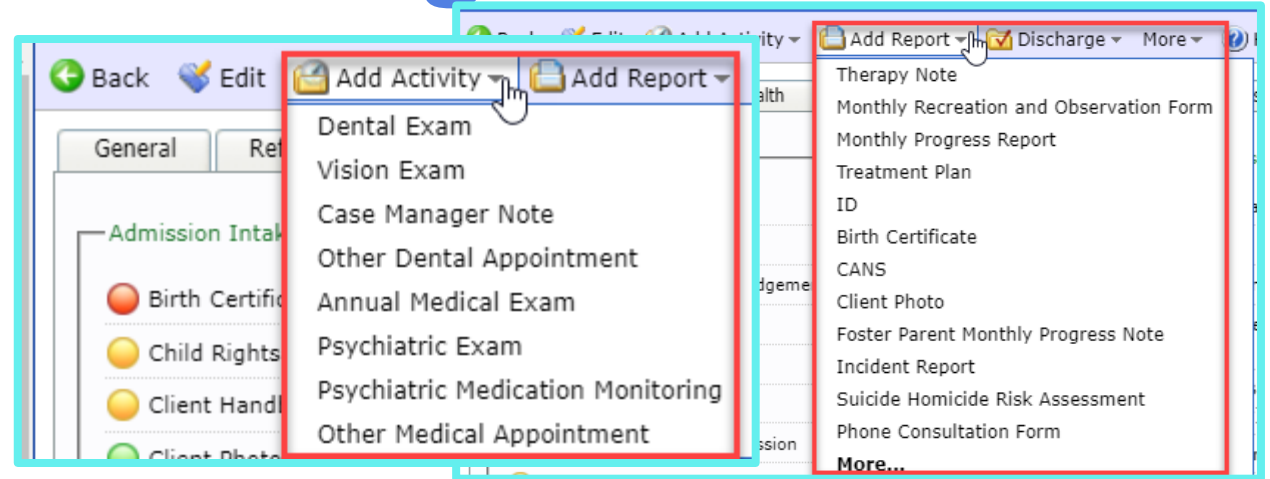
### Treatment Plan and Review

 Client Info - Comprehensive Assessment	Due on 11/20/2019	:
 Service Treatment Plan	Due on 11/16/2019	:



# Compliance Tab – Adding Activities & Reports

- Add Activities and Reports from buttons on top menu bar
- Add using placeholders on the compliance screen next to each form name.
  - Note there are hidden optional forms that can be accessed by clicking that link.
- Use 3 dots to access add button and see a history of completed forms



# Compliance Tab – Billable Activities

- Activities must be used to track billable services
- Unit based billing
- Encounter based billing
- Medicaid 8 minute rule
- Track time, duration, \$ amount


Unit Length: 60 minutes

Unit Type: Individual ▼







Rate: \$87.00

- ☐ Daily activity (completed Sun-Sat)
- ☐ Daily activity (completed Mon-Fri)
- ☐ Unique activity
- ☒ Can schedule
- ☐ No show
- ☐ Requires approval
- ☐ Group activity
- ☒ Record units
- ☐ Record units using start and end days (vs. time)
- ☐ Units and fee (if applicable) are encounter-based (not based on duration)
- ☐ Use quarter hour periods when recording time
- ☐ Use formula to determine units
- ☐ Use Medicaid 8-minute rule for units
- ☐ Record duration with start and stop times
- ☐ Record duration without start and stop times
- ☒ Record fee
- ☐ Rate varies based on level
- ☒ Include in case note summary
- ☒ Save and add another
- ☐ Use Custom Form Builder
- ☐ Check for duplicate activity type on same day
- ☒ Use system assigned abbreviation
- ☐ Show in compliance checklist

# Compliance Tab – Billable Activities


**Activity**

**Home Study (Licensed)**  
for Allen, Simon and Randy  
Helping Hands  
Adoption  
In-State  
Status: New  
  
Created:  
02/15/2022 09:55 AM MDT


 Cancel  Save as Draft  Complete  Add Another  Print  Help ▾

General Billing Comments

Activity Information

Activity Type: Home Study (Licensed) 

Status: New

Activity Date: 02/15/2022 


Performed By: Caseworker, Charlie ▾

Unit Rate: \$600.00


Total: \$600.00

General Billing Comments

Activity Information

Activity Type: Initial Assessment Interview 

Status: New

Activity Date: 02/15/2022 

Performed By: Caseworker, Charlie ▾

Start Time: 9 ▾ : 55 ▾ AM ▾

Submit To: Supervisor, Linda S. ▾




End Time: 10 ▾ : 55 ▾ AM ▾

Unit Rate: \$100.00

Duration: 60 min

Total: \$100.00

# Casework Report– Units by Client

 Expand All  Excel  Help ▼																		
#	Units	Amount		Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug						
4	4.33	\$433.00	+	2022	4.33	\$433.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	
111	171.49	\$13,993.09	+	2021	7.80	\$270.00	12.00	\$1,453.98	2.33	\$266.00	27.00	\$6,850.00	24.00	\$997.50	25.33	\$791.50	3.33	\$426.00
43	38.00	\$11,125.00	+	2020	1.00	\$75.00	3.00	\$245.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	1.00	\$200.00
17	19.67	\$1,899.00	+	2019	1.00	\$300.00	5.00	\$420.00	0.00	\$0.00	1.00	\$20.00	0.00	\$0.00	2.67	\$304.00	3.00	\$170.00
65	68.75	\$21,451.00	+	2018	0.00	\$0.00	0.00	\$0.00	5.00	\$800.00	15.00	\$3,200.00	12.00	\$6,465.00	5.00	\$725.00	1.00	\$100.00
240	302.24	\$48,901.09			14.13	\$1,078.00	20.00	\$2,118.98	7.33	\$1,066.00	43.00	\$10,070.00	36.00	\$7,462.50	33.00	\$1,820.50	8.33	\$896.00

- Track units, duration, and billable services
- Sort billable services by client, worker, monthly, weekly

# Financial Reports

- All Organizations -

**My Stuff**

- My Workspace
- My Calendar

**Cases**

- Case Rosters
- Case Tasks

**Summaries**

- Casework
- Financial**
- Demographics
- Intake
- Discharge
- Custom
- Staff
- Resources

**Administration**

- Organization Billing
- Organization Settings
- Program Settings
- System Settings

**Search**

Search... Go

Case Last Name

**Workers**

**Caseworker**

- Admin, Abbey
- Allen, Clark
- Any Baby, Can Worker
- Bell, Cody
- Caseworker, Bill

**Financial**

- Aging Report
- Unpaid Claims
- Authorizations
- Average Fee
- Branch Balances
- Claims: Rejected
- Credit Balances
- Payments: Insurance
- Payments: Unapplied
- Payments: Other
- Posted: Adjustments
- Posted: Payments
- Posted: Prepaid Funding
- Posted: Receivables
- Posted: Revenue
- Posted: Transfers

- All Organizations -

**My Stuff**

- My Workspace
- My Calendar

**Cases**

- Case Rosters
- Case Tasks

**Summaries**

- Casework
- Financial
- Demographics
- Intake
- Discharge
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- Staff
- Resources

**Administration**

- Organization Billing
- Organization Settings
- Program Settings
- System Settings

**Search**

Search... Go

Case Last Name

**Workers**

**Caseworker**

- Admin, Abbey
- Allen, Clark
- Any Baby, Can Worker
- Bell, Cody

**Financial**

- Aging Report
- Unpaid Claims
- Authorizations
- Average Fee
- Branch Balances
- Claims: Rejected
- Credit Balances
- Payments: Insurance
- Payments: Unapplied
- Payments: Other
- Posted: Adjustments
- Posted: Payments
- Posted: Prepaid Funding
- Posted: Receivables
- Posted: Revenue
- Posted: Transfers

**Administration**

- Organization Billing
- Organization Settings
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- System Settings

**Search**

Search... Go

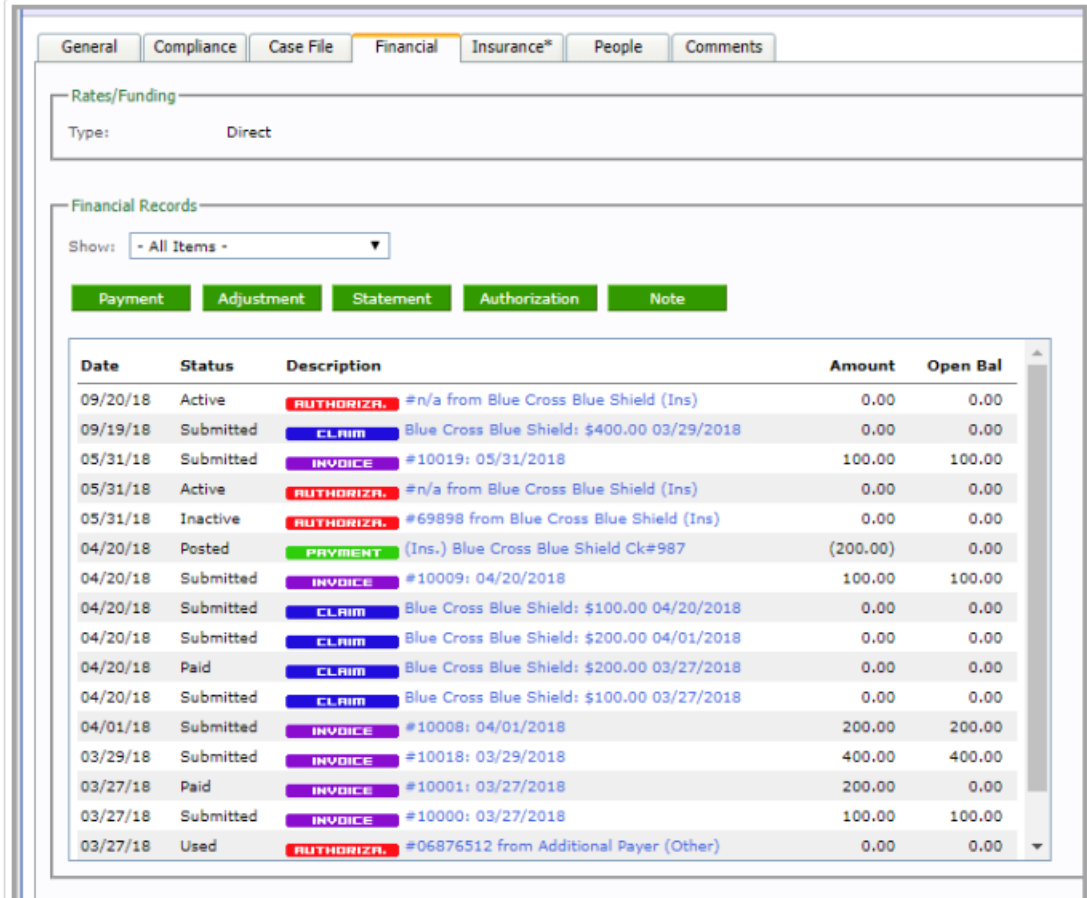
Case Last Name

**Financial Reports**

- Claims: Generate
- Claims: Ready to Transmit
- Claims: Transmitted Batches
- Claims: Print
- Invoices: Generate
- Invoices: Print
- Payments: Undeposited
- Payments: Deposited
- Remittance: Unprocessed
- Remittance: Completed
- Remittance: Import EDI Data
- Setup: Funding Organizations
- Setup: Insurance Providers
- Setup: Prepaid Funding

# Enterprise Financials

- Track detailed invoices and claims
- Track payments, authorizations, insurance, and account balances
- Send financial summary data to your accounting system
- Works with Waystar Claims Management currently



The screenshot displays the 'Financial' tab of the Enterprise Financials software. The interface includes a top navigation bar with tabs for General, Compliance, Case File, Financial (selected), Insurance\*, People, and Comments. Below the navigation bar, there are sections for 'Rates/Funding' (Type: Direct) and 'Financial Records'. The 'Financial Records' section has a 'Show:' dropdown set to '- All Items -' and five filter buttons: Payment, Adjustment, Statement, Authorization, and Note. The main area contains a table with the following columns: Date, Status, Description, Amount, and Open Bal. The table lists various financial transactions, including authorizations, claims, and invoices, with their respective dates, statuses, descriptions, and amounts.

Date	Status	Description	Amount	Open Bal
09/20/18	Active	<b>AUTHORIZA.</b> #n/a from Blue Cross Blue Shield (Ins)	0.00	0.00
09/19/18	Submitted	<b>CLAIM</b> Blue Cross Blue Shield: \$400.00 03/29/2018	0.00	0.00
05/31/18	Submitted	<b>INVOICE</b> #10019: 05/31/2018	100.00	100.00
05/31/18	Active	<b>AUTHORIZA.</b> #n/a from Blue Cross Blue Shield (Ins)	0.00	0.00
05/31/18	Inactive	<b>AUTHORIZA.</b> #69898 from Blue Cross Blue Shield (Ins)	0.00	0.00
04/20/18	Posted	<b>PAYMENT</b> (Ins.) Blue Cross Blue Shield Ck#987	(200.00)	0.00
04/20/18	Submitted	<b>INVOICE</b> #10009: 04/20/2018	100.00	100.00
04/20/18	Submitted	<b>CLAIM</b> Blue Cross Blue Shield: \$100.00 04/20/2018	0.00	0.00
04/20/18	Submitted	<b>CLAIM</b> Blue Cross Blue Shield: \$200.00 04/01/2018	0.00	0.00
04/20/18	Paid	<b>CLAIM</b> Blue Cross Blue Shield: \$200.00 03/27/2018	0.00	0.00
04/20/18	Submitted	<b>CLAIM</b> Blue Cross Blue Shield: \$100.00 03/27/2018	0.00	0.00
04/01/18	Submitted	<b>INVOICE</b> #10008: 04/01/2018	200.00	200.00
03/29/18	Submitted	<b>INVOICE</b> #10018: 03/29/2018	400.00	400.00
03/27/18	Paid	<b>INVOICE</b> #10001: 03/27/2018	200.00	0.00
03/27/18	Submitted	<b>INVOICE</b> #10000: 03/27/2018	100.00	100.00
03/27/18	Used	<b>AUTHORIZA.</b> #06876512 from Additional Payer (Other)	0.00	0.00

# Support Resources



Your Agency's  
System  
Administrator



Access the  
User Guide



Submit a  
Support Ticket



Contact your  
Customer  
Success Manager



Submit an Idea

# Support Resources

