



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

SUPERVISOR USER TRAINING

Welcome to extendedReach!

Agenda



Accessing extendedReach



System Structure & Navigation



Getting Started



Support Resources



What is extendedReach?

- Foster care and residential software for child placement agencies to track child and home information, contacts, documents, etc.
- Web-based
 - Works with Macs/PCs/Tablets
 - Access all your work in one place using a web browser
- Eliminates duplicate data entry
 - Information is entered one time and repurposed throughout the database
- Compliance and due date tracking

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

The screenshot displays a software interface with a tabbed menu at the top: General, Referral, Health, Compliance (selected), People, Case File, Treatment, Financial, and Comments. The main content area is divided into three sections: Admission, Foster Home Records, and Casework. Each section contains a list of activities with color-coded status indicators (yellow, red, green) and due dates. The 'Admission' section lists: Admission Assessment (FIELDDED) (yellow, due soon 01/28/2021), Admission Interview (red, Add Activity), Client Rights (red, due on 01/13/2021), Consent to Treatment (WF) (yellow, due soon 01/28/2021), Drivers License (red, Add Report), Initial Service Plan (WEBDOC) (green, due on 02/12/2021), and Initial Service Plan (WORD) (green, due on 02/12/2021). The 'Foster Home Records' section lists: Foster Home Visit (Web Form) (yellow, due soon 02/01/2021), Foster Parent Placement Agreement (red, due on 01/20/2021), and Foster Parent Progress Note (WF) (red, due on 01/18/2021). The 'Casework' section lists: Case Conference (green, due on 02/13/2021) and Case Contact Note (WF) (red, Add Report). A link 'Show 24 hidden, optional items.' is visible in the top right of the Foster Home Records section.

Section	Activity	Status	Action	Due Date
Admission	Admission Assessment (FIELDDED)	Yellow		Due soon 01/28/2021
	Admission Interview	Red	Add Activity	
	Client Rights	Red		Due on 01/13/2021
	Consent to Treatment (WF)	Yellow		Due soon 01/28/2021
	Drivers License	Red	Add Report	
	Initial Service Plan (WEBDOC)	Green		Due on 02/12/2021
	Initial Service Plan (WORD)	Green		Due on 02/12/2021
Foster Home Records	Foster Home Visit (Web Form)	Yellow		Due soon 02/01/2021
	Foster Parent Placement Agreement	Red		Due on 01/20/2021
	Foster Parent Progress Note (WF)	Red		Due on 01/18/2021
Casework	Case Conference	Green		Due on 02/13/2021
	Case Contact Note (WF)	Red	Add Report	

Accessing extendedReach

- <https://login.extendedReach.com>
- Welcome email from alerts@extendedreach.com
- Temporary password – prompted to reset password upon first login

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: bodenweller@kaleidacare.com

Please contact your system administrator to obtain your temporary password.



The screenshot shows the extendedReach login interface. At the top left is a folder icon with a user icon inside. The title 'extendedReach' is at the top right. Below the title, the text 'Please identify yourself:' is followed by two input fields: 'E-Mail:' and 'Password:'. Below these fields is a 'Sign In' button. At the bottom, there is a red-bordered box containing the link 'Forgot your password?'. The footer at the bottom left reads '© 2022 extendedReach'.

System Structure

Cases

- Clients in Care
- Each client is a single case
- Each sibling is a separate case; Siblings can be linked
- If a client discharges and re-enters or changes programs creates each as a unique case which is linked (first name, last name and DOB or SSN)

Placements

- Links a Case to a Home or Facility

Homes

- Foster
- Adoptive
- Group
- Residential
- Inquiries



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, daily shift documentation
 - Homes – medicals on foster family members, home visits, training

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
 - Homes/Facilities – home study, licensing documentation, environmental checks



Getting Started – Features

- Consolidated Files
 - Client Case File – Go to one record to add/upload/view all documents, add/change placements, etc. for one client
 - Home File – Go to one record to add/upload/view all documents;
 - Foster Home File – one file to access the home, foster parent and family member information
- Personalized Workspaces
- Scanner Inbox
- Agency Address Book
- Shared Forms & Files
- Email Alerts

Workspace – RES Direct Care Staff

- Cases by Home
 - Click Case Name to go to the case record
 - Click Facility Name to go to the facility record
- My Recent Actions
- My Summary
 - Daily Activity Summary – Case & Home
- My Tasks - Reminders
- Summaries > Resources –
 - Address Book
 - Shared Forms & Files

The screenshot shows the Kaleidacare RES workspace interface. At the top, it says "you are here: My Workspace". The left sidebar contains a "My Stuff" menu with links to "My Workspace", "My Tasks", "Summaries", and "Resources". Below this is a search bar with a "Go" button and a dropdown menu for "Case Last Name". The main content area has a "Help" dropdown. The "Cases by Home" section displays a table with "Name" and "Placements" columns. The "My Recent Activities" section shows a table with "Date", "Case/Home", "Type", and "Status" columns. The "My Summary" section shows "Late Tasks: 0" and links to "Case Daily Activity Summary" and "Home Daily Activity Summary". The "My Tasks" section shows "No pending tasks exist for this worker." and links to "all" and "iCal".

Kaleidacare RES

you are here: **My Workspace**

My Stuff

- My Workspace
- My Tasks
- Summaries**
- Resources

Search... **Go**

Case Last Name ▼

Cases by Home

Name	Placements
Green Meadows Cottage	Broflovski, Ike Cooper, Sheldon Stark, Tony Warner, Blair

My Recent Activities

Date	Case/Home	Type	Status
07/26	Stark, Tony	Dly Prgrss Nt(AM)	Completed
07/26	Warner, Blair	Dly Prgrss Nt(AM)	Completed

My Summary

Late Tasks: **0**

Case Daily Activity Summary
Home Daily Activity Summary

My Tasks [all](#) » - [iCal](#)

No pending tasks exist for this worker.

Workspace – RES Case Manager

- Residential Cases – assigned cases (caseload)
- Active Referrals
- Inbox
- My Recent Actions
- My Summary –
 - Late Tasks
 - Incidents
 - Daily Activity Summaries
 - My Tasks – Reminders

The screenshot displays the Kaleidacare RES Case Manager Workspace. The interface is divided into a left sidebar and a main content area.

Left Sidebar:

- My Stuff:** My Workspace, My Tasks
- Cases:** Case Rosters, Case Tasks
- Homes:** Home Rosters, Home Tasks
- Summaries:** Staff, Resources
- Search... (Go button)
- Case Last Name (dropdown)

Main Content Area:

Kaleidacare RES
you are here: **My Workspace**

My Residential Cases details »

Name	Prog.	Placement
Broflovski, Ike	RES	Green Meadows Cottage
Cooper, Sheldon	RES	Green Meadows Cottage
Stark, Tony	RES	Green Meadows Cottage
Warner, Blair	RES	Green Meadows Cottage

²=Secondary Worker

Active Referrals

Date	Prog.	Status	Name
No pending referrals.			

Inbox How does this work?

Date	Attachments
Inbox: Case Manager Training	
07/26/2021 09:18 AM	Consent for Psychotropic Meds.pdf Grade Card.pdf IER.pdf » File attachments separately

My Recent Activities

Date	Case/Home	Type	Status
07/26	Broflovski, Ike	Dly Prgrss Nt(ON)	Completed

My Summary

Open Residential Cases: 4
Late Tasks: **101**
Incidents last 3 Days: 0

Case Daily Activity Summary
Home Daily Activity Summary

My Tasks all » · iCal

Overdue

Daily Progress Note (AM) for Stark, Tony	07/25/2021
--	------------

Show overdue (last 50)

Later (next 45 days)

Property-Clothing Inve.. for Broflovski, Ike	09/01/2021
--	------------

Workspace – Foster Care Case Manager

- My Foster Care Cases – assigned cases (caseload)
- My Households (Foster Homes)
- Home Submissions (from Foster Family Web portal)
- Inbox
- My Recent Actions
- My Summary –
 - Late Tasks
 - Incidents
 - Daily Activity Summaries
 - My Tasks – Reminders

The screenshot displays the 'Enchanted Family Services' workspace. The left sidebar contains navigation links: 'My Stuff' (My Workspace, My Tasks), 'Cases' (Case Rosters, Case Tasks), 'Homes' (Home Rosters, Home Tasks), 'HomeMatch™', 'Summaries', and 'Resources'. A search bar and a dropdown for 'Case Last Name' are also present. The main content area is divided into several sections:

- My Foster Care Cases** (details »): A table showing assigned cases.

Name	Prog.	Placement	Visited
Bellamy, Tink	FC	Crawley	07/26
Manson, Merida	FC	Ricardo	
Mills, Henry	FC	No Placement	

²=Secondary Worker
- My Households** (details »): A table showing foster homes.

Name	Type	Placed
Crawley, Robert and.. ²	Foster Home	3 of 4
Smith, John and Jane ²	Foster Home	0
Winslow, Carl and Ha.. ²	Foster Home	2 of 2

*=On Hold **=Special Investigation ²=Secondary Home Developer
- Home Submissions**: A table for submissions awaiting review.

Date	From	Description
No items have been submitted and are awaiting your review.		
- Inbox** (How does this work?): A table for pending documents.

Date	Attachments
No pending inbox documents.	
- My Recent Activities**: A table showing recent actions.

Date	Case/Home	Type	Status
07/26	Bellamy, Tink	Mnthly Cs Sprvsn	Submitted
07/23	Bellamy, Tink	Medical Visit	Completed
- My Summary**: Open Foster Cases: 3, Late Tasks: 31.
- My Tasks** (all » · iCal):
 - Overdue**: Client Handbook Acknow.. for Bellamy, Tink (07/09/2021), Initial Service Plan for Bellamy, Tink (07/16/2021). Show overdue (31).
 - This Week**: Pet Vaccinations Expir.. for Crawley, Robert and .. (Saturday).
 - Next Week**: CANS for Bellamy, Tink (08/01/2021), Comprehensive Service .. for Bellamy, Tink (08/01/2021), Fire Inspection Expires for Crawley, Robert and .. (08/01/2021).
 - Later (next 45 days)**: Personal Belongings In.. for Mills, Henry (08/31/2021).

Supervisor Workspace

- Workers
- Active Referrals (optional)
- Awaiting Approvals
- My Recent Actions
- Program Information
- Home Information
- Side Menu
 - Cases
 - Homes
 - Summaries – reports
- Search



Enchanted Family Services

you are here: **My Workspace**

 Add Case  Add Home  Post Message to Homes  Help

My Stuff

- My Workspace
- My Tasks

Cases

- Case Rosters
- Case Tasks

Homes

- Home Rosters
- Home Tasks
- HomeMatch™

Summaries

- Dashboard
- Casework
- Demographics
- Intake
- Discharge
- Staff
- Resources





Workers

- Refresh -

Name	Cases	Homes	Late
Carlyle, Robert	0	3	0
Dallas, Josh	4	0	33
Morrison, Jennifer	3	1	16
O'Donoghue, Colin	3	0	7
Parilla, Lana	3	0	18
Supervisor, Ginnifer	0	2	0

Active Referrals

Date	Prog.	Status	Name
No pending referrals.			

Awaiting Approval (By You)

- Approve Selected -

☐	Submitted	Type	Worker	Client
☐	07/26 11:44 AM	MON	Dallas, J	Bellamy, Tink
☐	07/26 12:18 PM	MON	O'Donoghue, C	Pan, Peter

Program Info

- Across All Programs -

Open Foster Cases: 13
Total Clients: 13
Ant. Discharges within 30 Days: 0
Incidents last 3 Days: 0

Home Info

Licensed Homes: 6
Licensed Homes on Hold: 0
Special Investigations: 0
Applicants/Unlicensed Homes: 0
Ant. Approvals within 30 Days: 0

Open Homes: 6
Foster Home: 6

% Occupancy (# active licensed beds used)
Foster Home: 79% (11 of 14)

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		
Addl. 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 –
Customize with forms
needed for each agency role

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*

Shift Staff Documentation

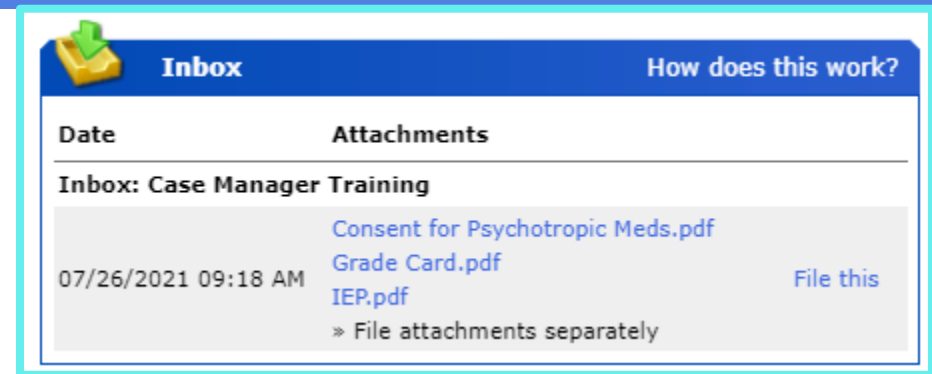
☒ Daily Progress Note (AM)	07/26/2021 :
☒ Daily Progress Note (ON)	07/26/2021 :
☒ Daily Progress Note (PM)	07/25/2021 :
☐ Incident Report (optional)	Add Report

Medications

☒ Medication Admin. Record - Meds 1-13 (Index 31)(Residential)	Add Report
--	------------

Scanner Inbox

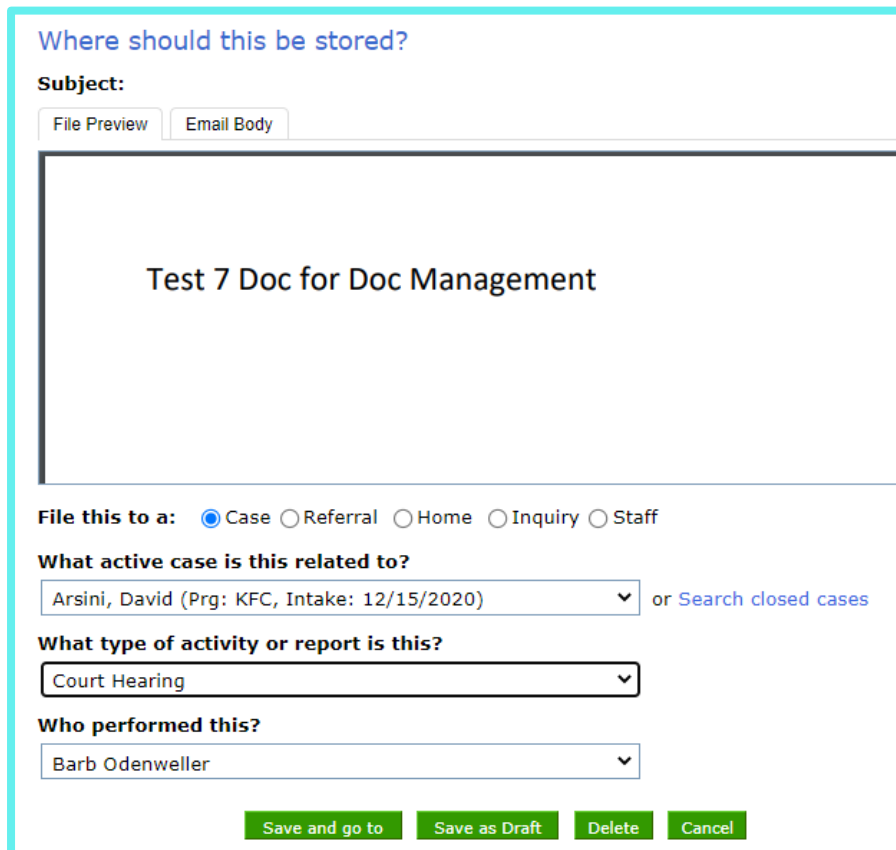
- Available with specific packages
- Agency controls which staff will see it on their workspace
- Inbox –
 - Scan and email documents with an email-capable scanner directly to your Scanner Inbox (do not BCC) using the email address associated with your Scanner Inbox
 - Easily find the email address by clicking “How does this work”.
 - Watch short video on workspace
 - File documents to case, home or staff file.



The screenshot shows the 'Inbox' section of a software interface. At the top, there is a yellow folder icon with a green plus sign, the word 'Inbox' in a blue header, and a link 'How does this work?'. Below the header is a table with two columns: 'Date' and 'Attachments'. The table contains one entry for an email received on 07/26/2021 at 09:18 AM. The attachments listed are 'Consent for Psychotropic Meds.pdf', 'Grade Card.pdf', and 'IEP.pdf'. A link 'File this' is visible to the right of the attachments. Below the table, a note says '» File attachments separately'.

Date	Attachments
07/26/2021 09:18 AM	Consent for Psychotropic Meds.pdf Grade Card.pdf IEP.pdf File this

» File attachments separately



The screenshot shows a form for managing a document. The title is 'Where should this be stored?'. Below the title is a 'Subject:' field with two tabs: 'File Preview' and 'Email Body'. The 'File Preview' tab is active, showing a document titled 'Test 7 Doc for Doc Management'. Below the preview, there are several fields for categorizing the document: 'File this to a:' with radio buttons for Case (selected), Referral, Home, Inquiry, and Staff; 'What active case is this related to?' with a dropdown menu showing 'Arsini, David (Prg: KFC, Intake: 12/15/2020)' and a link to 'Search closed cases'; 'What type of activity or report is this?' with a dropdown menu showing 'Court Hearing'; and 'Who performed this?' with a dropdown menu showing 'Barb Odenweller'. At the bottom, there are four buttons: 'Save and go to', 'Save as Draft', 'Delete', and 'Cancel'.

Where should this be stored?

Subject:

File Preview Email Body

Test 7 Doc for Doc Management

File this to a: ☒ Case ☐ Referral ☐ Home ☐ Inquiry ☐ Staff

What active case is this related to?

Arsini, David (Prg: KFC, Intake: 12/15/2020) or [Search closed cases](#)

What type of activity or report is this?

Court Hearing

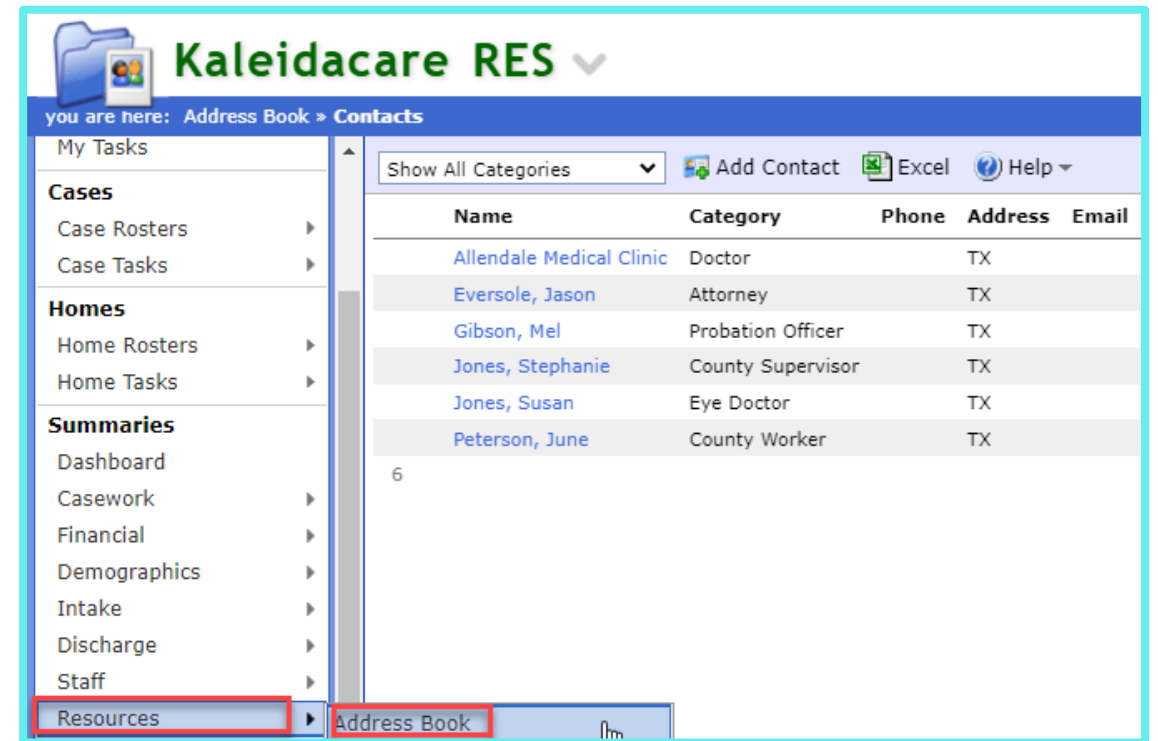
Who performed this?

Barb Odenweller

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 add to cases and home 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 and modification dates.

Total	Title	Description	File/Link(s)	Last Modified
2	Case Forms			
	Discipline Policy	-	- None -	07/26/2021 08:18 PM
	Monthly Recreation Schedule	-	- None -	07/26/2021 08:19 PM
2	Employee Forms			
	FMLA Forms	-	- None -	07/26/2021 08:18 PM
	PTO Request Form	-	- None -	07/26/2021 08:18 PM
1	Home Forms			
	Menus	-	- 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 homes.
 - “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		

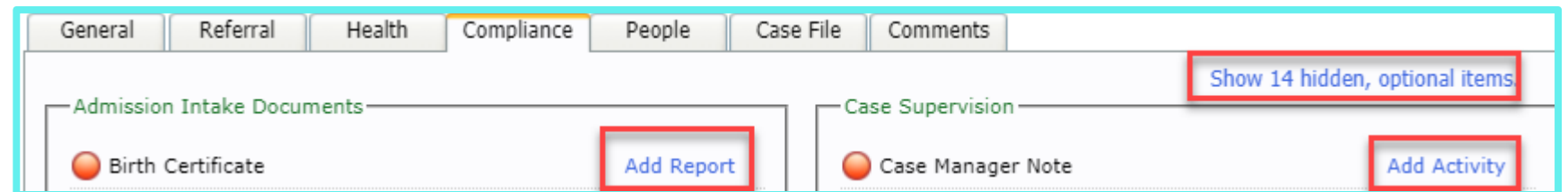
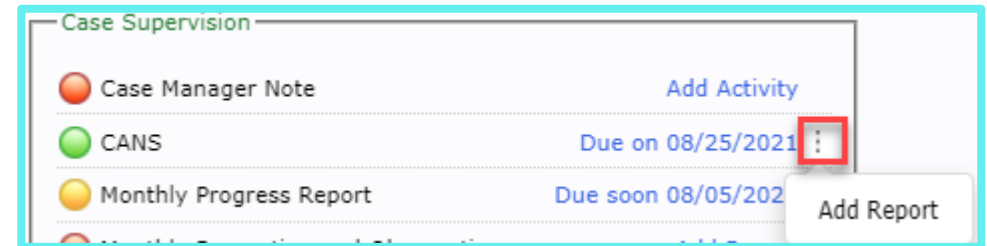
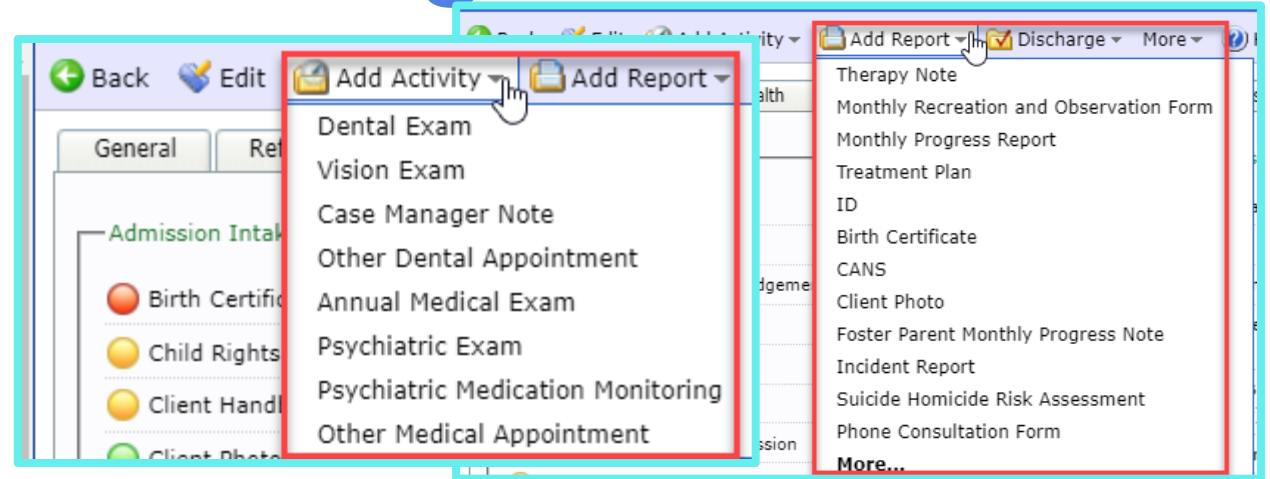
Additional Information

Date Plan Created/Revised
04/15/2021

Plan Details
test

Compliance 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



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

