



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

# BASIC 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

# Accessing extendedReach

- <https://login.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: [bodenweller@kaleidacare.com](mailto:bodenweller@kaleidacare.com)

Please contact your system administrator to obtain your temporary password.



## extendedReach

Please identify yourself:

E-Mail:

Password:

Sign In

[Forgot your password?](#)

# Compliance and Due Date Tracking

- Program rules are set, 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. A link 'Show 24 hidden, optional items.' is visible in the top right of the Foster Home Records section.

Section	Activity	Status	Due Date / Action
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
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

# 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 in Kcare – migrate each as a unique case which is linked (first name, last name and DOB or SSN)

## Placements

- Links a Case to a Home

## 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
- See related slides:
  - 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
  - Late Tasks
  - 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 "Kaleidacare RES" and "you are here: My Workspace". On the left, there is a sidebar with "My Stuff" containing 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. It features three main sections: "Cases by Home" with a table of cases, "My Recent Activities" with a table of recent actions, and "My Summary" with a summary of tasks and activity summaries. The "My Tasks" section shows "No pending tasks exist for this worker."

**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 – Case Manager or Therapist

- 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 workspace interface. The top navigation bar includes a 'you are here: My Workspace' breadcrumb and a 'Help' dropdown. The left sidebar contains a 'My Stuff' menu with links to 'My Workspace', 'My Tasks', 'Cases', 'Homes', and 'Summaries'. Below the menu is a search bar and a 'Case Last Name' dropdown. The main content area is divided into several sections:

- My Residential Cases details »**: A table listing assigned cases.
- My Summary**: A summary box showing 'Open Residential Cases: 4', 'Late Tasks: 101', and '# Incidents last 3 Days: 0'. It also includes links for 'Case Daily Activity Summary' and 'Home Daily Activity Summary'.
- Active Referrals**: A section indicating 'No pending referrals'.
- Inbox**: A section titled 'How does this work?' showing an email from 'Inbox: Case Manager Training' with attachments 'Consent for Psychotropic Meds.pdf', 'Grade Card.pdf', and 'IER.pdf'. A link 'File this' is provided.
- My Recent Activities**: A table showing recent actions.
- My Tasks all » · iCal**: A section showing 'Overdue' tasks, including 'Daily Progress Note (AM) for Stark, Tony' due on 07/25/2021 and 'Property-Clothing Inve.. for Broflovski, Ike' due on 09/01/2021. A link 'Show overdue (last 50)' is available.

**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

<sup>2</sup>=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

# 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 Worker:	- Not Specified -	TPR Ordered:	
Removal Date:	Unknown removal date	Perm. Plan Goal:	Reunification
Admission Date:	12/15/2020	Anticipated 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



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Life-Threatening Allergy  
Dietary Issue(s)  
Psychotropic Meds  
Age: 16 yrs (7/15/05)  
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**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**


<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, home or staff file.

**Inbox**How does this work?

Date	Attachments
<b>Inbox: Case Manager Training</b>	
07/26/2021 09:18 AM	<a href="#">Consent for Psychotropic Meds.pdf</a> <a href="#">Grade Card.pdf</a> <a href="#">IEP.pdf</a> » File attachments separately

File this

Where should this be stored?

Subject:

File PreviewEmail 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

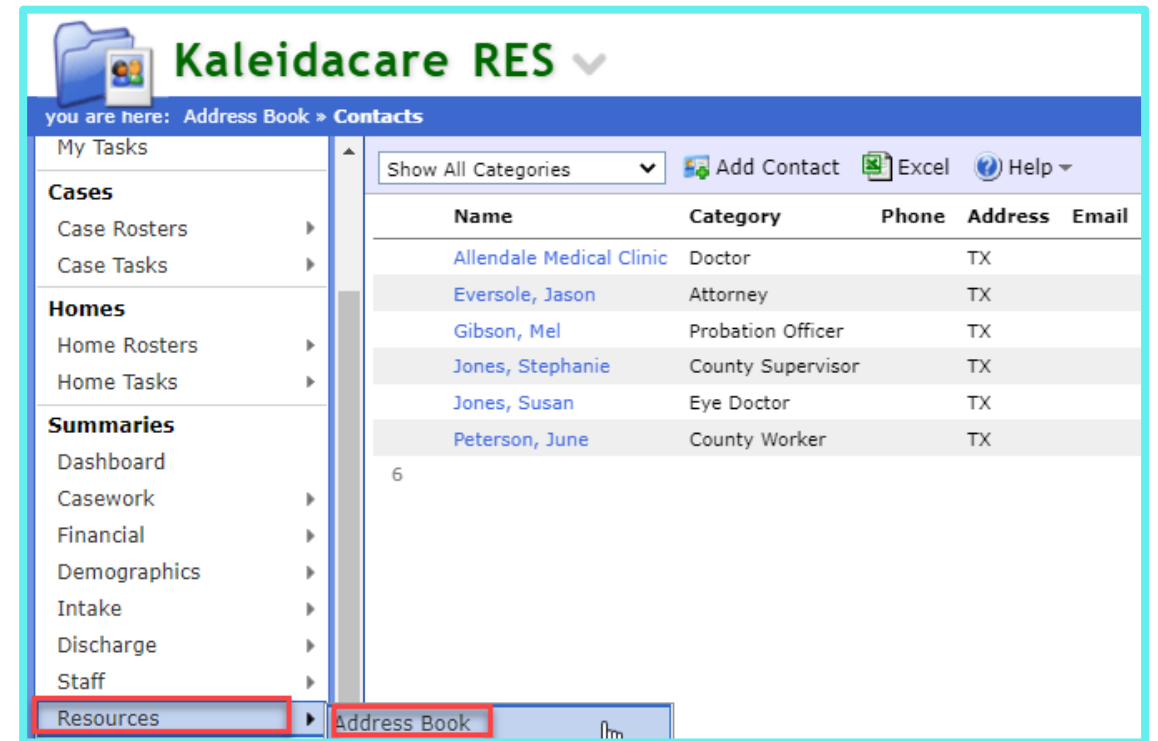
Who performed this?

Barb Odenweller

Save and go toSave as DraftDeleteCancel

# 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

**Kaleidacare RES**

you are here: Shared Forms + Files > By Title

My Tasks

**Cases**

- Case Rosters
- Case Tasks

**Homes**

- Home Rosters
- Home Tasks

**Summaries**

- Dashboard
- Casework
- Financial
- Demographics
- Intake
- Discharge
- Staff

**Resources**

- Address Book
- Shared Forms + Files

Add Shared File Excel Help

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

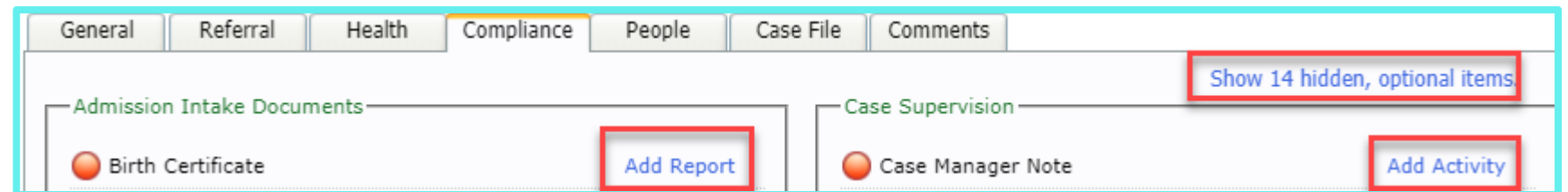
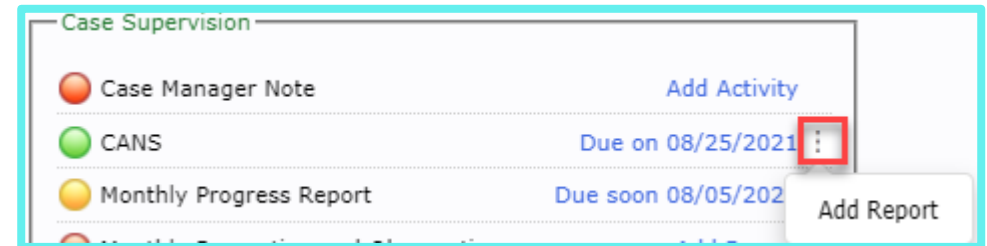
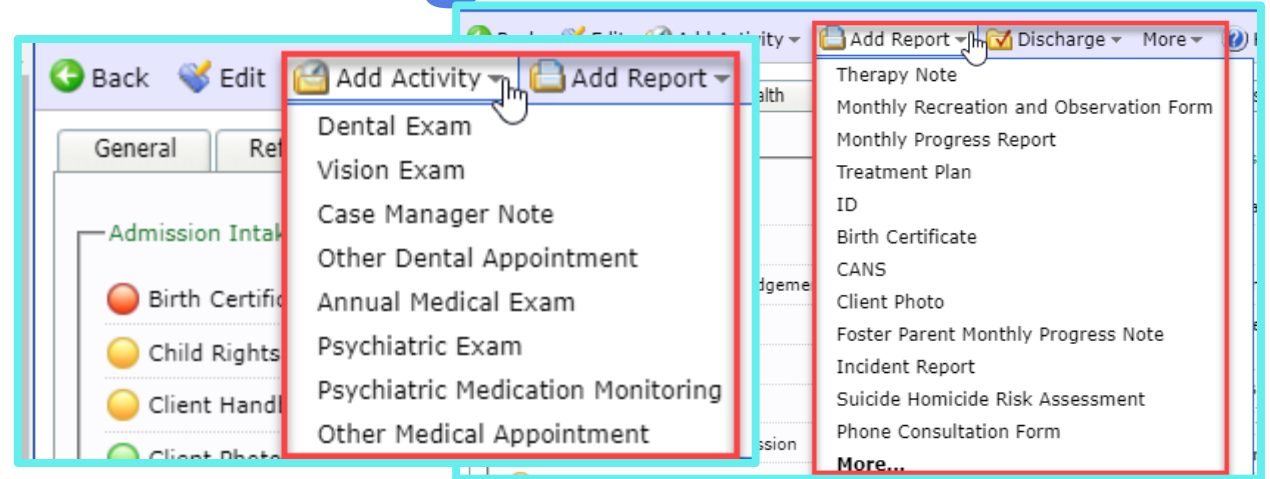
Additional Information

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





# Case Compliance Tab

- Links to facility on left side menu
- Buttons to add activities and reports, view print templates
- Colors for visual status of forms
- In process, due on and submission dates
- Hidden, optional forms link

The screenshot displays the 'Case Compliance Tab' for a client named Sheldon Cooper. The interface includes a left sidebar with client information and a main content area with various compliance sections. Red boxes highlight specific features: the 'Add Activity' and 'Add Report' buttons in the top navigation bar; the 'Show 17 hidden, optional items.' link in the top right; the 'Due on 12/20/2021' date for the 'Treatment Plan'; the 'Placed With' section showing 'Green Meadows Cottage'; and the 'Shift Staff Documentation' section with a red box around the 'Daily Progress Note' items.

**Case Information:** Sheldon Cooper, Kaleidacare RES. Age: 16 yrs (7/15/05), Sibling Group: 1, Stats: 455 days, 1 plcmnts...  
**Placed With:** Green Meadows Cottage (Residential), Placed On: 12/15/2020 (Residential).  
**Change Placement:** - Avail. Homes for Case -  
- Avail. Homes for Group -

**Compliance Sections:**

- Admission:** Cell Phone Contract (optional) 04/14/2021, Client Rights, Discharge Policy, Dress Code Policy, Grievance Procedures, Placement Agreement, Transportation Authorization. Each has an 'Add Report' link.
- Legal:** Birth Certificate, County Case Plan, Photo of Client (06/07/2021), Release of Information, Social Security Card. Each has an 'Add Report' link.
- Education:** Notice of School Enrollment. Has an 'Add Activity' link.
- Service Plan:** Treatment Plan. Due on 12/20/2021.
- Case Manager Documentation:** Caseworker Contact, Child-Family Team Meeting Notes, Group Note, Monthly Progress Report, Quarterly Progress Report. Each has an 'Add Activity' or 'Add Report' link.
- Shift Staff Documentation:** Daily Progress Note (AM) 09/28/2021, Daily Progress Note (ON) 09/27/2021, Daily Progress Note (PM) 09/27/2021, Incident Report (optional) In proc. 11/04/2021.
- Therapist Documentation:** CANS. Has an 'Add Report' link.

# Home Compliance Tab

- Links to cases placed in the facility on left side menu
- Buttons to add activities and reports
- Colors for visual status of forms
- Expiration, submission, due on dates

The screenshot displays the Kaleidacare RES web application interface. The top navigation bar includes a folder icon, the text "Kaleidacare RES", and a dropdown arrow. Below this, a breadcrumb trail reads "you are here: My Workspace > Green Meadows Cottage". The right side of the header shows "User: B".

The main interface is divided into a left sidebar and a central content area. The sidebar contains a "Home" section with a "Green Meadows Cottage Residential" link, and a "Placements" section with a list of names: Broflovski, Ike; Cooper, Sheldon; Stark, Tony; and Warner, Blair. Below the placements is a "Last Modified" timestamp and a "Created" timestamp.

The central content area features a "Compliance" tab, which is highlighted. The tab contains four sections: "Facility Vehicles", "Facility Monitoring", "Facility Nutrition", and "Facility Safety". Each section lists various forms with their status (indicated by a green or red circle) and their expiration or submission date. The "Facility Monitoring" section includes a "Submitted 03/11/2022" status for the "Work Order (optional)" form.

Red boxes highlight specific elements: the "Add Activity" and "Add Report" buttons in the top navigation bar; the "Placements" section in the sidebar; the "Vehicle Inspection (2016 Dodge Caravan)" form in the "Facility Vehicles" section; the "Bed Check Log" form in the "Facility Monitoring" section; and the "Submitted 03/11/2022" status for the "Work Order (optional)" form.

Section	Form Name	Status	Expiration / Submission Date
Facility Vehicles	Vehicle Inspection (2016 Dodge Caravan)	Green	07/21/2021
	Vehicle Insurance (2016 Dodge Caravan)	Green	Expires 02/04/2023
	Vehicle Maintenance Form	Green	09/28/2021
Facility Monitoring	Bed Check Log	Green	08/25/2021
	Communication Log	Green	02/11/2021
	Facility Group Note	Red	Add Report
	Work Order (optional)	Red	Submitted 03/11/2022
Facility Nutrition	Menu	Green	09/26/2021
	Refrigerator-Freezer Temperature Log	Green	09/03/2021
Facility Safety	Facility Incident Report (optional)	Green	03/03/2022
	Facility Safety Checklist	Green	09/13/2021
	Fire Drill	Red	Due on 10/31/2021
	Fire Extinguisher Inspection	Green	Expires 09/08/2022
	Health Inspection	Green	Expires 08/20/2022

# 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

