BASIC USER TRAINING

Welcome to extendedReach!

Agenda

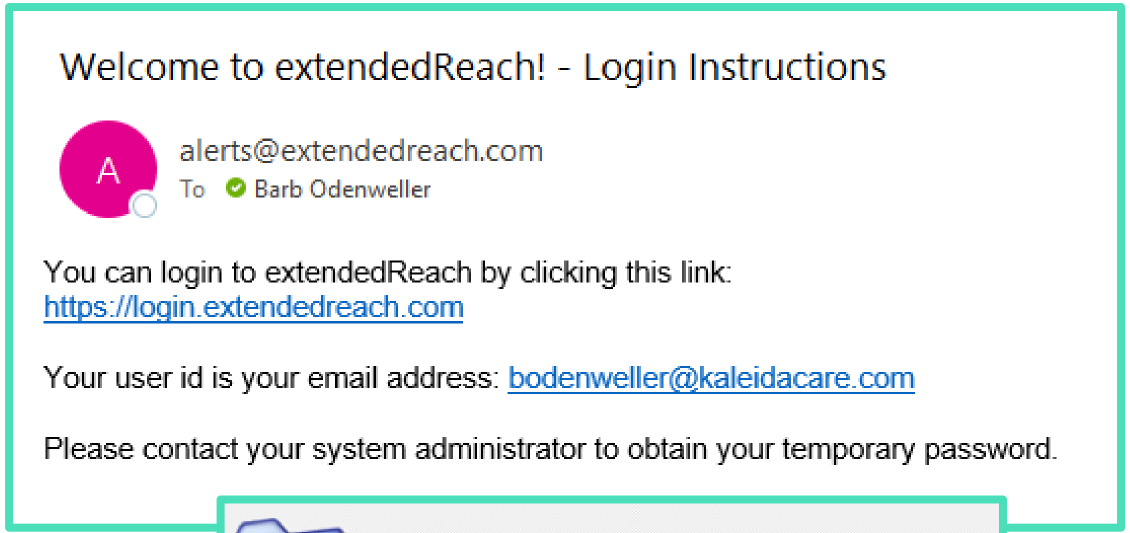
- Accessing extendedReach
- System Structure & Navigation
- Getting Started
- Support Resources

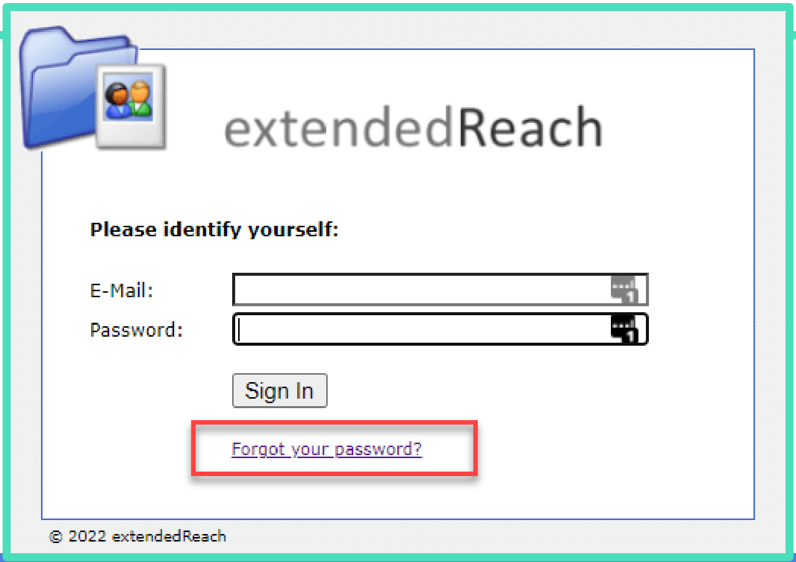
What is extendedReach?

- 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

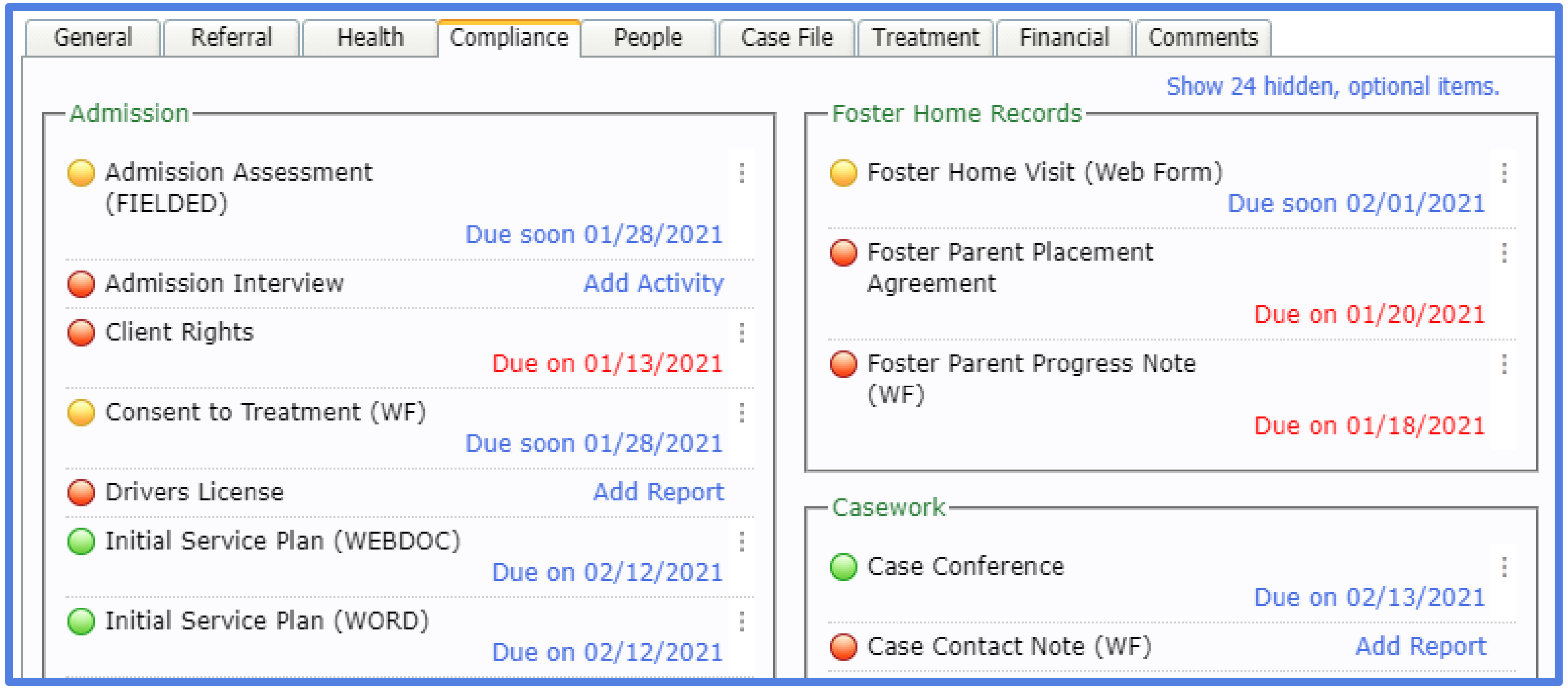
- https://login.extendedReach.com
- Welcome email from alerts@extendedreach.com
- Temporary password - prompted to reset password upon first login
- If forget password, use link on login page that will send email with your password.





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



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

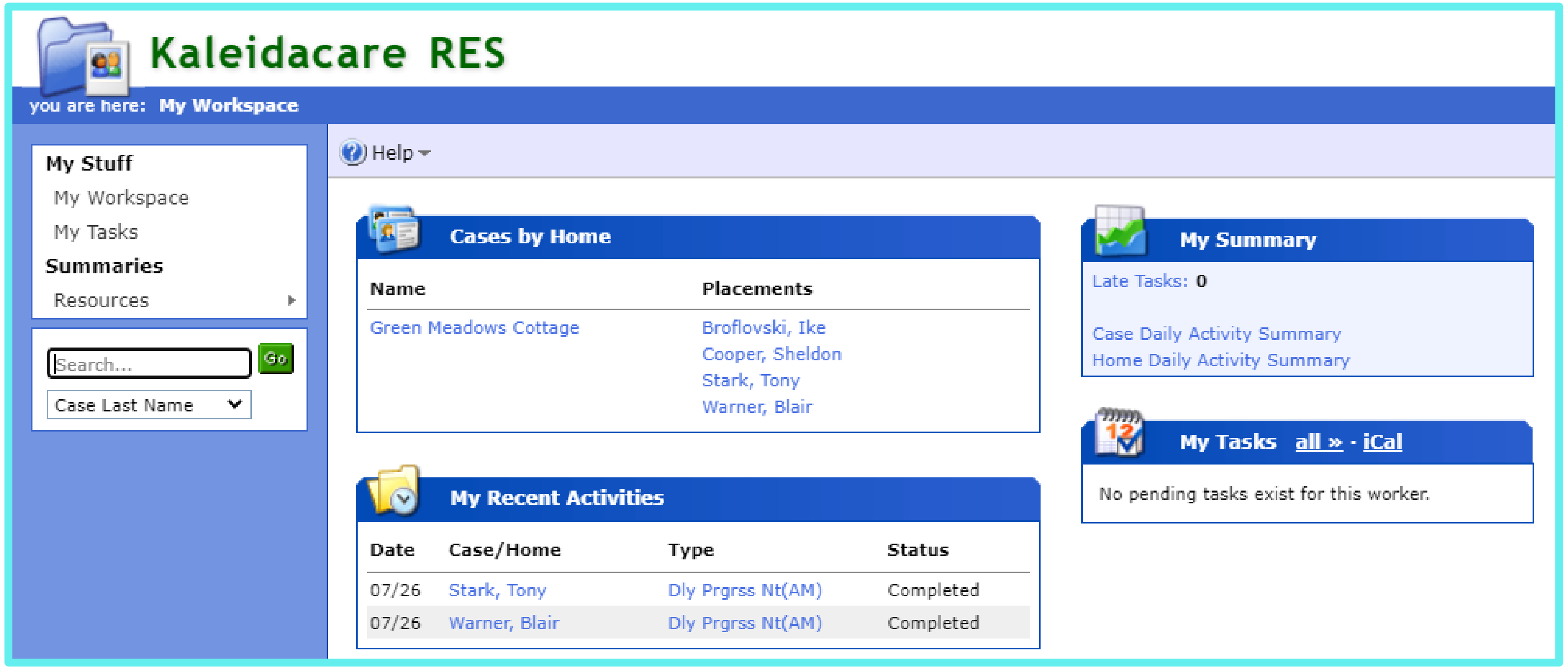
- Documents collected or written by staff, often with a due date and an associated file
  - Cases – assessments, treatment plans, incident reports, birth certificates, referring agency paperwork, school documentation
  - Homes/Facilities – home study, licensing documentation, environmental checks

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

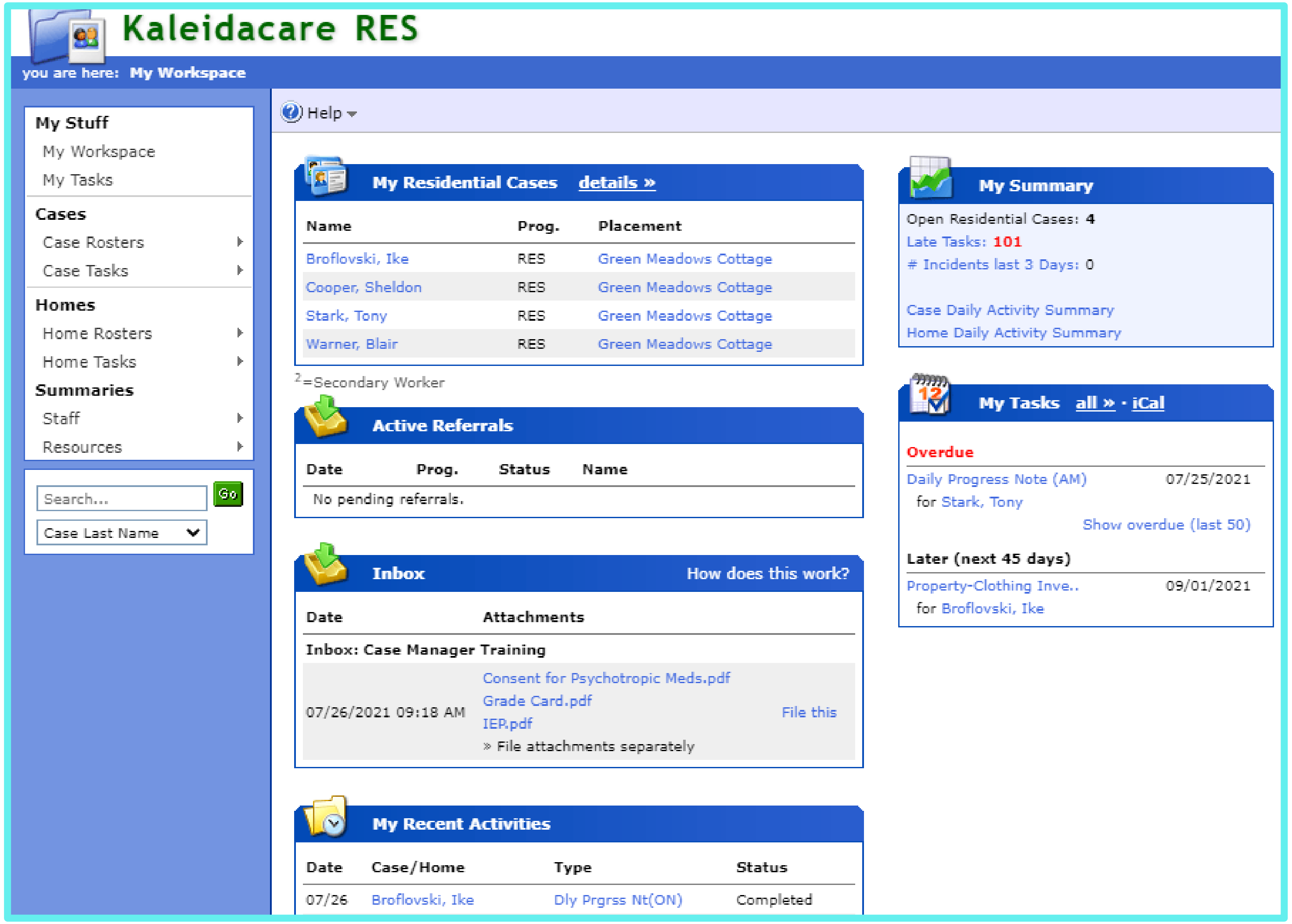
Workspace – RES Direct Care Staff

- 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

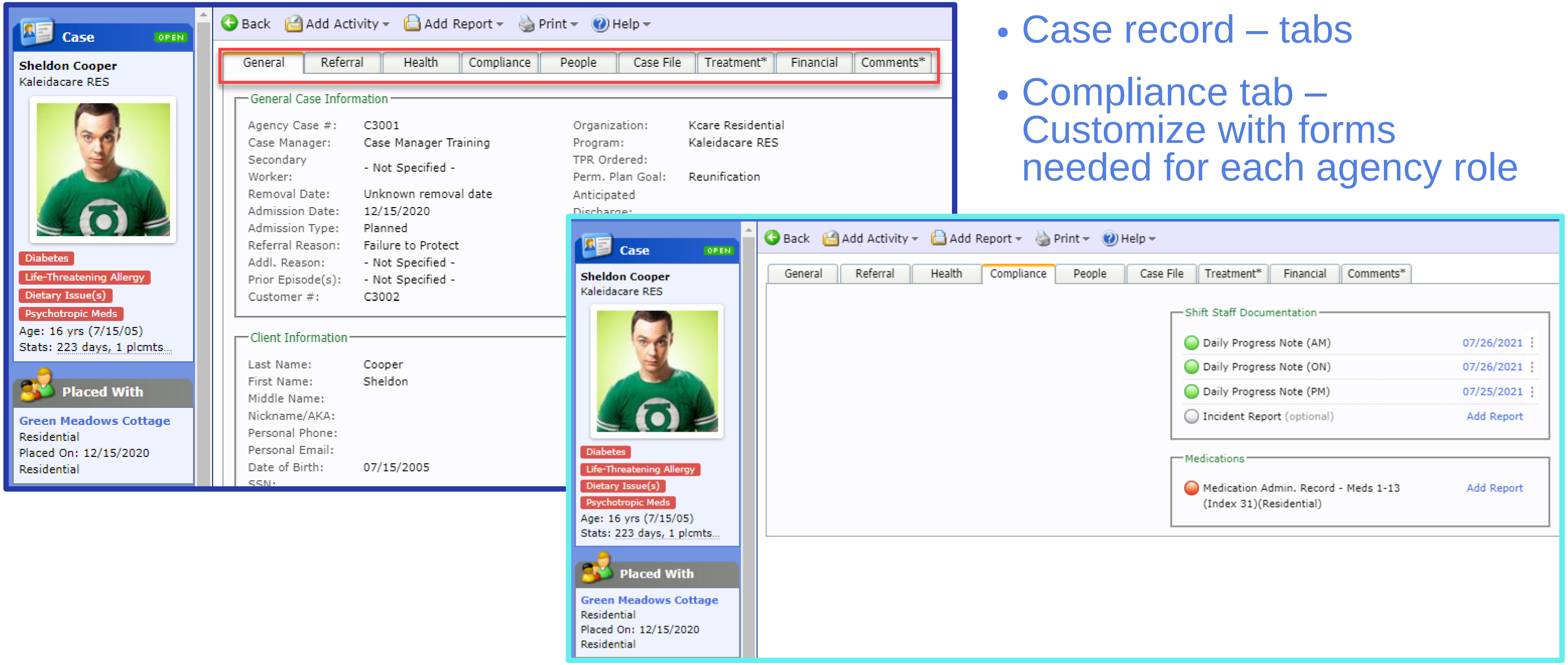


Workspace – Case Manager or Therapist

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



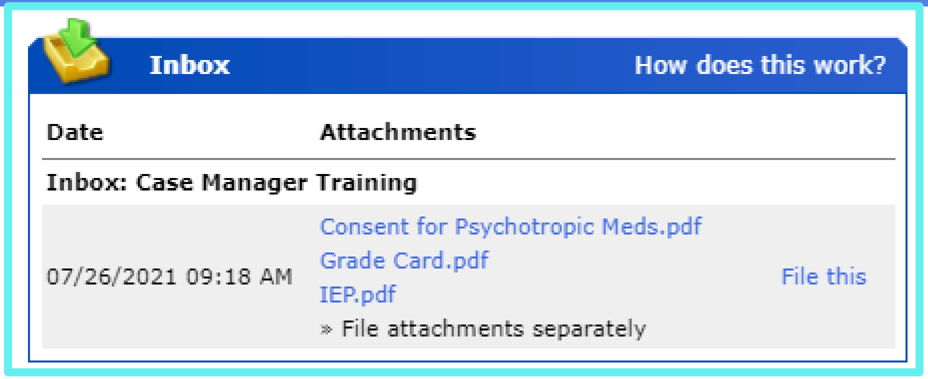
Consolidated Files

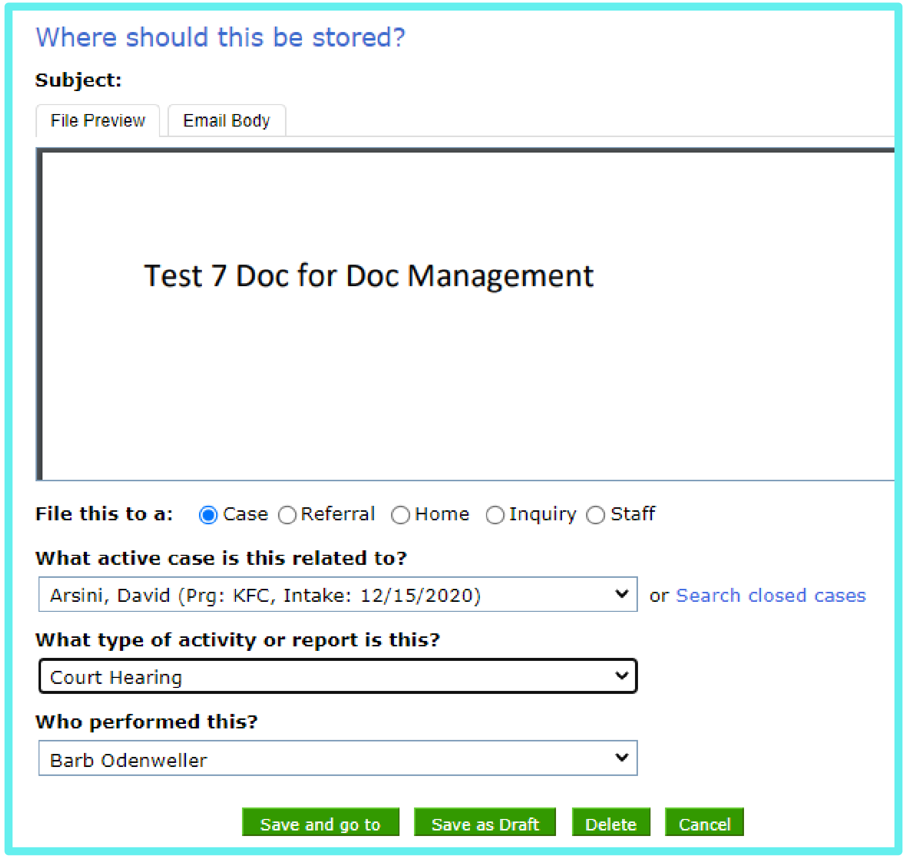


- Case record – tabs
- Compliance tab – Customize with forms needed for each agency role

Scanner Inbox

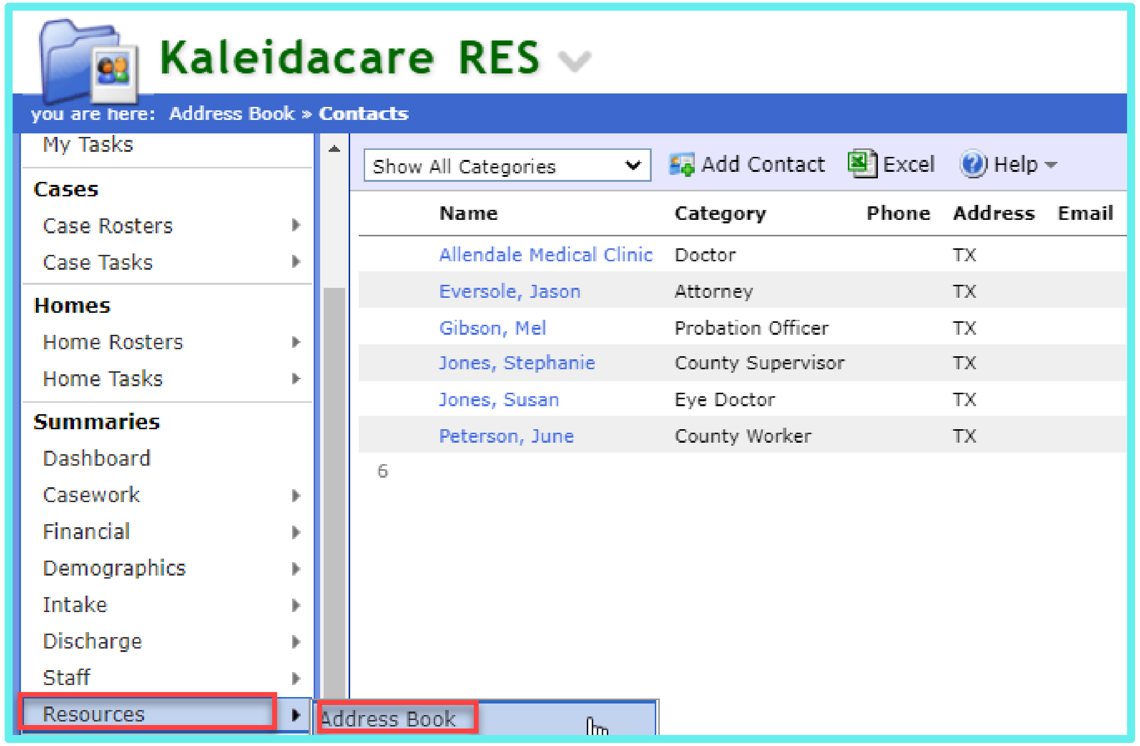
- Inbox –
  - Scan and email documents with an email-capable scanner directly to your Scanner Inbox (do not BCC) using the email address associated with your Scanner Inbox
  - Easily find the email address by clicking “How does this work”.
  - Watch short video on workspace
  - File documents to case,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

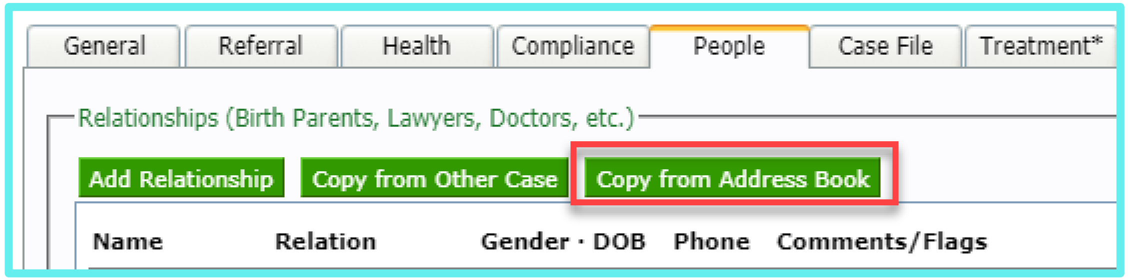




Agency Address Book

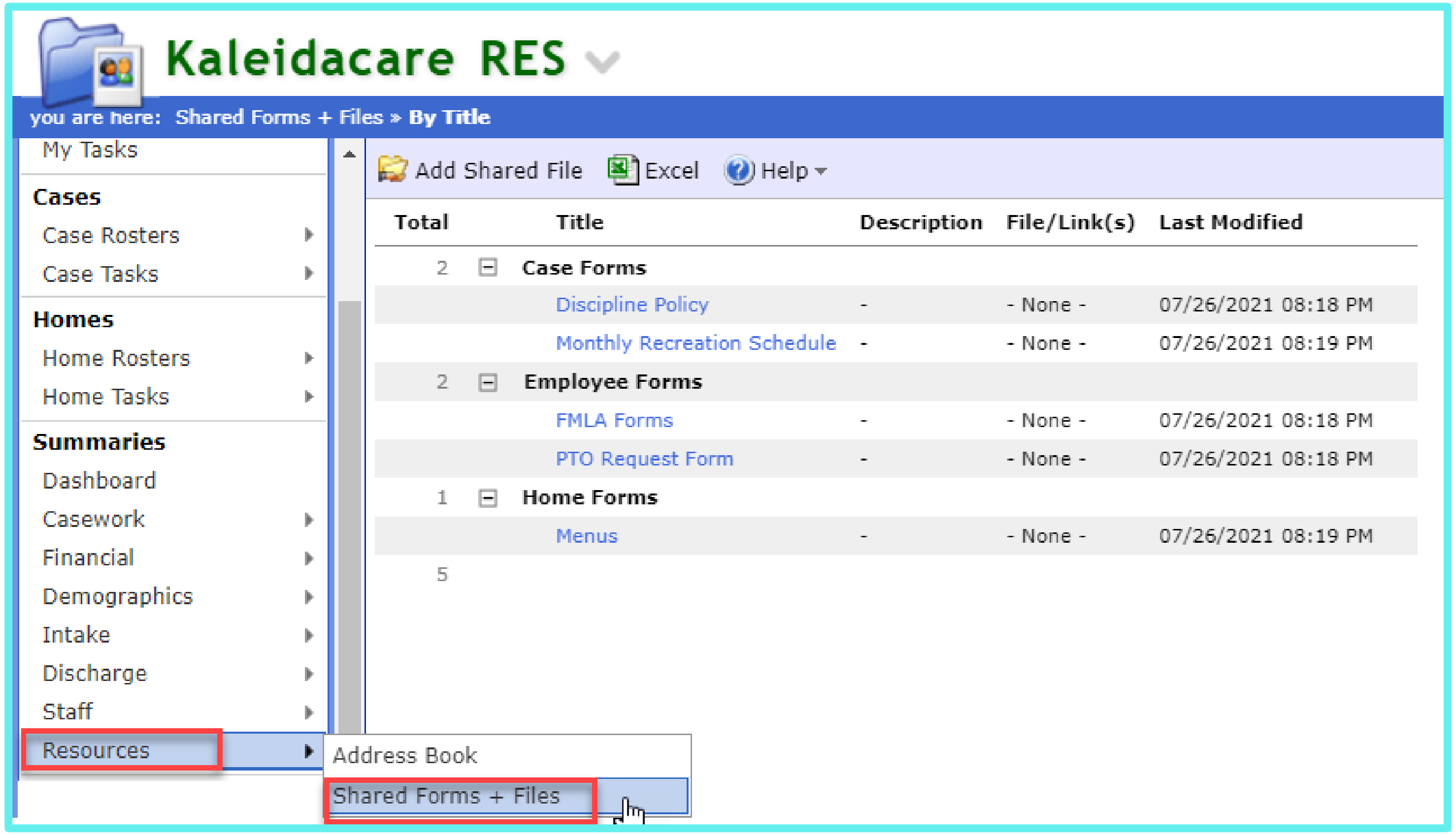
- Add clinical professionals, county/state workers, etc. to a central address book so can easily add to cases and home and have one record to update if contact information changes.
- This also allows staff to view all clients who are associated with a particular contact.





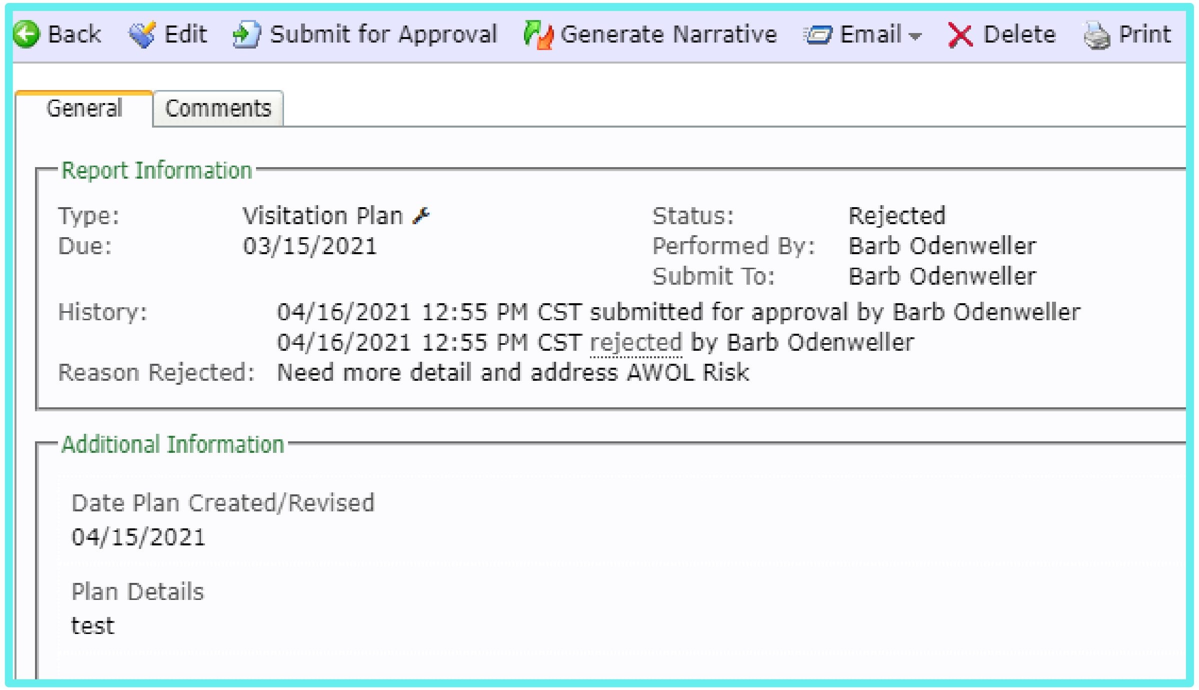
Shared Forms & Files

- 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



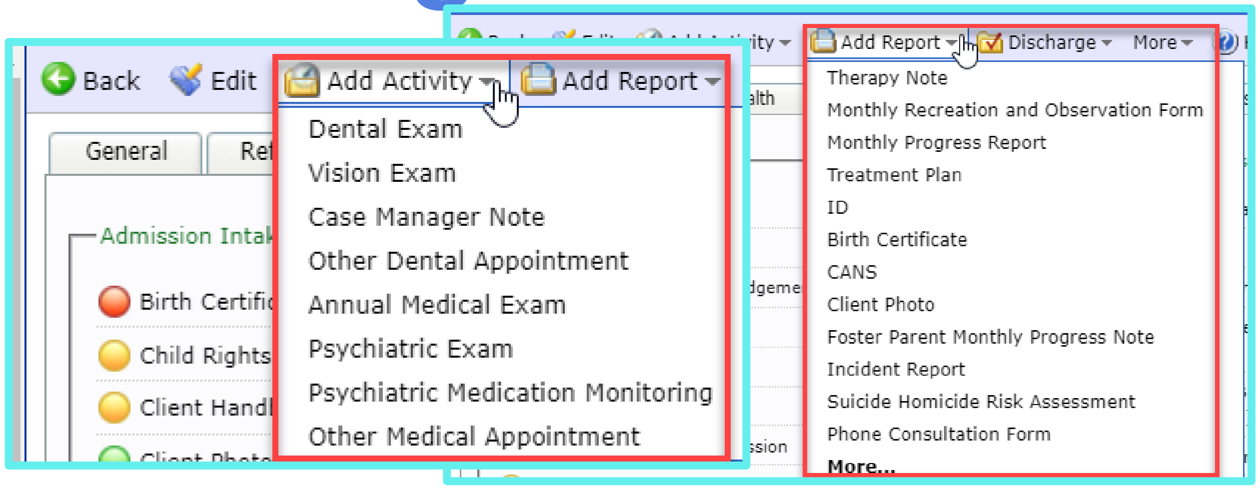
Email Alerts

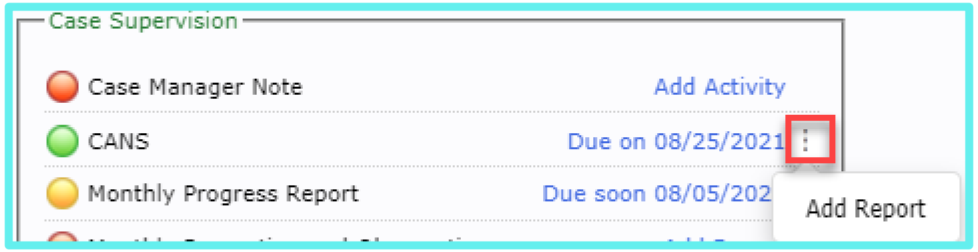
- Email Alerts are pre-planned email messages created within eR announcing either an “Action-Based” Event or a “Scheduled” Event within cases and homes.
  - “Action-Based” events include workflow related user actions, such as approvals, placements, discharges, Incidents, etc.
  - “Scheduled” events include 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).

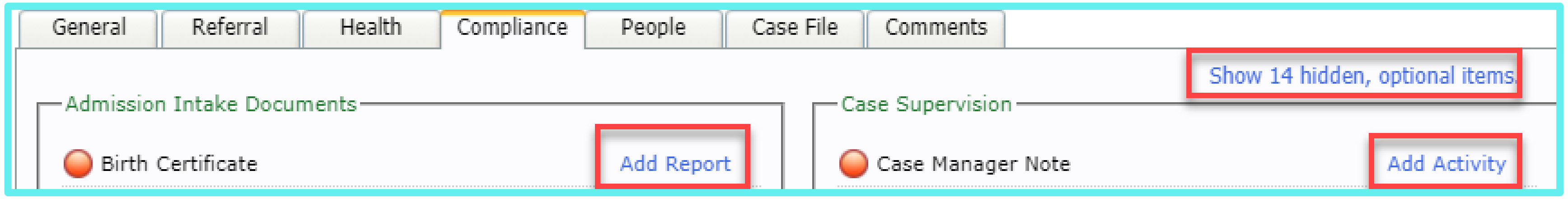


Compliance Tab – Adding Activities & Reports

- 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

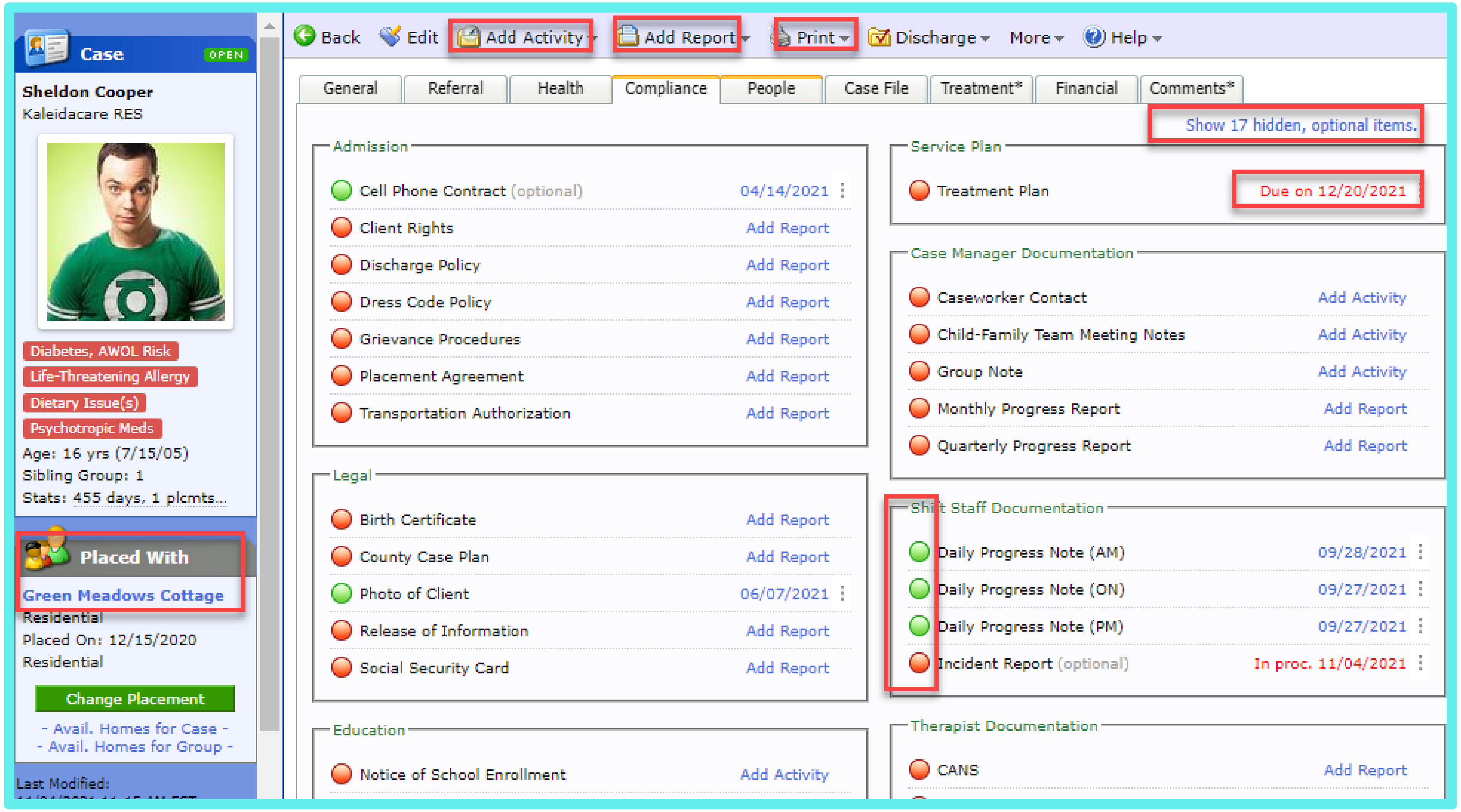






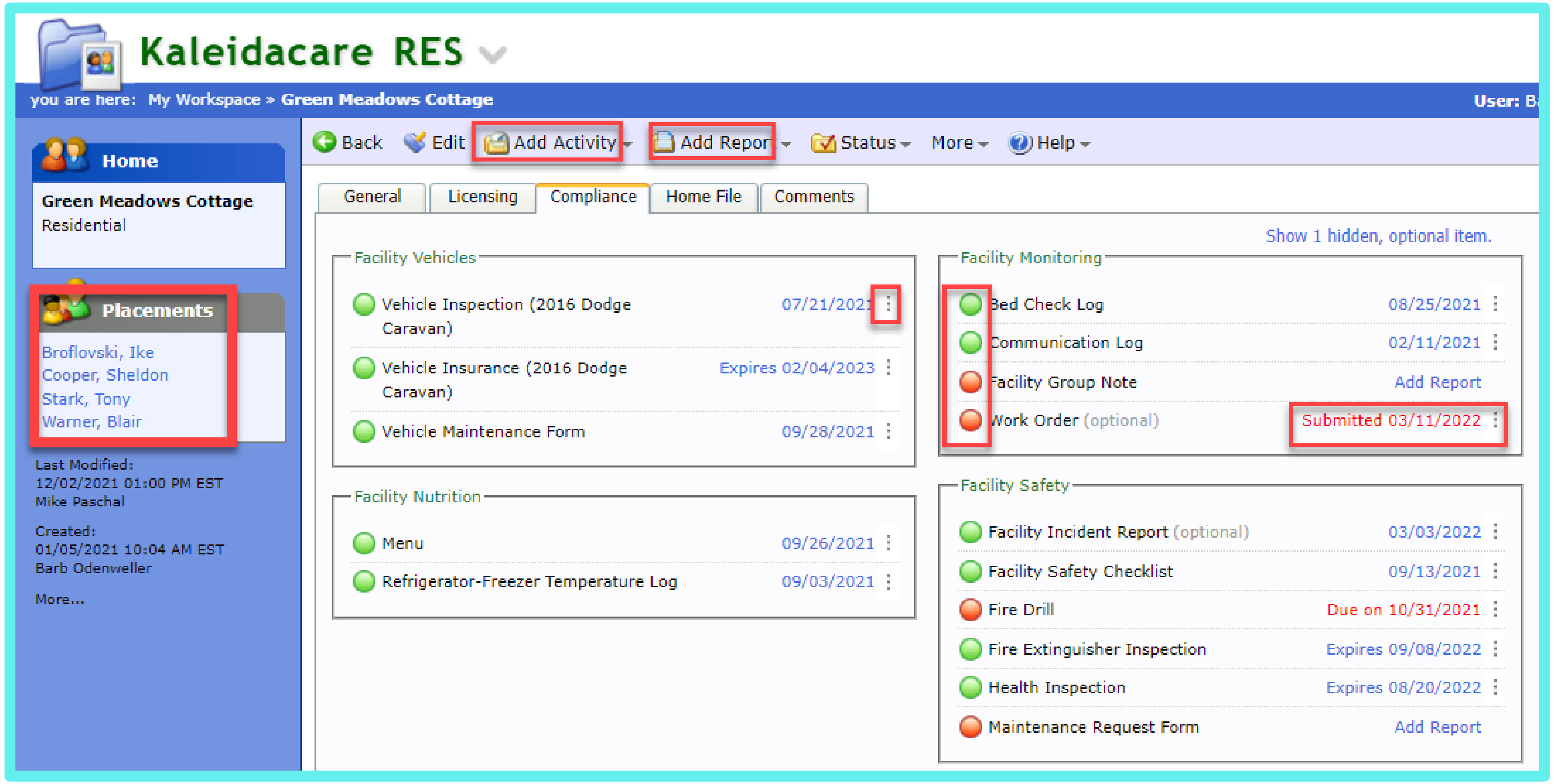
Case Compliance Tab

- 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



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



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