extendedReach
powered by kcare

STAFF MANAGEMENT

System Administrator Training

zoom practices

- Participants will be muted by default
- Questions? Submit using Zoom's Q&A function.
- Session will be recorded and available in the User Guide
- A link to request a training certificate is provided at the end of the evaluation

Agenda

- Adding a New User
- Uploading Signatures
- Staff Documents and Training
- User Management
- Support Resources

Overview

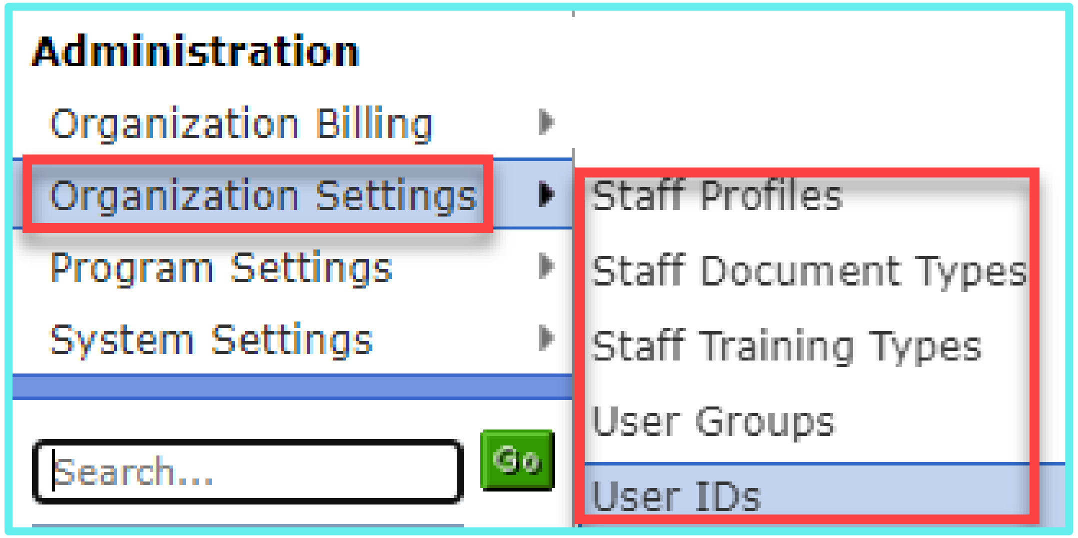
- User ID
  - Gives ability to login
  - Delete when user terminated
- Staff Profile
  - Staff Basic Information
  - Supervisor
  - Upload digital signature image
- Inbox (package specific)
  - Scan/email documents into system to file in case, home or staff file
- User Group
  - Group individuals to set permissions
  - Updates all individuals in group when permissions changed
- Staff Documents
  - Track compliance of staff documents
- Staff Training
  - Track staff training hours and set next due dates

User ID

- Accessing the extendedReach software system requires a User ID.
- This is the first step in adding a new hire to the system.
- An employee requires only a User ID if they need to access the system only.
- If an employee works with cases within the eR system, they also require a staff profile.
  - A Staff Profile displays employee name in staff fields – performed by (author of a document), submit for approval to, etc.

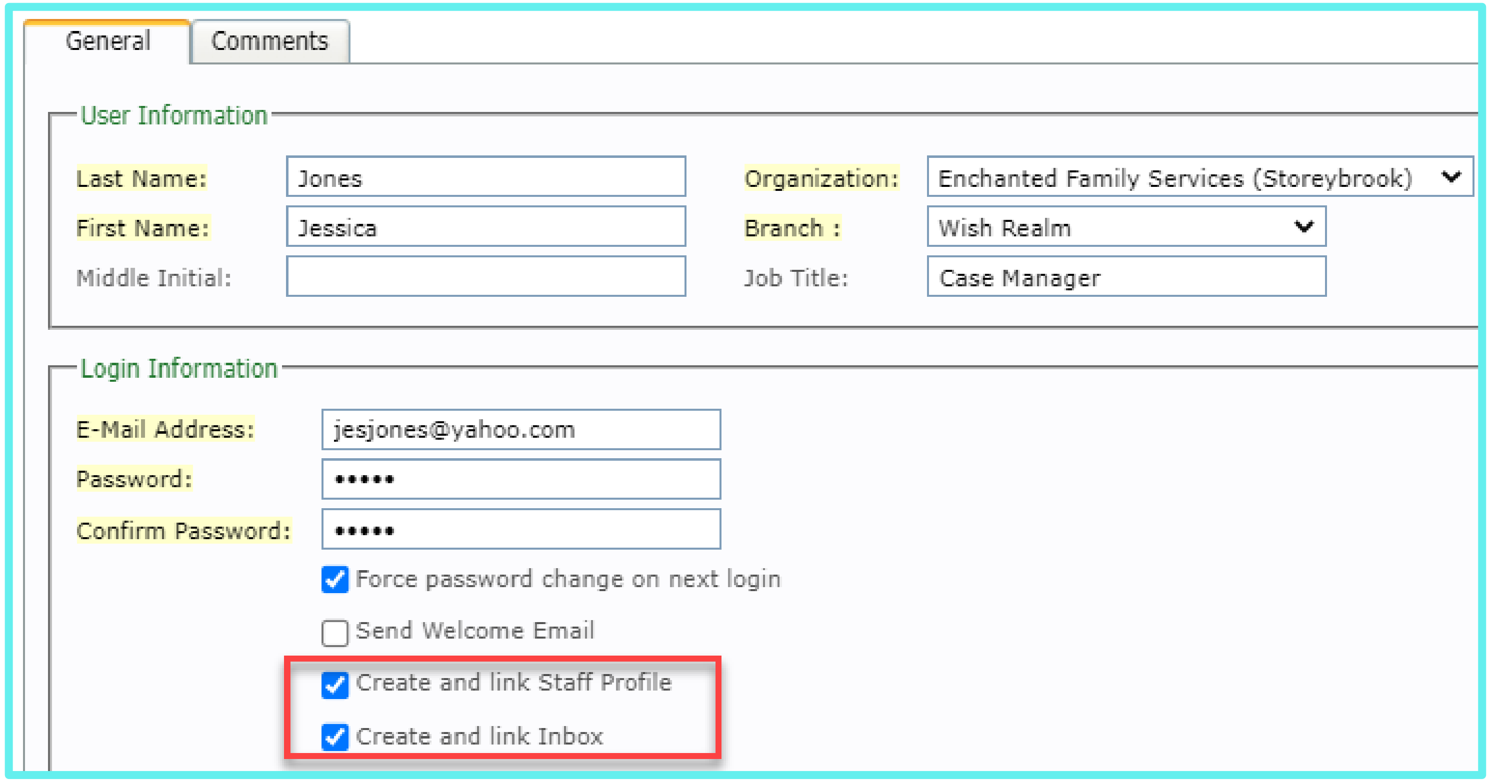
Add User ID

- Completed by Administrators
- Navigate to Administration > Organization Settings > User IDs
- Click Add User ID on top menu bar



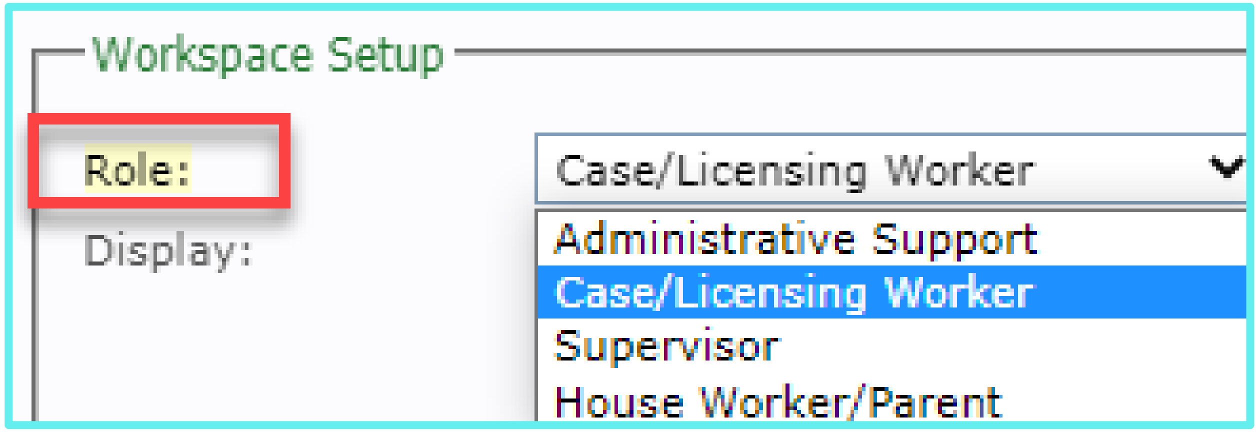
Add User ID

- User Information:
  - Name
  - Organization
  - Branch, if applicable
  - Job Title
- Login Information
  - E-mail Address (username)
  - Temporary Password – Force password change on next login
  - Send Welcome email
  - Create and link Staff Profile
  - Create and link Inbox



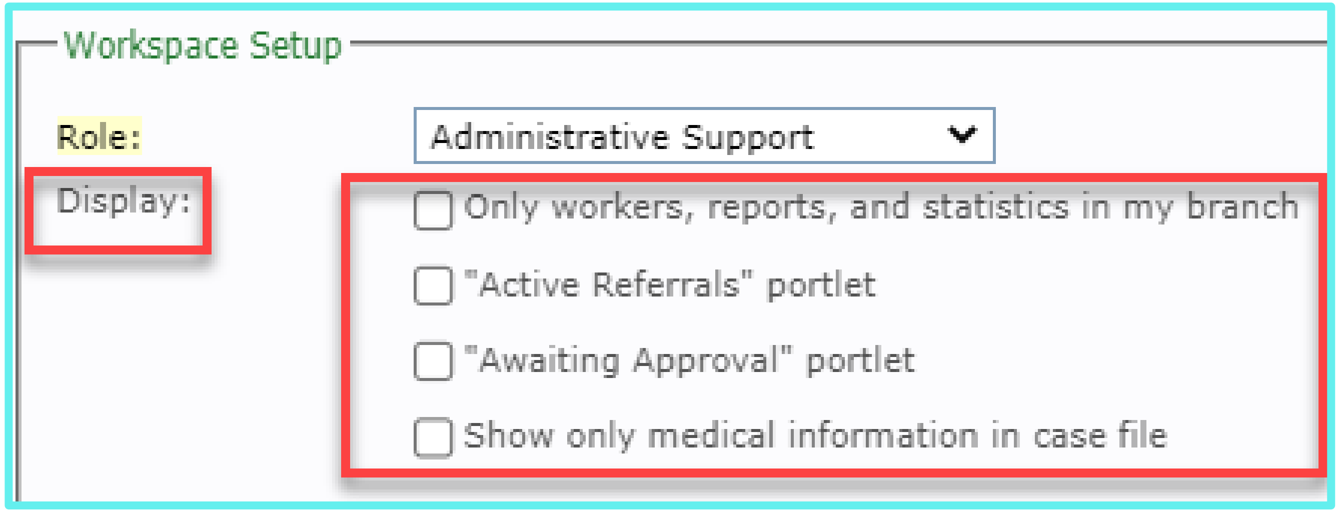
Workspace Setup

- Role Options (not configurable):
  - Administrative Support
  - Case/Licensing Worker
  - Supervisor
  - House Worker/Parent
- Display
  - Preferences to display on the user's workspace
  - Change based on Role selected



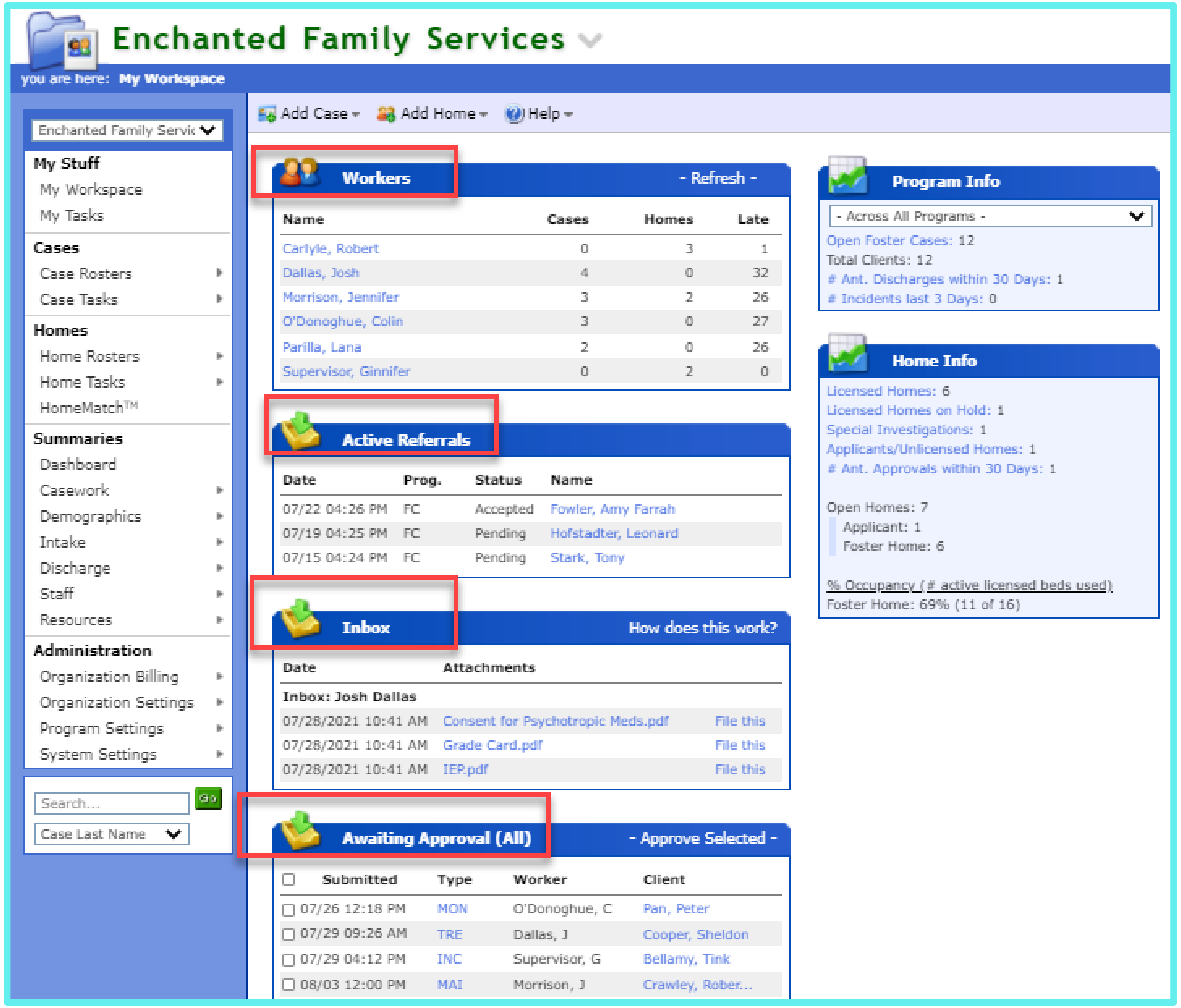
Administrative Support Workspace

- Only workers, reports and stats in my branch
- “Active Referrals” portlet
- “Awaiting Approval” portlet – Important for supervisors or staff that approve documents submitted by staff.
- Show only medical info in case file – option for medical subcontractors



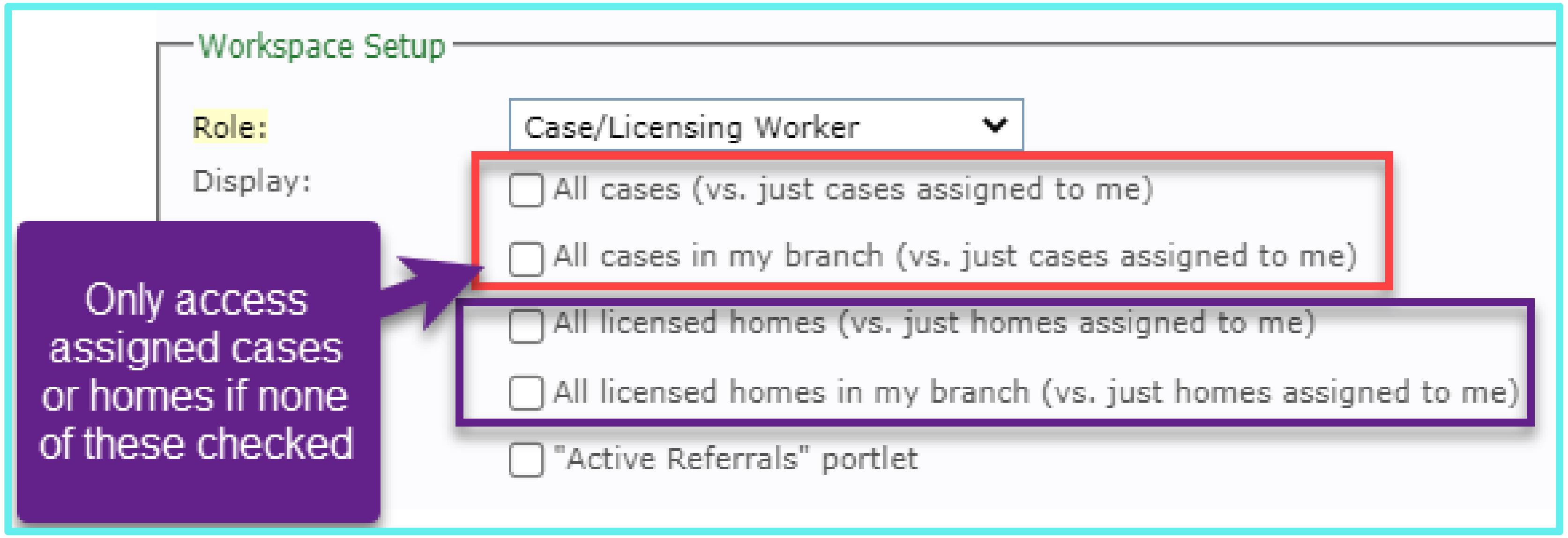
Workspace Views

- Portlets
  - Workers – click on worker's name to view their workspace screen
  - Active Referrals – access referrals to deny or move to placement
  - Inbox (Package Specific) – documents scanned or emailed using Inbox email to be filed
  - Awaiting Approvals – quick access to documents that require approval



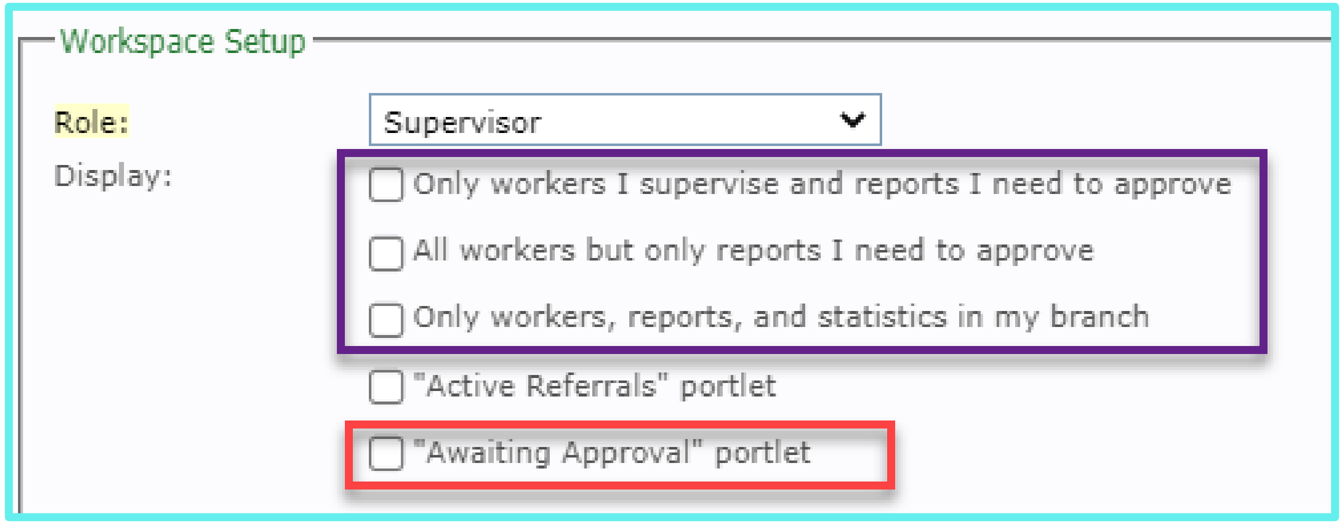
Case/Licensing Worker Workspace

- All cases (vs. just cases assigned to me)
- All cases in my branch (vs. just cases assigned to me)
- All licensed homes (vs. just homes assigned to me)
- All licensed homes in my branch (vs. just homes assigned to me)
- "Active Referrals" portlet



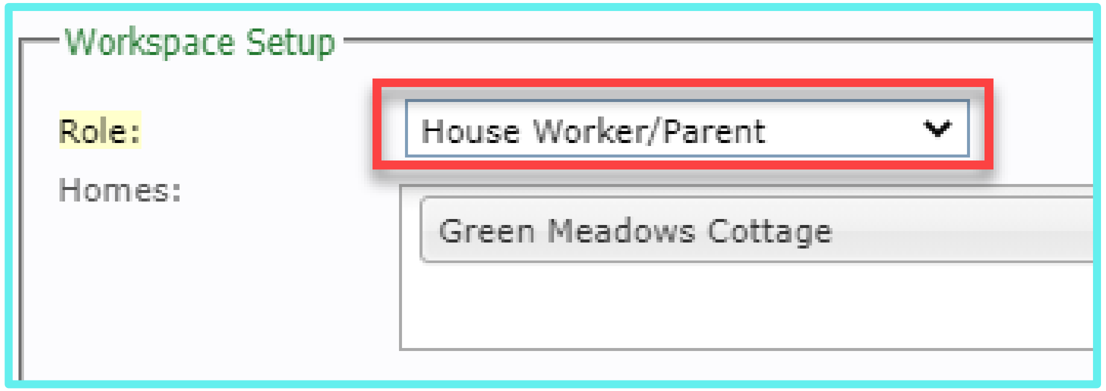
Supervisor Workspace

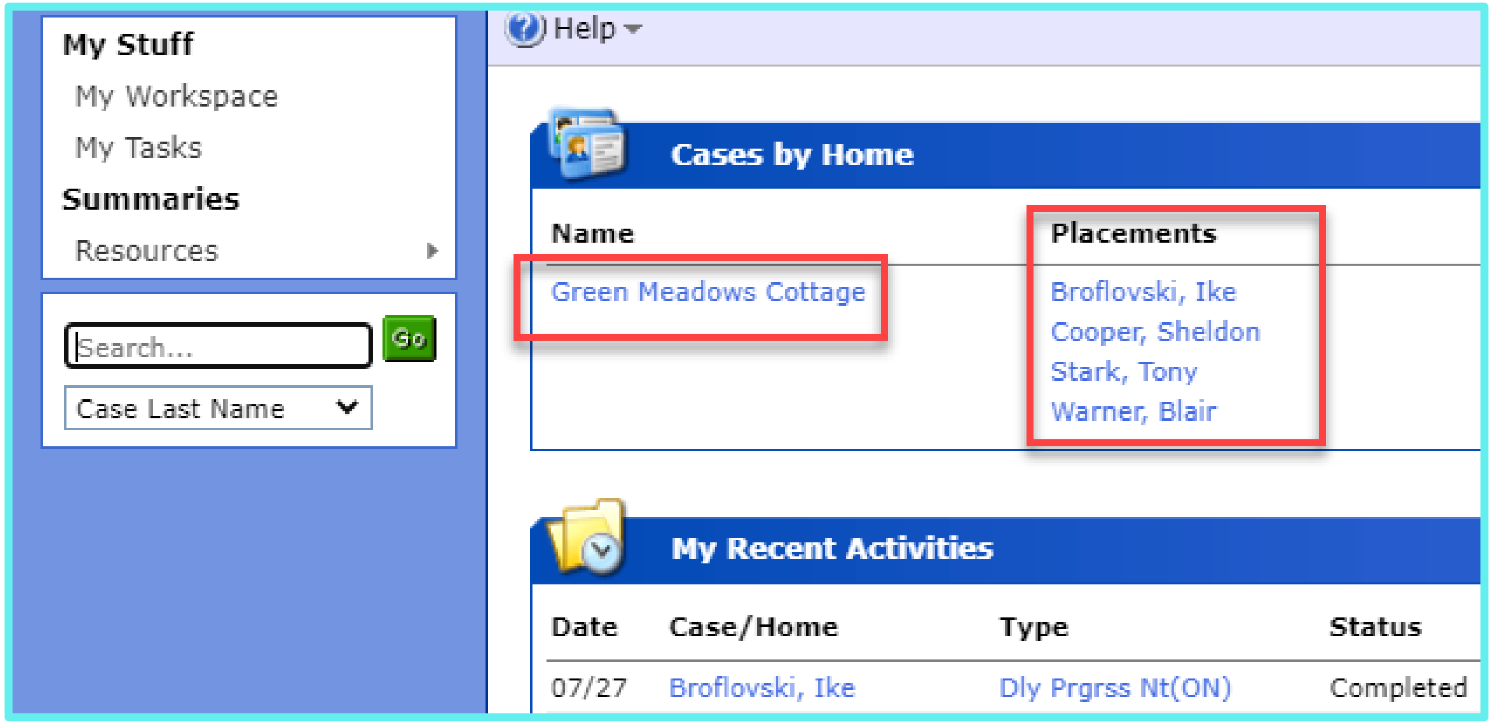
- Only workers I supervise and reports I need to approve
- All workers but only reports I need to approve
- Only workers, reports, and statistics in my branch
- "Active Referrals" portlet
- "Awaiting Approval" portlet



House Worker/ Parent Workspace

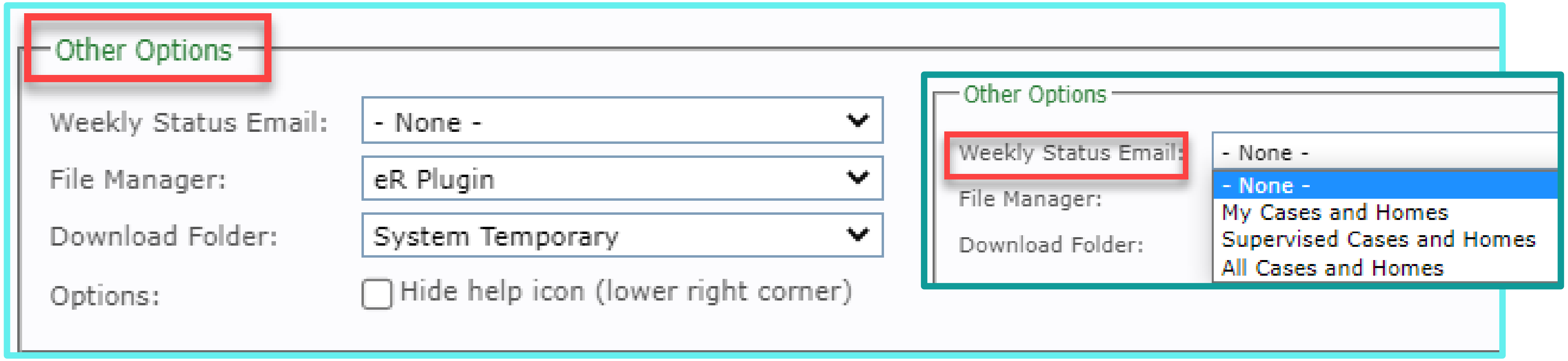
- For Direct Care Staff or House Parents
- Homes field – select homes the house worker/parent will access
- Limits them to placed clients in the selected homes





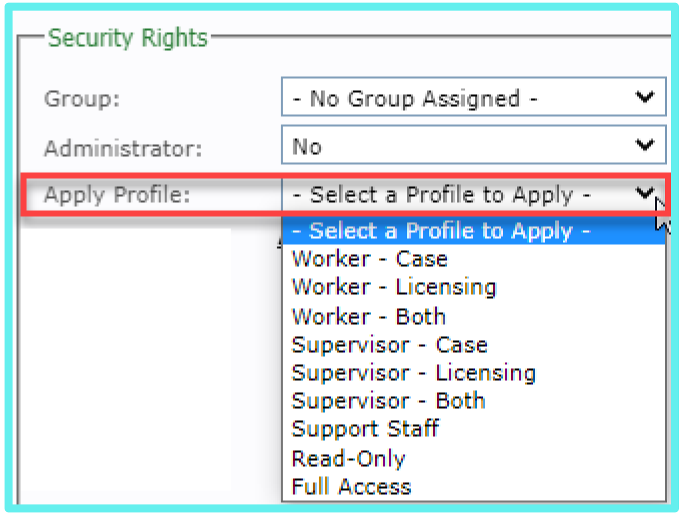
Other Options

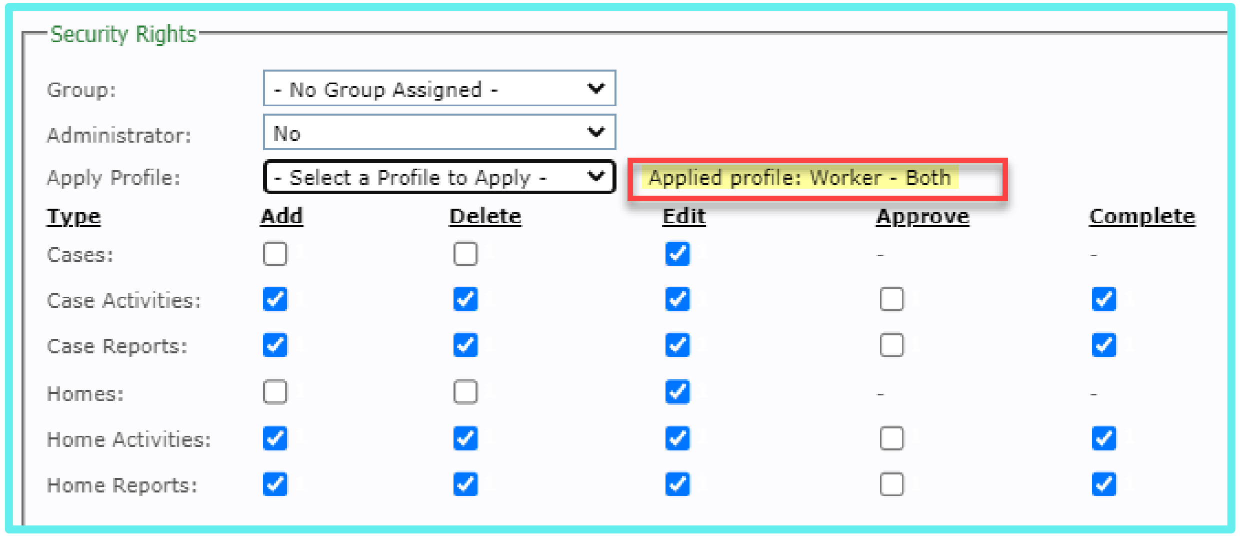
- Weekly Status Email – send weekly emails to varying groups including cases and homes (emailed weekly Sunday 5pm EST)
- File Manager – eR Plugin (default) is extendedReach's proprietary software that allows users to edit word documents right in the eR database.
- Download Folder – location extendedReach temporarily holds your file while you edit it in eR Plugin.



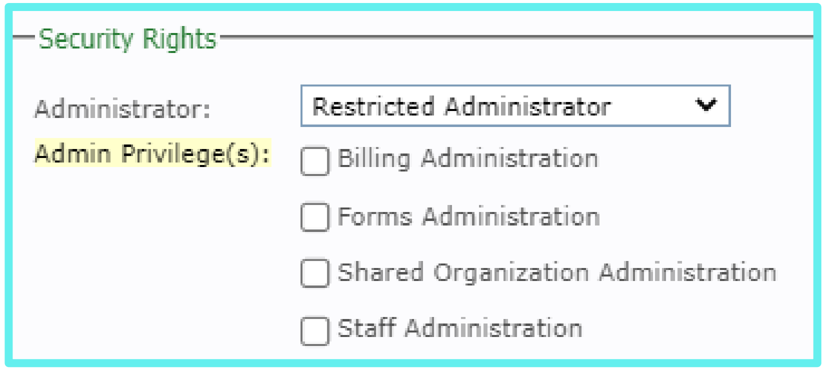
Security Rights

- Group – select user group, if applicable
- Administrator – level of security includes no, Full Admin, Restricted Admin
- Apply Profile – the system will auto-populate roles typically performed; adjust the selections by checking or un-checking items.
- Miscellaneous Permissions – adjust “Miscellaneous Permissions” for the user



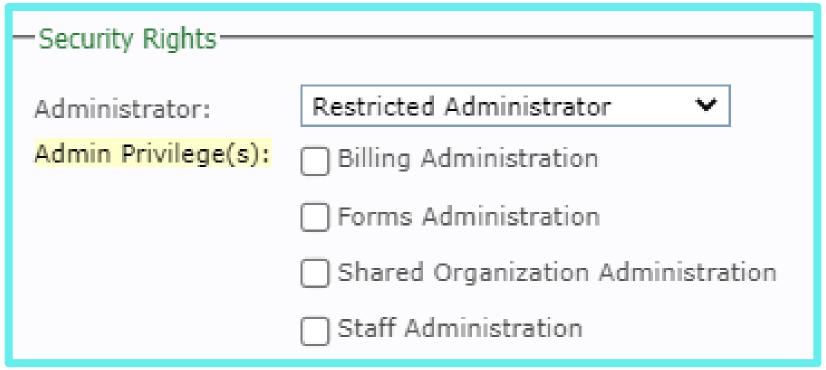


Security Rights – Administrator



- No Administrator
  - No access to any administrative functions
  - Most common for caseworkers, licensing workers, therapists, shift staff, interns, etc.
- Full Administrator
  - Full access to all administration functions (billing, forms, staff, and shared access)
  - Ability to add/change/delete users and modify security permissions for a user
  - Ability to change items in the Organization Preferences screen
- Restricted Administrator
  - Billing
  - Forms
  - Staff
  - Shared – access to multiple organizations

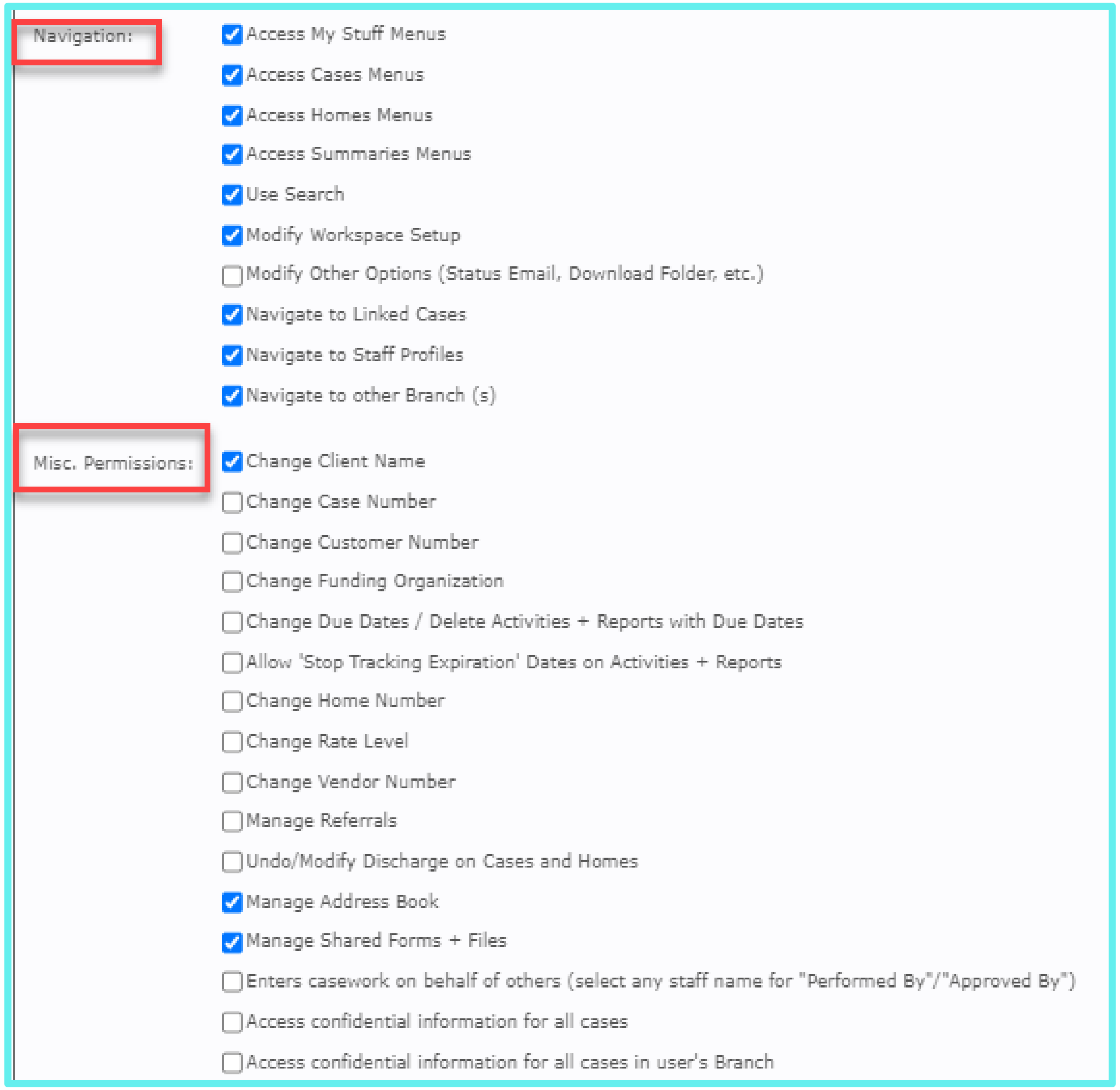
Restricted Administrator



- Billing Administration
  - Accounting staff that generate days care billing and accounts payable batches
  - Add/change/delete days care billing rate sheets
  - Create and post client charges, payments, and adjustments (if "Aging" module enabled)
- Forms Administration
  - Support Staff that need access to Configurator
  - Manage Email Alerts
  - Manage Scheduled Training
  - Manage Foster Family Website content
- Shared Administration (available only to agencies set up as multiple organizations in eR)
  - Access linked/shared organizations (e.g., foster care and residential orgs)
  - Any additional restricted admin capabilities granted to this user (e.g., billing admin, forms admin, and staff admin) are also available within shared organizations
- Staff Administration
  - HR staff
  - Add + edit Staff Records (not User ID's), access personal staff data, expiration dates, add staff training and documents

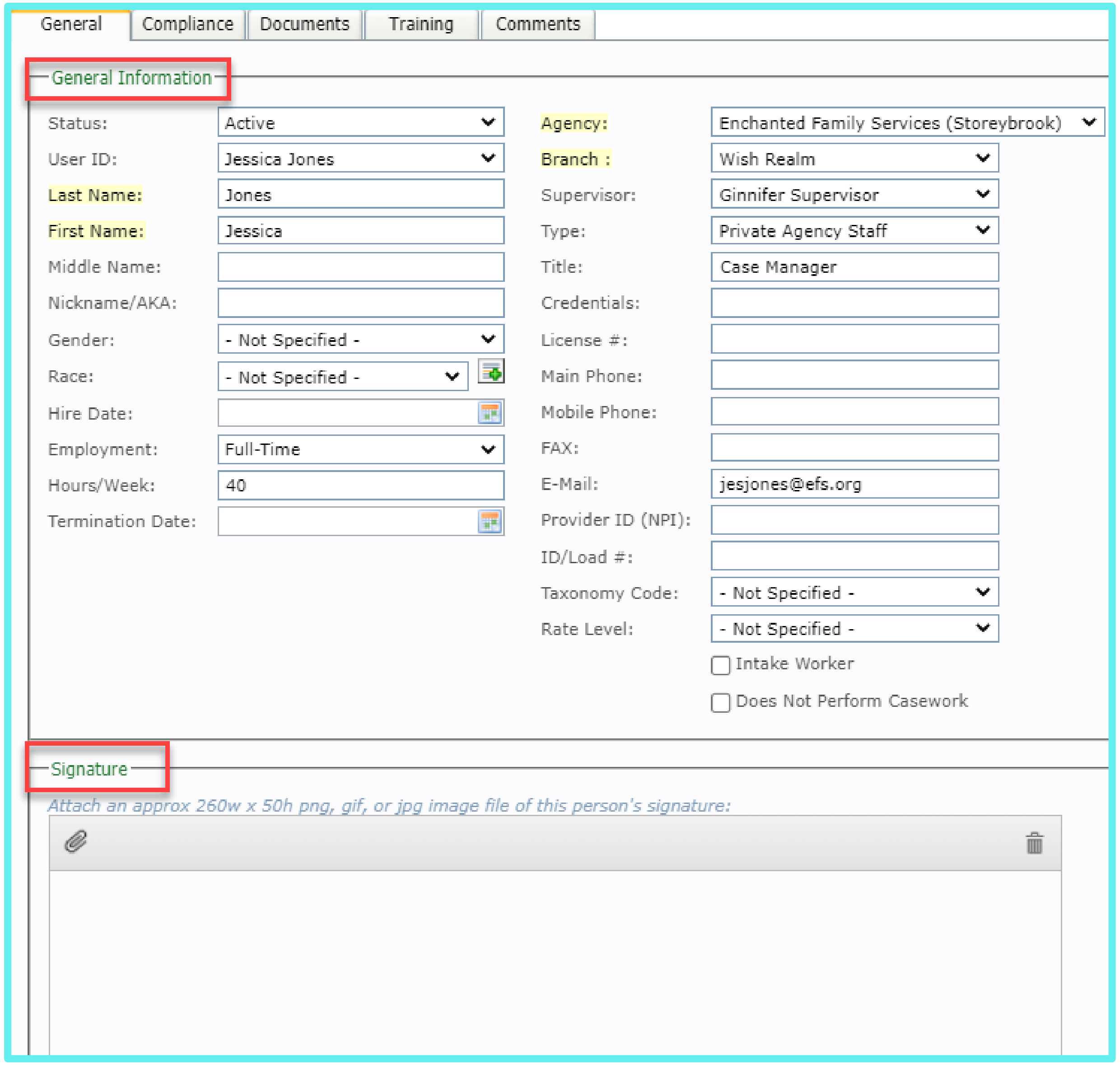
Security Rights

- Navigation – Determines Left-side Menu Options
  - My Stuff
  - Case Menus
  - Home Menus
  - Summaries Menus
  - Search and Others – linked cases, staff profiles, branches, etc.
- Misc. Permissions
  - Change information
  - Manage Referrals, Address Book or Shared Files
  - Access or Restrict Access to Information, Activities or Reports



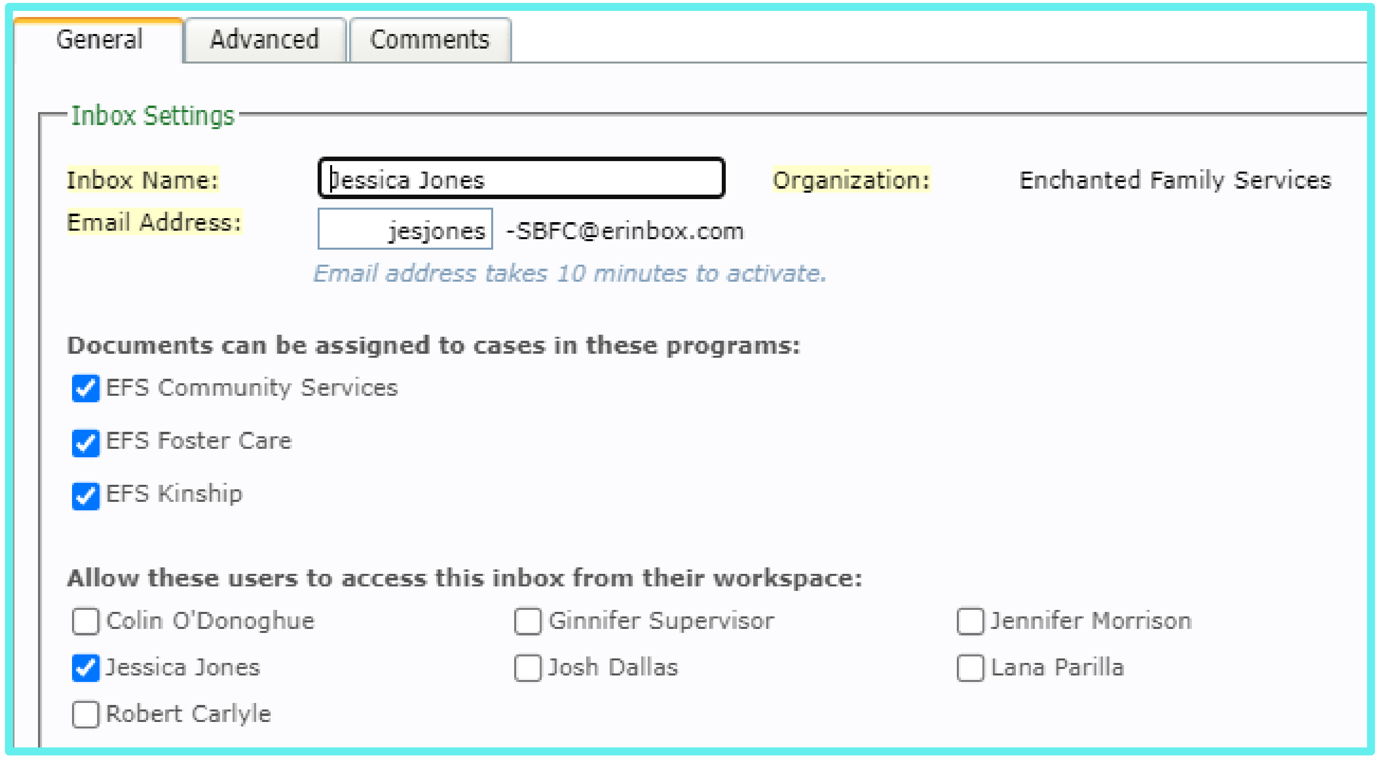
Staff Profile

- Required when a new employee’s role includes working with cases or homes
- Collects information such as demographics, supervisor, signature, credentials, phone numbers, hire date, and other information
- 2nd step for adding a new hire following creating a User ID, if you did not check the box to automatically create the Staff Profile
- Intake Worker – indicates that a worker is only doing intakes so they will not be counted as a caseworker change in the stats
- Does Not Perform Casework – removes staff name from staff fields on records, activities and reports (for executive or read only staff, etc.)



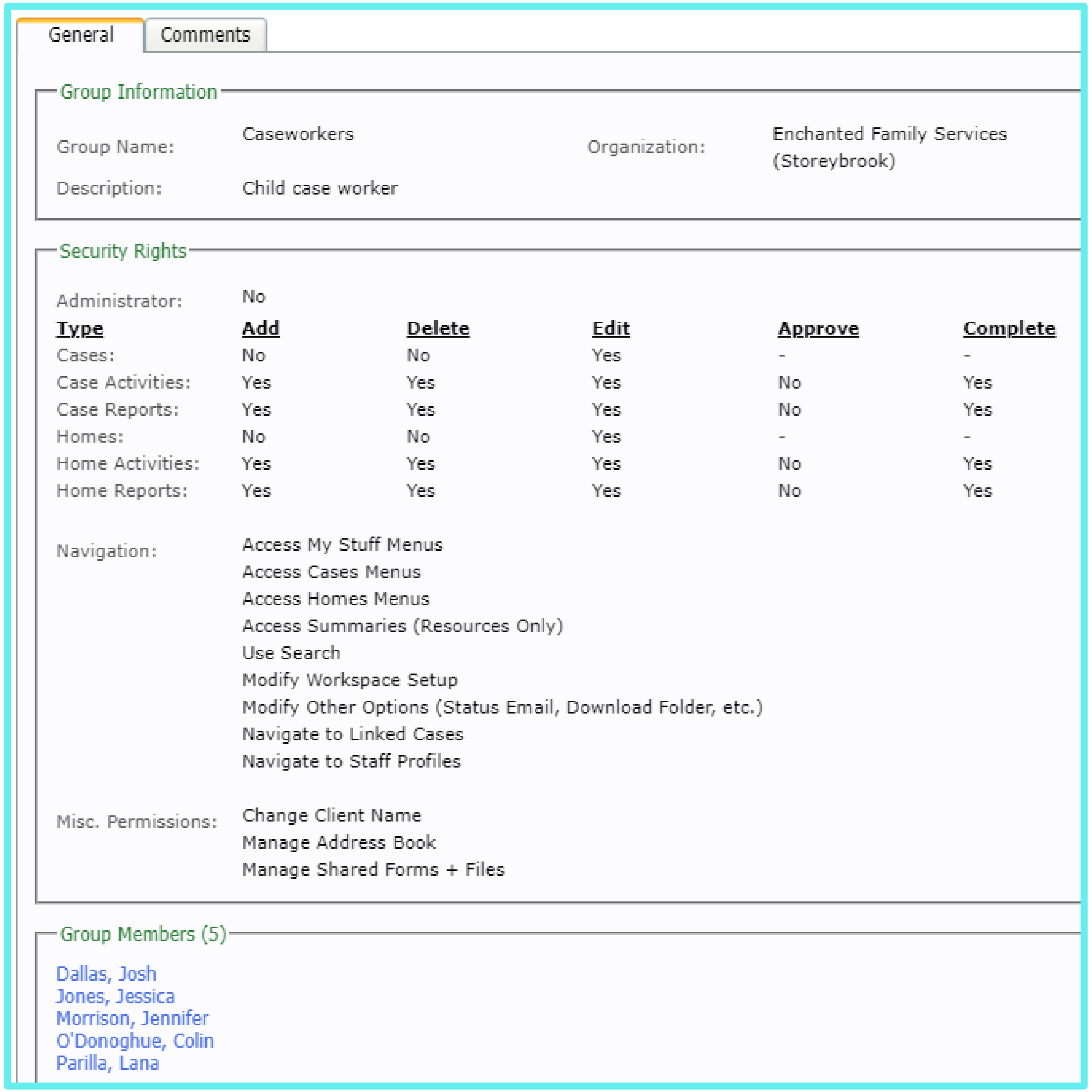
Inbox (Package Specific)

- 3rd Step if you did not check box to automatically create when adding new User ID
- Go to Administration > Organization Settings > Inboxes
- Add name, email address, select program(s) and user
- Could create a group inbox email also, if appropriate



User Group

- Same Security Rights options found on User ID
- Set permissions for a specific group of staff (interns, case manager, direct care staff, supervisors, etc.)
- Changes to permissions will automatically apply to all associated staff
- List of group members displays at bottom (names are links to User IDs)



General | Comments

Group Information

Group Name: Caseworkers

Organization: Enchanted Family Services (Storeybrook)

Description: Child case worker

Security Rights

Administrator: No

Type	Add	Delete	Edit	Approve	Complete
Cases:	No	No	Yes	-	-
Case Activities:	Yes	Yes	Yes	No	Yes
Case Reports:	Yes	Yes	Yes	No	Yes
Homes:	No	No	Yes	-	-
Home Activities:	Yes	Yes	Yes	No	Yes
Home Reports:	Yes	Yes	Yes	No	Yes

Navigation:
Access My Stuff Menus
Access Cases Menus
Access Homes Menus
Access Summaries (Resources Only)
Use Search
Modify Workspace Setup
Modify Other Options (Status Email, Download Folder, etc.)
Navigate to Linked Cases
Navigate to Staff Profiles

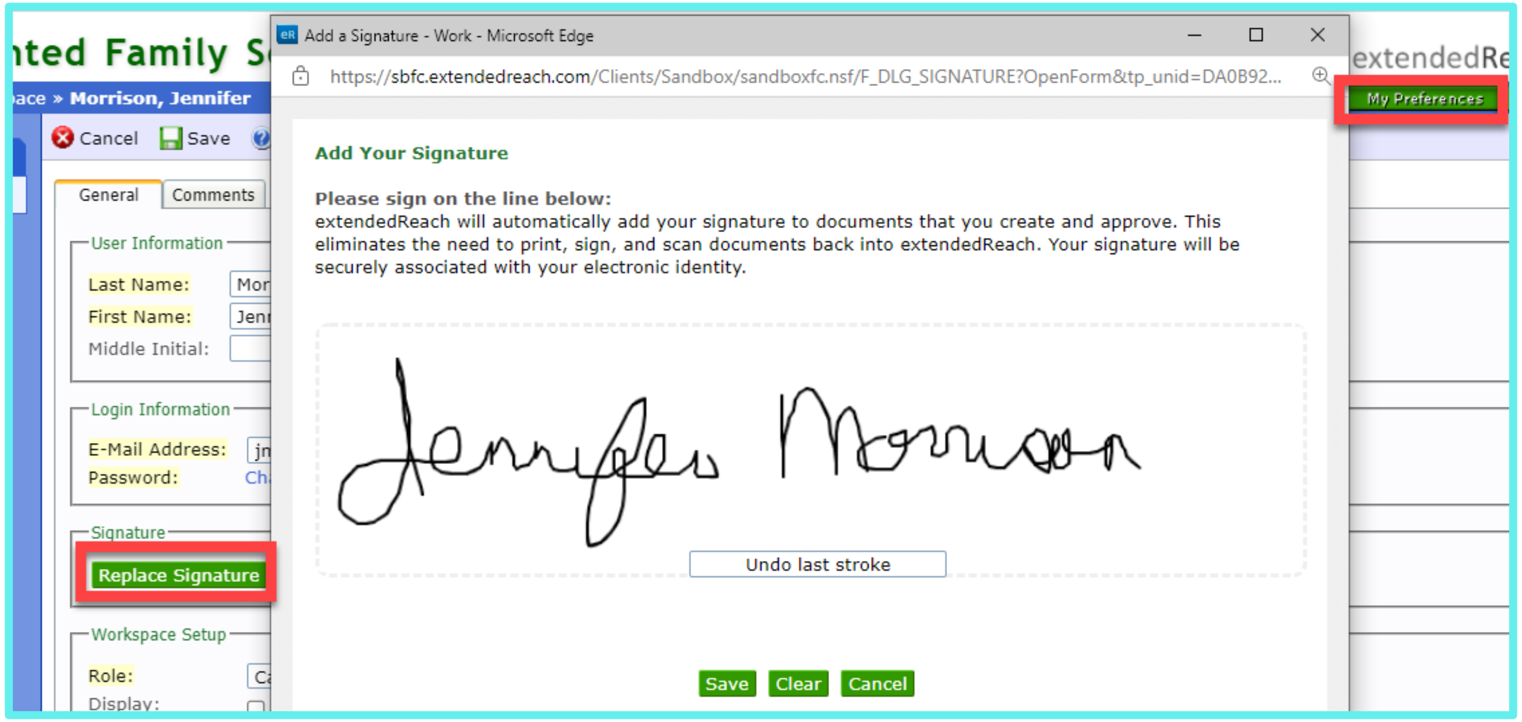
Misc. Permissions:
Change Client Name
Manage Address Book
Manage Shared Forms + Files

Group Members (5)

Dallas, Josh
Jones, Jessica
Morrison, Jennifer
O'Donoghue, Colin
Parilla, Lana

Signatures – Add through My Preferences

- User can add their own signature by clicking My Preferences in right upper corner of workspace and then clicking Replace Signature
- Use mouse, keypad or touch screen to sign
- Save



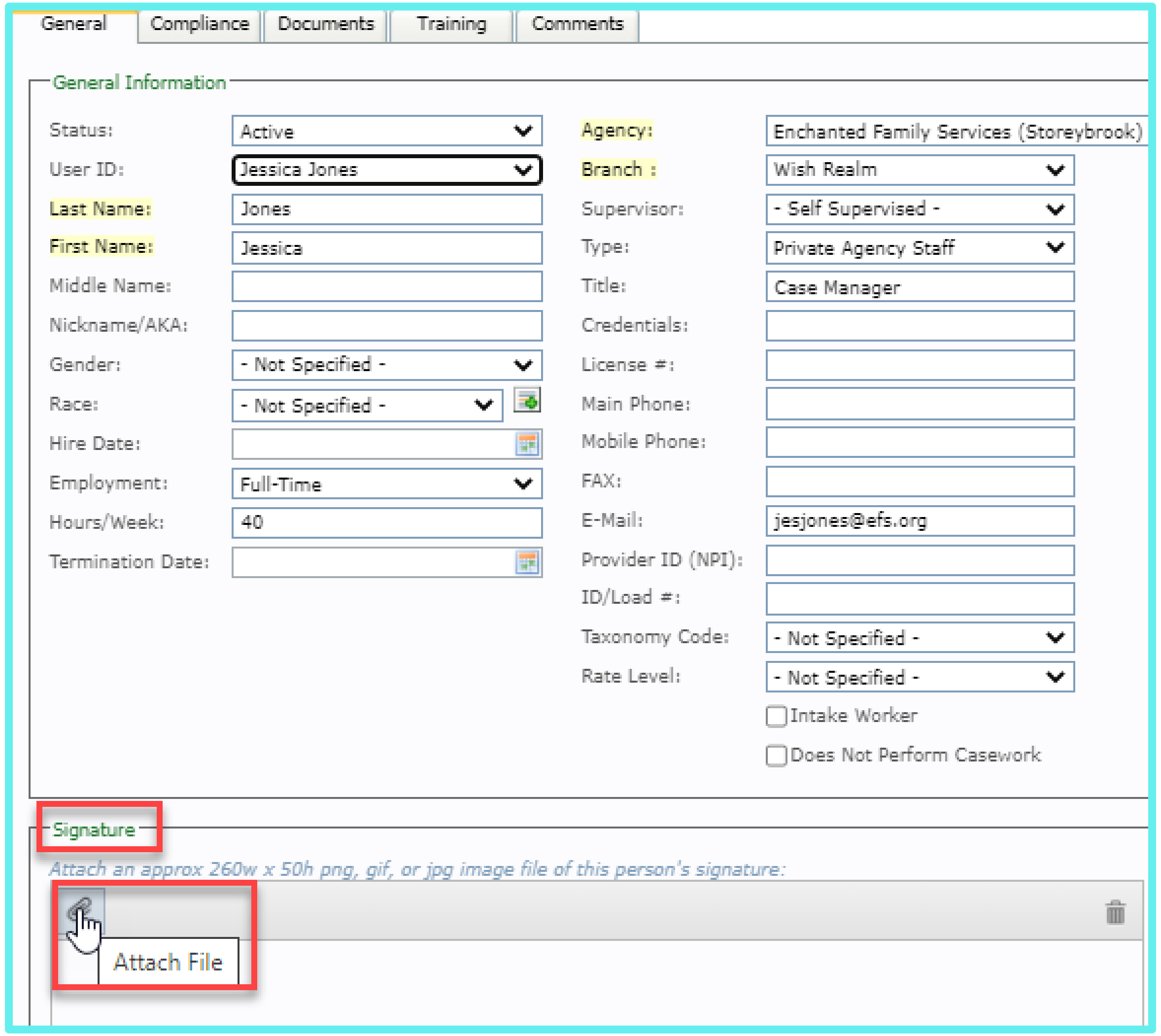
Upload Signatures

- To upload a new signature:
  - Have staff sign a white index card or blank unlined paper
  - Use dark ink and include credentials, if applicable
  - Print name on back in case signature is not legible to person who will scan and upload it to eR
  - Scan and save as a PNG, GIF or JPG file (approx. 260w x 50h). Crop as much white space around signature as possible or it will appear small. Use Microsoft Paint, Snipping Tool or Snagit to resize it.

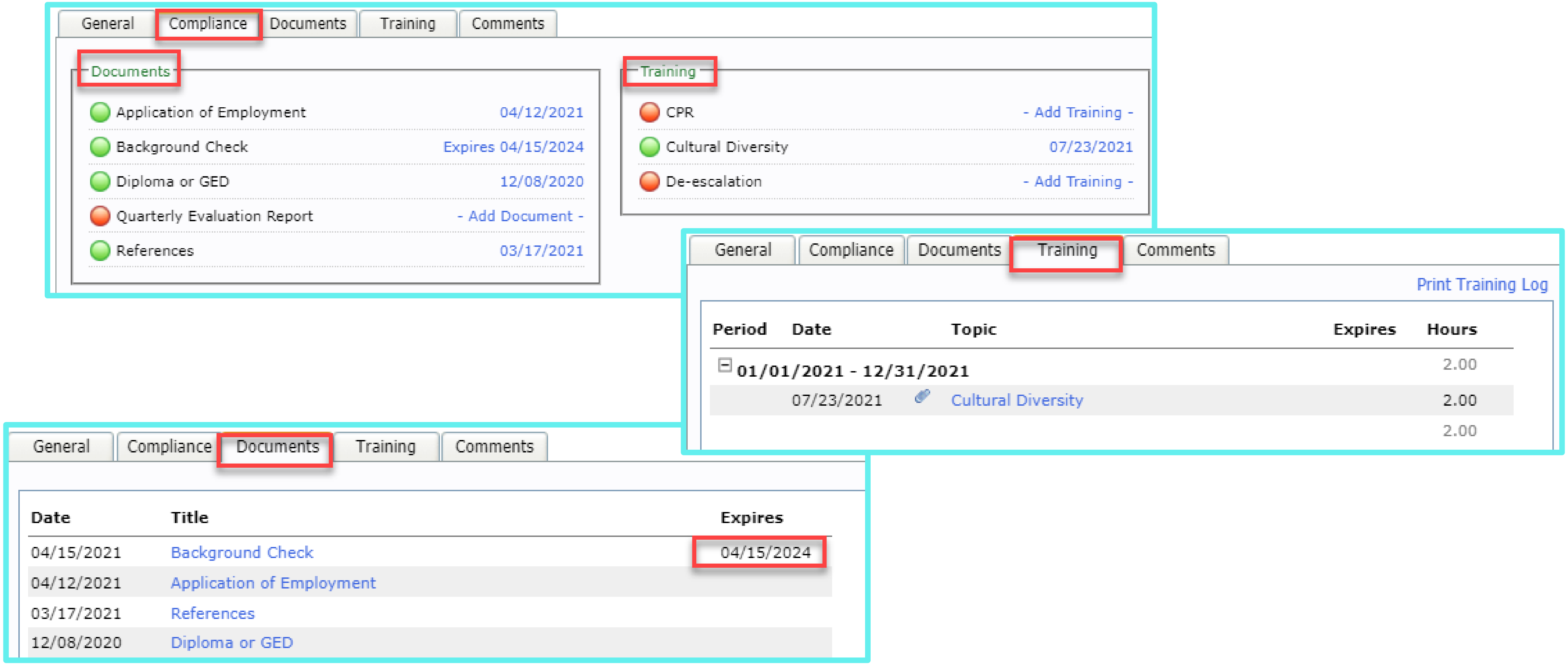
- Navigate to Administration > Org Settings > Staff Profile and select user.

- Click edit, scroll to signature box and click paperclip.

- Select signature image file from your computer and save.

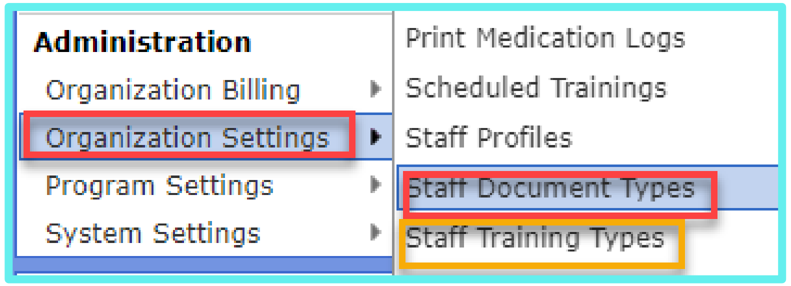


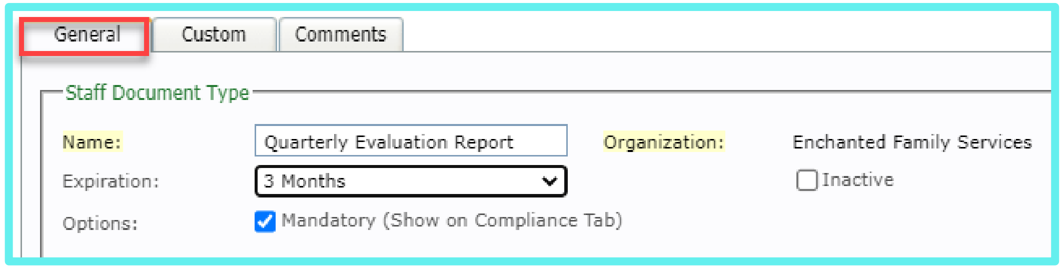
Staff Documents & Training

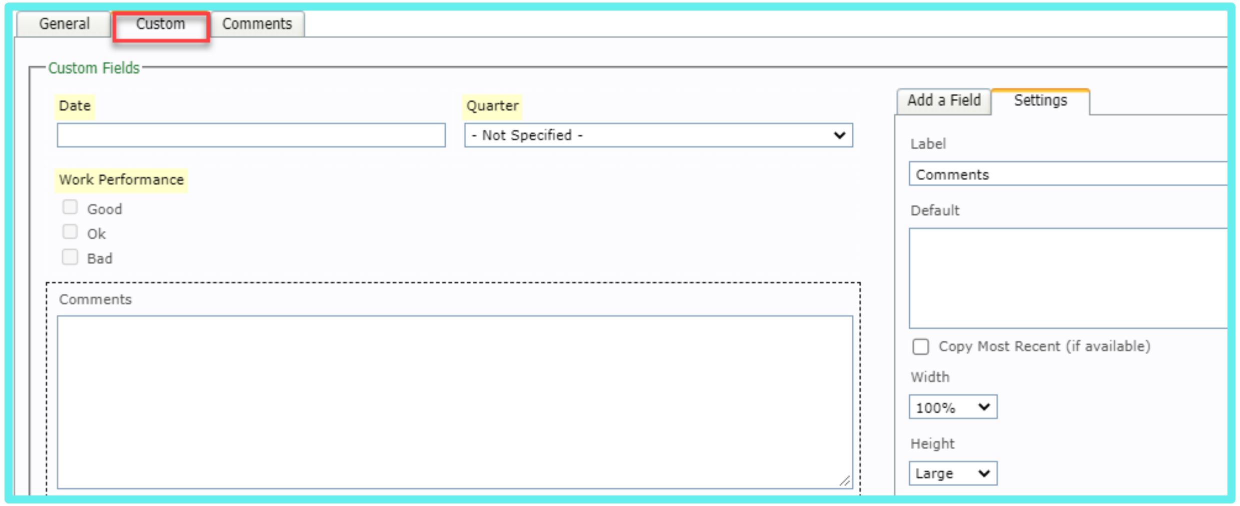


Staff Documents

- Navigate to Organization Settings > Staff Document Types > Click Add Document Type
- Add Name of Document
- Select Expiration Date (range = None, User Specified, 1-24 months, 48 & 60 months)
- Check Mandatory (Show on Compliance Tab), if applicable
- If Custom Form, click Custom Tab and enter custom form builder fields

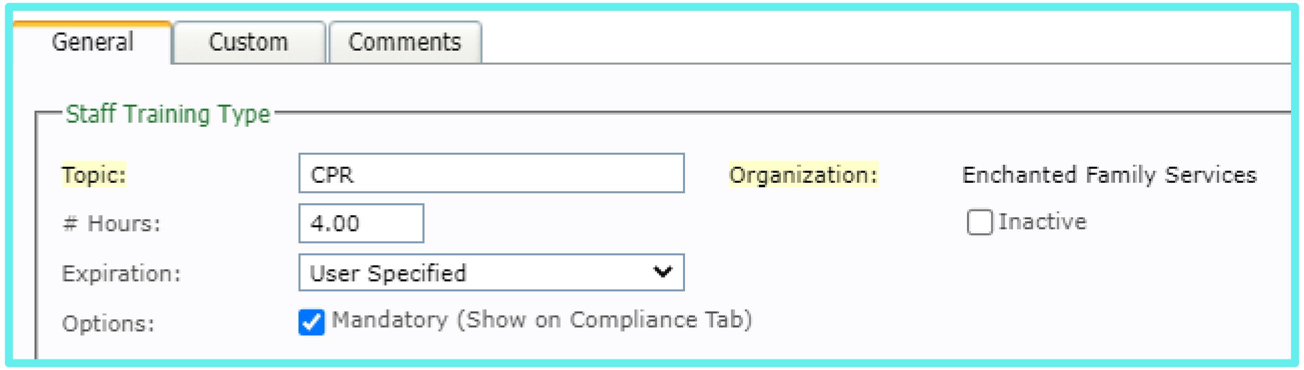


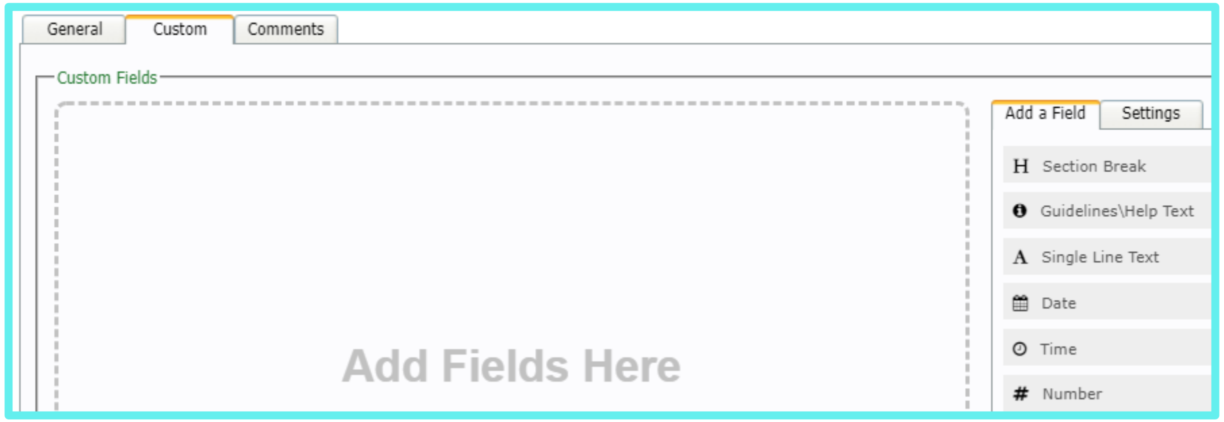




Staff Training Types

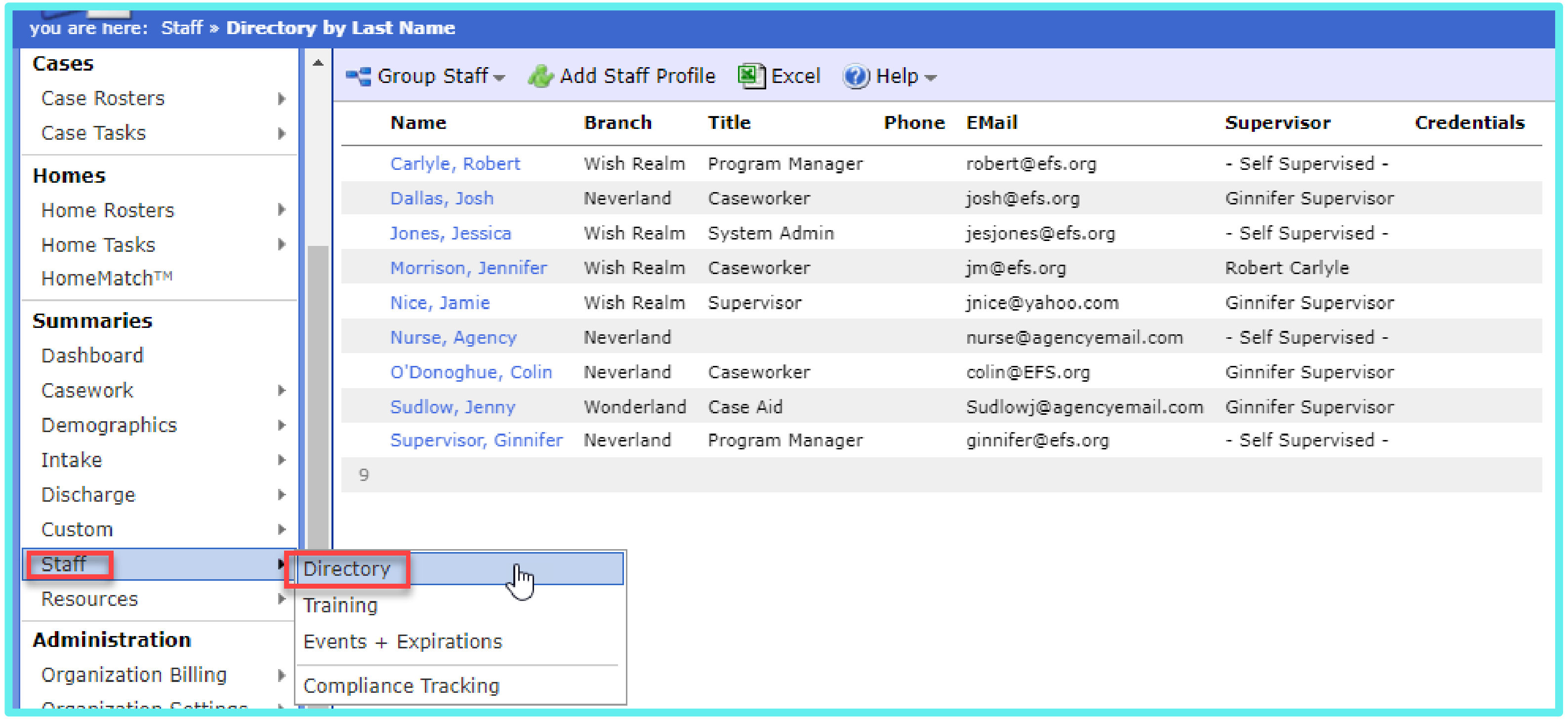
- Navigate to Organization Settings > Staff Document Types > Click Add Training Type
- Add Topic
- Enter # Hours
- Select Expiration Date (range = None, User Specified, 1-24 months, 48 & 60 months)
- Check Mandatory (Show on Compliance Tab), if applicable
- If Custom Form, click Custom Tab and enter custom form builder fields





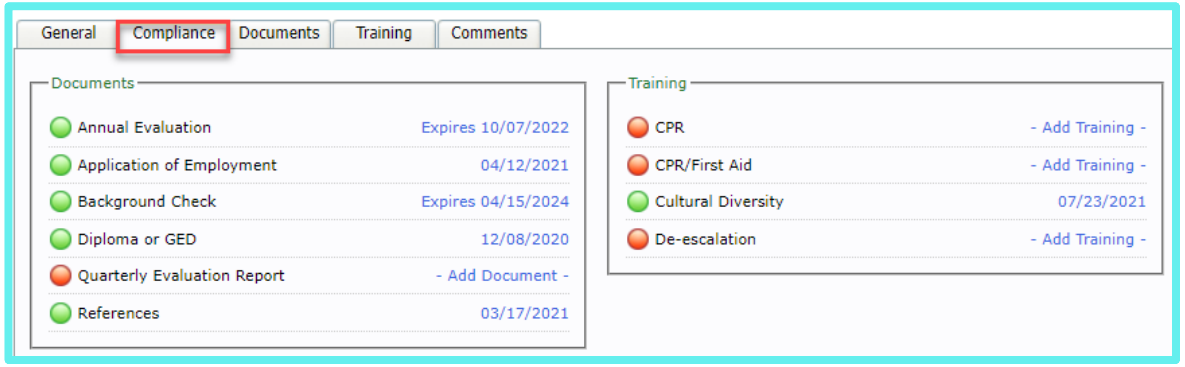
Summaries > Staff Reports

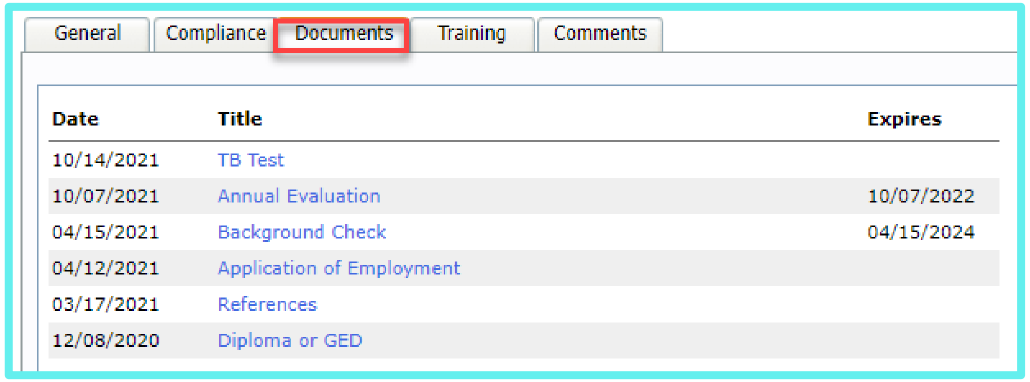
- Directory – list of staff and contact information
- Training
- Events + Expirations
- Compliance Tracking

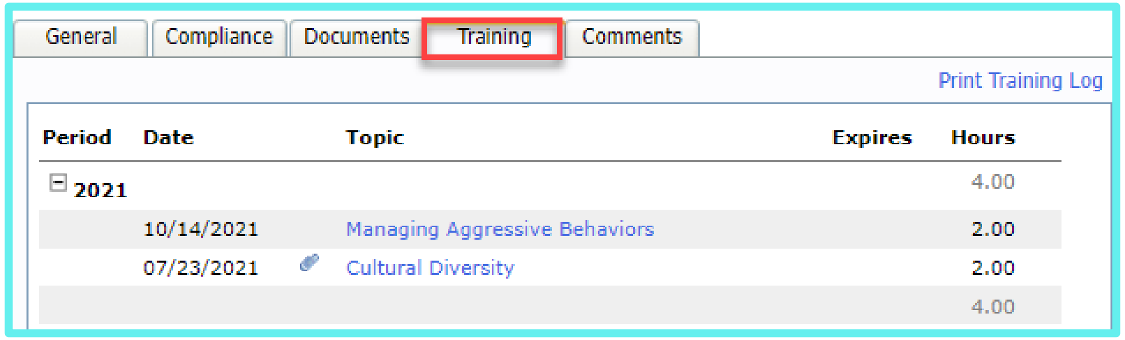


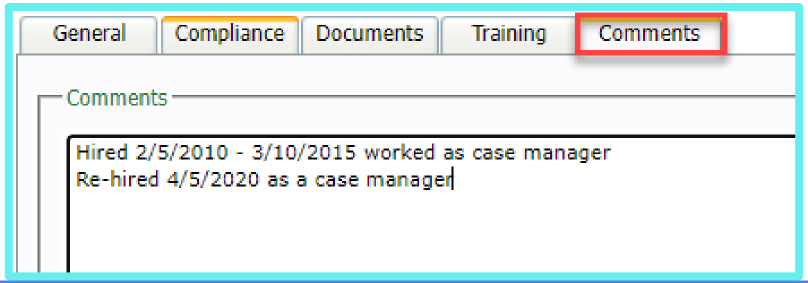
Summaries > Staff Reports

- Directory – access staff profile records:
  - Compliance
  - Documents
  - Training and
  - Comments tabs



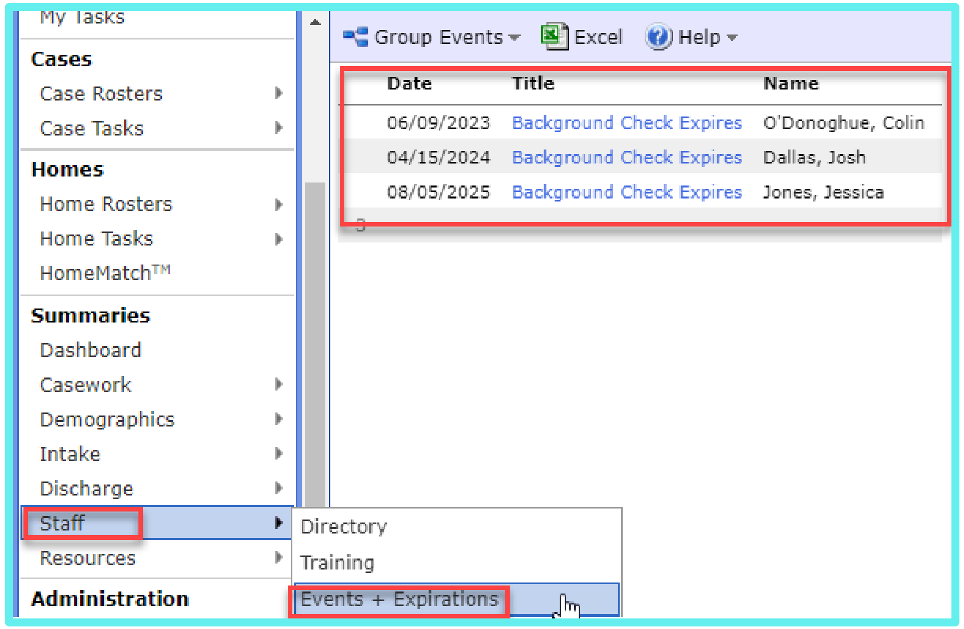


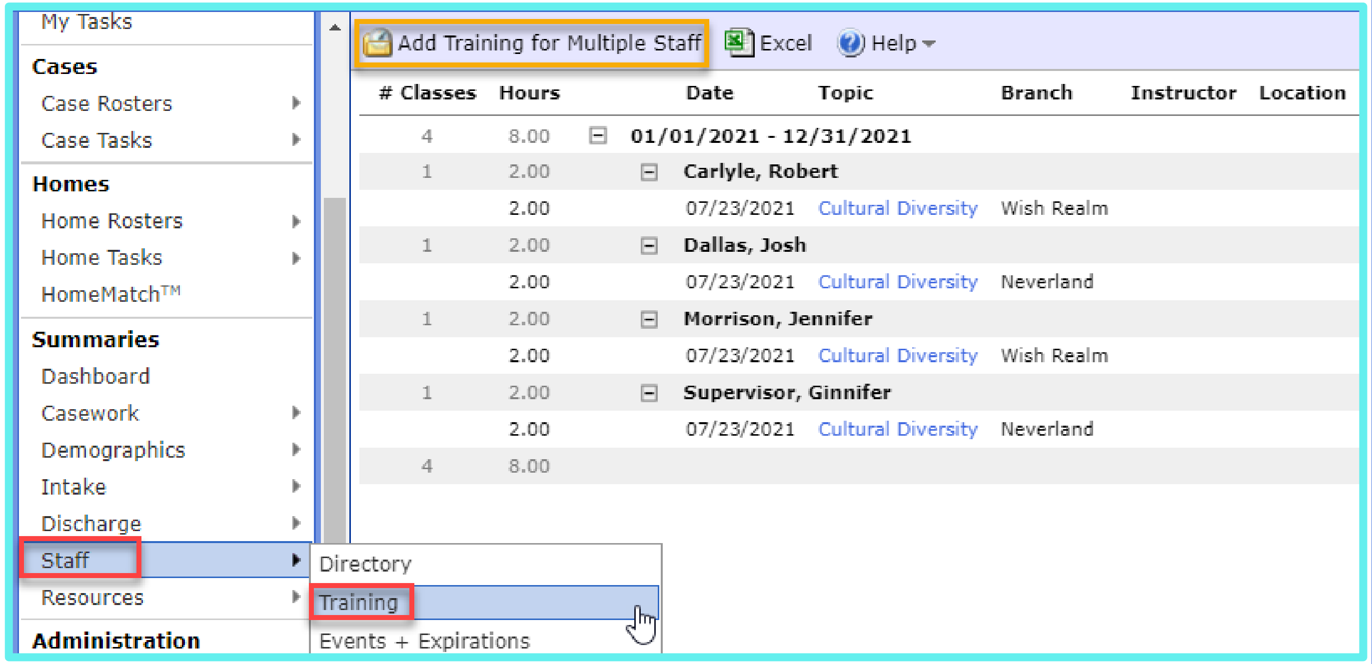




Summaries > Staff Reports

- Training
  - Add Training for Multiple Staff
- Events + Expirations





Summaries > Staff Reports

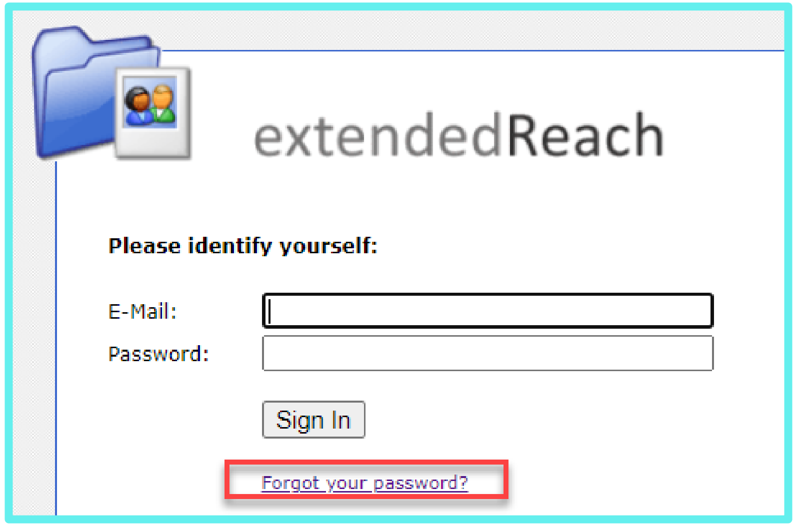
- Compliance Tracking – visual representation of last document or training added for each staff

Excel Help

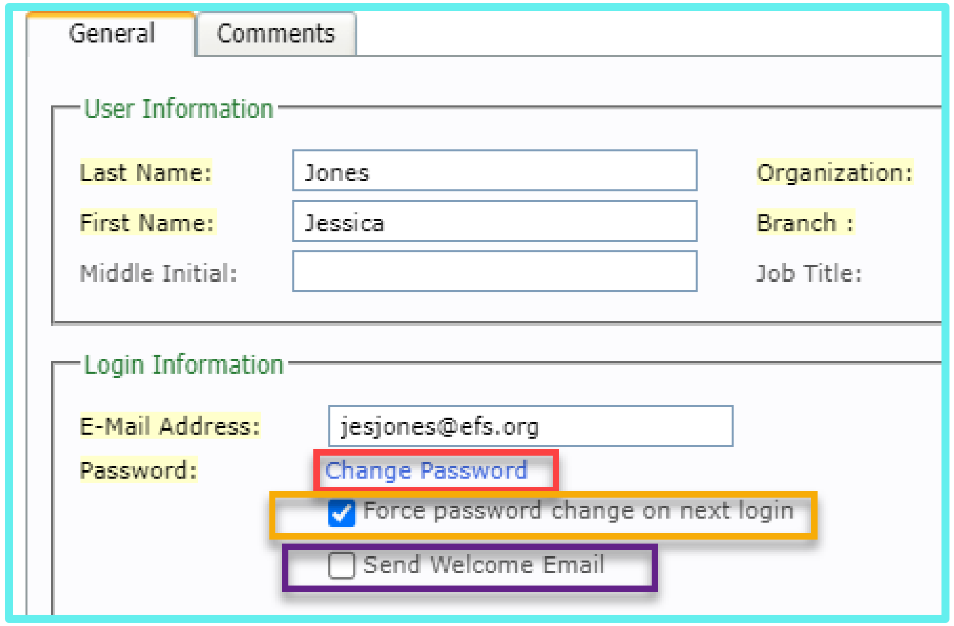
Staff Name	Branch	Annual Evaluation	Application of Employment	Background Check
Carlyle, Robert	Wish Realm	Missing	08/05/2021	04/14/2021
Dallas, Josh	Neverland	10/07/2022 (Expires)	04/12/2021	04/15/2024 (Expires)
Jones, Jessica	Wish Realm	02/25/2022 (Expired)	08/04/2021	08/05/2025 (Expires)
Morrison, Jennifer	Wish Realm	Missing	Missing	Missing
Nice, Jamie	Wish Realm	Missing	Missing	Missing
Nurse, Agency	Neverland	Missing	Missing	Missing
O'Donoghue, Colin	Neverland	Missing	Missing	06/09/2023 (Expires)
Sudlow, Jenny	Wonderland	Missing	Missing	Missing
Supervisor, Ginnifer	Neverland	Missing	Missing	Missing

Staff Management – Reset Passwords

- Users can reset their own password by clicking “Forgot password” link on login screen

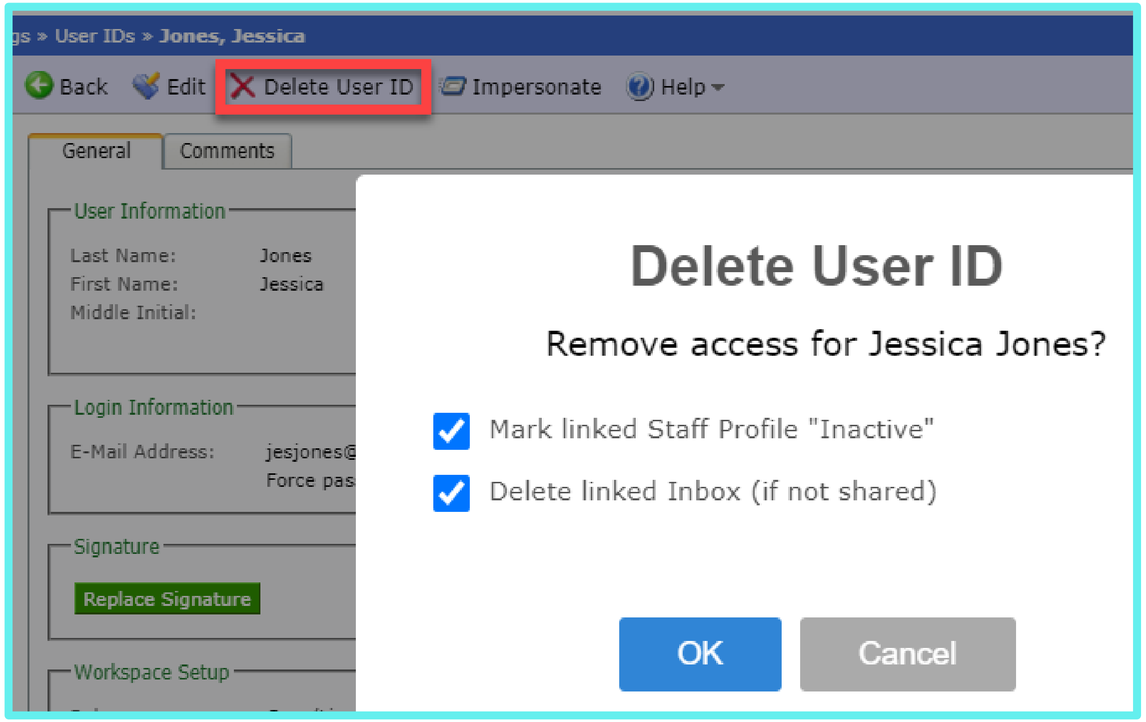


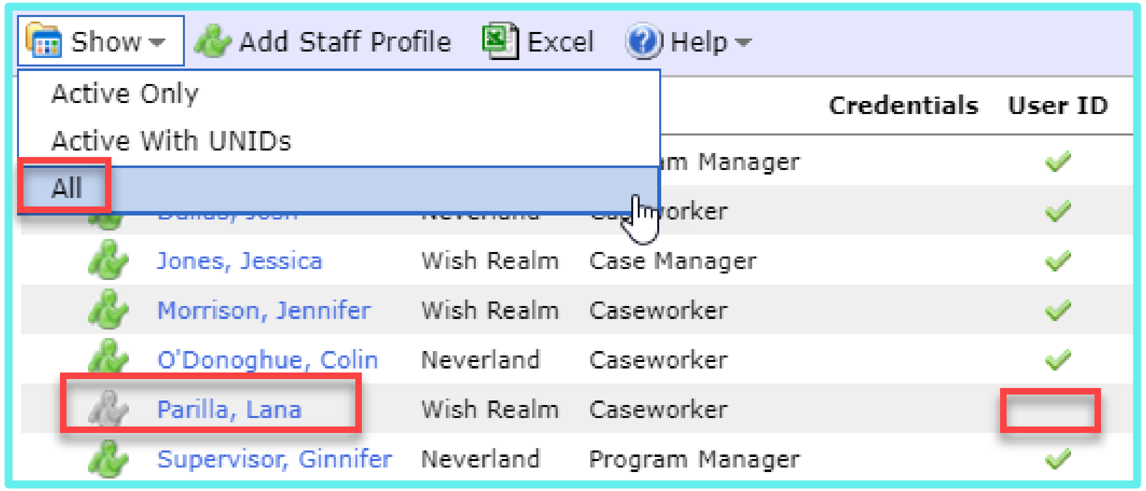
- System Admin can reset under Administration > Organization Settings > User IDs
  - Edit User ID record
  - Click Change Password and enter/confirm new password
  - Check box to force password change on next login
  - Send Welcome Email – this will give user their new temporary password as well as remind them of their username



Staff Management – Inactivate Users

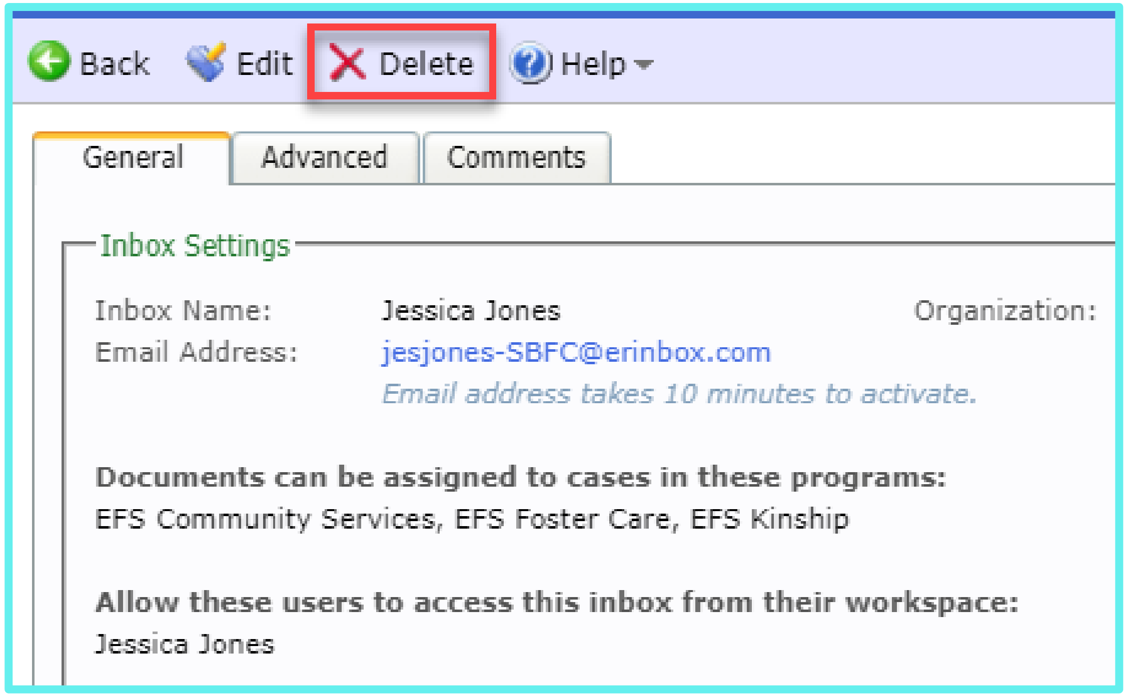
- Navigate to Administration > Organization Settings > User ID
  - Select Staff from List
  - Click Delete User ID (prevents user from logging into the system)
    - Leave box checked to inactivate staff profile
    - If applicable, leave box checked to delete linked Inbox
  - Access inactive staff under Staff Profiles – Show All to re-activate if they return
    - No User ID indicates they cannot login





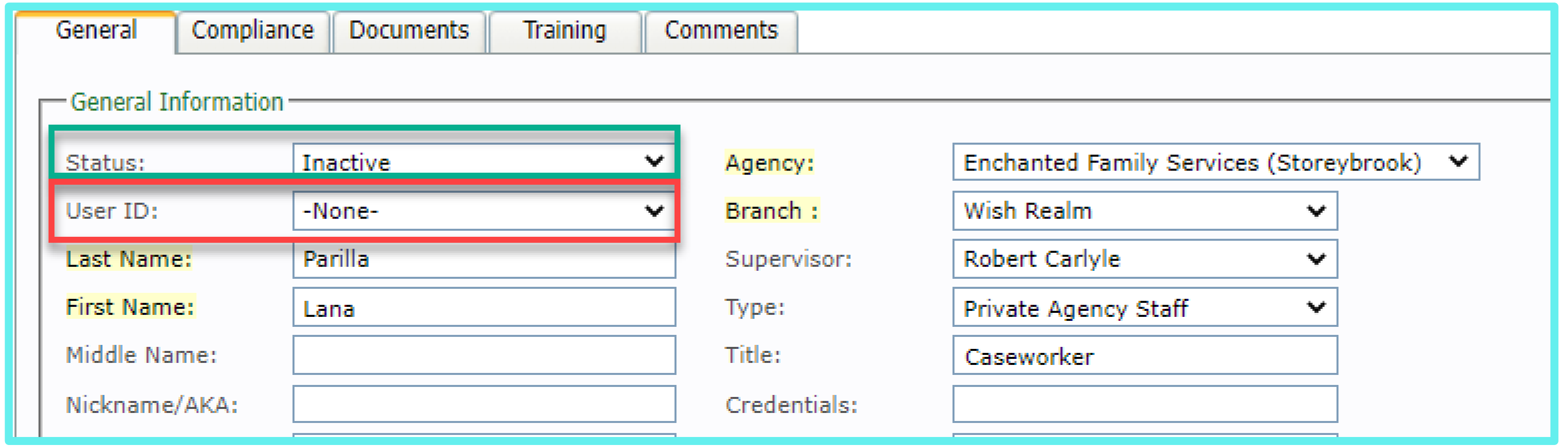
Staff Management – Inactivate Inbox

- Navigate to Administration > Organization Settings > Inboxes
- Select User's Inbox
- Click Delete from top menu



Staff Management – Re-activate User

- Add User ID but don't select create and link staff profile
- Go to Staff Profiles > Show All to access inactive staff profile. Edit the record and change Status to active and select the User ID to connect the records.
- Update other information, as applicable



Support Resources

Your Agency's System Administrator

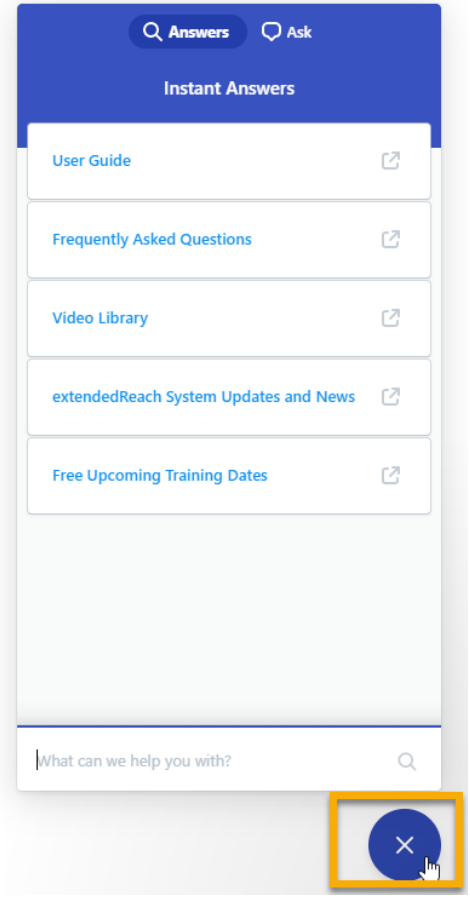
Access the User Guide

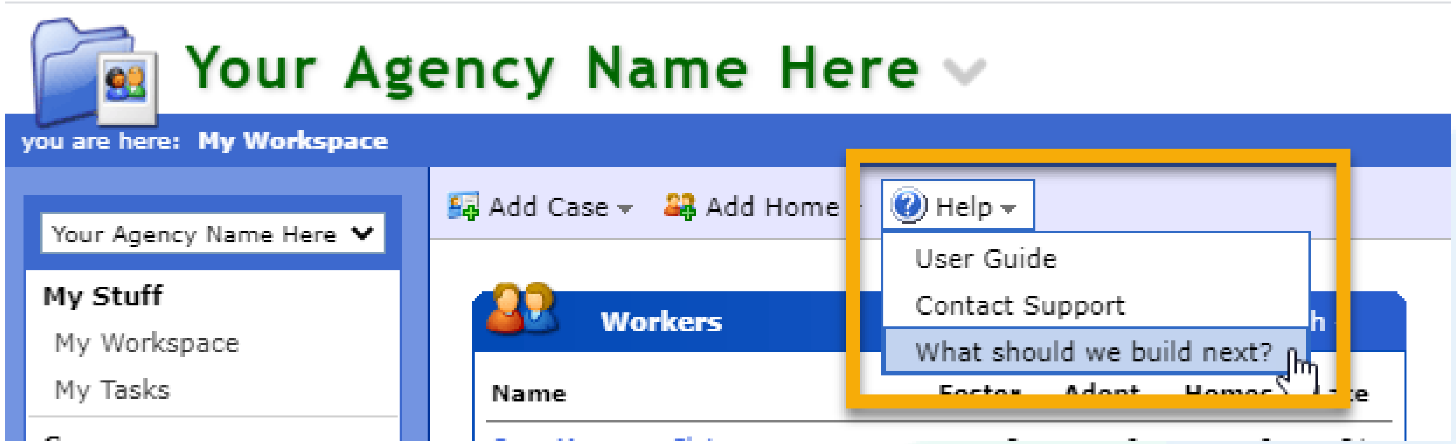
Submit a Support Ticket

Contact your Customer Success Manager

Submit an Idea

Support Resources





QUESTION
& ANSWER