SimplyHome
www.simply-home.com

QUICK START GUIDE: CREATING A CHECK-IN

https://simplyhomeapp.com/

1. Log In

Once you have received your username and password from *Simply*Home, visit the *Simply*Home Customer Web Portal by going to www.simply-home.com and clicking "LOGIN" in the top right corner. Select "Check-in Service Portal" to get to the client portal. If you forgot your password or didn't receive confirmation instructions via email, click on the appropriate link to reset.

2. Select Client

There is a client search bar available at all times in the top of the left menu. To search for a client, type in all or part of a client's name and click on the client's name. If you cannot find a client or the client does not yet exist, contact us at help@simply-home.com.

Check-in Creation

3. Set Up Check-in

After you have selected your client, you will be given a menu of options that pertain only to that individual. Navigate to the Check-in tab to view today's check-ins, create a new check-in, or edit an existing one. To add a new check-in, select the + button in the bottom right corner.

Step 1

Select a Check-in Time - This is the time of day that support team members should arrive to provide support.
Pre/Post Check-in Time Window - This is the acceptable time window before and after the Check-in time when support team members can complete a check-in. At the beginning of this time window, responders are alerted that the check-in is due. At the end of this window, responders are notified that the check-in is late.
Days - These are the days of the week that a check-in is active. Currently, check-ins are only supported to repeat on selected days of the week. For example, a check-in may begin at 9:00 AM every Monday, Wednesday, and Friday.

Step 2

Select a Location (Optional) - If a user would like to add location verification to a check-in, they must have a beacon set up and assigned to that client. If a beacon is set up and assigned to that client, select it here. If no beacon is set up for that client, you will receive a message that no beacons are available. If the location verification option is selected, the Responder App must communicate with the designated beacon before it will allow the support team member to complete a check-in at that location.
Select a Beacon Range - This is how close a user must be to the beacon in order to complete the check-in with the Responder App. There are two options: 1, within the same room; or 2, within the same home. Note: Ranges may vary depending on the size of the home. If you get an error message that you are not within range when trying to check-in, try moving closer to the beacon before trying again.

Step 3

Add Responders - Select the contacts who should receive alerts when a check-in is due. Then select the contacts who should receive alerts when a check-in is late. These contacts are alerted by email or text (SMS) when the check-in becomes due or is late. **Contacts receiving "check-in is now due" and "check-in is now late" alerts will also receive an alert if a check-out is late.

Step 4

Assign Tasks (Optional)- If you require tasks to be completed during a check-in, then a check-out will automatically be required. The check-out time window allows you to put an expiration time on completing the task. All tasks are customized by the user who is setting up the check-in; the user must type a description of each task.

Step 5

Create Check-in - This summary screen displays all of the check-in information so you can verify the details of a given check-in. Once you have checked over the details, press "Save Check-in."

GENERAL QUESTIONS

Q. Does everyone with log-in credentials have access to the same client information?

No. Support team members who have been given access to view and/or manage client-specific *Simply*Home technology supports are all set up as users, but in different roles, with varying levels of access:

Administrator - This user role serves as the administrator for a provider organization, and this role can make edits only to existing users and activate and deactivate check-ins. (*Simply*Home Customer Support will add and delete users.)

Client Manager - This user role has access to specific clients within a specific provider organization. This user can make changes to and interact with a client's check-ins, if they have access to that client. This user cannot set up new users, new clients, or new programs.

Client Staff - This user role has read-only access to specific clients within a specific provider organization. This user cannot set up new users, new clients, or new programs. This user cannot make changes to a client's check-ins, but they can acknowledge or skip alerts and complete check-ins for their clients.

Q. What does each check-in status mean?

Coming Up - This is the status on a given day before a check-in window starts.

Due Now - The check-in window has started, but a check-in is not yet complete and the time window for the check-in has not elapsed.

Check-out Pending - The check-in has been completed, but there are tasks associated with the check-in that are pending acknowledgment.

Late - This is when a check-in time window has elapsed without a complete check-in AND the next check-in is not yet due.

Missed - This is when a check-in time window has elapsed without a complete check-in AND the next check-in is now due. Once a check-in is missed, you can no longer complete the check-in.

Q. How do I view the history for all activity associated with each check-in?

The Check-in History tab on the client portal shows when all relevant check-in activities have happened. You can also view the history for each check-in through the *Simply*Home Responder App.

History Activity Key:

Checked-in - When a check-in is completed ontime, late, with incomplete tasks (comment required), or with tasks completed.

Upcoming Check-in Alert - This notification goes out to designated responders when a check-in is due.

Late Check-in Alert - This notification goes out to designated responders when a check-in is late.

Late Check-out Alert - If a check-in has tasks associated with it, all contacts selected as responders will get an alert when tasks have not been completed within the scheduled time frame.

Task Completion - After each checkbox for a task is marked complete, that information is documented whether you check-out or not.

Check-out - Indicates that tasks and the check-out were completed. Note: If tasks are not completed, then a comment is required to explain why tasks have not been completed, before a check-out will be allowed.

Skipped - Indicates that a responder skipped a check-in at the time a check-in was either due or late.

Cleared - Indicates that a responder cleared a check-in that was missed in order to reset the check-in status.

Check-in Preference Edit - Indicates there has been a change in contacts, contact method, task description, or the deletion of a task.

Q. How do I make changes to an existing check-in?

On the web portal, an authorized user managing more than one client can use the search feature to quickly find a client. Select the "Check-in" tab for that client and filter through active, inactive, or both check-in types to find the check-in you would like to update. Once you find the check-in, select the edit icon. This will walk you through a wizard where you can make changes to the time, days, responders, or tasks for that check-in. This will walk you through a wizard where you can make changes to the time, days, responders, or tasks for that check-in.