



MatrixCare Mobile

Set Up/User Guide

Table of Contents

Enabling Location Services.....	2
Setting up Matrixcare Mobile as Home Page	5
Registration Invite Email	7
Verification.....	7
Create Username and Password	9
Accept EULA	10
Create Signature PIN.....	11
Signing in to Matrixcare Mobile Application.....	13
Checking in at the Client Location.....	14
Entering Client Tasks.....	15
Couple Care Clients.....	16
Live-In Clients	16
Entering Mileage and Parking	17
Checking Out of the Client Location.....	17
Signing out of the Mobile Application	21

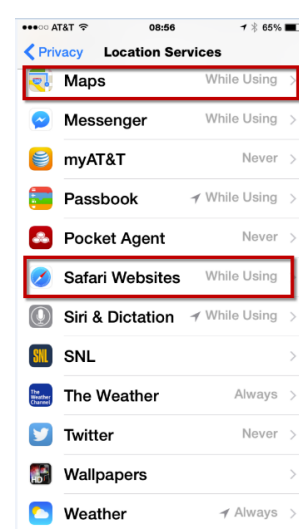
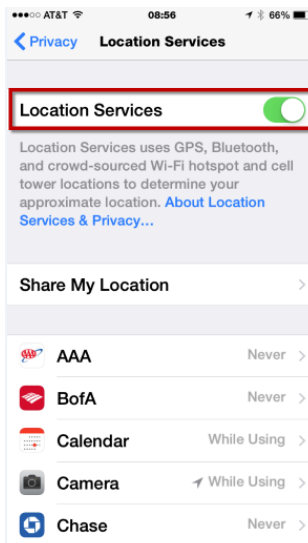
Enabling Location Services

In order to use MatrixCare Mobile, Locations Services must be turned on. To turn on location services on your phone, follow these instructions.

To turn on Location Services for an **Apple iPhone**:

1. On the main screen, press the **Settings** application.
2. Scroll down and press **Privacy**.
3. Check to see if Location Services is set to On.
4. If set to On, no action is required. If Location Services is set to Off, proceed to step 5.
5. Press **Location Services** option and slide the switch to the right. The switch will turn green.

Verify that Maps and Web apps have location Services turned on as well.

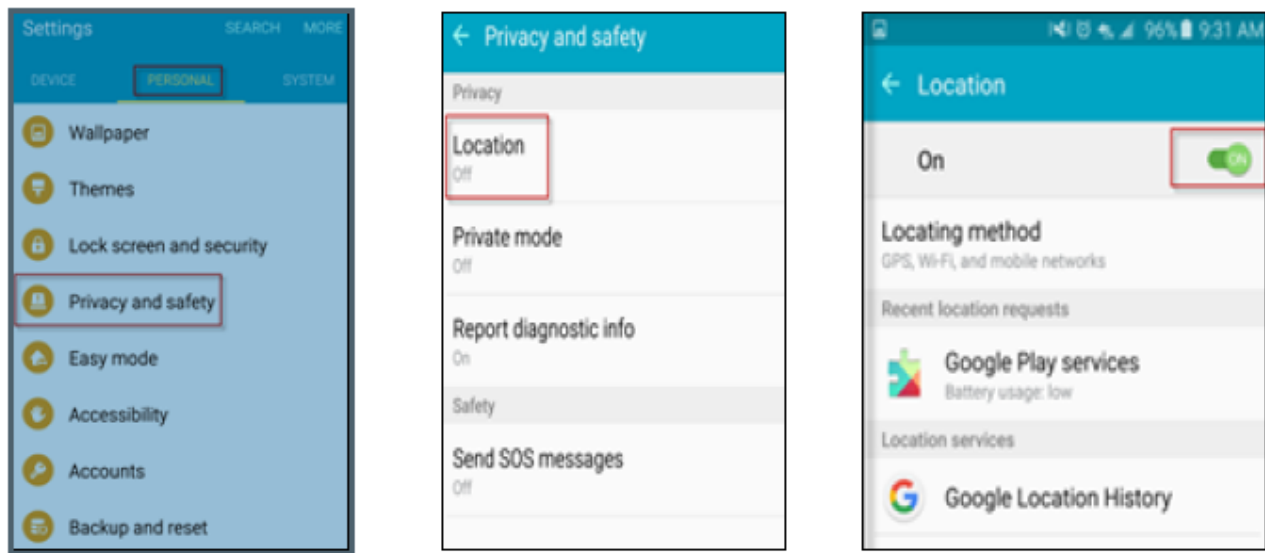


6. When complete, press the main bottom button on the phone and swipe up to close the **Settings** application. The phone will default back to the main screen. Your Location Services is now on.

To turn on Location Services for an **Android** phone:

1. On the top of the main screen, press and swipe down and press **Settings**.
2. Scroll down and press **Privacy and Safety**.
3. Check to see if Location is set to **On**. If set to On, no action is required. If it is set to Off, proceed to step 4.
4. Press **Location** option and slide the switch to the right. The switch will turn green.
5. When complete, press the main bottom button on the phone and swipe up to close the **Location** application. The phone will default back to the main screen. Your Location Services is now on.

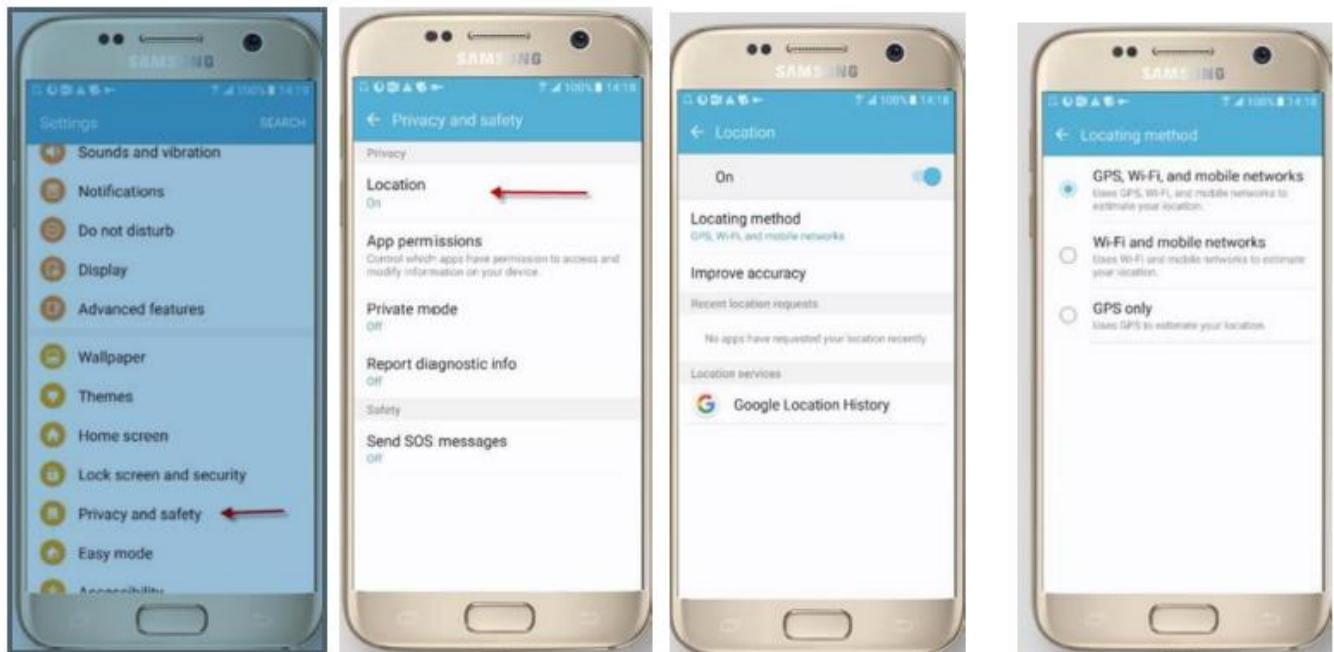
When complete, the phone defaults back to the main screen.



Late model Samsung phones have certain settings that can increase the reliability and accuracy of GPS. Samples shown are for a galaxy S7, but a galaxy s8 will have similar settings.

To turn on Location Services for a **Samsung** phone:

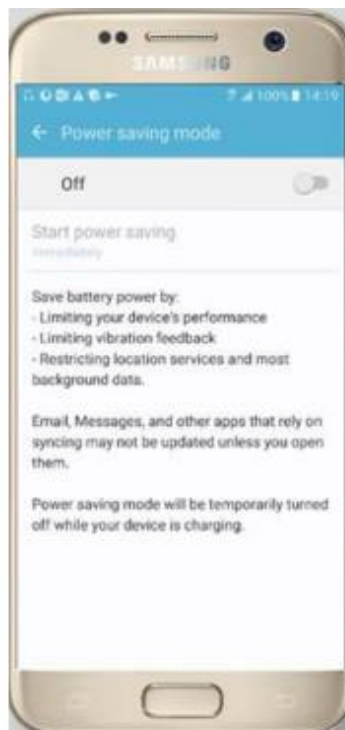
1. On the top of the main screen, press and swipe down and press **Settings** then press **Privacy and safety**.
2. Press **Location** and slide the switch to turn **Locating method** and **Improved accuracy** features on.



3. Verify that all location settings are turned on.



4. Verify that low power saving mode is not turned on. Go to **Settings**, and search for “**power**”. Turn off **Ultra power saving mode** and **Power saving mode**.




Note: Using the device in either of those modes can severely limit the ability of the GPS feature to work properly.

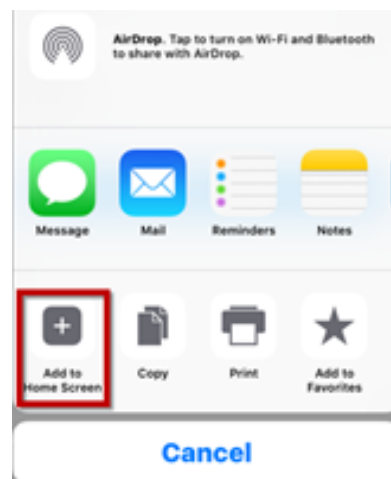
5. Verify the power settings are set as describe above.

Setting up Matrixcare Mobile as Home Page

On the phone, look for the following buttons or description to add the MatrixCare Mobile application to your Home page.

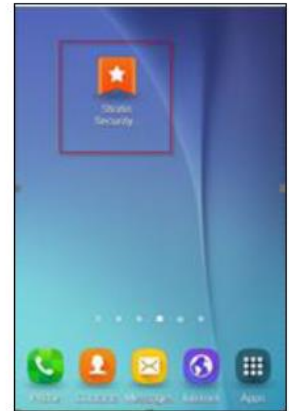
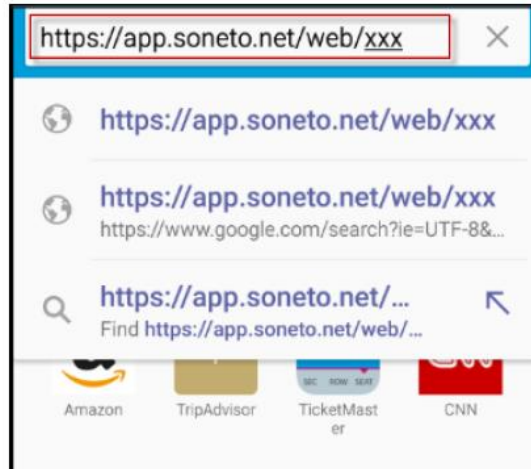
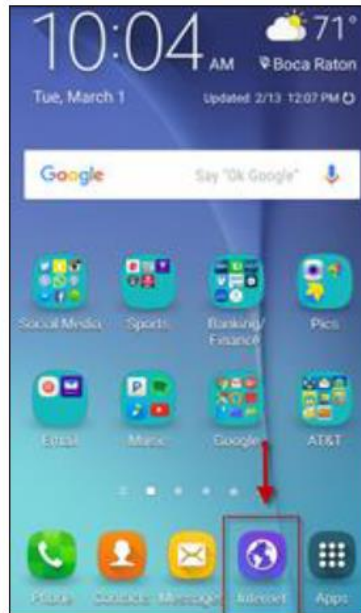
To set up the MatrixCare home page for an **Apple iPhone**:

1. On an Apple iPhone, in the web app main page, browse the MatrixCare Home Care home page (<https://app.soneto.net/web/FamilyAndNursingCare>) and press the  button on the bottom of the page.
2. The MatrixCare Mobile application will now be your home page.



To set up the home page for an **Android** phone:

1. On an Android phone, in the web app main menu, press the **Internet** button.
2. Browse the MatrixCare Home Care home page (<https://app.soneto.net/web/FamilyAndNursingCare>).
3. Press **More** on the top right of the page.
4. Press **Add to Home Screen** or select the **Settings** button on the top right of the page and press **Add to Home Screen**.



5. A short cut is added to the Home page.

Note: Websites such as Google.com and Youtube.com are helpful resources for determining how to enable location services or adding a home page on mobile devices that may not be mentioned in this guide.

Registration Invite Email

A registration invite email will be sent to the email Select has on file. This registration email should be opened on the mobile phone that you will check emails and receive texts.

Click the link in the body of the email.

You have been invited to use MatrixCare Mobile. Please click this link to setup your account:

<https://api.soneto.net/2.52.101.0/FamilyAndNursingCare/UserAdmin/Register/8eaf5da7-eda3-494a-a46f-eb48c3c8dcc6>

Having trouble? Just copy and paste this link into your browser.

If you need more information or received this email in error please contact:

Select

1010 Wayne Avenue

Silver Spring, MD 20910

(301) 587-9600

Verification

The Verification will open in a page on the mobile phone's browser. Press the "Send Verification" button. This will send a text message to your phone with a verification code.



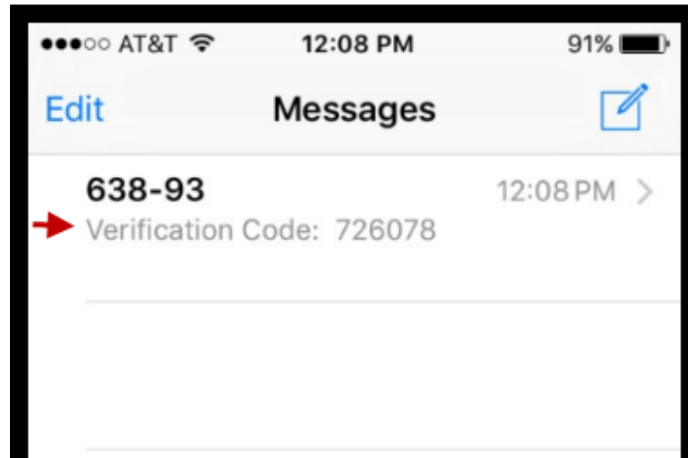
Welcome to MatrixCare Mobile

Verify Your Identity

Before you can enroll, we need to verify your identity.
Click the 'Send Verification' button below to send a text message to your phone ending in **60**

Send Verification

Check unread text messages on your phone.



Go back to the Verification page on your phone and enter the Verification Code and press **Confirm**.

Verify Your Identity

Before you can enroll, we need to verify your identity.
Click the 'Send Verification' button below to send a text message to your phone ending in **41**.

Send Verification

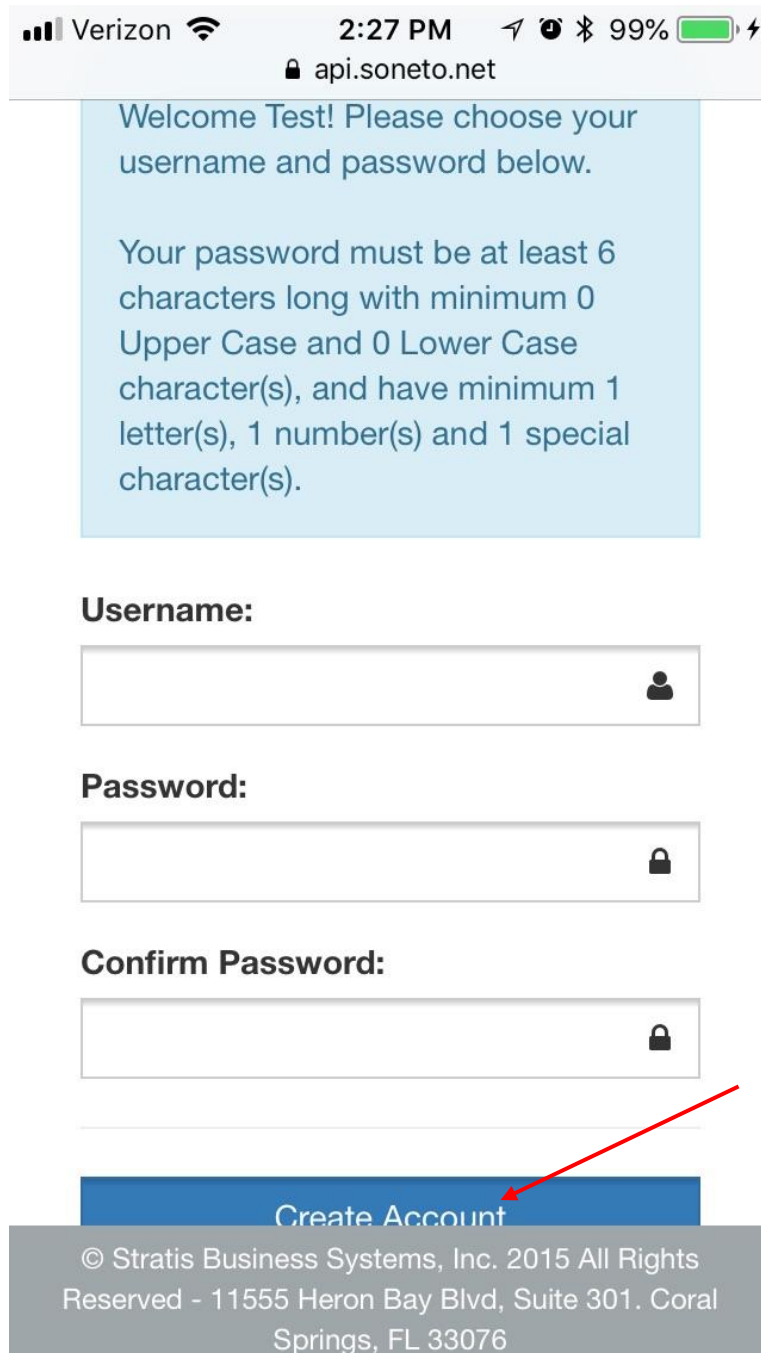
Text message sent successfully! When you receive it, enter the code into the box below and click 'Confirm' (it may take a few minutes for the text to arrive)

Enter the verification code

Confirm

Create Username and Password

- Create a username and password that is easy to remember, but falls within the following password rules:
 - Must be at least 6 characters long
 - Minimum of 1 letter, 1 number and 1 special character
- Click Create Account once complete



The screenshot shows a mobile app interface for creating a username and password. At the top, the status bar displays 'Verizon', signal strength, Wi-Fi, time '2:27 PM', location, alarm, Bluetooth, and battery '99%'. Below the status bar, the URL 'api.soneto.net' is shown. A light blue box contains the following text: 'Welcome Test! Please choose your username and password below.' and 'Your password must be at least 6 characters long with minimum 0 Upper Case and 0 Lower Case character(s), and have minimum 1 letter(s), 1 number(s) and 1 special character(s)'. Below this box, there are three input fields: 'Username:' with a person icon, 'Password:' with a lock icon, and 'Confirm Password:' with a lock icon. A red arrow points to a blue 'Create Account' button. At the bottom, a grey footer contains the copyright notice: '© Stratis Business Systems, Inc. 2015 All Rights Reserved - 11555 Heron Bay Blvd, Suite 301. Coral Springs, FL 33076'.

Verizon 2:27 PM 99% api.soneto.net

Welcome Test! Please choose your username and password below.

Your password must be at least 6 characters long with minimum 0 Upper Case and 0 Lower Case character(s), and have minimum 1 letter(s), 1 number(s) and 1 special character(s).

Username:

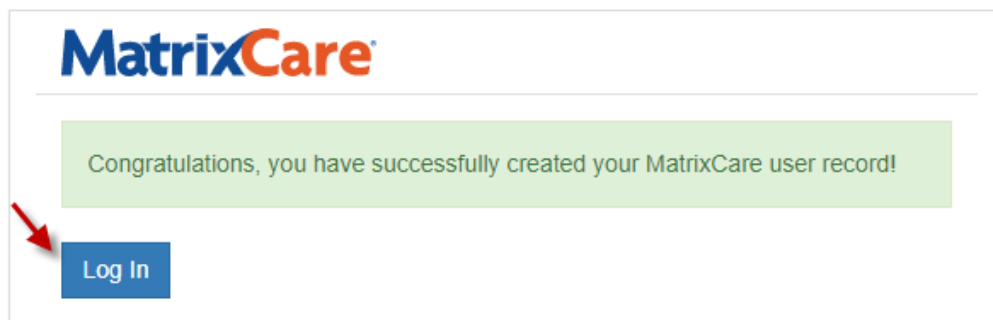
Password:

Confirm Password:

Create Account

© Stratis Business Systems, Inc. 2015 All Rights Reserved - 11555 Heron Bay Blvd, Suite 301. Coral Springs, FL 33076

Once you've successfully completed the setup, the following box will appear.



Click Log In.

Accept EULA

Review and accept the End User License Agreement.

Please Accept Our EULA

Terms and Conditions of Use

User Agreement

Stratis Business Systems (hereafter "Stratis") provides the MatrixCareCarePortal (hereafter the "Portal"), in both free and premium formats, as a service to its home care provider customers (hereafter "Agency"), their caregivers, clients, patients and family members. The Portal allows these entities to view information about services to be provided including, among other things, home visitations, scheduling, billing and patient health records ("PHR"). By using the Portal, you signify your assent to these Terms and Conditions of Use. If you do not agree to these Terms and Conditions of Use, you should not use this Site.

Rights to Modify and Amend the Portal Stratis reserves the right to modify or amend the Portal at

Questions, Complaints and Contacts

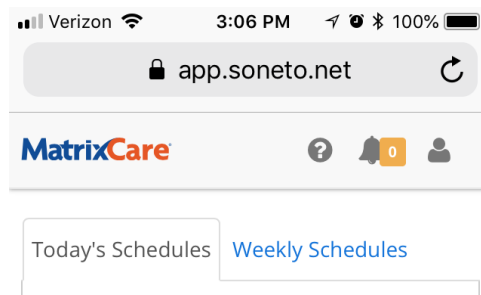
If you have any questions about this Policy, or any other aspects of your privacy, please contact your Agency which provided you with access to the Site or Portal.

☒ **Yes, I Accept the MatrixCare Site Terms and Conditions**

Continue


Scroll down and press to enter a check in the **Yes** box and press **Continue**.

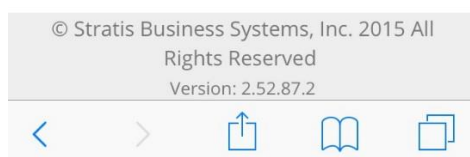
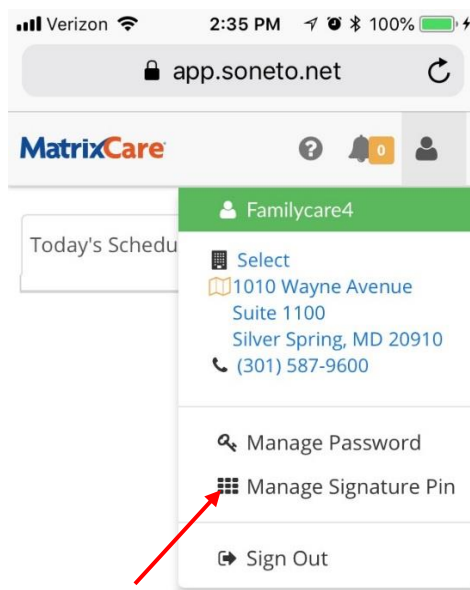
The MatrixCare Home Care Mobile Home Page opens.



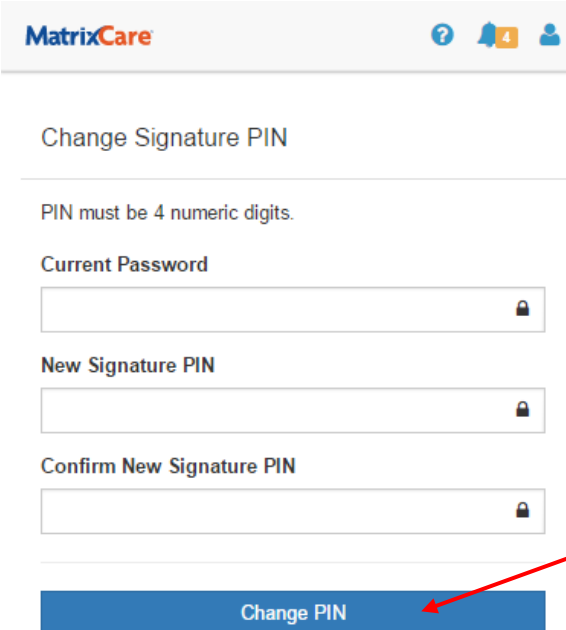
Create Signature PIN

To Create a Signature PIN:

1. Press the **Account Settings** button  on the tool bar then press **Manage Signature PIN**.



2. Enter your current MatrixCare password (created when your username was created), a **4-digit PIN** and confirm it, and press **Change PIN**.



The image shows a web form titled "Change Signature PIN" from MatrixCare. At the top, there is a header bar with the MatrixCare logo on the left and three icons (a question mark, a bell with the number 4, and a user profile) on the right. Below the header, the title "Change Signature PIN" is centered. A note states "PIN must be 4 numeric digits." The form contains three input fields, each with a lock icon on the right: "Current Password", "New Signature PIN", and "Confirm New Signature PIN". At the bottom of the form is a blue button labeled "Change PIN". A red arrow points to this button from the right side of the page.

MatrixCare

Change Signature PIN

PIN must be 4 numeric digits.

Current Password

New Signature PIN


Confirm New Signature PIN

Change PIN


Signing in to Matrixcare Mobile Application

To sign in to the MatrixCare Home Care Mobile application:


1. On your phone, access the **MatrixCare Home Care URL** that you previously bookmarked,
<https://app.soneto.net/web/FamilyAndNursingCare>
2. On the Sign in page, enter your **Username** and **Password**.
3. Press **Sign In**.




Username:







Password:



Tenant:



The following information is a brief overview of the MatrixCare Home Care Mobile application. The main features in this application include:

-  - Pressing the MatrixCare home logo returns you to the Today's Schedules page.
-  **Help** - Pressing the question mark provides a quick tour of main functions on each page of the application.
-  **Notifications** - Pressing the bell displays a dropdown menu that allows you to view notifications sent to you by Select such as documents that are going to be expiring or updates about company-wide events such as caregiver parties. It also shows the number of notifications that are pending.
-  **Account Settings** - Pressing the person displays a dropdown menu that allows you to view your Select's office information, change your password or digital signature password, and log out of the system.
- **Schedules** - When logging in or pressing the MatrixCare logo, a list of clients you are scheduled to visit today appear. Press on a schedule to view more detail, and to check in and check out. Weekly Schedules display a list of clients that you are scheduled to visit this week, past week, or future weeks that are prescheduled.

Checking in at the Client Location

After arriving at the client's location, you are ready to begin the check in process. The MatrixCare Home Care mobile application will verify your location.

To begin your client visit:

1. Press **Check In**. This will record your GPS location and the date and time you arrived (**you must enable location services for the GPS verification to work**).

Note: The MatrixCare Home Care mobile application knows your location. If the application does not know your location a message appears requesting, you to allow the application to know your current location. Press **Allow** to complete the location process on your phone. You may attempt to check in again to get a better location reading using **Retry Check In**. When your location is correct, the record will update successfully.

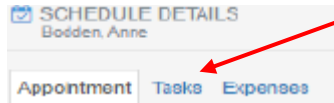
The screenshot shows the MatrixCare mobile application interface. At the top is the MatrixCare logo and a navigation bar with icons for help, notifications, and user profile. Below the header is a section titled 'SCHEDULE DETAILS' for 'Bodden, Anne'. There are three tabs: 'Appointment' (selected), 'Tasks', and 'Expenses'. Under the 'Appointment' tab, there is a section for 'APPOINTMENT DETAILS' containing the client's name, address (11555 Heron Bay Blvd, Apt 301, Coral Springs, FL 33321), and phone number ((305) 661-5569). Below this, the start and end times are listed: Start Time: 2/1/17 8:00 AM, End Time: 2/1/17 9:45 AM (1.75 Hrs). There are fields for 'Check In:' and 'Check Out:'. A large blue button labeled 'Check In' is prominently displayed. Below this, the service status is 'Scheduled' and the service code is 'HHA'. The office information is 'NextGen of Palm Beach County' with phone number '(561) 447-7111'. A note from the client record states 'The gate number is 4321'. At the bottom right is a 'Save' button.

This screenshot shows the same MatrixCare mobile application interface, but after the initial check-in attempt. The 'Appointment' tab is still selected. The appointment details are the same. However, the start and end times are now: Start Time: 2/1/17 8:00 AM, End Time: 2/1/17 9:45 AM (1.75 Hrs). The 'Check In:' field now shows '2/1/17 9:31 AM'. The 'Check Out:' field is empty. A yellow warning box appears with the text 'Check in recorded' and 'Location Not Accurate Enough'. Below this, there are two blue buttons: 'Retry Check In' and 'Check Out'. The service status, service code, office information, and client note remain the same as in the previous screenshot.

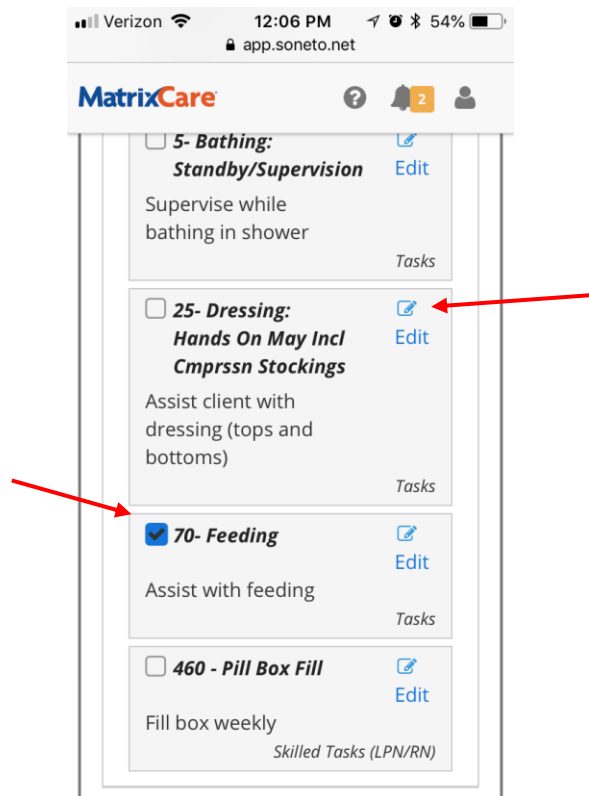
Entering Client Tasks

To view a list of tasks that you have been assigned to perform on this visit:

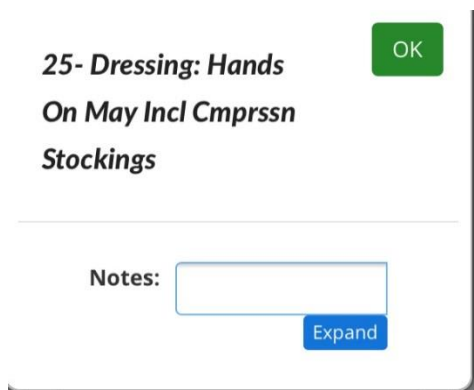
1. Press the **Tasks** tab.



2. When tasks are successfully completed, press each task to check them off as they are completed.



Press **Edit** to enter any notes as necessary and press **OK**.

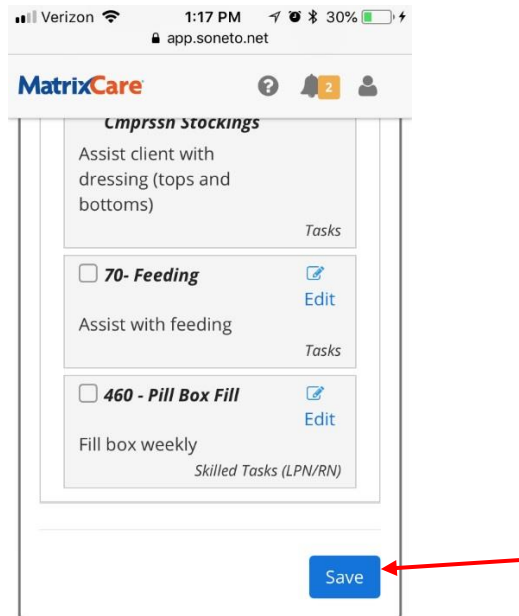


To add more detail, click the **Expand** button. Click **OK** to complete and close the notes window.

Note: If the task was refused by the client, leave the task unchecked. For example, you can press **Edit** in the notes section to indicate “**Client Refused**” and press **OK**.

If a task you've performed isn't listed under Tasks, please call the office to report.

3. Scroll down to the bottom of the page and press **Save**.



Couple Care Clients

For any couple care clients, you must check in and out and report tasks for both Mr. and Mrs. for each shift.

Live-In Clients

For any live-in clients, you must check in and out and report tasks each day. On the first day or after returning from time off, you will check in when you arrive. The following day, you will check out and report tasks for that shift (24 hours) right before the start of your next shift (1-2 minutes). You will continue to check in/out and report tasks until your next time off or the case ends.

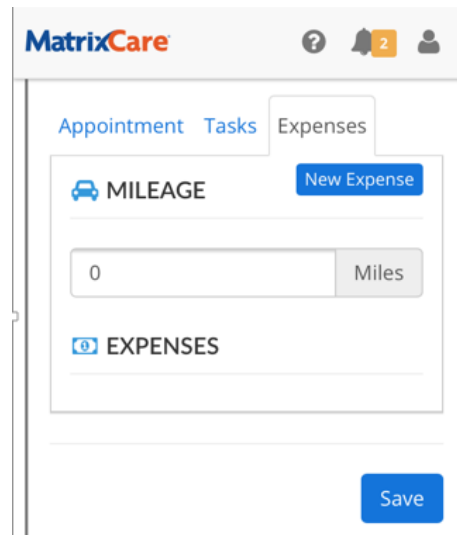
Entering Mileage and Parking

To enter mileage and/or parking expenses you may have incurred during the client visit:

1. On the Schedule Details page, press the **Expenses** tab. Add mileage incurred during your visit with the client.
2. If there was a parking expense, press **New Expense** and select parking from the drop-down list and enter the amount or parking expense incurred.

Expenses can be deleted by pressing on the red delete icon to the right of the expense description. A confirmation message appears for you to continue or cancel.

3. Press **Save** to complete your expenses.

The screenshot shows the MatrixCare mobile application interface. At the top, there's a header with the MatrixCare logo, a help icon, a notification bell with a '2' badge, and a user profile icon. Below the header, there are three tabs: 'Appointment', 'Tasks', and 'Expenses'. The 'Expenses' tab is currently selected. Under the 'Expenses' tab, there are two main sections. The first section is labeled 'MILEAGE' with a car icon and a 'New Expense' button. Below this, there is a text input field containing the number '0' and a 'Miles' label. The second section is labeled 'EXPENSES' with a dollar sign icon. At the bottom right of the screen, there is a blue 'Save' button.

Note: If you provide transportation on a couple care case, only submit mileage and or parking for 1 client, not both!

Checking Out of the Client Location

After all tasks and reporting notes are complete and sufficient scheduled time has gone by, you are now ready to complete the checkout process.

To begin the checkout process:

1. Press the **Appointment** Tab, scroll down and press **Check Out**.

Start Time: 6/12/18 8:00 AM

End Time: 6/12/18 11:00 AM



(3.00 Hrs)


Check In: 6/12/18 11:58 AM


Check Out:


⌂ Check Out


2. A Visit Summary shows the following information during your client visit:


- Client name
- Task completed with a green checkmark  (uncompleted task will show a red ) You have the option to go back to the task list and check off an item you may have missed by pressing **Back**.
- List of expenses by mileage/parking occurred during the client visit.


 VISIT SUMMARY
Bodden, Anne

 TASKS

 Bathing - Tub/Shower

 Wash Hair

 Comb/Brush Hair

 EXPENSES

12 Miles

No Expenses

Back

Next

3. Press **Next**

4. The Visit Summary Review page displays showing your GPS location results status. You must certify the visit time is accurate by reviewing the Check In and Check Out times. Press **Yes** or **No** to certify the visit times.

VISIT SUMMARY
Bodden, Anne

☒ **LOCATION**

Location Verified

☒ **CERTIFY VISIT TIME**

Check In: 3:49 PM Check Out: 3:58 PM

I certify the visit times are accurate:

Notes:

Forgot to check in

Override Times:

Check In: 3:30 PM 1/30/17 3:30 PM Check Out: 3:58 PM 1/30/17 3:58 PM

- If the visit times are accurate, press **Yes**. The Notes field is optional. Press **Next** to continue the check out.
- If the visit times are not accurate, press **No**. The Notes field and at least one of the Override Time field is required to be filled in before continuing to complete the visit.
 - In the Notes field, the caregiver is required to explain why they answered No.
 - The caregiver is required to enter an Override Time for the Check In and/or Check Out field.
 - The **Next** button will not be enabled until the required fields are entered.

Important! The Check In and Check Out clock time picker can be different depending on the user interface of your device.

5. Press Next.
6. Enter your 4-digit Caregiver PIN.

Note: If you forgot your caregiver PIN, press **Skip** or contact Select for authorization options.

VISIT SUMMARY
Bodden, Anne

☒ **VISIT TIME**

Check In: 3:30 PM Check Out: 3:58 PM

☒ **CAREGIVER PIN**

PIN:

.....

Back Skip Next

7. Press Next
8. Press Skip when asked to obtain client signature.
9. Press **Complete** to record the checkout.

VISIT SUMMARY
Client, Ms. Our

☒ **VISIT REVIEW**

✓ Location Verified

⚠ The client has declined to sign this visit sheet.

Back Complete

Note: Check out times that were not overwritten will continue to increment until Complete is pressed. Override times will not keep incrementing.

10. A message displays stating Record Created Successfully and you have successfully checked out. Press **Home** to return back to the Home page or you can now sign out of the mobile application.

MatrixCare

✓ Record Created Successfully

VISIT SUMMARY
Bodden, Anne


☒ **VISIT COMPLETED!**

You have successfully checked out.

Home

Signing out of the Mobile Application

To sign out of the MatrixCare Home Care Mobile application:

1. Press the **Account Settings**  button on the tool bar.
2. Press **Sign Out**. A confirmation prompt appears allowing you to press Yes or Cancel. Press **Yes** to sign out.
3. The Signed Out page appears with a link to return back to the MatrixCare Mobile application. The sign out is complete.
4. Close the web app by pressing the **X** in the top right corner of the page.

Signed Out

Click the link below to return to MatrixCare

<https://test-app.soneto.net/web>

NOTE: We strongly advise all caregivers to set a passcode on their device.