FAX

Date:	01/22/2026

Pages including cover sheet:	12

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NOTE:

Special Programs

CareAxis User Manual Guide

1. CareAxis

1.1 CareAxis

CareAxis is a SaaS platform that streamlines operations for the senior affordable housing sector in the United States. It provides a centralized system to support day-to-day housing management, ensure HUD compliance, and improve coordination with healthcare providers.

The platform reduces manual work, improves data accuracy, and connects workflows across property staff, compliance teams, and care partners. With a user-friendly interface, CareAxis enables efficient management of core features such as Admin sections (Organization, Users, and Templates), Client, Service Provider, Communication, Reports, Analytics, and Events Scheduling, ensuring consistent data and smooth navigation across all modules.

1.2 Roles

CareAxis uses a role-based access control system to ensure users have access only to the features and data relevant to their responsibilities.

Roles	Description	User Manual
Super Admin and Admin Users	• **Super Admin** ◦ Manages multiple organizations, global system configurations, and service providers ◦ Assigns organization-level administrators and manages users, roles, and permissions ◦ Creates and edits workflows, handles completed work, and configures external setups ◦ Generates reports and creates template responses for forms and assessments ◦ Sets up and maintains properties and units ◦ Oversees operational workflows and ensures system and regulatory compliance	Super Admin & Admin User Manual

	• **Admin Users**
	  ◦ Can only view templates.
	  ◦ Cannot delete or create an organization.
	  ◦ Cannot disable or enable or block organization.	

Care Coordinator & QA Users	• Accesses all toolbar functions, except adding users, templates, or forms • Can be assigned to and manage multiple properties • Edits assigned property information and related records • Coordinates resident care and service plans • Manages case notes, assessments, referrals, and client documentation • Handles day-to-day client management activities • Edits and adds notes for assigned staff • Oversees data quality, compliance, and audit trails • Manages templates, integrations, and enforces workflow standards	Care Coordinator & QA User Manual

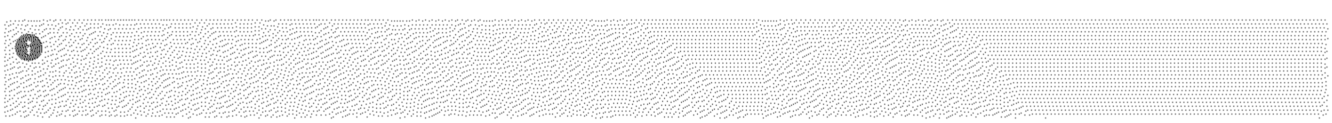
1.3 Goal and Target Users

The **CareAxis User Manual** provides step-by-step guidance for navigating and using the platform efficiently. It covers key modules, features, and workflows, helping users manage clients, properties, service providers, and organizational operations. Designed for clarity and ease of use, this manual ensures that staff, administrators, and care coordinators can quickly access the tools and information they need to perform their tasks accurately and effectively.

1.4 System Requirements and Supported Platforms

- Modern browser: latest Chrome, Edge, Firefox, or Safari
- Network: stable broadband or LTE/5G for telehealth and syncing

1.5 Care Axis Navigation Model



Care Axis uses a hybrid navigation model that combines multiple navigation paradigms to optimize usability and accessibility:

1. **Global Top Bar**: Includes only Profile (Profile Settings, Change Password, and Logout) and Theme change (Dark and Light Mode) options.
2. **Page Wise Search bar and Add buttons** for specific modules. Visit each module to add a client, user, organization, templates, or service provider and make use of the search bar feature to access specific data directly.
3. **Left Sidebar (Primary)**: Provides access to main modules such as Clients, Schedule events, Admin Modules, Service Provider, Communication, Reports, Analytics, and Account Settings.
4. **Step Navigation**: For forms in organization, user, client, and other creation processes, "step-based navigation" guides users through sequential stages, ensuring all required information is completed.
5. **Tab-Based Navigation**: Users can switch between views using tabs at the top of the page, allowing quick access to specific sections.

Why Care Axis Uses a Hybrid Model:

By combining, Care Axis balances discoverability, efficiency, and context-awareness, making it easier for users to navigate complex healthcare workflows without feeling lost.

2. Getting Started

2.1 Navigating the CareAxis System

This section explains how to move around in the CareAxis platform and find the information you need quickly.

1. **User Onboarding & Authentication**
   a. **Account Creation**
      i. The Administrator of CareAxis creates a new Super Admin account.
      ii. The Administrator provides the new Super Admin with an **assigned email** and **temporary password**.
   b. **Login**
      i. Open the **CareAxis login page**.
      ii. Enter the **provided email** and **temporary password**.
      iii. Click **Login**.
   c. **Password Reset**
      i. If you forget your password, click the **"Forgot Password"** link on the login page.

ii. Enter your **registered email address**.

iii. Follow the instructions sent to your email to **reset your password** and regain access.

2. **Dashboard & Role-Based Access**
   a. **Super Admin**
      i. Has **full access to all modules** in the system.
   b. **Admin Users**
      i. All toolbar functions but no rights to add organization, users, templates and forms in platform.
   c. **Care Coordinators**
      i. **No access to Admin modules.**
   d. **QA (Quality Assurance)**
      i. **No access to Admin modules.**
3. **Organization & Property Management**
   a. In the **Organization Module**, users can:
      i. Add or delete organizations within the system.
      ii. Add properties under each organization.
      iii. Add units to each property for detailed management.
      iv. Manage organizations and properties, including editing details and settings.
      v. Assign care coordinators to each property.
      vi. User **3-Dot Action Menu** - Access to additional options and actions for managing an organization.
         1. Add Property
         2. Update Address
         3. Block/Disable Organization
         4. Delete Organization

> To access more details from this feature, go to the following link. Organization and Property Management

4. **User Management**
   a. In the **User Module**, users can:
      i. **Add User:** Provide the following information to Add User
         1. **Basic Information** - Collects essential personal details required to identify and create a user profile.
         2. **Organization & Permissions** - Assign the user to a specific Organization and Property, and define their Role within the system.

3. **Address** - The physical location information associated with the user, including street, city, state, and ZIP code.
4. **Emergency Contact** - Record the details of a person to be contacted in case of an emergency.
5. **Training Link** - Add and manage training resources by providing a title and a link.
6. **ID & Password** - Create ID & Password

ii. User can be assigned to an Organization and it's associated Properties.

iii. Set User Role: Admin, QA, or Care Coordinator.

b. **Edit User** - Update an existing user's information, such as name, contact details, or assigned roles.

c. **Upload CSV** - Bulk-import multiple users by uploading a properly formatted CSV file.

d. **User 3-Dot Action Menu** - Access to additional options and actions for managing a user.

i. Update Property/Role

ii. Update Address

iii. Block/Disable User

iv. Delete User

To access more details from this feature, go to the following link. User Management

5. **Templates** - CareAxis templates are used to standardize data entry and workflows across the platform. They ensure consistency, accuracy, and compliance when documenting client care and communication.

a. **Enrollments**
Define standardized enrollment forms used to register clients into programs or service plans.

b. **Assessments**
Provide structured formats for evaluating client risks, needs, and conditions.

c. **Case Notes**
Standardize documentation of client interactions, events, and observations.

d. **Communications**
Create reusable templates for consistent messaging with clients and service providers.

e. **Needs**
Define common client needs to support structured service planning.

f. **Goals**
Establish measurable objectives linked to identified client needs.

g. **Interventions**

Outline actions or services provided to address client needs and goals.

h. **Outcomes**

Capture results and progress achieved through interventions.

To access more details from this feature, go to the following link. Templates Managemen t

6. **Client Management**

a. **Add Client**

i. Provide the following information to Add Client

1. **Basic Information** - Provide essential details required to identify and create a client profile.
2. **Property Information** - Assign and set organization details and property information.
3. **Address** - The physical location information associated with the client, including street, city, state, and ZIP code.
4. **Additional Information** - Include details such as race, marital status, etc.
5. **Emergency Contact** - Record the details of a person to be contacted in case of an emergency.
6. **Health Care Coverage** details of the client.
7. **Primary Care Physician** details of the client.
8. **Pharmacy Information** associated to the client.
9. **Medication details** of the client.
10. **Allergies** - Medication and Allergy information of the client.
11. **Income Details**
12. **Expense Details**

b. **Edit Client** - Update an existing client's information.

c. **Upload CSV** - Bulk-import multiple users by uploading a properly formatted CSV file.

d. **User 3-Dot Action Menu** - Access to additional options and actions for managing a client.

i. Add New Enrollment

ii. Update Property

iii. Delete Profile

e. Manage **Service Plan Details**

i. Add Enrollments, Add Needs, Add Goals, Add Intervention, and Add Outcome.

f. Add **Case Notes, Assessments**, **Fax**, **Communication** and **Document Details**.

g. **Client Status** - Indicates the client's current participation and enrollment state in the system:
   - **Active:** Client is currently enrolled and receiving services.
   - **Transferred:** Client has been moved to another property or organization.
   - **On Hold:** Client services are temporarily paused.
   - **Disenrolled:** Client is no longer enrolled in services.
   - **Non-Participating:** Client is registered but not actively participating in services.

h. **Overview of Client Details**
   - Includes the **Clients Information** including Emergency Contact, Health Care Coverage, Primary Care Physician, Pharmacy Information, Income Details, and other details saved during registration process.
   - **Service Plan Summary Details** which shows **"Service Plan Status"**, **"Total Active Days"**, "**Active Enrollments"**, and "**Started on Date"** which is the oldest date of the active enrollment.

i. **Scheduled Events logs and Events Calendar -** Displays scheduled events with notification icons in the **Calendar** and **Events Logs**, and provides an **Add** Schedule button for creating new events.

> To access more details from this feature, go to the following link. Client Management

7. **Schedule Management**

The **Schedule** module helps users manage client-related activities by timeline, ensuring timely follow-up. Users can also **schedule events** to plan client activities such as assessments, case notes, service plan reviews, and reminders.

- It includes **Current** tasks needing immediate action,
- **Upcoming** scheduled tasks, and
- **Past** completed or expired tasks for reference.

> To access more details from this feature, go to the following link. Schedule Managemen t

8. **Service Provider Management**

a. **Add Service Provider** - Provide the following information to Add Service Provider

   i. **Basic Information** - Provide essential details required to identify and create a service provider profile.

      1. The services rendered by a service provider are listed in the **Need catergory** dropdown which allows the user to select multiple need categories to associate with a

service provider record.

ii. **Contact Person** - Record the details of a person to be contacted in case of an emergency.

iii. **Property** - Select the Property that requires the specific service to be provided.

b. **Edit Service Provider**

c. **Upload CSV** - Bulk-import multiple Service Providers by uploading a properly formatted CSV file.

d. **User 3-Dot Action Menu** - Access to additional options and actions for managing a Service Provider.

i. Add Contact Person

ii. Update Need Type

iii. Block/Disable Provider

iv. Delete Provider

> To access more details from this feature, go to the following link. Service Provider Management

9. **Communication**

a. **Fax**

i. **Send New Faxes:** Allows users to send documents directly from CareAxis to external fax numbers or Service Providers.

ii. **View Inbound and Outbound Fax History:** Displays a record of all received and sent faxes for tracking and reference.

iii. **Download Fax Documents:** Enables users to download faxed files for local storage or review.

iv. **Add Comments:** Allows users to add notes to faxes for documentation, follow-up, and audit purposes.

v. **Track Fax Delivery Status:** Shows the current status of each fax (e.g., pending, successful, or failed) to confirm delivery.

> To access more details from this feature, go to the following link. Communication Management

10. **Report**

The **Reports** module provides access to standard system-generated reports that support operational monitoring, compliance tracking, and data analysis. Authorized users can generate predefined reports to review client outcomes, assessment statuses, participation metrics, and HUD-related data.

Standard Reports Section

The **Standard Reports** tab displays a list of available system-generated reports. Each report includes:

- **Report Name** - Identifies the type of data included (e.g., ADL, IADL, GAD-7 & PHQ-9, Assessment Status).
- **Description** - Provides a brief explanation of the report content (if available).
- **Action** - Allows users to generate the selected report.

To access more details from this feature, go to the following link. Reports Management

11. **Analytics**

Provides data-driven insights into resident health risks across organizations and properties.

Visual Analytics

- Risk Score Distribution
- Risk Level Breakdown
- Average Risk Score by Property
- Risk Level by Property Type
- Risk Score by Age Group
- Risk by Gender
- Risk Score Ranges
- Assessments by Staff Member
- High-Risk Residents (Top 10)
- Population Risk Meter

To access more details from this feature, go to the following link. Analytics

12. **User Profile** - Navigate and click the User Profile at the top-right corner of the Dashboard to access the following actions:
    a. **My Profile** Details
    b. **Change Password**
    c. **Logout** Button

To access more details from this feature, go to the following link. Account Settings

3. Troubleshooting and Support

⚠ If you experience any issues, try the following solutions before contacting support.

3.1 Common Issues and Solutions

1. **Unable to log in:** Ensure you're using the correct email and password.
2. **Can't see a module:** Check your role permissions or contact support.
3. **Missing action button:** Ensure an item is selected and you have edit rights; look under the ••• menu for secondary actions.
4. **Sidebar collapsed:** Expand the left sidebar to reveal hidden modules or icons.
5. **Slow loading of modules:** Clear browser cache, check internet connection, or try a different browser.

3.2 Contacting Support

⚠ Contact information for accessing support, including email addresses and phone numbers.

4. FAQs

How do I reset my password?

Select Forgot Password on the login page and follow the link sent to your email.

What actions are available in the Users section

You can add users, update roles and permissions, edit user details, block/disable users, or delete users based on access rights.

Do changes made in the Admin Modules apply immediately?

Yes. Most changes take effect immediately and impact users, workflows, or documentation accordingly.

Can I disable an organization without deleting its data?

Yes. Organizations can be blocked or disabled, which retains all data for audit and reference purposes.

Why are templates restricted to certain roles?

Templates control standardized workflows and documentation, so access is limited to prevent inconsistent data entry.

5. Appendix

5.1 Related Resources

https://careaxis.atlassian.net/wiki/spaces/CA/pages/97189948/Admin+Modules

https://careaxis.atlassian.net/wiki/spaces/CA/pages/97845249/Client+Management

https://careaxis.atlassian.net/wiki/spaces/CA/pages/97189955/Service+Provider+Management

5.2 Change Log History

Date	Version	Author	Descriptions
Dec 17, 2025	1.0.0	Donna Gumapac	User Manual primary sections
Dec 21, 2025	1.0.1	Donna Gumapac	Revisions
Dec 22, 2025	1.0.2	Donna Gumapac	Client Section Updates
Dec 26, 2025	1.0.3	Donna Gumapac	Templates Updates
Dec 29, 2025	1.0.4	Donna Gumapac	Revisions