

Client and Family Portal

A free, secure, and dedicated family access portal that keeps everyone informed.

The screenshot displays the CareSmartz360 Client and Family Portal interface. The main section is titled "Schedule(s)" and shows a calendar view for January 2022. The calendar is organized by day (Sunday through Thursday) and time slots (5:00PM-11:00PM). Each slot is color-coded: blue for "15 Minute Medicaid" and green for "15 Minute Medicaid (Pete)". A sidebar on the left contains navigation links: Dashboard, Schedule(s), Invoice(s), Care Plan, and Key Documents. A "MAKE SCHEDULE(S) REQUEST" button is located in the top right corner. Below the calendar, there is a "Care Alerts" section with tabs for "Caregiver Notes", "Caregiver Notes for Family", and "Caregiver Task". The "Caregiver Notes for Family" tab is selected, showing a search bar and a table with columns: Status, Caregiver Name, Client Name, Task Subject, and Reason/Notes. To the right of the calendar, an "Invoice(s)" pop-up window is displayed, showing a table of invoices with columns: Invoice #, Due, and Amount (\$). The table lists five invoices with their respective due dates and amounts.

Invoice #	Due	Amount (\$)
INV12642	01/30/2022	\$74.00
INV12625	01/12/2022	\$58.00
INV12626	01/12/2022	\$58.00
INV12620	01/12/2022	\$162.00
INV12621	01/12/2022	\$162.00

One Dashboard. Complete Visibility.

The Client & Family Portal gives families instant access to care schedules, invoices, care plans, and important updates, all from one centralized dashboard. Accessible anytime, from any device, the portal improves transparency while reducing back-and-forth communication with your home care agency.



Track Schedules & Care Plans

Provide clear visibility into daily, weekly, and monthly visits. Families can review caregiver details, care notes, ADLs, and care plans—ensuring everyone stays aligned on care delivery.



Real-Time Visit & Task Monitoring

View completed care logs & active shifts in real time, including caregiver task updates & voice notes. Maintain documentation clarity without additional phone calls.



View Billing & Payment History

Allow clients and families to review invoices, track payment status, and make secure payments directly through the portal—supporting faster collections and improved cash flow.



Caregiver Feedback & Visit Confirmation

Enable electronic visit confirmations with digital signatures, streamline communication, and collect feedback on service quality—all within a secure environment.



Update Changing Care Needs

Reduce administrative calls by allowing families to notify your agency of changing care requirements or upload updated documents directly through the portal.



Secure & HIPAA-Compliant

Built with HIPAA-compliant security standards, the Client & Family Portal protects sensitive data while maintaining secure access controls and reliable performance.

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I love how the software is designed for one to access it from anywhere. It is very compatible with tablets, computers, and smartphones. I thoroughly enjoy how the clock-in/clock-out system and the client portal improve caregivers' and clients' experiences, respectively.



Ashlee Lafavor

Owner, Acare Provider Services

#1 Home care management software to transform the way you provide care.



WHY CareSmartz360?

- APIs for secure integration
- Structured data migration support
- World-class user interface
- Award-winning support; <2 min response time

✉ sales@caresmartz360.com

🌐 www.caresmartz360.com

📞 CALL US NOW
1-844-588-2771