

Every agency runs its own onboarding

Each agency sets its training up once — videos, documents, forms and the credentials it requires — and every caregiver it hires receives that programme automatically. No agency ever sees another's material.

1 Setup per agency, done once	7 Steps every caregiver works through	17 Credential types with expiry tracking	0 Files re-uploaded per candidate
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Three roles

PLATFORM Master admin Creates agencies. Each new agency is stood up with its own workspace, its own first admin, its own office branch — and its own onboarding programme, pre-loaded with the compliance documents a home care agency has to hold anyway.	THE AGENCY Agency admin Runs their own onboarding. Uploads their training videos and policies, decides which credentials they demand, and writes the forms their caregivers sign. Sees only their own agency.	THE HIRE Caregiver or candidate Gets one link — no account, no password. Watches the training, reads the documents, signs the forms, and uploads their licence and health records with expiry dates.
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How it runs

- MASTER ADMIN**
An agency is created
Its workspace, first admin login, primary office and starter onboarding programme are all created at the same moment. Nothing is shared with any other agency.

2

AGENCY ADMIN · ONCE

The agency sets up its programme

In **Onboarding** › **Onboarding Settings**: a welcome video on step 2, the HIPAA policy on step 4, the licences and TB tests it requires, the forms it wants signed. Uploaded once — never again per person.

3

AGENCY ADMIN · PER HIRE

A caregiver is added

Name, email, start date, and which of the five kinds of person they are. The seven steps are built and the agency's whole programme is dropped into them automatically.

4

THE CAREGIVER

They work through their portal

One link, no account. Progress saves as they go and the agency watches it live.

5

AGENCY ADMIN

Documents are verified

Licences and health records are approved, or sent back with a reason the caregiver can see and act on.

6

AUTOMATIC

They become an active caregiver

The caregiver record is created and every credential moves onto it **with its expiry date** — so renewals are tracked from day one and the agency is warned before anything lapses.

What the agency configures

Seven steps. Expand any one of them and add material — that material then appears for every caregiver hired afterwards.

1

Pre-Arrival Preparation

Welcome pack, mentor, equipment and logins

1 document

2

Day 1: Orientation

Tour, mission and values, introductions

1 video

3

Training and Development

EVV app, systems, shadowing

2 videos

4

Compliance and Certification

HIPAA, licence, TB test, background check

6 credentials

5

Role-specific Onboarding

Duties, expectations, check-ins

1 form

6

Benefits and HR Policies

Pay, time off, conduct

1 document

7

Ongoing Support

Follow-ups, wellbeing

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Each step holds four kinds of thing

Training videos

Upload a file, or paste a YouTube or Vimeo link. The caregiver watches it in place and you see who watched it.

Documents

Handbooks and policies they read or download.

Forms

Questions you write, or an uploaded fillable PDF. Completed and signed on screen.

Credentials

Licence, TB test, CPR, background check — uploaded with an expiry date, then verified.

Material can be aimed at one kind of hire

Anything you add applies to everyone, or only to candidates, trainers, contractors or vendors — so a supplier is not asked to complete caregiver training.

How agencies stay separate

Isolation is enforced on every database query automatically, not remembered screen by screen. This was verified by configuring two agencies differently and onboarding candidates into each.

	AGENCY A	AGENCY B
Training video	Its own orientation video	A completely different one
Credential required	TB test	Background check
Form to sign	Its own acknowledgement	Its own acknowledgement
What its candidates received	Only agency A's material	Only agency B's material
Asking for the other's records by ID	Returns nothing	Returns nothing

Also checked

One caregiver's portal link cannot fetch another caregiver's file, and each agency's uploaded material is stored privately and served only through an authorised request — never as a public link.

Why credentials matter here

This is what makes it home care rather than generic onboarding. What a caregiver uploads during onboarding becomes their compliance record.

Caregivers › after activation



State licence

Expires 12 April 2027

valid



TB test

Expires 8 January 2027

valid



CPR certification

Expires 30 June 2027

valid

A caregiver cannot be activated while a required credential is missing, unverified or already expired — so nobody reaches a client's home without their paperwork in order.

Each agency manages its own caregivers, training material and documents independently. Material added to a programme applies to people onboarded from that point onwards; anyone already in progress keeps what they were given.