



## Initial Download & Access

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- ☉ Depending on the type of device – go to the Google Play store (Android) or the App store (Apple) and search “SwyftOps” or “SwyftCG”.
- ☉ Download the SwyftCG App to the device.
- ☉ Open the SwyftCG app, click “I Don’t Have An Account”.
- ☉ Enter the email address that will be used as the username.

NOTE: The email used must match the email that is saved inside of the caregivers SwyftOps profile.

- ☉ An email will be sent to the email address that was registered.
- ☉ Open the email, click the link to set a password for the account.

NOTE: If you do not receive the password set-up email, search your email inbox for the words “Swyft” or “Account Access”. Be sure to check junk/spam folders.

- ☉ Once the password has been set, enter the username and password into the log-in screen of the SwyftCG app, click Login.
- ☉ Location Services and Notifications **must** be turned on with the SwyftCG app.

## Troubleshooting

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- ☉ If the screen after login is blank with a message that says “Select an Office” – contact your office admin team ASAP, they will need to verify the email in SwyftOps vs. what email was registered or possibly need to check the “Uses Mobile App” box in your profile.
- ☉ If a message appears stating the email has already been registered, search your email inbox for the password creation or reset email, search the words “Swyft” or “Account Access”.



## General Menu – Click The Three Lines In Upper Right Corner

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- ☉ “My Schedules” - will display the current schedule; scroll to review all upcoming shifts, click a shift to review shift details. This is also the default view upon login.
- ☉ Open Shifts - displays open shifts available needing a caregiver; click on an open shift to request to work the shift.
- ☉ Notifications - Upcoming shift alerts and expired document alerts will flow here from the SwyftOps admin portal.
- ☉ Messages - Access to the two-way built in messaging system.
  - Click the pencil/box icon to send a new message to the office.
  - To reply to a message, click the message, type in the text area, click Submit to send.
- ☉ Complaints & Grievances - Add any new complaints or grievances or review the progress on any ongoing entries that have been already submitted.
  - Click the pencil/box icon to create a new entry.
  - Click the “Type” box and choose “Complaint” or “Grievance”.
  - Type the text describing the complaint or grievance.
  - Click the check mark in the upper right to submit.
  - Click on any submitted entry to review any progress on the submission.
- ☉ My Profile - click the avatar to upload a photo, add or edit name, address, contact information, and enter any personal characteristics or client preferences.
- ☉ Logout - click this to log out of the SwyftCG App
- ☉ Location toggle - if there are multiple offices being worked, select the correct office by:
  - ☉ Clicking the arrows box at the top of the General Menu Screen.
  - ☉ Choose the correct office from the “Select Your Office” screen.

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## Working A Shift

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- ☉ From the “My Schedules” screen, click the shift that needs to be worked.
- ☉ For directions – click the pinpoint icon in the Address area, this will bring up Google Maps to provide directions.
- ☉ Clock In – click the yellow arrow in the upper right corner, it looks like a play button.
- ☉ If applicable – complete any survey which may appear, example: COVID-19 Screening.
  - Answer all questions, if applicable - click “Tap to Sign”
  - Electronically sign the document (if applicable), click the check mark.
  - Click “Submit” in the upper right-hand corner.
- ☉ Medications – if applicable, click the Medications field on the general info screen.
  - Click the medication to administer, record the time given, and outcome.
  - Click “Submit” to save the medication administration record.
- ☉ Tasks – click on “Tasks” at the bottom of the screen to access the care plan.
  - Select the “Grouped” or “Timeline” view to display the care plan tasks.
  - Each task **must** have a designation of Completed, Declined, or N/A.
  - Notes - Click the blue clipboard/cross icon to leave notes on any of the specific tasks.
  - Narrative – write the shift narrative in the text area.
  - Shared Notes – write any notes regarding the shift/client needing to carry forward to the next shift. These notes will remain until manually removed/deleted by a user.
- ☉ Vitals – click the Vitals tab, record vitals taken during the shift (not a mandatory field).
- ☉ Mileage – click the Mileage tab, enter any mileage driven **during** the shift.
- ☉ Intake – click the Intake tab, click the toggle switch to record any food intake.
- ☉ Clock Out – click the yellow box at the upper right corner, it looks like a stop button.
  - Review the shift details, click “Sign and Submit” – get the e-signatures.
- ☉ Incident Reporting – “Was there any incident during your shift?” Answer Yes or No.
  - If No the shift is over, if Yes select who it involved “Me” or the “Client”
  - Type the description, click “Submit” when done.

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## Offline Mode – Connect With Limited/No Connectivity

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- ☉ When in an area of strong connectivity (home, office), open the SwyftCG App.
- ☉ Login to the SwyftCG app.
- ☉ Leave the SwyftCG app open on the device.
- ☉ Go to the shift, do not close out or log out of the SwyftCG app.
- ☉ Offline Mode will automatically begin if there is low connectivity, if the app has not been closed out or logged out since being connected earlier.
- ☉ Proceed to use the SwyftCG app as usual to clock in, complete the shift, and clock out.
- ☉ Leave the SwyftCG app open and logged in (not clocked in) when leaving the shift.
- ☉ When an area of strong connectivity is reached, the SwyftCG app will automatically transmit the shift data to the SwyftOps admin portal.

NOTE – When in offline mode, GPS features will not work (if enabled in EVV Settings).

Due to this the office will receive a “Late Shift” alert stating the caregiver did not clock in. Please follow your standard Late Shift Alert office protocols to verify if the caregiver is at the location.

In Offline Mode, app users will also not be able to use the two-way messaging, will not receive any notifications, or be able to update their profile

Again, this is because the app is in offline mode and cannot transmit data without connectivity as explained above.