AMANZE USER'S GUIDE

How to use the Amanze app

A plain-language, role-by-role walkthrough — no computer background needed. Explore it here, or download a printable copy for your break room or new-hire packet.

Updated October 2026 — now covers fast-track setup, family care plan sign-off, and the new account tools.

Before you start

1. Go to the app. Open a web browser and go to **app.texasktd.com**. You can save it as a shortcut on your phone or computer.

2. Sign in. Type the **Username** and **Password** your manager gave you, then click **Sign In**. The first time, you'll be asked to accept a short confidentiality agreement — check the box and click **Agree & Continue**.

3. Find your way around. A menu lists everything your account can use. Inside most screens: **+ New** adds an entry, **Edit** changes one, **Save** keeps your work, **Cancel** backs out.

> You'll only see what your account is allowed to use. If this guide mentions something you don't see, your account type doesn't include it — ask your Facility Manager if you think you should have it.

Account types at a glance

ACCOUNT TYPE	TYPICALLY USED BY	COVERED IN THIS GUIDE
Caregiver	Front-line care staff	Caregiver Functions
Manager	Supervisors, RNs, and Facility Managers all use the *same* account type — there's no	Supervisor & RN, and Facility Manager (two ways a Manager

ACCOUNT TYPE	TYPICALLY USED BY	COVERED IN THIS GUIDE
	separate "Supervisor" or "RN" login	account gets used)
Manager, with Admin turned on	Whoever handles account setup and state survey visits	Administrator
Owner	Facility owner — can view everything, and manage the Facility Assets list	Not a separate section — see the Manager sections
Surveyor	Visiting state inspector — temporary, view-only access	Granted using the Administrator section's instructions

CAREGIVER FUNCTIONS

Caregivers

Everyday tools for logging care, reporting incidents, booking appointments, and checking medications.

What's in your menu

Daily Logs add your shift notes	**Incident Reports** add	**Readings Log** enter temperatures
Appointments add	**Visitors & Family** add a visit request	**Residents** view only
Medications view only	**Caregivers** view your own profile only	**Staff Compliance** view your own status

How to log a Daily Care entry

1. Click **Daily Logs** in the menu.
2. Click **+ New**.
3. Pick which shift you're logging — the form shows the right questions for that shift.

4. Choose the resident and fill in what happened: meals, hydration, mood/behavior, safety checks, and anything else the form asks for.
5. Under **Caregiver or Manager**, pick who was responsible for the shift. A Manager or Owner who personally did the shift can be picked too.
6. If you gave, missed, or a resident refused a medication, record it in the Medications part of the same form.
7. Click **Save**.

How to report an Incident

1. Click **Incident Reports**, then **+ New**.
2. Choose the resident, date/time, incident type, location, and describe what happened.
3. In the red **Response & Notifications** box, write what staff did right away, who was called (911, nurse, doctor), who in the family or POA was told, and who saw it. The resident's POA / LAR and doctor appear at the top of the box, and the **Add to notification** and **Add to clinical contacts** buttons copy their details into the boxes below for you to complete.
4. Click **Save** — your Facility Manager and Owner are automatically emailed right away.

How to record a temperature reading

The **Readings Log** is for the refrigerator, freezers, the medication refrigerator and hot water. Each one shows its allowed range and when it was last checked.

1. Click **Readings Log**.
2. Find the card for what you are checking, type the temperature, and click **Save reading**. Each card has a **date** and a time: if you took the reading earlier, or on a previous shift, change the date to the day you actually took it. The log keeps the date taken and the day it was typed in, so a late entry is shown as such.
3. If the number is outside the allowed range, the card turns red and asks what you did about it (for example, moved food to the backup refrigerator and called for repair). You must write

that before you can save.

4. A reading outside its range shows in red on the manager's dashboard. A check that is overdue shows in yellow.

Managers and owners: click **Manage points** to add or rename a refrigerator, freezer or hot-water check, change its allowed range, or **Set up from my equipment**. That screen looks at the equipment already on your Facility Assets list and suggests a reading point for each refrigerator, freezer, medication refrigerator, water heater and HVAC unit. Tick what applies, choose the device each one measures (or add it as a new device), check the allowed range, and click **Create the ticked points**. **Print monthly log** gives a printable sheet for the binder.

How to book a resident's Appointment

Use this for a doctor visit, therapy session, lab work, or any outside appointment.

1. Click **Appointments**, then **+ New**.
2. Choose the resident, appointment type, date and time, provider/clinic, and whether transportation is needed.
3. Click **Save**.

> You can add an appointment, but can't edit or delete one afterward — ask your Supervisor or Facility Manager if something needs to change.

How to log a family or POA visit request

Use this when a resident's family member or Power of Attorney calls the facility asking to schedule a visit.

1. Click **Visitors & Family**, then **+ New**.
2. Choose the resident, and fill in the visitor's name, relation, phone, and email.
3. Enter the date and time they'd like to visit.
4. Click **Save**.

Your request is automatically saved as **Pending**. You can't approve it yourself — your Facility Manager reviews it and marks it Approved or Denied. If it's denied or needs a different time, they'll call the visitor back directly.

Viewing Medications, your profile, and Staff Compliance

Click **Medications** to see every resident's current medications — view only. Click **Caregivers** to see your own record (never anyone else's). Click **Staff Compliance** to see your own training/background check/health-requirement status, including anything expired or coming due soon.

SUPERVISOR & RN

Supervisors & RNs

You sign in with a **Manager** account, the same account type covered under Facility Manager — this section highlights the clinical and supervisory tasks you'll use most.

Because your account is a full Manager account, you'll see the entire menu, including facility items like Maintenance and Training Records — those are covered under Facility Manager. This section focuses on correcting caregiver entries and managing medications and care plans.

Correcting a caregiver's entry

1. Open the menu item (for example, **Daily Logs**) and find the entry.
2. Click **Edit**, correct it, then click **Save Changes**.

Adding or updating a resident's medication

1. Click **Residents** and open the resident's record.
2. Scroll to the **Medications** section on their profile.

3. Click **+ Add Medication** (or **Edit** on an existing one).
4. Fill in name, dose, route, when to take, doctor's instructions, prescriber, status, and dates.
5. Click **Save**.

Updating medications from a document

If a doctor's visit produced a scanned document, the app can read it and suggest updates — you always review and approve before anything is saved.

1. Open the resident's record, scroll to Medications, and click **Update from Document**.
2. Paste the document's link, or type its file name if it's already in the facility's shared document folder.
3. Click **Extract Medications** and wait — this can take up to a minute.
4. Medications already on file are shown but left **unchecked** automatically; only genuinely new ones are checked by default. Review, correct anything wrong, then click **Add Selected Medications**.

Updating a resident's Care Plan

Edit **Care Plan Notes** directly on the resident's record, or use a document: click **Update Resident's Care Plan**, paste a link or file name, click **Read Document**, review the proposed update and "what changed" summary, then click **Save to Resident's Care Plan**.

Getting a family member's sign-off on a care plan update

When a doctor, a hospital discharge, or a return from rehab changes a resident's care plan, the state expects proof that the resident's POA, guardian, or family member saw it. The app can email them a private link to review the plan and confirm — no login needed. Only a Manager sends these; the app never sends one automatically, so a small correction doesn't email the family.

1. Open the resident's record and make sure the **POA / Emergency Contact** name and **email** are filled in.
2. Update the **Care Plan Notes** and save.

3. Scroll to **Care Plan Acknowledgment (POA / Emergency Contact)** and click **Request POA Acknowledgment**, then confirm.
4. The family member gets an email with a secure link only — the care plan itself is never in the email. They open the link, read the plan, type their name, and confirm. They can also click **Print or Save a Copy** to keep one.
5. The table on the resident's record shows **Pending** until they confirm, then **Acknowledged** with their name and the date and time. Show this to a surveyor who asks for it.

> The link works for 30 days. If it wasn't opened, click **Resend** on that row. Use **Delete** only for a test or a mistake — deleting a confirmed record asks you to be sure, because a surveyor may want to see it. This is a typed-name confirmation with a date, time, and address on file; it is not a certificate-based e-signature.

Vital information on a resident's profile

So a surveyor or EMS responder doesn't have to hunt through documents, a resident's profile holds the essentials up front: Social Security number, Medicaid ID, Medicare number, other insurance, the POA / emergency contact (name, phone, email), and **DNR / Code Status** (Full Code, Yes — Do NOT perform CPR, or No — Perform CPR). Confirm code status with the resident's physician or POA before setting it.

Finding a resident's medications

On the **Medications** page, type a **resident's name** in the search box to see only that resident's medications, or type a **medication name** to see everyone taking it.

Dashboards you can view

Main Dashboard for a facility-wide snapshot; **Staff Compliance** for every caregiver's status, not just your own.

FACILITY MANAGER

Facility Manager

The same **Manager** account as Supervisor & RN, with a focus on running the facility: residents, staff, maintenance, training, and compliance.

Your full menu

MENU ITEM	WHAT IT'S FOR
Main Dashboard	Facility-wide snapshot: residents, alerts, daily operations, appointments, maintenance, compliance
Staff Compliance	Every caregiver's training/compliance status, SEMARC result, and annual training hours
Facility Profile & Assets	License information (applications and renewals are submitted through the State's TULIP portal), the getting-started checklist, the import tools, the standard assets list, and the equipment list — see New Facility Setup
Residents	Full resident records — profile, risk flags, care plan, medications. Grouped Active (green), Discharged (brown) and Deceased (gold), with the date beside the status
Caregivers	Staff roster — SEMARC eligibility result, training, health requirements. On a caregiver's record, the SEMARC check and training dates sit in their own box, and each training date is colored: **green** for done in the last 12 months, **gold** for not done, **orange** for over a year ago
Medications	Add, edit, and review every resident's medications, grouped by resident with a count, folded until you click a name — search by medication or resident name
Training Records	Add/update each caregiver's training and certifications — or read them from certificate photos. Search by a person's name to see only their training, or by a training name to see everyone who has taken it. Rows are colored green (current), gold (not done), or orange (over a year ago or expired)
Maintenance & Tasks	Facility maintenance tasks and inspections
Visitors & Family	Contacts, POAs, and visit requests — approve or deny requests caregivers log
Compliance Documents	Track compliance tasks/documents and due dates — a standard checklist can be loaded from Facility Profile & Assets, and each item linked to the equipment, tasks, and plans it concerns

MENU ITEM	WHAT IT'S FOR
Users & Access	Only visible with Admin rights — see Administrator

Before you hire: check eligibility with SEMARC

State regulation requires it: before you hire a caregiver or an RN, a Manager must search the person in **SEMARC** — the Search Engine for Multi-Agency Reportable Conduct, developed under Chapter 810 of the Texas Health and Safety Code. SEMARC searches across participating state agencies for anyone found responsible for reportable conduct against a vulnerable person, and the result is used to decide eligibility for employment, volunteer positions, certification, contracts, or licensure with facilities those agencies regulate or license. Only authorized users can search: your **facility administrator** gets SEMARC access through **TULIP** — the Texas Unified Licensure Information Portal, the Health and Human Services Commission's online system for long-term care licensing (applications, renewals, changes of ownership, electronic payments, and licensure status) — and then grants access rights to the facility manager and anyone else responsible for HR. (That is separate from the Admin rights in this app.) SEMARC is about eligibility only — training is tracked separately — and it replaces the separate EMR and DPS background checks that were recorded here before.

1. Go to the State's search site, search.semarc.texas.gov, and search for the person.
2. Note the outcome, and save or screenshot the result page. The search can come back clear, flagged, or with parts still pending.
3. In the app, click **Caregivers**, then **+ New** (or **Edit** for someone already on the roster).
4. Fill in **SEMARC Check Date** (the day you ran the search), **SEMARC Result** — *Cleared*, *Flagged*, or *Pending* (use Pending when one or more parts of the search haven't come back yet) — and **SEMARC Search Result / Link** (a link to the saved result or screenshot).
5. Click **Save**. When a Pending result comes back, click **Edit** and update it.

> The search is mandatory and must be done **before** a hiring decision — don't treat a Pending or Flagged result as a clearance. On the **Staff Compliance** dashboard, a caregiver counts as compliant only when their SEMARC result is *Cleared* and their core trainings are on file. Anyone with a Flagged, Pending, or missing result is listed under **Missing/Non-Clear SEMARC** so you can follow up.

When a resident or employee leaves

Nobody is erased when they leave. Change their **Status** and the app moves them out of the way while keeping their history.

- **Residents:** set **Status** to *Active*, *Discharged* or *Deceased*. A **Discharge Date** or **Date Deceased** box appears beside it, starting as today (change it to the real date). On the Residents list they sit in a **green** Active group, a **brown** Discharged group, and a **gold** Deceased group at the bottom.
- **Employees:** on the Caregivers page set **Employment Status** to *Active*, *Resigned* or *Terminated*, with its date. The list groups them the same way, and the Resigned and Terminated groups start folded because turnover is common.
- **Their login switches off automatically** the moment an employee is marked Resigned or Terminated. Setting them back to Active does not turn it back on; a manager re-enables it under **Users & Access**.
- **What changes:** people who have left no longer appear in pickers for new entries, on caregiver screens, in dashboard counts, or in the list for logging a training class. Caregivers only ever see active residents.
- **What stays:** their past daily logs, medications, appointments, incident reports and training records stay on file, in folded groups below. Incident reports still count on the dashboard on purpose.

Deleting a resident added by mistake

Click **Delete** on the resident as usual. The app first lists exactly what would be removed with them (for example "12 daily logs, 1 medication"). To go ahead you type the word **DELETE** into the box. Everything goes to the **Recycle Bin**, where a manager can restore it for 30 days (see below), so a mistaken delete is not final. For a resident who really lived at the home, set Status to Discharged or Deceased instead. If nothing is attached to the resident, a simple confirmation is all it asks for.

Lists organized around the person

Daily Logs, Medications, Appointments, Incident Reports and Training Records are grouped by resident (or by employee for Training Records), A to Z, with a count beside each name. Each person's records stay **folded**: click a name to open it, click again to fold it. Type a name in the **search box** at the top and only that person's records show, already open. Discharged and deceased residents (and resigned or terminated employees) sit in their own folded groups below.

The form for adding or editing a medication opens in its own teal **Edit Medication** box, matching the Medications section on a resident's record.

Survey packet and resident chart

When a surveyor arrives, you can hand over everything on one page.

- **Survey packet:** on **Facility Profile & Assets**, click **Survey packet**. It opens a printable page with the license profile, what needs attention right now, the current resident list (census), emergency drills, every compliance document and recurring task with due dates, equipment and service dates, each staff member's training and hours, and the last 12 months of incidents. Overdue and missing items are marked in red.
- **Printable forms library:** on **Facility Profile & Assets**, open **Printable forms library** to download the Excel form sheets (visitor sign-in, temperature logs, drill roster and more), the full Forms & Compliance Binder (PDF and editable Word), and the State's Fire Drill Report (Form 4719).
- **Resident chart:** open a resident and click **Resident chart**. It opens one resident's profile, risks and care needs, care plan, family acknowledgments, medications, incidents, appointments, and a count of daily logs.
- On the page, click **Print / Save as PDF**, then choose *Save as PDF* in your browser's print window to get a file. Managers, owners and surveyors can open both.

> The packet contains protected health information. It never includes Social Security numbers, and it shows live data as of the moment you open it. Keep printed copies secure.

A warning when someone may already be on file

When you add a new resident or employee, the app checks for the same person already on file, including someone who has left. It catches the same name in a different order or with a Jr or Sr, a name a letter or two off (for example Sechler and Sechlerx), the same last name with the same first initial, the same date of birth with a shared name part, and, for employees, the same email or phone number. If it finds a match you see who it is, their status and room, and you choose to **go back** or **add anyway**. If someone who left is coming back, open their old record and change the status instead of starting a second one.

Activity Log and Recycle Bin

- **Activity Log** (managers and owners) lists who added, changed, deleted or restored records, newest first, with what changed (for example "status: Active to Discharged"). Filter by kind of record or search by person or name. Changes to Social Security numbers are shown as "changed" without the value. It also records login creation, password resets and permission changes.
- **Recycle Bin** (managers) holds deleted records for **30 days**, along with anything deleted with them, such as a resident's daily logs and medications. Click **Restore** to put it all back exactly as it was. After 30 days an item is removed for good.
- Deleting a **login** under Users & Access is still permanent. Use Deactivate when you might want it back.

Your weekly reminder email

Every Monday morning (Central time) each manager with an email on file gets one email that **names every item needing attention**: overdue maintenance, overdue compliance items, and staff training that is missing, expired, or short on hours, plus missing HB 300, manager courses and SEMARC checks. Each section says how to fix it. The same email comes again the next Monday **until each item is updated**, and no email is sent in a week when nothing is outstanding.

> New facilities don't get this email for their first two weeks, since the setup emails cover that period. Every email has a link to turn the weekly reminder off.

Dashboards: dates, overdue items, and sample records

- **Every overdue item stays listed** on the dashboard, however old, with how many days overdue. Nothing drops off after 30 days.
- **Dates follow your facility's Central time**, so "today" and "overdue" stay correct in the evening.
- **Sample records never appear at a real facility,** on the dashboard or in any list. Only the demo facility shows them.
- **Equipment groups** (Fire & Life Safety, Medical, HVAC, Security) are matched by the asset's category, type or name, so an "ADT Security System" counts as Security.

Adding a Maintenance task

1. Click **Maintenance & Tasks**, then **+ New** — a Task ID fills in automatically.

2. Pick the Facility Asset, describe the task, and set a **Next Due** date and/or a **Scheduled Date**.
3. For **Assigned To**, pick a caregiver, or choose Supervisor, Manager, Contractor, or Vendor.
4. Click **Save**.

> You'll get an email reminder when a task's Next Due date arrives (weekly until Completed), plus a heads-up email 1–2 days before a Scheduled Date.

Approving a family/POA visit request

When a caregiver logs a visit request from a phone call, it shows up here as **Pending**.

1. Click **Visitors & Family** and find the request.
2. Click **Edit**.
3. To approve it, set **Visit Status** to **Approved** and click **Save Changes**.
4. To deny it, or if the date/time doesn't work, set **Visit Status** to **Denied**, add the reason in **Visit Notes**, then call the visitor back directly to explain or offer to reschedule. If they agree to a new time, update the **Visit Requested Date/Time** fields and set the status back to Approved.

NEW FACILITY SETUP

Fast-track setup

Skip the typing. Give the app the papers you already have, and it reads them into records for you to review. All of this lives on **Facility Profile & Assets** and is for **Manager** accounts.

> Claude reads the files, but a person always decides. Every screen shows what it found in a table first. Check names, dates, doses, and serial numbers against the paper, fix anything wrong, untick what you don't want, and only then click **Add**. Nothing is saved before that.

The Getting started checklist

At the top of the page, a checklist shows how far along the facility is: profile, Drive folder, residents, medications, caregivers, caregiver logins, assets, maintenance reminders, the compliance checklist, training records, and annual training hours. Steps count **everyone**, not just the first person — for example, "Medications — 3 of 9 residents", with the names of the residents still waiting underneath.

Import residents, caregivers, or training records from a file

1. Under **Import from a file**, choose what you're importing: **Residents**, **Medications**, **Caregivers**, or **Training records**.
2. Click **Choose File** and pick a roster, face sheets, or training paperwork — a **PDF**, a **photo** (JPEG or PNG), or a **CSV** spreadsheet export. You can pick several files at once. For a large PDF, put it in your Google Drive and paste its share link instead.
3. Click **Read file** and wait up to a minute.
4. Review the table. People already on file are marked *Already on file* and left unchecked. Edit any cell, untick any row, then click **Add selected**.
5. A pop-up summarizes what was read, what was added, and what was skipped because it was already on file.

Limits: up to 100 people at a time, PDFs and photos up to about 3 MB (photos are shrunk automatically), CSV files up to 1 MB.

Add medications from a doctor's note or discharge papers

1. Choose **Medications**, then pick the **resident**. Residents still waiting show "— needs medications".
2. Upload a photo or PDF of that resident's medication list and click **Read file**.
3. Check every **name, dose, and route** against the paper. Anything the app wasn't sure of says *Check against the paper* and starts unchecked.

4. Click **Add selected**. A drug already on file with the same dose is skipped. If the paper shows a *different* dose than the record, the app shows the difference but does **not** change anything — update it on the Medications page. If the paper says to *stop* a medication, it tells you and changes nothing.

For a resident who takes no medications, click **This resident takes no medications**. When the remaining residents have none, click **Done with medications** on the checklist.

Create logins for your caregivers

After you add caregivers, an **Administrator** can click **Create logins**. Each person gets a username built from their name — first initial plus last name, such as **JDoe** (or **JoDoe**, then **JDoe2**, if that's taken) — and a temporary password. Those with an email address are emailed; for everyone else, click **Print login slips** and hand them out. The passwords are shown only once, so print or copy them before leaving the page.
Importing a staff list adds people to the roster but does **not** record their SEMARC result — run the SEMARC search for each person and record it on their caregiver record (see Before you hire: check eligibility with SEMARC).

Load the standard assets list

Most small homes don't start with an equipment list, so the app provides one: 17 assets an assisted living home usually has.

1. Each asset on the standard list has a reference number (FA1 to FA17). Under **Quick-start: standard assets & maintenance schedule**, click **Load standard list**.
2. Tick what your home has: fire alarm, sprinklers, extinguishers, emergency lights, smoke and carbon monoxide detectors, kitchen hood, generator, HVAC and AC filters, water heater, van, pest control, first aid kits, internet and communications equipment, and emergency food and water.
3. For each, type **where it is**, check **how often** it's serviced (the suggestions can be changed), and check the **last serviced** date. It starts as today so you can load the list in one pass — change it to the real date for anything serviced earlier, because the next reminder is counted from it.

4. Click **Add selected**. Each asset gets an ID automatically (FA-0001, FA-0002…), and a maintenance reminder (MT-0001…) is scheduled from the last-serviced date.

> **Emergency food and water.** The state expects a 4-day supply of non-perishable food — three balanced meals a day per resident, 12 meals each — and an adequate supply of drinking water; 1 gallon per person per day (4 gallons per resident) is the recommended minimum. The screen shows what your current resident count needs. Their "last serviced" date starts as the 1st of the month your facility was set up and the check is repeated every 6 months — change the date to the real one if your stock is older. An asset added *without* a last-serviced date has no reminder until you enter one.

Load the standard compliance checklist

New facilities start with no compliance items, so the app offers a standard checklist of the recurring tasks and documents a Texas assisted living home keeps up with.

1. Under **Quick-start: standard compliance checklist**, click **Load standard checklist**.
2. Items are grouped: **Life Safety** (fire alarm, sprinklers, smoke and carbon monoxide detectors, emergency lighting), **Emergency Preparedness** (drills, one annual emergency plan review, 2-1-1 Texas registration, generator tests), **Resident Care** (care plan and service plan reviews, medication and MAR audit, fall and elopement risk assessments, dietary review), **Infection Control**, **Facility Compliance** (water temperature logs, pest control, safety walkthrough, vendor contracts, insurance), **Licensing** (license renewal through TULIP), plus the **facility documents, the emergency risk assessment and plan, and one policy per topic** a surveyor expects to see. The list is about 49 items; related checks are combined, so one monthly walkthrough or one annual plan review covers what used to be several separate rows.
3. Tick what applies. Use **Tick / untick all** on a group to change it at once. Check **how often** each is done, and check the **last done or reviewed** date. It starts as today so you can finish setup quickly — change it to the real date for anything done earlier.
4. Click **Add selected**. Recurring tasks get their next due date from the last-done date, and they show on your dashboard as due soon or overdue. Documents are added as *Missing* until you attach the file.

The frequencies are suggested starting points, not a statement of what the state requires — change any of them. For example, the fire drill starts at **quarterly, every shift**, which is the HHSC minimum; many homes run them monthly. Staff training, SEMARC checks, and TB screening aren't in this list because they're tracked on Training Records and the Caregivers page. An item added without a last-done date has no reminder until you enter one.

What follows the state's standards, and what is a suggestion. Built to the state's rules: the 4-day emergency food and water supply (26 TAC §553.261); the minimum fire drill frequency (quarterly, every shift); direct care staff annual training hours, the manager's 24-hour initial course and 12 continuing education hours a year, the extra dementia hours for Alzheimer's-certified facilities, and the 4-hour dementia course for managers at facilities that serve residents with dementia; HB 300 privacy training within 90 days of hire; and the SEMARC check before hiring. Suggested starting points that you set to match how your home runs: how often equipment is serviced and how often plans and policies are reviewed. Confirm anything you're unsure of with your HHSC licensing contact.

Link compliance items to your records

Each compliance item can point to the equipment, maintenance tasks, and emergency plans it concerns, so a surveyor can go straight from "Fire Alarm System Inspection" to the fire alarm panel and its service history. The app suggests the links by matching names, and you approve them — nothing changes until you click Apply.

1. Load your assets and your compliance checklist first (and add your emergency plans), then open **Facility Profile & Assets** and find **Link compliance items to your records**.
2. Click **Find suggested links**. Each row says what would change: **Add link** (ticked), **Remove (sample record)** (ticked — the link points at a sample/demo record), or **Review — remove?** (unticked — the plan's name doesn't look related, so keep it only if that plan really covers the item).
3. Untick anything you don't want, tick any review items you do want removed, then click **Apply** and confirm. A pop-up shows how many links were added and removed.

The links then appear on each item's page under Compliance Documents. Training records are not linked this way, because training is tracked per person on Training Records. This screen is available

to managers; an Owner login is view-only. Click **Find suggested links** again any time after adding more equipment or plans.

> **Colors show you where you are.** Each part of **Facility Profile & Assets** sits in its own colored block — checklist (orange), profile (blue), import (purple), standard assets (green), compliance checklist (gold), links (rose), equipment by photo (teal), training session (indigo), and the assets list (grey) — so you can tell where one step ends and the next begins. The same idea runs through the rest of the app: on a caregiver's record, the SEMARC and training box has its own tint, with each training date **green** (within the last 12 months), **gold** (not done), or **orange** (over a year ago); Training Records rows use the same colors; and due dates on the dashboard are colored current, due soon, or overdue.

Add equipment by photo

Under **Add equipment by photo**, take a photo of an equipment label (water heater, AC unit, generator), a fire extinguisher or alarm inspection tag, or a service report, and click **Read photo(s)**. The app suggests a name, category, make, model, serial number, and service date. Check the model and serial number against the label, add where it is and how often it's serviced, then click **Add selected**.

Training certificates: read them, or let caregivers upload their own

1. Choose **Training records** and upload photos or PDFs of certificates or wallet cards (CPR, first aid, and so on), or a CSV training log, then click **Read file**.
2. The app matches each one to a caregiver — change it if it's wrong. It also recognizes manager courses (the 8-hour regulations class, the 16-hour administrative overview, the 4-hour dementia course, and continuing education by topic) and records who provided the training. If a certificate prints an expiration date, that's used; if not, the app estimates one from the usual validity and marks it *estimated*, so check it.
3. Click **Add selected**. This saves the training record, keeps the certificate on it, and updates the caregiver's core-training date used in the Staff Compliance score.

To save yourself the photographing, pick a caregiver under **Or ask a caregiver to upload their own certificates** and click **Send upload link**. They get a private link by email (or you can copy it

and text it) and upload their photos from their phone — no login. When they're done, click **Review** next to their name to check and add them.

Log a training session and track the annual hours

Texas sets different training requirements for direct care staff and for managers. The app tracks them like this (26 TAC §553.253, §553.254 and §553.301, and HHSC provider letter PL 2024-21 — confirm against the current rules):

- **All staff:** a **4-hour orientation before any job duties**.
- **Direct care staff:** after orientation, **16 hours of supervised on-the-job training**, then **6 hours of training each year**, which must include **1 hour of fall prevention and 1 hour of behavior management**. If your facility is Alzheimer's-certified, there are **extra dementia hours** as well (confirm the exact total with HHSC).
- **Direct care staff at a facility that serves residents with dementia but isn't Alzheimer's-certified:** a **4-hour dementia course with a passed competency evaluation before they give personal care**, then **2 hours a year** of dementia best practices. Those 2 hours count toward the 6 annual hours. HHSC applies this whether or not the facility advertises as memory care.
- **Managers, the first year:** an initial **24-hour course** — an **8-hour Texas regulations class within 3 months** of hire and a **16-hour administrative overview within the first year**. These 24 hours also count as the 12-hour requirement for that first year. They must come from a recognized organization — an academic institution, an assisted living corporation, or a recognized state or national association — not a facility in-service, and the record should show the content, hours, dates, and provider — keep the certificate attached to the training record.
- **Managers, every year after: 12 hours** of continuing education, or **18 hours including 6 dementia hours** if the facility is Alzheimer's-certified. The hours must cover **at least two** of these topic areas: resident care, dementia, ethics, leadership, regulatory compliance, emergency preparedness, medication management, and aging/geriatrics. The training list has a **Manager continuing education** group with each one, so you can log the hours by topic.
- **Managers at a facility that serves residents with dementia but isn't Alzheimer's-certified:** a **4-hour dementia course** and a passed competency evaluation, then **2 hours a year** of dementia best practices (counted inside the 12 hours). Turn on **Serves Residents With Alzheimer's or a Related Disorder** on **Facility Profile & Assets**, and the app flags any manager who hasn't logged it. Attach the passed competency evaluation to that training record by pasting a link to it in the record's **Certificate** field.

- **Managers, every year:** HHSC's free **1-hour online training on aging in place and retaliation**.
- **All staff: HB 300 privacy training within 90 days of hire**, with a signed statement kept for 6 years. The law sets no fixed renewal date, so a yearly refresher is good practice and is not flagged. Staff with only incidental contact with residents, such as housekeeping or front desk, need a short 3-topic dementia course with an evaluation; it's in the list as *Dementia Basics for Non-Direct Staff* but isn't flagged.

The app counts each person's logged hours over the **last 12 months** (orientation, the 16-hour on-the-job course and the HHSC online course aren't counted, and the manager initial-course classes count only during a manager's first year) and shows where they stand. A person counts as a manager if their role is Manager or Administrator. If it applies to you, turn on **Alzheimer's-Certified Facility** on **Facility Profile & Assets**.

1. Under **Log a training session**, choose the training from the list (or choose *Other* and type the course name). Each one has a reference number (T1, T2 and so on), so you can point to it easily when you call or write for help. The list follows HHSC's training topics for direct care staff (Texas Administrative Code Chapter 553). **Initial training, before working alone:** orientation, resident rights, assistance with daily living, basic first aid, and medication assistance (if it applies to the role). **Facility policy, refreshed every year (good practice, not a yearly state requirement):** abuse/neglect/exploitation reporting, infection control, fire safety, emergency procedures and preparedness, and dementia training (if you serve residents with cognitive impairment). It also has commonly given extras (CPR, fall prevention, behavior management, resident health conditions, safety measures, confidentiality/HIPAA), HB 300 privacy training, and the two manager initial-course classes (8 and 16 hours).
2. Enter the **date completed** and the **hours**. Leave **Expires** blank to use the usual validity (12 months for the yearly facility-policy topics; 24 months for CPR and first aid, which is the usual card validity — check the expiry on the actual card; HB 300 privacy training does not expire).
3. For the **required courses** (the on-the-job course, the dementia courses, HHSC's online training and HB 300 privacy training), a box appears asking you to **confirm the training was completed and the certificate or sign-off is on file**, whether it was in-house or from an outside provider. Paste a link to that proof in the Certificate field. For the dementia courses it should show the competency evaluation was passed, and if one training covered several topics, keep a note of which topics it covered (PL 2024-21).
4. Optionally, enter the **provider** (for example UT Austin or TALA) and paste a **link to the**

certificate or sign-in sheet. It's attached to every record in the session.

5. Tick **everyone who attended** — or click **Select all** — and click **Save training**. One Training Record (TR-0001…) is created for each person, and a core training also updates their core-training date for the compliance score.

> Hours only count once they're entered. Training records you saved before this feature have no hours, so people can show "0 of 6" until you add them. You can edit an old record's **Training Hours** on the **Training Records** page, and certificates read from a photo fill in the hours when the certificate prints them. The **Staff Compliance** dashboard shows a **Training Hours (12 mo)** column and alerts for **Short on Annual Training Hours**, **Manager Initial Course Overdue** (for managers hired in the last two years), **Missing 16-Hour On-the-Job Training**, **Missing Direct Care Dementia Course**, **Missing Annual Fall Prevention / Behavior Management Hour**, **Missing HHSC Online Training**, and **Missing HB 300 Privacy Training** (due within 90 days of hire). These hours are tracked separately from the compliance score and don't change it.

IDs are automatic

You never type an ID: Employee IDs (EMP-0001), Asset IDs (FA-0001), Task IDs (MT-0001), and Training Record IDs (TR-0001) are numbered by the app for your facility.

ADMINISTRATOR

Administrator

"Administrator" isn't a separate account type — it's a **Manager** account with an extra **Admin** permission turned on, unlocking **Users & Access**.

> Any Manager can be given Admin rights — often the Facility Manager or Owner holds this, and can delegate it to another trusted Manager.

What Admin unlocks

- Create, deactivate, delete, or edit staff accounts (Caregiver, Manager, or Owner)
- Create logins for a whole list of caregivers at once after importing them (see New Facility Setup)

- Reset anyone's password
- Turn Admin rights on or off for another Manager's account
- Grant and revoke temporary access for a visiting State Surveyor

Granting access to a visiting State Surveyor

1. Click **Users & Access**, then find **State Surveyor Access**.
2. Click **Generate Surveyor Access** — a username and one-time password appear; give these to the inspector.
3. Access works for 24 hours by default and is view-only.
4. When the visit ends, click **Revoke Now** to end access immediately.

Creating a staff account, resetting a password

1. Click **Users & Access**, then **+ New User**. You don't type a password — the app generates a temporary one, shows it once, and emails it if you entered an email address.
2. The person signs in with it and is asked to choose their own password right away.
3. To help someone who's locked out, find them and click **Reset Password** — it generates a new temporary password the same way.

> New **Manager** and **Owner** accounts are automatically added to the staff roster, so they can be picked as the responsible person on a Daily Log.

Sign-in protection and reviewing access

- **Lock-out:** five wrong passwords in a row lock that account for 15 minutes. The person can try again after that, or you can reset their password.
- **Last sign-in:** the list shows each login's last sign-in date, so unused logins stand out. "never" means it has not been used yet.
- **Unlinked logins:** a caregiver login that isn't tied to an employee record is flagged in red, because it won't switch off by itself when that person leaves. Link it or deactivate it by hand.

- **Grouped list:** active users are in a green group; deactivated users sit below in brown; the surveyor and app-tester accounts that are switched off sit in a grey group.

Deactivate or Delete

Deactivate is for a **temporary** suspension — the person can't sign in, but their account and history stay, and you can turn it back on. **Delete** removes an account **permanently** when someone should be gone for good, and it asks you to confirm. You can't delete your own account.

Q&A

Common questions

I don't see a menu item this guide mentions.

That's expected — you only see what your account type includes. Ask your Facility Manager if you think you should have it.

I forgot my password.

Ask your Facility Manager or an Administrator to reset it from **Users & Access**.

I made a mistake on something I can't edit.

Tell your Supervisor or Facility Manager — a Manager account can correct almost any entry.

My Surveyor access says expired.

That's by design — ask your Facility Manager or Administrator to generate a new one.

Why was I asked to choose a new password the first time I signed in?

Your account started with a temporary password. Choosing your own keeps it private to you.

A family member says their care plan link doesn't work.

Links work for 30 days and can be used once to confirm. Open the resident's record, find the Care Plan Acknowledgment table, and click **Resend** — or send a new request if the contact's email has changed.

The file I imported read something wrong.

That's why every import shows a table first. Fix the cell or untick the row before clicking Add. Anything the app wasn't sure of is flagged. Nothing is saved until you click Add.

What does the Search Docs box at the top do?

Type what you're looking for (for example, "the March fire drill") and it searches your facility's shared Google Drive folder. Leave it empty and click Search to open the folder itself. Set the folder link on **Facility Profile & Assets**; until you do, the box tells you no folder is set up.

Why does someone show "0 of 6 hours" when they've had training?

Hours count only when they're entered on a training record. Use **Log a training session** on **Facility Profile & Assets** for a class, or edit the record's **Training Hours**. Only training completed in the last 12 months counts, and Orientation doesn't.

I can't get into SEMARC to check a new hire.

SEMARC access is granted by your facility administrator through TULIP, the State's licensing portal. Ask them to give you access rights, then run the search before you decide to hire.