

CARELIFE

CARE IN CONTEXT



What is CareLife?

CareLife is a Responsive Web App

Designed to help you care for the people God has entrusted you to shepherd when they need you most





What is CareLife?

Care Cases, Care Logs, Prayer Requests, Needs

- Care Cases the overview of the situation
- Care Logs the times we have reached out to this person to provide care
- Prayer Requests/Feedback Entries specific recorded prayer requests
- Needs Needs requested by this household via the Need Connect App

CareLife Dashboard

CareLife Dashboard

L [▲] Statistics	Q +	Search			Care Cases
	21	14	12	34	2
	× Closed	O Lapsed	⊙ Needs Review	♡ New	😻 Active
	6/15/2021 West Bay Campus MinistryPlatform	Administrator,		Holiday South Campus Extended Care	
	3/10/2021 Morris, Ashley		e)	Holiday (Chlo South Campus Physical Injury	2



CareLife Dashboard

 \equiv



Open Care Case



MinistryPlatform
Care Case Details
Jones - Physical Injury - 6/10/2021 Active
Bob has a beloved fish named Sammy. Sammy somehow broke her leg even though fish don't have legs. Bob is extremely upset. They are currently at the fish hospital. Please contact Bob to provide support.
Case Manager Melissa Reveles
Care Log Entries
Hospital Visit Due:

What is a Care Case?

Care Cases keep the overview of the specific care effort that is being provided to the Household in need. Here are some examples of when a Care Case may be opened:

- Physical injuries
- Cancer/Chronic disease
- Loss of Loved one
- Natural Disasters
- Home/rehab center bound
- New Mother
- Job Loss
- Addiction
- Any individual or household needing extra care

Care Case in CareLife

<CareLife Dashboard

Care Case Details

6/10/2021

Active

support.

Case Manager

Jones - Physical Injury -

Bob has a beloved fish named

leg even though fish don't have

are currently at the fish hospital.

Please contact Bob to provide

legs. Bob is extremely upset. They

Melissa Reveles







What is a Care Log?

When used with a Care Case it holds each Care attempt and the outcome of that attempt

Care Logs can be assigned to Care Providers or added by a Care Provider

Care Logs can be created and updated via the CareLife App as well as the Platform

Care Log in CareLife

Log Entries

Show Completed

Hospital Visit Due:

Prayer Requests

time.

L Needs

+



What is a Prayer Request?

Prayer & Feedback is a place to store prayer requests

Prayer Requests can be added via the Platform and the Connection Card tool

Prayer Requests are associated with a specific person

Prayer Requests can be associated with a Care Case and viewed in CareLife

Prayer Request in CareLife

Cases			S MinistryPlatforr
Care Case Details		× +	La Contact Info
Jones - Physical Injury - 6/10/2021 Bob has a beloved fish named Sammy. Samn have legs. Bob is extremely upset. They are ci provide support. Case Manager Melissa Reveles	vy somehow broke her leg even th urrently at the fish hospital. Please	Active ough fish don't contact Bob to	New Martinsville Plaza
Care Log Entries	□ Show Due: 1/1/0001	Completed +	Copogle Google Fish Hospital Bob Jones (Male)
Assigned to: Reveles, Melissa	Overdue		Jones Family Jones Taylor, Andrea Head of Household
Please Pray for my Fish My poor fish is in such distress. Please pray fi	or his leg!	6/15/2021	
2 Needs			-
Transportation for work, appointments, or e By:	rrands For:	Jones, Bob	

──
Hospital Visit Due: Assigned to: 1/1/0001 Reveles, MelissaOverdue
Prayer Requests
Please Pray for my Fish 6/15/2021 My poor fish is in such distress. Please pray for his leg!
2 Needs
Transportation for work, For: appointments, or errands Jones, By: Bob



What is a Need?

Needs are ways that you have determined to work to assist those in crisis.

Originally created for Covid Response, the NeedConnect App is being used for natural disasters or vulnerable communities to help facilitate those who can provide care with those who have needs

A Need can be created via the NeedConnect App or through the platform

Needs in CareLife

are Cases		⊗ MinistryPlatform
have legs. Bob is extremely upset. They are currently at provide support. Case Manager Melissa Reveles	the fish hospital. Please contact Bob to	Serenity Views Cemetery
🗟 Care Log Entries	Show Completed +	Concele Quarters Lounge Fish Hospital
Hospital Visit Assigned to: Reveles, Melissa	Due: 1/1/0001 🗾	→ Bob Jones (Male) Jones Family Jones-Taylor, Andrea Head of Household
Prayer Requests		
Please Pray for my Fish My poor fish is in such distress. Please pray for his leg!	6/15/2021	
2 Needs		
Transportation for work, appointments, or errands By:	For: Jones, Bob	

MinistryPlatform	
2 Needs	
Transportation for work, For: appointments, or errands Jones, By: Bob	
Contact Info	
New Martinsville Plaza	

What Can I SEE in CareLife?

- Overview of Cases by Status (Dashboard)
- Care given today, last 7 days, last 30 days (Dashboard)
- Information about the Contact and Household
- Care Case Details
- Care Log Details
- Location Care Receiver is at (Hospital, etc)
- Prayer related to this Care Case
- Needs related to this Care Case

Dashboard

CareLife Dashboard

are Cases			Search	Q +	Lª Statistics
2	34	12	14	21	2
😻 Active	♡ New	Needs Review	C Lapsed	≍ Closed	Care Today
	Holiday South Campus Extended Care	2	۷ Administrator,	6/15/2021 West Bay Campus MinistryPlatform	44 ⊨ Last 7 Davs
2	Holiday (Chlo South Campus Physical Injury	ie)		3/10/2021 Morris, Ashley	141
					Last 30 Days

Dashboard



Care Case

Care Case Details		× -	Contact Info
Jones - Physical Injury - 6/10/2021 Bob has a beloved fish named Sammy. Sammy so have legs. Bob is extremely upset. They are curren provide support. Case Manager Melissa Reveles	mehow broke her leg ttly at the fish hospita	<i>Acti</i> even though fish don't I. Please contact Bob to	e New Martinsville Plaz Save Serenity Views Cemetery Long John Silver's 1
Care Log Entries	(Show Completed	Captain's Quarters Lounge Map
Hospital Visit Assigned to: Reveles, Melissa	Due: 6/18/2021 Incomplete	I	 ✓ Bob Jones (Male) @: devtesting@ministryplatform. Churchwide Campus, Active Participant Type
Prayer Requests			Attendee Marital Status
Please Pray for my Fish My poor fish is in such distress. Please pray for his	s leg!	6/15/20	Married 1 Participant Engagement Lapsed Jones Family
🏖 Needs			Jones-Taylor, A Head of House
Transportation for work, appointments, or errand	ds	For: Jones, Bob	

What Can I DO in CareLife?

- Communicate with the Contact receiving Care
- Create Care Cases
- Close Care Cases
- Create Care Logs
- Edit Care Logs
- Complete Care Logs

Email/ Text

	Send Message ×	
≎ C	Туре	Contact Info
Jon Bob	Email ~	New Martinsville Plaza
have prov	Select Recipients	Save A Lot
Case	Select 👻	Serenity Views Cemetery
	Subject	Long John Silver's 🖓
🛃 Ca	Enter subject	Captain's Quarters Lounge Google Map data ©2021
	Message	Fish Hospital ↓ Bob Jones (Male)
He As	Enter message	@: devtesting@ministryplatform.com Churchwide Campus, Deceased
_		Participant Type Attendee
🗩 P		Marital Status Married
Plea		Participant Engagement Lapsed
Мур	Drop files here or click to select files	Jones Family
2 N		Jones-Taylor, Andrea Head of Household
Tra By:	Send	







New Care Log

🎨 C	are Case Details	× +	Contact Info
Add New Care Log	×	Active broke her leg even though fish don't he fish hospital. Please contact Bob to	New Martinsville Plaza 🗢
Care Type* Select a care type Action Date*	Contact Select a contact ~		Serenity Views Cemetery
mm/dd/yyyy		ue: 6/18/2021	Google Map data @2021 Fish Hospital Bob Jones (Male) @: devtesting@ministryplatform.com Churchwide Campus, Deceased Participant Type
	0/2000	6/15/2021	Attendee Marital Status Married Participant Engagement Lapsed Jones Family
	Close Save changes		Jones-Taylor, Andrea Head of Household
Tra By:	nsportation for work, appointments, or errands	For: Jones, Bob	



	😵 Care Case Details	× +	Contact Info
Edit Care Log	×	Active	New Martinsville Plaza
Care Type*	Contact	entry at the fish hospital. Please contact bob to	Save A Lot
Hospital Visit	∽ Select a contact ∽		Serenity Views Cemetery
Action Date*			Long John Silver's
06/18/2021	Completed	Show Completed +	Google Map data ©2021
Notes		Due: 6/18/2021	Bob Jones (Male)
These are notes		Incomplete	Churchwide Campus, Deceased
			Attendee Marital Status
		6/15/2021	Married Participant Engagement
	15/2000	his leg!	Lapsed
	Close Save changes		Jones-Taylor, Andrea Head of Household
	Transportation for work, appointments, or e By:	rrands For: Jones, Bob	

The Details for Platform Managers

- Understanding the Care Case record
- Understanding the Care Log record
- Understanding Feedback & Needs
- Security Roles
- Configuration
- To Do List

Care Case in the Platform

Care Case	#17
Title:	Broken Leg of Fish
Description:	Bob has a beloved fish named Sammy. Sammy somehow broke her leg even though fish don't have legs. Bob is extremely upset. They are currently at the fish hospital. Please contact Bob to provide support.
Household *:	Jones 🔗
Contact:	Jones, Bob devtesting@ministryplatform.com
Start Date *:	6/10/2021 10:00 AM PT
End Date:	
Care Case Type *:	Physical Injury 🔗
Location:	Fish Hospital 61313 Northview Drive Lexington 🔗
Case Manager:	Reveles, Melissa 🔗
Share With Group Leaders *:	False
Program:	Care Activities West Campus 🔗

Understanding the Care Case Record

The Care Case record:

- Title: A short sentence describing the issue (CareLife doesn't use this field)
- Description: Pertinent details that help the Care Provider understand the context. A great place to store what hospital/facility room the individual is in.
- Household: The Household of the Contact you are caring for
- Contact: The Individual who is needing Care OR the main contact
- Start/End date: When you began care/when Care was concluded
- Care Case Type: The type of care needed this is customizable at your organization

Understanding the Care Case Record (Cont)

- Location: The current location of the person/household in crises may be a local hospital/rehab facility.
- Case Manager: Who is responsible to ensure this Care Case is provided with Care
- Program***: The Program associated the program controls whether texting is enabled for this case via the CareLife App

***The Program field is new as a result of this release

Care Log in the Platform

Care Log	Prayer & Feed	lback No	eeds	
X Close	Edit 📋 Delet	e 🔒 Print		
Household *:		ones 🔗		
Care Type *:	F	lospital Visit	ତ	
Care Outcome	*: 1	. Pending Ass	ignment	ଡ଼
Date Provided	*: 6	/16/2021 10:	00 AM P	т
Provided By *:	R	eveles, Meliss	a 🕜	
Notes:				
Care Amount:				
Paid To:				
PRIVATE *:	F	alse		
Contact:				
Completed *:	F	alse		
Action Date:				

Understanding the Care Log Record

- Household: The Household who received Care
- Case Type: What type of Care was provided
- Provided by: The Contact who provided Care
- Notes: Various notes added by the person who is assigning or providing care
- Contact: The Individual receiving Care
- Completed: True/False indicating if Care is complete
- Action Date: The Date the Care is Assigned or completed
- Completed: Whether or not Care is complete

Note the following fields have been deprecated in this release:

- Date Provided
- Care Outcome

Feedback & Prayer in the Platform

Jones, Bob Prayer Request 6/15/2021 Feedback Entry #108			
Contact *:	Jones, Bob devtesting@ministryplatform.com 🔗		
Entry Title *:	Please Pray for my Fish		
Feedback Type *:	Prayer Request 🔗		
Program:			
Date Submitted *:	6/15/2021 10:00 AM PT		
Visibility Level *:	4 - Public 🔗		
Description:	My poor fish is in such distress. Please pray for his leg!		
Ongoing Need *:	False		
Assigned To:			
Care Outcome:			
Outcome Date:			
Approved *:	True		
Care Case:	ø		

Need in the Platform

🗙 Close 📝 Edit 🚺 Copy 👕 Delete 🔗 Attach File 🖨 Print 🏏 Tools 🗸 🕍 Reports 🗸 🕅 Notify					
Jones, Bob Need #50	Jones, Bob Need #50				
Requester Contact *:	Jones, Bob devtesting@ministryplatform.com 🔗				
Postal Code:					
Campaign *:	Sample Campaign 🔗				
Need Type:	Transportation for work, appointments, or errands				
Other Need:					
Target Date:	6/16/2021 10:00 AM PT				
Complete *:	False				
Provider:					
Date Assigned:					
Notes:					
Need Guid *:	cdfdb359-cb78-46e2-a3bf-83bc04f35ee9				
Care Case:	G				

Needs & Prayer Sub-Pages on Care

Ca	🗙 Close 📝 Edit 🔲 Copy 👕 Delete 🖨 Print 🖌 Tools 🗸 🔛 Reports 🗸 🖍 Notify					
Care Case #17						
	Title:	Broken Leg of Fish				
Description: Bob has a beloved fish named Sammy. Sammy somehow broke her leg even though fish of have legs. Bob is extremely upset. They are currently at the fish hospital. Please contact provide support.			fish don't tact Bob to			
	Household *:	Jones 🔗				
	Contact:	Jones, Bob devtesting@	Dministryplatform.co	m 🕜		
	Start Date *:	6/10/2021 10:00 AM PT				
End Date:						
	Care Case Type *:	Physical Injury 🔗				
	Location:	Fish Hospital 61313 No 🔗	orthview Drive Lexir	ngton		
	Care Log Prayer & Fe	edback Needs				
	New Delete Image: Grid with the second					
	Date Subm	itte Last Name	Nickname	Feedback Type	Visibility Level	Program Name
	6/15/2021 1	10:0 Jones	Bob	Prayer Request	4 - Public	

Getting Started – Configuration

Checklist:

- Assign Security Roles
- Update Programs with SMS Number
- Update Configuration Setting
- Ensure your Google API is set up correctly
- Turn off Care Log Process
- Bonus: Add Locations & Associate Needs/Prayer

CareLife Security Roles

Two New Security roles will be deployed to your system:

- CareLife Case Administrator give access to ALL Care Cases the users Global Filter Restrictions allow
- CareLife Case Manager gives access to any Care Case assigned via the Care Case Manager field

	Role Name	Description	Role Type
	CareLife Case Administrator	WARNING: DO	Application/API
	CareLife Case Manager	WARNING: DO	Application/API

Texting in CareLife

There is a new "SMS Number" Field on the Program page

Populate this field to enable texting via the CareLife App on any Care Case associated with this Program

S Cancel Save € Reset					
Care Activities West Campus					
Statement Title *:	Tithes & Offerings				
Statement Header *:	Tithe/Offering 💙				
Allow Online Giving *:	●Yes ◯No				
Online Sort Order:					
Pledge Campaign:	······································				
Account Number:	ChangeMe				
Default Target Event:	✓ …				
On Donation Batch	●Yes ◯No				
Available Online *:	⊖Yes ●No				
Omit From Engagement Giving *:	⊖Yes [●] No				
SMS Number:	(clear) ····				
	(clear)				
Events Groups	Melissa Test				
	Primary Im				
New 📑 Grid 🌱 🧲	R Small Groups				



Configuration Setting

Update the Value to the ID of the Program that should be used when Care Cases are created via CareLife

CLOUDAPP Configuratio	PS,DefaultCareProgramID n Setting #381		
Application Code *:	CLOUDAPPS		
Key Name *:	DefaultCareProgramID		
Value:	2		
Description:	Program_ID. This is used when Care Cases are created via CareLife.		
Warning:	Incorrectly editing configuration settings can result in application errors. Changes may not take effect immediately. Contact support@thinkministry.com if you would like assistance.		
Primary Key Page:	Programs 🔗		

Process & Google API

Ensure your cloud apps is updated in your Google API https://www.ministryplatform.com/kb/ministryplatform/system-administration/configuration-settings/google-maps-api-key

Turn off the Household Care Log Process:



Locations

Add the most used Hospitals and other Care facilities to your system

Needs Manac	Fish Hosp	pital 61313 Northview Drive Lexington
i Event Partic	Location Name *:	Fish Hospital
i Event Grou	Congregation:	Ashley Awesome Campus
👖 Room Reser	Description:	
틙 Equipment		
** Service Res		
🛗 Event Metri		
🗠 Metrics	Location Type *:	Rented/Leased 🔹
🛗 Event Servi	Address *:	
🎤 Maintenanc		61313 Northview Drive,,Lexington,KY,40 V
👖 Locations	Move In Date:	
👖 Buildings	Move Out Date:	

Needs & Prayer

Associate appropriate Need & Prayer record to Care Cases





Ready to Go!

Create your first Care Cases and Start Providing Care

Helpful tips as you go:

- Ensure a Platform User is ready to manage Care Cases and review Care Logs in the Platform
- Ensure to use the Description well (use this for Room Numbers, who important people are, etc.)
- Assist your Care Providers by showing them how to save the link to CareLife on their phone's homescreen (Google Phone type and "Add webpage to home screen")

THANKS FOR JOINING US!

