

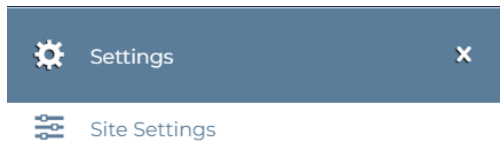
Caregiver Rewards Set-Up and Navigation

Smartcare's Caregiver Rewards tool is a great way to gamify caregiver tasks by offering incentives, rewarding them for a job well done and improving caregiver retention.

Enabling Caregiver Rewards

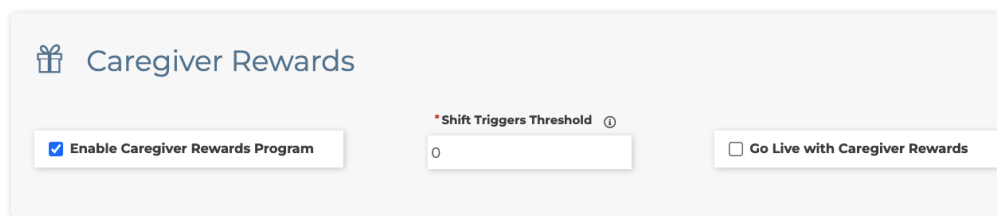
Before setting up Caregiver Rewards, you must enable the function in Settings.

1. Navigate to the Menu and select **Settings > Site Settings**.



2. Under the Caregiver Rewards section, select **Enable Caregiver Rewards Program**.

Note: Do NOT select **Go Live with Caregiver Rewards** until set up is complete!



3. Select **Save Settings**.

Setting up notifications for managers

It is helpful for managers to receive notifications when caregivers redeem awards, badges, or points. To do this:

1. Navigate to **Menu > Settings > Email Notifications**.
2. Under Caregiver Rewards Notifications, enter in the name(s) of the managers to receive each notification.

Caregiver Rewards Notifications

Reward Redemptions

Aisha Moore x Angie Carber x
Gordon Gecko x Jane Gardner x

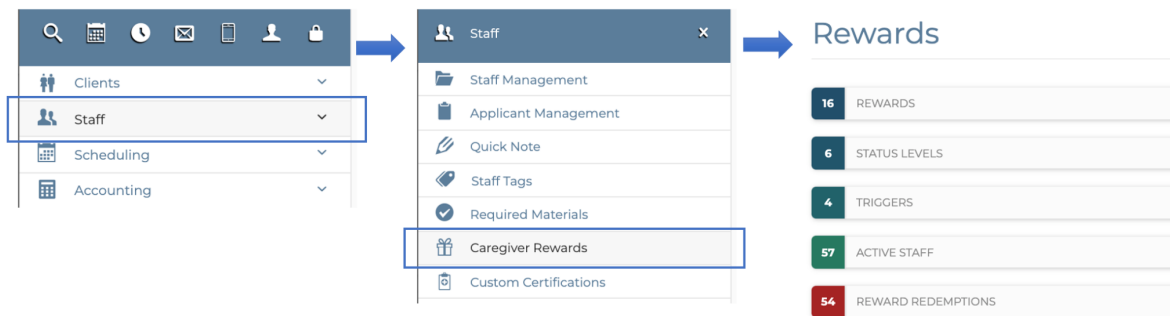
Manual Points

Aisha Moore x Gordon Gecko x
Michael Torres x Heather Cole x

3. Select **Save**.

Managing rewards

To manage Caregiver Rewards, navigate to the **Menu > Staff > Caregiver Rewards**. Here you can control the Rewards you offer, Status Levels, Triggers that earn rewards, awards for Active Staff, and Reward Redemptions.



1. Manage Status Levels

Status levels are optional levels that can be setup for Caregivers to achieve. They define the percent multiplier your Caregivers will receive per level up.

Note: Status multipliers are a great way to reward caregivers for staying with your organization!

ICON	NAME	MULTIPLIER	ANNUAL	LIFETIME	DESCRIPTION	STATUS	ACTIONS
	Nirvana	75%	50,000	500,000	Congratulations on achieving Nirvana. To thank you for your commitment to our organization, your point bonus has now been increased to 75%.	Active	
	Diamond	50%	30,000	300,000	Reaching the Diamond status level is a rare accomplishment! Your point bonus has now been increased to 50%.	Active	
	Platinum	25%	15,000	150,000	Not everyone achieves the Platinum status level! Your point bonus has now been increased to 25%.	Active	
	Gold	10%	5,000	50,000	Achieving the Gold status level is a big accomplishment! From now on you will receive 10% bonus points.	Active	
	Silver	0%	0	0	Achieving the Silver status level is a great first step in our rewards program! Stick with us to unlock more rewards benefits.	Active	

Status Levels are preloaded, but you can edit them to best fit your agency by clicking the orange pencil icon.

Status Level Multiplier Example

Each of these Caregivers takes a shift worth 50 points when completed.

(Percentage multipliers are rounded up when not a whole number. EXAMPLE: 25% of 50 is 12.5. Smartcare rounds this up to 13 points.)



Caregiver 1
 Status Level: Silver
 Point Value of Shift: 50
 Actual Points Received: 50



Caregiver 2
 Status Level: Gold
 Point Value of Shift: 50
 Actual Points Received: 55




Caregiver 3
 Status Level: Platinum
 Point Value of Shift: 50
 Actual Points Received: 63

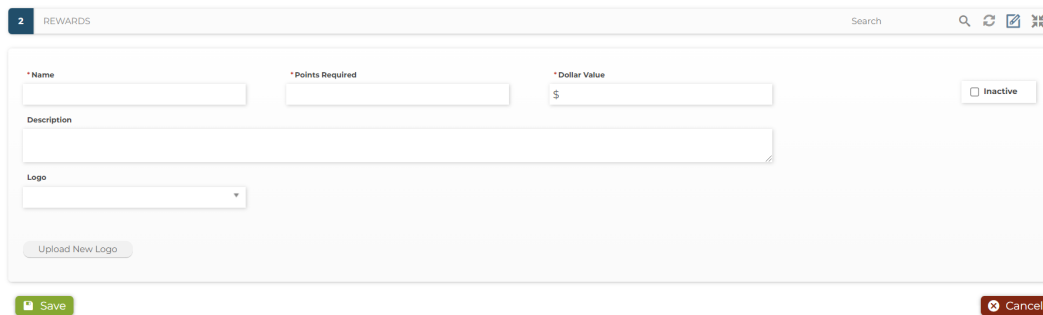


Caregiver 4
 Status Level: Diamond
 Point Value of Shift: 50
 Actual Points Received: 75

2. Manage Rewards

To add new Rewards for your Caregivers to redeem, expand the Rewards bar and select the pen/pad icon  to begin creating the reward.

This pulls up the form to create Rewards:

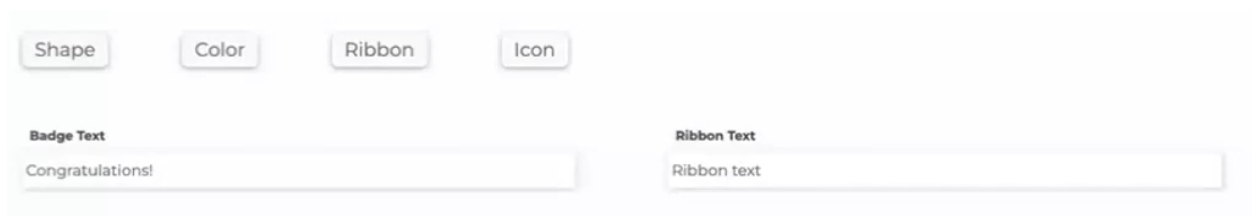



Fill out the reward fields:

- Enter the Name of the reward (ex: Best Buy Gift Card)
- Enter Points Required
- Enter Dollar Value
- Enter a Description of what the reward is (optional)
- Enter a Logo (There are 20 preloaded logos. If you need to add a logo, click Upload New Logo. The image must have a transparent or white background. (Adding a Logo is optional.)
- Click **Save** when complete

3. Manage Badges

Badges can be added as an additional form of recognition for your caregivers. There are many options to choose from that will create endless options of Badge varieties that caregivers will strive to earn.



- a. Select the pen/pad icon  on the Badges bar to create new badges.


- b. Enter a **Name, Description, and Message for the Recipient** for the badge you wish to create.

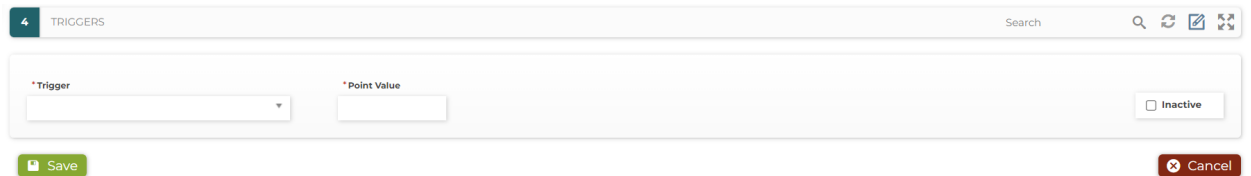
Note: The Message will be sent as a push notification and an email when the Badge has been achieved. (This must first be enabled in Site Settings.)

- c. Select **Shape** to customize the badge.
- d. Once you have selected a Shape, you will be able to customize the **Color**.
- e. Once you have selected a Color, you will be able to customize the **Ribbon**.
- f. Add an icon to the Badge by selecting **Icon**.
- g. Customize the Badge by entering **Badge Text** and **Ribbon Text**.
- h. Click **Save** when complete.

4. Manage Triggers

Triggers are the actions that will tell Smartcare which shift qualities will add points to a Caregiver and how many points each shift quality is worth.

Click the pen/pad icon  on the Triggers bar to add new triggers. This opens up the form to create triggers.



- Click in the **Trigger** field and select a trigger from the menu
- Enter a **Point Value** for when this trigger occurs
- Click **Save** when complete

5. Manage Active Staff

In the Active Staff section, you can track Caregiver points and manually remove or add points or badges. To open up these options, click on the bar labeled Active Staff within the Caregiver Rewards section of the website.

Note: Caregivers CAN view all points and badge history.

- To add Reward Points to a Caregiver, Click the + icon in the Actions column.
 - This opens a box that allows you to give the caregivers points, provide context for these points, and provide a note. All of these sections are required. Click **Save** when it is complete.
- To add Badges to a Caregiver: Click the badge icon in the Actions column.



- Select the name of the Badge you have created from the dropdown.
- Enter a **Note** (Subject) that will be sent to the recipient, as well as a longer **Message** (Body).
- Click **Save** when it is complete.

 A form titled "+ Add Points" with the smartcare logo in the top right. The form contains the following fields:

- A text input field for "Points".
- A dropdown menu for "Re:" with "General/Manual" selected.
- A text input field for "Note".
- "Save" and "Cancel" buttons at the bottom.

- To **remove points** from a caregiver, click on the "-" on the right side of their name.

	NAME	LIFETIME POINTS	REDEEMED POINTS	CURRENT POINTS	POINTS TO NEXT REWARD	ACTIONS
+	Katelyn Avery	5,649	0	5,649	0	+ - ↻ Remove Points
+	Brad Carlson	0	0	0	30	+ - ↻

This will open a pop-up menu that allows you to remove points from a caregiver, provide a reason for why points are being taken away, and provide a note. All of these sections are required. When fields are complete, click **Save**.

- To **view the entire history** of any caregiver's reward points, click the **View History** icon to the right of the "+" and "-" icons.



This generates a complete list of the caregiver's *points earned, points revoked, and point redemptions.*

6. Manage Reward Redemptions

Use this section to track Caregiver Redemptions and mark when you pay them. Click **Reward Redemptions** to open this section of caregiver rewards.

An empty checkbox under **Processed** means the reward has not been processed on the manager's end.

44 REWARD REDEMPTIONS									
LOGO	EMPLOYEE	REWARD	POINTS	VALUE	CREATED	NOTES	PROCESSED		
	Mike Nalley	Starbucks Gift Card	1,000	\$8.00	Mon, Nov 8, 2021		<input type="checkbox"/>		

When you receive an email that a caregiver wants to redeem a gift, and you pay them out on the reward, click the checkbox. A pop-up dialog asks you to confirm the redemption. Smartcare recommends you note how the gift was sent or received. Click **Confirm** when complete.

✓ Process Reward smartcare software

Confirm the reward has been processed and delivered to the employee. Leave any requisite notes in the field below.

Admin Note

Going live with Caregiver Rewards

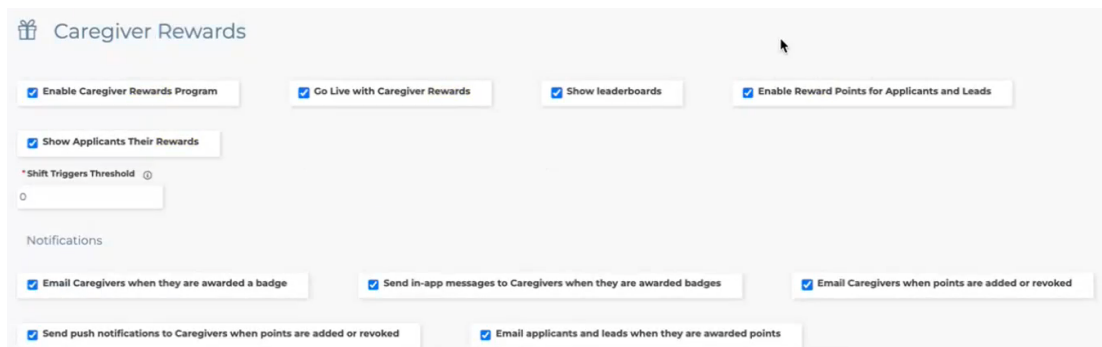
When your Caregiver Rewards setup is complete, you can go live with Caregiver Rewards.

Note: Check ALL settings before going live.

1. To **Go Live** with caregiver rewards, go to **Menu > Settings > Site Settings** and scroll down to the **Caregiver Rewards** section.
2. Select **Go Live with Caregiver Rewards**. Your Caregiver Rewards program is live!



Note: This may be a good time to review your Site Settings and Notifications enabled.



- When **Show Leaderboards** is enabled, staff will be able to see the points and badges leaderboards on their MySmartcare page and in the mobile app.
- When **Enable Reward Points for Applicants and Leads** is enabled, the following triggers are enabled to support the hiring process: Hiring Bonus Points; and Points During Hiring Process.
- When **Show Applicants Their Rewards** is enabled, applicants can see their current points, redeemable rewards, rewards to pursue, and status level when they are signed into Smartcare. They will not be able to redeem rewards until they are hired.

Caregiver Rewards Tips

1. Accountant and staff management roles see Caregiver Rewards on their KPI dashboard.
2. Staff Manager roles WITH Caregiver Rewards privileges turned on will only see Caregiver Rewards within their Menu options.
3. Every 6 hours, Smartcare checks shifts from the last 12-hour span and updates points if necessary.

4. Points are added after clock out.
5. You must manually adjust points if a shift is edited 12+ hours after clock-out.
6. Create a **Redemption Message for Caregivers** that will pop up when a caregiver redeems a reward. (This is available at the top of the page under **Menu > Staff > Caregiver Rewards.**)

Caregiver Rewards Leaderboards

A little bit of friendly competition can motivate almost anyone. With Caregiver Reward leaderboards, you will create a team environment that sees and recognizes the effort your employees put in to contribute to the mission of your organization. To do this:

- Enable **Show Leaderboards** in Site Settings.
- Navigate to your MySmartcare page and you will see **Leaderboard** listed under Rewards.
- Available on the app or on a desktop, you and your caregivers will be able to see the Leaderboard, filtered by calendar year or all-time.

LEADERBOARD
SHOP
HISTORY

Achievements

< My Rewards
Caregiver Rewards

Leaderboard

Year
All Time

Rank	Name	Level
1	Jimmy B.	Nirvana
2	Serena S.	Nirvana
3	Tim S.	Nirvana
4	Jared Anderson P.	Platinum
5	Joe B.	Platinum
6	Johnny D.	Silver

7 Achievements Leaderboard

YEAR ALL TIME



RANK		NAME	LATEST
1		Joe B.	
2		Jimmy B.	
3		Three Points F.	
4		Tom B.	