



# Start of Care Handbook

## Table of Contents

02

---

### Welcome to TheKey

Who's Who at TheKey: The Care Team and their roles, office hours and contact info

06

---

### Your First 90 Days of Care

Days 1-30, 31-60, 61-90, What is typical and what is not typical in care

10

---

### Feedback

Where to share your experience

11

---

### Family Room App

How to log in to Family Room to check schedule, shift notes, care plans and contact info for your care team

14

---

### Versapay

Frequently asked questions about our billing software

16

---

### Medallia

FAQs about our client survey platform

# Welcome to TheKey

*The care you need in the place you love.*

Starting care at home is a significant step. Whether it's a proactive choice or a response to sudden change, we're honored to be part of your journey. We're here to make the transition as seamless and supportive as possible.

This guide outlines who we are, what to expect in your first 90 days, how we communicate, and how we partner with you to ensure care is working at every step.

---

## **Who's Who at TheKey | Meet Your Care Team**

You're not just receiving care—you're backed by a full team of professionals committed to your experience.

When you begin care with TheKey, you're supported by more than just a caregiver. Behind the scenes is a thoughtfully coordinated team working to ensure every aspect of your experience is smooth, responsive, and personalized. Here's who you can expect to interact with and how each person contributes to your care.

Your Client Success Manager is \_\_\_\_\_, and they can be reached at \_\_\_\_\_ during normal business hours, 9am - 5pm. For after hours and weekend support, please call our office line at \_\_\_\_\_. Any calls made directly to your CSM during after hours and weekends may not be answered or returned until the following business day.

- **Client Success Manager (CSM)** - Your CSM is your primary point of contact and your personal advocate. They oversee your care journey from start to finish, ensuring consistency, coordinating services, adjusting care plans, and checking in regularly to make sure everything is aligned with your evolving needs. Whether it's a simple schedule change or a bigger conversation about long-term support, your CSM is here for you.
- **Caregiver Manager (CGM)** - The CGM leads the scheduling and oversight of your caregiver team. They ensure each caregiver is properly briefed, introduced, and supported so you receive consistent, reliable care. Your CGM and CSM work together to train and guide caregivers to deliver care in alignment with your specific preferences, routines, and goals.
- **Caregiver** - Our caregivers are at the heart of what we do. Carefully selected, trained, and supported, each caregiver is matched with your needs in mind, based not only on experience and skills, but also personality and communication style. At TheKey, our caregivers are trained to go beyond the basics. Using our Balanced Care Method<sup>®</sup>, they support the whole person (mind, body, and spirit) ensuring that care is not only safe and reliable, but also enriching, respectful, and attuned to what matters most in your daily life.
- **General Manager** - The General Manager oversees local operations to ensure your care team is well-supported, responsive, and operating at the highest standards. While you may not interact directly with the GM often, they work closely with your CSM and CGM to ensure your experience reflects TheKey's commitment to excellence.
- **Executive Leadership at TheKey** - Behind every local team is our national leadership group of seasoned professionals with deep expertise in home care, home health, hospice, quality assurance, operations, compliance, and caregiver support.
  - Our CEO, Chris Gerard, brings over 30 years of experience in home health, hospice, and personal care. He has held executive leadership roles in some of the nation's top healthcare companies and is committed to advancing high-quality, person-centered care for older adults. Under his leadership, TheKey is setting a new standard for what in-home care can—and should—be.

## Office Hours and After-Hours Service

TheKey provides private home care services 24 hours a day, 7 days a week. Our office hours are Monday through Friday from 9:00am-5:00pm.

(xxx) xxx-xxxx

This number is answered 24/7. During normal business hours, calls are answered by our team of Staffing Specialists. After normal business hours, holidays, and on the weekends, all calls are answered by TheKey after-hours support.

This highly trained team can triage your call and will reach out to the appropriate team member to relay any service-related emergencies that require immediate attention.

They also have access to our ClearCare system which contains important agency information such as client schedules, client profiles, and caregiver information. If the after-hours support team is not able to assist you, they will contact the assigned-on call person from the local team.

Your call will be returned within 30 minutes. If the call does not require immediate attention a message will be taken, and a call will be returned on the next business day.

Note: Our services are non-medical

For medical, police, or fire emergencies call 911

Other important departments ready to serve you include:

**Billing:** Billing@TheKey.com - (866) 226-1702

**Long-Term Care Insurance:** LTCi@TheKey.com - (866) 226-1702

NOTE: Please call our office to notify us if the client is admitted to the hospital or taken to the emergency room, has had a fall, or may have sustained any injuries, or is sick with highly transmitted diseases like COVID, Influenza, or Monkeypox for example.

## **Your Treatment Plan**

The plan of care is facilitated and written by the RN/Client Success Manager, but it is a collaborative effort between the client, family members, and anyone else involved with the client's care. A paper copy of the care plan stays in the home and a copy gets uploaded in the client's electronic medical record with TheKey. The tasks are then communicated with the caregiver and shared digitally through an application that provides the tasks into a form where they can chart on their duties performed, how the client is doing, and anything else they want to tell us that is not urgent. The caregiver can only perform tasks that have been assigned by the RN and agreed upon when the care plan was written. It is reviewed frequently, and changes can be made, but only from the nurse.

Tasks are determined by the needs of the client. CHHA's are licensed by the state, specially trained and must work within their scope of practice. Examples of what CHHA's can help you with are personal care, help with mobility, meal preparation, assisting you to appointments, and light housekeeping. Personal care includes bathing, dressing, grooming and toileting. Mobility might look like a walk in the park together or helping someone who is bed bound to transfer into a wheelchair. They may also help you to remember when to take your medications, but because they are not nurses, they cannot make medication decisions for you as that is not in their scope of practice. In addition to assistance with personal care and basic needs, The Key caregivers are just as likely to help clients in the garden, play a game of cards, read the newspaper to you, and provide companionship. We also have specialty programs that provide activities to do together such as the Balanced Care Method<sup>®</sup> and Cognitive Therapies for keeping the mind sharp.

If there is a task you would like to have some help with, please discuss this with your Client Services Manager and they will help guide you.

# Your First 90 Days of Care

## Days 1–30: Building the Foundation

The first month is about getting to know you, including your routines, your needs, and what makes care feel right. We're here to make that transition as smooth, supportive, and personalized as possible.

### What You Can Expect:

Even great care takes time to feel natural. During the first month, we focus on:

- **Care plan Customization** – We start with your documented plan and adjust as you adjust to care. Your care needs may change, and your care plan will be updated to reflect the most up-to-date information. Care is not one-size-fits-all. As we learn more about what works best for you, or if your needs change, we'll make thoughtful updates to your plan and work with you and your care team to help provide smooth transitions.
- **Adjustment Period** - It takes time to build trust. You're getting used to having someone in your home, and your caregiver is learning your routines, preferences, and personality. We'll work with you to ensure that your care team aligns with your preferences over time.
- **Consistent caregiver routines** – Consistency is always our goal, but it takes time to nurture. It is common to see a few new faces at the start of care while we work to identify the strongest care team possible. If we've truly missed the mark, we offer our **Satisfaction Guarantee**, allowing you a complimentary next shift to provide a better match.
- **Frequent check-ins** – You will receive check-ins from your **Client Success Manager**, especially in the first few weeks, to ensure things are on-track, as well as periodic surveys from **Medallia**, our secure feedback platform. These may ask about your overall care experience or specific interactions.
- **Occasional caregiver changes and substitutions** - Home care is a human-centered service, and occasional caregiver absences due to illness, family emergencies, or personal obligations are expected. While we work diligently to minimize these disruptions, it's important to know that they can happen. When they do, your local office, as well as our on-call team, is always ready to step in and coordinate appropriate coverage.

## **Days 31–60: Building Consistency, Refining the Fit**

By now, care is becoming more familiar. Routines are taking shape, trust is building, and we're learning more about what helps you or your loved one feel truly supported—not just safe, but seen and understood.

### **What You Can Expect**

- **Greater continuity** - By this stage, most clients begin to see a regular, familiar care routine. Core caregivers are reliably scheduled, and they've had time to get to know your needs, preferences, and home environment. This consistency should help increase comfort and support stronger day-to-day care.
- **Refinements to the care plan** - We regularly review and update your care plan based on what we're seeing, what you're telling us, and what matters most to you now. These updates might include new routines, updated safety measures, or enrichment activities based on your interests.
- **Follow-up from your CSM** - Your **Client Success Manager** will continue to check in during this phase (either by phone, text, or in-person). We want to make sure care is not only meeting expectations but evolving with your needs.
- **Problem-solving, not perfection** - If something's not quite right (whether it's the caregiver match, communication, or daily tasks), we'll work with you to adjust. This period is often when small issues come into focus, and we welcome that. It helps us improve.

## **Days 61–90: Strengthening What Works, Planning Ahead**

At this stage, care should feel more stable, consistent, and personalized. You've built rapport with your caregiver(s), and we've had time to observe, adjust, and fine-tune how we support you. Now, we focus on proactively strengthening what's working and refining anything that isn't, so that care continues to meet your needs, align with your lifestyle, and evolve with you over time.

### **What You Can Expect**

- **Stability in the care team** - Your core caregiver(s) should now be familiar, comfortable, and well-integrated into your daily life. If there are still any concerns about consistency, fit, or communication, your CSM will work with you directly to resolve them.
- **Proactive care plan updates** - We review your care plan regularly to reflect any changes in health, preferences, routines, or goals. This might include adding safety precautions, adjusting schedules, or incorporating more enrichment, engagement, or cognitive support.
- **Longer-term planning conversations** - Your **Client Success Manager** may check in to explore what's ahead—whether you're planning travel, considering an increase in hours, or preparing for changes in health. This is also a time when families supporting from a distance often want a more structured check-in.

## **Not Typical—Please Let Us Know If You Experience:**

- **Care that feels rushed, transactional, or task-only** - Care should feel attentive and human—not like someone is just checking boxes.
- **Caregivers spending excessive time on their phones** - Our caregivers use their phones for important tasks related to their job and your care, including accessing the care plan, reporting on tasks and clocking in and out, so it's expected that you will see them using their phone. However, they are expected to remain present and use downtime to provide proactive support, stimulating engagement or other social activities.
- **Infrequent or unclear communication from your care team** - You should always know who to contact, and hear from us regularly—especially when care is new or changing.
- **Feeling like you have to manage your own schedule** - That's our job. Our caregiver managers and client success managers work diligently to ensure your care needs are scheduled, covered, and communicated with you in a timely fashion.
- **Caregivers arriving unfamiliar with your care needs** - Your caregivers should always arrive knowledgeable about your care plan and the unique needs of your loved one. Our operations team works hard to ensure each caregiver is thoroughly briefed and appropriately skilled before their first visit.
- **Delayed Responses to Urgent Needs** - Our on-call team is available 24/7. If you're ever left waiting for help in a time-sensitive situation, we need to know immediately.

If **anything isn't meeting your expectations, reach out directly**. We want to resolve concerns quickly and ensure your care is exactly what it should be.

---

# Feedback

## Ongoing Support & Communication

You will have **phone, text, and email access** to your Client Success Manager (CSM) during working hours. They are your primary contact for every aspect of your care, including billing questions, feedback about caregiver performance, or schedule changes. Our **On-Call team** is available to support during off hours, overnights and weekends, because care doesn't revolve around business hours. Rest assured that our team is available to support, day or night.

Prefer a certain communication style or cadence? Let us know—we'll adapt. If you're unsure how to reach your CSM, please email **quality@thekey.com** and we'll connect you right away.

## Your Voice Matters And Makes a Difference

Great care is built on partnership. That's why we actively seek your input so we can refine what's working and fix what's not.

We gather feedback in two ways:

- **Direct check-ins from your CSM** - You'll hear from your CSM regularly, especially in the early stages of care. This is your chance to share updates, preferences, or concerns in real time.
- **Medallia Surveys** - You'll also receive brief email surveys from **Medallia**, our secure, third-party feedback platform trusted by leading organizations to deliver best-in-class service experiences:
  - Your overall care experience
  - Specific visits or interactions with your caregiver or CSM
  - How we're doing and how we can do better

Your responses are reviewed closely by both your local team and our national Operations and Quality teams. They help us:

- Identify training opportunities
- Improve responsiveness
- Recognize and celebrate excellent caregivers and staff

**Thank you in advance for sharing your feedback.** Your voice directly shapes how we care for you and impacts every family we serve.

# Family Room App

You and your family members or trusted points of contact will be enrolled into WellSky's Family Room Portal. WellSky is our scheduling system that we use to manage all of our clients, and the Family Room can provide real-time, important information about you or your loved one's care, including:

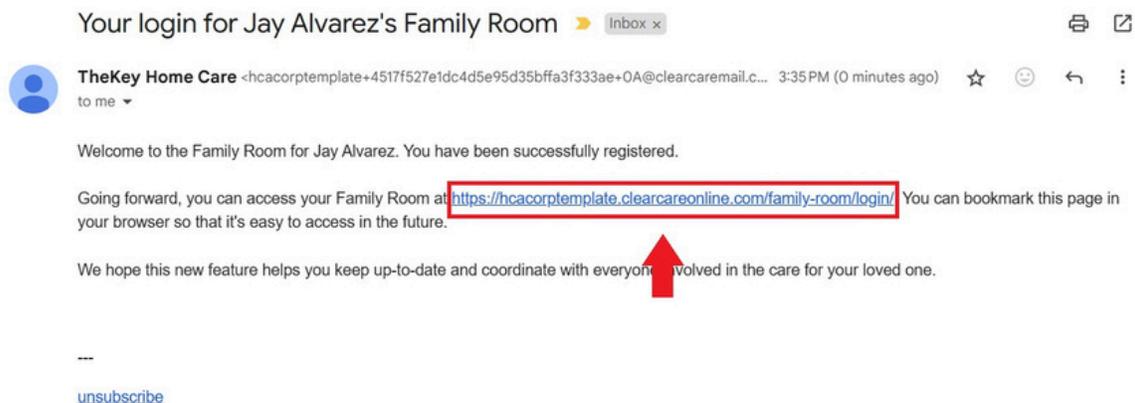
- Real-time Schedule Updates
- Daily Caregiver Shift Notes
- Up-to-date Care Plans
- Contact information for your local office team

At the start of Service, you and your CSM will determine who should be signed up for the family room portal. For more detailed information regarding logging in and user interface, please see our Family Room User Guide in the following pages.

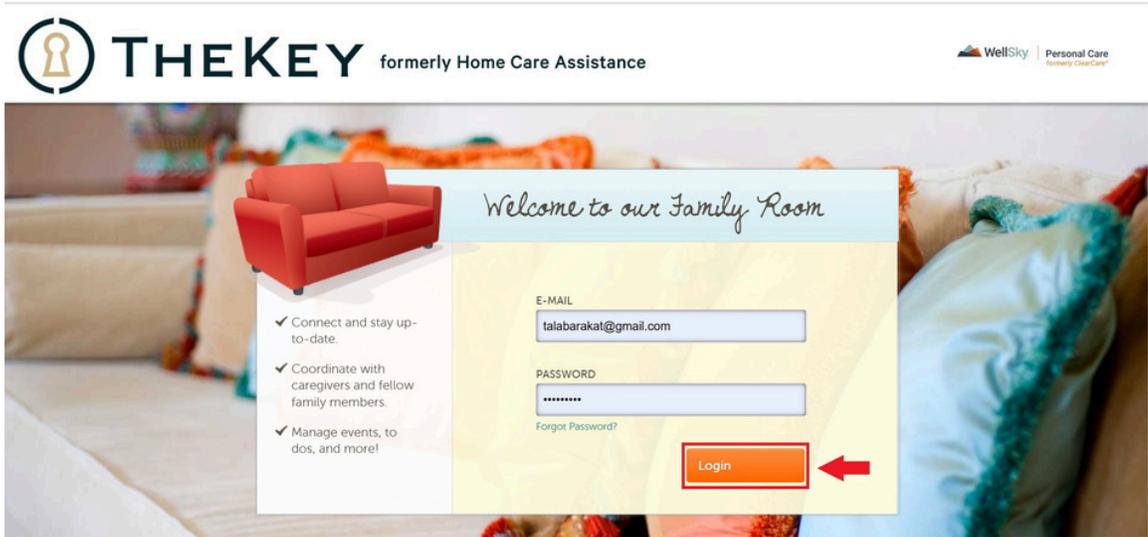
## Family Room Login and User Guide

### How Login to the Family Room App

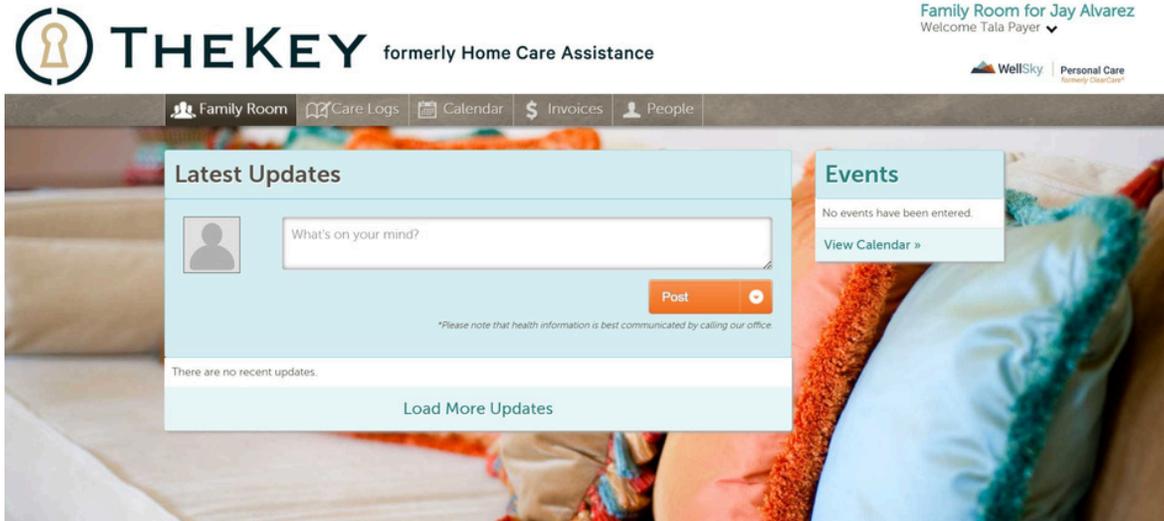
You will receive a confirmation email. From the confirmation email, click the link.



Type in your login credentials and click the Login button:



You are now logged into the Family Room.



family room app user guide?

# Versapay | FAQs

- **Do I have to use the Versapay online portal to pay?**
  - No, you do not have to use the online portal to pay although it is encouraged. You can provide a method of payment to your local office by completing the payment authorization form, or by logging into your Versapay account to enter that information and enroll in what's called AutoPay.
- **What is AutoPay?**
  - AutoPay means we will automatically debit your method of payment two days after we send you the invoice notification via email with the attached PDF invoice. This allows you two days to review your invoice and let billing and/or your local office know if you disagree with charges and will ensure your account is kept up to date.
- **How do I set up AutoPay or add a payment method to use for one-time payments?**
  - Once you are logged into your account you can enroll in AutoPay by clicking "*Sign Up for AutoPay*" in your Versapay account. This link is available in the Invoices, Payments, Activities, and Documents view.
  - From here, you can select "*New*" next to "*AutoPay is Off*", to enroll in Autopay using the existing payment method on file. In the case below, if you selected "*New*", it would enroll the Visa card ending in 4583 to auto debit based on your payment terms. Or you can add a new payment method under "*Add Bank Account*" or "*Add Card*".
  - If you start by selecting the "*New*" option, you will be prompted to select the payment method to use for Autopay. To follow, you can choose to have your payment method run for your entire open balance (Select "*Let AutoPay pay these according to the specified criteria*") or just new invoices that generate from the point of enrollment forward (Select "*I will pay these myself should pay my new invoices only*"). Choosing not to pay your past due balance does not mean the balance is not due or that you've disputed charges, we will review how to dispute charges later in this document.
  - If you choose to enroll in AutoPay using the "*Add Card*" or "*Add Bank Account*" elections, the option to pay your existing balance will only appear if you enroll in AutoPay.

## Versapay | Frequently Asked Questions (Continued)

- **How do I view and pay my open invoices?**
  - To view your open invoices, you can click into the Invoices page of the portal, select “Open Items” and “All” dates.
  - To pay all your open invoices you can select the check box next to the Division name and select “Pay” or select “Pay All” on the upper right corner of the screen.
- **Can I cancel Autopay?**
  - AutoPay can only be turned off by your billing representative, however, you can change what account or card you use to pay as often as you’d like.
- **How do I dispute an invoice if I disagree with a charge or fee on my invoice?**
  - When viewing the invoice in Versapay you should scroll to the bottom of the PDF under attachments and select “New Comment/Open Dispute” and indicate why the invoice is incorrect in the comment box. From here, you should select “Comment” in the bottom right corner of the page to save your dispute.
  - This feature will prevent AutoPay from running your card/account for the specific invoice disputed and alert the billing team to act.
- **Can I communicate with my billing contact without disputing an invoice?**
  - Yes. At the top of your screen, you will see an option to “Send a Comment”. You can select this option, add your comments/questions, attach an image if you’d like to, and select “Comment” to save and send it. This is not the same as disputing an invoice and will not prevent AutoPay from running so it’s important to use the “Dispute” method if there is a true dispute to resolve before you pay.
- **Can I add contacts to my account so others can receive and pay invoices?**
  - Yes, you can click your user profile menu at the top right corner of your account. On the left, select “Users” in the menu and then “Add User”.
  - Once the email is added and a role is selected, you can click “Invite User” and the system will send them an invite to enroll using a unique and secure username and password. Added users can login at their discretion to pay all or a portion of the invoices due however, in current state we cannot select users to pay portions of invoices through the Autopay feature.
- **How do I login to the system?**
  - You will receive an invite from the Versapay platform when you receive your first invoice. It’s important to note Versapay is compatible with Firefox, Safari and Internet Explorer, however the preferred browser is Google Chrome. If you cannot access the system via the system generated invite you can use this link to visit the website directly: <https://secure.versapay.com/>
  - In order to reset your password once registered, visit: <https://secureadmin.versapay.com/users/password/new>

# Medallia | FAQs

- **What is Medallia?**
    - Medallia is TheKey's client survey platform. We send periodic surveys to understand how we are doing, what we could do better, and where things are working well.
  - **How Often Will I Get Surveys?**
    - Start of Care (day 14)
    - Billing feedback (day 30, and every 60 days thereafter)
    - Ongoing followup (day 60 and every 90 days thereafter)
    - End of care
  - **Where can I submit feedback on the survey program?**
    - Please contact our Quality Team: [medallia-support@thekey.com](mailto:medallia-support@thekey.com)
- 

## **This Is Just the Beginning**

With over 20 years of experience providing in-home care, we know what it takes to deliver excellence not just once, but every day. Our approach is proactive, personalized, and grounded in clinical insight, communication, and consistency.

We're here to support your goals, respect your routines, and adapt as your needs evolve. If something isn't working, we'll fix it. If something could be better, we want to know. Great care isn't just what we do, it's who we are.