Frequently Asked Questions (FAQs)

Topics:

- Getting Started in eCare Vault
- Creating and Managing a Team
- Collaborating with Team Members
- Other FAQs
Getting Started in eCare Vault

Q. What is a Vault Key?
A. The Vault Key is a secondary password that the user will create to ensure their account is extra secure. You are encouraged to create a Vault Key that is different from your password but it is not mandatory.

Q. Who is a Care Recipient?
A. Anyone you are providing care for (family member, student, client, patient).

Q. What is my Care Feed?
A. It is your most recent care activity over time, including recent documents and discussions that have been shared with you.

Q. What is the Care Recipient Profile?
A. This is the column located on the far right that celebrates the Care Recipient with featured photos and fun, interesting information about the Care Recipient. This area is visible to all members of that Care Recipient’s team.

Q. Is the information I put into eCare Vault safe?
A. Yes, eCare Vault is both HIPAA and FERPA compliant. eCare Vault also uses a no-view cloud service platform which means that we can’t see your information either!

Q. How will I be notified of what is happening within my eCare Vault account?
A. You will receive a daily summary email of everything that has happened in your account within the last 24 hours. You will also see notifications within the application with the notification bell icon.
Creating and Managing a Team

Q. What is the difference between a Care Team and a Project Team?
A. A Care Team is built around an individual, such as a student, client, patient or family member. A Project Team is built around an incident, new initiative or best practices.

Q. Who is a Team Member?
A. A trusted member of the care team that provides care/services for the Care Recipient (i.e. adult child, parent, therapist, teacher, home health aide).

Q. What does a Team Member do?
A. Share documents they have uploaded, share and complete forms, and have discussions and connect with other team members.

Q. Does someone have to already be using eCare Vault to be invited to a team?
A. No, anyone can be invited to a team as long as they have an email address!

Q. How long does an invite to join a team last?
A. An invite will stay ‘live’ for 30 days. After that, the person invited can always create an eCare Vault account, but will not have access to the Team unless they are invited again.

Q. How do I accept an invite to join a Team?
A. You can accept the invite by clicking the link in the email notification. You can also login to the application and select the button on the top right corner and click Accept.

Q. Once I have accepted an invitation and logged in can I add other Care Recipients?
A. Yes! You can add any Care Recipients to the platform that you provide care for and invite their specific team members to join their team.

Q. Who can add/remove members to the team?
A. The Team Captain and Co-Captain can add/remove team members from a team. They can also onward share any documents shared with them.

Q. What happens when a member leaves a Team?
A. Once a member leaves a Team, they will not have access to any new documents, forms or discussions. However, they will still have access to any materials shared before they left.

Q. Can a Team Captain leave a Team?
A. A Team Captain must transfer ownership before leaving a Team. They do this by selecting a new Team Captain. Once they have transferred ownership, they automatically become a Team Co-Captain.
Collaborating with Team Members

Q. Who can see photos I upload to the Care Recipient profile?
A. All team members can see photos uploaded to the Care Recipient profile.

Q. Who can see documents I upload into eCare Vault?
A. Only you and the members of the team you choose to share the document with on the team. Once a document has been shared with another team member, it cannot be unshared. You can also just store documents and not share them with anyone on the team.

Q. When sharing a document, what is the difference between “view-only” and “view and download”?
A. If you share a document with “view-only” this means that they can only view the document within eCare Vault, they cannot download the document onto their computer. “View and download” means that you are allowing the person you are sharing the document with to both view the document and download it.

Q. Can I share documents with team members that have been invited but have not yet accepted the invitation?
A. Yes! Anyone that has been invited to the team or is currently on the team will appear on the list for sharing documents. The document you shared with them will be waiting for them when they accept the invitation and log in.

Q. Can Team members share documents with individuals outside of a Team?
A. Sending a shareable link allows you to send a link to the document you would like to share with someone outside of the team. The link expires after 48 hours for security reasons and the person viewing this document is only able to see the specific document and nothing else.

Q. Can individuals outside of a Team share documents with a Team?
A. Yes, individuals that do not have an eCare Vault account can fax documents and have them directly shared with a Team in a HIPAA compliant manner.

Q. Can I delete documents I have uploaded?
A. Yes, very simply choose the button next to the document and click delete. If these documents have been previously shared, they remain visible to those that the document has been shared with. Same is true for discussions.

Q. What is the ‘Shared with Me’ folder?
A. This folder was created for you by eCare Vault and cannot be deleted or renamed. All documents shared with you will automatically appear in this folder. You will be able to move documents out of this folder to the main documents page or to another folder that you have created.
Q. Who can see folders I create in eCare Vault?
A. Only you can see the folders you have created. You cannot share your folders with other eCare members and vice versa. But, you can still share individual documents with others.

Q. Can I create a folder within a folder?
A. Yes! You can create nested folders as a way to better organize your documents. You can also put documents from different Care Teams into the same folder. The way you organize your folders is completely up to you!

Q. How do I see which members are able to view my shared materials?
A. For documents, discussions and forms, selecting the button will allow you to see which members have permission to view. You can also see who has viewed the document or discussion by selecting the button.

Q. Can I communicate with my care team via eCare Vault?
A. Yes! You can use the discussions option and click start a discussion to collaborate with the team. Instead of email, we strongly encourage you to use eCare Vault to communicate with team so all information is protected.

Q. Who can see the discussion once I have started a discussion?
A. You determine who can see the discussion by selecting the appropriate team members for that discussion. Those that are added to the discussion, at any point, are able to see the discussion in its entirety. This includes any comments that occurred before they joined the discussion.

Q. Can I request a signature or initials when assigning a form?
A. Yes! You can use the Document eSign function to either Set up Signatures or Apply Signature Template. You can customize the signature or initials by assigning it to a member, adding a date or adjusting its location on the form. You can also add as many signatures as you need to a document.

Q. How do I follow-up with team members after I have assigned them a form?
A. After you have assigned a form to a team member, you can click the Remind Now button located next to the form (on the Assigned Forms tab) to send them a reminder. Once the form has been submitted, it will no longer appear on the Assigned Forms tab, but will reappear on the Submitted Forms tab.
Other FAQs

Q. Can I search within the application to find something?
A. Yes, using the magnifying glass icon on the top right of the application you are able to type the keywords directly into the icon. You can filter the search by team member, title and date.

Q. Can I organize my discussions and documents by Team?
A. Yes, using the Team Selector on the top left of the application you are able to select a Care or Project Team. Once a Team is selected, only documents, discussions and forms associated with this Team will be visible on the application.

Q. Can I organize my discussions and documents into Folders?
A. Yes, when you click on the documents portal, you have an option to create new folders and move existing documents to these folders.

Q. Am I able to integrate eCare Vault with other platforms or systems I am using?
A. Yes, please contact us if you would like to integrate with other systems.

Q. What is the maximum document file size that I can upload?
A. Your document can be up to 65 MBs.

Q. Can I use eCare Vault on my phone?
A. Yes! You can download the free app for both Android and iOS.

Q. How do I find the mobile app on the App Store?
A. Search 'ecare vault - build care teams' on the App Store. Don’t forget to allow push notifications when prompted. This will ensure that you stay up-to-date with all activity.

Q. What if I need help while using the application?
A. Contact us! You can select contact us at the bottom of the page, fill out your information and the issue you need help with and hit submit. We will contact you within 24 hours. You can also contact us over email at help@ecarevault.com.

Q. Where can I learn more in the application?
A. If you need a quick refresher on how to do something, click on the small question mark on the left side of the screen. Here you can select the topic you need help with and take a quick tour!