# CareCarma

## It Starts With Family


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# INTRODUCTION

**How Can CareCarma Help You**?

Once upon a time, family members all lived in the same small community, sometimes even under the same roof. If someone needed support, you could simply reach out and touch them. This ancient, localized support system largely disappeared with the emergence of the modern nuclear family. Today, the family is often dispersed across an entire continent, sometimes around the world. So, how can we provide care to our elders or other members of our family who have had an accident, a sudden illness or even to a new mother and father with a newborn baby?

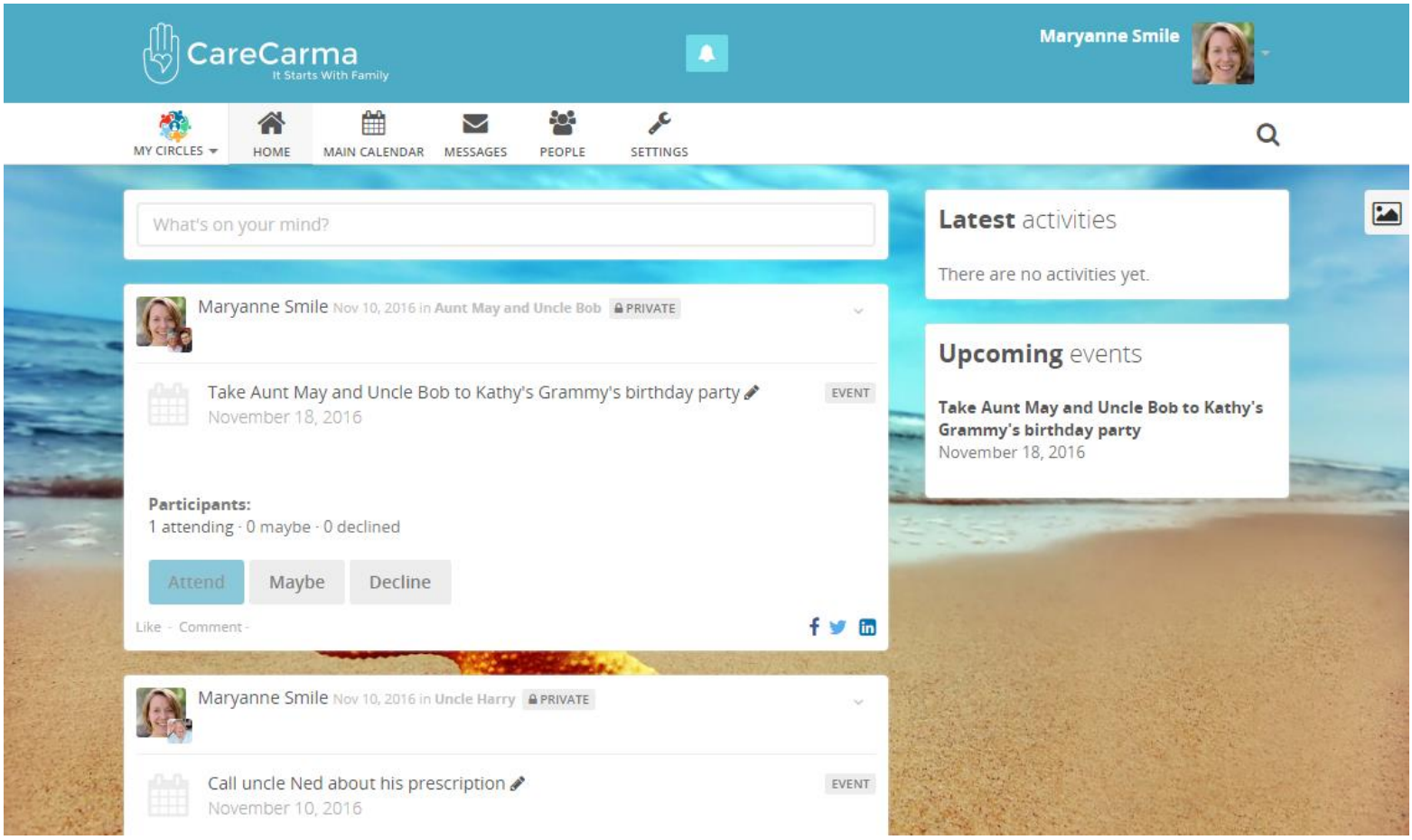
Suppose there was a way to close the distance between family members by reuniting them in a virtual community. A place where they could once again simply reach out and touch each other when in need.

At CareCarma, our mission is to help people build that community, one family at a time. CareCarma is built upon four pillars:

1. **CareCarma Circles** helps you organize your family into a care team that can bring support to family members in need.
2. **CareCarma CoSMoS** helps family members connect, interact and communicate more easily, reliably, and productively.
3. **CareCarma Communities** brings Circles together with others that have special expertise and/or who are local to geographically distant family members in need.
4. **CareCarma Contacts** provides easy access to other, outside resources and services, if and when you need them - from finding a home cleaning service to finding a live-in caregiver.

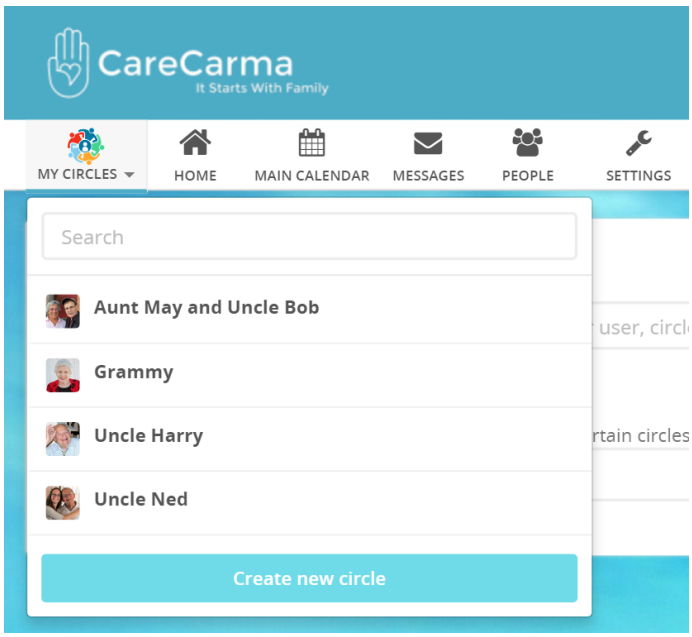
**CareCarma Home Page**

From here you can access information for all of your activities in all of your circles and communicate with the entire CareCarma community.



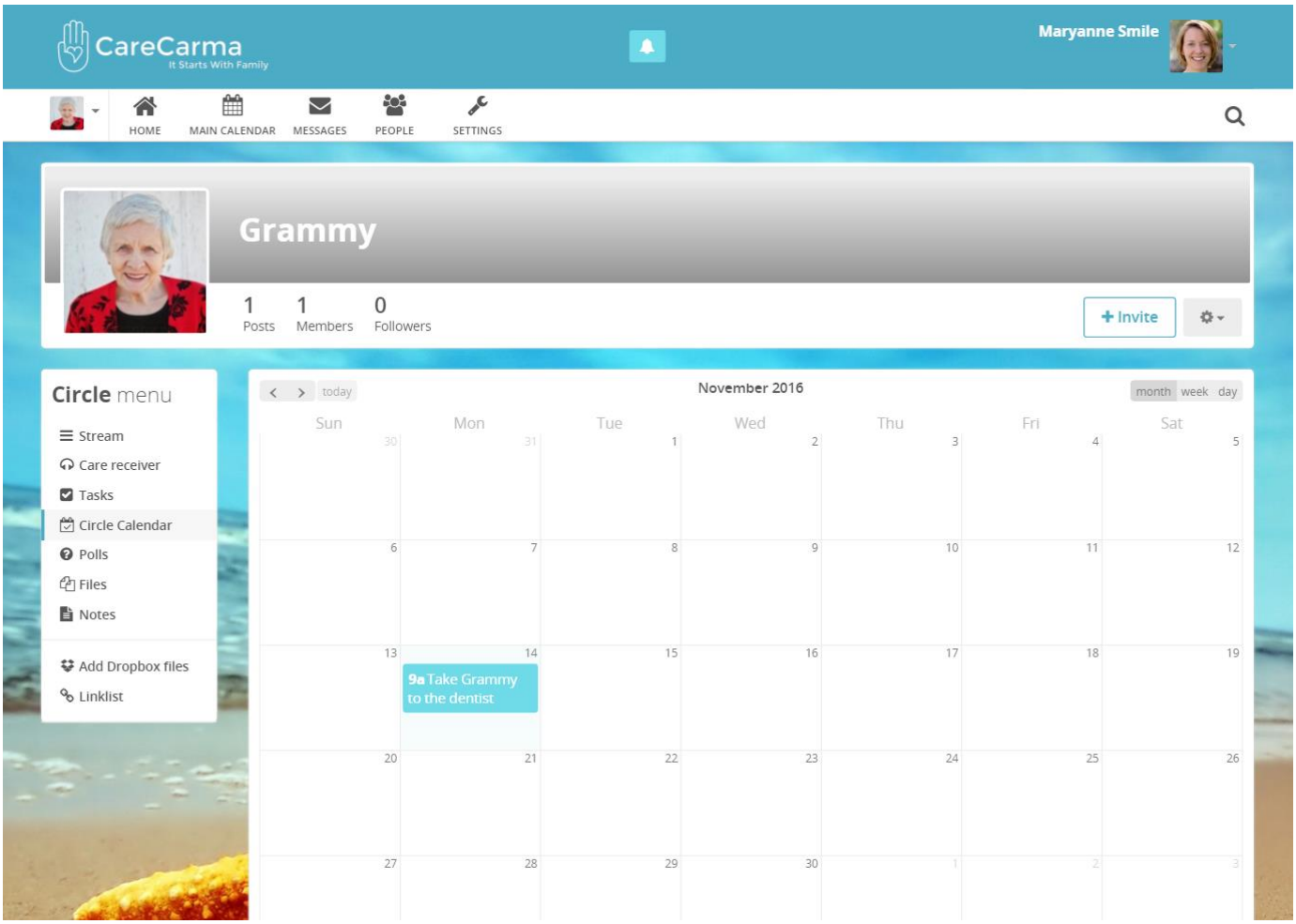
**CareCarma CareCircle**

This is the private section. Only people that have been invited to the Circle have access to it.
You can setup an unlimited number of CareCircles and they can been defined any way you prefer. They can be people, events, groups - anything.



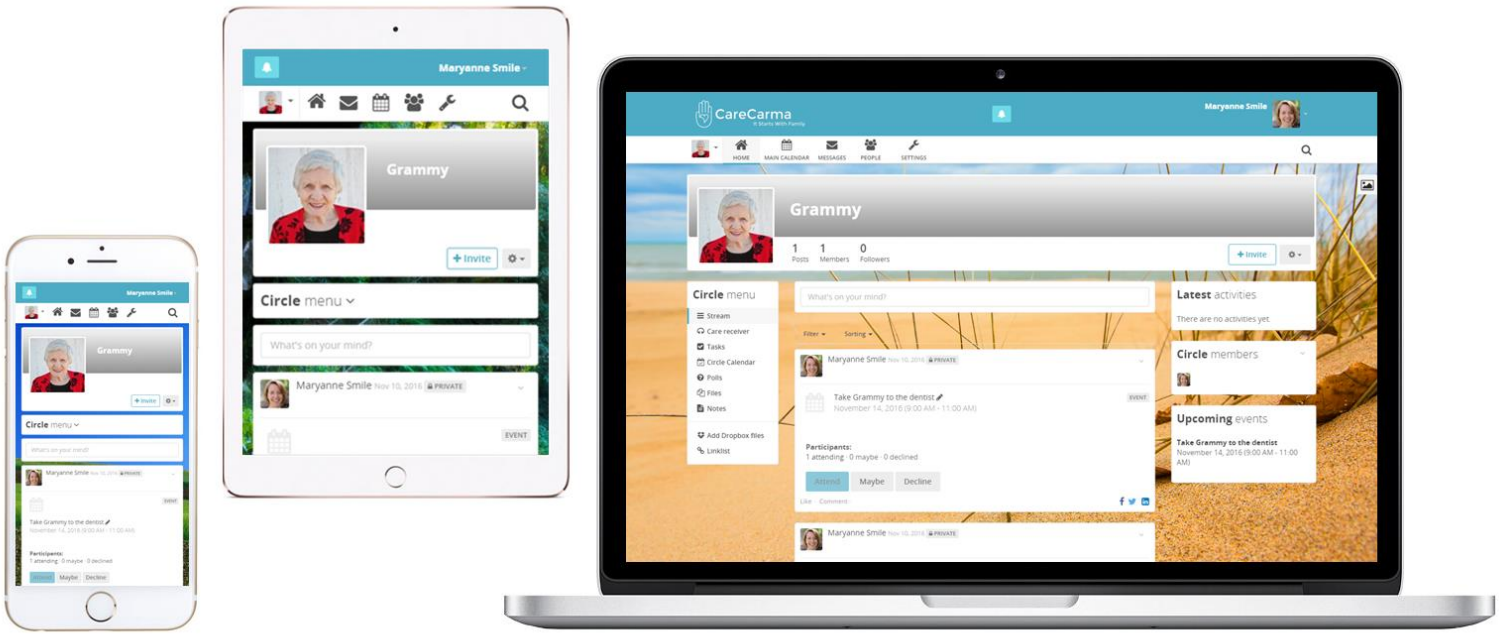

**CareCarma CareCircle Tools**

Once you've created a circle, you have access to a large array of tools and functions. Create and assign tasks, schedule events, upload and manage files and images and setup access to a smart mobile device such as an LG Urbane 2 Watch.



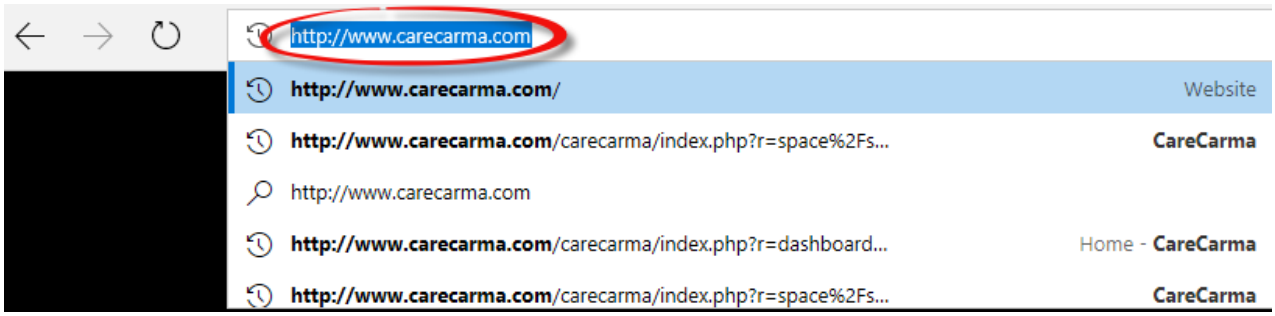

**Work on different platforms**

CareCarma is compatible with most browsers, so it will work on Windows, Apple and Linux PCs. A mobile version of CareCarma is available for both Android and iOS devices.

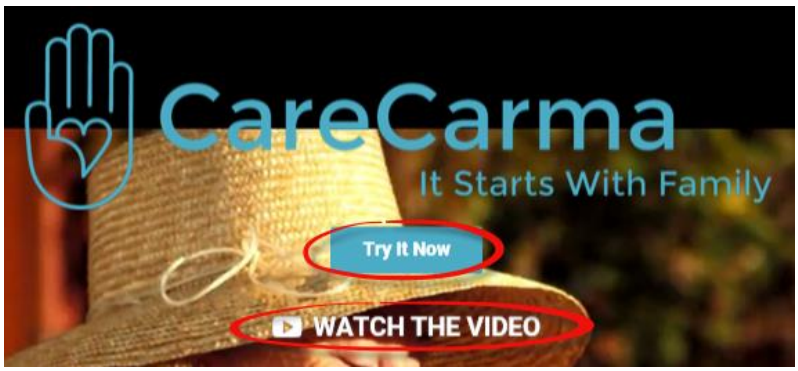


# GETTING STARTED

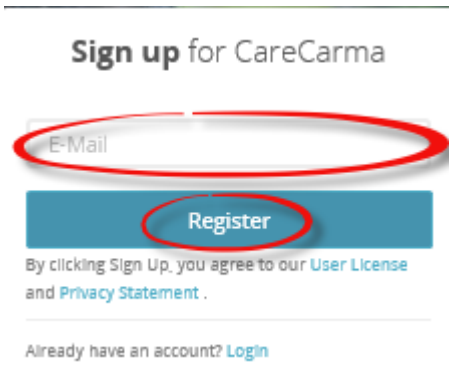
Open an Internet browser



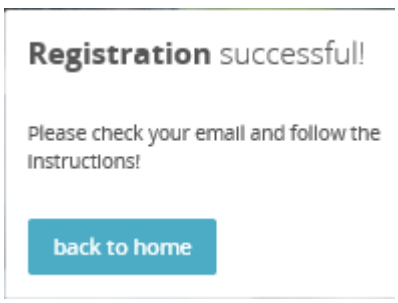

Enter the URL website address **(carecarma.com)** or **(http://carecarma.com)**




Optional: Select (watch the video) to learn more about CareCarma
Select (Try It Now) to access the (Sign up for CareCarma) pop-up

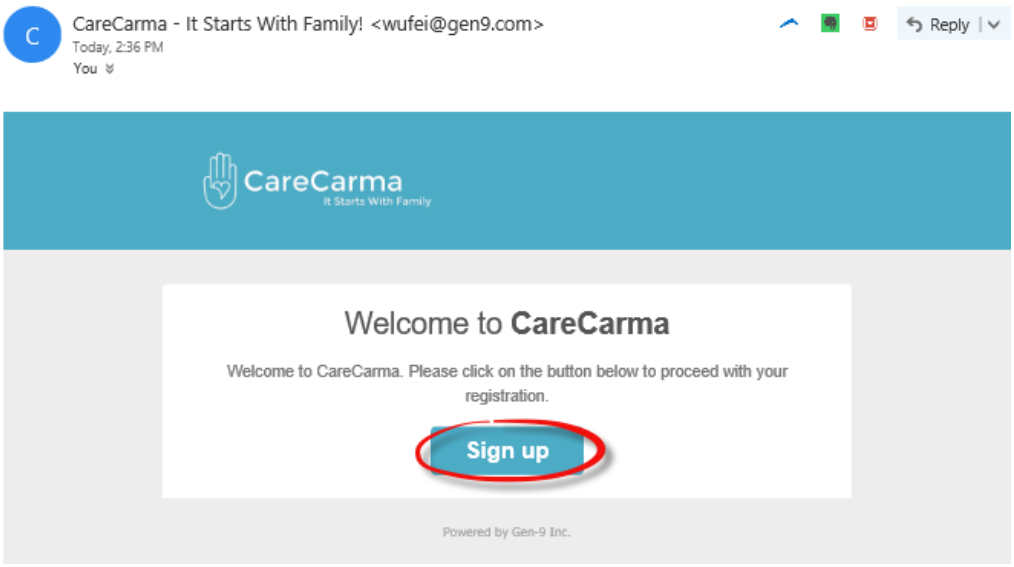



Enter an **(email address)**
Select **(Register)**

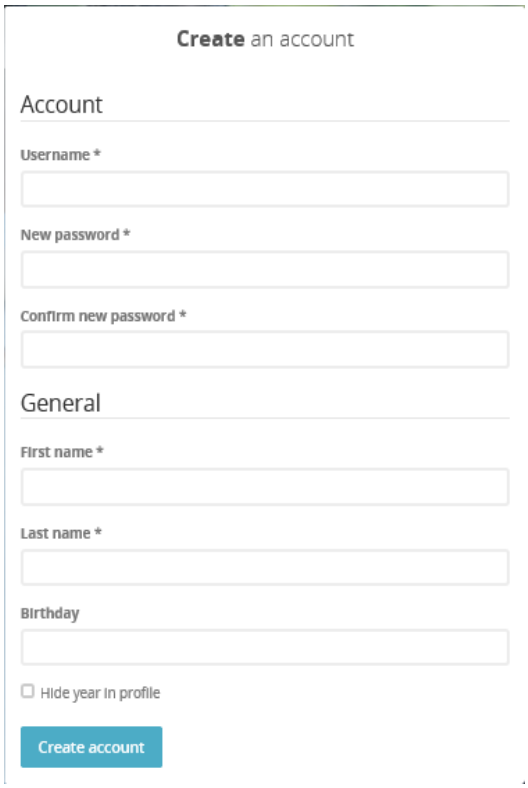



You will automatically receive a (Registration successful) pop-up

Registration Link



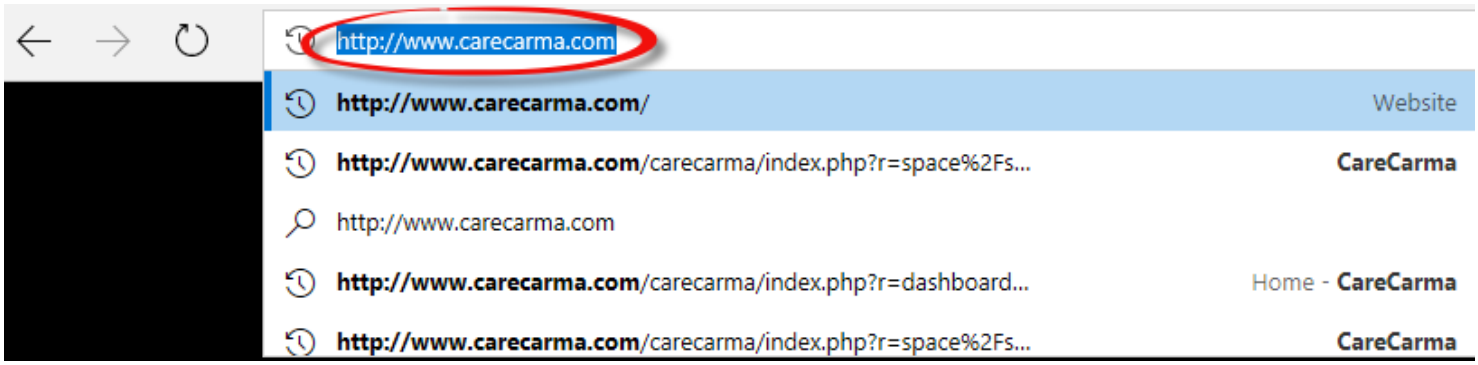

Open an Internet browser and access the account for the email you registered with CareCarma
Open the (CareCarma – It Starts With Family!) email
Select (Sign up) to access the (Create an account) pop-up



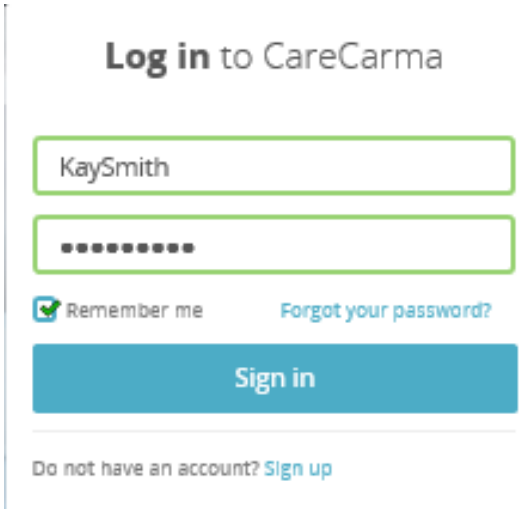

In the **(Username)** section, enter a name or email address (Username should contain at least 4 characters)
Note: This name is only used to log-in to CareCarma
In the **(New password)** section, enter a password for this account (Password should contain at least 8 characters)
In the **(Confirm new password)** section, re-enter the same password again
Note: The first and last name are the names that appear to CareCarma members or your CareCircle's members
In the **(First name)** section, enter your first name
In the **(Last name)** section, enter your last name
Optional: In the **(Birthday)** section, enter your birthday in the format mm/dd/yyyy
Optional: **(Check)** the **(Hide year in profile)** if you don't want your CareCircle members to see your year of birth
Optional: **(Uncheck)** the **(Hide year in profile)** if you do want your CareCircle members to see your year of birth
Select **(Create Account)**

# LOG IN TO YOUR CARECARMA ACCOUNT

Open an Internet browser



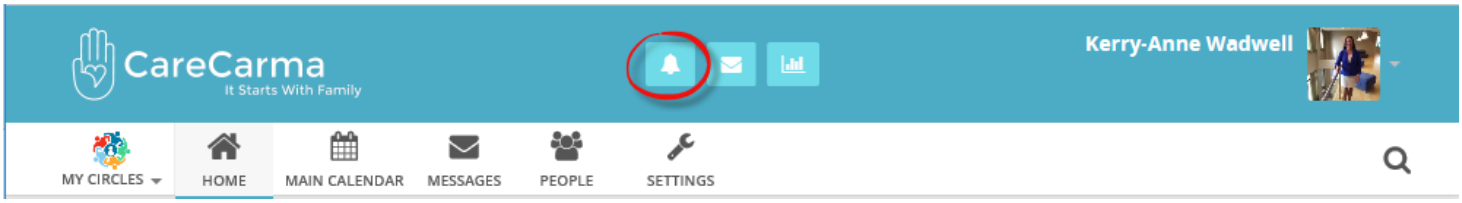

Enter the URL website address **(carecarma.com)** or **(http://carecarma.com)** to access the (Log in to CareCarma) pop-up
Note: You may want to save this URL website address as a favorite for easy access in the future




Enter the **(Username or Email)** you registered with CareCarma when you first signed up for this account
Enter the **(Password)** you registered with CareCarma when you first signed up for this account
Check the **(Remember me)** box if you want CareCarma to remember your username for future log-ins
Uncheck the **(Remember me)** box if you don't want CareCarma to remember your username for future log-ins
Select **(Sign in)**
If you forget your password, select (Forgot your password?) and follow the instructions
If you don't have an account or want to setup a new account, select (Do not have an account? Sign up) and follow the instructions

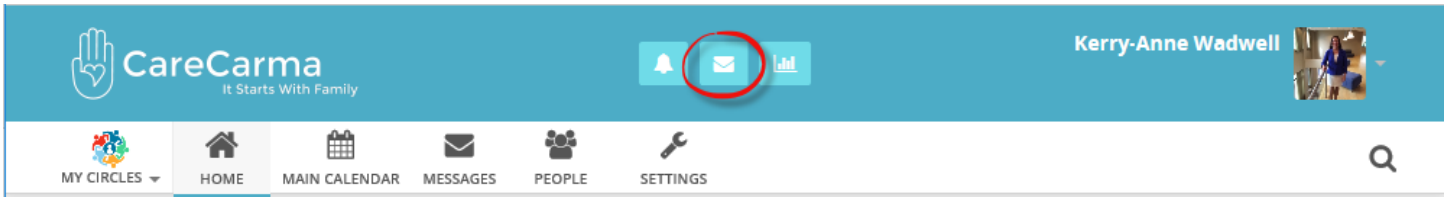
# CARECARMA FUNCTIONS AND TOOLS

CareCarma Toolbar – Notifications




Select the **(Notifications)** icon to access a list of notifications
When a new notification is received, a **(number)** is displayed above the **(Notifications)** icon
To access notifications, select the **(Notifications)** icon
To close notifications, select the **(Notifications)** icon a second time

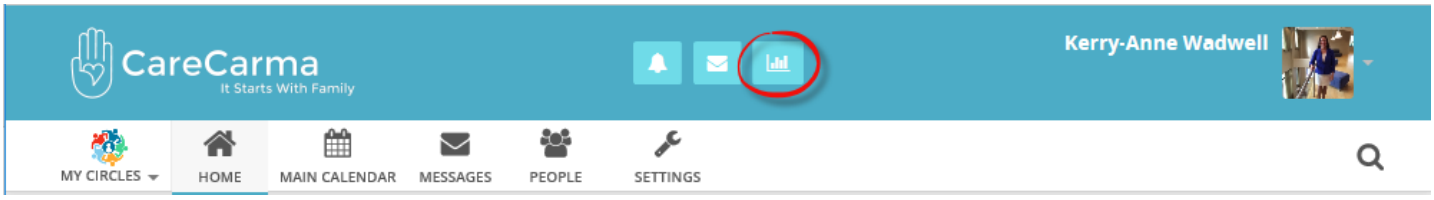
CareCarma Toolbar – Messages




Select the **(Messages)** icon to access a list of messages
When a new message is received, a **(number)** is displayed above the **(Messages)** icon
To access messages, select the (**Messages)** icon
To close messages, select the **(Messages)** icon a second time
To create a new message

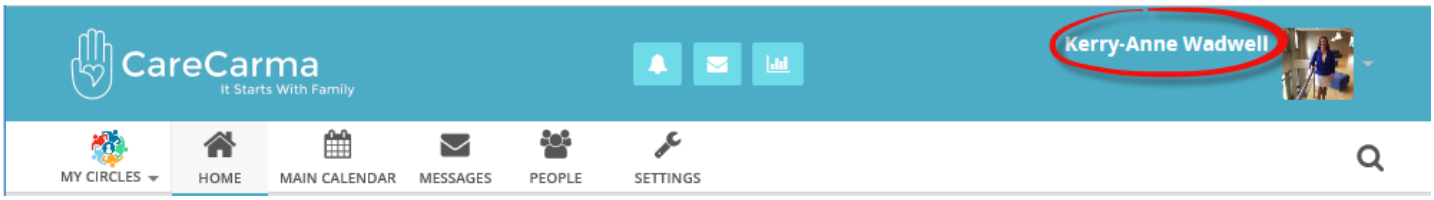
- Select **(New Message)**
- In the (**Recipient)** section, enter one or more email addresses
- In the **(Subject)** section, enter a subject description
- In the **(Message)** section, enter your message
- Optional: Use the tools on the toolbar to edit the message
- When your message is complete, select **(Send)**
- If you don't want to send the message, select **(Close)**

CareCarma Toolbar – Reports List



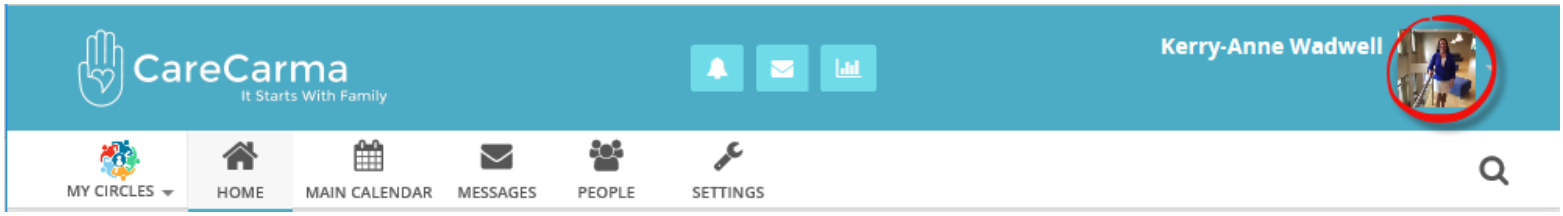

Select the **Reports List** to access the Care Receivers health report(s)

CareCarma Toolbar – Name



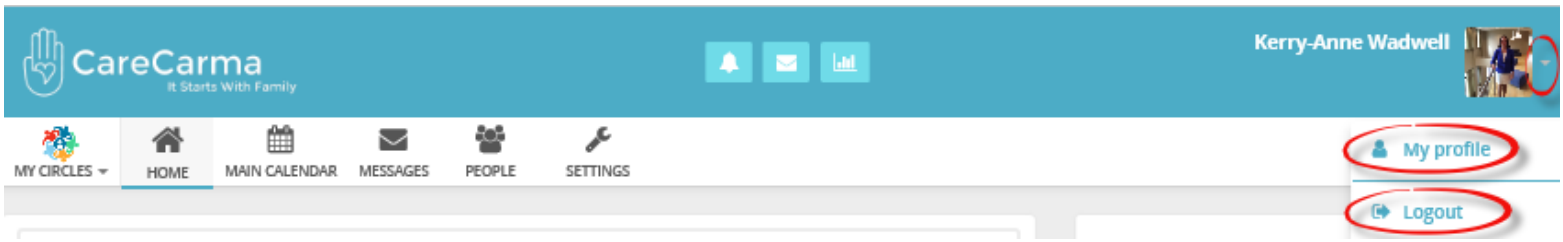
This is the name of the CareCarma member

CareCarma Toolbar – Picture



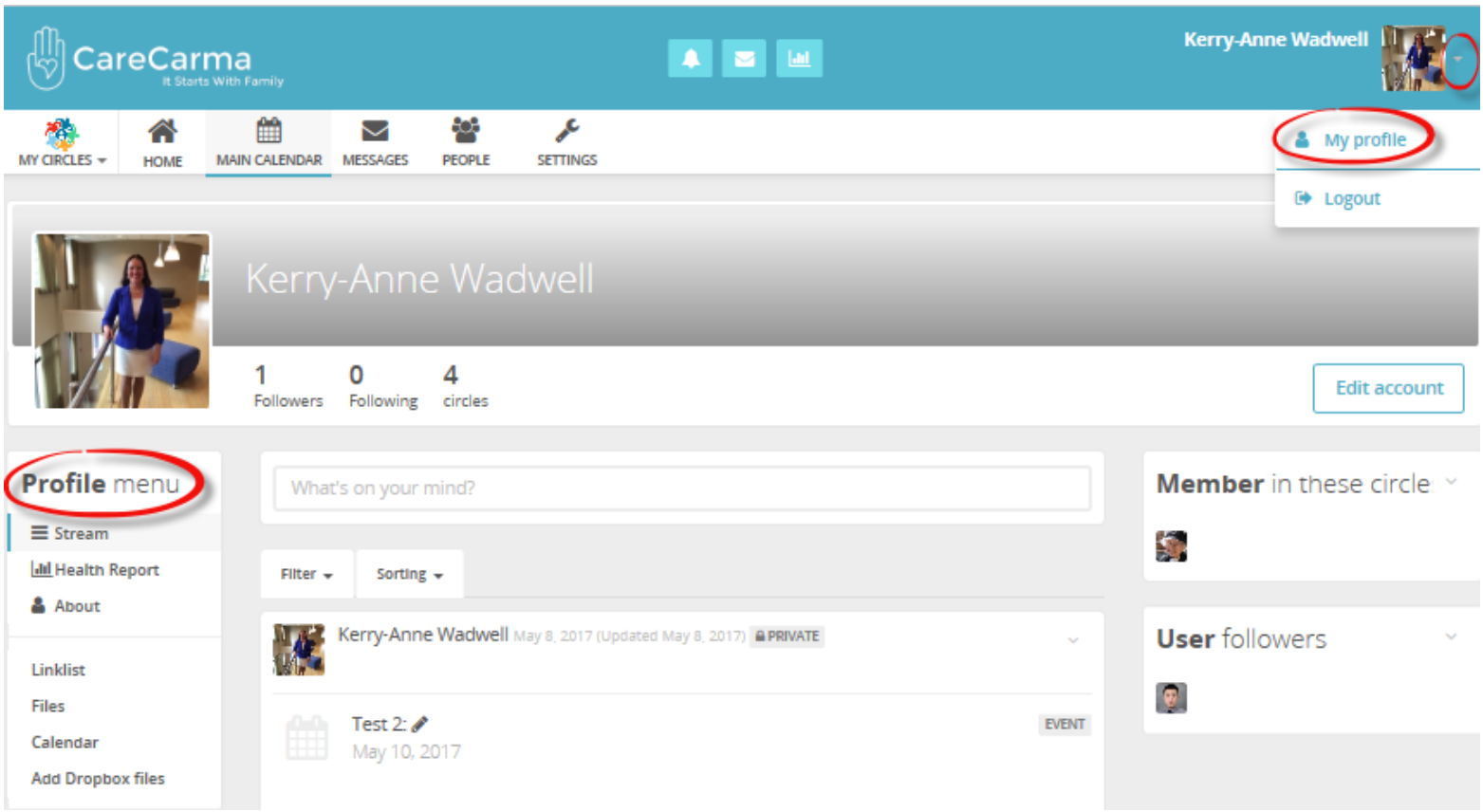

This is a picture of the CareCarma member

CareCarma Toolbar – Drop Down Arrow



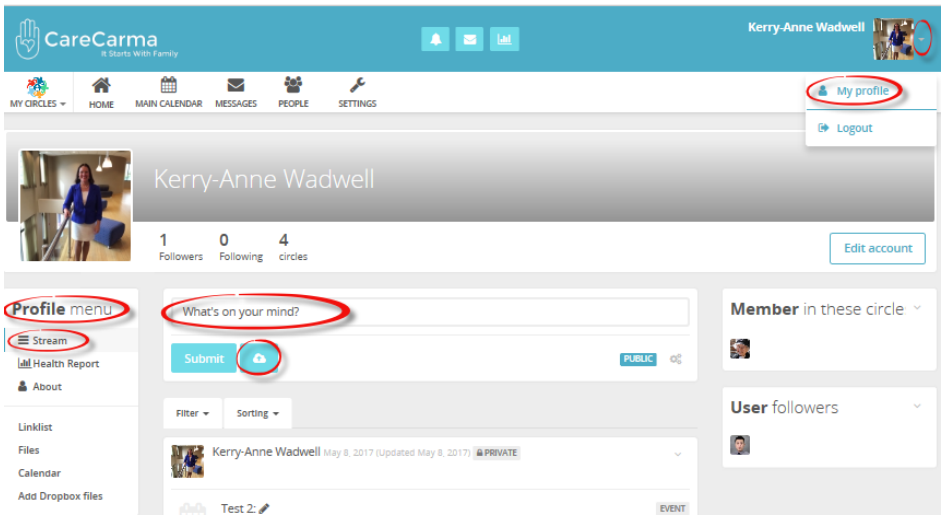

Select the **(down-arrow)** adjacent the picture to access (My Profile) or to (Logout)

CareCarma Toolbar – Drop Down Arrow – My Profile




Select the **(My profile)** to access the (Profile menu)

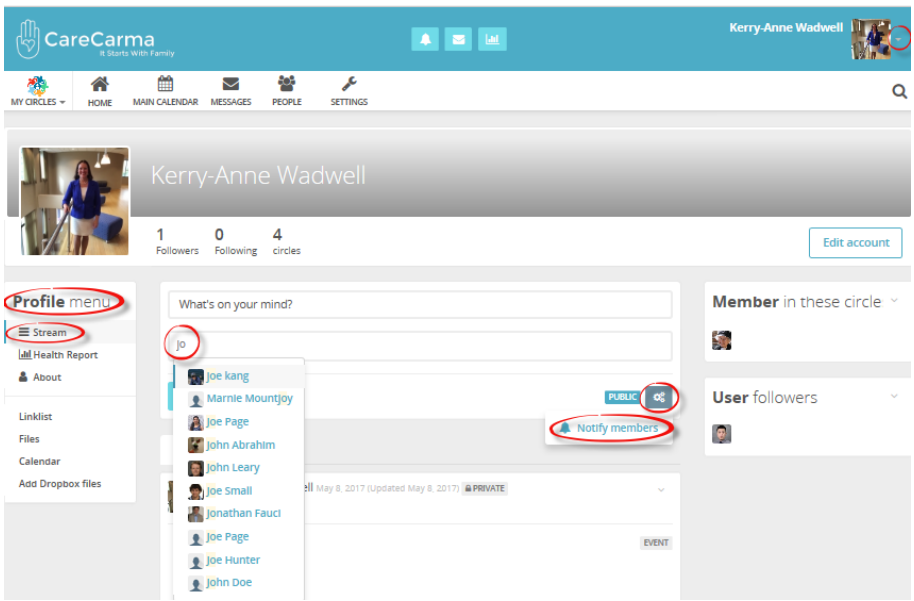
CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Stream




Selecting **(Stream)** in the Profile Menu allows you to view messages and post messages and files:
1. Privately to CareCircle members only
2. Publicly to all CareCarma members

To post a message:
Select the (What's on your mind?) box then write your message

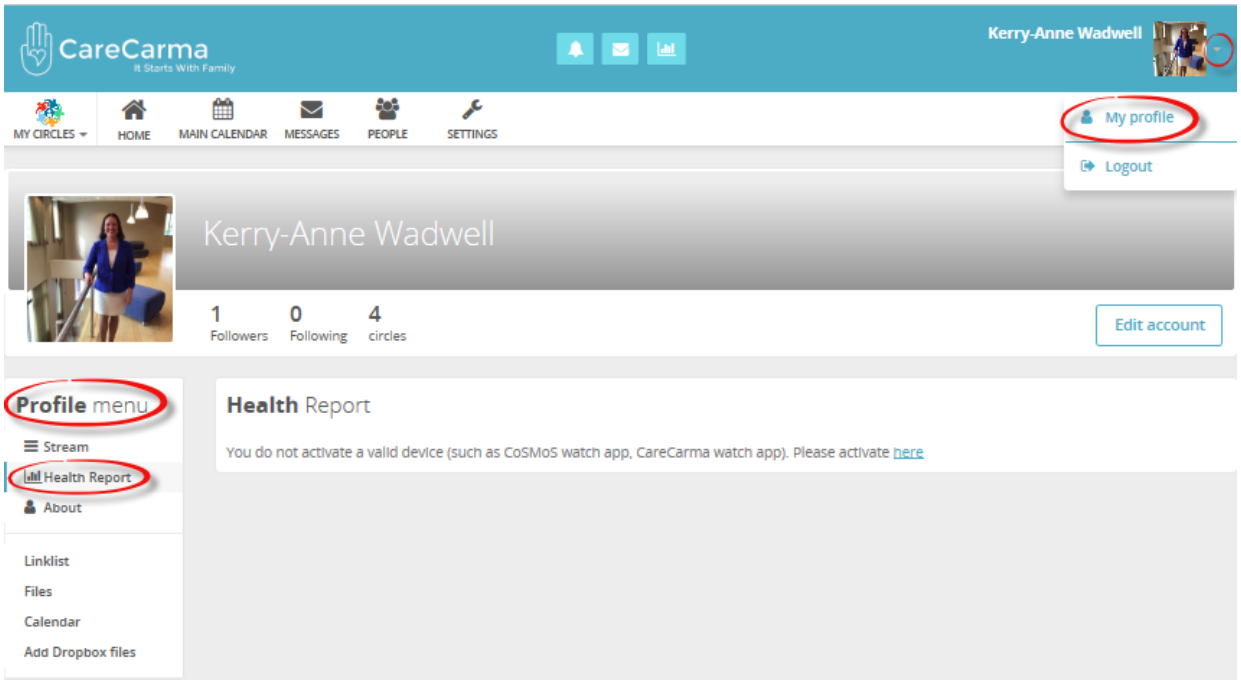
To add files to your message:
Select the **(upload image)** icon
Locate the file you want to attach
Select **(open)**




To **(Notify Members)** of a pending message:
If you want to send a notification to members letting them know there is a message pending
Select the **(Gear Icon)**
Select **(Notify Members)**
Start typing a member's name
Select the member from the drop-down menu
Repeat the last two steps until everyone you want to send the notification to is included

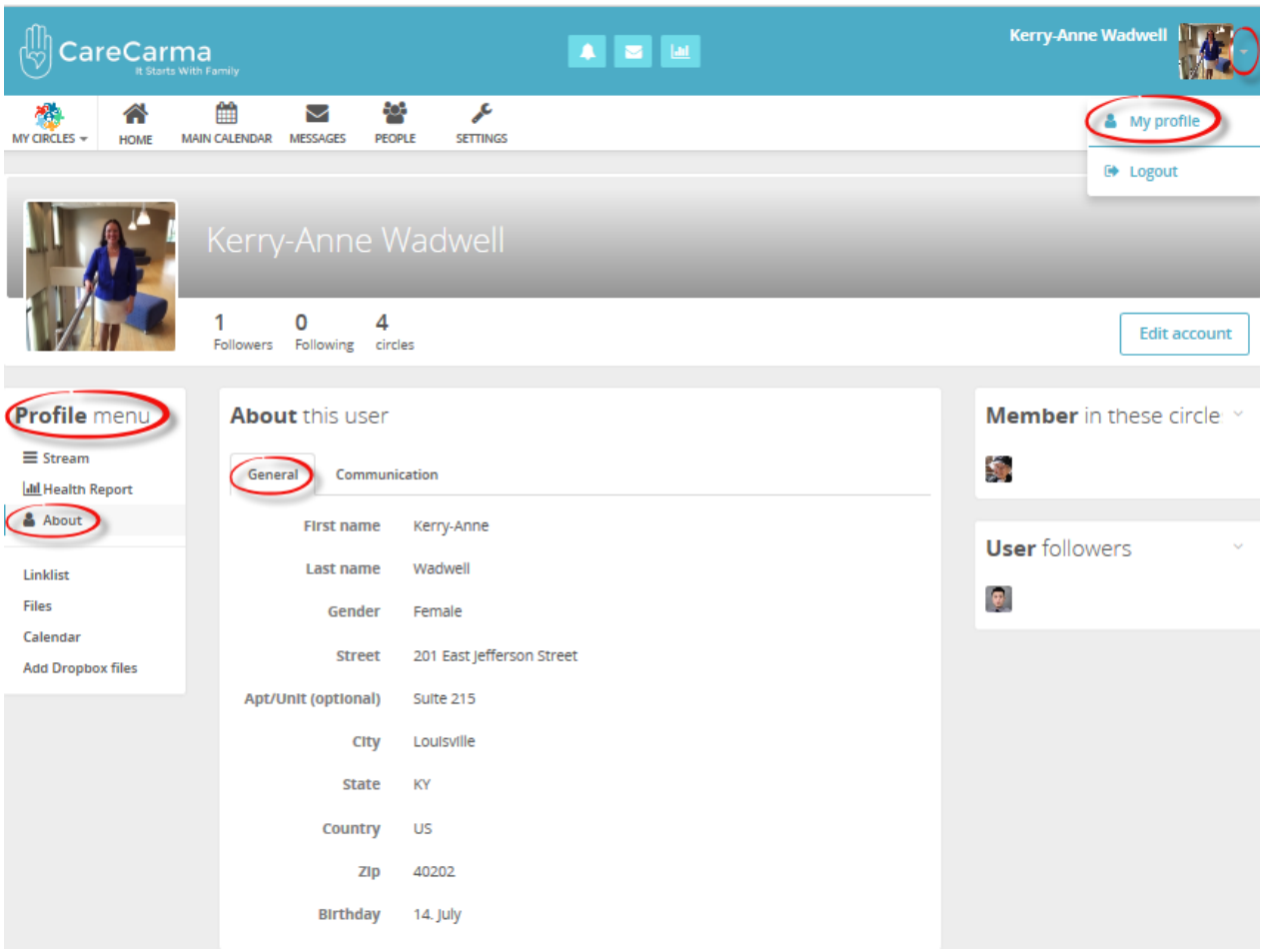
Select **(Submit)**, once the message is ready to send out

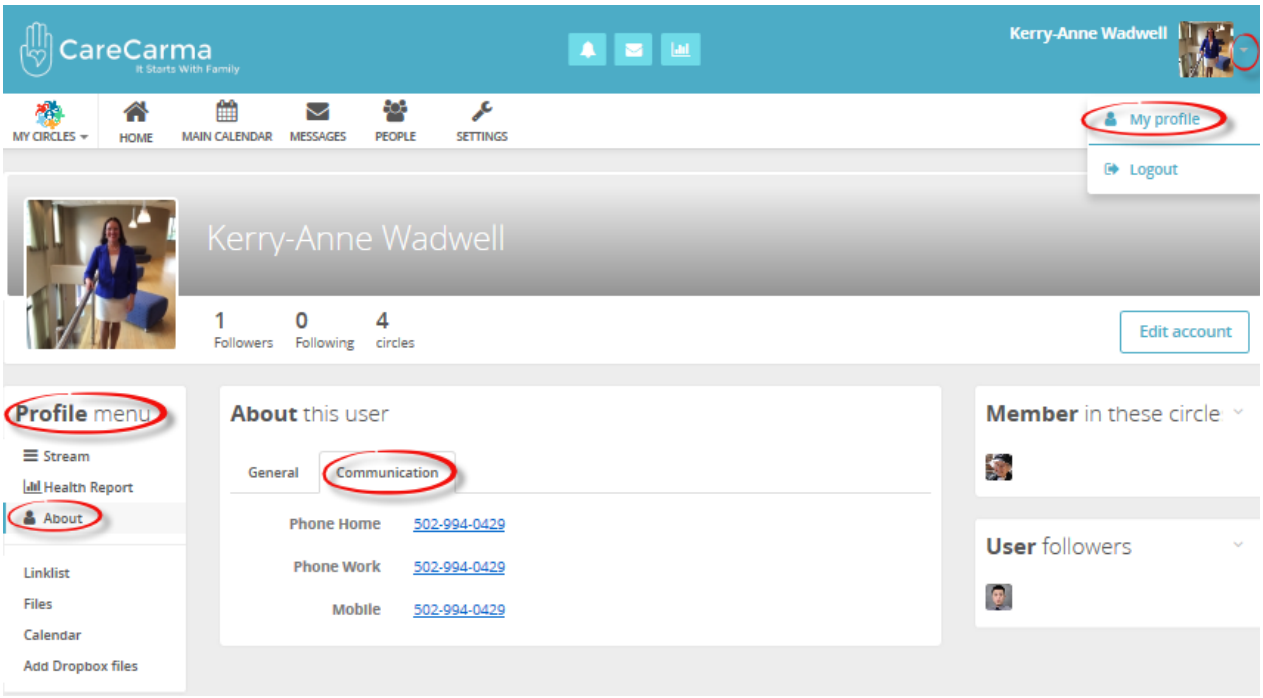
CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Health Reports



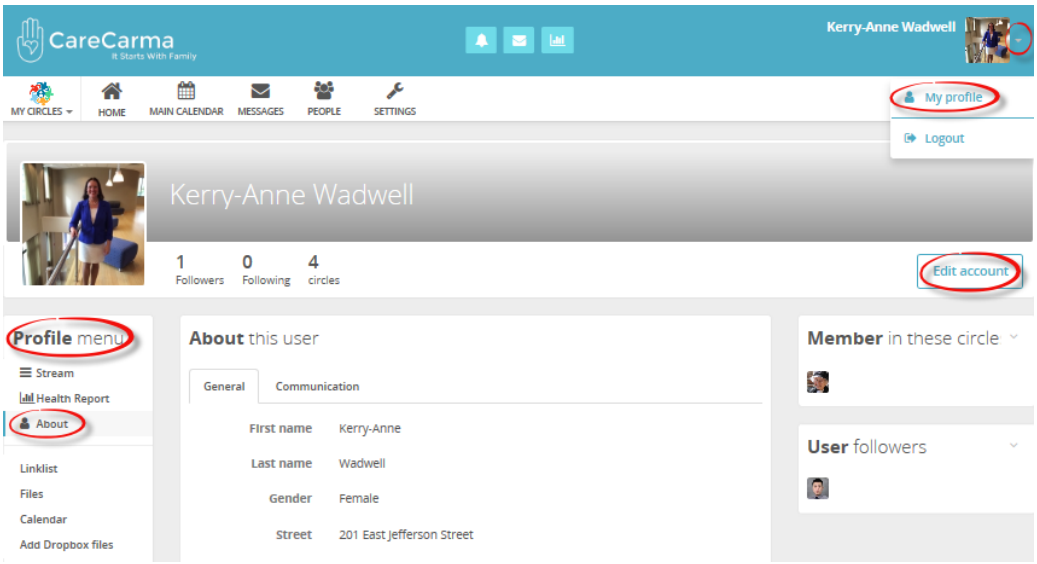

Select (**Health Reports)** in the Profile Menu to access the Care Receivers health report(s)

CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – About

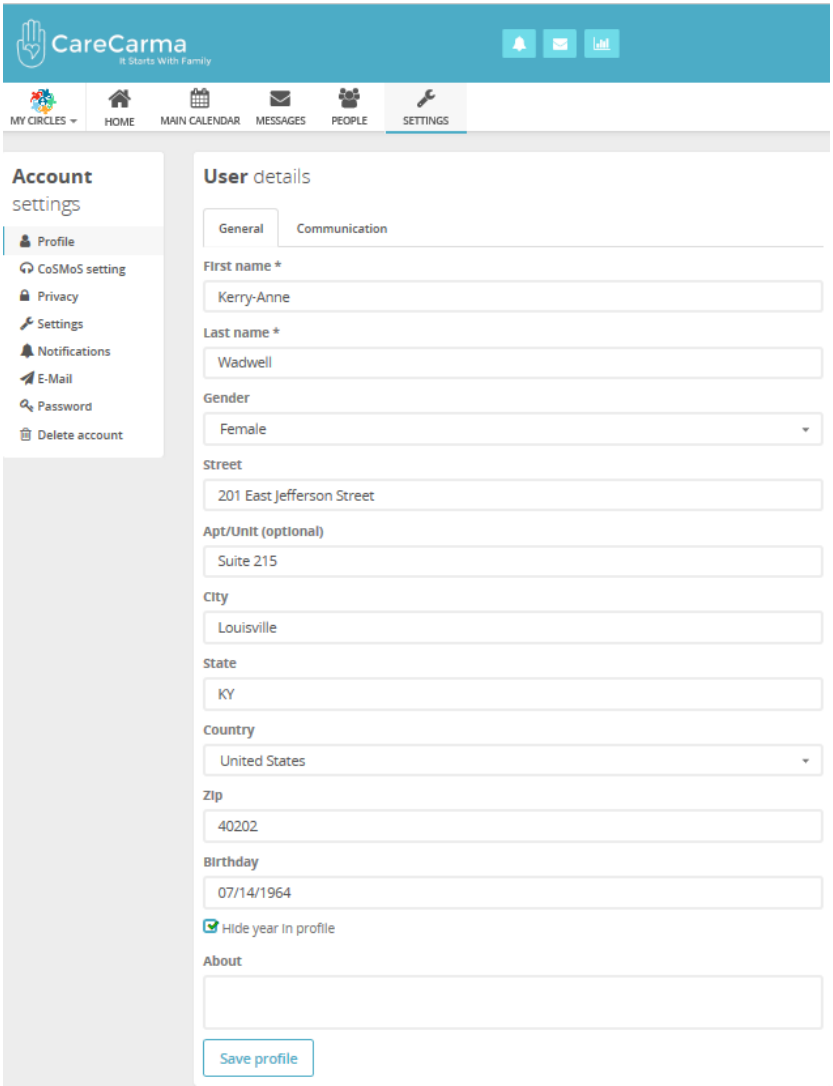




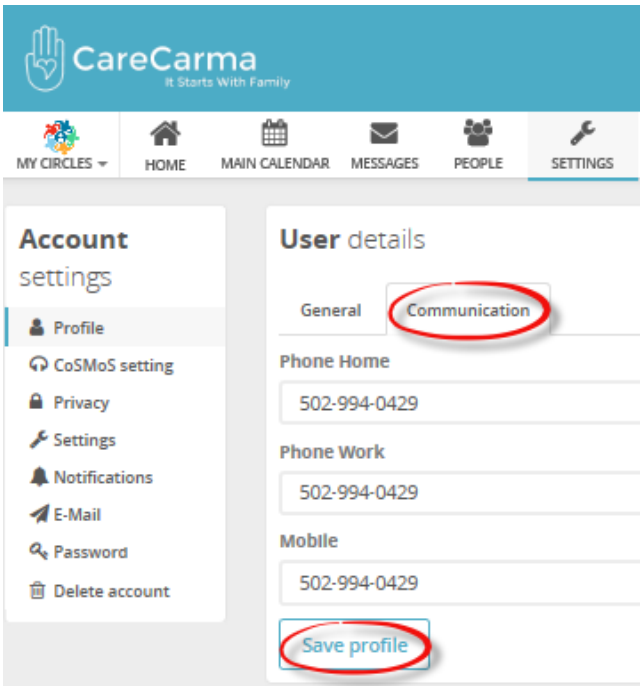

To view your profile information:
Select **(About)** in the Profile Menu
Select the **(General)** tab
Review the information
Select the **(Communication)** tab
Review the telephone numbers




To edit your profile information:
Select **(About)** in the Profile Menu
Select **(Edit account)** to automatically open the (General tab) of profile editor

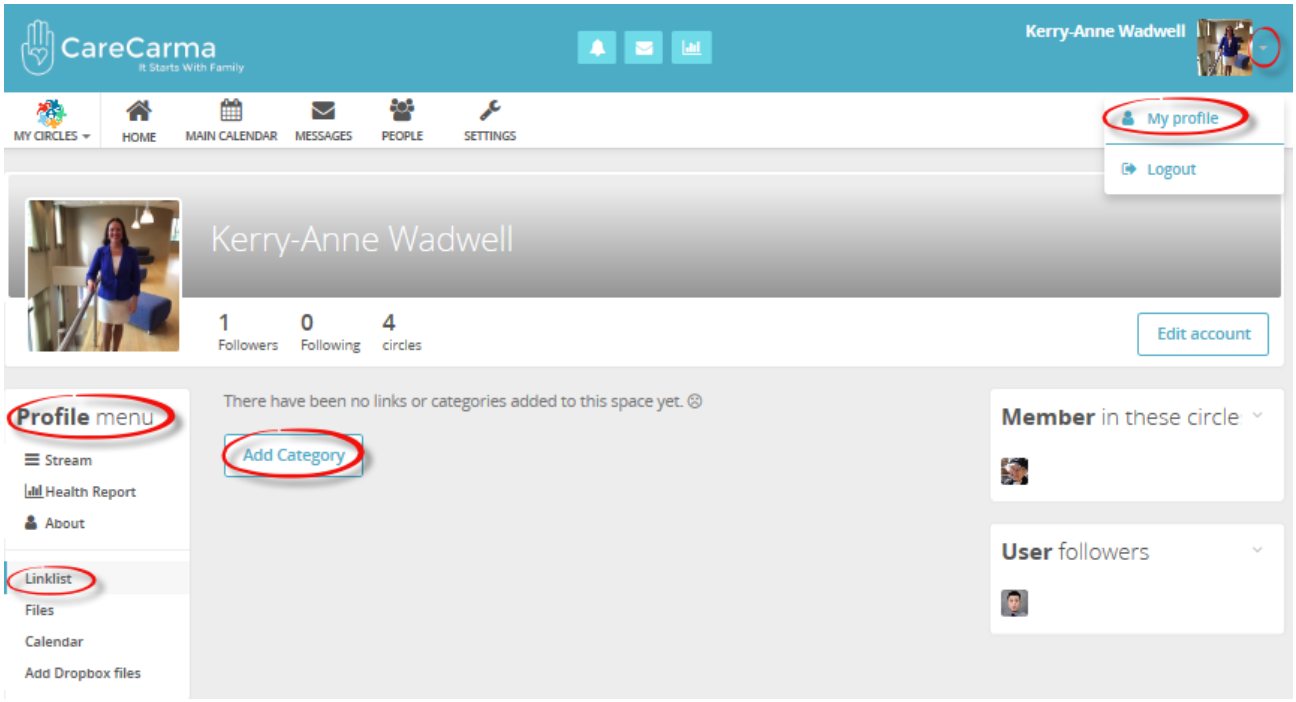



Edit the information in your profile



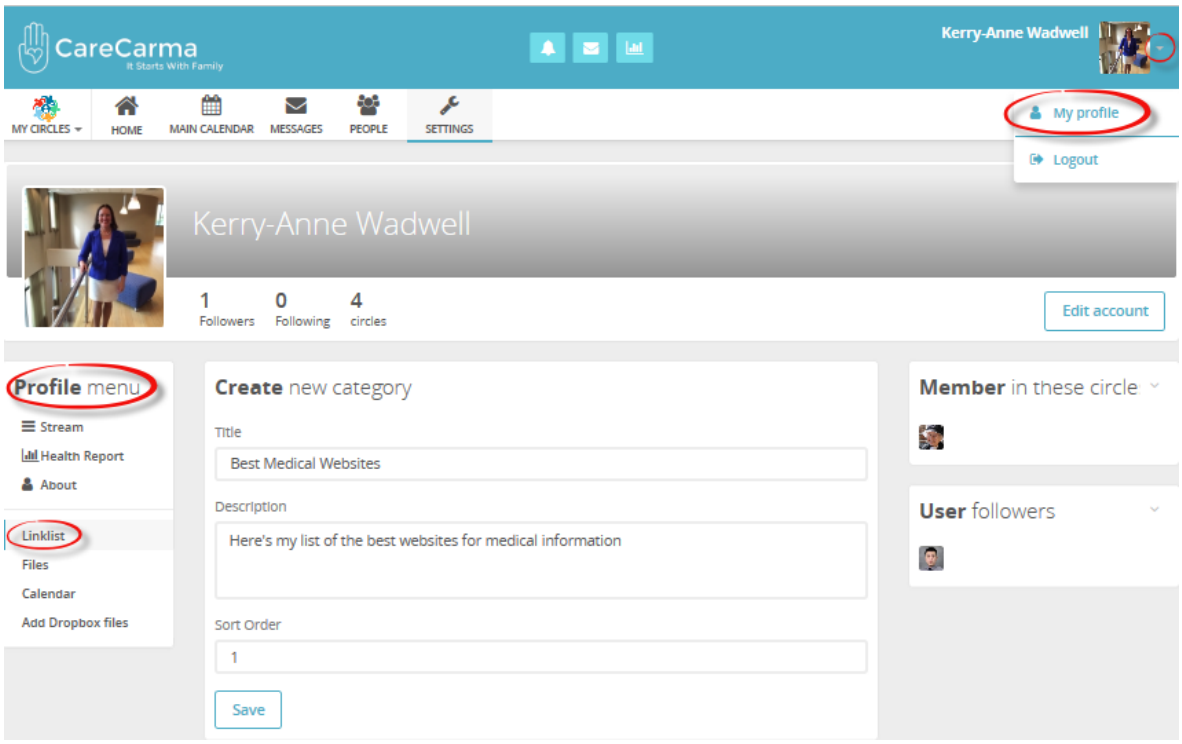

Select the **(Communication)** tab
Edit the phone numbers in your profile
Select **(Save Profile)**

CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Linklist

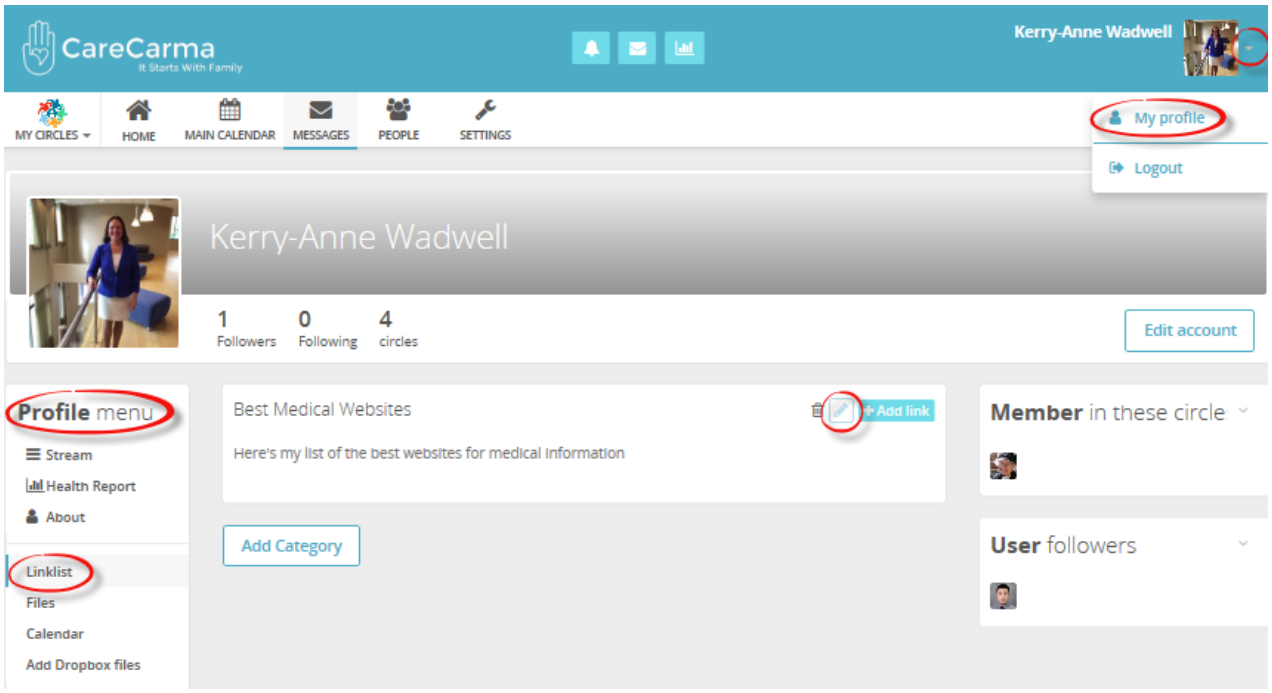



Selecting (Linklist) from the Profile Menu allows you to include links to articles that your CareCircle may find interesting
To add links to the Linklist you must first create a category

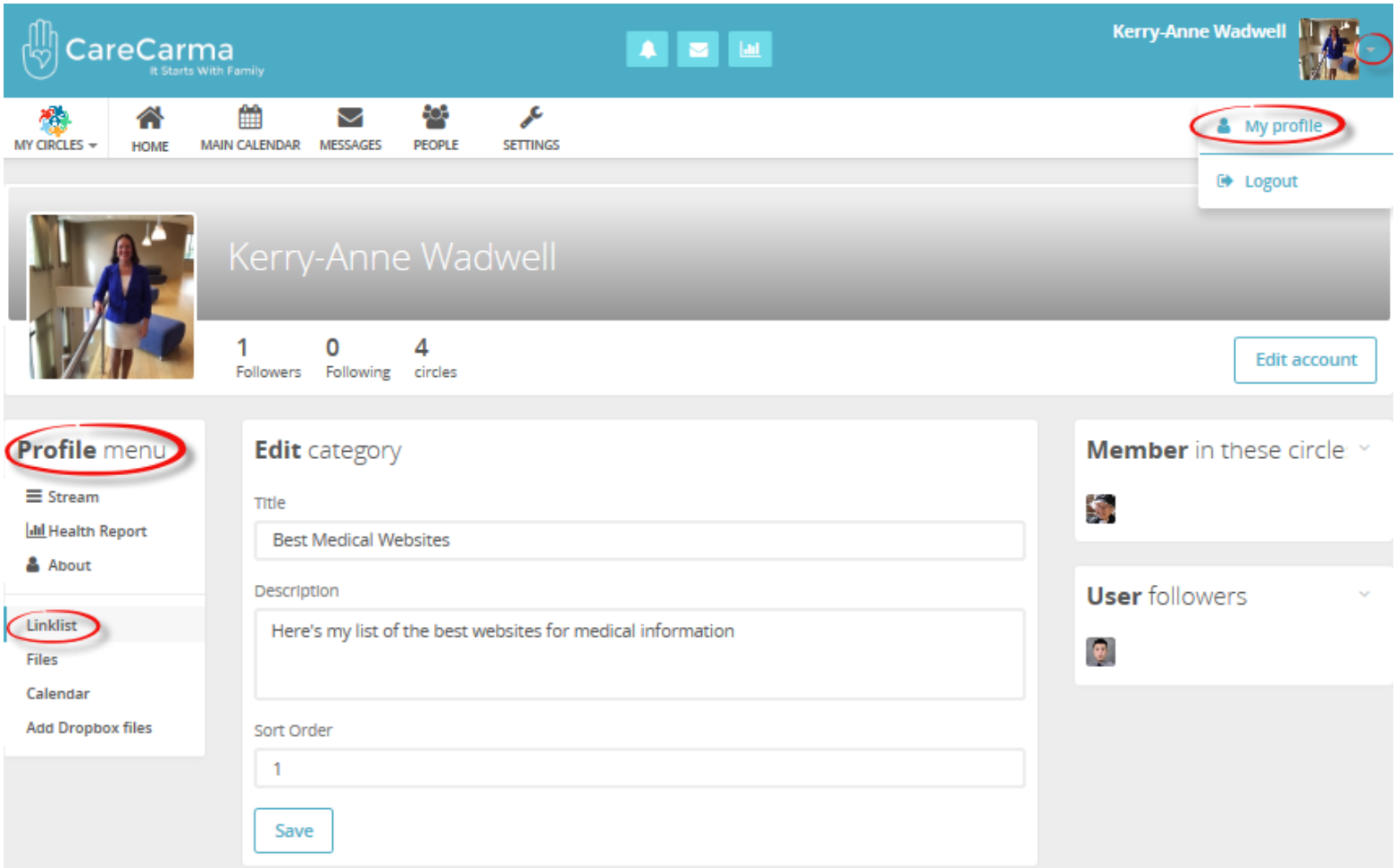
To add a category:
Select **(Add Category)** to access the (Create new category) pop-up



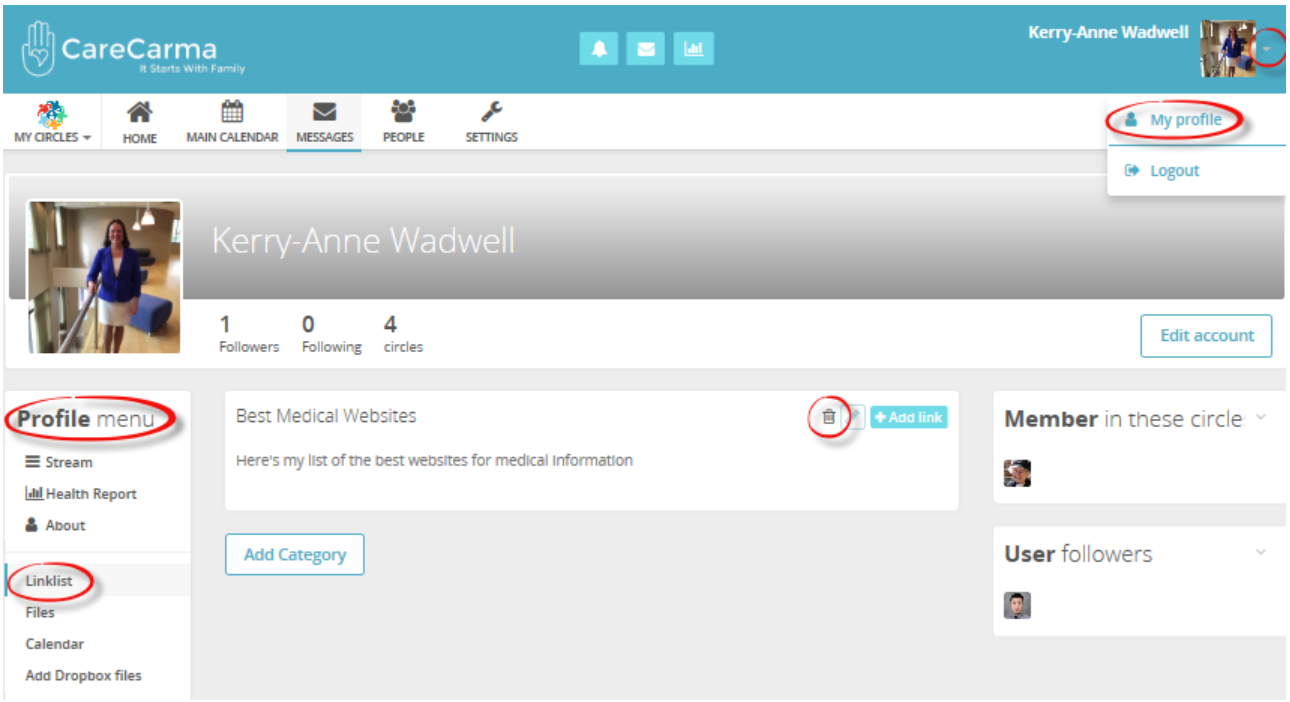

Enter a **(Title)** to name the category
Optional: Enter a (Description)
Optional: Enter a number to place the category in a particular order
Select **(Save)** to create the new category
Repeat these steps for each category you want to add
Select **(Linklist)** to not create the new category



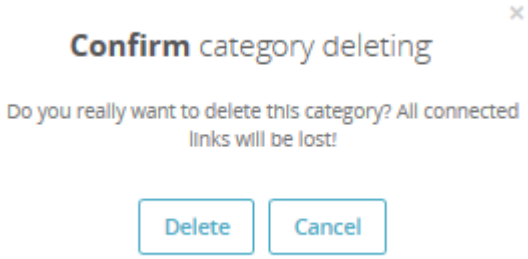

To Edit a category:
Select the ✎ (modify) icon adjacent the (category) you want to make changes to, to access the **(Edit category)** pop-up



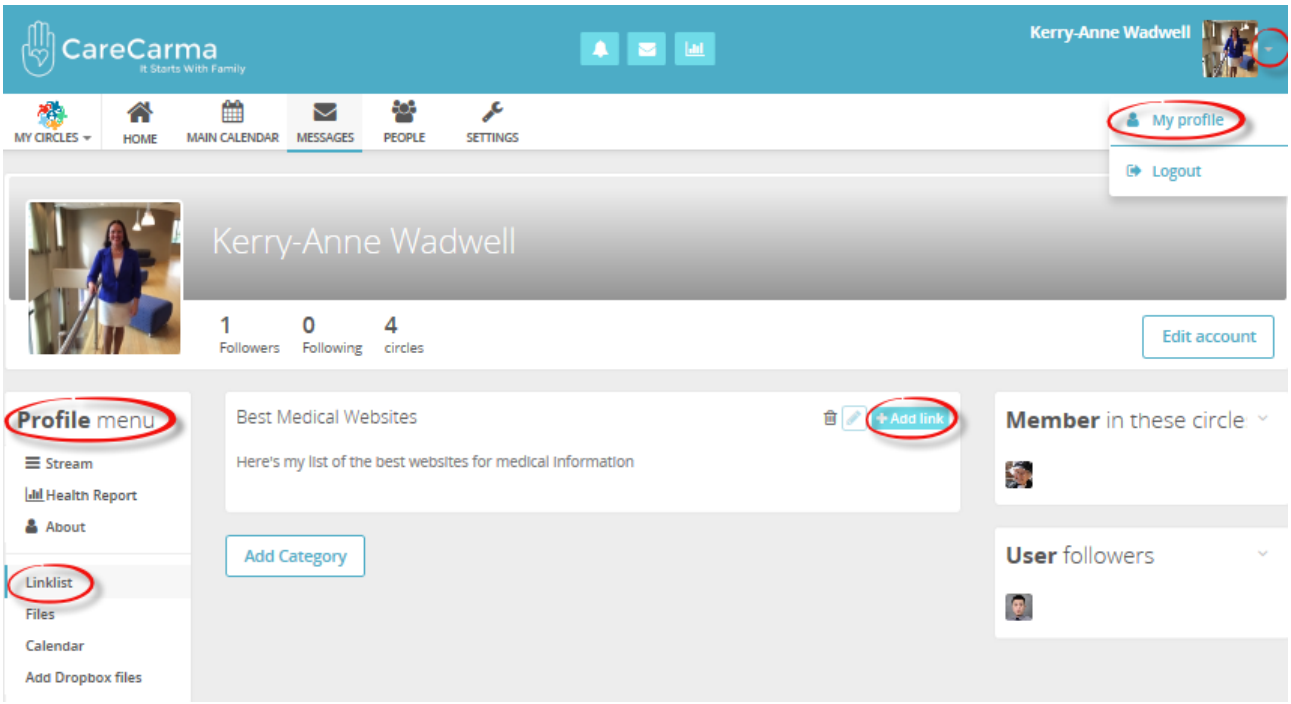

Make the appropriate changes to the (Title), (Description) or (Sort order)
Select **(Save)** to keep the changes
Select **(Linklist)** to disregard the changes



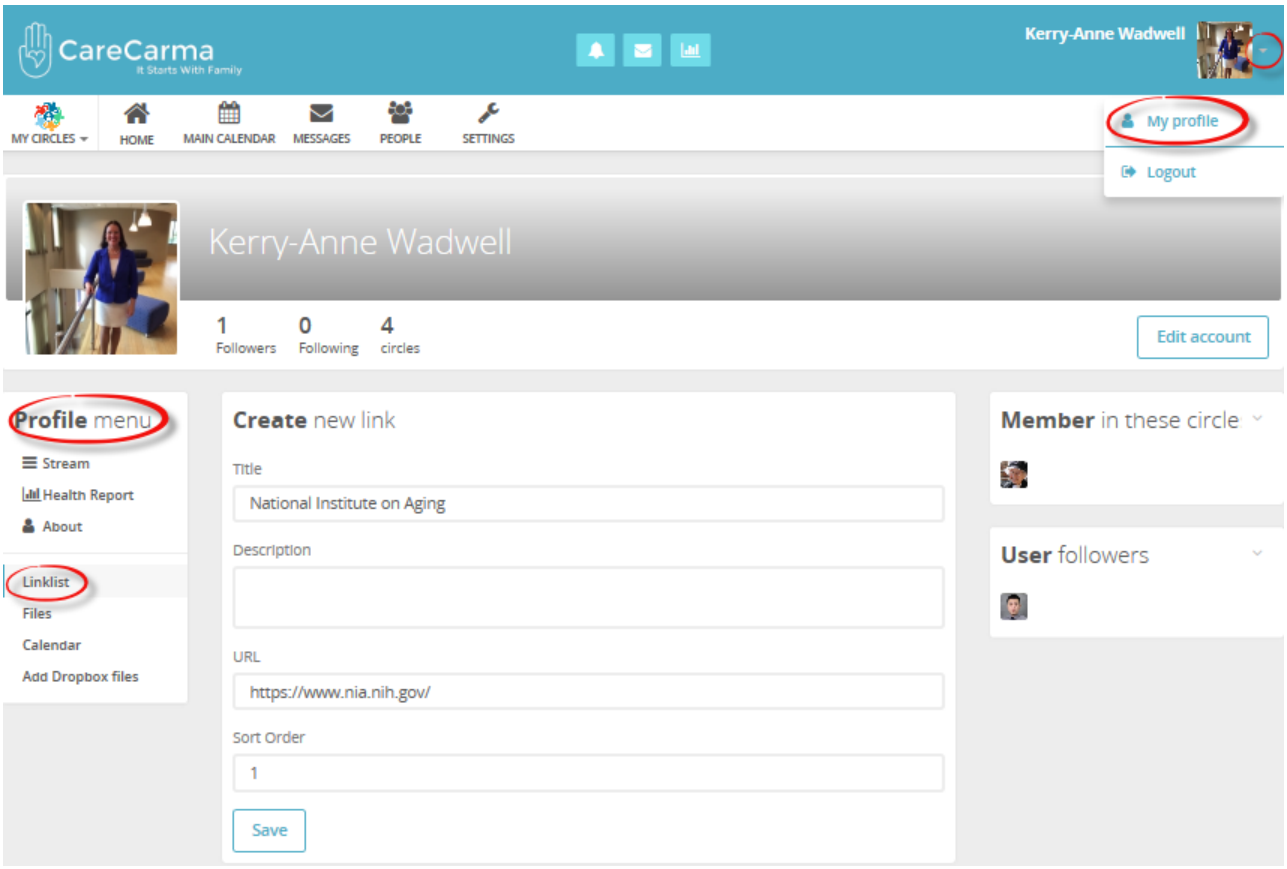

To Delete a category:
Select the 🗑 (delete) icon adjacent the (category) you want to delete to access the (Confirm category deleting) pop-up



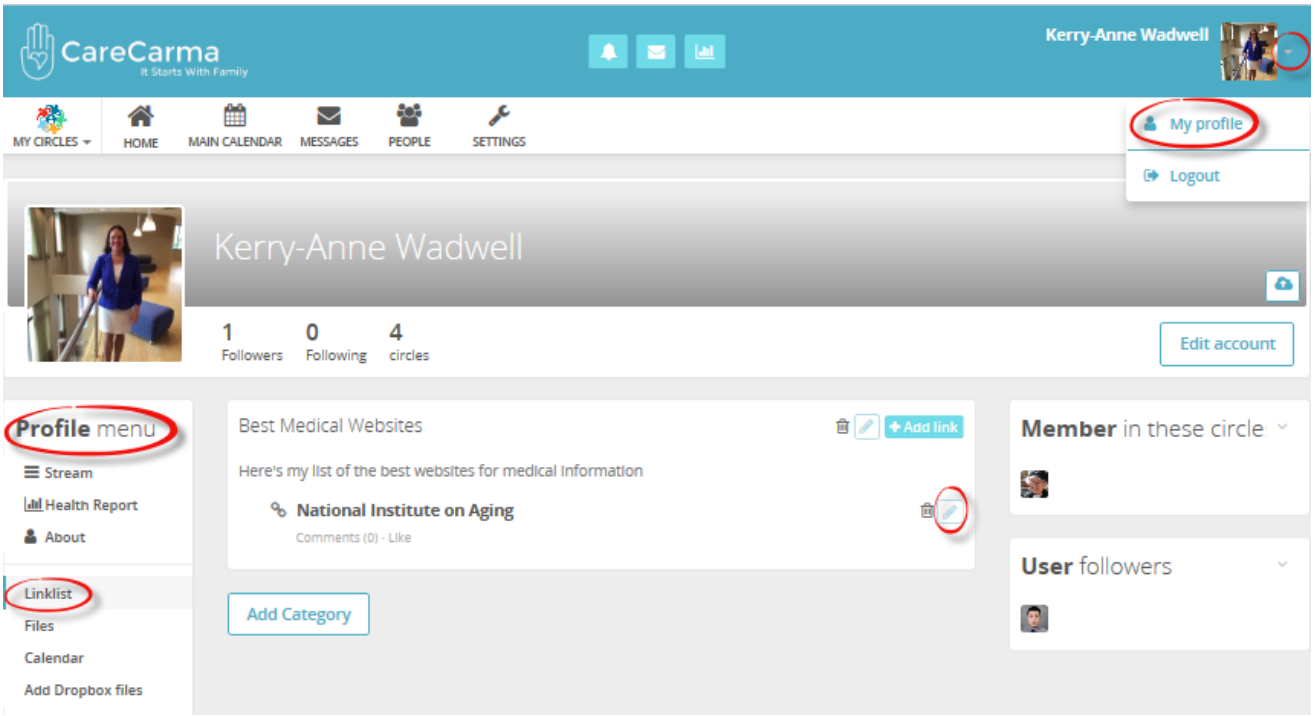

Select **(Delete)** to delete the category
Select **(Cancel)** to keep the category



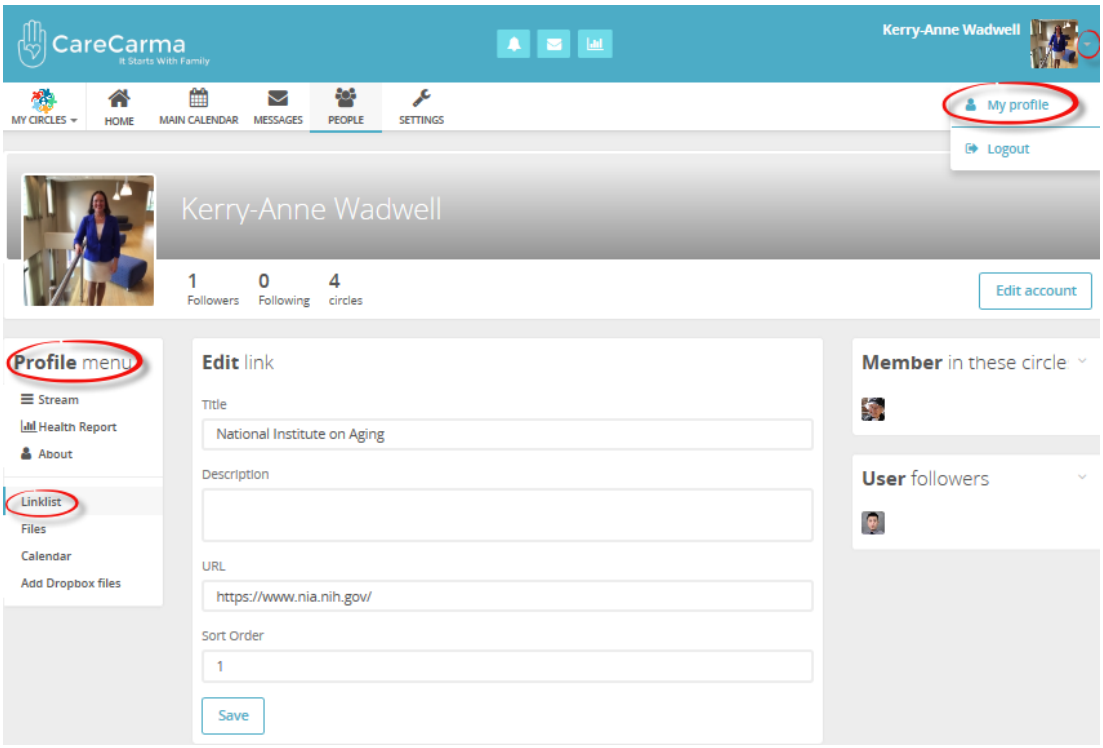

To add a link:
Select **(+ Add link)** to open the (Create new link) pop-up



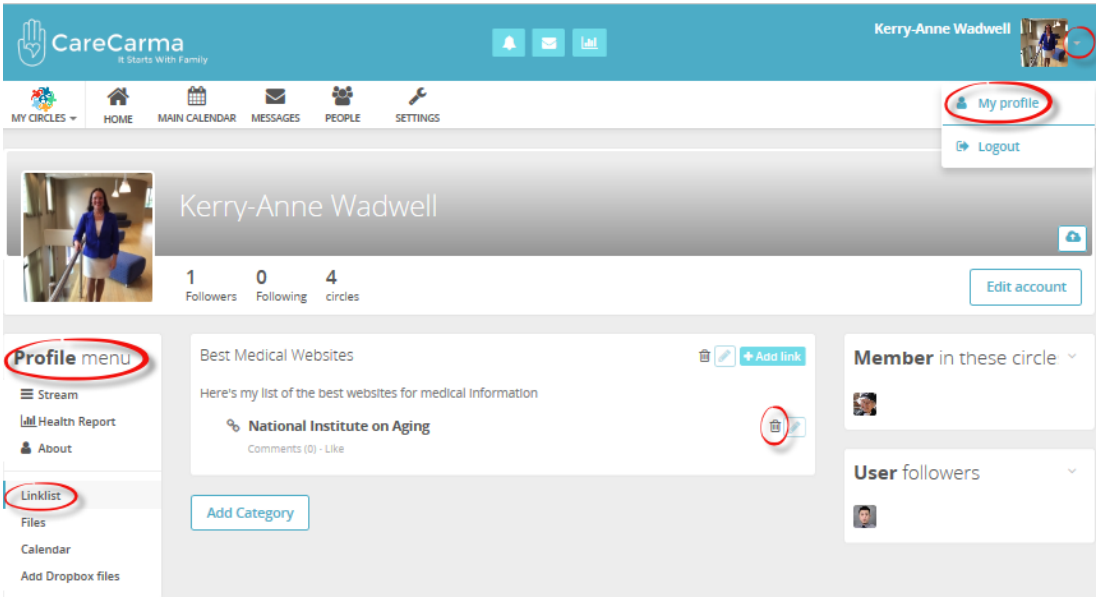

Enter a **(Title)** to name the link
Optional: Enter a (Description)
Enter the **(URL)** for the link
Optional: Enter a number to place the link in a particular order
Select **(Save)** to create the new link
Repeat these steps for each link you want to add
Select **(Linklist)** to not create the new link



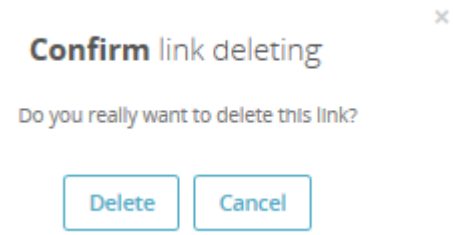

To Edit a link:
Select the (edit) icon adjacent the link you want to make changes to, to access the (Edit link) pop-up




Make the appropriate changes to the (Title), (Description), (URL) or (Sort order)
Select **(Save)** to keep the changes
Select **(Linklist)** to disregard the changes

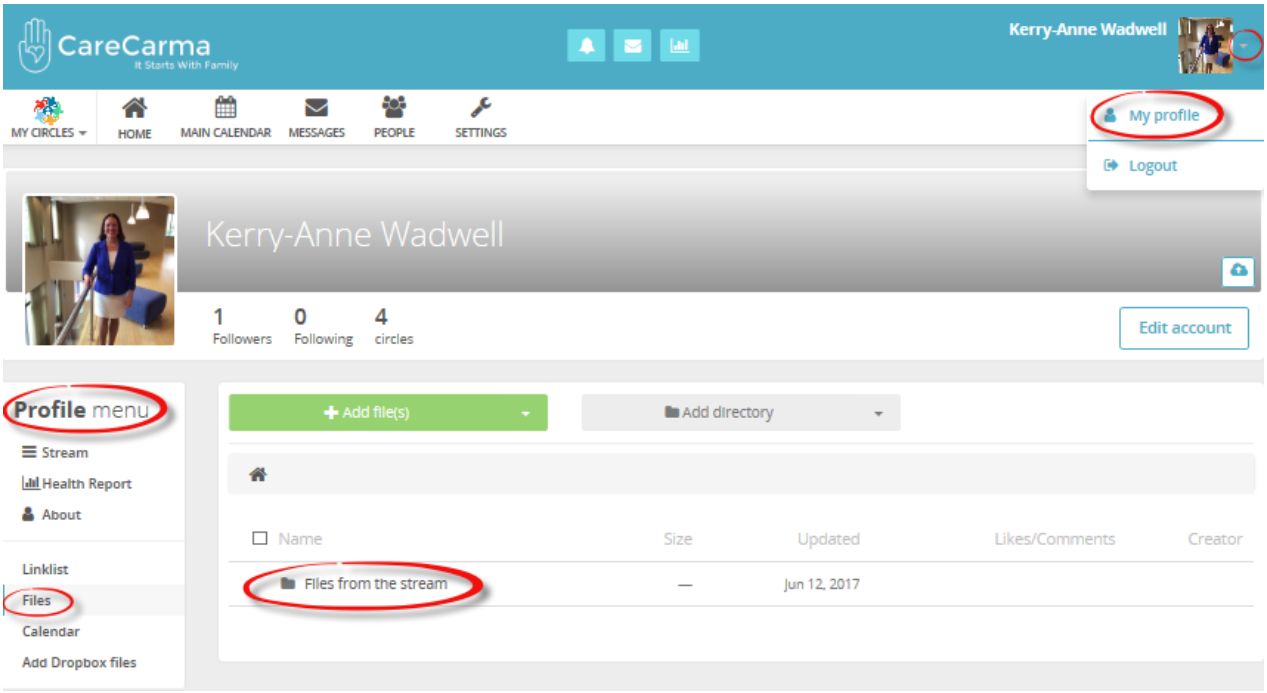



To Delete a link:
Select the 🗑 (delete) icon adjacent the link you want to delete to access the (Confirm link deleting) pop-up



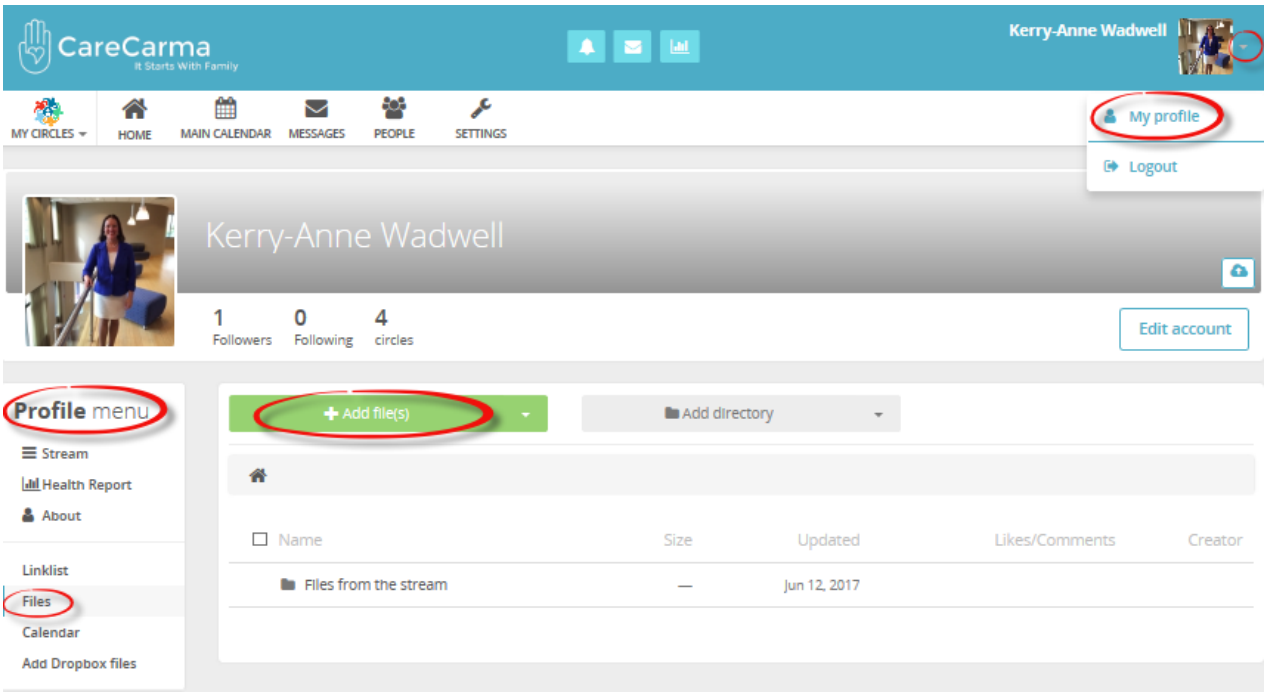

Select **(Delete)** to delete the link
Select **(Cancel)** to keep the link

CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Files

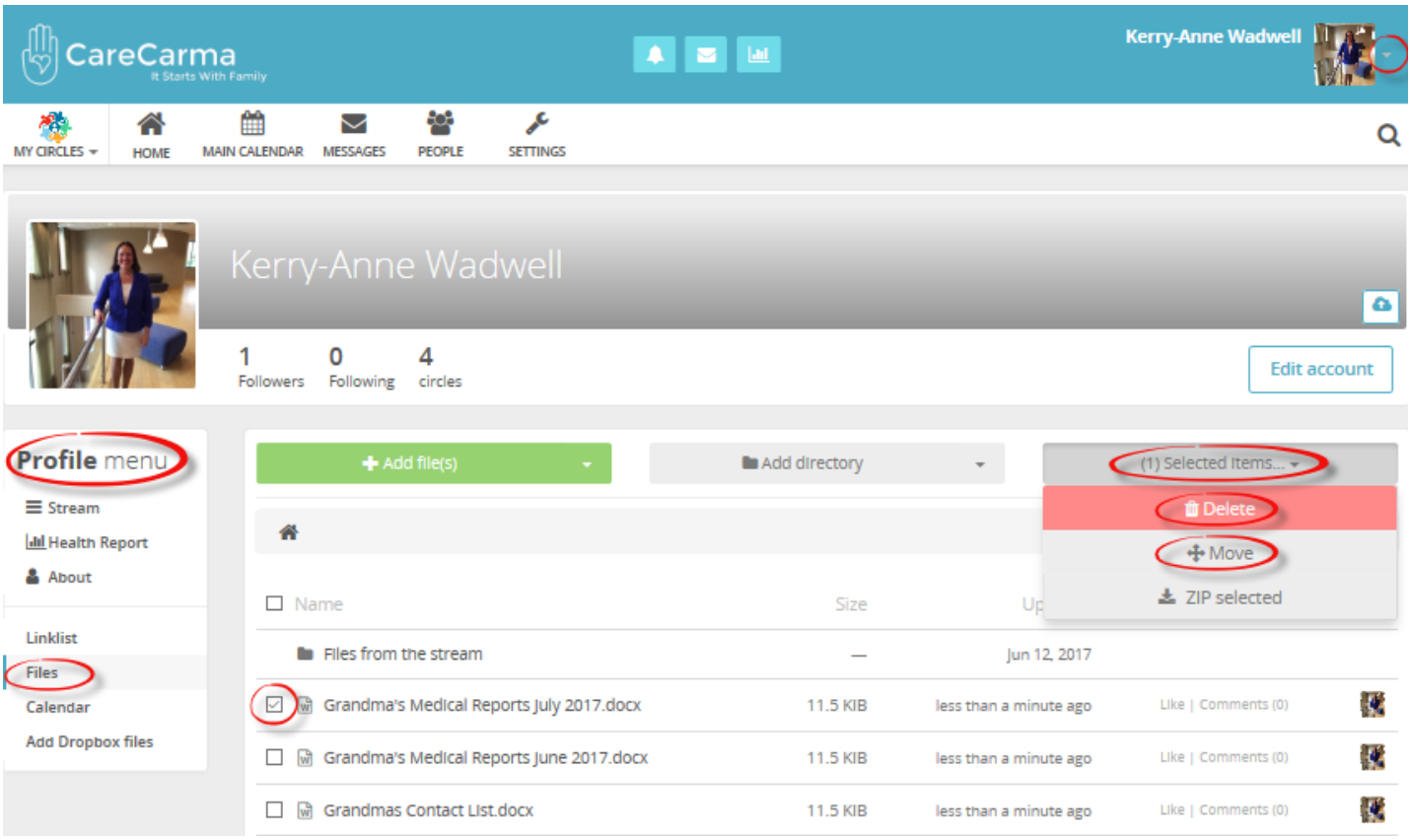



Selecting **(Files)** from the Profile Menu allows you to:
1. Access all files (from the stream) in one central location
2. Add files you want to share with this CareCircles members
3. Manage files added to this CareCircle
4. Create and manage directories to organize your files

Files from the Stream:
Any files uploaded in the (Stream) will automatically be saved to the (Files from the Stream) section

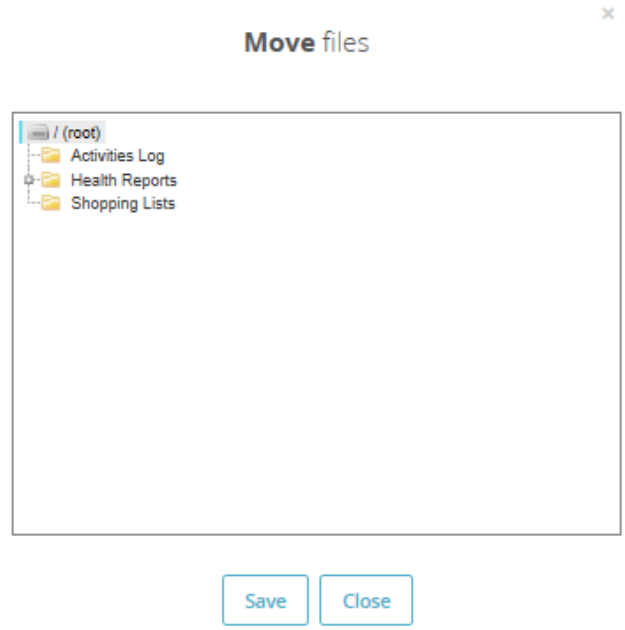



To Add Files:
Select **(+ Add files(s)**
Locate the file you want to add
Select **(open)**
Repeat these steps for each file you want to add

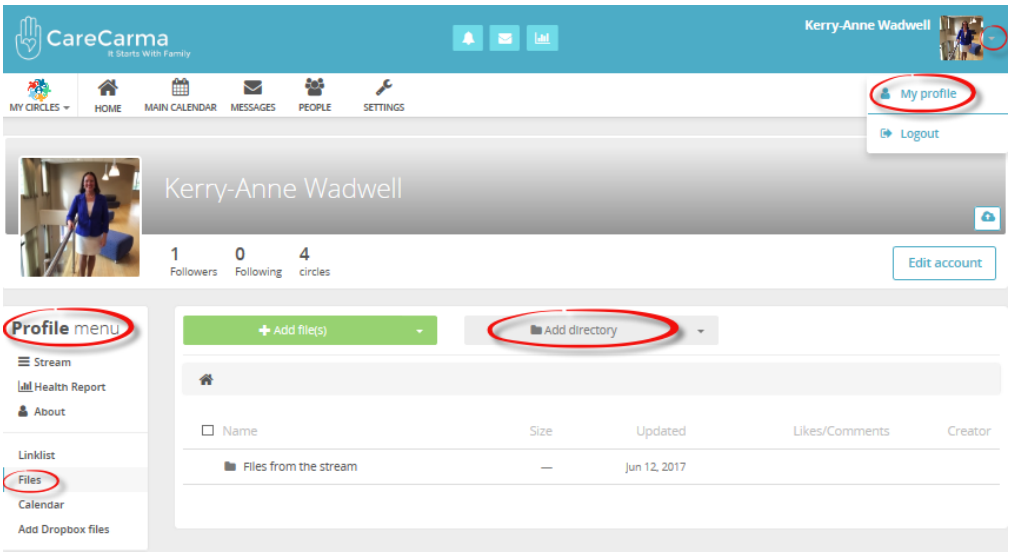



To Delete Files:
Check the box adjacent the file you want to delete
Select the **(Selected items)** section
Select**(Delete)**

To Move Files:
Check the box adjacent the file you want to move
Select the **(Selected items)** section
Select **(Move)** to access the (Move files) pop-up

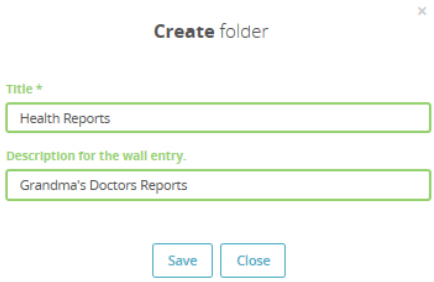



Select the location where you want the file moved to
Select **(Save)** to complete the move to the new location
Select **(Close)** to keep the file in the current location

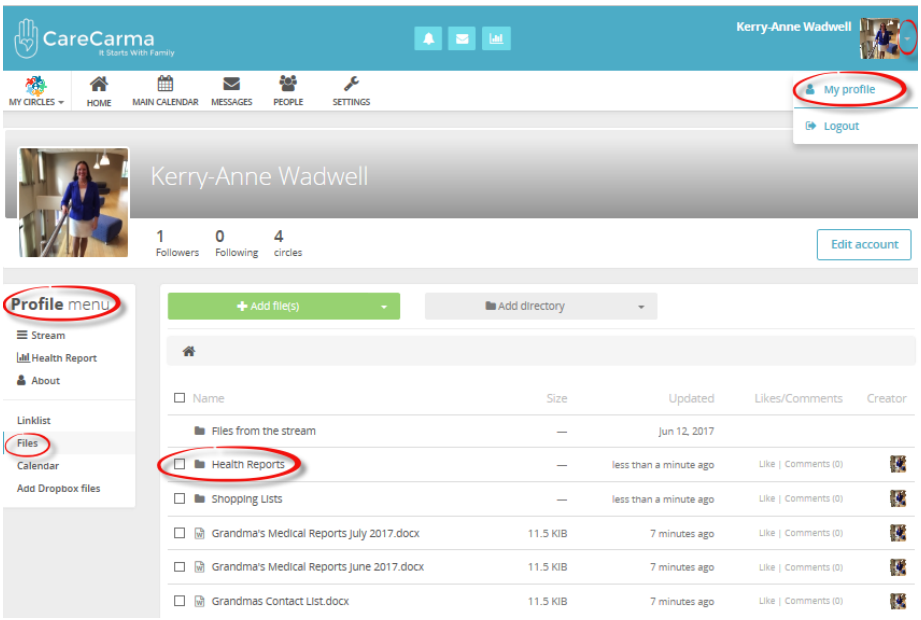



Directories can be used to organize your files into manageable categories, e.g. Health Reports, Shopping Lists

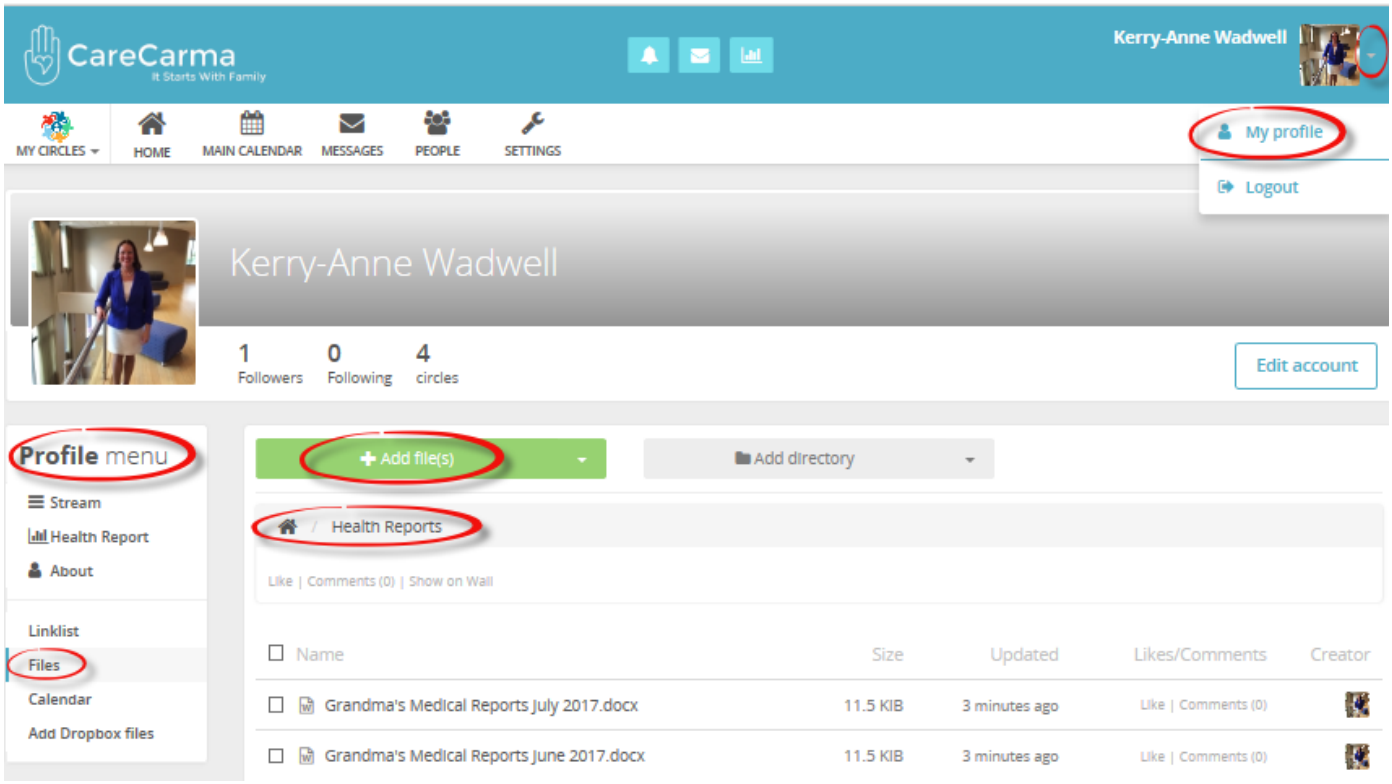
To add a directory:
Select **(+ Add directory)** to access the (Create folder) pop-up



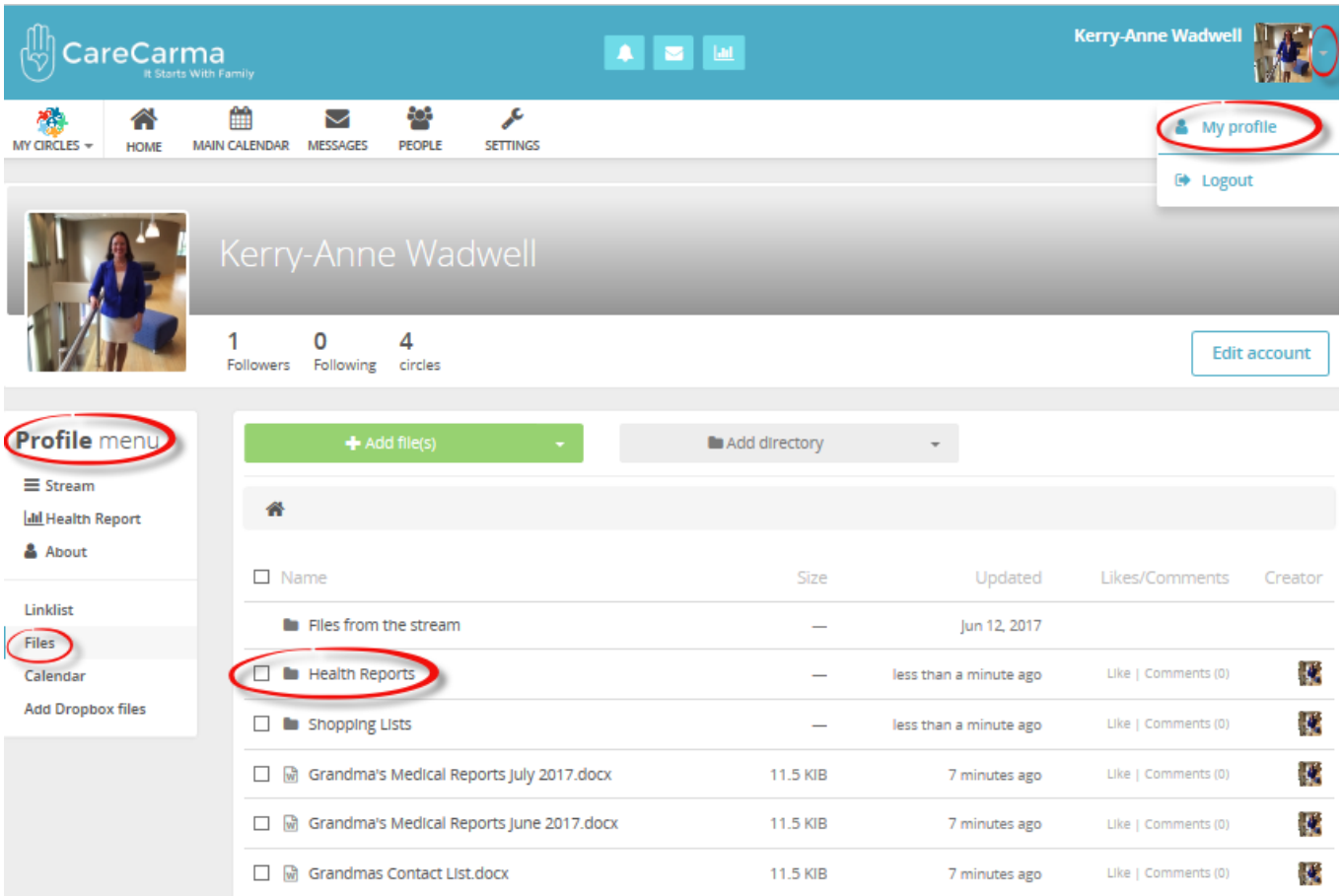

Enter a **(Title)** to name the directory, e.g. Health Reports
Optional: Enter a (Description for the wall entry)
Select **(Save)** to create the new directory
Repeat these steps for each directory you want to add
Select **(Close)** to not create the new directory



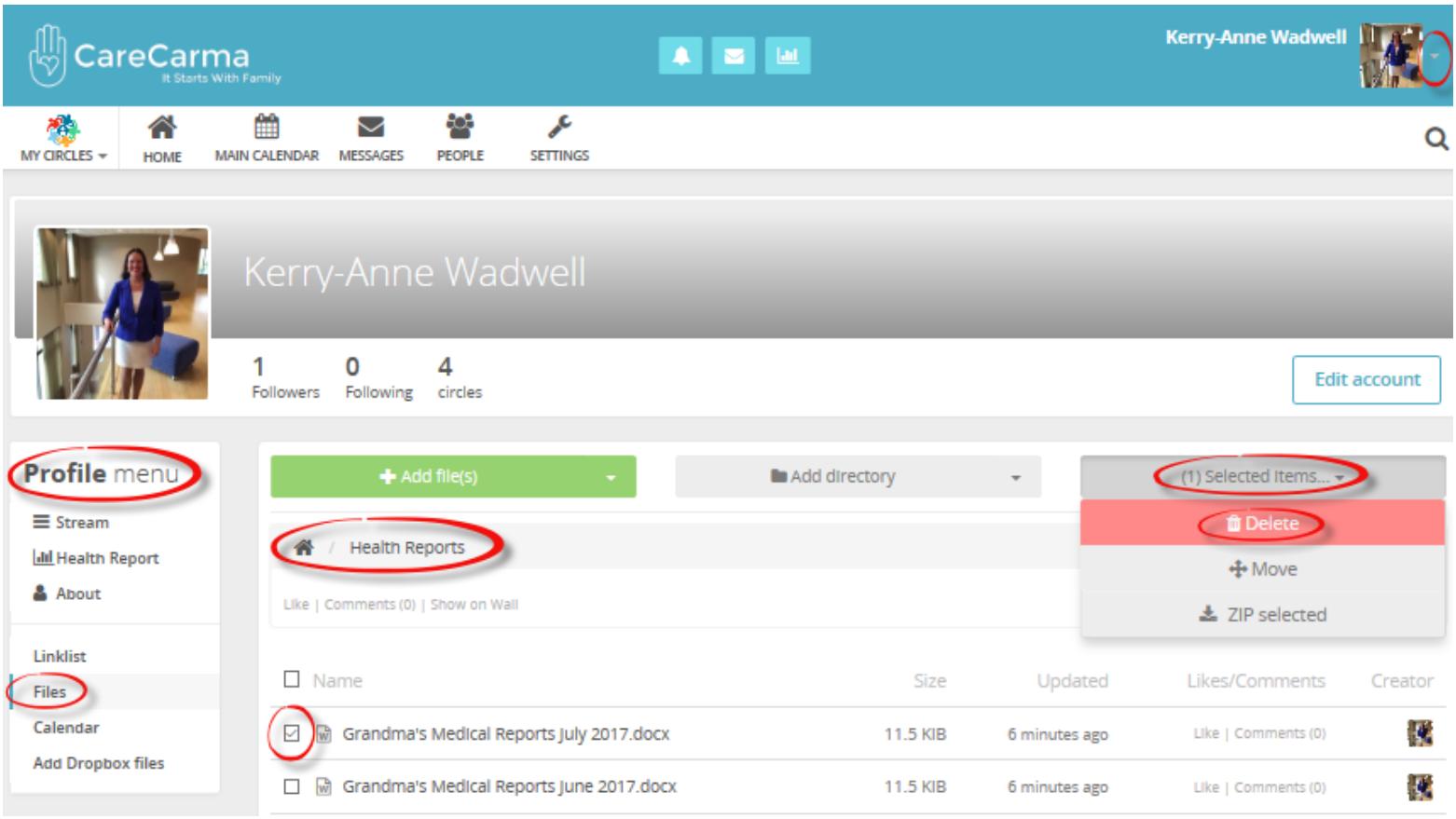

To add files to a directory:
Select the **(Directory)** you want to add files to




Select **(+ Add files(s)**
Locate the file you want to add
Select **(open)**
Repeat these steps for each file you want to add to this directory

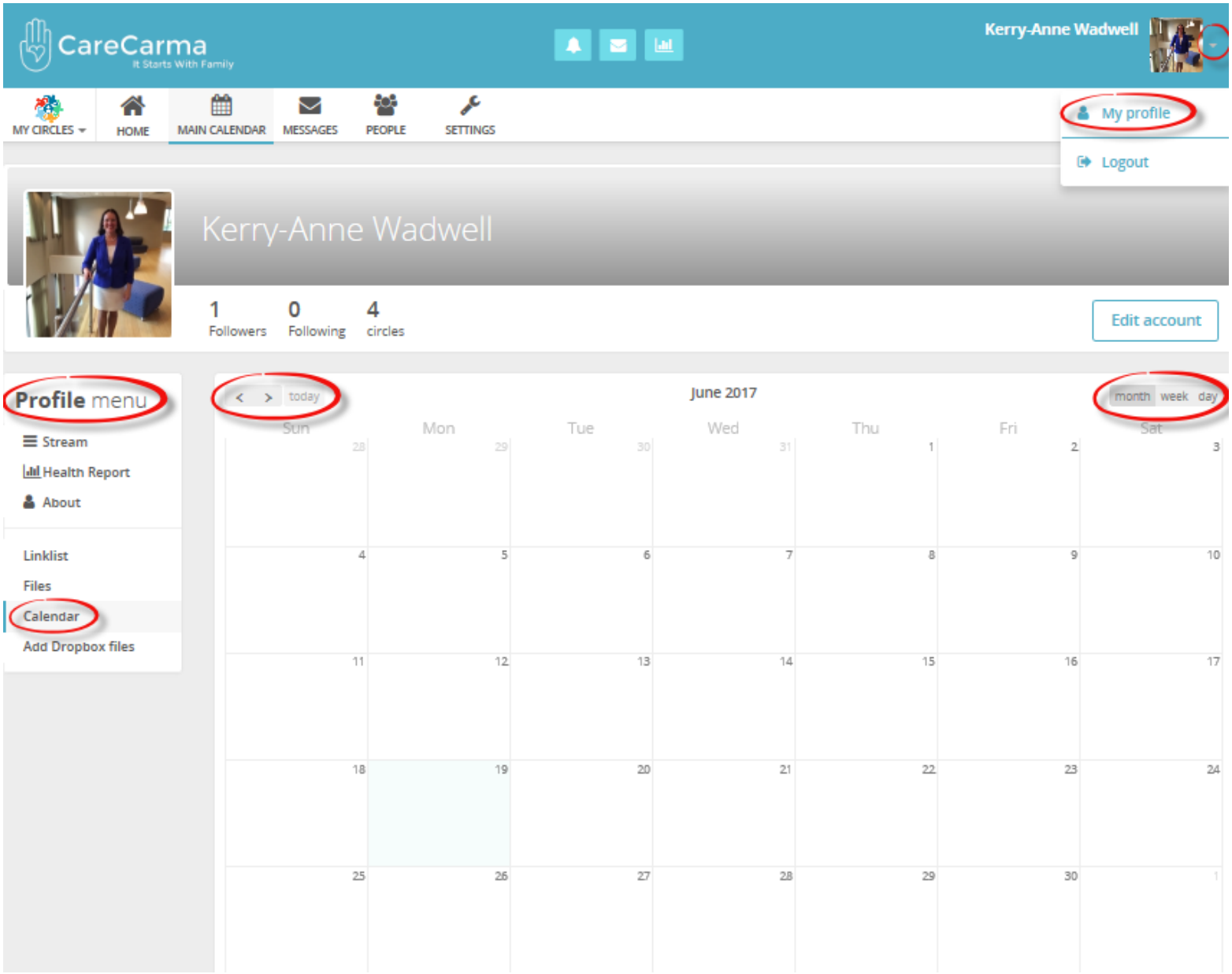



To Delete Files from a directory:
Select the **(Directory)** you want to delete files from



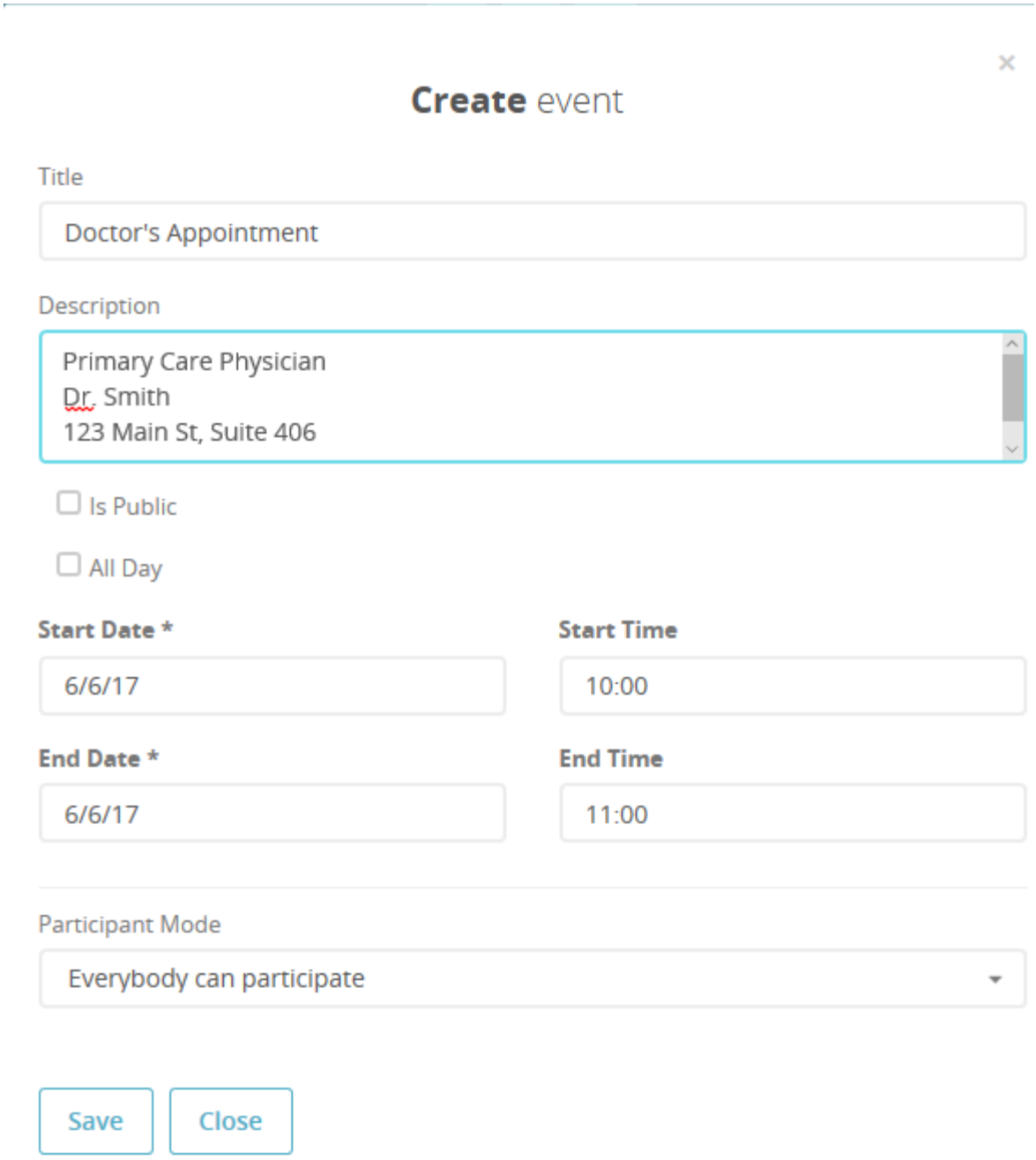

Check the box adjacent the file you want to delete
Select the **(Selected items)** section
Select**(Delete)**

CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Calendar




Select **(Calendar)** to view or schedule events on your personal calendar
Events scheduled on the Profile Menu Calendar can only be viewed or edited by you, no one else can see this calendar
Events scheduled on any Circle calendar(s) you have access to, will also appear on this Calendar and your Main Calendar
Editing an event on any of your calendars, will update the event in all relevant calendars
To view the calendar by month, select **(month)**
To view the calendar by week, select **(week)**
To view the calendar by day, select **(day)**
**(Today)** will be shaded a different color to all other days, regardless of which calendar view you select
To go back in time, select **(<)**
To go forward in time, select **(>)**

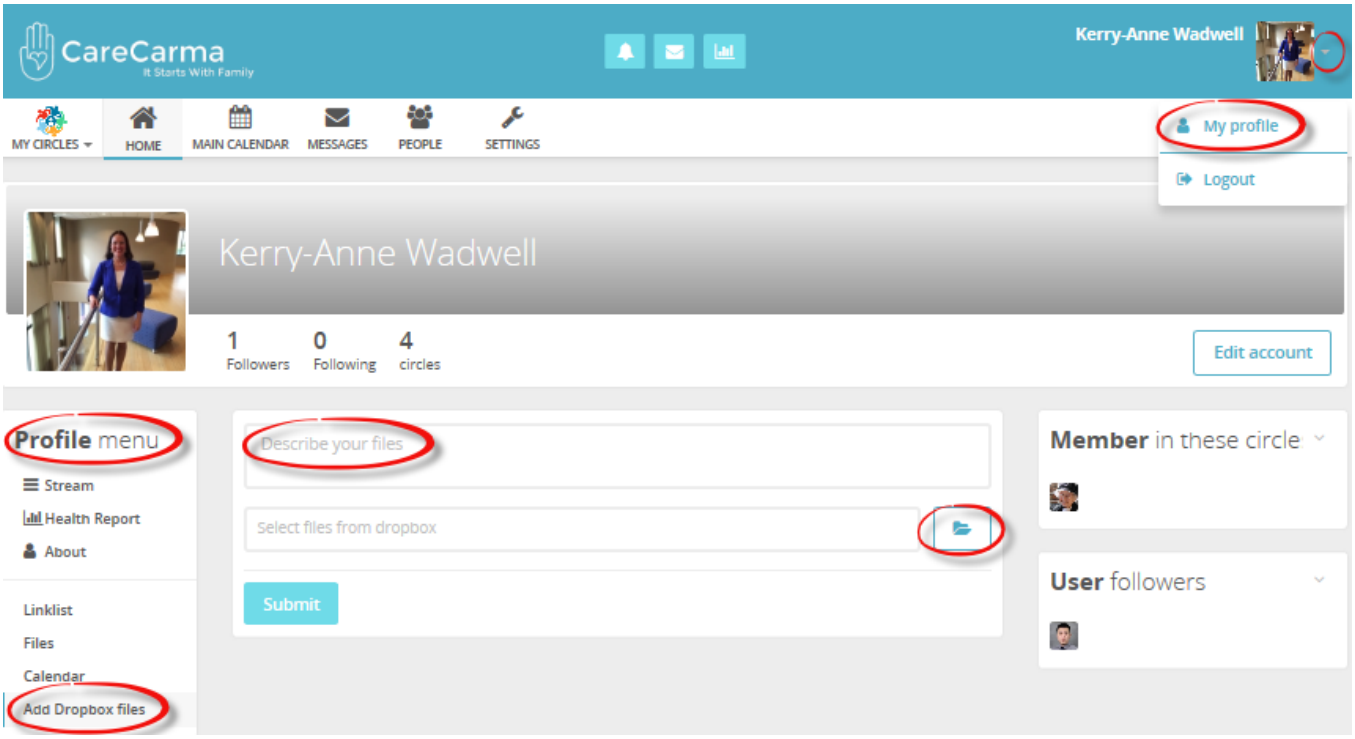
To create a new event:
Select **(Calendar)**
Select the **(Day)** of the event to access the **(Create Event)** pop up



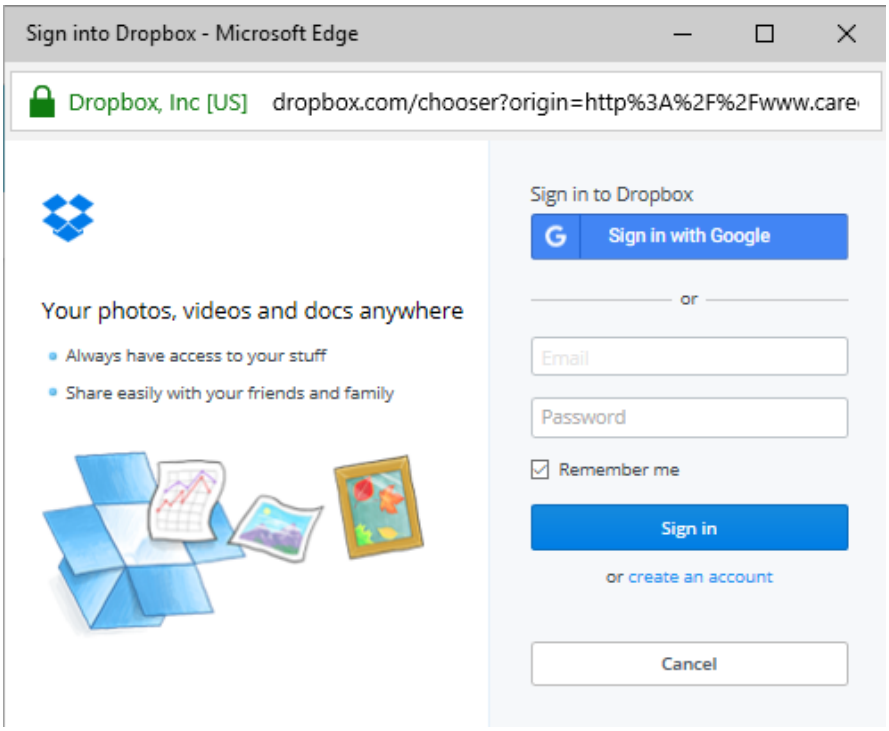

In the **(Title)** section, enter a title description. E.g. Doctors Appointment
In the **(Description)** section, enter a description. E.g. 10:00 a.m. Dr. Smith Oncologist 123 Main St, Suite 406
To NOT allow all CareCarma members to see the calendar entry, leave the **(Is Public)** box UNCHECKED
To allow all CareCarma members to see the calendar entry, check the **(Public)** box
In the **(Start Date)** section, enter the start date of the event
In the **(End Date)** section, enter the end date of the event
In the **(Start Time)** section, enter the start time of the event in the format (hh:mm)
In the **(End Time)** section, enter the end time of the event in the format (hh:mm)
In the Participation Mode section, select **(No participants)** if you want other CareCircle members to NOT have the option to attend the event
In the Participation Mode Section, select **(Everyone can participate)** if you want other CareCircle members to have the option to attend the event
Review the calendar details for accuracy and make changes as necessary
Select **(Save)** when the calendar details are accurate
If you don't want to save the calendar event, select **(Close)** or **(X)**

CareCarma Toolbar – Drop Down Arrow – My Profile – Profile Menu – Add Dropbox files

Select (Add Dropbox files) to add files stored in a Dropbox

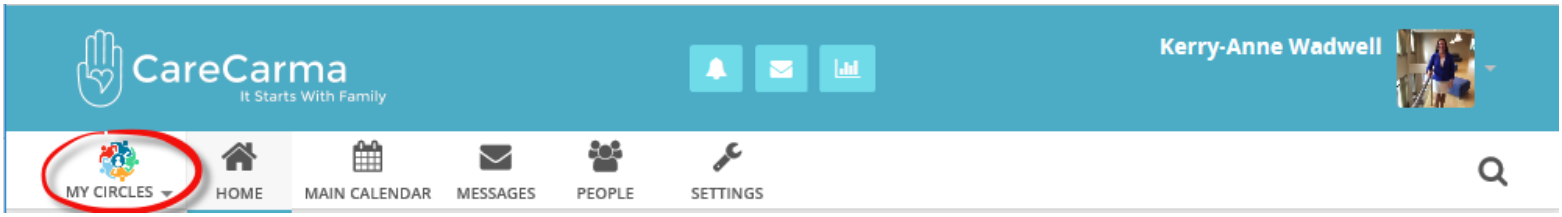



To Add Dropbox files:
Enter a title or description in the **(Describe your files)** section
Select the Dropbox icon to access the Dropbox account where the file is located




Sign in to Dropbox
Locate the file you want to add
Select **(open)**
Repeat these steps for each file you want to add
Select **(Submit)** to add the file

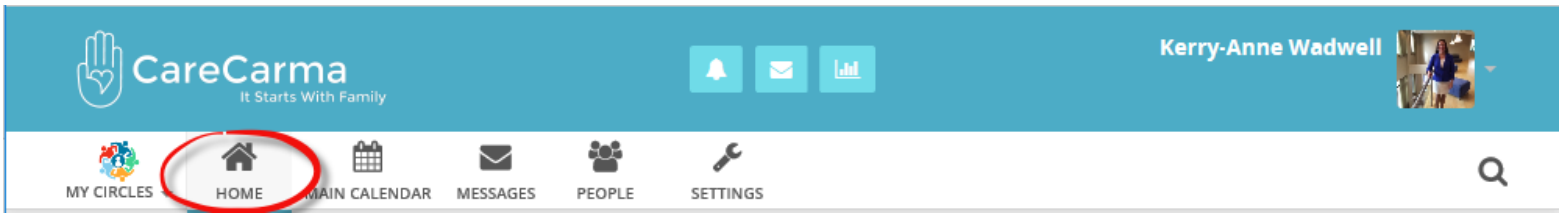
Menu Toolbar – My Circles




Select the **(My Circles)** icon to:
1. Search for publicly visible CareCircles which you are not a current member
2. Access CareCircles for which you are a member
3. Create new CareCircles

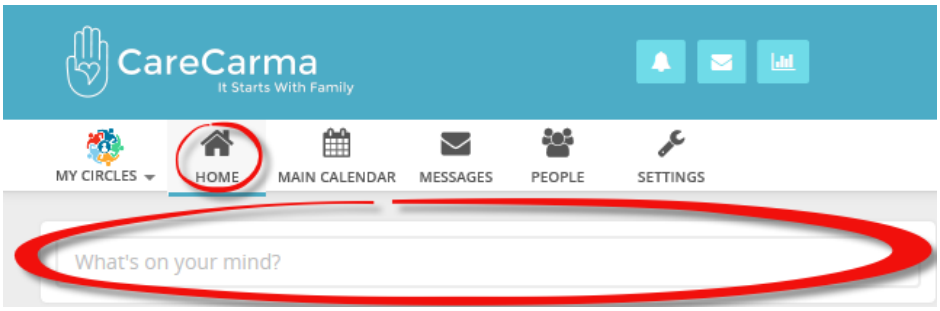
Refer to **CARECIRCLE FUNCTIONS AND TOOLS** for further instructions

Menu Toolbar – Home

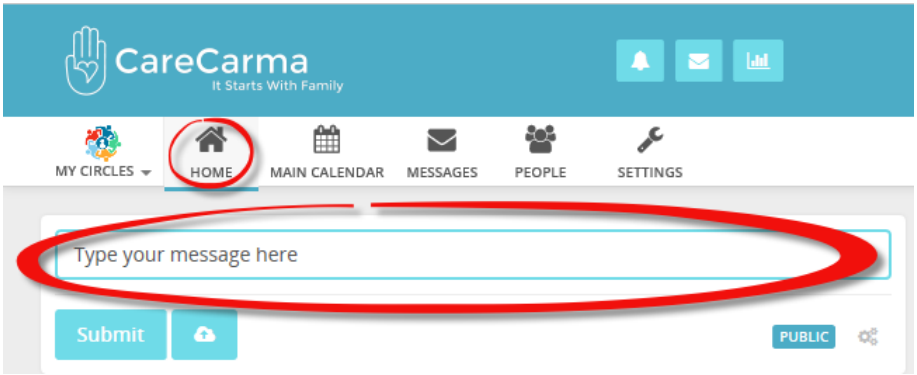



Select the **(Home)** icon to access the Home Page Dashboard
On the Home Page Dashboard, you can:
1. Post communications
2. Review a history of posted communications, events, and activities
3. Review a list of Latest Activities

Menu Toolbar – Home – Post Communications

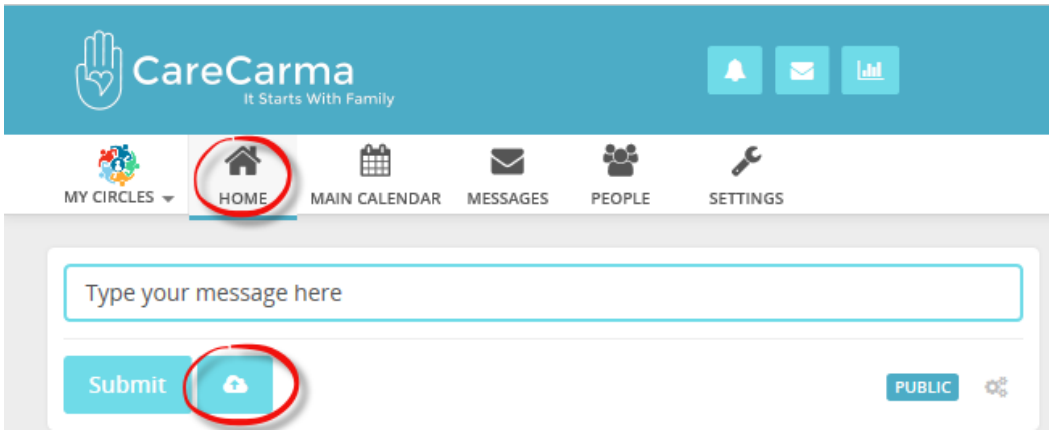



To post a message:
Select the **(What's on your mind?)** section

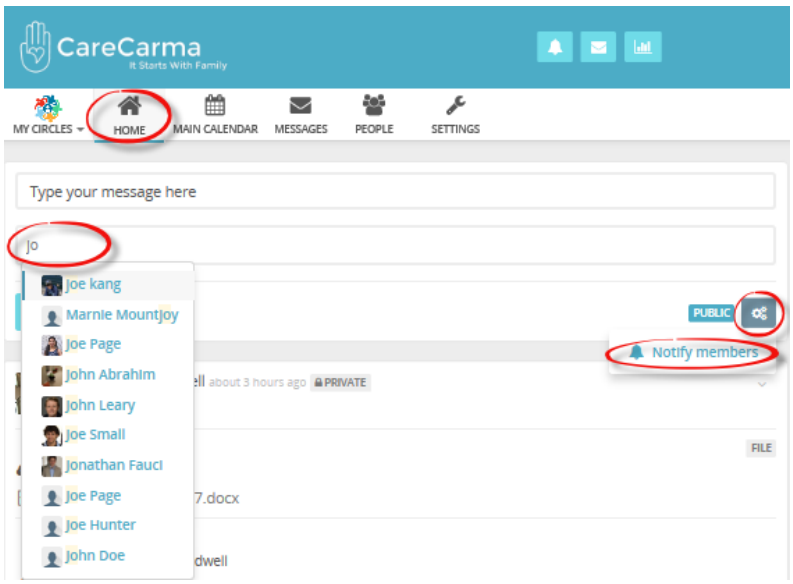



Type a message

To add files to your message:



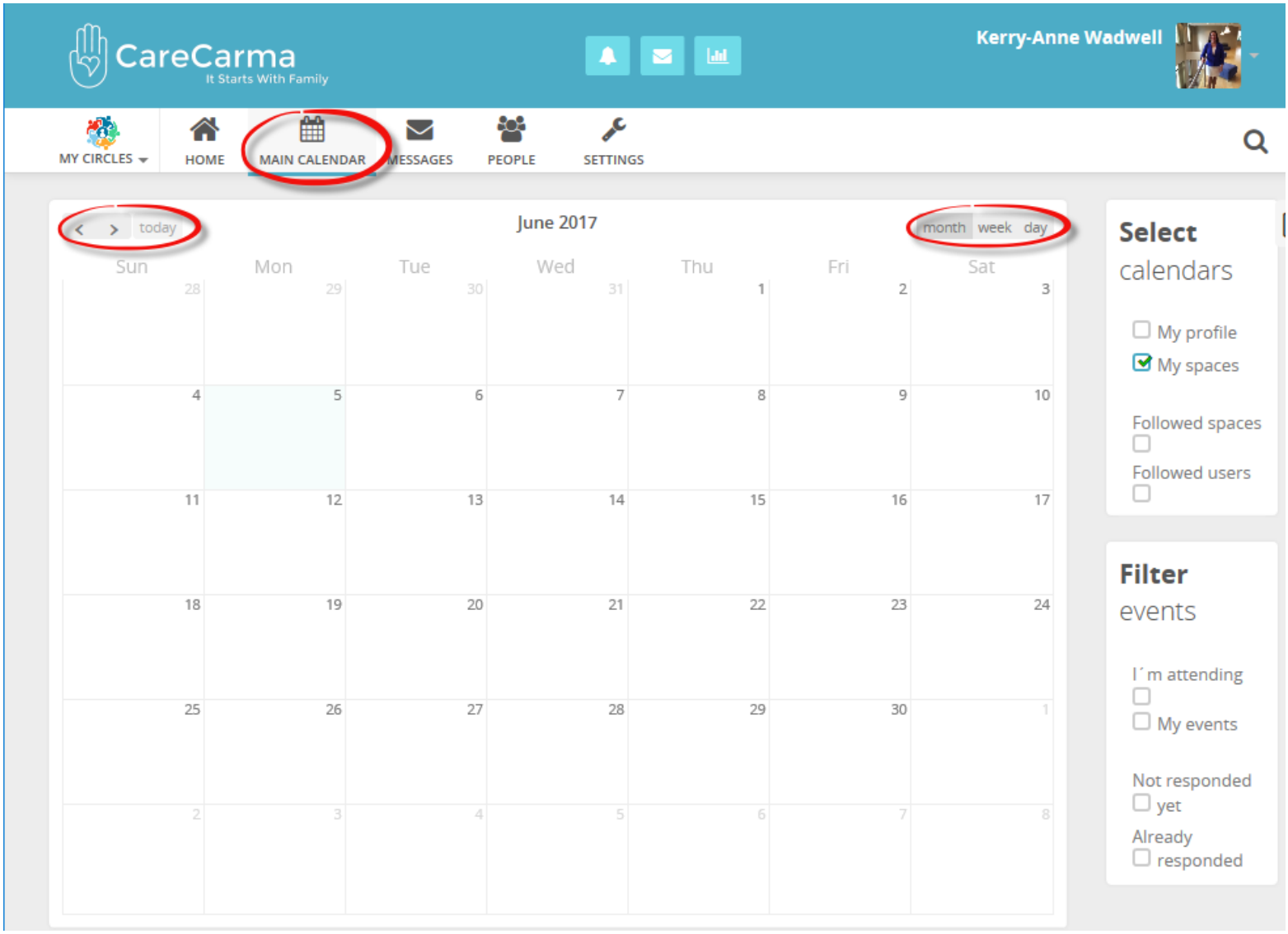

Select the **(upload image)** icon
Locate the file you want to attach
Select **(open)**
Note: Messages posted from the (Home) page are Public Messages viewable by all CareCarma members
Note: To post messages privately to CareCircle Members only, review the instructions (My Circles – Circle Menu – Stream)




To **(Notify Members)** of a pending message:
If you want to send a notification to members letting them know there is a message pending
Select the **(Gear Icon)**
Select **(Notify Members)**
Start typing a member's name
Select the member from the drop-down menu
Repeat the last two steps until everyone you want to send the notification to is included

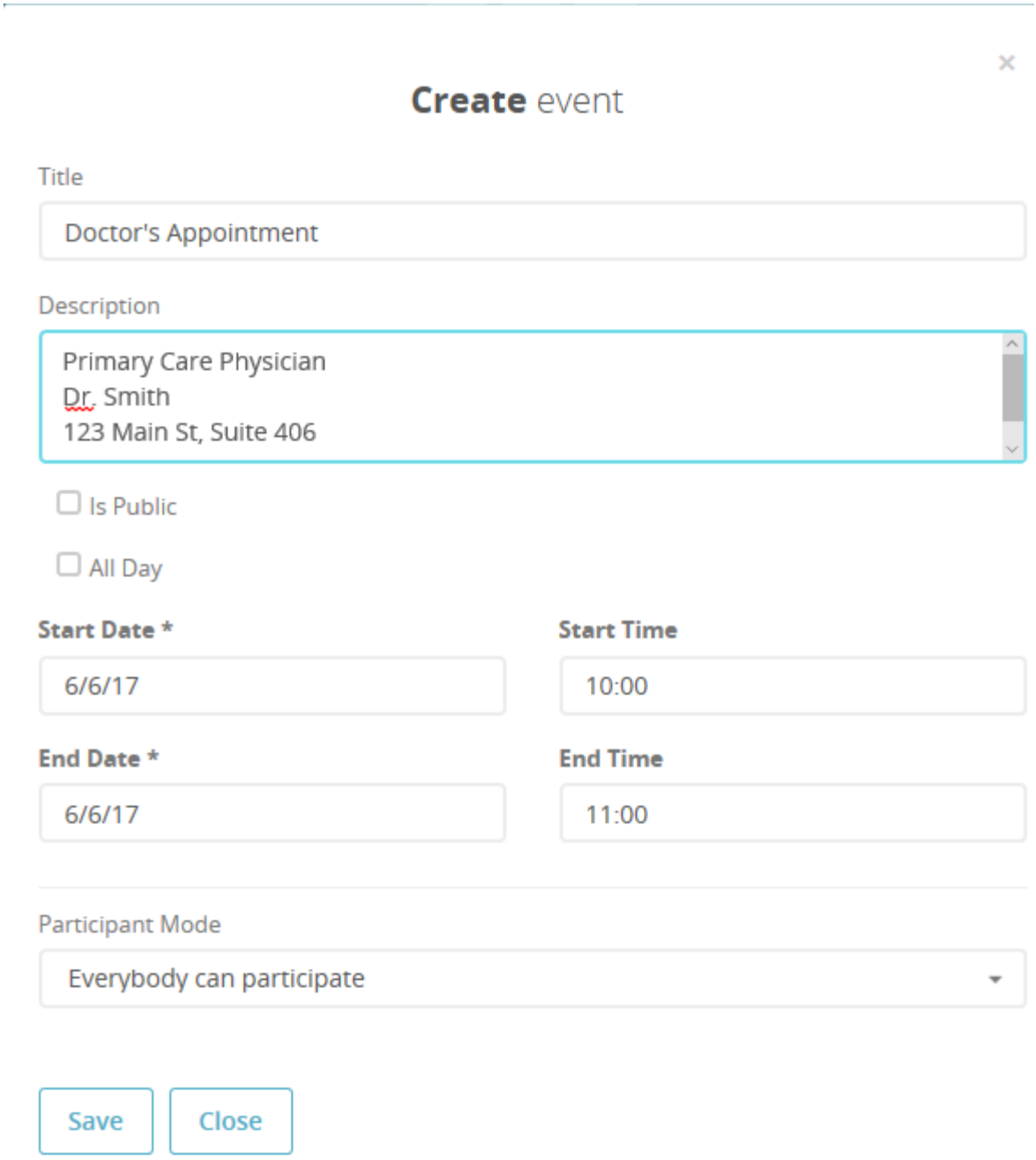
Select **(Submit)**, once the message is ready to send out

Menu Toolbar –Main Calendar



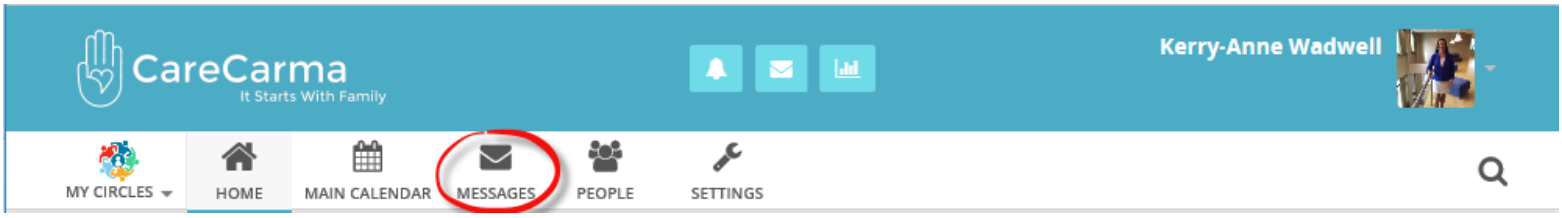

Select the **(Main Calendar)** icon to view or schedule events on your personal calendar
Events scheduled on the Main Calendar can only be viewed or edited by you, no other CareCarma member can see this calendar
Events scheduled on any Circle calendar(s) you have access to, will also appear on your Main Calendar
Editing an event in either the Main Calendar or Circle Calendar(s), will update the event in all relevant calendars
To view the calendar by month, select **(month)**
To view the calendar by week, select **(week)**
To view the calendar by day, select **(day)**
**(Today)** will be shaded a different color to all other days, regardless of which calendar view you select
To go back in time, select **(<)**
To go forward in time, select **(>)**

To create a new event:
Select the **(Main Calendar)** icon
Select the **(Day)** of the event
When the **(Create Event)** pop up appears:



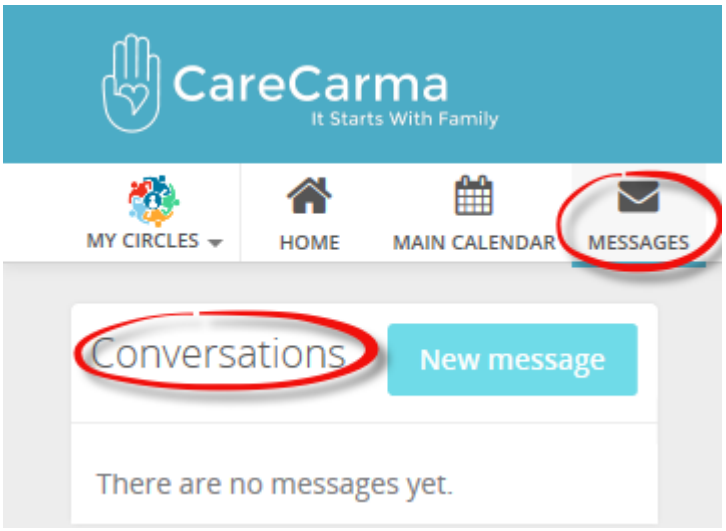

In the **(Title)** section, enter a title description. E.g. Doctors Appointment
In the **(Description)** section, enter a description. E.g. 10:00 a.m. Dr. Smith Oncologist 123 Main St, Suite 406
To NOT allow all CareCarma members to see the calendar entry, leave the **(Is Public)** box UNCHECKED
To allow all CareCarma members to see the calendar entry, check the **(Public)** box
In the **(Start Date)** section, enter the start date of the event
In the **(End Date)** section, enter the end date of the event
In the **(Start Time)** section, enter the start time of the event in the format (hh:mm)
In the **(End Time)** section, enter the end time of the event in the format (hh:mm)
In the Participation Mode section, select **(No participants)** if you want other CareCircle members to NOT have the option to attend the event
In the Participation Mode Section, select **(Everyone can participate)** if you want other CareCircle members to have the option to attend the event
Review the calendar details for accuracy and make changes as necessary
Select **(Save)** when the calendar details are accurate
If you don't want to save the calendar event, select **(Close)** or **(X)**

Menu Toolbar – Messages



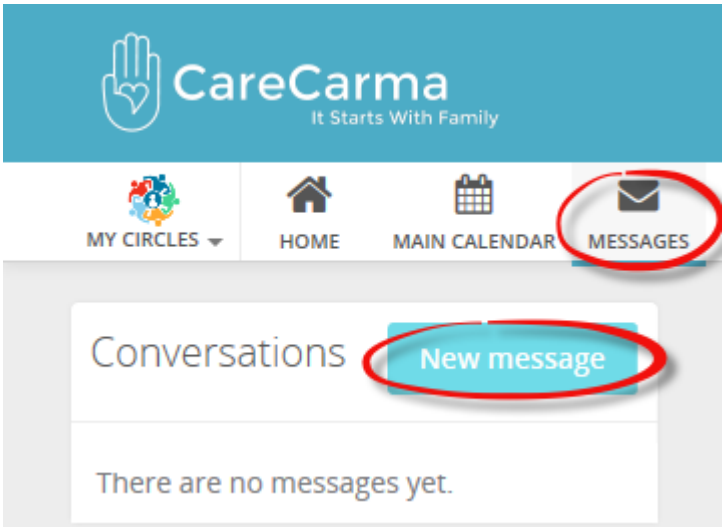

Select the **(Messages)** icon to:
1. Access a history of received and sent email conversations
2. Create new email messages

Menu Toolbar – Messages – Conversations

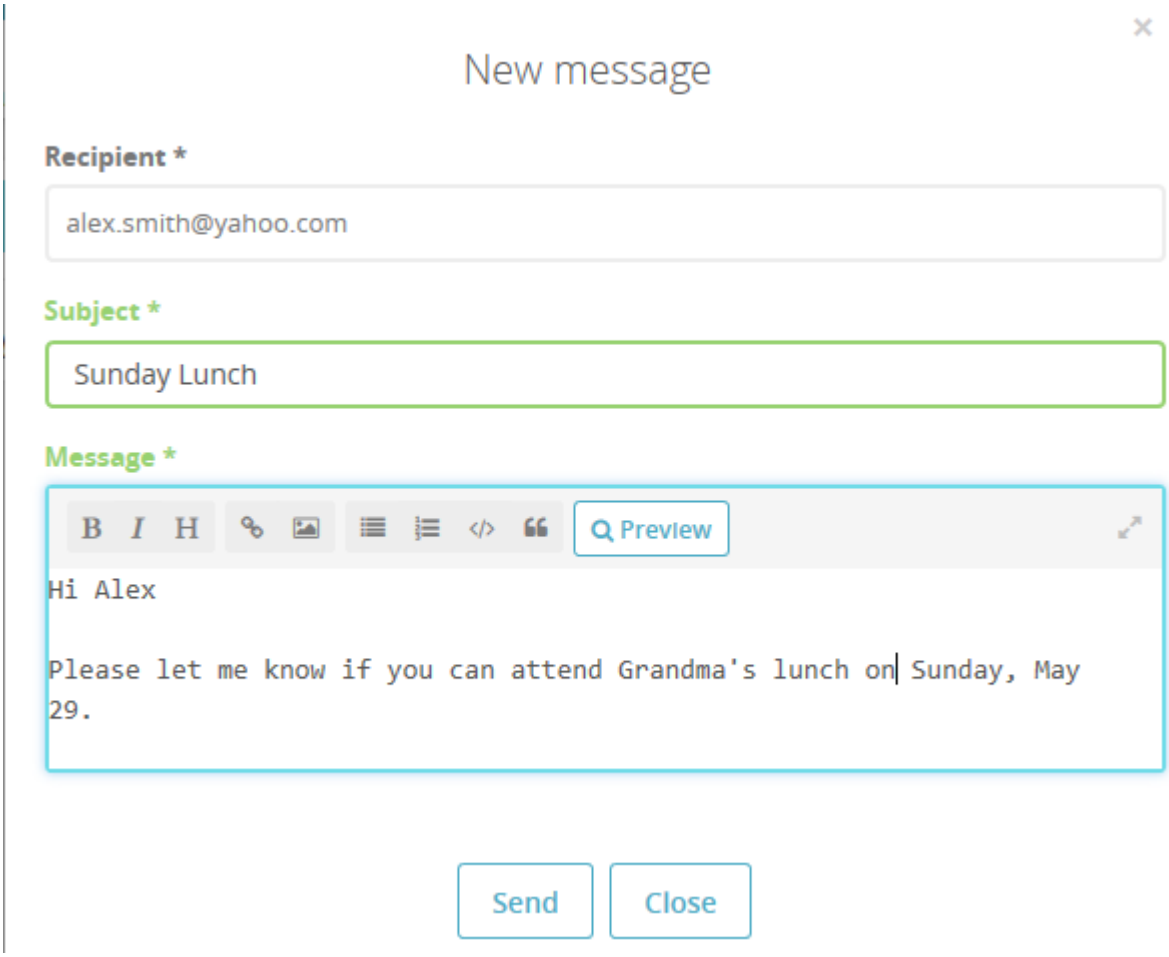



Select (Conversations) to access a history of received and sent email conversations

Menu Toolbar – Messages –New Message

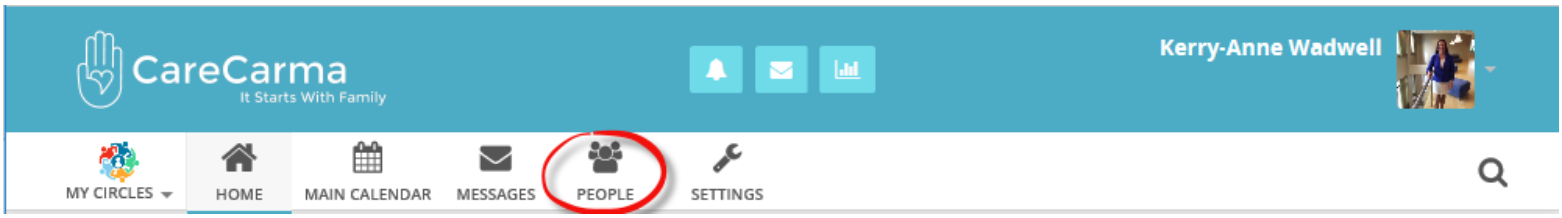


To create a new message conversation:
Select **(New Message)** to access the (New message) pop-up



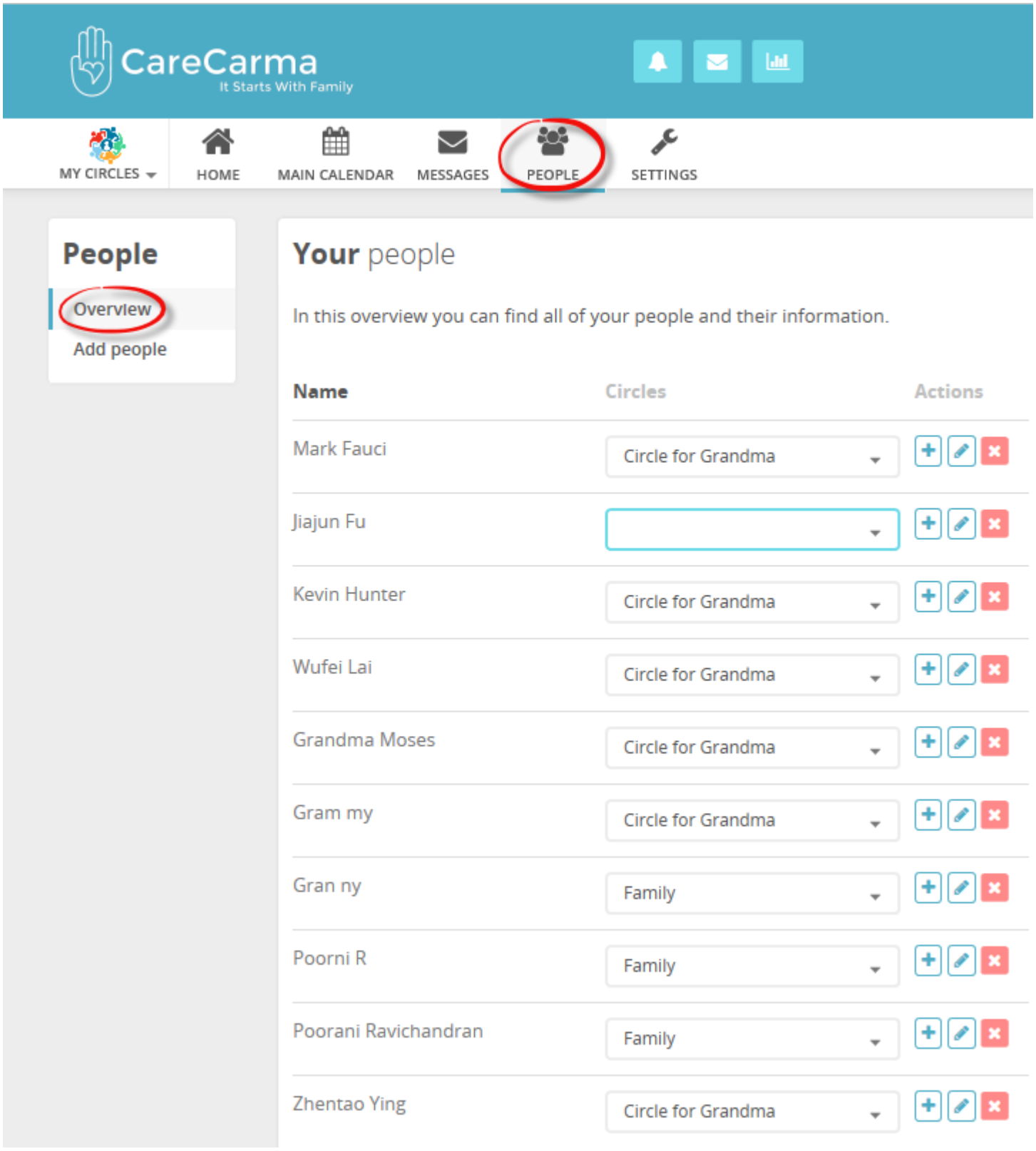

In the (**Recipient)** section, enter one or more email addresses
In the **(Subject)** section, enter a subject description
In the **(Message)** section, enter your message
Optional: Use the tools on the toolbar to edit the message
When your message is complete, select **(Send)**
If you don't want to send the message, select **(Close)**

Menu Toolbar –People



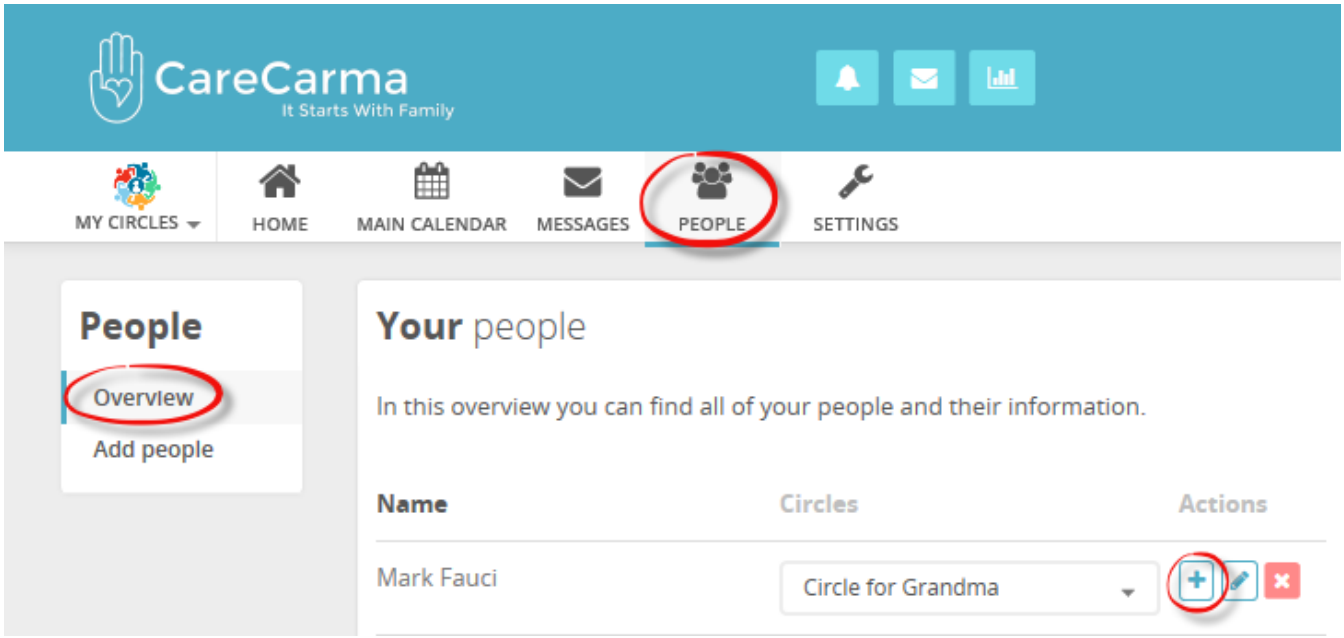

Select the (People) icon to:
1. Display an (Overview) of all your people and their information
2. Add new people to your CareCarma list of people

Menu Toolbar –People – Overview

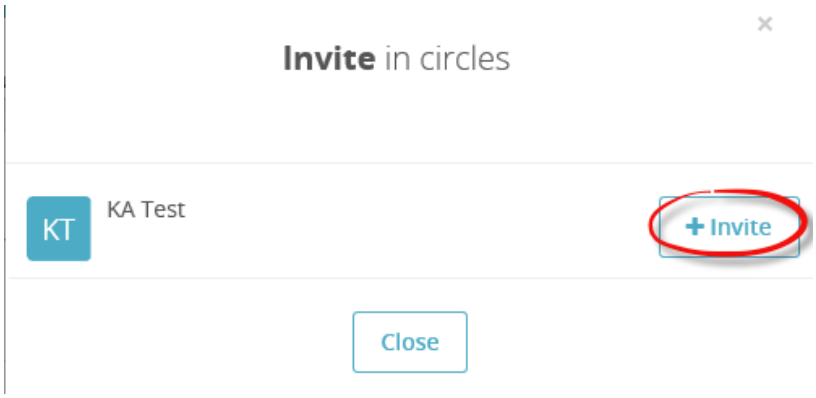



Lists the **(Name)** of Your people
Lists which **Circle(s)** they belong to
Lists the **(actions)** available for each person on the list

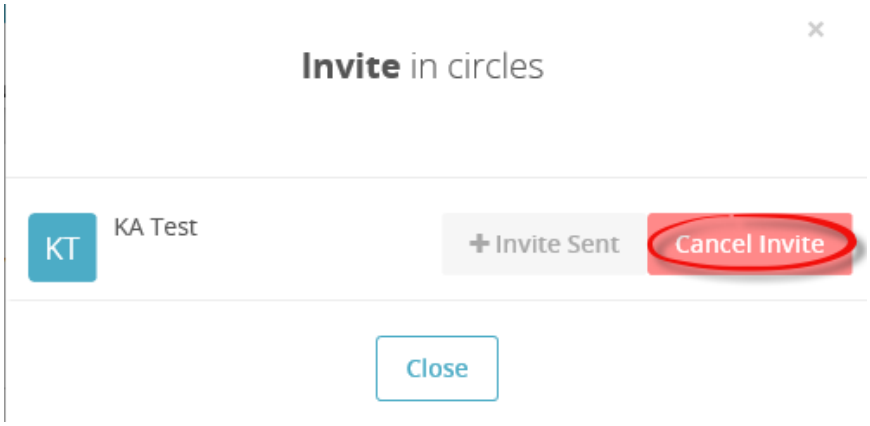
Menu Toolbar –People – Overview – Add




You can **add (+)** someone on the list to one or more CareCircles
Select the **add (+)** icon adjacent the person you want to add to a CareCircle to access the (Invite in Circles) pop-up

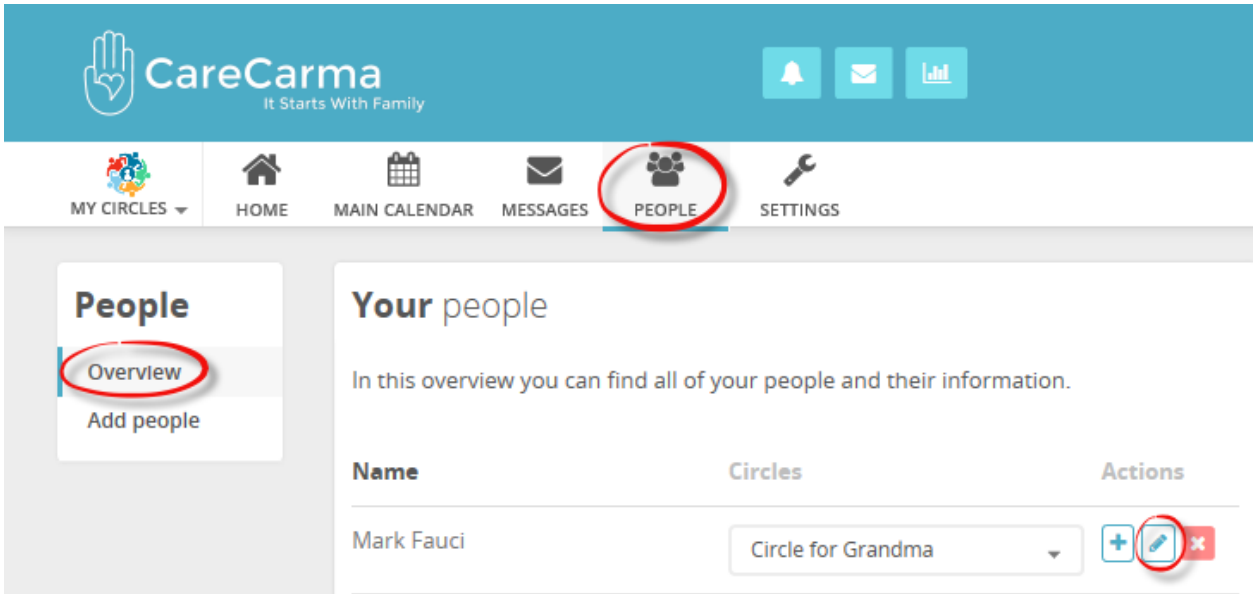



Selecting **(+ Invite)** adjacent the CareCircle you want to add them to will invite them automatically to the selected CareCircle



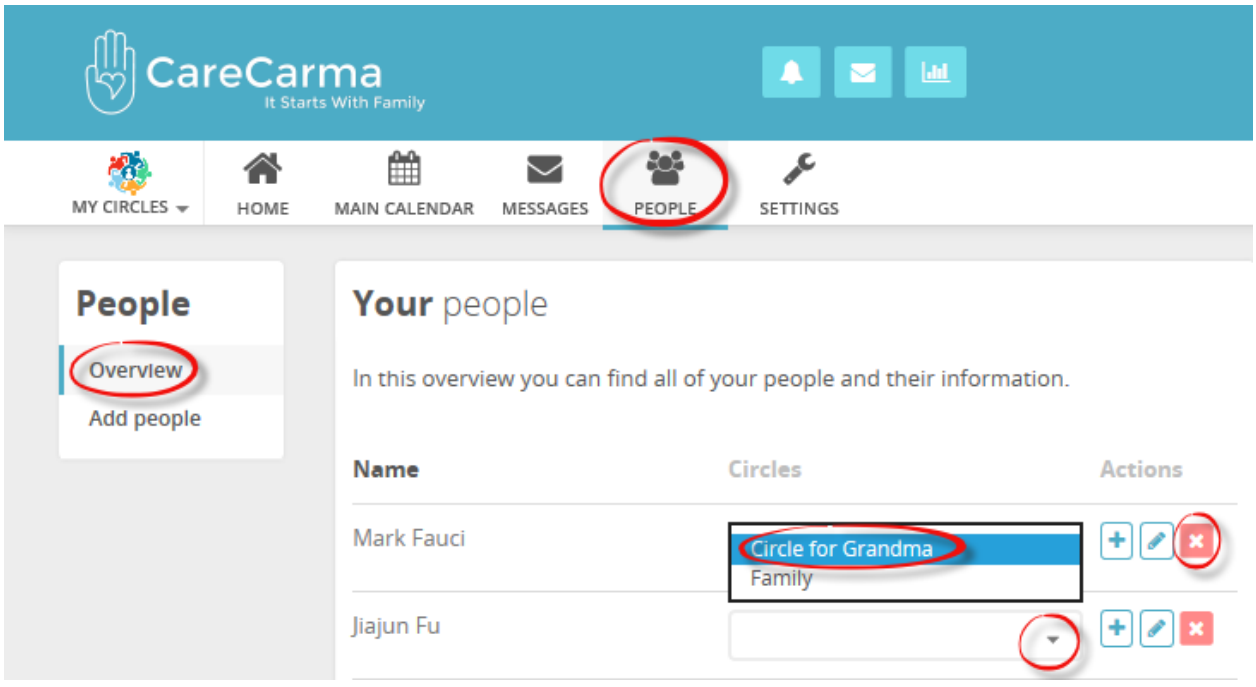

The (Invite in circles) pop-up will change and give you the option to (Cancel invite)
Select **(Cancel Invite)** to cancel the invite
Select **(Close)** to not cancel the invite

Menu Toolbar –People – Overview – Edit



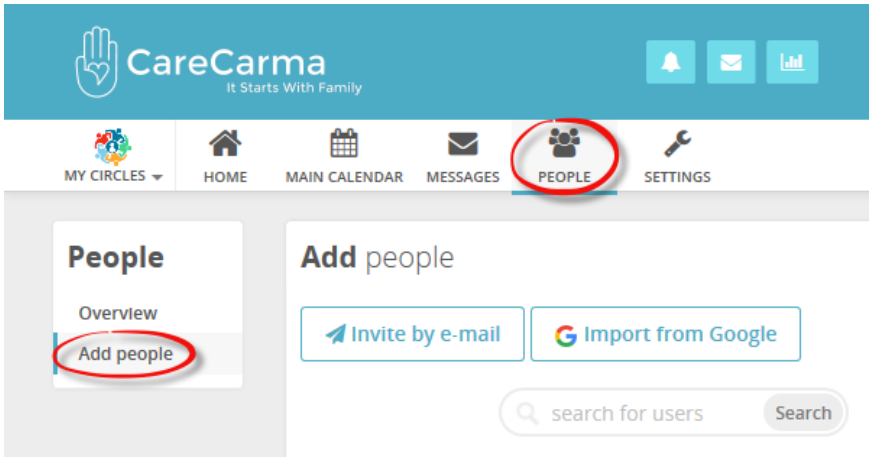

You can **edit (✎)** a member's details
Select the **edit (✎)** icon adjacent the person you want to edit
Make the necessary changes to the following information:
Their **(Name)**
A **(Nickname)** you use for this person
Your **(relationship)** to this person
The **(contact details)** for this person
If you make changes, select **(Save).** You'll automatically be returned to (Your People)
If you made changes but you don't want to keep them, select **(Overview)** to return to (Your People)
If you didn't make changes, select **(Overview)** to return to (Your People)

Menu Toolbar –People – Overview – Delete



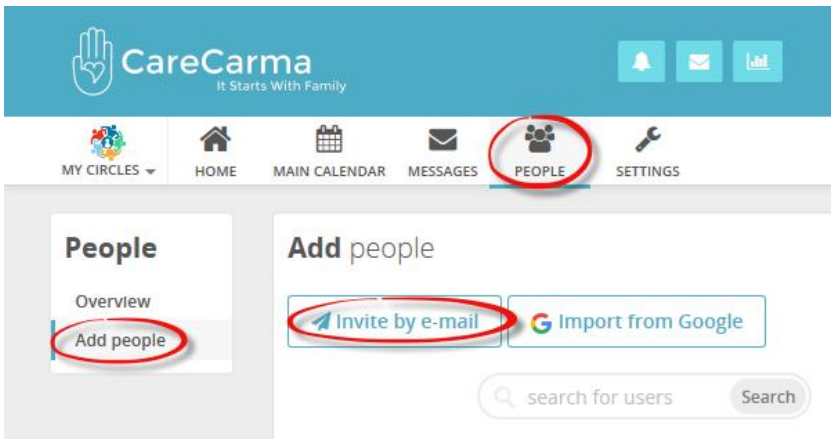

You can **delete (X)** a person on the list from any particular CareCircle or from all CareCircles
Select the drop-down arrow in the (Circles) section
Select the CareCircle you want to delete
Select the **delete (X)** icon

Menu Toolbar –People –Add People

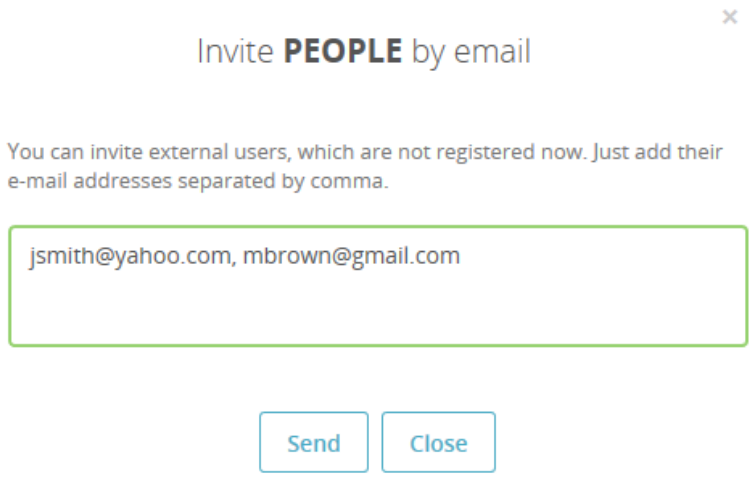



Select **(Add People)** to:
1. Invite people to join CareCarma via email
2. Invite people to join CareCarma via an Import from Google
3. Search for CareCarma members to invite to your CareCarma list of people

To invite people to join CareCarma via email:

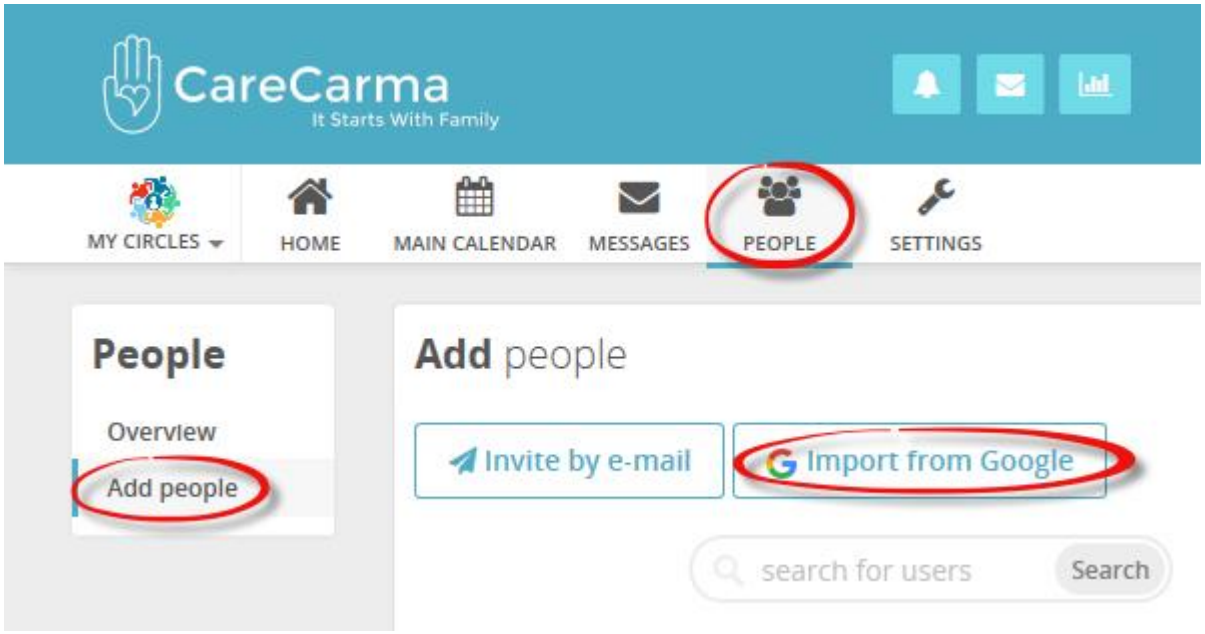



Select the **(Invite by e-mail)** section to access the (Invite PEOPLE by email) pop-up



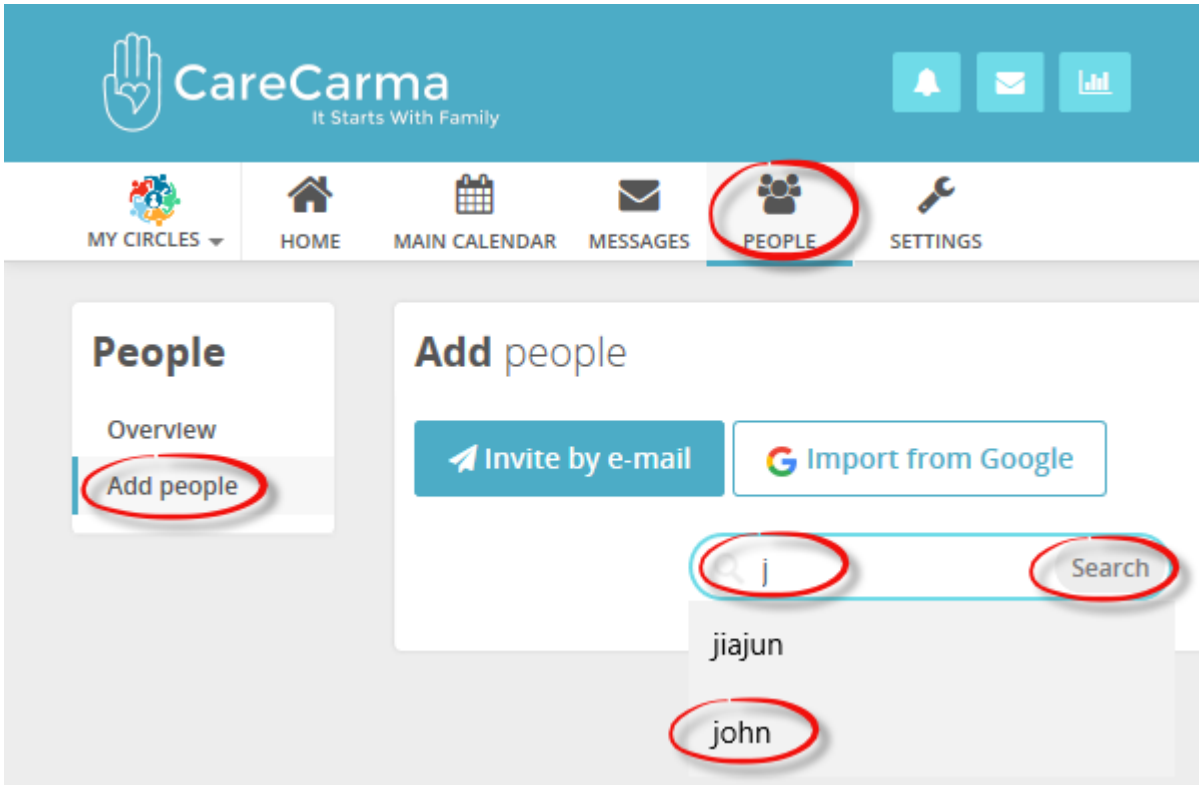

Type the email address of the invitee
To invite more than one person separate the email addresses with a comma (,)
Select **(Send)** to send an email invitation
Select **(Close)** to NOT send an email invitation

To invite people to join CareCarma via an Import from Google:



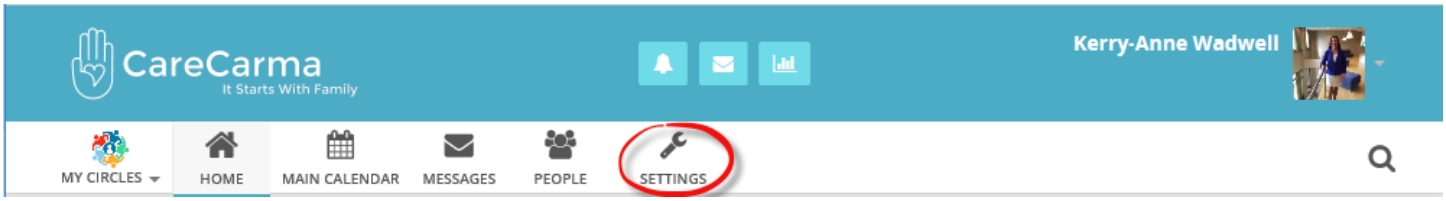

Select the **(Import from Google)** section
Select the **(Invite Contact)** adjacent the person you want to invite to join CareCarma
Automatically Send invitation email to invite person to join CareCarma

To search for CareCarma members to invite to your CareCarma list of people:




In the **(search for users)** section, start typing a name
As you type, a list of CareCarma members matching the typed name will appear on a drop-down list
Select a name from the drop-down list
Select **(Search)**

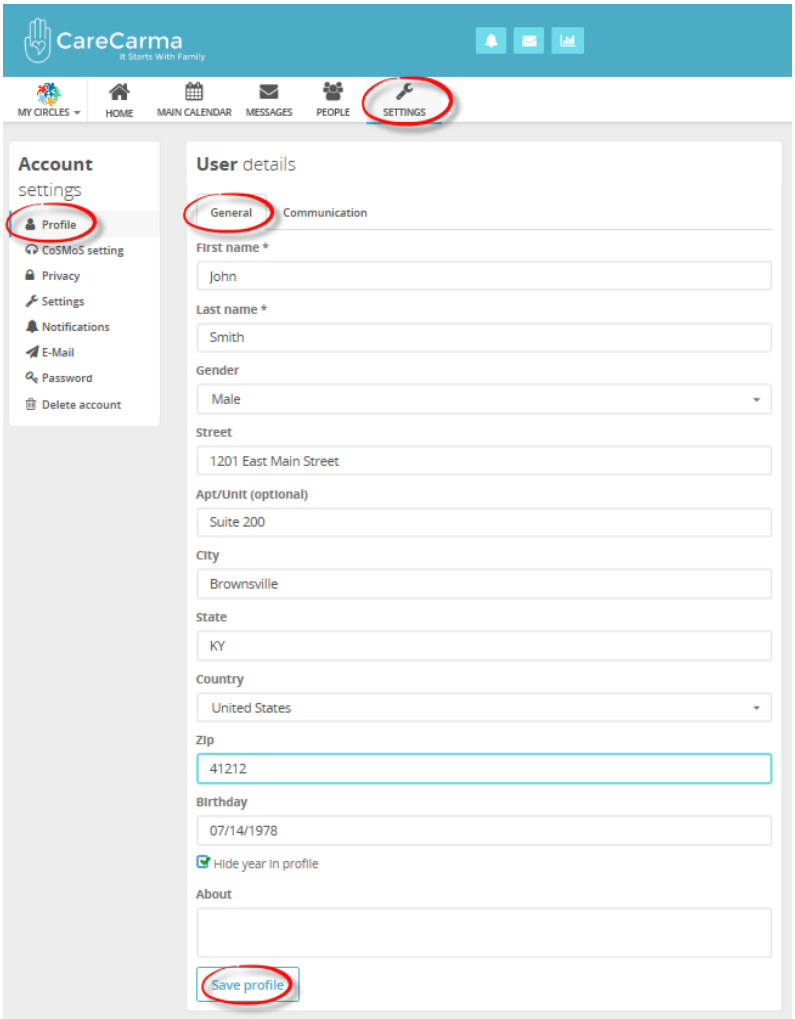
Menu Toolbar –Settings




Select **(Settings)** to set up or make changes to the following account settings:

| | | | |
|---|---|---|---|
| 1. Profile | 2. CoSMoS | 3. Privacy | 4. Settings |
| 5. Notifications | 6. E-Mail | 7. Password | 8. Delete Account |

Menu Toolbar –Settings – Profile

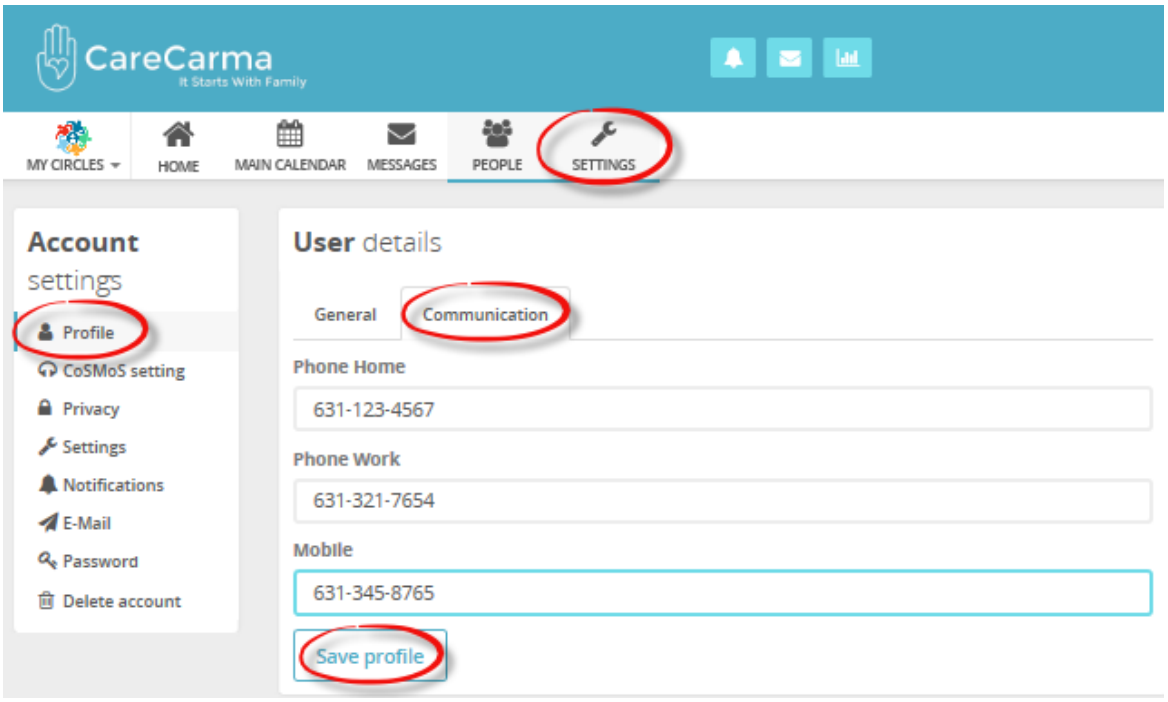



Select **(Profile)**
Select the **(General)** tab
Enter your **(First name)**
Enter you **(Last name)**
Optional: Enter information in the other fields

Note: In the (Privacy) section, you can select who can view your profile information

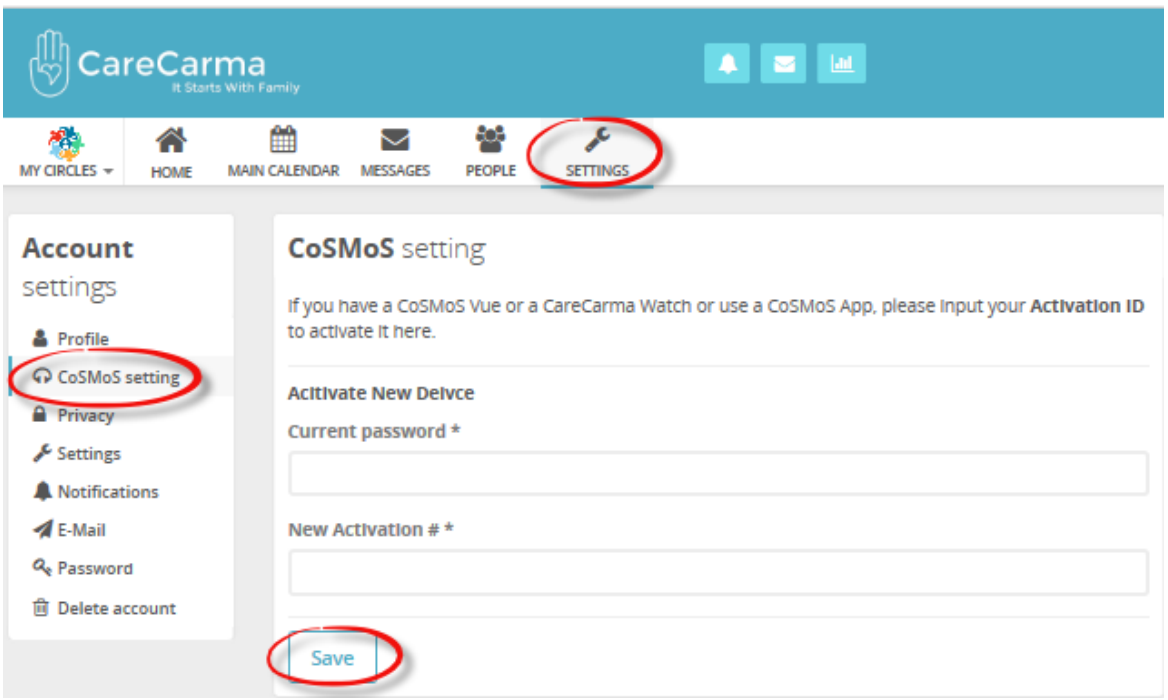
1. Your CareCircle members and Your People
2. All CareCarma members

Optional: **(Check)** the **(Hide year in profile)** if you don't want your CareCircle members to see your year of birth
Optional: **(Uncheck)** the **(Hide year in profile)** if you do want your CareCircle members to see your year of birth
Optional: Enter information in the **(About)** section
Select **(Save Profile)**



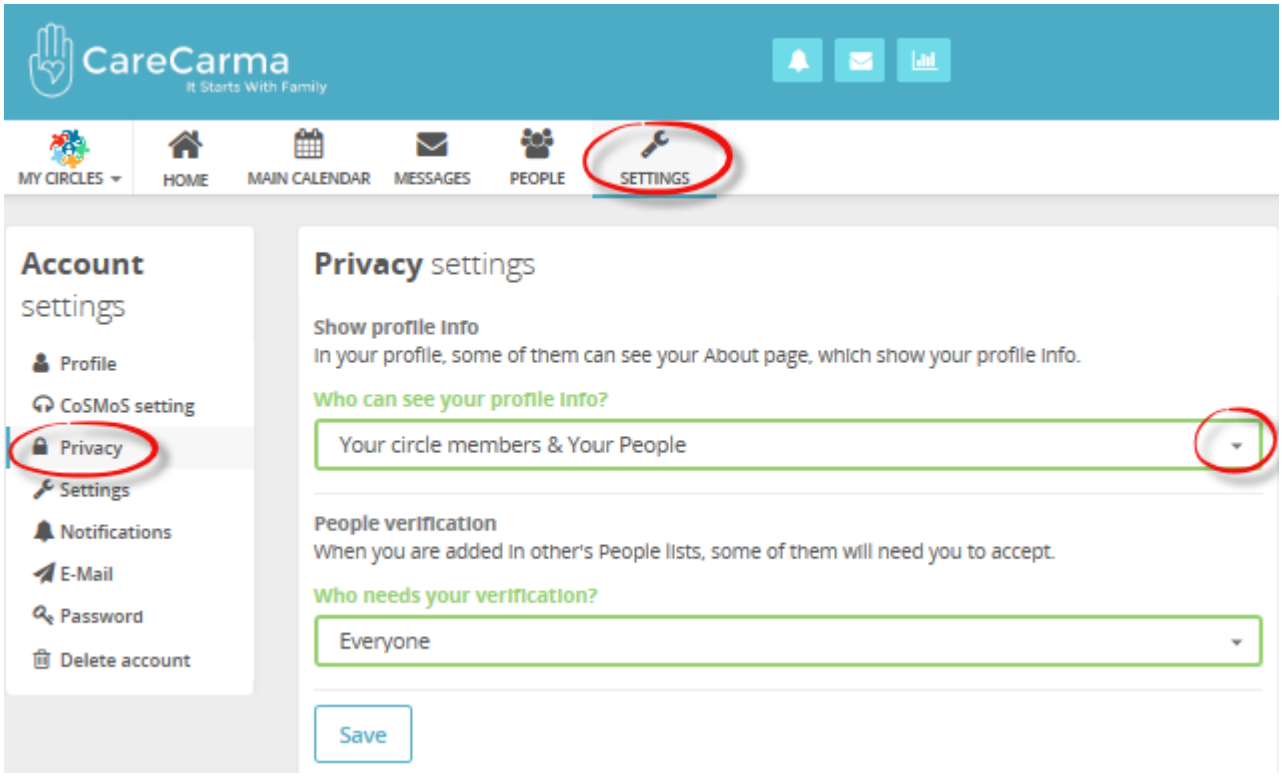

Select the **(Communication)** tab
Optional: Enter your **(home phone number)**
Optional: Enter your **(work phone number)**
Optional: Enter your **(mobile phone number)**
Select **(Save Profile)**

Menu Toolbar –Settings – CoSMoS setting

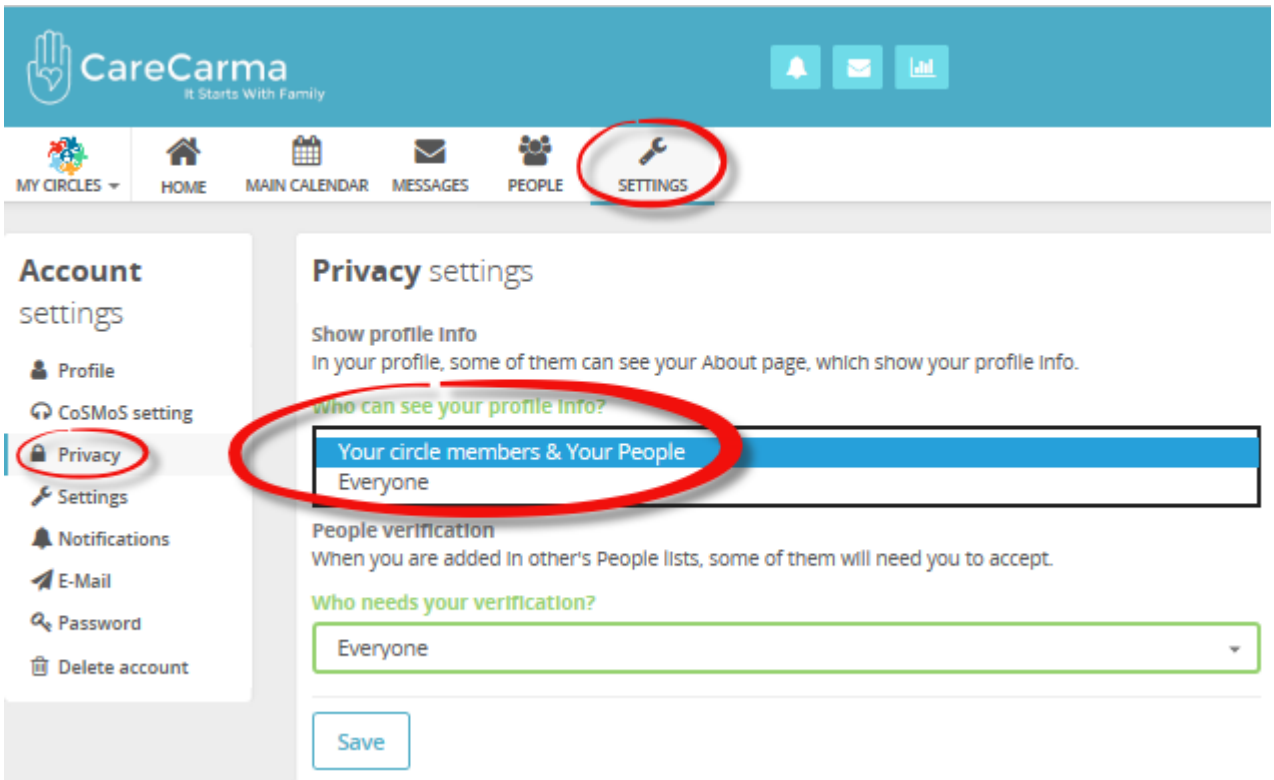



Select **(CoSMoS setting)** to activate CoSMoS devices or use the CoSMoS App
In the **(Current password)** section, enter your password – This is the same password that you entered to sign-up or log-in
In the (New Activation) section, enter the activation ID:
1. That came with the CoSMoS device
2. That was given to you when you installed the CoSMoS App on your phone
Select **(Save)**

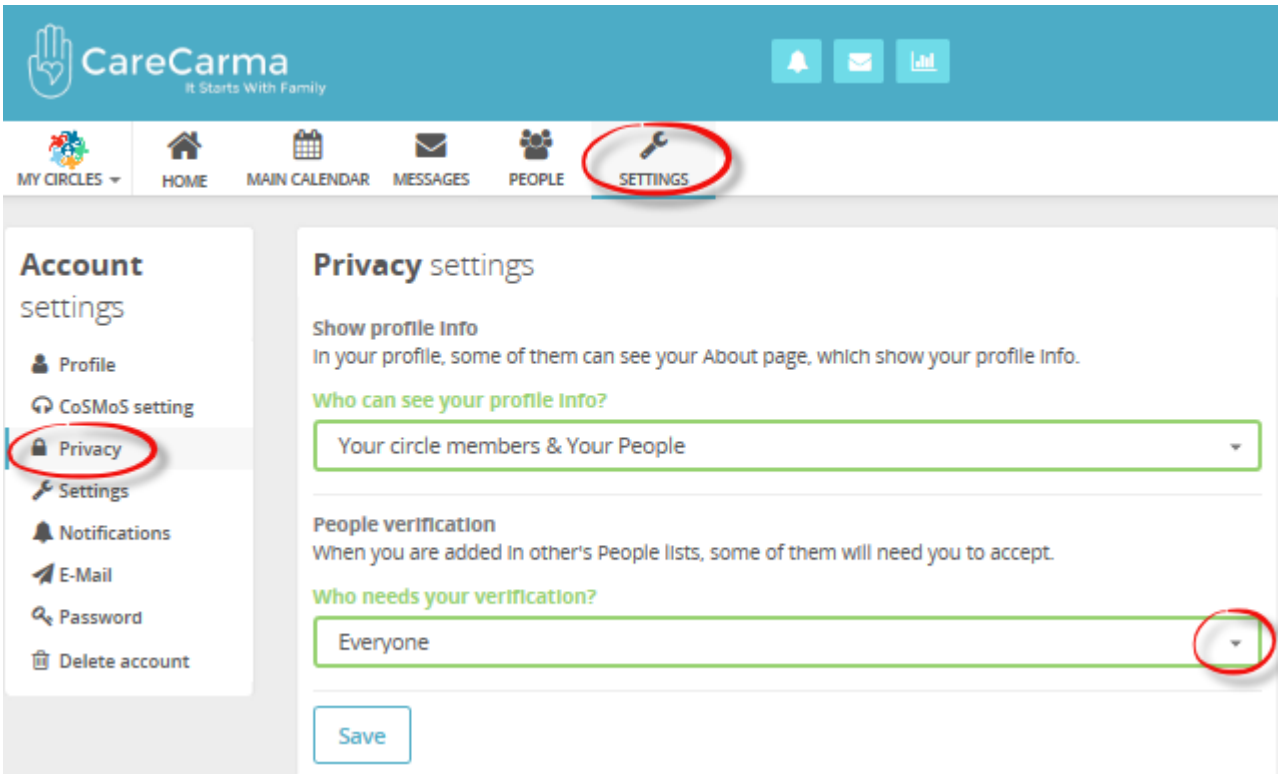
Menu Toolbar –Settings – Privacy



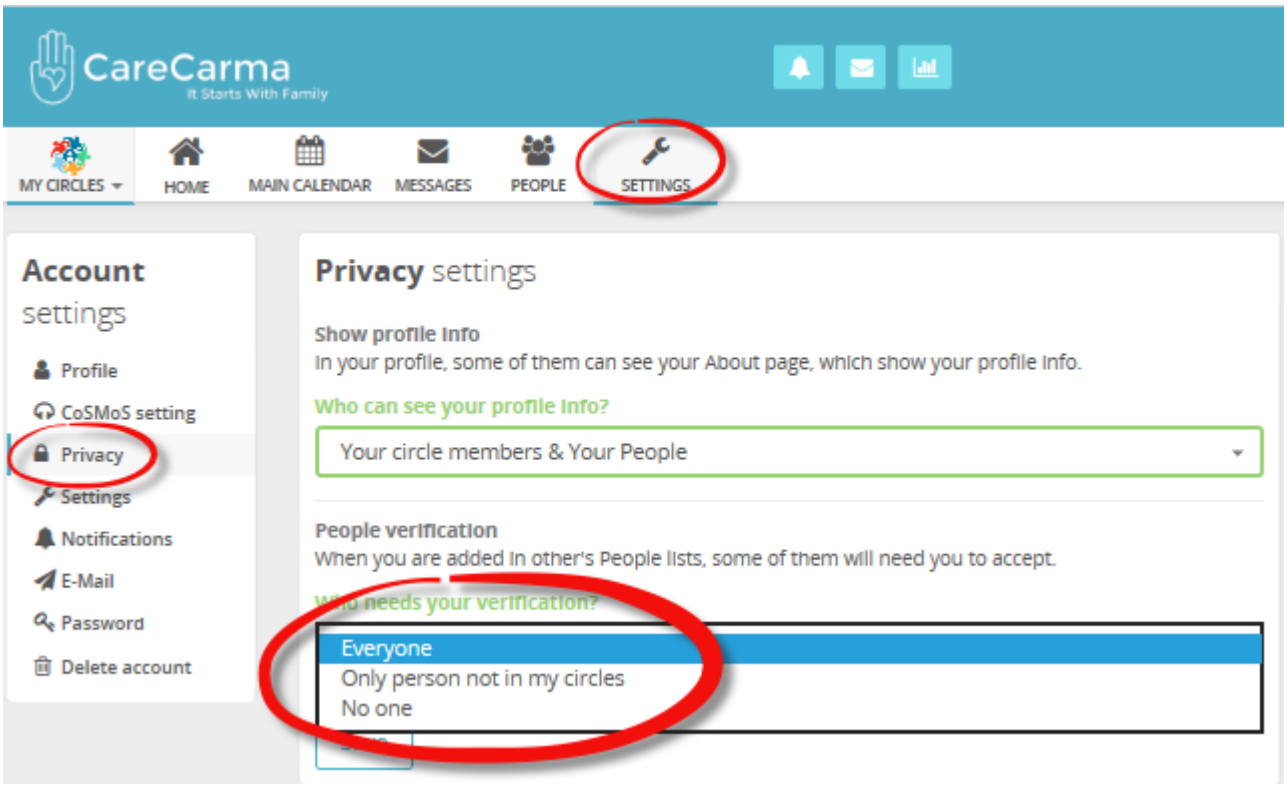

Select **(Privacy)** to:
1. Select who can see your profile information
2. Select who needs your verification when you are added to other people's lists



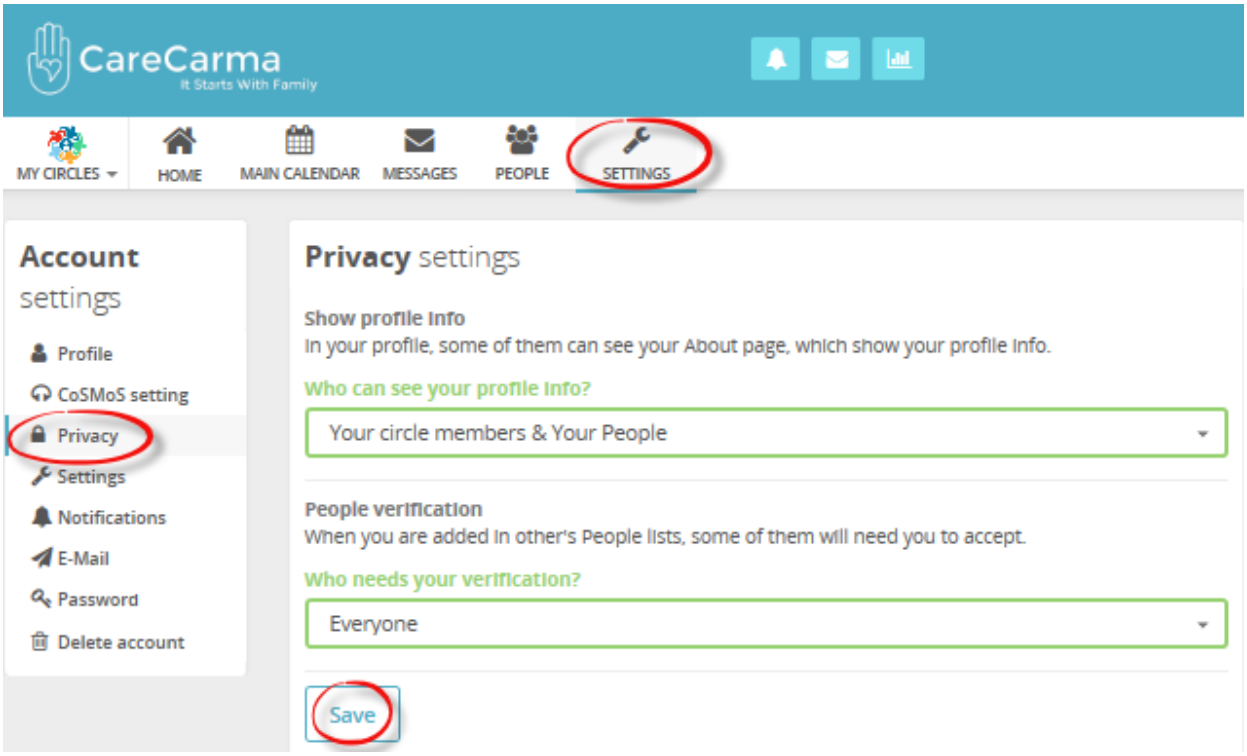

In the **(Who can see your profile info?)** section, select:
1. **(Your CareCircle members and Your People)** if you want only your CareCircle or Your People to view your profile information
2. **(Everyone)** if you want all CareCarma members to be able to view your profile information




In the **(Who needs your verification?)** section, select:




1. **(Everyone)** – to be added to other People's lists you will need to accept or decline all requests
2. **(Only person not in my circles)** – to be added to other People's lists you will need to accept or decline requests from people not listed in your CareCircle(s)
3. **(No one)** – you'll be automatically added to other people's lists every time a request is issued



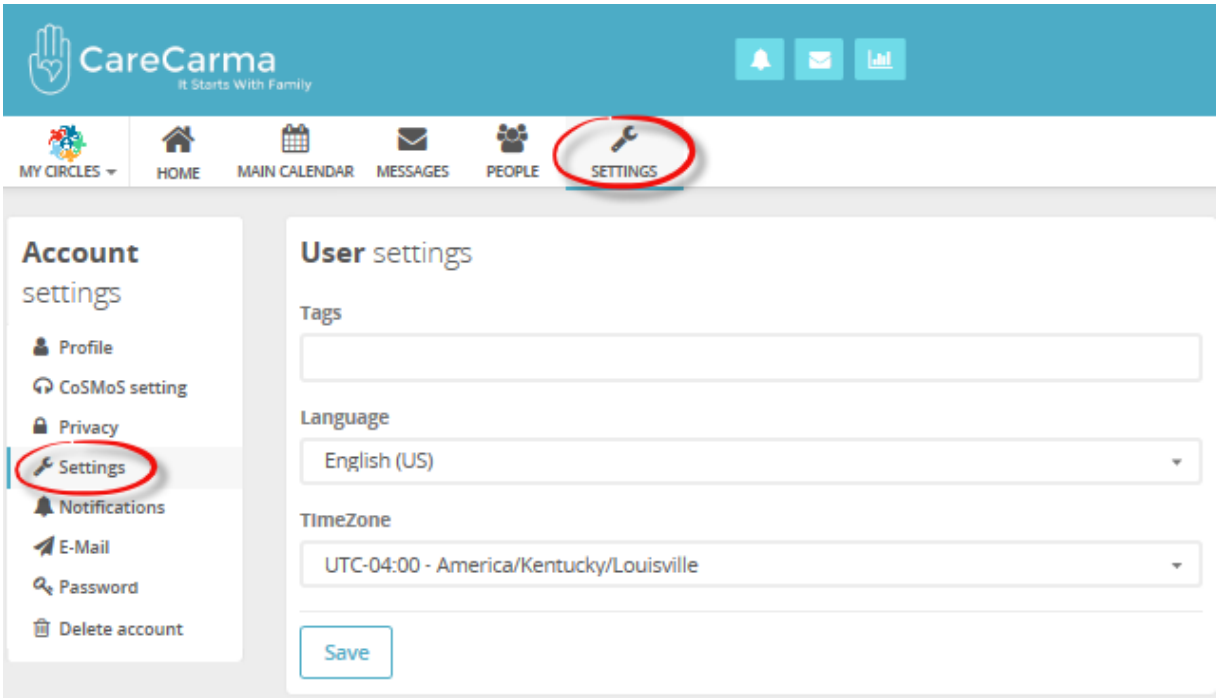

Select **(Save)**

Menu Toolbar –Settings – Settings

Select **(Settings)** to:

1. Add, edit or delete **(Tags)**
   A tag is a very brief description of yourself e.g. Circle Owner, Circle Creator, Supporter, Carer, Movie Star, Caterer
2. Select a **(Language)** from the drop-down list
3. Select a **(Time Zone)** from the drop-down list

Select **(Save)**

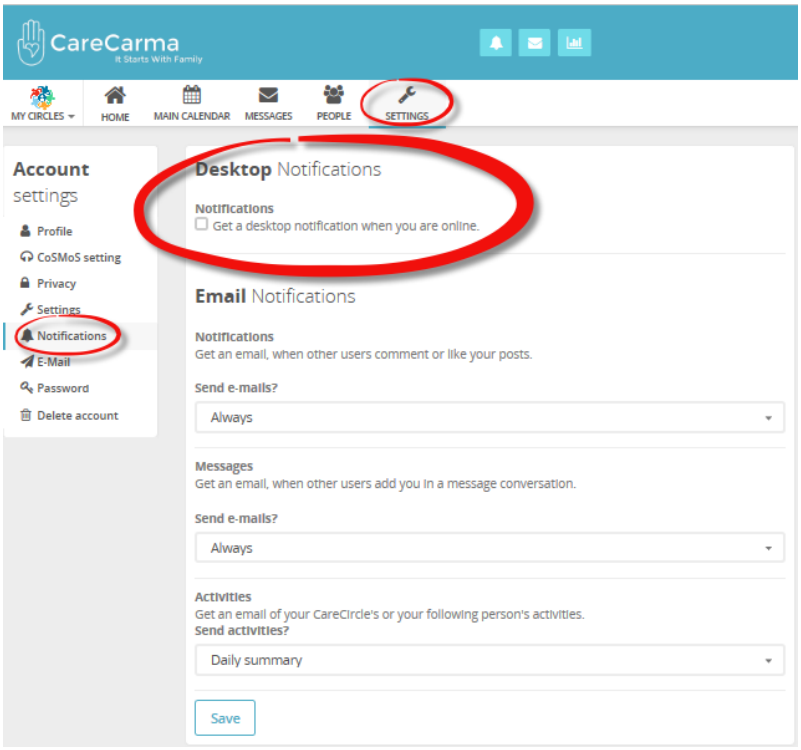



Menu Toolbar –Settings – Notifications

Select **(Notifications)** to access:

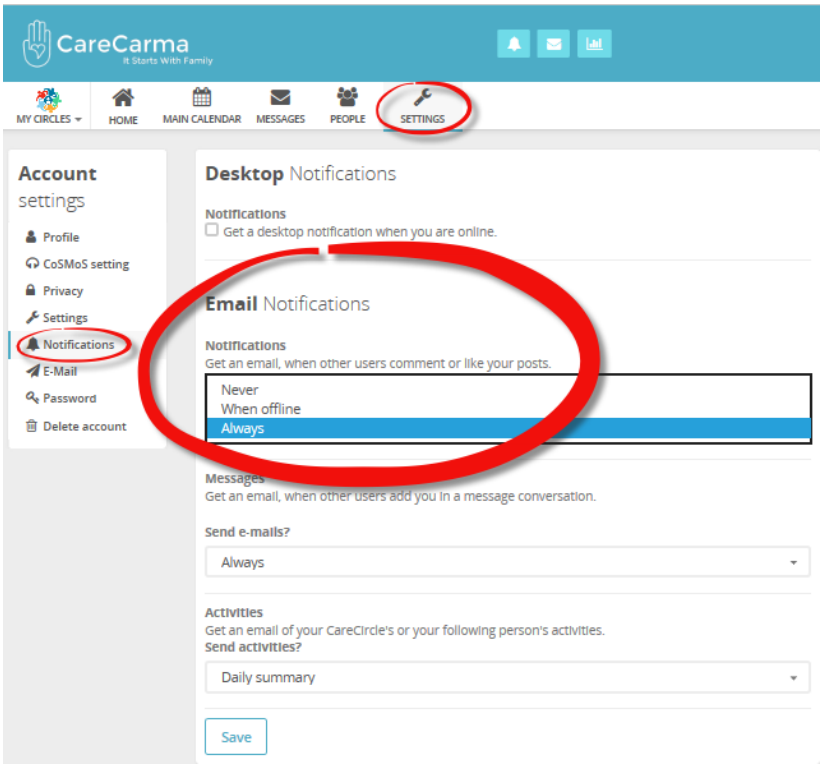
1. Desktop Notifications
2. Email Notifications

Menu Toolbar –Settings – Notifications – Desktop Notifications



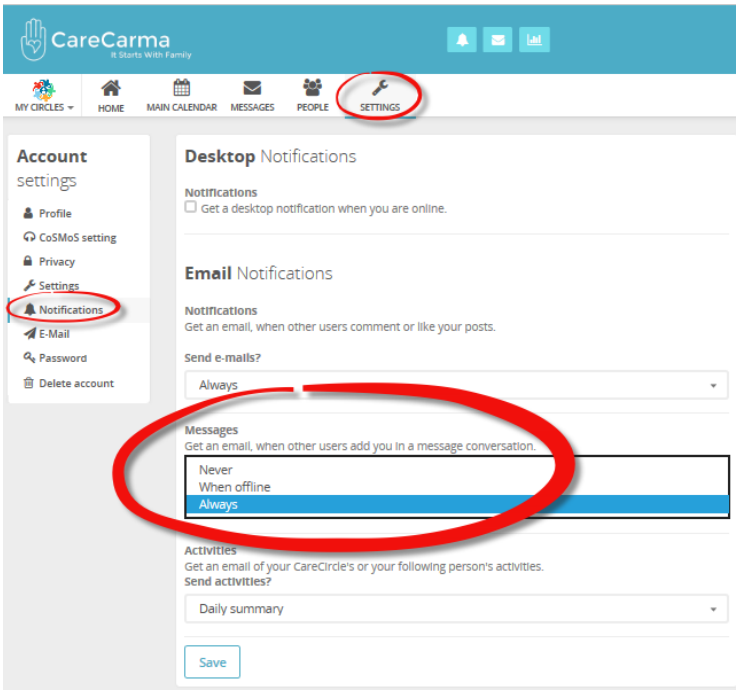

Check **(Get a desktop notification when you are online)** to receive notifications when you are using CareCarma
Uncheck **(Get a desktop notification when you are online)** to not receive notifications when you are using CareCarma

Menu Toolbar –Settings – Notifications – Email Notifications – Notifications



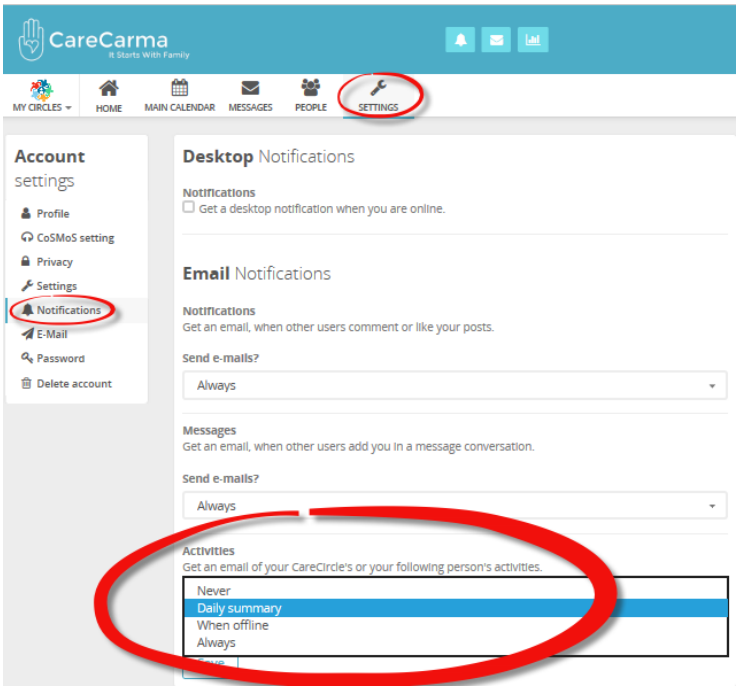

Select **(Never)** to never receive email notifications when other users comment or like your posts
Select **(When offline)** to receive email notifications when other users comment or like your posts when you're not using CareCarma
Select **(Always)** to always receive email notifications when other users comment or like your posts

Menu Toolbar –Settings – Notifications – Email Notifications – Messages




Select **(Never)** to never receive email notifications when other users add you in a message conversation
Select **(When offline)** to receive email notifications when other users add you in a message conversation when you're not using CareCarma
Select **(Always)** to always receive email notifications when other users add you in a message conversation

Menu Toolbar –Settings – Notifications – Email Notifications – Activities



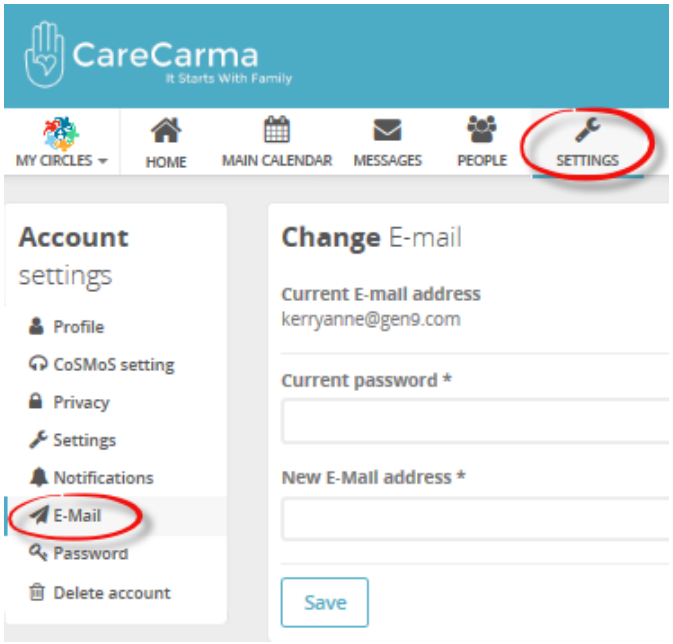

Select **(Never)** to never receive email notifications of your CareCircle members or Your People's activities
Select **(Daily summary)** to receive daily email notifications of your CareCircle members or Your People's activities
Select **(When offline)** to receive email notifications of your CareCircle members or Your People's activities when you're not using CareCarma
Select **(Always)** to always receive email notifications of your CareCircle members or Your People's activities

Select **(Save)** after all your desktop and email preferences are selected

Menu Toolbar –Settings – E-Mail

Select **(E-Mail)**:

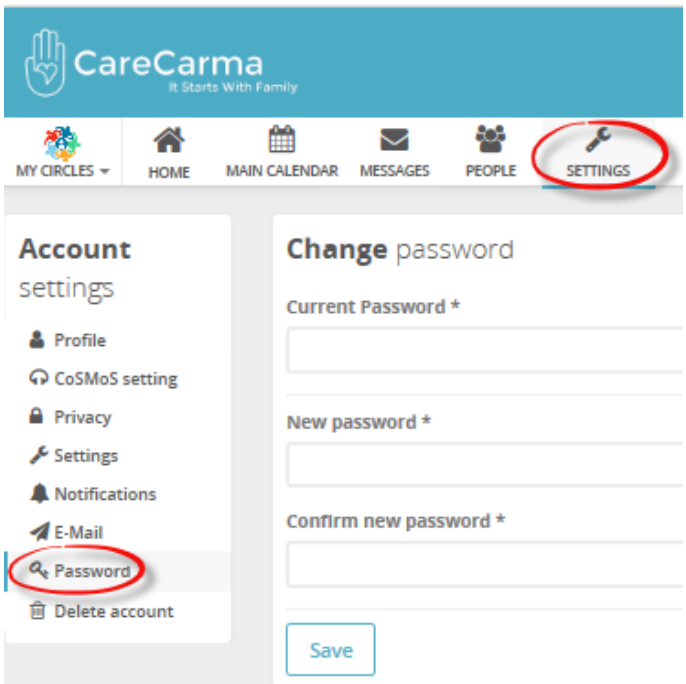
1. To view your current email address that is on file in CareCarma
   The current email address on file in CareCarma is listed under the heading **(Current E-mail address)**
2. To change your email address




In the **(Current password)** section, enter your password – This is the same password that you entered to sign-up or log-in
In the **(New E-Mail address)** section, enter a new email address
Select **(Save)**

Menu Toolbar –Settings – Password

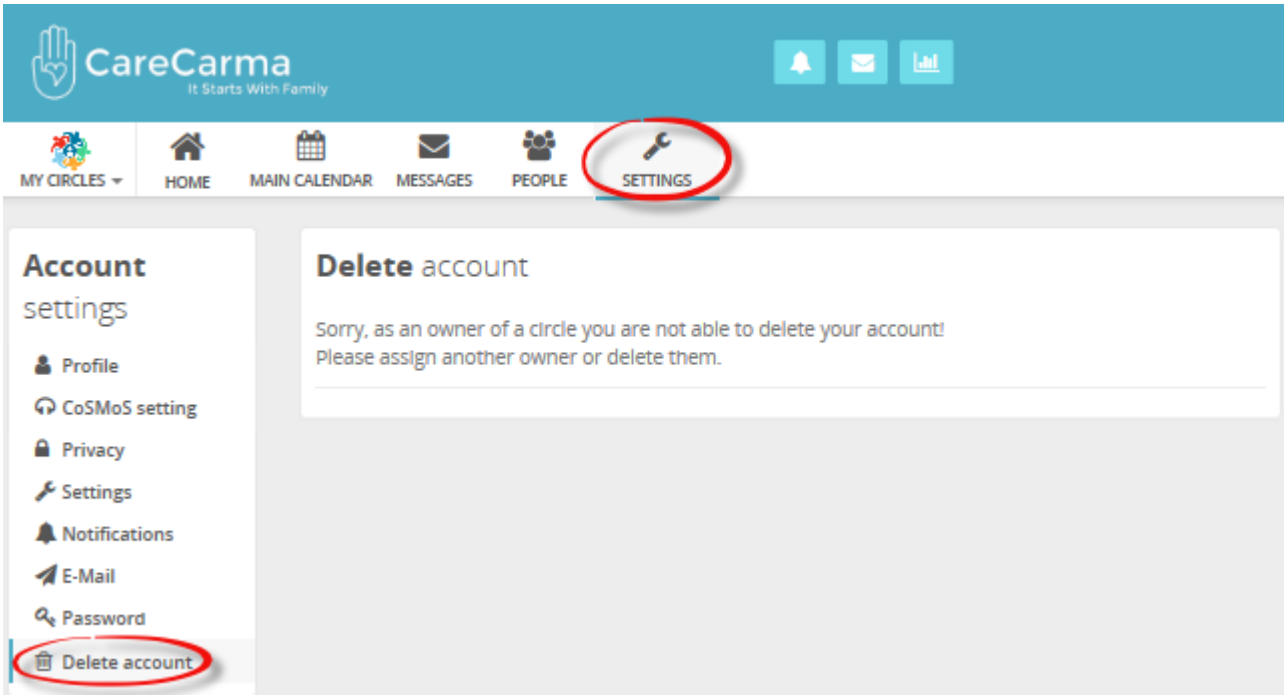
Select **(Password)** to change your password




In the **(Current password)** section, enter your password – This is the same password that you entered to sign-up or log-in
In the **(New password)** section, enter a new password
In the **(Confirm new password)** section, enter the same new password again
Select **(Save)**

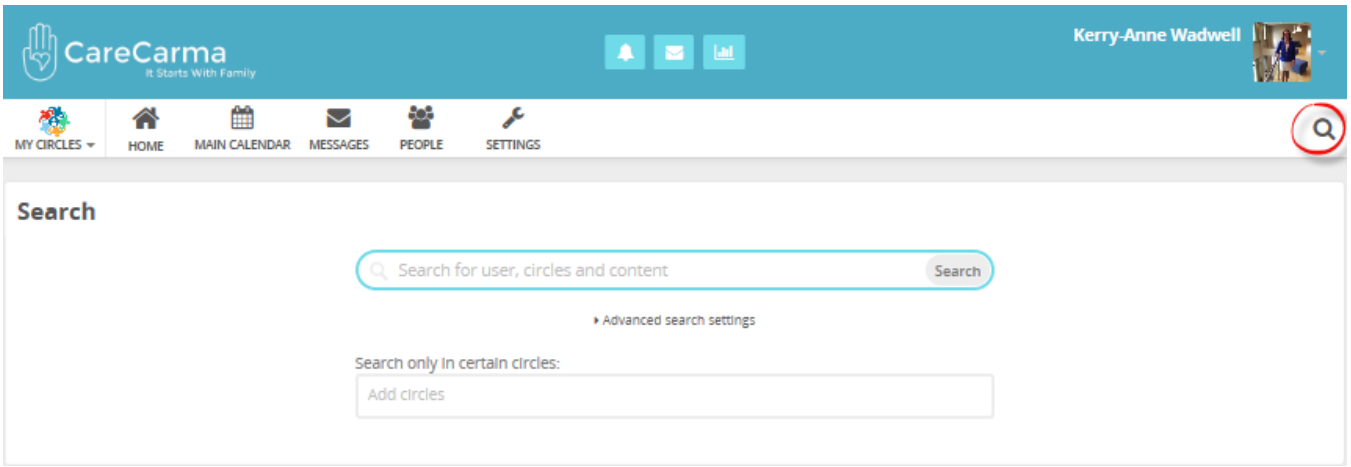
Menu Toolbar –Settings – Delete Account

Select **(Delete account)** to remove your account from CareCarma




Note: If you are the owner of a CareCircle you will need to either assign another owner to your CareCircle(s) or delete the CareCircle(s) before you can delete your account from CareCarma

Menu Toolbar – 🔍 (Search)




Select the **(🔍)** icon to open the search page

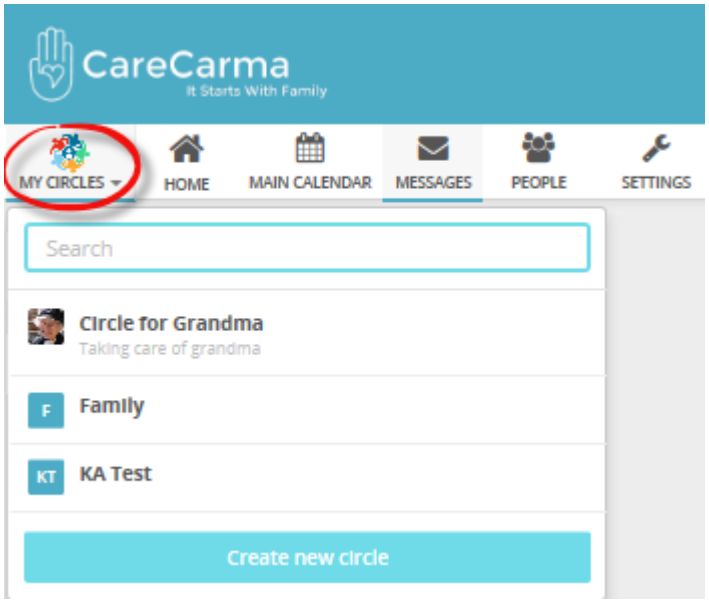
Enter the name of a user, circle, or other content you want to search for

Optional: Enter a CareCircle name in the (Search only in certain circles) section

Select **(Search)**

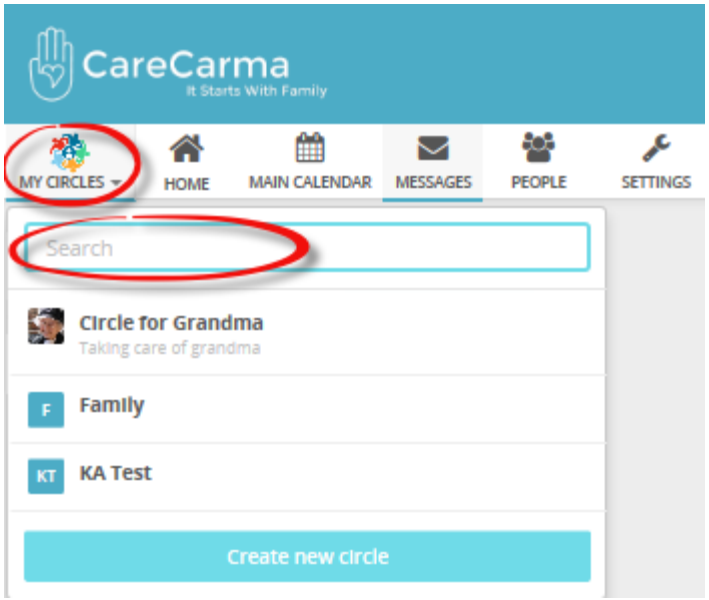
# CARECIRCLE FUNCTIONS AND TOOLS

Menu Toolbar – My Circles



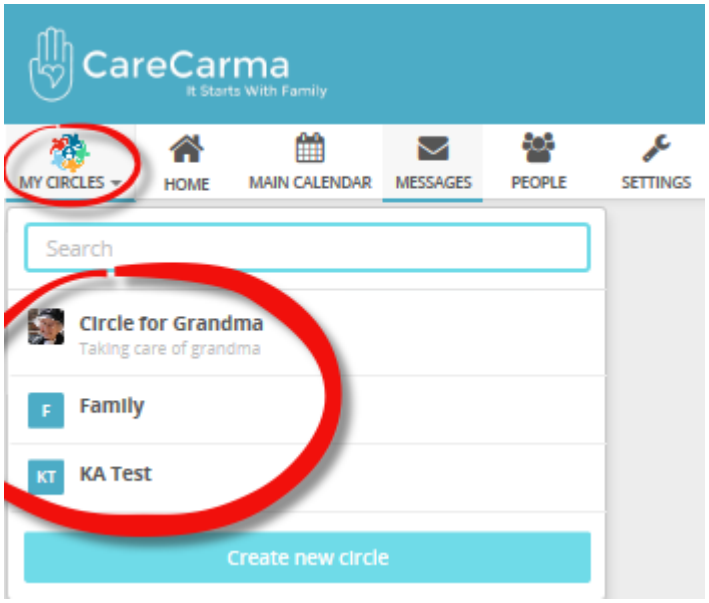

Select the **(My Circles)** icon to:
1. Search for publicly visible CareCircles which you are not a current member
2. Access CareCircles for which you are a member
3. Create new CareCircles

Menu Toolbar – My Circles – Search



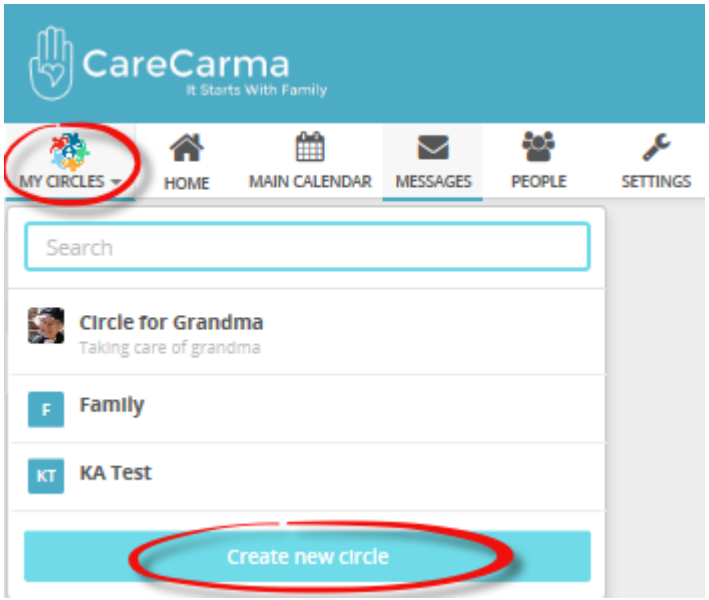

To search for publicly visible CareCircles, that is, CareCircles for which you are not a member:
In the **(search)** section, enter a search description then select enter

Menu Toolbar – My Circles – Access CareCircles

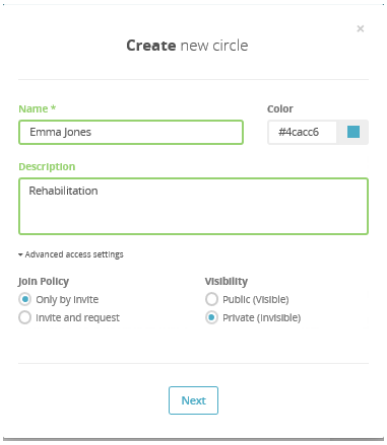



To access CareCircles for which you are a member:
Select the CareCircle you want to access from the list of CareCircles
After selection:
1. A picture of the Care Receiver for the CareCircle you've selected will replace the My Circles Icon
2. You'll be redirected to the CareCircle you selected

Menu Toolbar – My Circles –Create New CareCircle




To create a new CareCircle:
Select **(Create new circle)** to access the (Create new circle) pop-up




In the **(Name)** section, enter a name for the CareCircle, e.g. Grandma Ellis, John Brown, Smith Family
Optional: In the **(Color)** section, choose a color
Optional: In the **(Description)** section, enter a brief description of the CareCircle
Optional: Select Advanced Access Settings
In the **(Join Policy)** section, select **(Only by invite)**:

To allow any CareCircle member to invite another CareCarma member to this CareCircle
To automatically send a notification request to the invited CareCarma member

In the **(Join Policy)** section, select **(Invite and Request)**:

To allow any CareCircle member to invite another CareCarma member to this CareCircle
To automatically send a notification request to the invited CarCarma member
To allow any CareCarma member to request to be a member of this CareCircle

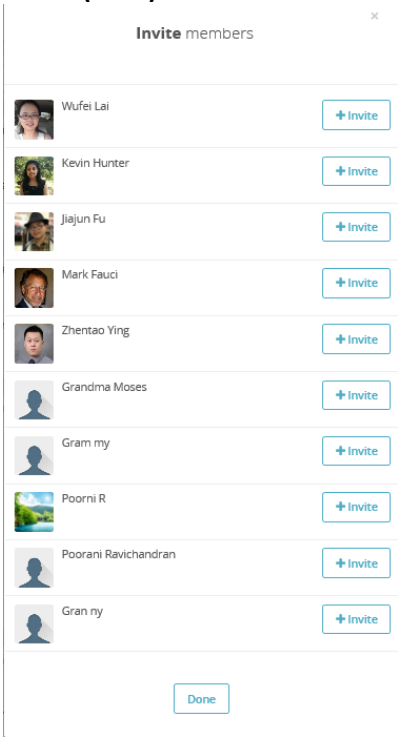
In the **(Visibility)** section, select **(Public (Visible))** to allow all CareCarma members visibility to this CareCircle

This CareCircle is **(Visible)** to all CareCarma members including this CareCircle's members

In the **(Visibility)** section, select **(Private(Invisible))** to allow only this CareCircles members visibility

This CareCircle is **(Invisible)** to CareCarma members who are not members of this CareCircle
CareCircle members have the option to change their new posts visibility to public before posting

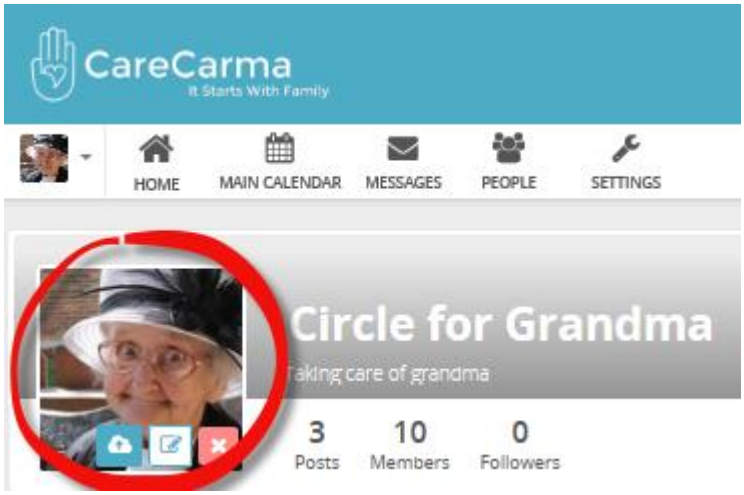
Select **(Next)**




When the **(Invite members)** pop-up appears select the **(+ Invite)** adjacent the member you want to invite
Note: If people you want to be in this CareCircle are not listed you need to first invite them to be CareCarma members. Refer to Home Page – Menu Toolbar – People – Add people for instructions on how to do this.
When you have finished inviting members, select **(Done)**

CareCircle Toolbar – Picture

This is a picture of the Care Receiver




To upload a different picture:

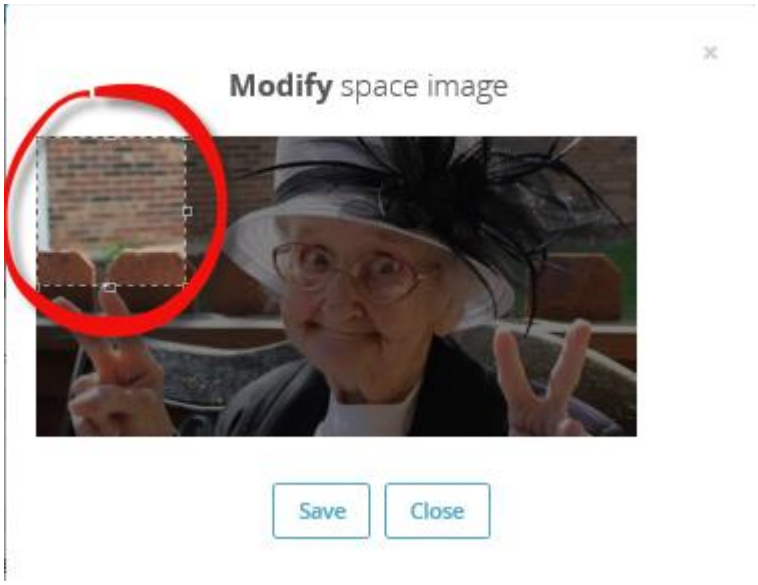
Hover the mouse icon over the picture and select the (upload image) icon

Locate the picture you want

Select (open)

To modify the picture:

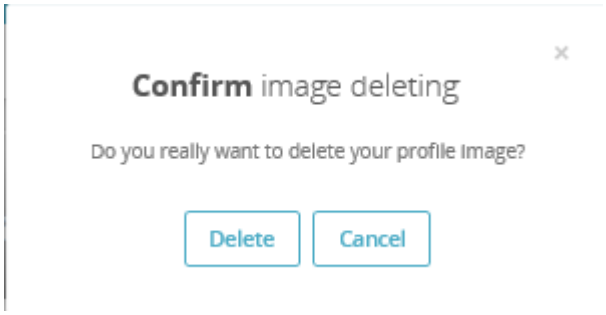
Hover the mouse icon over the picture and select the (modify image) icon to open the (Modify space image) pop-up




Adjust the modification box to modify the picture
Select **(Save)** to change the picture
Select **(Close)** to NOT change the picture

To delete the picture:

Hover the mouse icon over the picture and select the (delete image) icon to open the (Confirm image deleting) pop-up




Select **(Delete)** to delete the profile image
Select **(Cancel)** to NOT delete the profile image

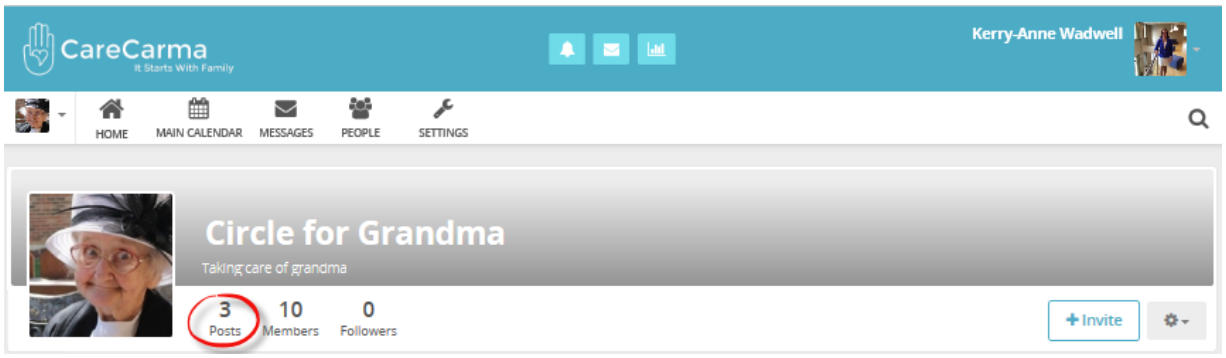
CareCircle Toolbar – Name

This is the name of the CareCircle

Optional: If a description was included when the CareCircle was created it will appear below the name

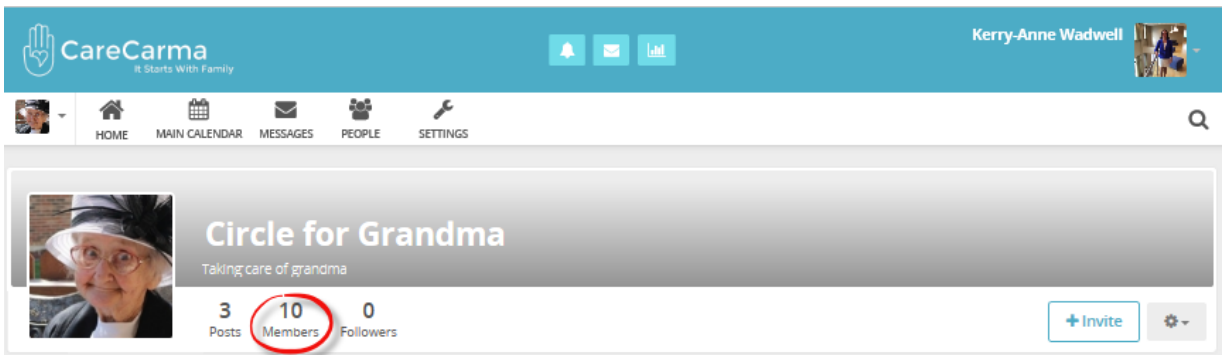
CareCircle Toolbar – Posts

The number of posts to this CareCircle



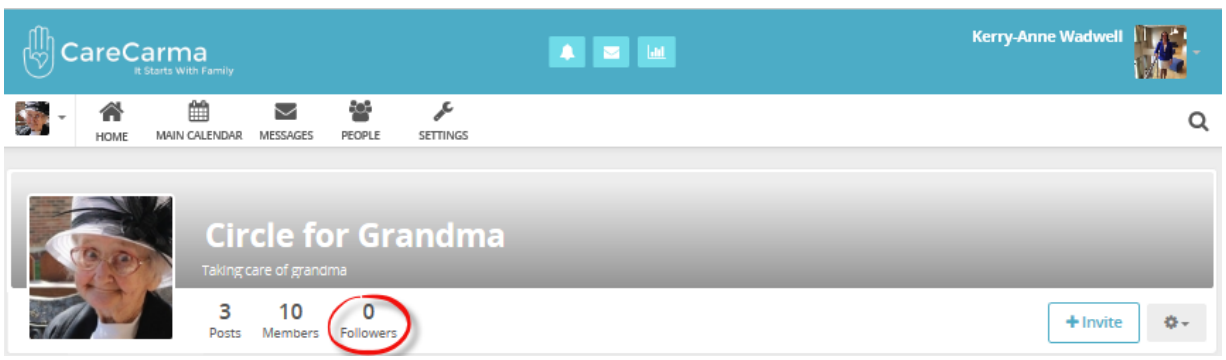

CareCircle Toolbar – Members

The number of members in this CareCircle

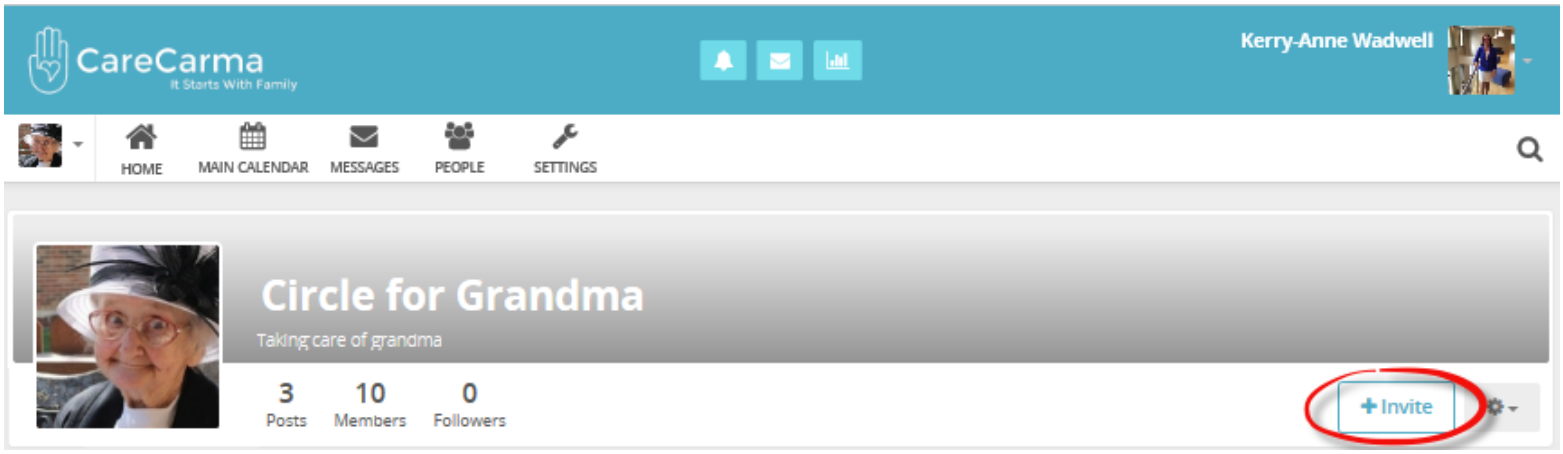



CareCircle Toolbar – Followers

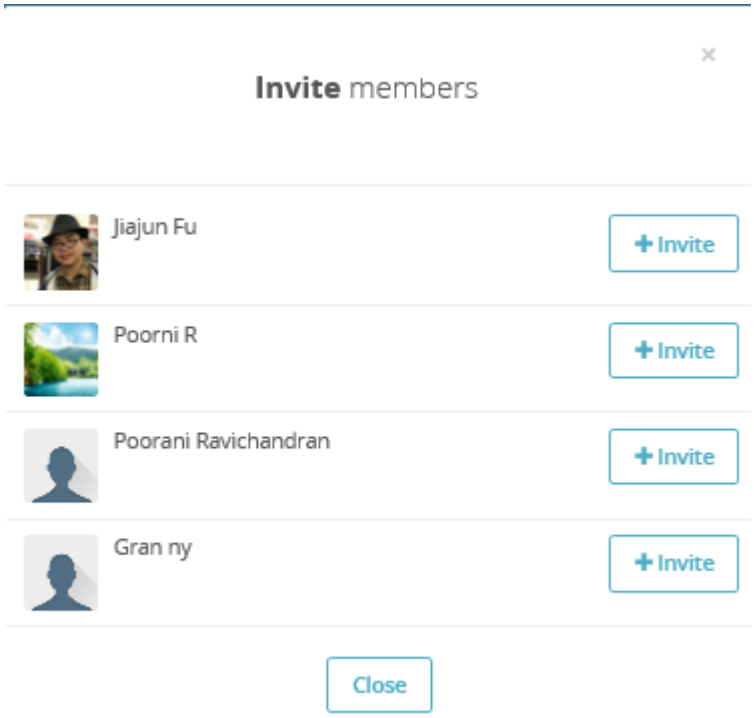
The number of followers of this CareCircle



CareCircle Toolbar – (+ Invite)

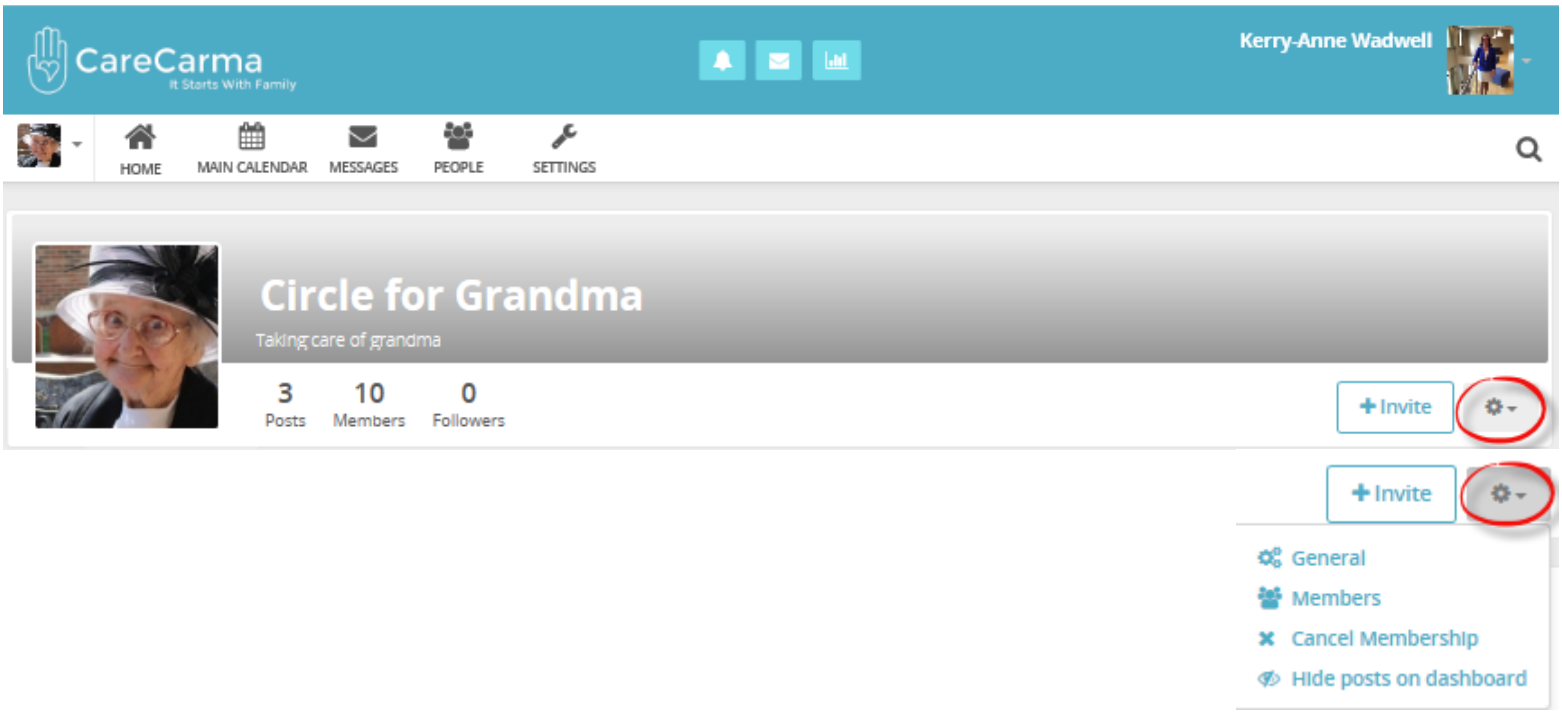



To invite CareCarma members to join a CareCircle
Select **(+ Invite)** to open the (Invite members) pop-up




Select the **(+ Invite)** adjacent the member you want to invite
When you have finished inviting members, select **(Close)**
Note: If the invitee is not yet a CareCarma member, invite them to join CareCarma first (See Menu Toolbar –People –Add People)

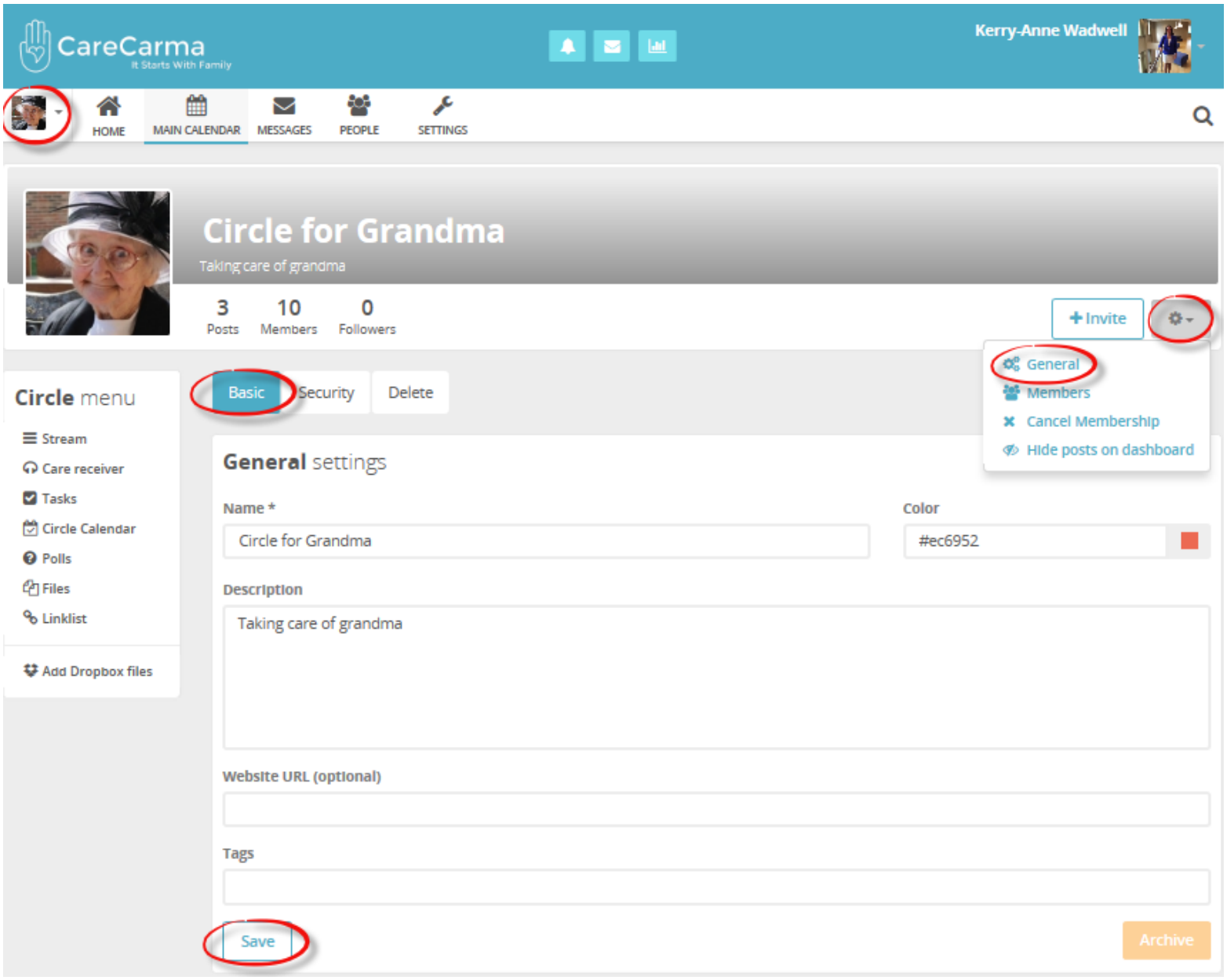
CareCircle Toolbar – ⚙ (Gear Icon)




Select the (Gear Icon) to access:

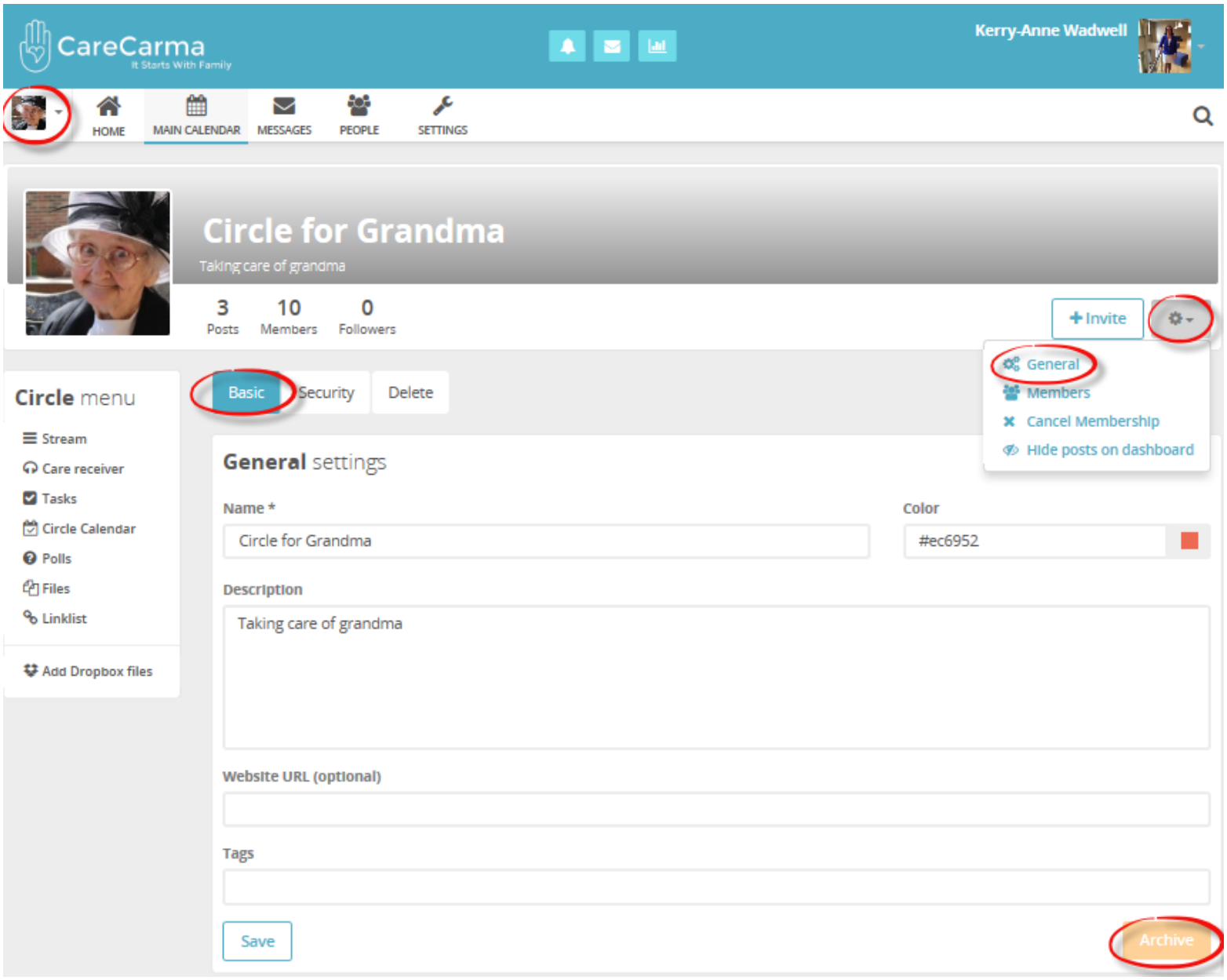
1. General Settings – CareCircle Creator (Owner) only
    - 1A. Basic
    - 1B. Security
    - 1C. Delete
2. Members – CareCircle Creator (Owner) only
    - 2A. Manage members
    - 2B. Pending Invites
    - 2C. Pending approvals
    - 2D. Manage permissions
3. Cancel Membership
4. Hide posts on dashboard

CareCircle Toolbar – ⚙ (Gear Icon) – General Settings – Basic



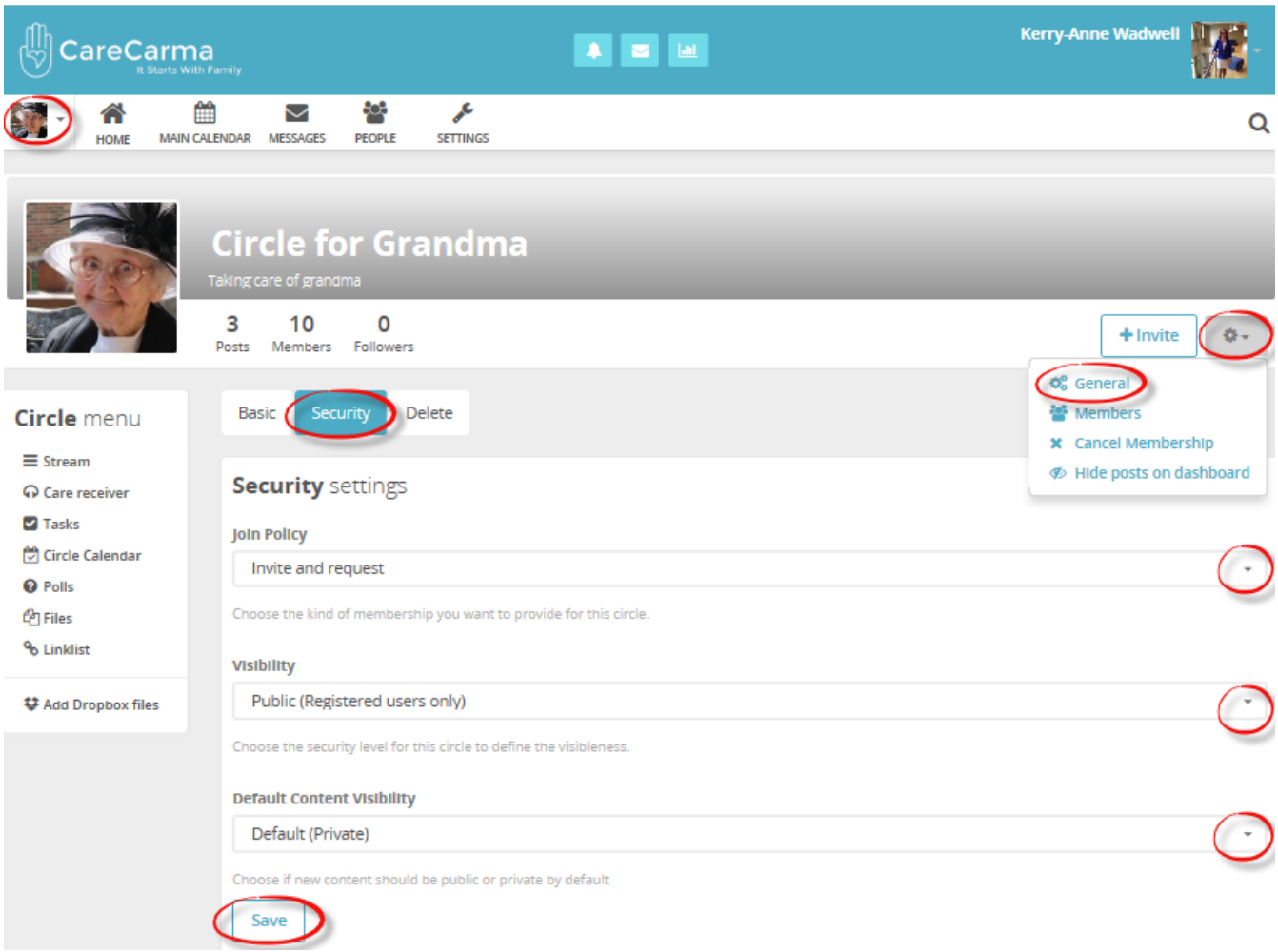

Only the CareCircle Creator (Owner) can access this function
Select the **(Gear Icon)**
Select **(General)**
Select **(Basic)**
In the **(Name)** section, enter a name for the CareCircle e.g. Grandma Ellis, John Brown, Smith Family
Optional: In the **(Color)** section, choose a color
Optional: In the **(Description)** section, enter a brief description of the CareCircle
Optional: In the **(Website URL)** section, enter the URL address
Optional: In the **(Tags)** section, include a brief description of yourself e.g. Circle Owner, Circle Creator, Supporter, Carer, Caterer
Select **(Save)**

CareCircle Toolbar – ⚙ (Gear Icon) – General Settings – Basic – Archive



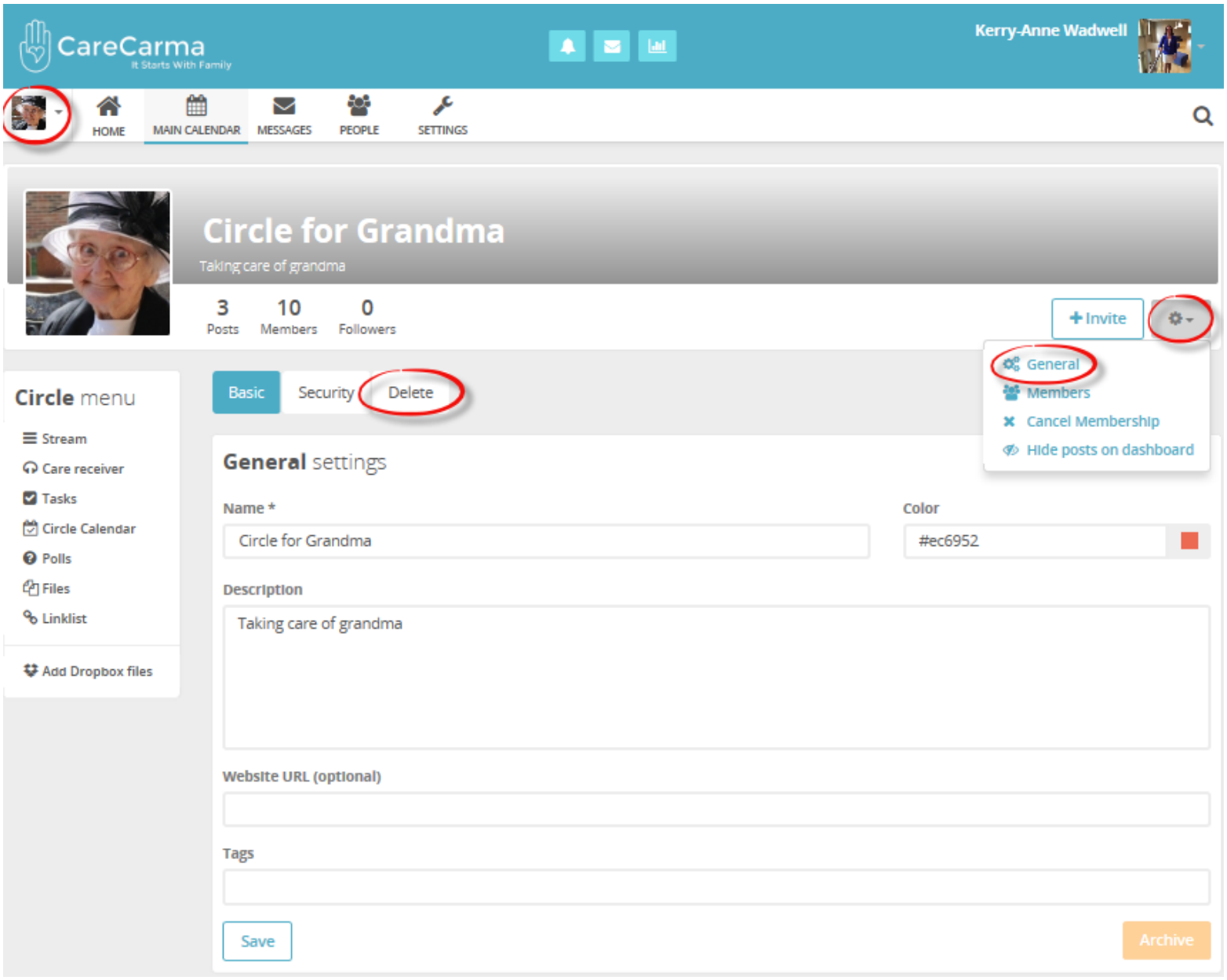

Only the CareCircle Creator (Owner) can access this function
Select the **(Gear Icon)**
Select **(General)**
Select **(Basic)**
Select **(Archive)** when a CareCircle no longer needs to be currently active
Archived CareCircles retain all the CareCircles published content ready for use again in the future, if required
Once a CareCircle is archived, new data or posts CANNOT be added to the CareCircle

CareCircle Toolbar – ⚙ (Gear Icon) – General Settings – Security




Only the CareCircle Creator (Owner) can access this function
Select the **(Gear Icon)**
Select **(General)**
Select **(Security)**
In the **(Join Policy)** section, select **(Only by invite)**:
To allow any CareCircle member to invite another CareCarma member to this CareCircle
To automatically send a notification request to the invited CareCarma member
In the **(Join Policy)** section, select **(Invite and Request)**:
To allow any CareCircle member to invite another CareCarma member to this CareCircle
To automatically send a notification request to the invited CarCarma member
To allow any CareCarma member to request to be a member of this CareCircle
In the **(Join Policy)** section, select **(Everyone can enter):**
To allow any CareCarma member to automatically join this CareCircle without an invitation or request
Note: The CareCircle creator or members will not receive notification of a new member
Note: All CareCircle members will see the new member listed on the Circle (Members) page
In the **(Visibility)** section, select **Private(Invisible)** to allow only this CareCircles members visibility
This CareCircle is **(Invisible)** to CareCarma members who are not members of this CareCircle
In the **(Visibility)** section, select **Public (Registered users only)** to allow all CareCarma members visibility to this CareCircle
This CareCircle is **(Visible)** to all CareCarma members including this CareCircle's members
In the **(Default Content Visibility)** section, select **Default (Private)** or **(Private)** if new content should be private
New content added to this CareCircle is invisible to CareCarma members who are not members of this CareCircle
CareCircle members have the option to change their new posts visibility to public before posting
In the **(Default Content Visibility)** section, select **(Public)** if new content should be public
New content added to this CareCircle is visible to all CareCarma members including this CareCircle's members
Select **(Save)**

CareCircle Toolbar – ⚙ (Gear Icon) – General Settings – Delete

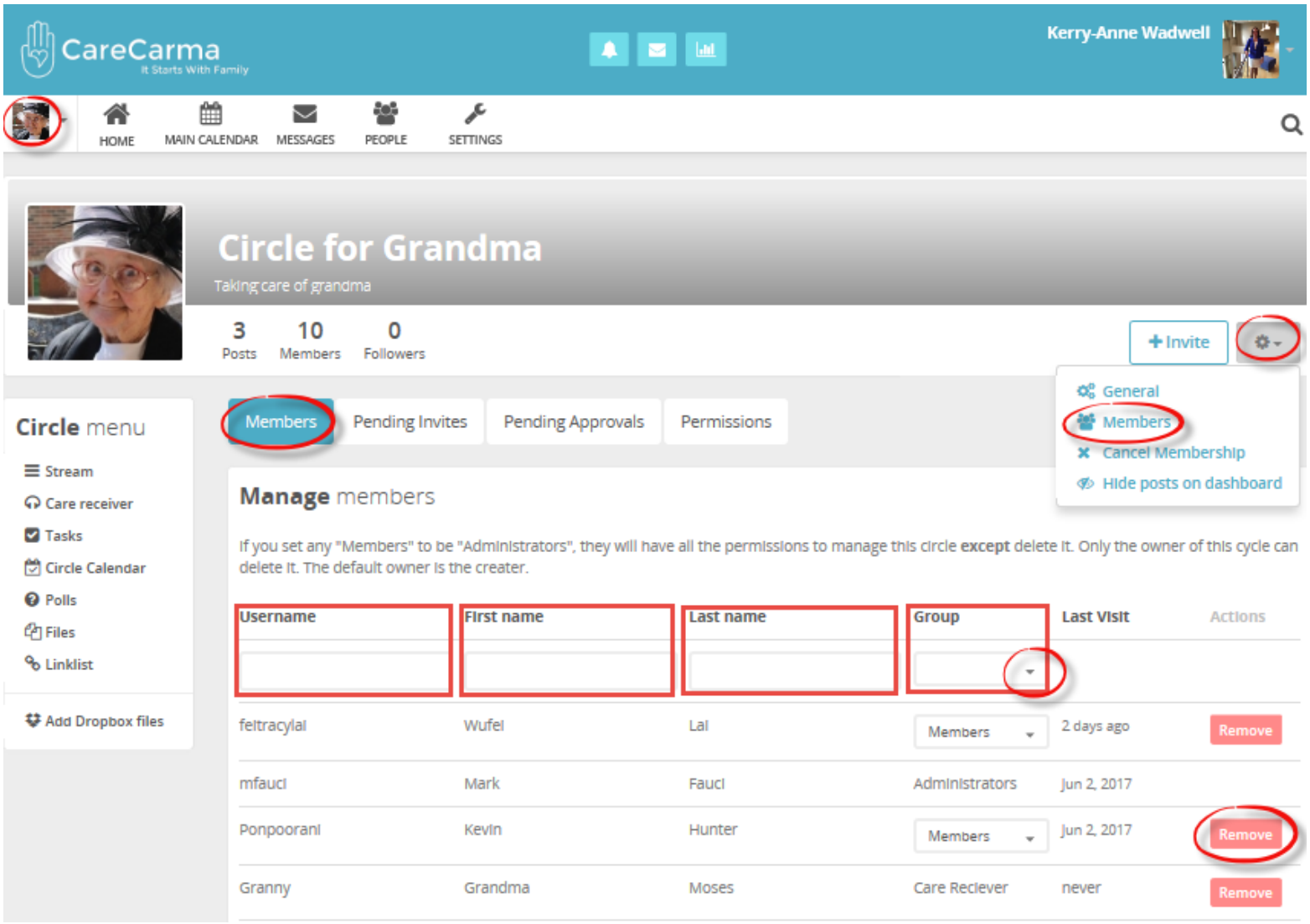



Only the CareCircle Creator (Owner) can access this function
Select the **(Gear Icon)**
Select **(General)**
Select **(Delete)** to access the **(Delete circle)** pop-up which will ask:
"Are you sure you want to delete this circle. All published content will be removed! Please provide your password to continue!"
If you DON'T want to permanently delete the CareCircle:

You can (Archive) the CareCircle which makes the CareCircle inactive but retains the CareCircles published content

If you want to permanently delete the CareCircle:
In the **(Password)** section, enter your password – This is the same password that you entered to sign-up or log-in
Select **(Delete)**

CareCircle Toolbar – ⚙ (Gear Icon) – Members

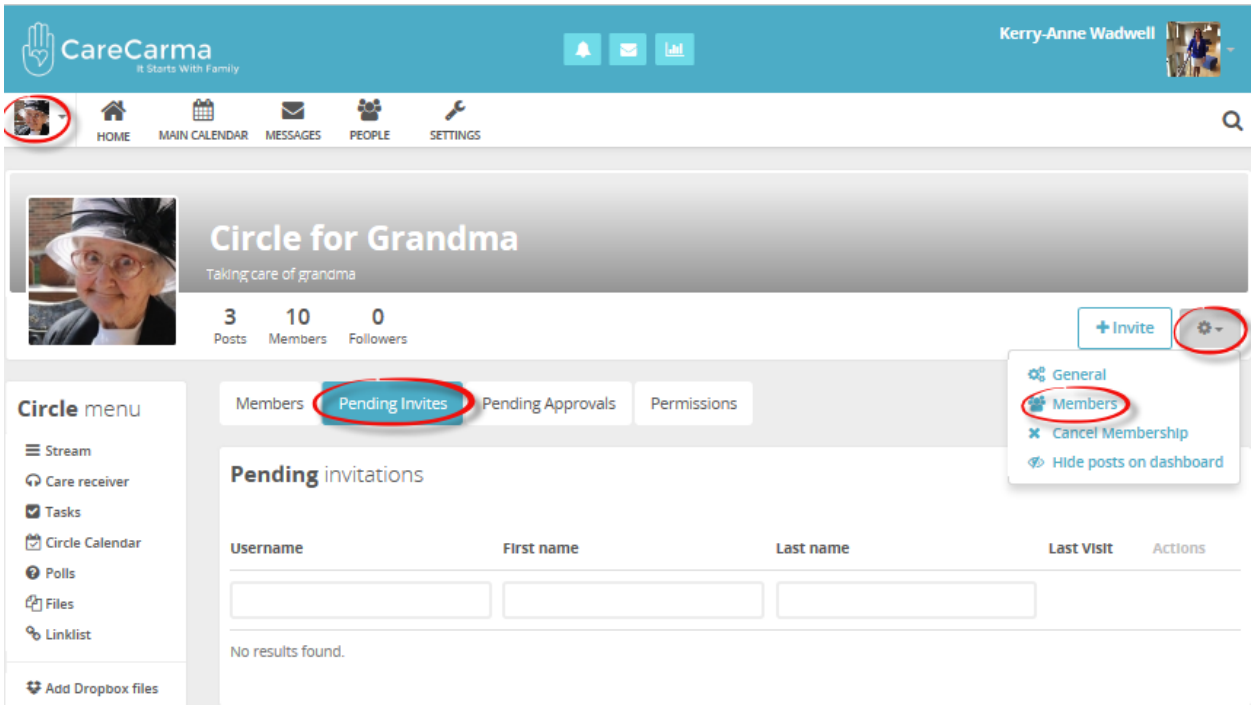



Only the CareCircle Creator (Owner) can access this function
Select the **(Gear Icon)**
Select **(Members)** to open the (Manage members) page

To add a new member:
Enter the members **(Username)**
Enter the members **(First Name)**
Enter the members **(Last Name)**
Select the **(Drop-Down Arrow)** under the heading **(Group)** then select the group you want this member to have access to
Note: If you only manage one group, then only one group will be available to select

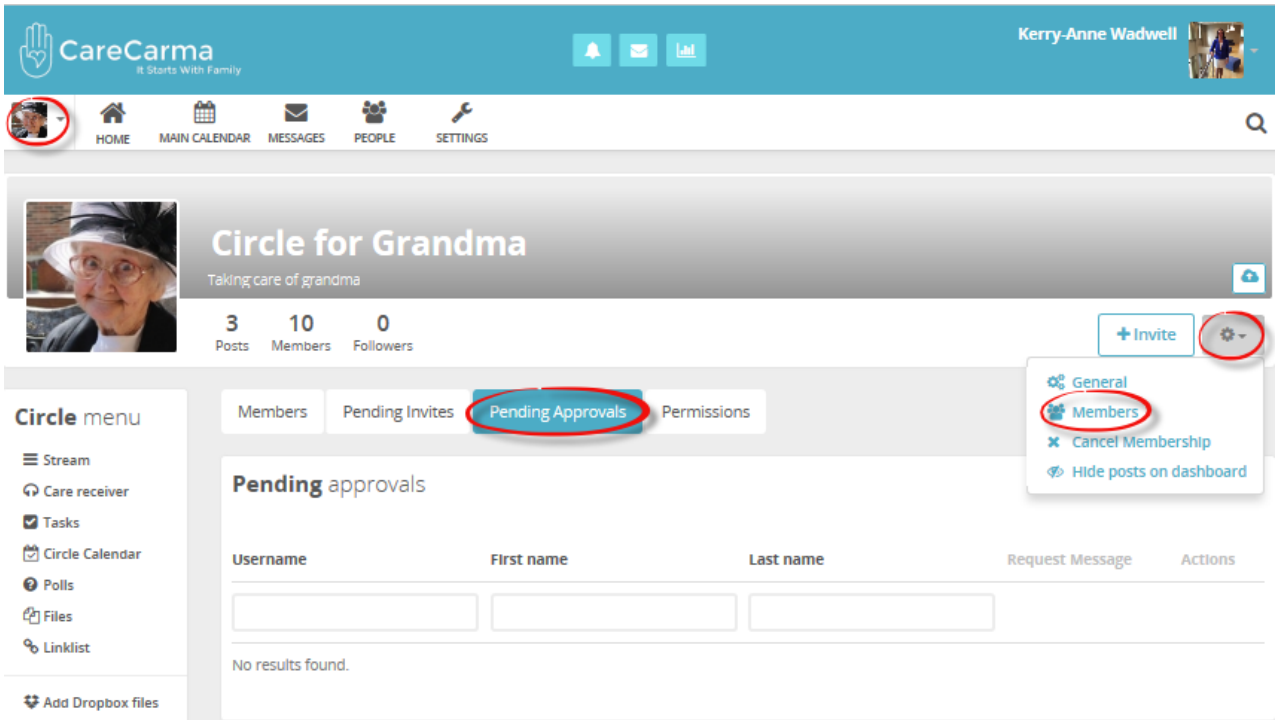
To delete a member:
On the (Manage members) page locate the person you want to delete
Select the **(Remove)** action adjacent this person's name

CareCircle Toolbar – ⚙ (Gear Icon) – Members – Pending Invites



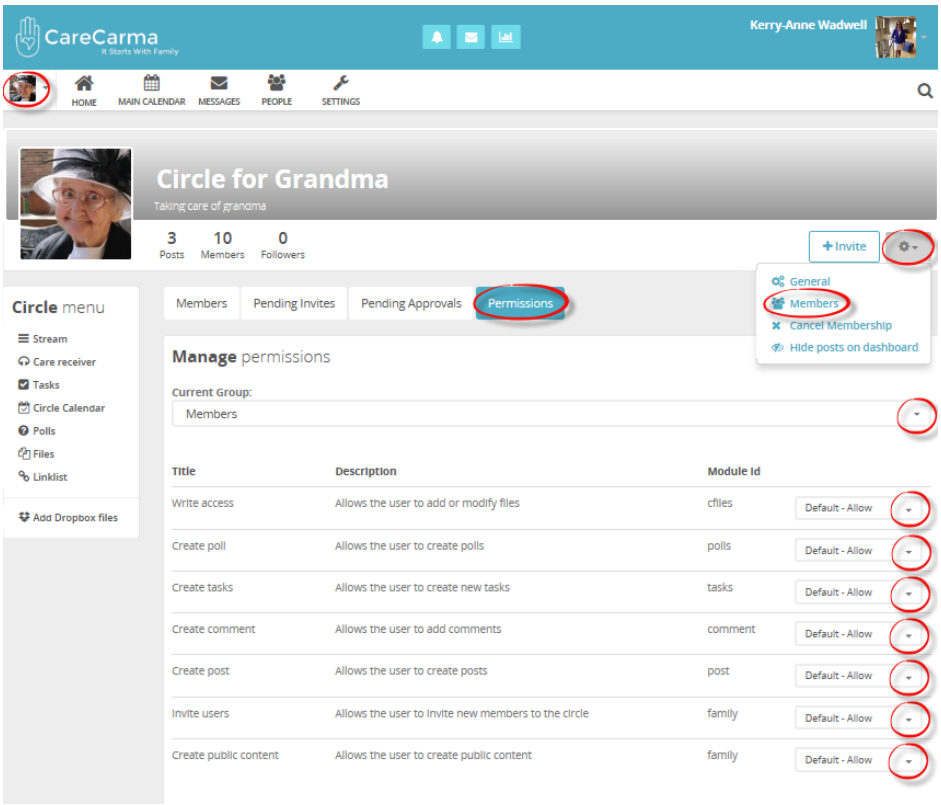

Select the **(Gear Icon)**
Select **(Members)**
Select **(Pending Invites)**
Any invitations you've sent that have not been responded to will be listed on the **(Pending Invitations)** page

CareCircle Toolbar – ⚙ (Gear Icon) – Members – Pending Approvals

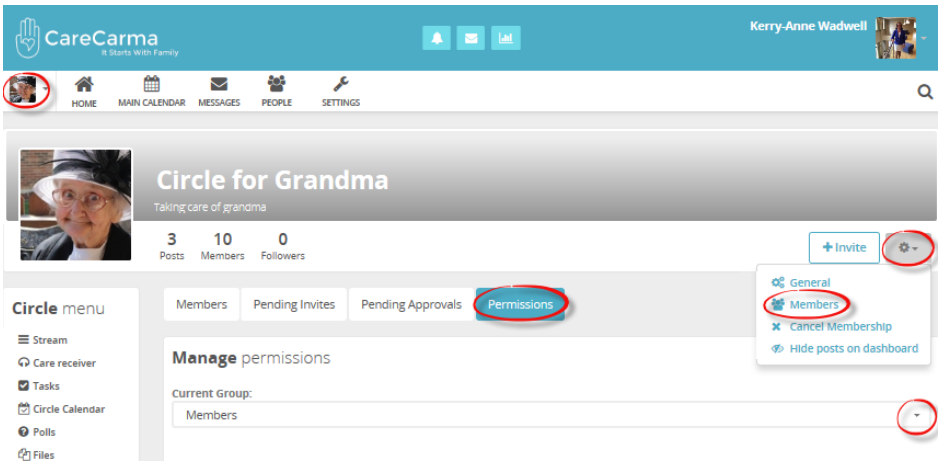


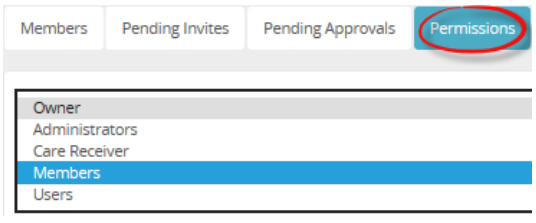

Select the **(Gear Icon)**
Select **(Members)**
Select **(Pending Approvals)**
Any approvals you've requested that have not been responded to will be listed on the **(Pending Approvals)** page

CareCircle Toolbar – ⚙ (Gear Icon) – Members – Permissions

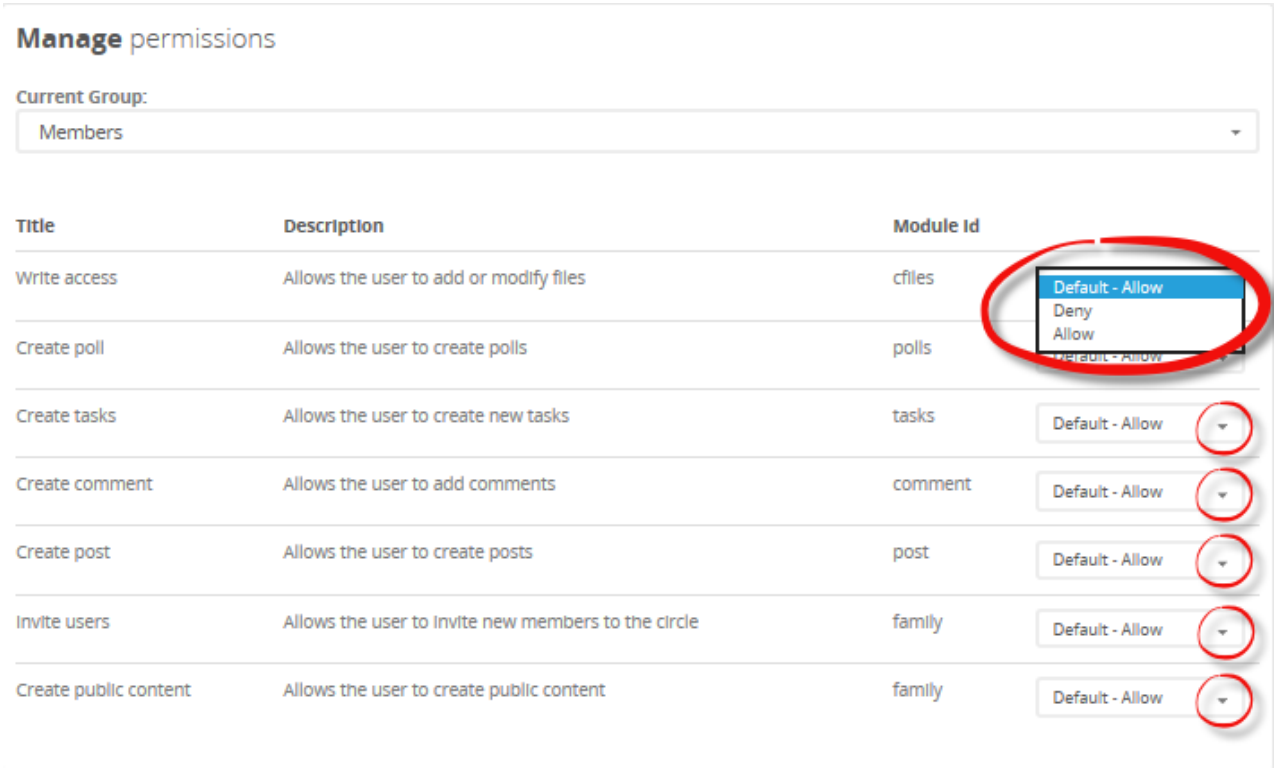



Select the **(Gear Icon)**
Select **(Members)**
Select **(Permissions)** to open the (Manage permissions) page



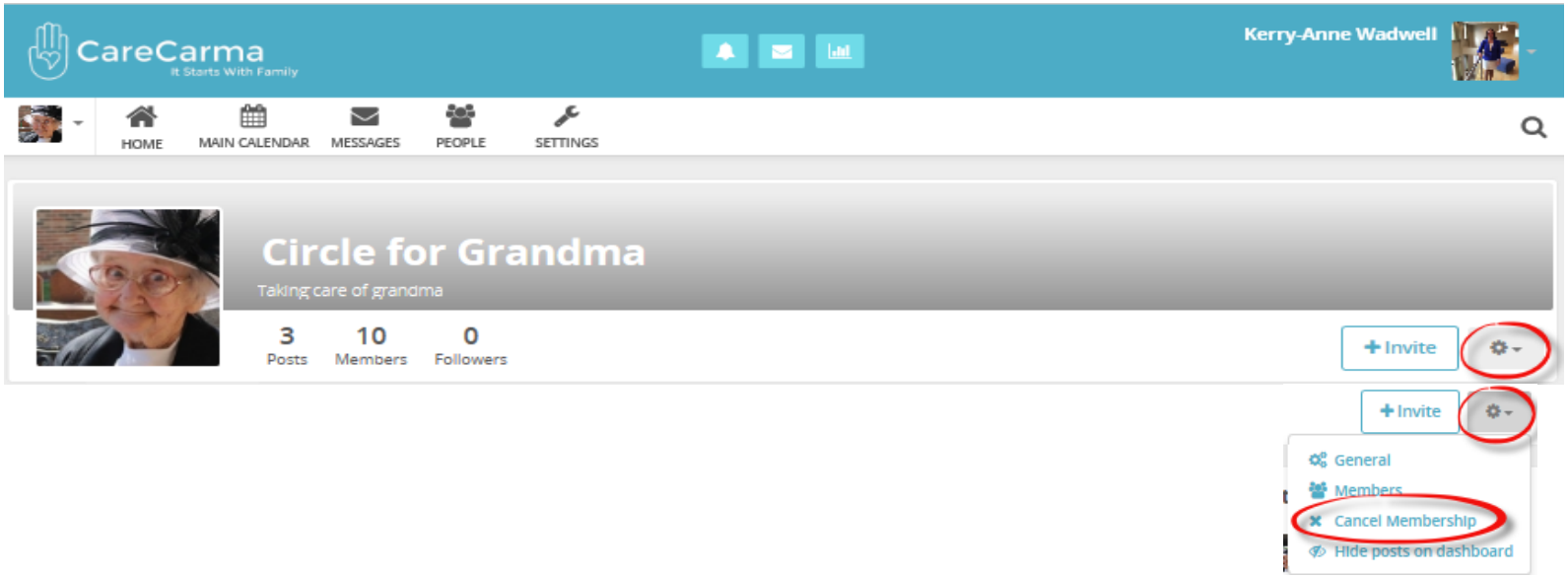




In the **(Current Group)** section, select one of the following options:
1. Owner
2. Administrator
3. Care Receiver
4. Members
5. Users



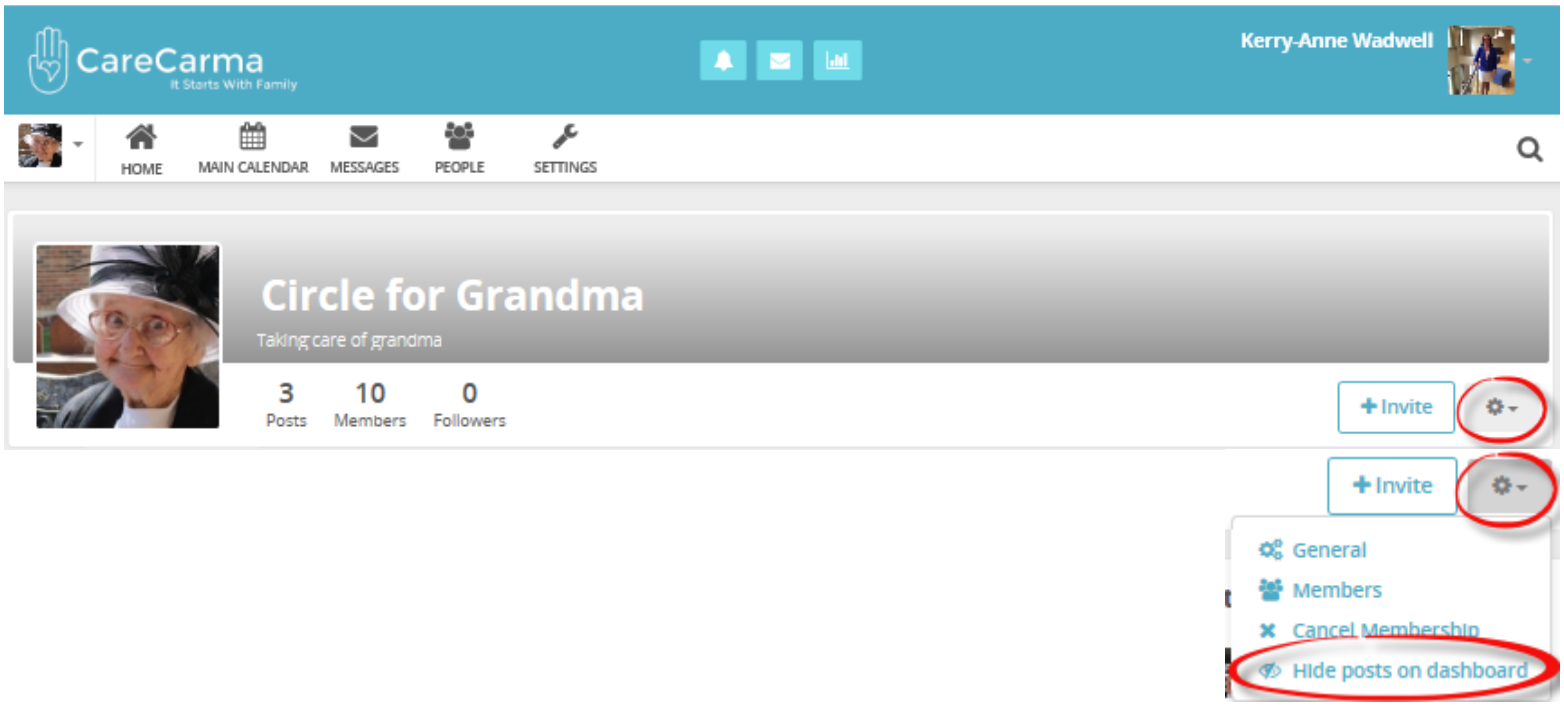

For each (Title) listed below:
Title 1. Write access – (Description: Allows the user to add or modify files)
Title 2. Create poll – (Description: Allows the user to create polls)
Title 3. Create tasks – (Description: Allows the user to create new tasks)
Title 4. Create comment – (Description: Allows the user to add comments)
Title 5. Create post – (Description: Allows the user to create posts)
Title 6. Invite users – (Description: Allows the user to invite new members to the circle)
Title 7. Create public content – (Description: Allows the user to create public content)
Select **(Default – Allow)** or **(Allow)** if you want to permit this group to make the changes designated in the description
Select **(Deny)** if you don't want to permit this group to make the changes designated in the description
Select a different **(Current Group)** and repeat the process listed above until all the **(Current Groups)** have appropriate permissions

<u>CareCircle Toolbar – ⚙ (Gear Icon) – Cancel Membership</u>




Select the **(Gear Icon)**
Select **(Cancel Membership)** to remove your profile from the CareCircle you have open
Note: To remove yourself from other CareCircles you need to access each CareCircle independently

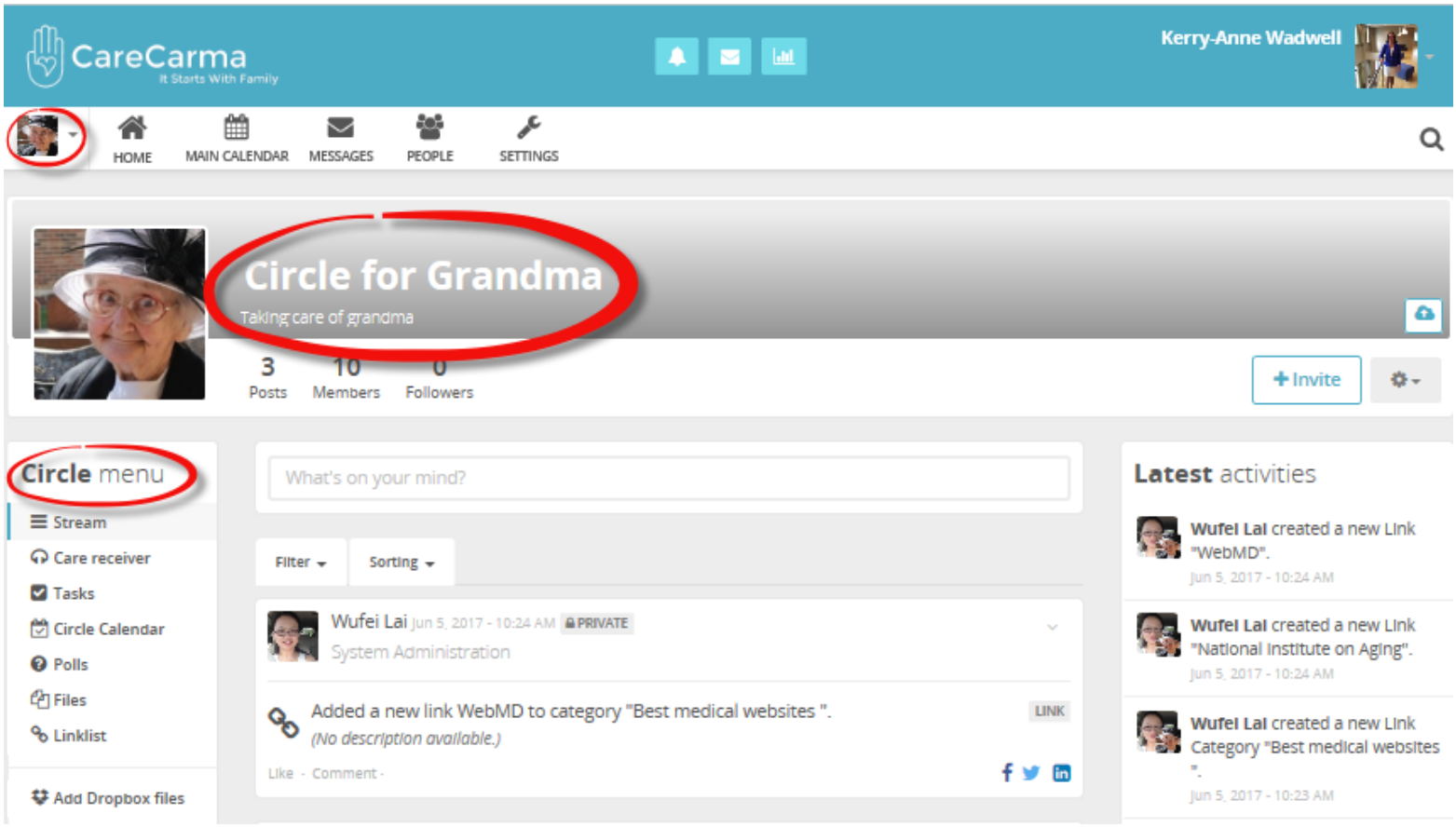
CareCircle Toolbar – ⚙ (Gear Icon) – Hide posts on dashboard




Select the **(Gear Icon)**
Select **(Hide posts on dashboard)** to hide posts on your Home Page Dashboard
Note: This does not hide posts on CareCircle dashboards
Select **(Hide posts on dashboard)** a second time to unhide posts on your Home Page Dashboard

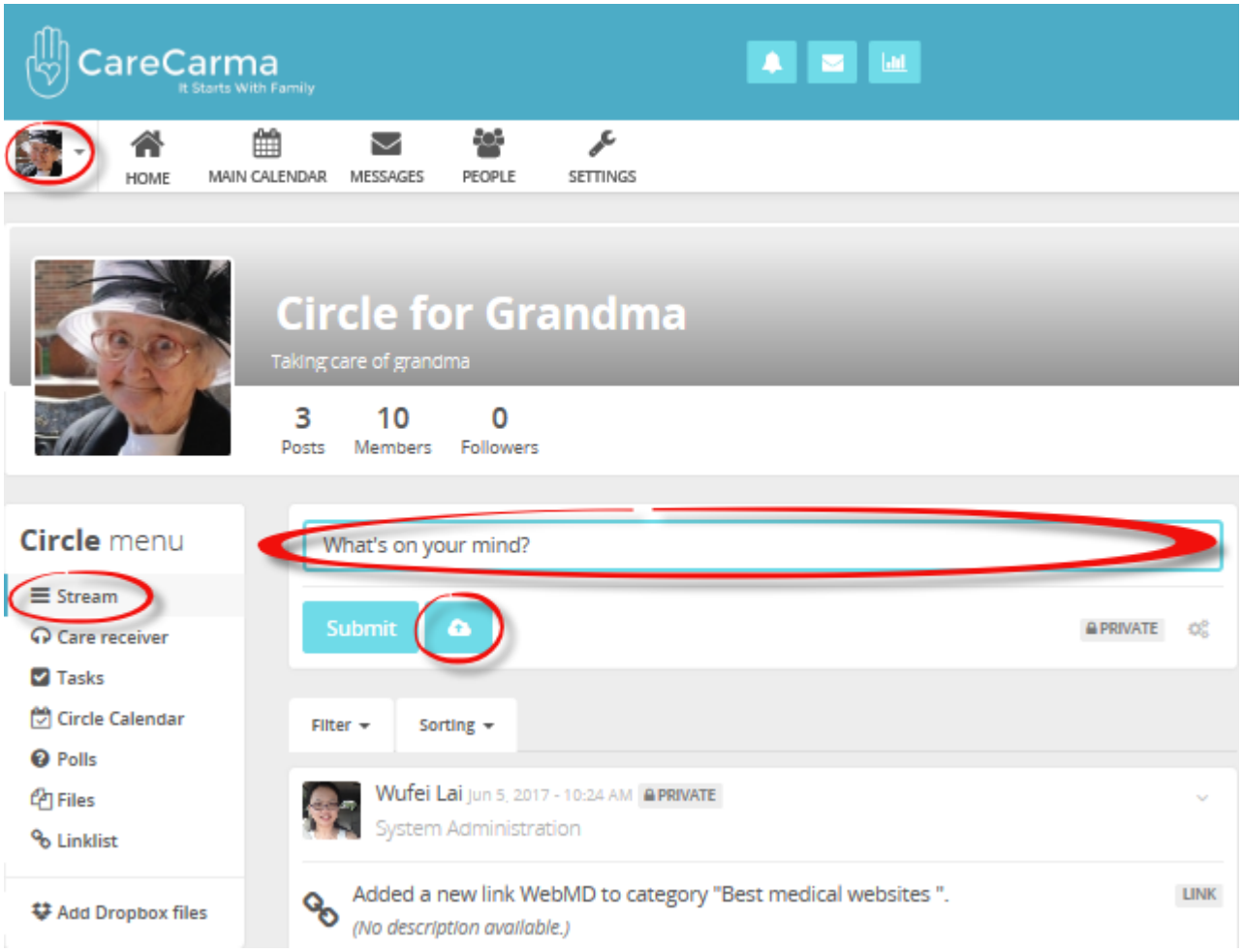
# CIRCLE MENU FUNCTIONS AND TOOLS

Menu Toolbar – My Circles – Select CareCircle – Circle Menu




To access the Circle Menu:
Select **(MY CIRCLES)** on the Menu Toolbar
Select the CareCircle you want to access from the list of CareCircles
After selection:
1. A picture of the Care Receiver for the CareCircle you've selected will replace the My Circles Icon
2. You'll be redirected to the CareCircle you selected
3. The **(Circle Menu)** will be displayed underneath the picture of the Care Receiver

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Stream

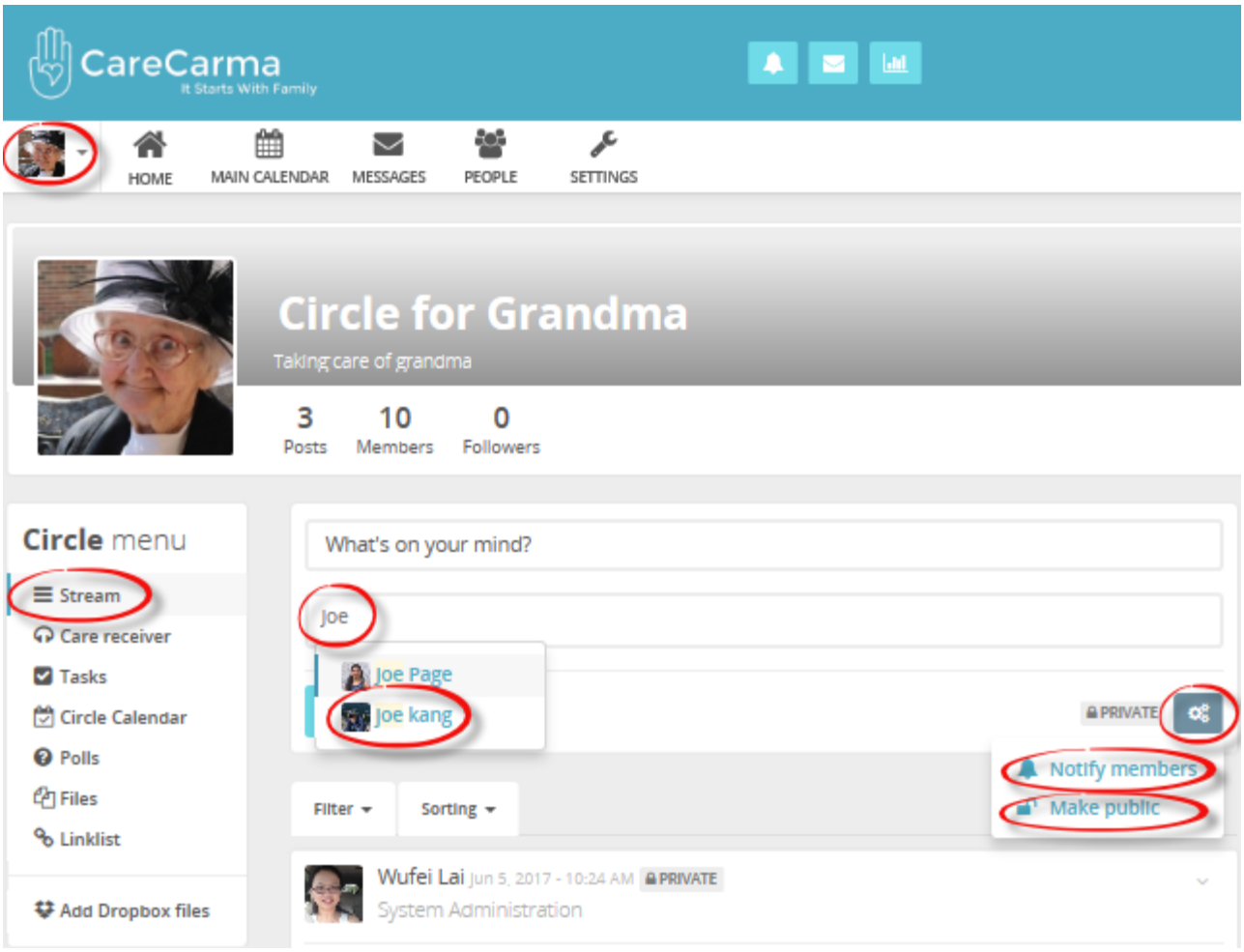



Selecting **(Stream)** in the Circle Menu allows you to view messages and post messages and files:
1. Privately to CareCircle members only
2. Publicly to all CareCarma members

To post a message:
Select the (What's on your mind?) box then write your message

To add files to your message:

Select the **(upload image)** icon
Locate the file you want to attach
Select **(open)**

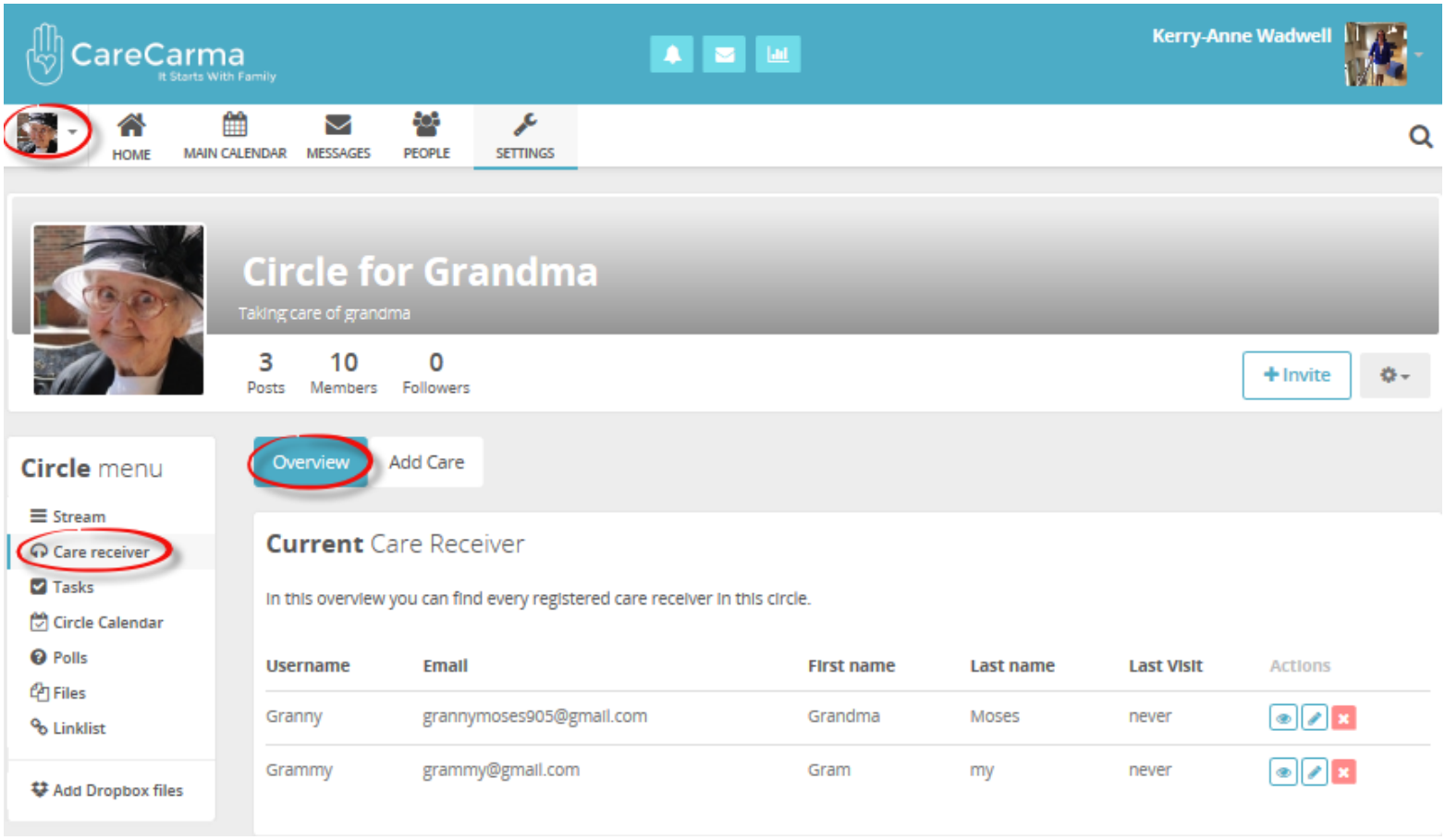



To **(Notify Members)** of a pending message:
If you want to send a notification to members letting them know there is a message pending
Select the ⚙ **(Gear Icon)**
Select **(Notify Members)**
Start typing a member's name
Select the member from the drop-down menu
Repeat the last two steps until everyone you want to send the notification to is included

To make the message **(Private)** or **(Public):**
By default, the message is set to (Private) to allow only this CareCircles members access
To change the message to (Public) to allow CareCarma members access
Select the ⚙ **(Gear Icon)**
Select **(Make Public)**

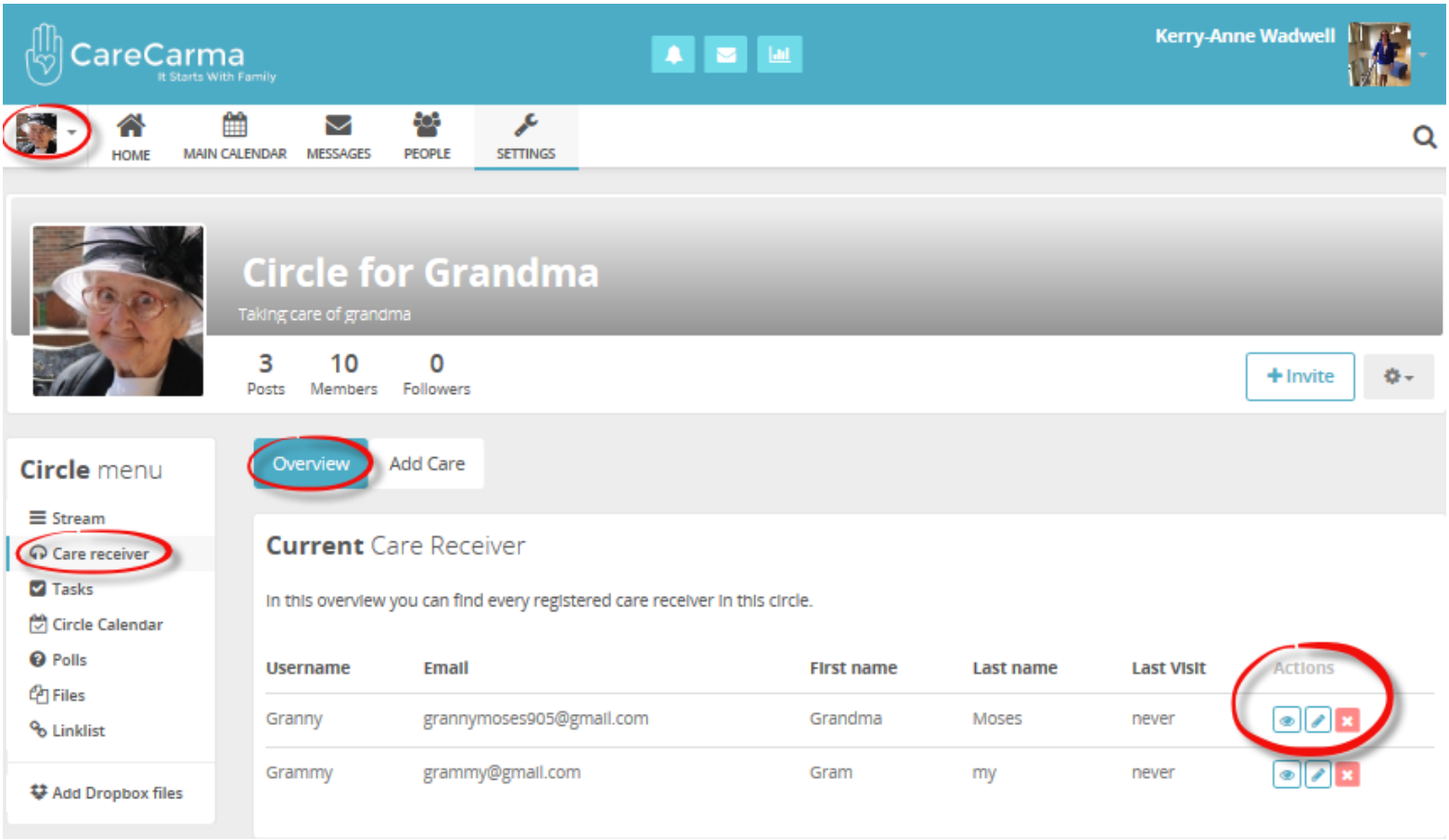
Select **(Submit)**, once the message is ready to send out

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Overview




A CareCircle can be setup for:
One (1) Care Receiver
Two (2) or more Care Receivers

Selecting **(Care Receiver)** in the Circle Menu provides an overview of every registered Care Receiver in this CareCircle, including:
1. Username
2. Email
3. First Name
4. Last Name
5. Last Visit – This is the last time the Care Receiver visited this CareCircle – It may say (never)

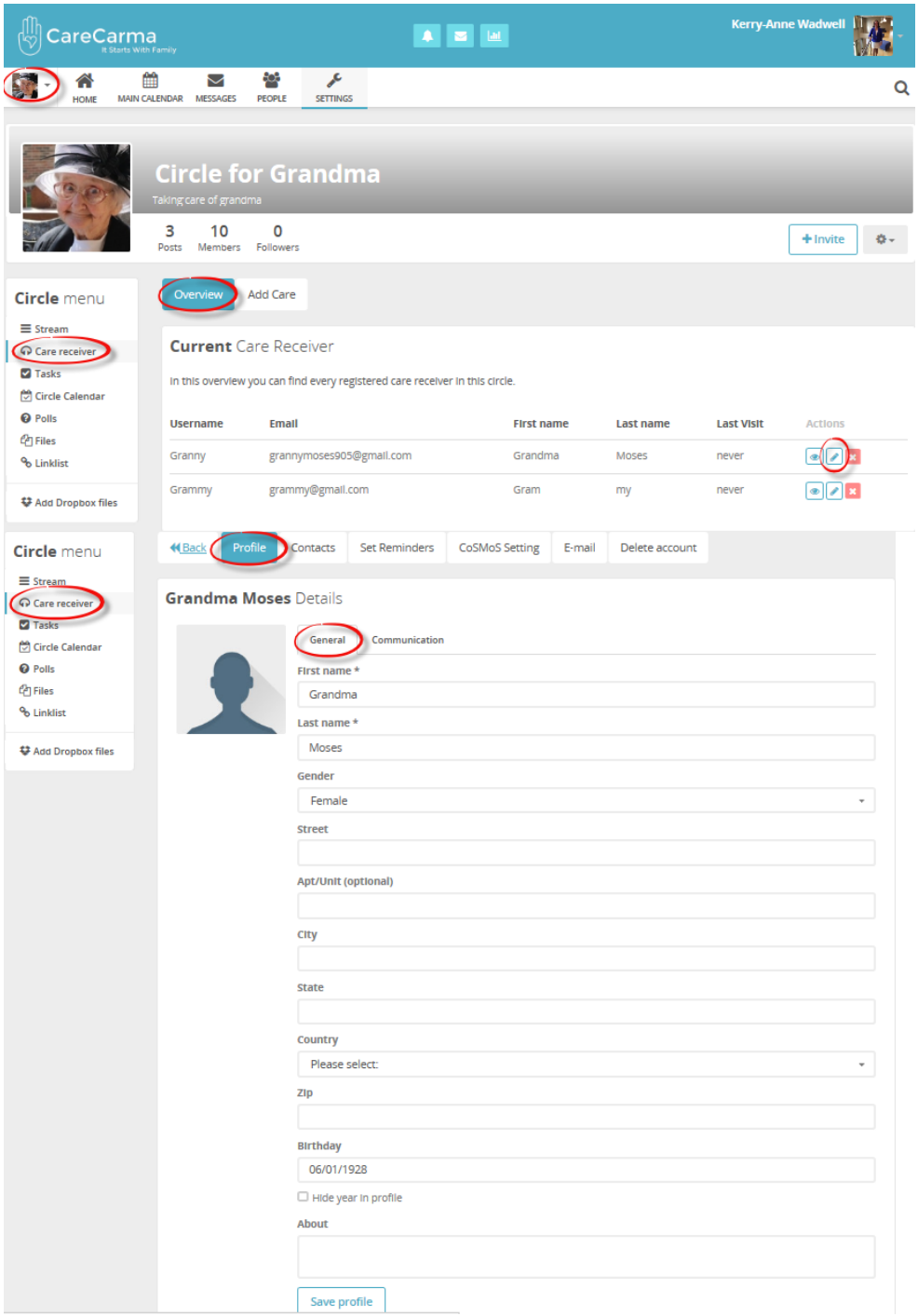



Actions: View Health Report:
Allows CareCircle members to view the Care Receivers health report(s)

Actions: Edit Account:
Allows CareCircle Administrators to edit Care Receiver details:
1. Profile
2. Contacts
3. Set Reminders
4. CoSMoS Setting
5. E-Mail
6. Delete account

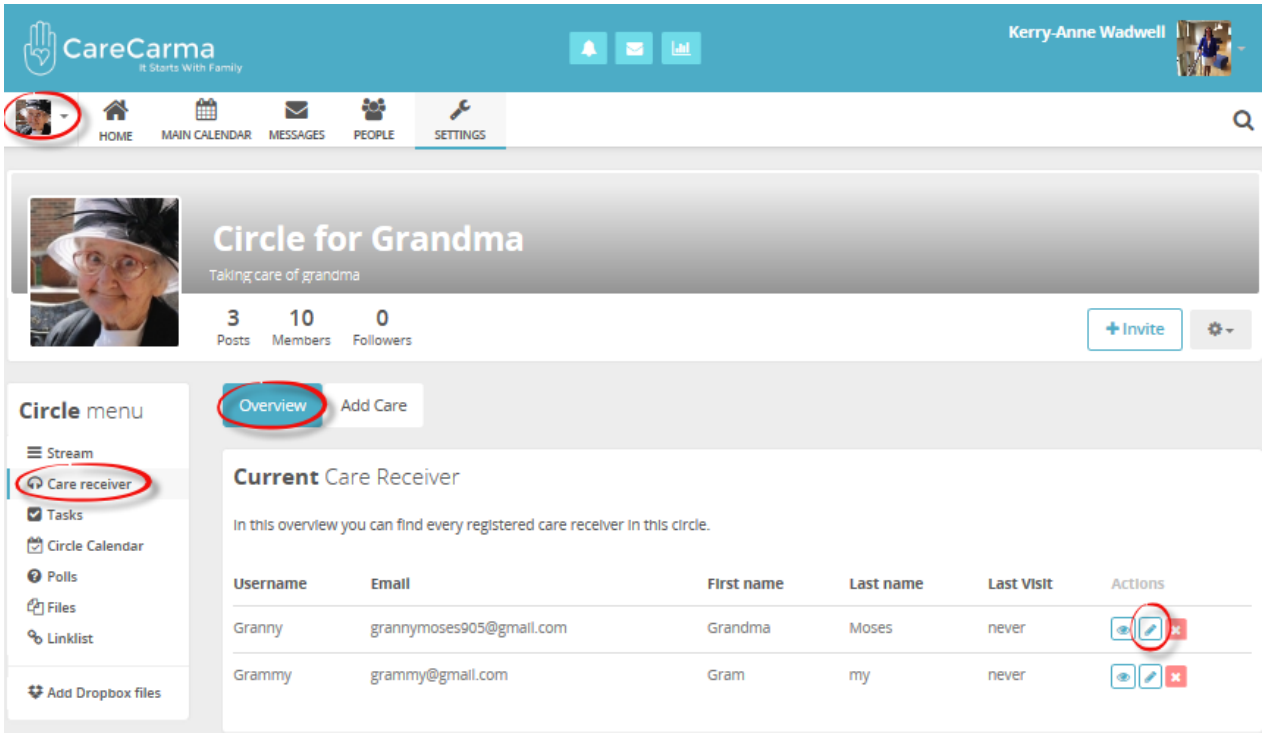
Actions: Delete Account or Change Status:
Allows CareCircle Administrators to delete a Care Receiver once care is no longer required
Allows CareCircle Administrators to change the Care Receiver status to a regular member

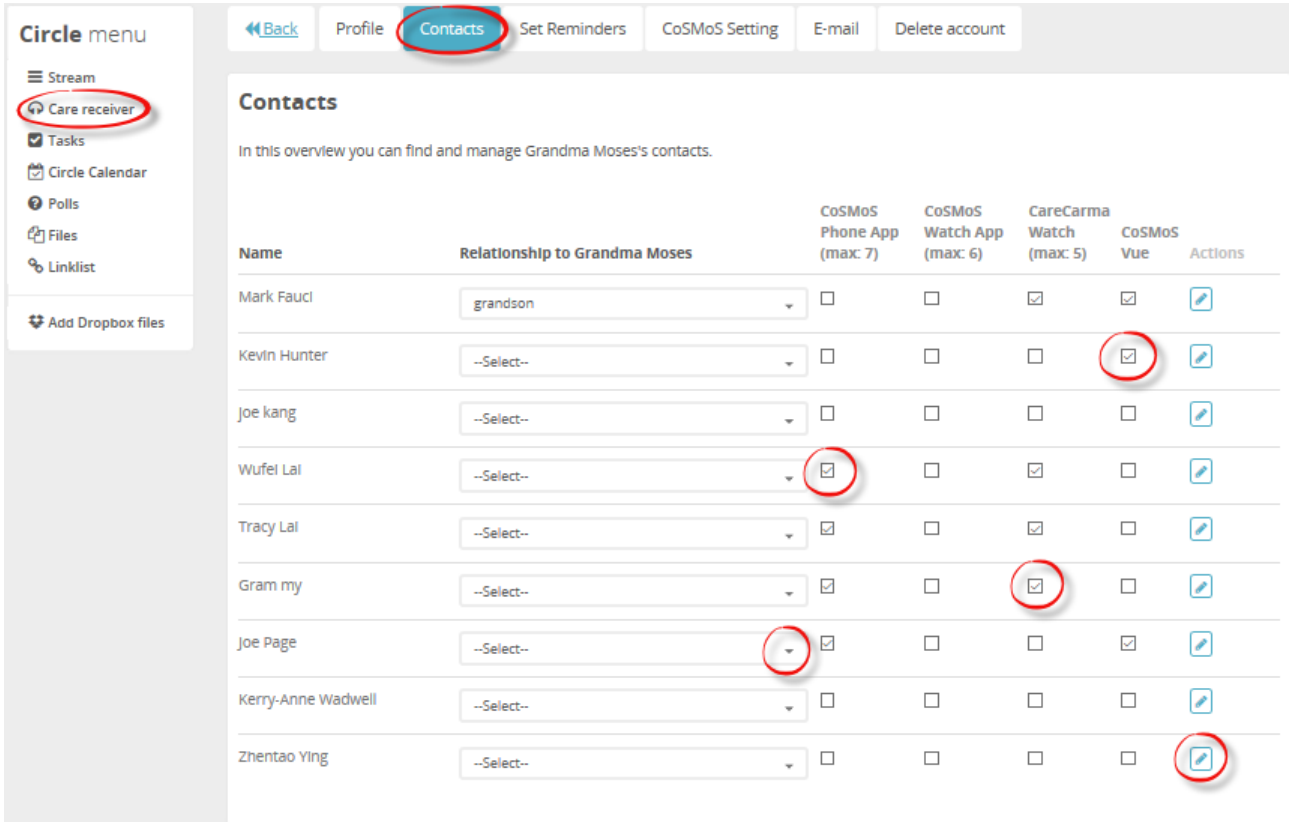
Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account – Profile




Select **(Profile)** to find and manage a Care Receivers details
Select the **(General)** tab
Enter the **(First name)** of the Care Receiver
Enter the **(Last name)** of the Care Receiver
Optional: Enter information in the other fields
Optional: **(Check)** the **(Hide year in profile)** to not allow members to know the Care Receivers year of birth
Optional: **(Uncheck)** the **(Hide year in profile)** to allow members to know the Care Receivers year of birth
Optional: Enter information in the **(About)** section
Select **(Save Profile)**
Select the **(Communications)** tab
Optional: Enter your **(home phone number)**
Optional: Enter your **(work phone number)**
Optional: Enter your **(mobile phone number)**
Select **(Save Profile)**

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account – Contacts

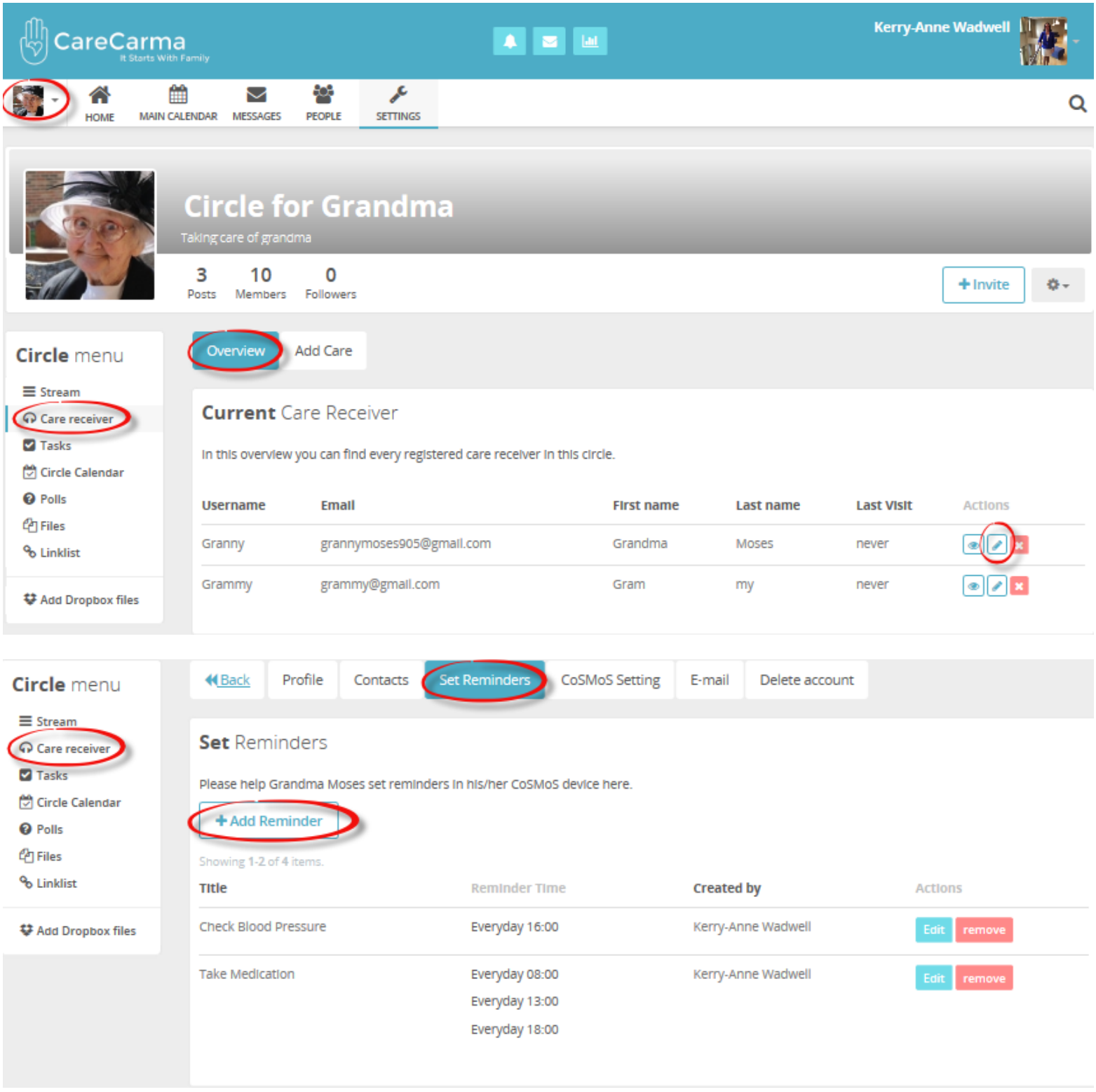


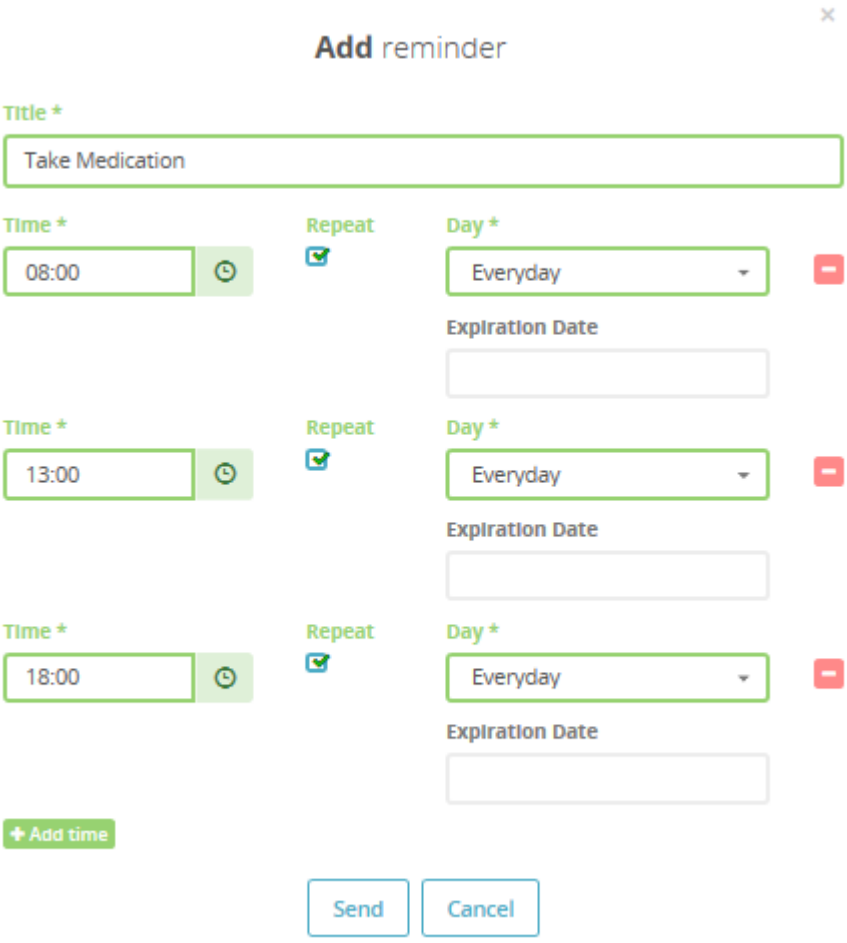

Select **(Contacts)** to find and manage a Care Receivers contacts
Select the box beneath the heading **(Relationship to Care Receiver)** to select the relationship of each contact to the Care Receiver
Select which contacts (Max 7) will be a Primary Number on Cosmos Phone App
Select which contacts (Max 6) will be a Primary Number on CoSMoS Watch App
Select which contacts (Max 5) will be a Primary Number on CareCarma Watch
Select which contacts will be a Primary Number on CoSMoSVue Glasses
Select the ✎ (modify) icon adjacent any contact to edit a contacts details or their status on a Care Receivers device

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account – Set Reminders

Select **(Set Reminders)** to manage reminders on devices



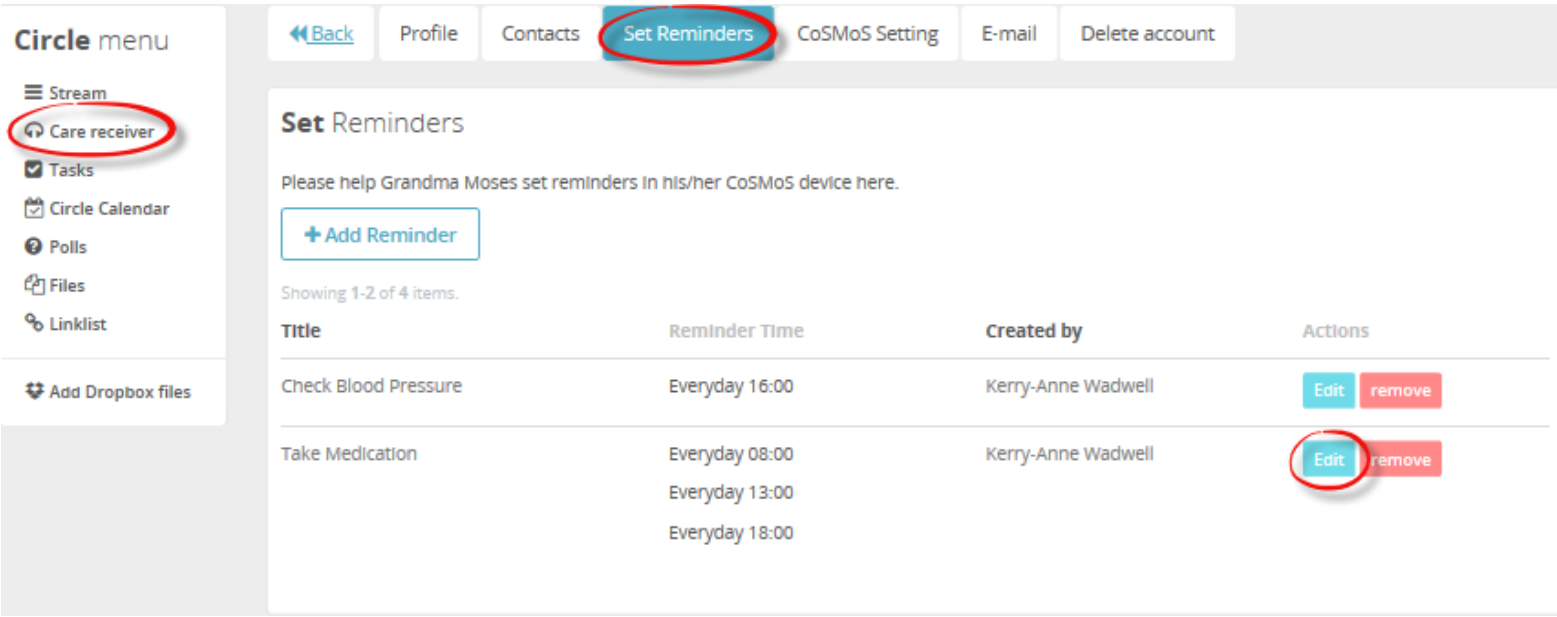
To add reminders:
Select **(+ Add Reminder)** to open the Add Reminder pop-up



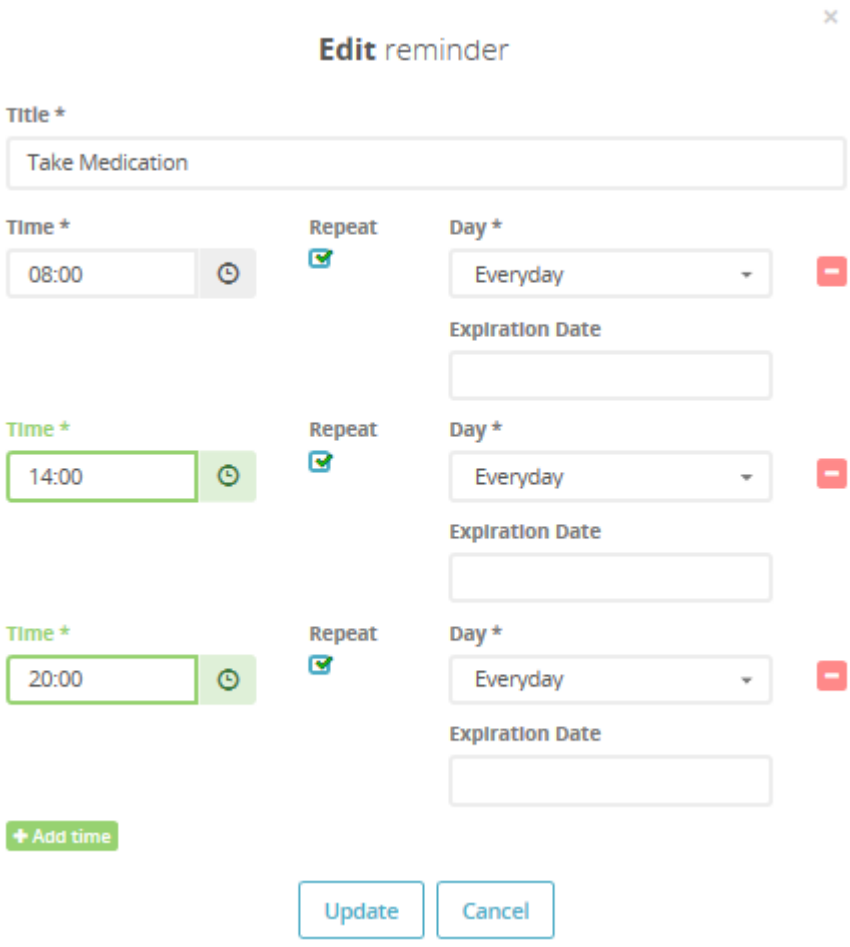

In the **(Title)** section, enter a name for the reminder, e.g. Take Medication
In the **(Time)** section, select the (Clock) icon
Select the **(Λ)** or **(V)** down arrows to adjust the **(Hour)**
Select the **(Λ)** or **(V)** down arrows to adjust the **(Minute)**
Uncheck the **(Repeat)** box if this reminder is required one time for a specific date
In the **(Date)** section, select the date for the reminder using the left and right arrows to scroll back and forth between the months
Check the **(Repeat)** box if this reminder occurs more than one time
In the **(Date)** section, select one of the following appropriate options:
1. Everyday
2. Every Sunday
3. Every Monday
4. Every Tuesday
5. Every Wednesday
6. Every Thursday
7. Every Friday
8. Every Saturday

Select **(+ Add time)** to add another time this reminder will occur. Repeat the steps above
Select the (Remove) icon adjacent the (Time) to delete this time from the reminder
When all the reminder times have been included:
Select **(Send)** to add reminder to devices
Select **(Cancel)** to not add reminder to devices

To edit reminders:

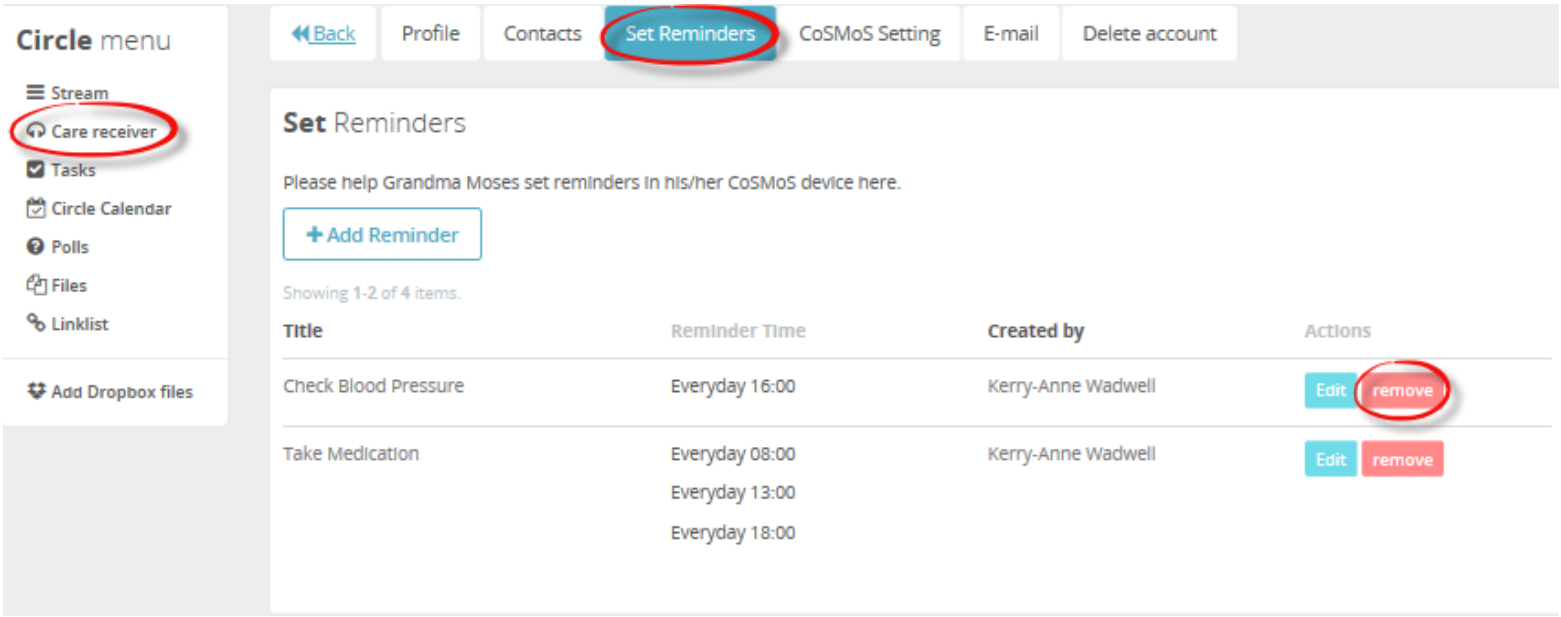



In the (Actions) section, select **(Edit)** adjacent the reminder you want to edit to access the (Edit reminder) popup
Refer to the steps in the (add reminders) section listed above to edit the reminder

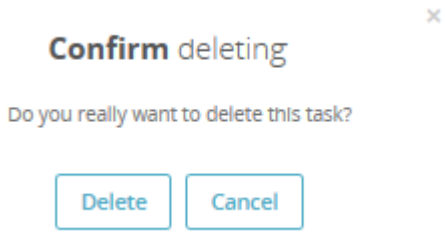



Select **(Update)** to edit reminder on devices
Select **(Cancel)** to not edit reminder on devices

To remove reminders:

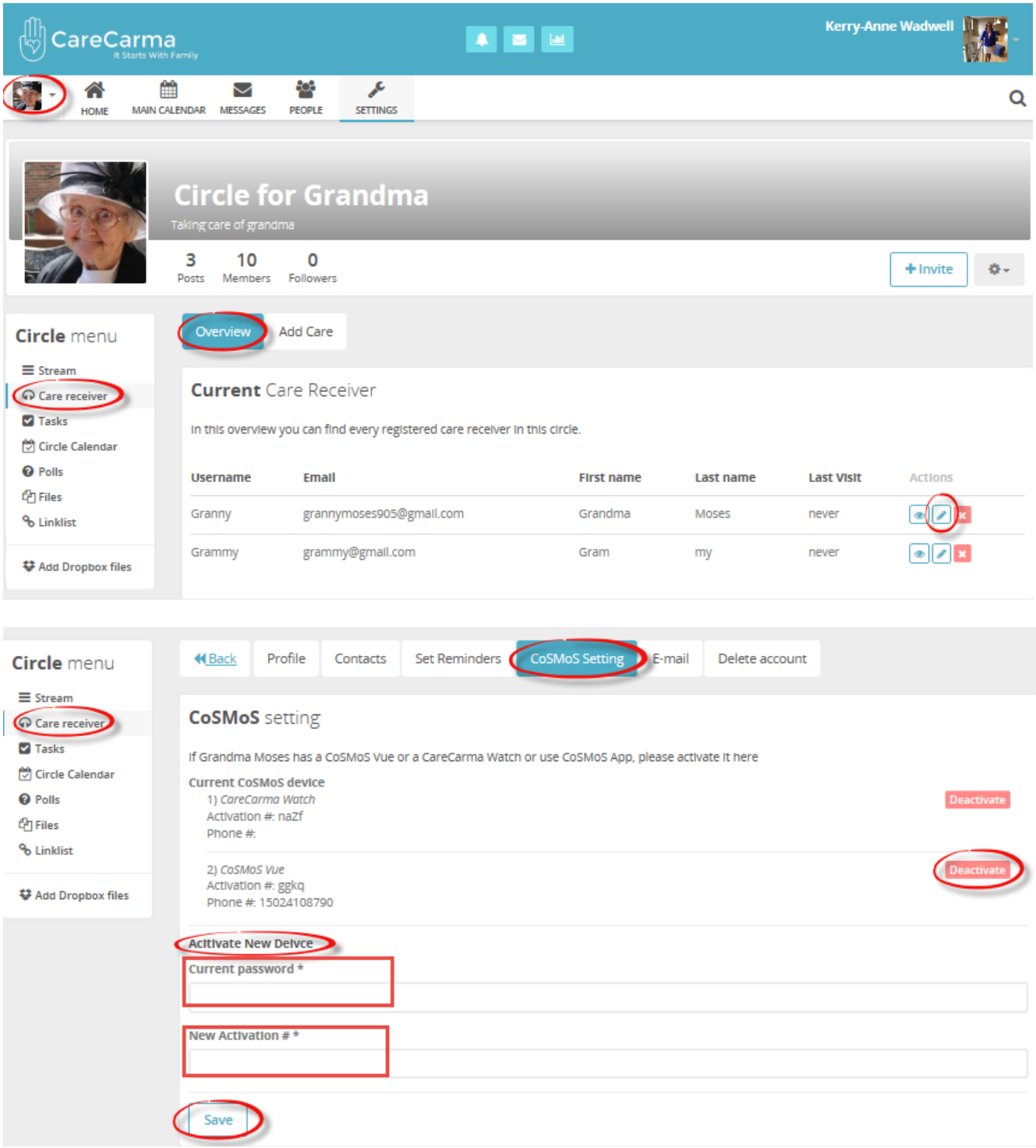



In the (Actions) section, select **(remove)** adjacent the reminder you want to remove to access the (Confirm deleting) pop-up




Select **(Delete)** to remove the reminder
Select **(Cancel)** or **(X)** to not remove the reminder

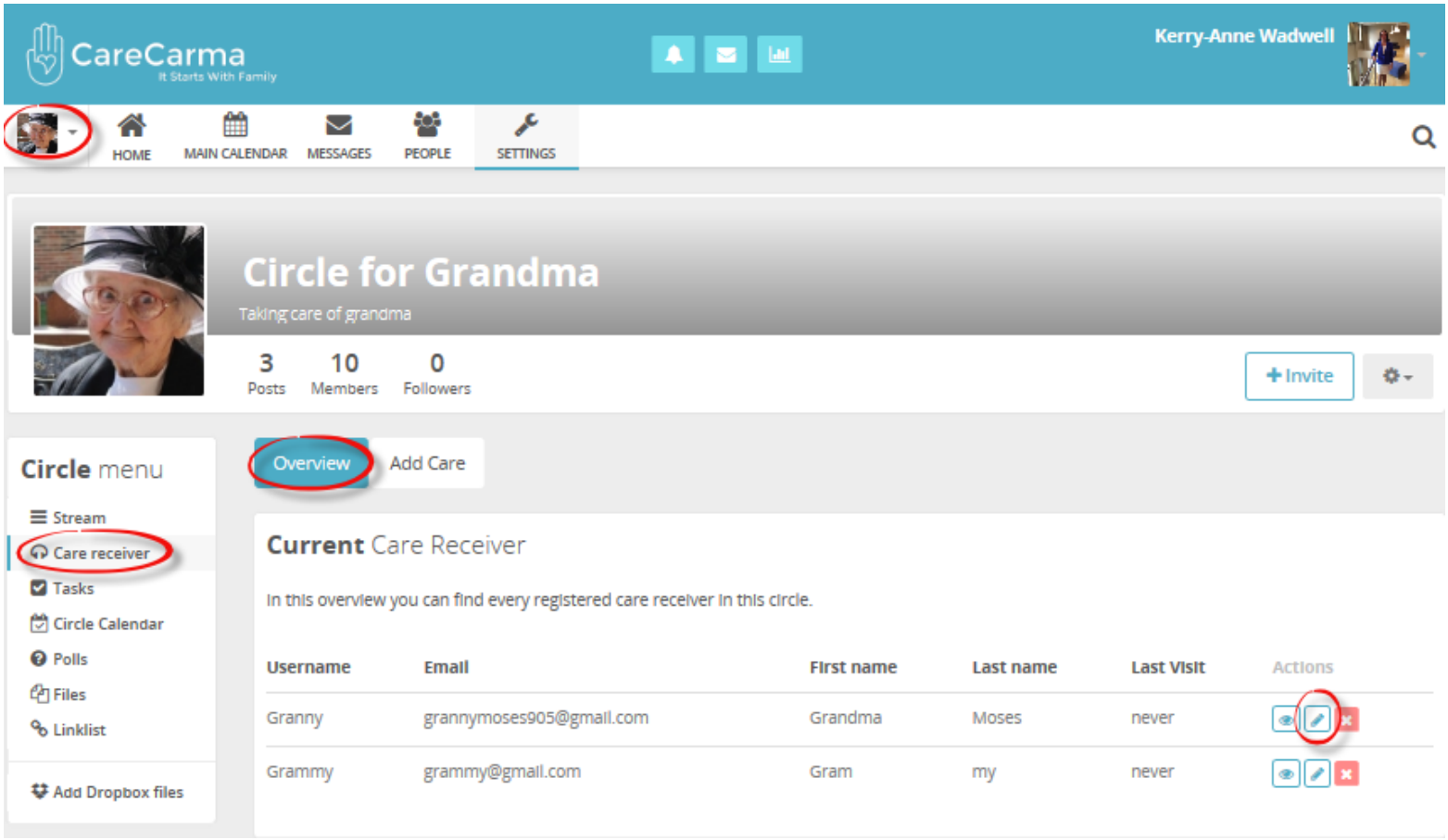
Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account – CoSMoS Setting
Select **(CoSMoS setting)** to activate / deactivate CoSMoS devices or use the CoSMoS App

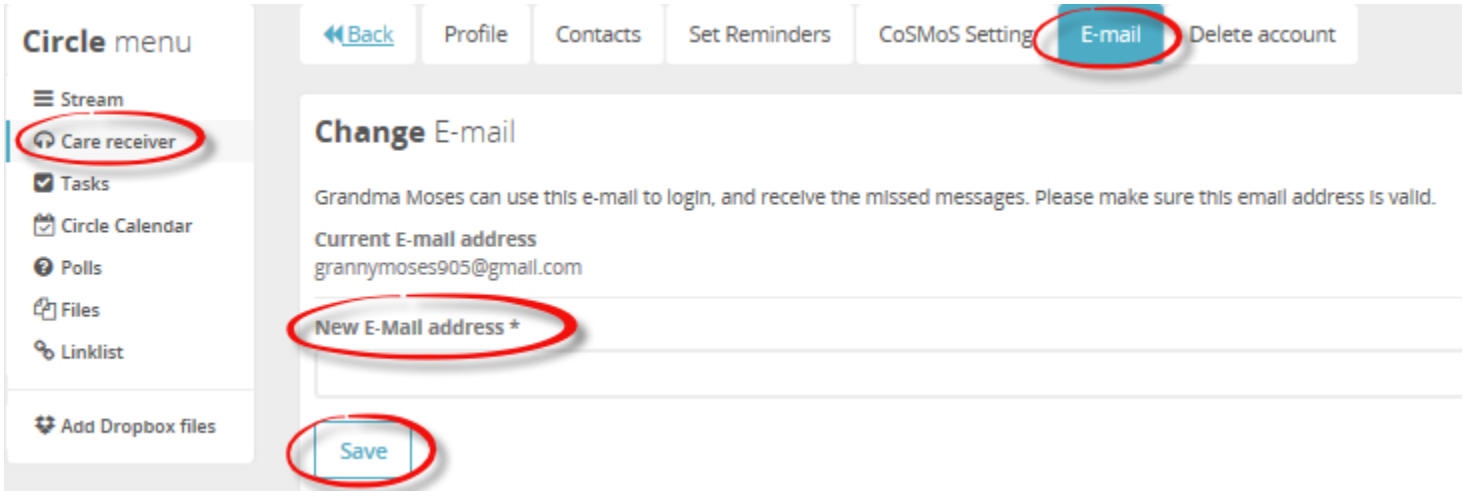



To Deactivate Devices:
Active devices are listed under the heading **(Current CoSMoS)**
Select **(Deactivate)** adjacent the CoSMoS device you want to deactivate

To Activate New Devices:
In the **(Current password)** section, enter your password – This is the same password that you entered to sign-up or log-in
In the **(New Activation #)** section, enter the activation ID:
1. That came with the CoSMoS device
2. That was given to you when you installed the CoSMoS App on your phone
Select **(Save)**

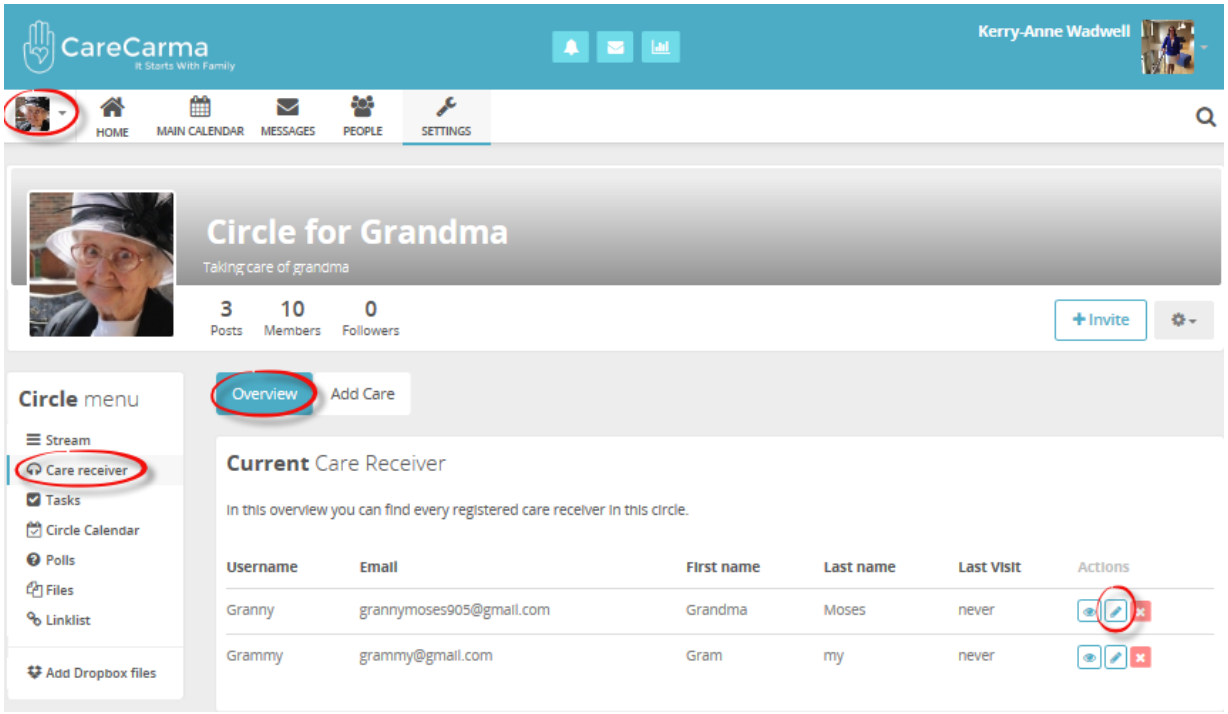
Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account – Email

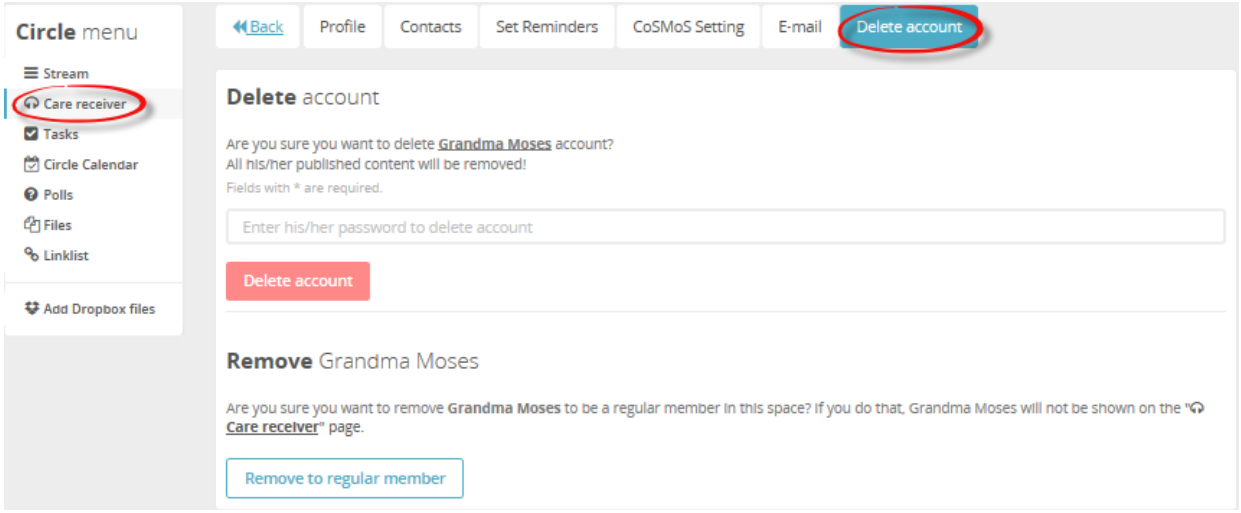



Select **(E-mail)** to change the Care Receivers email address
The email address previously added for the Care Receiver is listed under the heading **(Current E-Mail address)**
To change the (Current E-Mail address):
In the **(New E-Mail address)** section, enter the Care Receivers new email address
Select **(Save)**

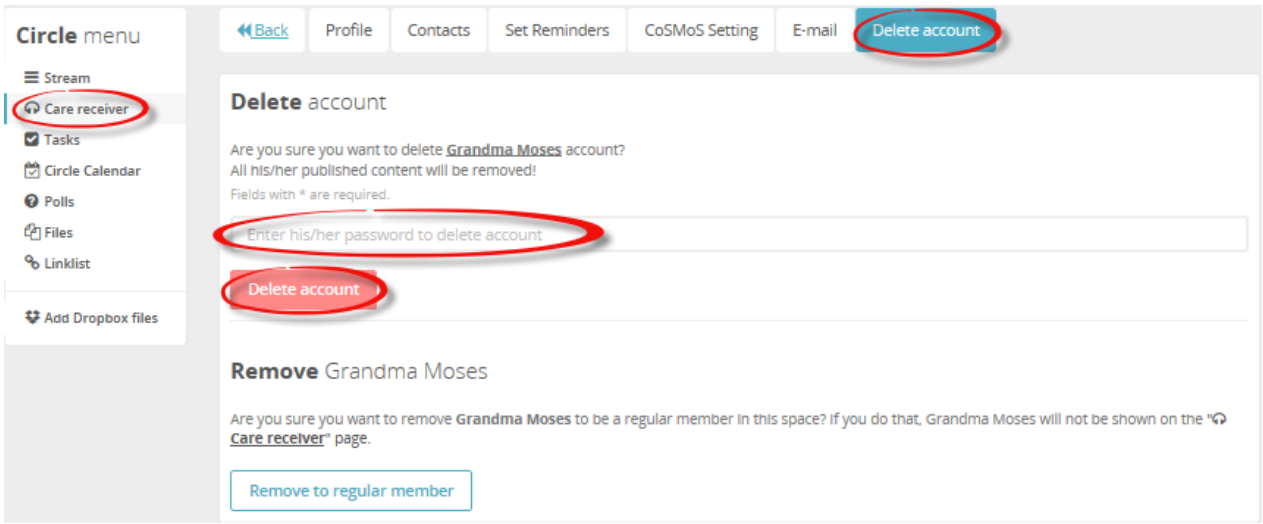
Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Care Receiver – Edit Account –Delete Account



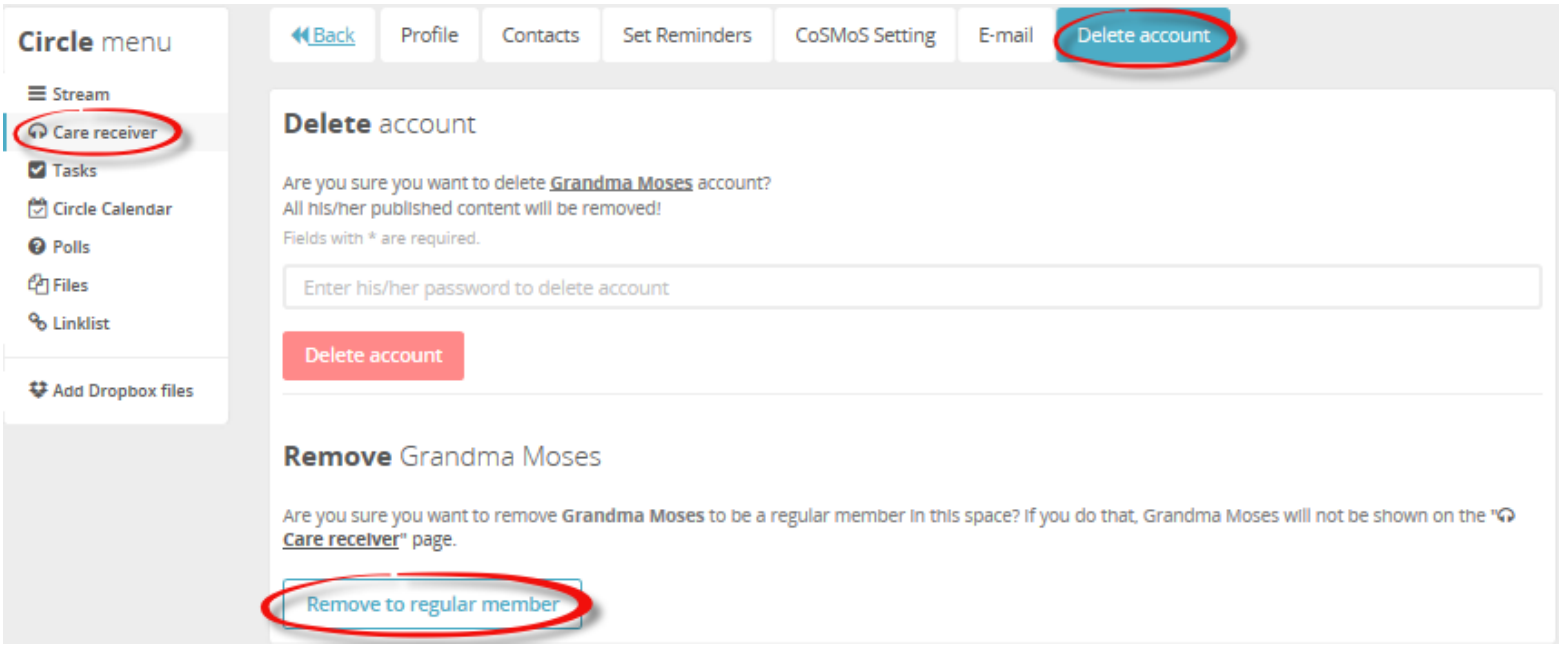




Selecting (Delete Account):

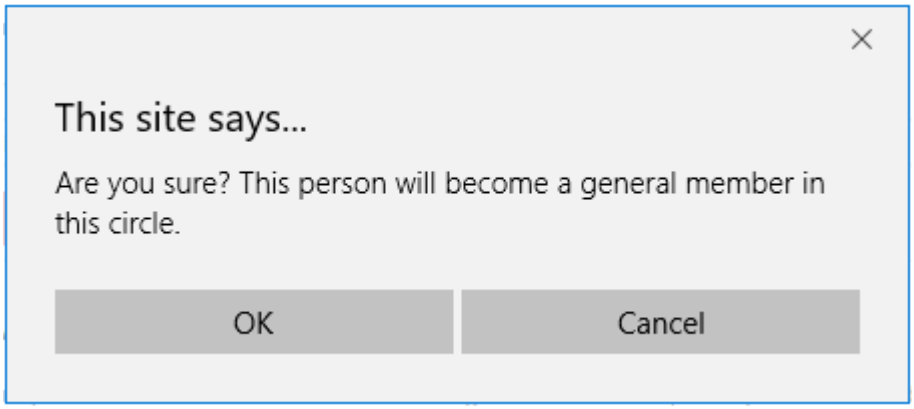
1. Deletes a Care Receiver account and all the published content it contains
2. Changes the Care Receivers status to (Regular Member)



To delete a Care Receiver account:
Select **(Delete Account)** to access the **(Delete Account)** pop-up which will ask:
"Are you sure you want to delete Care Receivers Name account? All published content will be removed!"
If you DON'T want to permanently delete the Care Receivers Account:
You can (Archive) the Account which makes the Account inactive but retains the Accounts published content
If you want to permanently delete the Care Receiver's Account:
In the **(Enter his/her password to delete account)** section, enter the password
This is the same password that was entered to sign-up or log-in
Select **(Delete account)**

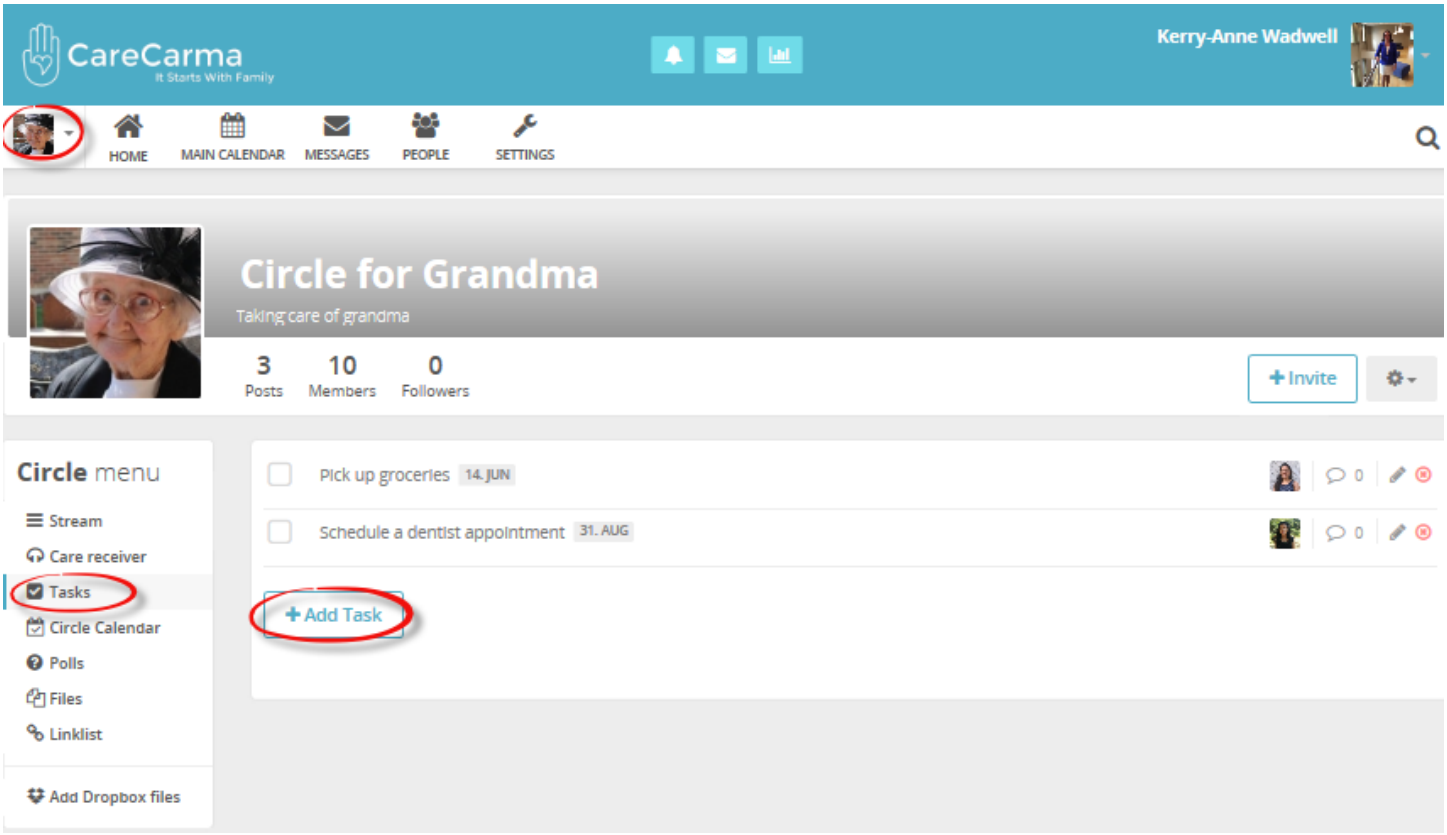



To change the Care Receivers status to (Regular Member):
Select **(Remove to regular member)** to access the **(Remove Care Receiver)** pop-up

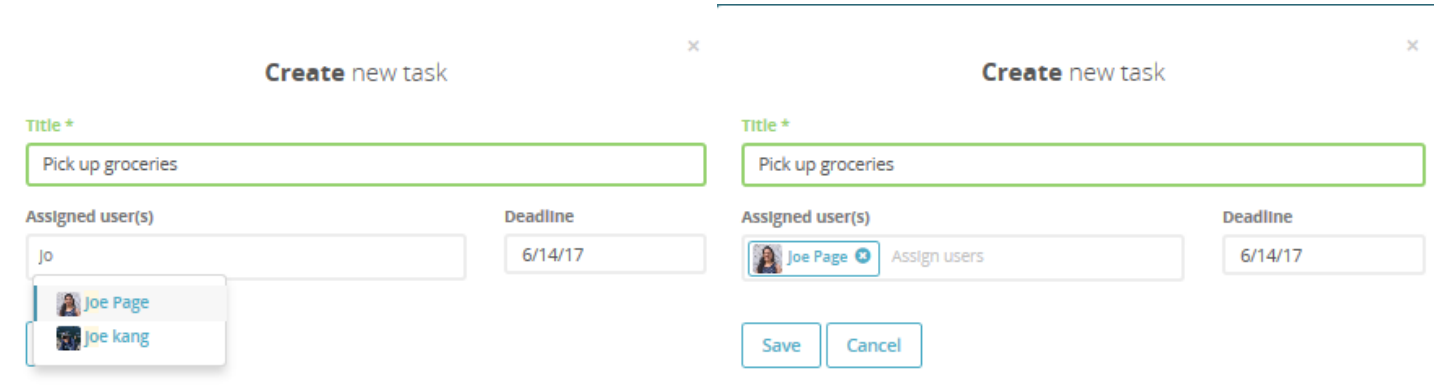



Select **(Ok)** to change the Care Receivers status to Regular Member
Select **(Cancel)** to NOT change the Care Receivers status to Regular Member

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Tasks

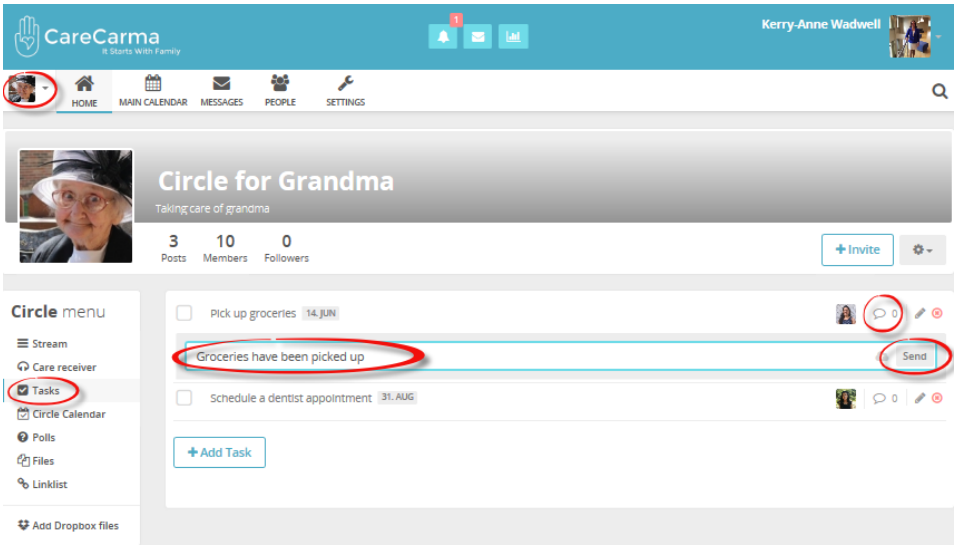



Tasks can be assigned to CareCircle members
To add a task:
Select **(Tasks)** in the Circle Menu
Select **(Add Task)** to access the **(Create new task)** pop-up



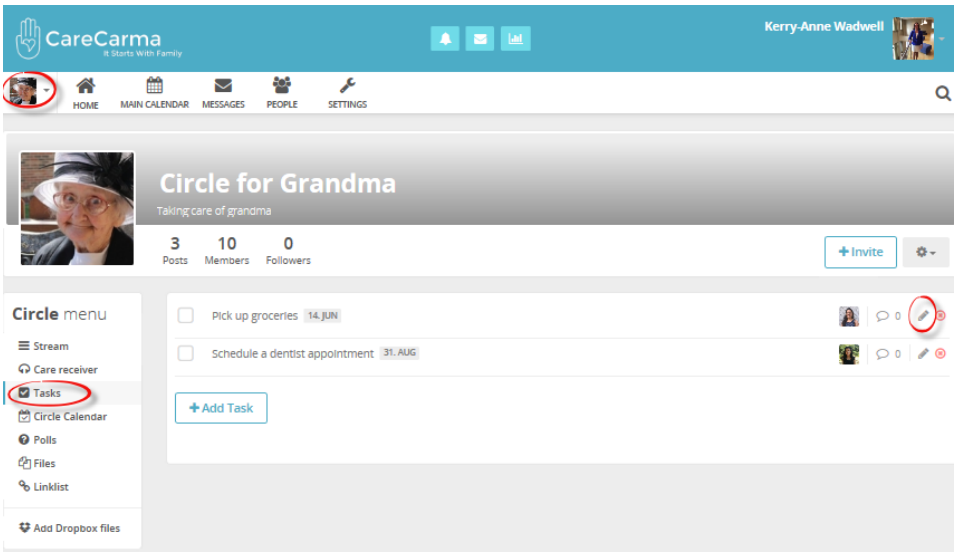

In the **(Title)** section, enter a Title for the task
In the **(Assigned User(s)** section:
Start typing a member's name
Select the member from the drop-down menu
Repeat the last two steps until everyone you want assigned to this task is included
In the **(Deadline)** section, choose a date from the drop-down calendar
Select **(Save)** when the new task details are accurate
Select **(Cancel)** if you don't want to save the new task

To add a comment to a task:

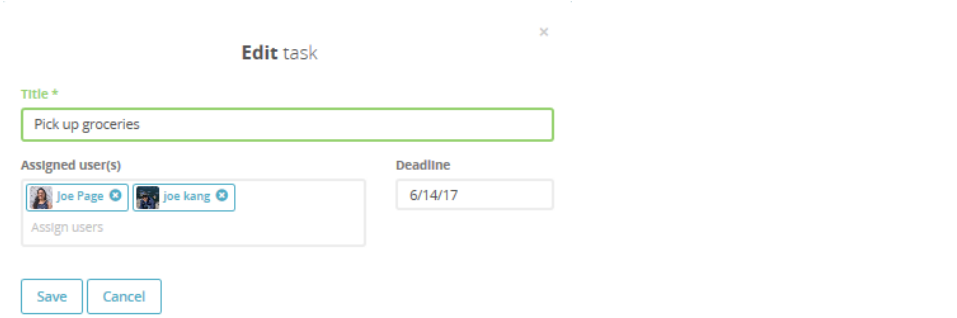



Select **(Tasks)** in the Circle Menu
Select the **(Comment)** icon adjacent the task to access the comments section
Enter your comment
Select **(Send)** to send the comment to all CareCircle members

To edit a task:

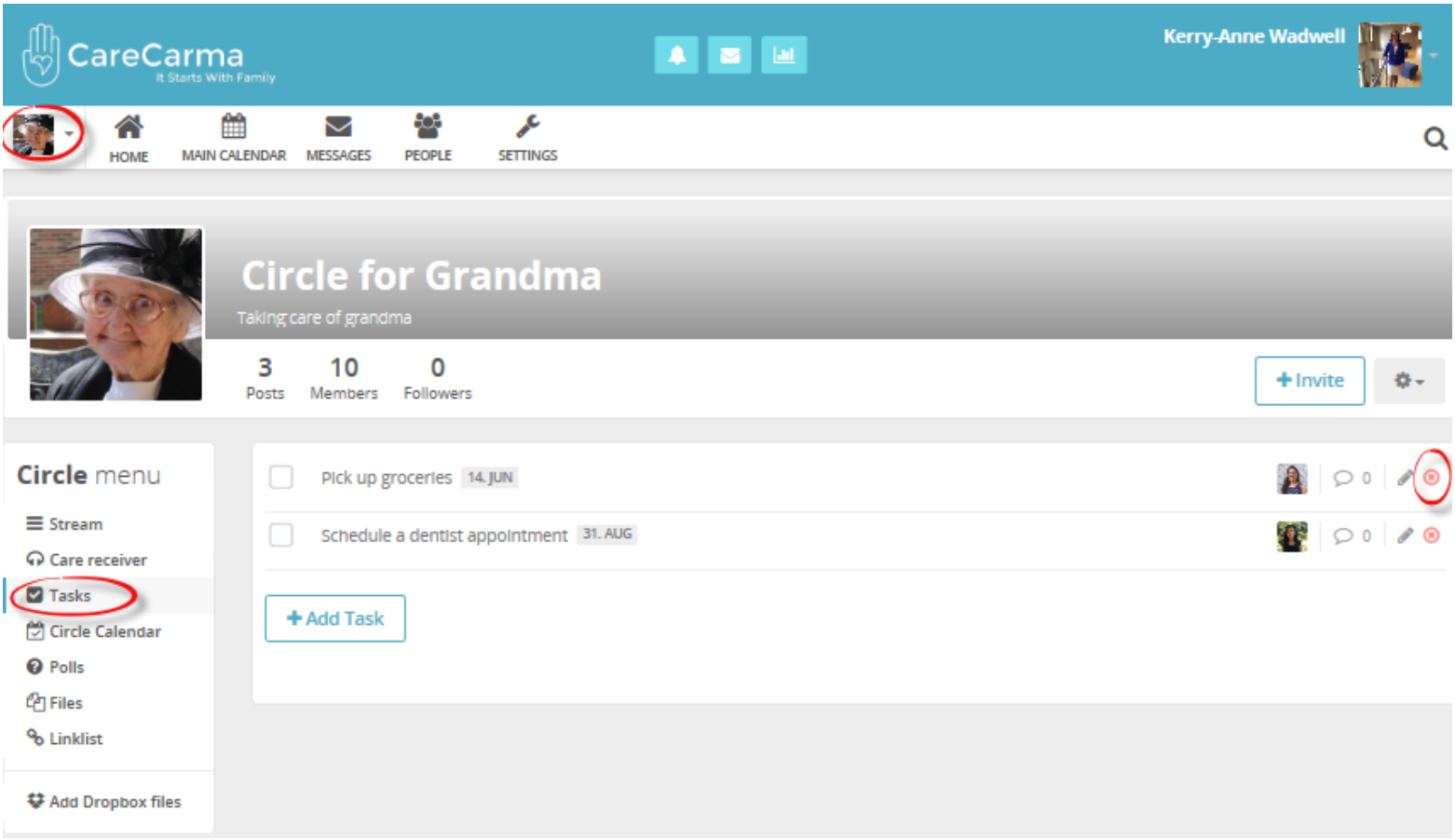



Select **(Tasks)** in the Circle Menu
Select the **(Edit)** icon adjacent the task you want to edit to access the (Edit task) popup

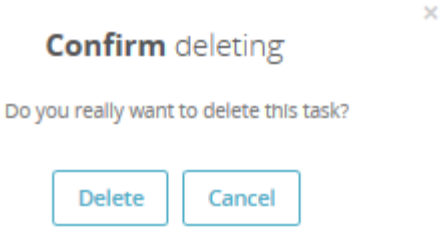



Refer to the steps in the (add tasks) section listed above to edit the task
Select **(Save)** to edit the task
Select **(Cancel)** to not edit the task

To delete a task:

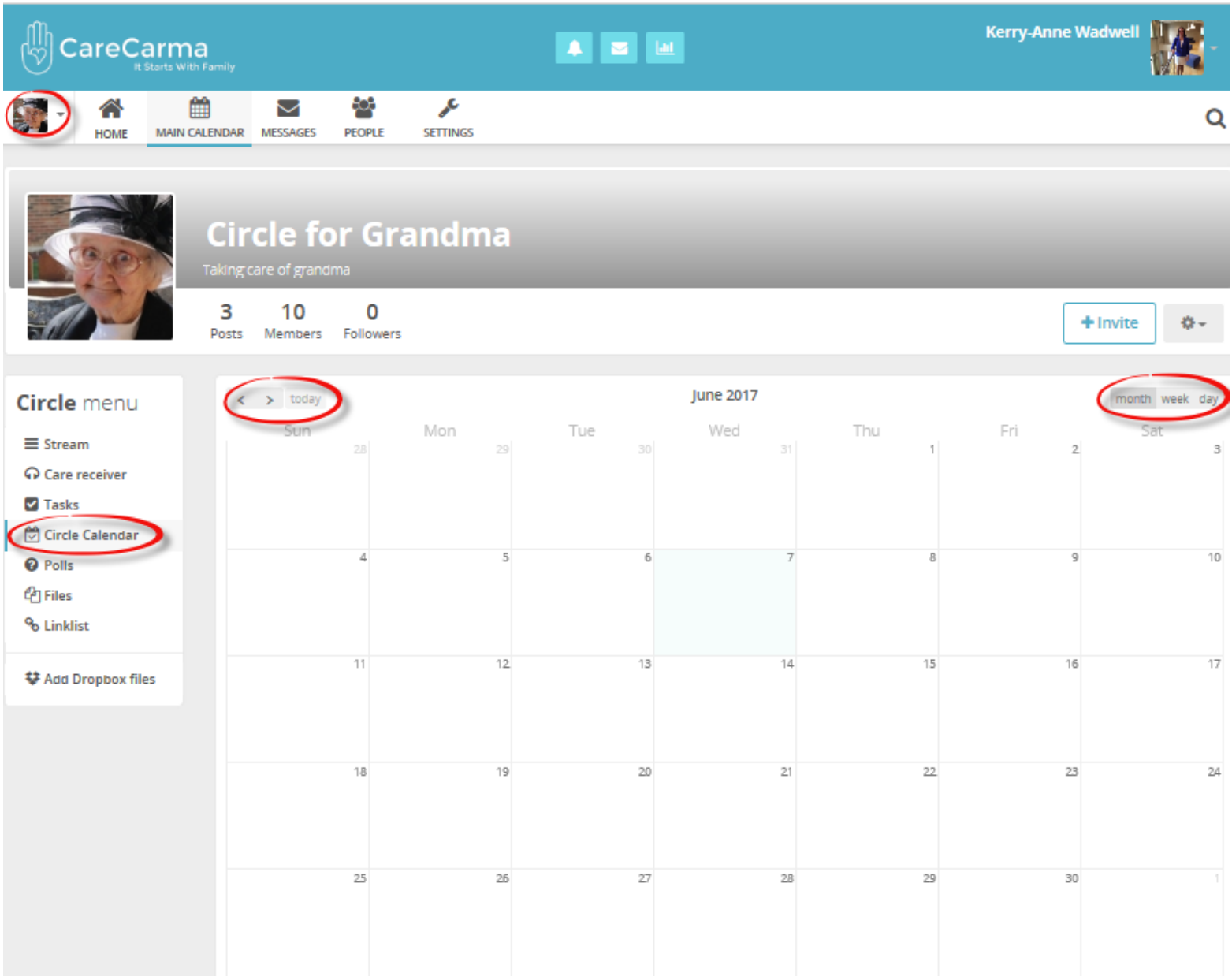



Select **(Tasks)** in the Circle Menu
Select the **(Delete)** icon adjacent the task you want to delete to access the (Delete task) popup




Select **(Delete)** to delete the task
Select **(Cancel)** to not delete the task

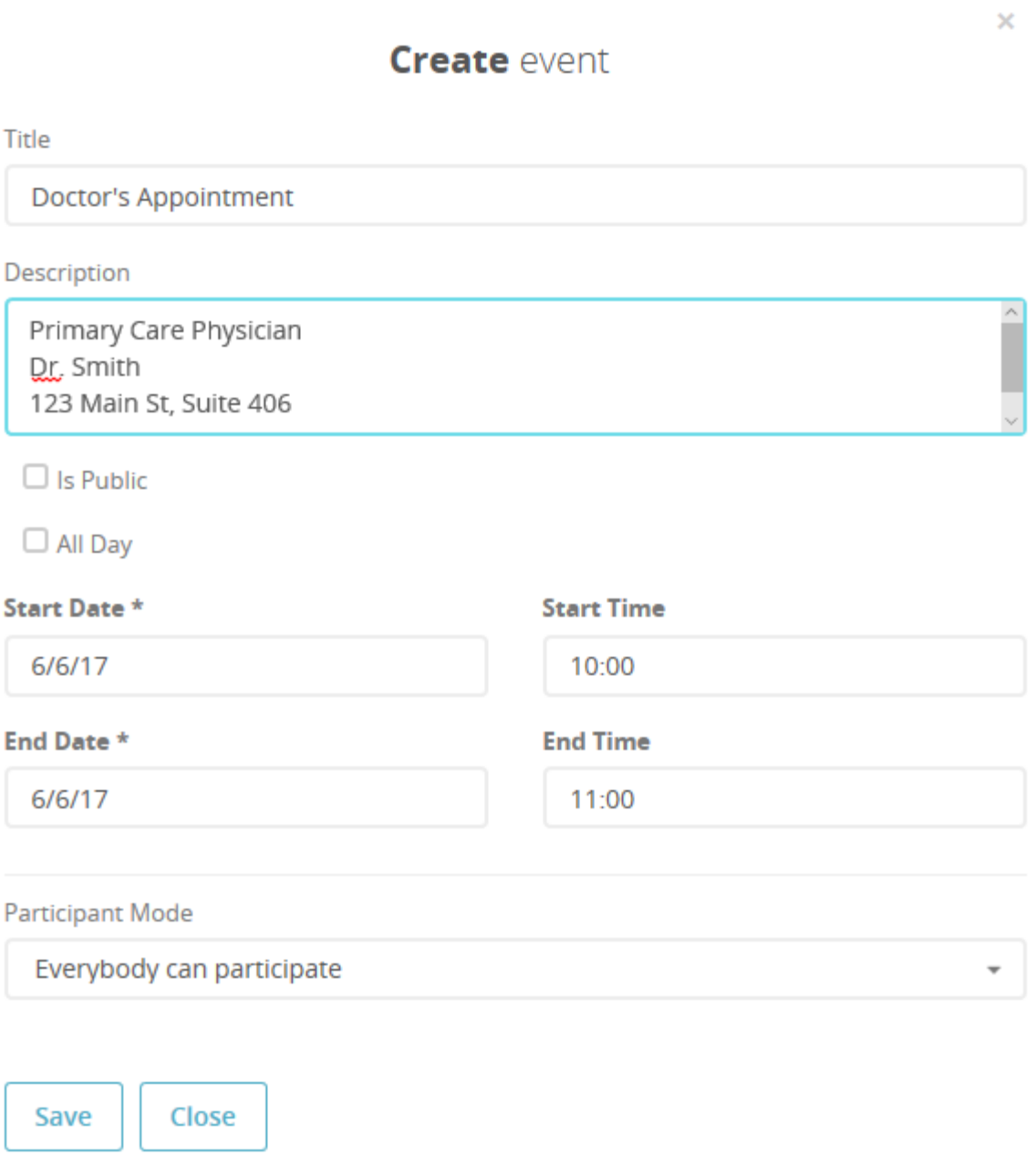
Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Circle Calendar



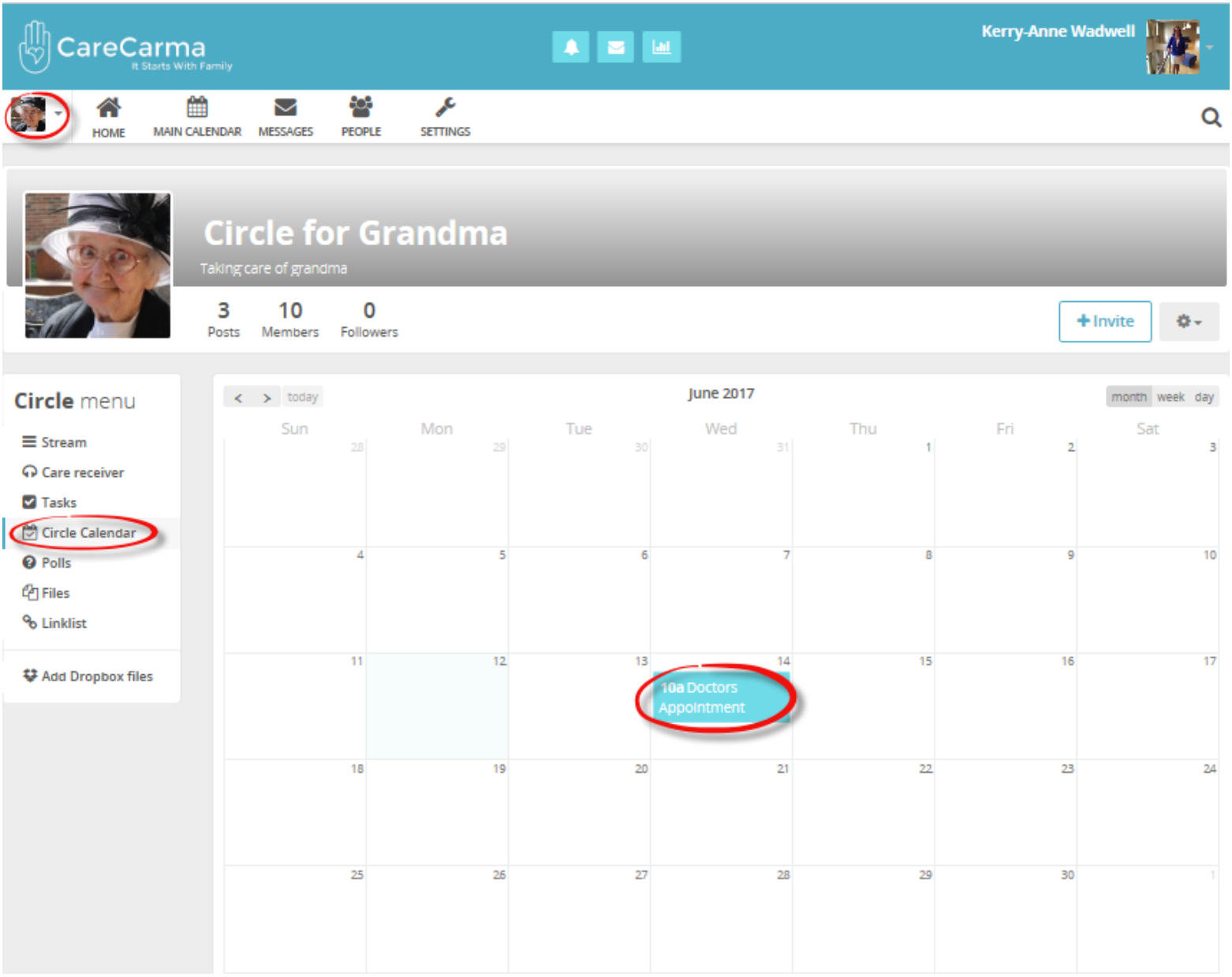

Selecting **(Circle Calendar)** in the Circle Menu allows you to schedule events on a calendar
Only this CareCircle's members can view and edit a Circle Calendar
Events scheduled on any Circle calendar(s) you have access to, will also appear on your Main Calendar
Editing an event in either the Main Calendar or Circle Calendar(s), will update the event in all relevant calendars

To view the calendar by month, select **(month)**
To view the calendar by week, select **(week)**
To view the calendar by day, select **(day)**

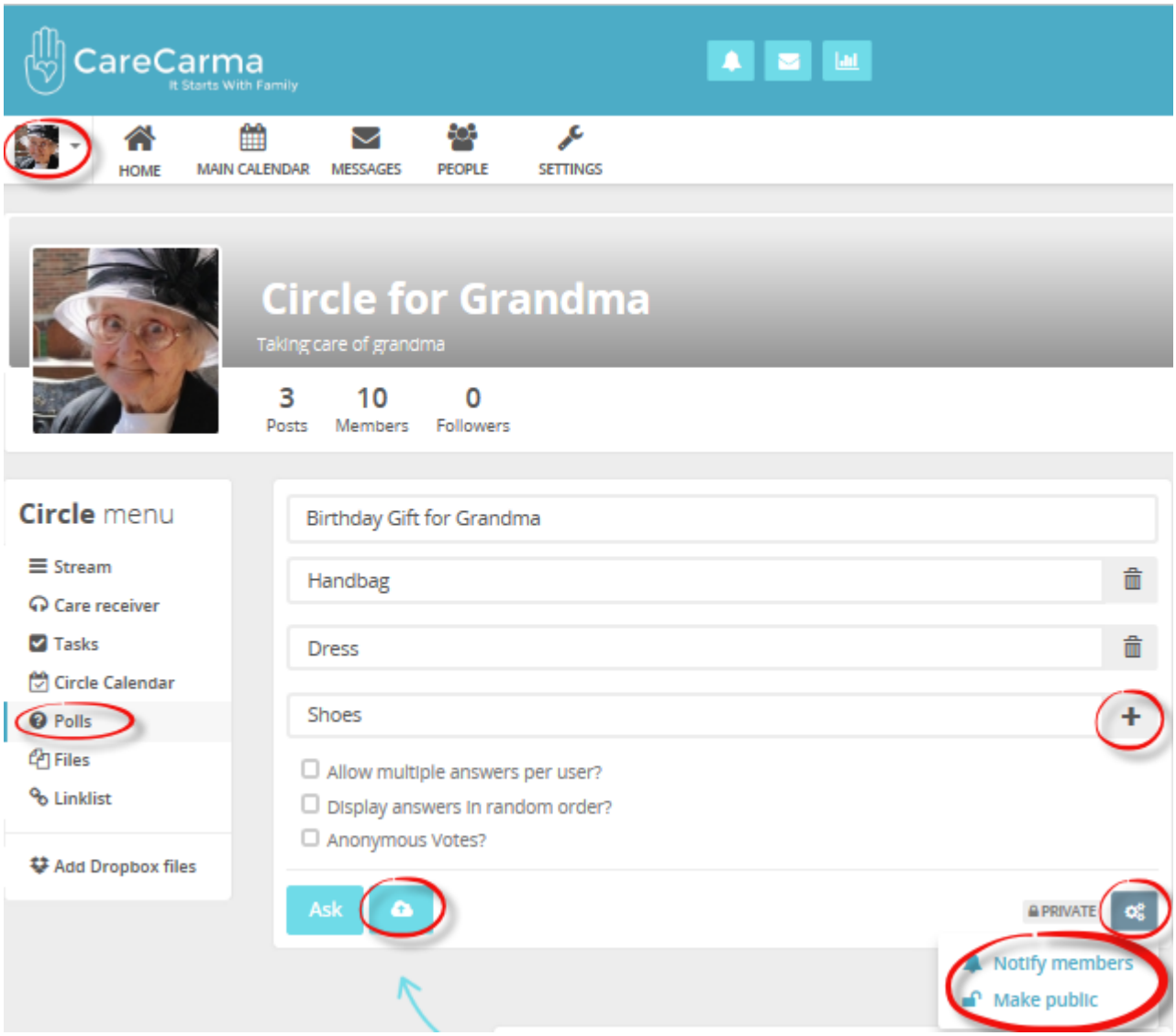
To create a new Circle Calendar event:




Select the **(Day)** of the event to access the **(Create Event)** pop up
In the **(Title)** section, enter a title description. E.g. Doctors Appointment
In the **(Description)** section, enter a description. E.g. Dr. Smith 123 Main St, Suite 406
Check the **(Is Public)** box to allow all CareCarma members to see the calendar entry or
Uncheck the **(Is Public)** box to allow only the CareCircle members to see the calendar entry
Check the **(All Day)** box if the event is scheduled for all day
In the **(Start Date)** section, enter the start date of the event in the format hh:mm
In the **(End Date)** section, enter the end date of the event in the format hh:mm
In the Participation Mode section:
Select **(No participants)** if you want other CareCircle members to NOT have the option to attend the event
Select **(Everyone can participate)** if you want other CareCircle members to have the option to attend the event
Select **(Save)** to create the calendar entry, you'll automatically be returned to the circle calendar where you'll see the new event
select **(Close)** if you don't want to save the calendar event


CareCarma
It Starts With Family
Kerry-Anne Wadwell
HOME
MAIN CALENDAR
MESSAGES
PEOPLE
SETTINGS
Circle for Grandma
Taking care of grandma
3 Posts
10 Members
0 Followers
+ Invite
Circle menu
Stream
Care receiver
Tasks
Circle Calendar
Polls
Files
Linklist
Add Dropbox files
today
June 2017
month week day
Sun Mon Tue Wed Thu Fri Sat
10a Doctors Appointment

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Polls




Selecting **(Polls)** in the Circle Menu allows you to answer questions or gather opinions from your CareCircle members
In the **(Ask something)** section, enter a question, statement or request, e.g. Birthday gift for Grandma
In the 1st **(Add answer)** section, enter an option or opinion, e.g. Handbag
In the 2nd **(Add answer)** section, enter another option or opinion, e.g. Dress
Select **(+)** to add another **(Add answer)** sections to the poll
In the new **(Add answer)** section, enter another option or opinion, e.g. Shoes
Repeat the last two steps to add more sections to the poll until you have included all the options or opinions
To delete an option or opinion, select the 🗑 **(delete)** icon adjacent the option or opinion you want to delete
Check the **(Allow multiple answers per user)** box, if members can select more than one answer
Do not check the **(Allow multiple answers per user)** box, if members can select only one answer
Check the **(Display answers in random order)** box, to not display answers in the same order you entered them
Uncheck the **(Display answers in random order)** box, to display answers in the same order you entered them
Check the **(Anonymous Votes)** box, to not see which members voted for which answers
Uncheck the **(Anonymous Votes)** box, to see which members voted for which answers

To add files to your poll:

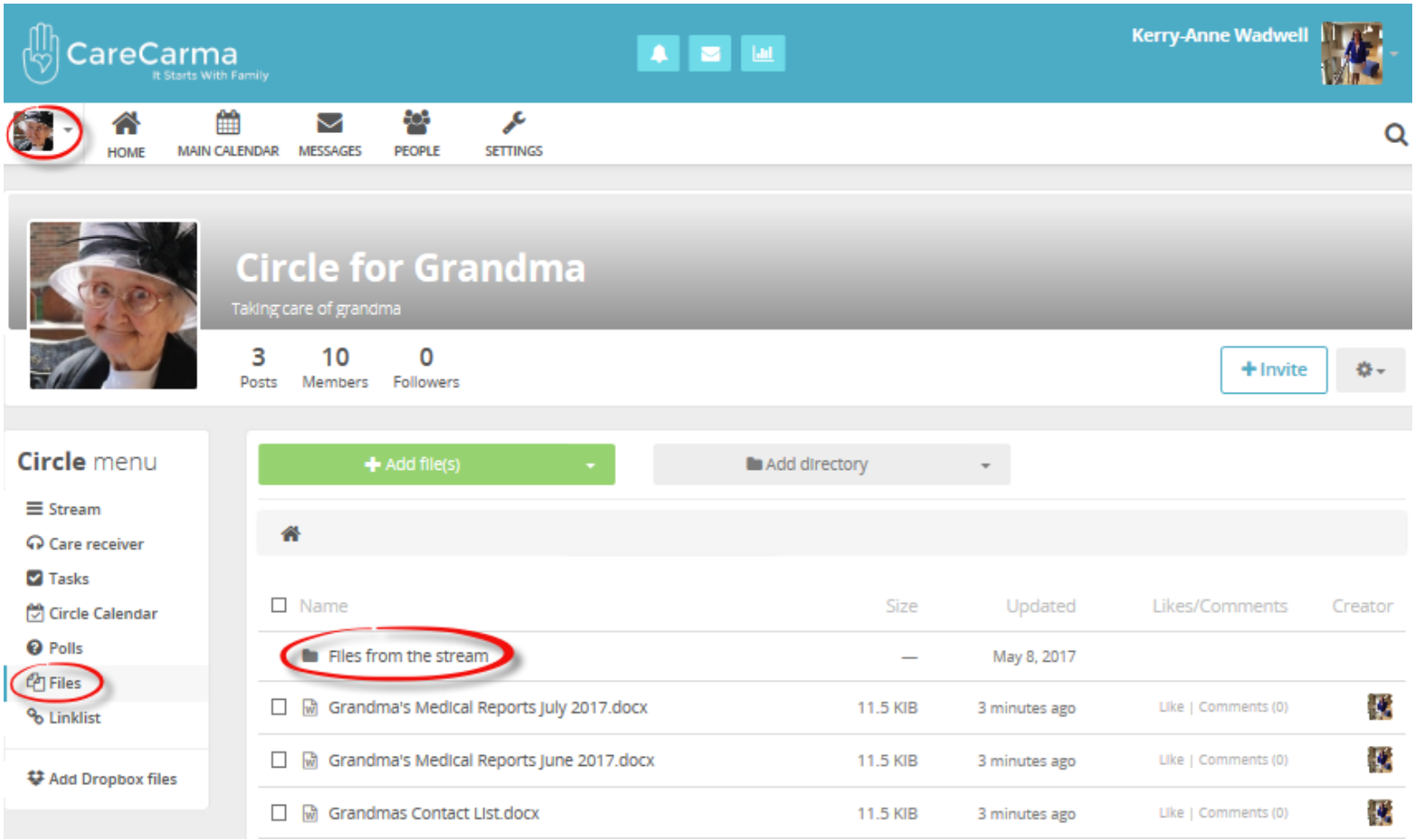
Select the **(upload image)** icon
Locate the file you want to attach
Select **(open)**

To **(Notify Members)** of a pending poll:
If you want to send a notification to members letting them know there is a poll pending
Select the ⚙ **(Gear Icon)**
Select **(Notify Members)**
Start typing a member's name
Select the member from the drop-down menu
Repeat the last two steps until everyone you want to send the notification to is included

To make the poll **(Private)** or **(Public):**
By default, the poll is set to (Private) to allow only this CareCircles members access
To change the poll to (Public) to allow CareCarma members access
Select the ⚙ **(Gear Icon)**
Select **(Make Public)**

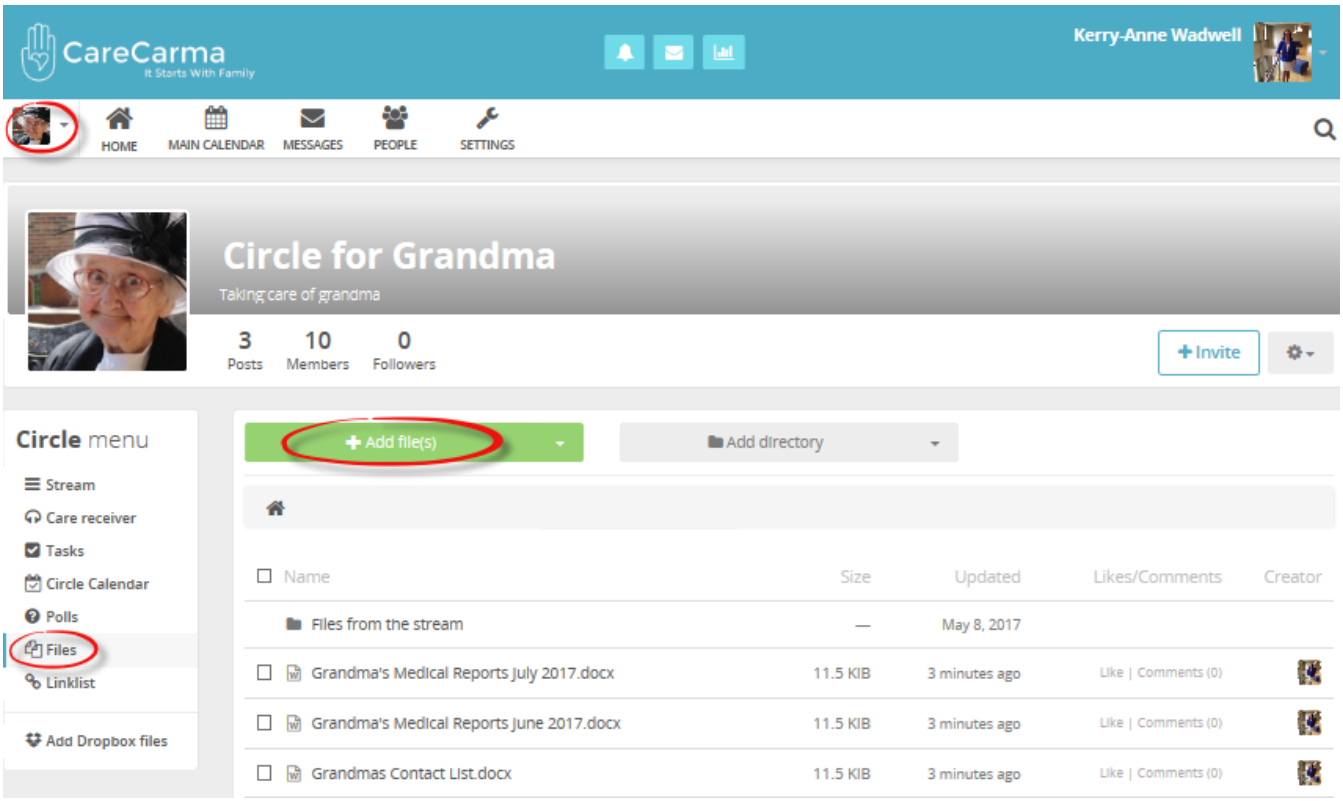
Select **(Ask)**, once the poll is ready to send out

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Files

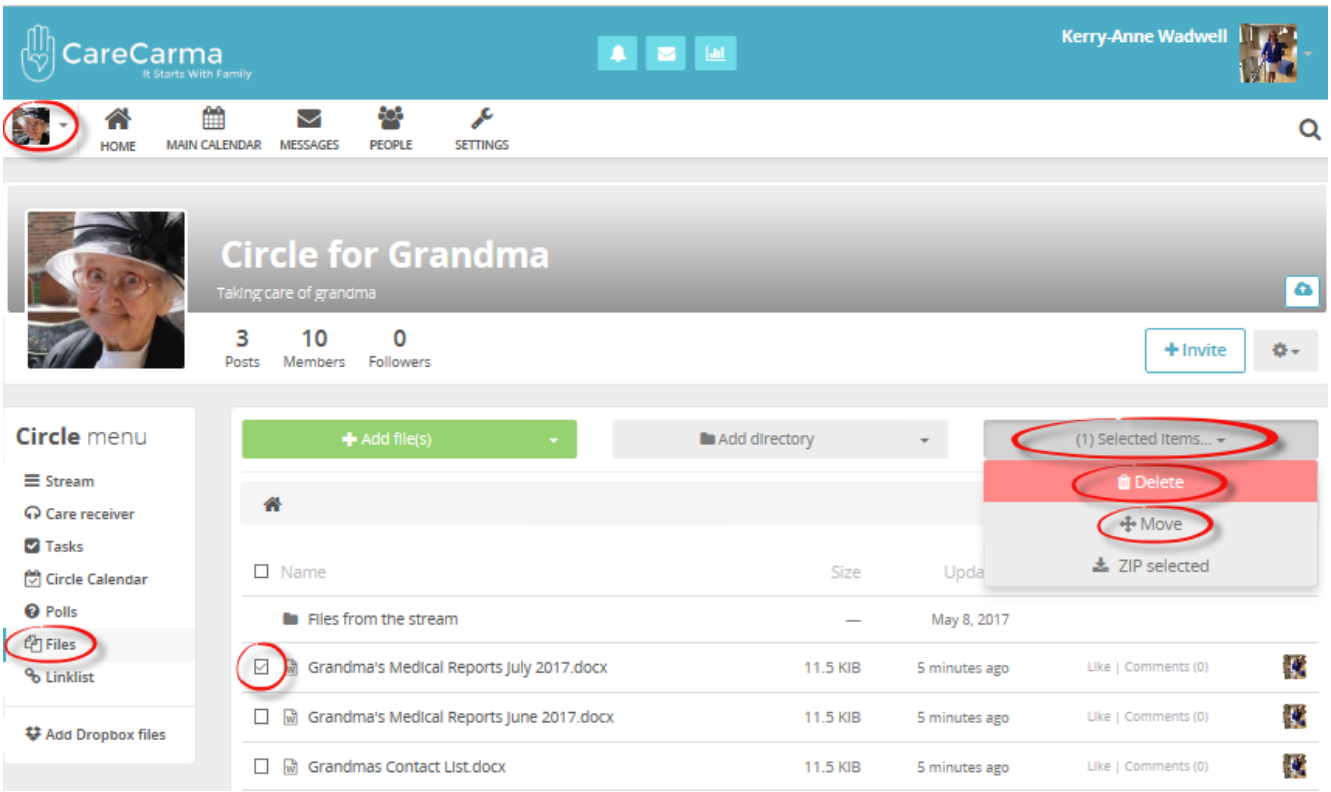



Selecting **(Files)** from the Circle Menu allows you to:
1. Access all files (from the stream) in one central location
2. Add files you want to share with this CareCircles members
3. Manage files added to this CareCircle
4. Create and manage directories to organize your files

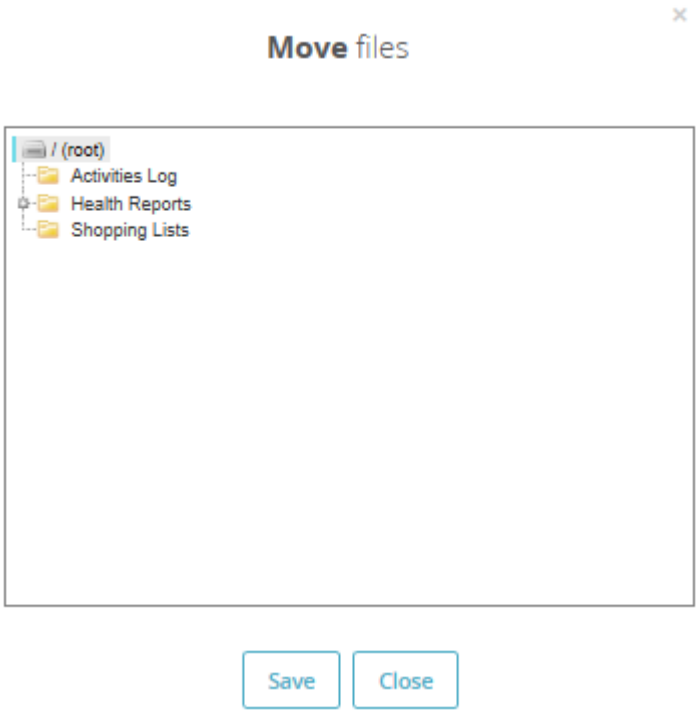
Files from the Stream:
Any files uploaded in the (Stream) will automatically be saved to the (Files from the Stream) section



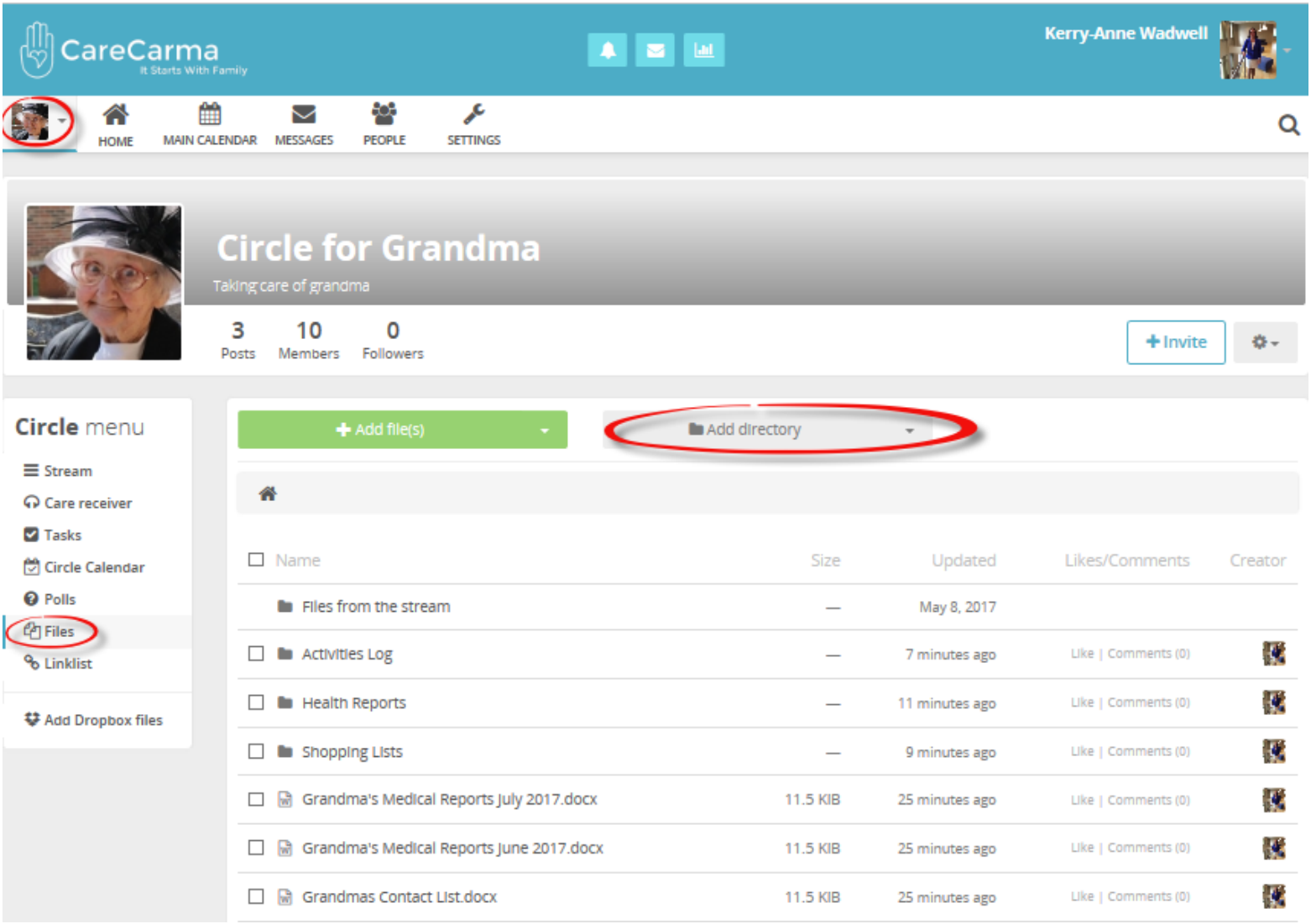

To Add Files:
Select **(+ Add files(s)**
Locate the file you want to add
Select **(open)**
Repeat these steps for each file you want to add



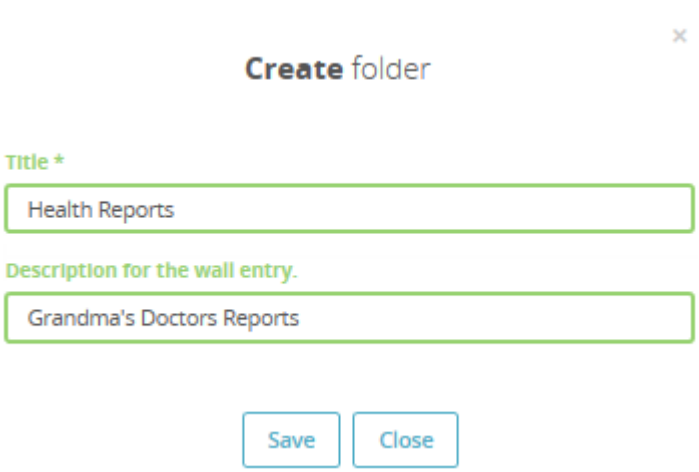

To Delete Files:
Check the box adjacent the file you want to delete
Select the **(Selected items)** section
Select**(Delete)**



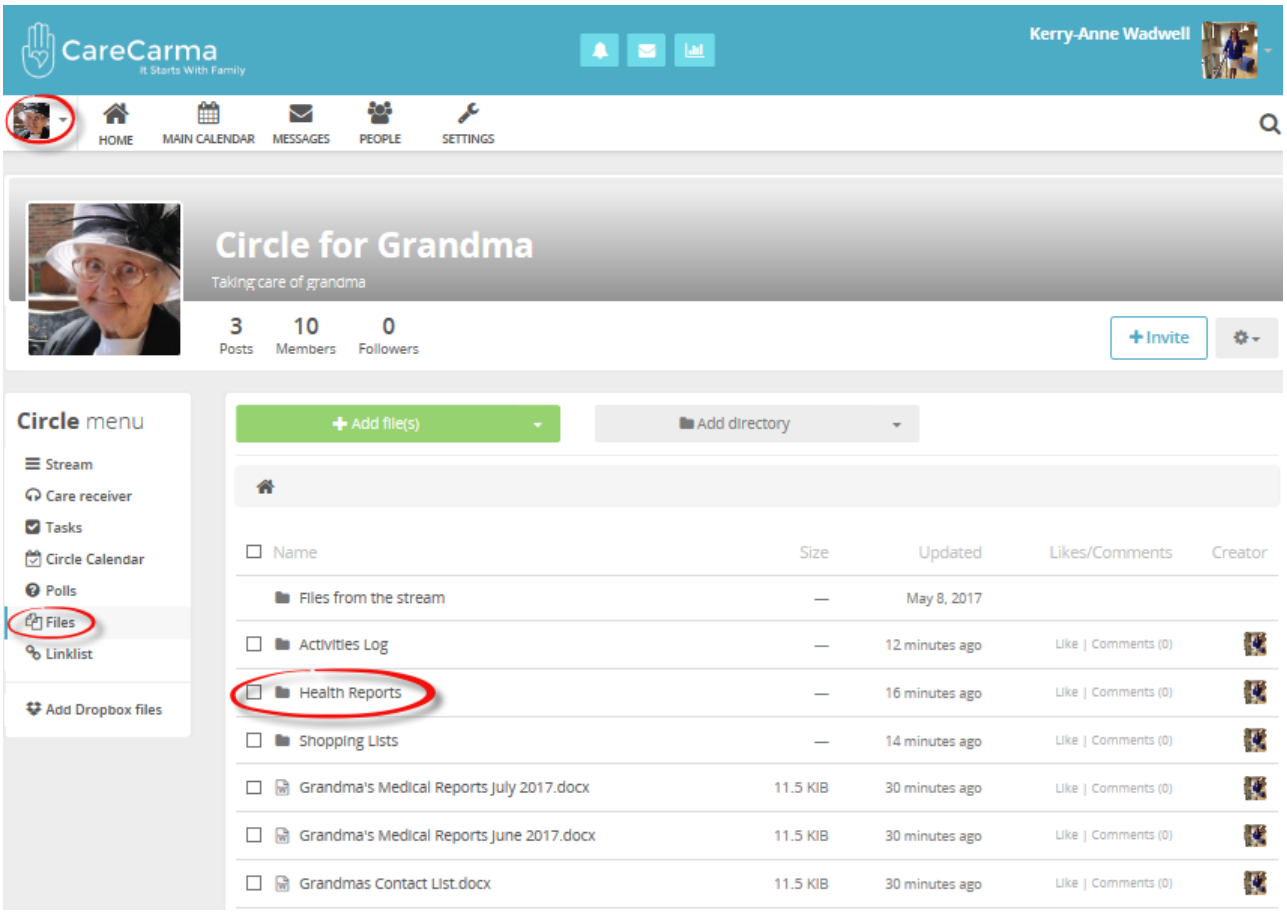

To Move Files:
Check the box adjacent the file you want to move
Select the **(Selected items)** section
Select **(Move)** to access the (Move files) pop-up
Select the location where you want the file moved to
Select **(Save)** to complete the move to the new location
Select **(Close)** to keep the file in the current location



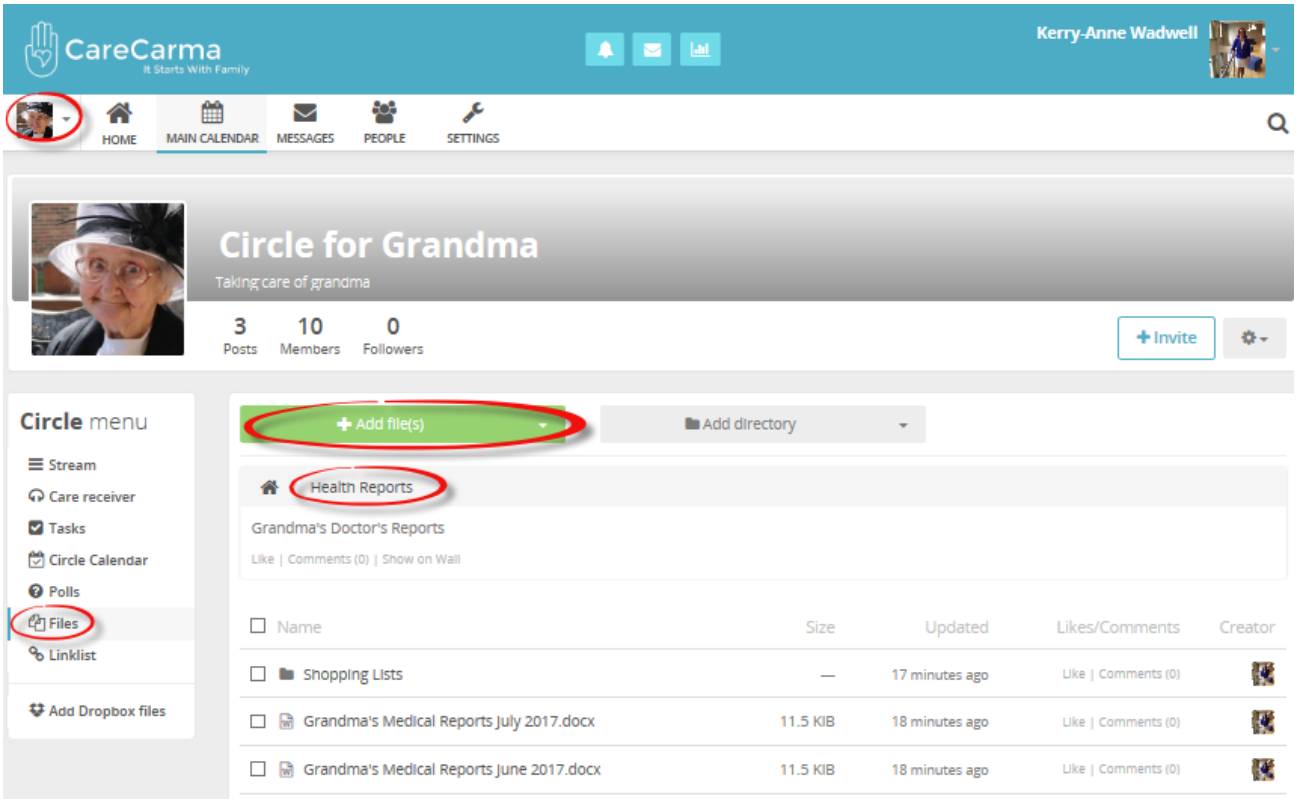

Directories can be used to organize your files into manageable categories, e.g. Health Reports, Shopping Lists
To add a directory:
Select **(+ Add directory)** to access the (Create folder) pop-up



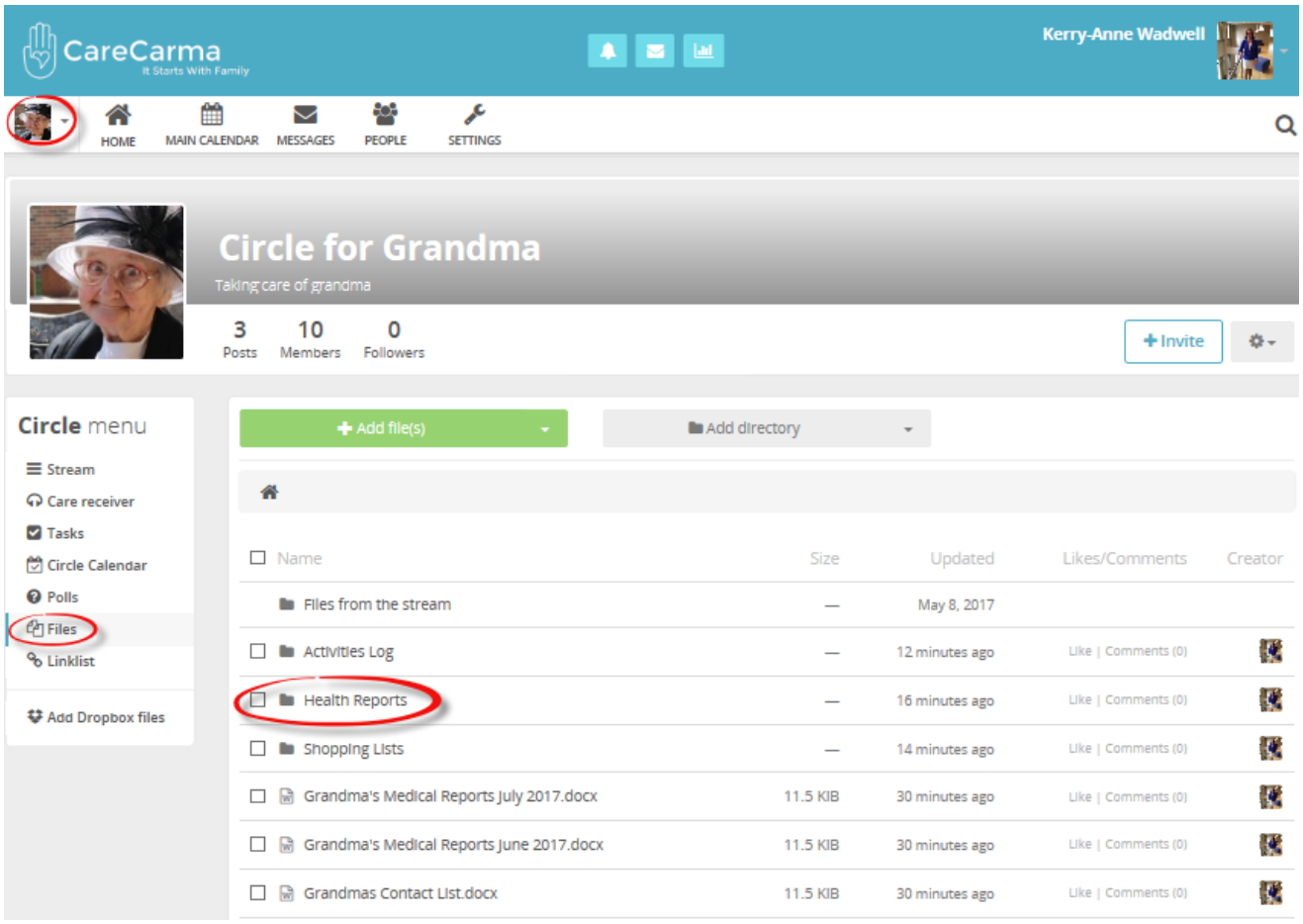

Enter a **(Title)** to name the directory, e.g. Health Reports
Optional: Enter a (Description for the wall entry)
Select **(Save)** to create the new directory
Repeat these steps for each directory you want to add
Select **(Close)** to not create the new directory



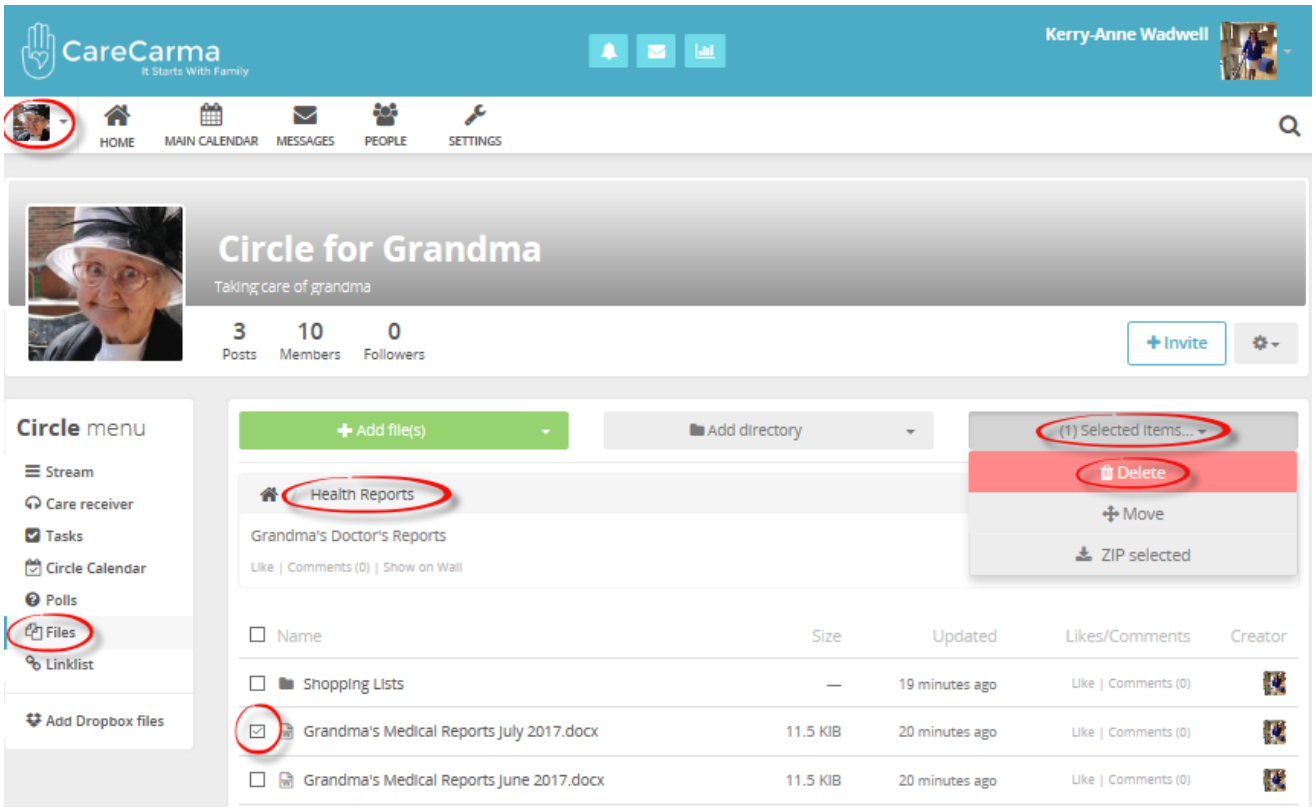

To add files to a directory:
Select the **(Directory)** you want to add files to




Select **(+ Add files(s)**
Locate the file you want to add
Select **(open)**
Repeat these steps for each file you want to add to this directory

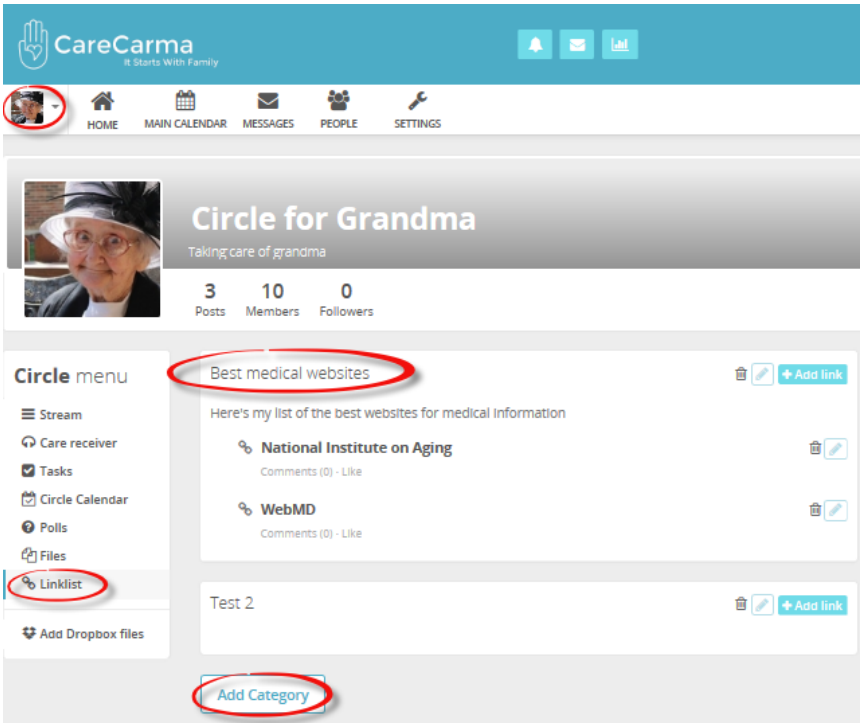



To Delete Files from a directory:
Select the **(Directory)** you want to delete files from



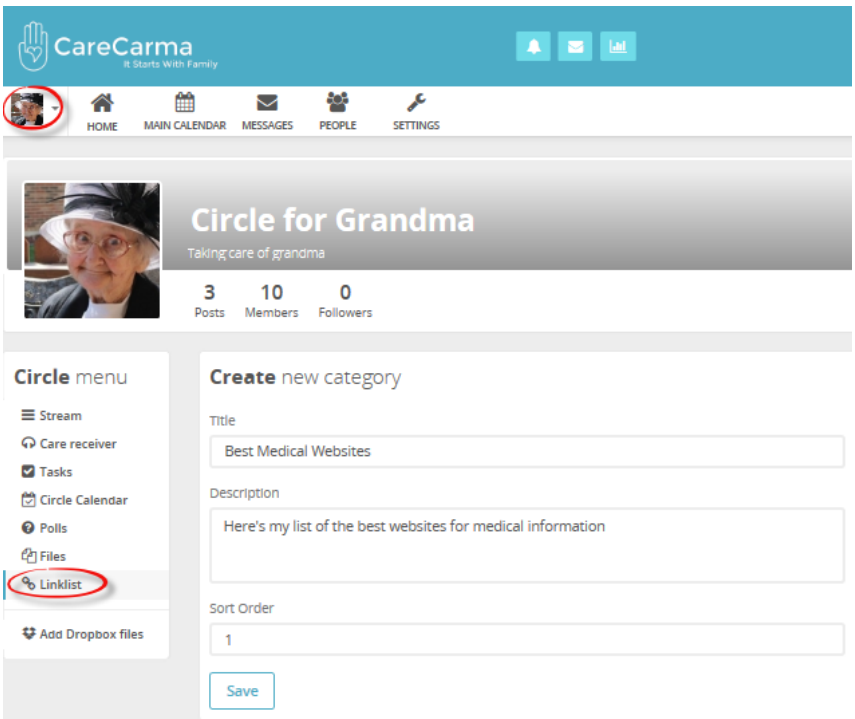

Check the box adjacent the file you want to delete
Select the **(Selected items)** section
Select**(Delete)**

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Linklist

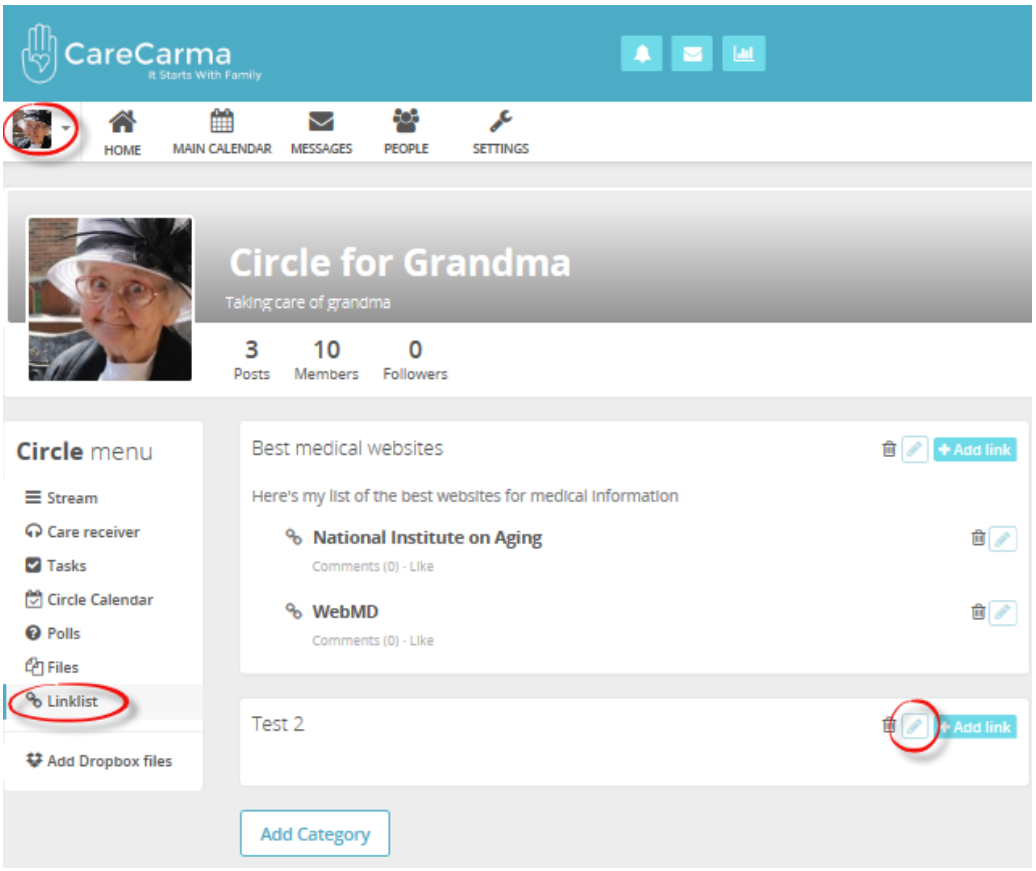



Selecting (Linklist) from the Circle Menu allows you to include links to articles that your CareCircle may find interesting
To add links to the Linklist you must first create a category

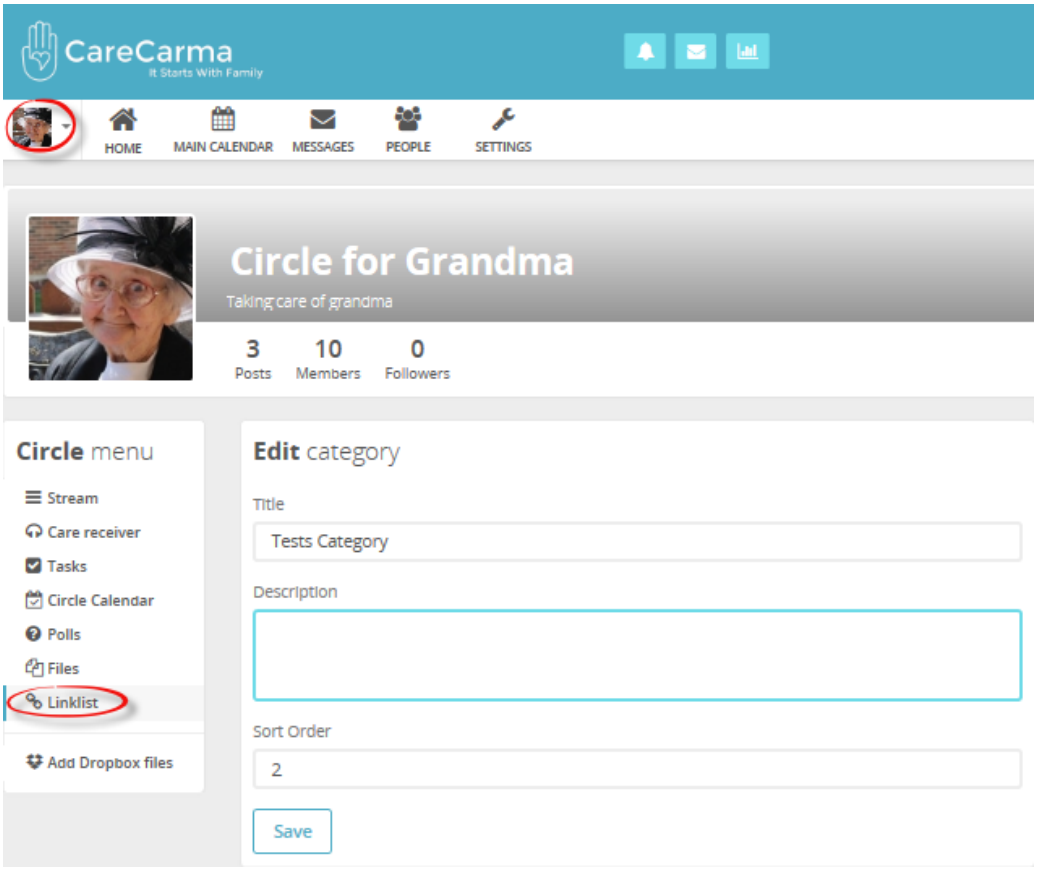
To add a category:
Select **(Add Category)** to access the (Create new category) pop-up



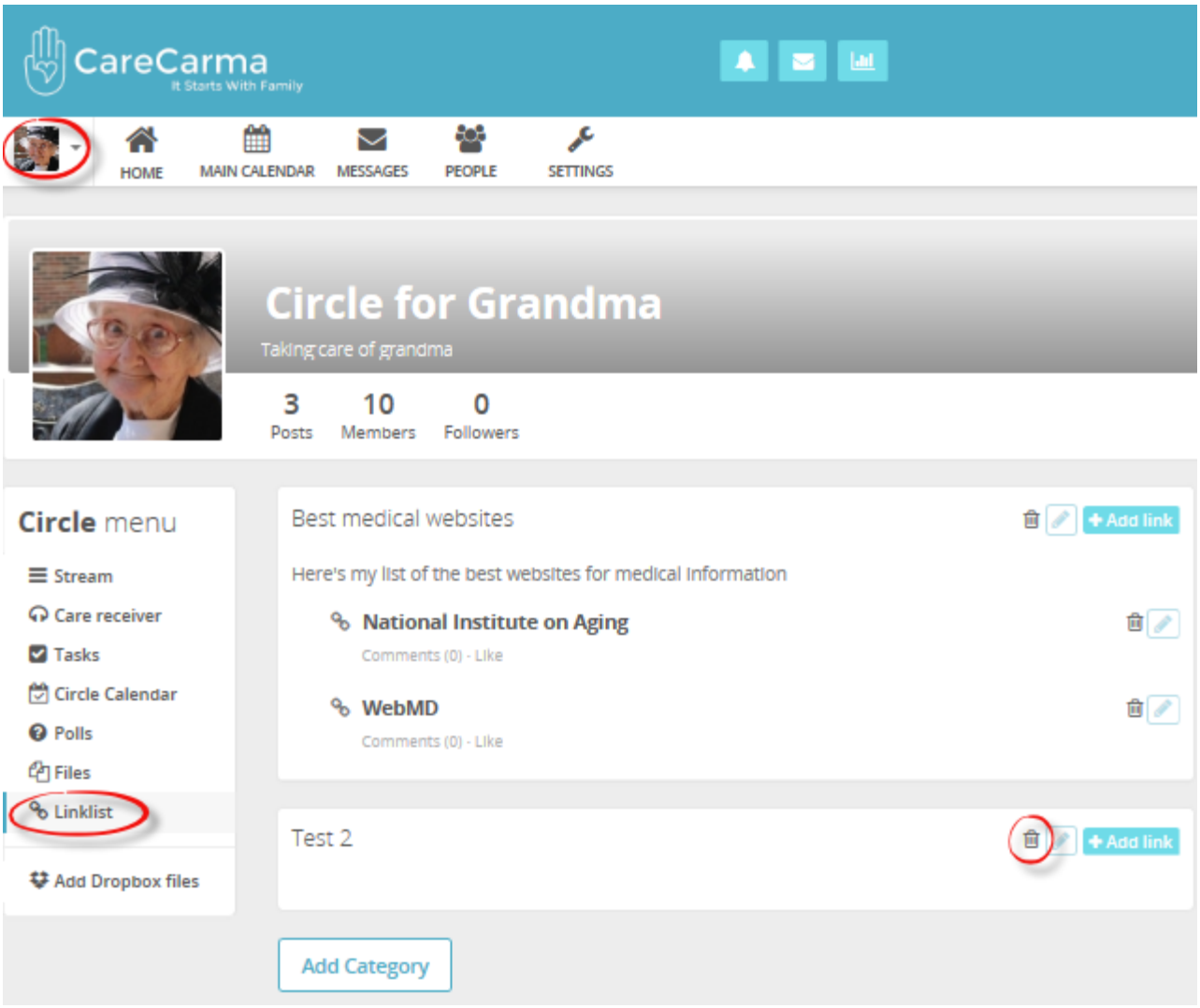

Enter a **(Title)** to name the category
Optional: Enter a (Description)
Optional: Enter a number to place the category in a particular order
Select **(Save)** to create the new category
Repeat these steps for each category you want to add
Select **(Linklist)** to not create the new category



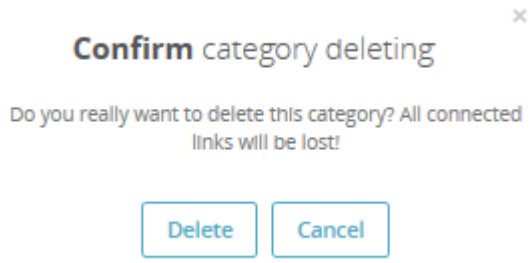

To Edit a category:
Select the ✎ (modify) icon adjacent the (category) you want to make changes to, to access the **(Edit category)** pop-up



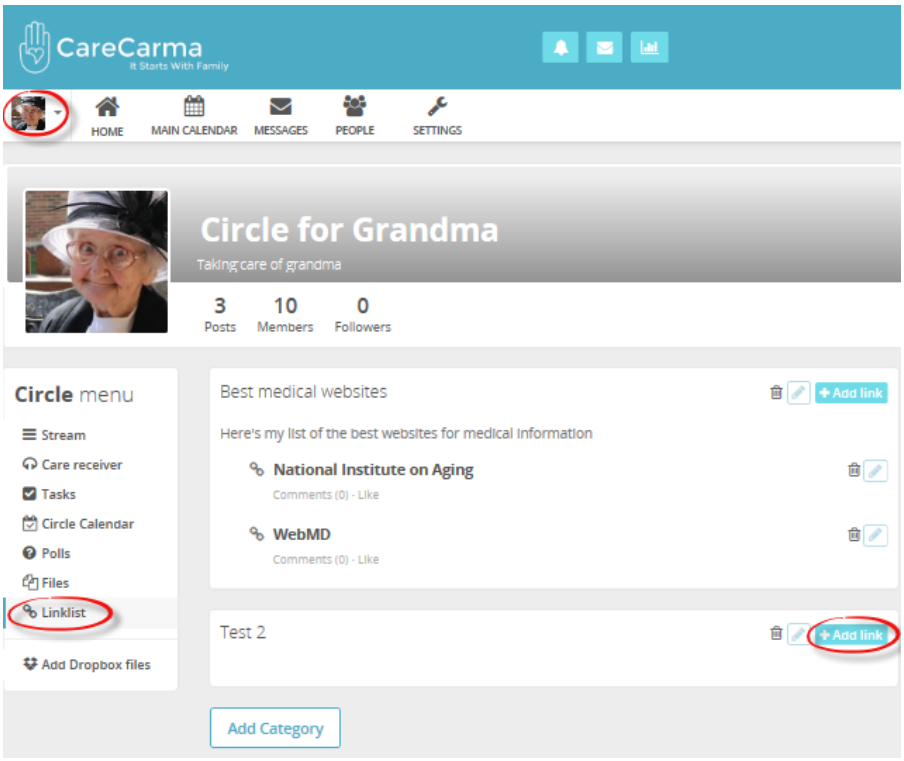

Make the appropriate changes to the (Title), (Description) or (Sort order)
Select **(Save)** to keep the changes
Select **(Linklist)** to disregard the changes



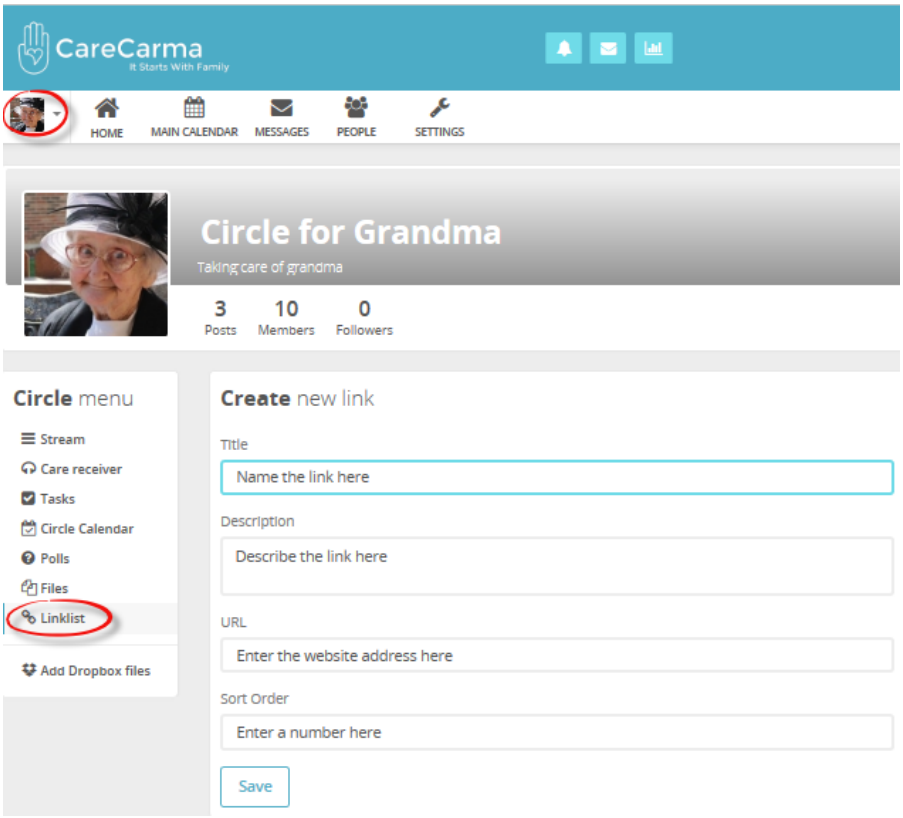

To Delete a category:
Select the 🗑 (delete) icon adjacent the (category) you want to delete to access the (Confirm category deleting) pop-up



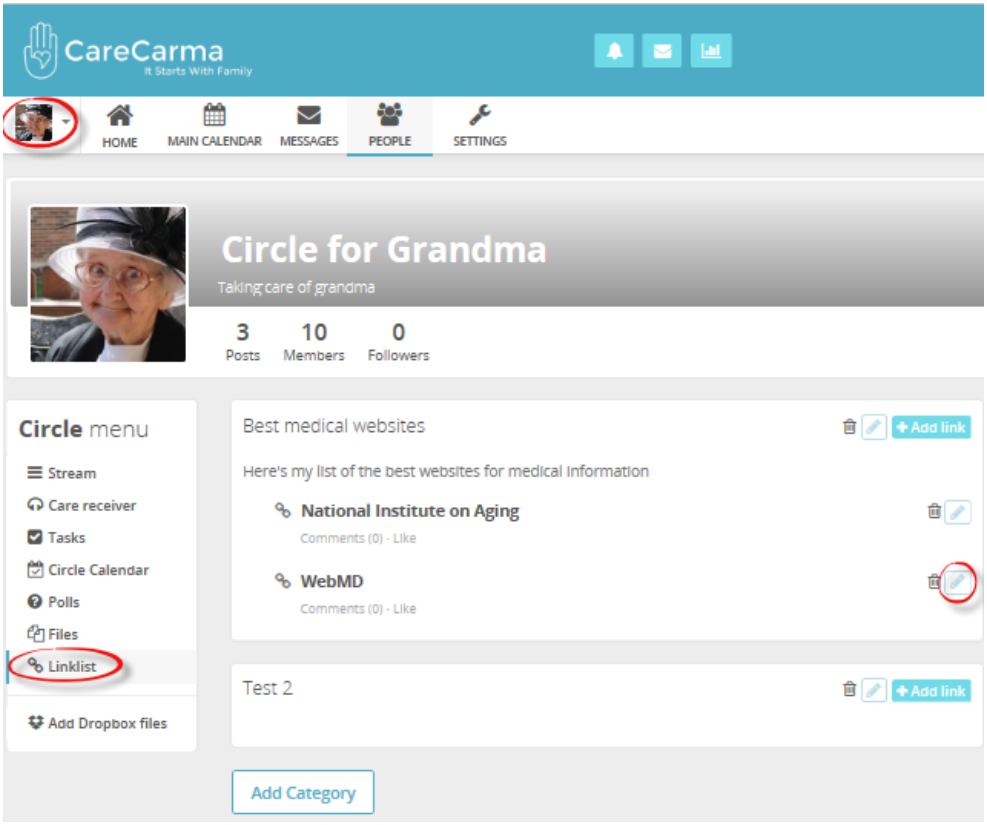

Select **(Delete)** to delete the category
Select **(Cancel)** to keep the category



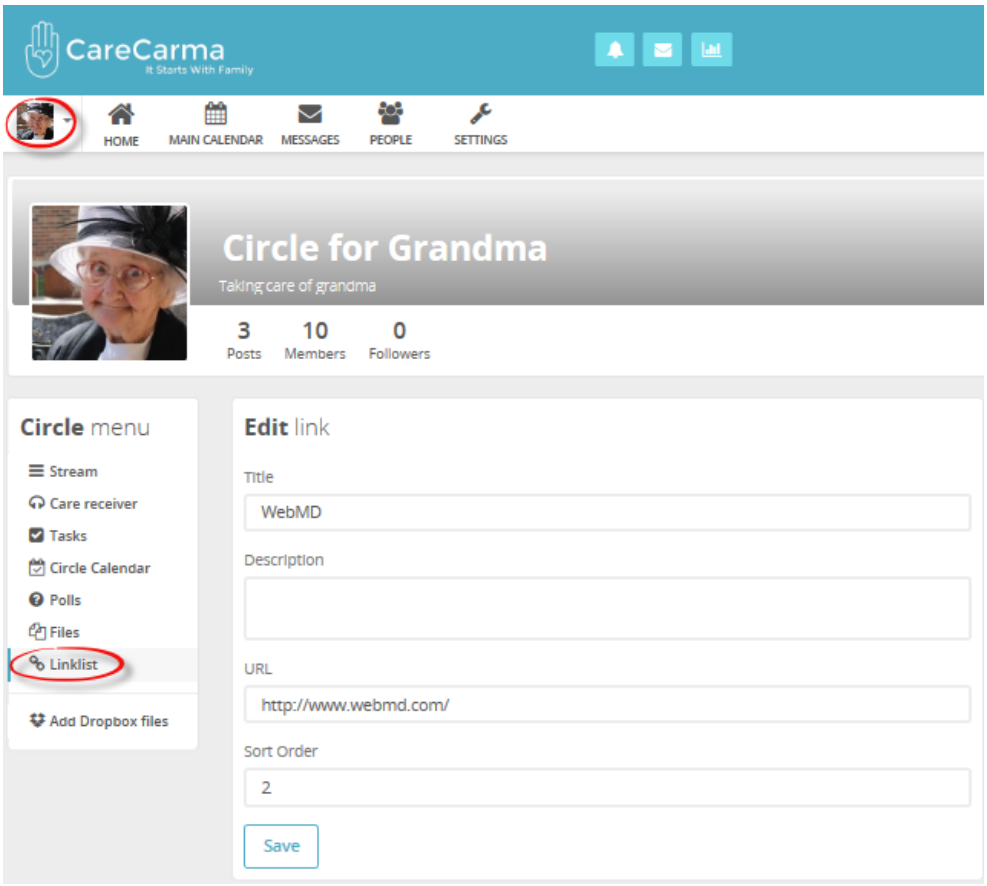

To add a link:
Select **(+ Add link)** to open the (Create new link) pop-up



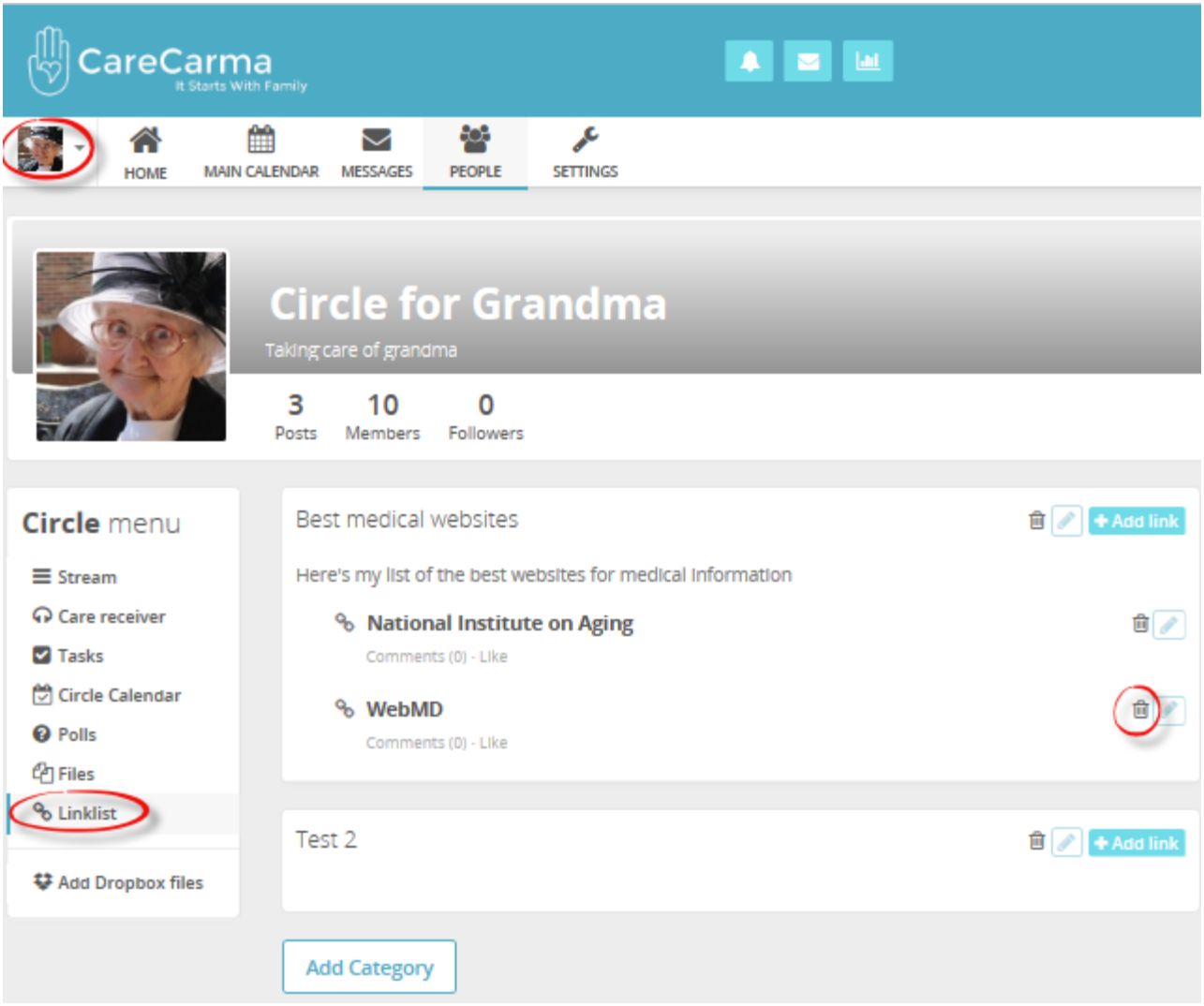

Enter a **(Title)** to name the link
Optional: Enter a (Description)
Enter the **(URL)** for the link
Optional: Enter a number to place the link in a particular order
Select **(Save)** to create the new link
Repeat these steps for each link you want to add
Select **(Linklist)** to not create the new link



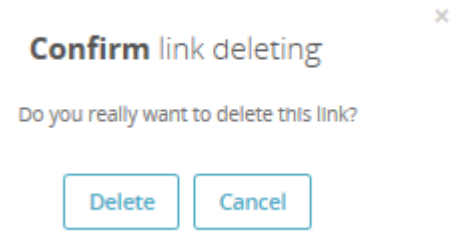

To Edit a link:
Select the (edit) icon adjacent the link you want to make changes to, to access the (Edit link) pop-up




Make the appropriate changes to the (Title), (Description), (URL) or (Sort order)
Select **(Save)** to keep the changes
Select **(Linklist)** to disregard the changes



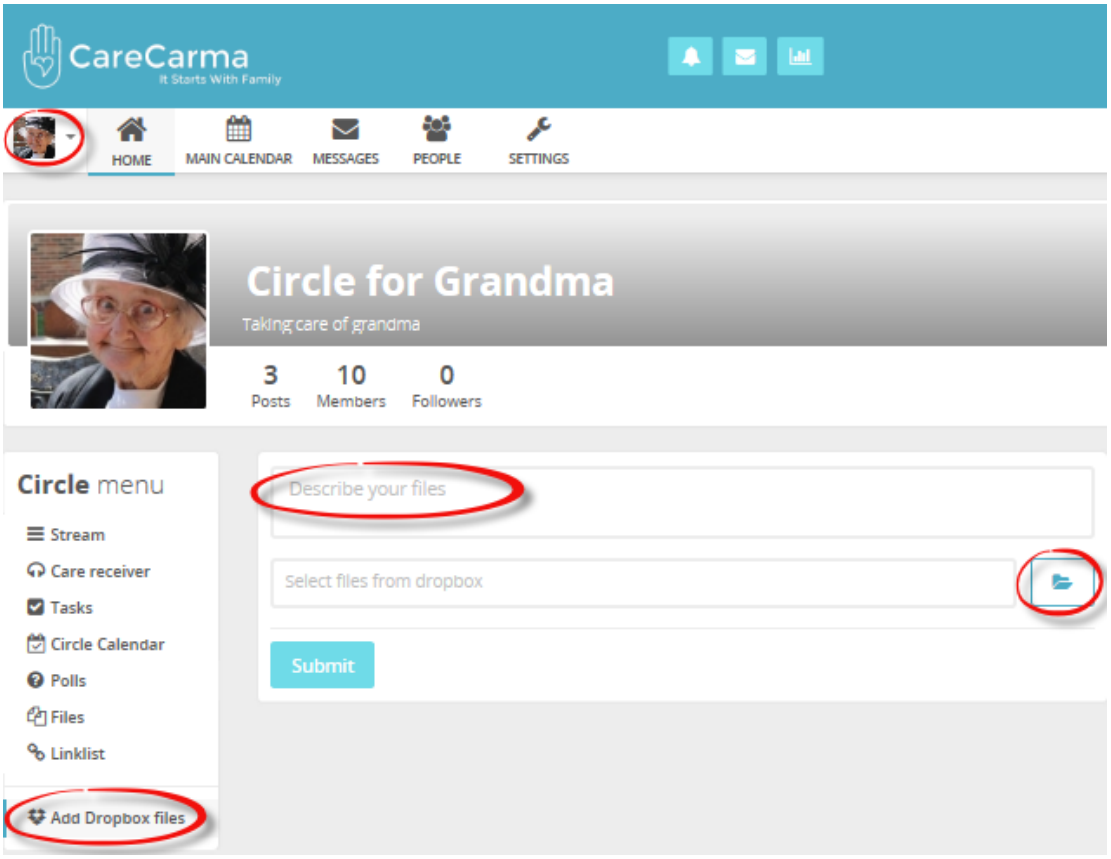

To Delete a link:
Select the 🗑 (delete) icon adjacent the link you want to delete to access the (Confirm link deleting) pop-up




Select **(Delete)** to delete the link
Select **(Cancel)** to keep the link

Menu Toolbar – My Circles – Select CareCircle – Circle Menu – Add Dropbox Files

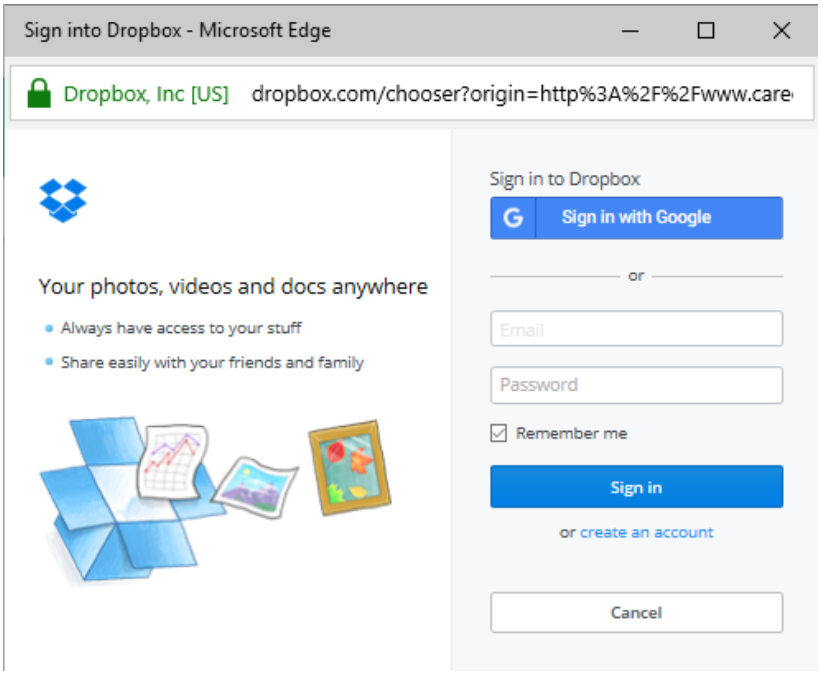
Selecting (Add Dropbox files) allows you to add files stored in a Dropbox to your CareCircle




To Add Dropbox files:

Enter a title or description in the **(Describe your files)** section

Select the Dropbox icon to access the Dropbox account where the file is located




Sign in to Dropbox

Locate the file you want to add

Select **(open)**

Repeat these steps for each file you want to add

Select **(Submit)** to add the file