



FACILITY OPERATIONS HANDBOOK

Care Scan End-User Guide

Step-by-step workflows for care staff, supervisors, Directors of Nursing, and administrators

Version 1.3 • September 2026 • Care Scan software 1.0.20 • Harborview Senior Living training example

Important: Care Scan records checkpoint activity; it does not prove care quality, replace clinical judgment, or replace facility emergency, downtime, privacy, or life-safety procedures.

[START HERE](#)

How to use this guide

Use the first section for daily work and the later sections for administrative tasks. Screens may vary slightly by role and software version; options that you are not authorized to use are hidden.

Quick start

Step 1 — Open Care Scan

On a facility computer or tablet, open the Care Scan address supplied by your administrator—normally <https://care-scan.local> on the facility network.

Step 2 — Sign in

Enter your facility email address and password. Never share an account or credential with another person.

Step 3 — Confirm context

Check the facility name, your name and role, the local-server status, and the current time before acting.

Step 4 — Choose the workflow

Use Overview for current status, Reports for review, Rounds and Checkpoints for configuration, Activity for audit history, and the administrator pages for access and hardware management.

Who can do what

Role	Typical work	Portal access
Staff	Perform assigned rounds on a scanner	No administrative portal
Supervisor	Monitor work and review exceptions	Overview, rounds, checkpoints, activity, reports
Director of Nursing	Configure operations, review outcomes, and manage delegated users	Supervisor access plus users and devices
Administrator	Manage access, networks, devices, and updates	All portal areas
Auditor	Review historical evidence	Activity and reports
Support	Authorized technical support	Access determined by facility policy

GUIDE MAP

Contents and screen conventions

- First-time appliance setup and sign-in
- Daily supervisor and Director of Nursing review
- Reports, rounds, checkpoints, and activity history
- Users, staff badges, scanners, networks, and software updates
- Dedicated Android scanner enrollment, updates, and re-registration
- Scanner workflow for staff, offline behavior, issue reporting, and shift handoff
- Troubleshooting, safety language, and escalation guidance

Screen conventions

- The header identifies the facility, local-server health, signed-in person, and role.
- The left navigation shows only the areas authorized for the current role.
- Blue buttons perform the primary action; pale blue notices confirm status; gold notices require extra care.
- Status words are deliberate: saved, queued, synchronized, acknowledged, and resolved are different states.
- Screenshots use synthetic prototype data and may differ slightly from the installed release.

Before following a procedure

- Confirm that you are in the correct facility and account.
- Read the full page and any notice before selecting a destructive or security-sensitive action.
- Use facility-approved escalation whenever this guide and current policy differ.

CARE SCAN WORKFLOW

First-time appliance setup

An administrator completes this browser wizard once after the appliance is connected to Ethernet and powered on.

The screenshot shows a web-based setup wizard for the 'CARE SCAN APPLIANCE'. The title is 'Set up Care Scan' with a subtitle 'Complete these steps once. The temporary setup network is disabled when setup finishes.' The wizard is divided into five numbered steps:

- 1. Confirm this appliance**: Shows the 'Hostname' as 'care-scan.local'.
- 2. Facility**: Includes fields for 'Facility name', 'Timezone' (set to 'Pacific Time'), and 'NTP server' (set to 'pool.ntp.org'). A note states: 'The scanner's device timezone rule is configured automatically.'
- 3. Scanner network**: Asks 'How should scanners connect?'. It has two options: 'Private scanner network' (selected, marked 'RECOMMENDED') and 'Facility Wi-Fi'. Below these are fields for 'Scanner network name' and 'Scanner network password' (with a 'Show' button). A note says: 'Enter the password exactly as provided; spaces are preserved. Scanner Wi-Fi must be available on the 2.4 GHz band. A dual-band network is supported when it uses the same name and password on 2.4 GHz.'
- 4. Administrator**: Includes fields for 'Your name', 'Email', 'New password' (with a 'Show' button), and 'Enter password again' (with a 'Show' button).
- 5. Appliance setup code**: Includes a field for 'Setup code' with a note: 'Enter the unique code printed on this appliance. There is no universal production password.'

At the bottom of the form is a button labeled 'Finish setup and disable temporary AP'.

First-time setup wizard. Use the appliance-specific printed setup code.

Step 1 — Confirm the appliance

Verify the displayed hostname and, when shown, the Ethernet or temporary setup address against the appliance label or installation record.

Step 2 — Enter facility settings

Enter the facility name, select the correct timezone, and keep the approved NTP time server. Correct time is essential for round windows and audit records.

Step 3 — Choose the scanner network

Use the private scanner network when the appliance has Ethernet. Use Facility Wi-Fi only when required; scanners need a 2.4 GHz network.

Step 4 — Create the administrator

Enter the named administrator's email and a unique password of at least 12 characters. Store recovery information according to facility policy.

Step 5 — Finish setup

Enter the unique setup code printed on the appliance, then select Finish setup and disable temporary AP. The temporary network shuts down after success.

Do not proceed: Stop and contact authorized support if the hostname, appliance label, or setup code does not match. Never substitute a universal or shared setup password.

CARE SCAN WORKFLOW

Recover an incorrect initial setup

Authorized service staff can reopen the setup wizard without erasing facility records when the scanner network or initial administrator sign-in was configured incorrectly.

CARE SCAN APPLIANCE RECOVERY

Reopen initial setup

Harborview Senior Living is already configured. Use the unique setup code printed on this appliance to correct its network or administrator sign-in.

This does not erase care records.
Facility data, audit history, backups, and enrolled scanners are preserved. Existing browser sessions are signed out, and completing setup replaces the sole administrator credentials.

Setup code from appliance sticker

☐ I understand that all users will be signed out and initial setup will reopen.

Confirm and reopen setup

[Cancel and return to sign in](#)

Setup recovery: the appliance-specific code and explicit acknowledgement are required.

Step 1 — Use a local service connection

Connect by Ethernet or authorized service USB. At the appliance, run `sudo /opt/care-scan/care-scan-network reset-setup` to restore setup-network access.

Step 2 — Open recovery

At the sign-in screen, select **Forgot the administrator password?** The recovery page identifies the configured facility and explains what will be preserved.

Step 3 — Confirm authorization

Enter the unique setup code printed on that appliance and select the acknowledgement that all users will be signed out and initial setup will reopen.

Step 4 — Reconfigure and verify

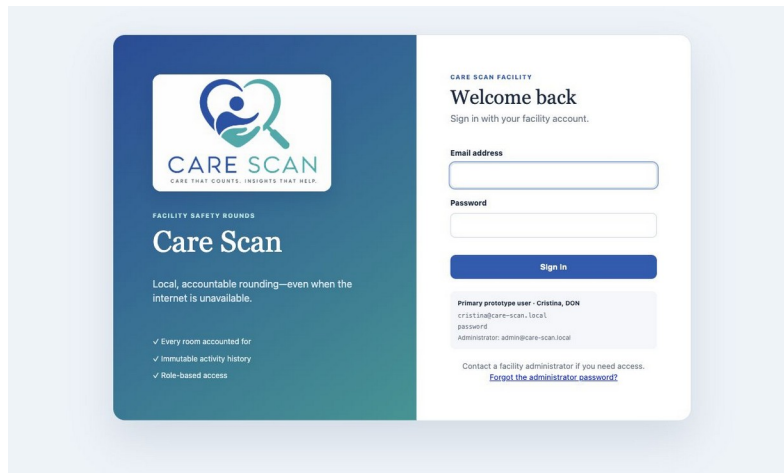
Complete the setup wizard with the corrected network and initial administrator details. Facility data, audit history, backups, and enrolled scanner identities remain in place; existing browser sessions are invalidated.

Security boundary: Recovery is deliberately local and appliance-specific. Do not expose the setup service on an untrusted network or share the appliance setup code.

CARE SCAN WORKFLOW

Sign in and verify your session

Every portal action is attributed to the signed-in user. Use only your own facility account.



Care Scan sign-in screen on the local facility server.

Step 1 — Open the portal

Open the facility's Care Scan address. If the page cannot be reached, confirm that you are on the facility network before escalating.

Step 2 — Enter credentials

Enter your email address and password, then select Sign in.

Step 3 — Verify the header

Confirm the facility name, your name and role, and Local server online. A red or missing status requires operational attention.

Step 4 — Sign out

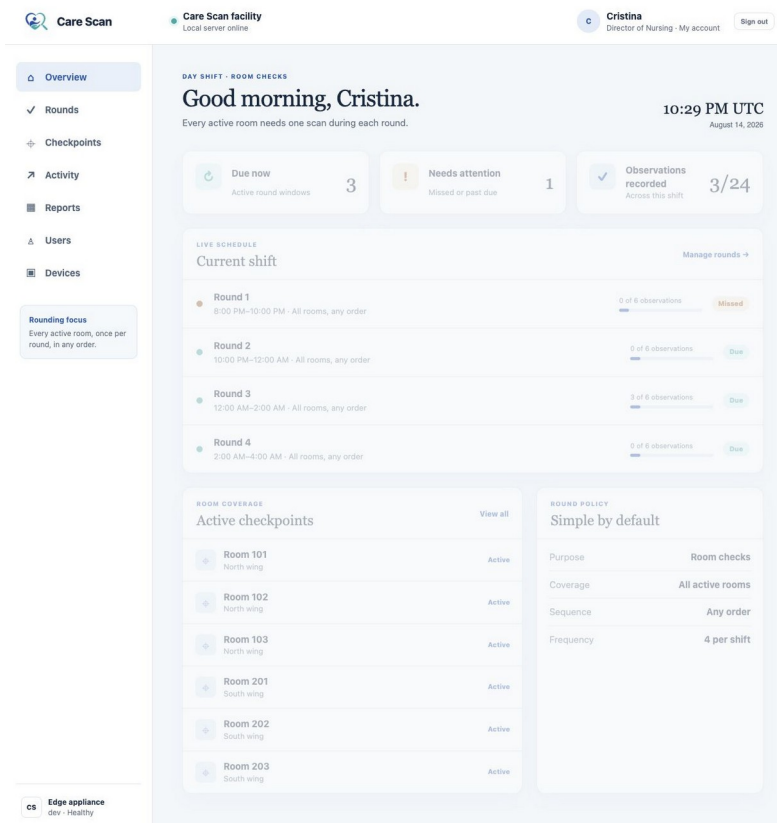
Select Sign out before leaving a shared workstation. Closing the browser alone may not end the session.

Access help: If you cannot sign in, contact a facility administrator. Repeated guessing may trigger a temporary logout.

CARE SCAN WORKFLOW

Daily status review

Overview gives supervisors, Directors of Nursing, and administrators a fast view of due work, missed windows, and room coverage.



Overview: live schedule, due work, attention count, and active checkpoints.

Step 1 — Confirm the shift

Read the greeting, date, local time, and shift label. If time or shift is wrong, stop configuration changes and notify an administrator.

Step 2 — Review Due now

Open the active round cards and compare observations recorded with total required observations. A room may contribute more than one required observation.

Step 3 — Review Needs attention

Investigate missed or past-due work. A missed checkpoint is an operational fact to review; it is not a diagnosis or automatic proof of omitted care.

Step 4 — Open the detail

Use Manage rounds, View all checkpoints, Activity, or Reports to identify the affected time window, room, device, and staff attribution.

CARE SCAN WORKFLOW

Reports workflow

Reports support daily review, date-range review, filtering, and PDF export. They use careful language such as checkpoint recorded and missed room.

Care Scan

Local server online

Cristina

Director of Nursing - My account

Sign out

Overview

Rounds

Checkpoints

Activity

Reports

Users

Devices

Rounding focus

Every active room, once per round, in any order.

DIRECTOR OF NURSING

Care Scan reports

Review up to one month of rounds, then select a date range for complete details.

Export PDF

Round completion

0%

0 of 336 room checks

Problem days

14

Missed or not-in-bed scans

Not-in-bed scans

0

Require review

Days reviewed

14

August 2026

MONTHLY OVERVIEW

August 2026

MON

TUE

WED

THU

FRI

SAT

SUN

27

28

29

30

31

1

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5

6

7

8

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21

22

23

24

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26

27

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31

1

2

3

4

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6

SELECTED DATE RANGE

From 08/14/2026 To 08/14/2026

Apply range

Friday, August 14, 2026

Staff member All staff

Apply

0 in bed 0 not in bed 24 missed

All Exclude missed Missed rooms Not in bed Completed

DATE

TIME

RESULT

ROOM

ROUNDS

STAFF

DETAILS

Aug 14, 2026

—

Missed

Room 101north wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 102north wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 103north wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 201south wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 202south wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 203south wing

Round 1

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 101north wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 102north wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 103north wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 201south wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 202south wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 203south wing

Round 2

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Aug 14, 2026

—

Missed

Room 101north wing

Round 3

Unassigned

Required observation 1 of 1 was not recorded before the round window closed.

Care Scan

Local server online

Cristina

Director of Nursing - My account

Sign out

DIRECTOR OF NURSING

Care Scan reports

Review up to one month of rounds, then select a date range for complete details.

Export PDF

Round completion

0%

0 of 336 room checks

Problem days

14

Missed or not-in-bed scans

Not-in-bed scans

0

Require review

Days reviewed

14

August 2026

MONTHLY OVERVIEW

August 2026

MON

TUE

WED

THU

FRI

SAT

SUN

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Page 11

Reports: monthly calendar, selected-date summary, filters, and export.

Step 1 — Select a month or day

Use the month arrows, then select a calendar day. Problem days show missed rooms or not-in-bed observations.

Step 2 — Set a date range

Enter From and To dates, then select Apply range. A range can cover up to one month.

Step 3 — Filter the log

Choose All, Missed rooms, Not in bed, or Completed. Optionally select a staff member and apply the filter.

Step 4 — Read each row

Confirm date, time, result, room, round, staff, and details. Treat Unassigned as a reconciliation task, not as permission to infer who performed the work.

Step 5 — Export

Select Export PDF for the current filters. Store or transmit exported reports only through facility-approved secure channels.

Interpretation: Not in bed is an observation selected by staff. A missed observation means a configured observation obligation was not recorded before the round window closed. Neither label is a clinical diagnosis.

CARE SCAN WORKFLOW

Configure rounds

Directors of Nursing and administrators can define the recurring room-check windows used by the facility.

Rounds: schedule settings and configured round windows.

Step 1 — Review the current schedule

Confirm the round names, start and end times, and expected observation count. Checkpoints requiring extra observations increase that total.

Step 2 — Add or edit a round

Select Add round or the available edit control, enter a clear name and non-overlapping time window, and save.

Step 3 — Generate the schedule

When schedule settings change, use the page's generation control only after confirming the intended effective period.

Step 4 — Validate downstream views

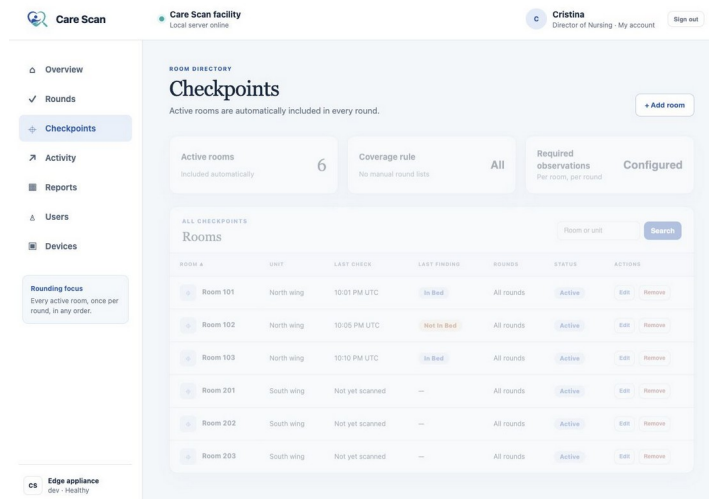
Return to Overview and Reports to confirm that expected counts and time windows are correct.

Change control: Schedule changes affect operational expectations and future reports. Coordinate changes with charge staff and document the effective time.

CARE SCAN WORKFLOW

Manage checkpoints and NFC tags

Checkpoints represent rooms or facility locations. NFC tags store an opaque identifier—not resident or clinical data.



Checkpoints: active room list with Edit and Remove actions, search, sorting, creation, and tag programming.

Step 1 — Find the location

Search by room or unit and confirm the status, last check, and last finding.

Step 2 — Add a checkpoint

Select Add room; enter the approved room or location name and unit; then set Required observations per round. One is the normal default. If repeat observations must be separated, enter the minimum minutes between observations; zero disables spacing.

Step 3 — Edit a checkpoint

Find the room in the table and select Edit in its Actions field. Change the room name, unit, required observations, or minimum spacing, then select Save checkpoint. Confirm the updated round total; completed and historical round expectations remain unchanged.

Step 4 — Program the tag

Select Program tag, choose the nearby authorized scanner if prompted, and follow the scanner instructions. Apply the physical label only after successful confirmation.

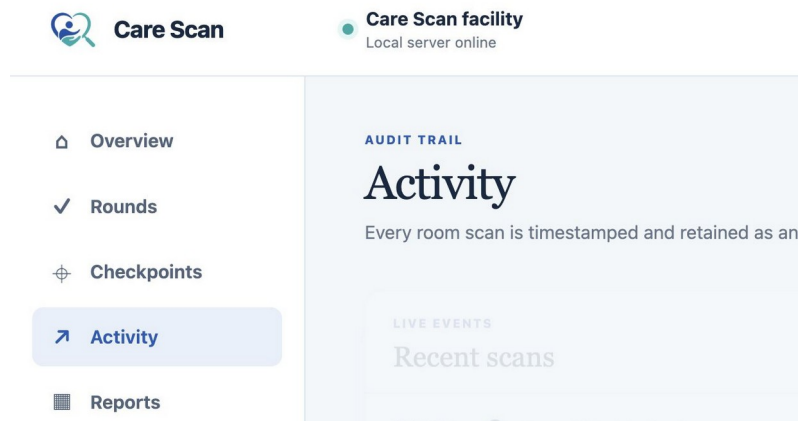
Step 5 — Test and govern the checkpoint

Perform an authorized test scan and confirm the room and unit before service. Unknown, duplicate, retired, malformed, or wrong-facility tags never count; never encode sensitive data. Remove an unused location and restore it only after confirming its tag and schedule. Approved observation-policy changes apply prospectively; historical expectations remain unchanged.

CARE SCAN WORKFLOW

Review activity history

Activity provides a timestamped view of scan events and observations for operational review.



Activity: chronological checkpoint events and attention filters.

Step 1 — Choose the filter

View all events, attention items, or clear events according to the question you are investigating.

Step 2 — Check attribution

Compare the event time, room, staff member, round, device, result, and observation.

Step 3 — Correlate, do not overwrite

Use Reports and the device audit history to reconcile discrepancies. Preserve the original facts and use explicit follow-up records.

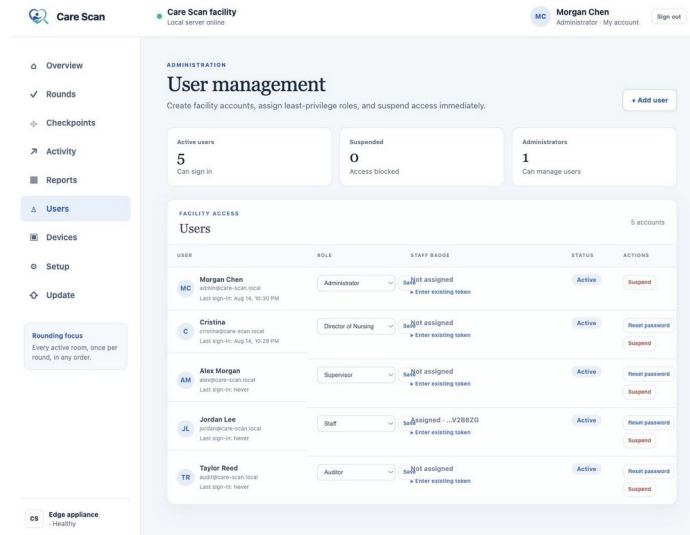
Step 4 — Escalate appropriately

Follow facility policy for urgent observations, suspected privacy incidents, missing devices, or unexplained gaps.

CARE SCAN WORKFLOW

Manage users and staff badges

Directors of Nursing can create and reset credentials for users at or below DON access; administrators retain the broader account controls.



User management: delegated account creation, credentials, roles, badges, status, and actions.

Step 1 — Add a user

Enter the person's name and unique email, choose the least-privilege role, and save. A DON may create Staff, Supervisor, or DON accounts; Administrator, Auditor, and Support require an administrator. Deliver the initial password privately.

Step 2 — Program a staff badge

For a staff account, select Program tag and choose the scanner if more than one is available. Present the correct physical badge to that scanner and wait for success.

Step 3 — Change a role

Administrators select the new role and then Save. Confirm the person's job requirement before granting broader access.

Step 4 — Reset another user's password

After verifying identity, a DON may reset a Staff, Supervisor, or DON password; administrators may reset any other user. You cannot reset your own password here—select your name and use My account. Deliver the temporary credential privately and require prompt replacement.

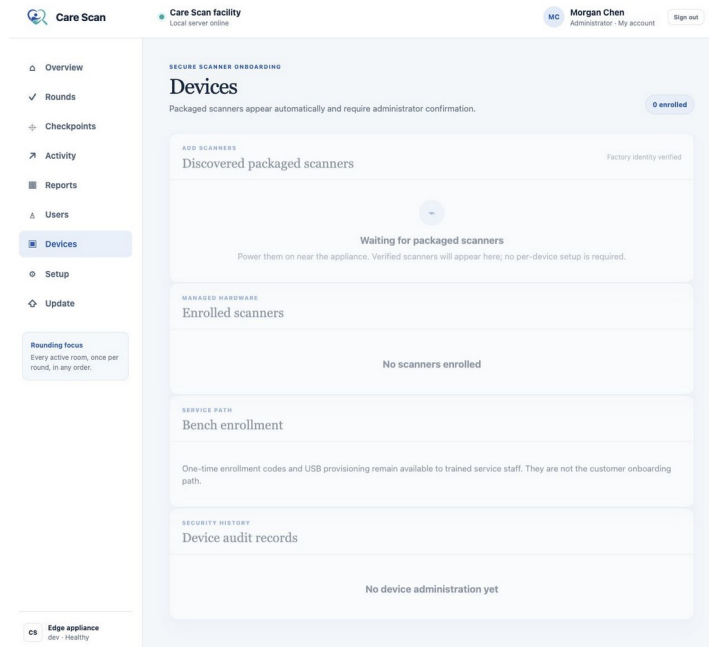
Step 5 — Suspend access

Select Suspend when a person leaves, changes duties, or access may be compromised. Suspension blocks sign-in without deleting historical attribution. Never reuse an account or badge for another person.

CARE SCAN WORKFLOW

Enroll and maintain scanners

Packaged scanners advertise a manufacturer-certified identity but remain pending until an administrator verifies the printed serial.



Devices: discovered scanners, enrolled inventory, maintenance, reassignment, and audit history.

Step 1 — Power on nearby

Power on the packaged scanner near the appliance and wait for it to appear under Discovered packaged scanners.

Step 2 — Verify the serial

Compare the displayed serial with the printed label, then type the printed serial exactly. Add a clear label and assignment such as North Wing Cart.

Step 3 — Approve

Select Approve scanner and keep the scanner powered on nearby while Bluetooth provisioning completes.

Step 4 — Confirm active status

Verify that the scanner appears in Enrolled scanners, reports Active, and shows a recent Last seen time.

Step 5 — Maintain or reassign

Use Retry sync for a known synchronization problem. Clear local scans only under trained support direction after confirming server receipt and backup; this can remove the recovery copy. Save assignment changes explicitly.

Step 6 — Revoke when necessary

Revoke a lost, retired, transferred, or suspect scanner promptly. Revocation stops future trusted use while preserving historical records.

CARE SCAN WORKFLOW

Manage dedicated Android scanners

Dedicated Android scanners are facility-bound kiosk devices. Administrators enroll them with a signed setup QR, update the scanner application from the local portal, and use authorized USB maintenance only for provisioning or local recovery.

Step 1 — Provision the device

Authorized service staff install the dedicated scanner and kiosk manager APKs over USB and complete device-owner provisioning. The device opens in Care Scan lock-task mode; staff cannot add another facility or remove the facility from the scanner UI.

Step 2 — Enroll by setup QR

In Devices, select Add scanner and choose Add a dedicated Android scanner. Generate the short-lived setup QR, then select Scan setup QR on the dedicated phone. The signed payload supplies the facility Wi-Fi profile, trusted server address, and one-time enrollment code.

Step 3 — Confirm the record

Verify the facility name, pairing status, installed scanner version, battery state, and recent check-in. Keep the device assigned to the facility until an administrator revokes it and authorized service staff reset it for re-registration.

Step 4 — Update from the portal

Use Updates to upload the approved dedicated scanner APK and target only the intended device. The manager checks appliance identity, package name, signing certificate, version, digest, and increasing version code before installation. An installation restarts Care Scan and reports its final state.

Step 5 — Re-register safely

When a device changes facilities, revoke it in the old facility first. Authorized service staff run the local reset procedure to clear pairing and the saved Wi-Fi profile while preserving kiosk ownership. The receiving facility then generates a fresh setup QR. Do not treat a queued update or a failed installation as proof that the device is ready for service.

Pilot boundary: Dedicated Android behavior depends on the validated device model and OEM settings. Follow `mobile/DEDICATED_ANDROID_OPERATIONS.md` for USB access, reboot behavior, update recovery, and physical-device acceptance.

CARE SCAN WORKFLOW

Publish scanner network and time settings

Administrators use Setup to publish facility, timezone, NTP, and network settings to enrolled scanners.

The screenshot displays the 'Setup' page in the Care Scan interface. The left sidebar contains navigation links: Overview, Rounds, Checkpoints, Activity, Reports, Users, Devices, Setup (highlighted), and Update. Below these is a 'Rounding focus' section stating 'Every active room, once per round, in any order.' The main content area is titled 'SERVER AND SCANNERS' and 'Setup', with a subtitle 'Publish network and time settings to enrolled scanners.' and a badge indicating '0 enrolled scanners'. The 'FACILITY CONFIGURATION' section for 'Care Scan facility edge server' includes fields for Facility name (pre-filled with 'Care Scan facility'), Timezone (set to 'Pacific Time'), NTP server (pre-filled with 'pool.ntp.org'), Scanner network (set to 'Appliance-managed private network'), Scanner Wi-Fi name, and Scanner Wi-Fi password. A 'Save scanner configuration' button is at the bottom of this section. The 'ADD HARDWARE' section, titled 'Enroll a scanner', has a 'Scanner label' field (pre-filled with 'Scanner 01') and a 'Generate enrollment code' button. Below this is the 'HARDWARE INVENTORY' section, titled 'Enrolled scanners', which shows 'No scanners enrolled' and a note to 'Generate a code to connect the first handheld.' A status bar at the bottom left shows 'cs Edge appliance dev - Healthy'.

Setup: facility configuration and scanner inventory.

Step 1 — Review facility and time

Confirm the facility name, timezone, and approved NTP server. Incorrect time can place valid scans in the wrong round window.

Step 2 — Choose the network model

Prefer Appliance-managed private network when Ethernet is available. Facility Wi-Fi fallback must offer 2.4 GHz service.

Step 3 — Enter Wi-Fi settings

Enter the approved network name. Leave the password blank only when the page explicitly says that doing so keeps the current password.

Step 4 — Save and monitor

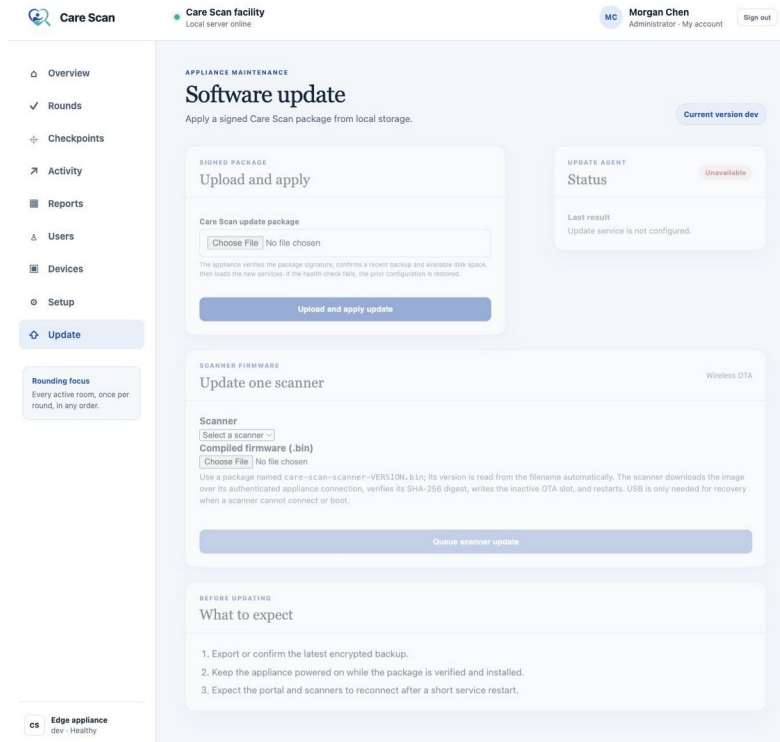
Save scanner configuration, keep the old network available during a migration, and confirm that every scanner checks in with the new configuration.

Network changes: Do not remove the old scanner network until all enrolled scanners report the new configuration. Guest Wi-Fi often blocks device-to-device communication.

CARE SCAN WORKFLOW

Apply software and scanner updates

Administrators can install signed appliance packages, update packaged scanners, and queue dedicated Android scanner APK updates.



Software update: signed appliance packages, update status, and scanner firmware OTA.

Step 1 — Confirm a backup

Export or confirm the latest encrypted backup and verify adequate free space.

Step 2 — Choose the signed package

Select the approved .csu appliance package. Never rename or install an unverified package received through an unapproved channel.

Step 3 — Upload and apply

Select Upload and apply update. Keep the appliance powered on while signature, backup, disk, and health checks run.

Step 4 — Verify recovery

After the short restart, sign in again and confirm the current version, server health, scanner connectivity, and representative reports.

Step 5 — Update a dedicated Android scanner

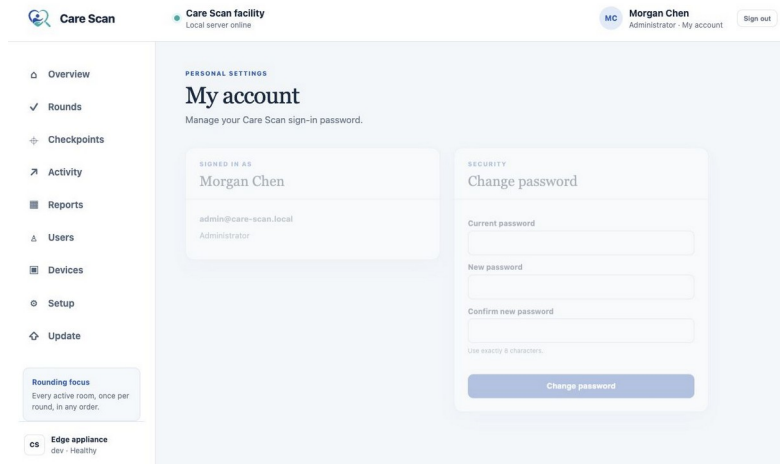
Use the dedicated APK upload and target controls described in Manage dedicated Android scanners. The dedicated manager installs only a verified higher version; it does not downgrade or silently roll back a committed installation.

Failed update: Do not repeatedly upload packages. Record the status message, preserve the package, and follow the authorized recovery procedure.

CARE SCAN WORKFLOW

Manage your account

Each portal user can review their account and change their own password.



My account: identity details and password change.

Step 1 — Open My account

Select your name in the portal header.

Step 2 — Verify identity

Confirm the displayed name, email, and role. Report discrepancies to an administrator.

Step 3 — Change password

Enter the current password, then enter and confirm a new unique password that meets facility requirements.

Step 4 — Finish safely

Confirm the success message and sign out before leaving a shared device.

CARE SCAN WORKFLOW

Staff scanner workflow

The handheld workflow is designed to save each event locally before synchronization. Visible offline state distinguishes saved work from server-confirmed work.

Start a shift

Step 1 — Wake and inspect the scanner

Confirm the facility, scanner identity, battery, storage, supported software version, and connectivity status.

Step 2 — Authenticate

Use your assigned staff badge or facility-approved method. Never use another person's badge.

Step 3 — Confirm assignment

Review the unit, shift, due work, last synchronization time, and any visible offline indicator. Contact a supervisor if the assignment is wrong.

Complete a routine room check

Step 1 — Open due work

Choose the due round or next-due view.

Step 2 — Approach the checkpoint

Confirm the physical room or location before tapping the NFC tag.

Step 3 — Tap the tag

Hold the scanner near the tag until the device confirms a read. Verify the resolved room and due context on screen.

Step 4 — Record the outcome

Select the facility-approved routine result or Issue/Exception. Enter only the minimum necessary observation; do not diagnose.

Step 5 — Wait for Saved

Do not leave the workflow until the scanner confirms that the event is saved locally. Synchronized is a separate state.

Step 6 — Continue safely

If online, the scanner synchronizes automatically. If offline, keep it secure and follow approved downtime policy. Care Scan does not contact emergency services or a nurse unless a verified integration confirms delivery; always follow facility emergency procedures.

CARE SCAN WORKFLOW

Issue, offline, and shift-end workflows

Exceptions are preserved and routed explicitly. Network failure must never force a duplicate care entry or imply that an alert was delivered.

Report an issue or exception

Step 1 — Select Issue/Exception

Choose the facility-approved category and urgency from the resolved checkpoint or round.

Step 2 — Follow urgent instructions

For urgent categories, follow the displayed facility procedure and verbal escalation path immediately.

Step 3 — Record minimum necessary information

Describe the observation, not a diagnosis. Avoid unrelated resident or personal information.

Step 4 — Confirm save and delivery state

Saved locally means the device retained the report. Queued does not mean a supervisor received or acknowledged it.

When the scanner is offline

- Confirm the visible Offline indicator and the age of cached authorization and assignments.
- Continue only when the device allows an approved offline session; otherwise follow facility downtime procedures.
- Do not repeat a saved entry solely because it has not synchronized.
- Keep the scanner powered, secure, and within the facility. Reconnect it as soon as practical.
- Escalate urgent observations verbally; never assume a queued report is an alert.

End a shift

Step 1 — Review the reconciliation summary

Check incomplete, overdue, exception, reassigned, cancelled, and pending items.

Step 2 — Complete handoff

Follow the facility's handoff policy for unresolved work and identify any pending synchronization.

Step 3 — Synchronize, sign out, and dock

Keep the device connected for an immediate sync attempt. Record any pending count and oldest age, then sign out, secure or dock the scanner, and report persistent problems.

CARE SCAN WORKFLOW

Troubleshooting and support

Use the least disruptive remedy first. Preserve original records, screen messages, device identity, and timestamps when escalating.

What you see	What to do	Escalate when
Portal will not open	Confirm facility network and use the approved Care Scan address. Do not bypass certificate or browser safety warnings.	Other local systems work but Care Scan remains unreachable.
Cannot sign in	Check email spelling and keyboard state; then contact an administrator instead of repeated guessing.	Account may be suspended, locked, or compromised.
Local server not online	Stop administrative changes and record the time and displayed status.	Status does not recover promptly or scanners cannot sync.
Unknown or wrong room tag	Do not record completion. Confirm the physical room and use a known active tag.	Tag is damaged, duplicated, retired, or resolves to another facility/location.
Saved but not synchronized	Keep the scanner powered and connected; do not repeat the entry.	Pending count grows, oldest item exceeds facility threshold, or shift handoff begins.
Scanner missing or stolen	Notify the supervisor and administrator immediately; revoke the device.	Always—also follow privacy/security incident procedures.
Update failed	Record the exact status and keep the approved package available.	Do not retry repeatedly; contact authorized support.

What to include in a support request

- Facility name and your role—never your password.
- Appliance or scanner label, displayed version, and assignment.
- Exact local date and time, page or workflow, and the message shown.
- Whether the issue is repeatable and whether work is saved, pending, or synchronized.
- No resident-identifying information unless the approved secure support process requires it.

SAFETY REFERENCE

Language, privacy, and operational guardrails

- Say checkpoint recorded—not care proven.
- When a checkpoint requires more than one observation, describe progress as observation 1 of 3—not three visits or three completed rooms.
- Say saved locally when the scanner has committed the event; say synchronized only after server acceptance.
- Acknowledged does not mean resolved, and queued does not mean delivered.
- NFC tags identify locations or assets using opaque identifiers; never store resident information on tags.
- Use the minimum necessary information in observations and exports.
- Never delete or overwrite original facts to make a report appear complete. Use an explicit review or follow-up record.
- Care Scan does not replace facility clinical judgment, emergency procedures, downtime procedures, or required documentation systems.

Prototype status: This repository describes an implementation starter and prototype. Confirm pilot approval, current release notes, facility policy, and training before clinical or production use.

End-of-guide check

- I can sign in and verify my role and server status.
- I understand the difference between saved and synchronized.
- I know how to review missed rooms without inferring care quality.
- I know how to escalate urgent observations outside the app.
- I know which administrative actions are destructive or security-sensitive.
- I know how to sign out and where to obtain facility-approved support.