Care Cloud Software

Administrator Guide

Managing your practice on Care Cloud Software

User Guide · v2.5.1

Contents

1. Getting Started

Accessing your portal

Care Cloud Software runs in your web browser — no installation required. Open your practice's portal at:

https://yourclinic.carecloudsoftware.com

> **Note:** Replace "yourclinic" with your practice's subdomain. Each practice has its own private, isolated portal and database.

Signing in for the first time

When your account is created you receive a welcome email containing your email address and a temporary password.

1. Open the portal link in the welcome email (or type your portal address into the browser).
2. Enter your email address and the temporary password from the email.
3. You will be prompted to choose a new password. Set a strong password and confirm it.
4. You are now signed in to your Administrator dashboard.

> **Note:** Passwords must be at least 8 characters and include an uppercase letter, a lowercase letter, and a number.

If you forget your password

1. On the sign-in page, click "Forgot password?"
2. Enter the email address on your account and submit.
3. Check your inbox (and spam folder) for a reset link. The link expires in one hour.
4. Open the link and set a new password.

Signing out

Use the "Sign out" option in the navigation menu whenever you step away, especially on shared computers. Your session protects patient health information (PHI).

Keeping data secure

- Never share your password. Care Cloud staff will never ask for it.
- Sign out on shared or public devices.
- Report anything unexpected to your practice administrator.

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2. Your Role as Administrator

As an administrator you manage your practice inside Care Cloud: staff and patient accounts, scheduling oversight, billing and pricing, patient communications, and payment configuration. This guide walks through each area in the left-hand navigation menu.

Area	What you do there
Dashboard	At-a-glance overview of your practice activity.
Users	Add and manage patients, doctors, and administrators.
Appointments	View and manage the full appointment calendar.
Billing	Review invoices and payment status.
CPT Pricing	Maintain the procedure price list used on invoices.
Communications	Email patients, edit templates, configure reminders and SMTP.
Payment Configuration	Connect card payments (Stripe).
Reports	Practice activity and revenue reporting.

3. Managing Users

The Users area is where you create and maintain every account in your practice.

Adding a new patient, doctor, or administrator

1. Go to Users and click “Add User.”
2. Choose the role: Patient, Doctor, or Admin.
3. Fill in the required details. Email is required for every account.
4. Click Create. The account is created and a welcome email with a temporary first-time password is sent automatically.

> **Note:** For patients, you do not set a password — the system generates a secure temporary password, emails it in the welcome package, and shows it to you on screen (with a Copy button) in case you need to relay it. The patient must change it on first login.

Resetting a user’s password

1. Open the user from the Users list.
2. Choose “Reset password.”
3. A new temporary password is generated and emailed to the user; it is also shown on screen.

Editing or removing a user

- **Edit details** Open a user to update their profile information or email address.
- **Deactivate/Delete** Remove access for staff who leave the practice. Patient records are retained per your retention policy.

4. Appointments

The Appointments area shows the practice-wide calendar. From here you can review upcoming and past visits across all providers, and confirm scheduling coverage.

- Filter by provider or date to find specific visits.
- Appointment statuses include Scheduled, Completed, and Cancelled.

- Automated email reminders (configured under Communications) help reduce no-shows.

5. Billing & Invoices

The Billing area lists invoices with their line items and payment status.

- **Line items** Each invoice itemizes services using CPT codes and the prices from your CPT Pricing list.
- **Status** Track Pending, Paid, and Overdue invoices.
- **Online payment** When card payments are configured, patients can pay invoices directly in their portal.

6. CPT Pricing

CPT Pricing is your practice's master list of billable procedures and their prices. New practices are seeded with a standard set, which you can customize.

Add, edit, or remove a price

1. Go to CPT Pricing.
2. To add: click "+ New Code," then enter the code, description, category, price, and unit.
3. To edit: change the price or details inline and save.
4. To remove: use the delete action on the row.

> **Note:** Editing a price affects future invoices only — invoices already issued keep the price they were created with.

7. Communications

Communications is your hub for patient email. It has four tabs.

Compose

1. Choose a template (or start from a custom message).
2. Select recipients — specific patients or all patients.
3. Preview the message with merge fields filled in, then send.

Merge fields such as {{firstName}}, {{appointmentDate}}, and {{doctorName}} are automatically replaced with each patient's details.

Templates

Create, edit, and delete email templates. The built-in templates — Welcome Package, Prescription Notification, Appointment Reminder, and Custom Message — can all be customized to your practice's voice.

- Click a template to edit its name, subject, and body, then Save.
- Use "+ New" to create a custom template.

- Edits apply everywhere the template is used, including automated welcome and reminder emails.

Sent Log

A record of every email sent from your practice, with delivery status (Sent, Captured, or Failed). Open any entry to view the exact message.

Settings (SMTP & Reminders)

- **SMTP settings** Enter your outbound email provider so real emails are delivered. Use “Send Test” to confirm delivery.
- **Appointment reminders** Turn on automatic reminders and choose how many hours before each appointment they are sent.

> **Note:** If SMTP is not configured, the system runs in “capture” mode — messages are recorded in the Sent Log but not delivered. Configure SMTP to email patients for real.

8. Payment Configuration

Connect a payment processor (Stripe) so patients can pay invoices online by card. Enter your keys in Payment Configuration; once connected, a Pay button appears on patient invoices.

> **Note:** For your security, enter payment provider keys yourself. Never share secret keys by email or chat.

9. Reports

Reports summarize practice activity — appointments, billing, and revenue — and can be exported for your records.

10. Security & Compliance Responsibilities

- Grant the minimum role each person needs; reserve Admin for trusted staff.
- Remove access promptly when staff leave.
- Encourage strong, unique passwords and prompt sign-out.
- Your practice’s data is isolated in its own database and backed up with encryption automatically.

Need help? Contact your Care Cloud representative or email support@carecloudsoftware.com.