

Introducing CaRa

AI-powered help + Training Assistant in your Careficient EMR, as natural as a conversation.

Finally, an EMR that talks back when you need help the most.



CaRa, How do I search for a topic in the Help Center?



CaRa, Help me reset my password asap.



I'm a new employee and need training



Can you link me to the ticket dashboard with one click?



Careficient



CaRa

Hi! What Careficient questions can I help you w



Hi there, I'm your Careficient training assistant.

Ask me anything...



Tell Me The Basics

I'm New To Using Careficient

System Questions

I'm NOT a BOT

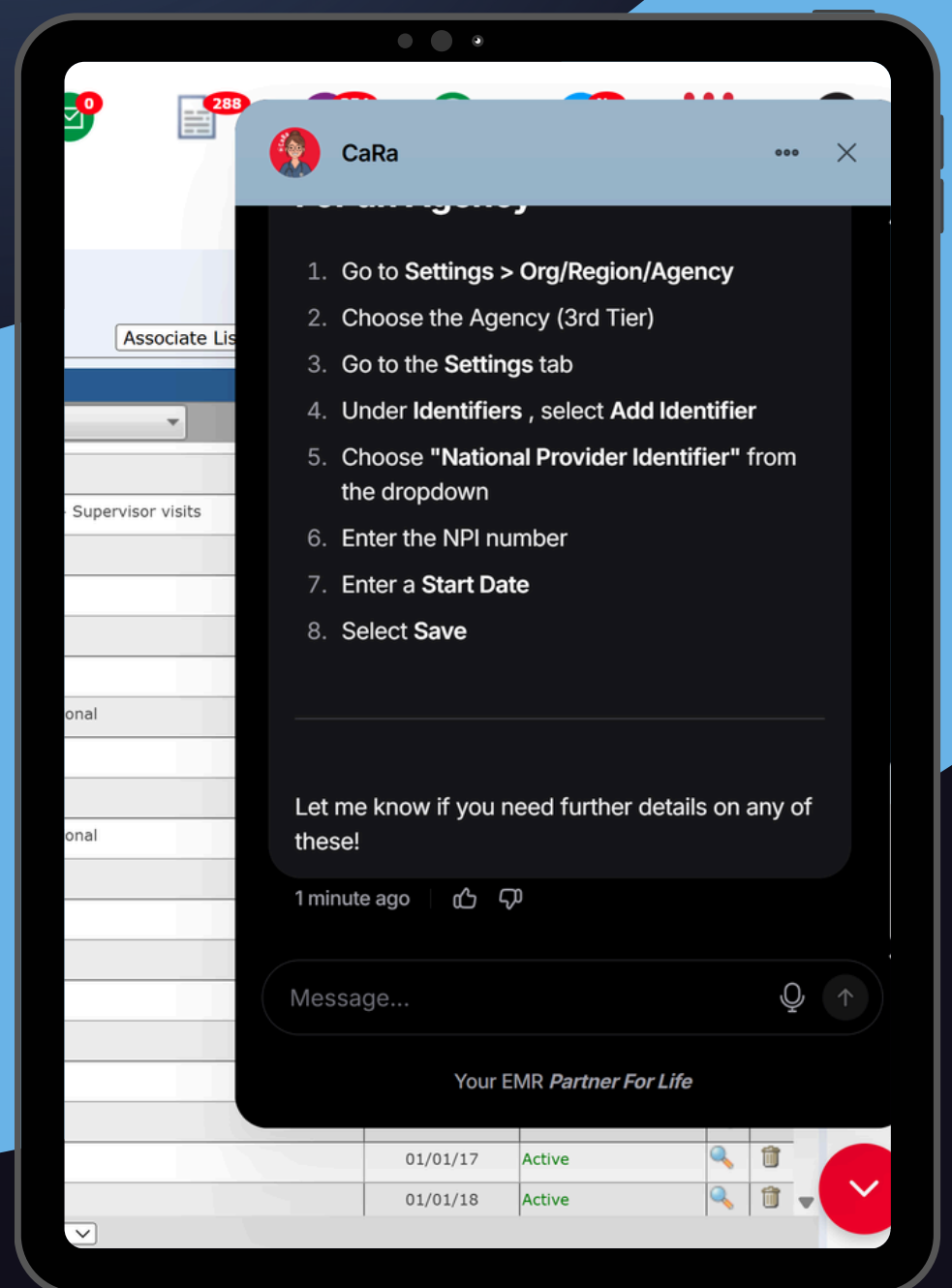
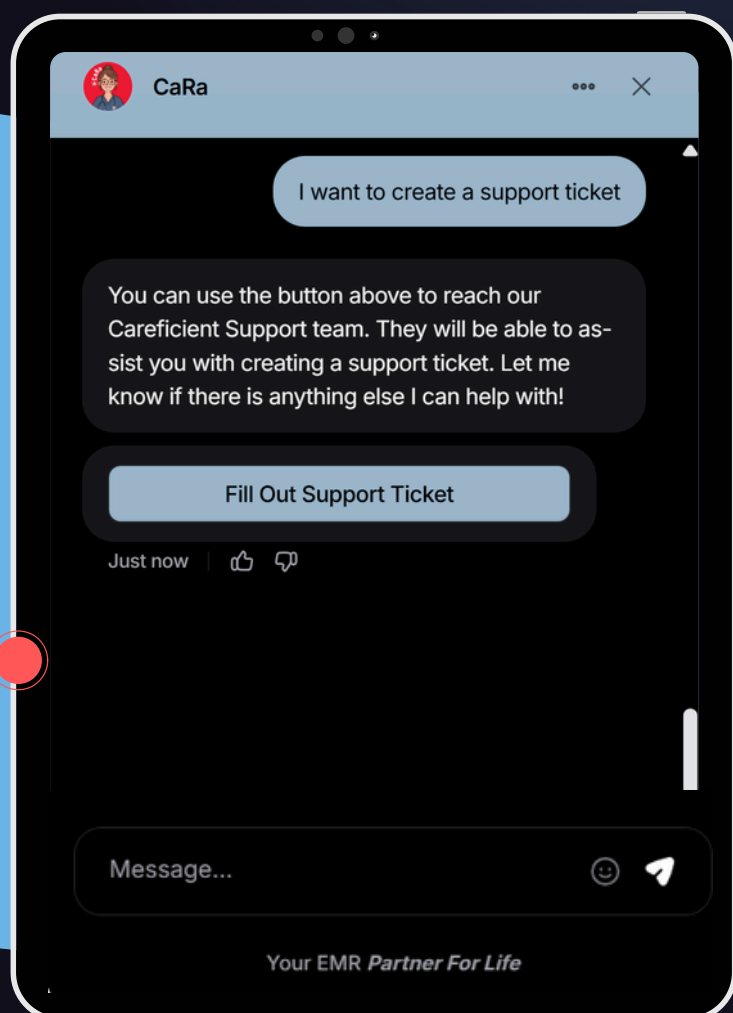
Why Bots Leave You Frustrated Instead Of Helping

Most “support bots” are built on decision-tree logic: they guide you down a series of pre-scripted menus and canned responses. If your question falls outside those scripts, you end up with generic help-center links or a support ticket. That’s slow, rigid, and leaves you doing the hard work of figuring out the next step.

CaRa Is An AI Language Model Not A Bot

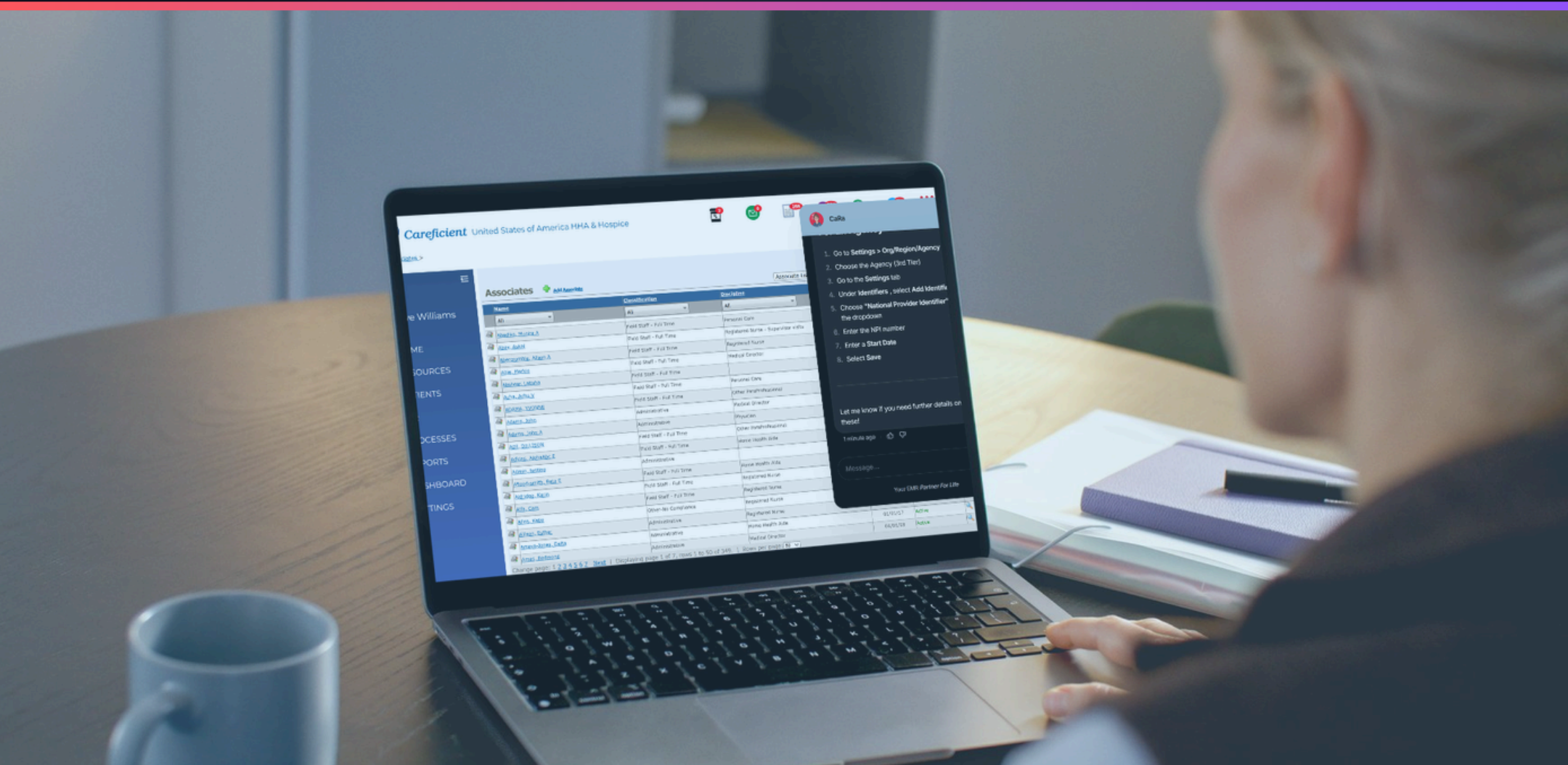
CaRa is built completely differently, she uses a domain-trained AI language model connected only to Careficient’s verified system knowledge. Instead of matching keywords to canned responses, CaRa understands full natural-language questions, interprets their meaning in context, and produces direct, step-by-step instructions tailored to Careficient workflows.

For those rare moments when you need a custom request, **CaRa** puts the support ticket dashboard one click away, no hunting, no hassle.



How CaRa Is Built *Without* Getting In The Way

- ✓ **Native, on-screen access:** Lives on the Careficient UI for instant help where you work: no tab-hopping.
- ✓ **Continuous Chat:** Unlike most support tools that reset when you change screens, CaRa keeps your thread active so you can reference answers without losing progress.
- ✓ **Instruction-level answers:** Returns clear, step-by-step guidance (not just links) sourced from verified Careficient system knowledge.
- ✓ **Real-time speed:** Typical responses in ~2–3 seconds so workflows aren't interrupted.
- ✓ **Home health & hospice-tuned:** Answers align to Careficient processes, policies, and terminology.
- ✓ **Ticket reduction:** Direct, accurate answers first, escalate only when truly necessary via the “Fill Out Support Ticket” button.



How Teams Use CaRa:

A Real Life Scenario Story

It's 4:48 p.m. On A Tuesday.....

Maria, a home health RN, has just wrapped a patient visit and is back at her laptop to finalize documentation before the end of the day. She's tired, has two more chart notes to finish, and realizes she can't remember exactly where in Careficient to upload a physician order for hospice certification.

Normally, she'd:

- Search the help center, taking more time than she has to find the answer.
- Call support and wait for a response.
- Or submit a ticket and wait for a live person to respond.

But today, she clicks CaRa.

Without leaving the EMR screen, Maria types:

"Where do I upload a physician order for hospice certification?"

In 2.5 seconds, **CaRa** responds with:

1. The exact menu path in Careficient.
2. Step-by-step upload instructions.
3. Tips from internal policy so it's done right the first time.

Maria follows the steps, finishes her documentation, and clocks out on time. No delays. No ticket numbers. Just instant, accurate answers, every time.



More Than Support. *CaRa Teaches.*

Built For Learning, Not Just Lookups

The same AI that answers in-EMR questions on the support side also lives in a dedicated training space under the help icon, designed for one job: helping your team master Careficient, whether that's day-one onboarding or a quick refresher on a workflow they only run once a quarter.

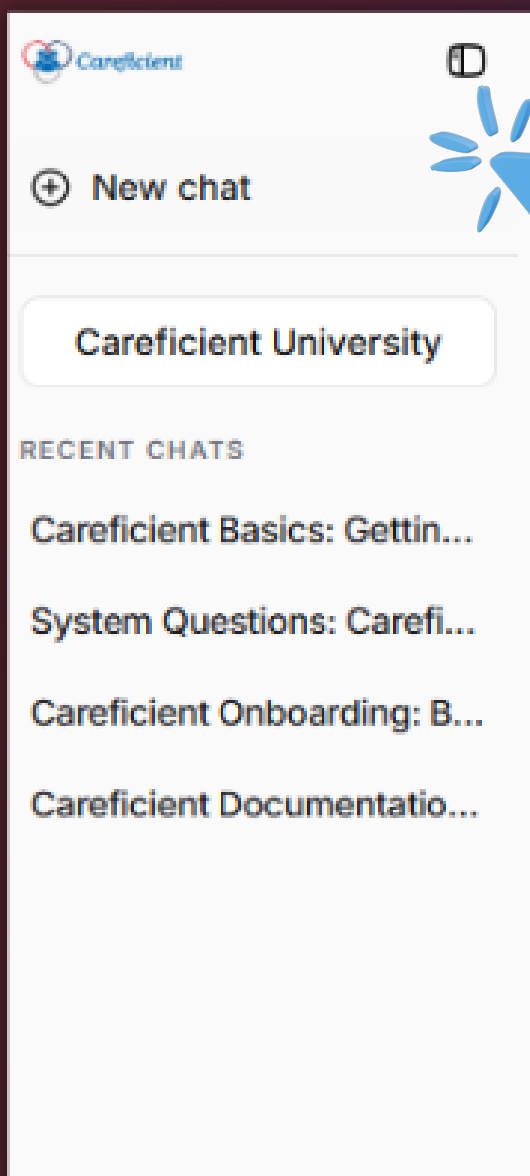
Save Chats. Build Your Personal Playbook.

Most help sessions vanish the moment you close the tab. CaRa Training Assistant saves them like a library. Save any chat to your sidebar, organized by topic, and pick up exactly where you left off.

Working through intake? Save it. Learning OASIS for the first time? Save it. Each saved thread becomes one-click reference material the next time the topic comes up, so step-by-step training turns into a personal library that grows with every question.

Who It's For:

- **New employees** — a low-pressure space to ask anything and build confidence before going live in the EMR.
- **Existing staff** — fast refreshers on workflows they don't use daily (billing edge cases, eligibility checks, infrequent reports).
- **Trainers & managers** — reduce hands-on training hours without sacrificing depth. New hires self-pace through topics with CaRa as their always-available coach.



Save your learning topics in
a *personal library*.

