

UNIVERSITY

**Getting Started:**  
**Focus Group**





## STEP 1: JOIN THE FOCUS GROUP

1. Sign up for your account here: <https://bit.ly/myhana-focusgroup>



Order Summary		
Item	Quantity	Price
Focus Group	1	\$1.00
<input type="text" value="Coupon Code"/> <a href="#">Apply</a>		
<b>TOTAL</b>		<b>\$1.00</b>

2. **Enter coupon code.** Your coupon code will be provided by your organizational partner or myHana™ faculty member who has invited you to participate.

Account Information	
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>
<input type="text" value="Email*"/>	<input type="text" value="Company"/>
Billing Address	
<input type="text" value="United States"/>	
<input type="text" value="State*"/>	<input type="text" value="City*"/>
<input type="text" value="Street*"/>	<input type="text" value="ZIP*"/>
Shipping Address <a href="#">Copy Billing Address</a>	
<input type="text" value="United States"/>	
<input type="text" value="State"/>	<input type="text" value="City"/>
<input type="text" value="Street"/>	<input type="text" value="ZIP"/>
Payment Information	
<input type="text" value="Card Number"/>	
<input type="text" value="MM / YY"/>	<input type="text" value="CVV"/>
Card Address	
<input checked="" type="checkbox"/> Same As Billing Address	

3. **Complete the form.** Please note that payment information is required, but no charge will occur to your choice of payment method.

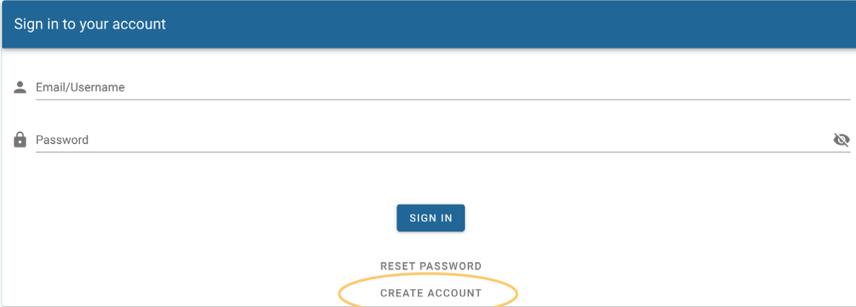
4. **Choose subscribe .**



## STEP 2: CREATE YOUR ACCOUNT

1. Visit: <https://www.caregivingdrive.com/Login>

2. Choose Create Account



Sign in to your account

Email/Username

Password

SIGN IN

RESET PASSWORD

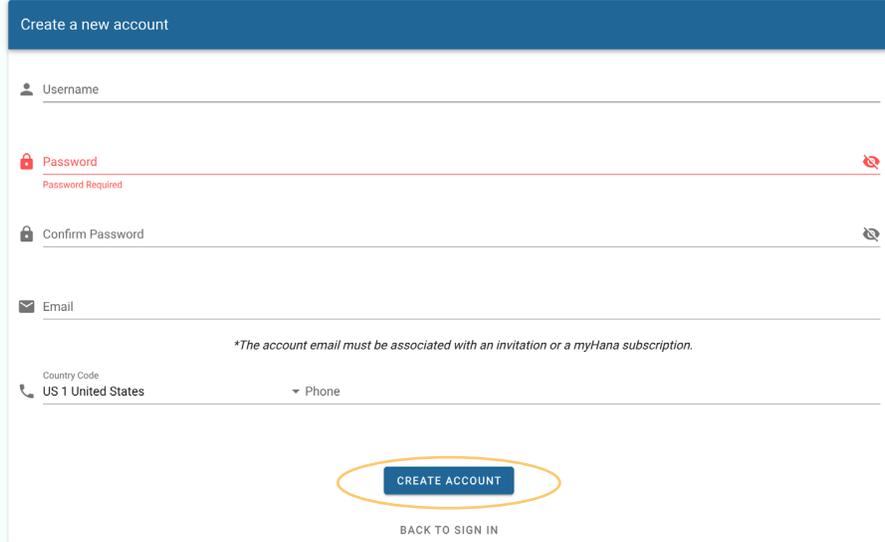
CREATE ACCOUNT

3. Choose your username and password.

**Username:** \_\_\_\_\_

**Password:** \_\_\_\_\_

Please note: your email must match the email you used to set-up your subscription.



Create a new account

Username

Password  
Password Required

Confirm Password

Email  
*\*The account email must be associated with an invitation or a myHana subscription.*

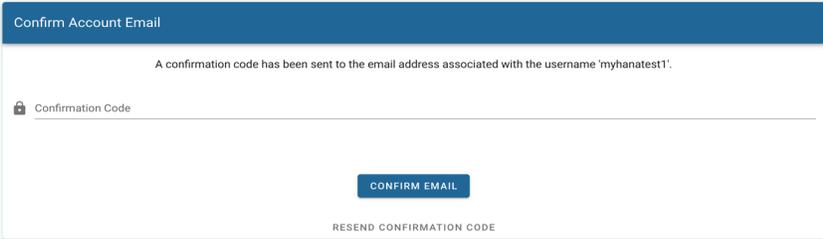
Country Code  
US 1 United States

Phone

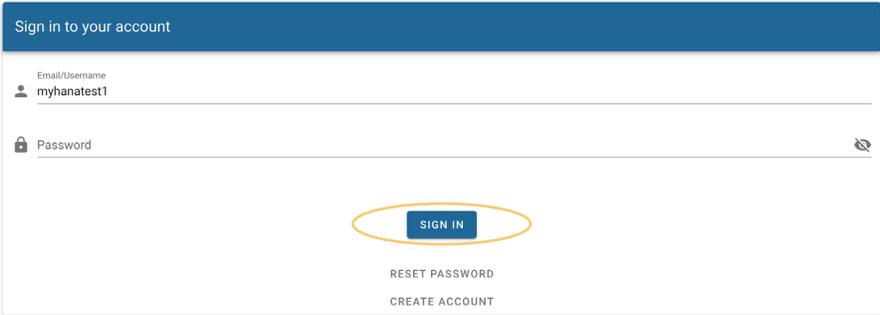
CREATE ACCOUNT

BACK TO SIGN IN

#### 4. Enter confirmation code that is sent to your email.

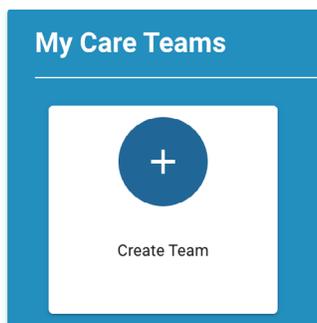


#### 5. Log into the myHana™ Caregiving Drive.



### STEP 3: CREATE YOUR TEAM

#### 1. Choose “Create Team”



## 2. Complete the profile and choose Create Team

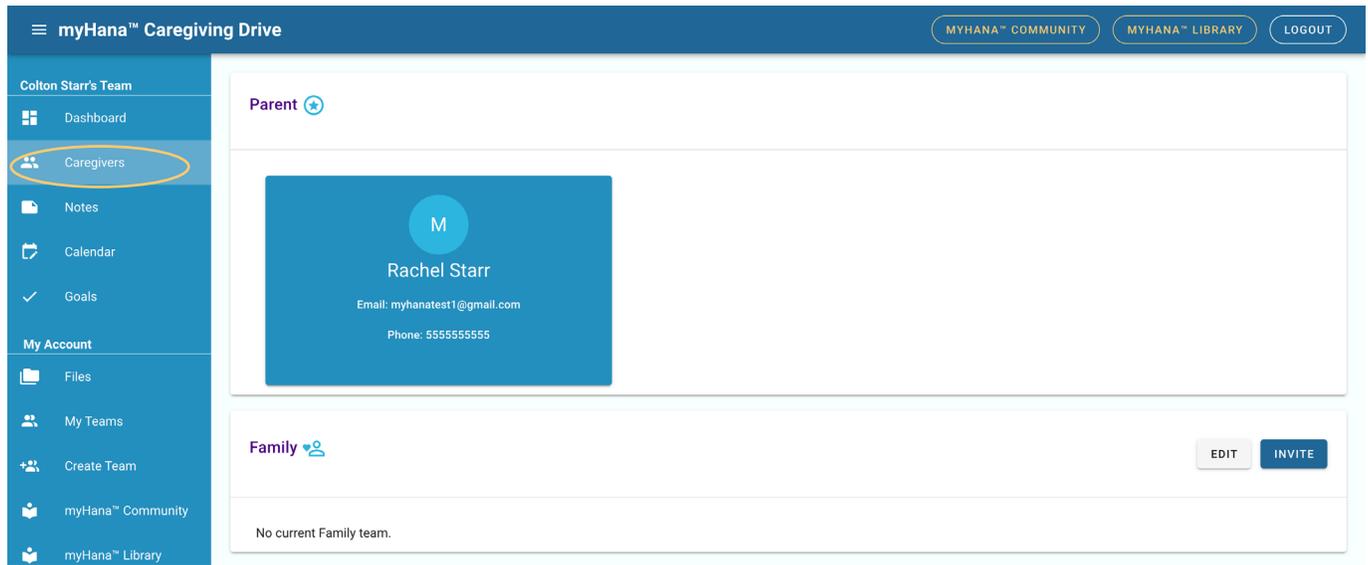
The screenshot shows the 'Create Your Loved One's Team' form. The form includes the following fields: 'First Name', 'Last Name', 'Zipcode', 'Year of birth', and 'Primary condition or diagnosis'. A 'CANCEL' button is located at the bottom left, and a 'CREATE TEAM' button is at the bottom right, circled in yellow. The left sidebar menu is visible, showing options like 'Dashboard', 'Caregivers', 'Notes', 'Calendar', 'Goals', 'My Account', 'Files', 'My Teams', and 'Create Team'.

## 3. Choose “Profile” from the left menu and update your personal information by choosing “Edit”.

The screenshot shows the 'My Profile' page. The form includes the following fields: 'Title', 'First Name' (myhanatest1), 'Last Name', 'Phone', 'Username' (myhanatest1), 'Email' (myhanatest1@gmail.com), and 'Account Type' (myHana Subscription). An 'EDIT' button is located at the bottom right of the form, with a hand-drawn arrow pointing to it. The left sidebar menu is visible, with the 'Profile' option circled in yellow.

# STEP 4: BUILD YOUR TEAM

## 1. Choose the “Caregivers” tab on the left side menu



## 2. Add Team Members

### Team Member Types:

- **Family:** parent, step-parent, grandparents, siblings
- **Medical:** pediatrician, dentist, specialists (cardiologist, geneticist, neurologist, endocrinologist, gastroenterologist, etc), psychiatrist
- **Education:** teachers, case manager, paraeducator, guidance counselor, principal
- **Behavior:** therapist, social worker, psychologist, psychiatrist
- **Financial:** accountant, estate attorney, wealth manager

## 3. Choose Invite

## 4. Enter Information and Choose “Send”

An invite will be sent to your Care Team Member and they will be able to create a free account to access information.

Send an Invite to the Family Team:

Title \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Email\* \_\_\_\_\_

Message

Hello,

User myhanatest1 has invited you to join their myHana™ Caregiving Team. Please click the link below to create your free Caregiving Team account and begin collaboration with Colton Starr's Team. <https://www.caregivingdrive.com>

Kind Regards,  
myHana™ Support

\*required field

CANCEL SEND

## STEP 5: CREATE YOUR FIRST NOTE

1. Choose “Notes” from the left side menu
2. Enter a title and description for your note.

The screenshot shows the 'Add New Note' form in the myHana™ Caregiving Drive interface. The form is titled 'Add New Note' and contains two main input fields: 'Note Title' and 'Note Details'. Below these fields is a section for sharing the note with team members, labeled 'Share Note With Team's Caregivers:'. This section includes icons for adding, removing, favoriting, and sharing, along with a dropdown menu showing 'Rachel Starr (Account Owner)'. At the bottom of the form are 'CANCEL' and 'POST' buttons.

3. Choose the team members that will have access to the note.

Share Note With Team's Caregivers:



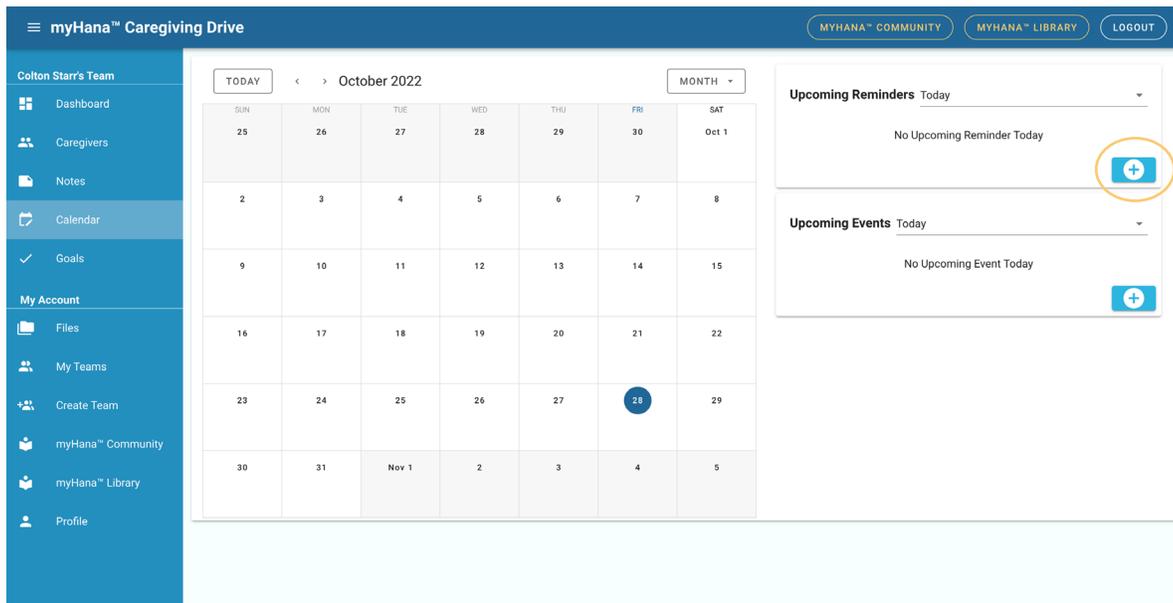
4. Choose “Post”

The screenshot shows the 'Review Notes' table in the myHana™ Caregiving Drive interface. The table has a search bar at the top right and a 'CANCEL' button on the left. The table columns are 'Title', 'Note', 'Author', 'Posted', and 'Shares'. The table is currently empty, displaying 'No data available'. At the bottom right, there is a 'Rows per page' dropdown menu set to '10' and navigation arrows.

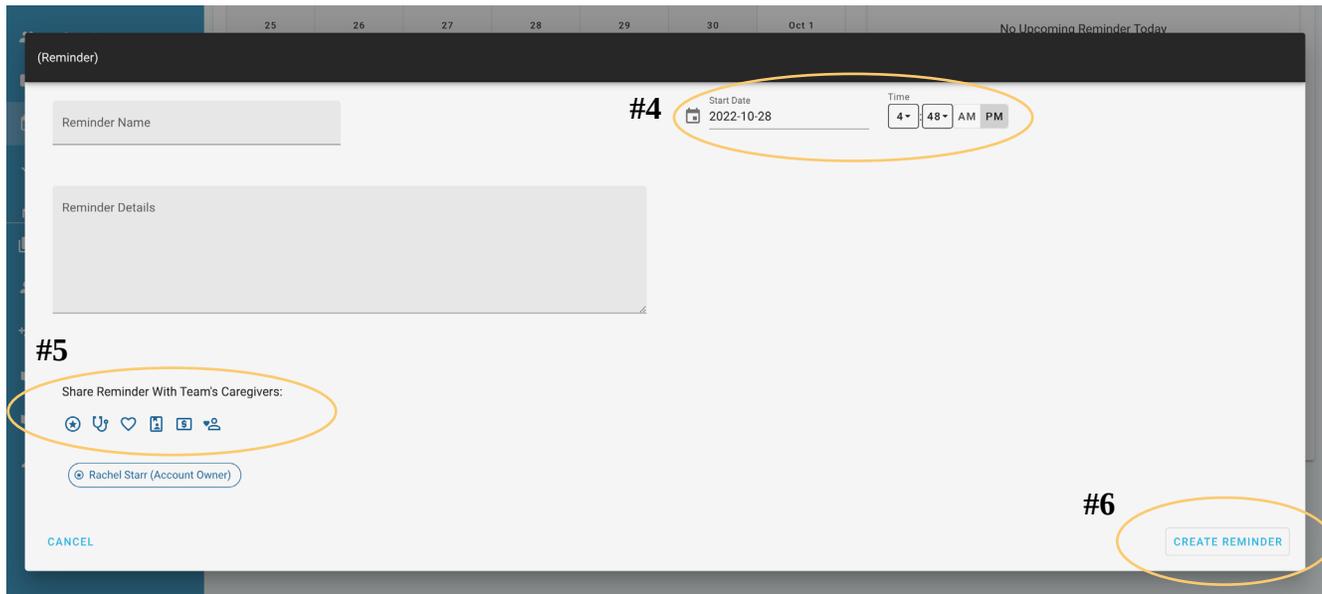
Title	Note	Author	Posted	Shares
No data available				

## STEP 6: CALENDAR

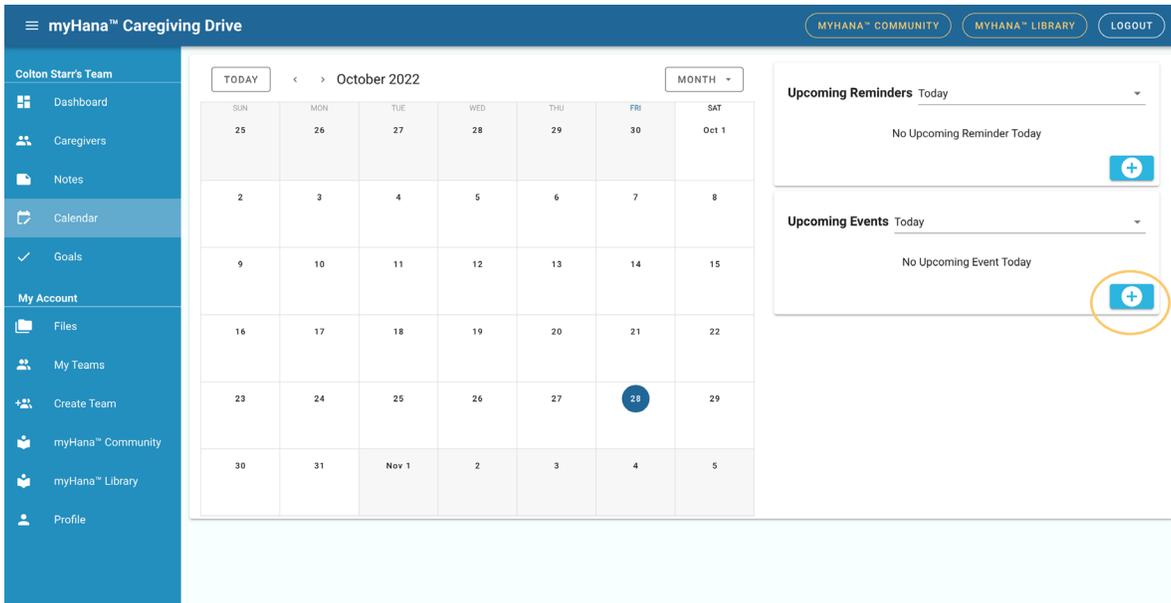
1. Choose “Calendar” from the left side menu
2. Choose “+” to add a new reminder



3. Enter name and details of reminder
4. Choose date
5. Choose the members of your Caregiving team to share this reminder with
6. Choose Create Reminder



## 7. Choose “+” to add a new event



## 8. Enter name and details of event

## 9. Choose dates and time

## 10. Choose the members of your Caregiving Team to share this event with

## 11. Choose Create Event



## STEP 7: GOALS

1. Choose “Goals” from the left side menu
2. Choose “Create New Goal” to add a new goal
3. Enter Title and Description of Goal
4. Enter Action Steps and Description for each step
5. Click “Save Step”
6. Choose your team members that will have access to the goals
7. Choose “Save Goal”

myHana™ Caregiving Drive

MYHANA™ COMMUNITY MYHANA™ LIBRARY LOGOUT

Colton Starr's Team

Dashboard Caregivers Notes Calendar Goals

My Account Files My Teams Create Team myHana™ Community myHana™ Library Profile

Create New Goal:

Title\*

Description\*

Add action steps to take towards reaching this goal. (Minimum of 1)

Action Step Name

Action Step Description

SAVE STEP

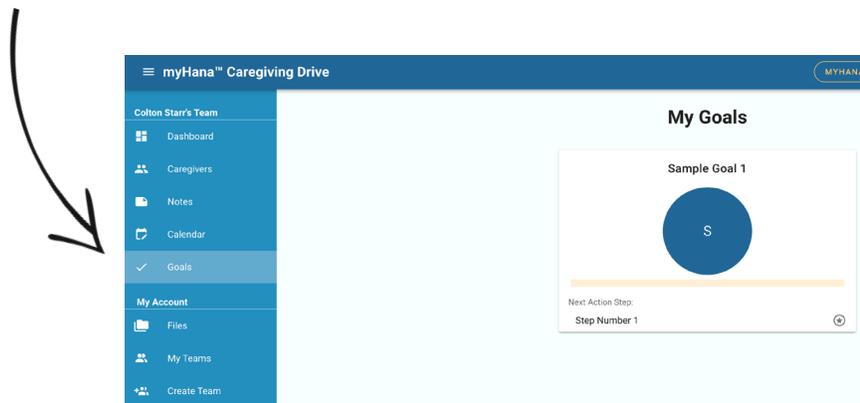
Share Goal With Team's Caregivers:

Rachel Starr (Account Owner)

CANCEL

SAVE GOAL

8. Access your goals from the goals tab



## 9. Track your progress

myHana™ Caregiving Drive

MYHANA™ COMMUNITY MYHANA™ LIBRARY LOGOUT

Colton Starr's Team

- Dashboard
- Caregivers
- Notes
- Calendar
- Goals

My Account

- Files
- My Teams
- Create Team
- myHana™ Community
- myHana™ Library
- Profile

My Goals

Sample Goal 1

S

Amazing things happening here.

Action Steps:

- Step Number 1 ✓
- Step number one,  
Mark Action Step Completed:
- Step Number 2

Share Goal With Team's Caregivers:

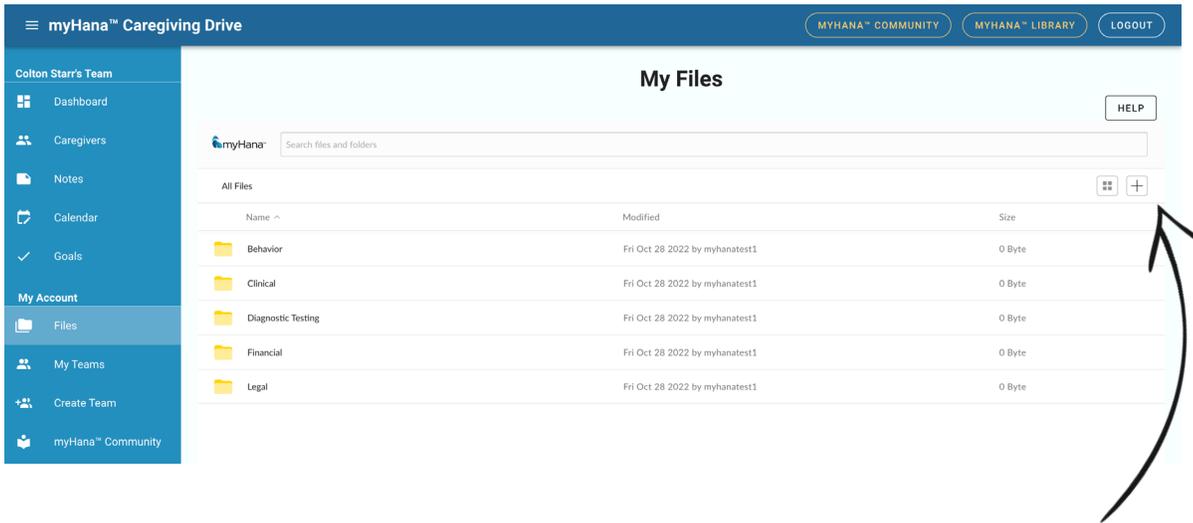
Rachel Starr (Account Owner)

EDIT MENU

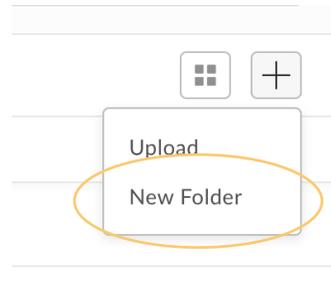
## STEP 8: FILES

### 1. Choose “Files” from the left side menu

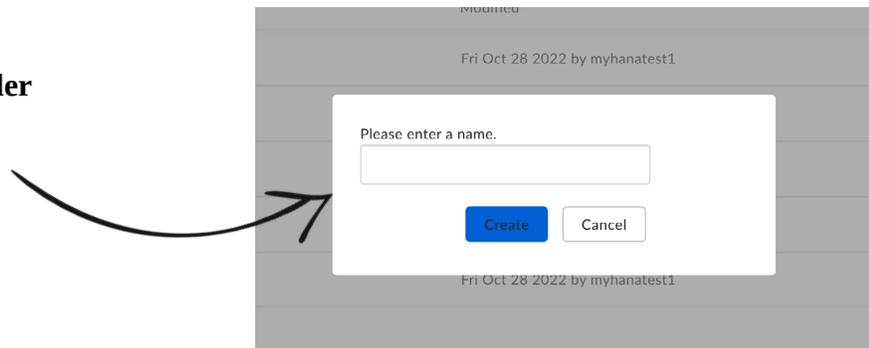
Your account will come with five pre-populated folders.



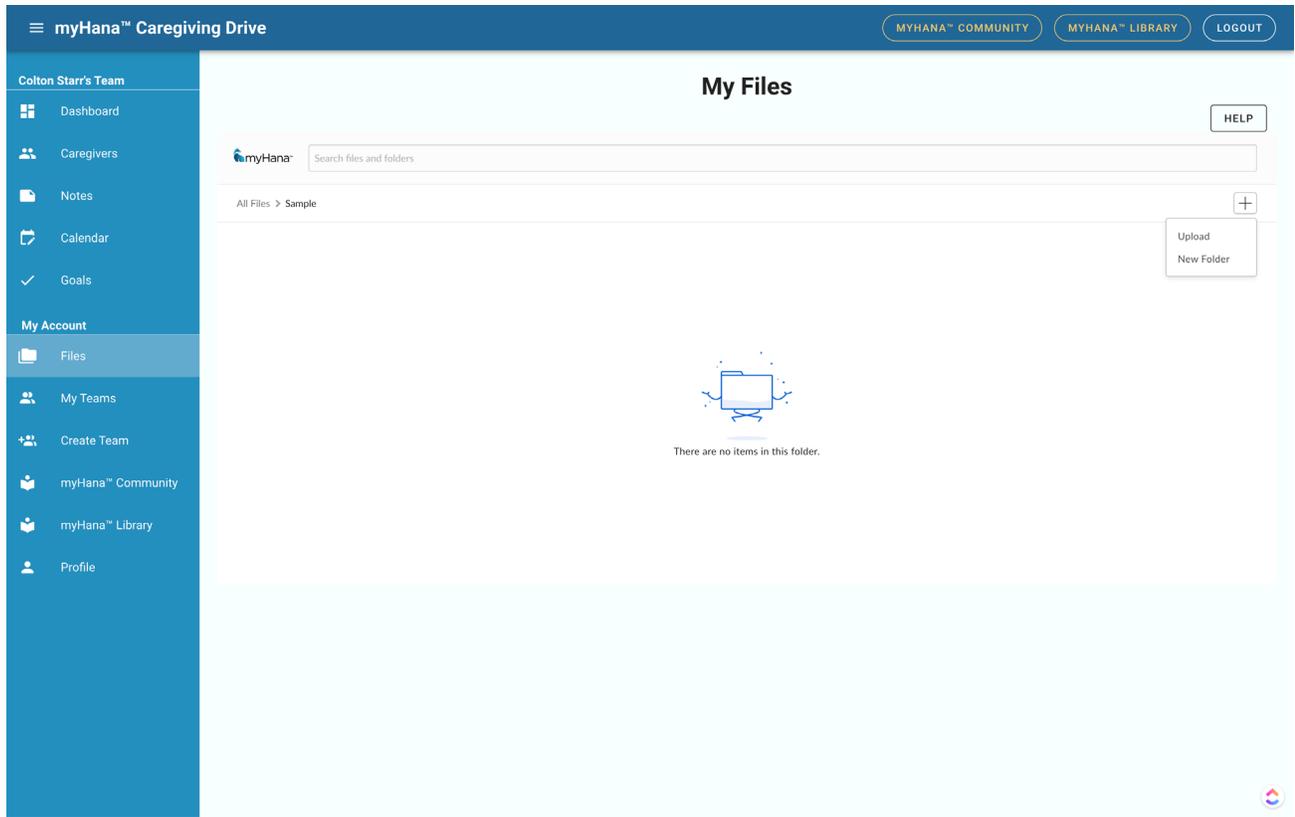
### 2. Create additional folders by choosing “+” and clicking “New Folder”



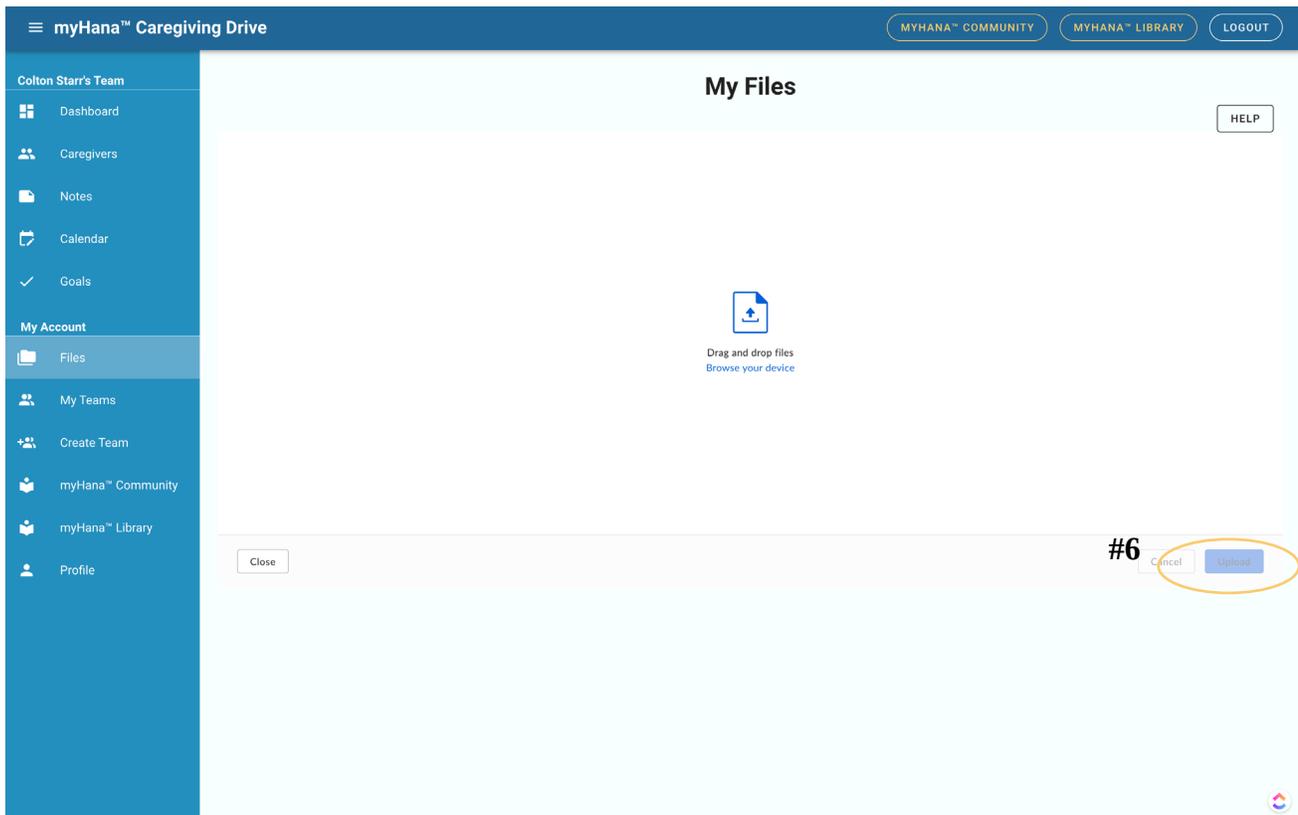
### 3. Enter a name for your folder



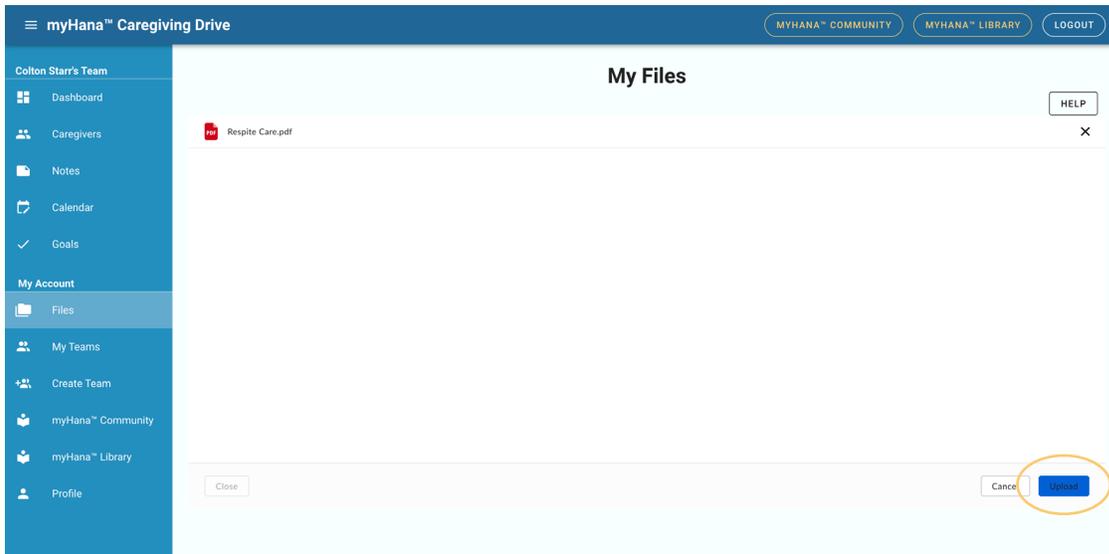
#### 4. Choose “+” and upload to add files



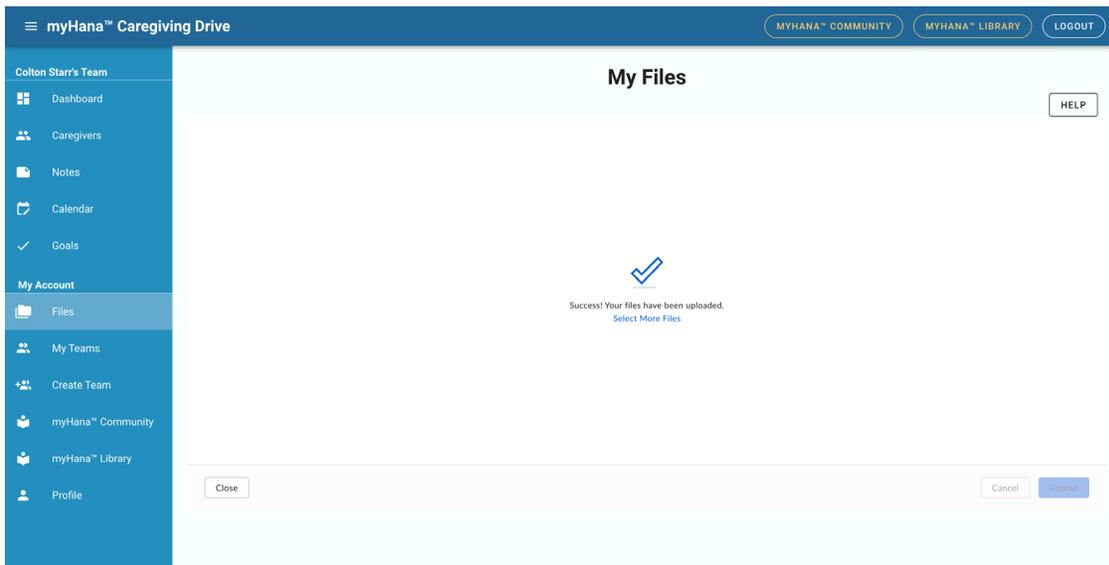
#### 5. Browse or Drag and Drop files to your drive 6. Choose upload



## 7. Choose upload

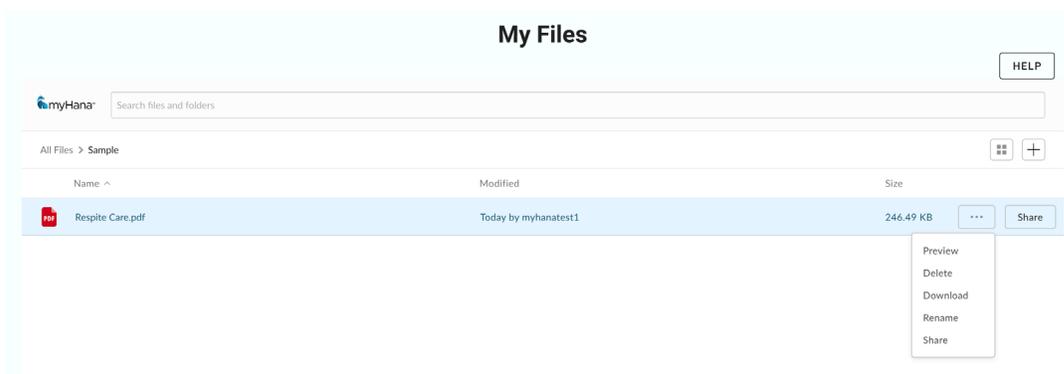


## 8. You will receive a “Success” message and can continue to upload



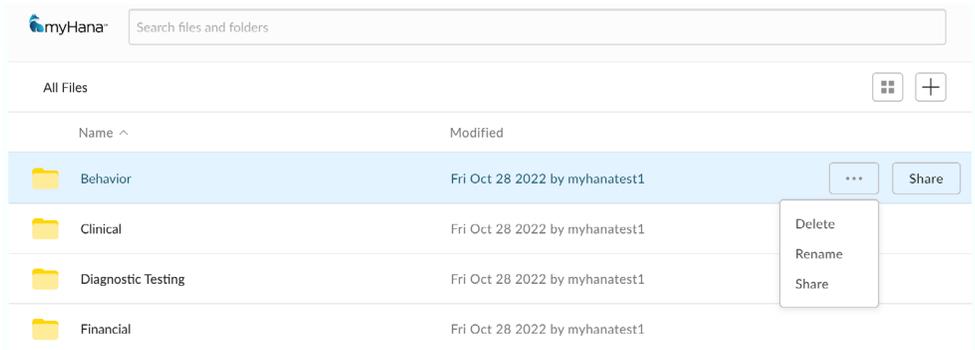
**FILE OPTIONS:** Choose “...” from the right side of your file list to view file options.

From here you have the option to preview, delete, download, rename, or share the file.



**FOLDER OPTIONS: Choose “...” from the right side of your file list to view file options.**

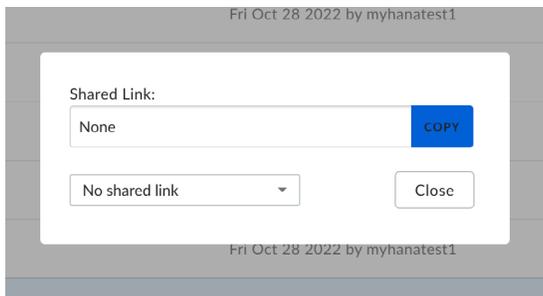
From here you have the option to delete, rename, or share the folder.



**SHARING FOLDERS AND FILES:**

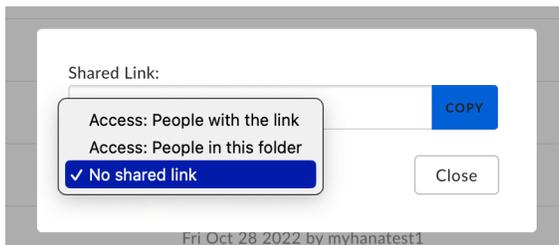
**1. Choose “...” from the right side and the “share” option from the drop down or the share button from the folder or file you would like to share.**

The popup below will appear.



**2. Choose your sharing option from the drop down arrow.**

Access: People with the link or Access: People in this folder



**3. Copy and share the link to grant access to your folder or file.**

