Protected Tomorrows®

**Creating the Future Care Plan™
for Family Members with Special Needs
Online Manual**

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Over-
view

Protected Tomorrows® will help you create a Future Care Plan™ for your family members with special needs. This manual pertains specifically to the online version of Stages 1-8 available at www.ProtectedTomorrows.com.

Stage 1 Take a Candid Look™
Look honestly and comprehensively at your loved one's future care needs, in light of your own future needs and those of other family members.

Stage 2 Create the Future Map™
Indentify the options and create a plan to protect your entire family's future in light of your family member's special needs.

Stage 3 Filter the Legal Options™
Evaluate estate solutions, focusing on the various options available through professional legal resources. Implement the steps to take advantage of your decisions.

Stage 4 Capture Potential Benefits™
Indentify and apply for supplemental programs to enhance and supplement the **Future Care Plan** you have created for your loved one.

Stage 5 Document the Wonder™
Chronicle and treasure your loved one's special story and gifts so that others can carry forward in building your family member's abilities and self-esteem.

Stage 6 Begin the Transition™
Indentify and evaluate the future residential, employment, and recreation options for your family member with special needs.

Stage 7 Fund the Future™
Utilize financial solutions to complement the **Future Care Plan** designed for your family member's future.

Stage 8 Review and Renew™
Review your **Future Care Plan** to accomodate and address life's inevitable changes.

Stage 1-4 , 6-8 is available as an online product. Stage 5, Document The Wonder - My Special Life, is a separate product. Both may be purchased on a subscription basis at the Protected Tomorrows Family Store located at www.ProtectedTomorrows.com.

Opera-tion

The Future Care Plan (online version) is available at www.ProtectedTomorrows.com. You must first purchase a subscription to the product(s) you wish to access and then login to gain access to your subscription. You may purchase your subscription online 24 hrs a day in the Family Store at www.ProtectedTomorrows.com or by calling Protected Tomorrows during regular business hours.

Once you place your subscription order, Protected Tomorrows web services will set up a private account for you to access your subscription. When the account is established, you will receive an email that provides your Username and Password. Account activation may take up to 5 business days.

Login

Now that you have purchased your Future Care Plan subscription and have received your Username and Password, browse to www.ProtectedTomorrows.com and select **Login (A)** on the top right corner of the home page.


The above login page will appear. Enter your **Username (B)** and **Password (C)** and press the **Login button (D)** just below your entries.

If you forgot your password, press the **Forgot your password (E)** link and enter your email address. Your password will be sent to you. If your family establishes multiple accounts, each account must use a different email address (multi-account access is a future feature).

As an added security precaution, if you login improperly five times in a row, your account will be suspended for 25 minutes and the following error message will display.

The account has been temporarily disabled (25 minutes) because you have reached the maximum allowed failed login attempts (5).

Welcome
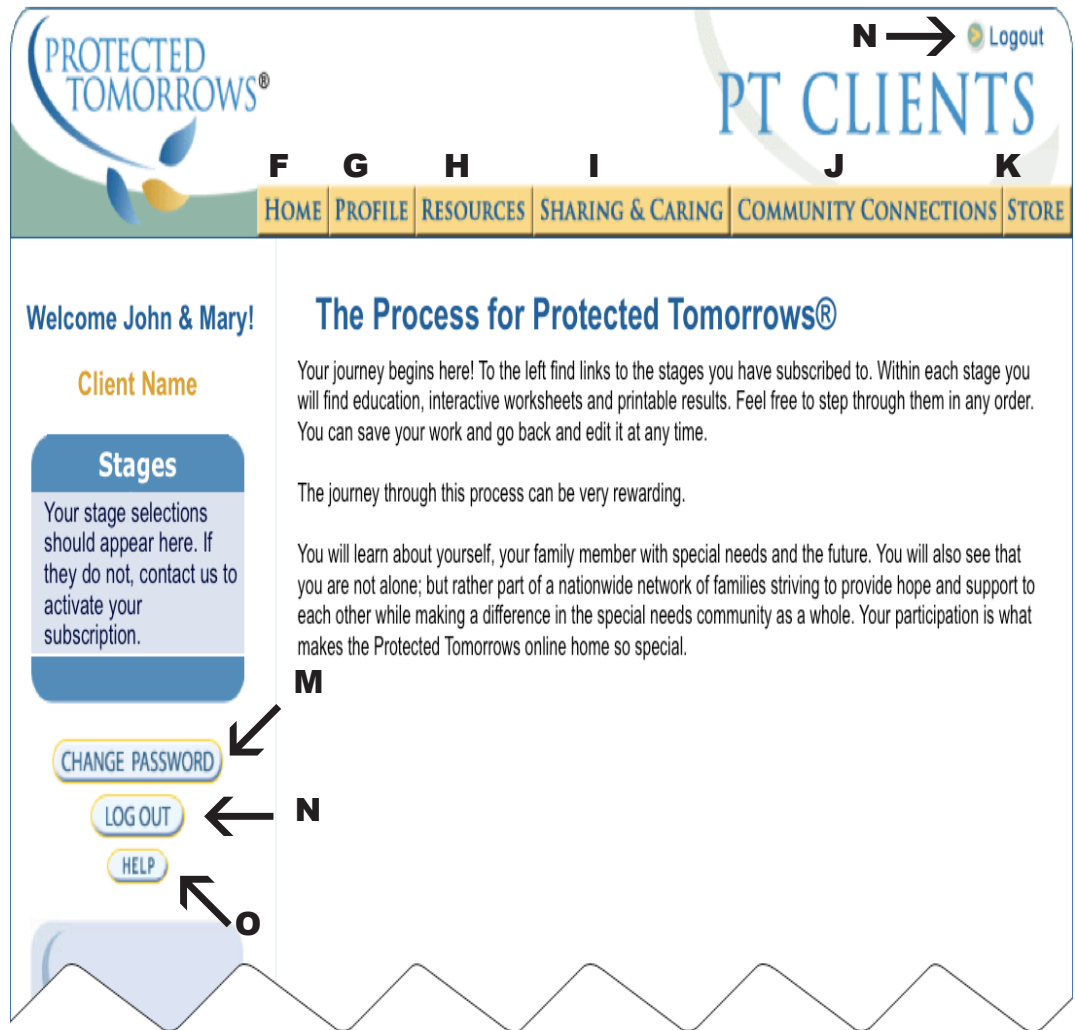
The above Welcome page will appear once you have logged in successfully. At times there may be special notes and messages to you. Review this page each time you log in.

Selecting the **Home button (F)** from any page within your private section will bring you back to this home page. The **Profile button (G)** will allow you to change your account profile. The **Resources button (H)** is presently reserved for future family resources. Selecting the **Sharing & Caring button (I)** brings you to your neighborhood connection that is under development. The **Community Connection button (J)** is presently reserved for the future home of your community social network. Pressing the **Store button (K)** takes you to our Family Store where you can purchase Stage subscriptions and other valuable services and materials. The **Change Password button (M)** allows you to change your password, and the **Log Out button (N)** will sign you out of your private area. There are two buttons to Log Out, one in the left column and one on the upper right of the page. The **Help button (O)** takes you to a help and tutorial section.

ALWAYS LOGOUT AT THE END OF EACH SESSION
You should Logout every time you finish working with your Stages. If you do not logout, the next time you use the system, you will automatically be logged back in, without having to enter your username or password. This means <u>anyone</u> that uses your computer will have access to your financial, legal and family information entered in your stages.

The left column of the welcome page will display differently, depending on the products you have subscribed to.

- **A** - Information bar, if stages have not been activated.
- **B** - Stage 5, Document the Wonder only.
- **C** - Stages 1-4, 6-8 only.
- **D** - Both Stage 5 and Stages 1-4, 6-8 subscribed to.

Profile

Press the **Profile button** and use the page below to update your account record.

Update your contact information. Fields marked with * are required. Press the **Update Profile button** (**E**) to save changes to your profile.

Change Password

It is wise to change your password on a regular basis to secure your personal data. Select **Change Password button (F)**, the following page will display.

To change your password, enter your old password, enter your new password and confirm the new password by re-typing it.

Your password should be strong.
- Do not use something that someone can easily figure out, like your last name, birthday, phone number, etc.
- Never use a password that you use anywhere else.
- Use something you can easily remember, but include both lower and upper case characters as well as at least one number.
- Never allow anyone else to know our password.

Press the **Change Password button (G)** to submit your change.

Stages 1-4, 6-8

It is beyond the scope of this manual to describe the specific details and operations for each and every stage. Here, we look at Stage 1 as an example and later Stage 5. The rest of the Stages follow suit.

Stages	
Take a Candid Look™	Stage 1
Create the Future Map™	Stage 2
Filter the Legal Options™	Stage 3
Capture Potential Benefits™	Stage 4
Document the Wonder™	Stage 5
Begin the Transition™	Stage 6
Fund the Future™	Stage 7
Review and Renew™	Stage 8

Stage 1

Select **Take a Candid Look (Stage 1)** and the following page displays.

Data Entry

The **Take a Candid Look** page offers two additional selections as we drill down toward a formal entry page. The **Left Bar Submenu (A)** and the **Main Screen Submenu (B)** are indentical. The **Left Bar Submenu** and **Main Stage Menu (D)** will remain on the pages during the Stage operations. This offers a clean and efficient way to move between menu selections.

Selecting **Initial Appraisal (C)** from one of the submenus will display the page below.

Make an entry for each question. Questions may appear as large text boxes (as above), smaller text fields, check boxes, or various other selections. Each is self-explanatory. Once you have completed the questions to your satisfaction, press the **Submit button (E)**. You may leave question(s) unanswered and return at a future time to complete them. You may change the answers to any of the questions any time you wish by returning to the entry page. Data is permanently stored when you click the **Submit button**. The **Reset button (F)** will revert data to its previously stored state.

Confirmation

When you complete the entries and press the **Submit button**, a confirmation page will display, similar to the example below.

This confirmation page duplicates your entries from the prior entry page. You may return to the entry page by pressing the submenu selection on the left bar and make changes, continue on to another submenu, or select a different Stage from the main menu. You may also select the **Printer Friendly Version (A)** link that opens a new browser window with data formatted for printing.

Printer Friendly Version

If the margin border lines do not print, turn your browser "background" printing on. Use Print Preview to evaluate the output — turn off headers and footers, and set the margins and page percent to fit your paper.

The **Printer Friendly Version** is perfect to print and post in a 3-ring binder. Use these printed pages to document your progress and to work with Your Protected Tomorrows Licensed Advocate. Below is the **Printer Friendly Version** for **Stage 1, Initial Appraisal**.

Stage 1

TAKE A CANDID LOOK™

PROTECTED TOMORROWS®

Initial Appraisal

Your Dreams:

This is a demo of Initial Appraisal for our Dreams.

Your Goals:

This is a demo of Initial Appraisal for our Goals.

Your Fears:

This is a demo of Initial Appraisal for our Fears.

Your Family:

This is a demo of Initial Appraisal of our Family.

Your Life:

This is a demo of Initial Appraisal of our Life.

B
↓

Your Protected Tomorrows® Advocate
John Jones
123-456-7890

The **Printer Friendly Version** opens in a separate browser window. After you print it, close the window to return to the application.

If your account is associated with a Protected Tomorrows Advocate, his or her name and phone number (**B**) is printed on the bottom right of the report .

Submenus Stages 1-4, 6-8

As you move from stage to stage, the following submenu for each stage displays.

Take a Candid Look™
Stage Main Page
Initial Appraisal
Life With Your Family Member
①

Create the Future Map™
Stage Main Page
Vision
Implementation
②

Filter the Legal Options™
Stage Main Page
Naming the Money People
Beneficiaries
Coming of Age
The Future Care People™
Family Plan
Estate Plan
Family Coordination
③

Capture Potential Benefits™
Stage Main Page
Entitlement
Abilities
Medical
Financial
Maintenance
More Programs
④

Begin the Transition™
Stage Main Page
Vision
Key Players
⑥

Fund the Future™
Stage Main Page
Action Plan
Action Plan for Later
⑦

Review and Renew™
Stage Main Page
Review
Renew
⑧

Submenu Stage 5

Document the Wonder™
Table of Contents
← **5A**

↙ **5B**

Document the Wonder™
Table of Contents
About Me
I Was Chosen For Adoption
My Mother
My Father
My Sisters
My Brothers
My Aunts, Uncles And Cousins
My Grandparents
Other Relatives And Friends We Trust
My Family Life At Home
My Family Life Away From Home
Our Special Family Traditions
Religious Preference
Religious Activities
My Daily Routine

Physician(s)
My Other Specialists
My Dental Information
Medical Personnel I Am Never To See
Medications
My Pharmacy And Hospital
My Emotional Well-Being
My Behavioral Information
My Personal Behaviors
My Social Behaviors
My Adult Behavior
Important Documents And Their Locations
Advisors
My Guardianship
My Government Benefits
My Insurance Information
Final Arrangements
My Residential Planning

Stage 5, Document The Wonder.

SubMenu 5A is blank, representing that there has been no Stage 5 activities completed. **SubMenu 5B** is a fully completed menu, representing that all of the activities have begun. Further details follow.

Stage 5 Document the Wonder

Select **Document the Wonder** from the Stages Main Menu.

Check one or more topics to work on and press the **Submit button (A)**. The **Reset button (B)** resets any immediate checks you have selected. Once an activity has begun, it remains in the left bar menu forever and the checkbox remains checked after you submit.

Stage 5 Submenu

All checked menu selections have been saved on the **Stage 5 Submenu (A)** and are ready to use. Click on the left bar submenu selection to **Document the Wonder**.

Stage 5 Data Entry

Select a topic link from the left bar submenu. An entry page appears. Pages are similar for all activities. Enter the data and press the **Submit button**.

Stage 5 Confirmation

When you complete the entries and press the **Submit button**, on any entry page, a formal confirmation page will display.

A confirmation page displays your entries from the previous entry page. You may return to the entry page by pressing the submenu selection on the left bar submenu and make changes, continue to another submenu, or select a different stage from the main menu. You may also select **Printer Friendly Version (A)** which displays a similar page formatted for printing.

Stage 5 Printer Friendly Version

If the margin border lines do not print, turn your browser "background" printing on. Use Print Preview to evaluate the output — turn off headers and footers, and set the margins and page percent to fit your paper.

The **Printer Friendly Version** is perfect to print and post in a 3-ring binder to build your **My Special Life** book for your loved one with special needs to share with family members and friends. Below is the **Printer Friendly Version** for **Stage 5, My Mother**.

My Special Life®

My Mother

My Mother's Name

Jenny

Full-time Homemaker

Yes

Employed

No

Company

Type of Work

Work Address

Phone

Pager

Cell Phone

253-1234

Other

Interests And Hobbies

Likes to Bowl

Clubs And Organizations

Bowling Club

Medical History

The **Printer Friendly Version** opens in a separate browser window. After you print it, close the window to return to the application. If your account is associated with a Protected Tomorrows Advocate, his or her name and phone number is printed on the bottom right of the report .

Stage 5 Pictures

When you upload or reload any picture, it may be necessary to <u>refresh your browser</u> to have the picture display; otherwise your browser memory may hold the old picture and you will not see the new one.

The bottom of every Stage 5 entry page includes three **Picture fields** (**A**). You may add up to three pictures to your **My Special Life** book activity. The following guidelines apply to the pictures.

Choose pictures to upload.
Must be .gif or .jpg files. Max 400 by 400 pixels, 200kb.

A	Browse...
A	Browse... B
A	Browse...

SUBMIT   RESET

1) The pictures must be uploaded to your computer's hard drive.

2) The pictures may be up to 400 x 400 pixels and 200kb. Pictures taken with your digital camera are much larger. Scanned or camera digital files must be compressed to meet these requirements using Photoshop or the software that came with your camera. Refer to the instruction manual that came with your image software for specific instructions.

3) When you save the picture from your image software, save it as either .gif or .jpg file.

4) Once your pictures are prepared and uploaded to your computer's hard drive, click one of the **Browse buttons** (**B**). Find your picture (.gif or .jpg) on your hard drive, select it and press open. The picture location will be written in the **Picture field** next to the **Browse button**.

5) We recommend loading one picture at a time, however, if you are confident that your file structure is perfect, you may add up to three at a time.

6) When ready, press the **Submit button** to load the picture or pictures to your **My Special Life** book.

7) Refresh your browser each time a picture is replaced or added.

8) You may return to any entry page at any time to add additional pictures. You may change any picture by selecting one of the **Browse buttons** (**B**) and uploading a new picture. You may <u>not</u> delete any picture. If it is necessary to remove a picture, either replace it with another or replace it with a blank graphic.

Stage 5 Confirmation with Picture

When you click the **Submit button** from an entry page, a confirmation page appears. Now, in addition to the data you have entered, the pictures you have uploaded will be shown.

**Stage 5
Printer
Friendly
Version
with
Picture**

The **Printer Friendly Version** is perfect to print and post in a 3-ring binder to build your **My Special Life** book for your loved one with special needs to share with family members and friends. All uploaded images are included.

Notes
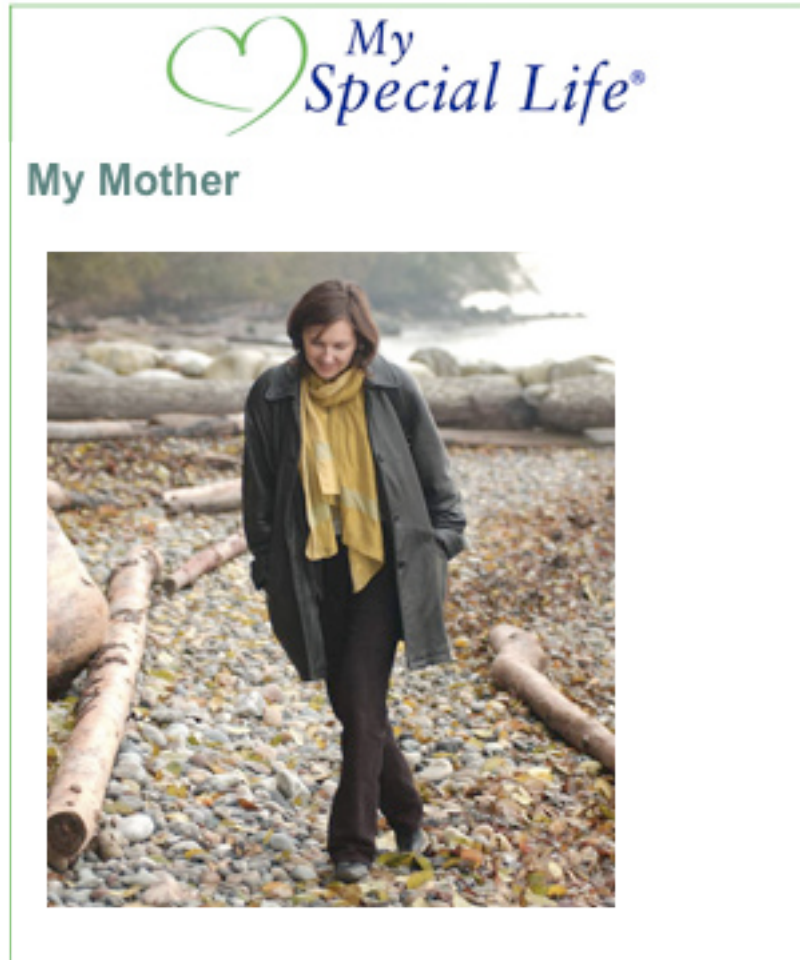
Appendices

Notes

Appendix A
Security

The data you enter in the online forms are protected by your Username and Password. All pages are secured to this level. You should make your password strong and never share it with anyone. However there is no guarantee that for the lifetime of your data that it is 100% perfectly secure. We strongly recommend that you do not enter personal data that would make it worthy for identity theft. Do not store a social security number or other valuable document numbers online. Refer to Appendix B for the **Confidential Information Form** provided in **Stage 5 - Document the Wonder**.

Appendix B
Confidential Information Form

We recommend you store all confidential data offline and in a safe place. This **Confidential Information Form** reflects all of the required confidential data referenced in and is available through the **Stage 5 - Document the Wonder** online pages.

My Special Life®

CONFIDENTIAL INFORMATION PAGE

Print this page!
Record confidential data called for in
Stage 5, Document the Wonder™
Store it in a secure place for safekeeping.

My Name _____

Date Last Updated _____ _____ _____ _____

_____ _____ _____ _____ _____ _____

GoTo: www.protectedtomorrows.com to access the complete My Special Life Workbook online

Client Manager User ID: _____
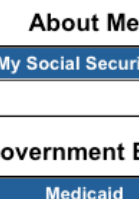
Password: _____

About Me

My Social Security #

My Government Benefits

Medicaid	
Case Number	
Recipient Number	
Caseload Number	
Social Security	
Claim Number	
Medicare	
Claim Number	

My Special Life®

CONFIDENTIAL INFORMATION PAGE 2

My Medications

Medications I Take	Prescribing Physician	Pharmacy	Dosage	Frequency	Purpose	Comments

Over-The-Counter Medications I Take	Purpose	Comments

Medications I Should NEVER Take	Reason	Comments

Appendix C
Stage 1-4, 6-8 Menu List

Stage 1
Take a Candid Look™
Initial Appraisal
Live With Your Family Member

Stage 2
Create the Future Map™
Vision
Implementation

Stage 3
Filter the Legal Options™
Naming the Money People
Beneficiaries
Coming of Age
The Future Care People
Family Plan
Estate Plan
Family Coordination

Stage 4
Capture Potential Benefits™
Entitlement
Abilities
Medical
Financial
Maintenance
More Programs

Stage 6
Begin the Transitions™
Vision
Key Players

Stage 7
Fund the Future™
Action Plan
Action Plan for Later

Stage 8
Review and Renew
Review
Renew

Appendix D
My Special Life Stage 5 Document the Wonder-Menu List

About My Family and Me

About Me
I Was Chosen for Adoption
My Mother
My Father
My Sisters
My Brothers
My Aunts, Uncles and Cousins
My Grandparents
Other Relatives and Friends We Trust
My Family Life At Home
My Family Life Away From Home
Our Special Family Traditions
Religious Preference
Religious Activities

My Daily Routine

My Daily Routine
My Personal Hygiene
Bathing
Eating Right
Sleeping
Sleep Issues
My Room
My Physical Therapy and Exercises
Special Equipment I Use
Home Care Helpers

More About Me

Support Groups and Resources
My Transportation
Travel

What I Can and Like To Do

I Can Do Many Things
My Favorite Activities
Outreach Programs
My Summer Activities
My Athletic Programs

My Friends

My Friends Are Great!
School Friends
My Neighborhood Friends
My Reactions to Animals
Community Awareness

Intervention Programs and Schools

Childhood Intervention Programs
My Pre-School
My School
My Teachers

Employment and Life Skills

My Day Programs/Workshops
My Employment
My Life Skills

My Disability and Medical Support

Description of My Disability
Additional Medical Background
My Allergies
My Primary Care Physician(s)
My Other Specialists
My Dental Information
Medical Personnel I Am Never To See
Medications
My Pharmacy and Hospital

My Emotional Well-being & Behaviors

My Emotional Well-Being
My Behavioral Information
My Personal Behaviors
My Social Behaviors
My Adult Behavior

Financial and Legal Issues

Important Documents and Their Locations
Advisors
My Guardianship
My Government Benefits
My Insurance Information
Financial Arrangements
My Residential Planning

Appendix E
Format-ting Data

There is a way to format your pages to make them more presentable. All fields will accept and display HTML code. HTML programming is beyond the scope of this manual. Appendix F shows a few basic codes that you can use. Below is an example of how simple HTML codes can enhance the look and readability of your **My Special Life** book.

Standard data input

Sisters (Names, Ages And Relationships)

```
· Carla, 34, lives in Florida
· Joan, 20, lives in England
· Mary, 30, lives next door and stops by every day to
see how I am doing
```

The standard output looks like this

Sisters (Names, Ages And Relationships)

• Carla, 34, lives in Florida • Joan, 20, lives in England • Mary, 30, lives next door and stops by every day to see how I am doing

HTML data input

Sisters (Names, Ages And Relationships)

```
· <b>Carla</b>, 34, lives in Florida<br>
· <b>Joan</b>, 20, lives in England<br>
· <b>Mary</b>, 30, lives next door and stops by every
day to see how I am doing
```

Using these few simply HTML codes, the output looks like this

Sisters (Names, Ages And Relationships)

• **Carla**, 34, lives in Florida
• **Joan**, 20, lives in England
• **Mary**, 30, lives next door and stops by every day to see how I am doing

Appendix F
Basic HTML Codes

<u>Formatting Text</u>

Bold Text   <B> </B>

    Ex: I <B>really</B> like this toy!   Result: I **really** like this toy.

Italics Text   <I> </I>

    Ex: I <I>really</I> like this toy!   Result: I *really* like this toy!

Underline Text   <U> </U>

    Ex: I <U>really</U> like this toy!   Result: I <u>really</u> like this toy!

<u>Formatting Paragraphs</u>

Carriage Return – New Line

    Ex: The brown fox jumped over the fence.
       The red fox jumped over the fence.

    Result: The brown fox jumped over the fence.
       The red fox jumped over the fence.

    *Same text without HTML
 Code:*

    Result: The brown fox jumped over the fence. The red fox jumped over the fence.

New Paragraph   <P>

    Ex: The brown fox jumped over the fence.
      <P>
      The red fox jumped over the fence.

    Result: The brown fox jumped over the fence.

       The red fox jumped over the fence.

    Same text without HTML <P> Code:

    Result: The brown fox jumped over the fence. The red fox jumped over the fence.

Link for more HTML codes: www.htmlcodetutorial.com or search the Internet for "html codes."

Appendix G
Help

Selecting the **Help button** from any page will open a new browser window and bring you to this Help page. Presently, you may download this user manual in Adobe pdf format. In the days to come, we will offer additional help, tutorials and tips. Visit often.