EasySteps Offline App Guidelines

(Available on iPhone and iPad Only)

How to Sync

- To sync, **Tap the blue cloud icon** at the top-right corner of your Offline App home screen.
- All data created in the Offline App **must be synced to the EasySteps server**.
- Syncing requires good internet connection. Please do not sync while driving.

Syncing: Why It Matters

- Documents are saved securely to the cloud for nightly backups.
- Claims are sent to EasySteps for billing.
- All notes and billing are available across all platforms of EasySteps.

One Offline App Only

- Each user ID may only have **ONE Offline App**. Using multiple offline devices or apps will result in lost data.
- *You can use multiple Online Apps without issue.*

Syncing Frequency

- We recommend syncing **at the <u>beginning</u> and <u>end</u> of each workday.**

Sync Duration

- Sync time varies depending on your internet speed and how much data you're syncing.
- Most syncs take a **few seconds to a few minutes.**

How Long Are Notes Viewable in the Offline App

- The Offline App stores notes from the **last 2–3 months only**.
- To access your complete charts, use the **Online App or Web Browser**.

Avoid Sync Timeouts

- If your device goes to sleep during a sync, it may not complete. This causes longer sync times and errors.
- Please optimize your device settings: **Settings > Display > Auto-Lock > 5 minutes**
- Even if your device times out mid-sync, **data is not lost**—but your next sync will be a longer, deep sync.

Syncs Must Complete Successfully

- Syncs with Warnings can be ignored.

What If a Sync is Interrupted?

- Interrupted syncs will resume and complete the next time you sync.
- Avoid aborting a sync as it may cause app corruption.
- Avoid syncing with unstable internet connection.

Sync Conflicts

- If a record is edited both online and offline, a **sync conflict** occurs. You **do not need to report it**—EasySteps is notified automatically and will resolve the conflict, usually the same day.
- If we resolve your sync conflict during business hours, we will send you friendly text reminder that the conflict is resolved and you can sync successfully. Please sync at your earliest convenience to accept the resolution. If you do not accept the resolution, you will continue to have the same sync conflict.

Supervisor-Assistant Syncing

- Important: To avoid sync conflicts, supervisors should work ONLINE when reviewing notes, making changes, and/or co-signing assistant notes.
- Assistants must sync **before** a supervisor can view their updates.
- Supervisors should sync **after** their assistant syncs to see their latest changes.

Version Updates

- EasySteps will offer your Offline App a new Version Update on occasion.
- These updates are to add new features into your Offline App and for any bug fixes.
- During a version update, your old offline app will be replaced with the new Offline App. This requires good WIFI and will take approximately 10 minutes to complete.

Bottom Line

- **Sync EVERY workday.** It keeps your data safe, up-to-date, and ready for billing.

How to Toggle from the Offline App to Online App

Working in the Offline App is designed for when you are out "in the field" without an internet connection. You will need to toggle to your online app anytime you want to access notes that are older than 3 months old and for billing reports. Toggling is super easy! Watch this short video to see how. https://youtu.be/IyGnzSzm0iU