FOCUS FAMILY

App Handbook

iPhone, iPad and Android – explained step by step

Version 1.4.0 · November 2026 · Software Notion

Contents

1. **Welcome**
    1. The basic principle: your data stays with you
    2. Your workflow in four steps
2. **Getting started**
    1. System requirements
    2. Installing the app
    3. The first start
    4. Sample data for trying things out
3. **The interface**
    1. The number on the app icon
4. **Today – your daily overview**
    1. The deadline radar
    2. Birthdays
    3. Data room
5. **Cases**
    1. Creating a case
    2. New case from a cover sheet
    3. Participants and addresses
    4. Opening a case automatically at its location
    5. Approved hours
    6. Archiving and reactivating
6. **Planning: appointments and tasks**
    1. Creating an appointment
    2. Recurring series
    3. Editing or deleting an appointment
    4. Prepare, run, follow up
    5. From appointment to time entry
    6. Tasks
7. **Goals, agreements and roadmap**
    1. Creating a goal
    2. Review points
    3. The roadmap
    4. Agreements
8. **Documentation**
    1. Writing documentation
    2. Dictate instead of typing
    3. Text snippets

4. Signatures under documentation
5. Reports for a period

9. Tools in the case

1. Child protection (§ 8a SGB VIII)
2. Development report (report assistant, Pro)
3. Genogram and eco-map (Pro)
4. Case cover sheet
5. Agreements in easy-read language (Pro)
6. Case vignette for supervision (Pro)

10. Media: photos, video, voice, sketches

1. Photos and video
2. Voice memos
3. Sketches and handwriting
4. Keeping entries private

11. Case file: every document of a case

1. Adding documents
2. Filling in forms
3. Scanning documents
4. Editing form entries
5. Record sheet and evidence data
6. Signing documents

12. Time tracking and activity records

1. Recording a time entry
2. Signature of those concerned
3. Entries from colleagues
4. Activity records
5. Identification and archive
6. Closed periods
7. E-invoice (XRechnung, ZUGFeRD)
8. Practice overview
9. Recording trips: Start trip now and Arrived
10. Correcting trips
11. Calculating travel time and distance

13. Export and document library

14. Sharing contact details

1. Your contact card
2. Passing on a cover arrangement
3. Ways to share
4. Recording the hand-over

15. **AI assistant (offline)**
16. **Finding a time with families**
    1. Calendars and commitments on the person
    2. Finding proposals
17. **Apple Watch, Live Activity and shortcuts**
    1. Apple Watch
    2. Live Activity and Dynamic Island
    3. Shortcuts and app icon
18. **Security and privacy**
    1. Protection against guessing
    2. Forgotten your PIN?
19. **Backup and restore**
20. **Server and team**
    1. Connecting the app
    2. Syncing and sharing
    3. Transferring a case
    4. Conflicts
    5. Disconnecting
21. **Licence and subscription**
22. **Help & contact**
23. **Settings at a glance**
24. **iPad and large screens**
25. **Frequently asked questions**
26. **Small glossary**

Welcome

Focus Family is your working companion for outreach social work – for supervised contact, family support work, educational assistance, outreach family work and flexible support.

This handbook explains the app on **iPhone, iPad and Android devices** in simple steps. No prior knowledge is required. Read it from front to back, or jump straight to the chapter you need.

> **Important:** Focus Family supports you with organisation and documentation. Your organisation's rules and the legal requirements always take precedence. The app makes **no** diagnoses, takes **no** legal decisions and assesses **no** person. The professional judgement is always yours.

The basic principle: your data stays with you

Focus Family is **local-first**. Your case data is stored **encrypted on your device**. There is no mandatory account, no cloud and no tracking. The app works 100 % without an internet connection.

Two things are **optional** and switched off by default:

- a **server connection** to your organisation so you can share cases in a team (chapter "Server and team"),
- an **AI assistant** that runs entirely offline on the device (chapter "AI assistant").

Your workflow in four steps

Step	What you do	Where in the app
Prepare	Review the key information, goals and open agreements before an appointment	Today → Prepare
Accompany	Capture observations, time markers and media during the appointment	Running appointment
Follow up	Note what mattered, the agreements and the next steps right afterwards	Follow-up
Document	Your notes become clean documentation you can export	Documentation & export

---

Getting started

System requirements

Device	Minimum version
iPhone, iPad	iOS 17 / iPadOS 17 or newer (the AI assistant requires iOS 26 with Apple Intelligence)
Apple Watch	watchOS 10 or newer, paired with an iPhone on iOS 17 or newer
Android	Android 9 (API 28) or newer

Installing the app

You get the app from the **App Store** (iPhone, iPad) or the **Google Play Store** (Android). If your organisation uses device management, the app is provided for you there.

The first start

A short onboarding greets you the first time. It explains the idea and sets up the app in seconds.

1. Tap through the intro screens.
2. Without a server the app works fully locally and without an account – this is the usual case. If your organisation runs its own server, tap **Sign in to server** or scan the **QR code** from your administration with the QR button next to the name field. Sign in (see "Server and team"); the close icon at the top takes you back at any time. After signing in, the onboarding shows "Connected" with your organisation's name, and your name is taken from the server.
3. Without a server, enter your **name** (practitioner name). It later appears as the letterhead in exported documents and can be changed at any time.
4. Set up the **app lock**: a **PIN with at least 6 digits** and – if your device supports it – **Face ID, Touch ID or a fingerprint**. This is strongly recommended because you work with sensitive data. If your organisation requires an app lock, the PIN is mandatory.
5. Tap **Let's go**.
6. **Optional:** The AI assistant can be enabled later in the settings.

Everything can be changed later under **More** → **Settings**.

Sample data for trying things out

If you would like to explore the app safely first, load the **sample data** under **More** → **Settings** → **About**. It contains fictitious cases, appointments and time entries. Delete it later with **Delete all data** before you create real cases.

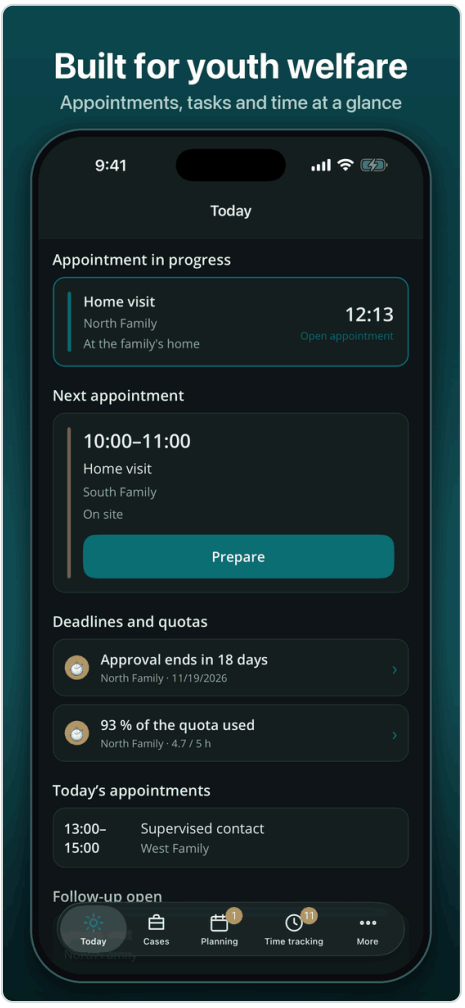
The interface

The app has **five tabs** at the bottom:

Tab	Content
Today	day overview: running appointment, next appointment, today's appointments, open follow-ups, tasks, work summary
Cases	all support cases with participants, goals, media and documents
Planning	appointments and tasks – together or separately
Time tracking	time entries, signatures, activity records
More	practice overview, AI assistant, text snippets, reports, backup, settings and more

Red numbers on a tab show open items: on **Planning** the overdue tasks and appointments, on **Time tracking** this week's open signatures, and on **More** synchronisation problems – open conflicts or a required

new sign-in to the server.



The Today view shows the running appointment with its live timer, the next appointment and today's tasks.

The number on the app icon

The app icon on the home screen shows the **sum of the tab numbers**: overdue tasks and appointments, open signatures and synchronisation problems. That way you can see whether something needs attention without opening the app. The number reveals no case content.

- **iPhone and iPad:** the number appears when Focus Family may send notifications and **Badges** are switched on in the iOS settings under **Notifications** → **Focus Family**.
- **Android:** Android only shows a number on the app icon together with a notification. The app therefore posts a **silent notification**, for example "3 items need attention in Focus Family" – no sound, no vibration and no case content (notification channel **Attention counter**). This only works when the app is allowed to send notifications. Whether the launcher shows a number or just a dot depends on the device.

Today – your daily overview

The **Today** view opens at start-up and shows, in this order:

- **Running appointment** – as soon as one is running, with a live timer and a way back into it.

- **Next appointment** – with **Prepare** and, if an address is stored, **Navigate**.
- **Deadlines and quotas** – the deadline radar: approvals ending, upcoming help plan meetings, reviews due and hour quotas running low (see below).
- **Today's appointments** – everything planned for the day.
- **Follow-up open** – appointments that still need to be wrapped up.
- **Tasks** – what is due today and next.
- **Work summary** – contact time, travel time and open documentation.

Tap any entry to jump straight there.

Today's appointments, **Follow-up open** and **Tasks** each show up to 5 entries. If there are more, **Show all (n)** opens the complete list; n is the number of all entries. The **Open docs** tile in the work summary also opens this list when several follow-ups are open.

The deadline radar

The app keeps evaluating your cases and shows what needs your attention soon. The radar is included in the free version.

Notice	When it appears
Approval ends	6 weeks before the end of the approval period; red from 14 days
Approval expired	up to 30 days after the end, as long as the case is active
Help plan meeting	3 weeks before a planned help plan meeting; highlighted from 7 days
Help plan review due	when a date for the next review was set at the last meeting and no new meeting is planned yet
Quota	from 80 % used, red when exceeded; for a total quota also a **forecast** of when it runs out at the current pace

It is based on the case details (approval period, quota) and the help plan meetings. The same notices appear at the top of the case view.

Birthdays

If a participant of an active or paused case has a date of birth (edit participant → **Date of birth**), **Today** shows the birthdays of the next 7 days with date, age and case. **More** → **Birthdays** lists all birthdays by month, starting with the current month; tapping one opens the case. Deceased and inactive participants are not shown.

On the birthday the app reminds you by notification at 8 am. Names never appear in the notification, only the number of birthdays and – if **case alias in notifications** is switched on – the case. You can turn the reminder off under **Settings** → **Working time** → **Birthday reminders**. The birthday features are included in the free version.

Reminders by notification (Pro): with Professional or an organisation licence the app also reminds you by notification – 4 weeks and 1 week before an approval ends, and 1 week and 1 day before a help plan meeting, each at 9 am. The notification only names the case if you have switched on **case alias in**

notifications in the settings. You can turn the reminders off under **Settings** → **Working time** → **Deadline reminders**.

Data room

With a server connection, **More** → **Data room** shows the forms, templates and service instructions the provider shares from a network drive or WebDAV server. Tap a folder to open it, **Back** goes up one level; a document is downloaded and opened in the preview. Documents are read-only and every opening is logged by the provider. If the provider allows offline copies, swiping left stores the document encrypted on the device; it is then available under **Available offline** without a network and protected by the app lock. When the provider stops sharing the source, the copies disappear at the next refresh, as they do when all data is deleted or the server connection is removed.

Cases

Cases holds all your ongoing support work. The list is sorted alphabetically; the search finds a case instantly.

Creating a case

1. Open the **Cases** tab, tap **New case** and choose **Create empty case**. (**From case cover sheet …** takes the details from an existing document – see the next section.)
2. Give the case an **alias** – for example "North Family" or "Case 26-014". That keeps it pseudonymous in everyday use.
3. Add the **file number**, the **type of support** (supervised contact, family support, educational assistance, flexible support, counselling, network/help plan meeting, outreach family work, school accompaniment or your own wording), the **start** and, if known, the **end**.
4. Pick a **colour**. It appears in lists and in the calendar.
5. Enter the **address** and the **responsible office**. The address is automatically suggested as the **location** for new appointments.
6. Under **youth welfare officer**, store the name and contact of the responsible person at the youth welfare office. This appears in the header of the activity record.
7. Tap **Save**.

New case from a cover sheet

If a case cover sheet, a referral or another document already exists, you do not have to type the case and its participants:

1. Under **Cases**, tap **New case** → **From case cover sheet …**.
2. Choose the source: **Choose file** (PDF, Word `.docx`, Excel `.xlsx`, CSV, text or image) or **Photograph / scan** to capture a paper document with the camera. The app cannot read Pages files – export them from Pages as PDF or `.docx` first. PDF files with permission restrictions are read; PDF files that need a password to open are not – use a version without a password instead.
3. **Optional (Pro):** switch on **Use local AI**. Under **Instruction to the AI** you can also describe in your own words what should be created, for example "Set up a new family: mother Anna Sample, son Ben

(8), family support from 1 October." An instruction also works without a document.

4. Tap **Analyse**. The analysis runs entirely on the device.
5. In the **review step**, check every recognised detail and correct it if needed: the **case** (case name, type of support, start, file number, responsible office, responsible caseworker at the office), the **participants** with their roles and the **addresses**. Under **Questions** you clarify what the app could not recognise reliably; questions marked * must be answered.
6. Switch off people who do not belong to the case – they are then not imported.
7. The suggested **case name** may contain a real name. Replace it with an alias if needed.
8. **File source document in the case file** (on by default) stores the original in the new case. Nothing is saved until you tap **Create case**.

> **Limits of the AI:** the local AI only adds details that actually appear in the document or in your instruction. Values that do not appear there are discarded. Details added by the AI are marked. Text recognition and AI can still be wrong – always check the result before creating the case.

Participants and addresses

Under **Participants** you record the people involved with their **role**, phone, e-mail and address. You can call or write to a person straight from the app by tapping the number or the address.

Roles: besides child, mother, father, foster carer, reference person, legal guardian and the network roles (youth welfare office, school, daycare, therapeutic service, counselling centre, network partner) you can choose:

- family: **sibling**, **half-sibling**, **grandmother**, **grandfather**, **aunt**, **uncle**, **step-parent**, **partner of a parent**, **cousin** and **other relative**,
- network: **youth welfare provider**.

For half-siblings, grandparents, aunt, uncle and cousin the **family side** appears as well – **maternal** or **paternal**. It is then shown in lists and documents too, for example "Grandmother (maternal)".

Is a minor marks children and adolescents. The role sets sensible defaults you can change – such as "Is a minor" for "Child" or the gender for "Mother" and "Grandfather".

Further details: Show opens additional fields: **gender**, **place of birth**, **date of death**, **nationality**, **marital status**, **health insurance**, **child benefit number** and **institution / office**. The heading shows how many of them are filled in. For network roles the institution appears in the main part. The date of death may not lie before the date of birth. The genogram and the case cover sheet use these details.

Phone numbers carry a type: **Mobile (private)**, **Mobile (work)**, **Landline (private)**, **Landline (work)** or **Other**.

Addresses: people who live at the same place are grouped under one **address** – if the parents live apart, that gives two addresses. In the participant dialog, pick an existing one under **Address** or create a new one right there with **New address …** (name and address). It is created together with the person when you save and added to the case; **Discard** removes it again beforehand. As long as **Use the selected address** is switched on, the address of the selected address entry applies. Only when you switch it off do the fields for the person's own address appear. Participants without an address are listed under **No address**.

The app checks addresses when saving: a German postal code has five digits, a street needs a postal code and town, a house number needs a street. A town on its own is allowed.

Opening a case automatically at its location

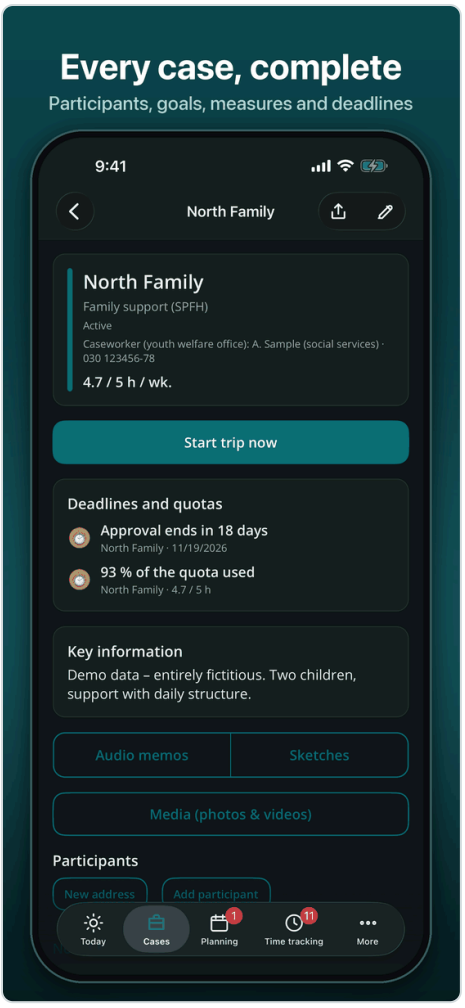
If you are out and about a lot, the app can open the matching case for you: when you are at a case's address and open the app (or return to it), that case's detail view appears directly. The feature is **off by default**; turn it on under **More** → **Settings** → **Assistance** → **Open case at current location automatically**.

- Before it is turned on, the app explains what the location is used for and then asks for the **While Using the App** permission. If you decline, the feature stays off.
- Your current location is only compared with the addresses on the device; it is neither stored nor transmitted.
- To make the comparison possible, the app converts the addresses of active cases into coordinates once using the operating system's geocoding service (Apple on iPhone, Google on Android). Only street, house number, postal code and city are sent – no names and no case data. The coordinates are stored encrypted on the device and are **not** synchronised with the server. They are deleted when you turn the feature off.
- **Without the geocoding service:** open an address for editing, tap **Use current location for this address** while you are there, then **Save**. Manually applied coordinates take precedence. If the address changes, the coordinates expire automatically.

A case is only opened when all conditions are met: the app is unlocked, you are on a main page (not editing or in a dialog), your location is available within a few seconds with sufficient accuracy (at most 100 m deviation), and the address of **exactly one** active case lies within 150 m. If several cases or none match, nothing happens. The same case is not opened automatically again within 30 minutes.

Approved hours

Enter the approved **hours quota** and the **quota period** (total, daily, weekly, monthly or yearly). The case overview then always shows how much has been used – for example "3.8 / 5 h / week".



The open case: header data with the quota, key information, quick access to media and the participants by address.

Under **Appointments** the case view shows up to 10 appointments: upcoming ones first (the next one at the top), then the most recent past ones. Under **Documentation** the 10 newest entries appear. If there are more, **Show all (n)** opens the complete list.

Archiving and reactivating

When support ends, open the case and tap **Archive**. Archived cases disappear from the list but are fully preserved. **Show archived** brings them back, and **Reactivate case** returns them to active status.

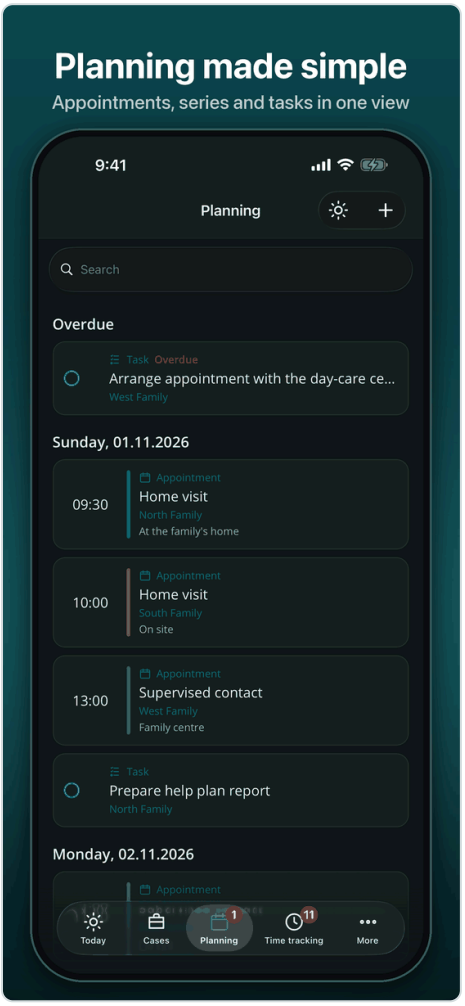
Planning: appointments and tasks

The **Planning** tab brings calendar and tasks together. Switch between three views at the top:

- **Overview** (default) – **overdue** items first (overdue tasks and overdue appointments from previous days), then appointments and tasks **grouped by day**, and finally **without date**. Completed tasks are not shown here.
- **Appointments** – appointments only; overdue appointments from previous days are listed at the top under **Overdue**.
- **Tasks** – tasks only, grouped into Overdue, Today, Upcoming, No date and Done.

The **search** applies to the active view. **New** lets you create either an **appointment** or a **task**.

A planned appointment that has not started is **overdue** as soon as its end time has passed – on the same day, too. A task is overdue when its due date has passed or, on the due date, its due time has passed. Such entries carry the red **Overdue** label in Planning, Today and the case. The app considers overdue appointments up to 30 days back; they also count towards the red number on the **Planning** tab and on the app icon.



The overview shows appointments and tasks together – overdue items first, then day by day.

Creating an appointment

1. Tap **New** → **Appointment** (also possible directly from a case).
2. Choose the **type**: home visit, supervised contact, handover, help plan meeting, phone call, network meeting and more.
3. Set **date**, **from** and **to**.
4. The **location** is pre-filled with the case address and can be adjusted.
5. The **reminder (minutes before)** is prefilled with the value from the settings (30 minutes); clear the field if you do not want a reminder.
6. Tap **Save**.

The app reminds you by notification of every planned appointment in the next 14 days that has a reminder or a travel time – including appointments created on another device or in the desktop app and synced. The

notification appears at the set time before the start, plus the travel time, and only names the case if **case alias in notifications** is switched on.

Recurring series

Create repeating appointments once:

1. Switch on **Repeat** in the appointment editor.
2. Choose **daily**, **weekly** (with weekdays and "every N weeks", e.g. the weekly family visit) or **monthly**.
3. Set the end: **until date** or **number of appointments**. A series covers at most 180 appointments over at most 3 years. A summary such as "Every week on Tue · until 22/12/2026" shows the rule.

When you **edit or delete** an appointment from a series, the app asks: **this appointment only**, **this and following** or **the whole series**. Appointments that already took place or were documented are always preserved.

Editing or deleting an appointment

Open the appointment and tap **Edit** (pencil at the top right or the button at the bottom). The editor lets you change everything; **Delete appointment** removes a single appointment after a confirmation. Appointments with a **signature**, **time entries** or **documentation** cannot be deleted – the app names the reason so that no records are lost. Delete series appointments with **Delete series**.

Prepare, run, follow up

Prepare: Open the appointment and tap **Prepare**. You see the last documentation, open agreements and the current goals – and can write a **preparation note**.

Run:

1. Tap **Start appointment**. The **running appointment** opens and the timer starts.
2. Capture important moments with **Add time marker** – observation, agreement or next step, optionally with a short description.
3. Under **Capture for this appointment** you record a **photo/video**, an **audio** memo, a **sketch** or a **document** for the case. Every capture is linked to the appointment: it appears with its time in the log of the running appointment and carries the note **Appointment** with date and type in the media, audio, sketch and case file lists.
4. The appointment keeps running when you switch to other areas: a floating indicator with the elapsed time and the appointment type stays at the edge of the screen. You can drag it to the left or right edge; tapping it opens the running appointment. It shows no names or cases and is hidden while the app is locked or in the background.
5. Tap **End appointment** when you are done.

Follow up:

1. The **follow-up** opens. Check the **duration** and enter **travel (km)** and **travel time (minutes)**.
2. Answer the short questions: What mattered today? Which agreements were made? What are the next steps? Is anything still open?
3. **Optional:** With **Service record signature** the family can countersign directly on the device. The signature automatically applies to the time entry created from the appointment.

4. Tap **Create documentation** to turn this into progress documentation.

From appointment to time entry

Preparation and follow-up both offer **Create time entry**. One tap creates a time entry with the actual (otherwise the planned) duration – with **Undo** right in the confirmation. At most one entry per appointment is created; a second tap opens the existing one. Ending a running appointment uses the same mechanism.

Tasks

1. Tap **New** → **Task**.
2. Enter a **title** and optionally a **description**.
3. Set a **due** date and the **priority** (low, normal, high).
4. Assign it to a case if useful and **save**.
5. Tick completed tasks off in the list.

Tapping a task opens it for **editing**; **Delete task** removes it after a confirmation.

Goals, agreements and roadmap

For every case you record **goals** and document how they develop.

Creating a goal

1. Open the case and tap **New goal** under **Goals**.
2. Enter a **title** and a **description**.
3. Choose the **status**: planned, active, paused, achieved or ended.
4. Optional: switch on **set target date** and pick a date.
5. Add **sub-goals** to break a large goal into steps.
6. Under **History**, use **Add history entry** to document what has happened.

Review points

Review points are help plan meetings, interim or final reviews. You create them in the case under **Review points**: date, type, title, summary, next appointment and status (planned, held, cancelled). An appointment of the type **help plan meeting** automatically appears as a review point.

Every goal can have a **predecessor goal** (goal → goal → goal) and can be linked to a review point. Achieved goals get an **achieved on** date.

The roadmap

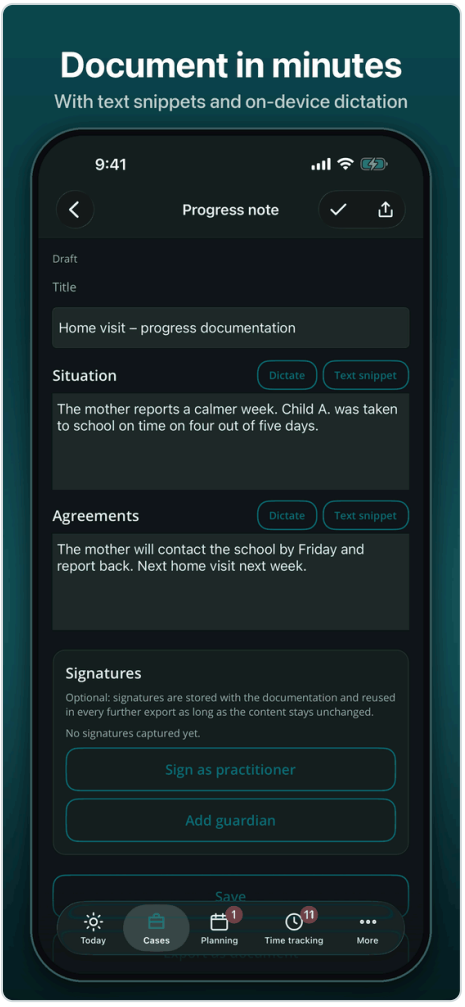
The **roadmap** card in the case turns this into a timeline: goal tracks from the start to the target date or to "achieved", review points as markers, and below them your recorded time per week or month including the quota line. One look tells you where the support stands.

Agreements

Agreements from appointments (who does what by when) automatically reappear during the next preparation so nothing gets lost.

Documentation

Your work turns into **documentation**, found in the case under **Documentation**.



The editor: dictate or insert a text snippet per section. Signatures are collected at the bottom.

Writing documentation

1. Create it from the follow-up (**Create documentation**) or directly in the case.
2. Choose a type: progress documentation, contact documentation, conversation note, phone note or help plan meeting.
3. Edit the **title** and the sections. Documentation starts as a **draft**.
4. **Complete documentation** sets it to **finalised**. Editing afterwards is possible – the app asks first.

Dictate instead of typing

Every section offers **Dictate**. Speech recognition runs **on the device**; your content is never transmitted. Speak, then check and correct the text.

Text snippets

Text snippet inserts recurring wording. There are three levels:

- **personal** snippets that only you see,
- **team** snippets,
- **organisation** snippets distributed centrally by your organisation.

You maintain your own snippets under **More** → **Text snippets**. Pick a **category** (e.g. documentation or activity record) so the snippet is offered in the right place. Each title may appear only once – also not equal to an organisation snippet you can see; the app then names the origin of the existing snippet. If two snippets still share a title, the selection shows their origin, e.g. "Greeting · Organisation".

Signatures under documentation

In the **Signatures** section, the practitioner and legal guardians sign directly on screen. The signatures are stored with the documentation and carried into every later export as long as the content stays unchanged. If the text changes, the app tells you.

Reports for a period

Under **More** → **Reports** you create a report covering a period:

1. Choose **Create report**.
2. Set **from** and **to**.
3. Under **Select content**, decide what to include: contacts and progress, agreements, goals, notable events, network contacts, help plan meetings.
4. **Analyse** collects the matching content. You can then edit and export the report.

Tools in the case

At the bottom of the case view, **Tools** offers help for typical tasks around the case.

Child protection (§ 8a SGB VIII)

Child protection (§ 8a) guides you step by step through a structured risk assessment. It is included in the free version.

1. **Occasion:** date and children concerned (prefilled from the participants).
2. **Significant indications:** tick categories (e.g. neglect, abuse, domestic violence, a parent's addiction or mental illness, statements by the child) and describe the observations – facts kept separate from evaluations, with source and time.
3. **Assessment and specialist advice:** choose the result (no risk, need for support, latent or acute risk) and give reasons. From "latent" the app reminds you to consult a **child protection specialist** (insoweit erfahrene Fachkraft) and asks for name and date of the consultation.
4. **Involvement:** whether guardians and child were involved – if not, with a reason (for instance because effective protection would otherwise be at risk).

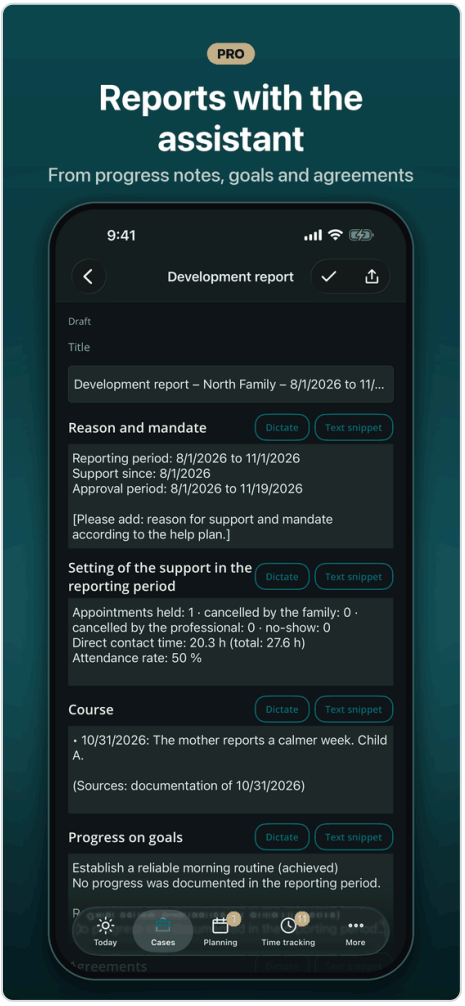
5. **Protection plan and support:** support offered, protection agreements (who, what, by when) and a **review date**.
6. **Informing the youth welfare office:** whether, when and through whom it was informed.

In case of **acute risk**, a red notice with the button **Call police (110)** appears at the top. Before saving, the app checks whether essential details are missing; you can still save and complete them later. It saves documentation of the type **Child protection assessment (§ 8a)** with all six steps. It also creates **follow-up tasks**: the review on the chosen date, "Consult child protection specialist" if the consultation is missing, and "Inform youth welfare office (§ 8a)" in case of acute risk without information – each with high priority.

> Every assessment is a separate piece of documentation. Once finalised it cannot be changed; for a reassessment you create a new one. This gives you a complete chronology. Child protection assessments are **not** included in development or period reports, nor in case vignettes. The feature does not replace the procedure agreed between your organisation and the youth welfare office.

Development report (report assistant, Pro)

Create development report compiles a structured report draft for a period of your choice (prefilled: approval period or the last six months):



The report assistant structures the draft and backs the course with source references.

- **Reason and mandate** with approval period and responsible youth welfare office,

- **Setting of the support**: appointments held, cancelled and missed, attendance rate, contact time,
- **Course** from your documentation – with dates as **sources**,
- **Progress on goals** with status, steps, progress entries and related agreements,
- **Agreements**, **Professional assessment** and **Recommendation and outlook** (with the next help plan meeting).

If the offline AI is available you can switch on **Pre-write with offline AI**: course and goal development are then summarised as running text; the source references remain, and a note reminds you to review professionally. **Professional assessment** and **Recommendation** deliberately stay placeholders for your own evaluation. The draft is created as documentation of the type **Development report** and opens for editing; you export it like any other documentation.

Genogram and eco-map (Pro)

From participants, roles, further details and addresses the app automatically draws a genogram with an eco-map:

- **Generations:** grandparents at the top, parents in the middle, children below – together with siblings, half-siblings and cousins.
- **Sides:** maternal relatives are placed on the left, paternal relatives on the right.
- **Shapes:** circle = female, square = male, rounded = not specified or diverse, capsule = institution. The gender from the further details decides, otherwise the role. **Deceased** people carry a cross and the year of death, for example "† 2019".
- **Lines:** solid = partnership or parent–child; double slash = **separated partnership** (parents at different addresses); dashed = **cohabitation** (partner of a parent) or network contact; dotted = **care** (foster carer, legal guardian or reference person to the children).
- **Frames:** people who live at the same address share a frame ("Address 1", "Address 2" or the name of the address). People without a shared address appear dashed under **Other address**.
- **Network:** the services involved (youth welfare office, school, daycare, counselling, youth welfare provider …) are arranged in a circle around them.

Below the map:

- Switching off **Show names** replaces names with roles ("Child 1", "Mother") and the frames with "Address 1", "Address 2" – for supervision, for example. The PDF export then contains neither the case name nor the file reference, not even in the file name.
- **Export as PDF** creates a sheet with map and legend.
- **As case cover sheet (table)** creates a tabular case cover sheet from the same details (see the next section).
- **Add to case media** puts the map into the case media as an image. There you can annotate it with a pen like any photo.

The map is always as current as the participants in the case.

Case cover sheet

Case cover sheet under **Tools** creates a tabular front sheet for the case file as youth welfare offices keep it: youth welfare office, place, date and file number in the header, followed by the young people, mother and

father, siblings and other participants – split by shared and other address. It is based on the participants' details (including the further details) and the addresses.

1. Choose the **formats**: **PDF** and/or **DOCX** (for further editing).
2. Enter a **place** if needed.
3. With **Show names** switched off, the sheet is pseudonymised: roles replace the names, the file number and the name of the youth office caseworker are left out, only the town remains of the address and only the year of the birth date. Phone numbers, e-mail addresses, place of birth, health insurance and child benefit number are not included. The sheet is then marked **pseudonymized**, and the file name only contains "Case cover sheet" and the date.
4. **File in the case file** also stores the sheet as a **case cover sheet** document in the case.
5. Check the result with **Preview (PDF)** and tap **Share** or **Save**.

> The case cover sheet is not the same as the **record sheet** that the case file keeps for every document (version, checksum, timestamps).

Agreements in easy-read language (Pro)

Compiles open goals and agreements in simple words – as a sheet for the family with "What?", "Who?", "By when?", the next meeting and signature fields for family and professional. Every text can be adjusted before export; with the offline AI available, **Simplify with offline AI** simplifies the wording further. The export uses the **Family** profile; internal notes and assessments are left out.

Case vignette for supervision (Pro)

Creates a pseudonymised summary for supervision and peer consultation: names are replaced by roles ("Mother", "Child 1"), phone numbers, email addresses and exact dates removed, child protection assessments left out. It contains the situation (type of support, duration, family with ages), goals, the latest contacts (month and year only) and open agreements – plus your **question**. The export additionally uses the **Supervision / consultation** profile. Before sharing, still check whether the family could be identified from the content.

Media: photos, video, voice, sketches

All media is stored **encrypted** inside the case.

Photos and video

1. Open **Media** in the case.
2. **Capture** starts the camera, **Import** takes over existing files.

Editing a photo: Open it and choose **Edit image (crop / annotate)** to crop the frame and add markings or notes with the pen.

Trimming and marking video:

1. Open the video. **Start here** and **End here** define the section; **Save trim** stores it.

2. During playback, tap **+ Marker** at important moments and add a **note**. This is ideal for Marte Meo work to find key moments again.

Voice memos

1. Open **Voice memos** in the case and tap **Start recording**.
2. **Stop recording** saves the memo encrypted. Tap it to listen.
3. Under **Transcript**, **Convert now** turns speech into text – **entirely offline on the device**.
4. **Structure and apply** (Pro) turns the transcript into structured documentation: **observation**, **approach and intervention**, **professional assessment**, **agreements** and **next steps**. If the offline AI is available it sorts the text; otherwise a rule-based recognition on the device does the job.
5. On the review page you correct the sections. Detected agreements and next steps are preselected: selected agreements become **open agreements** in the case, selected steps become **tasks**. **Create documentation** then opens the finished draft.

> Typical flow: dictate in the car after the home visit, **Convert now**, **Structure and apply** – the documentation is ready within minutes and no agreement gets lost.

Sketches and handwriting

Sketches let you draw genograms, room plans or network maps – with Apple Pencil, another stylus or your finger.

1. Open **Sketches** in the case and tap **New sketch**.
2. Choose pen colour and width and start drawing.
3. **Undo** removes the last stroke, **Clear** empties the canvas.
4. The **"•••" menu** offers the **paper**: plain, lined, narrow lined or squared.
5. Give it a **title** and tap **Save**.

Text recognition: handwriting can be converted into text – also on the device.

Keeping entries private

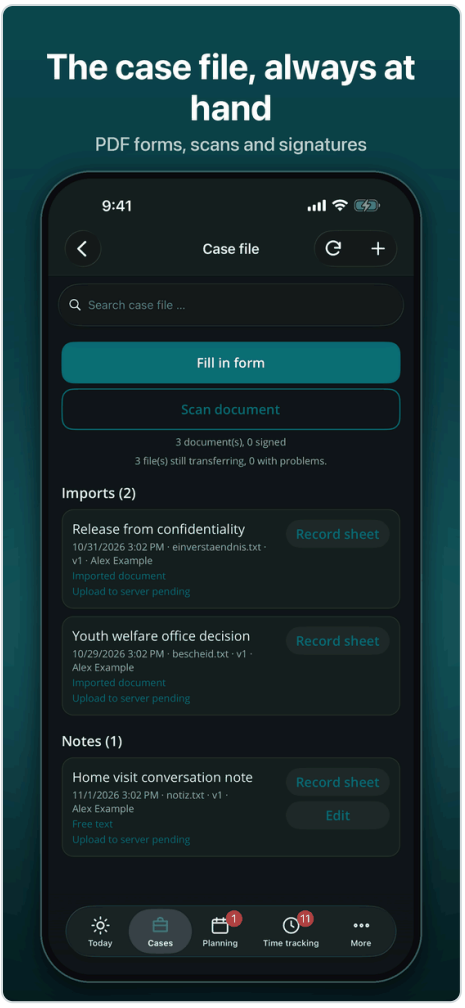
Voice memos, sketches, photos and videos can be marked **private**:

1. Swipe the entry sideways in the list.
2. Tap **Private**; to release it, swipe again and tap **Public**.

Private entries carry a **lock symbol**. They stay **with you only**: they sync solely to your own devices and are visible neither to the team nor in your organisation's admin panel.

Case file: every document of a case

The **case file** collects everything that belongs to a case as a document – imports, notes, completed forms and generated reports. Open it in the case via **Case file**.



The case file is organised by section. Every document carries a record sheet with version, checksum and timestamps.

Sort by orders the documents within each section by **Reference date** (default), **Created**, **Modified**, **Name** or **Document type**; the search field at the top filters by name, file, template, signers and document type. The **reference date** is the day a document refers to – for documentation entered later its date, not the day it was saved; for forms the document date, otherwise the day it was created. When it differs from the creation day it is shown in the row.

Adding documents

+ offers:

- **Scan document** – capture paper documents with the camera (see below).
- **Import document** – PDFs, images or office files from the device. For photos and PDFs the app recognises the text so you can find the content again through search.
- **Free-text note** – a short note written directly in the app.
- **Handwritten note** – written with pen or finger.

Filling in forms

If your organisation provides PDF forms, tap **Fill in form**:

1. Choose the template.
2. Fill in the fields on screen. Known details from the case are pre-filled.

3. Collect a signature if needed and **save**.

The completed form becomes its own document in the case file – the template stays unchanged. Forms with permission restrictions (for example from public authorities) can be filled in and signed; the result is a normal PDF file without protection.

Scanning documents

Scan document turns paper documents into a searchable PDF in the case file:

1. In the case file, tap **Scan document** (also available under **+**).
2. Hold the camera over the page. The camera detects the **edges of the page**, straightens it and crops it – on iPhone and iPad with the system document camera, on Android with Google's document scanner. Capture as many pages as you need and finish the scan.
3. Enter a **name** (leave it empty to use the suggestion "Scan" with the date) and choose the **case file section**.
4. The app combines the pages into a PDF, recognises the text **on the device** and files the document. A message tells you on how many pages text was recognised; search then finds the content later.

If the document scanner is not available on a device, the app takes the pages one after another as photos (**Another page**, **Done**). Scanning, text recognition and filing work without internet.

Editing form entries

A completed form can be corrected later without losing the filed version:

1. In the case file, tap **Edit** on the form entry. The fields are pre-filled with the filed version.
2. Change the details and tap **Save new version**. A **new version** is created; the previous one stays unchanged in the **history**.
3. **Signatures:** changed details discard the existing signatures. The app tells you how many beforehand and asks for confirmation. As long as the details are unchanged, the signatures are kept and further signatures can be **added**. If the case data has changed since signing, the app points out that a new version discards the signatures.
4. Without changes no new version is created.

The case file shows the current version. **Older versions (n)** opens the history with version number, date and number of signatures.

Record sheet and evidence data

Every document has a **record sheet** showing name, section, document type, status, version, timestamps, author and – for every file – name, format, size and **checksum (SHA-256)**. This makes it possible to prove later that a document is unchanged.

Signing documents

Sign collects signatures – from the practitioner and from legal guardians. Signed documents are protected against changes; necessary corrections create a new version – for forms via **Edit** (see "Editing form entries").

Time tracking and activity records

Time tracking has its own tab with three views:

- **Overview** – the current month (contact, travel and documentation time, kilometres), quick capture and your **open signatures**.
- **Entries** – all time entries with a **total**; locked and signed entries are marked.
- **Records** – your activity records.

Recording a time entry

1. Tap **Record time** in the overview.
2. Choose the **activity type**: client contact (in person), travel time, documentation, phone call and more.
3. Set the **date** and **from/to** or the **minutes**.
4. Assign the entry to a **case** (or choose **no case**).
5. The **contact type** (client contact or indirect) follows from the activity type and can be changed per entry. The record uses it to calculate the share of direct contact.
6. Under **Activity**, describe what you did. The **phrase catalogue** offers ready-made sentences from the groups upbringing, daily structure, emotional and psychological stabilisation, social skills and network work. Several phrases are joined with "; ". Your own snippets of the category **activity record** appear in the catalogue too. The catalogue is always available offline.
7. **Save**.

Signature of those concerned

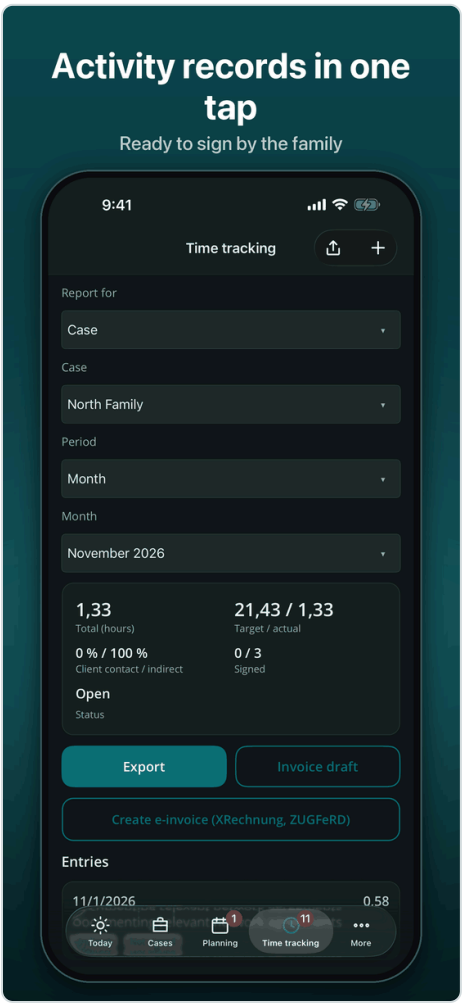
In the time entry and in the appointment follow-up, the people concerned can sign on screen via **Collect signature**: name, role and signature with finger or pen.

- The app freezes **what** was signed (case, appointment, times) and protects it with a **checksum**.
- A signature is **never mandatory**. Without one the entry is marked **not signed**; if it is explicitly refused, record **refused**.
- A signature collected at the appointment automatically applies to the time entry created from it.
- **View signature** shows the stored image, the frozen summary and the result of the checksum check.
- If you change date, times, minutes, activity or case on a signed entry, the signature is **reset** and the entry counts as not signed again.

Entries from colleagues

In shared cases you also see other people's time entries. They are **read-only** for you; only the practitioner can change them. Corrections to other people's entries are made exclusively by management in the admin panel – and are logged. Your own practitioner record only ever contains your own entries.

Activity records



The record shows key figures and the individual lines and exports as PDF, spreadsheet or CSV.

1. In the **Records** view choose **case** or **practitioner** (all your cases) and the period **month**, **year** or **total**.
2. The app shows key figures: total hours, **target/actual** from the quota, share of client contact and indirect work in percent, signature rate and status.
3. Below are the individual lines: date · case or practitioner · time from–to · activity · hours · contact type · signature. Yearly and total records are grouped by month, practitioner records by case.
4. **Export** produces the record as **PDF**, **XLSX** or **CSV**. It is stored in the document library and can be linked to the case.
5. **Invoice draft** prepares billing from a case record with the funding body and items per activity type. Amounts only appear if your organisation granted you that right.

Identification and archive

Every exported record carries a **record number** (`TN–<year>–<device code>–<sequence>`), the **export time**, a **version**, a **SHA-256 checksum** and a **QR code** – in PDF and Word in the footer of every page, in Excel on the **Identification** sheet, in CSV in the **Identification** block at the end of the file (the column headings stay in the first line). If the same record is exported again, the version increases and the document names the previous version. The app shows the number after the export. Identification also works offline; the preview does not use up a number.

If the app is connected to a server, the finished export is additionally filed encrypted in the administration's record archive – buffered while offline and uploaded with the next synchronisation. Records of cases that have since been deleted on the device are no longer uploaded.

Closed periods

Your management can **close** past months or years in the admin panel:

- Entries inside a closed period carry a **lock**. They can no longer be changed, deleted or moved into the period. You can always read them.
- The **current month** and the **current year** can never be closed.
- If a correction is needed, ask management to reopen the period with a reason.
- If you changed something offline that has meanwhile been closed, the app creates a **conflict**. You decide: **keep local** (the entry stays on your device only) or **discard** (your change is deleted).

E-invoice (XRechnung, ZUGFeRD)

German youth welfare offices and other public authorities increasingly only accept **e-invoices**. With Pro the app creates an **XRechnung 3.0** in UBL format or a **ZUGFeRD invoice** (ZUGFeRD 2.x / Factur-X, EN 16931 profile) from a case record.

1. Once, enter your details under **Settings** → **Organisation** → **Invoice issuer for e-invoices**: name, contact person, address, phone, email, **tax number** (or VAT ID), **IBAN**, the **VAT treatment** and the invoice numbers (prefix with the placeholders `{yyyy}` and `{mm}`, next number, payment term).
2. In **Records**, choose a case and a period and tap **Create e-invoice (XRechnung, ZUGFeRD)**.
3. If the case has several funding bodies in the period, choose the **Invoice recipient** at the top. Each invoice contains only that recipient's items; create a separate invoice for each funding body.
4. Enter the recipient's **Leitweg-ID** (provided by the youth welfare office or funding body). The app remembers it per recipient and takes name and address from the stored funding body.
5. At the top you see which mandatory details are still missing. Only when everything is complete does **Create and share XRechnung** produce the file.
6. Upload the XML file to the recipient's e-invoicing portal (e.g. ZRE, OZG-RE or your state portal) or send it by email if the recipient allows it. The invoice number then increments automatically.

ZUGFeRD: Create and share ZUGFeRD PDF produces two files from the same details: a readable invoice as **PDF/A-3** with the embedded file **factur-x.xml** (EN 16931 profile) and the same XML file separately. Both files are shared or saved together. ZUGFeRD suits recipients that accept a PDF invoice with machine-readable data; portals that explicitly require XRechnung still get the XRechnung. The same mandatory details and the same number range apply as for the XRechnung.

Invoice numbers: Each recipient gets its own number. If you create the invoice for the same recipient again, it keeps its number. The app rejects a number that has already been used for another recipient. Quantities are billed to the minute (one minute at €150 per hour gives €2.50), and every item is checked against the record.

VAT: child and youth welfare services are often VAT-exempt under **§ 4 No. 25 UStG**; there is also the **small-business scheme (§ 19 UStG)** as well as 19 % and 7 %. Please check the right setting with your tax adviser. Items without a stored rate are not included – maintain the **rate agreements** of the measure for them.

Provider billing basis: If the device is connected to your provider's server, the provider can set a billing basis (rate per specialist hour, billing increment and rounding, mileage rate, billable share of travel time, VAT). It appears under **Settings** → **Provider / organisation** with the note **"Set by the provider"**. New rate items are prefilled with it and remain editable. Time without a matching rate item appears in the invoice draft and e-invoice as "Specialist hour (default)" or "Travel time (default)"; kilometres from recorded trips as "Mileage allowance (default)" unless a kilometre item of the rate agreement applies on the trip date. The VAT treatment is then locked. Your own rate items remain authoritative; closed periods do not change. Without a server connection only your own settings and rate agreements apply. Kilometres of linked trips count automatically for items with the unit kilometre, each trip exactly once.

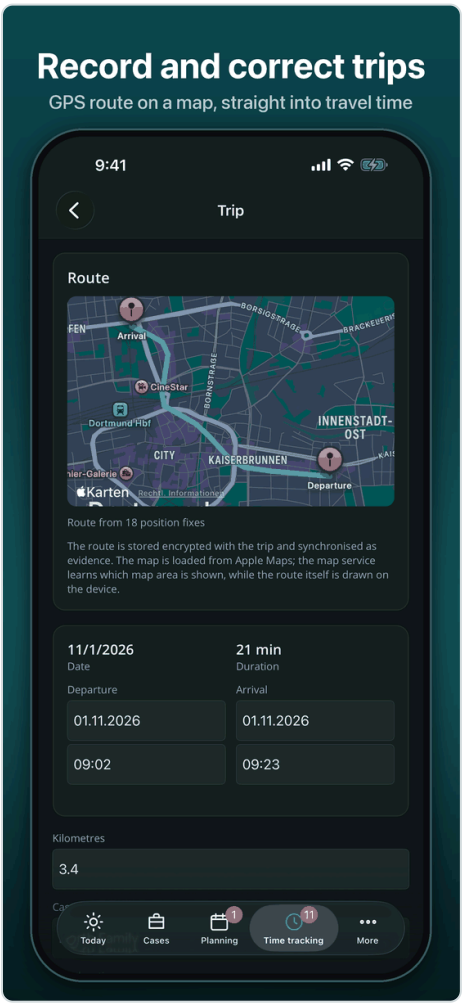
E-invoices with a server connection: If the device is connected to your provider's server, the provider maintains the invoice issuer (name, address, contact, tax number or VAT ID, bank details, invoice-number prefix, payment term) centrally. The local **Invoice issuer for e-invoices** settings are then hidden and can be neither viewed nor changed; the e-invoice automatically uses the central details. Only accounts with the permission **"Create e-invoices"** can create e-invoices – without it the button is hidden and the app shows "A permission is required for e-invoices." If the provider has not entered any details yet, the app reports "Invoicing details have not been set up yet." The central details are refreshed on every sync, cached encrypted on the device (usable offline as well) and deleted when the permission is withdrawn or the device is disconnected from the server. The prefix applies to all devices. Invoice numbers are unique across the organisation, even without a connection at creation time: on its first fetch of the invoicing details the server assigns each device a fixed **number series** (never reused, not even after a device is removed). Format: prefix + series (at least two digits) + `-` + four-digit counter, e.g. `TR-07-0001`, with the default prefix `RE-2026-07-0001`. The invoice number is assigned automatically from the device's series and cannot be edited by hand ("The invoice number is assigned automatically."). The device keeps the counter and the issued numbers encrypted; a number only counts as issued after it has been created and shared successfully – a cancelled or failed export does not use up a number. Before every export the app checks that the number belongs to its own series and has not been issued in that series before; an issued number is never reused, not even after a restart or when returning to an earlier series. The counter only moves forward and restarts at 1 only with a new series (e.g. after re-registration). Without an assigned series no e-invoices can be created ("Invoicing details have not been set up yet."). Permission and invoicing details are re-checked immediately before every export. Without a server connection your own details apply as before.

Practice overview

Under **More** → **Practice overview** (Pro), freelance professionals see their month at a glance: total working time, direct contact, travel and documentation (with its share of working time), kilometres driven, contacts, **billable revenue** from times and rates compared with the previous month, hours without a matching rate, open signatures, quota warnings and the cases with the most hours. Use the arrows to switch months.

Recording trips: Start trip now and Arrived

For trips to clients, the app records the route, kilometres and duration itself and creates a travel time entry from them.



A saved trip: route on the map, date, departure, arrival, duration, kilometres and case.

1. Tap **Start trip now** – in time tracking (without a case), in a case (case preselected) or in the preparation of a **today's** appointment (case and appointment preselected). The first time, the device asks for location access **while using the app**; on Android the app first explains in a note what the location is used for. If you decline, the next dialog offers **Open settings** so you can grant access later.
2. During the trip, a card on Today, in time tracking and in the case shows the **elapsed time** and the **kilometres so far**. Recording continues with the screen locked: on iPhone the blue location indicator appears in the status bar, on Android a persistent notification **Trip is being recorded**.
3. At your destination, tap **Arrived**. The review sheet shows the route on a map with departure and arrival, the date and the duration. **Departure** and **Arrival** are available as date and time fields in case the start or end was forgotten. Check and, if necessary, change the **kilometres**, choose or change the **case** (optional) and add **destination**, **purpose** and **note**. The app suggests the appointment location or the case address as destination.
4. **Save trip** creates a one-way trip with kilometres, duration and route plus a linked time entry of type **Travel time** with date, departure, arrival and minutes. Kilometres and travel time appear as usual in the monthly overview, the mileage log and billing.

Discard trip cancels a trip; the route recorded so far is deleted and no time is recorded. If the trip date lies in a closed period, the trip cannot be saved.

In the time entry, **Show trip and route** opens the saved trip with its route on the map. Deleting the time entry also deletes the linked trip including its route.

Privacy and robustness: Location is only requested between **Start trip now** and **Arrived**. The running trip is continuously saved encrypted on the device; if the system terminates the app, the trip resumes the next time the app opens (the note "Trip restored after the app restarted" appears) or the review sheet is offered. Inaccurate fixes and jumps are filtered out; kilometres are the sum of the individual legs. The route is simplified, stored compactly and encrypted with the trip and synchronised as evidence when a server is connected. The map comes from Apple Maps (iPhone, iPad) or Google Maps (Android): the map service only loads the visible map area, the route itself is drawn on the device; no address look-ups take place. If no Google map service is available on Android, the app shows a route sketch without a map service instead. If you do not want any map tiles to be loaded, turn off **Settings** → **Assistance** → **Show map for trips** (on by default); the app then always shows the route sketch drawn on the device. A recording that is still running after 12 hours ends automatically at the time of its last position and waits under **Review trip** with the note "The trip was ended automatically after 12 hours. Please check the end time." Then correct **Arrival** in the review sheet. The app never fills in times by itself: the trip can only be saved once the end lies after the start (at most seven days). This also applies to an automatically ended trip without any position fixes. **Save trip** and **Discard trip** only report success once the end has been stored durably or the recording has been deleted; otherwise the trip stays open and can be finished or discarded again. A trip restored after a restart is never saved twice. On Android, approximate location is enough for recording; the route is then less precise.

Correcting trips

Open a saved trip from its time entry with **Show trip and route**. On the **Trip** page you can change date and time of **Departure** and **Arrival**, **Kilometres**, **Case**, **Start location**, **Destination**, **Purpose** and **Note**; **Save changes** applies them. Archived cases remain available for selection.

- The linked time entry of type **Travel time** follows along: date, times and minutes match the trip. With a different case the app determines the measure and billing rate again, and with a moved date it replaces a billing rate that no longer applies.
- If departure and arrival stay unchanged, the stored times and minutes are kept exactly.
- If signed details change (date, time, duration or case), the app removes the signature and tells you so. Collect a new signature if needed.
- Conversely, the trip takes over date, times and case when you edit the travel time entry. Entry and trip are saved together or not at all.

These trips can be viewed but not changed:

- **Trips in a closed period.** The top then reads "Closed on … by …". This also applies if the change would move the trip into a closed period; the app then reports **Closed** and saves nothing – neither the trip nor the travel time entry.
- **Trips of other professionals.** The top then reads "Entry of another professional". If you edit your own travel time entry whose trip belongs to another professional, the trip stays unchanged.

Calculating travel time and distance

Store a **start address (for travel time & km)** in the settings, for example your office. In an appointment, tap **Calculate travel time & km**. The calculation uses your device's map service and only starts on your explicit action.

Export and document library

You can export documentation, reports and records in several formats – for your organisation, the youth welfare office or your own files.

1. Open the document and tap **Export**.
2. Choose an **export profile** or set the options yourself.
3. Choose the **formats**: **PDF** (finalised document), **DOCX** (editable), **XLSX** (spreadsheet), **CSV** (further processing), **JSON** (technical), a **ZIP package** or an **encrypted package (.ffexport)**.
4. Check the **privacy clean-up**: remove addresses, e-mail addresses and phone numbers, **pseudonymise names**, exclude internal notes and the professional assessment.
5. Use **Preview (PDF)** and **Edit report** to check before exporting. In the review view you can change text or make selected text unreadable with **Redact selection** – the content is replaced, not just covered.
6. Tap **Share** or **Save**.

> **Pseudonymisation is not full anonymisation.** Every export contains sensitive case data. Share it deliberately and only over secure channels.

Export profiles are created under **More** → **Export profiles**, for example a "data-minimal" profile with pseudonymisation.

Encrypted packages are opened via **More** → **Open encrypted package (.ffexport)**.

Sharing contact details

Families need a reliable way to reach you – and to know who covers for you while you are away. That is what **More** → **Share contact details** is for.

Your contact card

Tap **Edit my card**. This is what the family will receive:

- **Name**, **role**, **provider / organisation** and **department / team**
- **phone (work)**, **mobile**, **email** and **web**
- the **provider's postal address**
- **availability**: one window per weekday, a second one on demand (“second window”), plus a free **note** (for example "home visits by arrangement")
- **in an emergency, contact** – typically the provider's crisis line

- **card may be passed on**: switch it off if your card should not be shared.

Fields you leave empty are filled from the provider's central details (address, phone, web, emergency contact). If your provider maintains the cards centrally, editing is locked and a note says so.

If your card was changed elsewhere in the meantime – by your management in the admin panel, for example – **“Change not applied”** appears at the top. Your entries are not lost: **Send my version** makes your details win, **Take the other version** pulls the central version onto the device.

If your provider has blocked passing the card on, it stays visible but can no longer be shared – a note says why. An edit window opened before the block does not lift it.

Passing on a cover arrangement

If a **cover arrangement** has been recorded for you in the admin panel, it appears in the picker with name and period, for example "Cover: Kai Lorenz · 01/10/2026 – 31/10/2026". A **case delegation** you set up yourself shows up here as well. You then hand over the cover's contact details without retyping them; the accompanying text names the period and who is being covered for.

You can also pass on a colleague's card, for instance after handing a case over.

Ways to share

Way	What happens
Share	Opens the system dialog with a **contact file (vCard)**: AirDrop, messenger, mail, "add to contacts" – on iPhone and Android alike, and the family needs no app of their own.
QR code	Shows the details as a code. The family scans it with the ordinary camera app and saves the contact straight away – ideal during a visit.
Email	Opens a prepared email with an accompanying text and all details.
Message	Opens a text message with the same content.
Copy	Puts the text on the clipboard, for a messenger of your choice.

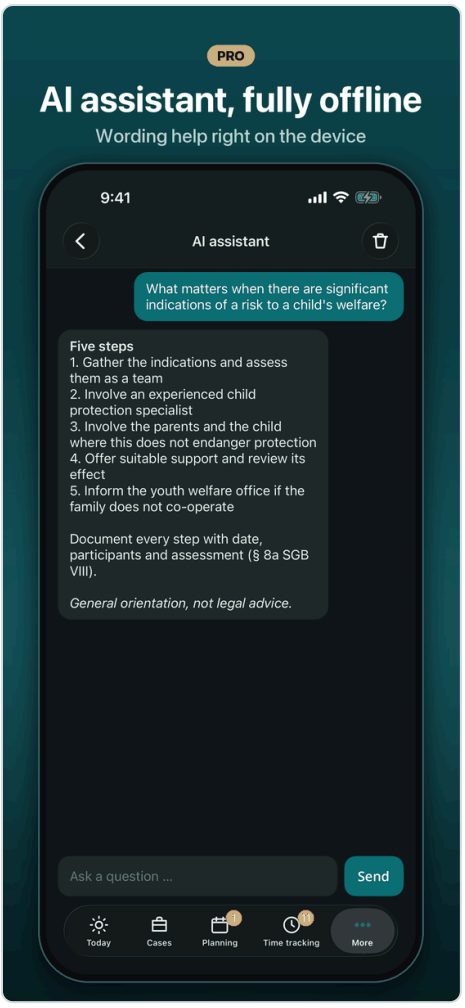
Recording the hand-over

In the **recipient** section choose a **case** and, if you like, the **participant**. With **record the hand-over in the case journal** switched on, the app files a contact entry afterwards: date, time, whose details went to whom and by which channel. For a cover arrangement the period is recorded as well.

If the person has an email address or phone number on file, it is pre-filled for **email** and **message**.

AI assistant (offline)

The AI assistant is a **Pro feature** and switched off by default. It runs **entirely on your device**: your content is never transmitted and there is no connection to a provider.



The assistant helps with wording and offers professional and legal orientation – as a suggestion, not as legal advice.

How to enable it: switch on **More** → **Settings** → **Assistance** → **Local AI support**. The first time, the app downloads the language model (a few hundred megabytes to a few gigabytes, depending on the model). After that the assistant works without internet.

What it helps with:

- wording suggestions for your documentation,
- documentation drafts from voice notes,
- professional and legal orientation for social work (German SGB VIII).

> The assistant's hints are general orientation and replace **neither** legal advice **nor** your professional judgement. Check every text you take over.

Finding a time with families

Finding a time that suits you and the family otherwise costs several phone calls. Two building blocks make it quicker.

> The scheduling assistant and contact cards are Pro features. Without a licence a window explains the feature and offers **Show purchase options**.

Calendars and commitments on the person

Open **Case** → **Participants** → **Person** → **Calendars & commitments**:

- **Read file** – an `.ics` file as Google, iCloud, Outlook or Nextcloud offer it when sharing.
- **Read link** – the address of the shared calendar (`https://…` or `webcal://…`). The app fetches it, remembers source and time, and asks how often it should **refresh itself**: every 3 days (default), daily, weekly or never. Due calendars are reloaded in the background, so you do not have to re-import by hand.
- **Record a commitment** – for appointments without you: school, therapy, working hours. With a reason, date and window, or all day.

Every import is listed with its **timestamp and number of entries**; reading the same source again replaces its entries. Recurring events are expanded into single entries on import (30 days back, a good year ahead). Deleting a calendar removes what was read from it – entries you recorded by hand stay.

Finding proposals

The search sits where you create the appointment anyway: **Planning** → **New appointment** → **Find a time**. Tick the participants, set the period, the time of day and the duration. The search lays your own calendar and the commitments of the selected people on top of each other. If the appointment already belongs to a case, the search stays in that case; when you move an existing appointment, it no longer blocks itself. Where the app has no reliable calendar data – because an import has not fully arrived on this device, or because the imported period ends – the proposal says **Unclear** instead of "everyone is free". Change participants or search values and the earlier proposals are dropped — simply search again.

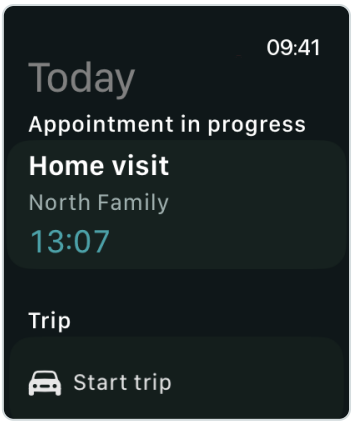
- Proposals that suit **everyone** come first.
- With "Only times that suit everyone" switched off you also see partial matches, with a note who cannot make it. For "two out of three" that is often enough.
- **Use this time** fills date and time into the new appointment; you add location, reminder and repetition as usual and save.

Apple Watch, Live Activity and shortcuts

These features are available on **iPhone and Apple Watch**.

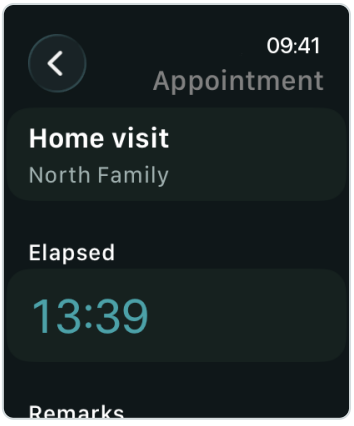
Apple Watch

On your wrist you see your day and control the running appointment without reaching for the iPhone.

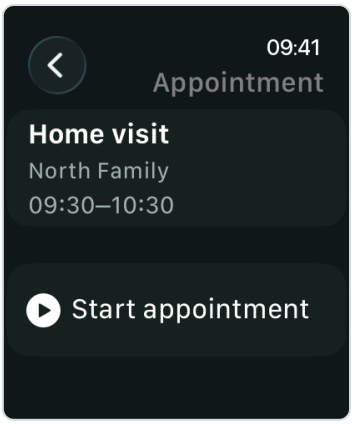


The overview on the watch: the running appointment with its timer, followed by the rest of the day.

- **Overview** – running appointment with a live timer, the next appointment, the remaining appointments of the day, open follow-ups and the counters for overdue tasks and open signatures.
- **Open an appointment** – tap one: a planned appointment offers **Start appointment**, a running one shows **Elapsed**, a field for a **note** and **End appointment**.
- **Capture a note** – dictate or scribble briefly; the text lands in the appointment on the iPhone.
- **Trip** – at the top of the overview: **Start without case** or pick a case from today's appointments or the open cases. The iPhone in the car records the route; the watch shows elapsed time and kilometres, **Arrived** ends the trip. The next time you open the iPhone app it shows the running trip or **Review trip**; the trip is only saved there. If an edit page or a dialog is open on the iPhone at that moment, the app waits until it is closed – nothing already started is lost. So that the iPhone records even while the app is closed, it asks once for location access **Always** – only after the first trip started on the watch, the next time you open the iPhone app. Without a watch trip the app never asks for **Always**. Without it, recording starts only when you open the app on the iPhone. Without any location access the trip is built from the start and arrival times, and you enter the kilometres when reviewing.
- **Overdue planning** – tap the counter: the watch lists the overdue tasks with due date and case. You still work on them in the iPhone app.
- **My card as QR** – shows your own contact card as a full-screen QR code. A tap closes it again. The family scans it with the camera and saves your details straight to the phone, no app required. If the watch is dimmed, raise your wrist briefly – then the code is bright enough.
- **Complications** – Focus Family shows the next appointment on the watch face.



The running appointment on the watch: elapsed time, note field and the button to end it.



A planned appointment can be started straight from the watch.

Without the iPhone in range: start, end and notes are **stored on the watch** and delivered automatically as soon as the iPhone is reachable again. Until then the watch shows that something is still pending. If the iPhone rejects a command – because the appointment has ended in the meantime, for example – the watch reports the reason and keeps your text until you discard it.

Live Activity and Dynamic Island

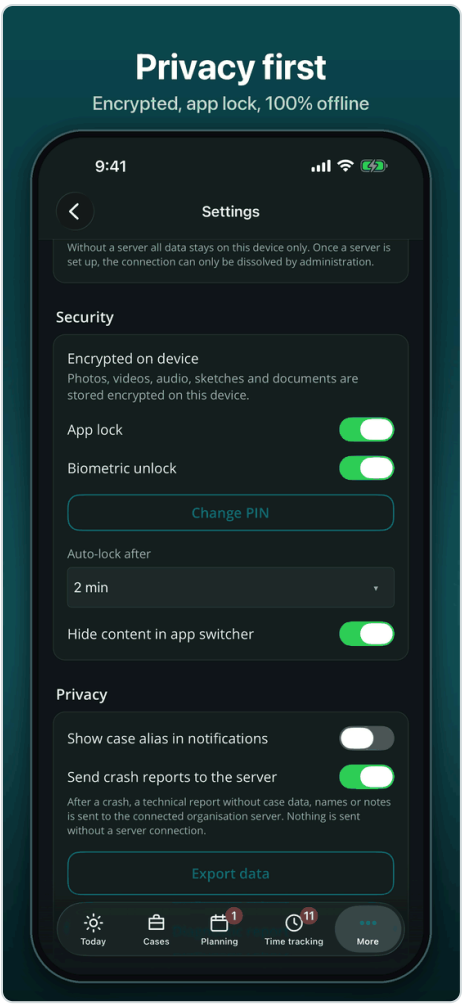
While an appointment is running, the iPhone shows it on the **lock screen** and, on devices with Dynamic Island, at the top of the screen with a live timer. A tap takes you back into the appointment. If no appointment is running but a trip is, the Live Activity and the complication show the running trip.

Shortcuts and app icon

Press and hold the app icon to jump directly to **Today**, **New time entry** or **Running appointment**.

Security and privacy

The security settings live under **More** → **Settings** → **Security**.



Encryption, app lock, automatic locking and hiding content in the app switcher in one place.

Setting	Effect
Locally encrypted	photos, videos, audio, sketches and documents are stored encrypted on the device
App lock	protection with a PIN (at least 6 digits)
Biometric unlock	unlock with Face ID, Touch ID or a fingerprint
Auto-lock after	the app locks itself after the chosen time
Hide content in app switcher	the preview is hidden in the list of open apps; on Android the setting also prevents screenshots and screen recordings
Show case alias in notifications	controls how much is visible in notifications

Screenshots on iOS and iPadOS: the system does not let apps prevent screenshots. On iPhone and iPad the setting therefore only hides the preview in the app switcher; screenshots and screen recordings remain possible.

Organisation policy: if the organisation enforces screen protection in the admin panel, the switch is turned on and locked.

The app also locks when you return from the app switcher. To unlock, enter the PIN and confirm with **Enter** or the unlock button.

On iPhone and iPad the lock page also covers dialogs that are open at that moment, such as sharing, camera, scanner or alerts; they are still there after unlocking. With the keyboard open, the lock page moves up so that the input field and **Unlock** stay reachable. If the lock page cannot be shown for once, an opaque cover reading **Focus Family is locked** hides the app; **Unlock** opens the lock page again. While the app is locked, shortcuts, setup links and opening a case automatically at its location do not open any content.

Protection against guessing

- You have **3 free attempts**. From the fourth failed attempt onwards, a **waiting period** must pass before each further attempt, growing every time (5 seconds → 10 → 20 → …, capped at about 85 minutes).
- While waiting, input is blocked and a **countdown** shows when it continues.
- The counter **survives an app restart** – restarting does not help.
- Every successful unlock resets the counter.

Forgotten your PIN?

- Use **biometric unlock** if it is set up.
- If your app is connected to an organisation server, a **server sign-in** button appears from the **3rd failed attempt**. Sign in with e-mail and password (and your authenticator code if required) or, with single sign-on, with **Sign in with** – then set a new PIN. The server sign-in deliberately offers no passkey sign-in, because it authorises the PIN reset.
- Your administration can lift the lock in the admin panel with **Reset PIN lock**; it takes effect at the next sync.
- Without a server and without biometrics there is deliberately **no back door**. Then only a previously created backup helps.

Changing the PIN always requires the old PIN or biometric confirmation.

Backup and restore

A backup protects you against mistakes, corrupted data, and loss or replacement of the device.

	Free	Professional and organisation
Number	one backup per week	unlimited
Location	on this device (inside the app)	on the device **or** any location: Files, iCloud Drive, USB stick, network drive, email …
Restore	from the list on the device or from a file	as in the free version

Backups on the device help against mistakes and corrupted data; if the device is lost, they are gone too. If you also need a copy outside the device, use **Back up and choose location** (Pro). **Delete all data** also removes the backups on the device.

Create a backup:

1. **More** → **Backup**.
2. Set a **password** and repeat it. The file (**.ffbackup**) is encrypted with it.
3. Store the file in a safe place specified by your organisation.

Restore a backup:

1. Choose **Restore backup** and open the **.ffbackup** file.
2. Enter the password and confirm. Restoring **replaces** all current data.

> Without the password a backup **cannot** be opened, and without a backup **no** restore is possible. Keep both carefully and back up regularly.

Changing devices: Focus Family data is excluded from iCloud and computer backups and from the data transfer when a new device is set up. On a new device the app therefore starts with setup. Bring your data over with a backup that you create on the previous device first. If the app is connected to a server, it syncs the data once it is connected again.

If data still reaches a device without its security key, for example from an older iCloud backup, the app cannot decrypt it. It then shows **Data cannot be read**. **Set up again** deletes the unreadable data and starts setup. Backups on the device are protected by their own password and are kept. You can save them first with **Export backups** and restore them after setup under **More** → **Backup**. The data on the previous device stays unchanged.

If the security key is only temporarily inaccessible, for example after a restart before the first unlock, the app shows **Data still locked** and opens the data after unlocking. **Try again** checks again immediately. The app never creates a new key over existing data.

Server and team

This chapter only applies if your organisation runs its own server. Without a connection everything stays local on your device – and the app is fully usable.

Connecting the app

1. **Settings** → **Server / synchronisation** → **Connect server**.
2. **Scan QR code** and scan the code from your organisation – or type the **server address**.
3. Check the organisation shown and tap **Connect** or **Sign in**. Connections always use HTTPS.
4. If **waiting for approval** appears, your administration still has to release the device. **Check status** queries the current state.

Device details: With every request to the server the app sends its version and the device model (for example "iPhone 16 Pro"), plus a device name you assigned yourself if it says more than the generic device type. The administration sees these details in the device list of the admin panel. They contain no case data.

Setup link and QR code from the administration: A setup link or setup QR code only connects the app after two confirmations: **Confirm server connection** names the server address (**Check server** only queries the server, no case data is transferred), then **Connect to this organization?** shows server, organisation and

instance ID; only **Connect** signs in. If the app is locked, it processes the link only after unlocking. Only continue if the link or code comes from your own organisation.

Two-factor (MFA): If your organisation requires two-factor sign-in, you are additionally asked for a **6-digit code** from your authenticator app – during setup and at every sign-in. MFA itself is set up by your organisation in the admin panel.

Passkey: If the account uses passkey sign-in, **Sign in with passkey** continues the sign-in in the browser, where it is confirmed with fingerprint, face or security key. The button is available when connecting and when signing in again after a session has expired: **More** then shows **Sign in**, and the sign-in page offers **Sign in with passkey** alongside e-mail and password.

Signing in with the organisation account (SSO): If your organisation uses single sign-on, an additional button **Sign in with** (or **Sign in with organization account**) appears below the password sign-in. It opens the browser and leads straight to your organisation's sign-in page – enter your organisation credentials there, not in the app. The same button appears when **signing in again** and in the **server sign-in** on the lock screen. If you enter an organisation e-mail address with a password in the app, the app also switches to the browser sign-in. The button appears only while your organisation has SSO switched on; the app checks this each time the sign-in view opens.

If your organisation has additionally **enforced** SSO, the app no longer shows e-mail and password fields or the passkey button in these views – only the highlighted button **Sign in with** and the hint "Sign-in uses the organization account." PIN and biometric unlock are unchanged. When setting up via QR code or setup link, the app opens the organisation sign-in in the browser right after you confirm the server.

Syncing and sharing

- **Sync now** brings shared cases up to date immediately; in the background this happens automatically.
- **Share** adds colleagues to a case. Without sharing, only you see it.
- **Cover:** the sharing screen also lets you set up a time-limited cover arrangement – choose the person, set **from** and **to**. Access starts and ends automatically (holiday cover can be planned in advance) and can be ended at any time. Permanent assignments are unaffected.
- **Private entries are never shared.**

In the list of practitioners with access, the person responsible for the case is marked **responsible**.

Transferring a case

When responsibility changes permanently, hand the case over completely to a colleague. Only the **responsible** practitioner can do this.

1. Open the case and tap **Share**.
2. In the **Transfer case** section, pick the colleague under **Transfer to**.
3. Decide on **Keep access**: switched on, you remain involved in the case. Switched off, the case is **removed from your device** with all its content after the transfer.
4. Tap **Transfer case** and confirm with **Transfer**.

The new practitioner is then responsible and takes over the case with every entry, including private ones. **Time entries and signatures** stay with the person who recorded them. Transferring is **only possible with a**

server connection. Before the transfer the app fully synchronises the case. If that sync fails or unsynchronised changes, open conflicts or files not yet uploaded remain, nothing is transferred and the app first asks you to sync so that nothing is lost. Private cases can only be transferred without **Keep access**.

Conflicts

If two people changed the same thing, the app shows the **conflict**. You choose **keep mine** or **take the server version**. For time entries in a closed period there is no server version – there you choose between **keep local** and **discard**.

Disconnecting

You **cannot** disconnect from a server yourself. Only your administration can do that in the admin panel (remove device).

> **Good to know:** sketches, voice memos and media you create **without a case** via the **More** tab sync as **personal entries** – for you only. Everything created **inside a case** is available to the team.

Licence and subscription

Basic case documentation is free and stays free. The **Professional subscription** (monthly or yearly) unlocks the features that save the most time in everyday work. If your organisation uses an **organisation licence**, all Pro features are included – your device receives its seat from the administration.

Free	Additionally with Professional / organisation
Cases, participants, addresses, goals, agreements, roadmap	**Report assistant** for development reports
Planning with appointments, series, tasks, cover	**Offline AI assistant**, **structure dictations** and **AI for case import** (with your own instruction)
Progress notes, dictation with transcript, photos, video, sketches	**E-invoice (XRechnung, ZUGFeRD)** and **practice overview**
Signatures, case file, document import and scanning with text recognition	**Genogram and eco-map**, **easy-read language**, **case vignette**
Child protection (§ 8a) with follow-up tasks, **case cover sheet**, **new case from cover sheet**	**Text snippets**, **PDF forms**, **period reports**, **advanced export**
Time tracking, signature of those concerned	**Rate agreements**, record and time exports, invoice drafts
Deadline radar in "Today" and in the case	**Deadline reminders** by notification
One backup per week on the device	**Unlimited backups**, any location
Apple Watch, Live Activity, shortcuts	**Contact cards**, **scheduling with clients**

Pro features carry a golden **PRO** badge in the app. If you tap such a feature without a subscription, a window explains what it does – with **Show purchase options** or **Close**. The subscription renews

automatically and can be cancelled at any time in your App Store or Google Play account settings (**More → Licence → Manage subscription**).

Why the app occasionally asks for an online check: paid licences must be confirmed online from time to time. This happens automatically in the background. If the check is missing for a long time, the app reminds you in stages:

From day	What happens
3	a friendly note at most once a day
5	an hourly reminder
10	the app requires the check and is locked until it succeeds

Besides **Validate now**, the lock screen offers further options: **Create backup** makes an encrypted backup (password of at least 12 characters), saves it on the device and offers to store it in another place – regardless of the weekly limit of the free version. **Buy or restore** opens the licence page to subscribe or restore a purchase (on a device connected to a server only if the organisation allows personal Pro licences). **Remove license and continue with the free version** keeps the app running as the free version; all data is kept and an existing subscription is not cancelled. As soon as the licence can be confirmed online again, the Pro features return automatically.

Your data always stays untouched. Simply connect the device to the internet briefly every few days and you will never see a reminder. The free version is exempt.

Help & contact

Under **More → Help & contact** you send a request directly to the Focus Family team at Software Notion: **Bug report**, **Feature request**, **General contact** or **Security report**.

- **No app data is transmitted.** Cases, appointments, tasks, documents, notes and contacts stay on the device. Please therefore describe as precisely as possible what happened, on which screen and how it can be reproduced.
- **Check before sending: Check and show preview** checks the text for names stored in the app and removes phone numbers, e-mail addresses and similar details. If the text contains a name from the app, it is not sent.
- **Preview:** You then see exactly what will be sent – the technical details (reference, app version, platform, licence type, Focus Family ID and, when connected to a server, the server version) plus the subject and the text. You can still correct both; they are checked again when you tap **Send**.
- **Replies:** An e-mail address for replies is required.
- **Without internet** the request can be copied or sent with the e-mail app.

The link **Which data is transmitted and when it is deleted** explains exactly which data is transmitted and when it is deleted. When connected to a server, your organisation can hide this area through a policy.

Settings at a glance

You reach the settings through **More** → **Settings**.

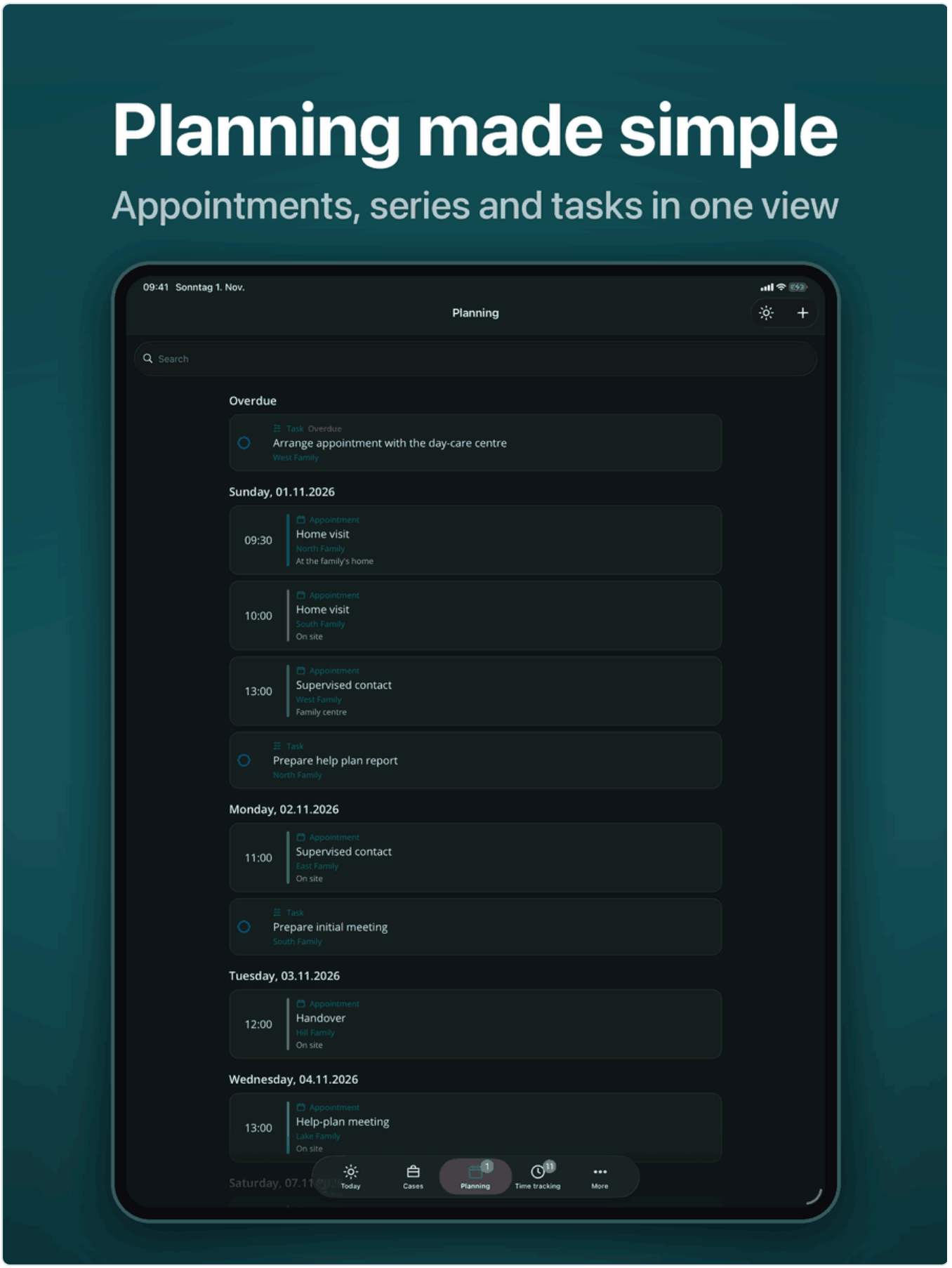
Area	Content
General	practitioner name, appearance (system, light, dark)
Organisation	name, address and contact – appears as the letterhead in exports; **invoice issuer for e-invoices** (Pro)
Server / synchronisation	connection, sync now, two-factor, sign in again
Security	encryption, app lock, biometrics, auto-lock, hide content in app switcher
Privacy	case alias in notifications, send crash reports to the server (on by default, no case data), export data, diagnostics report
Working time	start address for travel time and distance, **deadline reminders** (Pro), **birthday reminders**
Calendar	sync with the device calendar (neutral or with case details), import appointments
Assistance	local AI support, AI model, keep screen awake, **Open case at current location automatically** (off by default), **Show map for trips** (on by default)
Media	defaults for image and video editing
About	version, load sample data, **delete all data**, links to privacy policy, imprint and contact

Your organisation can set some values centrally. Such fields are locked in the app and carry a note.

---

iPad and large screens

On iPad and large Android tablets the app uses the extra width: lists and details sit side by side, forms use several columns, and content stays comfortably centred.



The same planning view on iPad – more appointments at a glance, identical operation.

Everything else works exactly as on the phone. With an attached keyboard you confirm entries with **Enter**.

Frequently asked questions

Do I need a server? No. The server is optional. Without a connection you work entirely locally. You only need a server if your organisation wants to share cases in a team.

My photos do not appear on the second device. Tap **Sync now** and check that both devices are connected and approved. Private entries (lock symbol) never appear in the team.

A time entry shows a lock and cannot be changed. The period was closed by your management. You can still read it. For a correction, ask management to reopen the period.

Does the family have to sign? No. The signature is voluntary. Without it the entry is marked "not signed" – record and billing still work.

The app shows a countdown and I cannot enter my PIN. After several failed attempts the app protects itself with a growing waiting period. Wait for the countdown or use biometrics or the server sign-in.

Why am I asked for a 6-digit code? Your organisation enabled two-factor sign-in. The code is in your authenticator app.

Why does the app icon show a number? It is the sum of the red numbers on the tabs: overdue tasks and appointments, open signatures and synchronisation problems. On Android it only appears together with the silent "items need attention in Focus Family" notification and only if the app may send notifications.

A case has disappeared from my device. If it was transferred to a colleague and you did not keep access, the app removes it from the device. Your time entries and signatures remain assigned to you.

How do I disconnect from the server? Only your administration can do that in the admin panel.

On the new device the app starts with setup. Focus Family data is deliberately not transferred when changing devices. Create a backup on the previous device under **More** → **Backup** and restore it on the new device. With a server connection the data arrives by synchronisation after connecting again (see "Backup and restore").

A page does not open or the app behaves unexpectedly. More → **Diagnostic report** shares a technical report for your administration or support. It contains the app version, platform, device category and a log of the most recent page changes, but no case data, names, addresses or notes. If a page change hangs for more than 10 seconds, the app also creates a crash report.

Is my data safe? Case data is stored encrypted on the device. There is no mandatory account, no cloud and no tracking. App lock, hiding content in the app switcher (on Android also against screenshots) and password-protected backups add to that.

Small glossary

Term	Meaning
Alias	pseudonymous name of a case so no real name is visible in everyday use
Address	group of participants who live at the same place; basis for the frames in the genogram
Case cover sheet	tabular front sheet of a case with young people, parents and other participants
Quota	the approved hours of a support case, related to a period
Contact type	whether an activity was direct client contact or indirect work
Activity record	list of your times per case or practitioner, the basis for billing and the youth welfare office
Countersignature	signature of those concerned confirming a service
Case file	collection of all documents of a case
Checksum	technical fingerprint of a file; proves that nothing was changed
Sync	alignment with your organisation's server so the team shares one state
Cover	time-limited access to a case, for example during holidays
Local-first	the principle that data lives first and completely on your device

---

Focus Family · App Handbook (iOS/Android) · Version 1.4.0 · November 2026