

Automatic Creation of Schedules Job Aid

The **Automatic Creation of Schedules** function is used to link EVV held on the **Call Maintenance** page to visits missing one or both confirmations. This feature allows Agencies to correct visits to include missing details in the system. An Agency must coordinate with the Caregiver to obtain any missing visit information (such as the confirmed Clock-In and/or Clock-Out times) to properly record in the system.

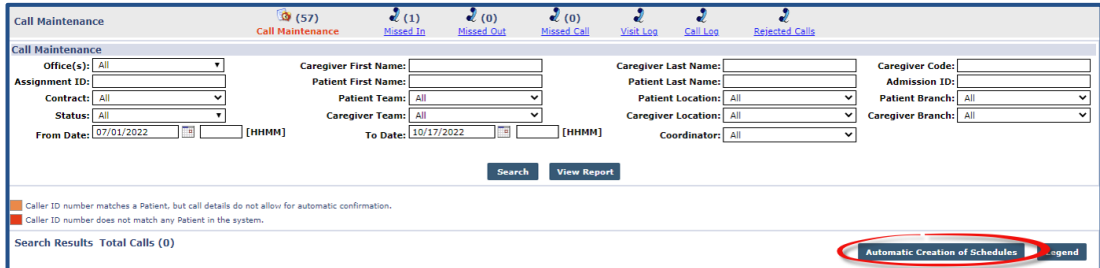
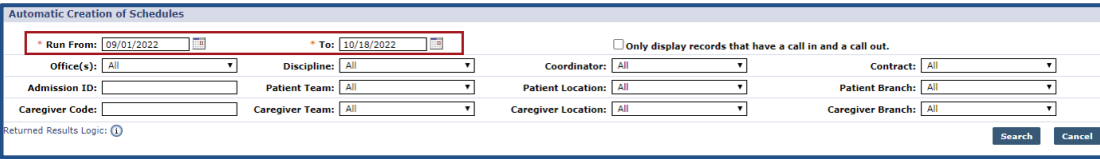
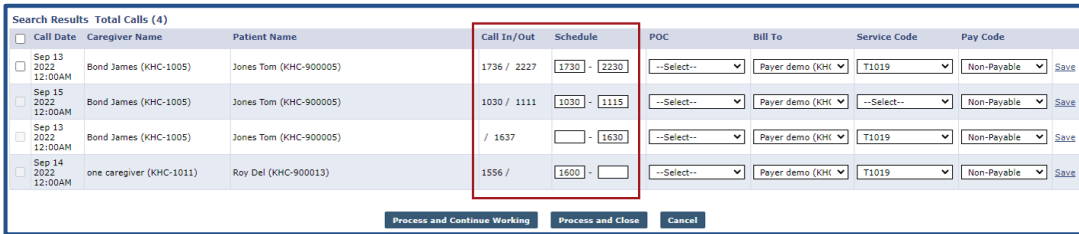
Consider the following factors when using this feature:

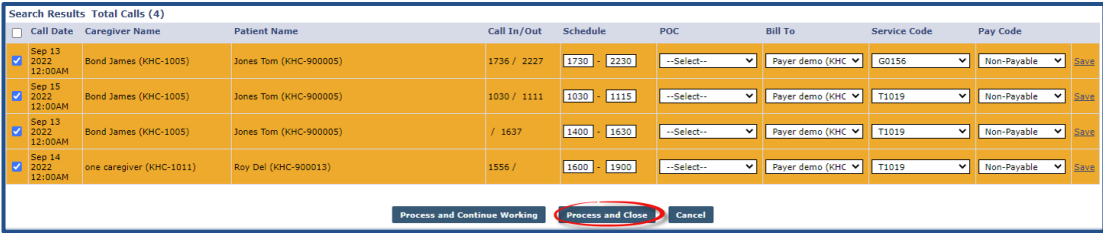
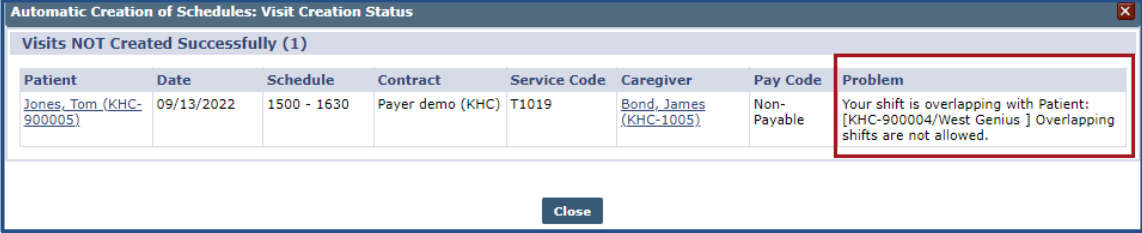
- Each Caregiver must be assigned to a Patient via the Patient Profile (**Patient > General**) to be able to perform EVV for unscheduled visits via the Mobile App.
Refer to the [Assigning Caregivers to a Patient Profile](#) section for further details.
- To prevent billing issues, it is recommended for Agencies to review the Call Maintenance page on a **weekly basis** to ensure all visits are correct and completed.

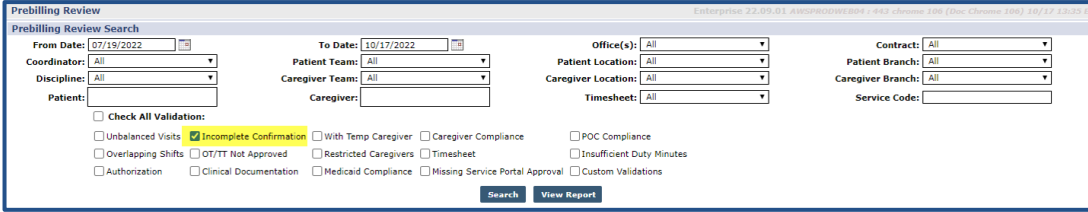


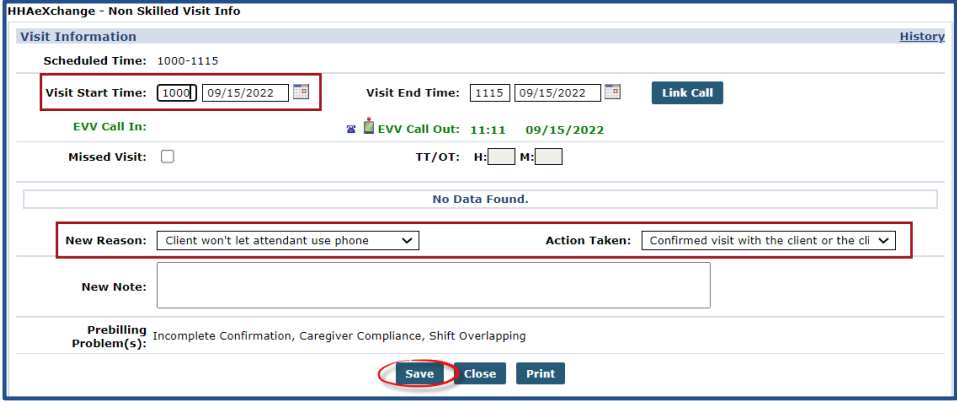
Situations where visits may end up on Call Maintenance include:

- When Call In or Call Out is missing,
- When the appropriate **Service Code** is not selected, in cases of multiple contracts/authorizations, and
- If a visit is confirmed via IVR, and the Patient has multiple contracts/authorizations, then the Service Code must be manually selected on the visit in the Automatic Creation of Schedules feature. A **Service Code** cannot be selected by a Caregiver using IVR.

Complete the following steps when using the Automatic Creation of Schedules method to confirm visits.

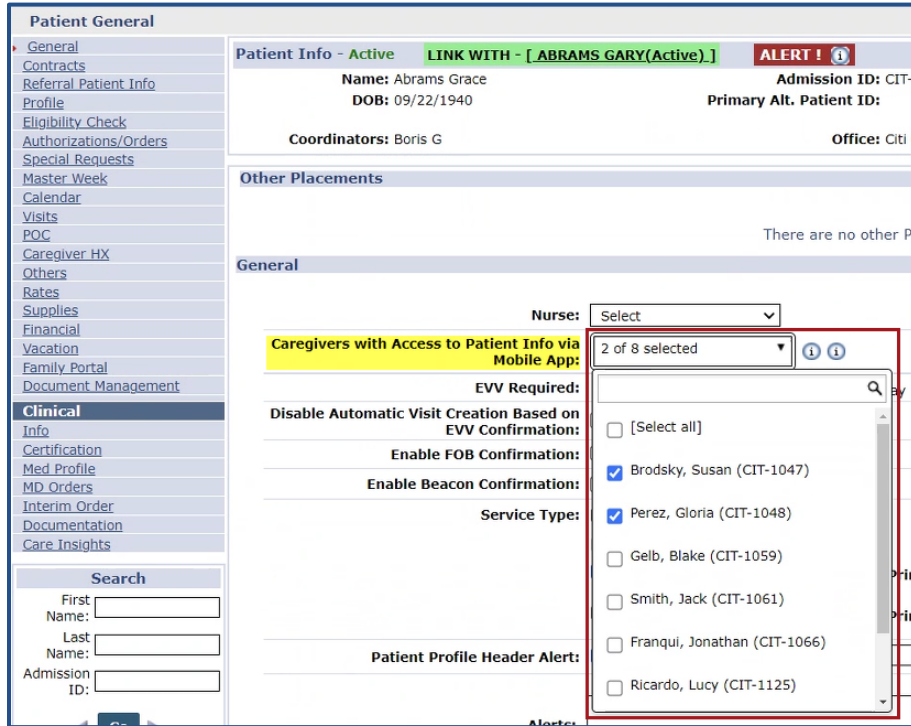
Step	Action
1	Navigate to Visit > Call Dashboard and select Call Maintenance .
2	<p>Click on the Automatic Creation of Schedules button (as pictured in the image below).</p>  <p style="text-align: center;">Automatic Creation of Schedules</p>
3	<p>On the Automatic Creation of Schedules page, specify a date range using the Run From / To (required) fields and other available filters to narrow the search. Click Search.</p>  <p style="text-align: center;">Automatic Creation of Schedules Page</p>
4	<p>The search returns EVV made within the specified date range (and any values entered in the available filter fields). The values under the Call In / Out column represent the actual time the EVV was placed. The system rounds the time displayed in the Call In / Out fields according to the Payer setup (in 15-minute increments) to create a Schedule time. The system automatically attempts to pair two EVV.</p>  <p style="text-align: center;">Search Results</p>

Step	Action
5	<p>To generate visits using the EVV information, enter details in the following columns:</p> <ul style="list-style-type: none"> Schedule: The system completes these fields by rounding the Call In and/or Call Out time of the EVV(s) as configured by the Payer (in 15-minute intervals). Service Code: This field is required to create a scheduled visit. Caregivers can select the required Service Code from the Mobile App. Providers can verify and confirm that the correct Service Code is selected to prevent billing issues. <p><i>Note: Caregivers cannot select a Service Code when multiple contracts/Service Codes exist for a visit confirmed via IVR. These visits show up in the Call Dashboard where Providers must select the applicable Service Code.</i></p> <ul style="list-style-type: none"> Pay Code: Configured and set to <i>Non-Payable</i>.
6	<p>When values for these fields are entered, the system highlights the EVV in orange to indicate that edits have been applied to a row. If all visit information is already populated, then select the checkbox in the left-most column.</p>  <p style="text-align: center;">EVV Ready to Process into Visits</p> <p><i>Note: Unhighlighted rows can also be selected to include in the visit creation process.</i></p>
7	<p>When all the required information has been entered, click the Process and Close button to process the selected EVV and generate visits.</p>
8	<p>When the system completes the process the <i>Automatic Creation of Schedules: Visit Creation Status</i> window opens, detailing which visits were successfully generated and which were not. Visits that could not be created contain a Problem column, detailing why the system failed to create a visit. Click Close to exit.</p>  <p style="text-align: center;">Visit Creation Status Window</p>
9	<p>Navigate to Billing > Prebilling.</p>

Step	Action
10	<p>Search for visits held in Prebilling due to an <i>Incomplete Confirmation</i> validation.</p>  <p style="text-align: center;">Search by Incomplete Confirmation Validation</p>
11	<p>In the search results, locate the visits generated by the Automatic Creation of Schedules function that are missing a confirmation and click the edit  icon to open the visit window.</p>  <p style="text-align: center;">Visits with Missing (Incomplete) Confirmation</p>
12	<p>Select the <i>Visit Info</i> tab and enter either the Visit Start Time or Visit End Time, as well as values for the New Reason and Action Taken fields (if required). Click Save to finalize. The visit can now be invoiced.</p>  <p style="text-align: center;">Complete Visit Confirmation</p>

Assigning Caregivers to a Patient Profile

Caregivers must be registered in the Mobile App and set up in the system prior to Patient assignment. Caregivers must be assigned to each Patient on the *Patient General* page (**Patient > General**). Click on **Edit** to open fields. From the **Caregivers with Access to the Patient Info via Mobile App** dropdown field, select only the Caregivers who need access to the Patient. Once saved, assigned Caregivers can perform visits (*Scheduled* and *Unscheduled*) via the Mobile App.



Patient General: Caregiver with Access to Patient Info Setting

Caregivers must contact the Agency in cases where an EVV via the Mobile App cannot be completed to verify if this setting is enabled.