

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 <u>weekly basis</u> 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	Click on the Automatic Creation of Schedules button (as pictured in the image below).							
3	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. Automatic Creation of Schedules *Run From: @/0//2022 *** ***************************							
4	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.							



Step	Action								
	To generate visits using the EVV information, enter details in the following columns:								
	• 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).								
5									
	• 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.								
	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.								
	Pay Code: Configured and set to Non-Payable.								
	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.								
	Search Results Total Calls (4)								
6	Call Date Call Date Call Lin/Out Schedule POC Bill To Service Code Pay Code \$ 59,13 \$ 50,22 \$ 2020M Bond James (OHC-1005) Jones Tom (OHC-900005) 173.6 / 2227 173.9 - 2230 Select ▼ Payer demo (OHC ♥) G015.6 ♥ Mon-Payable ♥ Same								
6	Sep 15 2022 2024 Bond James (KHC-1005) Jones Tom (KHC-900005) 1030 / 1111 1030 - 1115 Select Payer demo (KHC T1019 Non-Payable Saut								
	Sep 13 12:004M Bond James (KHC-1005) Jones Tom (KHC-900005) / 1637 1400 - 1630 Select Payer demo (KHC v T1019 v Non-Payable v Saxe Sep 14 v 2022 one caregiver (KHC-1011) Roy Del (KHC-900013) 1556 / 1600 - 1900 v Select v Payer demo (KHC v T1019 v Non-Payable v Saxe								
	22:00AH Process and Continue Working Process and Close Cancel								
	EVV Ready to Process into Visits								
	Note: Unhighlighted rows can also be selected to include in the visit creation process.								
	When all the required information has been entered, click the Process and Close button to								
7	process the selected EVV and generate visits.								
	When the system completes the process the Automatic Creation of Schedules: Visit Creation								
	<i>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 <i>Close</i> to exit.								
8	Automatic Creation of Schedules: Visit Creation Status Visits NOT Created Successfully (1)								
	Patient Date Schedule Contract Service Code Caregiver Pay Code Problem								
	Jones_Tom (KHC- 900005) 09/13/2022 1500 - 1630 Payer demo (KHC) T1019 Bond, James (KHC-1005) Non- Payable Your shift is overlapping with Patient: [KHC-900004/West Genius] Overlapping shifts are not allowed.								
	Close								
	Visit Creation Status Window								
9	Navigate to Billing > Prebilling .								



Step	Action
	Search for visits held in Prebilling due to an Incomplete Confirmation validation.
10	Prebilling Review Extremption 22.09.01 Austration 2000 100/12 12.02.01 Prebilling Review Search
	In the search results, locate the visits generated by the Automatic Creation of Schedules function that are missing a confirmation and click the edit "
11	Check All Validation: Urbalanced Vists © Incomplete Cenfirmation With Temp Caregiver Compliance POC Compliance Overlapping Shris OUTH Not Approved Restricted Caregivers Timesheet Insufficient Daty Minutes Authorization Clinical Documentation Medicaid Compliance Missing Service Portal Approval Custom Validations Search View Report Total Search Result: 3 Total Hourly: (02:45) Total Visit: (00:00) Total Daily: (00:00) Extremb
	Search Results Date Office Contract Garceiver Carceiver Societ Coordinators Scheduled Visit Time Discibiline TI Problem 09/14/2022 Hits-S00004 Wisit Genius PE Hone and Healthcare Payer demo (HHC) Hits-1002 Lee John T1019 Default 1300-1440 PCA Carceiver Compliance Carceiver Compliance
	Visits with Missing (Incomplete) Confirmation
	Select the Visit Info 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.
	HHAeXchange - Non Skilled Visit Info
	Visit Information History Scheduled Time: 1000-1115
	Visit Start Time: 1000 09/15/2022 Image: 1115 09/15/2022 Image: 1115 Link Call
12	EVV Call In: 22 EVV Call Out: 11:11 09/15/2022 Missed Visit: TT/OT: H: M:
	No Data Found.
	New Reason: Client won't let attendant use phone Action Taken: Confirmed visit with the client or the cli
	New Note:
	Prebiling Problem(s): Incomplete Confirmation, Caregiver Compliance, Shift Overlapping
	Close Print
	Complete Visit Confirmation



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.

General	Patient Info - Active	LINK WITH - [ABRAM	CARV(Active) 1	ALERT ! 🚺	
Contracts			IS GART(ACTIVE)		
Referral Patient Info	Name: Abrams Grace			Admission ID: CIT-2	
Profile	DOB: 09	DOB: 09/22/1940		Primary Alt. Patient ID:	
Eligibility Check					
Authorizations/Orders	Coordinators: Bo	Coordinators: Boris G			e: Citi C
Special Requests					
Master Week	Other Placements				
Calendar					
Visits					
POC				There are no o	other Pa
Caregiver HX	General				
Others	General				
Rates					
Supplies		Nurse:	Select	~	
Financial			6		_
Vacation	Caregivers with Ac	cess to Patient Info via	2 of 8 selected	• i i	
Family Portal		Mobile App:	L		
Document Management		EVV Required:			9
Clinical	Disable Automatic	Visit Creation Based on			
Info		EVV Confirmation:	[Select all]		
Certification	En	able FOB Confirmation:	_		
Med Profile			🔽 Brodsky, Susan	(CIT-1047)	
MD Orders	Enabl	e Beacon Confirmation:			
Interim Order		Service Type:	Perez, Gloria (C	IT-1048)	
Documentation		Service Type:		,	
Care Insights				1050)	
			Gelb, Blake (CI	-1059)	Prin
Search					Prin
First	1		Smith, Jack (CI	F-1061)	
Name:	J				Prin
Last			🗌 Franqui, Jonath	an (CIT-1066)	
Name:	Patie	nt Profile Header Alert:	<u> </u>		
Admission	<u>ا</u> ۲		Ricardo, Lucy (TT-1125)	
ID:	J			.11-11201	

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.