

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								
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:								
5	• 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.								
	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) Call Jate Caregiver Name Patient Name Call In/Out Schedule PDC Bill To Service Code Pay Code								
6	See 13 Source Source Formation Formation<								
	Ø 2022 Exp (2004M Bond James (HHC-1005) Jones Tom (HHC-900005) 1000 / 1111 1000 P 1115 -Select- V Payer demo (HHC V T1019 Non-Payable Xext Ø 502 AM Ø 202 AM Bond James (HHC-1005) Jones Tom (HHC-900005) / 1537 1400 1530 Select- V Payer demo (HHC V T1019 Non-Payable Xext								
	Sep 14 12:00AH one caregiver (KHC-1011) Roy Del (KHC-900013) 1556 / 1500 / 1900 Select Payer demo (KHC T1019 Non-Payable Same								
	Process and Continue Working Process and Good Cancel								
	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	_							
	Status 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.								
	Automatic Creation of Schedules: Visit Creation Status								
ð	Visits NOT Created Successfully (1)								
	Patient Date Schedule Contract Service Code Caregiver Pay Code Problem Jones, Tom (KHC- 90/03C) 09/13/2022 1500 - 1630 Payer demo (KHC) T1019 Bond, James (KHC, 1005) Non- Your shift is overlapping with Patient: (KHC, 20004/Meet Genue 1 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 <i>Incomplete Confirmation</i> validation.								
10	Prebilling Review Enterprise 22.09.01 Alt20400/W1894 (402 downes 100 (flor: 00/ms 10/17/12/204 Prebilling Review Search From Date: [07/17/2022] Office(s): [All • • Contract: [All • • Patient Team: [All • • Patient Location: [All • • Patient Location: [All • • Patient Location: [All • • Patient Earnch: [All • • Patient Earnch: [All • • Caregiver Location: [All • • Caregiver Compliance [All • • Caregiver Compliance] Doublanced Visits [Complete Confirmation With Temp Caregiver] Caregiver Compliance Doubling Environ Doubling Service Potal Approved Restricted Caregivers] Teached: Location Validations Search • Varier Report Caregiver Location = Caregiver Compliance Discupient [Doubling Environ Doubling Service Potal Approved Location Validations Search • Varier Report							
	Search by incomplete Confirmation Validation							
	that are missing a confirmation and click the edit "C" icon to open the visit window.							
11	Check All Validation: Unbalanced Visits Incomplete Confirmation With Temp Caregiver Compliance Overlapping Shifts OT/TT Not Approved Restricted Caregivers Immethent Authorization Clinical Documentation Missing Service Portal Approval Custom Validations Search View Report Total Search Result: 3 Total Hourty: (02:45) Total Visit: (00:00) Total Daily: (00:00) Refresh							
	Search Results DateAdmissionID Patient Name Office Contract Carceiver Name Service Coordinators Scheduled Visit Time Discipline IF Problem 09/14/2022 ktic-500004 West Genus PE Home and Healthcare Payer demo (Hrk) ktic-1002 Lea.John T019 Default 1300-1400 PCA Caregiver Compliance of Kic 09/14/2022 ktic-500004 West Genus PE Home and Healthcare Payer demo (Hrk) ktic-1002 Lea.John T019 Default 1200-1300 PCA Encomplete Confirmation d' Kic 09/14/2022 ktic-500004 West Genus Per one and Healthcare Payer demo (Hrk) ktic-1002 Todd Jason T019 Default 1245- PCA Encomplete Confirmation d' Kic 09/14/2022 ktic-500004 Per one and Healthcare Payer demo (Hrk) ktic-1002 Bond James T1019 Default 1445- PCA Encomplete Confirmation d' Kic 09/14/2022 ktic-500004 Per one and Healthcare Payer demo (Hrk) Ktic-1002 Bond Jamas T1019 Def							
_	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.							
12	HHAeXchange - Non Skilled Visit Info History Visit Information History Scheduled Time: 1000-1115 Visit Start Time: 1000 09/15/2022 III Visit End Time: EVV Call In: 22 III EVV Call Out: 11:11 09/15/2022 Missed Visit: TT/OT: Ht. No Data Found. No Data Found. New Reason: Client won't let attendant use phone Action Taken: Confirmed visit with the client or the clien							
	New Note:							
	Problem(s): Incomplete Confirmation, Caregiver Compliance, Shift Overlapping							
	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	I TNK WITH - [ABRAM	IS GARY(Active)]	ALERT I	
Contracts	Name: A	rams Grace	15 GART(ACTIC)]	Admission T	D: CIT-2
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Family Portal)	
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Info		EVV Confirmation:	Select all]		
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Med Profile			🛛 🔽 Brodsky, Susan	(CIT-1047)	
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Documentation		Service Type:		11 1040)	
Care Insights			- 0.11. 01-1 (07		
			Gelb, Blake (CI	1-1059)	
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First			🗌 Smith, Jack (CI	T-1061)	
Name:			_		Prin
Last	¬		🗆 Frangui, Jonath	an (CIT-1066)	
Name:	Patie	nt Profile Header Alert:			
Admission			Dicardo Lucy (TT-112E)	
ID:			Kicardo, Lucy (211-1123)	

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.