

Caregiver Search and Communications Process Guide

Provider User Guide

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Caregiver Search and Communications

Overview

DISCLAIMER

This feature is activated by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

To better streamline Caregiver searches, all related modules including the *Availability Search* and *Case Broadcast*, have been consolidated into a single process flow. Search criteria is expanded, providing various views (grid, map, schedule) to display results in all communication options (Mobile message, text, email, and broadcast). This category covers the functionality incorporated into the Caregiver Search, Availability, and Communications modules. In alignment with the Caregiver Search options, Providers can also communicate with Caregivers from generated searches.

Navigate to ***Caregiver > Search Caregiver (New)*** to access the *Caregiver Search* pages. Providers can generate searches for **Caregivers**, a **General Caregiver Availability** search, or search to **Fill a Shift**. Refer to those specific sections in this topic to learn more about each option.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Client Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The **Patient** is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The **Caregiver** is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or Health and Human Services (HHS). The **Payer** is the organization that manages patient Medicaid benefits and claims payments.
HHAX	Abbreviation for HHAeXchange.
UPR	Acronym for Universal Patient Record (Linked Contract Patient)

HHAX Texas Terms and Definitions

The following table lists terms used in the HHAeXchange system and cross references them to terms and definitions used in EVV policy in Texas.

**Terms marked with an asterisk can be configured in the HHAX system.*

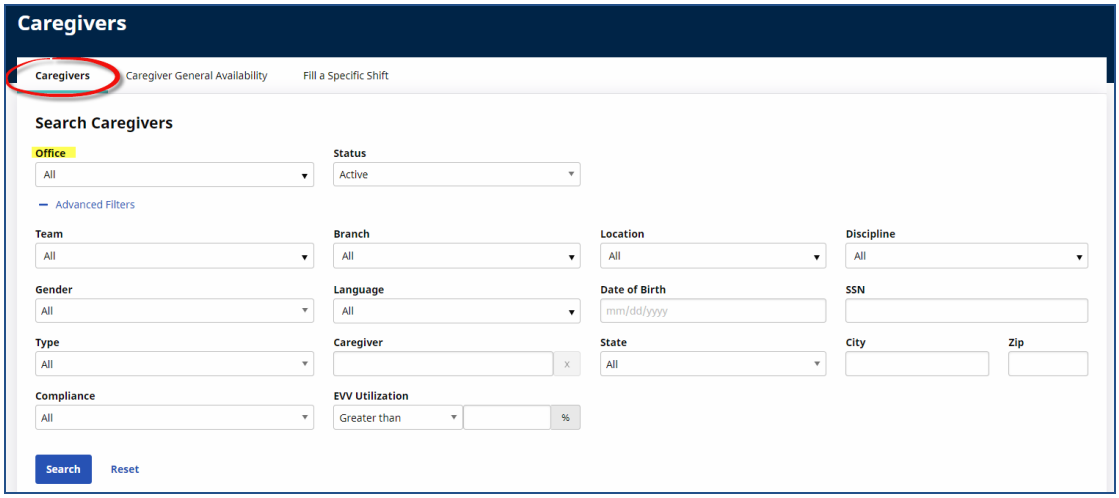
HHAX Term	Texas Term	Definition
Billable Hours (Adjusted Hours)	Bill Hours	The EVV system calculates Bill Hours by subtracting the Bill Time In from Bill Time Out and rounding to the nearest quarter hour increment. Bill Hours represents the hours to be billed
*Caregiver	Service Provider or Consumer Directed Services (CDS) Employee	Service Provider: Person who provides an EVV service to a Member and is employed by or contracted with a Program Provider. CDS Employee: Person who provides an EVV service to a Member and is employed by a CDS Employer.
Confirmed Visit	EVV Visit Transaction	Record generated by an EVV system that contains data elements for an EVV visit. Data elements include service authorization data, member data, service provider data, program provider or FMSA data, and EVV service delivery data.
--	Consumer Directed Services (CDS) Employer	Member or legally authorized representative (LAR) who chooses to participate in the CDS option and is responsible for hiring and retaining a service provider to deliver a Medicaid service.
Duty	Task	Activities of Daily Living that can be recorded as having been performed or refused during a visit.
EVV Call In	EVV Clock In	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the beginning of a service delivery visit.
EVV Call Out	EVV Clock Out	Time captured by the EVV system from the electronic verification method (home phone landline, alternative methods/devices, mobile method) that the service provider used to indicate the end of a service delivery visit.
Fixed Object (FOB)	Alternative Device	An HHSC-approved electronic device that allows a service provider or CDS employee to clock in and clock out of the EVV system from the member's home.
HHAX	HHAeXchange	Acronym for HHAeXchange.
Manual Visit Confirmation	Manually Entered Visit	A visit transaction manually entered into the EVV system when the service provider or CDS employee fails to clock in

HHAX Term	Texas Term	Definition
		or out of the EVV system or an HHSC-approved clock in or clock out method is not available.
Mobile Verification	Mobile Method	Clocking in and out of the EVV system in the home or community using an HHAX-provided application on a smart phone or other mobile device with Internet connectivity.
Office	Business Unit/Branch	A separate branch office, under the same or a different National Provider Identifier (NPI), associated with the same Provider Agency.
Passcode	Alternative Device Code or Token number	Code generated by the FOB and entered by the service provider or CDS employee to validate the visit.
*Patient	Member	Person eligible to receive Medicaid services requiring the use of EVV.
Plan Code	Payer Plan Code	Code to identify a specific payer (HHSC or managed care organization)
*Provider/ Agency	Program Provider or Financial Management Services Agency (FMSA)	Program provider: Entity that contracts with HHSC or a managed care organization (MCO) to provide an EVV service. FMSA: Entity that contracts with HHSC or an MCO to provide financial management services to a CDS employer.
New Reason	EVV Reason Code Number and Description	Reason Code Numbers represent the overall issue for the need to complete visit maintenance. Reason Code Descriptions provide more detail about why visit maintenance was completed on an EVV visit transaction. In HHAX, select the Reason Code Number and Description from the **New Reason** list.
Representative	Designated Representative (DR)	Person designated by the CDS employer (member or Legally Authorized Representative) to assist or perform CDS and EVV responsibilities in the CDS option.
Secondary Identifier	API (Atypical Provider Identifier)	Unique number assigned to a program provider or FMSA instead of a National Provider Identifier (NPI) number. The Centers for Medicare and Medicaid Services (CMS) defines atypical program providers as a program provider or FMSA that does not provide healthcare.
Service Code	Healthcare Common Procedure Coding System (HCPCS) + Modifier	A collection of codes that represent procedures and services provided to individuals, based on the American Medical Association's Current Procedural Terminology (CPT).
Service Location	Service Delivery Location	Location where EVV services were provided. Valid values are Member Home, Family Home, Neighbor Home, and Community.
Shift	Visit	Time elapsed between the time the service provider clocked in for service delivery using an HHSC-approved

HHAX Term	Texas Term	Definition
		method and the time the service provider clocked out for service delivery using an HHSC-approved method.
UPR	---	Universal Patient Record (Linked Contract Patient)
Visit Time In	Bill Time In	Time the service provider clocked in for service delivery using an HHSC-approved clock-in method (auto-populated from the EVV Clock In when present on the visit).
Visit Time Out	Bill Time Out	Time the service provider clocked out for service delivery using an HHSC-approved clock-out method (auto-populated from the EVV Clock Out when present on the visit).

Caregiver Search

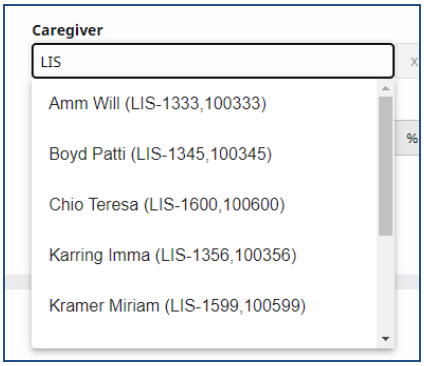
Select the **Caregiver Search** tab (selected by default). Use the filter fields (such as **Office** and **Status**) as well as **Advanced Filters** to narrow a Caregiver search to include **Team**, **Branch**, **Location**, **Discipline**, **Gender**, **Language**, **Date of Birth**, **SSN**, **Type**, **Caregiver**, **State**, **City**, **Zip**, **Compliance**, and **EVV Utilization**. The **Office(s)** field is required to generate a search.



Caregiver Search Page: Search Filters

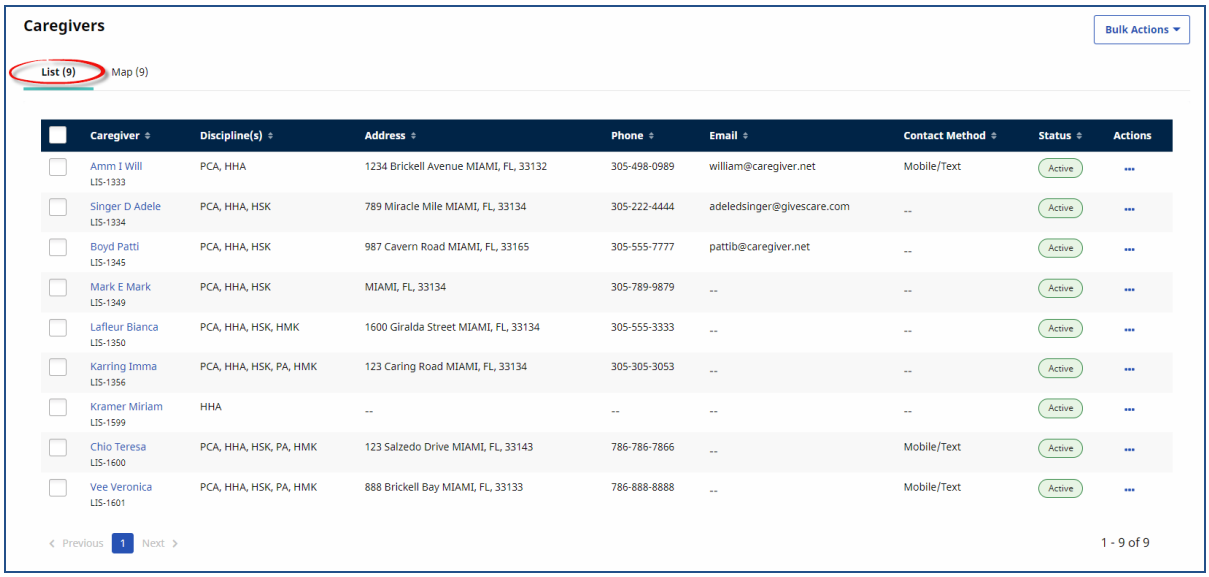
Note: *The **State** and **City** fields are auto-filled when a valid **Zip** is entered.*

A **Caregiver** field (with auto-suggest functionality) allows Providers to search for a specific Caregiver. Enter a Caregiver's Name or Code to generate matching Caregivers.



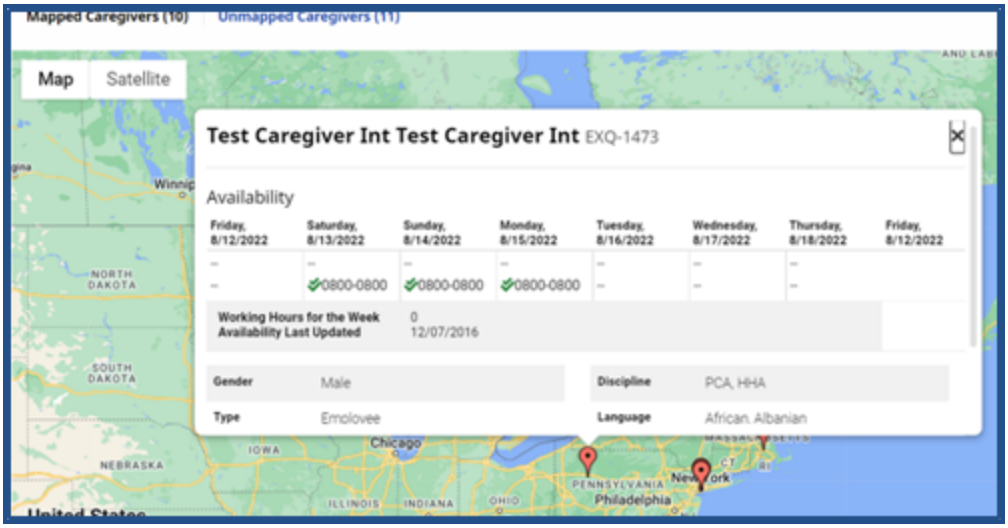
Caregiver Search Page: Caregiver Field

On the Search Results, the *List View* is the default view offering line item details to include specific Caregiver information such as the **Caregiver Name**, **Code**, **Discipline(s)**, **Address**, **Phone**, **Email**, preferred **Contact Method**, **Status**, and **Actions** (as seen in the image below).



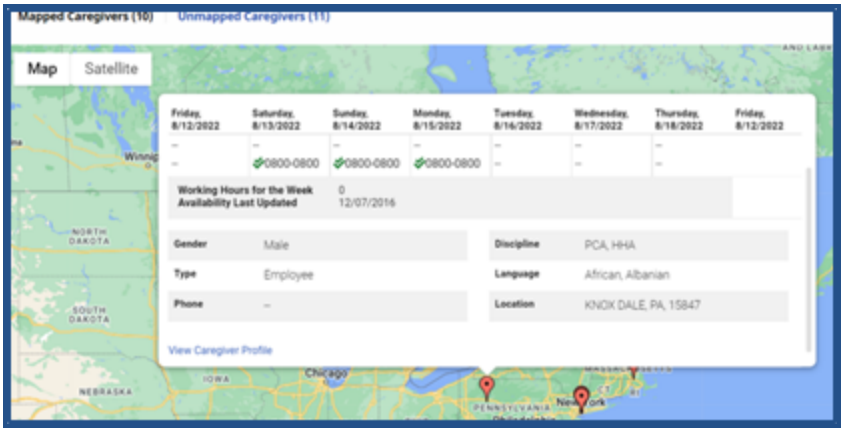
Caregiver Search: List View Results

Select the *Map* view to see Caregivers according to their location on the map. Caregivers appear as red markers. Hover over a marker to see a specific Caregiver's availability information on a pop-up window, as seen in the following image. Information provided includes the Caregiver's *Scheduled Visits*, *In Service*, *Absence*, *Working Hours for the Week* (*Preferred* and *Might Work*), and *Availability Last Updated*, as well as their *Demographics* (such as **Gender**, **Disciplines**, and **Language**).



Caregiver Availability Window

Scroll using the slide bar on the right. Click on the **View Caregiver Profile** link (at the bottom of the window) to route to the profile.



Caregiver Demographics

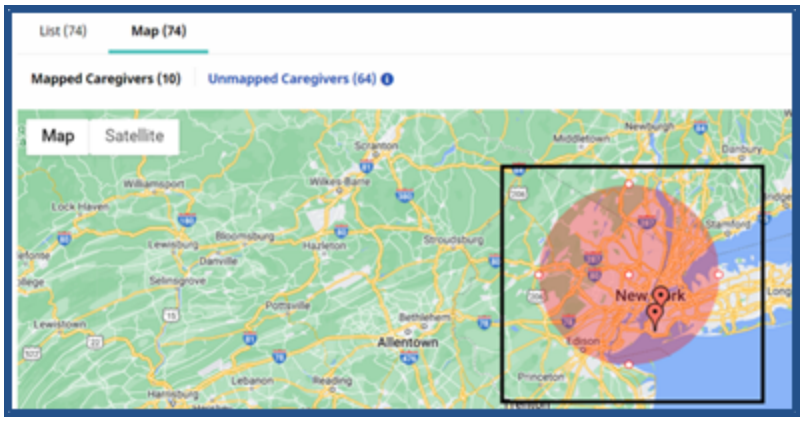
Map View: Selectable Area

From the *Map* view, Caregivers can be selected and assigned. Press the ***Shift*** key and click on the *Caregiver Search* option in the Map tab to select a pointed area. A circle with expansion points appears in the selected area, as seen in the following image.



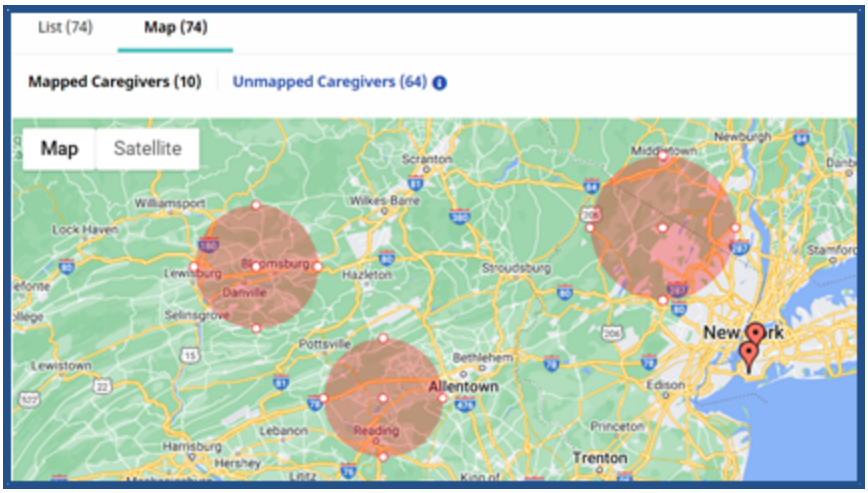
Select a Pointed Area

Use the points to expand the area range to select multiple Caregivers in the map, as seen in the following image.



Expand Selection

Multiple areas can be selected at a time, as illustrated below.



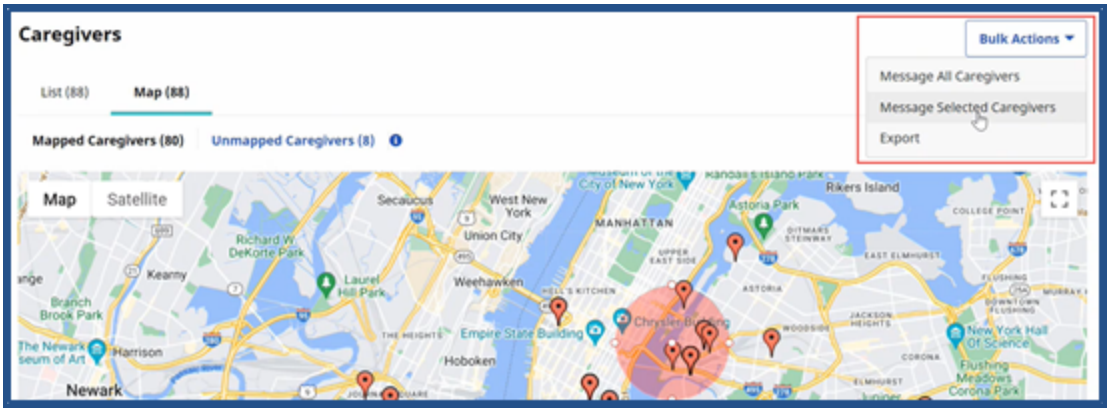
Select Multiple Areas

To delete a selected area, right-click on the circle and select ***Delete***.



Delete Selected Area

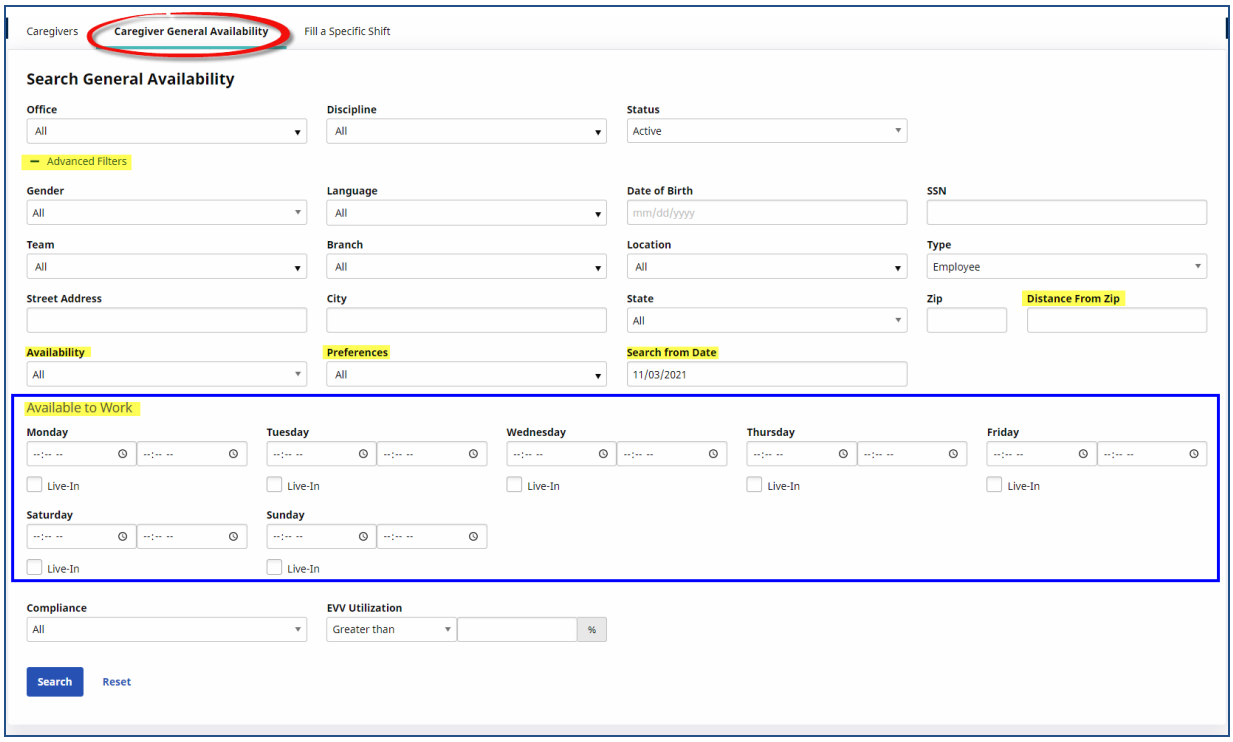
Once Caregivers are selected from the Map, click on the ***Bulk Actions*** button and select *Message Selected Caregivers*.



Map View: Message Selected Caregivers

Caregiver General Availability Search

To search for Caregiver availability, select the **Caregiver General Availability** tab in the *Caregiver Search* page, as seen in the following image. Additional filters appear for this search option to include **Availability**, **Preferences**, **Search from Date**, and **Distance from Zip**. In addition, the **Available to Work** section also appears to enter specific availability.

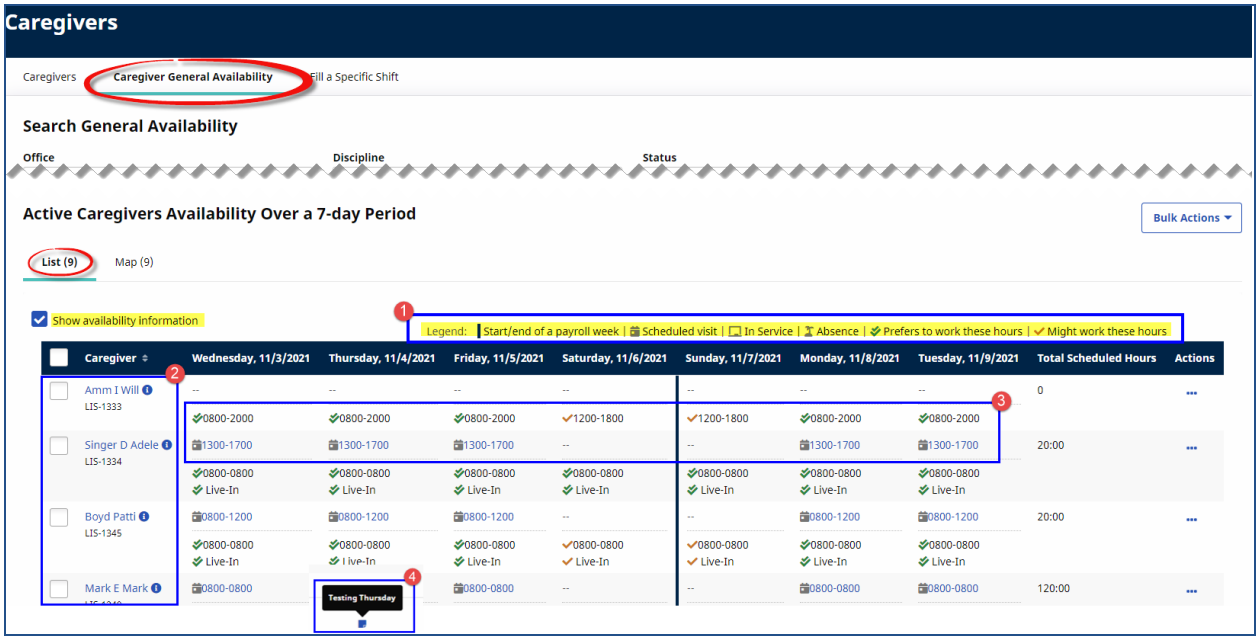


Caregiver Search: Availability Search Filters

By default, the current date on the **Search from Date** field is selected; required to search in the Availability option. Providers can search the current month, as well as one month in the past or one month into the future from the current date.

On the *List View* Search Results, a list of Caregivers appears according to the selected filters. Hover over the calendar icon under the **Availability** column to see the Caregiver's availability and shift preferences (as seen in the image below).

Several components are available offering better user visibility to include a *Legend*, *Icons*, *Tool Tips*, and *Notes*, as illustrated in the following image and described in the table underneath.

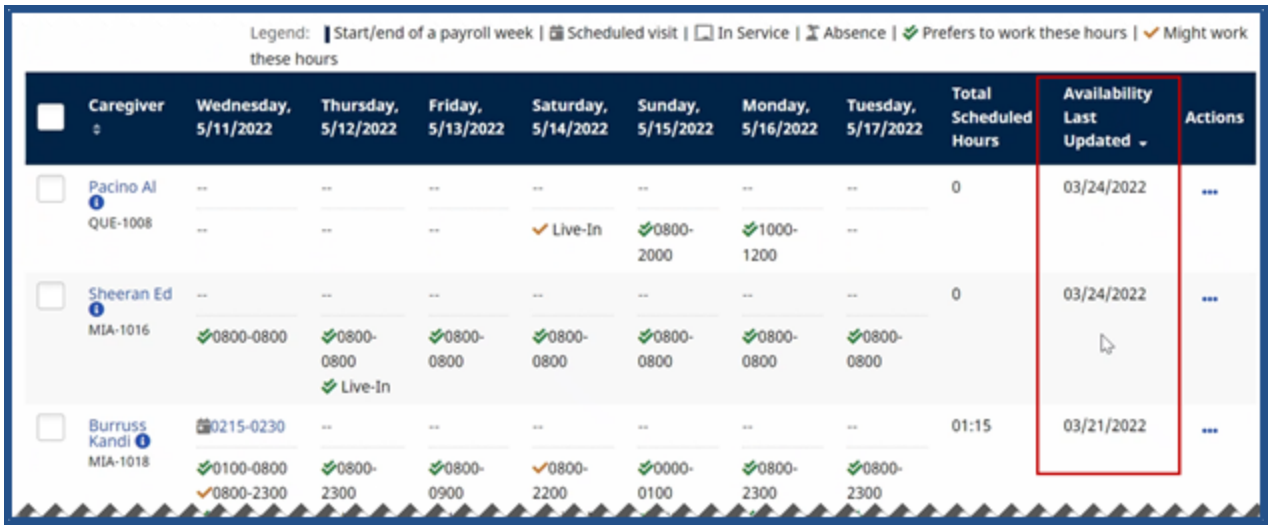


Availability Search: Search Results (Caregiver Availability and Shift Preferences)

	Component	Description
1	Legend	Defines the various corresponding icons that appear throughout the page displaying the *Start/End of Week*, *Scheduled Visits*, *In Service*, *Absence*, *Prefers to Work*, and *Might Work*.
2	Caregivers	A list of Caregivers found according to entered search criteria. Hovering over the (i) icon opens a pop-up window displaying the Caregiver information (as seen in the image below).  **Caregiver Information** **View Caregiver Profile** or **Assign to Shift** options are available at the bottom of the window.

	Component	Description
3	Caregiver Preferences	Displays a weekly view of the schedule the Caregiver prefers to work.
4	Notes	A blue note icon indicates an existing note entered for a Caregiver. Hovering over the note icon displays a tool tip with the note text.

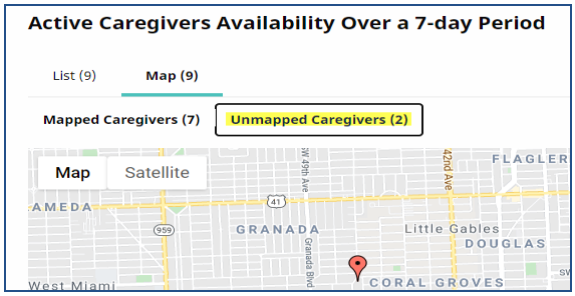
An **Availability Last Updated** (sortable) column is displayed on the *Caregiver General Availability* and *Fill a Specific Shift* pages, as seen in the following image.



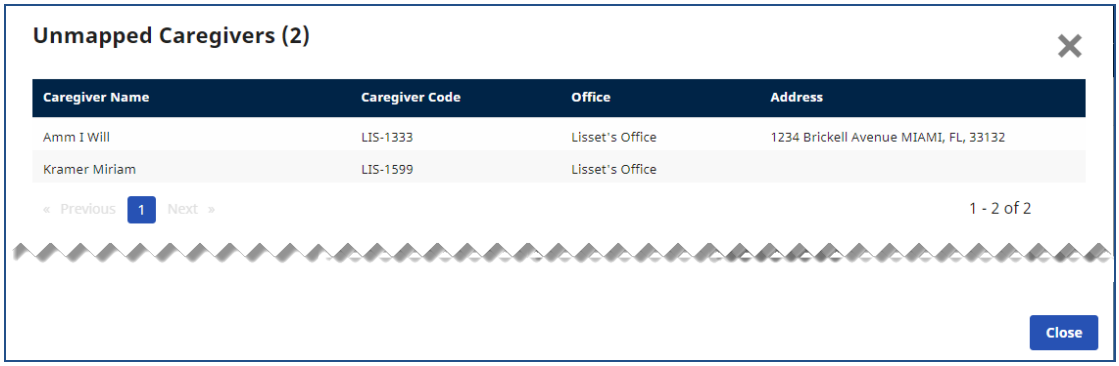
Caregiver Availability: Availability Last Updated Column

Map View

Select the *Map View* tab to see selected mapped Caregivers, as illustrated in the following image. To view unmapped Caregivers, click on the ***Unmapped Caregivers*** button to the right of the **Search Results** label to open the *Unmapped Caregivers* window, as illustrated in the image below.



Map View: Mapped Caregivers



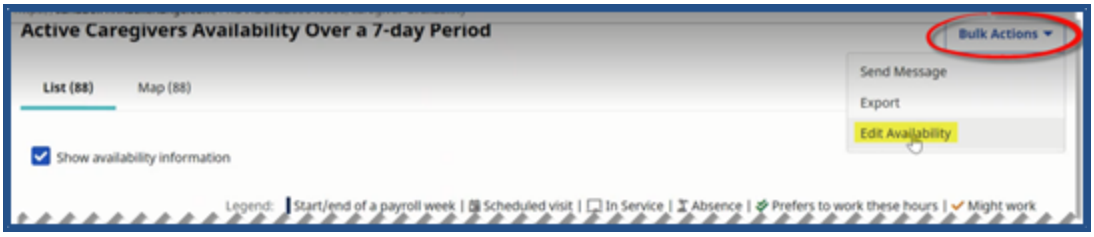
Unmapped Caregivers Window

Unmapped Caregivers are a result of incomplete or incorrect address information entered for a Caregiver in the Caregiver Profile. In these cases, the Google application is unable to locate the address. For example, if only a **City**, **State**, and **Zip** is entered in the Caregiver Profile without an **Address**, then the Caregiver cannot be mapped.

Caregiver Availability Bulk Edit

Providers can edit Caregiver availability for multiple Caregiver profiles at a time directly from the *Caregiver General Availability* search page (***Caregiver > Search Caregiver (New) >General Caregiver Availability***). This efficient method eliminates the need to go from profile to profile to maintain information updated.

On the *Caregiver General Availability* search page, select the applicable **Office** to generate a search. Click on the ***Bulk Actions*** dropdown and select *Edit Availability*, as seen in the following image.



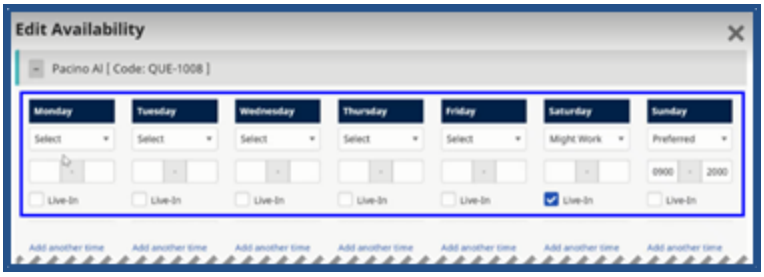
Caregiver Availability: Bulk Actions > Edit Availability

A list of available Caregivers is generated with expand (+) options to the left of each name. Select the + to expand availability options for a Caregiver, as seen below.



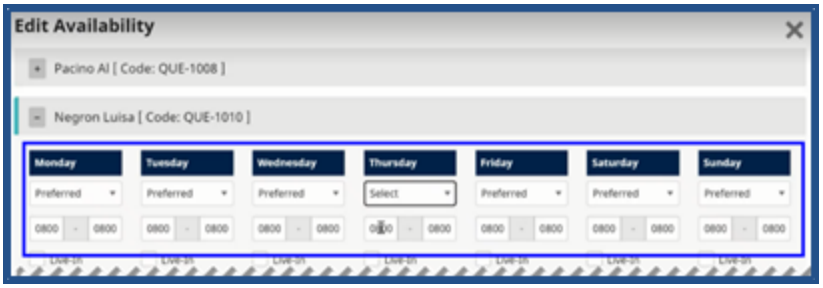
Expand to Edit Availability

The availability schedule opens for the selected Caregiver. Make the desired changes.



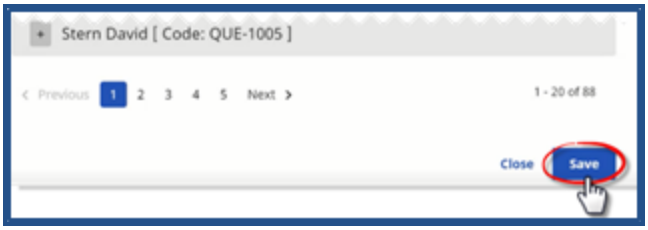
Edit Availability

Expand another Caregiver to edit availability.



Edit Availability for Another Caregiver

Once complete, scroll to the bottom of the page and click ***Save***.



Saving Caregiver Availability

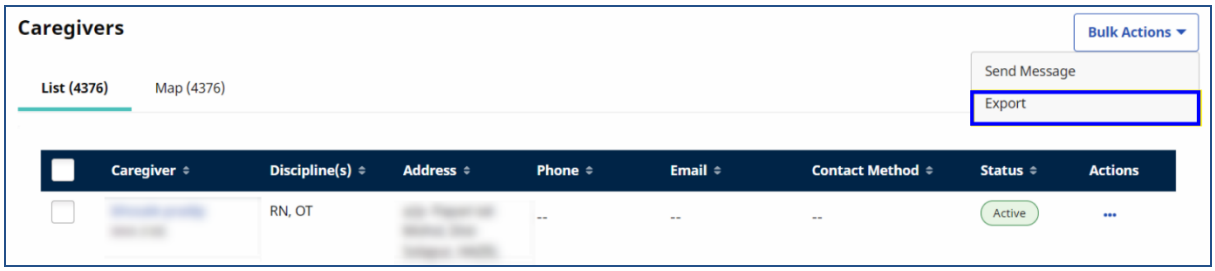
The system alerts of a successful update.



Availability Updated Successfully

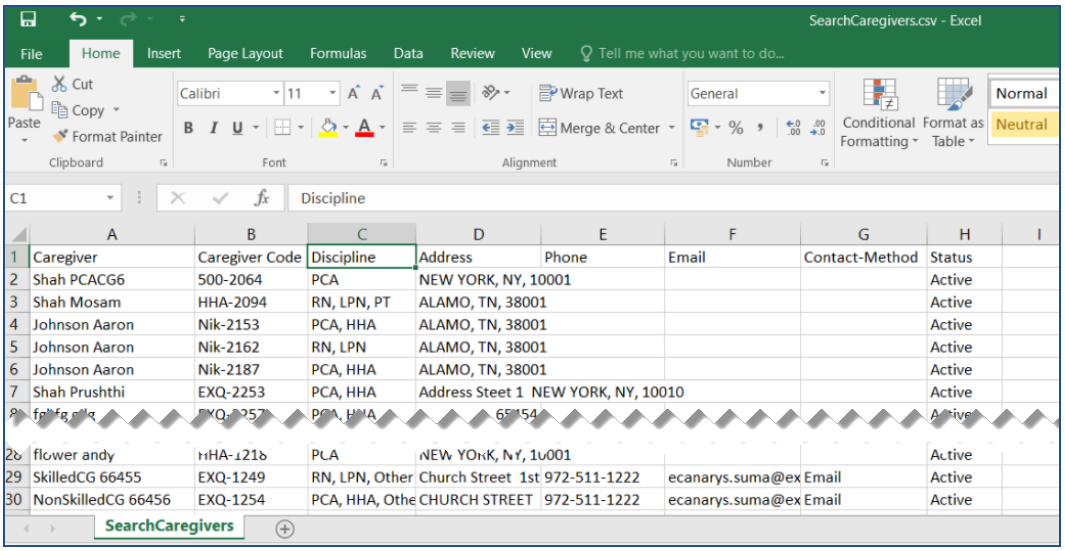
Bulk Action Export

An *Export* option is available from the ***Bulk Actions*** dropdown (as seen in the following image) to generate an Excel report of the Search Results.



Bulk Actions: Export

The results are generated in an Excel format CSV file, as seen below.



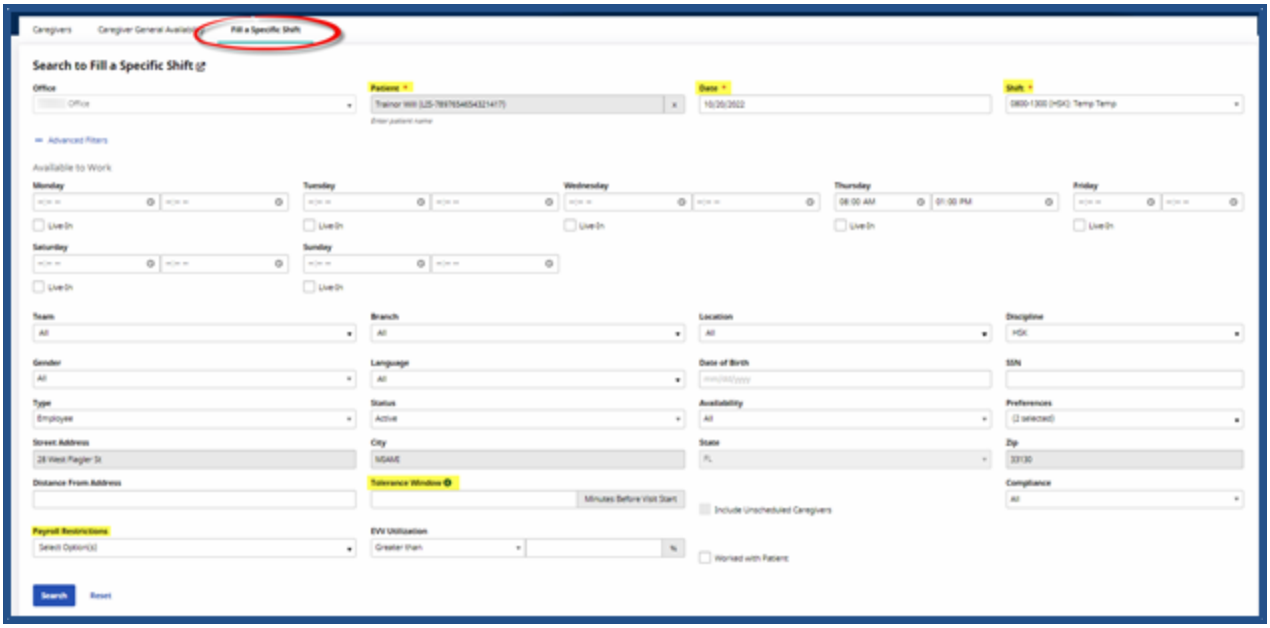
Caregiver Search: Export File

Fill a Specific Shift

New Image/Interface Updates

HHAeXchange is updating the system to fit Accessibility standards. As we work diligently on screen updates, note that some images within this document may still reflect an older version.

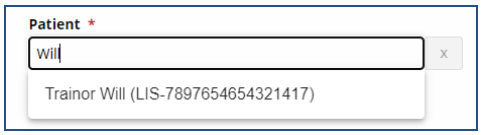
To search for Caregivers to fill a specific shift, select the **Fill a Specific Shift** tab on the *Caregiver Search* page. Once selected, additional filter fields appear to include **Patient**, **Date**, and **Shift** (all required as denoted by a red asterisk). In the **+Advanced Filters** section, other search options are available including a **Tolerance Window** to search by a Caregiver's live location as well as **Payroll Restrictions**, as seen in the following image. Refer to the Caregiver Live Location and the Payroll Restrictions respective sections below for details.



Caregiver Search: Fill A Shift (Added Filter Fields)

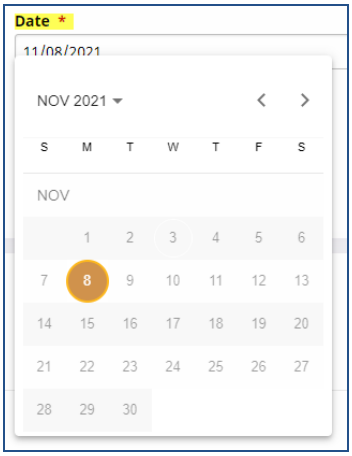
To ensure that a Caregiver is scheduled for a Patient in a corresponding office, the **Office** field becomes unavailable once a Patient is selected on the *Fill a Specific Shift* Caregiver Search page. The **Patient Address** field is automatically as well as the **City**, **State**, and **Zip** fields populate on the screen as seen in the following image above. Once all search parameters are chosen, click on the ***Search*** button.

The **Patient** field (required when using *Fill a Specific Shift* searches) has auto-suggest functionality to populate the Patient's Name and Patient ID, as seen in the image below.



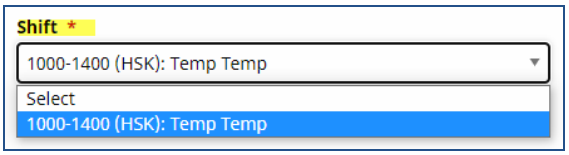
Auto-Suggest Patient Field

Select the calendar icon on the **Date** field to see the highlighted scheduled visits for the selected Patient.



Date Field: Scheduled Visit(s)

Select the shift from the **Shift** dropdown field. If a Patient has more than one visit on the selected date, then those shifts appear in this dropdown.

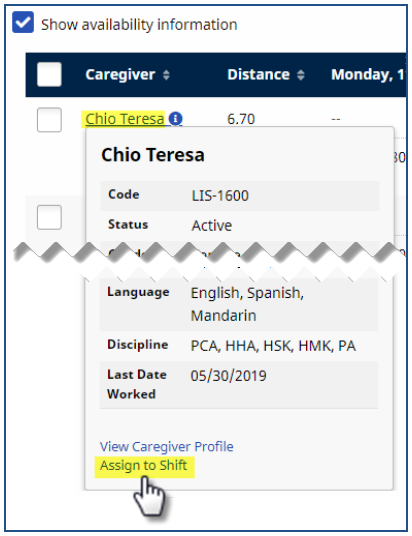


Shift Field

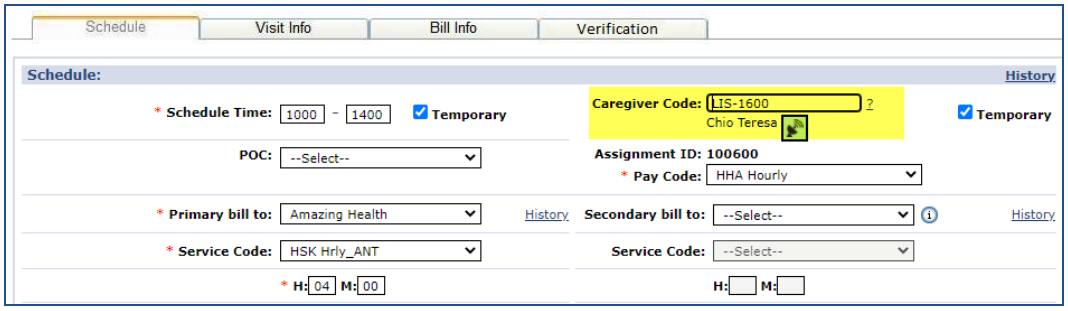
Assigning a Caregiver

On the *Search Results*, click on the Caregiver Name (link) to access a quick-view pop-up window providing Caregiver information such as **Name**, **Status**, **Gender**, **Address**, and **Phone**. Click on ***Assign to Shift*** to assign the Caregiver or click on ***View Caregiver Profile*** to access the Caregiver Profile.

Selecting ***Assign to Shift*** assigns the visit to the Caregiver. On the *Schedule* tab the Caregiver name and Code populate in the Caregiver Code field (as seen in the image below).

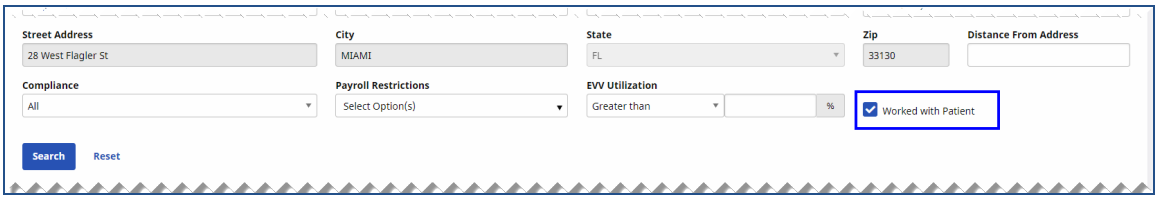


Assign Caregiver to Shift



Visit Schedule Tab: Caregiver Assigned to Shift

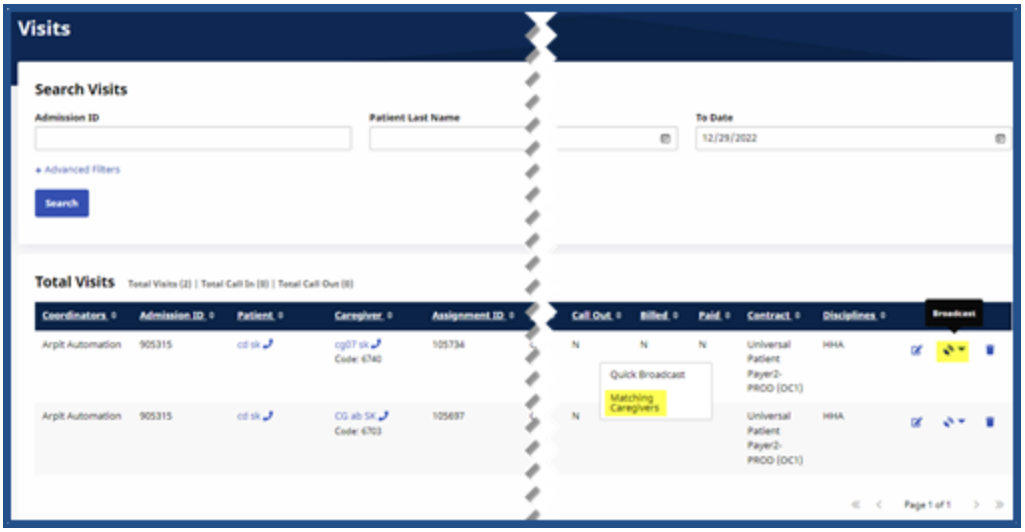
A **Worked with Patient** checkbox is available under the Advanced Filters section, as seen in the image below. When selected, the search results yield a list of Caregivers who have previously worked with the Patient in the last 3 months from the search date (with at least 1 confirmed visit).



Fill a Specific Shift: Advanced Filters: Worked with Patient Field

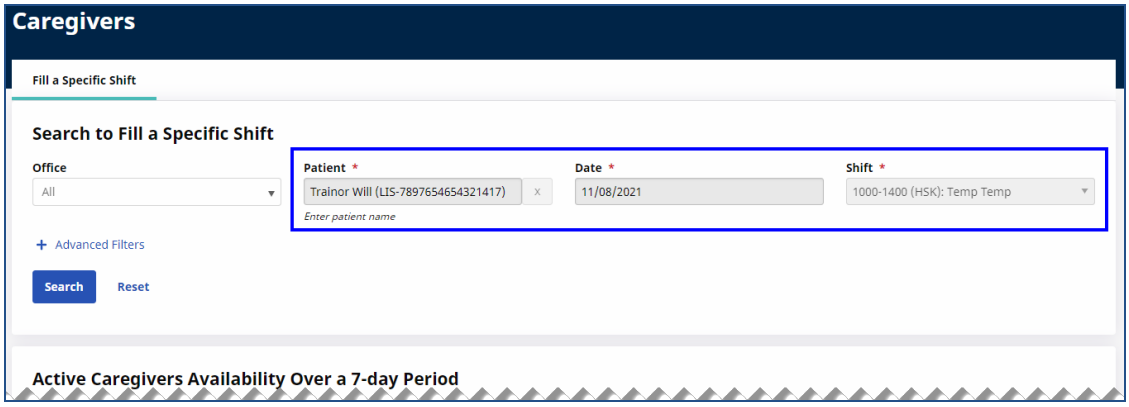
Case Broadcasting via the Fill a Shift Option

From anywhere a *Matching Caregivers* Case Broadcast is initiated, the system routes to the *Caregiver Communication/Availability* module to the **Fill a Specific Shift** option. For example, the image below illustrates a search via the Visit Search function (***Visit > Visit Search***) where a *Matching Caregiver* search is performed to fill a shift.



Visit Search Page: Searching for Matching Caregivers

Once *Matching Caregivers* is selected, the Provider is routed to the Caregiver Search/Availability module. Note that the **Patient**, **Date**, and **Shift** fields are automatically filled in the criteria. Select additional options, if desired.

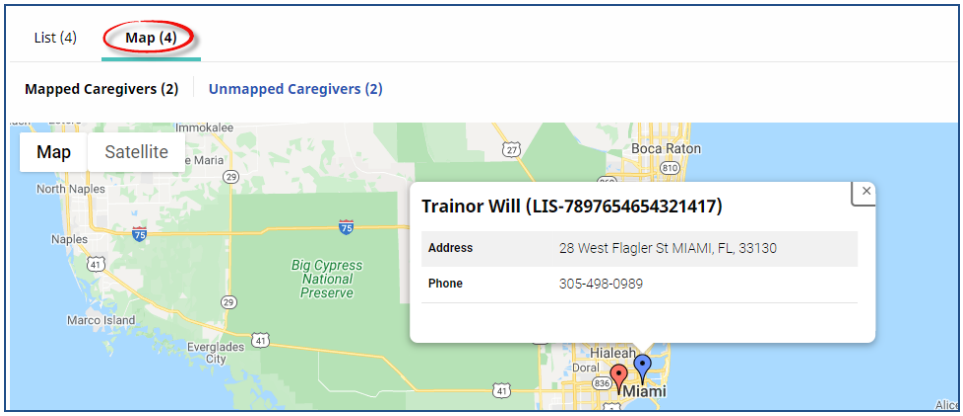


Caregiver Search: Fill a Specific Shift Option

Fill a Specific Shift: Display Patient Location on Map

Just as the Caregiver can be seen on the *Map View*, the Patient locator is seen as a blue pin when generating a Caregiver Search using the **Fill a Specific Shift** option. This helps to easily determine the Patient's location (blue pin) relative to the surrounding Caregivers (red pins), as seen in the following image.

Hover over the Patient location pin to view the Patient's information: Patient Name, Address, Phone Number, and Coordinator.



Fill a Specific Shift: Patient Locator on the Map View

Payroll Values in Advanced Filters

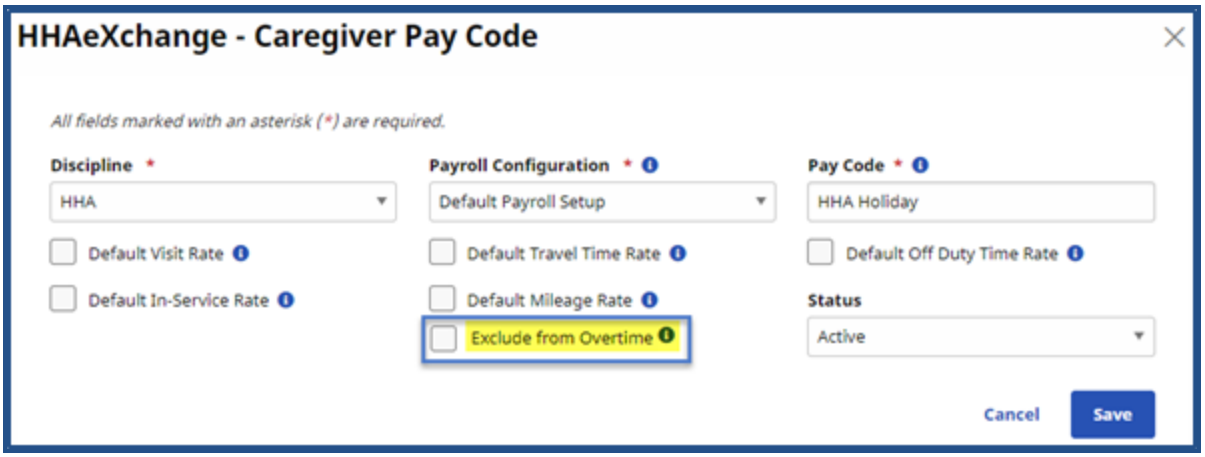
In the **Fill a Specific Shift** option, under the *Advanced Filters* section, payroll overtime rules values are displayed in the **Payroll Restrictions** filter field, selected to exclude Caregivers from a search with overtime potential. The following table contains the values and descriptions.

Value	Select to…
40 Hour OT	generate searches for Caregivers who have not exceeded the 40-hour overtime rule.
7 Day OT	exclude any Caregiver who has been scheduled for visits for 6 consecutive days from the selected shift to fill.
Spread of Hours	exclude any Caregiver who is already scheduled to work on the same day as the open shift and the scheduled visit is 10 hours from the unstaffed shift.

Note: *Search results do not include Missed visits and visits with a Non Payable Pay Code.*

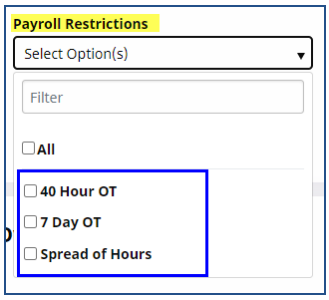
Exclude from Overtime Pay Code Setting

Payroll Restrictions work based on the **Exclude from OT** setting at the Caregiver Pay Code level (***Admin > Reference Table Management > Caregiver Pay Code***), to help control overtime (as illustrated in the following image). Payroll Restriction rules do not apply to those Providers who use Custom Payroll rules.



Caregiver Pay Code: Exclude from Overtime Checkbox

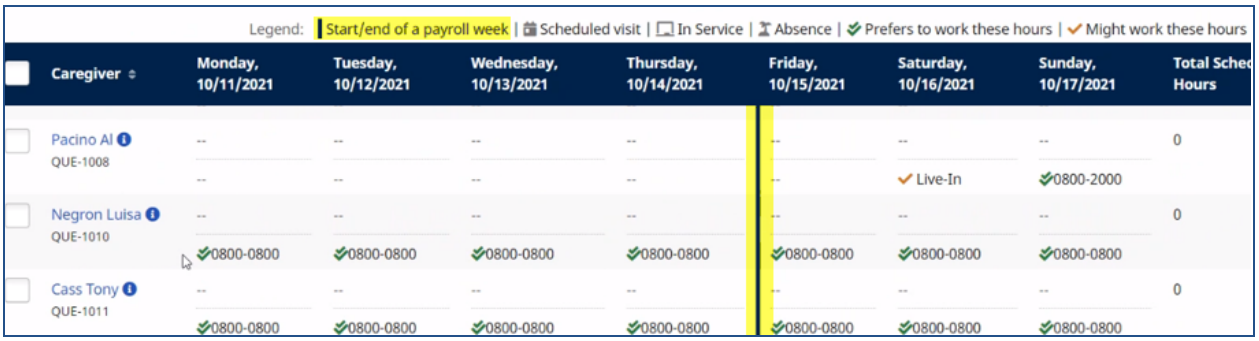
When the **Exclude from Overtime** option is selected at the Pay Code level, any visit with the assigned Pay Code is not considered in the Caregiver Search/Availability overtime rules to include: *40 Hour OT*, *7 Day OT*, and *Spread of Hours*.



Fill a Specific Shift: Payroll Restrictions

Highlight Payroll Week Ending Date on Availability

With the **Fill a Specific Shift** option, the Payroll Week Ending separator (based on the Payroll ***Week Ending Day*** configurations for an office) can be seen in the search results for visibility when assigning a shift (as illustrated in the following image).

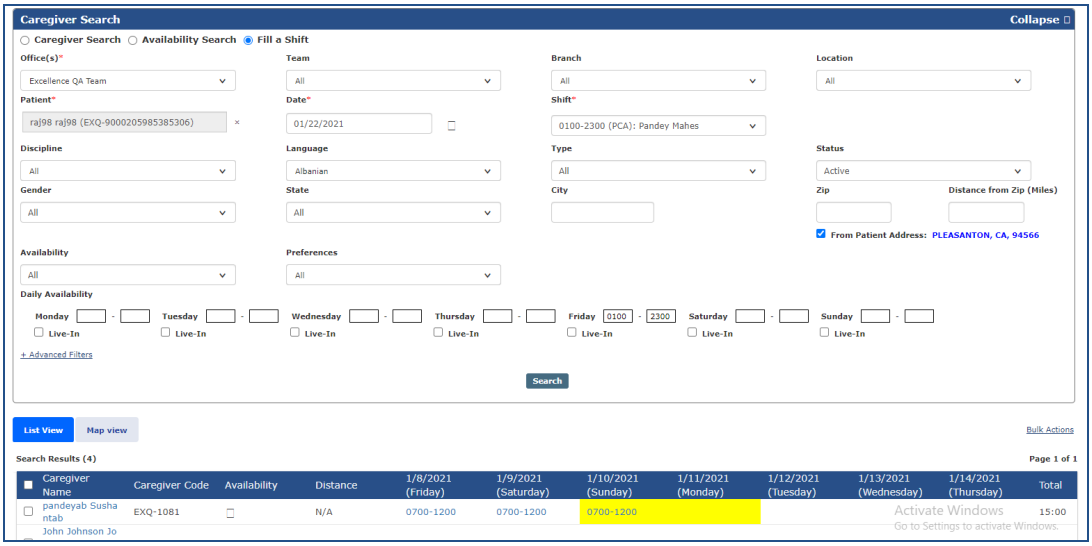


Fill a Shift Caregiver Search: Payroll Week Ending Day

Note: *If multiple offices are selected with a common* ***Week Ending Day****, then the separation details (Payroll Week Ending Day) are also displayed. Separation details are not visible if the multiple offices have different Payroll Week Ending Days.*

Highlight Seventh Consecutive Shift

On the **Fill a Specific Shift** Search Results, if the Caregiver has a seventh Consecutive Shift, then the cell is highlighted in yellow. This is a visual indicator for Providers to prevent OT when scheduling Caregivers. Essentially, if a Caregiver works 7 days in a row, regardless of the number of hours worked, they receive OT on the seventh day.

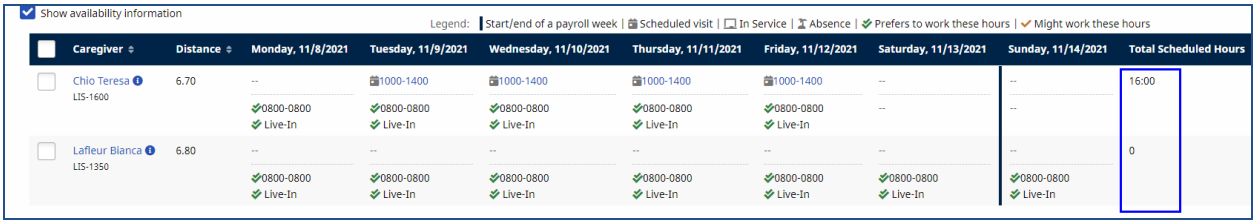


Fill a Specific Shift: Consecutive Shifs

Caregiver Search based on Payroll Week (Total Hours)

Using the ***Availability Search*** and ***Fill a Shift*** search options, Providers can use the **Total Scheduled Hours** calculation from the current payroll week to generate searches. The search results include the Caregivers' total scheduled hours.

The calculation for the scheduled hours is based on the payroll week. For example, when using the ***Fill a Shift*** search, the **Total Scheduled Hours** column reflects the number of hours each Caregiver is scheduled for in the payroll week that the open shift is part of (as seen in the image below).



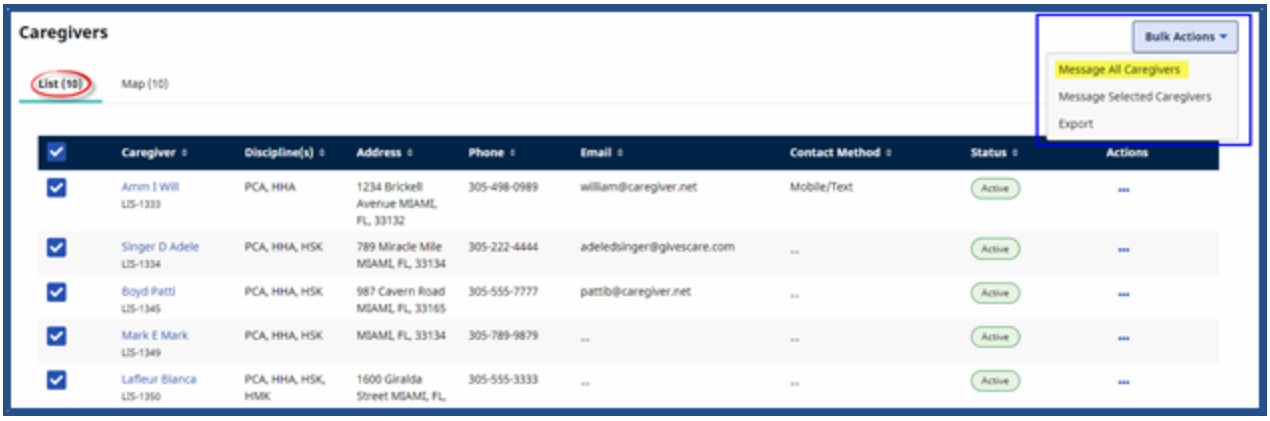
Payroll Week: Total Hours

Sending a Message Via Caregiver Search

Navigate to the *Caregiver Search* page (***Caregiver> Search Caregiver (New) > Search Caregiver*** to generate a Caregiver Search. The Search Results yield a list of Caregivers based on the entered search criteria. On the results, each line item contains the **Caregiver Name (Code)**, **Discipline(s)**, **Address**, **Phone**, **Email**, preferred **Contact Method**, **Status**, and **Actions**.

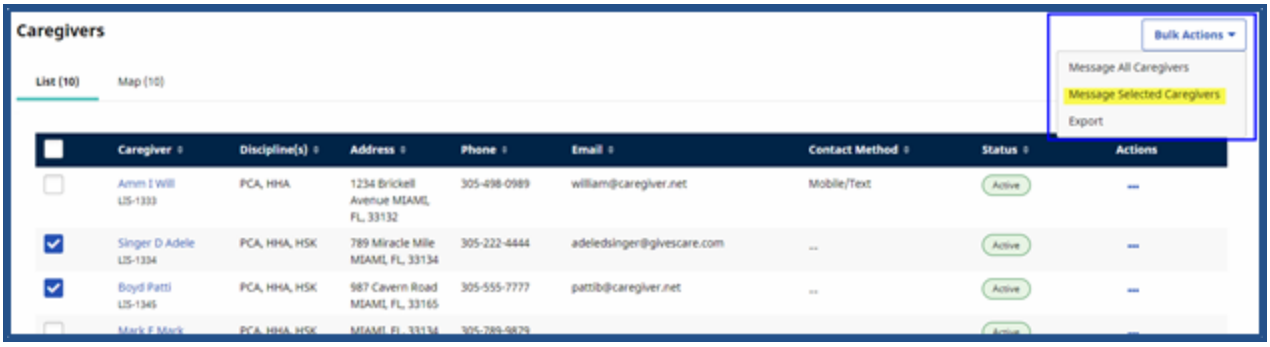
From the results, select the Caregivers to message. Selecting all per page only selects the Caregivers on the page (50 per page). Click on the ***Bulk Actions*** button (located on the top-right section of the Search Results) and select *Send Message*.

From the results, select the Caregivers to message. Selecting all per page only selects the Caregivers on the page (50 per page). Click on the ***Bulk Actions*** button (located on the top-right section of the Search Results) and select *Message All Caregivers*.



Sending a Message to All Caregivers via Caregiver Search

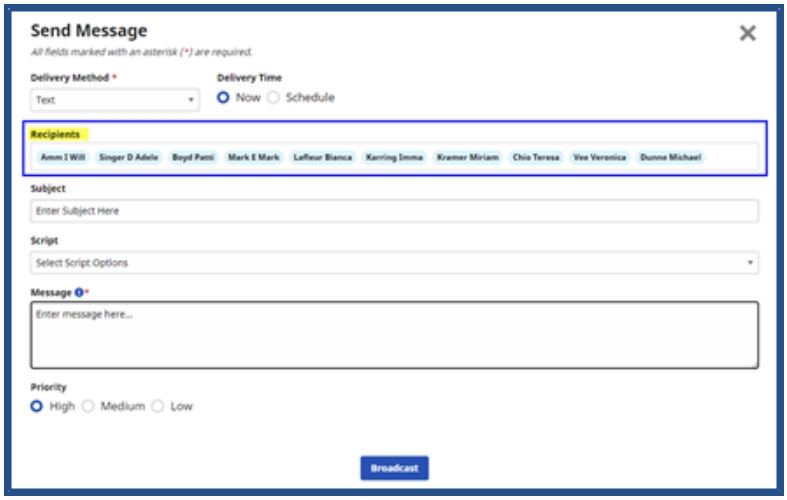
To message *selected* Caregivers on the search, select the Caregiver(s) on the page. Click on the ***Bulk Actions*** button and select *Message Selected Caregivers*.



Sending a Message to Selected Caregivers via Caregiver Search

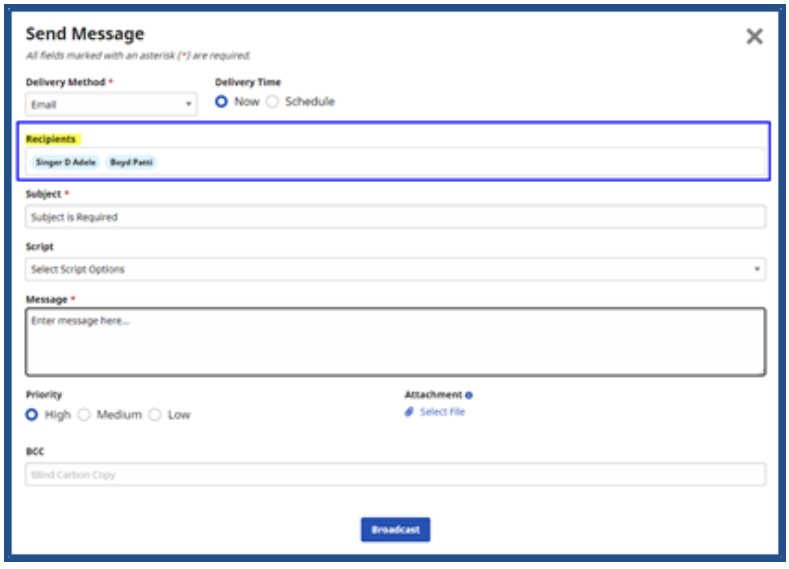
Send Message Window

The *Send Message* window opens. When *Message All Caregivers* is selected, all Caregivers appear in the **Recipients** field. Select or enter the necessary information for the required fields: **Delivery Method**, **Script**, **Message**, and **Priority** (as seen in the following image). In this example, *Text* is selected as the **Delivery Method**.



Broadcast Message to All Caregivers: Text Delivery Method

When *Message Selected Caregivers* is chosen, then only the selected Caregivers appear in the **Recipients** field, as seen in the following image. Controls display based on the selected **Delivery Method**. In this example, *Email* is selected; therefore, the **Subject**, **Bcc** and **Attachment** fields become available.

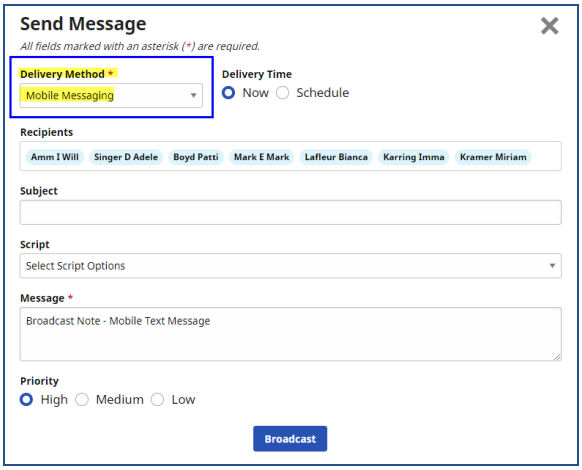


Broadcast Message to Selected: Email Delivery Method

Mobile App Delivery Methods

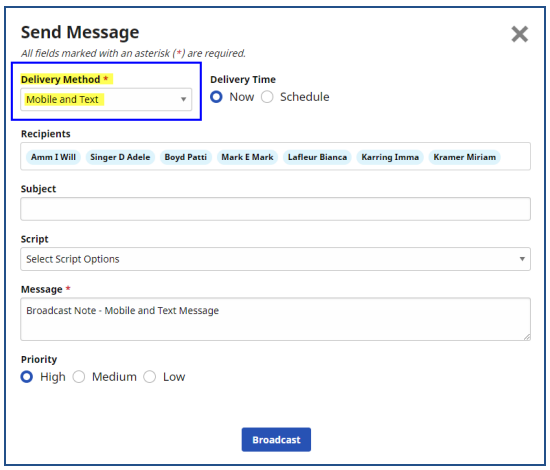
Mobile App Messaging options are also available.

When the ***Mobile Messaging*** option is selected, then only a Mobile Message is broadcasted.



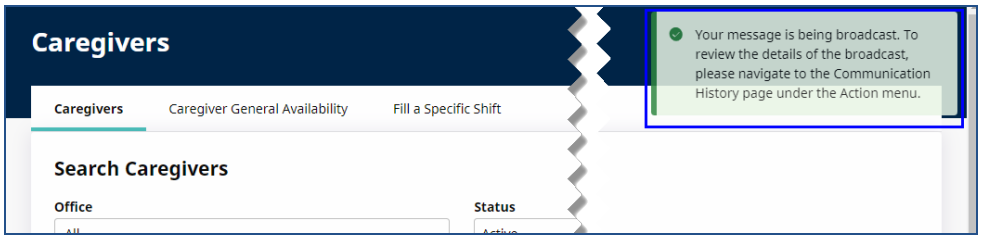
Broadcast Message: Mobile Messaging

When the ***Message and Text*** option is selected, and the Caregiver's Unique Mobile ID is enabled with a Device ID, then a Mobile Message is broadcasted; otherwise a text message is sent.

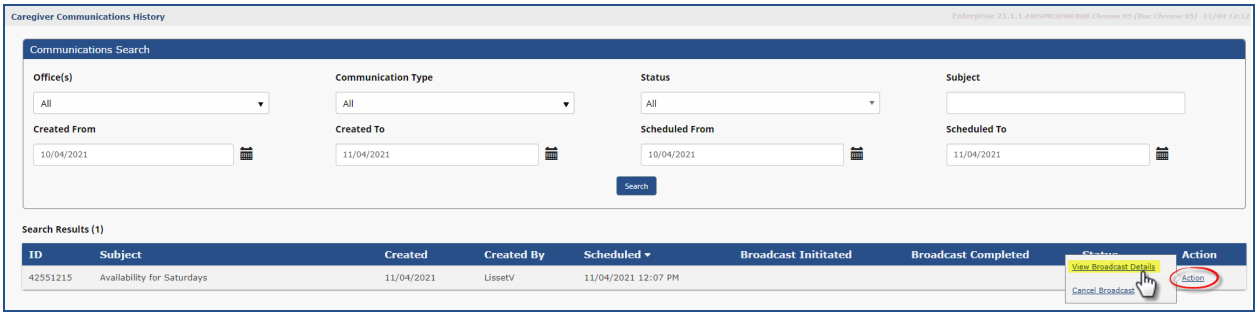


Broadcast Message: Mobile and Text

Once complete, click on the ***Broadcast*** button to send the message. A confirmation message appears on the top-right corner of the screen to alert that the message is successfully sent.

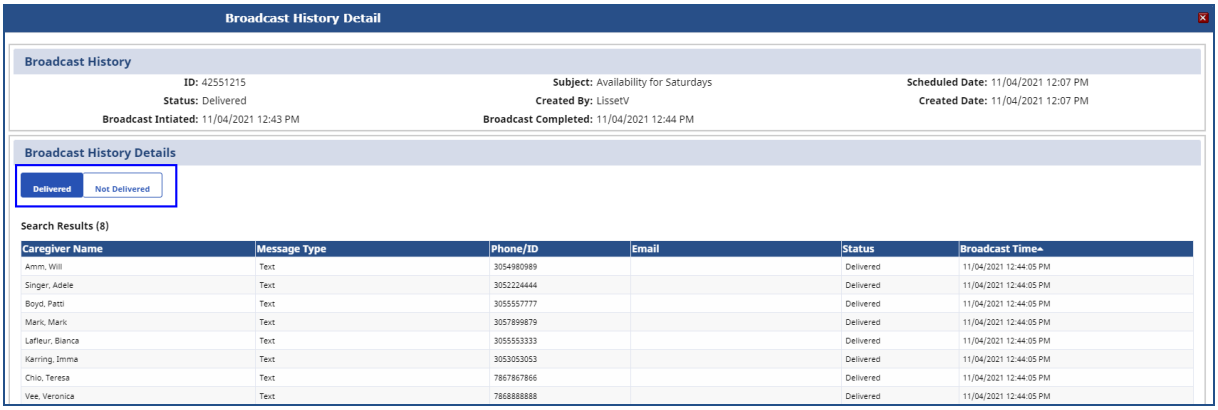


To view broadcast details, navigate to the *Caregiver Communications History* page (***Action > Caregiver Communications History***) and search for the communication using the search filters. On the Search Results, select *View Broadcast Details* from the Action link (as seen in the image below).



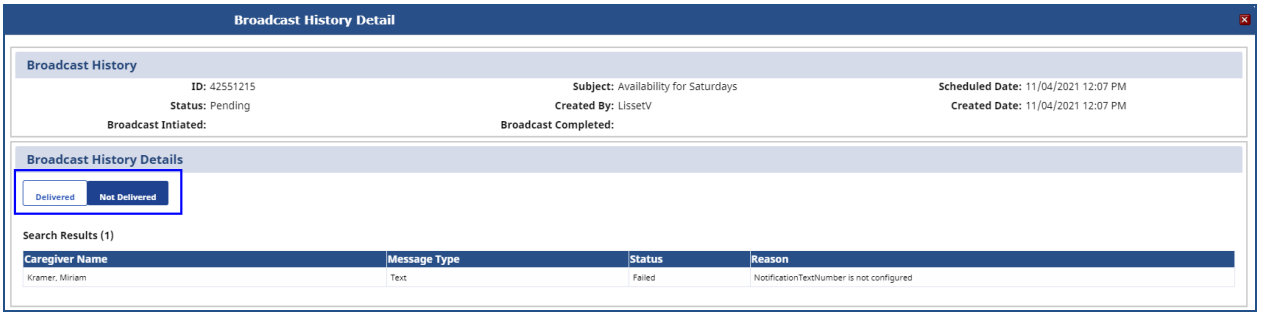
View Broadcast Details

The *Broadcast History Detail* page opens with the details. The Message is sent to the selected Caregivers' Mobile Numbers, listed under the ***Delivered*** selection (default).



Broadcast History Detail: Delivered Broadcast

Select ***Not Delivered*** to view a list of Caregivers who did not receive the message because of their notification preferences, as seen in the following image.

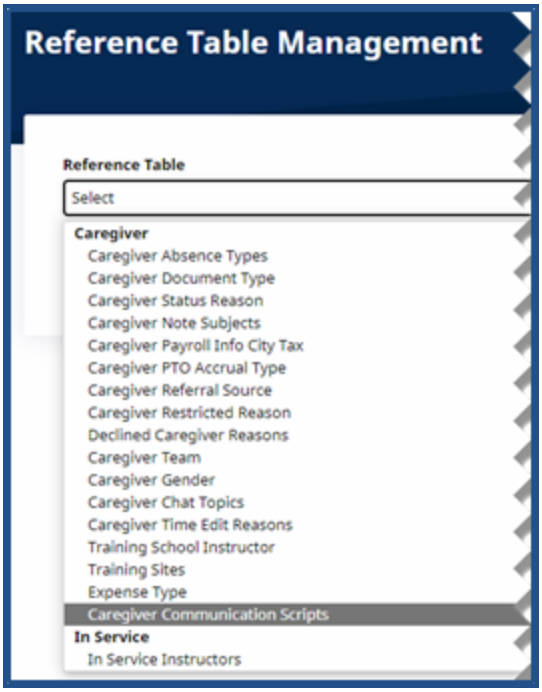


Broadcast Not Delivered

Message Scripts via Reference Table Management

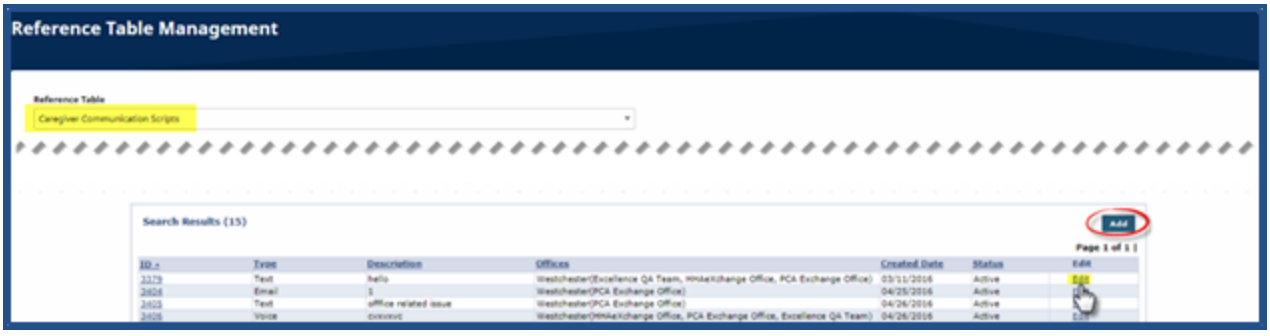
Message scripts are created and managed via the Reference Table Management functionality. To access, navigate to ***Admin > Reference Table Management***. From the **Reference Table** field, select ***Caregiver Communication Scripts*** from the *Caregiver* category.

Click on the ***Search*** button to access the *Caregiver Communication Scripts* grid (as seen in the image below).



Reference Table: Caregiver Communication Scripts

Note: *Voice Scripts are no longer available. Refer to the instructions below to change voice script types to either text or email.*

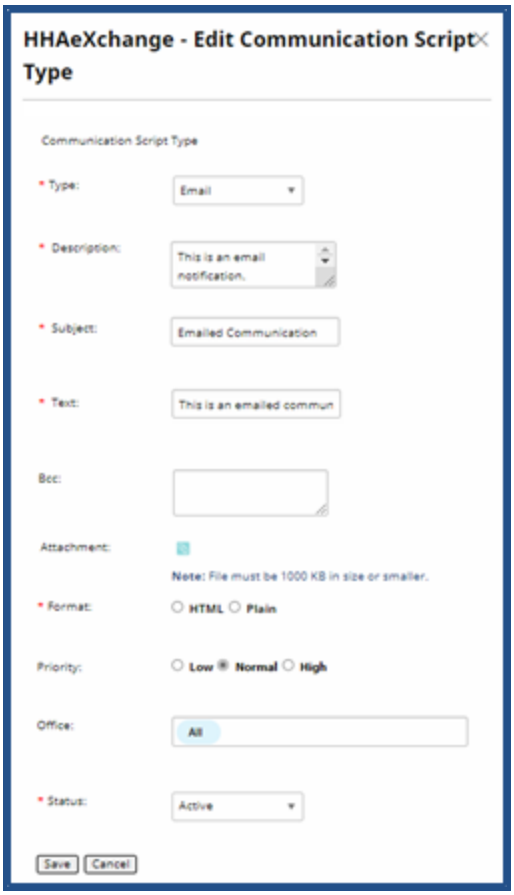


Reference Table Management: Caregiver Communications Scripts

To add a new Script, click on the ***Add*** button and complete the required fields in the Add Communications Script Type window.

To edit a Script, click on the Edit link from the existing script in the Reference Table. The *Edit Communication Script Type* window opens. Select or enter required fields (denoted with a red asterisk).

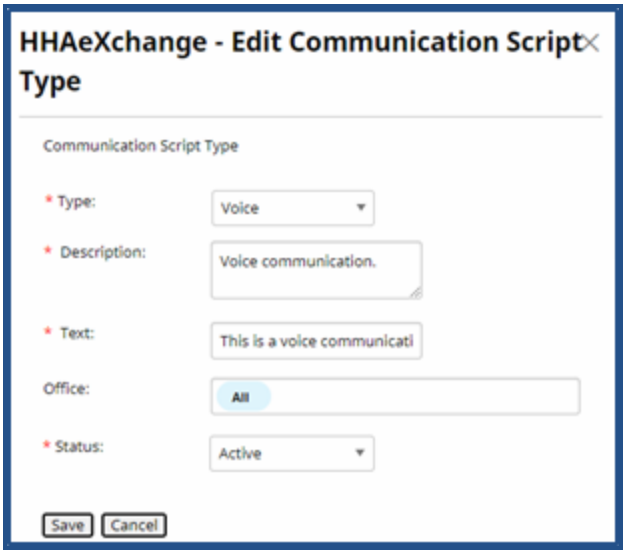
If *Email* **Type** is selected, then the **Subject**, **Bcc** and **Attachment** fields populate as required.



Email Script Type Fields

If *Voice* (Mobile) **Type** is selected, then the default fields appear.

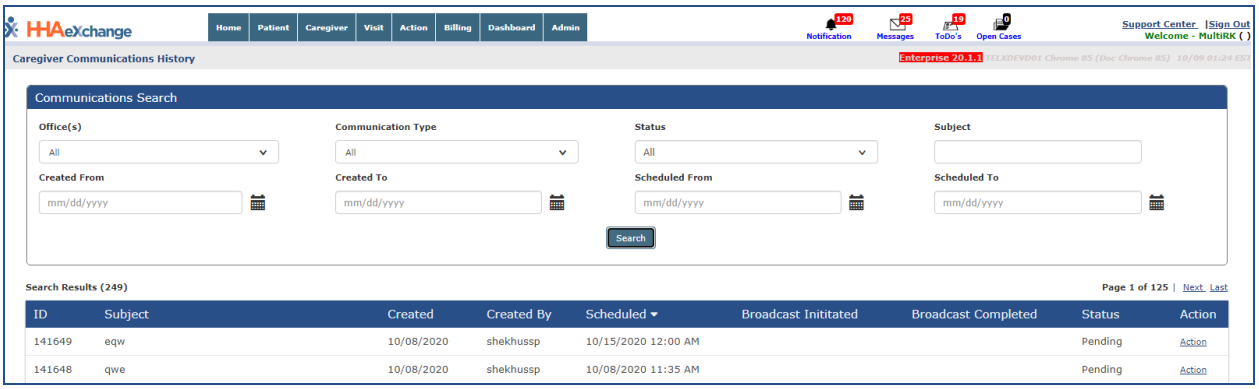
Proprietary and Confidential



Voice Script Type Fields

Caregiver Communications History Page

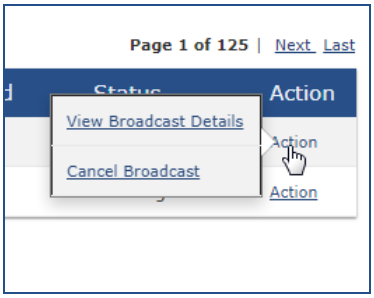
Navigate to ***Action > Caregiver Communication History*** to access the *Caregiver Communications History* page. Use the available search filters to locate specific communications. From the Search Results, view the list of communications returned based on the chosen criteria.



Caregiver Communication History Search

Note: *Ensure to select a* ***From Date*** *that is not further into the future than the* ***To Date****.*

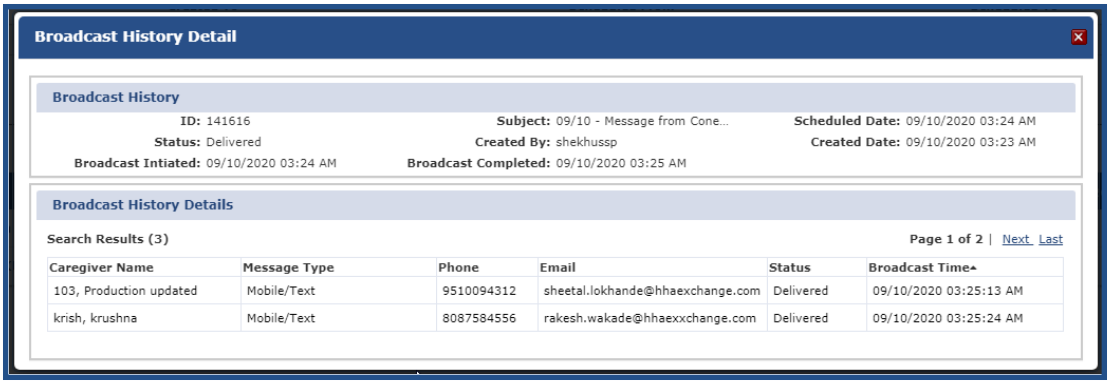
Select the Action link from the respective communication to either *View Broadcast Details*, *Cancel Broadcast*, or *Print* the message.



Action selections depend on the Broadcast Status. While *View Broadcast Details* is available for all messages, the *Cancel Broadcast* is available only for Pending and In Progress broadcasts. *Print* becomes available for Delivered, Failed, and Cancelled messages.

View Broadcast History Details

When ***View Broadcast Details*** is selected, the *Broadcast History Detail* window opens (as seen in the following image). The *Broadcast History* section indicates the message details such as **Subject**, **Scheduled Dates**, **Created Date**, **Created By**, **Status**, and other details. The *Broadcast History Details* section provides a list of Caregivers who the broadcast was issued to.



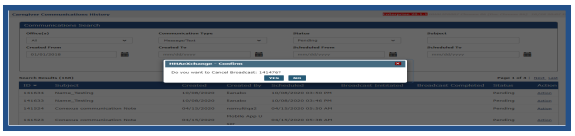
Broadcast History Detail Window

Cancel Message Broadcasts

Broadcasts with a *Pending* or *In Progress* Status can be cancelled. When ***Cancel Broadcast*** is selected, a Confirmation pop-up appears. Click ***YES*** to cancel the broadcast.



Cancel Broadcast



Broadcast Cancellation Confirmation

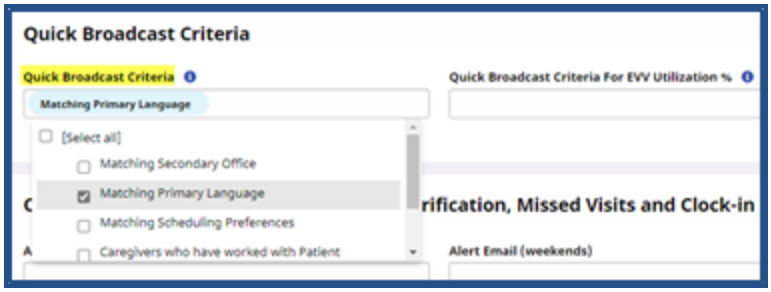
Quick Broadcast Criteria Section at Agency Setup

Providers can configure Quick Broadcast criteria via the *Quick Broadcast Criteria* section on the *Agency Info* page (***Admin > Agency Profile***). In addition to these criteria, Quick Broadcasts continues to follow standard rules when a request for service is sent.

This includes sending requests to Caregivers who match the Patient's office, are *Active*, and are available to work (for example, availability on their schedule, no restrictions for the contract, etc.).

Select specific options from the **Quick Broadcast Criteria** dropdown field, to include:

- Matching Secondary Office
- Matching Primary Language
- Matching Scheduling Preferences
- Caregivers who have worked with Patient
- Exclude Overtime Caregivers
- Exclude Non-Compliant Caregivers



Quick Broadcast Criteria Field

In addition, Providers can also set a default percentage value in the **Quick Broadcast for EVV Utilization %** field, as seen in the image to the right.



Quick Broadcast Criteria: EVV Utilization Field

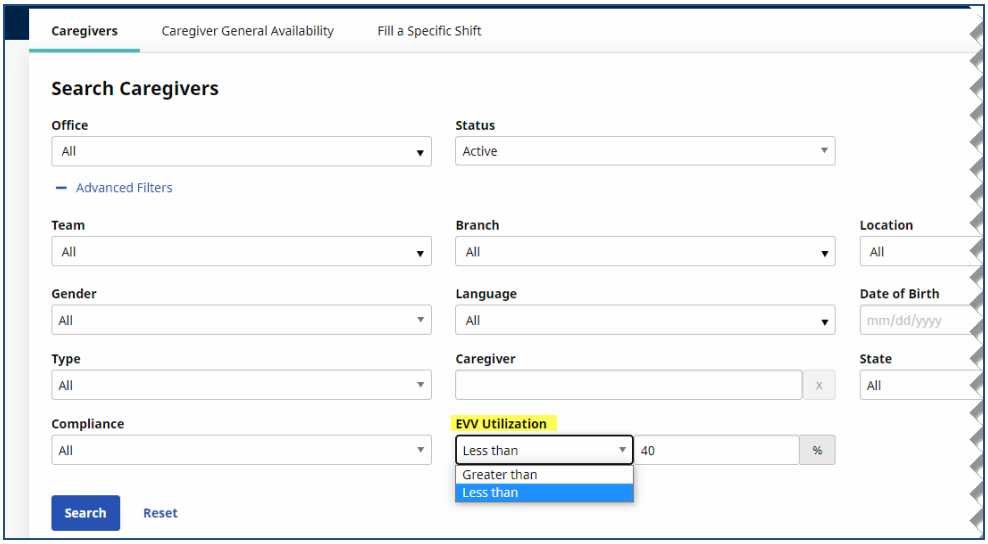
EVV Utilization Tracking

Caregiver Search: EVV Utilization

Use the **EVV Utilization** filter field under the Advanced Filters section of the Caregiver Search module to search for Caregivers with an *Active* status who meet a specified EVV compliance percentage. Via a weekly refresh, the system searches back up to three months of visits from the search date (not including Missed Visits) for Caregivers who have entered EVV Utilization.

This filter is available for all modes of search to include **Caregiver**, **Caregiver General Availability**, and **Fill a Specific Shift** options.

Enter a percentage (numeric) value in the **EVV Utilization** field, select ***Greater than*** or ***Less than*** from the dropdown and click ***Search*** to generate a Caregiver search. In the following example, the system returns a list of Caregivers with an EVV Utilization of 40 or less, as entered in the filter.



EVV Utilization Search: Greater or Less Dropdown Field

Caregiver EVV Utilization on Caregiver Profile

On the Caregiver's Profile page (***Caregiver > Search Caregiver***), a field titled **EVV Utilization** is displayed under the *Employment Info* section (as seen in the following image). This field indicates the EVV Utilization based on the Caregiver's last 3 months of EVV visit percentage count.

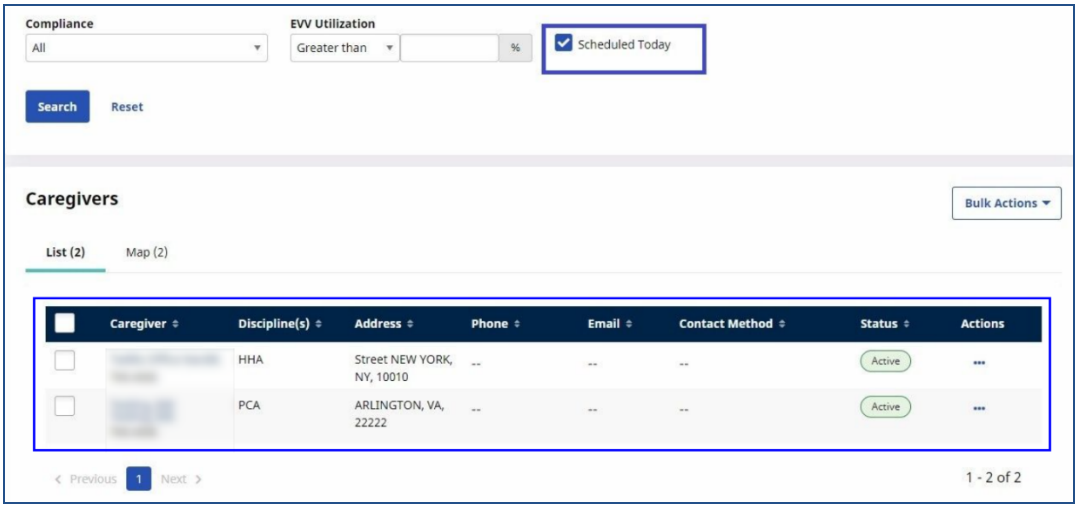


Caregiver Profile: EVV Utilization (Percentage Count) Field

Scheduled Today Field

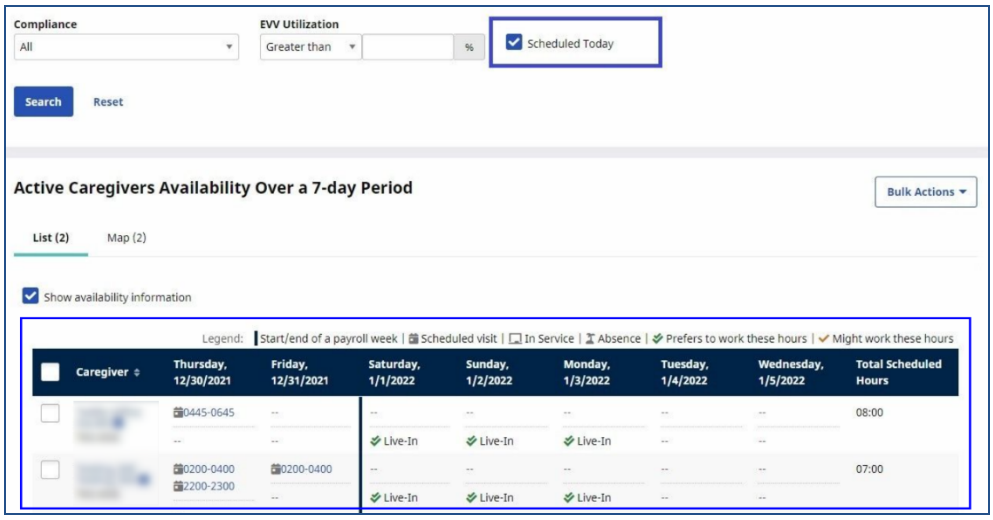
A **Scheduled Today** search checkbox is available under the *Advanced Filters* section in all Caregiver Search pages (*Caregivers*, *Caregiver General Availability*, and *Fill a Specific Shift*) to search for only visits scheduled for the current day.

When **Scheduled Today** is selected, the Search Results yield only Caregivers scheduled for the day, as seen in the following image.



Caregivers Page: Scheduled Today

On the *Caregiver General Availability* tab, when **Scheduled Today** is selected, the Search Results yields the Caregivers and their 7-day availability schedule, as seen in the image below. The same applies to the *Fill a Specific Shift* page.



Caregiver General Availability Page: Scheduled Today