

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 <u>HHAX Support Team</u> 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 <u>HHAeXchange Cus</u>tomer Support.

HHAX System Key Terms and Definitions

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

Term	Definition
Dationt	Refers to the Member, Consumer, or Recipient. The Patient is the person
Patient	receiving services.
Caragivar	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Care-
Caregiver	giver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Dever	Refers to the Managed Care Organization (MCO), Contract, or HHS. The
Payer	Payer is the organization placing Patients with Providers.
ННАХ	Acronym for HHAeXchange



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.

Caregivers			
Caregivers Caregiver General Availability Fi	ll a Specific Shift		
Search Caregivers			
Office	Status		
All	Active	*	
- Advanced Filters			
Team	Branch	Location	Discipline
All	All	v All v	All
Gender	Language	Date of Birth	SSN
All	All	mm/dd/yyyy	
Туре	Caregiver	State	City Zip
All		All	
Compliance	EVV Utilization		
All	Greater than 🔻 96		
Search Reset			

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 LIS	×
Amm Will (LIS-1333,100333)	^
Boyd Patti (LIS-1345,100345)	%
Chio Teresa (LIS-1600,100600)	
Karring Imma (LIS-1356,100356)	
Kramer Miriam (LIS-1599,100599)	
	-

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).



egiv	vers							Bulk Action
st (9)	Map (9)							
	Caregiver ‡	Discipline(s) ≑	Address ÷	Phone ¢	Email ÷	Contact Method 🗢	Status ≑	Actions
	Amm I Will LIS-1333	PCA, HHA	1234 Brickell Avenue MIAMI, FL, 33132	305-498-0989	william@caregiver.net	Mobile/Text	Active	
	Singer D Adele LIS-1334	PCA, HHA, HSK	789 Miracle Mile MIAMI, FL, 33134	305-222-4444	adeledsinger@givescare.com		Active	
	Boyd Patti LIS-1345	PCA, HHA, HSK	987 Cavern Road MIAMI, FL, 33165	305-555-7777	pattib@caregiver.net		Active	
	Mark E Mark LIS-1349	PCA, HHA, HSK	MIAMI, FL, 33134	305-789-9879			Active	
	Lafleur Bianca LIS-1350	PCA, HHA, HSK, HMK	1600 Giralda Street MIAMI, FL, 33134	305-555-3333			Active	
	Karring Imma LIS-1356	PCA, HHA, HSK, PA, HMK	123 Caring Road MIAMI, FL, 33134	305-305-3053			Active	
	Kramer Miriam LIS-1599	ННА					Active	
	Chio Teresa LIS-1600	PCA, HHA, HSK, PA, HMK	123 Salzedo Drive MIAMI, FL, 33143	786-786-7866		Mobile/Text	Active	
	Vee Veronica LIS-1601	PCA, HHA, HSK, PA, HMK	888 Brickell Bay MIAMI, FL, 33133	786-888-8888		Mobile/Text	Active	
	_							

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 popup 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**).

Mapped C	aregivers (10)	Unmapped	Caregivers (11)					
Мар	Satellite		Contra la	1	to '	1 I		324	ANDL
	40	Test Care	egiver Int	Test Care	giver Int	EXQ-1473			×
-	Winnip	Availability							
	5. 3	Friday, 8/12/2022	Saturday, 8/13/2022	Sunday, 8/14/2022	Monday, 8/15/2022	Tuesday, 8/16/2022	Wednesday, 8/17/2022	Thursday, 8/18/2022	Friday, 8/12/2022
m.	NORTH	-	-	-	-	-	-	-	
		Working Hour Availability La	s for the Week	0 12/07/2016	2 0800-0800	-	-	-	
	SOUTH	Gender	Male			Discipline	PCA, HHA		
	mark and	Туре	Employee			Language	African, Alb	anian	
5	NEBRASKA	AWOI	Chic	INDIANA	DHIO PE	NNSYLVANIA Philadelphia	NerPork		

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.



Лар	Satellite				5	15		a series	2 Aver
	1	Friday, 8/12/2022	Saturday, 8/13/2022	Sunday, 8/14/2022	Monday, 8/15/2022	Tuesday. 8/16/2022	Wednesday, 8/17/2022	Thursday, 8/18/2022	Fridey, 8/12/2022
-	Winnig	-	- \$0800-0800	- #0800-0800	- \$0800-0800	-	-	-	
	2	Working Hou Availability (urs for the Week Last Updated	0 12/07/2016					
-	NORTH DAKOTA	Gender	Male			Discipline	PCA, HHA		
	5 . 3	Туре	Employee			Language	African, Alb	Janian	
	SOUTH	Phone	-			Location	KNOK DAL	E, PA, 15847	
		March Constant	er Derefile						

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.

List (74)	Map (74)				
Mapped Car	egivers (10) U	Inmapped Caregive	ers (64)		
Map S	Satellite	Jan S	Screnton	\mathcal{A}	Middletown Newburgh
3-5 72	Willamsport	Y WAY	rs Barre	~	7590
Lock Haven	e de la	221		\sum	
efone	Lewisburg	Haziet	ion Stroudsb	Fo-V	
Repr	Selinsprove	Premote	2537		New Ork
Lewistown			Bethlehem	0	P
	350	CONT.	Allentown	000	Edison

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.

Caregivers	В	ulk Actions 🔻
1.02.7003 Man (00)	Message All Cares	givers
roz (66) web (66)	Message Selected	Caregivers
Mapped Caregivers (80) Unmapped Caregivers (8) 0	Export	
Map Satellite Book Park Book Park	Island Collect Tast ELMondest Tests Dents Cocons Mensor Cocons Mensor Cocons	A CONT A CONT

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 **Avail-ability**, **Preferences**, **Search from Date**, and **Distance from Zip**. In addition, the **Available to Work** section also appears to enter specific availability.

Caregivers Caregiver General Availability Fi	ll a Specific Shift		
Search General Availability			
Office	Discipline	Status	
All	All	Active •	
- Advanced Filters			
Gender	Language	Date of Birth	SSN
All	All	mm/dd/yyyy	
Team	Branch	Location	Туре
All	All	All	Employee v
Street Address	City	State	Zip Distance From Zip
		All	
Availability	Preferences	Search from Date	
All	All	11/03/2021	
Available to Work			
Monday Tuesday	Wednesday	Thursday	Friday
			0 -: 0 -: 0
Live-In Live-I	n Live-In	Live-In	Live-In
Saturday Sunday			
Live-In Live-I	n		
Compliance	EVV Utilization		
All	Greater than 💌 %		
Search Reset			

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.



givers	S Caregiver G	eneral Availability	ll a Specific Shift							
arch	n General Ava	ilability								
:e			Discipline		Status					
			0.000						_	
ive	Caregivers A	vailability Over a	7-day Period						В	ulk Act
	_									
ist (9	Map (9)									
-1			0							_
Show	w availability informa	tion		gend: Start/end of a	a payroll week 🚔 Schedi	ıled visit 🗔 In Service	e 🌋 Absence 🛠 Prefe	ers to work these hours	Vight work these hour	5
Show	w availability informa Caregiver \$	tion Wednesday, 11/3/2021	Thursday, 11/4/2021	gend: Start/end of a	a payroll week 🗯 Sched Saturday, 11/6/2021	ıled visit 🛄 In Service Sunday, 11/7/2021	e 🕈 Absence 🛷 Prefe Monday, 11/8/2021	ers to work these hours Tuesday, 11/9/2021	Vight work these hours	s Acti
Show	w availability informa Caregiver + Amm I Will ①	tion Wednesday, 11/3/2021	Thursday, 11/4/2021	gend: Start/end of a Friday, 11/5/2021	a payroll week 蕾 Schedi Saturday, 11/6/2021 	ıled visit 🛄 In Servici Sunday, 11/7/2021 	e ∑ Absence	Tuesday, 11/9/2021	Might work these hour: Total Scheduled Hours	s Acti
Show	w availability informa Caregiver ¢ Amm I Will ① LI5-1333	tion Wednesday, 11/3/2021 \$≠0800-2000	1 Lee Thursday, 11/4/2021 \$∕0800-2000	gend: Start/end of a Friday, 11/5/2021 \$∕0800-2000	a payroll week	lled visit	e ∑ Absence	to work these hours Tuesday, 11/9/2021 	Might work these hours Total Scheduled Hours	s Acti
Show	w availability informa Caregiver C Amm I Will O LIS-1333 Singer D Adele O	tion Wednesday, 11/3/2021 \$*0800-2000 \$\$1300-1700	thursday, 11/4/2021	gend: Start/end of a Friday, 11/5/2021 \$0800-2000 @1300-1700	a payroll week	uled visit	 ► Absence ♥ Prefet Monday, 11/8/2021 - Ø0800-2000 	ers to work these hours Tuesday, 11/9/2021 	V Might work these hours Total Scheduled Hours 0 20:00	s Acti
Show	Arm I Will Caregiver Careg	tion Wednesday, 11/3/2021 ∳0800-2000 2000-2000 2000-2000 2000-0800	thursday, 11/4/2021	gend: Start/end of a Friday, 11/5/2021 \$0800-2000 \$1300-1700 \$0800-0800	x payroll week ☆ Schedd Saturday, 11/6/2021 ✓ 1200-1800 ॐ0800-0800	uled visit	Absence ♥ Prefet Monday, 11/8/2021 ♥ 0800-2000 1300-1700 ♥ 0800-0800	rs to work these hours Tuesday, 11/9/2021 → 0800-2000 → 1300-1700 → 0800-0800	Might work these hours Total Scheduled Hours 0 20:00	s Acti
Show	w availability informa Caregiver Amm I Will LIS-1333 Singer D Adele LIS-1334	tion Wednesday, 11/3/2021 ✓0800-2000 @1300-1700 ✓0800-0800 ✓ Live-In	thursday, 11/4/2021 \$0800-2000 \$1300-1700 \$0800-0800 \$Uee.in therein	gend: Start/end of a Friday, 11/5/2021 	x payroll week ☆ Schedd Saturday, 11/6/2021 ✓ 1200-1800 ジ0800-0800 ✓ Live-In	Iled visit ☐ In Service Sunday, 11/7/2021 ✓1200-1800 Ø800-0800 ✓ Live-In	Absence ♦ Prefet Monday, 11/8/2021 ♦ 0800-2000 월 1300-1700 ♥ 0800-0800 ♥ Use-in	to work these hours Tuesday, 11/9/2021	Might work these hours Total Scheduled Hours 0 20:00	s Acti
Shov	w availability informa Caregiver : Amm I Will 0 LIS-1333 Singer D Adele 0 LIS-1334 Boyd Patti 0 LIS-1345	tion wednesday, 11/3/2021 ♥0800-2000 20800-2000 20800-0800 ♥ Live-In 20800-1200		start/end of 2 Friday, 11/5/2021 → 20800-2000 \$ 0800-2000 \$ 0800-0800 \$ Uve±in \$ 0800-0200 \$ Uve±in \$ 0800-0200	payroll week ☆ Schedd Saturday, 11/6/2021	lled visit	Absence ♥ Prefe Monday, 11/8/2021 ♥ 0800-2000 Bi1300-1700 ♥ 0800-0800 ♥ Live-In Bi0800-1200	to work these hours Tuesday, 11/9/2021	Might work these hours Total Scheduled Hours 0 20:00 20:00	s Action
Shou	w availability informa Caregiver : Amm I Will 0 LIS-1333 Singer D Adele 0 LIS-1334 Boyd Patti 0 LIS-1345	Uon Wednesday, 11/3/2021 - ✓0800-2000 2000-0800 ✓0800-0800 ✓0800-1200 ✓0800-0800	Chursday, 11/4/2021 Common	Start/end of z Friday, 11/5/2021 - - - - - - - - - - - - -	payroll week 중 Schedi Saturday, 11/6/2021	iled visit ☐ In Service Sunday, 11/7/2021	Absence ♥ Prefs Monday, 11/8/2021 ♥0800-2000 1300-1700 ♥0800-0800 ↓Live-In 100800-1200 ♥0800-0800 ↓Live-In	ers to work these hours Tuesday, 11/9/2021	V Might work these hours Total Scheduled Hours 0 20:00 20:00	s Actio

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 <i>Start/End of Week</i> , <i>Scheduled Visits</i> , <i>In Service</i> , <i>Absence</i> , <i>Prefers to Work</i> , and <i>Might Work</i> .
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 inform- ation (as seen in the image below).
		View Caregiver Profile Assign to Shift Caregiver Information



	Component	Description
		View Caregiver Profile or Assign to Shift options are available at the bot- tom of the window.
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. Hover- ing over the note icon displays a tool tip with the note text.

An **Availability Last Updated** (sortable) column has been added to the *Caregiver General Availability* and *Fill a Specific Shift* pages, as seen in the following image.

	Legend: these he	Start/end ours	of a payroll we	ek 🏛 Schedu	led visit 🗔 Iı	n Service 🗓 A	lbsence 🞸 Pr	efers to work t	these hours 🗸 M	light work
Caregiver ¢	Wednesday, 5/11/2022	Thursday, 5/12/2022	Friday, 5/13/2022	Saturday, 5/14/2022	Sunday, 5/15/2022	Monday, 5/16/2022	Tuesday, 5/17/2022	Total Scheduled Hours	Availability Last Updated 🗸	Actions
Pacino Al								0	03/24/2022	
QUE-1008				✓ Live-In	ॐ 0800- 2000	ॐ 1000- 1200				
Sheeran Ed								0	03/24/2022	
MIA-1016	ॐ 0800-0800	ॐ 0800- 0800 ॐ Live-In	ॐ 0800- 0800							
Burruss Kandi	20215-0230							01:15	03/21/2022	
 MIA-1018		\$ 0800- 2300	ॐ 0800- 0900	✓0800- 2200	ॐ 0000- 0100	⊘ 0800- 2300	ॐ 0800- 2300	ا		

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



	caregiver code	Office	Address
mm I Will	LIS-1333	Lisset's Office	1234 Brickell Avenue MIAMI, FL, 33132
amer Miriam	LIS-1599	Lisset's Office	
Previous 1 Next »			1 - 2 of 2

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.

l
l

Expand to Edit Availability

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

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Select *	Select *	Select +	Select *	Select *	Might Work *	Preferred
P						0900 - 200
Live-In	Live-In	Uve-In	Uve-In	Live-In	🛃 Live-In	Uve-In

Expand another Caregiver to edit availability.



dit Availabil	ity					>
+ Pacino Al [Co	ode: QUE-1008]					
Negron Luisa	Code: QUE-1010	1				
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Preferred +	Preferred *	Preferred *	Select *	Preferred *	Preferred *	Preferred *
0800 - 0800	0800 - 0800	0800 - 0800	0000 - 0000	0800 - 0800	0800 - 0800	0800 - 0800

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.

Edit Availability	Availability upplated successfully.	
Pacino Al [Code: QUE-1008]		

Availability Updated Successfully



Bulk Action Export

An *Export* option has been added to the *Bulk Actions* button (as seen in the following image) to generate an Excel report of the Search Results.

Caregiv	ers							Bulk Actions 🔻
List (437	6) Map (4376)						Send Messag	je
	()						Export	
	Carogiuar *	Dissipling(s) *		Rhone *	Email A	Contact Nothed	Status A	Actions
		Discipline(s) ÷	Address +	Fhone -	Email +		Status +	Actions
		RN, OT	ALC: NAME OF				Active	

Bulk Actions: Export

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

6	- ∽•¢ آ						SearchCaregivers.c	sv - Excel
F	ile Home Insert	Page Layout	Formulas Dat	a Review Vie	ew ♀ Tell me wh	at you want to do		
	Cut	Calibri 🔹 11	• A A =	≝ ≡ ≫∗	🚏 Wrap Text	General	•	Normal
Pas •	te 🎸 Format Painter	B I <u>U</u> -	<u></u> • <u>A</u> • ≡	≡ ≡ € €	📑 Merge & Center	- 9 - % • 50	Conditional Formatting *	Format as Table •
	Clipboard 🕫	Font	G	Alignm	ient	5 Number	r ₂	
C1	• I X	√ fx	Discipline					
	A	В	C	D	E	F	G	H I
1	Caregiver	Caregiver Code	Discipline	Address	Phone	Email	Contact-Method	Status
2	Shah PCACG6	500-2064	PCA	NEW YORK, NY, 1	0001			Active
3	Shah Mosam	HHA-2094	RN, LPN, PT	ALAMO, TN, 3800	1			Active
4	Johnson Aaron	Nik-2153	PCA, HHA	ALAMO, TN, 3800	1			Active
5	Johnson Aaron	Nik-2162	RN, LPN	ALAMO, TN, 3800	1			Active
6	Johnson Aaron	Nik-2187	PCA, HHA	ALAMO, TN, 3800	1			Active
7	Shah Prushthi	EXQ-2253	PCA, HHA	Address Steet 1 N	EW YORK, NY, 100	010		Active
8	fø ^{ll f} g e ^{nl} g	FXQ- 257	PCAHMA	65154				A tive
26	flower andy	HHA-121δ	PLA	NEW YORK, NY, 1	0001			Active
29	SkilledCG 66455	EXQ-1249	RN, LPN, Other	Church Street 1st	972-511-1222	ecanarys.suma@ex	Email	Active
30	NonSkilledCG 66456	EXQ-1254	PCA, HHA, Othe	CHURCH STREET	972-511-1222	ecanarys.suma@ex	Email	Active
-	> SearchCare	givers (+)						

Caregiver Search: Export File



Fill a Specific Shift

Tip: You can press Ctrl-F on your keyboard to search this topic.

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 <u>+Advanced Filters</u> 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.

Caregivers Caregiver General Available Nill & Specific Shift			
Search to Fill a Specific Shift @			
Office	Patient *	Date *	Sub -
0fter +	Trainor Will (US-7897854854321417) x	16/26/2622	0800-1300 (HSK): Temp Temp +
	Error patient name		
 Advanced Fitters 			
Available to Work			
Monday Turniay	Windnesday	Thursday	Briday
	0 0	0 0 00.00 AM 0 01.00 PM	0 0 0
Uveln Uveln	Usets	Useh	Uvelh
Interior Index			
	0 -: 0		
Contraction of the second seco			
U web U web			
ham	branch	Location	Discipline
Al .	Al .	Al •	HSK .
for the		Annual Rest.	
A	A		
•			
freiner r	Active .	At	() selected)
Street Address	City	State	Dep
as nex reperts	and and a second s		M-W
Distance Fram Address	Talerance Window O		Compliance
	Minutes before inst Start	Include Unscheduled Caregivers	Al
Payrul Restrictions	EV/ Utiliaritien		
Seen Option(3)	Greater than +		
		Worked with Papers	
Search Reset			

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.

will		×
Trainor Will (LIS-78976	654654321417)	

Auto-Suggest Patient Field





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

D	ate *							
ŀ	11/08	/2021						
	NO\	/ 2021	Ŧ			<	>	
	s	М	т	W	Т	F	s	
	NO	/						
		1	2	3	4	5	6	
	7	8	9	10	11	12	13	
	14	15	16	17	18	19	20	
	21	22	23	24	25	26	27	
L	28	29	30					

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 *					
1000-1400 (HSK): Temp Temp					
Select					
1000-1400 (HSK): Temp Temp					

Shift Field

Assigning a Caregiver

On the *Search Results*, click on the <u>Caregiver Name</u> (link) to access a quick-view popup 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).

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Show	availability info	ormation	
	Caregiver ‡	Distance 💠	Monday, 1
	Chio Teresa	6.70	
	Chio Tere	esa	30
	Code	LIS-1600	
	Status	Active	
	r v		
	Language	English, Spanish, Mandarin	
	Discipline	PCA, HHA, HSK, HN	IK, PA
	Last Date Worked	05/30/2019	
	View Caregivi Assign to Shit	er Profile f <mark>t</mark>	

Assign Caregiver to Shift

Schedule	Visit Info	Bill Info	1	Verification		
Schedule:						<u>History</u>
* Sche	dule Time: 1000 - 1400	Temporary		Caregiver Code	LIS-1600 ? Chio Teresa	Temporary
	POC:Select	*		Assignment II * Pay Code	: 100600	
* Prim	ary bill to: Amazing Health	~	<u>History</u>	Secondary bill t	o:Select 🗸 🤇	History
* Ser	rvice Code: HSK Hrly_ANT	~		Service Cod	e:Select 🗸	
	* H: 04 M: 00				H:M:	

Visit Schedule Tab: Caregiver Assigned to Shift

A **Worked with Patient** checkbox is available under the <u>Advanced Filters</u> 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).

· · · · · · · · · · · · · · · · · · ·	·		
Street Address	City	State	Zip Distance From Address
28 West Flagler St	MIAMI	FL *	33130
Compliance	Payroll Restrictions	EVV Utilization	
All	Select Option(s) 🔹	Greater than 🔻 %	Vorked with Patient
Search Reset			
***********		***********	

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.



					Enterpris	e 21.03.01 HHAWIPOO	52 (Chrome/89.0	.4389	9.82) chro	me 89 (Doc C	hrome 89) 3,	/12 14
	To Date	: 03/21/2021	1		Office(s): All	Ŧ		D	isci	pline:	All		•
	Patient First Name	:		Adı	nission ID:				Con	tract:	All	-	•
•	Patient Team	: All	•	Patien	t Location: All	٣	Patient Branch:			All		•	
	Caregiver First Name:			Caregiver Code:			A	Assignment ID:					
•	Caregiver Location	: All	•	Caregiv	er Branch: All	۲		Ti	me	sheet:	All		•
	Paid	: All 🗸		Search Open	Schedules: 🗌								
Call In : 0	Total Call Out : 0		Search								Page Lo	ided in 20.55 Page	i9 seco e 1 of
tient Name	Caregiver Code	Caregiver Name	Assignment ID	Office	Visit Date 👻	Schedule	Visit	<u>I</u>	<u>D</u>	Billed	P Contract	Discipline	
04 Discharge	2323	1114 34 Production	002323	Excellence QA Team	03/21/2021	0200-0300		N P	v	N	N Discount Contract H	нна	省 🗞
04 Discharge	2323	1114 34 Production	002323	Excellence QA Team	03/20/2021	0200-0300		N P	V	N	N Discount Contract H	нна	🚰 🙉
Y Prebilling A	2323	1114 34 Production	002323	Excellence QA Team	03/19/2021	2200-2300		N I	N	N	N Krunal_LIC	нна	省 🙉
04 Discharge	2323	1114 34 Production	002323	Excellence QA Team	03/19/2021	0530-0545		N P	V	N	N Private Qui	ck Broadcast ching Caregi	vers
04 Discharge	2323	1114 34 Production	002323	Excellence QA Team	03/19/2021	0200-0300		N P	N	N	N Discount Contract H	HHA	4 🔍
04 Discharge	2323	1114 34 Production	002323	Excellence QA Team	03/18/2021	0200-0300		N P	N	N	N Discount	нна	省 🙉

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.

ill a Specific Shift				
earch to Fill a Specific	Shift			
office	Patient *	Date *	Shift *	
All	▼ Trainor Will (LIS-7897654654321	417) × 11/08/2021	1000-1400 (HSK): Temp Temp	v
	Enter patient name			
Advanced Filters	Enter patient name			
Search Reset				

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 have been added to 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 over- time 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.



IHA Exchange - Caregiver Pay Code	×
Caregiver Pay Code	History
* Discipline: HHA 🗸	
* Payroll Configuration: Default Payroll Setup 🗸 🕻	
* Pay Code: HHA Holiday (1	
Default Visit Rate: 🗹 🚺	
Default Travel Time Rate: 🗹 🚺	
Default Off Duty Time Rate: 🗹 🚺	
Default In-Service Rate: 🗹 👔	
Exclude from Overtime: 🔤 🚺	
Default Mileage Rate: 🗹 👔	
Status: Active	
Save Cancel	

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*.

F	Payroll Restrictions								
[Select Option(s)								
	Filter								
	🗆 40 Hour OT								
	🗌 7 Day OT								
ſ	Spread of Hours								
U									

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 End***ing Day* configurations for an office) can be seen in the search results for visibility when assigning a shift (as illustrated in the following image).

	Legend:	Start/end of a page	<mark>yroll week</mark> 🛗 Schedu	led visit 🗔 In Service	e 🖺 Absence 🞸 P	refers to work these	hours 🗸 Might wo	ork these hours
Caregiver 😄	Monday, 10/11/2021	Tuesday, 10/12/2021	Wednesday, 10/13/2021	Thursday, 10/14/2021	Friday, 10/15/2021	Saturday, 10/16/2021	Sunday, 10/17/2021	Total Scheo Hours
Pacino Al	-	-						0
QUE-1008					-	🗸 Live-In	\$0800-2000	
Negron Luisa 🜖								0
QUE-1010	₩0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	
Cass Tony 🕚								0
QUE-1011	\$0800-0800	\$0800-0800	\$ 0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	\$0800-0800	



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.

Caregiver Search				Collapse 🛛
○ Caregiver Search ○ Availability Search ● Fill	a Shift			
Office(s)*	Team	Branch	Location	
Excellence QA Team 🗸	All	✓ All	✓ All	~
Patient*	Date*	Shift*		
raj98 raj98 (EXQ-9000205985385306) ×	01/22/2021	0100-2300 (PCA): Pandey Mahes	v	
Discipline	Language	Туре	Status	
All	Albanian	✓ All	✓ Active	~
Gender	State	City	Zip	Distance from Zip (Miles)
All	All	·		
			From Patient Address:	PLEASANTON, CA, 94566
Availability	Preferences			
All	All	~		
Daily Availability				
Monday Tuesday -	Wednesday - Thursday	- Friday 0100 - 2300 Saturda	y - Sunday -]
Live-In	Live-In	Live-In Live-	-In Live-In	
+ Advanced Filters				
		Search		
List View Map view				Bulk Actions
Search Results (4)				Page 1 of 1
Caregiver Caregiver Code Availability	Distance 1/8/2021 (Friday)	1/9/2021 1/10/2021 1/11/202 (Saturday) (Sunday) (Monday)	1 1/12/2021 1/13/2021 (Tuesday) (Wednesday)	1/14/2021 Total (Thursday)
ntab EXQ-1081	N/A 0700-1200	0700-1200 0700-1200	Activa	ite Windows 15:00
John Johnson Jo				ettings to activate Windows.

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).

The Enterprise System



show	availability informat	ion		Legend: 🛛 Start/end of a payroll week 🏙 Scheduled visit 🗔 In Service 💲 Absence 🎺 Prefers to work these hours 🛩 Might work these hours						
	Caregiver ‡	Distance ≑	Monday, 11/8/2021	Tuesday, 11/9/2021	Wednesday, 11/10/2021	Thursday, 11/11/2021	Friday, 11/12/2021	Saturday, 11/13/2021	Sunday, 11/14/2021	Total Scheduled Hou
	Chio Teresa 🚯	6.70		i 1000-1400	1 000-1400	i 1000-1400	i 1000-1400			16:00
	LIS-1600		ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	-	-	
	Lafleur Bianca 🚯	6.80								0
	LIS-1350		ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	ॐ 0800-0800 ॐ Live-In	

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 (by selecting the header checkbox) 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 Selected Caregivers*.

To message all Caregivers on the Search Results (across all pages), click on the **Bulk Actions** button (located on the top-right section of the Search Results) and select *Message All Caregivers*.

Caregivers	Мар (10)							Bulk Actions Message All Caregivers Message Selected Caregivers Export
≤	Caregiver =	Discipline(s) 0	Address 0	Phone =	Email +	Contact Method =	Status =	Actions
	Amm I Will US-1333	PCA, HHA	1234 Brickell Avenue MIAMI, FL, 33132	305-498-0989	william@caregiver.net	Mobile/Text	Active	
	Singer D Adele LIS-1334	PCA, HHA, HSK	789 Miracle Mile MIAMI, FL, 33134	305-222-4444	adeledsinger@givescare.com		Active	
	Boyd Patti US-1345	PCA, HHA, HSK	987 Cavern Road MGAML FL, 33165	305-555-7777	pattib@caregiver.net		Active	
	Mark E Mark US-1349	PCA, HHA, HSK	MIAMI, FL, 33134	305-789-9879			Active	
	Lafleur Blanca US-1350	PCA, HHA, HSK, HMK	1600 Giralda Street MIAMI, FL,	305-555-3333			Active	

Sending a Message to All Caregivers via Caregiver Search

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

Caregiver:	aregivers List (10) Map (10)							
	Caregiver +	Discipline(s) 0	Address =	Phone #	Email 9	Contact Method +	Status 0	Actions
	Amm I Will US-1303	PCA, HHA	1234 Brickell Avenue MIAMI, FL, 33132	305-498-0989	william@caregiver.net	Mobile/Text	Active	-
	Singer D Adele LIS-1334	PCA, HHA, HSK	789 Miracle Mile MIAMI, FL, 33134	305-222-4444	adeledsinger@givescare.com	-	Active	-
×	Boyd Patti LIS-1346	PCA, HHA, HSK	987 Cavern Road MEAML FL, 33165	305-555-7777	pattib@caregiver.net	-	Active	-
	Mark F Mark	PCA. HHA. HSK	MIAML FL 33134	305-789-9879			(Arrive)	

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**.

Send Message All fields marked with an asterisk (*) are required.	×
Delivery Method * Delivery Time Test * O Now O Schedule	
Recipients Ann 1 Will Singer D Adele Boyd Pami Mark I Mark Lafleur Bianca Karring Imma Kramer Miriam. Okia Teresa Vez Verenica Dunne Michael	
Subject	
Enter Subject Here	
Script	
Select Script Options	٠
Message ()*	
Enter message here	
Printy ● High ○ Medium ○ Low	
Broadcast	

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.

Send Message		×
All fields marked with an asterisk (*) an	required.	
Delivery Method *	Delivery Time	
Email *	O Now Schedule	
Recipients		
Singer D Adele Boyd Patti		
Subject *		
Subject is Required		
Script		
Select Script Options		
Message *		
Enter message here		
Priority	Attachment o	
High () Medium () Low	 Select rise 	
BCC .		
Blind Carbon Copy		
	Broadcast	

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.

Delivery Method * Mobile Messaging •	Delivery Time Now Schedule	
Recipients		
Amm I Will Singer D Adele Boyd Patti	Mark E Mark Lafleur Bianca Karring Imma Kramer Miriam	
Subject		
icript		
Select Script Options		٣
Message *		
Broadcast Note - Mobile Text Message		
Priority		
🗅 Hiah 🔿 Medium 🔿 Low		

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.

Delivery Method * Mobile and Text		Now	Schedule			
Recipients						
Amm I Will Singer D Adele	Boyd Patti	Mark E Mark	Lafleur Bianca	Karring Imma	Kramer Miriam	
Subject						
Script						
Select Script Options						*
Message *						
Broadcast Note - Mobile and	Text Messag	e				
Priority						
🔾 High 🔾 Medium 🔾	Low					

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.



Caregive	rs		 Your message is being broadcast. To review the details of the broadcast, please navigate to the Communication
Caregivers	Caregiver General Availability	Fill a Specific Shift	History page under the Action menu.
Search Ca	aregivers		\$
Office		Status	

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 <u>Action</u> link (as seen in the image below).

Caregiver Comm	unications History								Enterprise 21.1.1 AWSP	RODWEBO8 Chrome 95 (Doc	Chrome 95) 11/04 12:1
Communic	ations Search										
Office(s)			Communication Type			Status			Subject		
All		×	All	•		All		Ŧ			
Created Fro	m		Created To			Scheduled From			Scheduled To		
10/04/202	L		11/04/2021			10/04/2021		i	11/04/2021		
					Se	arch					
Search Result	s (1)										
ID	Subject		Created	Created By	Schedule	ed ▼	Broadcast Inititated	Broa	dcast Completed	Dentur	Action
42551215	Availability for Saturdays		11/04/2021	LissetV	11/04/2021	L 12:07 PM				Cancel Broadcast	Action
										_	

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				
Broadcast History					
	ID: 42551215	Subject:	Availability for Saturdays	Sche	duled Date: 11/04/2021 12:07 PM
Sta	atus: Delivered	Created By:	LissetV	Cr	eated Date: 11/04/2021 12:07 PM
Broadcast Intia	Broadcast Intiated: 11/04/2021 12:43 PM		Broadcast Completed: 11/04/2021 12:44 PM		
Broadcast History Details	5				
Delivered Not Delivered Search Results (8)					
Caregiver Name	Message Type	Phone/ID	Email	Status	Broadcast Time-
Amm, Will	Text	3054980989		Delivered	11/04/2021 12:44:05 PM
Singer, Adele	Text	3052224444		Delivered	11/04/2021 12:44:05 PM
Boyd. Patti	Text	3055557777		Delivered	11/04/2021 12:44:05 PM
Mark, Mark					
Lafleur, Bianca	Text	3057899879		Delivered	11/04/2021 12:44:05 PM
	Text Text	3057899879 3055553333		Delivered Delivered	11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM
Karring, Imma	Text Text Text	3057899879 3055553333 3053053053		Delivered Delivered Delivered	11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM
Karring, Imma Chio, Teresa	Text Text Text Text	3057899879 3055553333 3053053053 7867867866		Delivered Delivered Delivered Delivered	11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM 11/04/2021 12:44:05 PM

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 Hist	ory Detail		
Broadcast History			
ID: 42551215		Subject: Availability for Sature	days Scheduled Date: 11/04/2021 12:07 PM
Status: Pending		Created By: LissetV	Created Date: 11/04/2021 12:07 PM
Broadcast Intiated:	Broadca	st Completed:	
Broadcast History Details Delivered Not Delivered			
Search Results (1)			
Caregiver Name	Message Type	Status	Reason
Kramer, Miriam	Text	Failed	NotificationTextNumber is not configured

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.

erence Table M	anagement					
Search						
Reference Table	Caregiver Communica	search				Lege
Search Resu	lts (15)					Add Page 1 of 1
ID .	Type	Description	Offices	Created Date	Status	Edit
3379	Text	hello	Westchester(Excellence QA Team, HHAeXchange Office, PCA Exchange Office)	03/11/2016	Active	Edit
3404	Email	1	Westchester(PCA Exchange Office)	04/25/2016	Active	Elth.
3405	Text	offfice related issue	Westchester(PCA Exchange Office)	04/26/2016	Active	2
3406	Voice	CVXVXVC	Westchester(HHAeXchange Office, PCA Exchange Office, Excellence QA Team)	04/26/2016	Active	Edit
3407	Email	XCVXCVXCVXCV	Westchester(HHAeXchange Office, PCA Exchange Office, Excellence QA Team)	04/26/2016	Active	Edit
3409	Text	This is test script	Westchester(Excellence QA Team)	04/27/2016	Active	Edit
3422	Text	hi ssp1	Westchester(Excellence QA Team, HHAeXchange Office, PCA Exchange Office)	05/11/2016	Active	Edit
3434	Text	Hi SSP	Westchester(Excellence QA Team, HHAeXchange Office, PCA Exchange Office)	06/24/2016	Active	Edit
3435	Text	hi	Westchester(HHAeXchange Office, Excellence QA Team, PCA Exchange Office)	07/06/2016	Inactive	Edit
3436	Text	hi	Westchester(HHAeXchange Office, Excellence QA Team, PCA Exchange Office)	07/06/2016	Active	Edit
3463	Email	Just for Test	Westchester(Excellence QA Team)	09/14/2016	Active	Edit

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 <u>Edit</u> 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 *Text* **Type** is selected, then the **Description** and **Text** fields are required.

HHAeXchange - Edit Comm	unication Script Type	×
Communication Script T	уре	
* Type:	Text 🗸	
* Description:	New Script Test Template for Text	
• Text:	Hi, this is a test for text messaging.	
Office:	Select •	
* Status:	Active 🗸	
	Save Cancel	

Text 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.

× ⊦	HAeXch	lange	Home Patie	ent Care	giver Visit	Action	Billing	Dashboard	Admin			Notification	Message	s ToDo's	Open Cases	Su	pport Center Sic Welcome - Mult	<u>gn Out</u> iRK ()
Care	giver Comn	nunications History											Er	terprise 20	.1.1 TELXDEVD			24 EST
	Communic	ations Search																
	Office(s)				Communie	ation Type	2				Status			Subje	:t			
	All		~		All				~		All		~					
	Created Fro	m			Created T	•					Scheduled From			Sched	uled To			
	mm/dd/yy	уу			mm/dd/	уууу					mm/dd/yyyy	1		mm/	dd/yyyy		i	
										Se	arch							
Se	arch Results	; (249)														Page 1	of 125 <u>Next</u> La	<u>st</u>
1	ID	Subject				Created		Created B	y	Schedu	led 🕶	Broadcast Inititate	I	Broadcas	t Complete	d Status	Action	
1	141649	eqw				10/08/20	020	shekhussp		10/15/2	020 12:00 AM					Pending	Action	
:	141648	qwe				10/08/20	20	shekhussp		10/08/2	020 11:35 AM					Pending	Action	

Caregiver Communication History Search

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

Select the <u>Action</u> 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 <u>Pending</u> and <u>In Progress</u> broadcasts. *Print* becomes available for <u>Delivered</u>, <u>Failed</u>, and <u>Cancelled</u> 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.





outcust mistory Det					
Broadcast History					
ID: 14	1616	Subj	ect: 09/10 - Message from Cone	Schedul	ed Date: 09/10/2020 03:24 AM
Status: De	elivered	Created	By: shekhussp	Creat	ed Date: 09/10/2020 03:23 AM
Broadcast Intiated: 09 Broadcast History Detai	/10/2020 03:24 AM	Broadcast Comple	ed: 09/10/2020 03:25 AM		
Broadcast Intiated: 09 Broadcast History Detai Search Results (3)	/10/2020 03:24 AM	Broadcast Comple	ed: 09/10/2020 03:25 AM		Page 1 of 2 <u>Next</u> Last
Broadcast Intiated: 09 Broadcast History Detai Search Results (3) Caregiver Name	/10/2020 03:24 AM	Broadcast Complet	ed: 09/10/2020 03:25 AM	Status	Page 1 of 2 <u>Next_Last</u> Broadcast Time≁
Broadcast Intiated: 09 Broadcast History Detail Search Results (3) Caregiver Name 103, Production updated	V10/2020 03:24 AM Message Type Mobile/Text	Phone 9510094312	ed: 09/10/2020 03:25 AM	Status Delivered	Page 1 of 2 <u>Next_Last</u> Broadcast Time▲ 09/10/2020 03:25:13 AM

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 popup appears. Click *YES* to cancel the 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 > Provider 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 <u>Active</u>, 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

	0900-0900 Live-1	ln 0800-0900	090
(i) Default Max Visits Availability:	s	aturday	Sunday
		5	5
Quick Broadcast Criteria			
Quick Broadcast Criteria:	Select	•	
Quick Broadcast Criteria For EVV Utilization	w:		٩
Call Exception Notification setup (Faile	d Vei 🗌 [Select	all] g Secondary Office	or to s
	Matchin	g Primary Language	
Alert email (weekda	ys): Matchin Caregiv	ig Scheduling Preferen ers who have worked	ces with Patient
Alert email (weeken	ds): Exclude	Overtime Caregivers	
Week	day:	Non-Compliant Careg	ivers

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	
Quick Broadcast ^C riteria:	Matching Primary Lang V
Quick Broadcast Criteria For EVV Utilization	on %: 40 1
Call Excention Notification setun (Fail	ed Verification. Missed Visits and Clock-in prior t

Quick Broadcast Criteria: EVV Utilization Field



EVV Utilization Tracking

Caregiver Search: EVV Utilization

Use the **EVV Utilization** filter field under the <u>Advanced Filters</u> 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.

Search Caregivers				
Office		Status		
All	•	Active	•	
 Advanced Filters 				
eam		Branch		Location
All	•	All	•	All
iender		Language		Date of Birth
All	•	All	•	mm/dd/yyyy
уре		Caregiver		State
All	•		x	All
ompliance		EVV Utilization		
	_]	Lors than T 40	04	

EVV Utilization Search: Greater or Less Dropdown Field

Caregiver EVV Utilization on Caregiver Profile

On the Caregiver's Profile page (*Caregiver* > *Search Caregiver*), a new field titled EVV Utilization has been added 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.

The Enterprise System



Demographics	
* First Name: NonSkilled	Middle Name:
* Last Name: ROY	* Initials: NR
in the second se	المحاجية الم
HHA/PCA Registry Number:	Added/Checked Registry Date:
HHA/PCA Registry Number: Professional License Number:	Added/Checked Registry Date: NPI Number:
HHA/PCA Registry Number: Professional License Number: Referral Source: Agency	م عد له عن مد بد بد م Added/Checked Registry Date: NPI Number: Referral Person:
HHA/PCA Registry Number: Professional License Number: Referral Source: Agency NYC Registry checks:	Added/Checked Registry Date: NPI Number: Referral Person: Signed Payroll Agreement: No Date: 1

Caregiver Profile: EVV Utilization (Percentage Count) Field



Scheduled Today Field

A **Scheduled Today** search checkbox field has been added 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.

npliance		EVV Util	ization		_			
		▼ Greater	r than 🔻	%	Scheduled Too	lay		
earch	Reset							
rogive	are a							
regive	15							Bulk Action
List (2)	Map (2)							
List (2)	Map (2)							
List (2)	Map (2) Caregiver \$	Discipline(s) ‡	Address ÷	Phone ¢	Email \$	Contact Method 🗢	Status ‡	Actions
List (2)	Map (2) Caregiver ÷	Discipline(s) \$	Address ¢ Street NEW YORK, NY, 10010	Phone ¢	Email \$	Contact Method ÷	Status ¢	Actions
List (2)	Map (2)	Discipline(s) + HHA PCA	Address ÷ Street NEW YORK, NV, 10010 ARLINGTON, VA, 22222	Phone ¢	Email ÷ 	Contact Method 🗢	Status ¢ Active Active	Actions

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.

	*	EVV Utilization	•	96 🗹 SC	heduled Today			
			1					
arch Reset								
ive Caregivers	Availability	Over a 7-day	y Period					Bulk Action
2								
.ist (2) Map (2)								
List (2) Map (2)								
ist (2) Map (2) Show availability info	rmation							
ist (2) Map (2) Show availability info	rmation Legend:	Start/end of a pay	yroli week 🏥 Sch	eduled visit 🖵 In	Service I Absenc	e 🎸 Prefers to we	ork these hours 🗸	Vight work these hour
ist (2) Map (2) Show availability info	rmation Legend: Thursday, 12/30/2021	Start/end of a pay Friday, 12/31/2021	/roll week 首 Sch Saturday, 1/1/2022	eduled visit 🖵 In Sunday, 1/2/2022	Service 잘 Absenc Monday, 1/3/2022	e ダ Prefers to wo Tuesday, 1/4/2022	ork these hours 🗸 Mednesday, 1/5/2022	vlight work these hou Total Scheduled Hours
ist (2) Map (2) Show availability info Caregiver \$	rmation Legend: Thursday, 12/30/2021 @0445-0645	Start/end of a pay Friday, 12/31/2021	yroll week 音 Sch Saturday, 1/1/2022 	eduled visit 🗔 In Sunday, 1/2/2022	Service T Absenc Monday, 1/3/2022	e ॐ Prefers to wo Tuesday, 1/4/2022	ork these hours Vednesday, 1/5/2022	vlight work these hou Total Scheduled Hours 08:00
ist (2) Map (2) Show availability info Caregiver	Thursday, 12/30/2021 #i0445-0645	Start/end of a pay Friday, 12/31/2021	rroll week ∰ Sch Saturday, 1/1/2022 	eduled visit 및 In Sunday, 1/2/2022 	Service ∑ Absenc Monday, 1/3/2022 	e ∳ Prefers to wo Tuesday, 1/4/2022 	vrk these hours ✓ M Wednesday, 1/5/2022	vlight work these hou Total Scheduled Hours 08:00
List (2) Map (2) Show availability info	rmation Legend: Thursday, 12/30/2021 Bit0445-0645 Bit0200-0400	Start/end of a pay Friday, 12/31/2021 800200-0400	rroll week 🏙 Sch Saturday, 1//2022 	eduled visit In Sunday, 1/2/2022 & Live-In 	Service ∑ Absenc Monday, 1/3/2022 	e ∳ Prefers to wo Tuesday, 1/4/2022 	vrk these hours ↓ ✓ N Wednesday, 1/5/2022 	Alight work these hour Total Scheduled Hours 08:00 07:00

Caregiver General Availability Page: Scheduled Today