



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 Customer 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 HHS. The Payer is the organization placing Patients with Providers.
HHAX	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.

The screenshot shows the 'Caregivers' search interface. At the top, there are three tabs: 'Caregivers' (highlighted with a red circle), 'Caregiver General Availability', and 'Fill a Specific Shift'. Below the tabs is the 'Search Caregivers' section. It contains several filter fields: 'Office' (dropdown menu), 'Status' (dropdown menu), 'Advanced Filters' (link), 'Team' (dropdown menu), 'Branch' (dropdown menu), 'Location' (dropdown menu), 'Discipline' (dropdown menu), 'Gender' (dropdown menu), 'Language' (dropdown menu), 'Date of Birth' (text input with 'mm/dd/yyyy' placeholder), 'SSN' (text input), 'Type' (dropdown menu), 'Caregiver' (text input with a clear 'x' button), 'State' (dropdown menu), 'City' (text input), 'Zip' (text input), 'Compliance' (dropdown menu), and 'EVV Utilization' (dropdown menu with 'Greater than' and a percentage input field). At the bottom left, there are 'Search' and 'Reset' buttons.

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.

The screenshot shows a search input field labeled 'Caregiver' containing the text 'LIS'. A dropdown menu is open below the input field, displaying a list of suggestions. Each suggestion includes a name and a code in parentheses: 'Amm Will (LIS-1333,100333)', 'Boyd Patti (LIS-1345,100345)', 'Chio Teresa (LIS-1600,100600)', 'Karring Imma (LIS-1356,100356)', and 'Kramer Miriam (LIS-1599,100599)'. The dropdown menu has a scrollbar on the right side.

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).

Caregivers Bulk Actions ▾

List (9) Map (9)

<input type="checkbox"/>	Caregiver ▾	Discipline(s) ▾	Address ▾	Phone ▾	Email ▾	Contact Method ▾	Status ▾	Actions
<input type="checkbox"/>	Amm I Will LIS-1333	PCA, HHA	1234 Brickell Avenue MIAMI, FL, 33132	305-498-0989	william@caregiver.net	Mobile/Text	Active	⋮
<input type="checkbox"/>	Singer D Adele LIS-1334	PCA, HHA, HSK	789 Miracle Mile MIAMI, FL, 33134	305-222-4444	adeledsinger@givescare.com	..	Active	⋮
<input type="checkbox"/>	Boyd Patti LIS-1345	PCA, HHA, HSK	987 Cavern Road MIAMI, FL, 33165	305-555-7777	pattib@caregiver.net	..	Active	⋮
<input type="checkbox"/>	Mark E Mark LIS-1349	PCA, HHA, HSK	MIAMI, FL, 33134	305-789-9879	..	..	Active	⋮
<input type="checkbox"/>	Laffeur Bianca LIS-1350	PCA, HHA, HSK, HMK	1600 Giralda Street MIAMI, FL, 33134	305-555-3333	..	..	Active	⋮
<input type="checkbox"/>	Karring Imma LIS-1356	PCA, HHA, HSK, PA, HMK	123 Caring Road MIAMI, FL, 33134	305-305-3053	..	..	Active	⋮
<input type="checkbox"/>	Kramer Miriam LIS-1599	HHA	..	..	..	..	Active	⋮
<input type="checkbox"/>	Chio Teresa LIS-1600	PCA, HHA, HSK, PA, HMK	123 Salzedo Drive MIAMI, FL, 33143	786-786-7866	..	Mobile/Text	Active	⋮
<input type="checkbox"/>	Vee Veronica LIS-1601	PCA, HHA, HSK, PA, HMK	888 Brickell Bay MIAMI, FL, 33133	786-888-8888	..	Mobile/Text	Active	⋮

< Previous **1** Next > 1 - 9 of 9

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 Caregivers (10) Unmapped Caregivers (11)

Map Satellite

Test Caregiver Int Test Caregiver Int EXQ-1473

Availability

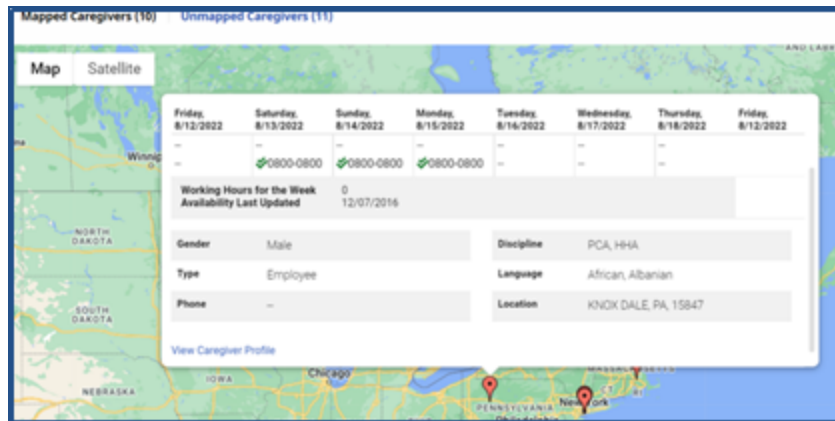
Friday, 8/12/2022	Saturday, 8/13/2022	Sunday, 8/14/2022	Monday, 8/15/2022	Tuesday, 8/16/2022	Wednesday, 8/17/2022	Thursday, 8/18/2022	Friday, 8/12/2022
..	✓0800-0800	✓0800-0800	✓0800-0800	..	..	..	..

Working Hours for the Week 0
Availability Last Updated 12/07/2016

Gender Male Discipline PCA, HHA
Type Employee Language African, Albanian

Caregiver Availability Window

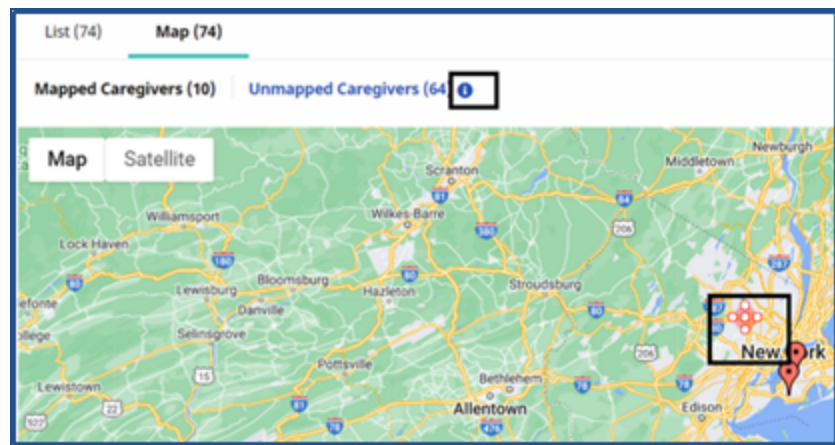
Scroll using the slide bar on the right. Click on the **View Caregiver Profile** link (at the bottom of the window) to route to the profile.



Caregiver Demographics

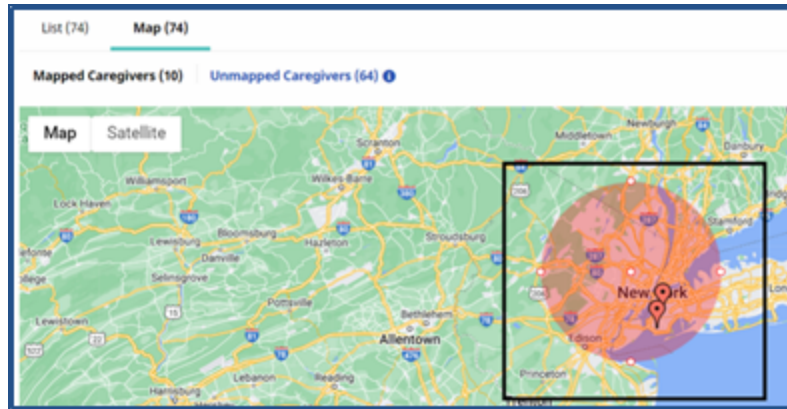
Map View: Selectable Area

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.



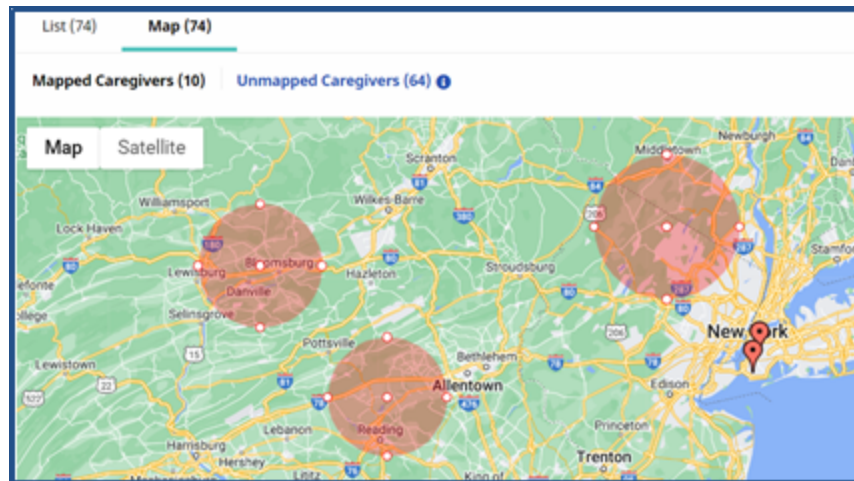
Select a Pointed Area

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.



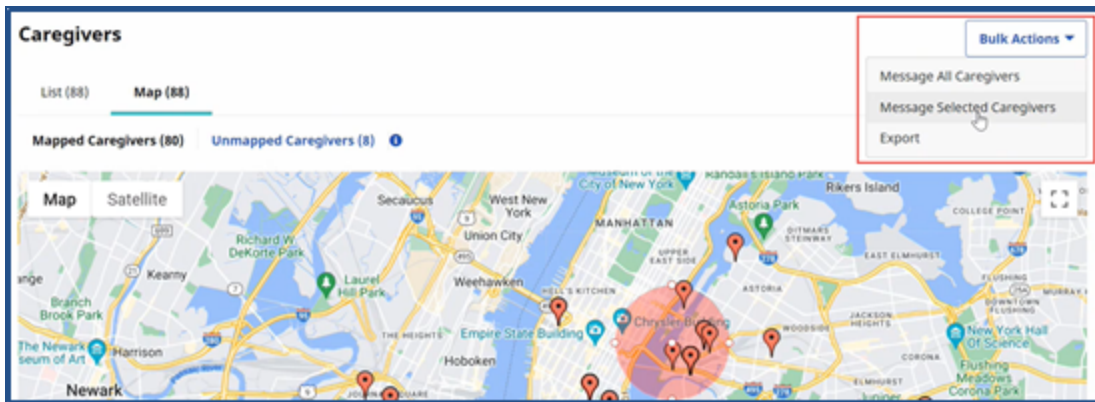
Select Multiple Areas

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



Delete Selected Area

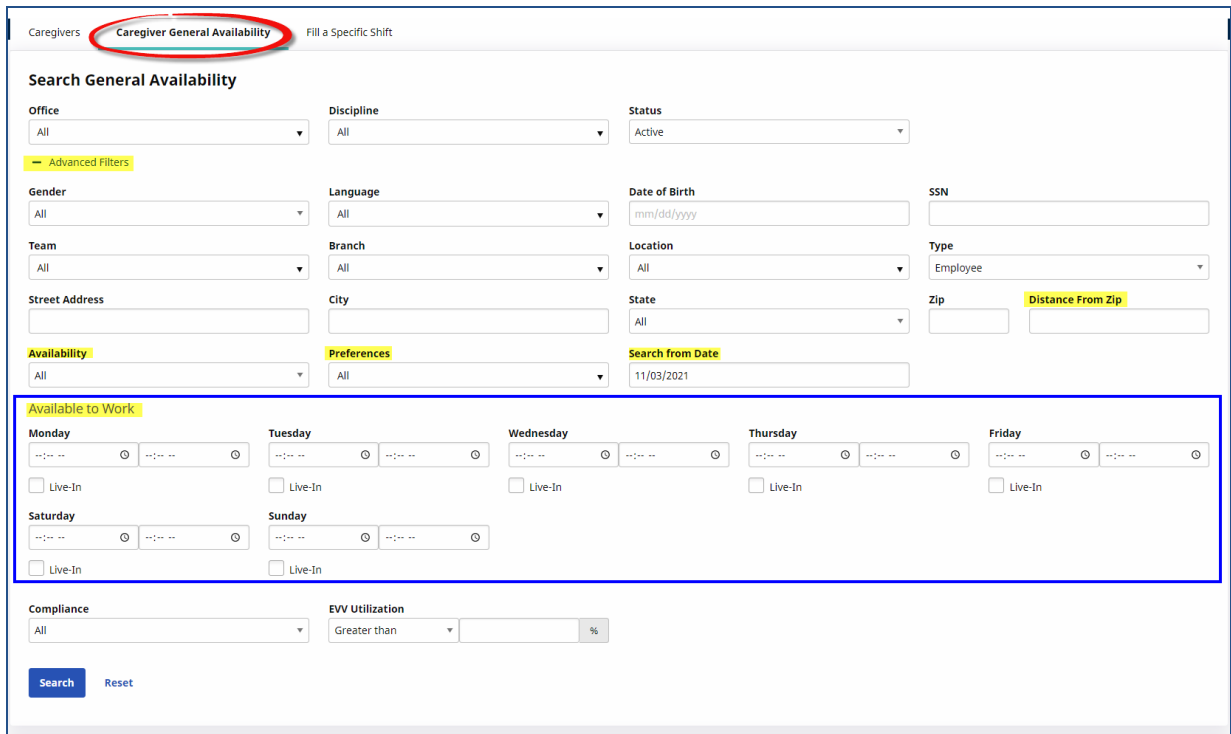
Once Caregivers are selected from the Map, click on the **Bulk Actions** button and select *Message Selected Caregivers*.



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.

Caregivers

Caregivers **Caregiver General Availability** Fill a Specific Shift

Search General Availability

Office _____ Discipline _____ Status _____

Active Caregivers Availability Over a 7-day Period Bulk Actions ▾

List (9) Map (9)

Show availability information

Legend: ✔ Start/end of a payroll week | 📅 Scheduled visit | 🚫 In Service | 🛑 Absence | ✔ Prefers to work these hours | ✔ Might work these hours

Caregiver	Wednesday, 11/3/2021	Thursday, 11/4/2021	Friday, 11/5/2021	Saturday, 11/6/2021	Sunday, 11/7/2021	Monday, 11/8/2021	Tuesday, 11/9/2021	Total Scheduled Hours	Actions
<input type="checkbox"/> Amm I Will LIS-1333	📅 0800-2000	✔ 0800-2000	✔ 0800-2000	✔ 1200-1800	✔ 1200-1800	✔ 0800-2000	✔ 0800-2000	0	...
<input type="checkbox"/> Singer D Adele LIS-1334	📅 1300-1700	📅 1300-1700	📅 1300-1700	---	---	📅 1300-1700	📅 1300-1700	20:00	...
<input type="checkbox"/> Boyd Patti LIS-1345	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	✔ 0800-0800 ✔ Live-In	20:00	...
<input type="checkbox"/> Mark E Mark LIS-1336	📅 0800-0800	---	✔ 0800-0800	---	---	📅 0800-0800	📅 0800-0800	120:00	...

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

Component	Description
1	<p>Legend</p> <p>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>.</p>
2	<p>Caregivers</p> <p>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).</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> </div> <p style="text-align: center;">Caregiver Information</p>

Component	Description
	View Caregiver Profile or Assign to Shift options are available at the bottom 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. Hovering 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.

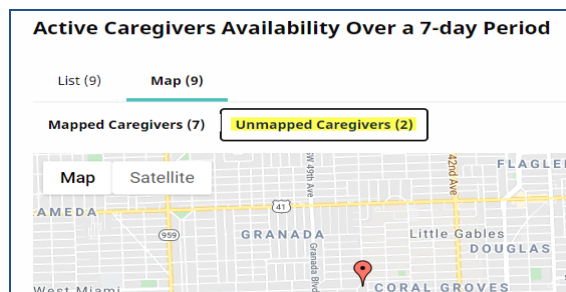
Legend: Start/end of a payroll week | Scheduled visit | In Service | Absence | Prefers to work these hours | Might work these hours

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 QUE-1008	--	--	--	--	--	--	--	0	03/24/2022	...
Sheeran Ed MIA-1016	--	--	--	--	--	--	--	0	03/24/2022	...
Burruss Kandi MIA-1018	0215-0230 0800-0800 0800-2300	0800-2300 Live-In	0800-0800	0800-0800	0800-2200	0800-0100	0800-2300	01:15	03/21/2022	...

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 (2) ✕

Caregiver Name	Caregiver Code	Office	Address
Amm I Will	LIS-1333	Lisset's Office	1234 Brickell Avenue MIAMI, FL, 33132
Kramer Miriam	LIS-1599	Lisset's Office	

« Previous
1
Next »
1 - 2 of 2

Close

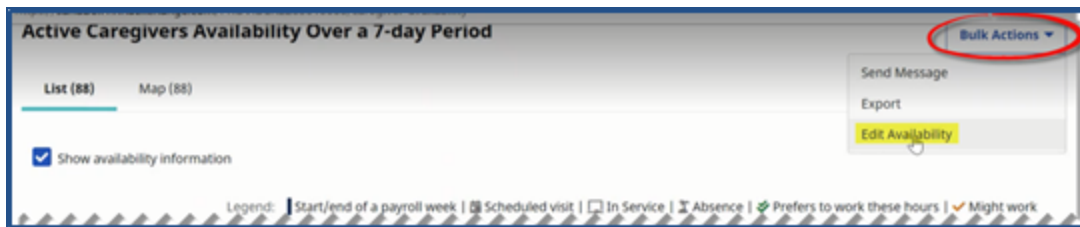
Unmapped Caregivers Window

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.



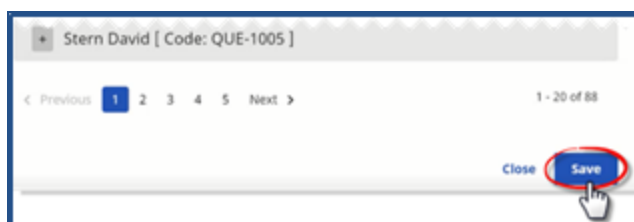
Edit Availability

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

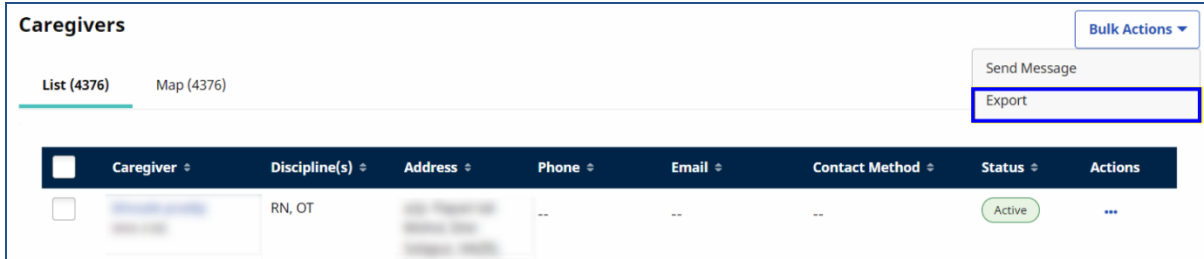
The system alerts of a successful update.



Availability Updated Successfully

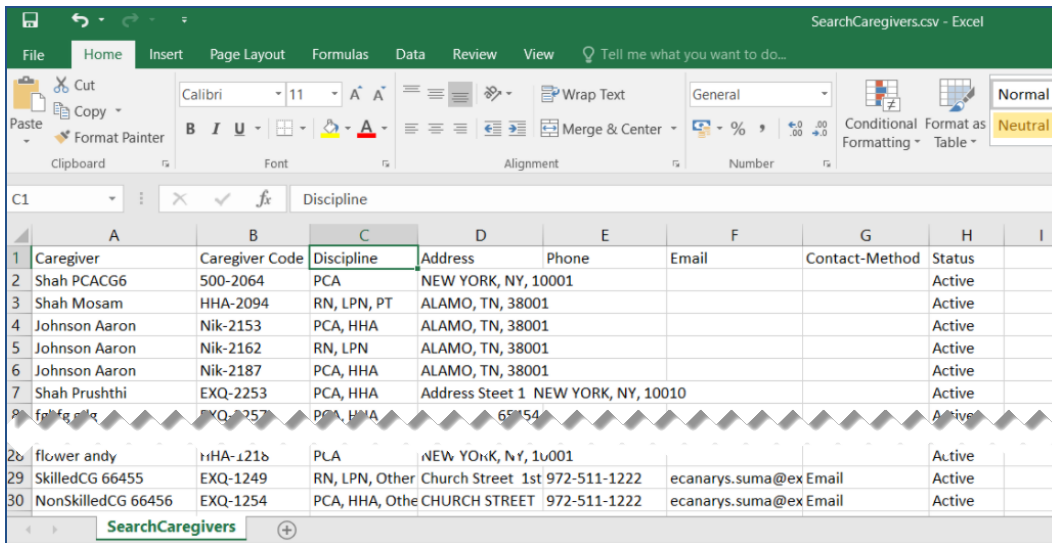
Bulk Action Export

An *Export* option has been added to the **Bulk Actions** button (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.

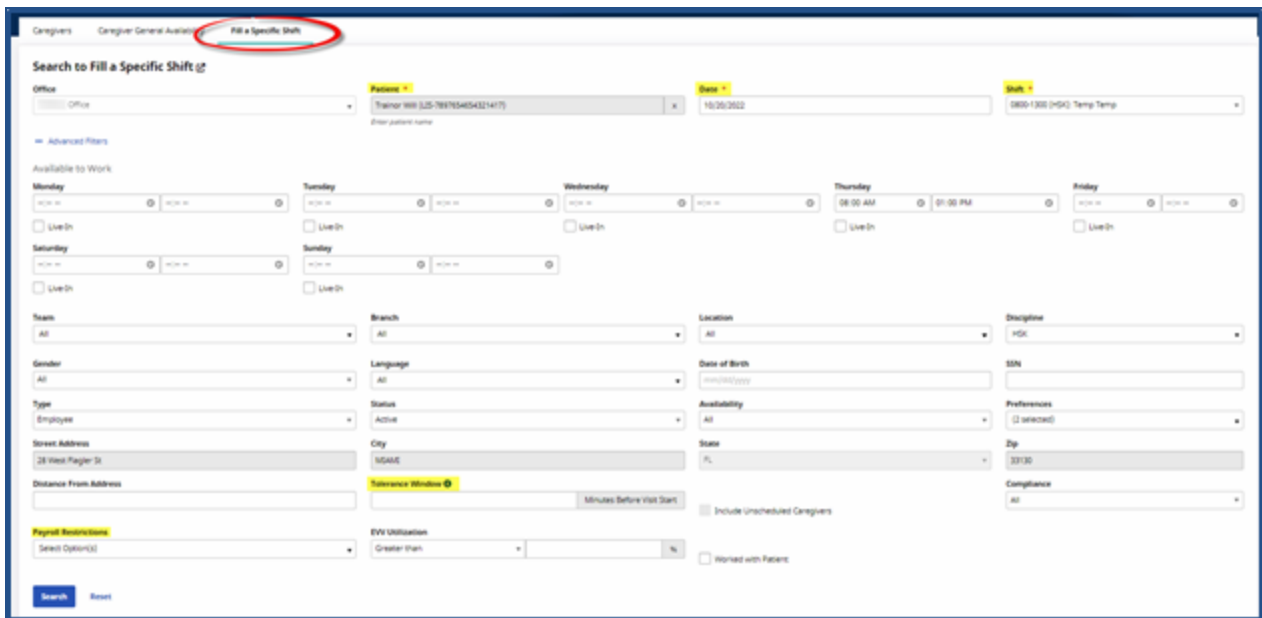


Caregiver Search: Export File

Fill a Specific Shift

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

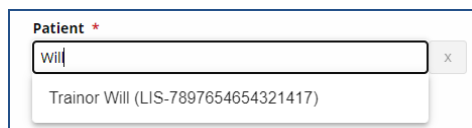
To search for Caregivers to fill a specific shift, select the **Fill a Specific Shift** tab on the *Caregiver Search* page. Once selected, additional filter fields appear to include **Patient**, **Date**, and **Shift** (all required as denoted by a red asterisk). In the **+Advanced Filters** section, 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)

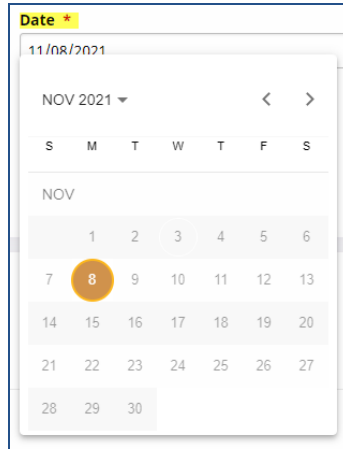
To ensure that a Caregiver is scheduled for a Patient in a corresponding office, the **Office** field becomes unavailable once a Patient is selected on the *Fill a Specific Shift* Caregiver Search page. The **Patient Address** field is automatically as well as the **City**, **State**, and **Zip** fields 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.



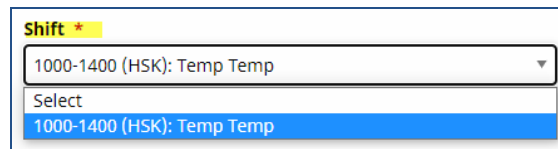
Auto-Suggest Patient Field

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.

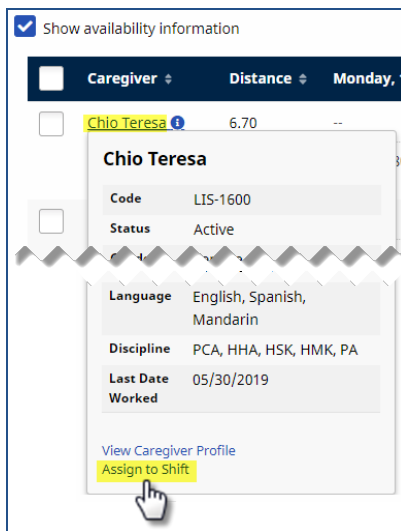


Shift Field

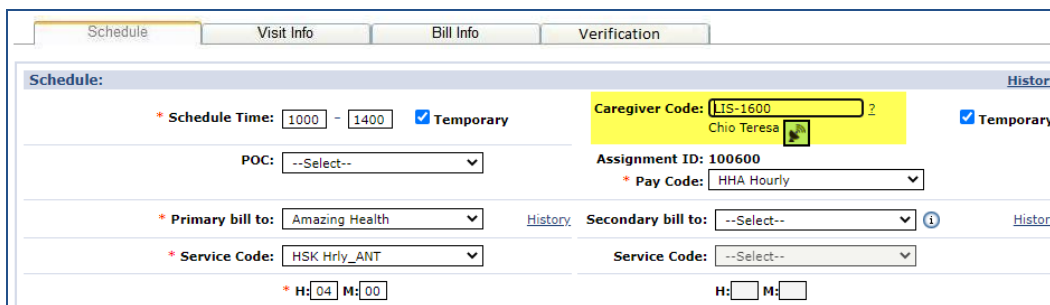
Assigning a Caregiver

On the *Search Results*, click on the [Caregiver Name](#) (link) to access a quick-view 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).

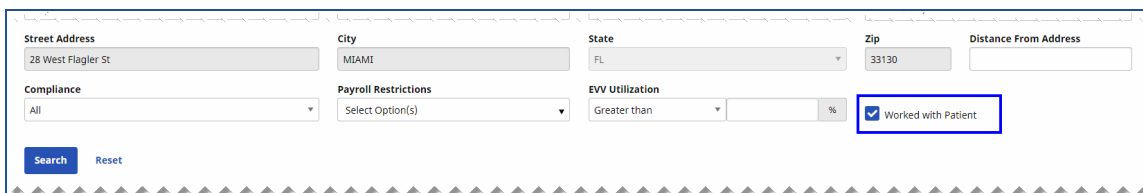


Assign Caregiver to Shift



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

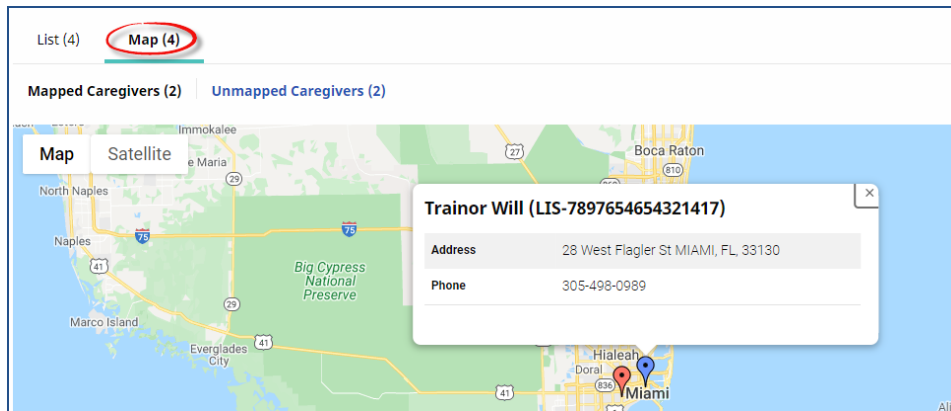
Once *Matching Caregivers* is selected, the Provider is routed to the Caregiver Search/Availability module. Note that the **Patient**, **Date**, and **Shift** fields are automatically filled in the criteria. Select additional options, if desired.

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

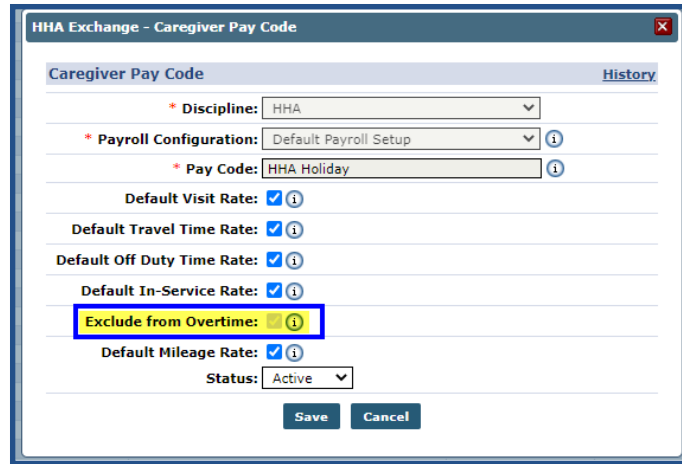
In the **Fill a Specific Shift** option, under the *Advanced Filters* section, payroll overtime rules values have been added to the **Payroll Restrictions** filter field, selected to exclude Caregivers from a search with overtime potential. The following table contains the values and descriptions.

Value	Select to...
40 Hour OT	generate searches for Caregivers who have not exceeded the 40-hour 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.

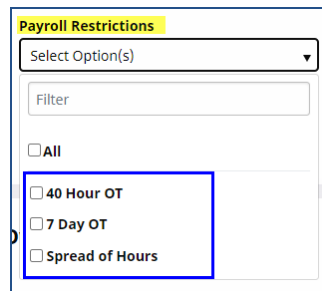
Exclude from Overtime Pay Code Setting

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).

Legend: █ Start/end of a payroll week | Scheduled visit | In Service | Absence | Prefers to work these hours | Might work 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 Sched Hours
Pacino Al QUE-1008	--	--	--	--	█	--	--	0
Negron Luisa QUE-1010	--	--	--	--	█	✓ Live-In	✓0800-2000	0
Cass Tony QUE-1011	✓0800-0800	✓0800-0800	✓0800-0800	✓0800-0800	█	✓0800-0800	✓0800-0800	0

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.

The screenshot shows the 'Caregiver Search' interface with the 'Fill a Shift' option selected. The search filters include Office(s)*, Patient, Discipline, Gender, Availability, Daily Availability, Team, Date, Language, State, Preferences, Branch, Shift, Type, City, Location, Status, Zip, and Distance from Zip (Miles). The search results table shows 4 results, with the first result highlighted in yellow for the 1/10/2021 (Sunday) shift.

Caregiver Name	Caregiver Code	Availability	Distance	1/8/2021 (Friday)	1/9/2021 (Saturday)	1/10/2021 (Sunday)	1/11/2021 (Monday)	1/12/2021 (Tuesday)	1/13/2021 (Wednesday)	1/14/2021 (Thursday)	Total
pandeyab Susha ntab	EXQ-1081	<input type="checkbox"/>	N/A	0700-1200	0700-1200	0700-1200					15:00
John Johnson Jr											

Fill a Specific Shift: Consecutive Shifts

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).

Show availability information

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 Hours
<input type="checkbox"/> Chlo Teresa LIS-1600	6.70	-- ✔0800-0800 ✔Live-In	📅1000-1400 ✔0800-0800 ✔Live-In	📅1000-1400 ✔0800-0800 ✔Live-In	📅1000-1400 ✔0800-0800 ✔Live-In	📅1000-1400 ✔0800-0800 ✔Live-In	--	--	16:00
<input type="checkbox"/> Laffleur Blanca LIS-1350	6.80	-- ✔0800-0800 ✔Live-In	-- ✔0800-0800 ✔Live-In	-- ✔0800-0800 ✔Live-In	-- ✔0800-0800 ✔Live-In	-- ✔0800-0800 ✔Live-In	--	-- ✔0800-0800 ✔Live-In	0

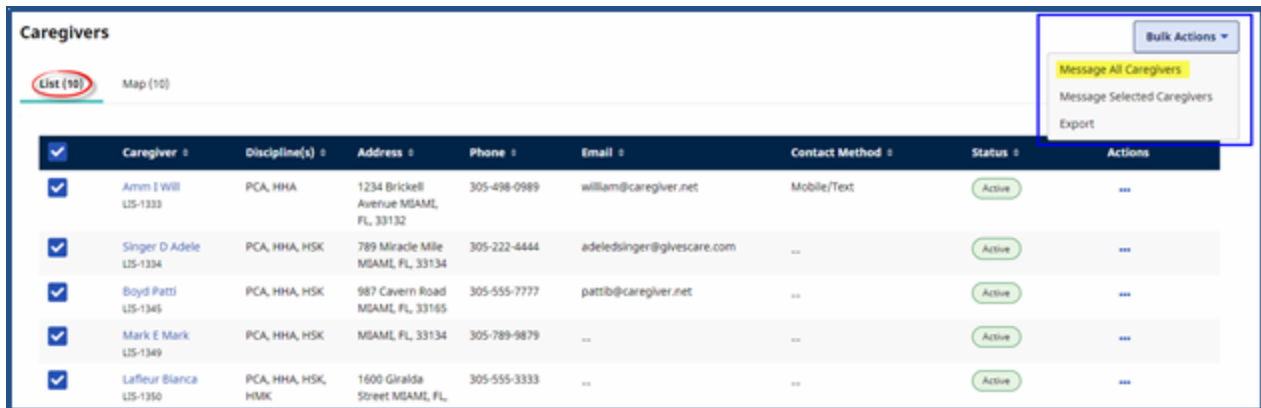
Payroll Week: Total Hours

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**.

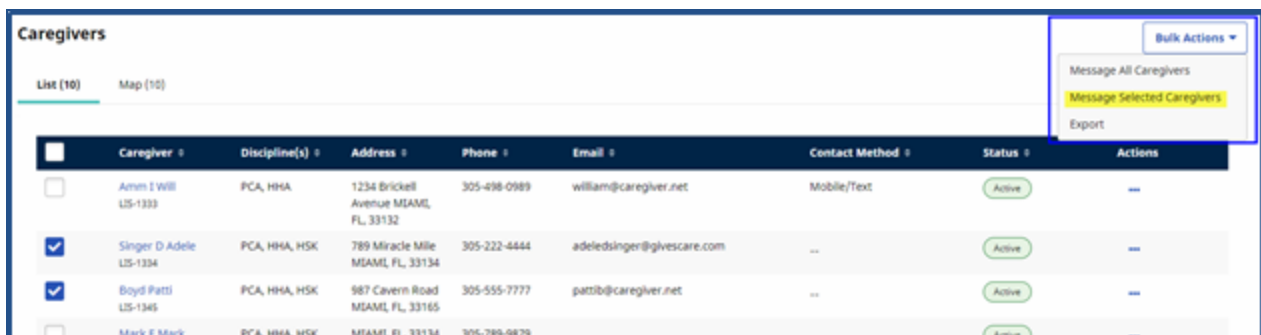
From the results, select the Caregivers to message. Selecting all per page (by selecting the header checkbox) only selects the Caregivers on the page (50 per page). Click on the **Bulk Actions** button (located on the top-right section of the Search Results) and select *Message Selected Caregivers*.

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*.



Sending a Message to All Caregivers via Caregiver Search

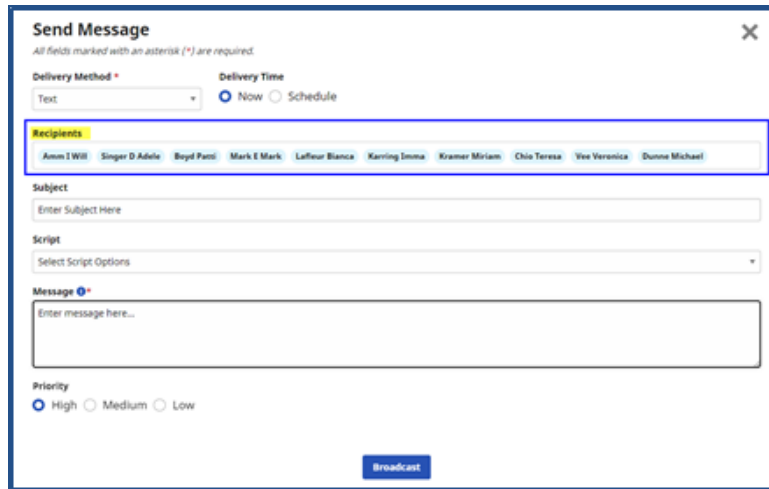
To message selected Caregivers on the search, select the Caregiver(s) on the page. Click on the **Bulk Actions** button and select *Message Selected Caregivers*.



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**.

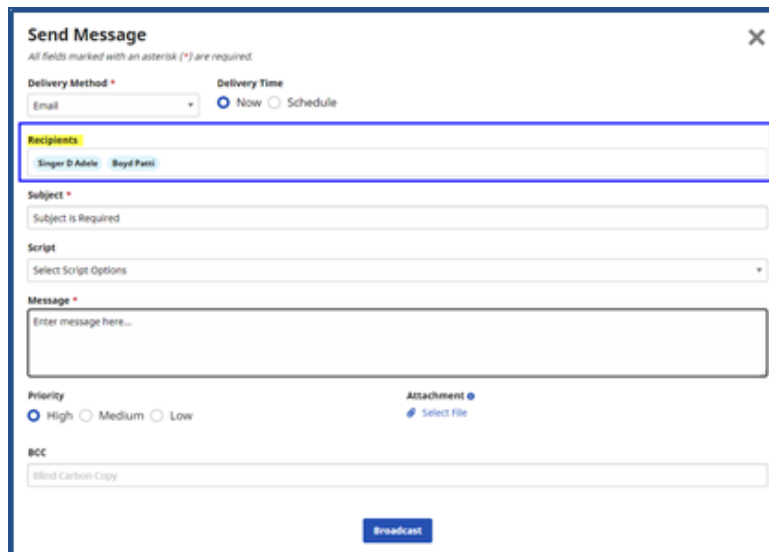


The screenshot shows the 'Send Message' window with the following details:

- Delivery Method:** Text
- Delivery Time:** Now (selected), Schedule
- Recipients:** A list of names including Ann L Will, Singer D Adelle, Boyd Patti, Mark E Mark, Lafleur Bianca, Karring Imma, Kramer Miriam, Chio Teresa, Vee Veronica, and Dunne Michael.
- Subject:** Enter Subject Here
- Script:** Select Script Options
- Message:** Enter message here...
- Priority:** High (selected), Medium, Low
- Buttons:** 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.



The screenshot shows the 'Send Message' window with the following details:

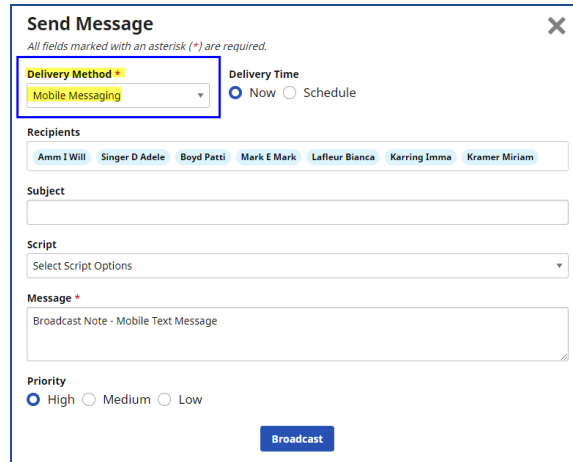
- Delivery Method:** Email
- Delivery Time:** Now (selected), Schedule
- Recipients:** A list of names including Singer D Adelle and Boyd Patti.
- Subject:** Subject is Required
- Script:** Select Script Options
- Message:** Enter message here...
- Priority:** High (selected), Medium, Low
- Attachment:** Select File
- BCC:** Blind Carbon Copy
- Buttons:** Broadcast

Broadcast Message to Selected: Email Delivery Method

Mobile App Delivery Methods

Mobile App Messaging options are also available.

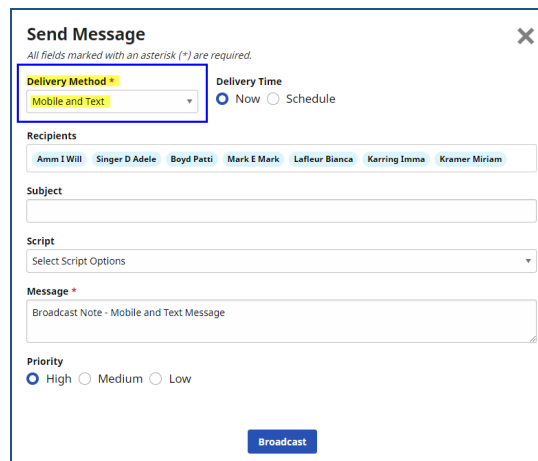
When the **Mobile Messaging** option is selected, then only a Mobile Message is broadcasted.



The screenshot shows the 'Send Message' interface. At the top, it says 'Send Message' with a close button. Below that, a note states 'All fields marked with an asterisk (*) are required.' The 'Delivery Method' dropdown menu is highlighted with a blue box and contains the option 'Mobile Messaging'. To the right, the 'Delivery Time' section has radio buttons for 'Now' (selected) and 'Schedule'. Below this is a 'Recipients' section with a list of names: Amm I Will, Singer D Adele, Boyd Patti, Mark E Mark, Lafleur Bianca, Karring Imma, and Kramer Miriam. There are input fields for 'Subject' and 'Script' (with a dropdown for 'Select Script Options'). The 'Message' field contains the text 'Broadcast Note - Mobile Text Message'. At the bottom, there is a 'Priority' section with radio buttons for 'High' (selected), 'Medium', and 'Low', and a blue 'Broadcast' button.

Broadcast Message: Mobile Messaging

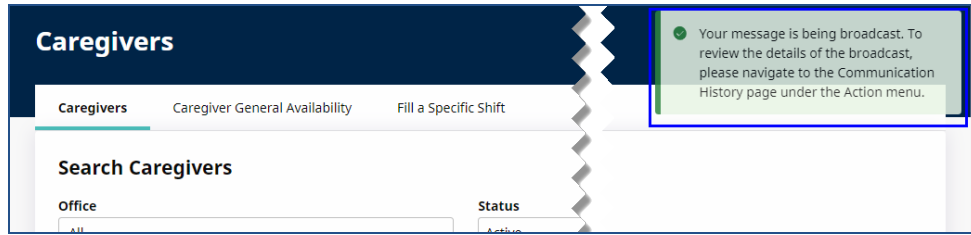
When the **Message and Text** option is selected, and the Caregiver’s Unique Mobile ID is enabled with a Device ID, then a Mobile Message is broadcasted; otherwise a text message is sent.



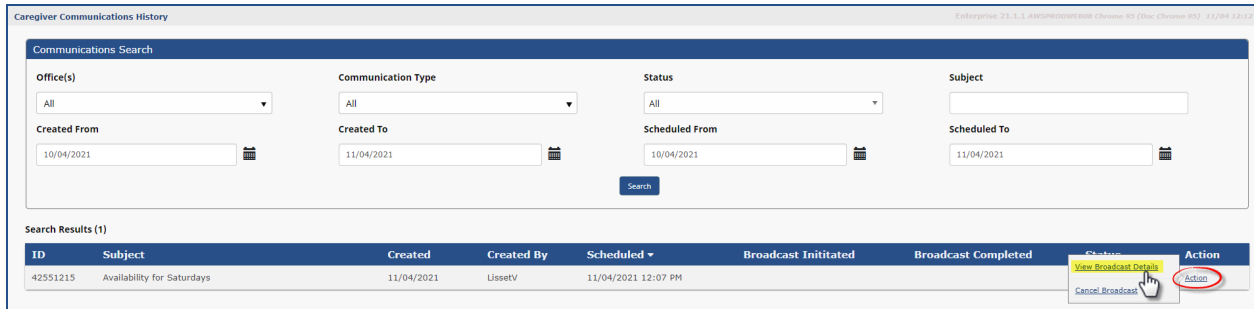
The screenshot shows the 'Send Message' interface. At the top, it says 'Send Message' with a close button. Below that, a note states 'All fields marked with an asterisk (*) are required.' The 'Delivery Method' dropdown menu is highlighted with a blue box and contains the option 'Mobile and Text'. To the right, the 'Delivery Time' section has radio buttons for 'Now' (selected) and 'Schedule'. Below this is a 'Recipients' section with a list of names: Amm I Will, Singer D Adele, Boyd Patti, Mark E Mark, Lafleur Bianca, Karring Imma, and Kramer Miriam. There are input fields for 'Subject' and 'Script' (with a dropdown for 'Select Script Options'). The 'Message' field contains the text 'Broadcast Note - Mobile and Text Message'. At the bottom, there is a 'Priority' section with radio buttons for 'High' (selected), 'Medium', and 'Low', and a blue 'Broadcast' button.

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.

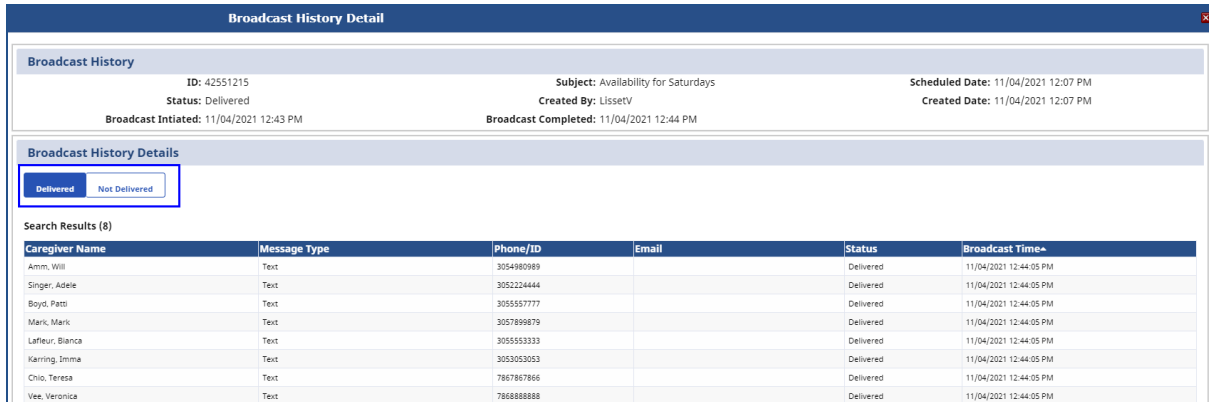


To view broadcast details, navigate to the *Caregiver Communications History* page (**Action > Caregiver Communications History**) and search for the communication using the search filters. On the Search Results, select *View Broadcast Details* from the [Action](#) link (as seen in the image below).



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 History Detail

Broadcast History

ID: 42551215	Subject: Availability for Saturdays	Scheduled Date: 11/04/2021 12:07 PM
Status: Pending	Created By: LissetV	Created Date: 11/04/2021 12:07 PM
Broadcast Initiated:	Broadcast Completed:	

Broadcast History Details

Delivered Not Delivered

Search Results (1)

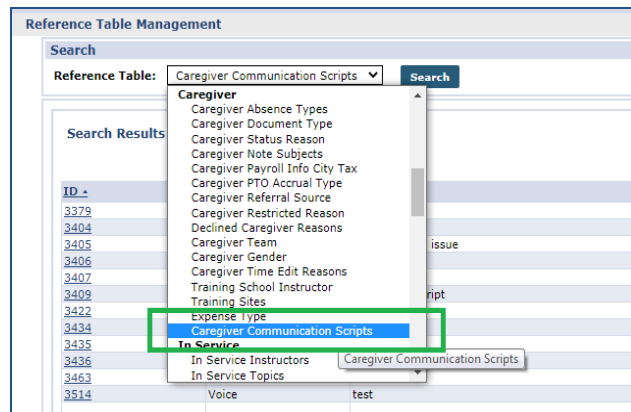
Caregiver Name	Message Type	Status	Reason
Kramer, Miriam	Text	Failed	NotificationTextNumber is not configured

Broadcast Not Delivered

Message Scripts via Reference Table Management

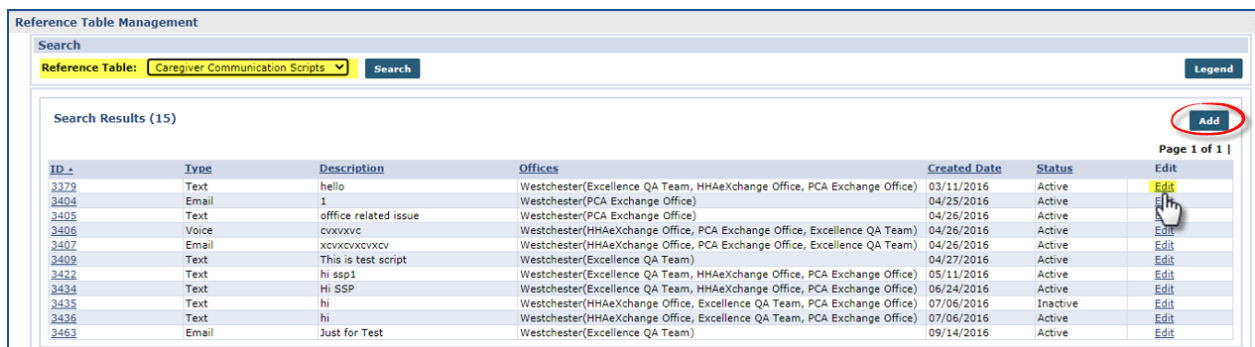
Message scripts are created and managed via the Reference Table Management functionality. To access, navigate to **Admin > Reference Table Management**. From the **Reference Table** field, select **Caregiver Communication Scripts** from the **Caregiver** category.

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.



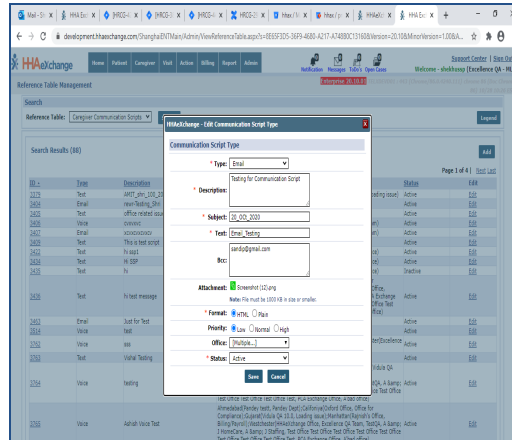
ID -	Type	Description	Offices	Created Date	Status	Edit
3379	Text	hello	Westchester(Excellence QA Team, HHAExchange Office, PCA Exchange Office)	03/11/2016	Active	Edit
3404	Email	i	Westchester(PCA Exchange Office)	04/25/2016	Active	Edit
3405	Text	office related issue	Westchester(PCA Exchange Office)	04/26/2016	Active	Edit
3406	Voice	cxvxcvc	Westchester(HHAExchange Office, PCA Exchange Office, Excellence QA Team)	04/26/2016	Active	Edit
3407	Email	cxvxcvcvcv	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.

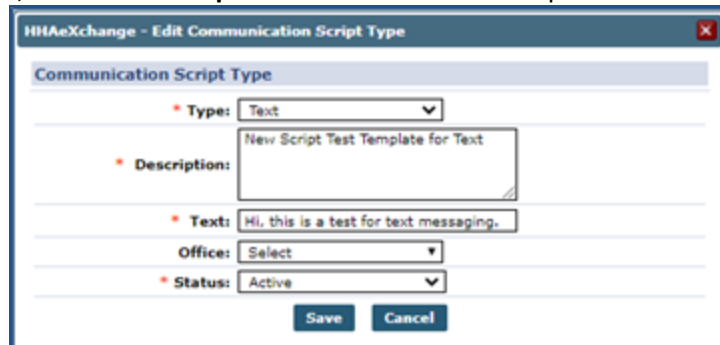
To edit a Script, click on the **Edit** link from the existing script in the Reference Table. The **Edit Communication Script Type** window opens. Select or enter required fields (denoted with a red asterisk).

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



Email Script Type Fields

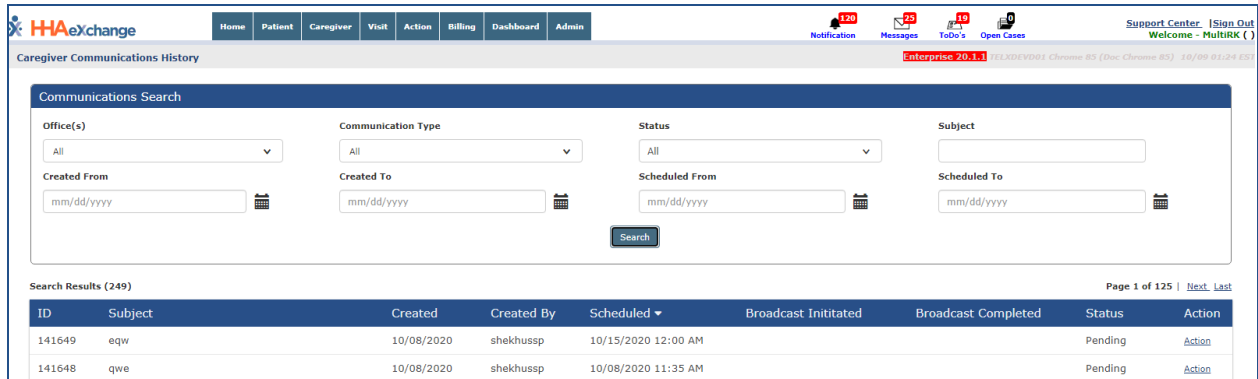
If **Text Type** is selected, then the **Description** and **Text** fields are required.



Text Script Type Fields

Caregiver Communications History Page

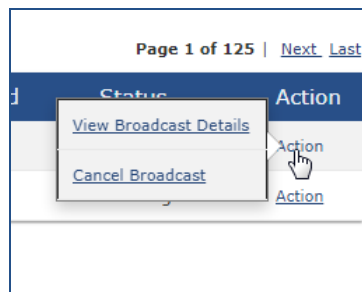
Navigate to **Action > Caregiver Communication History** to access the *Caregiver Communications History* page. Use the available search filters to locate specific communications. From the Search Results, view the list of communications returned based on the chosen criteria.



Caregiver Communication History Search

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

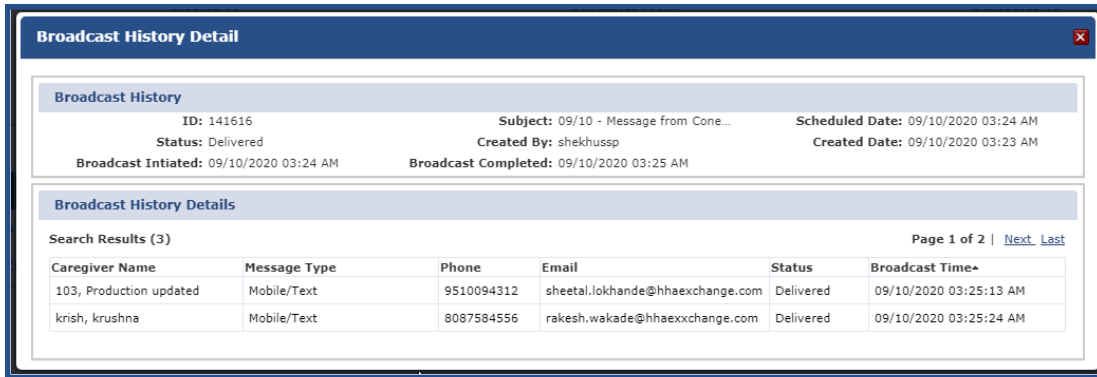
Select the [Action](#) link from the respective communication to either *View Broadcast Details*, *Cancel Broadcast*, or *Print* the message.



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.



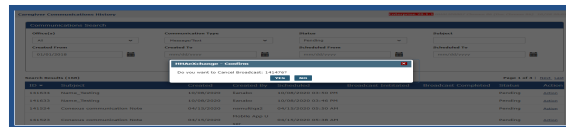
Broadcast History Detail Window

Cancel Message Broadcasts

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



Cancel Broadcast



Broadcast Cancellation Confirmation

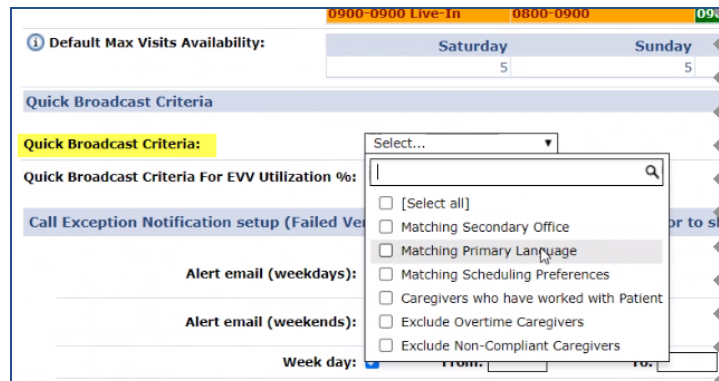
Quick Broadcast Criteria Section at Agency Setup

Providers can configure Quick Broadcast criteria via the *Quick Broadcast Criteria* section on the *Agency Info* page (**Admin > 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 Active, and are available to work (for example, availability on their schedule, no restrictions for the contract, etc.).

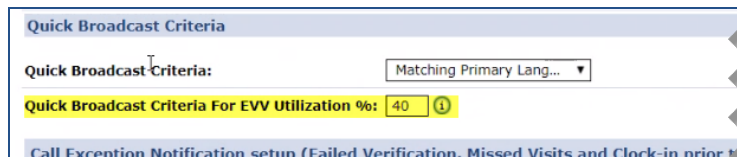
Select specific options from the **Quick Broadcast Criteria** dropdown field, to include:

- 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

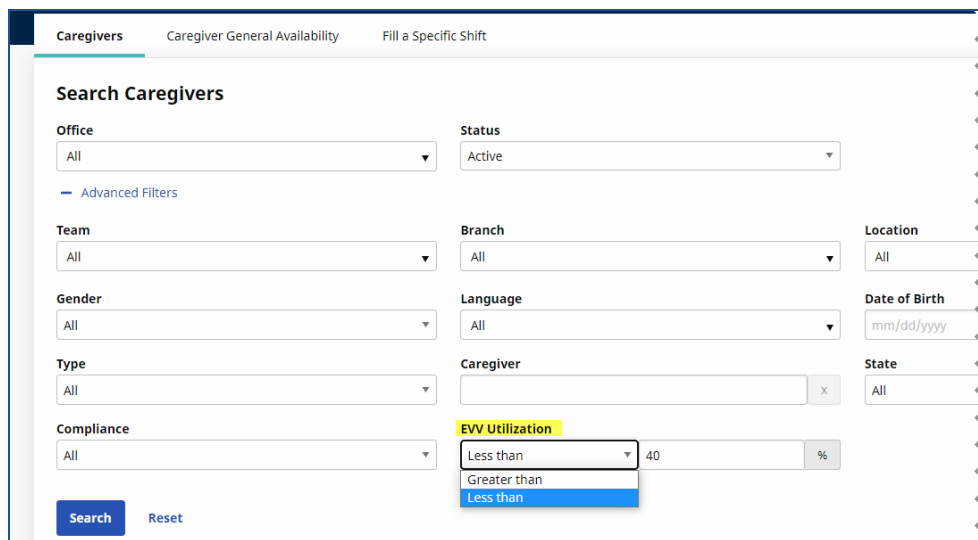
EVV Utilization Tracking

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.



The screenshot shows the 'Search Caregivers' interface with various filter fields. The 'EVV Utilization' field is highlighted, and its dropdown menu is open, showing 'Less than' selected. The value '40' is entered in the adjacent input field, followed by a percentage sign. Other filters include Office, Status, Team, Branch, Location, Gender, Language, Date of Birth, Type, Caregiver, and State.

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.

Profile

Demographics

* First Name: NonSkilled Middle Name:

* Last Name: ROY * Initials: NR

HHA/PCA Registry Number: Added/Checked Registry Date:

Professional License Number: NPI Number:

Referral Source: Agency Referral Person:

NYC Registry checks: Signed Payroll Agreement: No Date: ⓘ

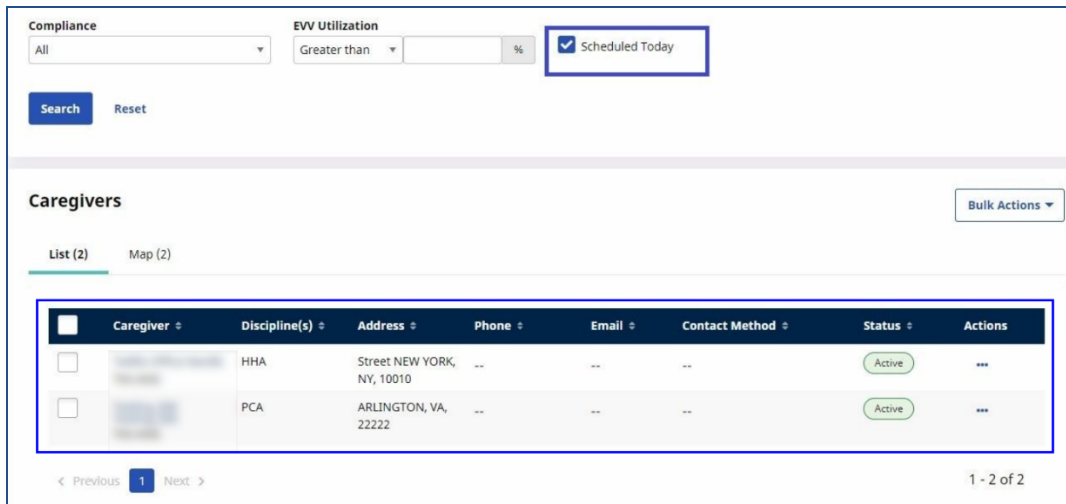
Exclusion/Verification Lists Checked On: 01/30/2020 [Verify Now](#) ⓘ **EVV Utilization: 70.93**

Caregiver Profile: EVV Utilization (Percentage Count) Field

Scheduled Today Field

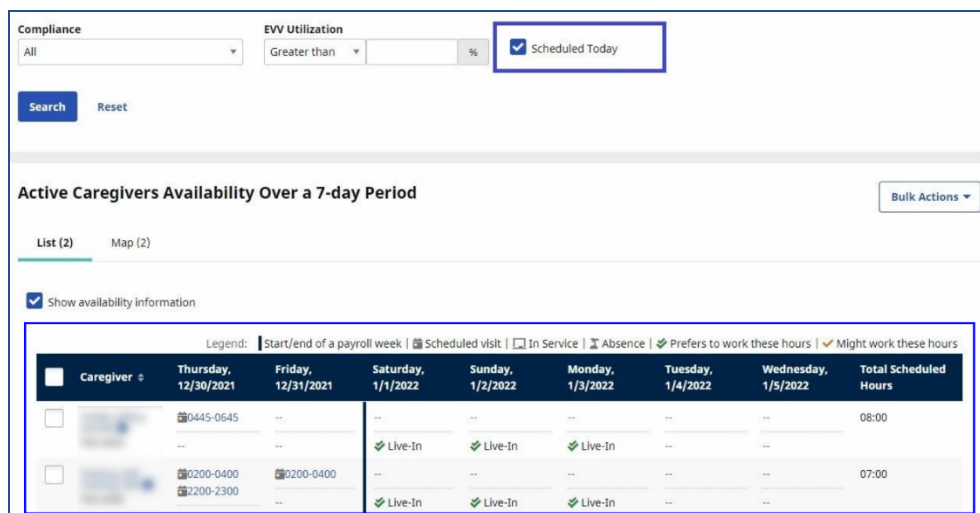
A **Scheduled Today** search checkbox field has been added under the *Advanced Filters* section in all Caregiver Search pages (*Caregivers*, *Caregiver General Availability*, and *Fill a Specific Shift*) to search for only visits scheduled for the current day.

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



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