Caregivers in Multiple Offices Process Guide

Provider and User Guide

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Caregivers in Multiple Offices

Overview

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

Several agencies have multiple offices (locations) across an area that require their Caregivers to service Patients under multiple offices. The **Caregiver Multiple Office** feature allows Agencies to create a single Caregiver profile for multiple offices by assigning a Primary and a Secondary Office(s).

The Caregiver Multiple Office feature is optional and available for those Agencies who choose to streamline their Caregiver profiles. Existing profiles or processes are not affected by activating this functionality. Refer to the System Requirements for essential parameters.

This category solely covers the functionality and operations of the **Caregiver Multiple Office** feature in the HHAeXchange (HHAX) system. Refer to the Caregiver Management category to access general details on Caregiver pages.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAX 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

Primary Office and Secondary Offices

A **Primary Office** is defined as the home (custodial) office where a Caregiver's core functionality and records are maintained, including Compliance, Payroll, and Team/Location/Branch Assignments.

The Primary Office dictates the following Caregiver functions:	
• In-Service • Payroll • Compliance • Absences • Restrictions • **Travel Time**	• Expenses • Scheduling Preferences • Overtime Scheduling Validations • Visit/Absence/In-Service Overlap Configurations • Exclusion List Checks

A **Secondary Office** refers to supplemental areas where a Caregiver's services may be required outside of their Primary Office. Although the Caregiver's profile can only be edited via the Primary Office, Providers can view and schedule a Caregiver through a Secondary Office (based on access rights).

Secondary Office Setup Requirements

The Payroll Setup, Duty List Setup, and Time Zone are all governed by the Caregiver's Primary Office. Assigned Secondary Offices must have the *exact* same **Payroll Setup** (configuration), **Duty List Setup**, and **Time Zone** as the Caregiver's Primary Office. If these parameters are not the same, then the Caregiver cannot be assigned to a Secondary Office. Refer to the Caregiver Profile section.

Moreover, the system does not allow users to change these settings in a Secondary Office.

Note: The 3-character Office Code (which appears as the prefix in the Caregiver ID) remains associated with the Primary Office.

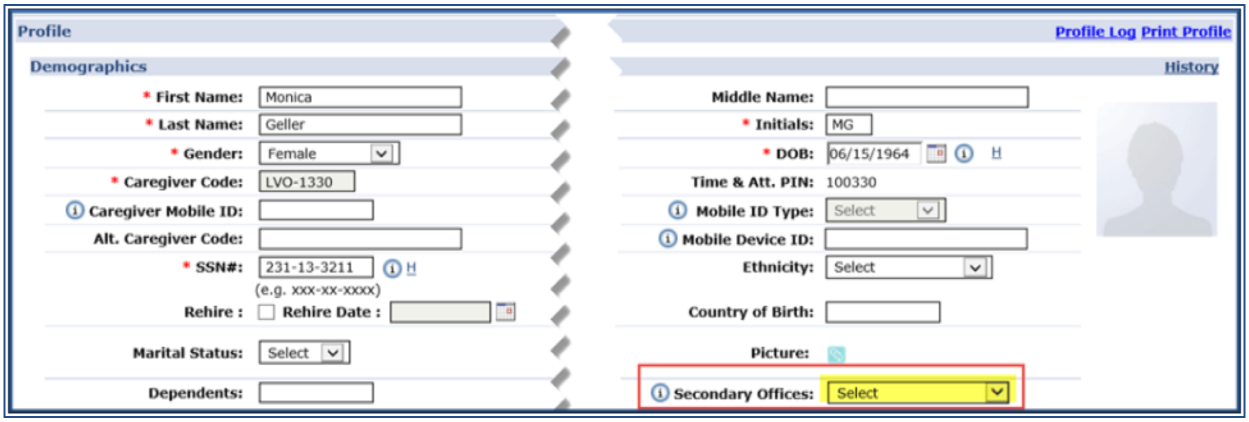
New Caregiver

When creating a New Caregiver (***Caregiver > New Caregiver***), select the **Primary Office** from the drop-down menu listing the various Offices for an Agency. The functionality of this page remains the same.

Primary Office Field

Caregiver Profile Page

On an existing Caregiver's Profile (***Caregiver > Profile***) page, a **Secondary Offices** field is made available once the Caregiver's record has been saved.



Secondary Office Field

To assign a Secondary Office(s), click the dropdown arrow to view available offices. Only offices that match the following Primary Office configurations appear on this menu: **Payroll Setup, Duty List Setup,** and **Time Zone**.

All Office-related items for the Caregiver are controlled and based on their Primary Office settings. For example, Team, Location, and Branch are populated by the Reference Table values assigned in the Primary Office.

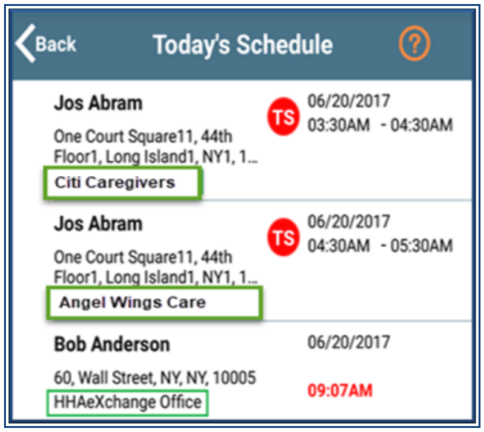
The Payer field shows all associated Payers to include those who are working in the Caregiver's Secondary Office(s).

Removing a Secondary Office(s)

Once a Secondary Office(s) has been saved, a user can only remove it when no data has been created or saved under it. If removal is necessary, the system automatically checks for open Schedules, Rates, Notes, and any Absence/Restrictions on the Secondary Office profile. If any records are found, the system does not allow removal and generates a message to the user.

Caregiver Mobile ID

Only one Caregiver Profile and unique Mobile ID is generated regardless of how many Offices the Caregiver is assigned to. On the Mobile App, the Caregiver's Primary Office is reflected on the header and all other offices are reflected on the Schedules, Visits, and Patients pages below the Patient/Visit details as seen on the image to the right.



Caregiver Mobile App Multi-Office

Caregiver Profile Header

If a Caregiver is only assigned to a single office, then the Primary Office is the one displayed in the header. If the Caregiver is assigned to Secondary Offices, the Primary Office displays as a hyperlink in the header area. Hovering over the **Office** field in the *Caregiver Info* section shows all assigned offices as well as **Caregiver Hours** (**H** and **V**) across all offices.

Office Field Display

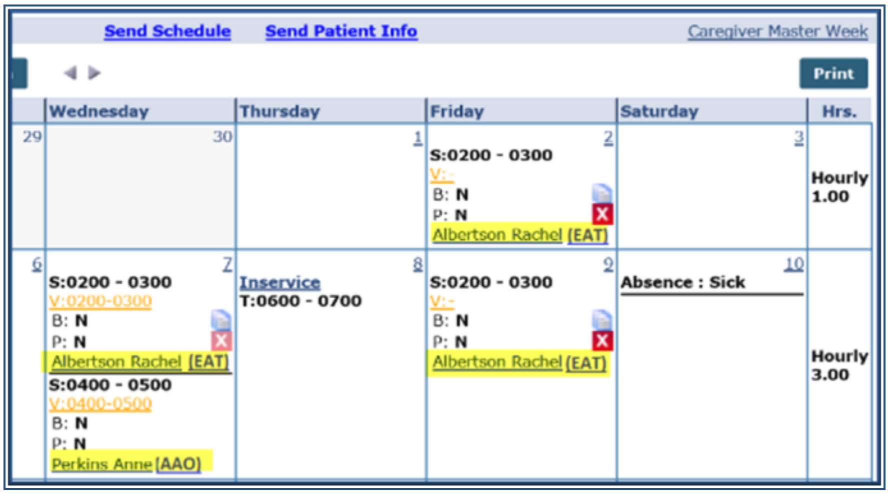
Caregiver Compliance Page

Users with permissions to the Caregiver's Primary Office can *add*, *edit*, *upload*, and *delete* on the Caregiver's Compliance page. Secondary Offices have **read-only access** to a Caregiver's Compliance page. Refer to the Permissions Table for further information.

Caregiver Calendar Page

Users with access to the Caregiver's Calendar page can view all *Visits*, *In-Services*, *Absences*, and *Travel Times* regardless of assigned offices. However, editing is controlled at the Patient and Caregiver's Primary Office.

If the Caregiver is assigned to any Secondary Office, the 3-character **Office Code** appears after each Patient's name for the Caregiver's visit (as seen in the image below).



Caregiver Calendar with Assigned Office Codes

Permissions Based on a Patient's Office

Permissions at the Patient Office level determine the available functionality for each visit. If a user has permissions in a Patient's Office, then the system allows edit functionalities. The following table provides guidance as to functionality permissions based on a Patient's Office.

For exact permission titles and descriptions refer to the Permissions Table.

Patient Office - Role Permissions		
Calendar Function	**If…**	**Then…**
Visit Confirmation Times	Yes	The system allows user to click and view popup
	No	Validation message appears stating "No permission"
Delete Button	Yes	User can view and delete
	No	The Delete button is disabled.
Copy and Paste/Create	Yes	The Copy/Copy and Create options appears and avail-

Patient Office - Role Permissions		
		able for User. All services for the Caregiver appear on the page.
	No	The Copy icon does not appear. Records appearing in gray (un-selectable) signify that the user does not have permission to Copy and Create those instances.
Patient Link	Yes	Click the hyperlinked Patient Name to route to the Patient's calendar.
	No	Validation message appears stating "No permission"
In-Service (in Caregiver's Calendar)	Yes	In-Service events and functions (such as add, edit, and delete) are created and controlled by the Caregiver's Primary Office. Secondary Office users have *read-only* limited access to In-Service records. Note: The Office field is locked in to the Caregiver's Primary Office when creating an In-Service event. Upon saving the class, the system verifies that In-Services do not overlap with Absences/Visits based on the Office settings. If an overlap exists between multiple Offices, then the system does not allow the save (even if one of the Offices is set to validate).
	No	Validation message appears stating "No permission"

Patient Search

The system allows users to search for Patients in all Offices (Primary and Secondary) a Caregiver is assigned to, based on their access rights.

When performing a Patient Search, the **Office** field is required. The results generated show all Offices for which the Caregiver is assigned (Primary and Secondary) and for which the user has access. A permission setting is available to accommodate this function. Refer to the Secondary Office Patient Search Section.

The **Office(s)** field is auto-selected with the Caregiver Primary Office providing that the user has access. If a user has no access for the Primary Office, then an Office must be selected from the dropdown menu to generate a search.

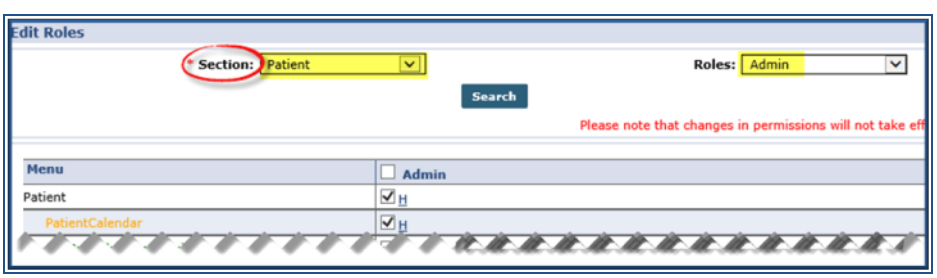
Patient Search Screen

Secondary Office Patient Search

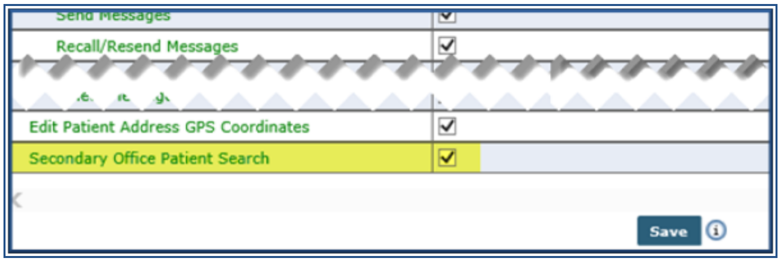
There are several places in the system where the user may be prompted to select a Patient and perform a specific action. For example, when selecting a Patient to create a visit on the Caregiver's Calendar or selecting a Patient to enter a Caregiver Note.

Because Caregivers can be assigned to multiple offices, this function is open to all Offices the Caregiver is assigned to. A permission titled **Secondary Office Patient Search** is available to accommodate a user's permissions for a Secondary Office(s).

To access this permission, navigate to ***Admin > User Management > Edit Roles*** and select *Patient* in the **Section** dropdown:



Role Permission via User Management > Edit Roles



Secondary Office Patient Search Permission (Patient Section)

Travel Time

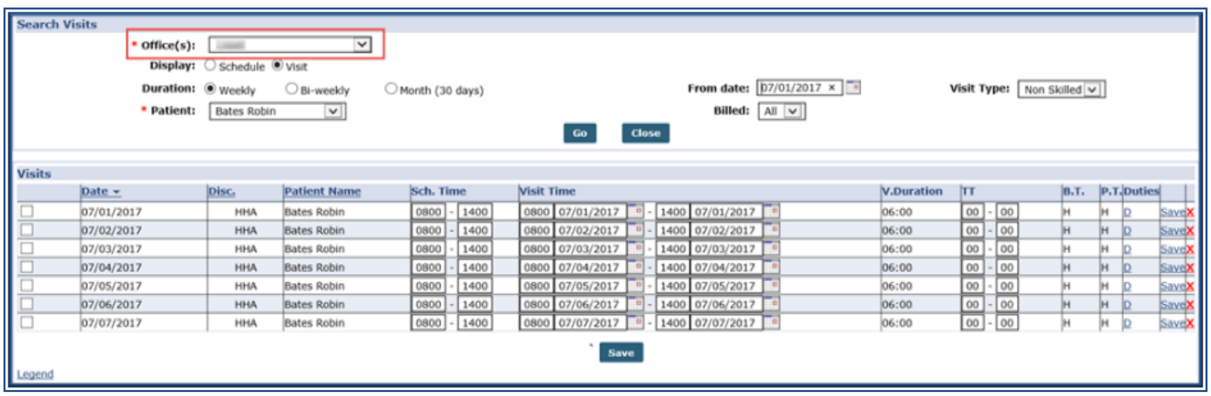
Travel Time records are associated with the Caregiver's Primary Office and a user must have access to *create*, *edit*, *delete*, and *copy* a Travel Time record.

Caregiver Visits Page

On the ***Caregiver > Visits*** page, the **Office(s)** field is required when searching for visit information. The Caregiver's Primary Office is auto-selected, provided that the user has access. If the user does not have access to the Primary Office, then the **Office** must be manually selected from the dropdown menu (list of a Caregiver's associated offices). Refer to the Secondary Office Patient Search Section for further information.

The **Patient** field populates after an Office is selected. Once an Office is selected, all Patients under the designated Office and associated with the Caregiver appear in the results.

Result values and functionality are determined by the Office of the selected Patient. User must have function-specific permissions to *edit* visit information (for example, to Confirm a Visit).

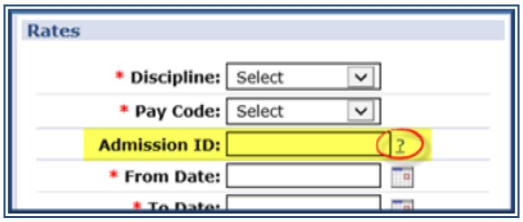


Caregiver Visit Search

Caregiver Rates Page

Minimal changes are required in the *Rates* page because payroll configurations must be the same for all Offices based on the Caregiver's Primary Office. Users must have access to the Primary Office to *add* or *edit* Caregiver rates. To search for Rates, click on the (?) hyperlink in the **Admission ID** field to generate a Patient Search associated with the Caregiver.

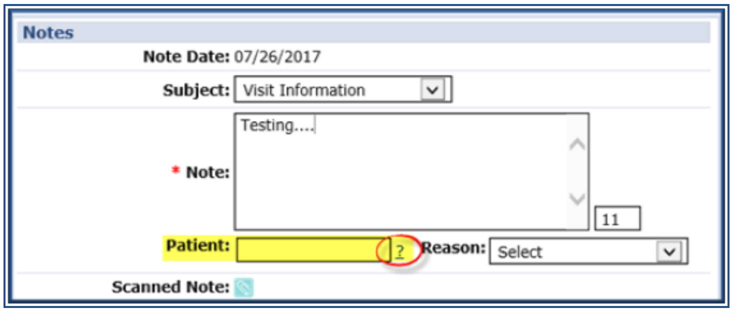
Refer to the Patient Search section for further information.



Caregiver Rate Window: Patient Search

Caregiver Notes Page

From the ***Caregiver > Notes*** page, users with the Caregiver's Primary Office permissions can *view*, *add*, *edit*, and *delete* Notes. Users with Secondary Office rights can only view Notes. To edit visit information, click the (?) hyperlink from the **Patient** field to generate a Patient Search and *add* Patient, as covered in section above.



Caregiver Notes Window

Caregiver Absence/Restriction Page

Absences

Absences can only be entered and approved at the Caregiver's Primary Office. When adding an Absence, include all Contracts assigned to the Caregiver's Primary and Secondary Offices. All users with access to the Caregiver Calendar can see Absence records.

Note that the **Absence and Visit overlaps** setting is based on the Primary Office's settings and may affect the functionality in the system; allowing or not allowing said function in Secondary Office(s).

Restriction

Restriction functions can only be edited at the Primary Office level. After making a selection to *add* or *edit* a Restriction, the Restricted Caregiver Contract window opens and all Contracts associated with the Caregiver are displayed in the dropdown menu, regardless of permissions.

If a restriction is entered for "All" Contracts, then all Offices are automatically selected.

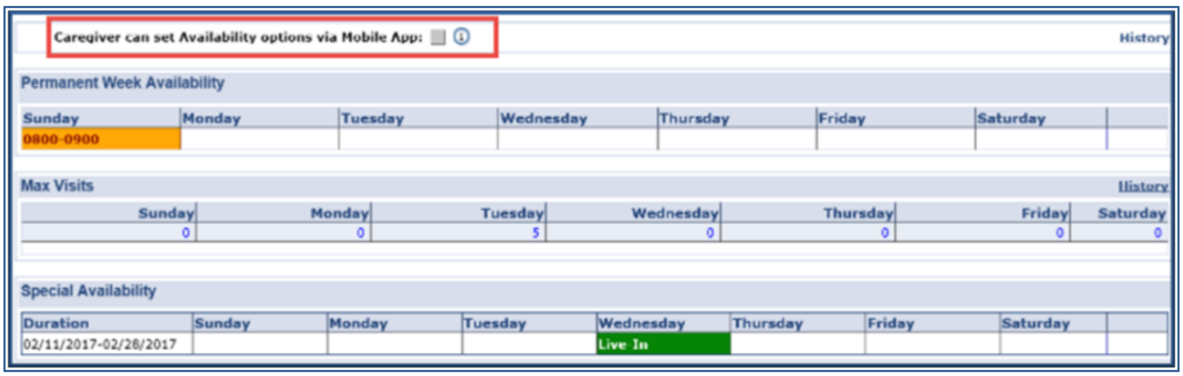
Caregiver Restriction Window

Caregiver Availability Page

The Availability Tab is controlled by the Caregiver's Primary Office settings. To *add* or *edit* a Caregiver's Availability options, one must have the "**EditAvailability**" system permissions which controls these functions.

As a result, the Availability options set in the *Permanent Week*, *Max Visits*, and *Special Availability* sections apply when searching availability at any of the Caregivers' Offices.

The option of **Caregiver can set Availability options via Mobile App** is unavailable if the user does not have permissions for the Caregiver's Primary Office.

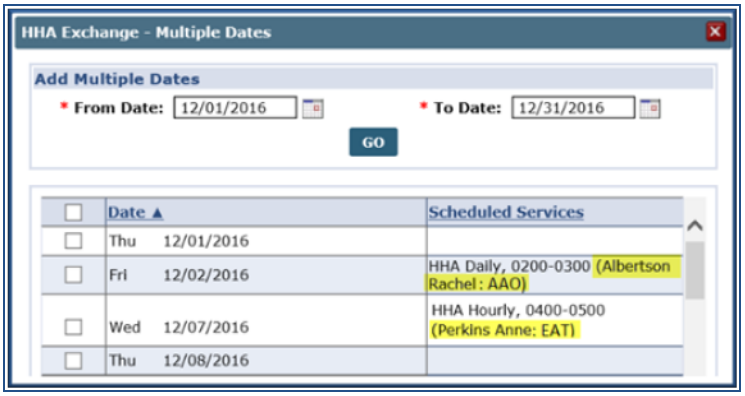


Caregiver Availability Screen

Caregiver Expenses Page

Expenses can only be added at the Caregiver's Primary Office level. When selecting a Patient for billable functions, the Office field is unavailable and the Patients must be selected from the Caregiver's Primary Office.

When adding Multiple Dates to an Expense, the system shows visits from Primary and Secondary Offices. The Office Code follows each Patient's name.



Caregiver Expenses: Multiple Dates

Caregiver Patient HX Page

The *Patient HX* page displays all Patients in the Caregiver's work history. Each Patient's **Admission ID** has the 3-character Office Code prefix to differentiate the Offices.

Patient HX

Patient Information

AdmissionID	Patient Name	Total Shifts
NYC-12345	Amerson Allan	1
EAT-12421421	Clark Cindy	1
NYC-213516316	Anderson Ralph	145
AAO-9787	Albertson Rachel	305

Caregiver Patient History

Caregiver Document Management Page

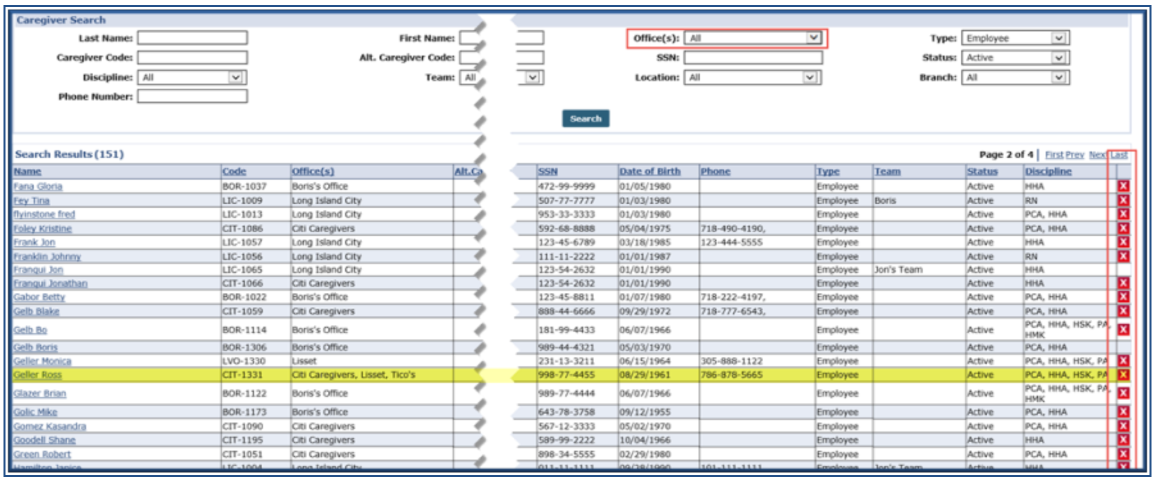
Document Management is controlled by the Caregiver's Primary Office where users can *add*, *edit*, *delete*, and *upload* documents. These functions are controlled by the **EditDocumentManagement** system permission.

Caregiver-Specific Functions

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

Caregiver Search

When performing a Caregiver Search, the **Office** field is preselected to *All* to include all Offices (Primary and Secondary) assigned to the Caregiver (as illustrated in the image below). Users with permissions to the Caregiver's Primary Office can view Caregivers' SSN and DOB information for all associated offices. Permissions at the Primary Office level also allow a user to *delete* a Caregiver.



Caregiver Search Page

Admin Module: Office Setup

The following sections apply to functions applicable to Caregiver pages administered in the *Admin* module.

Overtime Scheduling

When scheduling a Caregiver for a visit, the system checks the Overtime validation based on the Caregiver's Primary Office configuration. If a Caregiver is scheduled for a Patient in a Secondary Office, then the system issues the Overtime validation message advising of the configuration.

The **Can Override OT Limit** permission is set at the Role level designated by a Master Office. Although Roles are streamlined, this permission is granted on an individual user level. For example, a Caregiver is assigned to **Office 1 (Primary)** and **Office 2 (Secondary)**. Both offices are set up to check Overtime validation with the following Overtime configurations for *Hourly* visits:

Office	Configuration

1 - Primary	**Hourly Limit: 30 Hours** (assume Caregiver is already scheduled for 30 hours per week)
2 - Secondary	**Hourly Limit: 20 Hours** (assume Caregiver is not yet scheduled)

Now, when a new schedule of 2 Hours for Caregiver in Office 2 is created, the Overtime alert is prompted because this functionality is set at the Primary Office level.

Allow Caregiver In-Service and Visit Overlaps

When scheduling a Caregiver, the **Caregiver In-Service** and **Visit Overlaps Validation** setting is based on the Caregiver's Primary Office.

Exclusion List

The Caregiver Exclusion List runs based on the Caregiver's Primary Office. Even if a Caregiver is assigned to a Secondary Office, the system only includes Caregivers when processing Exclusion List checks for the Primary Office.

Patient Pages

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

The following sections apply to functions applicable to Patient pages which may be affected by the functionality.

Patient General Page

Nurse Field

Nursing Caregivers can be assigned to multiple offices. The dropdown menu shows all nurses whose Profile is configured with the Patient's Office (for both Primary and Secondary Offices). The **Caregiver Code** and **Office Code** is seen along with the Nurse's name.

This also applies when selecting a Nurse via the *MD Order/Interim Order* pages under the *Clinical* section.

Caregiver with Access to Patient Info on Mobile App

This dropdown menu displays any Caregiver assigned to a Patient's Office, (either Primary or Secondary Office) who are configured with the Mobile App.

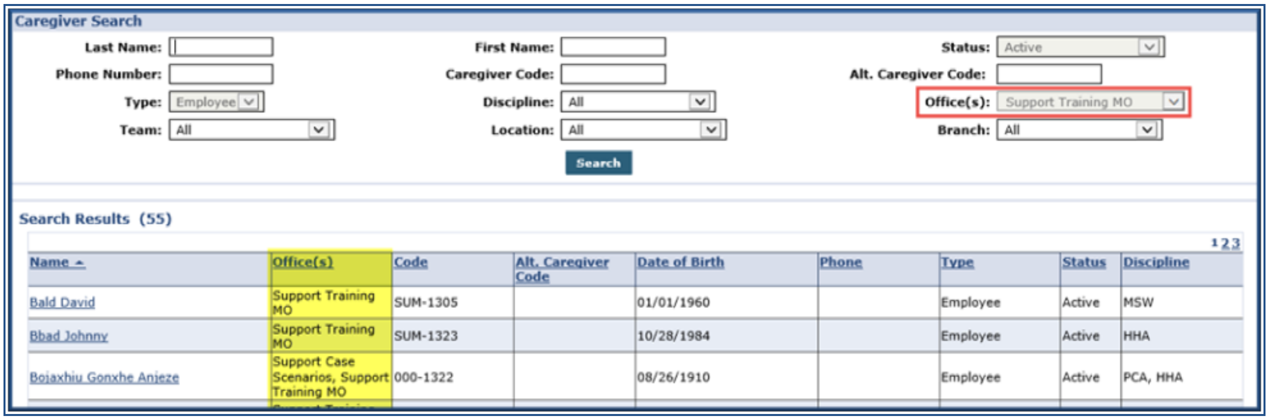
Notes for Internal Patient

Users are limited to selecting Caregivers whose Primary Office matches Patient's Office. To enter Notes in a Caregiver's Secondary Office, enter the notes in the Caregiver's Profile (separate from the Patient's).

Patient Master Week Page

Caregivers assigned to a Patient's Office (either Primary or Secondary) can be selected in a Patient's Master Week. When performing a Caregiver Search, the results generated shows all Caregivers who match the filter selection(s). The **Office** field defaults to the Patient Office (un-editable).

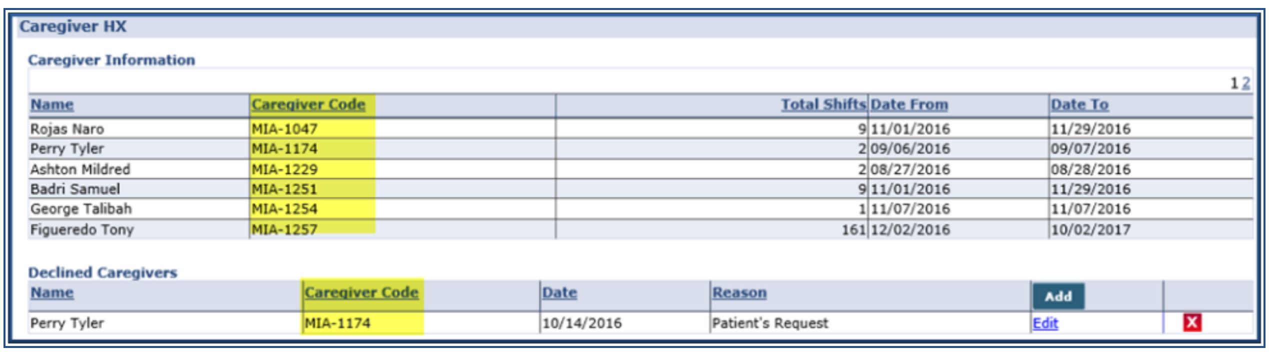
The **Office(s)** column shows the Primary first, followed by Secondary Offices. This is the same screen when clicking the (?) link to search for all scheduling pages on the Patient Profile and throughout the system.



Caregiver Search Screen

Caregiver HX

A column for **Caregiver Code** is available in the Caregiver History page. This column is also displayed in the *Declined Caregiver* section on the same page. To mark a Caregiver as declined, perform a Caregiver Search. The results generated show any Caregiver whose Offices (Primary or Secondary) match the Patient Office.



Caregiver History Page

Other System Pages

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

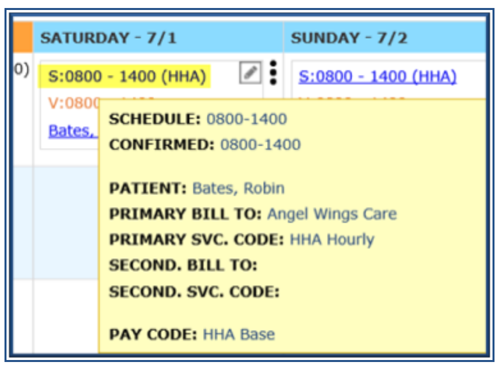
Visit Module: Appointments

On the ***Visit > Appointments*** page (Caregiver view) the **Office** field is required. When searching, the results generated show the Caregivers who are assigned to the selected Office (whether Primary or Secondary).

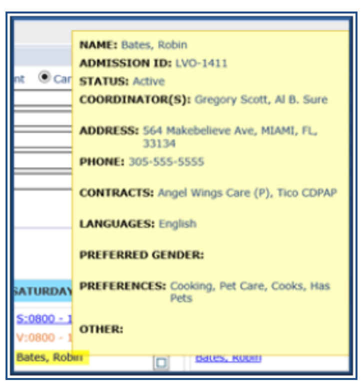
User Access

User access in the *Appointments* page is controlled by the user permissions settings in either the Caregiver's Primary Office or the Patient Office (for individual visits). Users who can view the results are also able to see all items scheduled for the Caregiver. If the Caregiver has visits scheduled at a different Office from the Office selected, the **Office Code** is indicated after the Patient Name.

Hovering over either the Caregiver's Name or Patient's Name displays visit details.



Hovering Over Scheduled Time



Hovering Over the Patient Name

Visit Functions in Different Offices

User access in the *Appointments* page for different Offices is controlled by the user permissions settings in the Patient Office. For example, a Caregiver is assigned to **Office 1 (Primary)** and **Office 2 (Secondary)**, and the user has permissions at Office 1, but not for Office 2. When searching on the *Appointments* page, the results show Caregiver appointments for Office 1 and 2.

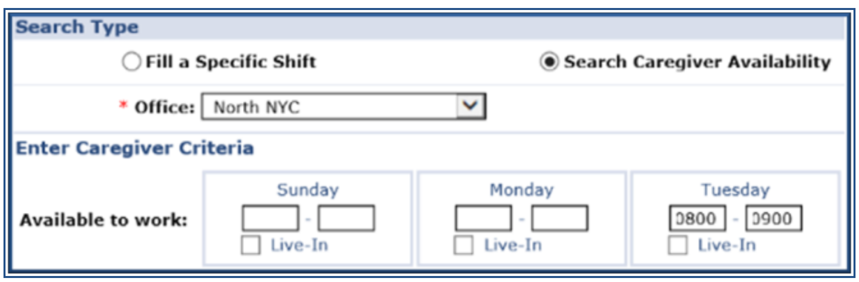
When clicking on the hyperlinked Scheduled Time for a visit in Office 2, the user can only view the appointment.

Bulk Update Function

The **Bulk Update** function only works if the selected visits are in the same Office; therefore, the system does not allow users to select visits from multiple offices. Selecting multiple visits from one Office enables the Bulk Update function provided that the user has access to the selected Office.

Action Module: Availability

From the *Caregiver Availability Search* page, the **Office** field is required. As a result, a Caregiver appears if they are assigned to that specific Office (as a Primary or Secondary).



Caregiver Availability Search

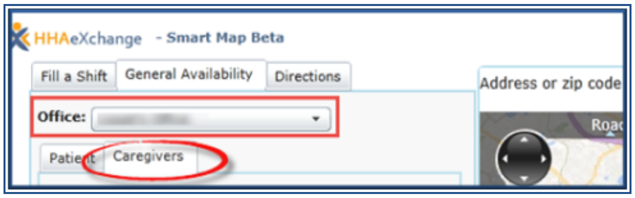
Available to Work filters pull information from the Caregiver's Availability page, with details from all assigned Offices whether the Primary or Secondary Office is selected.

Certain fields on the *Availability* page are Office-specific such as **Team**, **Location**, **Branch**, and **Caregiver Requirements** for scheduling. Even if a Caregiver is assigned to a Secondary Office, the ruling configurations remain in the Primary Office.

If any of the Office-specific fields are selected, then the results do not yield Caregivers set at Secondary Offices; only those who match other filters are listed.

Action Module: Smart Map Beta

Generating a Caregiver Search via the Smart Map Beta results in a list of Caregivers who are configured to a selected Office (Primary or Secondary). If the selected Office is a Caregiver's Secondary and no Office-specific filters are selected, then the Caregiver is excluded from the search.



Smart Map Beta: Caregiver Search

Action Module: Confirm Visits

Search and select a Caregiver by clicking on the ***Schedule*** radio button on the ***Action > Confirm Visits*** page. The Caregiver search results return Caregivers assigned to both Primary and Secondary Office selections.

Action Module: Confirm Timesheets

On the *Confirm Timesheets* page, select a single **Office** to confirm timesheets for Caregivers associated to the selected Office (whether Primary or Secondary). On the same screen, enter the Caregiver Name or Code in the **Caregiver Name/Code** field (auto-populates as entered) and select the **Week Ending Date**.

The system validates the **Week-Ending Date** based on the selected week for the selected Office. The **Patient** field shows Patients for which selected Caregivers have been assigned to (based on Patient Office).

Confirm Timesheet Screen

Action Module: Conflict Report

Caregivers who work for multiple Offices may encounter conflicts at different Offices. Use the Conflict Report page to search for any Conflict at the Caregiver's Office(s). The results show any encountered Conflicts based on the Caregiver's assigned Offices.

Example	Scenario
1	A Caregiver is assigned to **Office 1 (Primary)** and **Office 2 (Secondary)**. The Caregiver

	has an overlap with Agency B on a visit scheduled with an Office 2 Patient. On the Conflict Report, Office 2 appears under the "Office" column, where the conflict occurred.
2	A Caregiver is assigned to **Office 1 (Primary)** and **Office 2 (Secondary)**. The Caregiver has an overlap with Agency A on a visit scheduled with an Office 2 (Agency A) Patient. On the Conflict Report, Office 2 (Agency A) displays as the Conflict Agency.

The following example demonstrates multiple scenarios and how they manifest on a Conflict Report.

Example Assumptions		
Caregiver	**Agency**	**Assigned Offices**
1	**A**	Office 1 (Primary), Office 2 (Secondary)
2	**B**	Office 3 (Primary), Office 4 (Secondary)
3	**A**	Office 5 (Primary), Office 6 (Secondary)
All Caregivers have the same SSN and Date of Birth.		

Agency to Agency Conflict

Billed visits for Caregiver 1 from Agency A (Office 1, Primary) and Caregiver 2 from Agency B (Office 4, Secondary);

- If user, logged in Agency A, runs a report, the Conflict Report indicates **Office Column: O1** and **Conflict Agency: Agency B (O4).**

Office to Office Conflict Across Agency

Billed visits for Caregiver 1 from Agency A (Office 1, Primary) and Caregiver 3 from Agency A (Office 6, Secondary) is billed for a visit.

- If user, logged in Agency A, runs a report, the Conflict Report indicates **Office Column: O1** and **Conflict Agency: Agency A (O6).**

Action Module: Overtime Dashboard

A Caregiver's overtime (OT) values are tracked via their Primary Office on the Overtime Dashboard. On the **Detail View**, visits are listed with respective 3-character Office Codes indicated next to the Patient's name. Editing rights are governed at the Caregiver's Primary Office. To make any changes from this page click on the Patient Name (hyperlink).

P: MCGRAW, KIM **Cont:** Senior Health Partners **Coor:** Edward Quansah **SH/CH:** 8:00/08:03	**P:** Moore, Julie (NYC) **Cont:** Senior Health Partners **Coor:** Edward Quansah **SH/CH:** 8:00/07:56	**P:** Moore, Julie, (NYC) **Cont:** Senior Health Partners **Coor:** Edward Quansah **SH/CH:** 8:00/08:04	**P:** MCGRAW, KIM **Cont:** Senior Health Partners **Coor:** Edward Quansah **SH/CH:** 8:00/08:06

Overtime Dashboard: Detail View

Action Module: Travel Time

Travel Time records are generated according to the Caregiver's Primary Office. From the ***Action > Travel Time*** page, select an **Office** from the required dropdown field to run a search. The system returns all potential Travel Time trips for a Caregiver's Primary Office or any other selected Office.

Action Module: Payroll

When processing payroll, all hours for Visits, In-Services, Expense, and Travel Time are organized and governed by the Caregiver's Primary Office (regardless of the Office in which services were performed).

On the *Payroll Details* page, all records are shown as combined. The Patient Number includes the Office Code for users to identify when Secondary Office(s) records have been added. Only users with access to a Patient's Office can click on Patient Name link to view a Patient's Profile.

Combined payroll records are also available in the **Payroll Batch Details** page and **Caregiver Paychecks** section.

Previous Week (12/04/2016 - 12/10/2016) [With OT]

Visit Date	Visit/ Expense	Patient Number	Patient Name	Reg Hrs
12/07/2016	0300-0315	NYC-10001	Doe, John	00:15
12/08/2016	0600-0700	NYC-10001	Doe, John	01:00
12/07/2016	0300-0315	ABC-12345	Smith, Sally	00:15
12/08/2016	0600-0700	ABC-12345	Smith, Sally	01:00
Week Total:				02:30

Payroll Details Page

Call Dashboard: Call Maintenance

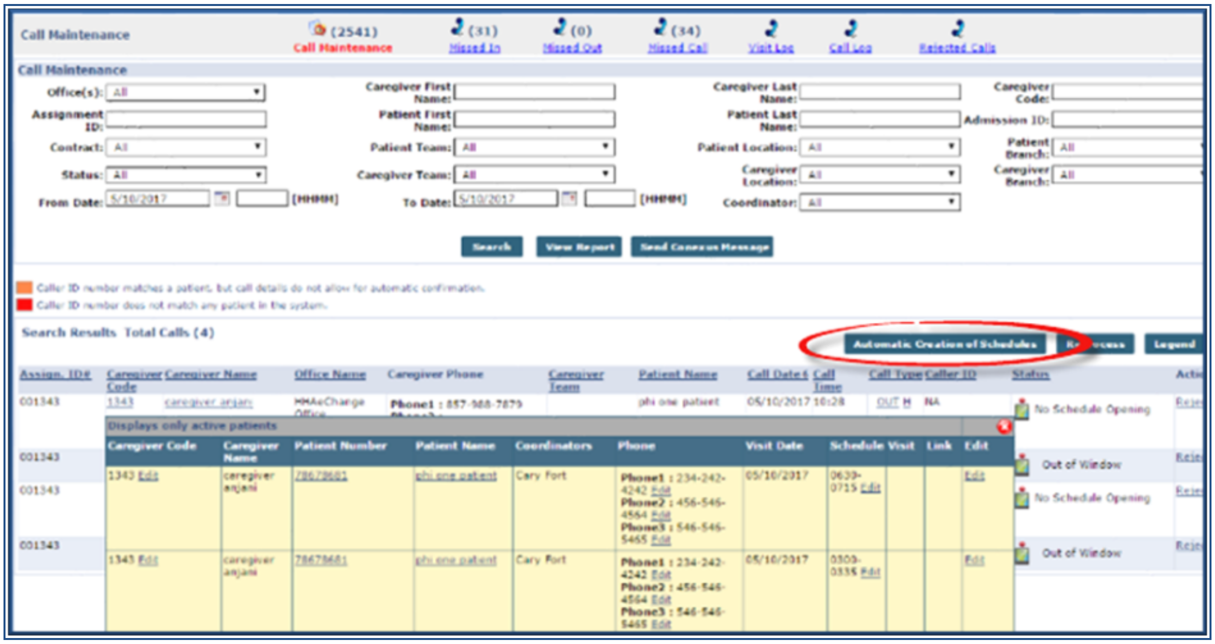
Call Maintenance adjusts to include Caregivers' Primary and Secondary Offices according to selected search fields. As a result, Offices are shown under the **Office Name** column, Primary followed by Secondary Offices. Caregivers for the chosen criteria show in a search result.

Users with Secondary Office access can perform several functions by way of an associated Patient Office, as follows:

- View and Edit Caregiver Schedules (Primary and Secondary)
- Edit Caregiver
- Link Visits
- Link Call with Schedule

- Create New Schedule
- Edit Schedule for Secondary Office (Patient Office)
- View a Patient Calendar (by clicking on Patient Name)
- Edit Patient Phone Number for Secondary Office

Functions for visits listed on the window can be restricted for users with limited access.



Call Maintenance Dashboard Caregiver Search

Note: From the Call Maintenance page, click the Automatic Creation of Schedules button page (as shown on the image above) and search for Offices using the dropdown filter. Results are based on a Patient Office on record, regardless of a Caregiver's assigned offices (Primary or Secondary).

Other Call Dashboard Functions

Other Call Dashboard functions accommodate to the Caregiver's multi-office purpose. Filter searches by **Office** and the results show a Caregiver's Primary and Secondary Office as per selected criteria. Such functions include:

- Reprocess
- Missed In/Out/ Calls
- Visit Log
- Call Log
- Rejected Calls: This panel includes a Caregiver's Secondary Office Calls. The search results display all Caregiver calls from the selected Primary and Secondary Offices.

User Permissions for Caregiver Multi-Office

The following table contains user permissions that apply to the Caregiver Multi-Office functionality. To access these permissions, navigate to ***Admin > User Management > Edit Roles*** and select a **Section** from the dropdown menu (example: *Patient)*.

Permissions	Section	Description The system checks permissions for...
AideComplianceEdit	Aide	Editing permissions - Users with permissions to the Primary Office can *add*, *edit*, *upload*, and *delete* on the Caregiver's Compliance page.
EditNonSkilledSchedule **EditNonSkilledVisit**	Patient	Internal and Payer Patients when a user clicks on **Visit Confirmation Times** for Non-Skilled visits
EditSkilledSchedule **EditSkilledVisit**	Patient	Internal and Payer Patients when a user clicks on **Visit Confirmation Times** for Skilled visits
Edit Travel Time (Menu)	Action	Caregiver's Primary Office field permissions. If user does not have permission at a Primary Office level, then only the **Notes** field can be changed.
EditAideNote	Aide	Adding a Note to a Caregiver's profile
EditAideAbsences	Aide	Add/Record a Caregiver's Absence
AideRestrictionsEdit	Aide	Add/Edit Caregiver Restrictions
EditAvailability	Aide	Allows users to edit a Caregiver's Availability options.
EditExpenseDetails	Aide	Add/Edit/Delete Caregiver's reported expenses
EditDocumentManagement	Aide	New permission allowing users to Add/Edit/Delete/Upload Caregiver documents
Can Override OT Limit	N/A	Allows user to override overtime limits. This permission set in the *Update User Account* page (***Admin > User Management***).
Secondary Office Patient Search	Patient	Provides role permissions to generate Patient searches according to assigned Caregiver.