



# Case Broadcasting Process Guide

User Guide

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# Case Broadcasting

## Overview

The **Case Broadcasting** functionality enables Coordinators to set Broadcasts of a single visit (Single shift) or a Master Week (Permanent shift) to their Agency’s Caregivers. Caregivers see these Broadcasts on their Mobile App where they can view and “thumbs up” (express interest) or “thumbs down” (uninterested) to open work shifts, as seen in the following image.



**Broadcasted Shifts on Mobile App**

- When ***interested*** in an open shift (thumbs up), the request is logged in Enterprise and sent to the Broadcast Dashboard for further assignment by the Coordinator.
- When ***uninterested*** in an open shift (thumbs down), the open shift no longer displays on the Caregiver’s Mobile app and Enterprise application.

Coordinators sort through past Broadcasts and Caregiver requests, and either revoke or rebroadcast a past broadcast; ***or*** assigns or rejects the Caregiver’s requests.

This process guide covers the **Case Broadcasting** functionality in the HHAExchange (HHAX) system. For further guidance and instructions, refer to the [Mobile App Case Broadcasting topic](#).

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
<b>Patient</b>	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
<b>Caregiver</b>	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.



## The *Enterprise System*

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<b>Provider</b>	Refers to the Agency or organization coordinating services.
<b>Payer</b>	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
<b>HHAX</b>	Acronym for HHAeXchange

# Broadcast Dashboard

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

The **Broadcast Dashboard** page in the system is where a Coordinator reconciles all existing requests, sorted by visit. This page loads based on a set of search filters (such as the Visit Search page).

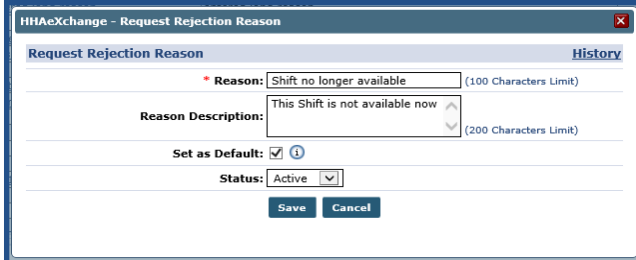
Each broadcasted visit lists every Caregiver who has requested visits. From this page, a Coordinator can:

1. **Assign a Request** – Assigns the shift to a Caregiver and all other requests for the shift are rejected; OR
2. **Reject the Request** – Provides a **Rejection Reason** which is sent to the rejected Caregiver(s).

Broadcast buttons are available in various locations throughout the system allowing users to perform a **Quick Broadcast** (sent to all Caregivers) or **Matching Caregivers** (sent to select/applicable Caregivers).

## Reference Table Management: Broadcast Reject Reason

A **Broadcast Reject Reason** dropdown is available via the Reference Table Management functionality to create and manage Broadcast Rejection Reason on Open shifts.



Creating a Request Rejection Reason

The Reject **Reason** is required and at least one reason must be selected as default. If only one reason exists, it is automatically selected. Once a default reason is set, this reason is the automatic response sent from the system for rejected cases.

If a case has been assigned, then all remaining requests for that visit are automatically rejected. If a Coordinator chooses to reject each request individually, other reasons can be selected (as created in the Reference Table). The Reference Table search page indicates which rejection reason is the default indicating “Yes” under the **Default** column, as illustrated in the following image.

Reference Table Management

Search  
Reference Table:  Search Legend

Search Results (20) Add

Page 1 of 1

Reason ID	Reason	Reason Description	Default	Status
2	Shift no longer available	This Shift is not available now	Yes	Active
3	Broadcast Rejection Reasons	This is for test purpose	No	Active
4	test test	This is test	No	Active
80	test 123	fasdfasfas tghdfghdfg fghjghjf drghd	No	Active
81	Patient Preferred	Patient requested a preferred Caregiver Type	No	Active

Reference Table Management: Broadcast Reject Reason

Navigate to **Action > Broadcast Dashboard** to access the dashboard. The Broadcast Dashboard is divided in two views according to selected radio button (either *Single Shifts* or *Master Week*).

## Single Shifts View

The image below illustrates a **Single Shift** view, providing search filters associated with single shifts.

The following criteria apply to the results on this dashboard:

- Broadcast is not Revoked
- Visit Date is Current or Future Date
- Visit is not Confirmed
- Visit is not Billed

Broadcast Dashboard

Enterprise 9.2.1.0 TELXQUATD01 (MSIE 10.0) IE 11 (Doc IE 10) 1/19 06:13 ES

Shift Requests

View By:  Single Shifts  Master Weeks

Office(s):  Coordinator:  Contract:

Status:  Patient Name:  Team:  Location:

Branch:  Visit From:  Visit To:  Discipline:

Search

Search Results Total Open Shifts: 44 Total Shift Requests: 3 Page 1 of 2 | Next Last

Date	Patient	Coordinator	Visit	Discipline	Contract	Address	Phone	Status
<input type="checkbox"/>	02/21/2018 98052016_Patient	Ram Lakhan	0500-0700	RN		302 Olive Arcade1, CG Road1, NEW YORK1, N Y, 10032	111-222-1111	Requests No Requests
<input type="checkbox"/>	02/11/2018 98052016_Patient	Ram Lakhan	0500-0600	HHA		302 Olive Arcade1, CG Road1, NEW YORK1, N Y, 10032	111-222-1111	Requests Requested
		<b>Caregiver</b>	<b>Requested</b>	<b>Employment Type</b>	<b>Hours</b>	<b>Address</b>	<b>Phone</b>	<b>Assign</b> <b>Reject</b>
			01/04/2018 12:28	HHA	00:00	Greenville near US hospital, Near U, Lan dmark near Gala Residencev, stre, ALAM O, TN, 38001	000-111-2222	Preferences <input type="button" value="Assign"/> <input type="button" value="Reject"/>
<input type="checkbox"/>	02/10/2018 98052016_Patient	Ram Lakhan	0400-0530	HHA		302 Olive Arcade1, CG Road1, NEW YORK1, N Y, 10032	111-222-1111	Requests Requested
		<b>Caregiver</b>	<b>Requested</b>	<b>Employment Type</b>	<b>Hours</b>	<b>Address</b>	<b>Phone</b>	<b>Assign</b> <b>Reject</b>
			01/01/2018 04:22	RN, PT, OT	00:00	long address 123456 to tst UI abcde, //lo ng address 123456 to tst UI abc, mahara shtra, KY, 41101	565-645-6464	Preferences <input type="button" value="Assign"/> <input type="button" value="Reject"/>
			01/04/2018 12:28	HHA	00:00	Greenville near US hospital, Near U, Lan dmark near Gala Residencev, stre, ALAM O, TN, 38001	000-111-2222	Preferences <input type="button" value="Assign"/> <input type="button" value="Reject"/>

Broadcast Dashboard: Single Shift View

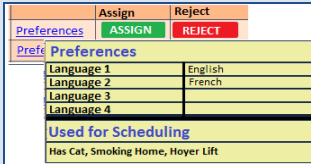
Above the results grid, the system summarizes and provides the **Total (Number) of Open Shifts** and the **Total (Number) of Shift Requests**. Each line item contains information as described in the following table (one row, per Patient, per Open Shift).

Column	Description																					
<b>Expand/Collapse</b>	Click the + / - box to expand or collapse shift details.																					
<b>Date of Broadcast</b>	The date of the shift.																					
<b>Patient</b>	Patient Name. Click hyperlink to access a summary popup and to navigate to the Patient Calendar.																					
<b>Coordinator</b>	Patient Coordinator																					
<b>Visit</b>	Visit scheduled time. Click hyperlink to access the <i>Visit Edit</i> details popup.																					
<b>Discipline</b>	Discipline of the Service Code scheduled.																					
<b>Contract</b>	Primary Contract for the visit.																					
<b>Address</b>	Patient's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.																					
<b>Phone</b>	Patient's Home Phone. Click on the hyperlink to show additional phone numbers for the Patient to include Emergency Contact. <table border="1" data-bbox="802 947 1149 1083"> <thead> <tr> <th>Phone</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>555-555-5555</td> <td>Additional Numbers</td> </tr> <tr> <td>123-456-7890</td> <td>Patient Phone 2 555-555-5555 REJECT</td> </tr> <tr> <td>242-292-2215</td> <td>Patient Phone 3 555-555-5555 REJECT</td> </tr> <tr> <td></td> <td>Emergency Phone 1 325-236-3263 REJECT</td> </tr> <tr> <td></td> <td>Emergency Phone 2 236-236-2362 REJECT</td> </tr> <tr> <td></td> <td>Emergency Phone 3</td> </tr> <tr> <td></td> <td>Emergency Phone 4</td> </tr> </tbody> </table>	Phone	Status	555-555-5555	Additional Numbers	123-456-7890	Patient Phone 2 555-555-5555 REJECT	242-292-2215	Patient Phone 3 555-555-5555 REJECT		Emergency Phone 1 325-236-3263 REJECT		Emergency Phone 2 236-236-2362 REJECT		Emergency Phone 3		Emergency Phone 4					
Phone	Status																					
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123-456-7890	Patient Phone 2 555-555-5555 REJECT																					
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	Emergency Phone 2 236-236-2362 REJECT																					
	Emergency Phone 3																					
	Emergency Phone 4																					
<b>Requests</b>	Hover over the Requests hyperlink to access Patient Preferences to include Primary and Secondary Language, Preferred Gender, and other preferences. Click on the hyperlink to access the Caregiver's Preferences. <table border="1" data-bbox="802 1230 1149 1392"> <thead> <tr> <th>Phone</th> <th>Requests</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>555-555-5555</td> <td>Requests</td> <td>Requested</td> </tr> <tr> <td>123-456-7890</td> <td>Primary Language</td> <td>English</td> </tr> <tr> <td>242-292-2215</td> <td>Secondary Language</td> <td>French</td> </tr> <tr> <td></td> <td>Preferred Gender</td> <td>Female</td> </tr> <tr> <td></td> <td>Used for Scheduling</td> <td></td> </tr> <tr> <td></td> <td>Has Cat, Smoking Home, Hoyer Lift</td> <td></td> </tr> </tbody> </table>	Phone	Requests	Status	555-555-5555	Requests	Requested	123-456-7890	Primary Language	English	242-292-2215	Secondary Language	French		Preferred Gender	Female		Used for Scheduling			Has Cat, Smoking Home, Hoyer Lift	
Phone	Requests	Status																				
555-555-5555	Requests	Requested																				
123-456-7890	Primary Language	English																				
242-292-2215	Secondary Language	French																				
	Preferred Gender	Female																				
	Used for Scheduling																					
	Has Cat, Smoking Home, Hoyer Lift																					
<b>Status</b>	Indicates the Status of the Open Shift: <ul style="list-style-type: none"> <li><b>Requested:</b> At least one Caregiver has requested the shift.</li> <li><b>No Requests:</b> No Caregiver has requested the shift.</li> </ul>																					

If a Caregiver has requested an Open Shift, the records are illustrated underneath the Open Shift. Click the + / - box to expand/collapse the details. Each line item is described in the table underneath the image.

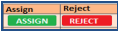
Search Results										Total Open Shifts: 3		Total Shift Requests: 2		Page 1 of 330		Next Last		
Date	Patient	Coordinator	Visit	Discipline	Contract	Address	Phone	Requests	Status									
01/03/2016	Allen, Kenneth	Sandra Jones	0800 - 1400	HHA	Senior Health Partners	123 Fake Street, Trenton, NJ, 11215	555-555-5555	Requests	Requested									
										<input checked="" type="checkbox"/> Caregiver	Requested	Employment Type	Hours	Address	Phone	Preferences	Assign	Reject
										Smith, Jane (10034)	1/19/2016 10:23	HHA, HSK	32:00	55-22 3rd Avenue, Princeton, NJ, 11215	123-456-7890	Preferences	ASSIGN	REJECT
										Andrews, Tina (1002)	1/19/2016 14:15	HHA	00:00	112 Richard Lane, Hamilton, NJ, 11381	242-292-2215	Preferences	ASSIGN	REJECT

### Caregiver Requested Open Shift

Column	Description
Expand/Collapse	Click the + / - box to expand or collapse shift details.
Caregiver	Name of the Caregiver and Code (in parentheses) requesting the shift. Click hyperlink to access the Caregiver's Profile popup.
Requested	The Date and Time the Caregiver submitted the request.
Employment Type	Caregiver disciplines as noted in the system.
Hours	The Caregiver's hours for the Payroll Week of the selected date. The system uses the Weekly Hours which are shown on the Caregiver's Calendar. This value varies depending on the date of the Open Shift.
Address	Caregiver's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.
Phone	Caregiver's Home Phone. Click on the hyperlink to show additional phone numbers for the Caregiver to include Emergency Contact.
Preferences	<p>Hover over the Preferences hyperlink to access Caregiver Preferences to include Languages and other preferences. Click on the hyperlink to access the Caregiver's Preferences.</p> 
Assign / Reject	Each row has an <b>Assign</b> (green) and <b>Reject</b> (red) button for Coordinators to assign Open Shifts. To assign or reject a shift, users must have <i>Edit Schedule</i> permissions.

**Note:** These line descriptions also apply to Master Weeks view.

## Assigning a Shift Request

When selecting , the system attempts to match all Broadcast criteria with the Caregivers who have requested the shift. If a Caregiver Request does not match the Broadcast, the system generates a message informing the user of the mismatch. On the confirmation:

- Select the **OK** (button) to open the *Edit Visit* window.
- Select the **Cancel** (button) and the system closes the confirmation window and returns user to the *Broadcast Dashboard* with no action taken.

The *Visit* window opens to the Visit Schedule tab with the selected Caregiver. The Broadcast icon appears unavailable and the schedule **Start Time**, **End Time**, and **Caregiver** fields are un-editable. Click the **Save** button to proceed.


If the Caregiver is scheduled successfully (**Assigned**), then the system sends a confirmation to the Caregiver via the Mobile App with the visit details (Date, Times, Address, etc.). The system then rejects all



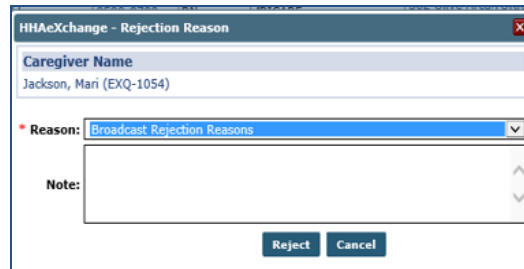
other requests with the Default Reject Reason and returns user to the Shift Request page. The Accept shift is removed from the Open Shifts.

**Note:** The system does not save if the Caregiver cannot be scheduled or if Cancel is selected which routes the user back to the Shift Request page.

## Rejecting a Shift Request

When selecting , the selected row is removed, and the Rejection Reason window opens. If all rows are rejected, then the Caregiver Requests grid is removed and the Status switches to “No Requests.”

Once a Patient visit begins, a rejection message is automatically issued to all Caregivers who have requested this visit, with the default Rejection Reason (such as “Shift no longer available”), as illustrated in the image to the right.



Rejection Reason window

## Master Weeks View

The image below illustrates a **Master Weeks** view, providing search filters associated with Master Week shifts. The following criteria apply to the results on this dashboard:

- Broadcast is not Revoked
- End Date of Master week is either blank, Current Date or Future Date.

**Shift Requests**

View By:  Single Shifts  Master Weeks

Status: All | Office: All | Coordinator: All | Contract: All

Branch: All | Patient Name: | Team: All | Location: All

Start Date From: | Start Date To: | Discipline: All

[Search](#)

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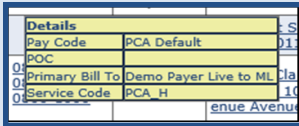
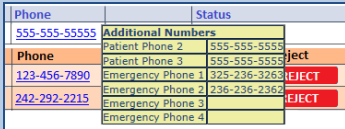
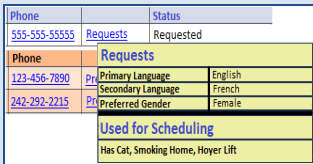
**Search Results**    Total Open Master Weeks: 3    Total Master Week Requests: 2    Page 1 of 330 | [Next Last](#)

Date	Patient	Coordinator	Visit	Discipline	Primary Payer	Contract	Address	Phone	Status	
04/01/2017 - 04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400	W:0800 - 1400	HHA, HSK, HMK	Bergen	Senior Health Partners 123 Fake Street, Trenton, NJ, 11215	555-555-5555	Requests	Requested
		<b>Caregiver</b>		<b>Requested</b>	<b>Employment Type</b>	<b>Master Week Hours</b>	<b>Address</b>	<b>Phone</b>	<b>Preferences</b>	<b>Assign</b> <b>Reject</b>
		Smith, Jane (10034)		1/19/2016 10:23	HHA, HSK, HMK	32:00	55-22 3rd Avenue, Princeton, NJ, 11215	123-456-7890		<input type="button" value="ASSIGN"/> <input type="button" value="REJECT"/>
		Andrews, Tina (1002)		1/19/2016 14:15	HHA, HSK, HMK	00:00	112 Richard Lane, Hamilton, NJ, 11381	242-292-2215		<input type="button" value="ASSIGN"/> <input type="button" value="REJECT"/>
04/01/2017 - 04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400	W:0800 - 1400	HHA	Manhattan Partners	Senior Health Partners 123 Fake Street, Trenton, NJ, 11215	555-555-5555	Requests	No Requests
04/01/2017 - 04/11/2017	Jones, William	Randy March	M:0800 - 1400	W:0800 - 1400	PCA, HMK	Bergen	Guildnet 762 Flower Lane, Lawrenceville, NJ, 08648	245-135-1315	Requests	No Requests

Broadcast Dashboard: Master Weeks View

Above the results grid, the system summarizes and provides the **Total (Number) of Open Master Weeks** and the **Total (Number) of Master Week Requests**.

Each line item contains information as described in the following table.

Column	Description
<b>Date</b>	The Master Week date range.
<b>Patient</b>	Patient Name. Click hyperlink to access a summary popup and to navigate to the Patient Calendar.
<b>Coordinator</b>	Patient Coordinator
<b>Visit</b>	Scheduled Master Week visits. Hovering over the details provides a quick-glance view (such as <b>Pay Code</b> , <b>POC</b> , <b>Primary Bill To</b> and <b>Service Code</b> ). 
<b>Discipline</b>	Disciplines based on the Service Code scheduled on all Master Week shifts.
<b>Primary Payer</b>	Primary Payer for the visit.
<b>Contract</b>	Primary Contract for the visit.
<b>Address</b>	Patient's Address. Click hyperlink to open the popup and navigate to Google Maps for this location.
<b>Phone</b>	Patient's Home Phone. Click on the hyperlink to show additional phone numbers for the Patient to include Emergency Contact. 
<b>Requests</b>	Hover over the Requests hyperlink to access Patient Preferences to include Primary and Secondary Language, Preferred Gender, and other preferences. Click on the hyperlink to access the Caregiver's Preferences. 
<b>Status</b>	Indicates the Status of the Open Master Week: <ul style="list-style-type: none"> <li><b>Requested:</b> At least one Caregiver has requested the shift.</li> <li><b>No Requests:</b> No Caregiver has requested the shift.</li> </ul>


Caregivers who have made a Master Week request are listed underneath the Open Master Week, as illustrated in the image below. Click the + / - box to expand/collapse the details. Refer to the Caregiver Single Shifts View table for the descriptions to each line item.

Search Results		Total Open Master Weeks: 3		Total Master Week Requests: 2				Page 1 of 330   Next Last									
Date	Patient	Coordinator	Visit	Discipline	Primary Payer	Contract	Address	Phone	Status								
04/01/2017 - 04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400 W:0800 - 1400	HHA, HSK, HMK	Bergen	Senior Health Partners	123 Fake Street, Trenton, NJ, 11215	555-555-5555	Requests	Requested							
		<b>Caregiver</b>		<b>Requested</b>		<b>Employment Type</b>		<b>Master Week Hours</b>		<b>Address</b>		<b>Phone</b>		<b>Assign</b>		<b>Reject</b>	
		Smith, Jane (10034)		1/19/2016 10:23		HHA, HSK, HMK		32:00		55-22 3rd Avenue, Princeton, NJ, 11215		123-456-7890		Preferences		ASSIGN REJECT	
		Andrews, Tina (1002)		1/19/2016 14:15		HHA, HSK, HMK		00:00		112 Richard Lane, Hamilton, NJ, 11381		242-292-2215		Preferences		ASSIGN REJECT	
04/01/2017 - 04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400 W:0800 - 1400	HHA	Manhattan Partners	Senior Health Partners	123 Fake Street, Trenton, NJ, 11215	555-555-5555	Requests	No Requests							
04/01/2017 - 04/11/2017	Jones, William	Randy March	M:0800 - 1400 W:0800 - 1400	PCA, HMK	Bergen	Guildnet	762 Flower Lane, Lawrenceville, NJ, 08648	245-135-1315	Requests	No Requests							

### Caregiver Requested Open Master Week

**Note:** The Caregiver's hours based on the current Master Week schedule. The system uses the existing Master Week Hours on the Caregiver's Master Week Report (navigate **Caregiver Profile > Calendar > Caregiver Master Week** link to view).

### Assigning a Master Week Request

When selecting , the system attempts to match all Broadcast criteria with the list of Caregivers who requested the Master Week shift. If a Caregiver Request does not match the Broadcast, the system generates a message informing the user of the mismatch. On the confirmation:

- Select the **OK** (button) to open the *Edit Master Week* window.
- Select the **Cancel** (button) and the system closes the confirmation window and returns user to the *Broadcast Dashboard* with no action taken.


The *Edit Master Week* window opens with the selected Caregiver. The Broadcast icon becomes unavailable and the schedule **Start Time**, **End Time**, **Caregiver**, the **Masterweek From** and **To Dates** as well as the *Copy Masterweek* link and *Hours* link are un-editable. Click the **Save** button to proceed.

If the Caregiver is scheduled successfully (**Assigned**), then the system applies a rollover of the same Master Week (based on the settings of the Master Week). The system sends a confirmation to the Caregiver via the Mobile App with the details (Date, Times, Address, etc.). The system then rejects all other requests with the Default Reject Reason and returns user to the Shift Request page. The Accept shift is removed from the Master Weeks Open Shifts.

If a Caregiver's Master Week Request is approved during a current Master Week shift, then the Caregiver is assigned to begin the assigned shift at the beginning of the next whole shift; partial shifts are never assigned.

**Note:** The system does not save if the Caregiver cannot be scheduled or if **Cancel** is selected which routes the user back to the Shift Request page.

### Rejecting a Master Week Request

When selecting , the selected row is removed, and the Rejection Reason window opens. If all rows are rejected, then the Caregiver Requests grid is removed and the Status switches to "No Requests."

Once a Master Week has ended, a rejection message is automatically issued to all Caregivers who have requested the Master Week, with the default Rejection Reason (such as "Shift no longer available").

# Office Setup

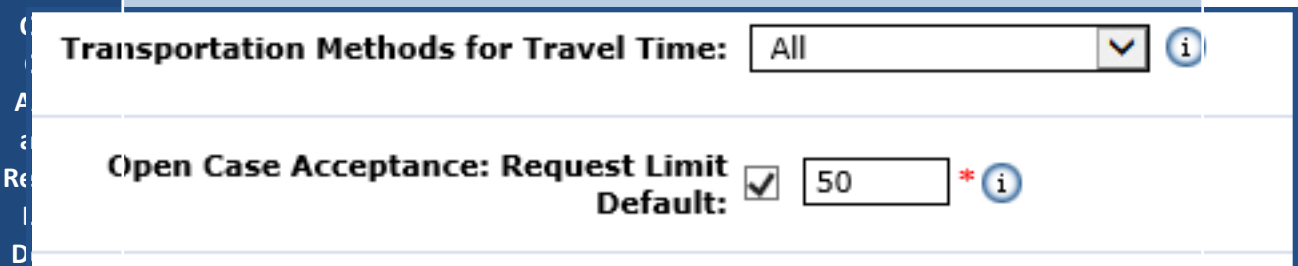
Navigate to **Admin > Office Setup** to access the settings and select the **Open Case Acceptance Caregiver Default** field, as shown in the image below.



Office Setup: Open Case Acceptance Settings

These settings determine the configuration for all new Caregivers who have a matching set of options on the Caregiver level, as described in the following table.

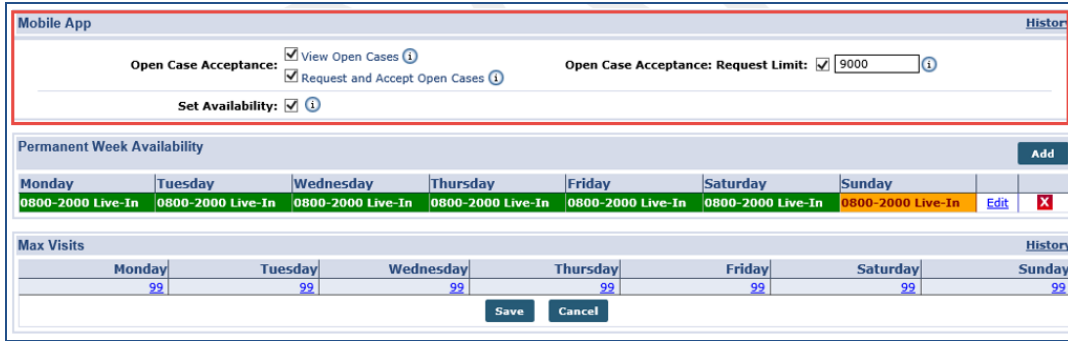
Field	Description (If selected...)
View Open Cases	Caregivers can see the section for <b>Open Cases</b> on their Caregiver Mobile App. <i>Note: Viewing open cases shows shift details to Caregivers. Request and Accept Open Cases must be selected to submit requests for these visits.</i>
Request and Accept Open Cases	Caregivers can request cases marked as <b>Open</b> via their Mobile App. Requesting and accepting <b>Open Cases</b> allows certain Caregivers to submit requests for broadcasted shifts which are available to them. <i>Note: If the View Open Cases is not enabled, then this option is not available.</i>
Open Case Acceptance: Request Limit Default	Once selected, this field requires a numeric value between 1 and 9999 representing the number of pending requests a Caregiver can have at one time. Cancelled, rejected, and approved requests do not count against this number.



If selected, Caregivers have a limit on how many Open Requests they can place with the Office before the function is disabled. The **Request and Accept Open Cases** must be selected for this option to be available.

# Caregiver Setup

To set up the Caregiver Mobile App in the system, navigate to **Caregiver > Availability** page, as illustrated in the image below. The Caregiver-level fields are populated based on the default settings in the Office Setup. These settings are adopted for any new Caregivers created in the system.



**Mobile App** History

Open Case Acceptance:  View Open Cases ⓘ      Open Case Acceptance: Request Limit:  9000 ⓘ

Request and Accept Open Cases ⓘ

Set Availability:  ⓘ

---

**Permanent Week Availability** Add

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday		
0800-2000 Live-In	0800-2000 Live-In	0800-2000 Live-In	0800-2000 Live-In	0800-2000 Live-In	0800-2000 Live-In	0800-2000 Live-In	Edit	X

---

**Max Visits** History

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
99	99	99	99	99	99	99

Save    Cancel

Caregiver Availability page: Mobile App Settings

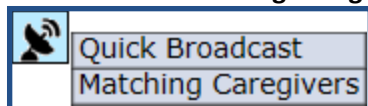
**Note:** Changes at the Office Setup does not impact existing Caregiver-level settings. Enabling the **Set Availability** field allows the Caregiver to set their availability via their Mobile App.

## Broadcasting

Broadcasting functions operate similar for Single Shifts and Master Weeks, although opportunity to Broadcast vary slightly. While Single Shifts have the broadcasting functionality available throughout the system, a Master Week has the Broadcasting functionality only on the editing page.



Selecting the **Broadcasting** icon (as illustrated on top, right) provides the options to either **Quick Broadcast** or select **Matching Caregivers**. (as illustrated on the bottom-right).



The following conditions must be met for the Broadcast icon to be available:

<b>Single Shifts</b>	<ul style="list-style-type: none"> <li>User has the “Broadcast Open Case” permission enabled</li> <li>Visit date must be either the Current Date or Future Date only</li> <li>Visit is not Confirmed</li> <li>Visit is not Billed</li> </ul>
<b>Master Week</b>	<ul style="list-style-type: none"> <li>User has the “Broadcast Open Case” permission enabled</li> <li>The Master Week End date is not a past date. Either the Master Week’s End Date is Blank, with Current or Future Date only.</li> </ul>

When attempting to create a Broadcast for a previously broadcasted shift (duplicate), the system alerts that the same shift has already been created by another user. In this case, refresh the page and create another broadcast for a different shift.

# Master Week Broadcasting

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

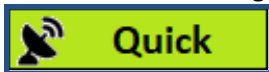
Broadcast a Master Week by way of the edit (**Hours**) link, as indicated on the following image.

Master Week Broadcasting

When selecting the **Quick Broadcast** option, the *Quick Broadcast* window opens prompting the user to create a note (such as Open Shift information) and click the **Broadcast** button to broadcast the visit.

Quick Broadcast window

Once the Broadcast is issued, the **Quick** icon turns green indicating that the Broadcast is live. The Broadcast is issued to Caregivers who meet the following criteria:



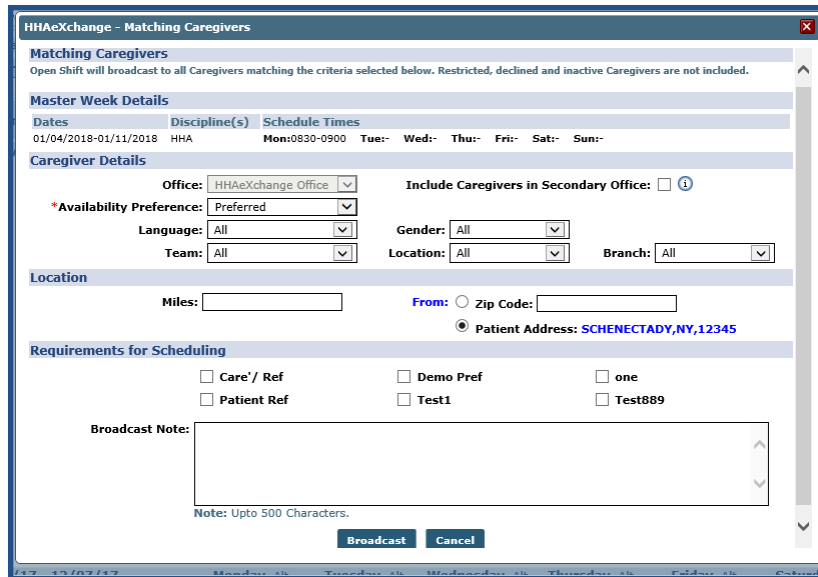
- Enabled to View Open Cases
- Matches the Patient’s Primary Office
- Matches all Master Week disciplines (such as HHA and/or PCA). Only Caregivers having required disciplines selected on their Caregiver Profile can see this Broadcast.
- Are not listed as **Restricted** (shift Contract), **Declined** (shift Patient), or has an **Inactive** profile.

**Note:** Caregivers added or updated to match criteria after broadcast still see matching cases.

If **Matching Caregivers** is selected, the *Matching Caregivers* window populates as illustrated in the image below. From here, select scheduling requirements or preferences as per available fields (such as **Language, Gender** or **Location**). The criteria listed above applies for this option as well.

The **Availability Preference** field (denoted with a red asterisk) is required for Broadcasting with this option. The default selection is *Preferred*, however, other options such as *Might Work*, or *Do not factor in availability* can be selected.

Once complete, click the **Broadcast** button.



**Matching Caregivers window**

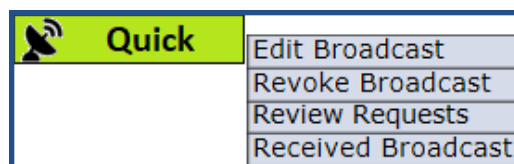
**Note:** The system filters any selected criteria (such as **Team, Branch, Miles**) to match Caregiver database.

Once the Broadcast is issued, the **Matching** icon turns green indicating that the Broadcast is live.

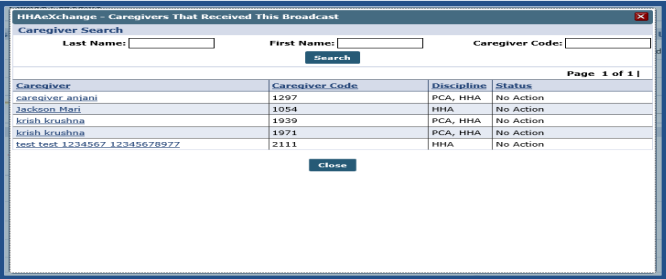


## Options After Broadcast

The green **Quick** and **Matching** buttons are selectable once a Broadcast has been issued providing the user with options as illustrated to the right and described in the table below.





Option	Description (If selected...)
<b>Edit Broadcast</b>	Allows the Coordinator to edit the Broadcast using the Matching Caregivers window.
<b>Revoke Broadcast</b>	Removes the Broadcast from all Mobile Apps, whether Caregivers have seen or requested the case. The Coordinator is prompted to confirm the revocation.
<b>Review Requests</b>	Opens the <b>Broadcast Dashboard</b> to the Requests tab prompting a search generating only the requests for this Master Week.
<b>Received Broadcast</b>	<p>The <b>Caregivers That Received This Broadcast</b> popup window lists all Caregivers who gave the shift a “thumbs up” to request the case (shift) on their Mobile App.</p> <p>Selecting the <b>Caregiver’s Name</b> (hyperlink) opens the Caregiver’s Profile.</p>
	 <p>The <b>Status</b> column indicates the Action taken by the Caregiver as follows:</p> <ul style="list-style-type: none"> <li>• <b>No Action</b> – has not interacted with the Broadcast; no request submitted.</li> <li>• <b>Rejected</b> - has requested the shift or Master Week but their request has been rejected.</li> <li>• <b>Request Pending</b> - has requested the shift or Master Week and no action has been taken.</li> </ul>

**Note:** Once a Request has been assigned, the broadcast closes and the menu is no longer available.

## Other Notes Regarding Master Week Broadcast Master Week with Mixed Disciplines (Skilled and Non-Skilled Discipline Types)

The system does not allow the Broadcast of a Master Week with a combination of Skilled and Non-Skilled disciplines. Broadcasts only reach Caregivers with the matching criteria to include the Employment Type disciplines in their profile as well as those disciplines indicated on the Patient’s authorization.

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## Master Week > Change Caregiver

With the exception of **Temp Caregiver (1000)**, the system does not allow users to manually change a Caregiver on any shift once a successful Master Week Broadcast has been created. To correct this, the user would have to **Revoke the Broadcast** and re-create to change Caregiver details.

## Master Week > Alternate Shift

System does not allow users to create a Master Week Broadcast with an Alternate Shift.

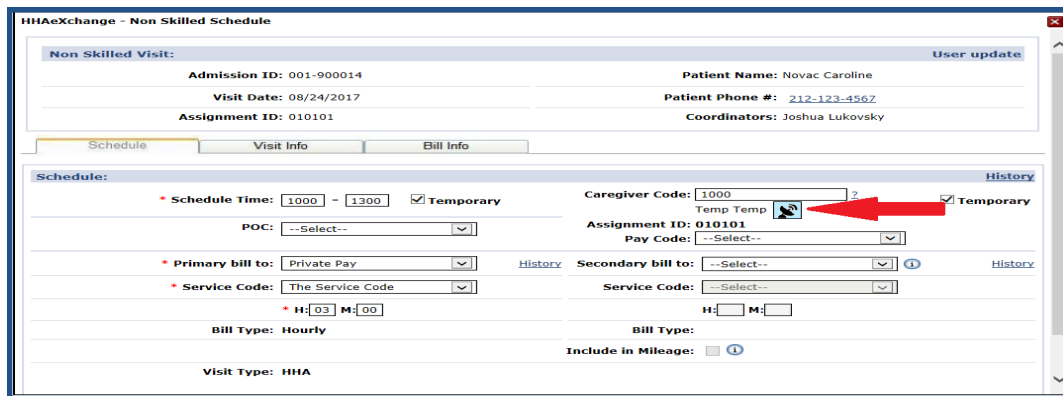
# Single Shift Broadcasting

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

**Single Shift Broadcasting** options are found in the *Visit Schedule* tab and the *Visit Search Page*. As with the Master Week, the Broadcast icon appears in these pages allowing users to access the Broadcast functionality. Refer to the [Broadcasting](#) topic and to the [Options after Broadcast](#) section of the **Master Week Broadcasting** topic to review.

## Visit Info Schedule tab Location

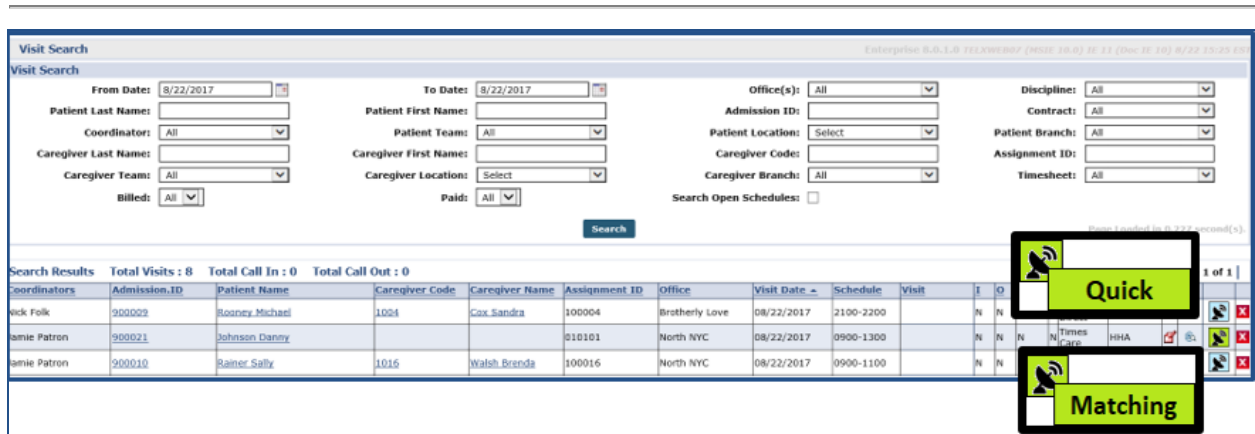
The Broadcasting icon is available under the Caregiver field in the visit Schedule tab, as illustrated in the following image. The icon appears in blue if a Broadcast has not been issued for this visit.



Visit Info: Schedule tab

## Visit Search Page Location

On the *Visit Search* page, users see visits and if a Broadcast has been issued; Broadcast icons denoted in green indicate an issued Broadcast for the visit. Hovering over the icon indicates whether the Broadcast is **Quick** or **Matching Caregivers**.



Enterprise 5.0.1.0 POCXW007 (MSD: 10.0) # 21 (Doc ID: 10) 8/22/2017 11:23 AM

Visit Search

From Date: 8/22/2017 To Date: 8/22/2017

Office(s): All Discipline: All

Admission ID: Contract: All

Patient Last Name: Patient First Name: Patient Team: All Patient Location: Select Patient Branch: All

Coordinator: All Caregiver First Name: Caregiver Code: Assignment ID: All

Caregiver Last Name: Caregiver Location: Select Caregiver Branch: All Timesheet: All

Caregiver Team: All Caregiver Location: Select Caregiver Branch: All

Billed: All Paid: All Search Open Schedules:

Search

Search Results Total Visits : 8 Total Call In : 0 Total Call Out : 0

Coordinators	Admission ID	Patient Name	Caregiver Code	Caregiver Name	Assignment ID	Office	Visit Date	Schedule	Visit	I	O	
beck Folk	900009	Rooney, Michael	1004	Cox, Sandra	100004	Brotherly Love	08/22/2017	2100-2200		N	N	
amie Patron	900021	Johnson, Danny			010101	North NYC	08/22/2017	0900-1300		N	N	Times para HHA
amie Patron	900010	Rainer, Sally	1016	Walsh, Brenda	100016	North NYC	08/22/2017	0900-1100		N	N	

Visit Search Page: Viewing Broadcasts

## Other Notes Regarding Single Shift Broadcast Visits > Change Caregiver

Once a successful Open Case Broadcast has been created, a Caregiver Change causes the system to save the specific Caregiver on the schedule and revoke the Broadcast. If the change is confirmed, all Caregivers who requested the shift are declined.

If the change is for a Caregiver who is currently Pending Request the change is saved, the confirmation message is sent via the Case Acceptance process. If the newly scheduled Caregiver has requested for Broadcast, then the system accepts the Broadcast and all other Caregiver requests are rejected with Default Rejection Reason.

**Note:** In this case, users can change the Caregiver to **Temp Caregiver (1000)** without having to confirm or revoke Broadcast.

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## Case Broadcasting: Reporting Tool Data Source

Case Broadcasting data is captured via the Reporting Tool using the “Case Broadcast” data source file. The following are some examples of what information can be retrieved:

- Date Ranges (Sent, Received, Assigned Cases)
- Number of Broadcasts (Sent, Received, Assigned Cases)
- Number of Shifts assigned per Broadcast (Assigned, Rejected)