Digital Applicant Onboarding (DAO) Process Guide

Setup and Features

Document Revision History

Date	Description of Revision
03/31/2023	Initial version of the document.
04/26/2023	Added Convert to Caregiver to illustrate Converted to Caregiver status.
06/14/2023	Added Creating Custom Fields and Signature Field for Capturing E-Signatures.
07/05/2023	Remove Creating Custom Fields and Signature Field for Capturing E-Signatures

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Overview

DISCLAIMER
This feature is activated by HHAX System Administration. Please contact Client Success for further information.

The HHAeXchange **Digital Applicant Onboarding** (**DAO**) function streamlines the conversion of Applicants into Caregivers through the Agency-configured Caregiver Applicant Portal. Providers are responsible for certain Digital Applicant Onboarding setups, such as establishing application forms, unique workflows, and stylized settings.

This guide provides instructions related to Application Process Management and supervision of Applicants through the Provider application, including:

- A description of Digital Applicant Onboarding permissions setups and access.
- Instructions to add *HR Representatives* to office(s) to manage Applicants.
- Instructions for *Application Form* creations and *Application Workflow* customizations.
- Instructions for Agency-specific *Theme* settings.
- Instructions to use the Applicants *List* feature to perform Agency-related actions for Applicant(s).

HHAX System Key Terms and Definitions

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

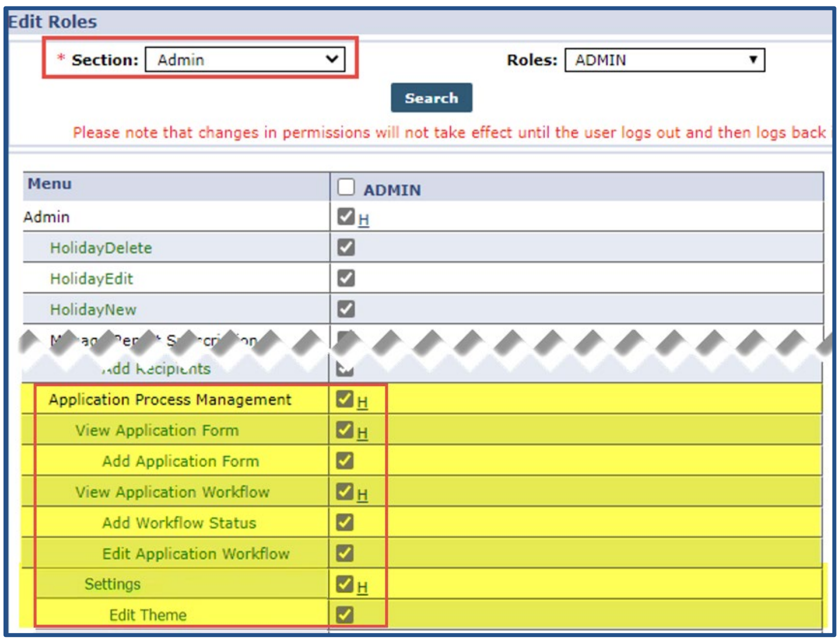
Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.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

Digital Applicant Onboarding (DAO) Permissions and Access

Providers use DAO to access, create, and manage application forms, workflows, and theme-related settings for the Caregiver Applicant Portal.

Access to the Application Process Management Page

Once the **Digital Applicant Onboarding** feature is enabled by HHAX Administration, role-based permissions must be granted in the application. To grant access to roles, navigate to the User Management, *Edit Roles* page (***Admin > User Management > Edit Roles***). On the *Edit Roles* page, select *Admin* from the **Section** field, select the role(s) from the **Roles** dropdown, and click ***Search***.



Permissions: Application Process Management

The following permissions are necessary to view, add, and edit Application Forms, Workflows, and Settings via the Application Process Management page (***Admin > Application Process Management***):

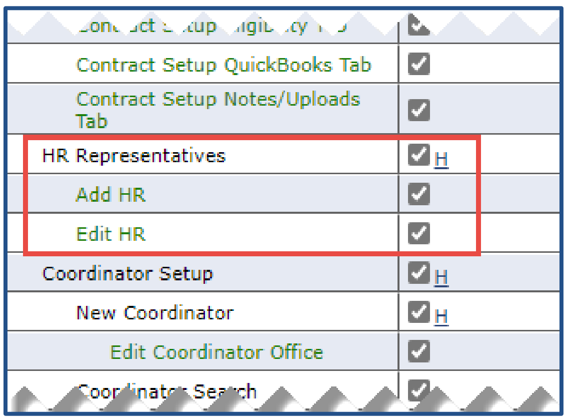
Permission	Description (Allows users to…)
Application Process Management	Access to the Application Process Management page.
View Application Form	View Application Forms.
Add Application Form	Add Application Forms.
Add Workflow Status	Add Workflow statuses.
Edit Application Workflow	Edit Application Workflows.
Settings	Access Settings on the Application Process Management page.

Permission	Description (Allows users to…)
Edit Theme	Access to edit the Caregiver Applicant Portal theme on the Application Process Management page (for example, the Agency logo).

Access for HR Representatives

Access to the **HR Representatives** feature is role-based and is granted via the User Management, *Edit Roles* page (***Admin > User Management > Edit Roles***). On the *Edit Roles* page, select *Admin* from the **Section** field, select the role(s) from the **Roles** dropdown, and click ***Search***.

From the table of permissions, select *HR Representatives*. There are also related permissions to add and edit HR Representatives as illustrated in the image below.



Permissions: HR Representatives

Caregiver Applicant Portal Link

The Caregiver Applicant Portal link is used to distribute access to the Portal to applicants.

Navigate to ***Admin > Office Setup > Search Office > Edit Office*** to the **Web Applicant Unique URL** field at the top right of the page to acquire the Caregiver Applicant Portal link.

Copy the web URL from this location and paste it onto the appropriate job board or corporate website page for hiring purposes.

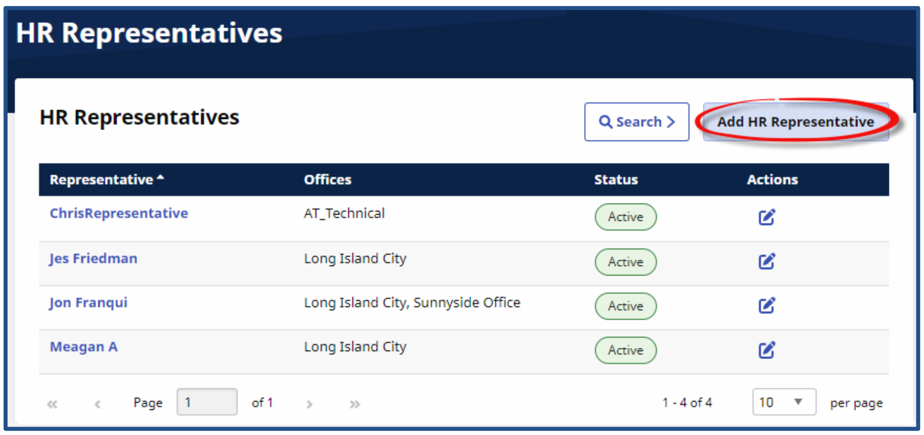
Edit Office Page: Web Applicant Unique URL Field

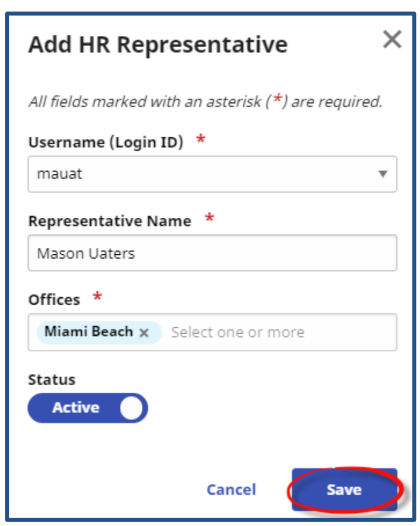
HR Representatives

On the *HR Representatives* page, Providers can add and edit HR Representatives in the application. HR Representatives are responsible for Applicant management corresponding to their assigned office(s).

Adding HR Representatives

Complete the steps in the table to add an HR Representative in the application.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Admin > HR Representatives.</td></tr>
<tr><td>2</td><td>On the HR Representatives page, on the top right, click HR Representative.


Add HR Representative Button
Note: On the HR Representatives page, click on the Edit icon (✎) in the Action column to edit the corresponding HR Representative’s information.</td></tr>
<tr><td>3</td><td>In the Add HR Representative window, select a Username (Login ID) from the existing Agency users in the dropdown. Enter the Representative Name. Select one or more Offices to assign to the HR Representative. Click the Status sliding button to identify the HR Representative as Active or Inactive. Click Save.


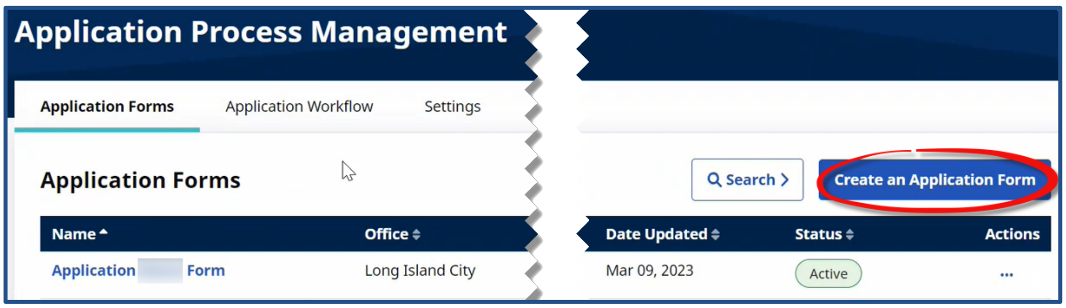
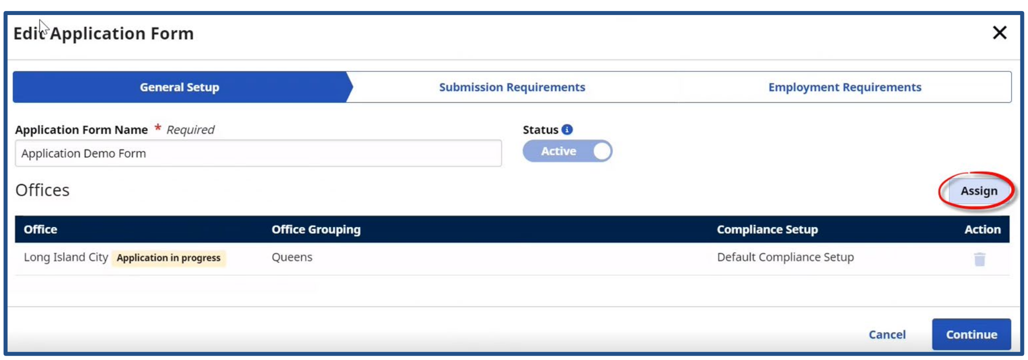
Add HR Representative Window</td></tr>
</table>

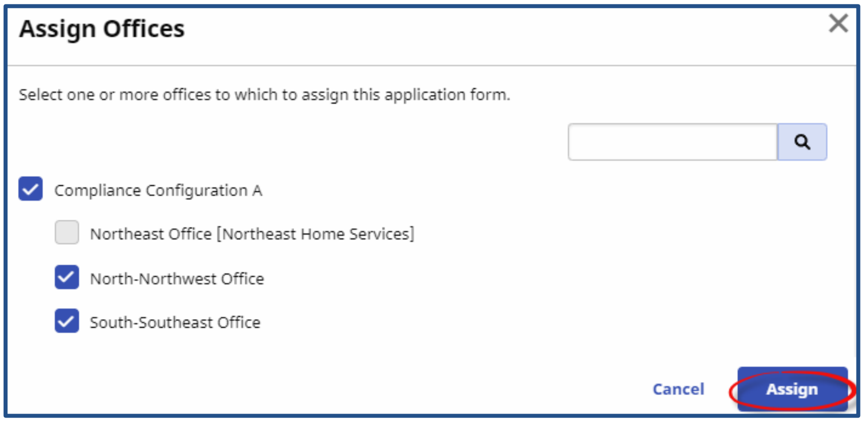
Application Forms

When accessing the feature, the *Applications Forms* tab (***Admin > Application Process Management***) opens by default. This page is used to create and manage application forms to be completed by Applicants via the Caregiver Applicant Portal.

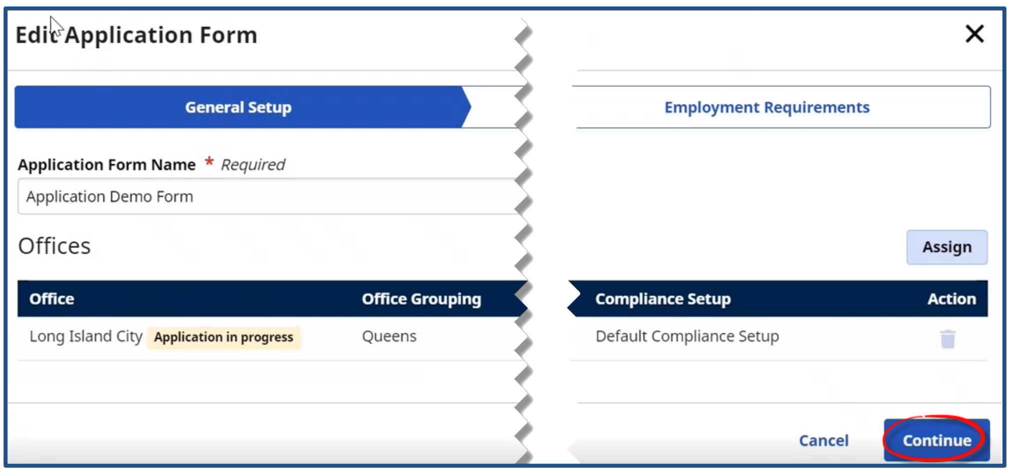
General Form Setup

Complete the steps in the table to create a form.

Step	Action
1	Navigate to ***Admin > Application Process Management***.
2	On the *Application Forms* tab, click on the ***Create an Application Form*** button.  **Create an Application Form Button**
3	The *Create New Application Form* window opens to the *General Setup* tab by default. Select/Enter the **Application Form Name** (required). In the **Status** field, slide the button to <u>*Active*</u>. In the *Offices* section, click on the ***Assign*** button to the far-right of the table to assign offices.  **Create New Application Form Window: General Setup Section**
4	In the *Assign Offices* window, select the applicable office(s) for assignment, then click on the ***Assign*** button.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


Assign Offices Window
</td></tr>
<tr><td>5</td><td>
Click Continue to proceed to the next section.

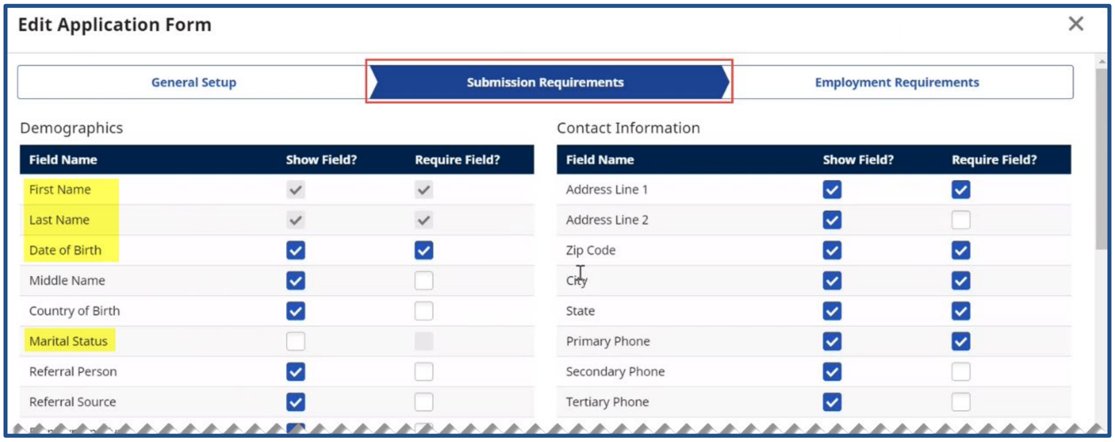


General Setup Section: Click Continue
</td></tr>
</table>

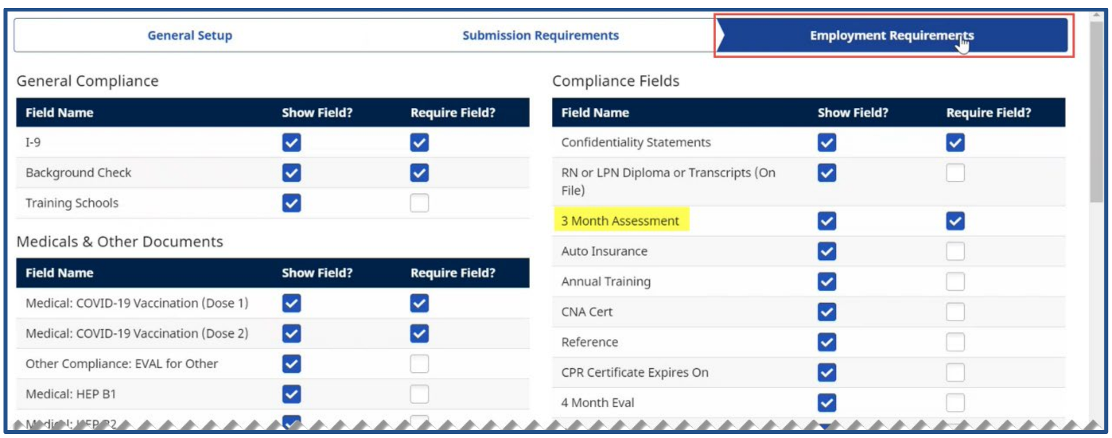
Submission and Employment Requirements Setup

In the *Submission Requirements* tab, select and configure application fields for Applicants to submit in the initial round of the onboarding process (basic information including **First Name**, **Last Name**, **Date of Birth**, and **Marital Status**).

In the *Employment Requirements* tab, select and configure employment requirement fields which may focus on specific qualifications for employment as a Caregiver (for example, a **3 Month Assessment**).



Submission Requirements Tab

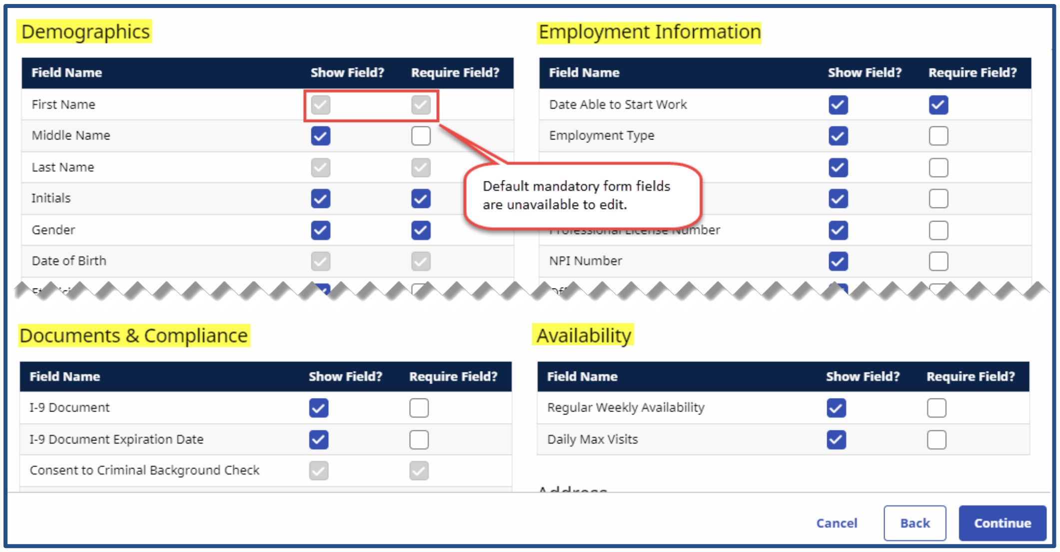


Employment Requirements Tab

Selecting Fields for Requirements

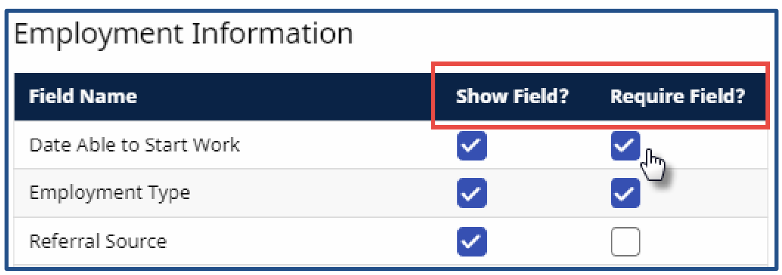
In the *Create New Application Form* window, form fields are divided into the following groups in both the *Submission* and *Employment Requirements* tabs: *Demographics*, *Employment Information*, *Documents & Compliance*, *Availability*, *Address*, *Emergency Contact Information*, and *Custom Fields*.

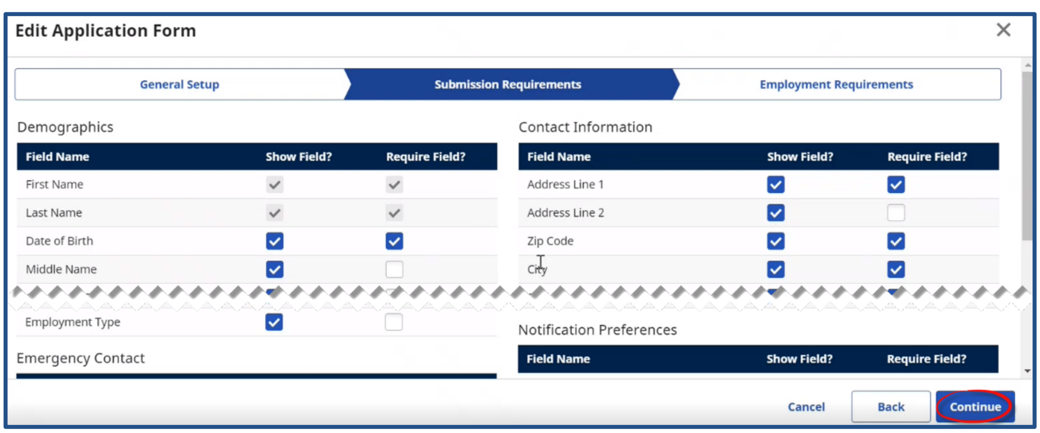
Fields such as **First Name**, **Last Name**, and **DOB** are required default fields and cannot be edited once the initial form is created and submitted, as seen in the following image.



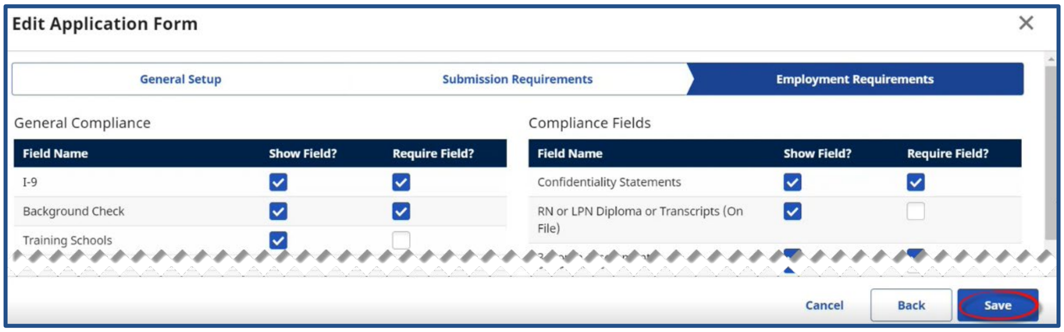
Create New Application Form: Grouped Fields

Complete the steps in the table to configure both *Submission* and *Employment Requirements* fields.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>In the Submission Requirements tab, for each Field Name, select whether to display the field (Show Field? column) and if to make the field mandatory (Require Field? column).


Show Field and Require Field Columns</td></tr>
<tr><td>2</td><td>After completion of the Submission Requirements tab, click Continue.


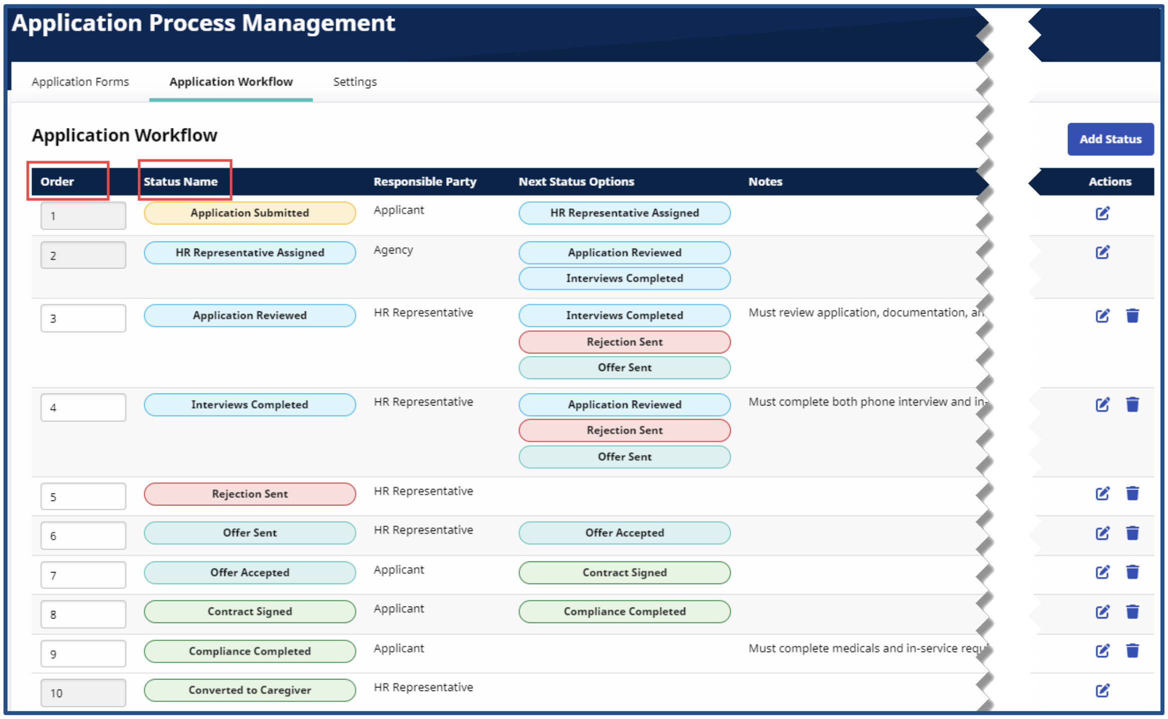
Submission Requirements Tab: Click Continue</td></tr>
</table>

Step	Action
3	Repeat the steps above to select fields in the *Employment Requirements* tab. Click ***Save*** to finalize.  **Employment Requirements Section: Click Save**

Application Workflow

The *Application Workflow* tab is used to customize Agency-specific workflows to structure the digital onboarding process. The image below illustrates various **Status** labels to monitor the progress during the digital onboarding process to include *Application Submitted*, *HR Representative Assigned*, and *Rejection Sent*, among others.

The **Order** column indicates the numerical sequence of actions to take place based on the Status label, such as *Application Submitted* representing the first action.



Application Workflow Tab

Default Status labels (with corresponding **Order** column numbers in gray) are as follows:

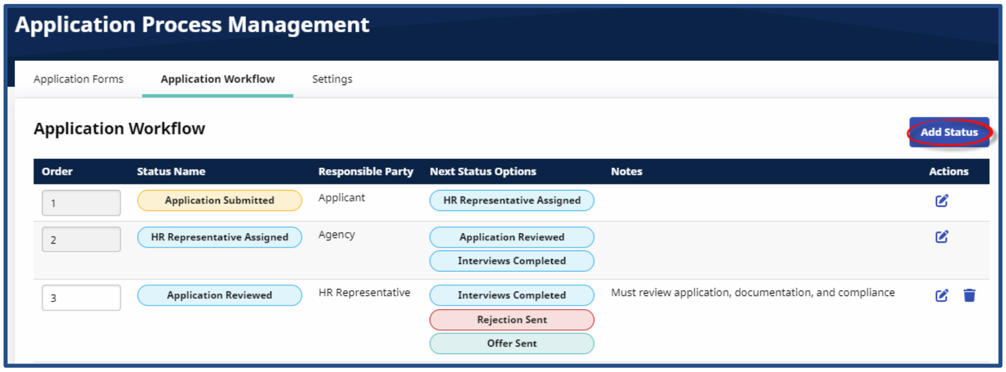
- *Application Submitted*
- *HR Representative Assigned*
- *Converted to Caregiver*

Based on standard hiring procedures, suggested Status labels to incorporate into the Application Workflow are as follows:

- *Application Reviewed*
- *Interviews Completed*
- *Rejection Sent*
- *Offer Sent*
- *Offers Accepted*
- *Contract Signed*
- *Compliance Completed*

Add a Status

Complete the steps in the table to add a status to the *Application Workflow* grid.

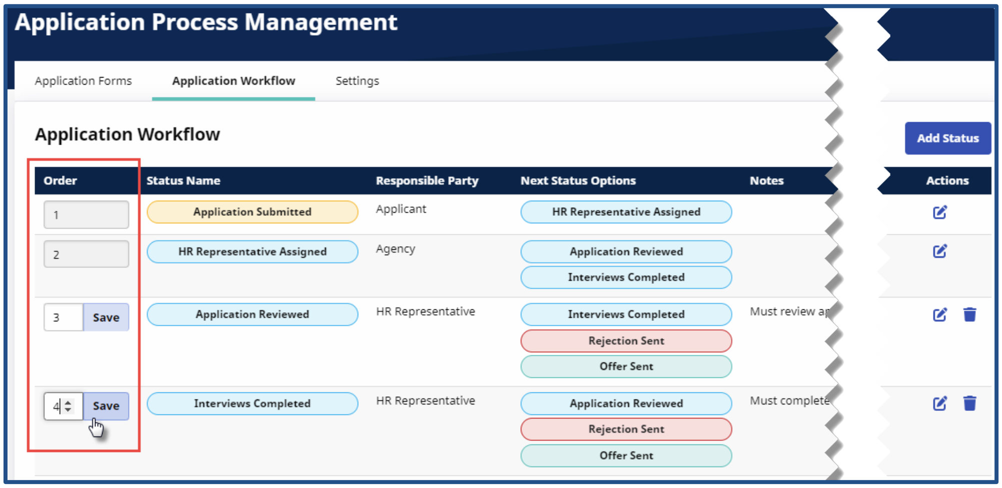
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Admin > Application Process Management.</td></tr>
<tr><td>2</td><td>On the Application Workflow tab, on the top right, click Add Status.


Add Status Button</td></tr>
<tr><td>3</td><td>In the Add Status window, enter or select values for the required fields (denoted with red asterisks) to define the status, as described in the table below.


Add Status Window
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status Name</td><td>Enter the name of the status.</td></tr>
<tr><td>Responsible Party</td><td>Click the dropdown menu to select the party responsible for the status to be completed, such as: Agency, Applicant, or HR Representative.
Note: The Agency is responsible to update the actual status in the application.</td></tr>
<tr><td>Badge Color</td><td>Select the status color from the following options: blue, gray, green, red, teal, or yellow.</td></tr>
<tr><td>Next Status Options</td><td>Click the field to select one or more eligible status(es) in which the status can transition into.</td></tr>
<tr><td>Notes</td><td>Enter supporting notes to describe the status.</td></tr>
</table></td></tr>
<tr><td>4</td><td>Click Save.</td></tr>
</table>

Change Status Orders

In the *Application Workflow* section, use the up/down arrows in the **Order** column to move workflow items to the desired **Status** order, as seen the image below. Click ***Save*** to update.

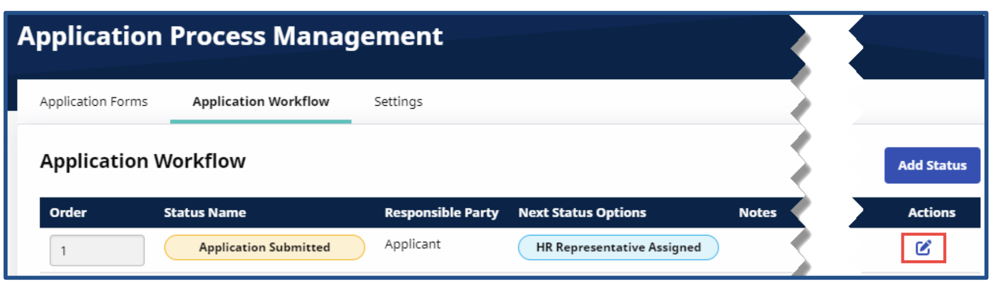


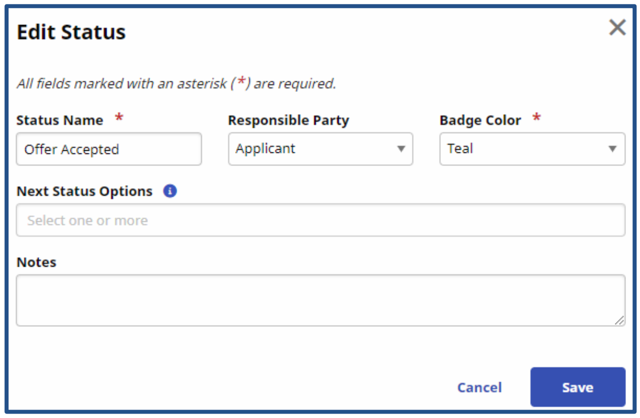
Application Workflow Tab: Order Column

Note: *Order column fields in gray are unavailable to edit or reorder.*

Edit a Status

Complete the steps in the table to edit an existing status.

Step	Action
1	Navigate to ***Admin > Application Process Management***.
2	Click on the Edit icon of the desired row.  **Click the Edit Icon**
3	The *Edit Status* window opens. Enter or select values for the required fields (denoted with red asterisks) to define the status. Refer to step 3 in Add a Status for field descriptions.

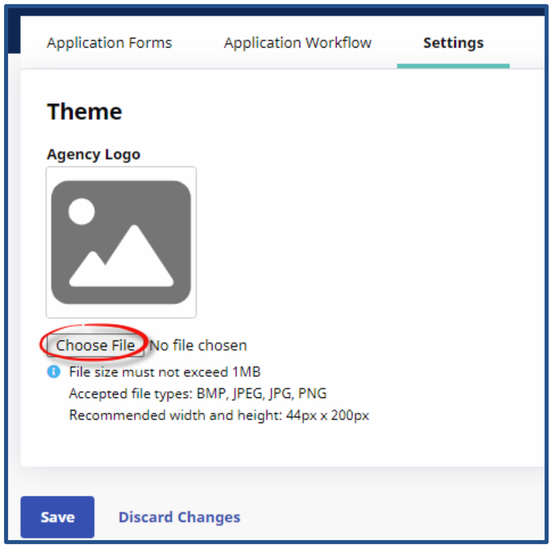
Step	Action
	 **Edit Status Window**
4	Click ***Save***.

Settings

The *Settings* tab is used to configure an Agency's visual theme for the application.

Theme

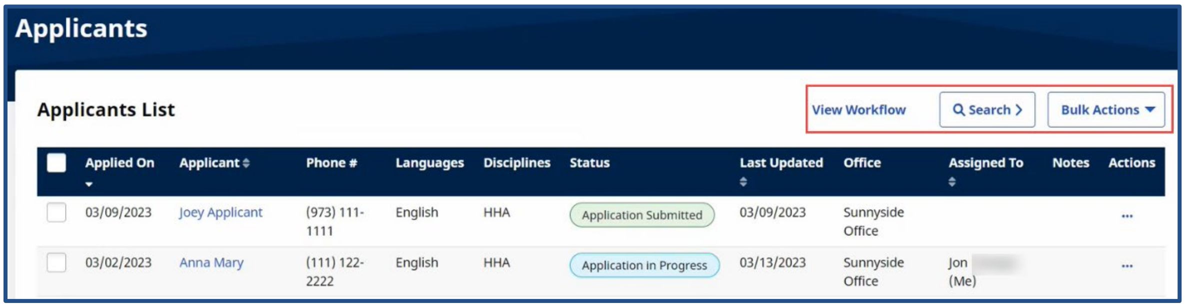
Complete the following steps to configure the application's Agency logo and color theme(s).

Step	Action
1	From the ***Admin*** menu, click ***Application Process Management***.
2	On the *Application Process Management* page, click on the *Settings* tab.
3	Click on the ***Choose File*** button to upload the **Agency Logo** to the application.  **Theme Tab: Agency Logo Field**
4	Click ***Save***.

Applicants List

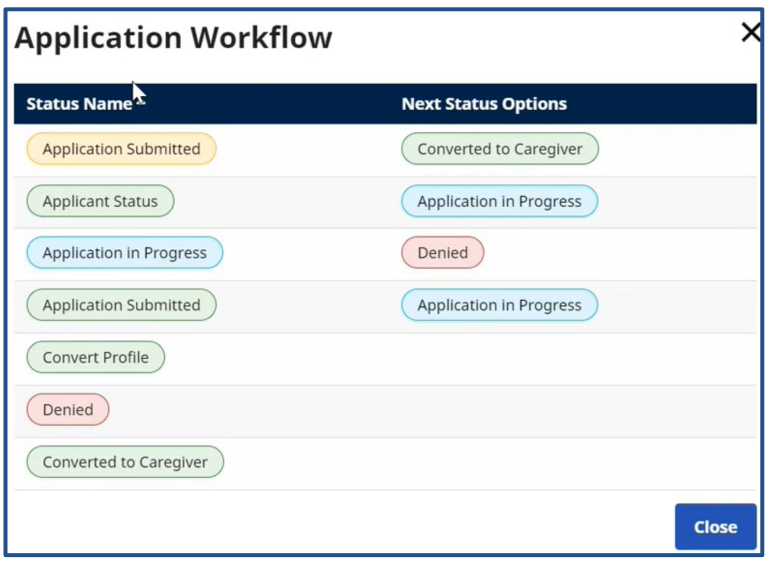
The *Applicants List* page (***Caregivers > Applicants***) is used to manage Applicants.

The *List* tab displays Applicant data organized in a grid, such as names, contact information, and up-to-date Status labels. Various functions such as **View Workflow** (link), ***Search***, and ***Bulk Actions*** are available, as seen in the following image.



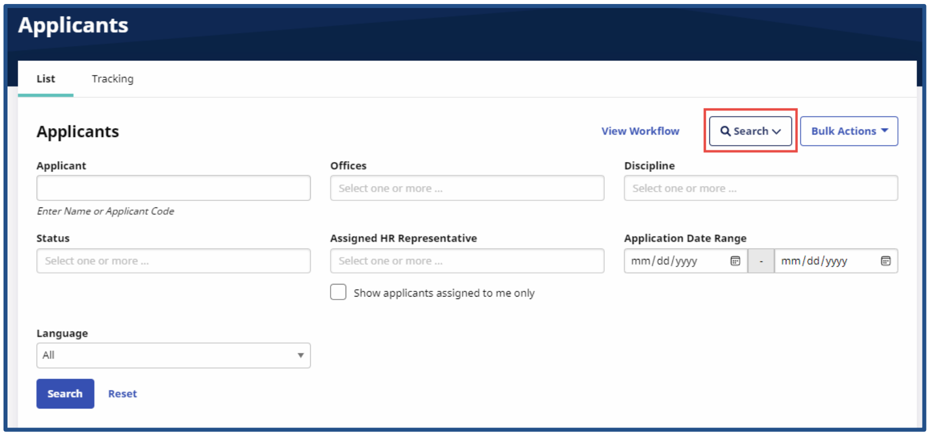
Applicants Page: List Tab

Click on the **View Workflow** link to view the customized application workflow Agency configuration.



Application Workflow Window

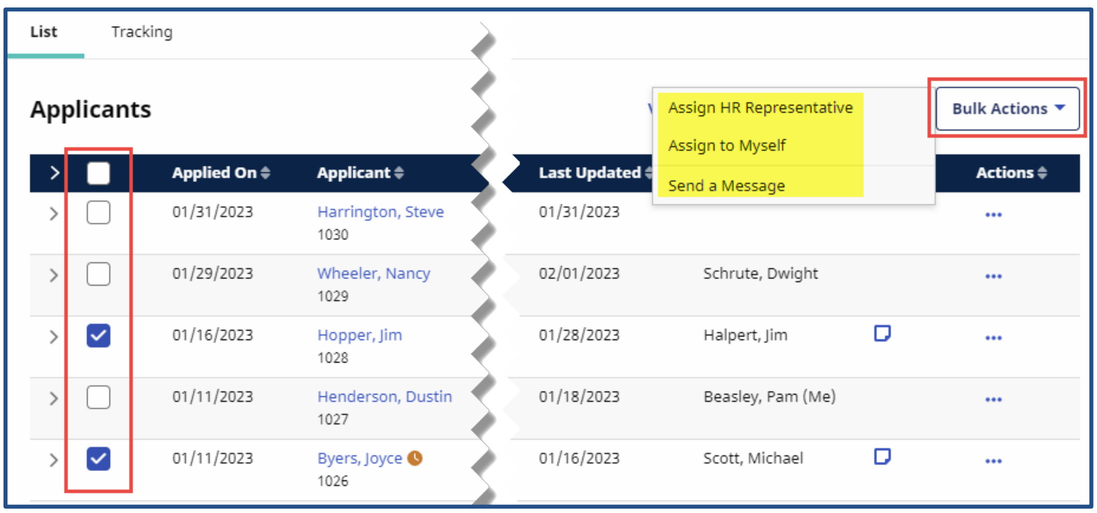
Click ***Search*** to sort and search Applicant(s) in the grid based on their **Applicant** Name, **Code**, **Offices**, **Discipline**, **Status**, among other fields.



Search Button Dropdown: Applicants Search Fields

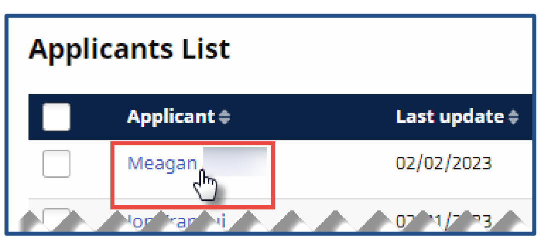
In the *Applicants* section, select the applicant(s) by selecting the applicable checkboxes on the left-most column. Click on the ***Bulk Actions*** button and select an action from the menu options.

Note: *Only some actions can be performed in bulk, such as sending a message. Other actions must be performed on an individual basis.*



Bulk Actions Button Dropdown: Checkbox Field Selection(s) and Actions

Click the hyperlinked **Applicant Name** in the **Applicant** column to access an Applicant's profile as displayed in the image below. Refer to Applicant Profile section to learn specifically about the Applicant Profile and its components.



Click the Applicant Name to access the Profile

Click on the ellipsis (…) from the **Actions** column to access applicable actions for the corresponding Applicant. Refer to Applicant List Actions section for more details about the actions.

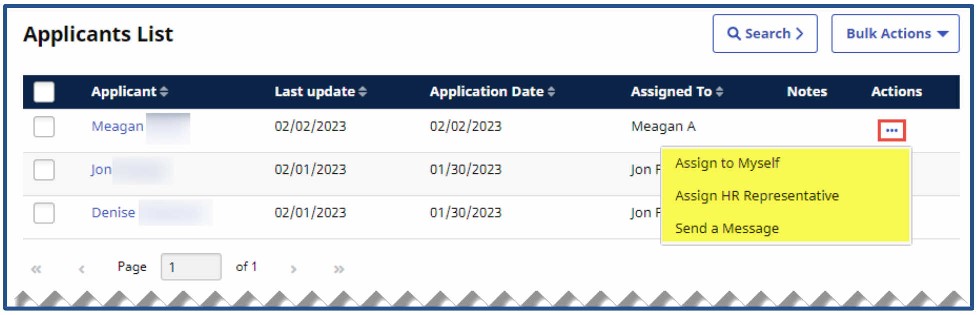
Actions displayed in the **Actions** column are based on the displayed Applicant **Status** (for example, an Applicant can be scheduled for an interview after an HR Representative is assigned).

Click ***Delete*** to delete an Applicant.

Actions Column and Options for Individual Applicant

Applicants List Actions

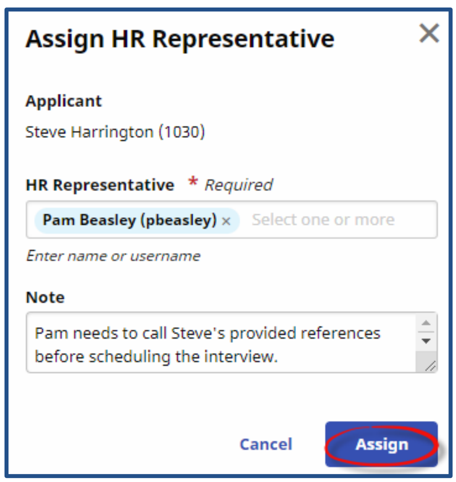
Use the ellipsis (…) under the **Actions** column to access applicable actions for the corresponding Applicant. The following sections cover the actions available to perform under the **Actions** column.



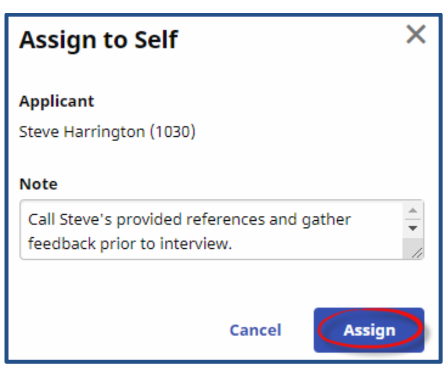
Applicants List Actions

Assign HR Representative or Myself

When the *Assign HR Representative* option is selected, the window opens as seen in the following image. Select the **HR Representative** (top image) to assign to the Applicant or **Assign to Self** (bottom image). Include a supporting a **Note** (optional) and click ***Assign*** to finalize.



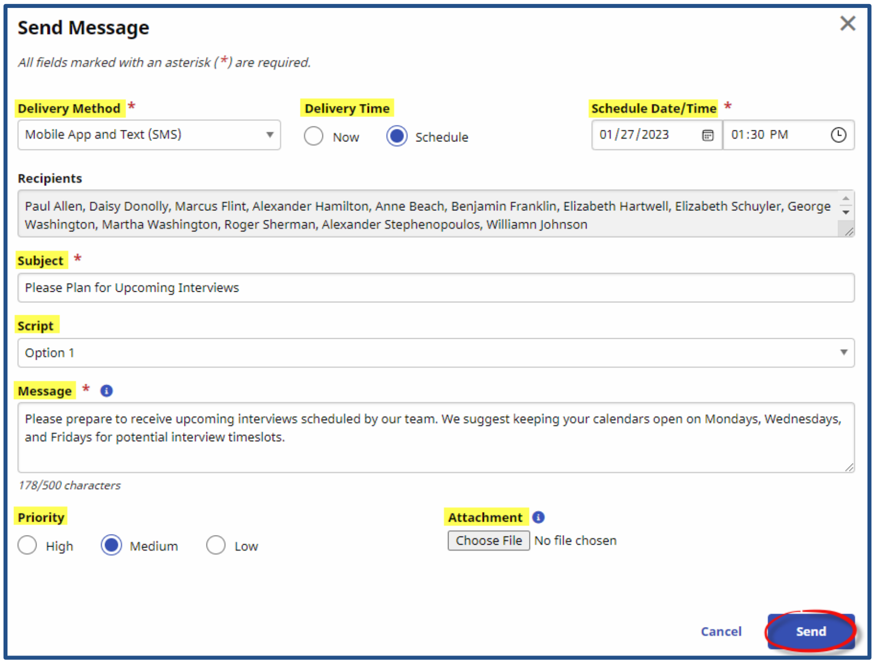
Assign HR Representative Window



Assign to Self Window

Send a Message

Select the *Send Message* option to open the *Send Message* window. Enter or select values for the required fields (denoted with red asterisks) to define the message, as described in the table below. Click ***Send***.



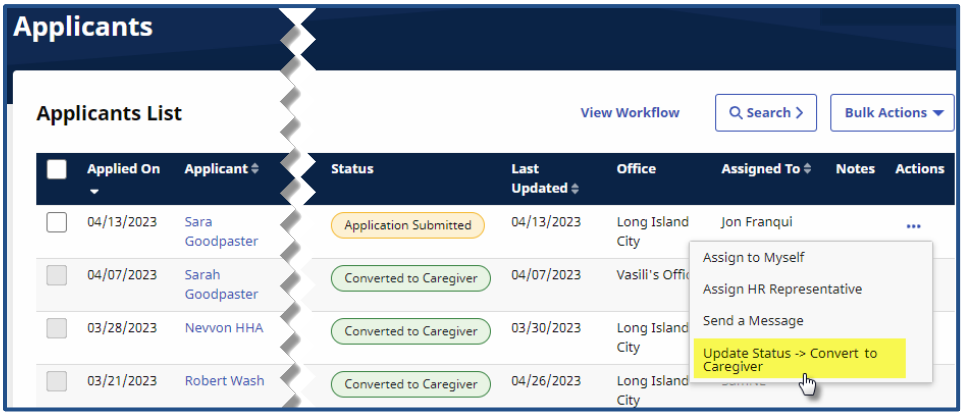
Send Message Window

Field	Description
Delivery Method	Select the delivery method for the message from the following options: *Mobile App and Text (SMS)*, *Mobile App Messaging*, *Email*, and *Text (SMS)*.
Delivery Time	Select the delivery time from the following options: *Now* or *Schedule*.
Schedule Date/Time	If *Schedule* is selected as the **Delivery Time**, then enter or select the schedule date and time from the pop-up fields at the top right.
Subject	Enter the subject line for the interview message.
Script	Select a pre-defined message option to be used for this message. ***Note:*** *Script setup is in* ***Admin > Reference Table Management****.*
Message	Enter a brief outline of expectations or plans for the interview.
Priority	Select the priority as *High*, *Medium*, or *Low* to indicate the urgency of the message.
Attachment	Click ***Choose File*** to attach a file to accompany the message.

Update Status

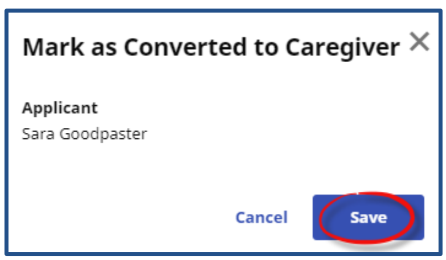
From the **Actions** column, select *Update Status* -> to update the Applicant's status to the next anticipated status in line based on the workflow configuration.

Note: *If there are multiple anticipated status options for an Applicant, the Actions options displays more than one Update Status selection.*



Applicants List: Update Status

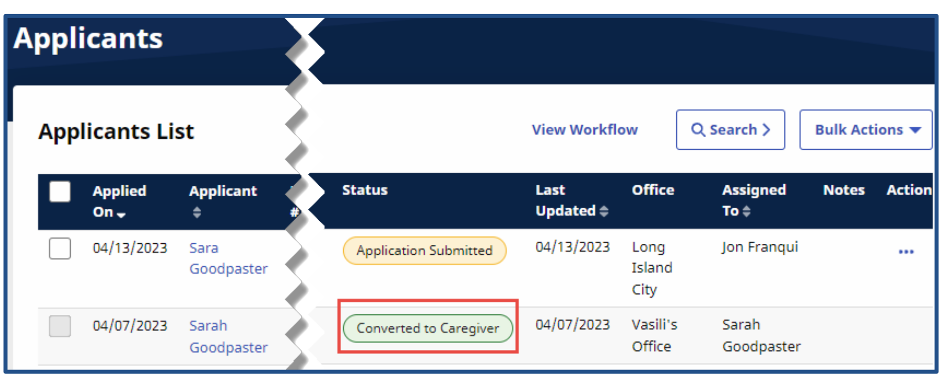
In the *Mark as…* window, click ***Save*** to save the newly updated status (such as *Application in Progress*) as shown in the image below.



Mark as… Window for Status Update

Convert to Caregiver

When an Applicant is successfully converted to a Caregiver, the associated Status displays on the *Applicants List* page, as illustrated in the image below.

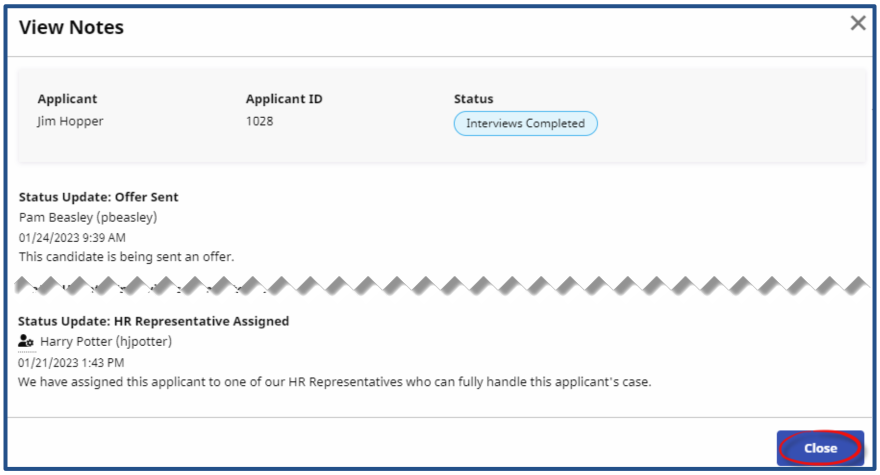


Converted to Caregiver Status

Note: *The Applicant Profile also displays the Converted to Caregiver status once an Applicant is successfully converted to a Caregiver on the application.*

View Notes

Select *View Notes* from the **Actions** column to observe the tracked notes across different Status updates corresponding to the Applicant. Click ***Close***.

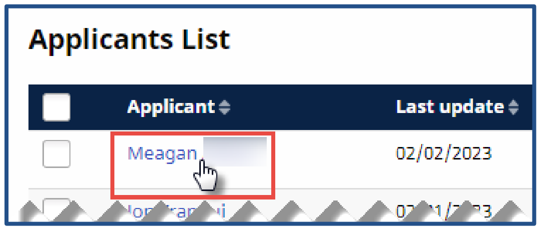


View Notes Window

Note: *If there are notes corresponding to an applicant, click on the View Notes icon ( ) in the* ***Notes*** *column in the Applicants List grid to quickly view the saved notes under the Lists tab.*

Applicant Profile

Click on the **Applicant Name** (link) to access the Applicant Profile.

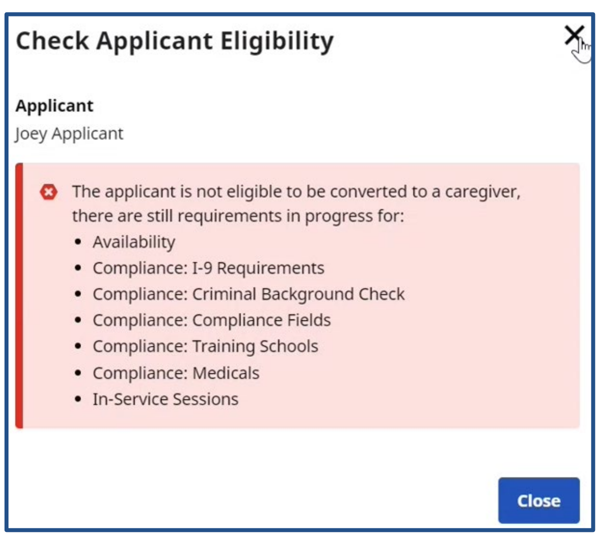


Applicants List: Click the Applicant Name to access the Profile

The following image illustrates the Applicant Profile displaying the Applicant's information and the various options that can be performed from this page.

Applicant Profile and Accessible Menus

At the top right of the *Profile* page, click on the ***Check Progress*** button to verify the Applicant's eligibility if the Applicant's information has changed. Next, in the *Check Applicant Eligibility* window, observe the in-progress requirements for the Applicant, as displayed in the image below.



Check Applicant Eligibility Window: In-Progress Requirements

Click on the ***Update Status*** button to update the Applicant's status to the next anticipated status in line based on the workflow configuration, such as *Mark as Application in Progress* or *Mark as Converted to Caregiver*.

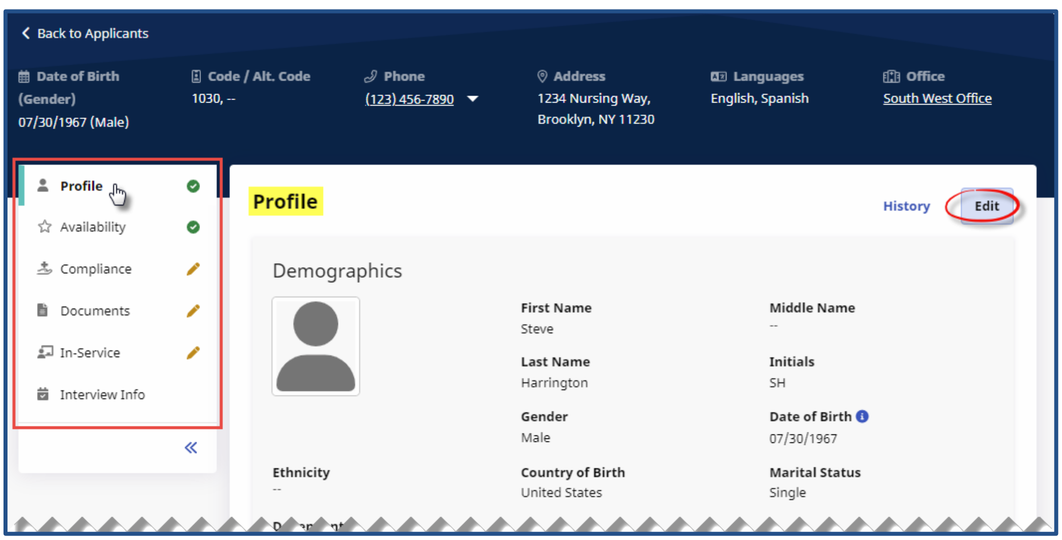
Update Status Dropdown

Profile

The Applicant Profile consolidates of the Applicant's information into the following groups:

- *Demographics*
- *Languages*
- *Employment Information*
- *Contact Information*
- *Emergency Contact Information*
- *Notification Preferences*

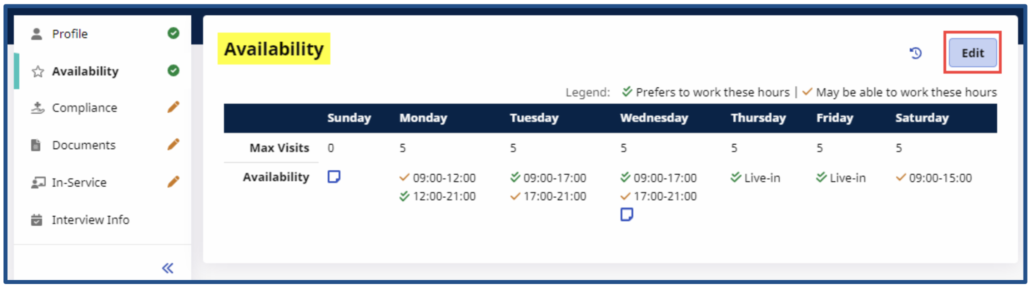
On the top right of the *Profile* header, click on the ***Edit*** button to open fields to edit information in the Applicant Profile.



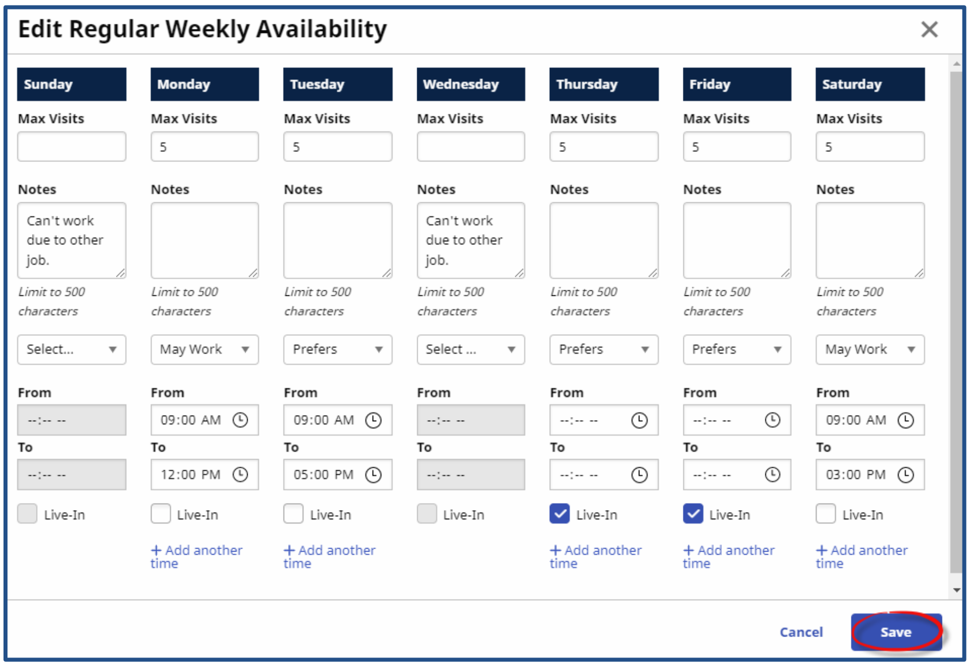
Applicant Profile: Profile Page

Applicant Availability Page

The Applicant *Availability* page houses the Applicant's workweek availability as a prospective Caregiver in the application. Click on the ***Edit*** button to update or change the Applicant's availability setup.



Applicant Availability Page



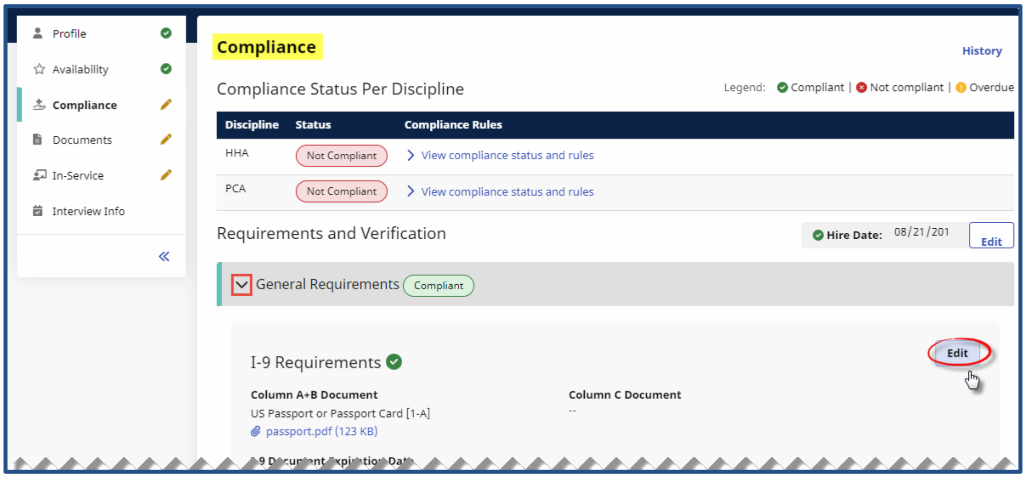
Edit Regular Weekly Availability Window

Field/Link	Description
Max Visits	Enter the number of maximum visit(s) per workday.
Notes	Enter notes to accompany or describe the availability per workday.
From/To	Enter or select starting and ending hours in the **From** and **To** checkboxes to specify the hourly availability per workday. Select *Prefers* or *May Work* in the dropdown to indicate the type of availability for the workday.
Live-In	Select **Live-In** if the Caregiver can work a Live-In shift.
+ Add another time	Click **+ Add another time** to add another availability to establish for the workday.

Compliance

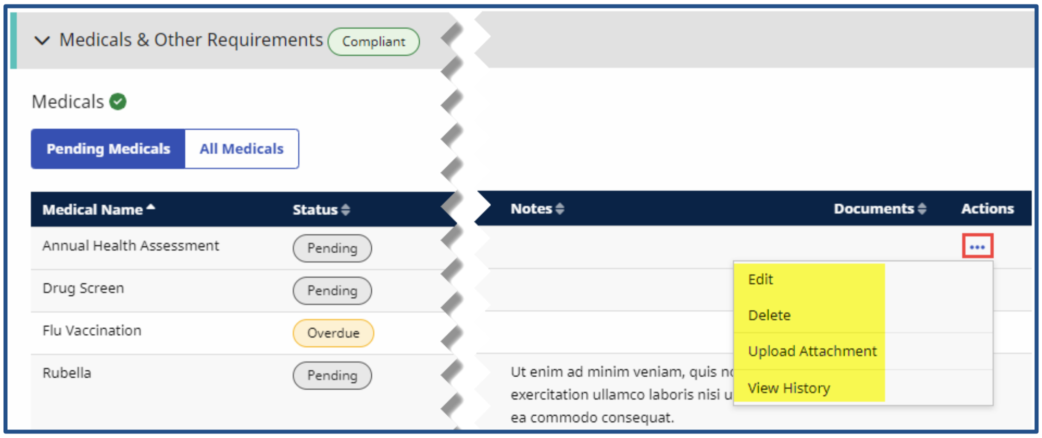
The Applicant *Compliance* page displays all compliance information for the Applicant categorized into sections to include *Compliance Status per Discipline*, *General Requirements*, *Medicals & Other Requirements*, and *Verification*.

As illustrated in the image below, click on the dropdown arrows to expand individual sections. In the expanded section, click on the ***Edit*** button (on the top right) to update or change applicable data for sections.



Applicant Compliance Page

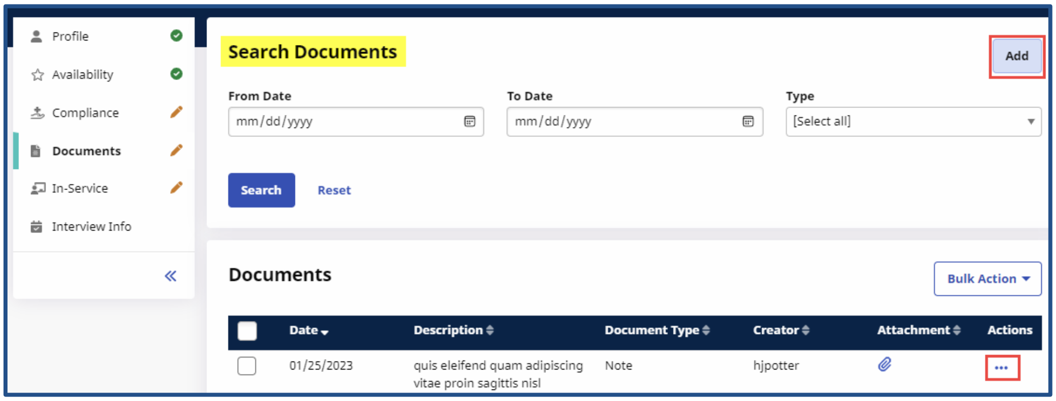
In the expanded *Medicals & Other Requirements* section, click on the ellipsis (…) under the **Actions** column to edit, delete, or upload an attachment to a medical record.



Applicant Medicals & Other Requirements: Actions Column

Applicant Documents

The Applicant *Search Documents* page displays professional documents such as Compliance I-9, Compliance References, and Caregiver Statements, among others. Click on the ***Add*** button to add a document (for example, Compliance Evaluation) for the Applicant. Click on the ellipsis (**…**) under the **Actions** column to *edit*, *delete*, *replace*, or *remove* a document.

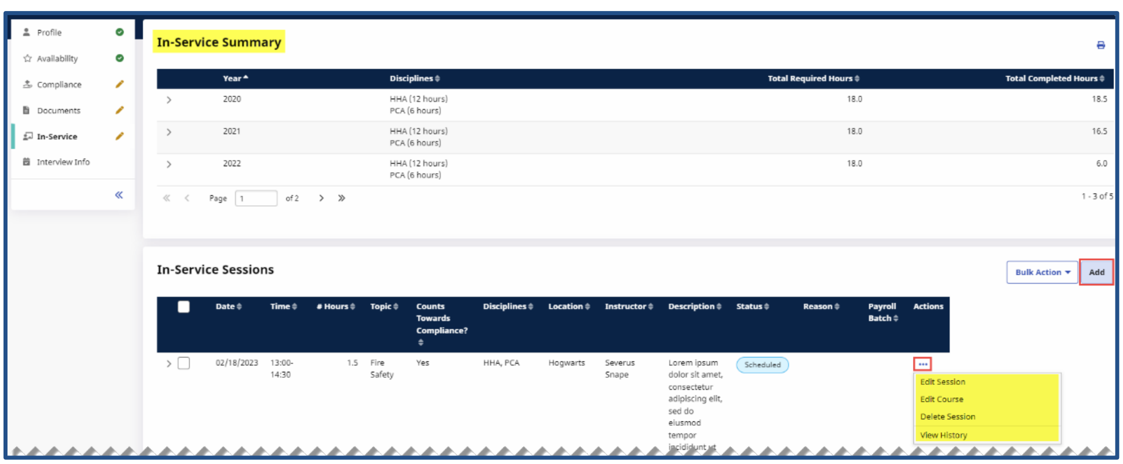


Applicant Search Documents Page

Applicant In-Service

The Applicant *In-Service Summary* page displays in-service sessions performed by the Applicant per year, discipline, total required (hours), and total completed hours.

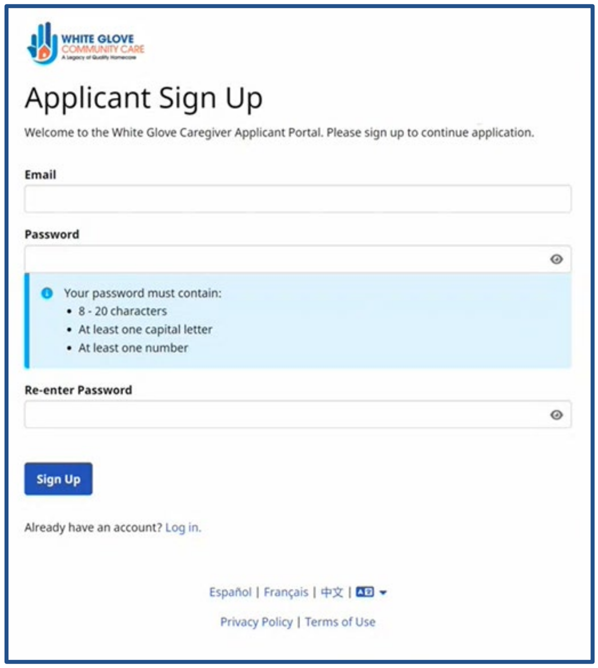
As displayed in the image below, click on the ***Add*** button to add an in-service session for an Applicant's record. Click on the ellipsis (**…**) under the **Actions** column to edit/delete a session, edit a course, or view the related history.



Applicant In-Service Summary Page

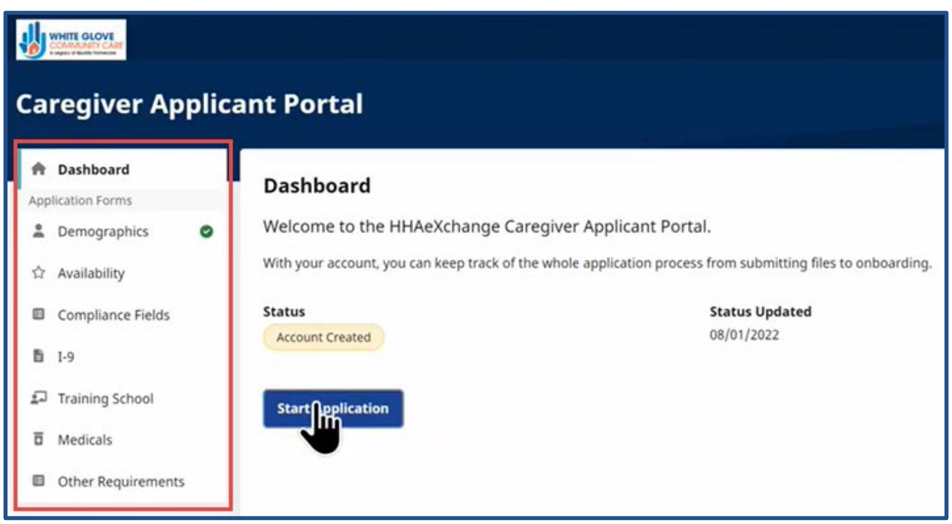
Caregiver Applicant Portal

Once the DAO application configurations are complete, Applicants can sign up to the Caregiver Applicant Portal using the shared URL by the Agency.



Caregiver Applicant Portal: Applicant Sign Up

Once logged in, Applicants are routed to the *Dashboard* page, as seen in the following image. The left-navigation panel displays the various configured application forms to be completed. From here, Applicants can view and edit various application forms such as *Demographics*, *Availability*, *Compliance Fields*, among others, for digital applicant onboarding procedures.



Caregiver Applicant Portal: Dashboard Page and Application Forms Menus