

# Mobile App Process Guide for Agency Agency Setup and Management

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# **Document Revision History (Last 2 Years)**

Date	Description of Revision
	Added: Mobile Section in the Admin Office Setup page
01/04/2021	Update: Schedule Time Column Added to the Time Correction Dashboard
01/04/2021	Added: Prevent Restricted Caregivers from Viewing Patient Information
	Added features to Caregiver Mobile App
04/15/2021	Added: Mobile App Nevvon Integration
04/13/2021	Updated: Mobile App Accessibility Guidelines
05/14/2021	Update: GPS EVV Method to Reduce OOR Exceptions (default setting)
08/02/2021	Accessibility standards applies
00/02/2021	Remove: Care Pathways
8/11/2021	Update: Mobile App Password Reset (Self-directed)
09/30/2021	Add: Warning Confirmation Tolerance Range below 300 Feet
	Add: Patient Address PIN on GPS Map Confirmation
11/3/2021	Add: Mobile: Extend Visit End Time
12/13/2021	Updated Mobile App images
12/22/2021	Added: Biometric Two-Factor Authentication
	Added: Community Visits
02/02/2022	Added: Community Visits: Caregiver Level Setting
04/05//2022	Added: Unscheduled Visits: Service Code Selection
	Added: POC Configuration for Other Duties
08/08/2022	Updated: Case Acceptance Override Enhancements
00,00,2022	Added: Patient POC on Unscheduled Visits
	Added: Log Duties Throughout the Shift
08/23/2022	General updates
02/13/2023	Updated: Mobile App Integration Services (formerly Nevvon Integration)



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# **Overview**

The HHAeXchange (HHAX) **Mobile App** is a handy tool providing Caregivers with real-time schedule information. Available for both iPhone and Android, the Mobile App may be used to place EVVs, enter Duties, and request Open Shifts.

Activating the Caregiver's Mobile profile as well as configuring and enabling the various features of the Mobile App is the Agency's responsibility. This guide provides instructions and guidance for Agencies to set up the HHAX Mobile App on their systems.

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

HHAeXchange Client Support.

DISCLAIMER

Some **Mobile App** features are activated by System Administration. Please contact <u>HHAX Client Support</u> for details, setup, and guidance.

### 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.
ННАХ	Acronym for HHAeXchange





# **Agency Setup**

### Mobile Section in the Admin Office Setup Page

To better manage all Mobile functions in the Enterprise system, navigate to the *Mobile* section in the *Office Setup* page (*Admin > Office Setup*). All Mobile-related functions are managed in this section. Click on the <u>History</u> link to track Mobile configuration activity.

Mobile	History
Mobile Fixed Visit Verification: 💋 🕕	* Mobile GPS Visit Verification: 🗹 Tolerance Range (ft): 🛛 🕐
UnBalanced Tolerance: Hours 01 Min 00 🛈	Mobile Beacon Verification: 🗾 🛈
☑ (Her Open Cases 0)           Open Case Settings:         ☑ Request an Coccet Open Cases 0)           ☑ Acceptance Request Limit 100 - * 0)	Allow Single Clock in/out for Consecutive Shifts (Hobile App): 🗌 🛈
Enable Mobile App Offline Mode: 🗌 🕦	Allow Caregivers to modify Confirmed Time via the Mobile App: 🗌 🚯
Mobile Offline Sync Period: 24 ①	Allow Caregivers to enter Time via the Mobile App when there is no preexisting $\Box$ ()
Enable Alternate EVV Workflow: 🗌 🕦	Allow the Caregiver to view compliance information via the Mobile App: 🗌 🕕
Verification Order: Voice Recording 🗸 🛈	Display Medical Items: 🛛 🗖 days before due date
Require Timesheet if EVV linked to Visit w/o verification: 🛛 🕕 🚺	Display Other Items: 🛛 🗌 days before due date
	Display In-Service Items: 🗌 🔲 days before scheduled class date
Time in hours that a Caregiver can update Duties after a Patient Visit: 28	Enable the I'm Awake button for midnight shifts: 🗌 🕕
Extend the visit end time to include time to enter duties: 🗹 🕕	Allow Users and Caregivers to use the Chat Service: 🗌 🕕
Allow Caregiver to select the visit as a Community visit: $\Box$ ()	Enable Mobile App Biometric Two Factor Authentication: 🗌 🕕
Enable Unscheduled Visit Service Code Selection: 🗌 🕕	

Office Setup: Mobile App Section



# **Mobile Verification and Tolerance Range**

Agencies must authorize the use of the HHAX Mobile App before any Caregiver can connect and place

EVVs from their mobile device. Complete the following steps to set up the connection.

Step	Action		
1	Navigate to Admin > Office Setup > Search Office to locate the applicable Office.		
	The Edit Office page opens. In the Mobile section, select the Mobile GPS Visit Verification and		
	Mobile Fixed Visit Verification checkboxes.		
	Edit Office General Status: Active Y		
	Image: Nobile Fixed Visit Verification:     Image: Compared to the second		
	UnBalanced Tolerance: Hours 01 Min 00 0		
2	wobile App Setup		
	• Select <b>Mobile Fixed Visit Verification</b> to use a FOB device with the Mobile App.		
	• Select <b>Mobile GPS Visit Verification</b> to use the smartphone's GPS software to approximate the location of the Caregiver when sending an EVV. Setting a <b>Tolerance Range (ft)</b> or an area		
	(measured in feet) surrounding the address of the visit is required for the EVV to successfully		
	be placed.		
	Note: These fields may be activated independently of one another; therefore, Agencies may set up the		
	system to accept GPS and FOB EVVs issued by the Mobile App, or just GPS or FOB EVVs.		
3	Click the <b>Save</b> button to register the selections.		



# Validate the Mobile ID

Once the Agency/Office has authorized the use of GPS and/or FOB EVVs through the Mobile App, the Caregiver's Mobile Profile must be linked to the system. Ensure that the Caregiver downloads and registers for the HHAX Mobile App on their device. Once registered, the Caregiver receives a 7-digit Caregiver Mobile ID number needed to link the two.

Complete the following steps to link the Caregiver.

Step	Action			
1	Navigate to Caregiver > Caregiver Search and select a Caregiver.			
2	Select the Profile link from the Index and click the <b>Edit</b> button.			
2	In the Demographics section, enter the Caregiver Mobile ID (7-digit number provided by the			
3	Caregiver when registering in the Mobile App).			
	In the <b>Mobile ID Type</b> select <i>Clinical</i> or <i>Non-Clinical</i> (described in the table below).			
	Profile Profile Log Print Profile			
	Demographics History			
	* First Name: Jon Middle Name:			
	* Last Name: Abreu * Initials: JA			
	• Gender: Male ▼ • DOB: 10/10/1988 ■ ① H			
	Caregiver Code: C11-1263 Time & Att. PIN: 100263			
	Alt. Caregiver Code:			
4	* SSN#: 111-23-4554 (i) H Ethnicity: Select *			
	Caregiver Profile: Mobile ID/Mobile ID Type			
	• Select <b>Clinical</b> to allow the Caregiver to access the Patient's clinical information on the Mobile			
	App.			
	• Select Non-Clinical to limit the Caregiver's access, not allowing access to the Patient's clinical			
	information on the Mobile App.			
5	Click the <i>Save</i> button to sync the Caregiver's Mobile App with the system.			

### Associate Unlinked Mobile App Caregivers with their Caregiver Profile

In the process of registering for the HHAX Mobile App, some Caregivers may incorrectly enter demographic information resulting in failure to pair them with their Profile in the system in addition to not appearing in the *Mobile User Management* page. In these cases, Providers can search for unlinked Caregivers using specified criteria and initiate a pairing to update the Caregiver information.



**Note:** If an Agency has made a mistake when entering a Caregiver Profile, the Agency is responsible for correcting the Profile prior to linking to the Caregiver's Mobile App information.

To search for unlinked Caregivers, navigate to the *Mobile User Management* page (*Admin > Mobile User Management*). Click on the *Find Unlinked Mobile Users* button from the Search page.

Mobile User Management		
Caregiver Mobile ID:	Office Name:	Last 4 SSN:
Caregiver Email ID:	First Name:	Last Name:
	Search Find Unlinked Mobile User	

Mobile User: Find Unlinked Mobile User

The *Find Unlinked Mobile User* window opens. Enter the **Caregiver Mobile ID**, required as denoted with a red asterisk, along with one or more identifying details (such as **First Name, Last Name**, Last 4 (digits of) **SSN**, **DOB**, **Email**, or **Phone Number**). Click *Search* to continue.

Enter Caregiver Mobile ID and mat	h at least 1 additional identifying	
piece of information to access unlir	ked Caregiver Mobile Record.	
* Caregiver Mobile ID:	1000009	
First Name:		
Last Name:		
Last 4 SSN:	2667	
DOB:		
Email:		
Phone Number:		

Find Unlinked Mobile User Window

The window expands showing a matching Mobile App profile at the bottom (if one is identified). From here, correct any mismatching values to ensure that both the **SSN** and **DOB** information matches, as seen in the image to the right. There must be values assigned to these fields (whether existing or changed) to save the changes. Click the *Save Changes* button to continue.

Navigate to the *Caregiver Profile* and re-enter the **Mobile ID** and *Save* for the system to link the system with the Mobile App.



Enter Caregiver Mobile ID and mat	tch at least 1 additional identifying	
piece of information to access unli	nked Caregiver Mobile Record.	
* Caregiver Mobile ID:	1000009	
First Name:		
Last Name:		
Last 4 SSN:	2667	
DOB:		
Email:		
Phone Number:		
	Search	
Matching Caregiver Mobile Profi	le Found.	
First Name:	James	
Last Name:	Kim	
* Last 4 SSN:	2667	
* DOB:	04/18/1980	
Email:	j@p.com	
Phone Number:	1235343434	
	Court Changes	

**Matching Caregiver Mobile Profile** 

#### Permissions for Search Unlinked Mobile User

By default, the Search Unlinked Mobile User permission is assigned for any role with the **Edit Mobile User Profiles** permission selected.

To assign permissions to a role, navigate to *Admin > User Management > Edit Roles*. Select *Admin* under the **Section** field and select applicable roles from the **Roles** dropdown. Select the **Search Unlinked Mobile User** checkbox and click *Save* to finalize.



Permission: Search Unlinked Mobile User

#### **Patient Multi-Address**

Multiple addresses can be entered for a Patient and be assigned to be used for GPS coordinates in the Patient Profile. In the address selection criteria includes *Primary Address* and *Allow GPS Address*, as described in the table below.



Address Type	Description						
	Unique for each Patient and required for the Patient Profile. The Primary						
Primary	Address is stored in the Patient Profile. At-least one Primary Address must						
	be defined.						
	(Optional) Can be selected in multiple address. This is the address used if						
Allow GPS	GPS is the chosen modality to clock in/out (from this address).						

Once saved, all entered Addresses appear under the *Address* section (as seen in the following image). The locator icon under the **Address Type(s)** column indicate that the address is GPS enabled. Under the **Notes** column, a note icon indicates if the address has a note attached.

dicite into incluie	1						_			
Name: Ar	cher Michael	Admis	sion ID: LIS-78	97654654321570	Patient ID:		Con	tract: Amazing Health		
DOB: XX	(/XX(/XXXXX	Primary Alt. Pat	ient ID:		Home Phone:	305-333-3333	Ade	dress: XXX, XXX, Coral & 33145	Gables, F	L,
Coordinators: Ke	enny Williams		Office: Lisset's	Office	Languages:	English				
Profile									Print	Profi
Demographics									H	istor
First Name: Michael					Middle Name:					
	Last Nan	ie: Archer			DOB: XX/XX/XXXX					
	Cent	hr: Nhie		<u> </u>	/////	nor inat r	Kinny Yillian s			2
		- ,,, - , - , -								
Address										
Address line 1	Address line 2	City	State	County	Zip	Cross Street	Primary	Address Type(s)	Notes	
1234 Coral Way		Coral Gables	FL	Miami-dade	33145		Yes	2	<u></u>	H
4500 Bird Road		Miami	FL	Miami-dade	33157		No	2		Ħ

Patient Profile: Multiple Addresses

On the Mobile App, the Patient Info tab shows multiple addresses if/as entered in the Patient Profile page (as illustrated in the image below).

				Coordinator 3:	Henry George		•	
	Back	visit Detail	(?) 🕀	Nurse:	Hostals Jenny		•	
		Andrew Tate	<u> </u>	EVV Required:	×			
			Careplan	Patient ID:	5435645			
		Patient Info		Medicaid Number:	(e.g.009999999999999999999999999999999999			
* Acc				Hedicare Number:				
		Andrew Jan Tate		HI Claim Number:				
		(Default Office)	,	wage Parity:	(Contract setup overrides patient setup)			
		. ,		From Date:	To Date:			
	Phone 1:	173-213-1231		From Date:	To Date:			
				HIE/RHIO Consent: 📃 🕔				
	Phone 2:	327-234-2353						
	111011012.	027 204 2000						
	Phone 3:	347-345-3453				4		
Address		0.11 0.10 0.100					Add	
Address Line 1				Zin	Front Street Primary	Address Type(s)	Notes	
25 W Fleder St., Suite 602	Address 1:	28 W Flagler St.,	Suite 802, MIAMI,	• 33130 -	2	Select •	Add X	
29 W flegler St., Suite 902		FL, 33130		• 33130 -		Select +	add 🔀	
30 W Flagler St., Suite 1002				• 33130 -		Select *	Add 🗙	
	Address 2:	29 W Flagler St.,	Suite 902, MIAMI,			Select *	Add 🔀	
Phone Number Information		FL, 33130						
	Address 3:	30 W Flagler St.	Suite 1002, MIAMI	Description:				
		FL, 33130		Description:				
Alternate I	Emergency Contai							
Billing/Mailing Information								
First Name:				Niddle Name:	(Base)			
Last Name:				Street:	diversity of the second s			
Zip:				City:	and the second se			
				State:				
Contract Contract Information								

Patient Multi-Address on Mobile App



**Note:** The Multiple Address feature in CMA 5.2.1 is not supported for Linked Patients and only displays the Primary Address.

### **The Mobile Device ID**

Agencies may restrict access to the Mobile App by linking the Caregiver's **Mobile ID** to a **Mobile Device ID**. To link these two values, Agencies must enter the **Mobile Device ID** in the Caregiver Profile (as illustrated in the image below).

Profile				Profile Log Print Profile
Demographics				History
* First Name:	Jon	Middle Name:		
* Last Name:	Abreu	* Initials:	JA	
* Gender:	Male 🔻	* DOB:	10/10/1988 📑 🚺 H	
* Caregiver Code:	CIT-1263	Time & Att. PIN:	100263	
(i) Caregiver Mobile ID:	1072902	i * Mobile ID Type:	Clinical 🔻	
Alt. Caregiver Code:		i Mobile Device ID:	1234679897743796	
* SSN#:	111-23-4554 i <u>H</u>	Ethnicity:	Select 🔻	

**Caregiver Profile: Mobile Device ID** 

Once a value is entered in this field, the system validates the **Mobile Device ID** each time the Caregiver logs in to the app. If the **Mobile Device ID** and **Caregiver Mobile ID** do not match, the system does not allow the Caregiver to log in.

**Note:** The Mobile App displays the **Mobile Device ID** when Caregivers login.

### Limiting Mobile App Access by Device

Caregivers may access the Mobile App from any iPhone or Android with the installed application. Some Agencies would prefer to limit Caregiver Mobile App access to a specific device. In these cases, the device must be linked to the HHAX system.

When initially registering on the Mobile App, the Caregiver receives a **Caregiver Mobile ID** that must be provided to the Agency to link the Caregiver with the HHAeXchange system. In addition, the app also assigns a **Mobile Device ID** accessed via the Profile options (as illustrated in the images below).







**Mobile Device ID** 



**Mobile Device ID** 

Note: In the example above, 5D737865-4014-403A-8E is entered in the Mobile Device ID field in the Caregiver's Profile.

To limit Mobile App Access, navigate to the Caregiver's Profile and enter the Mobile Device ID exactly as displayed in the Mobile App (as seen in the image below). Once saved, the Caregiver only has access to HHAeXchange through the Mobile App on the corresponding device.

Caregiver Info Active				
Name: Dunne Michael Team: Select Address: MIAMI,FL,33130	Caregiver Code: LIS-2357 Provider: Northeast Homecare Services Languages:	Office: Lisset's Office Phone: DOB: 10/19/1975 ()	Availability Updated: Caregiver Hours: H: 0 (1 V: 0	)
Profile			Profile Log Print	Profile
Demographics			Hi	story
* First Name:	Michael	Middle Name:		
* Last Name:	Dunne	* Initials:	MD	
* Gender:	Male 🗸	* DOB:	10/19/1975 E	
* Caregiver Code:	LIS-2357	Alt. Caregiver Code:		
<ol> <li>Caregiver Mobile ID:</li> </ol>	1645537	(i) * Mobile Type:	Select 🗸	
i Enable Mobile Chat:		(i) Mobile Device ID:	5D737865-4014-403A-8E	
Time & Att. PIN:	101357	<ol> <li>Enable Mobile App Biometric Two Factor Authentication:</li> </ol>		
* SSN#:	101-11-1111 () H	Ethnicity:	Select 🗸	
Rehire :	Rehire Date :	Country of Birth:		

Mobile Device ID Field, Caregiver Profile Page

If left blank, then the system does not validate the mobile device used to access the app.





# **Caregiver Availability**

Agencies/Offices have the option to allow Caregivers to edit their availability preferences using the

Mobile App. Follow the steps below to enable this functionality.

ep					Action				
L	Navigate to Ca	regiver >	Caregive	r Profile >	Availabilit	У			
	Select Caregive	er can se	t Availabi	lity option	s via Mobi	i <b>le App</b> che	eckbox.		
	Profile Compliance Calendar Visits In Service Rates	Caregiver Info Name: Sn Team: Address: LC	• Active nith Jack ING ISLAND CITY, NY, 11	Car	regiver Code: CIT-1061 Vendor: Northeast P Languages:	lomecare Services	Office: Citi Caregivers Phone: DOB: 01/01/1984 (1)	Caregiver H	Hours: H: 1.00 () V: 0
2	Notes Preferences Absence/Restriction Availability Payroll Info	Caregiver Permanent We	can set Availability op ek Availability	itions via Mobile App: 🖌	0				History
	Accruals Expenses Pay Check Patient Hx	Sunday 0800-0800	Monday 0800-0800	Tuesday 0800-0800	Wednesday 0800-0800	Thursday 0800-0800	Friday 0800-0800	Saturday 0800-0800	Edit X
	Others Document Management	Max Visits	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	<u>History</u> Saturday

**Note:** This is enabled on an individual basis. Repeat to enable per Caregiver.

# **Capture Patient Signature**

When the **Capture Patient Signature** function is activated, Caregivers are prompted to provide a Patient signature when Clocking In and/or Out of a visit. Even if required, Patient signatures do not serve as a valid EVV compliance measure. Visits that require a **Patient Signature** are not sent to the Call Maintenance Exception page (when not provided). Additionally, the system cannot determine whether the signature is authentic.

It is up to the Agency to configure these settings, based on a Contract Level via the Scheduling/Confirmation tab in the Contract Setup page (*Admin > Contract Setup > Search Contract > Scheduling/Confirmation*) and with the Reference Table Management function (*Admin > Reference Table Management*).

Changes can be applied to both Internal and Linked (Payer) Contracts. Under the *Visit Confirmation Options* section, two checkboxes become available once 'At Clock In' and/or 'At Clock Out' checkboxes are selected under the **Capture Patient Signature on Mobile App** field titled **Allow Signature Skip** and **Require Timesheet if EVV linked to visit w/o Signature**, as seen in the instructions below.



Complete the following steps to activate and review Patient Signatures.

Step	Action
1	Navigate to the <i>Admin &gt; Contract Setup &gt; Search Contract</i> .
2	Select the Scheduling/Confirmation tab and navigate to the Visit Confirmation Options section.
	On the Capture Patient Signature on Mobile App field, select At Clock In and/or At Clock Out
	checkboxes. From here, select options to Allow Signature Skip and Require Timesheet if EVV
	linked to Visit w/o Signature (as described in the bullets below the image).
	Ganard Billing Datas Billing (Collection Scheduling (Confirmation Sinibility Outchbooks Notes (Holoade
	Scheduling Configuration History
	Contract Compliance     Contract     Contract Compliance     Contract Compliance     Contract Com
	Pet baty Compliance Sufficient Documentation: Scanned Clinical Document ()
	Count Refused Duties Toward 0 1 Allow linking of EVV verifications not 0 0 recognized as belonging to Patient:
	Action Taken  A
	Uset and time vermed Service Code
	Validate Visit Confirmation Matches 🗐 🛈 Capture Patient Signature on Mobile 🔮 At Clock in 🕕 Duty Minutes: App: 🦉 At Clock Out
	Disable Visit Confirmation Rounding: 🖉 (1) Timasheat Options
	Capture Patient Signature
3	• Allow Signature Skip: This option allows a Caregiver to skip the Patient Signature; however,
	the Caregiver must provide a <b>Reason</b> as to why the Patient could not sign at visit Clock-In
	and/or Clock-Out on their mobile device.
	• <b>Note:</b> If a signature is required on Clock-In/Clock-Out for an <u>existing contract</u> , the <b>Allow</b>
	<b>Signature Skip</b> checkbox is selected by default and Caregivers are required to provide a <b>Skip</b>
	<b>Reason</b> . If the Agency unchecks the <b>Allow Signature Skip</b> checkbox and requires a signature,
	then the Caregiver cannot move forward on the mobile app <b>until a Signature is provided</b> .
	• Require Timesheet if EVV linked to Visit w/o Signature: In addition to selecting the Allow
	Signature Skip checkbox, selecting this option requires a timesheet for the visit if a Patient
	refuses to sign at the time of Clock In and/or Clock Out. When the Signature is skipped, the
	Timesheet Required flag is automatically selected on the Visit Details page and the Caregiver
	receives a notification from the respective Agency.
	• <b>Note:</b> If <b>Timesheet Required</b> is already selected on the Contract Setup page, then the
	Caregiver does not receive notice.
4	Click the <b>Save</b> button to register the selections.



### **Reference Table Management**

To create or edit Skip Signature reasons, go to the Reference Table Management (*Admin > Reference Table Management*) and select the *Patient Signature Required Skip Reason* in the **Reference Table** field, under the Visit category. Active options appear on the Caregiver's mobile device.

Although Skip Reasons are Agency-specific, there are two standard default options for all Agencies: **Patient Refused** and **Patient Unable to Sign**.

rch			
erence Table:	Patient Signature Required Skip R 🔻	Search	Legen
Reason:		Reason Description:	Status: All
Search Result	s (58)	Search	Page 1 of 3   Next Last
Reason ID	Reason	Reason Description	Status
1	Patient Refused	Patient Refused	Active
2	Patient Unable to Sign	Patient Unable to Sign	Active
3	Feeling Weak2	Due to fever not feeling well	Active
4	Patient Not Interested		Active
5	Running Late For Bank	Test	Inactive
<u>6</u>	Patient Test		Active
15	Patient is busy with family	Patient is busy with family	Inactive

**Reference Table: Patient Signature Reqired Skip Reasons** 

To add a Skip Reason, click the *Add* button on the Reference Table page to open the Patient Signature Required Skip Reason window. Enter a **Reason** title (required) and a **Reason Description** in the open text field. Ensure the **Status** is set to *Active*. Click *Save* to add to the options.

tient Signature Required Skip Re	ason
*Reason:	(100 Characters Limit)
Reason Description:	(200 Characters Limit)
Status: Active T	
	Save Cancel

**Create Skip Reason** 

# **Caregiver Note**

When a Patient Signature is required and the Patient refuses or cannot sign, a Caregiver Note is created and stored in the Caregiver Notes page (*Caregiver > Notes*), as seen in the image below. The note provides the visit details and informs the Caregiver that a Timesheet is required. This message also displays on the Mobile App in the *Message* section.



Profile	Caregiver Info Active								
Companie Calendar Visits In Service	Name: Amy Adams Team: Blue Team Address: XXX & XXX		Caregiver Code: HHA-197 Vendor: Excellence Languages:		Office: <u>HHAeXchange Office</u> Phone: DOB: XX/XX/XXXX (j)		Caregiver Hours: H: 0 ( V: 0		i
Notes Preferences	Notes								
Absence/Restriction Availability Payroll Info	From Date:			To Date:		Type: -All-	~		
Expenses									
Pav Check Patient Hx	Date		<u>Subject</u>	Note		<u>User Name</u>	Patient	Add	
Others Document Management Search	9/25/2018 9:56:55 AM	⇔	[Mobile/Text Message]	Dear Amy . As a result of Skipping Pandey in NEW YORK on 09/25/2018 now required to provide a Timesheet	g the Signature for ramyaas 8 from 0930 - 0945 you are 5. Sincerely, Excellence	Caregiver		<u>Edit</u>	<b>X</b>
First Name:	9/24/2018 7:34:35 AM	₽	[Mobile/Text Message]	Dear Amy . As a result of Skipping Pandey in NEW YORK on 09/24/2018 now required to provide a Timesheet	g the Signature for ramyaas 8 from 0730 - 0745 you are 2 Sincerely, Excellence	Caregiver		Edit	

**Caregiver Notes – Skipped Signature Note** 

Note: If Timesheet Required is selected at the Contract level, the Caregiver does not receive the alert.

# Call Maintenance, Link-Unlink Call In/Out Related Changes

Regardless of whether the call appears on the Call Dashboard, if the Caregiver has skipped the signature, a **Note** is generated and a **Timesheet Required** flag is set on the *Visit Details* page. The system can generate a **Patient Signature** report (*Report > Visit > Visit > Patient Signature*) capturing reasons when a required signature is skipped.

<b>ж</b> нна	eXchange			Patient	Signat	ture		Page 1 of 11		
~	Report I							Date: 09/26/2018 12:55 PM		
Office(s): HHAeXchange Office,										
Fro	m Date: 5/1	/2018		To Date	: 9/26/201	8	Contr	ract: All		
	Patient: All			Caregiver	: All					
Coor	dinator: All			Discipline	: All		Signature Sta	tus: Skipped		
Caregive	r Team: All		Caregi	iver Location	: All		Caregiver Bra	nch: All		
Patier	t Team: All		Pati	ent Location	: All		Patient Bra	nch: All		
Visit Date	Patient	Contract	Caregiver	Sched / Conf	EVV Method	Clock In Signature	Clock Out Signature	Skip Reason(s)		
9/25/2018	Barbara Lee	CONTRACT X	Amy Adams	0815-0830 0815-	GPS	Skipped		I: Patient Refused O:		
9/25/2018	Jason Masters	CONTRACT X	Beth Bayer	0830-0845 0915-	GPS	Skipped		I: Patient Refused O:		
9/19/2018	Guy Lomax	CONTRACT A	Amy Adams	0300-0315 0331-0332	GPS	Skipped	Skipped	I: Patient Refused O: Patient Refused		
9/21/2018	Barbara Lee	CONTRACT X	Amy Adams	1030-1045 1044-	GPS	Skipped		I: Patient Refused O:		
9/18/2018	Jason Masters	CONTRACT X	Beth Bayer	0600-0615 0724-0746	GPS	Skipped		I:Patient Refused O:		
9/18/2018	Barbara Lee	CONTRACT X	Will Winters	0615-0630 0938-	GPS	Skipped		I: Patient Refused O:		
9/19/2018	Bob Anderson	CONTRACT <sup>®</sup>	Beth Bayer	0230-0245 0322-0327	GPS	Skipped	Skipped	I: Patient Refused O:Patient Refused		

**Patient Signature Report** 



# **Mobile Application Recipient**

The Mobile App communication functionality allows Caregivers and system users to communicate via

HHAX's internal correspondence tools. To use this functionality, Agencies must create Mobile

*Application Recipient Groups* (group of message recipients) via the **Reference Table Management** function.

Complete the steps below to *add* or *edit* a Mobile Application Recipient Group.

Step	Action							
1	Navigate to Admin > Reference Table Management.							
	From the Reference Table dropdown, select Mobile Application Recipient (under the General							
	category). Click the <b>Add</b> button to create a new Group. Click on the <u>Group Name</u> (link) to edit an							
	existing Group.							
2	Reference Table Management Enterprise 9.3.1.1 TEXMITAD2 (HELE 10.6) IE 11 (Doc IE 10) 3/30 14-3 Search							
	Reference Table: Mobile Application Recipient V Gearch Legend							
	Group Name Group Description Recipients Status Coordinator Patient Coordinator Group Geb Boris, G Boris, Geb Boris, G Boris, Franqui Jon, Putter Mark Active							
	Non-Coordinator Group Pran Dan, Guide Greg Active Administrator Indiministrator Group Putter Mark Inactive							
	Reference Table: Mobile Application Recipient							
	The Mobile Application Recipient Group window opens. Complete or edit the required fields							
	(described under the image).							
	Mobile Application Recipient Group History							
	Group Name: Coordinator							
	* Recipients: [Multiple]							
	Status: Active							
	Save Cancel							
3	New Mobile Application Recipient Value							
	• Group Name: Name the Group intended to receive the Mobile App message (such as							
	Coordinator, Administrator, etc.).							
	• <b>Group Description:</b> Enter a brief description of the Group (such as Patient Coordinators).							
	• <b>Recipients:</b> Select the recipients of the Mobile App messages from the multi-select dropdown							
	(populated with system users).							
	• Status: Active (make available) or Inactive (deactivate the Group)							



Step	Action
л	Click the Save button to finalize. Moving forward, Caregivers select the applicable Mobile
-	Application Recipient Group to send a message from the Mobile App.

#### **Reviewing Mobile App Messages**

Mobile App messages can be reviewed on the *Notifications* tab on the *Home* page or on the **Note** page of the Caregiver Profile (as illustrated in the images below).

🔆 HHAeXchange	Home Patien	t Caregiver	Visit Action	Billing Report Admin	Notification Messages ToDo's Open Cases	-
						Chrome/53.0.2785.116) chrome 53 (Doc Chron 9/23 15::
Link Communication	Notifications (36	0 <del>0</del>				
Notifications (35						Manage Notifications
<u>  </u>						
Save						
Messages (1)						New Message Manage Messages
Received Date (	Erom	Tune	Priority		Nerrage	Page 1 of 1
09/23/2016 15:29	Franqui Jon	Mobile/Text	Medium	All caregiver mobile app messa meant to determine the import	ges will appear here. All messages may have 1 of ince of the correspondence.	3 "priorities", which are Reply

Mobile App Message, Home Module

<b>Caregiver Info Active</b>											
Name: Franqui Jon Team: Address: SUNNYSIDE, NY, 11104 ®		Ca	regiver Code: LIC-1065 Vendor: Northeast Homecare Services Languages:	Office: Long Island City Phone: DOB: 01/01/1990 (1)		Caregiver Hours: H: 0 V: 0		0 (1 0	D		
Notes											
From Date:	From Date: To Date: Type: -All-										
<u>Date</u>		<u>Subject</u>	Note	<u>User Name</u>	Caregiver Notified	Patient	Add				
9/23/2016 4:33:47 PM	₽	[Mobile/Text Message]	On 09/23/2016 15:29, Jon Franqui Wrote : All caregiver mobile app messages will appear here. All messages may have 1 of 3 "priorities", which are meant to determine the importance of the correspondence.	Caregiver	Mobile App		<u>Edit</u>	0	X		
9/23/2016 4:33:47 PM	⇒	[Mobile/Text Message]	This is a Caregiver Observation for Jon Franqui (the Caregiver)	Caregiver	Mobile App		<u>Edit</u>		x		
9/23/2016 4:32:51 PM	⇔	Caregiver Observations, [Mobile/Text Message]	This is a Caregiver Observation for Jon Franqui (the Caregiver)	Caregiver	Mobile App		<u>Edit</u>	0	X		
	-	[mobile/rext Message]	caregiver)	onare-Bateria	Арр				_		

Mobile App Message, Notes Page



# **Agency Management**

### **Call Maintenance**

Issues with GPS-based EVV placements are routed to the **Call Maintenance** page. The following are three status issues regarding GPS confirmation. Any GPS EVV routed to Call Maintenance with any of the below-listed status cannot be linked to a visit.

The only course of action with these issues is to <u>reject</u> the EVV.

Status	Description (Issue occurs)
	when a Caregiver places a GPS EVV with the location services turned
GPS Signal not Detected	off on their device. This blocks the system from verifying if the
	Caregiver is within range of the Patient's address.
GPS Signal Out of Range	If a Caregiver attempts to place a GPS EVV outside the designated
Gi S Signal Out of Range	Tolerance Range.
Unscheduled–Patient Not	When a GPS-based EVV is placed and cannot be connected to a
Selected	Patient.

Aside from the above-listed status, other GPS-based EVV (such as **No Schedule on Calendar** or **Potential In/Out Mistake)** may end up on the **Call Maintenance** page. To distinguish GPS issues on the **Call Maintenance** page, a GPS icon displays to the left of the status (as illustrated in the image below).

Search Resu	lts Total	Calls (21)	1	Automat	ic Creation of S	chedules Reprocess Le	gend
<u>Assign. ID#</u>	Caregiv Code	ver Caregiver Name	Office Nar	n <u>e</u> <u>Call Type</u>	Caller ID	<u>Status</u>	Action
100039	<u>1039</u>	Deere Tom	Citi Caregiy	<u>IN H</u>	<u>917-855-4182</u>	No Schedule on Calendar	<u>Reject</u>
100001	<u>1001</u>	<u>Smith Jack</u>	Long Island	<u>оит н</u> <u>(5)</u>	NA	No Schedule on Calendar	<u>Reject</u>
100001	<u>1001</u>	Smith Jack	Long Islan.	IN H	NA	📩 No Schedule on Calendar	<u>Reject</u>

The GPS Icon on Call Maintenance



# **Caregiver Visit Notes**

When a Caregiver enters a visit note from the Visit Detail page of the Mobile App (Visit Text Note, Visit Voice Note, or Visit Image Note), a Visit Note icon appears on the Calendar for that visit (as seen on the image below).

	12
S:1000-1200	(i)
V:1037-1217	10
B: N (01:40)	<b>H</b>
Thomas	X
Lily	_

Calendar: Visit Note icon

The Visit Note can be viewed in at the bottom of the *Visit Info Tab* (**Mobile App Multimedia** section) or at the bottom of the Patient's *General* page (**Notes** section), as illustrated in the images below.

Mobile App Multimedia									
Туре	File Name	Size	Description						
Note	Mobile Note: [Gloria Perez 03/23/2016 1:06 PM]		Czech						
Voice	Mobile Voice: [Gloria Perez 03/23/2016 1:06 PM]	0.03 MB	N/A	٢					

#### Visit Info Tab, Mobile App Multimedia Section

Notes										
1234										
Date 👻	From	Note	Reason	Caregiver						
11/17/2016 1:30:09 PM	MarkNE	Last time Aide worked : 05/06/2016 [Wednesday(1000-1200) ] (Type: Temporary, From Date: 11/02/2016, To Date: 11/02/2016, Replacement Aide: Perez Gloria )	change in service		Print	0				
3/23/2016 1:06:55 PM	[Caregiver]	Mobile Voice Message From Gloria Perez Received 03/23/2016 13:06:55	Mobile Audio	Perez Gloria		٨				
3/23/2016 1:06:31 PM	[Caregiver]	Mobile Note Message From Gloria Perez Received 03/23/2016 13:06:31 Czech	Mobile Note	Perez Gloria						
2/22/2016 4:04:23 PM	[Caregiver]	Mobile Voice Message From Gloria Perez Received 02/22/2016 16:04:23	Mobile Audio	Perez Gloria		٨				
2/22/2016 4:03:55 PM	[Caregiver]	Mobile Image Message From Gloria Perez Received 02/22/2016 16:03:55	Mobile Image	Perez Gloria		1				

Patient > General Page: Notes section

### **Signature Report**

Although the **Patient Signature** is not a valid EVV compliance measure, it may be used as an auditing tool. Running the **Patient Signature** report allows an Agency to ensure Patients are providing signatures when required. Moreover, the report provides Patient signatures to be verified for consistency measures.

To run and review a **Patient Signature** report, navigate to **Report > Visit > Visit > Patient Signature**:



🔆 HHAeXchange			Pa	tient Sig	nature	Re	Page 1 o port Date: 03/23/2016 04:29
Fre	om Date: 3/1	1/2016		To Date:	3/31/2016	i	Contract: All
	Patient: All			Caregiver	: All		
Coordinator: All				Discipline	: All	Signate	ire Status: All
Caregive	Caregiver Team: All		Caregiver Location: All			Caregiv	er Branch: All
Patier	nt Team: All		Pati	ent Location:	: All	Patie	nt Branch: All
Visit Date	Patient	Contract	Caregiver	Sched / Conf	EVV Method	Clock In Signature	Clock Out Signature
3/23/2016	Soprano Tony (900028)	Heaven's Care	Perez G ( 1060 )	1245-1300 1245-1254	GPS/GPS	N	N/A
3/15/2016	Fisher Max ( 900057 )	Heaven's Care	Perez Gloria (1048)	1100-1200 1113-1209	FOB/GPS	Man Ful	MF out
3/21/2016	Soprano Tony (900028)	Heaven's Care	Perez G ( 1060 )	1000-1015 1007-1008	GPS/GPS	-5	N/A
3/21/2016	Fisher Max ( 900057 )	Amazing Health	Perez Gloria (1048)	1045-1100 1045-1103	FOB/FOB	ME1	ME
3/23/2016	Fisher Max ( 900057 )	Amazing Health	Perez Gloria (1048)	1245-1300 1240-1247	GPS/GPS	$\rightarrow$	an
3/23/2016	Fisher Max (900057)	Amazing	Perez Gloria (1048)	1300-1315	FOB/FOB	3	Min

#### Patient Signature Report

In addition to the Patient signatures, the report provides Visit Date, Patient, Contract, Caregiver, and

Hours (Scheduled/Confirmed).

*Note:* If either the *Clock In Signature* or *Clock Out Signature* fields contains an *N/A* value indicates that a signature is not required.



# **Case Broadcasting via Mobile App**

The **Mobile App 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 press the checkmark (express interest) or the X (uninterested) to open work shifts, as seen in the image below.



Broadcasted Shifts on Mobile App

- When <u>interested</u> in an open shift (✓), the request is logged in Enterprise and sent to the Broadcast Dashboard for further assignment by the Coordinator.
- When <u>uninterested</u> in an open shift (X), 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; <u>or</u> assigns or rejects the Caregiver's requests.

#### IMPORTANT

The Caregiver must be logged in to the Mobile App to review Case Broadcasts in the Open Shifts screen.



# **Broadcast Dashboard**

The **Broadcast Dashboard** page 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:

- 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**

In the *Reference Table Management* functionality, use the **Broadcast Reject Reason** dropdown field to create and manage the Broadcast Rejection Reason on open shifts.

Request Rejection Reason	<u> </u>	listo
* Reason:	Shift no longer available (100 Characters Limit)	
Reason Description:	This Shift is not available now (200 Characters Limit)	
Set as Default:	✓ (ì)	
Status:	Active 🔽	
	Save Cancel	

#### **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 may 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.



Re	ference Table Mai	nagement		TELXQAUATD03.0	) IE 11 (Doc IE 10) 1/25 16:5				
1	Search								
	Reference Table:     Broadcast Reject Reason     Search								
	Search Results	; (20)			Add				
					Page 1 of 1				
	Reason ID 🔺	Reason	Reason Description	Default	<u>Status</u>				
	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 testt	THis is test	No	Active				
		્રિક પ્ર્કુર પ્રદ્	///////////	No	Toa ke				
				· · · ·					
	80	test 123	rasorasoras ronorgnorg ronjronjr orgno	NO	Active				
	<u>81</u>	Patient Preferred	Patient requested a preferred Caregiver Type	No	Active				

**Reference Table Management: Broadcast Reject Reason** 

### **Office Setup**

Navigate to *Admin > Office Setup* to access the Mobile settings and select the applicable fields in the **Open Case Settings** section, as illustrated in the image.



#### Office Setup: Open Case Settings

These settings determine the configuration for all new Caregivers, who have a matching set of options on the Caregiver level. The following table provides a description for these settings.

Description (If selected)
Caregivers can see the section for <b>Open Cases</b> on their Caregiver Mobile App. <i>Note:</i> Viewing open cases shows shift details to Caregivers. <b>Request and Accept Open</b> <b>Cases</b> must be selected to submit requests for these visits.
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>
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 <b>Request and Accept Open</b> <b>Cases</b> must be selected for this option to be available.



### **Caregiver Setup**

To setup 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							Histo		
o	pen Case Acceptance:	✓ View Open Cases (i) ✓ Request and Accept (	Open Cases 🚺	Open Case Acceptance: Request Limit: 🖌 9000 🚯					
	Set Availability: 🗹 🕕								
Permanent Week A	vailability						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							Histo		
Mon	day Tue	esday Wed	nesday	Thursday	Friday	Saturday	Sunda		
	<u>99</u>	<u>99</u>	<u>99</u>	<u>99</u>	<u>99</u>	<u>99</u>	2		
			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:

#### For Single Shifts:

- User has the "Broadcast Open Case" permission enabled
- Visit date must be either the Current Date or Future Date only



- Visit is not Confirmed
- Visit is not Billed

#### For Master Week:

- User has the "Broadcast Open Case" permission enabled
- 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.

If 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**

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

Master Week							History
11/01/16 - Monday Alt.	Tuesday Alt.	Wednesday Alt.	Thursday Alt.	Friday Alt.	Saturday Alt.	Sunday Alt.	
Quick Broadcast		1400 - 1800					<b>≝</b> [X]H
		Temp Temp					
Assi. ID:		010101					
Pay Code:Select V	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	
POC:Select	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	
Bill To:Select 🗸	Select 🗸	Musician Healthc 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	
H: 00 M: 00	H: 00 M: 00	H: 04 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	
Service Code:Select V	Select 🔽	HSK-Daily-0001 🔽	Select 🔽	Select 🗸	Select 🔽	Select 🔽	
Rate Type:		Daily					
1 Sec.Bill To:Select V	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	
H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	H: 00 M: 00	
Service Code:Select	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	Select 🗸	
Rate Type:							
Include in Mileage:							
From Date	8/30/2017	To Date: 9/13/2017	Save & Update	Calendar Add Ma	ister week		
				*Maste	<ul> <li>[Update Calendar]</li> <li>Week will create sche</li> </ul>	will update only unbill dules only for Active o	ed visits ontracts

Master Week Broadcasting

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

HHAeXchange - Quick Broadcast	×
Quick Broadcast	
Open Shift will broadcast to Caregivers m Patient. Restricted, declined, and inactive	atching the Primary Office and shift discipline of the Caregivers are not included.
Broadcast Note:	^
	Y
Note: Upto 500 Characters	
Broa	dcast Cancel
Broa	dcast Cancel



#### **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 <u>after</u> broadcast still see matching cases.

If **Matching Caregivers** is selected, the *Matching Caregivers* window populates as illustrated in the image below. From here, users can 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* may be selected.

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

·	_
HHAeXchange - Matching Caregivers	×
Matching Caregivers	
Open Shift will broadcast to all Caregivers matching the criteria selected below. Restricted, declined and inactive Caregivers are not included.	~
	- 11
Master week Details	
Dates Discipline(s) Schedule Times	
01/04/2018-01/11/2018 HHA Mon:0830-0900 Tue:- Wed:- Thu:- Fri:- Sat:- Sun:-	
Caregiver Details	
Office: HHAeXchange Office 🔽 Include Caregivers in Secondary Office: 🗌 🛈	
*Availability Preference: Preferred	
Team: All V Location: All V Branch: All V	1
Location	
Miles: From: O Zip Code:	
Patient Address: SCHENECIADY,NY,12345	
Requirements for Scheduling	
Care'/ Ref Demo Pref one	
Patient Ref Test1 Test889	
Broadcast Note:	i
^	
×	
Note: Lloto 500 Characters	
	$\sim$
Broadcast Cancel	
147 13/07/17 Nonday Alt. Tuanday Alt. Madaanday Alt. Thursday Alt. Fuiday Alt.	Cohund

#### **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 below and described in the table under the image.

×	Quick	Edit Broadcast
		Revoke Broadcast
		Review Requests
		Received Broadcast

Option	Description (If selected)								
Edit Broadcast	Allows the Coordinator to edit the Broadcast using the Matching Caregivers window.								
Revoke Broadcast	Removes the Broadcast from all Mobile Apps, whether Caregivers have seen or requested the case. The Coordinator is prompted to confirm the revocation.								
Review Requests	Opens the <b>Broadcast Dashboard</b> to the Requests tab prompting a search generating only the requests for this Master Week.								
Received Broadcast	The Caregivers That Received This Broadcast popup window lists all Caregivers who gave the shift a "thumbs up" to request the case (shift) on their Mobile App. Selecting the Caregiver's Name (hyperlink) opens the Caregiver's Profile.								

•	Rejected - has requested the shift or Master Week but their request has been
	rejected.
	Request Pending - has requested the shift or Master Week and no action has
	been taken.

*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.

#### Master Week > Change Caregiver

Except for **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**

**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 previous sections, <u>Broadcasting</u> and <u>Options after Broadcast</u> 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.

Schedule	risit Info	Bill Info					
Schedule:							History
* Schedule Tim	e: 1000 - 1300	Temporary		Caregiver Code:	1000 Temp Temp 📡 ◀	?	Temporary
РО	C:Select	~		Assignment ID: Pay Code:	010101 Select	~	
* Primary bill t	o: Private Pay	~	<u>History</u>	Secondary bill to:	Select	<b>v</b> (1)	History
* Service Cod	e: The Service Code	~		Service Code:	Select	$\checkmark$	
	* H: 03 M: 00				H: M:		
Bill Typ	e: Hourly			Bill Type:			
				Include in Mileage:	1		
Visit Typ	e: HHA						





#### Visit Search Page Location

On the *Visit Search* page, view 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**.

Visit Search								Enterp	ise 8.0.1.0	TELXWE	B07 (MSIE 10.0	) IE 11 (Doc IE 10) 8/2	22 15:25 EST
Visit Search													
Fro	om Date: 8/22/201	17	To Date:	8/22/2017			Office(s): All		~		Discipline:	All	~
Patient Las	st Name:		Patient First Name:			Adn	nission ID:				Contract:	All	~
Coor	rdinator: All	~	Patient Team:	All	~	Patient	t Location: Se	lect	~	Pa	atient Branch:	All	~
Caregiver Las	st Name:		Caregiver First Name:			Careg	iver Code:			A	ssignment ID:		
Caregive	er Team: All	~	Caregiver Location:	Select	~	Caregiv	er Branch: All		~		Timesheet:	All	~
	Billed: All 🗸		Paid:	All 🗸		Search Open S	Schedules: 🗌						
Search Results	Total Visits : 8	Total Call In : 0	Total Call Out : 0		Search						×	Page Loaded in 0.227	second(s).
Coordinators	Admission.ID	Patient Name	Caregiver Code	Caregiver Name	Assignment ID	Office	Visit Date 🔺	Schedule	Visit	<u>I</u> 0	1	Quick	
lick Folk	900009	Rooney Michael	1004	Cox Sandra	100004	Brotherly Love	08/22/2017	2100-2200		N N			J 🖹 🛛
amie Patron	900021	Johnson Danny			010101	North NYC	08/22/2017	0900-1300		N N	N N Time	еs нна 🗹 🤅	â 📡 🛛
amie Patron	900010	Rainer Sally	1016	Walsh Brenda	100016	North NYC	08/22/2017	0900-1100		N N	<b>N</b>		
Visit Search Page: Viewing Broadcasts												Matching	

### **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.





# **Broadcast Dashboard**

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

Bro	adcast Dasl	board							Enterprise 9.2.1.0 7/	ELXQAUATDO.	1 (MSIE 10.0) IE	11 (Doc IE 1	10) 1/19 06:11 ES
Shif	t Requests												
v	iew By: 🔘 :	Single Shifts 〇 Master We	eks	Office(s):	All	~		Coordi	ator: All		Contract: All		~
	Status: All	~	Pat	ient Name:					Feam: All	]	Location: All		~
E	ranch: All	~		Visit From: 0	1/19/201	8		Vi	iit To:	• 0	iscipline: All		~
						s	arch						
Sea	Search Results Total Open Shifts: 44 Total Shift Requests: 3 Page 1 of 2   Next Last												
	Date	Patient	Coordinator	Visit	Discipli	e Contract			Address		Phone		Status
ŧ	02/21/2018	08052016, Patient	Ram Lakhan	0500-0700	RN				302 Olive Arcade1, CG Road1, NE Y, 10032	W YORK1, N	<u>111-222-1111</u>	Requests	No Requests
	02/11/2018	08052016, Patient	Ram Lakhan	0500-0600	нна			302 Olive Arcade1, CG Road1, NEW YORK1, N Y, 10032			111-222-1111	Requests	Requested
			Caregiver	Requested	En Ty	ployment	Hours	Addres	s	Phone		Assign	Reject
			100 million and 1000	01/04/2018 12	:28 HH	A	00:00	Greenv dmark O, TN,	lle near US hosiptal, Near U, Lan lear Gala Residancey, stre, ALAM 18001	000-111-22	22 Preferences	Assig	n Reject
Ð	02/10/2018	08052016, Patient	Ram Lakhan	0400-0530	нна				302 Olive Arcade1, CG Road1, NE Y, 10032	W YORK1, N	111-222-1111	Requests	Requested
			Caregiver	Requested	En Ty	ployment pe	Hours	Addres	s	Phone		Assign	Reject
				01/01/2018 04	:22 RN	, PT, OT	00:00	long ad ng addr shtra, k	dress 123456 to tst UI abcde, //lo ess 123456 to tst UI abc, mahara Y, 41101	565-645-64	54 Preferences	Assig	n Reject
			-	01/04/2018 12	:28 HH	A	00:00	Greenv dmark O, TN,	lle near US hosiptal, Near U, Lan lear Gala Residancey, stre, ALAM 18001	000-111-22	22 Preferences	Assig	n 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
Expand/Collapse	Click the + / - box to expand or collapse shift details.
Date of Broadcast	The date of the shift.


Column	Description
Patient	Patient Name. Click hyperlink to access a summary popup and to navigate to
ratient	the Patient Calendar.
Coordinator	Patient Coordinator
Visit	Visit scheduled time. Click hyperlink to access the Visit Edit details popup.
Discipline	Discipline of the Service Code scheduled.
Contract	Primary Contract for the visit.
Address	Patient's Address. Click hyperlink to open the popup and navigate to Google
Address	Maps for this location.
Phone	Patient's Home Phone. Click on the hyperlink to show additional phone
Thome	numbers for the Patient to include Emergency Contact.
	Hover over the Requests hyperlink to access Patient Preferences to include
Requests	Primary and Secondary Language, Preferred Gender, and other preferences.
	Click on the hyperlink to access the Caregiver's Preferences.
	Indicates the Status of the Open Shift:
Status	• <b>Requested:</b> At least one Caregiver has requested the shift.
	• No Requests: No Caregiver has requested the shift.

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.

Sea	Search Results Total Open Shifts: 3 Total Shift Requests: 2 Page 1 of 330 NextLast													
Date	e	Patient		Coordinator	Visit		Discipline	Contract		Address	Phone		Status	
01/0	03/2016	Allen, Kenneth		Sandra Jones	<u>0800 - 1</u>	1400	нна	Senior Health Partners		123 Fake Street, Trenton, NJ, 11215	555-555-55555 Requests		Requested	
				Caregiver		Reque	sted	Employment Type	Hours	Address	Phone		Assign	Reject
				Smith, Jane (1003	4)	1/19/2	016 10:23	HHA, HSK	32:00	55-22 3rd Avenue, Princeton, NJ, 11215	<u>123-456-7890</u>	<b>Preferences</b>	ASSIGN	REJECT
				Andrews, Tina (1	002)	1/19/2	016 14:15	нна	00:00	112 Richard Lane, Hamilton, NJ, 11381	242-292-2215	<b>Preferences</b>	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.



Column	Description
Employment Type	Caregiver disciplines as noted in the system.
	The Caregiver's hours for the Payroll Week of the selected date. The system
Hours	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
Address	Google Maps for this location.
Phone	Caregiver's Home Phone. Click on the hyperlink to show additional phone
Thone	numbers for the Caregiver to include Emergency Contact.
	Hover over the Preferences hyperlink to access Caregiver Preferences to
Preferences	include Languages and other preferences. Click on the hyperlink to access the
	Caregiver's Preferences.
	Each row has an Assign (green) and Reject (red) button for Coordinators to
Assign / Reject	assign Open Shifts. To assign or reject a shift, users must have Edit Schedule
	permissions.

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

#### Assigning a Shift Request

When selecting **ASSIGN**, 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 **REJECT**, 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 below.

HHAeYcha	nge - Dejection Descon	
ППАСАСНА		<b>•</b>
Caregive	r Name	
Jackson, M	ari (EXQ-1054)	
* Reason:	Broadcast Rejection Reasons	<b>v</b>
Natas		^
Note:		$\sim$
	Reject Cancel	

**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		Office: All		$\mathbf{\vee}$			Coordinat	tor: All	]	Contract: All		~
Status:	All	~	Patie	nt Name:					Теа	im: All 🗸	1	Location: All		~
Branch:	All	<b>~</b>	Start Da	te From:					Start Date	To:		Discipline: All		<b>~</b>
							Searc	h						
Search Results	Total Open Mas	ter Weeks: 3	Total N	laster Week Ree	quests: 2								Page 1 of 3	30 Next Last
Date	Patient	Coordinator	Visit	Dis	scipline	Primary Paye	er	Contract		Address		Phone		Status
04/01/2017-04/1	I/2017 Allen, Kenneth	Sandra Jones	M:0800 - 1400	W:0800 - 1400 HH	А, НЅК, НМК	Bergen		Senior He	alth Partners	123 Fake Street, Trenton, NJ, 1	1215	555-555-55555	<b>Requests</b>	Requested
	Caregiver			Requested		Employment Type	Master W	eek Hours	Address		Phone		Assign	Reject
	Smith, Jane	(10034)		1/19/2016 10:23		HHA, HSK, HMK	32:00		55-22 3rd Ave	enue, Princeton, NJ, 11215	123-456-7890	Preferences	ASSIGN	REJECT
	Andrews, Ti	na (1002)		1/19/2016 14:15		HHA, HSK, HMK	00:00		112 Richard L	ane, Hamilton, NJ, 11381	242-292-2215	Preferences	ASSIGN	REJECT
04/01/2017-04/1	I/2017 Allen, Kenneth	Sandra Jones	M:0800 - 1400	W:0800 - 1400 HH	A	Manhattan	Partner	s Senior H	ealth Partners	123 Fake Street, Trenton, NJ, 1	1215	555-555-5555	Requests	No Requests
04/01/2017-04/1	I/2017 Jones, William	Randy March	M:0800 - 1400	W:0800 - 1400 PC	А, НМК	Bergen		Guildnet		762 Flower Lane, Lawrenceville	e, 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
Date	The Master Week date range.
Patient	Patient Name. Click hyperlink to access a summary popup and to navigate to the
Coordinator	Patient Coordinator
Coordinator	
Visit	Scheduled Master Week Visits. Hovering over the details provides a quick-glance
	view (such as Pay Code, POC, Primary Bill To and Service Code).
Discipline	Disciplines based on the Service Code scheduled on all Master Week shifts.
Primary Payer	Primary Payer for the visit.
Contract	Primary Contract for the visit.
Address	Patient's Address. Click hyperlink to open the popup and navigate to Google Maps
Addiess	for this location.



Column	Description
Phone	Patient's Home Phone. Click on the hyperlink to show additional phone numbers for the Patient to include Emergency Contact.
Requests	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.
Status	<ul> <li>Indicates the Status of the Open Master Week:</li> <li>Requested: At least one Caregiver has requested the shift.</li> <li>No Requests: 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 Mas	ter Weeks: 3	Total I	Master Week	Requests: 2									Page 1 of 3	30 Next Last
Date	Patient	Coordinator	Visit		Discipline		Primary Paye	n in the second s	Contract		Address		Phone		Status
04/01/2017-04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400	W:0800 - 1400	нна, нѕк, нм	ĸ	Bergen		Senior He	alth Partners	123 Fake Street, Trenton, NJ, 1	.1215	<u>555-555-55555</u>	<u>Requests</u>	Requested
	Caregiver			Requested		Emplo	oyment Type	Master W	eek Hours	Address		Phone		Assign	Reject
	Smith, Jane (	10034)		1/19/2016 10	0:23	HHA,	, НЅК, НМК	32:00		55-22 3rd Ave	enue, Princeton, NJ, 11215	123-456-7890	Preferences	ASSIGN	REJECT
	Andrews, Tir	na (1002)		1/19/2016 14	:15	HHA,	, нѕк, нмк	00:00		112 Richard L	ane, Hamilton, NJ, 11381	242-292-2215	Preferences	ASSIGN	REJECT
04/01/2017-04/11/2017	Allen, Kenneth	Sandra Jones	M:0800 - 1400	<b>W</b> : <u>0800 - 1400</u>	нна		Manhattan	Partners	Senior He	ealth Partners	123 Fake Street, Trenton, NJ, 1	1215	555-555-5555	Requests	No Requests
04/01/2017-04/11/2017	Jones, William	Randy March	M:0800 - 1400	W:0800 - 1400	РСА, НМК		Bergen		Guildnet		762 Flower Lane, Lawrencevil	le, 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 **ASSIGN**, 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 **REJECT**, 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").

#### **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)



# **Patient Phone Number Descriptions**

Patient phone number descriptions corresponding to the descriptions entered in the Phone 2 and

**Phone 3** fields in the Patient Profile in the HHAX system are seen on the Mobile app (as illustrated in the top image). The second image illustrates the labels as seen in the Mobile app.

Address	Add
Address Line 1         Address Line 2         City         State         County         * Zip         Cross Street         Primary         Address Ty           L123 Main Street         MIAMI         FL         Miami-dade         33130         -	pe(s) Notes
Phone Number Information	
Home Phone: 888 - 777 - 6666	
Phone 2: 555 - 666 - 2222 - Description: Doctor's Office	
Phone 3: [333] - [444] - [7777]	
Direction:	
Alternate Billing Address: 🗋	

**Patient Profile: Address Section** 

	atient Detai John Smith	il									
	Patient Info	Visits									
Excellence (	John Smith QA - ML (Excellen	ice QA Team)									
Phone 1	425-345-2353										
Phone 2	349-503-5234	(Doctor's Off)									
Phone 3	561-303-2200	(Cell Phone)									
Address 1	100 1st street, E 160017987	BUTLER, PA,									
Emergency Conta	acts										
This pation emergency please	This patient has not provided any emergency contact. if this is an error please contact your agency.										

**Phone Number Description Labels** 



# **Mobile App Offline Mode**

This feature allows Caregivers to use the Mobile App when there is no internet connectivity; later to synchronize when connectivity is restored.

To manage the feature, navigate to *Admin > Office Setup > Search Office*. In the *Mobile* section, select the **Enable Mobile App Offline Mode** checkbox to enable the function for the selected Office. To set the sync period, specify the number of hours in the **Mobile Offline Sync Period** field to accept the sync period (range between 24-120 hours).



Mobile App Offline Mode Settings

Note: By default, the Enable Mobile App Offline Mode field is unselected. The default sync period is set to 24 hours.

The **Mobile Offline Sync Period** is used to determine how much Patient and visit data is transferred to the mobile device when the Caregiver logs in when online.

- If the Office is servicing an area with relatively stable Internet via Wi-fi or cell, then a lower sync period is recommended.
- If the Office is located in a rural area with unstable Internet, then a higher sync period is recommended.

For example, if the **Mobile Offline Sync Period** is set to **48** hours, then two full days of visit data are transferred to the Caregiver's device every time they log in when online. If they go offline immediately after, then they can perform visits for 2 full days before having to go back online again for additional visits.



With this feature enabled at the Office level, Caregivers can Clock IN/OUT successfully while offline. Once the internet connectivity is restored, the Mobile App synchronizes with the HHAX system and new and modified visit information is exchanged between the HHAeXchange System and the Caregiver Mobile App according to the sync period.

## **Caregiver Mobile App**

Synchronization occurs for the Caregiver on the Mobile App when any of the following actions take place online:

- Logging In
- Switching Agencies
- Changing Languages

During synchronization, the Mobile App downloads the next visits for the synchronization period as defined by the Agency at the Office Level. This value can range from 24 hours to 120 hours with 24 hours as the default.

The only indicator that the Caregiver has when in Offline mode is the Offline Mode Active message alert that appears at the bottom of the Home screen (as seen in the following image).



Mobile App Offline Mode Active



When in Offline Mode, the Caregiver can access Visits via the **Today's Schedule** screen and perform the following:

- Clock-IN/OUT
- Signature with Skip, and
- Enter Duties

Outside of the actions listed above, all other Mobile App functions are unavailable in Offline Mode.

Selecting any other function results in the Network Notice screen (as seen in the image below).



Mobile App Network Notice

Functionality NOT Supported in Offline Mode:

- My Availability
- Open shift
- Messages
- Patients
- Sign up
- Forgot Password

- Change Password
- Change Language
- Change Agencies
- Notes
- Care Insights
- Caregiver Time Edit Request



### **Caveats**

Note the following caveats regarding the behavior of the Mobile App while in Offline Mode:

- 1. When online, visits created on the same day by the Agency are almost immediately available to the Mobile App when the Caregiver goes to **Today's Schedule**. In Offline Mode, this behavior changes and new and modified visit data is not available until synchronization occurs (i.e., when the user *logs in, switches agencies, switches languages* or clicks on *Unscheduled Visit, Visits* or *Patients*).
- 2. If the Caregiver is in **Today's Schedule** when online and then goes offline, then the Caregiver is redirected back to the home page where the **Offline Mode Active** message appears. Note that once offline, the Caregiver may start a visit which is then altered by the Agency. In this case, any reconciliation of that visit must be performed manually by the Agency after the Caregiver goes back online and synchronization takes place.
- 3. When offline, the Confirmed Time of a completed visit is calculated using the device's local time and reconciled with the HHAeXchange Enterprise system once Internet connectivity is restored.
- 4. When an Agency has the **Enable Offline Mode** selected, if the Caregiver performs a Clock In through an **Unscheduled Visit**, then the Clock Out must be performed using **Today's Schedule**.

**Note:** To prevent disruption to the Caregiver synchronization process, it is recommended that Mobile Offline Support for your Office be enabled outside of regular business hours.

### **Offline Authentication**

Because credentials cannot be authenticated with the HHAeXchange system when offline, the Mobile app securely stores the last known credentials on the mobile device for the Caregiver to log in when in Offline Mode. The user is allowed up to 3 attempts to login before they are prompted to wait 3 minutes to retry.



# **Mobile User Management**

The **Mobile User Management** function (*Admin > Mobile User Management*) facilitates the search and management of Mobile App Users. This function allows users to update Mobile User information to include password reset without having to contact HHAX Support.

**Note:** Applying updates via this function does not affect any fields in the HHAX Caregiver Profile.

The *Mobile User Management* page is comprised of two sections: **Search** and **Search Results**, as illustrated in the following image. On the Search Results, each record contains Mobile User information (such as the *Office Name, Caregiver Name, Mobile ID, Email Address*, and *SSN*). The right-most columns include an <u>Edit</u> (link) to update Mobile User information and <u>Reset</u> to reset the user's password.

Mobile User Managemen	t											
Caregiver Mobile ID:					Office Nam	e:	Last	Last 4 SSN:				
Caregiver Email ID:					First Nam	e:		Last	Name:			
						Search						
Search Results (4)												
Office Name	Caregiver Name	Sex	DOB	Phone Number	Last 4 SSN	Email Address	Mobile ID	<u>Status</u>	Last Sign In Date	Edit	Password	
Excellence QA Team	krish, krushna New	м	05/16/2007	545-445-6644	1234	krushna@excellenceinfonet.com	1044256	Inactive	07/02/2018 08:08 AM	Edit	Reset	
HHAeXchange Office	krish, krushna New	M	05/16/2007	545-445-6644	1234	krushna@excellenceinfonet.com	1044256	Inactive	07/02/2018 08:08 AM	Edit	Reset	
HHAeXchange Office	Akhtar, Shoaib	M	08/10/2017	686-883-3868	6468	tejasp.excellence103@live.com	1095002	Inactive	08/27/2019 03:03 AM	Edit	Reset	
PCA Exchange Office	Jensen, David	М	01/01/1970	868-664-3572	7546	tejasp.excellence104@live.com	1095003	Inactive	05/11/2018 03:03 AM	Edit	Reset	

#### **Mobile User Management**

A Mobile User must have an *Active* **Status** for the <u>Edit</u> and <u>Reset</u> links to be available. In addition, a user must have permissions enabled for **Edit Mobile User Profile** and **Reset Mobile Passwords**. Refer to the <u>Permissions</u> section below for further details.

Upon clicking on <u>Reset</u>, an email or text message is sent to the mobile user prompting for a Password Reset.

Editing information in a Mobile User Profile is permission-based. In addition, Caregivers linked to multiple Agencies cannot be edited in the system, as illustrated in the image below. In this case, contact the HHAX Support Team for further assistance.



tobile User Management Caregiver Mobile ID: Caregiver Email ID:				Office Name: First Name: Search				Last 4 SSN:			
Search Results (4)											
Office Name	Caregiver Name	Sex	DOB	Phone Number	Last 4 SSN	Email Address	Mobile ID	Status	Last Sign In Date	Edit	Password
Excellence OA Team	krish, krushna New1	M	05/16/2007	545-445-6644	1234	krushna@excellenceinfonet.com	1044256	Active	07/02/2018 08:08 AM	Edit	Reset
Excellence QA Team	krish, krushna New1	м	05/16/2007	545-445-6644	1234	krushna@excellenceinfonet.com	1044256	Active	07/02/2018 08:08 AM	Edit	Reset
HHAeXchange Office	Akhtar, Shoaib	М	08/10/2017	686-883-3868	6468	tejasp.excellence103@live.com	1095002	Inactive	08/27/2019 03:03 AM	Edit	Reset
PCA Exchange Office	Jensen, David NN	м	01/01/1970	868-664-3572	7546	tejasp.excellence104@live.com	1095003	Inactive	05/11/2018 03:03 AM	Edit	Reset
				HHAeXchang You can not agencies. Pl	e - Validation edit this profi ease contact i	n(s) ile as the Caregiver is linked to m HHAexchange Support for assista ок	ultiple nce.	ß			

Mobile User Management: Edit Validation

DISCLAIMER
Editing Mobile User Information via the Mobile User Management function <i>inactivates</i> the User's
Mobile/Portal ID (in the Mobile App). The <b>Mobile/Portal ID</b> must be changed to Active thereafter in
the Caregiver Profile page.

### **Mobile User Management - History**

When editing a Caregiver's information via the Mobile User Management function, a <u>History</u> link is available on the *Edit Caregiver Profile Information* window (as seen in the following image) to view a history of any Mobile User Management function for the Caregiver.



Edit Caregiver Profile Information Window – History Link

When clicking on the <u>History</u> link, the system prompts for a **Field Name** as well as a **From/To Date** range (as seen in the image below). Based on the selected **Field Name**, the Search Results show a Caregiver Mobile Management change log providing information such as the User who made the edit, the date, the Caregiver Name and the old and new values.



View History	- Mobile User Management - Enterprise
Field Name:	DOB         From Date:         10/15/2019         To Date:         10/18/2019
	Search
	Mobile User Management: View History

#### **Permissions for Mobile User Management**

Role permissions must be enabled for users for this function. To grant permission to a role, navigate to *Admin > User Management > Edit Roles*.

Select *Admin* from the **Section** field dropdown and the applicable role(s) from the **Roles** dropdown. Scroll to Mobile User Management and select *Mobile User Management* for the respective role(s).

- Select *Edit Mobile User Profiles* to allow a role to view and edit profiles.
- Select *Reset Mobile Password* to allow the role to reset a Mobile User's passwords.

dit Roles		
* Section: Admin	<b>~</b> ]	
Menu	Admin	
Admin	✓ <u>H</u>	
HolidayDelete		
HolidayEdit	<b>&gt;</b>	
HolidayNew	<b>V</b>	
Manage Report Subscription	<b>&gt;</b>	
Calculate New Mileage Expenses	✓	
Mileage Calculations	$\checkmark$	
Import Files		
File Monitoring Dashboard	$\checkmark$	
Mobile User Management	<u>.</u> н	
Edit Mobile User Profiles	<b>V</b>	
Reset Mobile Password	<b>V</b>	
Uner Monagement		

**Mobile User Management Permission** 



# **Mobile App Password Reset**

### **Forgot Password?**

A Caregiver can reset their own password directly from the Login screen as shown in the sequence below, from top to bottom.

Click on the Forgot Password? link.



**Forgot Password Link** 

Enter the **Email** or **Phone Number** associated with the account; where a temporary password is sent. Click **Reset Password**.

Cancel Forgot Password
Enter Email Address or Phone Number
If providing a Phone Number just enter the digits.
Number,
Reset Password
~~~~~~~

**Enter Email/Phone Number** 



The app prompts the Caregiver to enter the Current Password (enter the temporary password

received), a New Password, and Re-Enter New Password (to confirm). Click Confirm to log in to the app.

Password Requirements:	ſ
- At least 1 capital letter - At least 1 number	
Current Password	
New Password	
ne-chief New Password	
Confirm	

**Password Change Fields** 

Note: A Caregiver can request a password reset via the Forgot Password? link whether linked to an Agency or not.

#### **Account Locked**

The Mobile App issues a temporary password (via the last used delivery method, such as text or email) if a Caregiver is locked out after 3 failed login attempts (as seen in the image below).

Real Time Web-Based Management Solutions for Home Care Agencies & Payers
anjan223@ex.com
Password
Forgot Password?
Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency.
ок
Account has been locked and a new temp Password was sent to you. For additional assistance please contact your Agency.

Account Locked



# **Mobile App Caregiver Time Edit Corrections**

The HHAX Mobile App currently captures real-time Caregiver EVV via FOB, GPS, and Beacon methods. If EVV confirmations are missed, or do not accurately reflect the Start/End times of services, then Agencies can allow Caregivers to submit a request using the Mobile App to update Start and/or End times for service.

In the request, the Caregiver must provide the reason for their manual time correction, with any additional notes. A Patient signature is also captured at the time of the correction. These requests are received in the system where an authorized Office User approves or rejects the request.

- If *approved*, then the visit is updated with the requested times and the visit reason and the new Confirmed Time is approved.
- If <u>rejected</u>, then the Caregiver receives a note on the Mobile App, and the Confirmed Time remains unchanged.

Refer to the <u>Caregiver Time Edit Request Job Aid</u> for details and instructions on the Mobile App.

## **Office Level Configuration**

To allow Caregivers to request Mobile App EVV Time Edits, navigate to the *Edit Office* page (*Admin > Office Setup*). Under the *Mobile* section, select the **Allow Caregivers to Modify Confirmed Time via** Mobile App and/or Allow Caregivers to enter Time via the Mobile App when there is no preexisting EVV, as seen in the image below and described in the table underneath.



Edit Office: Caregiver Time Edit Correction Options

Note: These are not default settings; Agencies must enable accordingly.



If selected	Then
Allow Caregivers to Modify	All Caregivers* in that Office are presented with an edit icon next
Confirmed Time via the Mobile	to the Confirmed Time. This option is used to correct the time of
Арр	a Clock-In and/or Clock-Out.
Allow Caregivers to Enter Time	All Caregivers* in that Office are presented with an edit icon next
via the Mobile App when there	to the blank confirmed time (:). This option would be selected
is no Preexisting EVV	when the Caregiver forgot to Clock-In and/or Clock-Out.

**\*Note:** The Office Level setting for **Caregiver Time Edit** can be overridden by enabling this feature per Caregiver. If disabled at the Office Level, specific Caregivers can be enabled and if enabled at the Office Level specific Caregivers can be disabled.

### **Caregiver Level Configuration**

If this function has been enabled at an Office level, then they are automatically checked at the Caregiver level. To override Office level settings, go to the Caregiver *Availability* page (*Caregiver > Availability*) and select **Caregiver Time Modification Agency Office Level Override** checkbox at the Caregiver Time Corrections settings.

If this feature is not enabled at the Office level, then select the desired **Caregiver Time Correction** options, as seen in the following image and described in the table underneath.

Caregiver Info Active			
Name: Team: Address: &	Caregiver Code: Vendor: Languages:	Office: Phone: DOB:	Caregiver Hours: H: 0 () V: 0
Caregiver Mobile App/Portal Settings			History
Open Case Acceptance: ⊮ <sub>View Open</sub> ⊮ Request a	I Cases () Ind Accept Open Cases () Alternative Correction: Caregiver Time Correction: Caregiver Care Correction: Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative Alternative	jiver Time Modification Agency Office Leve low Caregiver to modify Confirmed Time vi low Caregiver to enter Time via the mobile	l Override () a the mobile app () app when there is no preexisting EVV ()
Request Limit: 🔲 🤢			
Set Availability via Mobile App: 🗹 🚺			
Permanent Week Availability			bbA
Monday Tuesday W	ednesday Thursday Friday	Saturday	Sunday
0800-2000 Live-In 0800-2000 Live-In 08	800-2000 Live-In 0800-2000 Live-In 0800-2	000 Live-In 0800-2000 Live-In	0800-2000 Live-In <u>Edit</u>

Caregiver Availability Page: Caregiver Time Edit Correction Options



If selected	Then
Caregiver Time Modification	Must be checked to enable the additional options. Selecting this
Agency Office Level Override	box overrides the Office Level settings for this Caregiver.
Allow Caregiver to Modify	this Caregiver is presented with an edit icon next to the Confirmed
Time via the Mobile App	Time on their Mobile App.
Allow Caregiver to Enter Time	this Caregiver is presented with an edit icon next to the blank
via the Mobile App when	confirmed time (:).This option would be selected when the
there is no Preexisting EVV	Caregiver forgot to Clock-In and/or Clock-Out.

**\*Note:** The Office Level setting for **Caregiver Time Edit** can be overridden by enabling this feature per Caregiver. If disabled at the Office Level, specific Caregivers can be enabled and if enabled at the Office Level specific Caregivers can be disabled.

### **Call Dashboard Corrections Tab**

To track Caregiver Time Edit Requests navigate to the **Corrections** page on the *Call Dashboard* (*Visit* > *Call Dashboard*). Once a Caregiver submits a Correction, these requests are routed to the *Call Dashboard Corrections* page, comprised of two sections: **Search** and **Results**, as seen in the following image.

orrections															
Office(s):	All	~	Patient:					Caregiver:				Coordinator:	All		v
Contracts:	All v Pi		Patient Team:	All	All		~	Patient Location:	All 🗸		~	Patient Branch:	All		`
Reason:	All	~	Caregiver Team:	All			~	Caregiver Location:	All		~	Caregiver Branch:	All		,
From Date:		<b>#</b>	To Date:			<b>#</b>									
arch Results: Care	giver Time Edits Corr	ections Request	ts (48)				Search							Page 1 of 5	Next
arch Results: Care	giver Time Edits Corro	ections Request	ts (48)	)	6	6	Search		8		10	0	<u>Co</u>	Page 1 of 5	Next
arch Results: Care dmission ID	egiver Time Edits Corro 2 Caregiver Name	ections Request	ts (48) ame <u>Schedule</u>	Date▼	5 In/Out	6 Original time	Corrected time		8 Reason	9 Notes	10 Sig.	Requeste	<u>Co</u> :d	Page 1 of 5	<u>Next</u>
arch Results: Care dmission ID 020598537412	giver Time Edits Corro Caregiver Name David Jensen	ections Request 3 Patient N Bharadwaj J	ts (48) ame <u>Schedule</u> <u>Mukul</u> 08/29/	0 d Date ▼ 2019	5 In/Out In	6 Original time 07:17	Corrected time 14:06	Tes	8 Reason ting reason	9 Notes	10 Sig.	11 Requeste 08/29/2019 07:1	<u>Co</u> ed 17:42 AM	Page 1 of 5 prrections Requi	<u>Next</u> ests Hi 2
arch Results: Can dmission ID 020598537412 020598537412	2 Carcgiver Name Ravid Jensen Ravid Jensen	ections Reques: 3 Patient N Bharadwaj J Bharadwaj J	ts (48) ame Schedule Mukul 08/29/ Mukul 08/29/	d Date ▼ 2019 2019	5 In/Out In Out	6 Original time 07:17 07:17	Corrected time 14:06 14:48	Tes	8 Reason ting reason ocked Late	<mark>ඉ</mark> Notes ජ ජ	10 Sig. ජ	08/29/2019 07:1 08/29/2019 07:1	<u>Co</u> ed 17:42 AM .8:47 AM	Page 1 of 5 prrections Requ Approve Approve	Next ests Hi 2 Re
arch Results: Carr dmission ID 020598537412 020598537412 020598537412	egiver Time Edits Corr Caregiver Name David Jensen David Jensen David Jensen	ections Reques Patient N Bharadwaj J Bharadwaj J	ts (48) ame Schedule Mukul 08/29, Mukul 08/29,	2019 2019 2019	5 In/Out In Out In	6 Original time 07:17 07:17 07:25	Corrected time           14:06           14:48           20:30	Tes	Reason ting reason scked Late cked Early	9 Notes E E E	10 Sig. ජ ජ	Requeste           08/29/2019 07:1           08/29/2019 07:2           08/29/2019 07:2	<u>Co</u> ed 17:42 AM 18:47 AM 15:41 AM	Page 1 of 5 prrections Requ Approve Approve Approve	Re Re
1020598537412 1020598537412 1020598537412	egiver Time Edits Corr 2 Careoiver Name David Jensen David Jensen David Jensen David Jensen	ections Reques Patient N Bharadwaj J Bharadwaj J Bharadwaj J Bharadwaj J	ts (48) ame Schedule Mukai 08/29/ Mukai 08/29/ Mukai 08/29/ Mukai 08/29/	2019 2019 2019 2019 2019	5 In/Out In Out In	07:17 07:17 07:25 05:52	Corrected time 14:06 14:48 20:30 05:15	Tes Clo Clo	8 Reason ting reason ocked Late icked Early Other	9 Notes E E E E E	10 sig. ය ය ය	08/29/2019 07:1 08/29/2019 07:1 08/29/2019 07:2 08/29/2019 08:0	Co ed 17:42 AM 18:47 AM 16:08 AM	Page 1 of 5 prrections Required Approve Approve Approve Approve	Re Re Re Re

Call Dashboard Corrections Page



**Note:** Role permissions must be enabled for users to view and edit information on this page. Refer to the <u>Permissions</u> section for details.

The Results section provides visit information per record as described in the following table.

Column	Description
1 Admission ID	Patient Admission ID
2 Caregiver Name	Caregiver requesting correction. Click on the Caregiver Name to route
	to the Caregiver Calendar.
3 Patient Name	Click on the Patient Name to route to the Patient Calendar.
4 Scheduled Date	The Visit Scheduled Date
5 In/Out	Indicates whether the request is for an In or Out confirmation.
6 Original Time	The original Confirmed Time for the visit.
7 Corrected Time	The Corrected Time submitted by the Caregiver
8 Reason	The correction reason captured in the Mobile App (managed via
	Reference Table Management)
9 Notes	If Notes are added, then an icon displays. Hover over the icon to see
5 110105	partial note or click on the icon to view the entire Note.
10 Sig	Hover over or click on the icon to see the read-only Patient Signature
	captured at the time of requested correction.
11 Requested	The Date and Time the Caregiver submitted the request.
	Approve (green) and Reject (red) buttons.
	• Select the <i>Approve</i> button to approve the request (if validation
	passes). Upon confirmation, the visit is updated with the Caregiver
	requested times and the visit reason and the record is removed
12	from the results and logged in History.
Approva/ Pajact	• Select the <i>Reject</i> button to reject the request. The <i>Caregiver Time</i>
	Edit Correction Requests window opens to make additional
	comments. Click <i>Save</i> to reject the request and remove from the
	grid.
	If <u>rejected</u> , then the Caregiver receives a message on the Mobile App,
	and the Confirmed Time remains unchanged.



#### Schedule Time Column Added to Time Correction Dashboard

A **Schedule Time** column has been added to the Time Correction Dashboard grid (*Call Dashboard > Corrections*) to easily identify which visit the corrected call/request applies to (as seen in the following image).

Dashboard (Correction	ons)	Cal Hanter	ance Hissed I	n Hir	2 sed Out	Massed Call	Visit Los Call	a Bejected Calls	C	Generations				
orrections														
Office(s):	All .	v	Patient				Caregive	1			Coordinator:	All		
Contracts:	All	×	Patient Team:	All			v Patient Locatio	a All		v	Patient Branch:	All		
Reason:	All	v )	Caregiver Team:	All			v Caregiver Locatio	a All		×	Caregiver Branch:	All		
From Date:	09/02/2020	8	To Date:	11/11/2020										
irch Results: Caregiver	r Time Edit Correction Re	quests (6)												Page
arch Results: Caregiver Admission ID	r Time Edit Correction Rec Careuiver Name	uests (6) Patient Name	Scheduled Date ¥	Scheduled	în/Out	Original time	Corrected time	Reason	Notes	Sig.	Requested	1	Corrections	Page Requests II
Admission ID e000205985306188	r Time Edit Correction Res Carsuiver Name keid	puests (6) Patient Name	Schulaind Date ¥ 11/05/2020	Scheduled Time	In/Out Out	Original time	Corrected time 01:15	Reason Graphia Lost conection	Notes	Sig.	Requested 11/05/2020 06:39	:14 AM	Corrections	Page Requests H
Admission ID 9000205985386188 9100205	r Time Edit Correction Res Catstuiyer Name k.nd exc255.acian	Patient Name 1073 OA Society abiaxe astient	Scheduled Date ¥ 11/05/2020 10/07/2020	Scheduled Time 0100-0115 1502-1515	In/Out Out In	Original time.	Corrected time 01:15 02:00	Reason Irushna Lost conection Irushna Lost conection	Notes Cf	Sig. C	Requested 11/05/2020 06:39 10/07/2020 05:23	:14 AM	Corrections Approve Approve	Page Requests H Reg Reg
Admission ID 9000205985386188 9100205	r Time Edit Correction Res Carsulver Name k.nd ansB88.atian ass888.atian	Patient Name 1073 SA Sandees shi.org.calient shi.org.calient	Scheduled Date ¥ 11/05/2026 10/07/2020 10/07/2020	Scheduled Time 0100-0115 1500-1515	In/Out Out In Out	Original time. ( 01:30 02:45	Corrected time 01:15 02:00 02:15	Reason Inshra Lost conction Inshra Lost conction Inshra Lost conction	Notes d d d	Sig. C C C	Requested 11/05/2020-06:39 10/07/2020-06:21 10/07/2020-05:21	1 :14 AM :21 AM :36 AM	Approve Approve	Page Requests II Reju Reju
Administration ID econocossessates 9100205 556677	r Time Edit Correction Res Carsuiver. Name k.o.d exettibileian assibil.anim carsibil.anim cars.cars	Patient Name 1972 AL Santers abi.nor. satient abi.nor. satient abi.nor. satient abi.nor. satient	Scheduled. Date ¥ 11/05/2020 10/07/2020 10/07/2020 30/05/2020	Scheduled Time 0100-0115 1590-1515 1590-1515 0000-0015	In/Out Out In Out In	Original time.  01:30 02:45 	Corrected time 01:15 02:00 02:15 00:01	Reation Drushne Lost conection Insulina Lost conection Glocked Early	Notes E E E E	siq. d d d d	Requested 11/05/2020 06:59 10/07/2020 06:21 10/07/2020 06:21 10/05/2020 11:159	:14 AM :21 AM :36 AM	Corrections Approve Approve Approve Approve	Page Requests H Rej Rej Rej
Admission ID 900205983386188 9102205 9102205 356677 356677	Time Edit Correction Rev Earsuiver. Name Australia Australia Cart. Cart Cart. Cart Cart. Cart	poets (6) Patient Name 1973, 0A Soutee etii anu auteet etii anu auteet 2D Seaso sund 2D Seaso sund	Scheduled, Data V 31/05/2020 30/07/2020 30/07/2020 30/05/2020 30/05/2020	Scheduled Time 2100-0115 2300-1515 5000-0015 5000-0015	In/Qut Out In Out Out	Original time.  D1:30 02:45  	Corrected time 01115 02;00 02:15 00:01 00:16	Reason Drushne Lost conection Drushne Lost conection Drushna Lost conection Clocked Early Porgot	Notes d d d d d d d	Siq. 3 3 3 4 3 4 3 3 3 3 3 3 3 3 3 3 3 3 3	Requested 11/05/2020 06:59 10/07/2020 06:21 10/05/2020 06:21 10/05/2020 11:59 10/05/2020 12:00	:14 AM :21 AM :36 AM :33 PM :55 AM	Corrections           Approve           Approve           Approve           Approve           Approve           Approve           Approve           Approve           Approve	Page Requests II Rejo Rejo Rejo Rejo

Call Dashboard Corrections: Added Scheduled Time Column

Click on the **<u>Scheduled Time</u>** link to open the *Visit Info* window, as seen in the following image.

Corrections				Manuf	Figling yes	24.					Uros indata
Officer(a)			Dettert	NON	Runeu vis	Admission ID	P. EVO. 556677		Patient I	Vama: 03 Pass	user update
omce(s).	All	v	Patient:	- I		round soon 10	a conformation		r blocht i	differ of rees	agrica
Contracts:	All		Patient Team:			Visit Date	: 10/05/2020		Patient Pho	ne #:	
				-		Assignment ID	003220		Coordin	ators: RANE W	ALKER
Reason:	All	v	Caregiver Team:	A	Schedule	V	isit Info 📔 Bill In	io l			
From Date:	09/02/2020		To Date:	11 Schedu	le						Histo
						• Schedule Time:	0000 - 0015	c	aregiver Code: E	XQ-3220 ire care	2
						POC:	Select	¥ A	ssignment ID: 0	3220	
Search Results: Caregiver	r Time Edit Correction Re	equests (6)							* Pay Code:	IHA BASE	~
						* Service Code:	8Ashwin	~			
							&Ashwin	ii			
Admission ID	Caragiver Name	Patient Name	Scheduled Date *	1		Bill Type:	1_HHA_1146 1_HHA1687_JH1 123456		nclude in Mileag	ei 🗋 🛈	
9000205905306100	<u>k sid</u>	1873 QA Sandeep	11/05/2020	1			A_HHA_POC_Compliance A1_HHA_Hour Daily1	ve Close			
9100205	awa888 anian	phi one patient	10/07/2020				HCSS_Mutual_H HH_HHA_26-Jul-18				
9100205	aws988 anian	ohi one patient	10/07/2020				HHA HRAAIN HHA SCC1				
556677	CHCH.CACH	03 Reessioned	10/05/2020	0000-0015	In	;	HHA SCC2 HHA SSP Daily_Mut	Clocked Early	đ	đ	10/05/2020 11:59:33 P
556677	care care	03 Reassioned	10/05/2020	0000-0015	Out		HHA SSP_D HHA-TTAL Code	Forgot	đ	đ	10/06/2020 12:00:55 A

Access Visit Info Window



### **Corrections Request History**

Click on the <u>Corrections Request History</u> link, located on the top-right corner of the Results grid, to display a history of *Approved* and *Rejected* Caregiver Time Corrections (as illustrated in the image below).

1		0			3			2		11	Corre	ctions	Request	s Hi
Correction									-	-				
(	HHAeXchange	- Corrections R	tequests Histor	y				×.	-				×	] ~
d								-				Page 1	of 2   Next Last	
1	Admission ID	Caregiver Name	Patient Name	Scheduled Date 7	In/Out	Original	Corrected	Reason	Notes	Sig.	Requested	Status	Actioned By	
Fr	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	Out	06:54	18:53	Forgot	đ	đ	08/27/2019 06:55:35 AM	Approved	vikas QA (nsmultiga2)	1
	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	In	03:23	17:30	Clocked Late	đ	đ	08/27/2019 06:59:12 AM	Approved	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	In	04:02	05:32		đ	đ	08/27/2019 02:07:19 AM	Rejected	vikas QA (nsmultiga2)	
Search I	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	Out	13:35	07:36		đ	đ	08/27/2019 02:10:34 AM	Rejected	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	In	02:11	06:15	Clocked Early	đ	đ	08/27/2019 02:14:04 AM	Rejected	vikas QA (nsmultiga2)	Histo
Admiss	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	Out	02:12	06:30	Clocked Early	đ	đ	08/27/2019 02:19:04 AM	Rejected	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	In	06:44	20:30	Clocked Late	đ	đ	08/27/2019 06:46:47 AM	Rejected	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/27/2019	Out	06:48	20:45	Clocked Early	đ	đ	08/27/2019 06:49:27 AM	Rejected	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/26/2019	In	09:35	06:16	HHAeXchange	đ	đ	08/26/2019 09:48:32 AM	Rejected	vikas QA (nsmultiga2)	
	900020598537412	David Jensen	Bharadwai Mukul	08/26/2019	10	09:47	05:15	Testing reason	a	a	08/26/2019 09:52:12 AM	Rejected	vikas QA	

**Corrections Requests History** 

#### Permissions for Call Dashboard Corrections

Role permissions must be enabled for users to view and edit information on this page. To grant permission to a role, navigate to *Admin > User Management > Edit Roles*. Select *Visit* from the **Section** field dropdown and the applicable role(s) from the **Roles** dropdown. Scroll to Call Dashboard and select *Call Dashboard Corrections* for the respective role(s).

Edit Roles	
* Section: Visi	it 🔍
Menu	Admin
Visit	<b>⊻</b> <u>⊢</u>
EditCallAudit	
EditDutySheet	· · · · · · · · · · · · · · · · · · ·
L DL AdL Ana, AUL	
Include Visit In Mileage Calculation	
Mileage Expense Manual Override	
Call Dashboard	<b>⊠</b> <u>⊢</u>
Call Dashboard Conexus Message	Y
sut, inex aCa, ain, and	
SwitchIVRCallType	V
Reverse Call Rejection	
Call Dashboard Corrections	

#### **Call Dashboard Corrections Permission**



#### **Reference Table Management: Caregiver Time Edit Reasons**

The *Caregiver Time Edit Reasons* are created and managed via the Reference Table Management function (*Admin > Reference Table Management*). Select *Caregiver Time Edit Reasons* from the **Reference Table** field to access. Click the *Add* button to add a reason.

erence Table Mar	nagement		Enterprise 18.4.1.0 TELXDEVD01 : 443 (Chromd) chrome 76 (Doc Chro 8/30 04
Search			
Reference Table:	Caregiver Time Edit Reasons	Search	Legend
Search Results			add
Reason ID	Reason	Reason Description	Status
Reason ID 127205	Reason Clocked Early	Reason Description Accidentally Clocked early	<u>Status</u> Active
Reason ID 127205 127206	Reason Clocked Early Clocked Late	Reason Description Accidentally Clocked early Accidentally Clocked late	Status Active Active
Reason ID 127205 127206 127207	Reason Clocked Early Clocked Late Forgot	Reason Description Accidentally Clocked early Accidentally Clocked late Accidentally forgot to Clock	<u>Status</u> Active Active Active Active
Reason ID 127205 127206 127207 127223	Reason Clocked Early Clocked Late Forgot HHAeXchange	Reason Description Accidentally Clocked early Accidentally Clocked late Accidentally forgot to Clock HHaExchange Descripion	Status Active Active Active Active Active

**Reference Table: Caregiver Time Edit Reasons** 

Click the **Add** button to add a Caregiver Time Edit Reason. To edit, click on the <u>Reason</u> name (link). The *Time Correction Reason* window opens. Enter the required **Reason** field and enter a **Reason Description** (optional). Click **Save**.

Time Correction Reas	on
* Reason:	Clocked Early
Reason Description:	Accidentally Clocked early
Status:	Active 🔻
	Save Cancel

Add/Edit Time Correction Reason

### **Caregiver Time Edit Validations**

#### **Billed Visit Validation**

A Caregiver Time Edit request cannot be processed or approved once a visit has been billed. When attempting to approve a request that has been billed, the system generates an error validation, as seen in the following image. In this case, click the Reject button to remove the request from the grid.



Call Dashboard (Co	rrections)	Call Main	tenance <u>Missed</u>	In I	2 Nissed Out	2 Missed Call	2 Visit Log	2 Call Log	Reje	2 cted Calls
Corrections					ннлех	change-Vali	idation(s)	1	×	
Office(s):	All	v	Patient:		Visit has	been billed.				
Contracts:	All	×	Patient Team:	All			ок			
Reason:	All	~	Caregiver Team:	All	<u></u>	~	Ca	regiver	All	

**Visit Billed Validation** 

#### **Corrections Page "Approve/Reject" (Approval>Validation Pass)**

When a request is approved, the system automatically creates a Visit Note with *Caregiver Corrected Time Approved* as the selected **Reason** and *Schedule Adjusted* selected for **Action Taken** (as seen in the image below). The request is then removed from the Corrections page.

sit Inforn	nation					Histor
s	cheduled Time: 1000-1100					
N 1	visit Start Time: 0700 08	/12/2019	Visit	ind Time: 073	0 08/12/2019	
	Missed Visit:					
Last	3 notes:					
Sour	ce Reason	Action Taken	Note	User	Date/Time	
C	Caregiver Corrected Time Approved	Schedule Adjusted	Visit confirmed time updated via Corrections approval process. Original confirm time of 06:30 v updated to 07:30 as approved b system user.	vas nsmultiga2 y	2019-09-09 07:54:02	Print
∧└╼			V V V V V V			

**Caregiver Corrected Time (Approval) Note** 

#### **Approve/Reject (Approval>Validation Fail)**

Validation Fail: If validation fails, then the system generates a validation error with a suggested fix. Click **OK** to close the message. The request remains in the Corrections grid until the issue is resolved; by either approving or rejecting the request.

intenance	2 Missed	In I	2 Aissed Out	2 Missed Call	2 Visit Log	2 Call Log	2 Rejected Calls	Corr
			HHAe)	(change-Val	idation(s)		×	
]	Patient:		Visit Star Time.	t Time is required	before appro	val of Visit En	t l	
Patie	nt Team:	All			ок		_	
Caregiv	er Team:	All	L	v	Le	ocation:		
	To Date:							

**Caregiver Correction Request Validation** 



# Alternate EVV System Verification Configuration and Reporting

The Enable Alternate EVV Workflow field in the *Office Setup* page (*Admin > Office Setup > Edit Office*) in the *Mobile* section allows Providers to use an alternate EVV workflow to achieve state-required compliance (such as when Patient Signature and/or Patient Voice Recording is required to verify visit details). Once the Enable Alternate EVV Workflow checkbox is selected, the following options become available to select:

- the Verification Order dropdown field to select the order of verification (*Voice Recording* (default) or *Patient Signature*); and
- the **Require Timesheet if EVV linked to Visit w/o verification** checkbox to require a Timesheet from the Caregiver if a Patient does not verify the visit.



New/Edit Office: Enable Alterante EVV Workflow

**Note:** The Alternate EVV Workflow works for all conventionally scheduled Clock-Out scenarios. This feature applies to Single visits only (not to Consecutive or Linked visits). This feature is not currently supported in Offline Mode.

#### Mobile App: Alternate EVV System Verification

If the **Enable Alternate EVV Workflow** option is enabled, then the alternative EVV workflow is applied to the Mobile App. Once a Caregiver enters the necessary information, the service and time is confirmed and verified by the Patient via Voice Recording and or *Signature* (as per Agency settings).

For example, the sequence of images below illustrates the prompts of a Mobile App EVV Verification at Clock OUT (for both Voice Recording and Patient Signature).



#### **EVV Verification Process**

At either Clock In or Clock Out, the Caregiver selects the **Service** type (PCA, HHA, RN, etc.) for the visit. Click **Next** to continue.

<b>く</b> Back	Visit I Greg	Detail <sub>Baker</sub>	?+
	Clock	In/Out	Directions
12/13 at <b>11:00/</b>	M	12/13 at	11:15AM
Clock	In	СІ	ock Out
Select the Se	ervice to	be Per	formed
PCA			0
HHA			0
RN			0
Cance	I		Next

The *Client Confirmation and Verification* screen displays when performing a Clock Out for a visit with the Alternate EVV Workflow enabled. Once the related POC and/or Signature screens are saved, the app routes the Caregiver to the *Client Confirmation and Verification* screens where the Caregiver is prompted to pass their device to the Patient for further confirmation (as seen in the image below). Click *Continue* for the next screen.

<b>K</b> Back	Visit Deta Greg Bake	ail ?? (?) (+)
	Clock In/C	Out Directions
12/13 at <b>11:00A</b>	<b>1</b> 12/	13 at <b>11:15AM</b>
Clock In		Clock Out
Confirmed: 11:3	4AM 🗸	
Client Confirn	nation and	Verification
Please nass	the device	to the client to
confirm	and verif	y the visit
Skip		Continue
onip		



On the following screen, the Patient is required to confirm both the **Service Type** and **Visit Time** by selecting to <u>approve</u> ( $\checkmark$ ) or <u>reject</u> (X) in both fields. Press **Continue** to proceed.

<b>く</b> Back	Visit I Greg I	Detail Baker	?⊘+					
	Clock In/Out Directions							
12/13 at <b>11:00A</b>	м	12/13 at	11:15AM					
Clock I		СІ	ock Out					
Confirmed: 11:34AM 🗸								
Please confirm the Service you received								
HHA			✓ X					
Please confir	m the V	isit Tim	es					
11:34AM - 10	):34AM		✓ X					
***			~~~					
Skip		С	ontinue					

If the Patient rejects (selects X's), then the app navigates to the *Visit Confirmation Status* (last) screen where both the **Service** and **Visit Time** fields appear as **Unverified** (in red font) for the shift. *Note: Regardless of the response, the visit Clock Out is registered.* 

In the following example, the Patient has approved the **Service** and **Visit Time** by selecting the checkmarks ( $\checkmark$ ). The Patient can choose either one (or both) to verify the visit. Press the **Verify Visit** button to continue with the verification process.

Kerne Back Visit Greg	Detail Baker	?⊘+	
Clock In/Out Directions			
12/13 at <b>11:00AM</b>	M 12/13 at 11:15AM		
Clock In	Clock Out		
Confirmed: 11:34AM 🗸			
Visit Confirmation Status			
Service: HHA (Unverified)			
Visit Time: 11:34AM - 10:34AM (Unverified)			
Select One or Both Methods of Verification			
Voice Recording			
Patient Signature			
Verify Visit			



The app navigates to the next screen prompting for a *Voice Recording* and/or *Patient Signature* (based on the order set up in the HHAX system). The following screens illustrate an example where both methods of verification are used (*Voice Recording* followed by *Patient Signature*).

#### **Voice Verification View**

From the *Voice Note* screen, follow the prompts to begin recording verification. The app displays a counter to show how much time is left to record. The app prompts to stop recording.



To review the recorded message (verification), tap on the play icon. Press *Save* to continue.



#### **Patient Signature Verification View**

Once the Voice Recording is saved, the Patient Signature screen appears for the Patient to verify via signature. Once complete, press the *Save* button to continue.



	Patient Signature	
ail		
it Det		
Vis		
	x	
	Greg Baker	10:36 AM 12/13/2021
		Skip Clear Save

**Note:** In either case, the Patient can press **Skip** which marks the visit as **Unverified**. If a Patient Signature is skipped, the app prompts for a Reason.

Once the visit is confirmed by the Patient (as per the EVV Workflow), the **Service** and **Visit Time** display as **(Verified)** in green text. A message on the screen also indicates of a successful Clock Out.

Kack Visit Detail ?			
Clock In/Out Directions			
12/13 at 11:00AM 12/13 at 11:15AM			
Confirmed: 11:34AM 🗸 Confirmed: 11:37AM 🗸			
Visit Verification Status			
Service: HHA (Verified)			
Visit Time: 11:34AM - 10:37AM (Verified)			
You have been successfully Clocked Out.			
ОК			

Note: If a Patient rejects the verification, the Service and Visit Time fields remain Unverified (red text).

### **Alternate EVV System Verification (Offline Support)**

The **Alternate EVV Workflow** option has been extended to include Offline support, Consecutive Shifts and Linked Patients workflows. For Linked Patients, both Patients must verify and confirm the visit at the end of workflow.

- Consecutive Shifts: Existing Patient Confirmation at the end of the workflow
- Offline mode: Transparent Patient Confirmation
- Linked Patients: Both Patients must confirm

**Note:** These workflows also work in the Offline mode.



# **Capturing Caregiver and Nurse Signatures**

The system has been updated to comply with certain EVV state requirements such as capturing and storing additional signatures from the Caregiver and Nurse (if configured), in addition to the Patient Signature. As configured in the system at a Contract level, the Caregiver is presented with these signature screens when Clocking In and/or Clocking Out of a visit.

### **Capturing Signatures**

In the *Contract Setup* (*Admin > Contract Search > Contract*), two signature requirement options have been added to the *Scheduling/Confirmation* tab to capture the **Caregiver Signature** and **RN Signature** on the Mobile App, as seen in the following image.

Capture Patient Signature on Mobile App:	At Clock In  At Clock Out
-	<ul> <li>Allow Signature Skip</li> <li>Require Timesheet if EVV linked to visit w/o Signature</li> </ul>
Capture Caregiver Signature on Mobile App:	At Clock In  At Clock Out
Capture RN Signature on Mobile App:	At Clock In  At Clock Out

**Contract Setup: Capturing Signature Settings** 

# Additional Signatures on the Mobile App

Based on the selections for these options, signature requirements are presented on the Mobile App when the Caregiver performs a Clock In and/or Clock Out, as configured at the Contract level. All Signature screens contain a different color header to differentiate them from one another.

#### **Caregiver Signature**

Required: If selected

- Caregiver presented with Signature Screen
- Caregiver must sign to proceed (cannot skip)





**Caregiver Signature Screen** 

#### **RN Signature**

Optional: If selected

- RN presented with Signature Screen
- Can be skipped if RN is not present to sign



**RN Signature Screen** 

#### **Patient Signature**

Required: If selected (as configured)

- Patient presented with Signature Screen
- Can be skipped if **Allow Signature Skip** is selected; otherwise, Patient must sign to proceed.



**Patient Signature Screen** 



# **Automatic Time Setting Option**

The Mobile App provides a popup warning suggesting for users to set their device to the Automatic Time setting which automatically synchronizes with the central server clock (to include Daylight Savings Time (DST) updates).

A warning alert is displayed (as seen in the image below) if the time on the user's Mobile App is not in sync with the server. This occurs when the device time setting is NOT using the Automatic Time setting. As suggested, this alert instructs the user to change their settings to ensure proper operation of the application.



Note: HHAX does not change the setting; Users must change their own settings on their device. In addition,

retaining the Manual Time setting does not prevent a user from using the Mobile App.



# **Mobile App Caregiver Compliance Alerts**

The **Mobile App Caregiver Compliance Alerts** feature displays a Caregiver's Compliance status (based on Discipline) directly on their Mobile App; informing them of completed as well as upcoming medical and evaluation due dates (to assist with remaining compliant).

To enable this feature, navigate to the *Office Setup* page (*Admin > Office Setup*). On the *Mobile* section, select the **Allow the Caregiver to view Compliance information via the Mobile App** checkbox. Once selected, indicate the number of days in respective **days before due date** text boxes to:

- Display Medical Items
- Display Other Items
- Display In-Service Items

Allow the Caregiver to view compliance information via the Mobile App:		
Display Medical Items:	days before due date	
Display Other Items:	days before due date	
Display In-Service Items:	days before scheduled class date	

**Office Setup: Caregiver Compliance Alert Feature** 

*Note:* This feature is available to all Agencies on the latest version of the Caregiver Compliance module.

### **Mobile App Compliance Page**

The informational *Compliance* screen on the Mobile App is accessed from the main screen, as seen in the following image. The encircled number in red in the main page indicates the number of items needing attention.





New Compliance Alert Option

Select the *Compliance* option to view high-level information (such as *Type*, *Due Date*, and *Completed Status*) for all the Caregiver's Compliance items, as seen in the image below.



Compliance Screen

- Overdue items have bolded titles under the Name/Type column
- Under the **Completed** column, Overdue items are clearly categorized as *Overdue* and marked with a red dot.

Click on the filter icon (on the top-right) to open a search selection to view specific information. Select the available information such as **Compliance Type**, **Date Range**, or select the **Only Display Past Due** radio button to display only the due items.



<b>K</b> Back	Compliance	?▼	
Compliance 1	Гуре АШ		
Date Range	09/23/2021	Ĩ	
Rubeola MMR Medical	1 01/01/0/07/2021	verdi 🚞	
Only Display I Due	Past 10/08/2021	0	
Search			

**Compliance Screen** 



# **Caregiver Awake/Alert Confirmation**

The **Caregiver Awake Alert Confirmation** feature applies to Caregivers who work overnight shifts. When this feature is enabled, a Caregiver is presented with an *I'm Awake* button at Clock-IN. This function serves as proof to the Agency that the Caregiver is awake and monitoring the Patient. The Caregiver can periodically check in via the *I'm Awake* button throughout the visit.

To enable this feature, navigate to the *Office Setup* page (*Admin > Office Setup*). On the *Mobile* section, select the **Enable the I'm Awake button for midnight shifts** checkbox.



**Note:** Selecting this option enables the feature for <u>all</u> Caregivers in the Office.

**Office Setup: Caregiver Compliance Alert Feature** 

### **On the Mobile App**

Once the feature is enabled, the Caregiver is presented with an *I'm Awake* button after Clock-In (as seen in the image below) as proof that they are awake and servicing the Patient.

<b>く</b> Back	Visit Detail Danny Baker		?	) 🕀
	Clo	ck In/Out	Directions	
09/29 at <b>11</b>	:00PM	M 09/30 at <b>12:00AM</b>		
Cloc		Clock Out		
Confirmed: 04:26 PM 😵				
I'm Awake				
Last Check In: Just Now				

Mobile App: I'm Awake Button


When clicking on the *I'm Awake* button, the **Confirmed** time is captured and a timer begins to clock Check In status. The Check In status is displayed under the button (indicating the duration since the last Check In, as seen in the image below).



Last Check In

Note: The Caregiver can periodically check in via the I'm Awake button throughout the visit.

## **Caregiver Awake Confirmation Dashboard**

Providers can review and monitor activity via the *Caregiver Awake Confirmation Dashboard* (*Visit > Caregiver Awake Confirmation Dashboard*), as seen in the following image. This Dashboard is comprised of two sections to include search filters and search results.

Use the search filters to locate a specific visit or click the *Search* button to see all. On the *Search Results*, each row offers details such as the **Visit Date**, **Visit Time**, **Patient Name**, **Caregiver Name**, (number of) **Check-Ins**, **Times** (checked in) and a **Plot** icon.

	Confirmation Da	ishboard									
Caregiver A	Awake Confirma	tion - Search									
Office	(s): All	~	Contract:	All	~	Patient Coordinator:	All	~	Caregiver Team:	All	
* From Da	ate: 08/16/2020		* To Date:	09/16/2020		Display options for midnight shifts:	Show all visits				
Patie	ent: Select Patient	t(s)			$\sim$	Caregiver:	k anjan $ imes$			:	×
Caregiver Search Res	Awake Confirma	ation								Page 1	
Caregiver Search Rest <u>Visit Date</u>	Awake Confirma ults: Check Ins (8 <u>Visit Time</u>	ation ) <u>Patient Name</u>			Caregiv	ver Name	1	<u>Check Ins</u>	Times	Page 1	Lo
Caregiver Search Rest <u>Visit Date</u> 09/16/2020	Awake Confirm ults: Check Ins (8 <u>Visit Time</u> <u>93:15 -</u>	ation ) Patient Name phi one, patient			<u>Caregiv</u> k, anjar	ver Name	<u>-</u>	<u>Check Ins</u> 2	Times 12:48, 12:49	Page 1 F	
Caregiver Search Resi <u>Visit Date</u> 09/16/2020 09/16/2020	Awake Confirma ults: Check Ins (8 <u>Visit Time</u> 03:15 - 00:00 - 01:00	ation Patient Name phi one, patient phi one, patient			<u>Caregiv</u> k, anjar k, anjar	ver Name	:	<u>Check Ins</u> 2	<u>Times</u> 12:48, 12:49	Page 1 F	
Caregiver Search Res Visit Date 09/16/2020 09/16/2020 09/14/2020	Awake Confirma ults: Check Ins (8 <u>Visit Time</u> 03:15 - 00:00 - 01:00 02:00 -	ation Patient Name phi one, patient phi one, patient phi one, patient			<u>Caregin</u> k, anjar k, anjar k, anjar	ver Name	:	Check Ins 2	Times 12:48, 12:49 02:05, 02:17	Page 1 E	

**Caregiver Awake Confirmation Dashboard** 

To view a graphical representation of visit Check-In activity on a continuum (from the time of Clock-IN to the time of Clock-OUT), click on the *Plot* icon for the visit. Each Check-In is represented by a red encircled dot and time. Click *OK* to exit this window.



ſ	HHAeXchange - Che	ck Ins								×
	Patient Name	e: Niro, Robert				Shift Star	rt: Sep 11, 2020 00:0	D -1		
	Caregiver Name	e: hha, no				Shift En	<b>d:</b> Sep 11, 2020 03:0	D -1		
				01:13	01:20			02:01		
				$\odot$	$\odot$			$\odot$		
			01:00					02:00		
									<b>A</b>	
	Clock In 00:15								Clock Out 02:15	
	1									•
					ок					

Awake Visit Check-Ins



# **GPS EVV Method to Reduce OOR Exceptions**

To reduce the number of *Out Of Range* (OOR) calls on the Call Dashboard, the Mobile App provides guidance to a Caregiver using the GPS EVV method. A Caregiver is presented with their real-time location on a map relative to the Patient before committing to the Clock-In and Clock-Out. The application can provide guidance to move closer to the Patient to be within the established tolerance range defined by the agency.

In the *Mobile* section of the *Office Setup* page (*Admin > Office Setup*), select the **Mobile GPS Visit** Verification checkbox and define the **Tolerance Range**.



Office Setup: Mobile GPS Visit Verification Tolerance Range

Note: Recommended setting is 300 feet.

## Warning Confirmation Tolerance Range below 300 Feet

The system is set to issue a warning confirmation (as seen in the following image) when the Mobile GPS

Visit Verification Tolerance Range is set to less than 300 feet; the recommended minimum value.



Warning: Tolerance Range Less than 300 Feet



## **On the Mobile App**

Once enabled, a Caregiver using the GPS EVV method, is presented with a real-time map location relative to the Patient address. This helps them evaluate and approximate to an "In Range" coordinate before confirming a Clock-In or Clock Out.

The Patient is represented by the blue dot in the middle, and the Caregiver is represented by a blue dot and arrow (serving as a directional compass as the Caregiver moves). The light blue circle represents the Tolerance Range in feet (as defined by the Agency; capped at 1,000 feet). Guidance is provided below the map assisting with proximity.

The following image indicates that the Caregiver is likely **Out of Range**.



Mobile App: Out of Range

The image below illustrates the Caregiver closer to the Patient and **In Range**. Once **In Range**, the Caregiver can click on the **Confirm** button to capture the EVV.





Mobile App: In Range



# **Patient Address PIN on GPS Map Confirmation**

A PIN denotes the Patient Address in the GPS Map View at Clock In and Clock Out when the Patient Address is not GPS-enabled. If there are coordinates available (latitude and longitude), then the PIN for the Patient Address is displayed as a blue dot surrounded by a light blue circle indicating the tolerance range (as seen in the image below).



**Patient Address with Coordinates** 

When the Caregiver clicks on the *Confirm* button, a message alerts that there may an issue with the Patient Address. It is recommended to contact the Agency to report (as seen in the image below).





**Alert: Issues with Patient Address** 

In cases where the Patient Address is not GPS-enabled without available coordinates, the screen displays only the Caregiver location, as denoted by the blue dot and arrow. The Patient Address is listed at the bottom of the screen (highlighted in the image). When the Caregiver clicks on the *Confirm* button, the same alert (as seen in the image above) appears.

Back	Visit Detail Jeet Shah	
	Clock In/Out	Directions
~~~~	,,,,,,,	
414		
uviaps		Legal
Distance to	rk Avenue, New York, 70 patient address cannot	be calculated

Patient Address without Coordinates

Note: To prevent issues with a Patient Address, it is recommended that the GPS is enabled in the system.



# **Post-Visit POC Edit Time**

Providers can set the allowed time that a Caregiver must add or edit the POC for a visit on the Mobile App. In the past, the time was a fixed 26-hour post-visit window.

To update this setting, navigate to the *Mobile* section in the *Office Setup* page (*Admin > Office Setup*). Enter the number of hours (0-999) in the **Time in hours that a Caregiver can update Duties after a Patient Visit** text field.



Office Setup: Post-Visit POC Edit Time

Note: The default setting is 26 hours.

There is no difference in the Mobile App. The Caregiver continues to see the Patient POC and make applicable edits in the time defined by the Agency.



# **Mobile: Extend Visit End Time**

The **Extend the Visit End Time** setting allows Providers to determine the exact end time for a shift within the Caregivers clock-out process. This setting extends the Visit End Time beyond the timestamp that occurs once **Clock Out** is selected on the Mobile App, accounting for the time spent thereafter entering required information (such as POC duties, VBC duties, and Patient Signature).

With this setting enabled, the **Visit End Time** is captured once the Caregiver completes all required visit information on the Mobile App. The **Extend the visit end time to include time to enter duties** setting is selected by default (as seen in the following image), in the *Office Setup* page (*Admin > Office Setup*) and in the *Mobile* section.



Office Setup: Mobile: Extend Visit End Time

## **On the Mobile App**

Once all information is entered, the Caregiver is advised of a successful Clock Out, as illustrated in the image below.

Kack Visit Detail (?) (2) (+)										
Clock In/Out Directions										
10/01 at 01:00AM 10/01 at 01:15AM										
Clock In Clock Out										
Confirmed: 07:25AM 🗸 Confirmed: 07:51AM 🗸										
Visit Verification Status										
Service: HHA (Verified)										
Visit Time: 07:25AM - 07:51AM (Verified)										
You have been successfully Clocked Out.										
ОК										

Successful Clock Out



# Prevent Restricted Caregivers from Viewing Patient Information

When a Caregiver is placed on a Patient's Restriction list (*Patient > Caregiver HX > Declined Caregivers*), the Patient information is hidden on the Mobile App, even if they previously serviced the Patient.

Patient information is hidden on the Caregiver's Mobile App as of the date of restriction until the restriction is removed. Once the restriction is removed, the Patient information reappears once the Caregiver is scheduled to service the Patient. The Patient will only display on the Patients tab after the next scheduled visit is created based on the aging view rules, as follows:

- Unscheduled visit: Not displayed after 30 days
- Patients tab: Not displayed after 15 days
- Visits Tab: 7 days (Caregiver can search a past date for up to one year to see Patient info)

This update applies to the following screens: **Today's Schedule**, **Unscheduled Visits**, **Visits**, **Patients**, and **Open Shifts**.



# **Mobile App Integration**

HHAeXchange works with many integration partners. The following image illustrates the banner that appears on the HHAX Mobile App Home screen once an Agency purchases one or more integration services. Click on the *Go* button to open the integration partners' websites.



Mobile App: Integration Services Banner



# Mobile App Biometric Two-Factor Authentication

The **Mobile App Biometric Two-Factor Authentication** (2FA) allows Agencies to add another layer of security to the login process on the Mobile App. Once activated, mobile-enabled Caregivers must perform 2FA with fingerprint or facial recognition biometrics, if supported by their device.

## **Office Level Setting**

To enable the Mobile App Biometric Two-Factor Authentication setting, navigate to the *Office Setup* page (*Admin > Office Setup*) and select the **Enable Mobile App Biometric Two-Factor Authentication** checkbox in the *Mobile* section, as seen in the following image. Once the feature is enabled at the Office level, all mobile-enabled Caregivers are prompted to perform 2FA after logging into the app.

Mobile	History
Mobile Fixed Visit Verification: 🗹 🛈	* Mobile GPS Visit Verification: 🗹 Tolerance Range (ft): 🚺 👔
UnBalanced Tolerance: Hours 22 Min 30 1	Mobile Beacon Verification: 🗌 🛈
<ul> <li>✓ View Open Cases (1)</li> <li>Open Case Settings: ✓ Request and Accept Open Cases (1)</li> <li>✓ Acceptance Request Limit 52</li> </ul>	Allow Single Clock in/out for Consecutive Shifts  (Mobile App):  (
Enable Mobile App Offline Mode: 🗌	Allow Caregivers to modify Confirmed Time via the 🗌 🕦
Mobile Offline Sync Period: 55 ()	Allow Caregivers to enter Time via the Mobile App 🗹 🕕
Enable Alternate EVV Workflow: 🗹 🛈	Allow the Caregiver to view compliance information 🗹 🕕
Verification Order: Voice Recording V	Display Medical Items: 🗹 25 days before due date
Require Timesheet if EVV linked to Visit w/o verification:	Display Other Items: 🗹 🔟 days before due date
	Display In-Service Items: 🗹 💷 days before scheduled class date
Time in hours that a Caregiver can update Duties 30 (1)	Enable the I'm Awake button for midnight shifts: 🗹 🛈
Extend the visit end time to include time to enter 🗹 🛈	Allow Users and Caregivers to use the Chat Service: 🗹 🕕
Allow Caregiver to select the visit as a Community U (1) visit:	Enable Mobile App Biometric Two Factor Authentication:

Office Setup: Mobile: Enable Mobile App Biometric 2FA Checkbox

## **Caregiver Profile Setting**

The Mobile App Biometric Two-Factor Authentication setting can also be managed in the Caregiver Profile in the *Demographics* section, as seen in the following image. For example, for those Caregivers who do not have a device that supports the feature, select *No* (disable) in the **Enable Mobile App Two Factor Authentication** field. The setting at the Caregiver Profile level overrides the Office level setting.



Profile				Profile Lo	g <u>Print Profile</u>		
Demographics					History		
* First Name:		Middle Name:					
* Last Name:		* Initials:					
* Gender:		* DOB:	(	<u>э</u> н			
* Caregiver Code:		Alt. Caregiver Code:			Upload		
<ol> <li>Caregiver Mobile ID:</li> </ol>	Active	🚺 * Mobile Type:	Clinical		Ficture		
<ol> <li>Enable Mobile Chat:</li> </ol>	res	(i) Mobile Device ID:					
Time & Att. PIN:		Enable Mobile App Biometric Two     Factor Authentication:	Yes				
SSN#:	<u>ін</u>	Ethnicity:					
Rehire :	No Rehire Date :	Country of Birth:					
Marital Status:		Picture:	Picture:				
Dependents:		<ol> <li>Secondary Offices:</li> </ol>	-				

Caregiver Profile: Enable Mobile App Biometric 2FA Setting

Note: If this setting is not enabled at the Office level, then it is not available to edit in the Caregiver Profile.

# Mobile Biometric Two-Factor Authentication (On the Mobile App)

On the Mobile App, Caregivers are prompted to authenticate their login via biometric measures, as configured by the Agency. Some Agencies may configure biometric two-factor authentication for stronger security. The Biometric options currently supported are fingerprint and facial recognition if available on the mobile device.

#### **Facial Recognition**

The following image illustrates the screen when facial recognition is required for authentication.



Facial Recognition Required

Once confirmed, the app alerts of a successful facial recognition and logs the user in.





If facial recognition is not successful, the app alerts to retry, as seen in the imagebelow.



**Face Not Recognized** 



#### **Fingerprint Recognition**

The following images illustrate a sequence of screens (from top to bottom) when fingerprint recognition is required for authentication. The initial screen prompts the user to press on the **Use your Fingerprint** box to authenticate.



Fingerprint Recognition Required

The following screen prompts for the user to perform the **Touch ID for HHAeXchange**, using the applicable device feature.



Use Touch ID to Authenticate

If the authentication cannot be verified, the device prompts the user to retry the fingerprint authentication.





**Retry Authentication** 

#### **Biometric Authentication Not Configured/Supported**

If the device is either not configured or does not support fingerprint or facial recognition, then the screen indicates steps to take, as seen in the image below. Tap on the *Settings* button to configure the feature or tap on the *Exit* button and contact the Agency for further instructions.



**Device Not Configured/Supported** 



# **Mobile App: Community Visits**

This option allows Agencies to link a visit marked as a **Community Visit** to bypass the validation for tolerance set in Office Settings in the *Mobile* section. When enabled, visits marked as Community Visits are linked automatically. The **Community Visit** option applies to *Scheduled* and *Unscheduled Visits*.

## **Office Level Setting**

To enable the *Community Visit* setting, navigate to the *Office Setup* page (*Admin > Office Setup*) and select the **Allow Caregiver to select the visit as a Community visit** checkbox in the *Mobile* section, as seen in the following image. Once the feature is enabled at the Office level, all mobile-enabled Caregivers can select the Community Visit option on the HHAX Mobile App.

Mobile	
Mobile Fixed Visit Verification: 🗹 🛈	
UnBalanced Tolerance: Hours 22 Min 30	
<ul> <li>View Open Cases (1)</li> <li>Open Case Settings: Request and Accept Open Cases (1)</li> <li>Acceptance Request Limit 52</li> </ul>	Allow Single Clock
Enable Mobile App Offline Mode: 🗌 (1)	Allow Caregivers,
Time in hours that a Caregiver can update 30 1	Enable the I'm Awak
Extend the visit end time to include time to enter duties: 🗌 🛈	Allow Users ap
Allow Caregiver to select the visit as a Community visit:	Enable Mo

Office Setup: Mobile: Allow Caregiver to Select Community Visit Checkbox

## **Caregiver Level Setting**

When the **Allow Caregiver to select the visit as a Community Visit** feature is enabled at the Office level, all mobile-enabled app users can use the feature. An Agency can override the Office level configuration for a specific Caregiver via their Caregiver Profile (*Caregiver > Profile*).

On the *Caregiver Profile*, click on the *Edit* button to enable editing in the profile. Deselect the **Allow Caregiver to select the visit as a Community visit** checkbox to disable the setting.



Profile		Profile Log Print Profile
Demographics		<u>History</u>
* First Name:	Middle Name:	
* Last Name:	* Initials:	
* Gender: Female V	* DOB:	🔲 🛈 Н 🍃
* Caregiver Code:	Alt. Caregiver Code:	Upload Picture
i Caregiver Mobile ID:	(i) * Mobile Type: Clinical	~
🛈 Enable Mobile Chat: 🗹	(1) Mobile Device ID:	
Time & Att. PIN:		
Enable Mobile App Biometric Two     Factor Authentication:	Allow Caregiver to select the visit as a Community visit:	
* SSN#:	① H Ethnicity: Select	*
(e.g. xxx-xx-xxxx) Rehire : Rehire Date	) Country of Birth:	
Marital Status: Şelect 💙	Picture: 🛽	

**Caregiver Profile: Caregiver Community Visit Setting** 

## **Community Visits (On the Mobile App)**

On the Mobile App, Caregivers can mark a visit as a *Community Visit* by clicking on the store icon located at the bottom-left of the screen, as seen in the following image. The **Community Visit** checkbox appears.



**Community Visit Option** 

Select the checkbox and tap on the *Confirm* button, as seen in the following image.





**Community Visit Selected** 

**Note:** The Community Visit option can be selected and deselected at Clock In and at Clock Out.



# Mobile App: Unscheduled Visits Select Service Code

Select the **Enable Unscheduled Visit Service Code Selection** checkbox in the *Edit Office* page (*Admin* > *Office Setup*) in the *Mobile* section for the Caregiver to select the applicable visit Service Code on *Clock In* for an Unscheduled Visit. This feature appears if multiple Service Codes are available in the Member's Active Authorizations.

Enable Alternate EVV Workflow:	
Verification Order:	Voice Recording 🗸 🛈
Require Timesheet if EVV linked to Visit w/o verification:	• <b>©</b>
Time in hours that a Caregiver can update Duties after a Patient Visit:	10 ()
Extend the visit end time to include time to enter duties:	<b>v</b> ()
Allow Caregiver to select the visit as a Community visit:	☑ ①
Enable Unscheduled Visit Service Code Selection:	
Address	

**Enable Unscheduled Visit Service Code Selection** 

## **On the Mobile App**

From the Visit Detail screen, select the applicable **Service Code**.

Back	Visit Detail 18 jan 18 jan	3
	Clock In/Out	Directions
Service Code	* Required	
Select a Ser	vice Code	
Select a Ser	vice Code	
HHA GUIId I	Non skilled	
HHA Visit		
- Plan of Ca	are Tasks	
No Plan of C	are (POC) task associated to is is in error contact your ag	with this visit pency
43		

Selecting a Service Code for an Unscheduled Visit

If only one Service Code is available in the Member's Active Authorizations, then that Service Code is automatically selected and displayed at *Clock In*.





**Only One Service Code Available** 

On *Clock Out*, the Caregiver can change the visit's Service Code if another Code is available.

<b>K</b> Back	Visit Detail 18 jan 18 jan	0
	Clock In/Out	Directions
Service Code	* Required	
HHA GUILD N	Non skilled	Ψ.
Clo	sk In	Clock Out
Confirmed: 0	8:48PM 🗸	

**Changing Service Code on Clock Out** 



# **Configuration for Other POC Duties**

By default, the **Display Other POC Duties when there are POC Duties assigned** and **Display Other POC** 

**Duties when there are no POC Duties assigned** are selected allowing Providers to control the display of *Other Tasks* (POC Duties) on the Mobile App, as seen in the following image.

ےn کا کے معرفہ معرفادی کا کہ کہ کا کہ معرفہ کا کہ کا کہ کا کہ کا کہ کا کہ	× ×	~ ~	`	~	×	$\sim$	~	~	~	~	~	~	$\sim$	$\sim$	~	~	~
Display Other POC Duties when there are POC Duties assigned:				Dis	play	y Ot	her	РОС	Dui	ies -PO	whe C Du	n the ities	ere a assi	are i igne	10 d:	2 (	)

**Mobile Office Level: Other POC Duties Checkboxes** 

Providers can choose to disable these settings to reduce overhead and clutter.

## On the Mobile App

When these settings are disabled by the Provider, the *Other Tasks* (POC Duties) section appears empty on the Mobile App, as seen in the following image.



**Mobile App: Other Tasks Section** 



# **Patient POC on Unscheduled Visits**

The system has been enhanced to present duties on the Mobile App when an Unscheduled Visit is created for a Patient with an active authorization and an associated POC. The POC is automatically selected and viewed via the *Automatic Creation of Schedules* feature (*Visit > Call Dashboard > Automatic Creation of Schedules*), as seen in the following screen.

Schedule Search Results Total Calls (7)										
	<u>Call Date</u>	<u>Aide Name</u>	Member Name	Call In/Out	Schedule	РОС	Bill To	Service Code	Pay Code	Action
	May 26 2022 12:00AM	Shah Jeet Ex (333-6468)	Shah Jeet linked 1 (333- 9000205985386560)	0824 /	0830 -	Select 🔻	Jeet Con ▼	Select v	HHA Hourly 🔻	Save
	May 24 2022 12:00AM	Shah Jeet Ex (333-6468)	Shah Jeet linked 1 (333- 9000205985386560)	0324 / 0325	0330 - 0330	2276918-04/24/ 🔻	Jeet Con 🔻	Select v	HHA Hourly v	Save
	May 26 2022 12:00AM	Shah Jeet Ex (333-6468)	Shah Jeet linked 1 (333- 9000205985386560)	0816 / 0816	0815 - 0815	2276918-04/24/ 🔻	Jeet Con 🔻	Select v	HHA Hourly v	Save
	1 v 2 202	S NU VE	Shirtlined (33	N. 9. 19	~~~~~					
Process and Continue Working Process and Close Cancel										

#### Associated POC

## On the Mobile App

When the Caregiver Clocks-Out of the Unscheduled Visit, the *Plan of Care Tasks* are displayed when an *Unscheduled Visit* is created for a Patient who has *one* active Authorization with POC Tasks.



POC Tasks Displayed for Unscheduled Visit



If no *Plan of Care Tasks* exist for the Patient, or if *more than one* active Authorization with POC Tasks exists for the Patient, the **Plan of Care Tasks** section indicates that no POC Tasks are associated with the Unscheduled Visit.



# Log Duties Throughout the Shift

Caregivers can enter or edit POC/VBC duties via the Mobile App throughout a visit as they are performed. Alerts will not be generated until after the Clock Out and duties are saved.

To enable this feature, navigate to the *Mobile App* section in the *Edit Office* page (*Admin > Office Setup*) and select the **Allow Caregiver to Log Duties after Clock In** checkbox.



Edit Office: Mobile App Section: Log Duties After Clock In Checkbox

### **On the Mobile App**

When this option is enabled by the Agency, the **Duties** tab displays once the Caregiver Clocks In. From the *Duties* tab, the Caregiver can log tasks performed throughout the visit. Upon Clock Out, the Caregiver can add and/or modify tasks performed throughout the visit.



**Duties Tab**