



GENERATIONS®

Homecare System




Presenter




Customer Success Manager

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EVV - GPS & Geolocations

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- GPS
 - ◆ What is it and how does it work?
 - ◆ What are GPS Coordinates?

 - Geolocation
 - ◆ How does Generations assign Geolocations?
 - ◆ GeolocationStatus'
 - ◆ How can I update Geolocations?

 - Additional Features
 - ◆ Mapping and Routing
 - ◆ Map and Navigate on the Caregiver App

What is GPS and how does it work?

- 
- GPS stands for Global Positioning System
 - Made up of 3 parts - Ground Stations (towers), Satellites, and Receivers (personal device such as a cell phone or tablet)
 - ◆ Ground Stations - The ground stations use radar to make sure they are actually where we think they are.
 - ◆ Satellites - Satellites act like the stars in constellations—we know where they are supposed to be at any given time.
 - ◆ Receivers - A receiver, like you might find in your phone or in your car, is constantly listening for a signal from these satellites. The receiver figures out how far away they are from some of them.
 - Once the receiver calculates its distance from four or more satellites, it knows exactly where you are. Presto! From miles up in space your location on the ground can be determined with incredible precision! They can usually determine where you are within a few yards of your actual location. More high-tech receivers, though, can figure out where you are to within a few inches!

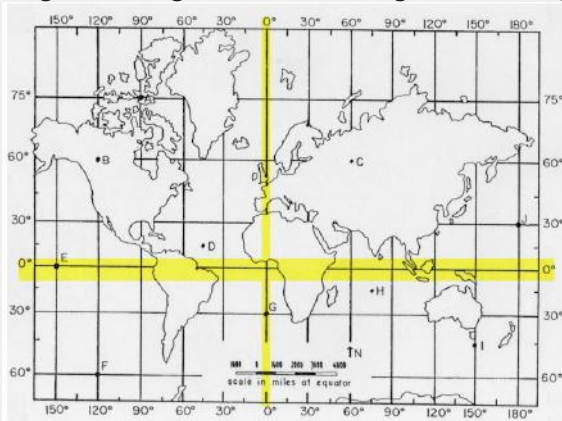
Information on GPS functionality gathered from:

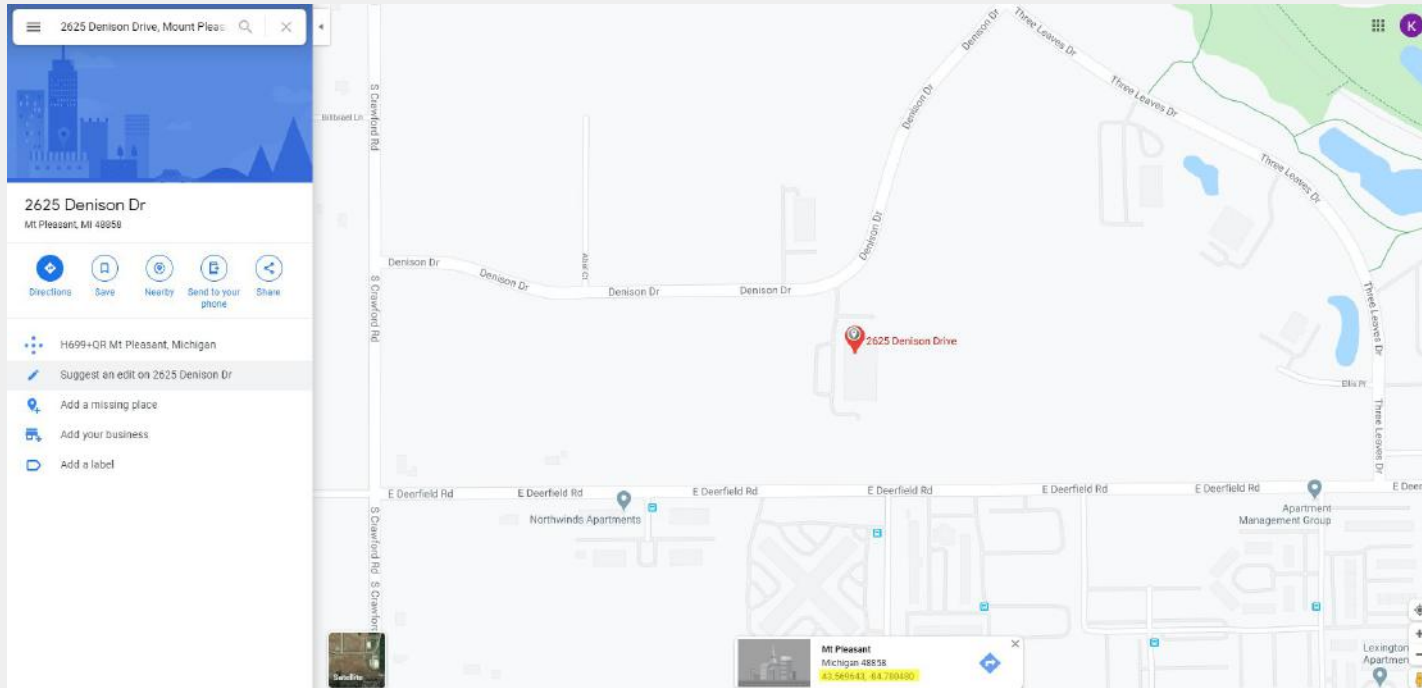
<https://spaceplace.nasa.gov/gps/en/#:~:text=GPS%20is%20a%20system%20of%2030%2B%20navigation%20satellites%20circling%20Earth.&text=A%20GPS%20receiver%20in%20your.is%20surrounded%20by%20navigation%20satellites.>

What do GPS coordinates look like?

- Latitude - This specifies the north-south position in relation to the equator.
 - ◆ The Equator is an imaginary line drawn around the earth equally distant from the North and South Poles.
 - ◆ Positive Latitude - If the Latitude is a positive number, then the location is north of the equator.
 - ◆ Negative Latitude - If the Latitude is a negative number, then the location is south of the equator.

- Longitude - This specifies the east-west position in relation to the Prime Meridian.
 - ◆ Prime Meridian is in imaginary line that runs north to south through Greenwich, England.
 - ◆ Positive Longitude - If the Longitude is a positive number, then the location is east of the Prime Meridian.
 - ◆ Negative Longitude - If the Longitude is a negative number, then the location is west of the Prime Meridian.





- GPS Example - 2625 Denison Drive, Mt. Pleasant, MI 48858 (Home Office for Generations)
- Latitude: 46.569643
- Longitude: -84.780480

How does Generations assign Geolocations?

- Generations utilizes Google Maps to determine the Latitude/Longitude based on the Home Address on the Client and Caregiver Profiles.
- Geolocation is automatically set when the Home Address is saved. Any change to a Client or Caregiver address causes Generations to recode the Geolocation.
- Enter the street address in Address 1 field. If there's any additional info, such as a unit, apartment, etc., add that information in Address 2.
- Sometimes special characters such as hashtags (#) in the Address 1 field can confuse Google Maps.
- When adding to the Other EVV Addresses tab, enter the address and click the grey Geocode button before clicking the blue Update button in the bottom right hand corner to save.

Pro tip - Search for the address in Google first so you know exactly what Google recognizes as the correct address for the Client!

The screenshot displays the 'Other EVV Address' tab in the Generations software. The form contains the following elements:

- Home Address** and **Other EVV Address** tabs.
- Description**: A dropdown menu with '----Select----' and '+' and '-' icons.
- Address 1**: A text input field.
- Address 2**: A text input field.
- City/State/Zip**: A text input field with separate boxes for state and zip.
- Start AddressType**: A dropdown menu with '----Select----'.
- End AddressType**: A dropdown menu with '----Select----'.
- Geocode**: A yellow button.
- Geocoded:**: A text field.
- Enable Client Specific 1500** and **Enable UB04**: Two checked checkboxes.
- Billing Version**: Two buttons for 'CMS 1500 Billing Version (08/05)' and 'CMS 1500 Billing Version (02/12)'.
- Alert Note**: A text area with the note 'Make sure to add a note EVERY time you make any changes to the schedule'.

Geolocation

- Refers to the Latitude and Longitude coordinates of a specific location.
- GPS is the system used to pinpoint the Geolocation.
- Use the Column Chooser button on either the Client or Caregiver List to add the “GeolocationStatus” column. This will help you to determine which ones need some adjustment. There are 4 possible Status’:
 - ◆ OK: The address was successfully geocoded.
 - ◆ Partial Match: The address was geocoded, but an exact match was not found. Try using the four-digit zip code extension which you can obtain from the US Post Office website's zip code lookup tool to help pinpoint geolocation.
 - ◆ Fail: Geolocation could not be obtained. If there is no result, the geolocation could not be found based on the address.
 - ◆ Blank: The geolocation status field is blank if you manually added longitude and latitude. If you want Generations to re-code the record, use the Force Re-code button.

The screenshot shows the Generations Homecare System interface. At the top, there is a navigation bar with tabs for Home, Dashboard, Clients, Caregivers, Schedule, Timesheets, Interfaces, EV, Reports, Admin, Caregiver Search, Call Center, and Help. Below this is a sub-navigation bar with 'Clients' and 'Client List' selected. A search bar is present with the text 'Type: Active Clients'. A 'Column Chooser' button is visible, which is used to add the 'GeolocationStatus' column to the table. The table below has columns for Client Name, GeolocationStatus, Location, Client ID, EVW ID, Address, Reason, and End. The 'GeolocationStatus' column is highlighted in yellow for rows 1 through 12, indicating 'Partial Match' or 'OK' status. Rows 15 and 16 are highlighted in grey, indicating 'Fail' status. Row 17 is partially visible and also appears to be a 'Fail'.

	Client Name	GeolocationStatus	Location	Client ID	EVW ID	Address	Reason	End
1	Bivins Michael	Partial Match	CST	20	18888	36 Orange Street		No
2	Bundt Barbara	Partial Match	CST	18	7115	4300 COLLEGIA...		No
3	Devoe Ronnie	Partial Match		21	16545	32 Bergen St		No
4	Griffith Andy	Partial Match	KCC	30	9137	2459 Willow Cir...		No
5	Thompson Tom	Partial Match	122	31		2625 Denison		No
6	Tresvant Ralph	Partial Match		23	10147	55 Sunny Days St.		No
7	Studdard Ruben	OK		25	9876	1030 E Pickard Rd		No
8	Depp Johnny	OK	KCM	6	648297	1188 Sarah Jane...		Yes
9	Made Taylor	OK		41		2625 Denison		No
10	Ortiz Lety	OK	KCE	3	51519	593 S. Woodori...		Yes
11	Cabrera Miguel	OK		8	6497	1107 E. Michiga...		Yes
12	B TEST	OK		33	6699	1817 S Stockma...		Yes
13	Bell Ricky	OK	KCC	22	11472	3115 Saddle Lane		Yes
14	Berkley Elizabeth	OK	KCC	5	1254	2625 Denison Dr.		Yes
15	Paper Work	Fail		17				No
16	James Taylor	Fail		16				No
17	Junior youn	Fail		9				No

Updating Geolocations



- Make an adjustment to the Home Address on either the Client or Caregiver profiles. Any change made will prompt Generations to automatically attempt to recode the Geolocation based on the newly updated address.
- Manually, there are 3 different options for updating Geolocations:
 - ◆ Update Geolocation values using Google Maps.
 - ◆ Use a previous login/logout from a trusted Caregiver to set the Client's Geolocation.
 - ◆ Office Users (with Admin permissions) can set a Client's Geolocation using their phone's Location Services via the App while at the Client's home.

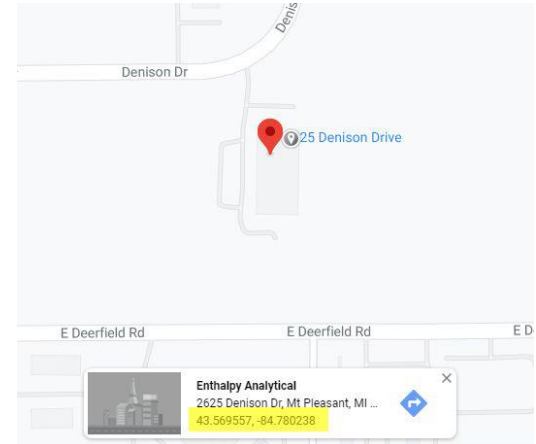
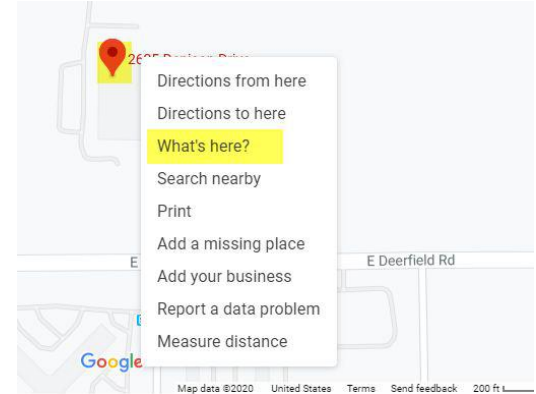
Update Geolocation via Google Maps

Step 1 - Go to www.google.com and type in the home address. If Google gives the address differently, you might consider changing the Client's Home Address to match as that may fix the issue with Geolocation.

Step 2 - Make sure you're looking at the right house, apartment, building, etc. You can left click and hold down the mouse to move the pointer to the exact location of the Client's address. Once you've got the location narrowed down on the screen, right click on the correct address on the map and click "What's here?"

Step 3 - Once you click "What's here?" a little box will appear at the bottom of the screen with the Latitude/Longitude (Geolocation) of that particular address.

Step 4 - (This can be done earlier in the process so it's ready) Go to the Client/Caregiver profile you're working on and click the grey Geolocation button on the right hand side below their picture. Then copy the coordinates from the previous step into the corresponding Latitude/Longitude boxes, and click Submit.



Home Dashboard **Clients** Caregivers Schedule Timesheets Interfaces EVW Reports Admin Caregiver Search Call Center Help

Client List Client Details Shift Requests 4 Messages 0 Alerts 11 Notifications 135 Active Users 1

Information Summary Audit Outlook Email Calendar Close

Client: Berkley, Elizabeth

Geolocation

Geolocation will automatically update when you add or change an address. If the address cannot be found by the geolocation service you can manually set the geolocation using the instructions below. Please note it may take a few minutes for the geolocation to auto update when addresses change.

Geolocation

Latitude

Longitude

Show Map from Address Show Map from Geolocation

Geocode Updated By : Kevin Last Update Result: OK

Geocode Updated On : 08/17/2020 08: 51 PM Fail Reason:

Last Update Attempt: 06/18/2018 02: 34 PM


Manual Set Geolocation

Use the Show Map from Address link to open the client's address in Google Maps. Right-click on the client house or facility and select "What's Here?". The latitude and longitude will appear in the search bar. Copy those values into the fields on this page.

Refresh Force Re-code **Submit** Close

Personal Data Interruptions of Service

Needs Wellness

First Name 

Phone 1 Choose File

Status Maximum Image Size 512x

Reasons Add Picture

Email Delete Picture

Hospital Discharge Prior to SOC Elizabeth B Berkley (5) Active Client

Case Manager Geolocation


Referred By Home Address Other EVW Address

Physician Client Billing Address Additional Payors Additional Physicians

Diagnosis/Code Location ID RCC EW ID 1254

Med Records Accounting ID Priority Weight 138

Use a previous login/logout from a trusted Caregiver to set the Client's Geolocation.



If you have a GPS login from a trusted Caregiver, you can set your Client's Geolocation by using their previously recorded Latitude/Longitude. To do this:

Step 1 -> Under EVV ->select EVV Schedules.

Step 2 -> Filter to the date range that your successful login would fall in. If you know the date, that's even better, but you can always start with a wide timespan and look through all the options. Also filter to the specific Client/Caregiver you're looking for.

Step 3 -> Use Column Chooser to include the "GPS Login" and "GPS Logout" columns so you can easily see which shifts had Telephony and GPS/App logins. Then click on the GPS Login column twice. This will put the results in ascending/descending order. You can quickly pull all of the GPS Logins/outs to the top.

Step 4-> Click the pencil to the left of the shift you select. You can then click on the "View Map" hyperlink to see a map of the actual clock in/out. Once you've confirmed this is the correct login/out that you want to use, click the "Set Geolocation" button to the left of that particular login/logout. Then click Update.

Home Dashboard Clients Caregivers Schedule Timesheets Interfaces **EW** Reports Admin Caregiver Search Call Center Help

EVV EVV Schedules Shift Requests 4 Messages 0 Alerts 11 Notifications 135 Active Users 1

Column Chooser Export Font (+) Font (-) Refresh Import

12/01/2019 - 02/29/2020 Berkley, Elizabeth (All Caregivers) Confirmed All Filters

Auto Refresh every minute Show EVV ID Last Refreshed: 08/17/2020 09:10:44 PM
 Show Color Un-confirmed Confirmed Logged In Available Cancelled

Visit Alert	Task Alert	SDate	Client	Caregiver	Login	Logout	Service	Hours	GPS Login	GPS Logout
		01/14/2020	Berkley, Elizabeth	Johnson, Donald	01/14/2020 11:10 AM	01/14/2020 11:13 AM	Adult Care	00:00	Actual GPS	Actual GPS
		12/30/2019	Berkley, Elizabeth	Johnson, Donald	12/30/2019 10:11 AM	12/30/2019 11:08 AM	Adult Care	00:30	Actual GPS	Actual GPS
		12/20/2019	Berkley, Elizabeth	Allen, Barry	12/20/2019 10:00 AM	12/20/2019 11:02 AM	Adult Care	01:00		
	!	12/02/2019	Berkley, Elizabeth	Allen, Barry			CNA - Level 1	04:00		
	!	12/04/2019	Berkley, Elizabeth	(Available, Shift)			CNA - Level 1	04:00		
	!	12/09/2019	Berkley, Elizabeth	(Available, Shift)			CNA - Level 1	04:00		

Edit EVV Schedule

Schedule Scheduled Tasks Wellness Client QA Visit Notes Other Expenses Charting Time/Task Signature Exceptions Screening

Berkley, Elizabeth: 01/14/2020 11:10 AM

Schedule Details for Schedule ID:5817 Last Updated: (01/14/2020 11:14 AM)(GPS)

Caregiver	Client	Service	Date	Scheduled Start	Scheduled End	Confirmed	Call In	Call Out
Johnson, Donald	Berkley, Elizabeth	Adult Care	01/14/2020	11:10 AM	11:13 AM	<input checked="" type="checkbox"/>	11:10 AM	11:13 AM

Cancelled Shift

- Match to Schedule: To manually assign a call to a schedule click Match to Schedule button in the list.
- Set Geolocation: Updates the clients Geolocation to coordinates recorded at the visit.
- Unmatch Call: Removes the matching call from the schedule.

1 to 2 of 2 Records

	Call Time	Rounded Time	Purpose	CallerID/GPS	CallerID_Name	Schedule	Import Time	Wrong In/OUT	Distance	Call Type
	01/14/2020 11:10 AM	01/14/2020 11:10 AM	login	43.569663400000,-84.780596410000	View Map	5817	01/14/2020 11:10 AM	<input type="checkbox"/>	Verified	Actual GPS
	01/14/2020 11:10 AM	01/14/2020 11:10 AM		43.569663400000,-84.780596410000			01/14/2020 11:10 AM			Actual

Audit Trail Confirm Schedule Update Close

Set Geolocation by an Office User via the App



This option works best if you have an Office User that also does field work like an initial visit or a Supervisory Visit with a Client. To utilize this option, the Office User must download the Generations App and login with their Office User profile. Admin permissions are required for this option.

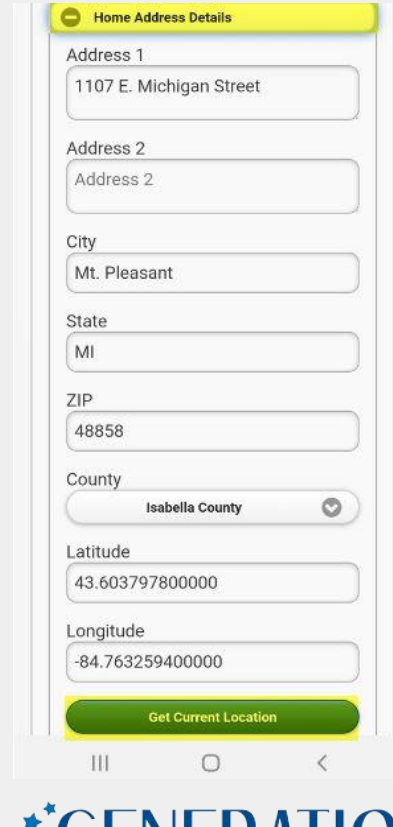
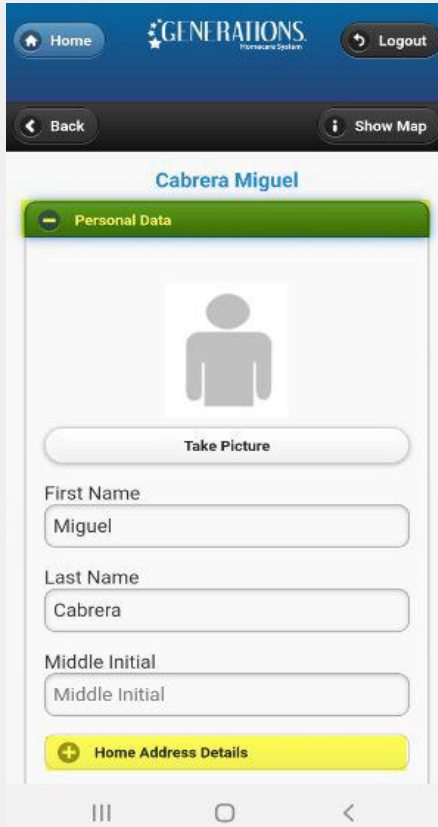
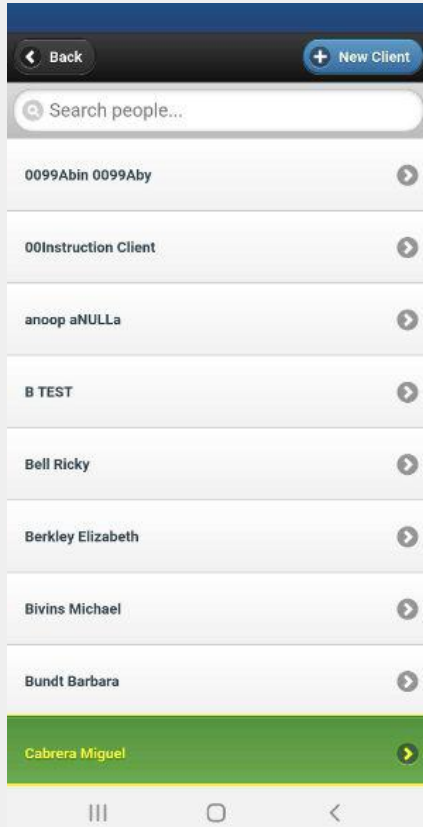
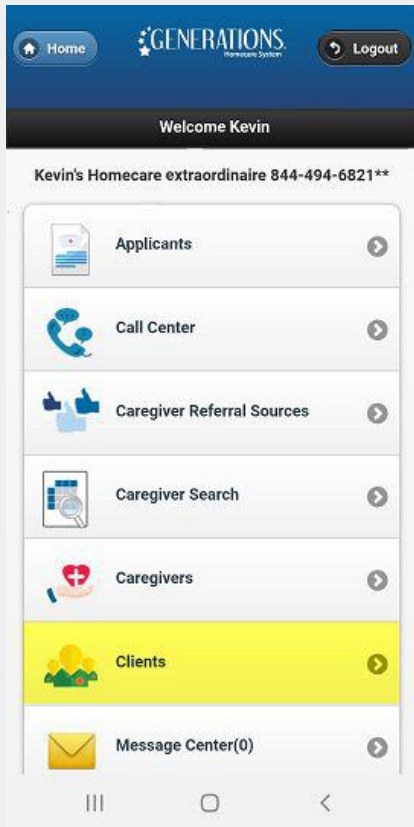
Step 1 - Scroll down to Clients and then select the Client you are working with.

Step 2 - Click on the top Personal Data tab.

Step 3 - Click on Home Address Details.

Step 4 - Click on the blue “Get Current Location” button.

Step 5 - Then scroll down to the bottom of the Personal Data section and click the blue “Save” button.



Mapping and Routing



Plot locations or get directions between Clients, Caregivers, Applicants, Case Managers, Physicians, and/or Referral Sources using the Mapping icon on the Home Page. You can also filter by the Location, Class, Classification or the City.

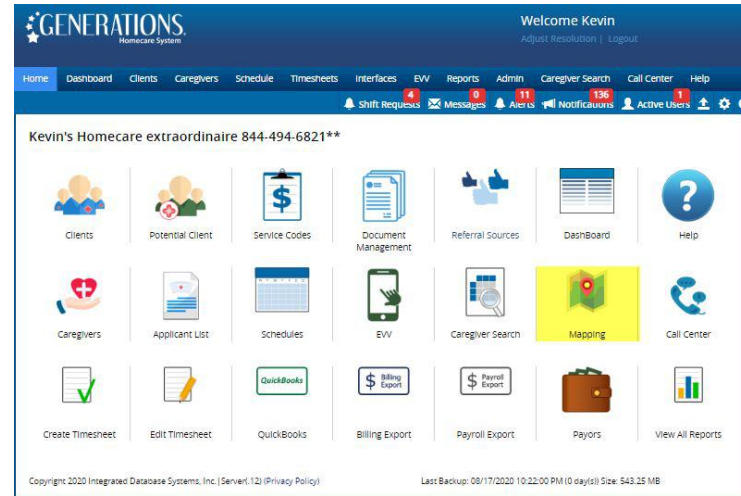
First, click on the Mapping icon on the Home Page.

Then you can select your people from the list on the left -

OR

Click the Filter button to limit the list. If you're just looking for Clients, remove the other People Type options. Click Save.

Then select your people from the list on the left, click the blue -> arrow to push those names to the right column, and lastly select Map All, Plot on Map, or Turn-by-Turn.



Custom Directions and Routing

Filtered List Filter ?

Location	Type
(Office)	Office
#Caregiver Procedures	Caregiver
0099Abin 0099Aby	Client
00Instruction Client	Client
Adams, Dr. James	Physician
Allen Barry	Caregiver
anoop aNULLa	Client
B TEST	Client
Barkley Charles	Caregiver
Bell Ricky	Client
Berkley Elizabeth	Client
Betty Crocker	Referral
Bivins Michael	Client
Brady Thomas	Case manager
Bundt Barbara	Client

Selected Items

Map All Plot on Map Turn-by-Turn Cancel

Custom Directions and Routing

Filtered List Filter ?

Location	Type
(Office)	Office
#Caregiver	
0099Ab	
00Instr	
Adams,	
Allen B	
anoop a	
B TEST	
Barkley	
Bell Ric	
Berkley	
Betty C	
Bivins M	
Brady Thomas	Case manager
Bundt Barbara	Client

Filter Options

People Filter

- Applicants
- Caregivers
- Case Manager
- Clients
- Physician
- Referral Sources

Additional Filter

Location: All Locations

Case Manager: All

Class: All Class

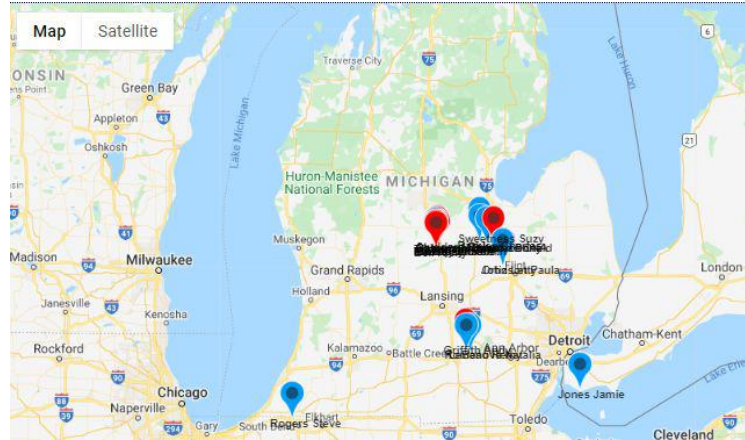
Classification: (All)

City: All

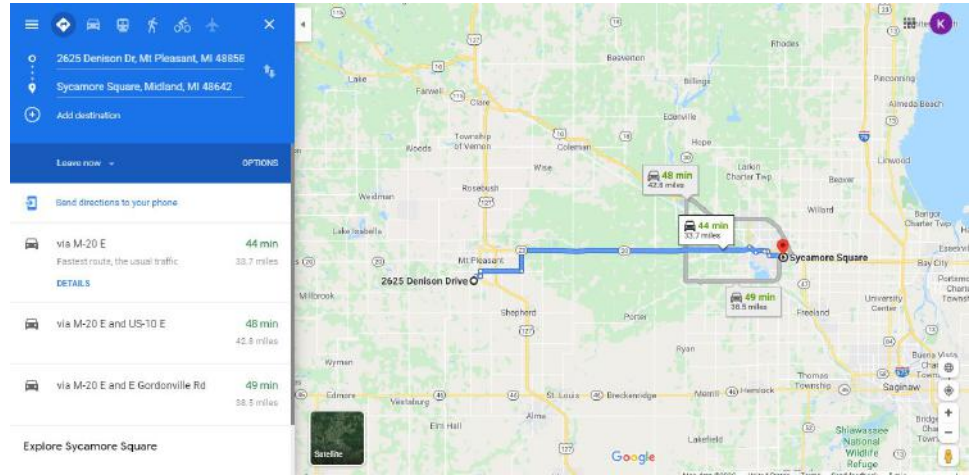
Save Cancel

Map All Plot on Map Turn-by-Turn Cancel

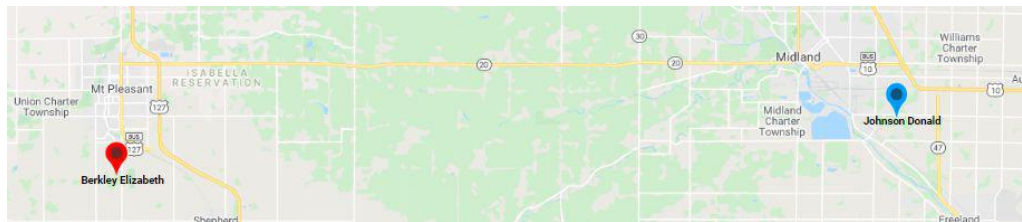
Mapping and Routing continued...



Map All will plot everyone from the list on the left.



Turn-by-Turn gives the directions between the people selected on the list on the right.

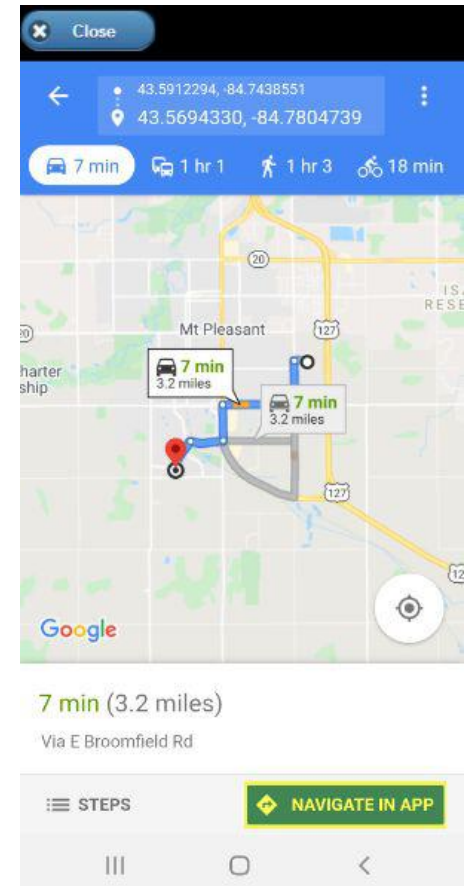
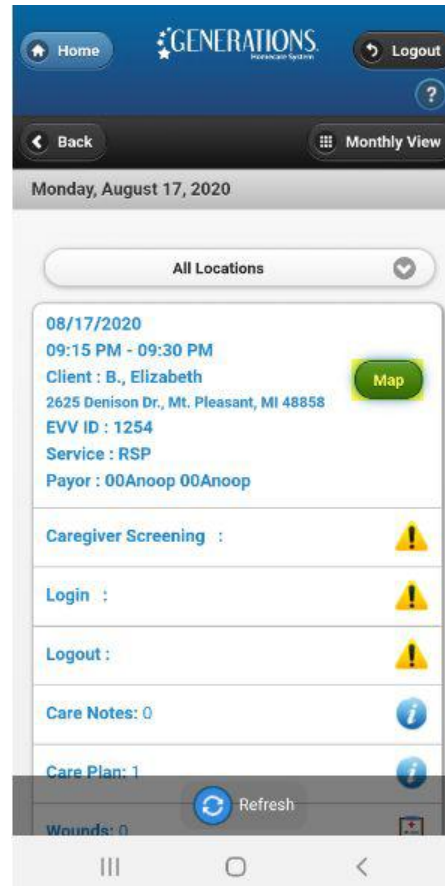


Plot on Map displays the Geolocation of the people selected on the list on the right.

Mapping in the Caregiver's App

Caregivers can get turn-by-turn directions from their current location to their next Client's location via the Map button in the Generations App.

Location Services must be enabled and it's recommended to have any additional options (ex. Google Location Accuracy) enabled as well.



Conclusion



When you make sure your Clients and Caregivers are Geolocated correctly, you can take advantage of some of the additional features in Generations, such as:

- 1) Mapping and Routing
- 2) Limiting the GPS Variance (Maximum distance allowed to clock in/out from the Client's Geolocation)
- 3) For Caregivers - using the Map and Navigate options in the App
- 4) Caregiver Search - Searching by proximity

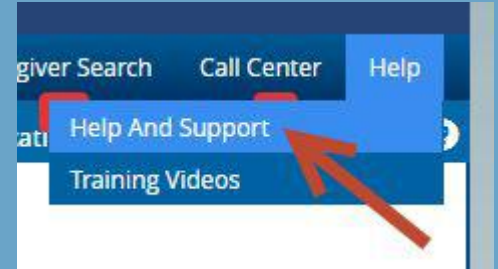
Take the extra time to set up the addresses for the Clients and Caregivers correctly the first time and you won't have to do it again!

Need assistance?

Contact support using Live Chat (M-F 9-5 EST)

- Available from the Help area in Generations, or from
- www.idb-sys.com OR www.homecaresoftware.com
- Email: support@idb-sys.com
- Phone: 989-546-4512

For emergency after-hours support - reach our on-call staff at 989-546-4512 x1





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