






Presenter




Customer Success Manager

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EVV = Electronic Visit Verification

- 
- Electronic timekeeping system used to verify when the employee arrives and departs the client's location.
 - ◆ GPS via Generations App
 - ◆ Telephony
 - ◆ Offline Mode
 - ◆ Manual

 - Additional Features of Generations EVV
 - ◆ Caregiver Screening
 - ◆ Care, Wound, and Visit Notes
 - ◆ Tasks and Wellness Questions
 - ◆ Electronic and Voice Signatures

 - Reports
 - Tips and Tricks

Settings

Generations can automatically confirm your shifts for you as long as your Caregivers call within the Call in AND Call out windows. The number in those boxes represents the number of minutes on BOTH sides of the scheduled starting/ending times. For instance:

If the Call in/out window is 10 and the starting/ending time of the shift is 9 am, then the Caregiver has between 8:50 and 9:10 am to clock in and still be considered “on time”.

Use the Rounding Interval and Round to Scheduled Time options to apply rounding rules to the final confirmed schedules.

Set your GPS distance restriction between 30 and 1000 feet. It is recommended to start with a higher number and then reduce that once you’ve tested it with your Caregivers.

Check the “Do not allow login/logout if caller ID does not match” option and your Caregivers will only be able to clock in using the Client’s phone (number must be on Client profile).

Company Information | Calendar Options | Other Options | QuickBooks | Security | EVV | Online Forms | Web Portal

General Settings | Alert Notifications | Client Quality Assurance | Client EVV Defaults | Time / Task Signature | Screening

Telephony #: 844-494-6821

Caregivers EVV ID

- ☒ EVV ID (Recommended)
- ☐ Last 4 digits SSN
- ☐ SSN

Clients EVV ID

- ☒ EVV ID (Recommended)
- ☐ Client ID (Auto assigned by Generations)

Call Processing

Begin Processing Date: 07/21/2020

Rounding Interval: 0

Call in window: 10

Call out window: 10

Round to Scheduled Time: 0

Minimum Shift Duration: 0

GPS Settings

- ☒ Enable GPS Visit Verification
 - GPS Variance (feet): 100
- ☐ Do not allow login/logout if outside GPS variance
- ☒ Enable mock location(Android Devices)

Enable Assisted GPS [Select Clients](#)

Other Options

- ☒ Auto match client on caller ID
- ☒ Auto record tardy visits in caregiver note after 5 minutes
- ☒ Do not allow login/logout if caller ID does not match
- ☒ Do not update confirmed schedules
- ☐ Prompt caregiver for language (English or Spanish) choice
- ☐ Round early logins to scheduled time
- ☒ Enable Continuous Shift ☐ Enable Check-in Call

EVV Mileage

- ☒ Enable Mileage Prompt [Update Future Schedules](#)
- Default setting for Generations EVV users. Mileage prompt can be set/overridden on each schedule.
- ☒ Import mileage to timesheets
- Mileage Account: MILES2017

[Close](#)

All Locations	
07/20/2020 02:00 PM - 02:15 PM Client : C., Miguel 1107 E. Michigan Street, MI, Pleasant, MI 48858 EVV ID : 8497 Service : RSP Payor :	Map
Caregiver Screening : Pass	Completed → ✓
Login :	To be completed → ⚠
Logout :	To be completed → ⚠
Caregiver Signature :	To be completed → ⚠
Client Signature :	⚠
Care Plan: 1	?
Tasks: 4	📅
Wellness: 3	⚠
Visit Notes: 2	?

[Privacy Policy](#)

- Color coded icons to easily be able to tell what has been completed and what hasn't.
- The Caregiver clicks each item and follows the instructions on the screen. Very easy to use!

Login

This login includes tasks and messaging.

Welcome to Generations EVV.

- Please choose your language. Press 1 for English. Press 2 for Spanish.
- Enter your caregiver ID followed by the pound sign.

EVV Messaging

- You have one message.
- Message one. The doctor's appointment scheduled for today at 2pm has been cancelled. Call office if you have any questions. End of Message one.
- Press 1 to repeat the message.
- Or press any other key to continue.

Confirming Login

- To login press 2, to logout press 3.

Confirming Client

- If you are calling from the home of Michael Scott press 1.
- If this is not the correct client press any other key.
- (If auto match is not enabled, the caregiver must type the Client ID.)

Tasks

- The required tasks to be completed are assist with eating, bathing, oral care.
- The optional tasks to be completed are change bed linens, clean bathroom.
- To repeat the task list press 1.

Completing Login

- Press any other key to finish the call.
- The current time is (real time.) Your call has been saved. Goodbye.

Logout

This logout includes tasks, wellness questions, mileage, and voice signature.

Welcome to Generations EVV.

- Please choose your language. Press 1 for English. Press 2 for Spanish.
- Enter your caregiver ID followed by the pound sign.

Confirming Logout

- To log out press 3.
- If you are calling from the home of Michael Scott press 1.
- If this is not the correct client, press any other key.
- (If auto match is not enabled, the caregiver must type the Client ID.)

Mileage

- Enter your mileage followed by the pound sign.
- If you do not have mileage, enter 0 then pound sign.
- Maximum mileage entered can be 999.99

Tasks

- Please indicate that the following tasks were completed by pressing 1.
- Press any other key if task was not completed.
- Was the task assist with eating completed?
- Was the task bath completed?
- Was the task oral care completed?
- Was the task change bed linens completed?
- Was the task clean bathroom completed?
- Was the task oral care completed?

Wellness Questions

- Please answer the following wellness questions.
- Please answer the following questions by pressing 1 for yes or 2 for no.
- Did your client need assistance out of bed?
- What is your client's weight? Enter a value followed by the pound sign.

Voice Signature

- Press 1 and record your full name and today's date. Press any key when finished.
- If the client is available to sign, press 1 and hand the phone to the client. If the client is not available, press the pound sign to end the call.
- Visit login received at (time of login.) visit logout received at (time of logout.) Press 1 to confirm or 2 to deny.
- The service performed was (service code description.) Press 1 to confirm or 2 to deny.
- Press 1 and record your full name and today's date. Press any key when finished.

Completing Logout

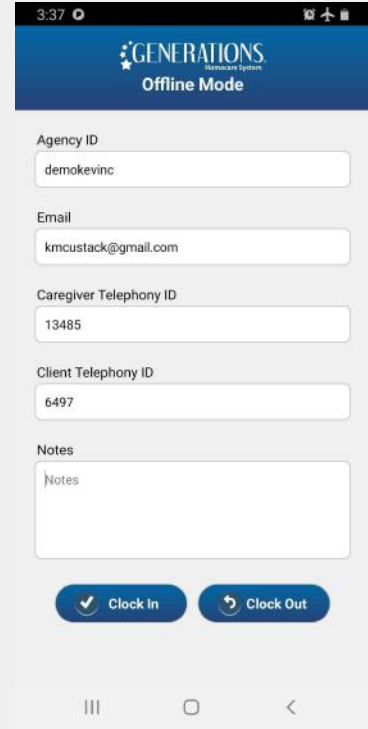
- The current time is (real time.) Your call has been saved. Goodbye.

Telephony - Phone call option

- Approved EVV data collection method by Medicaid/Medicare.
- When the Caregiver doesn't have access to a tablet/smart phone, they can call to clock in and out.
- Caregiver screening, Tasks, Wellness Questions, and Voice signatures can all be captured using Telephony.
- Limit Caregivers to calling from the Client's phone number (must be listed on the Client Personal Data tab).
- Sample script to share with your Caregivers in the Help section. Search by the term 'Script' and you'll find the "EVV Sample Letter to Send Caregivers".

Offline Mode

- No internet or phone to call on? No problem!
- Pulls the GPS location or you can skip the GPS Search function to just collect the time along with the Caregiver and Client ID numbers.
- Once your Caregiver reconnects with their internet connection, the data is sent to Generations.
- Caregivers can still log in on the App or Mobile site after their shift to complete documentation such as Care Notes, Tasks, or collect Electronic/Voice Signatures.
- This method of EVV data collection is also approved by Medicaid/Medicare, but it should only be used when necessary.



The screenshot shows the 'Generations Homecare System' app in 'Offline Mode'. The interface is a mobile app with a blue header. Below the header, there are four text input fields: 'Agency ID' (containing 'demokevinc'), 'Email' (containing 'kmcustack@gmail.com'), 'Caregiver Telephony ID' (containing '13485'), and 'Client Telephony ID' (containing '6497'). Below these fields is a 'Notes' section with a text area. At the bottom, there are two buttons: 'Clock In' (with a checkmark icon) and 'Clock Out' (with a clock icon). The status bar at the top shows the time '3:37' and various icons.

Manual Clock in/out

- The 4th method Generations uses to collect EVV data is a manual clock in/out.
- This method is approved by Medicaid/Medicare to be used in situations where the Caregiver did not have another option. For instance, their mobile device malfunctioned, the service was provided outside the home, or the member was unavailable.
- Most States require an Exception be triggered when a manual clock in/out is entered. Clearing the Exception will require a Reason for it happening and a Resolution of the situation.
 - ◆ Reasons answer the question, "Why is there no electronic login or logout?"
 - ◆ The resolution answers the question, "How did you resolve the reason?" For example, if the caregiver forgot the EVV ID, you maintain written documentation about speaking with the caregiver and client to verify that the caregiver was in fact working with the client.

The screenshot displays the 'Edit EVV Schedule' application window. At the top, a blue header bar contains the title 'Edit EVV Schedule'. Below this, a series of tabs are visible: 'Schedule', 'Scheduled Tasks', 'Wellness', 'Client QA', 'Visit Notes', 'Other Expenses', 'Charting', 'Time/Task Signature', 'Exceptions', and 'Screening'. The 'Exceptions' tab is currently selected, showing a table with columns for 'Exception Code', 'Description', 'Acknowledged', 'Call', 'Reason', and 'Resolution'. A red text label 'Missing Logout' is positioned above the table. A modal dialog box titled 'Add Manual Logout' is open in the foreground. This dialog contains several input fields: 'Call Date' (07/20/2020), 'Call Time' (02:30 PM), 'Call Type' (Logout), 'Reason Code' (Telephony - caregiver forgot), and 'Resolution Code' (Written Documentation). A 'Notes' section at the bottom of the dialog has a text area containing the text: 'Caregiver forgot to clock out. Called the office with the Client to confirm.' The dialog is closed with 'OK' and 'Cancel' buttons.

Caregiver Screening

- Screening allows agencies to establish required questions the caregiver is to complete prior to logging into the scheduled visit.
- Originally designed to fill a need when COVID-19 hit, but this feature can be adapted to work in all kinds of situations.
- If the Caregiver “Fails” a screening, they will be prohibited from clocking in for their shift. The Office can override the overall result from the screening to allow the Caregiver to clock in.
- Screening can be completed using the App/GPS method or the Telephony method.

Edit Schedule

Schedule Edit Task Wellness Questions Client QA Visit Notes Other Expenses Charting Time / Task Signature Exceptions Screening

Caregiver screening result:

Screening Date: 07/20/2020 02:15:56 PM

Screening Result: PASS

Question	Answer	Result	Created	Created by	Updated	Updated by
Do you have any signs or symptoms of a respiratory infection such as fever, cough, shortness of breath or sore throat?	NO	PASS	07/20/2020 02:15:56 PM	Johnson, Donald		
Have you had contact, in the last 14 days, with someone with a confirmed diagnosis of COVID-19, or under investigation for COVID-19, or are ill with respiratory illness?	NO	PASS	07/20/2020 02:15:56 PM	Johnson, Donald		
Have you been in a High Risk area in the last 14 days, meaning any area CDC classifies as Level 3 (i.e., an area with widespread, ongoing community transmission)? As of March 26, 2020, those include but are not limited to Europe, South Korea, Iran, China, and the United Kingdom.	NO	PASS	07/20/2020 02:15:56 PM	Johnson, Donald		
Have you been on a cruise in the last 14 days?	NO	PASS	07/20/2020 02:15:56 PM	Johnson, Donald		

Caregiver Search Delete Schedule Audit Trail Update Cancel

GENERATIONS
Homecare System

Welcome Kevin
Adjust Resolution | Logout

Home Dashboard Clients Caregiver Schedule Timesheets Interfaces EVV Reports Admin Caregiver Search Call Center Help

Admin Company Settings Shift Requests 4 Messages 0 Alerts 17 Notifications 4234 Active Users 1

Company Information Calendar Options Other Options QuickBooks Security EVV Online Forms Web Portal

General Settings Alert Notifications Client Quality Assurance Client EVV Defaults Time / Task Signature Screening

Screening Options










Enable caregiver screening ☒

Hours prior to shift starting that caregiver can complete screening: 24

Failure Message
Please contact the office for further instructions - 989-546-4512.

Screening Questions

Status Type: Active

NEW	Question	Fail Answer	Status
  	Do you have any signs or symptoms of a respiratory infection such as fever, cough, shortness of breath or sore throat?	YES	Active
  	Have you been in a High Risk area in the last 14 days, meaning any area CDC classifies as Level 3 (i.e., an area with widespread, ongoing community transmission)? As of March 26, 2020, those include but are not limited to Europe, South Korea, Iran, China, and the United Kingdom.	YES	Active
  	Have you had contact, in the last 14 days, with someone with a confirmed diagnosis of COVID-19, or under investigation for COVID-19, or are ill with respiratory illness?	YES	Active

Close

Care, Wound, and Visit Notes

→ Care Notes

- ◆ Create any physical form you have, digitally, so the Caregiver can fill it out electronically using the App or Mobile Site.
- ◆ Collect Electronic Signatures.
- ◆ Care Notes can be required on schedules so the Caregiver cannot clock out without filling one out.

→ Wound Notes

- ◆ Wound Notes allow field staff to document wound progression.
- ◆ Caregivers can give the wound a name, write up a description of the wound, notate size, location, condition, stage, and take a picture of the wound to keep track of it's progress.

→ Visit Notes

- ◆ Free-form text box to enter any additional information.
- ◆ Some Agencies have used Visit Notes for additional billable or payable items.

Client: Cabrera, Miguel

Personal Data	Attachments	Charting	Contacts	Custom Fields	Directions/Misc	Exclusions/Preferences	History	Interruptions of Service
Needs	Notes	Plan Of Care (485)	Reminders	Service Orders	Supervisory Visits	Visit History	Wellness	

Care Notes: Caregiver Access
☐ Disabled ☒ Enabled ☐ Required

Wound Notes: Caregiver Access
☐ Disabled ☒ Enabled ☐ Required(Active Wounds)

Client Login - All Notes
☒ No Access ☐ View Approved Notes ☐ View/ Sign Approved Notes

Tasks and Wellness



- Tasks are all the activities the Caregiver needs to complete while they're working with the Client.
 - ◆ When using the App, Caregivers can see a list of the Tasks required on their shifts and check them off as they complete them.
 - ◆ When using Telephony, the Caregivers will be read the list of Tasks when they clock in at the beginning of the shift and then again when they call to clock out. The clock out call is when the Caregiver "marks" the Tasks as completed or not.
 - ◆ Tasks that are marked as "Required" will trigger a Task Alert on the EVV Schedules page if all of them are not completed on a particular shift.
 - ◆ Collect electronic or voice signatures from the Caregiver and/or Client to verify the completed Tasks were actually completed.
 - ◆ Tasks can be used a number of ways, from giving the Caregivers a list of all the things they MIGHT complete during a shift (the Caregiver marks off the ones they completed) to ones that are required by the State and MUST be completed.

- Wellness or Wellness Questions in Generations are used to monitor the general well-being of a Client.
 - ◆ Just like Tasks, Wellness Questions are answered when the Caregiver calls to clock out of their shift. They can also be answered in the App while the shift is being worked.
 - ◆ Wellness Questions are required for a Caregiver to clock out. They can skip a question if they're using Telephony, but that will trigger a Wellness Alert on the EVV Schedules page and it also sends an email and/or text alert to the person or people set up on the EVV->Alert Notifications tab in Company Settings.
 - ◆ Wellness Questions can be yes/no or numeric responses and you can set specific Alert settings for each Client on their Wellness tab. For instance, if you required your Caregiver to take the Client's blood pressure, you can set an Alert if the number is greater than, less than, or in between (both) a specific number.

Electronic and Voice Signatures

→ Electronic or Voice Signatures can be captured for the following areas:

- ◆ Time and Task signature - This signature confirms what the name implies: the time the service was provided and the Tasks completed during that shift.
- ◆ Care Note
- ◆ Wound Note
- ◆ Care Plan Report - Newer feature allowing a signature from a Supervisor
- ◆ Reports

Many Payors are now requiring signatures from the Clients and and Caregivers for payment. Capture this signature electronically so there's no need for paper and all documentation is kept inside Generations for easy access.

Time / Task Signature: Scheduled Times and Completed Tasks

Visit Details:
Client: Cabrera Miguel
Caregiver: Johnson Donald

Time & Completed Tasks:
07/20/2020 02:32 PM - 02:45 PM

No completed task available.

Caregiver Signature

Tap to Sign

Tap to Voice Sign

**CAREGIVER
Not Signed**

Caregiver: Johnson Donald
Signed:

Save

Cancel

Reports



There's a whole section of Reports dedicated to EVV and each one has their merits, but the following are the most widely used Reports:

- Completed Schedules and Tasks (in the Schedules section of the reports)
 - ◆ Tons of filters (Client, Client Status, Location, Client Type, etc.)
 - ◆ Lots of additional info that can be added (Client Address, EVV ID, Total hours, Visit Notes, Wellness Questions, etc.)
 - ◆ Report can be run with handwritten signature lines (up to 2) or the electronic/voice signature captured via EVV.
- Charting Report (in the Schedules section of the reports)
 - ◆ This is your report for Care and Wound Notes.
 - ◆ Tons of filters (All the same as above but also by the specific Care Note format and/or the Approval Status)
- Screening Report (in the Schedules section of the reports)
 - ◆ This report displays all of the Caregiver Screening results.
 - ◆ Filter to see results by the Class/Location to see trends in different offices, by the date range, or just by the screening result so you can concentrate on the people that failed their screening.



Jack, Jill

Dm00live

Completed Tasks By Date

07/01/2020-07/04/2020

Status : A

Client : All Clients

Caregiver : All Caregivers

Case Manager : All Case Managers

Location: All Locations

Client Type : All Client Type

Payor: All Payors

Date	Scheduled Times	Caregiver	Service	EVV Login	EVV Logout
07/02/2020	01:20 AM - 01:22 AM	Flake, Tony		07/02/2020 01:20 AM	07/02/2020 01:22 AM

Signed Time and Tasks:

07/02/2020 01:20 AM - 01:22 AM

Dress/Undress	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Individual's Laundry	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Listing Supplies/Shopping	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Make/Change Bed Linen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Medical Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Medication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Personal Grooming	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Prepare Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Prepare Dinner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Prepare Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
ROM	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Supervision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Transferring	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Turn/Change Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Vital Signs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Work/School/Social	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM
Wound Care	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Anshadh	07/02/2020 03:05 AM

Caregiver Signature

Client Signature

Signature Date : 07/02/2020

Signature Date : 07/02/2020

07/02/2020 01:22 AM - 01:25 AM

Flake, Tony

07/02/2020 01:22 AM 07/02/2020 01:25 AM

Reports - examples



Care Note Report

07/20/2020-07/20/2020

Location : All

Caregiver : All

Client Type : All

Approved Status : All

Client : All

Note Format : All

CaseManager : All

Client Status : A

Client : Cabrera,Miguel

Caregiver : Johnson,Donald

Schedule : 07/20/2020 2:32 pm - 2:45 pm

Note : Skilled Nursing Note 2017

Status : Pending

Category : Vital Signs

Temperature : 98.4

Pulse : 65

Respiration : 15

Caregiver Signature :

Client Signature :

Signed: 07/20/2020 10:31 PM

Signed:



Caregiver Screening Report

DateRange :07/20/2020-07/21/2020

Location: All Locations

Class: All Class

ScheduleID	Caregiver	Client Name	Confirmed	Date	Start Time	End Time	Screening Result	EVV Login	EVV Logout
5938	Johnson, Donald	Cabrera, Miguel		7/20/2020	2:32PM	2:45PM	Pass	07/20/2020 2:32PM	07/20/2020 2:45PM

Tips and Tricks!

- Larger Call in/out windows will help to automatically confirm more shifts. Remember, you can always set your windows to be larger than you tell your Caregivers!
- When you're rolling out EVV to your Caregivers, I always suggest starting with 2 groups - 1 group that listens and does exactly as directed and 1 group that is the opposite. This will help you to see both ends of the spectrum and then you can adjust your settings accordingly.
- Configure your EVV Schedules page using the Column Chooser button to YOUR specific liking. Each User has their own setup so set it up to show everything YOU need to see.
- Use the EVV Audit Trail and EVV Calls to troubleshoot any issues you may come across. These sections record all the data you might need. They're great for looking up what EVV ID the Caregiver entered via Telephony, what time the call actually started/ended, etc.
- Geolocations are KEY if any of your Caregivers will be clocking in/out via the App. 3 ways you can ensure better success:
 - ◆ Look up the address in Google Maps and put the same information into Generations.
 - ◆ Use the "Set Geolocation" button in EVV Schedules.
 - ◆ Office Users can set the Client's Geolocation in the App.
- Confirm your shifts daily!

Home Address Details

Address 1
1107 E. Michigan Street

Address 2
Address 2

City
Mt. Pleasant

State
MI

ZIP
48858

County
Isabella County

Latitude
43.603797800000

Longitude
-84.763259400000

Get Current Location

Call EVV Schedule

Schedule | Scheduled Tasks | Wellness | Client Co. | Visit Notes | Other | Exceptions | Charting | Time/Task Signature | Exceptions | Screening

Calendar, Michigan, 07/28/2020 02:32 PM

Schedule details for schedule (0 steps last updated: 07/28/2020 09:04 PM) (0 steps)

Client/Visit	Client	Visit	Date	Scheduled Start/End (EST)	Confirmed	Working Call	Call In	Call Out
Johnson, Donald	Johnson, Donald	Johnson, Donald	07/28/2020	02:32 PM - 02:47 PM			02:32 PM	02:40 PM

☐ Generate Shift

☒ Match to Schedule To manually assign a call to a schedule click Match to schedule button in the list

☒ Set Geolocation Updates the client's geolocation to coordinates recorded at the visit

☒ Un-match Call Removes the matching call from the schedule

Calls

	Call Time	Roundel Time	Purpose	Client/Visit	Client's Name	Client's Phone	Working Call	Location	Call Sign
	07/28/2020 02:32 PM	07/28/2020 02:32 PM	Visit	Johnson, Donald	Johnson, Donald	5838		02:32 PM	02:40 PM

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Print

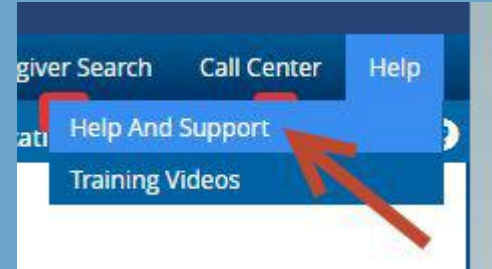
Close

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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 info@homecaresoftware.com

989-546-4512

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