GENERATIONS®
Homecare System

Presenter

Customer Success Manager

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GENERATIONS
Homecare System

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

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Settings

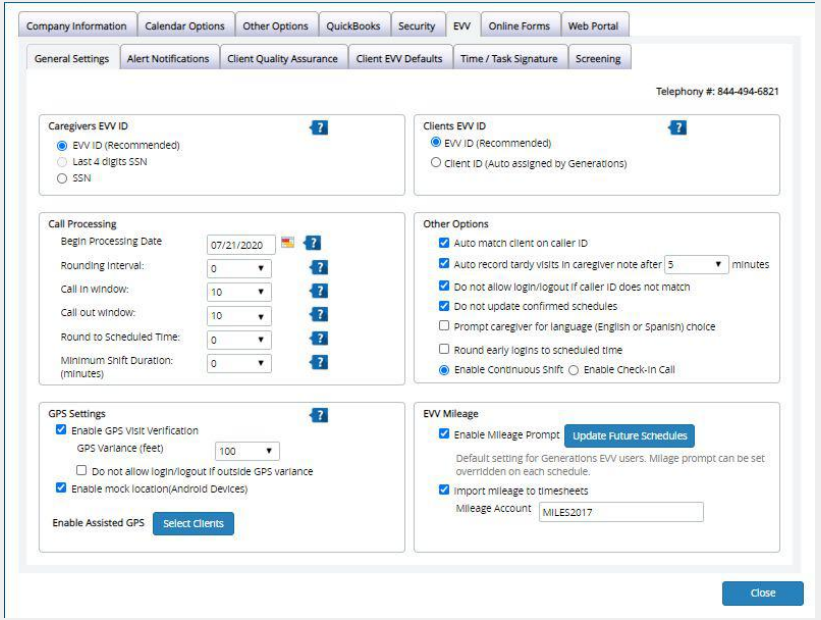
Generations can automatically confirm your shifts for you as long as your Caregivers call within the Call in AND Call out windows. The number in those boxes represents the number of minutes on BOTH sides of the scheduled starting/ending times. For instance:

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).



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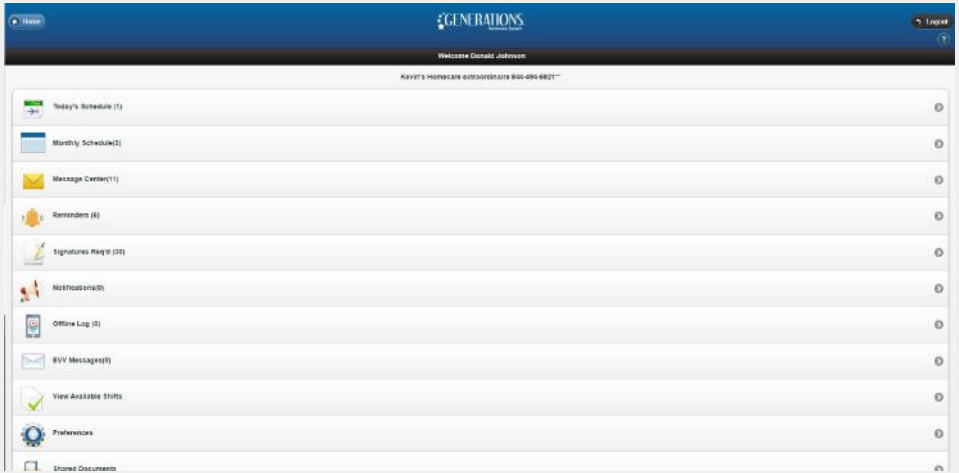
GPS via the Generations App

- ➔ Easy to use and HIPAA compliant!
- ➔ Preferred method of EVV for Medicaid/Medicare.
- ➔ Uses the phone's Location Service features to pinpoint where the Caregiver clocked in and out.
- ➔ Limit the distance from the Client that the Caregiver can clock in/out.
- ➔ IOS and Android versions of the Generations App available.



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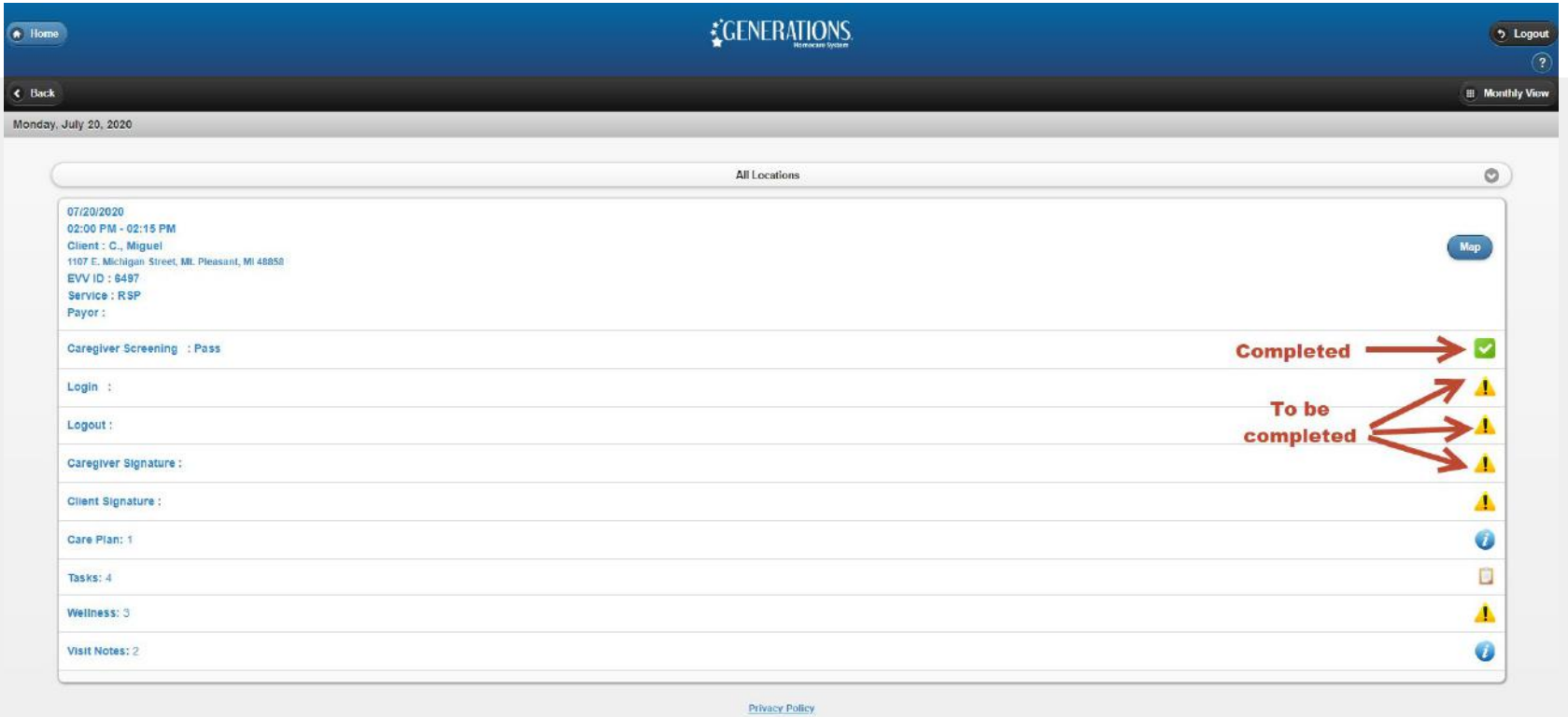

- ➔ Color coded icons to easily be able to tell what has been completed and what hasn't.
- ➔ The Caregiver clicks each item and follows the instructions on the screen. Very easy to use!

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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".

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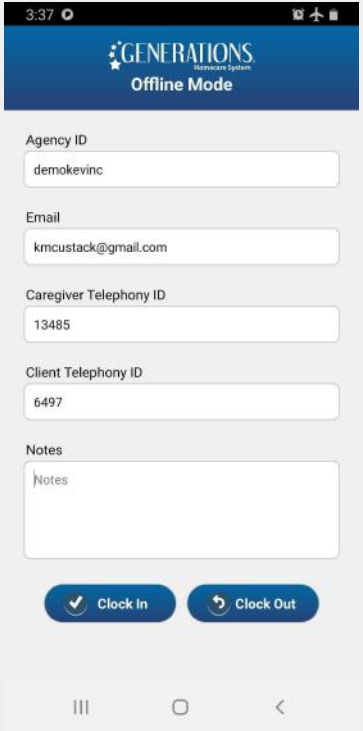
Offline Mode

- ➔ 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.



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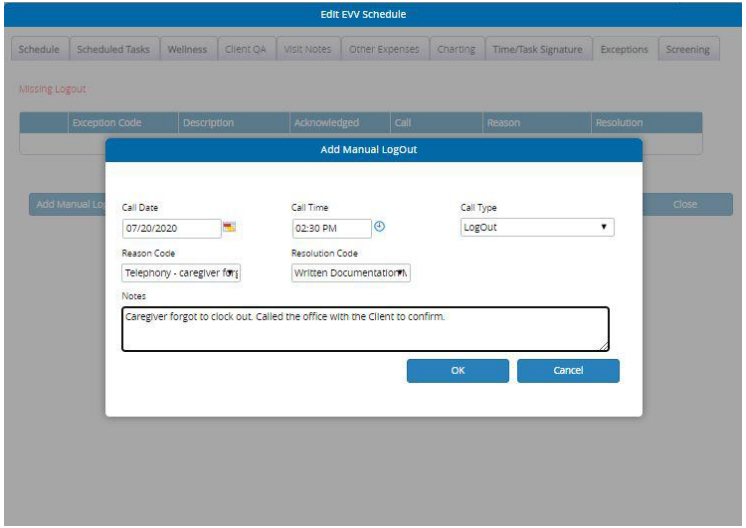
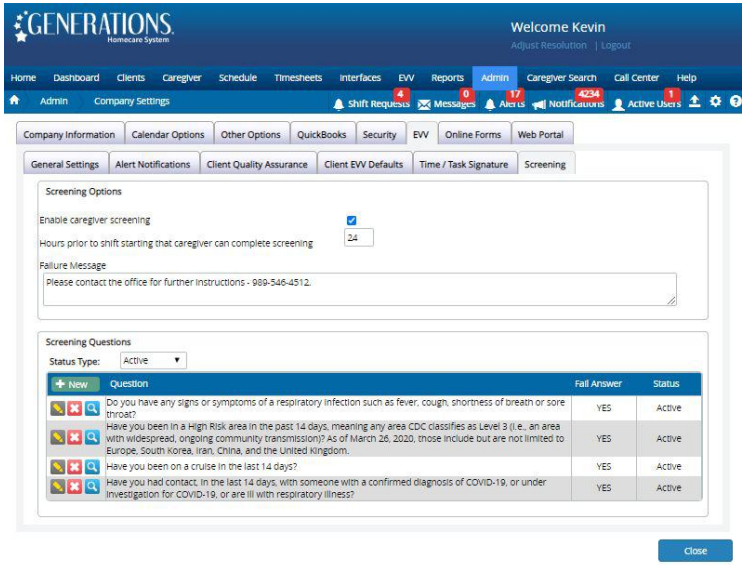
Manual Clock in/out

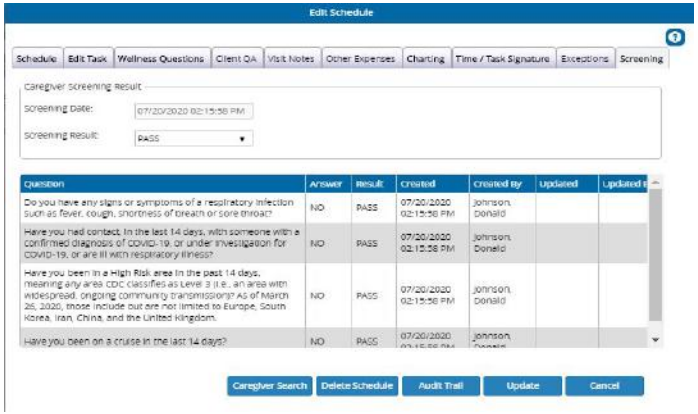
- The 4th method Generations uses to collect EVV data is a manual clock in/out.
- This method is approved by Medicaid/Medicare to be used in situations where the Caregiver did not have another option. For instance, their mobile device malfunctioned, the service was provided outside the home, or the member 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.



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.





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.

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Tasks and Wellness

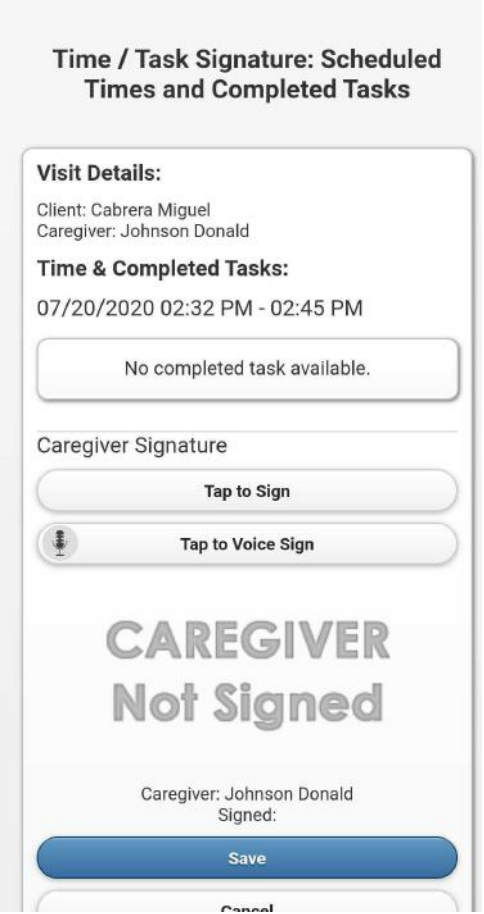
- Tasks are all the activities the Caregiver needs to complete while they're working with the Client.
  - When using the App, Caregivers can see a list of the Tasks required on their shifts and check them off as they complete them.
  - When using Telephony, the Caregivers will be read the list of Tasks 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.



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.

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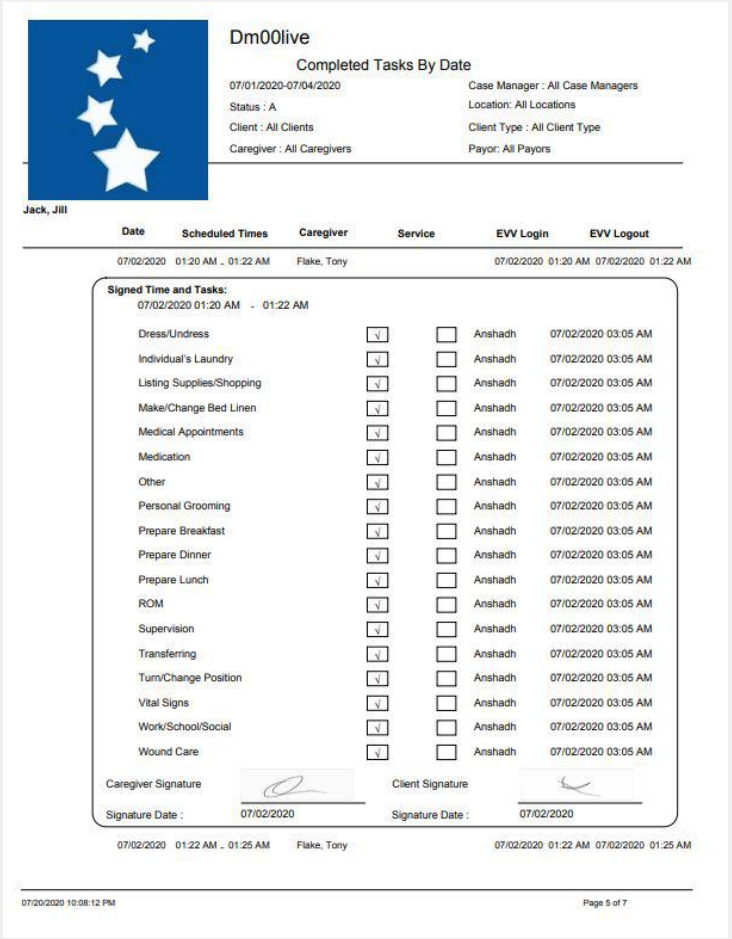
Reports - examples



Dm00live

Completed Tasks By Date

07/01/2020-07/04/2020 | Case Manager : All Case Managers
Status : A | Location: All Locations
Client : All Clients | Client Type : All Client Type
Caregiver : All Caregivers | Payor: All Payors

Jack, Jill

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	√		Anshadh	07/02/2020 03:05 AM
Individual's Laundry	√		Anshadh	07/02/2020 03:05 AM
Listing Supplies/Shopping	√		Anshadh	07/02/2020 03:05 AM
Make/Change Bed Linen	√		Anshadh	07/02/2020 03:05 AM
Medical Appointments	√		Anshadh	07/02/2020 03:05 AM
Medication	√		Anshadh	07/02/2020 03:05 AM
Other	√		Anshadh	07/02/2020 03:05 AM
Personal Grooming	√		Anshadh	07/02/2020 03:05 AM
Prepare Breakfast	√		Anshadh	07/02/2020 03:05 AM
Prepare Dinner	√		Anshadh	07/02/2020 03:05 AM
Prepare Lunch	√		Anshadh	07/02/2020 03:05 AM
ROM	√		Anshadh	07/02/2020 03:05 AM
Supervision	√		Anshadh	07/02/2020 03:05 AM
Transferring	√		Anshadh	07/02/2020 03:05 AM
Turn/Change Position	√		Anshadh	07/02/2020 03:05 AM
Vital Signs	√		Anshadh	07/02/2020 03:05 AM
Work/School/Social	√		Anshadh	07/02/2020 03:05 AM
Wound Care	√		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

07/20/2020 10:08:12 PM Page 5 of 7

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

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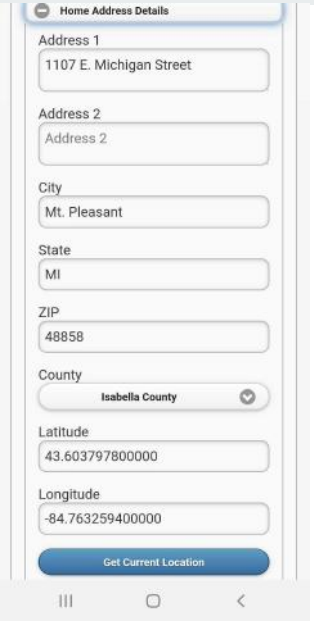
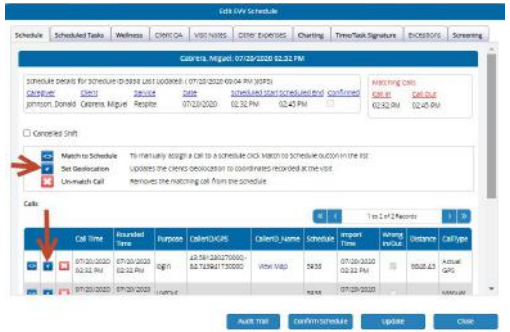
Tips and Tricks!

- ➔ 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!



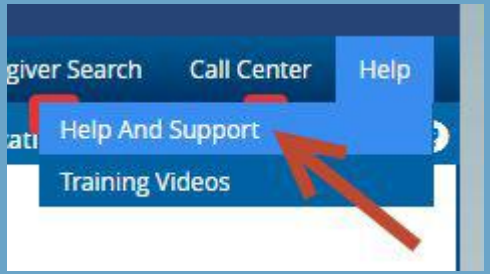


Need assistance?

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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