



GENERATIONS®

Homecare System




Presenter



Customer Success Manager

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EVV - Why didn't that confirm?

- EVV Settings
 - ◆ Clock in/out windows Settings
 - ◆ GPS Variance (Distance) Settings
- EVV Schedules
- 2 Test Scenarios
- Troubleshooting Clock in/out issues
 - ◆ EVV Calls
 - ◆ EVV Audit Trail
- Most frequently used EVV reports
- Summary

EVV Settings - Clock in/out windows

- Found in Admin->Company Settings->EVV Tab
- For Telephony (phone call clock in/out) only the Call in window and Call out window count towards the call confirming.
- Rounding Interval and Round to Schedule Time have nothing to do with the shift confirming.
- Example - Shift start time 9:00 am. End Time 10:00 am.
 - ◆ 10 minute Call in window means the Caregiver has 10 minutes on either side of the start time - 8:50 am - 9:10 am to still be considered “on time”.
 - ◆ 10 minute Call out window means the Caregiver has 10 minutes on either side of the end time - 9:50 am - 10:10 am.
- When setting these windows up, think what amount of time is acceptable where you’d still consider the Caregiver to be ‘On time’. You can always tell them they have 10 minutes when they actually have 15 and to build in a little more leeway.

EDIT - Settings can also be established for which phone number the caregiver is permitted to use for clocking in and out. Use the “Do not allow login/logout if caller ID does not match” option and the Caregiver will be REQUIRED to call from one of the numbers stored on the Client profile.

The screenshot shows the 'EVV' tab in the 'Company Settings' section. The 'Call Processing' section is highlighted in yellow and contains the following settings:

- Begin Processing Date: 09/14/2020
- Rounding Interval: 0
- Call in window: 10
- Call out window: 10
- Round to Scheduled Time: 0
- Minimum Shift Duration (minutes): 0

The 'Other Options' section includes:

- 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

The screenshot shows the 'EVV' tab in the 'Company Settings' section. The 'Other Options' section is highlighted in yellow and contains the following settings:

- 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 Settings - GPS Variance Settings

- Also found in Admin->Company Settings->EVV tab - the GPS Variance settings are right below the Call in/out windows.
- GPS Variance distance options range from 30 to 1000 feet!
- Use the “Do not allow login/logout if outside GPS variance” feature to prevent your Caregivers from clocking in/out from outside the distance.
- For GPS/App clock in/out, BOTH the Call in/out windows AND the GPS Variance distance are considered for confirming shifts. Requiring the GPS clock in/out for a shift to confirm prompts the Agency to review the shift in order to bill and pay for it.
- It is recommended to start with longer distance selected so that more shifts confirm initially. Once your Caregivers are clocking in/out consistently and within the distance, you can start reducing that number. Remember, 100 feet is NOT far at all!
- Most States (Medicaid) have NOT set a maximum allowable distance, but almost all would consider anything under 1000 feet to still be OK. Check with your State Medicaid Agency to be sure of their requirement.

The screenshot displays the 'EVV' settings page in the Generations Homecare System. The page is organized into several sections:

- Call Processing:** Includes fields for 'Begin Processing Date' (09/14/2020), 'Rounding Interval' (0), 'Call in window' (10), 'Call out window' (10), 'Round to scheduled time', and 'Maximum Shift Duration' (0).
- Other Options:** Contains several checkboxes for features like 'Auto match client on caller ID', 'Auto record early 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', and 'Enable continuous shift'.
- GPS Settings (highlighted in yellow):** Features checkboxes for 'Enable GPS verification', 'Enable mock location (Android devices)', and 'Do not allow login/logout if outside GPS variance'. A dropdown menu for 'GPS Variance (feet)' is set to 100. There is a 'Select Clients' button for 'Enable Assisted GPS'.
- EVV Mileage:** Includes checkboxes for 'Enable Mileage Prompt' and 'Import mileage to timesheets', along with a 'Mileage Account' field.

EVV Schedules

- EVV Schedules is your “Dashboard” for keeping an eye on EVV activity.
- Use the Column Chooser button to customize your EVV Schedules. The setup for this page is unique to each User so set it up however makes sense to YOU!
- Tons of different filters so you can look at just the specific groups you want to.

GENERATIONS Homecare System

Welcome Kevin
Adjust Resolution | Logout

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

EVV EVV Schedules

Shift Requests 4 Messages 0 Alerts 11 Notifications 135 Active Users 2

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

09/14/2020-09/14/2020 (All Clients) (All Caregivers) Confirmed All Filters

Auto Refresh every minute Show EVV ID Last Refreshed: 09/14/2020 03:41:56 PM 1 to 1 of 1 Records

Show Color Un-confirmed Confirmed Logged In Available Cancelled

Visit Alert	Task Alert	Confirmed	CG Screening	Client	Caregiver	Schedule Start	Schedule End	Login	Logout	Wrong In	Wrong Out
		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 03:15 PM	09/14/2020 03:30 PM	09/14/2020 03:17 PM	09/14/2020 03:32 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 to 1 of 1 Records

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EVV Schedules - Continued

Generations Homecare System

Welcome Kevin
Adjust Resolution | Logout

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

EVV EVV Schedules

Shift Requests 4 Messages 0 Alerts 11 Notifications 135 Active Users 2

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

09/14/2020-09/14/2020 (All Clients) (All Caregivers) Confirmed All Filters

Auto Refresh every minute Show EVV ID Last Refreshed: 09/14/2020 04:27:47 PM
 Show Color Un-confirmed Confirmed Logged In Available Cancelled

Visit Alert	Task Alert	Confirmed	CG Screening	Client	Caregiver	Schedule Start	Schedule End	Login	Logout	Wrong In	Wrong Out
		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 03:15 PM	09/14/2020 03:30 PM	09/14/2020 03:17 PM	09/14/2020 03:32 PM	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1 to 1 of 1 Records

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→ Section 1



- ◆ Column Chooser
- ◆ Export
- ◆ Font (+)
- ◆ Font (-)
- ◆ Refresh
- ◆ Import - Used to import call data from a 3rd party EVV Vendor. This was set up specifically for Authenticare Users. Authenticare Help - <https://help.idb-sys.com/html5/Authenticare.htm?rhsearch=authenticare&rhsyns=%20>


→ Section 2


- ◆ Date Range
- ◆ Client selection
- ◆ Caregiver selection
- ◆ Confirmed - yes, no, or ALL
- ◆ Filters!
 - Client Type
 - Service
 - Case Manager
 - Call Type
 - Location
 - Schedule Signature
 - Wrong Caller ID/Geolocation


Call settings for Test Scenarios


Call Processing


Begin Processing Date: 09/14/2020  

Rounding Interval: 0 

Call In window: 10 


Call out window: 10 

Round to Scheduled Time: 0 

Minimum Shift Duration: 0 
(minutes)

GPS Settings

Enable GPS Visit Verification

GPS Variance (feet): 1000 

Do not allow login/logout if outside GPS variance

Enable mock location(Android Devices)

Enable Assisted GPS [Select Clients](#)

- Settings:
- ◆ Clock in window = 10 minutes
 - ◆ Clock out window = 10 minutes
 - ◆ GPS Variance distance set to 1000 feet and NOT required to be within that distance to clock in/out.

These 3 settings determine whether or not a shift will automatically confirm by Generations EVV.

Scenario 1

- Shift was scheduled from 3:15 pm until 3:30 pm.
- Caregiver clocked in at 3:17 pm and clocked out at 3:32 pm.
- Distance away from Client's Geolocation:
 - ◆ Clock in = 6,865.13 feet
 - ◆ Clock out = 6,849.58 feet
- Caregiver passed their COVID-19 screening questions and completed all Tasks, Wellness Questions, Care Notes, etc. as required during their shift.
- Why didn't the shift confirm?

Answer: DISTANCE!! The Company Settings are set up to allow clock ins/outs from outside 1000 feet from the Client's Geolocation, but DISTANCE is one of the 3 reasons a shift isn't confirmed via Generations EVV.

The screenshot displays the 'Edit EVV Schedule' interface. At the top, there are tabs for 'Schedule', 'Scheduled Tasks', 'Wellness', 'Client QA', 'Visit Notes', 'Other Expenses', 'Charting', 'Time/Task Signature', 'Exceptions', and 'Screening'. The 'Schedule' tab is active, showing details for Schedule ID: 5953, last updated on 09/14/2020 at 03:32 PM (GPS). A table lists the caregiver (Johnson, Donald), client (Cabrera, Miguel), service (Be Well), date (09/14/2020), scheduled start (03:15 PM), and scheduled end (03:30 PM). The 'Confirmed' checkbox is unchecked. A 'Matching Calls' section shows call in (03:17 PM) and call out (03:32 PM) times. Below this, there are instructions for 'Match to Schedule', 'Set Geolocation', and 'Un-match Call'. A 'Calls' section shows a table with 2 records. The table has columns for Call Time, Rounded Time, Purpose, CallerID/GPS, CallerID_Name, Schedule, Import Time, Wrong In/Out, Distance, and CallType. The first record is for a login at 03:17 PM with a distance of 6865.13 feet. The second record is for a logout at 03:32 PM with a distance of 6849.58 feet. At the bottom, there are buttons for 'Audit Trail', 'Confirm Schedule', 'Update', and 'Close'.

Call Time	Rounded Time	Purpose	CallerID/GPS	CallerID_Name	Schedule	Import Time	Wrong In/Out	Distance	CallType
09/14/2020 03:17 PM	09/14/2020 03:17 PM	login	43.5912284000000-84.7439210800000	View Map	5953	09/14/2020 03:17 PM	<input checked="" type="checkbox"/>	6865.13	Actual GPS
09/14/2020 03:32 PM	09/14/2020 03:32 PM	logout	43.5912635500000-84.7439565900000	View Map	5953	09/14/2020 03:32 PM	<input checked="" type="checkbox"/>	6849.58	Actual GPS

View Map



Edit EVV Schedule

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

Cabrera, Miguel: 09/14/2020 09:15 PM

Schedule Details for Schedule ID:5953 Last Updated: (09/14/2020 03:32 PM)GPS

Caregiver	Client	Service	Date	Scheduled Start	Scheduled End	Confirmed	Matching Calls
Jomson, Donald	Cabrera, Miguel	Be Well	09/14/2020	03:15 PM	03:30 PM	<input type="checkbox"/>	Call In Call Out
				03:17 PM	03:32 PM		

Cancelled Shift

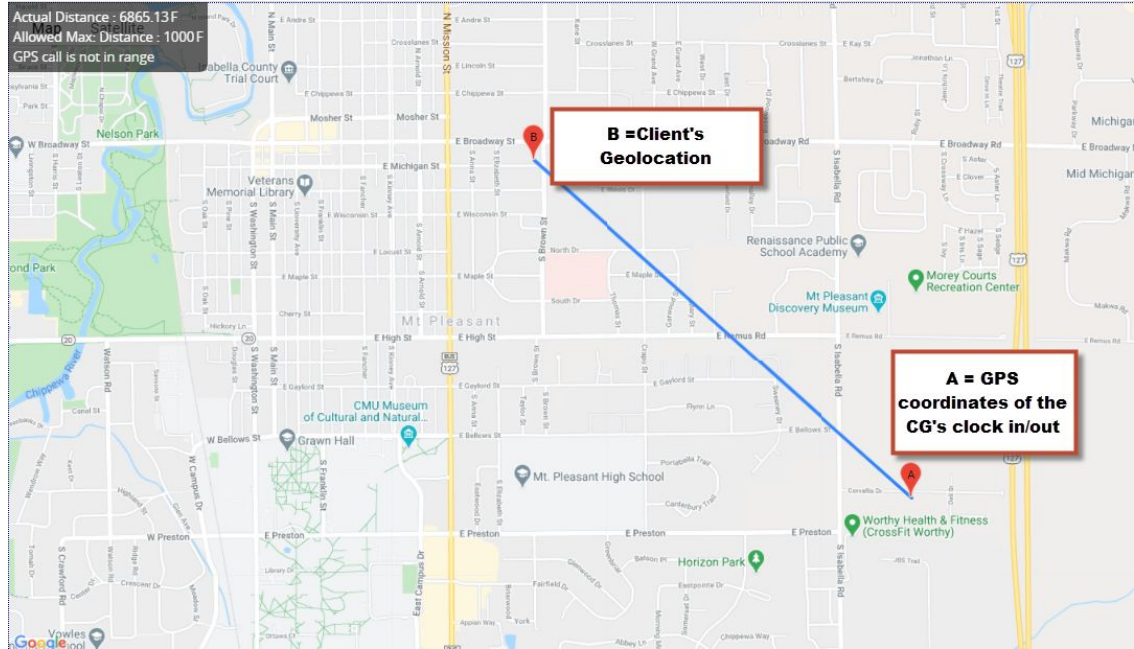
- Match to Schedule To manually assign a call to a schedule click Match to Schedule button in the list
- Set Geolocation Updates the clients Geolocation to coordinates recorded at the visit
- Un-match Call Removes the matching call from the schedule

Calls

1 to 2 of 2 Records

	Call Time	Rounded Time	Purpose	CallerID/GPS	CallerID_Name	Schedule	Import Time	Wrong In/Out	Distance	CallType
	09/14/2020 03:17 PM	09/14/2020 03:17 PM	login	43.5912284000000 - 84.7439210900000	View Map	5953	09/14/2020 03:17 PM	<input type="checkbox"/>	6865.13	Actual GPS
	09/14/2020 03:17 PM	09/14/2020 03:17 PM		43.5912693500000 -			09/14/2020	<input type="checkbox"/>		Actual

Audit Trail Confirm Schedule Update Close



Using the “View Map” button in EVV Schedules, you can see where the Caregiver clocked in/out relative to the Client's Geolocation.
Spot A = GPS coordinates of the Caregiver's clock in/out (as recorded by the Caregiver's device)
Spot B = Client's Geolocation

Scenario 2

- Shift was scheduled from 8:15 pm until 8:30 pm.
- Caregiver clocked in at 8:00 pm and clocked out at 8:34 pm.
- Caregiver called from a number that is NOT on the Client's profile.
- Why didn't the shift confirm?

Answer: Outside the call IN window. The Caregiver called 15 minutes early, but the Call in window is set to 10 minutes.

Some might think the phone number the Caregiver clocked in on might have an impact on the shift confirming, but it does NOT.

If the shift didn't confirm because of time (either the clock in or out window), you will see a sort of "error message" below the call details in EVV Schedules.

Crabera, Miguel: 09/14/2020 08:15 PM

Schedule Details for Schedule ID: 5955

Caregiver	Client	Service	Date	Scheduled Start	Scheduled End	Confirmed	Matching Calls
Johnson, Donald	Cabrera, Miguel	Be Well	09/14/2020	08:15 PM	08:30 PM	<input type="checkbox"/>	Call In: 08:00 PM Call Out: 08:34 PM

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
Un-match Call Removes the matching call from the schedule

Calls

	Call Time	Rounded Time	Purpose	CallerID/GPS	CallerID_Name	Schedule	Import Time	Wrong In/Out	Distance	CallType
<> +	09/14/2020 08:00 PM	09/14/2020 08:00 PM	login	[REDACTED]	KEVIN CUSTAK	5955	09/14/2020 08:00 PM	<input type="checkbox"/>		Call
<> +	09/14/2020 08:34 PM	09/14/2020 08:34 PM	logout	[REDACTED]	KEVIN CUSTAK	5955	09/14/2020 08:34 PM	<input type="checkbox"/>		Call

Audit Trail Confirm Schedule Update Close

Crabera, Miguel: 09/14/2020 08:15 PM

Calls

	Call Time	Rounded Time	Purpose	CallerID/GPS	CallerID_Name	Schedule	Import Time	Wrong In/Out	Distance	CallType
<> +	09/14/2020 08:00 PM	09/14/2020 08:00 PM	login	[REDACTED]	KEVIN CUSTAK	5955	09/14/2020 08:00 PM	<input type="checkbox"/>		Call
<> +	09/14/2020 08:34 PM	09/14/2020 08:34 PM	logout	[REDACTED]	KEVIN CUSTAK	5955	09/14/2020 08:34 PM	<input type="checkbox"/>		Call

Login fails outside the call-in window

Confirmed Start: 08:00 PM
Confirmed End: 08:34 PM
Duration: 00:15 hours

Notes

Audit Trail Confirm Schedule Update Close

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

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

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

09/14/2020-09/14/2020 (All Clients) (All Caregivers) Confirmed Un-Confirmed Filters

Auto Refresh every minute Show EVV ID Last Refreshed: 09/14/2020 09:10:33 PM 1 to 2 of 2 Records

Show Color Un-confirmed Confirmed Logged In Available Cancelled

	Visit Alert	Task Alert	Confirmed	CG Screening	Client	Caregiver	Schedule Start	Schedule End	Login	Logout	Wrong In	Wrong Out
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 03:15 PM	09/14/2020 03:30 PM	09/14/2020 03:17 PM	09/14/2020 03:32 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 08:15 PM	09/14/2020 08:30 PM	09/14/2020 08:00 PM	09/14/2020 08:34 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

1 to 2 of 2 Records

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Wrong in/out

- Telephony clock in/out = Caregiver called from a number that is NOT on the Client's profile = No effect
- GPS Clock in/out = Caregiver clocked in from outside the GPS distance = Shift will not confirm

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

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

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

09/14/2020-09/15/2020 (All Clients) (All Caregivers) Confirmed All Filters

Auto Refresh every minute Show EVV ID Last Refreshed: 09/15/2020 10:33:58 AM 1 to 3 of 3 Records

Show Color Un-confirmed Confirmed Logged In Available Cancelled

	Visit Alert	Task Alert	Confirmed	CG Screening	Client	Caregiver	Schedule Start	Schedule End	Login	Logout	Wrong In	Wrong Out	GPS Login	GPS Logout
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 03:15 PM	09/14/2020 03:30 PM	09/14/2020 03:17 PM	09/14/2020 03:32 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Actual GPS	Actual GPS
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 06:27 PM	09/14/2020 06:41 PM	09/14/2020 06:27 PM	09/14/2020 06:41 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cabrera, Miguel	Johnson, Donald	09/14/2020 08:15 PM	09/14/2020 08:30 PM	09/14/2020 08:00 PM	09/14/2020 08:34 PM	<input type="checkbox"/>	<input type="checkbox"/>		

1 to 3 of 3 Records

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Use the Column Chooser button to add “GPS Login” and “GPS Logout” columns to your EVV Schedules page. This will make it easier to tell if the Wrong in/out actually affected your shift confirming.

Troubleshooting random Clock in/out issues



Have a Caregiver message the Office that they cannot clock in/out, but didn't give you an error message?

If they say the system is down, call your Telephony number yourself to see if the call goes to the system. It should say, "Welcome to Generations Telephony" right away.

If you get a generic explanation, you can find out what happened when they called in:

EVV Calls

Or

EVV Audit Trail

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

◀ 09/14/2020-09/14/2020 ▶ (All Clients) (All Caregivers) Schedules (match) All Filters

Show EVV ID Show All Clients/Caregivers Last Refreshed: 09/14/2020 09:53:23 PM 1 to 6 of 6 Records

Call Duration	CallerID/G...	CallerID Name	Call Time	Call Type	Caregiver	Client	Client Type	LocationID	Matched	Matched ScheduleID	Purpose
0	GPS	View Map	09/14/2020 03:17:56 PM	GPS	Johnson, ...	Cabrera, ...			1	5953	login
0	GPS	View Map	09/14/2020 03:32:13 PM	GPS	Johnson, ...	Cabrera, ...			1	5953	logout
1	██████	KEVIN CUSTAK	09/14/2020 06:27:38 PM	Call	Johnson, ...	Cabrera, ...			1	5954	login
1	██████	KEVIN CUSTAK	09/14/2020 06:41:18 PM	Call	Johnson, ...	Cabrera, ...			1	5954	logout
1	██████	KEVIN CUSTAK	09/14/2020 08:00:35 PM	Call	Johnson, ...	Cabrera, ...			1	5955	login
1	██████	KEVIN CUSTAK	09/14/2020 08:34:06 PM	Call	Johnson, ...	Cabrera, ...			1	5955	logout

1 to 6 of 6 Records

EVV Calls shows:

- Call Duration
- Caller ID name and number for Telephony clock in/out and 'GPS' if the Caregiver used the App
- The Caregiver and Client names associated with the shift the call is for.
- The Schedule ID for the associated shift
- Purpose of the call - clock in or out

You can filter by the date range, the Client, the Caregiver, whether or not the calls match to the schedules, and then under Filters, you can also filter by Client Type, Location, and Call Type to narrow down the results.

EVV Audit Trail



The EVV Audit Trail records every button that was pushed during a Telephony clock in/out so this may be more helpful in troubleshooting login/logout complaints.

EVV Audit Trail:

- Date of the call
- Caller ID Name and Number or Caregiver EVV ID captured via the Generations App
- Duration of the call
- Call Details*
- If the clock in/out is via GPS and the App, there is a GPS column that shows calls that were **INSIDE** the variance and **OUTSIDE** the variance along with the distance from the Client's Geolocation.
- Direction of the call (all Inbound)

*Clicking on the hyperlink under the Call Details column will bring up a pop-up box that will display every question asked and every answer given during that particular call. There is also a result column that will tell if the entry is Valid or Invalid. This is a quick and easy way to tell if an incorrect answer was given.

Export Refresh

09/14/2020-09/14/2020 1 to 7 of 7 Records

Date	From	Caller Name	Minutes	Completed	Call Details	GPS	Direction
09/14/2020 08:34:06 PM	████████	KEVIN CUSTAK	1	Y	CA89a9050e87d8073a57...		Inbound
09/14/2020 08:00:35 PM	████████	KEVIN CUSTAK	1	Y	CAc503e55eca6de21b10...		Inbound
09/14/2020 06:41:18 PM	████████	KEVIN CUSTAK	1	Y	CA50d121bf528cb29165...		Inbound
09/14/2020 06:27:38 PM	████████	KEVIN CUSTAK	1	Y	CA200ee977c991ccc77d...		Inbound
09/14/2020 06:26:13 PM	████████	KEVIN CUSTAK	1	N	CA3b8867a914c149fe84...		Inbound
09/14/2020 03:32:13 PM	13485	Johnson, Donald	1	Y	GPS	Variance(6849.58)	
09/14/2020 03:17:56 PM	13485	Johnson, Donald	1	Y	GPS	Variance(6865.13)	

1 to 7 of 7 Records

Export Refresh

09/14/2020-09/14/2020 1 to 7 of 7 Records

Event Name	Event Time	Data	Result
BeginCall	09/14/2020 06:25:48 PM		
ValidateCaregiver	09/14/2020 06:25:57 PM	13485	Valid
ValidateCallType	09/14/2020 06:26:00 PM	2	Valid
AutoMatchCallerID	09/14/2020 06:26:08 PM	Automatching for single client. Key pressed - 3	Valid
ValidateClient	09/14/2020 06:26:13 PM	6497	Invalid

Date	From	Caller Name	Minutes	Completed	Call Details	GPS	Direction
09/14/2020 08:34:06 PM	13485	Johnson, Donald	1	Y	GPS	Variance(6865.13)	

1 to 7 of 7 Records

Export Refresh

09/14/2020-09/14/2020 1 to 7 of 7 Records

	Latitude	Longitude
Coordinates from GPS call	43.591263550000	-84.743956590000
Coordinates from clients home address	43.603797800000	-84.763259400000

Date	From	Caller Name	Minutes	Completed	Call Details	GPS	Direction
09/14/2020 08:34:06 PM	13485	Johnson, Donald	1	Y	GPS	Variance(6865.13)	

1 to 7 of 7 Records

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

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

Telephony #: 844-494-6821

Caregivers EW ID ?

EW ID (Recommended)

Last 4 digits SSN

SSN

Clients EW ID ?

EW ID (Recommended)

Client ID (Auto assigned by Generations)

Call Processing

Begin Processing Date: 09/16/2020 ?

Rounding Interval: 0 ?

Call in window: 10 ?

Call out window: 10 ?

Round to Scheduled Time: 0 ?

Minimum Shift Duration (minutes): 0 ?

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

If you have the “Do not allow login/logout if caller ID does not match” option enabled and your Caregiver tries to clock in from a number that is not stored on the Client profile, they will be told, “This call is not placed from a known customer phone number. Please contact your office. Goodbye.” That setting and the use of a different phone than what’s on the Client’s profile will prevent the Caregiver from clocking in or out.

Most frequently used EVV Reports



- Reports->EVV
 - ◆ EVV Schedules

- Reports->Schedules
 - ◆ Completed Schedules and Tasks
 - ◆ Screening Report (Caregiver Screening results)
 - ◆ Scheduled Task Report
 - ◆ Wellness Report
 - ◆ Charting Report

OR

- EVV->EVV Schedules
 - ◆ Use Column Chooser to customize the layout and then use the Export button to produce an Excel file.

Summary

Display Name | Added | Changed | Deleted | Old Value | New Value | Updated Time | User

Display Name	Added	Changed	Deleted	Old Value	New Value	Updated Time	User
Schedule Expense: MILES2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Total Units: 9.00, Cost Per Unit: 0.54, Total Cost: 4.92, Is Billable: Yes, Is Payable: Yes, Payor ID: 0	09/14/2020 08:34 PM	Telephony
Exception : Un-matched client ID/ phone - Acknowledged	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No	09/14/2020 08:34 PM	Telephony
Exception : Un-matched client ID/ phone - ScheduleE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		95	09/14/2020 08:34 PM	Telephony

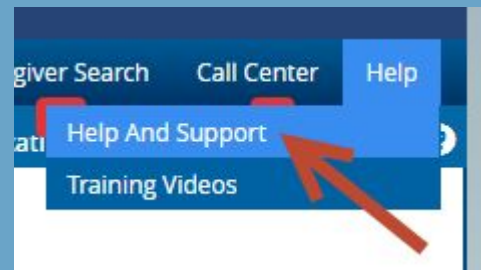
- For Generations EVV to confirm shifts automatically...
 - ◆ Telephony calls are affected by the Clock in and Clock out windows.
 - ◆ GPS calls are affected by the Clock in and Clock out windows along with the GPS variance distance.
- Use EVV Schedules to monitor your EVV activity.
 - ◆ Use Column Chooser to customize YOUR setup!
- Use EVV Audit Trail and EVV Calls to troubleshoot many EVV situations.
- Completed Schedules and Tasks is the most widely used EVV Report.
- Bonus - Use the Schedule Audit Trail (either on the Calendar or in EVV Schedules) to see changes with the shift, i.e. Start Time, End Time, Tasks added, etc.

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





[HomecareSoftware.com](https://www.HomecareSoftware.com) | Reach us via LiveChat

 info@homecaresoftware.com

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