





Presenter



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EVV - Tasks and Wellness Questions



→ Tasks

- ◆ What are they and how can they be used?
- ◆ Task Categories and Master List
- ◆ Use the Care Plan for easier application of Tasks!
- ◆ Scheduling with Tasks
- ◆ How can you keep track that they're being completed?

→ Wellness Questions

- ◆ What are they?
- ◆ Use the Wellness Tab for easier application of Wellness Questions!
- ◆ Scheduling with Wellness Questions
- ◆ Wellness Alerts and Visibility

→ Reports for Tasks and Wellness Questions

Tasks - What are they and how can they be used?

- Tasks are specific functions performed by a Caregiver when working with a Client.
 - ◆ Client requested
 - ◆ State required (Ex. DMAS90 - Virginia)
 - ◆ MCO/Payor required
- Pick and choose which shifts have Tasks to be completed or apply them to ALL shifts.
- Apply just the specific Tasks that must be completed or apply ALL Tasks and have your Caregivers check off the ones they completed.
- Collect electronic or voice signatures from the Caregiver or the Caregiver and the Client.
- Tasks do not require EVV (Electronic/Voice Signatures DO require EVV)
- Marking a Task as “Required” will trigger an alert on the EVV Schedules page if that particular Task wasn’t completed.

Add Schedule

Schedule | Scheduled Tasks | Wellness Questions | Notes | Other Expenses | Time / Task Signature

Assign Task	Task Name	Frequency	Completed	Last Updated	Updated By	Required
<input checked="" type="checkbox"/>	Administration of Medications		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Appointment		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Assist with Bathing or Shower		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bathroom - Clean Mirror		<input type="checkbox"/>			<input type="checkbox"/>
	Bathroom - Clean					

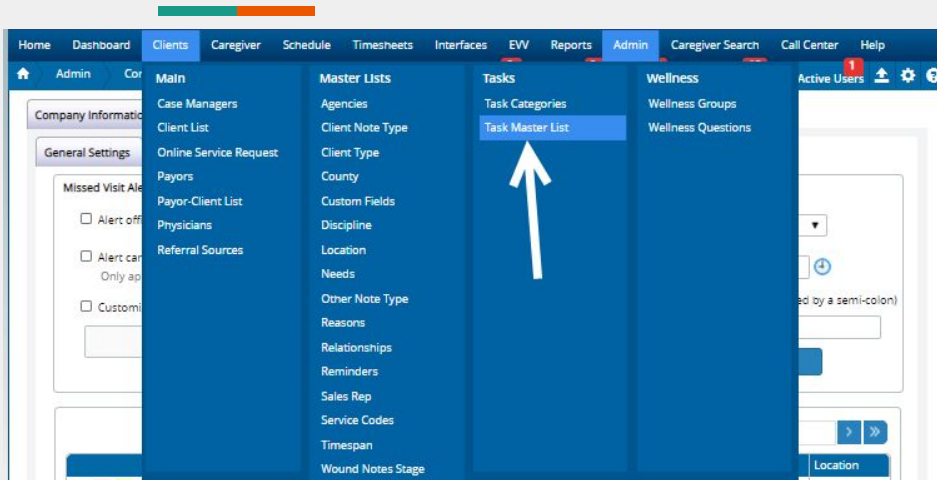
Plan of Care List

To assign tasks from a current plan of care click the icon under Copy Task.

Copy Task	Authorized Start Date	Authorized End Date	Name
<input type="checkbox"/>	10/22/2020	12/20/2020	

Add Cancel

Task Categories and Task Master List



- Task Categories allow you to group your Tasks.
- Task Master List is the actual list of those Tasks.

Task	Category	Status
Administration of Medications	Skilled Nursing	A
Appointment	Shopping/Errands/Transportation	A
Assist with Bathing or Shower	Personal Care	A
Bathroom - Clean Mirror	Home Care	A
Bathroom - Clean Surfaces	Home Care	A
Bathroom - Clean Toilet	Home Care	A
Bathroom - Organize and straighten shelves	Home Care	A
Bathroom - Spray and wipe rinse tub cushion	Home Care	A
Bedroom - Change bed linens	Home Care	A
Bedroom - Make bed	Home Care	A
Catheter 1	Skilled Nursing	A
Catheter 2	Skilled Nursing	A
Catheter 3	Skilled Nursing	A

Description
Assessment
Daily Activities
DMA590
Food & Fluids
Home Care
Indiana Medicaid
Other Services

Tasks - Use the Care Plan!

- You can pick each Task every time you create schedules OR you can use the Care Plan to pick the standard Tasks to streamline your scheduling process!
- Add Frequency and Notes that your Caregivers will be able to see on the App (1).
- Mark the Task as REQUIRED, which will trigger an Alert on the EVV Schedules page if the Task isn't completed (2).
- Require Tasks on all newly created schedules to ensure there's always Tasks applied (3).
- You can also "Update Future Schedules" right from the Tasks tab inside the Care Plan. This is a quick way to apply Tasks to already built schedules (4).

Client: Fudd, Elmer

485 Start* Care Plan CMS-487* Diagnosis* DME/Safety/Nutritional/Allergies* Goals*

Limitations/Activities/Mental Status/Prognosis* Medications* Orders* Physicians* Special Instructions Tasks

Edit Category Edit Tasks Task List Report

☐ Include on the Care Plan Report ☒ Require tasks on new schedules 3 Save Tasks Update Future Schedules 4

1 to 10 of 10 Records

☐ Select All

Category			
Assessment			
	Tasks	Frequency & Notes	Required
<input type="checkbox"/>	Conduct Assessment	1	2 <input type="checkbox"/>
Daily Activities			
	Tasks	Frequency & Notes	Required
<input type="checkbox"/>	Complete all tasks for client		<input type="checkbox"/>
Food & Fluids			
	Tasks	Frequency & Notes	Required
<input type="checkbox"/>	Encourage fluids		<input type="checkbox"/>
<input type="checkbox"/>	Limit fluids		<input type="checkbox"/>
<input type="checkbox"/>	Prepare & serve dinner		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Prepare & serve lunch	Before 2 pm	<input type="checkbox"/>

Scheduling with Tasks!

- When building your schedules, there are a couple of ways to apply the Tasks
 - ◆ Manually select each Task
 - ◆ Copy the Tasks from the Plan of Care
- If selected manually, the Tasks will automatically have the “Required” box checked.
 - ◆ “Required” triggers an Alert on the EVV Schedules page when that particular Task wasn’t completed.
- If selecting the “Copy Task” button, that will copy the Tasks from that particular Plan of Care
 - ◆ If you have specific Tasks for specific times or days, name your Care Plan accordingly so you know which Tasks from which Care Plan to copy.

Add Schedule

Schedule
Scheduled Tasks
Wellness Questions
Notes
Other Expenses
Time / Task Signature

?

Assign Task	Task Name	Frequency	Completed	Last Updated	Updated By	Required
<input checked="" type="checkbox"/>	Administration of Medications		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Appointment		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Assist with Bathing or Shower		<input type="checkbox"/>			<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bathroom - Clean Mirror		<input type="checkbox"/>			<input type="checkbox"/>
<input type="checkbox"/>	Bathroom - Clean		<input type="checkbox"/>			<input type="checkbox"/>

Plan of Care List

To assign tasks from a current plan of care click the icon under Copy Task.

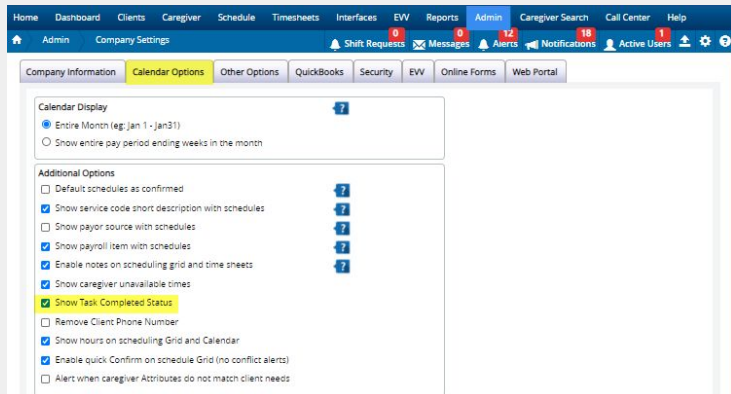
Copy Task	Authorized Start Date	Authorized End Date	Name
<input checked="" type="checkbox"/>	10/22/2020	12/20/2020	

OR
Copy Tasks from the Plan of Care

Add
Cancel

How do I keep track of the completed Tasks?

- Enable “Show Task Completed Status” in Admin->Company Settings->Calendar Options tab to display a checkbox on the Calendar.
 - ◆ The checkbox on the Calendar will only be checked if the Caregiver completed ALL of the Tasks that were applied to that shift.
- On the EVV Schedules page, the Task Alert column is standard. If a red triangle appears, a REQUIRED Task wasn't completed.
 - ◆ If the Caregiver completed the Tasks, but forgot to check them off, the Office Staff can go into that shift and mark each Task as Completed. That will remove the red triangle in the Task Alert column.



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

Admin Company Settings

Calendar Options

Calendar Display

☒ Entire Month (eg: Jan 1 - Jan 31)

☐ Show entire pay period ending weeks in the month

Additional Options

☐ Default schedules as confirmed

☒ Show service code short description with schedules

☐ Show payroll source with schedules

☒ Show payroll item with schedules

☒ Enable notes on scheduling grid and time sheets

☒ Show caregiver unavailable times

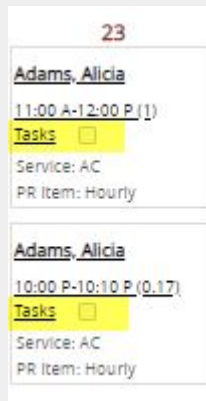
☒ Show Task Completed Status

☐ Remove Client Phone Number

☒ Show hours on scheduling Grid and Calendar

☒ Enable quick Confirm on schedule Grid (no conflict alerts)

☐ Alert when caregiver Attributes do not match client needs



23

Adams, Alicia

11:00 A-12:00 P (1)

Tasks ☐

Service: AC

PR Item: Hourly

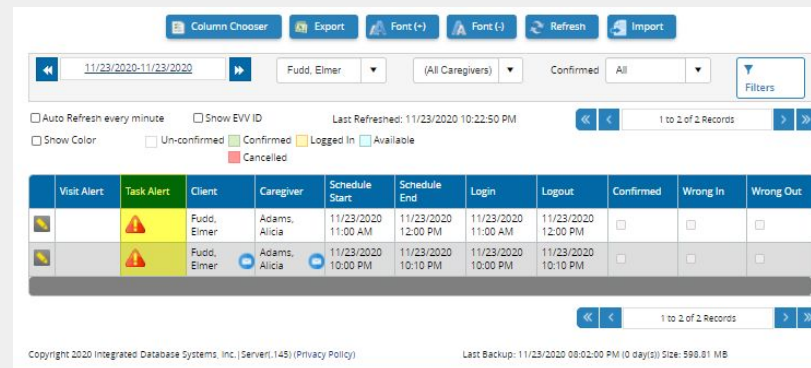
Adams, Alicia

10:00 P-10:10 P (0,17)

Tasks ☐

Service: AC

PR Item: Hourly



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

11/23/2020-11/23/2020 Fudd, Elmer (All Caregivers) Confirmed All Filters

☐ Auto Refresh every minute ☐ Show EVV ID Last Refreshed: 11/23/2020 10:22:50 PM

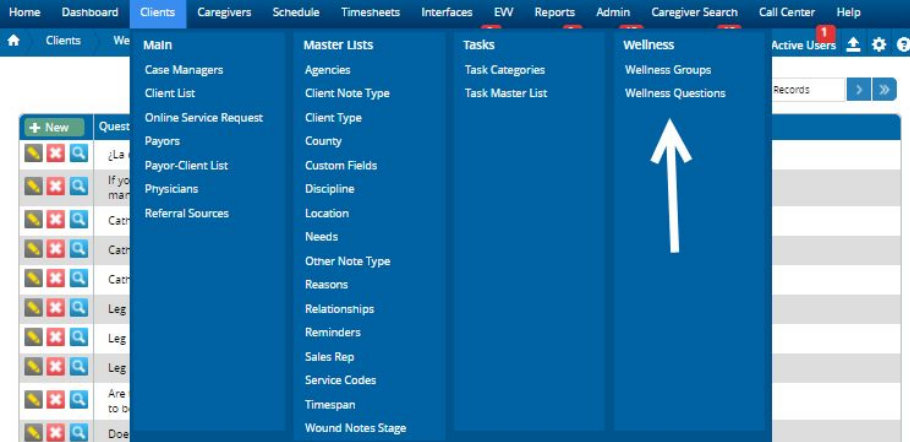
☐ Show Color: ☐ Un-confirmed ☒ Confirmed ☐ Logged In ☐ Available

☐ Cancelled

Visit Alert	Task Alert	Client	Caregiver	Schedule Start	Schedule End	Login	Logout	Confirmed	Wrong In	Wrong Out
		Fudd, Elmer	Adams, Alicia	11/23/2020 11:00 AM	11/23/2020 12:00 PM	11/23/2020 11:00 AM	11/23/2020 12:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		Fudd, Elmer	Adams, Alicia	11/23/2020 10:00 PM	11/23/2020 10:10 PM	11/23/2020 10:00 PM	11/23/2020 10:10 PM	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Last Backup: 11/23/2020 08:02:00 PM (0 days) Size: 599.01 MB



Wellness Questions - What are they?

- Questions asked about the general well-being of the Client.
 - ◆ If the Caregiver uses the Telephony option (phone call) for clocking in/out, they will hear the Wellness Question read off at the end of the shift.
 - ◆ Set up your Wellness Questions to have yes/no or numeric answers.
 - ◆ Wellness Groups allow you to group your Wellness Questions, just like Task Categories do for Tasks.
 - ◆ Set up Wellness Groups and Questions under the Clients drop down, just to the right of the Task Categories and Master List.
- Wellness Questions are REQUIRED and MUST be answered before the Caregiver can clock out.

Status: Active Group Name: All 1 to 19 of 19 Records				
Question	Group Name	Question Type	Status	
¿La clientela tiene buen apetito?	Caregiver Lunch and Breaks	Yes/No	A	
If you took a lunch break, for how many minutes?	Caregiver Lunch and Breaks	Numeric	A	
Cathe Proc - CC's	Cathe Proc	Numeric	A	
Cathe Proc Description: Clear	Cathe Proc	Yes/No	A	
Cathe Proc Description: Cloudy	Cathe Proc	Yes/No	A	
Leg Bag CC's	Cathe Proc	Numeric	A	
Leg Bag Description: Clear	Cathe Proc	Yes/No	A	
Leg Bag Description: Cloudy	Cathe Proc	Yes/No	A	
Are there any urgent items that need to be reviewed in your Visit Note?	General Wellbeing	Yes/No	A	
Does the client have a good appetite?	General Wellbeing	Yes/No	A	
Is the client experiencing any depression?	General Wellbeing	Yes/No	A	
Is the client sleeping well?	General Wellbeing	Yes/No	A	
Rate the mood of the client today.	General Wellbeing	Numeric	A	
Did you remind client to take their medications?	Nursing and Medical	Yes/No	A	
Is client experiencing any shortness of breath?	Nursing and Medical	Yes/No	A	

Wellness Questions - Use the Wellness Tab!

- On the Wellness Tab on each Client's profile, you can pick and choose which Wellness Questions are important for that particular Client (1).
- Set an Alert threshold for when you want to be alerted (2).
 - ◆ For example, if you want an Alert for when the Client's blood pressure is above or below a certain level.
- Set up the email addresses of the people that want to be alerted (3).
- Use the Update Future Schedules button to apply the selected Wellness Questions on this page to all future schedules that are already created (4).

Edit Question

Question Group:

Alert When Answer
☐ Yes
☐ No

Question:

Save

Close

Edit Question

Question Group:

Alert When Answer
☐ Less Than
☐ Greater Than

Question:

Save

Close

Client: Fudd, Elmer

Personal Data	Attachments	Charting	Contacts	Custom Fields	Directions/Misc	Exclusions/Preferences	History	Interruptions of Service
Needs	Notes	Plan Of Care (405)	Reminders	Service Orders	Supervisory Visits	Visit History	Wellness	

Show Alert Configuration

Update Future Schedules

Wellness Questions Master List Wellness Groups Master List Questions Group Filter

Refresh

Save

To update schedules with the current questions click the Update Future Schedules button.

Group				
Caregiver Lunch and Breaks				
		Question	Type	Alert
<input type="checkbox"/>		¿La clienta tiene buen apetito?	Yes/No	
<input type="checkbox"/>		If you took a lunch break, for how many minutes?	Numeric	
Cathie Proc				
		Question	Type	Alert
<input type="checkbox"/>		Cathie Proc - CC's	Numeric	
<input type="checkbox"/>		Cathie Proc Description: Clear	Yes/No	
<input type="checkbox"/>		Cathie Proc Description: Cloudy	Yes/No	
<input type="checkbox"/>		Leg Bag CC's	Numeric	
<input type="checkbox"/>		Leg Bag Description: Clear	Yes/No	
<input type="checkbox"/>		Leg Bag Description: Cloudy	Yes/No	

Scheduling with Wellness Questions!

- Just like with Tasks, make sure you select your Wellness Questions when you set up your schedule.
- Wellness Questions can also be manually selected or copied from the Client's Wellness Settings/Tab.
 - ◆ Set up your Client's Wellness Tab to streamline your scheduling process!
 - ◆ Wellness Questions must be set up on the Client's Wellness Tab if you want Alerts for specific answers.

Add Schedules

Schedule | Scheduled Tasks | **Wellness Questions** | Notes | Other Expenses | Time / Task Signature

Assign Question	Question	Last Updated	Updated By
<input type="checkbox"/>	¿La clienta tiene buen apetito?		
<input type="checkbox"/>	Are there any urgent items that need to be reviewed in your Visit Note?		
<input type="checkbox"/>	Cath Proc - CC's		
<input type="checkbox"/>	Cath Proc Description: Clear		
<input type="checkbox"/>	Cath Proc Description: Cloudy		
<input type="checkbox"/>	Did you remind client to take their medications?		
<input type="checkbox"/>	Does the client have a good appetite?		
<input type="checkbox"/>	If you took a lunch break, for how many minutes?		
<input type="checkbox"/>	Is client experiencing any shortness of breath?		
<input type="checkbox"/>	Is the client experiencing any depression?		
<input type="checkbox"/>	Is the client experiencing any dizziness?		
<input type="checkbox"/>	Is the client sleeping well?		
<input type="checkbox"/>	Let Bas CC's		

Pick each Wellness Question

OR Copy from the Client's Wellness Tab

Copy from client wellness settings

Add **Cancel**

Wellness Alerts and visibility


- If you set up Alerts for specific answers and entered email addresses for those Alerts on the Client's Wellness Tab, emails will be sent when an answer crosses the Alert threshold.
- If you didn't set up email addresses to be Alerted, you can still use the EVV Schedules page to view those Wellness Alerts
 - ◆ Use the Column Chooser button at the top to add the "Wellness Alert" column so you can see if any of the answers crossed the Alert threshold.
 - ◆ Click on the yellow pencil to the left of the shift and then click on the Wellness tab to view the Alert.

The screenshot shows the EVV Schedules interface. At the top, there's a navigation bar with 'EVV' and 'EVV Schedules'. Below it, a toolbar contains buttons for 'Column Chooser', 'Export', 'Font (+)', 'Font (-)', 'Refresh', and 'Import'. The 'Column Chooser' button is highlighted with a yellow box and a red arrow pointing to the 'Wellness Alert' column in the schedule table below. The table has columns for Visit Alert, Task Alert, Wellness Alert, Client, Caregiver, Schedule Start, Schedule End, Login, Logout, Confirmed, Wrong In, and Wrong Out. The first row shows a schedule for Fudd, Elmer on 11/23/2020 from 11:00 AM to 12:00 PM. The second row shows a schedule for Fudd, Elmer on 11/23/2020 from 10:00 PM to 10:10 PM. The 'Wellness Alert' column in the second row contains a yellow pencil icon.

The screenshot shows the 'Wellness' tab in the EVV Schedules interface. The table has columns for Assign Question, Question, Answer, Alert Range, Alerted, and Updated By. The 'Alerted' column is highlighted with a red circle. The table contains three rows of data:

Assign Question	Question	Answer	Alert Range	Alerted	Updated By
<input checked="" type="checkbox"/>	Blood pressure diastolic reading	56	>1		Telephony
<input checked="" type="checkbox"/>	Blood pressure systolic reading	56	>1		Telephony
<input checked="" type="checkbox"/>	Did client do PT exercises today?	No	No		Telephony

Reports for Tasks and Wellness Questions

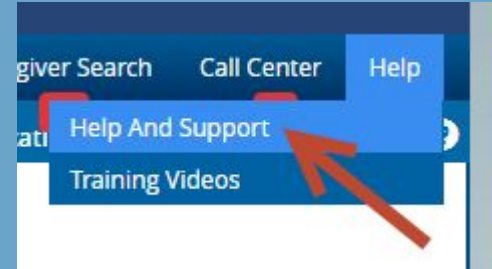
- 
- Wellness Report - Under Reports->Schedules - This report will list all or specific Wellness Questions associated with schedules, grouped by Clients and Dates. Additional Filters for Client Type, Wellness Groups, Case Manager, and Alert Status.
 - Plan of Care - Tasks (7 day) - Under Reports->Clients - This report will give a 1 to 4 week summary report based on the Tasks selected on the Plan of Care for all or certain Clients.
 - Scheduled Task Report - Under Reports->Schedules - This report will give a listing of schedules with Tasks to be completed grouped by Client or Caregiver. There are a lot of additional filters on this report, such as Client Type, Case Manager, or Class. It also has some additional features/data that can be included when run, like a signature line, option to include the Client's address, and you can include the Service Description.
 - Completed Schedules and Tasks Report - Under Reports->Schedules - This is the #1 report for Tasks or Tasks and Wellness Questions. There are a ton of different filters, such as Client Type, Location, Case Manager and Payor. There are also a LOT of options that can be included on the report, like Wellness Questions, EVV Login/Logout, Visit Notes, and up to 3 Signature lines (either handwritten or electronic/voice signatures captured by EVV).

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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