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Homecare System

Presenter

Customer Success Manager

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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

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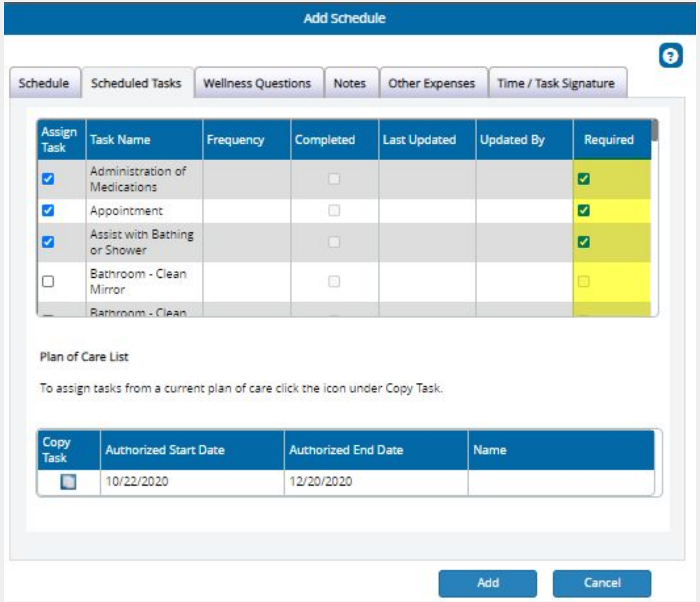
Tasks - What are they and how can they be used?

- ➔ 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.



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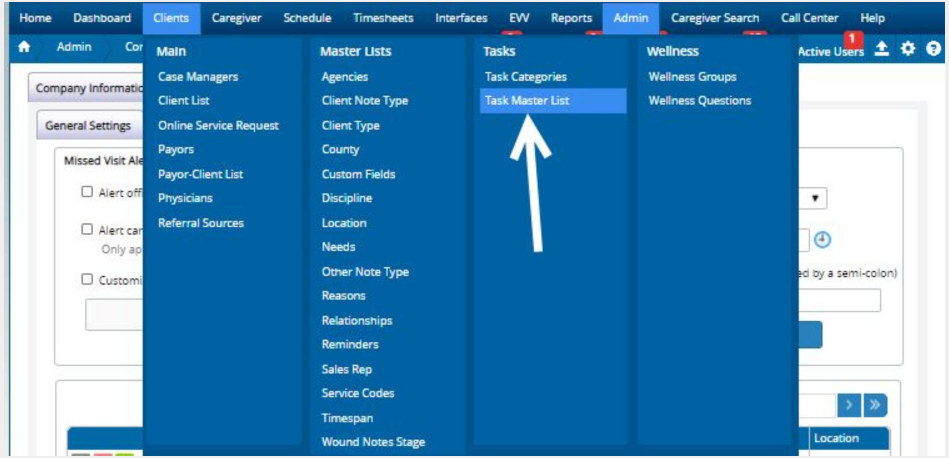
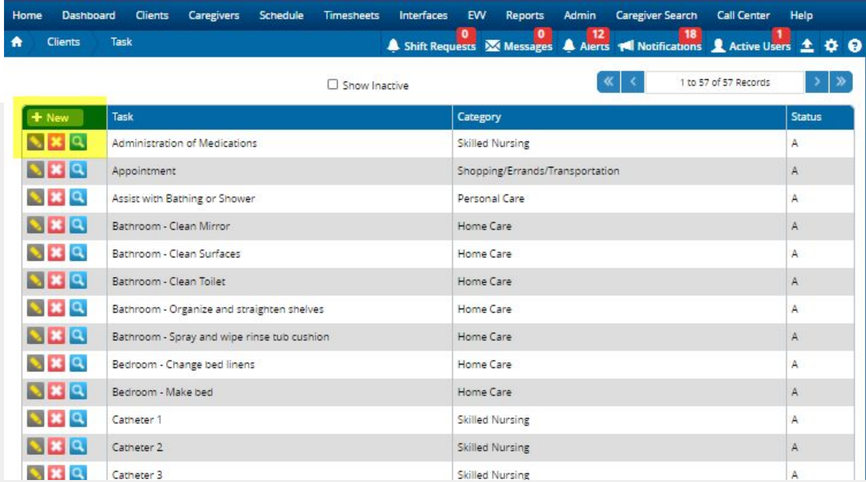
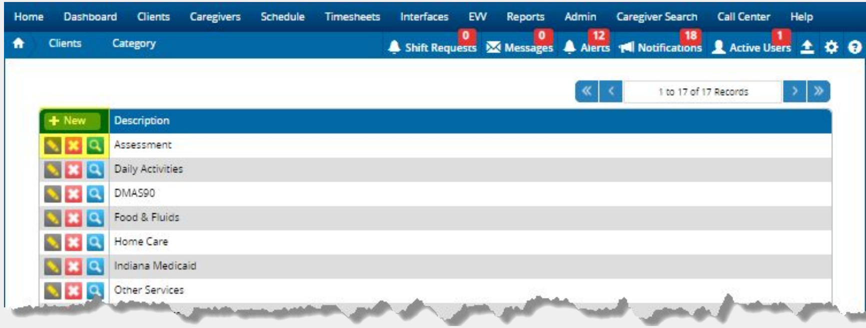
Task Categories and Task Master List







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

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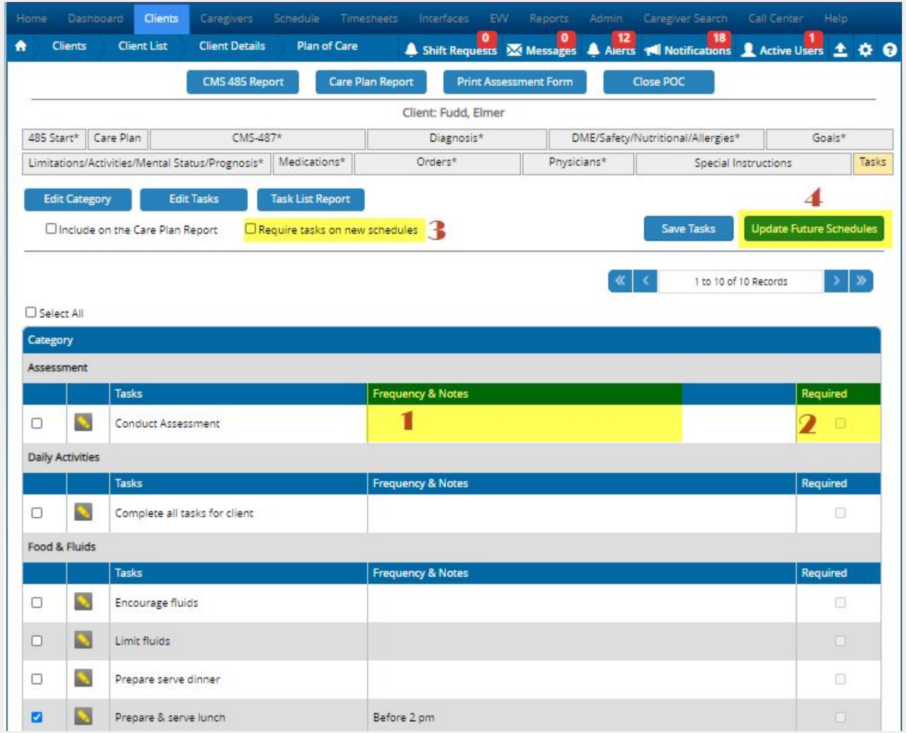
Tasks - Use the Care Plan!



- ➔ 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).

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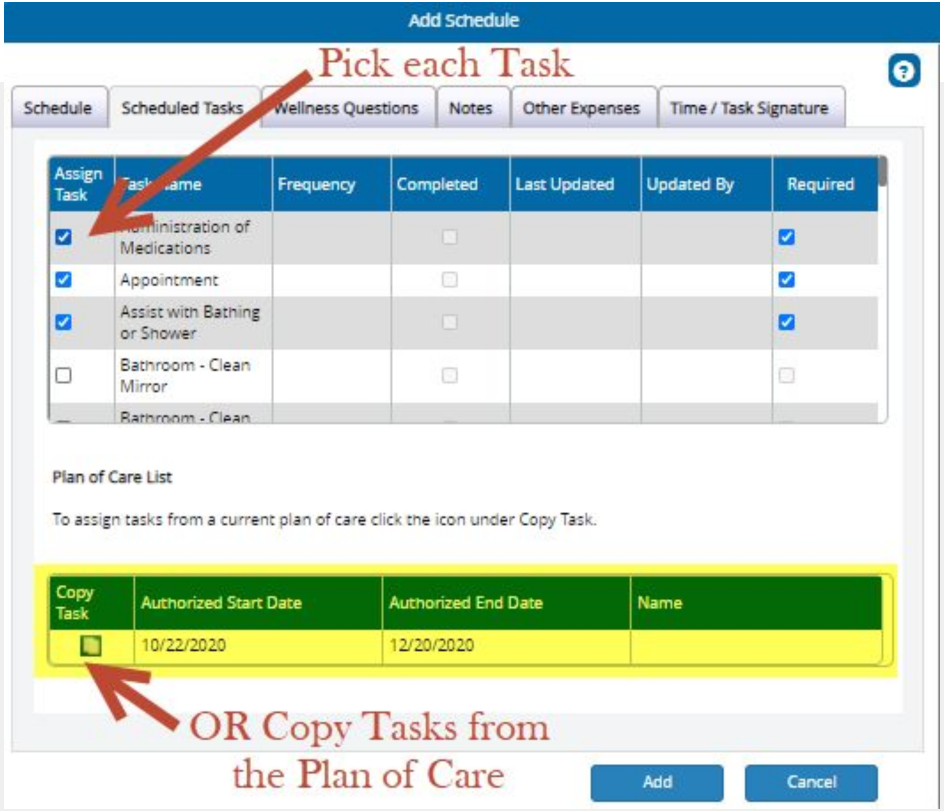
Scheduling with Tasks!

- ➔ 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.



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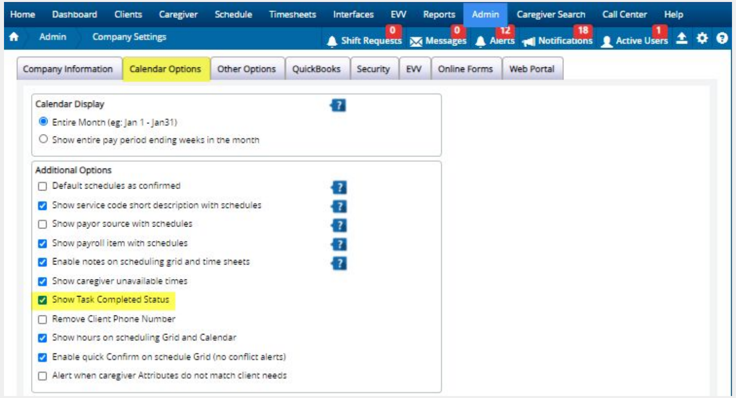
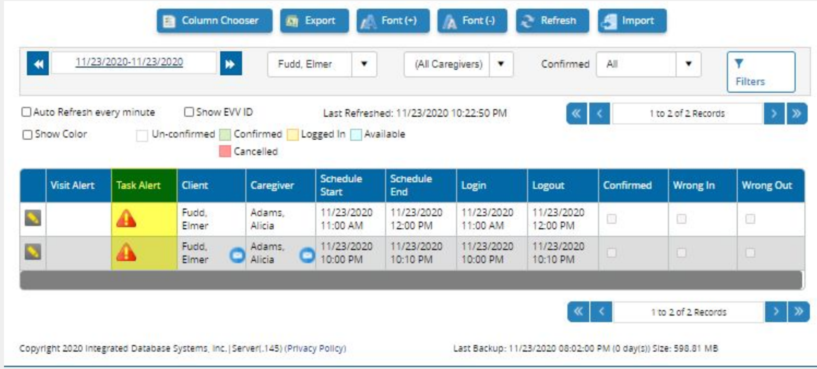
How do I keep track of the completed Tasks?

- ➔ 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.





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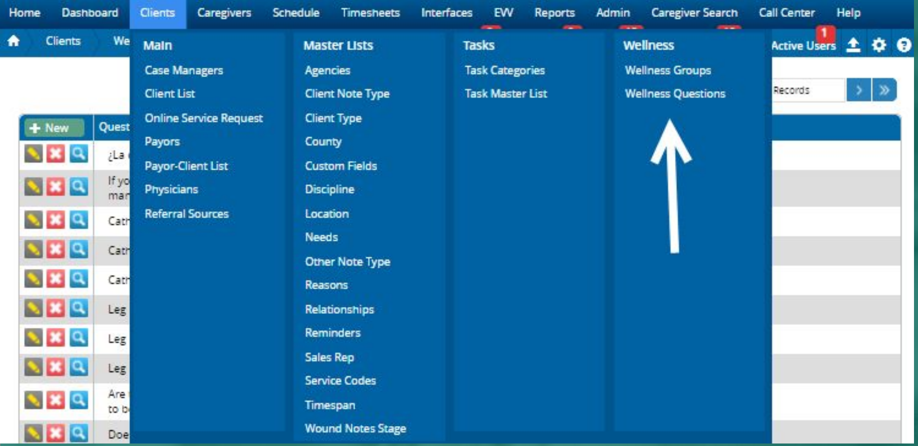

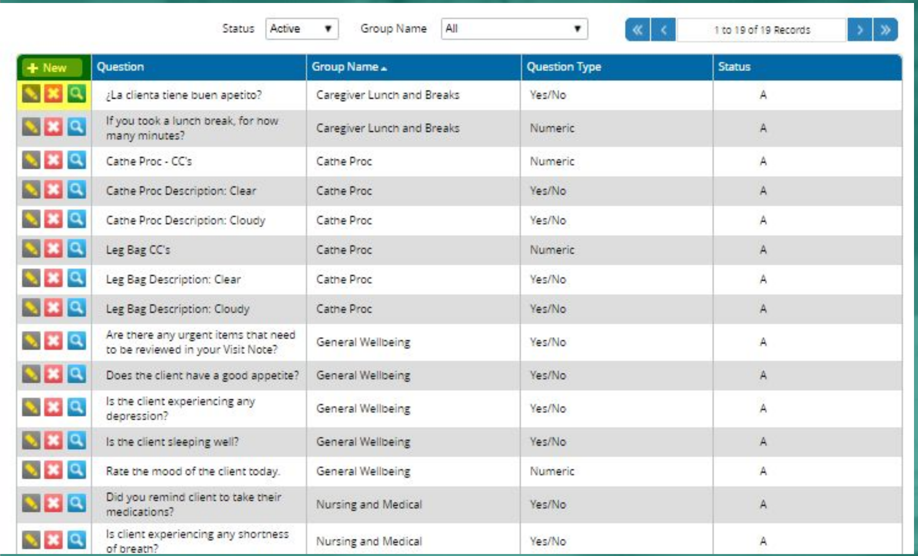

Status Active Group Name All 1 to 19 of 19 Records

New	Question	Group Name	Question Type	Status
	¿La clienta 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 - 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.

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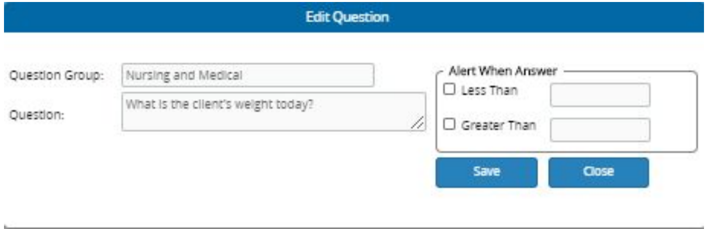
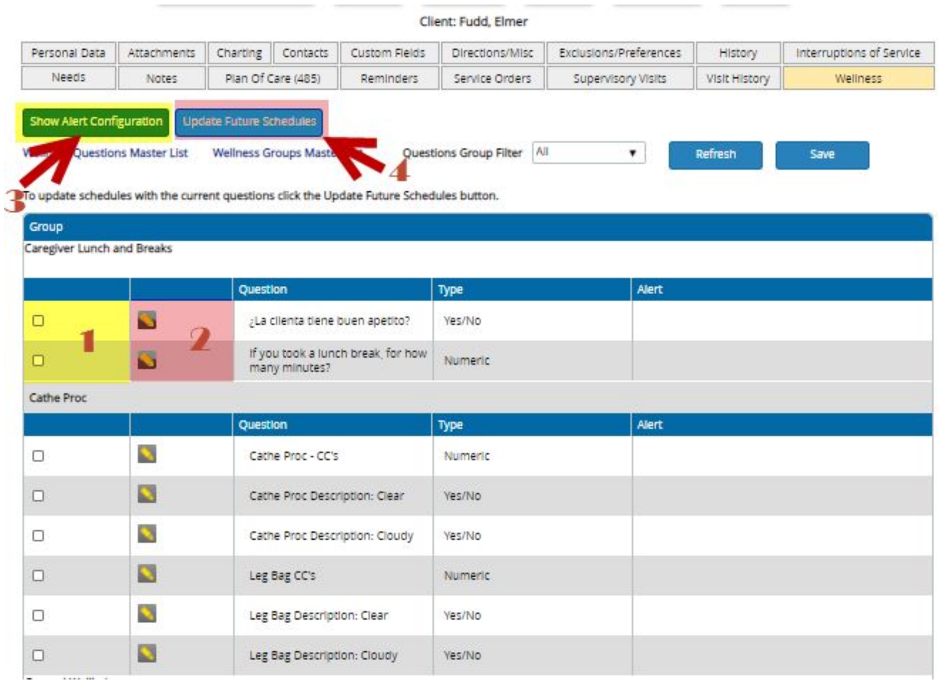
Wellness Questions - Use the Wellness Tab!

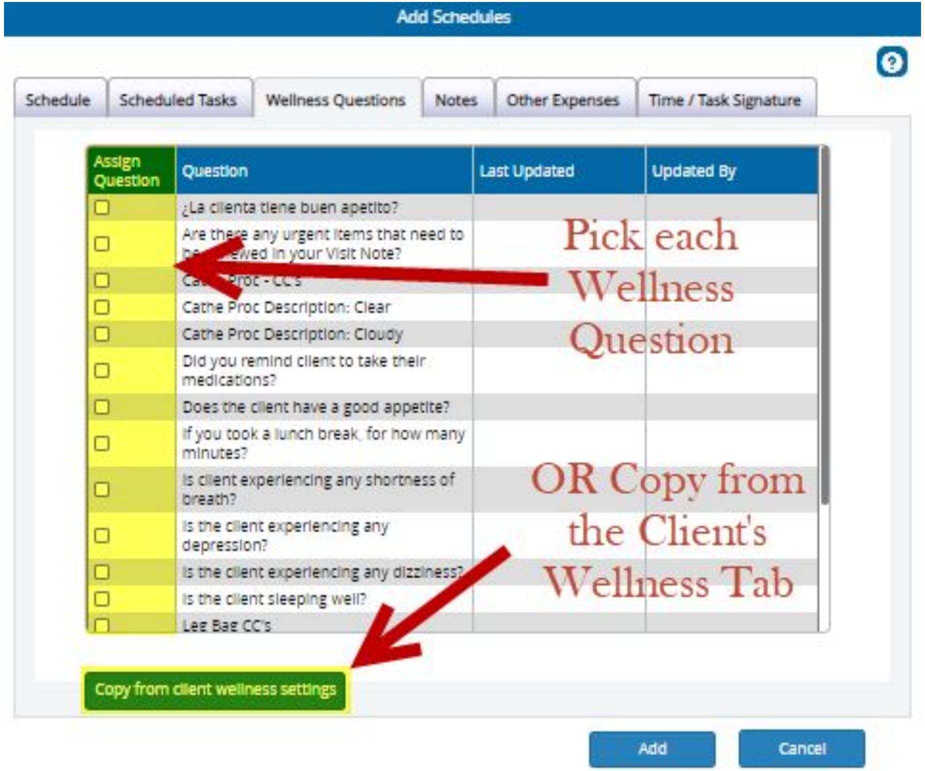
- On the Wellness Tab on each Client's profile, you can pick and choose which Wellness Questions are important for that particular Client (1).
- Set an Alert threshold for when you want to be alerted (2).
  - For example, if you want an Alert for when the Client's blood pressure is above or below a certain 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).





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.

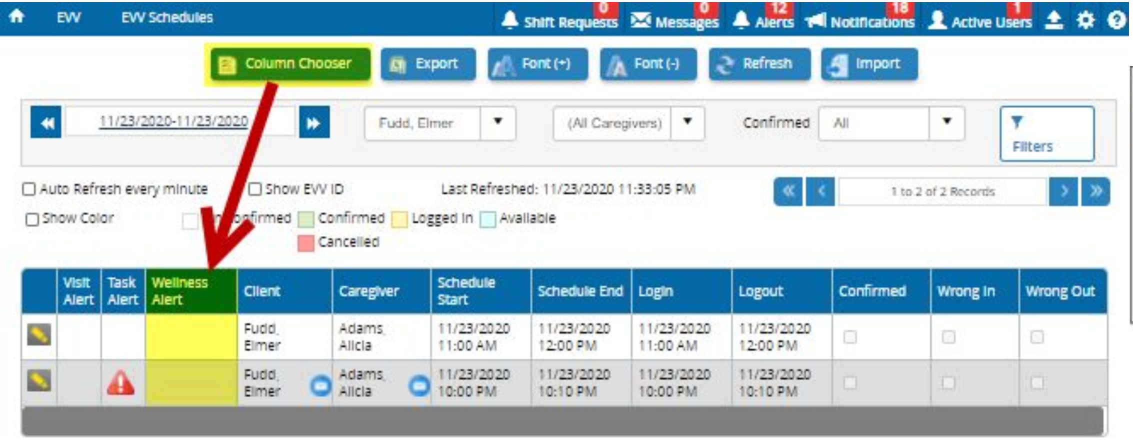


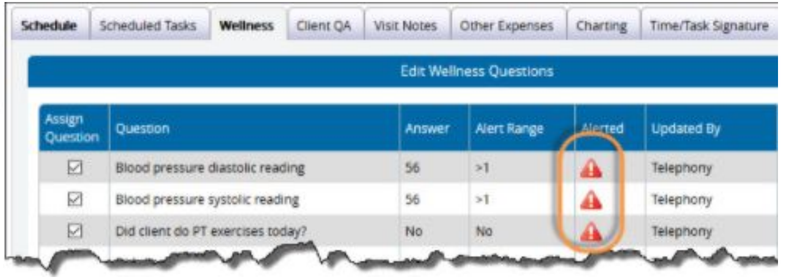
Wellness Alerts and visibility

➔ 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.





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).

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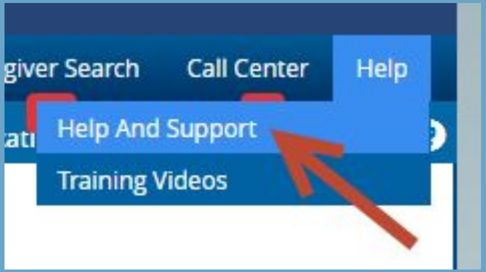
Need assistance?

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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