



GENERATIONS®

Homecare System



Presenter



Customer Success Manager

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Topic:

Scheduling - How it works and how to make it simpler!

Today we'll cover:

- Company Settings - Calendar Options tab
- Different Views - Day, Week, Month, and Grid
- Creating and Editing Schedules
- Service Codes, Service Orders, and Payroll Items
- IOS (Client), Absence (CG), and Unavailable (CG)
- Daily Schedule Reminders and Reports
- Shift Requests and Caregiver Search

Company Settings - Calendar Options Tab

Admin Company Settings

Shift Requests 3 Messages 0 Alerts 9 Notifications 136 Active Users 1

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

Calendar Display ?

Entire Month (eg: Jan 1 - Jan31)

Show entire pay period ending weeks in the month

Additional Options

Default schedules as confirmed ?

Show service code short description with schedules ?

Show payor 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

FTE Alert

Enable FTE Alert (weekly)

FTE Alert after exceeding # hours

Close

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- Adjust your Agency's overall Calendar settings in Admin->Company Settings->Calendar Options tab.
- Each User can customize their own options using the Display Options tab on the Calendar.
- Hover your mouse on the ? to see a quick tip or toggle the option on and then go to the Calendar to see if you like it.

Day, Week, Month, and Grid Views

1. Day
2. Week
3. Month
4. Grid

Welcome Kevin
Adjust Resolution | Logout

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

Schedules Calendar New

Shift Requests 3 Messages 0 Alerts 9 Notifications 137 Active Users 1

Add Schedules Edit Schedules Delete Range Client Note Confirm Font(-) Font(+) Caregiver Search Refresh

Berkley, Elizabeth, 9893172113, 2625 Denison Dr., Mt. Pleasant, MI, 48858

Berkley, Elizabeth Filters 06/23/2020-06/23/2020 Display Options (All Caregivers)

Un-confirmed Confirmed Logged in Available Day Week Month Grid 1 to 1 of 1 Records

Client Tuesday, June 23, 2020

7A	7A	7A	8A	8A	9A	9A	10A	10A	11P	11P
									(Available, Shift)	(Available, Shift)

Berkley, Elizabeth
9893172113

(Available, Shift)
06:30 P-10:30 P
Service: CNA1
Payer: 00Anoop
00Anoop

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

Schedules Calendar New

Shift Requests 3 Messages 0 Alerts 9 Notifications 137 Active Users 1

Add Schedules Edit Schedules Delete Range Client Note Confirm Font(-) Font(+) Print Caregiver Search Refresh

Berkley, Elizabeth, 9893172113, 2625 Denison Dr., Mt. Pleasant, MI, 48858

Berkley, Elizabeth Filters 06/23/2020-06/29/2020 Display Options (All Caregivers)

Un-confirmed Confirmed Logged in Available Day Week Month Grid 1 to 1 of 1 Records

Client	Tuesday Jun-23	Wednesday Jun-24	Thursday Jun-25	Friday Jun-26	Saturday Jun-27	Sunday Jun-28	Monday Jun-29
Berkley, Elizabeth 9893172113	(Available, Shift) 06:30 P-10:30 P (04:00) Service: CNA1 Payer: 00Anoop 00Anoop	Add New Copy	Add New Copy	Add New Copy	Add New Copy	(Available, Shift) 06:30 P-10:30 P (04:00) Service: CNA1 Payer: 00Anoop 00Anoop	Add New Copy

4:00 | 4:00 4:00 | 8:00

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Schedules Calendar New

Shift Requests 3 Messages 0 Alerts 9 Notifications 137 Active Users 1

Add Schedules Edit Schedules Delete Range Client Note Confirm Font(-) Font(+) Print Caregiver Search Refresh

Made, Taylor, 9893172113, 2625 Denison Dr., Mt. Pleasant, MI, 48858

Made, Taylor Filters June 2020 Display Options (All Caregivers)

Un-confirmed Confirmed Logged in Available Canceled Day Week Month Grid

Thu	Fri	Sat	Sun	Mon	Tue	Wed
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	30	31	1
2	3	4	5	6	7	8

Welcome Kevin
Adjust Resolution | Logout

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

Schedules Grid New

Shift Requests 3 Messages 0 Alerts 9 Notifications 137 Active Users 1

Add Schedules Select Date Refresh Print

(All Clients) Filters 06/14/2020 - 06/29/2020 Display Options (All Caregivers)

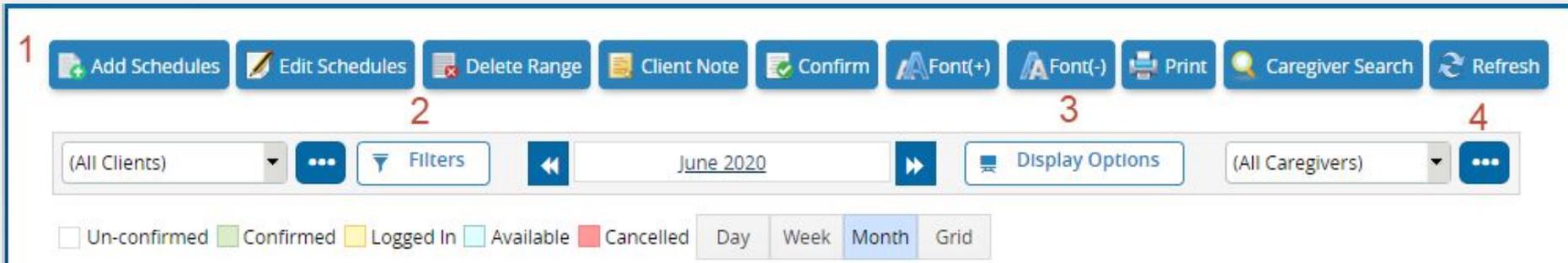
Un-confirmed Confirmed Logged in Available Canceled Day Week Month Grid 1 to 5 of 5 Records

Clients	Caregivers	Service Order	Service	PR Item	Confirmed	Date	StartTime	EndTime	Hours
Berkley, Elizabeth	Johnson, Donald		PCS	Hourly Rate 2	<input type="checkbox"/>	06/15/2020	04:45 PM	04:46 PM	00:00
Berkley, Elizabeth	(Available, Shift)		CNA - Level 1		<input type="checkbox"/>	06/15/2020	06:30 PM	10:30 PM	04:00
Berkley, Elizabeth	(Available, Shift)		CNA - Level 1		<input type="checkbox"/>	06/16/2020	06:30 PM	10:30 PM	04:00

Main differences between Day, Week, Month, and Grid views

- DAY View - Quickly see who has shifts on 1 certain day.
 - ◆ By default this is displayed by Client, but use the Display Options button to switch it to the Caregiver View.
- WEEK View - Quickly see who has shifts during a specific week.
 - ◆ By default this is displayed by Client, but use the Display Options button to switch it to the Caregiver View.
- MONTH View - See all the shifts scheduled for a specific Client or Caregiver for an entire calendar month.
- GRID - See all shifts in a specific time period laid out in line item format.
 - ◆ Quick Confirm button allows shifts to be confirmed simply by checking the box.

Buttons on the Schedule



- 1) Add new schedules, Edit a range of scheduled shifts, Delete a range of shifts, add an internal Client Note or a Visit Note on a specific day, Confirm a range of shifts, Increase/Decrease the Font Size, Print the current view of the schedule, Utilize Caregiver Search, and Refresh the page.
- 2) Filter by Case Manager, Client Type, Location, Service provided, Class, Payroll Item, Payor, and Status.
- 3) Display Options include showing Color, Confirmed Icons, Payor, Service, Payroll Item, and Hours. You can also hide Clients without schedules and show a Calendar Scrollbar.
- 4) Select a Client or Caregiver and click the button with 3 white dots to go straight to their Personal Data screen.

Creating Schedules

- When you click Add Schedules on any view of the schedule (or Copy or Add New on the day on the schedule), you will select the specific details of the shift. The required items are the Client, Service, Payor, Caregiver, Payroll Item, Start/End Date(s), Start/End Times, and the days of the week.
- Additional features available on shifts include Tasks, Wellness Questions, Notes, Other Expenses, and there's also a Time/Task Signature tab in case you need to collect signatures from the Caregiver, the Client, or both.
- Make things easier by:
 - ◆ Setting up a Service Order for different services the Client receives.
 - ◆ Set a Default Payroll Item for the Caregiver.
 - ◆ Set up a Care Plan and select the Tasks required for each individual Client.
 - ◆ Set up Care Note, Wound Note, and Electronic Signature requirements on the individual Client's profile.

The screenshot shows the 'Add Schedules' form with the following details:

- Client Details:** Client: Berkley, Elizabeth; Service Order: RN Care; Service: RN Care; Payor: Michigan Medicaid MMEDE.
- Caregiver Details:** Caregiver: Johnson, Donald; Payroll Item: Hourly Rate 2; Rate: \$10.00.
- Date/Time:** Start Date: 06/22/2020; End Date: 06/22/2020; Start Time: 10:00 AM; End Time: 11:00 AM.
- Frequency:** Weekly selected; Every 1 weeks; Days: M-F, All Days, and a calendar grid with Mo checked.

24

Add New
Copy

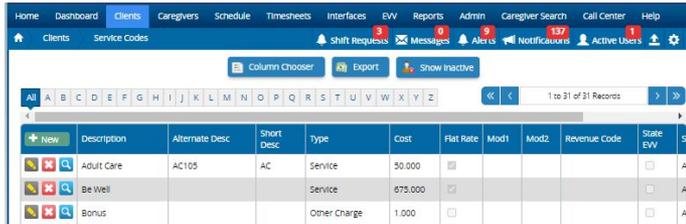
Editing Schedules

- For a single shift - click on the shift itself (or on the pencil to the left of the shift on the Grid view) to see the details and edit.
- You can also click and drag 1 shift to another day.
- For multiple shifts - click on the Edit Schedules button at the top and enter the information you want to change. This works best if you input minimal information that you want to change. Don't fill out every field, just what you want to change.

The screenshot shows the 'Edit Schedules' form with the following details:

- Tab:** Schedule
- Caregiver(s):** Existing caregiver: All Caregivers; New Caregiver: ; Payroll Item:
- Client(s):** Client: Berkeley, Elizabeth; Require Care Notes: ; Require Wound Notes: ; Default Care Note: Care Note Sequence TEST; Care Note Sequence: TEST; Keep Existing: (Service Order), (Payor), (Service)
- Date Range:** Start Date: 06/22/2020; End Date: 06/22/2020; All Future Dates:
- Starting Time(s):** All Times: ; Starting Time: ; New Time(s): Change Times; Start: ; End:
- Frequency:** Every: 1 Weeks
- Confirmed Status:** No Change; Confirmed; Not Confirmed
- Days:** M-F: ; All Days: ; Su: ; Mo: ; Tu: ; We: ; Th: ; Fr: ; Sa:
- E/V Alerts:** No Change; Enabled; Disabled
- Mileage Prompt:** No change; Enabled; Disabled

Make things easier with Service Codes, Service Orders, and Payroll Items



	Description	Alternate Desc	Short Desc	Type	Cost	Flat Rate	Mod1	Mod2	Revenue Code	State
	Adult Care	AC105	AC	Service	50.000					A
	Be Well			Service	675.000					A
	Bonus			Other Charge	1.000					A

- Service Codes - 3 important fields
 - ◆ Description - This is what you'll see when selecting the Service Code on a new schedule.
 - ◆ ShortDesc - This is what you'll see if you enable the "Show service code short description with schedules" option on the Calendar Options tab in Company Settings.
 - ◆ Alternate Desc - This is the CPT/HCPCS Code. Required for CMS 1500/UB-04 (837P/I). This field is also displayed when setting up a new schedule.

- Service Orders - Primarily used for keeping track of authorizations from Payors, but you can also use Service Orders for Private Pay to make things easier for your Scheduler.
 - ◆ Each Service Order has a date range for when it's active, Service Code, and Payor so when you select the Service Order when scheduling, it will plug in some of the details for you.
 - ◆ Auto create schedules when adding Service Order - Use the checkbox at the bottom of the Service Order if you know which Caregiver and Payroll Item you'll be scheduling with. NOTE - You can only use the Auto create function when you're initially creating the Service Order.

- Payroll Items - Name your Payroll Items to correspond with the dollar amount per hour you're going to pay your Caregiver. For instance, if you're going to pay your Caregiver \$15 per hour for a specific Payroll Item, name it with a 15 in the Payroll Item Name - i.e. Personal Care-15. That way when you add the Payroll Item to the Caregiver's Payroll Items tab, you'll know exactly what rate to enter.

Making things even easier with IOS (Client), Absence (CG), and Unavailable (CG)



- IOS or Interruption of Service (Client) - Use this area to document when a Client does not require services and the reason for the interruption: ER Visit, hospitalized, family visiting, client is traveling, etc. You can also cancel shifts from here. For a report of interruptions, use the client interruption of service report. Also, the information on this screen populates the Hospital 30 Day Re-Admission Report.
 - ◆ This will put a blue line on the Calendar for this particular Client and when your scheduler tries to create a new schedule for them, they will get an Alert letting them know the Client has an IOS during the time they're trying to schedule for.

- Absence (CG) - Absences are used to track when and why a CG is not at work. This can be used for things that are planned or unforeseen situations, like vacations or sick days or even no call-no show days. You can specify the start/end dates along with start/end times if the CG was only out for a portion of a single day.
 - ◆ This will put a red line on the Calendar for this particular CG and when your scheduler tried to create a new schedule for them, they will get an Alert letting them know the CG has an Absence entered during the time they're trying to schedule for.

- Unavailable (CG) - This option is used to record recurring days and times your CG is NOT available to work. For example, if your CG is a college student and has classes at the same time on consistent days of the week.
 - ◆ This will put the words, "Unavailable Time" in red text on the Calendar and when your scheduler tried to create a new schedule for them, they will get an Alert letting them know the CG has an Unavailable Time entered during the time they're trying to schedule for.

IOS (Client), Absence (CG), and Unavailable (CG)



Calendar view for client **Barkley, Charles** in **June 2020**. The calendar shows days from Thursday to Wednesday. Key events include:

- June 31 (Sun):** Unavailable Time 12:00 A-11:59 P (23:59)
- July 7 (Sun):** Unavailable Time 12:00 A-11:59 P (23:59)
- July 14 (Sun):** Unavailable Time 12:00 A-11:59 P (23:59)
- July 21 (Sun):** Unavailable Time 12:00 A-11:59 P (23:59)
- July 28 (Sun):** Unavailable Time 12:00 A-11:59 P (23:59)
- July 24 (Wed):** Absence 12:00 A-11:59 P(s)

Each day has an "Add New Copy" link. A red arrow points to the absence event on July 24.

Add Schedule form for **Barkley, Charles**. A yellow warning box at the top states: "3 conflicts exist with the proposed schedules: 1 conflict(s) are due to the client having a scheduled interruption of service, 1 conflict(s) are due to a caregiver having a scheduled absence, 1 service order violation(s)." A red arrow points to this box.

Below the warning, there are links: "To view the conflict report click here", "To add schedule anyway click here", and "To cancel and continue with another schedule click here".

The form includes sections for:

- Client Details:** Client: Barkley, Elizabeth; Service Order: -----Select-----; Service: Adult Care; Payor: Michigan Medicaid MMEDC.
- Caregiver Details:** Caregiver: Barkley, Charles; Payroll Item: Visit Rate 1; Rate: \$0.00.
- Date/Time:** Start Date: 06/24/2020; End Date: 06/24/2020; Start Time: 11:00 AM; End Time: 01:00 PM.
- Frequency:** Weekly, Every 1 Weeks.

Calendar view for client **Barkley, Elizabeth** in **06/22/2020-06/28/2020**. The calendar shows days from Monday to Sunday. Key events include:

- June 22 (Mon):** (Available, Shift) 06:30 P-10:30 P (04:00); Service: CNA1; Payor: 00Anoop
- June 23 (Tue):** (Available, Shift) 06:30 P-10:30 P (04:00); Service: CNA1; Payor: 00Anoop
- June 24 (Wed):** Add New Copy
- June 25 (Thu):** Add New Copy
- June 26 (Fri):** Add New Copy
- June 27 (Sat):** Add New Copy
- June 28 (Sun):** Add New Copy

A red arrow points to the "Add New Copy" link for June 24.

Daily Schedule Reminders and Reports

Reminders

Schedule Reminders

- Enable daily schedule reminders (sent at 5:30pm)
- Send App Notification for schedule reminders

Caregiver Reminders

- Include App Notification
- Include text Notification

Email Account: ▼

[Email Summary Notification](#)

Categories

- All
- Case Manager
- Schedules
- Billing
- Clients
- EW
- Caregivers
- Mailing Labels/Badges
- Timesheet/Payroll

Select Format

- PDF
- Excel
- Excel Data
- Word
- RTF
- Email

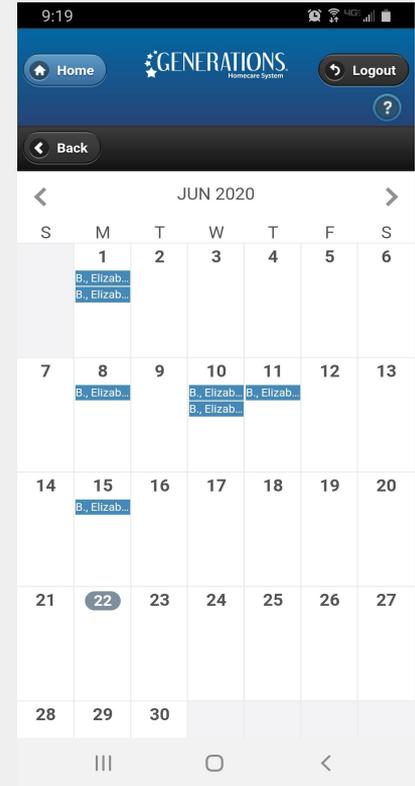
Schedule Reports [★ Favorites](#)

Name	Description
★ Available Shifts Grouped by Date	Displays available shifts grouped by date.
★ Available Shifts Grouped by Client	Lists all available shifts by client and date range.
★ Calendar Reports	Print calendar reports grouped by clients or caregivers.
★ Cancelled Shifts	Schedules by date with cancelled Shifts
★ Caregiver Mini-Schedules	Prints schedules in a condensed format grouped by caregivers.
★ Charting Report	Report on care and wound notes.
★ Client Mini-Schedules	Prints schedules in a condensed format grouped by clients.
★ Completed Schedules and Tasks	Lists schedules with task status, EVV logins, and signatures.
★ Confirmed Shifts	All confirmed shifts by date range.
★ Other Expenses Report by Caregiver	Lists other expenses as entered on the other expense tab of the schedule form.
★ Schedule Conflict Report	Report identifies schedules having the following conflicts: Overlapping shifts, Service Order Authorizations, Exclusions, Interruptions of Service, Scheduled Absences, and availability.
★ Scheduled Overtime Hours Report	Scheduled Overtime Hours Report.
★ Scheduled Service Ending	Displays the last scheduled date for each service per client. Use this report to identify schedules that need to be extended.
★ Scheduled Task Report	Listing of schedules with tasks to be completed grouped by client or caregiver.
★ Scheduled vs. Confirmed Times	Displays the scheduled vs. the confirmed time for each shift grouped by client or caregiver
★ Schedules by Date	Lists all schedules by date sorted by date, start time of shift, and caregiver.
★ Schedules Missing Timesheets	Listing of schedules that do not have an associated timesheet record.
★ Screening Report	Results for screening of caregivers prior to working.
★ Unconfirmed Shifts	Lists all unconfirmed shifts by client and date range.
★ Virginia Medicaid DMAS-90	DMAS-90 provider aide record required by Virginia Medicaid.
★ Weekly Schedules Report	List Weekly Schedules.
★ Wellness Report	Lists all wellness questions associated with schedules grouped by clients and dates.

Daily Schedule Reminders and Reports Continued...

There are 3 easy ways of sharing an upcoming schedule with your Caregivers:

- 1) Daily Schedule Reminders are automated email reminders sent to Caregivers at 5:30 pm local time of their schedule for the following day. These messages, when enabled, are only sent to Caregivers that have a scheduled shift for the next day.
- 2) Email Reports - You can find a range of scheduling reports under Reports->Schedules. If you want to Email the report to the email address on the Caregiver's profile, click the Email Format option prior to running the report. Some reports have an "E-Mail Report" button when you run them so you might not have to change the format.
- 3) Additionally, you can allow your Caregiver access to the mobile App so they can log in and check their upcoming schedules. EVV/Telephony subscription is NOT required to allow your Caregivers to use the mobile App, but it is required to clock in/out for those schedules. Check the "Send App Notification for schedule reminders" option so your Caregivers get both an email and a push notification via the App to log in to check their upcoming schedules.



Shift Requests and Caregiver Search

There are also a couple of functionalities that will help with filling a shift:

- 1) **Shift Requests** - By utilizing the “Available Shift” Caregiver, you can allow your Caregivers to request shifts that are scheduled, but don’t have an actual Caregiver assigned. To use this feature, you’d need to allow your Caregivers access to the App and allow them to request shifts via the App in Admin->Company Settings->Web Portal Tab. Once a Caregiver requested an Available Shift, there will be a “request” displayed on the Calendar.
- 2) **Caregiver Search** - Use this feature to find a Caregiver to fill a shift or a range of shifts and add them directly into the schedule. This feature looks at the Client, shift days/times, the Service, Days of the Week, and any Needs/Attributes that are required. You can take this a step further and narrow down your list of Available Caregivers by their Classification, City, Class, or even distance from the Client!

The screenshot shows a calendar interface for a client on Tuesday, June 23. A shift is listed from 06:30 P-10:30 P (04:00) for Service: CNA1, Payor: 00Anoop. The caregiver is Elizabeth Berkley (9893172113). A notification indicates '1 requests' for this shift. There are buttons for 'Add New' and 'Copy'.

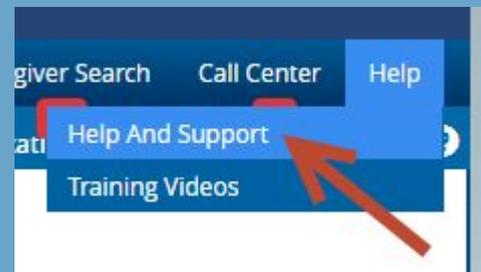
Client	Tuesday
Jun-23	
(Available, Shift) ?	
06:30 P-10:30 P (04:00)	
Service: CNA1	
Payor: 00Anoop	
00Anoop	
1 requests	
Add New	
Copy	
4:00 4:00	

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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