




# Presenter



Customer Success Manager

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# Caregiver Search

## AGENDA

- **Benefits of Using**
- **Sneak Peak**
- **Related Areas of the System**
- **Putting it All Together**
- **Best Practices**



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# Caregiver Search

## Benefits of Using

- Fill single or multiple shifts
- Offer open shifts
- Simultaneous documentation of work offered/accepted/refused
- Search by multiple criteria
- Map Search Results
- Avoid unnecessary OT
- Avoid unnecessary Travel Time
- Avoid overbooking
- Avoid double-booking

# Caregiver Search - “Sneak Peak”

Search based on:

- Date/time
- Day of week
- Needs/Attributes (required/optional)
- Several caregiver characteristics
- Distance between caregiver & client
- Preferences/Exclusions
- Percentage of Availability
- Time between shifts (drive time)
- Include Applicants

Let's walk thru a quick scenario first - then we'll look at each of the 'pieces 'n' parts' of Caregiver Search.

Caregiver Search

Client Visit History

Search

Export

Print

Save Search

Load Search

Send Text Message

Close

Client Filters

Client

Brady Wayne

Date From

11/23/2020

Date Thru

12/31/2020

Service Order

-----Select-----

Start Time

5:00 AM

End Time

7:30 AM

Service

Adult Care

Days/Week

☒ Su
 ☒ Mo
 ☒ Tu
 ☒ We
 ☒ Th
 ☒ Fr
 ☒ Sa

Select all days

Needs Filter

☐ Select all Required
 ☒ Select All Assigned
 ☐ Select None

Needs

Required

☐ Any Attributes
 ☐ Alzheimers - Dementia
 ☒ Assist with Bathing
 ☒ Companionship and Conversation
 ☐ Diabetic Care

Caregiver Filters

Classification

(All)

Class

All Class

Text Msg Group

(All)

City

(All Cities)

County

(All Counties)

Zip

(All)

Gender

(All)

Available %

50%

☐ Include Applicants
 ☐ Show Scheduled Hours
 ☒ Show OT Alert
 ☒ Require
 

30

minutes between shifts

Column Chooser

Proximity (Miles)

Map Results

Preferred Caregiver

Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

<<

<

1 to 8 of 8 Records

>

>>

	Schedule	Notes	Map	Caregiver	Pref	Avail %	Distance	County	OTAlert	Prior Visits
	Add	Add	Map	Courts, Mona		87.00 %	1.05	Isabella	<input type="checkbox"/>	0
	Add	Add	Map	Daniels, Jack		100.00 %	3.35	Isabella	<input type="checkbox"/>	0
	Add	Add	Map	Dillings, Cynthia (Sam)		100.00 %	1.47	Isabella	<input checked="" type="checkbox"/>	0

# Caregiver Search Scenario

## Here's an example:

Client Dudley DoRight has shifts scheduled for M, W, F thru end of January '21. I have no idea what caregiver will be able to work those shifts.

I'd like to fill them all in one shot, if possible. I'll click on that first shift on the 25th....

Once I have that shift open - I see a **Caregiver Search** button in the lower part of the screen.

DoRight, Dudley, 879-213-2196, 2625 Denison Drive, Mt. Pleasant, MI, 48858

DoRight, Dudley Filters November 2020 Display Options (Available, Shift)

Un-confirmed Confirmed Logged In Available Cancelled Day Week Month Grid

Sun	Mon	Tue	Wed	Thu	Fri	Sat
15 Add New Copy	16 Add New Copy	17 Add New Copy	18 Add New Copy	19 Add New Copy	20 Add New Copy	21 Add New Copy
22 Add New Copy	23 Add New Copy	24 Add New Copy	25 DoRight, Dudley 04:30 P-06:30 P (2) Service: CMP Payor: (Self) Add New Copy	26 Add New Copy	27 DoRight, Dudley 04:30 P-06:30 P (2) Service: CMP Payor: (Self) Add New Copy	28 Add New Copy
29 Add New Copy	30 DoRight, Dudley 04:30 P-06:30 P (2) Service: CMP Payor: (Self)	1	2 DoRight, Dudley 04:30 P-06:30 P (2) Service: CMP Payor: (Self)	3	4 DoRight, Dudley 04:30 P-06:30 P (2) Service: CMP Payor: (Self)	5

es Charting Time / Task Signature Exceptions Screening

End: 06:30 PM

ire Wound Notes  
☐ Require Care Notes  
Care Note: All

Payor: --SELF-- Service: Companionship Pay Item:

Caregiver: (Available, Shift)

☐ Confirmed ☐ Cancelled Shift

Notes:

EVV Alert: ☒ Enabled ☐ Disabled Client QA: ☐ Enabled ☒ Disabled Mileage Prompt: ☒ Enabled ☐ Disabled

Caregiver Search Delete Schedule Audit Trail Update Cancel

# Caregiver Search Scenario

That takes me directly to **Caregiver Search**.

You can see here that, since I came here from that shift on the 25th, it's assuming I want to find a caregiver to fill that shift. It's filled in the client, service, date & times, day of the week.

Note that it also knows what Mr. DoRight needs in a caregiver - his Needs are already selected.

I don't want to fill just this one shift - I want to try to fill them ALL - out thru the end of January. I'll change my Date Thru to 1/31/2021, and select M, W, F.

The screenshot shows the 'Caregiver Search' interface. At the top, there's a navigation bar with icons for Shift Requests, Messages, Alerts, Notifications, and Active Users. Below this, the 'Caregiver Search' tab is active, and the 'Client Visit History' tab is also visible. The main search area includes buttons for Search, Export, Print, Save Search, Load Search, Send Text Message, and Close. The search filters are as follows:

- Client Filters:**
  - Client: DoRight Dudley
  - Service Order: .....Select.....
  - Service: Companionship
  - Days/Week: ☐ Su ☐ Mo ☐ Tu ☒ We ☐ Th ☐ Fr ☐ Sa
- Date and Time:**
  - Date From: 11/25/2020
  - Date Thru: 11/25/2020
  - Start Time: 04:30 PM
  - End Time: 06:30 PM
- Needs Filter:**
  - ☐ Select all Required
  - ☒ Select All Assigned
  - ☐ Select None
- Needs List (Right Panel):**

Needs	Required
Any Attributes	<input type="checkbox"/>
Alzheimers - Dementia	<input type="checkbox"/>
Assist with Bathing	<input checked="" type="checkbox"/>
Companionship and Conversation	<input checked="" type="checkbox"/>
Diabetic Care	<input type="checkbox"/>

Below the search filters, there's a 'Caregiver Filters' section with a 'Column Chooser' button. The 'Proximity (Miles)' field is empty, and the 'Map Results' button is visible. The 'Preferred Caregiver' and 'Caregiver with Prior visit' buttons are also present. At the bottom, there's a table with columns: Schedule, Notes, Map, Caregiver, Pref, Avail %, Distance, County, Hours, OAlert, and Pri. The table is currently empty, showing '0 to 0 of 0 Records'.



# Caregiver Search Scenario

Now it knows I'm looking for someone who has the Attributes to meet the Needs assigned to this client, who is available to work thru the end of January on M, W, and F from 4:30p-6:30p.

I could click SEARCH (upper left) now - and it would list all caregiver who meet all of those requirements.

In this case, however - I have some additional criteria.

Let's look at Caregiver Filters - you see that button about mid-way down the screen on the left-hand side.

The screenshot shows the 'Caregiver Search' application interface. At the top, there's a navigation bar with icons for Shift Requests (0), Messages (0), Alerts (1), Notifications (18), and Active Users (1). Below this, the main header has 'Caregiver Search' and 'Client Visit History' tabs. A red arrow points to the 'Caregiver Search' tab. The search area includes buttons for Search, Export, Print, Save Search, Load Search, Send Text Message, and Close. The 'Client Filters' section contains dropdowns for Client (DoRight Dudley), Service Order (Select), and Service (Companionship). It also has date and time filters: Date From (11/25/2020), Date Thru (01/31/2021, highlighted in green), Start Time (04:30 PM), and End Time (06:30 PM). A 'Days/Week' section shows checkboxes for Su, Mo (checked, highlighted in green), Tu, We (checked, highlighted in green), Th, Fr (checked, highlighted in green), and Sa, with a 'Select all days' button. A 'Needs Filter' section has radio buttons for 'Select all Required', 'Select All Assigned' (selected), and 'Select None'. On the right, a 'Needs' list shows 'Any Attributes', 'Alzheimers - Dementia', 'Assist with Bathing' (checked), 'Companionship and Conversation' (checked), and 'Diabetic Care'. Below the filters, there's a 'Caregiver Filters' button with a plus sign, highlighted by a red arrow. Further down are 'Column Chooser', 'Proximity (Miles)' input, 'Map Results' button, and buttons for 'Preferred Caregiver' and 'Caregiver with Prior visit'. A status bar at the bottom shows '0 to 0 of 0 Records' and a table with columns: Schedule, Notes, Map, Caregiver, Pref, Avail %, Distance, County, Hours, OTAlert, and Pri.



# Caregiver Search Scenario

I want to see all caregivers who would be available to work at least 50% of those shifts. I also want to filter to those who would have at least 20 minutes to get to this shift from their previous shift - and will have at least 20 minutes between this one and their next shift of the day.

Since I'm trying to avoid overtime - I want to see if putting someone on these shifts would put them into an overtime situation.

NOW - I'll click Search!

The screenshot displays the 'Caregiver Search' interface with the following elements:

- Client Filters:**
  - Client: DoRight Dudley
  - Service Order: -----Select-----
  - Service: Companionship
  - Date From: 11/25/2020, Date Thru: 01/31/2021
  - Start Time: 04:30 PM, End Time: 06:30 PM
  - Days/Week: ☐ Su, ☒ Mo, ☐ Tu, ☒ We, ☐ Th, ☒ Fr, ☐ Sa. A 'Select all days' button is present.
  - Needs Filter:**
    - ☐ Select all Required
    - ☒ Select All Assigned
    - ☐ Select None
  - Needs List:**
    - Any Attributes: ☐
    - Alzheimers - Dementia: ☐
    - Assist with Bathing, Companionship and Conversation: ☒
    - Diabetic Care: ☐
- Caregiver Filters:**
  - Classification: (All), Class: All Class, Text Msg Group: (All)
  - City: (All Cities), County: (All Counties), Zip: (All)
  - Gender: (All), Available %: 50% (highlighted in green)
  - ☐ Include Applicants, ☐ Show Scheduled Hours
  - ☒ Show OT Alert, ☒ Require 20 minutes between shifts (highlighted in green)
- Buttons:** Search, Export, Print, Save Search, Load Search, Send Text Message, Close.
- Additional Options:** Column Chooser, Proximity (Miles), Map Results, Preferred Caregiver, Caregiver with Prior visit.
- Footer:** (Proximity is estimated based on point-to-point calculations and will be less than the mapped distance), 1 to 7 of 7 Records, and a table header with columns: Schedule, Notes, Map, Caregiver, Pref, Avail %, Distance, County, OTAlert, Prior Visits.

# Caregiver Search Scenario

The search results show seven caregivers who are good candidates. They are available to work, they have the Attributes to meet the Needs of the client - and they'll have that gap of 20 minutes between this shift and other shifts each day. Four of them show 100% availability - they would be able to work ALL of these shifts thru the end of January.

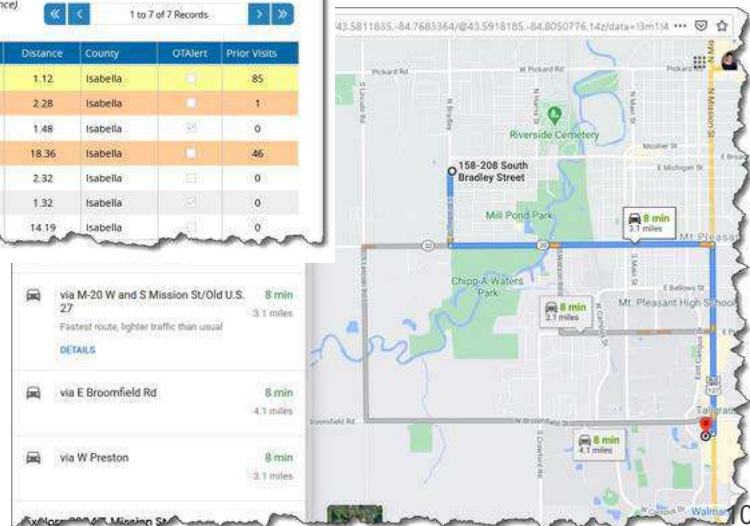
I can even see that one of these caregivers - Sadie - is Preferred by this client. She can do them all, and she lives just a bit more than a mile away from the client.

I can click on **Map** for Sadie - and that brings up a map with the turn by turn for Sadie to get to this client's place of service.

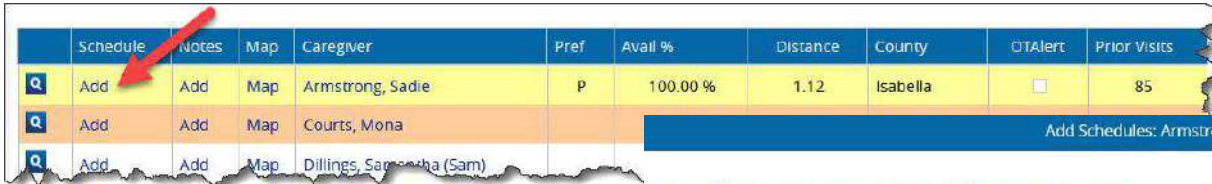
I'm going to go ahead & put Sadie Armstrong on these shifts...

The screenshot shows a web application for searching caregivers. At the top, there are fields for 'Service Order' (set to 'Companionship'), 'Start Time' (04:30 PM), and 'End Time' (06:30 PM). Below these are 'Days/Week' checkboxes (Su, Mo, Tu, We, Th, Fr, Sa) and a 'Select all days' button. A 'Needs Filter' section allows selecting 'All Required', 'All Assigned', or 'Select None'. On the right, a 'Any Attributes' list includes 'Alzheimers - Dementia', 'Assist with Bathing', 'Companionship and Conversation', and 'Diabetic Care'. A 'Caregiver Filters' section includes dropdowns for 'Classification' (All), 'City' (All Cities), 'Gender' (All), 'Class' (All Class), 'County' (All Counties), 'Available %' (50%), 'Text Msg Group' (All), and 'Zip' (All). There are also checkboxes for 'Include Applicants', 'Show Scheduled Hours', 'Show OT Alert', and a 'Require' field set to '20 minutes between shifts'. Below the filters are buttons for 'Column Chooser', 'Proximity (Miles)', 'Map Results', 'Preferred Caregiver', and 'Caregiver with Prior visit'. A note states: '(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)'. A pagination bar shows '1 to 7 of 7 Records'. The results table is as follows:

	Schedule	Notes	Map	Caregiver	Pref	Avail %	Distance	County	OTAlert	Prior Visits
	Add	Add	Map	Armstrong, Sadie	P	100.00 %	1.12	Isabella		85
	Add	Add	Map	Courts, Mona		100.00 %	2.28	Isabella		1
	Add	Add	Map	Dillings, Samantha (Sam)		93.00 %	1.48	Isabella		0
	Add	Add	Map	Jackson, Loretta		82.00 %	18.36	Isabella		46
	Add	Add	Map	Klement, Penny		100.00 %	2.32	Isabella		0
	Add	Add	Map	Terrell, Kristina		100.00 %	1.32	Isabella		0
	Add	Add	Map	Turnes, Tommy		68.00 %	14.19	Isabella		0



# Caregiver Search Scenario



	Schedule	Notes	Map	Caregiver	Pref	Avail %	Distance	County	OTAlert	Prior Visits
	Add	Add	Map	Armstrong, Sadie	P	100.00 %	1.12	Isabella	<input type="checkbox"/>	85
	Add	Add	Map	Courts, Mona						
	Add	Add	Map	Dillings, Samantha (Sam)						

Add Schedules: Armstrong, Sadie

I click the Add button to the left....  
That brings up Sadie's calendar - with these Available Shifts noted.

Near the top, I can see the criteria in place: date range & times, days of the week - along with service, payor, etc.

I could click 'Add Schedule' on each day individually, but since I want to put Sadie on ALL of the open schedules for the date range, I'll just click "Schedule All" at the bottom right.

To assign all shifts from your search results click the Schedule All button

Schedule

Scheduled Tasks

Wellness Questions

Notes

Other Expenses

Time / Task Signature

Client: DoRight, Dudley 11/25/2020- 01/31/2021 04:30 PM- 06:30 PM (2) (Mon, Wed, Fri)

Service: Companionship Service Order: ☐ Require Care Notes

Caregiver: Armstrong, Sadie Payroll Item: Hourly Default Care Note: All

Payor: --SELF--

Confirm Status: ☐ Confirmed ☒ Un-Confirmed

EVV Alerts: ☒ Enabled ☐ Disabled

Mileage Prompt: ☒ Enabled ☐ Disabled

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Hours
<div>Nov 22</div> <div>Unavailable Time 12:00 A - 11:59 P</div>	<div>23</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div>	<div>24</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div>	<div>25</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div> <div>(Available Shift) 04:30 P - 06:30 P (2)</div> <div>Add Schedule</div>	<div>26</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div>	<div>27</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div> <div>(Available Shift) 04:30 P - 06:30 P (2)</div> <div>Add Schedule</div>	28	25
<div>29</div> <div>Unavailable Time 12:00 A - 11:59 P</div>	<div>30</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div> <div>(Available Shift) 04:30 P - 06:30 P (2)</div> <div>Add Schedule</div>	<div>Dec 1</div> <div>James, Samuel 11:00 A - 04:00 P (5)</div>	<div>2</div> <div>(Available Shift) 04:30 P - 06:30 P (2)</div> <div>Add Schedule</div>	3	<div>4</div> <div>(Available Shift) 04:30 P - 06:30 P (2)</div> <div>Add Schedule</div>	5	10

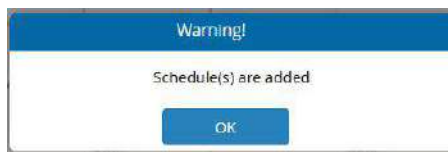
Close

Save

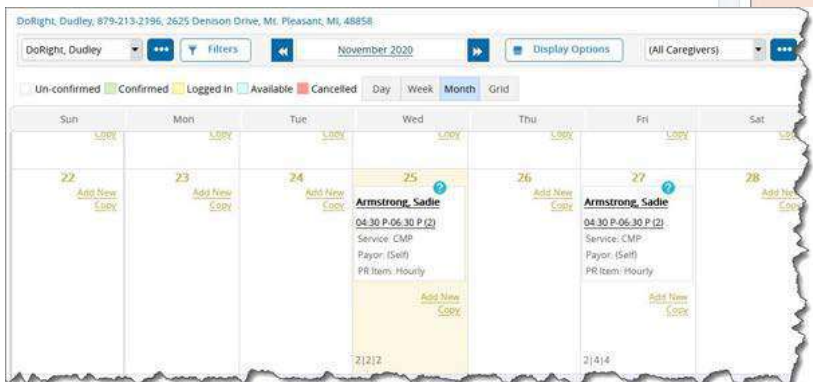
Schedule All

# Caregiver Search Scenario

Now I can see those schedules on Sadie's calendar. I can take her OFF of some of those schedules by clicking on *Remove Schedule* or just click Save at the bottom. This looks good to me - clicking Save.



Mission accomplished!



Add Schedules: Armstrong, Sadie

To assign all shifts from your search results click the Schedule All button

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

Client: DoRight, Dudley 11/25/2020- 01/31/2021 04:30 PM- 06:30 PM (2) (Mon, Wed, Fri)  
Service:  Service Order: ☐ Require Care Notes  
Caregiver: Armstrong, Sadie Payroll Item:  Default Care Note:   
Payor:   
Confirm Status: ☐ Confirmed ☒ Un-Confirmed EVV Alerts: ☒ Enabled ☐ Disabled Mileage Prompt: ☒ Enabled ☐ Disabled

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Hours
Nov 22 Unavailable Time 12:00 A - 11:59 P	23 James, Samuel 11:00 A - 04:00 P (5)	24 James, Samuel 11:00 A - 04:00 P (5)	25 James, Samuel 11:00 A - 04:00 P (5) Armstrong, Sadie 04:30 PM- 06:30 PM (2) Remove Schedule	26 James, Samuel 11:00 A - 04:00 P (5)	27 James, Samuel 11:00 A - 04:00 P (5) Armstrong, Sadie 04:30 PM- 06:30 PM (2) Remove Schedule	28	29
	30 James, Samuel 11:00 A - 04:00 P (5) Armstrong, Sadie	Dec 1 James, Samuel 11:00 A - 04:00 P (5)	2 Armstrong, Sadie 04:30 PM- 06:30 PM (2) Remove	3	4 Armstrong, Sadie 04:30 PM- 06:30 PM (2) Remove	5	16

Close Save Schedule All



# Caregiver Search Components

These areas of the system can all play a part in Caregiver Search.

Needs/Attributes

Classification

Geolocations

City

Gender

Class

County

Zip

Text Message Group

Applicants

Preferences/Exclusions

Absences

Unavailable Time

Schedules

Let's take a closer look.

Caregiver Filters —

Classification (All) Class All Class Text Msg Group (All)

City (All Cities) County (All Counties) Zip (All)

Gender (All) Available % 100%

☐ Include Applicants ☐ Show Scheduled Hours

☐ Show OT Alert ☐ Require  minutes between shifts

Caregiver: Armstrong, Sadie

Personal Data Absence Attachments Attributes Custom Fields Exclusions History In-Services

Miscellaneous Notes Payroll Items Reminders Supervised Visits Unavailable Visit History

First Name Sadie M.I. B. Classification HPA

Last Name Armstrong SSN \*\*\*-\*\*-6598 (999999-NNNNN) Unknown SSN

Status/Reason A Select Birth Date 05/01/1994 26

Hire Date 10/18/2016 Application Date 10/01/2016 Term Date

Phone 1 456-849-8792 (t) Do not Rehire ☐ Gender F

Phone 2 989-879-3156 Class Name MTP

Email sadie@test.com EVV ID 45

Reset Password Enable Web Login NPI

Send Login Link Referred By Other

Other Referred By Samantha Drillings

State License# 123456789 Paychex ID 0123456789

Text Msg# 1234567890@txt.at Carrier ATT Send Text Message Text Msg Group Last Minute Fill In

Address1 2003 S. Mission Street

Address2 Apt. 2B

City Mt. Pleasant State MI

Zip 48858 (999999-NNNNN)

County Isabella

☐ Independent Contractor (Vendor)

☐ Exempt FTE

☒ Valid Drivers License

☒ Weight Restriction Limit: 75

☒ Background Check

☐ Smoker

ACA Start Date 10/24/2016 Get First Scheduled Date

ACA Status Insurance Refused Insured

Alert Note

☐ Alert when accessing caregiver data ☐ Alert when scheduling

Choose File

Maximum Image Size 512K

Add Picture

Delete Picture

Sadie B Armstrong  
Active Caregiver

Geolocation

Caregiver Profile for Client App

Sadie is brand new, and we don't know much about her. Good luck.

# Caregiver Search Components

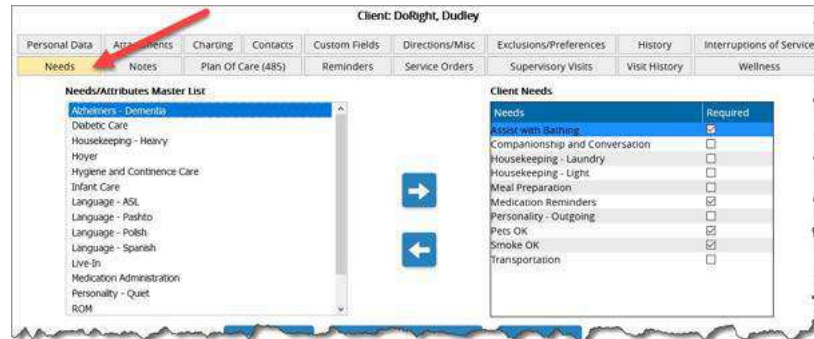
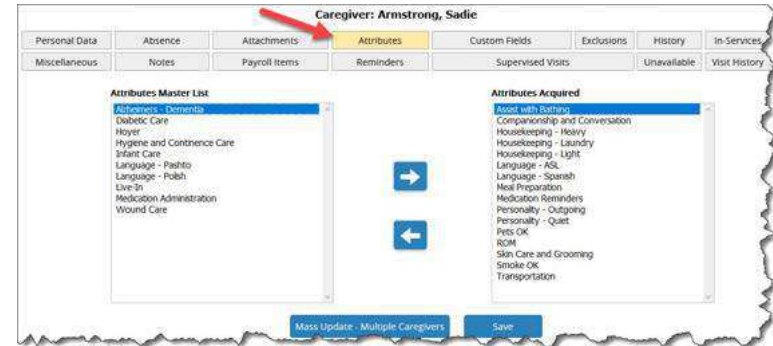
## Needs & Attributes

You'll likely want to match up clients with those caregivers who are not only available, but who also have the skills, capabilities, credentials - or "Attributes" to meet the needs of the client.

You will set up all of those pieces of criteria in the Needs & Attributes Master List. You can access these under the Client or Caregiver drop-downs in the top toolbar. (Adding a item to one list automatically adds it to the other.)



Each **caregiver** has an **Attributes** tab. Here you will specify what this caregiver's Attributes are.



Each **client** has a **Needs** tab. Here you'll designate what you need in a caregiver to work with this client, and whether it is required for a caregiver to have the attribute to meet this need.

# Caregiver Search Components

## Needs/Attributes, cont'd

A Mass Update utility is available at both the Client Needs tab, as well as at the Caregiver Attributes tab - it gives you the ability to apply a Need or Attribute to multiple clients/caregivers simultaneously. You can also find this ability under **Mass Update** from the Home Screen.

Client: Arnez, Desi

Personal Data	Attachments	Charting	Contacts	Custom Fields	Directions/Misc	Exclusions/Preferences	History	Interruptions of Service
Needs	Notes	Plan Of Care (485)	Reminders	Service Orders	Supervisory Visits	Visit History	Wellness	

**Needs/Attributes Master List**  
Alphabetical - Descending  
Assist with Bathing  
Companionship and Conversation  
Diabetic Care  
Housekeeping - Laundry  
Housekeeping - Light  
Hoyer  
Hygiene and Continence Care  
Infant Care  
Language - ASL  
Language - Pashto  
Language - Polish  
Live-In  
Medication Administration  
Personality - Quiet  
Pets OK

→  
←

**Client Needs**

Needs	Required
Housekeeping - Heavy	<input type="checkbox"/>
Language - Spanish	<input checked="" type="checkbox"/>
Meal Preparation	<input type="checkbox"/>
Medication Reminders	<input type="checkbox"/>
Personality - Outgoing	<input type="checkbox"/>
Smoke OK	<input checked="" type="checkbox"/>
Transportation	<input checked="" type="checkbox"/>

Caregiver Search    Mass Update - Multiple Clients    Save

Select Area to Update

- ☒ Caregivers - Class
- ☐ Caregivers - Classification
- ☒ Caregivers - Attributes
- ☐ Caregivers - Text Msg Group

- ☒ Client - Needs
- ☐ Client - Priority
- ☐ Client - Location ID
- ☐ Client - Sales Rep

**Recommendation:** Review your master list of Needs/Attributes: 1) Think about your clients and what they need in a caregiver; 2) think about your awesome caregiving staff, and all of the attributes/skills/ interests/capabilities they bring to the table. Add to the master list as many items as you wish to use - remove the ones you do not wish to use. Then assign to clients & caregivers as needed. Don't forget to think about items such as language needs, personality, interests, etc.



# Caregiver Search Components

## Needs/Attributes, cont'd

By default, Caregiver Search will look for available caregivers who have Attributes that match all **assigned** Needs of the client.

You can change that filter to show:

- Caregivers that have Attributes that match all of the **Required** Needs, or
- Omit the Needs/Attributes matching altogether.

If your search initially returns few caregivers, try changing to match on just the client's Required Needs - or, if you want to further widen your search, change the Needs filter to "Select None" - and base your search only on availability.

The screenshot shows the 'Caregiver Search' interface. At the top, there are tabs for 'Caregiver Search' and 'Client Visit History'. Below the tabs are buttons for 'Search', 'Export', 'Print', 'Save Search', 'Load Search', 'Send Text Message', and 'Close'. The 'Client Filters' section includes a 'Client' dropdown set to 'Brady Wayne', a 'Date From' field set to '11/27/2020', a 'Date Thru' field set to '11/27/2020', a 'Service Order' dropdown set to '-----Select-----', a 'Start Time' field set to '12:00 AM', an 'End Time' field set to '12:00 AM', and a 'Service' dropdown set to '-----Select-----'. There is also a 'Days/Week' section with checkboxes for 'Su', 'Mo', 'Tu', 'We', 'Th', 'Fr', and 'Sa', and a 'Select all days' button. A 'Needs Filter' section has three radio buttons: 'Select all Required', 'Select All Assigned' (which is selected), and 'Select None'. On the right, there is a 'Needs' table with columns 'Needs' and 'Required'.

Needs	Required
Any Attributes	<input type="checkbox"/>
Alzheimers - Dementia	<input type="checkbox"/>
Assist with Bathing	<input checked="" type="checkbox"/>
Companionship and Conversation	<input type="checkbox"/>
Diabetic Care	<input type="checkbox"/>

This is a close-up of the 'Needs Filter' and 'Needs' table from the previous screenshot. The 'Needs Filter' section shows three radio buttons: 'Select all Required' (which is selected), 'Select All Assigned', and 'Select None'. The 'Needs' table has columns 'Needs' and 'Required'.

Needs	Required
Any Attributes	<input type="checkbox"/>
Alzheimers - Dementia	<input type="checkbox"/>
Assist with Bathing	<input checked="" type="checkbox"/>
Companionship and Conversation	<input type="checkbox"/>
Diabetic Care	<input type="checkbox"/>

Only the Needs highlighted in **blue** will be filtered to in your search.

# Caregiver Search Components

## Preferred/Excluded

If a caregiver is designated as excluded (on either the Client's "Exclusions/Preferences" tab, or on the Caregiver's "Exclusions" tab) - they will NOT be returned in any searches for that client.









Preferred Caregivers for each client will always be returned at the very top of the search results - they will also be highlighted in **yellow**.

Designating which caregivers are Preferred and Excluded can help streamline your process of finding available caregivers to fill open shifts.

Client: Brady, Wayne

Personal Data	Attachments	Charting	Contacts	Custom Fields	Directions/Misc	Exclusions/Preferences	History	Interruptions of Service
Needs	Notes	Plan Of Care (485)	Reminders	Service Orders	Supervisory Visits	Visit History	Wellness	




1 to 3 of 3 Records

+ New	Caregiver	Type	Comment
  	Johnson Steve	Preferred	Wayne prefers Steve because of their mutual love for NFL.
  	Blanchard Jenny	Exclusion	Wayne said Jenny never listened to him.
  	Daniels Jack	Preferred	If Steve isn't available - Jack is the client's 2nd choice.

Column Chooser Proximity (Miles) Map Results Preferred Caregiver Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

1 to 13 of 13 Records

	Schedule	Notes	Map	Caregiver	Pref	Avail %	Distance	County	Hours	OTAlert	Pri
	Add	Add	Map	Daniels, Jack	P	100.00 %	3.35	Isabella	04:00	<input type="checkbox"/>	
	Add	Add	Map	Adams, Alicia		100.00 %	43.16	Isabella	12:10	<input checked="" type="checkbox"/>	
	Add	Add	Map	Armstrong, Sadie		100.00 %	2.10	Isabella	05:00	<input type="checkbox"/>	

# Caregiver Search Components

## Absences (Caregiver)













This tab on the Caregiver record allows you to track the caregiver's time off - whether that time was scheduled (vacation) or not (called off).

Caregiver: Adams, Alicia

Personal Data	Absence	Attachments	Attributes	Custom Fields	Exclusions	History	In-Services
Miscellaneous	Notes	Payroll Items	Reminders	Supervised Visits	Unavailable	Visit History	

Specify Dates/ Times

1 to 4 of 4 Records

+ New	Start Date	End Date	Start Time	End Time	Not Scheduled	Comments
  	12/18/2020	12/29/2020	12:00 AM	11:59 PM	<input type="checkbox"/>	Vacation
  	07/31/2019	07/31/2019	12:00 AM	11:59 PM	<input checked="" type="checkbox"/>	Alicia called early this morning - she will be out today for a funeral she indicated she just found out about last night. She may be able to work later in the day - will call the office if that is the case.
  	08/12/2016	08/12/2016	12:00 AM	11:59 PM	<input checked="" type="checkbox"/>	Called off sick.
  	06/24/2016	06/24/2016	12:00 AM	11:59 PM	<input type="checkbox"/>	

An added benefit of tracking this info ==>

Caregiver Absences Report

Status: ALL

Caregivers: (All Caregivers)

Class: All Class

From: 11/27/2020

Thru: 11/27/2020

☒ Scheduled Absences

☒ Unscheduled Absences

Print Cancel

==>

The GenSuccess Agency

Caregiver Absences

01/01/2020-11/27/2020

Caregiver	Start Date	End Date	Start Time	End Time	Comments	Unscheduled
Daniels, Jack	01/10/2020	01/10/2020	12:00 AM	11:59 PM	Jack left a message - said he won't be working today. (Called to follow up - no answer.)	<input checked="" type="checkbox"/>
Daniels, Jack	02/21/2020	02/21/2020	12:00 AM	11:59 PM	Jack's girlfriend called - Jack won't be working today - said his grandmother passed away suddenly last night.	<input checked="" type="checkbox"/>
Daniels, Jack	03/14/2020	03/14/2020	12:00 AM	11:59 PM	Rec'd a text from Jack his car won't start. Won't be working today.	<input checked="" type="checkbox"/>
Daniels, Jack	04/17/2020	04/19/2020	12:00 AM	11:59 PM	Personal days approved - wedding in TN.	<input type="checkbox"/>
Daniels, Jack	06/13/2020	06/13/2020	12:00 AM	11:59 PM	Jack called & left message - said his car won't start - will be working on it today.	<input checked="" type="checkbox"/>
Daniels, Jack	07/04/2020	07/05/2020	12:00 AM	11:59 PM	Jack called - said he's not feeling well. Won't be working today or tomorrow...	<input checked="" type="checkbox"/>

# Caregiver Search Components

## Unavailable (Caregiver)

When you are onboarding a caregiver, ask them “When are you not available to work?” - and enter those days/times at the Caregiver’s Unavailable tab.

(Example - Alicia doesn’t want to work until after church on Sunday - she also volunteers at her son’s school on Thursday morning.)







This is all taken into account during Caregiver Search.

**Caregiver: Adams, Alicia**

Personal Data	Absence	Attachments	Attributes	Custom Fields	Exclusions	History	In-Service
Miscellaneous	Notes	Payroll Items	Reminders	Supervised Visits	Unavailable	Visit History	

Quick Add

1 to 2 of 2 Records

	Day	Start Time	End Time
  	Sunday	12:00 AM	01:00 PM
  	Thursday	07:00 AM	12:00 PM

# Caregiver Search Components

## Geolocation

When running a Caregiver Search - you are able to see the distance between any caregivers returned in the search (from their home address) - and address of the client.

Ensure that your caregivers and clients have complete addresses!

Let's also take a look at searching with a Proximity filter, and the ability to view the search results on a map.

The screenshot displays the Caregiver Search interface. At the top, there is a 'Caregiver Filters +' button. Below it, a 'Column Chooser' button is visible. To the right of the column chooser is a 'Proximity (Miles)' input field, followed by a 'Map Results' button. Further right are two toggle buttons: 'Preferred Caregiver' (highlighted in yellow) and 'Caregiver with Prior visit' (highlighted in orange). Below these buttons, a note states: '(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)'. To the right of this note is a pagination control showing '<<' and '<' buttons, the text '1 to 4 of 4 Records', and '>' and '>>' buttons. A red arrow points to the '<' button. Below the pagination is a table with the following columns: Schedule, Notes, Map, Caregiver, Pref, Avail %, Distance, County, and Prior Visits. The table contains four rows of data.

	Schedule	Notes	Map	Caregiver	Pref	Avail %	Distance	County	Prior Visits
	Add	Add	Map	Jackson, Loretta		100.00 %	17.41	Isabella	0
	Add	Add	Map	Sharma, Keeva		100.00 %	11.80	Isabella	0
	Add	Add	Map	Tiger, Tony		100.00 %	15.44	Gratiot	66
	Add	Add	Map	Tunes, Tommy		100.00 %	12.18	Isabella	0



# Caregiver Search Components

## Proximity

If you'd like to limit your search results based on the distance of the caregivers home address to this client, enter the proximity.

Caregiver Filters +

Results without filtering by proximity...

Column Chooser

Proximity (Miles)

Map Results

Preferred Caregiver

Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

<< < 1 to 9 of 9 Records > >>

	Schedule	Notes	Map	Caregiver	Applicant	Pref	Avail %	Distance	County	Prior Visits
	Add	Add	Map	Daniels, Jack	<input type="checkbox"/>	P	100.00 %	3.35	Isabella	0
	Add	Add	Map	Courts, Mona	<input type="checkbox"/>		100.00 %	1.05	Isabella	0
	Add	Add	Map	Dillings, Samantha (Sam)	<input type="checkbox"/>		100.00 %	1.47	Isabella	0
	Add	Add	Map	Jackson, Loretta	<input type="checkbox"/>		100.00 %	17.41	Isabella	0
	Add	Add	Map	Klement, Penny	<input type="checkbox"/>		100.00 %	0.37	Isabella	0
	Add	Add	Map	Sharma, Keeva	<input type="checkbox"/>		100.00 %	11.80	Isabella	0
	Add	Add	Map	Simpson, Geneva	<input type="checkbox"/>		100.00 %	17.43	Isabella	0
	Add	Add	Map	Tiger, Tony	<input type="checkbox"/>		100.00 %	15.44	Gradiot	66
					<input type="checkbox"/>		100.00 %	12.18	Isabella	0

Caregiver Filters +

Same results filtered by proximity...

Column Chooser

Proximity (Miles)

Map Results

Preferred Caregiver

Caregiver with Prior visit

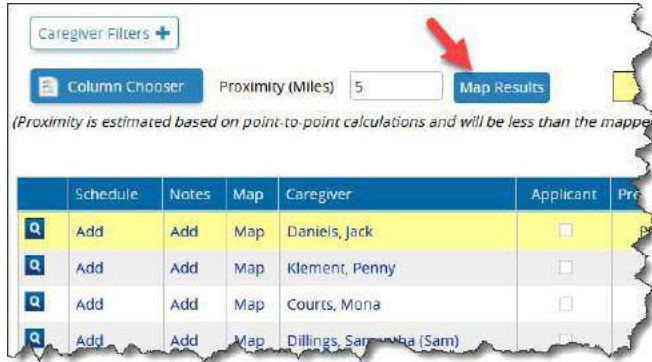
Proximity is estimated based on point-to-point calculations and will be less than the mapped distance

<< < 1 to 4 of 4 Records > >>

	Schedule	Notes	Map	Caregiver	Applicant	Pref	Avail %	Distance	County	Prior Visits
	Add	Add	Map	Daniels, Jack	<input type="checkbox"/>	P	100.00 %	3.35	Isabella	0
	Add	Add	Map	Klement, Penny	<input type="checkbox"/>		100.00 %	0.37	Isabella	0
	Add	Add	Map	Courts, Mona	<input type="checkbox"/>		100.00 %	1.05	Isabella	0
	Add	Add	Map	Dillings, Samantha (Sam)	<input type="checkbox"/>		100.00 %	1.47	Isabella	0

# Caregiver Search Components

## Map Results



Caregiver Filters +

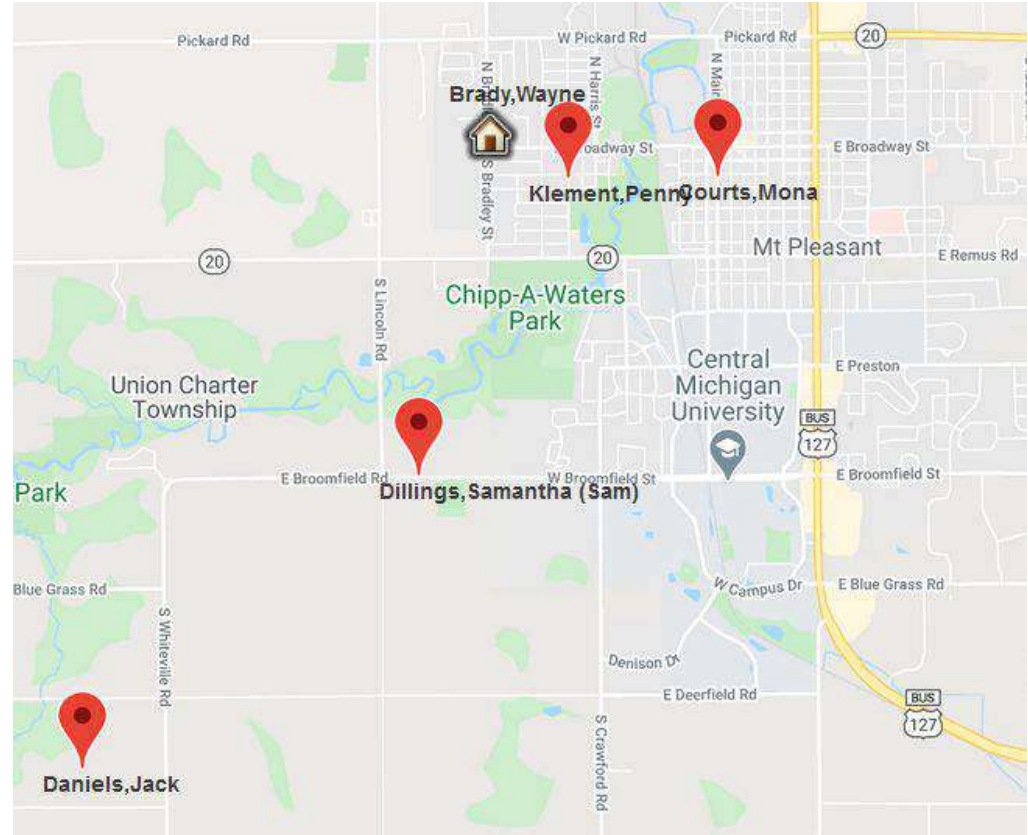
Column Chooser Proximity (Miles) 5 Map Results

(Proximity is estimated based on point-to-point calculations and will be less than the map distance)

	Schedule	Notes	Map	Caregiver	Applicant	Proximity
	Add	Add	Map	Daniels, Jack	<input type="checkbox"/>	1.2
	Add	Add	Map	Klement, Penny	<input type="checkbox"/>	1.5
	Add	Add	Map	Courts, Mona	<input type="checkbox"/>	1.8
	Add	Add	Map	Dillings, Samantha (Sam)	<input type="checkbox"/>	2.1

The house icon indicates the address of the client - the pins are the addresses of the caregivers returned in the search.

As we saw previously, clicking the word “Map” to the left of the caregiver name will bring up a map with driving directions for that specific caregiver.





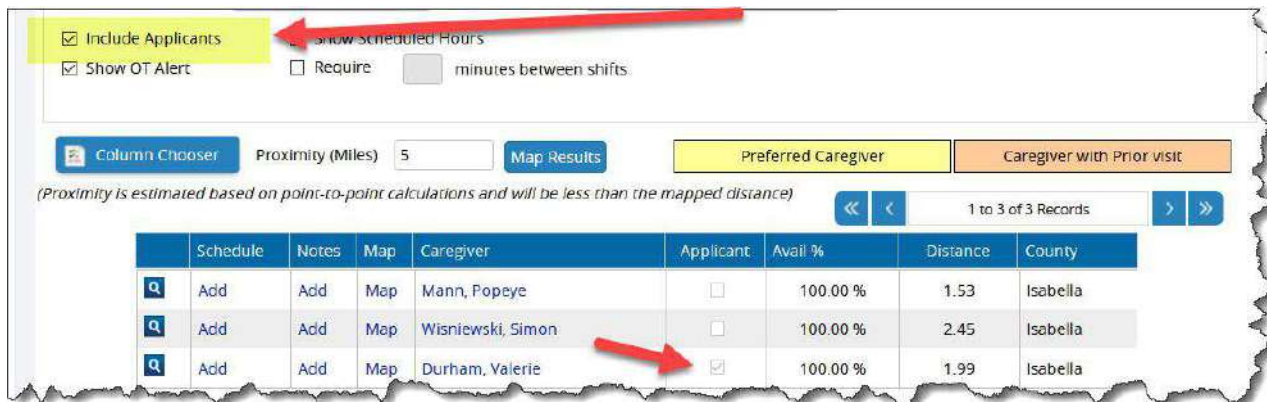
# Caregiver Search Components

## Include Applicants?

You may have some Applicants - potential caregivers - who have not yet been fully on-boarded. You can choose to include these people in your search.

When tracking Applicants, be sure to specify their Attributes, Classification, full address - and other items which could be helpful to you when including them in Caregiver Search.

Maybe you've got an Applicant who would be perfect for that client, making this a good time to complete the onboarding process and put them to work!



The screenshot shows the Caregiver Search interface. A red arrow points to the 'Include Applicants' checkbox, which is checked. Another red arrow points to the 'Applicant' checkbox in the third row of the results table, which is also checked. The interface includes a 'Column Chooser' button, a 'Proximity (Miles)' input field set to 5, and a 'Map Results' button. There are also buttons for 'Preferred Caregiver' and 'Caregiver with Prior visit'. The results table shows three rows of data, with the third row highlighted. The table has columns for Schedule, Notes, Map, Caregiver, Applicant, Avail %, Distance, and County.

	Schedule	Notes	Map	Caregiver	Applicant	Avail %	Distance	County
	Add	Add	Map	Mann, Popeye	<input type="checkbox"/>	100.00 %	1.53	Isabella
	Add	Add	Map	Wisniewski, Simon	<input type="checkbox"/>	100.00 %	2.45	Isabella
	Add	Add	Map	Durham, Valerie	<input checked="" type="checkbox"/>	100.00 %	1.99	Isabella

# Caregiver Search Components

## Column Chooser

Use the Column Chooser to display the fields you wish to view in your search results.

For each caregiver returned in the search, you will be able to Schedule, add a Note, or get their directions to the client address. You must select at least one column to display.

Column Chooser

Proximity (Miles) 15

Map Results

Preferred Caregiver

*(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)*

	Schedule	Notes	Map	Caregiver	OTAlert	Avail %	City		
	Add	Add	Map	Armstrong, Sadie	<input type="checkbox"/>	100.00 %	Mt. Pleasant	1.16	00:00
	Add	Add	Map	Klement, Penny	<input type="checkbox"/>	100.00 %	Mt. Pleasant	1.22	02:30
	Add	Add	Map	Dillings, Samantha (Sam)	<input type="checkbox"/>	100.00 %	Mount Pleasant	2.15	04:00
	Add	Add	Map	Daniels, Jack	<input type="checkbox"/>	100.00 %	Mt. Pleasant	4.18	04:00
	Add	Add	Map	Tunes, Tommy	<input type="checkbox"/>	100.00 %	Weidman	13.71	00:00
	Add	Add	Map	Tiger, Tony	<input type="checkbox"/>	100.00 %	St. Louis	13.95	00:00

Column Chooser

Selected Columns

☐ Applicant  
☒ Avail %  
☒ City  
☐ Class  
☐ County  
☒ Distance  
☐ Gender  
☒ Hours  
☒ OT Alert  
☐ Phone1  
☐ Phone2  
☐ Pref  
☐ Select All ☐ Remove All

Column Order

OT Alert  
Avail %  
City  
Distance  
Hours

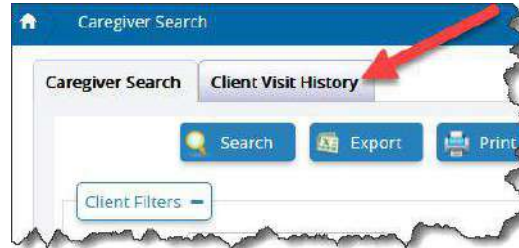
OK

Cancel

# Caregiver Search Components

## Client Visit History

The second tab at Caregiver Search displays the Visit History for the selected client. Here you can see the caregivers who have worked with this client in the past, whether that caregiver is currently active or not, along with visit information and preference/exclusion status.



A screenshot of the 'Caregiver Search' application interface, showing the 'Client Visit History' tab selected and highlighted with a red arrow. Below the tab is a table displaying the visit history for the selected client. The table has columns for First Name, Last Name, Status, Exclusions/Preferences, First Visit, Last Visit, and Total Visits. The table shows 8 records, with a pagination bar indicating '1 to 8 of 8 Records'.

First Name	Last Name	Status	Exclusions/Preferences	First Visit	Last Visit	Total Visits
Dudley	DoRight	I		09/27/2020	10/03/2020	2
Bob	Bellows	I		02/03/2020	09/18/2020	161
Sally	Brown	A		02/06/2018	11/07/2019	2
Kathryn	Maldonado	A		07/01/2019	09/30/2019	40
Kathy	Smith	A	P	11/25/2016	05/23/2017	51
Maria	Benson	I		04/18/2017	04/18/2017	1
Sharon	Andrews	I		09/02/2015	09/30/2015	28
Tony	Tiger	A		06/01/2015	08/31/2015	66

# Caregiver Search - Putting It All Together

Use one of these following ways to view your Available Shifts:

- Filter to “Available Shift” caregiver at any of the scheduling views
- View an Available Shifts report (found under Scheduling Reports)

An easy way to utilize Caregiver Search on a specific shift is to edit that shift - and click Caregiver Search.

Otherwise, you can go to Caregiver Search directly from the Home page, and enter your desired search criteria.

Edit Schedule

Schedule Edit Task Wellness Questions Client QA Visit Notes Other Expenses Charting Time / Task Signature Exceptions Screening

Date: 2/14/2020 Start: 07:00 AM End: 08:00 AM

Client: Armed, Desi Service Order: [dropdown] Require Care Notes: [checkbox]

Payor: --SELF-- Service: P-Alt Care Hourly Care Note: [dropdown]

Caregiver: (Available, Shift) Pay Item: [dropdown] Incident Report: [dropdown]

Notes: [text area]

EVV Alert: [radio] Enabled [radio] Disabled Client QA: [radio] Enabled [radio] Disabled Mileage Prompt: [radio] Enabled [radio] Disabled

Caregiver Search Delete Schedule Audit Trail



# Caregiver Search - Putting It All Together

If I came to Caregiver Search directly from a shift, it fills in the shift information for me, and knows I'm looking for someone to work with this client - on this date - at these times - and what the client's Needs are.

Otherwise, select the client, and enter dates, times, service, day of week, etc. If the client's Needs have been set up on their Needs tab, they will automatically be filtered to. Adjust the Needs Filter as needed.

Under Caregiver Filters, narrow your search and display as needed - and click Search.

The screenshot displays the 'Caregiver Search' interface with two tabs: 'Caregiver Search' and 'Client Visit History'. The 'Caregiver Search' tab is active.

**Client Filters:**

- Client:** Arnez Desi
- Service Order:** -----Select-----
- Service:** P-Att Care Hourly
- Date From:** 12/14/2020
- Date Thru:** 12/14/2020
- Start Time:** 07:00 AM
- End Time:** 08:00 AM
- Days/Week:** ☐ Su ☒ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa **Select all days**

**Needs Filter:**

- ☐ Select all Required
- ☒ Select All Assigned
- ☐ Select None

**Caregiver Filters:**

- Classification:** CNA
- Class:** All Class
- City:** (All Cities)
- County:** (All Counties)
- Gender:** (All)
- Available %:** 100%
- Text Msg Group:** (All)
- Zip:** (All)

**Search Options:**

- ☐ Include Applicants
- ☒ Show OT Alert
- ☒ Show Scheduled Hours
- ☒ Require 15 minutes between shifts

**Buttons:** Search, Export, Print, Save Search, Load Search, Send Text Message, Close, Column Chooser, Proximity (Miles), Map Results, Preferred Caregiver, Caregiver with Prior visit.



# Caregiver Search - Putting It All Together

Here are the search results:

Any of these three would be a good match for this client. They all ...

- Have the Attributes to meet the Needs of this
- Are not scheduled to be working with another client at this time
- Will have at least 15 minutes between this shift and any others this day
- Are all CNA's
- Taking this shift won't put any of them into Overtime

If you already know which one to add to the schedule, click the Add button in the first column for that caregiver.

If you wish to add a NOTE to any of these caregivers, click the Add button in the Notes column.

**Caregiver Filters**

Classification: CNA | Class: All Class | Text Msg Group: (All)  
City: (All Cities) | County: (All Counties) | Zip: (All)  
Gender: (All) | Available %: 100%

☐ Include Applicants ☒ Show Scheduled Hours  
☒ Show OT Alert ☒ Require 15 minutes between shifts

Column Chooser Proximity (Miles) Map Results Preferred Caregiver Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

1 to 3 of 3 Records

	Schedule	Notes	Map	Caregiver	Pref	Distance	Hours	OTAlert	Prior Visits	Gender
	Add	Add	Map	Dillings, Samantha (Sam)		2.15	05:30	<input type="checkbox"/>	0	F
	Add	Add	Map	Jackson, Loretta		18.95	01:30	<input type="checkbox"/>	1	F
	Add	Add	Map	Tiger, Tony		13.95	09:30	<input type="checkbox"/>	0	M

**Add Notes**

Caregiver: Dillings Samantha (Sam)

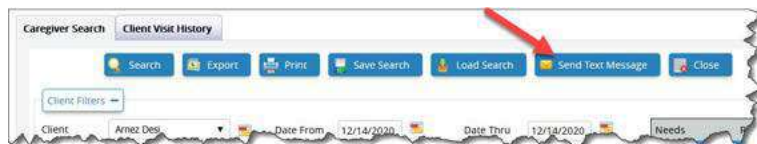
Note Type: Shift Offered

Note: 12/8 shift w/Brady offered

Save Cancel

# Caregiver Search - Putting It All Together

If you'd like to OFFER this shift to your caregivers - blast out a text message to them by clicking on "Send Text Message".



**If you have Message Center enabled:**

1. There you will see that all caregivers returned in the search are now highlighted - but you can select others, or de-select anyone. (You also have some additional filtering capabilities if you wish to filter to your own list of caregivers.)
  2. Best practice would be to document that you are offering this shift. Use a Note Type that indicates work was offered.
  3. If you would like to send a text and/or email notification to the caregiver to let them know there is a message for them in the Message Center, check the appropriate box(es).
  4. Enter a Subject Line and your message, and click Send.
- (Caregivers will receive a notification that they need to login to the mobile app to read & respond to the message.)

You can track this message and responses in the Message Center.

**NOTE: We highly recommend the Message Center to enable secure communication with your caregivers!**

**Class**  
All Class

**Classification**  
(All)

**Message Group**  
(All)

**Assigned To**  
Lynne

**Note Type:**  
Shift Offered

☒ Send Text Notification  
☒ Send Email Notification  
☒ Add to Caregiver Notes

**From**  
lynne@ldb-sys.com

**Subject**  
Need Caregiver for Shift on 12/14/20

**Body**  
Call the office - or view Available Shifts in the app to request this shift.

**Recipients:**  
☒ Caregiver ☐ Applicant  
Dillings, Samantha (Sam)  
Jackson, Loretta  
Johnson, Steve  
King, Donna  
Klement, Penny  
Maldonado, Kathryn  
Mann, Popeye  
Mertz, Ethel  
Natoli, Kimberly  
Sharma, Keeva  
Simpson, Geneva  
Smith, Kathy  
Terel, Kristina  
Tiger, Tony  
Tunes, Tommy  
☐ Select All

Recipients will view the secure message using the mobile site or app. Notification can be sent via email or text to alert them a new message is available.

**Buttons:** Send, Send/Archive, Message Status, Close



# Caregiver Search - Putting It All Together

## If you do NOT have Message Center enabled:

1. All caregivers returned in the search will be highlighted automatically - but select & de-select as desired. (You also have some additional filtering capabilities if you wish to further filter the list of selected caregivers.)
2. Enter the subject line of your text message. If you would like to - as a best practice - also add a Note to these caregivers to document that the work was offered, select the appropriate Note Type - and be sure to check the “Add to caregiver Notes” checkbox below this area. Note that the Alert Text is automatically entered for you.
3. This message will be sent to the caregivers via text - if you wish also send them an email notification, or an app notification, check the appropriate boxes at the bottom - then click Send.

See the **Mass Email Summary** of this communication by clicking on “Message Status”.

The screenshot shows the 'Send Text Message' window. On the left, a list of caregivers is displayed, with several names highlighted in blue. A red circle with the number '1' points to this list. On the right, there are several input fields: 'Classification' (set to '(All)'), 'Class' (set to 'All Class'), 'Alert Group' (set to '(All)'), 'From' (set to 'lynne@idb-sys.com'), 'Subject (30 Char Max)' (set to 'Available Shift Notification'), 'Note Type' (set to 'Shift Offered'), and 'Alert Text (130 Char Max)' (containing a pre-filled message about a shift notification). A red circle with the number '2' points to the 'Subject' field. At the bottom, there are three checkboxes: 'Send Email Notification', 'Add to caregiver Notes', and 'Send App Notification'. A red circle with the number '3' points to the 'Add to caregiver Notes' checkbox. Below these checkboxes are three buttons: 'Send', 'Message Status', and 'Cancel'.

Text messages - or any email sent to caregivers outside the Message Center are not secure.

# Caregiver Search - Putting It All Together

In this scenario, caregiver Loretta called right away and asked to take the shift, and as she's been there before, I'm going to assign the shift to her.

Click on the Add button in the first column.

That brings up the caregivers schedules for that week, with that Available Shift 'tentatively' on her calendar. To go head & put her on that shift, click on "Add Schedule" at the bottom of the 14th - OR click "Schedule All" in the lower right.

Then click Save.

One less Available Shift to fill!

Column Chooser Proximity (Miles) Map Results Preferred Caregiver Caregiver with Prior visit

(Proximity is estimated based on point-to-point calculations and will be less than the mapped distance)

1 to 3 of 3 Records

	Schedule	Notes	Map	Caregiver	Pref	Distance	Hours	OTAlert	Prior Visits	Gender
	Add	Add	Map	Dillings, Samantha (Sam)		2.15	05:30	<input type="checkbox"/>	0	F
	Add	Add	Map	Jackson, Loretta		18.95	01:30	<input type="checkbox"/>	1	F
	Add	Add	Map	Tiger, T		13.95	09:30	<input type="checkbox"/>		

Add Schedules: Jackson, Loretta

To assign all shifts from your search results click the Schedule All button

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

Client: Arnez, Desi 12/14/2020- 12/14/2020 07:00 AM- 08:00 AM (1) (Mon)

Service: P-Att Care Hourly Service Order: ☐ Require Care Notes ☐ Require Wound Notes

Caregiver: Jackson, Loretta Payroll Item: Hourly Default Care Note: Incident Report

Payor: --SELF--

Confirm Status: ☐ Confirmed ☒ Un-Confirmed EVV Alerts: ☒ Enabled ☐ Disabled Mileage Prompt: ☒ Enabled ☐ Disabled

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Hours
Dec 13	14 (Available Shift) 07:00 A - 08:00 A (1) Horton, Donald 10:00 A - 11:30 A (1.5) Add Schedule	15	16	17	18	19	1.5

OR

Close Save Schedule All

# Caregiver Search - Putting It All Together

If you've just done an intake of a new client, you do not need to first add the schedules as Available Shifts in order to use Caregiver Search.

Simply add the new client, along with their address, Service Order (if needed) and their Needs.

At Caregiver Search, select the client, and enter the date range, start & end times of the shifts, and days of the week. (Needs will be filtered to.)

Then add the Caregiver Filters you wish to use, and get the resulting list of matching, available caregivers. Choose a caregiver to fill the shift(s), and click the Add button.

Select the Service Order or Service, Payor, Payroll Item, as well as add Tasks, Wellness Questions, Notes, Other Expenses, and designate if electronic signatures are required.

Select the days to schedule, (or "Schedule All") to put the shift(s) on the caregiver calendar. Done!

**Add Schedules: King, Donna**

To assign all shifts from your search results click the Schedule All button

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

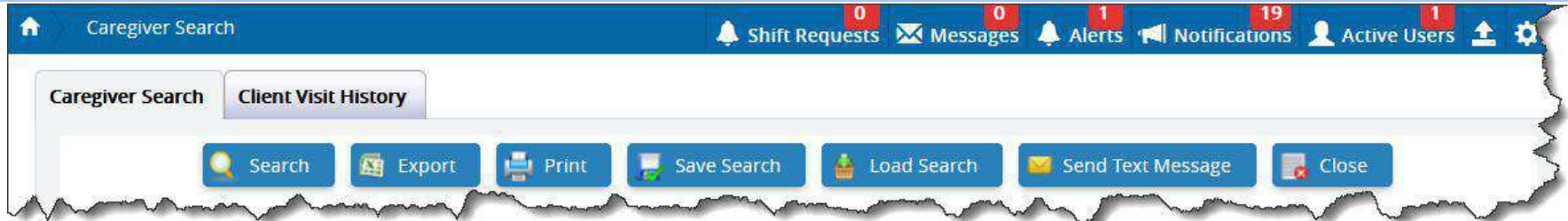
Client: Hansen, Harley 12/28/2020- 12/31/2021 08:00 AM- 11:00 AM (3) (Mon, Tue, Wed, Thu, Fri)  
Service: Adult Care Service Order: ☐ Require Wound Notes  
Caregiver: King, Donna Payroll Item: Hourly  
Payor: --SELF--

**Confirm Status** ☐ Confirmed ☒ Un-Confirmed **EVV Alerts** ☒ Enabled ☐ Disabled **Mileage Prompt** ☒ Enabled ☐ Disabled

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Hours
Dec 27	28 Add Schedule	29 Add Schedule	30 Add Schedule	31 Add Schedule	Jan 1 Add Schedule	2	0
3	4 Add Schedule	5 Add Schedule	6 Add Schedule	7 Add Schedule	8 Add Schedule	9	0
10	11 Add Schedule	12 Add Schedule	13 Add Schedule	14 Add Schedule	15 Add Schedule	16	0
17	18 Add Schedule	19 Add Schedule	20 Add Schedule	21 Add Schedule	22 Add Schedule	23	0
24	25 Add Schedule	26 Add Schedule	27 Add Schedule	28 Add Schedule	29 Add Schedule	30	0
31	Feb 1 Add Schedule	2 Add Schedule	3 Add Schedule	4 Add Schedule	5 Add Schedule	6	0
7	8	9	10	11	12	13	0

**Close** **Save** **Schedule All**

# Caregiver Search - Other Buttons



## Export

Exports the search results to XLS. It will display the same columns that you've selected using the Column Chooser.

## Print

This generates a PDF report with the search results, which can be printed.


## Save Search

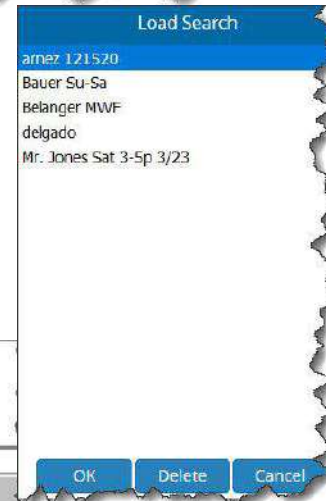
If you'd like to Save the search results, as well as all of the parameters you used to get them, this allows you to name it & save it.

## Load Search

Load up previously saved search parameters & results.

	A	B	C	D	E
1	Caregiver	Pref	Distance	Prior Visit	Gender
2	Armstrong, Sadie		1.0748	5	F
3	Daniels, Jack		4.1797	128	M
4	Dillings, Samantha (Sam)		2.1471	0	F
5	Jackson, Loretta		18.951	2	F
6	Tiger, Tony		13.9476	0	M
7	Tunes, Tommy		13.7118	0	M
8					

 The GenSuccess Agency									
Caregiver Search results for Arnez Desi									
Date Range: 12/19/2020-12/19/2020									
Time Range: 07:00AM-08:00AM									
Pref	Applicant	LastName	FirstName	Class	Phone1	Phone2	City	County	Distance
<input type="checkbox"/>	Armstrong	Sadie		MTP	456-649-8752 (c)	969-879-3156	Mt. Pleasant	Isabella	1.07
<input type="checkbox"/>	Daniels	Jack		MTP	808-422-6118	969-625-1336	Mt. Pleasant	Isabella	4.18
<input type="checkbox"/>	Dillings	Samantha (Sam)		MTP	517-364-9630	937-243-4185	Mount Pleasant	Isabella	2.15





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# Best Practices

- If your search initially comes up with a small resulting list of available caregivers, try changing some of the filters. (Example: Maybe the caregiver doesn't have ALL of the Attributes needed, but perhaps they at least have all of the REQUIRED attributes needed.)
- Track caregiver time off (whether scheduled or not) in their Absence tab.
- Track times that the caregiver is not available to work in their Unavailable tab.
- When searching, be sure to take into account the amount of time a caregiver may need between shifts.
- When entering Applicants, be sure to complete all fields that will be taken into consideration in Caregiver Search.
- If the client has a preferred caregiver, or a caregiver that they wish to "never see again", designate them as such on the client's Exclusions/Preferences tab.
- If a caregiver has indicated that they would prefer not to work with a specific client, designate that client on the caregiver's Exclusions tab.
- When offering work to caregivers via Caregiver Search, be sure to document that you've done so, using an appropriate Note Type. If work is refused, document that, as well! You never know when this documentation may come in handy!)
- Enable the Message Center, so that all work offered messages sent via Caregiver Search are secure.



# Read More About It



Check out the user documentation on the following **topics** to learn more. Use the search bar at the top of the Help area & look for these...

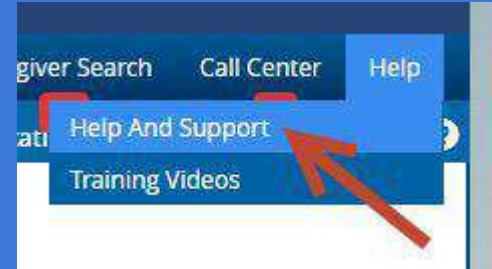
- Caregiver Search
- Needs and Skills
- Master Lists (Class, Classification, Note Types, Text Message Groups)
- Message Center

# 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](http://www.idb-sys.com) OR [www.homecaresoftware.com](http://www.homecaresoftware.com)
- Email: [support@idb-sys.com](mailto: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://HomecareSoftware.com) | Reach us via LiveChat

 [info@homecaresoftware.com](mailto:info@homecaresoftware.com)

**989-546-4512**

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