



# Rhode Island EOHHS Electronic Visit Verification (EVV) Program Provider Training – Phase I

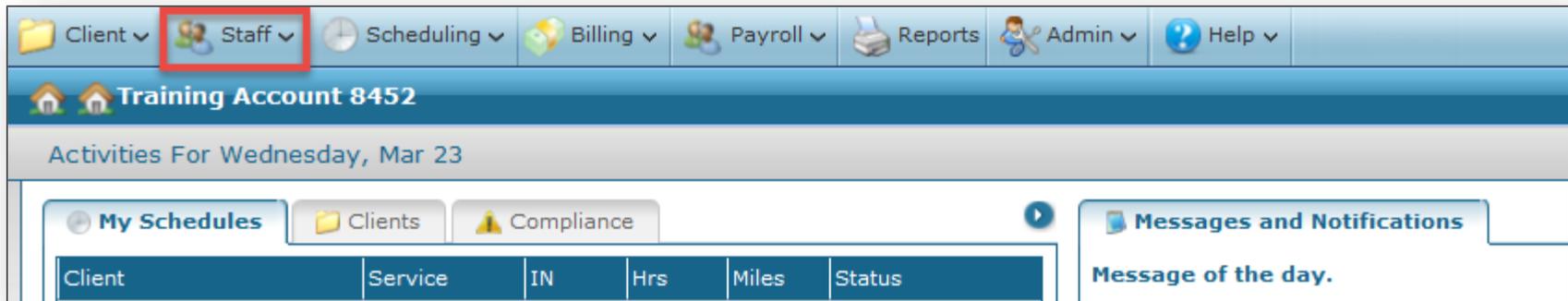
## *Staff Module*



# Agenda

- ⌘ Accessing Staff module
- ⌘ Staff search functions
- ⌘ Adding new staff
- ⌘ Staff record navigation
- ⌘ Modify, Activate / De-activate Staff Members
- ⌘ User Security
- ⌘ Speaker Verification

# Accessing the Staff Module



- ⚡ Clicking the Staff icon on the menu bar opens the search screen.
- ⚡ By default, search parameters will be set for Active Field Staff.
- ⚡ Additional search filters are available.

# Staff Search Filters

- ⚡ Caregivers are designated as Field staff
- ⚡ Office staff are designated as Users
- ⚡ Use appropriate filters to reduce the results list
- ⚡ Use the Position filter to search by job role

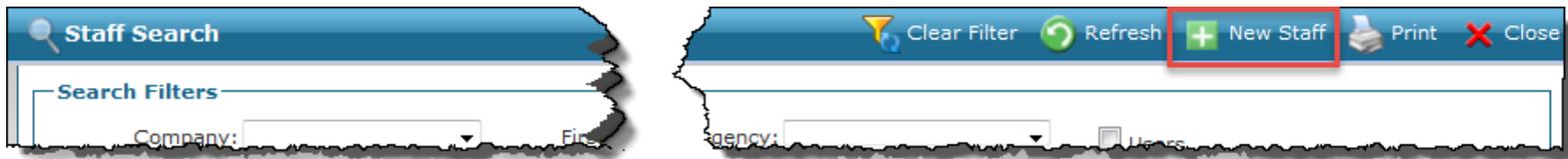
### Staff Search

**Search Filters**

Company: <input type="text"/>	First Name: <input type="text"/>	Agency: <input type="text"/>	<input type="checkbox"/> Users
Location: <input type="text"/>	Last Name: <input type="text"/>	Position: <input type="text"/>	<input checked="" type="checkbox"/> Field Staff
Staff Manager: <input type="text"/>	Agency ID: <input type="text"/>	Language: <input type="text"/>	<input type="checkbox"/> Contractors
Coordinator: <input type="text"/>	SSN: <input type="text"/>		<input type="checkbox"/> Clinical Manager
Status: <input type="text" value="02- Active"/>	ZIP: <input type="text"/>		<input type="checkbox"/> Non-Compliant Staff
Reason: <input type="text"/>	Team: <input type="text"/>		<input type="button" value="Reassign Manager/Coordinator"/>

# Adding New Staff

- 🌀 To enter new staff, click the **New Staff** button on the Staff search screen...a New Staff Wizard will open:



- 🌀 Minimum Data needed to enter a new staff member:
  - First Name
  - Last Name
  - Social Security Number
  - Position
- 🌀 The New Staff Wizard will also ask for Company, Location and Admit type.
  - Making selections on these screens limit staff to only those items selected
  - Click **Next** without selecting for maximum staff availability/flexibility

# New Staff Wizard – Personal Information



⚡ Name is required. Phone is recommended.

**New Staff Wizard**

**Name And Other Information**

Enter Name And Other Information For The New Staff Member.

Type:

Title:

\* First Name:

Middle Init:

\* Last Name:

Suffix:

**Other Information**

SSN:

Home Phone:

# New Staff Wizard – Company & Location

- ⚡ Selecting Company and/or Location is optional.
- ⚡ If selections are made the staff will only be able to work in the selected company/location
- ⚡ Leave blank to allow the staff to work across all companies and locations.

**New Staff Wizard**

**Company**

Which Company will this Staff Member be associated with?

ID	ID	Description
7	5805	RI Agency

**New Staff Wizard**

**Location**

Which Location will this Staff Member be associated with?

ID	Description
P	Providence
W	Warwick

# New Staff Wizard – Admission Types

- ⚡ Admission Types may include options from other payers in addition to Rhode Island
- ⚡ Selecting Admission Type will limit the staff to only working those types selected

**New Staff Wizard**

**Admission Type**

Which Admission Types can this Staff Member be associated with?

ID	Description
MC1	CORE
MD3	DEA Co Pay Level 1
MD4	DEA Co Pay Level 2
MD1	DEA Community Home Care Program
MH1	Habilitation
MB3	HCBS
MP1	PREVENTIVE

# New Staff Wizard - Position



- Select the appropriate position for the staff (can only select one position)

**New Staff Wizard**

**Position**

What Position will this Staff Member hold?

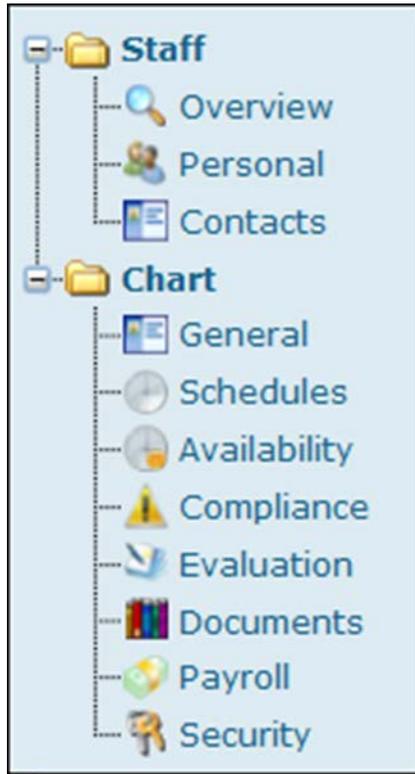
<u>ID</u>	<u>Description</u>
CNA	Certified Nuring Assistant
HMK	Homemaker
LPN	Licensed Practical Nurse
OFC	Office Staff
RN	Registered Nurse

# New Staff Wizard - Position



- ⚡ Users with the position of **Office Staff** and permissions of **System Administrator** have additional responsibilities of:
  - Registering field staff for EVV voice print recognition
  - Assign security permissions to users
  - Manually correct/confirm exception visits
- ⚡ Limit of **two** System Administrators per database.
- ⚡ Use **Office Staff** for system Users not involved with System Administrator duties.

# Staff Record Navigation



- ⚡ Staff profile organizes information into folders for easy navigation
- ⚡ Staff folder focuses on personal and demographic information
- ⚡ Chart folder focuses on work related information

# Staff Folder > Overview Screen



The Overview screen provides a summary of information from other screens in the staff record.

**Halliday, Payton** Save Close

- Staff
  - Overview**
  - Personal
  - Contacts
- Chart
  - General
  - Schedules
  - Availability
  - Compliance
  - Evaluation
  - Documents
  - Payroll
  - Security
- Training
  - In-Service
  - Training

**Personal**  
Halliday, Payton  
26 Harbor Park Drive  
Port Washington ,NY 11050

**Employment and Other Dates**  
Hire Date: 01/01/2014  
First Day Worked:  
Released Date:  
Re-Hire Date:  
Born: 11/07/1966

**Compliance**  
Compliant: Yes  
Thru: 12/31/2055

**Contacts**  
**Emergency**  
Halliday, James  
Home:(516) 555-1212  
Mobile:(917) 555-1212

**Recent/Upcoming Events**

**Links**

**Other Notes/Comments**

# Staff Folder > Personal Screen

- ⚡ Staff address (can be used for proximity searches when scheduling)
- ⚡ Language (can be matched to client needs when scheduling)
- ⚡ Entering the ZIP code automatically fills in City, State and County

Halliday, Payton Save Close

- Staff
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  - Training

**Name**

Title:

First Name:

Middle Init:

Last Name:

Suffix:

**Other Information**

Birthdate:

SSN:

Marital:

Gender:

Language:

Ethnicity:

**Current Address**

Name:

Address:

Apt.:

City:

State:  Zip:

County:

Region:

Type:

Evacuation Zone:

**Phone Numbers, Etc.**

Home:

Mobile:

Work:  Ext

Fax:

Email:  Mobile:

**Images (0/0)**



**Clients Excluded from Staff**

Client Name	Other ID	Exclusion Type	Reason for Exclusion



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13

# Staff Folder > Contacts Screen

- Add as many contacts as available, designating type of contact, relation to staff and contact information.

The screenshot displays the 'Contacts' screen for staff member 'Halliday, Payton'. The interface features a sidebar with navigation options and a main area with a table of contacts. A modal window is open, showing a form for adding or editing a contact. The form includes fields for Name, Current Address, Other Information, and Phone Numbers, Etc.

Name	Home Phone	Mobile Phone	Work Phone
EMR Halliday, James	(516) 555-1212	(917) 555-1212	

**Contact for staff Halliday, Payton**

**Name**

Title:

First Name: James

Middle Init:

\* Last Name: Halliday

Suffix:

**Other Information**

Type: Emergency

Relation: Spouse

**Current Address**

Name:

Address: 26 Harbor Park Drive

City: Port Washington

State: NY Zip: 11050-

County: Nassau

Type:

Evacuation Zone:

**Phone Numbers, Etc.**

Home: (516)555-1212

Mobile: (917)555-1212

Work: - Ext

Fax: -

Email:  Mobile:

# Chart Folder > General Screen

- ⚡ The General screen contains work related information
- ⚡ The Santrax ID is entered by the caregiver to identify themselves during the call process.
- ⚡ The Hire Date is populated when the staff is made Active in the Employment Status panel

**Halliday, Payton** [Save] [Close]

**Staff**

- Overview
- Personal
- Contacts
- Chart**
- Schedules
- Availability
- Compliance
- Evaluation
- Documents
- Payroll
- Security
- Training
- In-Service
- Training

**Agency Designations**

Position: Homemaker  
Home Location: [Dropdown]  
Agency ID: 012106  
Santrax ID: 012106  
API: [Text]  
NPI: [Text]  
Hire Date: 01/01/2014  
First Day Worked: [Text]  
Released Date: [Text]  
Re-Hire Date: [Text]  
Staff Signature: [Text]

**Managers / Etc.**

Staff: [Dropdown]  
Manager: [Dropdown]  
Coordinator: [Dropdown]  
Team: [Dropdown]

Staff Manager    Marketer    Coordinator  
 Clinical Manager    Contractor

**Employment Status**

02- Active [Dropdown]  
As Of: 08/18/14

**Contractor Information**

Agency: [Dropdown]

**Other Information**

Class: [Dropdown]  
Military: [Dropdown]  
Transportation: [Dropdown]  
Referral: [Dropdown]

**Companies** [Add] [Remove]   **Locations** [Add] [Remove]   **Admission Types** [Add] [Remove]

## ⚡ Coordinators

- Office Staff assigned to receive email alerts for late visits
- Assigned to clients in the client record

## ⚡ Staff Managers

- Above Coordinators in the SPM (Santrax Payor Management)
- Receive higher level alerts
- Managers are linked to Coordinators in User Staff record

Managers / Etc.

Staff Manager: Owens, Dana E. ▼

Coordinator: ▼

Team: ▼

Staff Manager       Marketer       Coordinator

Clinical Manager       Contractor       MCO Worker

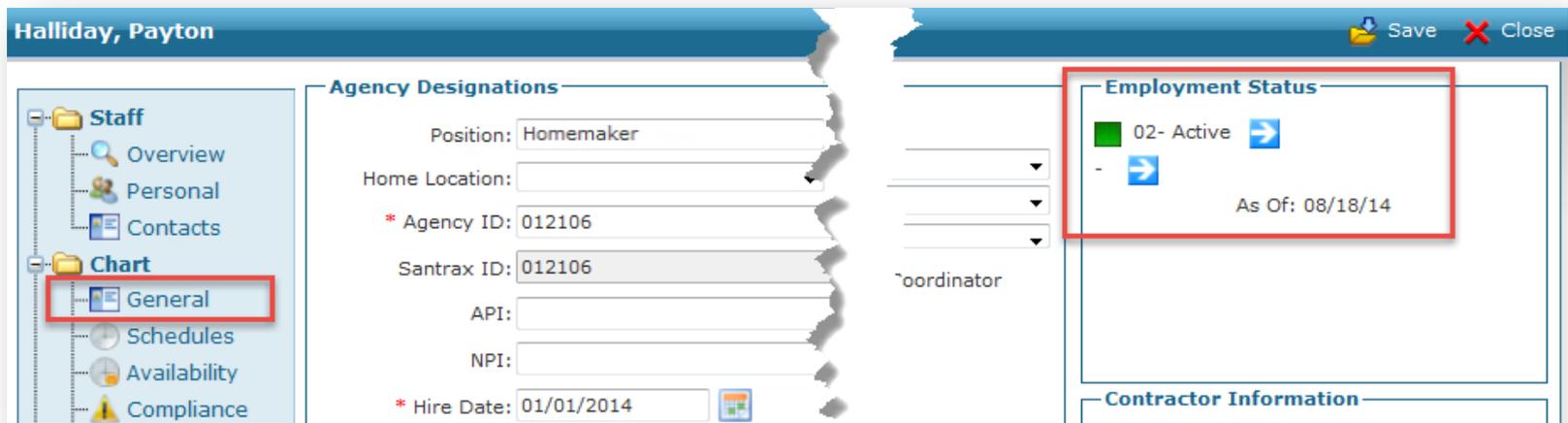
Santrax Code: max

⚡ Coordinator & Managers require a Santrax code. Use any 3 – character alphanumeric code.

⚡ Coordinators and Managers also require an email address on the **Personal** screen.

# Chart Folder > General Screen

- 🌀 New staff will appear with a status of **01-Recruit**.
- 🌀 Blue arrow next to status changes status.
- 🌀 Hire Date is set when staff is made Active.
- 🌀 Blue arrow below the status adjusts the effective date of a status change.



# Chart Folder > Schedules Screen



- ⚡ Staff's assigned schedules
- ⚡ Schedules can be filtered for a specified date range
- ⚡ Schedules can be edited from this screen

Halliday, Payton Save Close

**Staff Information**

Address: 26 Harbor Park Drive    City: Port Washington    State: NY    Zip: 11050  
Home:    Mobile:    Work:

**Staff Schedules**

Date From: 03/21/2016    Date To: 03/27/2016     Hide Cancelled Events

Page size: 20    6 items in 1 pages

Date	Client	Chart ID	P/1	Pos	Service	EC	P/1	INP	OUTP	P/1	TZ	HrsP	IN	OUT	Hrs	Supplies	Status	PRN	Comments
03/21/16-Mon	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1			1	0	01- Pending		
03/22/16-Tue	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1			1	0	01- Pending		
03/23/16-Wed	McQuire, Claude	HOU-0201693-SCB	P	HHA	17HC	DEF	P	16:00	17:00	P	C	1			1	0	01- Pending		

# Chart Folder > Compliance



- ⚡ The only staff positions that require Compliance are: CNA, RN and LPN.
  - License information needs to be entered once.
- ⚡ To enter the License #:
  1. Click on the Compliance link under the Chart folder in the staff record
  2. Double-click License Number compliance item
  3. Enter a completion date
  4. Enter the license number in the Comments area
  5. Save and close
- ⚡ Office staff will appear as non-compliant (**red on Staff Search results**) until the Compliance tab is opened in the Staff record
- ⚡ Once the Compliance screen is opened, staff will change to black in the Staff search results. No value need to be entered.

# Chart Folder > Security Screen

- ⚡ The Security screen is used to grant User access
  - User must have the 'User' checkbox selected, and have initials (3 character), username and password designated.
  - A 'Set Password' button is displayed upon saving username
- ⚡ Access is determined by Group Membership
  - Choose Admin for Office Staff who do both scheduling and billing.
  - Only System Administrators will be able to grant user access

**System Login Privileges**

This Staff Member can log into the system as User.  
Initials: \_\_\_\_\_  
Username: \_\_\_\_\_

This User is a System Administrator.

**Unique Permissions**

Section	Permit	Enable	Add	Edit	Delete	Admin
A/R	In Collection	<input type="checkbox"/>				
Billing	Billing	<input type="checkbox"/>				
Billing	Episode Tracker	<input type="checkbox"/>				
Billing	Export	<input type="checkbox"/>				
Billing	GL Export	<input type="checkbox"/>				
Billing	Invoices	<input type="checkbox"/>				
Billing	Master Rates	<input type="checkbox"/>				

**Group Memberships**

Name
------

**Recent Logins**

Message	Timestamp
---------	-----------

# Speaker Verification

Speaker Verification captures the caregiver's voiceprint on the Santrax call and compares it to a pre-recorded voiceprint to help agencies ensure the recipient is receiving the proper services:



✓ **Right Employee**



✓ **Right customer**



✓ **Right Service**



✓ **Right Time**

# Speaker Verification



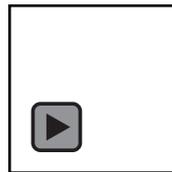
The Speaker Verification setup process begins with:

- ⚡ The System Administrator contacting Sandata Customer Care to receive their enroller ID
- ⚡ The System Administrator then completes the self enrollment process in order to enroll others
- ⚡ Caregivers come into the office to complete their enrollment
- ⚡ To ensure optimal conditions for speaker verification:
  - Speak clearly
  - Speak at your normal pace
  - Speak in your normal voice
  - Use the handset when making the call
  - Try to avoid noisy environments

# Speaker Verification - Supervisor Enrollment



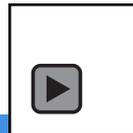
1. Dial the toll free number assigned to your agency.
2. Enter your supervisor ID
3. Press 2 to indicate that you will be enrolling your voice.
4. Santrax will advise you that you are about to begin the enrollment process. In order to register your voiceprint, you will be asked to repeat a very simple phrase 3 times: **“At Santrax my voice is my password”**
5. Hang up



# Speaker Verification – Caregiver Enrollment



1. The Supervisor must call the toll free number assigned to your agency.
2. Supervisor enters their Supervisor ID, followed by the pound (#) key.
3. Supervisor presses 2 to start the enrollment process.
4. Santrax will ask the supervisor to verify his identity repeating “At Santrax, my voice is my password”. Santrax Speaker Verification will verify the voiceprint of the supervisor.
5. The Supervisor must then enter the Santrax ID of the caregiver being enrolled.
5. The Supervisor now hands the phone to the caregiver. The system will ask the caregiver to record his voiceprint by repeating: “At Santrax, my voice is my password”. This will be repeated 3 times.
6. Once the caregiver has been successfully enrolled, they press the pound (#) key to perform a test call.
7. The supervisor will be able to verify the result of the test call by pressing 1 and reviewing the results of the test call.
8. Hang up to conclude the enrollment process or press 3 to enroll another caregiver.



# Speaker Verification - Confirming Enrollment



- ⚡ The caregiver enrollment can be confirmed by running:
  - The Speaker Verification Enrollment Status Report

**Note:** It is important to review either of the above reports immediately after enrolling an agency worker, before he or she leaves the office, to ensure they were successfully enrolled.

# What You Have Learned

- ⚡ Accessing the Staff Module and Search Filters
- ⚡ Entering New Staff:
  - New Staff Wizard and minimum data required
- ⚡ Accessing and viewing the Staff Profile screens
- ⚡ System Administrator user and permissions:
  - Register field staff for Voice Recognition
  - Assign Security permissions to users
  - Manually confirm visits
- ⚡ Coordinators and Manager permissions
- ⚡ Using Compliance
- ⚡ Speaker Verification Enrollment



# DEMONSTRATION

- Search for Staff
- Enter New Staff
- Change Staff Status

