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
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
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
Name is required. Phone is recommended.
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 – 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

<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MC1</td>
<td>CORE</td>
</tr>
<tr>
<td>MD3</td>
<td>DEA Co Pay Level 1</td>
</tr>
<tr>
<td>MD4</td>
<td>DEA Co Pay Level 2</td>
</tr>
<tr>
<td>MD1</td>
<td>DEA Community Home Care Program</td>
</tr>
<tr>
<td>MH1</td>
<td>Habilitation</td>
</tr>
<tr>
<td>MB3</td>
<td>HCBS</td>
</tr>
<tr>
<td>MP1</td>
<td>PREVENTIVE</td>
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</tbody>
</table>
Select the appropriate position for the staff (can only select one position)
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.
The Overview screen provides a summary of information from other screens in the staff record.
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
Add as many contacts as available, designating type of contact, relation to staff and contact information.
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.
Chart Folder > General Screen

- **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

- **Coordinator & Managers require a Santrax code. Use any 3-character alphanumeric code.**

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