



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

Scheduling Module



Agenda

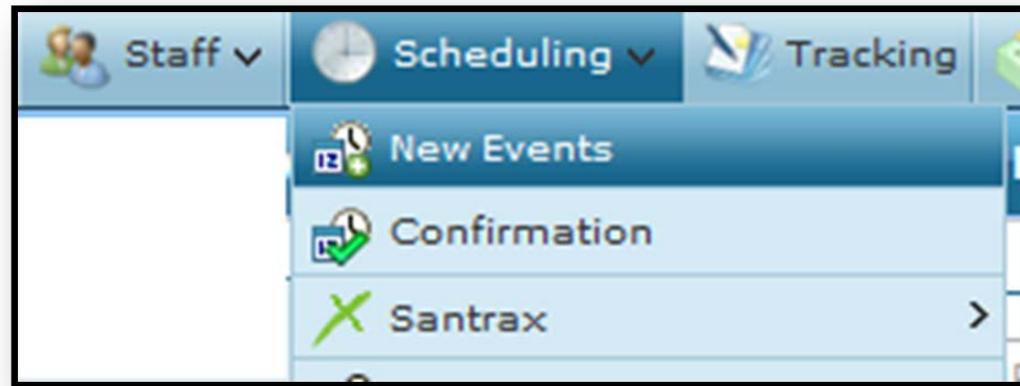
- ⚡ Creating Schedules
- ⚡ Searching for Schedules
- ⚡ Editing Schedules

CREATING NEW SCHEDULES



New Events

- ⚡ Creating schedules is done from the New Events Screen
- ⚡ To access the New Events screen, hover over the **Scheduling** icon and then click **New Events**.



Note: Schedulers should review authorizations before using the New Events screen.

New Events Screen

The New Events screen is designed to be populated from left to right and top to bottom.

- **Frequency** (single event, days of the week)
- **Dates**
- **Client** (filtered based on Service)
- **Staff** (filtered based on Service and Client)
- **Service** (including Bill and Pay Type)
- **Times** (military time)

The screenshot shows the 'New Events' screen with the following sections:

- Frequency:** Radio buttons for PRN Visits, Single Event, Ordered Frequency, and Recurring Every... (set to 0 Days). The 'By Weekday' section has checkboxes for Mon, Tue, Wed, Thu, Fri, Sat, and Sun.
- Date(s):** Begin and End date fields, both set to 04/22/2016.
- Service:** Service, Bill Type, and Pay Type dropdown menus.
- Times:** Two empty time input fields.
- Event Code(s):** A dropdown menu showing 'DEF-Default'.
- Status, Company, Etc.:** Status (01- Pending), Location, Company, PoS (01- Patients Home), Shift Group, and PoS Direction (To, From, N/A).
- Client(s):** A dropdown menu.
- Staff:** A dropdown menu.
- Authorizations:** A table with columns: Auth Ref No, Service, EC, Max, Remaining, Begin Date, End Date, Limit By, Max for Week.

New Events Process

1. Select the Frequency.
2. Select the date or date range to be scheduled.

Frequency

PRN Visits

Single Event

Ordered Frequency

Recurring Every...

0

Days

By Weekday

Mon Fri

Tue Sat

Wed Sun

Thu

1

Date(s)

Begin: 04/22/2016

End: 04/22/2016

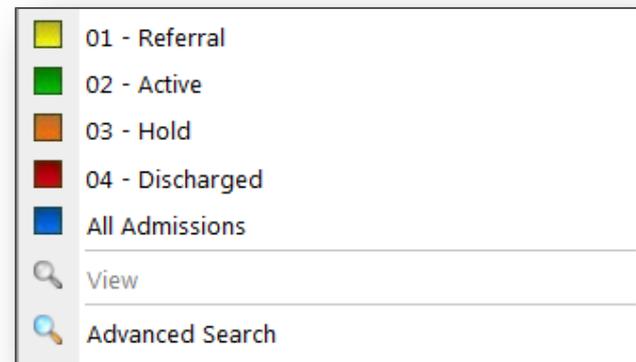
2

New Events Process

3. Select a **Client** (Service, Bill type and Pay type will populate).
 - Type the name into the Client field



- Click the status square next to the field to use the Advanced search options.



01 - Referral
02 - Active
03 - Hold
04 - Discharged
All Admissions
View
Advanced Search

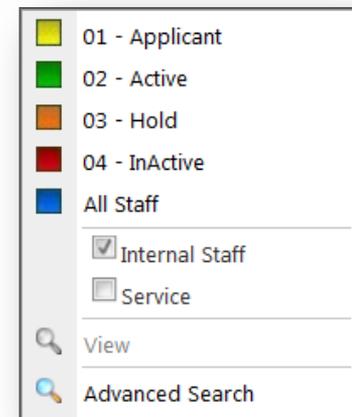
New Events Process

4. Select a **Staff** (caregiver)

- Type the name into the Staff field.
- The Staff field can be left blank if the caregiver has not yet been identified.



- Click the status square next to the field to use the Advanced search options.



New Events Process

5. Enter the start and end times.
6. Enter the Event Code, if needed, selecting the Event Code matching the authorization.
7. Remove unwanted Event Codes by selecting and clicking the red **X** to remove.

Times: 13:00 14:00 5 7

* Event Code(s) + X

DEF-Default 6

ZZ- Default

New Events Process

- After all options have been set, click **Add** to preview the schedules.



- Boxes next to schedule line indicates if schedules have conflicts (e.g. selected staff has overlapping assignment)

	Date	Client	Staff	Service	EC	IN	OUT	Duration	Status	Comments
	08/25/2009-Mon	A, Roe		HHA	09-Regul	10:30	12:30	2	01- Pending	
	08/20/2012-Mon	A, Roe		HHA	09-Regul	10:30	12:30	2	01- Pending	

- If there are *no* conflicts, click **Commit** to save schedules to the database.

DEMONSTRATION – NEW EVENTS

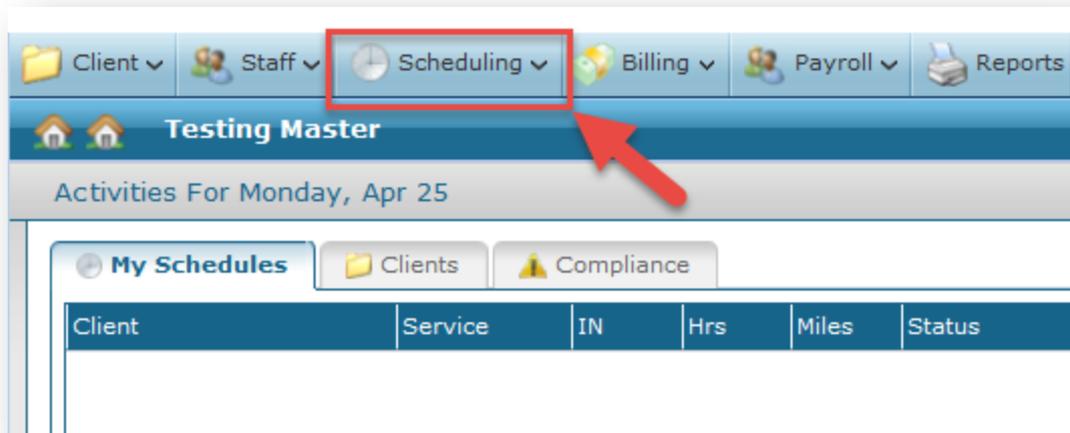
- Creating Schedules
- Checking for Conflicts
- Committing Schedules



SCHEDULING OVERVIEW SCREEN

Scheduling Overview

- Click the **Scheduling** button in the menu bar to open the **Scheduling Overview** screen.
- The **Scheduling Overview** screen is used to view or edit an existing schedule.



Search Filters

- ⚡ Client or Staff
- ⚡ Branch Location
- ⚡ Coordinator, Managers
- ⚡ Status
- ⚡ Service or Position
- ⚡ Date Range
- ⚡ Day of the Week
- ⚡ Unassigned (no staff)

Scheduling: Overview ClearFilter Refresh Add Print Close

Search Filters:

Client: → ×

Admission: ▾ ■

Staff: ▾ ■

Company: ▾ Position: ▾

Location: ▾ Agency: ▾

Admit Type: ▾ Service: ▾

Coordinator: ▾ Event: ▾

Region: ▾ Team: ▾

Status: ▾ MRN #:

Primary Payor: ▾ Payor #:

Clinical Manager: ▾

Staff Manager: ▾

Date From: 03/21/2016 📅

Date To: 03/21/2016 📅

Time In: 🕒

Time Out: 🕒

Mo Tu We Th Fr Sa Su

Santrax Calls Show Selected

Unassigned

Hide Cancelled Events

Filter For Client *or* Staff

March 2016

S	M	T	W	T	F	S
28	29	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	29	30	31	1	2
3	4	5	6	7	8	9

Sorting Results



- ⚡ Clicking any column header sorts the results by that column.
- ⚡ Clicking a second time reverses the sort order

Date	Client ▲	Chart ID
07/02/13-Tue	Adams, Abigail	BR-0000058-R07
07/02/13-Tue	Adams, Abigail	BR-0000058-R07
07/03/13-Wed	Adams, Abigail	BR-0000058-R07
07/03/13-Wed	Adams, Abigail	BR-0000058-R07
07/02/13-Tue	Boyd, Manny	BR-0000001-R07
07/02/13-Tue	Boyd, Manny	BR-0000001-R07
07/03/13-Wed	Boyd, Manny	BR-0000001-R07

Schedule Status Colors



- In the results list, the Status column will be highlighted with a status color.

Page size: 100 160 items in 2 pages

Date	Coordinator	Client	Chart ID	Staff	P/1 Pos	Service EC	P/1 INP	OUTP	P/T TZ	HrsP IN	OUT	Hrs	Supplies	Status	
03/01/16-Tue		Martin, Christ	HOU-0201603-TCB	Coleman, Bill	P HHA	17HC DEF	P 07:00	08:00	P C	1		1	0	10- Cancelled	
03/01/16-Tue		Castalano, Mi	HOU-0201607-TCB	Campbell, An	P HHA	17C DEF	P 07:30	08:30	P C	1	07:30	08:30	1	0	02- Confirmed
03/01/16-Tue		Matin, Gloria	HOU-0201608-TCB	Edwards, Este	P HHA	17HC DEF	P 07:30	08:30	P C	1		1	0	09- Hold	
03/01/16-Tue		Cain, Madelin	HOU-0201626-TCB	Pearce, Erica	P HHA	17C DEF	P 07:30	10:00	P C	2.5		2.5	0	01- Pending	
03/01/16-Tue		Brill, Joyce	HOU-0201610-TCB	Rivera, Olivia	P HHA	HHA DEF	P 08:00	09:00	P C	1	07:45	08:45	1	0	02- Confirmed

Status	Color
Pending	Grey
Confirmed	Green
Hold	Orange
In Progress	Pink
Cancelled	Red

Opening the Schedule Detail

To open the Schedule Detail:

- Double-click the schedule line item in the **Results** –OR–
- Right-click on a schedule line and choose **Open**.

Date	Client	Chart ID	Staff	Pos	Service	EC
07/02/13-Tue	Boyd, Manny	BR-0000001-R07	Gay, Tasha	HHA	T1004	ZZ
07/02/13-Tue	Webb, Charlene	BR-0000003-R07	Ca			ZZ
07/02/13-Tue	Adams, Abigail	BR-0000058-R07	Ca			ZZ
07/02/13-Tue	McKinley, Hamiltc	MAR-0000002-R07	Cl			ZZ
07/02/13-Tue	Adams, Abigail	BR-0000058-R07	Ca			ZZ
07/02/13-Tue	McKinley, Hamiltc	MAR-0000002-R07	Cl			ZZ
07/02/13-Tue	Webb, Charlene	BR-0000003-R07	Ca			ZZ

Open

Select all

Unselect all

View

Edit

Copy forward

Refresh rates

Viewing Schedule Detail

Calls

Status

Documents:0
Supplies
Call Log:1
Tasks:0
Late/Missed Visit Handling

General

Date: 07/06/2011 - Wed

Service: T1021- Home Health Aide

Company: Company 7

Location: Location M

PoS: [dropdown]

PoS Direction: To From N/A

Event Code(s): GY- Dual Eligible

Comments: [text area]

Status

Status: 03- In Process

Times

Proposed: 11:56 12:50 = 0.9 hrs

Santrax: 11:56 [] = 1 hrs

Adjusted: 11:56 12:50 = 1 hrs

Associated Totals

Proposed Miles: 0.00 Actual Miles: 0.00

Miles: 0.00 TT Bill: 0

Supplies: \$0.00 TT Pay: 0

Service

Schedule

Clients

A, Sandra - M0000009057-HH

A, Sandra.M152484905 Bill As: 02- Visit Override

Event	Type	Quantity	Rate	Bill Amt	Copay	Status
GY	02 - Visit	1.00	\$17.46	\$17.46		04 - Billed

Staff

D, Elizabeth - 00026-HHA

D, Elizabeth.00026.H Pay As: 02- Visit Override

Event	Type	Quantity	Rate	Pay Amt	Status
GY	02 - Visit	1.00	\$0.00	\$0.00	02 - Confirmed

Client

Staff

Save
Close

DEMONSTRATION – SCHEDULING OVERVIEW

- Search Filters
- Sorting search results
- Schedule Details



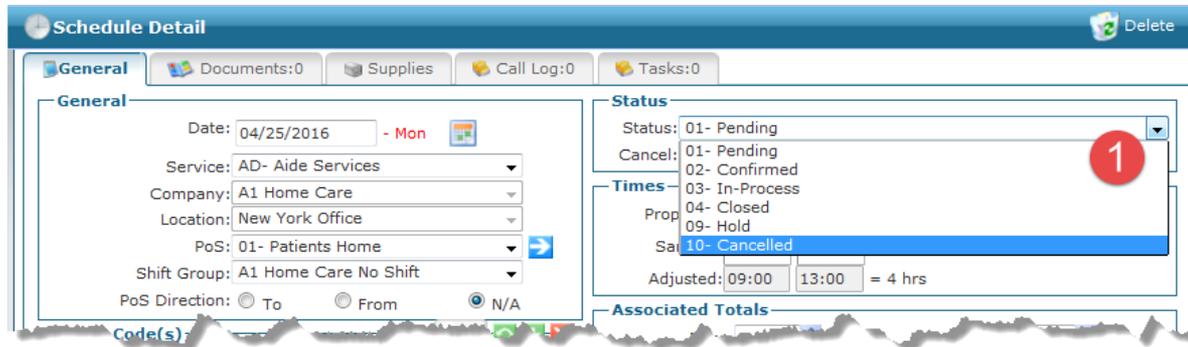
EDITING SCHEDULES

Individual Schedule Edit – Times

- ⚡ Opening the Schedule Detail allows for editing the individual schedule.
- ⚡ To adjust the schedule time, update the **Proposed Time** fields and Save.

Individual Schedule Edit – Changing Caregiver

- To change the scheduled caregiver:
 1. Change the schedule Status to Cancelled.



Schedule Detail [Delete]

General Documents:0 Supplies Call Log:0 Tasks:0

General

Date: 04/25/2016 - Mon

Service: AD- Aide Services

Company: A1 Home Care

Location: New York Office

PoS: 01- Patients Home

Shift Group: A1 Home Care No Shift

PoS Direction: To From N/A

Code(s):

Status

Status: 01- Pending

Cancel: 01- Pending

02- Confirmed

03- In-Process

04- Closed

09- Hold

10- Cancelled

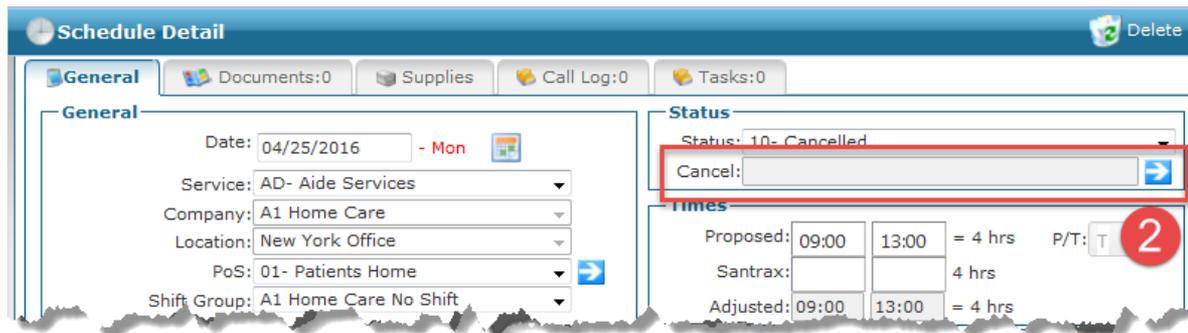
Times

Proposed: 09:00 13:00 = 4 hrs

Adjusted: 09:00 13:00 = 4 hrs

Associated Totals

2. Click the Blue arrow next to the Cancel field, select the appropriate reason code and click Save.



Schedule Detail [Delete]

General Documents:0 Supplies Call Log:0 Tasks:0

General

Date: 04/25/2016 - Mon

Service: AD- Aide Services

Company: A1 Home Care

Location: New York Office

PoS: 01- Patients Home

Shift Group: A1 Home Care No Shift

PoS Direction: To From N/A

Code(s):

Status

Status: 10- Cancelled

Cancel: [Dropdown Menu]

Times

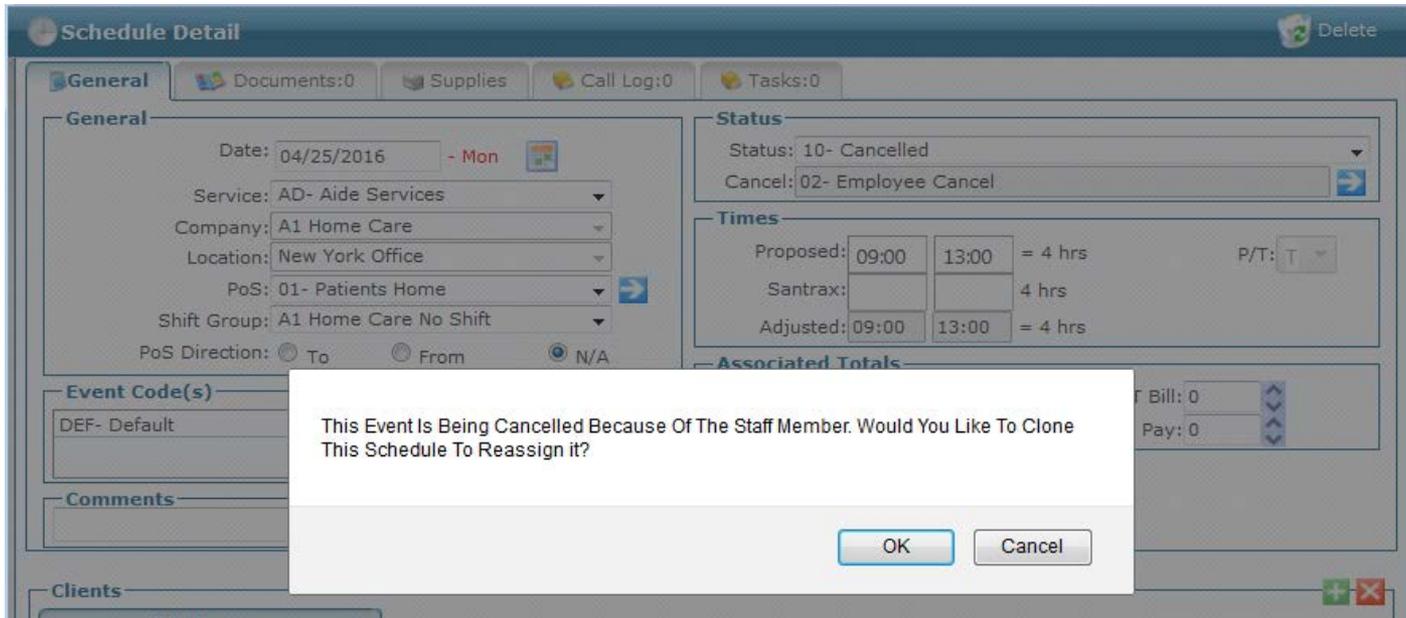
Proposed: 09:00 13:00 = 4 hrs P/T: T

Santrax: 4 hrs

Adjusted: 09:00 13:00 = 4 hrs

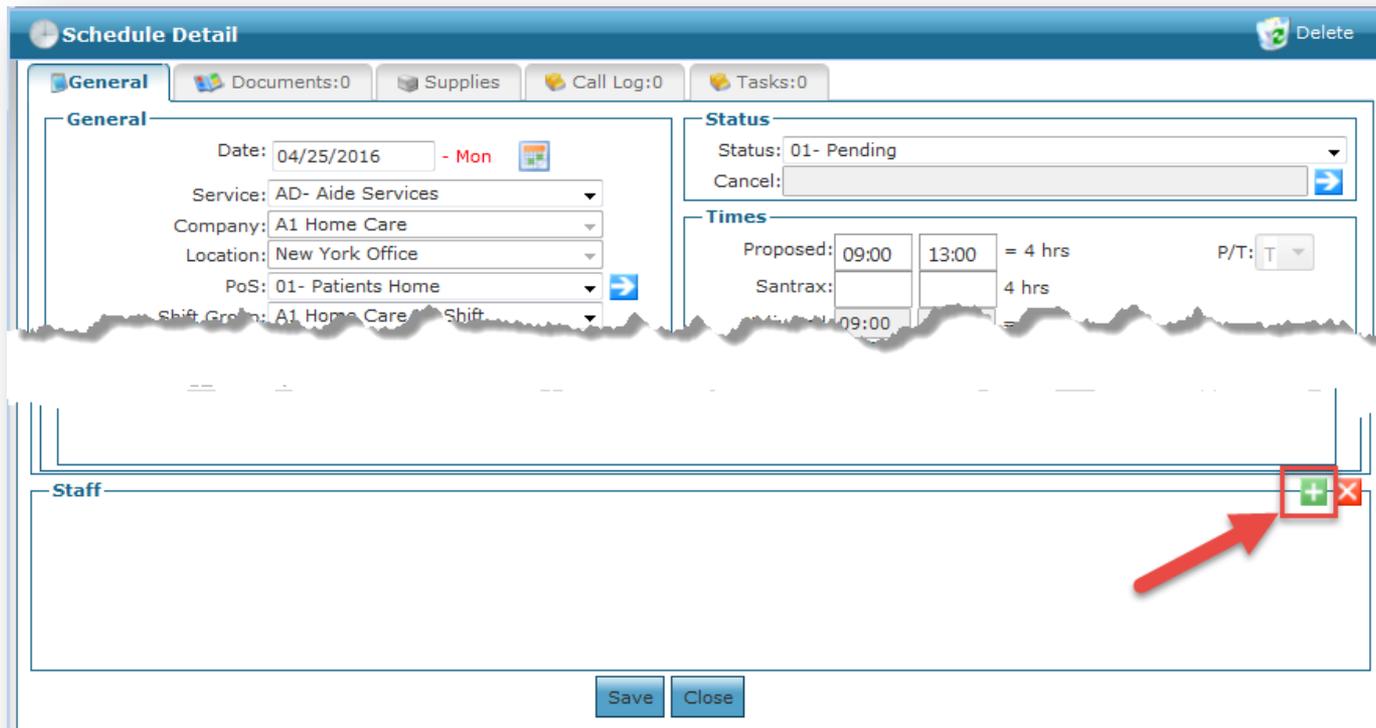
Individual Schedule Edit – Changing Caregiver

3. Click **OK** when prompted to Clone the schedule to Reassign it



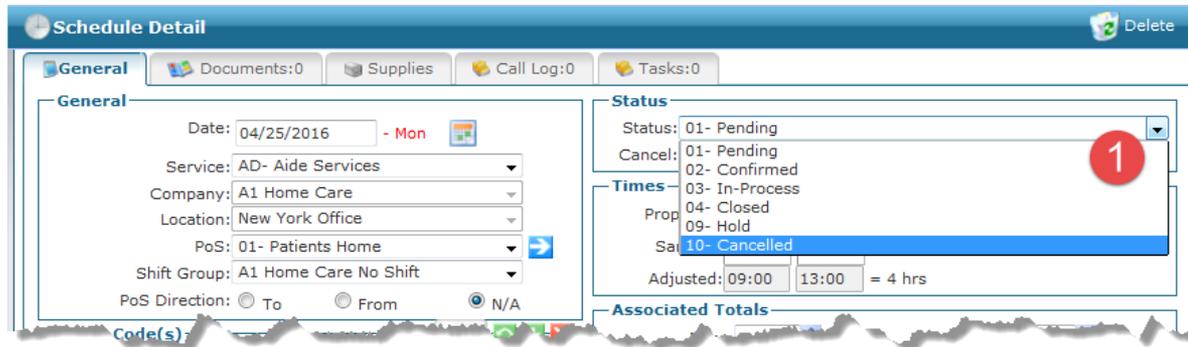
Individual Schedule Edit – Changing Caregiver

4. Click OK to view the new schedule to add the replacement caregiver and click Save. – *OR* –
Click Save without selecting a replacement caregiver if not yet known.

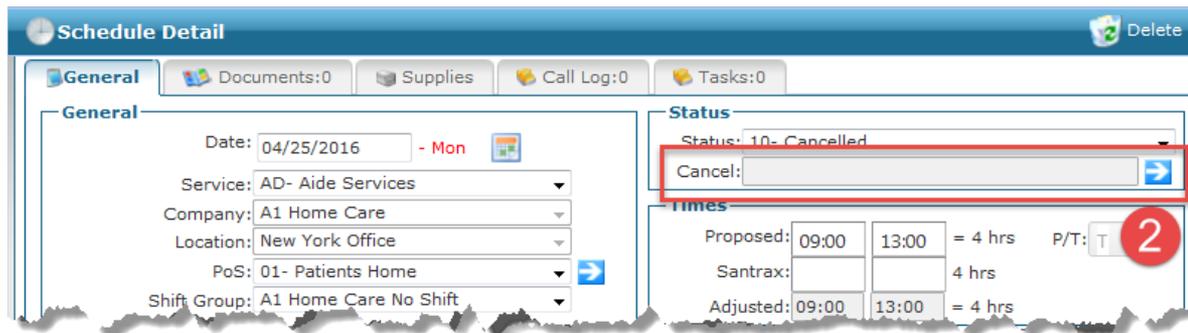


Individual Schedule Edit – Canceling a Visit

- To cancel a schedule due to a client reason:
 1. Change the schedule Status to Cancelled.



2. Click the Blue arrow next to the Cancel field, select the appropriate reason code and click Save.



Allows for quick editing of schedules individually or as a group.

- Use the filters to focus on the schedules that need to be updated.
- Right-click on schedules and choose **Select All** or click the schedules to be edited. (Ctrl + click to select multiple).
- Right-click again and choose Mass Edit
- Mass Edit options displayed are: **Times, Staff, Event Codes, Bill Type** or **Pay Type**.
- Select the appropriate choice and follow the wizard.

Mass Edit



Chart ID	Staff	Pos	Service
D7477141727-HH	Wells, Jamie	HHA	T1021
D747	ie	HHA	T1021
D747	ie	HHA	T1021
D747			

- Open
- Select all
- Unselect all
- View ▶
- Mass edit ▶
- Copy forward
- Refresh rates

- Client
- Event code
- Service
- Staff
- Status
- Times
- Bill by
- Pay by

Schedules and Recipient Status



Changing a client's status to **Hold** or **Discharged** will cancel previously scheduled encounters.

- Schedules will be cancelled from the effective date forward.
- Staff will be removed and available for re-assignment

Schedules and Recipient Status



Changing a client's status from **Hold** to **Active** will reactivate previous cancelled schedules.

- Schedules can be rebuilt based on any new or revised authorizations.
- If existing schedules are changed from **Cancelled** to **Pending** status (with Mass Edit), staff will be blank.

What You Have Learned



- 🌀 How to create new schedules
 - New Events
- 🌀 Accessing New Events and entering schedules
- 🌀 Accessing the Scheduling Overview screen
 - Search Filters, Sorting, and Status colors
 - Opening and viewing the Schedule Detail
- 🌀 Editing individual schedules
- 🌀 Using Mass Edit for quick editing of a group of schedules



DEMONSTRATION – EDIT SCHEDULES

- Mass Edit Tool

