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Get more right from the start

Connecticut Department of Mental Health and Addiction Services

Electronic Visit Verification (EVV) Provider Training Scheduling Module

Agenda

- Searching for Schedules
- Creating Schedules
- Editing Schedules

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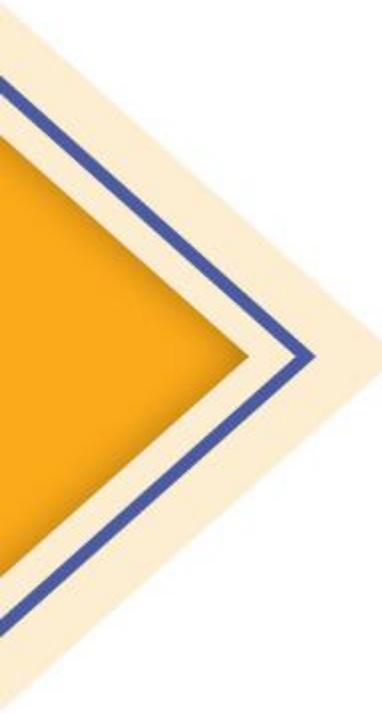
SCHEDULING OVERVIEW SCREEN
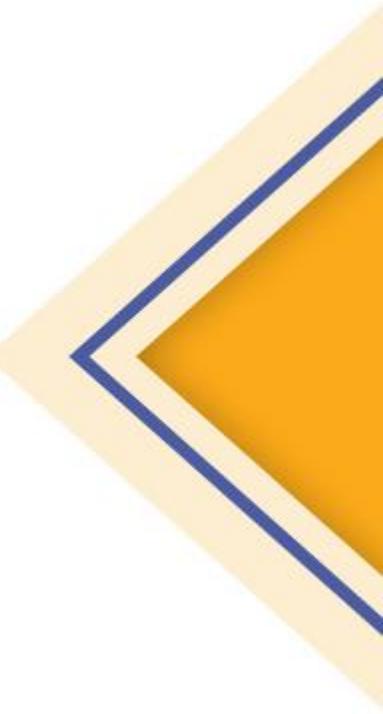
Scheduling Overview

▶ Click **Scheduling** on the menu bar to open the **Scheduling Overview** screen.
▶ The **Scheduling Overview** screen is used to view or edit an existing schedule.
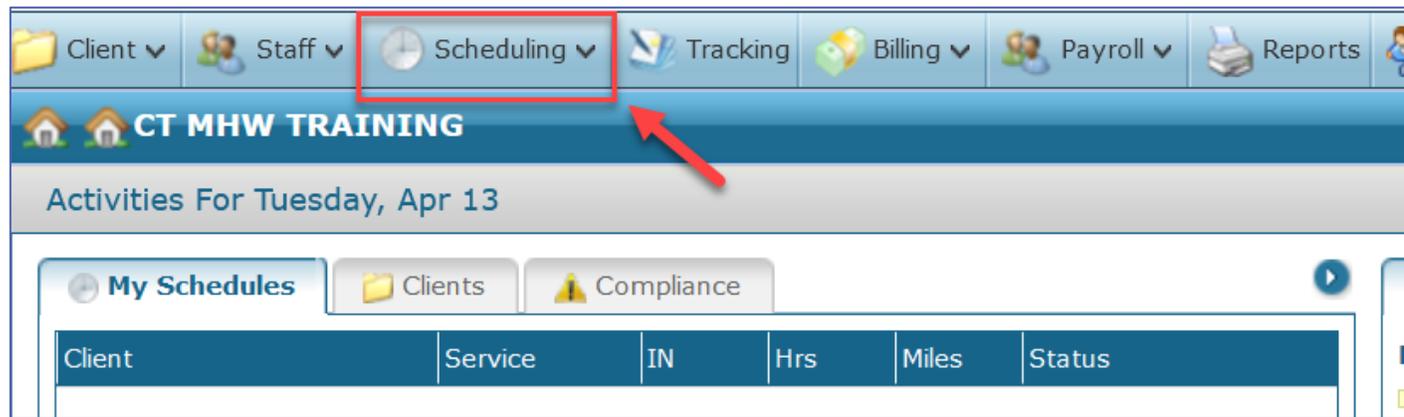
Search Filters

- Client or Staff
- Branch Location
- Coordinator, Managers
- Status

- Service or Position
- Date Range
- Days of the Week
- Unassigned (no staff selected)

Sorting Results

▶ Clicking any column header sorts the results by that column

▶ Clicking a second time reverses the sort order

Date	Coordinator	Client ▲	Chart ID	Staff	P/T	Pos	Service	EC	P/T	INP	OUTP	P/T	TZ	HrsP
02/05/18-Mon		Adams, Arthur	NY-0201726-MCD				HHA	DEF	P	09:00	16:00	P	E	7
02/05/18-Mon		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF	P	12:00	17:00	P	E	5
02/06/18-Tue		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF	P	12:00	17:00	P	E	5
02/05/18-Mon		Aranda, Tommy	HOU-0201682-SC	Banner, Bruce	P	HHA	17HC	DEF	P	14:30	14:45	P	C	0.25
02/06/18-Tue		Aranda, Tommy	HOU-0201682-SC	Banner, Bruce	P	HHA	17HC	DEF	P	14:30	14:45	P	C	0.25
02/05/18-Mon	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, Bruce	P	HHA	HSK	DEF	P	12:00	14:00	P	E	2
02/06/18-Tue	525-Brown	Ash, Ally	NY-0201723-MCD	Banner, Bruce	P	HHA	HSK	DEF	P	12:00	14:00	P	E	2
02/06/18-Tue		Aston, Amy	NY-0201725-MCD	John, Jimmy	P	HHA	HSK	DEF	P	11:00	16:00	P	E	5
02/05/18-Mon		Brill, Joyce	HOU-0201610-TC	Bartlett, Jedd	P	HHA	17HC	DEF	P	19:00	22:00	P	C	3
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Cook, Adele	P	HHA	17HC	DEF	P	07:00	09:00	P	C	2
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Bartlett, Jedd	P	HHA	17HC	DEF	P	19:00	22:00	P	C	3

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Schedule Status Colors

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

◀◀ ◀ **1** 2 ▶ ▶▶	Page size: 100 ▾													160 items in 2 pag		
Date	**Coordinator**	**Client**	**Chart ID**	**Staff**	**P/1**	**Pos**	**Service**	**EC**	**P/1**	**INP**	**OUTP**	**P/I**	**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, M:	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

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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	Coordinator	Client ▲	Chart ID	Staff	P/T	Pos	Service	EC
02/05/18-Mon		Adams, Arthur	NY-0201726-MCD				HHA	DEF
02/05/18-Mon		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF
02/06/18-Tue		Ale, Adam	NY-0201724-MCD	Daniels, Jack	P	HHA	HSK	DEF
02/05/18-Mon		Aranda, Tommy	HOU-0201682-SC	Banner,				
02/06/18-Tue		Aranda, Tommy	HOU-0201682-SC	Banner,				
02/05/18-Mon	525-Brown	Ash, Ally	NY-0201723-MCD	Banner,				
02/06/18-Tue	525-Brown	Ash, Ally	NY-0201723-MCD	Banner,				
02/06/18-Tue		Aston, Amy	NY-0201725-MCD	John, Jim				
02/05/18-Mon		Brill, Joyce	HOU-0201610-TC	Bartlett,				
02/06/18-Tue		Brill, Joyce	HOU-0201610-TC	Cook, Adele	P	HHA	17HC	DEF

Open
Select all
Unselect all
View ▶
Edit ▶
Copy forward
Refresh rates

Viewing Schedule Detail

Demonstration – Scheduling overview

Search Filters

Sorting Search Results

Schedule Details

Creating New Schedules

- Permanent Templates
- New Events

Permanent Schedule Templates

▶ Supports a variety of schedule patterns

- Every day, Every weekday, Every Other week, different workers on different days......

▶ From the Client record, click the Permanent link

▶ Click the Green Plus in the upper-right to add a schedule pattern week

▶ Right-click under any day to add a schedule template
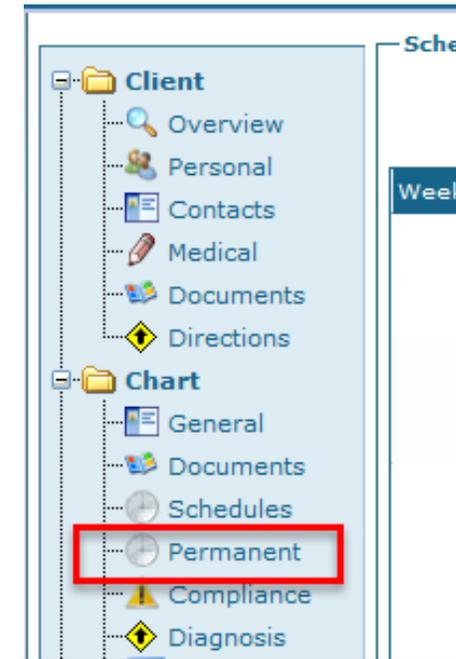
Schedules - Generated Through: 02/18/2018

Generate 02/25/2018 (mm/dd
Through: /yyyy)

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	HHA: 09:00 - 16:00 Brooks, Dawn		HHA: 09:00 - 16:00 Brooks, Dawn	HHA: 09:00 - 16:00 Brooks, Dawn	HHA: 09:00 - 16:00 Brooks, Dawn	HHA: 09:00 - 16:00 Brooks, Dawn	

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Permanent Schedule Templates

▶ Fill in the pattern details and 'apply changes' to save

▶ Right-click on the saved template to copy to additional days

Permanent Schedule Manual Generation

On a client by client basis, you will be able to generate schedules past the normal pattern to capture changes:

E.g. Regular staff member tells you that she will be away for the next month, you know the replacement aide, but you only have schedules for the next 2 weeks, Generate the schedules for just that client capture the change and the system will save it

1. This **Generate Through** date indicates schedules exist up to that date.

2. To generate additional schedules (for just this client), modify the '*Generate Through*' field and click th

1

2

Schedules – Generated Through: 06/30/2016

Generate Through: 06/30/2016 (mm/dd/yyyy)

Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		AD: 09:00 - 11:00 Beane, Billy............			AD: 09:00 - 11:00 Beane, Billy............		
2							

Blank week indicates every other week pattern.

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Demonstration – Permanent templates

Creating Permanent Schedule Template

Edit a Permanent Schedule Template

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.**
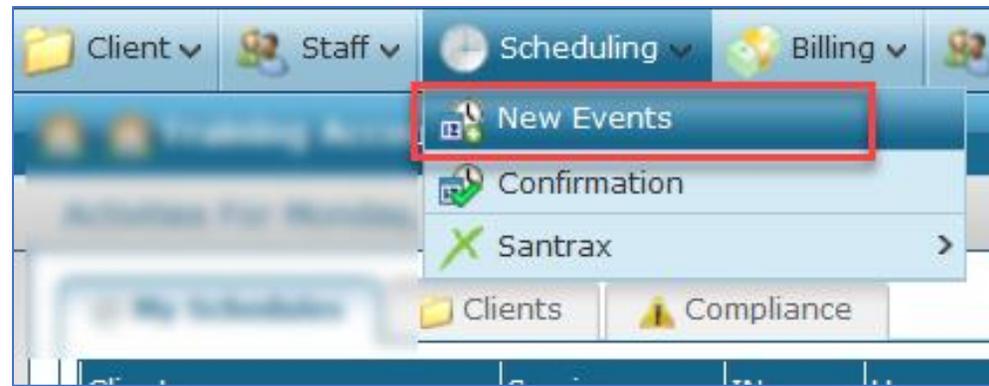
New Events Screen

Information on the screen is best populated from left to right and top to bottom.

- Frequency (single event, days of the week)
- Dates
- Client

- Staff (filtered based on Service and Client
- Service (including Bill and Pay Type
- Times (military time)

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

Date(s)

Begin: 03/17/2021

End: 03/29/2021

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New Events Process

3. Select a **Client** (Service, Bill type and Pay type will populate).

    ▸ Type the name into the Client field.
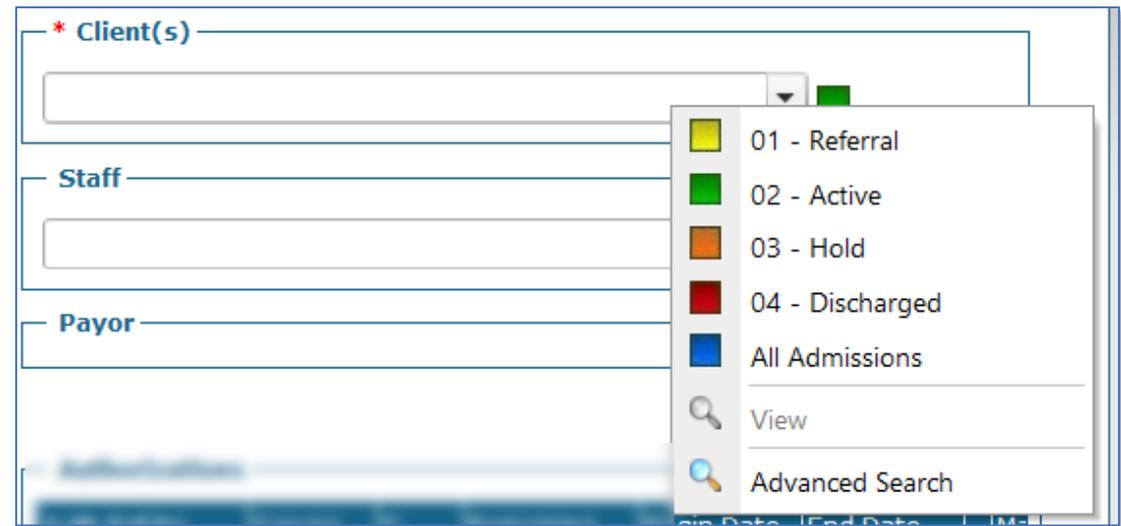
    ▸ Click the status square next to the field to use the **Advanced Search** option.

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.
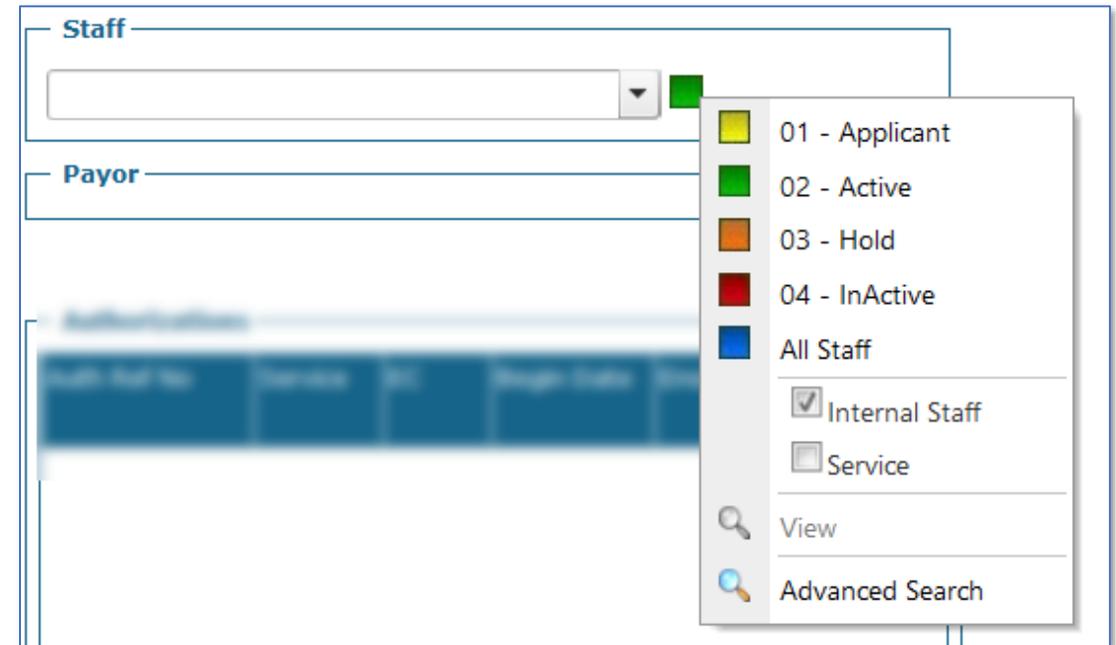
New Events Process

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.
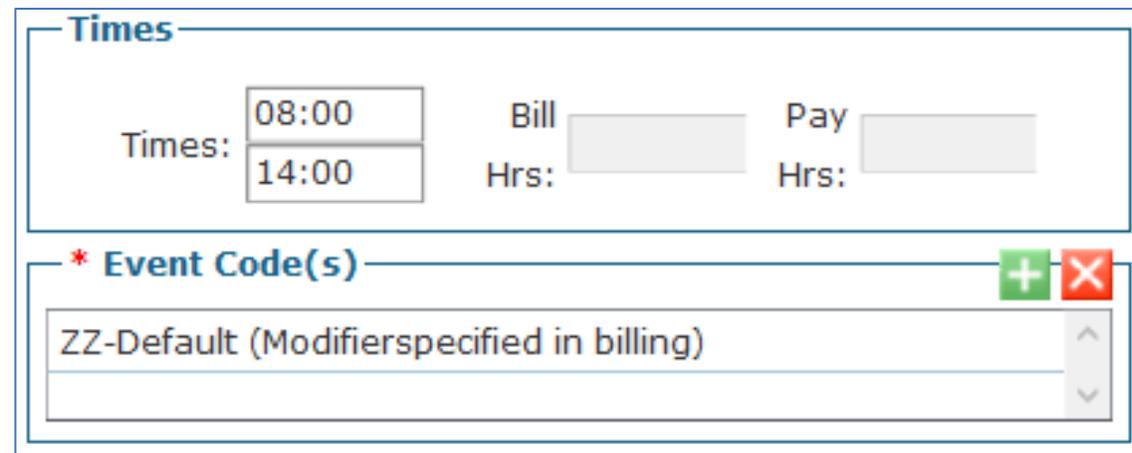
New Events Process

8. 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	TZ	Duration	Status
	2/5/2018-Mon	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending
	2/7/2018-Wed	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending
	2/8/2018-Thu	Adams, Arthur	Bartlett, Jedd	HHA	DEF-Default	10:00	15:00		5	01- Pending

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

Demonstration – New Events

Creating Schedules

Checking for Conflicts

Committing Schedules

Editing Schedules
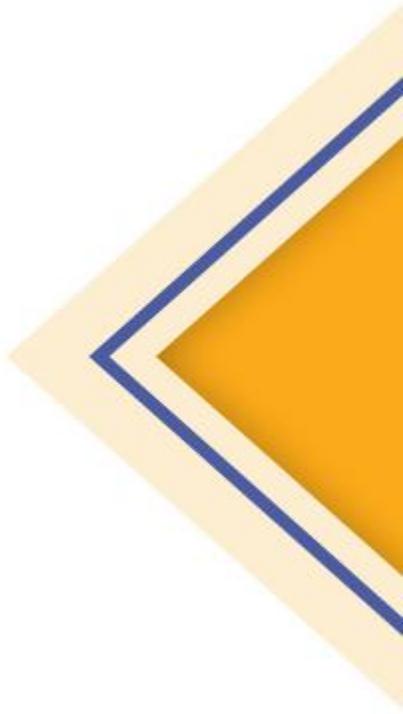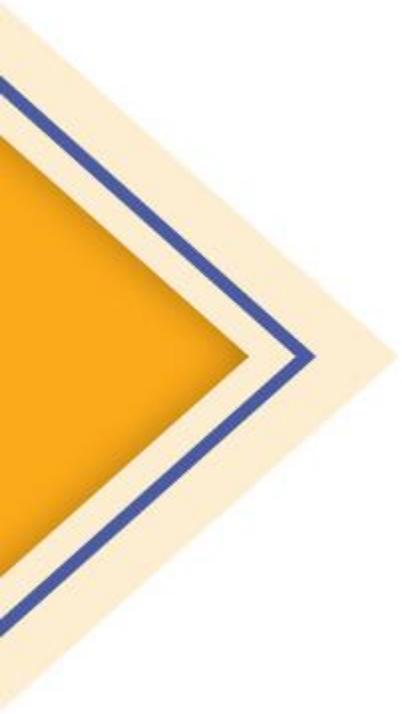
Individual Schedule Edit – Times

▸ 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 status to **Cancelled**.
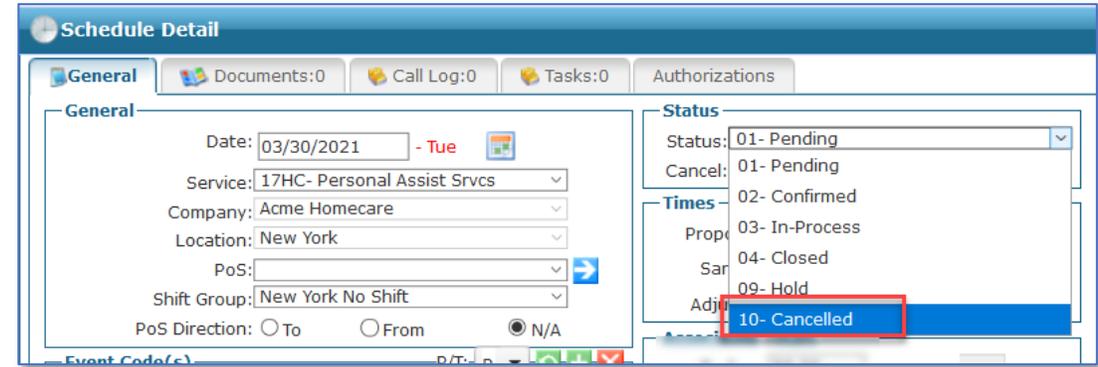
2. Click the arrow next to the *Cancel* field, choose the appropriate reason code and click Save.
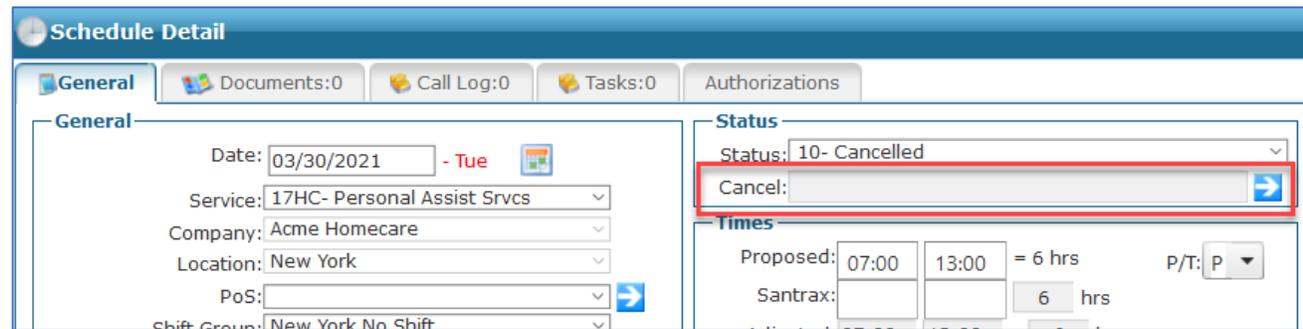
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Individual Schedule Edit – Changing Caregiver

3. Click **OK** when prompted to Clone the schedule to Reassign it
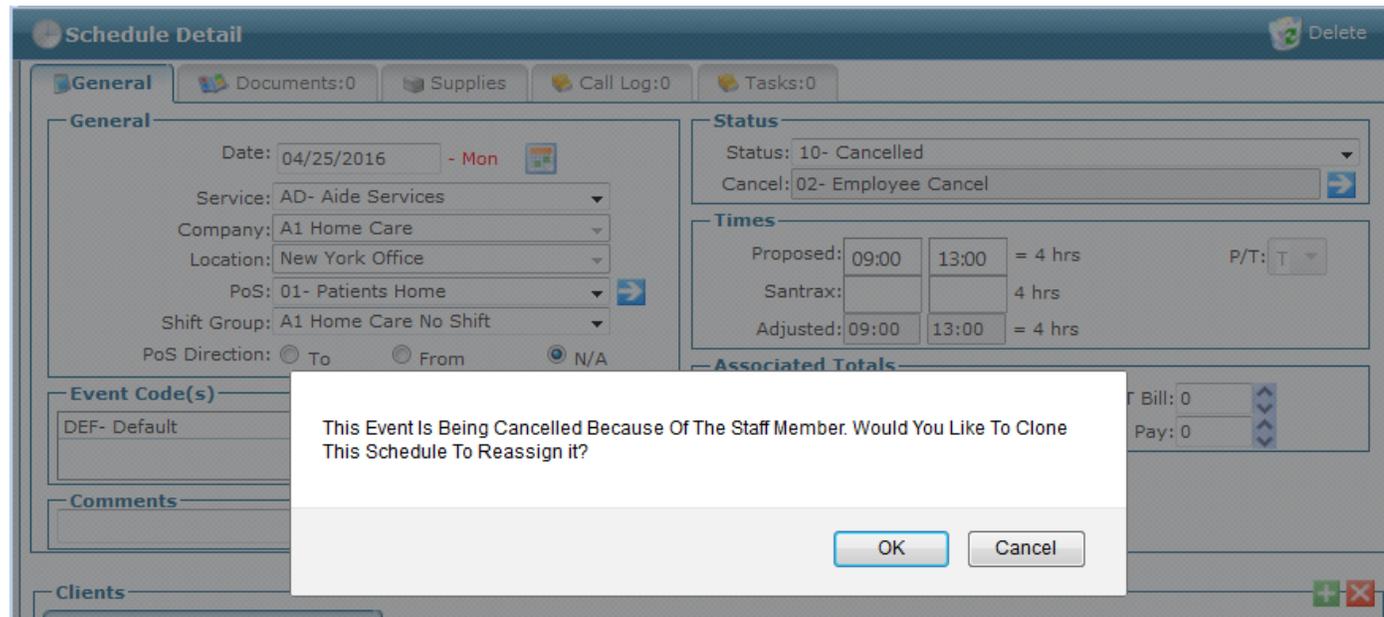
Individual Schedule Edit – Changing Caregiver

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 – Quick Cancel

To cancel a schedule due to a client reason:

1. Change the schedule status to **Cancelled**.
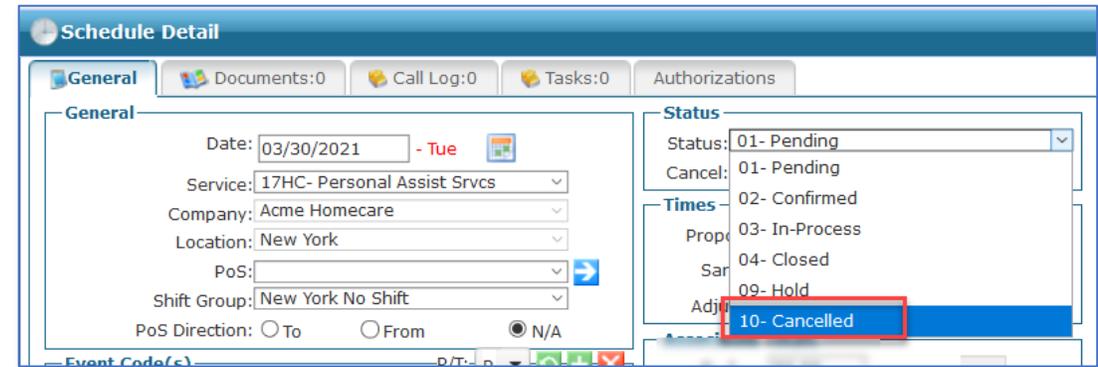
2. Click the arrow next to the *Cancel* field, select the appropriate reason code and click Save.
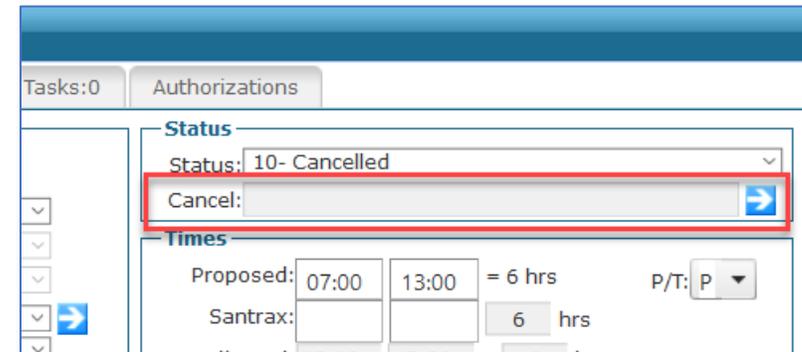
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Mass Edit –
Times, Staff, Event Codes, Status

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.

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Mass Edit

Mass Edit – Service

▶ The Service for schedules can also be edited as a group instead of individually

▶ From the Scheduling Overview screen, use the filters to identify the schedules to be edited.

▶ The current Service must be selected as one of the filter options

▶ Once the schedules are displayed, right-click to 'Select All.

▶ Right-click again and choose *Mass Edit > Service.*

▶ Select the new service, click Save and choose the appropriate reason for the change.

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Schedules and Client 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

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Schedules and Client 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.

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DEMONSTRATION – EDIT SCHEDULES

Mass Edit Tool

What You Have Learned

▶ Accessing the Scheduling Overview screen
- Search Filters, Sorting, and Status colors
- Opening and viewing the Schedule Detail

▶ How to create new schedules
- Permanent Template
- New Events

▶ Editing individual schedules

▶ Using Mass Edit for quick editing of a group of schedules

KNOWLEDGE IS KEY
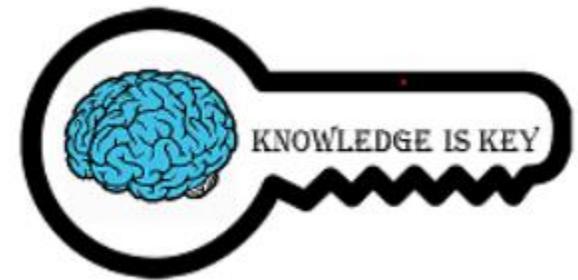
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Questions...
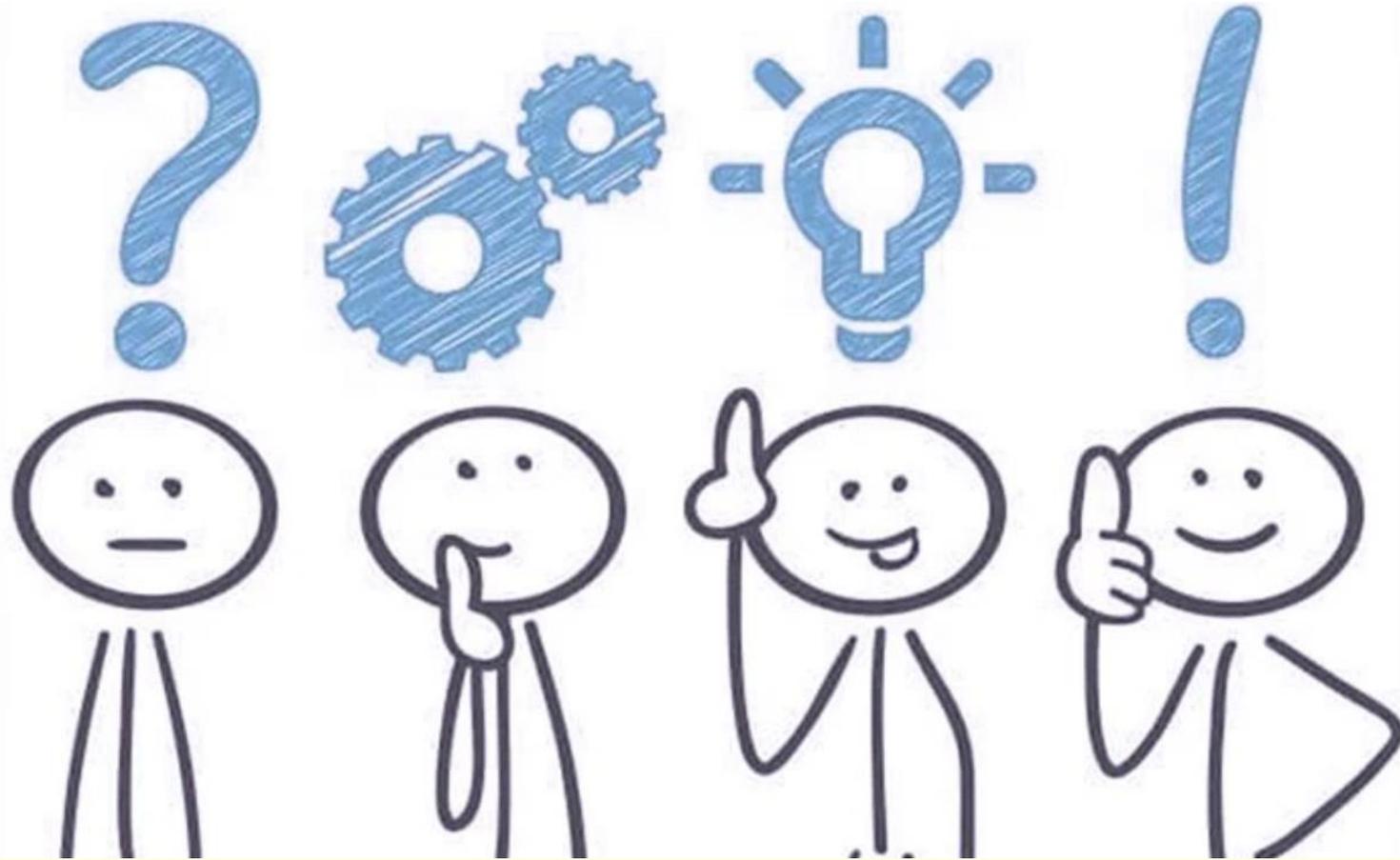
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