Scheduling in HomeTrak Companion

TABLE OF CONTENTS
HomeTrak Terms of Reference
Calendar Icons in HomeTrak
Adding Tasks & Appointments
Setting Up a Client Authorization (Mandatory)
How to Create a Schedule
Editing a Schedule
Cancelling a Schedule
Copying & Pasting Schedules
How to Create a Recurring Schedule
How to Edit a Recurring Schedule

HomeTrak Terms of Reference

TASKS are To-Do's or a list of things that need to be completed. Tasks do not block time. They are simply a reminder.

APPOINTMENTS are events that block time on your calendar. Overlapping appointments provide an alert icon on your calendar.

SCHEDULES are events between a Caregiver/Office Staff and a Client which blocks time on both calendars. Schedules can be processed through Billing or Payroll or both.

AUTHORIZATIONS are the permission to provide care for a Client. You **MUST** have an Authorization in order to create schedules.

DOCUMENTED EVENTS are any type of event you need to record and report on and can play two roles:

- ***Document significant events (good or bad) involving clients and/or caregivers***
- ***Document the minutes of a meeting or conversation***

A Documented Event appears in the profiles of **ALL** parties involved. You can run robust reports on these events.

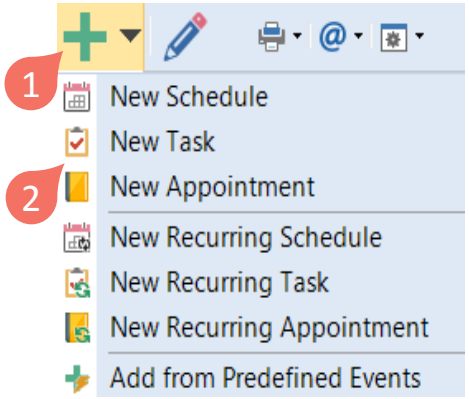
Calendar Icons in Companion

	Indicates the schedule either has a status of Office Alert, has No Caregiver Selected, or is in conflict with another schedule.
	A Note has been added to the schedule.
	An Extra Charge item has been added to the schedule.
	An Attribute has been added to the schedule.
	This schedule is isolated from the Master Recurrence from which it was created. (Editing a selected event for a schedule created from a recurrence will automatically mark it as isolated.)
	A Documented Event has been added to the schedule.
	Indicates the Schedule has Warnings or Errors associated with it.
	Schedule has Actual Hours entered.
	Schedule is Finalized.
	Payroll for the schedule has been posted.
	Billing for the schedule has been posted.
	Billing and Payroll for the schedule have been posted.
	No Caregiver has been added to the schedule.
	Calendar Item is an Appointment (not a schedule).
	Calendar Item is a Task (not a schedule).
	Status of the schedule is Cancelled.
	Status of the schedule is Open.
	Status of the schedule is Completed, Payroll and Billing have been posted.
	Actual hours has not been entered on the schedule
	Schedule has a start of call from telephony or GPS
	Schedule only has an end of call from telephony or GPS
	Schedule has a completed etimecard from telephony or GPS
	Back-to-back sequence of schedules has a start of call from telephony or GPS

Adding Tasks & Appointments

Click on your name in the left Result field to bring up your calendar (your name shows above calendar)

Left Click Option

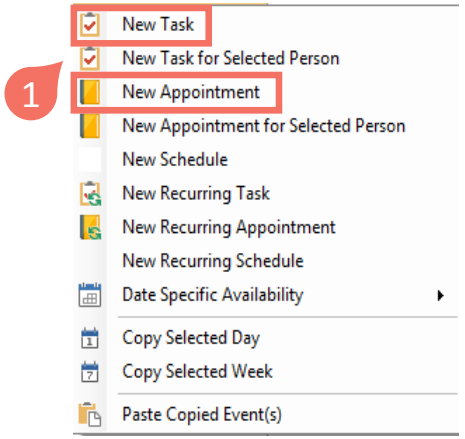


Left click on the day you wish create a Task or Appointment so it's highlighted

1. Click on **Add**
2. Click on **New Task** or **New Appointment**

OR

Right Click Option

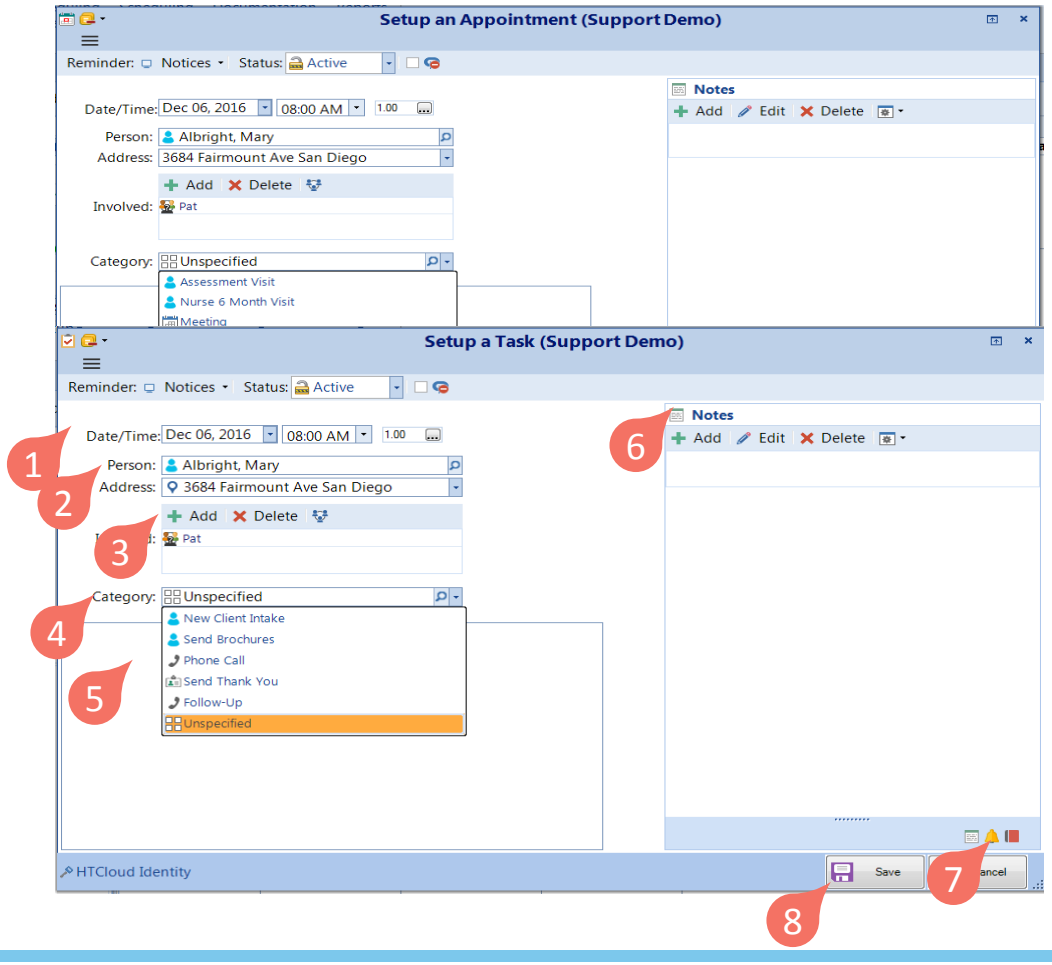


Right click on the day you wish create a Task or Appointment so it's highlighted

1. Click on **New Task** or **New Appointment**

Adding Tasks & Appointments (Continued)

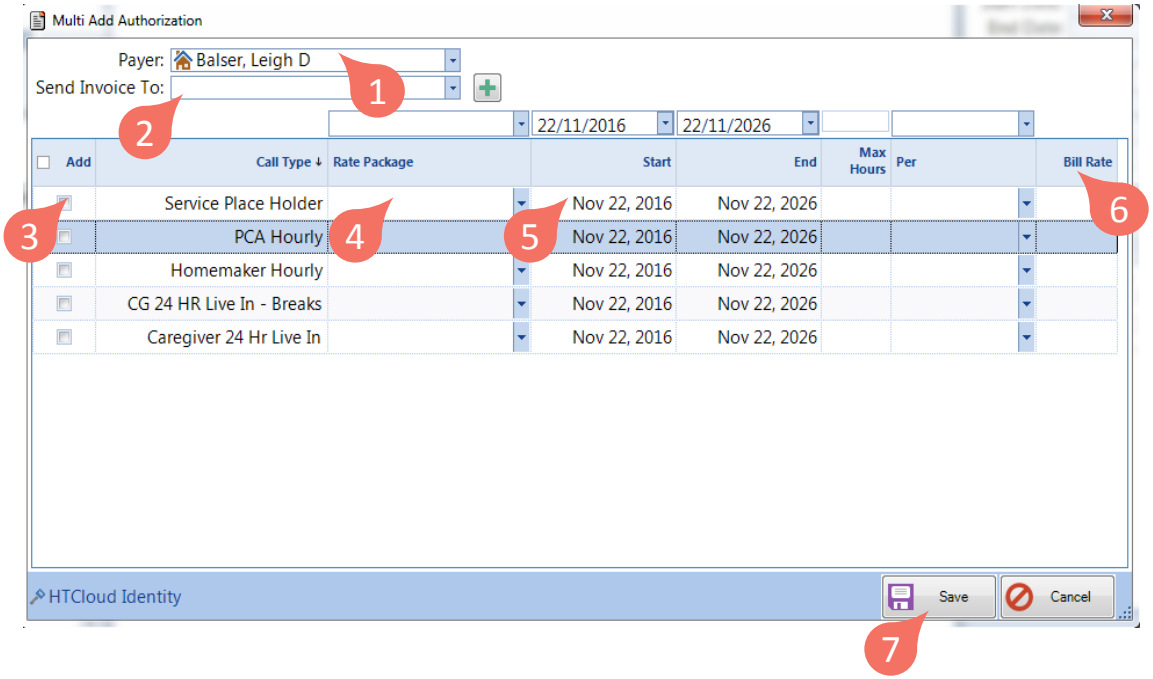
1. Enter in the **Date/Time** and **Length** (Hours)
2. Type in the Person that Task or Appointment is for (click magnifying glass to search)
3. Add who is **Involved** (Office Staff, Caregiver, Emergency Contact, Contact)
4. Enter in the Task or Appointment **Category**
5. Type a quick, detailed note regarding the task (Max 200 characters)
6. If needing to type in or copy/paste a document, add a **Note** (Max 10,000 characters)
7. Send a Notice to notify/remind someone about this Task (Optional)
8. **Save**



Setting Up a Client Authorization (Mandatory)

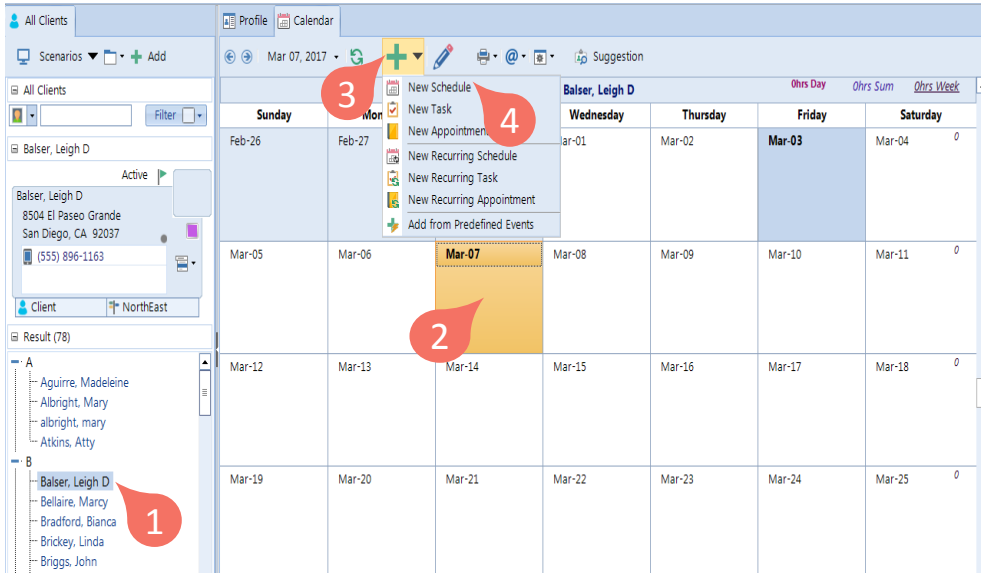
After clicking on Authorizations, click on **Multi-Add** to display all services to select from.

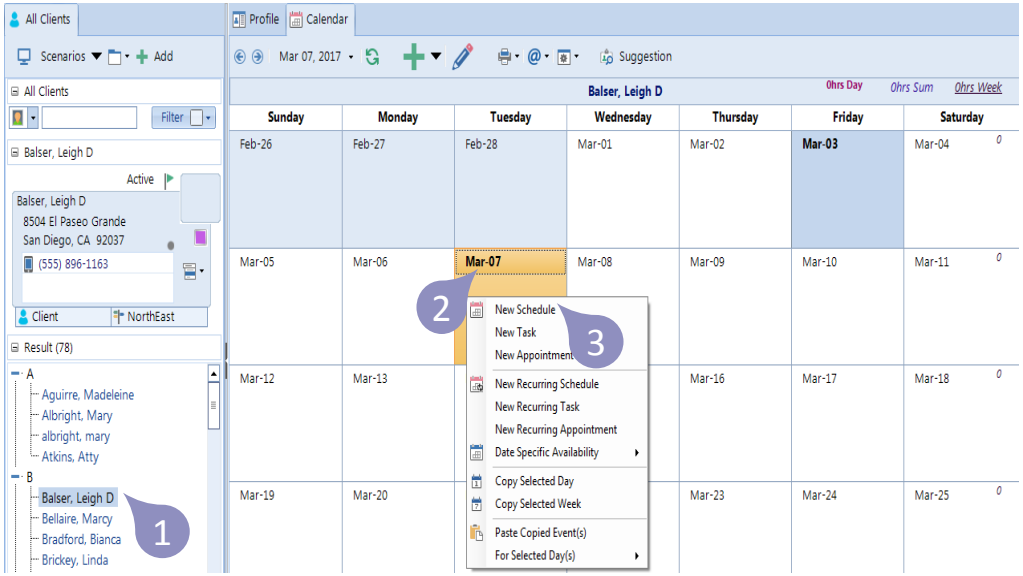
1. Choose the **Primary Payer** that will be paying the bill (Client or a company found in the **Payers** tab)
2. The **Send Invoice To** option allows you to specify where an invoice should be mailed to; it can be sent to an Emergency Contact or Individual
3. Check off what service(s) [**Call Type(s)**] are being provided
4. Select the **Rate Package** (i.e. Hourly, Per Visit, 24 Hour Live-In
5. Select the Authorization **Start** date(s) [First day of services]
6. Enter in the appropriate **Bill Rate** for the service(s)
7. Click **Save**



How to Create a Schedule

Two different methods for creating a schedule: Left Click or Right Click





Left Click Method

1. Click on the Client or Caregiver in the Result field
2. Left Click on the day you want to create a schedule so it's highlighted
3. Left Click on the **Add** button in the tool bar to generate a list of options
4. Click on **New Schedule**

Right Click Method

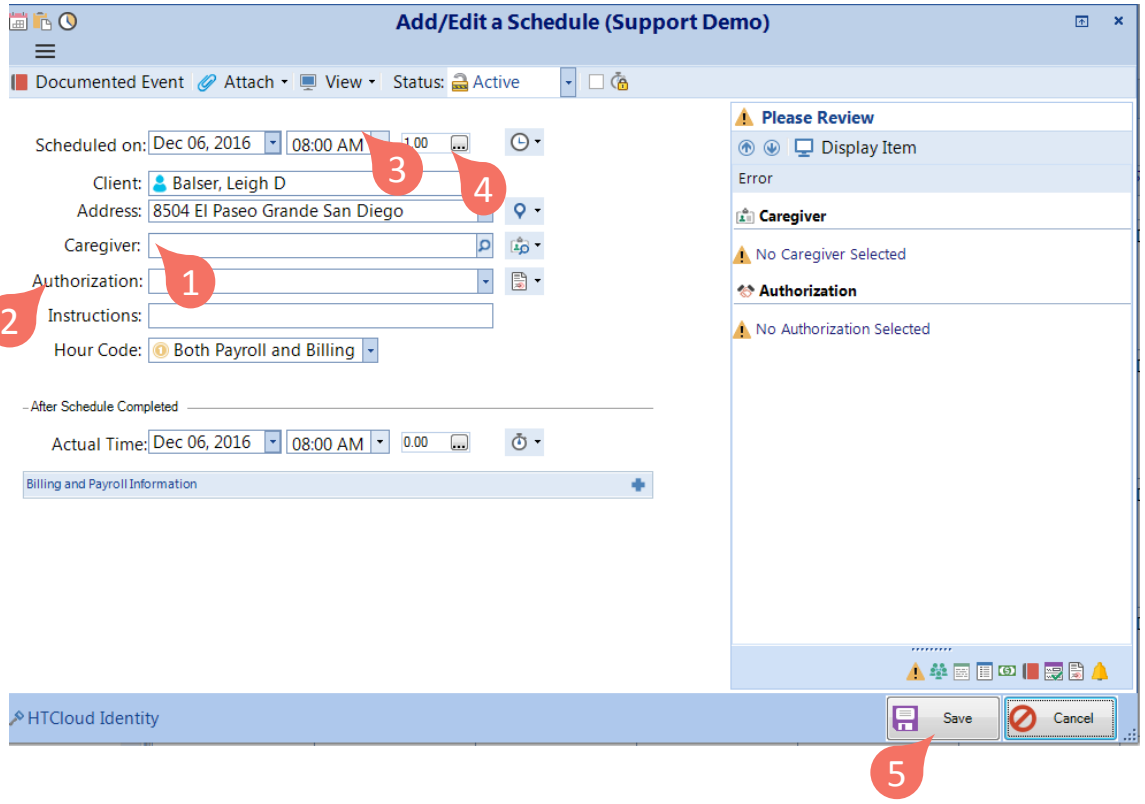
1. Click on the Client or Caregiver in the Result field
2. Right Click on the day you want to create a schedule to generate a list of options
3. Left Click on **New Schedule**

How to Create a Schedule (Continued)

If on the Client Calendar, the Client details will be pre-filled.

If on the Caregiver Calendar, the Caregiver details will be pre-filled.

1. Type in the **Client** or **Caregiver** name (whichever is missing)
2. Select the **Authorization**
3. Set the **Start Time**
4. Indicate the **Hours** (Length of Schedule)
5. Click **Save**



Editing a Schedule

Left Click Method

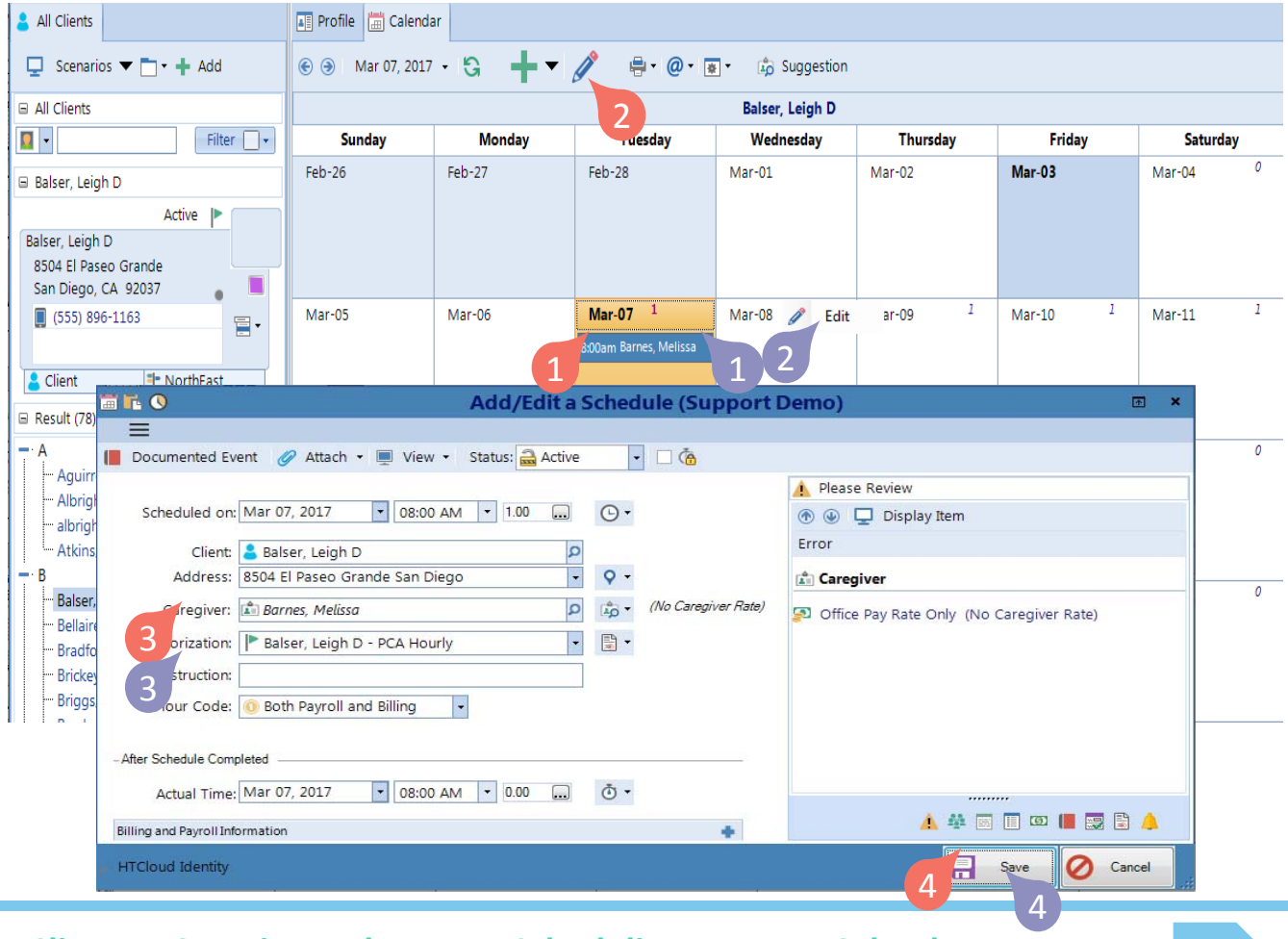
1. Double Left Click on the schedule

OR

2. Left Click once on schedule and click on **Edit**
3. Make changes to the schedule
4. Click **Save**

Right Click Method

1. Right Click on the schedule
2. Left Click on **Edit**
3. Make changes to the schedule
4. Click **Save**

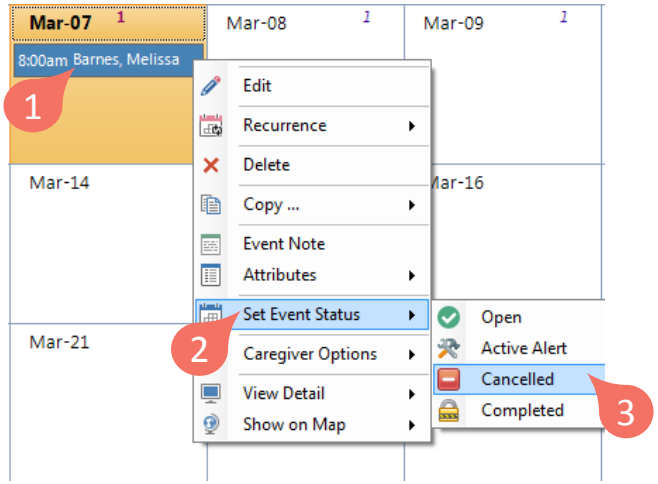


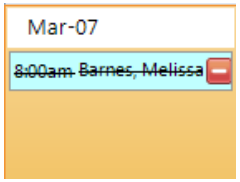
Cancelling a Schedule

If there is a schedule that was created but is no longer needed, you'll want to Cancel it so you have the historical information available to you.

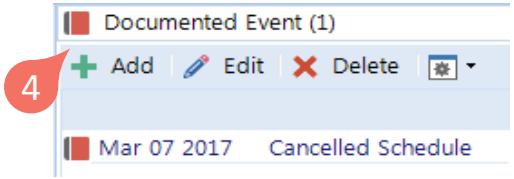
1. Right click on the schedule you wish to cancel to generate a list of options
2. Left click on **Set Event Status**
3. Left Click on **Cancel**
4. As a best practice, it is recommended to create a **Documented Event** to indicate:
   - Who was involved
   - What happened
   - When it happened
   - Where it happened
   - Why it happened

This can be completed on the **Detail Panel** to the right of the calendar



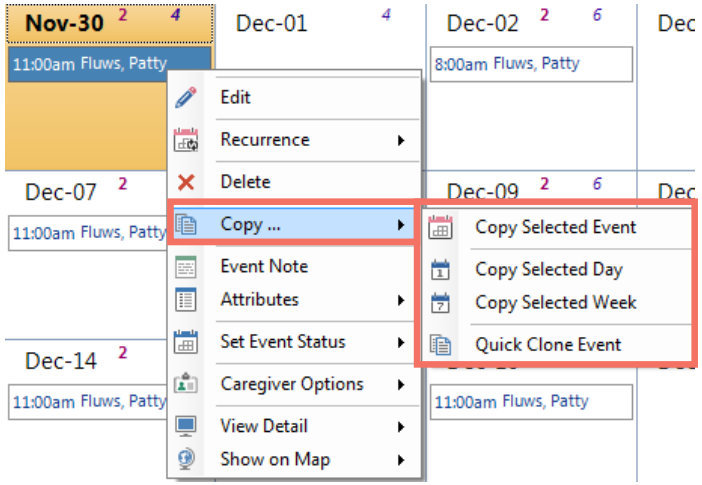


Example of what a Cancelled Schedule looks like



Copying and Pasting Schedules

Copying a Schedule

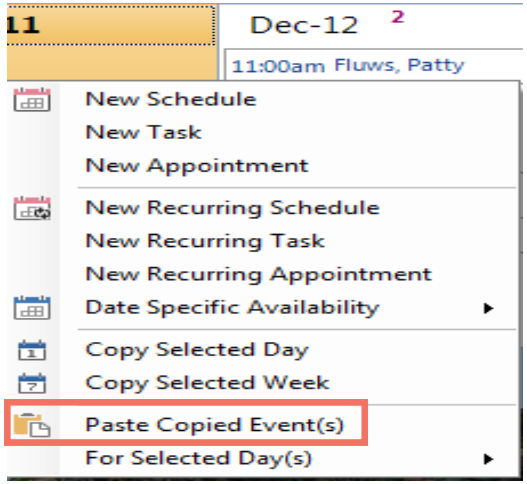


1. Right Click on the Schedule you would like to copy
2. Left Click on **Copy**
3. Left Click on:
   - ***Copy Selected Event***
   - ***Copy Selected Day*** (copies all schedules on that day)
   - ***Copy Selected Week*** (copies all schedules for that week)

QUICK TIP

- Click on a Schedule
- ***Ctrl + C*** to Copy
- Select day on calendar
- ***Ctrl + V*** to Paste

Pasting a Schedule



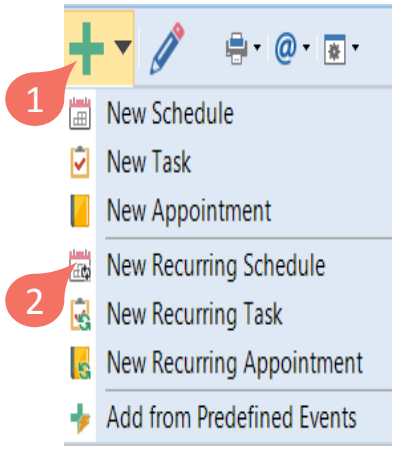
After copying the desired schedule(s):

1. Right Click on the day (or one day during that week if copying a whole weeks worth of schedules)
2. Select ***Paste Copied Event(s)***

How to Create a Recurring Schedule

A Recurrence can be set up if a Client requires service(s) that repeats on a regular basis.

Left Click Method

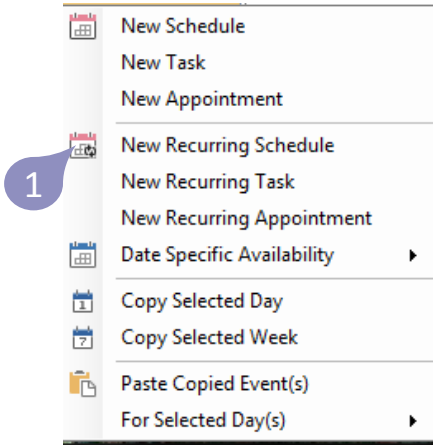


In the Result field, highlight the person you want to create a schedule for.

Left Click on the first date in which you would like the recurrence to begin

1. Left Click on the Add on the toolbar above the calendar
2. Left Click on ***New Recurring Schedule***

Right Click Method



In the Result field, highlight the person you want to create a schedule for.

Right Click on the first date in which you would like the recurrence to begin.

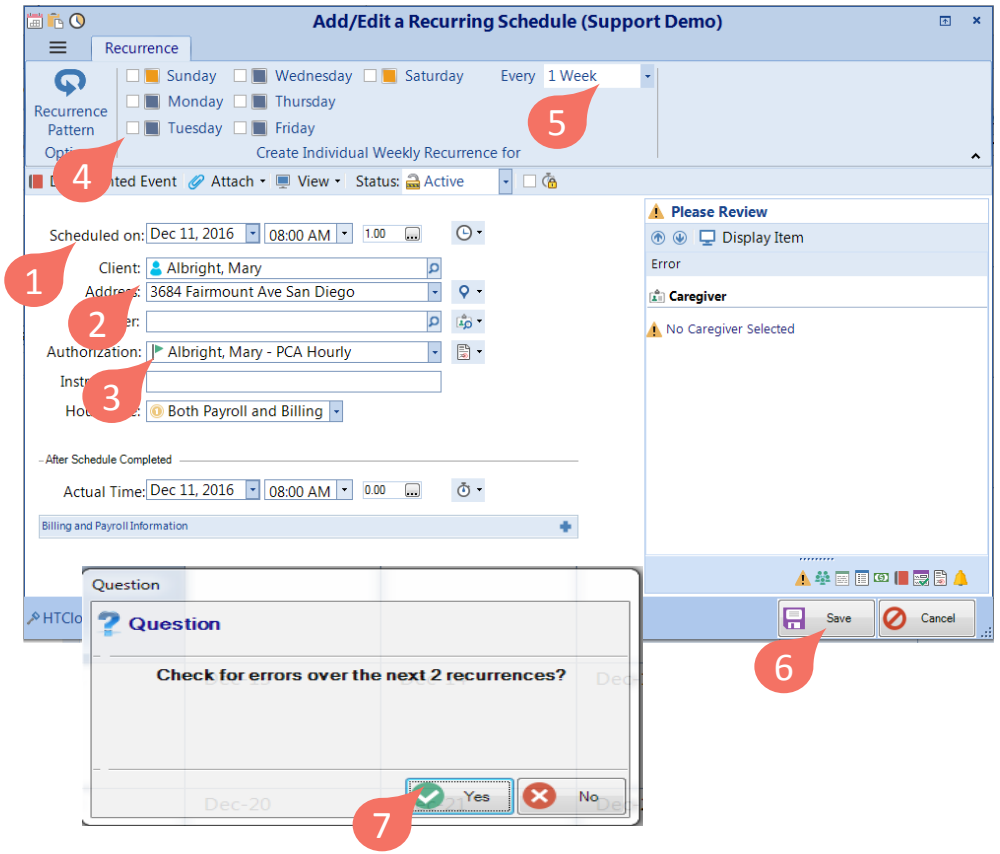
1. Left Click on ***New Recurring Schedule***

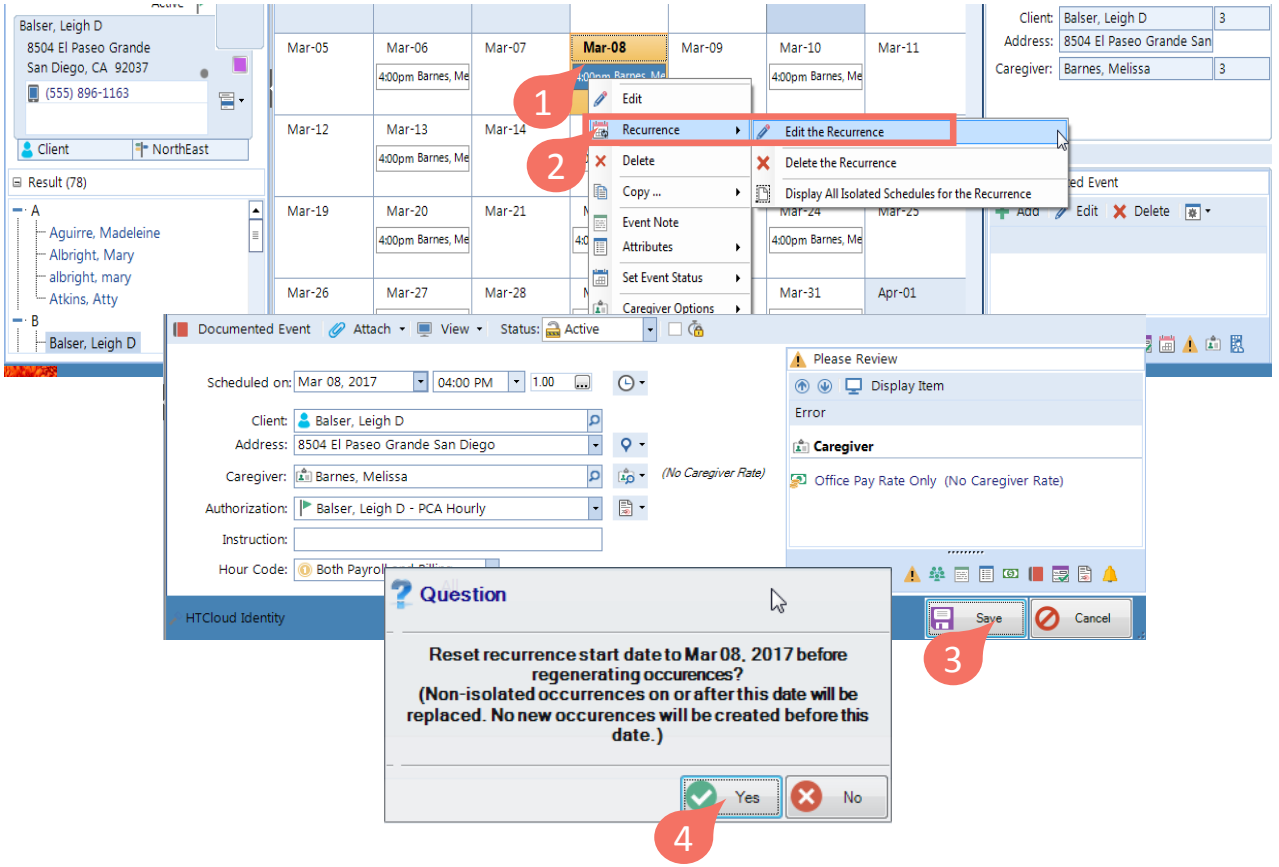
How to Create a Recurring Schedule (Continued)

What I Need In Order To Create a Recurring Schedule

1. First scheduled date, Start Time & Hours (Length of Schedule)
2. Client & Caregiver Names
3. Authorization for this recurrence
4. Check off what days of the week this recurring schedule will take place on. Each day checked will create it's own separate recurrence, meaning any updates will only impact that specific day of the week.
5. Select every 1 Week, 2 Weeks, 3 Weeks or 4 Weeks
6. Click **SAVE**
7. You will presented a popup asking: *Check for Errors Over the Next # of Recurrences?*
   - Click **Yes**

Doing this will check each day selected in the recurrence pattern for any conflicts or errors



How to Edit a Recurring Schedule

1. Right Click on the first day of the *Recurrence* you need to adjust (i.e. Start/End time changes, Caregiver change, etc.)
2. Left Click on **Recurrence**, **Edit the Recurrence**
3. Make the necessary changes and click **Save**
4. You will be prompted:
   - *Reset recurrence start date to <Date you edited> before regenerating occurrences*?
   - Click **Yes** to update the schedules going forward
   - System will then proceed to check for any warnings, errors or conflicts on the Caregiver or Client's calendar