



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

ADVANCED CLIENT AND CAREGIVER FEATURES

Learn the tricks of the trade for keeping track of important information about your clients and caregivers. Best practices for Required Dates, Skills and Qualifications will be covered.

The following features will allow you to use the Caregiver Suggestion tool to its fullest when you're looking for caregivers to fill a client's schedule.

Pre-Requisites:

- Setup for these features is done in the User Defined module. You have the ability to completely customize these features to meet your company needs.

Caregiver Module Features

Why use Qualifications?

Use Qualifications as a way to indicate your Caregivers' disciplines, or what types of service they are qualified to perform. When adding a new Caregiver into the system, you will select their Qualifications from this list. Caregivers may have multiple Qualifications. Qualifications are used by the system when matching caregivers to a schedule for a particular client. Qualifications work in tandem with Call Types.

When creating your Call Type master list, you may assign a Qualification to each Call Type. A Caregiver must have the Qualification that is assigned to the Call Type in order to provide the authorized care. A Caregiver who does not have the Qualification required by the Call Type will not be saved to any Schedule created with that Call Type. Also, the Caregiver Suggestion tool will not show Caregivers who do not have the qualification required by the Call Type on the Schedule.

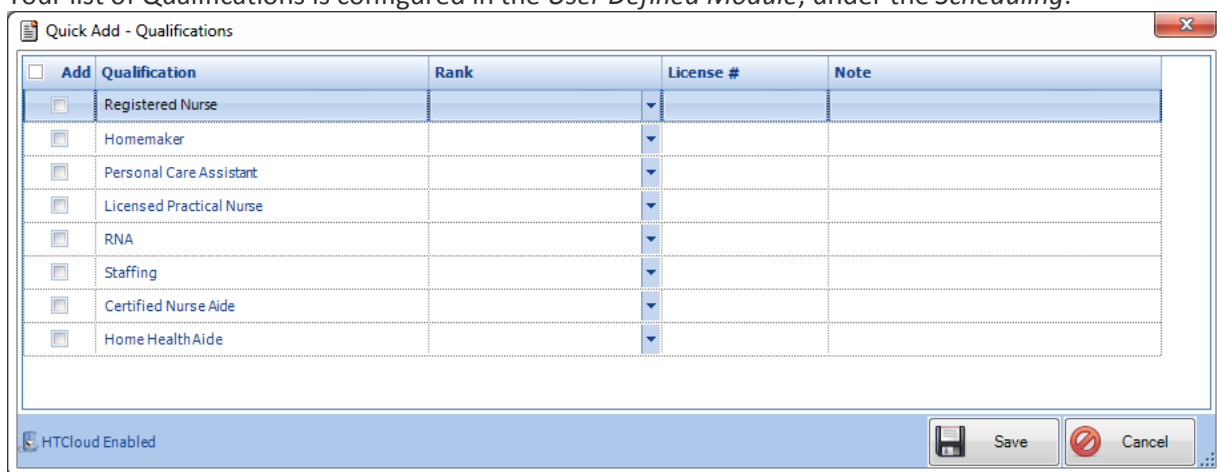
Qualifications are in the Caregiver Module under the Scheduling Setup tool. There are two methods to add a qualification:

- Click the **Add** button to add a single Qualification,
- or **Quick Add** to add several Qualifications at once.

Qualifications are prioritized in two ranks:

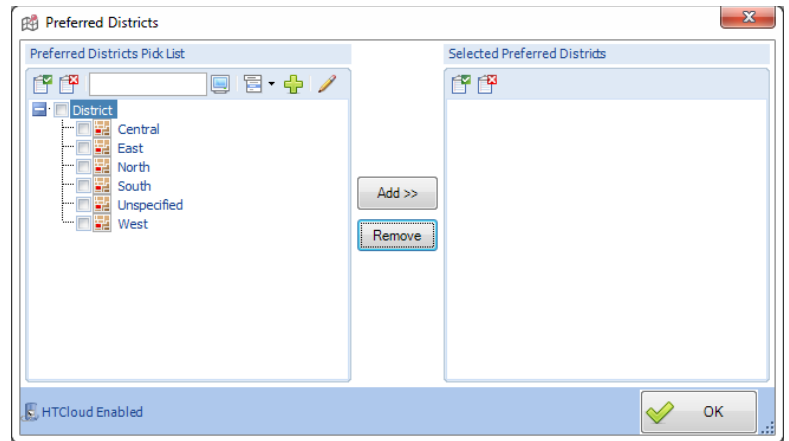
- **Primary Qualification:** This is usually the main qualification(s) for which the caregiver was hired to perform. Caregivers will most often be assigned to schedules that require their primary qualification(s).
- **Also Willing to Perform:** These are other qualification(s) the caregiver has and is willing to perform.

A Caregiver may have several Qualifications. Adding a license number or a brief note to the Qualification is optional. Your list of Qualifications is configured in the *User Defined Module*, under the *Scheduling*.



Why use Preferred Districts?

Preferred Districts indicate which district(s) of your company's service area that a Caregiver is willing to work. The Caregiver Suggestion feature can filter out Caregivers based on matching the Client's home District to the Caregivers' Preferred Districts. A Caregiver with no Preferred Districts specified will always be considered a match on all Districts. Districts can be city names, county names, or geographical quadrants. We recommend you stay away from using zip codes as this will be cumbersome to manage.



Your list of Districts is configured in the *User Defined Module*, under *Demographics* drop-down menu, then click *Location*.

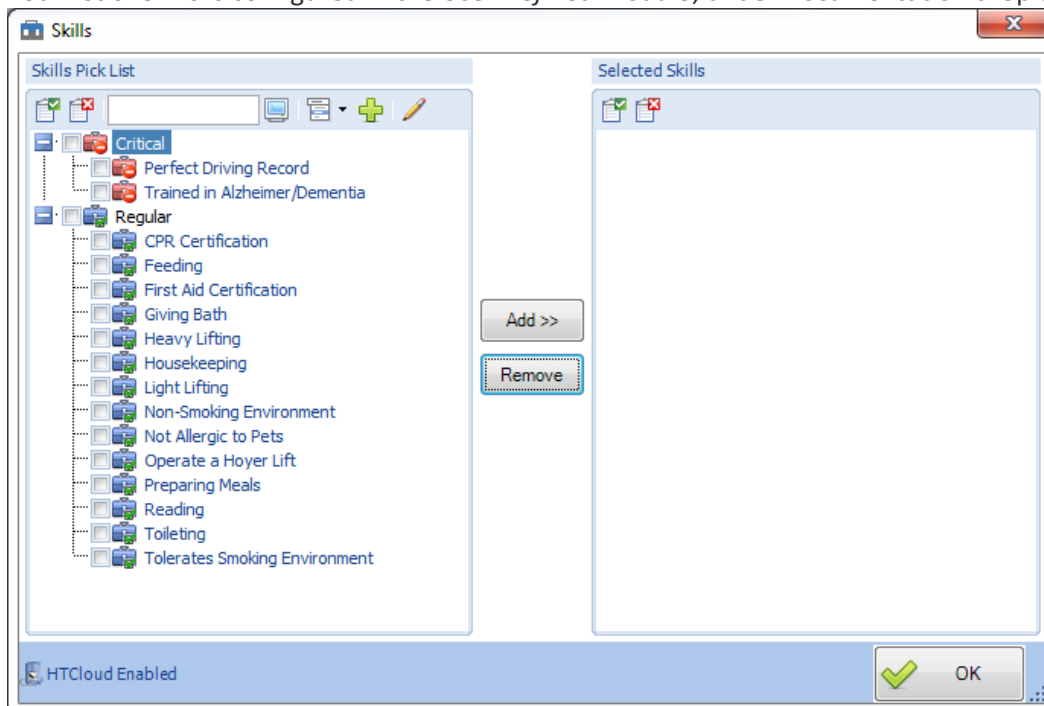
Why use Skills for Caregivers?

Record a Caregiver's relevant Skills. When scheduling Caregivers, their Skills are matched to those required by the Client and/or Authorization. The Skills that a Caregiver has, and those needed by a Client, have great impact on the scheduling process. While the Call Type represents the *type* of service to be performed, each Client and Authorization may also need unique skills. The system can match the Client's needs to a Caregiver's skills.

There are two types of Skills you can add to Client and Caregiver profiles. These are *Critical Skills* and *Regular Skills*.

- **Critical Skills** are those that a Caregiver *must* have in order to work with a Client who requires those Skills. Critical skills are used by the Caregiver Suggestion tool to schedule for a particular Client. You cannot schedule a Caregiver with a Client unless they possess all of the Critical Skills needed by the client.
- **Regular Skills** are less important, but still desirable to have, to work with the Client. The percentage of Regular Skills matching between a Client and Caregiver can be seen in the *Caregiver Suggestion* form. Missing Regular Skills does not prevent a Caregiver from being scheduled.

Your list of Skills is configured in the *User Defined Module*, under *Documentation* drop down menu then click *Skills*.



Why use Required Dates for Caregivers?

Use Required Dates to keep track of items that must be completed for or by a Caregiver.

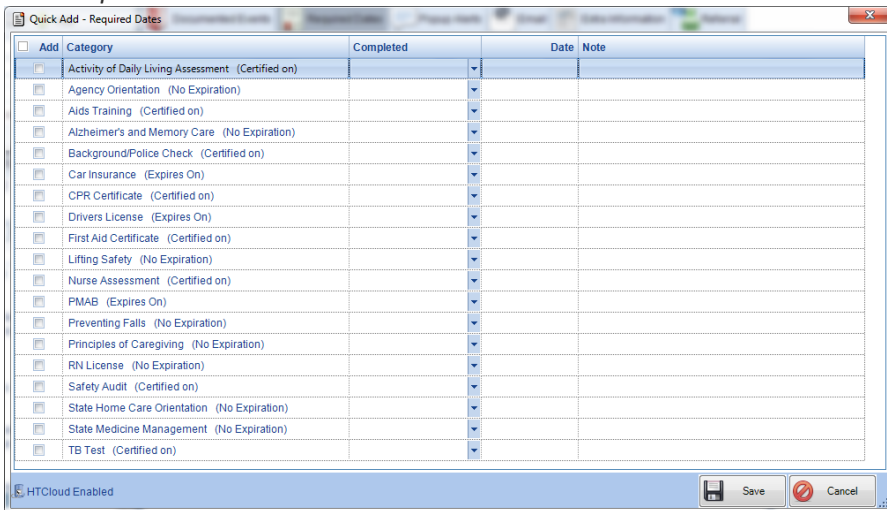
EXAMPLES: Orientations, Evaluations, First Aid Certification, Training Courses, etc.

The list of Required Date categories is maintained in the *User Defined* Module. The categories you create will represent the different requirements your company tracks, as well as their importance and when or whether they expire. Required Dates are specified as either Mandatory or Optional. If a Caregiver has an incomplete or expired Mandatory required date on their profile, you will receive warnings if you try to schedule that caregiver.

Required Date categories can be set to three types:

- **No Expiry:** These requirements are entered with the date they are completed. They do not expire.
- **Actual Date:** These requirements are entered with the date they are completed. They will automatically expire after a length of time that is specified for the requirement.
- **Expiration Date:** These requirements are entered with the date they actually expire, rather than the date the certification or requirement was completed.

Your list of Required Dates is configured in the *User Defined Module*, under *Documentation* drop-down menu, next click *Required Dates*.



Why use Event Reminders? (Cloud Users Only)

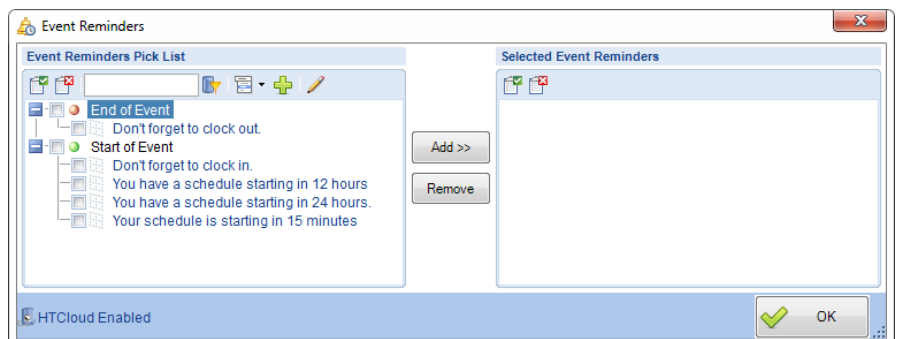
Use Event reminders to send reminder notices via SMS text to the Caregiver's cell phone in advance of events involving this person.

Event notices may be configured to send a set amount of time before or after the beginning or end of an event, and may be set to send for specific categories of Tasks or Appointments, or Schedules. Specific Schedule Call Types may be excluded from Alerting and Notices by editing the Call Type in the *Agency Office Module*.

NOTE:

You must have SMS Texting set up for your office to use this feature.

Your list of Event Reminders is configured in the *User Defined Module*, under *Scheduling*, drop down menu.



Caregiver Availability

HomeTrak Companion allows you to record when a Caregiver is available to work. The **Availability** feature is found in the Caregiver Module under the *Scheduling Setup* tool on the ribbon.

Use the panels on the right hand side of the screen to record availability. Click on the *Add* tool to add new Availability rules. Click *Edit* tool to change an existing rule. Click *Save* to see the rules in the Availability grid.

Availability Panels:

Working Days	Record the days of the week the Caregiver is available to work. Example: If a Caregiver never wants to work on the weekend, you would choose Saturday and Sunday to NOT be workdays.
Day Specific Availability	Record the time of day the Caregiver is available to work. Example: Every Tuesday, the Caregiver is only available from 9:00am to 5:00pm. NOTE: Day Specific Availability takes precedence over Working Days.
Date Specific Availability	Record when a Caregiver is available on a specific date. Example: On May 1, the Caregiver is only available from 9:00am to 1:00pm. NOTE: Date Specific Availability takes precedence over Day Specific Availability.

Client Module Features

Why use Skills for Clients?

Recording the Skills needed by a Client is driven by the type of care the Client requires. Skills added to a Client's profile or Authorization represent the Skills that a Caregiver must possess to work with this Client. The Skills that a Caregiver has, and those needed by a Client, have great impact on the scheduling process. While the Call Type represents the *type* of service to be performed, each Client and Authorization may also have unique specific requirements. The system can match the Client's needs to a Caregiver's skills.

There are two types of Skills you can add to a Client and Caregiver profiles. These are *Critical Skills* and *Regular Skills*.

- **Critical Skills** are Skills that a Caregiver *must* have in order to work a Schedule requiring those Skills. Critical Skills are used by the Caregiver Suggestion tool to filter out Caregivers who do not meet the requirements to work with a particular client. You cannot save a Caregiver to a Schedule unless they possess all of the Critical Skills required by the Client and/or Authorization.
- **Regular Skills** are less important, but still desired to work with the Client. The percentage of Regular Skills matching between a Client and Caregiver is seen in the *Caregiver Suggestion* form. Missing Regular Skills does not prevent a Caregiver from being scheduled.

Skills required by a Client may be Client-Specific or Authorization-Specific.

- **Client-Specific Skills** are added directly to the Client. These Skills are always needed by the Client, no matter what service is being performed.
- **Authorization-Specific Skills** are added directly to an Authorization. Add these skills only if you have multiple Authorizations for different types of services for a Client, and different Skills are needed for each service. Authorization-specific Skills do not override the Skills needed by the Client. Rather, the Authorization-specific Skills are added to those already needed by the Client when matching Caregivers to a Schedule.

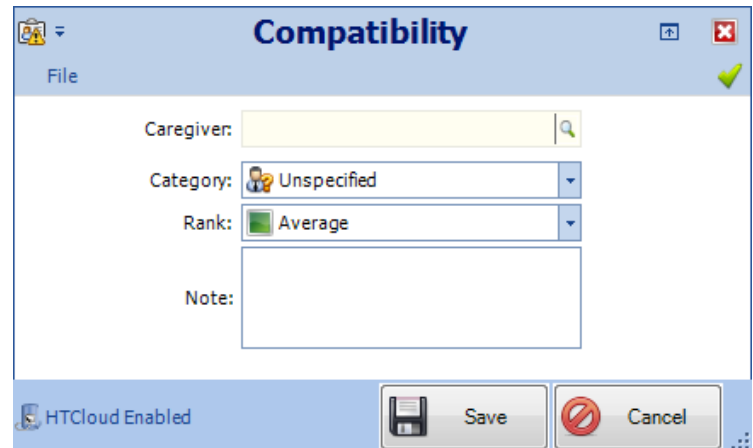
Your list of Skills can be configured in the *User Defined Module*, under *Demographics*, then *Relationship Categories* drop down menu.

Why use Compatibility?

You can specify relationships between this Client and Caregivers, indicating the Caregivers who are preferred by the Client. If the Client likes a Caregiver, you can add that Caregiver as *Preferred* by this Client. If the Client dislikes a Caregiver, you may add that Caregiver as *Not Preferred*. (You might also add the Caregiver as *Not Preferred* if they did not like the Client.)

The Client's Caregiver Compatibility relationships will be visible when setting up schedules for this Client, but will not cause errors or prevent you from saving schedules.

Preferences are also indicated in Caregiver Suggestion with any compatibility included in the description column and highlighted a different color to stand out. A Preferred or Not Preferred compatibility may also adjust the scoring of the caregiver in the results.



When creating or editing Caregiver Compatibility categories in the User Defined master list, a scoring value may be specified for the category. Altering the scoring values of your compatibility categories allows you to influence the rank and order of caregivers returned in Caregiver Suggestion.

By default, the included Preferred and Not Preferred categories will default this scoring to 1 and -1 respectively. This can be adjusted to give greater weight to the compatibility in Caregiver Suggestion, and you can additionally add further categories of compatibility of different strengths to indicate different levels of preferences (either for specific management and scheduling purposes, or to simply identify which caregivers the client likes the most, depending on your office's scheduling needs.)

Only or Never Send Particular Caregivers

This scoring also supports the following "magic numbers" to trigger special effects (in addition to strongly affecting the ranking in Caregiver Suggestion):

1000	<p>If there is a listed Caregiver Compatibility with this scoring, only Caregivers with this scoring should be sent to work with the Client.</p> <p>If the Client has at least one Caregiver Compatibility record of a category with this scoring, then scheduling any other Caregiver without this type of Compatibility will cause a "<i>Caregiver Not Recommended</i>" warning to be generated on the schedule.</p> <p>Use this for situations where your office required Caregivers to be specifically introduced or trained with a particular client to work with them. The Caregiver Compatibility can be used to mark those Caregivers that have received the required training or introduction to work with this Client, and other Caregivers should not be sent to this Client if they do not have this type of Compatibility.</p>
-1000	<p>If there is a listed Caregiver Compatibility with this scoring, that Caregiver should never be sent to work with this client. If this Caregiver is scheduled with the client, a "<i>Caregiver Not Recommended</i>" warning will be generated on the schedule.</p> <p>Use this for Caregivers that your Client strongly disliked or is unsuitable for any other reason to ever work with this particular Client again.</p>

Your list of Compatibility categories can be configured in the *User Defined Module*, under *Demographics*, then *Relationship Categories* drop down menu.

Why use Required Dates for Clients?

Use Required Dates to keep track of items that must be completed for or by a Client.

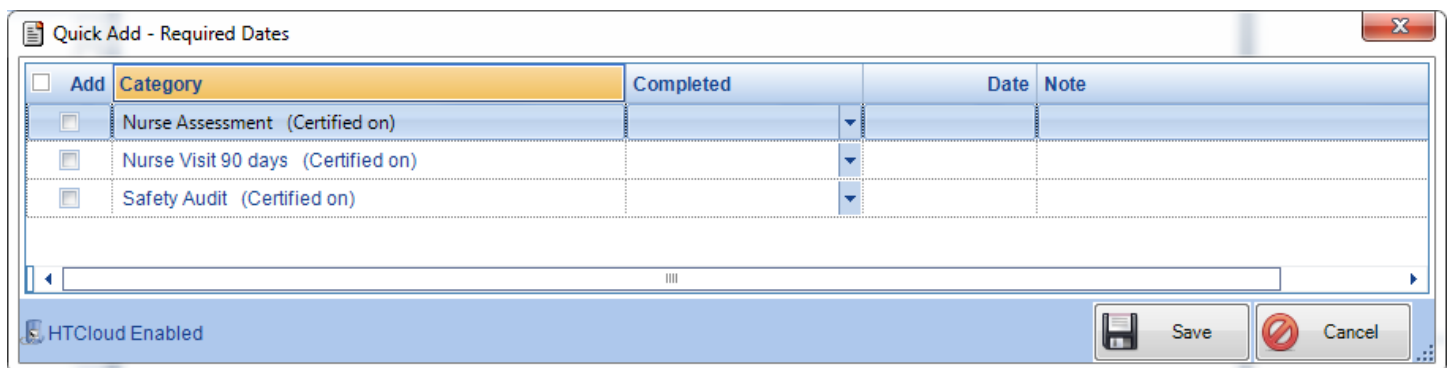
EXAMPLES: Orientations, evaluations, home visits, insurance expiration dates, etc.

The list of Required Date categories is maintained in the *User Defined* Module. The categories you create will represent the different requirements your company tracks, as well as their importance and when or whether they expire. Required Dates are specified as either Mandatory or Optional.

Required Date categories can be set to three types:

- **No Expiry:** These requirements are entered with the date they are completed. They do not expire.
- **Actual Date:** These requirements are entered with the date they are completed. They will automatically expire after a length of time that is specified for the requirement.
- **Expiration Date:** These requirements are entered with the date they actually expire, rather than the date the certification or requirement was completed

Your list of Required Dates is configured in the *User Defined Module*, under *Documentation* drop down menu.



Using these feature will allow you to use the *Caregiver Suggestion* tool to find an appropriate Caregiver who can work a schedule.

The Caregiver Suggestion tool can take into account many different criteria, including the Caregivers' Qualifications, Skills, Preferred Districts, Languages, Availability, and the Preferred Gender on the Authorization.

You can also choose to filter on Caregiver Category and Classifications while suggesting Caregivers for the Schedule.

