# HOMETRAK COMPANION

## CAREGIVER SUGGESTION & PENDING CAREGIVER FEATURES

# How Caregivers are matched with Clients

When you enter a caregiver into a schedule, the system automatically initiates checks to see how well the selected caregiver fits the requirements of the client, using the information entered into the client and caregiver modules.

The system uses many criteria when performing these checks; it quickly scrolls through each check and can evaluate the match. The system can check such things as whether the caregiver is active or available, whether the caregiver has the Critical Skills required by the client, or whether they have the needed Qualification for the type of work performed for the Client. The system will generate warnings if it detects a mismatch between the caregiver information and client requirements. The Warnings and Errors will appear in the Detail Panel of the schedule under the section titled Please Review.

For specific Warnings and Errors, the system can be configured to NOT allow the caregiver to be saved in the schedule if it is detected that the caregiver did not meet the criteria.

You can configure which Warnings and Errors the system will check in the Warnings and Errors tool found in the *User Defined Module* under *With Support's Advice*. Within the Warnings and Errors section of the User Defined Module, you can specify which Warnings and Errors items are to be performed. (Calculate the Error)

You can also specify what the system should do if it performs a check and encounters a warning or error.
- You may specify that the system will not allow the schedule to be saved with that Caregiver in it. (Block Save of Schedules)
- Or the system can prompt to indicate that it encountered an error but still allow you to save the schedule with that caregiver in it. (Prompt on Save)
- Or you can save the schedule with that Caregiver in it and simply display an error in the Warnings and Errors panel in the schedule. (Display in Errors List)


Example of Warnings and Errors setup screen

Prior to entering a caregiver into the schedule, you may wish to use the Caregiver Suggestion tool to find an appropriate caregiver who can work the schedule. This powerful tool can evaluate multiple caregivers to determine the best possible match for the schedule. This will ensure that the caregiver added to the schedule is an appropriate match in terms of qualifications and availability before you add them to the schedule. Using the Caregiver Suggestion tool will reduce the number of Warnings and Errors in your scheduling process.
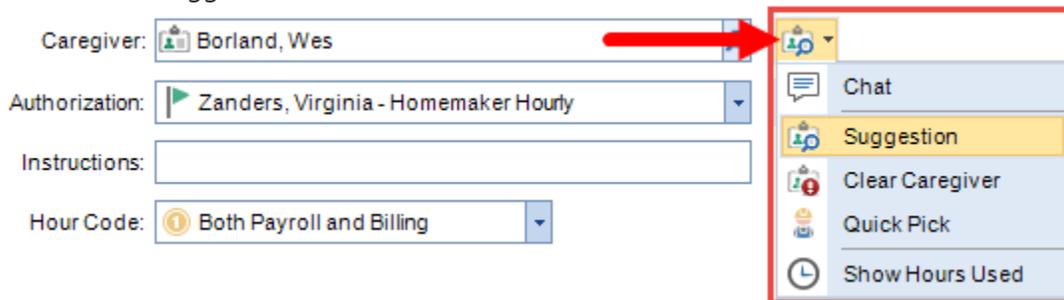
# Find a Caregiver for a Schedule (Caregiver Suggestion)

Use Caregiver Suggestion 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.

There are numerous ways to access the Caregiver Suggestion tool. Let us look at the options:

**Method 1 - From any Add/Edit a Schedule Screen:**
- While adding or editing a new single schedule or editing an existing schedule, click on the *Caregiver* menu then click *Suggestion.*



**Method 2 - From the Client or Caregiver Calendars:**
- Open the calendar for the person for whom you have a schedule for which you need to find a caregiver.
- Click on the schedule in the calendar for which you wish to use Caregiver Suggestion.
- Click on the *Suggestion* tool on the toolbar.



**Method 3 - From any Calendar or the Schedule Review Module:**
- Open the calendar for the person for whom you have a schedule for which you need to find a caregiver.
- Right click on the schedule in the calendar or grid for which you wish to use Caregiver Suggestion to show the context menu.
- Under Caregiver Options, click on the *Suggestion* tool.
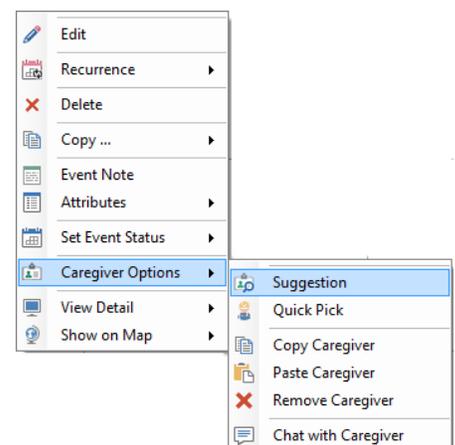


**Method 4 - From the Schedule Review Module:**
- Open the Schedule Review Module and click *View Data* so the Main Display Grid is loaded.
- Click on the schedule in the grid for which you wish to use Caregiver Suggestion.
- Click on the *Suggestion* tool in the toolbar at the top of the grid.
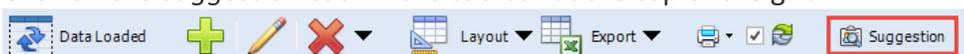
**THEN. . .**

The *Caregiver Suggestion* screen will open.

**Viewing the Results:**

Suggested Caregivers will be listed in the *Suggested Caregivers* tab in the grid portion of the screen. You can determine the suitability of a caregiver by the information displayed in the columns in the grid.



The detail panel to the left of the grid shows the **Client's criteria** from the schedule that may influence the Suggestion, such as Client's Language, District, required Qualification and Skills etc. You can also use the icons at the bottom of this panel to display detailed information on the Client or currently selected Caregiver.

The **Score** column in the suggestion grid displays a ranking, which is calculated specifically for each caregiver indicating their suitability for this schedule. The higher the score, the higher the suitability. The score is calculated based on a points system; different criteria have different point levels associated with them. The score displayed for the caregiver is the sum of the points for all criteria.

Use the other tabs in the grid display area to view schedules for selected caregivers on a *Timeline* or in a *Day View* or to see who has been *Previously Scheduled* with the client.
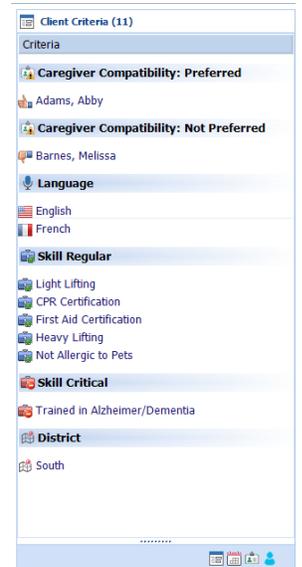
**To adjust the results:**

Changing the **Filter Options** allows you to control which caregivers are returned as suggestion results.
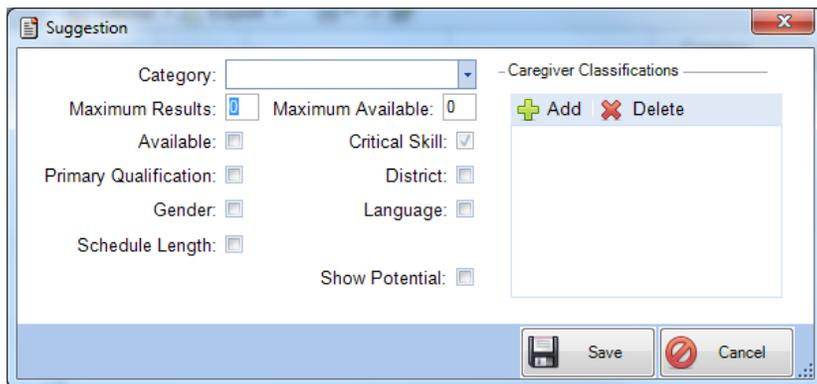


By adjusting the Filter Options you can choose not to show any caregivers that do not match specific criteria and narrow your results. Conversely, if you are having a hard time finding a suitable caregiver you can remove certain filters to widen your search.

The following options are available:

| Category | Only show Caregivers matching a specific Category. |
|---|---|
| **Maximum Results** | Limit the number of Caregivers returned in the Suggestion Grid. This will speed up Suggestion but may hide some qualified caregivers. |

| | |
|---|---|
| **Maximum Available** | Limit the number of returned Caregivers in the grid for which Availability will be evaluated. This will speed up Suggestion, but if many Caregivers are returned, some may have their availability reported as "Unknown". |
| **Available** | Only show Caregivers that are Available at the time of the schedule.<br><br>**Note:** Filtering on Availability may slow down Suggestion. |
| **Primary Qualification** | Only show Caregivers who have the Qualification required by the Schedule's Service (Call Type) listed as "Primary" (not "Also Willing to Perform").<br><br>**Note:** If the Caregiver is not Qualified, they will never be returned. |
| **Gender** | Only show Caregivers that match the Preferred Gender on the Client's Authorization. |
| **Schedule Length** | Only show Caregivers that have preferred Schedule Lengths covering the length of the schedule.<br><br>**Note:** If the Caregiver has no listed preferred Schedule Lengths, then they will always be a match on Schedule Length. |
| **Critical Skill** | Only show Caregivers that have all of the Critical Skills required by the Client and/or Authorization. Caregivers may be missing some or all of the Regular Skills required and still be returned.<br><br>This option cannot be unchecked. |
| **District** | Only show Caregivers that have the Client's District listed under their Preferred Districts.<br><br>**Note:** If the Caregiver has no listed Preferred Districts, then they will always be a match on District. |
| **Language** | Only show Caregivers that have the same Language as the Client listed on their profile. |
| **Show Potential** | Include Potential Caregivers in the results. |
| **Caregiver Classification** | Only show Caregivers with specific Classifications. Caregivers matching any of the specified Classifications will be returned. |

You can also use the *Toggle Unavailable* tool on the Caregiver Suggestion ribbon to show or hide Caregivers in the grid that are Unavailable for this Schedule. (If not already pre-filtered on Available.)


**Calculate Distance Options:**

Caregiver suggestion also provides tools to find the closest suitable caregiver to the schedule.

Use the *Calculate Distance* tool to display the driving time and distance to and from this schedule from the caregiver's home or previous/next schedule for each selected caregiver. Distance and travel will be automatically calculated using HomeTrak's Trips directions service and be displayed in the appropriate

columns in the grid. You can then sort the grid based on the distance column to see which qualified caregivers are nearest the schedule.

You can also use the *Map Highlighted Caregiver* to view the selected caregiver's address on a map.

**Using Caregiver Suggestion with the Pending Caregivers feature:**

In most cases, you will use Caregiver Suggestion to find several suitable caregivers to contact and offer the schedule. You can easily use Caregiver Suggestion to add the list of appropriate available caregivers for this schedule and keep track of how and when caregivers have been contacted to offer the schedule, and which caregivers accept or reject the schedule.

You can use these tools to simply add Caregivers to the list of Pending Caregivers for this schedule for later follow-up, or the tool can be used to actually send an email or text notification to the selected caregivers informing them of the open schedule. (This will also add them to the list of Pending Caregivers with a status to indicate that the message was sent.)

For more information on using the Pending Caregivers features see the document Using Caregiver Suggestion to Notify Caregivers of an Available Schedule.

You must have the email capabilities setup in HomeTrak Companion to fully utilize this feature. The content and amount of detailed schedule information included in the sent emails can be configured in the Agency Office Module, Systems Overrides tool, Settings option. The emails will always include the Event ID of the schedule, which you can use in the Quick Schedule Edit feature on the Schedule Review and Calendar Modules to quickly find and edit this schedule when the caregiver responds to the offer.

**To select and save a Caregiver to the Schedule:**

Highlight the desired Caregiver in the grid and click Save to close the Caregiver Suggestion window and save the selected caregiver to the schedule.

To close suggestion without saving this caregiver to the schedule, click Cancel.

## Using Caregiver Compatibility

The Caregiver Compatibility in Companion is a way to link particular caregivers and clients in your system to indicate client preferences or otherwise assist in managing your scheduling by creating specific sets of caregivers to preferentially choose from when creating schedules with your clients.

**Recording Compatibility**

Caregiver Compatibility is found in the Client Module under the Scheduling Setup menu on the ribbon.

When adding a compatibility record to a client, you will choose from your list of caregivers and choose a category (i.e. Preferred, Not Preferred, etc.) to indicate this relationship to the client.

**Editing Schedules**

When creating a schedule for a client, any applicable Caregiver Compatibility is included in the *"Please Review"* panel at right (along with Warnings and Errors and other important information), and if the Caregiver

currently selected in the schedule is in a compatibility with that client, the icon from the compatibility category is also shown beside the caregiver's name in the field as an indicator.
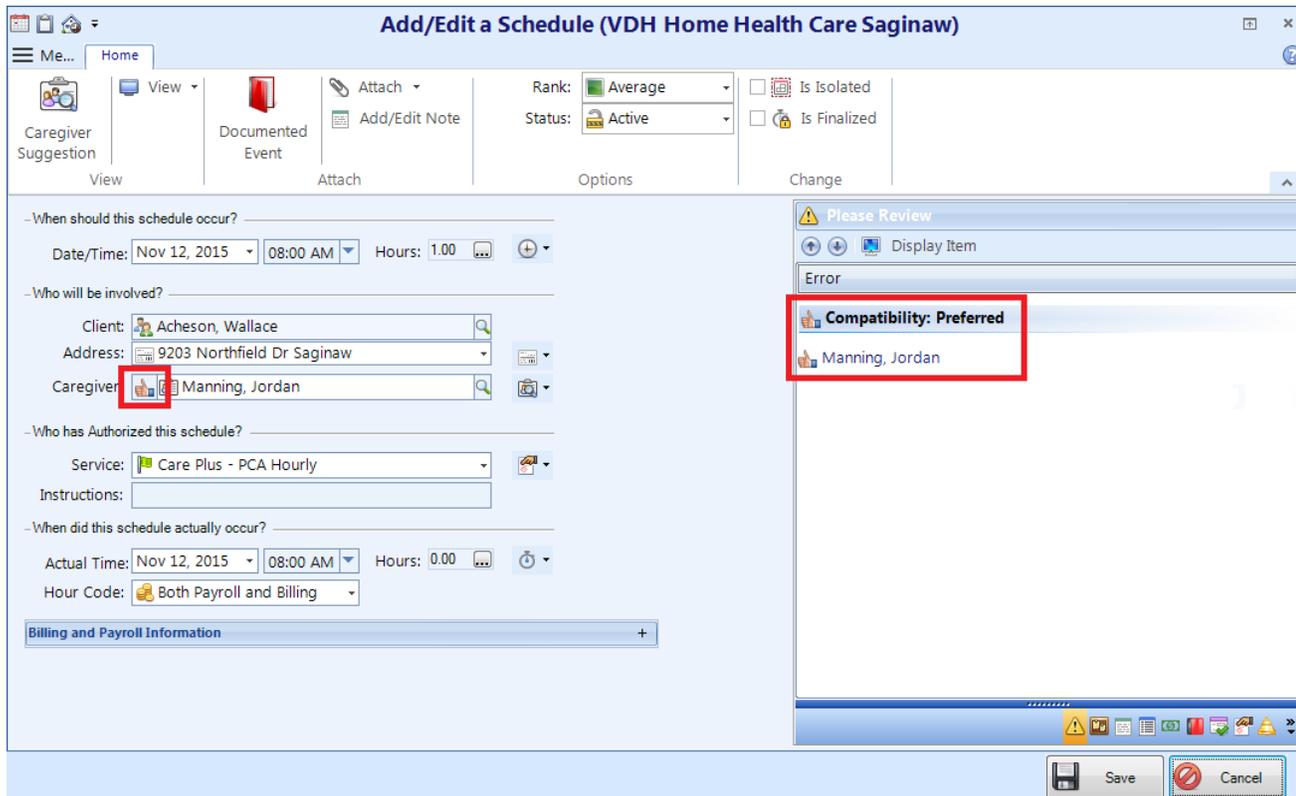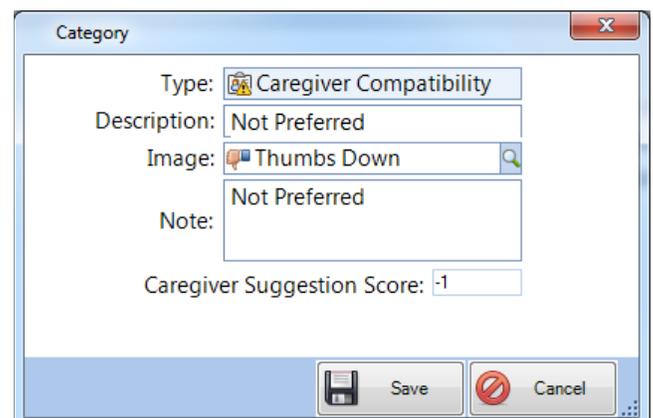


## Impact to Caregiver Suggestion

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.

## Caregiver Suggestion Scoring

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** | If there is a listed Caregiver Compatibility with this scoring, **only** Caregivers with this scoring should be sent to work with this Client. |
| | 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 "*Caregiver Not Recommended*" warning to be generated on the schedule. |
| | 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. |
| **-1000** | 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 "*Caregiver Not Recommended*" warning will be generated on the schedule. |
| | Use this for Caregivers that your Client strongly disliked or is unsuitable for any other reason to ever work with this particular Client again. |

## Using Caregiver Suggestion to Notify Caregivers of an Available Schedule

Sometimes you may be trying to find a caregiver to fill an open schedule that is coming up soon and has still not been filled, or the original caregiver has been removed for some reason (called off sick for example). You may not in this case wish to simply choose a caregiver to put into the schedule, as you have not been able to yet confirm a caregiver's availability or notify them of the schedule.
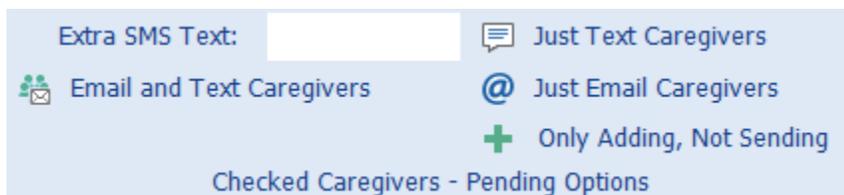


Once you have used the Caregiver Suggestion tool to find the appropriate caregivers for a schedule, you can use the options on this same screen to send out a notification to the selected caregivers that a schedule is available.

To send out and **email and text message** (if your company is set up with texting abilities) to the selected caregivers to notify them of an available open schedule. You can add a personalized message in the text by entering text into the *"Extra SMS Text"* field. This will be added to the end of the standard notification text that is sent out. If your company does not have the SMS texting features set up, this will just send emails.

To just send out texts and not email the caregivers, use the *"Just Text* **Caregivers"** tool.

To just send out emails and not text the caregivers, use the *"Just Email Caregivers"* tool.

You must have the email capabilities setup in HomeTrak Companion to fully utilize this feature. The content and amount of detailed schedule information included in the sent emails can be configured in the Agency Office Module>Overrides>System Overrides tool.  The emails will always include the Event ID of the schedule, which you can use in the Quick Schedule Edit feature on the Schedule Review and Calendar Modules to quickly find and edit this schedule when the caregiver responds to the offer.

You must have the SMS texting capabilities setup in HomeTrak Companion to be able to text pending schedule information to your caregivers.

If you do not use, or do not wish to use, either the email or texting features of Companion and want to contact the caregivers directly, you may also choose to simply add the checked people as Pending Caregivers to the schedule by clicking on the **"Only Adding, Not Sending"** tool. You can then record the history of any follow-up calls on the schedule using the Pending features.

## Keep Track of the Caregivers who have been Offered Schedules

A pending caregiver is one who has all the necessary qualifications to fill a needed schedule. They are *pending* because you have contacted them either verbally or via email to advise them of an available schedule. You can add Pending records manually to any schedule, and you can also quickly add multiple caregivers as Pending using the *Caregiver Suggestion* tool.

*Pending Caregivers* allows you to track many caregivers simultaneously when trying to fill a schedule. You will be able to document who you have contacted, when they were contacted, and their response to the proposed schedule.

### Pending Caregivers with Caregiver Suggestion

When editing a schedule you can use the *Caregiver Suggestion* tool to find the most appropriate caregiver(s) to fill an open schedule. The *Caregiver Suggestion* screen has tools to Bulk Add selected caregivers to a schedule as Pending.

This is the easiest and most reliable way to find appropriate caregivers for the schedule and quickly add those caregivers as Pending, and is generally the recommended process for doing so. Once a caregiver is added through *Caregiver Suggestion*, you will use the *Pending Caregiver* tools as described below to track and update these pending records.