



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

RELATIONSHIPS: CAREGIVERS

VERSION 6.3

Caregiver Module:

From the **Main Module**, click the **Relationships** icon, then click the [Caregivers](#) tab.

Click **Add** on the Scenarios Panel on the left-hand side of the screen.



All fields are optional except for the *Name*, *Status*, and *Status Date* fields.

- ⓘ Remember to select the appropriate status for the Caregiver and adjust the *Status Date* if needed. (By default, the *Status* is Received Application (Potential) and the *Status Date* is today's date.) To be able to add the Caregiver into schedules prior to today's date, you must backdate the Active Status Date.

NOTE: The Caregiver *must have* a current status of **ACTIVE** to be added as the caregiver in a schedule.

Caregiver Profile Information Screen

You may want to indicate the **Maximum Hours per Week** (how many hours the caregiver wants to work for you) or whether the Caregiver is willing to work on **Holidays**. Using these features will assist you in scheduling.

You can add a **Picture** to the Caregiver's profile, which can be used to create a *Name Badge* using the Name Badge report.

If the caregiver speaks multiple languages, you can add them to the **Language** section of the profile. Using the *Caregiver Suggestion* feature gives you the option of matching caregivers and clients by the languages they speak.

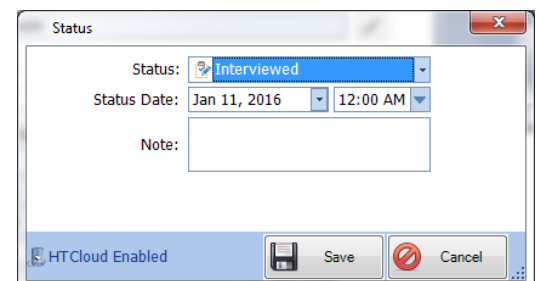
If you are using QuickBooks Desktop version to process the caregiver's payroll, you can export their name and address information using the **QuickBooks** menu found on the ribbon of the profile. This saves you from having to manually enter their profile information into QuickBooks.

What information to capture when you are Assessing (Interviewing) your Caregiver

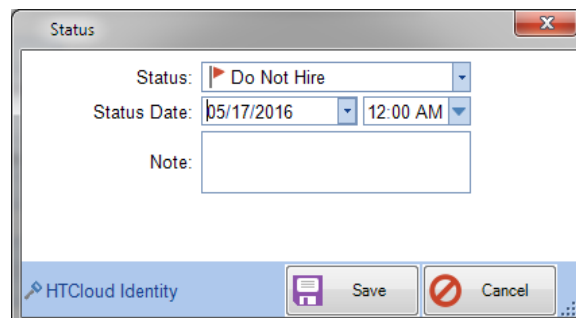
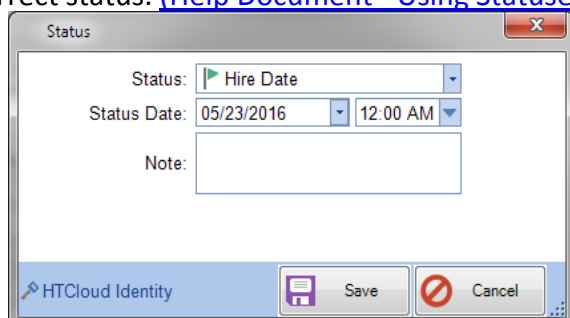
Demographic Menu:

1. Change their Status from Received Application (Potential) to Interviewed.

After interviewing the caregiver, you will want to add their **Status** to *Assessed* or *Interviewed* with the *date and time the interview occurred*. To do so, go to the Profile screen. On the right-hand side of the screen, click the **Add** button under the title Status. Next, click the drop-down for status and select either *Assessed* or *Interviewed* from the list. Add the **Status Date** and **Time** to when the interview took place. Click Save.



Once the interview has been completed you have two options: **Hire** or **Do Not Hire**. It is up to you to choose the correct status. ([Help Document - Using Statuses](#))



Demographic Menu:

Relationships: (found under Demographic Menu)

- It is a good practice to add the Emergency Contact
- You may also choose to add a specific Manager from your office who may be managing this Caregiver (This is optional)

Scheduling Setup Menu:

If you need to set up unique Payroll Rates and Options you will do so here for each individual Caregiver. If your rates Do NOT vary from Caregiver to Caregiver, then you will enter the rates in the Agency Office.

How to Add Payroll Rates for a Caregiver

In the *Human Resource or Caregiver Module* you will select the **Caregiver** for whom you want to setup a **Payroll Rate**.

Next, click the *Scheduling Setup* menu, then select the **Payroll Rates** option from the menu.

Then, click the **Add** button on the toolbar. The *Payroll Rate* screen will appear.

There are three levels of payroll rates you can setup.

1. If your caregiver gets the same rate no matter what type of service or client they are scheduled for. Then you can setup a Rate-Type specific Payroll Rate. Choose the Rate Type and leave the call type and specific person field's blank.
2. If your caregiver gets different rates for different types of service but it's not client-specific then you can setup a Call Type specific Payroll Rate. Choose the Rate Type and Call Type but leave the specific person field blank.
3. If your caregiver gets different rates for a specific service with a specific client then you can setup a Client-specific Payroll Rate. Choose the Rate Type and Call Type and in the Specific Person field fill in the client's name. Use for exceptions only.

When Payroll is calculated, the most specific rate available will be chosen. Example: Client-specific first, then Call Type-specific, then Rate Type-specific. ([Help Document – Payroll Rates](#))

The image displays three sequential screenshots of the 'Payroll Rate' configuration window, illustrating different levels of specificity:

- Screenshot 1: Rate-Type Specific**
 - Valid From: May 01, 2016 To: May 10, 2026
 - Rate Type: Hourly (highlighted with a red box)
 - Call Type: (blank)
 - Specific Person: (blank)
 - Rate: \$9.000
- Screenshot 2: Call Type Specific**
 - Valid From: May 01, 2016 To: May 10, 2026
 - Rate Type: Hourly
 - Call Type: PCA Hourly (highlighted with a red box)
 - Specific Person: (blank)
 - Rate: \$12.000
- Screenshot 3: Client-Specific**
 - Valid From: May 01, 2016 To: May 10, 2026
 - Rate Type: Hourly
 - Call Type: PCA Hourly
 - Specific Person: Jackson, Bo (highlighted with a red box)
 - Rate: \$15.000

Payroll Options

Default Payroll Options for new caregivers can be established in the Agency Office Module. When you add a new caregiver, these Payroll Options are added to their profiles by default. You can always edit the Payroll Options to make specific changes for that individual. ([Help Document – Payroll Options](#))

Add their Qualifications (if you are using this feature).

Use the **Qualification** screen to record the Caregiver's Qualifications and rank them as 'Primary'.

ⓘ Remember if you are using Qualifications, they will be tied to your Call Types. If a caregiver does not have the necessary Qualification for the Call Type, they cannot be assigned to a schedule.

Qualifications are in the Human Resources or Caregiver Module under the *Scheduling Setup* menu on the ribbon. Click **Multi-Add** to add Qualifications.

Qualifications are prioritized in two types:

- **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. Here is an example of the Qualifications *Multi-Add* screen.

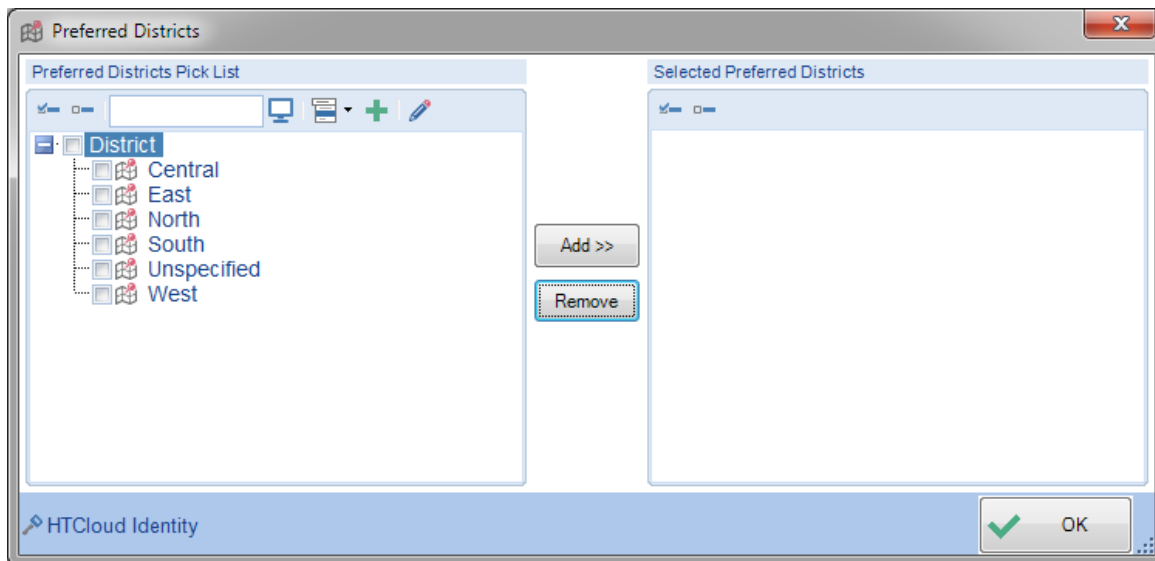
Preferred Districts (if you are using this feature).

If your office serves a larger geographic area, you can create and assign districts to break up your office's service area into smaller regions.

Establish your master list of Districts in the *User Defined Module*, under *Demographics*, then under the *Location* drop down menu tool. Once you have established your master list, you can select a District any time you edit or add an address in the system.

You can use the [Preferred Districts](#) tool in the *Human Resources or Caregiver Module* to indicate areas in which a Caregiver is willing or able to work. To access the Preferred Districts tool, open the *Human Resources or Caregiver Module* and click on the Scheduling Setup menu, then click on Preferred Districts.

Click Choose to select the district(s) that a Caregiver is willing or able to work in. Place a checkmark in the box beside the desired district(s) and click Add then OK.



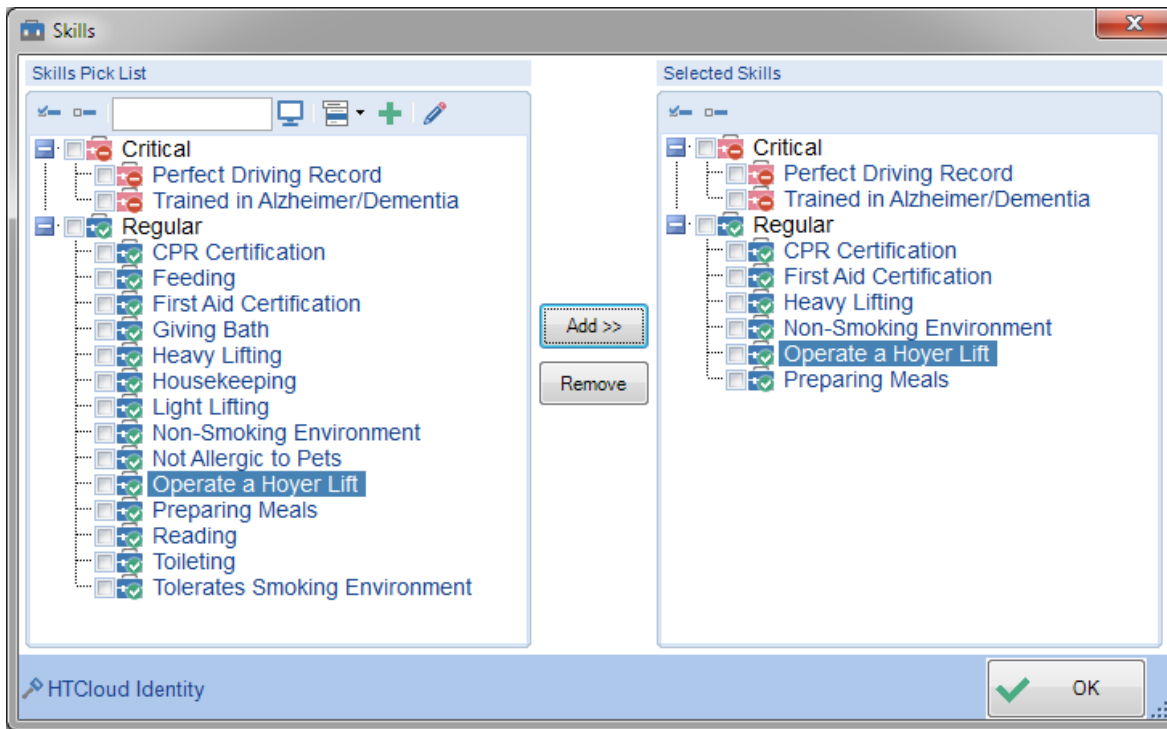
Skills (if you are using this feature).

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 Quick Pick 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 *Quick Pick* form. Missing Regular Skills does not prevent a Caregiver from being scheduled.



Event Reminders (if you are using this feature).

Companion allows you to configure event reminders that can be sent via SMS text message to remind them of upcoming events, or could also be used as a reminder to clock in or out of an event with telephony.

You must be using HomeTrak's cloud hosted solution and have a valid texting number set up on your office to use this feature. You may need to contact HomeTrak to configure this feature and extra charges may apply to texting.

Configuring the Reminders

The master list of reminder messages is found in the *User Defined Module*, under the Scheduling sub-menu, Event Reminders tool.

A reminder can be set from either the start or end of the event. Event Reminders may be configured and applied to either a task, appointment or schedule category. If no event category is specified, this reminder will be sent out for any events on the caregiver's calendar.

Note: There is only one category for Schedule, but specific Call Types can be excluded from Alerting and Reminders.

You may also use specific tags to dynamically include information in the reminder such as the Client's name or event category. See also [Embedding Information into a Text Message](#) for information on how to use these tags and the specific tags available.

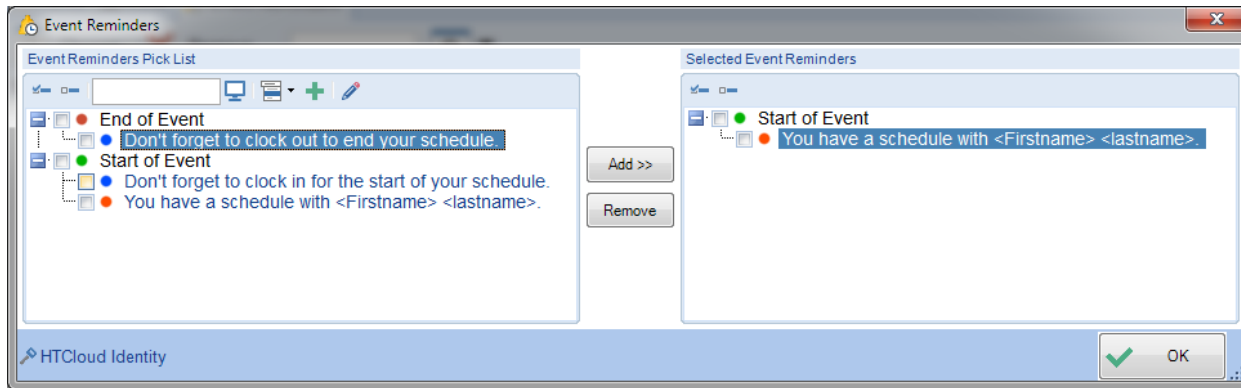
Excluding Certain Schedule Call Types from Alerts and Reminders

To exclude a specific Call Type from sending reminders, edit the Call Type in the *Agency Office Module*, *Call Types* tool. Check the box that indicates "Exclude from Alerting and Reminders". This will prevent both Event Reminders and Telephony Alerts for schedules of this Call Type.

Adding a Reminder to a Person

Event Reminders are added to Caregivers in the *Caregiver Module*, or Office Staff in the *Office Staff Module*, using the Event Reminders tool under the Scheduling Setup dropdown on the ribbon.

Click Choose on the toolbar to bring up the pick list of Event Reminders. Select the desired reminders and add them to the caregiver and click OK.



Add their Required Dates (if you are using this feature).

Using this feature allows you to keep track of and run reports on date sensitive requirements that are due to expire or you would like to record their completion date. This allows you to stay on top of assessments, expiring licenses or certifications, etc. *Companion* can also generate letters for your caregivers to remind them of expiring dates.

The Required Dates screen is found under the Documentation Menu. Next, click the **Add** button to add a single Required Date, or **Multi-Add** to add several Required Dates at once.

The list of Required Dates categories is setup in the User Defined Module. Each Required Date in this list is ranked as either Mandatory or Optional. If a Caregiver has an incomplete or expired Mandatory Required Date on their profile, you will receive a warning if you try to schedule that caregiver. Here is an example of the Required Dates *Multi-Add* screen.

