



Scheduling in HomeTrak Companion

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HomeTrak Terms of Reference

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

APPOINTMENTS are events that block time on your calendar. Overlapping appointments will provide an alert icon on your calendar. (See next slide).

**** You CANNOT bill or pay for Tasks or Appointments ****

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 for the client.

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

- 1. Document significant events (good or bad) involving clients and/or caregivers**
- 2. 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 HOMETRAK

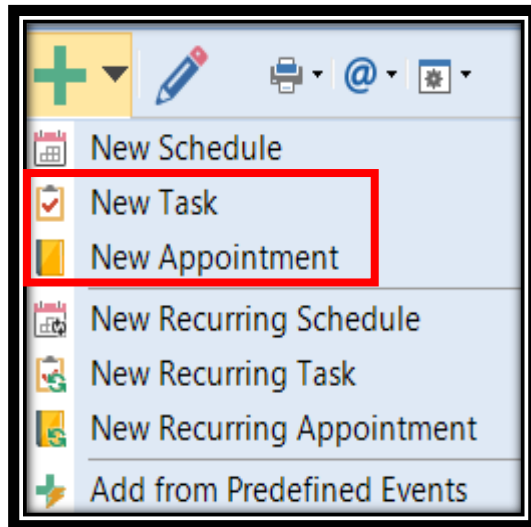
	Indicates the schedule either has a status of Office Alert, has No Caregiver Selected, or is in conflict with another schedule.
	A Note has been added to the schedule.
	An Extra Charge item has been added to the schedule.
	An Attribute has been added to the schedule.
	This schedule is isolated from the 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

Main Module → Relationship Management → Office Staff tab → Scheduling → Calendar

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

Left Click Option

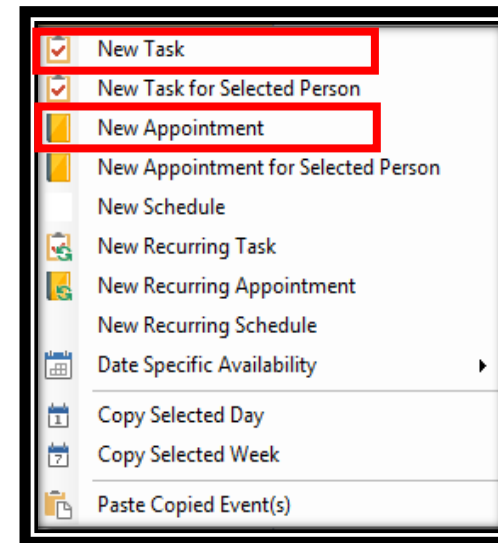


Left Click on the day you want to create a schedule so it's highlighted.

Click on the drop down arrow beside the '+' symbol in the tool bar to generate a list.
Click on **New Task** or **New Appointment**

OR

Right Click Option



Right Click on the day you wish to create a schedule. You will be presented with this drop down list of options.

Click on **New Task** or **New Appointment**

Adding Tasks & Appointments (Continued)

Setup a Task (Support Demo)

Reminder: Notices Status: Active

Date/Time: Dec 06, 2016 08:00 AM 1.00

Person: Albright, Mary

Address: 3684 Fairmount Ave San Diego

Involved: Pat

Category: Unspecified

Notes

Save Cancel

HTCloud Identity

- TASK SETUP REQUIREMENTS**
1. Date, Time & Hours
 2. Person that the task is being completed for
 3. People Involved
 4. Category (what type of task)
 5. Quick detailed note about Task (Max 200 characters)
 6. If wanting to type or copy & paste a longer document, add a note (Max 10,000 characters)
 7. Send Reminder Notice (Optional)
 8. **SAVE**

Setup an Appointment (Support Demo)

Reminder: Notices Status: Active

Date/Time: Dec 06, 2016 08:00 AM 1.00

Person: Albright, Mary

Address: 3684 Fairmount Ave San Diego

Involved: Pat

Category: Unspecified

Notes

Save Cancel

HTCloud Identity

- APPOINTMENT SETUP REQUIREMENTS**
1. Date, Time & Hours
 2. Person that the appointment is being completed for
 3. People Involved
 4. Category (what type of appointment)
 5. Quick detailed note about appointment (Max 200 characters)
 6. If wanting to type or copy & paste a longer document, add a note (Max 10,000 characters)
 7. Send Reminder Notice (Optional)
 8. **SAVE**

Refresher - Setting Up a Client Authorization (Mandatory)

Relationship Management → Client tab → Scheduling Setup → Authorization

<input type="checkbox"/>	Add	Call Type ↓	Rate Package	Start	End	Max Hours	Per	Bill Rate
<input type="checkbox"/>		Service Place Holder		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>		PCA Hourly		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>		Homemaker Hourly		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>		CG 24 HR Live In - Breaks		Nov 22, 2016	Nov 22, 2026			
<input type="checkbox"/>		Caregiver 24 Hr Live In		Nov 22, 2016	Nov 22, 2026			

WHAT'S NEEDED IN THE CLIENT'S AUTHORIZATION?

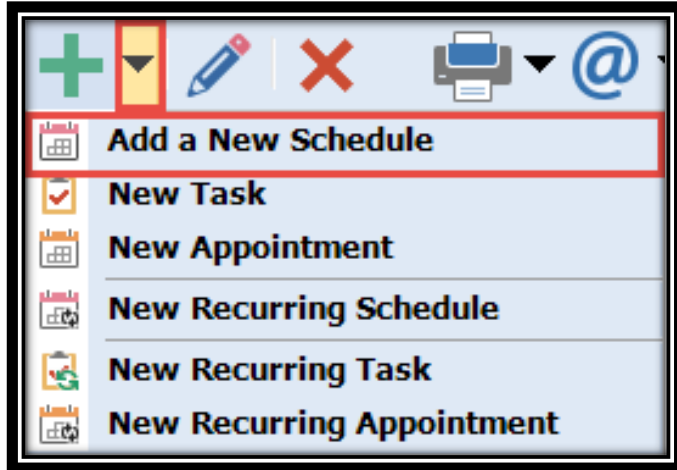
1. Primary Payer (who is paying the bill – **Client, Emergency Contact, Individual or 3rd Party Payer?**)
2. Check off what service(s) [Call Type(s)] are being provided
3. Select Rate Package (i.e. Hourly, 24 Hr Live In, Per Visit, etc.)
4. Select authorization Start dates (First day of services)
5. Enter in Bill Rate for that service

Click **SAVE**

How to Create a Schedule

You can add a schedule in two ways: **From the Toolbar** OR **On the Calendar**

From the Toolbar



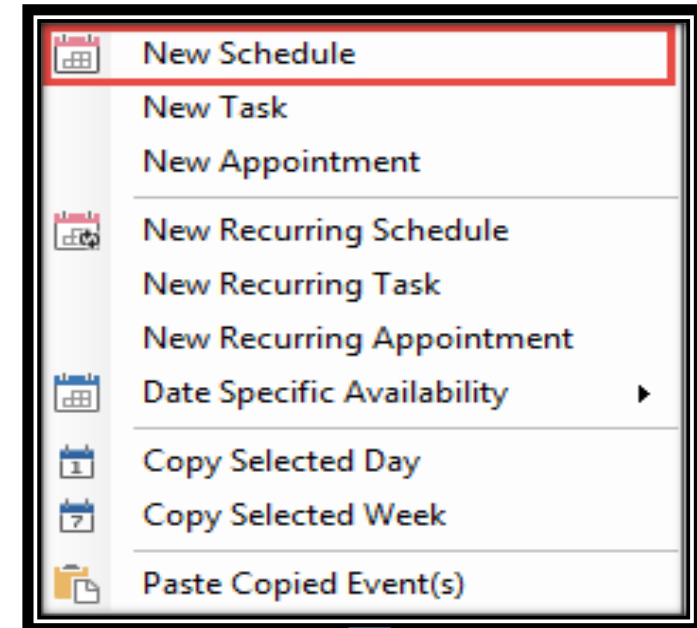
Left Click on the day you want to create a schedule so it's highlighted.

Click on the drop down arrow beside the '+' symbol in the tool bar to generate a list.

Click on **New Schedule**

OR

On the Calendar



Right Click on the day you wish to create a schedule. You will be presented with this drop down list of options.

Click on **New Schedule**

How to Create a Schedule (Continued)

The screenshot shows a software window titled "Add/Edit a Schedule (Support Demo)". The interface includes a top navigation bar with a menu icon, a status bar with "Documented Event", "Attach", "View", and "Status: Active". The main form contains several fields: "Scheduled on:" with date and time pickers (1.00 hours), "Client:" (Balsler, Leigh D), "Address:" (8504 El Paseo Grande San Diego), "Caregiver:", "Authorization:", "Instructions:", and "Hour Code:" (Both Payroll and Billing). Below this is a section for "After Schedule Completed" with "Actual Time:" pickers. A "Billing and Payroll Information" section is partially visible. On the right, a "Please Review" panel shows error messages: "No Caregiver Selected" and "No Authorization Selected". At the bottom, there are "Save" and "Cancel" buttons, with a large number "6" overlaid on the "Save" button.

REQUIREMENTS FOR CREATING A NEW SCHEDULE

1. Client
2. Caregiver
3. Authorization
4. Start Time
5. Hours (Length of Schedule)
6. **SAVE**

Upon saving the schedule, the event will be generated on both the Client's and Caregiver's calendars

How to Edit A Schedule

You can edit a schedule in two ways: **From the Toolbar** OR **On the Calendar**

From the Toolbar

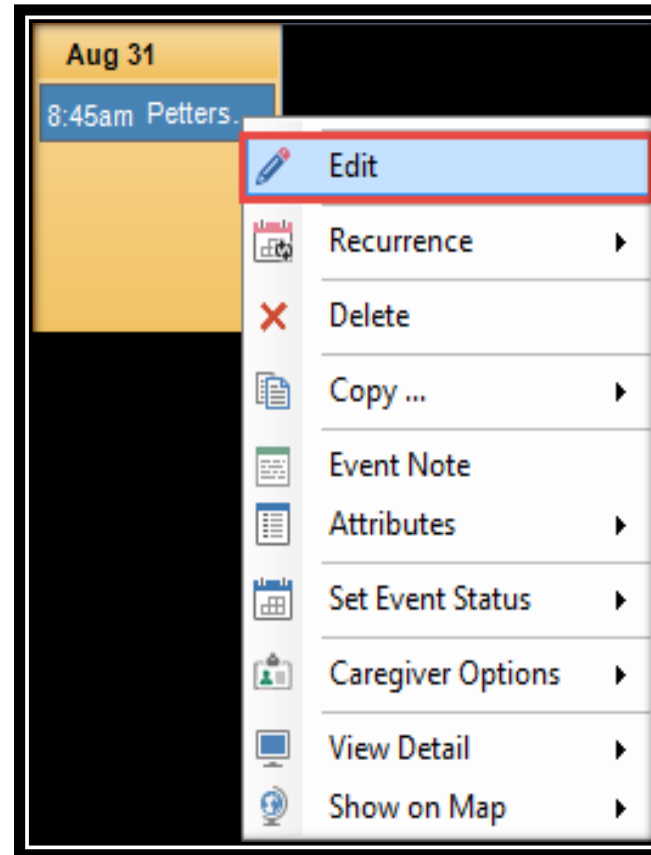


On the Calendar, click on the Schedule you wish to change and click on the EDIT (pencil icon) button.

This will open up the Add/Edit Schedule screen. Make your changes and click **SAVE**. Schedule is updated.

OR

On the Calendar



On the Calendar, right click on the Schedule you wish to change and click on the EDIT (pencil icon) button.

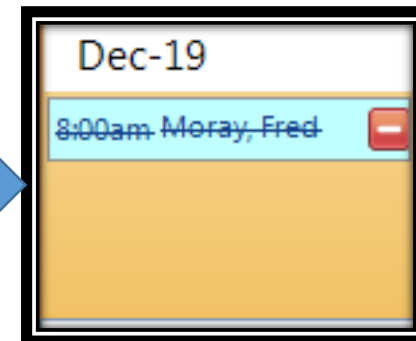
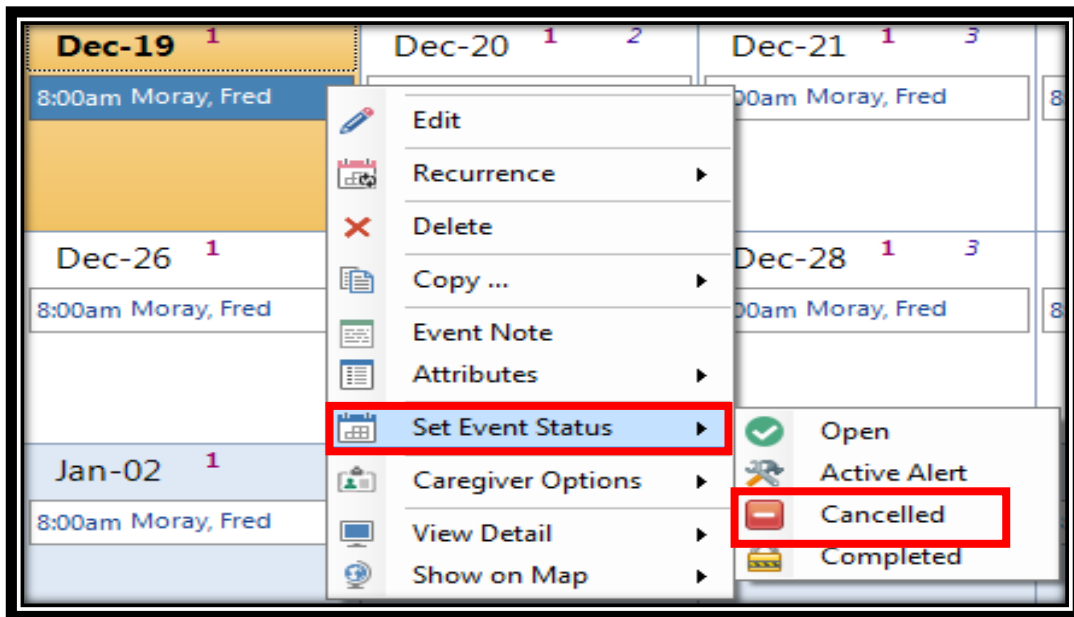
This will open up the Add/Edit Schedule screen. Make your changes and click **SAVE**. Schedule is updated.

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.

HOW TO CANCEL A SCHEDULE

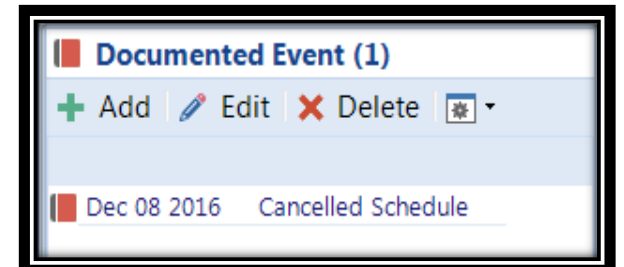
Go to the Schedule you wish to cancel and Right Click on it. You will be presented with a drop down of options. Click on **Set Event Status** and select **Cancel**.



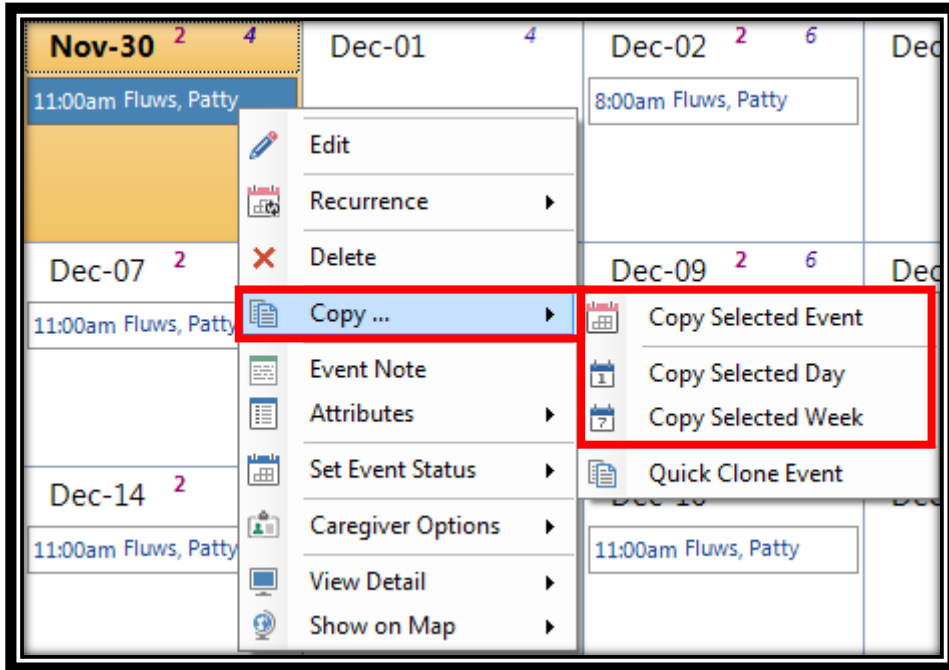
Example of what a cancelled schedule will look like on your calendar

BEST PRACTICE

If a schedule is cancelled, it is recommended to create a **Documented Event** to indicate who was involved, what happened, when it happened, where it happened and why it happened. This can be done on the Right Detail Panel.



Copy & Paste a Schedule

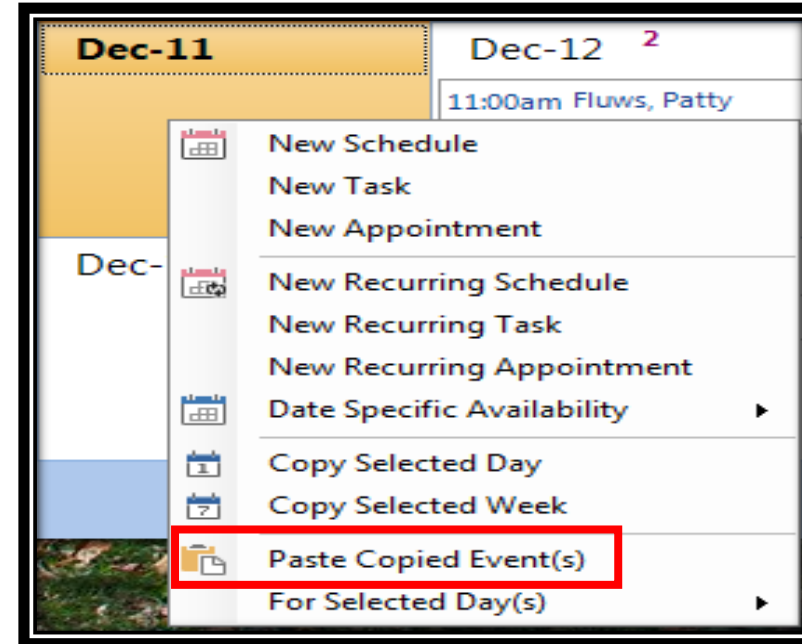


TO COPY A SCHEDULE

Right Click on the Schedule you would like to copy.

Left Click on **Copy**

Left Click on **Copy Selected Event**, **Copy Selected Day** (copies all schedules on that day), or **Copy Selected Week** (copies all schedules for the week you're highlighted on).



TO PASTE A SCHEDULE

After copying the desired schedule(s), Right Click on the day (or one day during that week if copying a whole weeks worth of schedules) and select **Paste Copied Event(s)**.

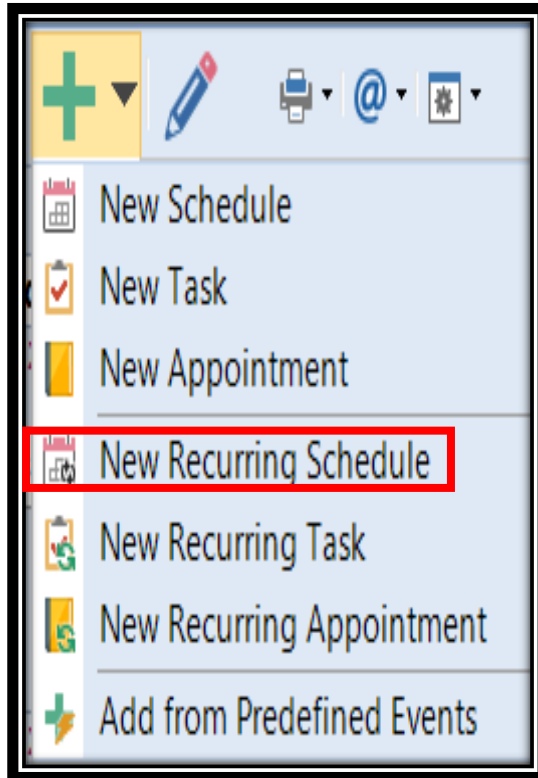
QUICK TIP

A quick method to copy an event is to click on the schedule you wish to copy and click **Ctrl + C** on your keyboard. Then, select the day you wish to paste it on and click **Ctrl + V**.

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 Option



On the Calendar, highlight the person you want to create a schedule for.

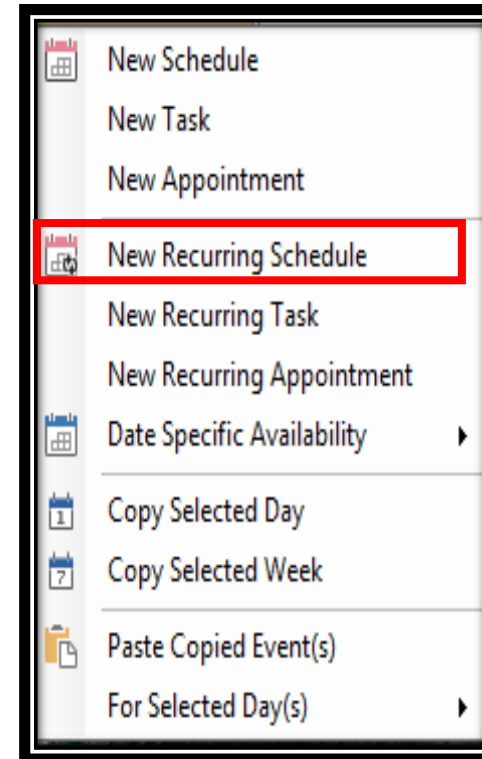
Left Click on the first date in which you would like the recurrence to begin.

Left Click on the Add (green plus symbol) above the calendar.

Left Click on **New Recurring Schedule**.

OR

Right Click Option



On the Calendar, 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.

Left Click on **New Recurring Schedule**.

How to Create a Recurring Schedule (Continued)

Add/Edit a Recurring Schedule (Support Demo)

Recurrence

Sunday Wednesday Saturday Every 1 Week 5

Monday Thursday 4

Tuesday Friday

Create Individual Weekly Recurrence for

Documented Event Attach View Status: Active

Scheduled on: Dec 11, 2016 08:00 AM 1.00

Client: Albright, Mary

2 Address: 3684 Fairmount Ave San Diego

Caregiver:

3 Authorization: Albright, Mary - PCA Hourly

Instructions:

Hour Code: Both Payroll and Billing

- After Schedule Completed -

Actual Time: Dec 11, 2016 08:00 AM 0.00

Billing and Payroll Information

Please Review

Display Item

Error

Caregiver

No Caregiver Selected

6 Save Cancel

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. Every 1 Week, 2 Weeks, 3 Weeks or 4 Weeks
6. Click **SAVE**

You will see a pop up asking for you to check for errors (**see below**). Click **YES** each time this pop up shows. It's checking for any conflicting schedules week by week, recurrence by recurrence.

Question

? Question

Check for errors over the next 2 recurrences?

Dec-20

Yes No

How to Edit a Recurring Schedule

The screenshot shows a calendar grid with dates Dec-12, Dec-13, Dec-14, and Dec-15. An event titled '8:00am Durco, Shannon' is scheduled for Dec-12. A context menu is open over this event, listing various actions. The 'Recurrence' option is highlighted in red, and its sub-menu item 'Edit the Recurrence' is also highlighted in red. A blue arrow points from the 'Edit the Recurrence' option towards the right-hand text box.

TO EDIT A RECURRING SCHEDULE

Right Click on the first day of the recurring schedule in which you need to adjust (i.e. start or end time changes or Caregiver being scheduled is changing), Click on Recurrence and Click on Edit Recurrence.

Make the necessary changes and **SAVE**. You will receive a pop up question (**see below**). The date you see in the pop up will be the date the change goes into effect. Click **YES** to begin the process of checking for any errors or conflicts that may occur. All schedules from that day forward will update to the new information.

The dialog box is titled 'Question' and contains the following text: 'Reset recurrence start date to Dec 26, 2016 before regenerating occurrences? (Non-isolated occurrences on or after this date will be replaced. No new occurrences will be created before this date.)'. At the bottom right, there are two buttons: 'Yes' with a green checkmark icon and 'No' with a red 'X' icon.