



HomeTrak

Your expert companions in home care software

HOMETRAK COMPANION

RELATIONSHIPS: HUMAN RESOURCES & CAREGIVERS

VERSION 6.3

This training guide is going to address the functionality and purpose of the Human Resources and Caregiver Modules

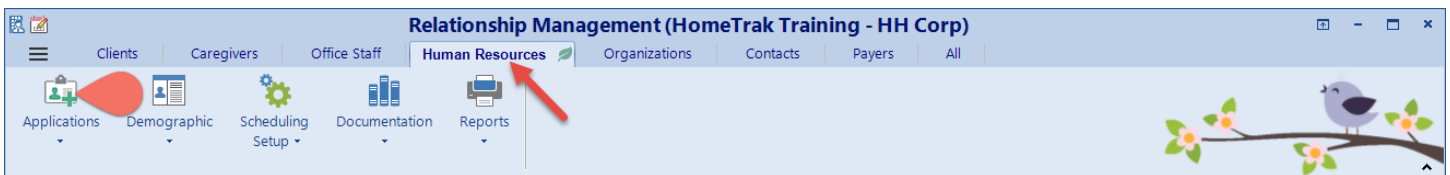
Let's get started with the Human Resources Module and outline the uniqueness of this module and what sets it aside from the Caregivers Module.

1. Web Applications come in to this module and can be viewed and processed. (for information on how to configure your web applications, please go to [Client and Caregiver Applications](#))
2. If you wish to record Employee Interviews, this can be facilitated using the Interview feature (more on that further into the document)
3. We have interfaced with Sterling Back Check. This is a company who conducts all of your background checks and employee screening. Once you have an account with Sterling the interface can be turned on and utilized. Please go to [SterlingBackcheck Integration](#).
4. Employee Incident Reports (Verbal and Written) can be created and stored here.
5. Payroll rates/options can be created, stored and managed exclusively in this module vs. the Caregiver Module.

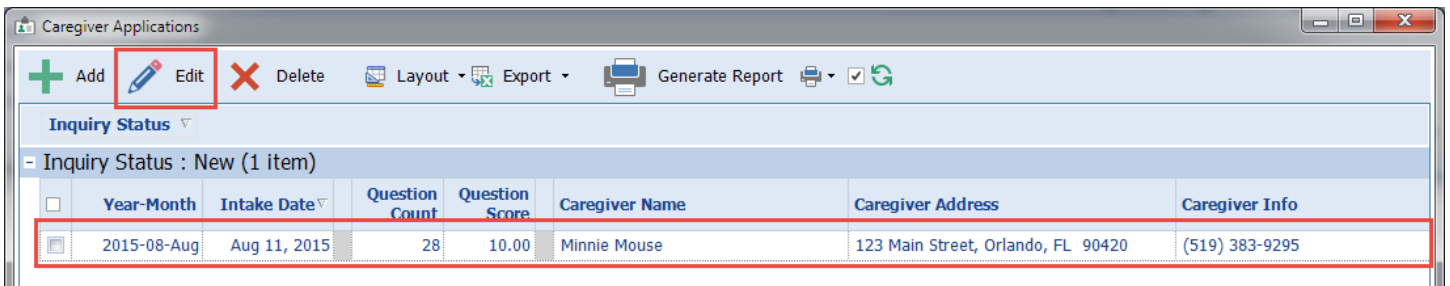
Let's Get Started:

How to use the Caregiver Application screen.

Click on Applications menu then click *Caregiver Application* to review the submitted applications.



Next, click on the person you want to review by clicking the line item in the list, then click the **Edit** button on the toolbar. In this example, I clicked on *Minnie Mouse's* line to review.

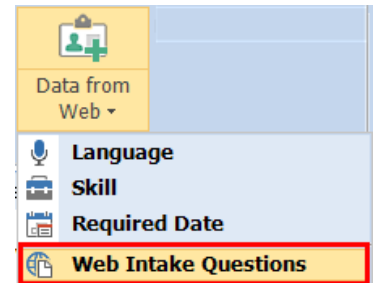


The *Web Intake and Office Inquiry Form* screen appears and displays the demographic information.

The screenshot shows the 'Web Intake and Office Inquiry Form' interface. At the top, there are navigation buttons: 'Home', 'Generate Report', and 'Options'. A 'Data from Web' button is highlighted with a red box. Below this is the 'Demographics' section, which includes fields for 'Type' (Caregiver), 'Phone', 'Received' date (Aug 11, 2015), 'Category', 'Cell', 'Potential', 'Name' (Minnie Mouse), 'Email', 'Assessed', 'Active', 'Address' (123 Main Street, Orlando, Florida), 'City', 'State', 'Zip' (90420), 'District' (Not Valid), 'Note', 'Owning Office' (Moyras Test Office), 'Person Calling if Not Above Caregiver' (Category, Phone, Contact Name, Cell, Make Emergency Contact), and 'Referral' (Organization, Referrer, Category). At the bottom, there are 'Save' and 'Cancel' buttons.

You will want to review the caregiver's responses to the application questions.

To do so you will click on the **Data from Web** drop-down button then click the *Web Intake Questions* tool.

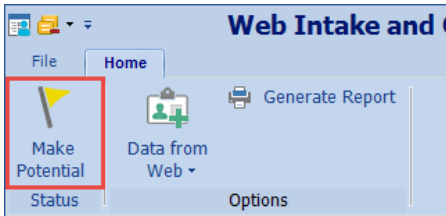


The *Web Intake Questions* screen opens and displays all the questions and how the caregiver responded to them on the caregiver application. Click the **OK** button when finished to close the screen.

The screenshot shows the 'Web Intake Questions' application. It features a table with columns for 'Inquiry Questions', 'Response', and 'Date'. The table is divided into sections: 'General Questions' and 'High School Education'. The 'General Questions' section includes questions about position, wage, availability, and citizenship. The 'High School Education' section includes questions about name, address, and diploma. At the bottom, there is an 'OK' button highlighted with a green checkmark.

| Inquiry Questions | Response | Date |
|---|----------------|---------------------|
| General Questions | | |
| <input type="checkbox"/> Which Position are you applying for: | HomeMaker | Aug 11, 2015 09:... |
| <input type="checkbox"/> Lowest Acceptable Wage Per Hour: | \$10.00 | Aug 11, 2015 09:... |
| <input type="checkbox"/> Lowest Acceptable Wage for a 24 Hour Live-in: | \$0.00 | Aug 11, 2015 09:... |
| <input type="checkbox"/> Date you can start: | 2015-08-11 | Aug 11, 2015 09:... |
| <input checked="" type="radio"/> How did you hear about us? | Newspaper | Aug 11, 2015 09:... |
| <input type="checkbox"/> Are you a US citizen or legally eligible to hold employment in USA? | Yes | Aug 11, 2015 09:... |
| <input type="checkbox"/> Are you at least 18 years old? | Yes | Aug 11, 2015 09:... |
| <input type="checkbox"/> If NO, how many months before you turn 18? | 0 | Aug 11, 2015 09:... |
| <input type="checkbox"/> Are you related to anyone employed by our company? | [Not Answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> If yes, name of the person, relationship and location employed: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> Have you ever worked for our company? | [Not Answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, give date: | [Not Answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, enter location: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, enter Supervisor's Name: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> Do you have any disabilities that may limit your ability to perform the work | No | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, please explain: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, what can be done to accomodate your limitation? | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> Have you ever been convicted (found guilty) of attempting or committing a | No | Aug 11, 2015 09:... |
| <input type="checkbox"/> If YES, give date: | [Not Answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> IF YES, for what? | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> When are you available to work? | Full Time | Aug 11, 2015 09:... |
| High School Education | | |
| <input type="checkbox"/> Name: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> Address: | [Not answered] | Aug 11, 2015 09:... |
| <input type="checkbox"/> Received Diploma? | [Not Answered] | Aug 11, 2015 09:... |

After reviewing the caregiver's application, you have the option to make the caregiver potential. Click *Make Potential* in the top left-hand corner of the ribbon.

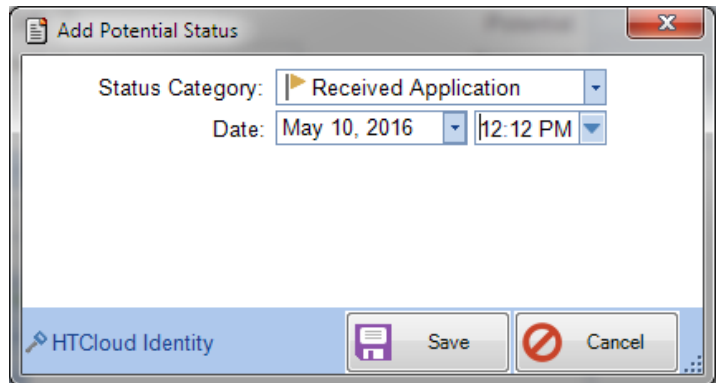


The *Add Potential Status* screen opens. You can click the **Status Category** drop-down list and change the selection to *Received Application* and then change the date and time, if needed. Click the **Save** button.

Next, you will see two question prompts. You can say no to these questions and add the referral source later, if there is one.

- Add a Referral Source?
- Add a Task?

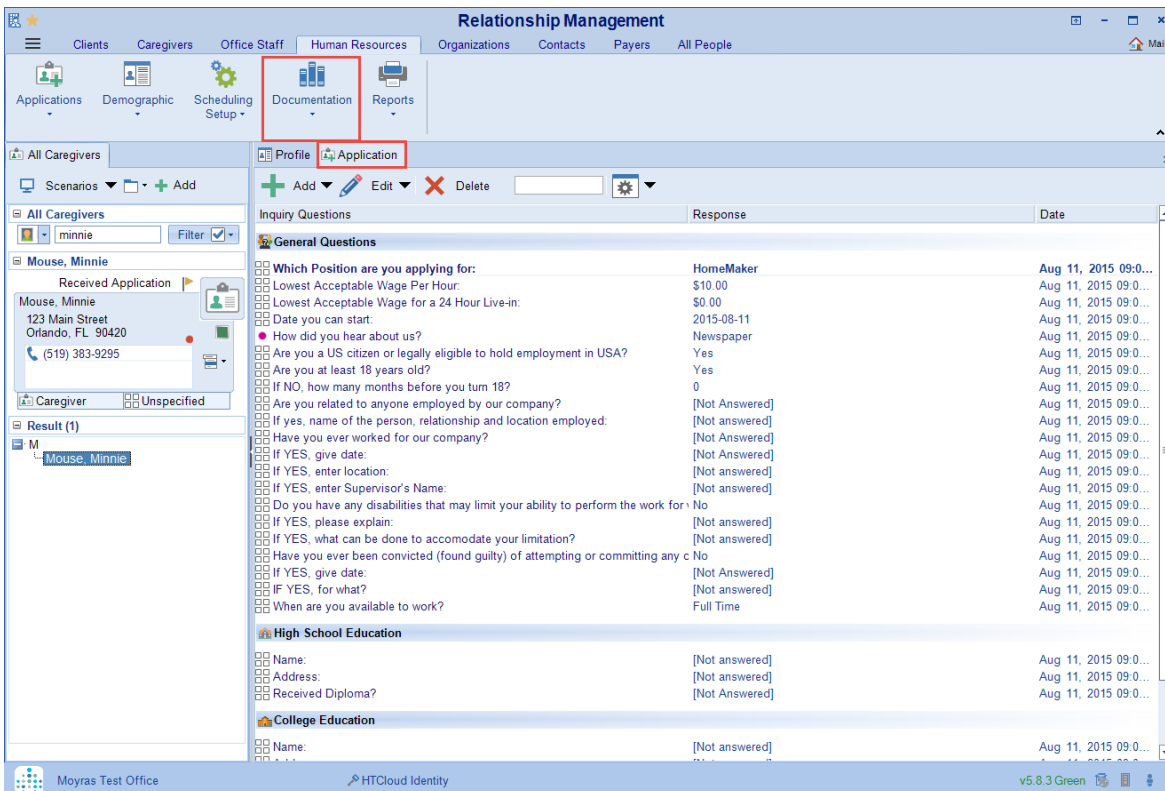
Now the Potential Caregiver is ready to move to the next stage of being assessed, which is the **interview**.



By the way: If you do not use the *Web Application* form to enter potential caregivers, you can add them directly into the *Human Resource* or the [Caregiver Module](#) using the same manual method to add a new Caregiver. Go to **page 10**.

Application

You will want to review the caregiver's application before you interview them. To do this click the Documentation tab then click **Application** from the menu.



Let's discuss moving this caregiver from received application to the interview stage through to hire date.

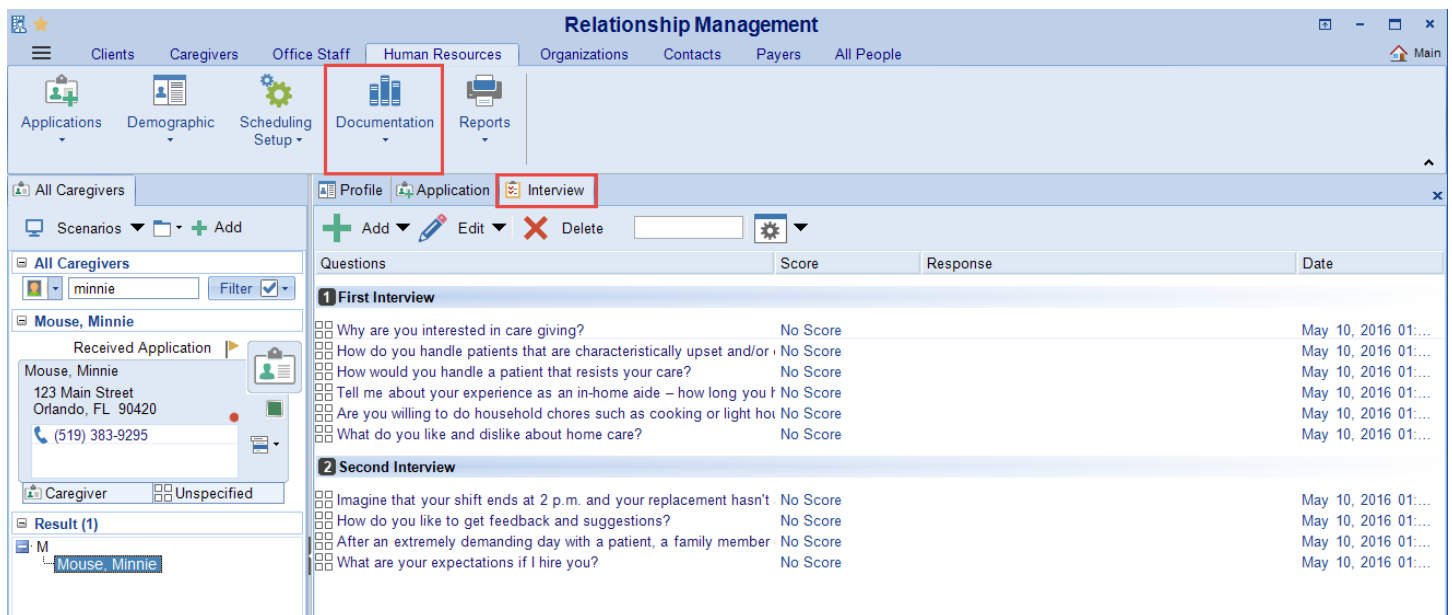
As you know, in HomeTrak, we use the status feature to track the progression of all entities through the system, thus allowing for excellent record keeping for historical and reporting purposes. Tracking of Caregivers is no different. ([Using Statuses](#))

Once you have decided to interview the Caregiver you may elect to use our Interview Feature. If you do, there are a few things you need to consider. (If you are not using the interview feature, then skip this section and proceed to the next section of the document)

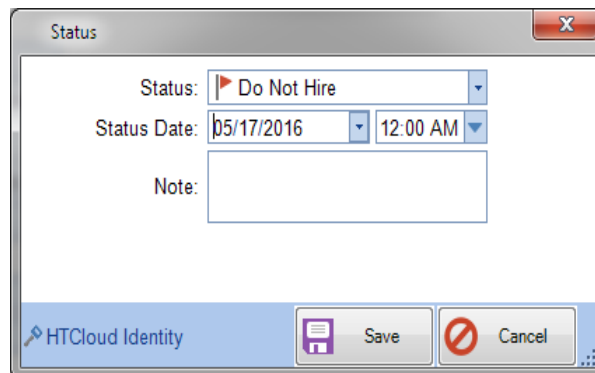
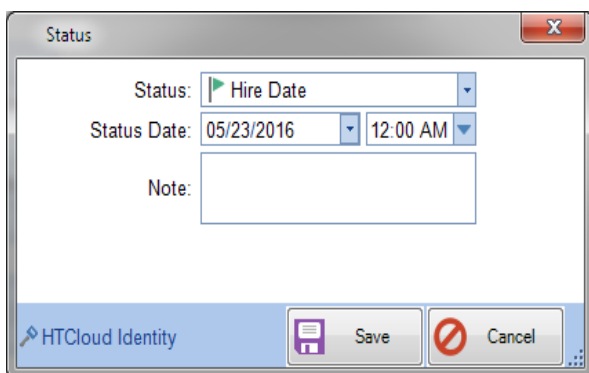
Pre-requisite for using the Interview Feature:

Your questions need to be configured and created in the *User Defined > All Options > Interview Questions* ([How to Configure Interview Questions](#))

To use the Interview feature click the Documentation tab then click **Interview** from the menu. Next, click Add then Quick Add; choose a Topic then add the questions. You can score and add notes based on how the applicant answered the questions. Click Save when finished.



Once interview has been completed you have two options: **Hire** or **Do Not Hire**. It is up to you to choose the correct status.

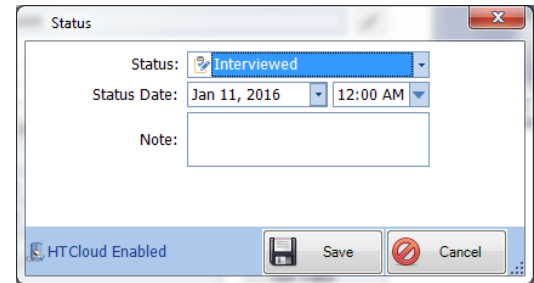


What information to capture when you are Assessing (Interviewing) your Caregiver

Demographic Menu:

1. Change their Status from Received Application 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.



Documentation Menu:

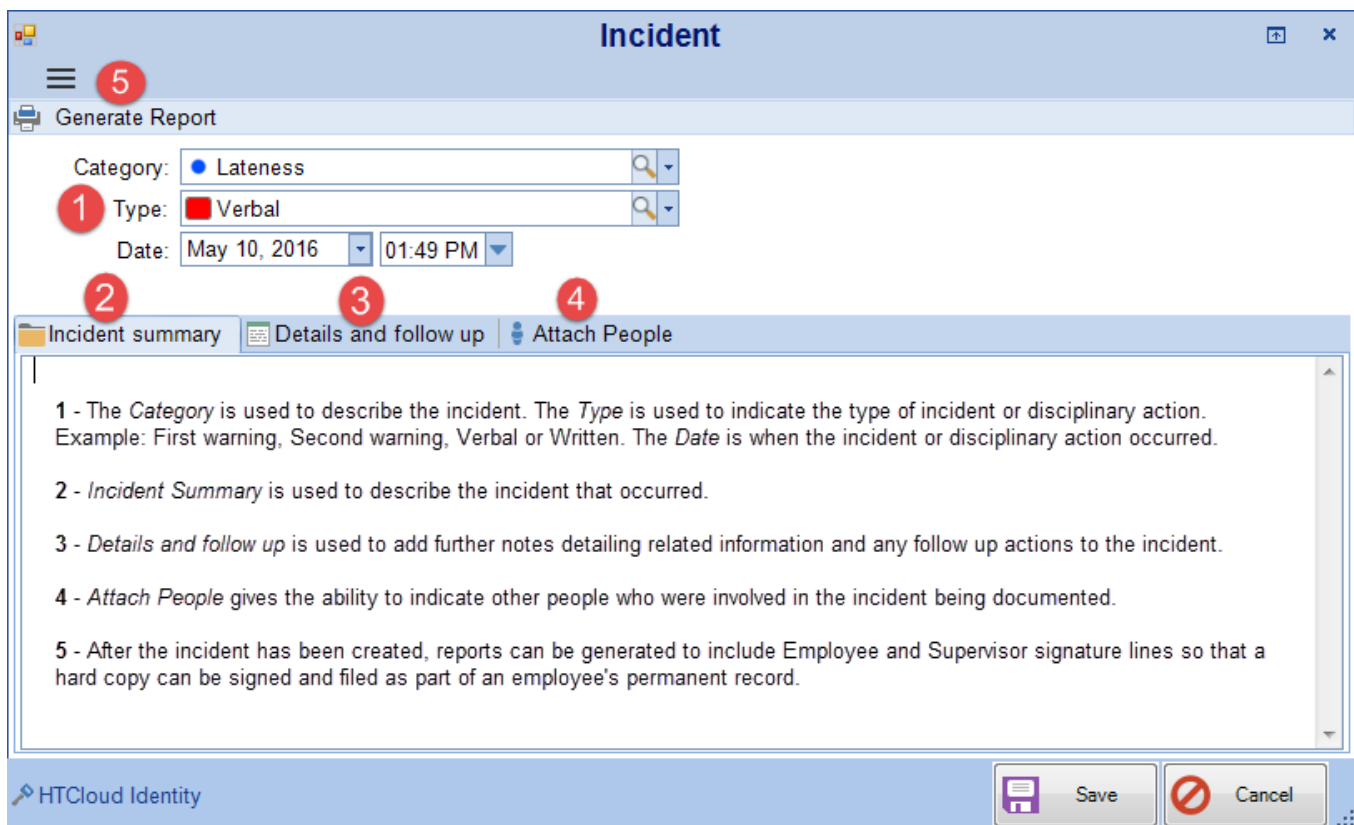
2. Background Checks

If you have an account established with Sterling Back Check this the area in the software where the Background checks are initiated, monitored and reviewed. [SterlingBackcheck Integration](#).

3. Incident Reports

[Incidents](#) may be used to track formal warnings or disciplinary actions taken with your employees. Incidents are similar to Documented Events, but due to the potentially sensitive nature of the contents, Incidents are only accessible within the Human Resources tab in the Relationships Management Module.

To view or add Incidents for your employees (Caregivers or Office Staff), open the Human Resources tab, select the appropriate person in the Find Area and click on the Incidents tool under the Documentation drop down menu on the ribbon. Then click Add on the toolbar to add a new Incident.



5

1

2

3

4

1 - The *Category* is used to describe the incident. The *Type* is used to indicate the type of incident or disciplinary action. Example: First warning, Second warning, Verbal or Written. The *Date* is when the incident or disciplinary action occurred.

2 - *Incident Summary* is used to describe the incident that occurred.

3 - *Details and follow up* is used to add further notes detailing related information and any follow up actions to the incident.

4 - *Attach People* gives the ability to indicate other people who were involved in the incident being documented.

5 - After the incident has been created, reports can be generated to include Employee and Supervisor signature lines so that a hard copy can be signed and filed as part of an employee's permanent record.

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. Keep in mind that another benefit of the Human Resources Module, is that you can also create Payroll Rates for your Office Staff allowing you to pull those records through to payroll as well.

Please note that all of the options available in the Demographics and Scheduling Set Up can be created and subsequently managed either in the Human Resources Module or the Caregivers Module. We suggest that you if you are using the Human Resources Module, then the initial set up of these features be completed in

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, numbered 1, 2, and 3. Each window has a title bar with a number and a subtitle indicating the configuration type. All windows share the same layout: 'Valid From' and 'To' date pickers (set to May 01, 2016 and May 10, 2026), a 'Rate Type' dropdown, a 'Call Type' dropdown, a 'Specific Person' search field, and a 'Rate' input field. At the bottom of each window are 'HTCloud Identity', 'Save', and 'Cancel' buttons.

- 1 Rate-Type Specific:** The 'Rate Type' dropdown is highlighted with a red box and set to 'Hourly'. 'Call Type' and 'Specific Person' are blank.
- 2 Call Type Specific:** The 'Call Type' dropdown is highlighted with a red box and set to 'PCA Hourly'. 'Rate Type' is 'Hourly' and 'Specific Person' is blank.
- 3 Client-Specific:** The 'Specific Person' search field is highlighted with a red box and contains 'Jackson, Bo'. 'Rate Type' is 'Hourly' and 'Call Type' is 'PCA Hourly'.

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](#))

Payroll Options

Secondary Addresses Individuals

Pay Hours At: Actual
Hours Ratio: Show Hour in Hour Format
Mileage Rate: .58
Travel Rate Per Hour: 7.5
Max Minutes of Travel: 0
Pay Holiday Rate:
Pay Overtime:
Actual > Sch, Pay Sch:
Actual < Sch, Pay Sch:
Send To Override:
Address Override:
Quickbook Class:
Pay Rounded Hours At: 15 minute interval. 8 Up.
Pay Stub Information:
Payroll Instructions:
Description Pay
Errand Miles
Expenses
Mileage
Per diem
Travel Time
HTCloud Identity Save Cancel

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

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

ⓘ 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.

Quick Add - Qualifications

| Add | Qualification | Rank | License # | Note |
|--------------------------|--------------------------|------|-----------|------|
| <input type="checkbox"/> | Registered Nurse | | | |
| <input type="checkbox"/> | Homemaker | | | |
| <input type="checkbox"/> | Personal Care Assistant | | | |
| <input type="checkbox"/> | Licensed Practical Nurse | | | |
| <input type="checkbox"/> | RNA | | | |
| <input type="checkbox"/> | Staffing | | | |
| <input type="checkbox"/> | Certified Nurse Aide | | | |
| <input type="checkbox"/> | Home Health Aide | | | |

HTCloud Enabled Save Cancel

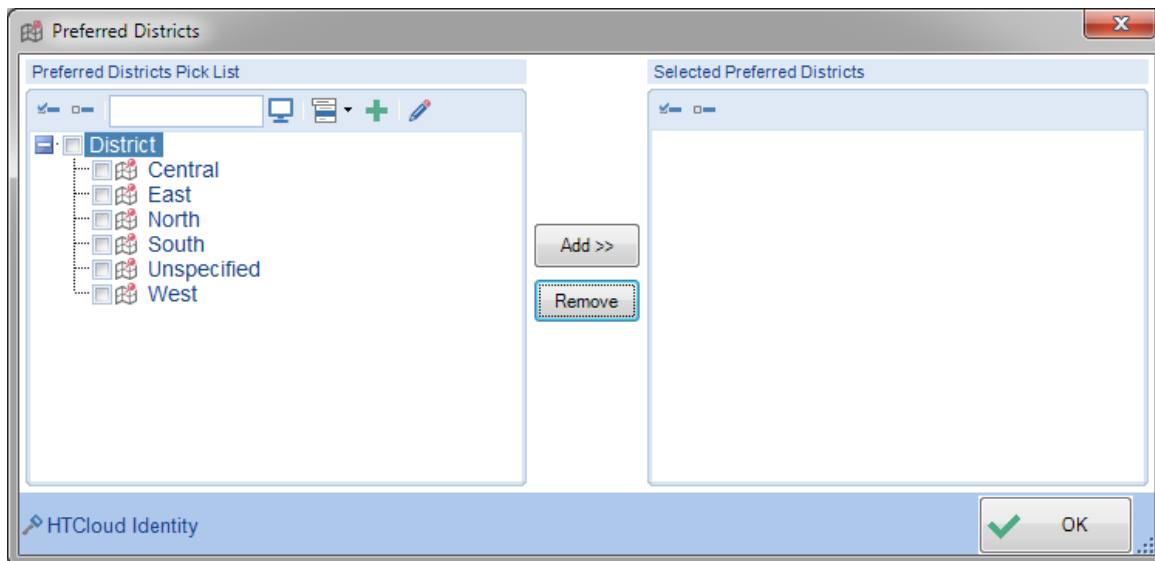
Preferred Districts (if you are using this feature).

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 Demographic menu, 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.



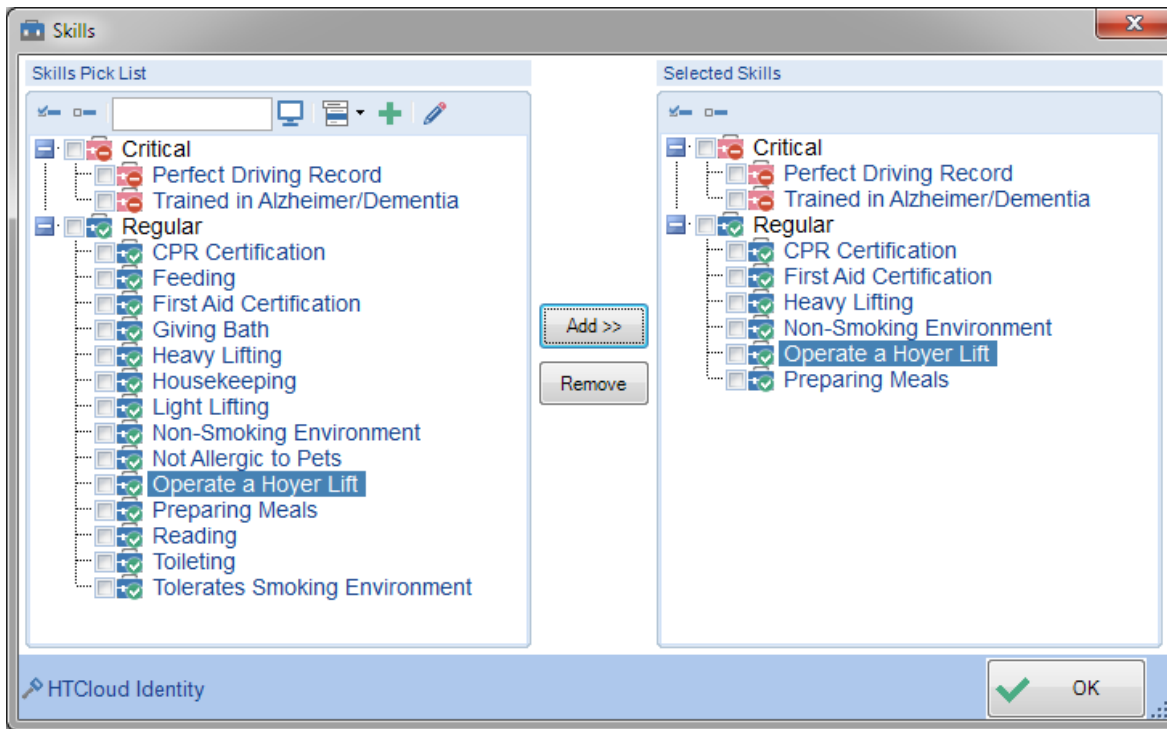
Skills (if you are using this feature).

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.

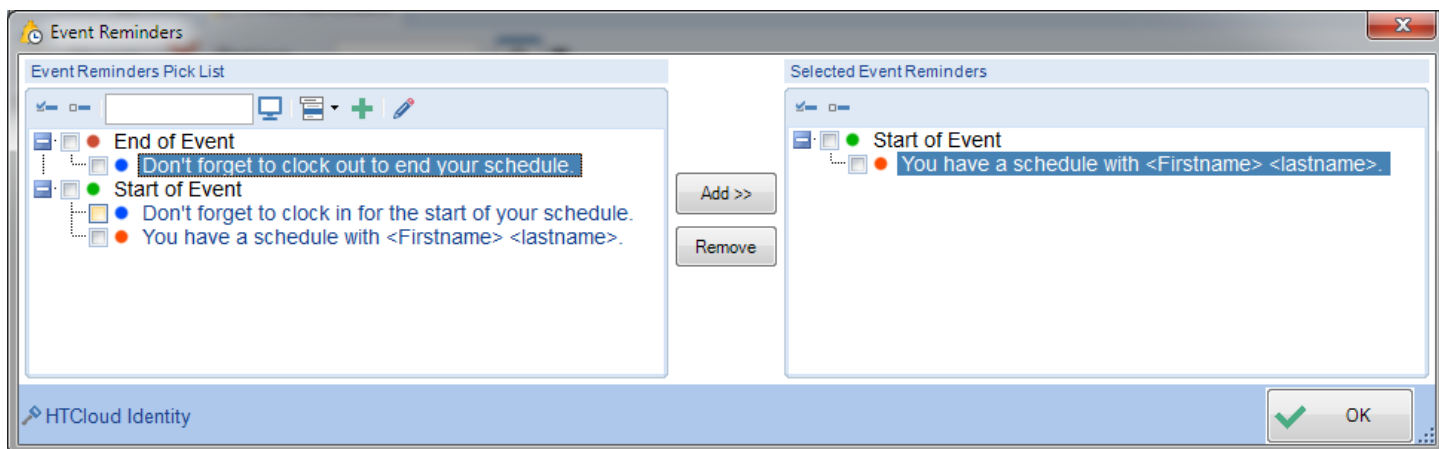
Excluding Certain Schedule Call Types from Alerts and Reminders

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.



Caregiver Module:

From the **Main Module**, click the **Relationships** icon, then click the [Caregiver](#) 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 *Quick Pick* feature gives you the option of matching caregivers and clients by the languages they speak.

If you are using QuickBooks 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.

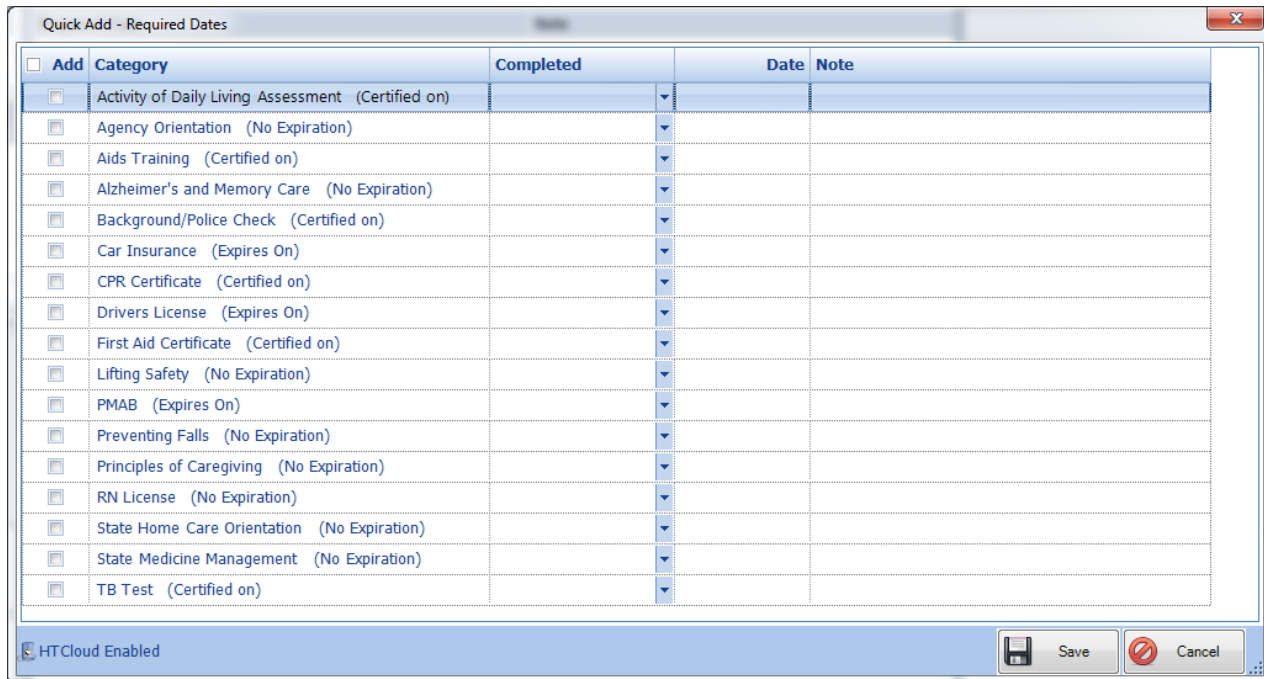
Add their Required Dates (if you are using this feature).

Using this feature allows you to keep track of and run reports on date sensitive requirements that are due to expire. 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.



The screenshot shows a software window titled "Quick Add - Required Dates". It contains a table with the following columns: "Add" (checkbox), "Category", "Completed" (checkbox), "Date", and "Note". The table lists 17 categories, each with a checkbox in the "Add" column and a dropdown arrow in the "Completed" column. The categories are:

| Add | Category | Completed | Date | Note |
|--------------------------|--|-----------|------|------|
| <input type="checkbox"/> | Activity of Daily Living Assessment (Certified on) | ▼ | | |
| <input type="checkbox"/> | Agency Orientation (No Expiration) | ▼ | | |
| <input type="checkbox"/> | Aids Training (Certified on) | ▼ | | |
| <input type="checkbox"/> | Alzheimer's and Memory Care (No Expiration) | ▼ | | |
| <input type="checkbox"/> | Background/Police Check (Certified on) | ▼ | | |
| <input type="checkbox"/> | Car Insurance (Expires On) | ▼ | | |
| <input type="checkbox"/> | CPR Certificate (Certified on) | ▼ | | |
| <input type="checkbox"/> | Drivers License (Expires On) | ▼ | | |
| <input type="checkbox"/> | First Aid Certificate (Certified on) | ▼ | | |
| <input type="checkbox"/> | Lifting Safety (No Expiration) | ▼ | | |
| <input type="checkbox"/> | PMAB (Expires On) | ▼ | | |
| <input type="checkbox"/> | Preventing Falls (No Expiration) | ▼ | | |
| <input type="checkbox"/> | Principles of Caregiving (No Expiration) | ▼ | | |
| <input type="checkbox"/> | RN License (No Expiration) | ▼ | | |
| <input type="checkbox"/> | State Home Care Orientation (No Expiration) | ▼ | | |
| <input type="checkbox"/> | State Medicine Management (No Expiration) | ▼ | | |
| <input type="checkbox"/> | TB Test (Certified on) | ▼ | | |

At the bottom of the window, there is a status bar with "HTCloud Enabled" on the left and "Save" and "Cancel" buttons on the right.