HOMETRAK COMPANION

RELATIONSHIPS: SCHEDULING WITH CALENDARS

VERSION 6.3

The following is our recommended best practices for creating schedules within HomeTrak Companion.

First, let's do a quick review of the purpose of an Authorization (Contract).

An **Authorization** is mandatory for a client and must be in place before any schedules can be created. The authorization states the following:

- Start and End Date
- Who is the Primary Payer
- What is the Rate Package (Hourly, Live-in or Per Visit)
- What Service is being provided (Call Type)

Client/Caregiver Calendar Scenarios

The **Scenarios**, **Group By** and **Filter** buttons are used to help you refine the client and caregiver data viewed in the **Result** panel. These tools can be used alone or together in any combination to achieve the results you're looking for. All of these tools are optional and are specific to each user signed into the software.

You can look at Scenarios for This Week and Next, or any future or past time frame. Explore the different options in the scenarios list:

Client Scenarios

- **No schedules (This Week and Next):**
- **Has Alert Status (This Week and Next):**
  There are two ways an Alert is produced.
    - 1) manually attach an alert to a schedule, or
    - 2) The software will automatically assign an alert if there is something about the schedule that requires your attention, i.e. missing a Caregiver, Schedule conflict.
- **Under/Over Authorized Hours**
- **New Clients:** This scenario is an excellent quality control feature. It allows you to focus on just your new clients to make sure everything is set up correctly and all schedules are in place. Think of it as a way of double checking.
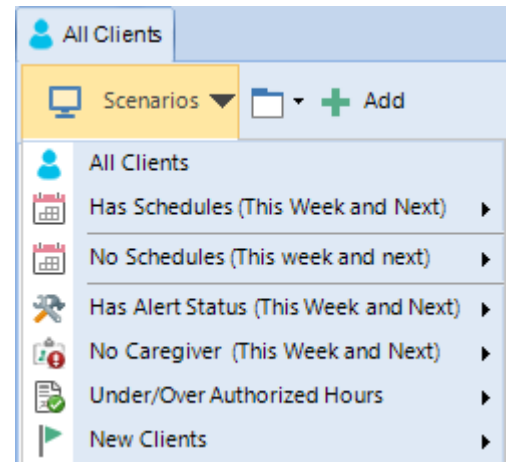
Caregiver Scenarios helps you manage their schedules to avoid conflicts, overlaps, exceeding their maximum hours per week, or if they are going into overtime or not.

- **Overlap Schedules (This Week and Next)**

- **Over Maximum Hours per Week (This Week and Next)**

- **Will have overtime when calculating payroll**
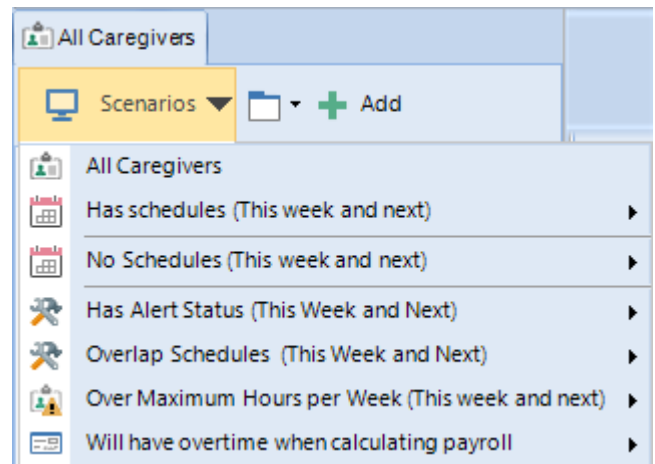
Manage Items Menu – known as the **GROUP BY**

The **Group By** allows you to choose how you want to arrange your clients and caregivers in the **Result** panel.
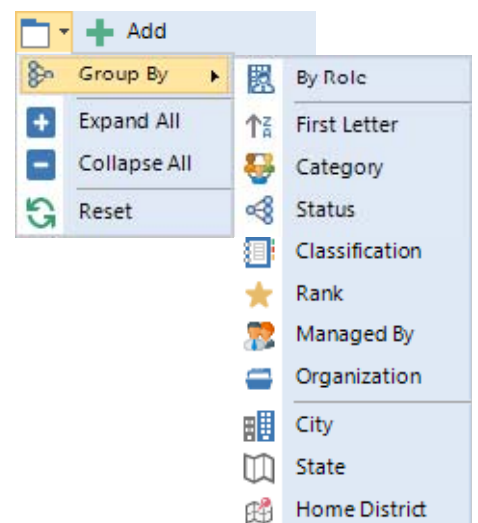
Filter By Name – known as the **FIND BY**

Filtering is a tool that you will use constantly within HomeTrak Companion when locating a person(s) and their information. It allows you to narrow down the result information based on the filter criteria you select and displays only the people that fit the selected filter criteria. Filtering is useful when you want to view information only for people whose information fits specific criteria.

Filtering tools are accessed in the upper portion of the Find Area Panel on the left of a screen that displays people information.

When filtering using the Filter Box, select the type of Information being searched using the drop down menu. Then enter the information you wish to filter by. If the system finds a record that matches this input, then the name(s) of the person(s) that have that information will be displayed in the Result section of the find area.
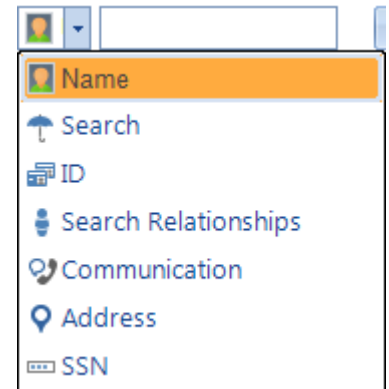
Advanced Filter – known as the **FILTER BY**

Each advanced filter element is able to narrow your search according to different criteria. Click a filter option/element in the column, such as Status or Rank, to view the related options that are available to select.

For example in this image, the Status filter element and the *Active, Assessed* and *Potential* status options are selected. If we were to deselect the Status filter element, the system would not filter by status, even if *Active, Assessed* and *Potential* were still selected. All statuses will be displayed. If you select a filter element and would like to save that as the default for a particular module, click the Save button in the upper right of the filter window. **Note:** Advanced Filters in each module may not contain all filter elements.
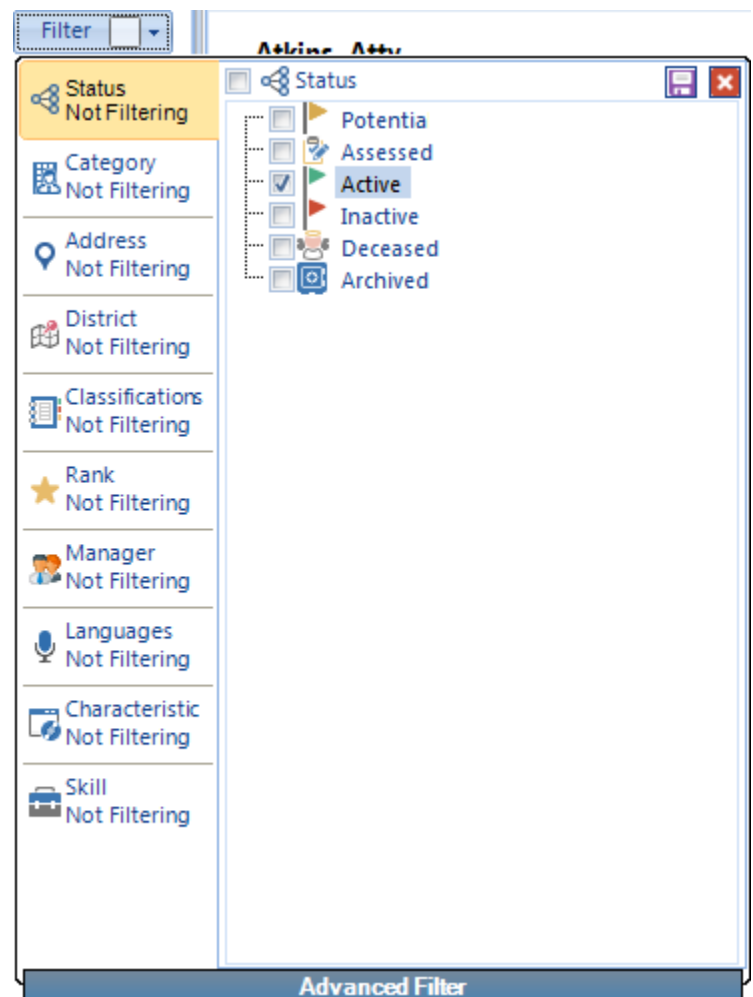
**Detail Panel** (right-hand side of screen)

When you click on a **Schedule,** the detail panel on the right-hand side of the screen will show the schedule information such as Date, Start Time, How many Hours, the Client's name and address, the Call Type (type of service) and the Caregiver's Name.

Weekly Totals for the Client and Caregiver are also displayed.

- Example: **Client = 10 weekly hours** and **Caregiver = 10 weekly hours.**
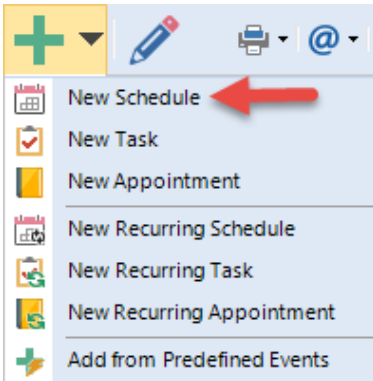
Tools at the bottom of the Detail Panel

|	
👫- Pending Caregivers	Displays all pending caregivers for selected schedule.
📧- Notes	Displays all attached notes.
📋- Attributes	Displays all attached attributes.
💱- Extra Charges	Displays all attached Extra Charges.
▌- Documented Events	Displays all attached Documented Events.
🗒- Care Plan Duties	Tasks to perform on the schedule.
🗓- Schedule	Displays information on the selected schedule.
⚠- Warnings and Errors	Important information regarding the selected schedule.
🏷- Caregiver	Displays information on the attached caregiver.
🖼- Primary Person	Displays information on the attached client for a schedule, or the primary person for the other event types.
📄- Authorizations	Displays information on the attached authorization.
🔄- Recurrence	Displays the creation date and pattern of the recurrence.
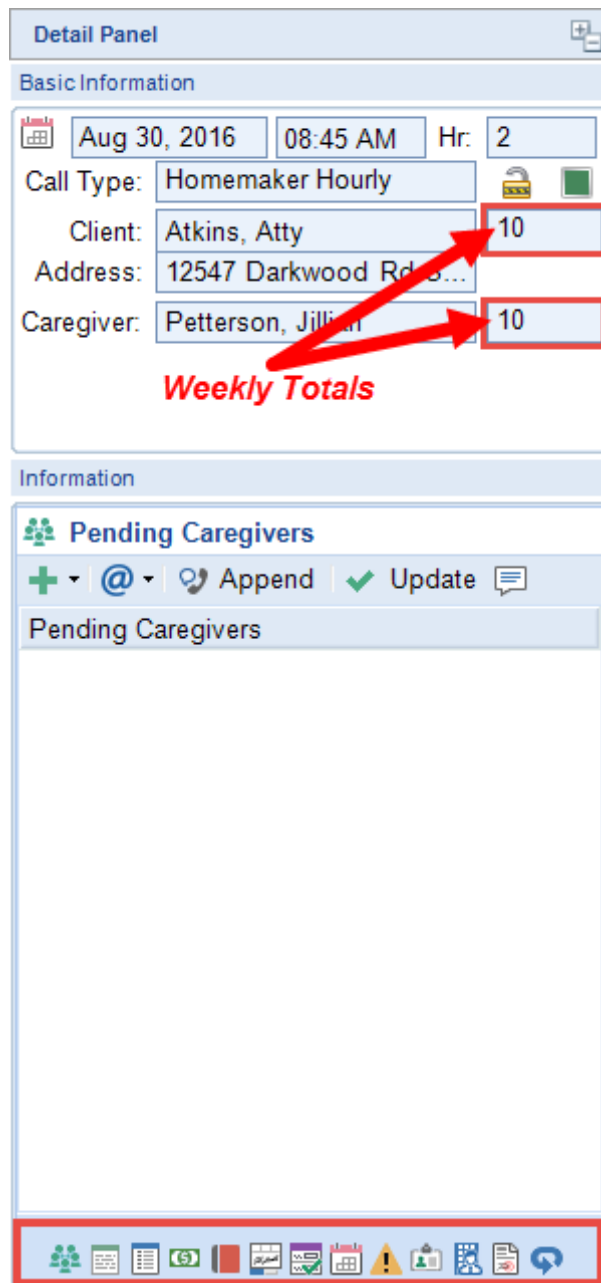
How to Add an Individual Schedule

You can *Add* a schedule in two ways: from the toolbar or on the calendar itself. On the calendar, right-click on the date you want to add the new schedule and click *New Schedule* from the menu.
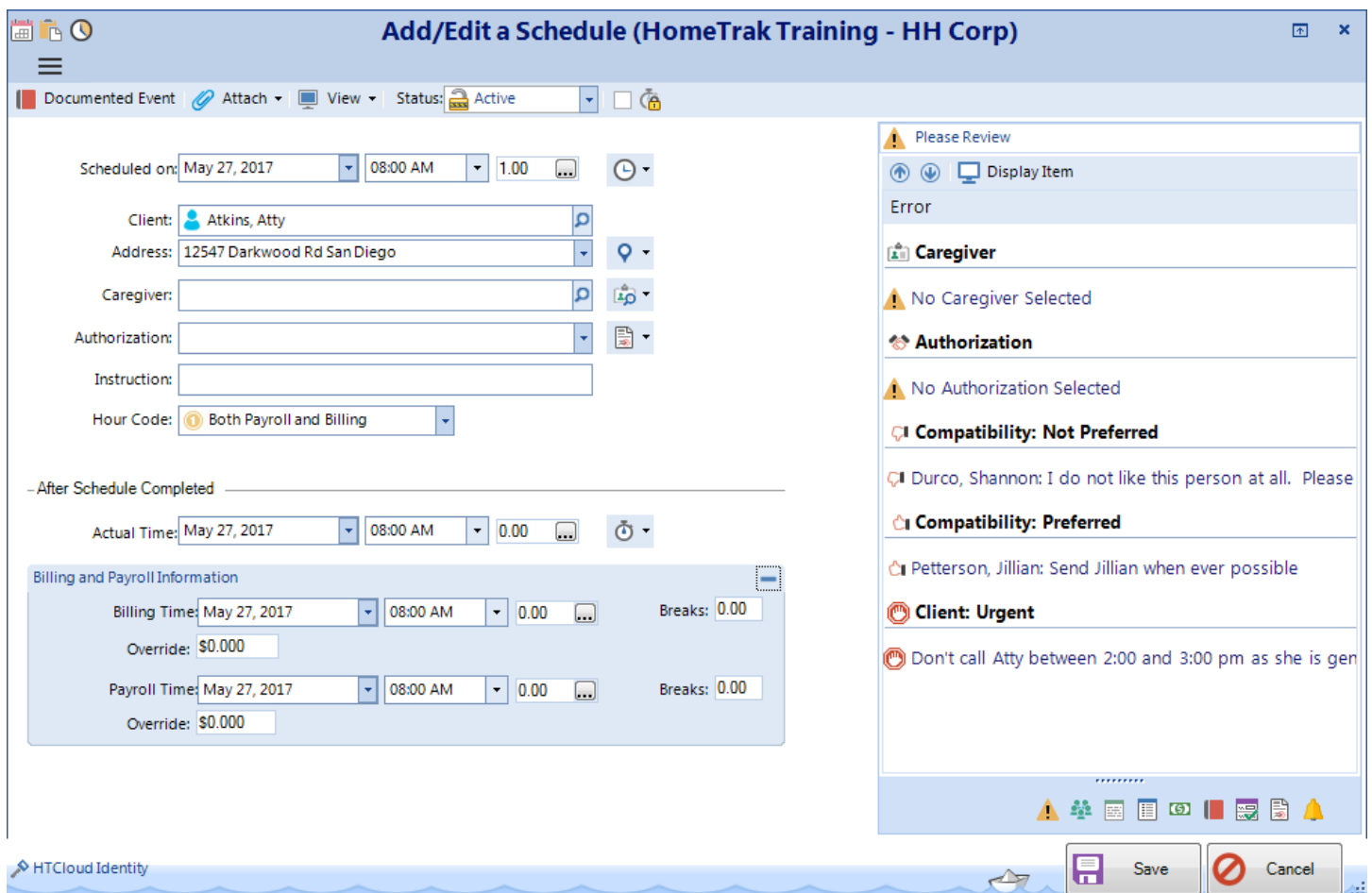
Click Add from Toolbar   -OR-   *Right-Click on Calendar Day*
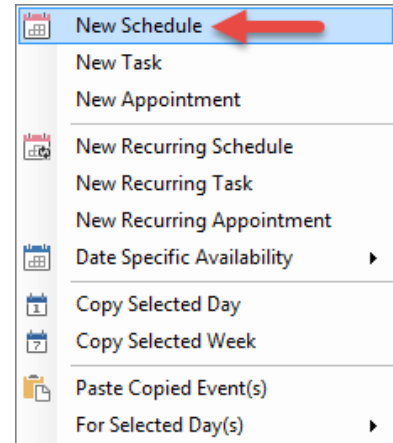
To setup a Schedule you will need to fill in the following fields:
Scheduled Date, Start Time, Hours, Caregiver and Authorization.

How to Edit a Individual Schedule

You can **Edit** a schedule in two ways: from the toolbar or on the calendar itself. On the calendar, right-click on the schedule you want to edit and click **Edit** from the menu.

Click Edit (pencil icon) from Toolbar   -OR-   *Right-Click on Schedule on Calendar, choose Edit*
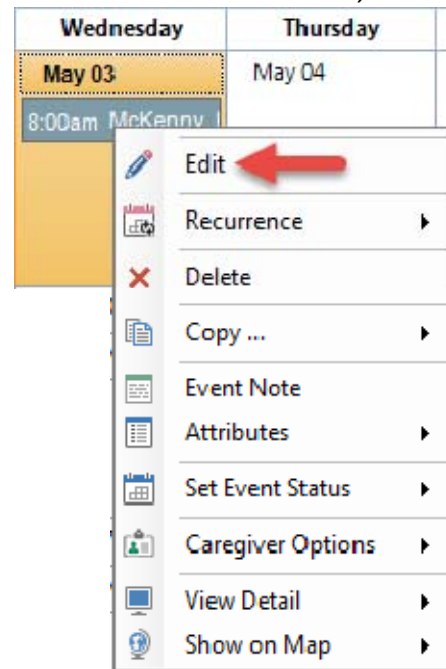
Make changes to any fields and save.

How to Delete an Individual Schedule

You can **Delete** a schedule from the calendar. Right-click on the schedule and then click Delete on the context menu.

Right-Click on Schedule on Calendar, choose Delete
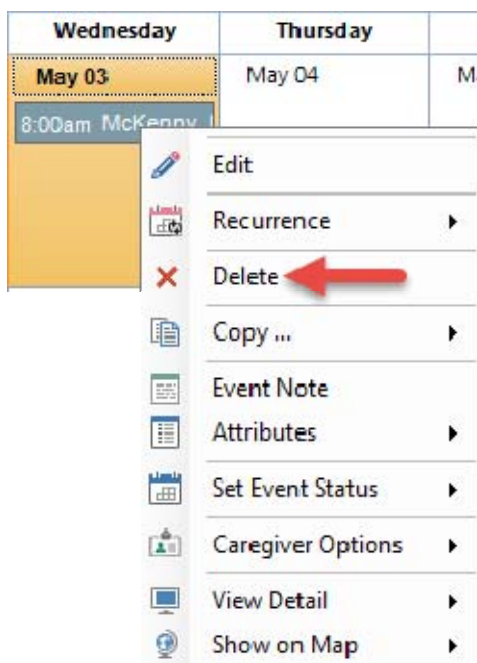
When you delete a schedule, the system will ask you to confirm Yes or No. If you click Yes, the system will then ask you to *Create a Documented Event* Yes or No. We recommend you say Yes to document why you are deleting the schedule for future audit traces.

Copying and Pasting Schedules

You can **Copy** one schedule and paste to many days at once using the **SHIFT** or **CTRL** keys on your keyboard.

- o Hold your *SHIFT* key down and drag your mouse pointer over many days, then paste the copied schedule to the highlighted days.

- o Hold your *CTRL* key down, then click individual days you want to paste the copied schedule *to*.
- o Copy an entire day's worth of schedules and paste to another day.
- o Copy an entire week's worth of schedules and paste to another week.

Drag and Drop Schedules

- In the Day View or Bubble View, you can drag and drop a schedule to another day.
- You can also resize a schedule, which will adjust the duration of the schedule.

Quick Clone a schedule

Quick Clone is another method of copying events which allows you to quickly copy one schedule over several weeks for specific days without setting up a recurring event.

How to Add a Recurring Schedule

What is a Recurring Schedule?

Schedules can be set up to be created automatically in a recurring pattern. A Recurring Schedule consists of a Recurrence Master record that outlines the details for the event, and the pattern that defines how schedules will be created on a recurring basis over a specified period of time. Individual schedules are automatically created using the Recurrence Master record as a template.

Setup a Recurring Schedule:

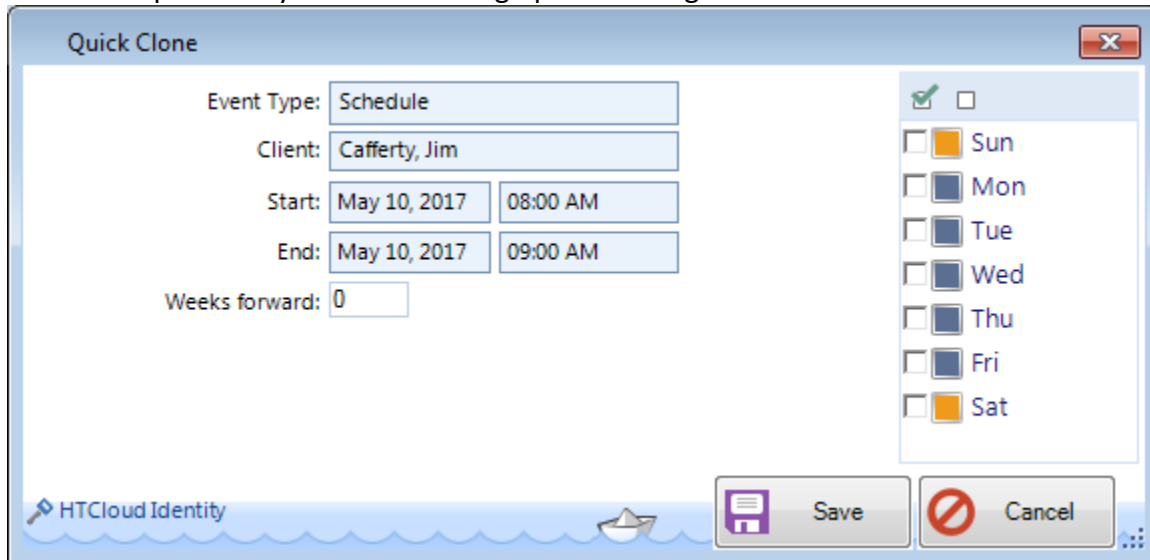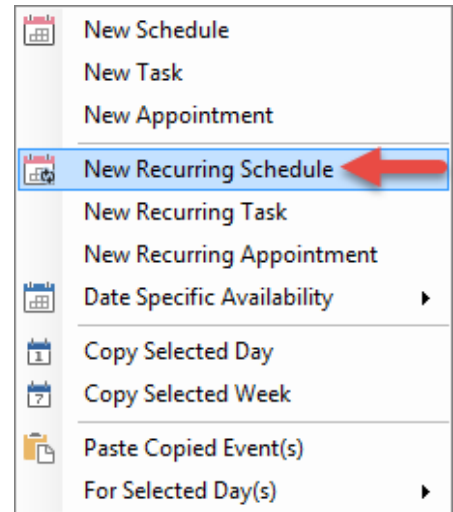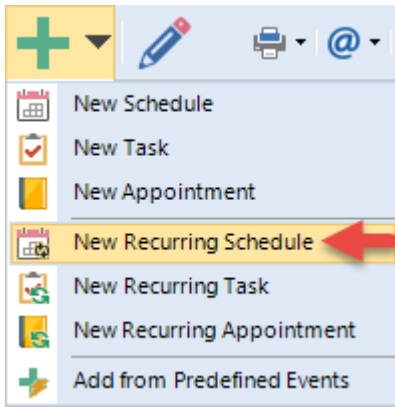You can setup a Recurring Schedule in two ways: click the drop-down arrow beside the Add button on the toolbar, or on the calendar itself. On the calendar, right-click on the date you want to add the new recurring schedule and click *New Recurring Schedule* from the menu.
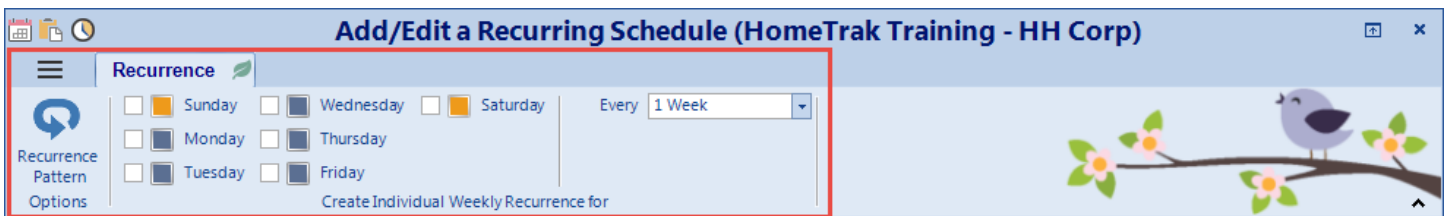
Click the drop-down on toolbar   -OR-   *Right-Click on Calendar Day*

On the screen **Add/Edit a Recurring Schedule,** enter the basic information for the schedules that will be created.

Example:

If the schedule will recur each week: Use the *Create Individual Weekly Recurrence for* tool. Click the box for the day(s) of the week you want to have the schedules created every week for the same start time, duration and day of the week.

If the schedules will recur in a pattern that is _NOT_ weekly: Use the *Recurrence Pattern* tool to set up a recurring schedule in a non-weekly pattern, such as every other week, or a certain day or date of the month or year (see next page).

If you are using the _Create Individual Weekly Recurrence for_ tool, you may receive a Warning and Errors message if there is a potential problem with the recurrence. Click *Yes* to ignore the errors and create the schedules; click *No* to return to the Recurring Schedule/Master Schedule and correct any error(s).

The schedules created will recur for the entire period the Authorization is valid, unless you specify otherwise. To limit the length of time the schedules will recur, click on the Recurrence Pattern tool in the ribbon at the top of the screen. The screen Setup a Recurrence will open. In the section Range of Recurrence, click on the End Date button and enter the date you want the schedules to end.

Click Save to close the screen. Then click Save on the screen Add/Edit a Recurring Schedule to save the Recurring Schedule/Master Schedule.

Now you will be able to see the recurring schedules in the calendars and other schedule module screens.

Recurrence Pattern Options

The **Recurrence Pattern** Options is designed to be used if you have special recurring patterns.

Examples:
- Daily every two, three or four days, etc.
- Weekly every two, three or four weeks, etc.
- Monthly every two, three or four months, etc.
- Special Monthly is repeated on a particular day of the month
- Yearly is every one, two or three years, etc.
- Special Yearly is repeated on a particular day of the year.

You can specify a **Start** and **End Date;** otherwise the default is *No end date*.
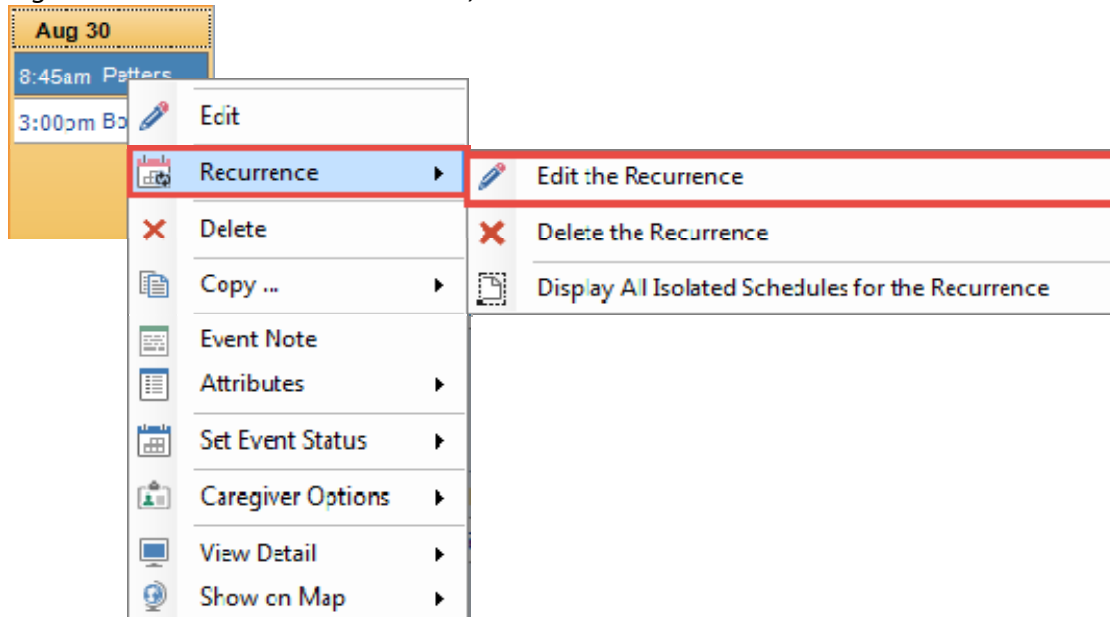
How to Edit a Recurring Schedule

You can *Edit* a recurring schedule on the calendar. Right-click on the recurring schedule you want to edit then click *Edit the Recurrence* from the menu.
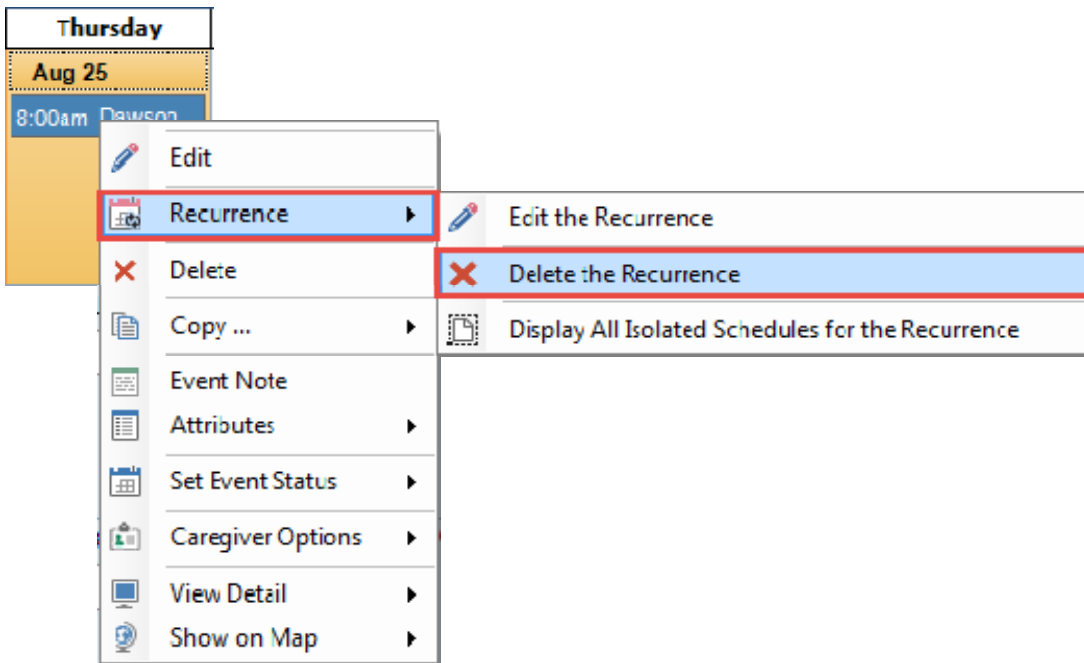
Right-Click on Schedule on Calendar, choose Recurrence then ***Edit the Recurrence***

Make changes to any fields and save.

How to Delete a Recurrence

To delete a Recurrence Master and all associated schedules you will right-click on the recurring schedule on the Calendar, then click **Recurrence**, then click *Delete the Recurrence*.

You will be prompted to confirm you want to delete. Click **Yes**. Another message will display advising the schedule is a recurring schedule and ask you to confirm that you also want to remove all of the open occurrences/schedules tied to the Recurrence. In most cases you will want to click **Yes**.

You must confirm again that you want it to remove all of the occurrences.

If you click **Yes**, the Master Recurrence and all of the open occurrences/schedules will be deleted.

If you click **No**, the Master Recurrence will be deleted, but all of the occurrences will remain and will now all be stand-alone schedules.

After deleting the recurrence, you will be prompted if you wish to create a Documented Event. (You may want to create a documented event to record why you are deleting the Recurrence Master and all of the schedules.) Select the appropriate option.

If you select **Yes**, the *Documented Event* screen opens containing pre-populated information for the recurring schedule you are deleting. Make any necessary changes to the Documented Event. Click Save to complete.

For further information on Scheduling within HomeTrak click here.