

Scheduling Guide

Prepared for

myUnity Essentials



Netsmart

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System Settings

Agency preferences are setup under **File > File Maintenance > System Settings** on the **Scheduling** tab. These include calendar start day, pay period info and color-coding options.

The screenshot shows the 'System Settings' dialog box with the 'Scheduling' tab selected. The dialog is divided into two main sections: 'Regular Nursing Settings' and 'Other Settings'.

Regular Nursing Settings:

- Care Type: Regular Nursing (dropdown)
- Default Charge: (empty dropdown)
- Default Time (mins): 30 (spinner) Color: Green (color picker)
- Default Time Usage: Minutes (dropdown)

Pay Period Info:

- Use Pay Period Info:
- Start: Sunday (dropdown)
- Hours Per Period: 40 (spinner) Warn Hours: 35 (spinner)

Other Settings:

- Calendar Start Day: Sunday (dropdown)
- Day Off Color: Yellow (color picker)
- Do Not Disturb Color: (empty color picker)
- Display Pay Rate Amount:
- Display End Time In Subject:
- Clone Scheduling Notes:
- Require Password on Unverify:
- Max Recur Visits: 90 (spinner)
- Recurrence Renewal Days Prior: 60 (spinner)

At the bottom, there are buttons for 'Save', 'Cancel', and a help icon.

Care Type Settings

Select a **Care Type**, then fill out additional Settings fields for the selected Care Type.

Default Charge: Select the default billable charge code for the Care Type selected above. Used for clients contracted for integrated Scheduling between Clinical and Billing.

Default Time (mins): Select a default visit length between 1 - 1439 (minutes) for the Care Type selected above. New schedules default to this visit length if actual start/end times aren't specified but can be changed.

Color: Select the color to be used for the Care Type selected above. The Scheduling Calendar window will show visits for this Care Type in the selected color.

Default Time Usage: Select Start & End Times or Minutes. Newly created schedules for the Care Type will default to the input field selected but can be changed.

Pay Period Info

Use Pay Period Info: Check this box to enable additional Pay Period Info settings in the section.

Start: Select the day of the week on which the pay period begins.

Hours Per Period: Select number of hours per pay period. Any hours over this are considered overtime.

Warn Hours: Select number of hours at which users will be warned when scheduling to assist in managing overtime hours.

Other Settings

Calendar Start Day: Select the start day of the week for calendar display

Day off Color: Select color to be displayed in Scheduling window for days employee is not working.

Do Not Disturb Color: Select color to be displayed in Scheduling window for times employee is not available.

Display Pay Rate Amount: If checked, the employee pay rate amount will be shown when scheduling or editing a visit.

Display End Time in Subject: If checked, visit end time will appear in the scheduled visit subject line in addition to the start time.

Clone Scheduling Notes: If checked, Scheduling notes will be copied from previous admission

Require Password on Un-verify: If selected, the program will require the Master Password when un-verifying a schedule.

Max Recur Visits: Defaults to 90 (max allowed). When creating Recurring schedules, this is the maximum number of schedules that can initially be created for a series. Additional schedules are created based on the setting for Recurrence Renewal Days Prior when the Maintenance routine is run (Scheduling Maint button) to renew recurrences.

Recurrence Renewal Days Prior: Defaults to 60 (max allowed). Enter number of days prior to the last scheduled visit when you want additional schedules to be created. Additional schedules are created when the Maintenance routine is run (Scheduling Maint button).

Setup

Schedule Groups, Zones, Unmade Visit Reasons and Work Shifts are setup under **File > File Maintenance > Category**.

Schedule Group

Schedule Groups is an option for color coding patients in the patient selection window for quick identification when scheduling. The grouping can be categorized based on agency need. For example, classify patients based on location or preferred employee. Patients are assigned to a Schedule Group in the Patient file Other tab.

Click on **File > File Maintenance > Category**, click **Change Type** and set to **Schedule Group**.

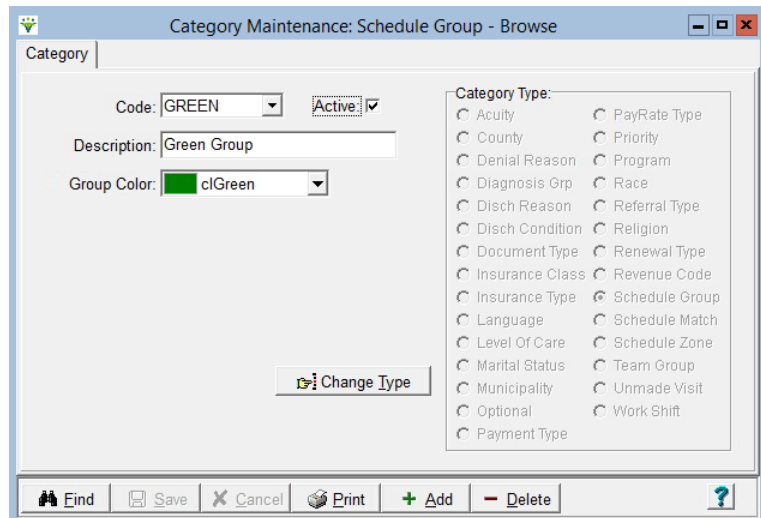
To create a Schedule Group, click the **Add** button.

Code: Enter a code (up to 12 alphanumeric characters, shorter is recommended)

Description: Enter a name for the group.

Group Color: Select a unique color (choose lighter colors for easier viewing).

Click **Print** to print a Schedule Group list.

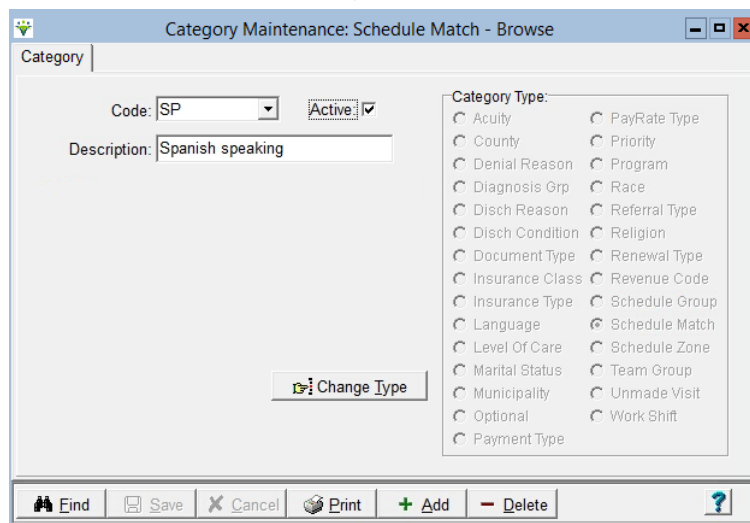


Schedule Match

Schedule Match is an option for matching patients to employees based on needs or preferences. For example, schedules can be assigned based on pet allergies or language spoken. Patient matching is setup in the **Patient** file **Other** tab. Employees are setup under **File > File Maintenance > Entity, Employee Type** via the **Time** button 'Matching' tab or from Scheduling in Employee view by selecting the employee and pressing the **Time** button. Matches can be utilized in Scheduling via the **Match** button when in Patient view.

Click on **File > File Maintenance > Category**, click **Change Type** and set to **Schedule Match**.

To add a Schedule Match, click the **Add** button.



Code: Enter a code (up to 12 alphanumeric characters, shorter is recommended)

Description: Enter a name

Click **Print** to print a Schedule Match list.

Schedule Zone

Schedule Zones is an option for assigning patients and employees to a geographic area to simplify matching them within a preferred proximity when creating schedules.

Patients are assigned to a Schedule Zone in the **Patient** file **Other** tab.

Employees are assigned under **File > File Maintenance > Entity, Employee Type** via the **Time** button or from Scheduling in **Employee view** by selecting the employee and pressing the **Time** button under Proximity Zones.

Zones are utilized in Scheduling via the **Filters** button. When a zone is specified, only patients assigned to that zone appear for selection (Note: patients not assigned to ANY zones will also appear).

When the filter is set to a specific zone, employees marked as primary for that zone appear in employee list highlighted in blue and employees marked as secondary for that zone appear in yellow (Note: employees not assigned to ANY zones will not be highlighted.)

Click on **File > File Maintenance > Category**, click **Change Type** and set to **Schedule Zone**.

To add a Schedule Zone, click the **Add** button.

Code: Enter a code (up to 12 alphanumeric characters, shorter is recommended)

Description: Enter a name for the zone.

Click **Print** to print a Schedule Zone list.

Unmade Visit Reason

Unmade Visit Reasons are used to track why schedules visits didn't take place. The **Schedule > Cancellations** report can be run to review unmade visit reasons.

Click on **File > File Maintenance > Category**, click **Change Type** and set to **Unmade Visit**.

To add an Unmade Visit Reason, click the **Add** button.

Code: Enter a code (up to 12 alphanumeric characters, shorter is recommended)

Description: Enter a name for the zone.

Click **Print** to print an Unmade Visit Reason list.

Work Shifts

Work Shifts is an option for creating standard agency shifts to which employees can be assigned. Days an employee is not assigned to work appear with a yellow square icon in the scheduling window as a visual indicator to the Scheduler to not create visits for the employee on that day. Employees are assigned to work shifts under **File > File Maintenance > Entity, Employee Type** via the **Time** button or from Scheduling in Employee view by selecting the employee and pressing the **Time** button.

Click on **File > File Maintenance > Category**, click **Change Type** and set to **Work Shift**.

To add a shift, click the **Add** button.

Code: Enter a code (up to 12 alphanumeric characters, shorter is recommended)

Description: Enter a name for the shift.

Work-Shifts tab:

Check the box for that shift's active days of the week and enter the start & end times for the shift.

Click **Print** to print a Work Shift list.

Creating and Editing Appointments

Creating an Appointment

Double-click in the calendar to create an appointment for that day, or if authorizations exist for a patient you can drag the authorization info on left panel to a date on calendar to bring up the appointment editor.

Authorization: Select an authorization to attach the appointments to as entered in Patient file Authorize tab.

Charge Code: Select the billing charge code to be used for the appointments.

Employee/Patient: Select either the employee, if known at time of appointment creation, or patient.

Employee Unknown: If the employee is not known at the time of appointment creation, check this box instead of designating an employee (shown in Patient mode only).

Non-Visit Time: check to have the Charge Code box switch to showing only Non-Visit time 'charges' (shown in Employee mode only)

Use Start/End Time: check to enter Start and End Times for the appointment (leaving unchecked will create the appointment for midnight on the selected day) instead of entering Duration.

Duration: enter the total appointment duration (in minutes) if not entering specific Start/End times.

Mileage: enter appointment mileage information (optional)

Status: defaults to Scheduled when an appointment is being created. Can be changed to Unmade (with unmade reason) or Verified (Completed).

Pay Rate: select the employee Pay Rate for the appointment (optional)

\$: enter an override employee Pay Rate amount for this appointment (optional)

Schedule Info tab:

Based on the selection made in the **Authorization** dropdown, appointments that fall under that selection category will display. Also shows additional appointments on that day.

Cancellation History tab:

Allows for tracking reason why an appointment was cancelled and whether the cancellation was patient initiated or not.

Schedule Notes tab:

Notes for the appointment can be entered here and will show on the weekly Calendar Report and Scheduling Report. 255 character maximum.

Create a Recurring Appointment

To create a recurring appointment, follow the same steps for creating a single appointment, but press the **Recur** button at the bottom of the window to access the **Event Recurrence** information.

Event Time

Enter the recurring Start/End times or Duration.

Recurrence Pattern

Enter the Recurrence pattern (daily, weekly, monthly, yearly) and frequency.

Range of Recurrence

Enter the Start Date and choose to end after a specified number of recurrences or choose an End Date.

If entering a specified number of recurrences, the maximum number allowed for creation is determined by the Max Recur Visits option in System Settings.

- If creating the max number of occurrences allowed, the “Automatically Renew Recurrence” checkbox will automatically be checked on the New Appointment window when the user exits the routine.
- If creating a number of occurrences within 5 visits of the max allowed, the user will be prompted as to whether they want the “Automatically Renew Recurrence” box to be checked.
- If creating for a number of occurrences fewer than 5 of the max allowed, the “Automatically Renew Recurrence” box will not be automatically checked and the user will not be prompted. The user can still check the box if needed.

If more schedules are needed beyond the maximum number initially created, generate them via the [Maint](#) button on the main Scheduling window.

Once a recurrence is saved, the event recurrence information cannot be edited (e.g. the Start/End times, recurrence pattern and range information). If that information needs to be altered, you will need to end (or delete) the original recurrence and create a new one.

You cannot change a previously created appointment into part of a recurrence. It can only be done when making a new appointment.

Editing an Appointment

Double-click the appointment to edit. If editing an appointment that was created as part of a recurrence, you be prompted to choose whether the edit is for the selected occurrence or the entire series. Make your selection and press **OK**.

In the Edit Scheduled Appointment window, adjust information as needed. The **Recur** button is not enabled in edit mode. In order to change the Recurrence information, you must end or delete the original recurrence and add a new one instead. All other fields can be edited here.

Edit Scheduled Appointment For Phelps, Michael (90063)

Service Date: 5/27/2020
 Authorization: Unauthorized Visits
 Charge Code: HHA - HHA Visit
 Patient: Abbington, Norma Jean (131753)
 Non-Visit Time:
 Use Start/End Time
 Start: 9:00:00 AM End: 11:30:00 AM
 Duration: 150 minutes Mileage: 0
 Status: Scheduled
 Pay Rate: \$

Schedule Info | Cancellation History | Schedule Notes

Unauthorized (1v: 2.5 h : \$0)
 =====
 05/27/20 HHA (HHA Visit) [Phelps, Michael(90063)]

Employee Schedule for 5/27/2020
 =====

Find Save Cancel Recur

Canceling an Appointment

Double-click the appointment to be cancelled.

From the **Status** dropdown, select the reason the visit was Unmade.

In addition, the **Cancellation History** tab can be utilized if the visit is going to be rescheduled and you want to track the original reason for cancellation. Press the “+” button to add a cancellation date. Reason and whether the cancellation is patient initiated or not. If the appointment is not going to be rescheduled, change the Charge Code to a “Missed Visit” charge for tracking purposes.

Edit Scheduled Appointment For Phelps, Michael (90063)

Service Date: 5/27/2020
 Authorization: Unauthorized Visits
 Charge Code: HHA - HHA Visit
 Patient: Abbington, Norma Jean (131753)
 Non-Visit Time:
 Use Start/End Time
 Start: 9:00:00 AM End: 11:30:00 AM
 Duration: 150 minutes Mileage: 0
 Status: Unmade - Patient Cancelled
 Pay Rate: \$

Schedule Info | **Cancellation History** | Schedule Notes

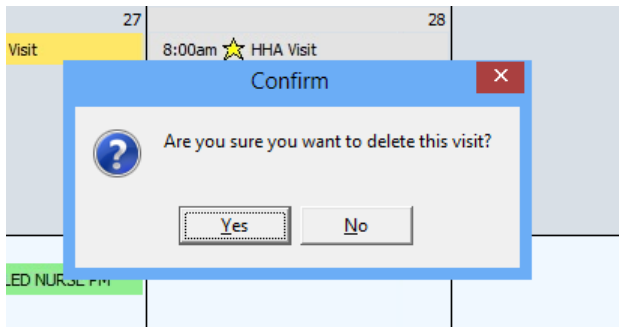
Date	Pat Init	Reason	Employee
5/26/2020	<input type="checkbox"/>	Bad Weather	90063 - Phelps, Michael

Scheduled
 Verified
 Unmade - Patient Cancelled
 Unmade - Patient Hospitalized
 Unmade - Employee Cancelled
 Unmade - Bad Weather
 Unmade - Patient Not Home

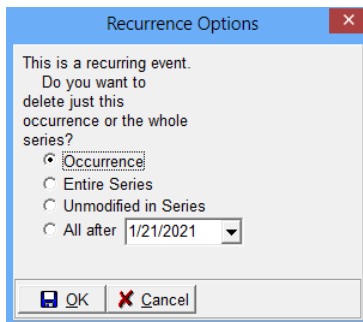
Find

Deleting an Appointment

To delete an appointment, click on the appointment in the calendar view to select and press the **Delete** button your keyboard. Select "Yes" at the prompt.



If the visit is part of a recurrence, select to delete the selected occurrence only, all appointments in the series, only unmodified appointments in the series or to delete all after a specified date.



Scheduling Functions

Change the Calendar View

Schedule Load/Maintain allows you to create and maintain appointments, verify visits, track employee time off, and show employee or patient calendars in daily, weekly, or monthly view. The name displayed at the top center of the window indicates Patient or Employee view. Use the **Emp** or **Pat** button (bottom of calendar window) to toggle between views.

The screenshot displays a scheduling application window. At the top, the title bar reads "Admit, Andy". The main area is a calendar grid with columns for days of the week (Sunday through Saturday) and rows for dates. The dates shown range from Sunday, January 3, to Saturday, February 6. A yellow highlight is visible on the date January 21. On the left side, there is a sidebar with several sections: "Patient" (Admit, Andy (1022)), "Employee" (Beck, Becky (9006-9)), and "Authorized Disciplines" (listing various roles like Regular Nursing, Physical Therapy, etc.). At the bottom of the window is a toolbar with icons for "End", "Filter", "Notes", "Emp", "Time", "Options", "Match", and "Maint".

To change the days displayed in the **Calendar View**, click and drag in the calendar area in the upper left corner of the window. Select anywhere from 1 day up to 6 weeks.

Daily View:

The screenshot shows the Scheduler interface in Daily View. The window title is "Scheduler". The patient name is "Admit, Andy". The calendar on the left shows January 2021 with the 21st highlighted. The main grid shows a single column for Thursday, January 21, with time slots from 7:00 to 3:00. An orange arrow points from the date "21" in the calendar to the corresponding column in the grid.

Weekly View:

The screenshot shows the Scheduler interface in Weekly View. The window title is "Scheduler". The patient name is "Admit, Andy". The calendar on the left shows January 2021 with the 21st highlighted. The main grid shows a week view from Sunday, Jan 17 to Saturday, Jan 23, with time slots from 7:00 to 3:00. An orange arrow points from the date "21" in the calendar to the corresponding column in the grid.

Monthly View:

The screenshot shows a monthly scheduling interface for a patient named 'Admit, Andy'. The calendar grid displays dates from Sunday, December 27, to Saturday, January 6, 2021. The patient information sidebar on the left includes details such as address (123 main st, citytown, NJ 04545 454), phone number (787-878-7877), diagnosis (Dx: 1020 - Rheumatic c), and insurance (Ins: PPS with Auth Req). The employee information sidebar lists 'Beck, Becky (9006-6)' with a list of authorized disciplines including Regular Nursing, Physical Therapy, Speech Therapy, Occupational Therapy, Medical Social Service, Home Health Aide, Respiratory Therapy, Room & Board, Personal Care Aide, Licensed Practical Nurse, Palliative Care/Physician Srv, and Housekeeper. A toolbar at the bottom contains icons for End, Filter, Notes, Emp, Time, Options, Match, and Maint.

Selecting Patients/Employees

Use the **Find** button to search for a Patient or Employee whose calendar you want to view. The **Filter** button controls which patients and employees are available for selection (see [Scheduling Filters](#)).

Filter Button

The **Filter** button allows users to narrow down patient and employee search selection.

The 'Scheduling Filter Options' dialog box is shown with the following settings:

- Patient Select:**
 - All Patients
 - All Active Patients As Of: 1/21/2021
 - Patients With Authorization Needs
 - Selected Day
 - Week of Selected Day
 - Calendar Range
- Match Criteria:**
 - Active Employees Only
 - Include Contract Employees
 - Available Modalities
 - Employee Availability
 - Match Special Needs
 - Proximity: 0 Zones
- Only Show Employees in:**
 - Regular Nursing
 - Physical Therapy
 - Speech Therapy
 - Occupational Therapy
 - Medical Social Service
 - Home Health Aide
 - Respiratory Therapy
 - Room & Board
 - Personal Care Aide
 - Licensed Practical Nurse
 - Palliative Care/Physician Srv
 - Housekeeper
- Select Schedule Zones:**
 - Northern Monmouth
 - Northern Ocean
 - Southern Monmouth
 - Southern Ocean
- Patient Unit Mode:** [Dropdown menu]
- Staffing Agency Mode:** [Dropdown menu]

Buttons for OK and Cancel are located at the bottom left.

Patient Select

Note: the system will always default to all patients active as-of today's date each time the Scheduling window is opened.

All Patients – all patients are available for selection.

All Active Patients As Of [date] - Only patients who are not discharged prior to the specified date are available for selection.

Patients With Authorization Needs - Select to show patients who have an authorization on file for one of the following options.

Selected Day – filter on patients with an authorization on file for the selected calendar day.

Week of Selected Day – filter on patients with an authorization on file for the selected calendar week

Calendar Range – filter on patients with an authorization on file for the selected calendar range.

Match Criteria

Active Employees Only - when checked, only Employees with the Active box checked in the Employee file are available for selection.

Include Contract Employees - when checked, Employees marked as Contract Employee (Employee file 'Other-Info' tab) are available for selection.

Note: Additional options shown in gray are reserved for future use.

Only Show Employees In

Select one or multiple modalities to show only Employees for those care types. For example, if scheduling for RN or LPN visits, check Regular Nursing and Licensed Practical Nurse to select from Employees assigned to either modality.

Care Types are created in **System Settings** under the Reporting tab and linked to Modalities on the Modality tab

Care types are assigned to employees under **File>File Maintenance>Entity Type>Employee>Other-Info** tab.

Patient Unit

Check the box next to **Patient Unit** mode to open the drop-down box for a Unit selection. This feature allows you to see only patients for the selected Unit.

Staffing Agency Mode

Check the box next to **Staffing Agency Mode** to open the drop-down box for a Staffing Agency selection. (Staffing Agencies are created as "Employee" records in HAS)

Staffing Agency mode automatically puts you into the Patient view and disables the ability to toggle to Employee view (**Emp** button will be grayed out). The system will not warn on schedule overlaps like it would if an individual employee was selected.

All schedules created for patients will automatically have the selected Staffing Agency assigned as the “employee.”

If the box is grayed out, it’s an indication that no employee records are marked as a Staffing Agency.

Select Schedule Zones

See [Schedule Zone](#).

Notes Button

The **Notes** button allows you to view or enter scheduling-related notes for the selected Patient or Employee (can also be accessed from the Patient or Employee file). For Patient **Scheduling Notes**, a **Directions** note tab is also available.

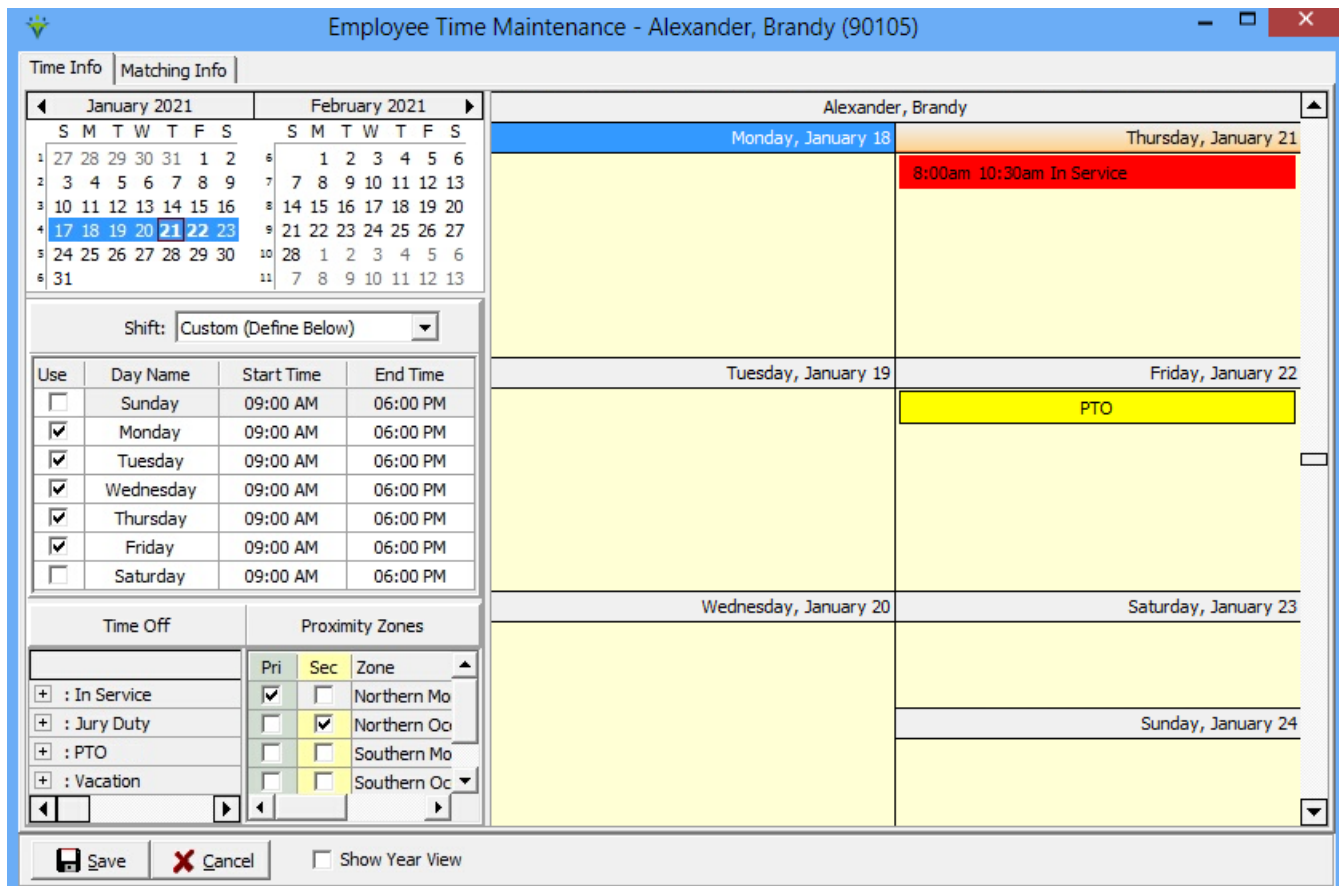
Use the **Print** button to print a copy of the notes or save to PDF.

Pat / Emp Button

Toggles between Patient Calendar or Employee Calendar view.

Time Button

The **Time** button accesses the Employee Time Maintenance window where users can assign employees to shifts and schedule zones, add or edit scheduled time off (only available in Employee mode; use **Emp** button to toggle to Employee mode).



To change the days shown (default is one year), uncheck **Show Year View** at the bottom of the window, then click and drag in the upper left calendar area to change the view shown on the right. Select from 1 day up to 6 weeks (view is saved until Scheduling window is closed).

Shift

Select a standard [Work Shift](#) (created under File>File Maintenance>Category) or create a custom shift for the employee.

Create a Time Off Event

Double-click on a calendar day on the right to create a **Time Off** event for that day.

Enter a time off reason in the **Subject** field along with a **Label** of Scheduled Time Off or Do Not Disturb.

Proximity Zones

See [Scheduling Zone](#).

Options Button

The Scheduling Options button allows the user to set screen preferences for information displayed the Scheduling window.

Show Times As Clock: If unchecked the start/end times will show on the calendar (i.e. 8:00am 9:30am). If checked a clock icon will appear instead:

Retroactive Day Count: Enter the number of days prior to today you wish to view in scheduling. Note, the larger the number specified, the slower the processing speed may be.

Do not check for visit Overlap: Select if you do not wish to check for duplicate visits.

Do not display employee Stats: Select if you do not wish to have the employee's total # of hours/visits display on the employee calendar screen.

Stop DC/Recurs

The Stop DC button has been replaced with the Maint button (see below).

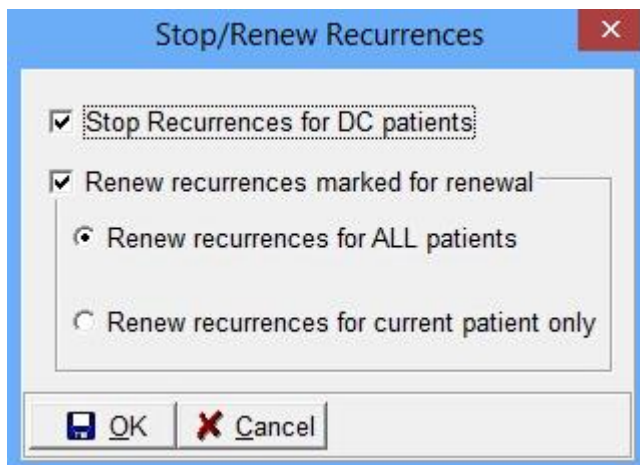
Maint

The Maint button allows running of two maintenance routines.

Stop Recurrences for DC Patients: checking this box looks at discharged patients and removes scheduled appointments that occur after their discharge date.

Renew recurrences marked for renewal: Select 'Renew recurrences for ALL patients' to create appointments for all patients who have recurrences setup. Select for 'Renew recurrences for current patient only' to create additional recurring appointments for the patient selected in the Scheduling window.

Note: Only recurrences that have been marked to Automatically Renew and are eligible for renewal based on the Recurrence Renewal Days Prior system setting will generate new schedules.




Refresh

The refresh button reloads the calendar page to display the most recent changes.


Icons




A star on the appointment indicates both the employee and calendar who are selected on the left panel are participants in the visit. An "R" inside the star indicates the appointment is part of a recurring series. A "C" inside the star indicates the appointment is part of a recurring series but has been Changed (e.g. moved to a different day of the week than the other appointments in the series).

 A calendar on the appointment indicates the patient/employee combination selected on the left are not both participants in the visit. A “P” indicates the visit is Pending (initiated but not marked completed in Clinical).

 A checkmark on the appointment indicates it’s marked completed/verified.

 Double facing arrows indicate the appointment is part of a recurring series.


 A dollar sign indicates the appointment has been billed.


 A question mark indicates the appointment doesn’t have an assigned employee.


 An exclamation point indicates the appointment Status is unmade/cancelled.

N A “N” indicates the appointment is not a visit appointment (scheduled In Service time, for example). An “R” overlay indicates it’s a recurring non-visit appointment and a “C” overlay indicates it’s part of a recurring series but has been Changed (moved to a different day of the week than the other appointments in the recurrence).

P A “P” indicates the appointment is “in process” and can’t be edited until its completed/verified from Clinical.

 A yellow or red circle on the calendar view indicates the employee is scheduled for [Time Off](#) on that day (colors shown may vary based on System Settings for Day Off and Do Not Disturb settings).

 A partially filled circle on the calendar view indicates the employee is scheduled for part of the day off. The ‘pie slice’ portion indicates approximate time off. A yellow ‘pie slice’ color indicates the time off starts in the AM. hours. A blue slice indicates time off starts in the PM hours. In this example, the employee has time off from 12pm – 3pm.

 A yellow square on the calendar view indicates the employee has the day off as defined by their normal [Work Shift](#) assignment (color shown may vary based on System Settings for Day Off).

Reports

Calendar

Schedule Calendar provides the ability to print out employee and patient schedules in a weekly or monthly calendar format. Also provides an Agency view report of all schedules.

Click on **Schedule>Calendar**.

Report Sequence: Choose Employee or Patient (employee calendar or patient calendars will print based upon selection)

Selection Type: Chose All Records or individual Employees/Patients/Units

Report Type: Choose Month/Week/Agency view

Care Type: Choose all Care Types or individual ones for previewing/printing

Start Date: Enter date on which the calendar should begin printing

Start Day: Select the day of the week on which the calendar should begin

Time Selection: Leave Active box unchecked to include all schedules on the calendar. If checked, only schedules occurring between the Start and End times entered will be included.

Schedule Zone: choose All zones or uncheck the box and select specific Zones from the dropdown.

Report Detail:

Scheduled With Employee: Check the option to show schedules to which an employee is assigned

Scheduled Without Employee: Check the option to show scheduled entered without an employee assigned

Un-Made Visits: Check the box to include visits that were marked as Un-Made in the Status field of the Edit Schedule window.

Un-Made Only: Check this to see only visits that have been marked Un-Made in the Status field of the Edit Schedule window.

Display One Line Per Visit: check this to see one line per schedule on the report (Monthly view only). An abbreviated name, charge code and start time will print. If unchecked, 2 lines will print including start/end times.

Use Patient Code Instead of Name: check to show patient code and not include the patient name on the report

Verified Visits: check to include schedules that have been marked verified through Charge>Enter/Maintain or Scheduling

Billed Visits: check to include visits that have been billed (Verified Visits must also be checked to use this option)

Phone/City/State: check to include patients' city, state, and phone number. Only available for Week View report type in Employee sequence.

Non-Scheduled Visits: check to include visits that were entered via Charge > Enter/Maintain, not through Scheduling.

Show Max Days: if checked will show as many calendar days as can fit on the page (6 weeks). Only available for Month View.

Font Size: enter a value between 4 and 9. Standard setting is 8. A font size of 9 may cause fewer daily schedules to be able to fit in the box.

Sample Monthly Scheduled w/out Employee Calendar:

3/5/2020 8:17:45 AM

Schedule Calendar
From:3/1/2020 To:3/31/2020

Emp-Needed
Home Health Care Services

Non-Specified Employee

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	2 Ives, Burl RN 12:00 a 12:00 a Henderson, Harry HHA 08:00 a 11:00 a	3 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	4 Henderson, Harry HHA 08:00 a 11:00 a	5 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	6 Henderson, Harry HHA 08:00 a 11:00 a	7 Henderson, Harry HHA 08:00 a 11:00 a
8 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	9 Ives, Burl RN 12:00 a 12:00 a Henderson, Harry HHA 08:00 a 11:00 a	10 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	11 Henderson, Harry HHA 08:00 a 11:00 a	12 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	13 Henderson, Harry HHA 08:00 a 11:00 a	14 Henderson, Harry HHA 08:00 a 11:00 a
15 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	16 Ives, Burl RN 12:00 a 12:00 a Henderson, Harry HHA 08:00 a 11:00 a	17 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	18 Henderson, Harry HHA 08:00 a 11:00 a	19 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	20 Henderson, Harry HHA 08:00 a 11:00 a	21 Henderson, Harry HHA 08:00 a 11:00 a
22 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	23 Ives, Burl RN 12:00 a 12:00 a Henderson, Harry HHA 08:00 a 11:00 a	24 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	25 Henderson, Harry HHA 08:00 a 11:00 a	26 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	27 Henderson, Harry HHA 08:00 a 11:00 a	28 Henderson, Harry HHA 08:00 a 11:00 a
29 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a	30 Ives, Burl RN 12:00 a 12:00 a Henderson, Harry HHA 08:00 a 11:00 a	31 Henderson, Harry HHA 08:00 a 11:00 a Aarons, Anthony RN 08:00 a 08:30 a				

Schedule Report

The Schedule Report provides the ability to view patient and employee schedules, including patient need and unmade visits in a list format. It has options to show patient appointments with no employee currently assigned, cancelled/unmade visits and non-scheduled visits to include visits created outside of the scheduling module (e.g. originated directly from a form instead of a frequency).

Click on **Schedule>Report**

Report Sequence: Choose Date/Employee, Employee/Date, Date/Patient or Patient/Date

Selection Type: Chose All Records or individual Patients, Employees, Units or Patient Teams

Care Type: Choose all Care Types or individual care types for previewing/printing

Date Selection: Enter a starting and ending date range for the report

Report Detail:

Scheduled With Employee: check to include appointments with a designated employee

Scheduled Without Employee: check to include appointments that don't have an employee assigned yet.

Un-Made Visits Only: check to show only visits marked Unmade or Cancelled

Show City/State/Phone: check to include the patient City/State/Phone on the report

Page Breaks: check to have the report begin a new page based on the Report Sequence option chosen.

Expanded Patient Information: check to include a box for each patient shown that includes their Name, Address, Phone, Emergency contact and Doctor information.

Verified Visits: check to include visits that have been marked Verified/Completed.

Only: check to have the report show only visits that have been marked Verified/Completed (Verified Visits must be checked).

Billed Visits: check to include visits that have been billed (Verified Visits must be checked).

Non-Scheduled Visits: check to include visits that originated outside of the Schedule module.

Show Charge Description: check to show the charge code and description on the detail lines.

Chg-Code Instead of Type: check to show the Charge/Billing Code instead of the Care Type in the Type column.

Sample Report:

Type	Employee	Start-Time	End-Time	Visit-Time
3/5/2020 9:38:44 AM Patient/Date Sequence				
Schedule Report				
All Records From:1/1/2000 To:1/31/2020 Scheduled Emp-Needed Non-Sched-n			Page 1 Home Health Care Services	
Abrams, Allena: 131271				
Wednesday, March 21, 2018				
RN	Non-Specified Employee Collingswood, NJ	732-954-8723		0.50
			Total Day:	0.50
Wednesday, November 20, 2019				
RN	ABC, Staffing Company: 953 Collingswood, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
			Total Patient:	1.00
Allgood, Alberta: 131265				
Monday, December 2, 2019				
RN	Barney, Dino: 90057 Red Bank, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
Tuesday, December 10, 2019				
RN	Barney, Dino: 90057 Red Bank, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
Wednesday, December 11, 2019				
RN	Barney, Dino: 90057 Red Bank, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
Thursday, December 12, 2019				
RN	Barney, Dino: 90057 Red Bank, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
Friday, December 13, 2019				
RN	Barney, Dino: 90057 Red Bank, NJ	732-954-8723	08:00 am 08:30 am	0.50
			Total Day:	0.50
			Total Patient:	2.50

Availability

The Schedule Availability Report provides a way to view employees available to be scheduled. Additional options allow the user to obtain a list of employees who are available to be scheduled on a specific day/time based on designated limits and Care Types specified and to ignore scheduled Time Off if selected.

Click on SCHEDULE>AVAILABILITY

Schedule Availability

General Options

Date Selection:
Available: 1/1/2020

Time Selection:
 Check Time
Start: 8:00:00 AM
End: 6:00:00 PM

Hour/Visit Limits:
 Check Limits
Daily Hour Limit: 8
Daily Visit Limit: 4

Care Type:
 Regular Nursing
 Physical Therapy
 Speech Therapy
 Occupational Therapy
 Medical Social Service
 Home Health Aide
 Respiratory Therapy
 Room & Board
 Personal Care Aide
 Licensed Practical Nurse

Report Detail:
 Show Visit Detail
 Ignore Time Off

Preview Print ?

Date Selection

Available: Enter a date or select from the dropdown calendar to specify the date to evaluate for employee availability

Time Selection

Check Time: Check the box to open up the Start/End fields. Only employees not already scheduled for the date/time specified will appear on the report.

Hour/Visit Limits

Check Limits: Check this box to view only employees who have not exceeded the daily limits specified for the given date.

Daily Hour Limit: Enter a number. Only employees who have not been scheduled for more hours than the number specified will be included.

Care Type: Leave all checked or select individual care type(s) for reporting.

Report Detail

Show Visit Detail: Check this to see schedules/charge detail for employees shown

Ignore Time Off: Check this to include employees who have time off scheduled for the given date.

Sample Report:

3/5/2020 9:25:19 AM

Scheduling Employee Availability

Page 1

Availability for Thursday, March 05 2020
From: 09:00 am To: 05:00 pm

Max Visits: 4 Max Hours: 8
Modalities: RN;

Home Health Care Services

Employee	Address	Phones
Alldisciplines, Employee: E908		
Visit Detail for: Alldisciplines, Employee		
RN	Abrams, Allena: 131271 Collingswood, NJ	732-954-8723
		SKILLED NURSE PM: 0551G0154PM
		Visit-Time: 1.00
Baker, Tammy: 90099		
	PO Box 108, Garfield, NJ 84634	
Visit Detail for: Baker, Tammy F		
RN	Kelly, Kelly: 223 Citytown, NJ	000-000-0000
		Skilled Nursing Visit: SNVT
		Visit-Time: 1.00
Ball, Lucille: 955		
	123 Apple St., Hollywood, CA 90210 0000	
Barney, Dino: 90057		
	13 East Center, Garfield, NJ 84634	
Bates, Cathy: 90092		
		(C) 000-000-0000
Biehler, Bonnie: 90029		
	654 French Creek Way, Red Bank, NJ 08745	
Bjorling, Bjork: 90129		
	80 N 100 W, Red Bank, NJ 84652	
Blaine, David: 90082		
BonJovi, Jon: 90065		
	70 East 1100 North, Red Bank, NJ 84701	
Burton, Tim: 90112		
		(C) 000-000-0000
Visit Detail for: Burton, Tim		
RN	Inqalls, Laura: 131645 Red Bank, NJ	732-954-8723
		08:00 am 08:45 am
		SKILLED NURSE PM: 0551G0154PM
		Visit-Time: 0.75
RN	Yoon, Jun: 246	000-000-0000
		01:00 pm 01:45 pm
		Skilled Nursing Visit: SNVT
		Visit-Time: 0.75

Cancellations

The Cancellations report provides the ability to review cancellations by date, reason, or employee. Unmade Visit reasons can be added or maintained under File > File Maintenance > Category, Change Type to Unmade Visit.

Click on SCHEDULE>CANCELLATIONS

Report Sequence: Choose Date/Reason, Reason/Date or Employee/Date order.

Selection Type: Choose All Records or Specific Patients/Employees/Units

Care Type: Check all Care Types or individual ones to be reported on.

Date Selection: Enter the desired schedule From and To Date range to be reported on.

Un-Made Visits Only: If selecting "Un-Made Visits Only" the report will only show visits that were marked as un-made. If this is un-checked, then the report will also include any visit that was re-scheduled but has cancellation history.

Sample Report:

3/5/2020 8:04:01 AM Date/Reason Sequence	Schedule Cancellations All Records From:01/01/2000 To:12/31/2200	Page 1 Home Health Care Services			
Cancel-Date	Reason	Visit-Date	Employee	Patient	
Thursday, November 21, 2019					
11/21/2019	Bad Weather Start: 10:00 am Stop:09:30 am	11/22/2019	Burton, Tim: 90112	Walsh, Brandon: 199	
			Type: RN	Time: 23.50	
				Total Time:	23.50

Time Sheets

Time sheets can be printed for employees for confirmation of their visits.

Click on SCHEDULE>TIME SHEETS

Report Sequence: Timesheets print out separately for each employee, one patient per time sheet.

Selection Type: Can be run for all records, or for specific patients, employees or units.

Care Type: Check the care types to be included on the time sheets.

Date Selection: Time sheets will only be printed for the selected records that have visits scheduled/entered within the selected from and to dates.

Report Detail

Scheduled With Employee: check to only include appointments with an employee assigned.

Non-Scheduled Visits: Check to also include visits created outside of the Scheduling module.

Optional Program Services: Check if you don't want to include the visit Care Type description in the Services box on the time sheet.

Company Address from Unit: Check to print agency address based the patient Unit instead of System Settings.

Show Missing Days in Period: If selected, when time sheets are run for a date range, if the patient does not have services on one of those days, the day will appear on the time sheet with "XXX" for the hours and times.

Show Other Employees: If selected, the names of other employees who have visits scheduled with that patient will appear in the Services box.

Show Authorized Time: If selected, the number of authorized hours set up for the patient under Patients>Authorizations will print under the employee and client numbers on the top right corner of the time sheet.

Sample Report:

3/5/2020 9:34:57 AM

Timesheet

Home Health Care Services
987 Hwy 35
Lincroft, NY 08475 0987

Employee Number: 953
Client Number: 1029

ABC, Staffing Company

This form lists the work schedule and services you are required to provide to the client.
1) Fill in the record of time, 2) Total the time, and 3) Sign to confirm the hours worked.
Esta forma lista el horario del trabajo y las tareas que usted esta requirida a proporcionar a este cliente. 1) Llene el registro de horas trabajada, 2) Totalize el tiempo, y 3) Firme esta forma para confirmar las horas trabajada y las tareas proporcionadas.

Period of Service Fechas De Servicio 1/5/2020 - 1/11/2020	Client: Test, MSP: 1029 Burlington NJ, NJ	NOTE: Claiming services not provided constitutes fraud. NOTE: Cobrar servicios no provistos constituye fraude.
-----------------------------------------------------------------	-----------------------------------------------------	-------------------------------------------------------------------------------------------------------------------

Services Tasks Assigned for This Client / **Schedule** Authorized Hours / **Log** Record of Time Worked

* Home Health Aide	Hours	Date	From	To	Day	◆
	x.xx	01/05/2020	xx:xx	xx:xx	Sun	
	4.00	01/06/2020	12:00 am	12:00 am	Mon	
	xx:xx	01/07/2020	xx:xx	xx:xx	Tue	
	x.xx	01/08/2020	xx:xx	xx:xx	Wed	
	4.00	01/09/2020	12:00 am	12:00 am	Thu	
	x.xx	01/10/2020	xx:xx	xx:xx	Fri	
	x.xx	01/11/2020	xx:xx	xx:xx	Sat	
Client Signature: _____						
Client Signature _____ Date _____						

Total Expected Hours: 8.00	Total Time Totalize el Tiempo	<input type="text"/>
Supervisor Review: I certify that to the best of my knowledge the employee has worked the hours and completed the tasks assigned. Certifico haber trabajado las horas registradas en este recordario haber hecho las tareas asignadas.	Signature Firme Firma	<input type="text"/>
Supervisor Signature _____ Date _____	Signature _____ Date _____	