



MatrixCare Home Care

Release Notes

Version: 2020 R3



MatrixCare™ Home Care Release Notes

This document was written for use with MatrixCare Home Care 2020 R3 (V1.65) or greater.

© June 2020 MatrixCare is a registered trademark of MatrixCare. All rights reserved. Other products are trademarks or registered trademarks of their respective holders.

This document and the software it represents are the exclusive property of MatrixCare. Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may in whole or in part be reproduced, stored in a retrieval system, or transmitted in any form, or any means electronic or mechanical including photocopying and recording for any purpose other than the purchaser's personal use without prior consent, in writing, from MatrixCare.

Companies, names, and data used in examples herein are fictitious unless otherwise noted.

MatrixCare
11555 Heron Bay Blvd
Suite 301
Coral Springs, FL 33076
Support: 561-447-7111
Support E-mail: hc-support@matrixcare.com

Main: 561-447-7111
Fax: 954-827-0558
URL: <http://www.matrixcare.com>

Document Revisions

Date	Change Details
6/20/2020	Original version.

Table of Contents

MatrixCare Home Care 2020 R3 Release Notes	1
Back Office Feature Updates.....	1
Sandata Rhode Island EVV Aggregator Integration.....	1
Billing	2
MassHealth AFC 837P Extract File	2
Scheduling.....	2
Telephony Call Review - Filter by Coordinator	2
Duration Changed Flag Ignored when the Actual Duration is Less than the Scheduled Duration	4
Payroll	6
Paychex Preview Allocation Payroll Extract	6
Reports.....	7
Updated Draft Payroll Travel Time Verification Report	7
5371 Simple Alt Caregiver Name Badge Report is available on the Caregiver Reports tab	10
SMS Caregiver Wellness and Work Reminders.....	13
Office Settings.....	14
Caregiver Record Setup	15
Activating Caregiver Wellness and Work Reminders	16
Mobile Updates	18
Added “Thank you for being a caregiver!” Message on Checkout.....	18

MatrixCare Home Care 2020 R3 Release Notes

To use MatrixCare Home Care 2020 R3 successfully, MatrixCare recommends that you read the entire contents of these release notes for an understanding of enhancements and updates. Contact MatrixCare Home Care support for assistance in using these updates at 561-447-7111.

Back Office Feature Updates

Sandata Rhode Island EVV Aggregator Integration

MatrixCare Home Care integrates with Sandata, the provider selected by the State of Rhode Island Executive Office of Health and Human Services (EOHHS) in order to aggregate EVV data as required by the 21st Century CURES Act. Agencies may utilize the MatrixCare Home Care Mobile solution for EVV needs.

Important! Sandata does not support Multiple Services. Customers should not schedule Multiple Services with Sandata payers.

Note: Rhode Island does not send Tasks to Sandata. Tasks are not sent with this state's integration.

Agencies utilizing the Sandata 3rd Party Integration for Rhode Island will:

- Complete initial setup of important areas of MatrixCare required by Sandata.
- Capture clock in, clock out, and GPS data via caregivers utilizing the MatrixCare Mobile solution, which now includes the offline mobile apps for Android and iOS.
- Create and finalize in MatrixCare and submit those invoices to payers and/or clearinghouses as required by the payers. Sandata is an aggregator but not a claims processor, so billing continues independent from the Sandata integration.
- Client, caregiver, and schedule data will push to Sandata behind the scenes, without further user intervention.

Note: Rhode Island integration also utilizes the enhancements for completing Sandata schedules in the Telephony Call Review form, applying Sandata reason codes to visits, and acknowledging Sandata Visit Exceptions.

If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. The MatrixCare Implementation team will enable the Sandata integration and assist you with configuration.

Billing

MassHealth AFC 837P Extract File

The MassHealth Adult Foster Care program requires that the Ordering Provider and the NPI pass in the 837P in Loop 2420E. The MassHealth 837P billing process allows MassHealth invoices to be finalized in MatrixCare and extracted into an 837P file which contains the required Ordering Physician data in Loop 2420E.

If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. Keep in mind that certain features must be enabled by our database admins prior to any configuration in the user interface.

Scheduling

Telephony Call Review - Filter by Coordinator

In many agencies, scheduling coordinators are responsible for managing the Telephony Call Review screen for their particular roster of clients. The addition of the Coordinator column now allows those coordinators to easily filter on just their specific clients in the Telephony Review screen, providing a quick way to see all their clients.

In order to filter on Coordinator, each **Client > Admission** tab must have the **Coordinator** field populated.

The screenshot displays the MatrixCare software interface for the 'Admission' tab. The top navigation bar includes tabs for Start Page, CaregiverList, Suver, N, Client List, and a specific client record: 17686. Abbey, J SOC: 9/27/2017. The main content area is divided into several sections:

- Client Information:** Client: Abbey, Jay, SOC: 9/27/2017, Status: Active, ID: 17686. There is a checkbox for 'Exclude from Billing'.
- Admission Information:** Office: NextGen Dev of Palm Beach Co, Medical Record Number: (empty), Release Information: No Release On File, AssignBenefits: (empty), and a checkbox for 'Enable Medication Module'.
- Admission Source Information:** Verbal SOC Date: 9/27/2017, Verbal SOC Taken By: Kristin, Source of Admission: Physician, F2F Encounter: 9/27/2017, and Certifying Physician: Dhamaghani, Bennarvaro.
- Team Information:** Case Manager: Wolff, Julie, Supervisor: (empty), and Coordinator: Suver, Nate (highlighted with a red box).
- Primary Diagnosis:** Hip Fracture.

To view the new filter, go to **Scheduling > Telephony** and on the **Call Review** tab scroll to the right and look for the **Coordinator** filter column.

Clicking on the **Coordinator** filter will populate the names of the Coordinators from the **Client**.

Admission tabs for all clients in the date range selected. Choosing a specific Coordinator will filter the screen so that only clients with the selected Coordinator are visible on the form.

Telephony													
Call Review													
Get Calls													
Account:		NextGen_PalmBeach		From Date:		5/20/2020		To Date:		5/21/2020		<input type="checkbox"/> Only Show Missed Visits	
Area	Sch. Client	Sch. Caregiver	Bill Units	Pay Units	Service Cod	Schedule I	Notes	Telepho	Tel.Status	ClientTel.	Coordinator		
ice Area	Actual Client	Actual Caregiver	Actual Bill U	Actual Pay Un	Actual Servic	Arrival Call	Departure	Caregive	Phone Number	AClientTe			
Abbey, Jay		Smith, Irene	2.5 Hourly	2.5 Hourly	RN	3807918		<input checked="" type="checkbox"/>		21141	Suver, Nate		
Abbey, Jay			3 Hourly	3 Hourly	ABORIENT	3807542		<input checked="" type="checkbox"/>		21141	Suver, Nate		
Abbey, Jay		Smith, Irene	2.5 Hourly	2.5 Hourly	RN	3807919		<input checked="" type="checkbox"/>		21141	Suver, Nate		
Abbey, Jay			3 Hourly	3 Hourly	ABORIENT	3807543		<input checked="" type="checkbox"/>		21141	Suver, Nate		
Abbey, Jay			8 Hourly	8 Hourly	HHA	3768395		<input checked="" type="checkbox"/>		21141	Suver, Nate		
Unassigned Calls													
Arrival Call	<input checked="" type="checkbox"/>	Departure Call	<input checked="" type="checkbox"/>	Act.Office	<input checked="" type="checkbox"/>	Act.Office Area	<input checked="" type="checkbox"/>	Actual Client	<input checked="" type="checkbox"/>	Actual Caregiver	<input checked="" type="checkbox"/>	Actual Bill U	Actual Pay Un
	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		Actual Service

Duration Changed Flag Ignored when the Actual Duration is Less than the Scheduled Duration

Telephony Call Review has traditionally flagged schedules where the duration and/or units are different (plus or minus) than originally scheduled. Agencies want this situation flagged because payer authorizations are impacted when a caregiver spends more time than scheduled with a client. However, many agencies are not as concerned when a caregiver spends less time with the client than originally scheduled.

Agencies not concerned with under-utilization can request to enable this feature where a schedule's Duration Changed flag can be ignored when the actual duration of the schedule is less than the originally scheduled duration. This will allow for auto-completion of schedules where the duration is less than scheduled (if no other telephony flags exist), while still flagging schedules with a greater duration than originally scheduled. This feature allows back office users to spend less time on the Telephony Call Review screen approving under-utilized schedules.

Note: For any schedules to auto complete, the setting must be enabled on the Office Telephony tab.

The screenshot shows the 'Telephony' tab in a software interface. The 'Office' is set to 'Deepa_Aspect' and the 'ID' is '634'. The 'Telephony Provider' is 'Stratis'. The 'Telephony Account Settings' section includes fields for Login Name (AspectDev), Password (*****), Account ID (AspectDev), Service Code (HHA), Mileage Code (Expenses), Upload Interval (0), Download Interval (0), Upload Range (0), Log XML Up (unchecked), Log XML Down (unchecked), Tel. Parent Office (Deepa_Aspect), and a dropdown for Tel. Parent Office. The 'Telephony Schedule Match Settings' section includes checkboxes for 'Allow creation of a new schedule if downloaded schedule does not match an existing one' (unchecked), 'Round Call Times when imported into schedules' (checked), 'Round call times to how many minutes' (15), and 'Set telephony-completed schedules directly to schedule status of complete' (checked, highlighted with a red box). The 'Telephony Time Source' is 'Use Call Time'. The 'Automatic Schedule Service Change Behavior' is a dropdown. The 'Telephony Schedule Threshold Settings' section includes fields for Time Threshold before arrival (15), Time Threshold after arrival (15), Time Threshold before departure (15), Time Threshold after departure (10), Time & Attendance: Location Threshold (10.0000), and Time & Attendance: Minimum Accuracy (0.5000). The 'Notification Settings' section includes a 'From' field (Deepa.Aspect@matrixcare.com), a 'To' field (Select any recipients you want to receive emails), a 'Test Notify' button, and checkboxes for 'Missed CheckIn', 'Missed CheckOut', 'Case Manager', 'Caregiver', and 'Deepa.paruchuru@matrixcare.com'. The 'Notification Reset Threshold' is 30.

In this example, the originally scheduled duration of the schedule was 30 minutes.

Start Date: 6/1/2020 01:45 PM Service: HHA

End Date: 6/1/2020 02:15 PM 0.50 Hrs Bill Unit Type: Hourly

Client: Rayer, Harlow Pay Unit Type: Hourly

Admission ID: 19327 Assess Client Status: S

Caregiver: Zimmer, Kelly Search Primary Payer: Big Blue Insurance

Ok Cancel

The caregiver clocked in at 1:42 pm and left a bit early at 2:05 pm, but both clock in and out were within the Telephony Schedule Threshold Settings from the Office Telephony tab.

In an office where this feature has **not** been enabled, the back office user will need to approve the schedule in Telephony Call Review so it moves to C (or T) status.

Sch.Start	Sch.End	Office	Office Area	Sch. Client	Sch. Caregiver	Bill Units	Pay Units	Service Cod	Schedule 1	Notes	Telepho	Tel.Status	ClientTel	Coordinator
6/1/2020 1:45 PM	6/1/2020 2:15 PM	Dee...		Rayer, Harlow	Zimmer, Kelly	0.5 Hourly	0.5 Hourly	HHA	3899098		15514	Duration Changed	33481	
6/1/2020 1:45 PM	6/1/2020 2:00 PM	T Dee...		Rayer, Harlow	Zimmer, Kelly	0.25 Ho...	0.25 Hourly		33207	33209	2402851690		33481	

In an office where this feature has been enabled, this schedule would auto complete and the back office user will not even see this schedule available for approval in Telephony Call Review.

Agencies must request MatrixCare support to turn on this feature in MatrixCare. If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. The MatrixCare Support team can assist you with configuration.

Payroll

Paychex Preview Allocation Payroll Extract

The new Paychex Preview Allocation Payroll Extract feature is now available. This feature significantly differs from the original Paychex Preview extract, which is also offered to HomeCare clients.

The new Paychex Preview Allocation extract includes the following features:

- Earn codes are passed for all items in the extract.
- Payroll adjustments and expenses pass the total pay amount and the earn code.
- Schedules performed on holidays (as defined on the Offices Holidays tab) will pass the earn code of HOL, the hours worked, and the rate, which will include regular pay plus the holiday premium pay.
- Schedules with a Pay Flag other than Hourly (such as Visit, 15 min, or 30 min) will be converted into an hourly rate by dividing the total pay by the total duration of the schedule. This means that all rates passed in the Paychex Preview Allocation extract will be hourly rates, even if the caregiver is paid by the Visit.
- Overtime is passed as the regular rate plus the overtime premium rate and is allocated back to the schedules where the overtime occurred.
- Late schedules (retro pay), if overtime, will allocate back to the original schedule if there was no OT paid in the original week and if all the schedules paid in the previous week remain straight time despite the addition of the new late schedule.

Important Note: *The Paychex Preview Allocation Payroll extract **cannot** be imported to a Paychex Preview software system without the use of a Paychex-provided custom converter.*

In order to use the new Paychex Preview Allocation Payroll extract, MatrixCare Home Care Support must enable your software for this feature. Contact Support Mon-Fri at (561) 447-7111 (9am-7pm EST). You can also e-mail us at hc-support@matrixcare.com.

Reports

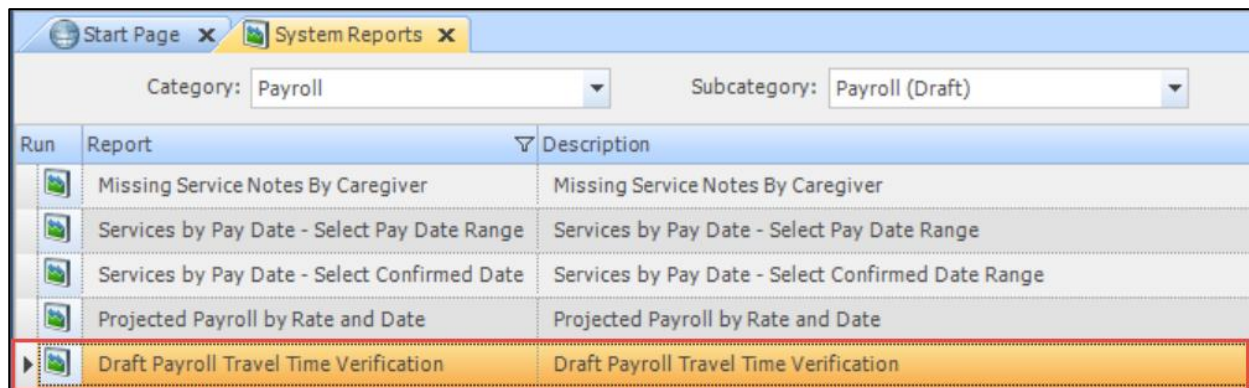
Updated Draft Payroll Travel Time Verification Report

The Draft Payroll Travel Time Verification Report is an existing report in MatrixCare which allows payroll specialists to see all travel time entries in a draft payroll. This report is typically utilized by agencies where caregiver work within certain municipalities requires a higher travel time wage than the standard rate, and this report assists those users in quickly identifying those municipalities (typically entered as Office Areas). Five columns of data have been added to the Draft Payroll Travel Time Verification Report:

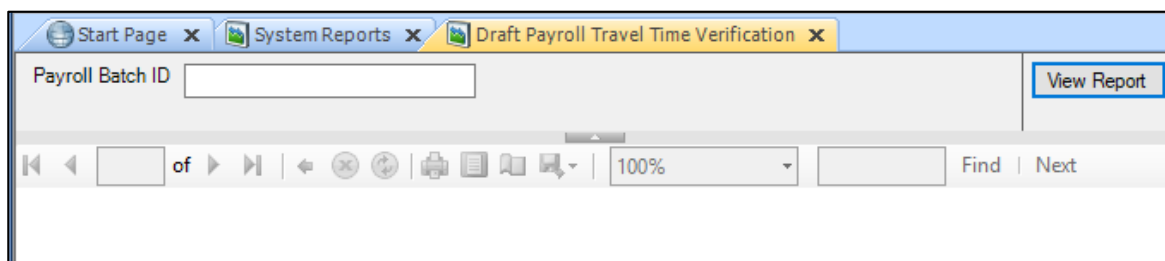
- Caregiver ID
- From Client ID
- From Client Office Area
- To Client ID
- To Client Office Area.

To view the Draft Payroll Travel Time Verification report:

1. From the main menu, click **Navigation, Reports**, then **System Reports**.
2. On the System Reports tab, in the Category list box, select **Payroll** and in the Subcategory list box, select **Payroll (Draft)**.
3. In the System Reports list, scroll down and click **Draft Payroll Travel Time Verification** report.



4. Enter the Draft Payroll Batch ID number to view the travel time for that batch in the report and click **View Report**.



- To export the report to Excel, right-click on the report and select **Export** then **Excel**. Save the file to your desired location and click **Save**.
- Browse to the saved location of the **rptPayrollDraftTravelTimeVerification.xls** file and double click the file to open it.

The screenshot shows the Microsoft Excel interface with the file **rptPayrollDraftTravelTimeVerification - Compatibility Mode** open. The data is organized in a table with the following columns: Pay Date, Caregiver ID, Caregiver Last Name, Caregiver First Name, From Schedule ID, From Client ID, From Client Last Name, From Client First Name, From Client Address1, From Client Address2, From Client City, From Client State Or Province, and From Client Code. The data rows show multiple entries for the date 4/2/2020, with varying caregiver and client information.

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Pay Date	Caregiver ID	Caregiver Last Name	Caregiver First Name	From Schedule ID	From Client ID	From Client Last Name	From Client First Name	From Client Address1	From Client Address2	From Client City	From Client State Or Province	From Client Code
1	4/2/2020	15246	Care	Protector	3879378	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
2	4/2/2020	15246	Care	Protector	3879740	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
3	4/2/2020	15246	Care	Protector	3879741	32988	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL	33065
4	4/2/2020	15246	Care	Protector	3879742	32982	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL	33076
5	4/2/2020	15246	Care	Protector	3879743	33024	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA	22456
6	4/2/2020	15246	Care	Protector	3879744	33353	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX	77710
7	4/2/2020	15246	Care	Protector	3879746	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
8	4/2/2020	15246	Care	Protector	3879747	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401

With the exported Excel file, you can use the Microsoft Excel tools to filter, sort, and sum columns as needed for additional information.

The new columns added are Caregiver ID, From Client ID, To Client ID, From Client Office Area, and To Client Office Area.

The screenshot shows a web application interface with a tab labeled **Draft Payroll Travel Time Verification**. It includes a search bar for **Payroll Batch ID** (4581) and a **View Report** button. Below the search bar is a table with the same data as the Excel export, with columns: Pay Date, Caregiver ID, Caregiver Last Name, Caregiver First Name, From Schedule ID, From Client ID, From Client Last Name, From Client First Name, From Client Address1, From Client Address2, From Client City, and From Client Or Province.

Pay Date	Caregiver ID	Caregiver Last Name	Caregiver First Name	From Schedule ID	From Client ID	From Client Last Name	From Client First Name	From Client Address1	From Client Address2	From Client City	From Client Or Province
4/2/2020	15246	Care	Protector	3879378	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD
4/2/2020	15246	Care	Protector	3879740	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD
4/2/2020	15246	Care	Protector	3879741	32988	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL
4/2/2020	15246	Care	Protector	3879742	32982	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL
4/2/2020	15246	Care	Protector	3879743	33024	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA
4/2/2020	15246	Care	Protector	3879744	33353	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX
4/2/2020	15246	Care	Protector	3879746	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD
4/2/2020	15246	Care	Protector	3879747	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD

Start Page x MSALOKAR's Dashboard x System Reports x Draft Payroll Travel Time Verification x										
Payroll Batch ID 4581										View Rep
1 of 1 Find Next										
From Client Office Area	To Client Schedule ID	To Client ID	Service Date	To Client Last Name	To Client First Name	To Client Address1	To Client Address2	To Client City	To Client State Or Province	To Client Postal Code
	3879379	33025	3/4/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
	3879741	32988	3/5/2020	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL	33065
	3879742	32982	3/5/2020	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL	33076
	3879743	33024	3/5/2020	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA	22456
	3879744	33353	3/5/2020	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX	77710
North west area	3879745	33354	3/5/2020	Last6	Client6	3221 Plum Lake Dr	2nd line	Sayner	WI	54560
	3879747	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
	3879748	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401

Start Page x MSALOKAR's Dashboard x System Reports x Draft Payroll Travel Time Verification x										
Payroll Batch ID 4581										View Report
1 of 1 Find Next										
From Client Office Area	To Client Schedule ID	To Client ID	Service Date	To Client Last Name	To Client First Name	To Client Address1	To Client Address2	To Client City	To Client State Or Province	To Client Postal Code
	3879379	33025	3/4/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
	3879741	32988	3/5/2020	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL	33065
	3879742	32982	3/5/2020	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL	33076
	3879743	33024	3/5/2020	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA	22456
	3879744	33353	3/5/2020	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX	77710
North west area	3879745	33354	3/5/2020	Last6	Client6	3221 Plum Lake Dr	2nd line	Sayner	WI	54560
	3879747	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
	3879748	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401

Start Page x

MSALOKAR's Dashboard x

System Reports x

Draft Payroll Travel Time Verification x

Payroll Batch ID

4581

View Report

1

of 1

Find

Next

Office	To Client Schedule ID	To Client ID	Service Date	To Client Last Name	To Client First Name	To Client Address1	To Client Address2	To Client City	To Client State Or Province	To Client Postal Code	To Client Office Area
	3879379	33025	3/4/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401	
	3879741	32988	3/5/2020	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL	33065	
	3879742	32982	3/5/2020	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL	33076	
	3879743	33024	3/5/2020	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA	22456	
	3879744	33353	3/5/2020	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX	77710	North west area
ea	3879745	33354	3/5/2020	Last6	Client6	3221 Plum Lake Dr	2nd line	Sayner	WI	54560	South east area
	3879747	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401	
	3879748	33025	3/6/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401	

5371 Simple Alt Caregiver Name Badge Report is available on the Caregiver Reports tab

An individual version of the badge report displaying the caregiver's Title in block font has been added to the Caregiver Reports tab. This will make it easier for HR Managers to generate a badge for individual caregivers during the hiring process, as well as issue new updated IDs for individual caregivers.

This name badge report, based on the Avery 5371 labels, populates the first and last name, and the caregiver Title in large block font on the bottom of the name badge.

The screenshot shows a web application window titled 'CaregiverList' with a sub-tab 'Adams, A'. The main menu includes 'Main', 'Scripting', 'Inquiry Notes', 'Infiniti', 'Taxable Area', and 'Se'. Below the menu, there are input fields for 'Last: Adams', 'First: Adela', 'Status: Active', and 'ID: 13312'. A section titled 'Information:' contains several fields: 'Internal ID:', 'Sex: Female', 'Skill Category: HHA', 'Title: CAREGIVER' (highlighted with a red box), 'Territory:', 'Salutation:', 'Marital Status: Married', 'Role: Caregiver/St', 'Spouse Name:', 'Nickname:', 'Race: White', and 'Office Area:'.

To view the Caregiver Name Badge Simple Avery 5371 Alt(Individual) report from the Caregivers tab:

1. From the main menu, click **Navigation, Operations**, then **Caregivers**.
2. On the Caregivers List tab, select a Caregiver and scroll the tabs to the right, select the **Reports** tab.
3. In the Caregivers Reports list, scroll down and click **Caregiver Name Badge Simple Avery 5371 Alt** report.

Caregiver List x Adams, A x
 Interview HCCP VBP HR Payroll Activities Pay Rates Contacts Skill Codes Expirations Training Matching Offices Attachments **Reports**

Select Last: Adams First: Adela Middle: Status: Active ID: 13312 Office: NextGen Dev of Palm Beach C

Run	Report	Description
	Individual Caregiver Checklist and Expirations	Individual Caregiver Checklist and Expirations
	Caregiver Schedule by Date of Service (Individual)	Caregiver Schedule by Date of Service (Individual)
	Caregiver Training Listing (Individual)	Caregiver Training Listing (Individual)
	All Schedules by Date of Service (Individual)	All Schedules by Date of Service (Individual)
	Caregiver Payroll by Date of Service	Caregiver Payroll by Date of Service
	Caregiver Earnings (Individual)	Caregiver Earnings (Individual)
	Caregiver Missing Expired Items Individual	Caregiver Missing Expired Items Individual
	Caregiver Name Badge 5392 (Individual)	Caregiver Name Badge 5392 (Individual)
	Caregiver Name Badge Alt 5392 (Individual)	Caregiver Name Badge Alt 5392 (Individual)
	Caregiver Name Badge Simple 5392 (Individual)	Caregiver Name Badge Simple 5392 (Individual)
	Individual Caregiver Work Refusals	Individual Caregiver Work Refusals
	Caregiver Name Badge Simple Avery 5371 Alt	Caregiver Name Badge Simple Avery 5371 Alt (Individual)
	Responsive Time Sheet (Individual)	Responsive Time Sheet (Individual)

The report parameters appear for you to enter the caregiver criteria.

Caregiver List x Adams, A x Caregiver Name Badge Simple Avery 5371 Alt x

Display Last Name: ☒ True ☐ False ID Cards: 1 Card View Report

Start Position: <Select a Value>

100% Find | Next

4. Select the appropriate parameters for the caregiver's information to appear in the report:
 - **Display Last Name** - Select True to show or False to not show the last name.
 - **ID Cards** - Select how many cards to show. You can show up to 10 ID cards.
 - **Start Position** - Select what the badge starting position is. Options are 1 through 10.
5. Click **View Report**. Information entered in the parameters are now shown in the report.

Caregiver List xAdams, A xCaregiver Name Badge Simple Avery 5371 Alt x

Display Last Name: ☒ True ☐ False

ID Cards: 1 Card

View Report

Start Position: 1

1 of 1


100%

Find | Next

ID: 133125/21/2020

MatrixCare

(561) 447-7111



Adela Adams, CAREGIVER

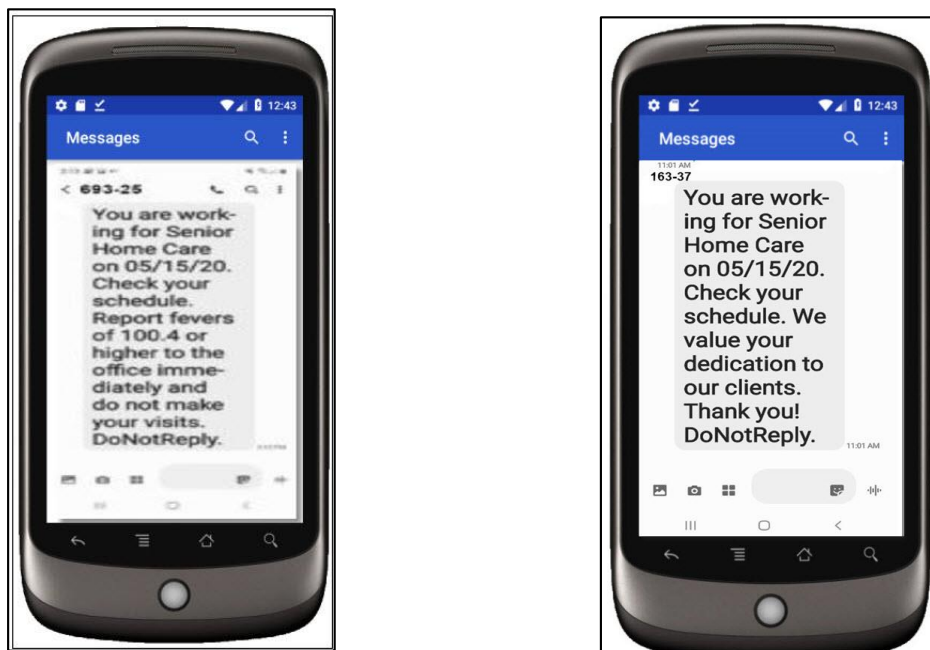
SMS Caregiver Wellness and Work Reminders

During the COVID-19 pandemic, we sent a 2018 R13 service pack to agencies to add additional procedures to their emergency preparedness plans. One of those procedures is to check on the “wellness” of caregivers at least once every 24 hours.

In response, MatrixCare has added a new feature to assist agencies in sending out a nightly reminder text which can be used as both a wellness check and a work reminder. Each office in an agency’s MatrixCare database can insert custom text with instructions that meet each office’s existing COVID-19 emergency policies and procedures. Once this feature is set up, a Wellness and Work Reminder text will be sent nightly to caregivers:

- With an enabled Belongs To office
- With at least one S status schedule the following day
- With the Mobile phone “txt” setting enabled.

After the pandemic, agencies can change the message to alert caregivers of other events.



Benefits of the SMS Caregiver Wellness and Work Reminders include:

- **Wellness Reminders** - provide each office with the ability to customize the message to support your specific COVID-19 policies and procedures during the pandemic. Each office can change the message after the pandemic quickly and easily, as many times as needed.

- **Work Reminders** - provide each office with an automated messaging process that reminds caregivers they are scheduled to work for them. Caregivers with any number of schedules in S status for the following day will receive one text message (or two texts depending on the length of the custom wording) as a Reminder. Caregivers will then check their schedules using the MatrixCare Mobile apps. This will reduce the volume of manual calls placed by the schedulers.
- **Free Service Offering** - this service is offered free of charge from May 15, 2020 through July 15, 2020 to help agencies navigate this difficult period.

Important! In order to use this new feature, you must have your Home Care back office updated to 2018 R13, before installing 2018 R13 SP1.

Office Settings

The Office Settings section on the office Advanced tab must be configured to allow text messages. Ensure that the office is setup to allow caregivers to receive text messages. Verify you have the “Allow Text Messages” flag enabled.

The screenshot displays the MatrixCare software interface with the 'Advanced' tab selected for the office 'NextGen Dev of Palm Beach County' (ID: 443). The 'Office Settings' section is highlighted with a red box, showing the 'Allow Text Messages' checkbox checked. Other settings in this section include 'Office Area Required for Clients' (unchecked), 'Treatment Week Start Day' (Monday), 'Company URL' (http://www.matrixcare.com), and 'Admin Email' (Deepa.paruchuru@matrixcare.com). The 'OASIS Setup' section shows 'Medicare Payer (M0010)' set to MEDICARE, 'Medicaid Payer (M0012)' set to Medicaid 837P GA, 'Branch ID (M0016)' set to N, 'HHA Agency ID' set to HH1999999967, and 'Default Extract File Path' set to an empty field. The 'Mapping Information' section shows 'Mapping Type' set to Google Maps.

Caregiver Record Setup

Ensure that any caregivers who should receive the text message have both their cell phone set up in the caregiver record phone number section and the cell phones have the “txt” flag enabled.

The screenshot shows the 'CaregiverList' window for 'Sapienza, N'. The form is divided into several sections: 'Information', 'Address Information', and 'Phone Numbers'. The 'Information' section includes fields for Internal ID, Sex (Female), Skill Category (RN), Title (Caregiver), Territory, Salutation, Marital Status (Married), Role (Caregiver/St), Spouse Name (Felix), Nickname, Race (White), and Office Area. The 'Address Information' section includes Address 1 (1123 WestBrooke Road), Address 2, City (Boca Raton), State (FL), Postal Code (33434), County (Palm Beach), and Country (United States). The 'Phone Numbers' section is a table with columns: Pri, Type, Phone No, Note, Tel., and Txt. The 'Mobile' phone number (561) 447-7113... is highlighted with a red box, and the 'Tel.' and 'Txt' checkboxes are checked. The 'Home' phone number (561) 504-2222... is also listed.

Pri	Type	Phone No	Note	Tel.	Txt
<input checked="" type="checkbox"/>	Mobile	(561) 447-7113...		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Home	(561) 504-2222...		<input type="checkbox"/>	<input type="checkbox"/>

Activating Caregiver Wellness and Work Reminders

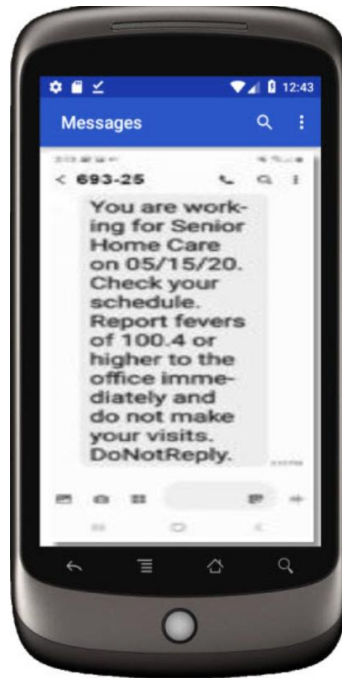
Enabling SMS Caregiver Wellness and Work Reminder must be done on an office by office basis.

1. From the main menu, click **Navigation, Settings** then **Office**.
2. On the **Main** office tab, select your office.
3. Scroll to the right and click the custom **Portal** tab.
4. At the bottom of the tab, select the **Send Caregiver Reminders** check box.
5. In the Caregiver Reminders Message free form text box, click on the down arrow and type in your custom reminder message. The first 200 characters of the custom text will be used in the text message.

Note: The message begins with hard coded text that identifies the office and the date the caregiver is scheduled to work. "You are working for (Office Formal Name) on (Date). Check your schedule." Then the office custom text displays. The message ends with "DoNotReply."

The screenshot shows the 'Portal' settings for 'NextGen Dev of Palm Beach County' (ID: 443). The 'Send Caregiver Reminders' checkbox is checked. The 'Caregiver Reminders Message' text box contains the example text: 'Report a fever of 100.4 or higher to the office immediately and do not make your visits.'

The resulting message sent to the caregiver (including the example Office specific text above) would read:



If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. The MatrixCare Support team can assist you with configuration.

Mobile Updates

Added “Thank you for being a caregiver!” Message on Checkout

MatrixCare realizes the hard work and dedication of your field staff during this difficult time. We have added a note to the mobile checkout process, thanking them for their commitment to serving your clients.

When a caregiver (skilled or non-skilled) has a successful check out, they will now see a Thank you message on the Visit Summary page. This applies to both Android and iOS phone and tablets.

