MatrixCare®

by ResMed

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.

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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.

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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.

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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.

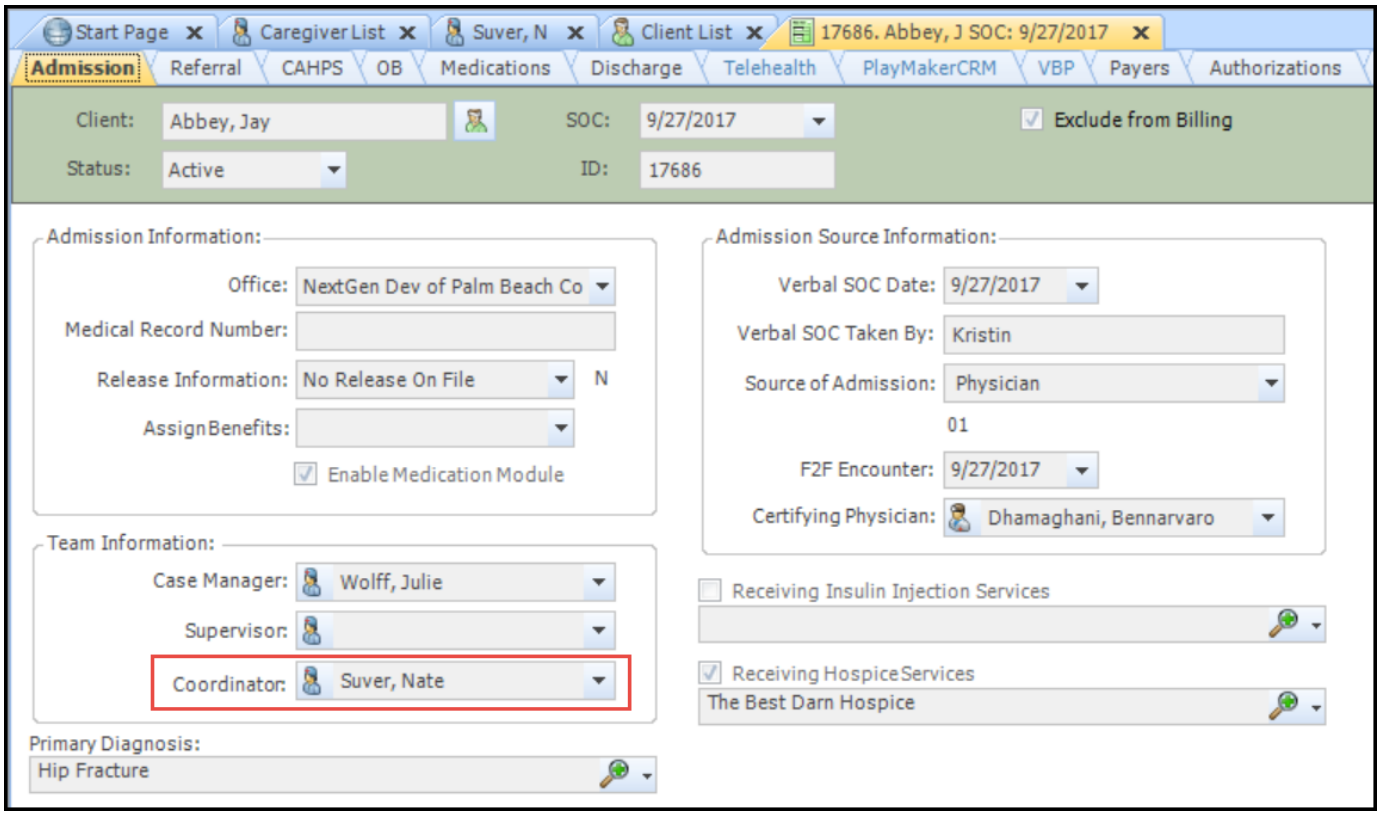
If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. Keep in mind that certain features must be enabled by our database admins prior to any configuration in the user interface.

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.



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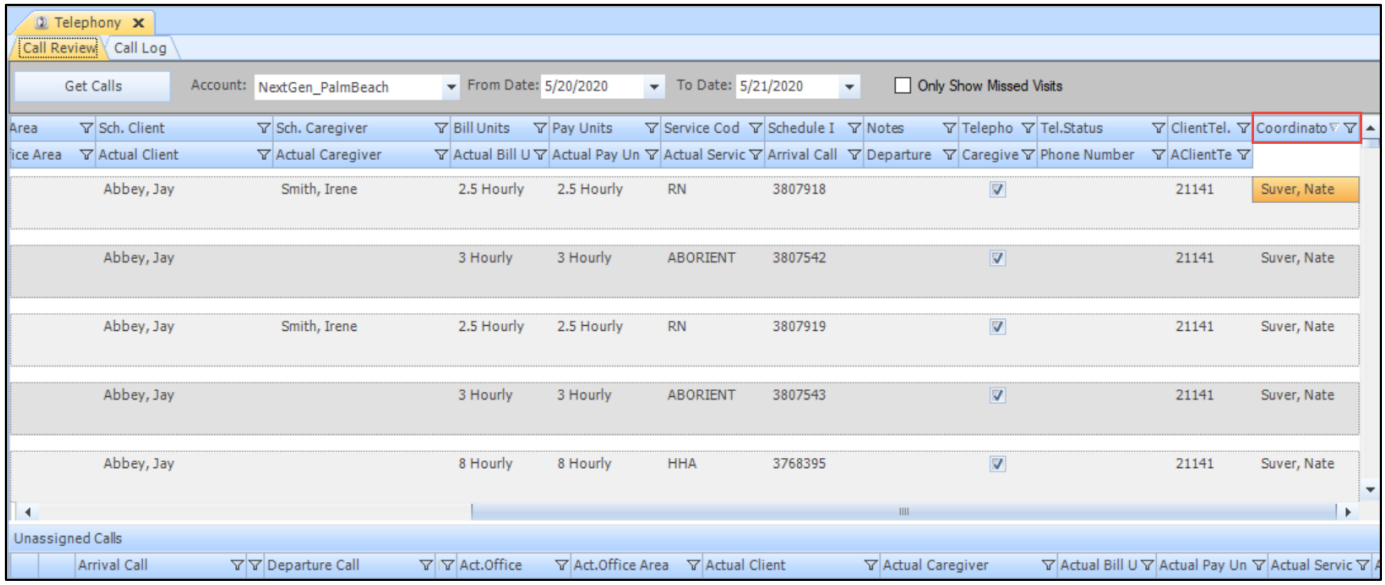
To view the new filter, go to **Scheduling** > **Telephony** and on the **Call Review** tab scroll to the right and look for the **Coordinator** filter column.

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.



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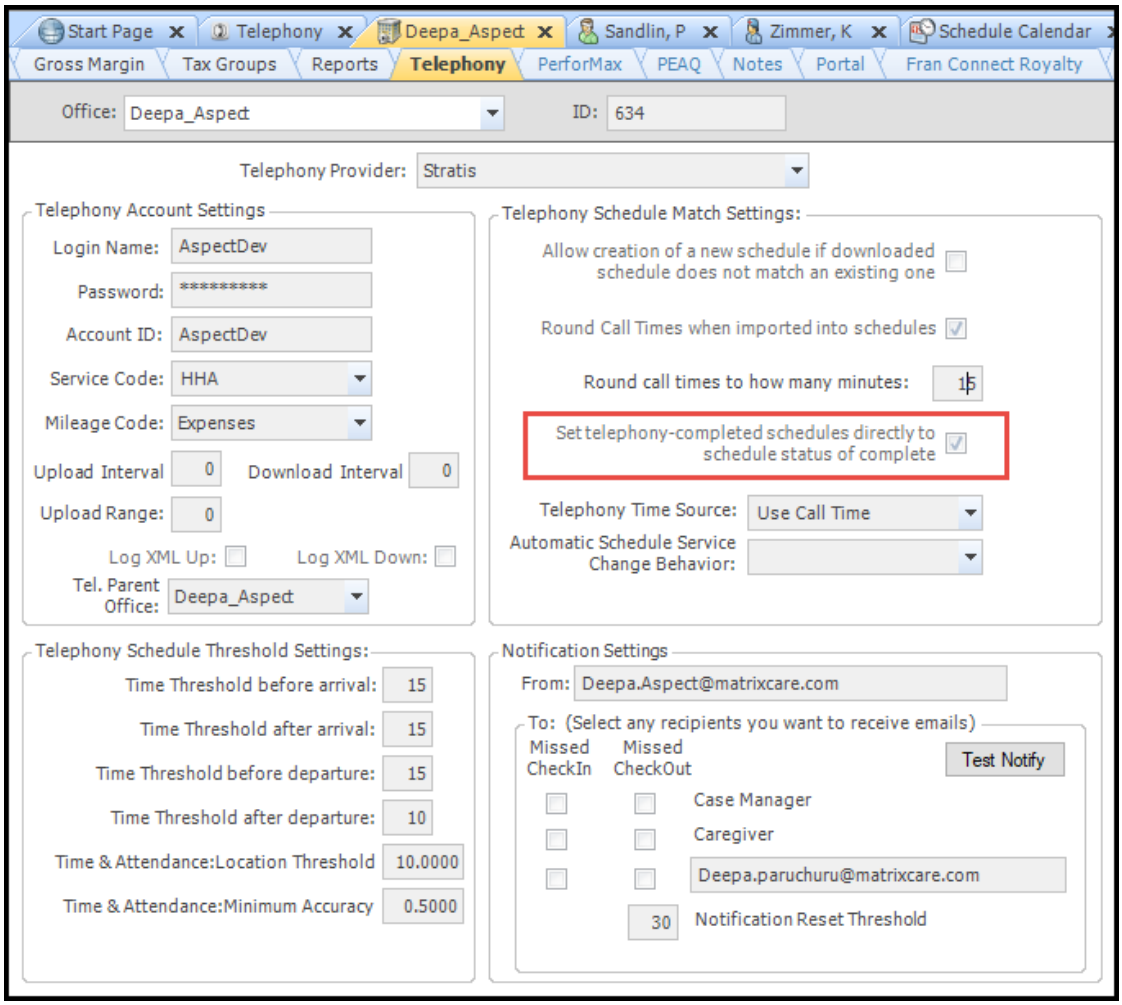
Duration Changed Flag Ignored when the Actual Duration is Less than the Scheduled Duration

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.



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

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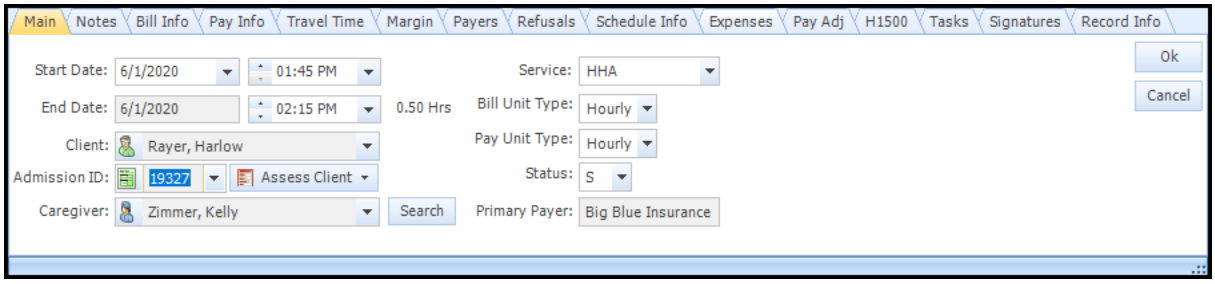
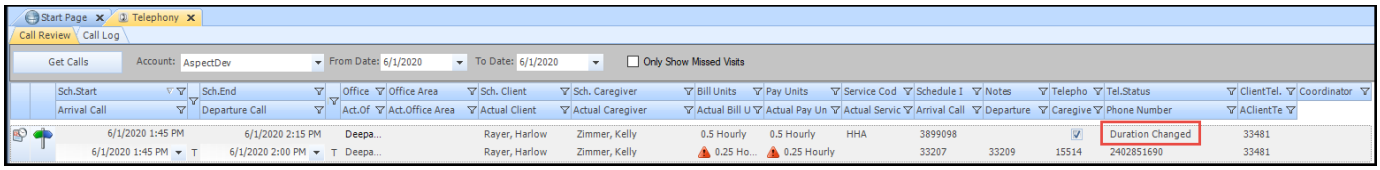


The caregiver clocked in at 1:42 pm and left a bit early at 2:05 pm, but both clock in and out were within the Telephony Schedule Threshold Settings from the Office Telephony tab.

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.



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.

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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.

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Reports

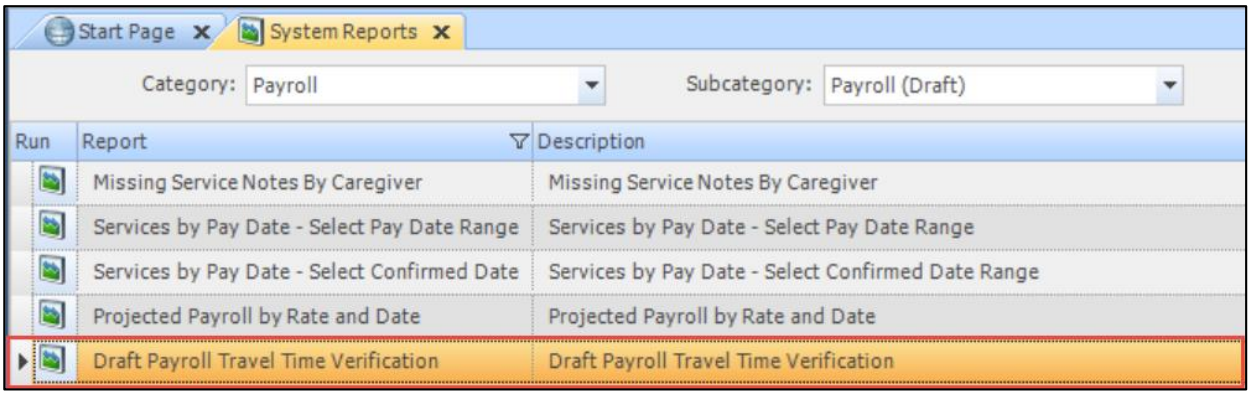
Updated Draft Payroll Travel Time Verification Report

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:

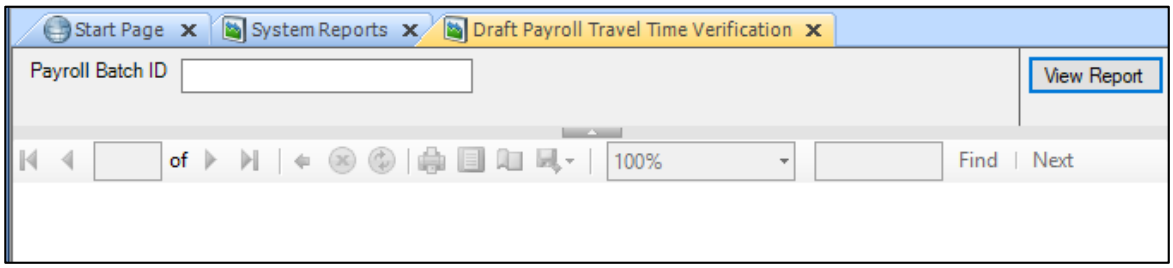
- Caregiver ID
- From Client ID
- From Client Office Area
- To Client ID
- To Client Office Area.

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**.



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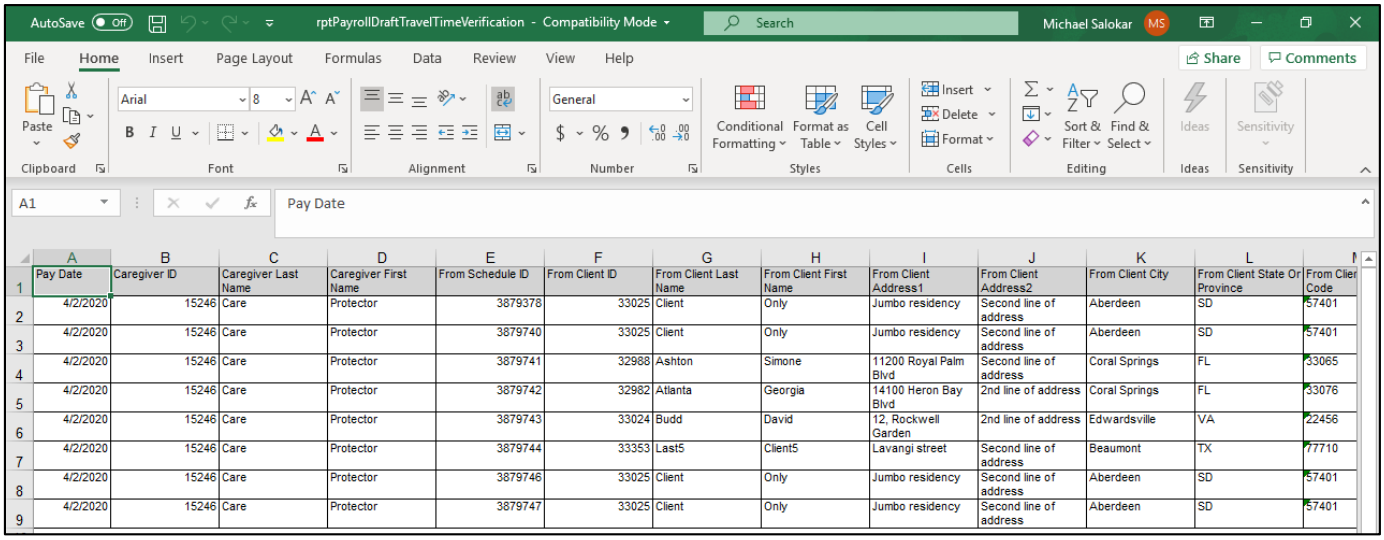
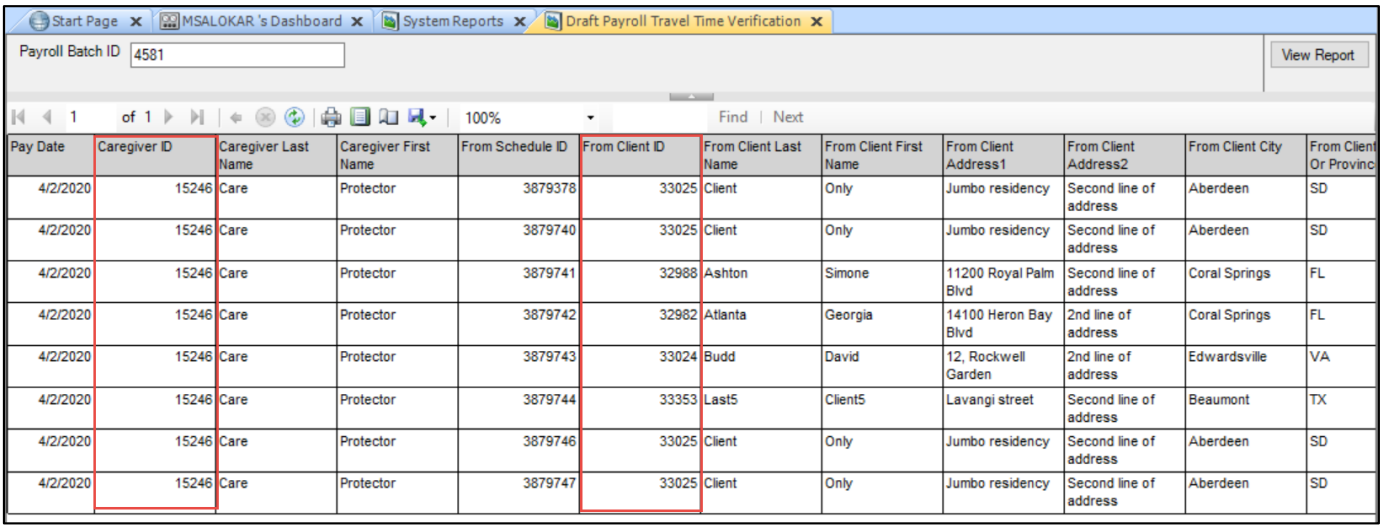
5. To export the report to Excel, right-click on the report and select **Export** then **Excel**. Save the file to your desired location and click **Save**.
6. Browse to the saved location of the **rptPayrollDraftTravelTimeVerification.xls** file and double click the file to open it.



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
4/2/2020	15246	Care	Protector	3879378	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
4/2/2020	15246	Care	Protector	3879740	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
4/2/2020	15246	Care	Protector	3879741	32988	Ashton	Simone	11200 Royal Palm Blvd	Second line of address	Coral Springs	FL	33065
4/2/2020	15246	Care	Protector	3879742	32982	Atlanta	Georgia	14100 Heron Bay Blvd	2nd line of address	Coral Springs	FL	33076
4/2/2020	15246	Care	Protector	3879743	33024	Budd	David	12, Rockwell Garden	2nd line of address	Edwardsville	VA	22456
4/2/2020	15246	Care	Protector	3879744	33353	Last5	Client5	Lavangi street	Second line of address	Beaumont	TX	77710
4/2/2020	15246	Care	Protector	3879746	33025	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	57401
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.



Payroll Batch ID: 4581 — View Report

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 Provinc
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

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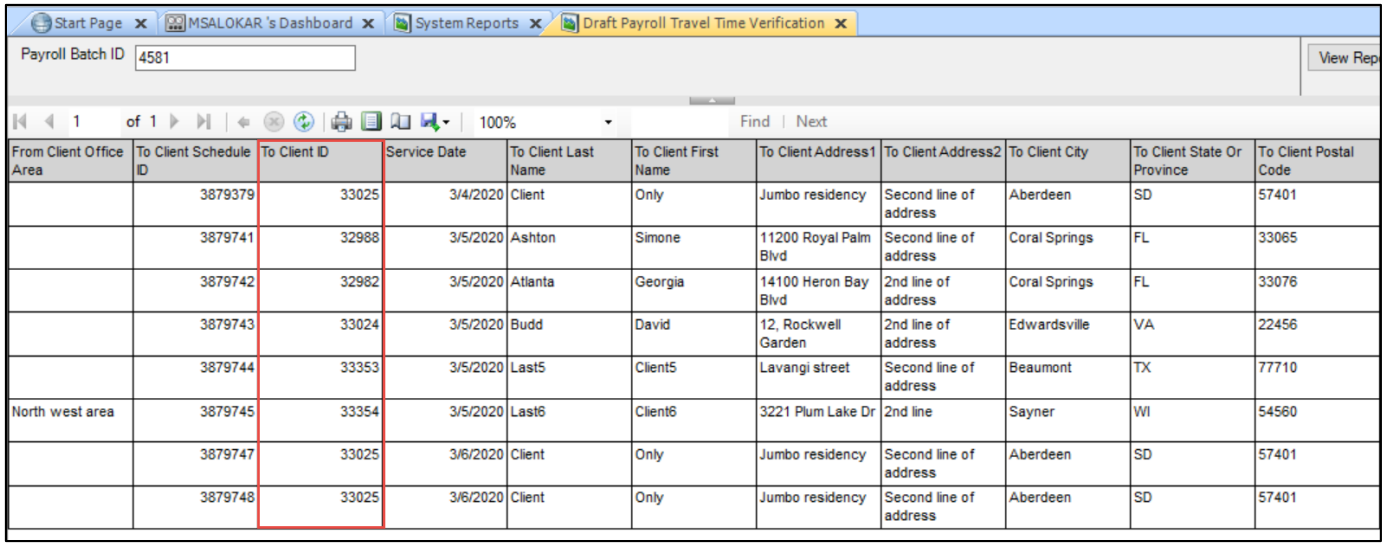
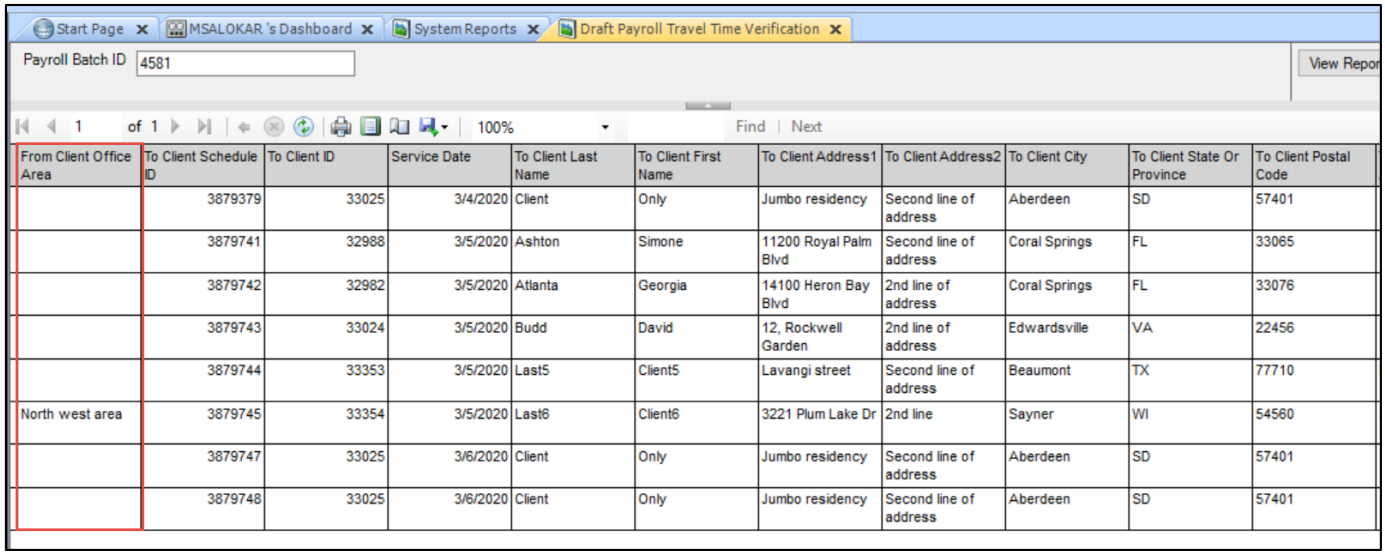
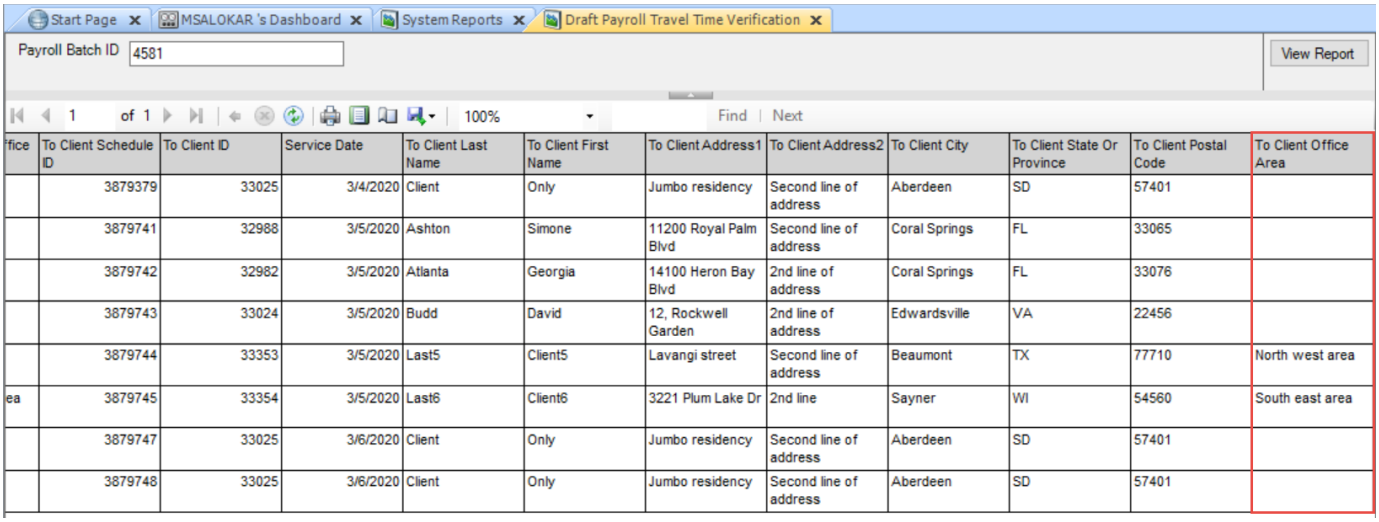


From Client Office Area	To Client Schedule ID	To Client ID	Service Date	To Client Last Name	To Client First Name	To Client Address1	To Client Address2	To Client City	To Client State Or Province	To Client Postal Code
	3879379	33025	3/4/2020	Client	Only	Jumbo residency	Second line of address	Aberdeen	SD	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



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



fice	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	

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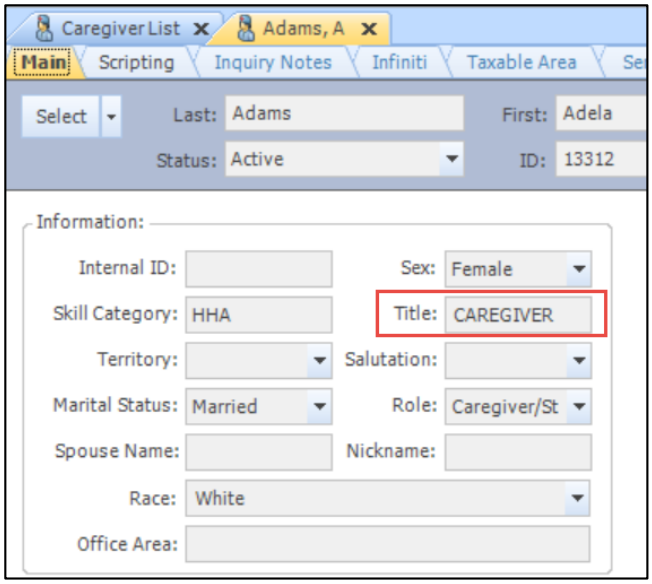
5371 Simple Alt Caregiver Name Badge Report is available on the Caregiver Reports tab

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.



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.

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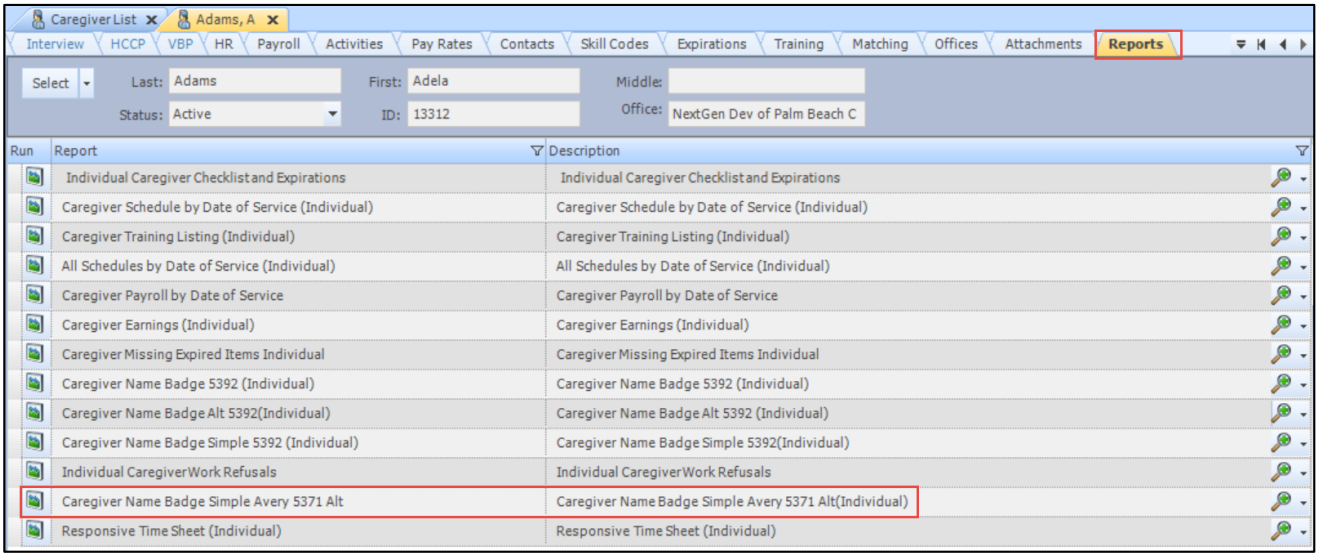
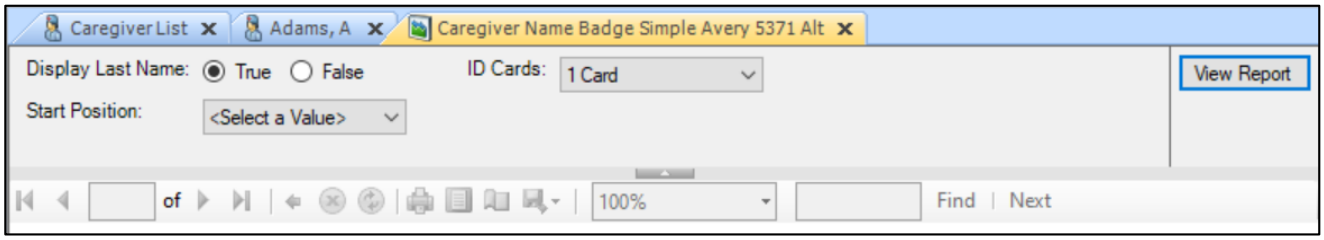


The report parameters appear for you to enter the caregiver criteria.



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.

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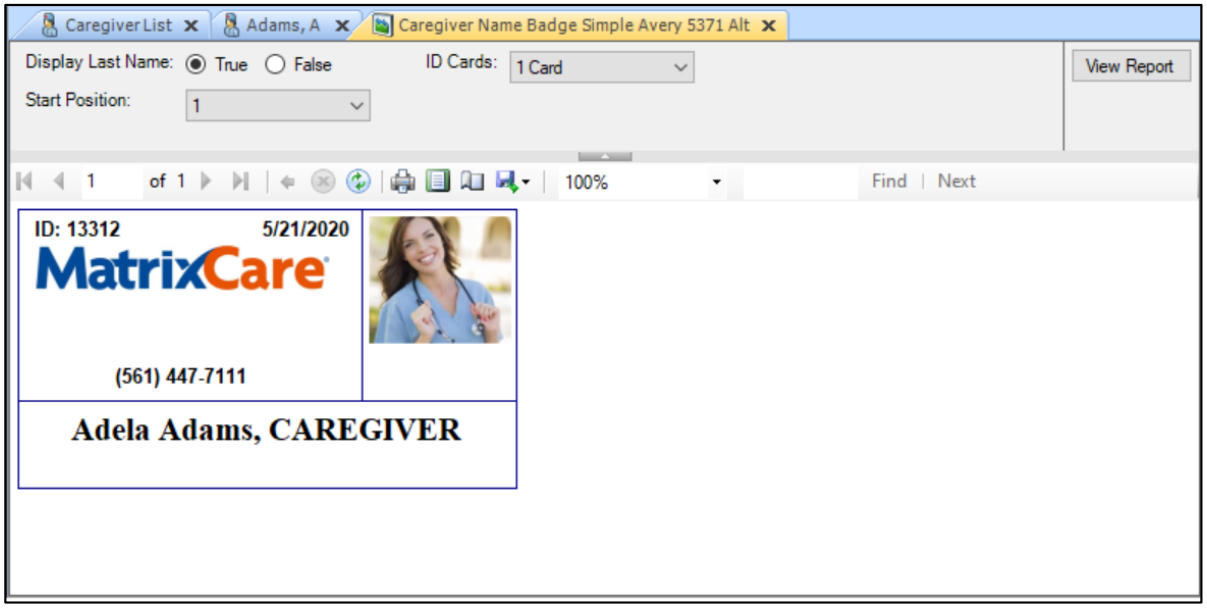

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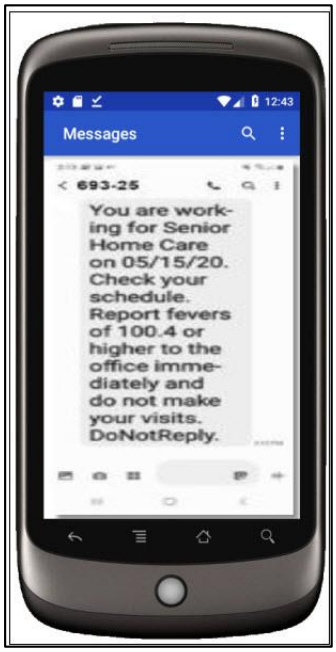
SMS Caregiver Wellness and Work Reminders

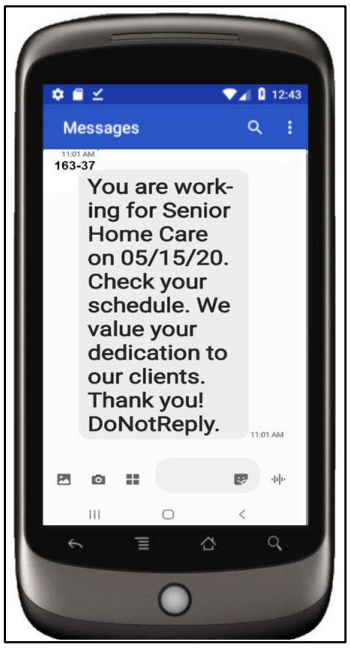
During the COVID-19 pandemic, we sent a 2018 R13 service pack to agencies to add additional procedures to their emergency preparedness plans. One of those procedures is to check on the "wellness" of caregivers at least once every 24 hours.

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.

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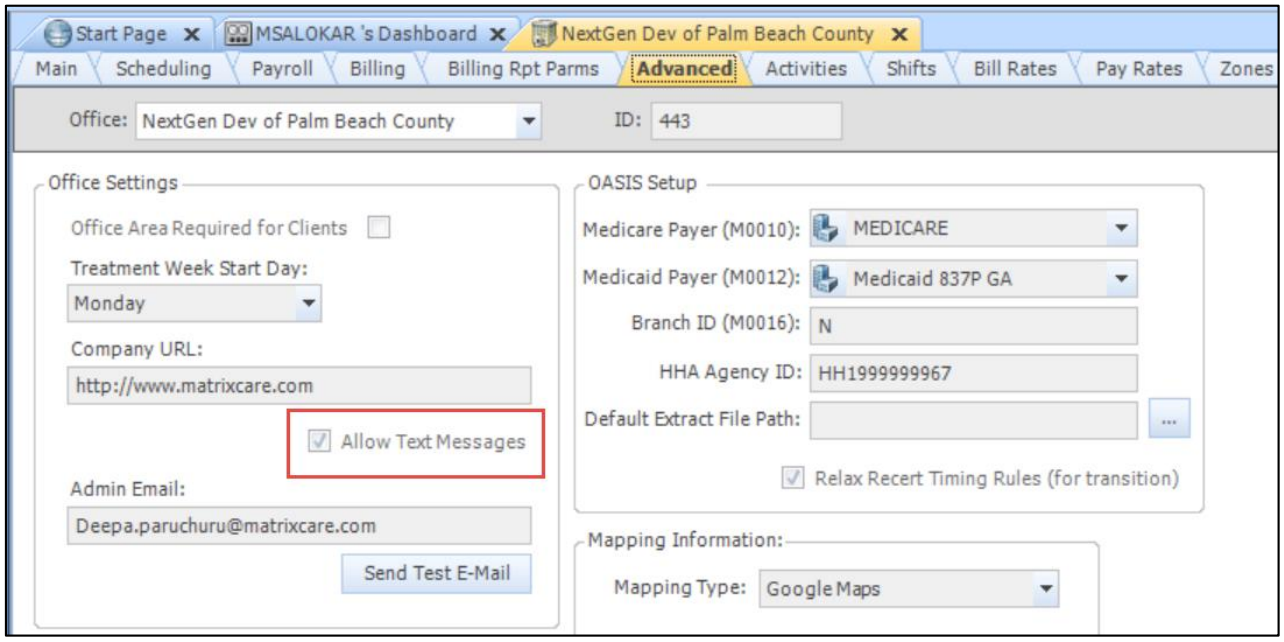
- **Work Reminders** - provide each office with an automated messaging process that reminds caregivers they are scheduled to work for them. Caregivers with any number of schedules in S status for the following day will receive one text message (or two texts depending on the length of the custom wording) 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.



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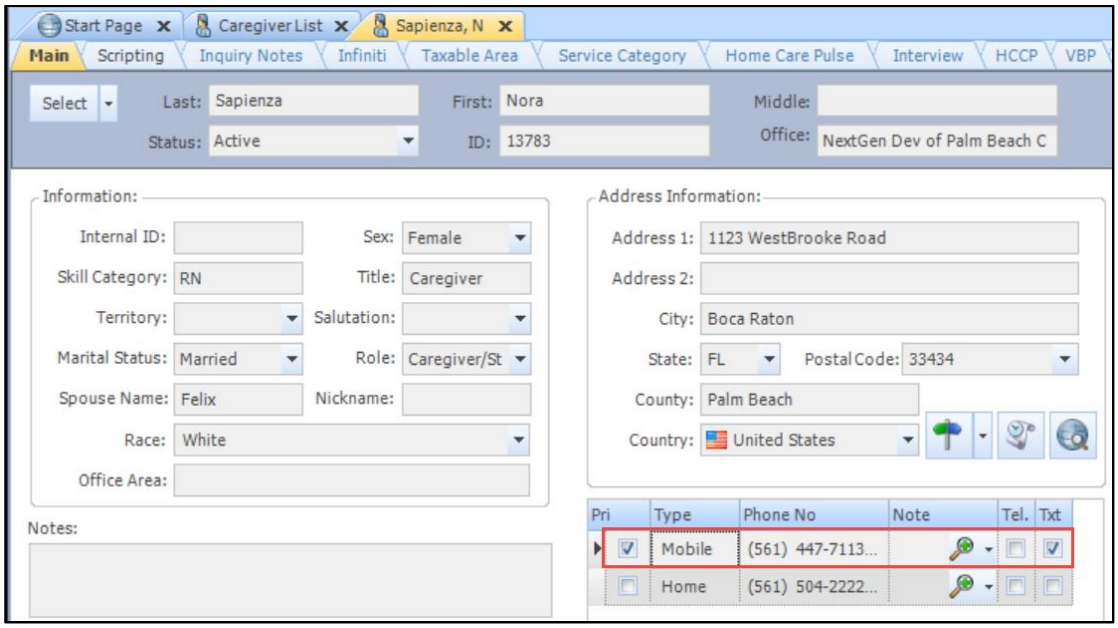
Caregiver Record Setup

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.



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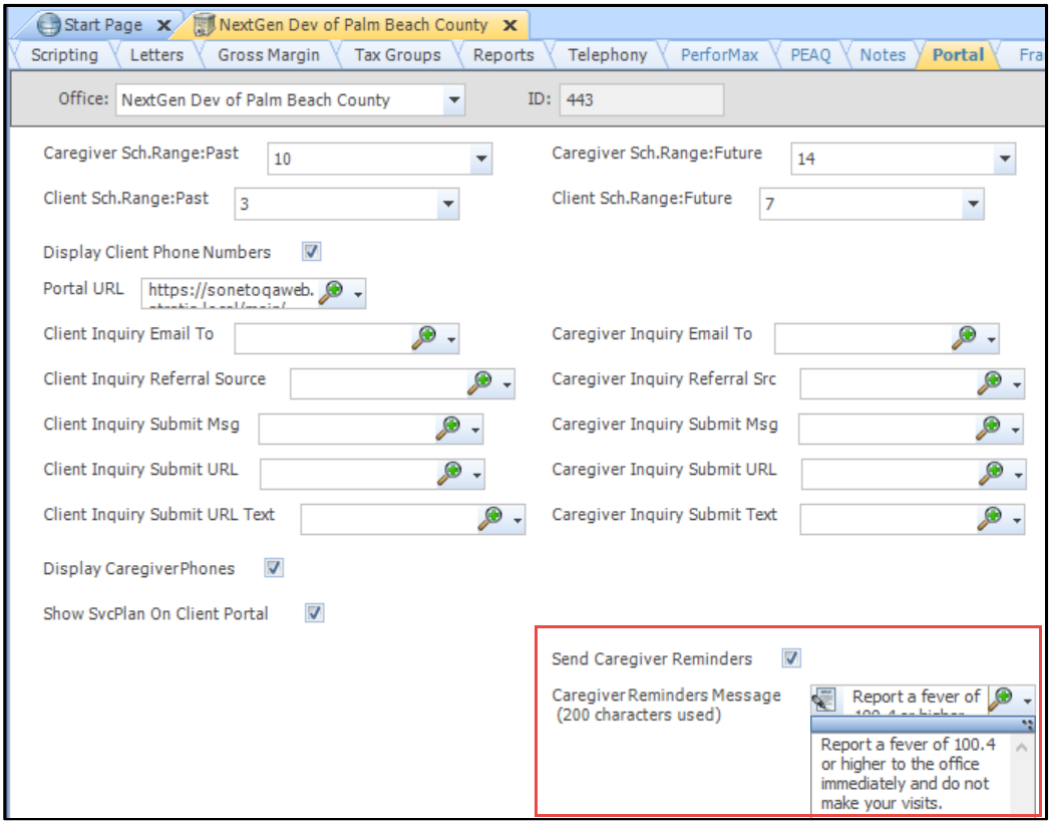
Activating Caregiver Wellness and Work Reminders

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

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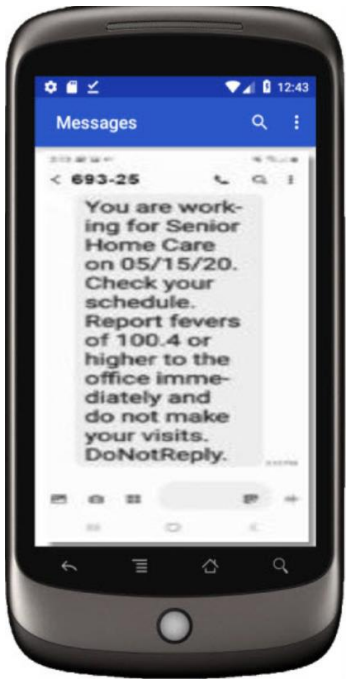

If your agency is interested in utilizing this solution, please contact Support at 561-447-7111. The MatrixCare Support team can assist you with configuration.

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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.

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