MatrixCare®
Integrated Care. Better Outcomes.

MatrixCare Home Care

Back Office for Mobile Implementation Guide

Version: 2018 R6

2017 & 2018 Best in KLAS
for Long-Term Care Software

MatrixCare® Home Care Back Office for Mobile Implementation Guide

This document was written for use with MatrixCare Home Care 2018 R6 (V1.57) or greater.

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General Information for Back Office and Mobile Users

MatrixCare Home Care Mobile is a web app based version of MatrixCare Home Care for caregivers to use at the point of care, to capture Tasks, Mileage, and Expenses performed during their visits and get client signatures. Skilled caregivers can also create Service Plans for their clients. GPS Locating and Check In/Check Out functionality is included. Caregivers can also view Announcement Activities and their outstanding Trainings, and Expirations.

MatrixCare Home Care Mobile is designed for mobile devices and tablets.

- Android System Requirements:
  - Android version 4.4 or higher
  - Latest version of Chrome web app is recommended
- iOS Requirements:
  - iOS version 8.0 or higher
  - Latest version of Safari is recommended
- Windows System Requirements:
  - Latest version of Chrome is recommended
  - Internet Explorer version 11 or Microsoft Edge is recommended

Note: It is recommended that Skilled Mobile users use a device no smaller than an iPad mini for an optimal user experience.

Clearing web app cache
Use the following links for instructions on how to clear the web app cache.
Note: Only use these steps if requested by your support representative.

- **Android** - https://support.google.com/accounts/answer/32050?hl=en

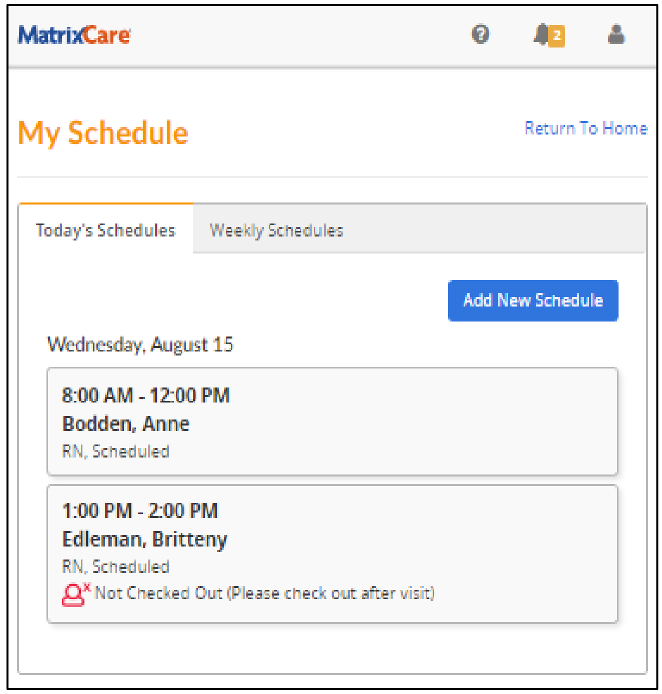
  Note: Check "Cookies and other site data" and "images and files"

- **iOS (safari)** - https://support.apple.com/en-us/HT201265
- **IOS (chrome)** - https://support.google.com/chrome/answer/2392709?co=GENIE.Platform%3DiOS&hl=en

Note: Verify the date and time on your mobile device is correct. If your time is not accurate, check the UTC offset feature on your mobile device. To check that your mobile device shows the correct time zone, go to **Settings**, **General**, **Date & Time** then **Time Zone**.

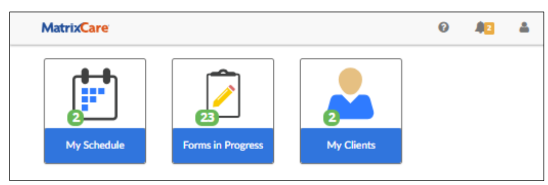
These steps are specific to each web app, and dependent on the mobile operating system and what version you are on.

The following information explains how to use the MatrixCare Home Care Mobile application for an HHA and skilled users. The main features in this application include:

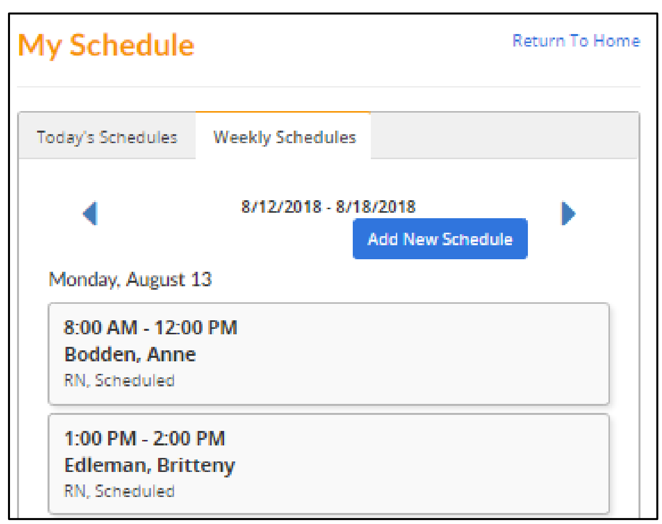


- MatrixCare - Pressing the MatrixCare home logo returns you to the Todays Schedules page.
- **Help** - Pressing the question mark provides a quick tour of main functions on each page of the application.
- **Notifications** - Pressing the bell displays a dropdown menu that allows you to view notifications and activities sent to you by your Home Care Agency office. It also shows the number of notifications that are pending.
- **Account Settings** - Pressing the person displays a dropdown menu that allows you to view your Home Care Agency office information, change your password or digital signature password, and log out of the system.
- **Schedules** - When logging in or pressing the MatrixCare logo, a list of clients you are scheduled to visit today appear. Press on a schedule to view more detail, and to check in and check out. Weekly Schedules display a list of clients that you are scheduled to visit this week, past weeks, or future weeks that are prescheduled.

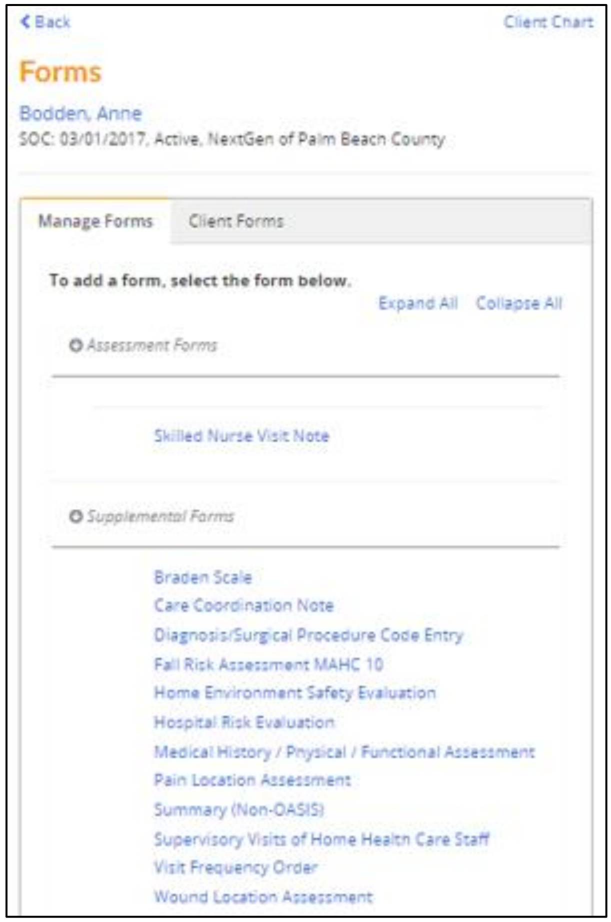
Skilled users will see additional buttons and information such as:



- Buttons on the main page which include; My Schedule, Forms in Progress and My clients.
- **My Schedule** - Pressing the My Schedule button, displays a list of clients you are scheduled to visit today. Press on a schedule to view more detail, and to check in and check out. Weekly Schedules display a list of clients that you are scheduled to visit this week, past weeks, or future weeks that are prescheduled. The green and white number on the button shows the number of schedules for today. Skilled users can add a new schedule to their existing clients.



- **Creating Document Forms without an Associated Schedule** - Pressing the Client Chart button, displays a Forms button. Click the **Forms** button to view a list of all forms that can be created without an associated schedule.

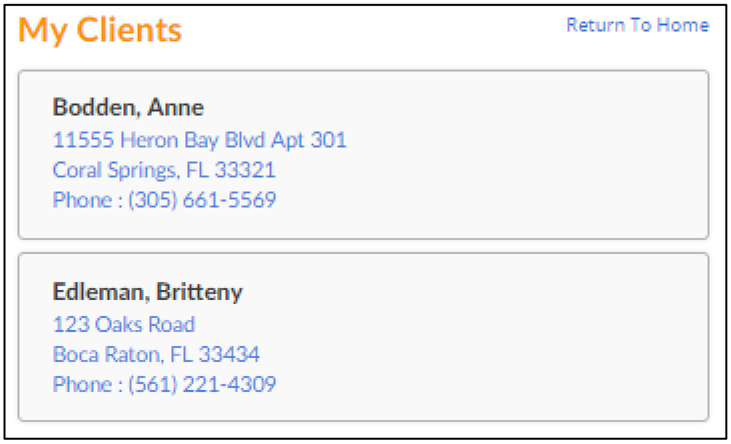


- **Forms in Progress** - Pressing the Forms in Progress button, displays a list of all forms for the user that are in progress. To open a form, press the blue ID link. This allows the skilled user to view and edit their client's forms from the list. The green and white number on the button shows the number of the web-enabled forms in the list.

Forms In Progress

ID	CLIENT	NAME	OFFICE	DATE
8660	Bodden, Anne	SN Daily Visit Note	NextGen of Palm Beach County	3/31/17
9218	Bodden, Anne	SN Daily Visit Note	NextGen of Palm Beach County	5/03/17
9509	Bodden, Anne	Home Environment Safety Evaluation	NextGen of Palm Beach County	6/12/17
9835	Bodden, Anne	Diagnosis/Surgical Procedure Code Entry	NextGen of Palm Beach County	7/07/17
9836	Bodden, Anne	Visit Frequency Order	NextGen of Palm Beach County	7/07/17

- **My Clients** - Pressing the My Clients button, displays a list of clients that have assigned schedules within the past or in the next 60 days. The client information displayed, includes the name, address and phone number. The green and white number on the button shows the number of clients assigned.



Please reference the MatrixCare Home Care Mobile Quick Start Guide for Home Health Aides and the MatrixCare Home Care Mobile Quick Start Guide for Skilled Mobile Users for details on using these features.

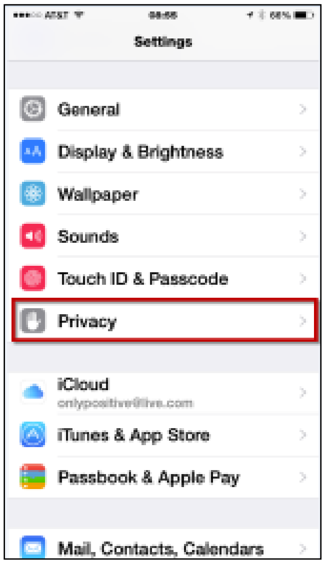
Enabling Location Services on your Phone

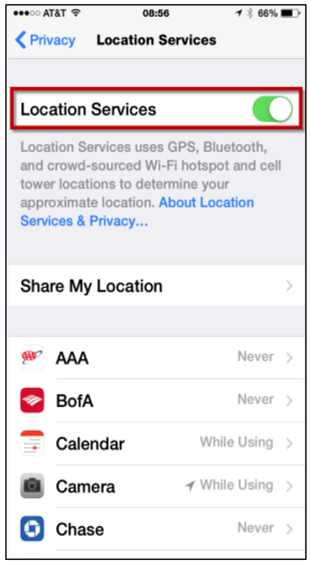
Having your phone set to have location services On, provides the client the ability to find locations quickly and easily. To turn on location services on your phone, follow these instructions.

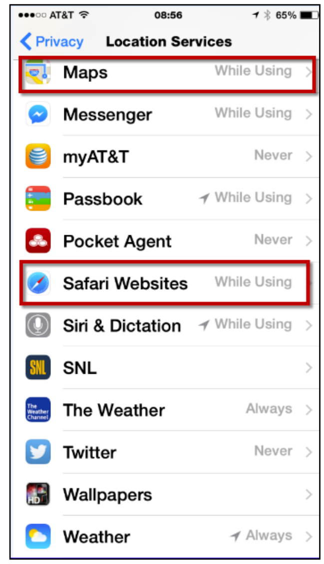
To turn on Location Services for an **Apple iPhone**:

1. On the main screen, press the **Settings** application.
2. Scroll down and press **Privacy**.
3. Check to see if Location Services is set to **On**.
4. If set to On, no action is required. If Location Services is set to Off, proceed to step 5.
5. Press **Location Services** option and slide the switch to the right. The switch will turn green.

Verify that Maps and Web apps have location Services turned on as well.





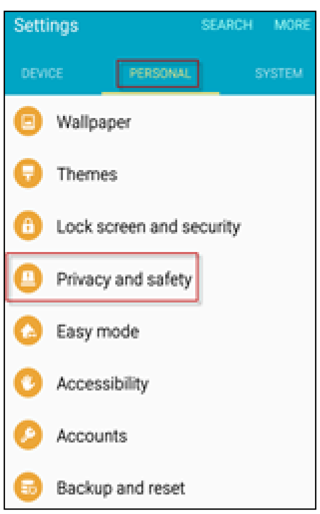


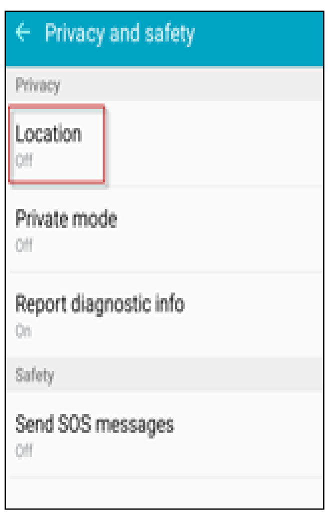
6. When complete, press the main bottom button on the phone and swipe up to close the **Settings** application. The phone will default back to the main screen. Your Location Services is now on.

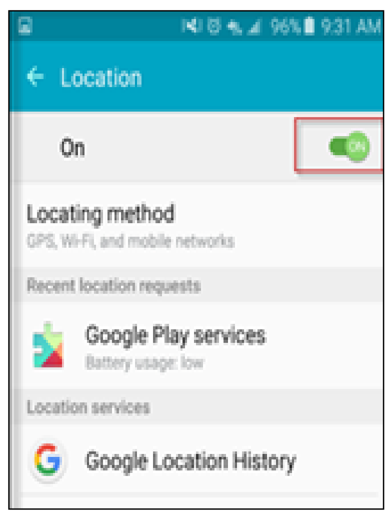
To turn on Location Services for an **Android** phone:

1. On the top of the main screen, press and swipe down and press **Settings**.
2. Scroll down and press **Privacy and Safety**.
3. Check to see if Location is set to **On**. If set to On, no action is required. If it is set to Off, proceed to step 4.
4. Press **Location** option and slide the switch to the right. The switch will turn green.
5. When complete, press the main bottom button on the phone and swipe up to close the **Location** application. The phone will default back to the main screen. Your Location Services is now on.

   When complete, the phone defaults back to the main screen.





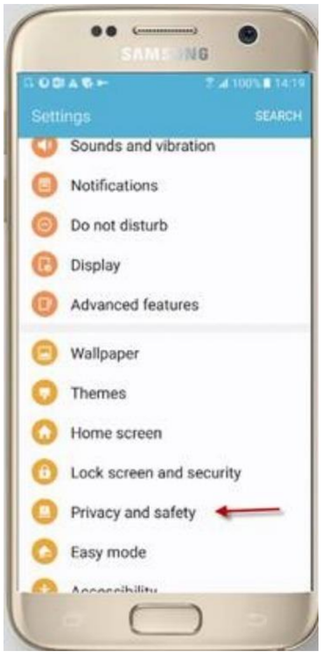


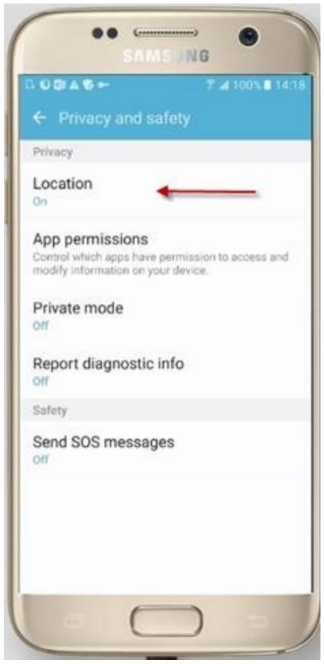
Late model Samsung phones have certain settings that can increase the reliability and accuracy of GPS. Samples shown are for a galaxy S7, but a galaxy s8 will have similar settings.

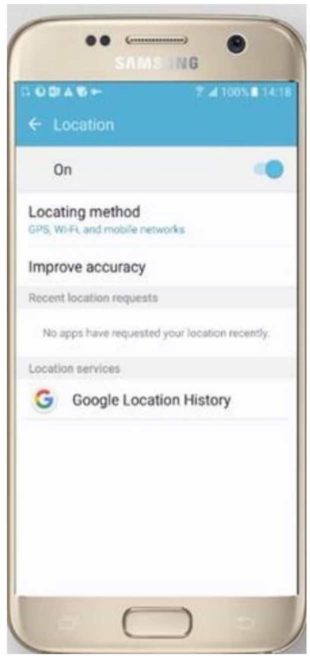
To turn on Location Services for a **Samsung** phone:

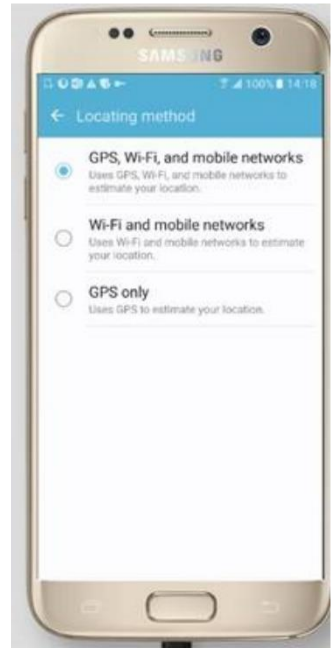
1. On the top of the main screen, press and swipe down and press **Settings** then press **Privacy and safety**.

2. Press **Location** and slide the switch to turn **Locating method** and **Improved accuracy** features on.



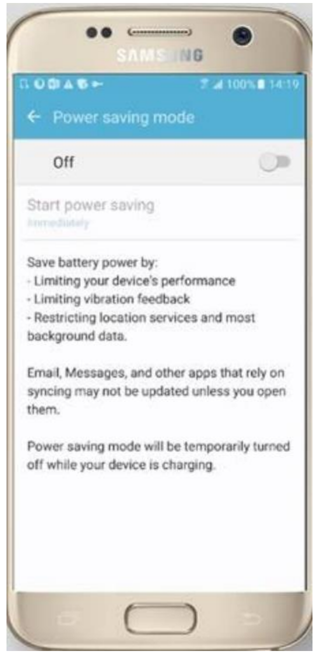


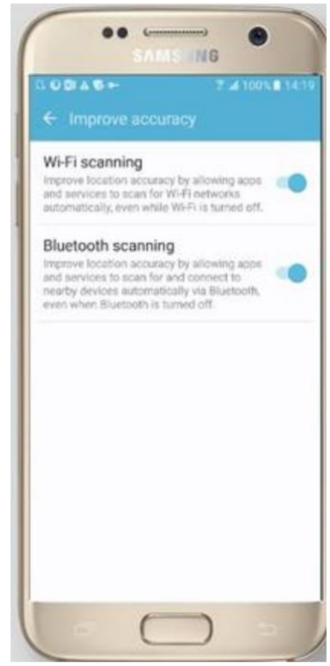




3. Verify that all location settings are turned on.

4. Verify that low power saving mode is not turned on. Go to **Settings**, and search for “**power**”. Turn off **Ultra power saving mode** and **Power saving mode**.





Note: Using the device in either of those modes can severely limit the ability of the GPS feature to work properly.

5. Verify the power settings are set as describe above.

Setting up Auto Rotate on your Phone

Having your phone set to auto rotate provides the client more room to sign the MatrixCare Home Care acceptance form signature panel. To turn on auto rotate on your phone, follow these instructions.

To turn on auto rotate for an **Apple iPhone**:

1. On the main screen, press the horizontal line at the bottom and swipe upwards.
2. On the right side of the top tool bar press the Unlock Rotate button. You can now flip your phone sideways to get a bigger screen size.

   Note: To turn off auto rotate, press the Unlock Rotate button again.
3. When complete, swipe down or let the phone default back to the main screen.

To turn on auto rotate for an **Android** phone:

1. On the top of the main screen, press and swipe down and press **Device Settings**.
2. Scroll down and press **Display**.
3. Press to check **Screen Rotation**. You can now flip your phone sideways to get a bigger screen size.

   Note: To turn off auto rotate, press to uncheck **Screen Rotation** again.
4. When complete, the phone defaults back to the main screen.

Setting up your MatrixCare Mobile Account

Note: This section is applicable for offices that use the Create Users Process.

To Setup your MatrixCare Mobile Account:

1. Open the **Welcome to MatrixCare Mobile** Registration Email that was emailed to you by your Home Care Agency office.
2. Press the link in the email to setup your account. The Verification page opens.

Tip: Most mobile phone carriers allow users to block texts on their phone. Check with your phone carrier to make sure you are not blocking these texts. Some carriers block texts automatically even if you have not requesting them to do so. Check with your carrier concerning any issues you have with sending or receiving text messages.

3. Press **Send Verification** and a text will be sent to your phone.

   Note: This must be the same phone used that received the Registration Invite.

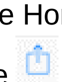
4. On the Verify Your Identity page, enter the 6-digit **Verification Code** that was texted to your phone and press **Confirm**.
5. On the Create Account page, choose your own **Username** and **Password** and **Confirm** your Password. The Password Policy displays at the top of the page for assistance.
6. Press **Create Account**. You have successfully created your account.
7. Press **Log In** and the mobile sign in page opens.
8. To add MatrixCare Home Care to your mobile phone or device home page, refer to the next topic Setting up your MatrixCare Home Care Home Page.

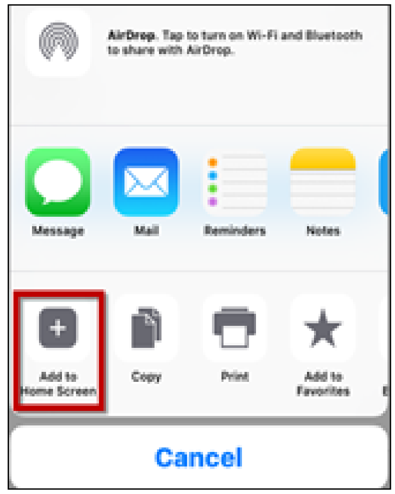
Setting up your MatrixCare Home Care Home Page

On the phone, look for the following buttons or description to add the MatrixCare Mobile application to your Home page.

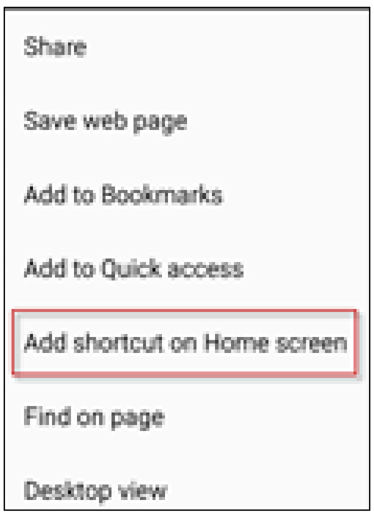
Note: This section is applicable for offices that manually create Mobile User accounts.

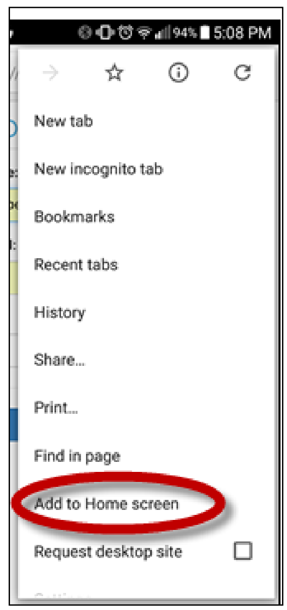
To set up the MatrixCare home page for an **Apple iPhone**:

1. On an Apple iPhone, in the web app main page, browse the MatrixCare Home Care home page (for example; https://app.soneto.net/web/companyname) and press the  button on the bottom of the page.
2. The MatrixCare Mobile application will now be your home page.



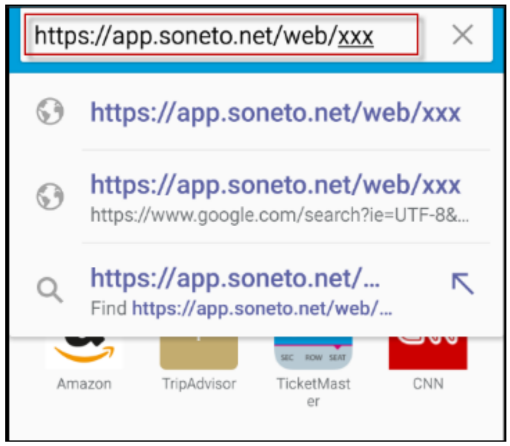
3. Name the home page "**MatrixCare Mobile**". A short cut is added to the Home page.

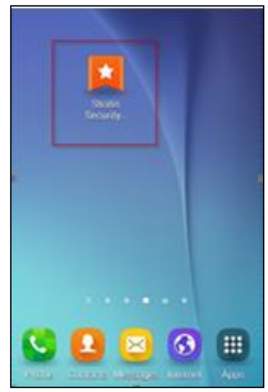




To set up the home page for an **Android** phone:

1. On an Android phone, in the web app main menu, press the **Internet** button.
2. Browse the MatrixCare Home Care home page (for example; https://app.soneto.net/web/companyname).
3. Press **More** on the top right of the page.
4. Press **Add to Home Screen** or select the **Settings** button on the top right of the page and press **Add to Home Screen**.





5. A short cut is added to the Home page.

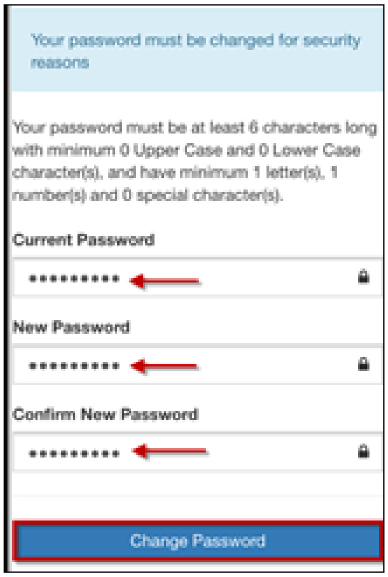
To set up the home page for a **Microsoft** phone:

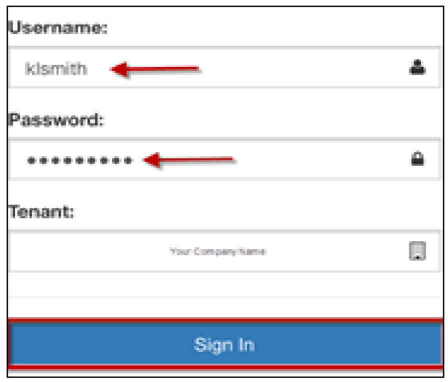
- On a Microsoft phone, in the web app main menu, browse the MatrixCare Home Care home page (for example; https://app.soneto.net/web/companyname) and press **Add to Home screen** description on the bottom of the page. A short cut is added to the Home page.

Signing in to the Mobile Application for the First Time

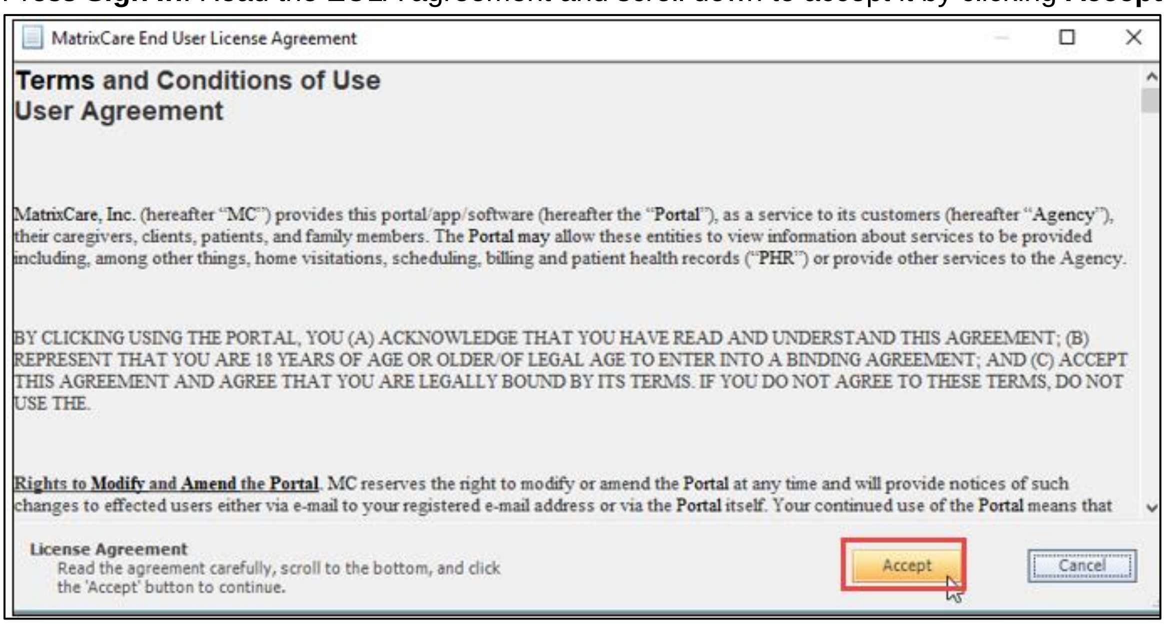
To sign in to your new MatrixCare Mobile Account for the first time:

1. On the Log In page, press **Log In** and the mobile sign in page opens.
2. Enter the **Username** and **Password**. The Password Policy displays at the top of the page for assistance. Press **Change Password**.





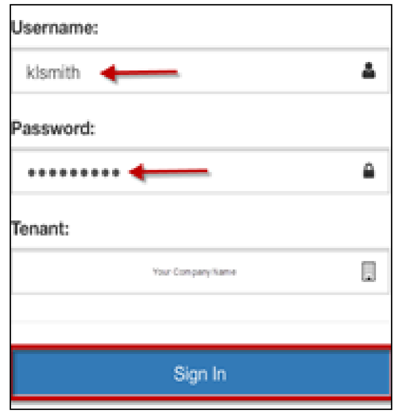
3. Press **Sign In**. Read the EULA agreement and scroll down to accept it by clicking **Accept**.



4. You are now signed in to the MatrixCare Home Care Mobile application.

Signing in to the Mobile Application After the First Time

To sign in to the MatrixCare Home Care Mobile application:



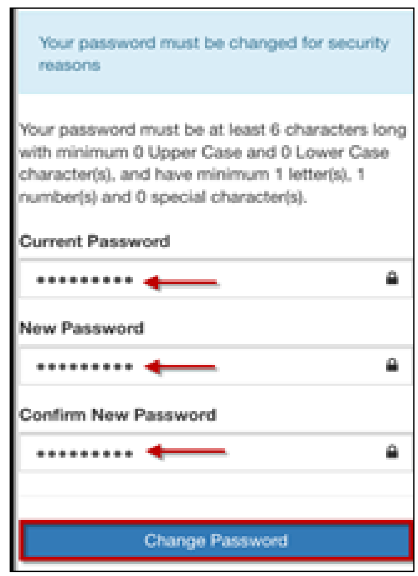
1. On your phone, access the **MatrixCare Home Care URL** that you previously bookmarked.
2. On the Log in page, enter your **Username** and **Password.**

   Note: If you do not know your username or password, contact your Home Care Agency office to have your password reset.

3. The Tenant code is automatically filled in for you. Press **Sign In**.

Changing your Password

To change the default Password:



1. Press the **Account Settings** button on the right of the tool bar.
2. Press **Manage Password**. On the Change Password page, enter your **Current Password**. Enter a **New Password** and **Confirm** the new password.

   Note: Your password must be at least 6 characters long with minimum 1 Upper Case and 0 Lower Case character(s), and have minimum 1 letter(s), 1 number(s) and 1 special character(s).

3. Press **Change Password**.

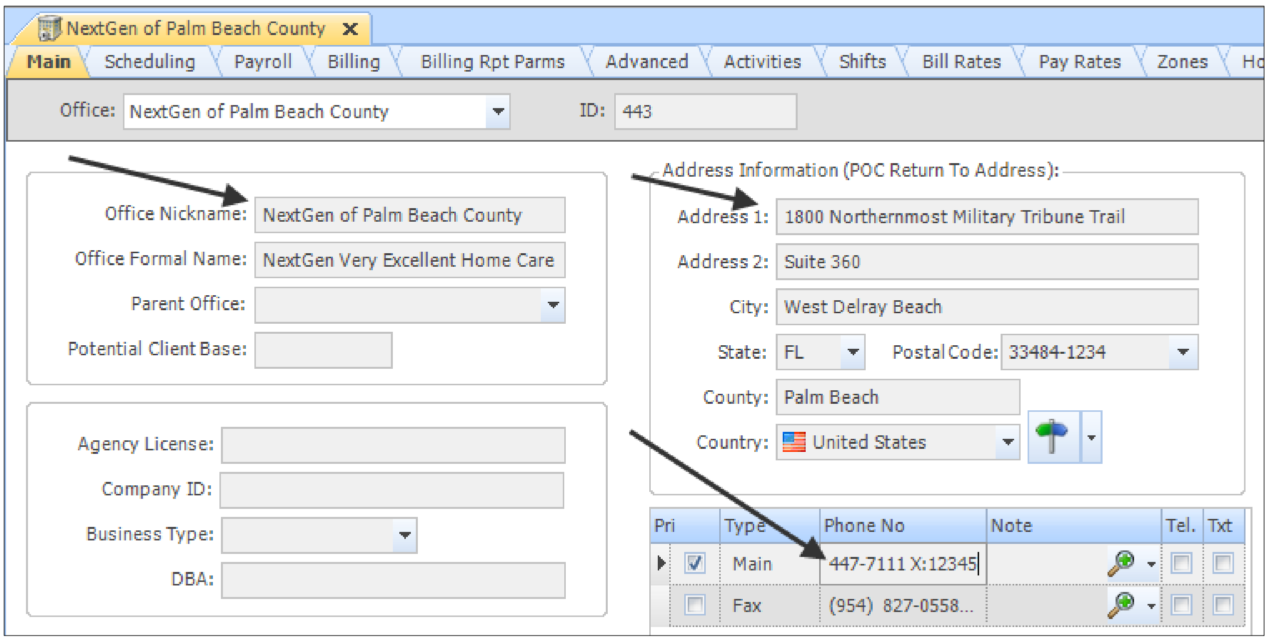
   Note: You can change your password at any time by using the Manage Password option in the Account Settings menu.

MatrixCare Home Care Back Office for Mobile Configuration

Office Record: Office Name, Address and Phone

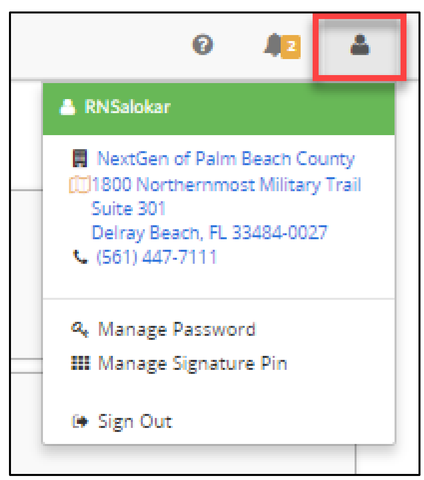
MatrixCare Home Care Mobile displays the Office Nickname, Address, and Primary Phone number in the caregiver's Account Settings.

This information is taken from the Main Tab of the Office record, for the Office that is the caregiver's "Belongs To" office. (The caregiver's "Belongs To" office is the "Belongs To" office on their mapped Caregiver record).



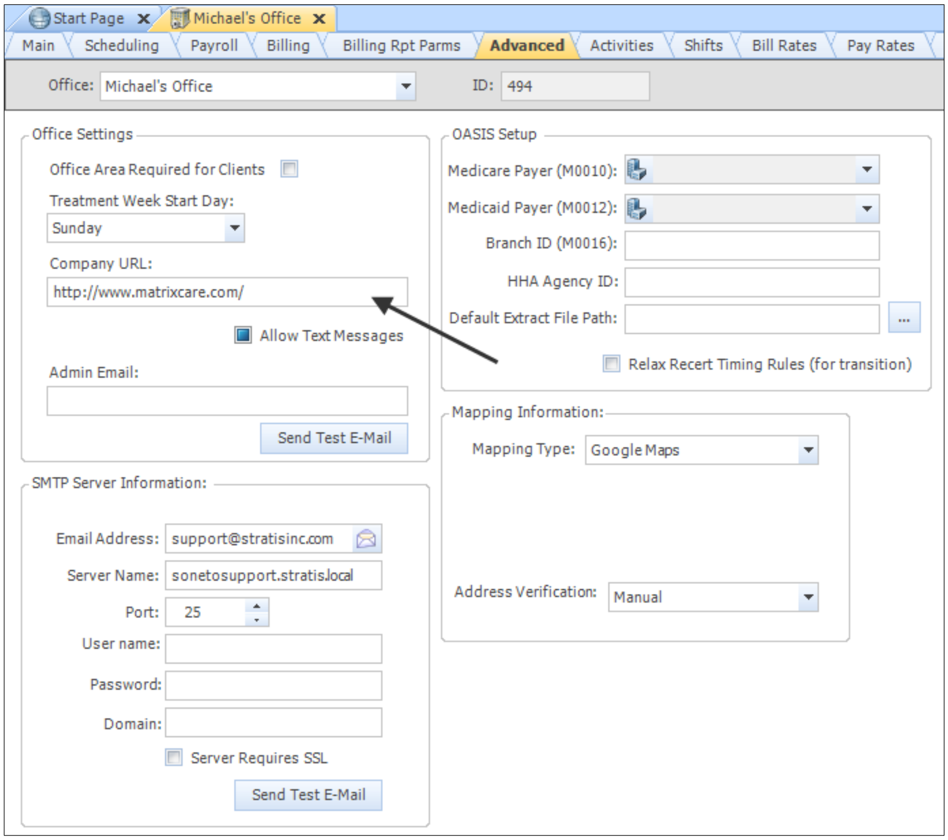
This will display in the caregiver's MatrixCare Home Care Mobile Account Settings, shown below. Pressing the address will launch the phone's mapping provider to get a map to the office address location. The phone is a hyperlink that can be pressed to place a call to the office.

Note: Placing a call would depend on the type of device that is being used.

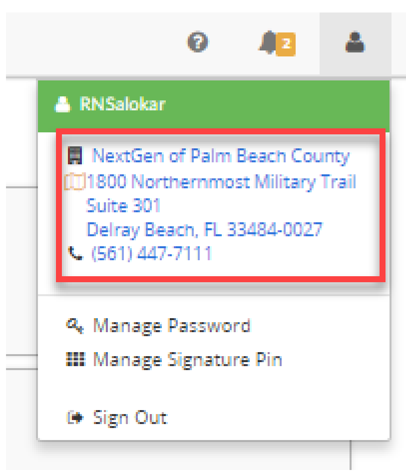


Office Record: Company URL

MatrixCare Home Care Mobile uses the office company URL as a hyperlink on the office nickname. Agencies often put the URL of their website here.



The caregiver can open the company's website from MatrixCare Home Care Mobile, using the hyperlink on the Office name in their Account Settings, shown below.



Group Permissions for Skilled Professional Users

Permissions for the skilled professional users (POC User (Skilled)) now include:

- Admission – Read
- Admission.ChartHistory – Read
- Admission.Physician – Read
- Client.InpatientTracking – Read, Edit and Add (Delete was removed)

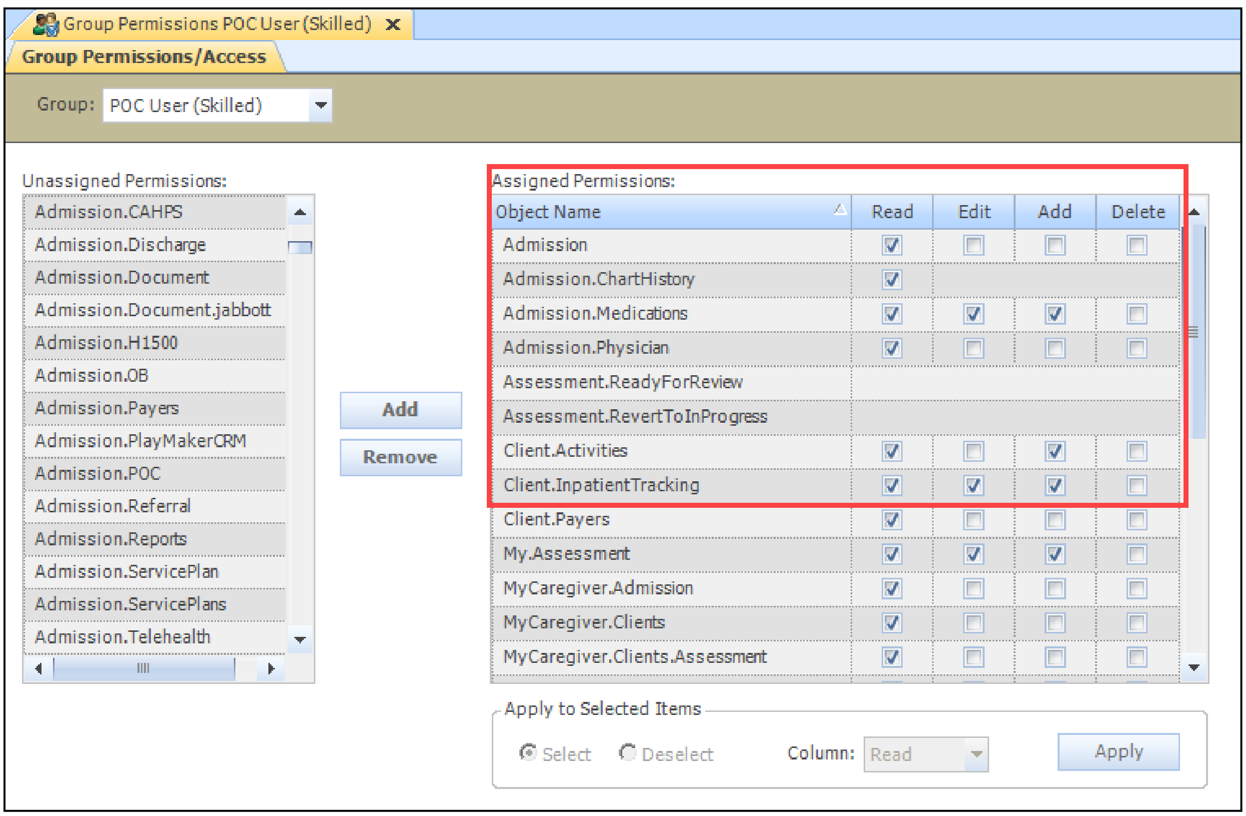
Admission – Read permission allows users to access the Client Chart.

Admission.ChartHistory – Read displays the Medication History link on the Medication details page.

Admission.Physician – Read when adding a medication defaults the admission primary physician in the ordering physician field and displays the client's Admission Physicians when searching for physicians.

Client.InpatientTracking – Read, Edit and Add (Delete was removed) the delete button no longer displays on the Inpatient Tracking records.

Note: Any **Custom Permission Groups** for the Skilled Professional user - must have **Admission – Read** added for the clinician to access the client chart. Additionally, Admission.ChartHistory and Admission.Physician can be added.



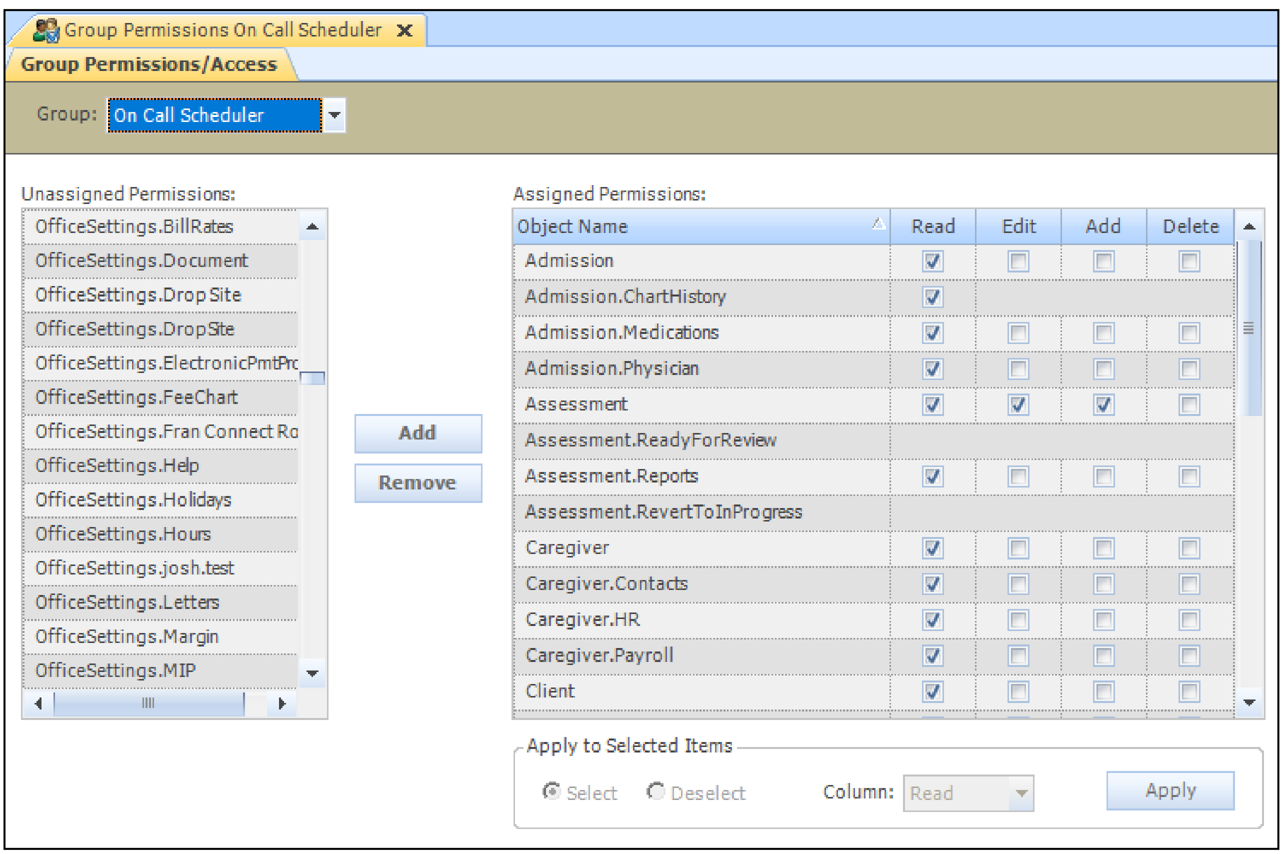
Group Permissions for the On Call Scheduler Users

Permissions for the On Call Scheduler Group now include:

- Admission.ChartHistory – Read
- Admission.Medications – Read
- Assessment – Read, Edit and Add
- Assessment.ReadyForReview
- Assessment.RevertToInProgress
- Assessment.Reports – Read
- My.Assessment – Read, Edit and Add
- Client.Activities – Read and Add
- Client.InpatientTracking – Read, Edit and Add

Important! In the Client Chart, the On Call Scheduler can now; Edit and Add Inpatient Tracking records, create and sign Forms, and view Medications.

Note: Any **Custom Permission Groups** for the On Call Scheduler user may need to be updated with the desired permissions. **Admission – Read** is required to access the client chart.



Enabling the Medication Module

The Agency office must have an active Lexi agreement signed for licensure for the Medication Module to work. All Clients using the new Medication Module are required to have a Lexi license agreement. Please Contact Home Care Support for more information about setting up your licensure for the Medication Module.

Note: Until the licensure process is complete, you cannot enable the Medication Module in the back office, Office Settings>Advanced tab. A message appears informing the office is not licensed.

The Medication Module must be enabled on the **Office Setting**>**Advanced** tab before it can be enabled in the Client Admissions. When enabling the Medication feature in the Office Setting, a warning message will appear informing that the feature cannot be turned off after it is set.

Note: Admission.Medications - Add, Edit permission must be assigned to see the Check Meds button.

On the Active Medications tab you can now tap the new Check Meds button to automatically display drug to drug interactions and dosage check results. When adding a medication, the Drug to Drug interactions check runs and displays the major severity interactions and the dosage check runs and returns the results.

When the feature is enabled for the office:

- All new admissions in the office will have the Medication Module automatically enabled.
- All existing admissions in the office will be available to have the Medication Module enabled on the Admission tab in the Admission Information section.

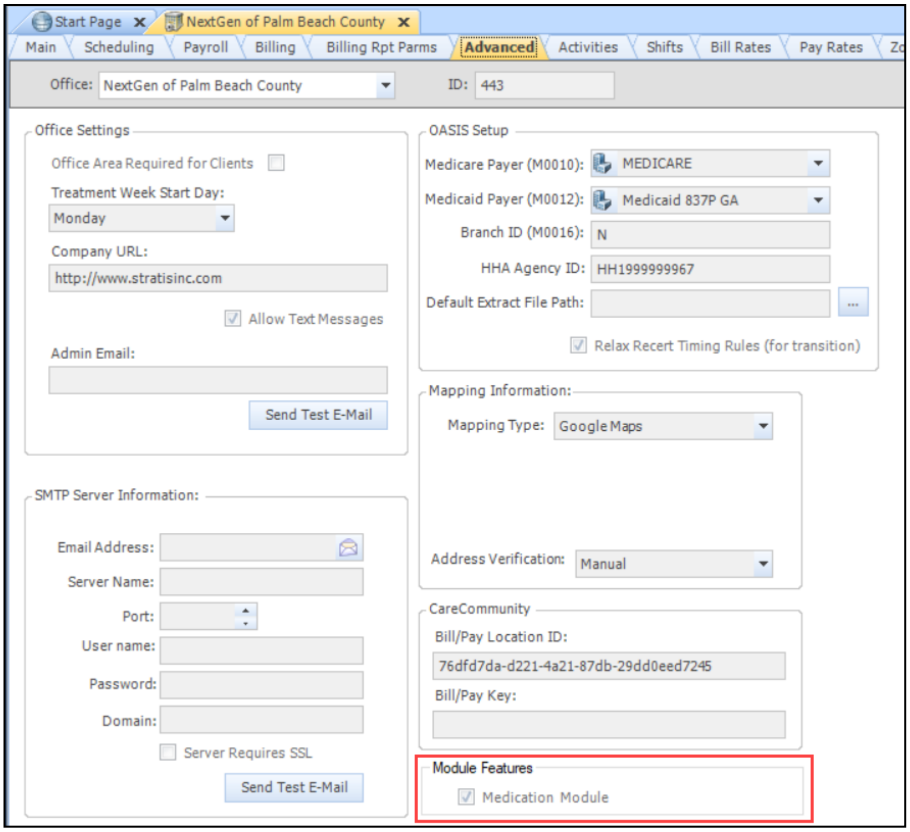
Office Setting: Enabling the Medication Module for all new Admissions

MatrixCare Home Care back office system has a Module Features office setting that when checked will enable the medications module for all new client admissions. These admissions will display a Medications tab in the back office and will not display a Med Profile tab at the Plan of Care level. Mobile users will be able to access medications from the client chart.

Important! Once this feature is enabled, you cannot disable it.

To enable the Medication Module at the Office level:

1. From the main menu, select **Navigation**, **Settings**, then **Office**.
2. Select your desired office from the list box and select the **Advanced** tab.
3. Right-click and select **Modify**. In the Module Features area, check the checkbox for **Medication Module**.



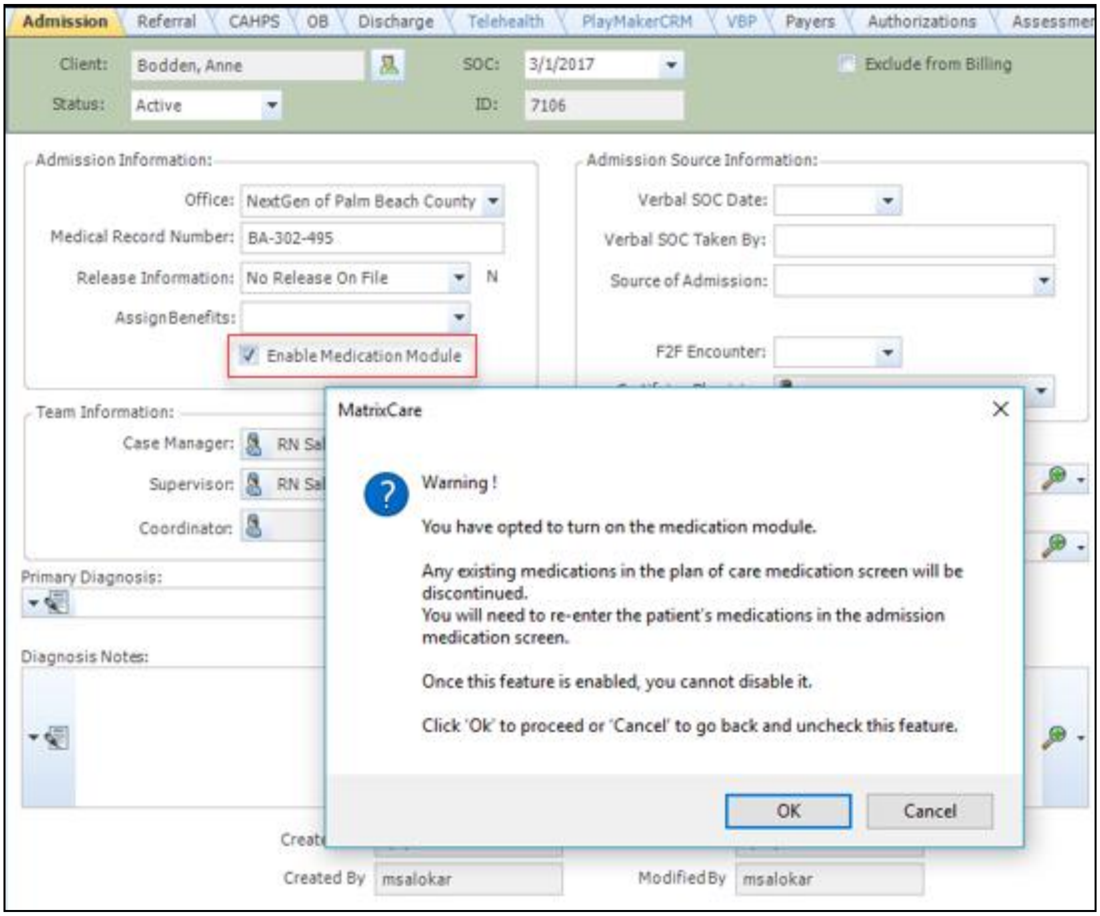
4. Right click and select **Save**. When Medication Module is checked, all new client admissions will now use the new Medication Module.

   Note: To make the setting change available to your current log in session, you must reset your session. From the main menu, select **Tools**, then **Reset Session**.

Enabling the Medication Module on an Existing Admission (after the Office Setting is Enabled)

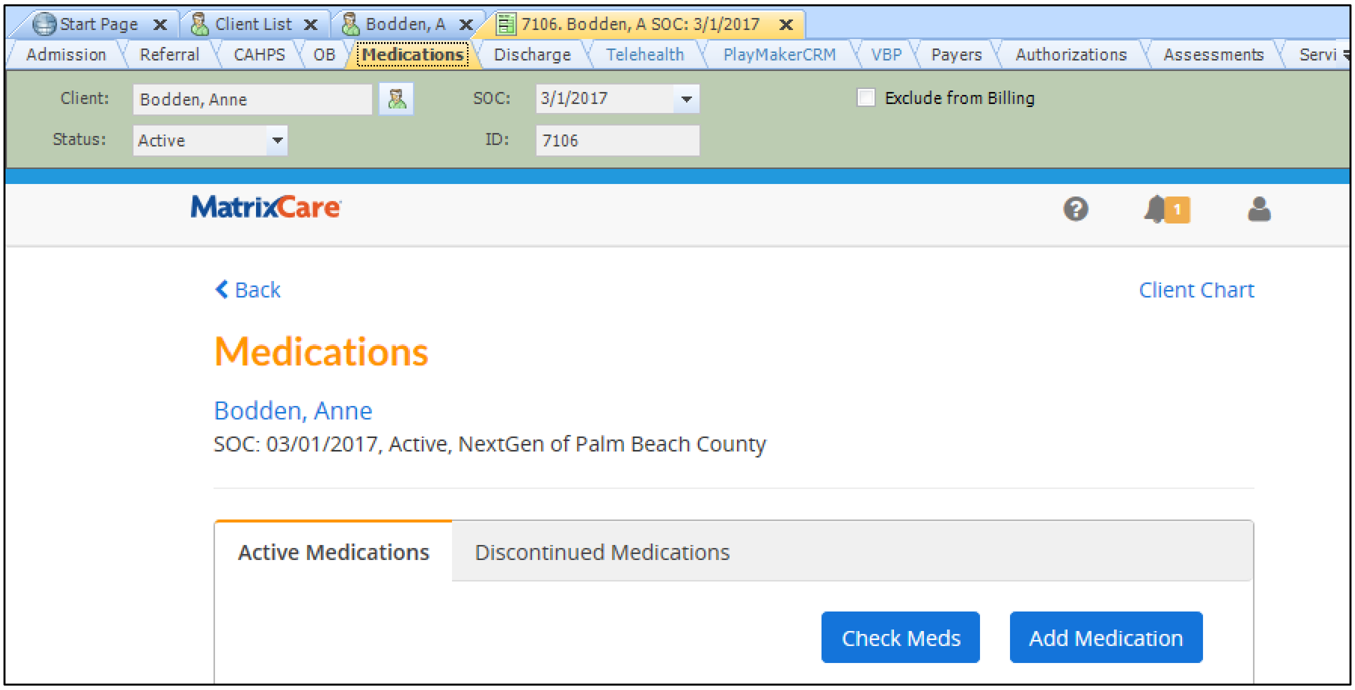
1. On the Admission tab, check the **Enable Medication Module** check box and **Save**. A Warning confirmation message appears that you are opting to turn on the new Medication Module. Any existing Medications in the Plan of Care Medication screen will be discontinued. You will need to re-enter the patient's medications in the Admission Medication screen.

   Important! Once this feature is enabled, you cannot disable it.



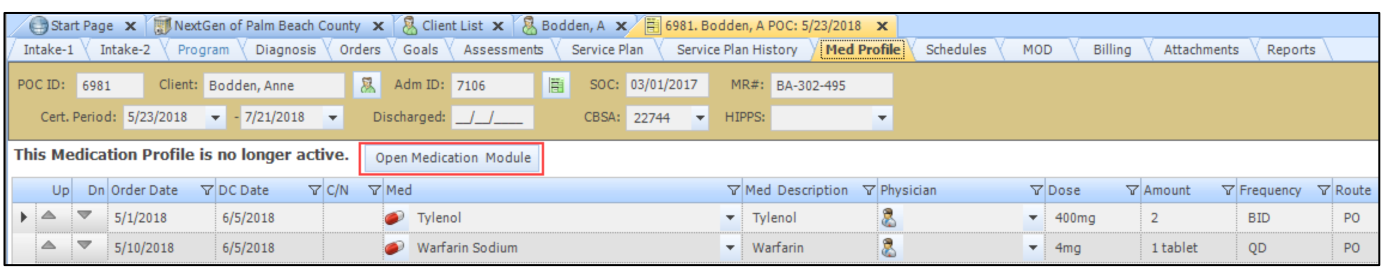
2. Click **OK** to enable the Medication Module. Or click Cancel to go back and uncheck this feature.

3. A new Medications tab appears for you to check or add medications.



4. This is what the Med profile tab will look like after enabling the Medication Module **when medications were previously entered**. A message appears on the top of the grid "This Medication Profile is no longer active". A new button appears to open the new Medication Module. Clicking the **Open Medications Module** button, will open the Admission Medications tab. All existing medications that did not have an already entered DC Date are DCd (Discontinued) with the current date or the order date when the order date is in the future. For the system discontinued medications, the notes field is prepended with a comment.

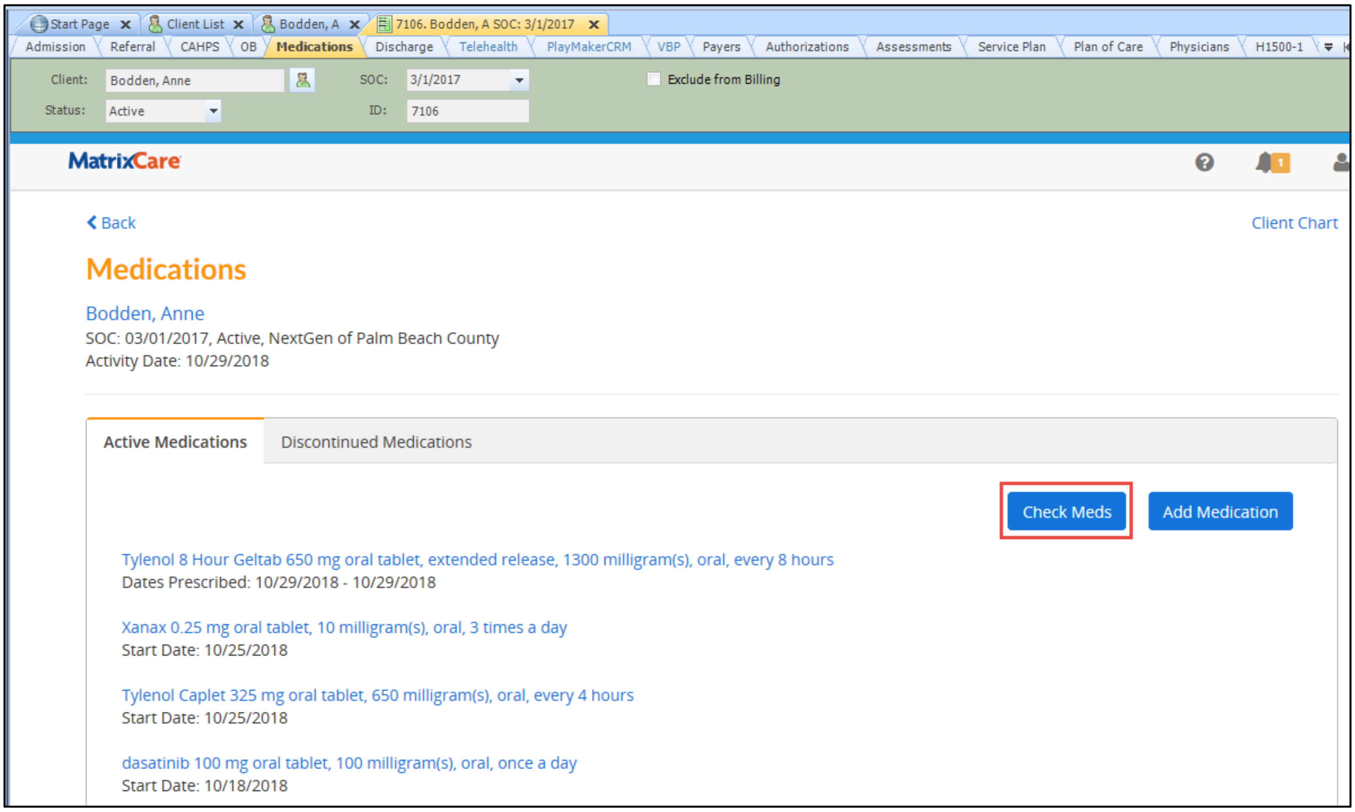
   When the Medication Module is enabled **and there are no previously entered medications** on the Med Profile tab, the tab no longer appears. In addition, the Plan of Care Reports tab no longer displays the Medication Reports. (Medication Profile, Daily Medication Record, Medication Profile-Alt, Weekly Medication Record, Monthly Medication Record, Daily Medication Record-Alt, Medication Profile Grouped by Type)



Checking a Clients Medication UPDATED

To run a client’s medication check:

1. When there is at least one active medication a “Check Meds” button appears. To run medications checks, tap **Check Meds**.



The Medications page, Drug to Drug Interactions and Dosage Checks results will be shown. Use the blue navigation links to go directly to the item you want to view.

Drug to Drug Interactions:

- Displays the medication names that interact with each other, Interaction Type, Severity and details.
- Interactions are displayed in severity order (Major, Moderate and Minor).
- If there are no Drug to Drug Interactions, then a message displays: “No drug interactions found”.

Dosage Checks:

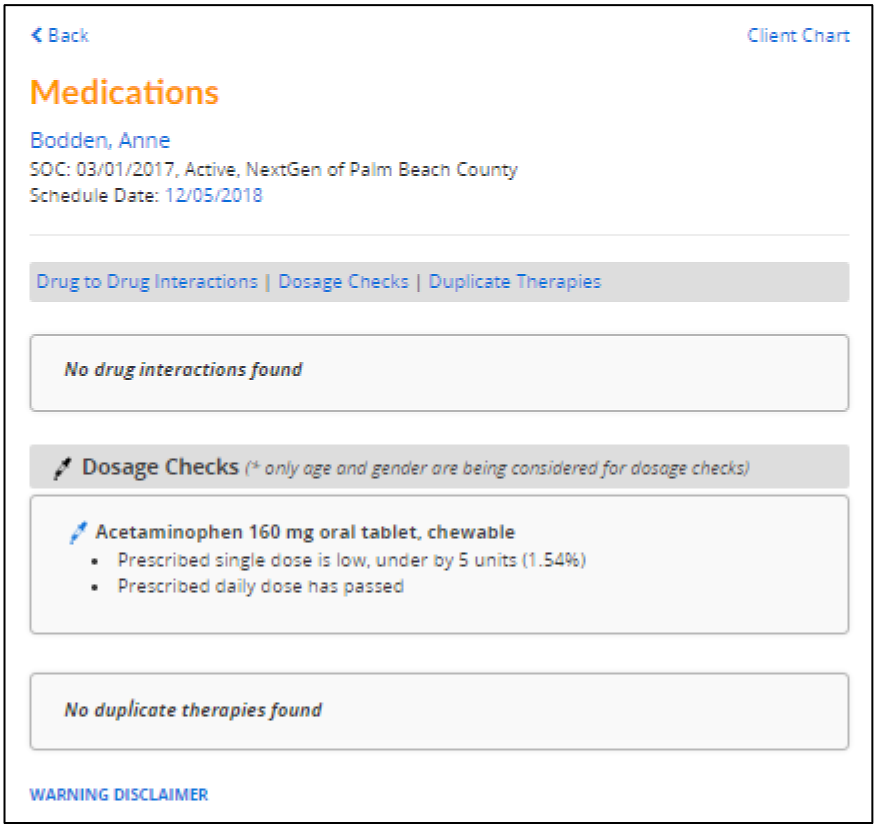
- Client age and gender are required for dosage checks.
- Only age and gender are considered for dosage checks.
- Prescribed single dose and prescribed daily dose warning results appear.
- If there are no dosage warnings, then a message displays: “No dosage warnings found”.

Duplicate Therapies:

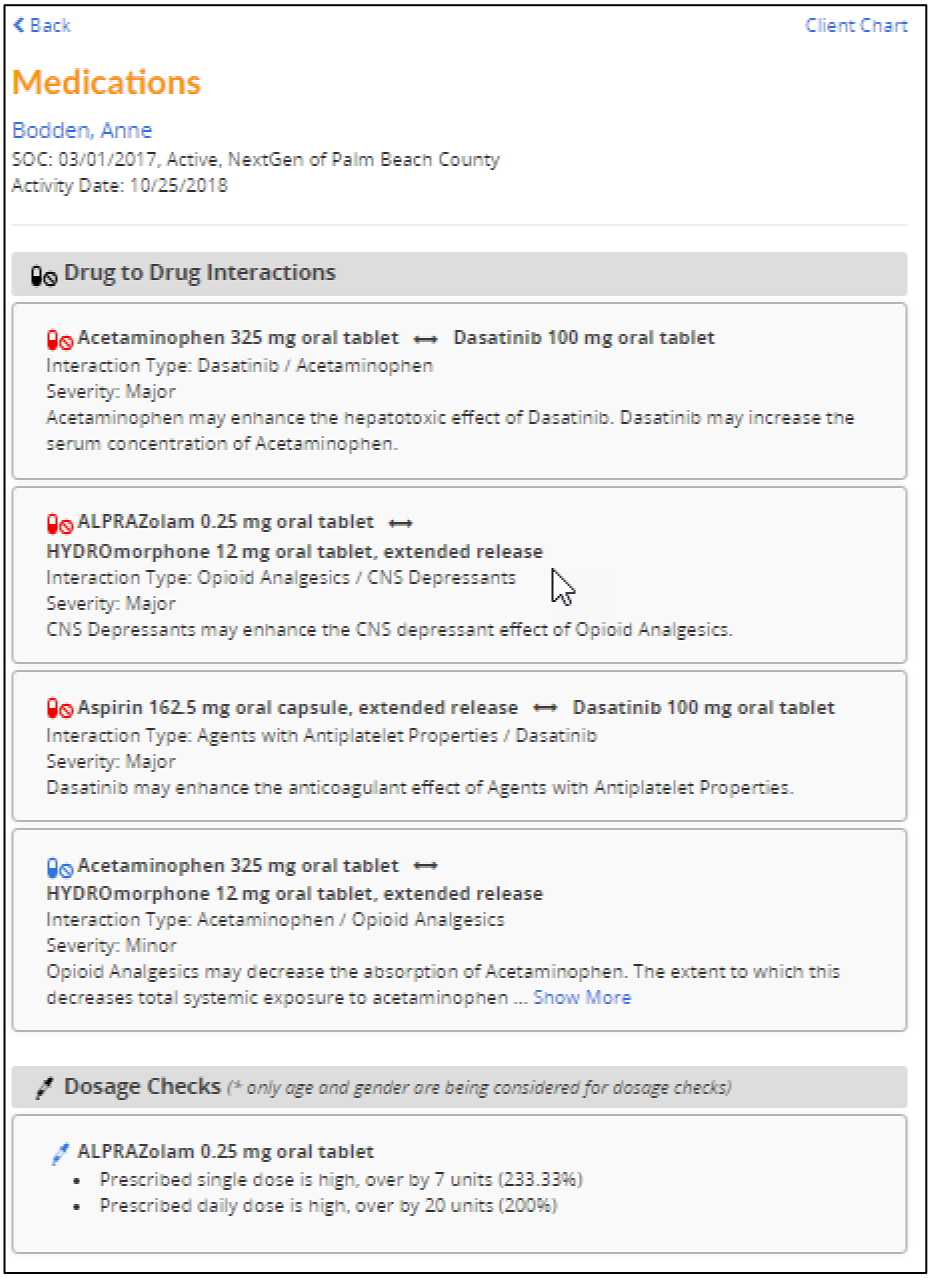
- Displays both duplicate medication names and dosage amounts.

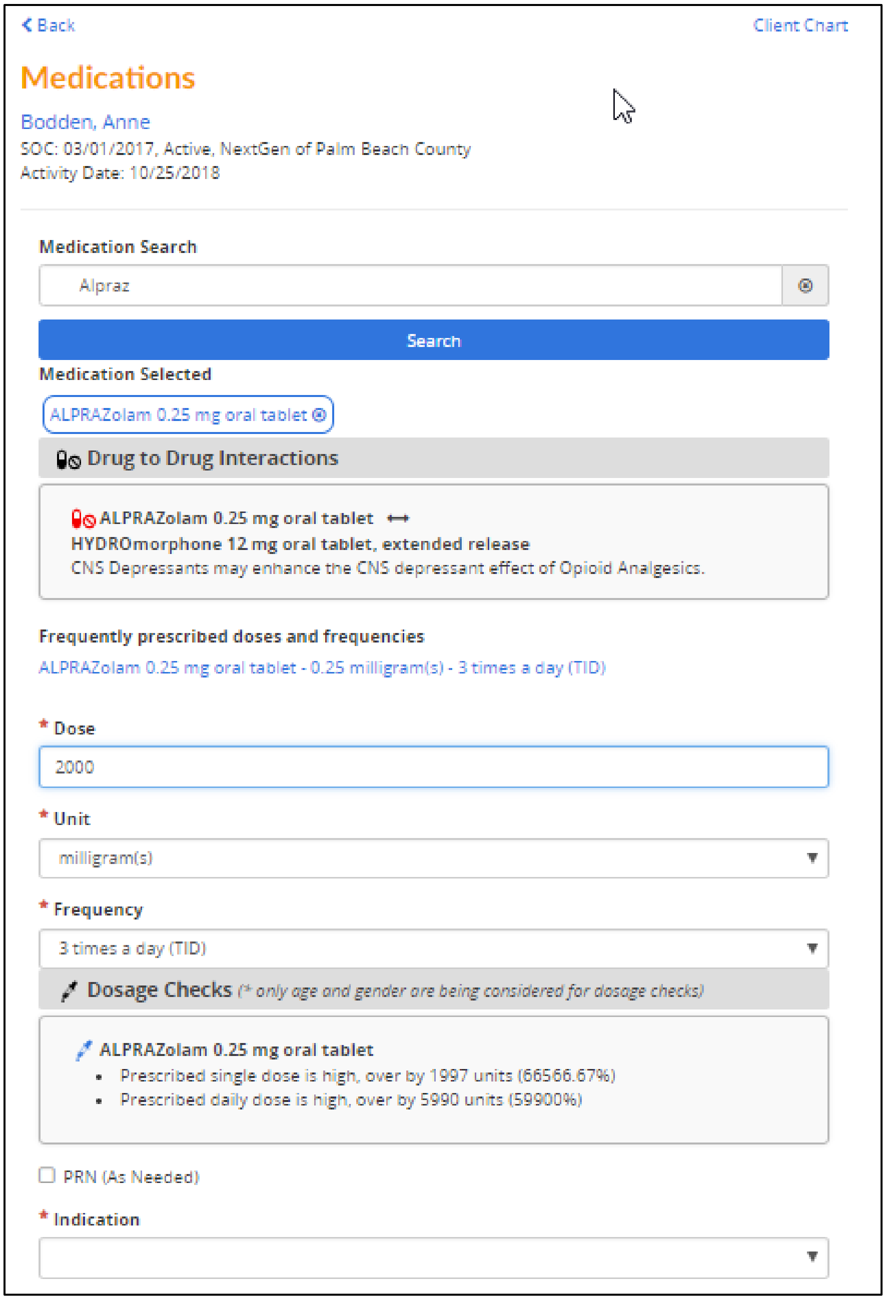
- If there are no duplicate therapies, then a message displays, “No duplicate therapies found” Duplicate check results are based on a threshold determined through research by Lexicomp.

The following is an example of a client with no medication warnings found, only informational:



The following is an example of a client with medication warnings found:





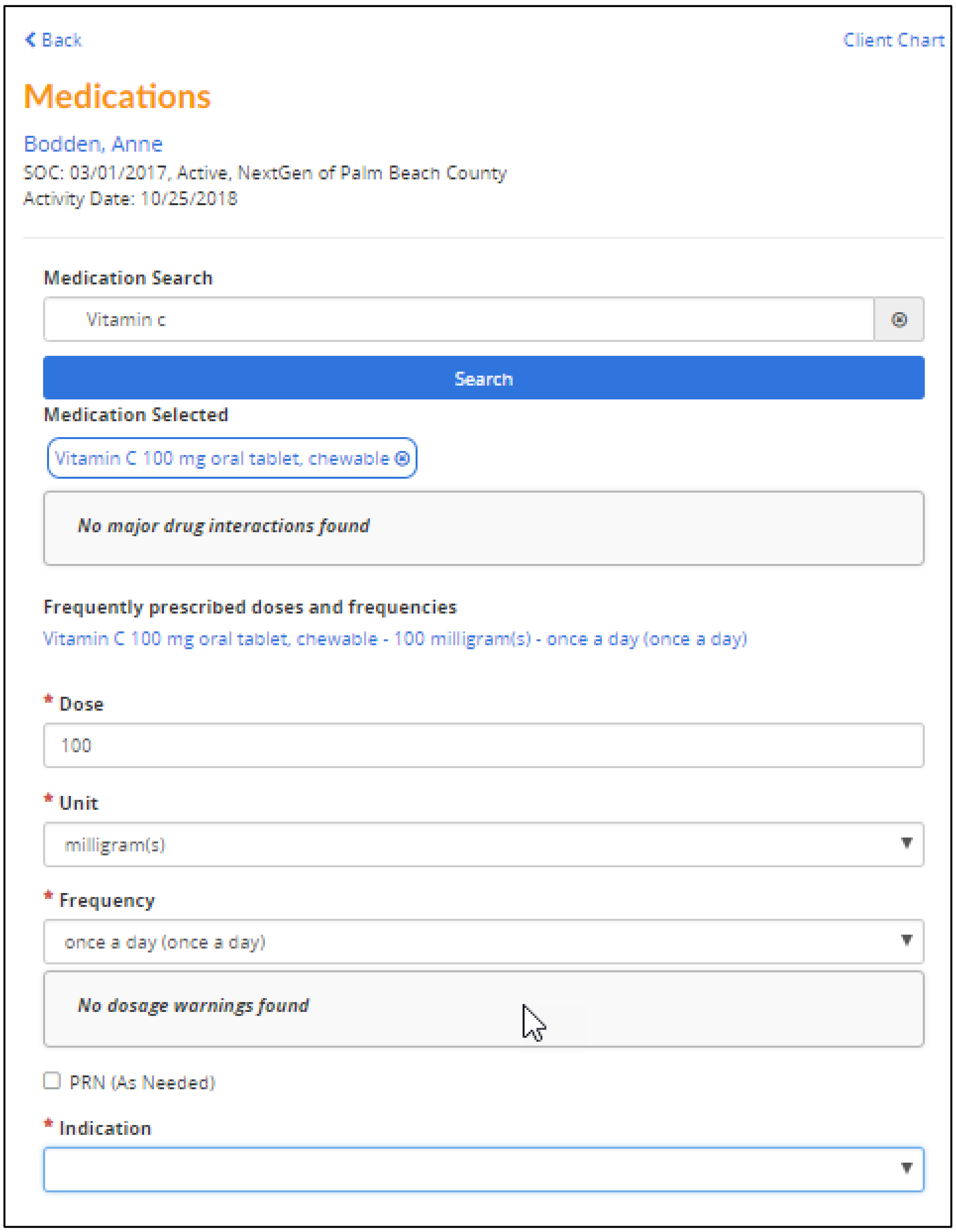
Back
Client Chart
Medications
Bodden, Anne
SOC: 03/01/2017, Active, NextGen of Palm Beach County
Activity Date: 10/25/2018
Medication Search
Alpraz
Search
Medication Selected
ALPRAZolam 0.25 mg oral tablet
Drug to Drug Interactions
ALPRAZolam 0.25 mg oral tablet
HYDROmorphone 12 mg oral tablet, extended release
CNS Depressants may enhance the CNS depressant effect of Opioid Analgesics.
Frequently prescribed doses and frequencies
ALPRAZolam 0.25 mg oral tablet - 0.25 milligram(s) - 3 times a day (TID)
* Dose
2000
* Unit
milligram(s)
* Frequency
3 times a day (TID)
Dosage Checks (* only age and gender are being considered for dosage checks)
ALPRAZolam 0.25 mg oral tablet
Prescribed single dose is high, over by 1997 units (66566.67%)
Prescribed daily dose is high, over by 5990 units (59900%)
PRN (As Needed)
* Indication

Medication Checks when Adding a New Medication UPDATED

When a user adds a new medication:

- Major Drug to Drug Interactions will display after the medication is selected or a message “No major drug interactions found.”
- Dosage Checks will display the results after the Dose, Unit and Frequency fields are populated or the message “No dosage warnings found.”
- Duplicate Therapies will display after the medication is selected or a message “No duplicate therapies found.”

Note: The Interaction and Dosage results are informational only. It does not stop the User from entering the medication.



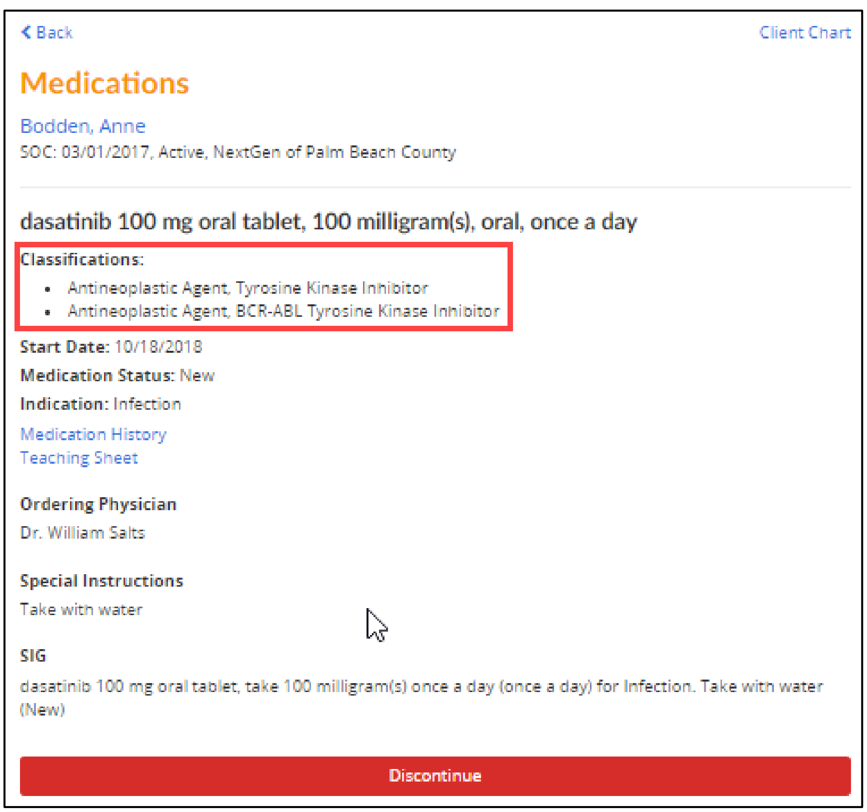
Warning Disclaimer on the Medications Med Check Page

When tapping on the new Warning Disclaimer link in the Medications Med Check Page, the following message appears:

WARNING DISCLAIMER Use of this report is intended for Health Care Professionals. This product utilizes the Lexicomp Integrated (TM) platform, which contains information provided by Lexi-Comp, Inc. (D.B.A. Lexicomp) and/or Multum, Inc (collectively "Providers"). Every effort has been made to ensure that the information provided by Providers is accurate, up-to-date, and complete, but no guarantee is made to that effect. In addition, the drug information contained herein may be time sensitive. Providers' information has been compiled for use by healthcare practitioners and End-Users in the United States. Providers do not warrant that uses outside of the United States are appropriate. Lexicomp's and Multum's drug information does not endorse drugs, diagnose patients or recommend therapy. The Providers' product is designed to supplement, and not a substitute for, the expertise, skill, knowledge and judgment of healthcare practitioners. Healthcare practitioners should use their professional judgment in using the information provided. The absence of a warning for a given drug or drug combination in no way should be construed to indicate that the drug or drug combination is safe, effective or appropriate for any given patient. Neither Lexicomp nor Multum assume any responsibility for any aspect of healthcare administered with the aid of information Lexicomp and its affiliates provides. The information contained herein is not intended to cover all possible uses, directions, precautions, warnings, drug interactions, allergic reactions, or adverse effects.

Medications Classifications Display on the Medications Details Page

The Classifications for a medication now display on the Medications Detail page.

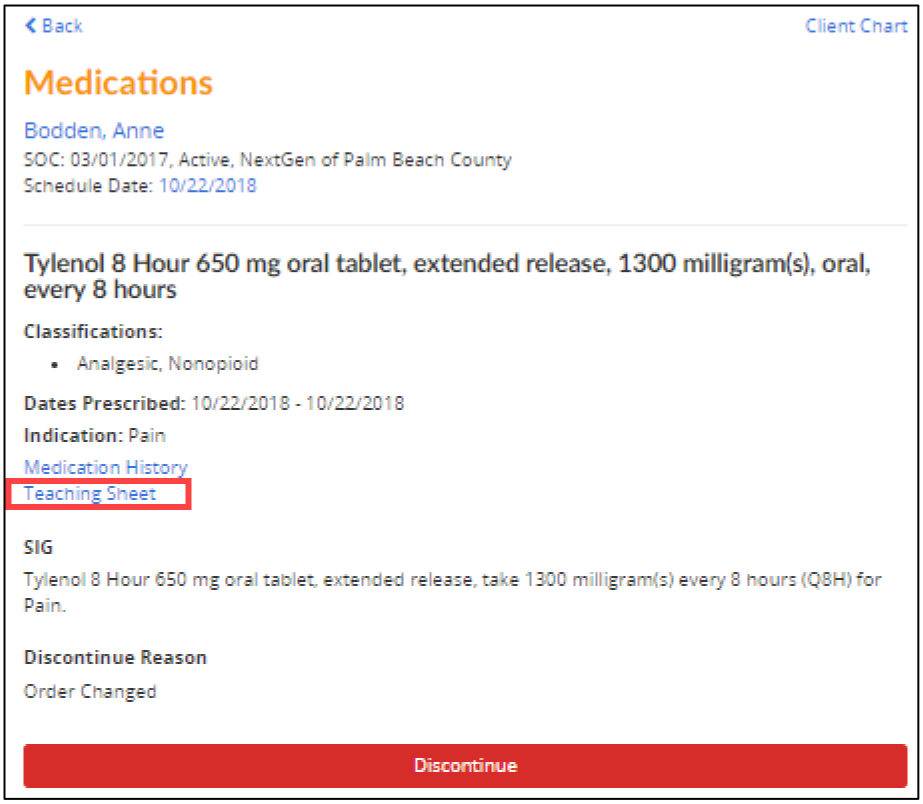


Medication Module – Teaching Sheet

A user in the back office and a clinician or skilled professional user can now view Teaching Sheets. A link has been added to the Medications details page.

To view the Teaching Sheet:

1. On the Medications details page, tap the Teaching Sheet link.



The Teaching Sheet page shows detailed information about the client's medication.

- The information is view only and cannot be modified.
- Teaching Sheets open in a new tab and can be printed using the device printer.
- In the back office, the user can right-click and select **Print** from the menu.
- To return to the Medications page, tap the **X** to close the Teaching Sheet tab.

acetaminophen (oral)

Pronunciation: a SEET a MIN oh fen

Brand: Actamin, Anacin AF, Apra, Bromo Seltzer, Children's Tylenol, Elixsure Fever/Pain, Mapap, Medi-Tabs, Q-Pap, Silapap Childrens, Tactinal, Tempra Quicklets, Tycolene, Tylenol, Vitapap

What is the most important information I should know about acetaminophen?

- You should not use this medication if you have severe liver disease.
- **An overdose of acetaminophen can damage your liver or cause death.**
  - **Adults and teenagers who weigh at least 110 pounds** should not take more than 1000 milligrams (mg) at one time, or more than 4000 mg in 24 hours.
  - **Children younger than 12 years old** should not take more than 5 doses in 24 hours, using only the number of milligrams per dose that is recommended for the child's weight and age. **Use exactly as directed on the label.**
- Avoid also using other medicines that contain acetaminophen (sometimes abbreviated as APAP), or **you could have a fatal overdose.**
- Call your doctor at once if you have nausea, pain in your upper stomach, itching, loss of appetite, dark urine, clay-colored stools, or jaundice (yellowing of your skin or eyes).
- **Stop taking this medicine and call your doctor right away if you have skin redness or a rash that spreads and causes blistering and peeling.**

What is acetaminophen?

- There are many brands and forms of acetaminophen available. Not all brands are listed on this leaflet.
- Acetaminophen is a pain reliever and a fever reducer.
- Acetaminophen is used to treat many conditions such as headache, muscle aches, arthritis, backache, toothaches, colds, and fevers.
- Acetaminophen may also be used for purposes not listed in this medication guide.

What should I discuss with my healthcare provider before taking acetaminophen?

- You should not take acetaminophen if you are allergic to it, or if you have severe liver disease.
- **Do not take acetaminophen without a doctor's advice if** you have ever had alcoholic liver disease (cirrhosis) or if you drink more than 3 alcoholic beverages per day. You may not be able to take acetaminophen.
- Your doctor will determine whether acetaminophen is safe for you to use during pregnancy. **Do not use this medicine without the advice of your doctor if you are pregnant.**
- Acetaminophen can pass into breast milk and may harm a nursing baby. Tell your doctor if you are breast-feeding a baby.
- Do not give this medicine to a child younger than 2 years old without the advice of a doctor.

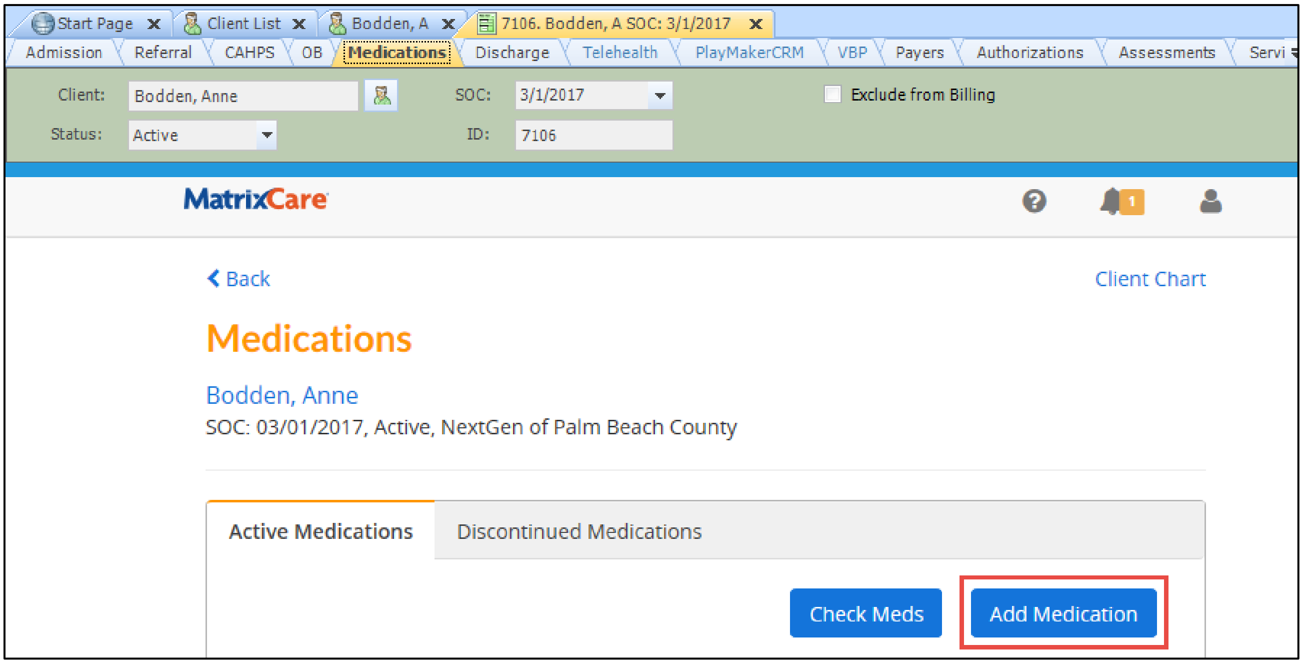
How should I take acetaminophen?

- Use exactly as directed on the label, or as prescribed by your doctor. Do not use in larger or smaller amounts or for longer than recommended.
- Do not take more than your recommended dose. **An overdose of acetaminophen can damage your liver or cause death.**
  - **Adults and teenagers who weigh at least 110 pounds (50 kilograms):** Do not take more than 1000 milligrams (mg) at one time. Do not take more than 4000 mg in 24 hours.
  - **Children younger than 12 years old:** Do not take more than 5 doses of acetaminophen in 24 hours. Use only the number of milligrams per dose that is recommended for the child's weight and age. **Use exactly as directed on the label.**

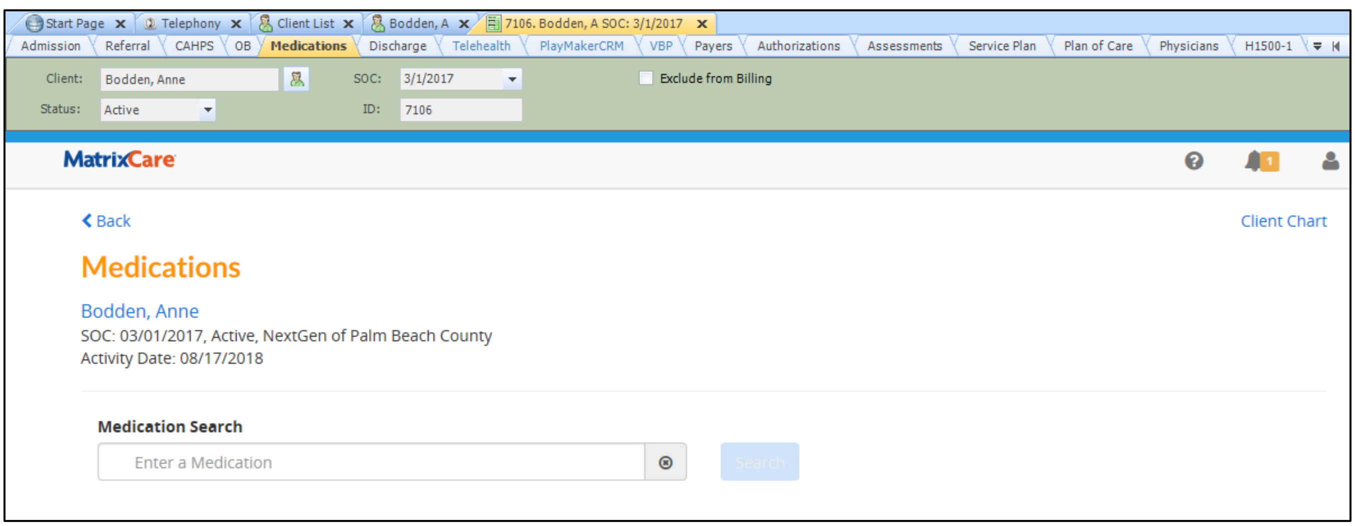
Adding Medication to a Client Admission

Use the Admission>Medications tab to add medication to a client's admission.

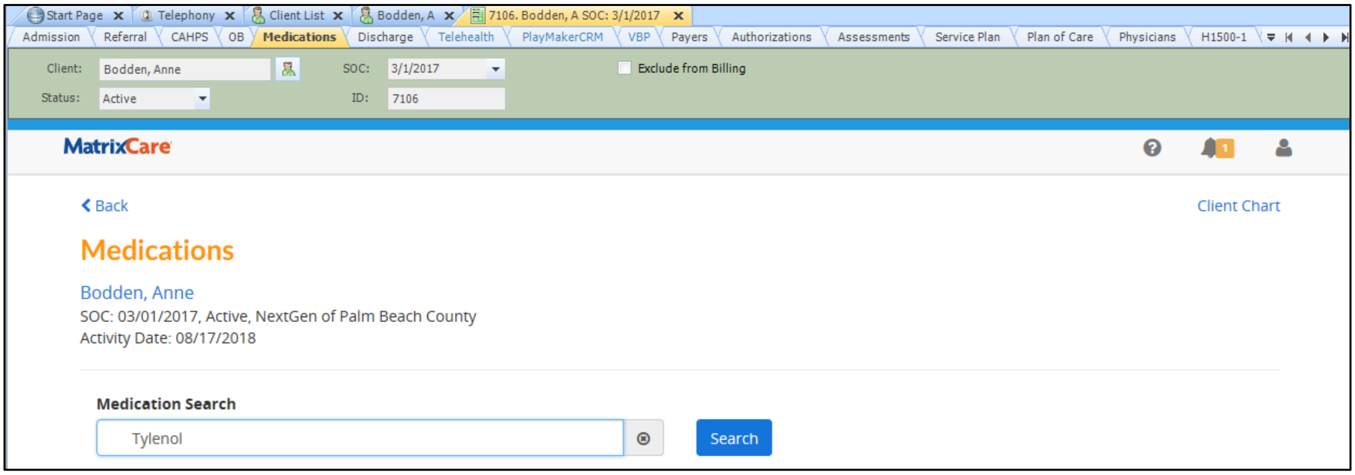
1. To add a medication, click **Add Medication**.



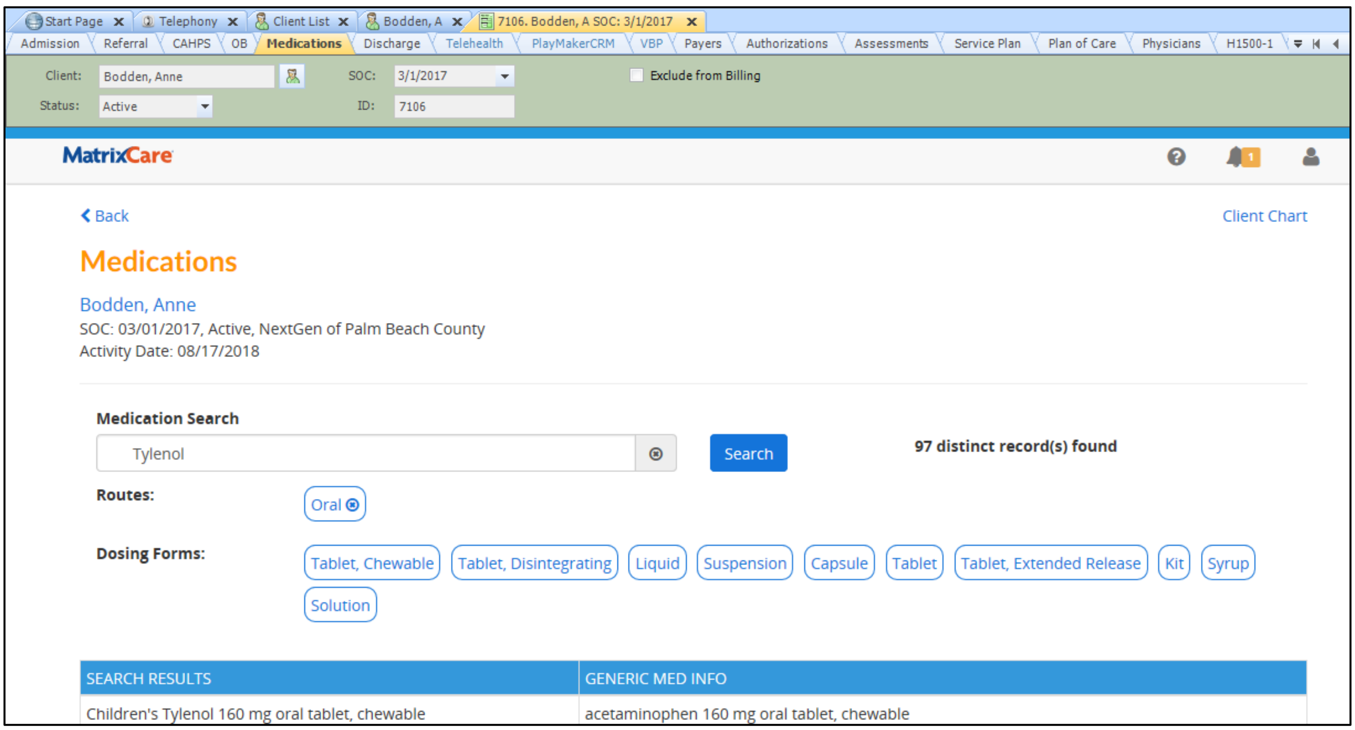
The application allows you to search for a medication by entering three or more characters.



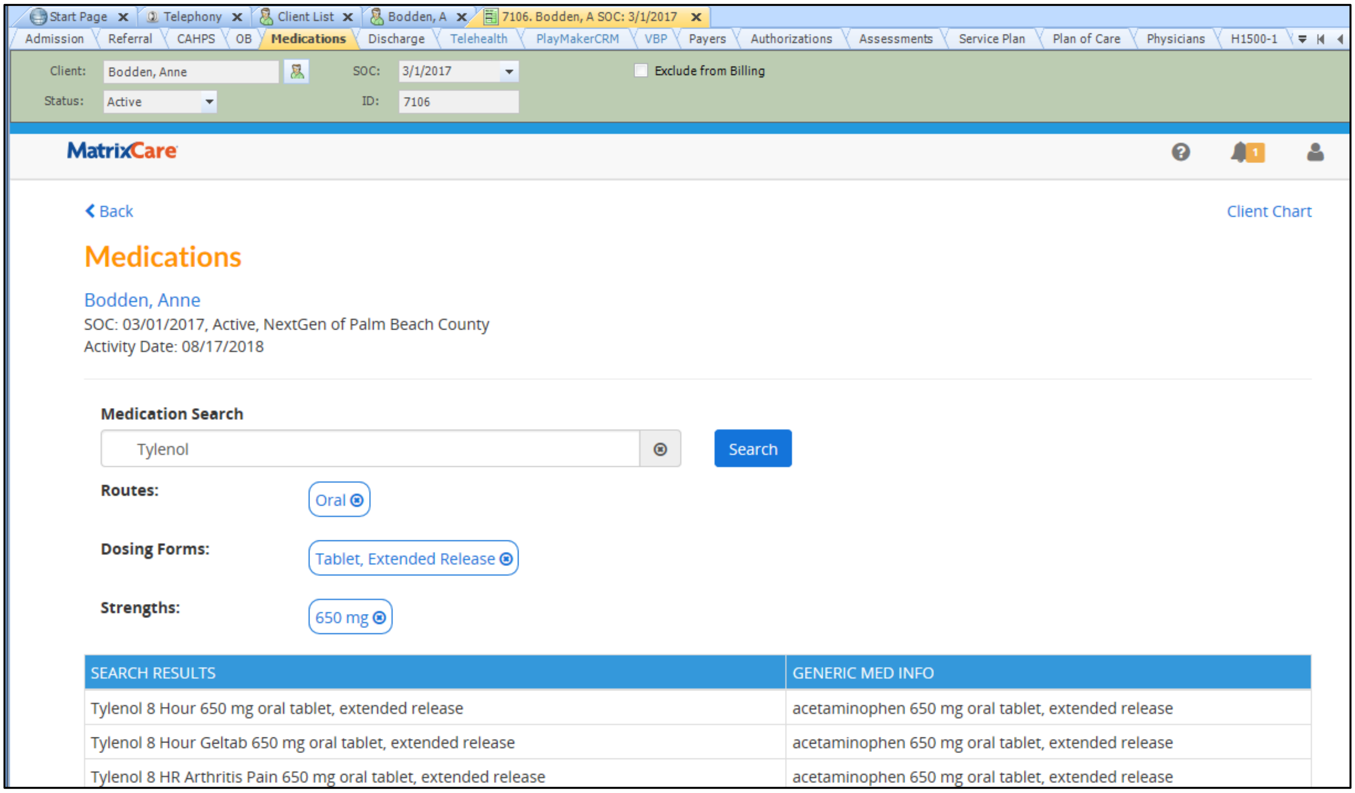
2. Enter the medication you want to search for, such as Tylenol.



3. Click **Search**.



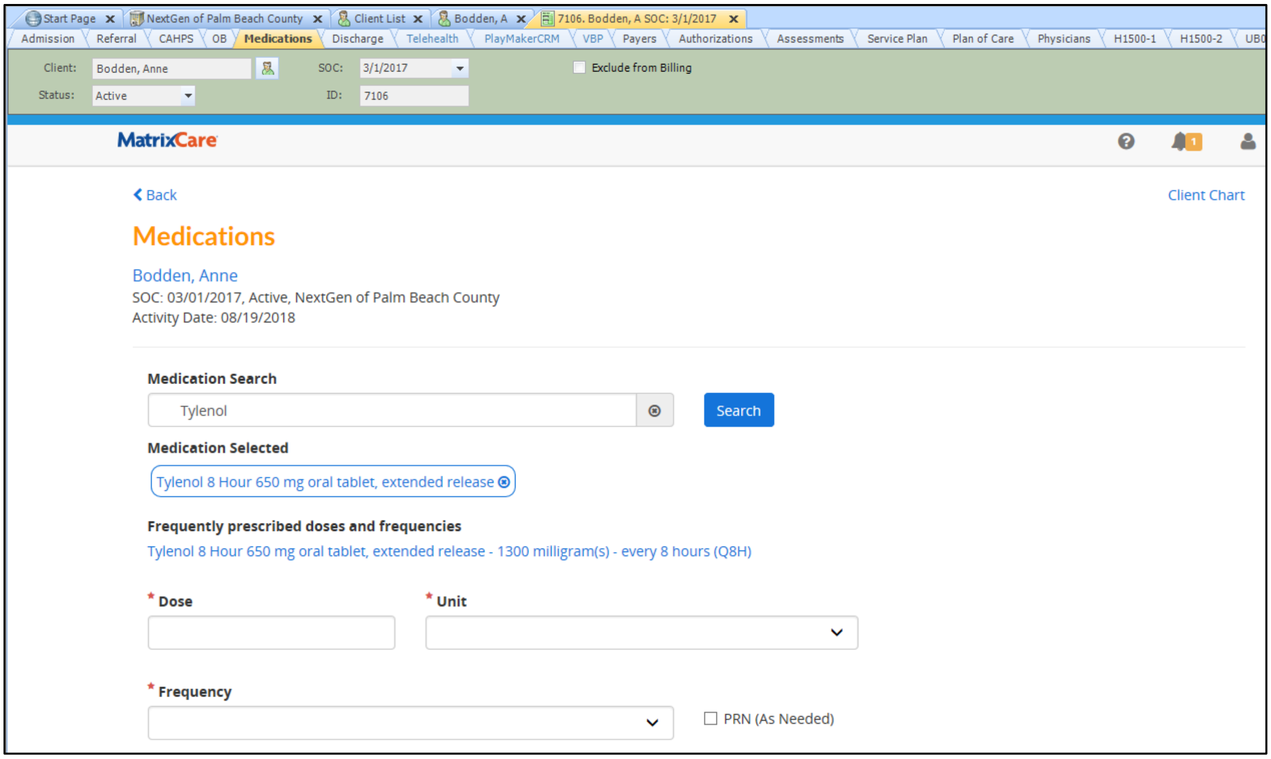
A list of options appears for you to select the medication routes, dosing forms and strengths. When selecting options, the application filters the specified medication(s). For example, if you select a dosing form of **Tablet, Extended Release**, the application will filter to display just those medications. The available filters are optional.



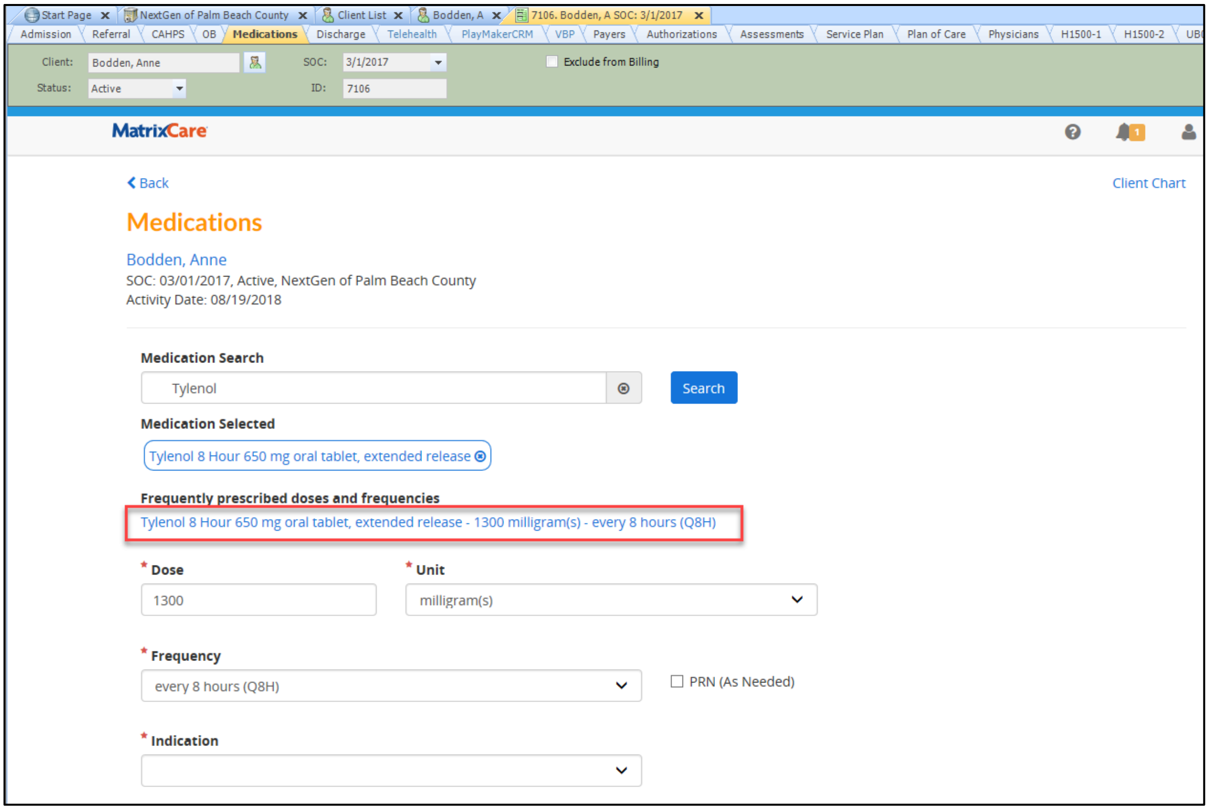
The left hand column displays based on the “search” and the right hand column is the generic equivalent to the search results.

Note: The Medications list is populated using the Lexicomp tables when searching and selecting medications.

4. In the search results, click a medication to select it.

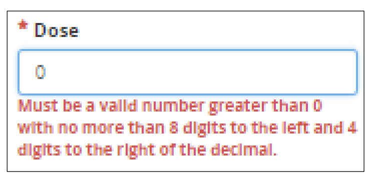


5. The frequently prescribed doses and frequencies for the selected medication will display when available. Select a **Frequently prescribed doses and frequencies** to populate the dose, unit and frequency fields if applicable. Or you can manually enter the dose, unit and frequency in the individual fields. *=required fields, these fields must be entered to save the medication.

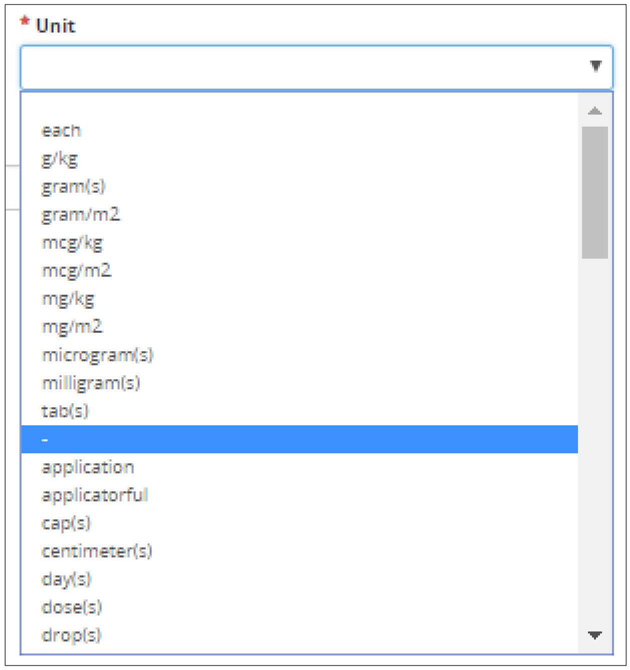


6. Click to add, modify or select an item in the following medication fields.

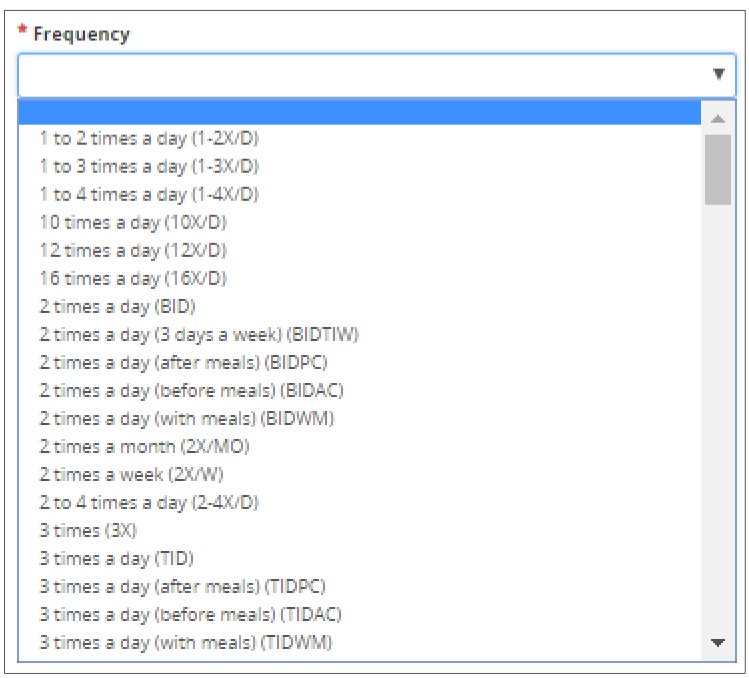
- **Dose** – must be a valid number greater than zero with no more than eight digits to the left and four digits to the right of the decimal.



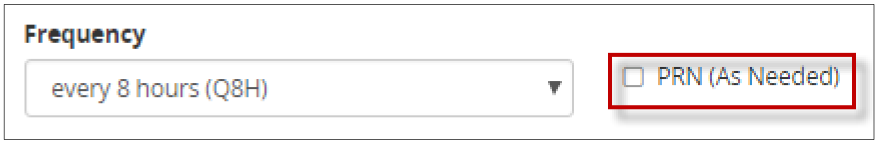
- **Unit –** a list box will display the commonly prescribe units for the selected medication when available at the top of the list. Then the list box may show a dash and then shows all the potential unit types available after.



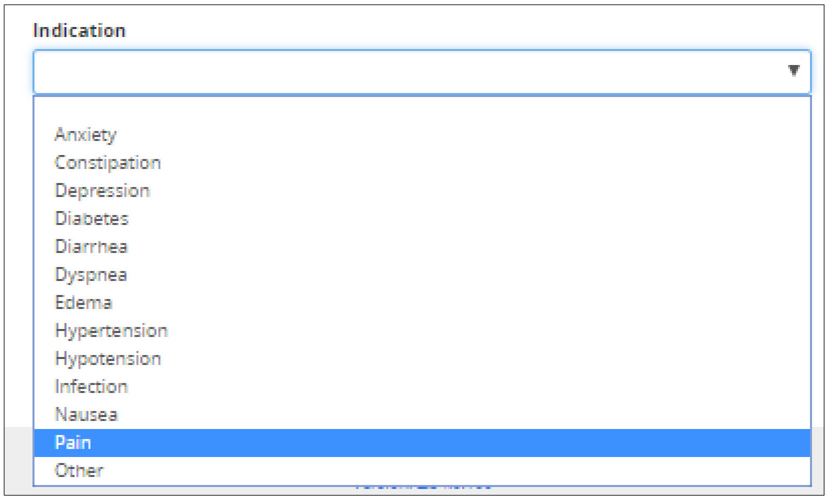
- **Frequency** – a list box of options shows how often the medication should be taken.



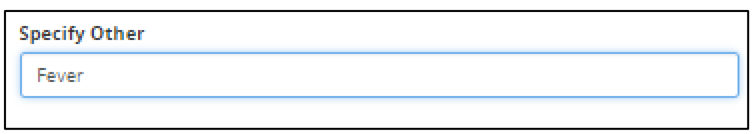
7. Check the PRN box, if the medication is prescribed as needed.



8. In the Indication list box select why the client is prescribed the medication.

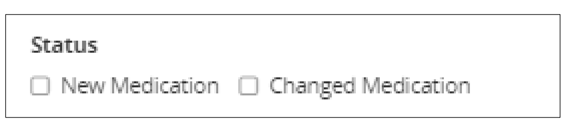


Note: If you select an Indication of **Other**, a Specify Other text box appears requiring you to enter the reason for the medication. You can enter a maximum of 50 characters in the field.

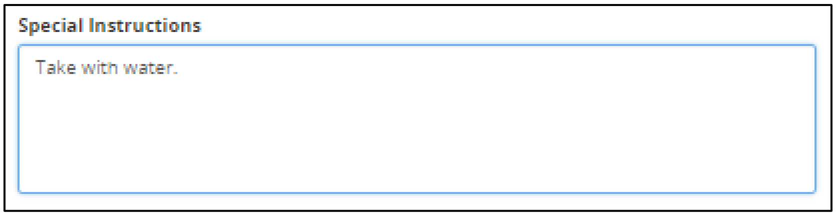


Additional fields will display after Indication is selected.

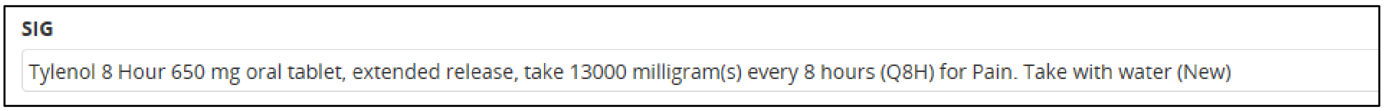
9. Status; if applicable, check one of the check boxes:
   - New Medication
   - Changed Medication



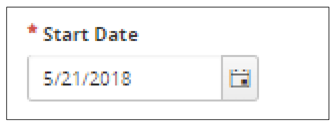
10. Enter special instructions. You can enter a maximum of 250 characters in the field.



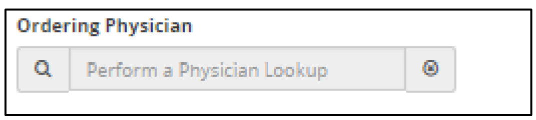
11. SIG is the Physician's instruction for how the patient should use the medication. The SIG is auto-populated based on the medication entry data fields above and is read only. Verify the SIG information is correct. The SIG is what gets printed on reports and should match the instructions the Physician has given for the medication.

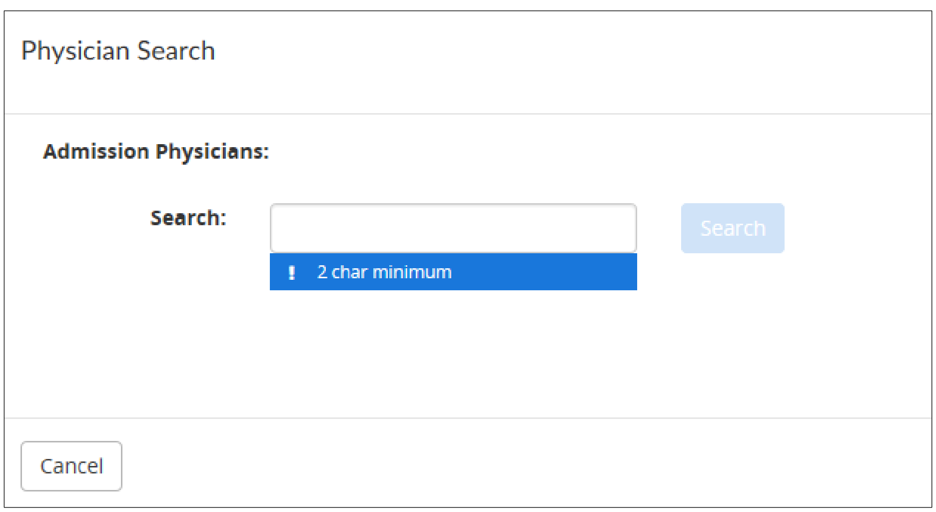


12. The Start date defaults to today's date and can be modified by clicking on the date picker.

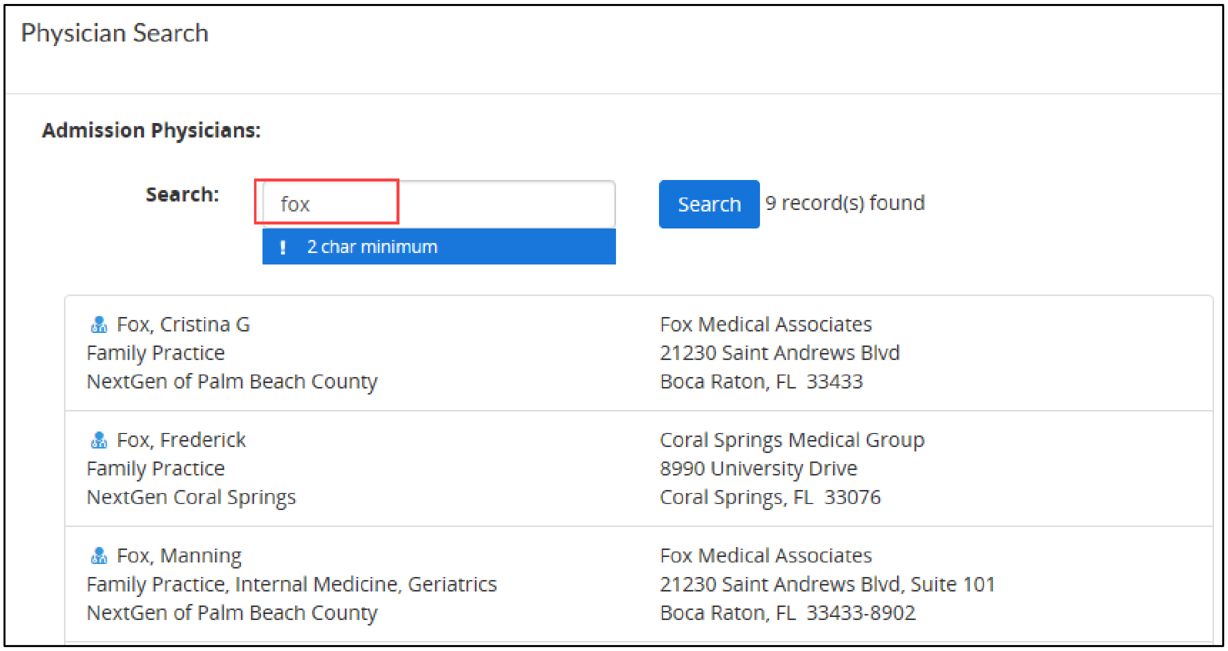


13. The Ordering Physician field is optional. To enter the Ordering Physician, click the magnifying glass to search and then select the physician that prescribed the medication.



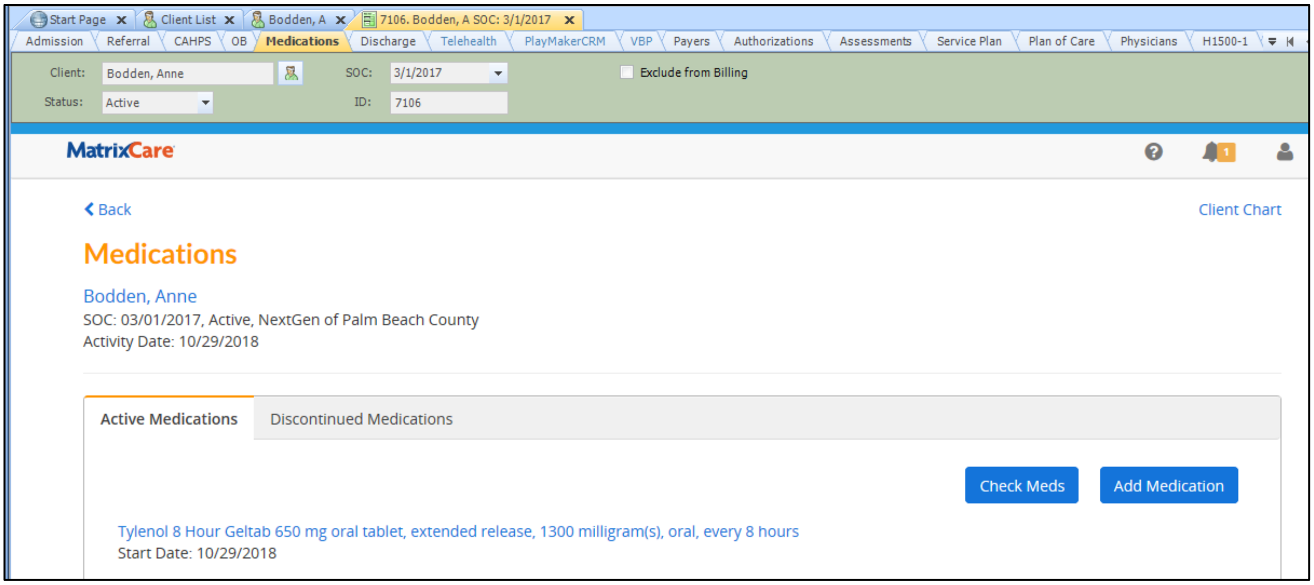


- **Note**: You must enter a minimum of two characters when searching for a physician. You can search by the first two characters of the last name, or the last name and first two characters of the first name or by entire last name, first name and click **Search**.



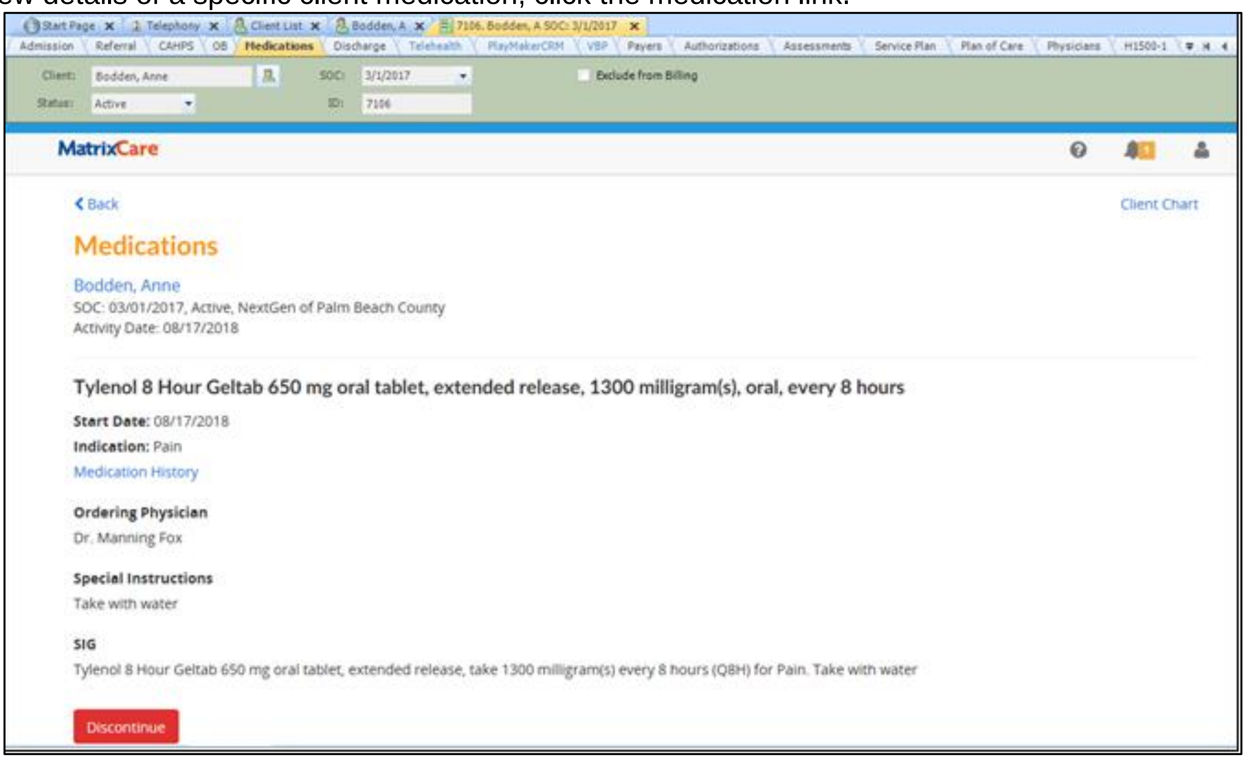
14. Select a physician and click **Confirm**.

The new medication now displays in the list on the Active Medications tab. Active medications are sorted by start date in reverse chronological order.



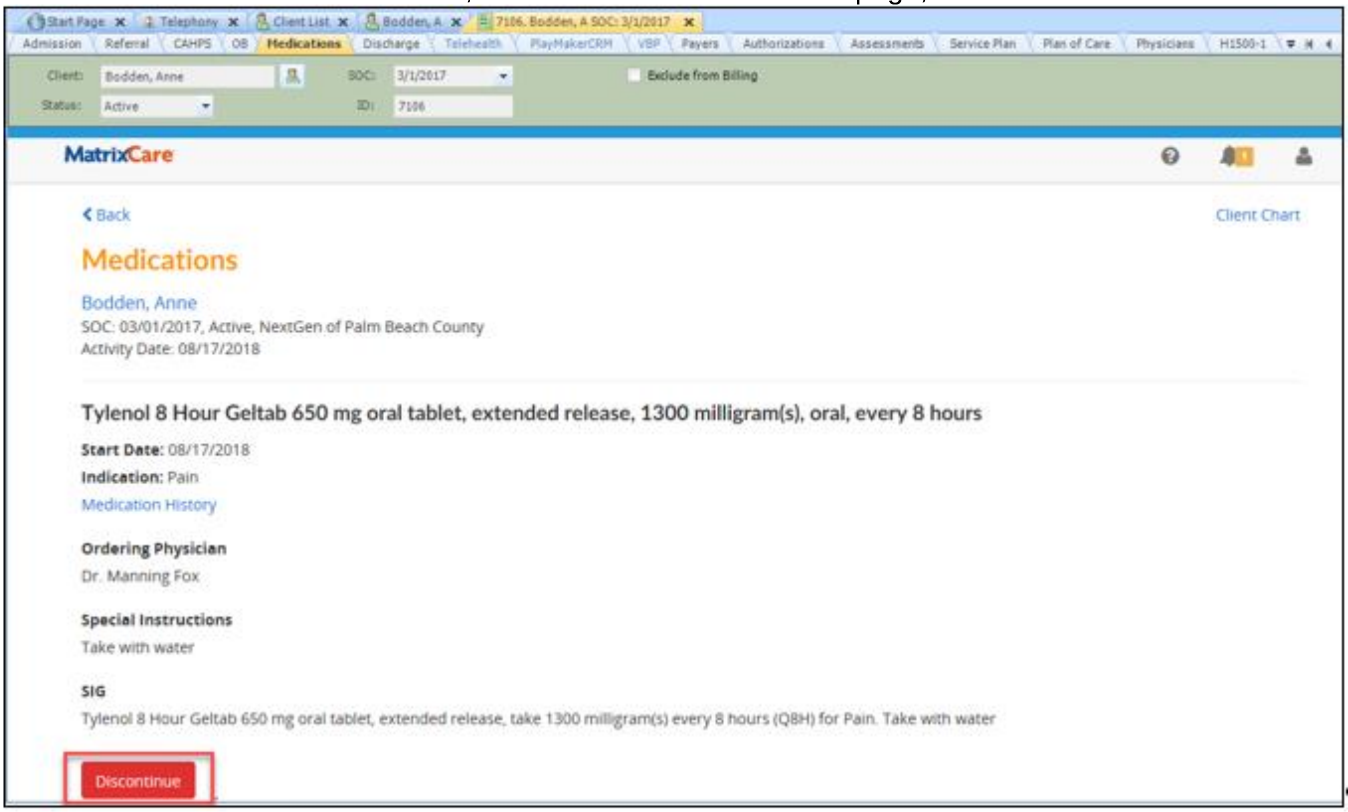
Follow the previous steps to enter additional medications for the client.

To view details of a specific client medication, click the medication link.



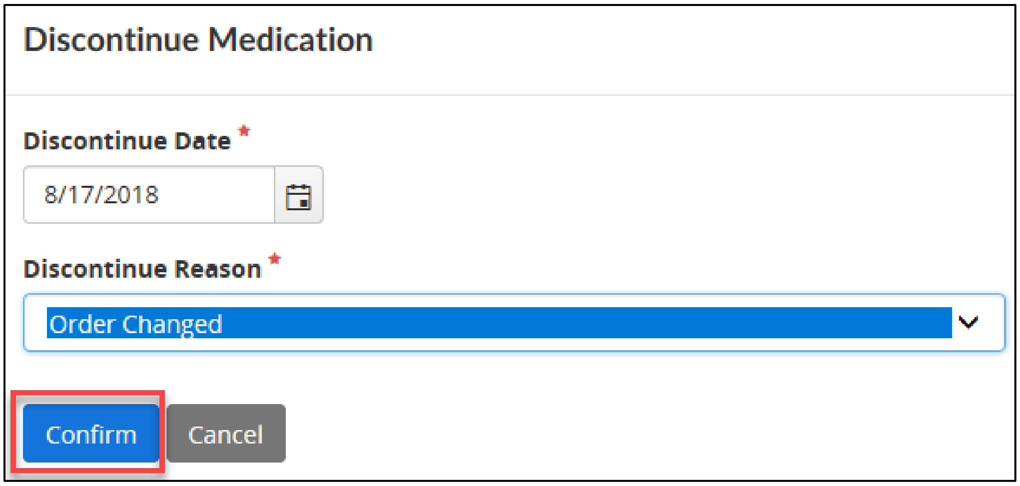
Discontinuing a Medication

1. To discontinue a medication, from the Medications details page, click **Discontinue**.

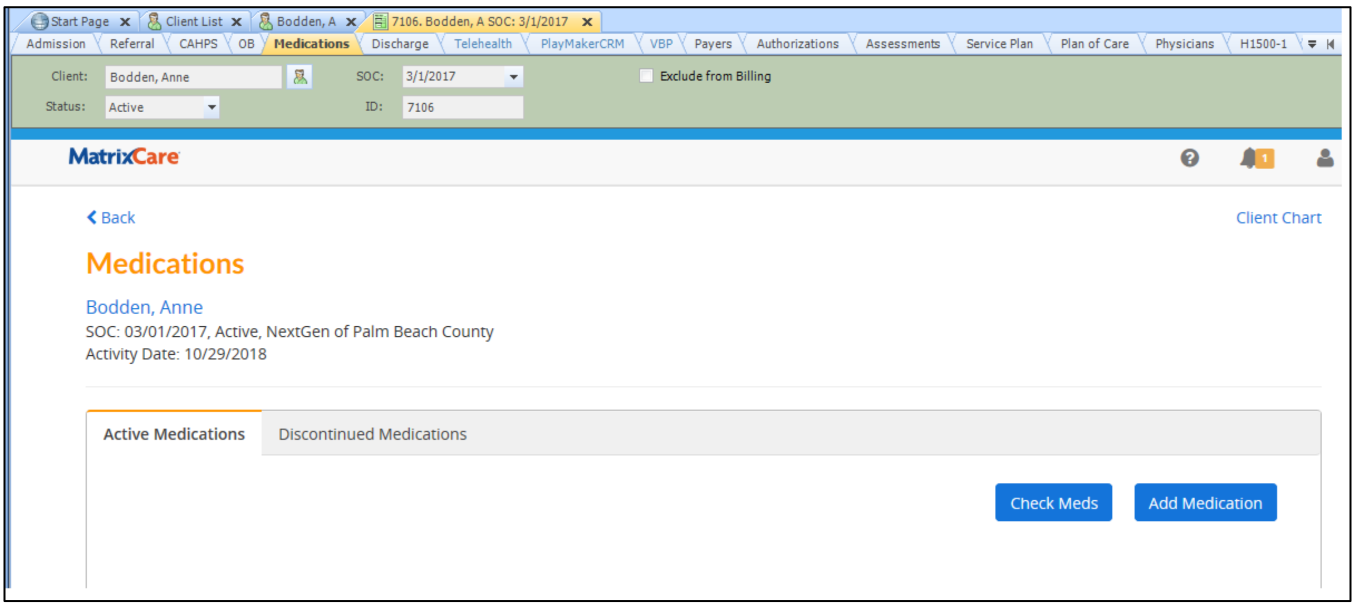


2. Enter the date the medication will be discontinued. The default date is todays date and can be changed by clicking the date picker.
3. Enter the reason for discontinuing the medication.

   Note: If you select an Discontinue Reason of **Other**, a Please Specify Other text box appears requiring you to enter the reason for the discontinuation of medication. You can enter a maximum of 50 characters in the field.

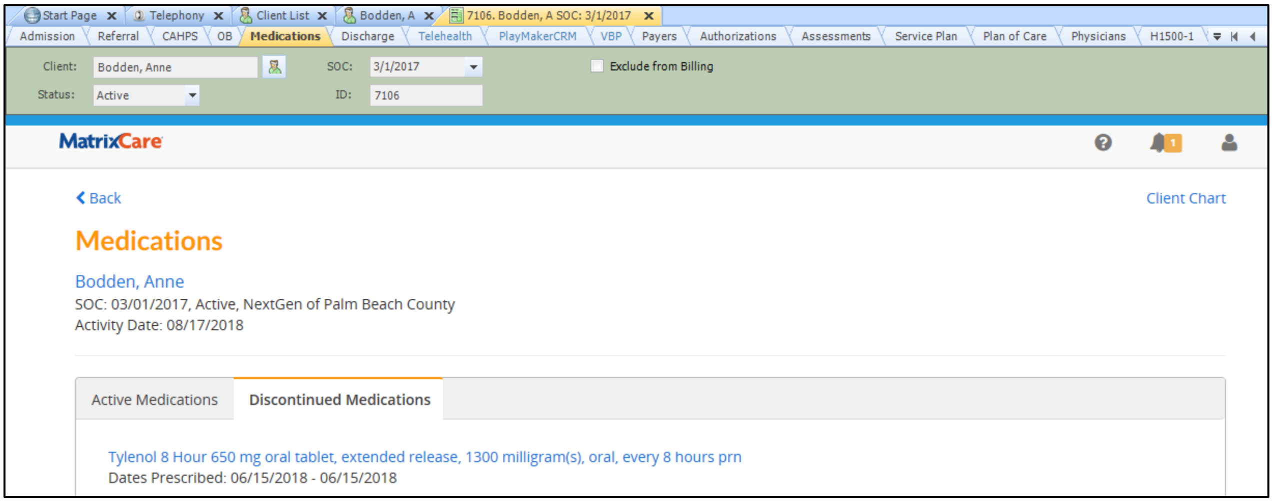


4. Click **Confirm**. The view returns to the Active Medications tab.



Discontinued Medications appear on the Active Medications tab until midnight of the discontinued date (today or a future date), and then is moved to the Discontinued Medications tab. Discontinued medications are sorted by start date in reverse chronological order.

5. Click the **Discontinued Medications** tab to view medication that is no longer provided to the client.



Admission - Medication Reports

A Medication report is available on the Admission Reports tab for use with the Admission Medication Module.

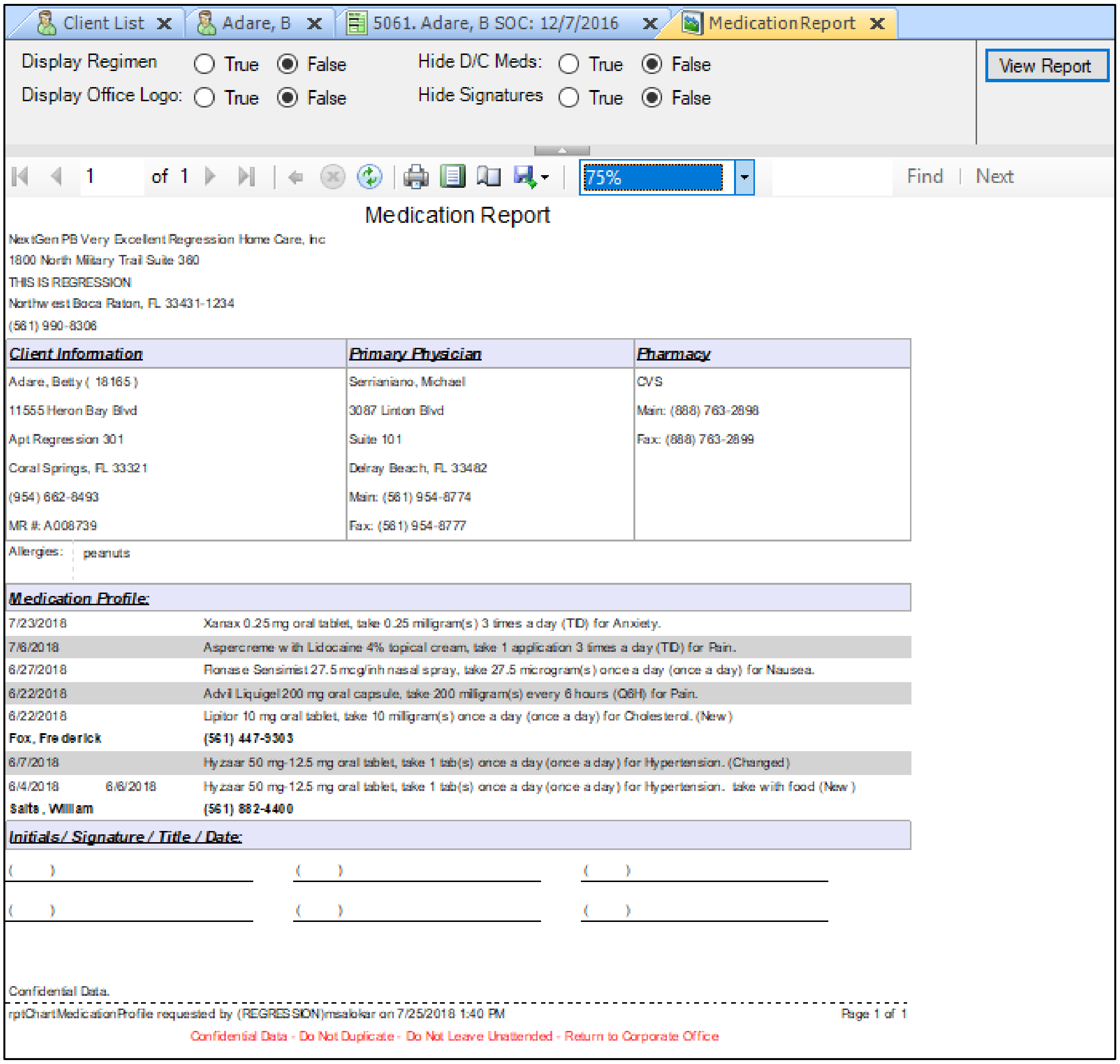
On the Admission > Reports tab, the new Medication Report prints the medication profile from the Admission Medication tab. All parameters default to False and are all optional.

Report Parameters include:

- Display Regimen - True or False
- Hide D/C Meds - True or False
- Display Office Logo - True or False
- Hide Signatures - True or False

The Primary Physician is populated from the Admission.Physician tab. In the medication profile, when a medication entry has an Ordering Physician, and that Ordering Physician is not the Primary Physician then the Ordering Physician is printed.

Note: This report is only available when the Medication Module is enabled for the Admission.



Medication Report

NextGen PB Very Excellent Regression Home Care, Inc
1800 North Military Trail Suite 380
THIS IS REGRESSION
Northwest Boca Raton, FL 33431-1234
(561) 990-8306

Client Information	Primary Physician	Pharmacy
Adare, Betty (18165)	Serrianiano, Michael	CVS
11555 Heron Bay Blvd	3087 Linton Blvd	Main: (888) 763-2898
Apt Regression 301	Suite 101	Fax: (888) 763-2899
Coral Springs, FL 33321	Delray Beach, FL 33482	
(954) 662-8493	Main: (561) 954-8774	
MR #: A008739	Fax: (561) 954-8777	

Allergies: peanuts

Medication Profile:

7/23/2018		Xanax 0.25 mg oral tablet, take 0.25 milligram(s) 3 times a day (TID) for Anxiety.
7/6/2018		Aspercreme with Lidocaine 4% topical cream, take 1 application 3 times a day (TID) for Pain.
6/27/2018		Flonase Sensimist 27.5 mcg/inh nasal spray, take 27.5 microgram(s) once a day (once a day) for Nausea.
6/22/2018		Advil Liquigel 200 mg oral capsule, take 200 milligram(s) every 6 hours (Q6H) for Pain.
6/22/2018		Lipitor 10 mg oral tablet, take 10 milligram(s) once a day (once a day) for Cholesterol. (New)
Fox, Frederick		**(561) 447-9303**
6/7/2018		Hyzaar 50 mg-12.5 mg oral tablet, take 1 tab(s) once a day (once a day) for Hypertension. (Changed)
6/4/2018	6/6/2018	Hyzaar 50 mg-12.5 mg oral tablet, take 1 tab(s) once a day (once a day) for Hypertension. take with food (New)
Salts, William		**(561) 882-4400**

Initials / Signature / Title / Date:

( ) ______ ( ) ______ ( ) ______

( ) ______ ( ) ______ ( ) ______

Confidential Data.

rptChartMedicationProfile requested by (REGRESSION)msalokar on 7/25/2018 1:40 PM Page 1 of 1

Confidential Data - Do Not Duplicate - Do Not Leave Unattended - Return to Corporate Office

New Group Permissions for Skilled Professional Users

New permissions for the skilled professional users (POC User (Skilled)) now include:

- Admission – Read
- Admission.ChartHistory – Read
- Admission.Physician – Read
- Client.InpatientTracking – Read, Edit and Add (Delete was removed)

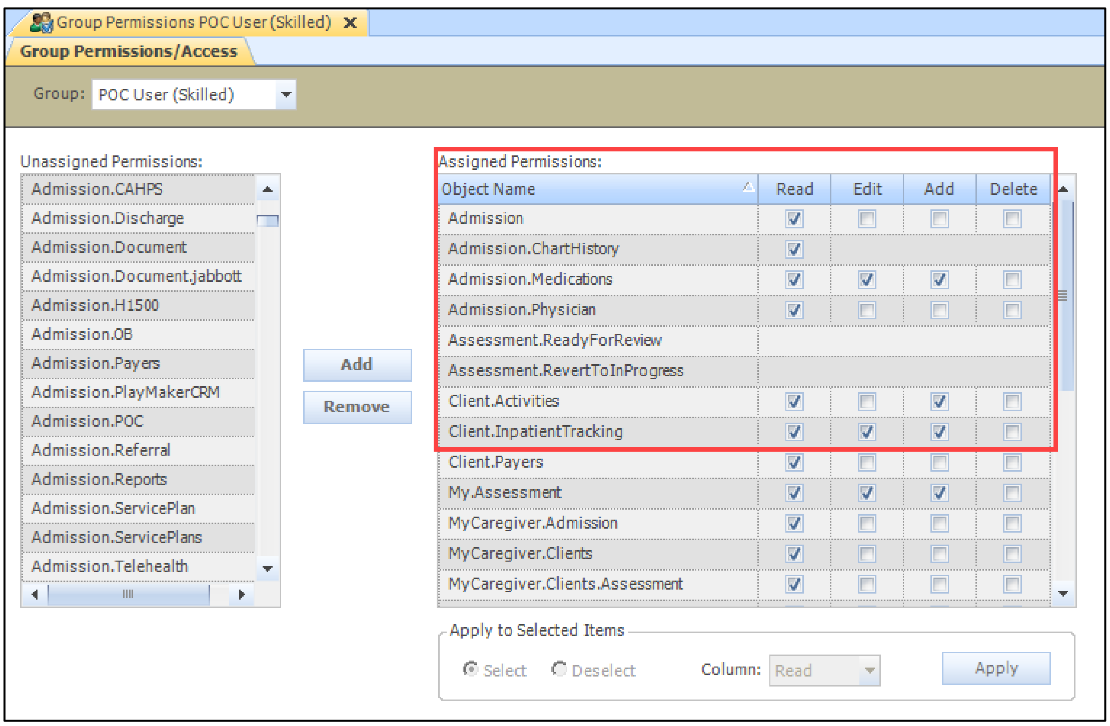
Admission – Read permission allows users to access the Client Chart.

Admission.ChartHistory – Read displays the Medication History link on the Medication details page.

Admission.Physician – Read when adding a medication defaults the admission primary physician in the ordering physician field and displays the client's Admission Physicians when searching for physicians.

Client.InpatientTracking – Read, Edit and Add (Delete was removed) the delete button no longer displays on the Inpatient Tracking records.

Note: Any **Custom Permission Groups** for the Skilled Professional user - must have **Admission – Read** added for the clinician to access the client chart. Additionally, Admission.ChartHistory and Admission.Physician can be added.



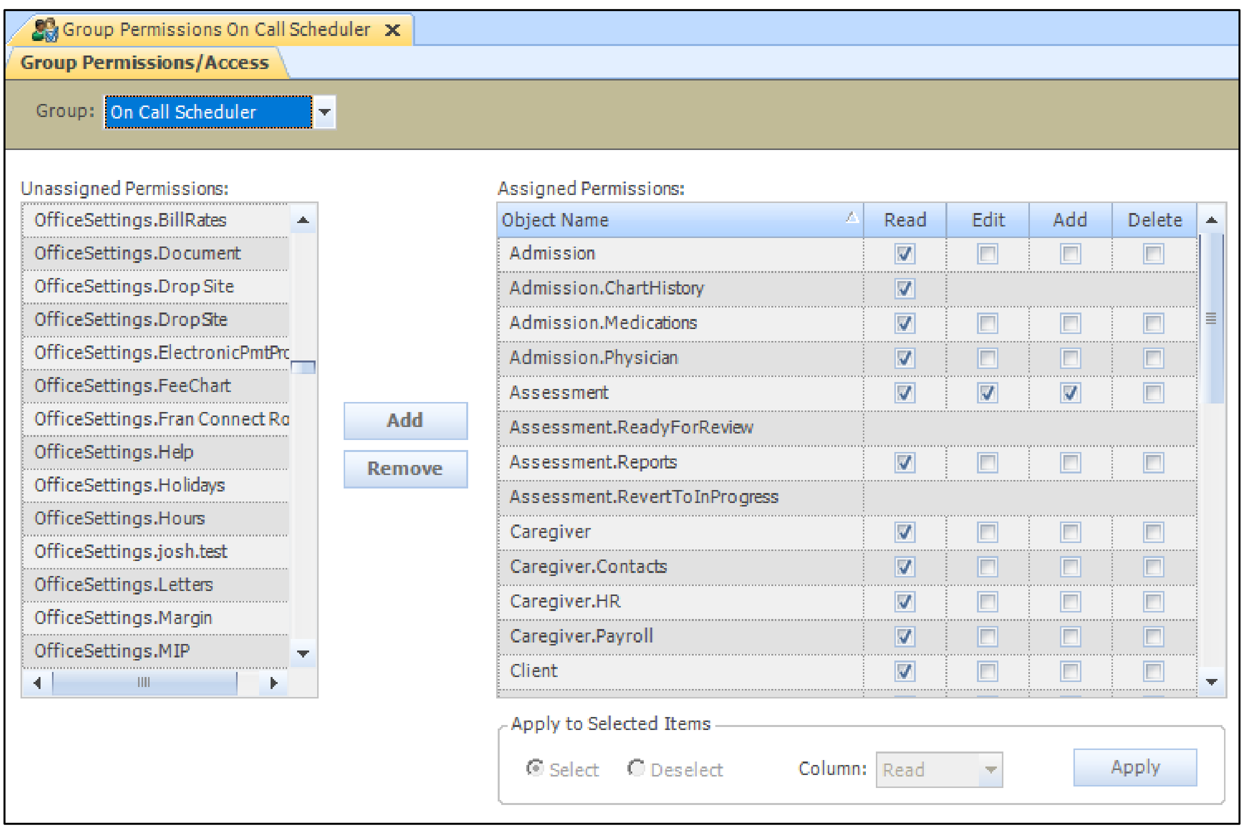
New Group Permissions for the On Call Scheduler Users

New permissions for the On Call Scheduler Group now include:

- Admission.ChartHistory – Read
- Admission.Medications – Read
- Assessment – Read, Edit and Add
- Assessment.ReadyForReview
- Assessment.RevertToInProgress
- Assessment.Reports – Read
- My.Assessment – Read, Edit and Add
- Client.Activities – Read and Add
- Client.InpatientTracking – Read, Edit and Add

Important! In the Client Chart the On Call Scheduler can now; Edit and Add Inpatient Tracking records, create and sign Forms, and view Medications.

Note: Any **Custom Permission Groups** for the On Call Scheduler user may need to be updated with the desired permissions. **Admission – Read** is required to access the client chart.

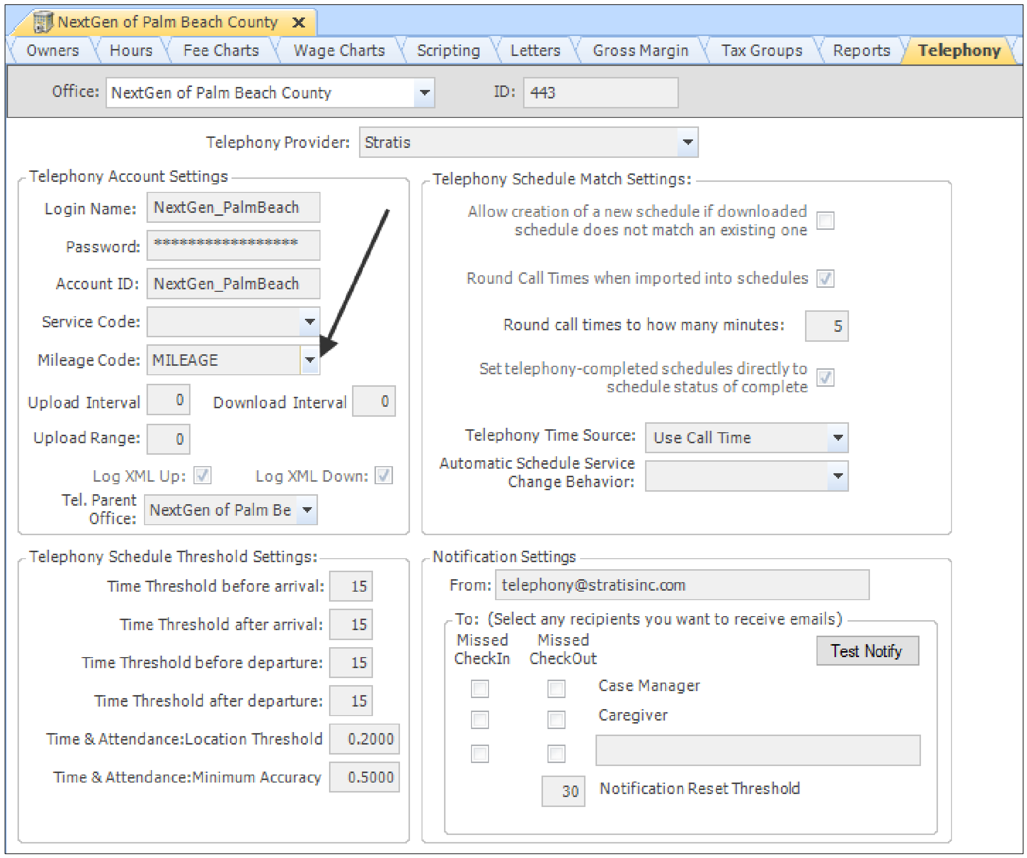


Office Record: Telephony Tab for Mileage Code

MatrixCare Home Care Mobile gives the caregiver the ability to enter the number of miles travelled. Select the Mileage expense record to be used with MatrixCare Home Care Mobile from the list of expenses in the Mileage Code drop down list.

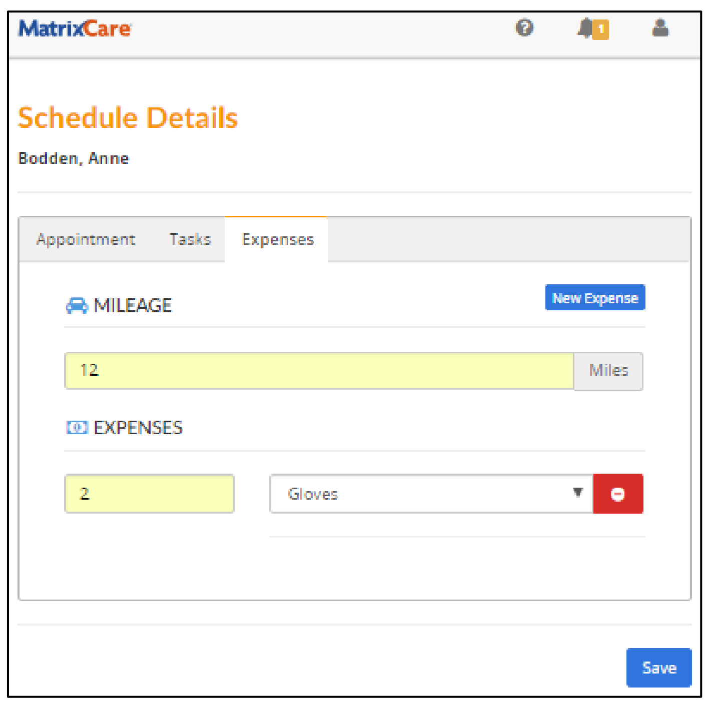
Note: If the Mileage Code is entered, it will display as a separate section on the expense's tab on the mobile schedule.

If Mileage is not selected, the Mileage will not display.



The Home Health Aide and Skilled User's will have an input field labelled "Miles", where they can enter the number of miles for the schedule, as shown. Rather than having them scroll through a list of Expenses, we map the Mileage Expense ID selected on the MatrixCare Home Care office record to the Mobile Miles field.

Note: The Office Administrator has the option to hide the "New Expenses" button for the Home Health Aide by creating a new permission group and assigning it the permission: **mycaregiver.schedule.expenses**. Then navigate to Group Users and add that permission group to non-skilled users that need to enter expenses other than mileage.

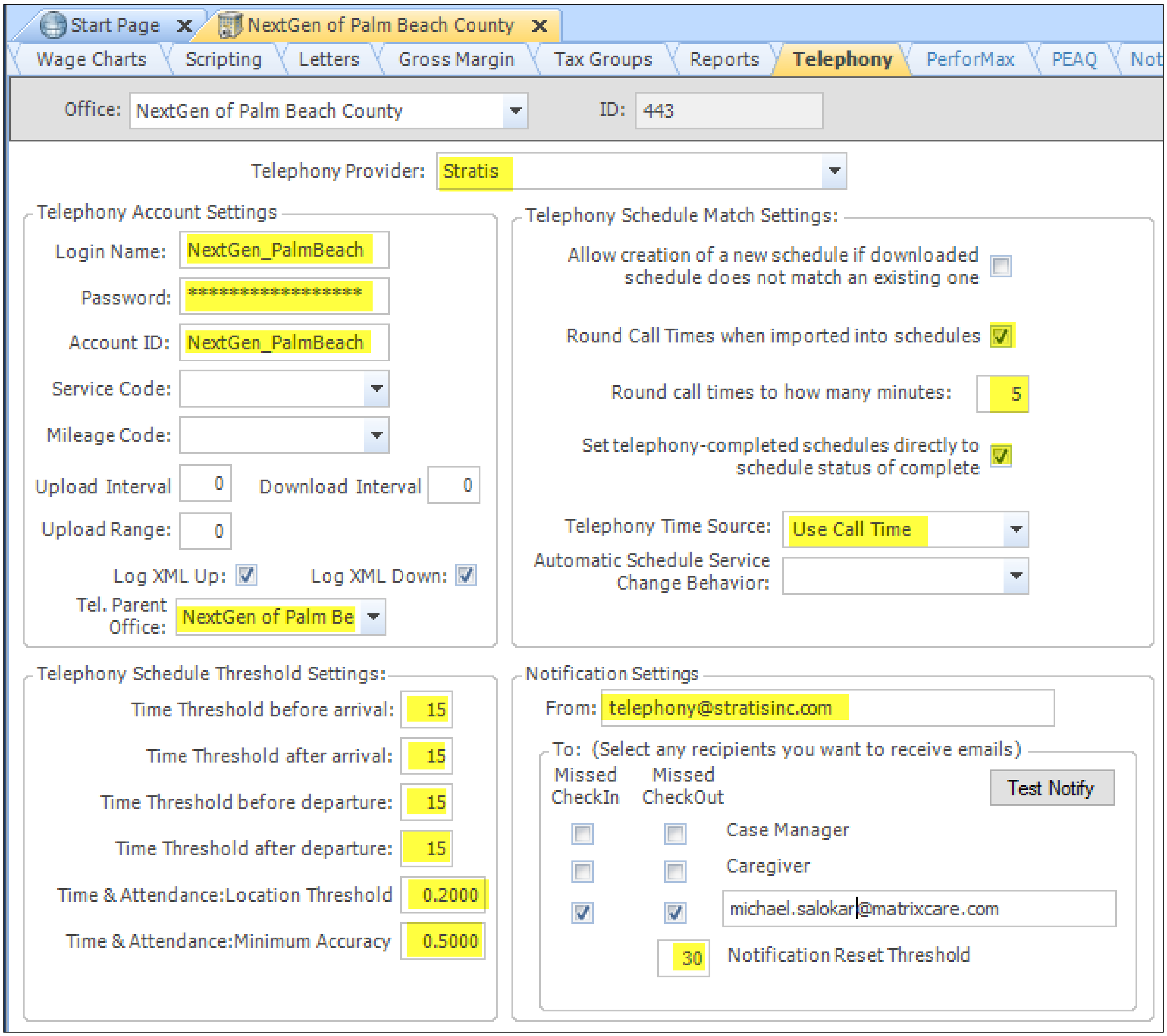


Office Record: Telephony Tab

Mobile uses the Telephony functionality which is highlighted below.

Mobile displays information concerning the threshold settings when the caregiver Checks In and Checks Out, as shown in the screen capture below.

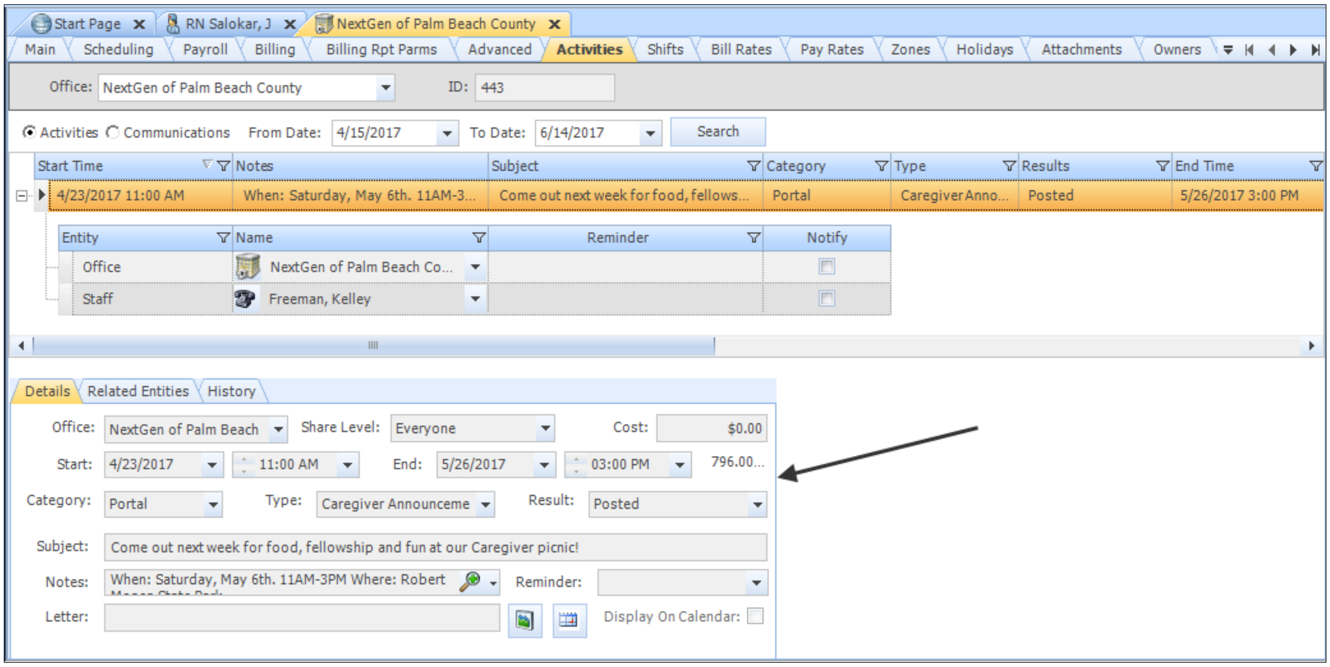
Configure the highlighted areas on the office Telephony Tab.



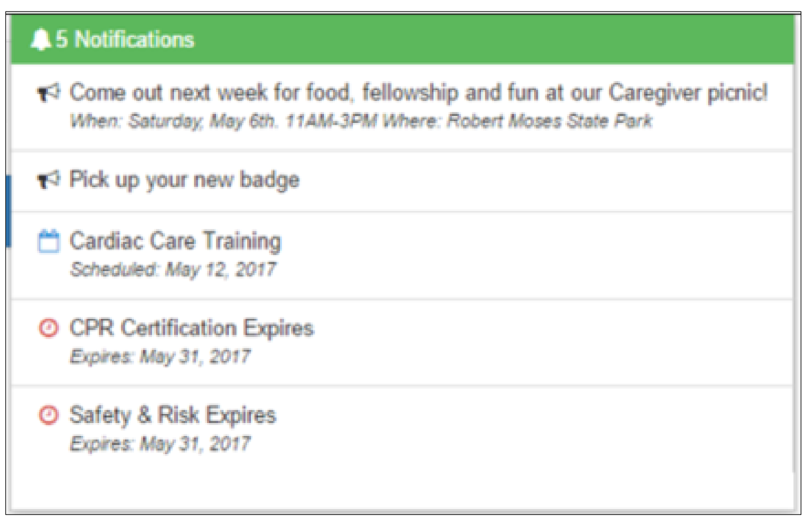
Important: If the accuracy is too concise, caregivers may need to be retrained on when to check-in and check-out on their phones. Requiring 100 feet of accuracy may lead to check-ins and check-outs showing up as incorrect.

Office Record: Portal Activities

Mobile displays the Office level Caregiver Portal Announcements, showing the Subject and Notes. The Office Activities must be created with Category = Portal, Type = Caregiver Announcement, and Result = Posted. The activity displays on MatrixCare mobile when the current date falls within the activity dates.



The Office Caregiver Portal Announcements displays in the Mobile Notifications pop-up, as shown below.



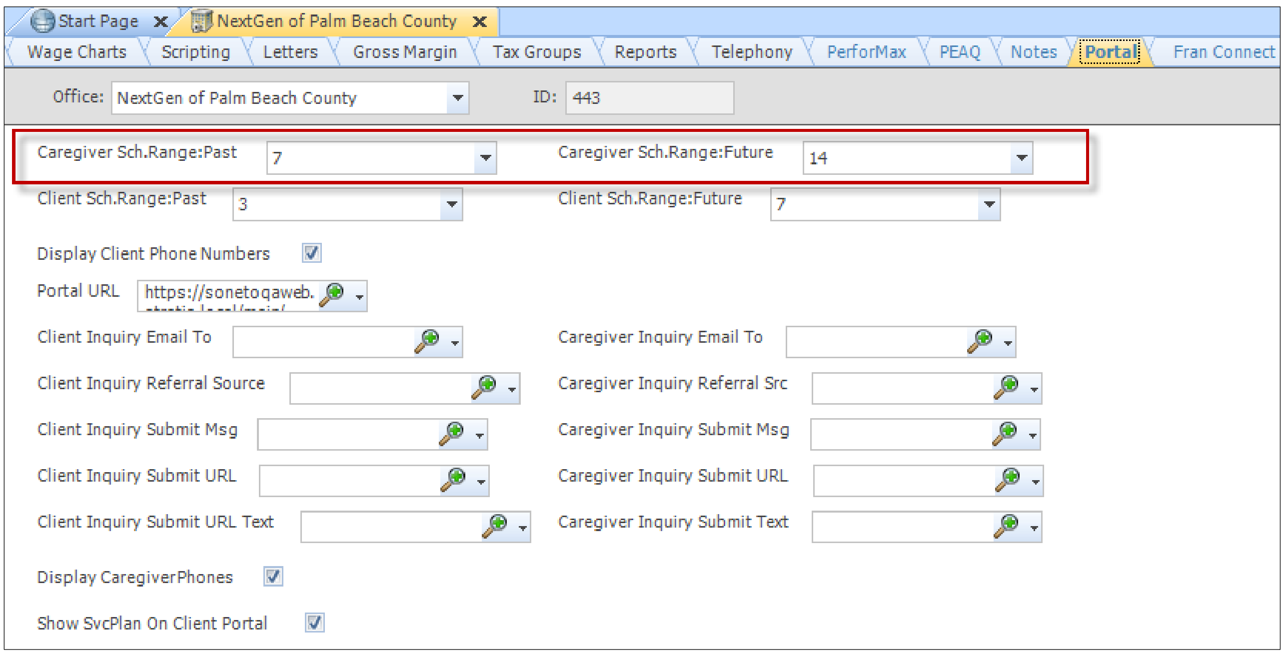
Office Record: Portal Schedule Date Range

The Home Care agency can set the date range of schedules for their Caregivers to see on their mobile devices. This allows Caregivers to effectively manage their caseloads and their expectations for a specified date range.

Note: You will need the **OfficeSettings.Portal** permission to access the Portal tab.

To change the office level setting for the Mobile schedule date range:

1. From the main menu, click **Navigation**, **Settings** then **Office** then select an Office.
2. Scroll to the right of the tabs and click the **Portal** tab.



3. You would then determine the range of **Caregiver Schedules** to display.
   - **Caregiver Sch. Range: Past** - displays Caregiver Schedules X days prior to the current date. The default is 0. The options are 0 through 30.
   - **Caregiver Sch. Range: Future** - displays Caregiver Schedules X days following the current date. The default is 7. The options are 0 through 30.

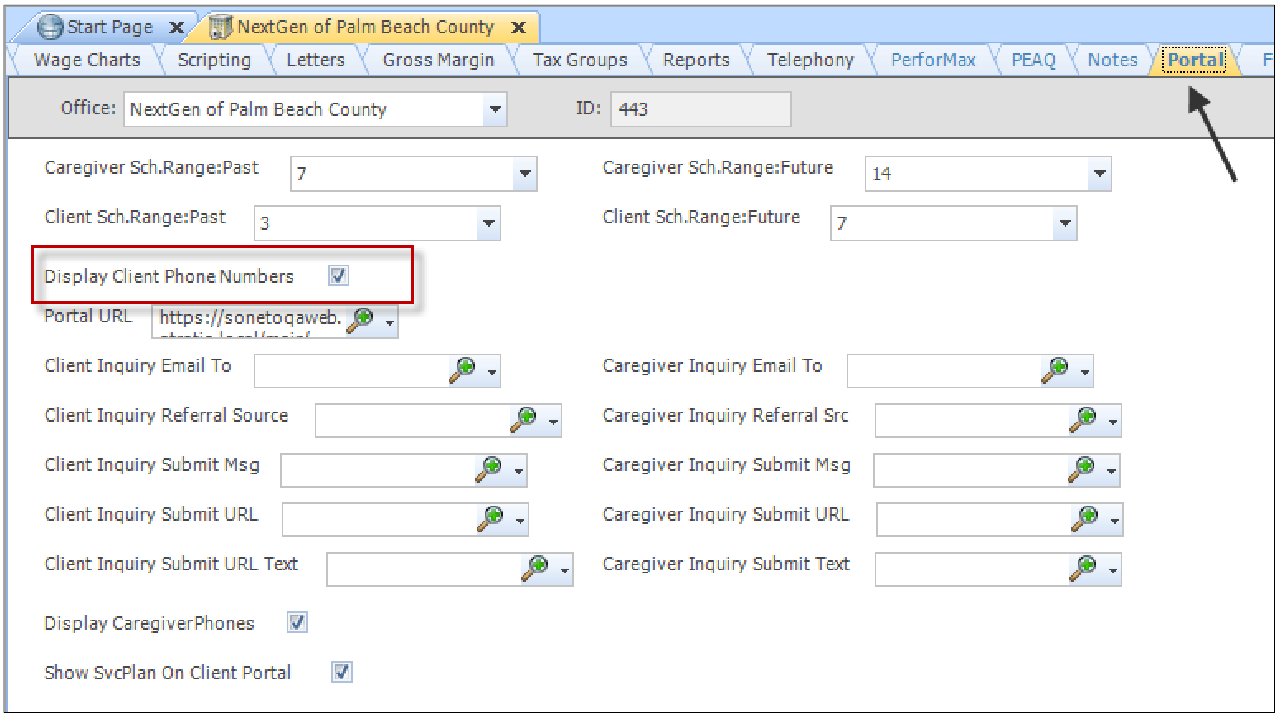
Office Record: Portal Displaying or Hiding Client's Phone Numbers

The Home Care agency can determine if they want their Caregivers to see the clients phone numbers on their mobile devices.

Note: You will need the **OfficeSettings.Portal** permission to access the Portal tab.

To change the office level setting for displaying or hiding the client's phone numbers:

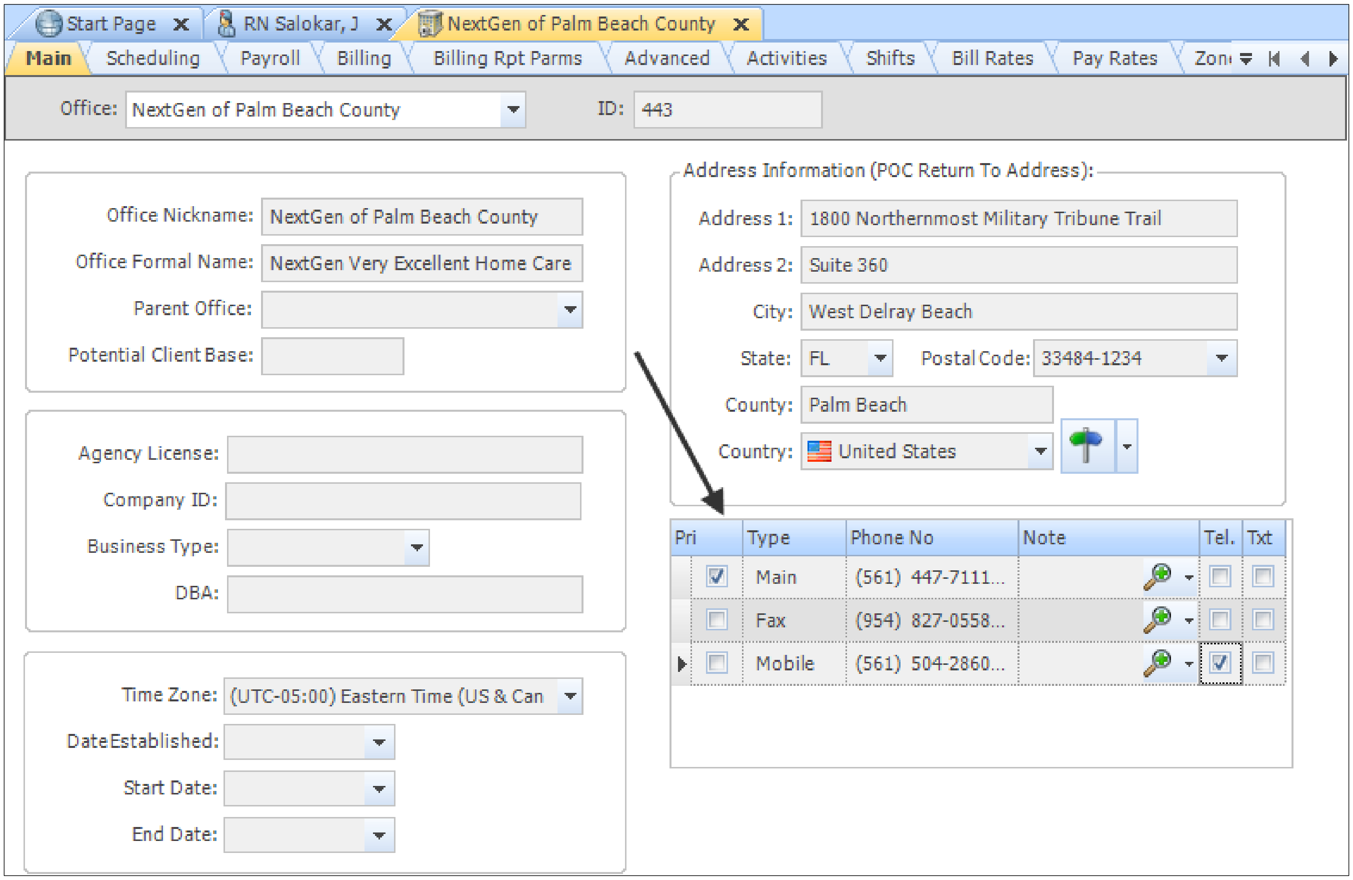
1. From the main menu, click **Navigation**, **Settings** then **Office** then select an Office.
2. Scroll to the right of the tabs and click the **Portal** tab.



- Check the **Display Client Phone Numbers** checkbox to show the clients phone numbers on the caregivers mobile devices.
- Uncheck the **Display Client Phone Numbers** checkbox to not show the clients phone numbers on the caregivers mobile devices.

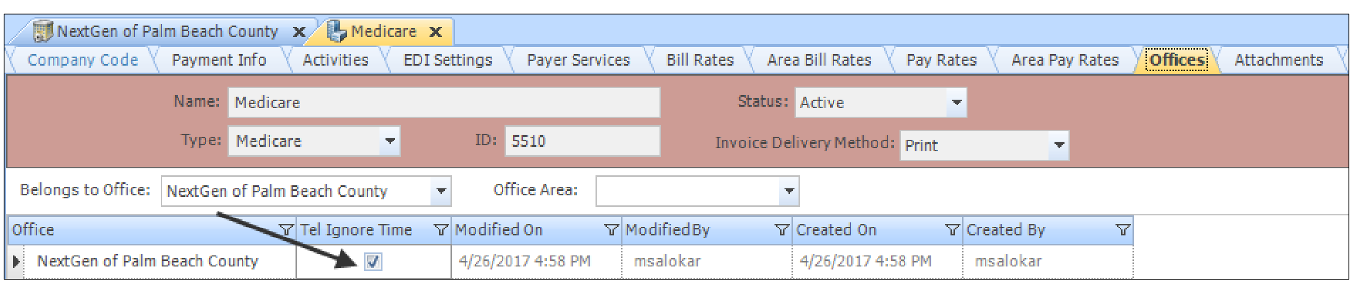
Office Record: Phone > Tel.

MatrixCare mobile uses this setting with the Missed Check in process. When set to true, the office phone number will receive telephony missed check in notifications via SMS text. Additional charges per sent text message apply here.



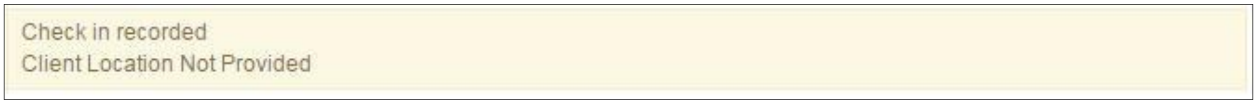
Payer Record: Tel.Ignore Time

Mobile uses this setting with the Missed Check In process. Agencies that do per visit skilled work often schedule the visits using the default 8:00-8:30 or schedule back to back 15 mins apart, knowing the visits will be made at other times that day. They don't want the Missed Check in notifications for these. This is typically true for Medicare. Set this to true if the schedules for the payer are created back to back and the office doesn't want missed notifications sent for those schedules.

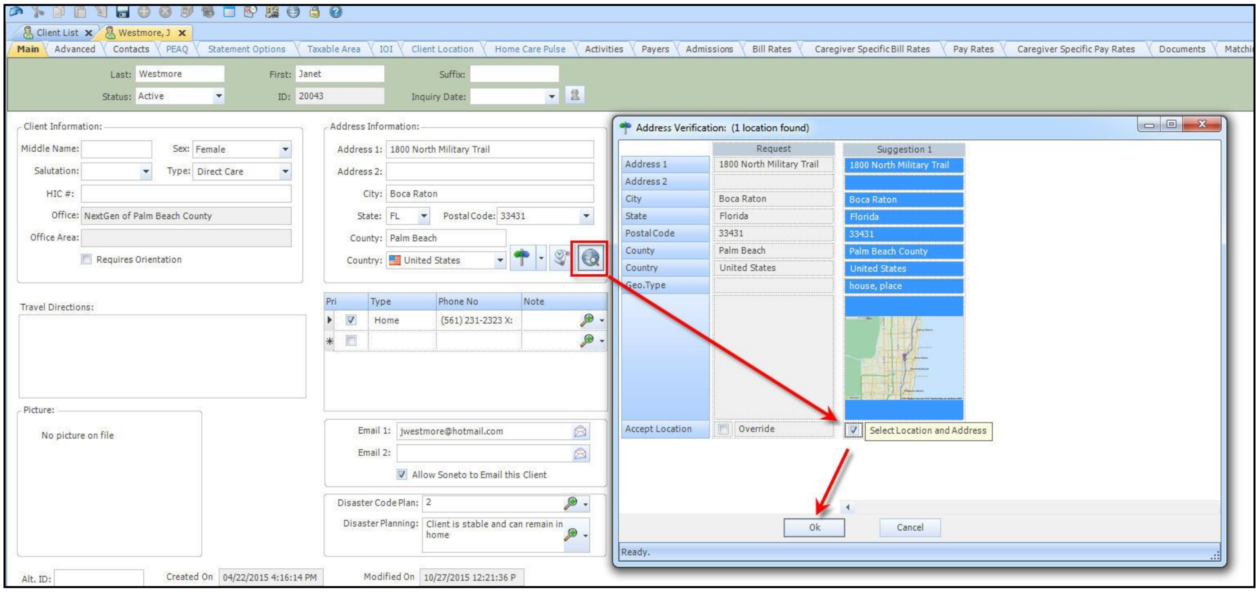


Client Records: GPS Located and Address Verify

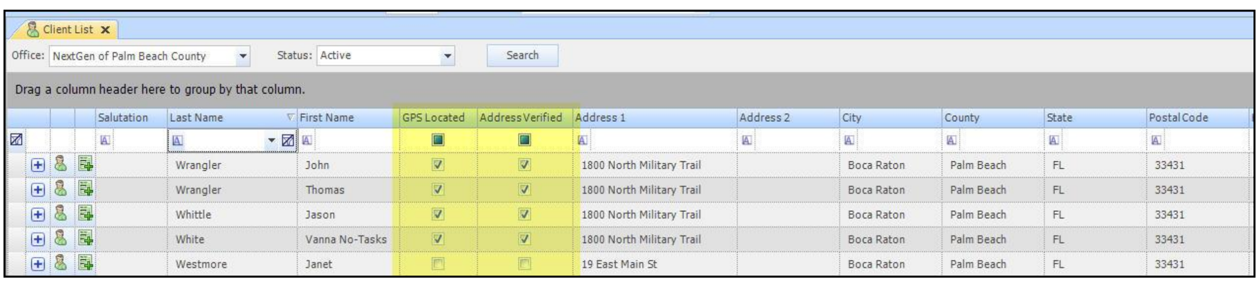
Mobile checks the GPS Location of the client's address during Check In/Check Out. If the Client's address had not been GPS Located in MatrixCare Home Care, the below information will display during MatrixCare Home Care Mobile Check In/Check Out.



GPS Locate and Address Verify the client records



Use the Client List Layout to review which clients have been verified.



Salutation	Last Name	First Name	GPS Located	Address Verified	Address 1	Address 2	City	County	State	Postal Code
	Wrangler	John	☑	☑	1800 North Military Trail		Boca Raton	Palm Beach	FL	33431
	Wrangler	Thomas	☑	☑	1800 North Military Trail		Boca Raton	Palm Beach	FL	33431
	Whittle	Jason	☑	☑	1800 North Military Trail		Boca Raton	Palm Beach	FL	33431
	White	Vanna No-Tasks	☑	☑	1800 North Military Trail		Boca Raton	Palm Beach	FL	33431
	Westmore	Janet	☐	☐	19 East Main St		Boca Raton	Palm Beach	FL	33431

DDM > HHA Categories and Caregiver Tasks UPDATED

Create HHA categories and Caregiver Tasks if the agency wants to capture Measurements.

Measurement Tasks allow the agency to capture things like blood pressure, pulse, respirations, and weight during the caregiver's visit. Future functionality will provide trending across this collected data. For example, alert the Case Manager if the client loses more than three pounds in one week.

In our example, we will create two Categories with tasks to capture measurements. If the agency captures temperature in Fahrenheit only then you don't need to create the Celsius task, and vice versa.

Category	Task Name	Measurement Type	Unit Type
Measurements	Fluid Intake	Fluid Intake	Ounces
Measurements	Fluid Output	Fluid Output	Ounces
Measurements	Weight	Weight	Pounds
Measurements	Blood Sugar Reading	Blood Glucose	mg/dL
Vital Signs	Blood Pressure (TOP)	Systolic Blood Pressure	mmHg
Vital Signs	Blood Pressure (BOTTOM)	Diastolic Blood Pressure	mmHg
Vital Signs	Respirations	Respirations	Breaths per minute
Vital Signs	Pulse	Pulse	Heartbeats per minute
Vital Signs	Temperature (F)	Temperature	Fahrenheit
Vital Signs	Temperature (C)	Temperature	Celsius

The measurement types and units are system ID values. The agency cannot create new types and units. If they ask for a type or unit we do not provide we can consider it and add it to the tables.

The agency can assign the types and units to the caregiver Tasks they create. In the example above, we will create a caregiver Task of "weight" and assign the Measurement Type of weight and the Measurement Unit of pounds to that task.

The following contains additional information on what each task is used to measure**.**

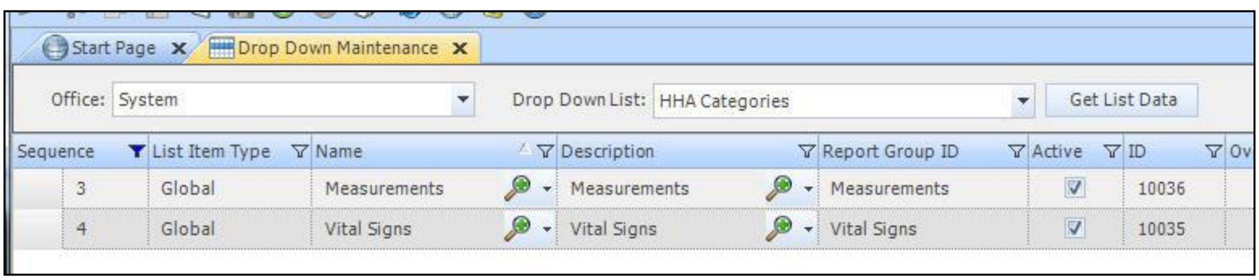
Caregiver Task Name	**Description**
Fluid Intake	Amount of fluid ingested. Notes can reflect if measured or reported.
Fluid Output	Amount of fluid expelled. Notes can reflect if measured or reported.
Weight	Notes can reflect if measured or reported.
Blood Pressure (TOP)	Systolic Blood Pressure. Normal is below 120 mm Hg. Notes can reflect if taken using blood pressure cuff.
Blood Glucose	Amount of glucose in the blood. Normal is 70-160 depending on the individual and if the bs is fasting or not.
Blood Pressure (BOTTOM)	Diastolic Blood Pressure. Normal is below 80 mm Hg. Notes can reflect if taken using blood pressure cuff.
Respirations	Normal is 12-20 breaths per minute. Notes can reflect if taken counting chest rise/fall or breaths heard.
Pulse	Tachycardia (above 100 beats/minute), bradycardia (below 60 beats/minute). Notes can reflect if taken at neck, inside elbow, wrist, groin, behind knee, ankle joint and foot.
Temperature (F)	Fahrenheit. Notes can reflect if taken orally or under armpit.
Temperature (C)	Celsius. Notes can reflect if taken orally or under armpit.

DDM > HHA Categories

Create the Categories for the tasks. In our example, we created two categories:

- Measurements and Vital Signs

Important! Remember to create Reports Groups and assign them to the Categories.

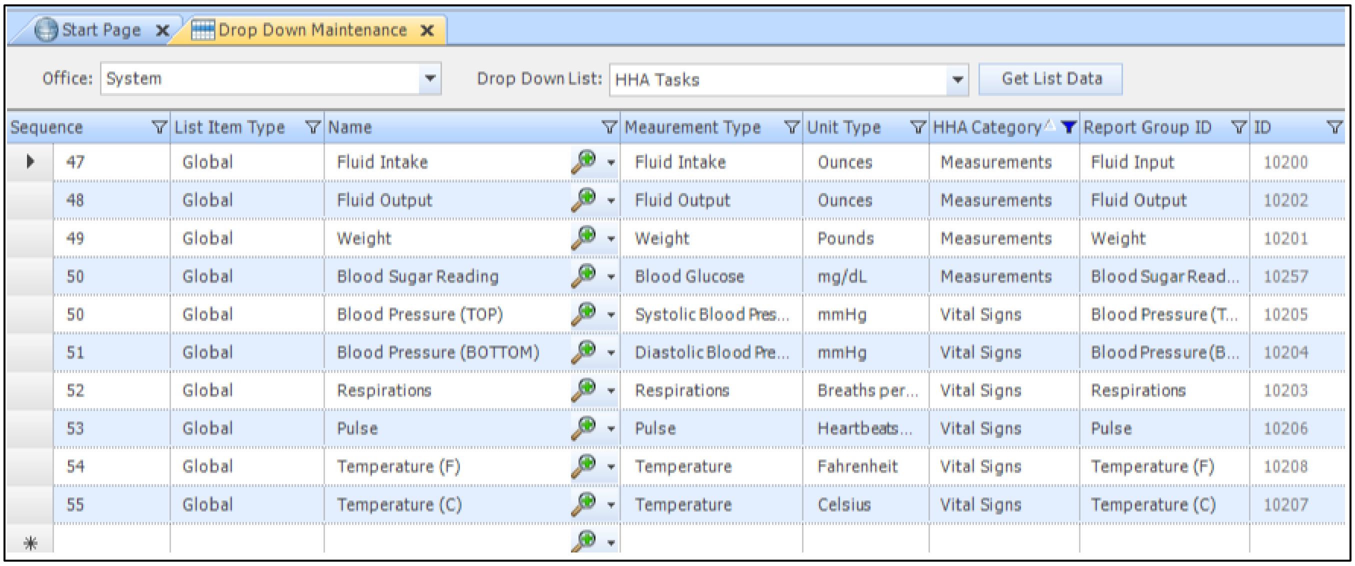


DDM > HHA Tasks

Create the Tasks, assigning them to the appropriate Category and selecting the appropriate Measurement Type and Unit Type.

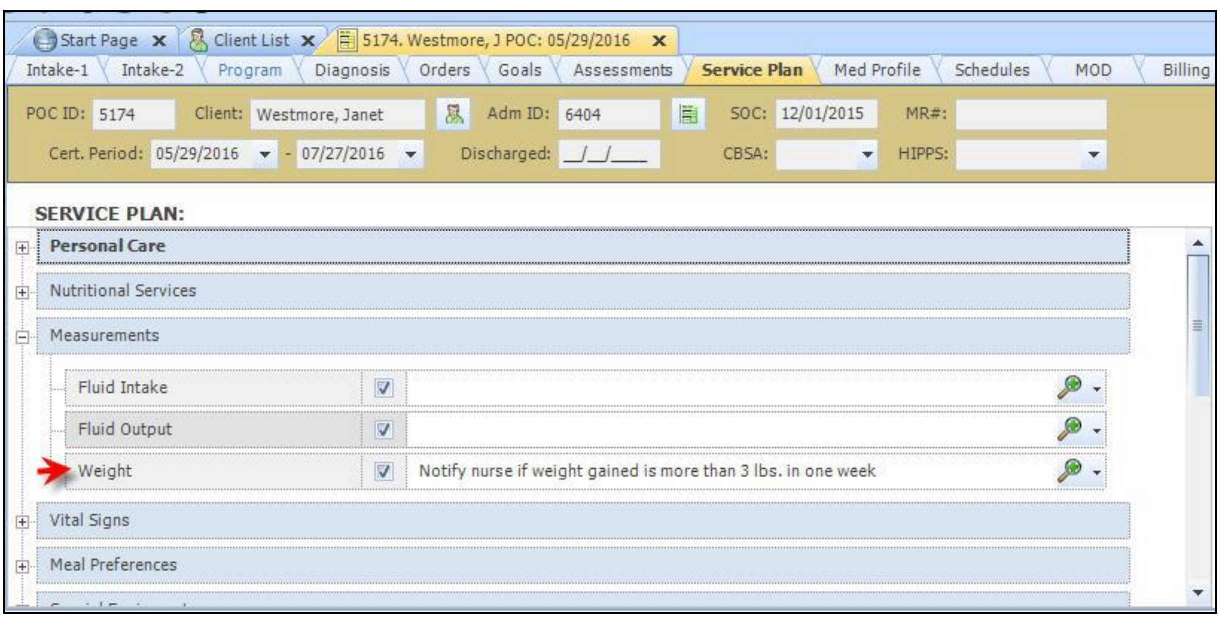
Important! Configure the Measurement Type and Unit Type correctly.

For example, you do not want to configure “Weight“ to use “Breaths per minute.” Create Report Groups and assign them to the Tasks.



Sequence	List Item Type	Name	Meaurement Type	Unit Type	HHA Category	Report Group ID	ID
47	Global	Fluid Intake	Fluid Intake	Ounces	Measurements	Fluid Input	10200
48	Global	Fluid Output	Fluid Output	Ounces	Measurements	Fluid Output	10202
49	Global	Weight	Weight	Pounds	Measurements	Weight	10201
50	Global	Blood Sugar Reading	Blood Glucose	mg/dL	Measurements	Blood Sugar Read...	10257
50	Global	Blood Pressure (TOP)	Systolic Blood Pres...	mmHg	Vital Signs	Blood Pressure (T...	10205
51	Global	Blood Pressure (BOTTOM)	Diastolic Blood Pre...	mmHg	Vital Signs	Blood Pressure (B...	10204
52	Global	Respirations	Respirations	Breaths per...	Vital Signs	Respirations	10203
53	Global	Pulse	Pulse	Heartbeats...	Vital Signs	Pulse	10206
54	Global	Temperature (F)	Temperature	Fahrenheit	Vital Signs	Temperature (F)	10208
55	Global	Temperature (C)	Temperature	Celsius	Vital Signs	Temperature (C)	10207

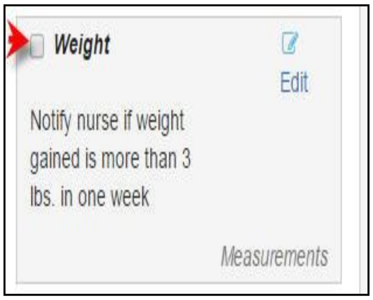
The task would be assigned to the Client’s Plan of Care Service Plan tab.

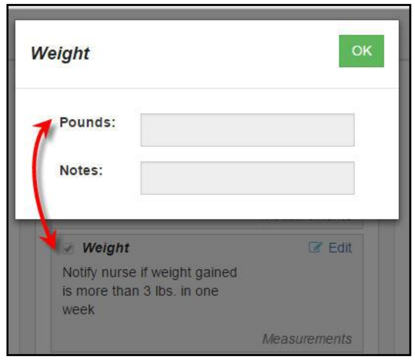


Selecting service plan items, makes them available on the Tasks Tab of the MatrixCare Home Care Mobile schedule.

Important!: If you are using the mobile Plan of Care Service Plan versioning process, you must Publish the Draft Service Plan. Once the service plan is published, the information will display on a mobile device.

Checking the tasks box to check each of the Tasks as they are performed opens a pop-up where the Caregiver can enter the measurement value and notes, as applicable.



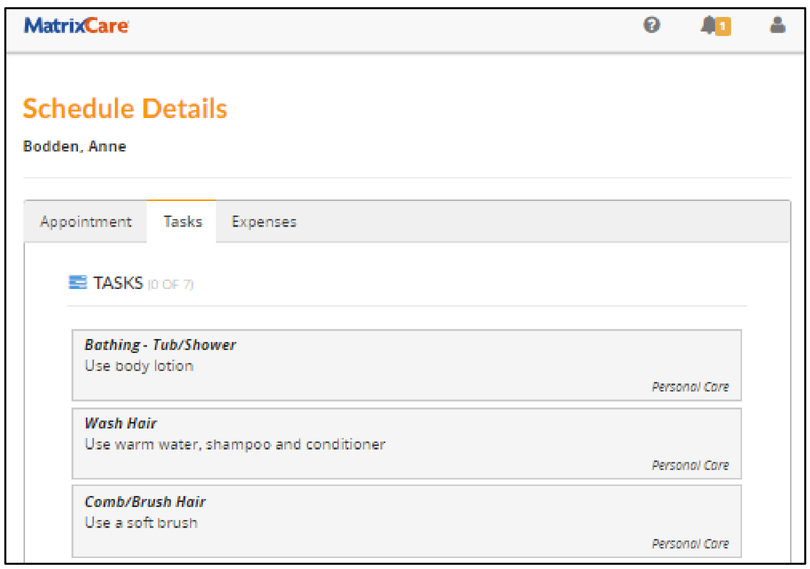


Plan of Care Records: Service Plan Tasks

MatrixCare Home Care Mobile uses the assigned Plan of Care Service Plan Tasks, as shown above. When the schedule falls within a Plan of Care Cert Start/End dates and the Plan of Care has assigned Service Plan Tasks, then those tasks will be available on the Caregiver's Schedule Tasks Tab.

Tasks are displayed by Task Name, sorted per the Sequence assigned in DDM > HHA Categories and then DDM > HHA Tasks, as shown below.

In our example, Shower is the Task Name and Personal Care is the Task Category.



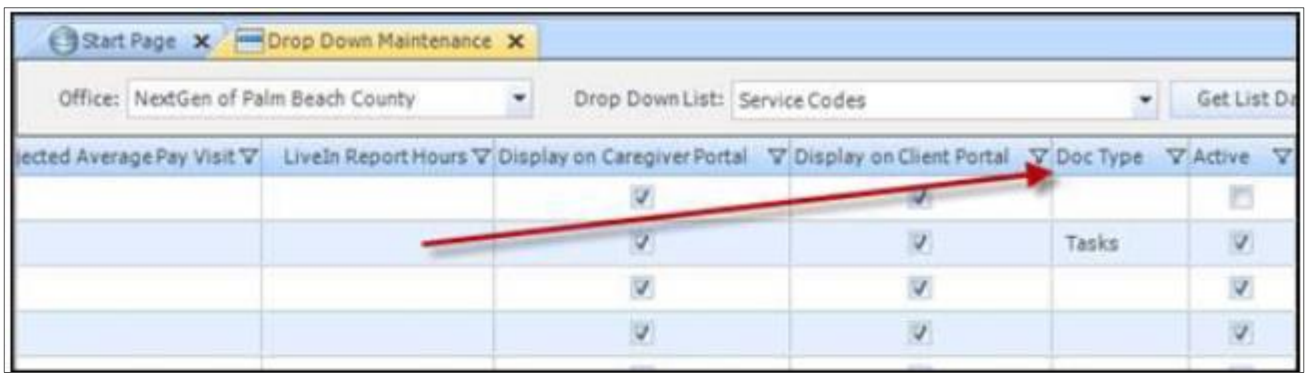
Setting Up Doc Type Service Codes Categories

The MatrixCare Home Care back office system provides a column heading in the Drop Down Maintenance Service Codes section called **Doc Type**. This setting is used with MatrixCare Home Care Mobile to determine screen options displayed for schedules on mobile devices. The field is populated on Service Code Category entries. Possible values are Tasks or Forms. The default setting is Tasks. Service code and expense entries will display blank in this field.

- Service codes assigned to Service Code Categories where Doc Type is set to **Tasks** will display a Task tab on the schedule details page on your mobile device. This option is used for services HHA's would perform, providing them the ability to complete assigned Tasks during their visits.
- Service codes assigned to Service Code Categories where Doc Type is set to **Forms** schedule will display an Admissions tab instead of a Task tab on the schedule details page on your mobile device. This option is used for services that a Nurse (skilled disciplines) would perform.

To view the Doc Type column in the Drop Down Maintenance service code list:

1. From the main menu, click **Navigation**, **DB Maintenance** then **Drop Down Maintenance**.
2. Select your office and in the Drop Down List select **Sevice Codes**.
3. Click **Get List Data**.
4. Scroll all to the way to the right to find the Doc Type column.

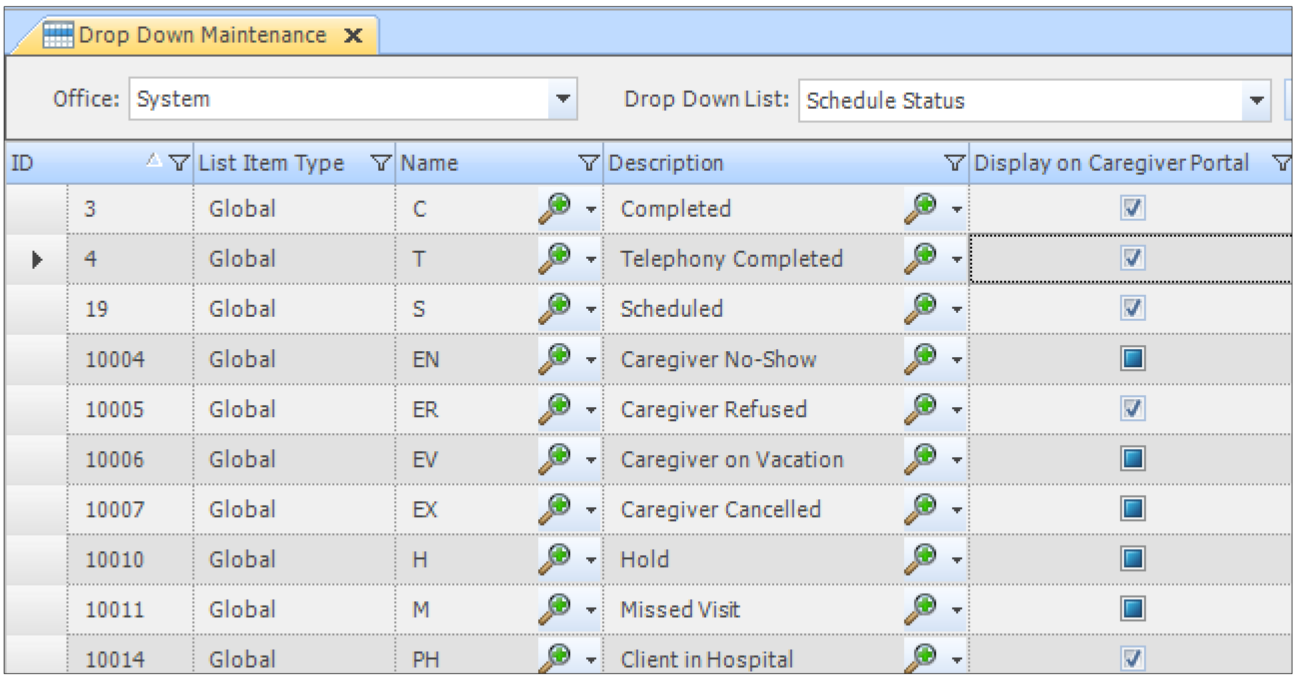


Schedule Status Settings in Drop Down Maintenance

The Home Care agency can now determine which schedule status' should be shown on the caregiver's mobile device so that caregivers do not see schedules that they should not perform.

To view and modify the Display on Caregiver Portal check box on the Schedule Status table:

1. From the main menu, click **Navigation**, **DB Maintenance**, **Drop Down Maintenance** then **Office** then select an Office.
2. In the Drop Down List, select **Schedule Status**.
3. In the Schedule Status table, scroll to the right to view the **Display on Caregiver Portal**.



The default is checked on the System ID records S (Scheduled), C (Completed), and T (Telephony Completed).

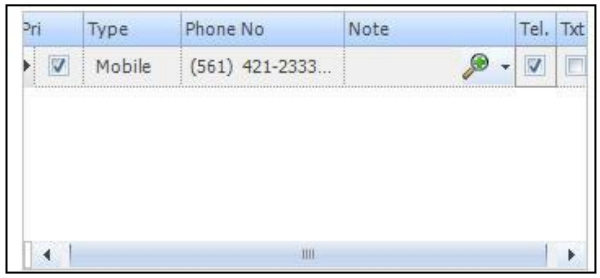
- When the box is checked, the schedule is displayed.
- When the box is unchecked, the schedule is not displayed.

Caregiver Records: Missed Visit Notifications

Phone > Tel.

Mobile uses this setting with the Missed Check In process.

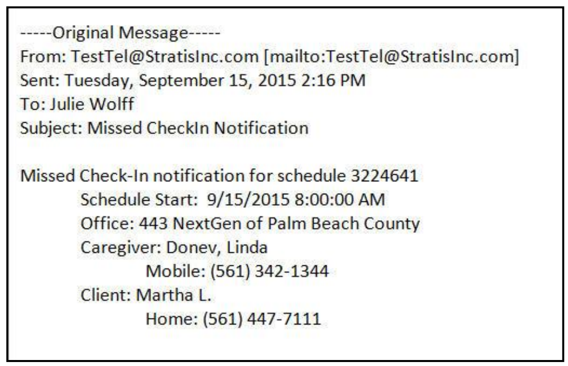
If the caregiver or staff is going to receive missed check in notifications via SMS text message, the phone number must be a valid phone number and the “Tel” box must be checked. Additional charges per sent text message apply here.



Email 1

Mobile also uses this setting with the Missed Check In process. If the caregiver or staff is going to receive missed check in notifications via email, enter a valid address in the email field(s) and check the “Allow Soneto to Email This Caregiver”.

Example of Missed Check In Notification, sent to the Caregiver via email.


-----Original Message-----
From: TestTel@StratisInc.com [mailto:TestTel@StratisInc.com]
Sent: Tuesday, September 15, 2015 2:16 PM
To: Julie Wolff
Subject: Missed CheckIn Notification

Missed Check-In notification for schedule 3224641
Schedule Start: 9/15/2015 8:00:00 AM
Office: 443 NextGen of Palm Beach County
Caregiver: Donev, Linda
Mobile: (561) 342-1344
Client: Martha L.
Home: (561) 447-7111

Back Office User Permissions

The following are permissions used in the back office.

Mobile Permission Group Assignment Process for On Call Scheduler

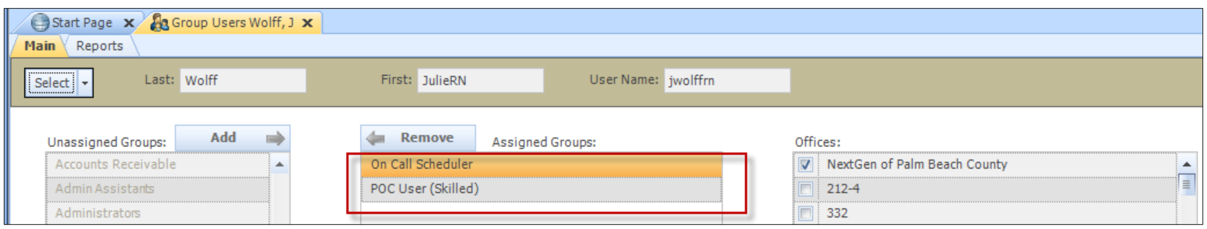
Back Office users can access all clients for their office(s) on a mobile device. The “On Call Scheduler” permission group will allow your Supervisors and Schedulers read access to the client’s mobile record, which includes viewing the client’s schedules, service plans, and forms.

Note: Future functionality will include adding and editing schedules.

On Call Scheduler Permissions

Back Office staff, that also performs client visits, can be assigned the “On Call Scheduler” permission group, in addition to their existing POC User (Skilled) or POC User (Non-Skilled) permission groups.

These users will see the existing tiles for “My Schedules”, “My Clients” and “Forms in Progress”; along with the new tile for “Clients”.



When logging into the Mobile device, the following tiles will appear for a mobile user with the above permission groups.

On Call Scheduler:

- Forms in Progress
- Clients
- Caregivers

Skilled Professional User:

- My Schedule
- Forms in Progress
- My Clients

Create Users - Mobile Permission Groups for Skilled and Non Skilled

To use the Create New Users feature, the caregiver record must have a skill category assigned, and the skill category must have a permission group assigned.

The Skill Category is assigned a permission group in Drop Down Maintenance.

The Caregiver record can be assigned a Skill Category directly in the Caregiver record, or on the User Setup page in the Create New Users process.

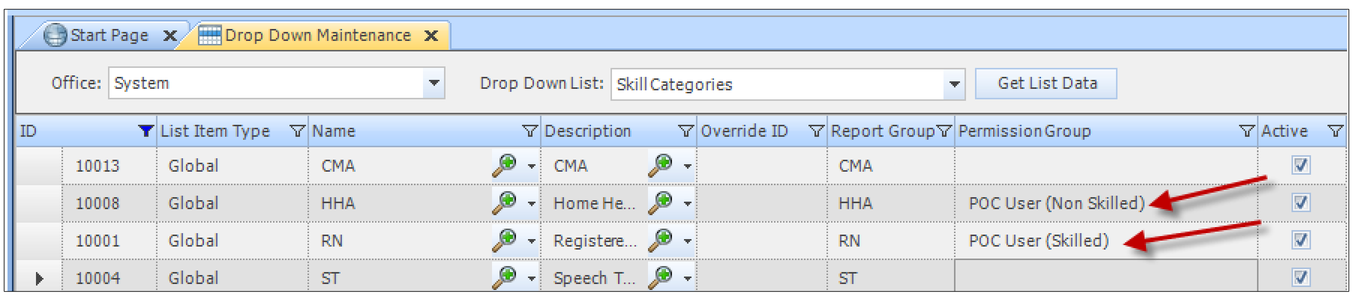
Currently the following permissions groups can be assigned to a skill category:

- POC User (Non Skilled)
- POC User (Skilled)

Note: This enables an office to use the Create Users feature for Nurses as well as Home Health Aide's. Review your Skill Categories and set either the POC User (Non Skilled) or POC User (Skilled) permission group on the appropriate records.

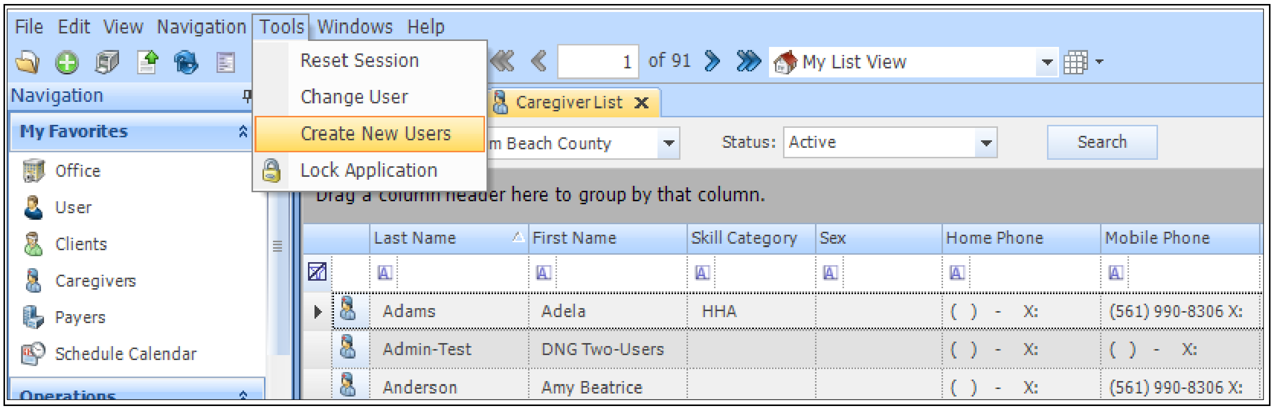
To view the Permissions Group column in the Drop Down Maintenance Skill Categories list:

5. From the main menu, click **Navigation**, **DB Maintenance** then **Drop Down Maintenance**.
6. Select your **Office** and in the Drop Down List select **Skill Categories**.
7. Click **Get List Data**.
8. Find the Permission Group column. Modify and select the appropriate **Permission Group** for the Skill Category and save your changes.

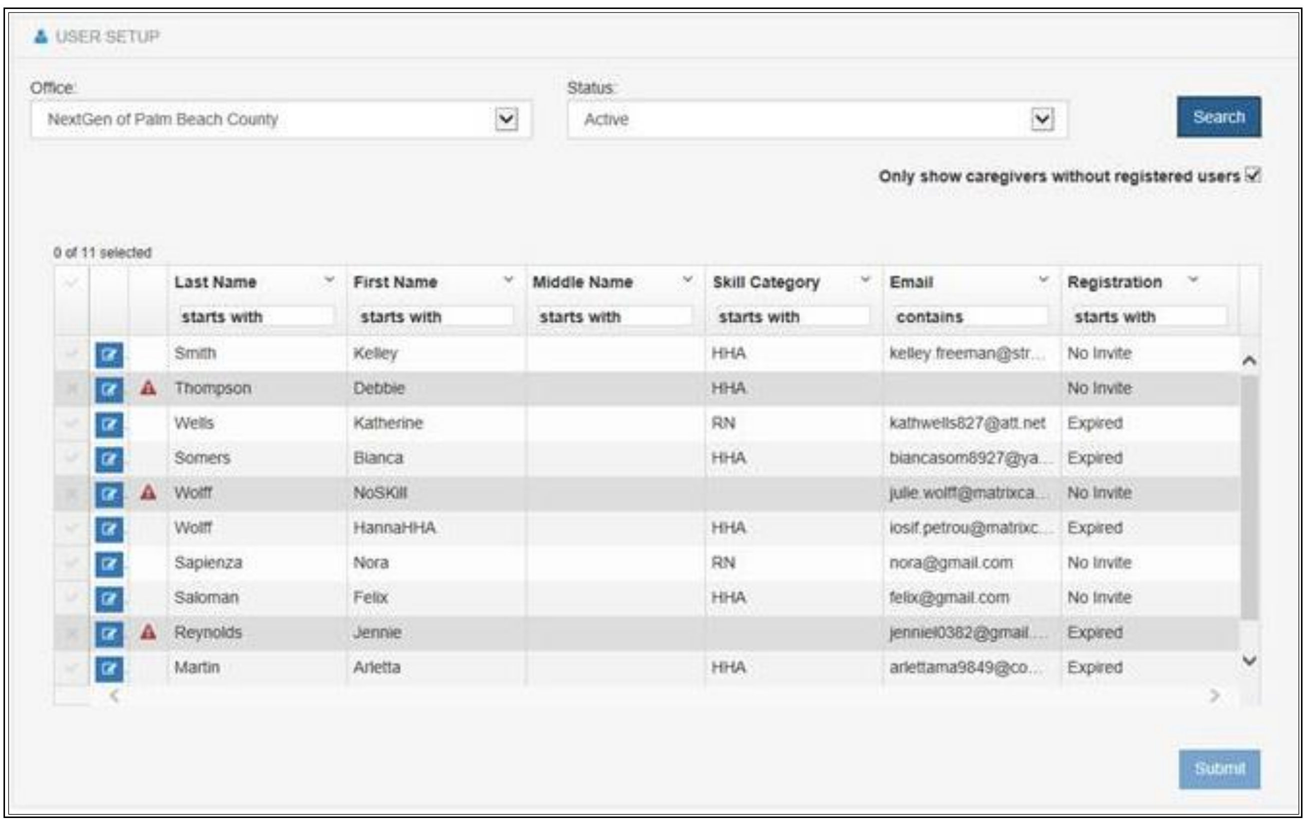


To view the Create Users page to view Skill Categories list from the caregiver's record:

1. From the Caregiver list, click the **Tools** menu, and select **Create New Users**. (You must have the **Admin.CreateNewUsers** permission to access this feature.)

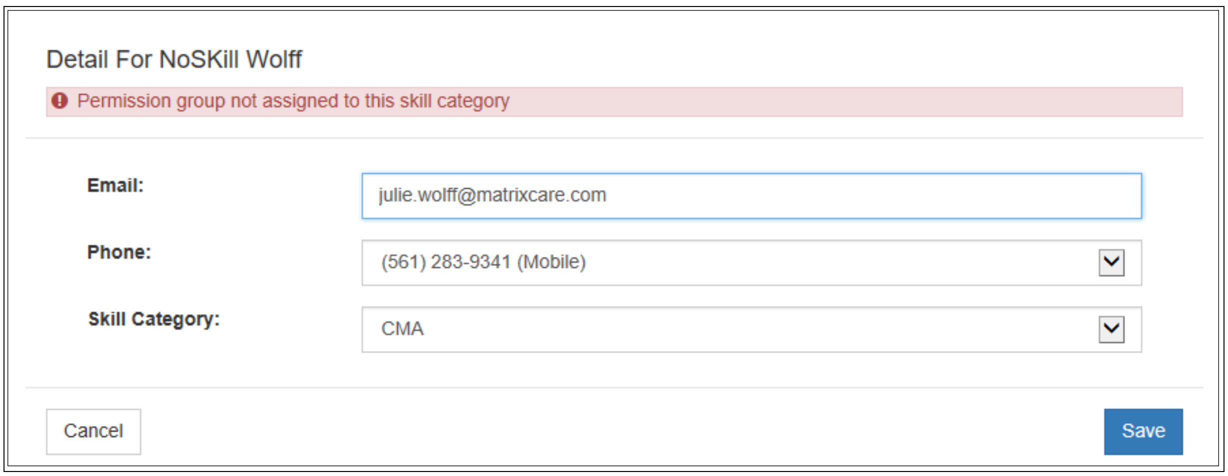


The information in the Skill Category column when creating a new user is the same information that displays in the User Setup page in the Skill Category column. The Skill Category information is coming from the caregiver's record.



The Skill Category is now required for the Create User/User Setup feature. When selecting a caregiver that does not have a Skill Category assigned, the below validation will display in a pop-up window. Use the Skill Category drop down to add a Skill Category to the caregiver's record.

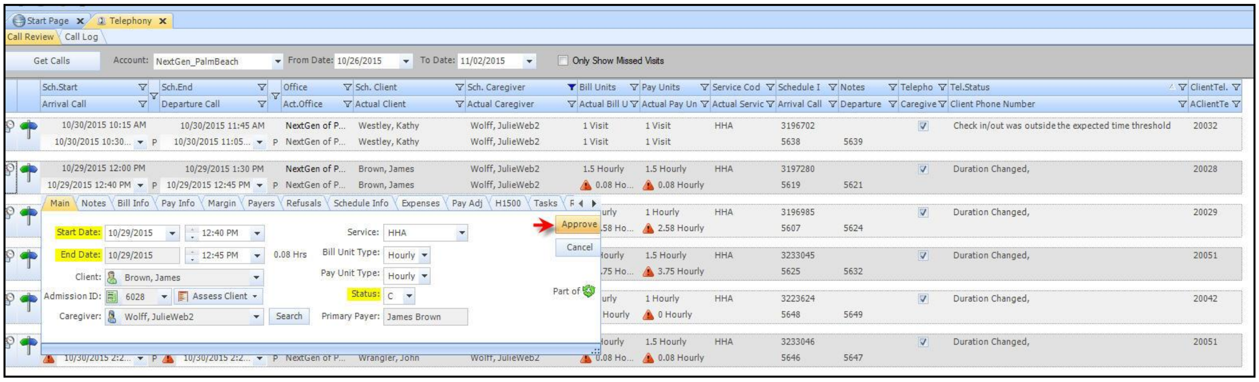
If the Skill Category does not have a Permission Group assigned, the error message “Permission group not assigned to this skill category” will display in red. Press **Cancel** to close the pop-up window. Assign a permission group to the Skill Category.



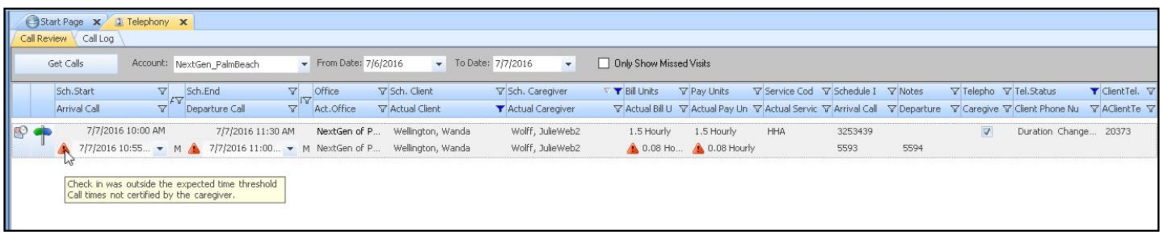
Telephony and Schedule Task Permissions

Mobile uses settings on the Telephony Tab of the office record. The back office Office Admin will need edit permission to Office Settings and OfficeSettings.Telephony.

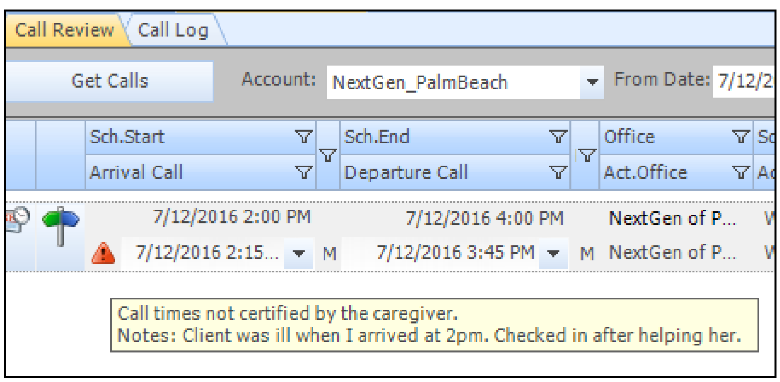
Mobile uses Telephony for Check In/Check Out functionality. Back office users will need permission to Telephony to access the Telephony Call Review. They must also have permission to the parent office of the Telephony account. And they need edit permission to Schedule and Schedule.Telephony to Approve schedules with Tel. Status warnings.



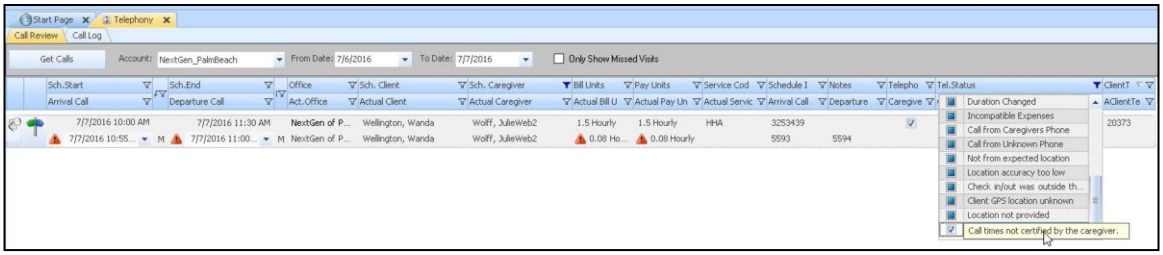
On the Call Review tab, the following tool tip information is shown.



Notes from the caregiver show in the tool tip area.



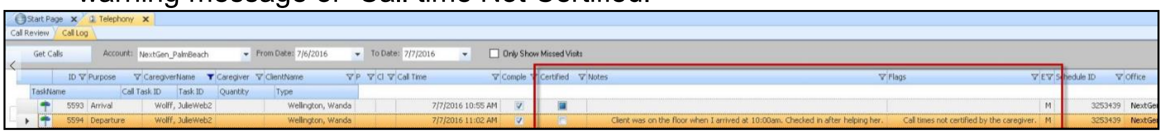
A warning message appears “Call Times not certified by the caregiver.” The warning message is on the Telephony Status column so a user can filter on it.



Click the **Call Log** tab.

On the Call Log tab, the following new columns are available in the Telephony Call Log form:

- **Certified** - If the caregiver answers **Yes** to "Certify Visit Times." The form displays as checked. If the caregiver answers **No** to "Certify Visit Times." The form displays as unchecked.
- **Notes** - If a caregiver enters notes, they will display in the Notes column.
- **Flags** - If the caregiver answers **No** to "Certify Visit Times." The "Call times not certified by the caregiver" warning message displays. Notes will display in the Tool Tip with the warning message of "Call time Not Certified."

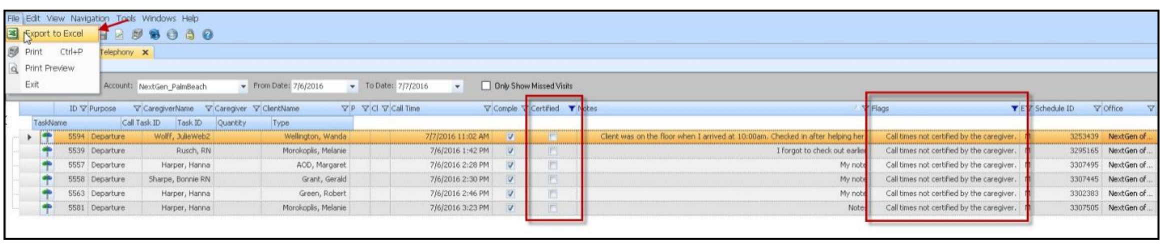


The user can filter the Certified column (false = no) and the Flags column (for Call Times not certified by the caregiver) and export the list to excel file.

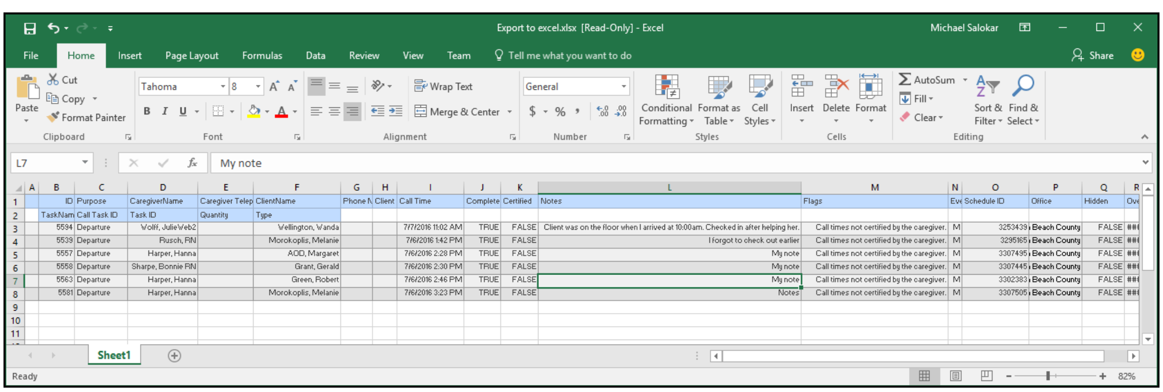
Exporting Telephony Call Log form to an Excel File

To Export the Telephony Call Log form to an Excel file:

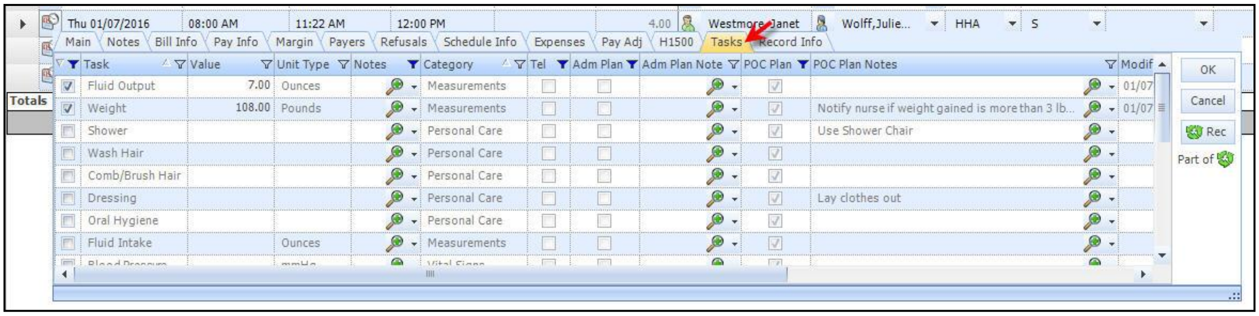
1. From the main menu, click **File**, **Export to Excel,** in the Save As window, type a file name and click **Save.**



2. Browse to the saved Excel file and double click it to open the file.



Mobile Tasks will be available on the Tasks Tab of the schedule. Back-office users will need permission to Schedule.Tasks, Schedule.Tasks.C to access the Tasks Tab of schedules.

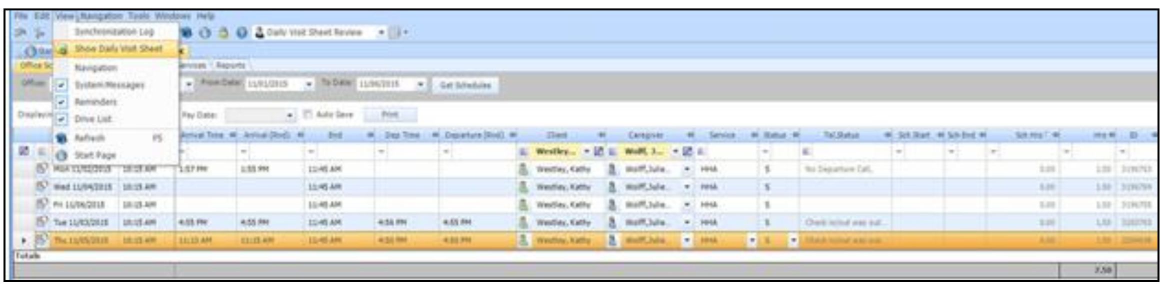


Daily Visit Sheet Report Permissions

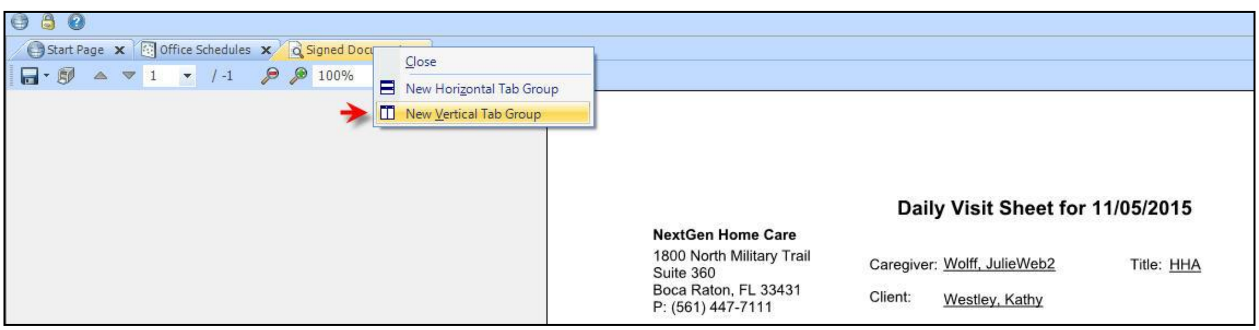
Mobile creates a versioned .pdf during the Home Health Aid and Skilled Users check out process. The HHA's report includes the Tasks assigned and the Tasks completed, the client signature, the caregiver's digital signature, and the Check In/Check Out times. The Skilled User's Report does not include tasks. Back-office users will need permission to rptDailyVisitSheet to run the report.

Office Schedules - View/Print the report per schedule

Daily Visit Sheets are run from Office Schedules. Users can create a custom layout, filter the schedules grid, and then select the "Daily Visit Sheet" option in the View menu.



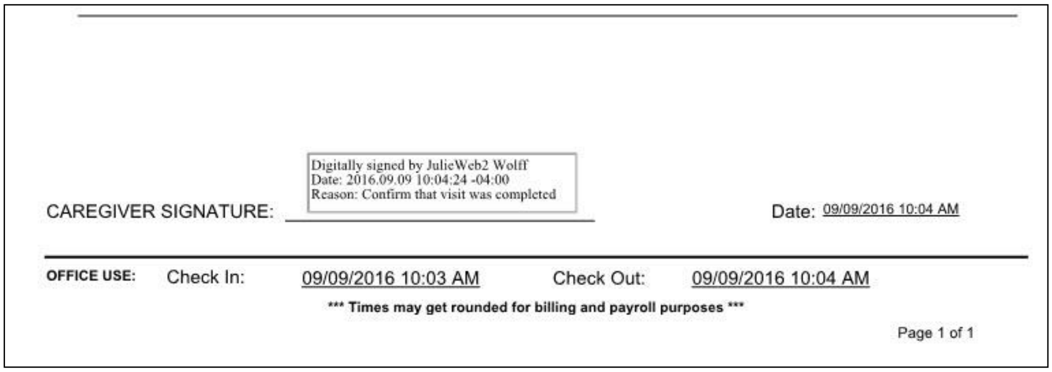
The report for the highlighted schedule row will load. The user should apply a vertical split screen, by right clicking on the Report Tab and selecting the "New Vertical Tab Group" option.

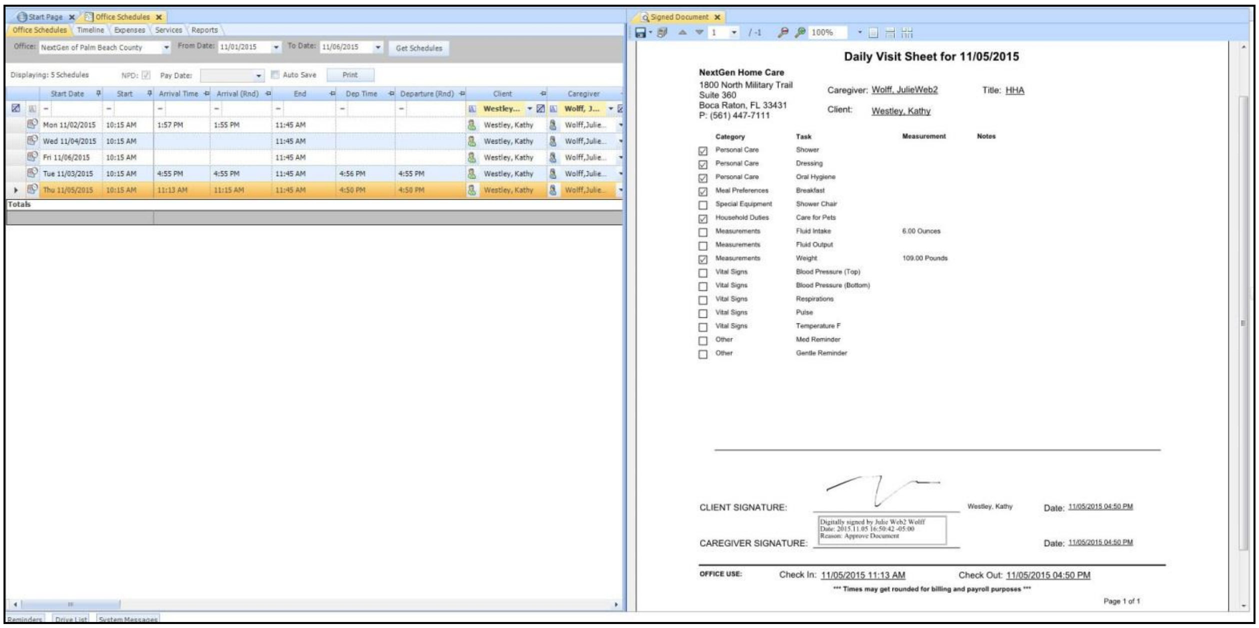


This will allow them to view the report that corresponds to the schedule they are looking at. From here, they can check the content of the report to the schedule, checking for things like times.

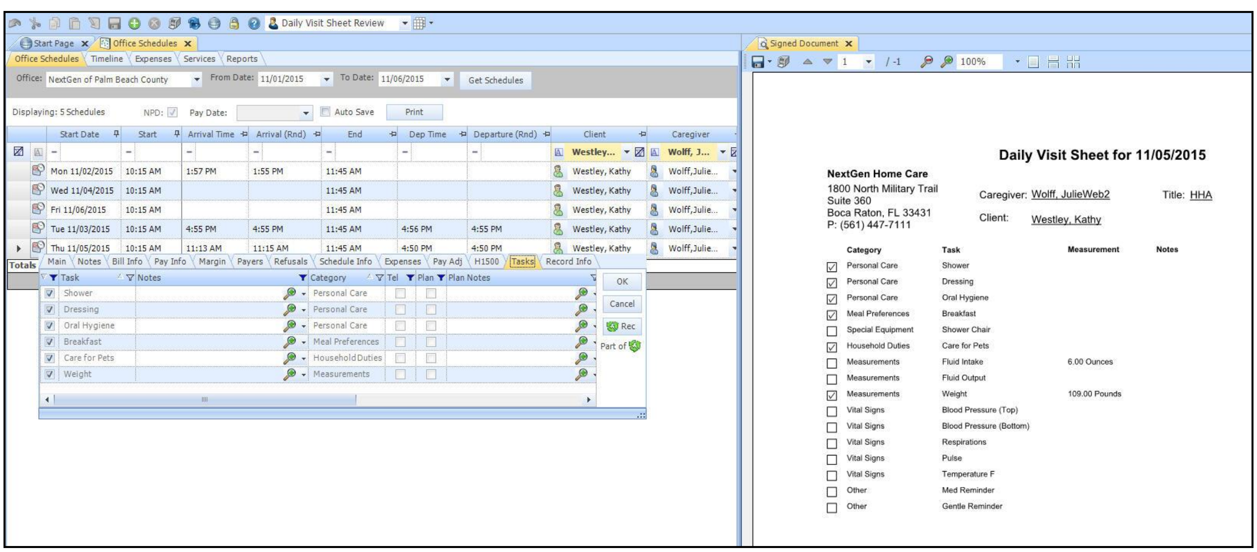
If the client or caregiver chooses to skip signing during checkout the signature lines on the Daily Visit Sheet will be hidden.

Example: Daily Visit Sheet that the caregiver signed but the client skipped signing.





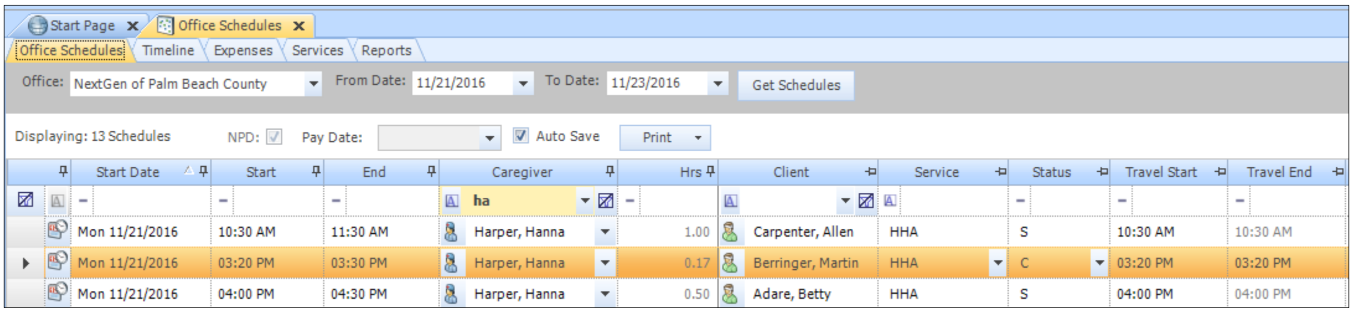
They can also open the schedules' Task Tab and check the Tasks.



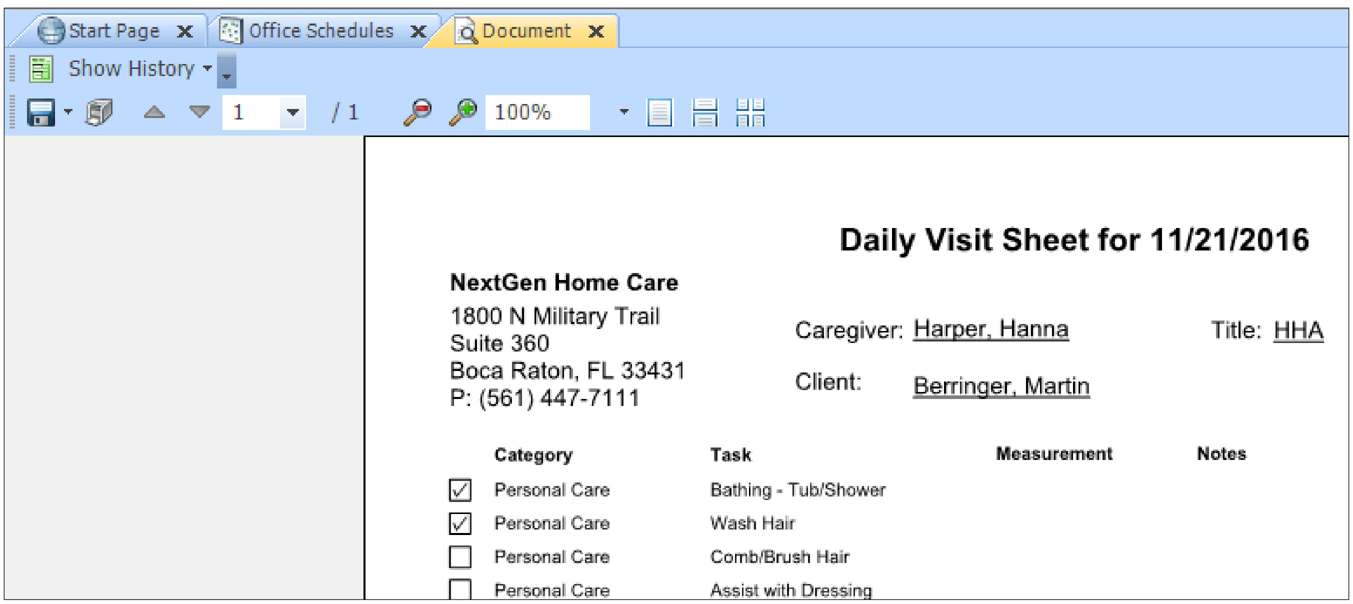
Note: If the back-office user modifies the schedule, then a NEW versioned report would be needed to include the changes. The changes to the schedule would be seen by the Caregiver on Mobile, and the Caregiver would go back to the client on their next visit and have the client sign again for the previous visit. This would create a second, versioned, .pdf for that visit. When running the report from Office Schedules, the most current version of the report is returned.

To access an older versioned report for a schedule:

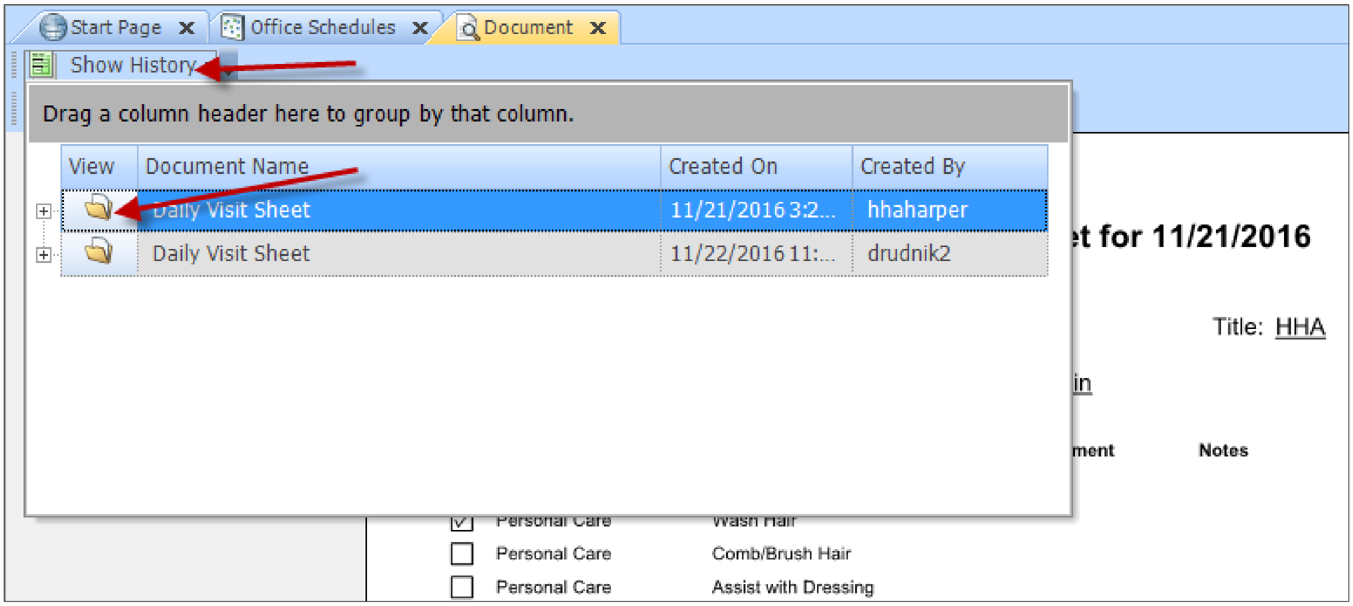
1. On **Office Schedules** tab, select the row for the schedule.



2. On the main menu, click **View** then select **Show Daily Visit Sheet**.

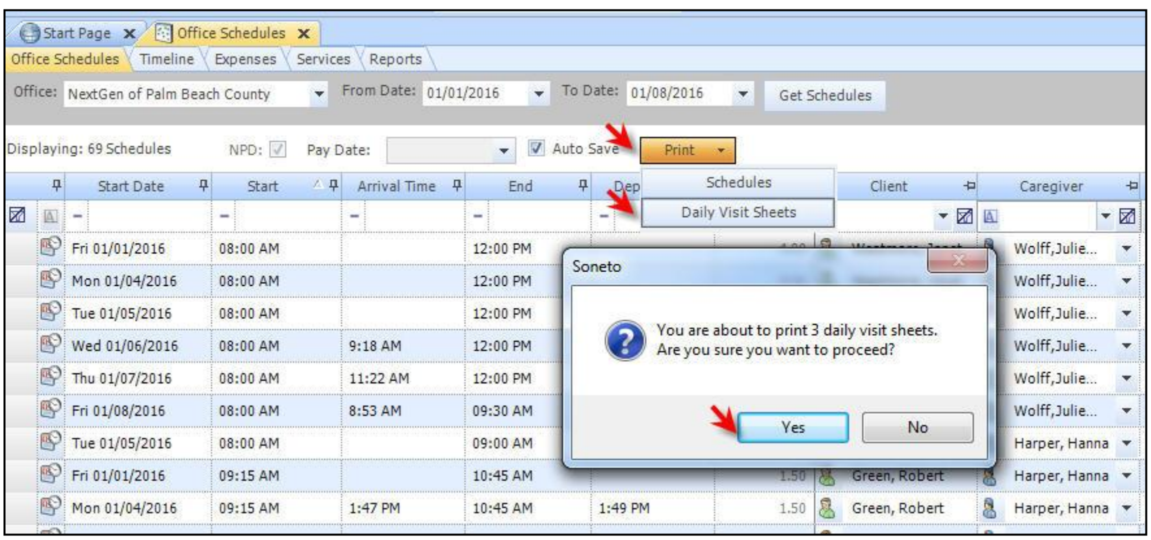


3. Click **Show History** and click the row for the older report.

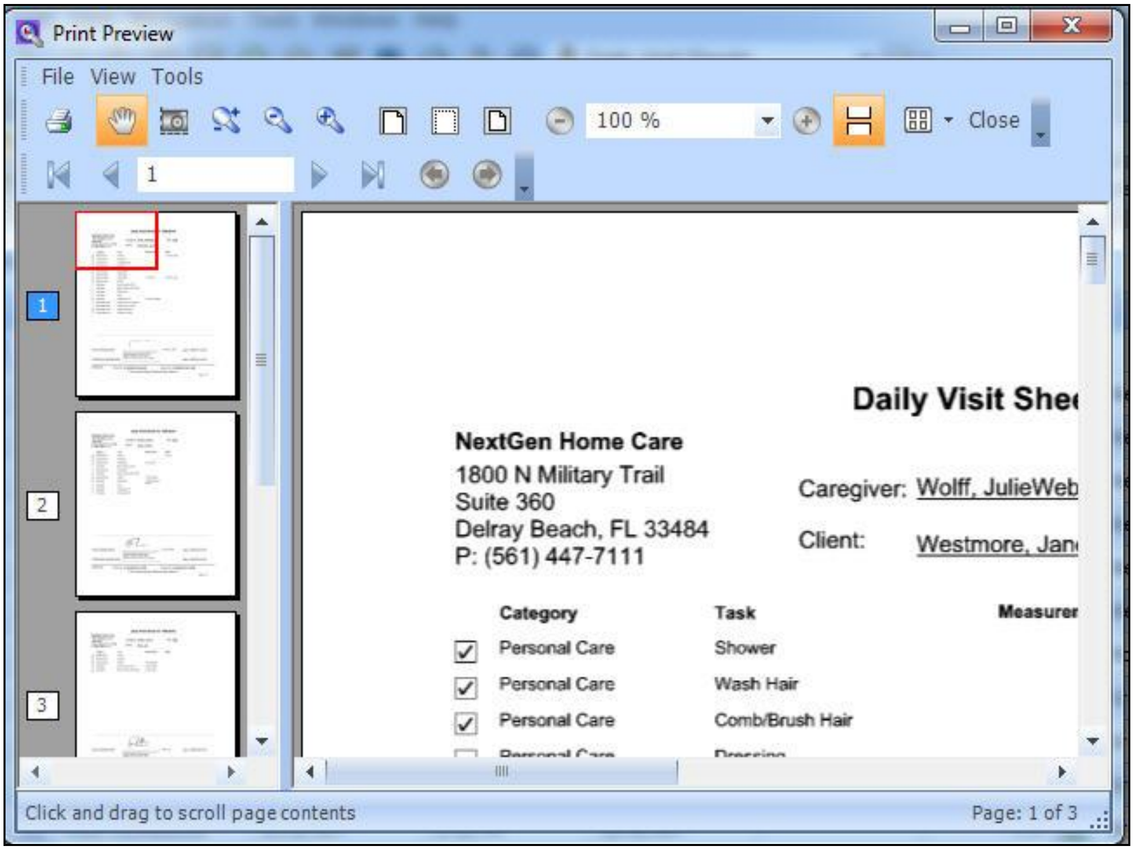


Office Schedules - View/Print reports for all schedules

The Daily Visit Sheet reports for the schedule list can also be batch printed, by selecting **Daily Visit Sheets** option just underneath the **Print** button. The pop-up will tell you how many reports you have. Click **Yes** to bring up the report viewer.

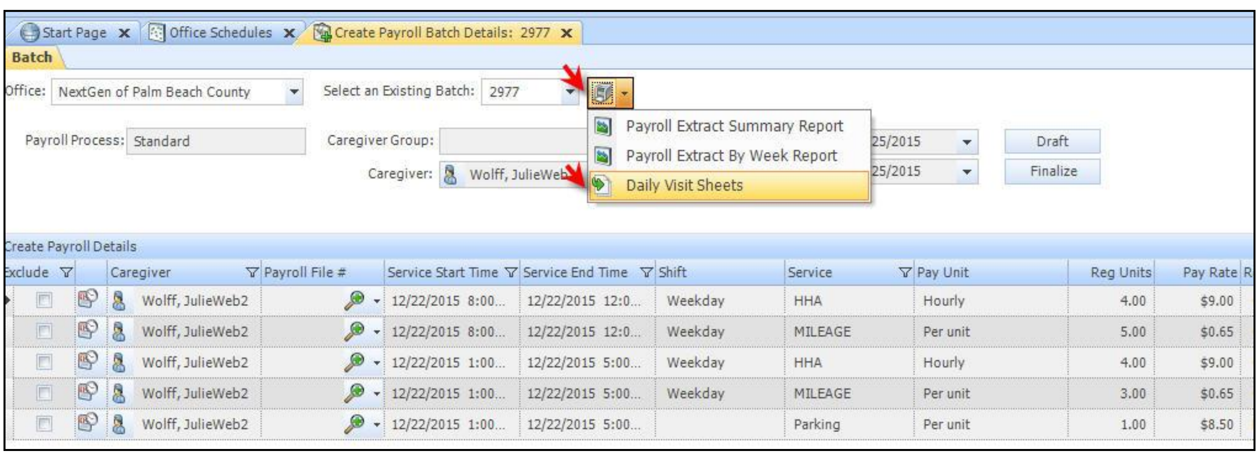


The report viewer opens in a modal that you can drag around on your screen and also minimize and resize. From here you can review and print your Daily Visit Sheet reports.



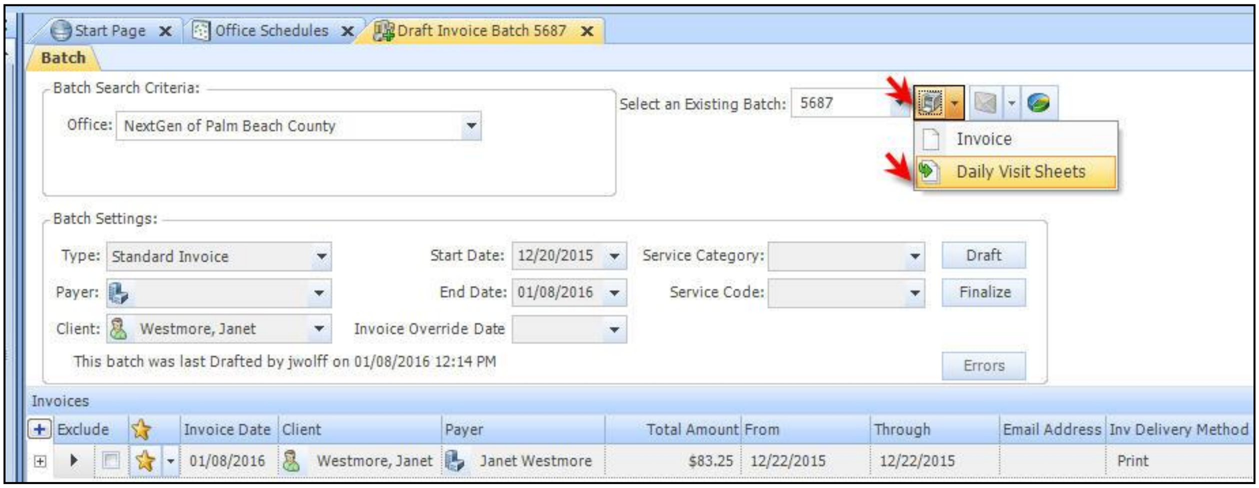
Create/Finalized Payroll - Review/Print Daily Visit Sheet Reports

The Daily Visit Sheet reports can also be run from the payroll batching forms, by selecting **Daily Visit Sheets** option under the Print drop down. When running the report from the payroll batching forms, the most current version of the report is returned.



Create/Finalized Invoices - Review/Print Daily Visit Sheet Reports

The Daily Visit Sheet reports can also be run from the invoice batching forms. When running the report from the invoice batching forms, the most current version of the report is returned.

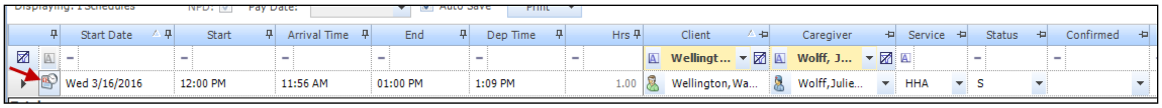


A warning message may appear if there are pending schedule changes. This provides you the opportunity to save changes before creating a report.

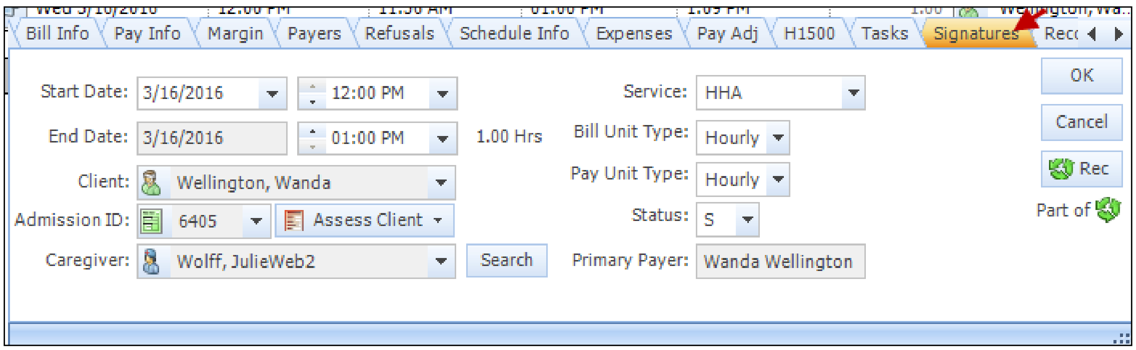
Schedule Signatures Tab Permissions

Daily Visit Sheet(s) can also be viewed and printed from the Signatures Tab on an individual schedule. You will need the *rptDailyVisitSheet* permission, and Read access to the *Schedule.Signatures* permission to view and print existing Daily Visit Sheets for the schedule.

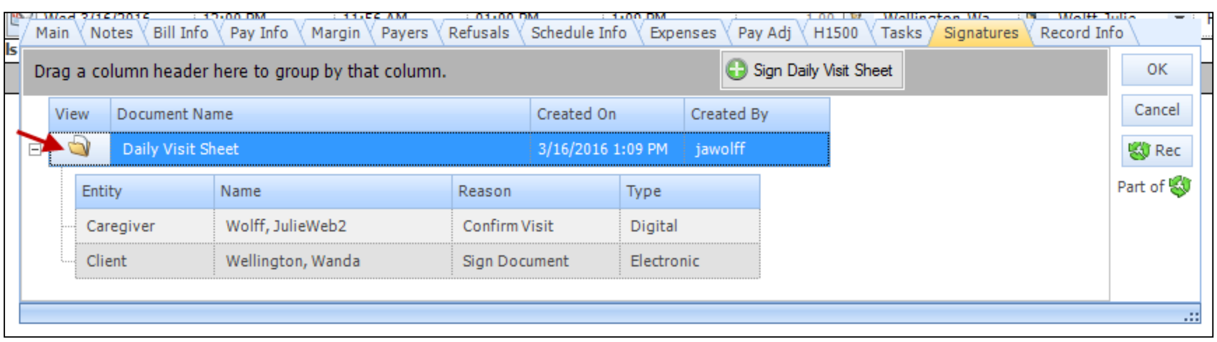
1. Click the Report button on the schedule row to open the Schedule Details for the schedule.



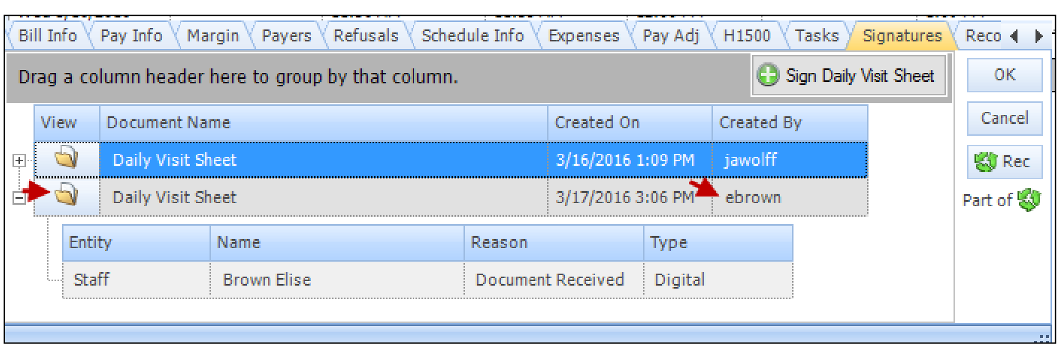
2. Open the schedule and click the **Signatures** Tab.



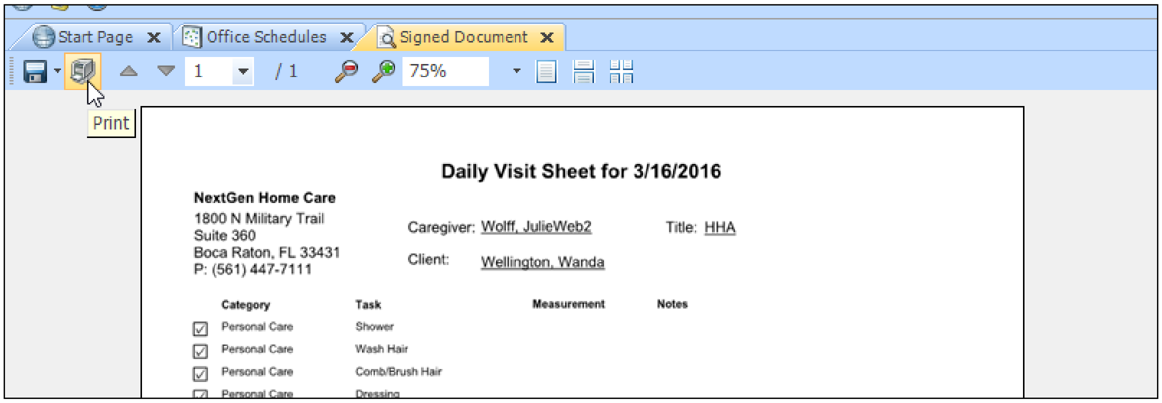
3. The existing Daily Visit Sheet Report record displays. The report can be run by clicking the **View folder** button.



If the schedule has more than one Daily Visit Sheet, click the View folder button for the report you want.



4. The report viewer will open. You can view the report from here. Click **Print** to print the Daily Visit Sheet report.



Daily Visit Sheet created by a Back Office User

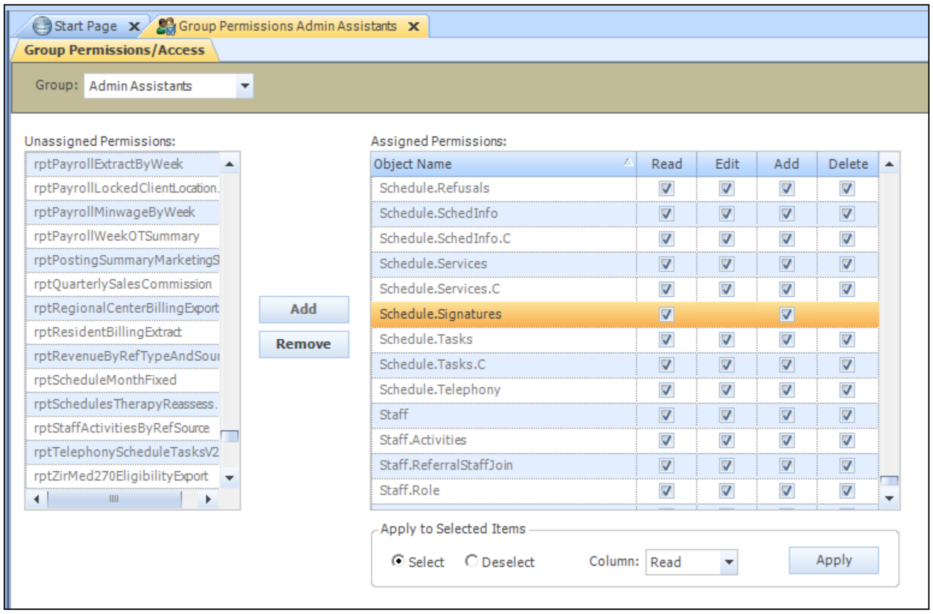
Back office users with the appropriate permissions can create, and be the signer of, a Daily Visit Sheet for the Home Health Aide. The back office user cannot create a Daily Visit Sheet for the skilled user. If the non-skilled user has checked in but did not finish completing the Daily Visit Sheet, the back office user with the appropriate permissions can complete it for them. You can do this when you need to make changes after the caregiver has performed a visit and they cannot go back to the client and get a new signature.

For example, the caregiver provided three personal care tasks but checked off just two of them. In talking with the caregiver and the client, you confirm that all three tasks were performed. You have an agreement with the client that an authorized representative of the agency can sign for the changes.

Permissions

You will need Read and Add to the *Schedule.Signatures* permission. Read gives you access to the “Signatures” tab on the schedule details window. Add allows you to create Daily Visit Sheets from this tab on the schedule.

Note: You should also have the rptDailyVisitSheet report permission.

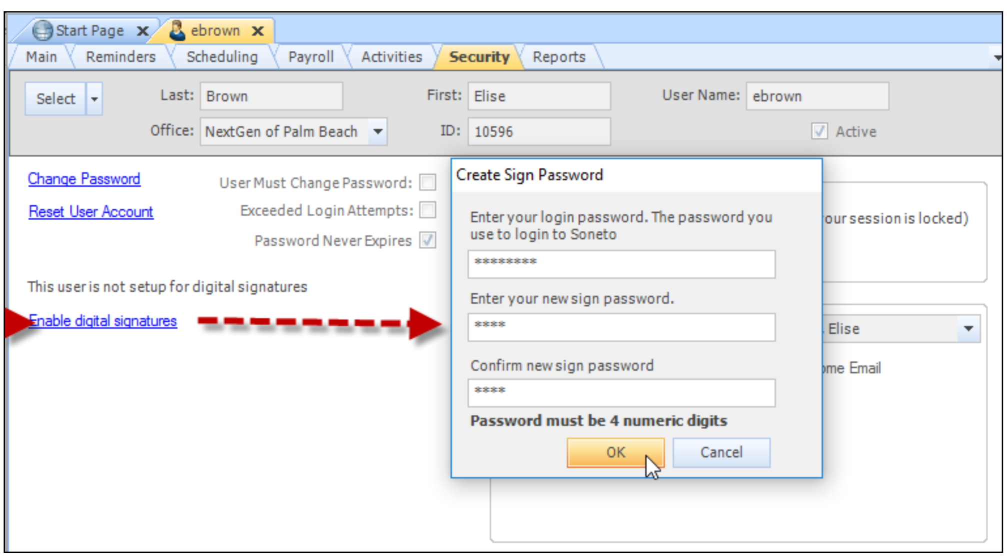


User Record

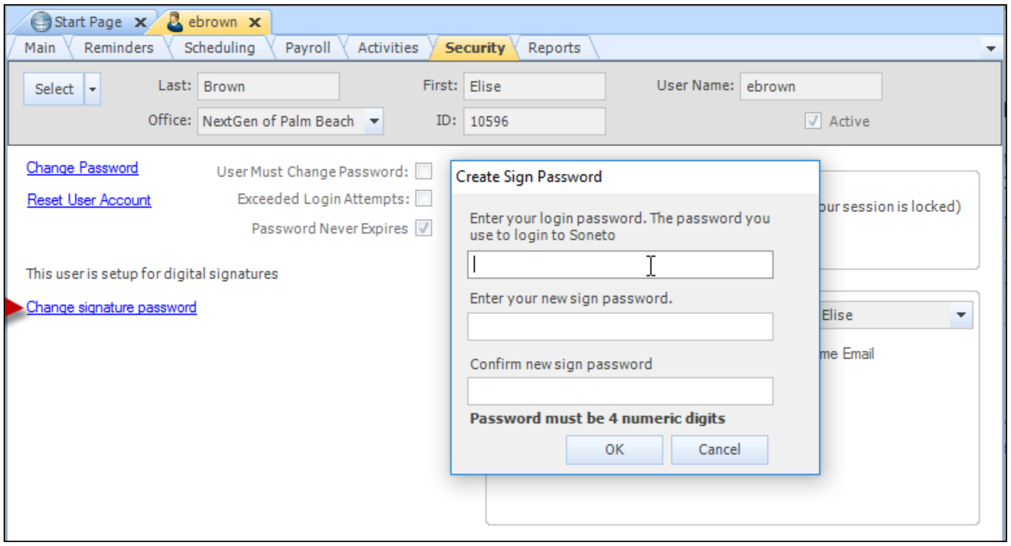
Digital Signature

You will need to have a digital signature. Open your user record, and click the **Enable digital signatures** link. The Create Sign Password box will appear. Enter your current password and your new 4-digit PIN.

Confirm your 4-digit PIN. Click **OK**.

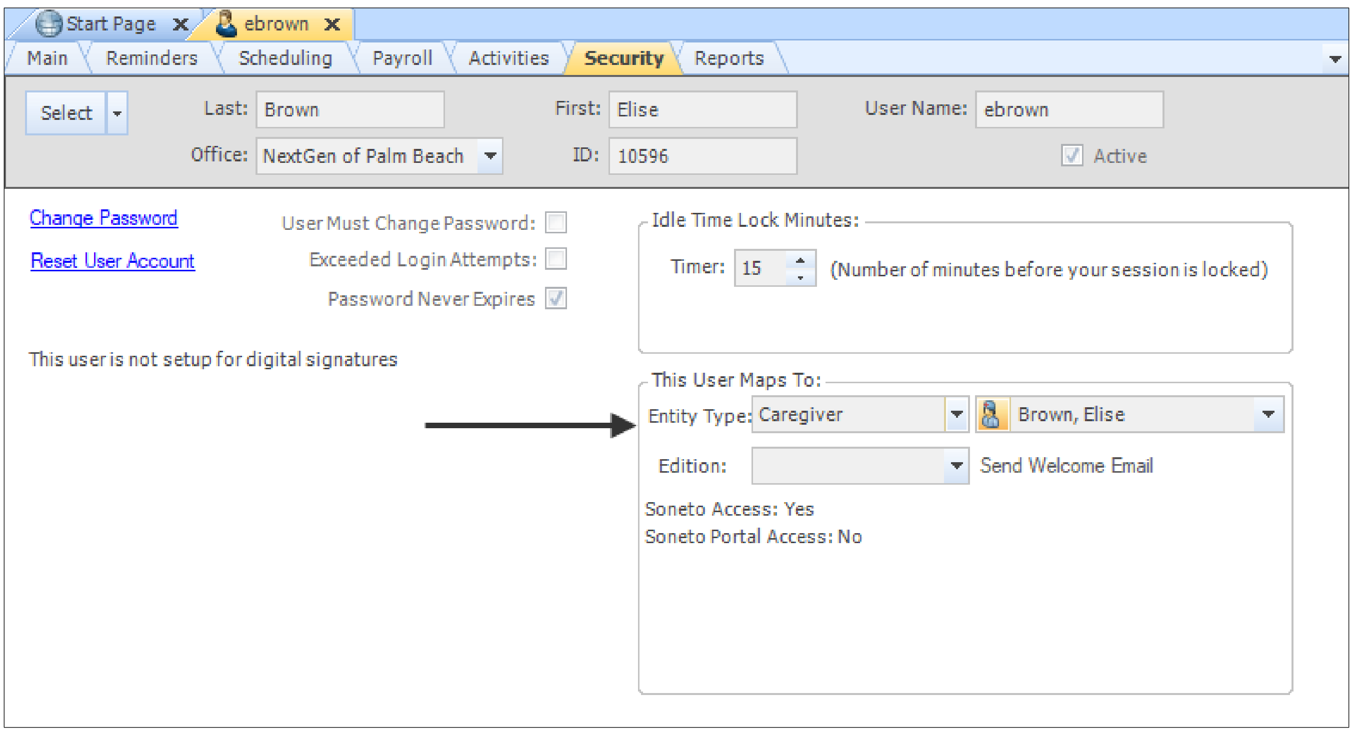


If you need to change your PIN, go to the **Security** tab on your user record and click the **Change signature password** link.



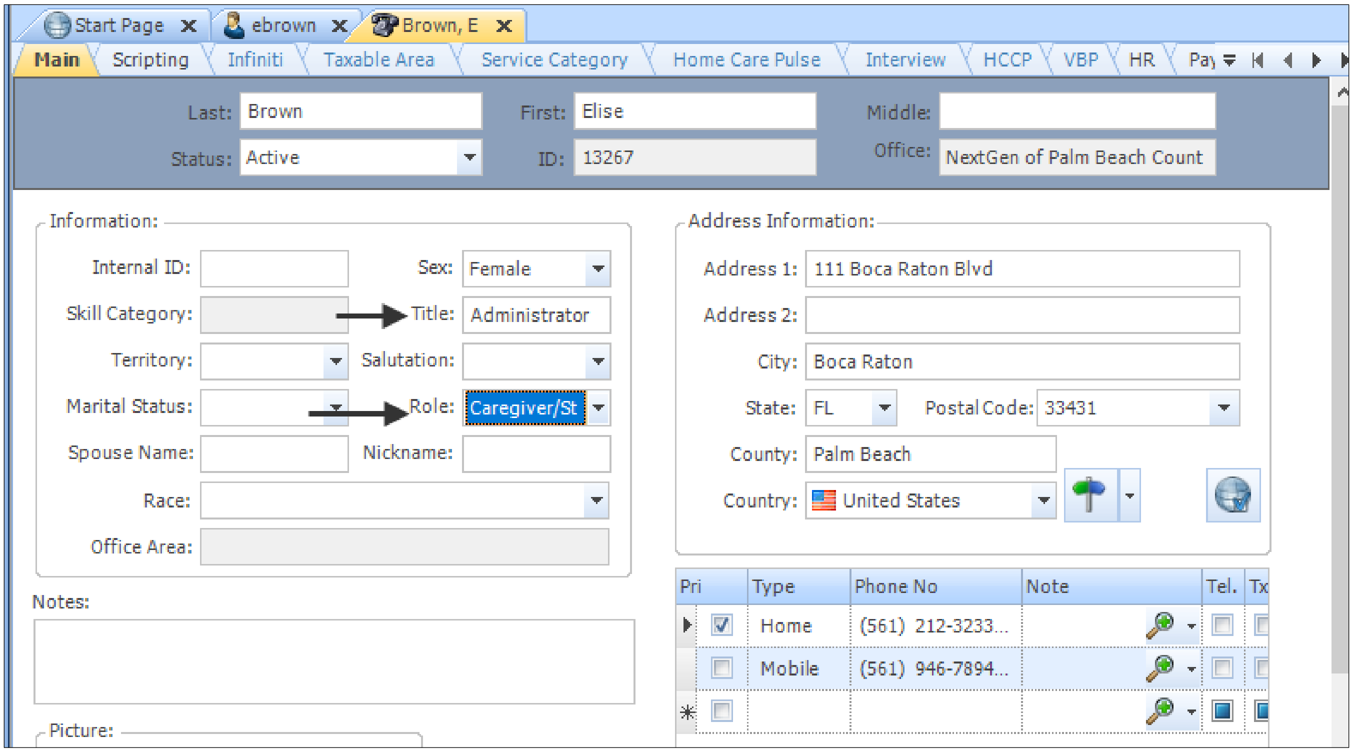
Mapped Entity

You will need a mapped entity on your user record.



Caregiver record with Role must be set to **Caregiver/Staff**.

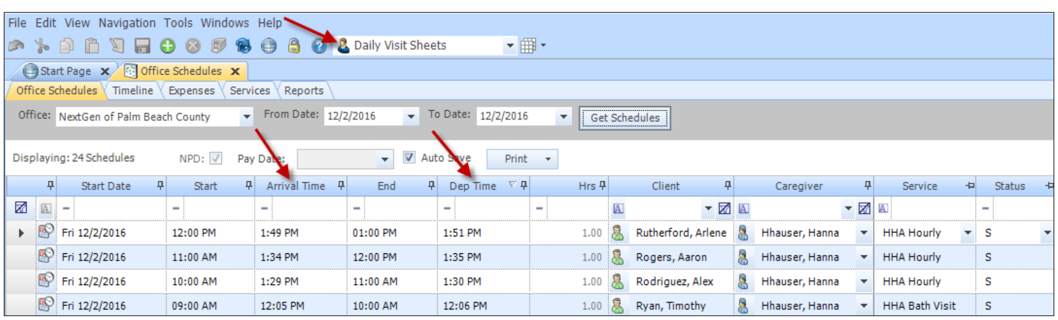
The record should have a Title, as the Title will display on the Daily Visit Sheet.



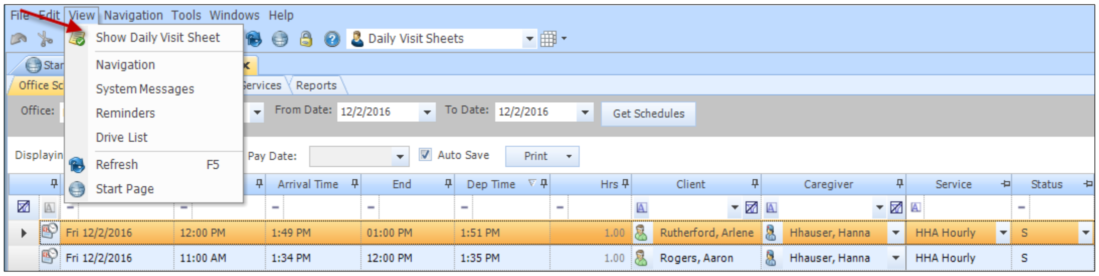
Create a Daily Visit Sheet from a Schedule in the Back Office

Follow the steps below to create a Daily Visit Sheet for Home Health Aides from a schedule.

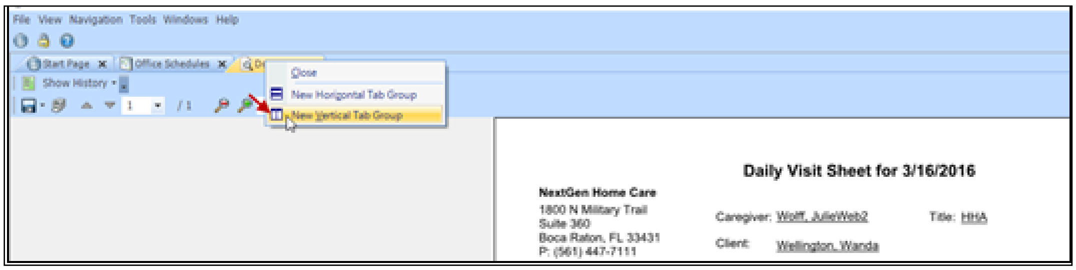
1. Open Office Schedules. In our example, we created a custom Layout that includes the Arrival Time and Dep Time columns. We are using this view because schedules need to have at least a Check In (Arrival Time) before a back office user can create a Daily Visit Sheet for them.



2. Highlight the row of the schedule you want to view in the grid. Click the **Show Daily Visit Sheet** option in the View menu.



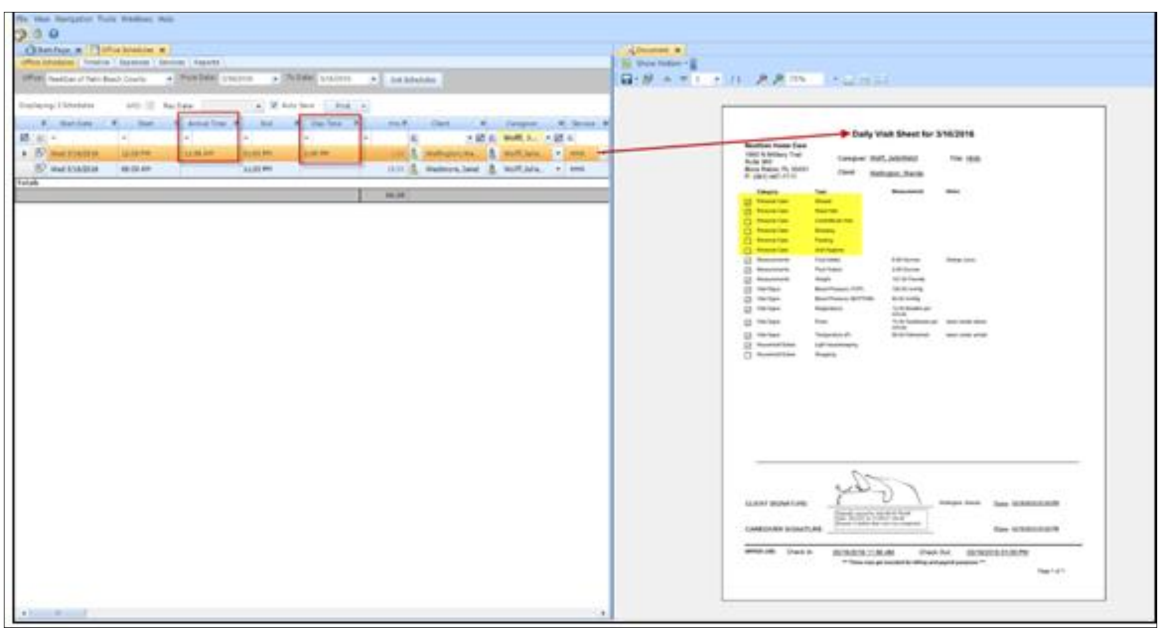
3. Right click on the Document Tab and select the **New Vertical Tab Group** option in the menu.



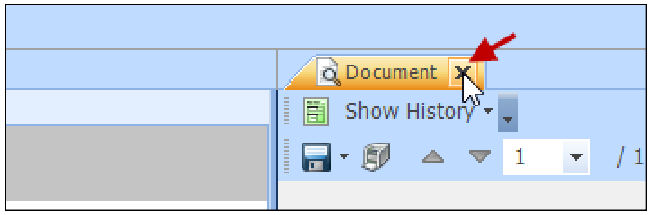
4. The Daily Visit Sheet for the selected schedule row will display. Review the existing report for the schedule and determine if it any changes to the visit are needed.

In our example, we have a Check In and a Check Out with signatures. The client's Service Plan had five Personal Care tasks assigned, but the caregiver checked off just two as being performed during the visit.

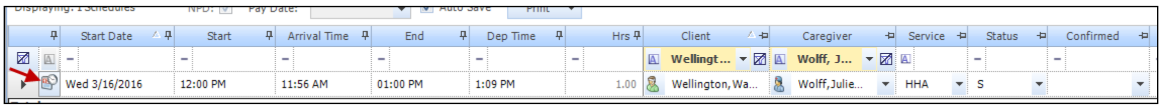
The payer requires at least three Personal Care tasks be provided at each visit. We contact the caregiver, and they confirm that they performed all five Personal Care tasks during the visit but forgot to check them all off. We contact the client and they confirm they did receive the services. We need to make changes to the Schedule Tasks, to show the other three Personal Care Tasks were also completed.



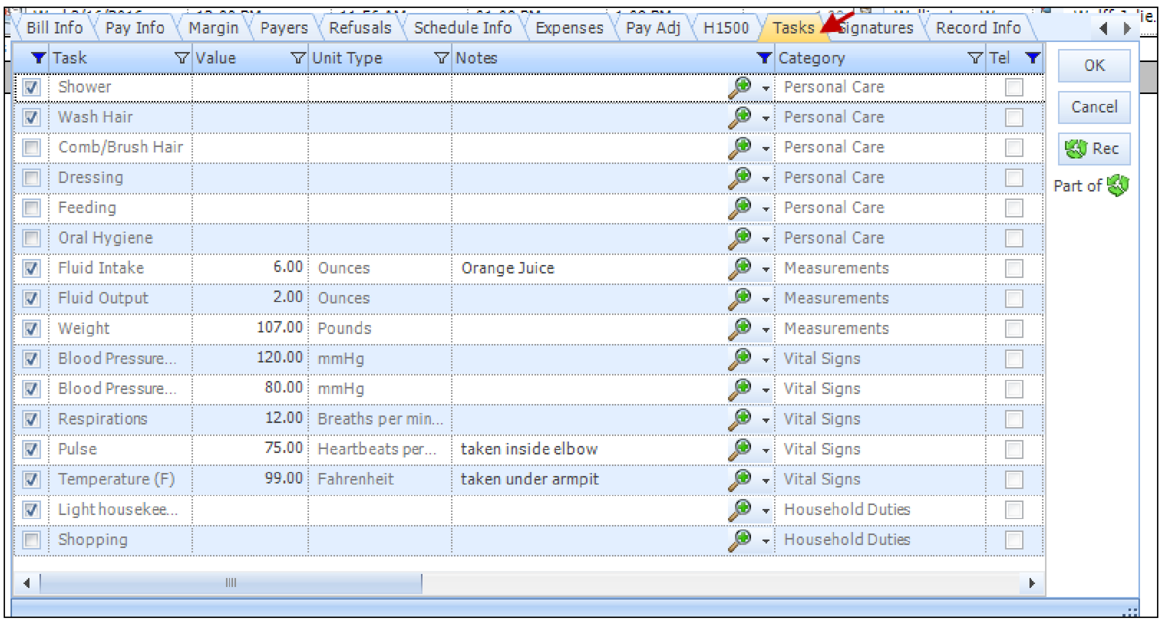
5. Click the **X** on the Document Tab to close the report.



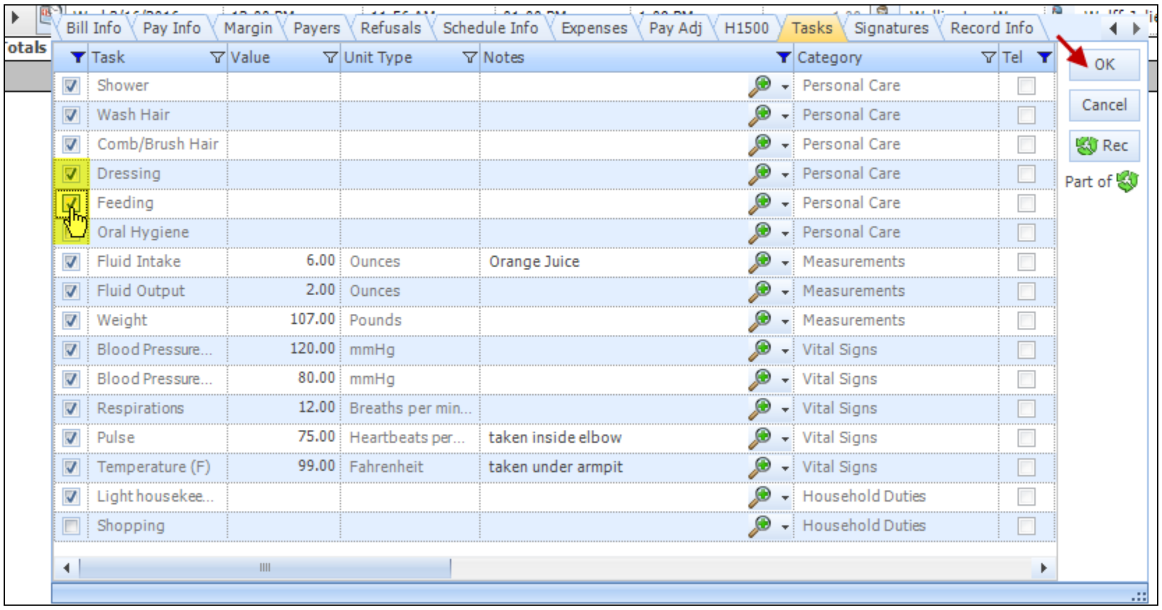
6. Click **Schedule Details** on the schedule row to open the Schedule Details for the schedule.



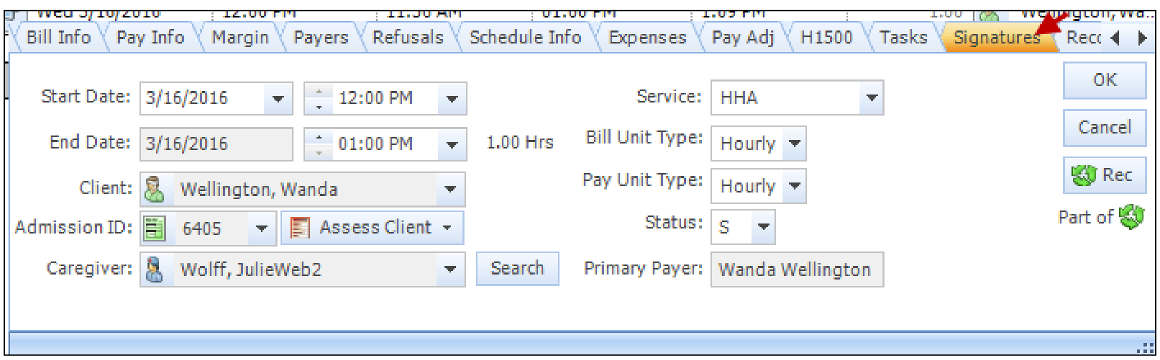
7. Click the **Schedule Details Tasks** Tab.



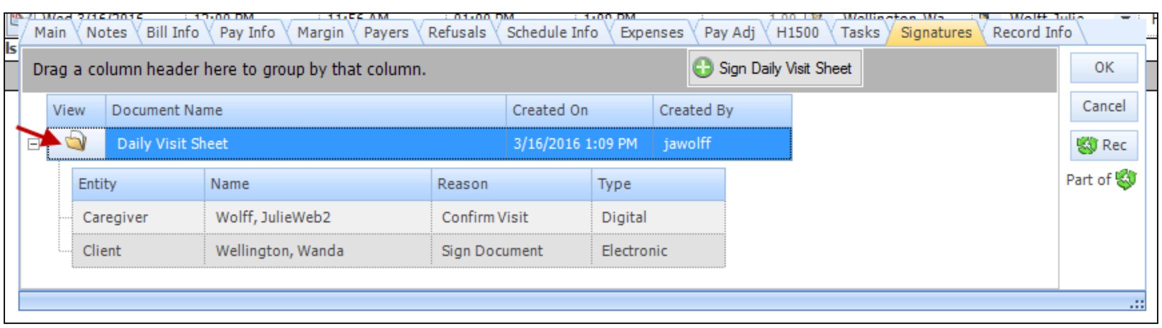
8. Check off the three Personal Care Tasks that were confirmed performed during the visit. Click **OK**.



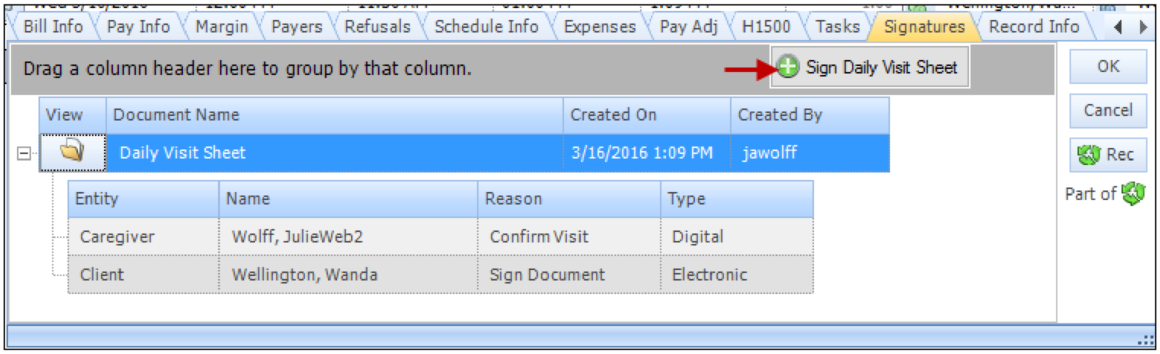
9. Open Schedule Details and click **Signatures** Tab.



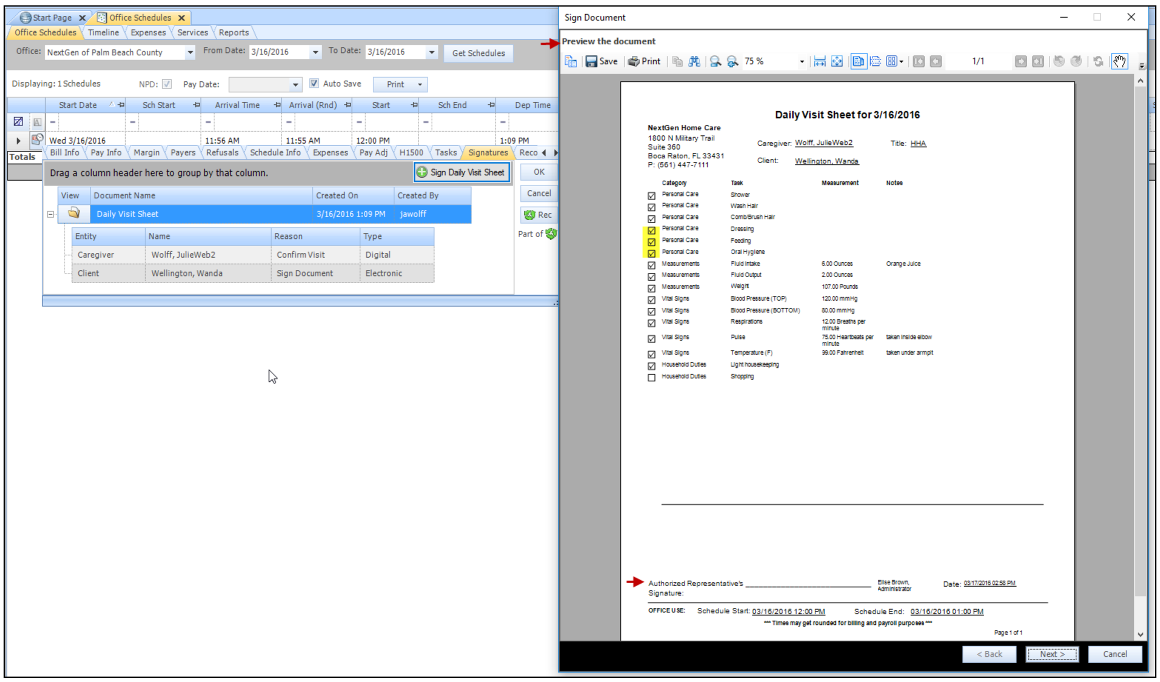
10. The existing Daily Visit Sheet Report record will display. The report can be run by clicking the View folder button.



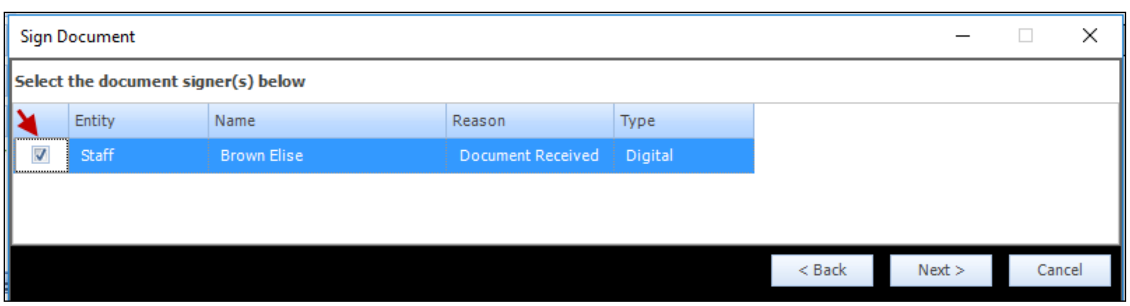
11. Click **Sign Daily Visit Sheet** to create a new version of the Daily Visit Sheet.



12. The Sign Document modal opens. Review the report for changes made to the schedule. Click **Cancel** if more changes to the schedule are needed. Click **Next** to continue.

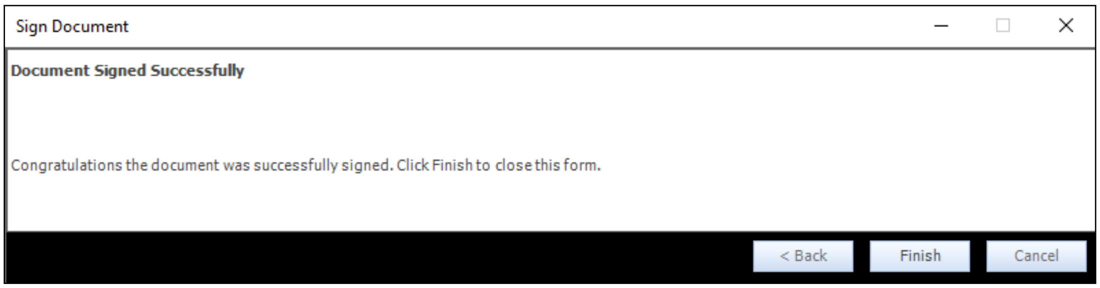


13. The Select Document Signer frame displays. Check the **Select** box for the signer. The signer should be the mapped entity of the user logged into the system. Click **Next**.

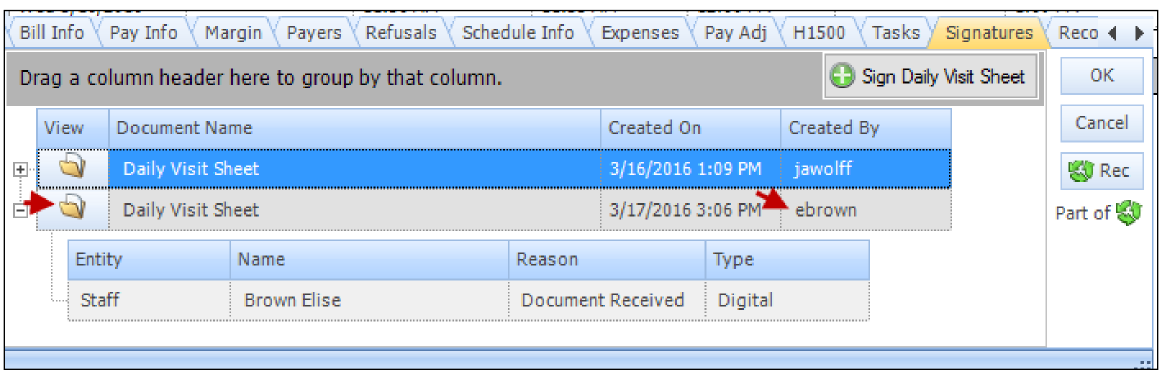


14. The Confirm Document Signature frame displays. Enter your 4-digit PIN. Click **Next**.

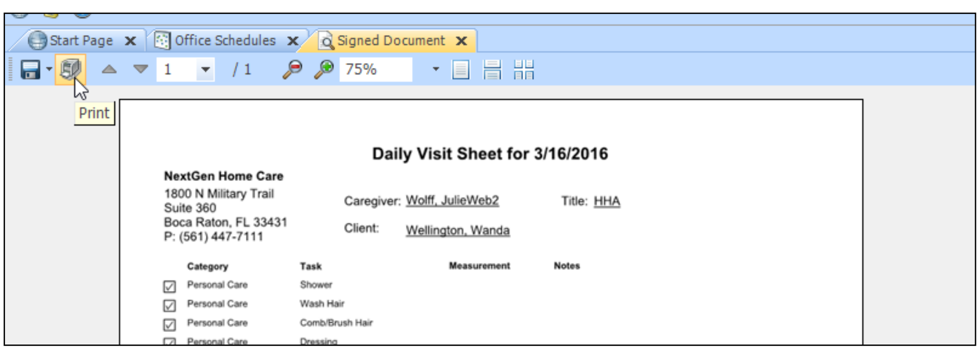
15. The Successful frame displays. Click **Finish**.



16. The Signatures Tab has the new Daily Visit Sheet record. Click the **View folder** button to open the signed document.



17. Click the **Print** button to print the Daily Visit Sheet.



Lengthy names and addresses in the Daily Visit Sheet report will wrap so all information can be viewed and printed.

Signed Daily Visit Sheet

The Daily Visit Sheet's signature line is labelled "Authorized Representative's Signature". The digital signature is that of the user logged into MatrixCare Home Care. The sign reason is "Confirm Receipt of this document". The sign name is the name and title come from the user's mapped entity record. The Date is the date the report was created. The "Office Use" section displays the Schedule Start time and the Schedule End time but not the caregivers Check In or Check Out times. When a Home Health Aide, enters their PIN, the signature statement "Signature(s) confirm the checked daily tasks are completed" will display in the Daily Visit Sheet report. The signature reason meets the requirements to confirm the daily tasks for the visit are complete.

CLIENT SIGNATURE: Wellington, Wanda Date: 03/28/2017 01:35 PM

CAREGIVER SIGNATURE: Digitally signed by JulieWeb2 Wolff
Date: 2017.03.28 13:35:29 -04:00
Reason: Confirm that visit was completed
Date: 03/28/2017 01:35 PM

Signature(s) confirm the checked daily tasks are completed

OFFICE USE: Check In: 03/28/2017 01:00 PM Check Out: 03/28/2017 01:35 PM

***** Times may get rounded for billing and payroll purposes *****

Page 1 of 1

Daily Visit Sheet for 3/28/2017

NextGen Very Excellent Home Care Services, Inc

1800 Northernmost Military
Tribune Trail
Suite 360
NorthWest Delray-Jensen
Beach, FL 33484-1234
P: (561) 447-7111

Caregiver: Wolff, JulieHHA   Title: HHA

Client: Wellington, Wanda

	Category	Task	Measurement	Notes
☑	Personal Care	Bathing - Tub/Shower		
☑	Personal Care	Wash Hair		
	Plan Notes: use no tear shampoo because Mrs. Wellington has sensitive eyes and dry eye syndrome and regular shampoo irritates her eyes and makes her cry.			
☑	Personal Care	Comb/Brush Hair		
☑	Personal Care	Assist with Dressing		
☑	Personal Care	Assist with Feeding		
	Plan Notes: snack for later			
☐	Personal Care	Oral Hygiene		
☐	Personal Care	Shower		
☐	Nutritional Services	Prepare/Serve Dinner		
☑	Household Duties	Straighten Bathroom		
☑	Household Duties	Take Out Trash		
☐	Measurements	Fluid Intake		
☐	Measurements	Fluid Output		
☑	Measurements	Weight	106.00 Pounds	
☐	Vital Signs	Blood Pressure (TOP)		
☐	Vital Signs	Blood Pressure (BOTTOM)		
☐	Vital Signs	Respirations		
☐	Vital Signs	Pulse		
☑	Vital Signs	Temperature (F)	99.00 Fahrenheit	

CLIENT SIGNATURE: ____________ Wellington, Wanda   Date: 03/28/2017 01:35 PM

Digitally signed by JulieWeb2 Wolff
Date: 2017.03.28 13:35:29 -04:00
Reason: Confirm that visit was completed

CAREGIVER SIGNATURE: ____________   Date: 03/28/2017 01:35 PM

Signature(s) confirm the checked daily tasks are completed

OFFICE USE: Check In: 03/28/2017 01:00 PM   Check Out: 03/28/2017 01:35 PM

***** Times may get rounded for billing and payroll purposes *****

Page 1 of 1

Review, Change the Status and Approve Web-enabled Forms in the Back Office

The following web-enabled Forms are currently available:

- Assessment: BRIGGS Form 3569EB - Skilled Nurse Visit Note
- Supplemental: BRIGGS Form 3166EHC - Braden Scale
- Supplemental: BRIGGS Form 3577E - Care Coordination Note
- Supplemental: BRIGGS Form 3911EHC-13 - Fall Risk Assessment MAHC 10
- Supplemental: BRIGGS Form 3542E - Home Environment Safety Evaluation
- Supplemental: MatrixCare Form - Hospital Risk Evaluation Form
- Supplemental: BRIGGS Form 3191E - Medical History/Physical/Functional Assessment
- Supplemental: MatrixCare Form - Pain Location Assessment
- Supplemental: BRIGGS Form 3583E - Summary (Non-OASIS)
- Supplemental: BRIGGS Form 3553E - Supervisory Visits of Home Health Care Staff
- Supplemental: MatrixCare Form - Wound Location Assessment

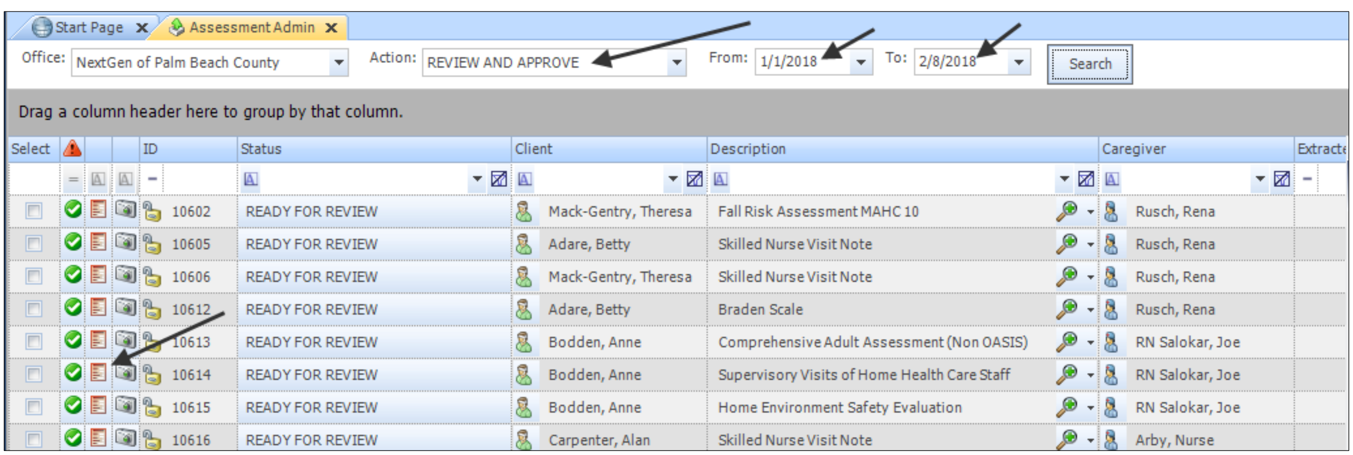
Important! Please note that web-enabled forms cannot be used offline.

For more detail on Forms, refer to the Quick Start Guide for Skilled Mobile Users.

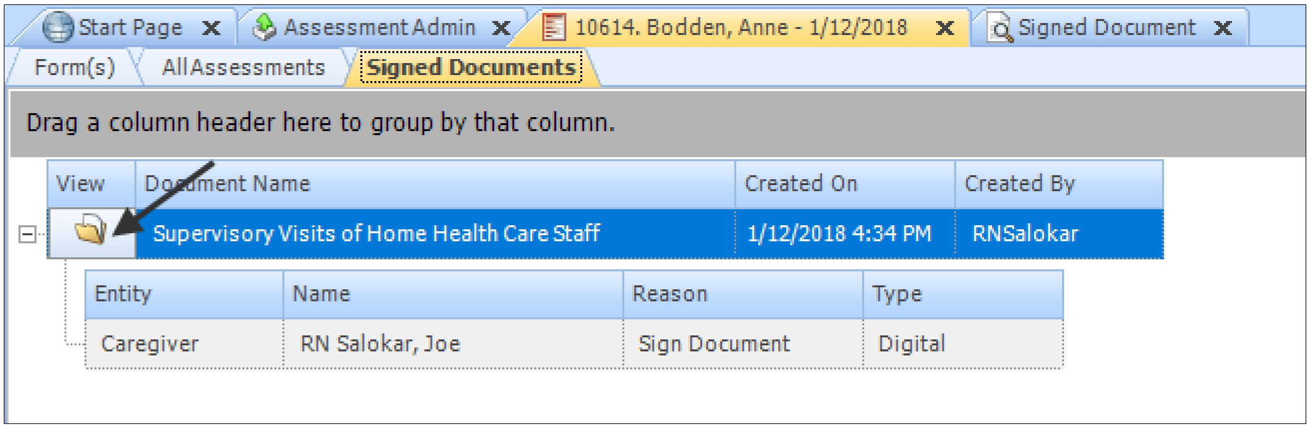
Important! Please note that backoffice users working with web-enabled forms must be assigned the **POC User (Skilled)** permission group, in addition to their other assigned groups.

The back office supervisor can use the assessment process manager on web-enabled form to "Review and Approve" forms or revert them to "In Progress" and add an event note explaining why so that documentation can be completed. You can view a signed web-enabled form in the back office:

1. In the back office application, go to **Assessment Admin**, select the action of **REVIEW AND APPROVE** and enter the dates of the form and click **Search**.



2. Click on the red document form page to open and review the form.
3. To view the signed web-enabled form, click on the **Signed Documents** tab.
4. Click the folder button to the left of the form.



5. A signed document form will appear with the digital signature.

   Note: In a signed document form, the Office information defaults automatically.

NextGen Very Excellent Home Care Services, Inc
1800 Northernmost Military Tribune Trail Hammondville Compound Site, Suite 3I
NorthWest Delray-Jensen Beach, FL 33484-1234
(561) 447-7111 (P) (954) 827-0558 (F)

SUPERVISORY VISITS OF HOME HEALTH CARE STAFF

I. CLIENT INFORMATION

Client Name (Last, First, Middle)			Medical Record No.
Bodden	Anne	M	BA-302-495
Name of Staff Member Being Supervised (Last, First, Middle)			Date of Supervisory Visit 3/22/2017

Staff Person In Home During Supervisory Visit?
☐ Yes ☐ No

II. STAFF INFORMATION

ITEM	STAFF MEMBER EXCEEDS REQUIREMENTS	MEETS REQUIREMENTS	DOES NOT MEET REQUIREMENTS	NOT OBSERVED	COMMENTS
1. Reports for work assignments as scheduled.	■	☐	☐	☐	Always early
2. Identifies self by name and title to the client.	■	☐	☐	☐	Polite
3. Demonstrates courteous behavior toward the client and others.	■	☐	☐	☐	Very courteous
4. Demonstrates cooperative behavior with the client and others.	■	☐	☐	☐	Good behavior
5. Demonstrates positive and helpful attitude toward the client and others.	■	☐	☐	☐	
6. Demonstrates competent skills and expertise.	■	☐	☐	☐	
7. Demonstrates adequate communication skills.	■	☐	☐	☐	
8. Follows client care plan.	■	☐	☐	☐	
9. Documents provided home health care services in an appropriate manner.	■	☐	☐	☐	
10. Informs nurse supervisor of client needs and condition as appropriate, in a timely manner.	■	☐	☐	☐	
11. Adheres to home health care agency policies and procedures.	■	☐	☐	☐	
12. Utilizes proper body mechanics.	■	☐	☐	☐	
13. Utilizes good grooming habits.	■	☐	☐	☐	
14. Complies with home health care agency dress code.	■	☐	☐	☐	
15. Other.	■	☐	☐	☐	
16. Other.	■	☐	☐	☐	

Person Completing This Form	Signature
RN Salokar, Joe RN	Digitally signed by Joe RN Smith Date: 2017.03.22 14:51:04 -04:00 Reason: Approve Document

Form 3553E Rev. 5/08 © BRIGGS, Des Moines, IA (800) 247-2343
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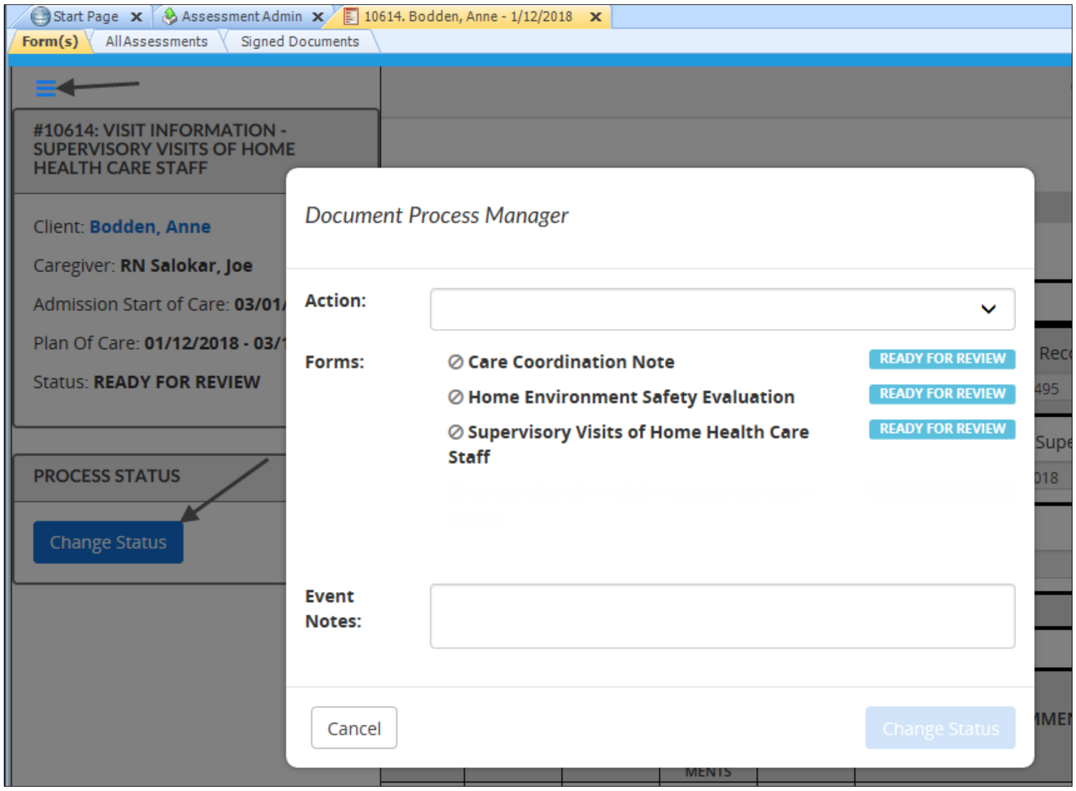
BRIGGS Healthcare

6. The back office user can review the signed document and change the process status either on the form or in Assessment Admin.
7. To change the status directly on the form, click the hamburger button on the top left of the page.
8. Click **Change Status** button and the Process Manager pop up appears.



9. Select your action and enter an optional Event Note if needed.
10. Press **Change Status**. The status of the form is changed.

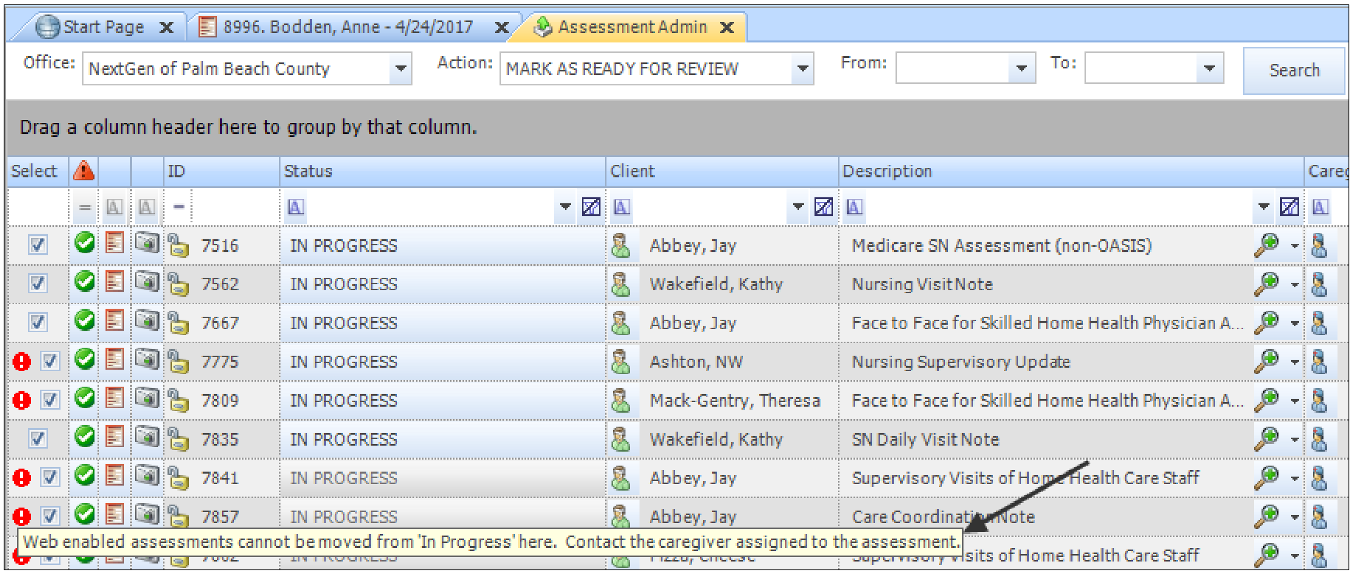
Web-enabled forms will have signed PDFs and will not have the Assessment Report for printing. The signed PDF is used for printing.

Important! When viewing another caregiver form(s), the back office user does not have the option to sign it. It can only be signed by the caregiver on the form when setting it to "Ready for Review" status.

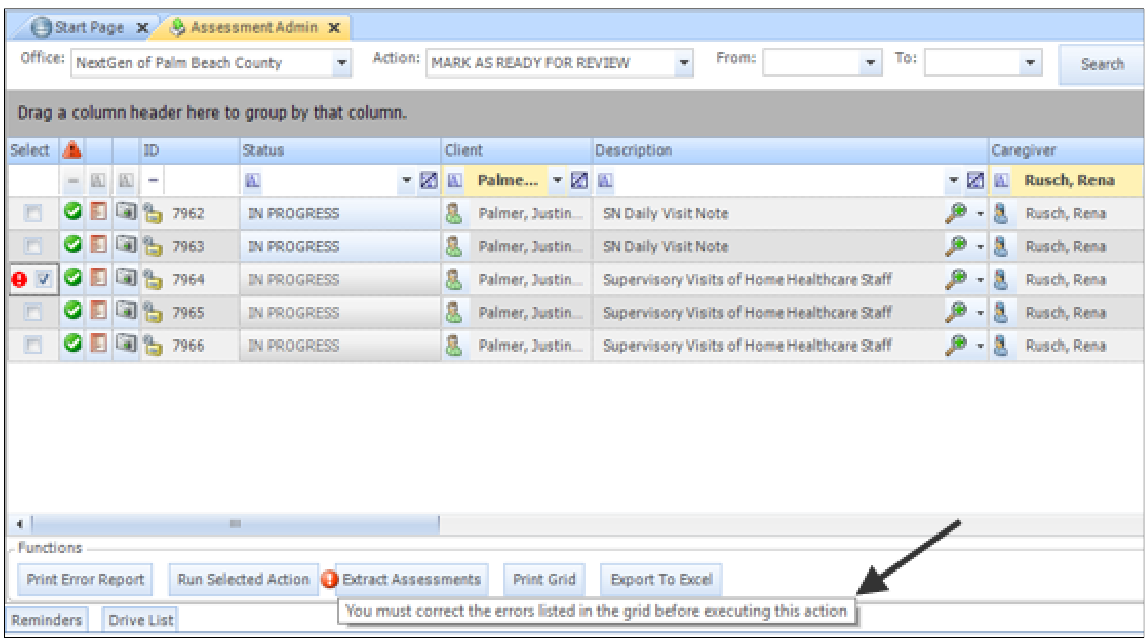
Web-enabled Forms cannot be changed from "In Progress" to "Ready for Review in the Back Office

Web-enabled forms can only be edited by the Caregiver on the form. In Assessment Admin, web-enabled forms cannot be moved from "In Progress" to "Ready for Review". Only the caregiver on the form can change the status to "Ready for Review". The back office user can set the web-enabled form to other process statuses. This will help alleviate having forms reviewed that skilled users are still working on.

- When attempting to select a web-enabled form that is "In Progress" and set it to "Ready for Review status" a new message appears alerting you of the following: "web-enabled assessments cannot be moved from "In Progress" here. Contact the caregiver assigned to the assessment." The Caregiver assigned to the assessment, digitally signs the forms when setting it for review status. On the Document tab, you can right-click and select new option. This option is not available to create a signed document.



- When the Action “Mark as Ready for Review” is selected, and the “**Run Selected Action”** button is clicked, with a web-enabled form selected, you will get the following warning message: “You must correct the errors listed in the grid before executing this action.”

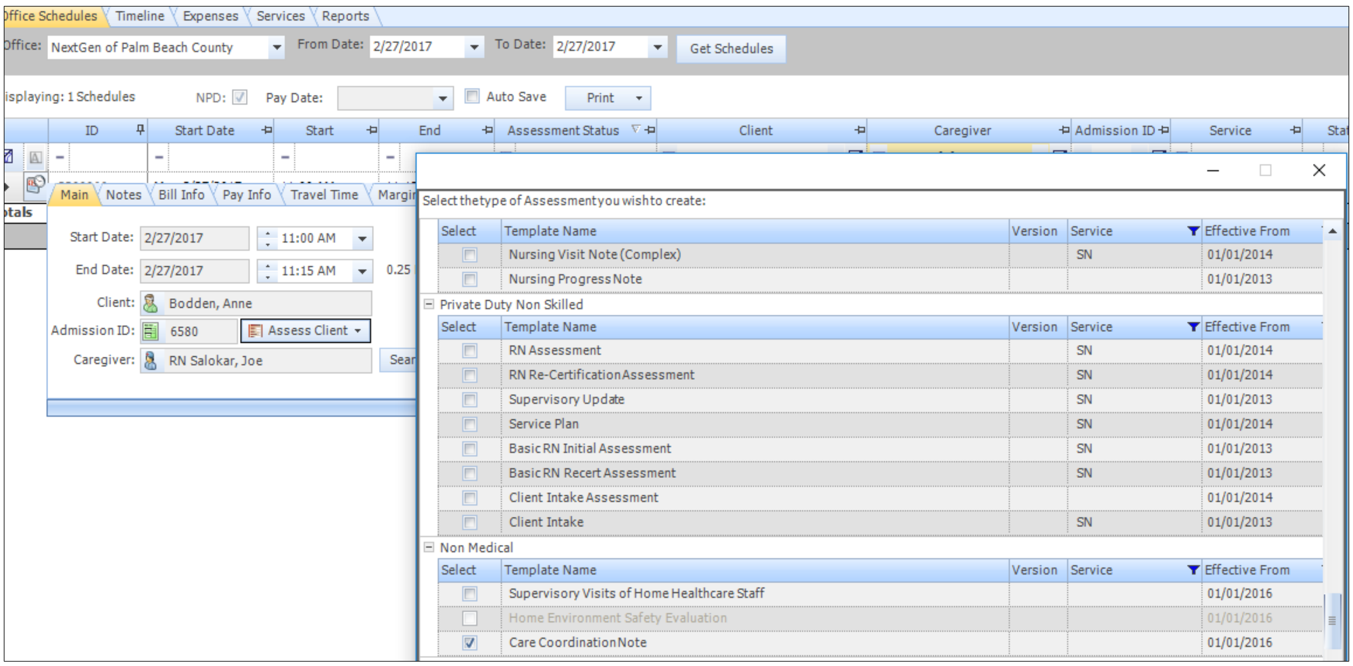


Schedules can have more than one Associated Assessment

The **Assess Client** button functionality allows more than one assessment to be created on a schedule and associated to the schedule. This applies to the “Assess Client” drop down options.

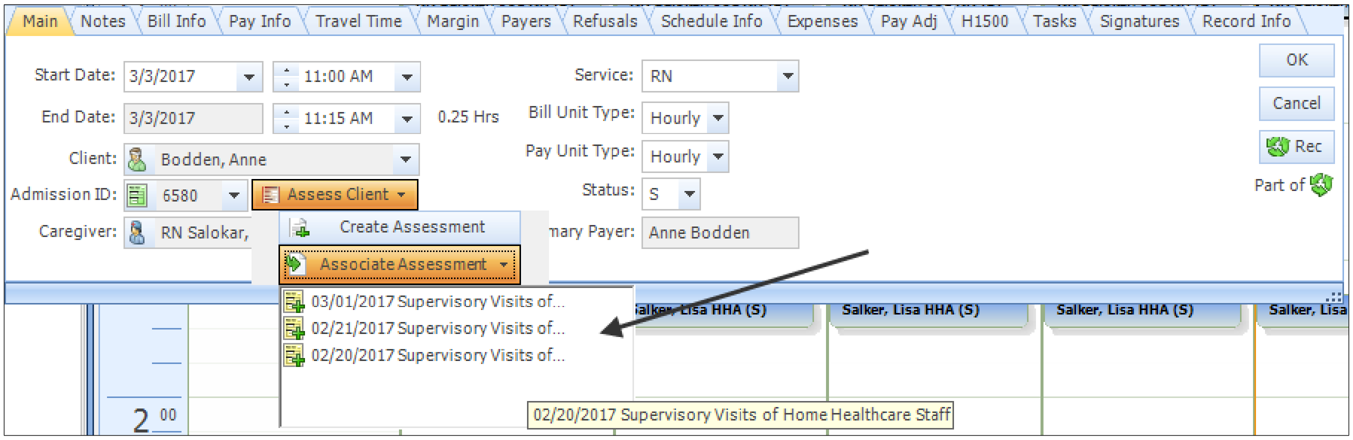
Note: Only one instance of a type of assessment can be associated to a schedule.

The **Create Assessment** button will continue to be active when there is one or more assessments already associated to the schedule. When a type of assessment is already associated to the schedule, that type will not be available to select.

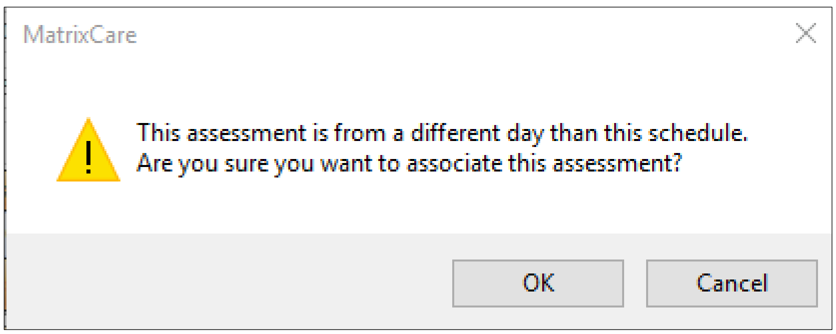


The **Associate Assessment** button displays a list of all existing assessments available to be associated to the schedule. All web-enabled assessments for any date that are not already associated to a schedule will display in the list along with the date of the assessment.

Note: When there are no available assessments, the system displays the message: “No Matching Assessments.”

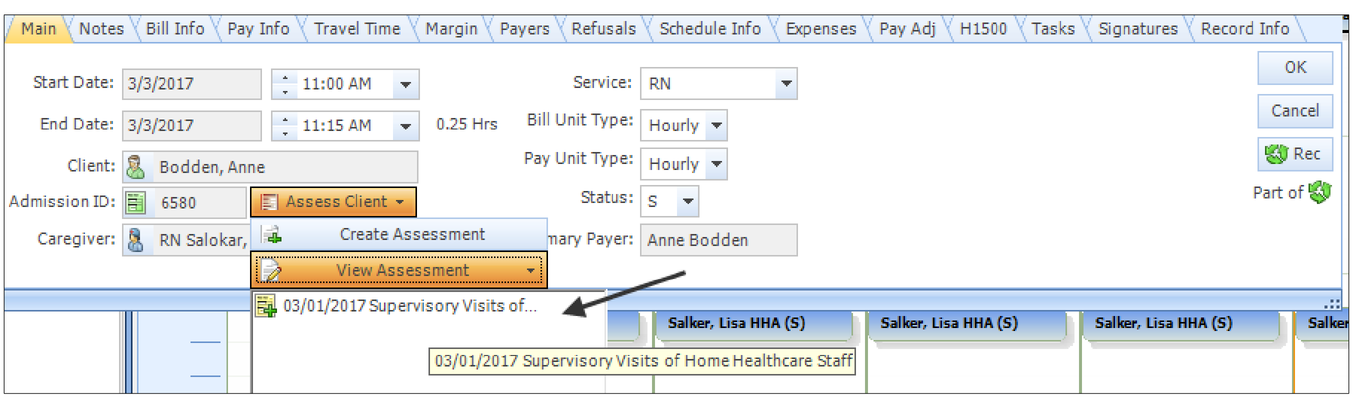


A message will display when an assessment from a different day than the schedule is selected to associate.

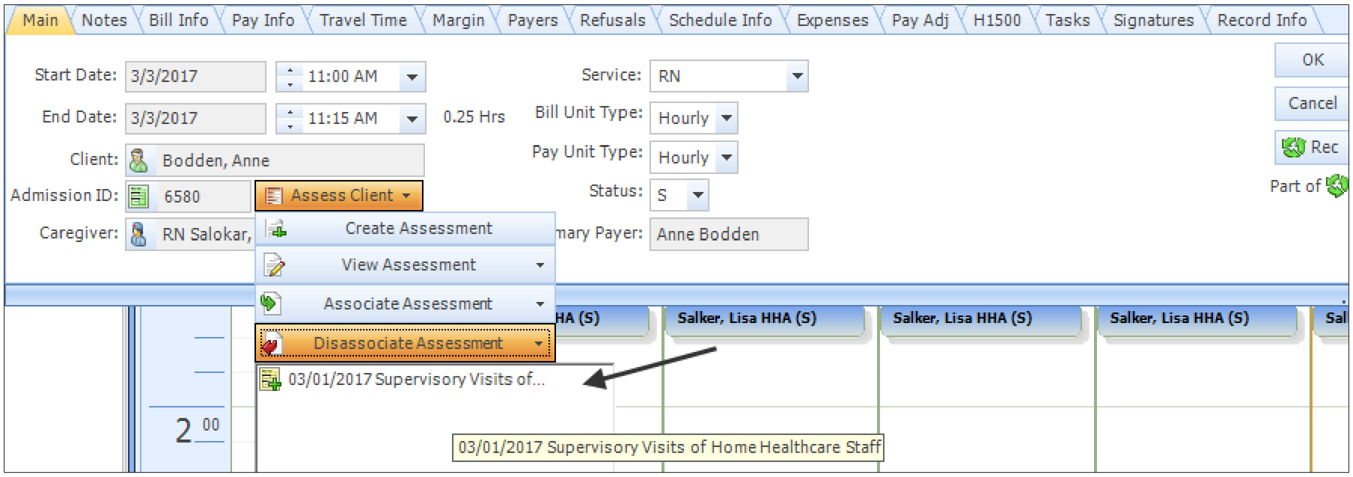


Note: If an assessment is from a different day than the schedule, you are prompted to associate the assessment.

The **View Assessment** button displays a list of all associated assessments with dates.

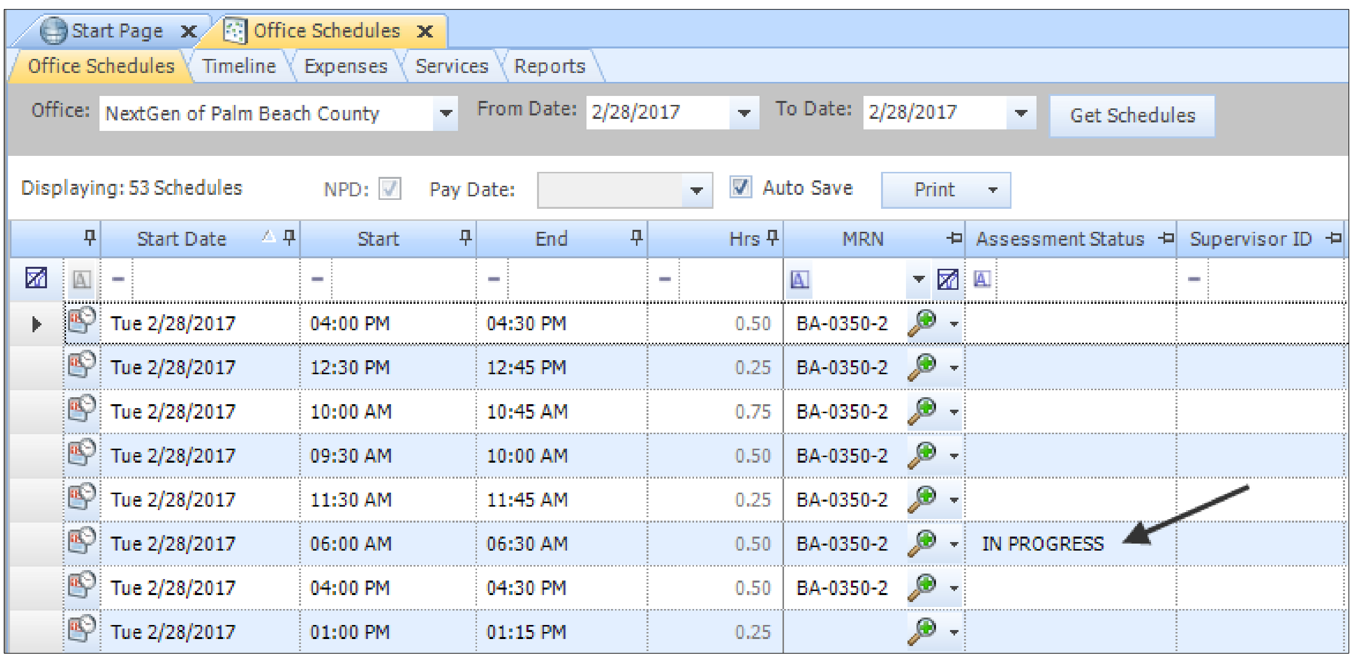


The **Disassociate Assessment** button displays a list of all disassociated assessments with dates.



Office Schedule List View Assessment Status Column

When there is more than one assessment associated to a schedule, the assessment status field will display the status of the assessment that was created first.



Note: This is the assessment with the lowest ID number.

Service Plan Versioning

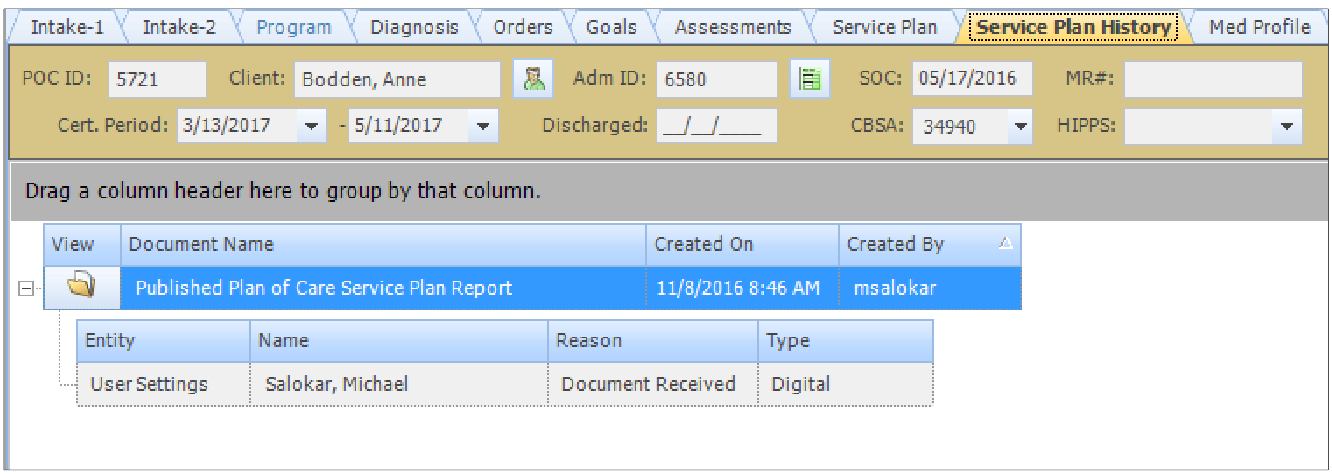
Back Office users working with service plans will need to have the **PlanofCare.ServicePlans.History** permission assigned to them.

- Users with read permission, will see the Service Plan History tab and be able to view and print the published service plan reports.

- Users with read, edit, add permission will also be able to publish service plans. They will see the Publish button on the Service Plan tab when there is a draft service plan.

In order to publish a service plan, you must have the following permissions to the office of the current admission:

- Read Permissions:
  - PlanOfCare.ServicePlans.History
  - Admission
  - Client
  - Caregiver
  - PlanOfCare.ServicePlans
- Add/Edit Permissions:
  - PlanOfCare.ServicePlans.History



Back Office User - Plan of Care Service Plan (Process and Report)

The back office user can create, modify and sign the Plan of Care Service Plans if the office is enabled to use the Draft Plan of Care Service Plan process. A back office user can also retrieve historical, signed Plan of Care Service Plan documents and print them from the new Service Plan History tab. The office must be enabled to use the Draft Plan of Care Service Plan process. The Point of Care Implementation Team will set up this feature.

Note: When service plan versioning is first enabled, existing service plans will be in Published status so they display on schedules. They will also have the capability of being published to create a service plan history report.

The back office user must have the permission called "PlanOfCare.ServicePlans.History" to create, modify, view, print and sign the Plan of Care Service Plans. Read permissions allow you to view reports. Add permissions allow you to view, sign and publish reports.

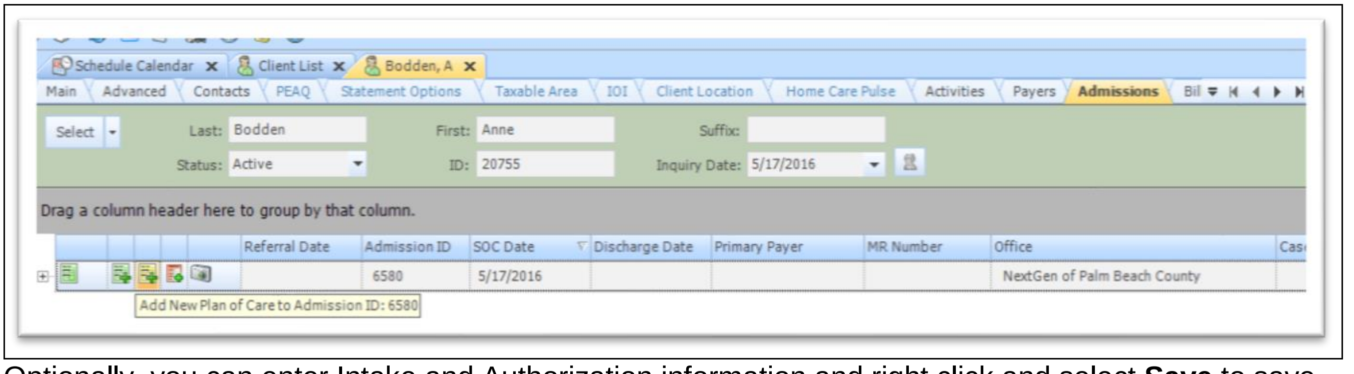
Plan of Care Copied Forward

When using the copy forward feature to create the clients next plan of care, the service plan will be copied as a draft service plan. The draft service plan must be published for the tasks to appear on the Caregiver schedules. When the current Plan of Care has a draft service plan, the draft will be copied forward. When there is no draft the most recent published Service Plan will be copied forward.

Important! The back office user will not be affected by the draft Plan of Care Service Plan process if the office is not using the mobile application.

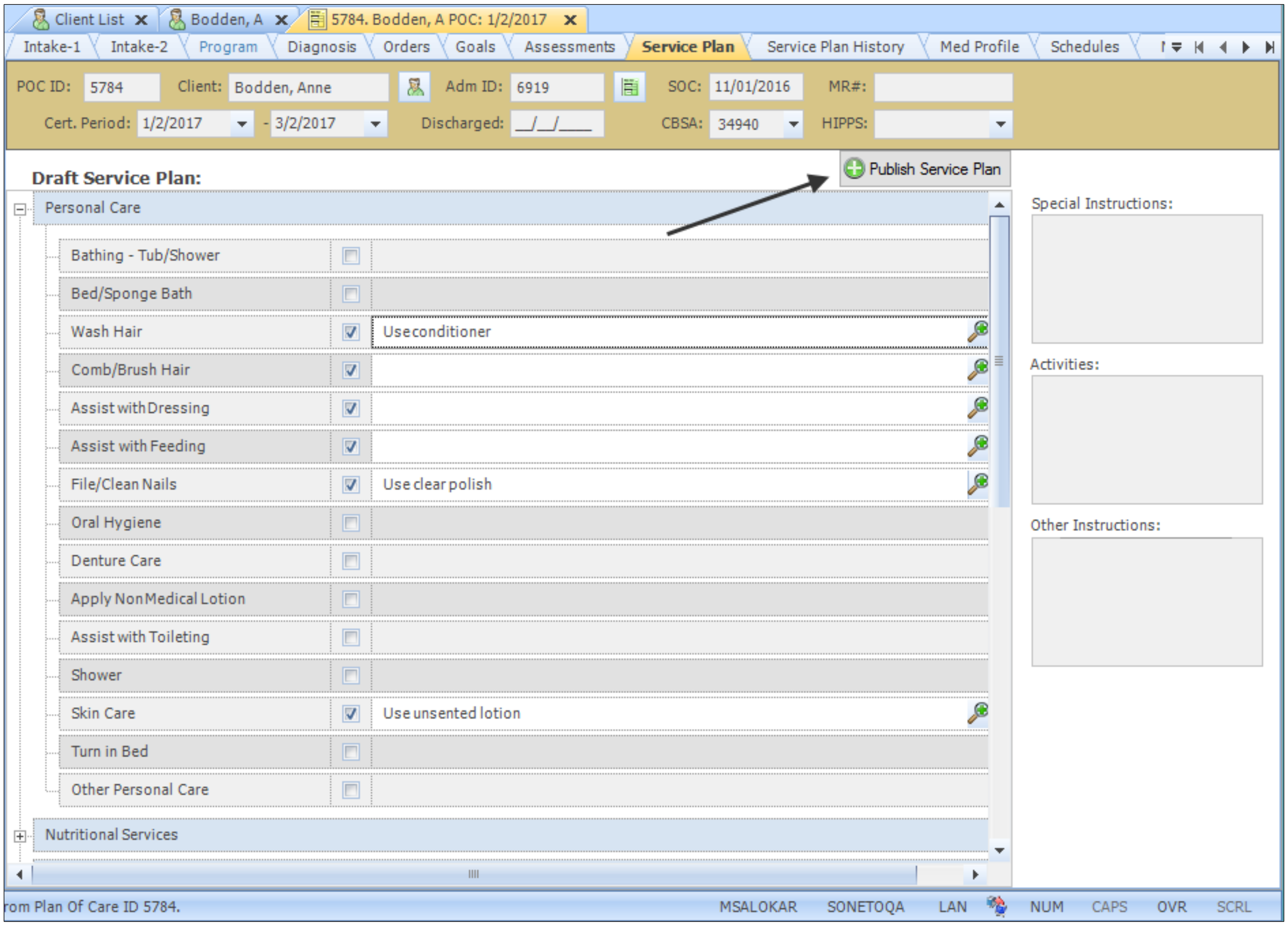
To add or view the clients Plan of Care and Service Plan:

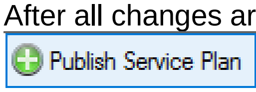
1. From the main menu, click **Navigation**, **Operations** then **Clients**.
2. Double-click on the desired client and click the **Admissions** Tab.
3. Click on the **Add New Plan of Care to Admission ID** button.



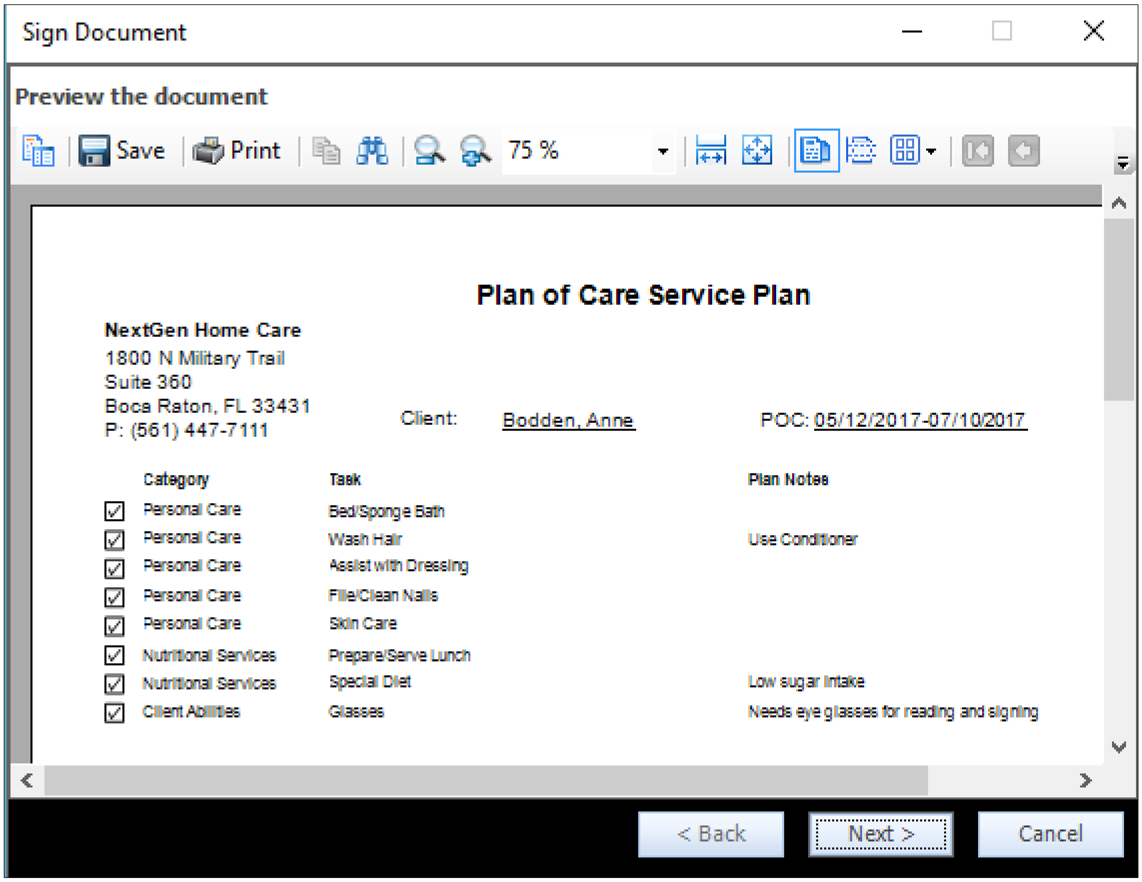
Optionally, you can enter Intake and Authorization information and right click and select **Save** to save the new Plan of Care. Click the **Service Plan** tab.

4. Right click and select **Modify** to add tasks for the Caregiver.
5. After all tasks have been added, click **Save**.

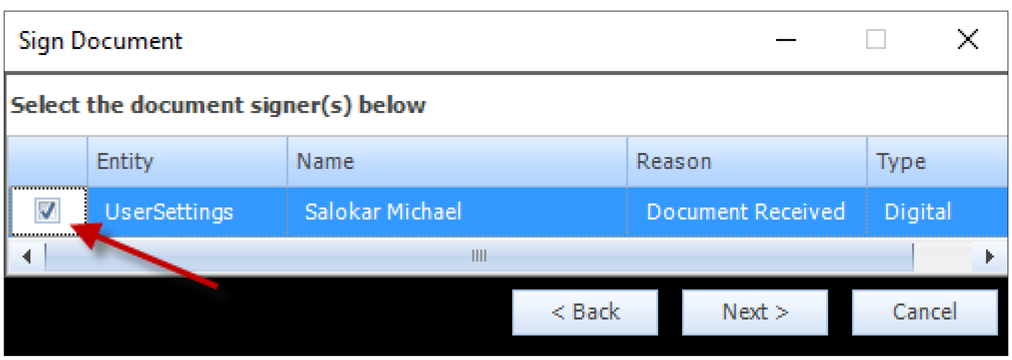


6. After all changes are completed and saved, click the **Publish Service Plan** 

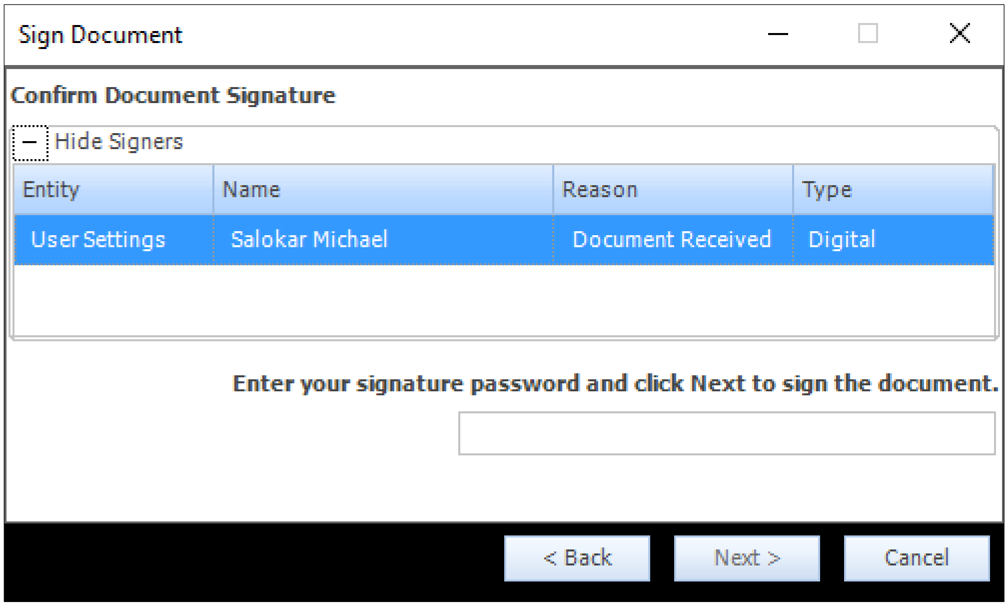
button. The Plan of Care Service Plan preview document dialog appears with all the tasks associated with the client.



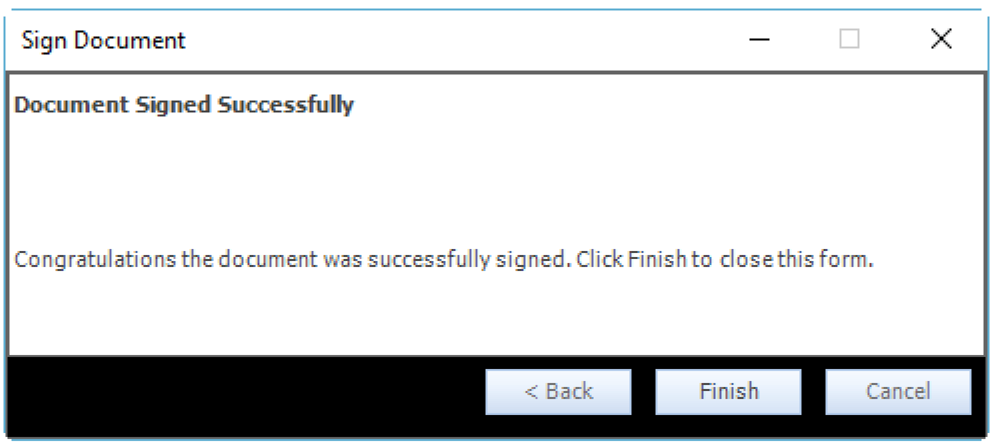
7. Review the Plan of Care Service Plan and click **Next**.
8. Select the document signer by checking the checkbox next to the signer.



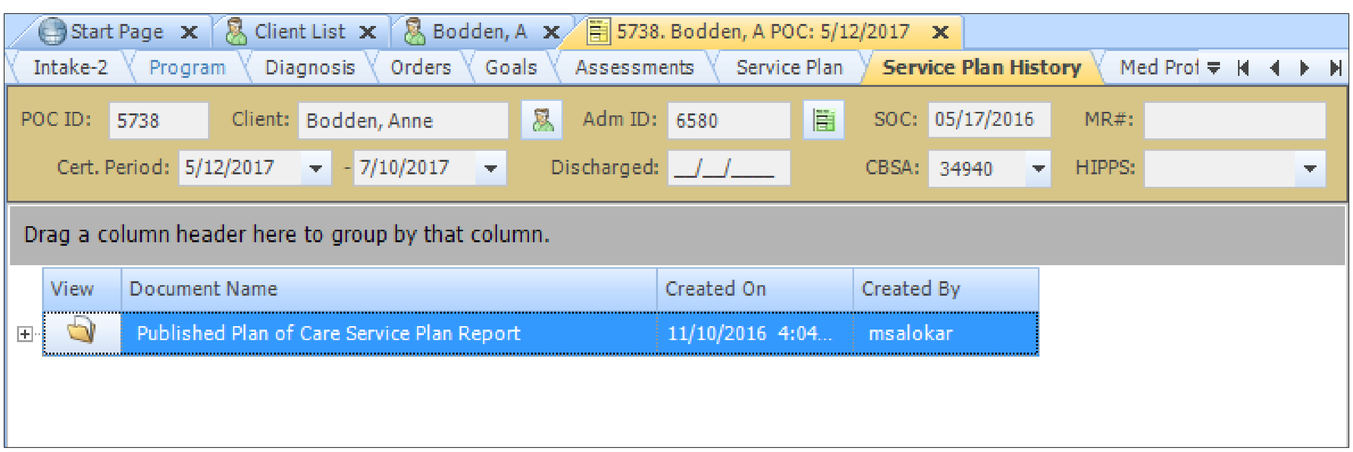
9. Click **Next** to sign the document.



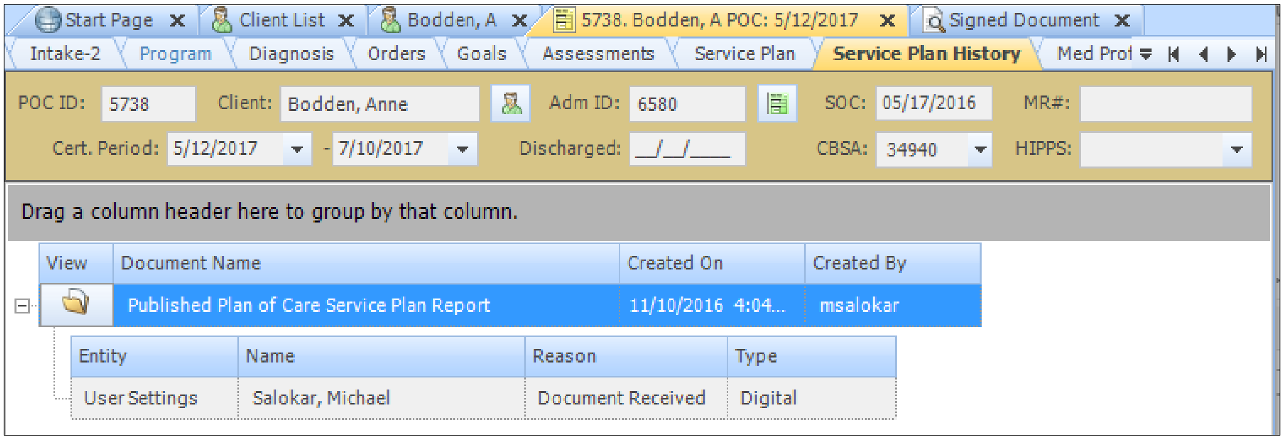
10. At the bottom of the window enter your signature password and click **Next**.



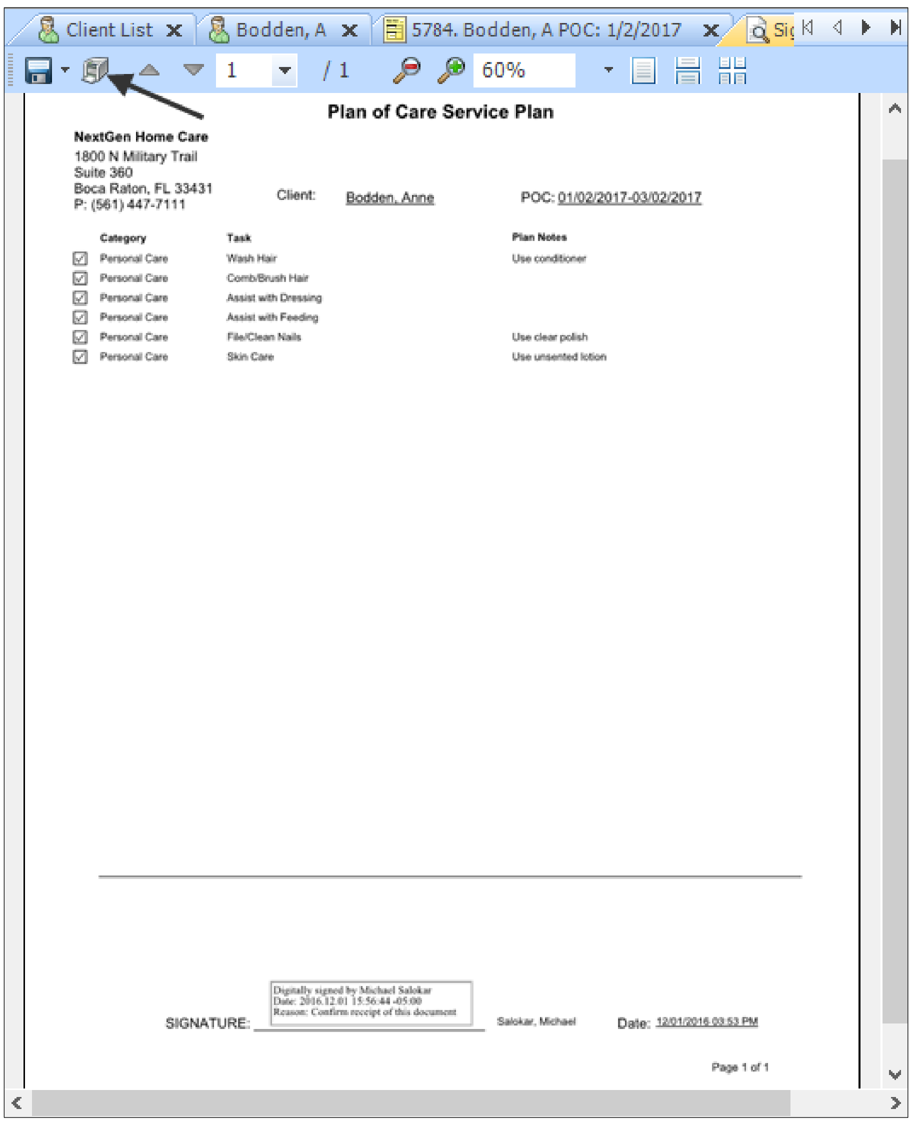
11. Click **Finish** to close the form.
12. Click the clients **Service Plan History** tab to view the Published Plan of Care Service Plan report record.



13. Expand the report to view information such as entity, name reason and type of signature.



14. Click the folder button to view the final Plan of Care Service Plan report.



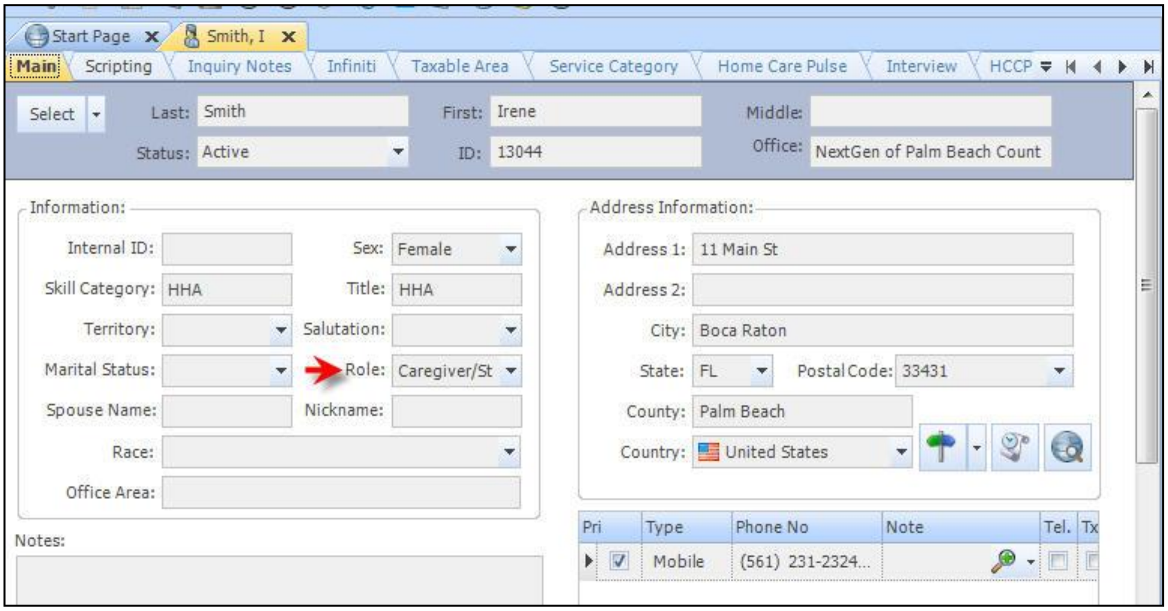
15. Click the **printer** button to print the report

Setting up the Caregiver as a Mobile User

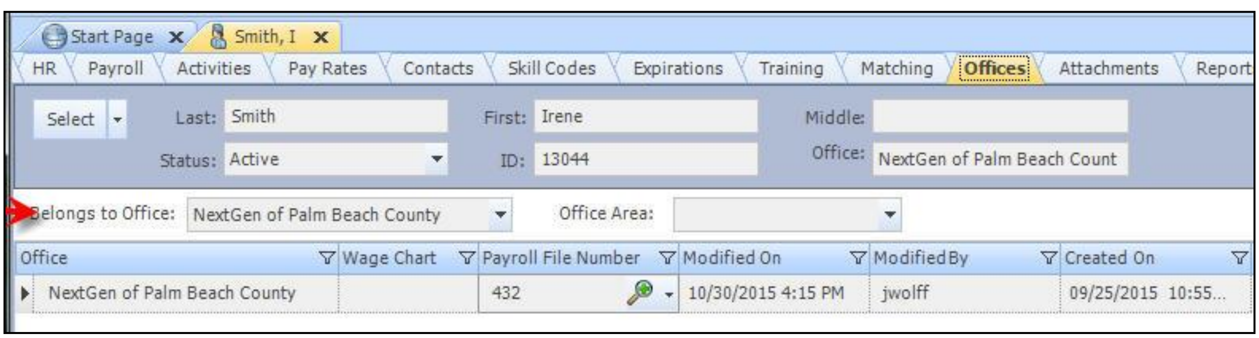
The caregiver, will need a caregiver record mapped to a User record. The User record will need permissions assigned.

Creating a Caregiver Record

When creating a record for the Caregiver, in the Information area, on the Role field select **Caregiver/Staff**. If you are manually creating the user record and assigning permissions. If using the Create New User Process, leave the default value of **Caregiver**.

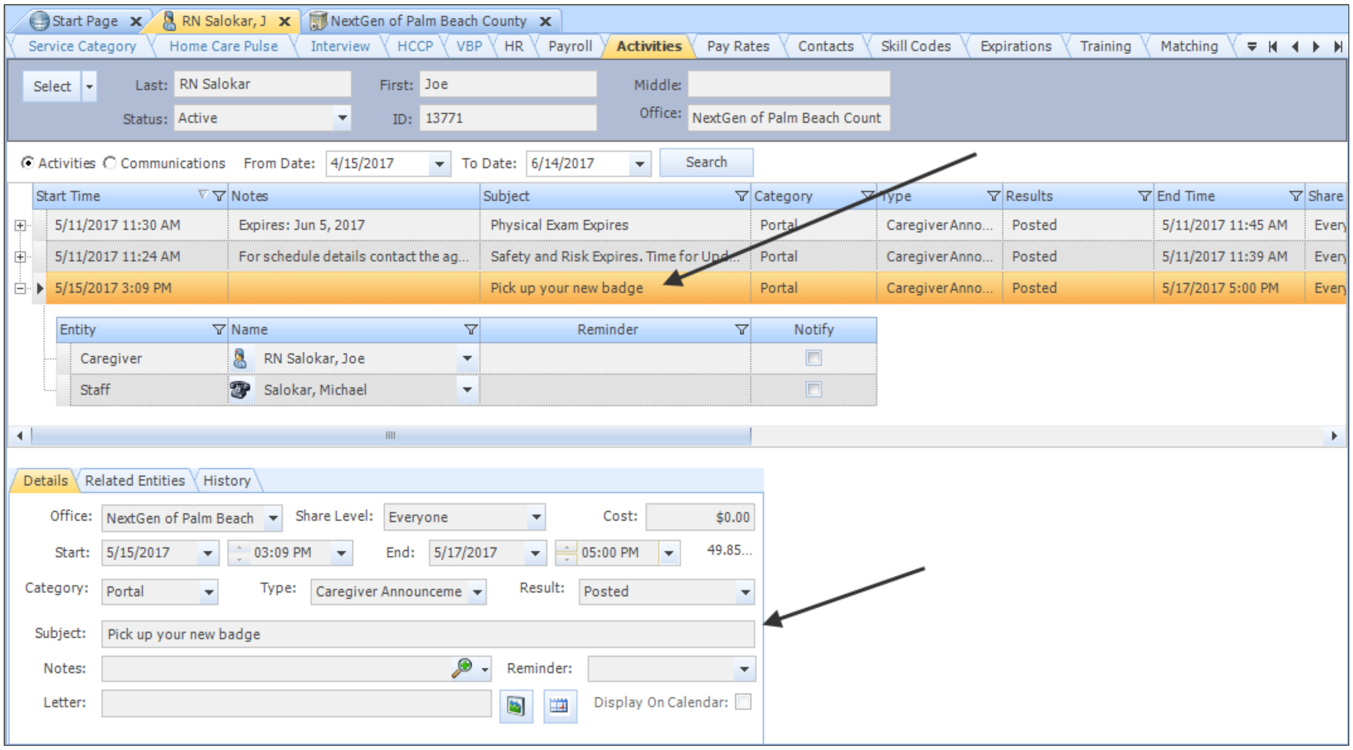


Set the Office assignment(s). The "Belongs To Office" is used for the Mobile Office level Caregiver Portal Announcements and Office Information. Set the office assignment(s) on the **Offices** tab for the selected caregiver.

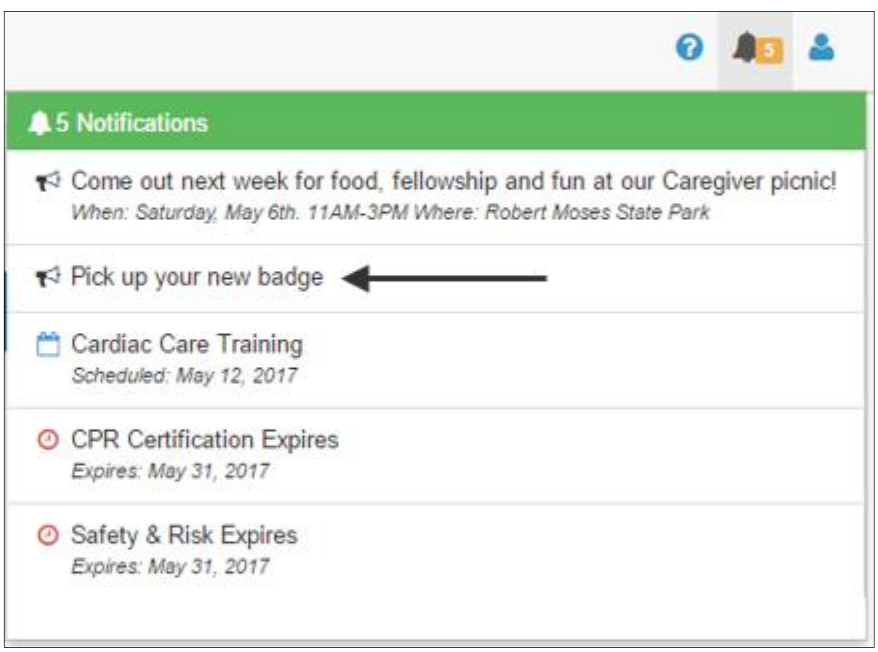


Caregiver Records for Portal Announcement Activities

Mobile displays the Caregiver level Caregiver Portal Announcements, showing the Subject and Notes. The Caregiver Activities must be created. On the details tab in the Category field, select **Portal**. In the Type filed select **Caregiver Announcement**. In the Result field select **Posted**. The activity displays on mobile device when the current date falls within the activity dates.



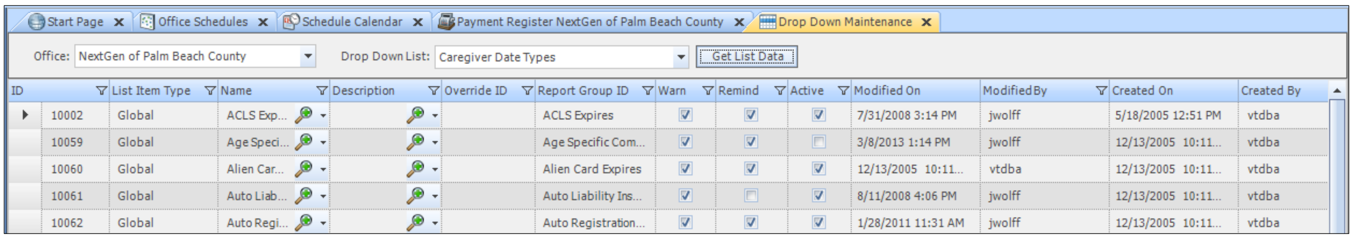
Mobile displays the Caregiver level Portal Announcement Activities on the Notifications pop-up.

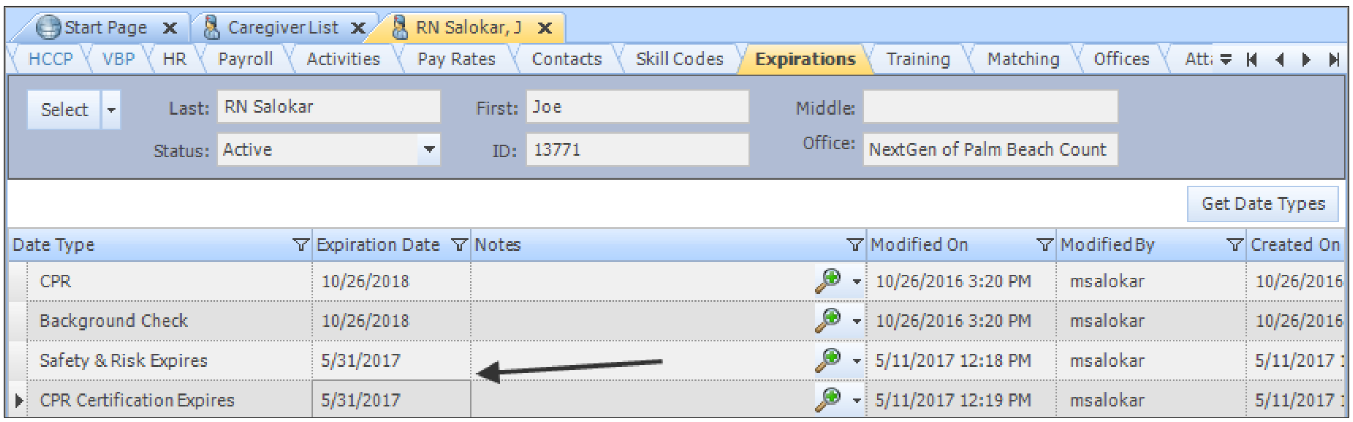


Caregiver Records for Expirations

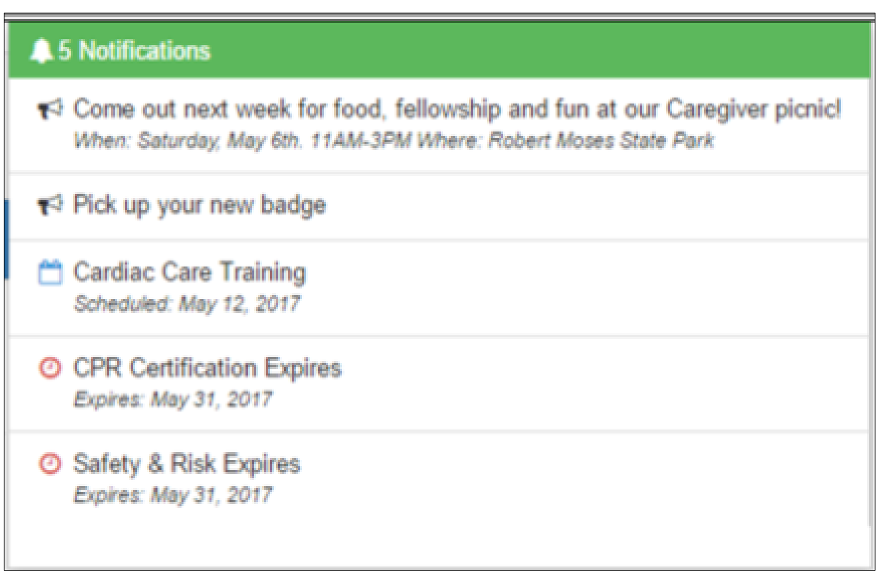
Create Expirations for the caregiver. Mobile displays the Caregiver Expirations, showing the Date Type and the Expiration Date (if it exists). The Expiration record must be configured with Remind set to **True** by clicking the checkbox and Active set to **True** by clicking the checkbox in Drop Down Maintenance > Caregiver Date Types list.

You must be in the correct date period (one year back from the current date or 30 days forward of the current date), or have a blank expiration date.



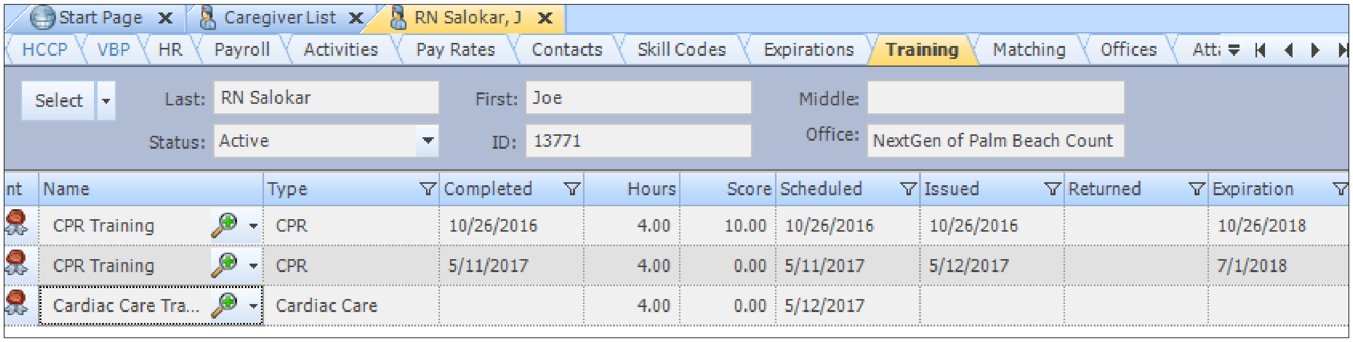


Mobile displays the Caregiver Expirations on the Notifications pop-up, as shown below.

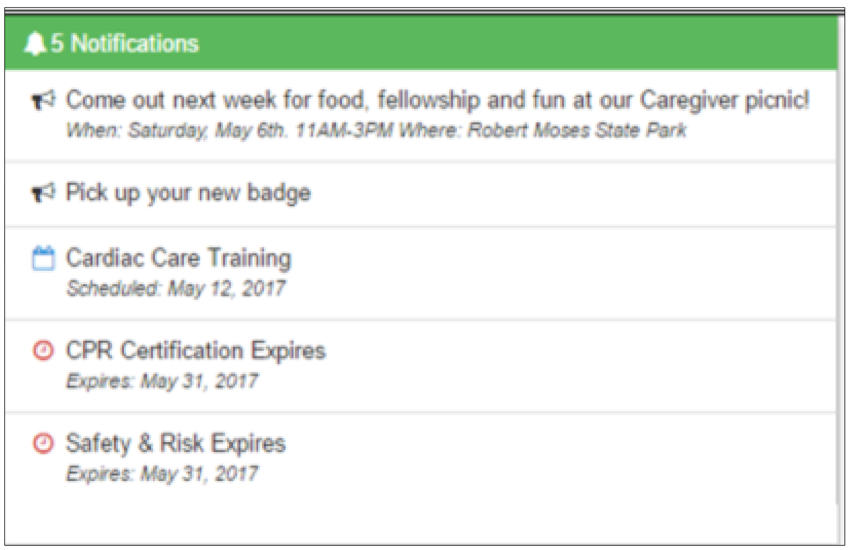


Caregiver Records for Trainings

Create Trainings for the caregiver. Mobile displays the caregiver training information, showing the Name and Scheduled Date (if it exists). The Training record must have a blank completed date to display in the mobile information pop-up list.

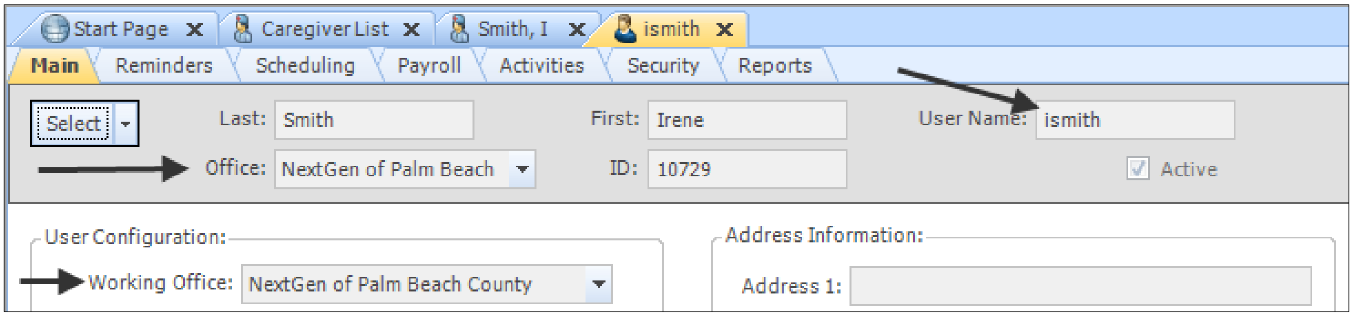


Mobile displays the Caregiver Training information on the Notifications pop-up list, as shown below.



Creating the User Record - Manual Process

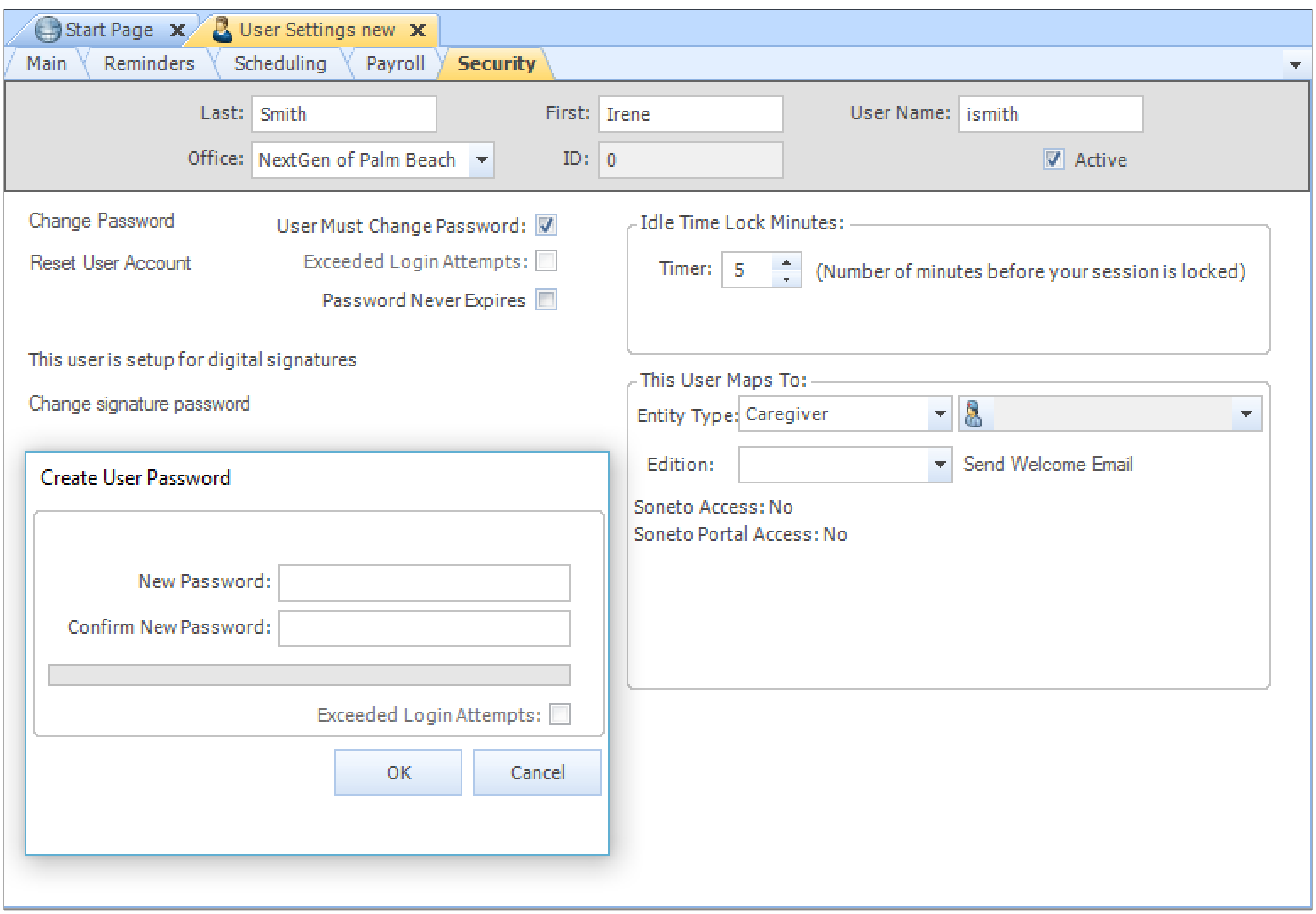
If you are not using the “Create New Users“ Registration process, then create a User record for the Caregiver. Set the Office and the Working Office. Assign a User Name.



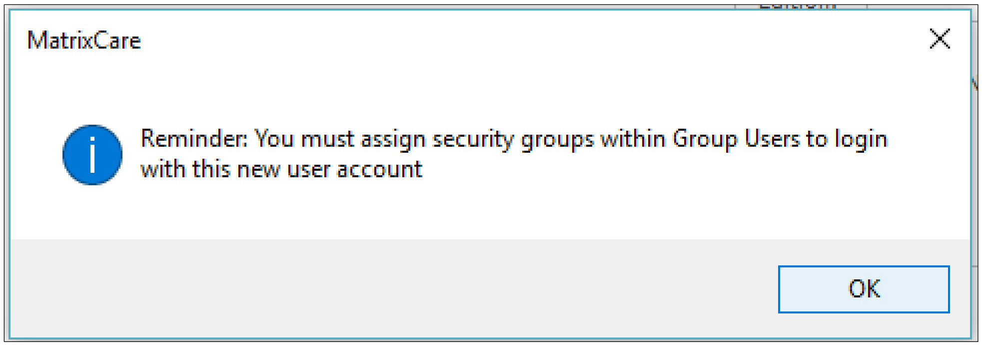
On the Security Tab, leave the **User Must Change Password** box checked once the record is saved. The Create User Password pop-up displays. Enter a new password, confirm the password and click **OK**.

This is the password that is given to the Caregiver, with the User Name, for login credentials. The Caregiver must change their password the first time when logging into MatrixCare Home Care Mobile.

Note: The Password uses the MatrixCare Home Care Policy, located in DB Admin Policy Details.

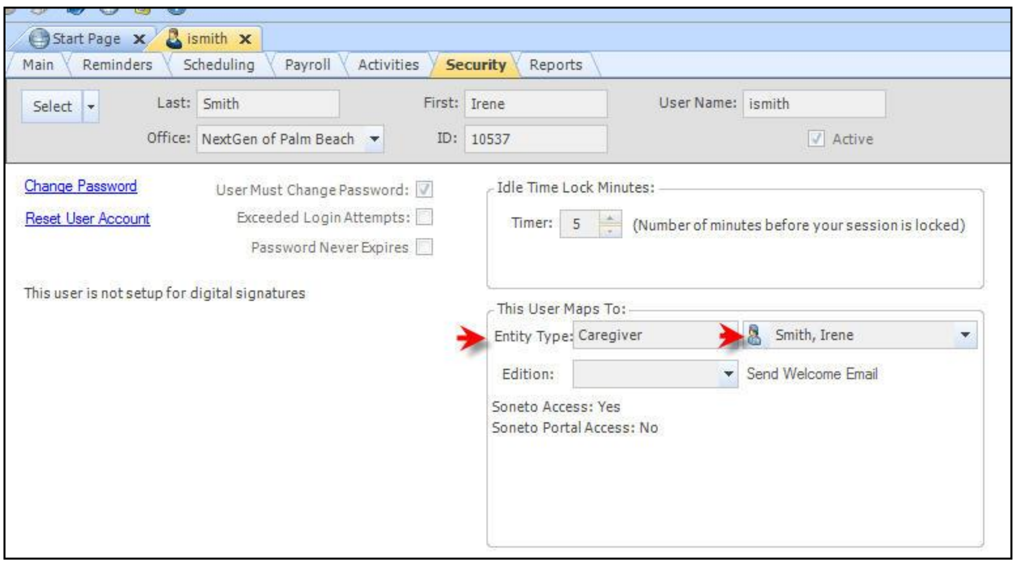


Map the User record to the Caregiver record by selecting Entity Type and setting it to **Caregiver** and then use the Name Search Editor to select a Caregiver record.



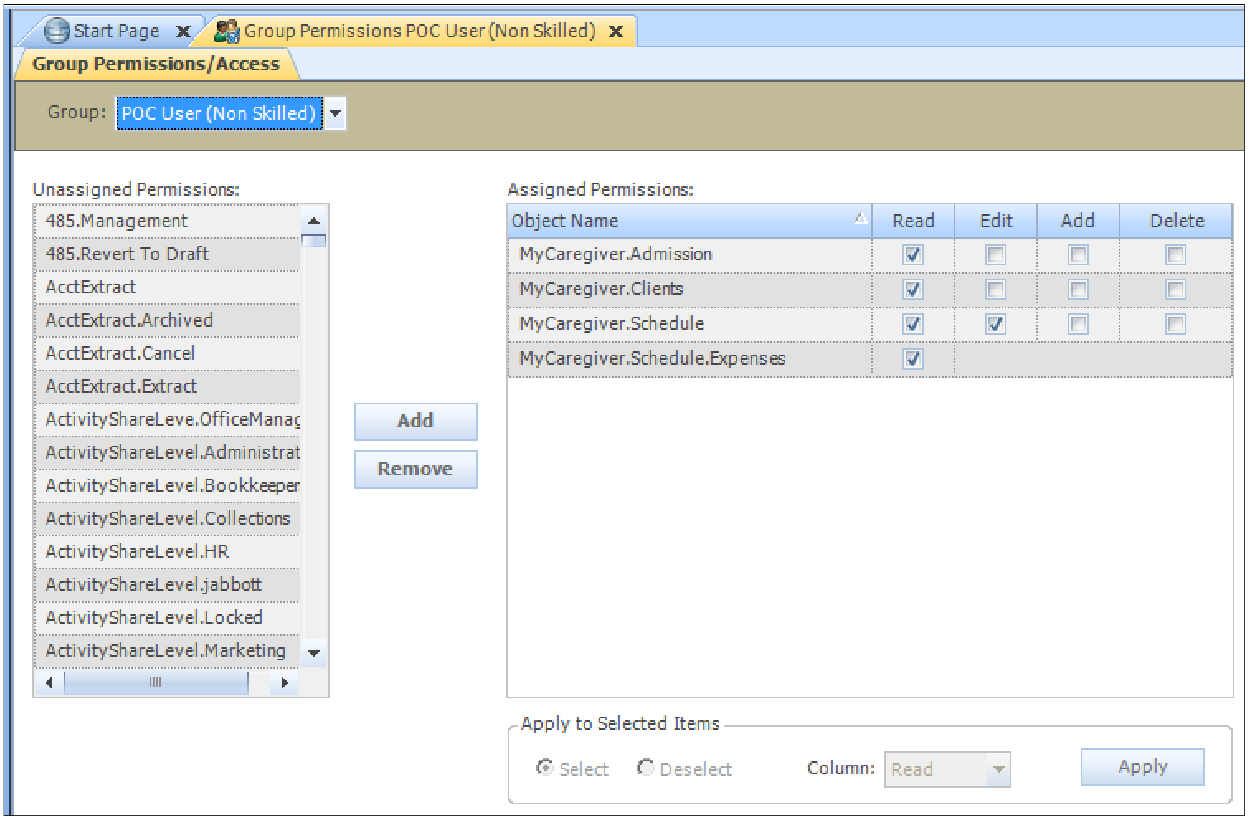
Important! In the “This User Maps To” area, make sure the Edition field is left blank.

Note: The Caregiver will set their 4-digit Digital Signature PIN when logging into MatrixCare Home Care Mobile, under their Account Settings.



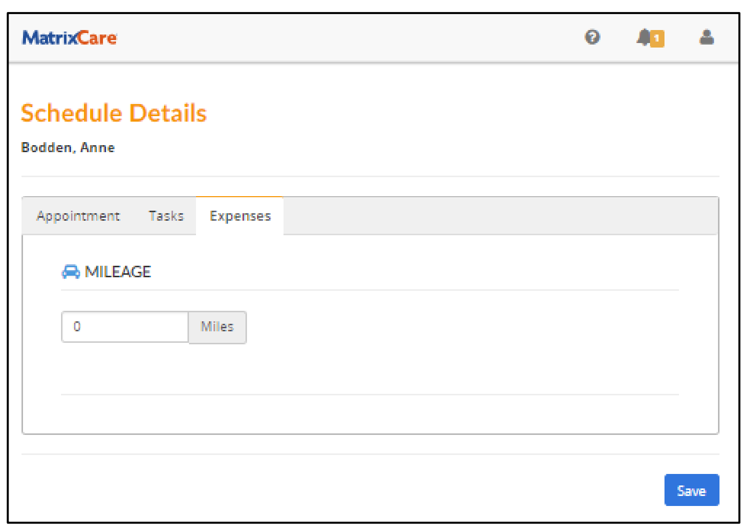
DB Admin Group Permission - POC User (Non Skilled)

The System ID, “POC User (Non Skilled)“ permission group is assigned to users with non-skilled disciplines, such as Home Health Aides, that log into MatrixCare Home Care Mobile.



Optionally Hiding the New Expense Button from the Home Health Aide

The “New Expenses” button is now permission driven. The permission “**mycaregiver.schedule.expenses**” controls if the user can view the “New Expenses” button and Expenses section on the Schedule Details>Expenses tab. The permission group POC User (Non-Skilled) includes this permission, so the “New Expenses” button on the Expenses tab is available by default for all mobile users.

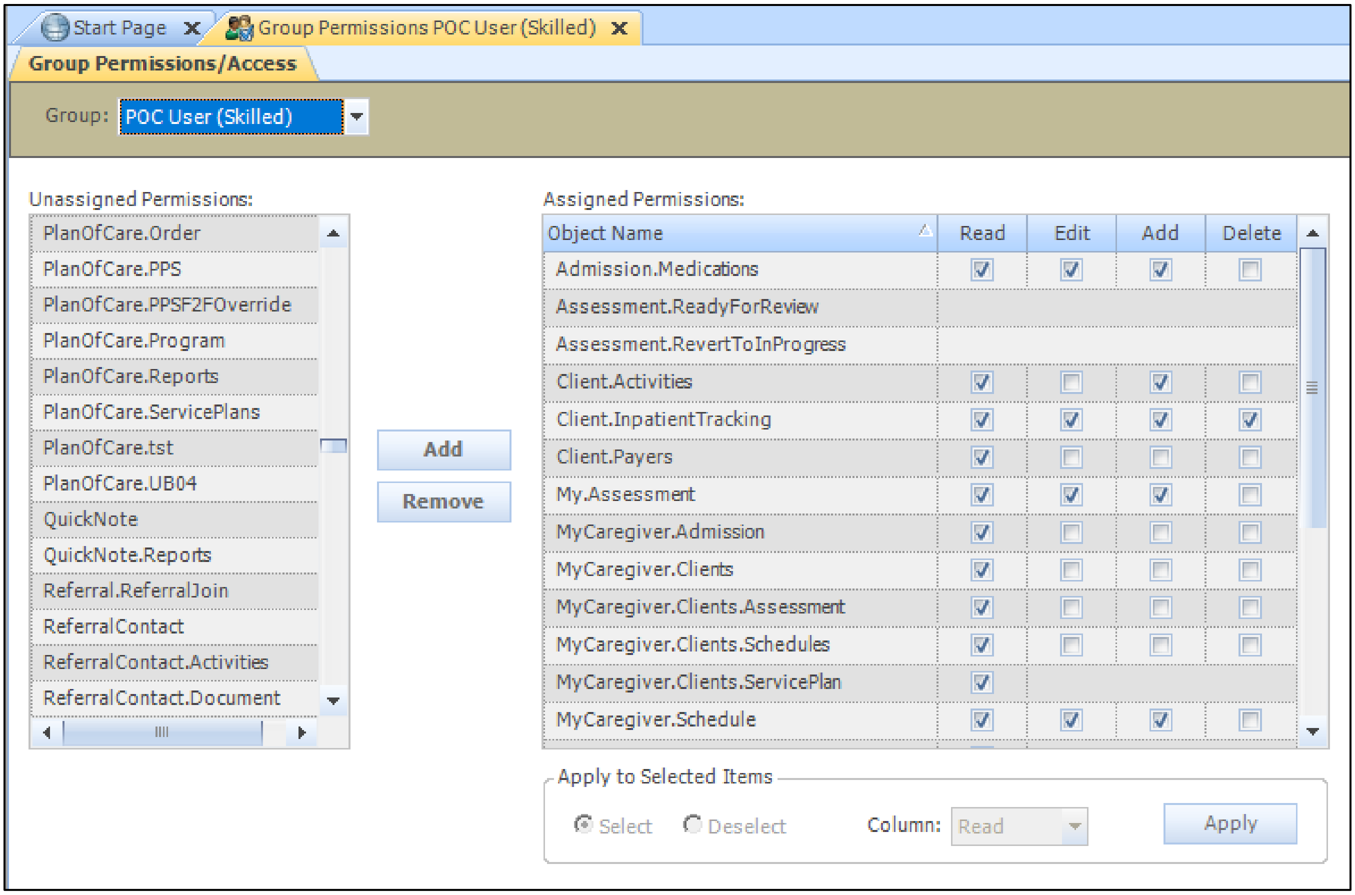


The Office Administrator has the option to hide the “New Expenses” button for non-skilled users by creating a new permission group and not assigning it the permission: “**mycaregiver.schedule.expenses**”.

Then navigate to Group Users and add that permission group to non-skilled users that do not need to enter expenses other than mileage.

DB Admin Group Permission - POC User (Skilled)

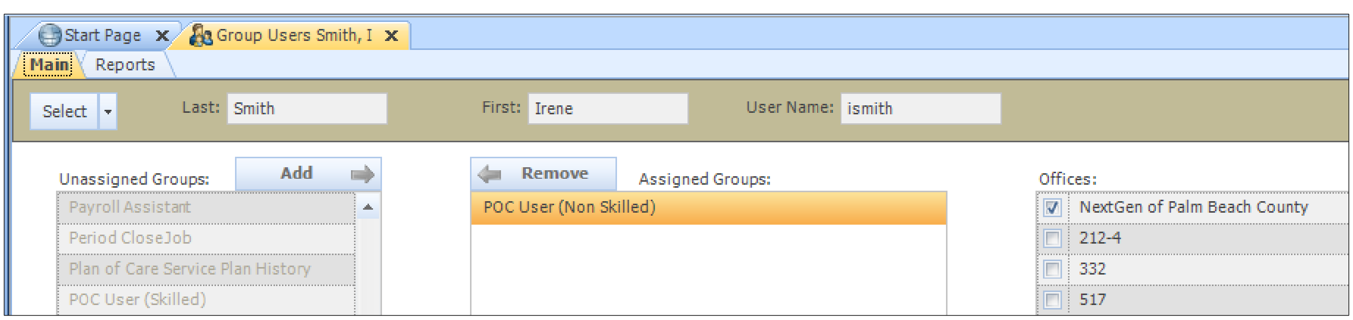
The System ID, “POC User (Skilled)” permission group will be assigned to users with skilled disciplines such as RNs who will log into MatrixCare Home Care Mobile.



DB Admin Group Users and Office Permissions

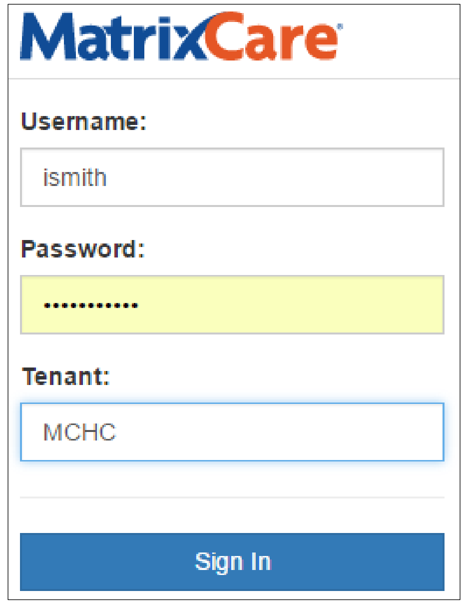
Assign the “POC User (Non Skilled)” or “POC User (Skilled)” permission group to the Caregiver or RN. Assign the appropriate Office(s). Verify the user is assigned permissions to their “Belongs to” office and their Working Office as defined on their user record. Offices on the user’s Mapped To Caregiver record must also match the user’s permission offices.

Important! At least one Office must be selected.



Logging into the MatrixCare Home Care Mobile

The Caregiver will access MatrixCare Home Care mobile from a URL that is bookmarked on the phone. The login page is the first page shown. The office provides the Caregiver with a User Name and Password. The user will enter the following information on the login page.

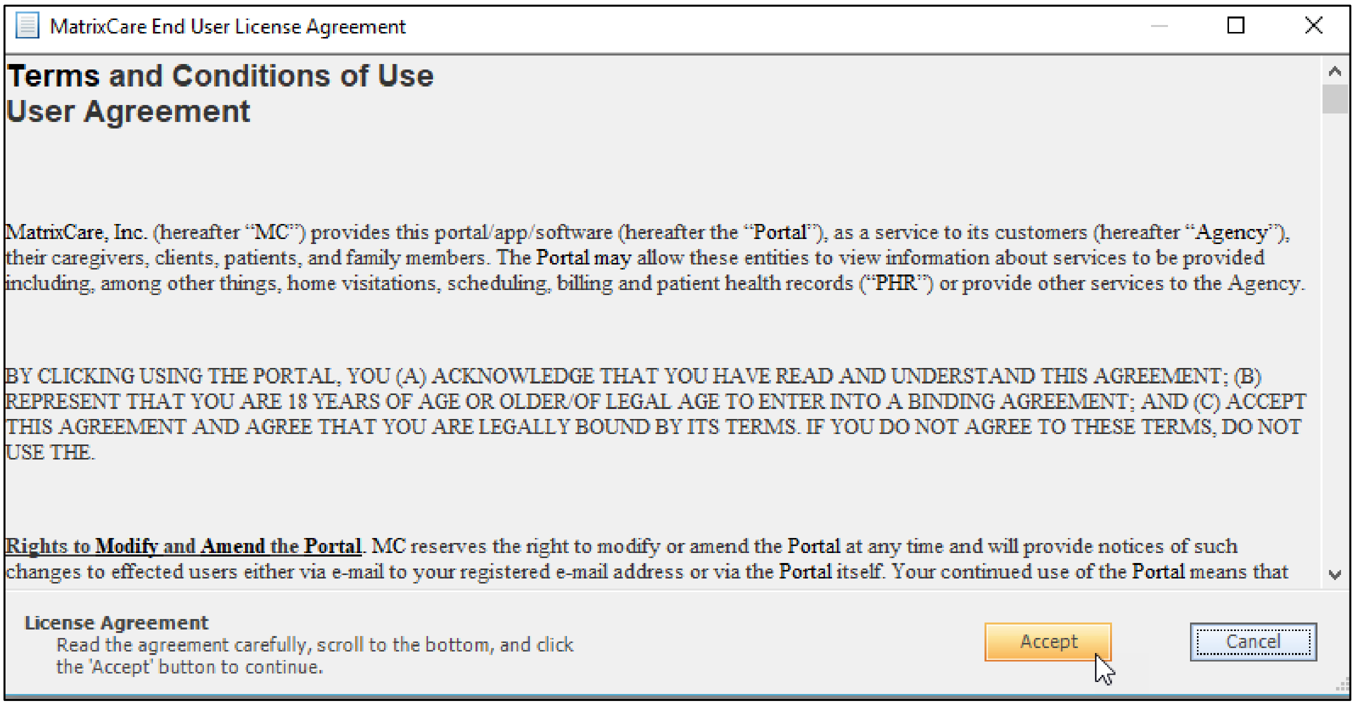


The Tenant Code is a unique identifier per database, assigned during Implementation and visible in the MatrixCare Home Care Management site. This should default from the URL that was used to access MatrixCare Home Care Mobile, shown below.

If the Tenant code is not populated in the Sign In page, then the URL is not correctly entered in the web app.

Accept EULA

Please review the updated EULA and scroll to the bottom. Once at the end of the EULA, the Accept button enables, allowing users to click **Accept**. Once users accept the EULA (in either the back office or mobile), this prompt will not appear again. Once the user accepts the EULA, they will not see this page again unless a new version of the EULA is published.



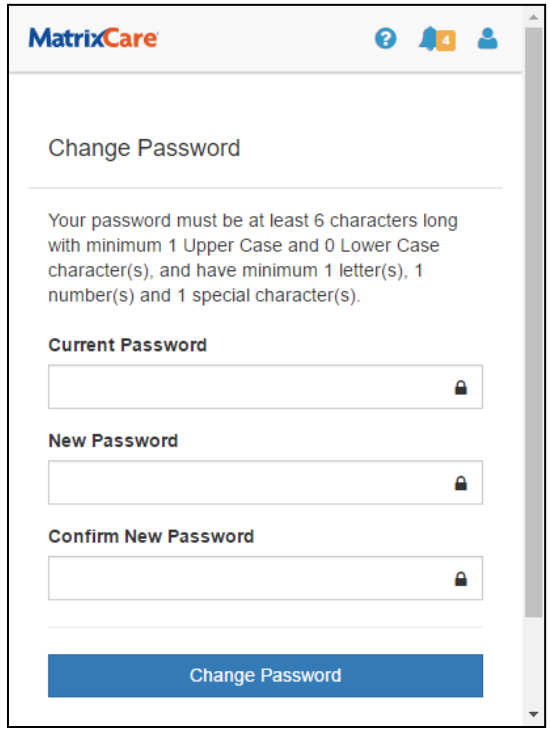
Change Password

The Change Password page displays next. The caregiver will enter their current password (assigned by office) and then a new password is required and must be confirmed, pressing **Change Password**.

The Password Policy is shown to assist you in creating a new password.

Note: The caregiver can change the password at any time, using the “Manage Password” option in the Account Settings menu.

Upon login, MatrixCare Home Care Mobile opens to the caregiver’s Home Page.



Creating the Mobile Signature PIN

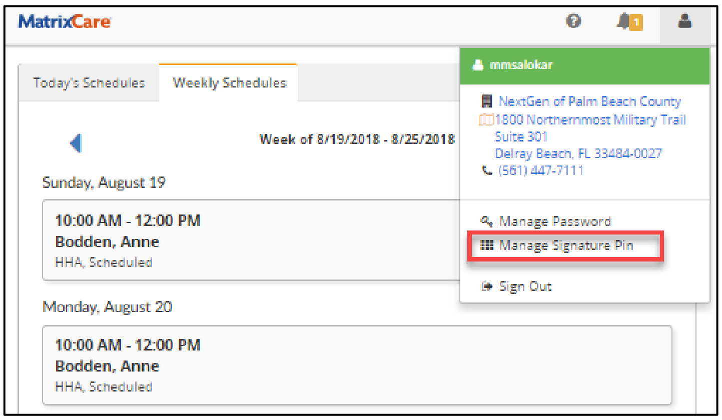
Creating a mobile digital signature PIN is not required, but it is highly recommended the caregiver do this as soon as possible. Do not wait until first check out to sign in for the first time and then have to stop and go back and set the digital signature PIN.

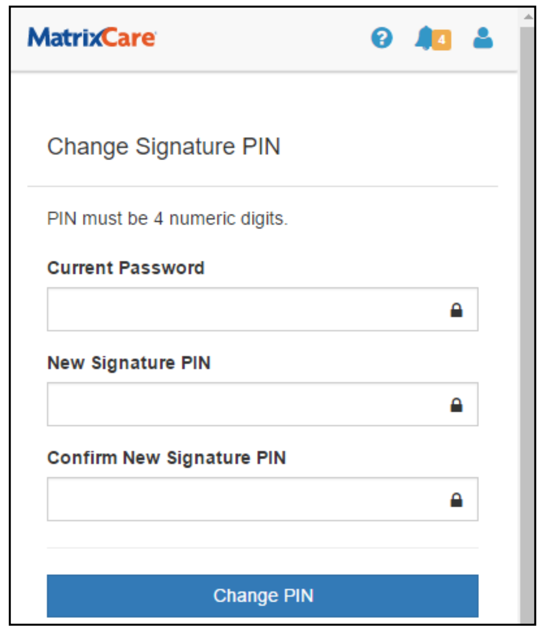
To Create the digital signature PIN:

1. Press **Manage Signature Pin** option in the Account Settings drop down list.

The Change Signature PIN page will display. The caregiver will enter their current password and then will enter a PIN and confirm it by entering it again.

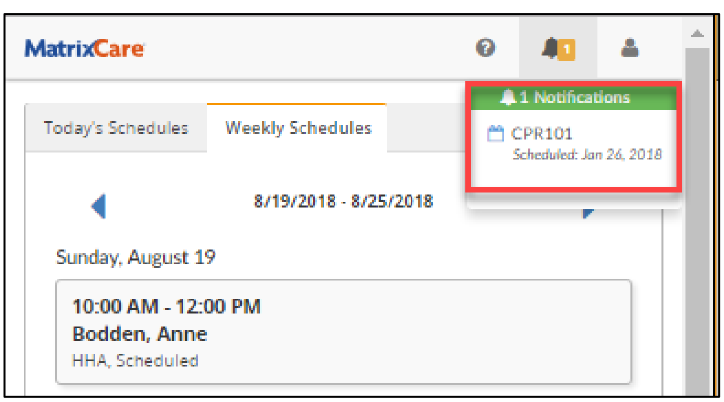
Press **Change PIN** and enter **4 numeric digits** (any 4-digit number will work).





Changing your Expiring Signature Pin

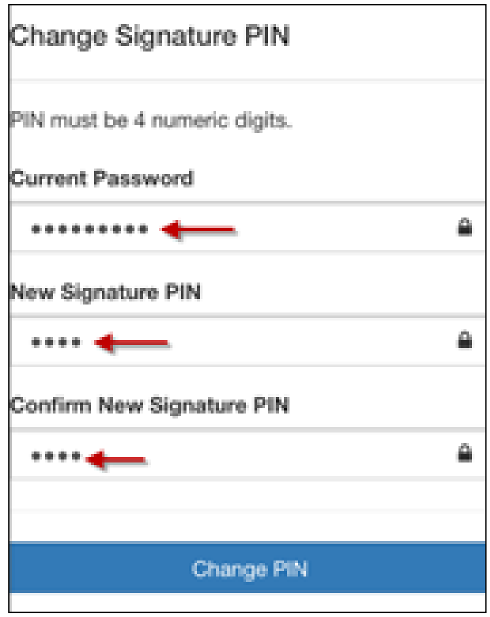
When a user's PIN is about to expire, a notification is displayed to the user notifying them that their Signature PIN is expiring on a specified date. A number on the bell is displayed with a red background when there is a PIN expiration warning. Your PIN should be updated before the expiration date.



To create or change your Signature Pin:

1. Press the **Account Settings**  button on the tool bar.
2. Press **Manage Signature Pin**. On the Change Signature PIN page, enter your **Current Password**, enter a 4-digit **New Signature PIN** and then re-enter it again to **Confirm** New Signature PIN.

   Note: The Signature PIN can be any 4 numeric digits.
3. Press **Change PIN**.



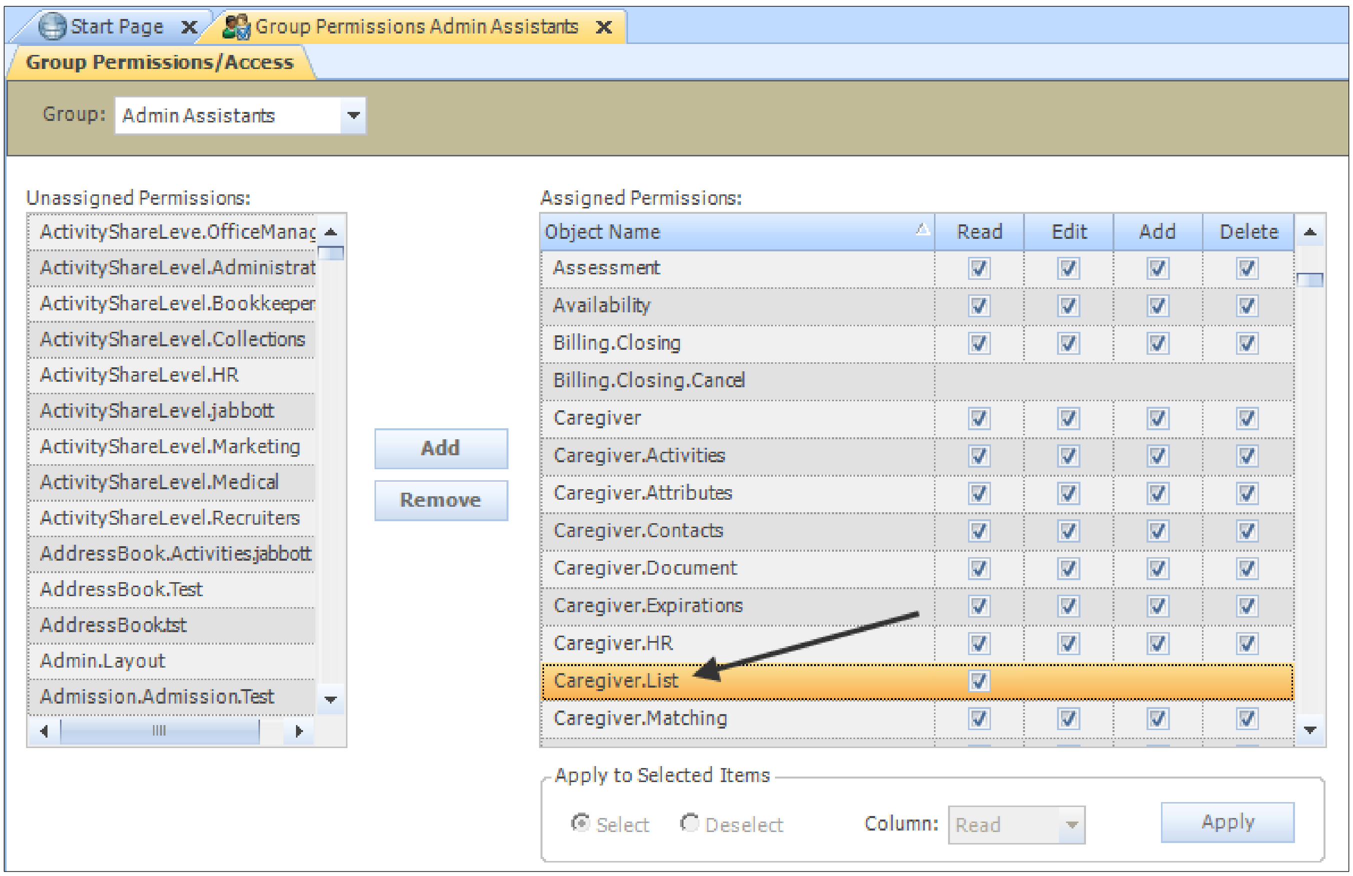
Note: When a user's PIN is expired and the user enters their PIN and presses the **Next** button during the checkout process, the PIN field will be disabled and the Next button is disabled. A validation message displays stating the "*PIN is expired" along with a blue link to "Reset your PIN". Press the **Reset your PIN** link to open the reset PIN page and update your PIN. You cannot continue to check out with an expired PIN unless you press the **Skip** button.

User Record - Create New User and User Registration Process

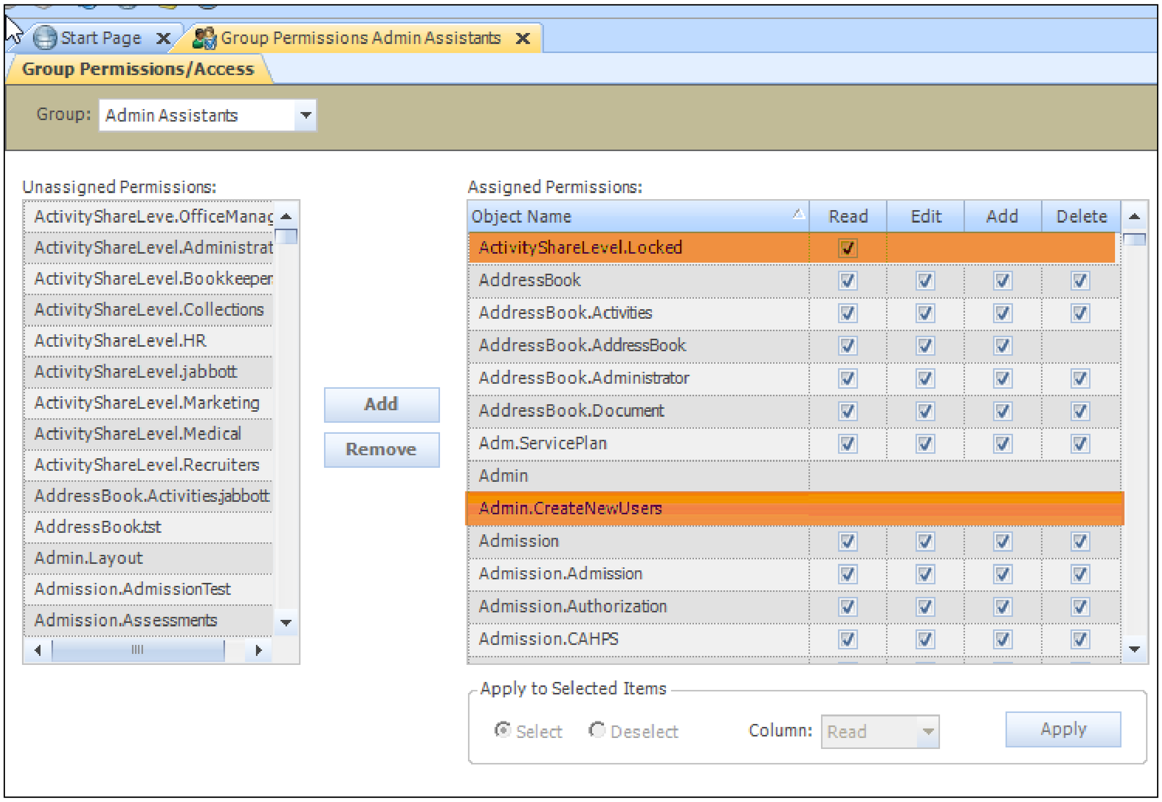
The system provides the ability to create Mobile Users from Caregiver records. This process sends the caregiver a Registration Invite email and a Registration Verification Code text (there is no charge for this text). The caregiver uses these to create a MatrixCare account and log into MatrixCare Home Care Mobile.

Permissions

The “Create New Users” tool is available from the Caregiver List. You will need permission to the Caregiver List.



You will need the *Admin.CreateNewUsers* permission to access the “Create New Users” option on the Caregiver List. You will also need the *ActivityShareLevel.Locked* permission to see the User Registration Activities that auto-creates when you create new users.



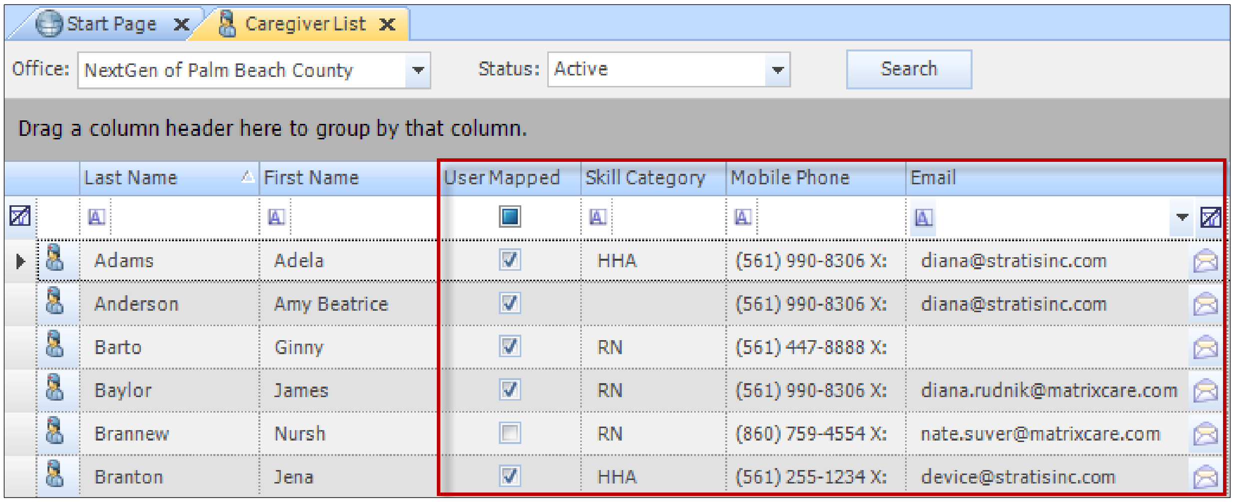
Caregiver Records

Review your caregiver records. Caregivers need the ability to receive emails and texts on their phones.

Note: If you have a caregiver or RN that cannot receive emails and texts on their phone you will need to manually create a User record (setting a user name and a password that should be changed at first login), map it to the Caregiver record, and assign the “POC User (Non-Skilled)” or “POC User (Skilled)” skill category, Group permission and Office permission(s). You must contact the user and provide the user name and password, along with the Mobile URL they will need to add to their phone and use to login to MatrixCare Home Care Mobile.

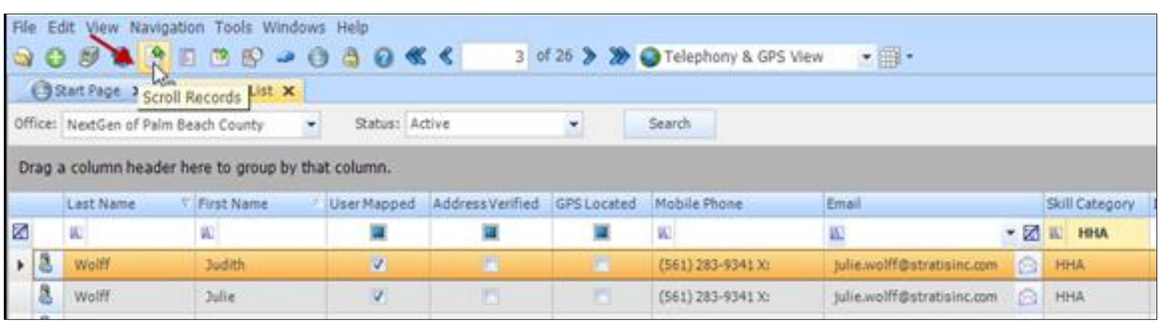
Open the Caregiver List. In our example, we created a Layout and added the columns we need to review for our caregiver’s. These are the “User Mapped”, “Skill Category”, “Mobile Phone” and “Email” columns.

Note: When creating a new caregiver record, the Skill Category is assigned on the Main tab. For caregiver records already saved, the Skill Category needs to be assigned on the Skill Codes tab.

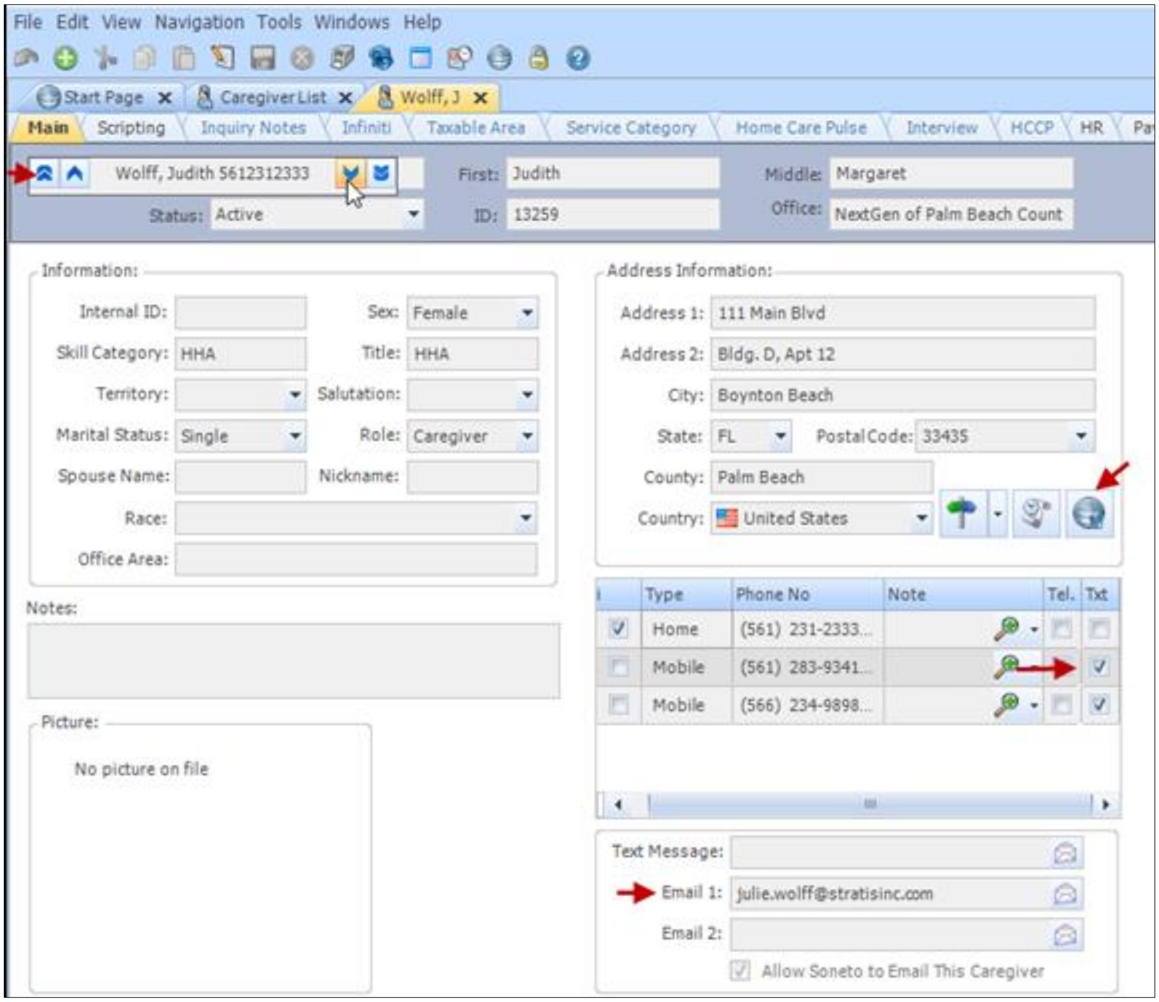


- **User Mapped** - This is checked if the caregiver is mapped to a user record. Caregiver's that are already mapped are excluded from the "Create Users" Registration process. If you have a mapped caregiver but they are not set up for MatrixCare Home Care Mobile yet, you will need to follow the manual process noted above.
- **Skill Category** - This identifies whether the caregiver is in a skilled or non-skilled group. The information in the Skill Category column is the same information that displays in the User Setup page in the Skill Category column. The Skill Category information is coming from the caregiver's record. Depending on the skill category (POC skilled or POC non-skilled) a user has, they will view different information on their mobile phone.
- **Mobile Phone** - The caregiver needs a phone that can receive texts. This is typically the Mobile phone on their record. You want to check that the phone can receive texts on is the phone number checked for "Txt" on their record. If the caregiver has more than one phone checked for "Txt" then the system uses the first text enabled phone number.
- **Email** - The caregiver needs a phone that can receive emails. This needs to be the same phone that is used to receive texts. You may want to check that the address in the Email1 field on the record is the email address they receive on the phone, and that it is the same phone that is set up to receive texts.

Use the Scroll Records feature to go through each caregiver's record and check for the items listed above.

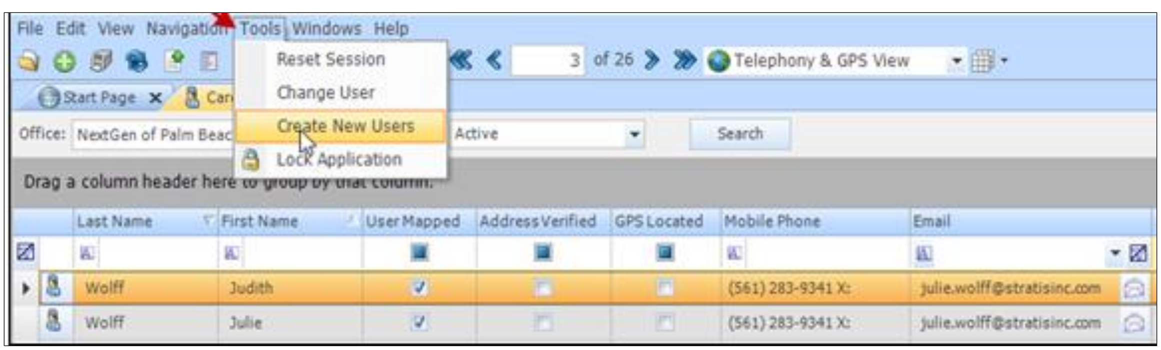


The information is on the Main Tab. Check the fields, modify as necessary and click **Save**. Then place your mouse over the **Select** button to show the scroll arrows, and use them to move to the next record in the list.



Create New Users

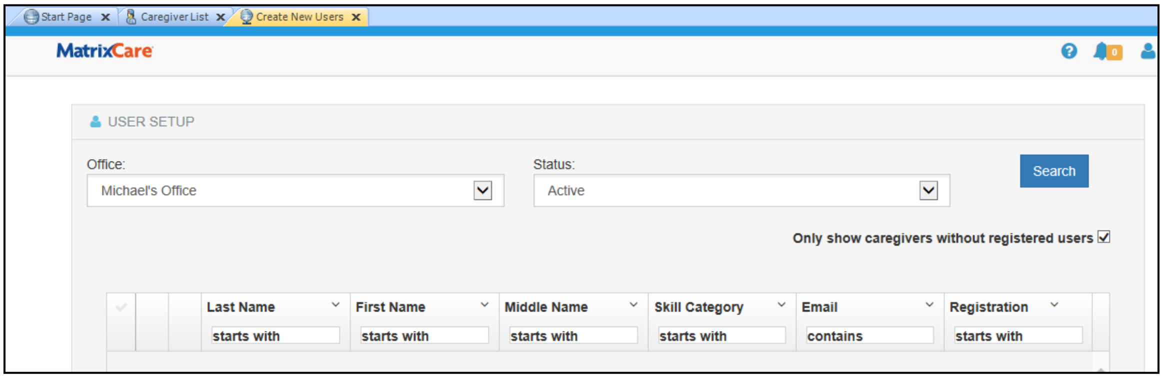
With the Caregiver List loaded, click the Tools option in the main toolbar. Click **Create New Users** option.



Note: When creating a new user, your system must have Microsoft Internet Explorer version 9.0 or above.

User Setup Page

You will be logged into the User Setup web page from within the system.

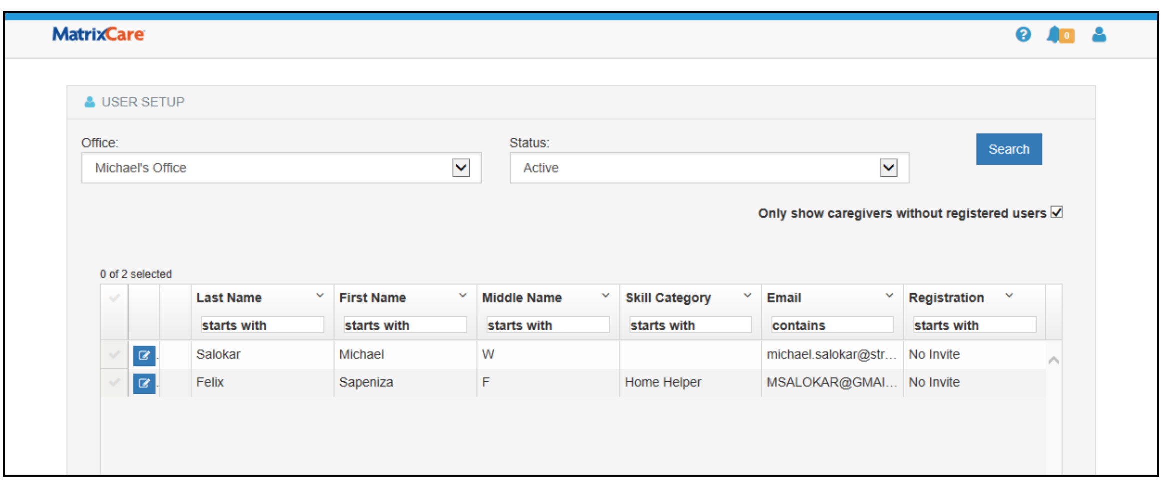


- **Office** - Defaults to your working office. The drop down list will include offices you have permission to.
- **Status** - Defaults to Active. The drop down list includes all the caregiver statuses for the office selected.
- **Search** - Click the button to populate the list of caregivers.
- **Only show caregivers without registered users** - Defaults to checked. Caregivers that have not started the registration process or have not completed the registration process are returned in the Search.

  Note: Caregivers that are mapped to a user record are not returned with this option. These caregivers are returned when this option is unchecked, but you cannot select them to go through the registration process. You must use the manual process to set these caregivers up to use MatrixCare Home Care Mobile.

Search

Click **Search**.



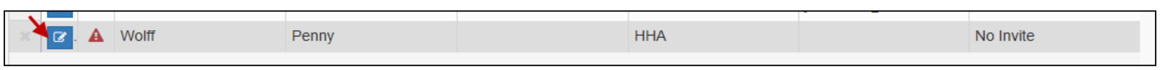
- **Selected** - Defaults to unselected. Click on the row to select it. Records with Warnings cannot be selected.

- **Edit button** - Click the button to open a pop-up that shows the caregiver's phones and email. You can edit the information from this pop-up. See details below.
- **Warning** - Displays if the caregiver record is missing a text enabled phone, an email address or a skill category.
- **Last Name** - Filterable column that displays the Last Name from the caregiver's record.
- **First Name** - Filterable column that displays the First Name from the caregiver's record.
- **Middle Name** - Filterable column that displays the Middle Name from the caregiver's record.
- **Skill Category** - Filterable column that displays the Skill Category from the caregiver's record.

  Note: Filter this column for the Skill Category of your caregivers that will use MatrixCare Home Care Mobile. In our example, we typed Caregiver into the field to filter the list.
- **Email** - Displays the Email1 address from the caregiver's record.
- **Registration** - Displays the status of the registration process for the caregiver.
  - **Registered** - The caregiver record has at least one mapped user.
  - **Pending** - An unexpired invite was sent but a user record is not yet created.
  - **Expired** - An invite was sent, it expired, and a user record is not created.
  - **No Invite** - No invite has been sent and no mapped user record exists.

Required Fields

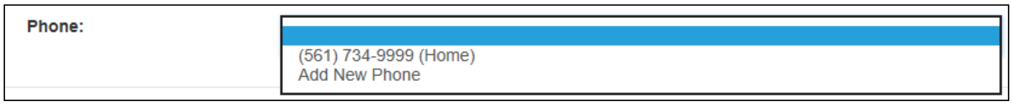
Click **Edit** on the row with the Warning.



The pop-up displays the missing required fields. In our example, the caregiver record is missing the Email1 address and a text enabled phone number.

- **Email** - Type the email address that the caregiver uses to receive emails on their phone. The address will be added to the Email1 Address field on the caregiver's record when you Save.

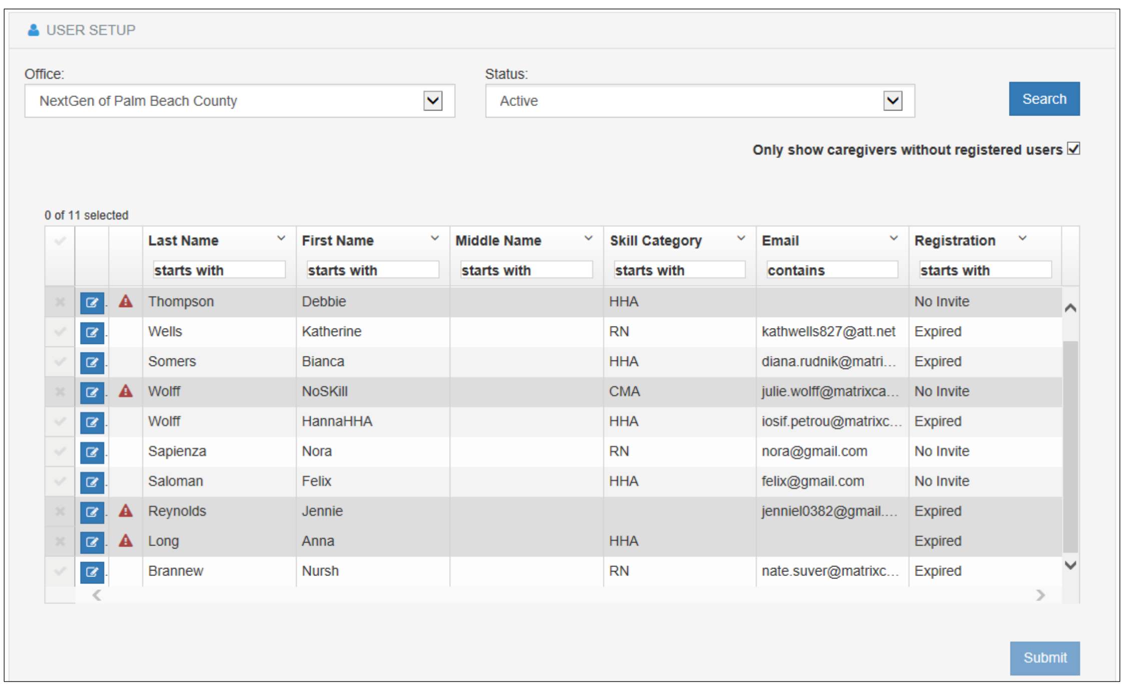
- **Phone** - Click the drop down on the field.



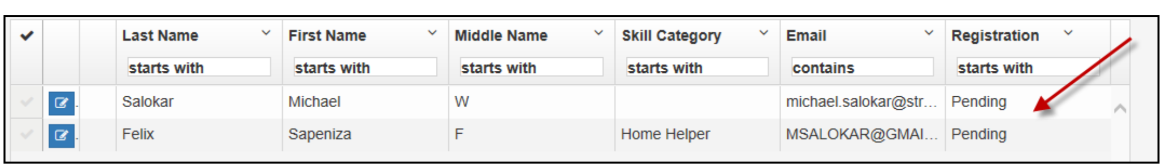
  - Existing phones from the caregiver's record will display. Select the number that the caregiver uses to receive texts on their phone. The number will be checked for "Txt" on the caregiver's record when you Save.
  - Select "Add New Phone" if none of the existing phones are the number they use to receive texts on their phone. Enter the number the caregiver uses to receive texts on their phone - this should be the phone they use to receive emails. That number will be added to the caregiver's record as checked for "Txt" when you Save.
- **Skill Category** - Click the down arrow to select a value. This field is required and only one skill can be assigned to a caregiver.
- **Cancel** - Changes will not be saved and the pop-up will close.
- **Save** - Changes will be saved and the pop-up will close. If the required fields have been saved, the Warning will clear.

Submit

Select the caregiver(s) you want to send User Registration Email Invites. You can select individual rows or click the button on at the top of the Select column to select all rows. Only records that are not in 'Registered' status and have no warnings can be selected.



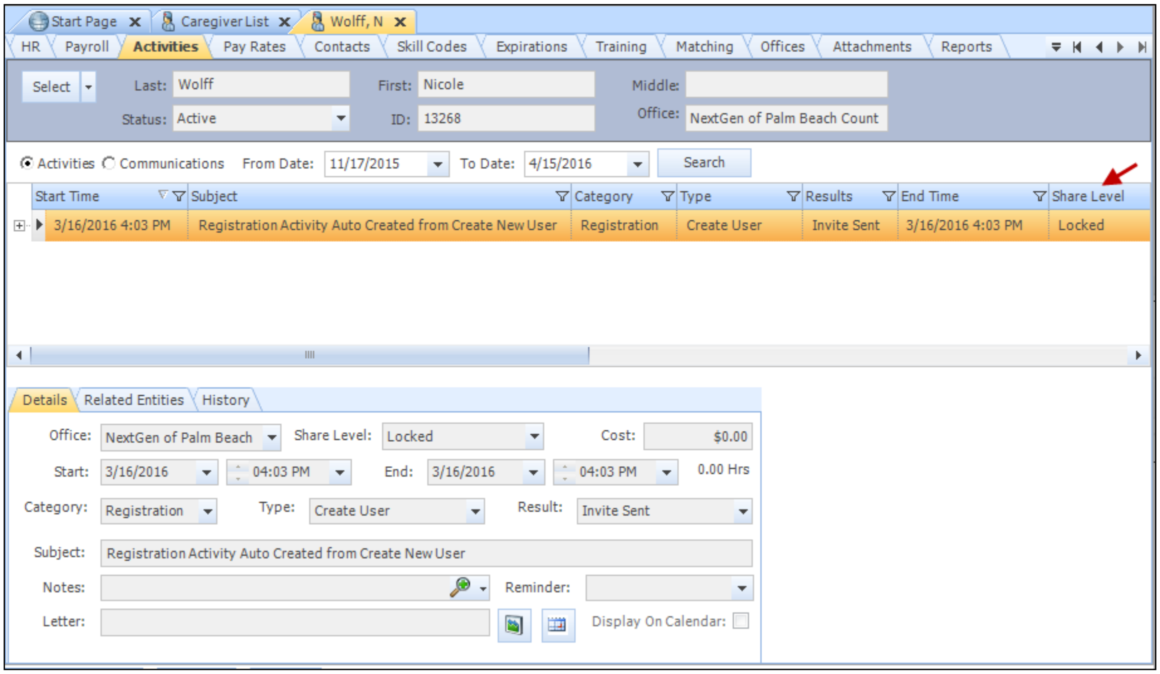
The Registration Status will update to "Pending."



Registration Activity - Invite Sent

An activity record will be auto created and placed in the caregiver's record and the record of the user who clicked **Submit**. The Category is **Registration**, the Type is **Create User**, the Result is "Invite Sent", and the Share Level is "Locked". Once these activities have been completed they cannot be deleted.

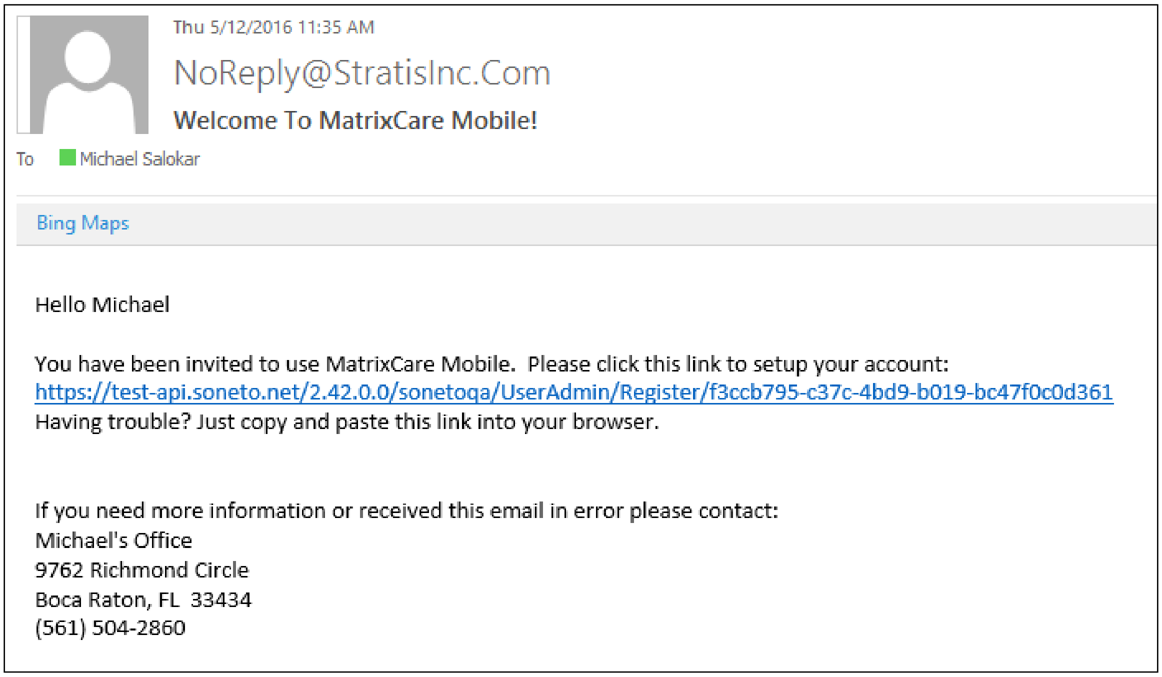
The activity tracks the status of the caregiver's registration process. The activity record is not editable by the end user. The Result is updated as the caregiver moves through the process.



Registration Invite Email

The Registration Invite Email is sent to the address specified for the caregiver on the Create User Setup page. This should be received on their mobile phone, and be the same mobile phone that they use to receive texts.

The caregiver presses the link in the body of the email.


Thu 5/12/2016 11:35 AM
NoReply@StratisInc.Com
Welcome To MatrixCare Mobile!
To Michael Salokar
Bing Maps

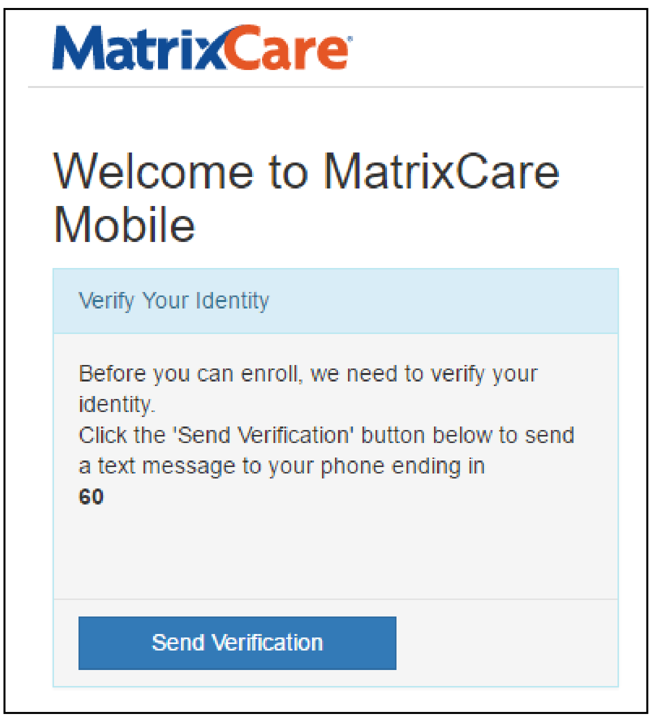
Hello Michael

You have been invited to use MatrixCare Mobile. Please click this link to setup your account:
https://test-api.soneto.net/2.42.0.0/sonetoqa/UserAdmin/Register/f3ccb795-c37c-4bd9-b019-bc47f0c0d361
Having trouble? Just copy and paste this link into your browser.

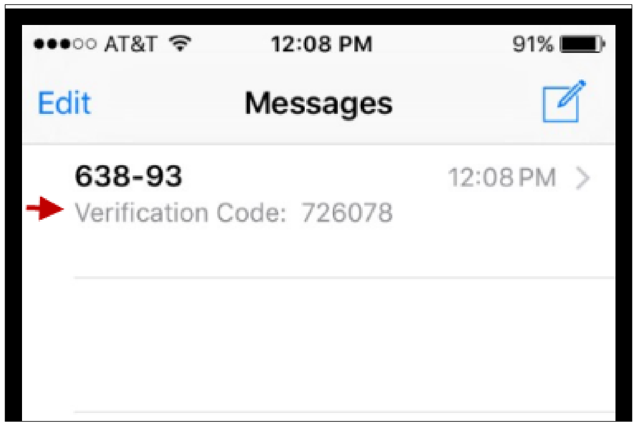
If you need more information or received this email in error please contact:
Michael's Office
9762 Richmond Circle
Boca Raton, FL 33434
(561) 504-2860

Verification Text

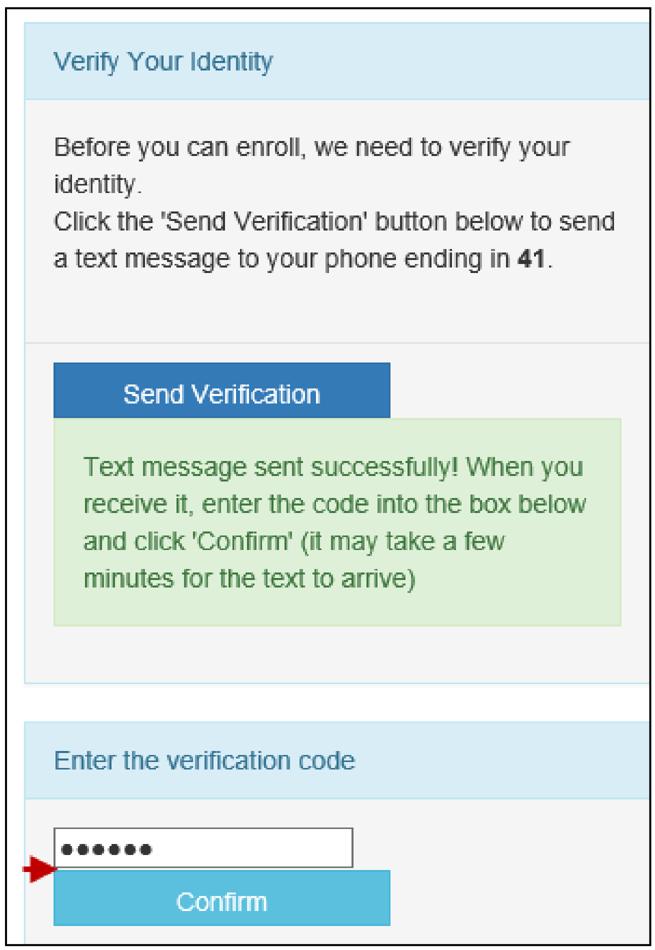
The Verification page opens. The caregiver presses the “Send Verification” button. This sends a verification code to the text enabled phone number.



The verification code is sent to the caregiver’s text enabled phone. This should be the same phone used to send the Registration Invite Email.

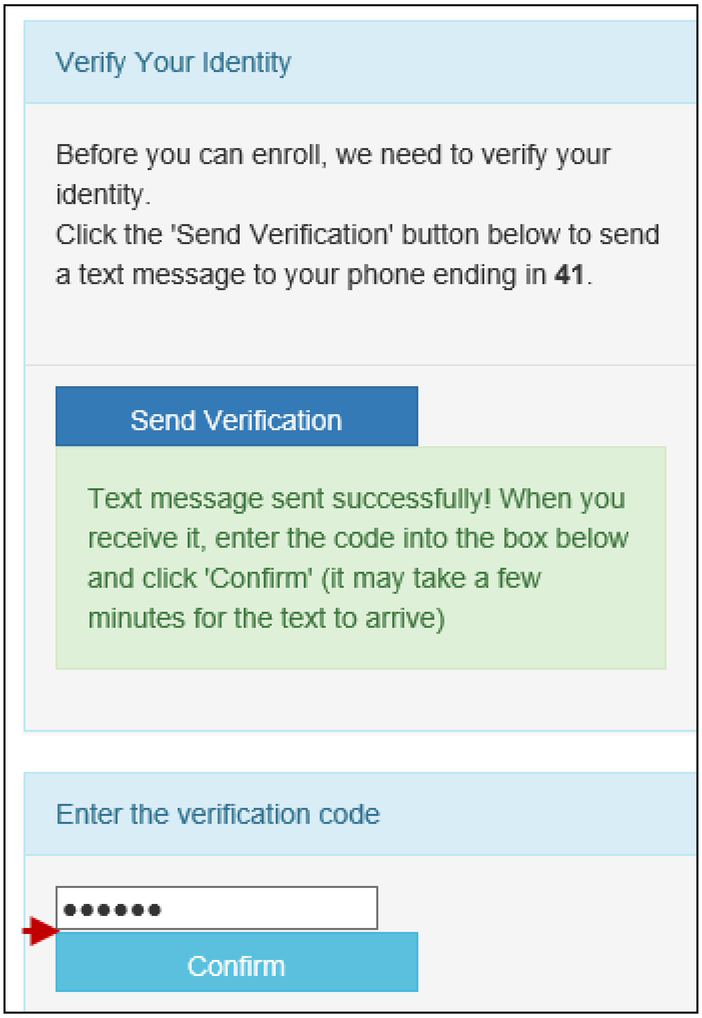


The caregiver enters the Verification Code and presses **Confirm**.



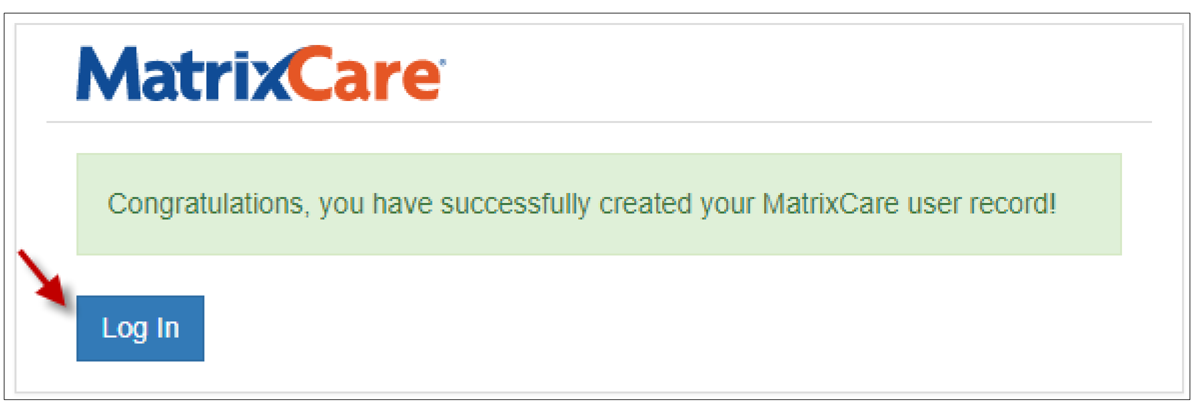
Create Account Page

The Create Account page opens. The caregiver enters their Username, Password, and confirms their Password. The password policy displays at the top of the page to assist the user. Press **Create Account**.

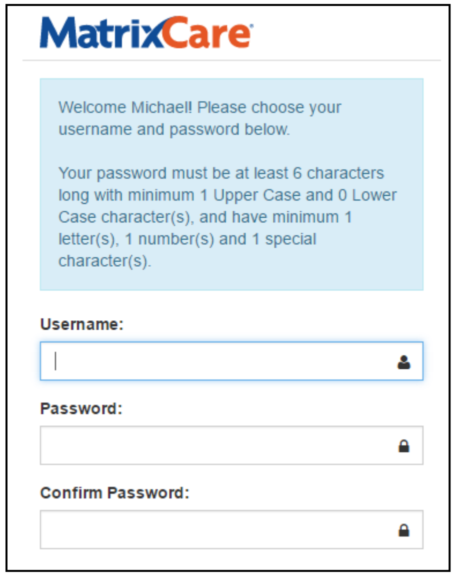


Log In

The Log In page displays. The caregiver presses **Log In**.

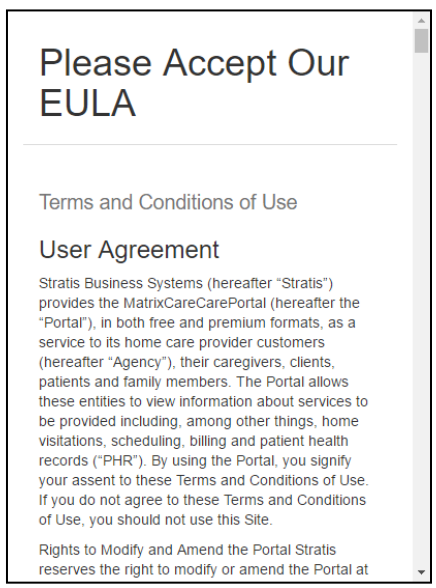


The Mobile Sign In page opens. The mobile user enters their user name and password, and presses **Sign In**.

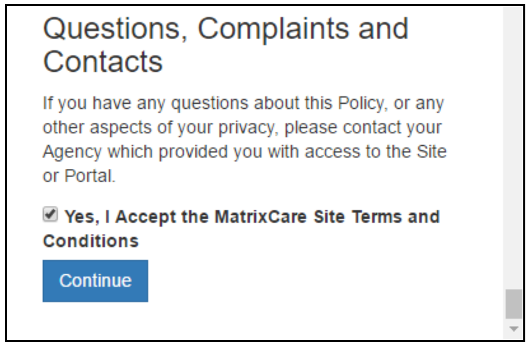


Accept EULA

The caregiver needs to accept the End User License Agreement the first-time logging in.



Scroll down and press to enter a check in the **Yes** box and press **Continue**.

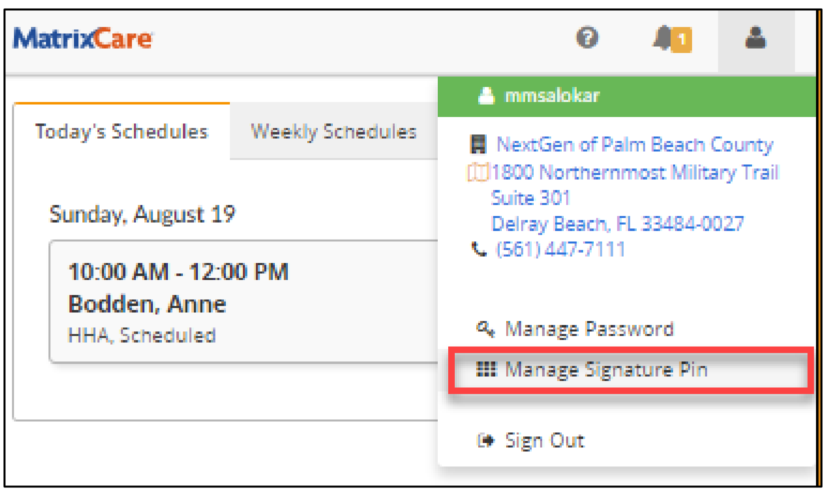


Create Signature PIN

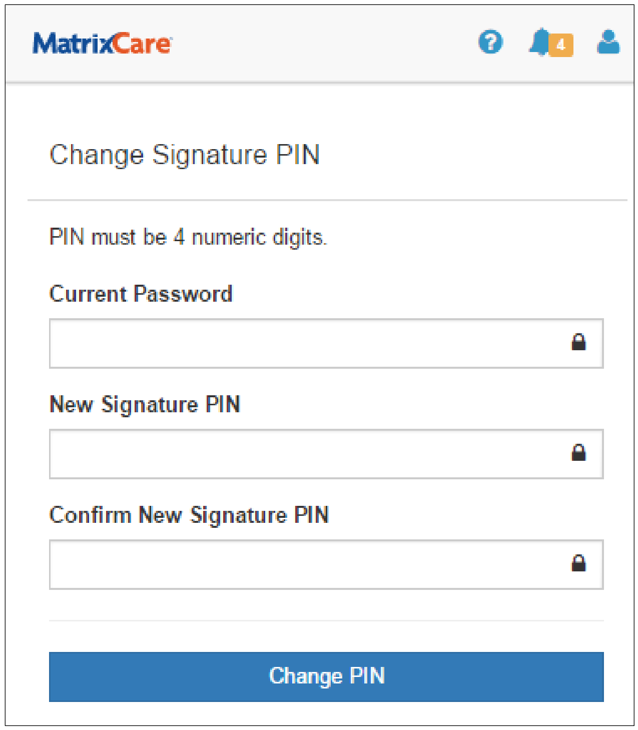
The caregiver's MatrixCare Home Care Mobile Home Page opens. It is recommended the caregiver immediately create their Signature PIN. The Caregiver should do this in advance of their first visit, so that they have it ready when signing in at the first visit.

To Create a Signature PIN:

1. Press the **Account Settings** button on the tool bar then press **Manage Signature PIN**.

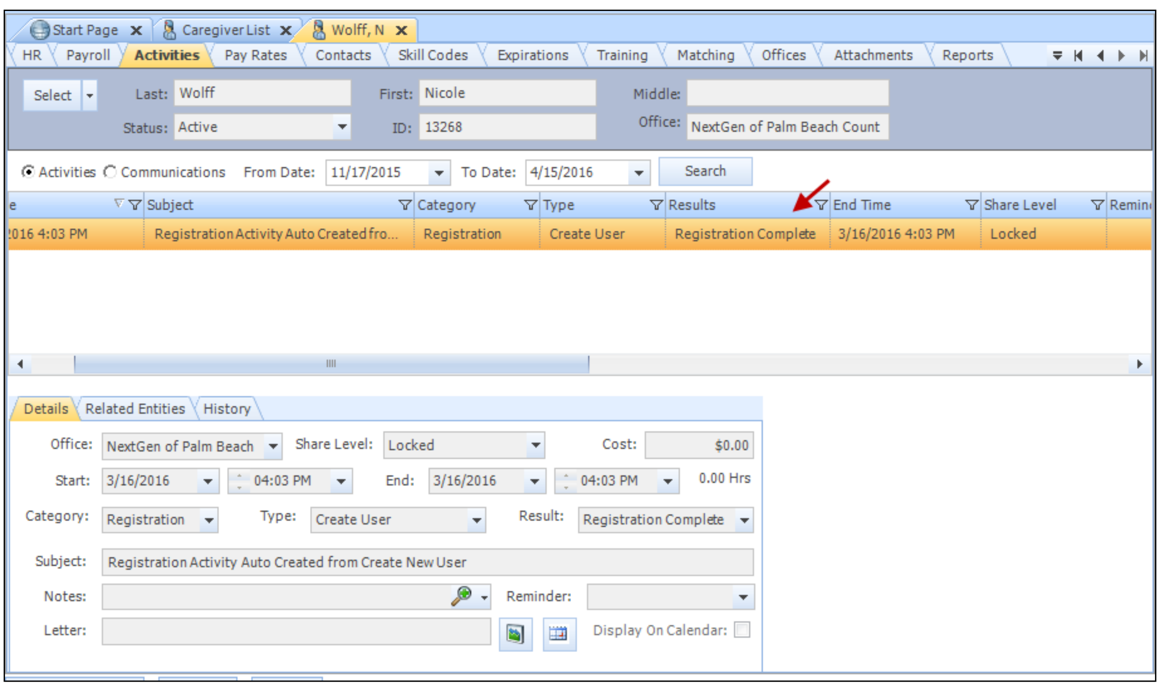


2. Enter your current MatrixCare password, a **4-digit PIN** and confirm it, and press **Change PIN**.



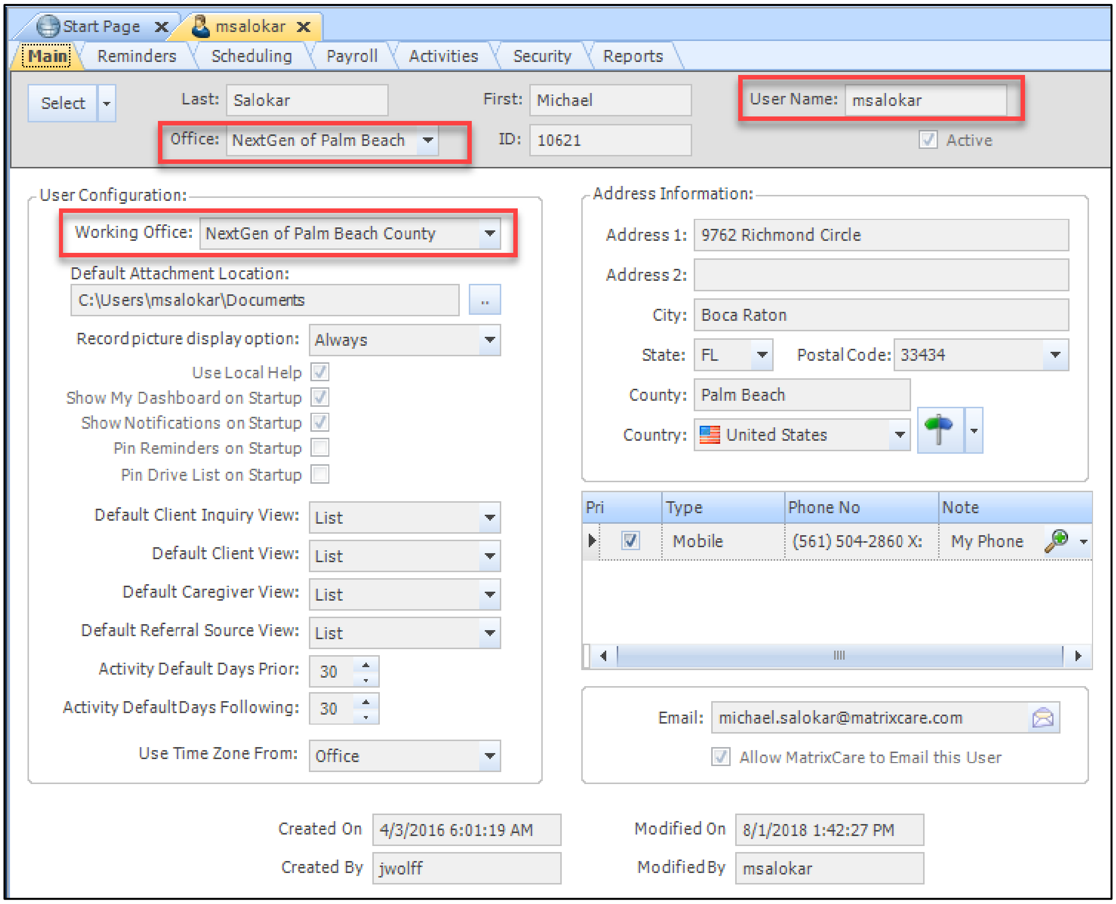
Registration Activity - Registration Complete

When the caregiver successfully created the MatrixCare Mobile account, the Registration Activity Result is updated to Registration Complete.

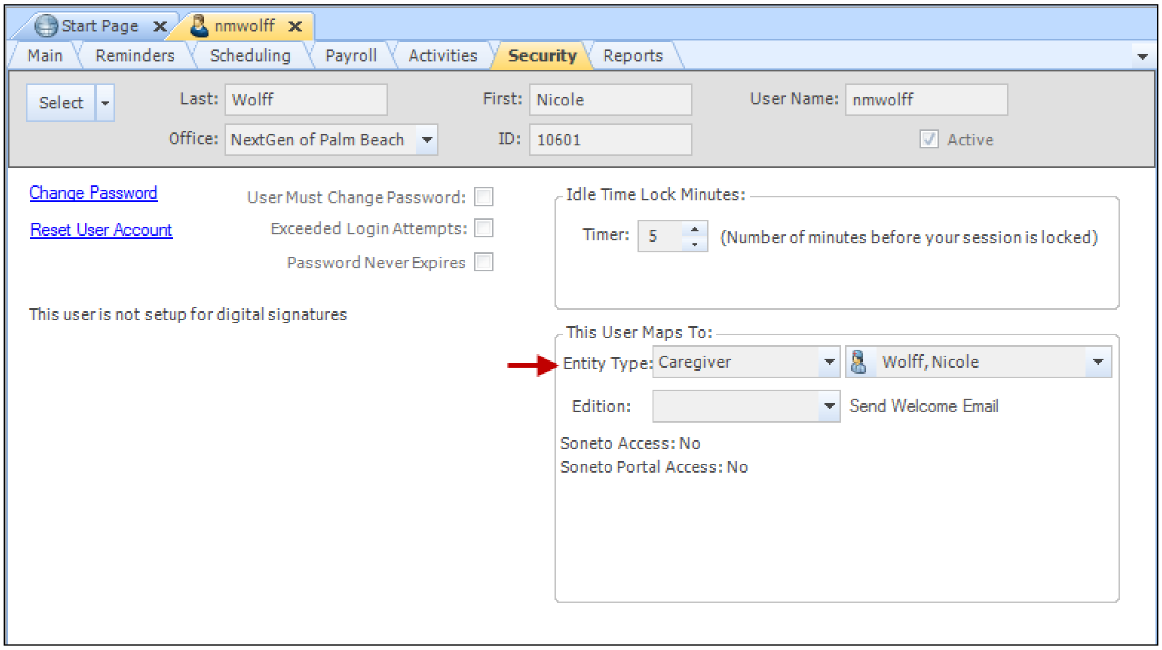


User Record

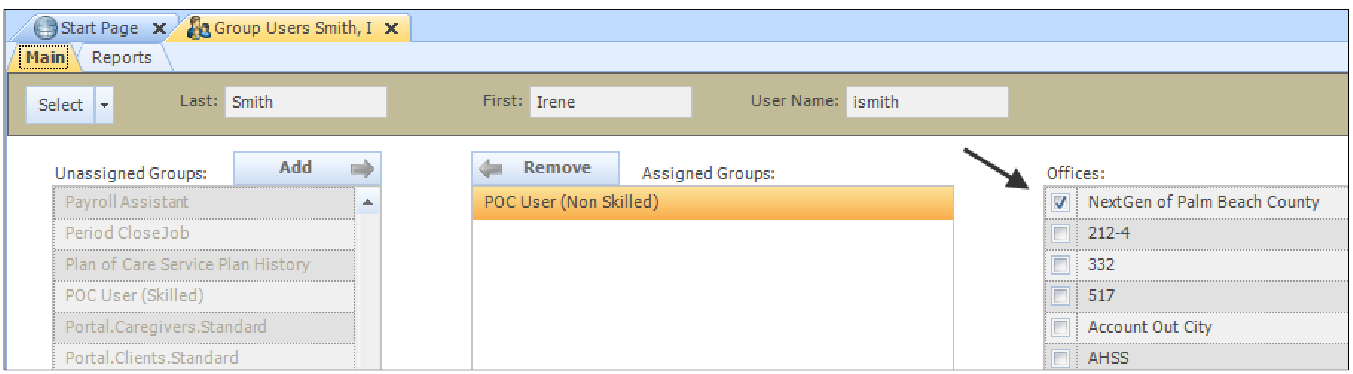
An active User record was created for the caregiver, with the username and password the caregiver specified. The Last Name, First Name, and Address are from their caregiver record. The Office and Working Office are the “Belong’s To” office that were on the caregiver record at the time the Registration was completed.



The User record is mapped to the Caregiver record.



Either the “POC User (Non Skilled)” or “POC User (Skilled)” permission group and Office(s) are assigned to the user. The offices are those that existed on the mapped caregiver record at the time Registration was completed. You can modify the offices assigned if necessary.



Mobile Information Populating from the Back Office

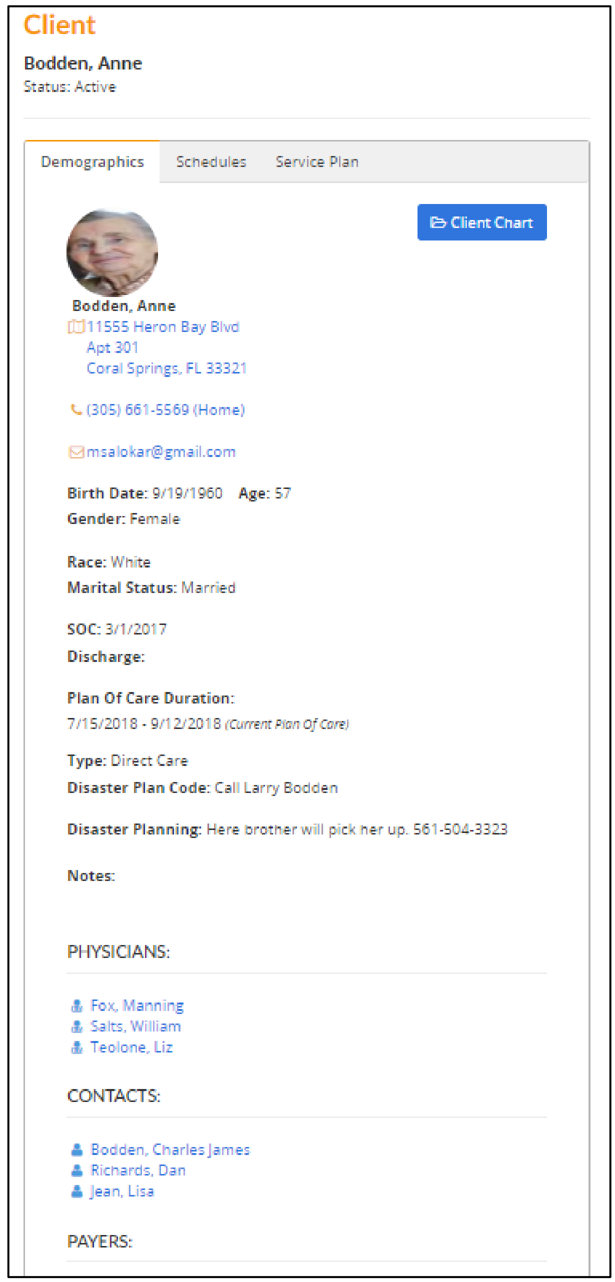
Information that displays on the mobile device is populated from the back office system.

Client > Demographics tab

Client > Demographics tab displays the name of the client's Physicians, Contacts and Payers.

- PHYSICIANS - populate from the **Admission > Physician** tab of **the most recent admission**. The primary care physician displays first, then all other physicians are listed in alphabetical order.
- CONTACTS - populate from the **Client > Contacts** tab. The emergency contacts display first, followed by other contacts.
- PAYERS - populate from the **Client > Payers** tab. The primary payer displays first, followed by other sequenced payers.

Physicians, Contacts and Payers names all have links that provide detail information.

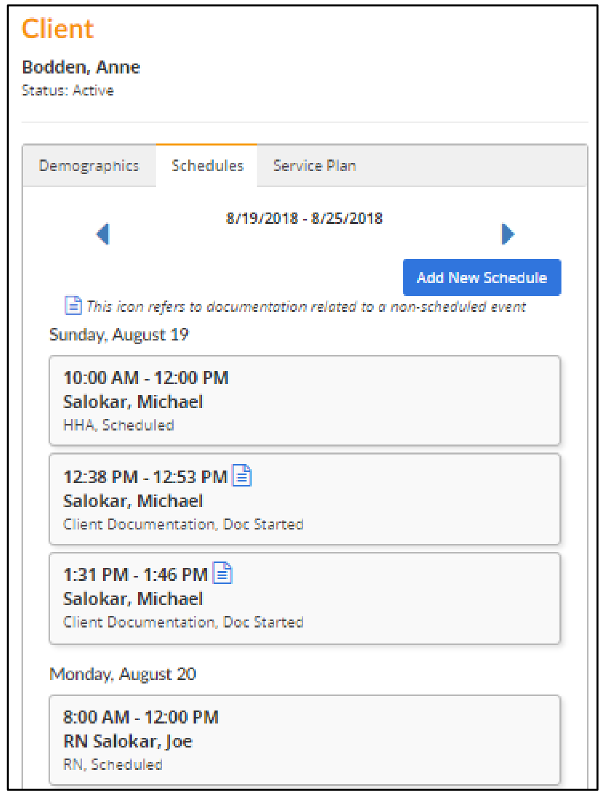


Client > Schedules tab

Client > Schedules tab displays all caregiver schedules for the client.

Click on a schedule to view the clients information:

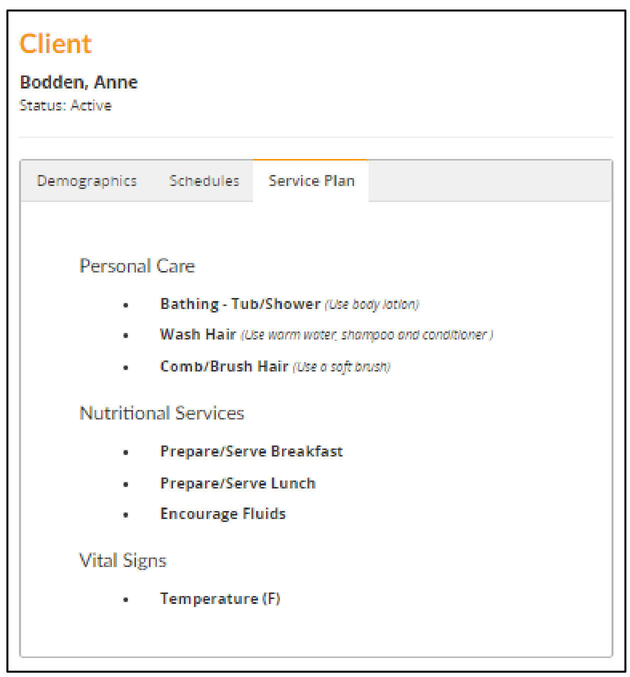
- Appointment
- Tasks
- Expenses
- Admission



Client > Service Plan tab

Client > Service Plan tab displays the client's Service Plan. A list of all the tasks for the client service plan appears.

- Service Plan - populates from the most recent **Admission**. This is the most recent published service plan from the most recent plan of care in the most recent admission. The service plan displays all the tasks for the caregiver.

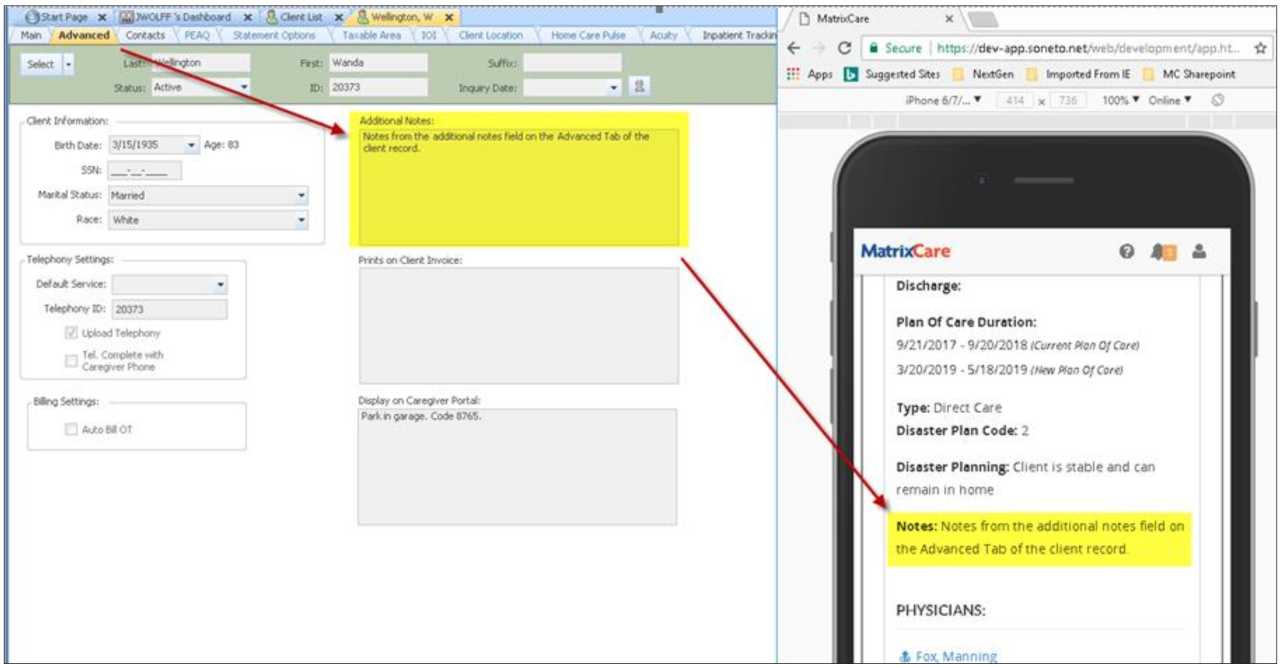


Clients > Advanced tab

The back office user can create Additional Notes associated with Client information on the clients record on the Advanced tab in the back office.

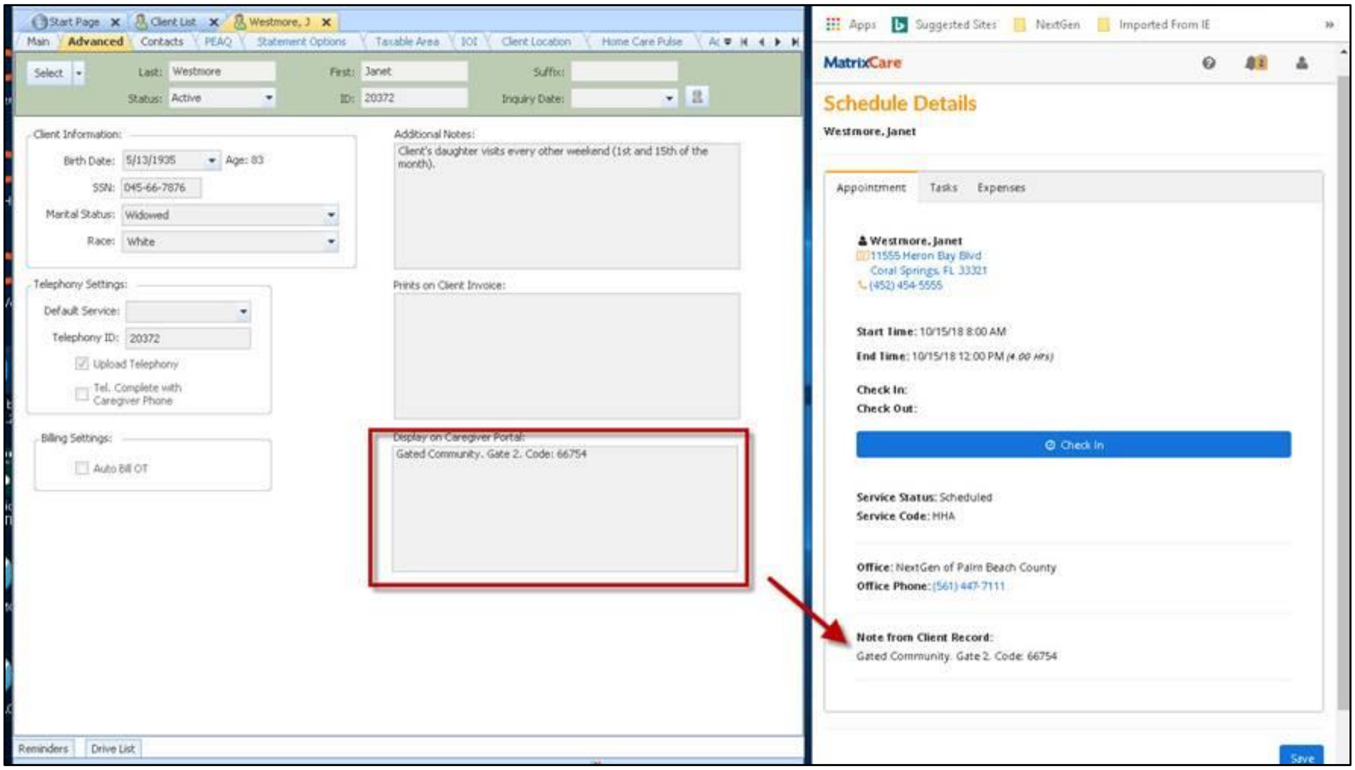
The additional notes information appears in the Notes section on the Demographics tab on the mobile device. The mobile Notes field on the Client Demographics tab populates from the Additional Notes field on the Advanced tab of the back office Client record.

Note: These notes are in locked and cannot be modified by the mobile user. Only the back office user can make changes.



In the back office client record, on the clients Advanced tab, the “Display on Caregiver Portal” field information appears on the Schedule Details page in the Appointments tab below the “Note from Client Record” section on the mobile device.

Note: These notes are in locked and cannot be modified by the mobile user. Only the back office user can make changes.



Mobile Information Populating to the Back Office

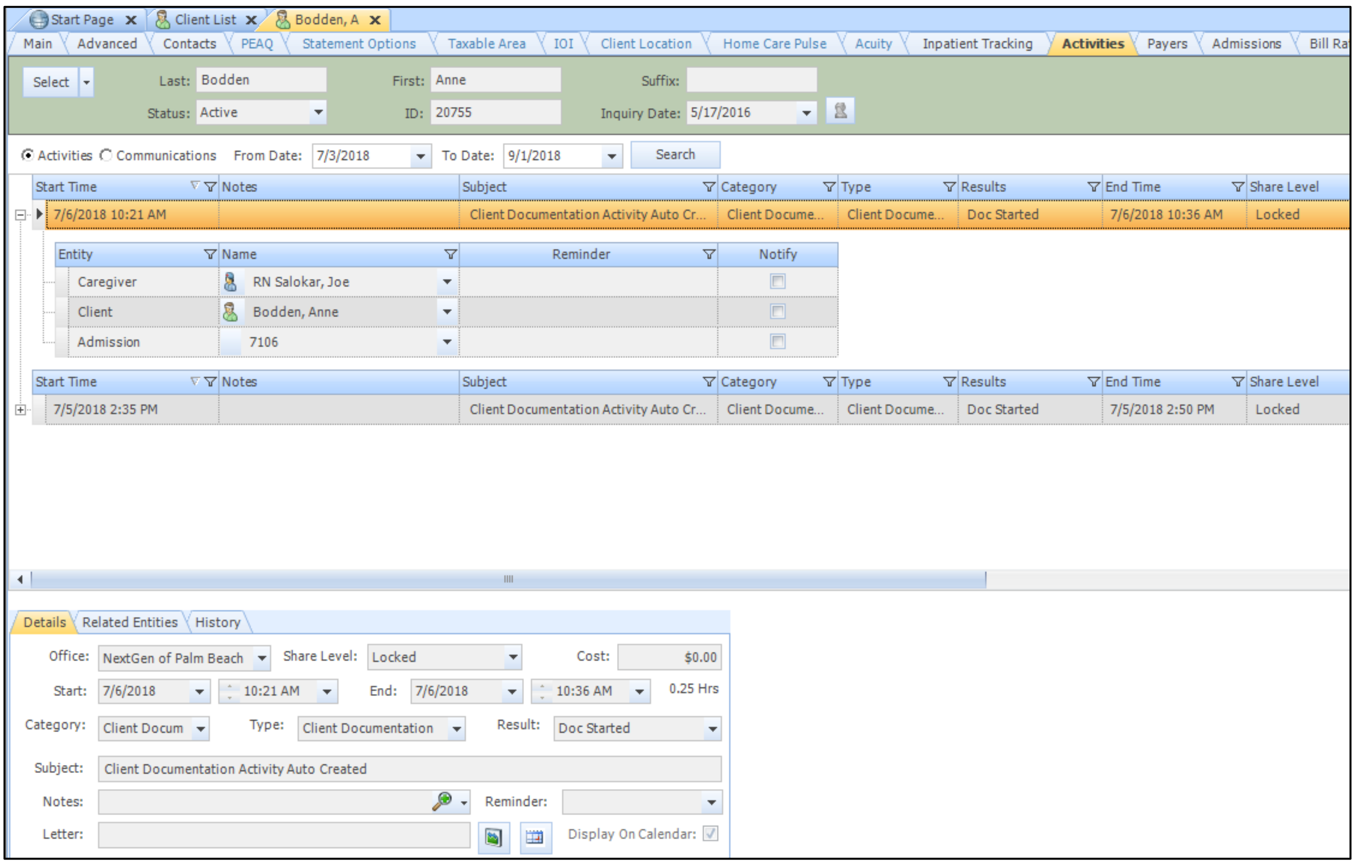
Information that displays on the mobile device, is populated to the back office system.

Clients > Activities Tab

When the clinician creates medications and document forms without an associated schedule, a Client Documentation Activity is created and displays on the clients Activities tab in the back office system.

Note: These activities are in Locked Share Level and cannot be modified in the back office.

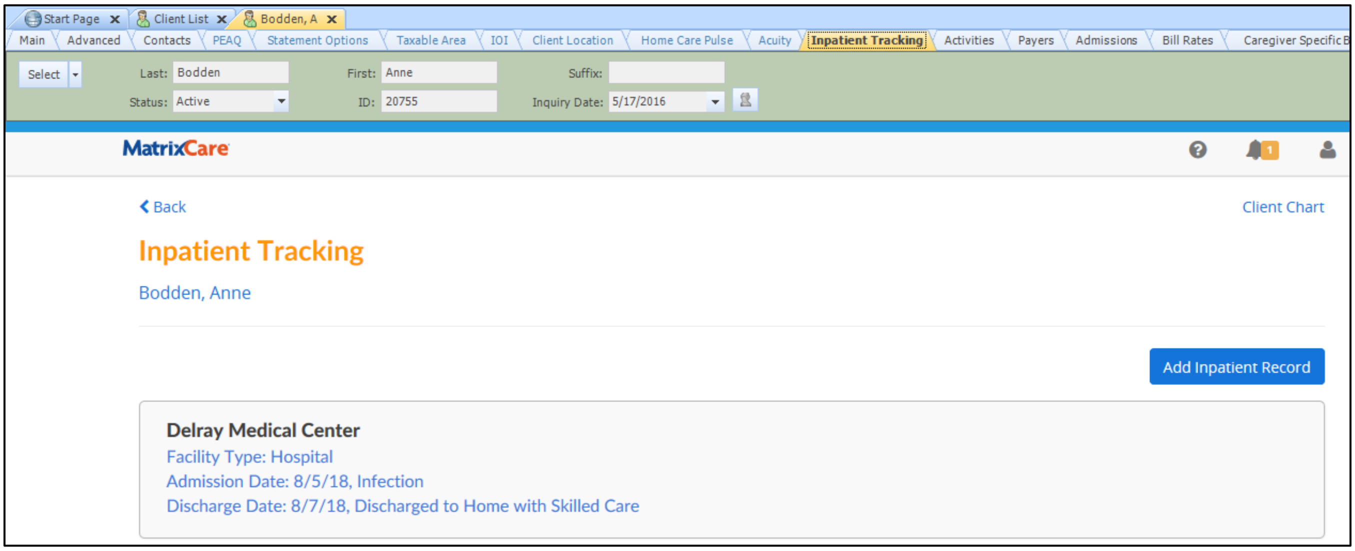
The activity shows a related entity of the Admission.

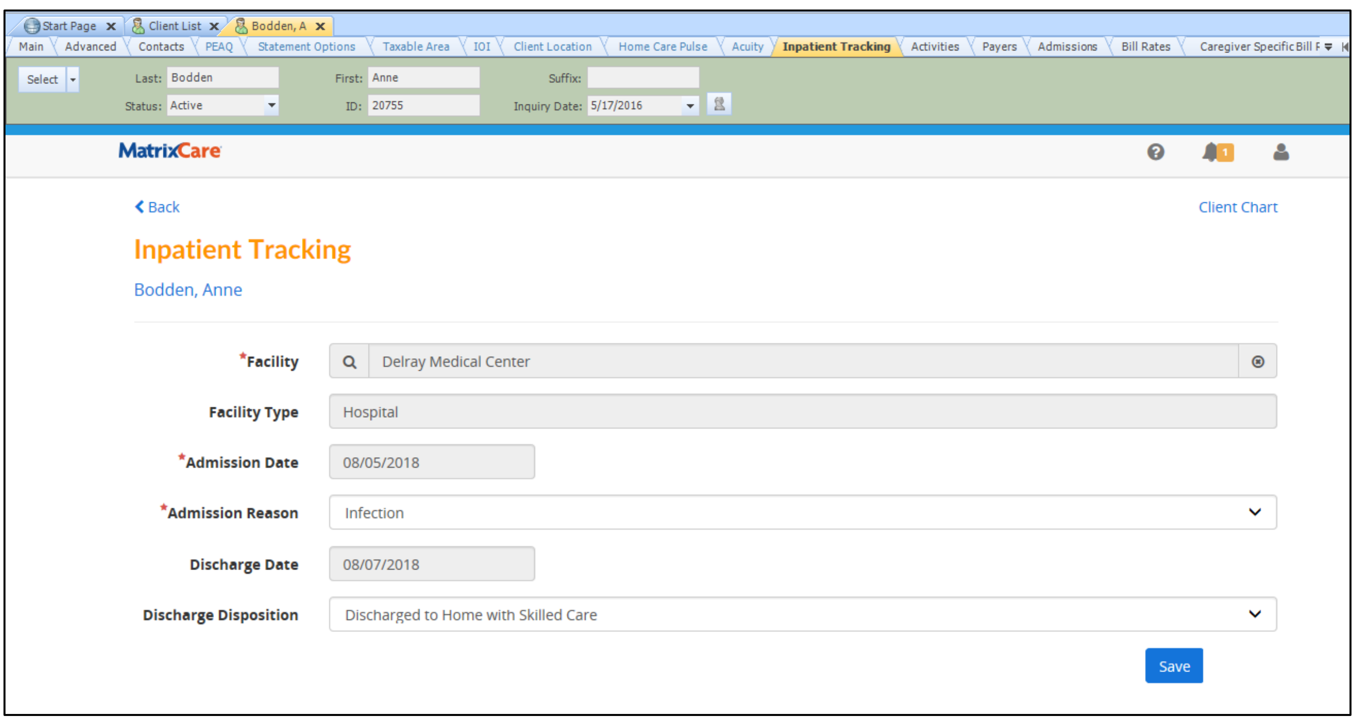


Clients > Inpatient Tracking Tab

This tracks inpatient stays for Clients on the Inpatient Tracking tab, in the Home Care back office. Inpatient tracking can also be used to document ER Visits.

> **Note**: To have a mobile user delete the inpatient tracking information, you must set up a custom permission and add it to the POC User (Skilled) user group.





Mobile Warning Messages

Mobile warning messages are visible on the Call Review and Call Log tabs of the Telephony form. On the Call Review tab, view and filter the messages in the Tel.Status column. On the Call Log tab, view and filter messages in the Flags column.

Warning Messages	Description
Multiple Arrivals	Multiple arrival or check in events for this schedule.
Multiple Departures	Multiple departure or check in events for this schedule.
No Arrival Call	No arrival call or check in event is associated to this schedule.
No Departure Call	No departure call or check out event is associated to this schedule.
Multiple matching clients	Multiple possible matching clients for this schedule exist (the phone number dialed in from appears on multiple client records).
Multiple matching caregivers	Multiple caregivers are potential matches for this schedule.
Zero Duration	The visit duration is zero minutes or units due to incoming telephony calls or arrival and departure events (usually due to rounding on imported arrival/check in and departure/check out times).
Service Changed	The service code reported is different than the service code originally scheduled for the visit.
Duration Changed	The duration of the visit is different than the originally scheduled visit duration due to incoming telephony calls or arrival and departure events.
Incompatible Expenses	A telephony account is shared across offices. Each office has expenses configured. The expense reported for this schedule is not active on the office it is called in for.
Call from Caregivers Phone	The incoming arrival or departure call is from a caregiver's phone.
Call from Unknown Phone	The incoming arrival or departure call is from an unknown phone number.
Not from expected location	The check in or check out event is outside the configured location threshold for this office.
Location accuracy too low	The device used to check in or check out did not meet the accuracy requirement configured for this office.
Check in/out was outside the expected time threshold	The arrival or departure event was outside the configured time threshold for this office.
Client GPS location unknown	The client record associated to this schedule is not geo located.
Location not provided	The device's location was not provided during the check in or check out event.

Warning Messages	Description
Call times not certified by the Caregiver	Call times are not certified by the caregiver for this visit.
No Tasks Completed	No tasks were recorded for this schedule during check out.